# User Guide:
## Guide to using VU funds to purchase VUMC Core Services
*(VU PIs, Lab Managers, and Lab Members)*

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Accessing VUMC Cores

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

- The system will prompt first-time users to register.
- Registration instructions are available on the Office of Research website.

After you have registered and your account is approved, you can access VUMC Cores in iLab by completing the following:

1. Log into iLab here: https://vumc.corefacilities.org

2. Click the here link under the header Internal Vanderbilt user.

3. All users will use their VUNet ID and ePassword to access the application.

4. Click on the list of all cores link on the left side of the iLab page.

5. Select the core from which you want to order services.
Updating Personal Profile in iLab

Users can update their contact information by editing their personal profile in iLab.

1. Select **My Profile**

2. Select **Edit**

3. Make the update and then select **Update Person Profile** to complete and save the changes.
Billing Numbers for VU PIs and Labs

VU Labs will use the PO payment method when requesting services or reservations.

- POs are used to create valid billing numbers for VU customers within the VUMC cores in iLab, these POs must be created and managed by each individual resource user or PI within each core facility.

- **VU PIs and lab members** will need to enter the **VU Cost Center** into the PO field.

- Once entered, the **core** will need to **approve the PO**. Once approved, the PO number will be available for all future service requests or reservations from a drop down menu for that specific core group.

- **Note:** PO Numbers are entered per **User** per **PI** per **Core** group.

How do I add a VU Cost Center?

PIs and Lab Members will be responsible for creating a PO **within each VUMC core** that is used.

1. The PI or Lab Member can add the PO when visiting the **core’s iLab site**.
   a. On the core’s iLab site, click the **External Customer PO** tab.
   b. Then, click **Add New PO** option.
2. After clicking **Add new PO**, a **window** will open.

![Create New Purchase Order](image)

3. **Complete the fields**, fields marked by a red star are **required**.
   a. **Group**: Select the PI’s Lab Name from the dropdown menu.
      i. **NOTE**: If your PI is not listed, contact the Office of Research to update your account.
   b. **Number**: 10 digit VU center number
   c. **Name**: description of VU center number
   d. **Initial Amount**: Spending limit of the PO
      i. The initial amount entered is not intended to be the account amount charged for core services.
      ii. **NOTE**: It is **only a ceiling** on what could be billed over the course of time.
         1. No funds will be **encumbered**.
         2. **NOTE**: To avoid delays in requesting core services, we encourage users to set higher spending limits.
   e. **Expires on**: expiration date of PO

4. **Click Save Purchase Order**

5. The PO will need to be approved by the core or the VUMC Office of Research. The status will be **pending** approval.

![Core 4 (DEMO)](image)
6. Once approved, the PO will be available in the payment section dropdown menu when service request or reservations are created.

How do I delete or edit a VU Cost Center?

Once a PO has been added, the user must contact the core for any changes or to delete the PO number.

Upon request, the following fields can be updated:
   a. **Number**: 10 digit VU center number
   b. **Name**: description of VU center number
   c. **Initial Amount**: Spending limit of the PO
   d. **Expires on**: expiration date of PO

How can my VU Department Administrator help manage my VU cost centers in iLab?

Currently, only PIs or Lab Members can add a PO directly in the iLab applications. Department Administrators wishing to add activate a VU cost center can complete a web form on the Office of Research website.

- **Web form**: Request a VU Cost Center Update in iLab
- **URL**: [https://medschool.vanderbilt.edu/oor/vu-cost-center-change-ilab-request](https://medschool.vanderbilt.edu/oor/vu-cost-center-change-ilab-request)
Auto-Approval Thresholds

iLab allows PIs to set a threshold on the total allowable amount a lab member is allowed to order through iLab on a per order basis without PI approval.

- Any orders requested below this threshold can be processed by the core without PI approval of the request in iLab.

Vanderbilt Institutional Limits

VUMC set the default “auto-approval threshold” for all labs at $1,000.

- Any orders requested above this threshold amount will require approval from the PI or the PI’s Financial Contact.
- The threshold amount can be changed on a lab-by-lab basis.

To edit the lab’s auto-approval threshold:

1. The PI or the PI’s financial contact can change the amount on the lab’s iLab page.
2. Click “My Labs” in the left-hand menu of the home page.
3. Click the name of the Lab.
4. Click the members tab.
5. Update the amount in the “Auto-approval threshold” filed.
6. Click Save approval settings.

NOTE: Optionally, this threshold can be set at different levels on a member-by-member basis.

1. Click the yellow pencil next to the name of the lab member.
2. Update the amount in the “Auto-approval amount” column.
3. Click Save.
Requesting a Service

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.

   ![Assisted Equipment Use & Training Requests](image1)

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

   ![Training Request Form](image2)

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

   ![Submission Form](image3)
4. In the **payment information** section, select the correct PO number from the **drop down menu**.

![Payment Information](image)

a. If the PO Number is not available, click **Add new PO**:  
   i. Enter the requested information and click **Save Purchase Order**

   1. **VU PO Numbers** will be entered in the **same format as the VU cost center**.

   ![Create New Purchase Order](image)

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

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](mailto:support@ilabsolutions.com) if you have any questions.
Approving a Service 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.

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

3. If all information is correct, you may approve the service request by clicking approve.
4. Once you approve the request, a pop-up window will display. If needed, you can update the PO number and click **Submit**.

![Pop-up window](image)

5. 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.

![Notification](image)

**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.
Requesting 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.
   a. 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.
5. In the *payment information* section, select the correct PO number from the drop down menu.

![Payment Information](image1)

- If the PO Number is not available, click *Add new PO*:
  1. Enter the requested information and click *Save Purchase Order*
  2. VU PO Numbers will be entered in the same format as the VU cost center.

- **Split Charge**: The cost of service requests can be allocated across PO numbers.
  1. To allocate across multiple PO numbers, click *split charge*.
  2. Select the additional PO number from the drop down menu.
  3. Enter the % allocations to split the cost across the PO numbers.

![Create New Purchase Order](image2)
6. Select *Save Reservation* button at the bottom of the page to submit your reservation request.

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 or **support@ilabsolutions.com** 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.

**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 purple.
Reviewing Invoices
From the left menu, click the **Invoices** menu 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 lab.

1. Click on **Invoices** in the left hand menu.

2. A list of invoices will appear.

3. **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’.

4. On the far right, click the **magnifying glass** to view the actual invoice.
Editing the Pre-Invoice: Billing Number Corrections/Distribution

Change the billing number on the Pre-Invoice: Once an invoice has been created by a core, a PI will have the opportunity to review the invoice and make corrections if necessary.

1. Click on Invoices and click the magnifying glass to view the invoice.

2. Pre-Invoice indicates the invoice is in a period where updates and changes are allowed.

3. Invoices will be updated to Final Invoice once the billing has been finalized and uploaded by the VUMC Office of Research.

4. Click the $ Icon to see the PO (VU center number) that will be charged.

5. To update the charges to a different PO (VU center number), select the check box for each charge in the payment list.

6. Using the PO drop-down menu, select a new PO(s).

7. Click Save.
Splitting Charges on the Pre-Invoice: Once an invoice has been created by a core, a PI will have the opportunity to review the invoice and make corrections if necessary.

1. Click on Invoices and click the magnifying glass to view the invoice.

2. Pre-Invoice indicates the invoice is in a period where updates and changes are allowed.

3. Invoices will be updated to Final Invoice once the billing has been finalized and uploaded by the VUMC Office of Research.

4. Review the charges within the invoice.

5. Click the $ Icon to see the PO (VU center number) that will be charged.

6. To split the invoice between PO numbers (VU center numbers), select the check box for each charge in the payment list.

7. In the payment information section, click Add Split.

8. Change the percentage field to the percent to allocate for each PO number.

9. Click Save.
**Reporting**
The reporting functionality within iLab will allow users to generate reports to see amount spent across center numbers, PIs and cores.

1. Click on the **Reporting** label in the left menu to navigate to the reporting module.

2. Select **Load Default** to load the iLab default report settings (recommended).

3. 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.

4. Click **Run Report**
   a. This will generate a high level report that will include charges across billing numbers, PIs and cores.
To refine the report and specify the data down to a certain PI, billing number (VU ‘po 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.
To review the expense activity, download the data or export the reports to excel.
1. Click Export
2. Select Source data as CSV/XLS.

3. An excel document will download.

Report Export Notes

1. **Billing Status** column:
   a. **ready_to_bill**: Charge has been completed for billing. An invoice will be generated at month-end.
   b. **billing_initialized**: Charge is included in either a pre-invoice or a final invoice
   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.

2. TIP: Click the red x to remove all the pre-populated charts.

3. Click Add a new chart or table.
3. 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.

4. 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.
How can reports be saved so that the same report be generated again?

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.

5. Enter a name for the report. Click Save.
To run a saved report:

1. Click **Load saved**

2. Select the saved report.

3. Click **Load**

   ![Image of report page showing steps to load a saved report]

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