Manage PI Page

A Principal Investigator can authorize a Lab Manager and/or grants administrator to monitor his accounts and accompanying activity.

To designate a lab manager, enter the person's PennKey and other information. Press **DESIGNATE**.

When a PI logs into the PathBioResource website from Project Management, he/she is automatically linked to the appropriate Manage PI page. ***The Lab Manager, BA, or Grants Administrator selects the PI from a pull-down menu.***

Lab Manager, BA, Grants Administrator, Principal Investigator are authorized to do the following:

- **AUTHORIZE USERS:**
  Click **CHANGE ASSIGNMENTS** after each function

Add new user by entering PennKey or Penn ID (8 Digit #). Click **ASSIGN**.

Delete User. Unclick all checked boxes and press **CHANGE ASSIGNMENTS**.

Authorize researcher(s) assigned to each individual grant by clicking the project box below the PennKey(s).

Change users who are assigned to each grant by putting in or removing check marks in project boxes with a click.

When a user logs into the system to submit work, only those project(s) for which he/she is authorized will show on the screen. Users should know nicknames for their projects, or they can double-check account numbers in the **PROJECTS** section (below ADD PROJECTS).

If the screen does not show assignments as updated, click **REFRESH** button.

It is important to review the **AUTHORIZE USERS** section periodically to make certain that all project assignments are accurate. Update with new lab members, while deleting inactive users.

- **ADD PROJECTS**
  Click **AWARD** when entering a 5-ledger account. Click **BA** for non-5-ledger accounts. Only a BA may enter non-5-ledger.

For Penn researchers, most projects are grant-funded. A PI is authorized to enter grant information, but most often a Lab Manager or Grants Administrator will set up and monitor projects.

For all Grant Funded projects, type in Project Nickname, 26-digit account #, click **AWARD**. (The object code automatically populates.) If the 26-digit sequence matches Penn ERA and is active, the screen states that the entry has **PASSED**. Award information (title, number, etc.) will appear on the Manage PI screen once user returns to the Manage PI page. If any portion of the sequence is incorrect, a corresponding message will appear. For example, the 6-digit account number may not be in use with the program number, or the cref may be incorrect. The person entering the grant award needs to check with his/her BA upon receipt of such an error message.

An error message will occur if the nickname has been used before. ***The system is designed so that each nickname can be ascribed to only one fund number.***

Only a BA can enter non-grant funded/discretionary accounts. The BA may assign an end date at his discretion. For example, the account can be created for only a month or two, or for the whole fiscal year. The BA will type in Project Nickname and Account #. Click **BA.** Only the 6-digits of the account will appear, along with the end date, once the entry has cleared. The BA also has the authority to change the expiration data on a non-grant account. Click **change project activation and expiration**. Inactive, archived accounts have been moved off screen. To view them (and then put them back in archive), click **Show/Hide expired projects**.

A new project is automatically populated with the PI as user because his/her PennKey appears on the page. Other users may then be assigned. A lab researcher cannot be sent to a facility to log in using the PI's PennKey. If his/her PennKey does not appear check-marked next to the project, he will not be able to use any facility with these funds.

It is important to assign new users and/or authorize all researchers connected to the fund at the time the project is entered.

** Note: Once a project nickname is used it may not be used again. If the nickname has been used, you will be notified by error page and asked to resubmit. A variance of the nickname, i.e., NAME, NAME 2, may be assigned. This is for the purpose of grant delineation in Penn ERA.

- **DEACTIVATE PROJECTS**

A BA may deactivate any project. Only a Senior BA can reactivate.

Only a BA may deactivate a project by putting a check mark in the box next to a project and clicking on the change project expiration and activation button. Only a Senior BA may reactivate. By hovering over the deactivated grant, one can see the PennKey and Date of the person who deactivated the account. A BA may also adjust the expiration date of any non-award grant using the same procedure after entering the new expiration date in that field.

- **VIEW ACTIVE PROJECTS**

All projects, active and inactive, show under **PROJECTS.**

The active projects have a highlighted radio button. The inactive projects do not have a highlighted button and are crossed out. Inactive grants accounts remain for historical purposes and will eventually be archived. **Only active projects show** in the project section where users are assigned and authorized.

- **PENDING CHARGES**

This section lists all charges in the feeder queue prior to its monthly run.

Feeders are generally run after the 15th and before the 25th of the month. An investigator may have several invoices showing for different facilities, or for the same facility(ies) with varying account numbers. When invoices are in the PENDING queue, charges can be reviewed and shifted, if necessary. The detail for the upcoming invoice can be reviewed by clicking on the highlighted invoice number in the logged item. The invoice will provide data allowing to prescribe a change (data, user, description of charge). For example, all the line items may be correct but one, where the user should be moved to another project. If an unrecognizable item appears (i.e., either the person or the type of work is in error), call the Help Desk: **215-573-0735**.

CHANGE PROJECT USED

To move a charge from a pending charge account to a different available account, click the box next to the charge(s), click the radio button corresponding to the account to which the charge(s) should be moved, click **CHANGE PROJECT USED**. A message will appear indicating the change has been made. Go back to the page and refresh to make certain the charge(s) has been moved. These pending charges should now be listed under the newly-designated project. BA/Lab Manager/PI can only move charges to active projects. BA/Lab Manager/ PI can only move charges that have not yet run.

LIST INVOICES

Clicking this button will take you into another screen listing all archived invoices. Here you are able to view and print old invoices. If something has been billed in error, call the Help Desk, 215-573-0735.

VIEW PROTOCOLS

REQUESTS

This section (in process) shows requests in queue for the PI for all facilities. Old requests may still show because they have not been deleted by the facility director during billing.

- **Request Services: S, C, A**
  S = Stages: R V C
  - **R**: Requested
  - **V**: Received
  - **C**: Complete
- **C = Core Facility**
  - **F:** Flow
  - **G:** Molecular
  - **I:** Imaging
  - **C:** CVPF (Clinical Cell and Vaccine Production)
  - **T:** TTAB (Tumor Tissue and Biospecimen Banking)
  - **H:** Human Immunology Core
  - **M:** Microarray
- **A = Assays**
  Some facilities show quantity in this field.