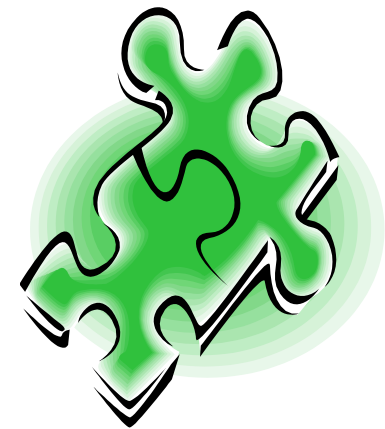


PI Portfolio Phase II

RAC Forum
March 12th, 2014

What's new?

- Non-Sponsored Faculty Funding
- New & Changed Reports
- New Security and method for access requests
- Requires review of the data and communication with faculty



Portfolio Page

Filters

Faculty Name: * Where I am a PI include:

No CF2 filter!

Sponsored Awards

Select View:

Fund Number	Award Description	Project Start Date	Budget End Date	Project End Date	Budget	Spent To Date	Encumbrances	Balance	% Remaining Balance
98765	Current State of Hibiscus Invasion at Torrey Pines State Natural Reserve	08/16/2012	08/15/2015	08/15/2015	\$41,000	\$25,148	\$0	\$15,852	39%
98766	Pheromone Lures for Brown Marmorated Stink Bugs	10/01/2013	05/31/2014	05/31/2014	\$10,321	\$2,200	\$0	\$8,121	79%
Grand Total					\$51,321	\$27,348	\$0	\$23,973	47%

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Non Sponsored Funding

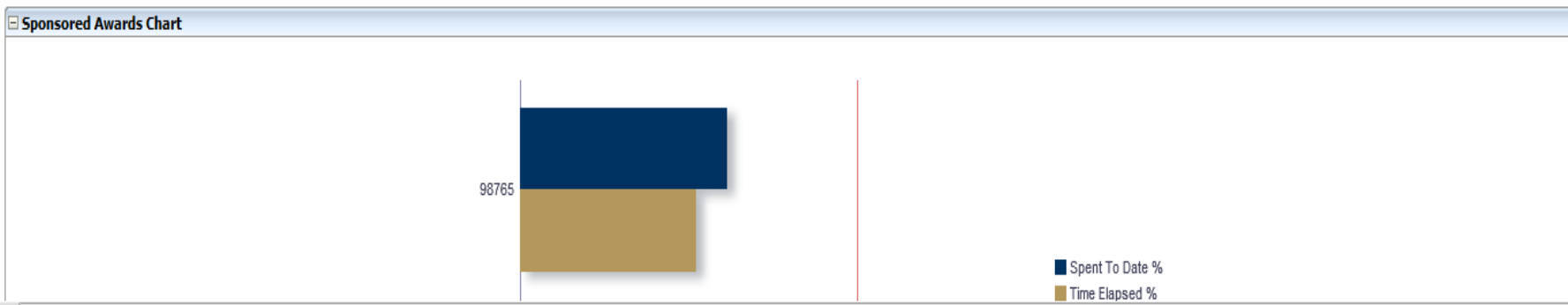
Summary By Fund

Fund Number	Fund Description	Total Budget	Current Year Spent to Date	Encumbrance	Balance
19900	GENERAL FUNDS	\$388	\$0	\$0	\$388
19936	Campus Designated GF - BK	\$2	\$0	\$0	\$2
36190	HARE RALPH ENDOWMENT FUND	\$228	\$0	\$0	\$228
41660	N8320 COLL NATURAL RES ANNUAL	\$121	\$0	\$0	\$121
62054	NR-CSR-D-SUMMER SERIES	\$15	\$0	\$0	\$15
Grand Total		\$754	\$0	\$0	\$754

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Sponsored combines allocations view and full fund

New Report



New "By Month" Page

Summary by Month

		2013 Apr	2013 May	2013 Jun	2013 Jul	2013 Aug	2013 Sep	2013 Oct	2013 Nov	2013 Dec	2014 Jan	2014 Feb	2014 Mar
	Expense Type												
Direct Expenses	General Supplies	\$0		\$2,331		\$0			\$1,759				
	Travel Foreign								\$587	\$2,430			
	Misc Expense & 577XX												
	Pymts Students/Stud Aid						\$6,000	\$0					
	Unallocated							\$0					
Direct Expenses Total		\$0		\$2,331		\$0	\$6,000	\$0	\$2,346	\$2,430			
Total													
Grand Total		\$0		\$2,331		\$0	\$6,000	\$0	\$2,346	\$2,430			

[-Print](#)

Reporting based on Attributed CF2s

What faculty will see:

- Transactions where the CF2 has been attributed with his or her ID (PI/FAC)
- Sponsored funds where he or she is a PI or CoPI (unchanged)

What this means:

- Many faculty will work fine
- Some faculty CF2s will need to have their BFS attribute revised
- Some funding may require journaling balances to the correct CF2 and steps to ensure CF2 is used in the future
- Communicate with faculty about when it is ready for them to view!!

New Security Access

Most users will not need new security: If you could see a faculty member's funds you will see their CF2s

Role	Current Access	After new release
Faculty	Automatic Access to funds if PI or Co-PI	+ Automatically see their attributed CF2s
CSS RA's	Access to all their faculty	+ Automatically see their faculty's attributed CF2s
Local RA's & Collaborators	If granted access to entire PI If granted access to fund	+ see their faculty's CF2s No new access
Central Dept. Staff	None	Access all faculty awards and CF2s



New Security Access System

- CalAccess is the new campus wide platform
- Two Workflows:
 - 1) User who needs access makes request → Faculty Approve
 - 2) Faculty add additional users themselves
- Friendly lookups for values such as funds and faculty
- Provisioning is automatic after approval
- Recipients are automatically emailed with status. Approvers get weekly reminders.

Cal Access Entry Screen

Provide Access Request Details

PI Portfolio for Joshua M Blatt [Ⓢ] (Request #7281)

Please provide details on what **Joshua M Blatt [Ⓢ]** will access when using **PI Portfolio**. First, choose a Role (you can add more than one role by clicking the plus sign **+**). If the selected Role requires more access details, additional choices will appear in the row next to the Role. When all the selections in a row are complete, the **red** border to the left of the row will turn **green**. For an explanation of the roles, see the [Role Definitions](#) documentation.

Roles

Role [Ⓢ]	Type of Access	
<input type="text" value="Collaborator"/>	<input type="text" value="By Faculty Member"/>	<input type="text" value="Type the name (or code) of a Faculty Member..."/> <input type="button" value="-"/> <input type="button" value="+"/>

Submit

« Back to Dashboard

Questions or Comments..

Training and Documentation

- Optional classroom trainings will be scheduled soon
- Video demonstration will be on the website
- New *User Guide* will cover the new features

Questions or Comments

Contact the helpdesk

email: calanswers-help@berkeley.edu

Phone: 664-9000