

iLab Core User Guide

System Role: Core User
VUMC Office of Research

Revised: February 2024

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Registering For iLab

Instructions for VUMC PIs, Lab Managers, and Lab Members

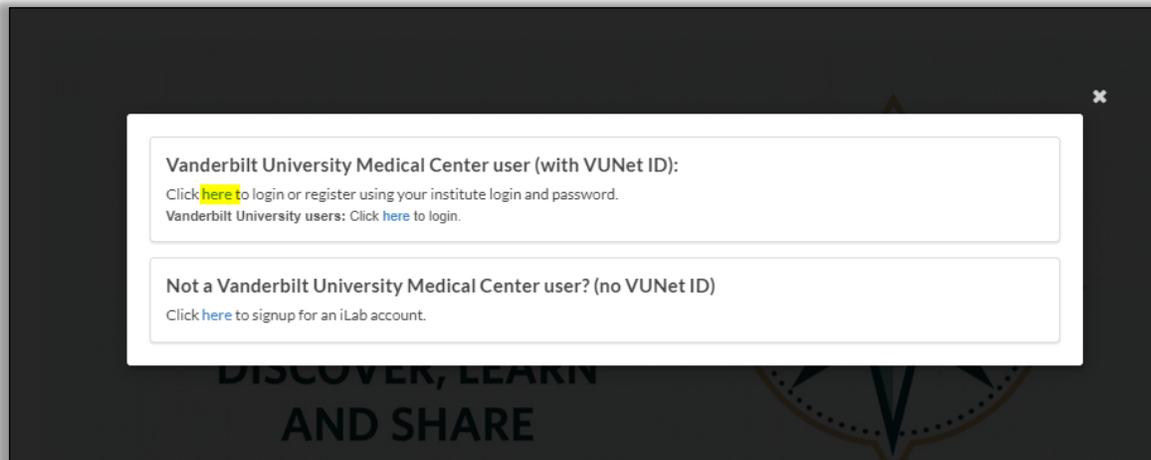
VUMC Users (PIs, Lab Managers, & Lab Members) **must register for an iLab account** before being able to access VUMC Cores in the iLab System.

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**.

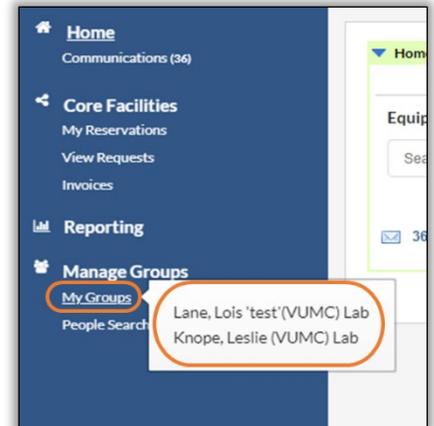
VUMC Research Staff (PI, Lab Manager, Lab Member)	<ul style="list-style-type: none"> • Select your PI’s lab group. • If your PI’s lab group is not listed or you are a new PI, select the AAA (Default) VUMC Lab
VUMC Department Administrators:	<ul style="list-style-type: none"> • Select the Admin (VUMC) 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**, 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.
◦ 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.
• 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.

1. Search box:

2. User selection:

3. Role dropdown:

4. Invite button:

Lab Group Roles

Principal Investigator (PI)

- View available fund numbers.
 - Grant worktags – PI **automatically** has access via Workday nightly feed.
 - All other funds (Gifts, Programs, and Cost Centers) – Billing numbers will need to be **claimed** by a department administrator. 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, gifts, or program worktags into the PI's Lab Group

Adding a PI Lab Group to a VUMC Department Module

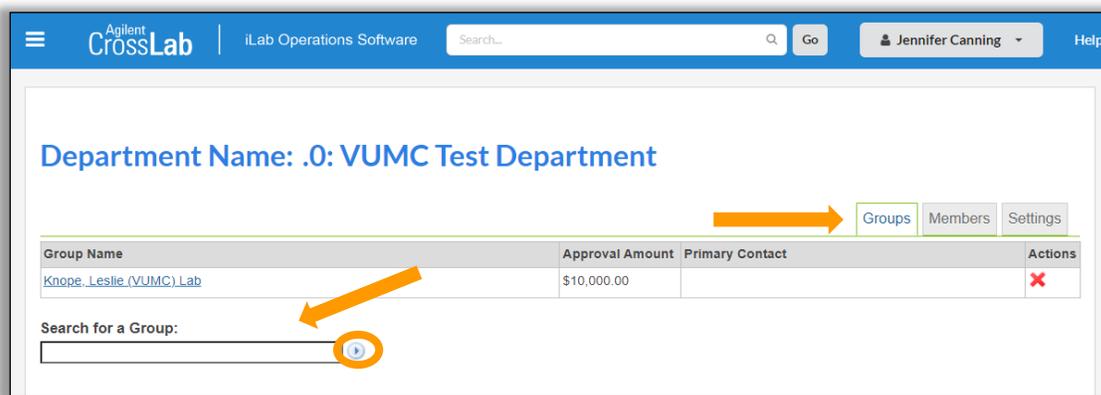
Department Administrators can add and remove PI lab groups from their department's module(s).

Key Points

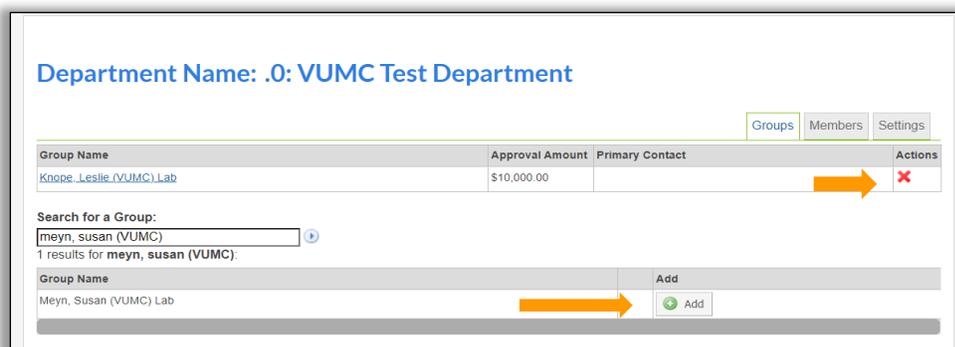
- A PI lab group should only be added to a department if it is that PI's "Home Department".
- Only "VUMC" Lab groups can be added to a VUMC department module.

Instructions for Department Administrators:

1. Navigate to the department module under the "My Departments" section in the navigation panel.
2. Click on the "Groups" tab.
3. Search for the PI lab group within the "Search for a Group" search box.
4. Click on the "arrow" to the right of the search box to begin the search for the lab.



5. Click the "Add" button to the right of the PI lab group name to add them to the department.
 - To remove a lab group from the department, click the red "X" to the right of the PI lab group name in the "actions" column.



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.
 - Grant worktags cannot be claimed into PI lab groups.
- 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, Program, 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, Program, or Cost Center) type in the billing number exactly as it appears in Workday and hit **Request**.
 - i. **NOTE:** Grant worktags are automatically assigned to a PI lab group via nightly fund import. Grant worktags cannot be manually claimed into a PI lab group. PI assignment is managed in Workday.
5. Once the number has been claimed, lab member access (**including the PI**) will need to be **granted access** before the billing number can be used.

▼ 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
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="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 billing 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 billing 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 (gift, grant, program, cost center, voucher, scholarship fund)

Knope, Leslie (VUMC) Lab

Membership Requests & Billing Numbers | Members (16) | Budgets | Bulletin board (25) | Group Settings

Membership Requests

✓ No Access Requests require approval

Manage Billing Numbers

▶ Customize Billing Number Grid

▼ Billing numbers

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	GF00001	S-DDRC (6/1/21 to 5/31/22)-374 (100.00)	S-Date Test 3-1307027 (100.00)	S-FY18 Scholarship Balance Test-1363029 (5,000.00)	S-FY18 Scholarship Training-1363055 (5,000.00)	S-FY19 Test-2022811 (1,000.00)	S-OOR (7/1/17 to 6/30/18)-1240063 (5,000.00)	S-OOR Test Scholarship - VU Demo-1165584 (5,000.00)	S-S-JC Test Scholarship -3630167 (50.00)	S-Test Emails (Exp 1.23.20)-2880542 (600.00)	S-Test Scholarship Allocation 3-1138553 (1,000.00)	S-Test Scholarship Allocation 4-1149371 (100.00)	S-Tiffany Scholarship Testing-1891322 (50,000.00)
Leslie Knope	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Arya Stark	None	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>

Assignee ID Notes

No action is required to activate Assignee ID worktags in iLab. All available Assignee IDs are populated into iLab each night from Workday. When placing an order or a reservation request, when program worktags are selected as the payment number then an additional field will display. The user can select from a list of available Assignee IDs. There is additional detail on this feature later in this guide.

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.

NOTE: Charges from VUMC cores to VU billing numbers **cannot be split** between multiple billing numbers.

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 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.

Name	Default Billing Number	Voucher Number
Alisa Escue	None	V0000032307
Leslie Knope	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: [dropdown]

100.0%

Billing Number [dropdown]

- 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	4008007679	4040661122	4040662233	S-Date Test 3-1367027 (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	S-Test End Date (Exp 7/28/17)-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 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"/>	<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 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

Assignee ID Overview

No action is required to activate Assignee ID worktags in iLab. All available Assignee IDs are populated into iLab each night from Workday. The assignee ID can be selected on an iLab request or calendar reservation when paying with a **VUMC program worktag**.

- The assignee ID field will only display **after** a VUMC **program** worktag is selected as the payment number.
- All available assignee IDs will display as an option. The customer will need to ensure the correct number is selected. No additional access is required.
- Use of an assignee ID is **optional**.

Utilizing the Assignee ID on New Requests

Service Requests

1. Request the service as usual.
 - a. Be sure to select the **“VUMC” lab group** when submitting the request.
2. In the payment information section, select the program worktag.

Reminder: the assignee ID option is only available for VUMC program worktags and is not a required field.

The screenshot shows the 'Payment Information' section. It includes a heading 'You may supply the Billing Number (optional)' and a prompt 'Please enter the Billing Number'. There are three columns: '%', 'Billing Number', and 'Amount'. The first row shows '1' in the first column, '100.0' in the second, and '100.0%' in the third. The 'Billing Number' dropdown is open, with 'PG000001' selected and circled in orange. A '+ Split Charge' button is visible in the 'Amount' column. At the bottom, there is a text box labeled 'enter additional payment information'.

3. The assignee ID field will display after the program worktag is selected.
 - a. The assignee ID field is a searchable field. You will need to enter at least 3 characters to begin the search.

The screenshot shows the 'Payment Information' section. The 'Billing Number' dropdown is now set to 'PG000001'. Below it, the 'Assignee ID' dropdown is open, showing a search bar with 'AS0' entered. A list of assignee IDs is displayed, with 'AS0192856' selected. An orange arrow points to the search bar. The percentage field is still set to 100.0%. The '+ Split Charge' button is visible. The 'enter additional payment information' text box is also present.

4. Select the assignee ID that corresponds to the PI and program worktag selected on the request.

Note: all VUMC assignee IDs will display in this search. It is the customer's responsibility to ensure the correct assignee ID is selected for the PI and funding.
5. Submit the request.

Calendar Reservations

1. Start the reservation, by dragging and dropping on your preferred timeslot.
2. Select the PI's "VUMC" Lab Group.
3. In the payment Information section of the reservation screen, select your program worktag.
 - a. The additional field for assignee ID selection will display.

The screenshot shows the 'Payment information' section of a reservation form. It includes a table for 'Use and cost of reservation' and a 'Billing Number' dropdown menu. The dropdown menu is open, showing a list of billing numbers, with 'PG000001' highlighted and circled in orange. Below the dropdown, there is a checkbox for 'Use the same payment information for all add-on charges' and a '+ Split Charge' button.

Duration	Effective Rate	Amount	Use Type
1.0 hours	\$100.00	\$100.00	Default Usage type Base Rate
1.0 hours	Total Cost	\$100.00	Internal

4. To select an Assignee ID, begin to key in your assignee ID to search for the ID number.

The screenshot shows the 'Payment information' section of a reservation form. The 'Billing Number' dropdown menu is set to 'PG000001'. Below it, the 'Assignee ID' dropdown menu is open, showing a search bar with 'as0' entered and a list of assignee IDs. 'AS0192856' is selected and highlighted. An orange arrow points to the dropdown menu. Below the dropdown, there is a '+ Split Charge' button.

5. Select the assignee ID that corresponds to the PI and program worktag selected on the request.
 - a. Note: all VUMC assignee IDs will display in this search. It is the customer's responsibility to ensure the correct assignee ID is selected for the PI and funding.
6. Submit the reservation.

Additional Assignee ID Notes

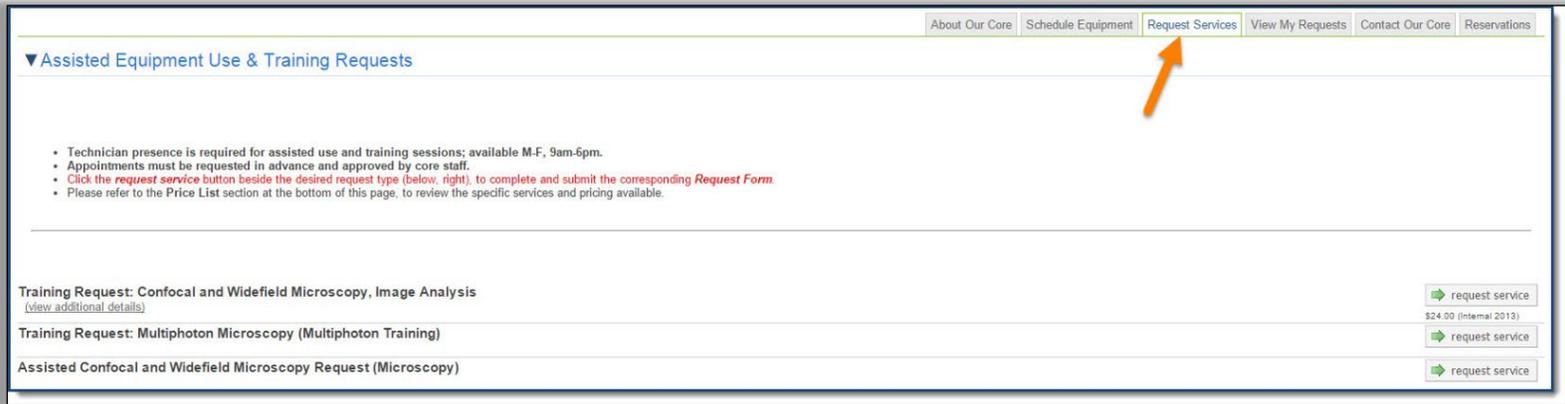
The assignee ID will not display on the iLab invoice but will be available for review on the service request or calendar reservation.

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. 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 submission form will open.



3. Complete the submission **form**. All required fields marked by a **red star**.

The screenshot shows the "1) Forms and Request Details" page. The form is titled "View Form: Consultation Request - CF-1272088-8". It contains the following sections:

- General Information:** Please complete the form. Type of Consultation Needed (check all that apply): General, Database, Research Protocol.
- Additional Details:** Describe Your Goals for the Consultation Session (text area).
- Sample Type:** Please load sample. Please Select One (dropdown menu), please upload (button).
- *IMPORTANT*** This is really important information about the consultation dates. Preferred Consultation Date (calendar icon), Secondary Consultation Date (calendar icon).

At the bottom, there are buttons: Please save your form! (green arrow), save completed form (green circle), save draft of form (blue square), lock and save form (yellow lock icon).

4. In the **payment information** section, select the correct billing number from the **drop-down menu**.
 - a. If the billing number is not available, contact your **lab manager**.
 - 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 activate new billing numbers in iLab**.

The screenshot shows the 'Payment Information' form. It has a header 'Please enter the Billing Number' with a help icon. Below this, there are three columns: '%', 'Billing Number', and 'Amount'. In the '%' column, there is a text input field containing '100.0' followed by a '%' sign. In the 'Billing Number' column, there is a dropdown menu with 'CC01383' selected. An orange arrow points to this dropdown. In the 'Amount' column, there is a 'Total Allocated' label with a help icon. At the bottom right, there is a button labeled '+ Split Charge'.

- b. **Split Charge:** The cost-of-service requests 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.

The screenshot shows the 'Payment Information' form with the 'Split Charge' button highlighted. The '%' column now has two rows: '1' with '75' and '2' with '25', both followed by '%' signs. The 'Billing Number' column has two dropdown menus: the first is 'CC01383' and the second is 'GF02324'. The 'Total Allocated' label is still present. The '+ Split Charge' button is now highlighted with a red circle.

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.

The screenshot shows the 'View My Request' tab in the iLab system. The header includes 'Core 4 (DEMO)' and 'VANDERBILT UNIVERSITY MEDICAL CENTER'. There are navigation links: 'About Our Core', 'Schedule Equipment', 'Request Status', 'View My Requests', and 'Contact Us'. Below the header, there is a search bar and a table of active requests. The table has columns for 'date', 'for', 'service.id', 'status', and 'cost'. The 'View My Requests' link is circled in red.

date	for	service.id	status	cost
May 19 (May 19 2016)	Paul Investigator Vanderbilt Testing (TEST) Lab	Q(EMO)-PI-117 Consultation	Waiting for Core to Agree	\$0.00 (\$0.00)
May 19 (May 19 2016)	Paul Investigator Vanderbilt Testing (TEST) Lab	Q(EMO)-PI-116 Equipment Training	Waiting for Core to Agree	\$0.00 (\$0.00)
Mar 29 (Mar 29 2016)	Paul Investigator Vanderbilt Testing (TEST) Lab	Q(EMO)-PI (CID) Consultation	Waiting to Submit to Core	\$0.00 (\$0.00)
Feb 16 (Feb 16 2016)	Paul Investigator Vanderbilt Testing (TEST) Lab	Q(EMO)-PI-97	Waiting for Core to Agree	\$0.00 (\$0.00)
Feb 16 (Feb 16 2016)	Paul Investigator Vanderbilt Testing (TEST) Lab	Q(EMO)-PI-96	Waiting for Researcher to Agree	\$08.00 (\$08.00)
Feb 16 (Feb 16 2016)	Paul Investigator Vanderbilt Testing (TEST) Lab	Q(EMO)-PI (CID)	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.

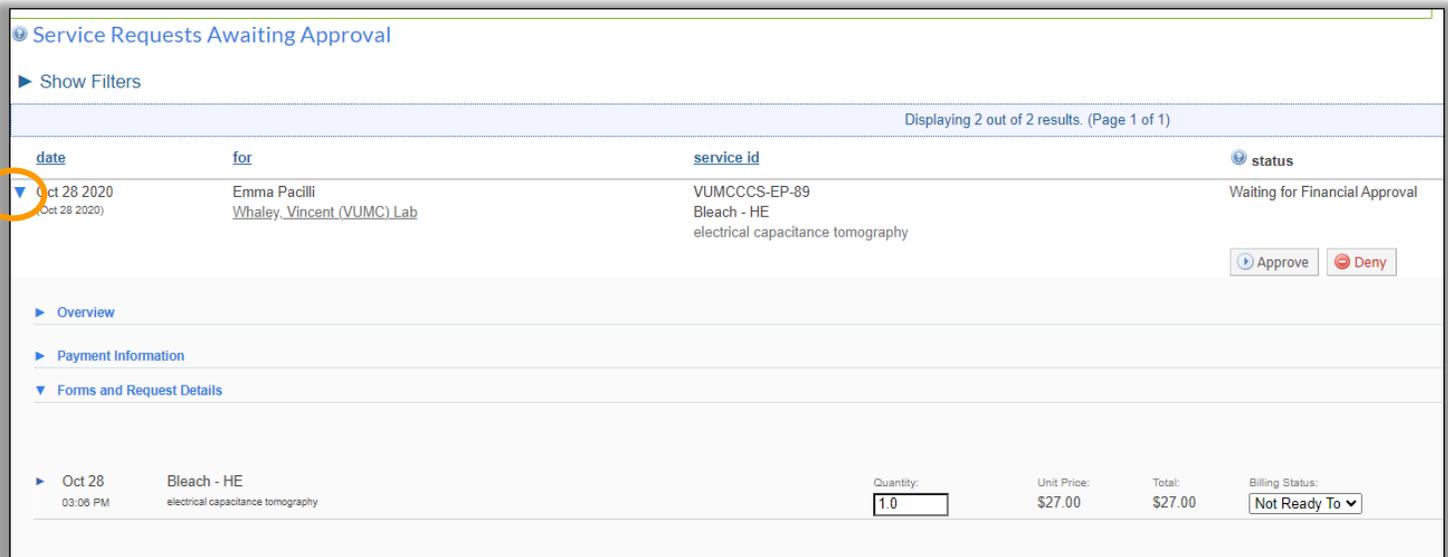
Approving a Request

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.

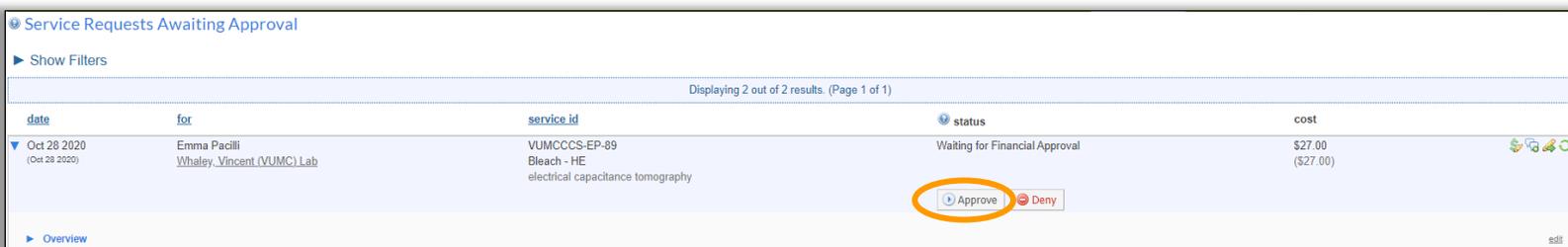
1. You can see all requests that require your approval by clicking on **view requests** under the core facilities section on the left-hand menu on any iLab page.



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

A screenshot of the 'Service Requests Awaiting Approval' page. The page shows a table with columns for 'date', 'for', 'service id', and 'status'. A blue arrow next to the first row (dated Oct 28 2020) is circled in orange. Below the table, there are expandable sections for 'Overview', 'Payment Information', and 'Forms and Request Details'. The 'Forms and Request Details' section is expanded, showing a table with columns for 'date', 'Bleach - HE', 'Quantity', 'Unit Price', 'Total', and 'Billing Status'. The 'Quantity' field is set to 1.0, 'Unit Price' is \$27.00, 'Total' is \$27.00, and 'Billing Status' is 'Not Ready To'.

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

A screenshot of the 'Service Requests Awaiting Approval' page, similar to the previous one. The 'Approve' button in the 'Forms and Request Details' section is circled in orange.

- 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.

<p>Oct 28 2020 (Oct 28 2020)</p>	<p>Emma Pacilli Whaley_Vincent (VUMC) Lab</p>	<p>VUMCCCS-EP-89 Bleach - HE electrical capacitance tomography</p>	<p>Waiting for Core to Begin</p>
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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.



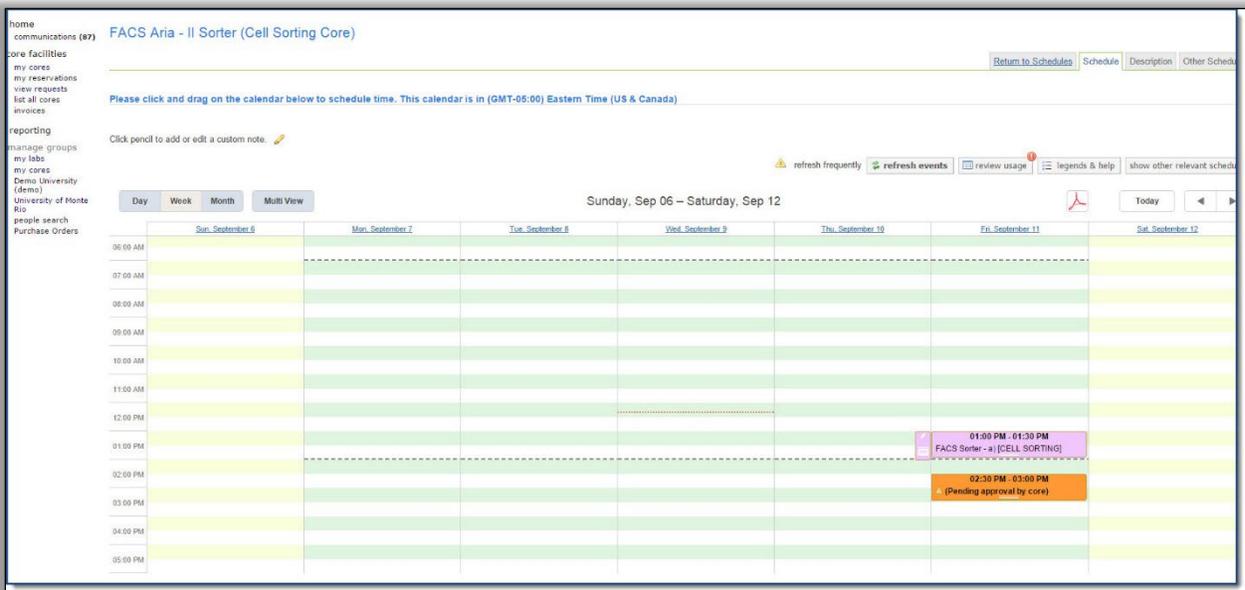
How To: Request an Equipment Reservation

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 web-based reservation form for 'LSM 510 Station 1'. The form is divided into several sections:

- Reservation details:** Shows reservation information like 'For: LSM 510 Station 1 - c) Assisted Use - Re...' and 'Created on: September 08, 2015 21:58'. A callout points to a 'Reserve time on a linked schedule and select a stage heater' instruction.
- Specify the required resource:** A dropdown menu is set to 'LSM 510 Station 1'. A callout says 'Be sure you have the correct resource selected.'
- Scheduled:** Shows dates and times: '09/10/2015 3:15PM - 09/10/2015 4:30PM'. A callout says 'Verify the date and time are correct.'
- Event Notes:** A text input field with a 'save' icon.
- Reserve time on:** A checkbox labeled 'Reserve'. A callout says 'By checking this box, you may also schedule this time on any related resources.'
- Repeating event:** A checkbox labeled 'Enabled'. A callout says 'You may choose to repeat this reservation on the schedule selected.'
- Use and cost of reservation:** Shows a price group 'c) Assisted Use - Re' and a total cost of '\$62.5 (1.25 hours)'. A callout says 'Select the appropriate price group.'
- Payment information:** Includes a 'PO Number' field and a 'total allocated' of '100.0%'. A callout says 'In some cases, the facility may request payment information.'
- Required forms:** A section titled 'Assisted Microscopy Details' with a red star icon. It contains a dropdown for 'Select microscopy system' and a large text area for 'Briefly summarize your microscopy requirements'. A 'Save Progress' button is present.
- Scheduling Details:** A note stating '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 located at the bottom.

5. In the **payment information** section, select the correct billing number from the **drop-down menu**.
 - a. If the billing number is not available, contact your **lab manager**.
 - 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 activate new billing numbers in iLab**.

The screenshot shows the 'Payment Information' section of a form. It has a header 'Payment Information' in blue. Below it, the text 'Please enter the Billing Number' is followed by a help icon. There are three columns: '%', 'Billing Number', and 'Amount'. In the '%' column, there is a row with '1' and a text input containing '100.0'. In the 'Billing Number' column, there is a dropdown menu with 'CC01383' selected. An orange arrow points to this dropdown. Below the input fields, it shows '100.0%' and 'Total Allocated'. At the bottom right, there is a button labeled '+ Split Charge'.

- b. **Split Charge:** The cost-of-service requests can be allocated across multiple billing numbers.
 - i. Charges cannot be split between multiple VU billing numbers.
 - ii. To allocate across multiple billing number, click **split charge**.
 - iii. Select the additional billing number from the drop-down menu.
 - iv. Enter the % allocations to split the cost across the billing numbers.

The screenshot shows the 'Payment Information' section with 'split charge' enabled. It has the same header and text as the previous screenshot. In the '%' column, there are two rows: row 1 with '75' and row 2 with '25'. In the 'Billing Number' column, there are two dropdown menus: the first has 'CC01383' and the second has 'GF02324'. Below the input fields, it shows '100%' and 'Total Allocated'. At the bottom right, there is a button labeled '+ Split Charge'.

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

The screenshot shows the 'Payment information:' section. It has the text 'Please enter the Billing Number'. There are two columns: '%' and 'Billing Number'. In the '%' column, there is a row with '1' and a text input containing '100.0'. In the 'Billing Number' column, there is a dropdown menu with '1040667890 - OOR Demo Ctr 2 (Does not expire)' selected. Below the input fields, it shows '100.0%' and 'total allocated'. At the bottom right, there is a button labeled 'split charge'. Below this, there is a section titled 'Invite additional people to this event by email' with a text input field. At the bottom, there are two buttons: 'Save Reservation' (highlighted with a red circle) and 'Cancel Changes'.

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 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. The main header features the text 'Vanderbilt Technologies for Advanced Genomics (VANTAGE)' and the Vanderbilt University Medical Center logo. A search bar is located at the top right. Below the header, there are navigation tabs including 'About Our Core', 'Schedule Equipment', 'Request Services', 'View My Requests', 'Contact Us', and 'Reservations'. The 'Schedule Resources' section contains several lines of text, including a red warning: 'Reservations must be cancelled 1 hour prior to the reserved time or users will be charged for the reservation.' At the bottom right of the page, 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 viewed in a 'Week (7 Days)' format. The reservation for Leslie Knope is highlighted in a gray box, indicating it has been approved. The reservation is for the time slot 10:00 AM - 11:00 AM on Wednesday, September 28, 2022. Other days in the week show 'Independent Use' for the same time slots.

	Sun, 25 Sep	Mon, 26 Sep	Tue, 27 Sep	Wed, 28 Sep	Thu, 29 Sep
08:00 AM		Independent Use	Independent Use	Independent Use	Independent Use
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					

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.

Who can view invoices in iLab Application?

- The invoice owner assigned for the PI's lab group will receive the email notice when an invoice is created.
- PIs or Lab Managers have access to view invoices charged to their PI's lab group.
- Department Administrators have access to invoices charged to their department's cost centers.

How to Review Invoices in iLab Application:

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.

Use the filter to reduce and sort your invoices

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	

Requesting a Refund

Contact the core directly to dispute an iLab invoice. The bottom of iLab invoices provide a core contact email address for invoice disputes. The core will review the refund request. If appropriate, the core manager will issue a refund via iLab. A unique iLab invoice will be created for the refund entry.

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 iLab Reporting interface. At the top, there are four buttons: "Load default" (with a green checkmark), "Load saved", "Build new", and "Reporting home". Below these is a "Report settings" section. It contains four main areas: 1. "1. Select a date range:" with "Start" set to "July 1, 2016" and "End" set to "September 2, 2017". 2. "2. Select date field:" with a dropdown menu set to "Completion date". 3. "3. Customize display:" with a button labeled "Charts and tables...". 4. "4. Apply settings:" with a button labeled "Run report!". Red boxes highlight the "Load default" button, the date range selection area, the "Completion date" dropdown, and the "Run report!" button.

Refining the Report

To refine the report and specify the data down to a certain PI, billing number (*VUMC billing 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.

The screenshot shows the Agilent CrossLab iLab Operations Software interface. On the left, a filter panel is highlighted with an orange border, containing various filter categories such as Core, Customer, Lab, Department, Institution, Organization, Center, Work status, Billing status, Ad-hoc charge justification, No charge justification, Price type, Billing event, Study, Billing event status, Payment Number (with a list of checkboxes), Payment Method, Service, Request Name, Vendor, Peer Review Status, Usage Type, Apply Filters, and Reset Filters.

The main content area displays a table titled "Services by week (by total cost)". The table has columns for Service and weekly dates from Jun 26, 2023 to Aug 21, 2023. The data is as follows:

Service	Jun 26, 2023	Jul 3, 2023	Jul 10, 2023	Jul 17, 2023	Jul 24, 2023	Jul 31, 2023	Aug 7, 2023	Aug 14, 2023	Aug 21, 2023
1-on-1 Training	\$0.00	\$0.00	\$0.00	\$0.00	\$36.00	\$0.00	\$0.00	\$0.00	\$0.00
Agilent Bioanalyzer - Equipment and R...	\$0.00	\$0.00	\$0.00	\$18.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Agilent Bioanalyzer - Full service (D...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Agilent Bioanalyzer- Equipment and Rea...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
BB02 - Leica stereoscope with camera	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Blades	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$128.75	\$0.00	\$0.00	\$0.00
Climbing Cylinder	\$0.00	\$370.00	\$0.00	\$0.00	\$13.00	\$0.00	\$0.00	\$0.00	\$0.00
Conditioned Place Preference	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Covaris Access Fee	\$0.00	\$0.00	\$0.00	\$0.00	\$1,350.00	\$0.00	\$0.00	\$0.00	\$0.00
DMEM without Glucose	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$0.00	\$370.00	\$0.00	\$18.00	\$1,399.00	\$323.25	\$0.00	\$0.00	\$0.00

The interface also includes a search bar, a "Show 10 entries" dropdown, and buttons for Save, Share, Email, Export, and Print preview.

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**.

Add, remove, edit and re-order charts and tables for this report

[Click here for help customizing reports](#)

Chart type	Group by	Value to report on	Display data by	Also group by	No-charge as \$0	Convert pie to bar if any values are negative	
Stacked bar	Core	Total cost	Week	None	Yes		X
Data table	Price type	Total cost	Week	None	Yes		X
Data table	Service	Total cost	Week	None	Yes		X
Data table	Study	Total cost	Week	None	Yes		X
Data table	Peer review status	Total cost	Month	None	Yes		X

Add a new chart or table **Apply** [Close and cancel all changes](#)

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.

Add, remove, edit and re-order charts and tables for this report

[Click here for help customizing reports](#)

Chart type	Group by	Value to report on	Display data by	Also group by	No-charge as \$0	Convert pie to bar if any values are negative
Data table	Billing status	Total cost	Month	Payment Nur	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Add a new chart or table **Apply** [Close and cancel all 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 billing 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 --

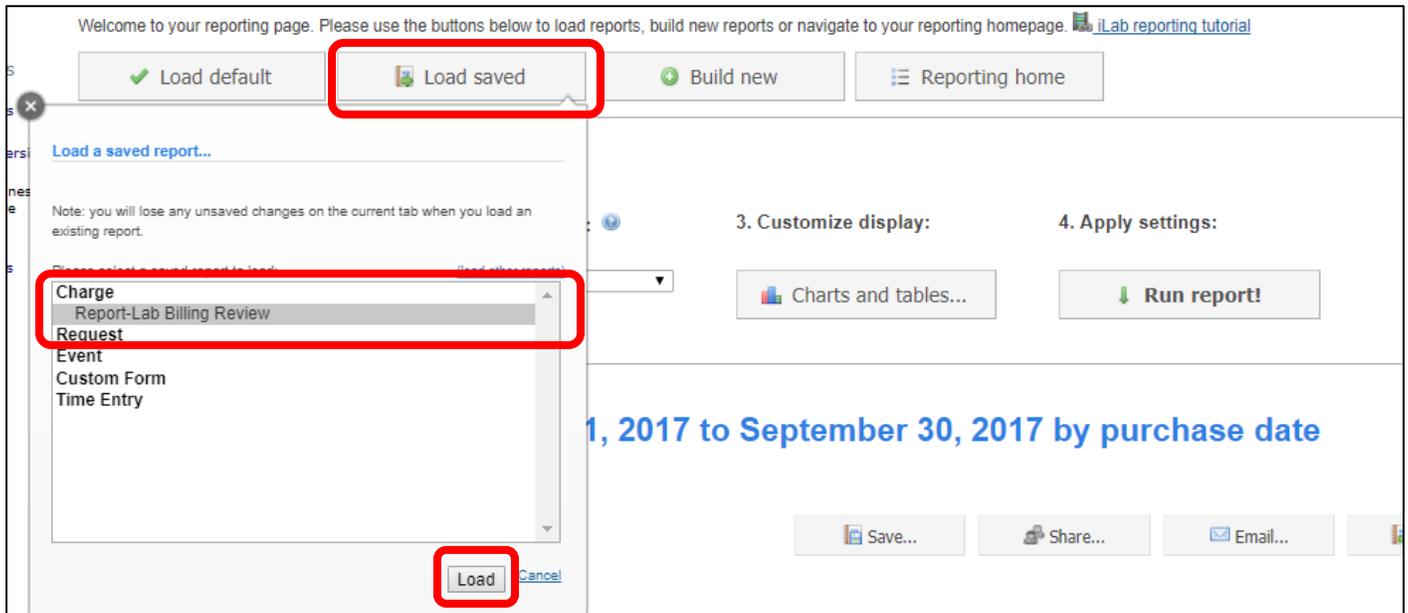
Overwrite an existing report: (select from a previously saved report below)

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

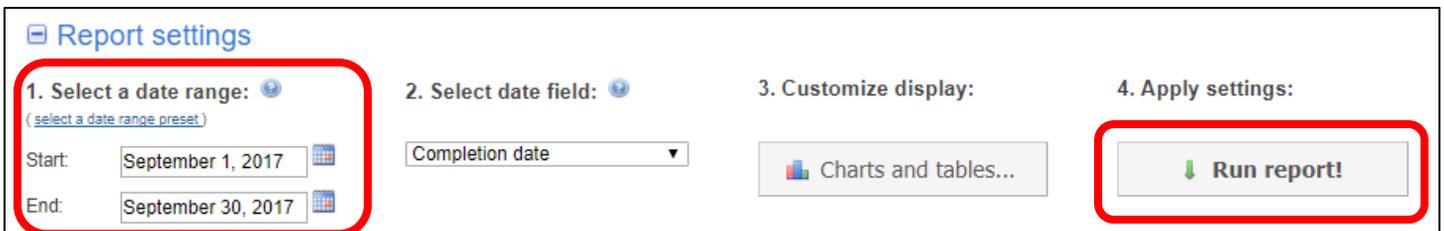
Save Cancel

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**.

