

iLab Core User Guide

System Role: Core User
VUMC Office of Research

Guide Contents

Registering For iLab.....	2
Instructions for VUMC PIs, Lab Managers, and Lab Members	2
Lab Group Management	4
Accessing & Navigating your Lab Group(s)	4
Lab Group Roles	6
Spending Thresholds and Approval Requirements per Lab Group.....	6
Department Administrators.....	6
Billing Number Management.....	7
VUMC Billing Numbers.....	7
VU Billing Numbers	9
Vouchers	10
Scholarships	12
How To: Request Services	13
Requesting Services	13
Approving a Request.....	15
How To: Request an Equipment Reservation	17
Invoice Review	21
Reporting.....	22

Registering For iLab

Instructions for VUMC PIs, Lab Managers, and Lab Members

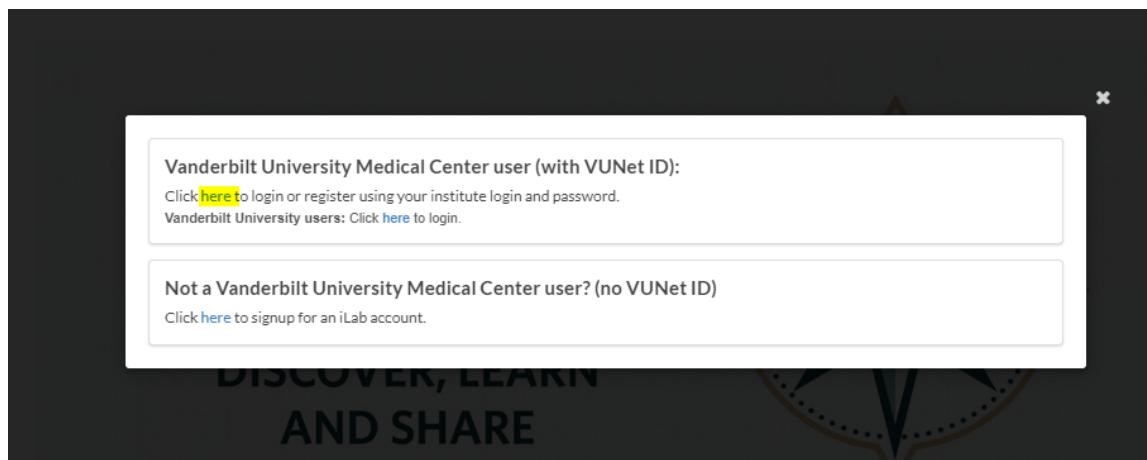
VUMC Users (PIs, Lab Managers, & Lab Members) **must register for an iLab account** before being able to access VUMC Cores in the iLab System.

Once registered, All Vanderbilt University Medical Center (VUMC) users will use their VUNet ID and ePassword to access the application.

Account registration for First-time Users

If you've not logged into iLab before, you'll need to register. To register, complete the following steps:

1. Go to the iLab application here: <https://vumc.corefacilities.org>
 - a. All users will use their VUNet ID and ePassword to access the application.
2. Click the **sign-up** button in the top right corner of the screen.
3. Click the **here** link in the pop-up window under the **Vanderbilt University Medical Center user (with VUNet ID)** header.



4. A VUNet ID login screen will display.
 - a. Enter your **VUNet ID** and **ePassword**.

5. A **registration page** will open.
6. It will **pre-fill** your **first name**, **last name**, and **phone number**.
 - a. Complete any fields that have not been pre-filled
 - b. NOTE: Only use your VUMC work email address for your email in the system.
7. In the PI group drop down menu, **select the appropriate lab group**.

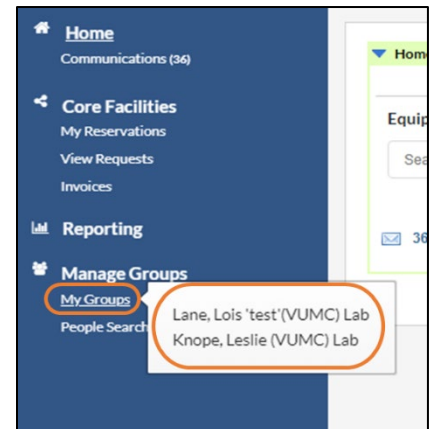
VUMC Research Staff (PI, Lab Manager, Lab Member)	<ul style="list-style-type: none"> • Select your PI's lab group. • If your PI's lab group is not listed or you are a new PI, select the AAA (Default) VUMC Lab
VUMC Department Administrators:	<ul style="list-style-type: none"> • Select the Admin (VUMC) Lab. • The Office of Research will contact you to complete your account registration.
VUMC Core Managers & Staff:	<ul style="list-style-type: none"> • Select your core director's Lab Group.
VU Students:	<ul style="list-style-type: none"> • All VU Students are assigned to VU as their home institution. Use the VU URL to access iLab. • Select the AAA (VU) Lab to register. • Contact VUMCcores@vumc.org with the name of your PI. <ul style="list-style-type: none"> ○ The Office of Research will contact you to complete your account registration.
If you are unsure what lab group, you need or you do not see your PI's Lab Group:	<ul style="list-style-type: none"> • Select the AAA Default (VUMC) Lab. • The Office of Research will contact you to complete your account registration.
<p>If you work with multiple investigators, select one Lab Group to initially set up your account. Then contact VUMCcores@vumc.org with a list of other PI names. The Office of Research will update your iLab account and grant you access to the other PI Lab Groups.</p>	

8. The Office of Research will update your iLab account and send a confirmation.
9. Click **register**.
10. **Once you register**, the a message box will display stating your account activation is pending.
11. Your account **will need to be approved**.
 - a. The Office of Research will approve requests within **24-48 business hours**.
12. **Upon account request approval**, you will be able to access and request services from VUMC cores and review invoices.

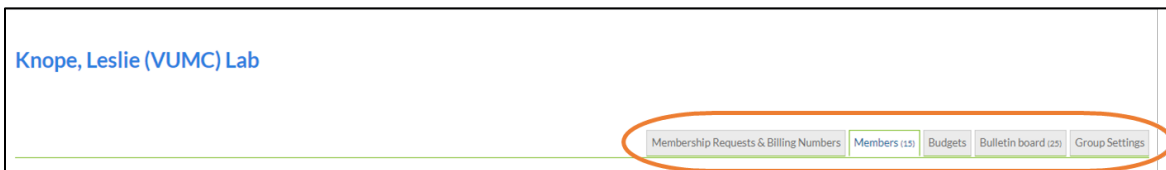
Lab Group Management

Accessing & Navigating your Lab Group(s)

To access your group, hover over the "my groups" link on the left-side navigation panel.



Navigating Within a Lab Group



Depending on your access in iLab, there are 5 function tabs within a lab group. The 2 that are utilized are:

- **Membership Requests & Fund Numbers:** Here you can, accept/reject group membership request and manage assignment of funding to group members.
 - NOTE: Only PIs and Lab Managers will be able to access this function tab.
- **Members:** Here you can manage group members.

On the members tab: lab managers and PIs will be able to add, remove, and manage memberships for the group.

Icon Key

Icon	Icon Name	Description
	Role (Person)	Hover over the person icon to display the role of the associated user. When blue, the icon is identifying PIs and lab members. The orange person icon is identifying a lab manager.
	Financial Contact	This icon indicates that the user is listed as a financial contact and will receive e-mail notifications that requires attention. The PI or any manager can approve pending requests. It also lists the user as a financial contact to Core Staff, making it easier to contact the lab when needed.
	Edit Membership	The start date for the member. If this is set for a date in the future, the member will not be allowed to request services until that date.
	Remove Member	This icon will remove a user from the lab group. NOTE: This is not the recommended way to remove a lab member. It is recommended to set an "end date" for their membership (details below in "Editing Lab Memberships").

Editing Lab Memberships

When you click the **edit membership (pencil)** icon, a pop-up will display to allow you to edit a user's membership.

Email Field	Edits the email iLab communications are set to. <ul style="list-style-type: none">This MUST be the users VUMC work email.
Core Financial Contact	This setting will enable iLab notifications for the lab to be sent to this member.
Start Date	The start date for the member. If this is set for a date in the future, the member will not be allowed to request services until that date.
End Date	The end date is the expiration of that user's membership to the group. The user will be removed from the group and unable to request services using any lab funds after that date. <ul style="list-style-type: none">If left blank, the user's membership will be indefinite.For expired users, billing of previously requested services will follow the normal billing process.NOTE: This is the recommended way to remove a lab member when they have left that group or VUMC.

Adding a New Member

To add a new member, you **must** have a **PI** or **Lab Manager** role within that group, and the new user **must** have an **existing iLab account**.

1. Within the **members** tab, navigate to the bottom of the page and click the **Link Existing User** button.
2. In the search box, type in the **user's name** and select the correct account.
3. Select their **role** (Member or Lab Manager).
4. Hit the **Invite** button.

The screenshot shows a web interface for adding an existing user. At the top, there is a button labeled 'Link Existing User' with a magnifying glass icon, circled in orange and labeled '1'. Below this is a section titled 'Add an existing user'. Underneath, there is a text input field with the placeholder 'Invite additional members to this group' and the text 'Leslie Knope - vumccores@vumc' entered, circled in orange and labeled '2'. Below the input field, the name 'Leslie Knope' is displayed, followed by a 'Can order?' checkbox and a dropdown menu showing 'member', circled in orange and labeled '3'. To the right of the dropdown are 'Start Date' and 'End Date' fields, each with a calendar icon. At the far right of the form is an 'Invite' button, circled in orange and labeled '4'.

Lab Group Roles

PI

- View available fund numbers.
 - Grant worktags – PI **automatically** has access via Workday nightly feed.
 - All other funds – PI will need to **claim** the fund. Contact your department administrator.
- **Automatically** granted access to voucher funds once activated via StarBRITE feed.
- Can grant self-access and grant lab members access to VUMC billing numbers, vouchers, and scholarships.
- Can add new individuals as a **member or manager** of the lab.
- Can view **invoices** and reporting activity across all fund sources assigned to the lab.
- Can **purchase** core services and request reservations (once fund is activated).

Lab Manager

- Can grant **self-access** or grant **lab members** access to VUMC billing numbers, vouchers, and scholarships.
- Can add new individuals as a member of the lab.
- Can view invoices and reporting activity across all fund sources assigned to the lab.
- Can purchase core services and request reservations (once fund is activated and access is granted to specific fund).

Lab Member

- Can **purchase** core services and request **reservations** (once access is granted to active fund).
- Can **view invoice** and reporting activity if member directly requested service or reservation in iLab.

Financial Manager

- This is an **add-on** to the other roles of the lab.
- A green dollar sign will display next to individuals that have the financial contact access to the lab.
- The first financial contact in the lab will receive **iLab email notifications** (Invoice notification, financial approval needed, scholarship fund activated, etc.).
- This role is **responsible** for **approving** service requests that exceeds the lab group auto-approval threshold amount. If approval is needed, the user will receive an email notification.

Spending Thresholds and Approval Requirements per Lab Group

- Lab-level setting
- Any orders/reservations exceeding the threshold submitted by the PI's lab members must be approved by PI or those with financial contact (\$) access to the lab group.
 - Any orders impacted by threshold will display with the "Awaiting Financial Approval" status.

Department Administrators

Only those with the department administrator role can claim Cost Centers, Gift or Program Worktags into a PI's Lab Group. The PI or Lab Manager does not have this functionality.

Department Administrator Role

- Department modules are established within workday. Department Administrators are assigned the administrator role per department.
- PI lab groups are added to department modules. If the PI lab group is assigned to your department module, you can:
 - View invoices and charge reporting
 - Claim cost centers, gift or program worktags into the PI's Lab GroupAssist in managing access to funds to various lab members after the fund numbers have been activated.

Billing Number Management

VUMC Billing Numbers

All internal VUMC billing numbers for VUMC investigators are activated via a nightly feed from Workday.

Key Points

- Sponsored Funds:
 - Types: **Grant** Worktags
 - Auto assigned to PI's VUMC Lab Group via feed.
 - Only one PI lab group per sponsored fund. This cannot be edited in iLab, it is controlled by Workday integration.
- Non-Sponsored Funds:
 - Types: **Gift** worktag, **Project** worktag, **Cost Center**
 - PI or Department must 'claim' the fund number in the PI's Lab Group Module.
 - Multiple lab groups can claim the same non-sponsored fund number.

Claiming a Gift, Project, or Cost Center Worktag

After the nightly feed, the PI or lab manager will need to claim a gift, project, or cost center worktag for the lab group.

Instructions for PIs or Lab Managers:

1. Click on the **my groups** on the left side of the iLab page.
2. Click on the lab name under the **Labs/Groups I Manage** section.
3. Click on the **Membership Requests & Billing Numbers** tab
 - a. All active and claimed billing numbers, vouchers, and scholarships will display here.
4. Click on the **Request access to additional Billing Numbers** option.
 - a. In the **appropriate** box (Gift, Grant, Program, or Cost Center) type in the billing number exactly as it appears in Workday and hit **Request**.

▼ Request access to additional Billing Numbers

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

▼ Request access to additional Billing Numbers

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

Gift

Grant

Program

Cost Center

Request

Granting Lab Members Access to VUMC Funding

After a billing number is claimed, the PI or Lab Manager can grant lab members access to the specific fund numbers.

If you also need the lab manager role for your investigators to assist with this process, email VUMCcores@vumc.org and we will update your account.

Instructions for PIs or Lab Managers:

1. Click on **my groups** on the left side of the iLab page.
2. Click the lab name under the **Labs/Groups I Manage** section.
3. Click the **Membership Requests & Billing Numbers** tab to view the active center numbers for the lab.
4. All lab members and active centers will be displayed.
 - a. **Check the box** on the row for the user to grant access to the specific center number.
5. The system will **automatically save your changes**. All new changes will be highlighted green.

TIP: Use the Filter options at the top of the lab group grid to find the billing number (cost center, voucher, scholarship fund)

Meyn, Susan (VUMC) Lab

Membership Requests & Billing Numbers | Members (0) | Budgets | Bulletin board (0) | Group Settings

Membership Requests

✓ No Access Requests require approval

Manage Billing Numbers

► Customize Billing Number Grid

Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

Filter Billing Number numbers

Filter Members

Name	Default Billing Number	1040642334	1040642346	1040645556	1040647777	1040647890	100007579	4041230000	404006231	4045551299	4045470135	4044338899	S-Core Allocation Testing: (400.00)	S-FY18 Scholarship Training: (500.00)	S-Test Scholarship Allocation 2: (201.00)	S-Tr Scholarship Alloc: (100)
Susan Meyn	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aleanha Harris	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

VU Billing Numbers

To activate or manage VU billing numbers, users should complete a **webform** on the **Office of Research website**.

- VU Department Administrators, PIs, Lab Managers, or Lab Members can submit the webform.
- Please allow 24-72 business hours for processing.

Examples of VU Billing Numbers

VU users are instructed to use their full CoA/ POET numbers.

COA number for all VUMC Cores usage except for Division of Animal Care

###.05.#####.6250.###.###.###.0.0

COA for Division of Animal Care

###.05.#####.6265.###.###.###.0.0

VU Project billing number consist of the project number concatenated with task number with a period separating them. Please note task number can range from 1 - 20 digits).

#####.#

AA_#####.#

AAA_#####.#

Granting Lab Members Access to VUMC Funding

- VU will indicate on the webform if the VU number should be shared with all members of the VU Lab Group or specific members.
- If the PI or Lab Manager wants to add members later or add a new member of the lab, email VUMCcores@vumc.org. We will grant access to the VU billing number for the new VU lab member.

Vouchers

VICTR vouchers are activated via an overnight feed from the StarBRITE application. If the user that has been awarded the voucher has a VUMC lab group setup in their name, the voucher will automatically appear.

Key Points

- Vouchers are added into iLab via **overnight feed** from the StarBRITE application.
- The voucher is added into iLab based on the awarded investigators email.
 - Make sure the email listed in iLab **matches** what is on the voucher award in StarBRITE.
- Voucher funds are **core specific**. You can only use your voucher to purchase services from the assigned VUMC core facility.
- Any **pending** purchases will also **encumber** against the available balance in iLab.
- Since the vouchers represent funding from VICTR. A VUMC lab group will need to exist for the individual awarded the voucher.
 - **VUMC Users:** The PI will see their voucher in their “VUMC” Lab group.
Example: Smith, Jane (VUMC) Lab
 - **VU Users:** The PI will see their voucher in their “VUMC Scholarship & Voucher” Lab group.
Example: Johnson, Jake (VUMC Scholarship & Voucher) Lab

Troubleshooting: If you are unable to view see your voucher in iLab, please contact the VUMC Office of Research support team at VUMCcores@vumc.org. To resolve, we will need the voucher redemption ticket associated with your award. The ticket will reference the VICTR award number (VR) and the name of the individual that received the award.

Viewing Voucher Information in iLab

PIs and Lab Managers can view the following information for each awarded voucher in the PI's fund grid.

*Only the PI and lab managers will have access to the PI's fund grid.

- **Voucher Number** (i.e, V0000012345)
- **Hover over the voucher number to view:**
 - **Expiration date**
 - **Core Name**
 - **Balance:** the remaining amount available to spend

NOTE: To view the PI's fund grid, click 'My Groups' in the left-hand navigation panel. Select the applicable lab group. Then click the 'Membership Requests & Billing Numbers' tab of the lab group module.

Escue, Alisa (VUMC) Lab

Membership Requests & Billing Numbers | Members | Budgets

Membership Requests

Manage Billing Numbers

Name	Default Billing Number	Voucher Number	Expiration Date	Core Name	Balance
Alisa Escue	None	V0000028746	Expires on no expiration date	Use on: > Core 4 (DEMO)	Balance: \$15000.00
Leslie Knoppe	None				

The **remaining balance** can also be viewed when requested core services or making a reservation in iLab.

- The amount that displays next to the voucher number is the remaining balance amount.

Payment Information

You may supply the Billing Number (optional)
Please select the payment method: ?

%

1 100.0 %

100.0%

Billing Number ▾

- Select Billing Number...
- Select Billing Number...
- V0000032307 - - \$14988.00 (Does not expire)**
- 4008007079 - Demo Test (Expires on December 31, 2019)
- 4045508911 - Test funds (Does not expire)
- 4043338914 - Ro1 Grant Funds (Does not expire)

Balance Notes: Any pending purchases will also encumber against the available balance in iLab. This includes:

1. Service added to an open project that have not yet been marked as complete.
 - a. This typically happens when a core has provided an estimate/quote of services via the iLab application.
2. Pending reservations that have not yet occurred.

Scholarships

Scholarships are credit vouchers redeemable in center-supported core facilities. They are center and core specific and are awarded by centers to member investigators at the beginning of each center's grant year and expired at the end of that year. Once expired, a scholarship voucher cannot be reactivated, and the unused funds do not roll forward. Viewing Scholarship Information in iLab

PIs and Lab Managers can view the following information for each awarded scholarship in the PI's fund grid. The PI and lab managers will have access to the PI's fund grid.

- **Scholarship fund number** (i.e, 1240063)
- **Expiration date**
- **Core Name**
- **Awarded amount**

Knope, Leslie (VUMC) Lab

Membership Requests & Billing Numbers | Members (3) | Budgets | Bulletin board (2) | Group Settings

Membership Requests
✓ No Access Requests require approval

Manage Billing Numbers
Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

Name	Default Billing Number	4008007079	4040661122	4040662233	S-Date Test 3-1307027 (100.00)	S-OOR (7/1/17 to 6/30/18)-1240063 (5,000.00)	Fund Name: OOR (7/1/17 to 6/30/18) From Core: Core 4 (DEMO) Expires on: June 30, 2018	Test End Date (Exp 28/17)-1170368 (100.00)	S-Test Scholarship Allocation 3-1138553 (1,000.00)	S-Test Scholarship Allocation 4-1149371 (100.00)
Leslie Knope	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>
Alisa Escue	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
Core Financial Manager	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

S-OOR (7/1/17 to 6/30/18)-1240063 (5,000.00)

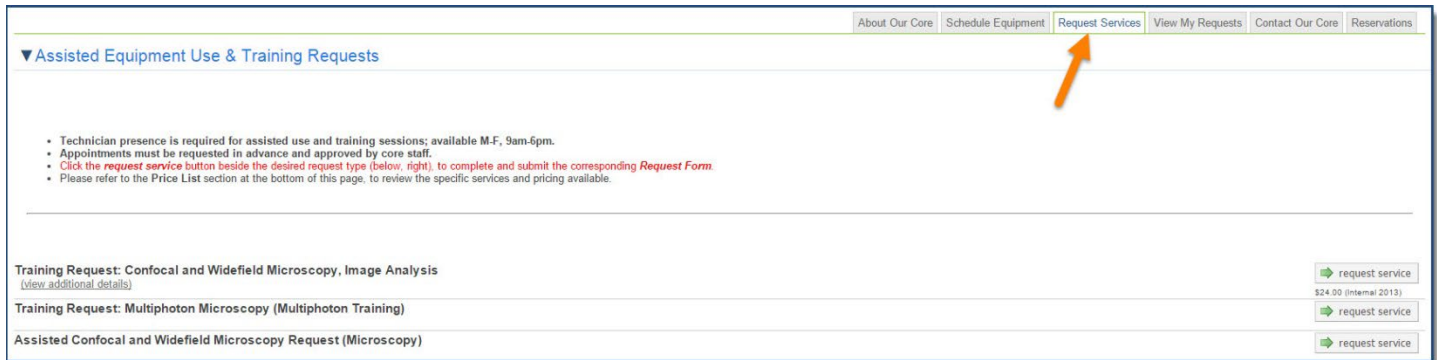
Fund Name: OOR (7/1/17 to 6/30/18)
From Core: Core 4 (DEMO)
Expires on: June 30, 2018

How To: Request Services

Requesting Services

Some cores will require you to initiate new service requests in iLab. Once you have selected a core, you can request a service by doing the following:

1. Click on the **Request Services** tab.
 - a. On the Request Services page, there will be a list of available services.



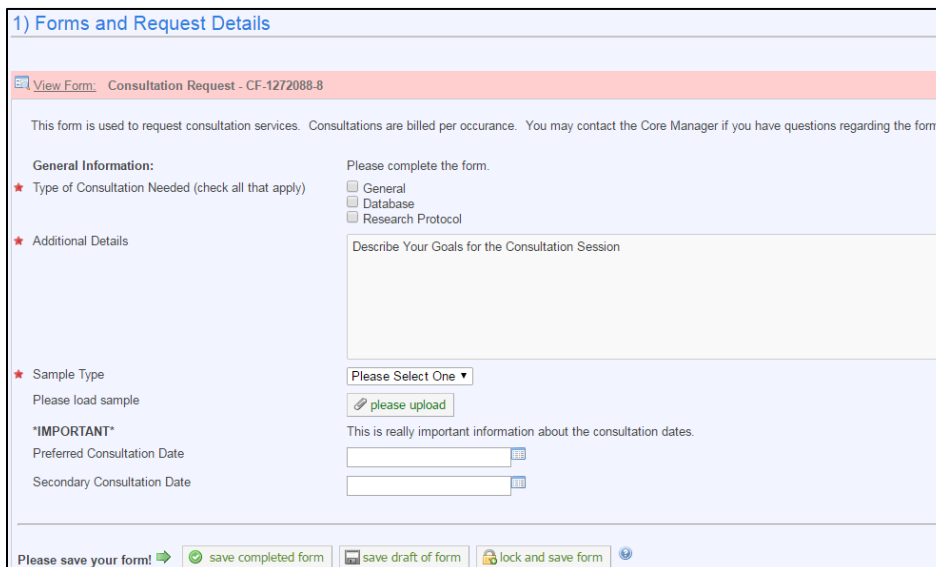
The screenshot shows the 'Request Services' page with a navigation bar at the top containing 'About Our Core', 'Schedule Equipment', 'Request Services', 'View My Requests', 'Contact Our Core', and 'Reservations'. The 'Request Services' tab is active and highlighted with an orange arrow. Below the navigation bar, there is a section titled 'Assisted Equipment Use & Training Requests' with a dropdown arrow. Underneath, there are several bullet points providing instructions: 'Technician presence is required for assisted use and training sessions; available M-F, 9am-6pm.', 'Appointments must be requested in advance and approved by core staff.', 'Click the request service button beside the desired request type (below, right), to complete and submit the corresponding Request Form', and 'Please refer to the Price List section at the bottom of this page, to review the specific services and pricing available.' Below the instructions, there is a list of services: 'Training Request: Confocal and Widefield Microscopy, Image Analysis' (with a 'view additional details' link), 'Training Request: Multiphoton Microscopy (Multiphoton Training)', and 'Assisted Confocal and Widefield Microscopy Request (Microscopy)'. Each service has a 'request service' button to its right. An orange arrow points to the 'request service' button for the 'Training Request: Confocal and Widefield Microscopy, Image Analysis' service.

2. Click on the **Request Service** button to the right of the service you would like to request.
 - a. A submission form will open.



The screenshot shows the submission form for a service. It features a list of services on the left and 'request service' buttons on the right. The services listed are: 'Training Request: Confocal and Widefield Microscopy, Image Analysis' (with a 'view additional details' link), 'Training Request: Multiphoton Microscopy (Multiphoton Training)', 'Assisted Confocal and Widefield Microscopy Request (Microscopy)', 'Assisted Multiphoton Microscopy Request (Multiphoton Microscopy)', 'Assisted Image Analysis Request (Analysis)' (with a 'view additional details' link), and 'Data Processing Request (Analysis)'. Each service has a 'request service' button to its right. An orange arrow points to the 'request service' button for the 'Assisted Image Analysis Request (Analysis)' service.

3. Complete the submission **form**.
 - a. Be sure to complete all required fields marked by a red star.



The screenshot shows the '1) Forms and Request Details' page for a 'Consultation Request - CF-1272088-8'. The page title is '1) Forms and Request Details'. Below the title, there is a 'View Form' button and the request ID. The main content area contains the following text: 'This form is used to request consultation services. Consultations are billed per occurrence. You may contact the Core Manager if you have questions regarding the form.' Below this text, there are two columns of form fields. The left column contains: 'General Information:' with a red star icon, 'Type of Consultation Needed (check all that apply)' with checkboxes for 'General', 'Database', and 'Research Protocol', 'Additional Details' with a red star icon and a text area labeled 'Describe Your Goals for the Consultation Session', 'Sample Type' with a red star icon, 'Please load sample' with a 'please upload' button, and 'IMPORTANT*' with a red star icon. The right column contains: 'Please complete the form.' with a red star icon, 'Please Select One' dropdown menu, and 'This is really important information about the consultation dates.' with two date input fields labeled 'Preferred Consultation Date' and 'Secondary Consultation Date'. At the bottom of the form, there is a 'Please save your form!' prompt and four buttons: 'save completed form', 'save draft of form', 'lock and save form', and a help icon. An orange arrow points to the 'save completed form' button.

4. In the **payment information** section, select the correct center number from the **drop-down menu**.
 - a. If the center number is not available, contact your **lab manager**.
 - i. **Lab members** will need to be **granted access to activated center numbers** by the PI and/or the Lab Manager.
 - ii. PI or Lab Managers will need to contact the department administrators **to activate new center numbers in iLab**.

3) Payment Information

You may supply the Billing Number (optional)
Please enter the Billing Number

% Billing Number

100.0% total allocated

- b. **Split Charge:** The cost-of-service requests can be allocated across center numbers.
 - i. To allocate across multiple center number, click **split charge**.
 - ii. Select the additional center number from the drop-down menu.
 - iii. Enter the % allocations to split the cost across the center numbers.

3) Payment Information

You may supply the Billing Number (optional)
Please enter the Billing Number

% Billing Number

%

100% total allocated

5. Click the **submit request to core** button at the bottom of the page to submit your request.
6. After submitting your request, you will be redirected to the **View My Request** tab, where you can review the status of your request, and any quotes provided by the core.

Core 4 (DEMO)

VANDERBILT UNIVERSITY
MEDICAL CENTER

About Our Core | Schedule Equipment | Request Services | View My Requests | Contact Us

▼ active requests

Searching within active requests: Results in this tab are restricted by Status (drop down)
Please use the filter panels in the left-hand menu to drill down to requests of interest. You can also save filters to custom tabs! [Click here for more details.](#)

Hide Filters

date	for	service id	status	cost
May 19 (May 19 2016)	Paul Investigator Vanderbilt Testing (TEST) Lab	QDEMO-PI-117 Consultation	Waiting for Core to Agree	\$0.00 (\$0.00)
May 19 (May 19 2016)	Paul Investigator Vanderbilt Testing (TEST) Lab	QDEMO-PI-116 Equipment Training	Waiting for Core to Agree	\$0.00 (\$0.00)
May 28 (May 28 2016)	Paul Investigator Vanderbilt Testing (TEST) Lab	QDEMO-PI (CIC) Consultation	Waiting to Submit to Core	\$0.00 (\$0.00)
Feb 16 (Feb 16 2016)	Paul Investigator Vanderbilt Testing (TEST) Lab	QDEMO-PI-97	Waiting for Core to Agree	\$0.00 (\$0.00)
Feb 16 (Feb 16 2016)	Paul Investigator Vanderbilt Testing (TEST) Lab	QDEMO-PI-96	Waiting for Researcher to Agree	\$89.00 (\$89.00)
Feb 16 (Feb 16 2016)	Paul Investigator Vanderbilt Testing (TEST) Lab	QDEMO-PI (CIC)	Waiting to Submit to Core	\$0.00 (\$0.00)

7. You will receive **emails from iLab** if **further actions are required** for your request to be processed.
 - a. Please follow the instructions in the emails.
 - b. **Contact the core** or support@ilabsolutions.com if you have any questions.

Approving a Request

When service requests are submitted to core facilities by members of your lab, there may be times when the request requires financial approval. In most cases, this approval step is triggered when the quoted cost of the service exceeds the amount the lab member is auto-approved to spend per the lab's auto-approval settings. For any questions about auto-approval amounts, contact your PI or Lab Manager.

1. You can see all requests that require your approval by clicking on **view requests** under the core facilities section on the left-hand menu on any iLab page.

Click view requests to access requests awaiting your approval

home communications (377) Awaiting Approval Require Payment Info Processing and Recently Completed All requests

core facilities **view requests** (Showing results for 3 Labs)

view funds
list all cores
invoices

reporting

manage groups
my labs
people search

► Show Filters

Displaying 10 out of 27 results. (Page 1 of 3)

date	for	service id	status	cost		
Aug 19 (Aug 19 2015)	Jenny Jones Wallace, Jonathan (TES) Lab	FCH-JJ-4	Waiting for Financial Approval	\$70.00 (\$70.00)	\$0.00	\$70.00

Approve Deny

2. All service requests awaiting your approval will be listed. Click the **blue arrow** beside the service request to expand the information displayed.

Service Requests Awaiting Approval (Showing results for 3 Labs)

► Show Filters

Displaying 10 out of 27 results. (Page 1 of 3)

date	for	service id	status	cost		
Aug 19 (Aug 19 2015)	Jenny Jones Wallace, Jonathan (TES) Lab	FCH-JJ-4	Waiting for Financial Approval	\$70.00 (\$70.00)	\$0.00	\$70.00

Approve Deny

► Overview

► Payment Information update payment information

▼ Forms and Request Details

View Form: Project Erin 1 Completed

consultation 1 description: note: click to edit Not Started

date	description	Quantity	Unit price	Total without tax	Tax	Total price	Billing Status	Work Status
Aug 19 03:26 PM	Microscope Equipment/Corporate	2.0	\$25.00	\$50.00	\$0.00	\$50.00	Not Ready To Bill	Proposed
Aug 19 03:26 PM	Animal Care Services/Corporate	1.0	\$20.00	\$20.00	\$0.00	\$20.00	Not Ready To Bill	Proposed

Comments add comment Attachments & URLs add attachment add url

► Service Request History

► Billing Information edit ► Shipping Information edit

Nov 14 2014 (Nov 14 2014)	Jimmie Ehlers Crane, Franklin (TES) Lab	2014-11-Crane-479-1306 GMP	Waiting for Financial Approval	\$36,084.00 (\$15,564.00)	\$0.00	\$15,564.00
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Approve Deny

3. If all information is correct, you may approve the service request by clicking **approve**.

date	for	service id	status
Aug 19 (Aug 19 2015)	Jenny Jones Wallace, Jonathan (TES) Lab	FCH-JJ-4	Waiting for Financial Approval

Approve Deny

► Overview

- Once you approve the request, a pop-up window will display. If needed, you can update the payment number and click **Submit**.

- Once you have approved the request, the status will update to **Waiting for Core to Begin**, and a notification will be sent to the core manager that the request has been approved.

Name	Owner	Cost	State	Action
GRCE-Bowtie-VH-2255 GRCE-Burchfield-AB-2253 Next Generation Sequencing -	Amparo Burchfield	\$2,542.00 (92.942.00)	Waiting for Core to Begin	Begin

Email Notification Notes:

If you are set up to be a financial contact for your lab you will receive an email when a request requires your approval. You can approve service requests by clicking the link within the notification email sent when the service request is submitted for approval.

- Once logged in, you will see the service request where you can view the details, click on approve to provide payment information, and submit the approved request to the core facility.

iLab Solutions
Save money. Save time. Accelerate research.

Hello Jonathan Wallace,

You need to provide financial approval for the request summarized below. Follow the link below to review request details and give approval.

If you would like update payment information or specify separate payment information for individual charges, log into iLab and click on the dollar icon to access checkboxes to the right of each row.

Projected cost:	\$0.00
Payment information:	
Requester:	Jenny Jones
Core:	Fraise Children's Hospital
Core contact:	
Service category:	no service category
Service name:	Erin Project 2
Service ID:	FCH-JJ-4
Request date:	08/19/2015

[Click here to "Approve" the request through iLab \(and to modify payment options\).](#)

(You will be required to login, then be redirected to the request that requires your attention.)

Please feel free to contact support@ilabsolutions.com if you have any problems accessing or approving your request.

Please do not reply to this e-mail, but access iLab through the link above.

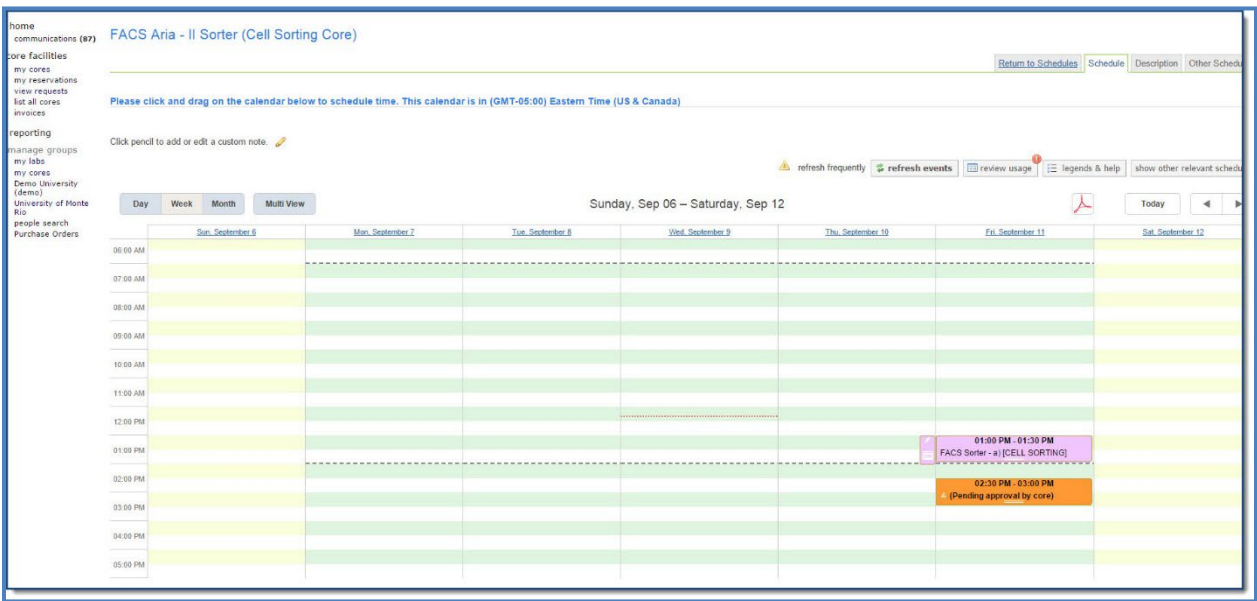
How To: Request an Equipment Reservation

Once you have selected a core, you can request a reservation by doing the following:

1. Click on the **Schedule Equipment** tab. On the Schedule Equipment page, there will be a list of available instruments.
2. Click on the **View Schedule** button to the right of the instrument you would like to reserve.



3. Click and drag on the time frame you would like to schedule your reservation.



4. A **submission form** will open, **complete** the form.

a. Enter a description of the event in the **Event Notes** field (optional). This information will display on the calendar.

b. Be sure to complete all required fields marked by a red star.

The screenshot shows a reservation submission form with several sections and callouts:

- Reservation details:** Includes resource information (LSM 510 Station 1 - c) Assisted Use - Regular Hours \$50.00/hr), lab name (Teresa, Nikita (UCMDF) Lab), and creation date (September 08, 2015 21:58). A callout points to the resource selection dropdown: "Specify the required resource: LSM 510 Station 1" with the note "Be sure you have the correct resource selected."
- Scheduling:** Shows dates (09/10/2015) and times (3:15PM - 09/10/2015 | 4:30PM). A callout points to the time selection: "Verify the date and time are correct."
- Event Notes:** A text field for notes with a callout: "If you need a stage heater for this reservation, click open Reserve time on a linked schedule and select a stage heater."
- Reserve time on:** A checkbox for "Reserve" with a callout: "By checking this box, you may also schedule this time on any related resources."
- Repeating event:** A checkbox for "Enabled" with a callout: "You may choose to repeat this reservation on the schedule selected."
- Use and cost of reservation:** Shows a price group dropdown (Sep 10 15 15 - 16 30 c) Assisted Use - Re and a total cost of \$62.5 (1.25 hours). A callout points to the price group: "Select the appropriate price group."
- Payment information:** Includes a PO Number field and a percentage dropdown (100.0%). A callout points to the percentage: "In some cases, the facility may request payment information."
- Required forms sidebar:** Titled "Assisted Microscopy Details", it contains a "Save Progress" button, a dropdown menu, and a text area for "Please indicate your microscopy requirements below." A note at the bottom states: "Note: This section will vary with each resource." Below this is a "Scheduling Details" section with text: "Technician presence is required for an Assisted Microscopy appointment, available during OMC business hours M-F, 9a-5p. An appointment time will need to be approved by the OMC."
- Buttons:** "Save Reservation", "Cancel Changes", and "Delete Reservation" are visible at the bottom.

5. In the **payment information** section, select the correct center number from the **drop-down menu**.
 - a. If the center number is not available, contact your **lab manager**.
 - i. **Lab members** will need to be **granted access to activated center numbers** by the PI and/or the Lab Manager.
 - ii. PI or Lab Managers will need to contact the department administrators **to activate new center numbers in iLab**.

3) Payment Information

You may supply the Billing Number (optional)
Please enter the Billing Number

%	Billing Number
1 100.0	% 1040667890 - OOR Demo Ctr 2 (Does not expire) ▼
100.0%	total allocated ⓘ

- b. **Split Charge:** The cost-of-service requests can be allocated across center numbers.
 - i. To allocate across multiple center number, click **split charge**.
 - ii. Select the additional center number from the drop-down menu.
 - iii. Enter the % allocations to split the cost across the center numbers.

3) Payment Information

You may supply the Billing Number (optional)
Please enter the Billing Number

%	Billing Number
1 75	% 1040667890 - OOR Demo Ctr 2 (Does not expire) ▼
2 25	% 1040665555 - Test Ctr - Vanderbilt IDASC Lab (Does not expire) ▼
100%	total allocated ⓘ

6. Select **Save Reservation** button at the bottom of the page to submit your reservation request.

Payment information:

Please enter the Billing Number

%	Billing Number
1 100.0	% 1040667890 - OOR Demo Ctr 2 (Does not expire) ▼
100.0%	total allocated ⓘ

Invite additional people to this event by email ⓘ

Please enter a comma separated list of valid email addresses

7. You will receive **emails from iLab if actions are required** for your request to be processed.
 - a. Please **follow the instructions** in the emails.
 - b. **Contact the core** if you have any questions.

Equipment Reservation Notes

Trained Users:

In some cases, cores require only allow trained (or approved) users to schedule time on specific instruments.

- If you have access to the calendar, you will be able to select view schedule and make a reservation.
- If you do not have access, you will need to select “Request Training” to request approval from the core to use the instrument.

The screenshot shows the iLab Solutions website interface. At the top left is the iLab Solutions logo with the tagline 'Save money. Save time. Accelerate research.' The main header features 'Vanderbilt Technologies for Advanced Genomics (VANTAGE)' and the Vanderbilt University Medical Center logo. A search bar at the top right contains the text 'Search cores and services...'. Below the header is a navigation menu with links: 'About Our Core', 'Schedule Equipment', 'Request Services', 'View My Requests', 'Contact Us', and 'Reservations'. The main content area is titled 'Schedule Resources' and includes a warning: 'Reservations must be cancelled 1 hour prior to the reserved time or users will be charged for the reservation.' Below this, it states: 'Reservations may be made on both the Quant Studio and the 7900HT 24 hours a day and 7 days a week. Samples **MUST** be dropped off during normal business hours. No access to the core is granted outside of normal business hours.' There is also a note about a 'Sample drop-off room (available 24/7)'. In the bottom right corner, two buttons are circled in orange: 'view schedule' and 'request training'.

Reservation Approval:

In some cases, cores require core approval for reservations. If the customer has reserved time on a calendar that requires core approval, that event will display in orange. When the reservation has been approved, the event will display in **Gray**.

The screenshot shows a calendar interface for the week of September 25 to October 1, 2022. The calendar is set to 'Week (7 Days)' and 'Central Time (US & Canada)'. The days of the week are Sun, 25 Sep, Mon, 26 Sep, Tue, 27 Sep, Wed, 28 Sep, and Thu. The time slots range from 08:00 AM to 08:00 PM. A reservation is shown on Wednesday, September 28, from 10:00 AM to 11:00 AM, with the name 'Leslie Knope'. The reservation box is gray, indicating it has been approved. The days from Monday to Thursday are marked as 'Independent Use'.

	Sun, 25 Sep	Mon, 26 Sep	Tue, 27 Sep	Wed, 28 Sep	Thu
08:00 AM		Independent Use	Independent Use	Independent Use	Indepe
09:00 AM					
10:00 AM				10:00 AM - 11:00 AM Leslie Knope	
11:00 AM					
12:00 PM					
01:00 PM					
02:00 PM					
03:00 PM					
04:00 PM					
05:00 PM					
06:00 PM					
08:00 PM					

Invoice Review

From the left-hand menu, click the **Invoices** label to access invoice and pre-invoice reports. Users can view all invoices created by any core for any billing number connected to the user's department.

1. Click on **Invoices** in the left-hand menu. A **list of invoices will appear**.
2. **Use the filter panel on the left** to reduce and sort the invoices that display.
 - a. **Example:** Use the '**payment number**' filter and select the invoice number. Click '**Apply Filters**'.
 - b. **Example:** Use the '**keyword search**' and type in the invoice number. Click '**Apply Filters**'.
3. On the far right, click the **magnifying glass** to view the actual invoice.

The screenshot shows the Agilent CrossLab iLab Operations Software interface. The top navigation bar includes the Agilent CrossLab logo, the text 'iLab Operations Software', a search bar, and user information for 'Lois Lane'. The main content area is titled 'Invoices' and features a filter panel on the left with various categories like Keywords, Total Cost Over, Owner, and Owner Institution. A table displays two invoices with columns for Created On, Core, Invoice Number, Lab, Owner, Payment Numbers, Price Types, Total Cost, Past Due, Status, and Approval Status. Two callout boxes are present: one pointing to the filter panel with the text 'Use the filter to reduce and sort your invoices', and another pointing to a magnifying glass icon in the table with the text 'Click the Magnifying glass to view the invoice'.

Created On	Core	Invoice Number	Lab	Owner	Payment Numbers	Price Types	Total Cost	Past Due	Status	Approval Status	
Apr 07 '22	> Core 4 (DEMO)	C-3109923	Knope, Leslie (VUMC) Lab	Leslie Knope	1041235859	Internal	\$2,723.39	over 90 days	Not Yet Paid	not required	
Apr 07 '22	> Core 4 (DEMO)	C-3109924	Knope, Leslie (VUMC) Lab	Leslie Knope	1040660988	Internal	\$224.00	over 90 days	Not Yet Paid	not required	

Reporting

The reporting functionality within iLab will allow users to generate reports to see amount spent across billing numbers, PIs, and cores.

Running a Report in iLab

1. Click on the **My Departments** label in the left menu to navigate to your department module.
2. Once your department module displays, click the **Reporting** tab.
3. The reporting module will display. Select **Load Default** to load the iLab default report settings (recommended).
4. Enter the **Report Settings**:
 - a. Select the **date range** for the report.
 - b. Select the **date field**: Change to **Completion date**.
 - c. OPTIONAL: Click **Charts & Tables** to adjust and modify the reports that will populate.
5. Click **Run Report**
 - a. This will generate a high-level report that will include charges across billing numbers, PIs, and cores.

The screenshot displays the 'Report settings' interface. At the top, there are four buttons: 'Load default' (highlighted with a red box), 'Load saved', 'Build new', and 'Reporting home'. Below these, the 'Report settings' section is divided into four columns:

- 1. Select a date range:** (highlighted with a red box) Includes 'Start' (July 1, 2016) and 'End' (September 2, 2017) fields, each with a calendar icon.
- 2. Select date field:** (highlighted with a red box) A dropdown menu currently set to 'Completion date'.
- 3. Customize display:** Includes a button labeled 'Charts and tables...'.
- 4. Apply settings:** (highlighted with a red box) Includes a button labeled 'Run report!'.

Refining the Report

To refine the report and specify the data down to a certain PI, billing number (*VUMC center number*), and/or core.

1. Using the **filter panel** on the left side, **adjust the filters** (i.e., “payment number”) to refine the report.
2. Click **Apply filters**.
3. The report will update with data specific to those filters.

Charge reporting for July 1, 2017 to September 2, 2017 by completion date

Hide Filters

Save... Share... Email... Export... Print preview...

Cores by month (by total cost)

Showing 10 entries

Core	Jul-2017	Aug-2017	Sep-2017	Total
VUMC Technologies for Advanced Genomi...	\$0.00	\$4,708.83	\$0.00	\$4,708.83
Total	\$0.00	\$4,708.83	\$0.00	\$4,708.83

Showing 1 to 1 of 1 entries

Previous 1 Next

Filter Panel:

- Core
- Customer
- Lab
- Department
- Institution
- Organization
- Core Organization
- Center
- Work status
- Billing status
- Ad-hoc charge justification
- No charge justification
- Price type
- Billing event
- Study
- Billing event status
- Payment Number
 - 4047810207
 - 4047818122
 - 4047819983
 - 4047819992
 - 4047817142
 - 4047817722
 - 4047850471
 - 4047850581
 - 4047900191
 - 4047907082
 - 4047907292
 - 4047906972
 - 4047905031
 - 4081000190
- Payment Method
- Service
- Request Name
- Peer Review Status
- Apply Filters
- Reset Filters

Filter Panel (Expanded):

- Core
- Customer
- Lab
- Department
- Institution
- Organization
- Core Organization
- Center
- Work status
- Billing status
- Ad-hoc charge justification
- No charge justification
- Price type
- Billing event
- Study
- Billing event status
- Payment Number
 - none
 - 4008007079
 - 4040861122
 - Select all
- Payment Method
- Service
- Request Name
- Peer Review Status
- Apply Filters
- Reset Filters

Reviewing and Exporting Reports

To review the expense activity, download the data or export the reports to excel.

1. Click **Export**
2. Select **Source data as CSV/XLS**.

Charge reporting for July 1, 2016 to September 2, 2017 by purchase date

◀ Hide Filters

Save... Share... Email... Export... Print preview...

Core

Customer

Lab

- AAA Default (VUMC) Lab
- Abou-Khalil, Bassel (VUMC) Lab
- Abramson, Richard (VUMC) Lab
- Abramson, Vandana (VUMC) Lab
- Absi, Tarek (VUMC) Lab

Cores by month (by total cost)

Show 10 entries

Core	Jul-2016	Aug-2016	Sep-2016	Oct-2016	Nov-2016	Dec-2016	Jan-2017	Feb-2017	Mar-2017	A
VUMC Flow	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$31

Download the source data for the tables and charts you are currently viewing, in Comma Separated Value format, which can be opened in a program such as Microsoft Excel. (This will include your selected Date Range and any Filter options applied.)

Charts/tables as PDF

Source data as CSV/XLS

Data from charts/tables below as XLS

Data from charts/tables below as CSV

3. An excel document will **download**.

Report Export Notes

1. **Billing Status** column:
 - a. **ready_to_bill:** Charge is included in either a pre-invoice or a final invoice
 - b. **billing_initialized:** Charge has been completed for billing. An invoice will be generated at month-end.
 - c. **not_ready_to_bill:** Activity requested by lab. This activity has not yet been marked ready to bill by the core; therefore, the work has not been completed.
 - i. **NOTE:** This activity is only displayed if the “purchase date” is used in the report filters.
2. **Date** columns:
 - a. **Purchase Date:** Date the service was requested or date of reservation
 - b. **Completion Date:** Date the reservation occurred or the date the core completed the work and billed the charge.
 - c. **Billing Date:** Date the core finalized all charges for the period.

Charts & Tables: This information can also be viewed without generating an export file through the Charts and Table option.

1. In the report settings, click the **Charts and Tables** icon.

Report settings

1. Select a date range: (select a date range preset)

Start: September 1, 2017

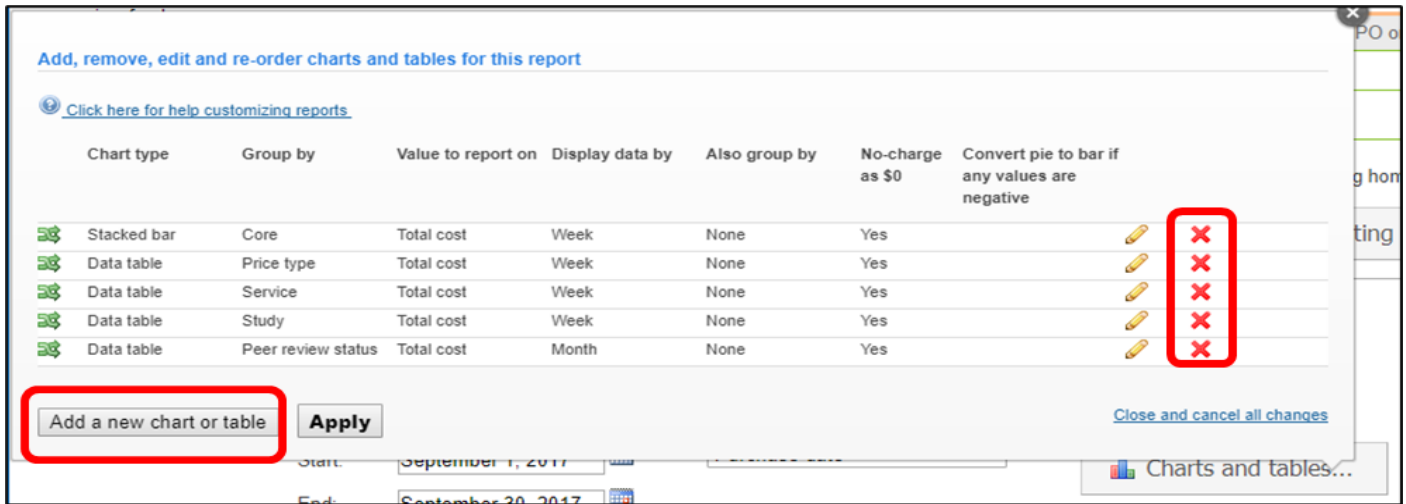
End: September 30, 2017

2. Select date field: Purchase date

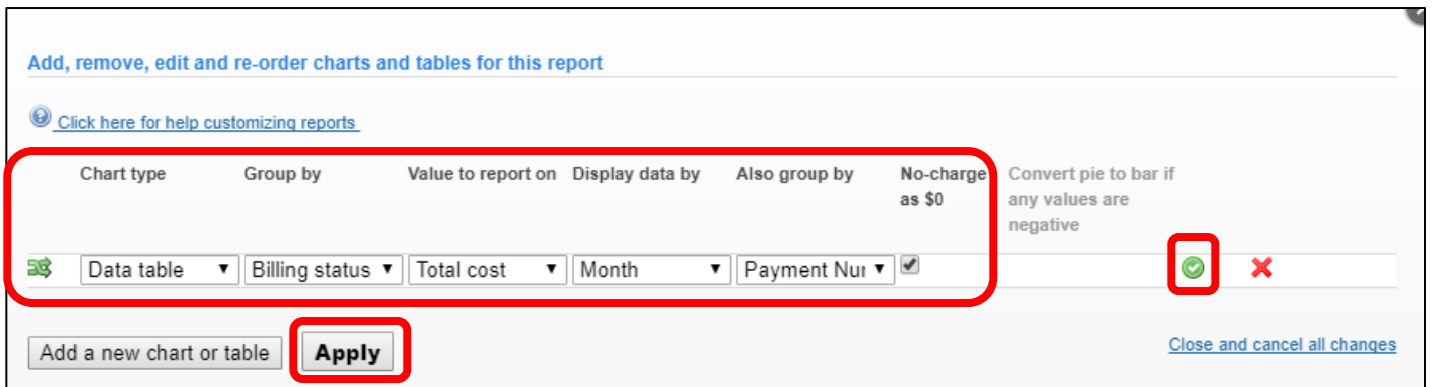
3. Customize display: Charts and tables...

4. Apply settings: Run report!

2. TIP: Click the red x to remove all the pre-populated charts.
3. Click **Add a new chart or table**.



4. Select the following options from the drop-down options for each of the fields.
 - a. Click the **green check** icon to save the filter choices.
 - b. Click **Apply** to save the changes.



5. A **data table** for each cost center within the user's purview will display.
 - a. Tip: Use the filter panel to drill down to a specific center number.

Billing statuses by month (by total cost) for 4040661122

Show entries Search:

Billing status	▲ Sep-2017	⚡ Total
Billing initialized	\$24.53	\$24.53
Not ready to bill	\$135.54	\$135.54
Ready to bill	\$112.13	\$112.13
Total	\$272.20	\$272.20

Showing 1 to 3 of 3 entries Previous Next

Saving a Report to be Generated Again

A user can save report settings including the Charts and Tables to quickly run as needed.

1. Enter the report settings.
2. Enter the Charts and Tables Settings
3. Run the Report
4. Click the **Save** icon.

Report settings

1. Select a date range: (select a date range preset)
Start: September 1, 2017
End: September 30, 2017

2. Select date field: Purchase date

3. Customize display: Charts and tables...

4. Apply settings: Run report!

Report-Lab Billing Review (saved)

Charge reporting for September 1, 2017 to September 30, 2017 by purchase date

Hide Filters

Save... Share... Email... Export... Print preview...

5. Enter a name for the report. Click **Save**.

Save report...

Save as a new report: (enter a new name)
Report-Lab Billing Review

-- OR --

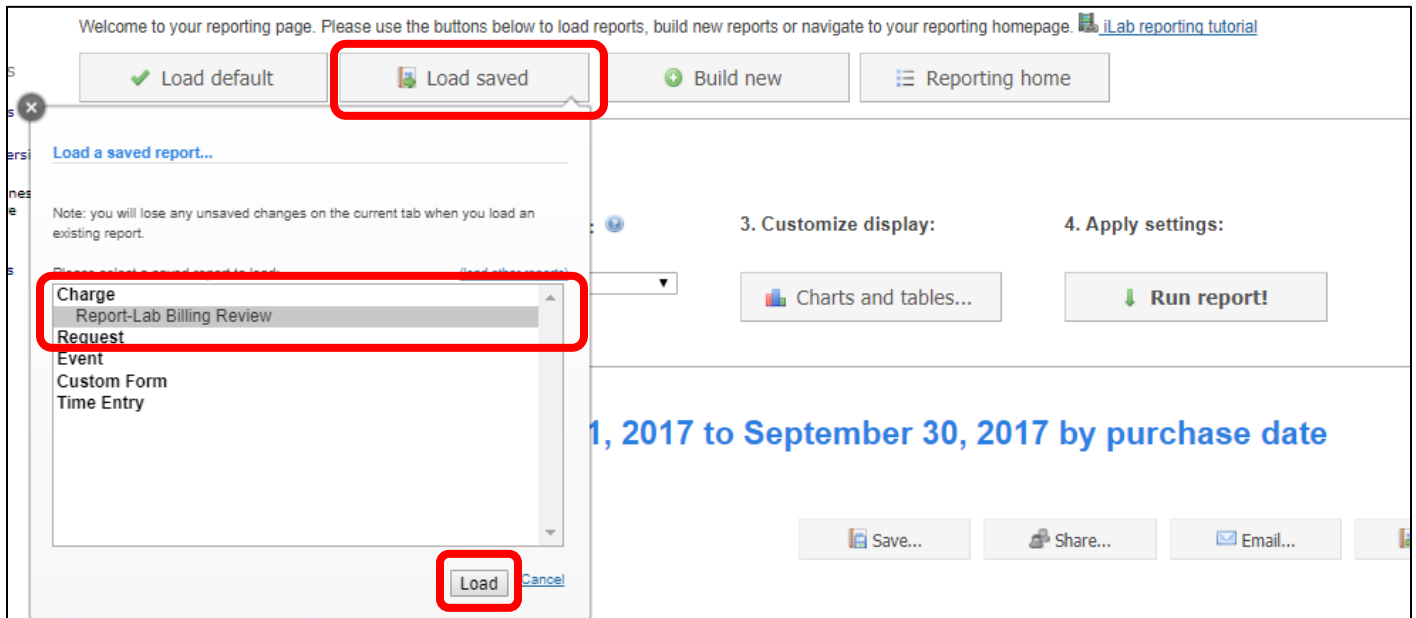
Overwrite an existing report: (select from a previously saved report below)

Charge
Report-Lab Billing Review
Request
Event
Custom Form
Time Entry

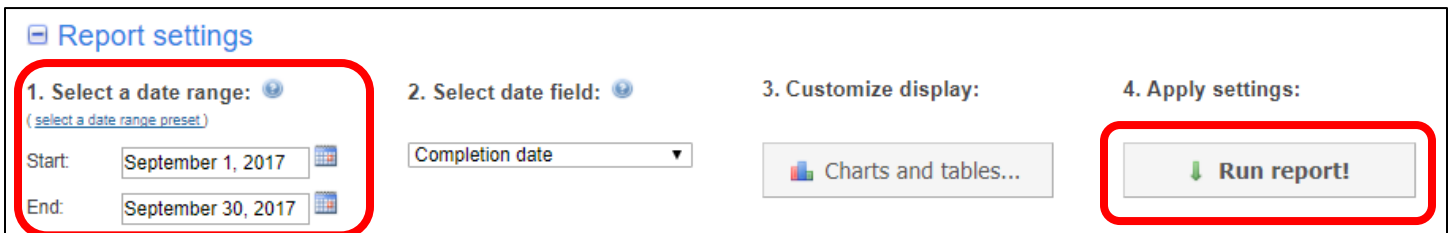
Save Cancel

To run a saved report:

1. Click **Load saved**
2. Select the saved report.
3. Click **Load**



- a. Update the dates for the report and click **Run report!**



Reporting Tutorial

For additional details on available reporting tools in iLab, view the **iLab reporting tutorial**.

