

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.

Faculty Member	Fund Category	Fund - Desc	CF2 - Desc	Lead Principal Investigator	Balance as of Last Closed Period	Anticipated Funding	Projected Expense	Projected Balance	Projected Thru	Projections Last Updated By
Mary Melvin [1111]	Non-Sponsored	69798 - Generic STIP Income	AAAAA - Mary Melvin		-\$2,040			-\$2,040		
Sponsored	60123 - Aeronautics - Melvin	AAAAA - Mary Melvin	Mary Melvin		-\$6,604	\$50,000		\$43,396	2/29/2016	Ahsoka Tano-13-MAY-16
Sponsored	80999 - Aerobiology	AAAAA - Mary Melvin	Mary Melvin		-\$1,929			-\$1,929		

Example of how to look at **Deficits** in the Oversight dashboard

Effort Reporting Not Complete

Reporting Period: 2015 Jan-Jun

Faculty Member: Mary Melvin [1111]

Example of where to find updates on your **Effort Reporting** in the Oversight Dashboard

Faculty Member	Fund Category	Fund - Desc	CF2 - Desc	Lead Principal Investigator	Balance as of Last Closed Period	Anticipated Funding	Projected Expense	Projected Balance	Projected Thru	Projections Last Updated By
Mary Melvin [1111]	Non-Sponsored	19900 - GENERAL FUNDS	AAAAA - Mary Melvin		\$1,956	\$10,000		\$11,956	10/31/2016	Ahsoka Tano-13-MAY-16
Non-Sponsored	69799 - Unrestricted Misc Income	AAAAA - Mary Melvin			\$229,847	\$40,000		\$269,847	10/31/2016	Ahsoka Tano-13-MAY-16
Sponsored	12345 - Aeronautics	AAAAA - Mary Melvin	Mary Melvin		\$220,225	\$23,400	\$208,090	\$35,535	9/30/2017	Jeremy Linneman-18-MAR-16
Sponsored	60123 - Aeronautics - Melvin	AAAAA - Mary Melvin	Mary Melvin		-\$6,604	\$50,000		\$43,396	2/29/2016	Ahsoka Tano-13-MAY-16

Example of how to look at **Anticipated Funding** in the Oversight dashboard