

This will help Principal Investigators (PIs) and Lab Roster Managers perform the following tasks:

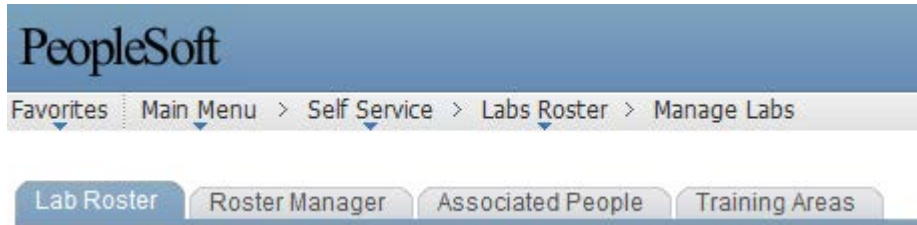
- Access PeopleSoft Lab Roster Management
- Manage Lab Rosters
- Manage Lab Training Requirements
- View and Maintain the list of Roster Managers and Personnel Associated with a Lab

Accessing PeopleSoft Lab Roster Management


1. Before accessing PeopleSoft Lab Roster Management, you must know your Harvard University ID number and have an active HarvardKey. For information on claiming your Harvard Key, visit <http://reference.iam.harvard.edu/>.
2. Only Principal Investigators and their Roster Managers can log into this portion of PeopleSoft. To log into the Lab Roster Application, visit <https://hrapps.cadm.harvard.edu/psftprd/signon.html> and log in.
3. From the **Main Menu**:
 - Select **Self Service** under the left navigation menu.
 - Locate the **Labs Roster** folder and select the **Manage Roster** link.
4. The labs are listed by PI and Department. Click on the link for the lab roster you want to manage. If you manage training for a lab and do not see the Labs Roster folder or the lab listed, please work with your PI to gain access to the system as a Roster Manager.



*Note: The **PI** for the lab is listed at the top of the Lab Roster screen. (In the Harvard Training Portal, the PI will be listed as “Alternate Manager”.)




Adding Trainees to a Lab Roster

1. Select the **Lab Roster** tab
 - Click on any plus sign “+” in the left column of the lab **Roster** to add a new row to the roster. Click on the search icon. . A pop-up window will open allowing you to search by HUID, first name, last name, or other data. Fill out one or more of the search fields and click on the **Look Up** button. Select the trainee from the search list, and they will be added to the new row in the roster. After you have added all new roster members, click on the **Save** button.

Deleting Trainees from a Lab Roster

1. Select the **Lab Roster** tab
 - Click on the minus sign “-” at the end of the row listing the person you want to remove from the lab roster. The entire row with the person information should no longer appear on the lab roster.
 - Click on the **Save** button.


*To download your roster, click on the spreadsheet icon  in the upper right corner of the Lab Roster screen. You will be given the option to save or open your roster as an Excel worksheet.

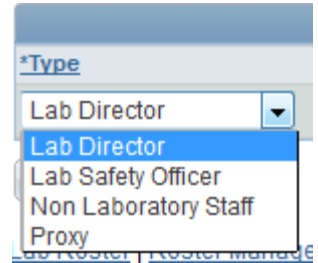
Managing Training Requirements

1. Click on the **Training Areas** tab for the selected lab roster.
 - The training area lists four core trainings mandatory for many staff members in Harvard labs.
2. Select a course from the drop down under **Training Area**.
 - To add or remove training for *the entire roster*, and click on the plus “+” or minus “-” at the end of the row. Every person listed on the **Lab Roster** (first tab) will be assigned the courses you add to the Training Area. Trainees will be able to view and manage training in the Harvard Training Portal including: launching web-based training modules, registering for instructor-led training classes, accessing training history, and printing certificates for completed trainings. Managers can assign additional trainings to roster members in the Harvard Training Portal.

Adding Associated People

There are 4 “Types” of Associated People; **Lab Director**, **Lab Safety Officer**, **Non-Laboratory Staff** and **Proxy**. Click on the **Associated People** tab.

1. Associated People are connected to the lab, but will not fall under its training requirements. Associated People data will stay in PeopleSoft and will not move over to the Harvard Training Portal. To add an associated person to the Roster Manager list, click on the “+” sign, select the appropriate **Type** from the drop down list, click on the search icon  to open the pop-up window. Enter the search information, click on the **Look Up** button, and select the person you want to add to the list.
2. If you add a person as a Lab Director, Lab Safety Officer or Proxy, they will be granted Lab Roster access. This is not immediate, but the names you enter under Associated People with these roles will show on the Roster Manager list within 24 hours.
3. **Non-Laboratory Staff** can be used for people who are associated with the lab but do not require safety training. They will not be added as Roster Managers, will not appear in the Harvard Training Portal, and are only tracked in PeopleSoft.
4. When you are done adding Associated People, click on the **Save** button.



Removing Roster Managers

1. Click on the **Associated People** tab.
 - Click on the minus sign “-” at the end of the row listing the Associated Person to be removed.
 - When you are done, click on the **Save** button.

Viewing Roster Managers

1. Click on the **Roster Manager** tab for the selected lab roster. Anyone who can manage the roster in addition to the PI will be listed here. To add other Roster Managers, follow the instructions for “Adding Associated People”.
 - The PeopleSoft security data is updated daily. Please allow 24 hours for Associated People to be added or removed from the Roster Manager tab.
 - In the Harvard Training Portal, Roster Managers will have the designation “*Authorized User*.”
 - If you cannot remove a Roster Manager, please email TrainingPortalHelp@harvard.edu