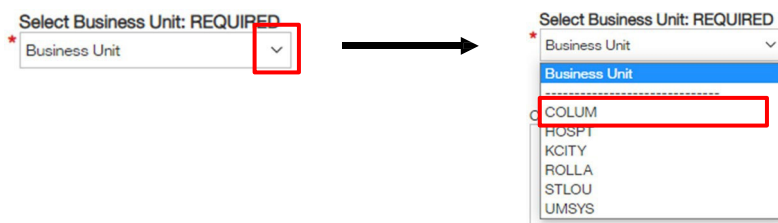


PI Grant and Contract Report - Prior Month

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

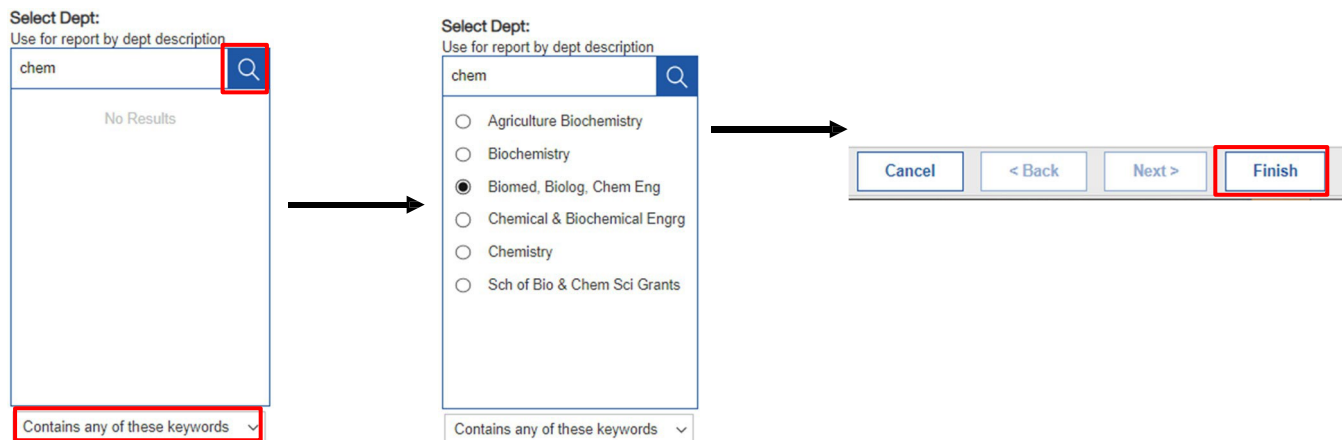
- **NOTE: You must select the Business Unit before any other filter**



The first screenshot shows a dropdown menu labeled 'Select Business Unit: REQUIRED' with a red box around the dropdown arrow. An arrow points to the second screenshot, which shows the same menu with the dropdown arrow clicked, revealing a list of business units: COLUM, HOSPI, KCITY, ROLLA, STLOU, and UMSYS. The 'COLUM' option is highlighted with a red box.

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

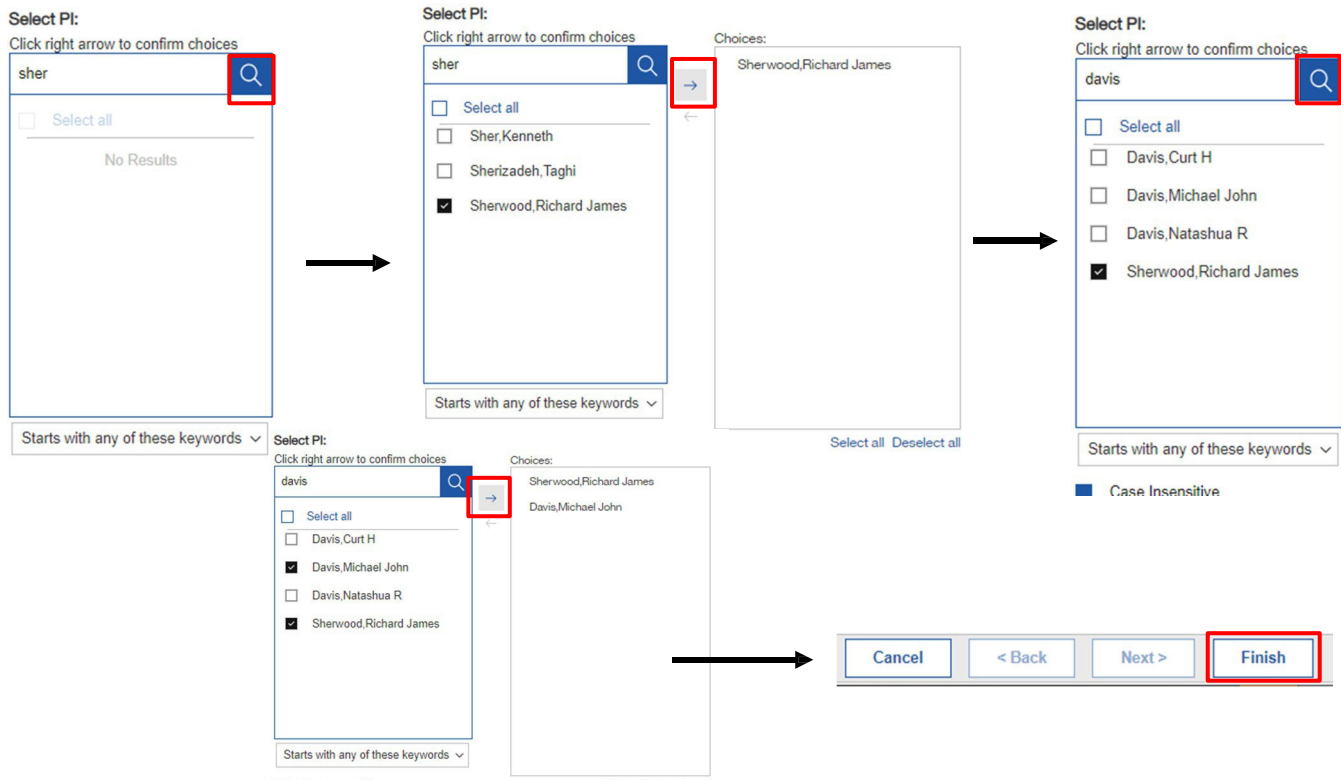
1. You can filter by department to run a single report that contains all PIs in that department and their projects.
 - a. Type department name and click the magnifying glass.
 - b. Select department you need and click the right arrow to move selection to Choices.
 - c. Then click Finish
 - d. TIP: Use 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



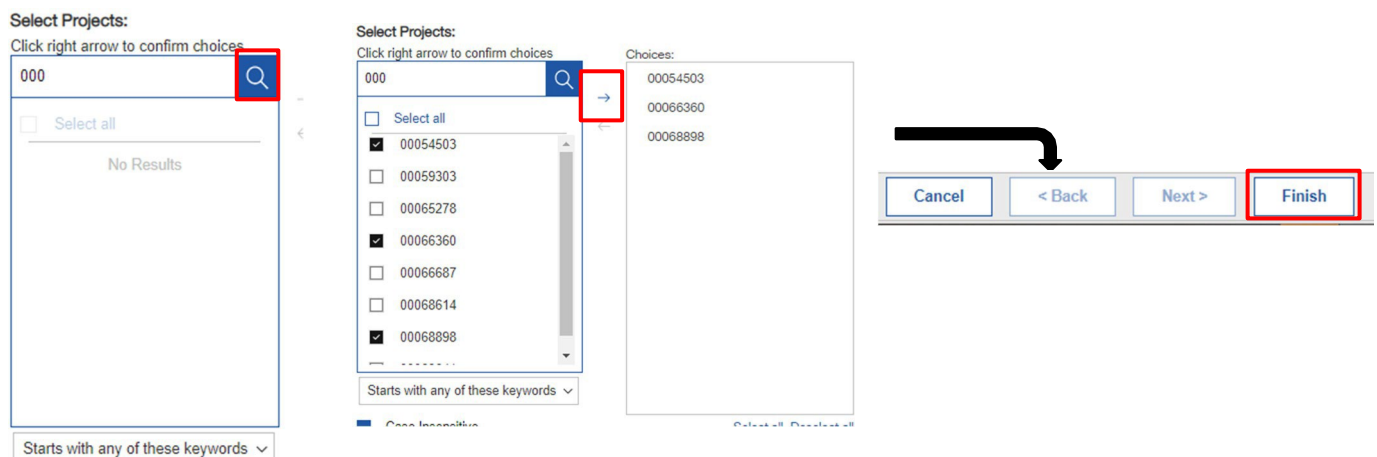
The first screenshot shows a search box labeled 'Select Dept: Use for report by dept description' with the text 'chem' entered. A magnifying glass icon is in the top right corner. A red box highlights the magnifying glass icon. An arrow points to the second screenshot, which shows the same search box with a list of departments below it: Agriculture Biochemistry, Biochemistry, Biomed, Biolog, Chem Eng (selected), Chemical & Biochemical Engrg, Chemistry, and Sch of Bio & Chem Sci Grants. A red box highlights the 'Biomed, Biolog, Chem Eng' option. An arrow points to the third screenshot, which shows a row of buttons: Cancel, < Back, Next >, and Finish. The 'Finish' button is highlighted with a red box.

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

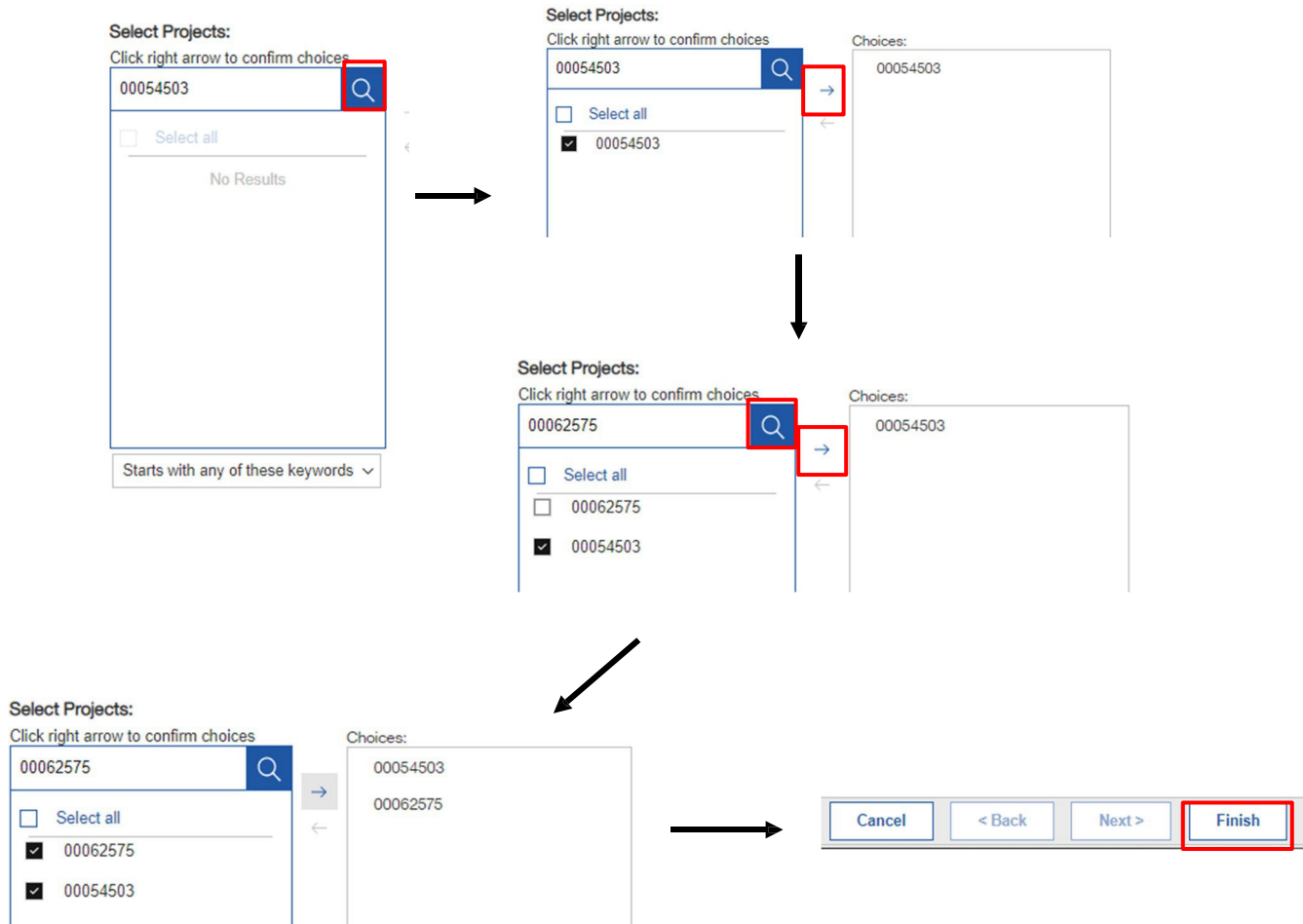
- d. Note: You will need to search for, select, and move each PI individually to Choices before searching for a new PI



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




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

Initial State (Left):

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

Final State (Right):

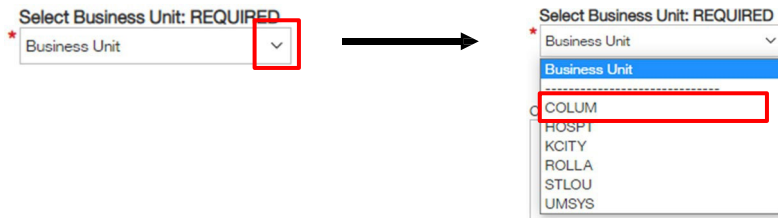
- Title: Enter Transaction Dates: REQUIRED
- From: * 
- To: * 

Navigation Buttons (Bottom):

- 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**

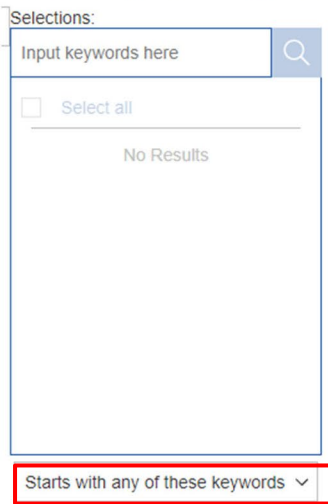


- Next, either type in the Dept Node in the Select Department Search field, or start typing the department name in the Select Department Description field.
 - Click the magnifying glass to search
 - Select the department you want
 - Click the Right Arrow to move to choices
 - You do have the ability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

Dept Node

Select Department

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

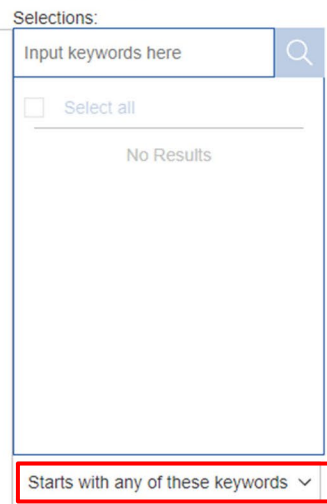


☒ Case Insensitive

Dept Name

Select Department Description

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



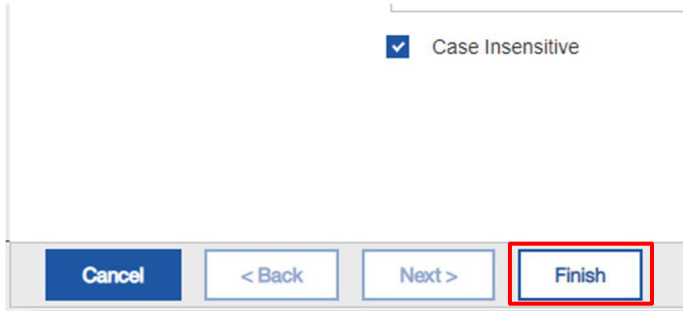
☒ Case Insensitive



Select all Deselect all

**** 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



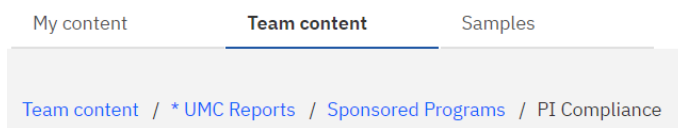
A screenshot of a software dialog box. At the top right, there is a checked checkbox labeled "Case Insensitive". At the bottom, there is a row of four buttons: "Cancel", "< Back", "Next >", and "Finish". The "Finish" button is highlighted with a red rectangular border.

PI Grant and Contract Report for Depts – with Link

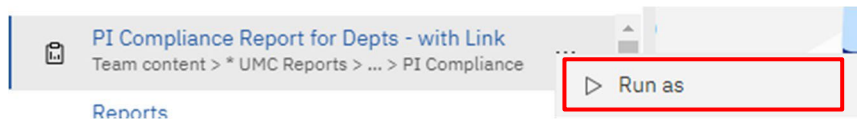
** We recommend running this report to email, so the report can be easily sent directly to the PI, or to you and forwarded to the PI with additional information as need. Find the report to run as normal then:

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

PI Compliance



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



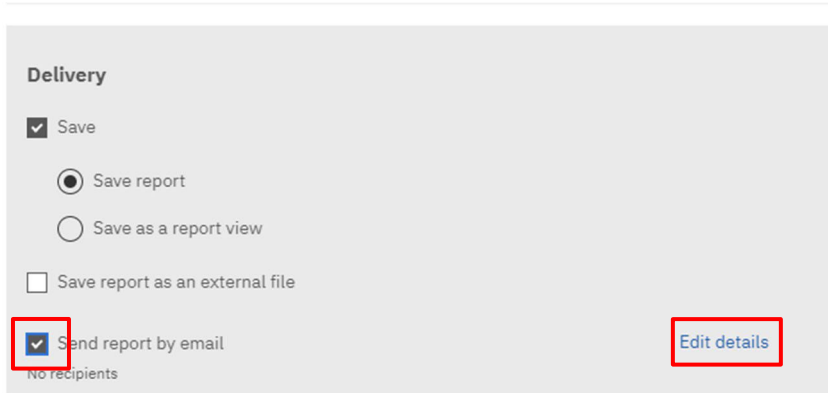
3. Click Run in background



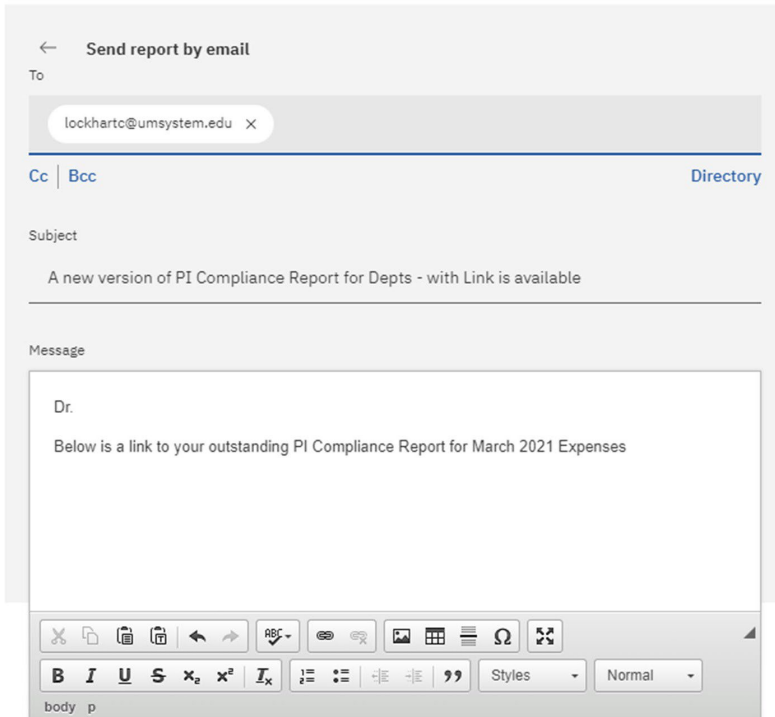
4. Choose HTML - The report MUST be in HTML for the Confirmation Link to work



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

Include the following with my message

☒ Include link

☐ Attach report output

8. Click RUN at the very bottom



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

A red rectangular box highlights the search results area, which currently displays 'No Results' and a yellow placeholder bar.

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 ****

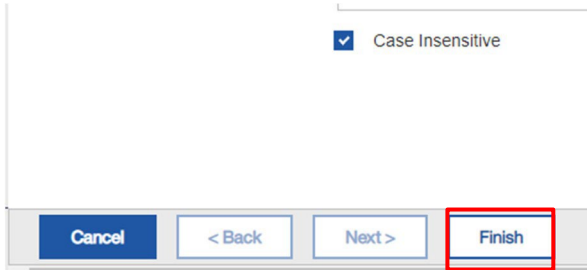
Select Month of Expenses:

 January 2021

February 2021

A dropdown menu is shown with 'January 2021' at the top and 'February 2021' selected and highlighted in blue. A red asterisk is to the left of the dropdown.

12. Click Finish at the bottom to run the report



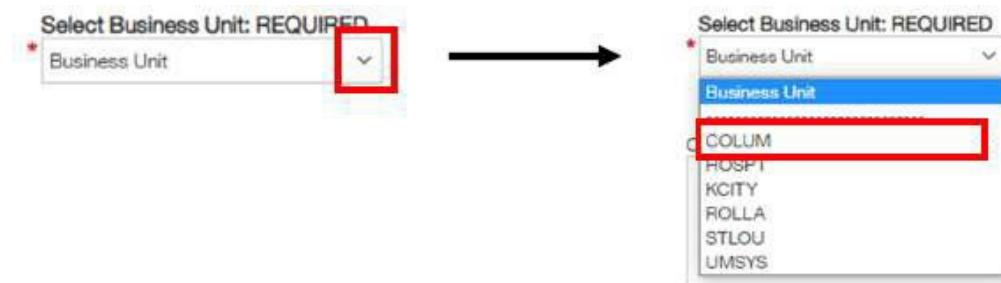
A screenshot of a software interface for generating a report. At the top, there is a checkbox labeled "Case Insensitive" which is checked. Below this, there is a row of four buttons: "Cancel" (dark blue), "< Back" (light blue), "Next >" (light blue), and "Finish" (light blue). The "Finish" button is highlighted with a red rectangular border.

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 Mezones
☐ Smith, Charles J
☐ Smith, Emily Hoffman
☐ Smith, Jeffrey D
☐ Smith, Joseph D
☐ Smith, Matthew J
☐ Smith, Randall Darby
☐ Smith, Ryan
☐ Smith, Todd Edward

☒ 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:



January 2021

February 2021