

Lab Management Manual for iLab

Managing Labs in iLab

The PI or Lab Manager may log into iLab to manage their projects and requisitioning. Once you are logged into iLab, click on the *my labs* link on the left panel to view the *Members* tab under the lab page. Under the *Lab-wide approval settings*, the PI or lab manager may set the auto-approval threshold and the cost overage buffer. This requires that the PI or lab manager must approve any services with an estimated cost above the threshold and must re-approve the service request if the actual cost goes over the buffer cost. Under the *Lab members and member settings*, a list of all lab members is shown. The PI or lab manager may edit the lab members' status by clicking the yellow pencil to the right of their name.

The screenshot shows the 'Dixon Lab' management page. At the top, there are navigation tabs: 'Membership Requests & Projects', 'Members (2)', 'Budgets', 'Assets', 'Bulletin board (0)', and 'Group Settings'. Below this is the 'Inventory Settings' section with a radio button for 'Default product owner to request owner' set to 'No'. The 'Lab-wide approval settings' section has two input fields: 'Auto-approval threshold' set to '\$0' and 'Cost overage buffer' set to '\$100'. Below this is a table for 'Lab members and member settings' with columns for Name, Auto Approval Amount, Email, and Phone. The table lists 'Daryl Dixon' with a 'Group default (\$0.00)' auto-approval amount and email 'ddixon@university.edu'. At the bottom, there are buttons for 'add new user' and 'link existing user'.

They may also add existing users to the lab (*existing users* are users with existing iLab accounts) or add new users (users who do not have an iLab account). The PI and lab managers of the lab may approve service requests, set the pre-approval rate per lab member, and assign funds to lab members.

The screenshot shows the 'Add an existing user' form. At the top, there are buttons for 'add new user' and 'link existing user'. Below this is the 'Add an existing user' section with a text input field containing 'Hem Neo Admin'. Below the input field, there is a 'Can order?' checkbox and a dropdown menu set to 'member', followed by an 'Invite' button. At the bottom, there is a copyright notice: '©2006 - 2014 iLab Solutions, LLC.'

For PIs or lab managers to approve a service request that is above the pre-approval threshold, click on the *view requests* link on the left panel. All service requests requiring PI or lab manager approval are located under the *Awaiting Approval* tab. Use the other tabs to view service requests with other statuses.

The screenshot shows a web application interface. On the left is a sidebar with navigation options: home, communications (5710), favorites, assets, products, projects, locations, search assets, search network, find inventory, core facilities, view requests, list all cores, invoices, and requisitioning. The main content area is titled 'Service Requests Awaiting Approval' and shows a table with columns: date, for, service id, status, and cost. A red arrow points to the 'view requests' option in the sidebar.

Under the *Membership Requests & Projects* tab, assign projects to lab members. Hover over the project to see the open accounts necessary for Service Center charges and requisitioning. Check the box to the right of the user's name to assign the project to that lab member. When they make a service request to a DFCI core, this project must be selected from a drop down menu to be used to pay for the services.

Manage Projects

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

Name	D	1008115	1233501	3300201	4518104	6224603	7500508
Si	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A	1233501	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
A	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C	1000150	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
R	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ji	1000150	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Under this tab, additional projects may be added to the lab to be assigned to the lab members. Scroll down to the *Request access to additional Projects* and click the blue arrow to open the section. Type in the Project number to be added to the lab, then press the *Request* button. This project will be reviewed and added to the lab after the appropriate approvals.

Request access to additional Projects

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

If you requested the incorrect Project, please email Rachel Goldblatt (rachel_goldblatt@dfci.harvard.edu) to revoke your request.

★ Project

Requisitioning

To manage Requisitioning, click on my labs, and click on the lab name. Go to the Membership Requests and Projects tab to view the available projects and assign projects to lab members. Under the Default Project column, you can assign a default project which will appear each time for ordering products.

Manage Projects

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

Name	Default Project	1214803	5204901	5241601	5543301	6242102	6250601	6253401	8508629	9617643	9617778	9617934
P	5204901	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E	None	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E	None	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jk	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
K	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S	None	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

On the same screen, scroll to the bottom of the screen to set your settings. Here managers can set default Account and Ship To locations for requisitions. Managers can then select from this list within the Manage Requests screen.

Materials Management Settings

Name	Account	Ship To	Location	
7300	7300	HM-010	HM-0342	
7200	7200	HM-0404	HM-010	
7200 MA	7200	DRY DOCK	MA-0446A	
7300 - 0446B	7300	DRY DOCK	MA-0446B	
HIM 320		HM-010	HM-0320	

[Create new](#)

Under the Members tab of the lab, a default location may be set per person.

Lab members and member settings

Name	Auto Approval Amount	Default Account/Ship to/Location	Default FS Email
PH	Group default (\$0.00)	N/A	(n/a)
MEM	Group default (\$0.00)	EMB77	(n/a)
MEM	Group default (\$0.00)	None selected	click to edit
MEM	Group default (\$0.00)	N/A	click to edit

Under Manage Requests, managers can select a project from a drop down menu, and see which accounts are currently open. If a default project was set, this project would automatically populate the project field here.

Managers can add the preferred Account and Ship To location on the far right.

Requesting and Reporting on Services

To request a service, click on the *list all cores* link on the left panel. You will see the core names listed. Click the core you wish to view. You are taken to the main page where you can review their services, request a service, or reserve time on equipment.

PIs and lab managers have access to reporting. Click on the *Reporting* link on the left panel to build a report on your lab's usage of equipment or cost of services.

The screenshot shows a web application interface for generating reports. At the top, there are tabs for 'Charges', 'Requests', 'Events', and 'Requisitioning'. Below the tabs, a welcome message states: 'Welcome to your reporting page. Please use the buttons below to load reports, build new reports or navigate to your reporting homepage. [iLab reporting tutorial](#)'. There are four buttons: 'Load default', 'Load saved', 'Build new', and 'Reporting home'. The 'Report settings' section includes four steps: 1. Select a date range: Start: December 1, 2014, End: December 31, 2014; 2. Select date field: Purchase date; 3. Customize display: Charts and tables...; 4. Apply settings: Run report!. Below this is a title 'Charge reporting for December 1, 2014 to December 31, 2014 by purchase date' and a 'Hide Filters' button. A row of action buttons includes 'Save...', 'Share...', 'Email...', 'Export...', and 'Print preview...'. A message in the center says 'No data was available. Please choose a different date range.' On the left sidebar, there are various navigation options like 'favorites', 'search assets', 'find inventory', and 'requisitioning'. A red arrow points from the 'requisitioning' section in the sidebar to the 'Core' filter option in the 'Hide Filters' dropdown menu.

For more information, click on the *Support* link on the top right of your screen to view additional manuals. Or click the *leave feedback* link to request assistance with using the software or reporting problems.