

External User Management (iLab)

iLab: External Customer Management	1
How does an external customer access VUMC iLab core group sites?	1
External Customer Invoice Distribution	2
Marking Invoices as Paid.....	2
HOW DO I ADD A NEW EXTERNAL USER?	3
Step 1- Complete Web Form on the VUMC Office of Research website.....	3
Step 2- Provide user with instructions on using iLab.....	4
ALTERNATIVE EXTERNAL USER ACTIVATION PROCESS: Core completes registration process directly in iLab.....	5
Step 1: Register on behalf of the external PI	5
Step 2: Search iLab to confirm iLab has created the external user’s account.	10
Step 3- Add & Approve a PO for the external customer.....	10
Step 4: Notify the Office of Research (OOR)	11

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”**
 - https://www.vumc.org/oor/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.

iLab Solutions

Click [HERE](#) to access VUMC's iLab Solutions site.



A part of **Agilent Technologies**

All users **must register for an iLab account** to access the application.

Click [HERE](#) to view the **iLab Registration Instructions**.

Webforms for iLab Core Customers:

- [Request an Update to your iLab User Account](#) (coming soon)
- [Request a VU Cost Center Update in iLab](#)
- [Request access to your VA Funding in iLab](#) (coming soon)

Webforms for iLab Core Managers:

- [Request a New External User for your iLab Site](#)
- [Request an update to a payment number on an iLab Invoice](#)
- [Request: Mark an iLab Invoice as Paid](#)

HOW DO I ADD A NEW EXTERNAL USER?

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

A. LINK: <https://www.vumc.org/oor/vumc-cores-ilab-solutions-transition>

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.

The screenshot shows the iLab Solutions website interface. At the top, there is a dark blue header with the text "iLab Solutions". Below the header, there is a light blue background with the following content:

- Text: "Click [HERE](#) to access VUMC's iLab Solutions site."
- Image: iLab Solutions logo with the tagline "A part of Agilent Technologies".
- Text: "All users **must register for an iLab account** to access the application."
- Text: "Click [HERE](#) to view the **iLab Registration Instructions**."
- Section Header: **Webforms for iLab Core Customers:**
- Text: "Request an Update to your iLab User Account (coming soon)"
- Text: "Request a VU Cost Center Update in iLab"
- Text: "Request access to your VA Funding in iLab (coming soon)"
- Section Header: **Webforms for iLab Core Managers:**
- Text: "Request a New External User for your iLab Site" (This link is highlighted with a red rectangular box in the original image.)
- Text: "Request an update to a payment number on an iLab Invoice"
- Text: "Request: Mark an iLab Invoice as Paid"

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](#).

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

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

Core Manager Guide to Customer Support

iLab Webinars (Editing, Site Management, Reporting)

ALTERNATIVE EXTERNAL USER ACTIVATION PROCESS:

Core completes registration process directly in iLab.

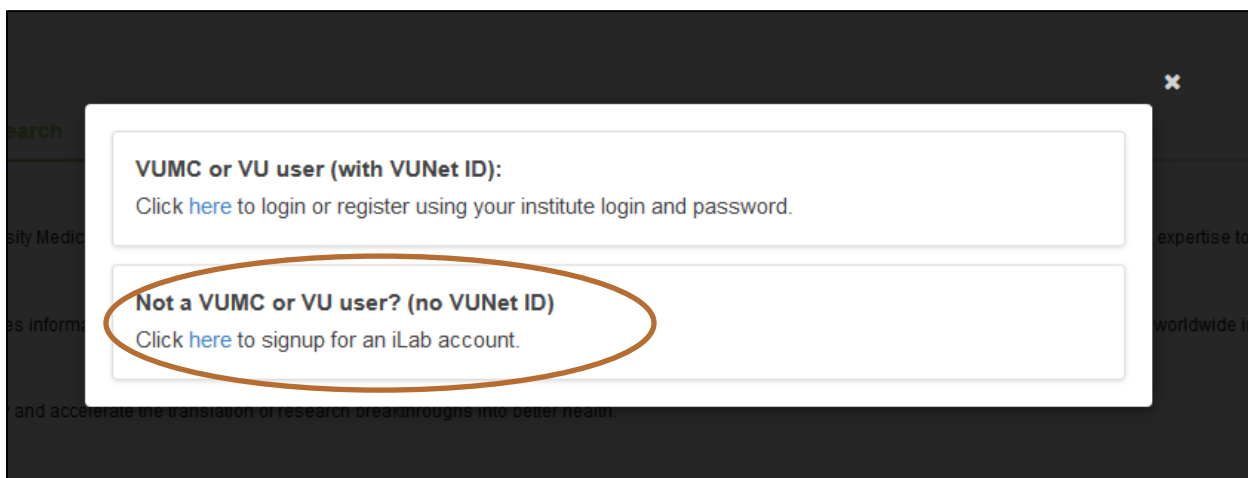
Some cores prefer to manage the external usage activation without the assistance of the Office of Research. In this situation, the core does not complete the webform. Instead, they either (1) ask the user to register directly in iLab or (2) they register on behalf of the external customer.

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**.



- Under “**Not a VUMC or VU user? (no VUNetID)**”, click **here** to signup for an iLab account.



- Complete the **Start** section.
 - Enter the external PI's email address.
 - Follow all remaining prompts.

A screenshot of the "Start" section of a registration form. The form has a white background and a dark border. At the top, there are four tabs: "Start", "Personal Information", "Group Associations", and "Billing Information". The "Start" tab is selected. Below the tabs, the text reads "You are requesting access to the Vanderbilt University Medical Center's service centers." Below this text is a red asterisk followed by the text "Please enter your institution email address". There is a text input field below this text. Below the input field is a reCAPTCHA widget with the text "I'm not a robot" and a checkbox. Below the reCAPTCHA widget is another checkbox with the text "I agree with iLab's privacy and security policies". At the bottom right of the form, there are two buttons: "Cancel" and "Continue".

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.

The screenshot shows a web form with a progress bar at the top containing four steps: Start, Personal Information (highlighted), Group Associations, and Billing Information. The main content area is titled "You are requesting access to the Vanderbilt University Medical Center's service centers." and contains the following fields:

- * First Name: A text input field.
- * Last Name: A text input field.
- Phone Number: A text input field.
- * I am affiliated with the following institution: A dropdown menu with the placeholder text "Please type the name of your institution".
- * What is your primary role at the above?: A dropdown menu with the placeholder text "Please select a role".

At the bottom right of the form are three buttons: "Cancel" (light blue), "Back" (grey), and "Continue" (dark blue).

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.

Start Personal Information **Group Associations** Billing Information

**You are requesting access to the
Vanderbilt University Medical Center's service centers.**

You have chosen to create a new institution and thus no existing groups are available. If you think your group and your institution are already registered, please return to the Personal Information step and search for your institution.

* What lab or research group are you associated with?
Create New Group...

Hint: You can also search using your PI or Manager Name

* PI's First Name
Christina

* PI's Last Name
Chow

* PI's Email Address
christina@elsafety.com

PI's Phone Number
(630) 698-0484

* Is there another person in your lab who helps manage lab memberships, fund assignments and spending approval?
No

* Your Group's Name
Chow, Christina (ELS) Lab

Cancel Back Continue

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.

Start Personal Information Group Associations **Billing Information**

**You are requesting access to the
Vanderbilt University Medical Center's service centers.**

Billing information is required for core facilities to be able to charge when necessary.

Associate new billing address to my account

Billing Contact Name
 + Institution / Department

* Billing Address
 + Address line

* City

State / Province
 + Country

* Zip / Postal Code

Add shipping address if different from billing

Cancel Back **Complete**

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.