Introduction to iLab Solutions for Core Directors and Staff

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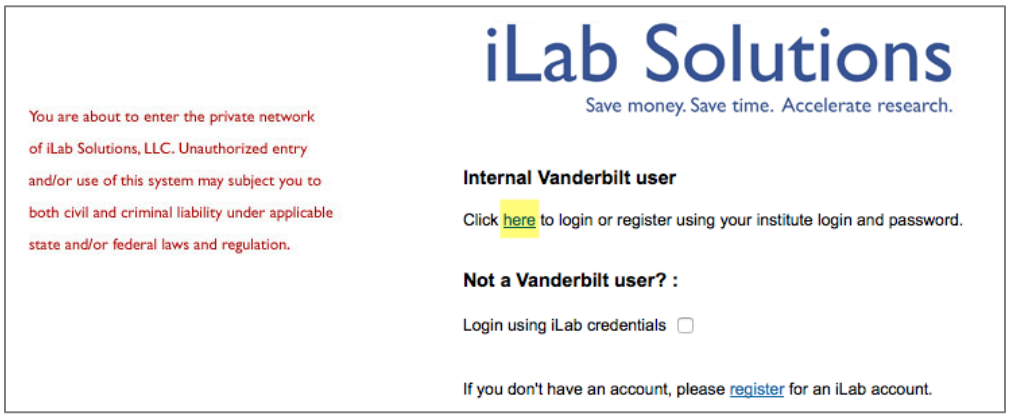
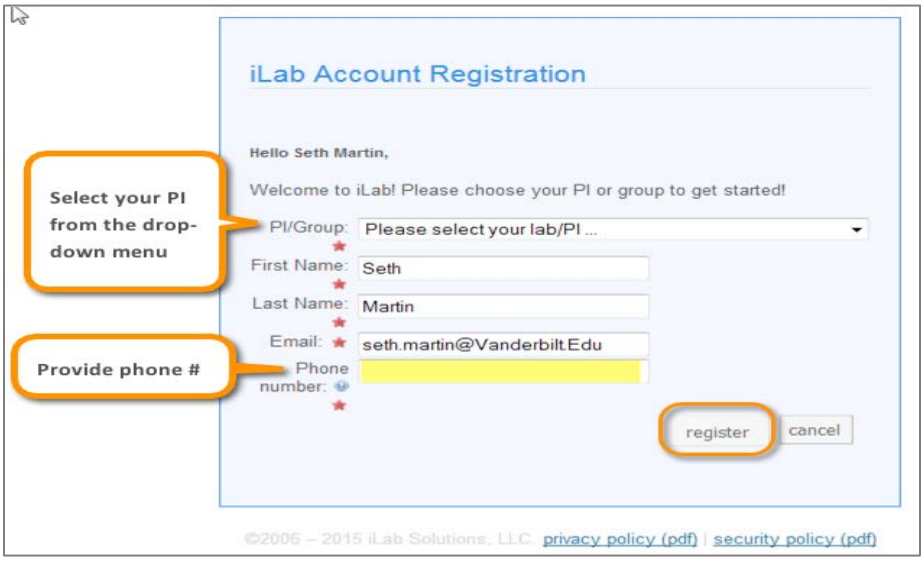
Account Access & Login Credentials

1. Click here to access the core site: https://vanderbilt.corefacilities.org
2. All Vanderbilt users will use their VUNet ID and ePassword to access the application.



Account Registration for First-time Users

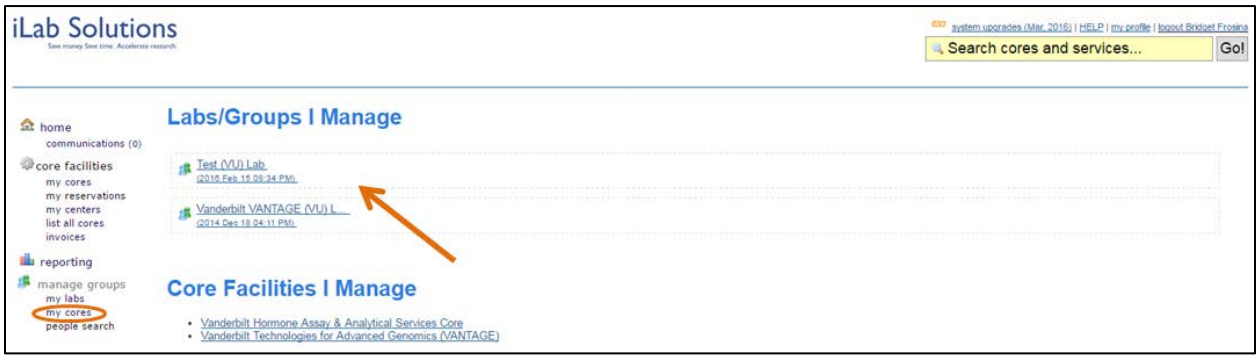
1. Click the ***register*** link at the bottom of the page.
2. A registration page will open. It will pre-fill you first name, last name and phone number. Complete any fields that have not been pre filled.
3. In the *PI/Group* drop down menu, search for your core's name and **choose your core as the** lab.
   a. If you do not see your core's name in the *PI/Group* drop down menu send an email to CoresEmail@vanderbilt.edu with your **Name** and **core's Name**.
   b. If you work with multiple core groups, please select one to initially set up the iLab account. Next, send an email to CoresEmail@vanderbilt.edu with a list of the other core group names.
   c. The Office of Research will update your iLab account and send a confirmation email.
4. Once you register, the Office of Research will approve your account Please allow 24-48 hours for processing.
5. Upon account request approval, you will be able to access and request services from Vanderbilt cores.



Accessing Vanderbilt Cores

After you have registered and your account is approved, you can access Vanderbilt's iLab Solutions site.

1. Log into iLab here: https://vanderbilt.corefacilities.org
   a. All users will use their VUNet ID and ePassword to access the application.
2. After you login to iLab, click on ***my cores*** in the left navigation panel to access a list of your core facility memberships.
   a. Click on the core name you want to access.
   b. The core's home page displays.



Center 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.

External Users:

VU PIs, VA PIs or other external PIs will use the PO payment method. The user will enter the PO number in the payment information field when requesting services or reservations. 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.

- **Note:** PO Numbers are entered per PI per core group.
- **Note:** VU PIs will need to enter the VU Cost Center into the PO field.

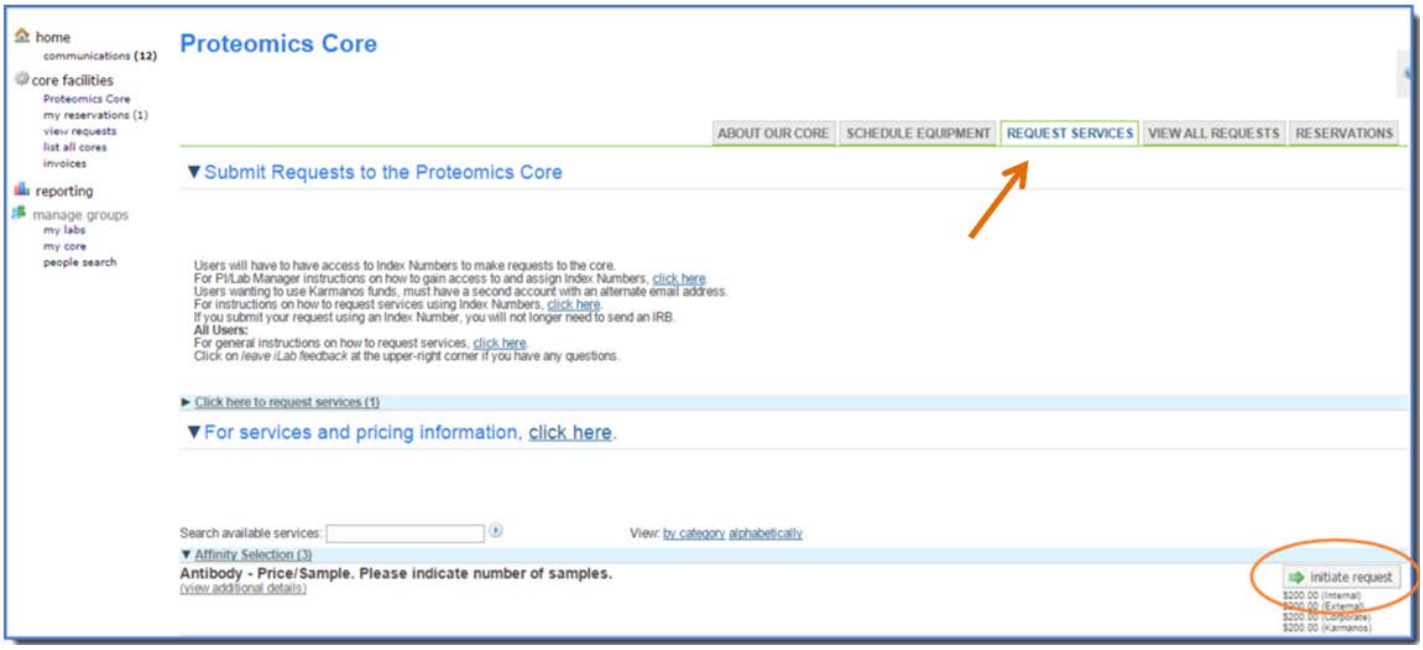
Requesting a Service on behalf of a user

Core personnel can request services on behalf of a user.

1. Access your core's site.

2. Click on the ***Request Services*** tab.
   a. On the Request Services page, there will be a list of available services.

3. Click on the ***Initiate Request*** button to the right of the service you would like to request.

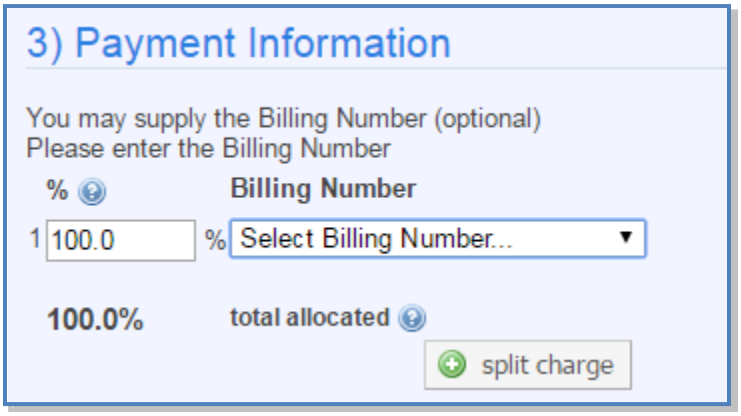


4. Select the user by entering the name of the person for which you wish to make the request and click the ***Proceed*** button.
   a. Note: Make sure you are searching within "this institution" or "all" if you are looking for a user that has not yet used the core.

5. Complete the submission ***form***.
   a. Be sure to complete all required fields marked by a red star.

6. If known, in the ***payment information*** section, select the correct center number from the ***drop down menu***.
   a. If you do not know the payment number, do not select a billing number from the drop down menu. The core user will be able to update the request with the correct billing information.

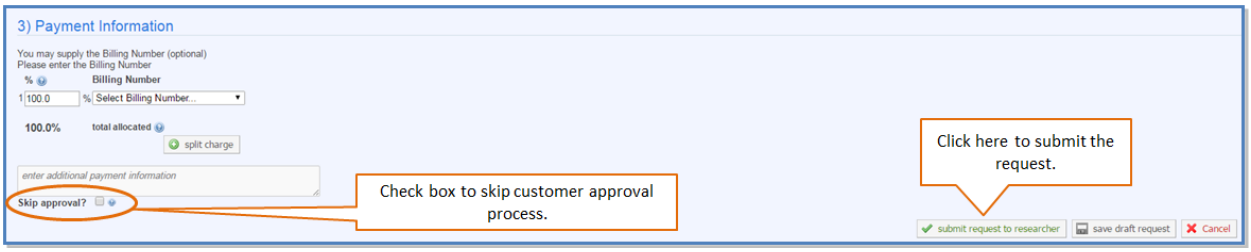
   b. Split Charge: The cost of service requests can be allocated across center numbers.
      i. To allocate across multiple center number, click ***split charge***.
      ii. Select the additional center number from the drop down menu.
      iii. Enter the % allocations to split the cost across the center numbers.



   c. <u>Center Number Notes:</u>
      i. Lab members will need to be granted access to activated center numbers by the PI and/or the Lab Manager.
      ii. PI or Lab Managers will need to contact the department administrators to activate new center numbers in iLab.

7. You may wish to route the request to the researcher for approval.
   a. If so, click the ***submit request to researcher*** button at the bottom of the page to submit the request.
      i. Once the request is submitted, the ***View All Requests*** tab will open to display the new request.
      ii. The status of the request will typically be ***Waiting for Researcher Approval*** indicating that the request owner needs to review the request to approve the proposed work and projected cost.

8. If you wish to skip the approval process, check the ***Skip approval?*** option. Then click, ***submit request to researcher*** button to submit.
   a. Once the request is submitted, the ***View All Requests*** tab will open to display the new request.
   b. The status of the request will typically be ***Waiting for Core to Begin*.**



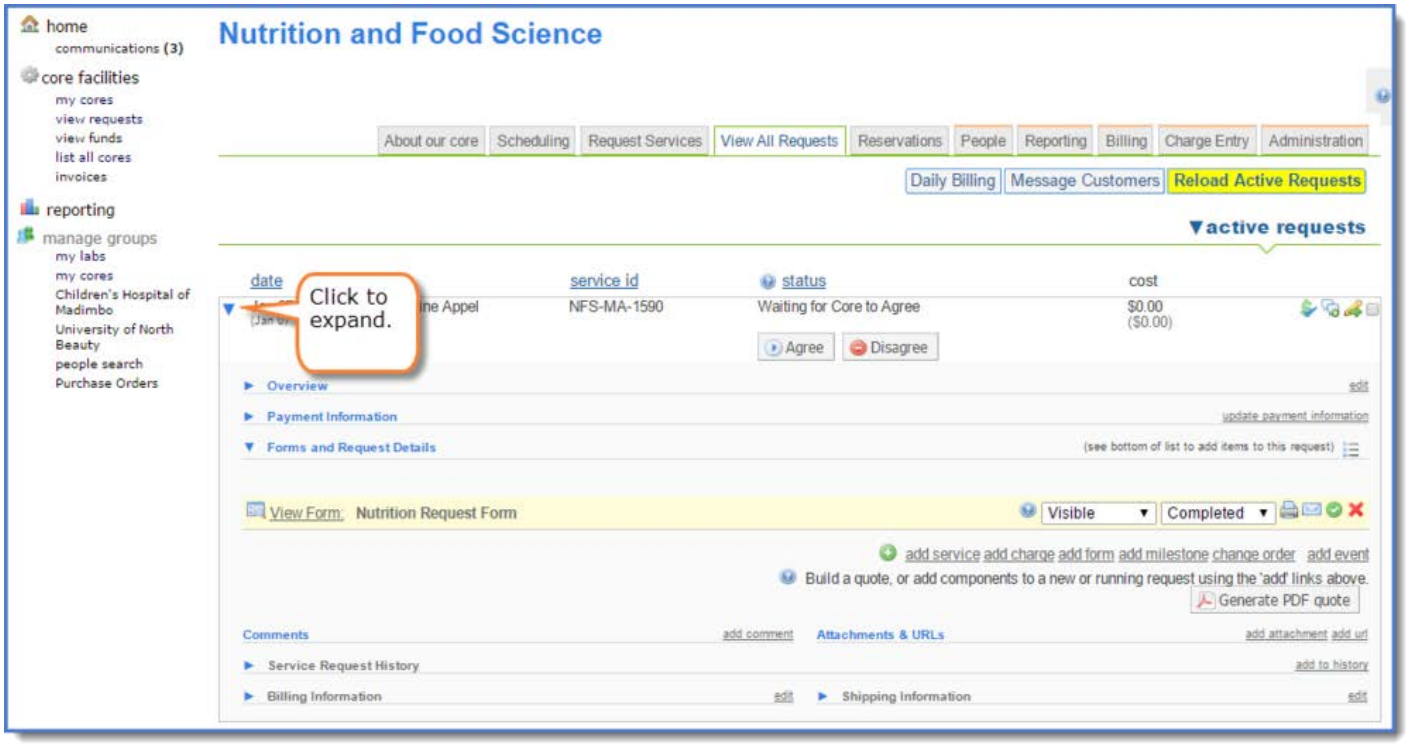
Processing Service Requests

The core can view all new and active services requests on the ***View all Requests*** tab. The core should check this section iLab to approve and process any new service requests.

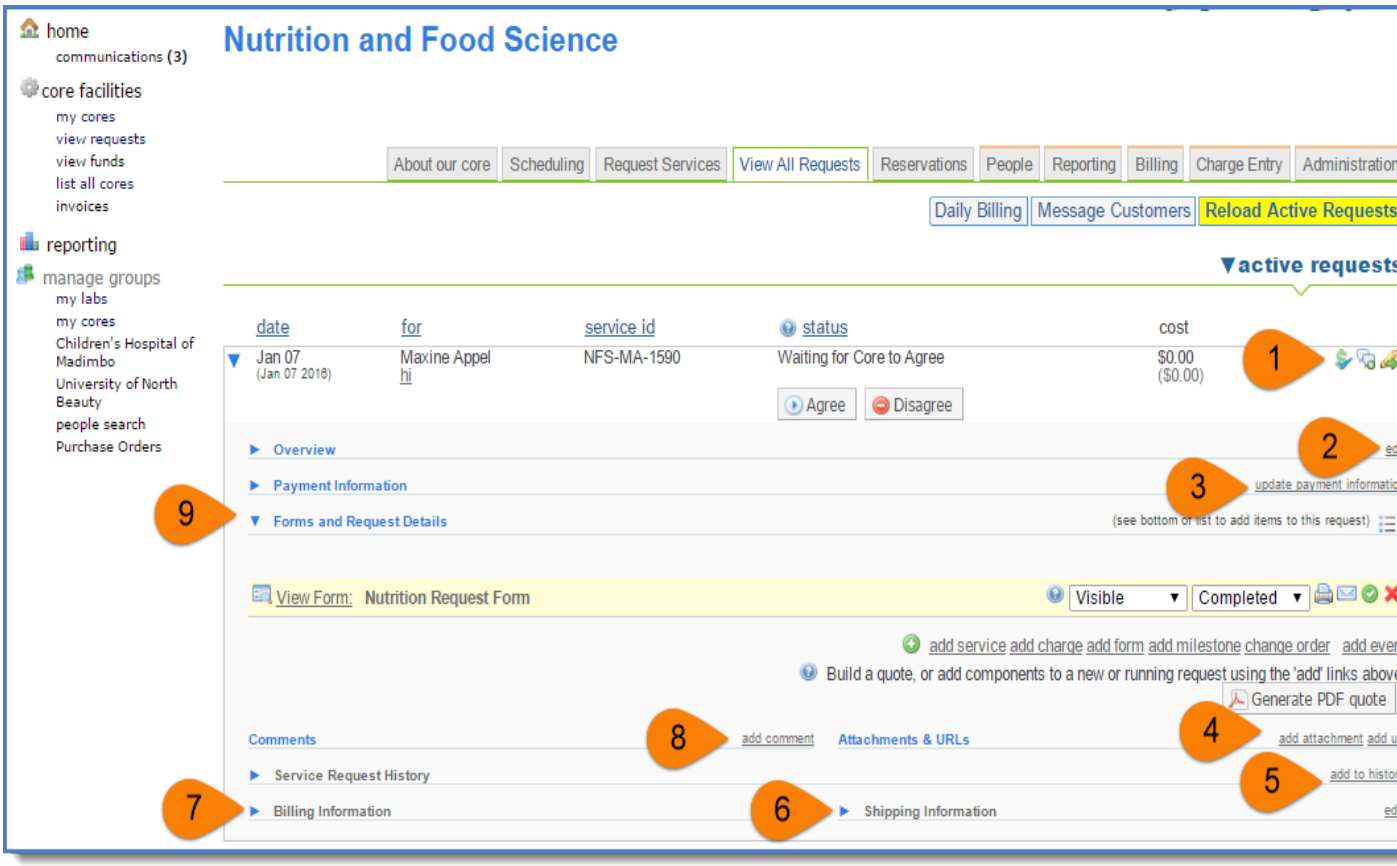
<u>To review new requests:</u>

1. All new service requests will be in the ***Waiting for Core to Agree*** status.

2. Click the ***blue arrow*** to expand the service request.



3. The details of the request are displayed. The following areas may be updated.



a. **Item 1: Action icons.** These buttons allow you to update payment information (dollar sign icon), add a comment (text box icon), or print or cancel the request (pencil icon).

b. **Item 2: Edit Overview** information, such as Project Description, Status, and Projected Cost.

c. **Item 3: Update payment information** (functions same as the dollar sign icon).

d. **Item 4: Add an attachment** or url.

e. **Item 5: Add a note** to the history section.

f. **Item 6:** Edit **Shipping Information.**

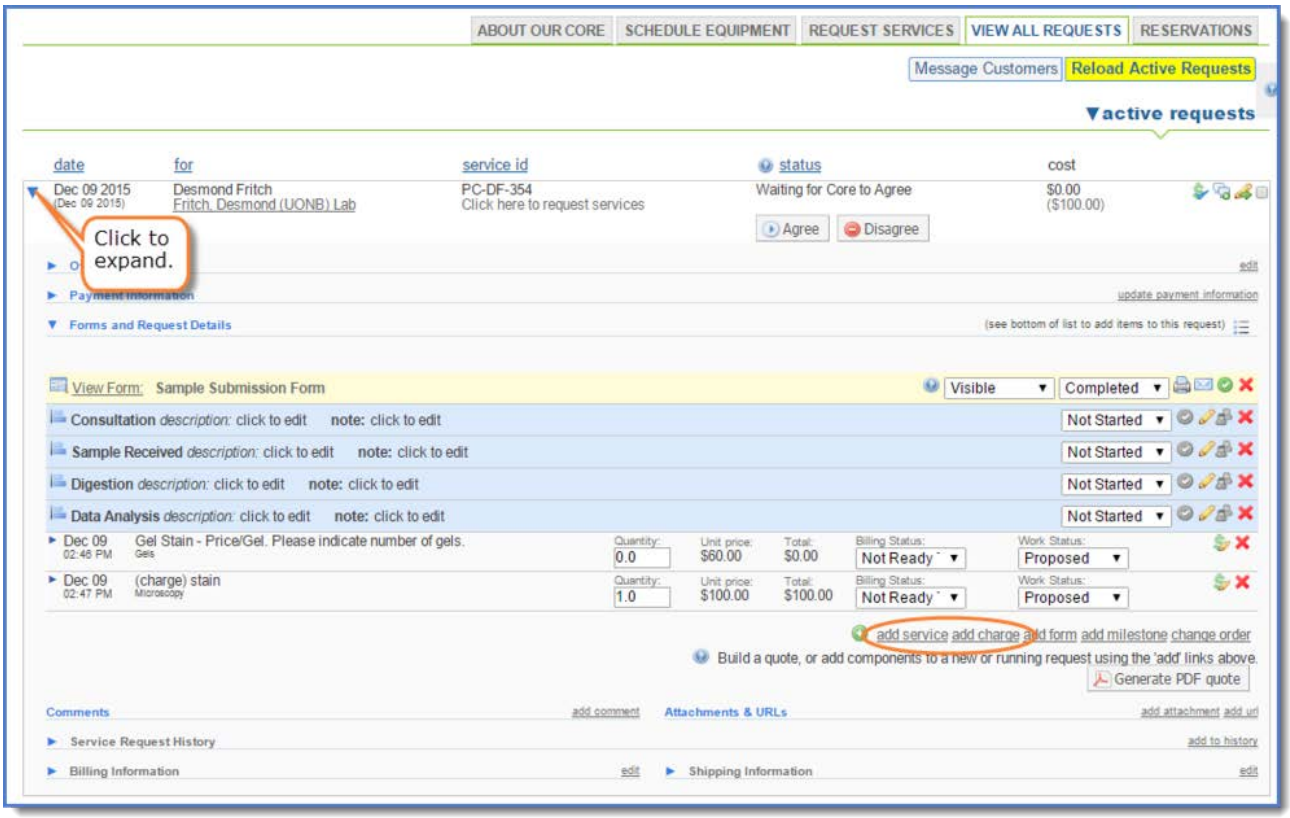
g. **Item 7:** Edit **Billing Information.**

h. **Item 8: Add a comment.** An email will be sent to notify designees copying the comment.

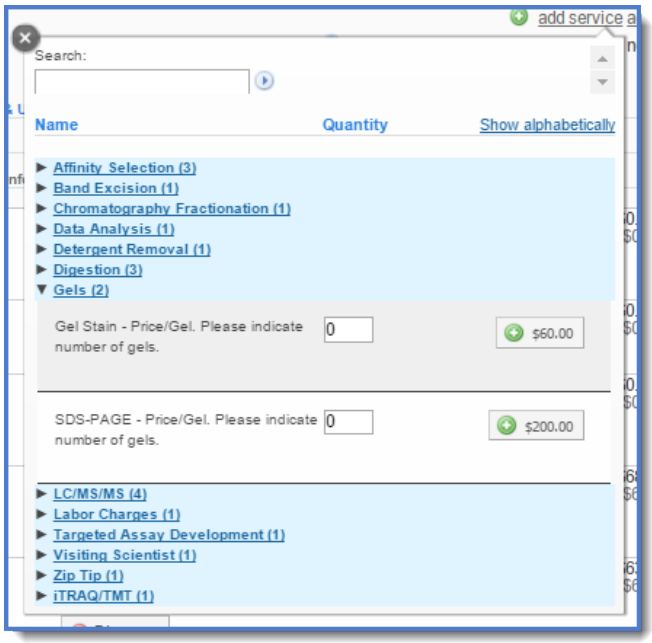
i. **Item 9:** Add/delete a **form and view request details.**

To agree to request and provide a customer quote:

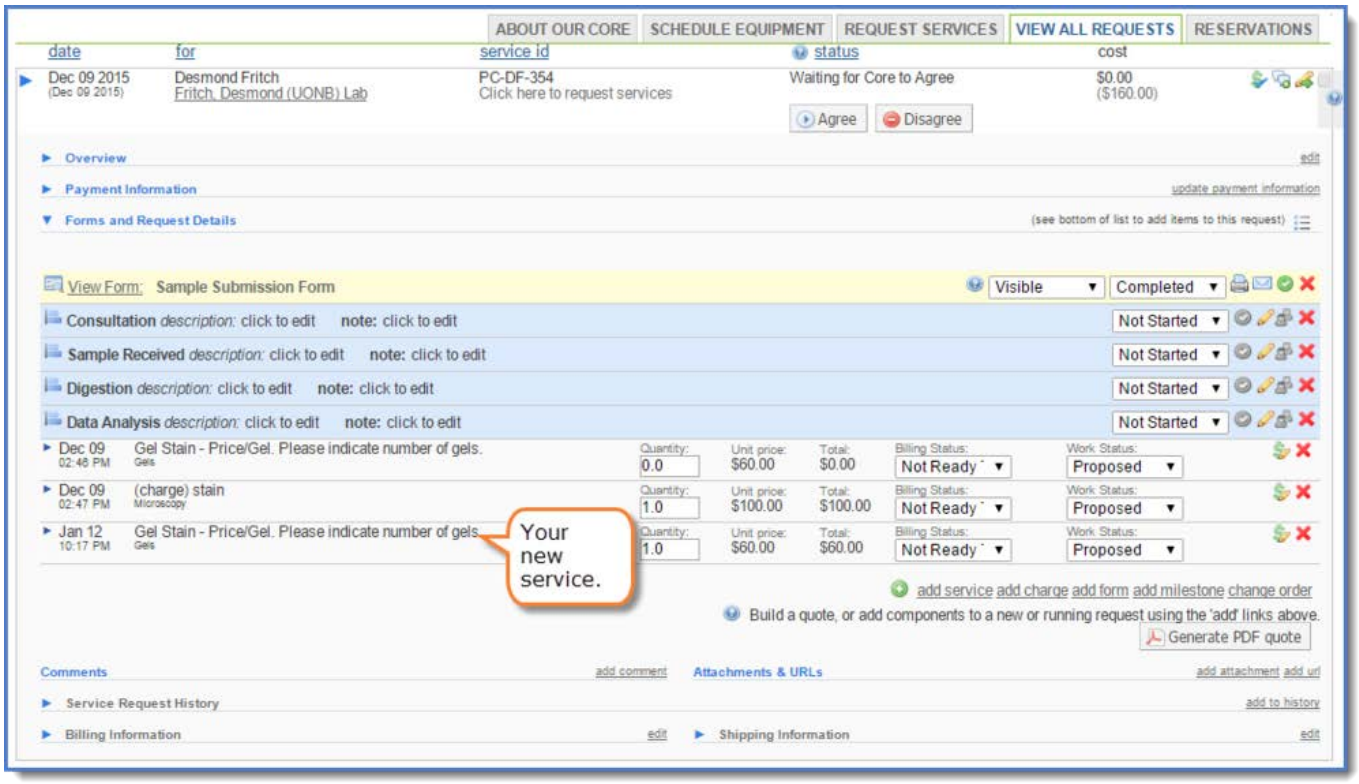
1. Click ***add service*** *to* add services from the core's service list to build the quote and calculate the project's projected cost.



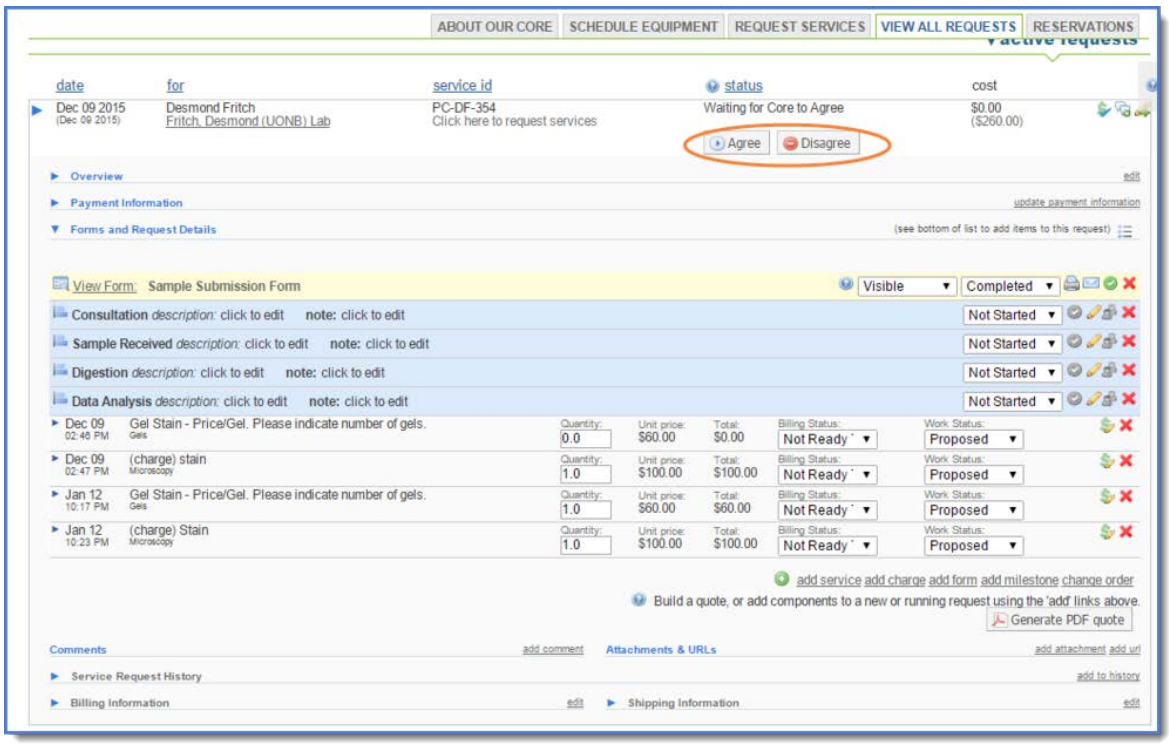
2. If there are multiple services available, you may choose to scroll down the list to locate the service of interest. Alternatively, you may start typing the service name in the search field to view a restrict set of services.



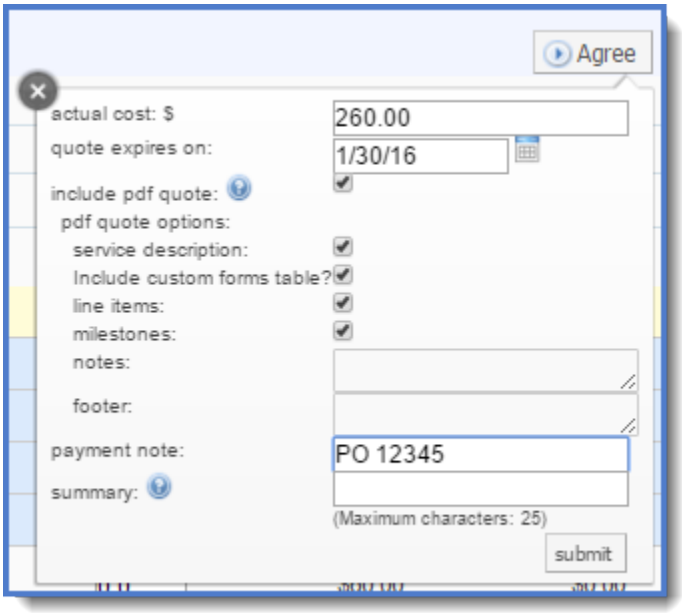
3. ***Enter the unit quantity*** and then click the ***green plus button*** to add the service.
   a. The service line item is added.



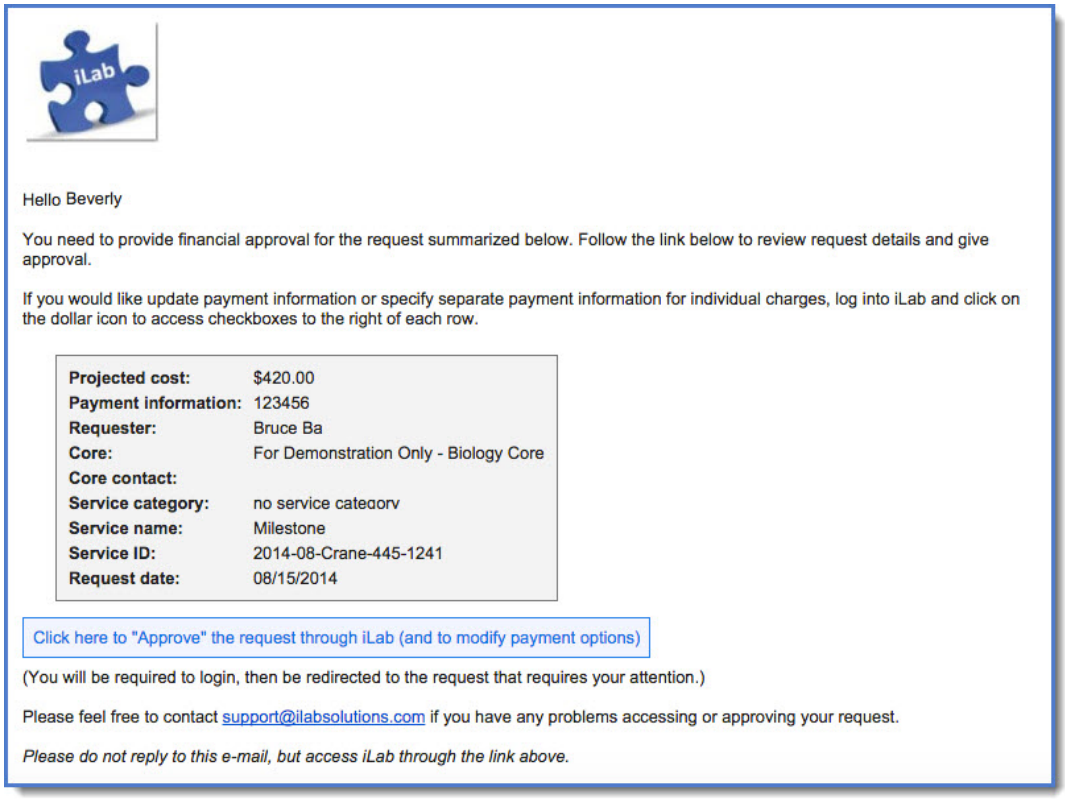
4. Agree to the service request by clicking the ***agree*** button.



5. **Create the quote.** Review the project cost, enter in the quote expiration date if applicable and indicate which items on the request you want included on the PDF quote.
    a. Check the box next to ***include pdf quote***.
    b. Click on ***submit*** to send the PDF quote and link to the request in iLab in an email to the request owner.



6. When you click ***submit*** on the quote, an email will be generated and sent to the email addresses designated with a summary of the project and a quote included.



Hello Beverly

You need to provide financial approval for the request summarized below. Follow the link below to review request details and give approval.

If you would like update payment information or specify separate payment information for individual charges, log into iLab and click on the dollar icon to access checkboxes to the right of each row.

Projected cost:	$420.00
Payment information:	123456
Requester:	Bruce Ba
Core:	For Demonstration Only - Biology Core
Core contact:	
Service category:	no service category
Service name:	Milestone
Service ID:	2014-08-Crane-445-1241
Request date:	08/15/2014

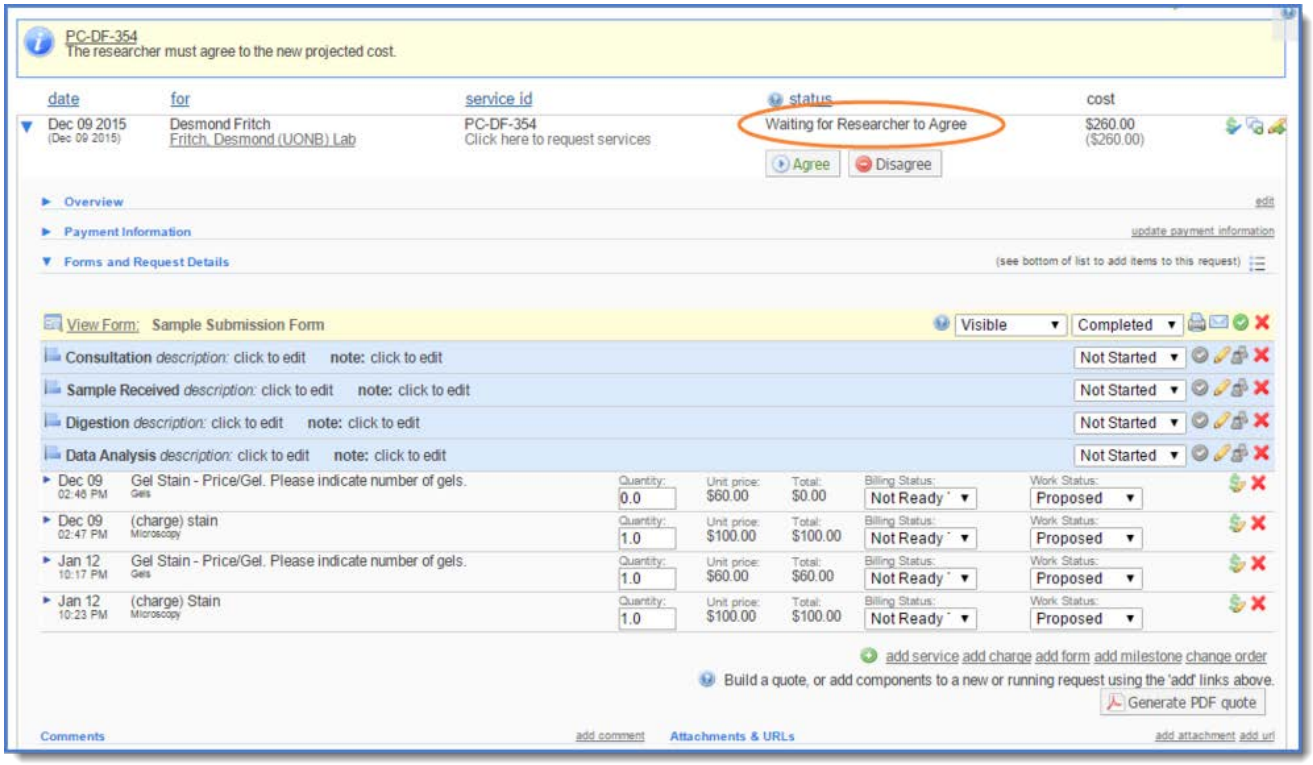
Click here to "Approve" the request through iLab (and to modify payment options)

(You will be required to login, then be redirected to the request that requires your attention.)

Please feel free to contact support@ilabsolutions.com if you have any problems accessing or approving your request.

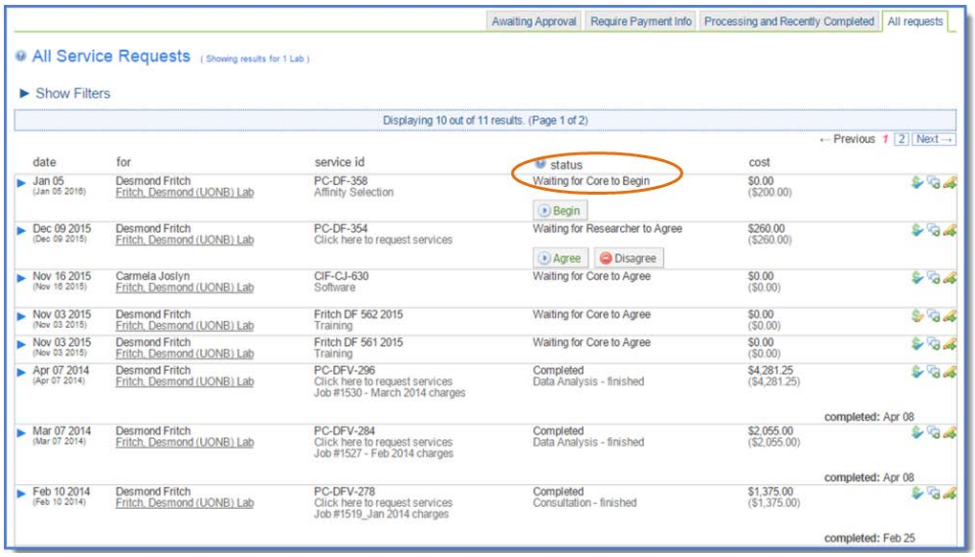
Please do not reply to this e-mail, but access iLab through the link above.

7. The new information displays in the request and the request status is now ***Waiting for Researcher to Agree***.
    a. **IMPORTANT:** The request will need to be approved by the customer before the core begins work.

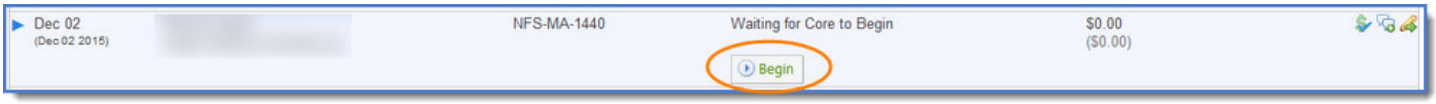


To indicate that work has started on a request:

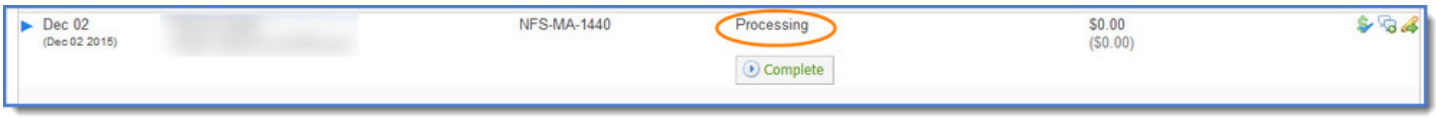
1. If the user and core have agreed to the work, and the Financial Approver has approved the projected cost and payment, work may begin on the request. The status of the request will be ***Waiting for Core to Begin***.



2. Find the appropriate service request on the ***View All Requests*** tab. Click the ***Begin*** button.



3. The process will update to ***processing.***

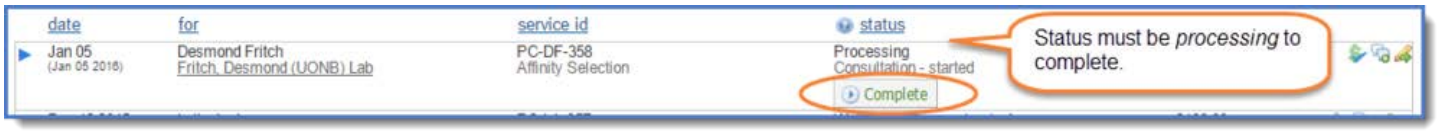


4. Once the status is processing, core staff can add services, comments, milestones, attachments, and other items as they work on the project.
   a. For details on advanced features of iLab, please visit http://help.ilabsolutions.com/managing-service-and-project-requests.

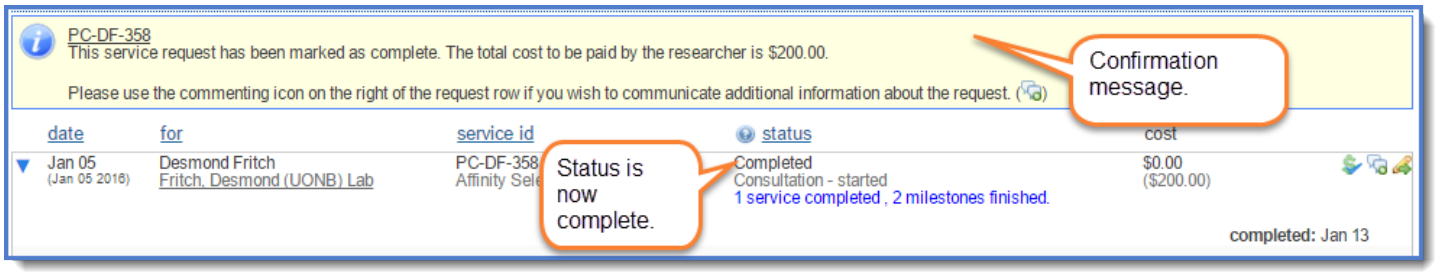
To mark a request as complete:

1. Once the work has been finished and the core is ready to bill, locate your service request on the ***View all Requests*** tab.

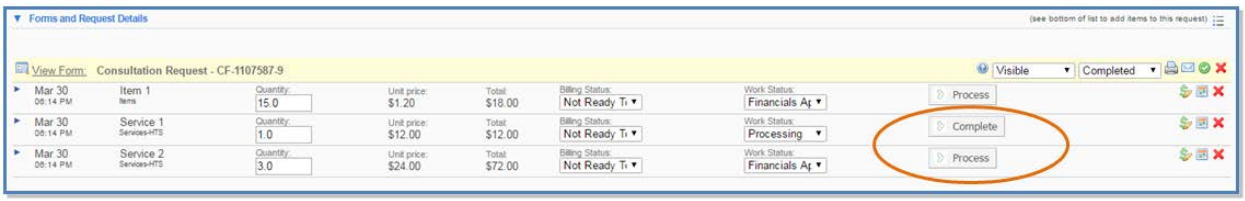
2. Click on the green ***complete*** button.



3. A confirmation message displays, and the status of the request is updated.



4. When a request is marked ***Complete*** all service items and milestones that have not been updated ill update to ***Completed*** or ***Finished***. Unless otherwise designated on the line item, the completed services will then then be available for billing.
    a. Note, if you wish to leave the service project open, but bill for specific service items. Click ***Process*** and then ***Complete*** on the individual service line.

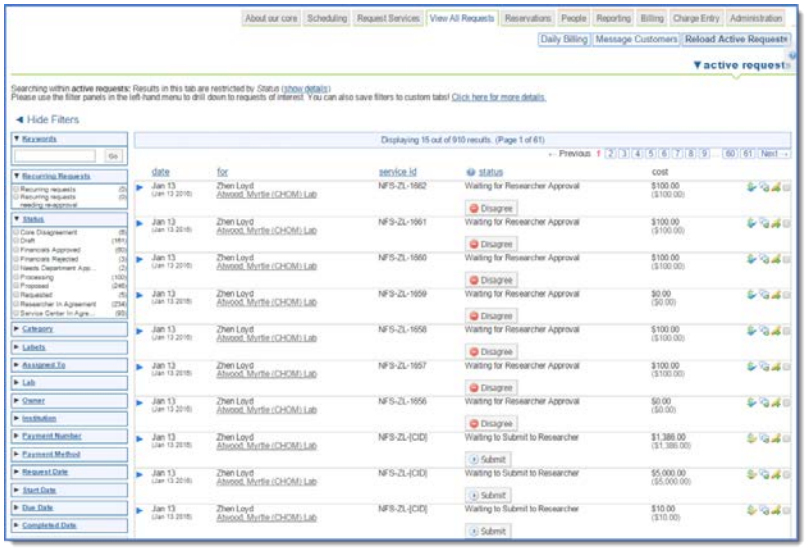


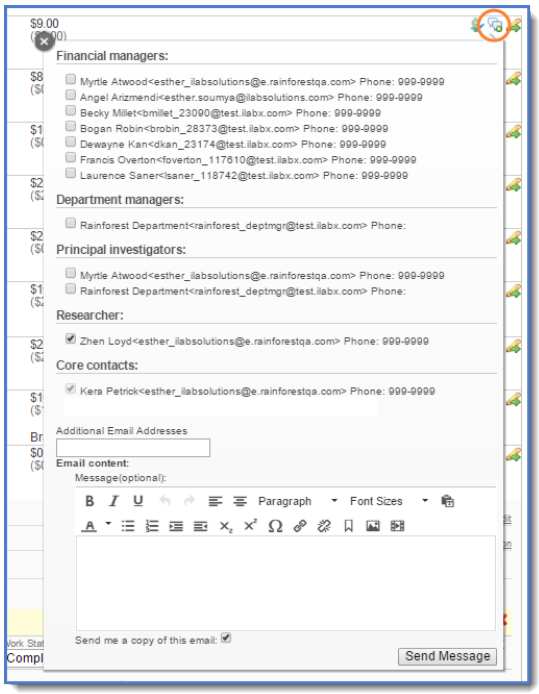
5. All requests with a ***Completed*** status will be removed from your active requests list but can be searched for using filter options at the upper right of the request list table.
    a. Click ***active requests*** to display these filter options.

Communicating with Customers

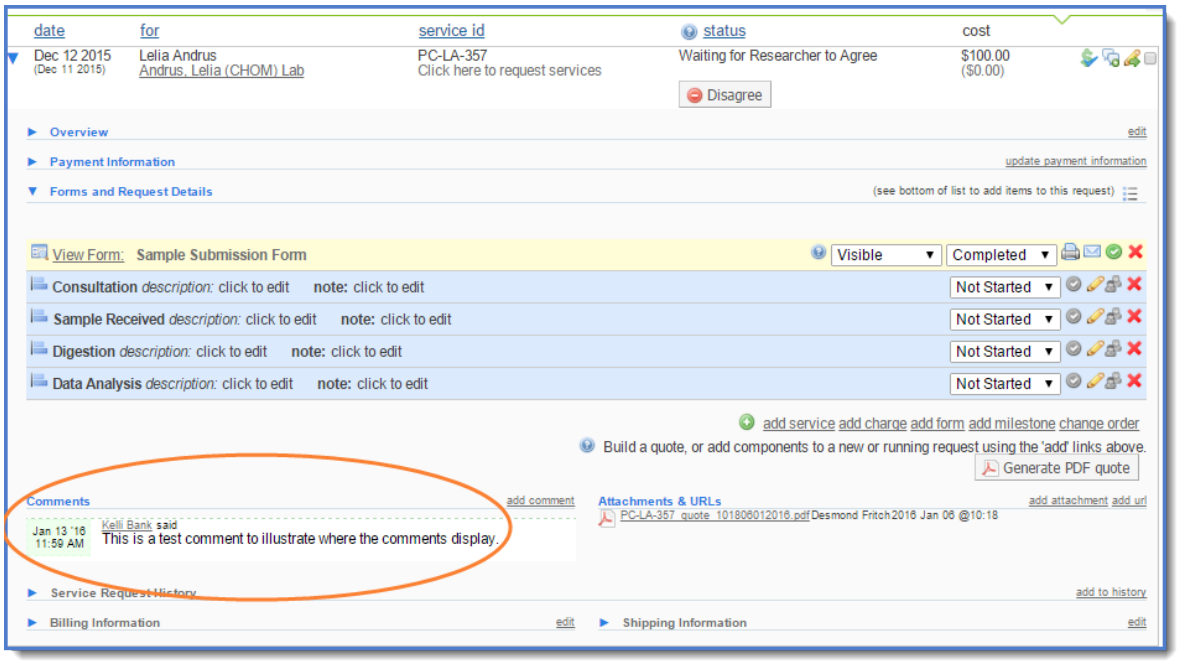
Cores can communicate directly with users within iLab. This feature allows all messages to be saved directly on the service requests and can be viewed at any time by the customer and the core.

1. The core can view and access all active requests on the ***View All Requests*** tab.
2. Click on the ***comment icon*** to the right of the request to use the communication tool.
   a. The email interface window will be displayed.





3. Complete the information and click ***send message***.
   a. After you click on ***Send Message***, the selected recipients will receive the email. An audit trail of the email exchange through iLab can be seen under comments on the request.



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 located at *https://medschool.vanderbilt.edu/oor/vanderbilt-cores-ilab-solutions-transition*

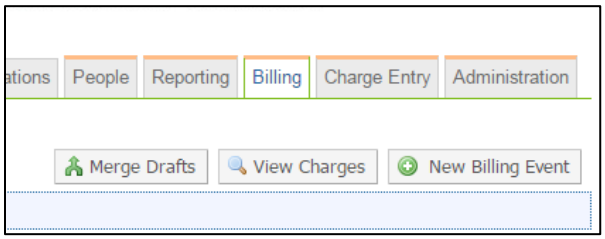
This guide will provide details on managing equipment settings, approving users or reservations, and confirming usage.

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

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.

Please visit the Office of Research website for the instructions on creating a billing event. The Billing Event user guide is available *https://medschool.vanderbilt.edu/oor/vanderbilt-cores-ilab-solutions-transition* .



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://medschool.vanderbilt.edu/oor/vanderbilt-cores-ilab-solutions-transition* to access all user guides.

iLab Core Customer Help Articles

For more detailed instructions on ordering services or scheduling equipment please visit the iLab Solutions helpsite: http://help.ilabsolutions.com/core-facilities-customers.