5. PIs

Principal Investigators (PIs) are the people responsible for managing funds for projects. The PI area of GUS is where the information related to each PI is entered.

a. Add or Edit a PI

To add a PI, click on ‘Project’ from the top menu bar and then ‘PIs’ from the pull down menu. This will open the list of PIs for the department.

Click on the ‘New’ button at the bottom of the screen and this opens the PI Setup screen.
1. PI Information

Enter the following information:

**PI Id** – Nickname for the PI. Keep it simple e.g. initial and name - 'J. Smith'

**PI Code** – Two or three letter code for the PI. Often this consists of initials.

**Name** – First, Middle and Last Name

**Status** – Active or Inactive

**Home Department** – Choose from the list of Departments

**Title** – Professor, Researcher, Postdoc, Academic Coordinator

**Phone Number** – UCSB phone number 893-xxxx

**Alternate Phone Number** – Cell phone or other number (if desired)

**Fax Number** – Number to receive faxes

**Primary email address** – Enter the best email address to use to contact PI. This address will be used by GUS email functions and is required to get Web reports.

**Location/Address** – Office address

**Notes** – Add any desired notes

When you have finished entering all information, click on [OK] to save your work or [Cancel] to exit without saving.

To delete an existing PI, select their name from list of PIs by highlighting it. Double click on their name to open their record and select [Delete PI]. When asked ‘Are you sure you want to delete this PI’ click [OK] to delete or [Cancel] to return to the PI without deleting.

2. Related Projects

All projects related to a specific PI are listed here. There are two categories: First PI and Alt (Alternate) PI. GUS manages these lists.

**Notes** – Add any desired notes

3. Related Reports

All reports defined under Projects are listed here. Reports can be printed or emailed, separately or combined. The Reports Received by the Person can be viewed by Project: FY, Project Status and name of Report. Reports are added in the Project setup form.

**Notes** – Add any desired notes

4. Others

Lists current total for the following categories:

**Proposals** – Total number of proposals submitted and pending

**Awards** – Total number of awards awarded

**Award Matches** – Total awards with matching funds

**Inventory Items** – Total inventory items

5. Log

This screen retains a history of the data and provides an audit trail by tracking changes to this project, by whom and when.