Lab Management - Requesting Agreements for NC State Accounts

Go to labs.ncsu.edu

Student Steps

Select the 'Request New Agreement' button

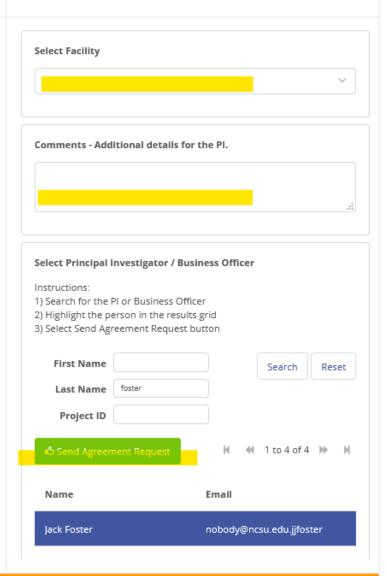
Agreements

16 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 '<u>Send</u> <u>Agreement Request</u>' button.

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

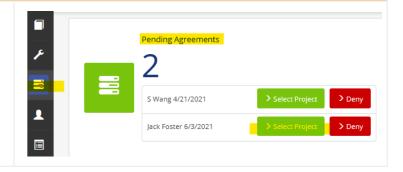


PI Steps:

From the request email, go to <u>labs.ncsu.edu</u>.

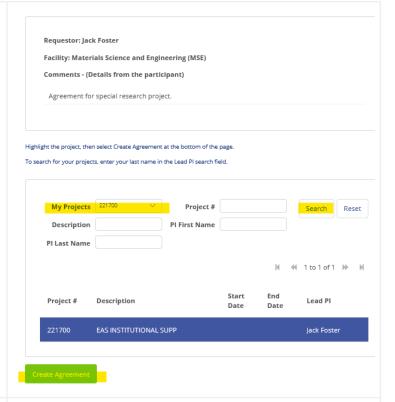
On the PI landing page, the new request will be in the Pending Agreements section.

Select the '<u>Select Project</u>' button for the request to complete the agreement setup.



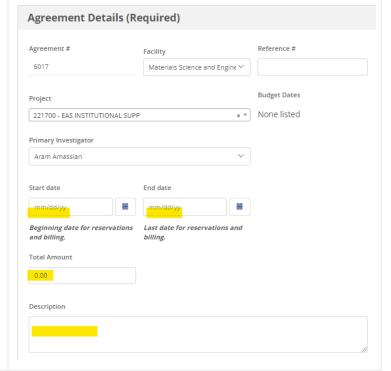
Search for the project that should be billed for this agreement. The <u>My Projects</u> drop-down will include all projects where you are the primary PI. Other projects can be found through the search. Either select a value from the My Projects drop-down list, or add search criteria, then select the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

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

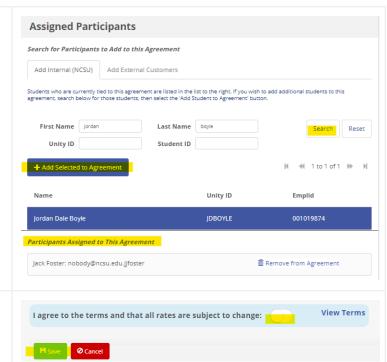


Add additional details about the agreement. Each facility may require different fields.

- 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.



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.



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

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