

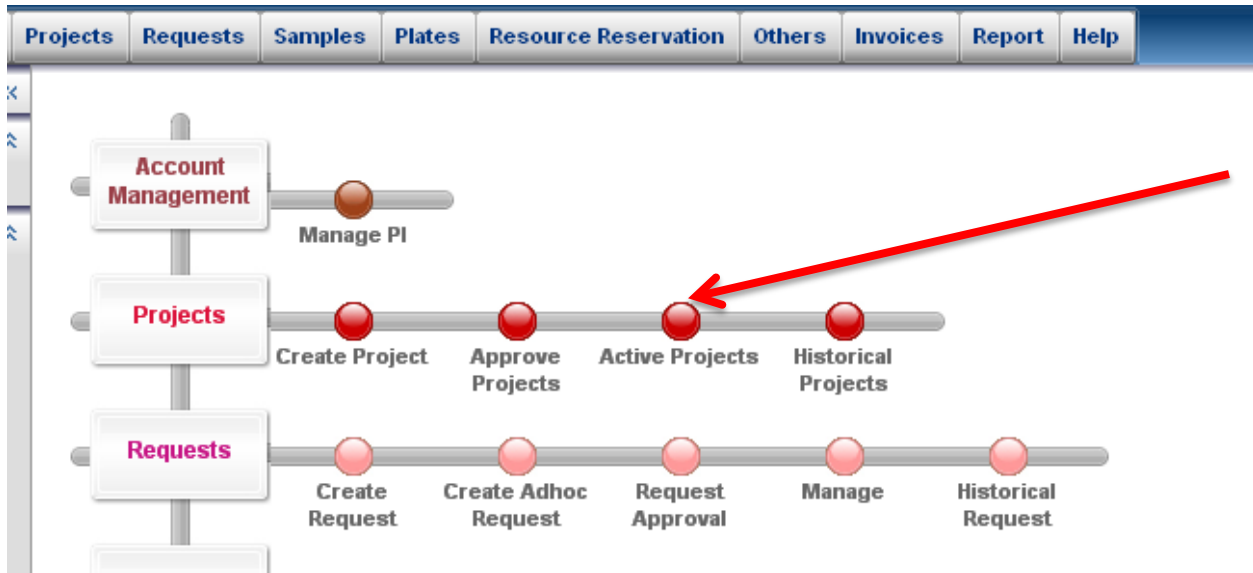
Edit Projects

Important Note: Incorrect chartfields will continue to be invoiced unless you edit the associated project:

1. **First, edit the invoice.**
2. **Second, edit the project to prevent future incorrect invoices.**

Editing projects can be done from the Projects tramline under LIMS site map.

1. To edit active projects, click on “Active Projects”.



- When brought to the Active Projects list page, click on the “Project by PI” search query, as demonstrated below.

1) Click “Project by PI” query

2) Click on the magnifying glass icon, and a new window will pop-up

3) Type part of PI Name in the search box, hit return, and then click hyper linked name

4) Click “OK”

- Edit the project by checking the desired project, and clicking on the “Edit” button.
- The Project Details page will appear (below).

Click the “Billing Info” tab to access Chartfield information

Other lab members can be added to project, by clicking on the “Members” tab

5. To change the chartfield (or replace an old chartfield) from the “Billing Info” tab, click on the magnifying glass icon next to the chartfield text box, select the chartfield, and then click on the “Save” button, as demonstrated below.

The screenshot shows the 'Edit Project PR-00369' form in the 'Billing Info' tab. The form is divided into several sections:

- Life Cycle:** 1. Initial/Cancelled, 2. Consultation/ReConsultation, 3. Approved (Next: Submit Request), 4. Closed.
- Payment Option:** Chartfield (dropdown menu).
- Other Account:** Grant Number (text box).
- Grant PBO:** Grant Sponsor (text box).
- Grant Start Date:** Grant End Date (text box).
- Budgeted Amount:** Tentative Project Consumed Amount (text box).
- Quoted Amount:** Membership (text box, value: NYU).
- Check for Fund:** Yes (radio button), No (radio button).
- Financial Department/Division Administrator Contact Information:** KID (text box, value: LULJF01), Name (text box, value: Frances P Bordon), Email (text box, value: Frances.Bordon@nyumc.org), Phone (text box, value: 212/263-2510).
- Milestones (0):** Members (4), Quotations(0), Attachments.

Red arrows indicate the steps to change the chartfield: 1) Click the magnifying glass icon next to the chartfield text box. 2) Choose the correct chartfield. 3) Click the 'Save' button.

- 1) In “Billing Info” tab, click icon next to chartfield.
- 2) Choose correct chartfield
- 3) Click “Save”