

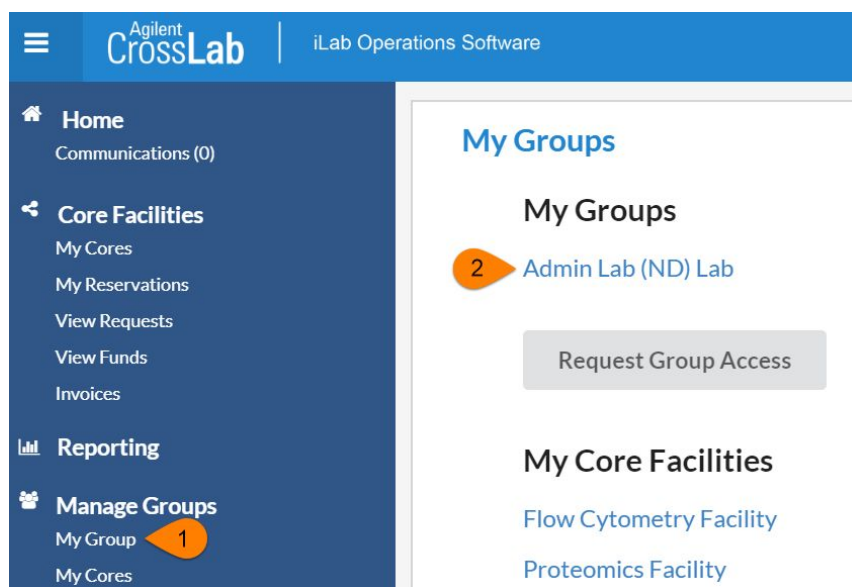
## Manage Research Groups (Labs) & FOPs

Research groups are the PI's lab where their members and FOPs live and are managed.

Through a nightly fund file provided to iLab by Notre Dame, a list of PIs and FOPs are loaded and updated. PIs within this file will have their account and lab created automatically with all FOPs they are an owner of populated in their lab. If a FOP is marked as Non-Sponsored, it will live in the background until it is requested into a lab.

### Accessing your Lab

1. Click 'My Groups' in the left-hand navigation panel to see a list of labs you manage
2. Click the lab name to enter the lab to adjust settings, members, and FOP assignments



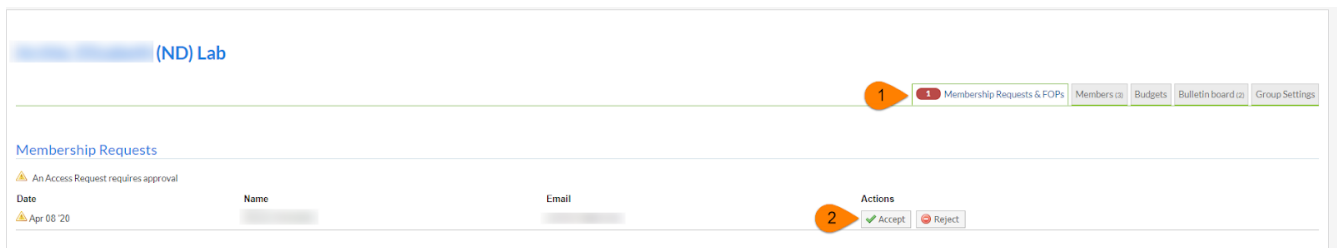
As a Principal Investigator (or, if delegated, a Lab Manager), you have a few new responsibilities to allow your researchers to order services from the cores and make equipment reservations. Specifically,

- Accepting users into your lab
- Assigning FOP(s) to lab members
- Managing lab members
- Approving service requests and reviewing/providing payment information

## Managing Members and FOPs in a Lab

### Accepting a member into your lab

1. Navigate to your lab
2. Click the 'Membership Requests & FOPs' tab
  - a. This will show any pending membership request
3. Approve or reject the membership request
  - a. If a researcher selected the incorrect lab, an institution admin can choose 'change lab' to update membership
2. After approving the member's account, assign FOP(s) to the new member



### Assigning FOP to Members of a Lab

The 'Manage FOP' section will include a grid of all members that have been given access to your lab and FOP that you are the owner of. For core facilities to bill for services, the user must be assigned a FOP. If the FOP needed for a lab member to charge services against does not exist in the grid, they can be requested through the '[Requesting Access to Non-sponsored FOPs](#)' section.

1. Within your lab navigate to the 'Membership Requests & FOPs' tab
2. In the 'Manage FOP' section click on the appropriate check box to assign a member a FOP
3. Assign the appropriate FOP(s) to each member on the list
4. When the box turns green that means the information has been applied to the member

Name	Default FOP (Activity Code)	20000	20000	20000
	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Requesting Access to Non-sponsored FOPs

**Institution admins, PIs, and Lab Managers** can request access to a non-sponsored FOP. A non-sponsored FOP comes through in the nightly fund file with an identifier that it is non-sponsored. These FOPs live in the background within iLab waiting to be manually added to a lab.

1. Navigate to your lab
2. On the 'Membership Request & FOPs' tab expand the section below the FOP Grid section called 'Request access to additional FOPs'
3. Enter the entire FOP (XXXXXX-XXXXX-XXXXX) within the text box
4. Click 'Request'
5. If the FOP is valid a request will be sent to the fund owner to approve

### ▼ Request access to additional FOPs

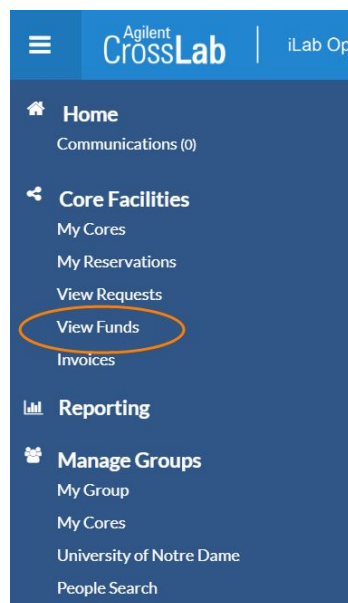
🔔 If you don't see a FOP that you should have access to, please type it in below. The Fund Owner will receive a notification and approve or deny your request.

★ FOP

## Managing Non-Sponsored FOP Requests

PIs and/or Lab Managers can request access to Non-Sponsored FOPs within their lab. When requesting access to these FOPs, the owner of that FOP must approve the request.

1. Within the left-hand navigation menu select 'View Funds'



2. Pending access requests to Non-Sponsored FOPs will appear in the first section
3. Use the action buttons on the left to 'Approve' or 'Reject' the request

## FOPs

Pending Access Requests							
Created	Lab	Requestor	Fund Owner	Fund	Notes	Status	Actions
Mar 23 '20	(ND) Lab	iLab Admin (admin@ilabx.com)	Michelle	10000		pending	Approve Reject
Mar 23 '20	(ND) Lab	iLab Admin (admin@ilabx.com)	Charles	10001		pending	Approve Reject
Mar 03 '20	(ND) Lab	iLab Admin (admin@ilabx.com)	Jennifer	40000		pending	Approve Reject

## Removing a member from your lab

Only users who do not have outstanding charges within a core facility can be removed from your lab.

1. Navigate to your lab
2. Click the 'Memberships' tab
3. Find the member in your list of current lab members
4. Click the trash can icon to the right of the member

**Note:** Alternatively, you can click the blue edit pencil icon and add in an end date

## Lab members and settings

Active Members		Expired Members					
Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date	End Date	
Kenneth	Lab default (\$0.00)						👤 📄 🗑️
Dana	Lab default (\$0.00)				Apr 17, 2020		👤 💰 📄 🗑️
David	Lab default (\$0.00)						👤 📄 🗑️
John	Lab default (\$0.00)						👤 📄 🗑️

## Adding members to your lab

If a member/user already has an existing iLab account but needs access to your lab, you can add them manually. Users cannot request access to more than one lab at the time of registration, but they can after they already have an iLab account.

*Link an existing user to your lab:*

1. Navigate to your lab
2. On the 'Members' tab, select 'link existing user' below the list of your current lab members
3. In the text box begin to type the member's name

4. Users that match your search will begin to populate. Select the appropriate user
5. Change the type of membership the user should receive (member, manager, or PI)
6. Set a start date and end date of their membership to your lab (optional)
7. Click invite
8. Assign the new lab member a FOP

#### Lab members and settings

Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date	End Date
Victoria	Lab default (\$0.00)					

Link Existing User

#### *User requests access to your lab:*

1. Click 'My Group' in the left-hand navigation panel
2. Select 'Request Group Access'
3. Enter the institution the group lives in, most cases this will be University of Notre Dame
4. In the 'Group' field. type the last name then first name of the PI
5. Click 'Request Access'

Request Group Access

Institution \*  
University of Notre Dame

Group \*

Cancel Request Access