

# *iLab For Principal Investigators*

Usage and basic operations

Last updated 5/22/2024



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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.



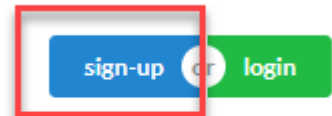
# How to get a Faculty iLab account

## Requesting during sign-up (Option 1)

The process of adding new Faculty users to iLab will depend on whether the faculty member has sponsored funds assigned to them or not. All Faculty users with sponsored funds are automatically added on a nightly basis, without any request being needed. The Faculty member can login to iLab with their Purdue credentials.

Faculty members without sponsored funds are not automatically added, but are instead created by request, with two options.

Option 1, is for the Faculty Member to signup for an account (choosing Signup on the [login page](#)); and then choose “Apply For Faculty Account” as the PI/Group:



**iLab Account Registration**

Hello Tiffany LB Weatherford,

Welcome to iLab! Please choose your PI or group to get started!

PI/Group: ★

First Name: ★

Last Name: ★

Email: ★

Phone number: ★

# *How to get a Faculty iLab account*

## Requesting by support ticket submission (Option 2)

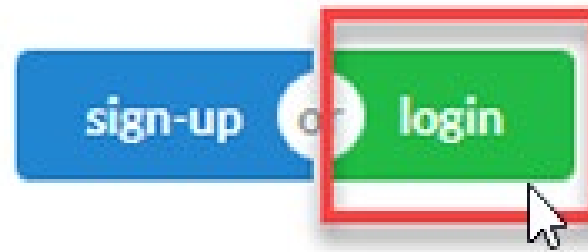
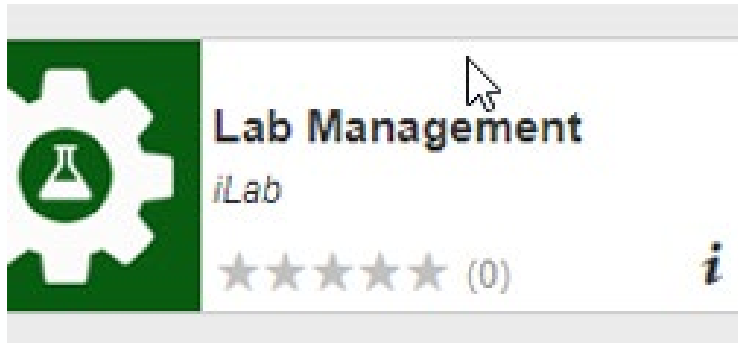
Campus iLab support will approve this request, and then submit a further request for a lab to be created. Once The lab has been created, Campus iLab support will then contact the faculty member when the lab is created and provide additional directions to contact their department business office to pull the newly created lab into the department and assign account strings.

Option 2, is for the faculty member or their business office to upload a secure document to Purdue Box ([select here](#))

Then, the faculty member or their business office needs to submit a support ticket to [ilabhelp@purdue.edu](mailto:ilabhelp@purdue.edu) requesting a new lab to be created.

Campus iLab support will then submit a further request for a lab to be created. Once the lab has been created, Campus iLab support will then contact the faculty member when the lab is created and provide additional directions to contact their department business office to pull the newly created lab into the department and assign account strings.

# How to Login to iLab



## Purdue Login

Career Account Username

Password

[Need help?](#)

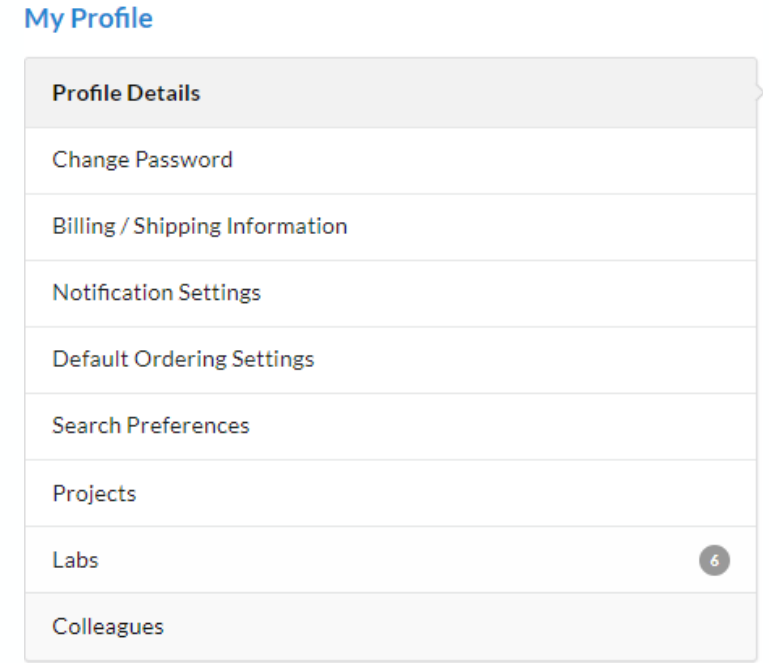
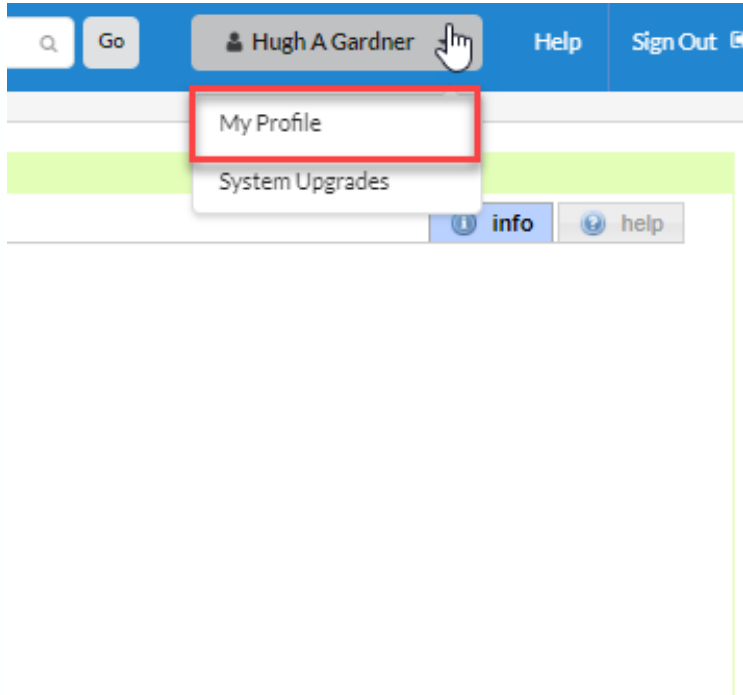
**Note:** Unauthorized access or misuse of computer resources or disclosure of sensitive information may result in disciplinary or legal action. [Read Purdue's Acceptable Use Policy.](#)

1. Go to [purdue.ilabsolutions.com](http://purdue.ilabsolutions.com) or select the Lab Management tile on the One Campus Portal.

2. Click Login

3. Authenticate with your Boilerkey password

# Changing iLab Profile Settings



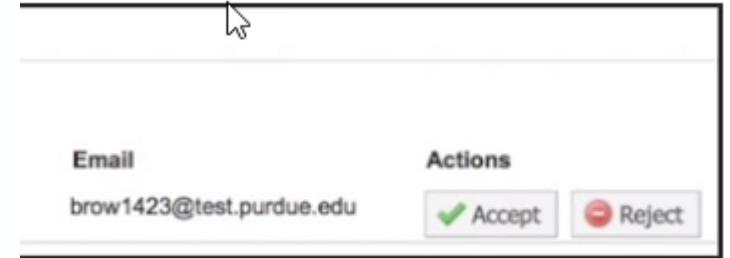
1. Click on the dropdown by your name, selecting My Profile.

2. Click edit. Only a Purdue email or email alias should be used for Email (unless user is External)

3. These additional settings should not be edited as they are not in use/enabled for editing.

# Approve Lab Membership

How to approve student or staff additions to Principal Investigator labs (1 of 1)



To check for an approve lab membership request, first click on My Labs in the left navigation and choose a lab for which you are the PI (Principal Investigator), or have admin rights in.

If there are pending requests, the Membership Requests & Account Strings tab will have a red circle with a number indicating how many pending requests there are.

For each request, you can click **Accept** to allow that student or staff member to join the lab or **Reject** to clear the request.



# Assigning Account Strings

How to give student or staff lab members access to account strings (1 of 2)



To give access to account strings in a PI (Principal Investigator) lab, first click on the Membership Requests & Account Strings tab in the lab interface.

**Manage Account Strings**

Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

Display 10 members per page Search by member name:

Name	Default Account String	10010000-3091003000-7231231239	10010000-4004008000-6200001682 Presidents Council	21010000-8000011257 671 1520-4805	21010000-8000034034 Walther Oncology Physical Sci
Marietta Harrison	None	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gwen Sanders	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Randy Morsel	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Showing 1 to 3 of 3 member(s)

A list of all current account strings will appear, with a blue checkmark indicating access. Click an empty white box to create a blue checkmark, indicating allowed use. To remove access to an account, click the blue checkmark, and it will show as an empty white box again.


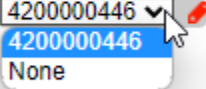
**Note:** If your lab is in a Department in iLab, your business office staff can perform these actions as your delegates.

# Assigning Account Strings

How to give student or staff lab members access to account strings (2 of 2)

Filter Account String numbers

Filter Members

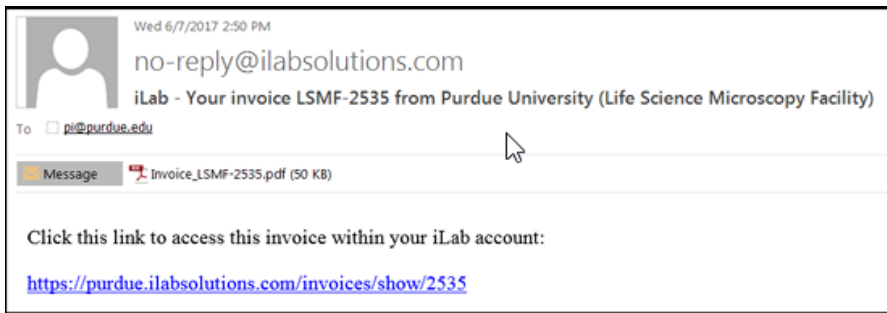
Name	Default Account String
Christopher Gilpin	<input type="text" value="4200000446"/>   4200000446 None
Dale Purcell	None
Hugh A Gardner	None

You can also assign a Default Account String for the lab member. This account string will be selected by default when they make equipment reservations, or request services. This is highly recommended if most of this lab member’s charges will be focused on one fund, as it will reduce the chance of improper charge allocation, as well as streamlining the process of reserving/requesting.

# Reviewing Invoices

Steps to review invoices for lab members

Once a billing event has been created by a research/recharge facility, the Invoice Owner/Financial Contact (in most cases the PI (Principal Investigator) of the lab will be emailed (using the defaults email on record). The link in the email will open the invoice for review:



Invoice No: LSMF-2535  
 Invoice Date: May 03, 2023  
 Lab: [Redacted]

From: Evaluation & Learning Research Center (ELRC) To: Bill [Redacted] (PUR) Lab [Redacted]

[show additional contacts](#)

<b>Invoice Total</b>	<b>\$40,863.30</b>
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**⚠ This invoice has not been approved by a financial administrator.**

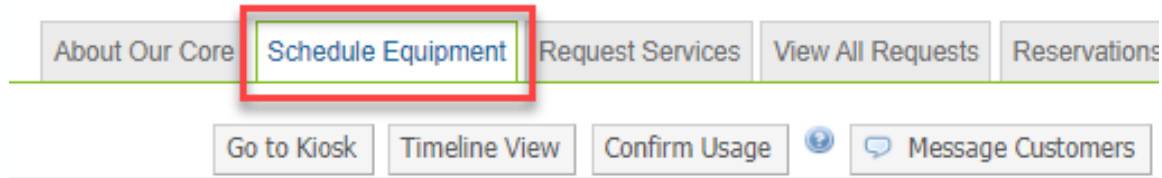
DATE	ITEM DESCRIPTION	PMT#	QTY	PPU	STATUS	TOTAL
<b>Request: E&amp;LRC(ELRC)-WB-2 Start: December 12, 2019 Owner: V [Redacted]</b>						
(46363929) April 30, 2023 (0116301772)	Service	F.90002054.0 2.010	95.9	\$67.00/ea	Completed	\$6,425.30
Actual cost: \$110,883.66		Projected cost: \$51,004.00		Invoice cost: \$6,425.30		
<b>Request: E&amp;LRC(ELRC)-WB-18 Start: March 06, 2020 Owner: V [Redacted]</b>						
(46363933) April 30, 2023 (0116301772)	Service	F.90002054.0 2.035- 46010000--	280.0	\$67.00/ea	Completed	\$18,760.00
Actual cost: \$323,074.00		Projected cost: \$67,000.00		Invoice cost: \$18,760.00		
<b>Request: E&amp;LRC(ELRC)-WB-19 Start: April 23, 2020 Owner: V [Redacted]</b>						
(46363940) April 30, 2023 (0116301772)	Service	F.90002054.0 2.036- 46010000--	55.0	\$67.00/ea	Completed	\$3,685.00
Actual cost: \$154,703.00		Projected cost: \$67,000.00		Invoice cost: \$3,685.00		

PIs are requested to review charges for accuracy. Any discrepancies in account assignment or percentage allocations should be communicated to your account manager in your departmental business office.

If there are no errors, no additional action is required. The invoice will auto approve as part of the iLab billing calendar (10 days after the billing event is created and invoices are sent).

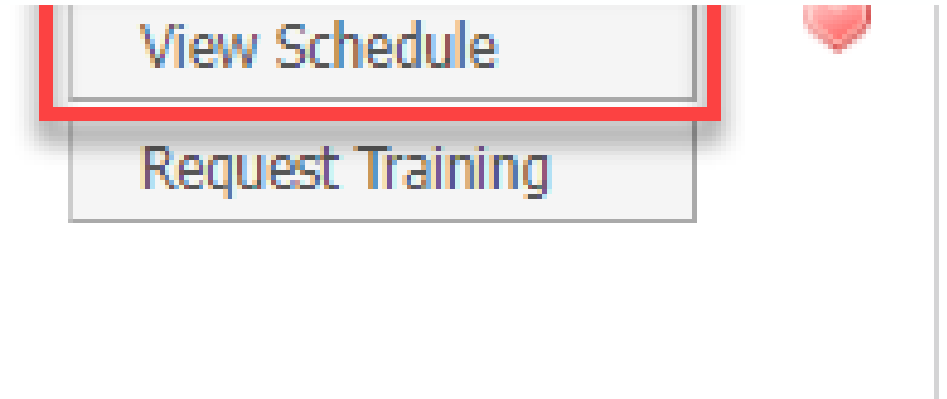
# How to reserve equipment

Scheduling on core calendars (1 of 4)



## Electron Microscopy Center

In the research core you want to use equipment in, click on the Schedule Equipment Tab

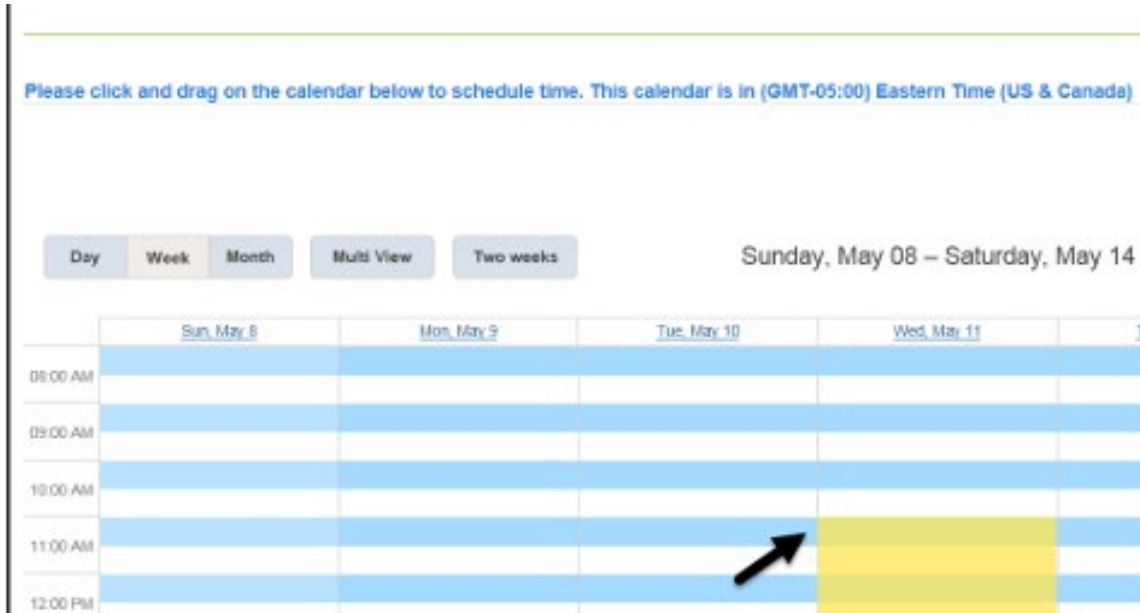


Click **View Schedule** for the piece of equipment you wish to reserve time on.

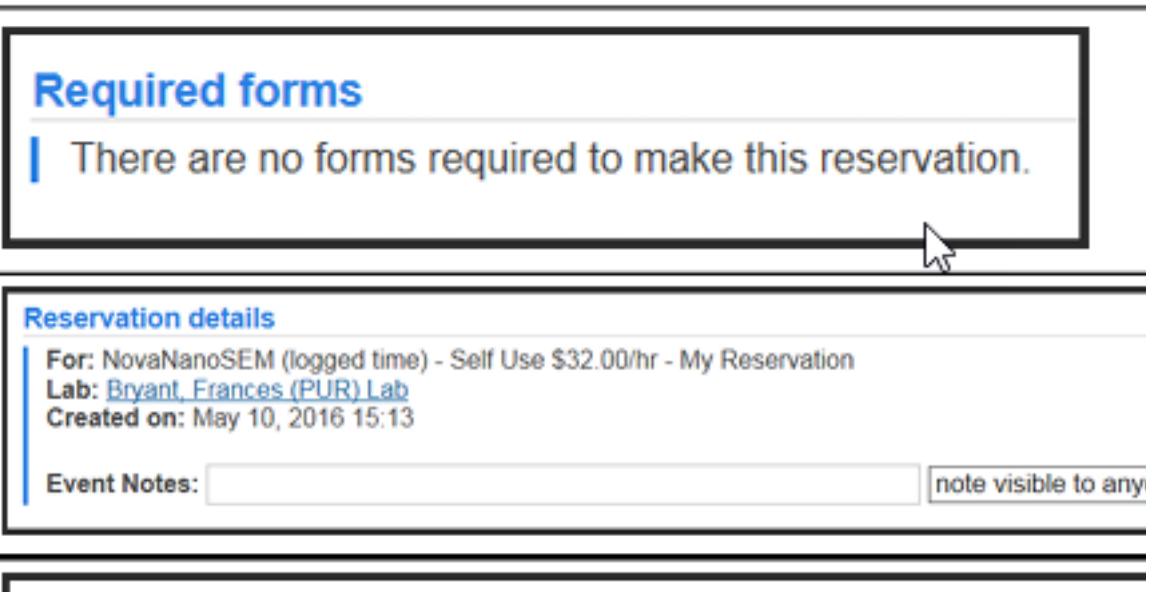
If training on equipment is required, instead click **Request Training**

# How to reserve equipment

Scheduling on core calendars (2 of 4)



Navigate to the desired week, locate day of the week, and click and drag to select the desired time span.



**Required forms** contain any forms required prior to use of the equipment.

Review the **Reservation Details** and Add any Event Notes if the reservation required special instructions.

# How to reserve equipment

Scheduling on core calendars (3 of 4)

Times	
Scheduled:	May 11, 2016 11:00 AM - May 11, 2016 01:00 PM
Logged:	05/11/2016 11:00 AM - 05/11/2016 01:00 PM
Billable:	05/11/2016 11:00 AM - 05/11/2016 01:00 PM

Review **Times** of reservation

Use and cost of reservation	
May 11 '16 11:00 - 13:00	Self Use \$32.00/hr
Total: \$64.0 (2.0 hours)	

Review **Use and cost of reservation**

Payment information:	
Please enter the Account String	
%	Account String
1 100.0	%21010000-8000000109 501 1063-9005 (Expires on December 31, 2075)
100.0%	total allocated
split charge	

Many users have a default account assignment.

Review **Payment information** to ensure the proper account will be charged for this reservation.

If the account the User intends to charge does not appear, contact your home Business Office

# How to reserve equipment

## Scheduling on core calendars (4 of 4)

**Payment information:**  
Please enter the Account String

	%	Account String
1	50	%21010000-8000000109 501 1063-9005 (Expires on December 31, 2075)
2	50	%21010000-8000001517 500 1063-8000 (Expires on December 31, 2075)

100% total allocated

split charge

To split charges among multiple accounts, click Split Charge and allocate to each account by percentage.

**Note:** Only authorized accounts are displayed, and charges cannot be split to multiple labs.

**Invite additional people to this event by email**

Please enter a comma separated list of valid email addresses

To notify a user in addition to the facility of this reservation, add their email address

Save Reservation Cancel Changes

Delete Reservation

- Click **Save Reservation** to submit
- Click **Cancel Changes** or **Delete Reservation** if you need to start over.

# How to reserve equipment

## Viewing your reservations



Under Core Facilities, click **My Reservations**

A screenshot of a reservation management interface. It is divided into three sections: 'TODAY'S RESERVATIONS', 'FUTURE RESERVATIONS', and 'PAST RESERVATIONS'. Each section has a table with columns for Resource, Scheduled start time, Scheduled end time, and Duration. The 'FUTURE RESERVATIONS' section is currently selected and shows a reservation for 'May'.

TODAY'S RESERVATIONS			
Resource	Scheduled start time	Scheduled end time	Duration
<a href="#">NovaNanoSEM Q</a> - NovaNanoSEM	Thu, 12 at 02:30 PM	Thu, 12 at 03:30 PM	1.0 hrs
FUTURE RESERVATIONS			
May			
Resource	Scheduled start time	Scheduled end time	Duration
<a href="#">NovaNanoSEM Q</a> - NovaNanoSEM	Wed, 18 at 09:30 AM	Wed, 18 at 11:30 AM	2.0 hrs
PAST RESERVATIONS			
May			
Resource	Actual start time	Actual end time	Duration
<a href="#">NovaNanoSEM Q</a> - NovaNanoSEM	Wed, 11 at 11:00 AM	Wed, 11 at 01:00 PM	2.0 hrs
<a href="#">NovaNanoSEM Q</a> - NovaNanoSEM	Tue, 10 at 01:00 PM	Tue, 10 at 04:30 PM	3.5 hrs
<a href="#">NovaNanoSEM Q</a> - NovaNanoSEM	Tue, 10 at 10:00 AM	Tue, 10 at 12:00 PM	2.0 hrs
<a href="#">CM 500 Q</a> - CM 100	Mon, 09 at 09:00 AM	Mon, 09 at 11:30 AM	2.5 hrs

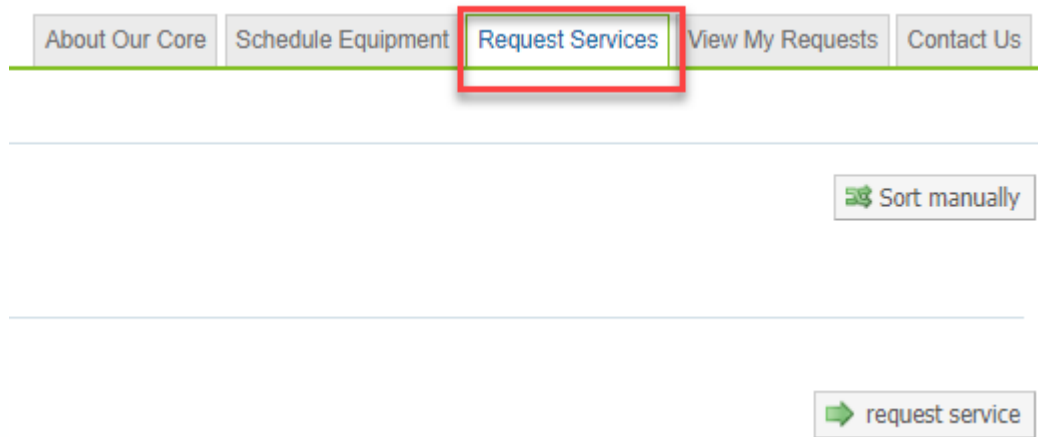
All reservations from the past, current day, and for the future are listed.

Details can be reviewed and if the reservation has not yet been billed, account/payment information can be edited.

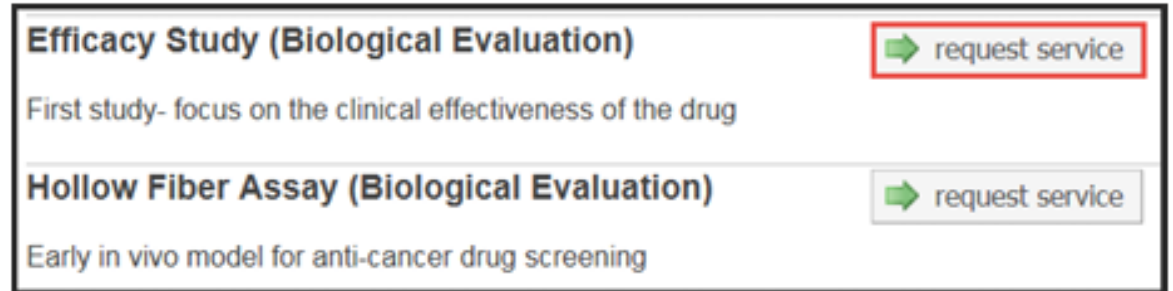


# How to request services

Requesting core services (1 of 3)



On the core landing page, click on the Request Services tab.



Locate the desired service and click the corresponding **request service** button.

# How to request services

Requesting core services (2 of 3)

**Blastocyst Injection of ES Cells**

Request Name:

Customer: Stella Price Lab: Bryant, Frances (PUR) Lab  
Email: stella.price@ilabx.com Phone:

The request is named according to the name of the core and the user submitting the request.

1) Forms and Request Details (see bottom of list to add items to this request)

**Principal Investigator**

Name:

Phone Number:

Campus Address:

email:

Affiliation:  PUCR Member  
 Purdue University Faculty  
 CTSI Member  
 External Request

Alternate Contact:

Alternate Phone Number:

email:

Study Summary:

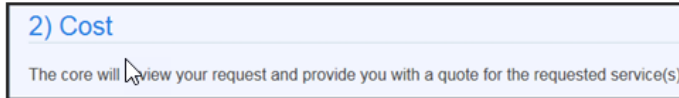
Please list any impending deadlines (consultation, grant application, grant deadline, etc.) related to your project

Any form(s) required from the core are listed.

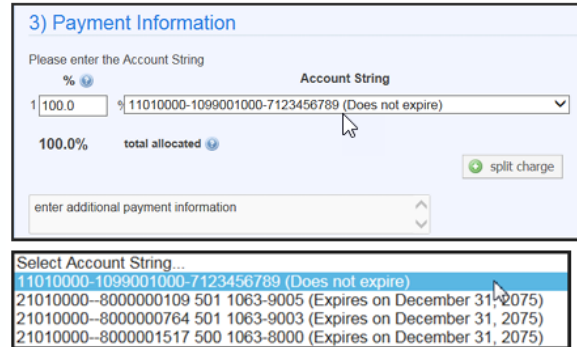
Complete all fields.

# How to request services

## Requesting core services (3 of 3)



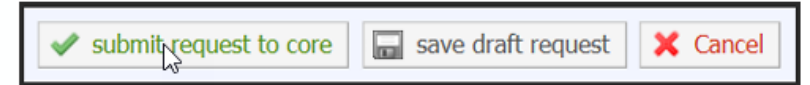
Depending on the service request and core, the cost may display based on information and selections from the form or the core may review the request and return a quote to the user.



Select correct account from drop-down menu to complete **Payment Information**.

To split charges between multiple accounts, click **split charge** and enter the allocations by percentage.

**NOTE:** Only accounts for which the user is authorized will be available for selection.



Click **submit request to core** to submit to lab for review.

If request is not yet complete, click **save draft request** to hold and submit at a later time.

To cancel request, click **Cancel**.

# How to request services

## Viewing Requests (1 of 3)

The screenshot shows a navigation bar with buttons for 'About Our Core', 'Schedule Equipment', 'Request Services', 'View My Requests' (highlighted with a red box), and 'Contact Us'. Below the navigation bar is a 'Reload Active Requests' button. Underneath is a section titled '▼ active requests' which contains a table of requests.

Displaying 4 out of 4 results. (Page 1 of 1)					
date	for	service id	status	cost	
▶ May 17 (Tue 5/17/2016)	Stella Price Eysart, Frances (EURE) Lab	PUCGR-SP-14 Transgenic Mouse	Waiting for Core to Agree	\$0.00 (\$0.00)	
▶ May 05 (Tue 5/5/2016)	Stella Price Eysart, Frances (EURE) Lab	PUCGR-SP-10E Transgenic Mouse	Waiting to Submit to Core	\$0.00 (\$0.00)	
▶ May 05 (Tue 5/5/2016)	Stella Price Eysart, Frances (EURE) Lab	PUCGR-SP-10E Transgenic Mouse	Waiting to Submit to Core	\$0.00 (\$0.00)	
▶ May 05 (Tue 5/5/2016)	Stella Price Eysart, Frances (EURE) Lab	PUCGR-SP-7 Transgenic Mouse	Completed	\$300.03 (\$300.03)	

completed: May 05

Click **View My Requests**

A list of all outstanding service requests is displayed.

The screenshot shows a dropdown menu titled 'status' with the following options: 'Processing', 'Waiting for Core to Agree', 'Waiting to Submit to Core', 'Completed', and 'Waiting for Researcher to Agree'. There are 'Submit' buttons next to 'Waiting to Submit to Core' and 'Waiting for Researcher to Agree'. There are 'Agree' and 'Disagree' buttons at the bottom.

Review status of requests, and take action when needed.

- Waiting to Submit to Core
- Waiting for Core to Agree
- Waiting for Researcher to Agree
- Processing
- Completed

# How to request services

## Viewing Requests (2 of 3)

### Waiting to Submit to Core

A draft version of the request has been saved. Request has not been submitted to the core.

▶ May 18 (May 18 2016)	Stella Price <a href="#">Bryant, Frances (PUR) Lab</a>	PUCCR-SP-[CID] Transgenic Mouse	Waiting to Submit to Core	\$0.00 (\$0.00)
			<input type="button" value="▶ Submit"/>	

### Waiting for Core to Agree

The status of a newly submitted request that requires lab/core approval. The lab manager is reviewing the request and/or preparing a quote or statement of work.

▶ May 17 (May 17 2016)	Stella Price <a href="#">Bryant, Frances (PUR) Lab</a>	PUCCR-SP-14 Transgenic Mouse	Waiting for Core to Agree	\$0.00 (\$0.00)
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### Waiting for Researcher to Agree

Request quote/proposal has been approved by requester and is back to the lab manager for final approval.

▶ May 18 (May 18 2016)	Stella Price <a href="#">Bryant, Frances (PUR) Lab</a>	PUCCR-SP-17 Transgenic Mouse	Waiting for Researcher to Agree	\$2,000.00 (\$0.00)
			<input type="button" value="▶ Agree"/> <input type="button" value="⊖ Disagree"/>	

# How to request services

Viewing Requests (3 of 3)

Processing				
The request is approved and in progress. No action is required.				
▶ May 17 (May 06 2016)	Stella Price <a href="#">Bryant, Frances (PUR) Lab</a>	PUCCR-SP-15 Transgenic Mouse	Processing	\$800.00 (\$842.00)
Completed				
Service is complete. Billing will occur within the next 30 days.				
▶ May 17 (May 17 2016)	Stella Price <a href="#">Bryant, Frances (PUR) Lab</a>	PUCCR-SP-14 Transgenic Mouse	Completed	\$850.00 (\$850.00)
				completed: May 17

# How to get help with iLab

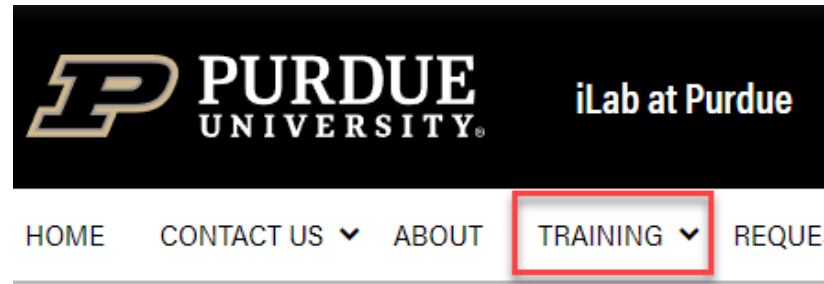
## Resources for iLab At Purdue

### Campus Email



One of the easiest ways to request help in iLab, is to email [ilabhelp@purdue.edu](mailto: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](https://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.

For questions dealing with lab membership, account strings, or additional iLab questions specific to your lab, please contact your departmental business office.

# Conclusion

## Summary

This document presentation was intended to give PIs (Principal Investigators) a concise overview of iLab, and assist them in the task they may need assistance with in using or interacting with iLab.

## Additional Trainings

Additional, similar presentations are available for student and staff lab members, department/center/core financial administrative support, and research 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](mailto:ilabhelp@purdue.edu).



# *Thank You*

iLab At Purdue team, [ilabhelp@purdue.edu](mailto:ilabhelp@purdue.edu)

