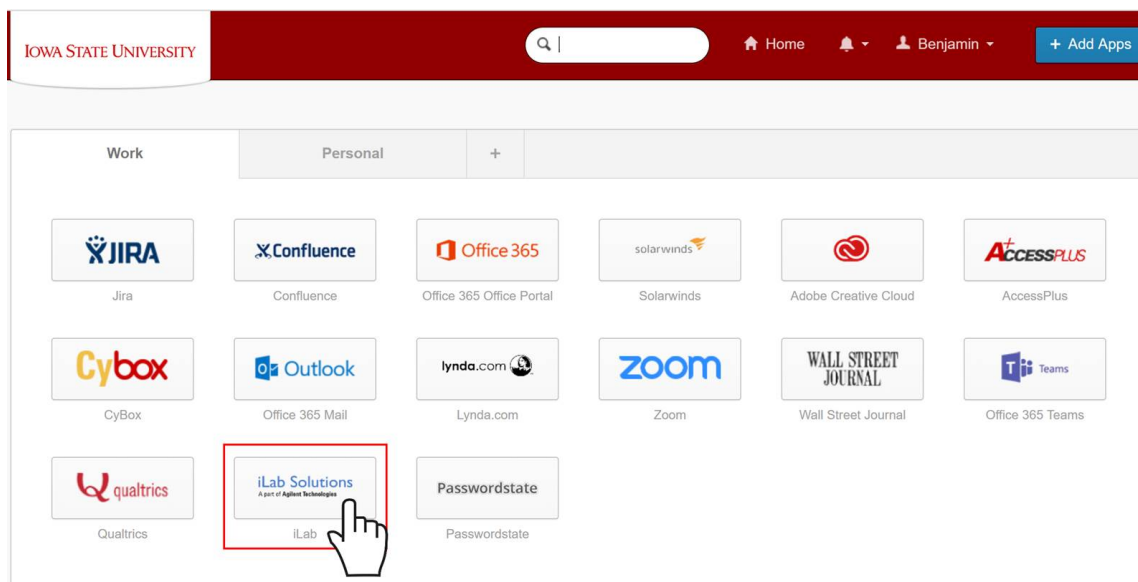# iLab SOP for Lab PI's – Members and Roles

Please log into iLab to assign your researchers to your group and allow them access to funds.

To do this, begin by navigating to **_iastate.okta.com_** in your web browser. Here you will see Iowa State's newest login portal, Okta. Okta is an application that allows you to log in once to numerous ISU web applications. Simply log into Okta using your ISU Credentials and click the link to your app of choice!

Once signed into Okta, click the **_iLab_** icon (you may need to use the Add Apps feature in Okta to add the iLab app).

Members Tab Layout

1. **Lab-wide approval settings**: Set the financial approval thresholds across the Lab/Group

2. **Lab member and settings:** Add/remove users from the lab/group and manage their settings

Set Approval Thresholds

Every Service Request submitted by your lab members is subject to a financial approval (for more information see Request Services). You can define two settings for your lab related to these financial approvals:

Lab-wide approval settings

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

Default auto-approval threshold $ 500

Cost overage buffer $ 100

save approval settings

- **Default auto-approve threshold**: This setting defines the maximum dollar amount of a service request that can be automatically approved. In the example above, a service request can have a cost of up to $500 to receive auto-approval.

- **Cost overage buffer**: This setting defines the amount that a service request can go over original agree-upon cost before a notification is sent to the PI and Lab Managers. In the example below, a service request can go $100 over the original cost before a notification is sent.

Manage Lab/Group Members

The Manage Lab/Group Members panel can be used to add/remove members from the lab/group and to manage various settings for the members.

Lab members and settings

Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date	End Date	
Sample PI	Lab default ($500.00)		sample.pi@ilabx.com				1
Sample Manager	Lab default ($500.00)		sample.manager@ilabx.com				
Sample Member 1		Lvl: Member Can order?: ☐ Core Financial Contact: ☐	sample.member1@ilabx.com				save cancel
Sample Member 2	Lab default ($500.00)		sample.member2@ilabx.com				

3 add new user   4 link existing user

1. **Member icons**: The various icons cab be used to view (or modify) information about each member:

   o **Role** (person icon): Hover over this icon to display the role of the user. Blue icons indicate PIs or group members, while yellow icons indicate lab/group managers.

   o **Financial contact** (dollar icon): This icon indicates that the manager is also a financial contact. This means they will be sent a notification e-mail when a service request by one of the lab members requires financial approval. It will also list the manager as a financial contact for core staff, so they can be more easily communicated with (e.g. to manually send copies of invoices). Note that all lab managers can perform financial approvals; the financial contact status only impacts if they receive notification.

   o **Edit member** (pencil icon): Allows you to edit various fields and setting for the member (see item 2 below).

- o **Remove member** (red X icon): Remove the user from this lab. They will not be deleted from iLab altogether, only their association with this lab will be removed.

2. **Edit member**: As described above, clicking the pencil icon allows you to edit various fields for the member:

   - o **Auto Approval Amount**: You can override the lab default auto-approval threshold for each member with this field, for example to provide certain lab members with more discretion in making purchases.

   - o **Lvl**: This drop-down specifies the role of the lab member, i.e. Member, Manager or Principal Investigator

   - o **Can order?**: Not applicable at ISU.

   - o **Email**: The contact e-mail address of the user (does not impact the e-mail address they use to login with)

   - o **Phone**: Contact phone number for the user

   - o **Start date**: The start date for the user as a member of the lab/group. If set to a point in the future, the user will not be associated with the lab until the start date. This can be used to set up lab members in advance, without giving them access until their start date. If left empty, the user will be active immediately.

   - o **End date**: The end date for the user as a member of the lab/group. After the end date, the user will be removed from the lab. Any charges with a purchase date prior to the end date can be successfully billed, but no new charges can be incurred against the funds of the lab. If left empty, the user will be a member indefinitely. To review and possibly modify lab members whose memberships expired (for example, to extend their membership), click on the "Show expired memberships" link (only visible if there are expired memberships):

Lab members and settings   Show expired memberships

Name	Auto Approval Amount	ERP ID	Default FS	Email	Phone	Start Date	End Date	
Sample PI	Lab default ($500.00)		N/A	sample.pi@ilabx.com				👤 $ ✏️
Sample Manager	Lab default ($500.00)		N/A	sample.manager@ilabx.com				👥 $ ✏️ ✕
Sample Member 1	Lab default ($500.00)		N/A	sample.member1@ilabx.com				👤 ✏️ ✕
Sample Member 2	Lab default ($500.00)		N/A	sample.member2@ilabx.com			Mar 14, 2018	👤 ✏️ ✕

   - o **Save / Cancel**: Save the modified fields or cancel any changes.

3. **Add new user**: If enabled for your institution, create a new user and add them to your lab. Complete the fields as described above under *Edit member* and click "Add". The user will send a welcome e-mail with username and password.

⊕ add new user   🔍 link existing user

Create a new user

First name: _____
Last name: _____
E-mail: _____
Institutional e-mail is preferred
Role   Manager ▼
Start Date: ❓ _____ 📅   End Date: ❓ _____ 📅
[Add]

4. **Link existing user**: Add an existing user to your lab as a member. Type part of the name in the search box, select the user, complete the role, start date and end date fields, and click "Invite".

⊕ add new user   🔍 link existing user

Add an existing user

Invite additional members to this group
Sample Lab Admin - sample.lab.ad
Sample Lab Admin   member ▼   Start Date: ❓ _____ 📅   End Date: ❓ _____ 📅   [Invite]