iLab

Core Managers: Managing Equipment Reservations & Calendars

Questions? Contact VUMCcores@vumc.org

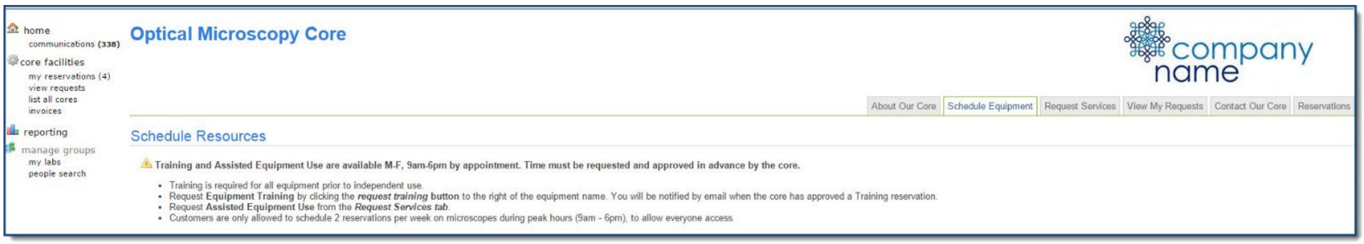
Resource Calendars

Cores utilizing the iLab Calendar Workflow functionality should reference this guide on full system behavior and procedures.

Resource Calendars – Scheduling Equipment

Core customers can reserve time on resource calendars directly on the core's iLab site by viewing the ***Scheduled Equipment*** *Tab.*

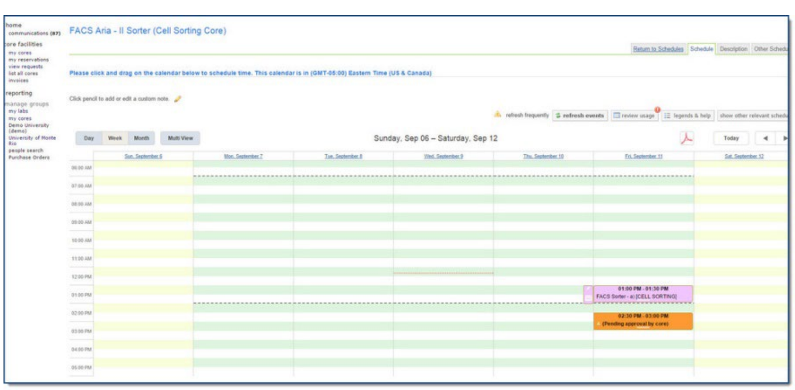
- Once the ***Schedule Equipment*** page, there will be a list of available resources (instruments or rooms) for customers to reserve.
- Customers can initiate a reservation request by clicking the ***View Schedule*** button and then selecting the reservation time frame on the calendar.



Reading the calendar:

The calendar will display events in various colors for easier reading. Events are color-coded on the calendar to quickly determine the status of the appointment. The color legend for events is as follows.

- ***Green Events:*** Your future reservations
- ***Yellow Events:*** Your past reservations
- ***Red Events:*** If the equipment is unavailable for selected amount of time
- ***Orange Events:*** In some cases, cores require core approval for reservations. If you have reserved time on the calendar that requires core approval, that event will be in orange. When the reservation has been approved you may receive an email and you will see the event turn to purple.
- ***Purple Events:*** When a reservation is approved by the core it will turn purple.

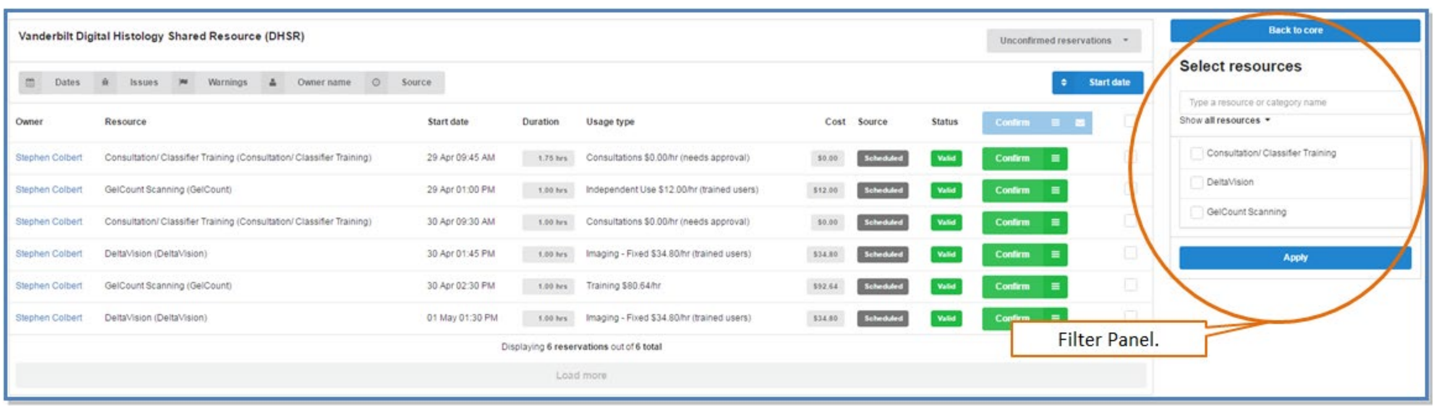


Confirm Equipment Usage

- The core is **<u>required</u>** to confirm all equipment usage prior to creating the monthly billing event. <u>If usage is not confirmed</u>, the resource usage <u>charges will not be processed</u>.
- It is recommended to confirm the usage on each calendar at least weekly or daily depending on the number of reservations typically processed by the core.

To review usage:

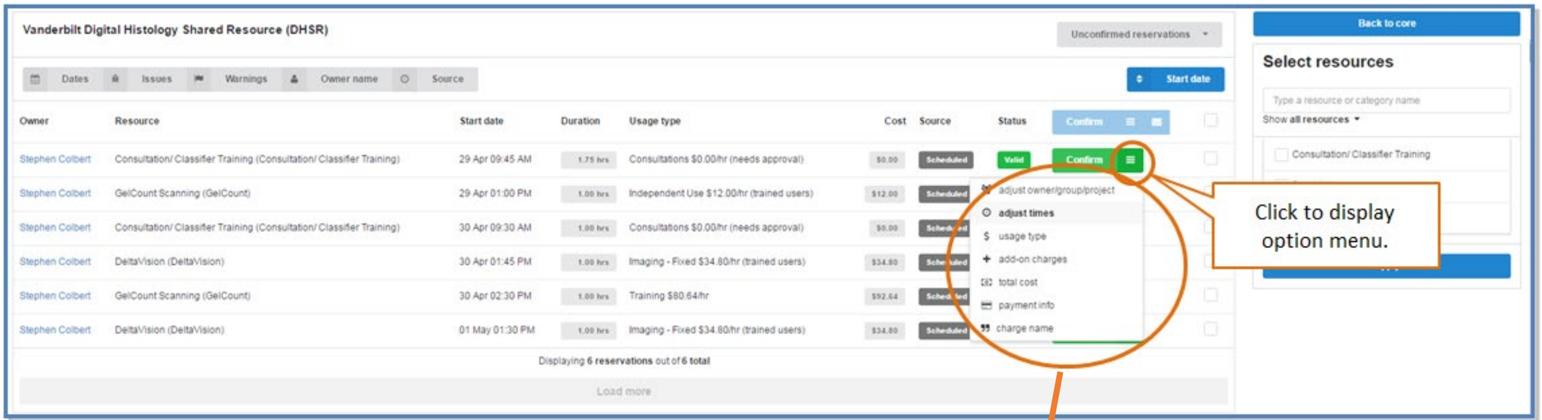
1. Select the ***Schedule Equipment*** tab, an alert icon will display on resources with reservations pending confirmation.
2. Click on the ***Confirm Usage*** button at the top of the page to confirm the pending usage for <u>all instruments</u> at one time.
3. The ***Confirm Usage*** page will open.
4. Use the **filter panel** on the right-hand side to filter to view a specific instrument(s).
5. Review the usage.



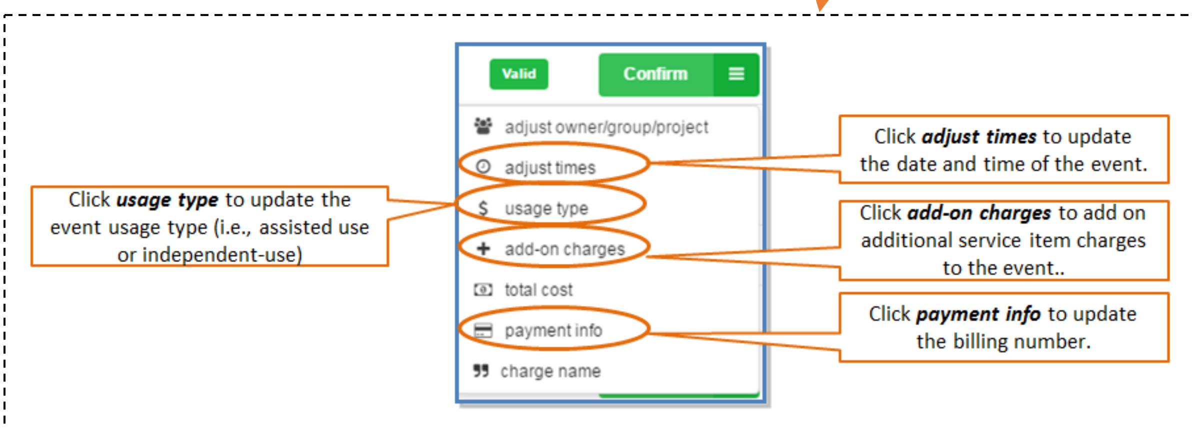
To update payment information, usage times or usage type for specific events:

Changes to a specific event can be made prior to confirm the event.

- Click the **options** icon beside the ***Green Confirm*** box on the event line. An ***options menu*** will be displayed.

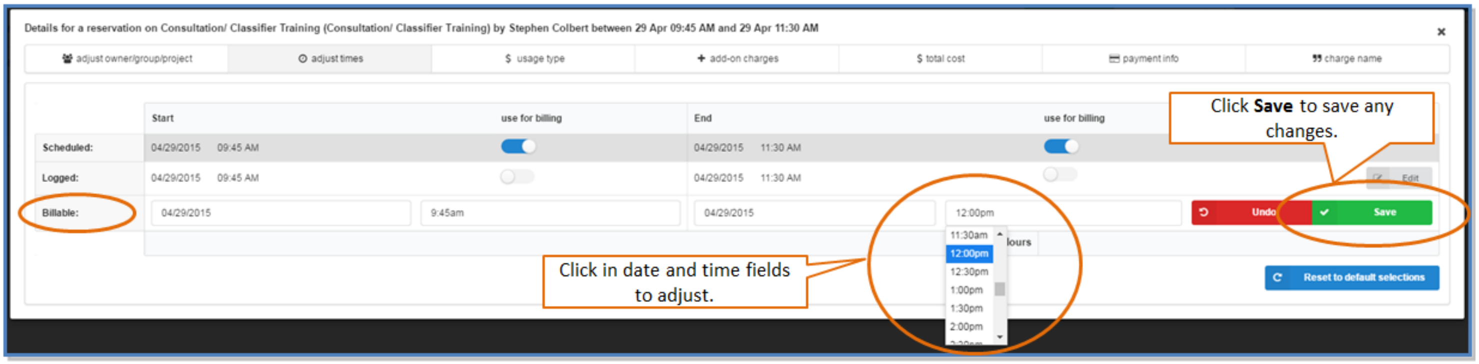


Options Menu:



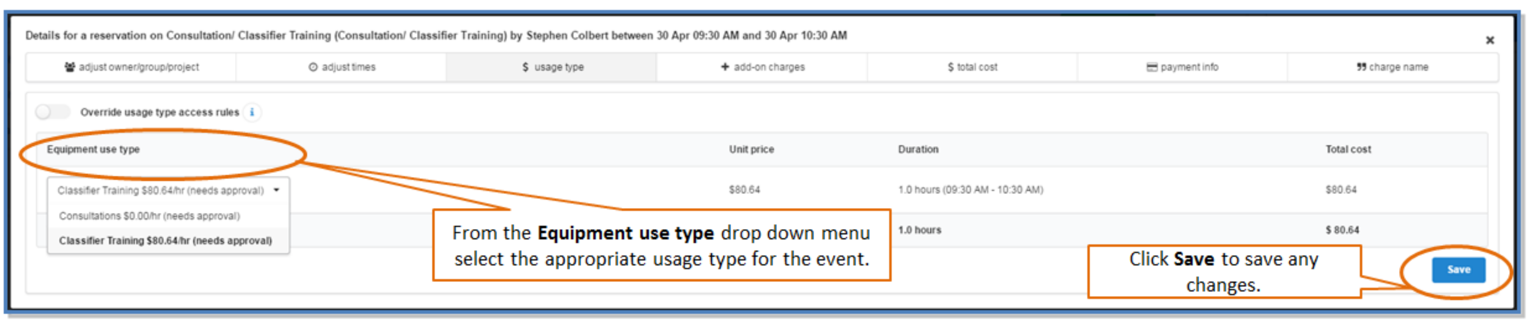
To **change the billable time** of an event: Options Menu >> ***Adjust Times***

1. An adjustment window will open.
2. Click ***Edit*** on the ***Billable*** line.
3. Click in the ***date*** and ***time*** fields to adjust. A drop-down menu will display.
4. Click ***Save*** to save the changes. The page will refresh, and the new time/date will display.
5. Close the window after you have saved the changes.



To **change the usage type** for an even: Options Menu >> ***usage type***

1. An adjustment window will open.
2. Select the applicable usage type in the drop-down ***Equipment use type*** field.
3. Click ***Save*** to save the changes. The page will refresh.
4. Close the window after you have saved the changes.

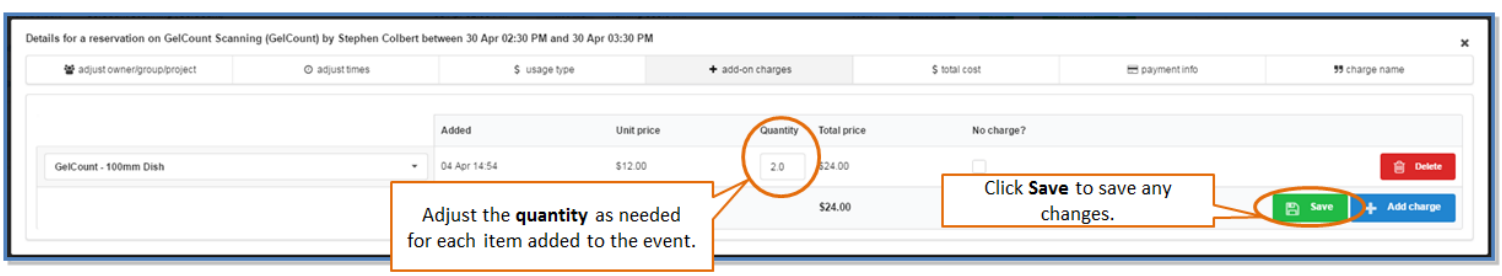


To **change the payment information** for an event: Options Menu >> ***payment information***

1. An adjustment window will open.
2. Select the new billing number in the drop-down ***billing number*** field.
3. Charges can be Split between multiple billing numbers by clicking ***split charge***.
4. Click ***Save*** to save the changes. The page will refresh, and the new payment information will display.
5. Close the window after you have saved the changes.

To bill **additional service items** associated with the event: Options Menu >> ***add-on charges***

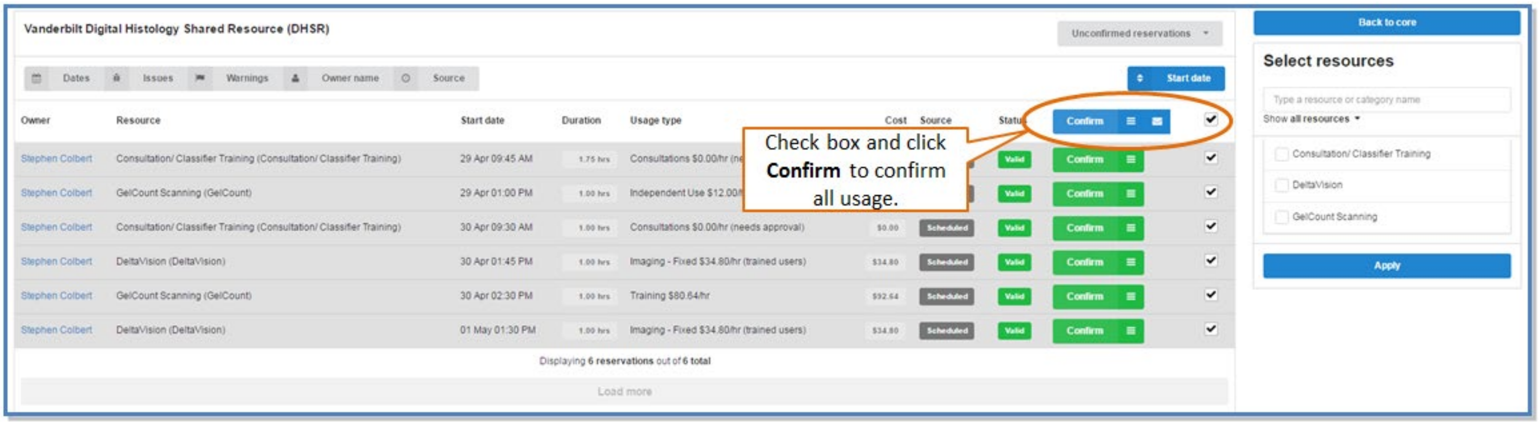
1. A new window will open.
2. Click **Add charge** to add on additional service items.
3. The ***Select Services*** box will display. Select the item from the drop-down price list that you wish to add.
4. Adjust the **Quantity** field
5. Click ***Save*** to save the changes. The page will refresh.
6. Close the window after you have saved the changes.



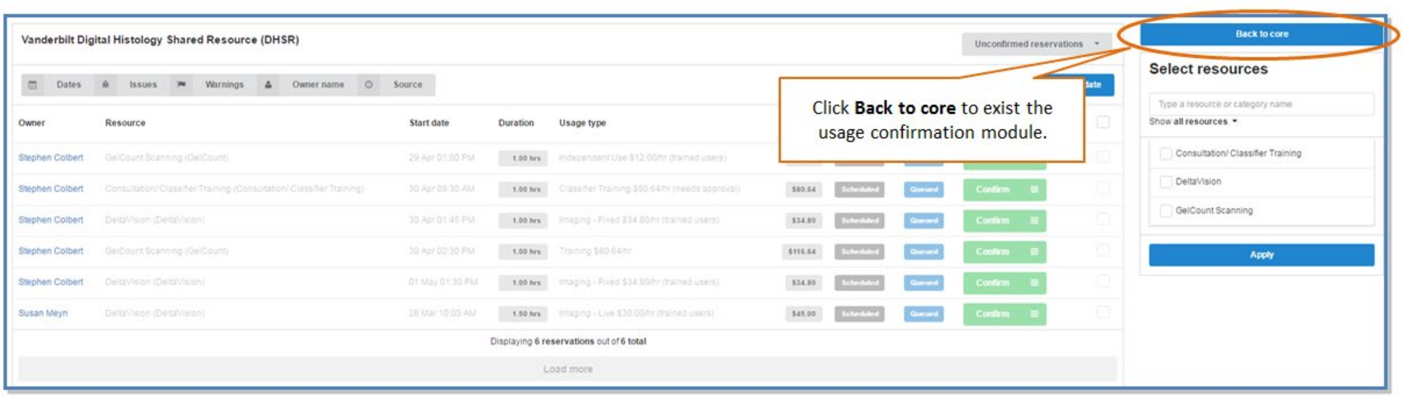
To confirm usage:

After the usage has been reviewed all necessary adjustments made, the events will need to be confirmed.

1. Click the **check all box** at the top of the page to select all events ready for confirmation.
2. If needed, uncheck the line item to hold the confirmation of a specific reservation/event.
3. Then click the ***Blue Confirm*** button.
4. This will confirm all selected reservations at once.



5. Click ***Back to Core*** on the left-hand side of the page to exit the usage confirmation module.



Managing Equipment Usage

Calendar settings are highly customizable depending on the needs of the core. Contact your Core AO for more details and changing your calendar settings.

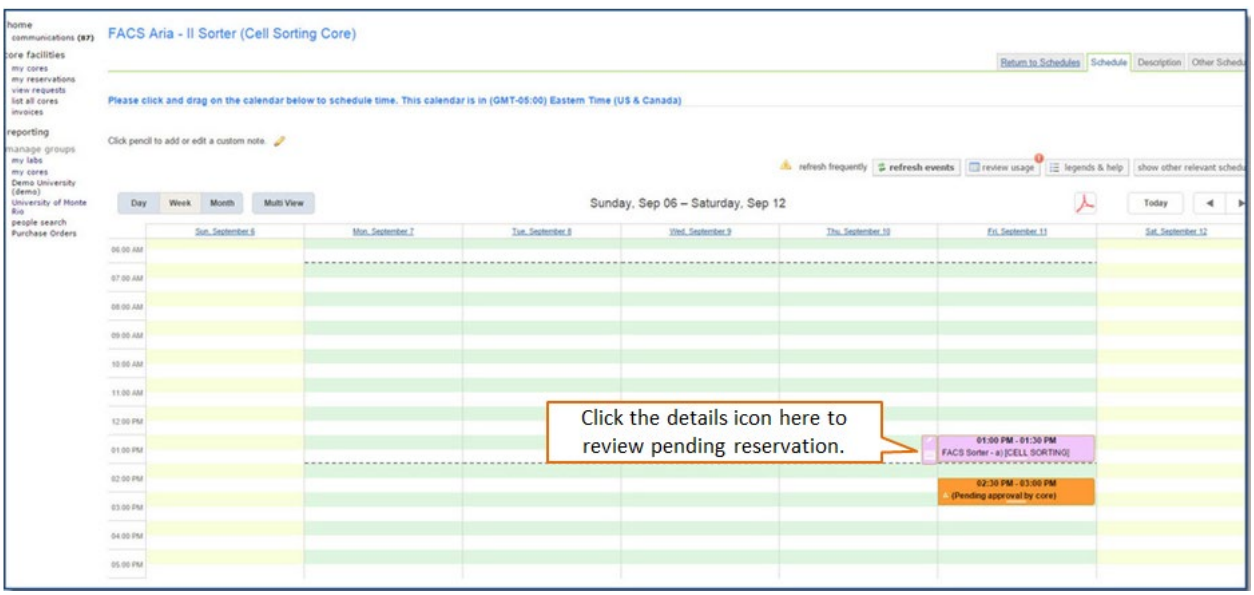
Options include:

- Requiring core approval of customer reservations.
- Allowing only trained users to reserve time.
- Setting different availability times for trained v. untrained users.
- Setting different rates for trained v. untrained users.

Approving pending reservations:

In some cases, cores require core approval for reservations. Please complete the following steps to approve pending reservations if the core's instrument is set up to require approvals.

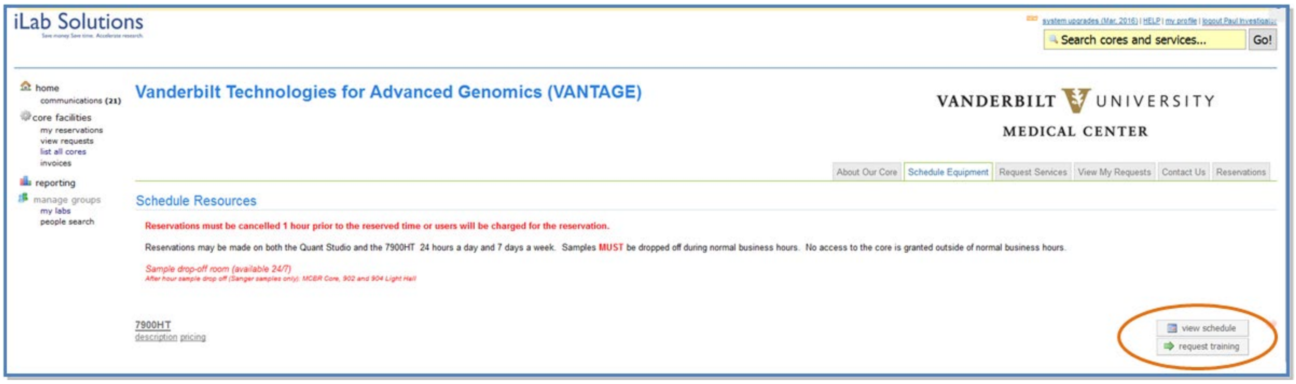
1. If the customer has reserved time on a calendar that requires core approval, that event will display in ***orange***.
2. Click the ***details icon*** on the pending reservation to view the reservation details.
3. Review the details and click ***Save & Approve***.
4. When the reservation has been approved, the event will display in ***purple***.



Calendars with trained users

In some cases, cores only allow trained users to schedule time on specific instruments.

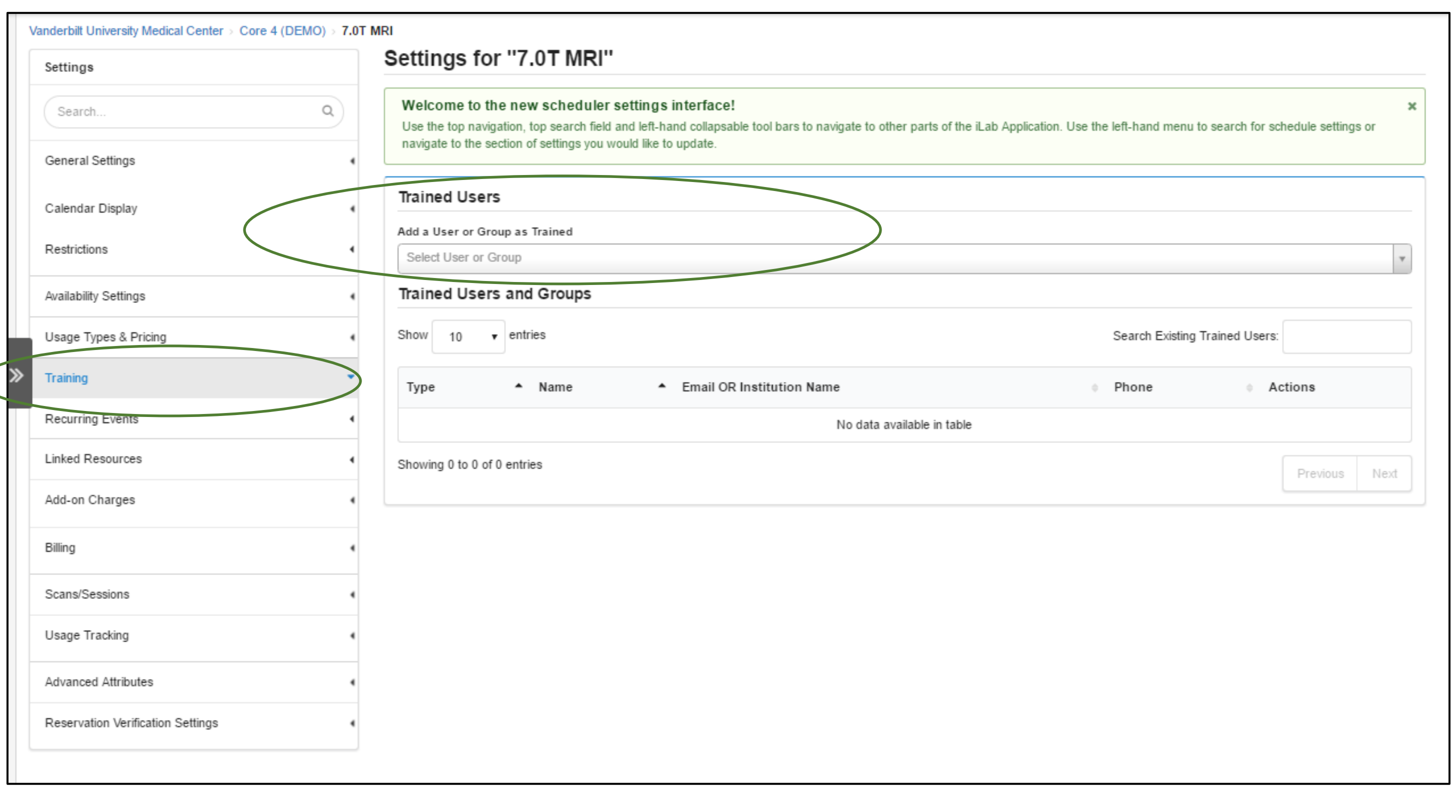
- If the user has access to the calendar, the user will be able to select view schedule and make a reservation.
- If the user does not have access, the user will need to select "Request Training" to request approval from the core to use the instrument.
  - NOTE: "request training" tool is an optional feature.



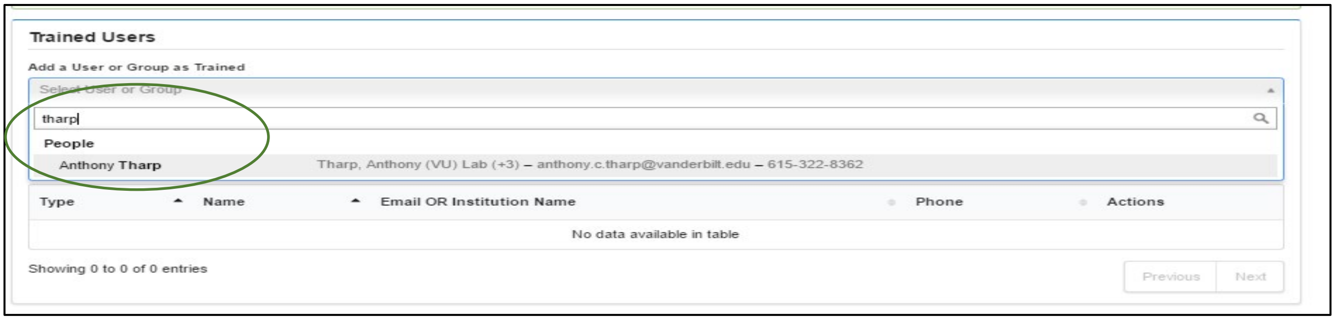
To grant approval for a trained user:

Option 1: Add trained users per instrument.

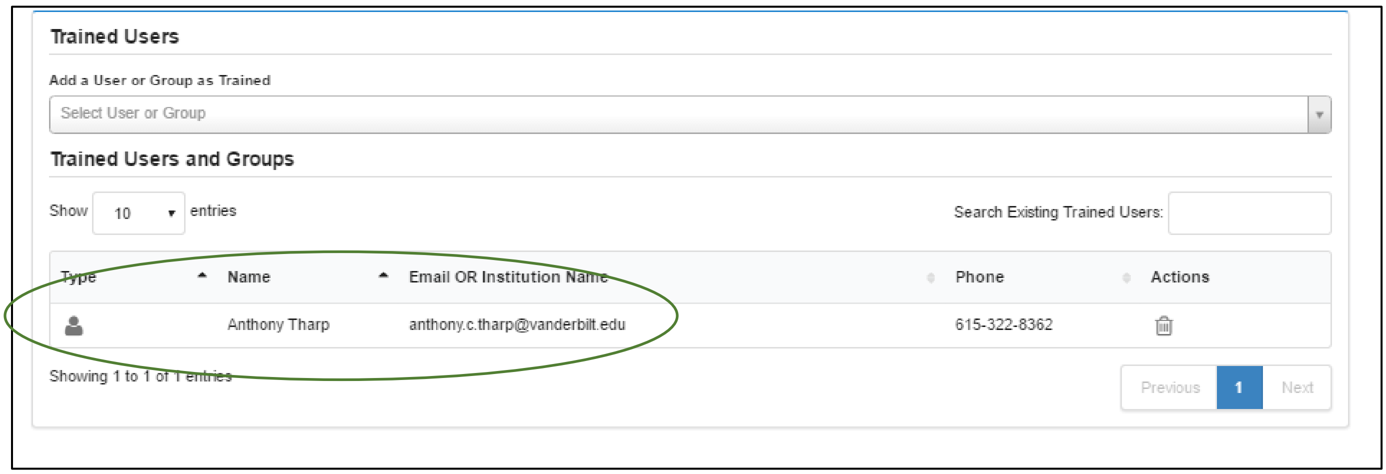
1. Navigate to the **Schedule Equipment** Tab.
2. Click the ***blue pencil*** next to the instrument to open the instrument settings.
3. In the ***Trained Users*** section, locate the ***Add a User or Group as Trained*** field.



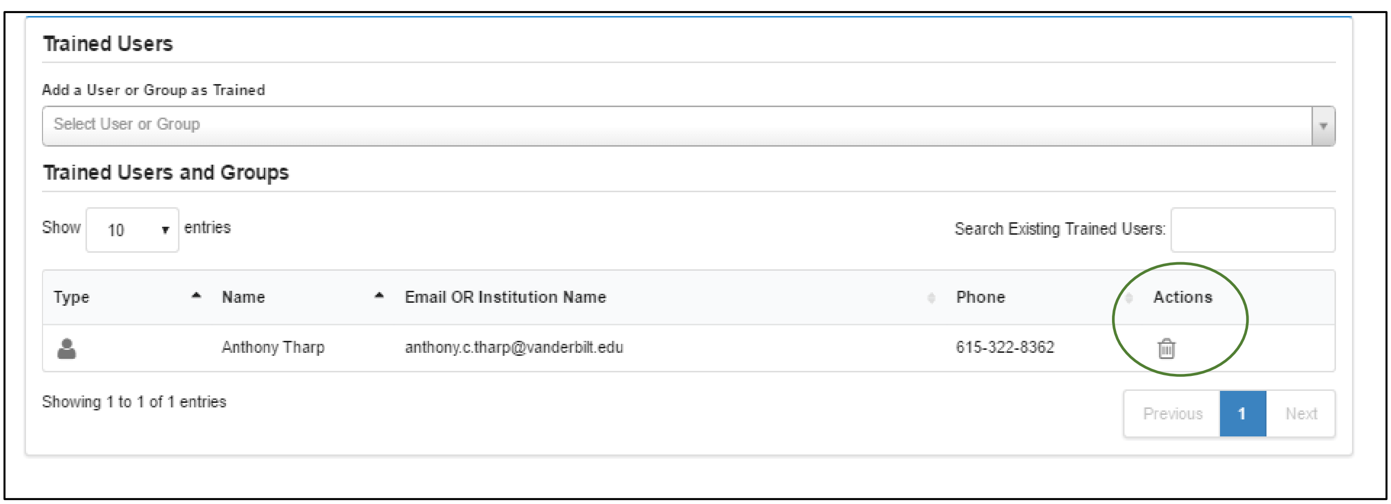
4. Search for the new user by entering the name of the user in the ***drop-down field***. As you start typing, usernames will display. | Select the user's name.



5. After the name selected, the user will be listed in the "**Trained Users and Groups"** list.

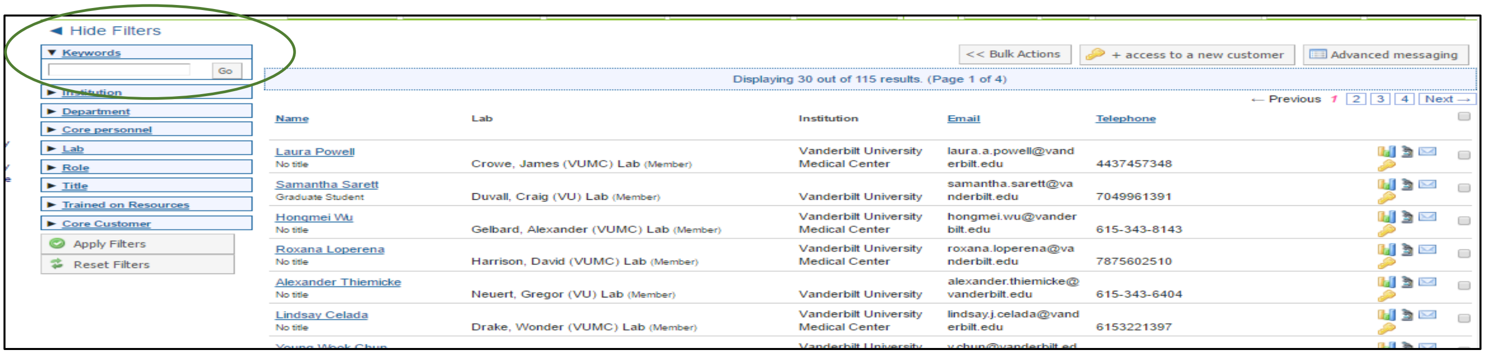


6. To remove trained user access, click the **trashcan** icon next to the user's name.

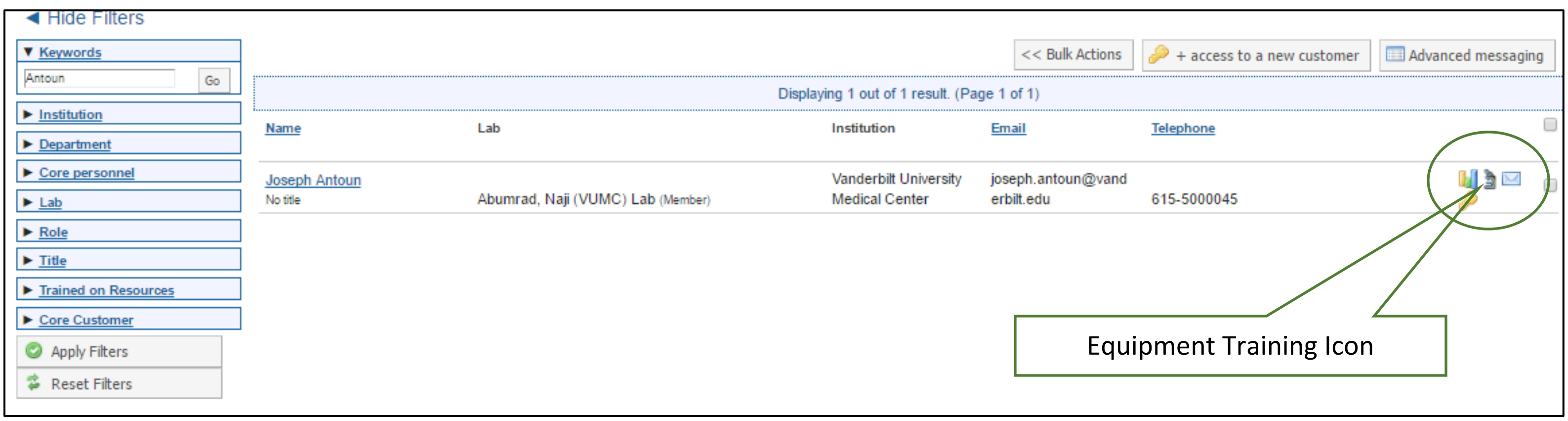


Option 2: Grant access to multiple instruments per user using the People Tab.

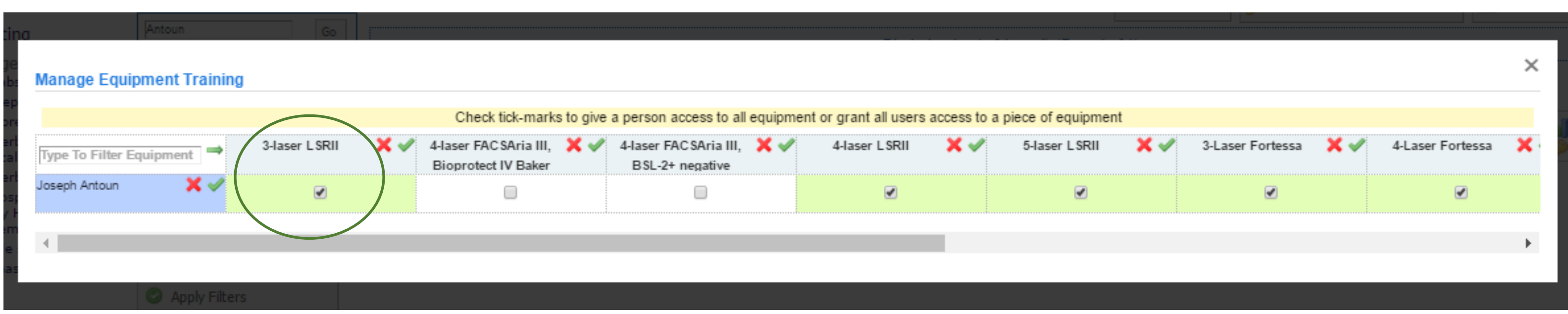
1. Navigate to the **People** Tab.
2. Search for the user by entering their name in the **Keywor**d box in the **left-hand filter panel**. Click "**Go**" to search for the user.



3. Click the **Equipment Training** icon next to the user's name.



4. The **Manage Equipment Training** window will display. **Check the box** under each instrument.
   a. The **box will turn green** to indicate the user is now added as a trained user.
   b. Click the **Grey X** to close the window.



Next Steps

- All events completed via the calendar workflow process – will display as an option next time the core generates a billing event.
- Consult the iLab Core Manager User Guide for instructions on billing events, viewing invoices, refunds, and other system behavior.

Requesting an Equipment Reservation on behalf of a user

Most cores allow their customers to request reservations directly on the core's iLab site. However, Core personnel can request reservations on behalf of a user when needed.

1. Access your core's site. 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 the reservation.
4. Select the user by entering the name of the person for which you wish to make the request and click the ***Proceed*** button.
   a. Note: Make sure you are searching within "this institution" or "all" if you are looking for a user that has not yet used the core.
5. Complete the submission 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.
6. In the ***payment information*** section, select the correct billing number from the ***drop-down menu***.
   a. Split Charge: The cost of equipment usage can be allocated across billing numbers.
      i. To allocate across multiple billing number, click ***split charge***.
      ii. Select the additional billing number from the drop-down menu.
      iii. Enter the % allocations to split the cost across the billing numbers.
   b. Billing number Notes:
      i. Lab members will need to be granted access to activated billing numbers by the PI and/or the Lab Manager.
      ii. PI or Lab Managers will need to contact the department administrators to claim new billing numbers in iLab.
7. Select ***Save Reservation*** button at the bottom of the page to submit your reservation request.