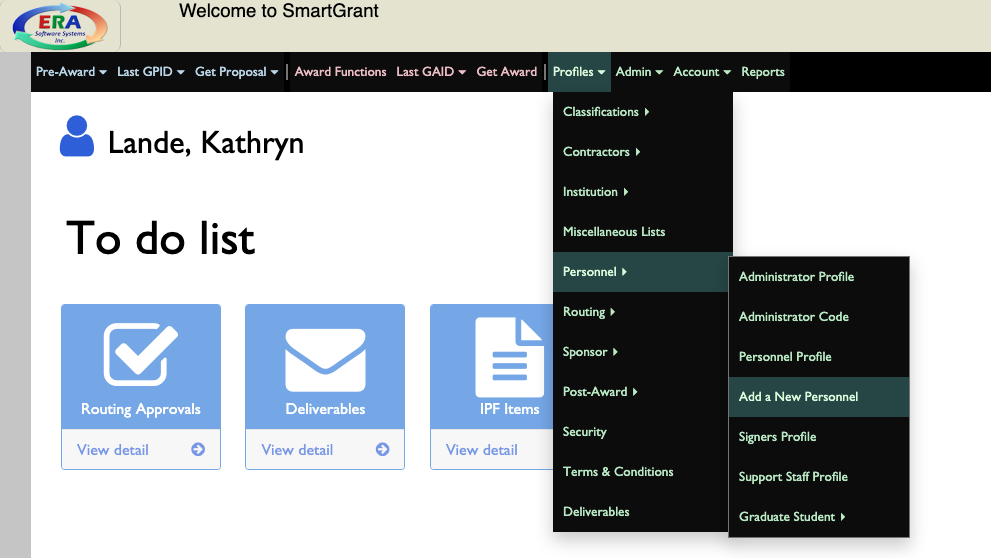
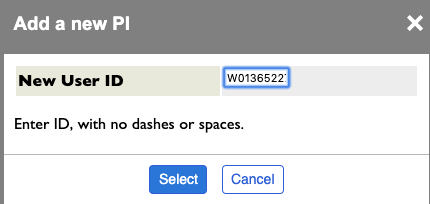
**PI Setup**

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