

# SPIRIT

## Principal Investigator (and Project Personnel) User Manual

## **Logging into SPIRIT:**

To access SPIRIT please utilize the following link: <https://app.wku.edu/spirit/>

Input your NET ID and password

You will have the option to navigate to All Projects, External Projects, RCAP Projects, FUSE Projects, and Search/Reports.

\*SPIRIT is not compatible with Internet Explorer.


## **Viewing and Editing an Existing Project:**

You will have access to all projects that you are listed as a PI, Co-PI, or WKU Personnel.

To view an existing external project that you are connected to, please select “External Projects”. Then scroll to the table. You can enter proposal number, index number, or PI name in the search bar to filter to the record you wish to view.

Proposal #	Index #	PI Last Name
11-0001	Search	Wallace

Find the record you wish to view.

Proposal #	Index #	PI Last Name	PI First Name	Prime Sponsor Name	Status	Date Submitted	Date Awarded	Actions
11-0001	Search	Wallace	Search	Search	Search	Search	Search	
11-0001		Wallace	Emily	National Science Foundation	Pending			

Click to view the project.



Navigate project tabs to see all viewable project details.

Project	Chart of Accounts	Effort	Compliance	Approvals	Summary
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## **Running Searches and Reports:**

You will have access to run searches and reports for all projects that you are listed as a PI, Co-PI, or WKU Personnel.

Click on Search/Reports in the main dashboard or the top navigation bar.

You can create a search from scratch; however, several saved searches are available from the drop down. Depending on the type of report needed, it may be advisable to choose an existing search and modify it as needed.

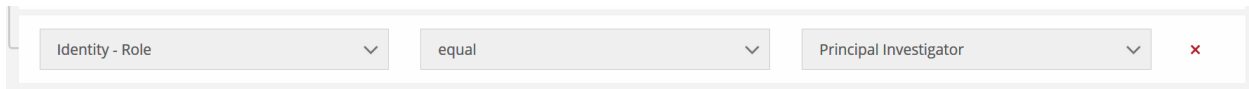
To view an existing search criteria, select an option from the drop down and click the action to “populate”.

If you select “edit” as the action it will permanently change sample search criteria, so only edit if sample needs to be changed.

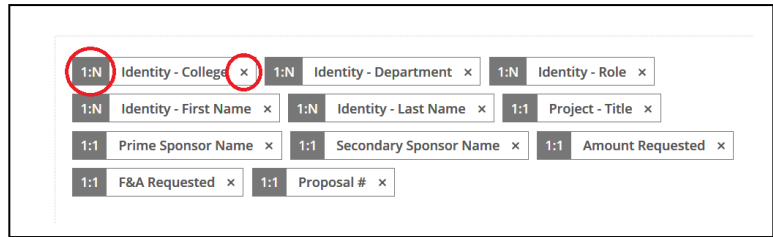
(You will only be able to edit searches that you already created and saved.)



Once you populate, make changes to the search criteria as needed. For searches with multiple components, it may be helpful to group criteria. If you would like your results to only show one record per proposal, be sure to add a group that makes the identity-role equal to principal investigator.



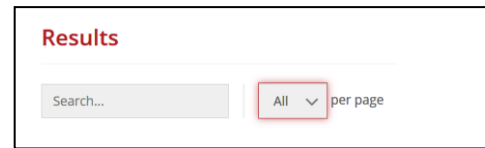
To display the exact search results that you need, use the **1:1** (i.e. there is only one possible value in the project record – such as proposal #) and **1:N** (i.e. there could be more than one possible value in the proposal record – such as Co-PI names, keywords, etc.). The search results are the columns of data that you will see. Reorder columns by clicking and dragging the item and delete an item by clicking the “x”.



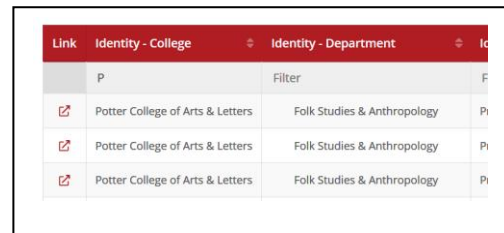
Once your search criteria and results are entered, click search. If the results are what you needed and you will need to run this search in the future, click save criteria and name the search something new (do not name it the same as the sample).



Your search results will be displayed in the table below. **To view the full results, be sure to change the view to “all” per page.**



You can use the main search box or the filter option to filter your results further. Often typing the first letter(s) of a word will filter to meet your search needs.



To view a project from your search list, click the project link. The project record will open a new tab so your results remain.



You can copy your search results or export them to .CSV, Excel, or PDF. **Be sure that you have selected to view “all” records per page or you will only export the search results that are shown in the table, which may not include all results.**

