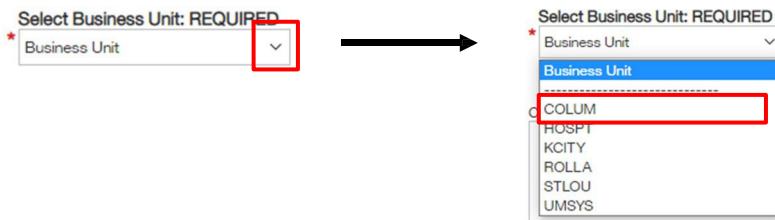


PI Grant and Contract Report - Prior Month

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

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



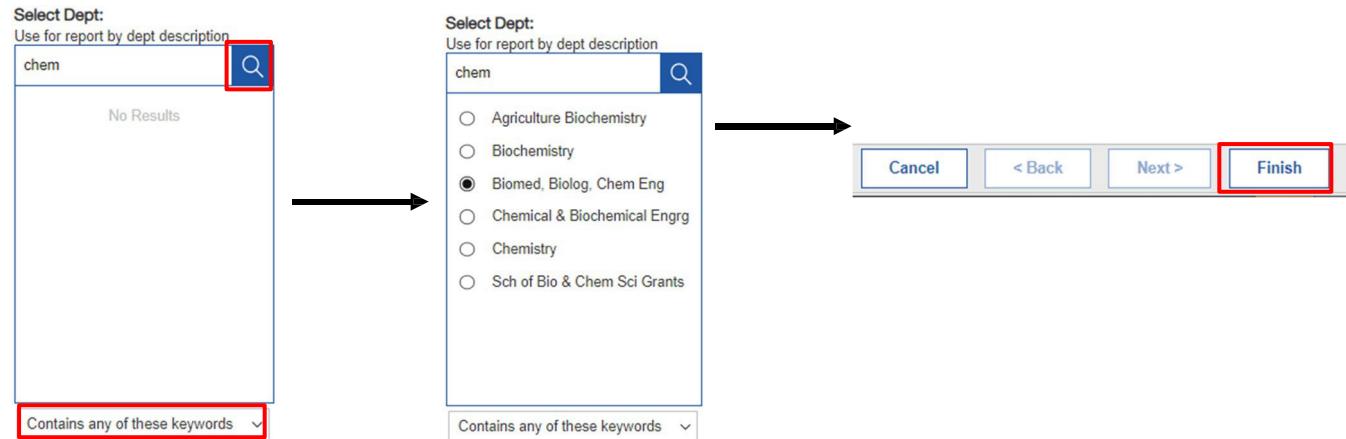
Select Business Unit: REQUIRED

Business Unit

COLUM

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

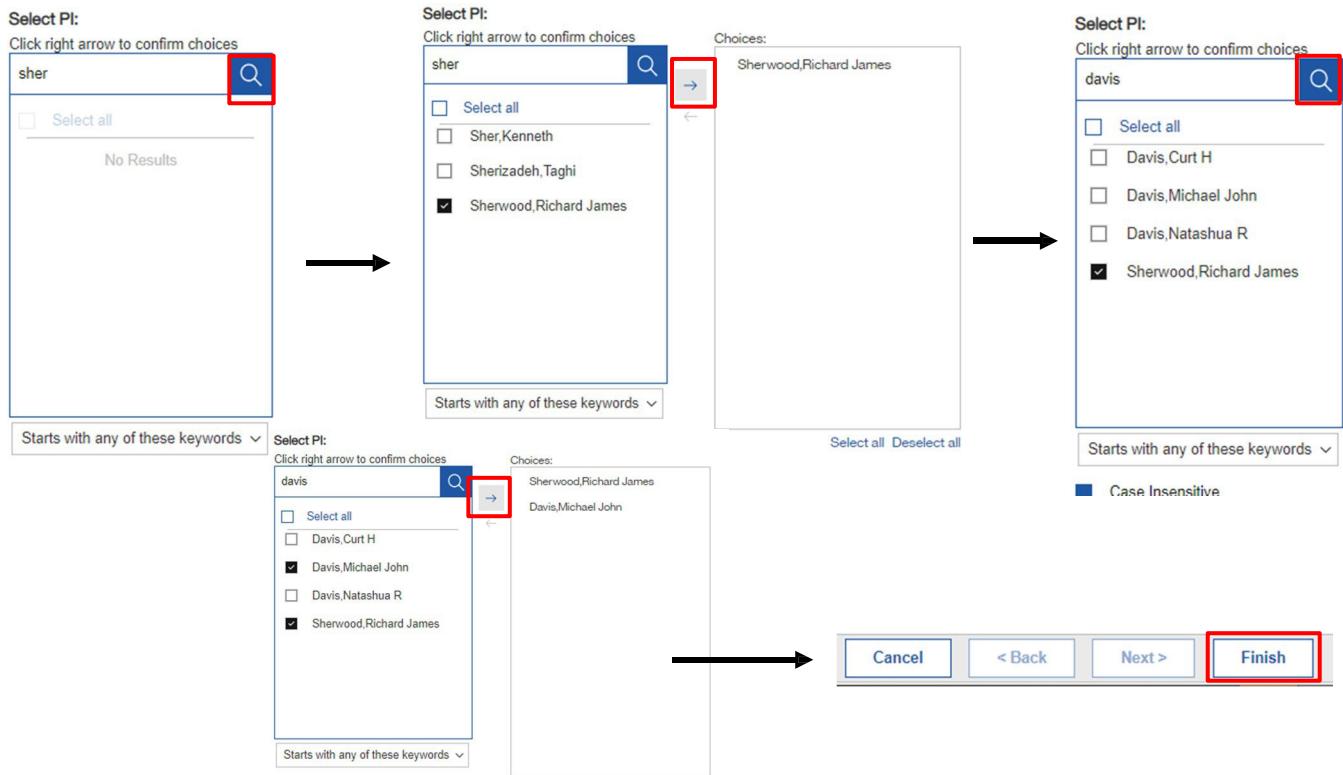
Agriculture Biochemistry
 Biochemistry
 Biomed, Biolog, Chem Eng
 Chemical & Biochemical Engrg
 Chemistry
 Sch of Bio & Chem Sci Grants

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



Select PI:
Click right arrow to confirm choices
sher 

Starts with any of these keywords

Select PI:
Click right arrow to confirm choices
sher 

Choices:
Sherwood,Richard James

Starts with any of these keywords

Select PI:
Click right arrow to confirm choices
davis 

Starts with any of these keywords

Select PI:
Click right arrow to confirm choices
davis 

Choices:
Sherwood,Richard James
Davis,Michael John

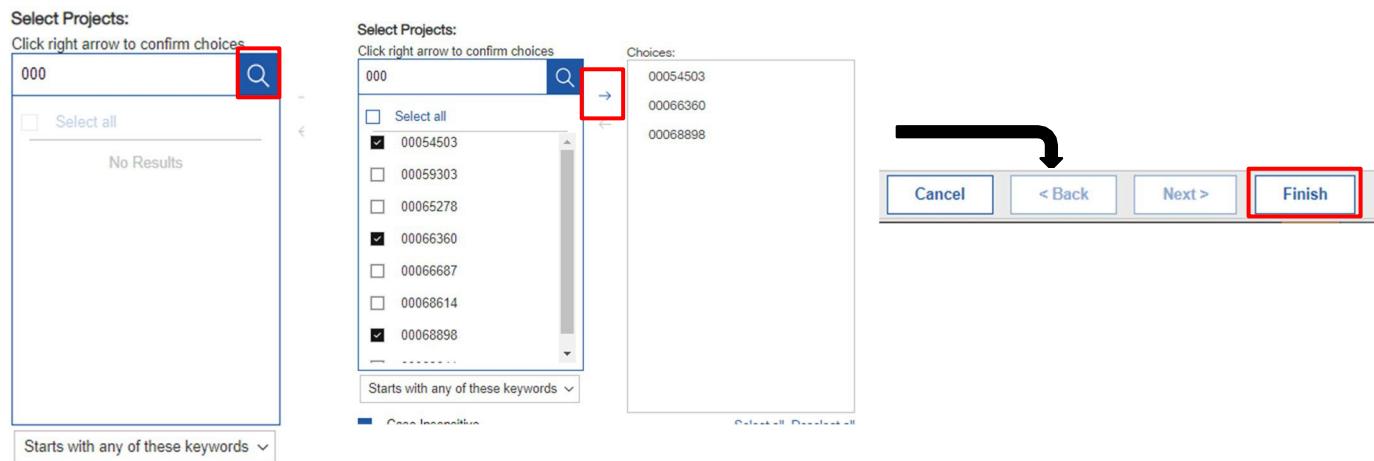
Starts with any of these keywords

Select all Deselect all

Cancel < Back Next > 

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



Select Projects:
Click right arrow to confirm choices
000 

Starts with any of these keywords

Select Projects:
Click right arrow to confirm choices
000 

Choices:
00054503
00066360
00068898

Starts with any of these keywords

Cancel < Back Next > 

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

Select Projects:
Click right arrow to confirm choices

00054503

Select all

No Results

Starts with any of these keywords ▾

Select Projects:
Click right arrow to confirm choices

00054503

Select all

00054503

Choices:
00054503

Select Projects:
Click right arrow to confirm choices

00062575

Select all

00062575

00054503

Choices:
00054503

Select Projects:
Click right arrow to confirm choices

00062575

Select all

00062575

00054503

Choices:
00054503
00062575

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: * 1/1/2021

To: * Mar 12, 2021

Enter Transaction Dates: REQUIRED

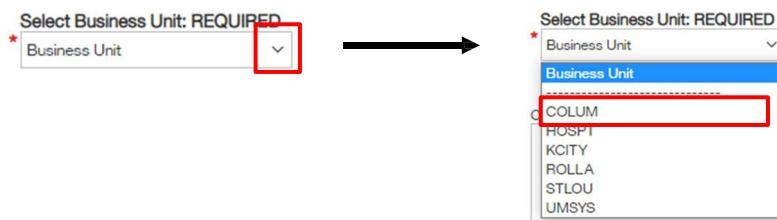
From: * Jan 1, 2021

To: * 2/28/2021



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

Dept Name

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

Selections:

Choices:

Selections:

Choices:

Starts with any of these keywords

Select all Deselect all Case Insensitive

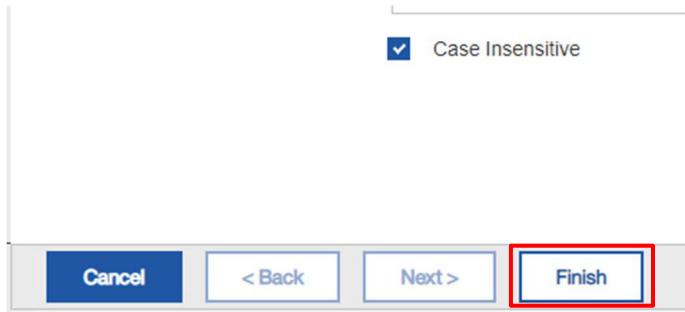
Starts with any of these keywords

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

PI Compliance

My content Team content Samples

Team content / * UMC Reports / Sponsored Programs / PI Compliance

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

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

Reports

Run as

3. Click Run in background

Run as

Run in background

Now

Later

Prompt me

You will be prompted for input before the report runs.

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

Format

HTML

PDF

Excel

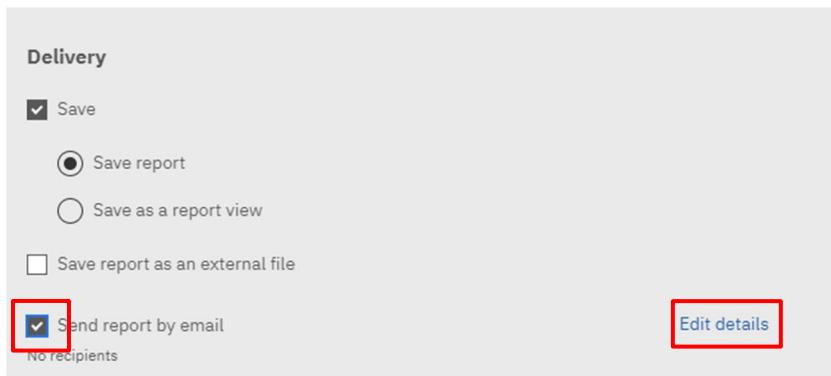
Excel Data

CSV

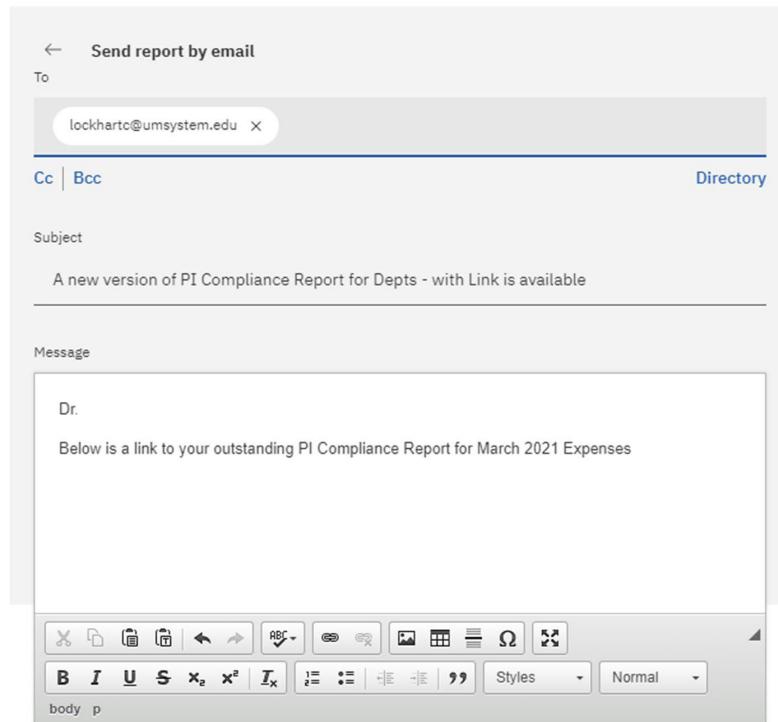
XML



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

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 ****

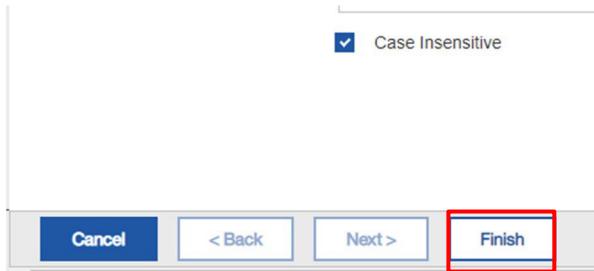
Select Month of Expenses:

January 2021

February 2021



12. Click Finish at the bottom to run the report

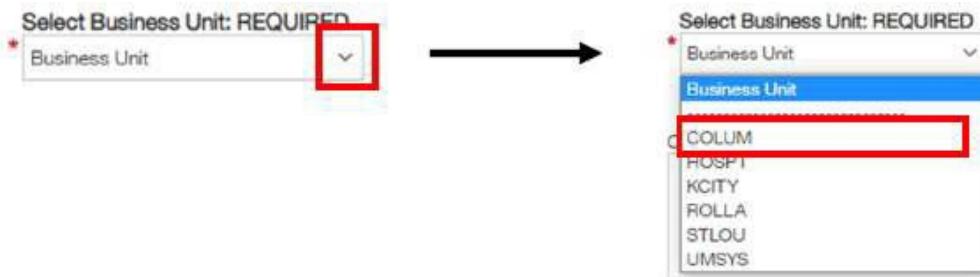


13. The report will appear in the receivers' inbox in a couple of minutes, generally takes 5 but could take up to 15

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.

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

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:



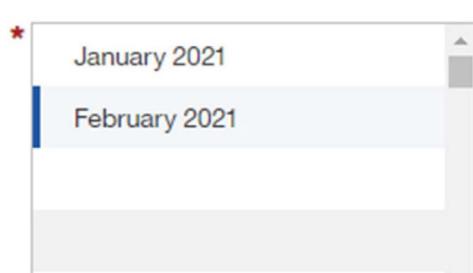
| Project ID |
|------------|
| 00000463 |
| 00019246 |
| 00020862 |
| 00021408 |
| 00022114 |
| 00022822 |
| 00025438 |
| 00028100 |
| 00028105 |
| 00000000 |

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:



| Month |
|---------------|
| January 2021 |
| February 2021 |