iLab PI Quick Guide

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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/

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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.
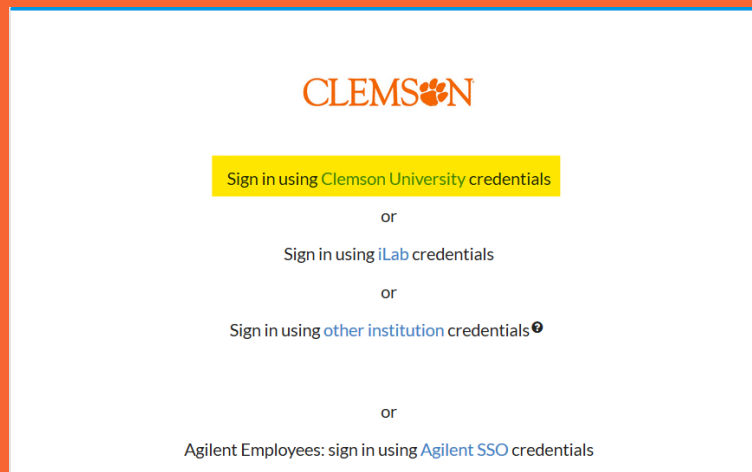
Not a Clemson University user?
☐ Login using iLab credentials
If you don't have an account, please register for an iLab account.

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

CLEMS⬤N

Sign in using Clemson University credentials

or

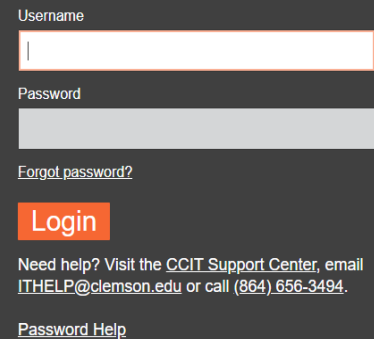Sign in using iLab credentials

or

Sign in using other institution credentials ❓

or

Agilent Employees: sign in using Agilent SSO credentials

CLEMSON
UNIVERSITY

Username

Password

Forgot password?

Login

Need help? Visit the CCIT Support Center, email ITHELP@clemson.edu or call (864) 656-3494.

Password Help

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- 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"
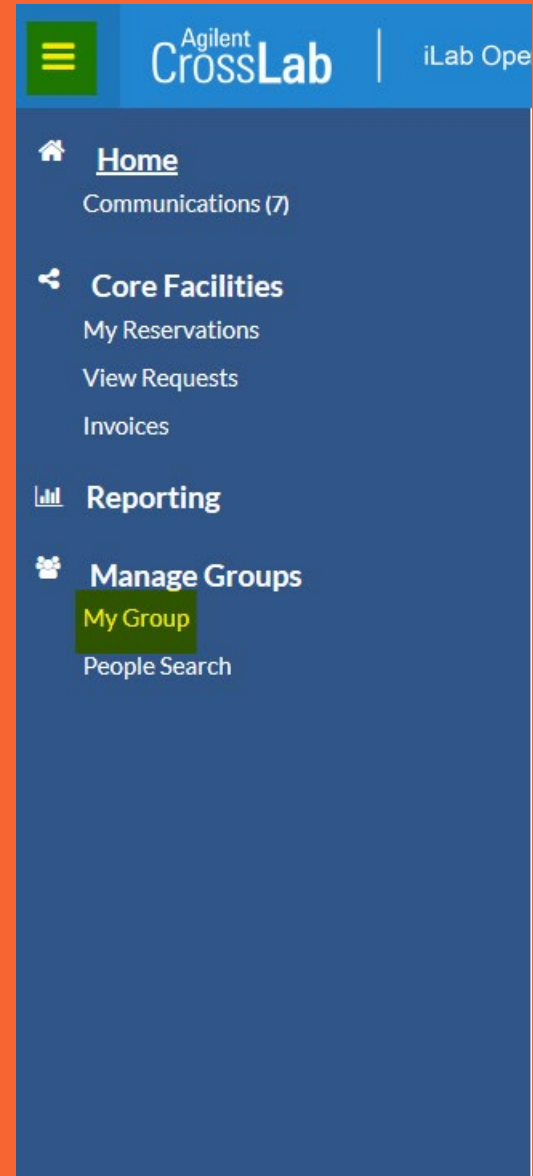
How To Access

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.

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.

Manage Groups
My Group
People Search
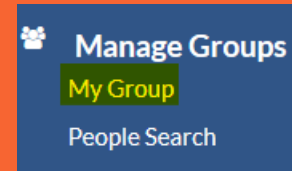
Request Group Access

Request Group Access

Institution *

Clemson University
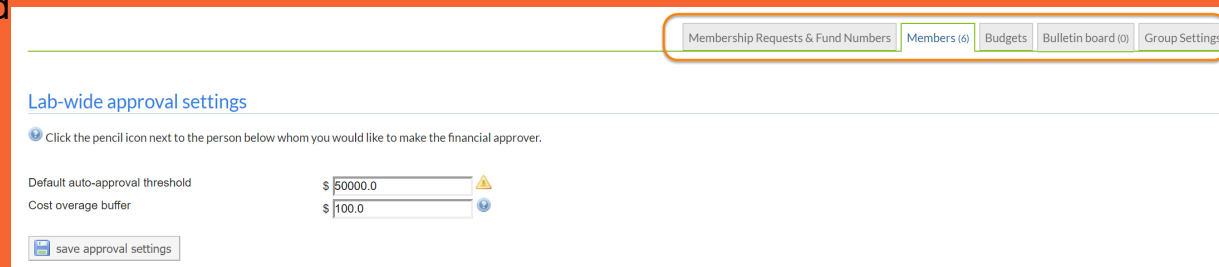
Group *

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.

*Detailed Information about ALL Group features can be found at:
https://help.ilab.agilent.com/en_US/36900-managing-your-group

Members Tab

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
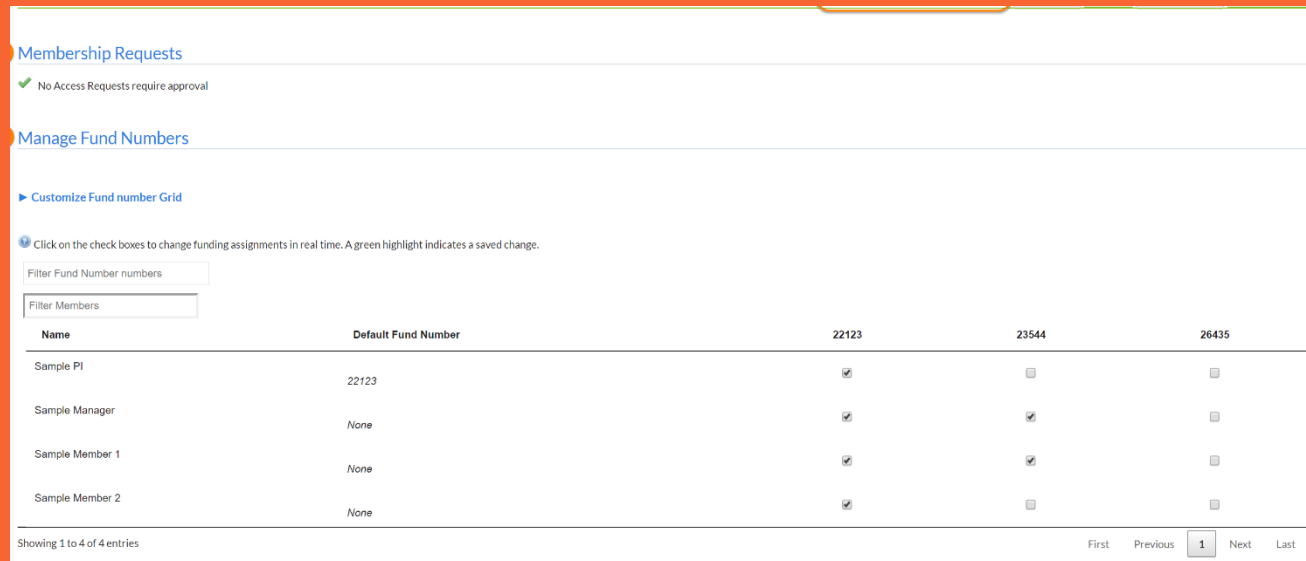
Membership Requests & Project ID tab

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 2nd 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

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.

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.

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

[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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Request

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 ⬛⬛⬛⬛,

Your request to access Project IDs: ⬛⬛⬛⬛ 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⬛	20-201⬛	20-201⬛
Brian ⬛	None	☑	☑	☑
Ezra ⬛	None	☐	☐	☐
Hai ⬛	None	☑	☑	☑

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:

Useful Links:

Core Facilities

Aquatic Animal Research Laboratory:

https://clemson.ilab.agilent.com/service_center/show_external/5350

Clemson Light Imaging Facility:

https://clemson.ilab.agilent.com/service_center/show_external/5348

Clemson Electron Microscopy Facility:

https://clemson.ilab.agilent.com/service_center/show_external/5349

Godley-Snell Research Center:

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

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