User Guide:
Introduction to iLab Solutions
For users of VUMC funds to purchase VUMC Core Services
(VUMC PIs, Lab Managers, and Lab Members)

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Accessing VUMC Cores

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

- The system will prompt first-time users to register.
- Registration instructions are available on the Office of Research website.

After you have registered and your account is approved, you can access VUMC Cores in iLab by completing the following:

1. Log into iLab here: https://vumc.corefacilities.org

2. Click the here link under the header Internal Vanderbilt user.

3. All users will use their VUNet ID and ePassword to access the application.

4. Click on the list of all cores link on the left side of the iLab page.

5. Select the core from which you want to order services.
Updating Personal Profile in iLab

Users can update their contact information by editing their personal profile in iLab.

1. Select **My Profile**

![My Profile Image]

2. Select **Edit**

![Edit Image]

3. Make the update and then select **Update Person Profile** to complete and save the changes.

![Update Person Profile Image]
Adding Center Numbers

VUMC Labs will need to contact their department administrators to activate new VUMC center numbers in iLab.

- Refer to the Introduction to iLab Solutions for VUMC Department Administrators user guide.
- This guide is available on the Office of Research webpage located here https://medschool.vanderbilt.edu/oor/vanderbilt-cores-ilab-solutions-transition.

Access to Center Numbers for Lab Members

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.

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 center 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 center number.
5. The system will automatically save your changes.

All new changes will be highlighted green.
Lab Roles

PI
- Automatically granted access to VUMC cost center once activated by the department administrator
- Automatically granted access to voucher funds once activated via StarBRITE feed.
- Can grant self access to scholarship funds once activated by the scholarship center’s administrator.
- Can grant other lab members access to VUMC cost centers, voucher funds, and scholarship funds.
- 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).

Lab Manager
- Can grant self access to VUMC cost center once activated by the department administrator
- Can grant self access to voucher funds once activated via StarBRITE feed.
- Can grant self access to scholarship funds once activated by the scholarship center’s administrator.
- Can grant other lab members access to VUMC cost centers, voucher funds, and scholarship funds.
- 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 fund is activated and access is granted to specific fund).

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.
- Individual will financial contact access will be able to access invoices and reporting activity across all fund sources assigned to the lab.
- The first financial contact in the lab will receive iLab email notifications (Invoice notification, financial approval needed, scholarship fund activated, etc.).
Auto-Approval Thresholds

iLab allows PIs to set a threshold on the total allowable amount a lab member is allowed to order through iLab on a per order basis without PI approval.

- Any orders requested below this threshold can be processed by the core without PI approval of the request in iLab.

Vanderbilt Institutional Limits

VU set the default “auto-approval threshold” for all labs at $1,000.

- Any orders requested above this threshold amount will require approval from the PI or the PI’s Financial Contact.
- The threshold amount can be changed on a lab-by-lab basis.

To edit the lab’s auto-approval threshold:

1. The PI or the PI’s financial contact can change the amount on the lab’s iLab page.
2. Click “My Labs” in the left-hand menu of the home page.
3. Click the name of the Lab.
4. Click the members tab.
5. Update the amount in the “Auto-approval threshold” filed.
6. Click Save approval settings.

NOTE: Optionally, this threshold can be set at different levels on a member-by-member basis.

1. Click the yellow pencil next to the name of the lab member.
2. Update the amount in the “Auto-approval amount” column.
3. Click Save.
Navigating iLab
The left hand navigation panel will be used for all iLab functionality.

1: View Requests:
   - Click ‘View Requests’ to see any request from any resource user from any lab or department that you manage.
   - Use this to view and approve requests that are pending PI approval.

2: Invoices:
   - Click ‘Invoices’ to see a list of invoices created by a core for any center number within your department.
   - You may view an invoice from your invoice list and make changes to your invoice. (See Invoices section for details on editing an invoice)

3: My Labs:
   - Click ‘my labs’ to see a list of the labs in which you manage.
     - Tip: you may also hover over ‘My Labs to see a bubble of your labs.
   - Pending lab access request:
     - Lab access requests appear when a new lab member has registered their iLab account. They must be accepted into a lab and assigned Center’s before using the core facilities.
     - Click the link to approve the member and assign funds.
Requesting a Service

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.
   a. On the Request Services page, there will be a list of available services.

   ![Assisted Equipment Use & Training Requests](image)

2. Click on the Request Service button to the right of the service you would like to request.
   a. A submission form will open.

   ![Training Request: Confocal and Widefield Microscopy, Image Analysis](image)

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

   ![1) Forms and Request Details](image)
4. In the **payment information** section, select the correct center number from the drop down menu.

   a. If the center number is not available, contact your lab manager.
      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.

   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.
5. Click the **submit request to core** button at the bottom of the page to submit your request.

![Submit Request Button](image)

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.

![View My Request Tab](image)

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 Service 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.

3. If all information is correct, you may approve the service request by clicking approve.
4. Once you approve the request, a pop-up window will display. If needed, you can update the payment number and click **Submit**.

5. 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.

**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.
Requesting 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.
   a. 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.
5. In the **payment information** section, select the correct center number from the **drop down menu**.

   a. If the center number is not available, contact your **lab manager**.
      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**.

   ![Image of payment 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.

   ![Image of payment information with split charge]

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

   ![Image of Save Reservation button]

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 or **support@ilabsolutions.com** if you have any questions.
Equipment Reservation Notes

**Trained Users:**
In some cases, cores require only allow trained (or approved) users to schedule time on specific instruments.

em *If you have access to the calendar, you will be able to select view schedule and make a reservation.
em *If you do not have access, you will need to select “Request Training” to request approval from the core to use the instrument.

**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 purple.
Reviewing Invoices

From the left 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.

1. Click on Invoices in the left hand menu.

2. A list of invoices will appear.

3. 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’

4. On the far right, click the magnifying glass to view the actual invoice.
Editing the Pre-Invoice: Billing Number Corrections/Distribution

Change the billing number on the Pre-Invoice: Once an invoice has been created by a core, a PI will have the opportunity to review the invoice and make corrections if necessary.

1. Click on Invoices and click the magnifying glass to view the invoice.

2. Pre-Invoice indicates the invoice is in a period where updates and changes are allowed.

3. Invoices will be updated to Final Invoice once the billing has been finalized and uploaded by the VUMC Office of Research.

4. Click the $ Icon to see the billing number (VUMC center number) that will be charged.

5. To update the charges to a different billing number (VUMC center number), select the check box for each charge in the payment list.

6. Using the Billing number drop-down menu, select a new billing number.

7. Click Save.
Splitting Charges on the Pre-Invoice: Once an invoice has been created by a core, a PI will have the opportunity to review the invoice and make corrections if necessary.

1. Click on Invoices and click the magnifying glass to view the invoice.

2. Pre-Invoice indicates the invoice is in a period where updates and changes are allowed.

3. Invoices will be updated to Final Invoice once the billing has been finalized and uploaded by the VUMC Office of Research.

4. Review the charges within the invoice.

5. Click the $ Icon to see the billing number (VUMC center number) that will be charged.

6. To split the invoice between billing numbers (VUMC center numbers), select the check box for each charge in the payment list.

7. In the payment information section, click Add Split.

8. Change the percentage field to the percent to allocate for each PO number.

9. Click Save.
**Reporting**

The reporting functionality within iLab will allow users to generate reports to see amount spent across center numbers, PIs and cores.

1. Click on the **Reporting** label in the left menu to navigate to the reporting module.

2. Select **Load Default** to load the iLab default report settings (recommended).

3. 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.

4. Click **Run Report**
   a. This will generate a high level report that will include charges across billing numbers, PIs and cores.
To refine the report and specify the data down to a certain PI, billing number (VUMC center 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.
To review the expense activity, download the data or export the reports to excel.

1. Click **Export**
2. Select **Source data as CSV/XLS**.

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](image)

   - **TIP:** Click the red x to remove all the pre-populated charts.

2. **Click Add a new chart or table.**

   ![Add a new chart or table](image)
3. 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.

4. 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 center number.
How can reports be saved so that the same report be generated again?

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.

5. Enter a name for the report. Click Save.
To run a saved report:

1. Click **Load saved**

2. Select the saved report.

3. Click **Load**

To update the dates for the report and click **Run report!**