Service or Project Request Workflow

iLab offers workflow management tools to all cores to allow customer to submit requests for new services directly in iLab. For groups utilizing these tools, they can then access the request and complete items for billing. The system also allows the cores to create custom forms for the various project requests. For more information contact the Office of Research or review the “**Service or Project Request Workflow**” guide on the Office of Research website.

Managing and Confirming Equipment Reservations

For cores that use the equipment reservation module in iLab, please see the “**Managing and Confirming Equipment Usage”**user guide. The guide is available on the Office of Research website. This guide will provide details on managing equipment settings, approving users or reservations, and confirming usage.

**IMPORTANT:** All equipment usage must be confirmed by the end of each month to capture the usage charges in the billing event.

Time Entry Billing Method

The **Time Entry** module is available for cores that utilize time sheet billing. Contact the Office of Research for more information and to have this feature activated for your iLab site. Instructions are available on the Office of Research webs

Charge Entry Billing Method

Simplified order entry can be completed using the **charge entry** module in iLab. This workflow is used for cores that use the iLab system for billing purposes only. All intake requests and workflow management are handled outside of iLab. Instructions are available on the Office of Research website.

Office of Research – iLab User Guides

All referenced user guides for core directors and staff can be found on the Office of Research website.

Additional guides for PIs, Lab Managers, Lab Members, and Department Administrators are also available.

Please visit <https://www.vumc.org/oor/ilab-user-support-users-vumc-core-groups> to access all user guides.

Creating a Billing Event

Cores **must create a billing event each month to finalize billing** for the confirmed equipment usage and/or completed service requests. This step must be completed in order to collect payment from the core users.

* We ask that billing events not be created between the 1st and 10th calendar days each month.

Please visit the Office of Research website for the instructions on creating a billing event.

Billing Numbers Notes

VUMC PIs - Internal Users:

All VUMC PIs will use the billing number payment method. Labs will need to contact their department administrators to activate new billing numbers in iLab. Once active, the user will select the payment number from a drop-down menu when requesting services or reservations.

* **Note:** Once a center number has been added to iLab by the department administrator, it will automatically be assigned to the PI only. The PI and/ or the Lab Manager will need to grant access to the center for any lab members or lab managers.

VU PIs - External Users:

VU PIs will use the PO payment method. The user or the user’s lab/department will need to complete a web form on the Office of Research website to activate new VU billing numbers. Once active, the user will select the PO number from a drop-down menu when requesting services or reservations.

* **Note:** VU PIs will use their CoA or POET numbers in iLab. These numbers are added as a ‘PO’.

Other External Users:

VA PIs or other external PIs will use the PO payment method. The core or user will enter the PO number into iLab.

* Once entered, the core or the Office of Research will need to approve the PO.
* Once approved, the PO number will be available for all future service requests or reservations from a drop-down menu for that specific core group.

External Customer Management

When working with new external customers, the following steps must be completed. Detailed instructions are available on the Office of Research website. See the “**External Customer Management”** document.

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

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

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

Invoicing Support

**VUMC & VU Invoices – Payment Status:**

Core Managers/Staff and customers should disregard the payment status of invoices to VUMC or VU billing numbers. The payment is automatically processed by the VUMC Office of Research and VUMC Finance and VU Finance each month.

**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 navigation menu.
2. A **list of invoices will appear**.
3. **Use the filter panel on the left** to reduce and sort the invoices that display.
	1. **Example:** Use the ‘**payment number’** filter and select the invoice number. Click ‘**Apply Filters**’.
	2. **Example:** Use the ‘**keyword search**’ and type in the invoice number. Click ‘**Apply Filters**’.
4. On the far right, click the **magnifying glass** to view the actual invoice.
5. To download a copy, click the **pdf** icon in the top left of the screen.