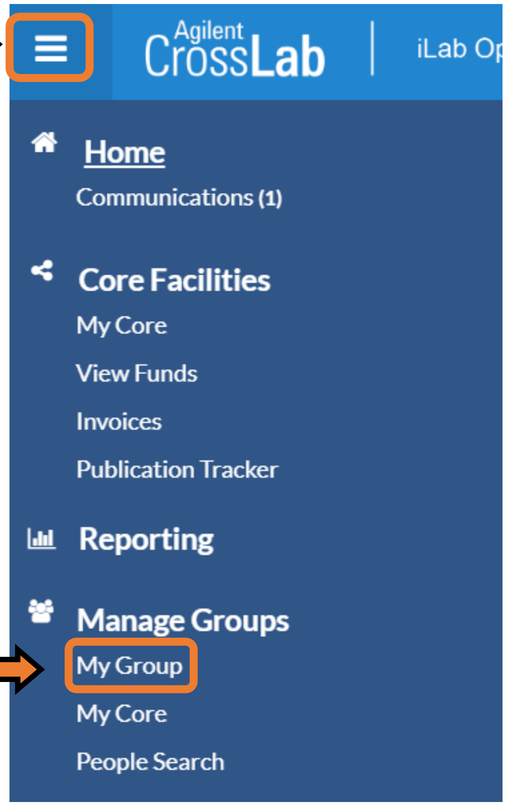
CASE WESTERN RESERVE
UNIVERSITY

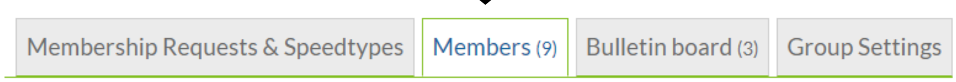
**Subject and Task:** Manage invoice recipients

**1.)** After logging in, select the hamburger symbol in the top left corner.



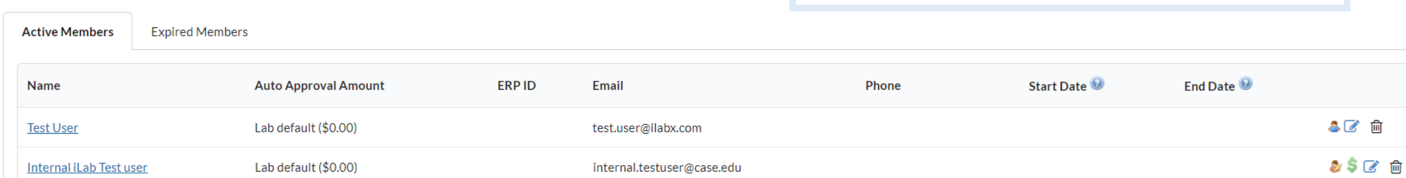

**2.)** Hover over "My Group" and select your lab from the list.

**3.)** Select Members




**4.)** View Lab Members

**Note:** Principal Investigator and Managers have access to modify the Group, Members do *not*.



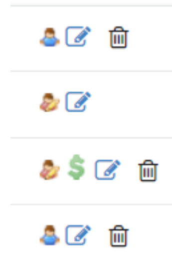
**Note:** The Principal Investigator and Financial Managers listed are the recipients of monthly invoices from CWRU. There should be a *minimum* of 1 Principal Investigator and 1 Financial Manager per Lab.

Principal Investigator

Manager

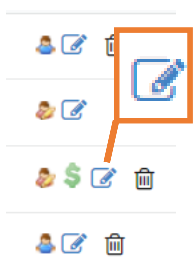
Financial Manager

Member



## **How to:** Create a Financial Manager

**1.)** Select Edit Member



**2.)** Permission = manager

**3.)** Check Core Financial Contact