Managing Labs within iLab

1. Navigate to My Groups

Core Facilities Ny Core Ny Reservations	Hao, Sijie (UMD) L	ab
ew Requests ew Funds voices Reporting	Lab-wide approval sett	ings
Aanage Groups Licgnaa y care isab Admin (UMD) Lab Isab Admin (UMD) Lab arthage Orders	Default auto-approval threshold Cost overage buffer save approval settings	
	Lab members and setti	Auto An
	Sille Han	Lab defa
	Kahliya Robinson	Lab defa
	Name Sile Hao Kahliya Robinson	

2. You will automatically land on the Members tab

Editing Lab-Wide Approval and Members

Grimes, Isaias	(UMD) Lab								
				1	Membership Requests & KFS Accounts	Members (10)	Budgets	Bulletin board (0)	Group Settin
Lab-wide approva	l settings 💶								
Click the pencil icon next	to the person below whom you would like to mak	e the financial approver.							
Default auto-approval thres	nold	s 0.0							
Cost overage buffer		\$ 100							
save approval settings									
Lab members and	settings 🕐								
Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date 🥹	End Date 6			
Isaias Grimes	Lab default (\$0.00)		pi.isaias.grimes@ilabx.com					&.∕×	
Christophe Thiel	Lab default (\$0.00)		manager.christophe.thiel@ilabx.com					D \$ /	×
Cletus Windler	Lab default (\$0.00)		member.cletus.windler@ilabx.com					& 🖉 🗙	
Dawson Boyle	Lab default (\$0.00)		member.dawson.boyle@ilabx.com					& 🖉 🛪	
Lea Kunze	Lab default (\$0.00)		member.lea.kunze@ilabx.com					& 🖉 🗙	
Mary Bartoletti	Lab default (\$0.00)		member.mary.bartoletti@ilabx.com					& / ×	
Rosa Durgan	Lab default (\$0.00)		member.rosa.durgan@ilabx.com					& / ×	
Sallie Bahringer	Lab default (\$0.00)		member.sallie.bahringer@ilabx.com					& / ×	
Tanner Feil	Lab default (\$0.00)		member.tanner.feil@ilabx.com					& ∕ ×	
Valentin Robel	Lab default (\$0.00)		member.valentin.robel@ilabx.com					& / ×	
🔾 add new user 🔍 li	nk existing user								

- a. PIs and Lab Manager are able to edit the Lab-wide approval settings
 - I. This is a pre-approval amount. If a user from the lab makes a request that goes above the amount, the request will need your approval.
 - II. The amount defaults to the UMD institutional setting.
- b. PIs and Lab Manager can edit the Lab members and settings
 - I. Click the yellow pencil to edit a member's settings

Lab members	and settings						
Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date 😣	End Date 9	
Isaias Grimes	Lab default (\$0.00)		pi.isaias.grimes@ilabx.com				& / ×
Christophe Thiel	Lab default (\$0.00)	2	manager.christophe.thiel@ilabx.com				0\$1×
Cletus Windler	1	Lvit Member Can order?	member cletus windler@8		3	4	save cancel

- II. You can edit the members auto approval amount
- III. Click the Lvl drop down menu
 - 1. This is where you can designate the member as a PI, Manager, or Member
 - If the person is a Financial Contact that should have access to KFS and spending information, you can check the box next to *Financial Contact* and a \$ icon will appear once you save
- IV. Click Save

Managing Membership Requests and Account Codes

Grimes, Isaias (UMD) Lab									
					Memb	ership Requests & KFS Accounts	Members (10)	Budgets Bull	lletin board (0)	Group Settings
Membership Requests										
Manage KFS Accounts	2									
► Customize KFS Account Grid				KFS	Acccount Grid					
Click on the check boxes to change fur	nding assignments in real time. A green highlight indicat	ies a saved change.								
Filter KFS Account numbers			1							
Name	Default KFS Account	1-11111	1-12347	1-234562	1-234567	1-345678	2-23	14567	2.3	4567
Isaias Grimes	None	×					(3		
Christophe Thiel	None	×	×		×		1			
Cletus Windler	None	×		0	8	8				8
Dawson Boyle	None	8	8		×					0

1. Manage KFS Accounts will show you your fund grid with a list of members. Check/Uncheck the check box to assign/unassign a KFS Account to a lab member.