CFAES

What is the PI Portal?

The PI Portal provides principal investigators and their staff with online access to award financial information. Access to the Portal is restricted to principal investigators and co-investigators with activated Ohio State credentials unless access is granted to administrators.

New PI Portal User Guide

How a PI grants access to his/her grants in the PI Portal

There are multiple types of access to the PI Portal:

- **Investigator:** The PI's view of all his/her grants.
- **Grant Administrator:** Delegated by the PI. Shows all grants and profile information of a specified PI.
- **Grant Assistant:** Delegated by the PI. Shows specified grants or PI Portal web pages as designated by the PI.
- **Department Administrator:** Shows all grants under a specified department(s).
- **College Administrator:** Shows all grants under a specified college.

A PI can grant access in the new PI Portal by clicking "Show my Administrators" on the PI's home page:

- To grant access to all grants/proposals/awards, the PI will click the "Add New Administrator" button and type in the name.
- To grant access to specific grants, the PI will click on each Grant and go to the Demographics tab then click "Add New Administrator"

To obtain departmental access for a Cost Center Manager (CCM), Chairs and Center Directors can send an email to **orhelpdesk@osu.edu**. The email should include the requestor's name and title, the designee's name and OSU Username, and the department(s) the designee should access.

PI Portal Functions

Search:
- The **Search** feature will allow you to search by award number, grant number, project title, department, or people. You can even use keywords to narrow your search further.

My Research:
- This is the default view once logged in to the PI Portal. Select from the following tabs to view additional information.
- **Grants:** A list of your grants.
- **Awards:** A list of your awards.
- **Proposals:** A list of your proposals.
- **Protocols:** A list of your protocols.

Within the tabs, you can **Filter** by status (Ended, Open and Archived); view **Reports**; see **Details** of additional information and **Export** the list.

Awards:

At a Glance section is available on all awards pages and provides information and links to the period, award type, PI and SPO email links, and sponsor information.

The following menu items are available in the **Awards** section:
- **Overview:** Default view that displays the amendment information, terms, attribute, and other information.
- **Demographics:** A list of all principal investigators, co-investigators, and sponsor contact information.
- **Research:** Lists all grants and protocol information on the award.
- **Reports:** Lists all reports on the award.
- **Financials:** Award funding information and invoices associated with the award.
- **Documents:** Documents associated with the award.

Grants:

At a Glance section is available on all grant pages and provides quick links to the award number, period, PI, SPO and billing specialist email links, sponsor information and F&A rate.

The following menu items are available in the **Grants** section:
- **Overview:** Default view that displays the grants financial summary. Click on the "as of month" to change the display month.
- **Demographics:** A list of all principal investigators, co-investigators, and departments on the grant.
- **Transactions:** Lists all expenditures and commitments on the grant for the current month. Change the date to view previous months.
- **Payroll:** Lists all personnel expenditures and commitments for the current month.
- **Documents:** Documents associated with the grant.

Proposal:

At a Glance section is available on all proposal pages and provides information and links to the PI, period, SPO email link, and sponsor information.

The following menu items are available in the **Proposal** section:
- **Demographics:** A list of all principal investigators, co-investigators and departments associated with the proposal.
- **Documents:** Documents associated with the proposal.

Sources: https://orhelp.osu.edu/support/index.php?/Knowledgebase/List/Index/8/PI-Portal
https://research.osu.edu/building-your-research-program/research-administration-tools