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 single screen view of the Principal Investigator’s projects.

- The screen provides Project specific information.

Navigation to access the PI Portal is:

**Step 1**
Main Menu > Financial Systems > Contracts and Grants > PI Portal – Research Admin

Users will get a search screen to locate projects. There are various ways to search for projects such as by Project ID, Department ID or PI Name.

**Step 2**
Enter desired search criteria
User can narrow results by adding more criteria

**Step 3**
Press hyperlink of desired project

ONLY the first 300 projects will be displayed
• Initial screen will provide the viewer summary Project Information.
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 (i.e., Lead PI, CO-PI)
   - Includes a list of additional associated segments and the current status in the financial system.

Please see pages 4-7 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 user to WRS Report 9 which displays Fiscal Year to Date activity.
- Financial information retrieved is as of the previous night.
**3 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.

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**Summary Financial Information**

<table>
<thead>
<tr>
<th>Project ID: 599991</th>
<th>Status: Active</th>
<th>Project Reference: 099991</th>
<th>As of Date: 03/25/2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Title:</strong> Partnering with Dole Food to Extend Out Flower Postharvest Life</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Alerts</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alert Description</td>
<td>Alert Details</td>
<td>Status</td>
<td>Last Updated</td>
</tr>
<tr>
<td>Delinquent Technical Report</td>
<td>Invoice No. CNG002103</td>
<td>New</td>
<td></td>
</tr>
</tbody>
</table>

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**Project ID: 599991**

<table>
<thead>
<tr>
<th>Project Title: GEPR: Epigenome Dynamics During DNA Replication</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Alerts</strong></td>
</tr>
<tr>
<td>Alert Description</td>
</tr>
<tr>
<td>Delinquent Technical Report</td>
</tr>
<tr>
<td>Ends within 60 days</td>
</tr>
</tbody>
</table>
Personnel Tab:

- Displays Individuals that had a portion of their salary paid from the project.
- Displays current and prior fiscal year(s) information.

Information is in Employee Name sort order.

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.

*Employee had charges in the most recent closed accounting period*

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

**Alerts will not be released until July 2013**

1. Via the “Alerts” tab within the specific project *(see page 5 for detailed instructions).*

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

The User can search for all alerts based on specific criteria such as Department ID *(OUC)*, Project ID, etc.

User can search for ALL alerts that meet specific criteria such as the Department ID *(OUC)*, Project ID, etc.
To navigate between the PI Portal and MyPack portal, the user can press the tabs at the top of their screen.

For Help or More Information:

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.