iLab Access & Management Guide for PIs and Lab Managers

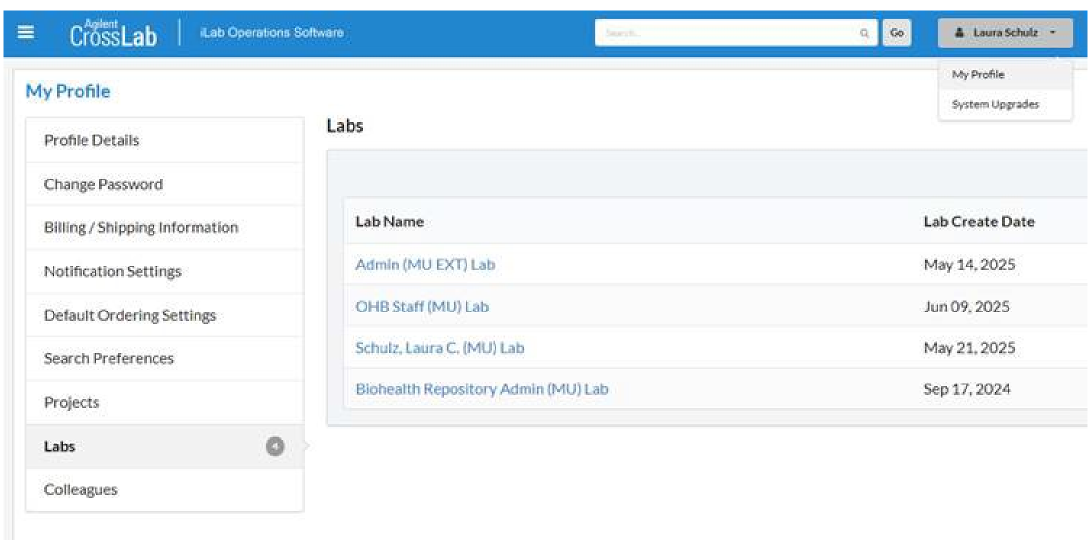
Principal Investigators (PIs) and designated Lab Managers should log in to the iLab Portal using their **@umsystem.edu** credentials to manage their lab group. Once logged in, you can:

- Set up payment methods (MoCodes) for your lab group
- Approve registration requests from lab members
- Assign lab members as "Managers" with administrative privileges

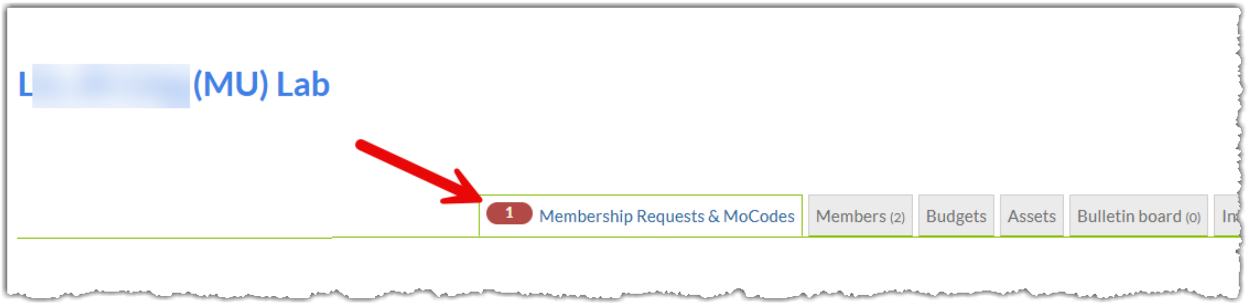
Setting Up Payment Methods (MoCodes)

To enable your lab to use MoCodes for OneHealth Biorepository services:

1. Log in to iLab.
2. Click your name/profile in the upper-right gray box.

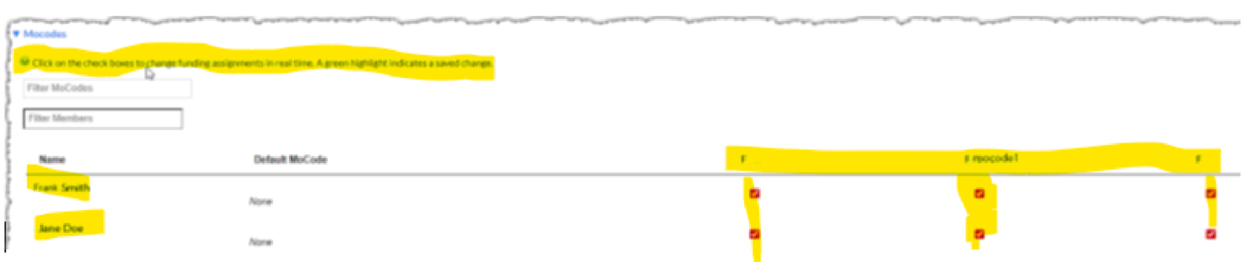


3. From the left-hand menu, select your lab group.
4. Navigate to the "Membership Requests & MoCodes" tab.
5. Scroll down and click on "Request access to additional MoCodes."



6. Enter the MoCodes your team will use.
    - Your request will be sent to the financial team for approval via a PeopleSoft-authorized signer.
    - You will receive an email notification once the MoCode is approved.

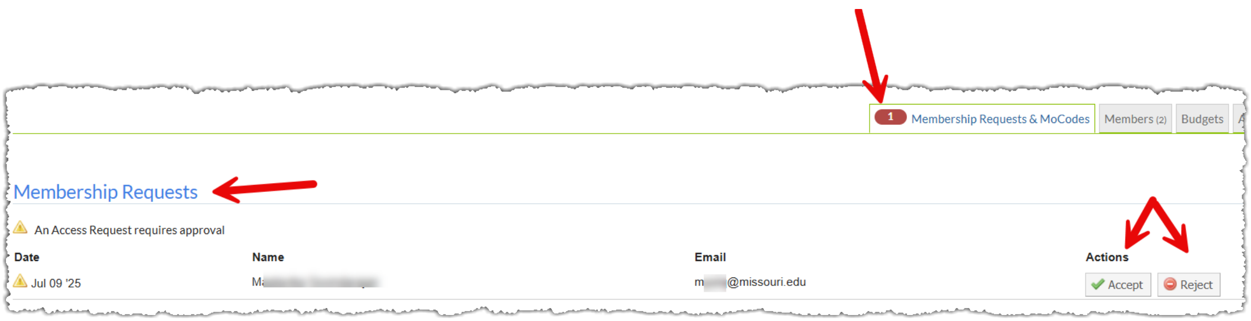
7. Once approved, return to the same tab and scroll to the "MoCodes" section.
    - Assign authorized MoCodes to specific lab members by checking the appropriate boxes next to their names.



<u>Approving Membership Requests</u>

When new users register or request access to your lab:

- You’ll receive an email notification.
- Alternatively, log in and go to your profile > Lab Page.
- On the “Membership Requests & MoCodes” tab, look for the number of pending requests shown in a red oval.
- Scroll down to the “Membership Requests” section.
- Approve or reject each request by clicking the respective buttons.



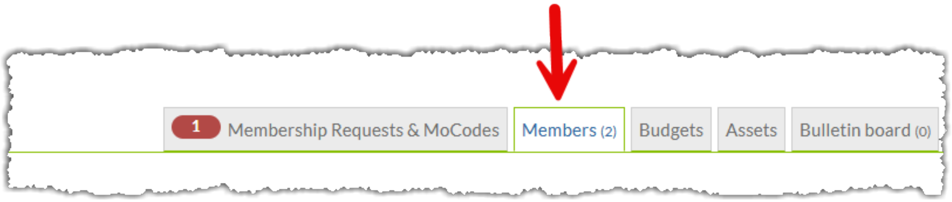
Assigning the Manager Role

One or more lab members can be designated as “Manager” and can help manage lab operations. Managers are allowed to:

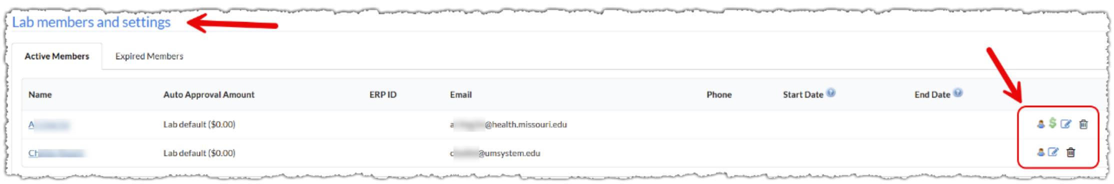
- Request and assign MoCodes
- Approve new member registrations
- Maintain lab group settings.

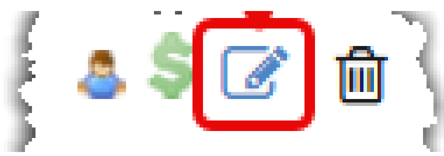
To assign the Manager role:

1. Go to your profile > Lab Page.
2. Click the “Members” tab.



3. Under "Lab members and settings," find the row for the member you wish to grant the access to.
4. Click the blue pencil icon to edit their role.





5. In the "Edit Membership" window, scroll to the "Association Information" section.
6. Under "Permission," select "Manager" from the dropdown menu.
7. Save your changes.