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iLab Solutions: Core Facilities Department Financial Management Feature

Revision Date: 11/5/2012

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What is the Department Financial Management feature?

The Department Financial Management Feature allows Institution Administrators to designate Department Financial Administrators. Then, if a lab is under a department, the Department Administrator has the ability to approve all requests submitted to any core by the lab. The Department Financial Management function is in addition to the approval capabilities of the Institution Administrator. The benefit of the Department Financial Management feature is that it provides alternative approvers for requests when Principal Investigators or Lab Managers are not available when a request exceeds a preapproved amount.

Auto Approval Rules

Lab Managers, Principal Investigators, Department Administrators and Institution Administrators can set an auto-approval amount for each member in their group. This is the dollar value up to which each member can order services without triggering approval. If the auto-approval amount is exceeded for the person placing a request, then an administrator must approve the request.

Additional settings have been added which allow fine-grained control over the approval workflow on a per-department and per-lab basis. For example:

1. Department Administrators can optionally be informed anytime a request requires approval.
2. Department Administrators can optionally mandate that ONLY Department Administrators can approve requests.
3. Department Administrators can set a dollar amount over which requests will require additional approval by Department Administrators.

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How do Institution Administrators set up Departments and Designate Department Administrators?

1. When logged into iLab, click on the name of your institution on the left-hand side to access institution settings.
2. Once on your institution settings page, click on the green bar to open your departments list.

***Figure 1*. Institution administrators can add, view and edit departments within their institution on their institution settings page.**

3. Now you can create a new department by entering the department name in the *Add a new department* text box located at the bottom of the Departments panel (*Figure 2*).
4. To save your new department name, click on the plus icon ( ). **Note: Once the plus icon is clicked, you will see the department populate in the line above the text box.**

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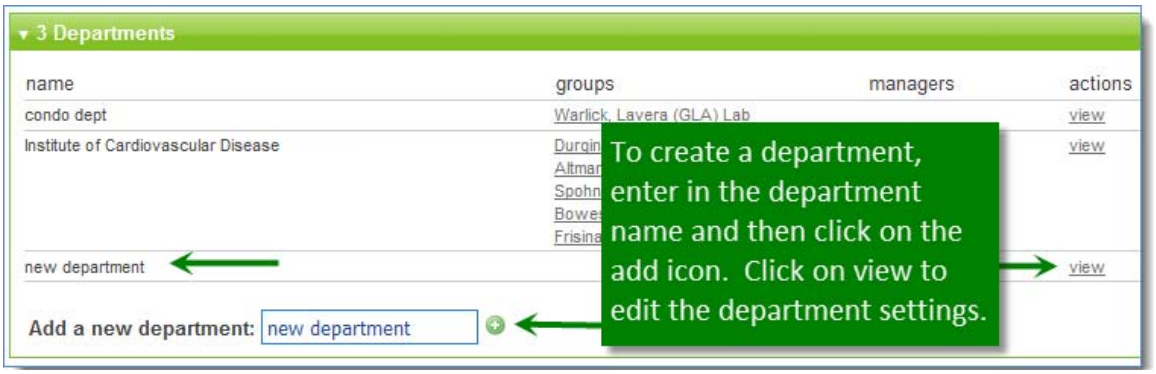

***Figure 2*. On the *Departments* panel, institution administrators can create departments for their institution.**

5. To view the Department settings, click on the *view* button located to the right of the department name (*Figure 2*).
6. Once in *Department Settings* you can add or remove groups (labs) that belong to the department (*Figure 2*). **Note: The lab must already exist in iLab to add it to a department. To see how to add labs, click here.**

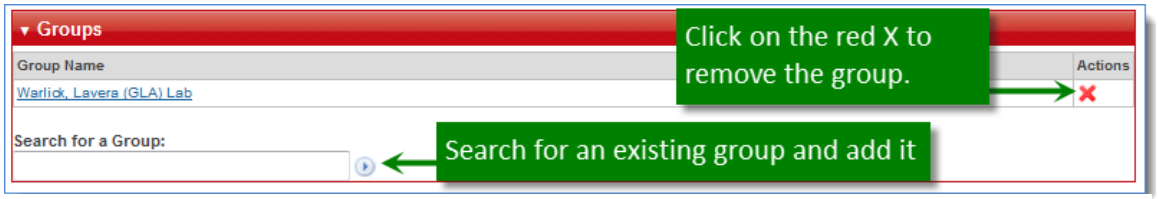

***Figure 3*. Add existing groups to be managed under the department.**

7. To add a Department Administrator to a department click on the yellow *Members* bar within the *Department Settings* page (*Figure 4*).
8. Type the member's name in the search box, and select the correct individual.
9. Then use the drop-down *Invite* menu to assign the appropriate access level.

Note: In order to add a department manager, the individual must already have an iLab account. If they do not already have an account, you can either add them as a new user to a lab or contact support@ilabsolutions.com to have them added.

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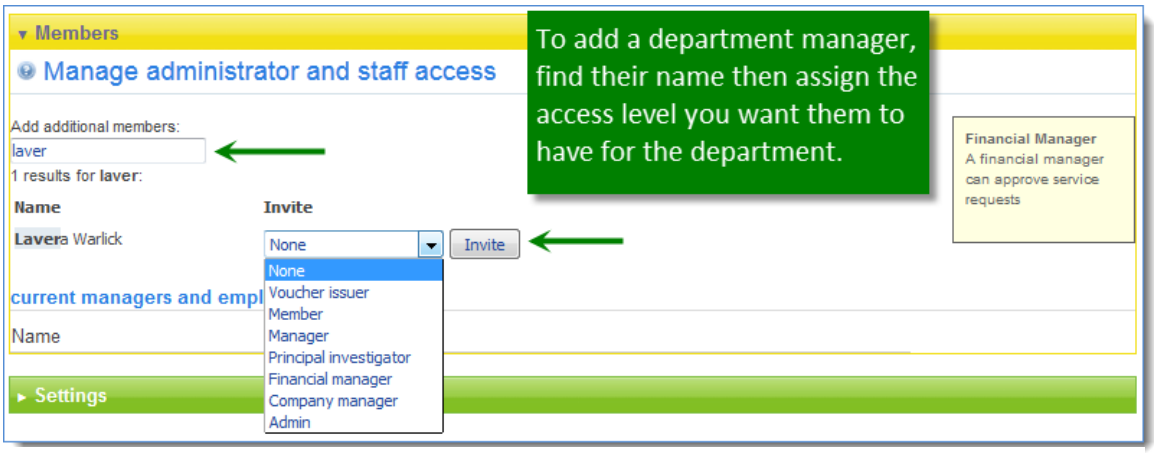

***Figure 4*. Add department administrators under the *Members* panel on the department settings. The individual must have an account with iLab to be added to a department.**

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As a Department Administrator, How do I Manage Department Settings?

When a department administrator logs in, you will see the name of the department you belong to on the left hand side of the iLab page.

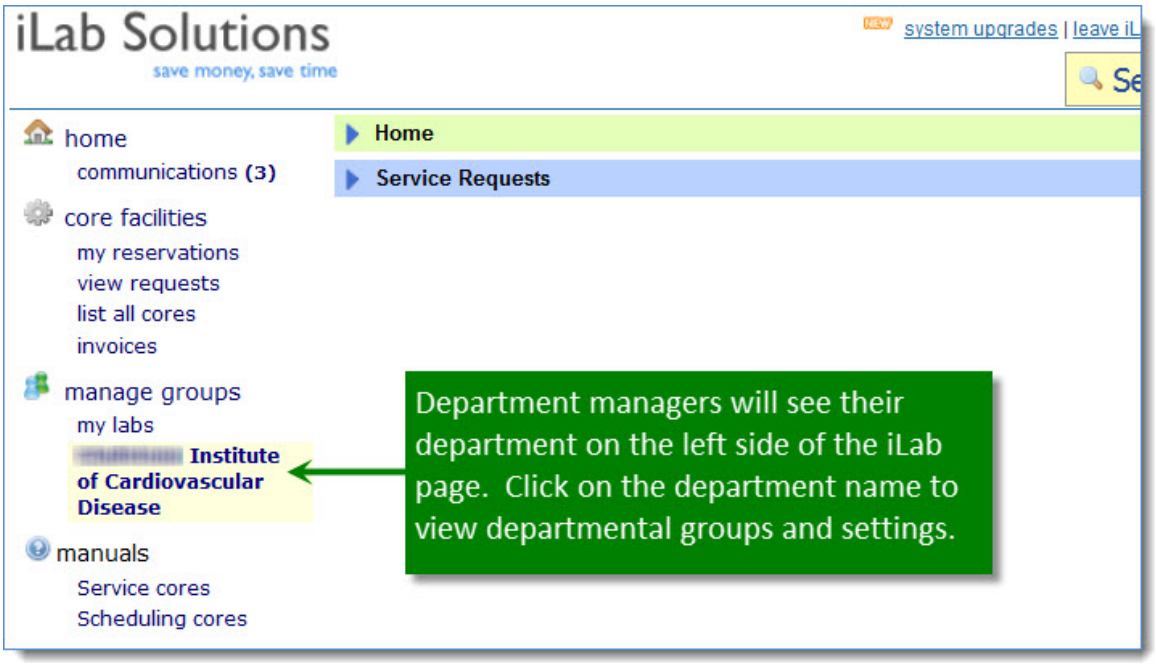

Figure 5. **Department administrators will see the name of the department they belong to on the left side of the iLab page. Click on the department name to view groups under the department and manage settings.**

After you click on the department name, the department settings can be managed within iLab by clicking on the green *Settings* bar on the iLab department page. On the *Settings* panel, you can:

- Set a default auto-preapproval threshold for all labs within a department. **Note: This value can be changed by lab administrators,**
- Set an amount that will require department approval regardless of the lab's auto-approval settings,
- Select to receive lab access requests and service request approval emails and/or designate individual lab contacts to receive these emails.
- Select to solely approve requests, and

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- Choose to be listed as the recipient for all invoices created for labs associated with the department.

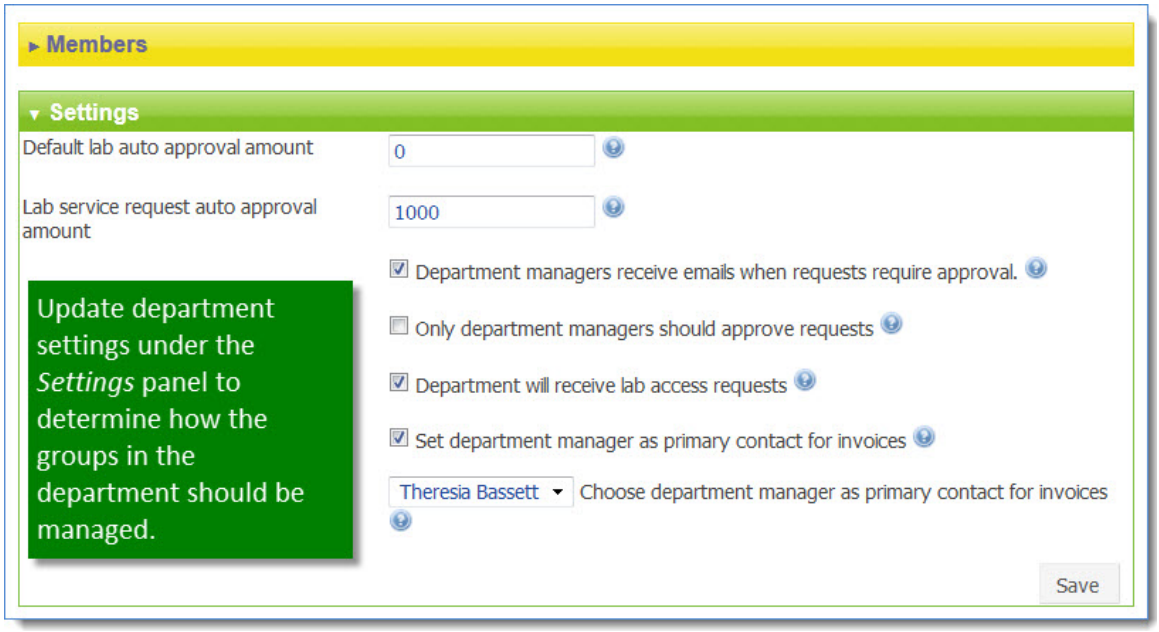

***Figure 6*. Edit the department settings to determine how the groups in the department will be managed by administrators.**

Once the you are set up to approve requests, you can access all requests from all labs associated with the department. To manage requests, please do the following:

1. Click on the *view requests* link located on the left side of the iLab homepage.
2. On the view request page, you can view requests at varying stages by clicking on the tabs at the top of the page (figure 6). The request filter options are:
    a. Awaiting Approval
    b. Require Payment Info
    c. Processing and Recently Completed
    d. All Requests

    Note: Within each request view, there is a filtering panel to help you quickly find a specific request.

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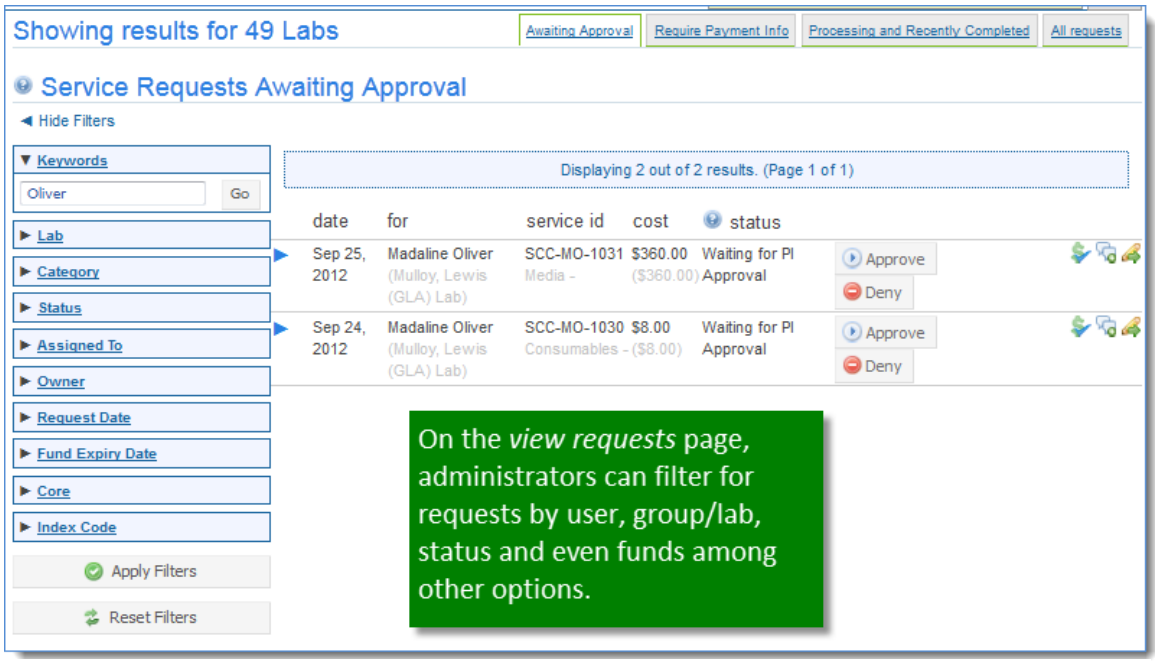

***Figure 7*. Administrators can then view requests made from groups under their department by clicking on the view requests on the left side of the iLab page. Filter options make it easier to find requests you are looking for.**

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As a Department Administrator, how do I manage Labs?

Under the department's page, you will see a list of the groups or labs under your department (*Figure 8*) under the red *Groups* panel. Click on the name of the lab you would like to manage.

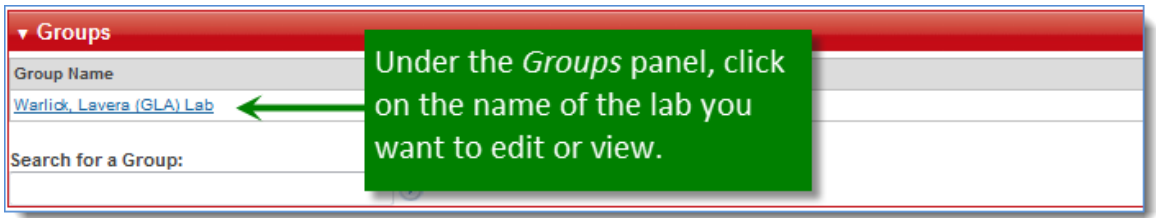

Figure 8. **On the Departments page, you can view a list of labs under the department from the *Groups* panel. Click on the lab name if you want to view more details of edit lab settings.**

For more information on managing labs, please click here.

If you have any questions, please contact us at support@ilabsolutions.com.

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