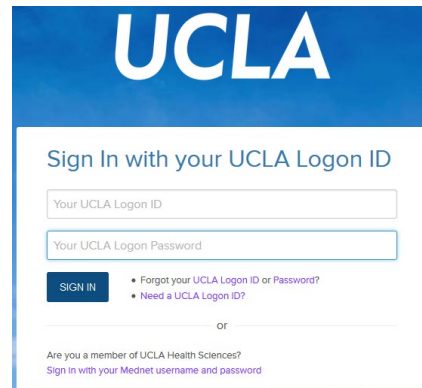


ASSIGNING FUND MANAGER ACCESS TO THE PI PORTAL

Revised February 14, 2022

1. PI logs into the PI Portal using their UCLA login ID - <https://piportal.research.ucla.edu/>



2. Click on the “Settings” link at top right corner.
3. Enter Fund Manager’s Name or University ID (UID)* & click Search. * best option
4. Click on the “Add” button.
5. On the pop-up box, click the feature(s)** to delegate & Save. **recommend all possible/active features

The screenshot shows the PI Portal interface with the following elements:

- Settings:** A red box labeled '1' highlights the 'Settings' link in the top right corner.
- Search:** A red box labeled '3' highlights the search fields for Name (containing 'raellen man') and UID.
- Add:** A red box labeled '4' highlights the 'Add' button in the 'Grant additional users access' section.
- Delegate Access Pop-up:** A red box labeled '5' highlights the 'Feature Delegation' section, which includes several checked options:
 - My Proposals
 - My Funds
 - My Agreements
 - My Deliverables
 - My Protocols - IRB
 - My Protocols - ARC
 - My PHS Disclosures
 - My Inventions
- Save:** A red box highlights the 'Save' button at the bottom right of the pop-up window.