

# 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

Version 1/1/2023



The University of Vermont

# PI Portal: Welcome

## Your Gateway to Friendly Sponsored Project Expenditure Reports

Specifically designed for Investigators and Research Administrators who need sponsored project fiscal information quickly and easily to answer questions such as;

- How much money do I have left to spend?
- Will I have Carryforward?
- Will I have funds available for a No Cost Extension?
- Who is being Paid from my Grant?

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



10 Great Features



1. Data Refreshed Nightly
2. Project Expenditure Detail
3. Payroll Expenditure by Person
4. Payroll Distributions by Person
5. Effort Commitment by Key Personnel
6. Non-Payroll Expenditure Detail
7. Cost Sharing Detail
8. Search Engine for Transactions
9. Email Notification
10. Download Results to Excel

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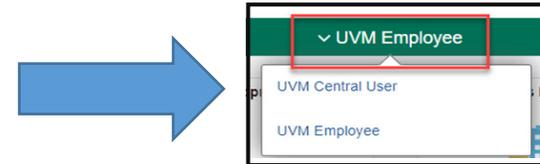
## PI Portal: Login

### PI/Project Manager Login

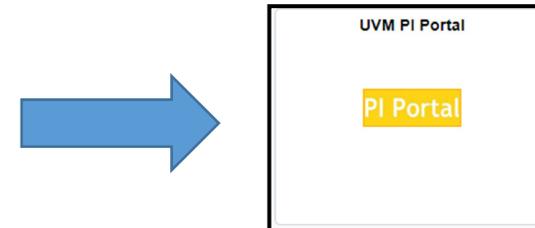
1. Click [PI Portal: Login](#)
2. Click \$ Financials
3. Login with your Net ID

or

1. Click [MyUVM](#)
2. Click PS Financials
3. Login with your Net ID
4. Select UVM Employee



5. Click PI Portal Tile



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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)**

Hyperlink	Project and Award Identifiers							Time		Money					
Project ID	Project Manager	Project Title	Award PI	PS Award	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 Remaining
<a href="#">39118</a>	Project Manger	DMREF/Collaborative Research	Award PI	AWD00000659	DMREF/Collaborative Research: Design and Optimization o	National Science Foundation/NSF	2118810	9/1/2021	8/31/2025	401,103.00	30,835.84	128,903.98	158,821.25	82,541.93	241,363.18
<a href="#">38187</a>	Project Manger	AI Institute: Planning	Award PI	AWD00000257	AI Institute: Planning: The Proteus Institute	National Science Foundation/NSF	2020247	10/1/2020	12/31/2022	500,000.00	16,745.26	478,533.90	3,938.14	782.7	4,720.84
<a href="#">500301</a>	Project Manger	Molecular and Cellular Self	Award PI	AWD00000939	Molecular and Cellular Self Organization	Tufts University	104336-00001	1/1/2022	12/31/2022	13,632.00	0	13,390.68	221	20.32	241.32
<a href="#">35603</a>	Project Manger	GR104715 (CON-80001519)	Award PI	000033125	EFRI C3 SoRo: Programmable Skins for Moldable Robots	Yale University	GR104715 (CON-80001519)	10/1/2018	10/31/2022	496,332.00	0	496,325.78	3.69	2.53	6.22
<a href="#">37888</a>	Project Manger	REU Supplement: EFRI C3 SoRo	Award PI	000033125	EFRI C3 SoRo: Programmable Skins for Moldable Robots	Yale University	GR104715 (CON-80001519)	10/1/2018	10/31/2022	7,800.00	0	7,800.00	0	0	0
							GRID TOTALS			1,418,867.00	47,581.10	1,124,954.34	162,984.08	83,347.48	246,331.56

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

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

Project Summary | Payroll Information | Transaction Detail | Financial Documents | Personnel Commitments

**Project Summary** | Spending Occurs at the Project Level

PS Project: 500714 | CIROH: Floodplains  
 Project Mgr: Project Manager Name  
 PM Home Dept: Geography & Geosciences  
 College: CAS  
 Status: ACTIVE | Cost Share?: N  
 Start Date: 08/01/2022 | End Date: 07/31/2023  
 Includes 90 Day Pre-award spending:

Sponsored Total Direct Remaining: 422,916.32

PS Award: AWD00001127  
 Award PI: PI Name  
 Award Title: CIROH: UVM Subproject #2: Floodplains  
 Award Dept: Geography & Geosciences  
 Sponsor: University of Alabama - Tuscaloosa  
 Sponsor Award ID: A22-0305-S001  
 Prime Sponsor: National Oceanic Atmospheric Admin/NOAA  
 Prime Award ID: NA22NWS4320003  
 F+A Rate (%): 56.00  
 F+A Base: Modified Total Direct Cost  
 Contract Type: Cost Reimbursement  
 Award Purpose: RESEARCH - Basic

Award Demographics  
 Billing Occurs at the Award Level

Go to Search Page

Budget Summary / Chartstrings | Download Results to Excel | First | 1-15 of 15 | Last

Budget Summary | Chartstrings

Account	Account Description	Budget	Open Encumbrances (Thru 6/30)	Expenditures	Remaining Amount
1 F5000	Personnel Salary	262432.00	27004.42	13836.74	221590.84
2 F5990	Fringe Benefits	89300.00	6846.07	3993.72	78460.21
3 F6000	Other Expenses and Services				
4 F6004	Lab Research Supplies & Servic	57060.00	4393.90	4417.80	48248.30
5 F6011	Publication Costs	2000.00			2000.00
6 F6021	Computer Devices	11900.00			11900.00
7 F6050	Domestic Travel	17220.00		2821.03	14398.97
8 F6104	Research Subject Costs				
9 F6120	Consultant & Contract Services				
10 F6500	Equipment	39261.00			39261.00
11 F6510	Equipment Maintenance				
12 F6532	Tuition & Fees	12204.00		6147.00	6057.00
13	TOTAL DIRECT	492377.00	38244.39	31216.29	422916.32
14	TOTAL F+A	246911.00		14038.78	232872.22
15	TOTAL	739288.00	38244.39	45255.07	655788.54

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' page in the PI Portal. The 'Payroll Information' tab is selected and circled in red. A red box highlights the 'Payroll Expenses To Date' button. A red box with an arrow pointing to the 'Person 1' row in the 'Salary Expenses To Date' table contains the text: 'Review to ensure the correct people are being charged to the Project. Who is missing? Make corrections where needed.' A red box with two arrows pointing to the 'Warning' message contains the text: 'Warning There are distributions that go beyond the end date of the project, please correct.' A red box with an arrow pointing to the 'Get Payroll Distributions' button contains the text: 'Time to fix Distributions and Not wait for closeout'. A red box with an arrow pointing to the 'Notify' button at the bottom left contains the text: 'Need Help? Click Notify and send an email, that includes a hyperlink to the Project Summary Page.' The 'Salary Expenses To Date' table has the following data:

Name	Account Description	Expense Amount	Fringe Amount	Encumbered Salary Thru 6/30	Encumbered Fringe Thru 6/30
1 Person 1	Research Faculty	3,262.30	1,533.28		
2 Person 2	Graduate Research Assistants	6,337.26	468.96	14,762.64	1,092.44
3 Person 3	Research Faculty	4,237.18	1,991.47	12,241.78	5,753.64

The 'Payroll Distributions' table has the following data:

Name	Empl ID	Empl Rcd Nbr	Fiscal Year	Home Dept	Message	Effective Date	Distrib End Date	Percent	Function Description
1 Person 1	0140573	1	2023	52160	This distribution is past the project end date of 7/31/2023. Please correct as soon as possible.	10/01/2022	10/31/2023	30.00	Rsch-Spon
2 Person 2	0140573	1	2023	52160		11/01/2022	11/30/2022	30.00	Rsch-Spon
3 Person 3	0150261	1	2023	54030		09/01/2022	06/30/2023	100.00	Rsch-Spon
4 Person 4	0120102	4	2023	54030		10/01/2022	10/31/2022	18.70	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.

Project Summary | Payroll Information | **Transaction Detail** | Financial Documents | Personnel Commitments

**Transaction Detail**    Project 500714    Project Start Date 08/01/2022    End Date 07/31/2023

\*Data as of Last Night    Enter Date Range    **Budgetary Account or Account Description**

**Get Transaction Detail**    From Date [ ]    To Date [ ]    **TUITION & FEES**

▼ **Posted Transactions**    Find | Download Results to Excel    First 1 of 1 Last

Transactions	Chartfields	Budget Account	Budget Account Descr	Account	Account Description	Monetary Amount	Accounting Date	Transaction ID	Name	Long Description
1		F6532	Tuition & Fees	65321	Tuition & Fees Expense	6147.000	11/08/2022	XBN0403911		440M Payment-Grant Project 500-

**Results**

**Get Payroll Transaction Details (By Name/Dates)**    Enter Date Range    **Account Description or Name (Partial OK)**

From Date [ ]    To Date [ ]    **Person 1**

▼ **Payroll Actuals by Person**    Find | Download Results to Excel    First 1-4 of 4 Last

Expenses	Chartfields	Name	Journal ID	Journal Date	Empl ID	Account	Account Description	Expense Amount	Function Description
1		Person 1	PAY0405383	11/30/2022		50300	Research Faculty	1541.910	RsSch-Spon
2		Person 1	PAY0404302	11/15/2022		50300	Research Faculty	1541.910	RsSch-Spon
3		Person 1	PAY0403249	10/28/2022		50300	Research Faculty	576.680	RsSch-Spon
4		Person 1	PAY0402270	10/14/2022		50300	Research Faculty	576.680	RsSch-Spon

**Results**

**Notify**    Need Help? Click Notify and send an email, that includes a hyperlink to the Project Summary Page.

Run Searches by Budget Line Items and People

Results

Results

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## PI Portal: Financial Documents

Click on the **Financial Documents Tab** and you can find reports and invoices submitted to the sponsor.

The screenshot shows the 'Financial Documents' tab selected in a navigation bar. Below the navigation bar, the page title is 'Financial Reports and Invoices'. The project details are: Project 500714, Project Start Date 08/01/2022, and End Date 07/31/2023. A table of attachments is displayed with the following data:

Description	File Name
1 Invoice 08/01/22 - 10/31/22	AWD00001127_GCAS-123405.pdf

Annotations include a red circle around the 'Financial Documents' tab, a red circle around the 'Attachments' header, a red circle around the first row of the table, a red arrow pointing to the file name 'AWD00001127\_GCAS-123405.pdf', a red arrow pointing to the 'Notify' button, and a red arrow pointing to the text 'Click on the hyperlink and open the Invoice pdf document'. A text box at the bottom right contains the instruction: 'Click on the hyperlink and open the Invoice pdf document'. A text box at the bottom left contains the instruction: 'Need Help? Click Notify and send an email, that includes a hyperlink to the Project Summary Page.'

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## PI Portal: Project Personnel Commitments

Click on the **Personnel Commitments Tab** and review Key Personnel and Faculty Time Commitments devoted to the Project.

Project Summary | Payroll Information | Transaction Detail | Financial Documents | **Personnel Commitments** | Print | New window | Help | Personalize

### Sponsored Project Effort Commitments

Award ID AWD00001127      Sponsor Award ID A22-0305-S001  
Project 500714      Project Start Date 08/01/2022      End Date 07/31/2023

Note: Key personnel effort reduction of 25% or more requires prior approval from the sponsor.      Effort is displayed as percentage of FTE.

Review Key Personnel Time Commitments  
Academic, Calendar, Summer Periods  
Direct Charge and Cost Shared

Emplid	Name	Empl Class	Key Personnel	Role	Start Date	End Date	Academic	Academic Cost Share	Calendar	Calendar Cost Share	Summer	Summer Cost Share
1	Person 1	12F	Y	Co-PI	08/01/2022	07/31/2023			50.00			
2	Person 2	09F	N	Faculty	08/01/2022	07/31/2023					17.00	
3	Person 3	12F	Y	Co-PI	08/01/2022	07/31/2023			30.00			

Need Help? Click Notify and send an email, that includes a hyperlink to the Project Summary Page.

Notify

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## PI Portal: Search Window

Search Window doubles as the  
Landing Page for Staff

Sponsored Summary

### PI Portal: Sponsored Project Search

**Search:**  
For example, search by the PS Award ID. Results will display All Active PS projects established under that PS Award ID

**Default Search is set to Active.**  
Toggle btw Active and All Projects (All = active, expired, closed)

PS Project #

Start Date Greater than or =

Project Manager (Last,First or Partial)

End Date Less than or =

PS Award ID

Project Status

All

Active and Expired up to 120 days ago

Award PI (Last,First or Partial)

Department

College

Sponsor Name

Sponsor Award ID (or Partial)

	Project Manager	PS Award	Project ID	Project Title	Status	Award PI	Award Title	Sponsor	Sponsor Award ID
1	Dombrowski, Kirk	AWD00001247	<a href="#">500925</a>	Administrative Support Projec	ACTIVE	Dombrowski, Kirk	Vermont Institute for Rural Partnerships (IFRP-VT)	National Inst Food Agriculture/NIFA/USDA	2023-70500-38913
2	Dombrowski, Kirk	AWD00001247	<a href="#">500929</a>	Participant Support Costs	ACTIVE	Dombrowski, Kirk	Vermont Institute for Rural Partnerships (IFRP-VT)	National Inst Food Agriculture/NIFA/USDA	2023-70500-38913
3	Dombrowski, Kirk	AWD00001247	<a href="#">500930</a>	IRI Seed Grant Program	ACTIVE	Dombrowski, Kirk	Vermont Institute for Rural Partnerships (IFRP-VT)	National Inst Food Agriculture/NIFA/USDA	2023-70500-38913
4	Dombrowski, Kirk	AWD00001247	<a href="#">500931</a>	Advisory Board Meetings	ACTIVE	Dombrowski, Kirk	Vermont Institute for Rural Partnerships (IFRP-VT)	National Inst Food Agriculture/NIFA/USDA	2023-70500-38913
5	Dombrowski, Kirk	AWD00001247	<a href="#">500932</a>	Conference Support	ACTIVE	Dombrowski, Kirk	Vermont Institute for Rural Partnerships (IFRP-VT)	National Inst Food Agriculture/NIFA/USDA	2023-70500-38913
6	Dombrowski, Kirk	AWD00001247	<a href="#">500938</a>	IRI Seed Grant 1: TBD	ACTIVE	Dombrowski, Kirk	Vermont Institute for Rural Partnerships (IFRP-VT)	National Inst Food Agriculture/NIFA/USDA	2023-70500-38913