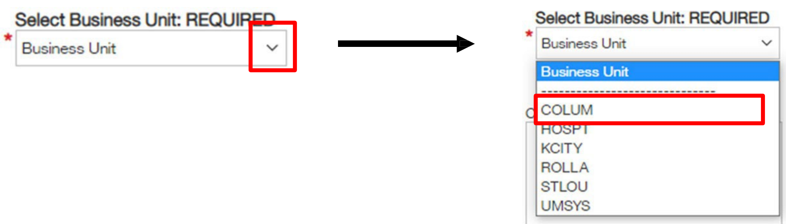
PI Grant and Contract Report - Prior Month

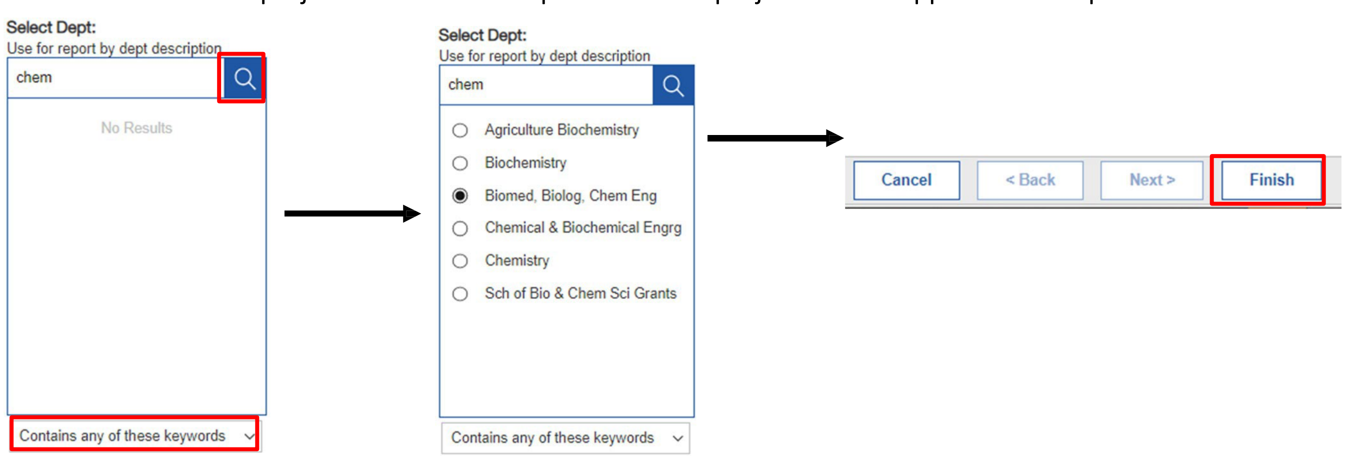
First, Select the Business Unit you are running the report for.

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



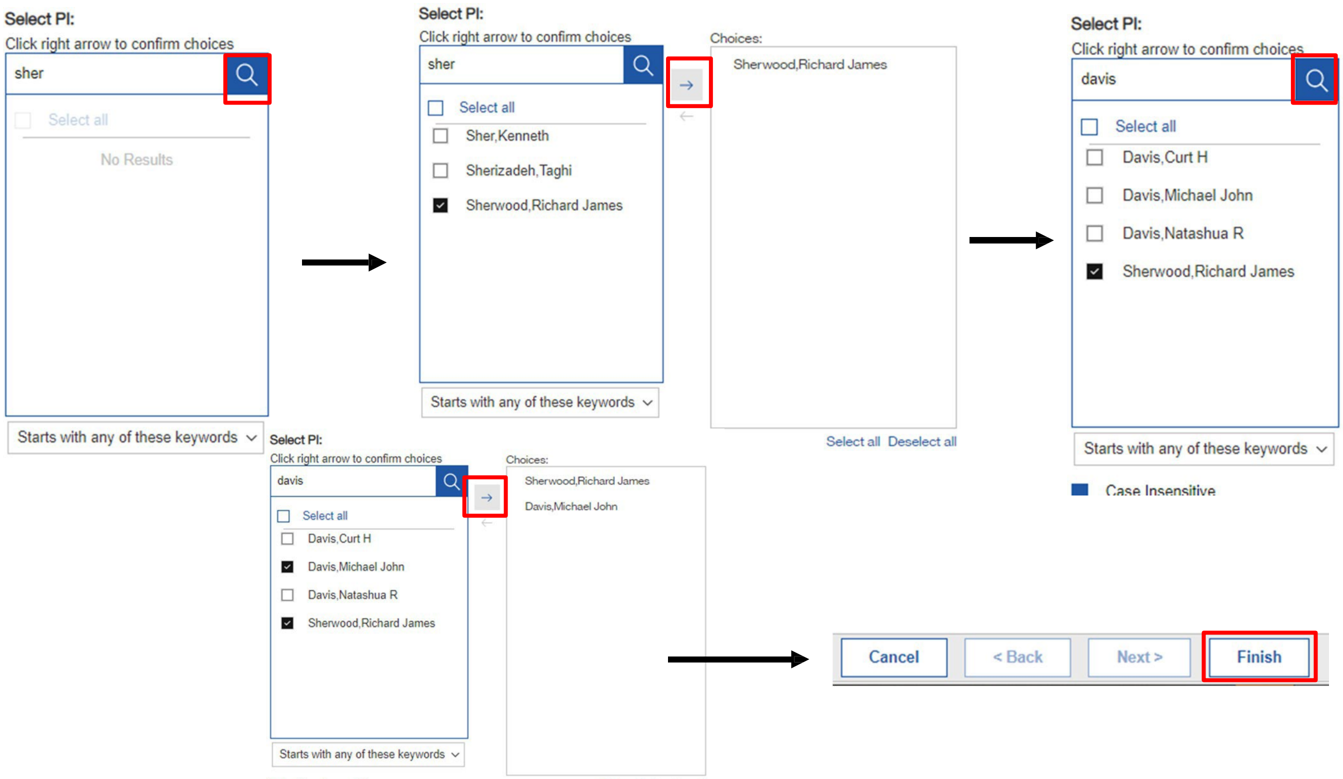
There are 4 options for you to run/filter your report.

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

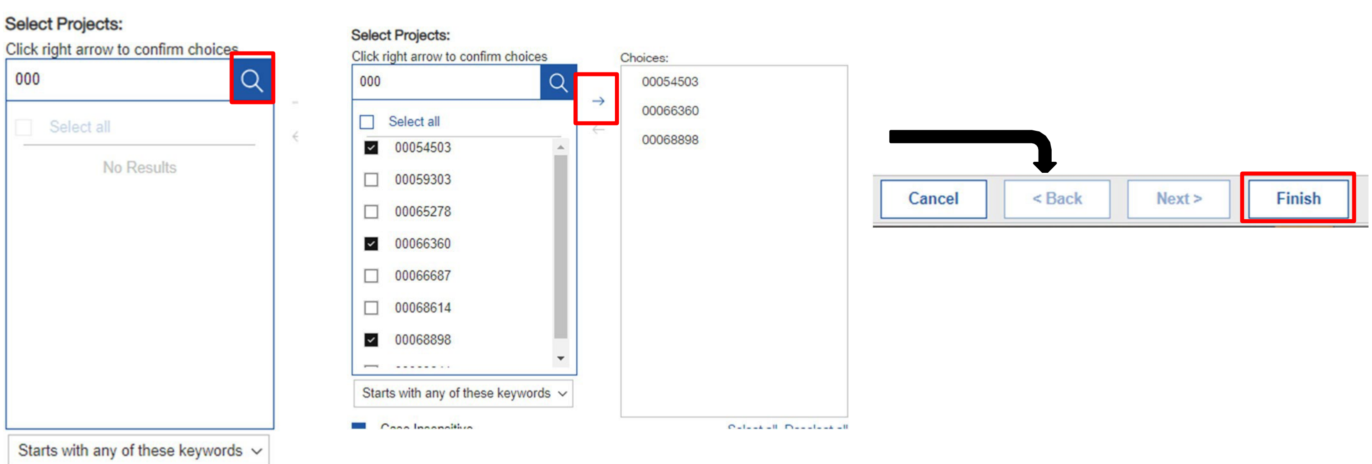


2. You can filter by a single or multiple PIs
    a. If you want all the projects for each PI, enter their last name. Search using the magnifying glass.
    b. Select the PI you need. Click the right arrow to move to choices
    c. Click Finish at the bottom

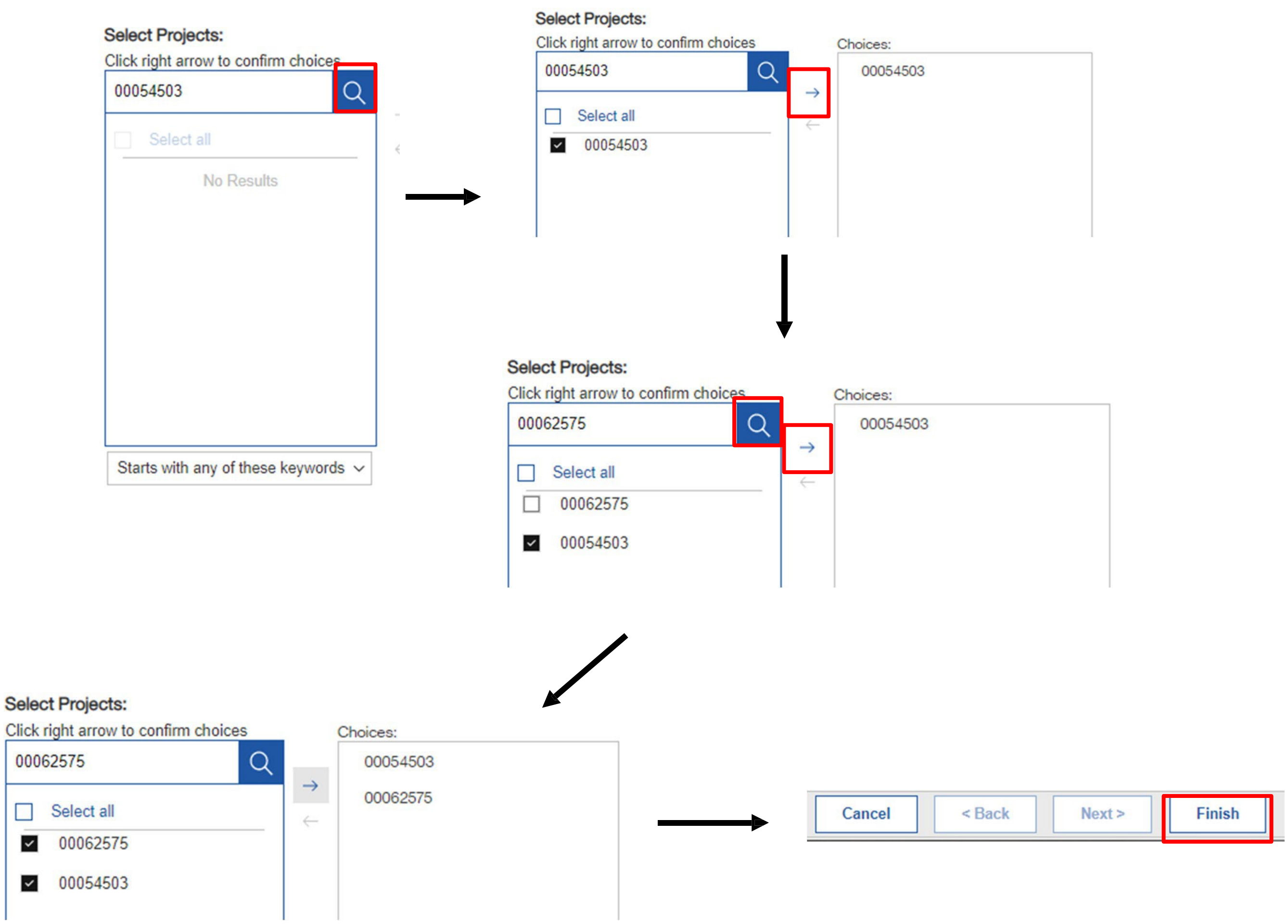
d. Note: You will need to search for, select, and move each PI individually to Choices before searching for a new PI



3. If you want to run a report for specific projects for selected PIs
    a. First, complete the PI selection process described above for the PIs of the projects you need
    b. Before Clicking Finish, move to Select Projects box, Type '000', and click the magnifying glass
    c. All open projects for selected PIs will appear. Select needed projects and click right arrow to move to Choices
    d. Click Finish

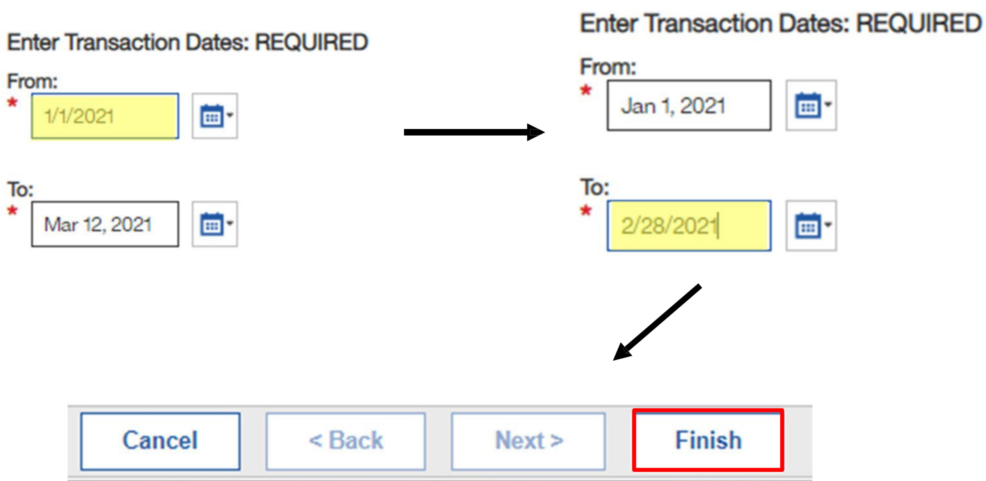


4. If you only want to see output for a specific project numbers, you can type in the project number in the Select Project box. Search by clicking the magnifying glass, select, and move to Choices
   a. Note: You will need to search for, select, and move each project individually to Choices before searching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



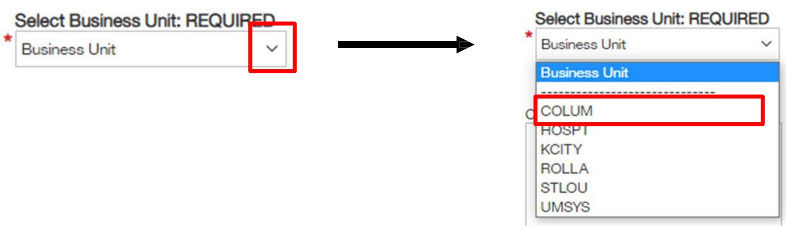
PI Grant and Contract Report - Pick Dates

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



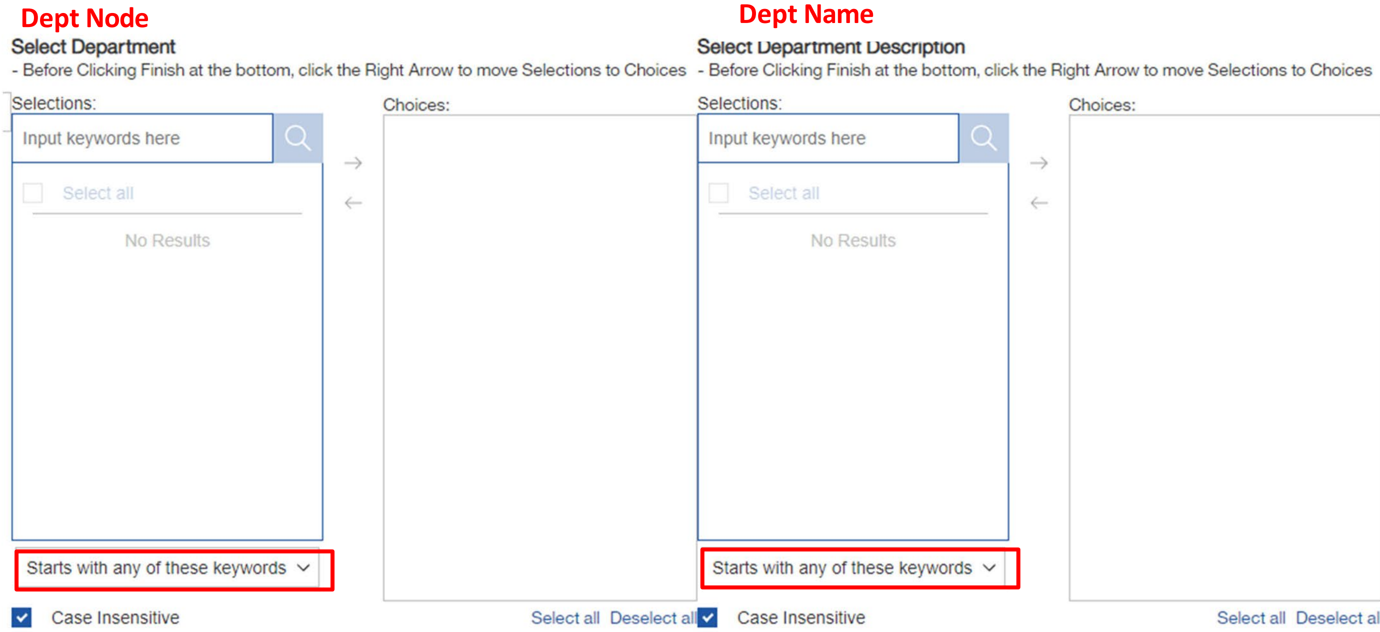
PI Log Report – Dept Non-Reviewed

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



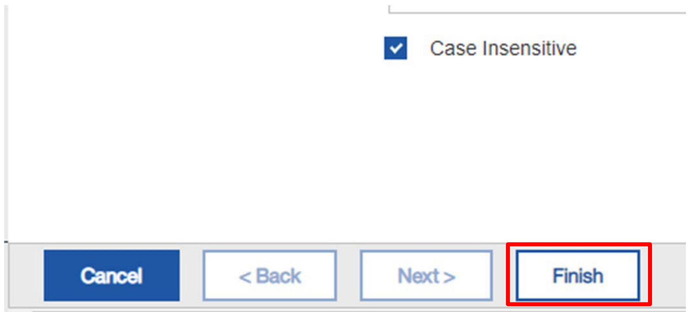
2. Next, either type in the Dept Node in the Select Department Search field, or start typing the department name in the Select Department Description field.
   a. Click the magnifying glass to search
   b. Select the department you want
   c. Click the Right Arrow to move to choices
   d. You do have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

Dept Node | Dept Name



** Tip: Update the search terms in the drop down before the search box, to search by ‘Contains’ rather than ‘Starts with’

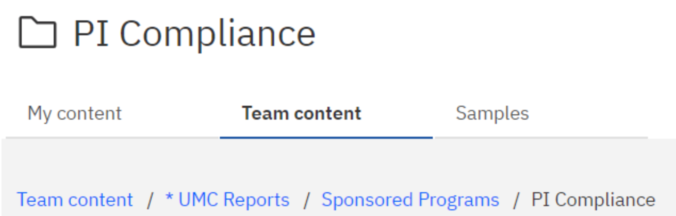
3. Click Finish at the bottom to run the report



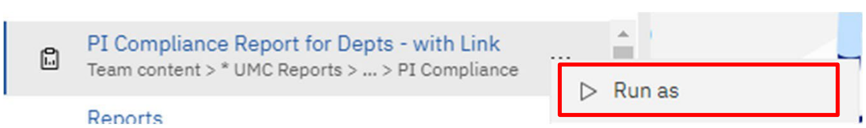
PI Grant and Contract Report for Depts – with Link

** 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. Navigate to PI Compliance Reports (as you will do for all Grant and Contract Reports)



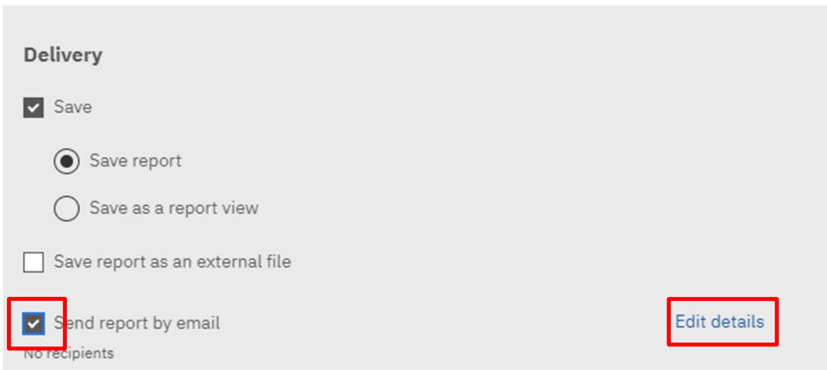
2. Find the report, Click ellipsis on the right to open Action menu then click Run as:



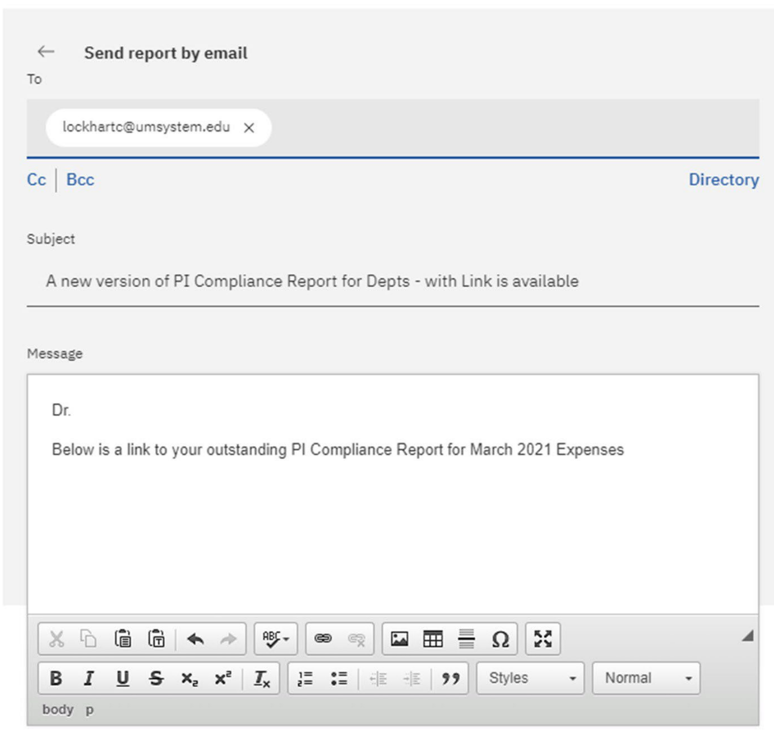
3. Click Run in background

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

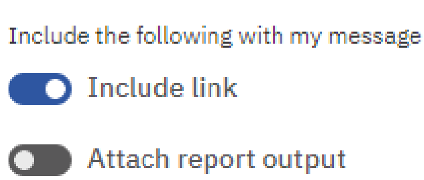
5. Choose send report by email and click edit details



6. Click Edit details, then 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

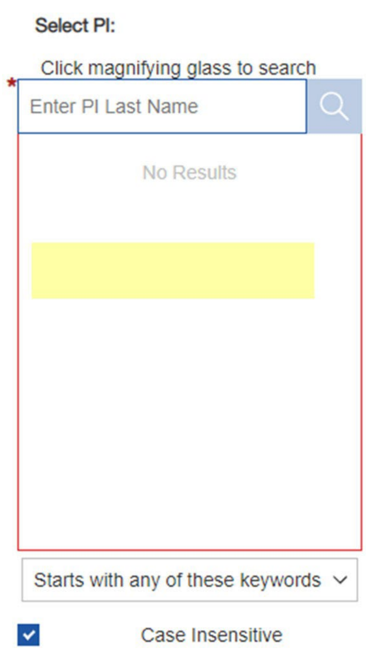


7. Click Include Link



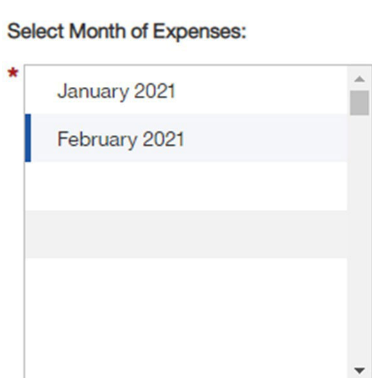
8. Click RUN at the very bottom

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

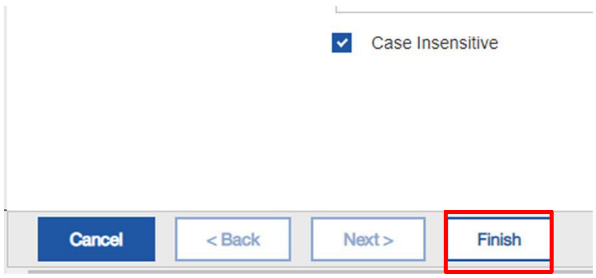


10. Select the PI Name for which you need the report

11. Click the Month of Expenses the PI needs to Review *** You can only run 1 month at a time ***



12. Click Finish at the bottom to run the report

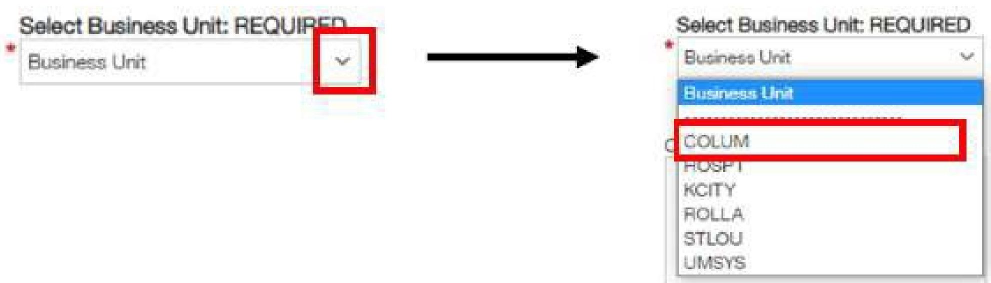


13. The report will appear in the receivers' inbox in a couple of minutes, generally takes 5 but could take up to 15

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.

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

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