



Indiana University

# Managing your Lab and KFS Funds in iLab

User Manual

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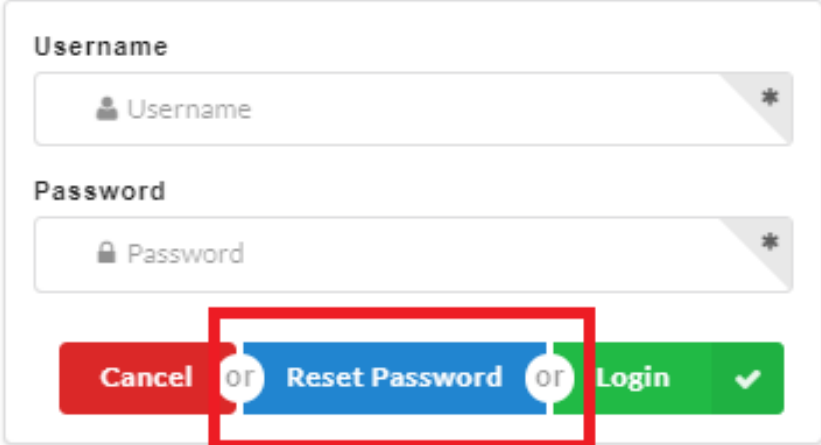
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## Reset password for your iLab account

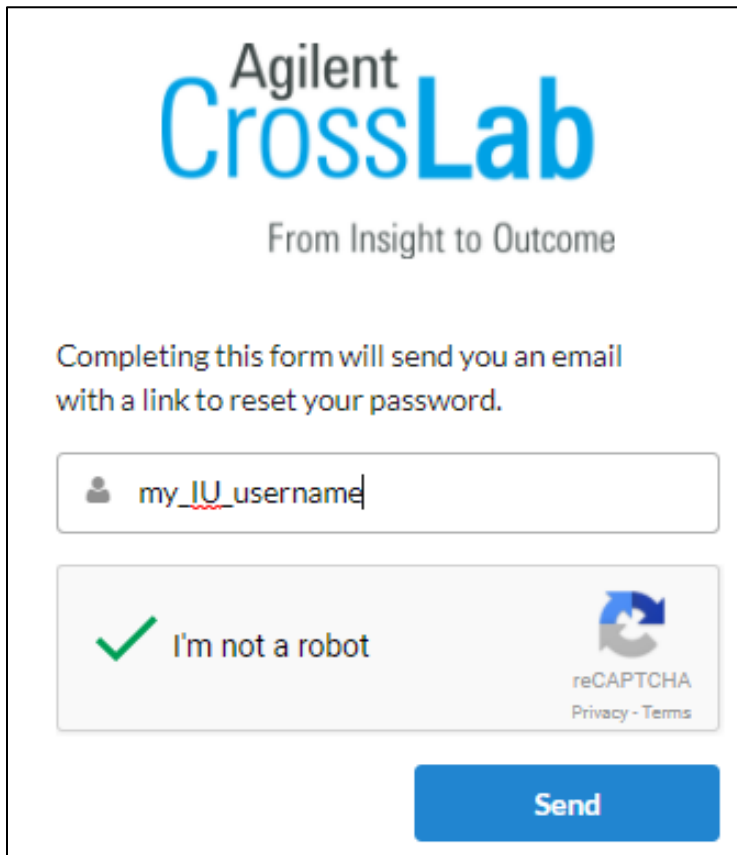
If you are a PI and own IU KFS accounts, you probably already have an iLab account. To verify,

1. Please go to [https://my.ilabsolutions.com/service\\_center/show\\_external/4161](https://my.ilabsolutions.com/service_center/show_external/4161), click on the Login button seen on top right, and click on Reset password button in the popup.



The screenshot shows a login and password reset form. It features two input fields: 'Username' and 'Password', each with a placeholder icon and an asterisk. Below the fields are three buttons: a red 'Cancel' button, a blue 'Reset Password' button, and a green 'Login' button with a checkmark. The 'Reset Password' button is highlighted with a red rectangular box. Below the buttons, there is a text prompt: 'If you don't have an account, please [register](#) for an iLab account.' At the bottom, there is a link: 'Learn more about [iLab Operations Software](#)'.

2. Enter your official IU account name to reset your password.



The screenshot shows the Agilent CrossLab password reset interface. At the top, the logo reads "Agilent CrossLab" with the tagline "From Insight to Outcome". Below this, a message states: "Completing this form will send you an email with a link to reset your password." There is a text input field containing "my\_IU\_username" with a user icon on the left. Below the input field is a reCAPTCHA widget showing a green checkmark and the text "I'm not a robot", along with the reCAPTCHA logo and "reCAPTCHA Privacy - Terms" link. At the bottom right of the form is a blue "Send" button.

If this does not work, you do not have an account. Please use the instructions in user manual for registering a new account. User manual can be found here- [https://my.ilabsolutions.com/service\\_center/show\\_external/4161](https://my.ilabsolutions.com/service_center/show_external/4161)



## PI roles and workflows

### Assigning account access to lab member:

1. Click on 'My Labs' on the left-hand menu. Your lab should come up - click on it.
2. Click on 'Membership Requests and Accounts' tab.
3. Under 'Manage Accounts' section, a table of members and accounts should be visible.
  - a. Click on the account checkbox to give lab members access to that account.
  - b. Lab members without grant account access cannot reserve microscope time.

**Manage Accounts**

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

Name	Default Account		
	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	None	<input type="checkbox"/>	<input type="checkbox"/>
	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	None	<input type="checkbox"/>	<input type="checkbox"/>

*Note: A red arrow points to the first empty row, and a red box highlights the checkbox in the second-to-last row.*

### Adding a grant to your list (usually an internal grant):

1. Click on "Request access to additional Accounts"
2. Fill in grant number with format: "<Account\_number>-<SubAccount\_number>", click request. If there is no sub-account for the KFS account you are requesting, "<Account\_number>-" (Notice the hyphen at the end).



**AAA Default (IU) Lab**

**Note from institution:**  
 Note for Lab Page header setting appears here. To configure your message to internal PIs/FOs, click the 'Indiana University' link in your left menu to the 'settings' tab and adjust the copy for the setting 'note for lab page header'. Once set, scroll down the page and click 'save'.

Membership Requests & Accounts    Members (8)    Budgets    Bulletin board (8)

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**Membership Requests** 1.

✓ No Access Requests require approval

**Manage Accounts**

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

Name	Default Account		
	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	None	<input type="checkbox"/>	<input type="checkbox"/>
	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	None	<input type="checkbox"/>	<input type="checkbox"/>

**Request access to additional Accounts** 2.

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

★ Account

- The request will go to your fiscal officer for approval. Until they become used to this process - it may help if you also send them an email and ask that they respond to the iLab request.



## Controlling lab membership

Click on Members tab. Your lab members with iLab accounts will be listed.

1. **To add a lab member –**
  - a. click on link existing user.
  - b. Type part of person's name.
  - c. Search for the person using his/her first and last name in the search box.
  - d. Then give that person grant access.
2. **To delete a lab member –**
  - a. click red X to right of name.

Membership Requests & Accounts
Members (8)
Budgets
Bulletin board (8)
Group Settings

### Lab-wide approval settings 1.

Click the pencil icon next to the person below whom you would like to make the financial approver.

Default auto-approval threshold    \$

Cost overage buffer                    \$

save approval settings

### Lab members and settings

Name	Auto Approval Amount	ERP ID	Default FS	Email	Phone	Start Date	End Date	
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						

link existing user

1.a

2.a



## Assigning finance/lab manager role in iLab:

You may give someone else in your lab the ability to manage accounts by assigning a lab manager.

1. In the members tab, click on pencil icon next to name of person you would like to assign role of lab manager.

**Lab members and settings**

Name	Auto Approval Amount	ERP ID	Default FS	Email	Phone	Start Date	End Date	
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						
Lab default (\$500.00)		n/a						

*Note: A red box highlights the pencil icon in the 5th row, which opens a modal with the text "Edit this user's membership."*

2. A box will appear marked lvl (level). Select "manager" from menu.
3. Check the 'Core Financial Contact' checkbox. Click 'Save'.

*Note: A red box highlights the 'Lvl:' dropdown menu showing 'Member', the 'Core Financial Contact:' checkbox, and the 'save' button.*

This will provide the Lab Manager access to all lab accounts.

## Contact us

If you have any additional questions, do not hesitate to send us an email at [ABITC-ilab@rtinfo.indiana.edu](mailto:ABITC-ilab@rtinfo.indiana.edu)