

iLab for Principal Investigators & Lab Managers

Introduction to the fundamental uses of iLab for Principal Investigators and Lab Managers.

Signing up for iLab

An iLab account will allow for you to easily request services from Columbia's service centers (35+) and facilitate payment as it is directly linked to our finance system. PIs are able to add lab members to their lab, which allows them to request services on their behalf and use payment information specific to the projects that they're working on. The payment information that each lab member has access to can be restricted by the PI to ensure that budgets are adhered to and financial errors do not occur.

An iLab account will automatically be created for you if you have a sponsored project(s) that is already mapped to you in the Columbia finance system. Sponsored projects have chart strings where the project starts with a GG, IN, or PG. In order to check if you already have an iLab account, please log in with your UNI info through the link below.

PIs can request an account (If there hasn't been one created already, confirm by first trying to log in with your UNI) to manage usage by their lab members by emailing ilab-support@agilent.com and CCing jh3293@cumc.columbia.edu to have an account manually created for them. In order for a PI to have a lab setup in iLab, they must have a valid chart string to associate with it to pay for services they request.

Lab Managers should sign up for an account using this > [LINK](#) < to join their Principal Investigator's lab if they don't already have an iLab account.

Logging in:

1. Go to <https://cumc.corefacilities.org>
2. Login with your UNI ID login.
 - o If you are taken to a registration page, please [contact the VP&S Office for Research](#).
3. Look for the link in the left-hand menu that says '**my labs**'. Hover-over and select your lab to go to your lab management page.

Responsibilities in iLab:

As a Principal Investigator or Lab Manager, you have a few new responsibilities to enable your researcher team to order services from the cores and make equipment reservations, specifically:

- Accepting users into your lab (see item 1 below)
- Assigning chart strings to lab members (see item 2 below)
- Adding additional chart strings to your lab, if applicable (see item 3 below)
- Disable chart strings that are not used and/or enable them to be used (see item 4 below)
- Approving certain core service requests (see item 5 below to set the threshold)
- Managing lab members and their rights (see item 6 below)

Lab

Membership Requests & Chart Strings | Members (7) | Budgets | Bulletin board (1) | Group Settings

Membership Requests

Date	Name	Actions
Apr 24 '17	Luis Araujo	Accept Reject

1. Accept Lab Members
If users are requesting to be added to this lab, their request will be listed here with Accept/Reject options.

Manage Chart Strings

Name	Default Chart String	GG0117	GG0117	GG0117
Asa Abellovich	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Guy Ludwig	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heon Lee	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Assign Funds to Lab Members
Use the check boxes to assign which lab member can access which funds to pay for iLab services.

3. Add Non-Sponsored Funds
Request access to a non-sponsored fund to be added to your lab. URs must be approved by Jennifer Williamson Catania jlw61@cumc.columbia.edu.

Request access to additional Chart Strings
If you don't see a Chart String that you should have access to, please type it in below. The Sys notification and approve or deny your request.
To request a non-sponsored fund please enter the project-activity. Only the following fund types m UR, PC, EN, IN

Chart String Request

4. Disable/Enable Funds
Use the check boxes to remove a fund from or add a fund to the lab grid above.

Disable/Enable Chart Strings
select all | select none
☒ GG0117 ☒ GG044779-0
Save changes

Lab

Membership Requests & PIDs | **Members (4)** | Budgets | Bulletin board (0) | Group Settings

Lab-wide approval settings

Click the pencil icon next to the person below whom you would like to set the approval threshold.

Auto-approval threshold: \$1.0
Cost overage buffer: \$100

5. Set Approval Threshold
Set the amount above which new requests (or cost overages) require financial approval from authorized lab personnel.

Save Settings

6. Manage Lab Members:
Use "X" to remove a member from this lab, pencil icon to edit start and end date of a user, and rights for lab members ("managers" can provide approvals on PI's behalf, and financial contacts indicated with \$ icon will also receive approval emails).

Lab members and settings

Name	Auto Approval Amount	Email	Phone	Start Date	End Date	Actions
Mark Medina	Group default (\$1.00)	mmedina@uthscsa.ilabx.com				
Ruby Researcher	\$1,000.00	rresearcher@ilabx.com				
Makenna Researcher	Group default (\$1.00)	mresearcher@ilabx.com		May 1, 2015	Aug 31, 2015	
Nick Researcher	Group default (\$1.00)	nresearcher@ilabx.com		May 1, 2015	Dec 31, 2015	

Delegating lab notifications and approvals

If you're a Principal Investigator and would prefer to delegate these notifications and approvals to specific member(s) of your lab, for example your lab manager or department administrator, please email ilab-support@agilent.com with their name and email.

Chart strings

Chart strings are the accounts that are used to pay for expenses here at the university. Chart string information is linked directly from the university's finance system to iLab. Chart strings are a

combination of alphanumeric groupings that identify who the chart string belongs to, the five groupings that are used in iLab are below.

Department - 7 numeric characters that identify the school and department that owns the chart string

Project - 8 alphanumeric characters that identify the specific funding source and type

Activity - 2 alphanumeric characters that further divides the project

Segment - Up to 8 alphanumeric characters that identifies the person the chart string is associated with, if any

Initiative - 5 numeric characters that further identify the project

Using sponsored projects in iLab (GG, IN, or PG)

Sponsored projects should automatically populate into your iLab account and if they don't, it means they haven't yet been created, budgeted, or mapped to you. GG projects are funded by government grants, IN projects by industry grants, and PG projects are funded by private grants. Your first step should be contacting your financial administrator to confirm that the chart string is active, budgeted, and mapped to you. If your financial administrators confirms that the chart string should be available to you and you still don't see it, please contact jh3293@cumc.columbia.edu to troubleshoot the issue and CC your financial administrator and ilab-support@agilent.com. The most common issue is that the chart string has not been budgeted or is not mapped to the PI that believes they should have access to it.

Please find information specific to IN projects here > [Access to IN Chartstrings in iLab \(Updated 3/26/2019\)](#) <.

Using non-sponsored projects in iLab (EN, GT, PC, or UR)

To gain access to non-sponsored projects, please create a ticket using iLab support (ilab-support@agilent.com), CC jh3293@cumc.columbia.edu, your financial administrator and provide the following information: PI's name; Project|Activity|Segment|Department|Initiative; and who in the lab needs access to the project. EN projects are funded by endowments, GT projects are funded by gifts to the University, PC projects are related to patient care, and UR projects are funded by the department or school. We are using the iLab ticketing system to track these requests which are monitored by the P&S Office for Research.

Additional help

Detailed instructions are also available on the [iLab Help Site](#). For any questions not addressed in the Help Site, click on the "HELP" link in the upper right hand corner of the iLab website after logging in or contact ilab-support@agilent.com.