# Click by Click instructions for
# Adding Account Numbers to PI labs in iLabSolutions

(for departmental managers, lab managers, and PI's)

1. Departmental Accountants, PI's, and Lab managers are the only groups who can add or delete account numbers in iLabSolutions. Please contact one of these faculty or staff members if you need account access.

2. Login to iLabsolutions https://uga.ilabsolutions.com/account/ldap/uga preferably through Firefox internet web browser. Your network ID = your UGA MyID. Meaning only type your Network ID: auser (example) NOT your email auser@uga.edu (example).
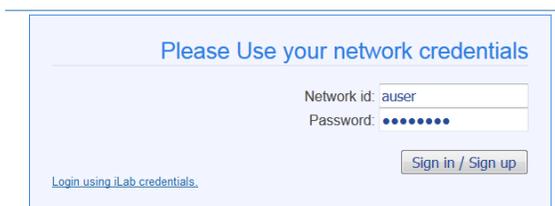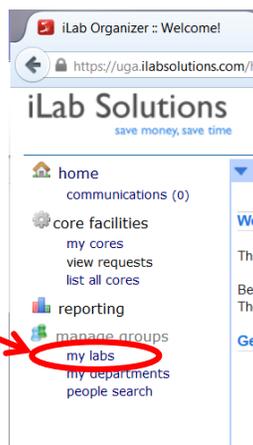

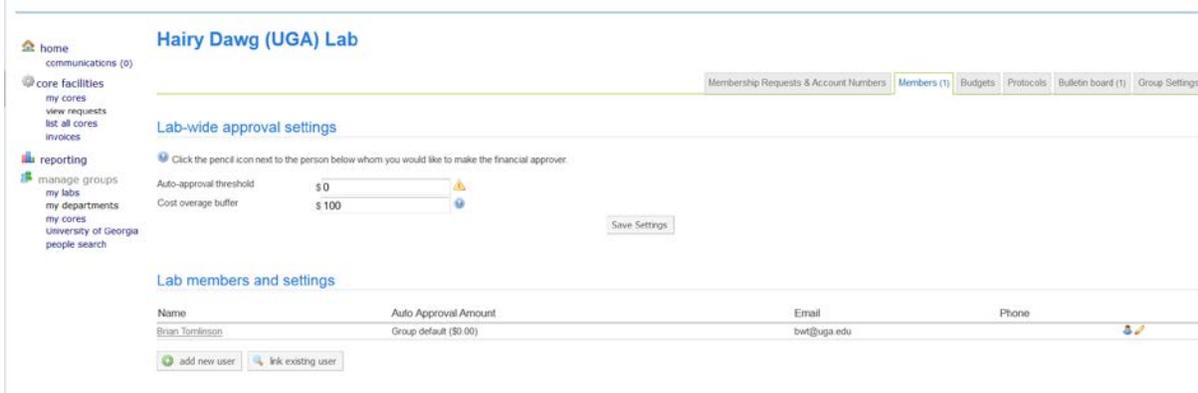3. You will be sent to your main screen as seen below.
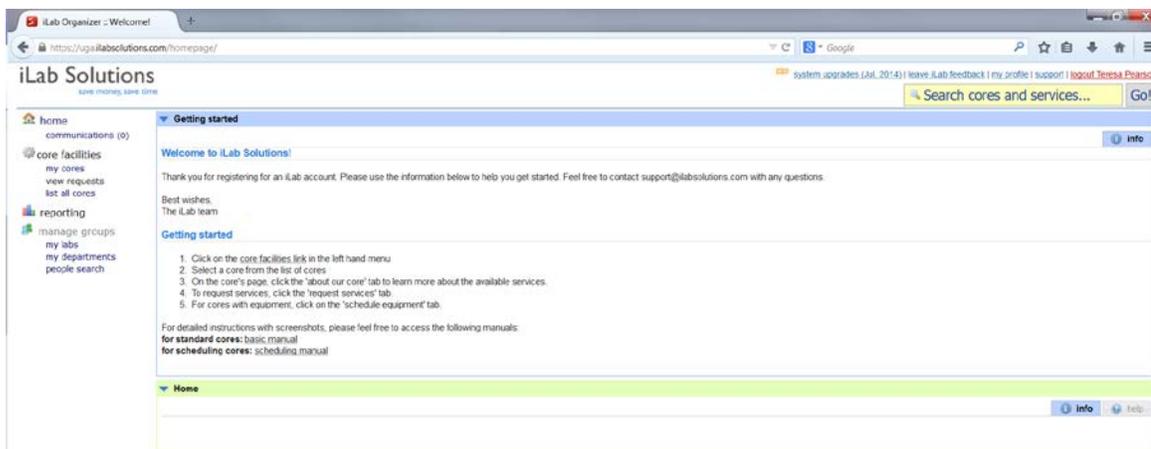
4. On the left hand side of the screen find the "my labs" link and select it

5. The departments you have access to will appear to the right of the "my labs" link. Select a lab by clicking on it with your mouse.


6. You will be taken to the "members" screen for the selected lab.


7. Once selected, the lab you chose should appear as illustrated below. Select the tab titled "Membership Requests & Account Numbers".
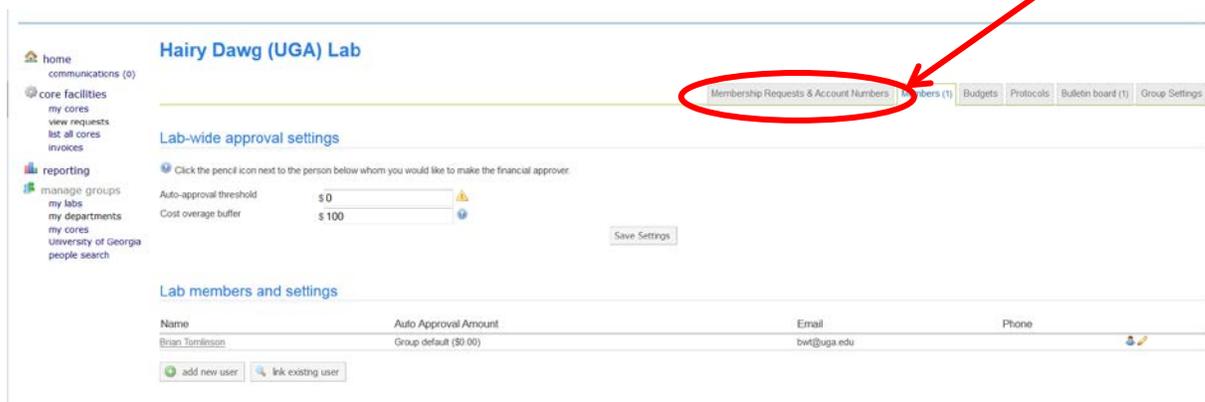
8. The "Membership Requests & Account Numbers" tab lists all the users for the lab and what, if any, accounts they have access to. Departmental admins must assign the accounts before they are ready to use. To add an account, select "Manually add a new Payment Method"
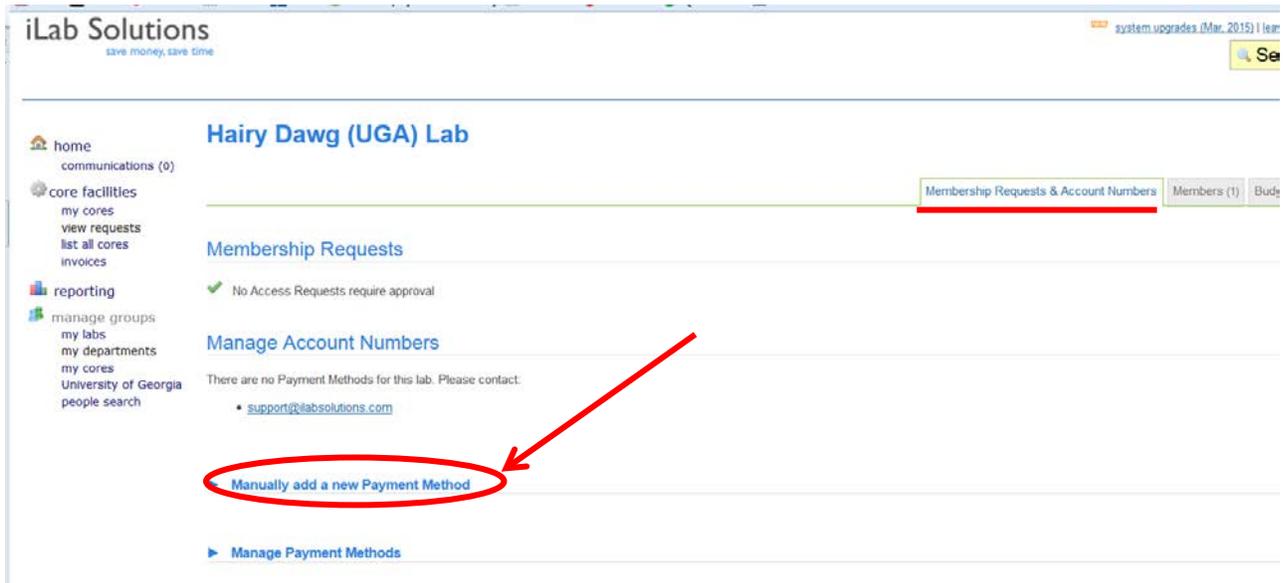
9. At the RED star titled "Payment Method" type the UGA account number you wish to assign. Only type the 12 characters in the UGA account number. Example: 1045DM269000 . No hyphens or other prefixes will be allowed. When finished typing click "ADD"
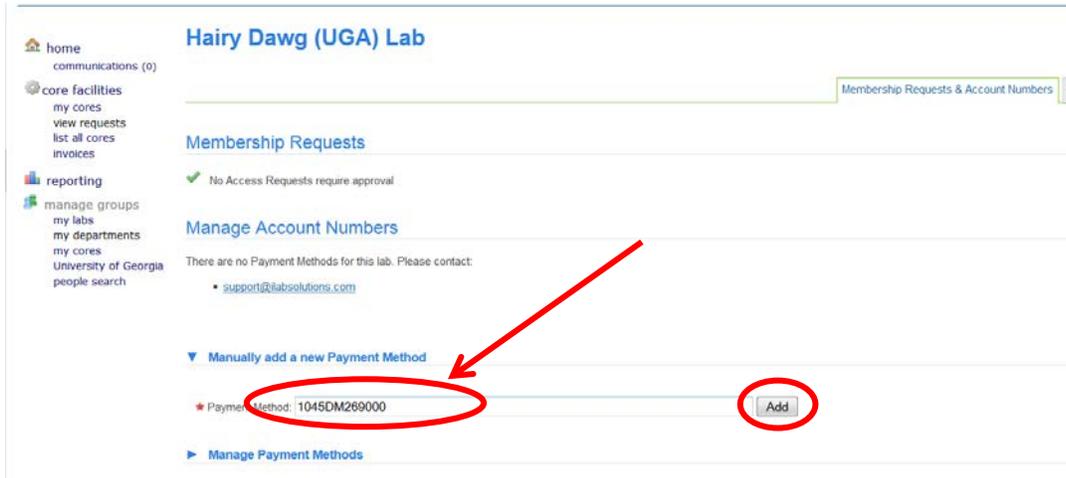
10. Once the account is added, all of the members of the lab will appear with a check box for each lab member beneath the account number heading. You can choose to add more accounts or select which lab members have access to this account.

11. If you add multiple accounts, then check boxes for each will appear by all of the lab members.

12. Check the boxes of each lab member and the accounts you want them to access. Your selections should highlight in green. <u>Click the refresh button to the right of your web address bar for changes to take effect</u>.
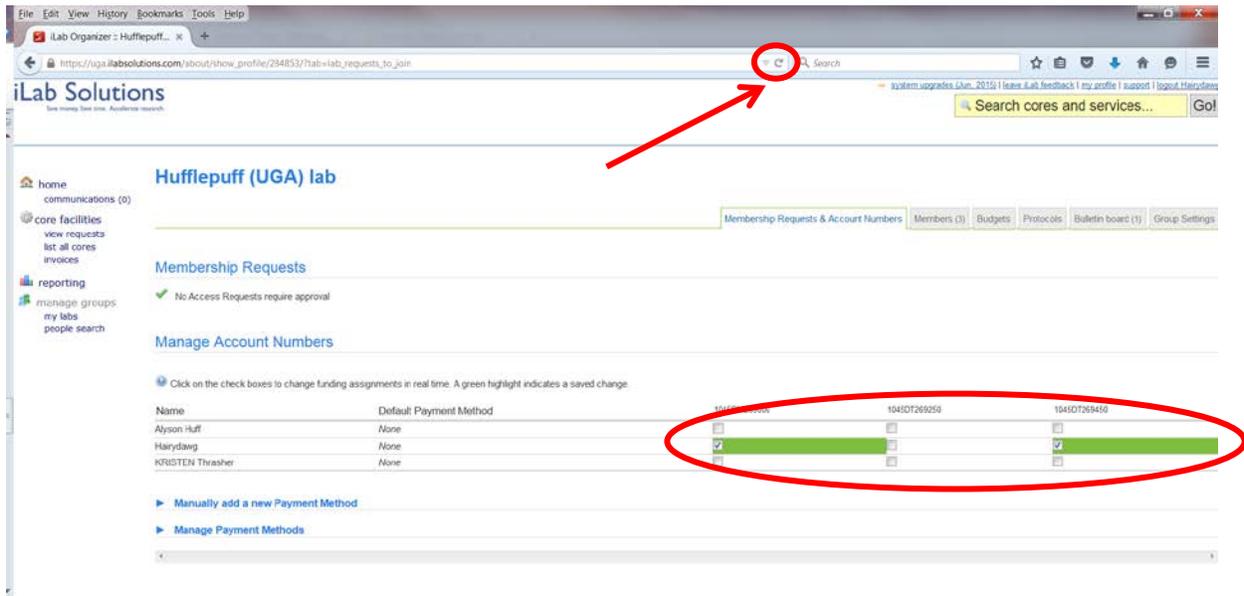

13. If you choose to delete or rename an account select the "Manage Payment Methods" title.
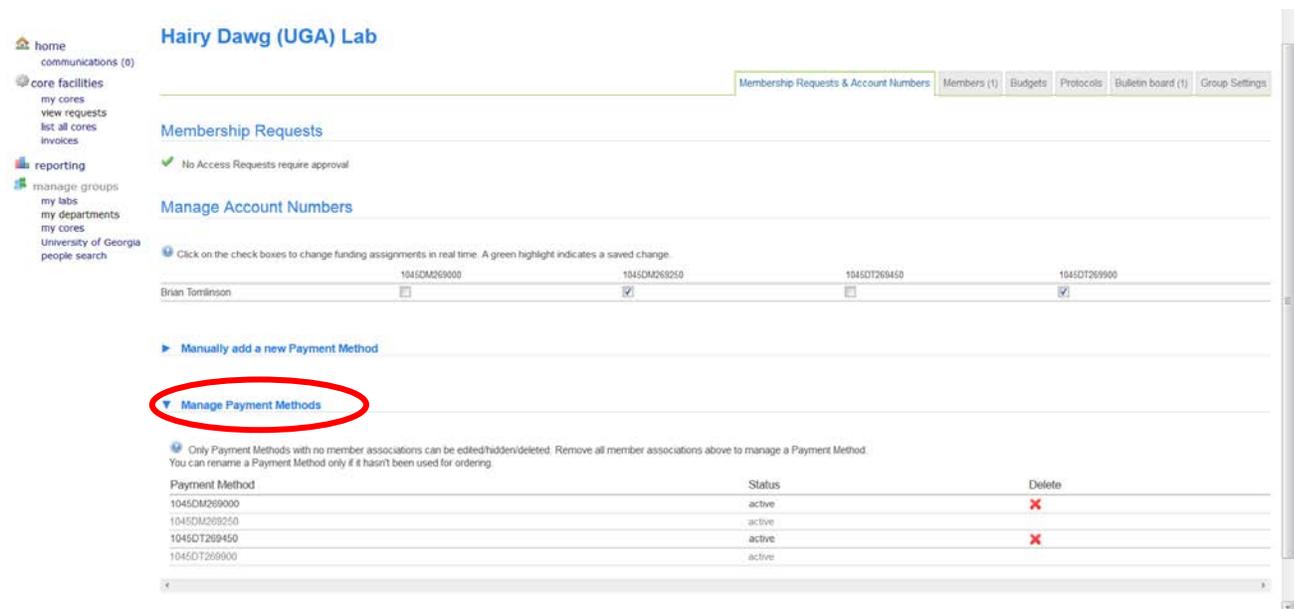

14. Accounts that are assigned to lab members can not be edited, hidden, or deleted. iLabs will not allow any of these actions as long as you have a lab member assigned to an account in this lab. You will notice above that accounts that are a shade of gray lighter are assigned accounts as to indicate they can not be hidden. Also, the 2 assigned accounts listed above that are currently active do not have a RED X in the delete column indicating that they can not be deleted.

15. **To DELETE an account** make sure no one is assigned to the account. If you unassign an account and the GREEN box appears, then you may need to go to your web address bar and click the REFRESH button so that the unassignment takes effect. Then select the RED X in the account row you desire to delete.
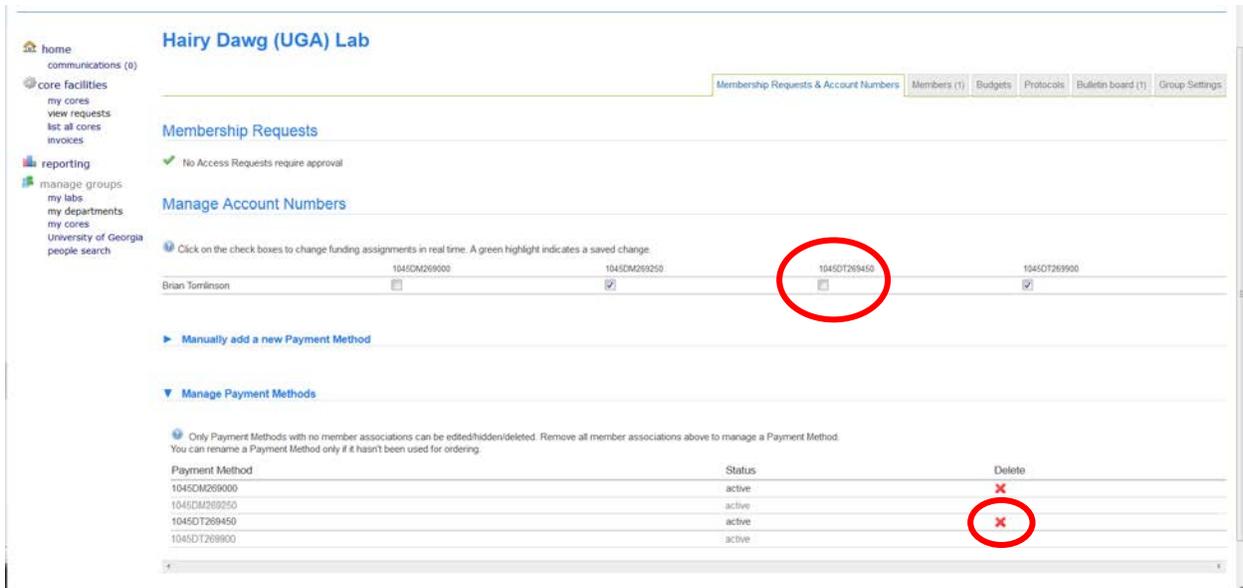
16. You will be prompted to click OK to delete the payment method. Click OK to complete the deletion.
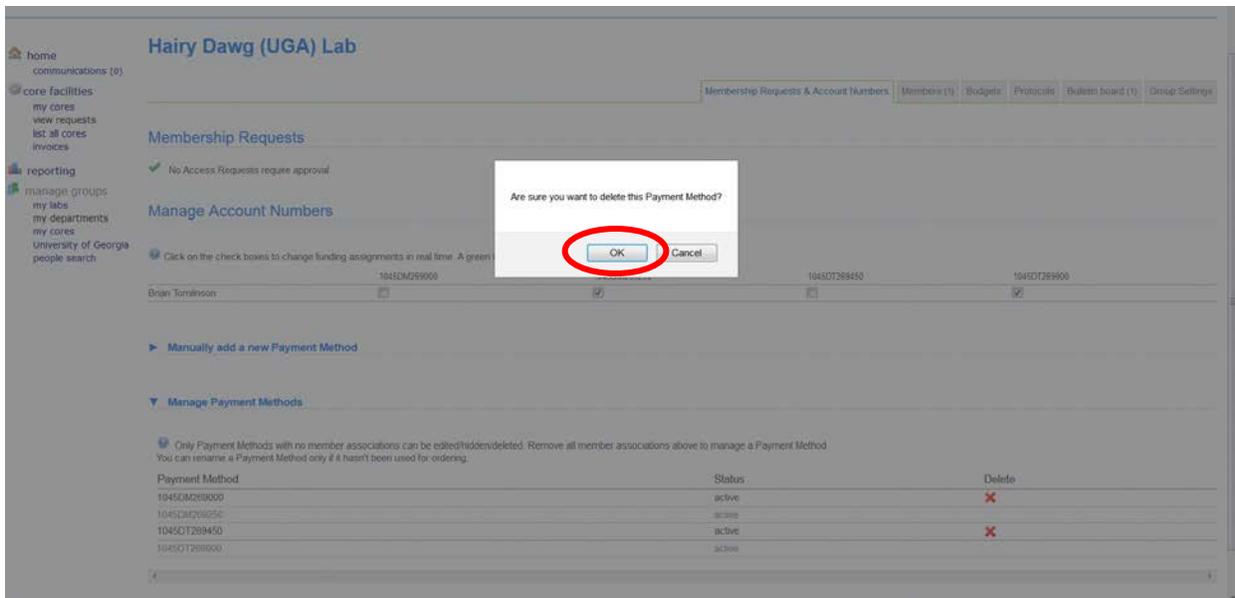
17. The account is removed from the "Member Requests & Account Numbers" tab, but you can choose to rekey the same account number if it becomes active again.