

# iLab PI Quick Guide

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CLEMSON  
**LIGHT IMAGING**  
FACILITY



**Agilent**

Trusted Answers

## What is iLab?

iLab Operations Software—now part of the Agilent CrossLab family—is an enterprise web-based management software designed to support operations for centralized labs and shared research resources. The research management tools built into iLab Operations Software enable Clemson Cores and Research Laboratories to:

- Streamline reporting and increase transparency for equipment usage, budgeting, and forecasting
- Increase compliance and create auditable logs of quote approvals, services delivered, and invoicing
- Shorten billing cycles and increase recharge capture
- Raise awareness of available resources

## iLab Gives Control to the PI

- Principal Investigators use iLab:
  - To organize the funds (project ids) they own or have access to
  - To allow approved students or lab members use of those funds for Core facility services
  - To recall requests and charges made in their name for records and reconciliation purposes

## How To Access

Most Clemson PI's had a group arranged for them during the 2020 site build. New Faculty (Spring 2021 or later) may need to register in order to set up their group pages.

- A PI can log in to iLab via:  
<https://clemson.ilab.agilent.com/>



sign-up or login

[About](#)

[Core Facilities](#)

[Search](#)

### Welcome to the Clemson University iLAB Core facility service portal!

The Clemson University Division of Research strives to support faculty and students who continue to push the boundaries of scholarship and discovery at Clemson, a **Carnegie R1 research institution**. Our mission is to enhance Clemson's reputation as a world-class research institution, while promoting a culture of discovery and excellence in a collaborative, diverse, safe and inclusive environment.

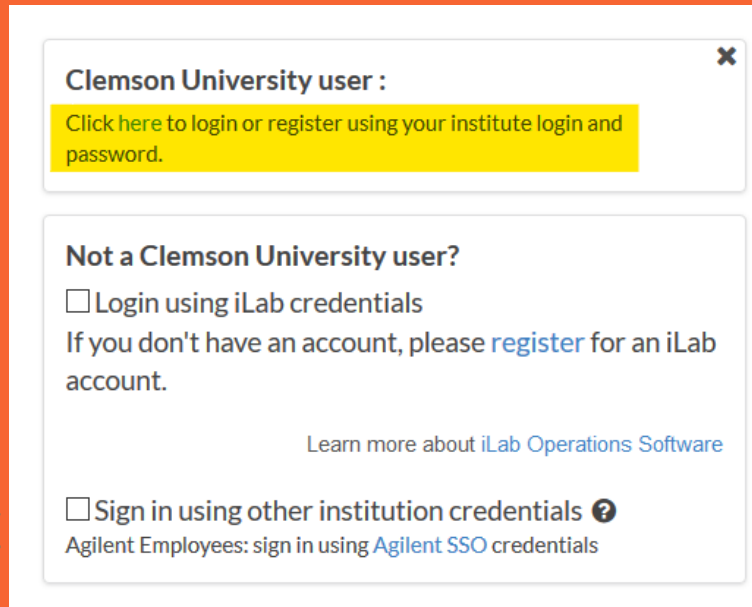
The Division operates four core research facilities that offer world-class equipment and highly trained staff.

- The Office of Animal Resources, which includes the Godley-Snell Research Center and the Aquatics Animal Research Lab, provides high quality veterinary care programs, professional and technical support, education and training, and technologically advanced facilities and equipment for research and teaching activities.
- The Clemson University Electron Microscopy Facility houses some of the world's most advanced scanning and transmission electron microscopes, as well as X-Ray Photoelectron Spectroscopy and Auger Electron Spectroscopy (XPS & AES), and other equipment. The facility is fully equipped with sample prep tools, and has a full-time Hitachi representative on site to ensure equipment is fully functional.
- The Clemson Light Imaging Facility (CLIF) is a multi-user core facility with a number of advanced light microscopes, including a Leica SP8X Multiphoton spectral confocal microscope, and a suite of Nikon microscopes. Additionally, the CLIF features cell sorting equipment, a multi-user specimen preparation laboratory and a dedicated classroom.

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- A PI can log in to iLab via:  
<https://clemson.ilab.agilent.com/>
- Clemson Users log in with their **University Credentials** and Duo two-factor authentication.



**Clemson University user :**

Click [here](#) to login or register using your institute login and password.

**Not a Clemson University user?**

☐ Login using iLab credentials

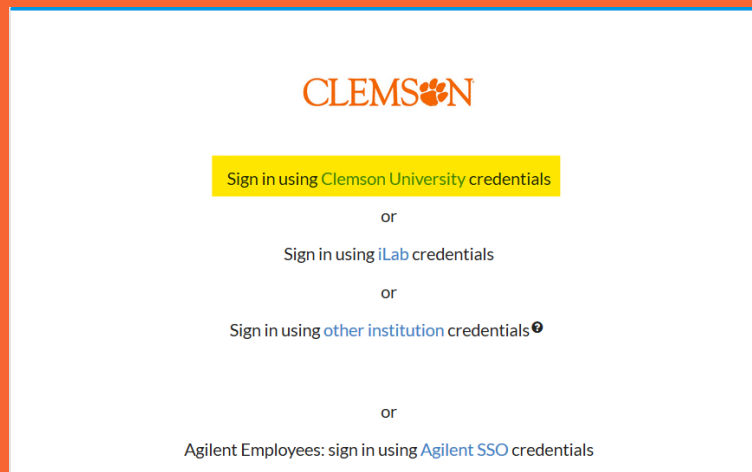
If you don't have an account, please [register](#) for an iLab account.

[Learn more about iLab Operations Software](#)

☐ Sign in using other institution credentials ?

Agilent Employees: sign in using [Agilent SSO](#) credentials

\*Figures depicting two types of login screens



**CLEMSON**

Sign in using [Clemson University](#) credentials

or

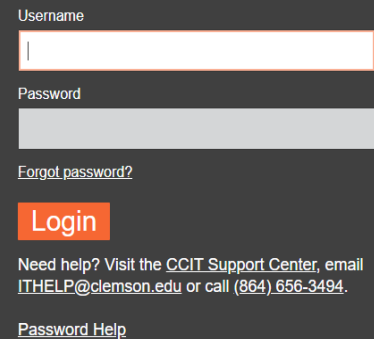
Sign in using [iLab](#) credentials

or

Sign in using [other institution](#) credentials ?

or

Agilent Employees: sign in using [Agilent SSO](#) credentials



Username

Password

[Forgot password?](#)

**Login**

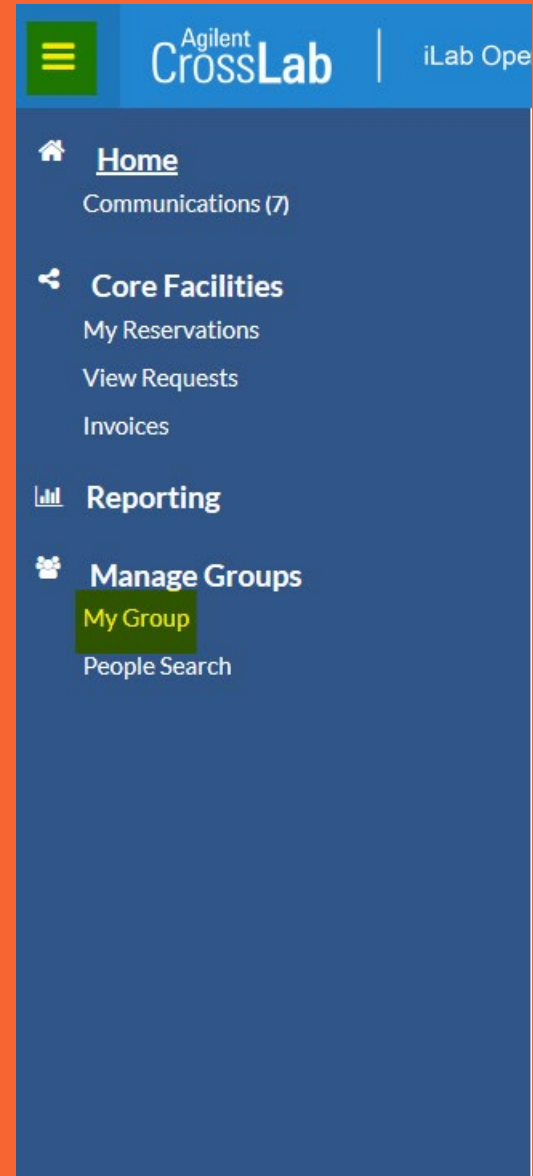
Need help? Visit the [CCIT Support Center](#), email [ITHelp@clemson.edu](mailto:ITHelp@clemson.edu) or call (864) 656-3494.

[Password Help](#)

## How To Access

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- A PI can log in to iLab via:  
<https://clemson.ilab.agilent.com/>
- Clemson Users login with their **University Credentials** and Duo two-factor authentication.
- Once logged in, the PI can find labs they manage by visiting **My Group(s)** under the left dropdown.
- The group will always be called "[PI Last Name], [PI First Name] (Clemson) Lab"



## How To Access

Most Clemson PI's had a group arranged for them during the 2020 site build. New Faculty (Spring 2021 or later) may need to register in order to set up their group pages.

- PI's who do not have an iLab account pre-set will be redirected to registration when they first log in.
- They should select **Admin (Clemson) Lab** under the PI/Group section.
- Site administrators will receive the request to create a Group page in iLab.

**Register for iLab**

Fill out all fields to create a new account. Please note that information entered here is for the iLab service.

\* PI/Group

\* First Name

\* Last Name

\* Email Address

\* Phone Number

[Cancel](#) [Register](#)

### Hello Staff Test11,

Your account activation is currently pending the approval of your membership to the following lab:

- 

We have notified the institutional administrators of your request, and they will be reminded each business day if they have not approved your account. You can send an immediate reminder by clicking the 'Send Reminder' button below.

[Send Reminder to the Designated Approver](#)

If your request is urgent, please click on the button below and we will do our best to follow up with the appropriate individuals to verify your account.

[Request Assistance](#)

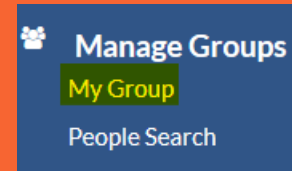
[Back to Login Page](#)



## How To Access

Most Clemson PI's had a group arranged for them during the 2020 site build. New Faculty (Spring 2021 or later) may need to register in order to set up their group pages.

- PI's who do not have an iLab account pre-set will be redirected to registration when they first log in.
- They should select **Admin (Clemson) Lab** under the PI/Group section.
- PI's who can log in but have no personal Lab listed in **My Group(s)** should select **Request Group Access** and choose **Admin (Clemson) Lab**.
- Site administrators will receive the request to create a Group page in iLab.



### Request Group Access

#### Request Group Access

Institution \*

Clemson University

Group \*

Admin (Clemson) Lab

Cancel

Request Access

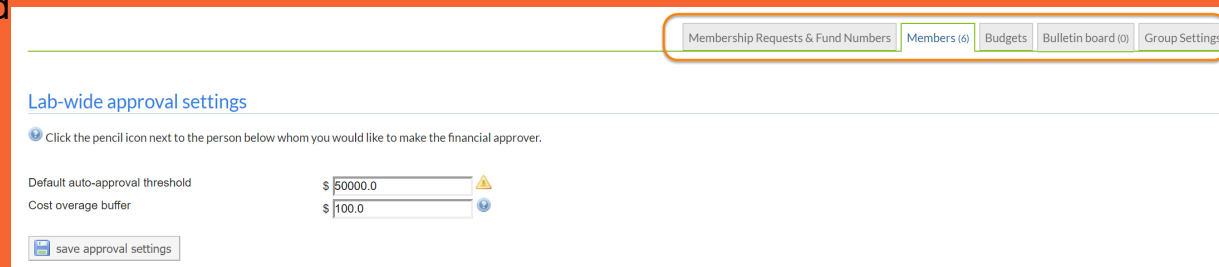


## Managing a Group

The PI Group page is the central hub for Principal Investigator's and designated Lab managers to view and modify settings. The most important screens include:

- The Members tab
- The Membership Requests and Project ID tab

**NO USER** may reserve equipment or request services in iLab without being a member of at least one PI's Group.



The screenshot displays the 'Lab-wide approval settings' section of the iLab interface. At the top, there is a navigation bar with tabs: 'Membership Requests & Fund Numbers', 'Members (4)', 'Budgets', 'Bulletin board (0)', and 'Group Settings'. Below the navigation bar, the 'Lab-wide approval settings' section is visible. It includes a blue link 'Lab-wide approval settings' and a blue circular icon with a pencil. A text instruction reads: 'Click the pencil icon next to the person below whom you would like to make the financial approver.' Below this, there are two input fields: 'Default auto-approval threshold' with a value of '\$ 50000.0' and a yellow warning icon, and 'Cost overage buffer' with a value of '\$ 100.0' and a blue circular icon. At the bottom of the section, there is a button labeled 'save approval settings'.










\*Detailed Information about ALL Group features can be found at:  
[https://help.ilab.agilent.com/en\\_US/36900-managing-your-group](https://help.ilab.agilent.com/en_US/36900-managing-your-group)


## Members Tab


### Lab members and settings

Active Members

Expired Members

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

 Add New User

 Link Existing User

The Members tab allows the PI to manually add/remove members from their group and designate roles.

1. Member icons
2. Edit Members
3. Add New User \*disabled for Clemson
4. Link Existing User

## Members Tab - Editing

Choosing Edit Members allows the PI to:

- Update member contact information
- Set **Auto-Approval Amounts** for individual members so that they cannot request non-equipment services exceeding a preset amount without the PI's knowledge
- Change the Permissions of a User (PI, Manager, Member, Financial Contact)
  - PI's can use this option to designate a **Lab manager** with rights to accept new members and assign funds.
  - Explanation of Roles/Permissions:  
<https://help.ilab.agilent.com/99540-getting-started-with-ilab/261285-key-ilab-terms>

### Edit membership

#### Person Information

Email

Institutional e-mail is preferred

theilab@ilabx.com

Phone number

|

#### Group Information

Auto Approval Amount

\$

#### Association Information

Permission

principal\_investigator ▼

☐ Can order?

☐ Core Financial Contact?

Start Date ⓘ

End Date ⓘ



Cancel

Save

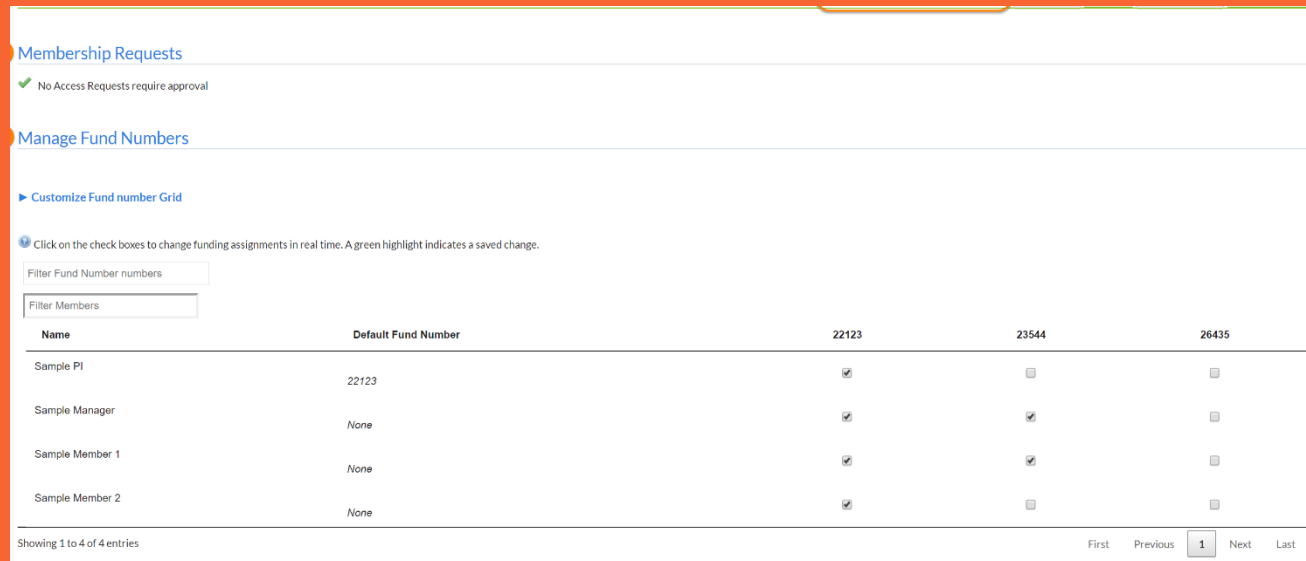
## Membership Requests & Project ID tab

This tab allows the PI to:

- Approve or Reject memberships
- Manage Access to Funds (Project IDs)
- Request additional Funds

Settings in this Tab apply **ONLY** to members of the PI's group. If one PI shares funds with a 2<sup>nd</sup> PI, they have no control over the members that colleague will grant fund access to

<https://help.ilab.agilent.com/36900-managing-your-group/279959-membership-requests-fund-numbers>



The screenshot shows the 'Membership Requests' and 'Manage Fund Numbers' tabs. The 'Manage Fund Numbers' tab is active, displaying a table with columns for Name, Default Fund Number, and three specific fund numbers (22123, 23544, 26435). The table lists four entries: Sample PI, Sample Manager, Sample Member 1, and Sample Member 2. Each entry has a checkbox for each fund number. The 'Sample PI' row has a green highlight under the 22123 column, indicating a saved change. Below the table, there is a pagination bar showing 'Showing 1 to 4 of 4 entries' and navigation links for 'First', 'Previous', '1', 'Next', and 'Last'.

**Membership Requests**

✓ No Access Requests require approval

**Manage Fund Numbers**

▶ Customize Fund number Grid

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

Filter Fund Number numbers

Filter Members

Name	Default Fund Number	22123	23544	26435
Sample PI	22123	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sample Manager	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Member 1	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Member 2	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Showing 1 to 4 of 4 entries

First Previous **1** Next Last

## Approving Members

PI's (not Managers) will receive email notification when a new student or lab member requests access to their group.

PI's and Managers can visit this tab at any time to view pending Membership Requests and approve or reject them.

**(Clemson) Lab**

2

Membership Requests & Project ID


Members (4)



Budgets

Bulletin board (0)

Group Settings

Membership Requests

 Several Access Requests require approval

Date	Name	Email	Actions
 Sep 18 '20	Joe [redacted]	[redacted]	<input checked="" type="checkbox"/> Accept <input checked="" type="checkbox"/> Reject
 Sep 18 '20	Asa [redacted]	[redacted]	<input checked="" type="checkbox"/> Accept <input checked="" type="checkbox"/> Reject

Members **must** then be assigned a fund (Project ID) in order to reserve equipment or request Core services...

## Assigning Project IDs

All lab members will show under the Manage Project ID section of this tab.

- The PI or Lab Manager should click on the appropriate check box to assign a Project ID to a member.
- Otherwise, that member will receive errors when they attempt to schedule billable Core services.

Manage Project ID

► Customize Project ID Grid

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

Filter Project ID numbers

Filter Members

Name	Default Project IDs	20-201	20-201	20-201
Brian	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ezra	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hai	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Most Project IDs that have been budgeted for by Departmental Accounting will be sent to iLab via a nightly fund file and attached to a PI. Project IDs that are not assigned or belong to Another PI **must** be requested....

## Requesting Access to Project IDs

### ▼ Request access to additional Project IDs

🔗 If you don't see a Project IDs that you should have access to, please type it in below. The Fund Owner will receive a notification and approve or deny your request.

Please replace your account code (Box 3 below) with 7359 and select Request.

Fund Code	Program Code	Account	Deptid	Class Fld	Project ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Request"/>					

PI's sometimes find that a fund (Project ID) they believe they have access to does not automatically appear in their group.

- This is most often because that PI was awarded **access** to the fund but is not necessarily the **Owner** of the fund.
- Other occasions include funds classified as "Non-Sponsored" which are sent to iLab without an Owner specified

- iLab receives a nightly fund file via Clemson Peoplesoft. Funds are allocated to the **Named Owner** of the Project before it reaches iLab and must then be shared with Co-PI's or awardees.
- PI's can **make a request** to the owner of fund who will receive email notification to approve/reject access.

**Only** PI's who are listed as the **Owner** of a Project ID will receive access requests. A Lab Manager has no authority to receive, approve, or deny Project ID requests in iLab from a PI outside of the lab group...



## Requesting Access to Project IDs

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🔔 If you don't see a Project IDs that you should have access to, please type it in below. The Fund Owner will receive a notification and approve or deny your request.

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Fund Code	Program Code	Account	Deptid	Class Fld	Project ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Near the bottom of the **Membership Requests & Project IDs** tab is the option to request access to funds that do not appear on the PI's page. A PI **must** type the Full 23 chart string and select **Request**.

The Owner of the account will receive an email notification to approve/reject access and the requesting PI will be notified of their decision.

- XXXX is not sufficient for the Account Code. iLab utilizes a code 7359 (CU Core Facility Fees) for the Project IDs sent from Peoplesoft.
- Department account managers will be able to provide the remainder of a chart string if a PI does not know which account they own.

**Only** PI's who are listed as the **Owner** of a Project ID will receive access requests. A Lab Manager has no authority to receive, approve, or deny Project ID requests in iLab from a PI outside of the lab group...

## Requesting Access to Project IDs

The Owner of the account will receive an email notification to approve/reject access and the requesting PI will be notified of their decision.

The PI will then be able to visit their lab page and verify that the account is present and assigned to themselves or other lab members.

**Subject:** iLab: Your Project IDs access request has been approved.

Hello [REDACTED],

Your request to access Project IDs: [REDACTED] has been approved.

[Visit your lab page to manage your Project ID.](#)

Thanks,  
the [iLab](#) team.

### Manage Project ID

#### ► Customize Project ID Grid

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

 Filter Project ID numbers

 Filter Members

Name	Default Project IDs	20-201 [REDACTED]	20-201 [REDACTED]	20-201 [REDACTED]
Brian [REDACTED]	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ezra [REDACTED]	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hai [REDACTED]	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Other Key Features

PI's can also:

- View a list of the Core Facilities utilizing iLab on Campus
- View all requests that have been made by members of their lab Group
- View all Invoices that have been generated for services charged to their members.
  - Each core should email the PI a copy of new invoices when they are generated.
  - iLab invoices can be approved or disputed by the PI **before** they are sent to Clemson ERP for processing.
  - If the PI does not review and approve the invoice, charges will automatically approve **seven days** from the date it was created.
- Generate Reports based on the usage of members of their Group:



### Home

Communications (7)



### Core Facilities

My Reservations

View Requests

Invoices



### Reporting



### Manage Groups

My Group

People Search

# Useful Links:

## Core Facilities

Aquatic Animal Research Laboratory:

[https://clemson.ilab.agilent.com/service\\_center/show\\_external/5350](https://clemson.ilab.agilent.com/service_center/show_external/5350)

Clemson Light Imaging Facility:

[https://clemson.ilab.agilent.com/service\\_center/show\\_external/5348](https://clemson.ilab.agilent.com/service_center/show_external/5348)

Clemson Electron Microscopy Facility:

[https://clemson.ilab.agilent.com/service\\_center/show\\_external/5349](https://clemson.ilab.agilent.com/service_center/show_external/5349)

Godley-Snell Research Center:

[https://clemson.ilab.agilent.com/service\\_center/show\\_external/5351](https://clemson.ilab.agilent.com/service_center/show_external/5351)

## Other Facilities

South Carolina Bioengineering Center for Regeneration and Formation of Tissues

[https://clemson.ilab.agilent.com/service\\_center/show\\_external/5630](https://clemson.ilab.agilent.com/service_center/show_external/5630)

# Useful Links:

Clemson Division of Research iLab FAQ (Site TBA):

<https://www.clemson.edu/research/division-of-research/>

Clemson iLab Implementation PI Training:

<https://youtu.be/q5HDKLcpcbK>

iLab Help Site (full articles for workflows, training videos, etc.):

<https://ilab.helpjuice.com/35322-getting-started/299372-welcome-to-ilab-help>