

Notre Dame iLab: Manage Lab Members & Permissions for IU Faculty

Members

Roles: PI, Lab/Group Manager

In the [Members](#) tab you can set financial auto-approval thresholds, add new users and manage current memberships to your group.

- [Layout of Members tab](#)
- [Set approval thresholds](#)
- [Manage memberships](#)

Layout of Members Tab

The layout of the *Members* tab is illustrated below:

The screenshot shows the 'Members (4)' tab selected in a navigation bar. Below the navigation bar, there are two main sections:

- 1 Lab-wide approval settings:** This section includes a note: "Click the pencil icon next to the person below whom you would like to make the financial approver." It features two input fields: "Default auto-approval threshold" set to \$500 and "Cost overage buffer" set to \$100. A "save approval settings" button is located below these fields.
- 2 Lab members and settings:** This section contains a table with the following columns: Name, Auto Approval Amount, ERP ID, Email, Phone, Start Date, and End Date. The table lists four members: Sample PI, Sample Manager, Sample Member 1, and Sample Member 2. Each member row has a set of icons for management (add, edit, delete).

At the bottom of the members section, there are two buttons: "add new user" and "link existing user".

1. **Lab-wide approval settings:** Set the financial [approval thresholds](#) for the group altogether.
2. **Lab member and settings:** [Add/remove users](#) from the group and manage their current memberships.

Set Approval Thresholds


Financial approvals are required from lab administrators when the cost of the service requests submitted by the members exceeds the auto-approval threshold (for more information see [Request Services](#)). You can adjust your lab threshold in the Lab-wide Approval Settings section:

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 \$ 500 

Cost overage buffer \$ 100 

 save approval settings








- **Default auto-approve threshold:** The maximum cost of a service request that can be automatically approved. In the example above, a service request can have a price of up to \$500 to receive auto-approval.
- **Cost overage buffer:** The amount that a service request can go over the original agreed-upon cost before a notification is sent to the lab administrators. In the example above, a service request cost can exceed up to \$100 of the initial price before requiring financial re-approval.

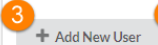
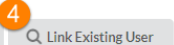
Manage Memberships

The Lab Members and Settings section allows you to add/remove members from the group and manage the existing memberships.

Lab members and settings

Active Members | Expired Members

Name	Auto Approval Amount	ERP ID	Default FS	Email	Phone	Start Date	End Date	
iLab Team	Lab default (\$0.00)		n/a	thellab@ilabx.com				  
Rick Grimes	Lab default (\$0.00)		n/a	jojo21206@live.com	555-555-5555			   

1. Member icons:

- **Role** (person icon): Hover your mouse over this icon to display the role of the user. When blue, this icon is identifying PIs and Members. The yellow version of the icon will represent Lab Managers. See also [Key iLab Terms](#).
- **Financial contact** (dollar icon): This icon indicates that the user is also the lab financial contact and will receive all e-mail notifications requiring the lab administrator's attention. The PI or any additional Manager can still approve pending requests. It also lists the user as a financial contact for Core Staff, so they can be more easily communicated when needed.

- **Edit member** (pencil icon): Allows you to edit the membership settings of any member (see item 2 below).
- **Remove member** (red X icon): Remove the user from the lab. Note that this does not delete their account from the system.

2. **Edit member:** When you click on the 'edit pencil' icon, you will be able to adjust:

- **Email:** iLab communications for this user are sent to this e-mail address. (Changing this will not affect their e-mail used to access iLab).
- **Phone number:** Contact phone number for the user.
- **Auto-approval Amount:** Overrides the lab default [auto-approval threshold](#) and sets different limits per member, at your discretion.
- **Permission:** This drop-down specifies the role of the lab member, i.e. Member, Manager or Principal Investigator (see [Key iLab Terms](#)).
- **Can order?:** This setting applies to iLab's Materials Management module and indicates that this member can order supplies. Typically, not enabled for core facility users.

- **Core Financial Contact?:** Email notifications for the lab are sent to this member.
- **Start Date:** The start date for the user as a member of the lab. If set to a point in the future, the user will not be associated with the lab until the start date. Used to set up lab members in advance, without giving them access until their start date. When left empty, the user will be active immediately.
- **End Date:** The end date for the user as a member of the lab. After that, the user will be removed from the lab and will not be allowed to pay for services using any lab fund. When left empty, the membership will have an indefinite duration.

Note: For expired users, outstanding charges will still follow the normal billing process. To review or reactivate expired memberships, click on the 'Show expired memberships' link (only visible when your lab has any expired memberships).

Lab members and settings

Active Members **Expired Members**

Name	Auto Approval Amount	ERP ID	Default FS	Email	Phone	Start Date	End Date
iLab Team	Lab default (\$0.00)		n/a	theilab@labx.com			
Rick Grimes	Lab default (\$0.00)		n/a	jojo21206@live.com	555-555-5555		

+ Add New User Link Existing User

- **Save/Cancel:** Use this to save or cancel any change made to their membership settings.
3. **Add new user:** When enabled for your institution, create a new user and add them to your lab. Complete the fields as described above under Edit member and click 'Add'. The user will receive a welcome e-mail containing instructions and their login information.

+ Add New User Link Existing User

Create a new user

First name:

Last name:

E-mail:

Institutional e-mail is preferred

Role:

Start Date: End Date:

Add

4. **Link existing user:** Add an existing iLab user to your group. Type their name in the search field, select the user from the search results, adjust their role, start and end date fields, when applicable, and click 'Invite'.

Link Existing User

Add an existing user

Invite additional members to this group

iLab Team - theilab@ilabx.com

iLab Team member Start Date: End Date: Invite