

Click by Click instructions for Adding Account Numbers to PI labs in iLabSolutions (for departmental managers, lab managers, and PI's)

1. Departmental Accountants, PI's, and Lab managers are the only groups who can add or delete account numbers in iLabSolutions. Please contact one of these faculty or staff members if you need account access.
2. Login to iLabsolutions <https://uga.ilabsolutions.com/account/ldap/uga> preferably through Firefox internet web browser. Your network ID = your UGA MyID. Meaning only type your Network ID: [auser](#) (example) NOT your email [auser@uga.edu](#) (example).

Please Use your network credentials

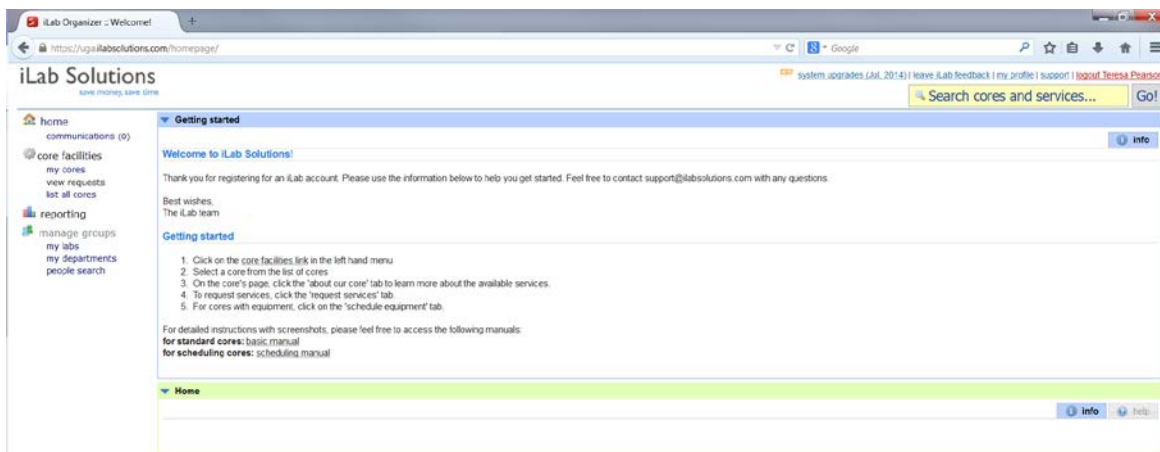
Network id:

Password:

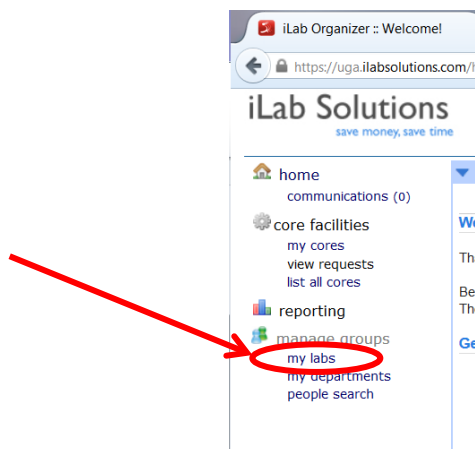
[Login using iLab credentials.](#)

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3. You will be sent to your main screen as seen below.



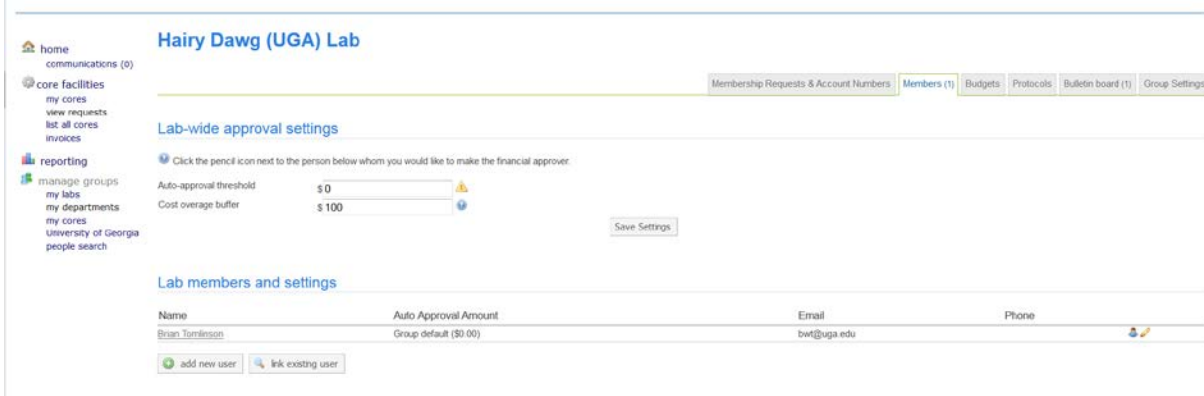
4. On the left hand side of the screen find the “my labs” link and select it



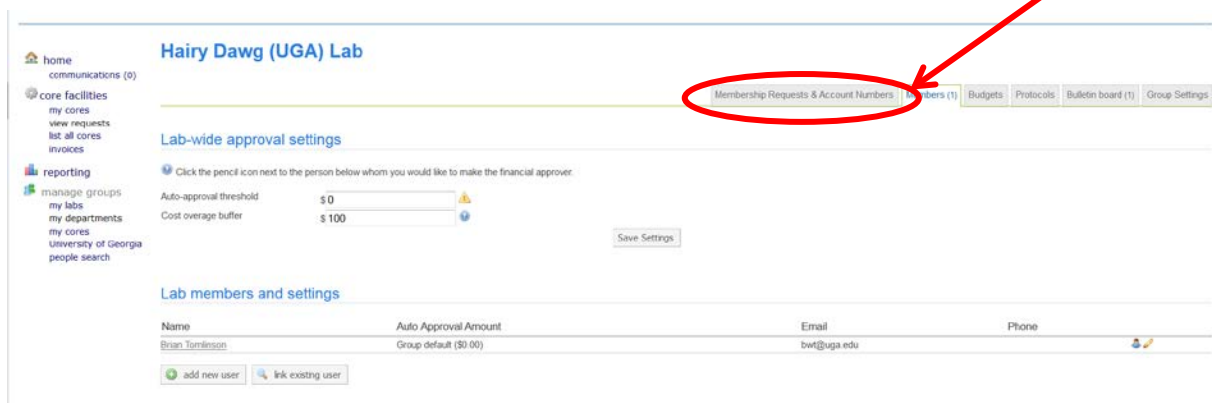
5. The departments you have access to will appear to the right of the “my labs” link. Select a lab by clicking on it with your mouse.



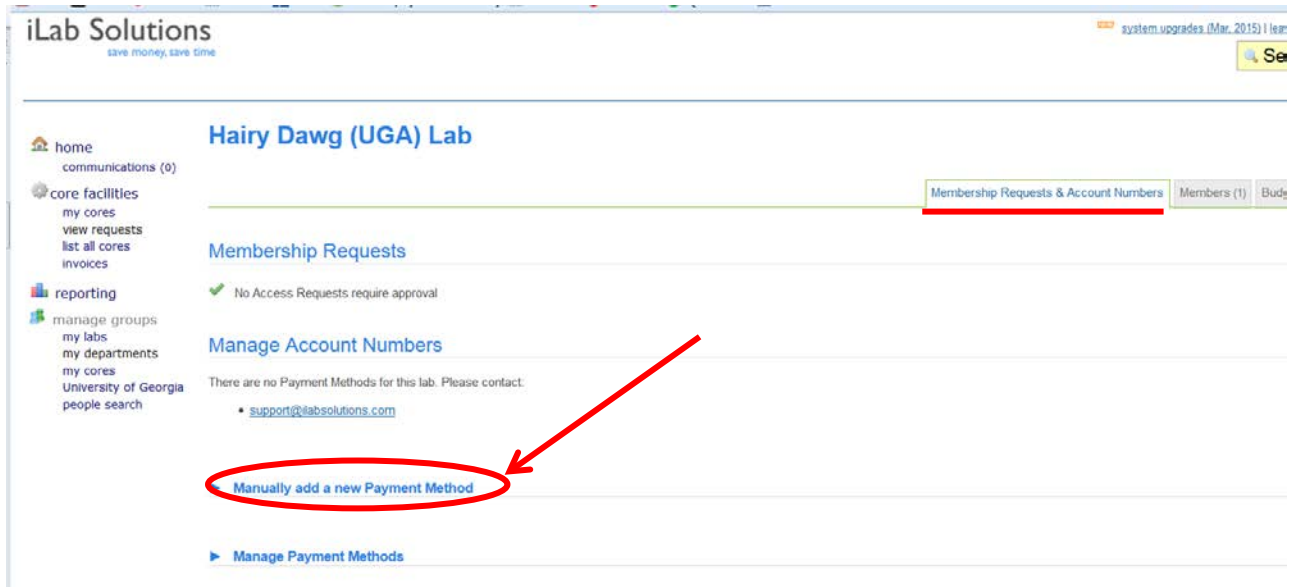
6. You will be taken to the “members” screen for the selected lab.



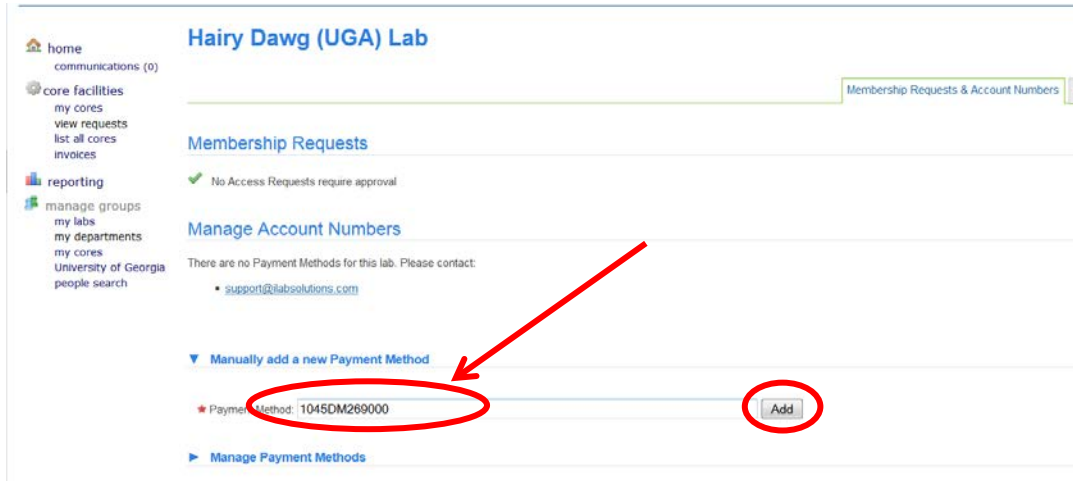
7. Once selected, the lab you chose should appear as illustrated below. Select the tab titled “Membership Requests & Account Numbers”.



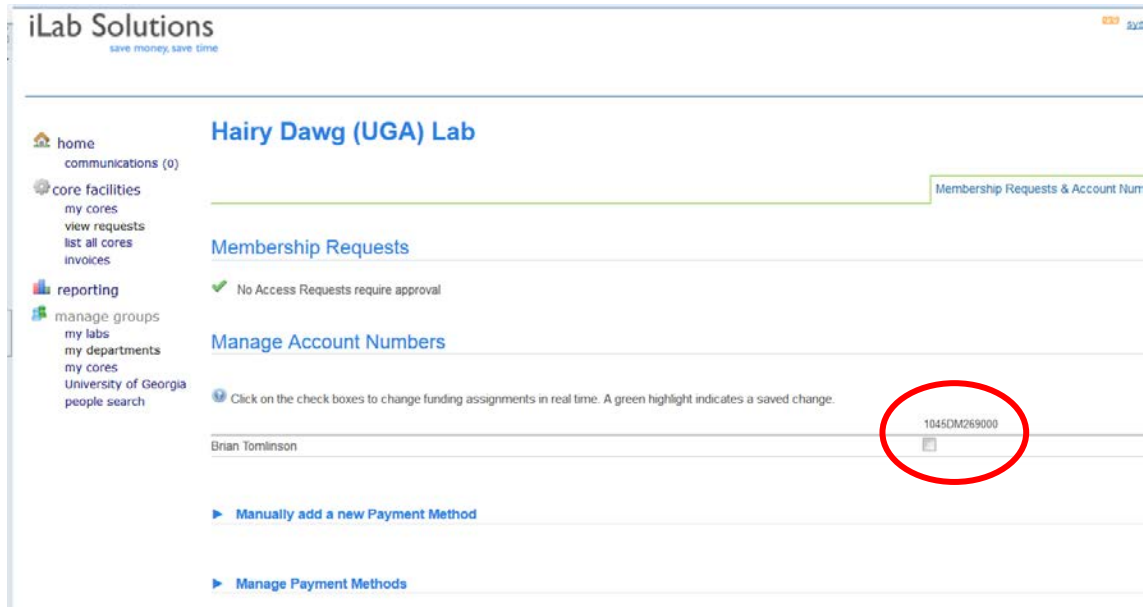
8. The “Membership Requests & Account Numbers” tab lists all the users for the lab and what, if any, accounts they have access to. Departmental admins must assign the accounts before they are ready to use. To add an account, select “Manually add a new Payment Method”



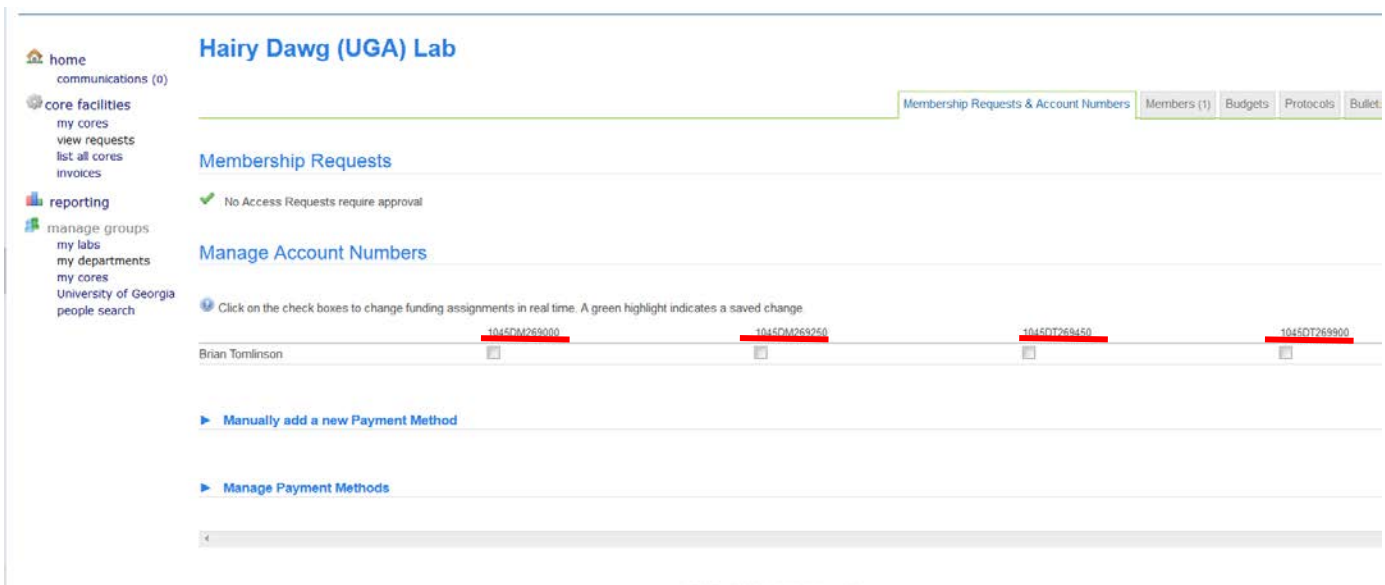
9. At the RED star titled “Payment Method” type the UGA account number you wish to assign. Only type the 12 characters in the UGA account number. Example: 1045DM269000 . No hyphens or other prefixes will be allowed. When finished typing click “ADD”



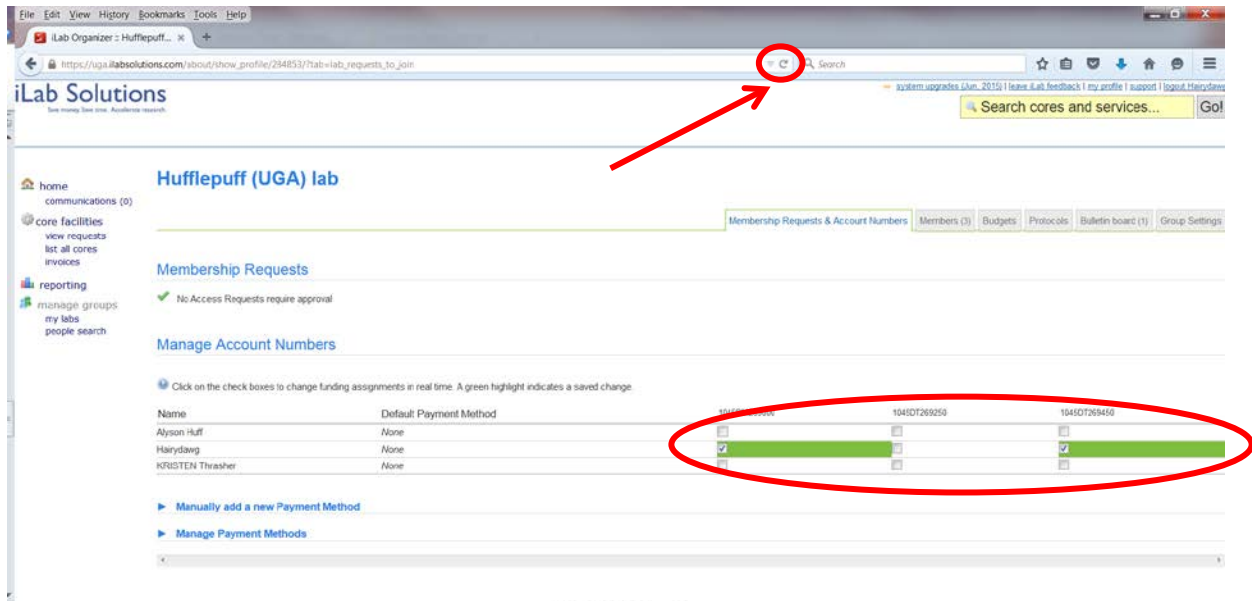
10. Once the account is added, all of the members of the lab will appear with a check box for each lab member beneath the account number heading. You can choose to add more accounts or select which lab members have access to this account.



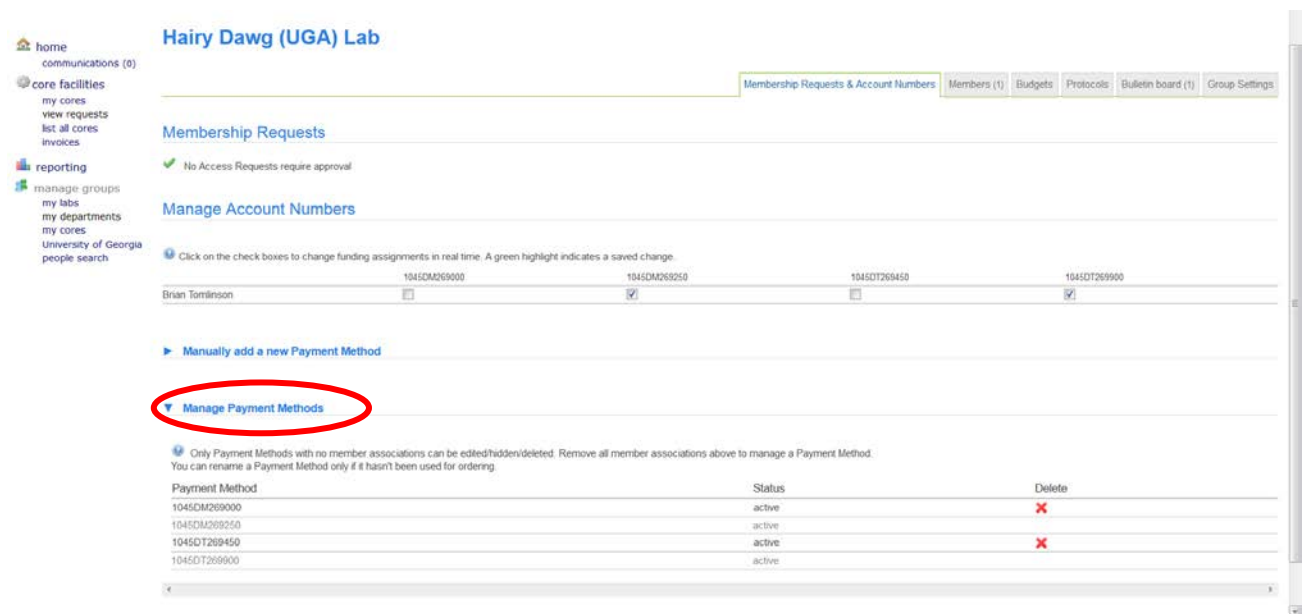
11. If you add multiple accounts, then check boxes for each will appear by all of the lab members.



12. Check the boxes of each lab member and the accounts you want them to access. Your selections should highlight in green. Click the refresh button to the right of your web address bar for changes to take effect.



13. If you choose to delete or rename an account select the “Manage Payment Methods” title.



14. Accounts that are assigned to lab members can not be edited, hidden, or deleted. iLabs will not allow any of these actions as long as you have a lab member assigned to an account in this lab. You will notice above that accounts that are a shade of gray lighter are assigned saved changes as to indicate they can not be hidden. Also, the 2 assigned accounts listed above that are currently active do not have a RED X in the delete column indicating that they can not be deleted.

15. **To DELETE an account** make sure no one is assigned to the account. If you unassign an account and the GREEN box appears, then you may need to go to your web address bar and click the REFRESH button so that the unassignment takes effect. Then select the RED X in the account row you desire to delete.

The screenshot shows the 'Manage Account Numbers' interface for the 'Hairy Dawg (UGA) Lab'. It includes a navigation sidebar on the left and a main content area with tabs for 'Membership Requests & Account Numbers', 'Members (1)', 'Budgets', 'Protocols', 'Bulletin board (1)', and 'Group Settings'. The 'Manage Account Numbers' section contains a table with columns for account numbers and checkboxes. The account number 1045DT269450 is circled in red. Below this, the 'Manage Payment Methods' section shows a table with columns for 'Payment Method', 'Status', and 'Delete'. The 'Delete' button for the payment method 1045DT269450 is circled in red.

| Payment Method | Status | Delete |
|----------------|--------|--------|
| 1045DM269000 | active | X |
| 1045DM269250 | active | X |
| 1045DT269450 | active | X |
| 1045DT269900 | active | X |

16. You will be prompted to click OK to delete the payment method. Click OK to complete the deletion.

The screenshot shows the same 'Manage Account Numbers' interface as above, but with a confirmation dialog box overlaid. The dialog box contains the text 'Are you sure you want to delete this Payment Method?' and two buttons: 'OK' and 'Cancel'. The 'OK' button is circled in red.

17. The account is removed from the “Member Requests & Account Numbers” tab, but you can choose to rekey the same account number if it becomes active again.

The screenshot shows the 'Hairy Dawg (UGA) Lab' management interface. On the left is a navigation menu with categories: home, communications (0), core facilities, reporting, and manage groups. The main content area has tabs for 'Membership Requests & Account Numbers', 'Members (1)', 'Budgets', 'Protocols', 'Bulletin board (1)', and 'Group Settings'. The 'Membership Requests' section shows a green checkmark and the text 'No Access Requests require approval'. The 'Manage Account Numbers' section includes a tip: 'Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.' Below this is a table with columns for name, account number, and checkboxes. The first row is for 'Brian Termination' with account numbers 1045DM269000 and 1045DM269250. Below are links for 'Manually add a new Payment Method' and 'Manage Payment Methods'. A tip states: 'Only Payment Methods with no member associations can be edited/hidden/deleted. Remove all member associations above to manage a Payment Method. You can rename a Payment Method only if it hasn't been used for ordering.' A table of payment methods follows with columns for 'Payment Method', 'Status', and 'Delete'. The first row shows '1045DM269000' with status 'active' and a red 'X' delete button. The other two rows show '1045DM269250' and '1045DT269900', both with status 'active'.

| Payment Method | Status | Delete |
|----------------|--------|--------|
| 1045DM269000 | active | X |
| 1045DM269250 | active | |
| 1045DT269900 | active | |