

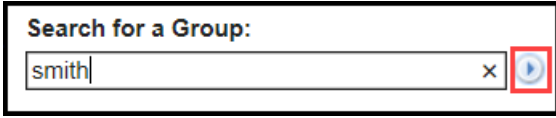
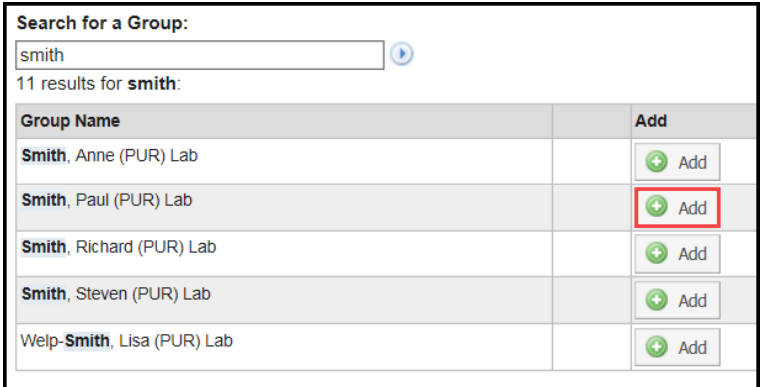



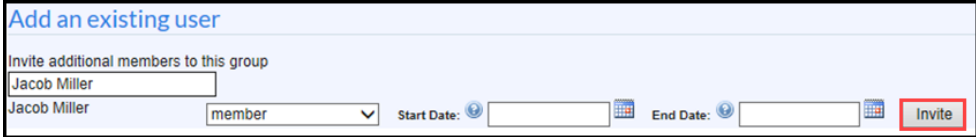
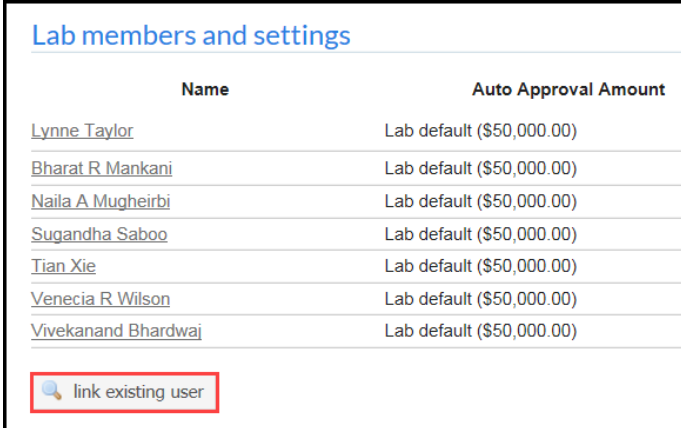


This document outlines the steps to maintain settings for PIs and their users, including: PI assignment to a Department, manual assignment of a user to a PI, adding PI delegate or financial manager, setting thresholds, and setting user expiration dates.

Access Department and PI													
<p>Click my departments.</p>													
<p>Find desired department listing and click view.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> Industrial and Physical Pharmacy </td> <td style="width: 30%; padding: 5px;"> Park, Kinam (PUR) Lab Taylor, Lynne (PUR) Lab Yeo, Yoon (PUR) Lab Li, Tonglei (PUR) Lab Topp, Elizabeth (PUR) Lab Zhou, Qi (PUR) Lab Chadwick, Keith (PUR) Lab Byrn, Stephen (PUR) Lab Galinsky, Raymond (PUR) Lab Pinal, Rodolfo (PUR) Lab Knipp, Gregory (PUR) Lab Morris, Kenneth (PUR) Lab Reklaitis, Gintaras (PUR) Lab Smith, Daniel (PUR) Lab Wassgren, Carl (PUR) Lab </td> <td style="width: 20%; padding: 5px;"> Cathy Skidmore Crystal Rice Cynthia Divan Eric Francis Jacqueline Ward </td> <td style="width: 10%; padding: 5px; text-align: center;"> view </td> </tr> </table>	Industrial and Physical Pharmacy	Park, Kinam (PUR) Lab Taylor, Lynne (PUR) Lab Yeo, Yoon (PUR) Lab Li, Tonglei (PUR) Lab Topp, Elizabeth (PUR) Lab Zhou, Qi (PUR) Lab Chadwick, Keith (PUR) Lab Byrn, Stephen (PUR) Lab Galinsky, Raymond (PUR) Lab Pinal, Rodolfo (PUR) Lab Knipp, Gregory (PUR) Lab Morris, Kenneth (PUR) Lab Reklaitis, Gintaras (PUR) Lab Smith, Daniel (PUR) Lab Wassgren, Carl (PUR) Lab	Cathy Skidmore Crystal Rice Cynthia Divan Eric Francis Jacqueline Ward	view								
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<p>Enter User last name, search automatically begins.</p> <p>Click desired user name to add.</p> <p>NOTE: If the user has not used iLab, they will not be found in the search.</p>	
<p>Click Invite to add user.</p>	
Add PI Delegate or Financial Manager	
<p>Adding a delegate or a financial manager to a PI lab allows someone other than the PI to act on behalf of the PI in the following circumstances:</p> <ul style="list-style-type: none"> Approve membership requests. Assign user thresholds. Approve charges that exceed user thresholds. Assign accounts to users. 	
<p>Click link existing user and add delegate/financial manager.</p>	

Enter **User last name**, search automatically begins.

Click desired **user name** to add.

NOTE: If the user has not used iLab, they will not be found in the search.

Add an existing user

Invite additional members to this

jones x

[Timothy Jones](#)

[Owen Jones](#)

[Blake Jones](#)

[Trenton Jones](#)

[Kellie Jones Weddle](#)

[James Jones](#)

[Yava Jones-Hall](#)

[Mary Jones](#)



[Robyn Jones](#)

[Taylor Jones](#)

[Jessica R Joneson](#)

[Eric Francis errancis@purdue](#)

Click **pencil icon** to edit membership.

Sheri Fell Lab default (\$500.00) fell@purdue.edu  

From **ERP ID** drop-down, select **Manager**.

Name	Auto Approval Amount	ERP ID
Sheri Fell	<input type="text"/>	Member Lvl: Manager Principal Investigator Can order? <input type="checkbox"/> Core Financial Contact: <input type="checkbox"/>

Click **Save**.

Set Spending Threshold – Lab Level

Setting the spending threshold at the lab level will apply the threshold to both the PI and all users listed in the PIs lab.

NOTE: The threshold is a transactional threshold and should only be used to manage limits on single transactions. The threshold does not cumulate total spend and is not an account management tool.

Click **PI Name** under **Group Name** column to see PI details.

Groups Members Settings

Group Name	Approval Amount	Primary Contact	Actions
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Topp, Elizabeth (PUR) Lab	\$50,000.00		✘
Zhou, Qi (PUR) Lab	\$50,000.00		✘

Enter new **threshold dollar amount**.

Click **save approval settings**.

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

\$ 50000.0

Cost overage buffer

\$ 100

save approval settings

Set Spending Threshold – User Level

Setting the spending threshold at the user level will apply the threshold to only the selected user.

NOTE: The threshold is a transactional threshold and should only be used to manage limits on single transactions. The threshold does not cumulate total spend and is not an account management tool.

Click **PI Name** under **Group Name** column to see PI details.

Groups
Members
Settings

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Find user and click to edit.

Lab members and settings

Name	Auto Approval Amount	Actions
Lynne Taylor	Lab default (\$50,000.00)	
Bharat R Mankani	Lab default (\$50,000.00)	
Bin Tian	Lab default (\$50,000.00)	

Enter new **threshold dollar amount**.
































Click **save**.

Name	Auto Approval Amount	End Date
Bharat R Mankani		<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> Lvl: Membr Can order? Core Financ </div> <div style="border: 1px solid #ccc; padding: 2px 5px; width: 80px;"></div> <div style="margin-left: 10px;"> </div> <div style="margin-left: 10px;"> save cancel </div> </div>

Set User Expiration Date

The default setting for a user is to have no set end date.

The end date is useful when the user is assigned to a PI for a limited time to gain access to an account, or if a user will be leaving the institution at a set time and will no longer require access to iLab.

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