



## iLab – Account/Cost Center Access Request

### DESCRIPTION

Frequency

High

Medium

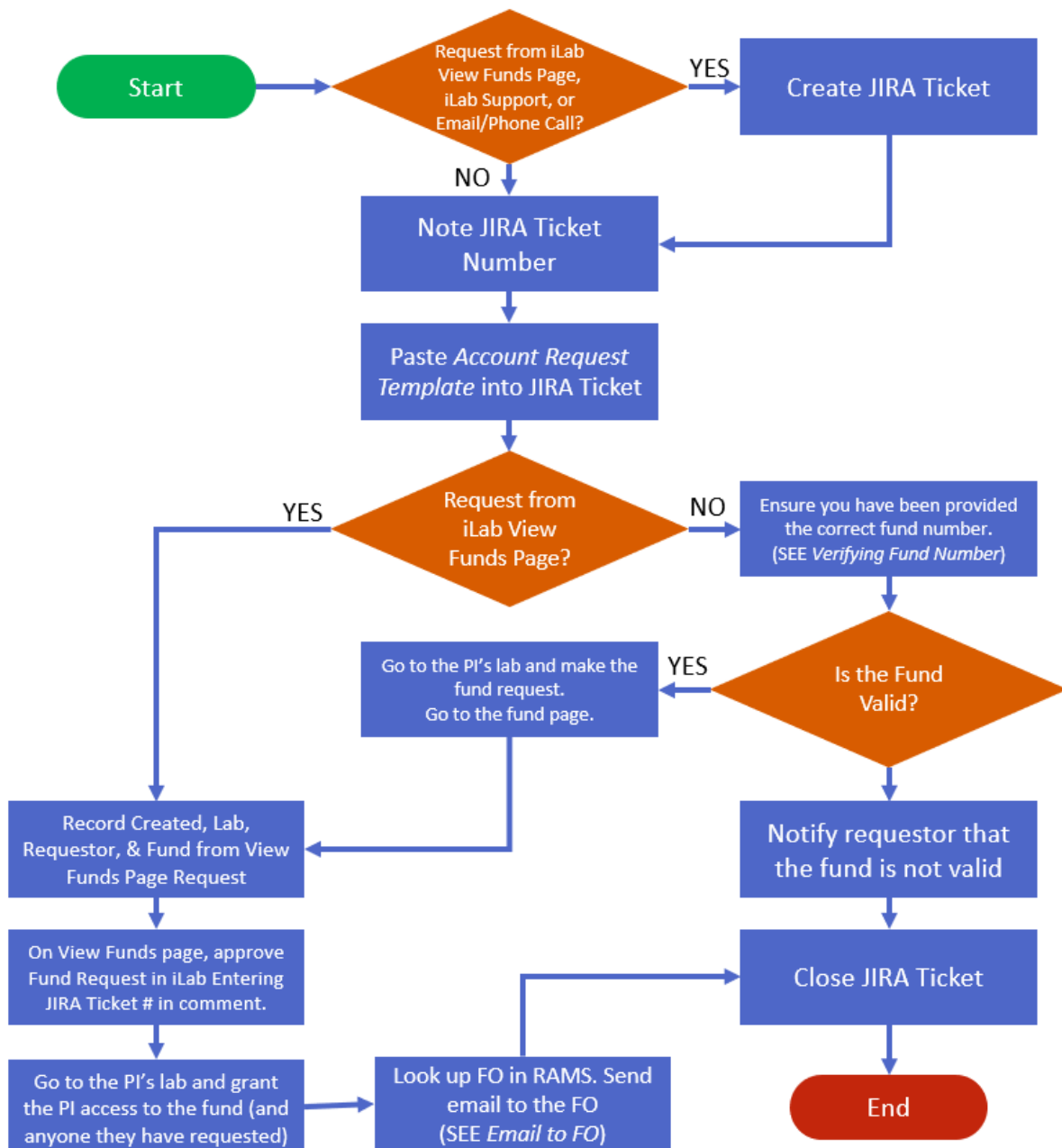
Low

A user (iLab user, PI, Financial Administrator, Core) requests a fund to be added to a PI's lab.

Request can originate from:

- Request in iLab (Funds page)
- iLab Support Request
- Email / Phone Call
- PSU CORES Help ticket/email to coreadmin@psu.edu

### How-to Flow





### Checklist to Complete

- JIRA ticket created, documented with Request Date, FO, Lab, Requestor, and Fund
- Account is requested from the PI's lab
- Account is approved, noting JIRA number
- Account is assigned to PI (and any others requested)
- Notification sent to FO
- Response to requestor, if made through Email, Conversation, JIRA ticket submission, iLab Support ticket
- Jira Ticket Closed

### Account Request Template

```
TASKS TO COMPLETE
|Complete|Description|
| |Approve Fund Request in iLab|
| |Assign fund to the PI in the PI's lab|
| |Send an update to the FO, PI, and unit if requested by a
unit|
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Created (Request date): 11 Jul '19
FO:
Lab:
Requestor: Jun Zhou (jzz174@psu.edu)
Fund (Account/CC - Desc):
*
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```

### Verifying Fund Number

Hopefully the requestor will provide the full account and cost center. If they do not, or the request in the PI's lab fails, you will need to verify the fund number to ensure you have the correct format, and the correct cost center. Often people provide the "short form" and you need to find the long form. They rarely know what the long form is, although assistants are learning the format which is decreasing tickets. Sometimes the PIs will not know their cost center. The cost center may be abbreviated, or have a spelling error. By trying to verify the format, you are able to help find the appropriate account and cost center.

#### Method 1: iLab

Search the active funds in iLab to see if you can find the correct format of the account and cost center.

Go to the Institutional Page and Navigate to the Accounts/Cost Centers section.



## iLab – Account/Cost Center Access Request

The screenshot shows the Agilent CrossLab iLab Operations Software interface. The left navigation menu is expanded to show 'Penn State University' selected (1). The 'User Management' tab is active (2). The 'Accounts/Cost Centers' option is highlighted in the section navigation panel (3).

Pending Lab Access Request	
Research Groups	
Departments	
Organizations	
Membership to Institution	
Partner Institutions	
Accounts/Cost Centers	

Pending Lab Access Request	
Date	
COLBY, RAL	
Jul 10, 2019	
FREEMAN, I	
Jul 09, 2019	
HAYES, DAN	
Jul 15, 2019	
MARANAS,	
Jul 08, 2019	

1. From the left menu, select **Penn State University**
2. Select the **User Management** tab
3. Select **Accounts/Cost Centers** from the section navigation panel

Enter in the account, or part of the account number, OR the cost center or part of the cost center. The list will auto-filter down to the accounts/cost centers that have a match. NOTE: You cannot search for both the account and the cost center using the format account/cost center.



## iLab – Account/Cost Center Access Request

Summary of Cores | User Management **11** | Billing \* | Reporting \* | Settings

Pending Lab Access Request  
Research Groups  
Departments  
Organizations  
Membership to Institution  
Partner Institutions  
Accounts/Cost Centers

1Globe Health Institute  
1st Choice Seeds  
206 Ortho  
21st Century Medicine, Inc.  
25.2 Solutions

\* You can select multiple institutions using Ctrl or Shift

### Accounts/Cost Centers

HALLOWEEN

Accounts/Cost Centers	Status	Created On	Updated On	Expires On	Lab
0504660 UP10010/HALLOWEEN - CHILDREN'S HALLOWEEN TRAIL	active	/17	07/09/19	12/31/99	Not in any lab

Account/Cost Center

1. Search for the account or cost center (or parts of them)
2. Note the correct account and cost center, provided in the format, account/cost center.
3. Check to see if the status is Active. Inactive funds cannot be used.

You can copy the account/cost center to your clipboard to paste in the appropriate fields on the PI's page when requesting the account.

Method 2: RAMS (if you are listed as an administrator in RAMS)

Go to RAMS at <https://rams.psu.edu>

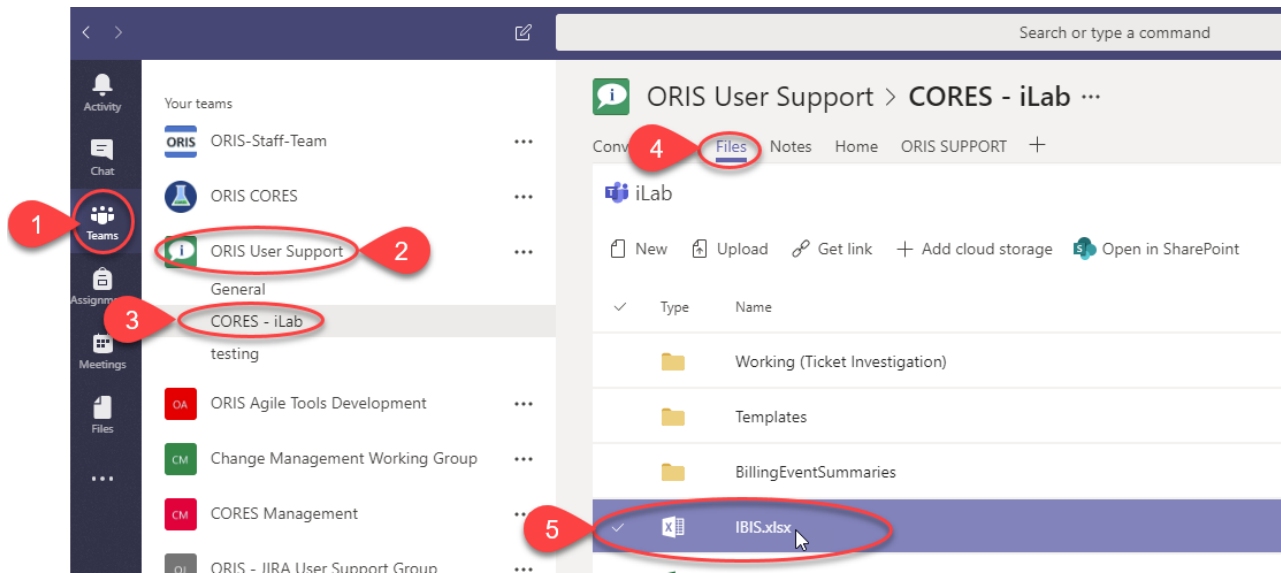
**\*\*\*NOTE\*\*\* NOT CURRENTLY LOADING**

Method 3: IBIS File

In Microsoft Teams, you can access an Excel file that reads the latest IBIS COA and CCTR files. From this excel file, you can search and hopefully find the account and cost center you are looking for. On the account page, you can look at the Hold Close Date column to determine if an account and all associated cost centers are still valid. If this date is earlier than today, they will not be valid.



## iLab – Account/Cost Center Access Request



1. In Teams, go to **Teams**
2. Go to the **ORIS User Support** team
3. Go to **CORES – iLab**
4. Select the **Files** tab
5. Open the **IBIS.xlsx** file

The COA and CCTR tabs contain the information from the corresponding files from IBIS. The COA file tab contains the Chart of Accounts, and the CCTR file contains all of the cost centers that are associated with the specified account.

The FO for a fund is on the **COA** tab in the **FO User ID** column.

The Expiration date we are using for a fund can be found on the **COA** tab in the **Hold Close Date** column.

Method 4: Ask the Requestor to ask their Financial Analyst or FO.

You may not be able to find or narrow down the options far enough to figure out the correct account and cost center. In this case you should ask the requestor to ask their Financial Analyst or FO for the full form of the account and cost center.

### Email to FO

Send the following email to the PO. You can combine multiple requests into one email in order to not overwhelm the FO. Make sure none of the font remains colored red.

### SPECIAL INSTRUCTIONS:

- If the request is going to the FO Marc Startoni (MQS7), only send to Erlee Myers (ehm3).

### Subject

iLab Account Request Approval



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## iLab – Account/Cost Center Access Request

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Message Body

Hello <insert name here>,

As the fund owner as listed in IBIS, Penn State's Financial System, you are being notified of a request to grant access to the account and cost center as noted below for use in iLab.

The listed PI has been granted access to this account. Please let us know if this is not correct. If this is correct, no further action is required.

**PI:** <insert name>

**Requestor:** <insert name (email)>

**Account/Cost Centers:**

- <Insert account/cost center description>

Thank you,

<Insert your name here>

### **CORES**

Core Services

Office for Research Information Systems (ORIS)

coreadmin@psu.edu

### ***iLab Support***

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#### **FUND ISSUES**

**iLab Support Websites**

**Submit a ticket to [Penn State CORES iLab team](#)**

[Agilent's iLab Help Site](#)

[Penn State iLab Training Site](#)

[Penn State CORES iLab Website](#)

**Submit Support Question or Ticket**

[Penn State CORES iLab team](#)

Clicking on the [HELP](#) link in the upper right corner within iLab

**Email Agilent iLab Support** at [ilab-support@agilent.com](mailto:ilab-support@agilent.com)

**Phone Agilent iLab Support** at [1-800-690-2957](tel:1-800-690-2957)

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