External User Management (iLab)

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iLab: External Customer Management

VUMC core managers are authorized to request accounts and POs (external billing numbers) directly in iLab for most external customers.

VUMC core managers should not create an account or PO (external billing number) for user from the following institutions. Contact OOR for help assisting these users.

- (VUMC) Vanderbilt University Medical Center
- (VU) Vanderbilt University
- (VA) Veteran Affairs

How does an external customer access VUMC iLab core group sites?

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: User’s institution iLab link (ex: https://wustl.ilabsolutions.com)
External Customer Invoice Distribution

All external invoices are distributed to the invoice owner and financial managers monthly during the closing process. This process is typically completed by the 10th business day the following month.

If the external customer requests additional staff receive the invoice notification email:

1. **Option 1:** Ask them to submit an iLab ticket. They will need to provide the users name and email address.
   a. **Ticket Message:** Please add the following individual as a Financial Manager to my lab group in iLab.
      i. (1) User Name; (2) User Email; (3) PI’s Lab Group Name

2. **Option 2:** Contact the VUMC Office of Research team at VUMCcores@vumc.org.
   a. The Office of Research can submit a ticket on the external user’s behalf. We will need the (1) individual’s name; (2) individual’s email address; (3) PI lab group name.

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.

- To request, please submit the following webform: “Request: Mark an iLab Invoices as Paid”
  o [https://www.vumc.org/or/Request-Mark-iLab-Invoice-Paid?_ga=2.34113507.338401336.1498483684-678992021.1498152684](https://www.vumc.org/or/Request-Mark-iLab-Invoice-Paid?_ga=2.34113507.338401336.1498483684-678992021.1498152684)

- Alternatively, the core can email a list of invoices to be marked as paid to VUMCcores@vumc.org.
HOW DO I ADD A NEW EXTERNAL USER?

Step 1- Complete Web Form on the VUMC Office of Research website.


B. VUMC Office of Research will:
   1. Register on behalf of the external PI (or verify he/she has an active iLab account).
   2. Once the account is active, OOR will add the institution to the core’s pricing panel and assign the applicable pricing group.
   3. Add a PO or billing reference number to the core’s site.
Step 2- Provide user with instructions on using iLab.
External users can begin placing orders and making reservations after the Office of Research has confirmed that:

1. The user account has been created by iLab.
2. The institution’s pricing group has been added to the core’s iLab site.
3. The user’s PO has been added to the core’s iLab site.

User Guides are available on the [Office of Research Website](#).

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**iLab User Guides for Core Directors and Staff**

- Introduction to iLab for Core Directors and Staff
- Managing and Confirming Equipment Usage in iLab
- Time Entry *(coming soon)*
- Refunds
- Charge Entry Billing Method

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- External Customer Management
- **Customer User Guide: External Users purchasing VUMC core services in iLab**
- Web Form Request: Add a New External User for your iLab Site
- Creating a Billing Event in iLab *(required monthly)*
- Resolving Billing Error Flags

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- Core Manager Guide to Customer Support
- iLab Webinars *(Editing, Site Management, Reporting)*
**ALTERNATIVE EXTERNAL USER ACTIVATION PROCESS:**

Core completes registration process directly in iLab.

Some cores prefer to manage the external usage activation without the assistance of the Office of Research. In this situation, the core does not complete the webform. Instead, they either (1) ask the user to register directly in iLab or (2) they register on behalf of the external customer.

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

1. Verify the external user does not already have an existing iLab account.
   a. To search to see if the external user already has an account, attempt to add a PO.
   b. Click Purchase Orders in the left-hand menu, start the process to add a PO for the user.
      i. To check:
         1. Click “+ New Purchase Order” button
         2. In the “Who are you creating this purchase order for?” box enter the external customer’s name.
            a. Important: Uncheck the “Search for Current customers only” box.
            b. TIP: Try searching by last name, first name
            c. And Try searching by first name last name
      ii. If name appears, the user has an account.
          1. Skip to step 3 for instructions on how to create the PO.
      iii. 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.

2. Log out of iLab. On the log-in screen, select **sign up**.
3. Under “Not a VUMC or VU user? (no VUNetID)”, click here to signup for an iLab account.

4. Complete the Start section.
   a. Enter the external PI’s email address.
   b. Follow all remaining prompts.
5. Complete the **Personal Information** section.
   a. List the **PI’s name** and phone number in this section.
   b. Enter in the external institution’s name.
      i. If it doesn’t already exist, (create new) will display beside the institution name that is typed in.
   c. Select “Principal Investigator” as the primary role.

![Personal Information Form](image-url)
6. Complete the **Group Associations** screen.
   a. If the institution is new for iLab, “Create New Group...” will pre-populate for the lab group question.
   b. The PI First name, last name, email address, and phone number will pre-populate.
   c. Answer **YES** to the “Is there another person in your lab who helps manage...” question?
      i. Complete the Financial Administrator’s details. (This is the billing contact)
   d. The “Your Group’s Name” will pre-populate.
7. Complete the **Billing Information** screen.
   a. Enter the billing contact details again on this screen.
   b. Don’t check the “Add shipping address...” box.

8. Click **Complete** to submit.
   a. A confirmation message will display.
Step 2: Search iLab to confirm iLab has created the external user’s account.
It typically takes at least 24-48 hours for iLab to create the external account.

1. To search to see if the external user already has an account, attempt to add a PO.
2. On the core’s iLab site, click the Purchase Orders tab.
   i. If name appears, the user has an account.
   ii. If name does not appear, the user does not have an account.
      1. Check daily until the account is created.
      2. After 2 days, submit a HELP Ticket

Step 3- Add & Approve a PO for the external customer.
IMPORTANT: This is only allowed for external users that are not from VUMC, VU, or the VA (veteran affairs).

1. On the core’s site, click Purchase Orders tab.
   a. On the right, click the + New Purchase Order button. A new purchase order window will display.

2. On the Purchase Order Details tab:
   a. Uncheck the search for current customers only box
   b. Enter the name of the PI in the search box and choose the correct user.
   c. Click Proceed
3. Complete remaining fields on Purchase Order Details tab:
   a. Number: Enter the customer’s assigned PO or billing reference number
   b. Name: Enter the description of the PO (if available).
      i. If not provided, leave blank. Field is optional.
   c. Initial Amount: Unless otherwise specified, use a large amount (e.g., 10000000)
      i. TIP: Do not enter commas in this field.
   d. Expiration Date: Unless otherwise specified, expire the PO one year from current date.
      i. TIP: Always choose the last calendar day of that month.

4. Before Saving: Click the “Share with Other Group Members” tab
   a. Group: Verify the correct lab group is selected.
      i. NOTE: A lab group will be selected by default based on the external customer selected above. Confirm this is the correct lab group before proceeding.
      ii. NOTE: Most external users (non-VU/VUMC) will only have one lab group.

5. Click Save & Approve to save the purchase order.
Step 4: Notify the Office of Research (OOR)

1. Email VUMCcores@vumc.org and provide the following information.
   a. Institution Name
   b. Price Type (For-Profit or Non-for-Profit)
   c. PI Name

2. The OOR will add the institution to the core’s pricing panel and assign the price type.
   a. If this is not completed, pricing will not display for the user when the core attempts to charge the PO.

3. The OOR will also ask iLab to activate the invoices link in the customer’s view of iLab.
   a. 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.