**PI Setup**

Add a Principal Investigator (PI) to the SmartGrant database

* Profiles 🡪 Personnel 🡪 Add a New Personnel



* With ID prompt, input P.I.’s W# 🡪 Select
	+ To lookup W#: go to eWeber Portal 🡪 Administrative Access app 🡪 click on Sponsored Projects 🡪 under “Select Function” dropdown, select User Maintenance 🡪 Search via Last Name 🡪 copy W#



* In “Personnel Demographic Information” screen view under “Personnel Basic Info” tab, input the following fields:
	+ First Name
	+ Last Name
	+ Institution Affiliation 🡪 Weber State University
* In “Personnel Demographic Information” screen view under “Personnel Dept & Pay” tab 🡪 click Add 🡪 input the following fields:
	+ Department
	+ E-mail
	+ Appointment Type
	+ Statue
	+ Fringe Type
	+ FTE%: this field determines the department commitment time and is usually 100% or 50%
		- To confirm Appointment and Fringe Types, go to eWeber Portal 🡪 Reporting 🡪 Argos Web Viewer 🡪 Budget – Campus Access 🡪 Benefit Analysis by Individual 🡪 enter today’s date and W# 🡪 click Benefit Analysis by Individual Report 🡪 Run
* Click Update 🡪 OK

**To setup a PI login access:**

* Profiles 🡪 Security
* Enter in “Name or ID” field the PI’s name in all caps first & last: FIRSTLAST 🡪 Add new
* In the “Security Profile” view under “General Profile Setup” tab, enter the following fields:
	+ Expiration Date: this can be a date in the future, like 1/1/2035
	+ Name: First Last
	+ Password: enter whatever, like OSP123
	+ Department
	+ E-Mail
	+ Only Institution
	+ PostAward Access Level: PI.OPTS – Principal Investigators
* Update 🡪 OK
* “Investigators” tab 🡪 Add
	+ Last Name: enter last name 🡪 Search 🡪 Select correct PI
	+ Access: U – Update access
	+ 🡪 Update
* “Routing Access Info” tab 🡪 Add
	+ Levels: LP – PI
	+ Level Identifier: FIRSTNAMELASTNAME
	+ 🡪 Update