


# iLab instructions for PIs

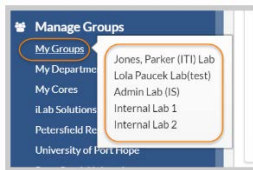
The Microscopy and Imaging Center at Texas A&M is using iLab, an online system for reservations and billing for core service requests. It was indicated that you have researchers who use the core's services, and we wanted to let you know that you may receive email requests from researchers wishing to join your group. The request email will have specific instructions on how to approve the request.

## **Without your approval and assignment of funds, your lab members will not be able to use our services.**

### *1) How to approve lab members and accounts:*

1. Log in to our iLab core facility:  
[https://tamu.corefacilities.org/service\\_center/show\\_external/4561](https://tamu.corefacilities.org/service_center/show_external/4561) .
2. Use your NetID to log into iLab.

3. Once logged in, click on the Menu button  and hover over "My Groups" or "My Labs" where you can select your lab.



4. Set the auto-approval amount if you do not wish to approve service requests below a certain dollar amount. To do this, select the "Members" panel and enter a dollar amount in the "Auto Pre-Approval" amount and click "Save Settings".
5. To approve lab membership requests, select the 'Membership Requests & Accounts' tab. New membership requests will show at the top of this page. Click "Approve" to accept a member into your lab. Click "Reject" if they are not a member of your lab.



6. To approve lab membership request, select the "Membership Requests & Accounts" tab. New membership requests will show at the top of this page. Click "Approve" to accept a member into your lab. Click "Reject" if they are not a member of your lab.
7. This is also where you will select the checkbox(es) to the right of their name for the account number(s) you wish to assign them. You can also set the spending limits above which the lab members need your approval.

**Membership Requests**

✔ No Access Requests require approval

**Manage Accounts**

▶ **Customize Account Grid** (filtered)

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

Filter Account numbers

Filter Members

**account number the lab members are allowed to use**

XX-XXXXXX-XXXXX

Name	Default Account	
Stanislav Vitha	XX-XXXXXX-XXXXX	<input checked="" type="checkbox"/>
Avery McIntosh	None	<input checked="" type="checkbox"/>

**\*\***(for more online help with screenshots, see <http://help.ilab.agilent.com/how-do-i-accept-or-reject-new-lab-members/?rq=membership%20requests>)**\*\***

**You can name one of your lab members as a financial manager if you don't wish to deal with iLab on a regular basis. Select the "Members" tab and click on the small pencil icon. Change their "Lvl" from "Member" to "Manager".**

**Lab members and settings**

Name	Auto Approval Amount	ERP ID	Default FS	Email	Phone	Start Date	End Date	<b>EDIT</b>
<u>Stanislav Vitha</u>	\$100.00		n/a	nnnnnnn@tamu.edu	979-845-1607			
<u>Avery McIntosh</u>	\$50.00		n/a	wexuweirum@tamu.edu	979-845-3639			

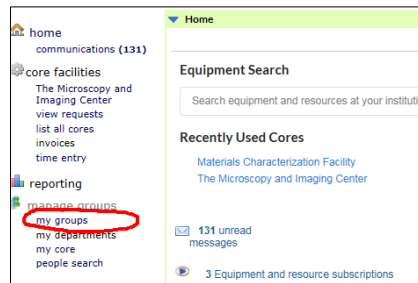
**Lab members and settings**

Name	Auto Approval Amount	ERP ID	Default FS	Email	Phone	Start Date	End Date	
<u>Stanislav Vitha</u>	\$100.00		n/a	vitha@tamu.edu	979-845-1607			
Avery McIntosh	\$50.00		n/a	almcintosh@tamu.edu	979-845-3639			<div style="border: 2px solid red; border-radius: 50%; padding: 5px; display: inline-block;">           Lvl:             Manager             Can order? <input checked="" type="checkbox"/>             Core Financial Contact: <input checked="" type="checkbox"/> </div> <input type="button" value="save"/> <input type="button" value="cancel"/>

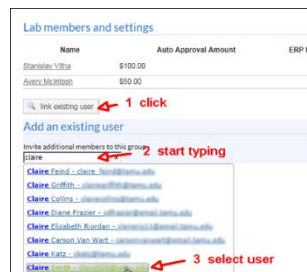
## II) How to add a member from another lab

**\*\*If you have a collaborator at Texas A&M whom you would like to allow use of your funds for the services in the MIC, you will need to add that person as a member of your lab.\*\***

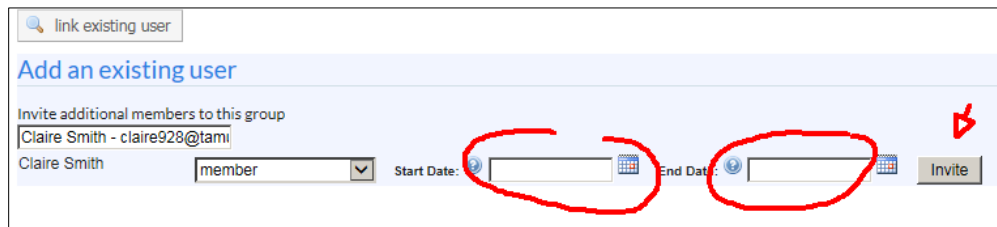
1. In iLab, in go to “my groups” (menu on the left side, see picture) and select your lab.



2. Select the “Members” tab and in the “Lab members and settings” section click the “link existing user” button.



3. Start typing the name of the person you would like to add as a lab member. Select the person’s name from the list.
4. Set the start and end dates for the new member and click “Invite”. The invited member will receive an email.



5. The new member will then be able to use your account number for selected reservations or services through the iLab system.

### Additional help

More detailed instructions can be found by clicking on the “HELP” link in the upper right hand corner or by navigating to [help.ilab.agilent.com](http://help.ilab.agilent.com). For any questions not addressed in the Helpsite, click on the “HELP” link in the upper right hand corner and submit a ticket, or email [ilab-support@agilent.com](mailto:ilab-support@agilent.com).

Feel free to send an email to Ashlyn Montgomery [amontgomery@tamu.edu](mailto:amontgomery@tamu.edu) to ask any questions you have about this process.

