

PI Actions in iLab:

See screen shots below

- 1) Accepting users into your lab
- 2) Assigning SubLedgers to lab members

iLab Solutions
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(UTSW) Lab

Membership Requests & SubLedgers | Members (5) | Budgets | Protocols | Bulletin board (0) | Group Settings

Membership Requests

⚠ An Access Request requires approval

Date	Name	Email	Actions
Jan 08 '16	Accept Reject

1. Membership Requests: Accept/Reject lab membership requests. Registered users can also be added directly on the Members tab.

Manage SubLedgers

🔔 Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

Name	Default SubLedger
...	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
...	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. SubLedger Assignments: Check the boxes in the grid to provide SubLedger access to lab members

Access your lab page from here.

PI Actions in iLab cont:

- 3) Requesting access to additional SubLedgers
- 4) Hide/Show SubLedgers from view/access

Request access to additional SubLedgers

If you don't see a SubLedger that you should have access to, please type it in below. The SubLedger Approver will receive a notification and approve or deny your request.

★ SubLedger

3. Additional SubLedger Access:
Request access to additional (non-sponsored) SubLedgers

Your SubLedger requests:

SubLedger	Requested on	Status	Owned by	Resolved on	Resolved by	Notes by SubLedger Approver	Archive request
000000000000	Dec 11 '15	approved	000000000000	Dec 11 '15	000000000000		
000000000001	Dec 11 '15	approved	000000000000	Dec 11 '15	000000000000		
000000000002	Dec 11 '15	approved	000000000000	Dec 11 '15	000000000000		

Disable/Enable SubLedgers

The list of these SubLedgers are received automatically from your institution's financial system. If you have any SubLedgers that are not used, please uncheck those below. Selected ones are displayed and usable in the grid above by your researchers.

Please note, when you uncheck a specific SubLedger, users will NOT be able to use it and any active charges that have not been billed will be considered invalid. If you think a SubLedger should not be in your lab permanently, please contact your institution administration.

[select all](#) | [select none](#)

4. Disable/Enable SubLedgers:
Hide/Show SubLedgers on the fund grid

000000000000 000000000001 000000000002 000000000003 000000000004 000000000005 000000000006 000000000007 000000000008 000000000009 000000000010

PI Actions in iLab cont:

- 5) Managing lab members and their rights
- 6) Managing lab members and their rights
- 7) Managing lab members and their rights

(UTSW) Lab

1 Membership Requests & SubLedgers
Members (5)
Budgets
Protocols
Bulletin board (0)
Group Settings

Lab-wide approval settings

Click the pencil icon next to the person below whom you would like to make the financial approver.

Default auto-approval threshold

Cost overage buffer

5. Set Approval Thresholds:
Set the amount above which new requests require financial approval from authorized lab personnel. This defaults at the lab-level, or can be set at the member-level.

6. Manage Lab Members:
Use "x" to remove a member from the lab. Use the pencil icon to edit membership levels of the lab members. A "Manager" can provide financial approval on requests. All members who should receive approval emails need to be listed as a "financial contact."

Lab members and settings

Name	Auto Approval Amount	Email	Phone	Start Date	End Date	
John Doe	Lab default (\$500.00)	john.doe@utsouthwestern.edu				👤 💰 ✎
Jane Smith	Lab default (\$500.00)	jane.smith@utsouthwestern.edu	214-646-1234			👤 ✎ ✕
John Doe	Lab default (\$500.00)	john.doe@utsouthwestern.edu	9876			👤 ✎ ✕
Jane Smith	Lab default (\$500.00)	jane.smith@utsouthwestern.edu	214-646-1234			👤 ✎ ✕
John Doe	Lab default		9876			👤 ✎ ✕

7. Add Lab Members:
Search for previously registered users to add them as a member of the lab

PI Actions in iLab cont:

- 8) Approving service requests and reviewing/providing payment information
- 9) Approving service requests and reviewing/providing payment information

Access all requests that require financial approval or payment information

8. Financial Approval: Approve or decline financial approval for requests awaiting approval

9. Payment Information: Review or assign payment information for the requests

date	for	service id	status	cost
Jan 13 (Jan 13 2016)	(UTSW) Lab	ACPPC-EB-54	Waiting for Financial Approval	\$1,178.00 (\$678.00)

If you would prefer to delegate these notifications and approvals to specific member(s) of your lab, please email support@ilabsolutions.com with their name and email.

Additional help

More detailed instructions are available in the [PI Manual](#). For any questions not addressed in the manual, click on the “leave iLab feedback” link in the upper right hand corner or contact support@ilabsolutions.com.