The PI Portal is the foundation for a centralized gateway that displays data from certain sponsored program related systems in a format that is most useful and appealing to the user.

It displays a split screen view of the Principal Investigator’s projects.

- The left side provides a listing of the Projects (Active and Inactive) and Alerts.
- The right side provides Project specific information.

The “For Researchers” Tab displays the PI Portal landing page.

**Note:** The For Researcher’s tab will only be visible for Principal Investigators

This initial screen will provide the viewer summary information and provide access to key Project Information.

The PI Portal landing page has four basic pagelets:

1. My Alerts,
2. My Active Projects – PI Portal,
3. Researcher Announcements, and
4. Manage My Projects
My Alerts:
- Displays messages about Sponsored Award items (i.e., Ledger 5) that require action.
- Alerts will be populated by the system, based on Fiscal Manager Input and set criteria.
- Alerts include:
  - Delinquent Technical Report
  - Ends within 60 Days

Press the Full Query Results hyperlink at the bottom of the pagelet to view the remainder of the project list and obtain a downloadable copy of the query results.

- Users will have the ability to change the status of the alerts.
  - Alerts may be marked “complete” or “research required”

Note: These alerts will be released July 2013. Additional alerts will be released in the future.

My Active Projects – PI Portal
- Displays a financial snapshot of all projects associated with the user.
- The data presented is as of the last night.

Press the Full Query Results hyperlink at the bottom of the pagelet to view the remainder of the project list and obtain a downloadable copy of the query results.

Researcher Announcements:
- Displays information regarding Research Administration, system issues or upgrades.

Manage My Projects:
- Provides a gateway to pertinent information related to the submission and management of sponsored awards.
- Information included within this section will include but is not limited to: Proposal & Project Management, Compliance, Environmental Health & Safety, Intellectual Property and Other Resources.
PI Portal User Guide

**LEFT Screen:**
Listing of all Active or Inactive projects, and PI Alerts

- **Click on Project ID** to access detailed project information.

**RIGHT Screen:**
Detailed Information for selected project

**Step 3**
- **Press Project ID hyperlink to access detailed Alert & Project Information**

- **Press this button to minimize or maximize the Left Screen.**
Project Detail View:

1. Project Tab:
   - Contains general information on the selected project, including but not limited to the project dates, award amount, F&A, and title.
   - Includes a list of associated PIs and their role (Lead PI, CO-PI)
   - Includes a list of additional associated segments and the current status in the financial system.

Please see pages 5-8 for more information regarding the Expenditures, Alerts, Personnel and Equipment tabs.

The tab will appear RED when active.

General Project Information

Associated PI names and Segments
**Expenditure Tab:**
- Provides a snapshot of the financial status of the project.
- Provides access to detailed Expenditure information (see Expenditure Details hyperlink at bottom of screen).
  - The Expenditure Details link takes you to WRS Report 9 which displays Fiscal Year to Date activity.
- Financial information retrieved will be as of the previous evening.

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### Summary Financial Information

<table>
<thead>
<tr>
<th>Description</th>
<th>Current Budget</th>
<th>Current Month Expenses</th>
<th>Project to Date Expenses</th>
<th>Encumbrances</th>
<th>Budget Balance Available</th>
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<tr>
<td>Salaries</td>
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</tbody>
</table>
### Alerts Tab:

- Contains project specific alerts for items that require attention.
- User will have the ability to mark items “complete” or “research required”

Alerts are automatically generated based on set criteria.
If no HR distributions (i.e., salary & wages) you will get the following message on this screen:

No HR Distributions for this project

Employees paid within the most recent closed accounting period will be marked with an (*) beside their name.

There is a note at the bottom of the screen to remind the user of the purpose of the (*).

Note: This tab does NOT include Student Stipends currently processed/tracked through the Student System and not HR.
If no assets were purchased, you will get the following message on this screen:

No Assets for this project

Please contact your Departmental CAMS Coordinator for any questions regarding missing or incorrect data.

Press the Asset hyperlink to access the detailed equipment inventory report.

Note:
Useful Life: Periods = Months
NOT years
The user can access the PI Alerts two ways:

1. Via the “For Researchers” tab and PI Portal (see pages 3 & 6 for detailed instructions).

2. Via the MyPack Portal Main Menu.
   - The navigation is as follows:
     - Main Menu → Alerts → Manage PI Alerts

   - The Alert Status Field for some items **WILL** be open for updates.
     - These items required immediate attention.

   - The Alert Status Field for some items **NOT** open for updates.
     - These items are system generated **reminders** and are not open for update.

   - Indicates a comment has been added

   - PI Alert Comment field can be used to record notes regarding action taken on the alert.
     - Use of the “Comment” field is **OPTIONAL**
To navigate between the PI Portal and MyPack portal, the user can press the tabs at the top of their screen.

For Help and More Information:

To search for a specific project without having to scroll through the “My Active Projects – PI Portal” results, users can press the Advanced Search link at the bottom of the pagelet.

For more information regarding the PI Portal and future enhancements, press the PI Portal Help link at the bottom of the table or go directly to the Contracts & Grants website, at http://www.ncsu.edu/cng/piportal/.

Questions and suggestions regarding the PI Portal should be emailed to cnghelpdesk@ncsu.edu.