



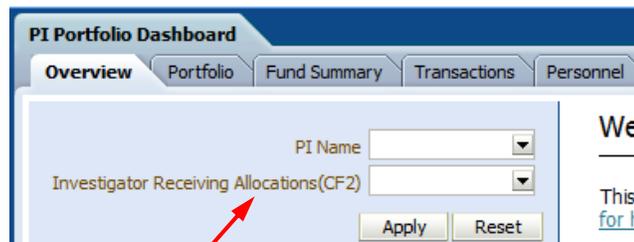
# Logging In and Using PI Portfolio

The PI Portfolio information page <http://calanswers.berkeley.edu/piportfolio> includes a login link to the tool itself, a form for PIs to grant access to RAs and collaborators, plus how-to's and training resources, service updates, and Help Desk contact information.

## Principal Investigator (PI): Log In and Retrieve Awards Data

As a Lead or Co-PI, your login automatically retrieves data for your active awards, including awards where you have allocated funds to others. To view collaborator fund data, request access from the Lead PI.

1. Go to <http://calanswers.berkeley.edu/piportfolio>, click 'Access your PI Portfolio dashboard' link and complete the CalNet authentication to automatically retrieve your data. Your Dashboard opens to the Overview page and **your name appears in the 'PI Name' field** in the upper left.



2. To include your collaborator funds (i.e., allocations where you are *not* named on the award as Lead PI or Co-PI), ask the Lead PI to grant you access to that fund. Then, click the arrow next to the 'Investigator Receiving Allocations (CF2)' field, select your name, click 'move' then 'OK' the selection. Then **click 'Apply' to retrieve the data.**

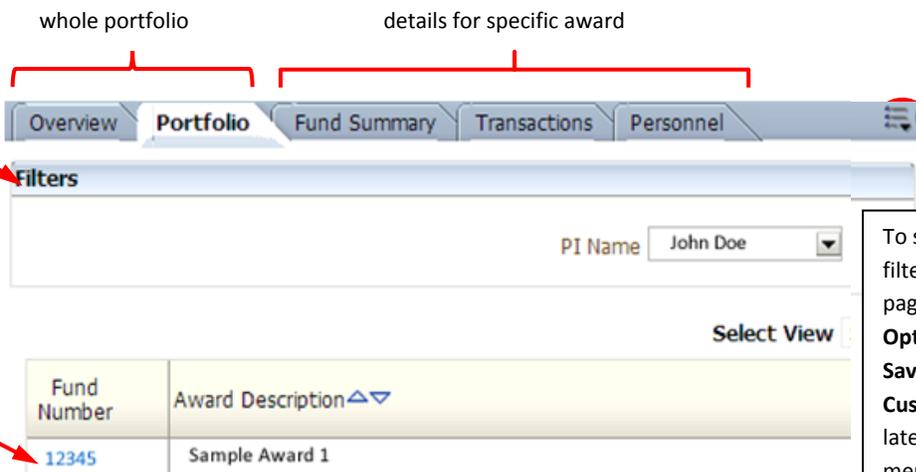
- a. Note: Once access is granted, your name is usually sufficient to retrieve your allocations data. However, the Investigator Receiving Allocations field (CF2) sometimes includes other information, such as an award name, depending on how it was originally entered. Use the down arrow to search using a name—or a portion of a name—to select your allocations.

## Data Views and Filters

Move between pages using the tabs in the upper left. The Overview and Portfolio pages display budget and expense data for all your awards and allocations. Details for a specific award are displayed on the Fund Summary, Transactions, and Personnel pages (enter the Fund Number at the top, or select a Fund on the Portfolio page).

Use **Filters** to further refine the data display – **be sure to click Apply**. Different filter options are available on each page.

Clicking a **Fund Number** on the Portfolio page determines the fund data displayed on the details pages.



Use **Select View** to expand and organize the data displayed on each page.

To save your views and filter setting for each page, open the **Page Options** menu and click **Save Current Customizations**. On later visits, open this menu and click **'Apply Customization'** to use your settings.

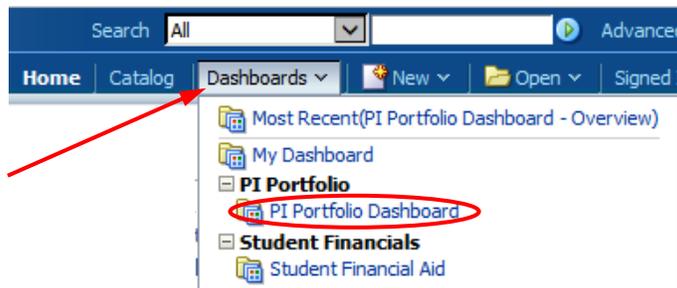


## Local Research Associates (RAs): Get Access First

Lead PIs (named on the award) must grant access to RAs and support staff *before* they can access fund data. (Note: RAs in Shared Services have automatic access to all funds.) The PI may grant access to all their funds or to specific funds using the form on <http://calanswers.berkeley.edu/piportfolio>. Your access must be established before you can log in.

## RA Log In and Retrieve Awards Data

1. Go to <http://calanswers.berkeley.edu/piportfolio>, click 'Access your PI Portfolio dashboard' link and complete the CalNet authentication. The tool opens to the Cal Answers application (pictured here).



2. In the upper right, open the Dashboards menu and select 'PI Portfolio Dashboard' to open your Overview.

3. On the Overview page click the arrow in the 'PI Name' field in the upper left. Search for and highlight the PI name (or multiple PIs' names if you are authorized) and click 'Move' to select the name(s). Then 'OK' your selection and **click 'Apply'** to retrieve Lead PI and Co-PI fund data.



Retrieve Lead PI and Co-PI fund data by selecting name(s) in this field.

Retrieve allocated fund data by selecting name(s) in this field.

4. Add collaborator allocations (i.e., not the Lead PI or a Co-PI funds) using the 'Investigator Receiving Allocations (CF2)' field. Click the arrow to search and select one or more names. Then **click 'Apply'** to retrieve the data.  
a. **NOTE:** an investigator's name is usually sufficient to retrieve allocation data. However, the Investigator Receiving Allocations (CF2) field sometimes includes other information, such as award name, depending on how it was originally entered. Use the down arrow to search using a name—or a portion of a name—to retrieve all relevant Investigator Allocations (CF2) data.

Check if all the active awards you expect to see are included on the Portfolio page. If awards are missing from the Portfolio, the Lead PI named on that award must first grant you access. Once access is granted, make adjustments to reports by adding or removing PI names or fund names in the filter fields at the top **and click 'Apply.'**

## Customize and Save Multiple Data Views

Each page offers filters and selection options to customize the data display. You can save multiple different views for each page. Open the **Page Options** menu in the upper right of each page, click '**Save Current Customizations**' and follow the instructions to name and save the view. On later visits, open this menu and click '**Apply Customization**' to retrieve your preferences.

