1. Purpose of the Project Module

The purpose of this module is to organize all information related to a Project in a clear, concise and efficient manner. Properly setup, the Project Module is an excellent organizational tool, a source of useful information and a time saving device. This manual is designed to provide all the tools needed to help users fully utilize the features and functions of GUS.

A Project is a means of organizing and tracking awards including their budgets, expenses, personnel, applicable award conditions – everything necessary to manage an award, its progress, any changes or updates, and ultimately its close. The Project Module is the basic financial unit in GUS. Often a single project will correspond to an account-fund combination, but a single account and fund might be broken into many projects (e.g. departmental 19900 funds).

Note from GUS Authors: We hope that you will take the time to read this documentation prior to setting up your first Project. We have attempted to create a manual that is user friendly – informative yet easy to read and navigate. Please feel free to email support@gus.ucsb.edu or call us (805) 893-5219 with any suggestions on how to improve this document. It is our mission to provide excellent, friendly and useful support and information to our users at all times.

2. Getting Started

It will be very helpful to first read and gather all the information in III.B. Information to Gather Prior to Entering Projects into GUS. This section provides you with a map of all required information and a cross reference of where to find detailed instructions on 1) a specific definition of the information that is being asked for, 2) how to decide what information to enter, 3) how to enter the data.

Some examples of information to gather together are: agency name, contract start and end dates, total funding, title of project, fiscal year (if applicable), project type and funding type, PI(s) involved and budget information to include account fund number, subaccounts, funding allocations, object codes, overhead rate, type codes, etc.
3. **Setting Up a Project**

To set up a project, from the menu bar at the top of the GUS main menu screen click on Project. From the drop down window, click on Projects.

At the bottom of the project display form click the "New Project" button or type Control-N (PC) or Command-N (Mac).
There are five tabs for setting up, and editing, projects: Award Information, Budget Information, Misc (Miscellaneous), Addtl Notes (Additional Notes) and Logs.

Proceed to Section II.C.3.a. Project – Setting Up a Project