Website for General Information

The PI Portfolio webpage: http://calanswers.berkeley.edu/piportfolio includes a login link to the tool itself as well as training materials and documentation, project information, and support contacts.

Faculty Log In

To login, go to http://calanswers.berkeley.edu/piportfolio, and click 'Access your PI Portfolio dashboard'. Then submit your CalNet login information.   You will be brought to the PI Portfolio Overview page, which retrieves alerts and calendar events for your funds, as well as giving you overview information about the program and links to documentation.

Navigating the Dashboard

The PI Portfolio dashboard offers numerous ways to explore your data. The Overview and Portfolio pages summarize data for *all* of your funds. To explore a specific fund in more detail, click on the fund number from the Portfolio page. It will take you to the *Fund Summary* tab. The selected fund will also be detailed on the *By Month*, *Transactions* and *Personnel* tabs as well. The key navigation concepts are pointed out below:

Whole Portfolio   Specific to Selected Fund

Use **Filters** to refine the data displayed – **be sure to click Apply**.

Clicking a **Fund Number** on the Portfolio page determines the fund data displayed on the details pages. Links are shown in blue.

Use **Select View** to show alternate, more detailed views of the data.

PI Portfolio Dashboard

Overview | Portfolio | Fund Summary | Transactions | By Month | Personnel

Filters

Faculty Name   John Doe   ▼   * For spon

Sponsored Awards

Select View   Summary by

Fund Number	Award Description	Project Start Date	Budge Date
30226	Sample award 1	09/15/2010	08/31
Grand Total			

Analyze

Getting or Granting Access

Faculty and researchers automatically have access to the funds they manage, including funds where they named as PI or CoPI on the award, or for non-sponsored funds, that have transactions using their specific ChartField2. Others who need access can request it through Cal Access: https://idc.berkeley.edu/ca/ .   Lead PIs will receive an email that access has been requested, and be able to log into Cal Access to approve or reject the request. Campus Shared

Services Research Administrators' access is approved by CSS managers. More information and instructions are available on the Cal Answers website at http://calanswers.berkeley.edu/active-initiatives/pi-portfolio-initiative/access-data-depends-your-role.   Note: access to PI Portfolio is different from other Cal Answers dashboards, so you may not be see PI Portfolio in the dashboard menu until access is authorized.

Staff Login

The key difference for non-faculty is that your login will take you to the standard Cal Answers home page rather than directly into the PI Portfolio dashboard.   You will need to select the PI Portfolio dashboard and enter the faculty member's name to view that person's fund data.

1. Go to http://calanswers.berkeley.edu/PIPortfolio, click the 'Access your PI Portfolio dashboard' link and complete the CalNet authentication. The tool opens to the Cal Answers application (pictured here).

2. In the upper right, open the Dashboards menu and select 'PI Portfolio Dashboard' to open your Overview.

3. On the Overview page click the arrow in the 'Faculty Name' field in the upper left. Choose "Search…" and type in the First Name, then Last Name to find the person you need (note that the order is First Name Last Name). When the faculty name appears in the list, highlight the name and click 'Move' to select the name. Then 'OK' your selection and click 'Apply' to retrieve that individual's data.
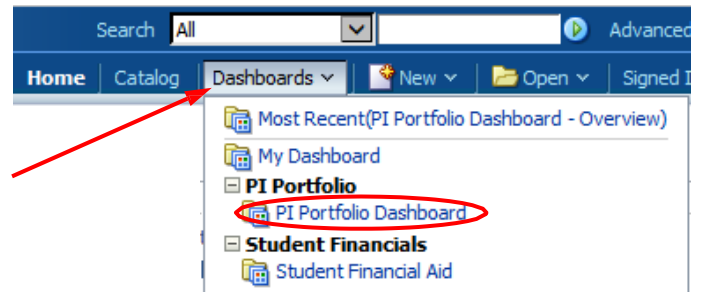
Customize and Save Multiple Data Views

When you have set up filters options, view selections or other changes to the dashboard page, you can choose to save these set-ups either as a default, or as a named choice for later recall. This is particularly helpful for staff who work with several faculty, as it allows them to quickly bring up each person's data. Open the Page Options menu in the upper right of each page, click 'Save Current Customizations' and follow the instructions to name and save the view. On later visits, open this menu and click 'Apply Customization' to retrieve your preferences.

Obtaining Help

Support is available during normal business hours from the Campus Shared Services – IT Helpdesk at calanswers-help@berkeley.edu or (510) 664-9000.