No Account Number Assigned

Navigating to Your Lab Group Page

1. Once logged in (see instructions above), look for the link in the left-hand menu that says 'my groups.' Hover over this link, and then select your lab, or simply click the 'my groups' link and then click the link for the lab group you want to manage.

2. The default tab you will land on when you navigate to your lab group’s page is the ‘Members’ tab. The various functions you will need to perform as PI can be performed via tools in the tabs seen here.

Granting UAccess Financial Account Access to Lab Members (PI, Financial Manager)

1. Navigate to the 'Membership Requests & Account Number(s)' tab (see above).

2. Find the member in the list under ‘Manage Account Number(s)’ section.

3. Select the checkbox(es) to the right of their name for the financial account number(s) you wish to permit them to use.

Note: Your lab members will not be able to create equipment reservations or create service requests without having accounts assigned to them.
Adding UAccess Financial Accounts to Your Lab Group (PI, Financial Manager)

1. Log in and navigate to the ‘Membership Request & Account Numbers’ tab of your lab group’s page (see instructions above).

2. Open the third section down on this tab titled “Request access to additional Account Numbers.”

3. Type the UAccess Financials account number, or account number-subaccount number (concatenate these values via a single dash) into the box and then click the ‘Request’ button.

4. An authorization request will be sent to the account’s owner, or controller, as defined in the section How Does iLab Recognize Account Owners, or Controllers?.

5. Once approved by the owner, or controller, the members of the lab group will need to be granted access to use the new account (see Granting UAccess Financial Account Access to Lab Members).
How Does iLab Recognize Financial Account Owners, or Controllers?

There are two ways that iLab could designate you as an account owner, or controller, by default. Each of these is dependent upon one of two specific fields within UAccess Financials. iLab will look to one and only one of these two fields for each account in UAccess Financials in order to determine the owner, or controller, for that account. If the account in question is related to a Sponsored Project (i.e. a 3 or 4 series account), then iLab will determine the owner based on the individual named within the Director Name field in the Award Account section of the Awards tab in the Account Inquiry screen within UAccess Financials.
For all other accounts (and account-subaccount pairs) iLab will determine the owner, or controller, based on the individual named within the Fiscal Officer Principal Name field in the Account Responsibility tab in the Account Inquiry screen within UAccess Financials.