Introduction
This document will guide you through the process of managing your laboratory roster and monitoring and assigning training in the Harvard Training Portal (HTP).

- Lab Rosters in PeopleSoft
- Add a PI Proxy to Manage Training
- Enter and Exit Proxy Mode
- Monitor Team Member Training
- Register a Team Member for a Course
- IACUC-Required Courses to Assign

Lab Rosters in PeopleSoft
In order to assign courses to your lab members in the HTP, you will first need to ensure that your lab roster is up-to-date in PeopleSoft. PeopleSoft Lab Roster Management feeds into the site.

How do I access the PeopleSoft Lab Roster Management pages?
After logging into PeopleSoft, PIs and roster managers will see a lab rosters icon on the home page. If you need to be added to PeopleSoft as a roster manager, please email trainingportalhelp@harvard.edu.

How do I use the PeopleSoft Lab Roster Management Application?

For each roster you will see 4 tabs:

- **Lab Roster**
  Anyone listed on this tab should also appear in HTP under the PIs Alternate Team. Use the plus and minus buttons to add or delete personnel. You can add people by HUID or select the magnifying glass icon to search by name.

  **NOTE:** Changes made here will be fed into the HTP on a nightly basis. Added personnel will not be available to assign training in the HTP until the next day.

- **Roster Manager**
  This tab lists individuals with the Roster Manager role. To add or remove someone from this list and update corresponding permissions in HTP, contact trainingportalhelp@harvard.edu.
• **Associated People**
  View, add, or edit individuals holding the roles Lab Director, Lab Safety Officer, and Proxy (Roster Manager). You can also add non-lab support staff who do not need lab safety training.

• **Required Training**
  For IACUC purposes, PeopleSoft is only used for roster management. Environmental Health & Safety training may be available here, but IACUC course must be assigned from within HTP.

How does a POI, who needs to manage a lab roster in PeopleSoft, gain access to PeopleSoft?

The PeopleSoft **Lab Roster Manager** role can only be accessed if the POI has a user profile in PeopleSoft, which requires manual processing for non-employees. Contact your local HR department’s Authorized Requestor to request creation of a user profile in PeopleSoft, providing the POI’s name, HUID, and email address. Once the PeopleSoft security team completes the user profile in PeopleSoft, the POI can use their assigned roster manager role to add and remove people from the roster in PeopleSoft.

**Add a PI Proxy to Manage Training**

PIs and lab managers can designate other users as proxies to perform tasks on their behalf, like monitoring and assigning trainings.

To add a PI Proxy:

1. First, ask the PI to log into the HTP. **You can only assign a PI proxy from the PI’s account.**
2. Select the PI’s name in the upper-right corner of the Home Page and select **Proxy Settings** from the drop-down menu:

![Proxy Settings](image)

3. Select **Add New Proxy** and complete the following required fields:
   a. **Proxy By:** Search for and select the name of the user you are assigning as your proxy.
   b. **Start Date:** Date the proxy access will start.
   c. **End Date:** Date the proxy access will end (the default is set to 7 days).
4. Select **Team Dashboard**, then select **Save**.
Enter and Exit Proxy Mode

To enter Proxy Mode:
1. Select your name in the upper-right corner of the Home Page and select **Proxy Settings** from the drop-down menu.
2. Find the PI for whom you want to act as a proxy and select **Act as Proxy** in the “Actions” column.
3. A window will appear asking you to briefly describe your reason for entering proxy mode (e.g. “monitoring training” or “assigning courses”).
4. A floating text box will display the name of the proxy originator to remind you that you are in proxy mode. You will only be able to perform the functions of the role(s) assigned to you.

To exit Proxy Mode:
1. Select your name in the upper-right corner of the Home Page and select **Exit Proxy Mode** from the drop-down menu.
2. You will be returned to your Home Page and will be able to perform all of the functions of your regularly assigned role.

Monitor Lab Roster Member’s Training
1. On the Main Menu, select **My Team** to view a list of your team members or lab members (listed under Alternate Team) and see an overview of their training status.
2. Switch to the **Alternate Team** to view or assign learning to the PI’s Lab Roster.
3. On the “Overview” tab, select the name of the lab member whose training plan you want to view.

![Image of the overview tab with a selected person's learning plan]

4. The selected person’s **Learning Plan** page automatically displays all courses currently in progress and assigned to the individual. You can also use the filters to view completed courses and review expiration dates.

![Image of the learning plan page with courses listed]
Register a Lab Roster Member for a Course


   ![Assign Learning](image)

   **IMPORTANT**

   Due to their sensitive nature, access to these courses is restricted. Users must be registered for “Working with the IACUC (FAS and HMS)” first before they can be registered for any other animal-related course.

   You will need to complete the registration process for “Working with the IACUC (FAS and HMS)”, and then follow the registration steps again to register users for additional courses. Failure to do so will result in an error and unsuccessful registration.

   **Step 1: Select Learning**

   2. When the Assign Learning window appears, select Register.

   ![Register](image)
3. Under “Select Learning Item” search for the course you want to assign. 
   **Tip:** Search for “IACUC” or “Working with the IACUC (FAS and HMS)” in the “Search Catalog” field to show all IACUC-related courses, or just enter the course name you want to assign surrounded by quotation marks (e.g. “ ”).

![Select Learning Item]

4. Select the **Plus** symbol (➕) to the right of the course you wish to assign.
5. Repeat steps 2 and 3 to add multiple classes at once.

### Step 2: Select People

6. Scroll down to the Add Person section and search using the name or HUID of the person you wish to assign to the training course(s). Select the **Plus** symbol (➕) button for each person you wish to assign the course.

7. **Optional:** To indicate the assigned course is required, select **Yes** in the “Mandatory” column.

![Add Person]

### Step 3: Review Selections

8. Review your selections and click **Register** in the lower right. A confirmation message appears, indicating that the team member has been successfully registered. Enrolled users will receive a notification confirming registration with a link to the training module.
IACUC-Required Courses to Assign

**Working with the IACUC**

**REMINDER:** All animal users must first be registered for “Working with the IACUC (FAS and HMS)” before they can register other IACUC-related courses. You must complete the registration process for “Working with the IACUC (FAS and HMS)”, then return to Step 1 and in order to assign all other courses.

### Other Courses

<table>
<thead>
<tr>
<th>Applicable User</th>
<th>HTP Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>All animal users</td>
<td>• Working with the IACUC (FAS and HMS)</td>
</tr>
<tr>
<td>Mammal or bird users</td>
<td>• Working with BL2-N Infectious Agents in Animals (HMS)</td>
</tr>
<tr>
<td></td>
<td>• Safe Use of Toxic and Hazardous Materials in Animals (HMS)</td>
</tr>
<tr>
<td>Rodent users</td>
<td>• HCCM Cage Based Rodent Records and Necessary Forms (HMS)</td>
</tr>
<tr>
<td></td>
<td>• HCCM Facility Orientation Primer (HMS)</td>
</tr>
<tr>
<td></td>
<td>(Must be completed before scheduling HCCM facility orientation)</td>
</tr>
<tr>
<td></td>
<td>• HCCM Rodent Handling (HMS)</td>
</tr>
<tr>
<td></td>
<td>(Required for users &lt; 3 months experience with animals; complete once)</td>
</tr>
<tr>
<td></td>
<td>• Rodent Euthanasia and Compassion Fatigue (HMS)</td>
</tr>
<tr>
<td>Users performing survival surgery on rodents</td>
<td>• HCCM Rodent Surgery (Blended - HMS)</td>
</tr>
<tr>
<td></td>
<td>(WBT followed by an instructor-led session)</td>
</tr>
<tr>
<td>Users working with [USDA-covered species](e.g. hamsters, non-human primates, rabbits, etc.)</td>
<td>• USDA Medical Records (Blended- HMS)</td>
</tr>
<tr>
<td></td>
<td>(WBT followed by an instructor-led session)</td>
</tr>
<tr>
<td></td>
<td>• AWA Emergency Plan (HMS)</td>
</tr>
<tr>
<td></td>
<td>(While most other courses can be completed triennially, the USDA requires this course to be completed every year)</td>
</tr>
<tr>
<td>Non-human primate users</td>
<td>• Working Safely with Non-Human Primates (HMS)</td>
</tr>
<tr>
<td>Aquatic users</td>
<td>• Introduction to Zebrafish (HMS)</td>
</tr>
<tr>
<td></td>
<td>(Required for fish users)</td>
</tr>
<tr>
<td></td>
<td>• Working with the Laboratory Xenopus (HMS)</td>
</tr>
<tr>
<td></td>
<td>(Required for Xenopus users)</td>
</tr>
</tbody>
</table>

### Refresher Training

Unless specified, training must be renewed every three years. HTP will automatically enroll users to the applicable refresher courses and notify them of upcoming expirations to help avoid lapses in training.