Instructions to set up accounts for use with Microscopy Scheduling

Before your staff can schedule appointments with the Microscopy Core, an account for billing must be active in SAM (Service Center Account Management). SAM is a School of Medicine account management system which allows BAs (Business Administrators) to activate account numbers for use in the Microscopy Core and other SOMIS supported service centers. It also allows them to grant permission to individuals to make purchases against accounts on behalf of PIs (Principal Investigators). PIs can also log into SAM to request account authorization for their lab managers and staff.

BA Access to SAM

1. Log in to my.med with your PennKey: [http://my.med.upenn.edu](http://my.med.upenn.edu)
2. Look for the “Cores/Service Centers Account Management” link under the “Cores” heading in the left-hand side menu
3. If you do not see this link, please contact Julia Riches at SOMIS (richesjk@mail.med.upenn.edu 215-746-5575) and let her know your name, PennKey, and the org code(s) of the accounts you are responsible for. She will authorize your PennKey for use with SAM.
4. Once you see “Cores/Service Centers Account Management” link in your my.med menu, click it to enter SAM

Activating accounts and setting up users in SAM

Activating an account in SAM

Only BAs can activate accounts.

1. Click on the “Account Admin” tab.
2. Enter search criteria. PI name is required. It’s fine to use partial account numbers. Press the search button.
3. Select the appropriate account from your list of available accounts.
4. Click the “edit status” link.
5. Change status to “active”. Press the save button.

Your account is now active for use. Lab Members can be added at this time. See instructions below on how to add Lab Members.
Adding users to SAM - Overview

- BAs can activate Lab Managers, Lab Members, Grant Managers and Account Administrators.
- PIs can activate their Lab Managers.
- PIs and Lab Managers can request Lab Member assignments. Requests are emailed to the account BAs for approval.

Adding Lab Members to SAM

Lab Members are authorized to spend on a specific account number, and can place orders on behalf of the account's PI.

BAs can add Lab Members to accounts. PI's and Lab Manager can request Lab Member access for their staff. These requests must be approved by the account's BA.

1. Within the SAM application click on the “Account Admin” tab.
2. Enter search criteria. PI name is required (if you are a PI, then you will instead see a list of your accounts). Press the search button.
3. Select the appropriate account from the list of available accounts.
4. Near the bottom of the page, click the link for Add New Lab Member.
5. Press the pick person button.
6. Enter search criteria (typically a last name and first name are sufficient), and press the search button.
7. Select the appropriate person from the list of available individuals.
8. If more than one Lab Manager exists for the PI, select the one this person reports to. It's fine to not have a Lab Manager.
9. Press the Add button.

Adding Lab Managers to SAM

Lab Managers are authorized on all of their designated PI's accounts. They can place orders on behalf of their PI's, and can request account access for new Lab Members.

1. Within SAM click on the “User Admin” tab.
2. Enter search criteria (typically a last name and first name are sufficient), and press the search button.
3. Select the appropriate person from the list of available individuals.

4. On the right you will see links for Add Access. Choose “Add SAM Lab Manager Access.”

5. Select the appropriate Investigator and press the Add button.

Adding Grant Managers to SAM

Grant Managers are individuals authorized to approve spending on accounts within a given organizational code.

1. Grants managers can only be assigned by Senior BAs.

2. Within the SAM application click on the User Admin tab.

3. Enter search criteria (typically a last name and first name are sufficient), and press the search button.

4. Select the appropriate person from the list of available individuals.

5. On the right you will see links for Add Access. Choose Add SAM Grant Manager Access.

6. Select the appropriate organizational code and press add.

If more than 1 organizational code is required, you will need to repeat the previous two steps for each organizational code that is needed.

Adding Account Administrators to SAM

Account Administrators are individuals who are authorized to approve spending on a specific, single account

Account administrators can only be added by Senior BAs.

1. Within the SAM click on the “Account Admin” tab.

2. Enter search criteria (typically a last name and first name are sufficient), and press the search button.

3. Select the appropriate account from your list of available accounts.

4. Near the bottom of the page, click the link for Add New Account Administrator.

5. Press the pick person button.

6. Enter search criteria, i.e., name, Penn key, email, etc. and press the search button.
7. Select the appropriate person from the list of available individuals.
8. Press the Add Access button.

**BAs Approving Requests from PIs and Lab Managers**

BAs are responsible for approving Lab Member requests from PIs and Lab Managers. Lab Members cannot spend on the designated account until the request is approved by the BA.

The BAs responsible for an account will receive an email when a Lab Member request is made. If there is more than one BA responsible for an account, each will be emailed - the BAs should work out between them who will handle these requests.

1. Within SAM, click on the “Pending Requests” tab.
2. Pending requests are listed on the screen. Click the “Select” link in the right-hand column for the request you wish to review.
3. The default activation date will be the current day, but you can enter a future date if you wish. Note that the “Spending Limit” option is not currently enforced. If a Lab Manager is not already assigned for the Lab Member, select one if one is available.
4. Click either “Approve” or “Deny”

If you have questions regarding SAM please contact Julia Riches at SOMIS richesjk@mail.med.upenn.edu 215-746-5575