iLab user guide

As a user/lab member:

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Core Services:

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How to register for iLab

All UTHealth employees are automatically registered for an iLab account, you only need to log in for the first time to activate it.

Logging in for the first time

[Click this link](#) to be taken to the UTHealth iLab home page. This page is the only one connected with your UTHealth credentials, so even after activating your account, you will always need to log in through this portal.

Select the 'login' button on the very top right of the page to log in. **Do not** select 'sign-up,' as the system has every UTHealth employee already registered.

A small pop-up box will appear asking if you are using a UTHealth account. Select the small 'here' button in the top section. It will load a new page asking for you to sign in with your UTHealth credentials.

Once logged in, it will pre-populate with some of your information and ask you to select the specific lab to which you belong. Select the box to find the specific lab you are looking for, then verify your first name, last name, and email before clicking 'Register.' You may also enter your phone number into the box provided, but it is not required.

Once registered, it will automatically send an email to the PI for that lab asking for their approval for your account. If you have not been approved within a couple of days, please ask them to check their spam folder, as all emails from iLab are sent from a 'no reply' email that often gets filtered.

In order for any user to request any services through iLab, they must have a CFS for payment attached to their account. When approving your account request, your PI must scroll down and select which CFS you can have access to. Once the CFS are applied, you can then request services through any available core.

Using a CFS from a different lab

In order to use a CFS that is with a specific group, you need to first be a part of that lab on iLab. You can be a part of any number of labs that you need to be. When you go to make a request, it will ask which lab you want to make this reservation for. Please choose the one that has access to the specific funds you need in order for the correct CFS to be available upon payment.

Joining an additional lab

Sometimes, you will be a part of multiple labs on iLab in order to make service requests with specific CFS or under specific lab names. To join a new lab when you're already registered in iLab, log into your iLab account, open the menu in the top left, then click the "Manage My Groups" header.
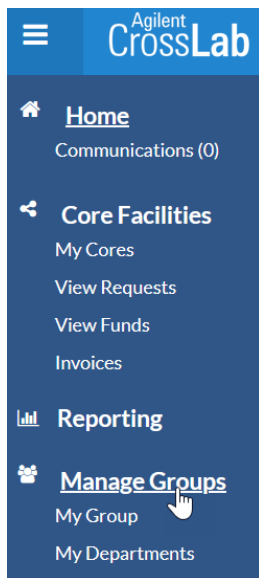
Select the button that says "Request Group Access." It looks like you shouldn't be able to click it, but it is just the color scheme.
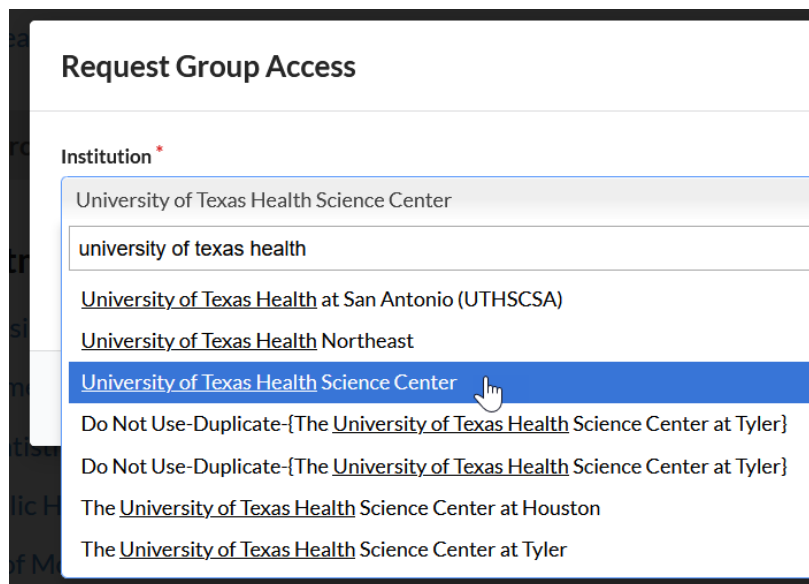
My Groups

My Groups

Admin (UT Health) Lab

Request Group Access 👆

It will then ask you for the institution and then what group you would like to join. There is a duplicate entity for UTHealth Houston in the system, so please select **"University of Texas Health Science Center"** in order to have access to all labs.

Once you enter UTHealth Houston and the group name (the name of the PI), select 'Request Access' and it will send your request to the PI of this new group. They can approve it by the normal way as stated previously.

My iLab group

iLab groups are automatically created in your name when you are assigned as the "owner" of a CFS within FMS. Members can join your lab if they also need access to the CFS in your group or if they need to make requests under your lab's name.

To access your iLab group, log in to your iLab account and select the menu button on the top right, then hovering over 'My Group' to be able to select the specific group. Any group you are a manger/PI of will appear here.
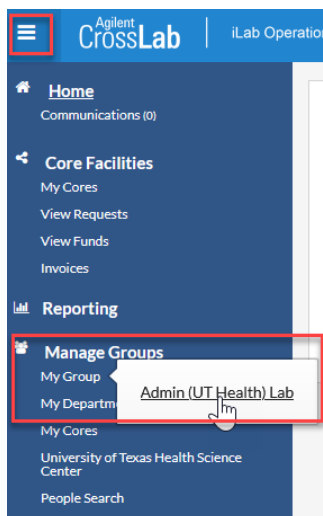
Adding members to my iLab group

When users log in for the first time, they will select the lab to which they belong. These requests show up for approval within the iLab group and can only be approved by the lab owner or the lab manager as assigned in iLab. To approve or deny requests, log in to your iLab account and go to your group's page.

Select the 'Membership Requests & Chartfield Strings' tab to view all current lab requests and approve or deny them.

In order to any user to request any services through iLab, they must have a CFS attached to their account. When approving their account, please scroll down and select which CFS this user can have access to. Every CFS associated with your name/group should already be available here.

Once the CFS are applied, the user can now use their account to request services through any available core.

You can also add users to your iLab group without them first requesting access. Go to the 'Members' tab in your group page and select the grey "Link Existing User" button at the bottom of the page. This will allow you to type in their name, select their email from the drop-down, and have them automatically added to your group. However, you are *only* able to add them this way if they have already activated

their account. If they have not yet activated their account, they will need to follow the instructions at the beginning of this document.

Editing CFS access for group members

Every CFS is assigned one "owner" in FMS by the accounting team, and that "ownership" is automatically reflected in iLab. Every CFS that is under a PI's name will automatically appear as a CFS in their iLab lab group. The lab owner of the group is automatically able to use any of the CFS that appear in their group, but any other member must have it manually selected for them.

To edit CFS access for any of your lab members, go to your iLab group and go to the 'Membership Requests & Chartfield Strings' tab. When you scroll down, you will see a table containing every lab member's name in one column, and every CFS you have access to in the rows. Simply select the box for that person's name under the CFS you want to give them access to and it will automatically update their account to allow them to use that CFS for any request.

Name	Default Chartfield String (Class)	UTHSC-00-00000000-00000-00-0000000-00000	UTHSC-00-00000000-00000-00-0000000-00000
Lab Owner	None	☑	☑
Researcher Name	None	☐	☐
Researcher Name	None	☐	☐
Researcher Name	None	☐	☐
Researcher Name	None	☑	☑

Every UTHealth iLab user needs to have at least one CFS connected with their account in order to make any requests with any of our cores.

Lab managers

Each lab user can be assigned a different role within the iLab group. The head of the lab is automatically assigned as "principal_investigator" and each subsequent member is automatically assigned as a "member." However, any member can be changed to the third option of "manager" if you want them to be able to manage the iLab group page on behalf of the PI.

To change roll of members, log into your iLab account and go to your iLab group page as described above. In the 'Members' tab, scroll down and select the pencil icon next to the name of the person you would like to update.

It will then open a small window with the user's information. Scroll down to the 'Association Information' and change the 'Permission' to be the correct label.
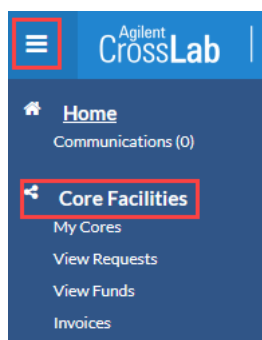

Requesting services through a Core/Research Center

To get started requesting services through cores, log into your iLab account, select the menu button on the top left, and select the 'Core Facilities' header.

The page of all UTHealth core groups available through iLab will load here. You can select any of the names on the list to go to their page and follow the instructions given on how to submit a new request.

If you are needing to access a core/research center outside of UTHealth Houston, on the search page, change the 'View' criteria to show "Cores at Other Institutions." This will allow you to search through every service center available through iLab.
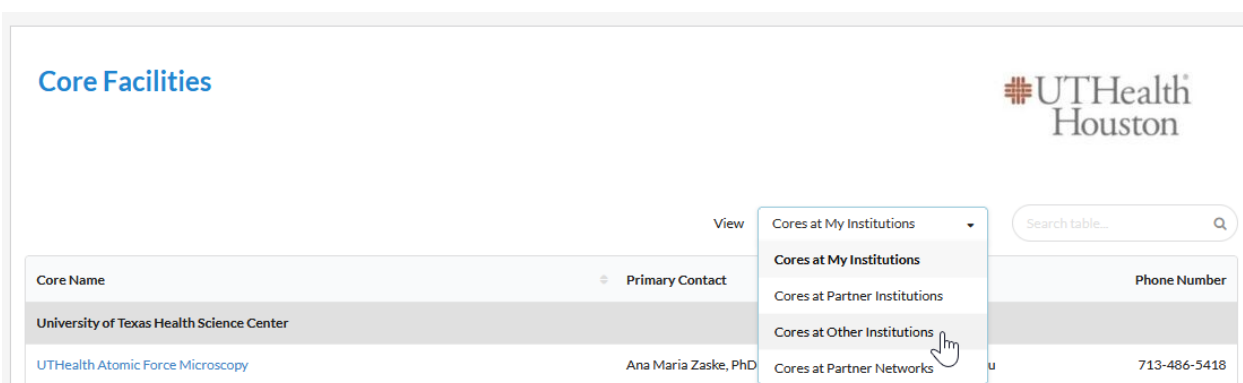
From there, use the search bar to the right to search for specific names or institutions to find the service center you need. Follow the instructions on their iLab page to request any of their services.

Who to contact with questions/issues

iLab has a very robust Help section of their site (found by going to the 'Help' button on the very top right of the screen and then selecting 'Help Site'), however, it is more for overall questions for system settings for groups and cores.

For any questions/concerns/issues concerning your iLab account, group, permissions, or CFS with your account, please reach out directly to the system admin Samantha Staton. Most issues (specifically with CFS) are done in-house and the iLab support team cannot help.