# iLab SOP for Lab PI's – New lab members and assigning funds

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).
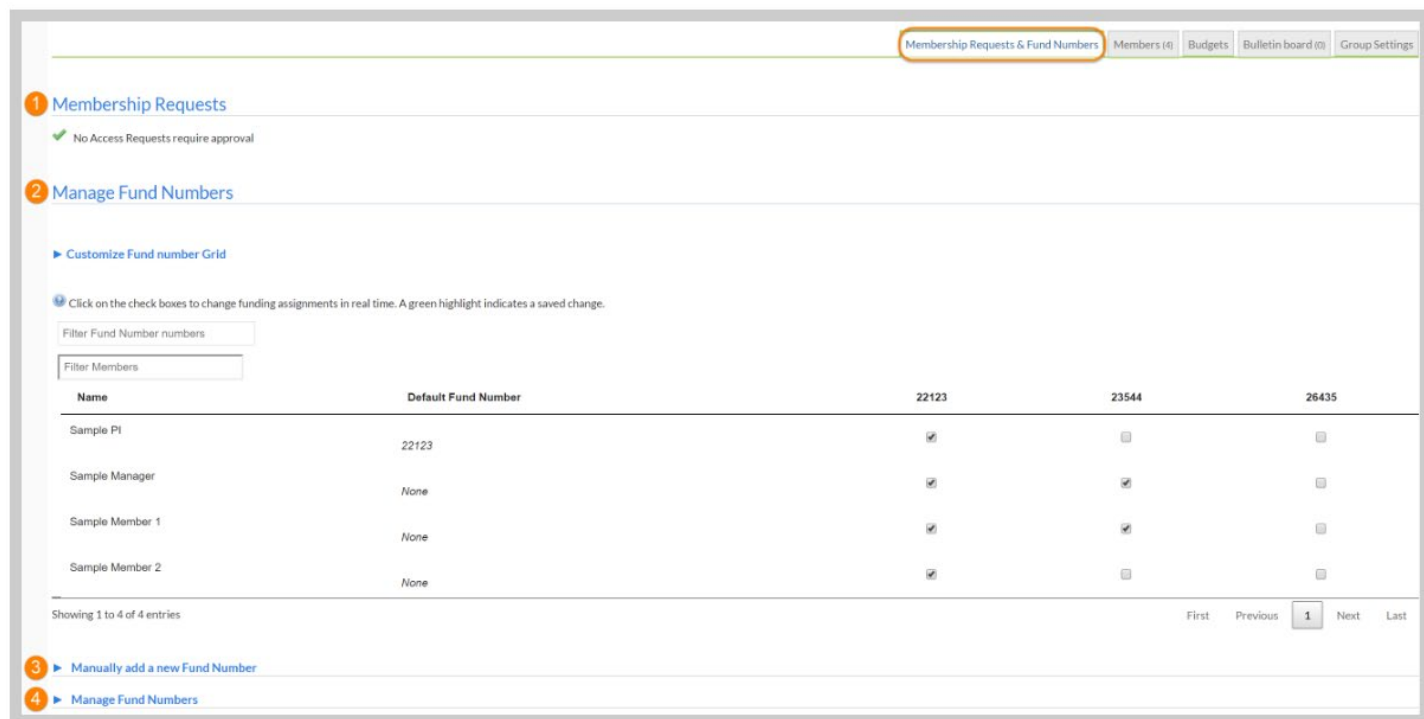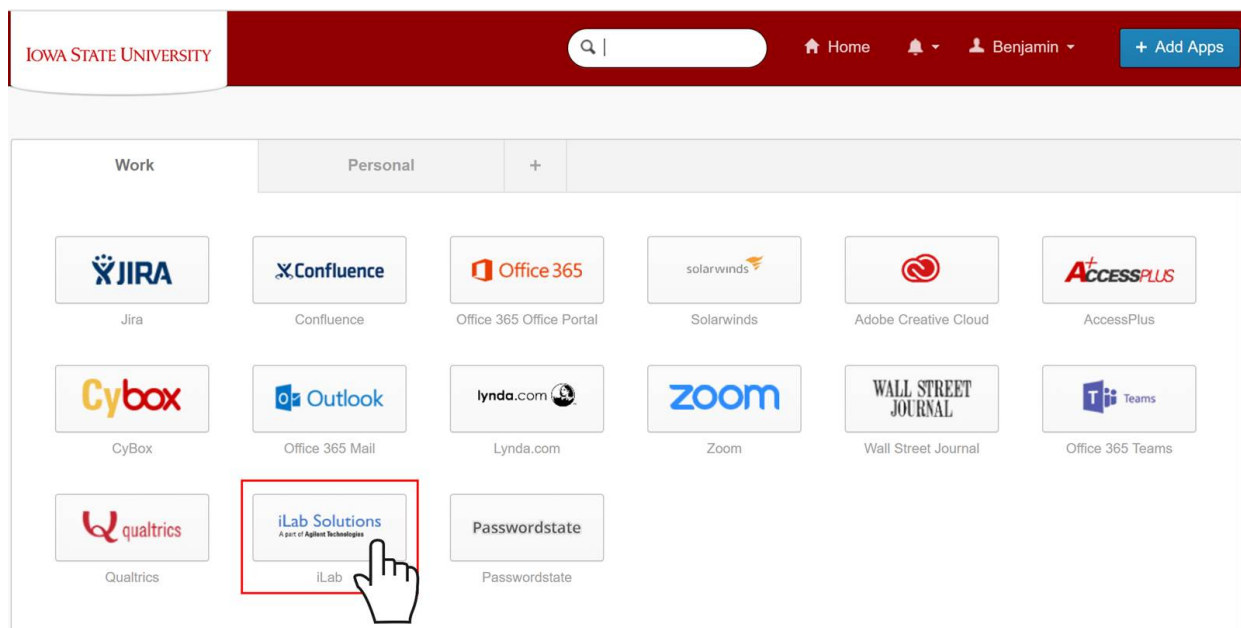
1   Upon first login to iLab, you will be prompted to create a password. After logging in, you may be prompted with pending requests from researchers seeking access to your group. Click the link to open the drop down menu for your lab(s) and then select the lab with pending requests.

▶ Getting started

▼ Home

🏠 home
   communications (0)

⚙ core facilities
   view requests
   list all cores

📊 reporting

👥 manage groups
   my groups
   people search

Equipment Search

Search equipment and resources at your institutions...   ▼

⚠ 3 researchers are seeking access to   1 lab you manage

Once clicked, the Account Management page for your lab opens. Approve (or deny) the requests to your lab. Once approved, the researcher moves to the Funding Account Matrix where you can assign (or unassign) access to specific funding accounts.

[❸ Membership Requests & Funds] [Members (2)] [Budgets] [Bull...

Membership Requests

⚠ Several Access Requests require approval

Date	Name	Email	Actions
⚠ Mar 28 '18	Ryan Gebhardt	ryangeb@iastate.edu	✔ Accept ⊖ Reject
⚠ Mar 28 '18	Michael Lazar	mlazar@iastate.edu	✔ Acc... ⊖ Reject
⚠ Apr 02 '18	Adriana Joyce	ajoyce@iastate.edu	✔ Accep... ⊖ Reject

② **Manage Fund Numbers**: The main purpose of this interface is to assign/unassign access to funds for each of your group members (the "*Fund Grid*").

Manage Funds

▶ Customize Fund Grid

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

Filter Fund numbers

Filter Members

Name	Default Fund	401-20-06	401-20-08	404-60-31	420-62-47
Steve W. Martin	*None*	☑	☑	☑	☑
Melinda Hoyt	*None*	☐	☐	☐	☐

Showing 1 to 2 of 2 entries   First   Previo...

Once assigned funds, and once they receive training on the equipment, your researchers will be able to schedule time on the equipment.

③ **Manually add a new Fund Number**: This interface lets you enter additional funds. Once a fund is added, it can be assigned as in step 2.
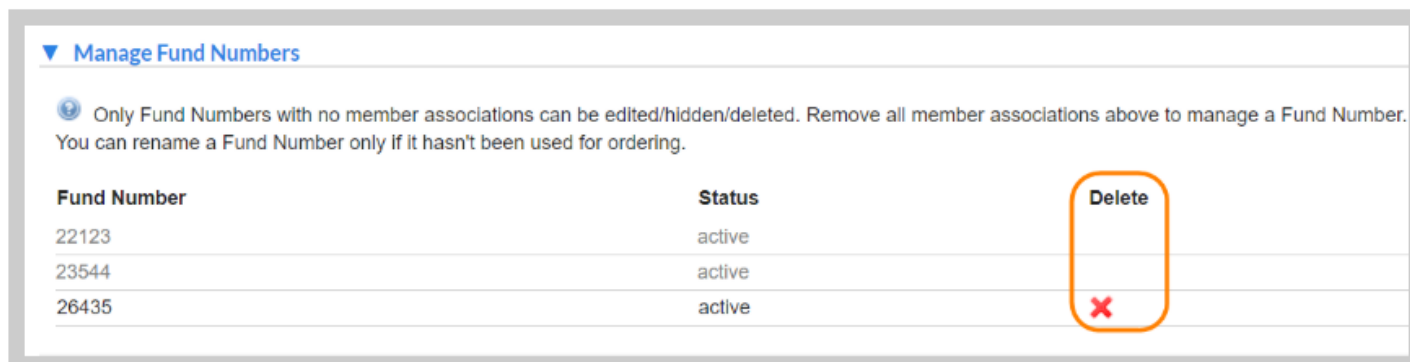

**If an existing fund number has expired and you need to replace it with a new one:
  a. Add the new fund number.
  b. Assign the new fund number to lab group members.
  c. Unassign the old fund number from lab group members. If they have pending charges, iLab will ask if you want to reassign the charges to a new fund number and will give you a drop-down menu to choose other fund numbers that lab member is assigned to. This is why you must assign the new fund number before unassigning the old fund number.

④ Once a fund number is no longer assigned to any lab group members, it can be deleted (you will need to reload the page after unchecking the boxes for that fund number before it is available to be deleted):

At this point, you can log out. Feel free to explore the iLab system and familiarize yourself!

Please direct any questions to Michelle Grawe, mgrawe@iastate.edu.