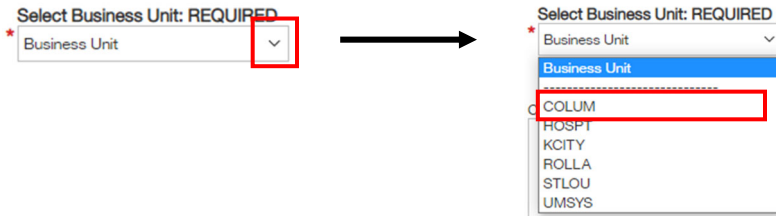


PI Grant and Contract Report - Prior Month

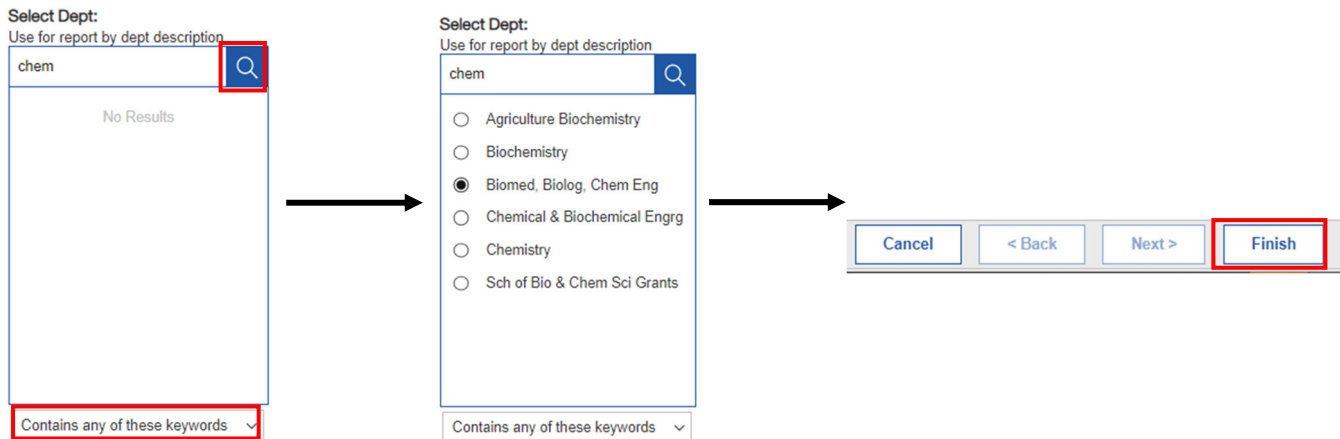
First, Select the Business Unit you are running the report for.

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



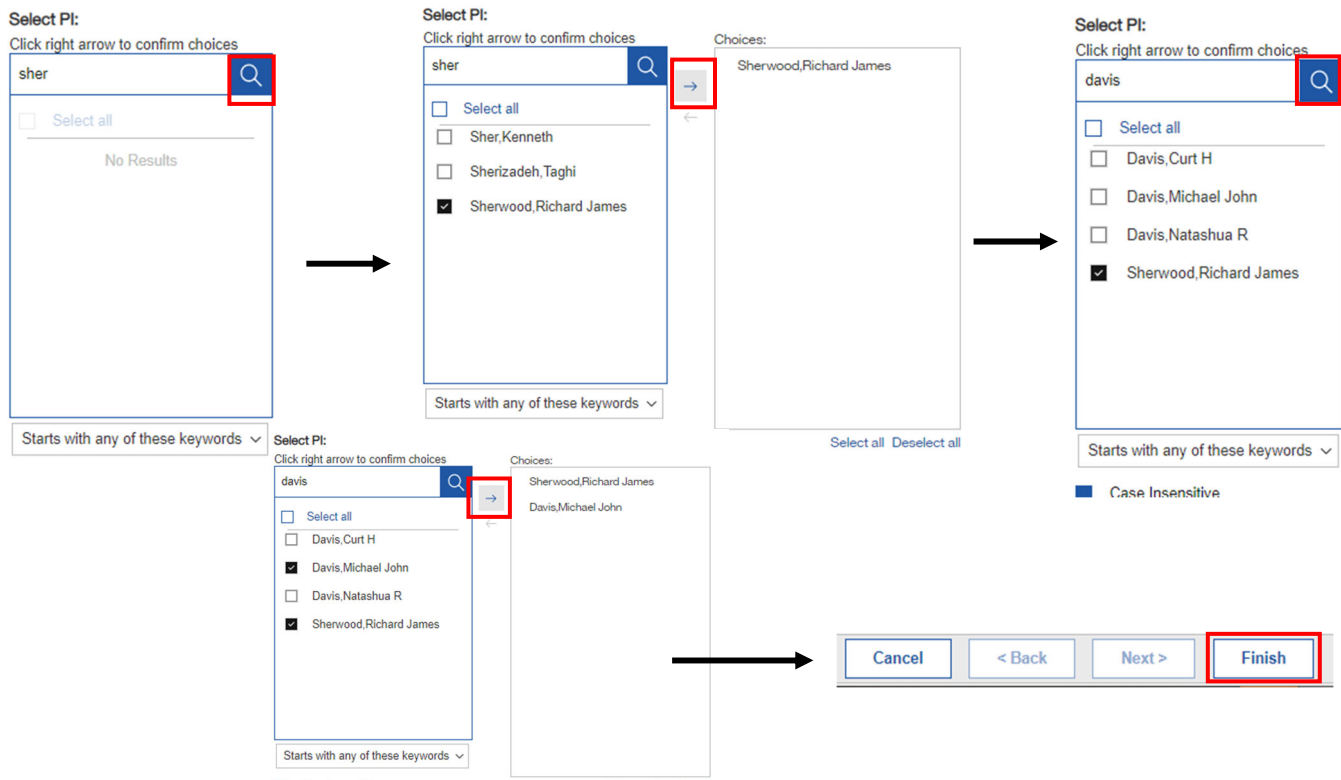
There are 4 options for you to run/filter your report.

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

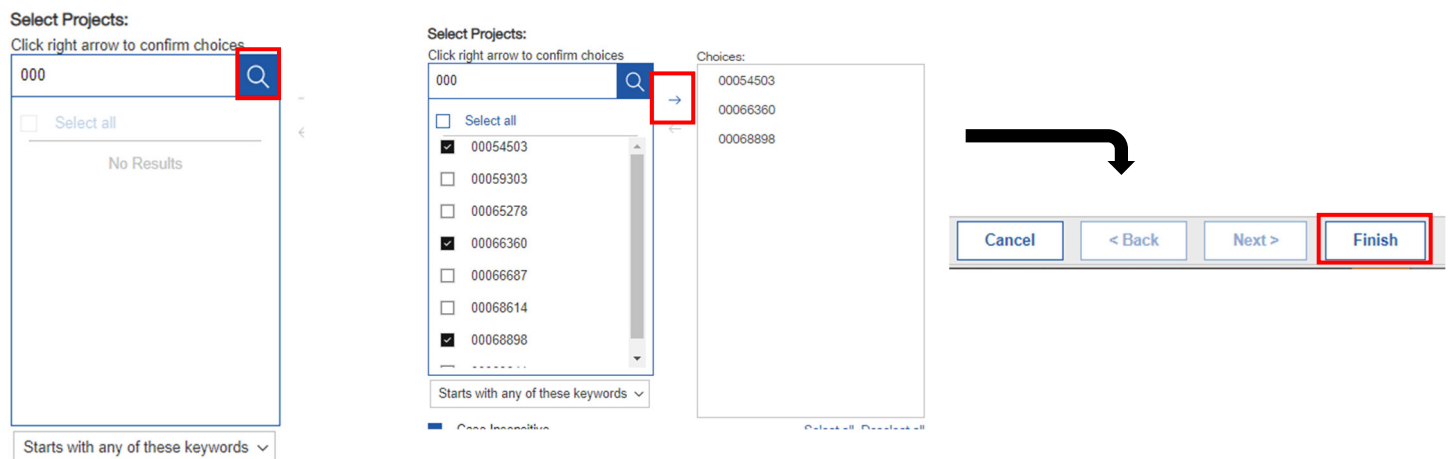


2. You can filter by a single or multiple PIs
 - a. If you want all the projects for each PI, enter their last name. Search using the magnifying glass.
 - b. Select the PI you need. Click the right arrow to move to choices
 - c. Click Finish at the bottom

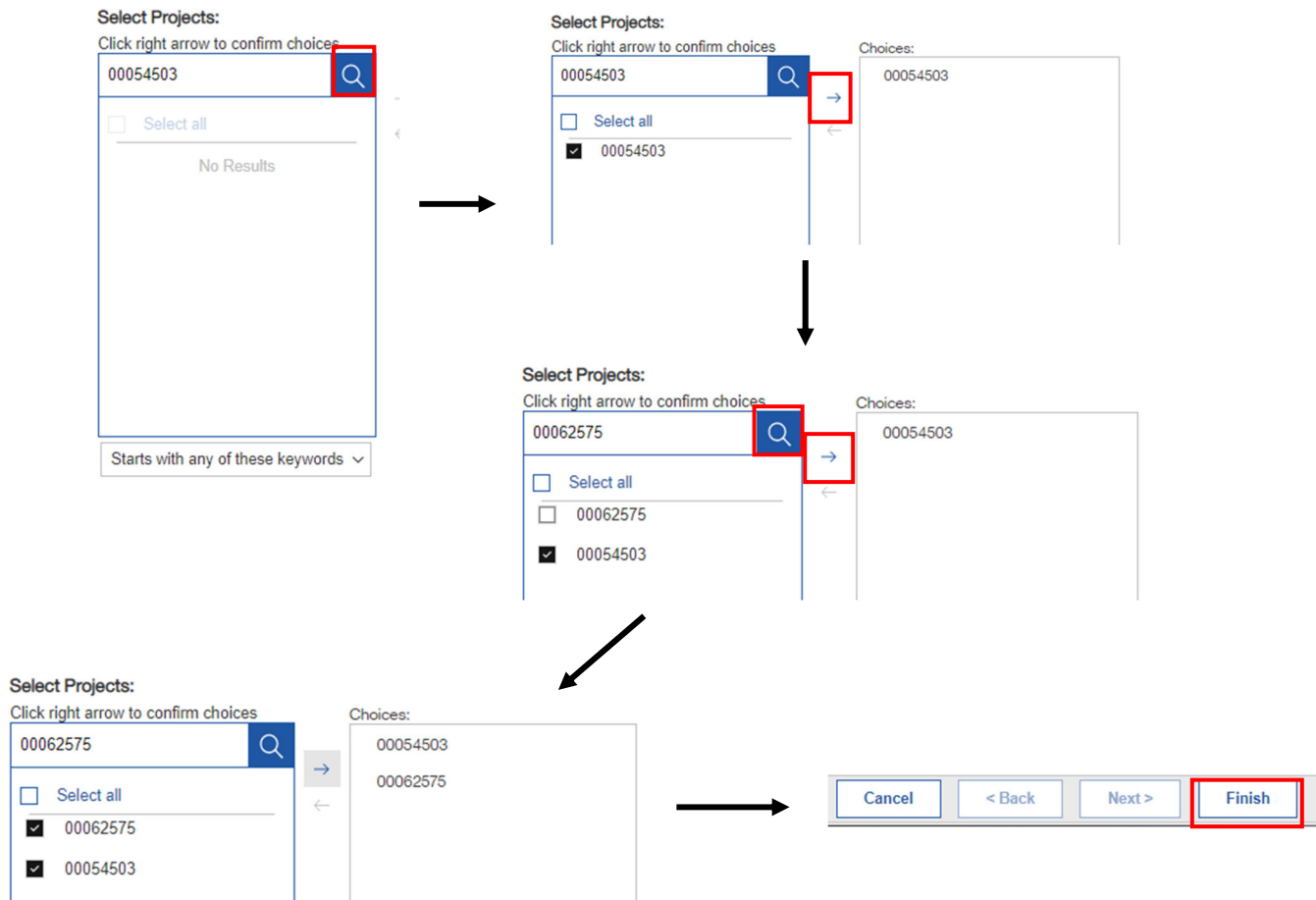
- d. Note: You will need to search for, select, and move each PI individually to Choices before searching for a new PI



- 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

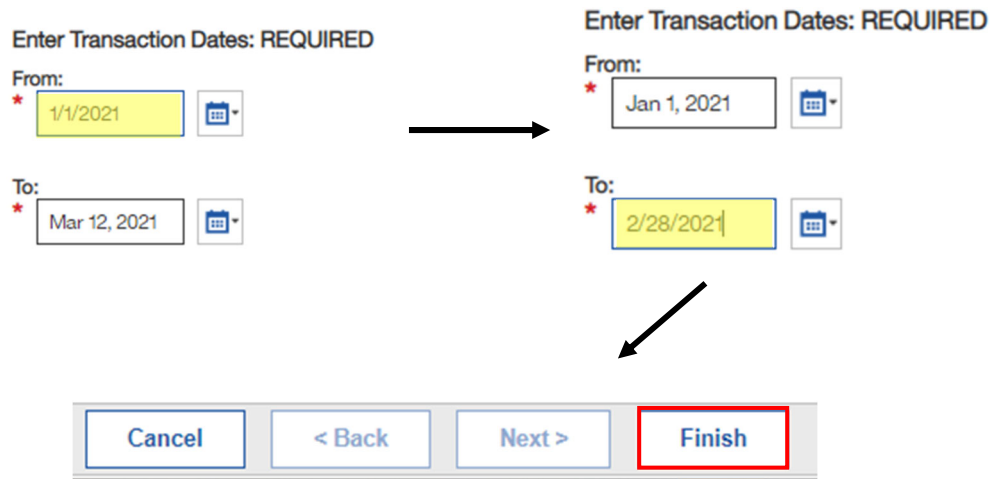


4. If you only want to see output for a specific project numbers, you can type in the project number in the Select Project box. Search by clicking the magnifying glass, select, and move to Choices
- Note: You will need to search for, select, and move each project individually to Choices before searching 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





The diagram illustrates the process of entering transaction dates in a report prompt. It shows two states of the form, connected by a horizontal arrow indicating a sequence of steps.

Initial State (Left):

- Title: Enter Transaction Dates: REQUIRED
- From: * 
- To: * 

Final State (Right):

- Title: Enter Transaction Dates: REQUIRED
- From: * 
- To: * 

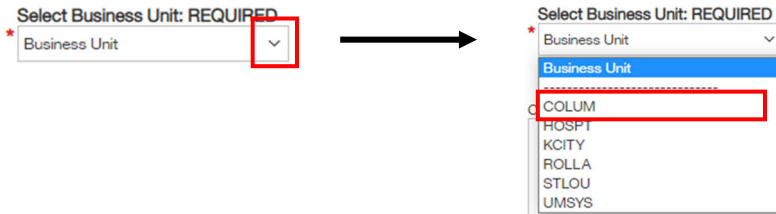
A horizontal arrow points from the initial state to the final state. A diagonal arrow points from the final state down to the navigation buttons.

Navigation Buttons:

- Cancel
- < Back
- Next >
- Finish** (highlighted with a red border)

PI Log Report – Dept Non-Reviewed

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

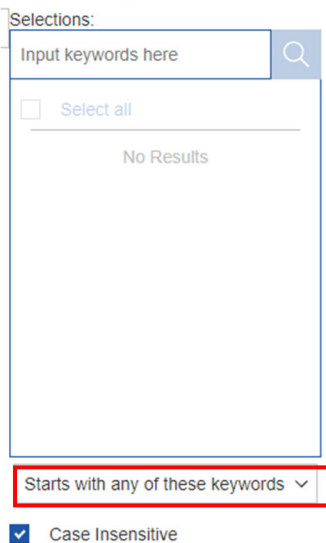


- Next, either type in the Dept Node in the Select Department Search field, or start typing the department name in the Select Department Description field.
 - Click the magnifying glass to search
 - Select the department you want
 - Click the Right Arrow to move to choices
 - You do have the ability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

Dept Node

Select Department

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



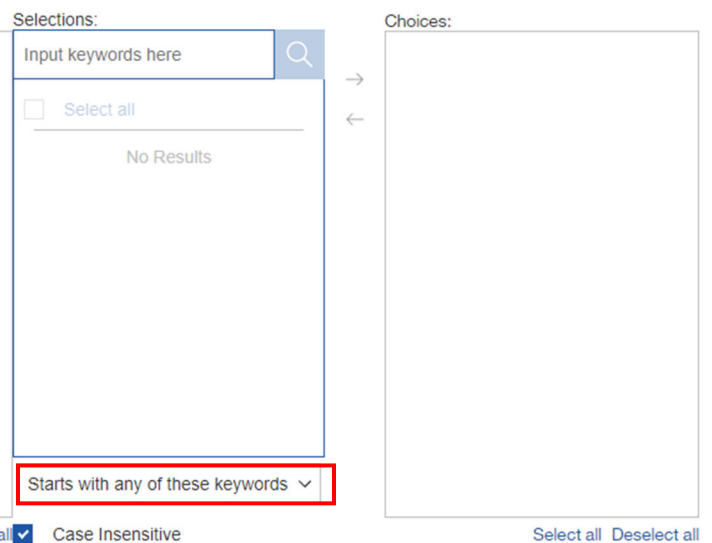
Starts with any of these keywords ▾

☒ Case Insensitive

Dept Name

Select Department Description

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

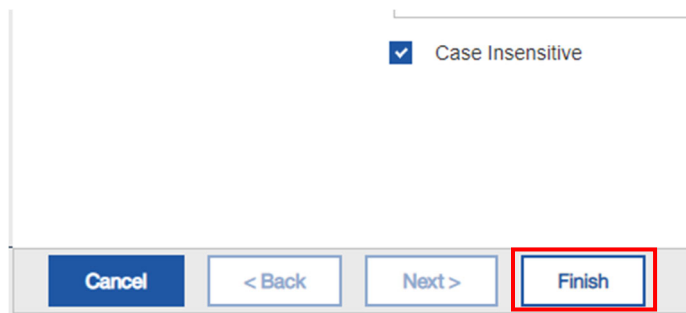


Starts with any of these keywords ▾

☒ 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



A screenshot of a software dialog box for report generation. At the top, there is a horizontal line. Below it, on the right side, is a checked checkbox labeled "Case Insensitive". At the bottom of the dialog, there is a row of four buttons: "Cancel" (dark blue), "< Back" (light blue), "Next >" (light blue), and "Finish" (light blue). The "Finish" button is highlighted with a red rectangular border.

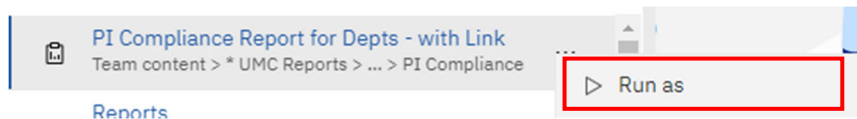
PI Grant and Contract Report for Depts – with Link

- 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:

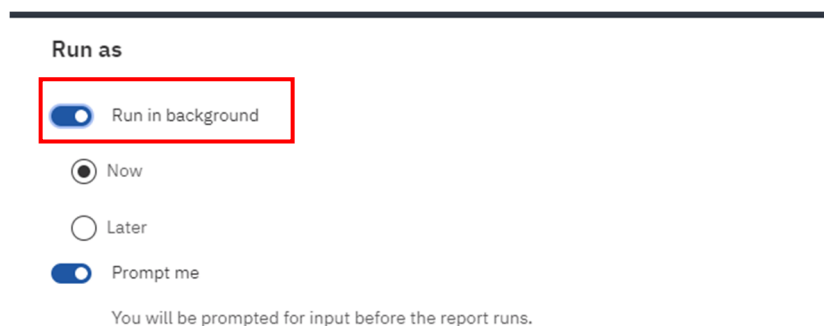
1. Click **Team Content** Folder in the far upper left corner of the screen



2. Find the report, Click Run As:



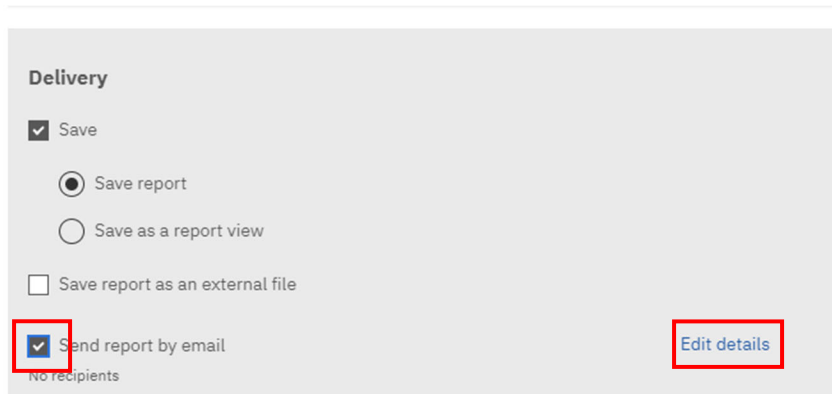
3. Click Run in background



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



- Choose send report by email and click edit details



Delivery

☒ Save

☒ Save report

☐ Save as a report view

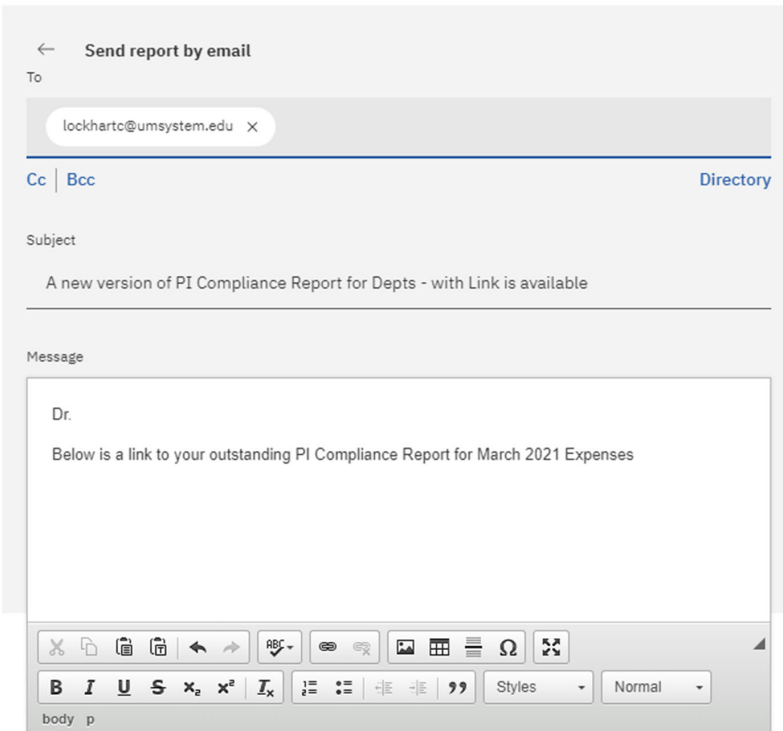
☐ Save report as an external file

☒ Send report by email

[Edit details](#)

No recipients

- 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



← Send report by email

To

lockhartc@umsystem.edu X

Cc | Bcc [Directory](#)

Subject

A new version of PI Compliance Report for Depts - with Link is available

Message

Dr.

Below is a link to your outstanding PI Compliance Report for March 2021 Expenses

body p

- Click Include Link

- Click RUN at the very bottom

Include the following with my message

☒ Include link

☐ Attach report output

Cancel

Run

9. 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

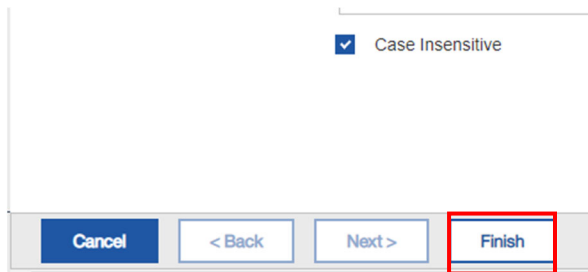
10. Select the PI Name for which you need the report
11. Click the Month of Expenses the PI needs to Review
- a. You can only run 1 month at a time

Select Month of Expenses:

 January 2021

February 2021

12. Click Finish at the bottom to run the report



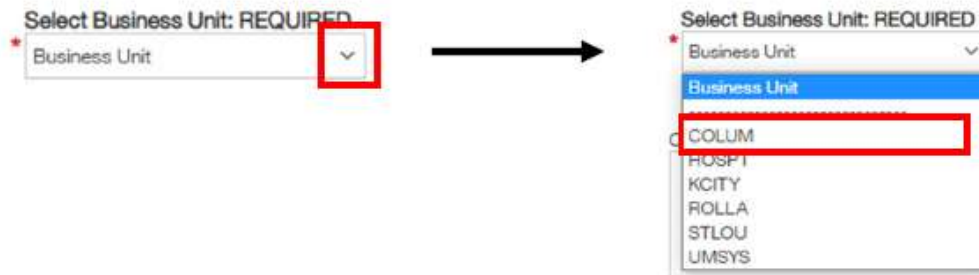
A screenshot of a web-based report generation interface. At the top, there is a checkbox labeled "Case Insensitive" which is checked. Below this, there is a horizontal bar containing four buttons: "Cancel", "< Back", "Next >", and "Finish". The "Finish" button is highlighted with a red rectangular border.

13. 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,Tyler 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:



☐ 00000463

☐ 00019246

☒ 00020862

☐ 00021408

☐ 00022114

☐ 00022822

☐ 00025438

☐ 00028100

☐ 00028105

☐ 00000000

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:

* 