

# Adding Principal Investigator Departments into iLab

## Standard Operating Procedure 302 for Pitt iLab System

iLab Role: Institution Administrator

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### Purpose:

It is useful to have a consistent naming convention for associating principal investigators (PIs) and their labs with departments that are stored in iLab. This information is useful when developing standardized annual reports and highlighting which schools and departments are using specific shared research cores. Schools and department names appear on websites and in CVs and are easiest for human interpretation, but are subject to change, whereas department numbers are assigned and remain consistent across name changes. Thus, it is useful to have access to standardized names of schools, departments, and the persistent number that is associated with them.

### Scope:

This SOP should only be performed by an institution administrator. While iLab's system permits individual PIs to change their affiliations, they are expressly encouraged not to do so that reports will be correct and complete. Faculty not associated with Hillman may add secondary department fields if desired.

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## **Challenges:**

There are several challenges to developing standardized department labels for reporting.

At the University of Pittsburgh, department names as recorded in our financial management system are not standardized. Some include the name of the school that they are a part of, and some do not. Some abbreviate the name of the school that they are in, and some use the full name. In some cases, departments include different abbreviations for their schools. Finally, at least one department uses an abbreviation for a school name that has changed.

Additional problems occur for faculty that take on administrative or some special roles. Deans and Associate or Assistant Deans are often assigned to a “dean” primary department, but facilities charges should be associated with their home research-related department. Similarly, “Mellon Professors” need to be associated with their home research-related department. The Hillman Cancer Center has several faculty that are primarily associated with them, and thus these faculty need to be appropriately marked. Some others use Hillman’s facilities, so it is helpful to mark them as a member of Hillman as a secondary department.

Agilent’s iLab system has some limitations too. Ideally there would be a mechanism to encode the school separate from the department. There is no support for this; however, there is support for a PI to be a member of a primary and secondary department. There are limitations of this encoding – only the primary department is used when producing automated plots or for assigning membership into a group that can be managed by department-level administrators.

This SOP defines standards so that charges can be accurately reported and problems can be addressed by administrators with varying degrees of responsibility and includes several workarounds.

## **Standard Encoding**

The school name, department name, and department number should be included in the primary department field of iLab for all departments except the Hillman Cancer Center. Faculty not associated with Hillman may add secondary department fields if desired.

Format: [School Abbreviation] | [Department name] | [Department Number]

The vertical bar will serve as the delimiter between the three fields, so it cannot be used as part of the field.

The following abbreviations should be used for schools:

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School or Campus Name	Abbreviation
Bradford	UPB
Education	EDU
Greensburg	UPG
Johnstown	UPJ
Katz Graduate School of Business	KGSB
Kennith P. Deitrich School of Arts and Sciences	DSAS
Libraries	LIB
Social Work	SW
School of Computing and Information Sciences	SCI
School of Dental Medicine	DENT
School of Health and Rehabilitation Sciences	SHRS
School of Medicine	MED
School of Nursing	NUR
School of Pharmacy	PHARM
School of Public Health	SPH
SVC Health Sciences	HS
SVC and Provost	PRO
Swanson School of Engineering	SSoE
Titusville	UPT

Some departments include similar encodings as part of their names. Some others use abbreviations of schools that have changed their names – one example is “GSPH-Human Genetics”, even though the School of Public Health removed the “Graduate” prefix years ago. Finally, some distinguished faculty need to be individually looked up and assigned to their primary department.

Refer to the first spreadsheet in the excel titled “Faculty by HR RC & HR Dept” for assigned department names and numbers. This file also contains macros that automate the proper format. A yearly updated file should be obtained from Pitt’s Cost Accounting.

Example department name with proper formatting: MED|Pathology|35206 (School of Medicine, Pathology Department # 35206).

Every fall we will reset the department information. The following instructions explain the process of updating this information:

## **Instructions for updating the Primary and Secondary Department Information**

1. First, use the “1. Primary Department” tab, match the names with those in iLab, and apply the “Primary Department” column to the faculty names.

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2. Then, use the “2. Corrections – Individuals” tab to overwrite the “Primary Department”. These reassign faculty who are in administrative positions back to their primary departments, which is where they would charge facilities access from.
3. Then, use the “3. Corrections – Hillmans” tab.
  - i. If the “Primary Department” column is filled in, then
    1. Move the existing “Primary Department” material to iLab’s Secondary Department.
    2. Then replace the “Primary Department” material with the contents of the column.
  - ii. If the “Secondary Department” column is filled in, then overwrite iLab’s Secondary Department material with the contents of the column.
  - iii. These corrections ensure that Hillman iLab support people can help faculty/staff ensure their grants are properly charged.

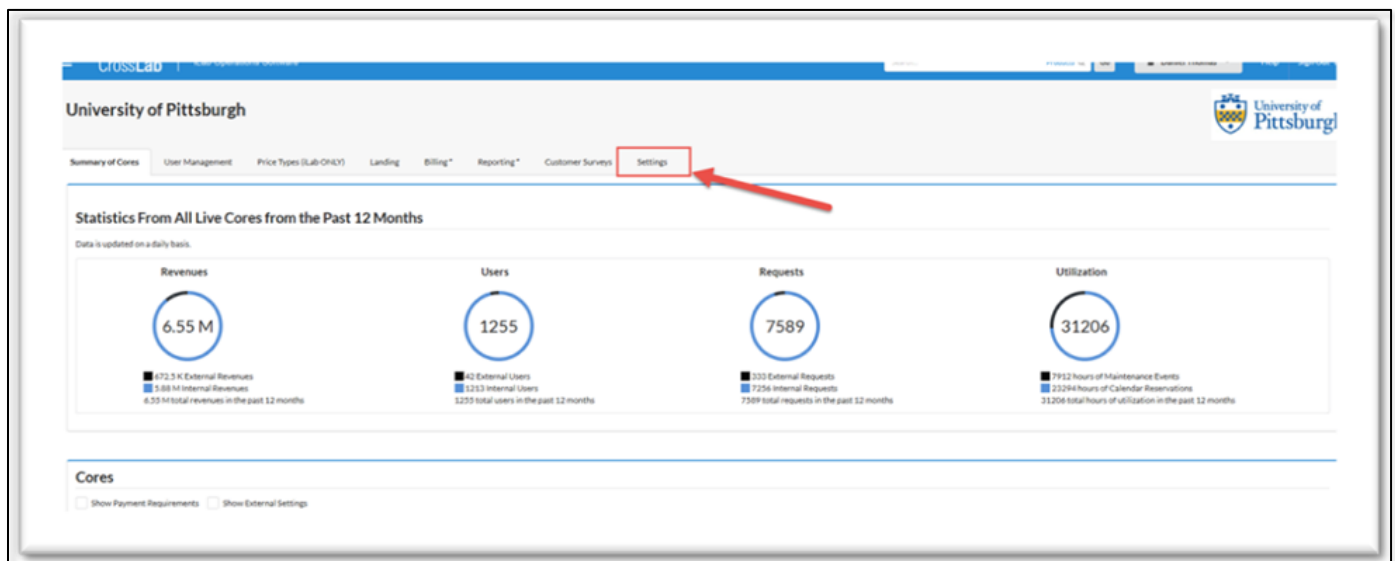
## Cadence

To address the challenges listed above and to ensure that faculty are using the proposed standard encoding, the iLab system needs to be periodically updated and/or corrected. This is a manual process, and since faculty could edit and change their own departments, they may need to be periodically corrected.

## Update Process

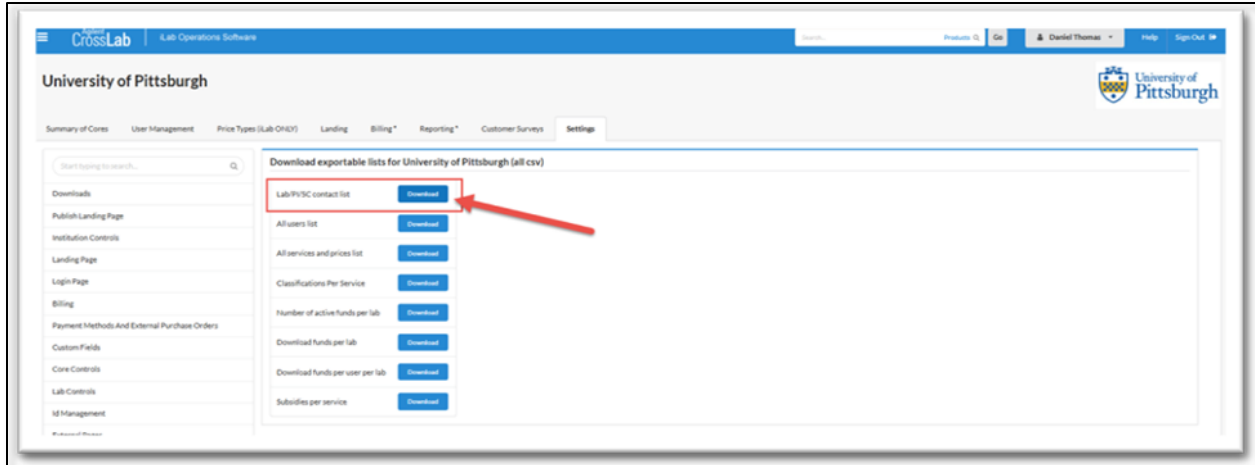
### Extracting PI/Lab List with Departments

1. Click on ‘University of Pittsburgh’ in the left side navigation menu under ‘Manage Groups’.
2. Select the ‘Settings’ tab on the institution dashboard.

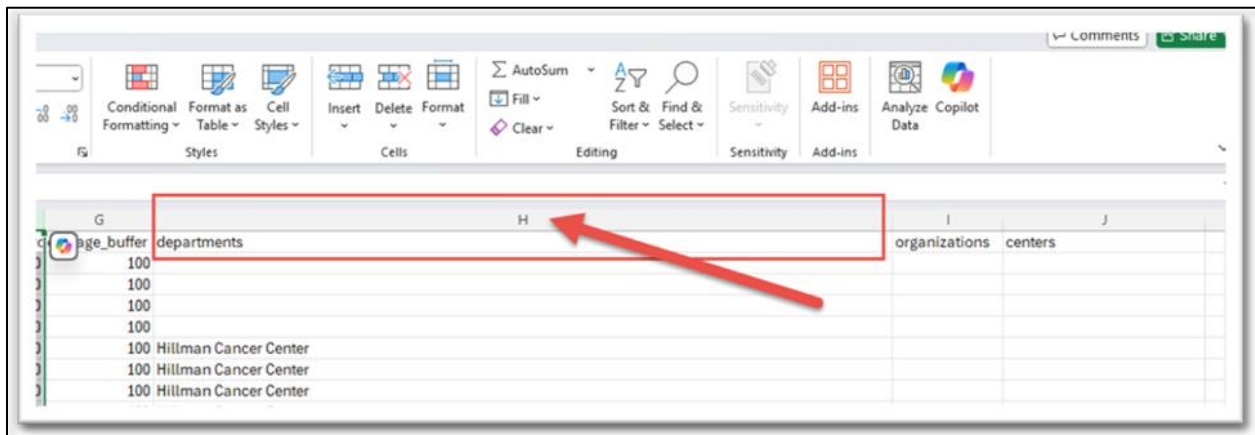


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- From the list of downloads select the Lab/PI/SC Contact list and click on download.  
\*Note: This is a large file and may take a few minutes to download.
  - Use the data in this file to identify any Incorrectly named or formatted departments or any PI's located in incorrect departments.



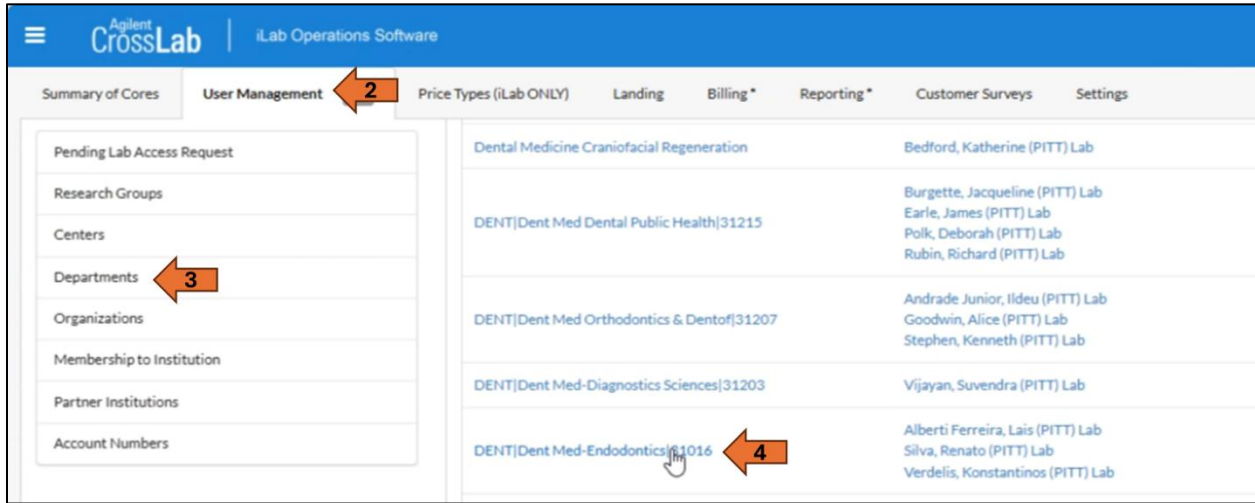
- Column H in the downloaded .csv will indicate the department information listed in iLab. \*Note: Users who manage service centers and labs, or multiple labs will be listed more than once.



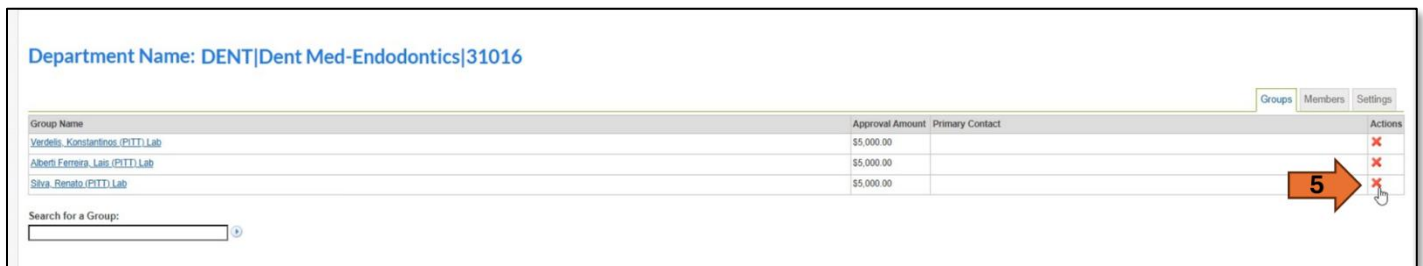
## Removing a Lab/PI from a Department

- Navigate to the institution landing page.
- Click on the 'User Management Tab'.
- Click on Departments from the left-hand menu.
- Find and click on the Department name.

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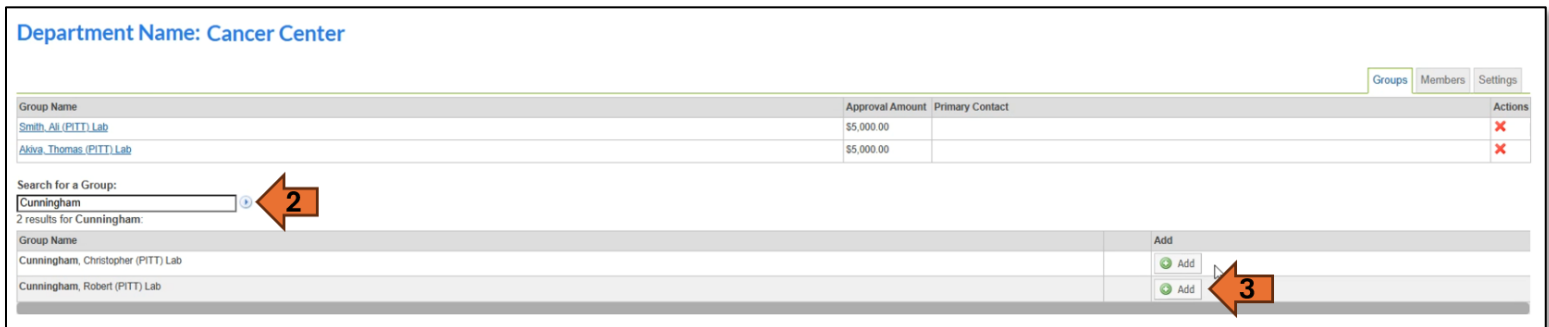


5. On the 'Groups' tab, find the Lab/Group/PI to remove and click the red 'x' under 'Actions'.



## Adding a PI/Lab/Group to a Department

1. Follow steps 1-4 as outlined in the [section above](#).
2. On the 'Groups' tab, scroll to the bottom of the page and search for the PI/Lab/Group to add to the Department.
3. Click the green plus sign to the right of the correct PI/Lab to add them to the Department.



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