Internal - New Registration Manual

Creating Service Requests & Reserving Time on Equipment

To Create a Service Request:

1. **Login into iLab** at ufl.corefacilities.org with your Gatorlink username and password
2. Upon initial login, **set your account time zone**, then click '*Update my time zone.*'
3. **Click** on the [≡] icon to open the iLab menu
4. **Select** *'Core Facilities'*
5. **Search** 'ICBR' and select your desired core
6. **Depending on the core**, you will either land on the '*Request Services'* tab or the *'Schedule Equipment'* tab. On the *'Request Services'* tab, **find the project** of interest and click on the the *' Request Service'* button to the right of the request
7. You will be asked to **complete a form** and **provide payment information** for your request before submitting to the core.
   a. Your payment options will be **Chartfield or Credit Card.**
8. Your request will be **pending review** by the core. The cores will add charges and may submit it back to you for your approval. ⭐**Make sure to watch for an email from iLab regarding your updated project.**

To Create an Equipment Reservation:

1. **Login** into iLab at ufl.corefacilities.org with your Gatorlink username and password
2. **Click** on the [≡] icon to open the iLab menu
3. **Depending on the core**, you will either land on the '*Request Services'* tab or '*Schedule Equipment*' tab. On the '*Schedule Equipment'* tab, **click** on the '*View Schedule'* or the '*Initiate Tr aining'* button next to the instrument of interest. **Click and drag** on the time frame you would like to reservation for.
4. You may be asked to **complete a form** and **provide payment information** for your reservation before submitting to the core. If you do not have any chartfields assigned, **your PI or financial manager will need to add the chartfield** to the lab and assign to you.
5. **Your reservation may need to be approved by the core**, you can confirm this by clicking on the *Home* link on the upper left corner of iLab and viewing the Reservations panel.

ⓘ If you encounter issues at any step, please send an email to the ICBR iLab listserv at ICBR-iLab@ad.ufl.edu and a staff member will be in contact with you within 24 hours.

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.
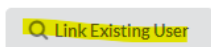
- Click their name and Invite.
- The new user will show up under the Active Member tab. They are now a lab member (see permission levels above)

**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.
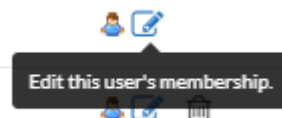

To change a lab member's permission level:

- 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.

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

Entering a New Chartfield

Instructions on how to add a chartfield string are listed below:

1. **Login** to iLab at https://ufl.corefacilites.org
2. **Click** on the ▤ icon
3. **Select** *'My Groups'* and then the lab you are adding it to
4. **Click** on the *'Membership Requests & Peoplesoft Project Numbers'* tab on the lab page
5. **Under** the '*Manage PeopleSoft Project Numbers'* heading, **click** on the **blue** arrow next to '*Manually add a new UF Chartfield.*' This will open and provide a field where you can type in the chartfield string in the **specified format:**
   a. You **must** enter the **entire** chartfield string in this format **(including dashes)**:
      i. Department (8 numerical characters)
      ii. Fund (3 numerical characters)
      iii. Program (4 numerical characters)
      iv. Budget reference (5 alpha characters)
      v. Source of Funds (8 alpha-numerical characters)
      vi. PC Business Unit (5 alpha characters)
      vii. Project (8 numerical or alpha-numerical characters)
      viii. Activity (will usually be 1)
      ix. CRIS (6 alpha-numerical characters)
      x. Department FLEX (10 alpha-numerical characters)
      xi. UFID (8 numerical characters)
   b. **Grants will always** be accompanied by an activity of 1
   c. If there are **missing fields**, they must be **replaced by a dash**. See examples below:
      i. EXAMPLE 1: 29190100-209-2200-CRRNT-G000740-GRANT-00120752-1---16427444

         EXAMPLE 2: 29190100-209-2200-CRRNT-G000880-GRANT-00083802-1---

         EXAMPLE 3: 29190100-209-2200-CYFWD-F023400-------

      Total number of fields (with or without dashes) must be 11.

   > ✅ Using '0' as a placeholder can sometimes be beneficial to ensuring you have the correct amount of dashes. Be sure to delete all placeholder '0's before clicking 'Add.' If you need any assistance, email ICBR at ICBR-iLab@ad.ufl.edu.

6. **Click** *Add*. The chartfield string will be added under the *Manage PeopleSoft Project Numbers* heading along with a list of the lab members.
7. **Check the box** to the right of the lab member's name to assign the chartfield. When the lab member requests services or schedules time on equipment, this chartfield may be selected to charge the service against.

> ⓘ Only a PI or Financial Manager can add a new chartfield or give access to other members.

Updating Payment Information on a Service Request

Instructions

1. **Login** to iLab at https://ufl.corefacilities.org

2. **Click** on the [≡] icon
3. **Click** on '*Core Facilities'*
4. **Search** for the core you requested services under
5. Once on the core page, **click** '*View My Requests*'

▼ active requests

6. **Click** and **change it** to *'All Requests'*

7. **Find the request** that needs to be updated and **click** on the ▶ to drop it down

8. **Click** on `update payment information` on the **right hand side** of the request to open the image box
   a. If you are a part of an **INTERNAL (UF)** lab, you will have the options of *Credit Card* or *Chartfield.*
      i. If you would like to **use a chartfield**, you need to **be sure that you have a chartfield in your lab**, as well as that it has been **assigned to you** by your PI or financial manager or you will not have one available. ⭐**If you need assistance** entering in a new chartfield, email ICBR-iLab@ad.ufl.edu
   b. If you are a part of an **EXTERNAL (Non-UF)** lab, you will have the options of *Credit Card, PO, Wire Transfer,* or *Check.*⭐**If you have any questions,** email ICBR-iLab@ad.ufl.edu
9. **Select all** charges you would like to apply fund to and **click SAVE.**

⚠️ **For both** INTERNAL and EXTERNAL:

If you choose Credit Card, PO, Wire Transfer, or Check - you are responsible for ensuring the invoice is paid once you receive notice of creation. Marking a charge to be paid by one of those payments methods does NOT automatically pay it but rather serves as a place holder. If you have any questions regarding this, please reach out to ICBR-iLab@ad.ufl.edu.

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