

## Introduction

Laboratory animal training must now be completed in the Harvard Training Portal (HTP). This document will guide you through the process of managing your laboratory roster and monitoring and assigning training in the HTP.

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## Lab Rosters in PeopleSoft

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

### 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](mailto: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 the HTP. They will appear under the PIs Alternate Team in HTP. Use the plus and minus buttons to add or delete personnel. You can add people by HUID or click on the magnifying glass icon to search by name.

**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 the HTP, contact [trainingportalhelp@harvard.edu](mailto: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**  
 Environmental Health and Safety trainings may be available here. IACUC courses, however, may only be assigned from within the HTP.

**For the purpose of assigning IACUC courses, PeopleSoft is only used for roster management.**

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

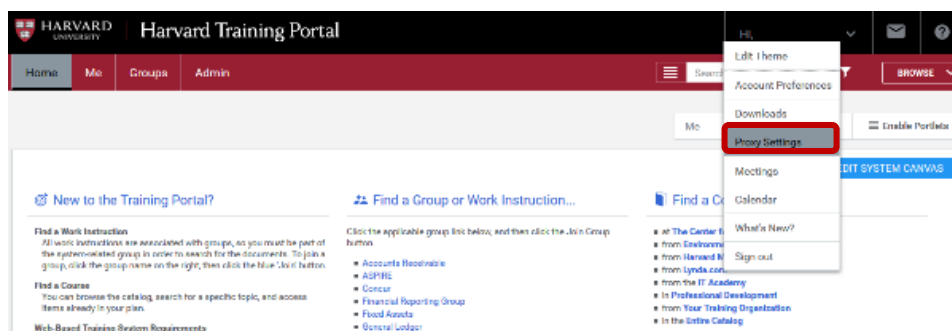
The PeopleSoft **Lab Roster Manager** role can only be accessed if the POI has a user profile in PeopleSoft, which requires manual processing for non-employees. Contact your local HR department’s Authorized Requestor to request creation of a user profile in PeopleSoft, providing the POI’s name, HUID, 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:

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



- Click **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 click **Save**.

## Enter and Exit Proxy Mode

### To enter Proxy Mode:

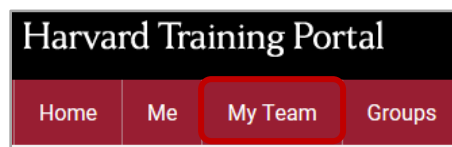
1. Click on your name in the upper-right corner of the Home Page and select **Proxy Settings** from the drop-down menu.
2. Find the PI for whom you want to act as a proxy and click **Act as Proxy** in the “Actions” column.
3. A window will appear asking you to briefly describe your reason for entering 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:

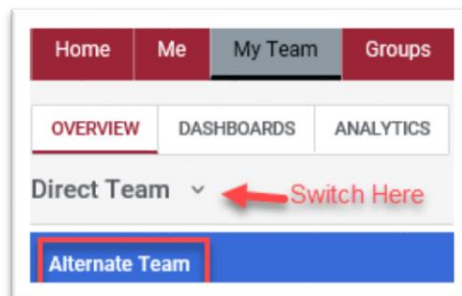
1. Click on your name in the upper-right corner of the Home Page and select **Exit Proxy Mode** from the drop-down menu.
2. You will be returned to your Home Page and will be able to perform all of the functions of your regularly assigned role.

## Monitor Lab Roster Member’s Training

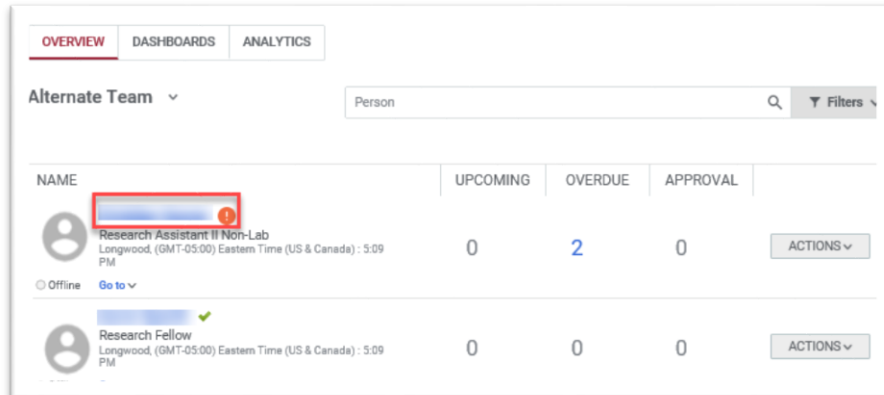
1. On the Main Menu, click **My Team** to view a list of your team members or lab members (listed under Alternate Team) and see an overview of their training status.



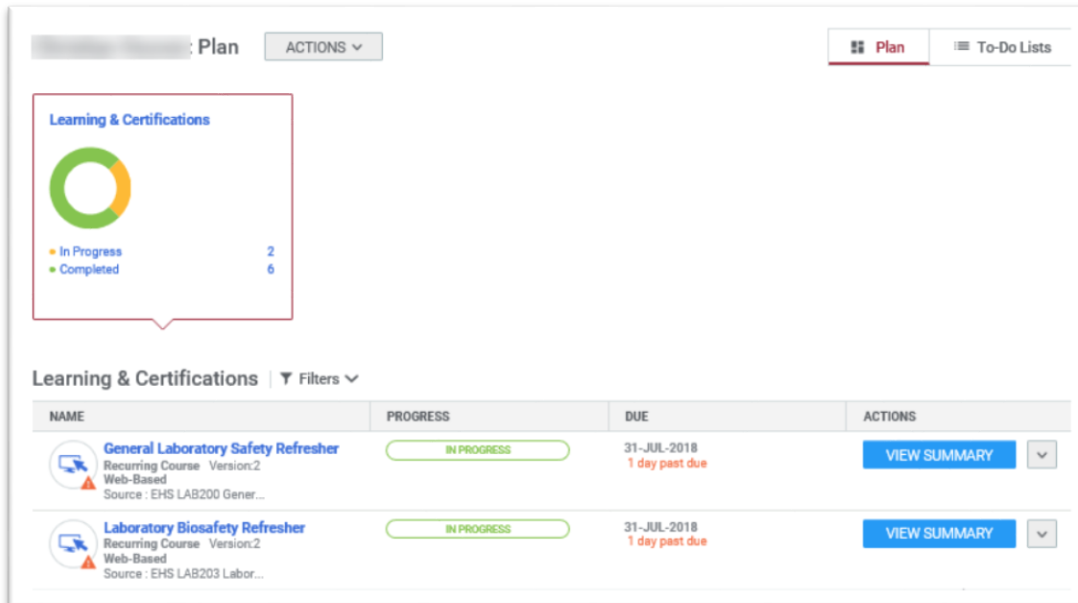
2. Switch to the **Alternate Team** to view or assign learning to the PI’s Lab Roster.



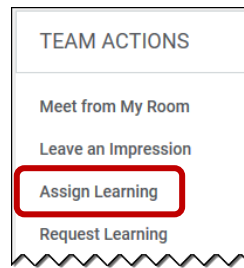
- On the “Overview” tab, click the name of the lab member whose training plan you want to view.



- 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.



## Register a Lab Roster Member for a Course



### IMPORTANT

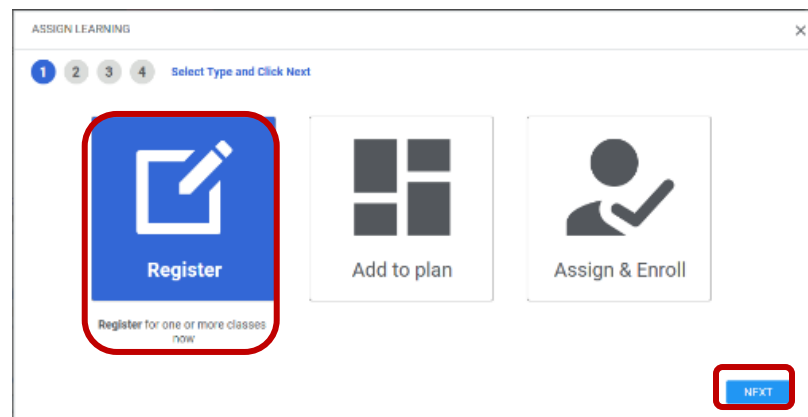
Due to their sensitive nature, access to these courses is restricted. Users must be registered for “Working with the IACUC” before they can be registered for any other animal-related course.

You will need to complete the registration process for “Working with the IACUC,” 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.

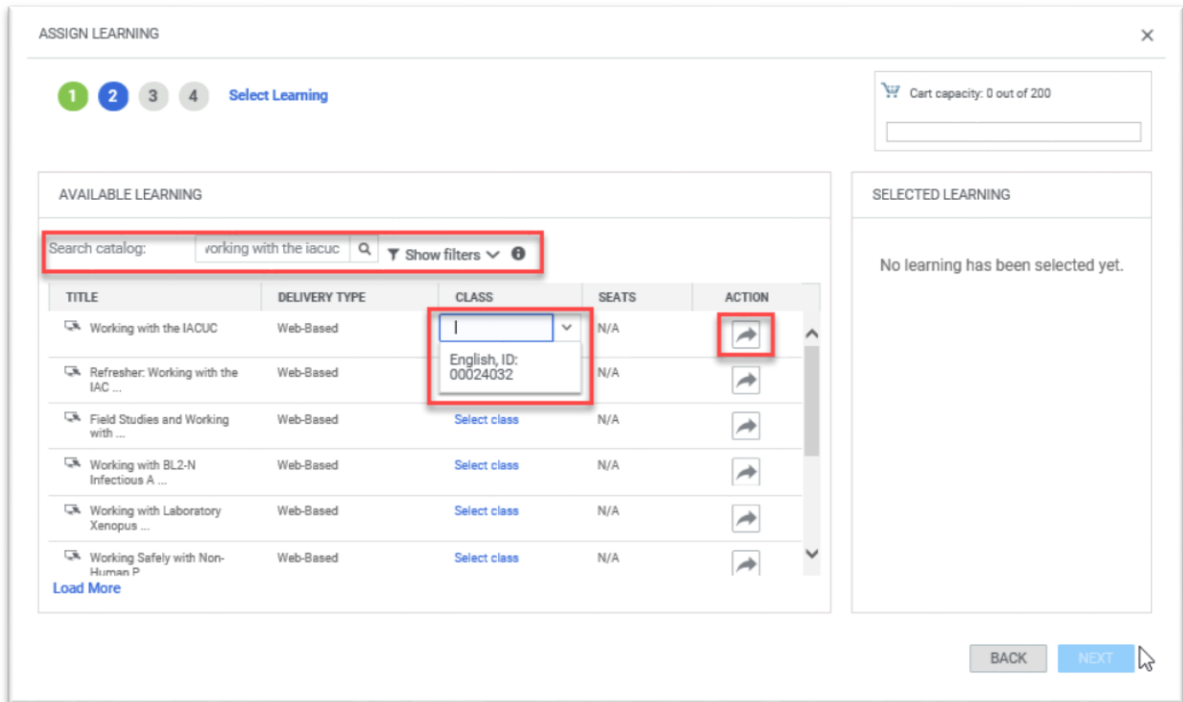
1. On the “Team Overview” tab, under “Team Actions,” click **Assign Learning**.

#### Step 1: Select Learning

1. When the Assign Learning window appears, click **Register**, and then **Next**.



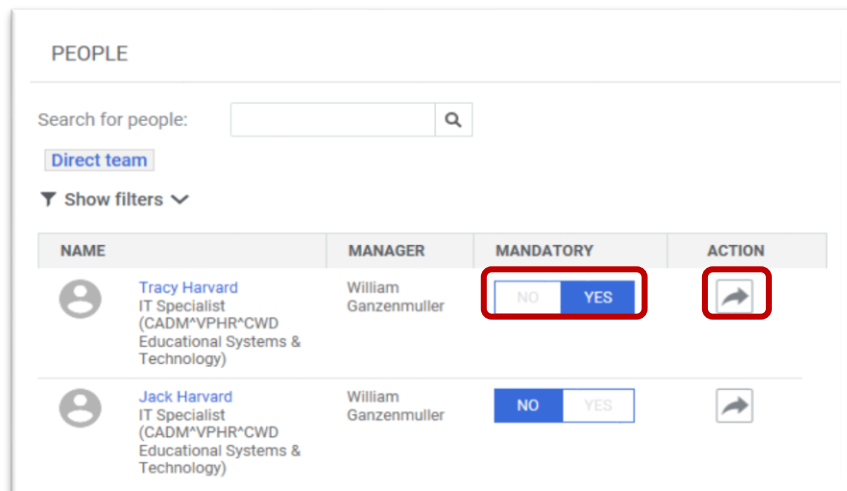
2. Under “Available Learning” search for the course you want to assign.  
**Tip:** Search for “IACUC” or “Working with the IACUC” in the “Search Catalog” field to show all IACUC-related courses, or just enter the course name you want to assign surrounded by quotation marks (“”).



3. Click **Select Class** to choose the desired class section. Web-based trainings will only have one option.
4. Click the **Action** button (↗) to add the course to the “Selected Learning” list on the right side of the page.
5. Click **Next**. The “Select People” screen appears.

## Step 2: Select People

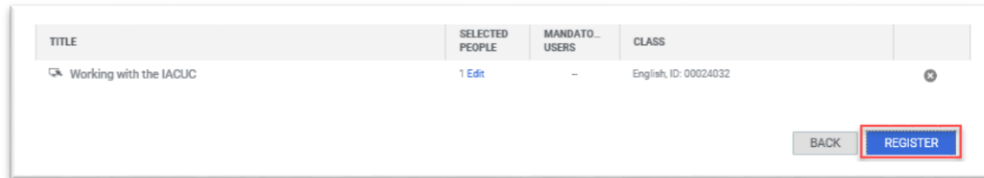
1. Click the **Action** (↗) button for each person you wish to assign the course.
2. **Optional:** To indicate the assigned course is required, click **Yes** in the “Mandatory” column.



3. Click **Next**. The “Review Selections” screen appears.

### Step 3: Review Selections

4. Click **Register**. 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.



## Courses to Assign

### Working with the IACUC

All animal users must first be registered for “Working with the IACUC” before they can be registered for any other courses.

**You must complete the registration process for “Working with the IACUC,” then return to Step 1 and begin again to assign additional courses.**

### Other Courses

Applicable User	HTP Course
<b>Mammal or bird users</b>	<ul style="list-style-type: none"> <li>Working with BL2-N Infectious Agents in Animals (HMS)</li> <li>Safe Use of Toxic and Hazardous Materials in Animals (HMS)</li> </ul>
<b>Rodent users (Required for access to animal facilities)</b>	<ul style="list-style-type: none"> <li>HCCM Cage Based Rodent Records and Necessary Forms</li> </ul>
<b>Users performing survival surgery on rodents</b>	<ul style="list-style-type: none"> <li>Survival Rodent Surgery (ILT- HMS) <i>(Instructor-led; register to schedule)</i></li> </ul>
<b>Users working with USDA-covered species</b>	<ul style="list-style-type: none"> <li>USDA Medical Records (ILT- HMS) <i>(Instructor-led; register to schedule)</i></li> </ul>
<b>Non-human primate users</b>	<ul style="list-style-type: none"> <li>Working Safely with Non-Human Primates</li> </ul>
<b>Aquatic users</b>	<ul style="list-style-type: none"> <li>Introduction to Zebrafish (HMS) <i>(Required for fish users)</i></li> <li>Working with the Laboratory Xenopus (HMS) <i>(Required for Xenopus users)</i></li> </ul>

### Triennial Refresher Training

All required training must be renewed every three years. The Harvard Training Portal will automatically enroll users who have completed initial training modules in the three-year refresher courses.

Users will be notified of upcoming expirations to help avoid lapses in training.

Triennial refresher training for “Survival Rodent Surgery” and “USDA Medical Records” is online and does not need to be scheduled with HCCM.