

SPONSORED PROJECT ADMINISTRATION (SPA)

PRESENTS

PI Portal

Your Gateway to PI Friendly Sponsored Project Expenditure Reports

Web Based
Intuitive-Quick-Easy

Visual Job Aid for use with the PI Portal

v.3/1/19



The University of Vermont

PI Portal: Welcome

Your Gateway to PI Friendly Sponsored Project Expenditure Reports

The PI Portal has been designed specifically for Investigators and their research administration staff who need sponsored project fiscal information quickly and easily to answer questions such as;

- How much money do I have left to spend?
- Can I hire another lab tech or graduate student this summer?

The concept is simple; on-line banking for sponsored project funding



Features



- Data Refreshed Nightly
- Project Expenditure Detail
- Payroll Expenditures
- Payroll Distributions
- Non-Payroll Expenditure Detail
- Cost Sharing Detail
- Powerful Search Engine
- Email Notification
- Download Results to Excel

PI Portal: Login

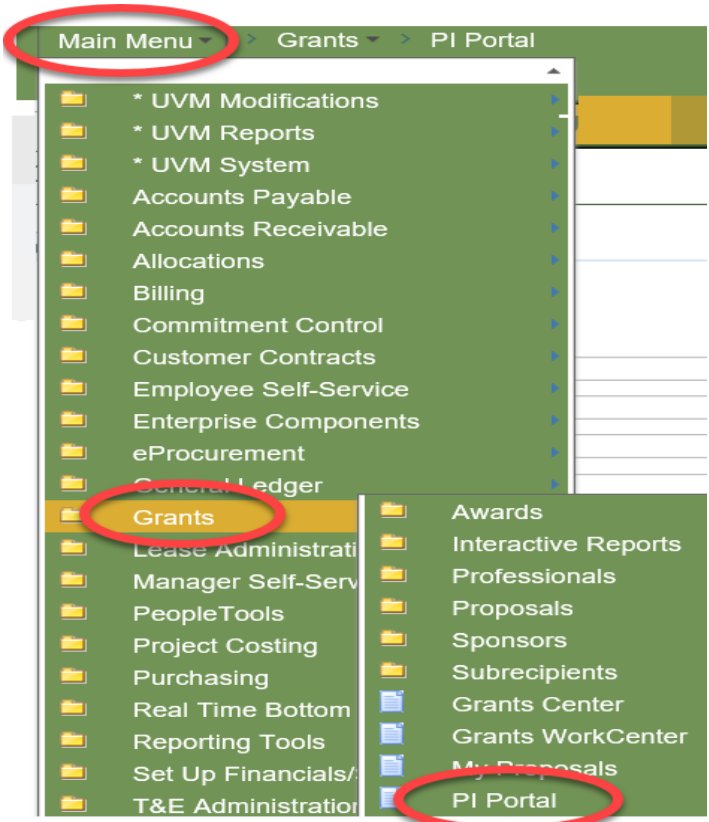
PI/Project Manager Login

1. Click [myUVM](#)
2. Click PS Financials
3. Login with your Net ID

or

1. Click [PI Portal: Login](#)
2. Click \$ Financials
3. Login with your Net ID

Staff Login



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PI Portal: Project Manager Landing Page

- Project Managers are PI eligible faculty.
- Display will include the following;
 - All Active Projects
 - Expired Projects (for 120 days post expiration date)

PI Portal	Hyperlink	Identifiers	Time	Money									
Project Manger	PS Project	PS Award	Title	Sponsor	Sponsor Award ID	Start Date	End Date	Budget	Open Encumbrance thru 6/30	Expenditures to Date	Direct Remaining	F+A Remaining	Total Amount Remaining
PM Name	029765	000028095	Sample Project	Vassar College	NSF134.A	01/01/2014	12/31/2018	461,783.00	.00	456,720.96	3,320.20	1,741.84	5,062.04
PM Name	032174	000030468	Sample Project	US Department of the Army/DOD	W911NF-16-1-0304	05/01/2016	04/30/2019	400,000.00	.00	394,134.01	4,302.85	1,563.14	5,865.99
PM Name	035603	000033125	Sample Project	Yale University	AA**Yale University	10/01/2018	05/31/2019	51,782.00	12,943.00	22,007.50	8,407.72	8,423.78	16,831.50

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**PI Portal:
Project Summary
(Budget
& Expenditures)**

From the Project Manager Landing Page, Click the Project Hyperlink and the **Project Summary Page** Opens.

Project Summary | Payroll Information | Transaction Detail

Project Summary

PS Project 032174 **Spend at the Project Level**

Project Mgr Catamount

Department Computer Science

Start Date 05/01/2016 End Date 04/30/2019

Cost Share? N Status ACTIVE

Sponsored Total Direct Remaining 4,302.85

PS Award 000030468

Award Title Test Project **Bill at the Award Level**

Sponsor US Department of the Army/DOD

Sponsor Award ID W911NF-16-1-0304

Award PI Catamount

F+A Base Modified Total Direct Cost

F+A Rate (%) 56.00

[Return to PI Portal/Home](#)

[Go to Search Page](#)

Budget Summary / Chartstrings | Download Results to Excel | First 1-14 of 14 Last

Account	Description	Budget	Open Encumbrances (Thru 6/30)	Expenditures	Remaining Amount
1 F5880	Personnel Salary	192,141.00	0.00	178,399.19	13,741.81
2 F5990	Fringe Benefits	25,293.00	0.00	29,579.69	-4,286.69
3 F6000	Services & Other Expenses	0.00	0.00	0.00	0.00
4 F6004	Lab Research Supplies & Servic	9,964.00	0.00	158.43	9,805.57
5 F6011	Publication Costs	2,472.00	0.00	1,760.00	712.00
6 F6020	Computer Services	4,016.00	0.00	99.99	3,916.01
7 F6021	Computer Devices	0.00	0.00	9,742.36	-9,742.36
8 F6050	Domestic Travel	3,000.00	0.00	3,223.25	-223.25
9 F6052	Foreign Travel	7,701.00	0.00	16,532.24	-8,831.24
10 F6120	Consultant & Contract Services	0.00	0.00	0.00	0.00
11 F6532	Tuition & Fees	21,100.00	0.00	21,889.00	789.00
12	TOTAL DIRECT	265,687.00	0.00	261,384.15	4,302.85
13	TOTAL F+A	134,313.00	0.00	132,749.86	1,563.14
14	TOTAL	400,000.00	0.00	394,134.01	5,865.99

Money

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PI Portal: Payroll Information

Click on the Payroll Information Tab and the **Payroll Expenses & Distributions Page** Opens.

The screenshot shows the 'Payroll Information' section of a web application. At the top, there are three tabs: 'Project Summary', 'Payroll Information' (highlighted with a red circle), and 'Transaction Detail'. Below the tabs, there are two buttons: 'Payroll Expenses To Date' (highlighted with a red circle) and 'Get Payroll Distributions' (highlighted with a red circle). A red arrow points from the 'Payroll Expenses To Date' button to a table titled 'Salary Expenses To Date'. A red box contains the text: 'Look to see who has been charged to the Project. Do I know them? Who is Missing?'. To the right, a 'Warning' message is circled in red, stating: 'There are distributions that go beyond the end date of the project in the current fiscal year or the upcoming fiscal year.' Below the table, a note reads: 'Note: Student wages, temporary wages, additional pay, including summer salary for 9-month and 10-month appointments, are not encumbered. These costs will be posted as a payroll expenditure.' Below the note, there is a 'Fiscal Year' dropdown set to '2019' and a 'Get Payroll Distributions' button. A red arrow points from this button to a table titled 'Payroll Distributions'. A red box contains the text: 'Time to fix the distribution and not wait until closeout.' The 'Payroll Distributions' table has columns: Name, Empl ID, Home Dept, Message, Effective Date, Distrib End Date, Percent, and Function Descr. Two rows in the table have red messages: 'This distribution is past the project end date of 04/30/2019. Please correct as soon as possible.' A green circle highlights the 'Effective Date' and 'Distrib End Date' columns. At the bottom left, there is a 'Notify' button (highlighted with a red circle) and a red arrow pointing to it. A red box at the bottom contains the text: 'Need Help, Click and send an email, that includes a hyperlink to the Project Summary Page'.

Name	Account Description	Expense Amount	Fringe Amount	Encumbered Salary Thru 6/30	Encumbered Fringe Thru 6/30
1	Tenure-Track Tenured	27,574.59	12,030.03		
2	Person 1 Person 2 Person 3	Graduate Research Assistants	59,868.40	6,909.15	
3	Person 3	Staff Salary	852.94	367.62	
4	Person 4 Person 5	Graduate Research Assistants	63,228.26	7,066.64	
5	Person 5	Graduate Research Assistants	26,875.00	3,206.25	

Name	Empl ID	Home Dept	Message	Effective Date	Distrib End Date	Percent	Function Descr
1		54050	This distribution is past the project end date of 04/30/2019. Please correct as soon as possible.	07/01/2018	06/30/2019	100.00	Rsch-Spon
2	Person 1 Person 2 Person 3	54050		09/01/2018	11/30/2018	100.00	Rsch-Spon
3	Person 4 Person 5	54050		07/01/2018	09/30/2018	50.00	Rsch-Spon
4	Person 5 Person 6 Person 7 Person 8	54050		07/01/2018	09/30/2018	100.00	Rsch-Spon
5		54050		09/01/2018	09/30/2018	100.00	Rsch-Spon
6		54050	This distribution is past the project end date of 04/30/2019. Please correct as soon as possible.	10/01/2018	06/30/2019	50.00	Rsch-Spon
7		54050		10/01/2018	10/31/2018	50.00	Rsch-Spon

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PI Portal: Transaction Detail

Click on the **Transaction Detail Tab** and you can find all transactions or search for particular cost items.

The screenshot shows the 'Transaction Detail' tab selected in the top navigation bar. Below the navigation bar, there is a search section with a 'Budgetary Account or Account Description' field containing 'COMPUTER'. A red box highlights this field with the text 'Run searches by any budget line.' Below the search section, there is a 'Posted Transactions' section with a 'Results' tab selected. A red box highlights the 'Results' tab with the text 'Click and send an email to your department administration - the message will contain a hyperlink to the project summary page'. Below the 'Results' tab, there is a table of transactions with columns: Budget Account, Budget Account Description, Account, Account Description, Monetary Amount, Accounting Date, Transaction ID, Name, and Long Description. The table contains 7 rows of transaction data. A red box highlights the 'Budget Account Description' column with the text 'Click and send an email to your department administration - the message will contain a hyperlink to the project summary page'. At the bottom left, there is a 'Notify' button with a red box around it and an arrow pointing to it.

Project Summary | Payroll Information | **Transaction Detail**

*Data as of Last Night

Enter Date Range

Get Transaction Detail From Date To Date

Budgetary Account or Account Description

Run searches by any budget line.

Posted Transactions

Find | Download Results to Excel First 1-7 of 7 Last

Results

Budget Account	Budget Account Description	Account	Account Description	Monetary Amount	Accounting Date	Transaction ID	Name	Long Description
1 F6020	Computer Services	60005	Computing Supplies	99,990	10/01/2016	0000262498		Office Supplies-OMNI DEV
2 F6021	Computer Devices	65022	Non-Cap Cmpt Hardware <\$5000	59,990	10/02/2017	P028548-51		WWW.NEWEGG.COM-08/31/2017
3 F6021	Computer Devices	65022	Non-Cap Cmpt Hardware <\$5000	22,390	10/02/2017	P028548-51		WWW.NEWEGG.COM-09/01/2017
4 F6021	Computer Devices	65022	Non-Cap Cmpt Hardware <\$5000	369,980	10/02/2017	P028548-51		WWW.NEWEGG.COM-08/31/2017
5 F6021	Computer Devices	65022	Non-Cap Cmpt Hardware <\$5000	3168,000	10/02/2017	P028548-51		WWW.NEWEGG.COM-08/31/2017
6 F6021	Computer Devices	80014	IC - Hardware	2082,000	01/12/2017	0000269853		141954-E72D
7 F6021	Computer Devices	80047	IC-Computing Services Exp	4060,000	12/05/2017	0000291733		VACC Tier 3 payment-

Notify

Click and send an email to your department administration - the message will contain a hyperlink to the project summary page

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PI Portal: Search Window

- Great Search capabilities.
- For example, search by PS Award ID, will return results that display All active PS projects established under that PS Award ID.

Search Window doubles as the default PI Portal Landing Page for Staff

Sponsored Summary

PI Portal: Sponsored Project Search

Default search is set to Active. Toggle btw Active and All projects (active, expired, closed).

PS Project #

Project Manager (Last,First or Partial)

PS Award ID

Award PI (Last,First or Partial)

Department

College

Sponsor Name

Sponsor Award ID (or Partial)

Start Date Greater than or =

End Date Less than or =

Project Status

All

Active and Expired up to 120 days ago

Retrieve Data (as of last night)