

Requesting Access to an Account (Sponsored/Non-Sponsored)

Each night, the iLab Core Facility Management system receives a nightly feed from Penn State's financial system of all restricted (sponsored) and unrestricted (non-sponsored) accounts and cost centers. For all unrestricted accounts, there is no "owner" listed in the Penn State system, and therefore, a PI that has received approval to use an unrestricted account/cost center must also receive access to that account/cost center within iLab. Occasionally co-PIs will both need to have access to a fund, but only one PI is listed as having access in IBIS. By having access granted within iLab, the PI can use this fund as payment for equipment usage and services performed by the core. Please note that iLab approval for unrestricted funds is currently happening outside of IBIS.



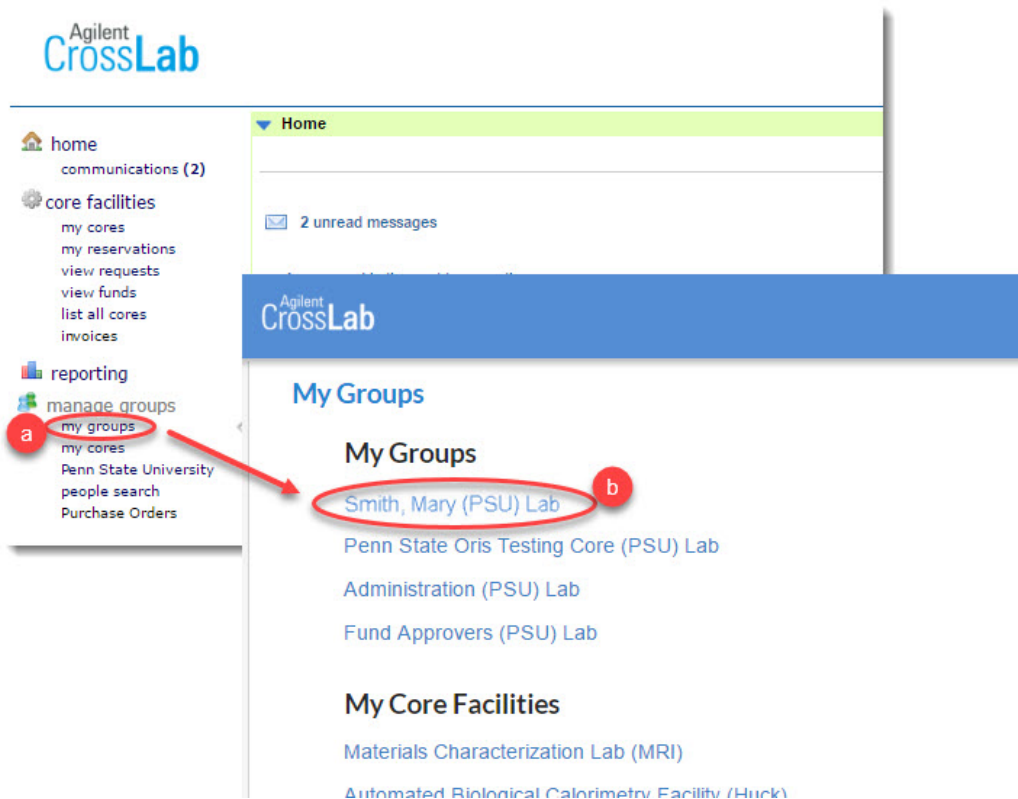
The process for requesting account access is:

1. Valid accounts and cost centers are exported from IBIS and imported into iLab on a nightly basis.
2. The PI will request access to an account and cost center (or account only) from within iLab.
3. The Fund Approver will receive notification of the account/cost center access request.
4. The Fund Approver will request access verification from the FO or PI responsible for the account/cost center. The FO or PI will confirm or deny the request.
5. The Fund Approver will approve or deny the fund access request within iLab based on the results of the access verification request.

This guide provides the steps the PI must take to request access to an account and cost center from within iLab.

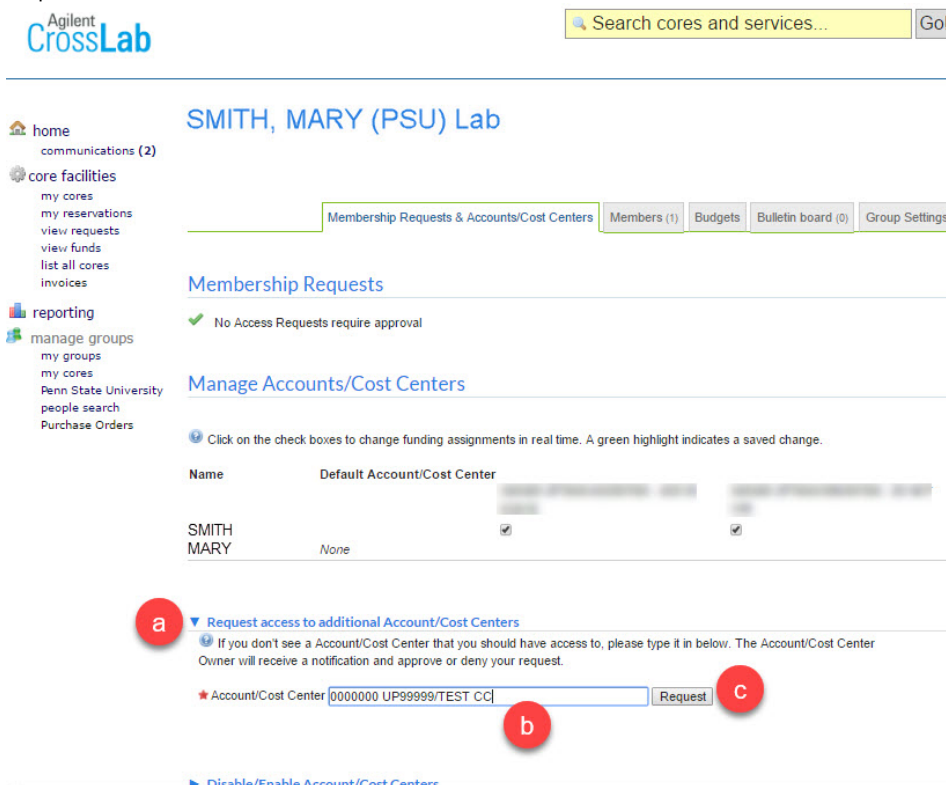
Step-by-step guide

1. Log into iLab by navigating to <https://psu.corefacilities.org>
2. Navigate to your lab.

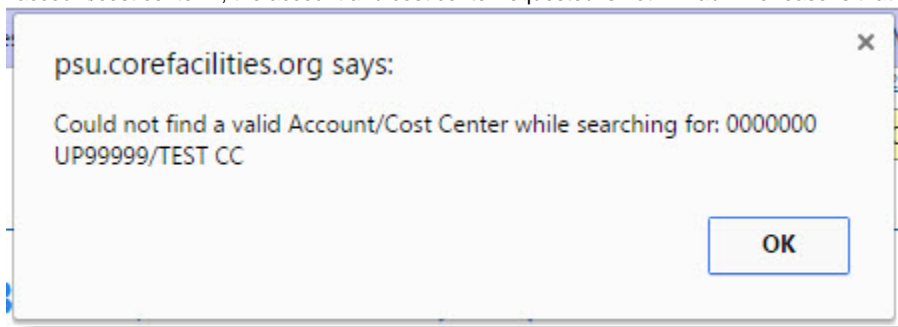


1. Select "my groups" from the left menu and
2. Select your lab as listed in the "My Groups" section of the page.

3. Request access to the unrestricted account/cost center.



1. Expand the "Request access to additional Account/Cost Centers by clicking the blue triangle on the left.
2. Type in the account and cost center that you are requesting access to.
NOTE: The account and cost center MUST BE FORMATTED as the account/cost center. You MUST have correct capitalization and there MUST be a forward slash between the account and cost center.
3. Click the Request button.
4. If you receive the following pop up that says "psu.corefacilities.org says: Could not find a valid Account/Cost Center while searching for: <account/cost center>", the account and cost center requested is not in iLab. The reasons that you may receive this error are:



1. There is a typo in the fund requested.
2. The fund has not yet been created in IBIS.
3. The fund has been created in IBIS today, but has not yet been transferred to iLab.

- Once access to a fund has been successfully requested, a grid will appear below the request box under the "Request access to additional Account/Cost Centers" section. This will list accounts and cost centers that you have been granted access to. If the request has been approved, you will see the status "approved" in the "Status" column.

▼ Request access to additional Account/Cost Centers

🔔 If you don't see a Account/Cost Center that you should have access to, please type it in below. The Account/Cost Center Owner will receive a notification and approve or deny your request.

★ Account/Cost Center

Your Account/Cost Center requests:

Account/Cost Center	Requested on	Status	Owned by	Resolved on	Resolved by	Notes by Account/Cost Center Owner	Archive request
9999999 UP00000/TEST CC	Aug 23 '17	approved	Jane Doe	Aug 23 '17	Jane Doe		
9999999 UP00000/TEST CC2	Aug 22 '17	approved	Jane Doe	Aug 22 '17	Jane Doe	Notice received from Sherry Yocum & Carla Rossi 8/22/17	

Remember: When typing the account and cost center you MUST type the account, forward slash, and then the cost center.

Example: 999999 UP99999/COST CENTER

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