

Lab Management - Requesting Agreements for External Accounts

Go to labs.ncsu.edu

Student Steps

Select the 'Request New Agreement' button



Agreements

Request New Agreement

Complete the following information:

- Facility
- Comments to PI (optional, but recommended)
- PI
 - Search by Name or Project ID. Highlight the PI row, then select the 'Send Agreement Request' button.

An email will be sent to the PI that was selected with instructions (see next step) for completing the agreement.

Select Facility

Comments - Additional details for the PI.

Select Principal Investigator / Business Officer

Instructions:

- 1) Search for the PI or Business Officer
- 2) Highlight the person in the results grid
- 3) Select Send Agreement Request button

First Name

Search

Reset

Last Name

Project ID

Send Agreement Request

1 to 4 of 4

Name

Email

Jack Foster

nobody@ncsu.edu.jjfoster

PI Steps:

From the request email, go to labs.ncsu.edu.

On the PI landing page, the new request will be in the Pending Agreements section.

Select the 'Select Project' button for the request to complete the agreement setup.



Pending Agreements

2

S Wang 4/21/2021

Select Project

Deny

Jack Foster 6/3/2021

Select Project

Deny

Search for the project that should be billed for this agreement. The My Projects drop-down will include all projects where you are the primary PI. Other projects can be found through the search. Either select a value from the My Projects drop-down list, or add search criteria, then select the 'Search' button to show the results list.

Highlight the project from the search results, then select the 'Create Agreement' button.

Requestor: Jack Foster
 Facility: Materials Science and Engineering (MSE)
 Comments - (Details from the participant)
 Agreement for special research project.

Highlight the project, then select Create Agreement at the bottom of the page.

To search for your projects, enter your last name in the Lead PI search field.

My Projects 221700 Project # Search Reset
 Description PI First Name
 PI Last Name

1 to 1 of 1

Project #	Description	Start Date	End Date	Lead PI
221700	EAS INSTITUTIONAL SUPP			Jack Foster

Create Agreement

Add additional details about the agreement. Each facility may require different fields.

- Begin Date
 - First day the student can use this agreement and charge this project.
- End Date
 - Last day the student can use this agreement and charge this project.
- Total Amount
 - Total amount the student may charge to this project, during this time period..
- Description
 - Any details to help track this agreement.

Agreement Details (Required)

Agreement # 6017 Facility Materials Science and Engine Reference #

Project 221700 - EAS INSTITUTIONAL SUPP Budget Dates None listed

Primary Investigator Aram Amassian

Start date End date

Beginning date for reservations and billing. *Last date for reservations and billing.*

Total Amount 0.00

Description

The student making the agreement request will already be added to the Participant list. To add additional students, search for the student, highlight them in the results grid, then select the 'Add Selected to Agreement' button.

Assigned Participants

Search for Participants to Add to this Agreement

Add Internal (NCSU) Add External Customers

Students who are currently tied to this agreement are listed in the list to the right. If you wish to add additional students to this agreement, search below for those students, then select the 'Add Student to Agreement' button.

First Name Last Name
Unity ID Student ID

1 1 of 1

Name	Unity ID	Emplid
Jordan Dale Boyle	JBOYLE	001019874

Participants Assigned to This Agreement

Jack Foster: nobody@ncsu.edu,jfoster

Select agreement to the 'Term and Conditions toggle', then select 'Save'.

I agree to the terms and that all rates are subject to change:

After saving this agreement, the student will be notified the agreement is now active.