PI Portfolio

Providing investigators with a user friendly tool to access awards, budgets, expenses and balances to make good spending decisions, comply with sponsors and save time.

Reference Information:

- 9/18 is when the system is available
- For information go to http://Calanswers.berkeley.edu/piportfolio
- If you need help, contact the help desk at calanswers-help@berkeley.edu or 664-9000 (press #1, 2, 2)
- The current release contains budgets and actual expenses (updated nightly). Future versions will handle projections and non-sponsored funds.

Checklist for Research Administrators

- ☐ If you were not setup automatically (those in CSS will be) ask your PIs to request access on or after the 9/18.
- ☐ Once you have access, make sure you can login and see the PIs that you expect.
- ☐ Familiarize yourself with the tool in case the faculty you work with have questions.
- ☐ Review each of your PI's portfolios. Is there any data in BFS that needs to be "cleaned up" for faculty to view?
- ☐ Save configurations for your PIs to quickly call up their portfolio
- ☐ If your PI is a collaborator on another faculty members grant (e.g. has an allocated budget but was not named as a Co-PI on the grant), coordinate with him or her on requesting access from that PI.

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