

Lab Management Manual for Institution Admin

Managing Labs in iLab

Once logged into iLab, click on the *Newcastle University* link on the left panel to view the institution page. The *Cores* tab gives you an overview of the core facilities using the software at the institution. Click on the core's name to link directly to the core. Click on the *Memberships* tab to access the list of labs in iLab.

The screenshot shows the iLab interface for Newcastle University. The left sidebar has a red arrow pointing to the 'Newcastle University' link under the 'reporting' section. The main area displays the 'Cores' tab with a summary of statistics for live cores over the last 12 months. Below the statistics is a table with one entry: 'Bio-Imaging Unit'.

Core Name (showhide payment configuration)	Primary Contacts	Live?	Days since last billing	Recent Requests
Bio-Imaging Unit	Alex Laude	no		

On the *Memberships* tab, open the *Research Groups* bar to view the list of Newcastle University's PIs and their labs. Click on the *Name* under the left column to view the lab and add new Grant Codes.

The screenshot shows the iLab interface for Newcastle University with the 'Memberships' tab selected. The 'Research Groups' section is expanded, showing a list of research groups. A red arrow points to the 'Research Groups' section header.

name	department	organization	managers
Admin Newcastle Lab			iLab Administrator Newcastle
Bio-Imaging Unit (Newcastle) Lab			Alex Laude
Sieber-Blum, Maya (Newcastle) Lab			Maya Sieber-Blum Anne Haslehurst

The *Members* page of lab opens after clicking the link. Under the *Lab-wide approval settings*, the auto-approval threshold and the cost overage buffer may be set. 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 institution admin, PI, or lab manager may edit the lab members' status by clicking the yellow pencil to the right of their name. 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. Lab members do not have access to the lab page.

The screenshot shows the 'Admin Newcastle Lab' interface. At the top, there are navigation tabs: 'Membership Requests & Grant Codes', 'Members (1)', 'Budgets', 'Bulletin board (0)', and 'Group Settings'. Below this, there are three main sections:

- Inventory Settings:** A section with a radio button for 'Default product owner to request owner' set to 'No', and a 'Change' button.
- Lab-wide approval settings:** A section with a warning icon and a pencil icon. It contains two input fields: 'Auto-approval threshold' set to '£ 100' and 'Cost overage buffer' set to '£ 100'. A 'Save Settings' button is below these fields.
- Lab members and member settings:** A section with a table of lab members. The table has columns for 'Name', 'Auto Approval Amount', 'Billing System ID', 'Email', and 'Phone'. One member is listed: 'iLab Administrator New...' with 'Group default (£0.00)' for the approval amount and 'support+newcastle@ilabsolutions.com' for the email. Below the table are buttons for 'add new user' and 'link existing user'.

Red arrows in the image point to the warning icon, the 'link existing user' button, and the 'Lab members and member settings' section header.

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 at other statuses.

The screenshot shows the 'Service Requests Awaiting Approval' interface. On the left, there is a navigation menu with links for 'home', 'communications (0)', 'core facilities', 'my reservations', 'view requests', 'list all cores', 'reporting', 'manage groups', 'my labs', and 'my departments'. The main content area has a header with tabs: 'Awaiting Approval', 'Require Payment Info', 'Processing and Recently Completed', and 'All requests'. Below the tabs, there is a 'Service Requests Awaiting Approval' section with a 'Show Filters' button. A table is displayed with columns for 'date', 'for', 'service id', 'status', and 'cost'. The table shows 'Displaying 0 out of 0 results. (Page 1 of 0)'. A red arrow points to the 'view requests' link in the left navigation menu.

Under the *Membership Requests & Grant Codes* tab, add grant codes and assign them to lab members. Check the box to the right of the user's name to assign the Grant Code to that lab member. When they make a service request to a core, this number may be selected to charge the service against. Lab members cannot reserve time on equipment or request a service without a grant codes assigned to them.

Admin Newcastle Lab

Membership Requests & Grant Codes Members (1) Budgets Bulletin board (0) Group Settings

Membership Requests
✔ No Access Requests require approval


Manage Grant Codes

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

	3012345A	TESTABCD
iLab Administrator Newcastle	<input type="checkbox"/>	<input checked="" type="checkbox"/>

[Manually add a new Grant Code](#)

[Manage Grant Codes](#)



Grant codes can be added to a lab by opening the *Manually add a new Grant Code* link and typing in the number. You can also deactivate an account number by using the *Manage Grant Codes* section.

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	TESTABCD
iLab Administrator Newcastle	<input checked="" type="checkbox"/>

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★ Grant Code:

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