

How To Add/Delete Unit(s) for PI/Co-PI

- Select Key Personnel, then Personnel to expand the Key Personnel section.
- Select the PI that you would like to add/delete the unit affiliation.

The screenshot shows the 'Key Personnel' interface. On the left, a navigation menu has 'Key Personnel' highlighted with a red circle. The main content area shows two personnel entries: Chikako Takeshita (Principal Investigator) and Bryan M Wong (Co-Investigator). A red arrow points to the 'Unit Details' tab for Bryan M Wong. Below this, the 'Unit Details' section is visible, showing a table with one entry: (D01005) Chemical/Environ. Engineering Dept, Unit Number D01005, and a 'Delete' button under the 'Actions' column.

- To delete a unit, under the **ACTIONS** header, click on “Delete”, this will remove this affiliation.

This is a close-up of the 'Unit Details' section for Bryan M Wong. The 'Unit Name' is '(D01005) Chemical/Environ. Engineering Dept' and the 'Unit Number' is 'D01005'. The 'Actions' column contains a 'Delete' button, which is circled in red. The interface also shows a search bar, a 'Show 10 entries' dropdown, and export options for csv, xml, and xls.

- To add a unit, select “**Lookup/Add Multiples Lines**”.

The screenshot shows a user interface for a project. At the top, it displays the user name 'Bryan M Wong (Co-Investigator)' and '1 messages'. Below this, the project status is 'Up To Date' and the annual disclosure status is 'Approved'. A blue notification bar indicates 'Unit Details: 1 messages'. Below the notification, there are tabs for 'Details', 'Organization', 'Extended Details', 'Degrees', 'Unit Details', and 'Person Training Details'. The 'Unit Details' tab is active, showing a message: 'You have deleted an item from Unit Details.' At the bottom of the 'Unit Details' section, a button labeled 'Lookup/Add Multiple Lines' with a magnifying glass icon is circled in red.

- In the **UNIT NUMBER** field, enter the Unit number (DXXXXX) that you would like to add. In this example, D01342 represents Material Sci:Engr Pgm Dept, the department that this proposal will be routed through.

The screenshot shows a 'Unit Lookup' form. The form has several input fields: 'Unit Number' (containing 'D01342'), 'Parent Unit Number', 'Organization Id', 'Unit Name', and 'Campus Code'. The 'Active' field has three radio buttons: 'Yes' (selected), 'No', and 'Both'. A red circle highlights the 'Unit Number' field, and a red arrow points to the text 'D01342' inside it. At the bottom of the form, there are three buttons: 'Close', 'Clear Values', and 'Search'.

- Select “Search”.

Lookup ×

Unit Lookup

Unit Number:	<input type="text" value="D01342"/>	<input type="button" value="📄"/>
Parent Unit Number:	<input type="text"/>	<input type="button" value="🔍"/>
Organization Id:	<input type="text"/>	<input type="button" value="🔍"/>
Unit Name:	<input type="text"/>	
Campus Code:	<input type="text"/>	
Active:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both	

- Check the box and then select “return selected”.

Unit Lookup

- One item retrieved.
- You have entered the primary key for this table (Unit Number) in the search criteria. Since these fields can be used to uniquely identify a row in this table, the other search criteria entered will be ignored.

×

Show entries

Unit Number	Parent Unit	Organization	Unit Name	Active
<input checked="" type="checkbox"/> D01342	(DIV103) BCOE Interdivisional Pgms Dpts & Ctrs	REGENTS OF THE UNIVERSITY OF CALIFORNIA AT RIVERSIDE	(D01342) Material Sci:Engr Pgm Dept	true

Showing 1 to 1 of 1 entries

8. This completes this action.

Key Personnel

Search for and add key personnel

[Add Personnel](#)

[Notify All](#)

▶ **Chikako Takeshita (Principal Investigator) (Certification Incomplete)**



Project Status: Update Needed Annual Disclosure Status: Not Yet Disclosed

▼ **Bryan M Wong (Co-Investigator)**



Project Status: Up To Date Annual Disclosure Status: Approved

[Details](#)

[Organization](#)

[Extended Details](#)

[Degrees](#)

[Unit Details](#)

[Person Training Details](#)

Unit Details

[Lookup/Add Multiple Lines](#) 🔍

Show 10 entries

[csv](#) [xml](#) [xls](#)

Unit Name	Unit Number	Lead Unit?	Actions
(D01342) Material Sci:Engr Pgm Dept	D01342		Delete

Showing 1 to 1 of 1 entries

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