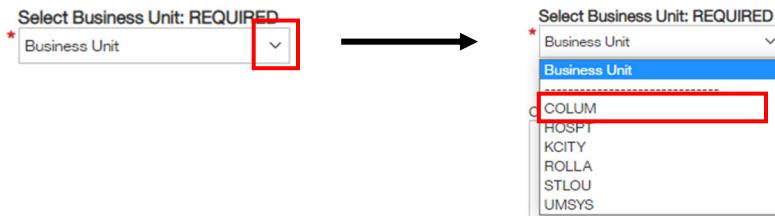


PI Grant and Contract Report - Prior Month

First, Select the Business Unit you are running the report for.

- **NOTE: You must select the Business Unit before any other filter**



Select Business Unit: REQUIRED

Business Unit

COLUM

HOSPT

KCITY

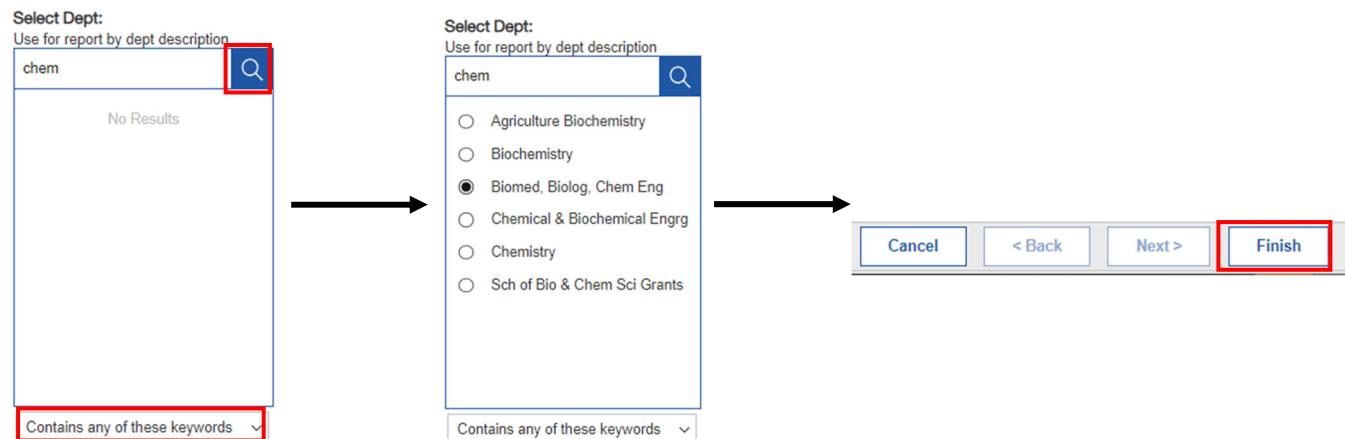
ROLLA

STLOU

UMSYS

There are 4 options for you to run/filter your report.

1. You can filter by department to run a single report that contains all PIs in that department and their projects.
 - a. Type department name and click the magnifying glass.
 - b. Select department you need and click the right arrow to move selection to Choices.
 - c. Then click Finish
 - d. TIP: Use the dropdown box at the bottom of each prompt to change search terms from 'Start with' to 'Contains'. This will allow you to expand your search beyond the exact names.
 - e. Note: If a PI has a project in a different department that project will not appear in the report



Select Dept:

Use for report by dept description

chem

No Results

Contains any of these keywords

Select Dept:

Use for report by dept description

chem

Agriculture Biochemistry

Biochemistry

Biomed, Biolog, Chem Eng

Chemical & Biochemical Engrg

Chemistry

Sch of Bio & Chem Sci Grants

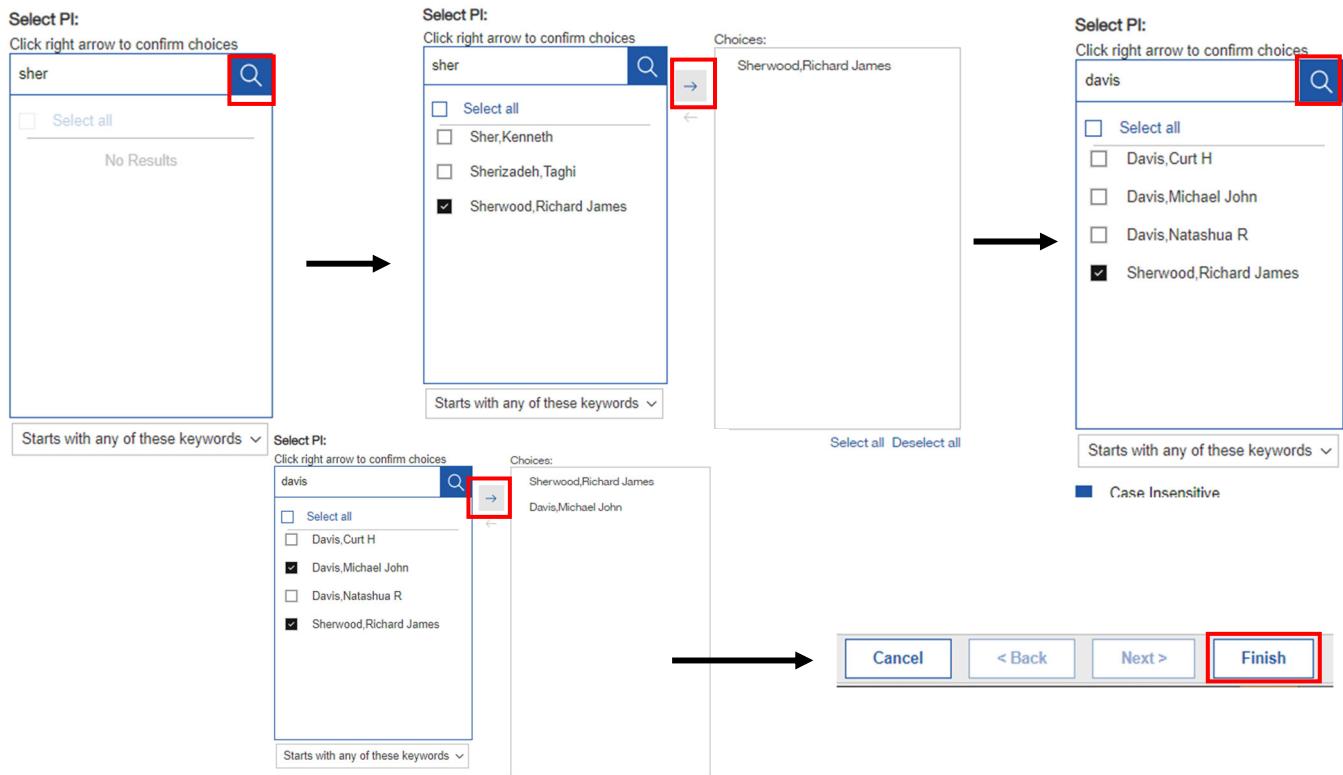
Contains any of these keywords

Cancel < Back Next > Finish

2. You can filter by a single or multiple PIs

- a. If you want all the projects for each PI, enter their last name. Search using the magnifying glass.
- b. Select the PI you need. Click the right arrow to move to choices
- c. Click Finish at the bottom

d. Note: You will need to search for, select, and move each PI individually to Choices before searching for a new PI



Starts with any of these keywords ▾

Select PI: Click right arrow to confirm choices

sher 

Select all

No Results

Starts with any of these keywords ▾

Select PI: Click right arrow to confirm choices

sher 

Select all

Sher,Kenneth

Sherizadeh,Taghi

Sherwood,Richard James

Choices: Sherwood,Richard James

Starts with any of these keywords ▾

Select PI: Click right arrow to confirm choices

davis 

Select all

Davis,Curt H

Davis,Michael John

Davis,Natashua R

Sherwood,Richard James

Choices: Sherwood,Richard James

Starts with any of these keywords ▾

Select PI: Click right arrow to confirm choices

davis 

Select all

Davis,Curt H

Davis,Michael John

Davis,Natashua R

Sherwood,Richard James

Choices: Sherwood,Richard James

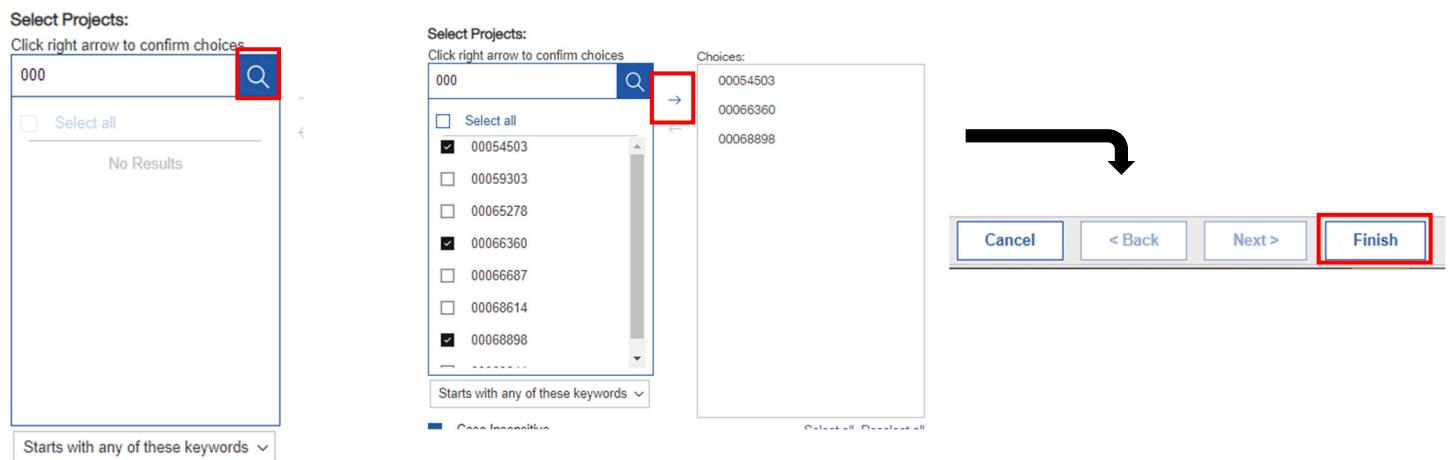
Starts with any of these keywords ▾

Case Insensitive

Cancel < Back Next > **Finish**

3. If you want to run a report for specific projects for selected PIs

- First, complete the PI selection process described above for the PIs of the projects you need
- Before Clicking Finish, move to Select Projects box, Type '000', and click the magnifying glass
- All open projects for selected PIs will appear. Select needed projects and click right arrow to move to Choices
- Click Finish



Starts with any of these keywords ▾

Select Projects: Click right arrow to confirm choices

000 

Select all

No Results

Starts with any of these keywords ▾

Select Projects: Click right arrow to confirm choices

000 

Select all

00054503

00059303

00065278

00066360

00066687

00068614

00068898

Choices: 00054503

00066360

00068898

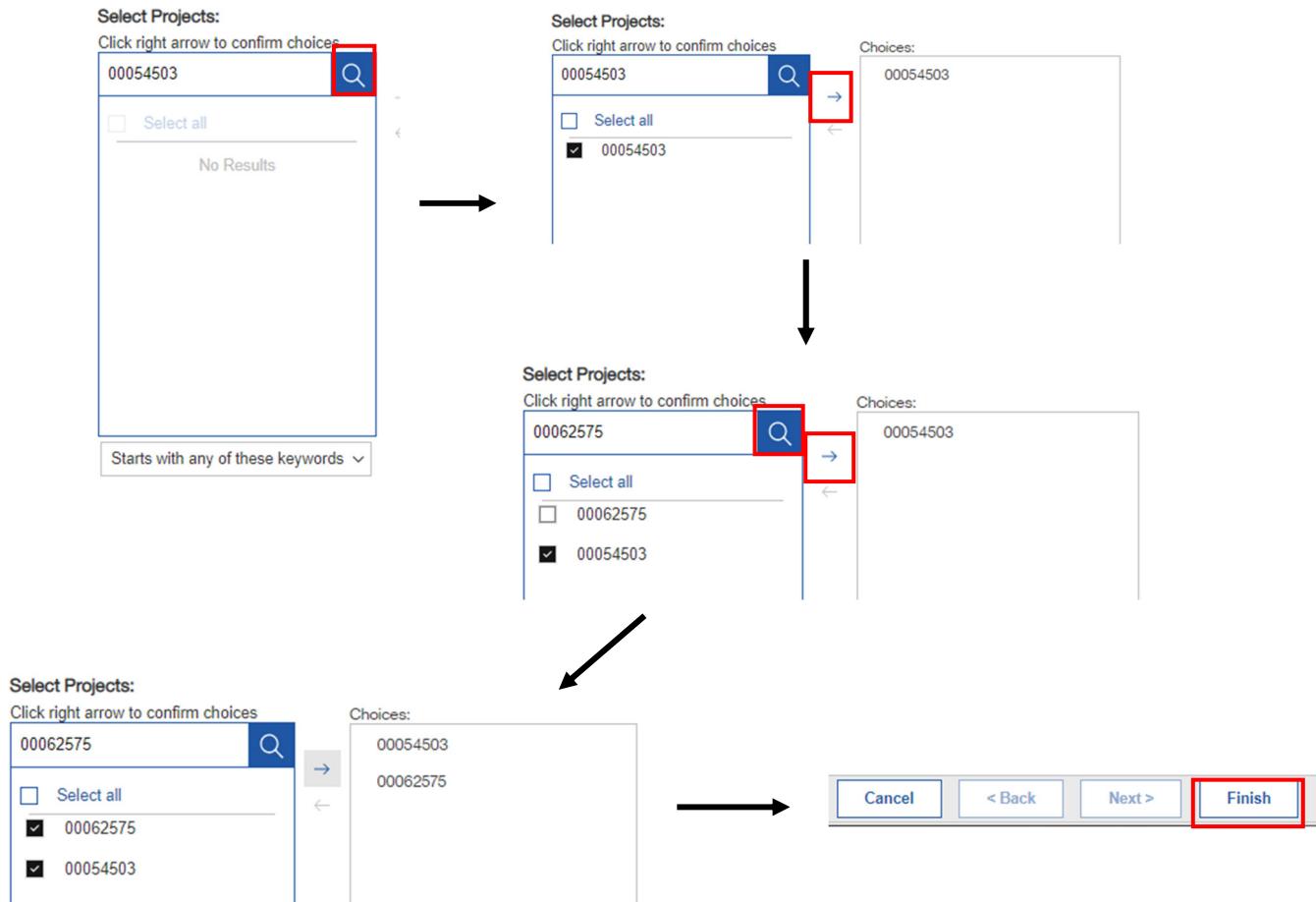
Starts with any of these keywords ▾

Case Insensitive

Cancel < Back Next > **Finish**

4. If you only want to see output for a specific project numbers, you can type in the project number in the Select Project box. Search by clicking the magnifying glass, select, and move to Choices

- Note: You will need to search for, select, and move each project individually to Choices before searching for a new project
- Then click Finish





PI Grant and Contract Report - Pick Dates

1. Filter report using one of the options described above.
2. Click on the 'FROM:' Date Text Box and Enter start date for transactions in MM/DD/YYYY format
3. Click on the 'TO:' Date Text Box and Enter final date for transactions in MM/DD/YYYY format
4. Click Finish at the bottom

Enter Transaction Dates: REQUIRED

From:

To:

Enter Transaction Dates: REQUIRED

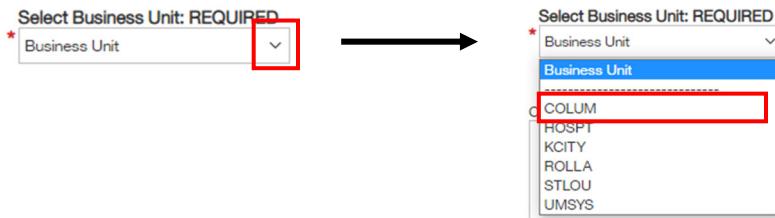
From:

To:

The diagram illustrates the process flow. It starts with the 'Enter Transaction Dates: REQUIRED' screen on the left, which has 'From' and 'To' date fields. An arrow points from this screen to the 'Enter Transaction Dates: REQUIRED' screen on the right, which also has 'From' and 'To' date fields. A final arrow points from the right screen down to the 'Finish' button on the bottom navigation bar.

PI Log Report – Dept Non-Reviewed

1. First, Select the Business Unit you are running the report for.
 - **NOTE: You must select the Business Unit before any other filter**



2. Next, either type in the Dept Node in the Select Department Search field, or start typing the department name in the Select Department Description field.
 - a. Click the magnifying glass to search
 - b. Select the department you want
 - c. Click the Right Arrow to move to choices
 - d. You do have the ability to select multiple departments

Dept Node

Select Department

- Before Clicking Finish at the bottom, click the Right Arrow to move Selections to Choices

Selections:

🔍

Select all

No Results

Starts with any of these keywords ▼

Case Insensitive
 Select all
 Deselect all
 Case Insensitive

Dept Name

Select Department Description

- Before Clicking Finish at the bottom, click the Right Arrow to move Selections to Choices

Selections:

🔍

Select all

No Results

Starts with any of these keywords ▼

Select all
 Deselect all
 Case Insensitive

- Tip: Update the search terms in the drop down before the search box, to search by 'Contains' rather than 'Starts with'



3. Click Finish at the bottom to run the report





PI Grant and Contract Report for Depts – with Link

- We recommend running this report to email, so the report can be easily sent directly to the PI, or to you and forwarded to the PI with additional information as need. Find the report to run as normal then:

1. Click the Ellipsis on the far right

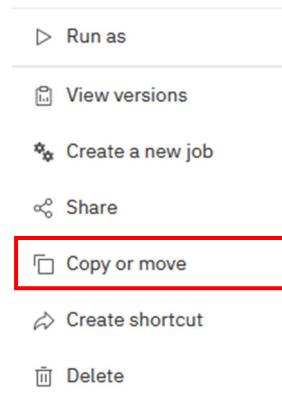
Search

PI Compliance Report for Depts - with Link

50 Results

PI Compliance Report for Depts - with Link
Team content > * UMC Reports > ... > PI Compliance **...**

2. Click Copy/Move



3. Click the folder in the top left to access your My content folder, then Click Copy to. DO NOT click Move To

Select a destination

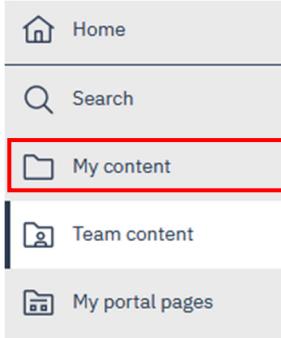
My content

- PI Compliance Report for Depts - with Link
- Report view of PI Compliance Distribution Report
- Report view of PI Compliance Report - Pick Dates
- Report view of PI Compliance Report - Prior Month

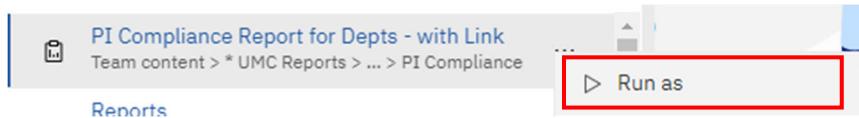
Destination: My content

Copy to **Move** **Cancel**

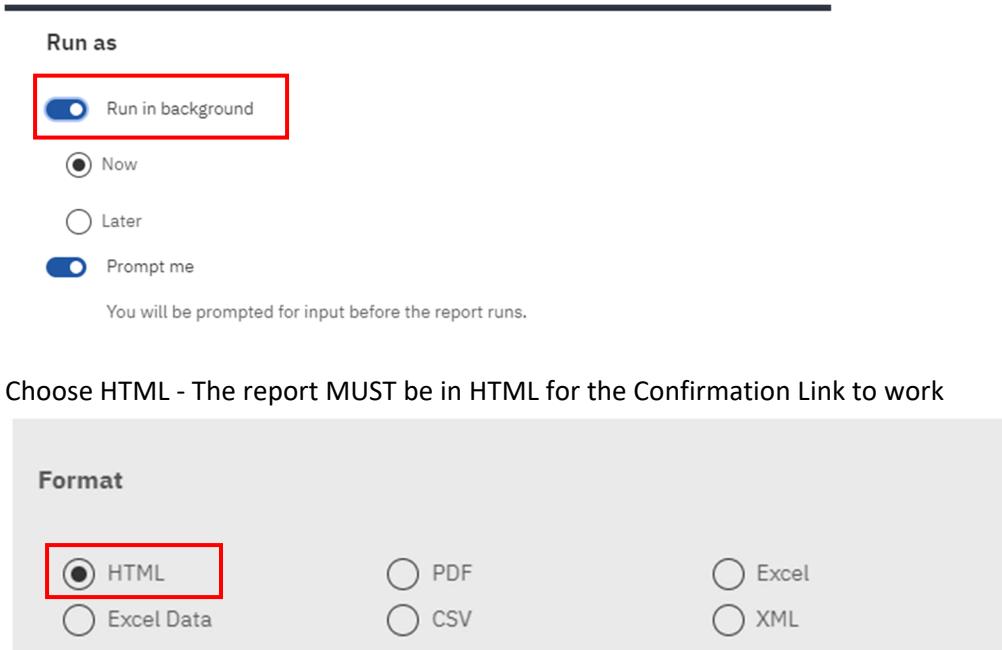
4. Click your My Content Folder in the far upper left corner of the screen



5. Find the report, Click Run As:



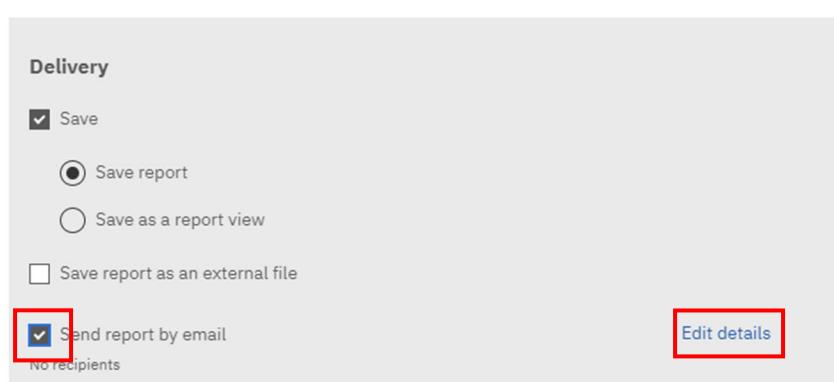
6. Click Run in background



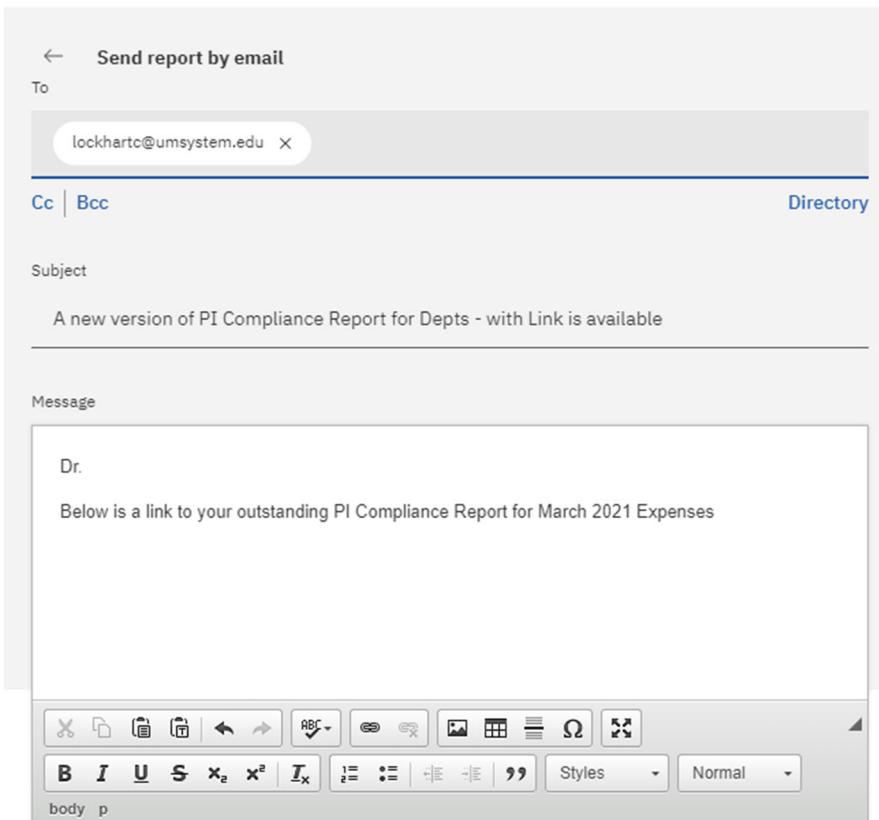
7. Choose HTML - The report MUST be in HTML for the Confirmation Link to work



8. Choose send report by email and click edit details



9. Enter the email addresses the report link needs to be sent in the 'To' field, Update the Subject Line if necessary, and add whatever you would like the email to say in the Message field



10. Click RUN at the very bottom





11. First, Enter the PI's Last Name, in the Select PI field. Click the magnifying glass

Select PI:

Click magnifying glass to search

Enter PI Last Name

No Results

Starts with any of these keywords

Case Insensitive

12. Select the PI Name for which you need the report

13. Click the Month of Expenses the PI needs to Review

- You can only run 1 month at a time

Select Month of Expenses:

January 2021

February 2021

14. Click Finish at the bottom to run the report

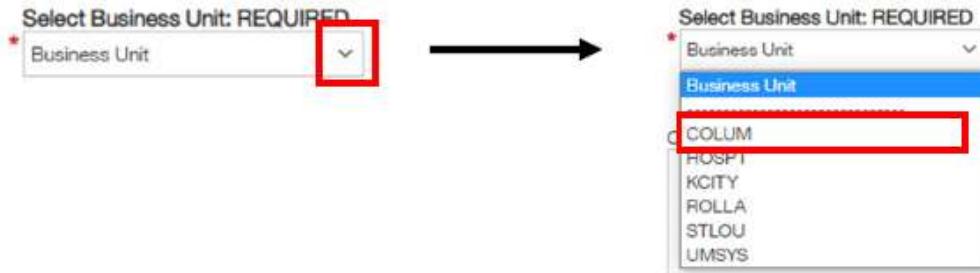


15. The report will appear in the receivers' inbox in a couple of minutes, generally takes 5 but could take up to 15

PI Log Report – OSPA Project Search

First, Select the Business Unit

NOTE: You must select the Business Unit before any other filter



There are 3 options you can select to run/filter the report.

NOTE: These filters are optional

1. You can filter by a single PI
 - a. If you want all the projects for each PI, enter their last name. Search using the magnifying glass.
 - b. Select the PI you need.

Enter PI:

🔍

- Smith,Ann
- Smith,Cassandra Mezines
- Smith,Charles J
- Smith,Emily Hoffman
- Smith,Jeffrey D
- Smith,Joseph D
- Smith,Matthew J
- Smith,Randall Darby
- Smith,Ryan
- Smith,Taylor Edward

Starts with any of these keywords ▼

Case Insensitive

2. If you want to run a report for specific projects

- a. Before Clicking Finish, move to Select Projects box, Type '000', and click the magnifying glass
- b. Select the Project by selecting the radio button

Enter Project:

000

00000463
00019246
 00020862
00021408
00022114
00022822
00025438
00028100
00028105
00028106

Starts with any of these keywords

Case Insensitive

3. Click the month of expenses the PI needs to Review
 - a. You can only run 1 month at a time

Select Month of Expenses:

* 