

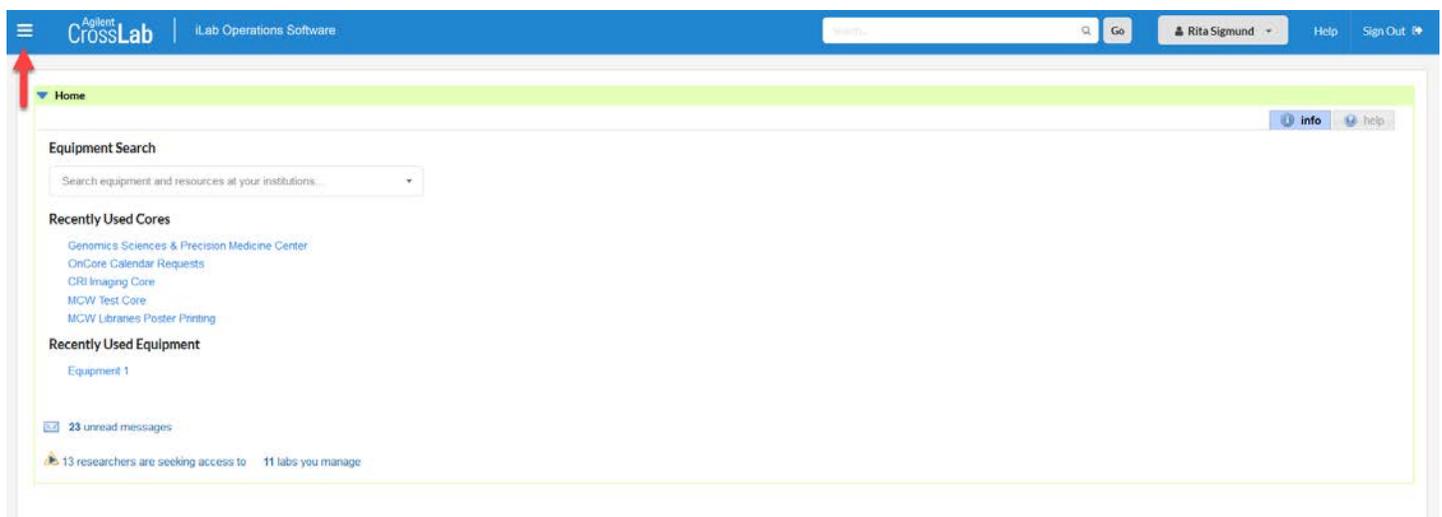
iLab Payment Account Instructions for Financial Managers

How to assign accounts at a department level and link those accounts to users at a “(MCW) Lab” level

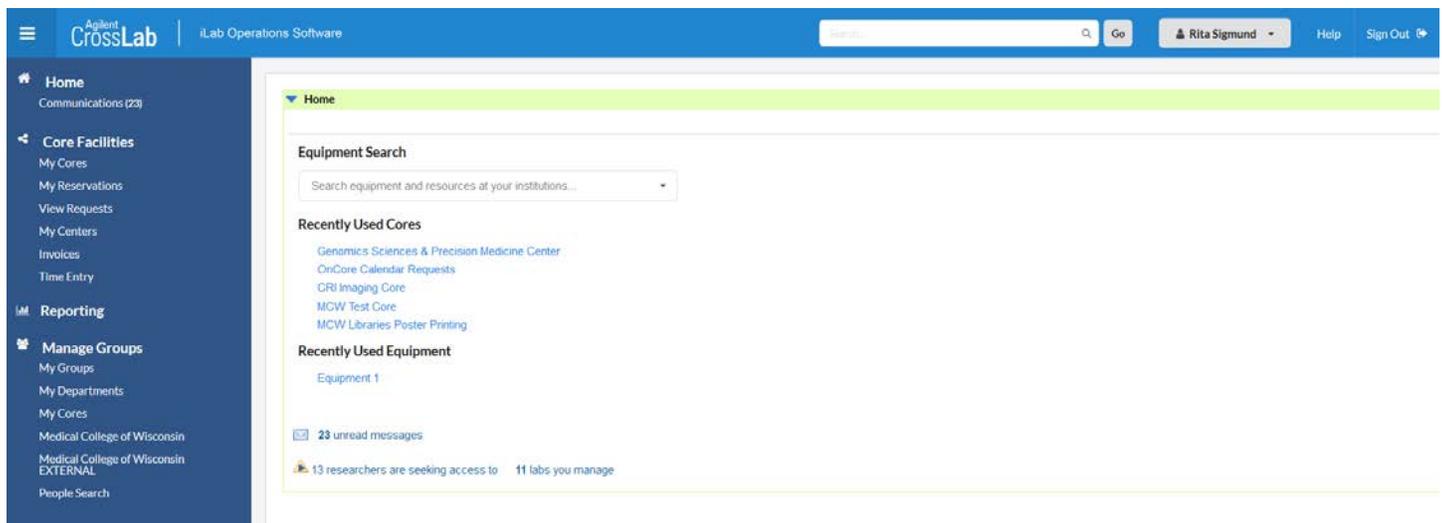
There is a link to iLab on InfoScope.



Log into iLab using your MCW credentials. The landing page will display a navigation button (Arrow points to “hamburger” icon) that you need to select to reveal the menu.



As Departmental Financial Managers, the blue menu leads to pages you have been given access to by the Institutional Admins at the Office of Research iLab Support. “My Departments”/ “My Groups” will contain lists you are responsible for.



iLab Payment Account Instructions for Financial Managers

How to assign accounts at a department level and link those accounts to users at a “(MCW) Lab” level

The Department of Research Office will be used as an example “My Department” for navigation. The department level Financial Managers listed on this page have access to all the active program accounts that are uploaded to Oracle each night. With proper Oracle security clearance, these individuals may also submit GL accounts to Oracle. (Divisional contacts can have access however, they will have to be added as financial managers for each lab in their division.)

Arrow: Select the **Projects or General Ledger Accounts** tab to open the list of departmental accounts.

Department Name: Research Office

Groups Members Settings **Projects or General Ledger Accounts** Reporting

Manage administrator and staff access

Add additional members from your institution by searching for first and last name:
start typing the name of

current managers and employees

Name				
Kathleen Holewinski	Department level financial managers	kholewinski@mcw.edu	414-955-8738	
Lynne Prost		lprost@mcw.edu		

The filters on the left can be used to search accounts by typing in the fund number or by opening additional search criteria (expand by clicking on the small black triangle). The NOTE refers to an action that will create an “artificial” account that Oracle will not recognize and is not functional for payment using iLab. Only active accounts that are uploaded each night by Oracle should populate this page. (GL accounts/natural accounts will have to be submitted via Oracle by a departmental security approver before they will appear in the list.)

Department Name: Research Office

Groups Members Settings **Projects or General Ledger Accounts** Reporting

Hide Filters

NOTE: Never use this button to create an account Add a New Project or General Ledger Account

Displaying 30 out of 41 results. (Page 1 of 2)

Name	Description	Owner	Status	Total amount	Expires	Assign	Actions
1091	██████████ FY19-20 NATTINGER	Research Office (1021428)	Active	click to edit	Jun 30 '21	<input type="text" value="Henk, Lisa (MCW) Lab"/>	
5520	██████████ Research Office	Research Office (1021428)	Active	click to edit	Apr 30 '24	<input type="text" value="Nattinger, Ann (MCW) Lab"/>	
0004-00155-030	██████████ Biomedical Resource Center	Research Office (1021428)	Active	click to edit	click to edit	<input type="text" value="BRC (MCW) Lab"/>	

Left sidebar filters:

- Keywords: fund number Go
- Owner: Research Office (41)
- Status: Active (38), Archived (2)
- Labs: Admin Gspmc (Mcw) Lab (1), Boggs, Kevin (Mcw) Lab (2), Ctsi Test (Mcw) Lab (1), Henk, Lisa (Mcw) Lab (1), Nattinger, Ann (Mcw) Lab (23), Prost, Lynne (Mcw) Lab (1), Sayed, Elen (Mcw) Lab (9), Senglaub, Todd (Mcw) Lab (1), Thulin, Joseph (Mcw) Lab (2)

Project accounts are automatically pulled in from Oracle nightly and are automatically assigned to the primary PI. An account can be assigned to a lab by hovering over the text box with your cursor and start to type the name of the (MCW) Lab. No further action is required.

5520	██████████ Research Office	Research Office (1021428)	Active	click to edit	Apr 30 '24	<input type="text" value="Nattinger, Ann (MCW) Lab"/> <input type="text" value="Admin (MCW) Lab"/>	
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Admin (MCW) Lab will be used as an example of a “My Group” for navigation of how to link accounts to members of a (MCW) Lab. **Remove/Add Groups:** **Remove a Group** (Arrow points to red X), **Add an existing Group** (search for name of the Group in the box and proceed with blue arrow)

Department Name: Research Office

Groups Members Settings Projects or General Ledger Accounts Reporting

Group Name	Approval Amount	Primary Contact	Actions
Senglaub, Todd (MCW) Lab	\$500.00		 
Sayed, Ellen (MCW) Lab	\$500.00		
Hattlinger, Ann (MCW) Lab	\$500.00		
Prost, Lynne (MCW) Lab	\$500.00		
Thuin, Joseph (MCW) Lab	\$500.00		
Admin (MCW) Lab	\$500.00	Ashleigh Sanchez	

Search for a Group:

The default landing page for a (MCW) Lab is the Members tab. The individuals listed on this page have all registered for iLab and selected this Group for membership. **Remove/Add Members:** **Remove a Member** (Arrow points to red X), **Add an existing Member** (by starting to type the name of a registered user and select “invite” prompt), **Change status of a Member** (by selecting the “pencil” icon) and making sure to select **SAVE**.

Admin (MCW) Lab

Membership Requests & Projects or General Ledger Accounts **Members (7)** Budgets Bulletin board (2) Group Settings

Lab-wide approval settings

Click the pencil icon next to the person below whom you would like to make the financial approver.

Default auto-approval threshold: \$ 500.00 

Cost overage buffer: \$ 100 

 save approval settings

Lab members and settings

Lauren James	Lab default (\$500.00)	ljames2@mcw.edu	414.955-4410	   
Leanne Harmann	Lab default (\$500.00)	lharmann@mcw.edu	414-955-6817	  
Lisa Henk	Lab default (\$500.00)	lhenk@mcw.edu		  
Marie Ellestad	<input type="text"/>	<input type="text" value="mellestad@mcw.edu"/>	<input type="text" value="414-955-3216"/>	<input type="text"/>  <input type="text"/>  <input type="button" value="save"/> <input type="button" value="cancel"/>

 link existing user

Add an existing user

Invite additional members to this group

(Start typing the name of the user)

Department managers

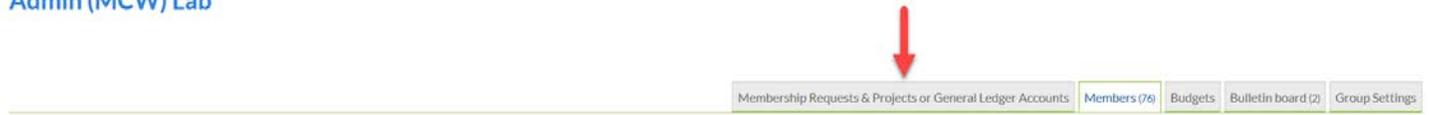
Name	Email	Phone
Kathleen Holewinski	kholewinski@mcw.edu	414-955-8738
Lynne Prost	lprost@mcw.edu	

iLab Payment Account Instructions for Financial Managers

How to assign accounts at a department level and link those accounts to users at a “(MCW) Lab” level

Select the **Membership Requests & Projects or General Ledger Accounts** tab to open the list of accounts assigned to the **Admin (MCW) Lab**.

Admin (MCW) Lab



Lab-wide approval settings

Click the pencil icon next to the person below whom you would like to make the financial approver.

Default auto-approval threshold \$ 500.0
Cost coverage buffer \$ 100

save approval settings

Lab members and settings

Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date	End Date	
Amanda Casey	Lab default (\$500.00)		amanda.casey@ilabsolutions.com	123-456-789			
Ashleigh Sanchez	Lab default (\$500.00)		asanchez@mcw.edu				

The **department assigned accounts are automatically populated on this page**. Check the boxes to link the Member of the lab with the desired account. (Requests for core services will have to be made after activation dates and before expiration dates or the project account cannot be used).

Admin (MCW) Lab



Name	Default Project or General Ledger Account	789	CA-2211308-2520020 (1,000.00)	None
Amanda Casey	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ashleigh Sanchez	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rita Sigmund	..	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Common Payment Account Billing Errors related to this workflow:

1. An individual is no longer assigned to a Group as a member but submitted a request to a core in the past as part of a group. Prematurely removing a member from a lab before an invoice is completely processed will cause a billing error.
2. An individual is a current member of a group but access to a payment account is denied because the box linking the member to the account is not checked.
3. A department payment account assigned to a group has expired

For inquiries contact ilab@mcw.edu