Getting Started with iLab: PIs and Lab Managers

Standard Operating Procedure 053 for Pitt iLab System

iLab Role: Lab Administrator **Revision** #: 0 **Date:** 12/2025

Contents

Purpose

This SOP describes how PIs and lab managers can get started in Pitt's iLab system. Each PI who intends to use iLab must first set up their lab in the system. Once set up, students, post-docs, and other lab members may proceed with their own registrations. Users must join a PI/lab group and have account numbers assigned to them before they can schedule equipment or make service requests at core facilities. This document also describes how a PI can delegate these tasks to a lab manager, who has similar access and permissions in iLab as the PI.

Scope

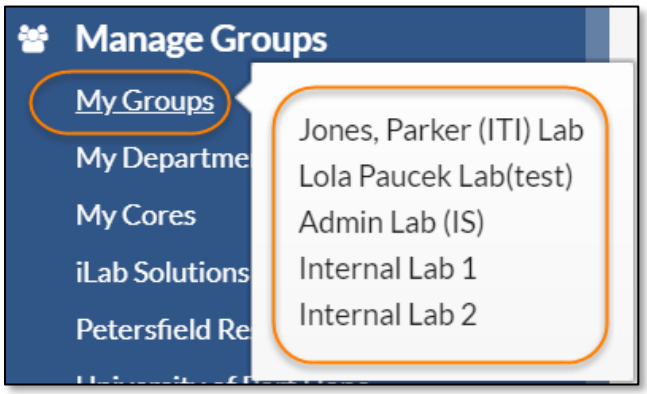
This SOP applies to all PIs at the University of Pittsburgh, including those with funding through both the University of Pittsburgh and either UPMC or the Magee-Womens Research Institute (MWRI). PIs and lab managers have lab administrator roles in iLab.

Instructions for PIs with sponsored (05) accounts

PIs with sponsored (05) accounts will find that their accounts are already loaded into iLab via the integration with Pitt's financial system. All you need to do is set up your lab in iLab. When an individual registers for an iLab account, they must choose a PI lab group. You or

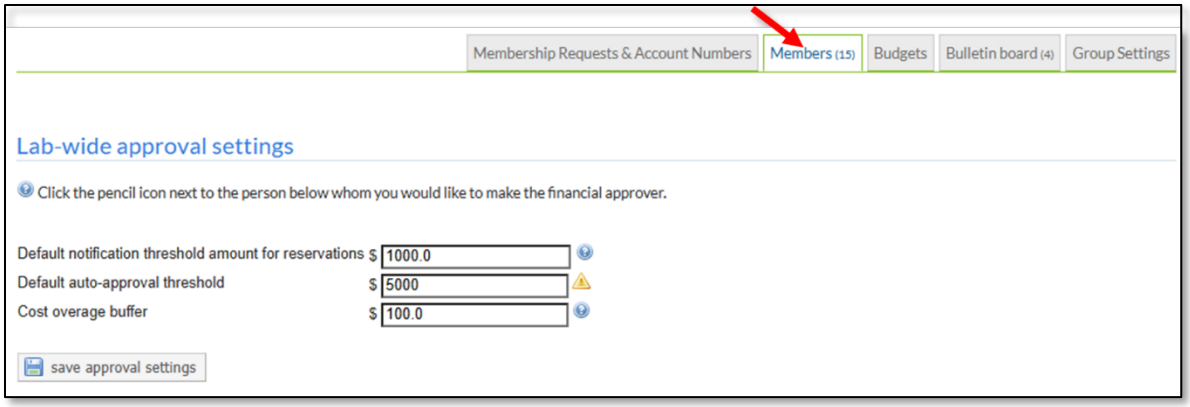
your delegate will then receive a 'request for approval' email when an individual requests access to your group.

1. Click here to login: https://pitt.ilab.agilent.com/account/login
2. You will use your Pitt credentials (with your official Pitt email, not an alias email) to log into iLab, even if you have UPMC and/or MWRI funds.
3. Once logged in, look for the link in the left-hand menu that says, 'My Group'. Hover-over your lab name and select it. If you have only one group, clicking the link will take you straight there.



4. Under the 'Members' tab, set the lab-wide approval settings:
    i. **Default notification threshold amount for reservations**: the financial administrator will receive an email notification if the cost of a reservation scheduled by a lab member exceeds this amount.
    ii. **Default auto-approval threshold**: financial approval will be required when the projected cost of a service request exceeds this amount. New service requests below this threshold do not require approval by a financial administrator.
    Note: This can be changed for an individual member by clicking on the blue pencil icon next to their name and entering the amount in the 'Auto Approval Amount' section. Click Save.
    iii. **Cost overage buffer**: Financial administrators will receive an email if the actual cost of a service request exceeds the approved cost by more than this buffer.
    iv. Click 'save approval settings'.

Getting Started with iLab: PIs and Lab Managers



5. Instruct your lab members (including students, post-docs, etc.) to register for an iLab account following SOP 001 University of Pittsburgh iLab Registration Guide.
6. To approve lab membership requests, select the 'Membership Requests & Account Numbers' tab. New membership requests will be shown at the top of this page. Click 'Approve' to accept a member into your lab. Click 'Reject' if they are not a member of your lab.
7. To assign the appropriate account number(s) to a member of your lab, find the member in the 'Manage Account Numbers' section, under 'Account numbers'. Select the checkbox(es) to the right of their name for the account number(s) that should be assigned.
    i. Note: Account numbers are loaded and updated in iLab through a nightly fund file provided by Pitt's general accounting office. Non-sponsored accounts are included in the file but must be requested into a PI's lab before they can be assigned. Follow instructions in this section to request access.

Instructions for PIs with non-sponsored (02, 03, 04) accounts

PIs with only non-sponsored accounts (i.e. 02, 03, and 04) must register for iLab first and have their lab manually created by an institutional administrator.

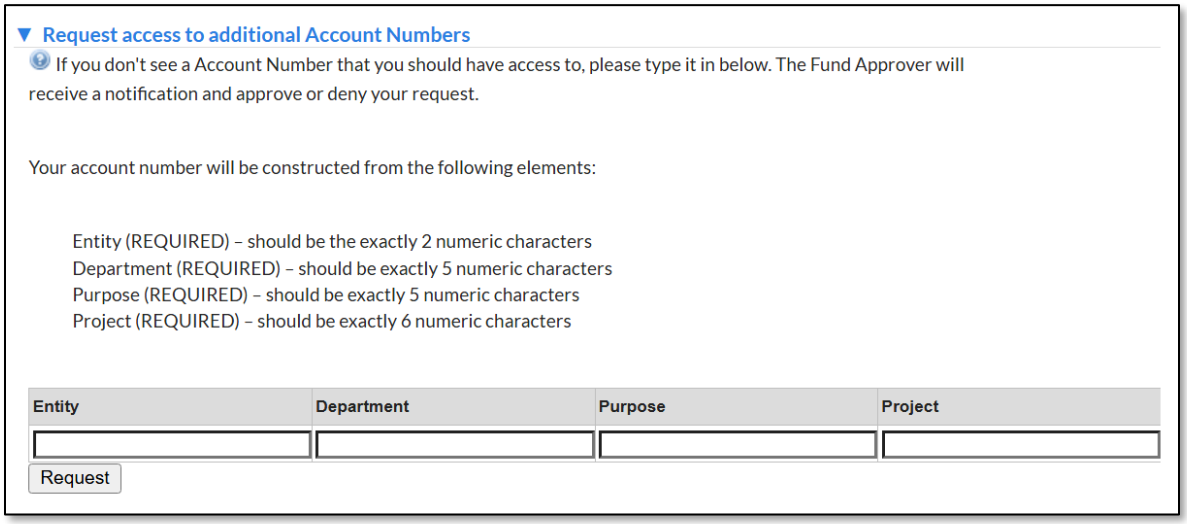
1. Click here to log-in: https://pitt.ilab.agilent.com/account/login
2. Use your Pitt credentials to log into iLab (official Pitt email, not an alias email). You will be directed to a registration page.
3. Enter your information in all the required fields. Select the 'Admin (PITT) lab' for the PI/Group and contact an institutional administrator (at cores@pitt.edu) to manually create your lab in iLab.
4. Once complete, follow the instructions above to set up your lab.

Getting Started with iLab: PIs and Lab Managers

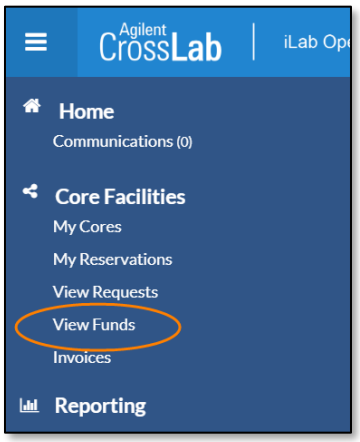
Requesting access to additional account numbers

Non-sponsored account numbers (i.e. 02, 03, and 04 accounts) are included in the nightly fund file with an identifier that it is non-sponsored. These accounts live in the background within iLab and must be requested into a lab to be visible in the account number section.

1. On the 'Membership Request & Account Numbers' tab expand the section called 'Request access to additional account numbers.'
2. Enter the account number within the text boxes (all fields are **required**). The account number will be constructed from the following elements:
    i. Entity: should be exactly 2 numeric characters
    ii. Department: should be exactly 5 numeric characters
    iii. Purpose: should be exactly 5 numeric characters
    iv. Project: should be exactly 6 numeric characters
3. Click 'Request.'



4. If the account number is valid, it must be approved. If the account number is not valid an error message will appear. The owner of that account number must approve the request.
5. Navigate to 'View Funds' in the left-hand navigation menu.



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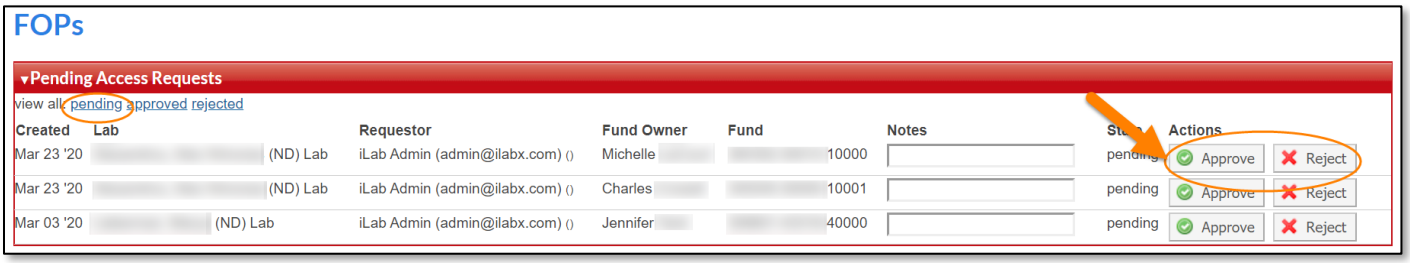
6. Pending access requests to non-sponsored account numbers will appear in the first section.



7. Use the action buttons on the right to 'Approve' the request.
8. Navigate to the 'Membership Requests & Account Numbers' tab of the PI lab group and select the checkbox(es) to the right of their name for the non-sponsored account number(s) that should be assigned.

Delegating notifications and approvals to a lab/group manager

1. Have your lab/group manager register for an iLab account following the instructions in SOP 001 University of Pittsburgh iLab Registration Guide.
2. Approve their membership in the 'Membership Requests & Account Numbers' tab.
3. Select the 'Members' tab. You may have to refresh the page for their name to appear.
4. Click on the blue pencil icon to edit their membership.
5. Select 'manager' in the permission drop down menu.
6. Click Save.
7. Email ilab-support@agilent.com with your lab manager's name, official Pitt email and indicate you would like to delegate these notifications/approvals.

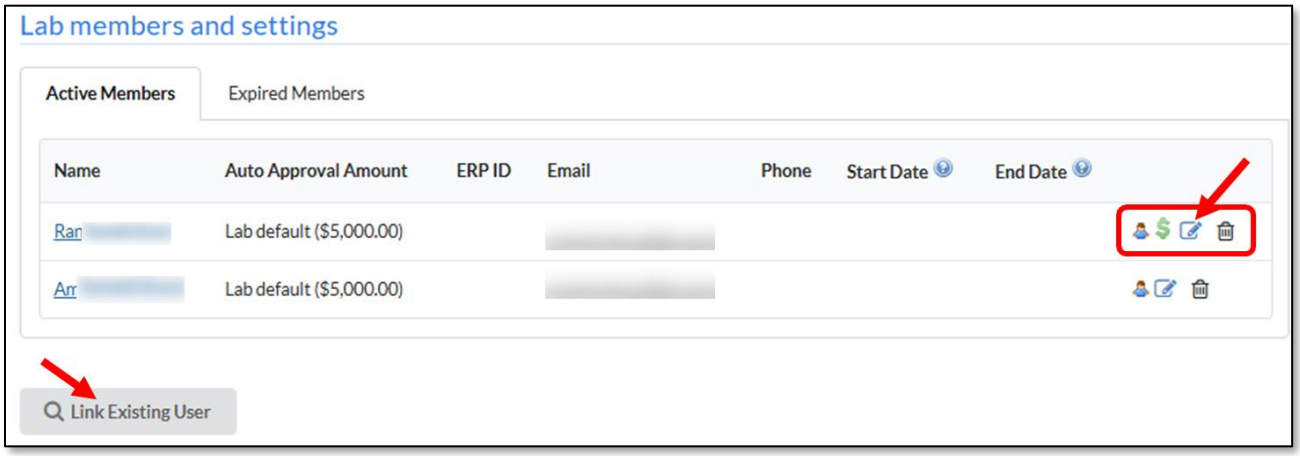
Managing Memberships

The 'Lab members and settings' section in the 'Members' tab allows you to add or remove members from your lab and manage the existing memberships. In addition to assigning a lab or group manager, it is important to designate a lab financial contact. This person will receive all email notifications requiring the lab administrator's attention, such as the approval thresholds defined in the previous section and communication from core staff if needed.

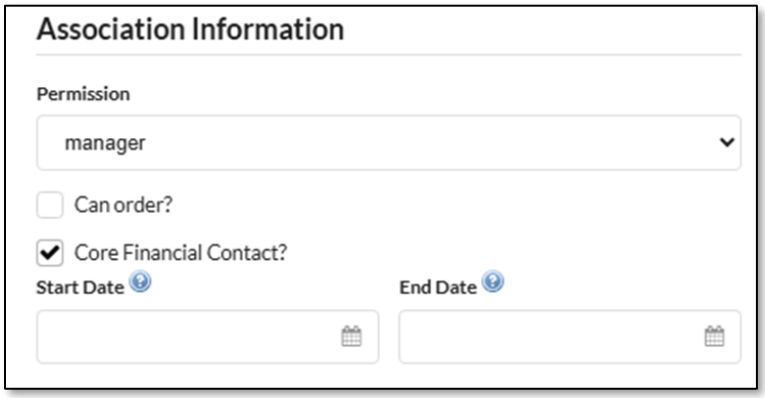
1. The icons to the right of a member's name in the 'Lab members and settings' section in the 'Members' tab is how to manage each member.
    i. **Role (person icon)**: Hover your mouse over the person icon to display the role of the use. When blue, this icon is identifying PIs and members. The orange version of the icon represents manager designation.

ii. **Financial contact (dollar icon)**: This icon indicates the user is the lab group's financial contact.
iii. **Edit member (pencil icon)**: Allows you to edit the membership settings (see next step).
iv. **Remove member (trash icon)**: Removes the user from the lab. Note: Pitt requires the use of expiration dates for removing users in iLab. See SOP 050 Required Use of Expiration Dates for iLab User Offboarding.

2. Editing member (blue pencil icon): Clicking on this icon will open a window, allowing you to edit the membership.



3. Using the drop-down menu under 'Permission', select 'manager' and check the box next to 'Core Financial Contact' to designate the lab's financial contact. Click Save.



4. Assign any other members you would like to have manager and/or financial manager permissions. Multiple members in your lab are permitted to have these roles.
5. If a member of your group is registered for iLab, but has not yet been added to your lab, you can add them by clicking on the 'Link existing user' button at the bottom of the 'Members' tab page.
   i. Type in their name in the search field and select the user's name from the search results.

ii. Assign their role (member or manager) and click 'invite'.

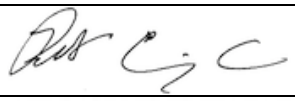
PIs with UPMC/MWRI funds

If you are a PI who has funding through both the University of Pittsburgh and either UPMC or MWRI, you must follow the steps outlined above first. Once your Pitt lab is set up in iLab, follow these steps:

1. Create a Help ticket at: https://agilent-ilab.na1.teamsupport.com/createticket
   i. State that you need a UPMC and/or MWRI lab created and linked to your Pitt lab.
   ii. Provide iLab with your official Pitt email and Pitt lab name (Last Name, First Name (PITT) Lab).
2. Once completed, you will have the option to select your UPMC or MWRI lab when making requests or scheduling reservations. See SOP 051 Joint Appointments Workflow for further instructions.

References

- Agilent's iLab Help Site on Managing a Group

Approval Authorizations	Signature	Date
Robert Cunningham, *Vice Chancellor for Research Infrastructure, University of Pittsburgh*		9 Dec 2025
Ashley Zyhowski, *Research Project Manager, University of Pittsburgh*		9 Dec 2025