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.

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 *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.

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.

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.

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.