PI Financial Tool – Gen 2
Quick Reference – Group Function

Objectives:
Through using this quick reference guide, a PI Financial tool user will be able to:
1. Create a group of related projects
2. Edit an existing group of projects
3. Delete an existing group of projects

Group – what does it do?
*Group* allows you to create a subset of related projects.

Group – why would I use it?
*Group* can help you organize related projects, making it easier to manage a subset of your sponsored projects. For example, you may want to group all of the projects that are being done by one of your labs, or group projects by sponsor. The active group selected will apply to the personnel and the scenario screens. The organizing strategy is up to you.

Group – how is it done?

To create a Group of projects
From the home page ...
- Click Add New Group
In the new window ...
- Enter a name for the group
- Click “Create Group”

From the new window – list of projects ...
- Click the box to select projects to be included in the group
- A scroll bar may appear on the right side for larger project lists
- Click “Add Selected Projects”
Your newly created group appears on its own group page!

To edit a group
From the home page ...
- Select the group you want to edit from the group menu
- Click “Edit Group”

To revise the order that projects are listed ...
- Use the green arrows to move a project up or down on the list
- Another options to change the sort is to modify the order number
To remove a project from the list...
- Click on the red X to remove a project from the list

**Warning!**
You cannot “undo” remove project
If you remove a project in error will need to use the “Add Project” feature to correct the mistake.

To add a project to the group
- Click “Add Projects”

From the new window – list of projects...
- Click the box to select projects to be added to the group
- Click “Add Selected Projects”
The revised group project list appears

To delete a group
From the group page ...

- Click delete group
- You will return to the home page
- The group will be removed from the group list menu
Warning!

You cannot “undo” Delete Group
If you delete a group in error will need to use the “Add New Group” feature to recreate the group.