Lab Management: Adding Members and Assigning Permissions

Lab permission levels:

PI - Lab owner. Can request services/reserve equipment time, view and pay invoices, add chartfields to lab

Financial Manager - Can request services/reserve equipment time, view and pay invoices, add chartfields to lab

Lab Member - Can request services/reserve equipment time

**Many PI's assign a department fiscal person as the Financial Manager to their lab in order for them to view/pay invoices as well as add/change chartfield information.

To add lab members in your lab:

- Navigate to the Members tab of you lab page. (all current members of the lab will be listed here)
- Scroll to bottom and click Link Existing User. Begin typing the last name or email address of the user.
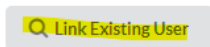
- Click their name and Invite.
- The new user will show up under the Active Member tab. They are now a lab member (see permission levels above)

**Members must first have an iLab account created to be added to a lab.

To accept a membership request into your lab:

- Navigate to the Membership Requests & PeopleSoft Project Numbers tab on your lab page.
- You will see a notification icon on the tab. Click Accept to approve the request. You will now see the lab member under the Active Members tab.

To change a lab member's permission level:

- Navigate to the Members tab of your lab page.
- Click on the pen graphic at the far right of the lab member's name

- A pop up for Edit Membership will open. Use the drop down box under Permission to change the user's permission level to manager. Also, click the box for Core Financial Contact? Hit save.

Edit membership

Person Information

Email
Institutional e-mail is preferred

Phone number

Group Information

Auto Approval Amount

$ 1000.00

Association Information

Permission

manager

☐ Can order?

☑ Core Financial Contact?

Start Date ⊘   **End Date** ⊘

Cancel   Save

- The icon next to the user's name will update. (PI's and Financial Manager's have a dollar sign next to their icon)