

PI Portfolio Oversight Dashboard

Updated 6.7.16

Use this guide to learn how to set up your faculty list on the Oversight dashboard and how to read the PI Portfolio Oversight dashboard reports.

1. How to set up your faculty list

- Add faculty names to the Oversight dashboard
- Save your faculty names as your default list
- Remove faculty names from your default list

2. How to Read PI Portfolio Oversight Dashboard Reports

- Overview page
- Deficits page
- Anticipated Funding page
- Effort Reporting page
- Troubleshooting

Questions

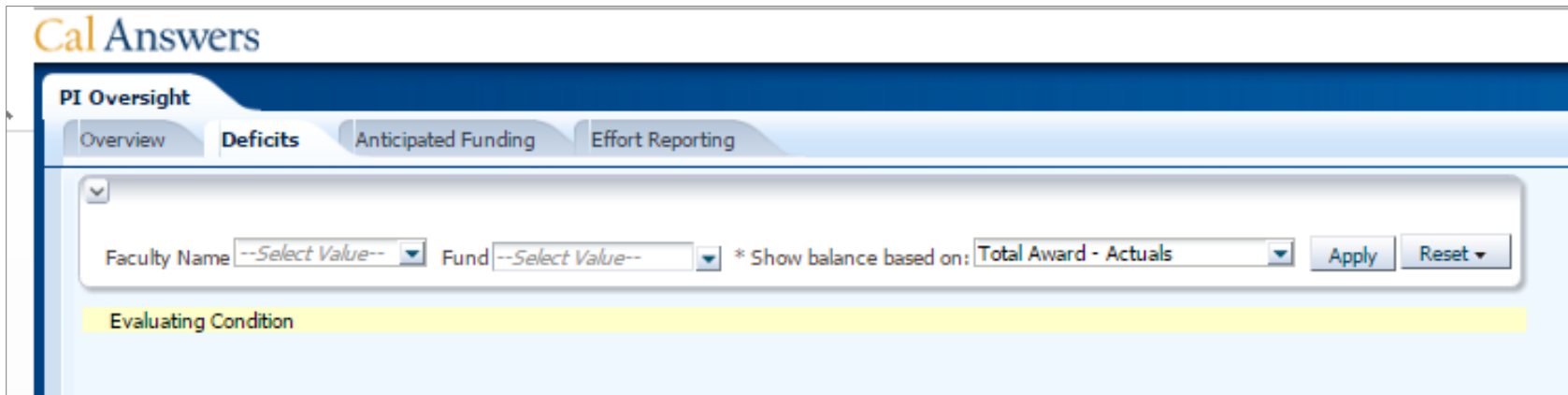
Please contact the Help Desk with questions at calanswers-help@berkeley.edu or 664-9000 (option 1, then option 2.)

1. How to set up your faculty list

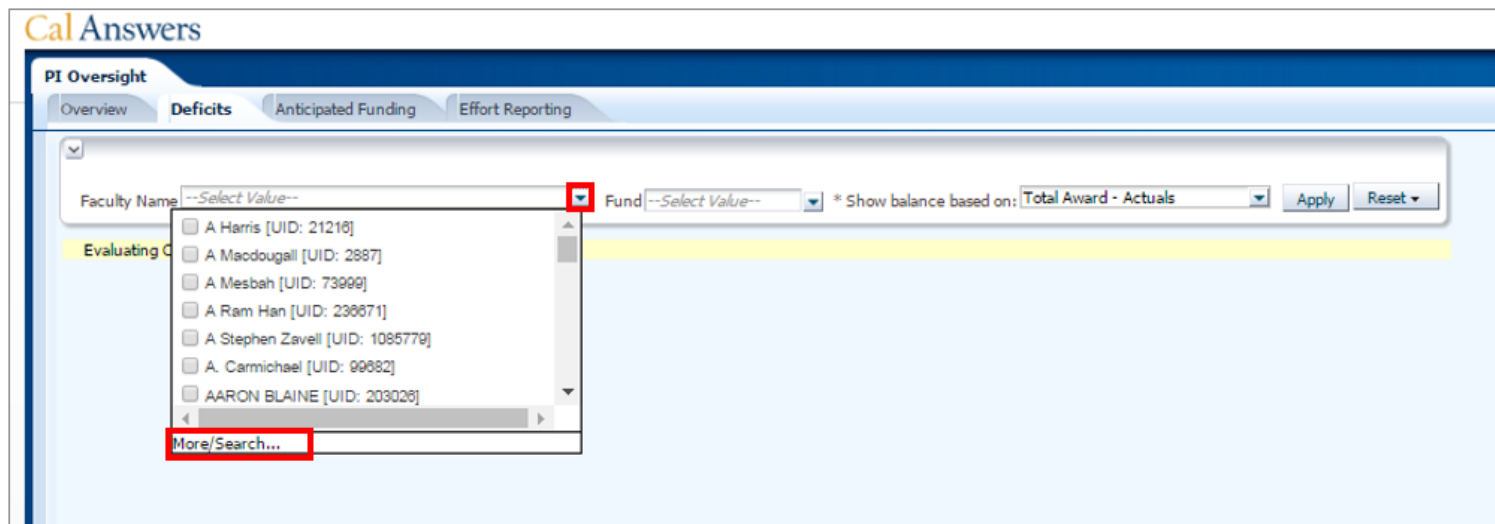
The first time you use this dashboard, you will select the faculty members for whom you have oversight access and save your selections as your default list. Then each time you login, your dashboard will run based on your selected faculty member(s). You will not have to complete these steps again unless you need to add or remove faculty from your list.

Add faculty names to the Oversight dashboard

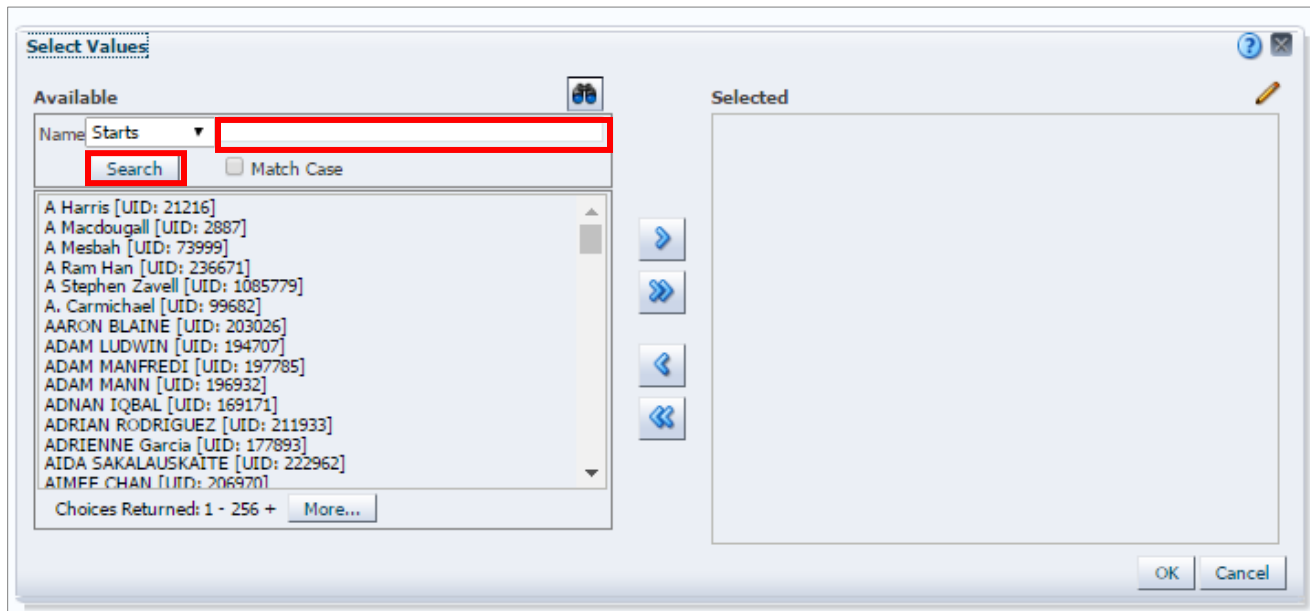
1. When you first log in, you will see the following screen without any selected faculty or Funds:



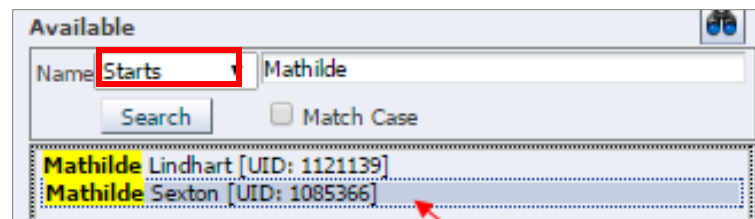
2. Click the drop down menu to the right of the faculty name search bar to view the drop down list, then click "More/Search":



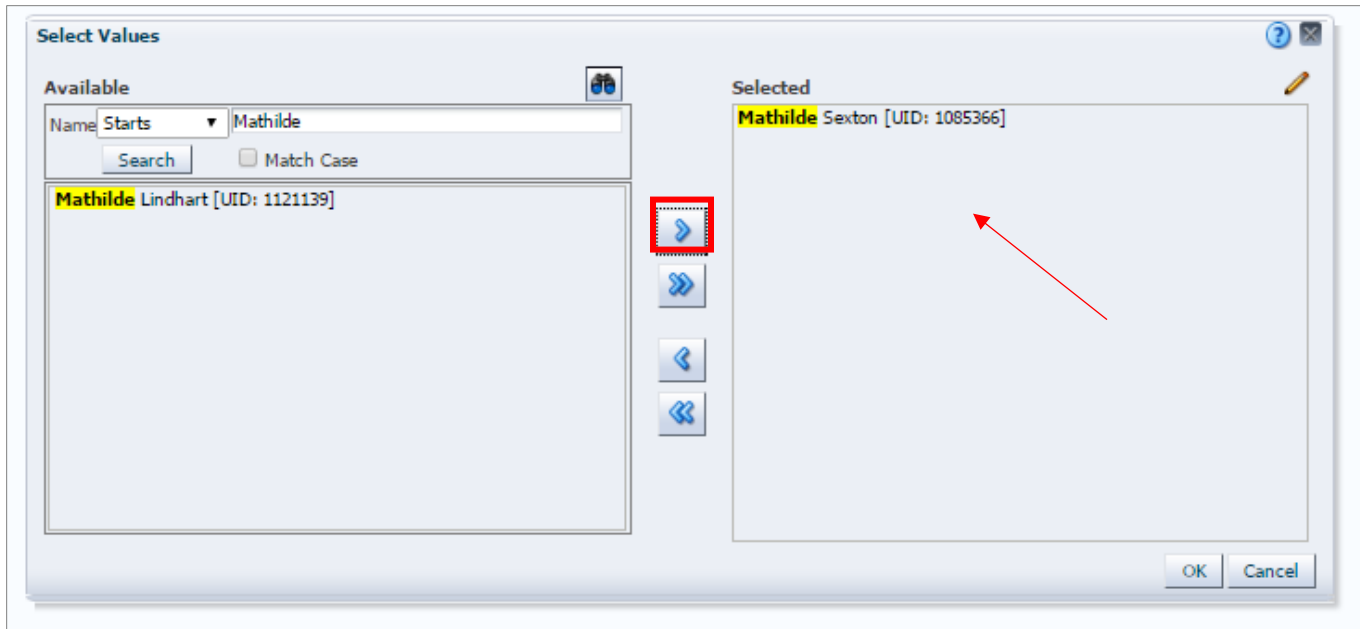
3. Type the name into the search box, then click “Search”:



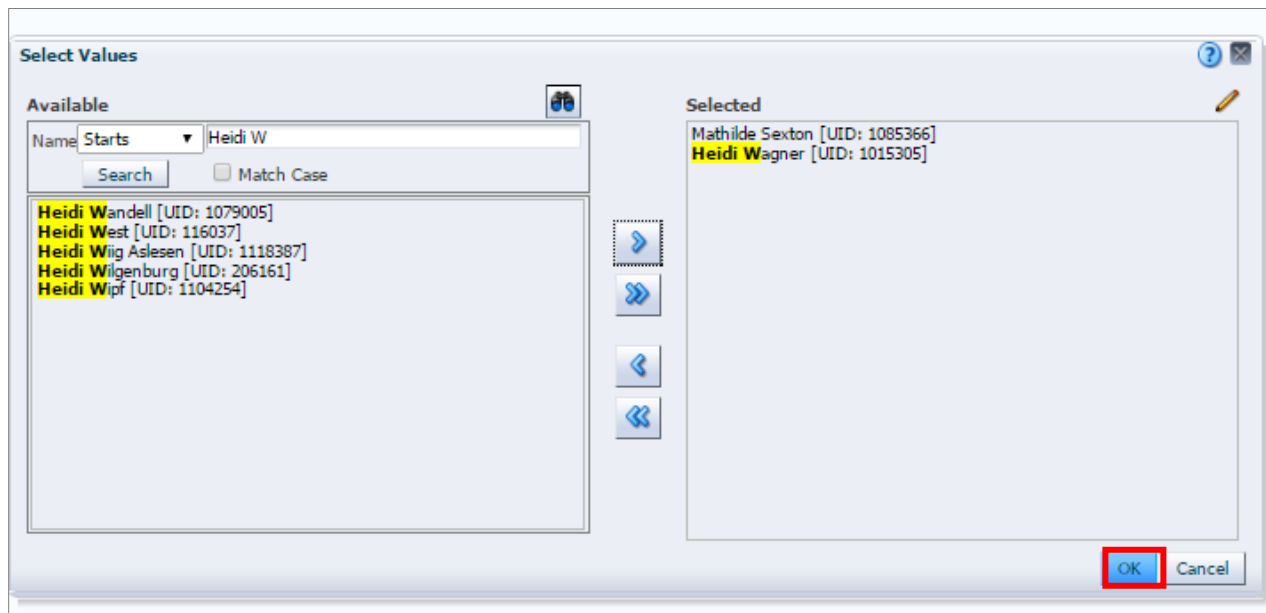
4. In the example below, I used “Starts” and typed the first name. You could change the drop down to “Contains” and type the last name. Use either method to find the right faculty name.



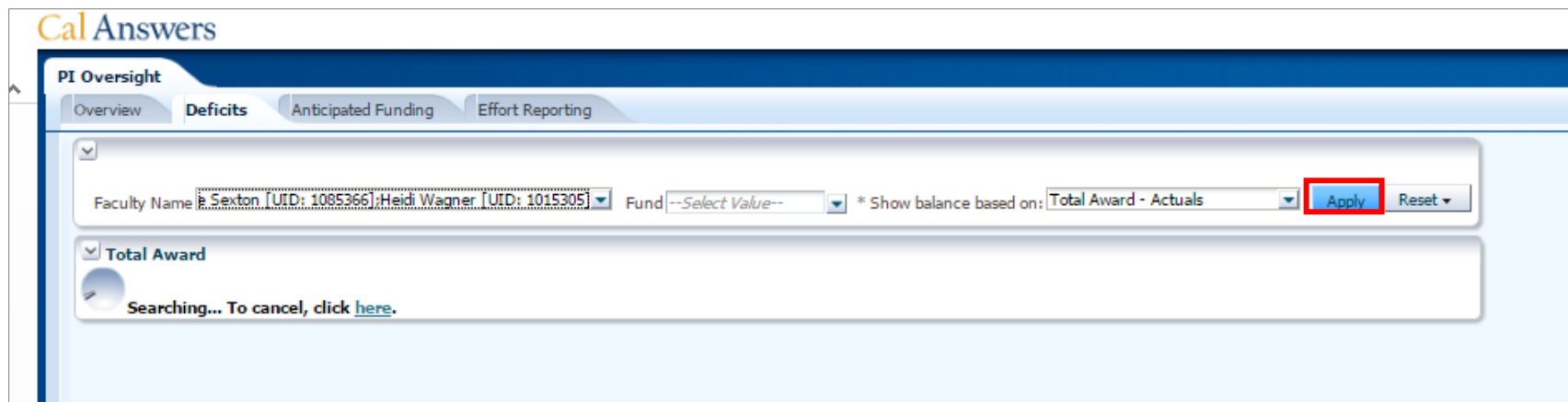
5. Highlight the name you want to select by clicking on it and then click the single triangle to move it to the “Selected” list.



6. Repeat steps 3-5 to add all the faculty names relevant to you to the “Selected” list. Click OK when your list is completed.

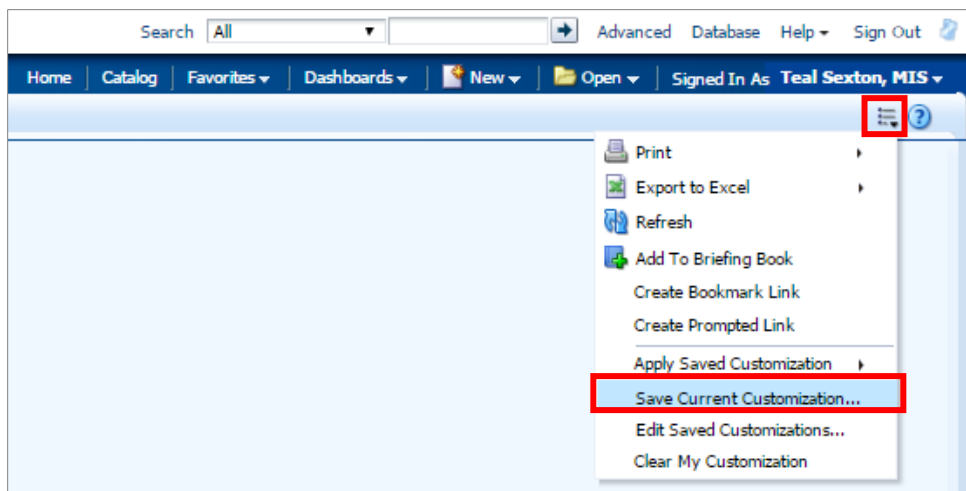


7. Back on the report screen, click “Apply” to run your Deficits report.

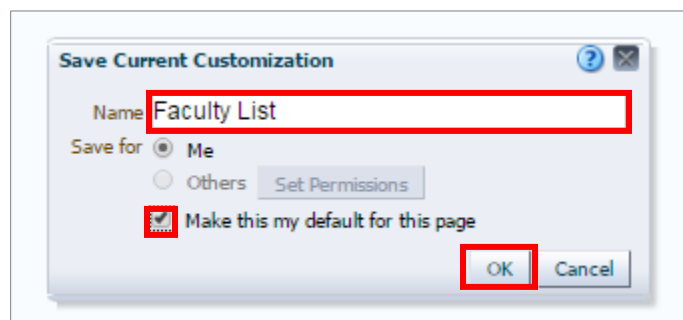


Save your faculty names as your default list

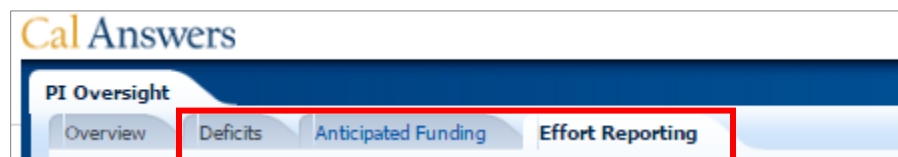
8. Now click the “Page Options” icon in the upper right corner below your menu bar and choose “Save Current Customization”:



9. Enter a name such as “Faculty List 2016” and check the box “Make this my default for this page” in the Save Current Customization dialogue box, then click OK:



10. Choose the next page of the dashboard called “Anticipated Funding” and repeat steps 8 and 9 to save your list for this page, then again for the “Effort Reporting” page. All three PI Oversight dashboard report pages need to have your “Faculty Name” list saved as the default customization:



Remove faculty names from your default list

11. To remove faculty from your saved list, simply repeat these steps and save over your list by typing the same name in step 9, or provide a new saved name, such as “Faculty List 2017,” making sure to select the latest list as your default for all three pages.

2. How to Read PI Oversight Dashboard Reports

Once you have selected the faculty members for whom you have oversight access and saved your selections, you can run reports for those included in your list. Make sure to complete the setup up your customized view before running the dashboard tabs. The reports in this dashboard run based on your selected list of default faculty members.

Overview Page

The Overview page is your starting point to access the other tabs in the Oversight dashboard. Hover over the names of the tabs to see a description and click on the name to go to that tab. If you don't see results after you are on the tab, it means that none of the faculty in your list meet the page criteria.

Cal Answers



Deficits Page

Deficits - My Allocations – Projections filter

1. Choose the filter “My Allocations – Projections.”
2. This tab shows all Fund – CF2 combinations that have a projected balance less than zero, or a balance less than zero as of last closed period. Deficits are shown in red.
3. The “Faculty Member” values are shown in blue. Click the faculty member to open the PI Portfolio page for that individual in a new browser window. (See last section of this guide for troubleshooting this feature.)

Cal Answers

PI Oversight

Overview **Deficits** Anticipated Funding Effort Reporting

Faculty Name: Fund: * Show balance based on:

My Allocations

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		
	Sponsored	90123 - Dynamics of Aeronautics	AAAAA - Mary Melvin	Mary Melvin	\$899		\$1,500	-\$601	3/31/2016	Ahsoka Tano-17-MAY-16

[Refresh](#) - [Print](#) - [Export](#)

Deficits – Total Award Actuals filter

4. Choose the filter “Total Award – Actuals.”
5. This tab shows all Sponsored Funds that have a current balance less than zero.
6. Click a blue “Faculty Member” value to open the PI Portfolio page for that individual in a new browser window.

Cal Answers

The screenshot shows the 'PI Oversight' interface with the 'Deficits' tab selected. The 'Faculty Name' is set to 'Mary Melvin [1111]' and the 'Fund' is '80999'. The filter is set to 'Total Award - Actuals'. A table below shows the following data:

Faculty Member	Fund - Desc	Current Balance
Mary Melvin [1111]	80999 - Aerobiology	-\$1,929

Buttons for 'Refresh', 'Print', and 'Export' are visible below the table.

Anticipated Funding Page

This tab shows all Fund – CF2 combinations that have Anticipated Funding entered into the Projections Input Form.

7. Click a blue “Faculty Member” value to open the PI Portfolio page for that individual in a new browser window.

Cal Answers

The screenshot shows the 'PI Oversight' interface with the 'Anticipated Funding' tab selected. The 'Faculty Name' is 'Mary Melvin [1111]' and the 'Fund' is '--Select Value--'. A table below shows the following data:

Faculty Member	Fund Category	Fund - Desc	CF2 - Descr	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	\$19,089	\$250,758	10/31/2016	Leia Organa-31-MAY-16
	Sponsored	12345 - Aeronautics	AAAAA - Mary Melvin	Mary Melvin	\$220,225	\$23,400	\$40,017	\$203,608	9/30/2017	Leia Organa-31-MAY-16
	Sponsored	60123 - Aeronautics - Melvin	AAAAA - Mary Melvin	Mary Melvin	-\$6,604	\$50,000		\$43,396	2/29/2016	Ahsoka Tano-13-MAY-16

Buttons for 'Refresh', 'Print', and 'Export' are visible below the table.

Effort Reporting Page

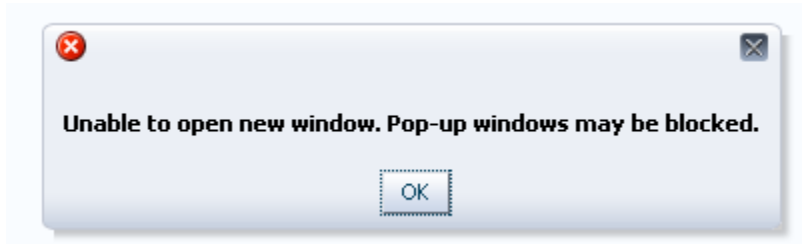
This tab shows all faculty members who have not completed all their Effort Reporting Certifications (in ERS) for the last reporting period (or the current reporting period, if it is open.) This tab includes a link to the ERS system as well as links to helpful webpages about Effort Reporting.

Cal Answers

The screenshot displays the 'PI Oversight' interface with the 'Effort Reporting' tab selected. At the top, there are navigation tabs for 'Overview', 'Deficits', 'Anticipated Funding', and 'Effort Reporting'. Below these, a search bar shows 'Faculty Name' with a dropdown menu containing 'Mary Melvin [1111]', an 'Apply' button, and a 'Reset' button. The main content area is divided into three sections. The first section, highlighted with a red border, contains the text 'Effort Reporting Not Complete' in blue, followed by 'Reporting Period: 2015 Jan-Jun' in bold black, and a 'Faculty Member' dropdown menu with 'Mary Melvin [1111]' selected. The second section lists links for 'Effort Reporting System: Login;', 'Introduction: UC Berkeley Faculty;', 'Controller's Office: Effort Reporting;', and 'Training materials: ERS Training;'.

Troubleshooting the faculty name feature to open PI Portfolio in a new browser window

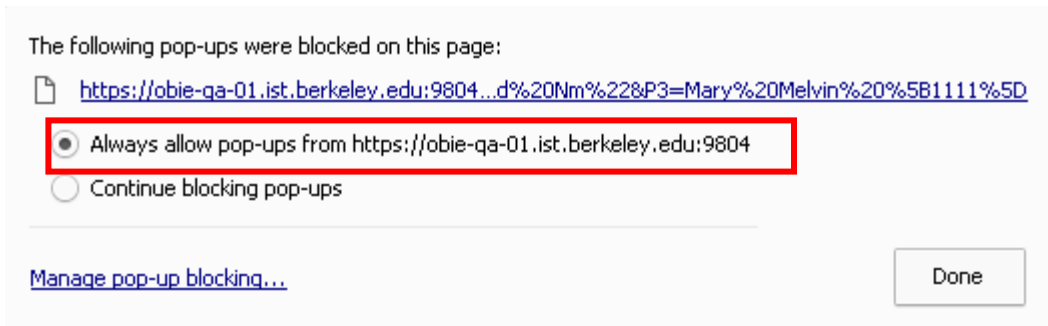
8. If you get this error message:



9. You will see this in your Chrome browser:



10. Click the red X and choose: "Always allow pop-ups from..."



11. Click the faculty name value again and it should open PI Portfolio successfully this time:

CalAnswers Search

PI Portfolio Home | Catalog | P

Overview **Portfolio** Fund Summary Transactions By Month Personnel Projections Burn Rate HR Lookup

Filters

Faculty Name **Mary Melvin [1111]** * Show balance based on: **My Allocations - Actuals**

The Last Closed Period is November, 2015.
Today is June 08, 2016

Sponsored Awards

Select View **Summary by Fund**

Fund Number	Award Description	Project Start Date	Budget End Date	Project End Date	Budget	Spent To Date	Encumbrances	Balance	% Remaining Balance
12345	Aeronautics in Space	09/30/2014	09/29/2016	09/29/2017	\$357,659	\$139,987	\$0	\$217,672	61%
60123	The Economy of Aeronautics	03/18/2016	03/31/2016	02/23/2017	\$75,000	\$71,604	\$0	\$3,396	5%
70123	Aeronautics in Star Wars	07/01/2015	06/30/2018	03/31/2016	\$6,164,958	\$711,194	\$188,392	\$5,265,372	85%
80999	Historical trends in Aerobiology	01/01/2012	12/31/2014	04/15/2017	\$297,171	\$299,100	\$0	-\$1,929	-1%
90123	Research into the Dynamics of Aeronautics	07/01/2013	06/30/2015	02/15/2016	\$21,000	\$20,101	\$0	\$899	4%
Grand Total					\$6,915,788	\$1,241,986	\$188,392	\$5,485,410	79%

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Non Sponsored Funding

Summary By Fund

Fund Number	Fund Description	Total Budget	Current Year Spent to Date	Encumbrance	Balance
19900	GENERAL FUNDS	\$5,977	\$4,021	\$0	\$1,956
69798	Generic STIP Income	\$0	\$2,040	\$0	-\$2,040
69799	Unrestricted Misc Income	\$240,884	\$13,321	\$0	\$227,563
Grand Total		\$246,861	\$19,382	\$0	\$227,479

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Sponsored Awards Chart

Legend: Spent To Date % (dark blue), Time Elapsed % (gold), 100% (red line)

PI Oversight: Anticipated Funding > PI Portfolio: Portfolio

12. Click the breadcrumb at the very bottom left of the page to go back to PI Oversight, or simply tab back to the other browser window.