

PI Portal Overview

3/15/13

Overview:

- The GOAL for Phase I is to create the foundation for a computer solution that houses all sponsored program related systems in a central location and display the information in a format that is most useful and appealing to faculty.
- The Portal has been designed based on feedback and a goal to provide research faculty a one-stop access point to the information they most often seek across various internal systems.
- Features delivered within the PI Portal will be continuously reviewed and adjusted based on feedback from campus groups (i.e. Research Support Council (RSC), University Research Committee (URC), Research Operations Council (ROC) and Business Operation Centers Advisory Committees).
- Users will be able to customize or specify their landing page preference (i.e., PI Portal View, etc.)
- PI Portal View will be accessible via the "For Researchers" folder/tab added to MyPack Portal

Phase I - There will be Four (4) preset pagelets on the initial landing page. User will have ability to customize layout and content

PI Alerts Pagelet:

- This pagelet will display a message about sponsored project items that require action or that need attention.
- Some items displayed will be automatically populated by the system based on set criteria.
- User will have ability to work items and change status of alert
- Specified Grant Alerts:
 - Delinquent Technical Report
 - Expenditure > Budget
 - Project Ends within 60 Days
 - Project is Past Project End Date
 - Burn Rate = 75% of Project
 - Burn Rate < 10% of Project

My Active Projects - Financial Overview Pagelet:

- This pagelet will display a financial snap shot of all projects associated with the user. The data in this view is as of the most recent month-end.

Researcher Announcements Pagelet:

- This pagelet will display beneficial information regarding research administration and system upgrades.

Manage My Project Pagelet:

- This pagelet will provide a gateway to pertinent information related to the management and submission of awards and proposals.

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The PI Portal will display a split screen view of the Users' projects. One portion will provide a listing of the Projects (Active and Inactive) and Alerts. The other portion will provide Project specific information.

The Project specific area will provide the following information:

- **Project Tab:**
 - Contains general information on the project, associated PIs and their role (PI, Co-PI, Lead PI), and associated segments and their status in the financial system.

- **Expenditure Tab:**
 - Contains a summary view of the budget, previous day and project-to-date expenditures data
 - Users will be able to access more detailed Salary and Expenditure information by pressing the hyperlinks provided on the page. The Salary Details link takes you to Report 11 and the Expenditure Details link takes you to Report 9

- **Alerts Tab:**
 - Contains project specific alerts for items that require attention. User will have ability to mark items requiring additional research, or complete.

- **Personnel Tab:**
 - This tab will display the Individuals who have a portion of their salary paid from the project. It will display current and prior fiscal year(s) information.

- **Equipment Tab:**
 - This tab will display all tagged equipment that is funded by the grant.

Phase II and III - Enhancements

- PI Travel Information
- Effort Reporting (TEARS)
- Faculty Tool Box
- Project Travel (PI and Other Personnel)
- Expand PI Alerts
- Effort Reporting (TEARS)/Cost Share Confirmation Alerts
- Environmental Health & Safety (Lab Safety)
- Accounts Receivable (i.e., cash and payments received, invoices)
- New Award Notifications
- Encumbrances
- Project Closeout
- Project Graphs

The User will be able to easily navigate from project to project via the Project ID hyperlinks on the left.