

Lab Rosters in PeopleSoft

Why is there a lab roster management application separate from the Harvard Training Portal?

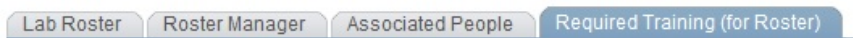
PeopleSoft Lab Roster Management feeds the Harvard Training Portal lab personnel data and auto-assigns core training requirements. While lab roster managers will be working in two systems, training assigned in PeopleSoft is accessed through the Harvard Training Portal.

<https://trainingportal.harvard.edu/>

Where is the PeopleSoft Lab Roster Management Application?

After logging in, PIs and roster managers will see lab rosters under Self Service. If you need to be added to PeopleSoft as a roster manager, please work with your PI or email ehs_training@harvard.edu

How do I navigate the PeopleSoft Roster Management Application?



For each roster you will see 4 tabs:

- Lab Roster**
 Your personnel who need mandatory trainings from the Required Training tab. Use the plus and minus buttons to add or delete people. You can add people by HUID, or click the magnifying glass to search by first and last name. Roster changes feed over to the Training Portal once daily.
- Roster Manager**
 Users who can make roster changes, edit training requirements, and add other roster managers.
- Associated People**
 When you create Lab Directors, Lab Safety Officers, and Proxies, these individuals will have roster manager access within 24 hours. Add as Non Laboratory Staff support staff or administrators who don't need lab safety training.
- Required Training**
 Required Training lets you choose from four core lab trainings: General Laboratory Safety, Laboratory Biosafety, Radioactive Materials Safety, and Commercial Laser Microscope Safety. Requirements selected in the training area will be assigned as mandatory to **every** member of your lab roster. Use the plus or minus buttons to assign or remove any of the core training requirements. Within approximately 24 hours, personnel on your roster will be able to access and complete these trainings in the Harvard Training Portal.

How do I add other Roster Managers in PeopleSoft?

PIs and roster managers can assign roster management privileges through the Associated People tab. When adding someone, you can choose from four "Types," or roles. While the type "Non Laboratory Staff" will not assign roster management privileges, choosing Lab Director, Lab Safety Office, or Proxy will. A lab can only have one director.

How do assigned trainings appear in the Harvard Training Portal?

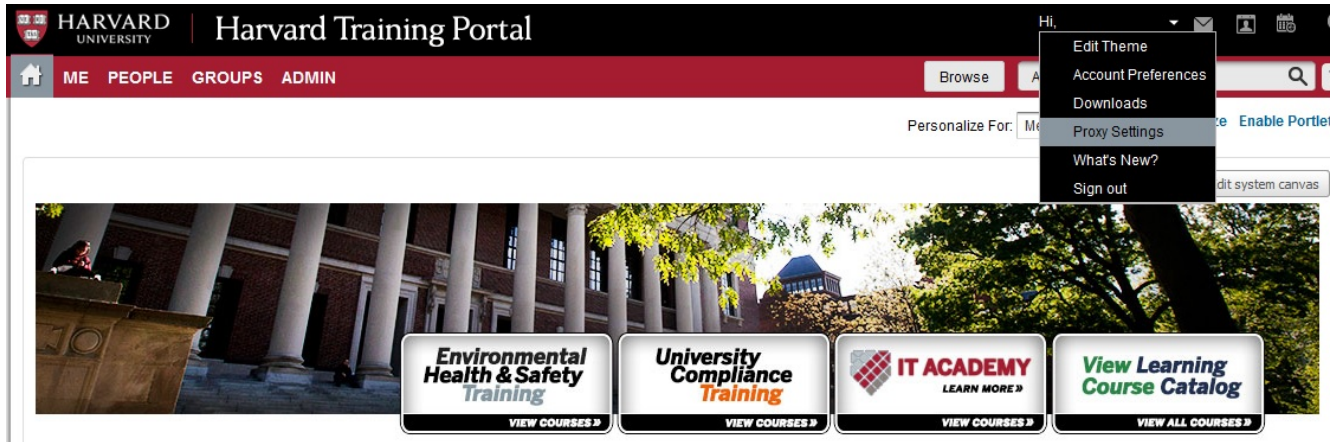
When you add required training in PeopleSoft, a daily process runs to assign the courses to everyone on your roster in the Harvard Training Portal, unless they have already completed the training. Going forward, anyone you add to the roster will be assigned the training within approximately 24 hours. The example below shows what someone on your roster would see in the Training Portal if you select General Laboratory Safety to be assigned in PeopleSoft's Required Training tab.



Adding a Proxy

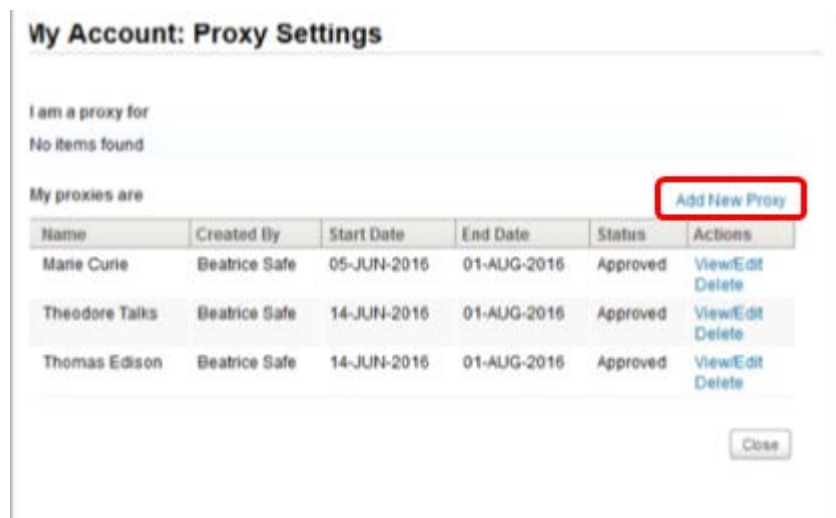
Overview: In the Harvard Training Portal, administrators and managers can designate other users to perform certain tasks on their behalf, like monitoring and assigning trainings. While acting as a proxy, you will have only the privileges assigned to you, not your own.

1. Locate your **Name** at the top right of the Home page:
 - a. In the drop down menu, select **Proxy Settings**, the **My Account: Proxy Settings** window opens.



2. In **My Account: Proxy Settings**, click **Add New Proxy**. Complete the following required fields:
 - a. **Proxy By:** Search for and select the name of the user you would like to assign as your proxy.
 - b. **Start Date:** Date the proxy access needs to start.
 - c. **End Date:** Date the proxy access needs to end (the default is set to 7 days).
 - d. Select the **roles your proxy can access**.
 - e. Click **Save**. The selected user now appears under **My proxies are**.

The selected user is immediately granted proxy authorization and will receive a system generated email notifying them of their proxy access.



Entering Proxy Mode

1. Locate your **Name** at the top right of the Home page:
 - a. In the drop down menu, select **Proxy Settings; My Account: Proxy Settings** opens.
2. In **My Account: Proxy Settings**, click **Act as Proxy**. In the **Input Reason** window, enter a short description of your reason for entering proxy mode, e.g. *monitoring training* or *assigning courses*.

My Account: Proxy Settings

I am a proxy for

Name	Created By	Start Date	End Date	Status	Actions
Beatrice Safe	Beatrice Safe	05-JUN-2016	01-AUG-2016	Approved	Act as Proxy

While in proxy mode, a floating text box displaying the name of the proxy originator reminds you that you are in proxy mode. While in proxy mode, you will only be able to perform the functions of the role(s) assigned to you.

Exiting Proxy Mode

1. Locate your **Name** at the top right of the Home page:
 - a. In the drop down menu, select **Exit Proxy mode**.
 - b. The text box with your proxy originator name will disappear and you will be relocated to the Home page.
 - c. You will be able to perform all the functions of your regularly assigned role.