PROJECT MANAGEMENT TOOLS

Business Administrator Page

Choose a PI to Manage or Run an Invoice

Besides capabilities to manage each investigator's accounts individually, the BA also has access to some specialized grant management tools.

> *A few BAs have access to PIs in more than one department or division, and are able to access a different set of PIs through a pull-down tool near the top of the BA page.*

These tools are designed for the BA to query invoices in a variety of ways.

- **Run Invoices**

  A BA can run all invoices for all his/her PIs for any time frame, or for as long as the PathBioResource has been archiving data. The most common application is for a BA to print all invoices for a particular month to capture a feeder run. An email will automatically inform the BA of the feeder date and provide a link to run invoices.

  Another common application is to run all activity for a particular grant prior to closeout. If a BA is missing any documents in the grant history, he/she should contact the PathBioResource desk for help.

  Particular queries can be designed using the pulldown screens available *start-mn-yr end mn-yr*, *grant(s)* and *PI(s)*. All current grants for the department are listed in the ALL GRANTS pulldown. ALL PIs should also be listed. If a PI is missing he/she can easily be added.

  To run a specific invoice: key in the invoice number in blank box under invoice, press RUN INVOICES.

  Within a larger sort file, such as all invoices for all PIs for a month, the find feature (CTRL F) allows a BA to choose individual invoices for viewing or print. He/she can then save individual invoices as word documents.

- **Choose PI, List Projects, Remove PI, Add PI, Add Protocol**

  The BA will most often scroll down to the PI section of his/her page, choose a PI and click **LIST PROJECTS** to open the page for a particular PI. Then the BA can update projects, add or delete users, and monitor current billing activity. The BA can also view invoices for that PI under list invoices. This will list all

invoices paid via feeder run. Invoices can be viewed, saved or printed individually from this page by selecting the radio button, and clicking **VIEW SELECTED INVOICE** at the top of the page.

From the BA's main page, he/she can easily add a PI by entering a PennKey (or PennID#) and clicking **ADD PI**. To remove a PI, choose the name from the pull-down menu. Click **REMOVE PI**. This action removes the PI from your department list, but *maintains all archived invoices*.

PROTOCOL

BAs unable to add a PI, he/she should contact the PathBioResource Help Desk **215-573-0735**.