

PI Portfolio @ RAC Forum

September 4th, 2013

PI Portfolio Agenda

Goals for today

- Overview of PI Portfolio purpose and phases
- Demo of PI Portfolio
- Things to be prepared for
- How security will work

Today is not a training session

PI Portfolio Vision

Vision

Provide PIs with a user-friendly tool to access their fund balances, detail and forecasts in one place, allowing them to make good spending decisions, comply with sponsors, and save time.

Benefits

- Check how much money is available, at any time
- Monitor funds for the rate of spending (too fast or slow)
- PI login automatically delivers all relevant award data; RAs have full access for the PIs they serve
- Oversee financial compliance with sponsor's requirements
- One standard tool across all dept. improves consistency
- Input projected spending to determine a future balance (Phase 2)
- Streamline process to leave more time for research and teaching

PI Portfolio Background

- **Key Stakeholders**

- Sponsors:
 - Delphine Regalia - Controller's Office
 - Patrick Schlesinger - Research and Compliance
- Faculty Advisory Committee consulted for all key decisions
- Research Administrators have played a key role in design and implementation

- **Influences**

- UCLA, UCSF, Harvard
- Internal systems developed by research units

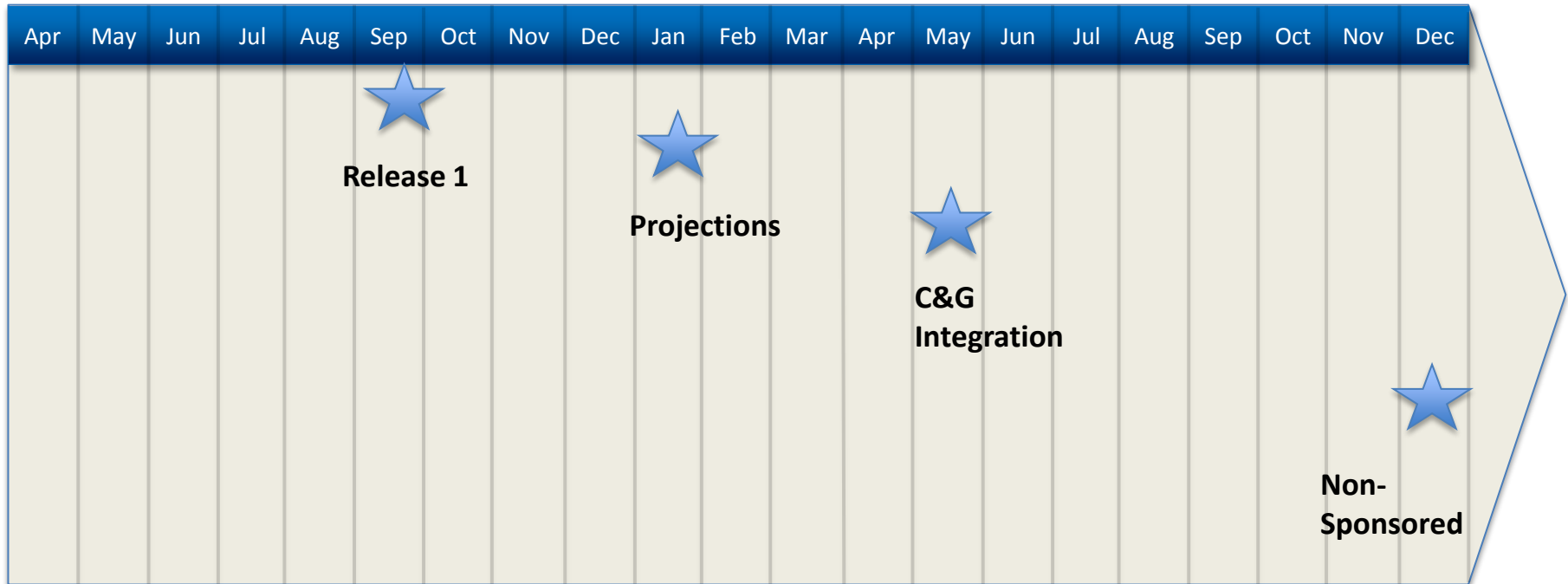
- **Technology**

- Built within Cal Answers

Overall Project Timeline

2013

2014



Things to be prepared for

- Some differences from BAIRS
 - BAIRS Security is more restrictive (by dept_id, and run by CF2)
 - Reports typically run for last closed month rather than to date.
 - Faculty need to understand that overhead and payroll come in late.
 - Accounting periods rather than document date.
- Unexpected Data
 - As access is currently via spreadsheets that RAs can “clean up” faculty may not be used to seeing the unvarnished truth
- Browser questions

Things to be prepared for

- Chart Field 2
 - Finding the right values for PIs
 - Understanding when to filter by CF2
- Security Questions
 - Are you seeing the right amounts

Security

- Access that will be automatically setup
 - PIs and Co-PIs named on the award
 - RAs in Shared Services
 - Administrators in SPO and EFA
- Access requests will need to be made for
 - Local RAs
 - Other collaborators on the fund (e.g. researchers who are not named Co-PIs, lab managers)
 - New CSS RAs and central administration after the initial load