

iLab Role Review

Controlling access to Labs, Departments, Centers and Cores

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What is iLab?

iLab At Purdue

iLab is a web-based application adopted by Purdue University to assist in managing research core billings and recharge services provided by the University. The system serves as a central starting point for principal investigators and their lab members to locate research cores and supporting service.

iLab allows users of Purdue research cores to search for and reserve equipment, request services, while allowing the billing for these to be integrated with Purdue's financial systems.



What is in this training?

Additional Training Resources

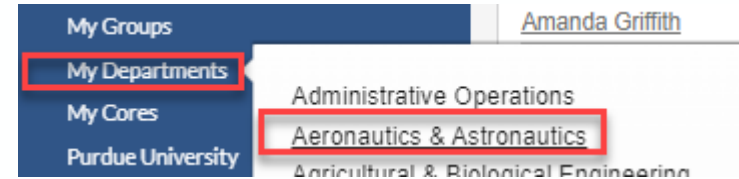
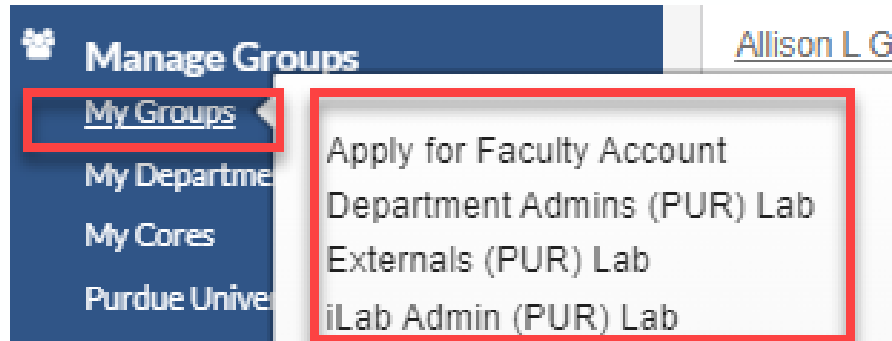


As part of effective administration of iLab Labs, Departments, Centers and Cores, it is important to regularly examine the current list of administrators and members, and ensure that all needed staff are present, and those who are no longer necessary are removed. *This should be done on a semi-annual basis at a minimum.*

This training will go over the steps necessary for each of the different levels (Lab, Department, Center, and Core), and provide guidance on the best way to maintain membership. It is not expected that users viewing this will have admin roles in all the different levels, so if you don't see Centers or other items in your navigation (and are not a Center admin), do not be alarmed.

Lab Membership

Best Practices



Department Name: Aeronautics & Astronautics

| Group Name |
|---|
| Anderson, William (PUR) Lab |
| Heister, Stephen (PUR) Lab |
| Howell, Kathleen (PUR) Lab |
| Longuski, James (PUR) Lab |

To access a particular PI lab, you can either click on My Groups and then select a Lab, or My Departments, choose the desired Department, and then from the list of PI labs (under Groups tab), choose the PI lab you wish to edit.

Lab Membership

Best Practices

It is important to make sure that lab membership is kept as current as possible to ensure timely billing and prevent the need for corrections or stalled billing events. Before expiring a lab member, check for any outstanding charges for that user. This can be done by disabling account strings for the user (under the Membership Requests & Account String tab). If the user has any outstanding requests for that fund, an error dialog will appear (see below). Do not remove the lab member if they have outstanding charges to be billed. If an outstanding reservation is preventing expiration from the lab, please contact the core staff of the responsible core to resolve before proceeding.

Can not remove [redacted] access to Account String - [redacted] because it is the Account String of record for the following services:

Not billed charges on service requests which use this fund: [ADS-PS2-Pheno 2023](#)

Not completed Service Requests which have this fund in their default payment information: [ADS-PS2-Pheno 2023](#)

Please update the Account String for these services / reservations.

Alternatively, you can choose to use another Account String instead for all of them:

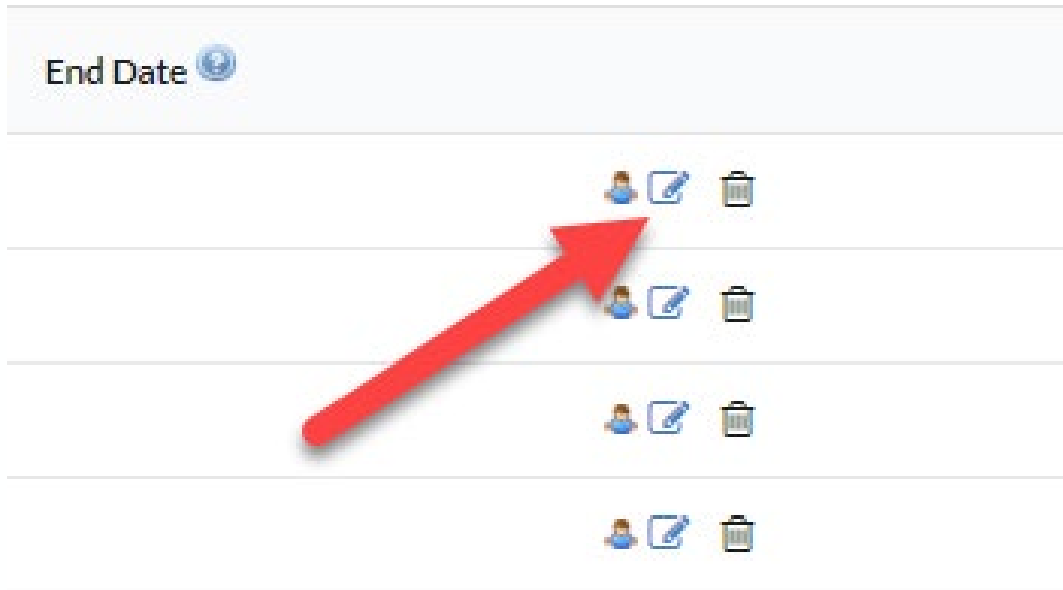
Account String:

Select Account String...

[Update all Service requests / Reservations listed above](#)

Lab Membership

Removing lab members (using expiration dates)



There are two ways to remove a lab member. Firstly, you can expire the user from the lab. This is the suggested method and preserves historical membership data. To do so, from the Members tab in the lab (found under My Groups or from a Department listing) select the edit user membership icon

Lab Membership

Removing lab members (using expiration dates)

Association Information

Permission

member

☐ Can order?

Start Date

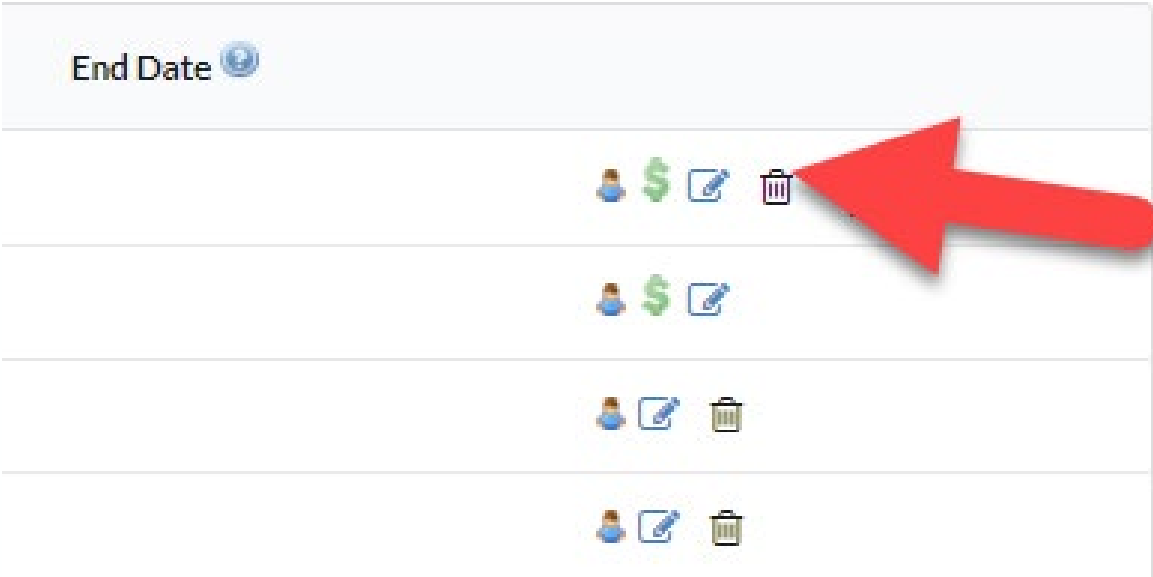
End Date



Then enter an End Date. The lab member will be removed on this date, and then be listed as an Expired Member. It is important to enter as accurate a date as possible, and dates in the past should not be used (as it could result in billing issues)

Lab Membership

Removing lab members (using delete)



Alternatively (under the same Members tab), you can select the trash can icon to remove a user from the lab. The lab member is removed, and no longer listed in the lab (as an Active or Expired Member). This is not suggested, as historical lab membership data can be lost, and should only be used in consultation with ilabhelp@purdue.edu.

Lab Membership

Adding lab members

The screenshot shows the 'Add an existing user' section of the Lab Membership interface. A red arrow labeled '1' points to the 'Link Existing User' button. A red box labeled '2' highlights the search results for 'Hugh A Gardner - hgardne@purdue' and 'Hugh A Gardner'. A red box labeled '3' highlights the 'Invite' button. The interface includes a search bar, a list of users, a dropdown menu for membership level (currently set to 'member'), and date pickers for 'Start Date' and 'End Date'.

To add a new lab member, that member should either [register for an iLab account](#) (see How To Get An iLab Account), or if already a current iLab member, the PI or their department delegate can add the lab member.

To do so, click on Link Existing User, search for the user to add, choose a membership level (discussed more on the next slide) and then click on invite.

Lab Membership

Adding lab members

Add an existing user

Invite additional members to this group

Hugh A Gardner - hgardne@purdue


Hugh A Gardner

member

member

manager

principal_investigator

Start Date: 

- Member is the default level of lab membership and allows the user to be assigned account strings and then reserve equipment or request services as a member of the lab.
- Manager allows a lab member to serve as a financial delegate (able to see and edit lab member charges and invoices), assign account strings, and approve lab membership requests or edit lab membership.
- Principal Investigator allows a secondary PI to be added to the lab with full PI roles (as above, and can also remove or assign Manager roles)

Department Administrators

Deleting department administrators

Department administrators have delegate rights for any PI lab that is included under the department. As such, it is vital to remove department admin access when the administrator leaves the department .

To do so, first select My Departments, choose the department to edit, and then select the Members tab in the department interface. All names listed are current department admins.



Then select the red X icon to remove the user.



Department Administrators

Adding department administrators

To add a new department administrator, use the search function on the Member tab (only current iLab users can be added, and in most cases Lastname only, or Firstname Lastname will successfully return names)

Next, select invite. The default role of financial_manager should not be changed, as there is only one level of access allowed for department administrators.

Manage administrator and staff access

Add additional members from your institution by searching for first and last name:

Hugh A Gardner

Search

1 results for Hugh A Gardner:

Name

Hugh A Gardner

1

Invite

financial_manager

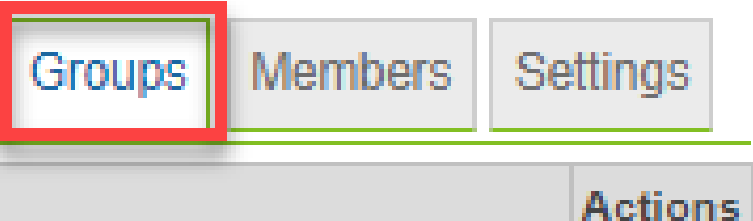
Invite

2

Department Administrators

Adding and removing PI Labs (Groups)

It is also important to make sure the list of PI labs in the Department is kept current. To add or remove PI labs from a Department, first select on the Groups Tab:



A list of all PI labs will be displayed:

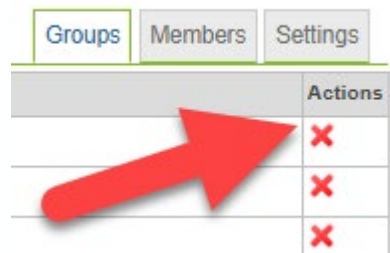
Department Name: Executive VP for Research & Partnerships

| Group Name |
|---|
| Kuhn, Richard (PUR) Lab |
| Rutledge, Charles (PUR) Lab |
| Rochet, Jean-Christophe (PUR) Lab |
| Hirleman, E (PUR) Lab |
| Matthews, Donald (PUR) Lab |

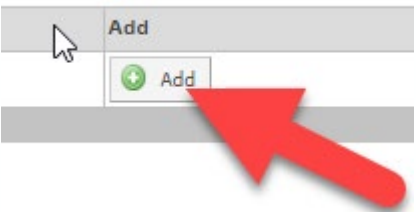
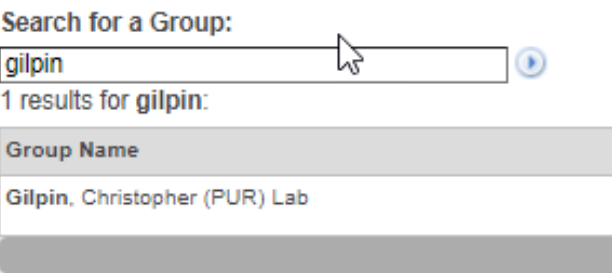
Department Administrators

Adding and removing PI Labs (Groups)

To remove a current PI lab, select the red X under Actions:



To add a new PI lab, use the search function at the bottom of the tab, and then select Add:

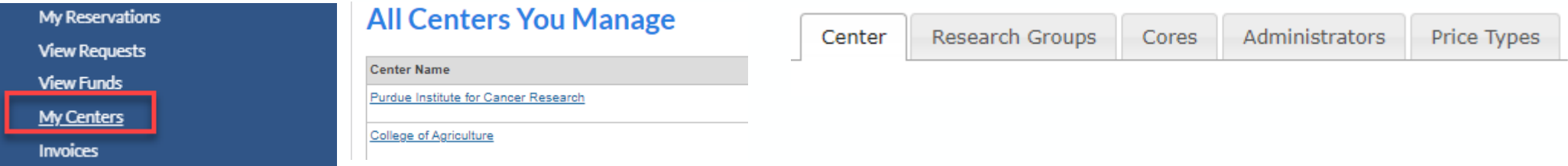


If a PI does not have an iLab presence, contact ilabhelp@purdue.edu for guidance in having that PI lab added.

Center Administrators

Editing Administrator membership

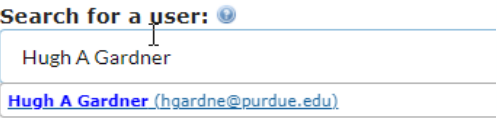
Center Administrators can click My Center (choosing the desired center to edit) to add and remove PI labs in the center, determine which cores can use the center price type and control the center description and any center subsidies.



To remove administrative access, select the Administrators tab. Then, select the red x icon under Actions.



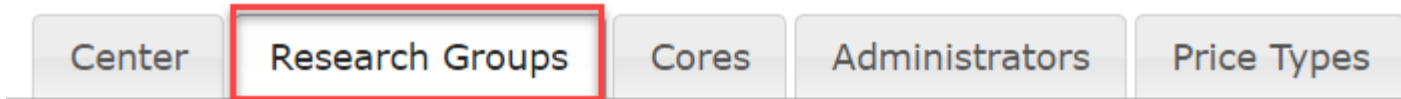
To add a new administrator, on the Administrators tab, search for the new member and then select their name to add.



Center Administrators

Editing PI Lab membership


To edit PI lab membership, select the Research Groups tab for the center you wish to edit (under My Centers)

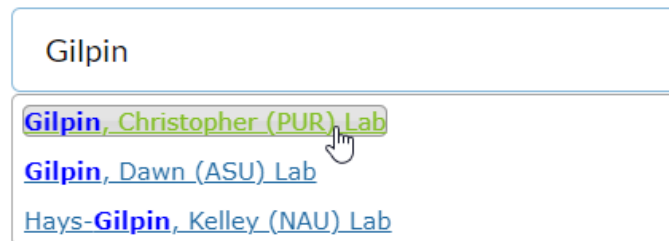


To remove a participating PI lab, select the red x icon under Actions.



To add a new participating PI lab, use the Search for a core (at bottom of screen), enter core name and select to add.

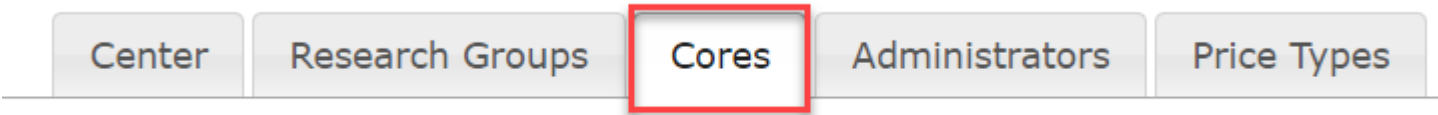
Search for a Group: 

A screenshot of the "Search for a Group" search bar. The search bar contains the text "Gilpin". Below the search bar, there are three search results listed: "Gilpin, Christopher (PUR) Lab", "Gilpin, Dawn (ASU) Lab", and "Hays-Gilpin, Kelley (NAU) Lab". A mouse cursor is hovering over the first result, "Gilpin, Christopher (PUR) Lab".

Center Administrators

Editing Core membership


To edit core membership, select the Cores tab for the center you wish to edit (under My Centers)



To remove a participating core, select the red x icon under Actions.



To add a new participating core, use the Search for a core (at bottom of screen), enter core name and select to add.

Search for a Core: 

Purdue Sandbox

Purdue Sandbox Core A

Purdue Sandbox Core B

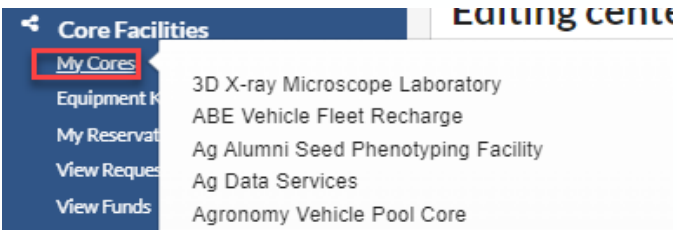
Purdue Sandbox Core C

Core Membership

Editing administrator membership

It is also vital to make sure that core membership is kept as current as possible, as core administrators have extensive abilities to edit core settings and add/delete services and calendars. They should be removed as soon as the employee leaves the core.

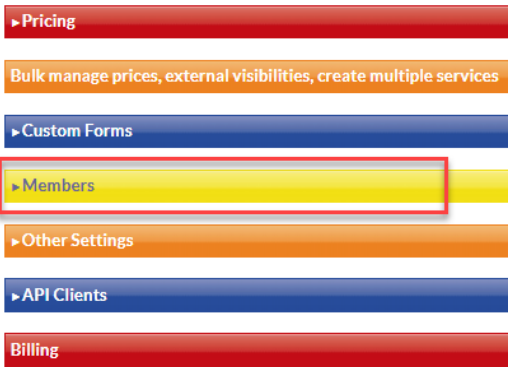
To Add or Remove Core Administrators, first browse to the core (from My Cores select the core to edit)



Then select the Administration tab in the core (this tab will only appear if Administrator roles have been assigned).



Then select the Members tab:



Core Membership

Editing administrator membership

A list of all core administrators will be displayed. There will be several Purdue staff members from the iLab and Agilent support teams present. If you are unsure if you should remove a name, please email ilabhelp@purdue.edu.

Manage administrator and staff access

Add additional members from your institution by searching for first and last name:
Start typing the name of an Search

current managers and employees

| Name |
|--------------------|
| Anna R Augustin |
| Christopher Gilpin |
| Drew M Hallett |
| Hugh A Gardner |
| Melissa DeCandia |

To Add a new administrator, search (by last name, or Firstname Lastname) choose the level of access, and select Invite:

Members

Manage administrator and staff access

Add additional members from your institution by searching for first and last name:
Stevenson Search

5 results for Stevenson:

| Name | Invite |
|---------------------|--|
| Cynthia Stevenson | member Invite |
| Emily Stevenson | member Invite |
| Michael C Stevenson | member Invite |
| Rebecca A Stevenson | member Invite |
| Steven Stevenson | member manager financial_manager admin Invite |

current managers and employees

To remove access, select the red x to the far right of the screen.



How to get help with iLab

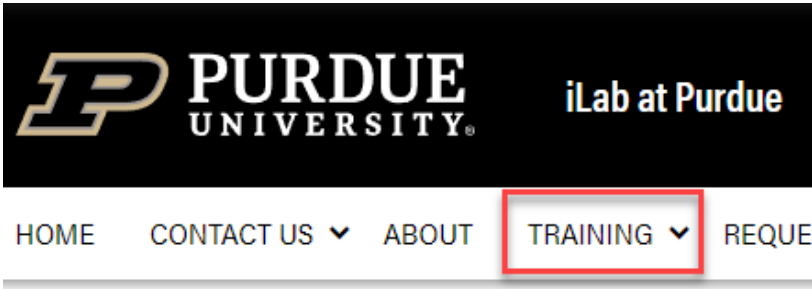
Resources for iLab At Purdue

Campus Email



One of the easiest ways to request help in iLab, is to email ilabhelp@purdue.edu, which will generate a support ticket and alert our team members, who will swiftly respond and provide assistance.

iLab Support site



iLab At Purdue maintains a support site (Purdue.edu/ilab) with a library of Training Quick Reference Cards (QRCs), as well as other iLab related information.

Drop in support sessions



- The iLab At Purdue support team has daily, drop-in support sessions (held using Microsoft Teams). Sessions can be entered by clicking the links on the [iLab support page](#), launching a session during the listed times.

Conclusion

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Summary

This presentation was intended to assist Business Office staff in keeping Lab, Department, Center and Core membership and administrative access up to date for those areas they have been assigned.

Additional Trainings

Additional presentations covering Billing Events and Corrections, and iLab Reporting are also available at purdue.edu/ilab

Similar presentations are available for student and staff lab members, and research/recharge core staff and administrators.

Questions

If you need additional assistance or would like to discuss the wider capabilities of iLab, please reach out to the iLab At Purdue support team at ilabhelp@purdue.edu.

Thank You

iLab At Purdue team, ilabhelp@purdue.edu

