# User Guide: Introduction to iLab Solutions for External Users

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Accessing VUMC Cores

External Users **must register for an iLab account** before being able to access the core site in the iLab System.

- To register, click the **register** link under the **Not a VUMC or VU user? (no VUNET ID)** header and complete the registration form.
- Full 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](https://vumc.corefacilities.org) under the “Not a VUMC or VU user?” header using your **iLab Credentials**.

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

3. 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**

![Image of My Profile selection](image)

2. Select **Edit**

![Image of Edit Profile](image)

3. Make the update and then select **Update Person Profile** to complete and save the changes.

![Image of Update Profile](image)
Billing Numbers for External PIs and Labs

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

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

- External PIs will need to enter their PO number into the PO field. External PIs can choose to enter either an official PO number from their institution or any reference number used for billing purposes.

- Once entered, the core or the Office of Research 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.

Adding a new PO Number:

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 either (1) when requesting a service or when requesting an equipment reservation or (2) when visiting the core’s iLab site.
   a. **Option 1:** On the project request/ equipment reservation, click Add New PO in the payment information section.

   ![Add New PO](image)

   b. **Option 2:** On the core’s iLab site, click the External Customer PO tab

   ![External Customer PO](image)
2. After clicking Add new PO, a window will open.

3. Complete the fields, fields marked by a red star are required.
   a. **Number**: PO number
   b. **Name**: description of PO number
   c. **Initial Amount (optional)**: Spending limit of the PO
   d. **Expires on (optional)**: 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**.

6. Once approved, the PO will be available in the payment section dropdown menu when service request or reservations are created.
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” file.
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.

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

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

   ![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.

   ![3) Payment Information](image)
5. Click the **submit request to core** button at the bottom of the page to submit your request.

![Submit Request Button](image)

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.

![View My Request Tab](image)

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.

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**.

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.

**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)

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

![Create New Purchase Order](image2)

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.

![Payment Information](image3)
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](mailto: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.
Running Reports on POs
From the left menu click the “reporting” label. The reporting functionality within iLab will allow users to generate reports to see amount spent across PIs and cores.

1. Click on the Reporting label in the left menu.
2. Select Load Default to load the iLab default report settings (recommended).
3. Select the date range for the report.
4. Click Charts & Tables to adjust and modify the reports that will populate.
5. Click Run Report

To refine the report and specify the data down to a certain PI, 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.
4. Click Export to download the data or export the reports to excel.
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 that will be charged.

5. To update the charges to a different PO, 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 that will be charged.

6. To **split the invoice** between PO 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**.
Paying Invoices

Final invoices are emailed to the external user each month and will reference payment remittance details.

- Please contact the core directly for additional information.

iLab Core Customer Help Articles

For more detailed instructions on ordering services or scheduling equipment please visit the iLab Solutions helpsite: http://help.ilabsolutions.com/core-facilities-customers.