## OVERVIEW: New External User

**STEP 1:** External User Account Creation (Core Manager or External User)

**STEP 2:** Purchase Order Creation (Core Manager)

**STEP 3:** Pricing Panel – Add institution & price type (Office of Research)

## FIRST:

## Verify the external user does not already have an existing iLab Account

Before registering a new user, verify that the user does not already have an existing account.

To search to see if the external user already an account has, attempt to add a PO.

1. Open the Purchase Orders tab in your core’s module.
2. Click “+ New Purchase Order” button
3. In the “Who are you creating this purchase order for?” box enter the external customer’s name.
	1. Important: Uncheck the “Search for Current customers only” box.
	2. TIP: Try searching by last name, first name & Try searching by first name last name

**If name appears, the user has an account.** **Skip to step 2 for instructions on how to create the PO.**

**If name does not appear, the user does not have an account.** Continue with the following instructions to register on behalf of the external user. Or, ask the user to register on their own directly in iLab.

## NEW EXTERNAL USER ACTIVATION PROCESS:

**Complete registration process directly in iLab.** Cores will manage the creation of new external users.
 Option 1: Ask the user to register directly in iLab (<https://vumc.corefacilities.org>)
 Option 2: The core will register on behalf of the external customer.

**Information Required to Register for an Account:**

**External PI Information
 External PI Name:
 Email Address:
 Phone Number:

Billing & Invoicing Contact Information
 External Organization Name:
 Billing Contact Name:
 Billing Phone Number:
 Billing Email Address:
 Billing Address (including city, state, zip code):

Email address for Invoice Submission:**

**Billing Reference Number:** Customer should provide the preferred billing number.
This can be an official PO or simply a reference number to be included on the invoice.
If customer does not have a preference, the core can assign a reference number at their discretion.

## Step 1: Register on behalf of the external PI

1. Log out of iLab. On the log-in screen, select **sign up.**

1. Under “**Not a Vanderbilt University Medical Center user? (no VUNetID**)”:
Click the **register** hyperlink to create a new account.

1. Complete the **Start** section.
	1. Enter the external PI’s email address.
	2. Follow all remaining prompts.

**NOTE: You may receive an error message if the user’s institution has an ID integration with iLab. To resolve, submit an iLab ticket to activate the user’s account. Copy PI on the ticket.**

Ticket Message (*recommended language)*:
The VUMC core group (insert core name) will be providing core services to the following external user. When attempting to register, the system indicates the user’s home institution is already integrated with iLab and asks for institutional credentials.

Please create an iLab account and Lab Group for the user. The user is copied on this ticket.

* PI Name:
* PI Email Address:

Please also add a Financial Contact to this lab group. The invoices for this lab should be sent to the following financial contact:

* Financial Contact Name:
* Financial Contact Email:

Ticket Message (*recommended language)*:
The VUMC core group (insert core name) will be providing core services to the following external user. When attempting to register, the system indicates that “This email address is already associated with an iLab account”. When attempting to find the account to add the purchase order, there is not a lab group with this PI’s name.

Please create a Lab Group for the user. The user is copied on this ticket.

* PI Name:
* PI Email Address:

Please also add a financial contact to this lab group. The invoices for this lab should be sent to the following financial contact. Please set this user as the ‘lab primary contact’.

* Financial Contact Name:
* Financial Contact Email:

**NOTE: If you receive an error stating an account with the user’s email address already exists, try creating a PO. If you cannot find the user when create a PO, submit an iLab ticket to resolve.** Copy the PI on the ticket.

1. **Complete the Personal Information section with the PI Information.**
	1. List the **PI’s name** and phone number in this section.
	2. Enter in the external institution’s name.
		1. If it doesn’t already exist, (create new) will display beside the institution name.
	3. Select “**Principal Investigator**” as the primary role.



1. **Complete the Group Associations screen.**
	1. If the institution is new for iLab, “Create New Group…” will pre-populate for the lab group name.
	2. The PI First name, last name, email address, and phone number will pre-populate.
	3. Answer **YES** to the “**Is there another person in your lab who helps manage lab memberships, fund assignments, and spending approval”** question?



1. **After selecting “Yes”, the Financial Administrator’s details section will display. (This is the billing contact)**
	1. The invoice will be sent via email to the Financial Administrator email address.
	2. Note: “Your Group’s Name” will pre-populate.



1. Complete the **Billing Information** screen.
	1. Enter the billing contact details again on this screen.
2. Click **Complete** to submit. A confirmation message will display.



## Step 2: VUMC Core Manager adds the PO for the external customer.

**IMPORTANT: Core managers are authorized to add purchase orders for most external users.**

Core managers **should not create an account or PO** (external billing number) for following institutions. Contact the Office of Research for help assisting these users.
 (VUMC) Vanderbilt University Medical Center
 (VU) Vanderbilt University
 (VA) Veteran Affairs

NOTE: It typically takes at **least 24 hours** for iLab to create an external account. The PO cannot be created until the external account registration request is processed by iLab.

**To add a Purchase Order:**

1. Open your core iLab Site: click **Purchase Orders tab.**
2. On the right, click the **+ New Purchase Order** button. A new purchase order window will display.
3. Purchase Order Details:
	1. Uncheck the **search for current customers only** box
	2. **Enter the name of the PI** in the search box and choose the correct user.
	3. Click **Proceed**

**NOTE: If the name does not appear, the registration request has not yet been processed. If it’s been more than 2 days, submit an iLab ticket.**

1. Complete remaining fields on Purchase Order Details tab:
	1. **Number:** Enter the customer’s assigned PO or billing reference number
	2. **Name:** Enter the description of the PO (if available).
		1. If not, leave blank. **Field is optional.**
	3. **Initial Amount:** Unless otherwise specified, use a large amount (e.g., 100000000)
		1. **TIP:** Do not enter commas in this field.
	4. **Expiration Date:** Unless otherwise specified, expire the PO one year from current date.
		1. **TIP:** Always choose the last calendar day of that month.
2. Click **Save and Approve** button.
3. Allow the system a few seconds to refresh. The newly created PO will appear at the top.

## Step 3: Notify the Office of Research (OOR)

1. Email VUMCcores@vumc.org and provide the (1) Institution Name and (2) PI Name
	1. **TIP:** On the PO tab, click the **request name.** The contact’s details will display – toggle open Billing Info. Provide a screenshot of this information to the OOR.
2. The OOR will add the institution to the core’s pricing panel and assign the price type.
	1. **If this is not completed,** pricing will not display when the core attempts to charge the customer.
3. The OOR will also ensure iLab activates the invoices link view by adding the organization name to the iLab Smartsheet.
	1. If this is not completed, the customer will not be able to search for invoices directly in iLab.
4. The OOR will send a confirmation email once institution is activated on the core’s pricing panel.

## External Customer Invoice Distribution

 **Auto-Email Notification:** All external invoices are automatically distributed to the invoice owner during the closing process. This message includes a link to login to iLab to view invoices. The email does not include a pdf copy of the invoice.

* The auto-invoice notification process only distributes the email to the “**Lab Primary contact (aka invoice owner)**.

 **OPTIONAL: Additional Invoice Distribution:** If the core wishes to also distribute the invoices to other financial contacts in the lab group, then they will need to distribute via the iLab system. **This option will also attach a pdf copy to the email notification.**

 **Distribution Workflow:**

1. Open Core’s iLab Site >> **Billing** Tab >> Click **Invoices** next to the month’s billing event. A list of invoices will display.
2. Use the **filter panel** to filter to external invoices:
	1. **Price Types**: Select options for **“External-not-for-profit” & “External-for-profit”**
	2. Click **Apply Filters**
3. Click “**Email Admins with Access to Invoices**”. All invoices will display.
	1. Click the box to **Select All Invoices**
	2. Click in the contacts boxes to add additional contacts.
		1. If the lab group has others with ‘financial manager’ access they will display.

**Email Subject** *VUMC Core Name Invoice – Please remit payment*
 **Message (***Recommended Language*)

Please see the attached invoice for Vanderbilt University Medical Center research core services. If you have any questions, please contact us at (enter email address)

**Remit Payment To:** Vanderbilt University Medical Center
Department of Finance
Dept. 1236 P.O. Box 121236
Dallas, TX 75312-1236
 **Make checks payable to**: Vanderbilt University Medical Center
 **Reference the invoice number & (enter cost center) on the check.**

1. Click “**Send Message & Invoice PDF”**

Invoices

**Who receives the invoice email notification?** *Important: the automatic invoice email notification can only go to one address.*

All invoices will be sent to the email address listed as the “lab primary contact” (aka “invoice owner”). This email is the auto-generated email sent from iLab during the monthly closing process.

**To change this email address,** the PI or existing financial contacts will need to submit an iLab help ticket (**ilab-support@agilent.com****).** The core can also submit the ticket but will need to copy the PI.

Ticket Message (*recommended language)*:
Please add the following individual as a Financial Manager to following lab group in iLab.
 PI’s Lab Group Name:

Please set this user as the ‘**Lab Primary Contact’.** This person will need to receive the invoice notification email.
 (1) Financial Contact Name:
 (2) Financial Contact Email:

**Who can view invoices directly in the iLab Application?**

* The invoice owner. This user is the “Lab Primary Contact” assigned for the PI’s lab group.
* PIs or other Financial Managers will have access to view invoices directly in the iLab application.

**Troubleshooting – User reports they did not receive the invoice notification email:**

1. **Verify user is assigned as a financial manager.**
	1. Purchase Orders tab >> Find user >> Click Requestor name hyperlink
	2. The user’s lab group information window will display. >> Click “**Information about labs**” to view **lab group name** and additional information.
	3. All users with a **$ icon** are financial managers.
2. **Ask external user to check their junk mail.** Emails are distributed from no-reply@ilabsolutions.com.
* RECOMMENDATION: If this user is a frequent user of your core, they may need to contact their institution’s IT department to **whitelist** this no-reply@ilabsolutions.com email address.

External Lab Group Roles Defined

**Lab Primary Contact (aka Invoice Owner) Defined:**

* If the “Lab Primary Contact” is set to a specific individual, that person will be designated the ‘Invoice Owner”.
* If not officially set, the invoice owner will default to the first financial contact in the lab group list.
* *The Invoice Owner name displays on the invoice.*

**Financial Managers Defined:**

* The financial managers are all individuals (including the invoice owner) that have access to view the invoices directly in iLab.
* These users will also display as an option when using the optional workflow for additional distribution of invoices.

External User – Billing Address:

**How to edit the billing address on a specific project request:**This will allow the new billing mailing address to display on any invoice tied to this specific project request. However, it will not apply to all billing if the core enters more than one project.

1. Go to the “View All Requests” tab of the core site. | Toggle open the customer’s project request.
2. Scroll down to the Billing Information section. (Located under comments & service request history.)
3. Click edit next to the Billing Information header.
4. Update the billing information to reflect the correct information. This information will display on the invoice.
5. Click Save to finalize the changes.

**NOTE:** To change on all invoices for this user’s lab group, submit an iLab ticket. See the “Troubleshooting page” for recommended ticket language.

External User – Access to log into iLab:

**How does an external customer access VUMC iLab application?** External users may need to login to iLab to either view invoices or to request core services (depending on core’s workflow). Users may need to access a custom URL to view the VUMC core groups if their institution currently uses iLab to manage their institutional core billing or operations.

1. **Users from an institution that do not currently use iLab**: <https://vumc.corefacilities.org>
2. **Users from institutions that are a client of iLab**:
	1. Instruct user to use their institution’s iLab website to login to iLab.
	2. After logging the user can then navigate to invoices or the VUMC core iLab site, as needed.

TROUBLESHOOTING: Contact iLab Support to manage external lab groups:

**iLab Support:** To submit a ticket, email **ilab-support@agilent.com**To change an external lab group, the **PI will need to be copied an iLab help ticket**

**To change the email address where the automatic invoice email is sent.** **Submit iLab ticket and copy the external PI.**

Ticket Message (*recommended language)*:
Please add the following individual as a Financial Manager to following lab group in iLab.
 PI’s Lab Group Name:

Please set this financial manager as the ‘**Lab Primary Contact’.** This person will need to receive the invoice notification email.
 (1) Financial Contact Name:
 (2) Financial Contact Email:

**To add Financial Managers to existing lab groups: Submit iLab ticket and copy the external PI.**

NOTE: If that person needs to be set as the invoice owner, in the iLab support ticket request to add the person as “**Lab Primary Contact**”

Ticket Message (*recommended language)*:
 Please add the following individual as a Financial Manager to the following lab group in iLab.
 (1) User’s Name:
 (2) User’s Email:
 (3) PI’s Lab Group Name:

**To update billing mailing address: Submit iLab ticket and copy the external PI.:**

Ticket Message (*recommended language)*:
 Please update this lab’s billing address. This is the address that should display on the invoice.
 (1) PI Name:
 (2) PI’s Lab Group Name:
 (3) New Billing Address:

**Accounts Receivable Review & Marking Invoices as Paid**
Cores are responsible for managing the AR for all external invoices. Upon request of the core, Office of Research will mark invoices as paid. Work with your assigned Office of Research Core Administrator for assistance with marking invoices as paid.
 **Payment Methods:** VUMC can accept payments by check or electronic fund transfer. Unfortunately, we are unable to accept credit card payments.

 **Credit Card Payment Options:** Effective Jan. 1, 2015, VUMC stopped accepting credit cards as a form of payment for core charges due to increased PCI Compliance requirements. Cores that opt to obtain their own PCI compliance and purchase a credit card processing machine are allowed to accept credit card payments.
Guidelines include:
 (1) Core leadership/ home department are responsible for maintaining PCI compliance and procuring
 credit card processing machine.
 (2) Payment should only be accepted after monthly invoice has been generated. Pre-payments are not allowed.
 (3) Core leadership/ home department are responsible for preparing & submitting journal entries to
 record credit card transactions.