

## Instructions for Granting Access to the PI Dashboard

Principal investigators (PIs) will automatically have access to the PI Dashboard in InfoPorte, as long as they are the lead PI for at least one sponsored project. Research administrators can have access to see the same view as the PIs that he or she supports. When you are setting up a research administrator's access to dashboards, you need to grant access for each PI individually.

**Note:** As an InfoPorte Administrator, you can grant access to the dashboards of any PIs who are in your school or division. In other words, you're not granting access based on the research administrator's home department but on the PI's home department. For example, if you are the InfoPorte Administrator for the School of Medicine and the PI's home department is in the School of Medicine, only you can give a research administrator access to see that PI's dashboard. It doesn't matter where the research administrator's home department is.

Follow these steps to grant a research administrator access to a PI's dashboard:

1. In InfoPorte, go to Settings > Permissions > Access.




2. Type the research administrator's name or PID in the User field.

User   
"Last, First" or "First Last" or PID

3. Enter the PI's name or PID in the Employee Field.

4. Click the **Function** dropdown and click the plus sign next to Home.


**Choose one or more functions:**

Function (select) 

- Cores
- Faculty
- Finance
- HR
- Home
- Inbox
- Settings
- Student
- Tools

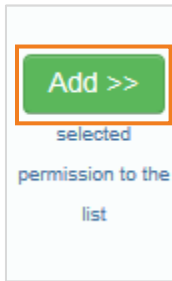
5. Mark **Dashboard**.

**Choose one or more functions:**

Function Dashboard 

- Cores
- Faculty
- Finance
- HR
- Home
  - Dashboard*
  - School Info
  - School Reports
- Inbox
- Settings
- Student
- Tools

- Click the green **Add** button.



Result: The system displays the access in the Permissions section.

<u>Permissions for Trainwell, Amber (799999099)</u>	<u>SetID/BU</u>	<u>Field</u>	<u>Value</u>	<u>All / None</u>
Home/Dashboard	UNCCH/UNCCH	employee_id	799000100	

- If you need to give the research administrator access to more PI's dashboards, repeat steps three through six.

Result: The next day, when the research administrator logs in to InfoPorte, the dashboard for the first PI in the Principal Investigator list displays as his or her home page. The research administrator can use the drop-down list in the top left corner of the screen to choose another PI. As a reminder, a research administrator can only see one PI's dashboard at a time.

