

## Adding or Updating Funding Accounts in iLab:

1. From your iLab account page, go to “Manage Groups”, “My Groups”, and click on your lab.

Agilent CrossLab | iLab Operations Software

home  
communications (0)

core facilities  
my cores  
my centers  
list all cores  
invoices

reporting  
manage groups  
my groups  
my cores  
people search

Translational Research Initiatives in Pathology (TRIP)

Translational Research Initiatives in Pathology  
Translational Science BioCore-BioBank (UW Madison) Lab

SAPERIOSTAINS

2. Click on the “Membership Requests & Projects” tab

Agilent CrossLab | iLab Operations Software

system upgrades (Feb, 2018)

Search cores and

home  
communications (0)

core facilities  
my cores  
view requests  
my centers  
list all cores  
invoices

reporting  
manage groups  
my groups  
my cores  
people search

Translational Research Initiatives in Pathology

Membership Requests & Projects | Members (9) | Budgets

Membership Requests

✓ No Access Requests require approval

Manage Projects

There are no Projects for this lab. Please contact:

- [ilab-support@agilent.com](mailto:ilab-support@agilent.com)

Manually add a new Project

Manage Projects

<

© Agilent Technologies, Inc. 2018

3. Click on “Manually add a new Project” to add a new funding string.
4. Enter all applicable fields (instructions with examples are given), and hit “Add”

core facilities  
my cores  
view requests  
my centers  
list all cores  
invoices

reporting

manage groups  
my groups  
my cores  
people search

Membership Requests & Projects Members (9) Budgets Bulletin board (0) Group Settings

### Membership Requests

✓ No Access Requests require approval

### Manage Projects

There are no Projects for this lab. Please contact:

- [ilab-support@agilent.com](mailto:ilab-support@agilent.com)

▼ Manually add a new Project

Your funding string should be entered using the following format:

Description - (optional) - You may enter a description to suit project for your records.  
 Department - (required) - Enter 6 digits, no dashes. Examples: 700987, 780065.  
 Fund - (required) - Enter 3 digits. Examples: 144, 355.  
 Program - (required) - Enter "4"  
 Project - (required) - Enter a 7 alphanumeric characters, no dashes. Examples: PRJ99AB, AAA1243.  
 Account - Leave Blank. (Default populated by iLab)  
 Fund Class - Leave Blank. (Default populated by iLab)

Description	Department	Fund	Program	Project	Account	Fund Class
Start up funds	536300	144	4	PRJ45NM		

Project: 536300-144-4-PRJ45NM--

► Manage Projects

5. Under “Manage Projects” in the Customize Project Grid, assign who from your lab can access funding strings by clicking the checkbox that corresponds to the user and funding string. In the example below in red, Everlyne has access to the funding string 533417-136-PRJ431P.

reporting

manage groups  
my groups  
my cores  
people search

### Membership Requests

✓ No Access Requests require approval

### Manage Projects

► Customize Project Grid

Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

Filter Project numbers

Filter Members

Name	Default Project	533417-136-PRJ431P
Kristina Matkowskyj	None	<input type="checkbox"/>
Ricardo V Lloyd	None	<input type="checkbox"/>
EVERLYNE NKADORI	None	<input checked="" type="checkbox"/>
Joe Cavanaugh	None	<input type="checkbox"/>
MARK MCCLINTOCK	None	<input type="checkbox"/>
VICKIE MARTORELLI	None	<input type="checkbox"/>
Erin Baldwin	None	<input checked="" type="checkbox"/>
TOSHI KINOSHITA	None	<input checked="" type="checkbox"/>

Showing 1 to 8 of 8 entries

First Previous

## Hiding Funding Accounts in iLab:

1. To hide a funding string that is expired or should no longer be used, remove access to that funding string from everyone in the lab. Do this by unchecking all the boxes under that funding string. If that funding string is still being used for pending charges, you will see the below pop-up asking you to choose a new funding string for those charges. Select a new funding string from the "Project" drop down, then click the "Update all Service requests/Reservations listed above" hyperlink.

Can not remove DAGNA SHEERAR's access to Project 533400-136-1362094 because it is the Project of record for the following services:

Not billed charges on service requests which use this fund: [TSBC-BB-DS-5](#)

Not billed charges on service reservations which use this fund: [BD FACS Aria "Jack" \(logged time\)](#)

[▲ Forward Scatter PMT Testing](#)  
[- Cell Sorting - Assisted Use \\$94.25/hr - DAGNA SHEERAR, \(6082630313\) - \(Admin \(UW Madison\) Lab\) - \(Unconfirmed\)](#)

Not completed Service Requests which have this fund in their default payment information: [TSBC-BB-DS-5](#)

Not completed Service Reservations which have this fund in their default payment information: [BD FACS Aria "Jack" \(logged time\)](#)

[▲ Forward Scatter PMT Testing](#)  
[- Cell Sorting - Assisted Use \\$94.25/hr - DAGNA SHEERAR, \(6082630313\) - \(Admin \(UW Madison\) Lab\) - \(Unconfirmed\)](#)

Please update the Project for these services / reservations.

Alternatively, you can choose to use another Project instead for all of them:

Project:

[Update all Service requests / Reservations listed above](#)

2. Once all access has been removed for that funding string, expand the "Manage Projects" section and find the project you will hide. Change the status of that funding string to "hidden". If the hidden status is not available and you've confirmed that all access to that funding string has been removed, try refreshing your browser and try changing the status again. **Do not delete the account by clicking the red X if it was used to pay for any services as it may interfere with future reporting.** You may delete an account if it was never used (i.e. entered incorrectly).

Project	Status	Delete
073086-136	active	
213123-144-prj1234	hidden	
533400-136-1362094	active	X
539300-133-AAB3277	hidden	X