



# PI Portfolio

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# Agenda

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- Background and Purpose
- Accessing PI Portfolio
- Demo
- Q & A

# Background and Purpose

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- **What is PI Portfolio?**
  - Excel report of all awards and proposals that a PI or faculty member is named on
  - Grouped by stages of project life cycle (active awards, awards in process, pending proposals, closed/expired awards, not funded proposals)
- **What data is available?**
  - Proposal and award demographic data from PATS
  - Expenditure, AR, and other accounting data from Financial System
- **How does the tool help PIs and administrators?**
  - Prepare for PI transferring out or going on leave from UCLA
  - Report on Other Support and/or Current and Pending Support
- **Where can you go to download PI Portfolio?**
  - ORA PI Portal

# Accessing PI Portfolio

## Where

### PI Portal

- [PIPortal.research.ucla.edu](http://PIPortal.research.ucla.edu)
- Use UCLA Single Sign-On
- “My Home” tab

## Who

### Researchers & Admin.

- Faculty researchers who are named on a proposal or award as PI, Co-Investigator, or other role.
- Administrators and fund managers who have delegated access

## What

### Data Confidentiality

- PI has full access
- Two versions for administrators to protect data confidentiality
- Proposal data only available to those with appropriate delegated access.

## How

### PI Delegation

- Ask your PI to delegate access
- Contact ORA if you encounter system issues

# Demo

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# Any Questions?

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## Contact Information

### Website URL

<https://piportal.research.ucla.edu/>

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### Marcia Smith

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