Oversight Dashboard

The PI Oversight dashboard allows those with access to view faculty-managed funds that may be in deficit. The PI Oversight dashboard includes exception reports showing funds with a current or projected deficit, funds with Anticipated Funding and faculty members who have not certified their Effort Reports for the current reporting period. It includes a direct link to PI Portfolio for each faculty member displayed.

Support

Research Administrators (RA) are the primary resource for questions about PI Portfolio. You can also contact the Help Desk with technical questions.

Help Desk: calanswers-help@berkeley.edu or 664-9000 (ext. - option 1, then option 2)

Access to the Oversight Dashboard

Access to the Oversight dashboard does not include access to write projections or access to HR data lookup by EmplID. It includes Reporting access.

To request access to the Oversight Dashboard, create a request in Cal Access (idc.berkeley.edu/ca/) Request access to PI Portfolio, then to the role called “PI Oversight.” The request will be routed to your manager, then to the L3 Approver for final approval.

Logging in

Access link: http://calanswers.berkeley.edu/pioversight

Once you click on the access link, you will enter your CalNet ID. If you are not taken directly to PI Oversight, navigate to “Dashboards” in the upper right of the screen and choose “PI Oversight” from the list.