THE OHIO STATE UNIVERSITY

The new PI Portal

Welcome to the new PI Portal Training Guide.

This guide will take you page by page though the new PI Portal, explaining new features along the way.

New features in the PI Portal include:

- The "Home Page" which presents a simplified and summarized view of information relevant to you and your role within the university.
- The "Search" feature which allows you to search by project number, title, department or investigator. You can also use keywords to narrow your search.
- The "Project Details View" which allows you to see project details including a financial overview, demographics, expenditures, commitments and award documents.
- The "Line Item Rollup" which enables you to create a report consisting of budget and expense information rolled up from selected projects.

Header

Office of Research

PI Portal

Q Search PI Portal

Clicking on the Office of Research PI Portal logo will take you back to your PI Portal Home Page.

The Search PI Portal box allows you to search by project number, title, department, investigator, and keywords.

The Header is static and appears on all pages of the PI Portal.

Default Page for PI:

My Research	Projects	Awards	Proposals	Protocol	ls	Show My	Administrators
This is research that	you are involved i	n as either an	n investigator or	direct admini	istrator		
				Filter ▼	Reports ▼	Details	Export
▼ ID	Project						\$\prims\$ Status
60064857	Future afforda Carrel, Andre — S				y services		Open
60061835	(PSC) INFEWS			ition on the	sustainability o	f regional	Open

This page lists your Research. The default selection is Projects. You can also view Awards, Proposals, and Protocols by clicking the appropriate tab.

Irwin, Elena — Sponsored by NSF Social, Behavioral & Economic Sci

Default Page for PI: Granting access

Show My Administrators

Click the Show My Administrators button to view those who have access to your PI Portal view.

Click the Add New Administrator button to grant individuals access to your PI Portal information.

Note: To give an individual access to specified project(s), click on the Project name and go to the Demographics page.

My Administrators

These are individuals that share access to your data within PI Portal

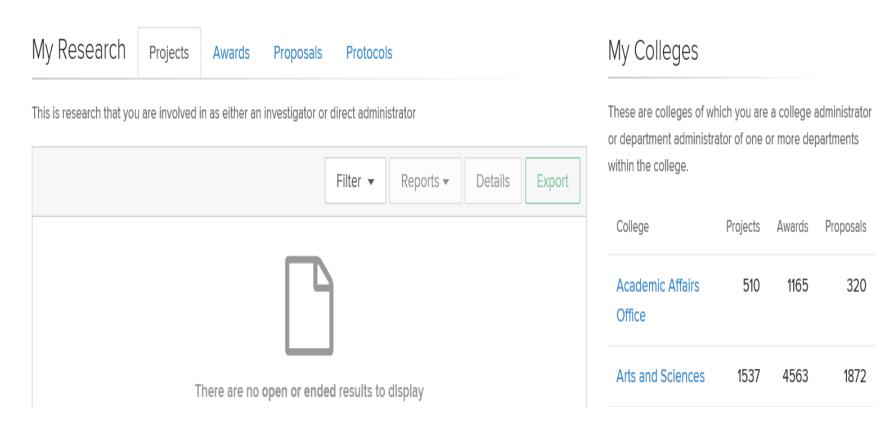
No Administrators



Add new administrator

To add an individual to only a specific project, go to the project's **Demographics** tab and click **Add New Administrator**.

Default Page for College/Dept Admins:



This page lists your Colleges. Click the college name to view departments.

Department list:

Health Sciences Office

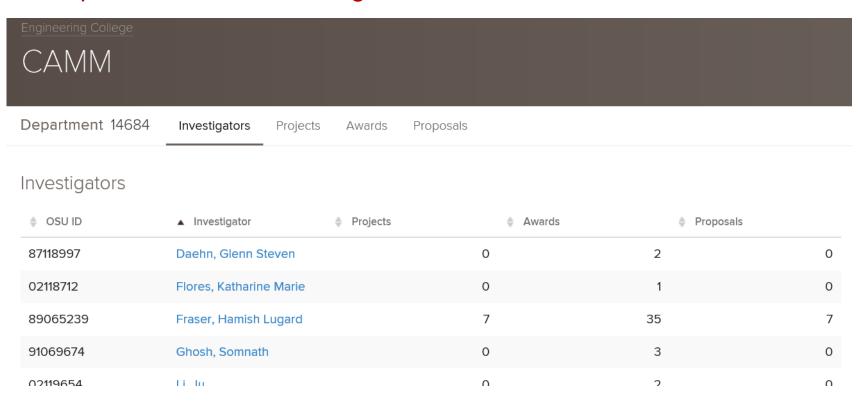
Departments

ID	Department	Projects	Awards	Propos
46040	Cancer Hosp & Research Inst	1	1	0
46004	CCTS-Ctr Clinical Translat Sci	59	10	7
46006	Center for Bioethics	0	1	O
46550	CMIB-Ctr Microb Interface Biol	93	134	51
46361	CMN Research Initiatives	0	1	0
46005	Cntr Integrative HIth Wellness	Ω	1	Ω

This page lists your departments within the college. Click on column headings to change the sort order.

Click on the department name to view Investigators.

Department View - Investigator List

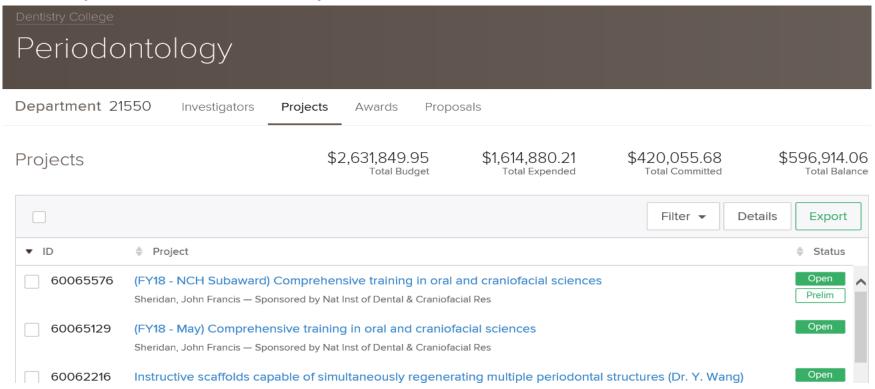


After selecting the Department, you will see a list of investigators within the department as well as the number of projects, awards, and proposals for each PI.

Click on column headings to change the sort order.

Click on the College name to return to the Department List.

Department View - Project List



Click on the Projects tab to view a list of all projects under a department as well as a roll up of the Total Budget, Total Expended, Total Committed, and Total Balance of all the projects.

Department View - Project List Filter tab

\$1,614,880.21 \$2,631,849.95 \$420,055.68 \$596,914.06 Projects Total Expended Total Budget Total Committed Total Balance Filter ▼ Details Export Project Status ▼ ID Filter STATUS Open 60065576 (FY18 - NCH Subaward) Comprehensive training in oral and craniofacial sciences Open (21) Prelim Sheridan, John Francis — Sponsored by Nat Inst of Dental & Craniofacial Res Ended (7) Open 60065129 (FY18 - May) Comprehensive training in oral and craniofacial sciences Hold (0) Sheridan, John Francis — Sponsored by Nat Inst of Dental & Craniofacial Res Closed (6) Instructive scaffolds capable of simultaneously regenerating multiple periodontal sti Open 60062216

Click on the filter tab to view ended and/or closed Projects.

Department View - Project List Details tab

		,					Filte	r ▼ Expor	t X
▼ ID	₱ Project	$\stackrel{\mathbb{A}}{\mathbb{V}}$	Status 🛊	Sponsor	Sponsor Award ID 🔷	Principal Investigator 🌲	Department $\qquad \qquad \diamondsuit$	Budget	Expende
60064920	Stability of epinephrine in a 0.9% saline solution		Open	Am Soc of Dentist Anesthesiologists	Letter dated 4/6/2018	Cornelius, Bryant	Oral/Maxillofacial Surg	\$3,700.00	\$139.
60058262	The effect of parathyroid hormone analogues when added to mineralized bone xenografts	1	Open	Am Acad Implant Dentistry Res Fdn	Award dated 11/15/16	Emam, Hany Abdel Basir Sharaf Elsayed	Oral/Maxillofacial Surg	\$20,000.00	\$15,991.
60046100	Pathway CH2: Sphenopalatine ganglion stimulation for the treatment of chronic cluster headache	n	Open	Autonomic Technologies, Inc	Pathway CH2/CIP- 006	Otto, Bradley Alan	Otolaryngology	\$213,950.30	\$182,791.
60026665	A prospective study to evaluate Astra Tech Osseospeed 3.0S implants and Atlantis abutments for restoration of a lateral incisor in cleft patients		Open	Astra Tech	D-2009-007	Knobloch, Lisa Ann	Restorative/Prosthetic	: \$15,000.00	\$11,968.
<)

\$252,650.30 \$210,890.51

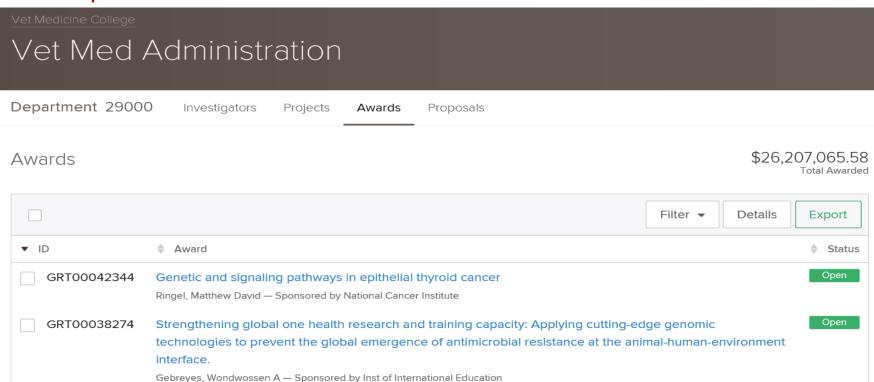
Click on the Details tab to see additional information for all projects listed or checked.

Department View - Project List Details tab

									Filter ▼	Export
▼ ID	₱ Project	t \$	Expended	Committed	Balance	Billing	Award	Begin Date		♦ SPO
60064920	Stability of epinephrine in a 0.9% saline solution	00	\$139.45	\$0.00	\$3,560.55	BG001	GRT00051212	03/01/2018	02/28/2019	Himsworth, Cory James
60058262	The effect of parathyroid hormone analogues who added to mineralized bone xenografts	00	\$15,991.42	\$2,145.04	\$1,863.54	BG001	GRT00045954	01/01/2017	12/31/2018	Himsworth, Cory James
60046100	Pathway CH2: Sphenopalatine ganglion stimulation for the treatment of chronic cluster headache	or30	\$182,791.44	\$76,545.00	(\$45,386.14)	BG001	GRT00036211	07/08/2014	12/31/2020	Adkins, Michael P
60026665	A prospective study to evaluate Astra Tech Osseospeed 3.0S implants and Atlantis abutment for restoration of a lateral incisor in cleft patients	00 s	\$11,968.20	\$375.00	\$2,656.80	BG001	GRT00020428	05/28/2010	12/31/2020	Cress, Kristin E
<										>
	\$252,650.30	\$21	10,890.51	\$79,065.04	(\$37,305.25)					

Scroll right for more information. Click on any column title to change sort order. Click the Export button to export selected data. Click the X to return to snapshot view.

Department View - Award List



Click on the Awards tab to view a list of all awards under a department as well as a roll up of the Total Awarded amount of all the awards.

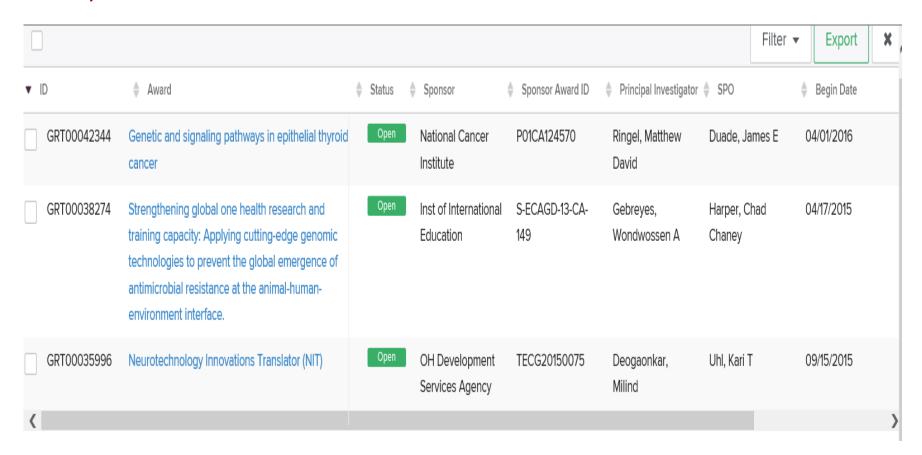
Department View – Award List Filter tab

Awards \$26,207,065.58

		Filter • Details	Export
▼ ID	♦ Award	Filter	♦ Status
GRT00042344	Genetic and signaling pathways in epithelial thyroid cancer Ringel, Matthew David — Sponsored by National Cancer Institute	STATUS Archived (7)	Open
GRT00038274	Strengthening global one health research and training capacity: Applying cutti- technologies to prevent the global emergence of antimicrobial resistance at the interface.	Open (3) e animal-human-environment	Open

Click on the filter tab to view archived Awards.

Department View - Award List Details tab



Click on the Details tab to see additional information for all awards listed or checked.

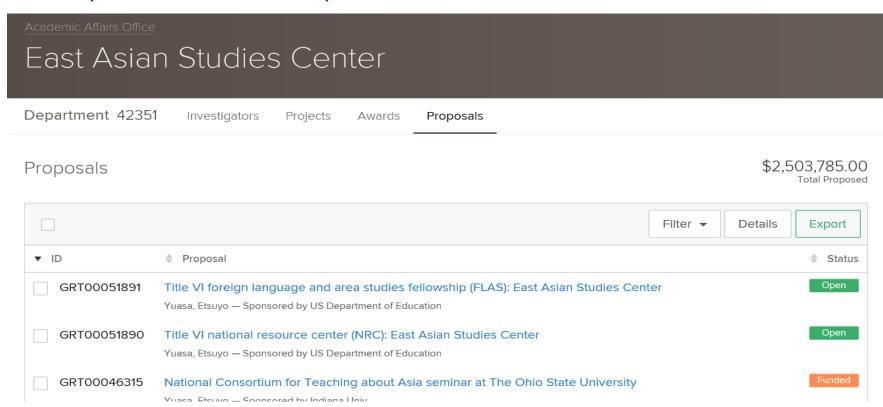
Department View - Award List Details tab

						Filter ▼	Export	×
▼ ID	Award	stigator	♦ SPO	Begin Date	\$	End Date	Award	d to Date
GRT00042344	Genetic and signaling pathways in epithelial thyroic cancer	dew	Duade, James E	04/01/2016	0	3/31/2019	\$4,942	550.58
GRT00038274	Strengthening global one health research and training capacity: Applying cutting-edge genomic technologies to prevent the global emergence of antimicrobial resistance at the animal-human-environment interface.	Α	Harper, Chad Chaney	04/17/2015	0	5/31/2018	\$199,	995.00
GRT00035996	Neurotechnology Innovations Translator (NIT)		Uhl, Kari T	09/15/2015	0	9/14/2019	\$21,064,	520.00
<)

\$26,207,065.58

Scroll right for more information. Click on any column title to change sort order. Click the Export button to export selected data. Click the X to return to snapshot view.

Department View - Proposal List



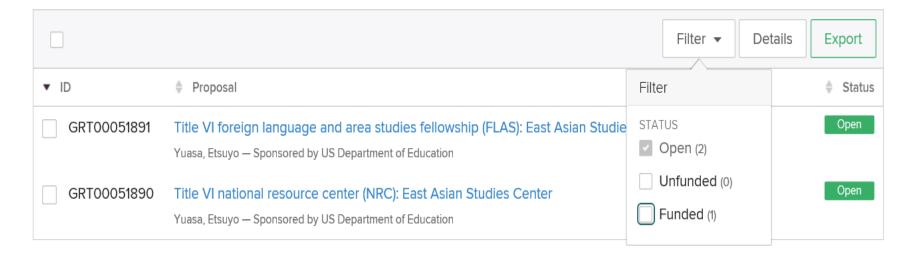
Click the Proposals tab to view a list of all proposals under a department as well as a roll up of the Total Proposed amount of all the proposals.

Department View – Proposal List Filter tab

Department 42351 Investigators Projects Awards Proposals

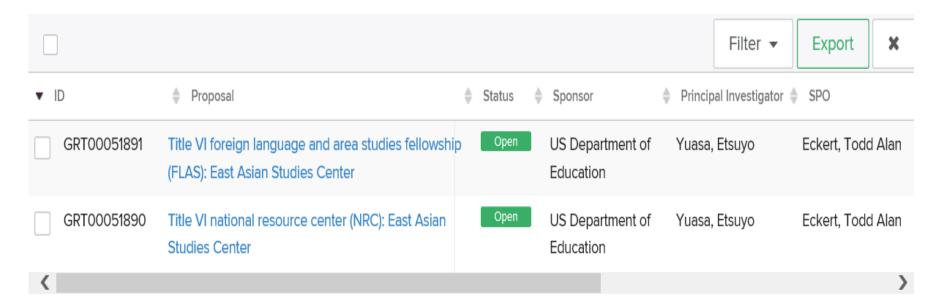
Proposals

\$2,466,000.00 Total Proposed



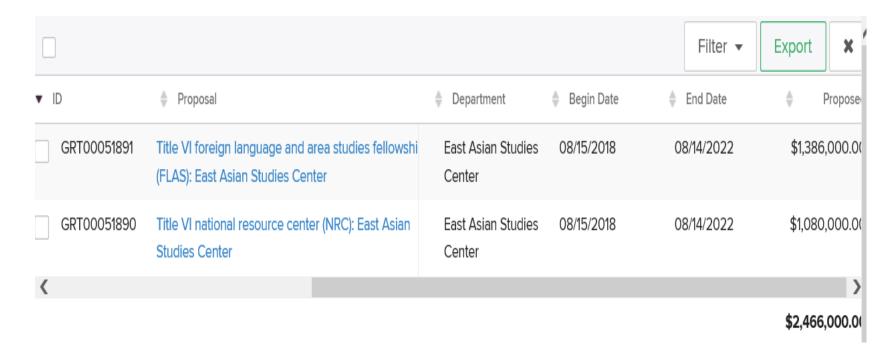
Click on the filter tab to view funded and/or unfunded proposals.

Department View - Proposal List Details tab



Click on the Details tab to see additional information for all proposals listed or checked.

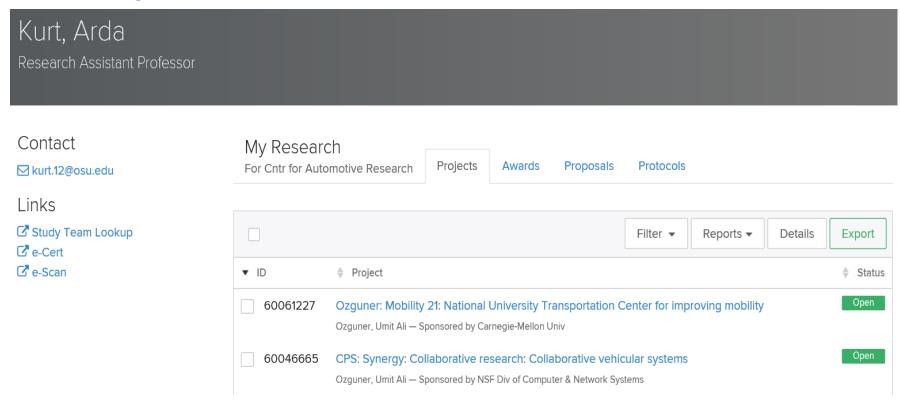
Department View - Proposal List Details tab



Scroll right for more information. Click on any column title to change sort order. Click the Export button to export selected data. Click the **X** to return to snapshot view.

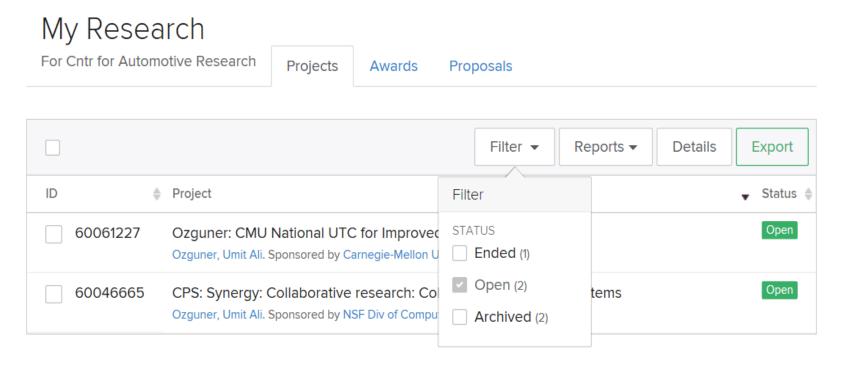


Investigator View



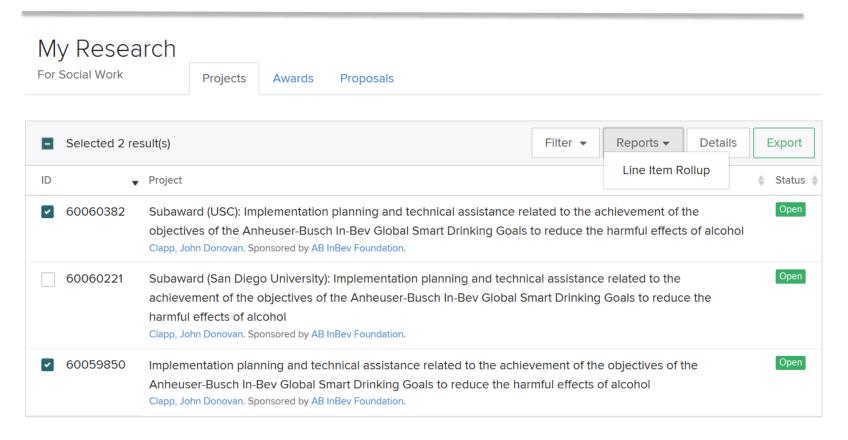
Click an Investigator's name to view that PI's projects, awards, proposals, and protocols. The email link opens a new email message addressed to the PI. Study Team Lookup, eCert, and eScan link to the respective application.

Investigator View – Filter tab



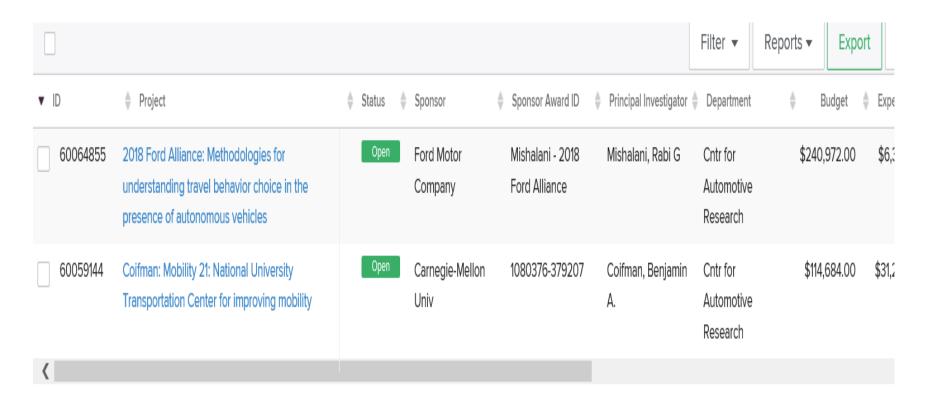
Click on the filter tab to view ended and/or archived Projects.

Investigator View- Report Tab



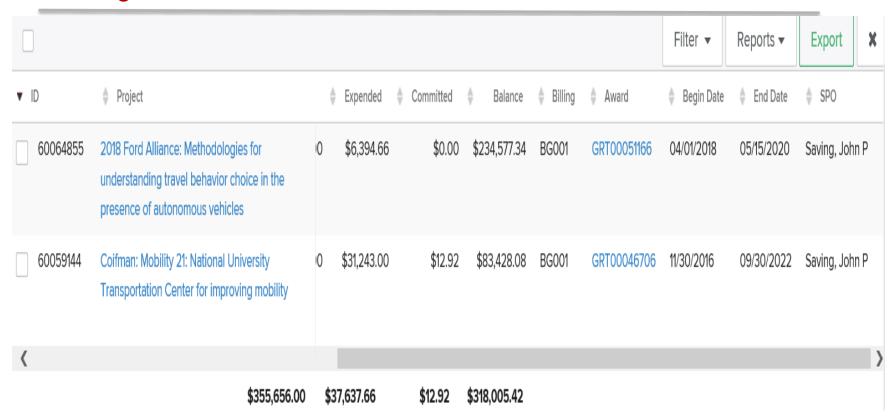
To see the Line Item Rollup for multiple projects, select the projects then click the Reports tab then "Line Item Rollup."

Investigator View – Details tab



Click on the Details tab to see additional information for all projects listed or checked.

Investigator View Details Tab



Scroll right for more information. Click on any column title to change sort order.

Click the Details tab to return to snapshot view.

Click the Export button to export selected data. Click the X to return to snapshot view.

Investigator View – changing to Awards or Proposals

My Research
For Byrd Polar & Climate Rsch Cntr

Projects

Awards

Proposals

Protocols

Use the tabs at the top to switch to Awards, Proposals, or Protocols.

Project Details View



Information on the top of the Project Details page will continue to display on all pages under the Project Details view.

- Project Title
- Sponsor Balance
- Project Number
- Tabs for additional project information

Information at the bottom of the Project Details page shows when the data was last loaded. It will display on all pages under the Project Details view.

② Information is accurate as of 03/01/2018

Project Details At a Glance

At a Glance

Award

GRT00039496

Principal Investigator

Moritz, Matthijs

Period

08/01/2015 - 07/31/2017

SPO

Rosenberg, Laurie

Sponsor

NSF Behavioral & Cognitive Sciences

Sponsor Award ID

1546061

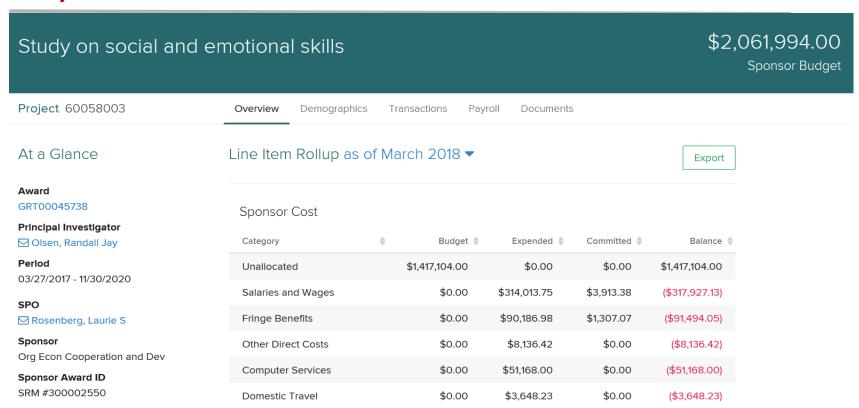
F&A Rate

54% MTDC

Information on the left side of the Project Details page will continue to display on all pages under the Project Details view.

- Items in blue are links.
- The Award ID number will redirect to the Award Details page.
- The PI's name will send an email to the PI.
- The SPO's name will send an email to the Sponsored Program Officer.

Project Details Overview Tab



The Overview tab is the default tab and displays the Project Financial Summary.

Project Details Overview Tab



Click on the "as of month" drop down arrow to select a different month to view.

Project Details Overview Tab

Project-Specific Information

Fee Code CE - Tuition and fees will be charged to student's JED Org and Fund 049100

Salary Cap CAPNO - Cap not applicable

② Information is accurate as of 03/06/2018

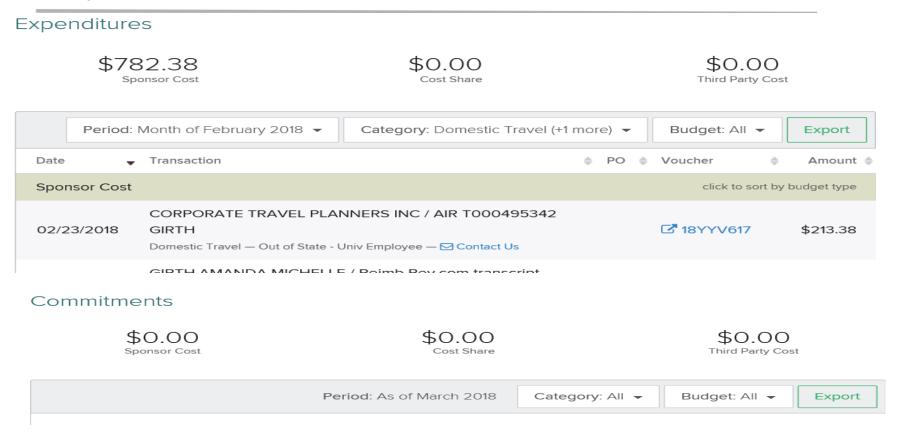
Scroll down to see Project Specific code information regarding the project. A date stamp is displayed stating when data was last updated.

Project Demographics Tab

Overview	Demographics	Transactions	Payroll	Document	S	
Team				Departr	ments	
Team Mem	ber			ID	Department	Allocation
Tong, And				14250	Chemical & Biomolecular Eng	100%
Kurt, Arda Co-Investiga						
Ozguner, Co-Investiga						

The Demographics Tab lists all Investigators and all Departments on the project

Project Transactions Tab



The Transactions Tab lists all expenditures and commitments on the project not including payroll costs. The Invoice is attached and is selectable when in blue font.

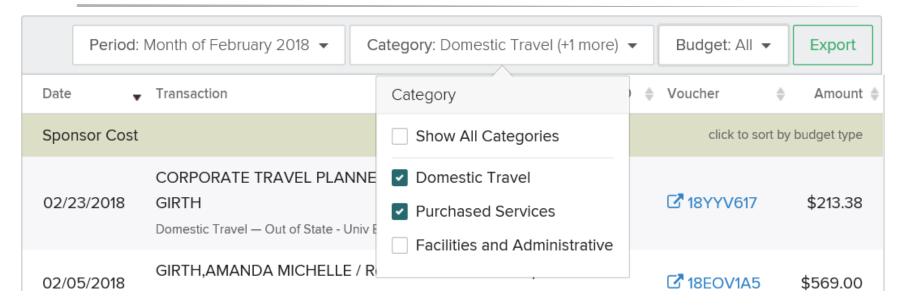
Project Transactions tab - options

Р	Period: Month of February 2018	Category: Domestic Travel (+1 more) ▼	Budget: All ▼	Export
Date	Period		Voucher	Amount 🌲
Sponso	This Month		click to sort by b	oudget type
02/23/	Last Month Start Date (earliest)	e - Univ Employee — ☑ Contact Us	☑ 18YYV617	\$213.38
02/05/		LLE / Reimb Rev.com transcript I Services Purchased — ☑ Contact Us	☑ 18EOV1A5	\$569.00
	Load Custom Range			

Expenditures will show the current transactions. Use the date range feature to change the start and end dates. Click *Load Custom Range* to update

Information displayed can also be exported by clicking the *Export* buttons.

Project Transactions tab - options



Click the Category drop down arrow to filter expenditure types.

Project Transactions tab – contact us



Click the Budget drop down arrow to view Sponsor Cost, Cost Share, and Third Party Cost. Information displayed can also be exported by clicking the Export buttons.



If there is a question or concern regarding a transaction, click the Contact Us link to send an email to the OSP Finance department.

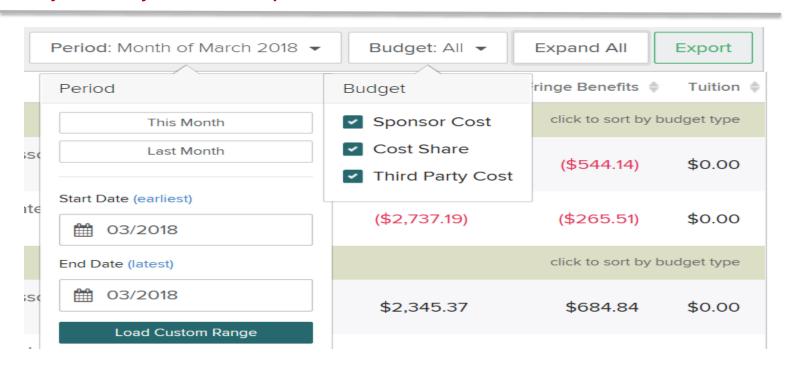
Project Payroll tab

Payroll



The Project Payroll tab lists all payroll costs.

Project Payroll tab - options



Use the date range feature to change the start and end dates. Click *Load Custom Range* to update.

Click the Budget drop down arrow to view Sponsor Cost, Cost Share, and Third Party Cost. Information displayed can also be exported by clicking the Export buttons.

Project Payroll Tab - details



Click the plus sign next to a payroll transaction to display details on that item including any commitments.

You can also click the Expand All button Expand All to display detail on all transactions.

If there is a question or concern regarding a transaction, click the Contact Us link to send an email to the OSP Project Payroll department.



Scroll to bottom of Commitments page to see when data was last updated.

Information is accurate as of yesterday

Project Documents Tab

Documents

Award Documents

PA-005

Month End Financials

Month



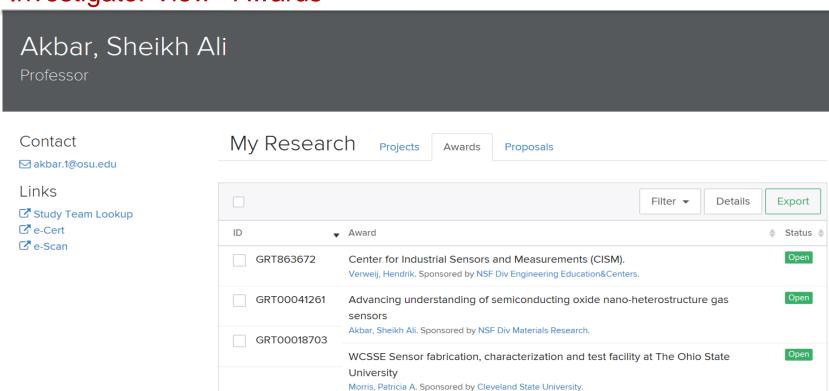
La December 2017

The Documents Tab displays documents associated with the Project.

PA005 will redirect to the ePA005 application.

Month End Financial links will redirect to the e-MEFS for the month selected.

Investigator View - Awards



Selecting *Awards* under a PI's name, displays all current awards for the PI/coPI selected. You can also view Awards which have been archived by clicking the Filter tab. Click on the Details tab for additional information of all awards listed or checked. Click the Award title to display the detail of that award.

Award Details View

Center for Industrial Sensors and Measurements (CISM).

\$1,507,760.00 Award To Date

Award GRT863672

Overview

Demographics

Projects

Activity Funding

Documents

Information on the top of the Award Details page will continue to display on all pages under the Award Details view.

- Award Title
- Award to Date Amount
- Award Number
- Tabs for additional award information

Information at the bottom of the Award Details page shows when the data was last loaded.

Information is accurate as of 09/28/2017

Award Details At a Glance

At a Glance

Principal Investigator

Verweij, Hendrik

Period

04/01/1996 - 03/31/2004

SPO

Uhl, Kari

Type

COST REIMBURS

Sponsor

NSF Div Engineering Education&Centers

Sponsor Award ID

EEC-9523358

Information on the left side of the Award Details page will continue to display on all pages under the Award Details view.

- Items in blue are links.
- The PI's name will send an email to the PI.
- The SPO's name will send an email to the Sponsored Program Officer.

Award Details - Overview

Overview Demographics Research Reports Financials Documents

Amendments



▼ Show 3 older amendments

The Overview tab is the default tab and displays Amendment information.

Award Details - Overview

Terms

ACKN - Acknowledgement Required

NAME - Sponsor name use restricted

Prior approval required to use the name of
the foundation for any commercial purpose
or in the public media in connection with the
study

PUBL - Publicatn/Publicity restricted

Notify the foundation in writing 30 days prior
to publication or presentation of findings of
the study

Attributes

ADVREPT - Advancement Reporting Yes

Other Information

Other

There is a subcontract with Dr. Carlos Alvarez at TRINCH. Dr. Alvarez has an adjunct appointment in VCS.

Scroll down to see Terms, Attributes, and Other Information.

Award Demographics

Overview	Demographics	Projects	Reports	Financials	Docu	ments		
Team		Departments						
Team Member		Effort		ID		Department	Award Allocation	
Lal, Rattan Principal Investigator		0%		11	11730 Sch of Environ & Natural F		100%	
Lorenz, Klaus Eugen Co-Investigator		10	00%	50	5730	OARDC-Environ & Natural Res	0%	

The Demographics Tab lists all Investigators and all Departments on the Award.

Award Demographics

Sponsor

Mailing Address

Univ of Memphis

COLLEGE OF ED

Memphis, TN 38152

Administrative Contact

Angela Fair

Sponsored Projects Coordinator II

afair@memphis.edu

901 6784409

901 6780880

Billing Address

Andre Walton

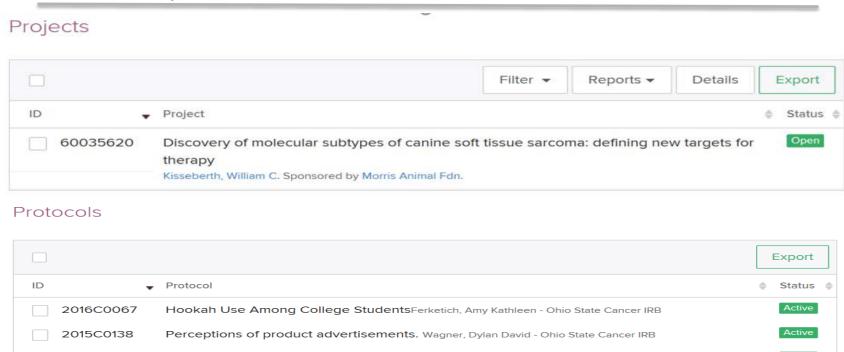
COLLEGE OF ED

Memphis, TN 38152

No Technical Contact

Scroll down the page to view Sponsor contact information

Award Projects Tab



The Projects Tab lists all projects on the Award as well as Protocol information. Click the Project Title to be redirected to the Project Detail pages. Click the Protocol Title to be redirected to the Protocol Detail pages.

Award Reports Tab

Reports

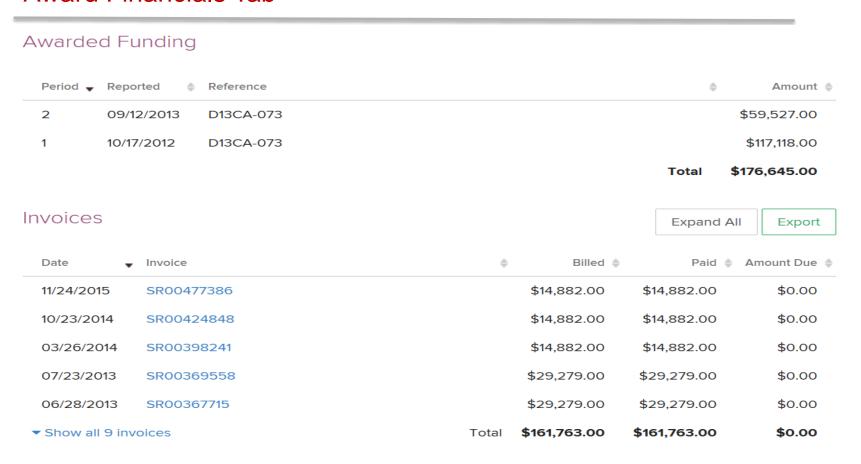
		Export
Due Date	▼ Report	\$ Billing Group \$
10/31/2015	Final Technical Report for 10/01/2012 to 09/30/2015	
04/01/2015	Semiannual Technical Report for 10/01/2014 to 03/31/2015 ✓ Completed on 06/20/2015 by Kisseberth, William C	
10/01/2014	Semiannual Technical Report for 04/01/2014 to 09/30/2014	
04/01/2014	Semiannual Technical Report for 10/01/2013 to 03/31/2014	
10/01/2013	Semiannual Technical Report for 04/01/2013 to 09/30/2013	
04/01/2013	Semiannual Technical Report for 10/01/2012 to 03/31/2013	

The Reports Tab lists reports on the Award.

Click on column headings to change the sort order.

Information displayed can also be exported by clicking the *Export* button

Award Financials Tab



Displays Funding information and lists Invoices. Clicking on an invoice number will show additional information on that item.

Award Documents Tab

Overview Demographics Projects Reports Financials **Documents**

Documents

☑ Award Documents

☑ PA-005

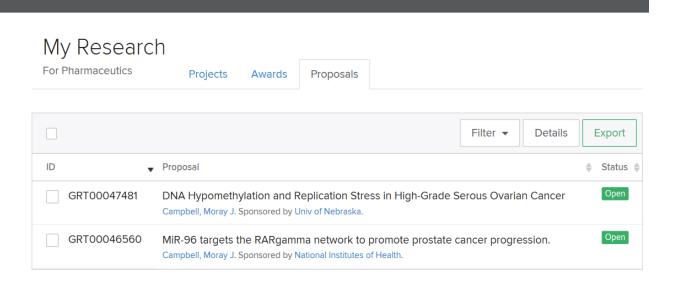
The Documents Tab displays documents associated with the Award. PA005 will redirect to the ePA005 form.

Investigator View - Proposals

Campbell, Moray J

Research Associate Professor

Contact ☑ campbell.1933@osu.edu Links ☑ Study Team Lookup ☑ e-Cert ☑ e-Scan



Selecting *Proposals* under a PI's name, displays all current proposals for the PI/coPI selected. Click on Details for additional information of all proposals listed or checked. Click the Proposal Title to display the detail of that award.

Proposal Details View

Combination therapy with HER-1 and HER-2 for gastric cancers

\$423,500.00

Proposed

Proposal GRT00041431

Demographics

Documents

Information on the top of the Proposal Details page will continue to display on all pages under the Proposal Details view.

- Proposal Title
- Proposed Amount
- Proposal Number
- Tabs for additional proposal information

Information at the bottom of the Proposal Details page shows when the data was last loaded.

Proposal Details At a Glance

At a Glance

Principal Investigator

Kaumaya, Pravin

Period

07/01/2016 - 06/30/2018

SPO

Keefer, Stanislava

Sponsor

National Cancer Institute

Information on the left side of the Proposal Details page will continue to display on all pages under the Proposal Details view.

- Items in blue are links.
- The PI's name will send an email to the PI.
- The SPO's name will send an email to the Sponsored Program Officer.

Proposal Demographics

Pan Arctic extreme	weather and climate in ASR		\$1,074,	506.00 Proposed
Proposal GRT00045793	Demographics Documents			
At a Glance	Team	Departn	nents	
Principal Investigator ☑ Bromwich, David Howard	Team Member	ID	Department	Allocation
Period 09/01/2017 - 08/31/2021	Bromwich, David Howard Principal Investigator	40500	Byrd Polar & Climate Rsch Cntr	100%
Sponsor NSF Div Polar Programs				
SPO ☑ Aquara, Traci Kristine				

The Demographics tab is the default tab and lists all Investigators and all Departments on the Proposal. Items in blue are links to other information.

Proposal Documents

Demographics **Documents**

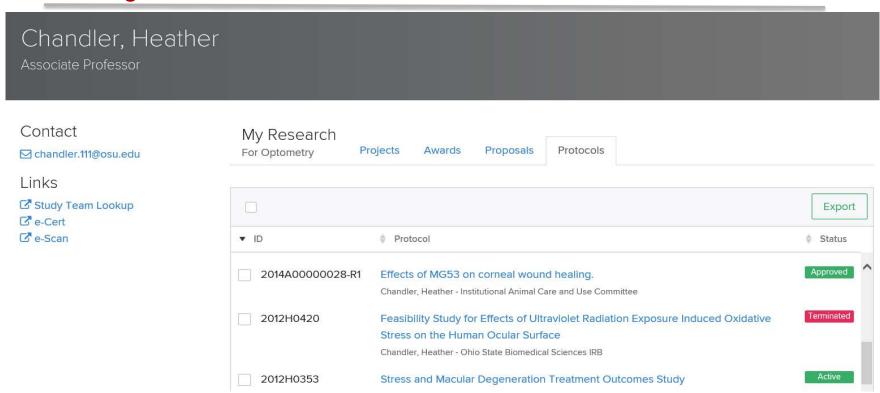
Documents

Proposal Documents

PA-005

The Documents Tab displays documents associated with the Proposal. PA005 will redirect to the ePA005 form.

Investigator View - Protocols



Selecting *Protocols* under a PI's name, displays all current protocols for the PI/coPI selected. Click the Protocol Title to display the detail of that award.

Protocol Details View

Western IRB (WIRB)

CIP-10178: INTELLECT 2-HF Study

Protocol 2017W0111

Demographics

Awards

Information on the top of the Protocol Details page will continue to display on all pages under the Protocol Details view.

- Protocol Title
- Protocol Number
- Tabs for additional protocol information

At the bottom of the page, a link to Buck-IRB is displayed.

Protocol Details At a Glance

Principal Investigator

☐ Green, Patrick

Approval Date

05/30/2018

Expiration Date

05/18/2019

College

College of Vet Medicine

Department

Veterinary Biosciences

Information on the left side of the Protocol Details page will continue to display on all pages under the Protocol Details view.

- Items in blue are links.
- The PI's name will send an email to the PI.

Protocol Demographics

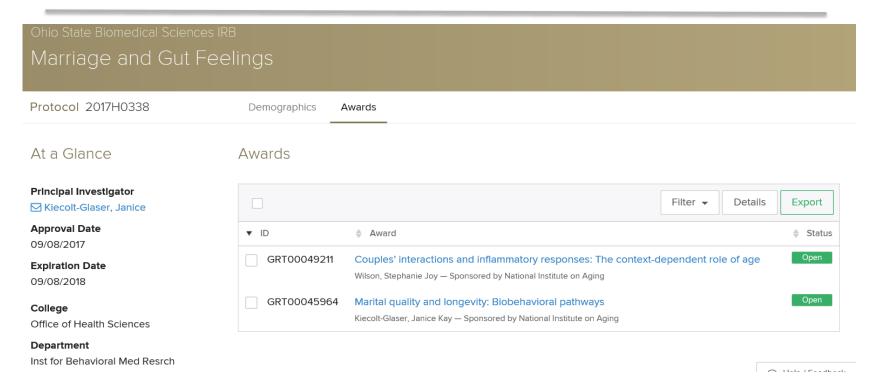
Exempt

2002 Columbus Citizen Satisfaction Survey

Protocol 2003E0237	Demographics Awards		
At a Glance	Team		
Principal Investigator ☑ Brown, Trevor	Team Member		
Approval Date 07/18/2003	Brown, Trevor Principal Investigator		
Expiration Date 07/17/2004	Ethridge, Brandy Co-Investigator		
College John Glenn			
Department John Glenn Dean's Office			

The Demographics tab is the default tab and lists all Investigators on the Protocol. Items in blue are links to other information.

Protocol Awards



The Awards Tab displays awards associated with the Protocol. Click on the Award title to be redirected to the Award Details pages.

How to reach us

For technical or access issues, you can contact the ORIS Help Desk directly.

- Website: <u>orhelp.osu.edu</u>
- Email: orhelpdesk@osu.edu
- Phone: 614-688-8288

For specific questions regarding your project or award, contact your Sponsored Program Officer.