iLab

iLab Core User Guide

System Role: Core User
VUMC Office of Research

Guide Contents

Registering For iLab

Instructions for VUMC PIs, Lab Managers, and Lab Members

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

Once registered, All Vanderbilt University Medical Center (VUMC) users will use their VUNet ID and ePassword to access the application.

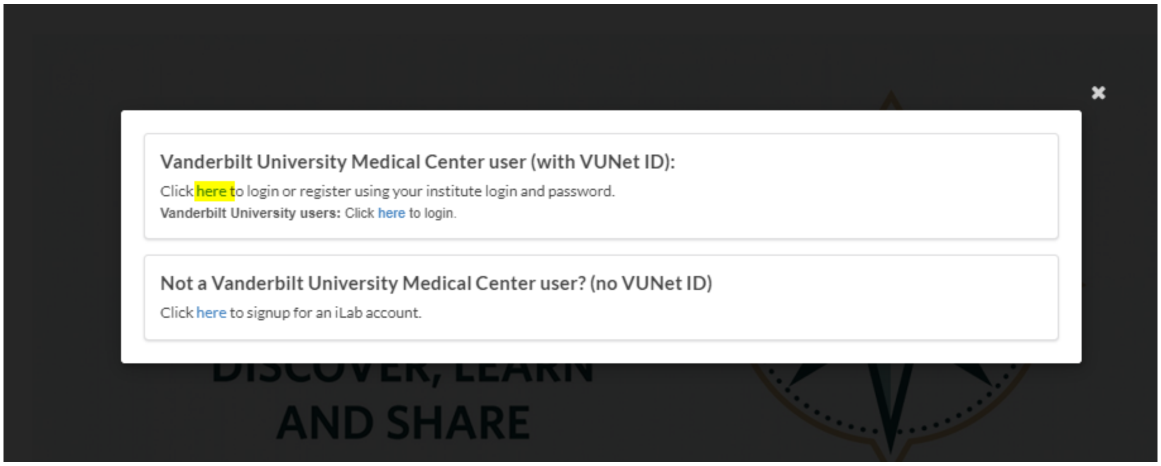
Account registration for First-time Users

If you've not logged into iLab before, you'll need to register. To register, complete the following steps:

1. Go to the iLab application here: https://vumc.corefacilities.org
   a. All users will use their VUNet ID and ePassword to access the application.

2. Click the ***sign-up*** button in the top right corner of the screen.

3. Click the ***here*** link in the pop-up window under the ***Vanderbilt University Medical Center user (with VUNet ID)*** header.



4. A VUNet ID login screen will display.
   a. Enter your **VUNet ID** and **ePassword**.

5. A **registration page** will open.

6. It will **pre-fill** your **first name**, **last name**, and **phone number**.
    a. Complete any fields that have not been pre-filled
    b. NOTE: Only use your VUMC work email address for your email in the system.

7. In the PI group drop down menu, **select the appropriate lab group.**

<table>
<tr><td>VUMC Research Staff (PI, Lab Manager, Lab Member)</td><td>• Select your PI's lab group.
• If your PI's lab group is not listed or you are a new PI, select the AAA (Default) VUMC Lab</td></tr>
<tr><td>VUMC Department Administrators:</td><td>• Select the Admin (VUMC) Lab.
• The Office of Research will contact you to complete your account registration.</td></tr>
<tr><td>VUMC Core Managers & Staff:</td><td>• Select your core director's Lab Group.</td></tr>
<tr><td>VU Students:</td><td>• All VU Students are assigned to VU as their home institution. Use the VU URL to access iLab.
• Select the AAA (VU) Lab to register.
• Contact VUMCcores@vumc.org with the name of your PI.
    ○ The Office of Research will contact you to complete your account registration.</td></tr>
<tr><td>If you are unsure what lab group, you need or you do not see your PI's Lab Group:</td><td>• Select the AAA Default (VUMC) Lab.
• The Office of Research will contact you to complete your account registration.</td></tr>
<tr><td colspan="2">If you work with multiple investigators, select one Lab Group to initially set up your account. Then contact <u>VUMCcores@vumc.org</u> with a list of other PI names. The Office of Research will update your iLab account and grant you access to the other PI Lab Groups.</td></tr>
</table>

8. The Office of Research will update your iLab account and send a confirmation.

9. Click ***register***.

10. **Once you register**, the a message box will display stating your account activation is pending.

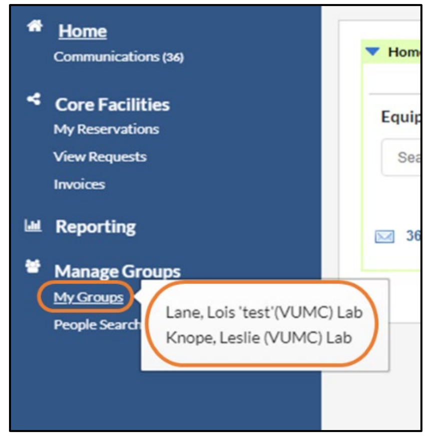
11. Your account **will need to be approved**.
    a. The Office of Research will approve requests within **<u>24-48 business hours</u>**.

12. **Upon account request approval**, you will be able to access and request services from VUMC cores and review invoices.

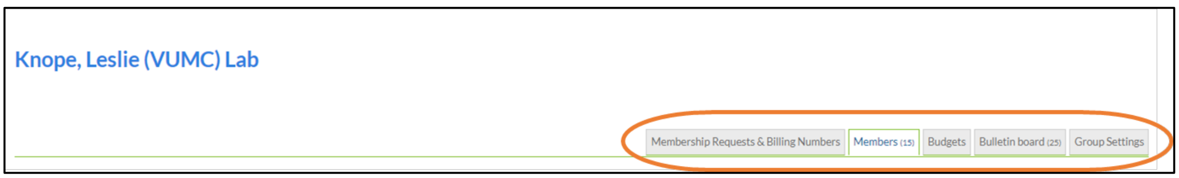
Lab Group Management

Accessing & Navigating your Lab Group(s)

To access your group, hover over the "my groups" link on the left-side navigation panel.



Navigating Within a Lab Group



Depending on your access in iLab, there are 5 function tabs within a lab group. The 2 that are utilized are:

- ***Membership Requests & Fund Numbers:*** Here you can, accept/reject group membership request and manage assignment of funding to group members.
    - NOTE: Only PIs and Lab Managers will be able to access this function tab.
- ***Members:*** Here you can manage group members.

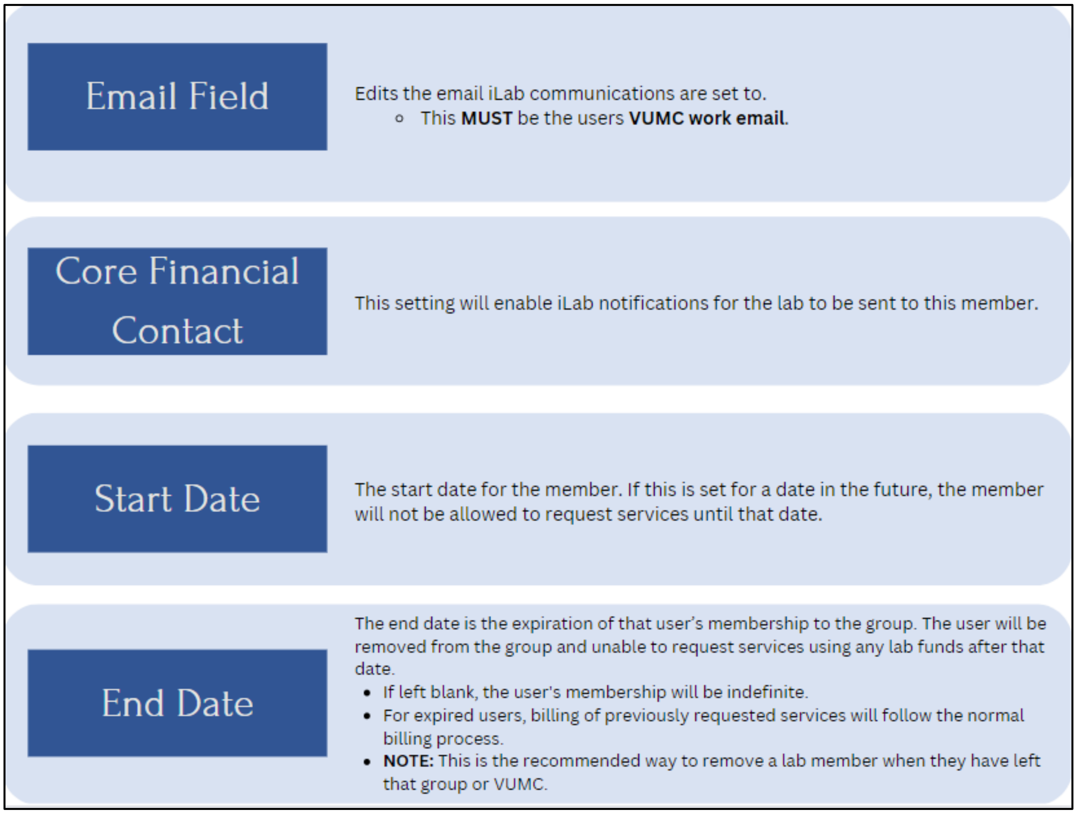
<u>**On the members tab: lab managers and PIs will be able to add, remove, and manage memberships for the group.**</u>

Icon Key

Icon	Icon Name	Description
	Role (Person)	Hover over the person icon to display the role of the associated user. When blue, the icon is identifying PIs and lab members. The orange person icon is identifying a lab manager.
	Financial Contact	This icon indicates that the user is listed as a financial contact and will receive e-mail notifications that requires attention. The PI or any manager can approve pending requests. It also lists the user as a financial contact to Core Staff, making it easier to contact the lab when needed.
	Edit Membership	The start date for the member. If this is set for a date in the future, the member will not be allowed to request services until that date.
	Remove Member	This icon will remove a user from the lab group. **NOTE:** This is not the recommended way to remove a lab member. It is recommended to set an "end date" for their membership (details below in "Editing Lab Memberships").

Editing Lab Memberships

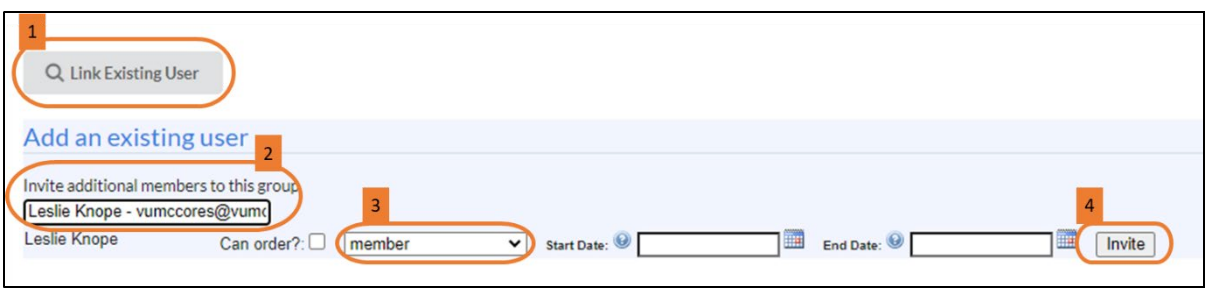
When you click the ***edit membership (pencil)*** icon, a pop-up will display to allow you to edit a user's membership.



Adding a New Member

To add a new member, you ***must*** have a **PI** or **Lab Manager** role within that group, and the new user ***must*** have an **existing iLab account**.

1. Within the **members** tab, navigate to the bottom of the page and click the ***Link Existing User*** button.
2. In the search box, type in the **user's name** and select the correct account.
3. Select their **role** (Member or Lab Manager).
4. Hit the ***Invite*** button.



Lab Group Roles

PI

- View available fund numbers.
  - Grant worktags – PI **automatically** has access via Workday nightly feed.
  - All other funds – PI will need to **claim** the fund. Contact your department administrator.
- **Automatically** granted access to voucher funds once activated via StarBRITE feed.
- Can grant self-access and grant lab members access to VUMC billing numbers, vouchers, and scholarships.
- Can add new individuals as a **member or manager** 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** or grant **lab members** access to VUMC billing numbers, vouchers, and scholarships.
- 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 access is granted to active fund).
- Can **view invoice** and reporting activity if member directly requested service or reservation in iLab.

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.
- The first financial contact in the lab will receive **iLab email notifications** (Invoice notification, financial approval needed, scholarship fund activated, etc.).
- This role is **responsible** for **approving** service requests that exceeds the lab group auto-approval threshold amount. If approval is needed, the user will receive an email notification.

Spending Thresholds and Approval Requirements per Lab Group

- Lab-level setting
- Any orders/reservations exceeding the threshold submitted by the PI's lab members must be approved by PI or those with financial contact ($) access to the lab group.
  - Any orders impacted by threshold will display with the "Awaiting Financial Approval" status.

Department Administrators

Only those with the department administrator role can claim Cost Centers, Gift or Program Worktags into a PI's Lab Group. The PI or Lab Manager does not have this functionality.

Department Administrator Role

- Department modules are established within workday. Department Administrators are assigned the administrator role per department.
- PI lab groups are added to department modules. If the PI lab group is assigned to your department module, you can:
  - View invoices and charge reporting
  - Claim cost centers, gift or program worktags into the PI's Lab Group

    Assist in managing access to funds to various lab members after the fund numbers have been activated.

Billing Number Management

VUMC Billing Numbers

All internal VUMC billing numbers for VUMC investigators are activated via a nightly feed from Workday.

Key Points

- Sponsored Funds:
  - Types: **Grant** Worktags
  - Auto assigned to PI's VUMC Lab Group via feed.
  - Only one PI lab group per sponsored fund. This cannot be edited in iLab, it is controlled by Workday integration.

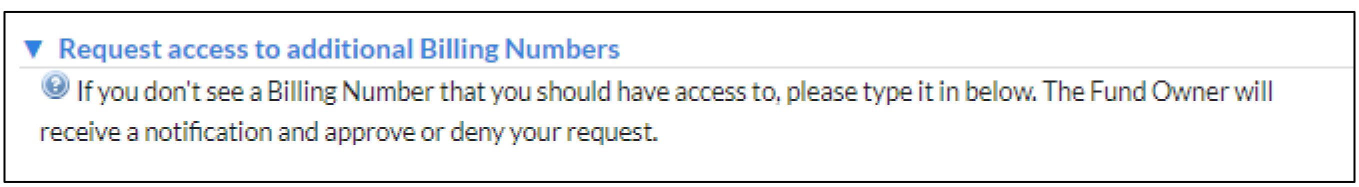
- Non-Sponsored Funds:
  - Types: **Gift** worktag, **Project** worktag, **Cost Center**
  - PI or Department must 'claim' the fund number in the PI's Lab Group Module.
  - Multiple lab groups can claim the same non-sponsored fund number.

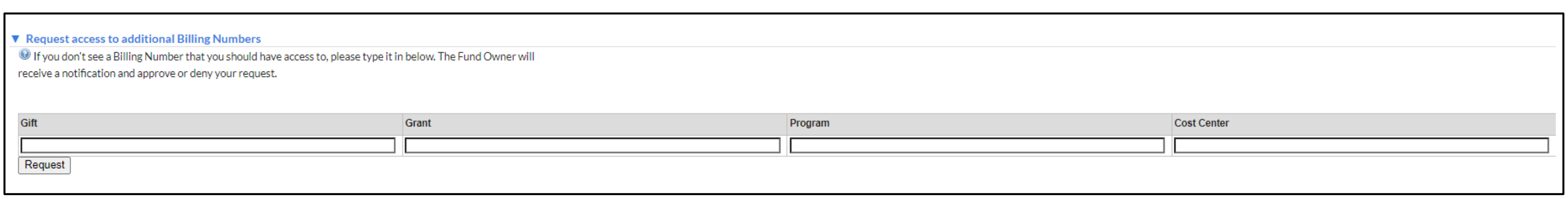
Claiming a Gift, Project, or Cost Center Worktag

After the nightly feed, the PI or lab manager will need to claim a gift, project, or cost center worktag for the lab group.

Instructions for PIs or Lab Managers:

1. Click on the ***my groups*** on the left side of the iLab page.
2. Click on the lab name under the ***Labs/Groups I Manage*** section.
3. Click on the ***Membership Requests & Billing Numbers*** tab
   a. All active and claimed billing numbers, vouchers, and scholarships will display here.
4. Click on the ***Request access to additional Billing Numbers*** option.
   a. In the **appropriate** box (Gift, Grant, Program, or Cost Center) type in the billing number exactly as it appears in Workday and hit ***Request.***





Granting Lab Members Access to VUMC Funding

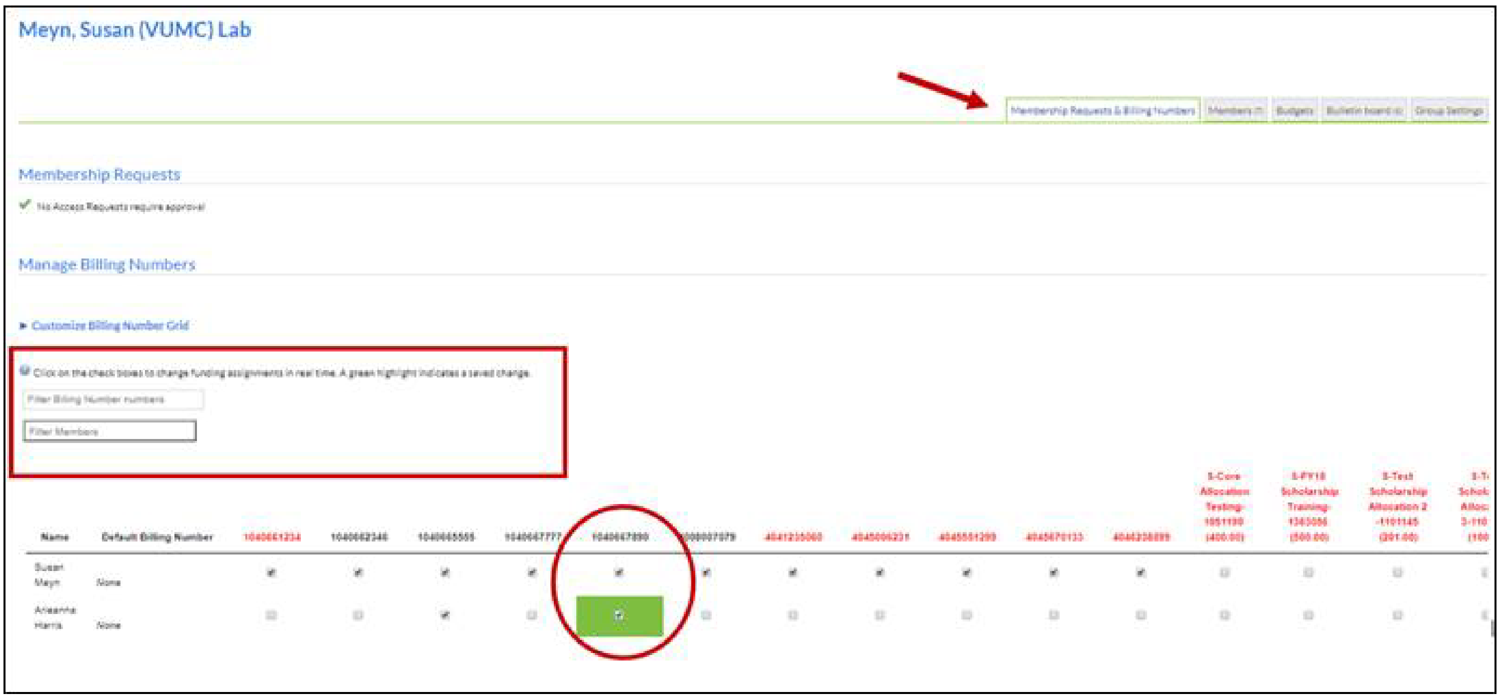
After a billing number is claimed, the PI or Lab Manager can grant lab members access to the specific fund numbers.

If you also need the lab manager role for your investigators to assist with this process, email VUMCcores@vumc.org and we will update your account.

Instructions for PIs 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.

TIP: Use the Filter options at the top of the lab group grid to find the billing number (cost center, voucher, scholarship fund)



VU Billing Numbers

To activate or manage VU billing numbers, users should complete **a webform** on the **Office of Research website**.

- VU Department Administrators, PIs, Lab Managers, or Lab Members can submit the webform.
- Please allow 24-72 business hours for processing.

Examples of VU Billing Numbers

VU users are instructed to use their full CoA/ POET numbers.

COA number for all VUMC Cores usage except for Division of Animal Care
###.05.#####.6250.###.###.###.0.0

COA for Division of Animal Care
###.05.#####.6265.###.###.###.0.0

VU Project billing number consist of the project number concatenated with task number with a period separating them. Please note task number can range from 1 - 20 digits).
######.#
AA_######.#
AAA_######.#

Granting Lab Members Access to VUMC Funding

- VU will indicate on the webform if the VU number should be shared with all members of the VU Lab Group or specific members.
- If the PI or Lab Manager wants to add members later or add a new member of the lab, email VUMCcores@vumc.org. We will grant access to the VU billing number for the new VU lab member.

Vouchers

VICTR vouchers are activated via an overnight feed from the StarBRITE application. If the user that has been awarded the voucher has a VUMC lab group setup in their name, the voucher will automatically appear.

Key Points

- Vouchers are added into iLab via **overnight feed** from the StarBRITE application.
- The voucher is added into iLab based on the awarded investigators email.
    - Make sure the email listed in iLab **matches** what is on the voucher award in StarBRITE.
- Voucher funds are **core specific**. You can only use your voucher to purchase services from the assigned VUMC core facility.
- Any **pending** purchases will also **encumber** against the available balance in iLab.
- Since the vouchers represent funding from VICTR. A VUMC lab group will need to exist for the individual awarded the voucher.

    - **VUMC Users**: The PI will see their voucher in their "VUMC" Lab group.
      Example: Smith, Jane (VUMC) Lab

    - **VU Users**: The PI will see their voucher in their "VUMC Scholarship & Voucher" Lab group.
      Example: Johnson, Jake (VUMC Scholarship & Voucher) Lab

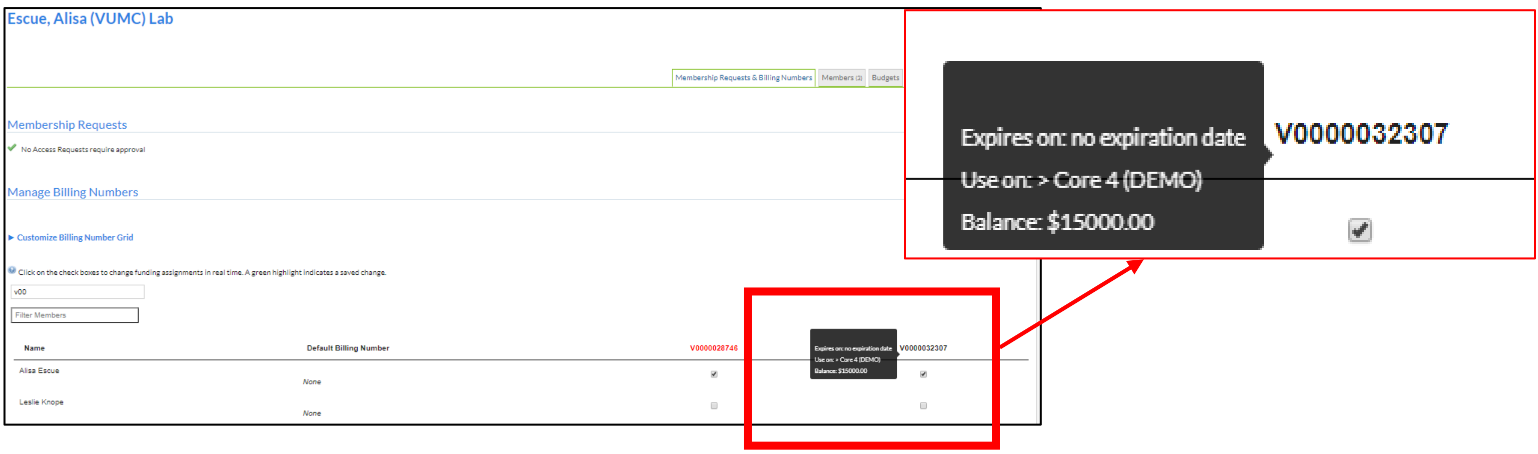
Troubleshooting: If you are unable to view see your voucher in iLab, please contact the VUMC Office of Research support team at VUMCcores@vumc.org. To resolve, we will need the voucher redemption ticket associated with your award. The ticket will reference the VICTR award number (VR) and the name of the individual that received the award.

Viewing Voucher Information in iLab

PIs and Lab Managers can view the following information for each awarded voucher in the PI's fund grid.
*Only the PI and lab managers will have access to the PI's fund grid.

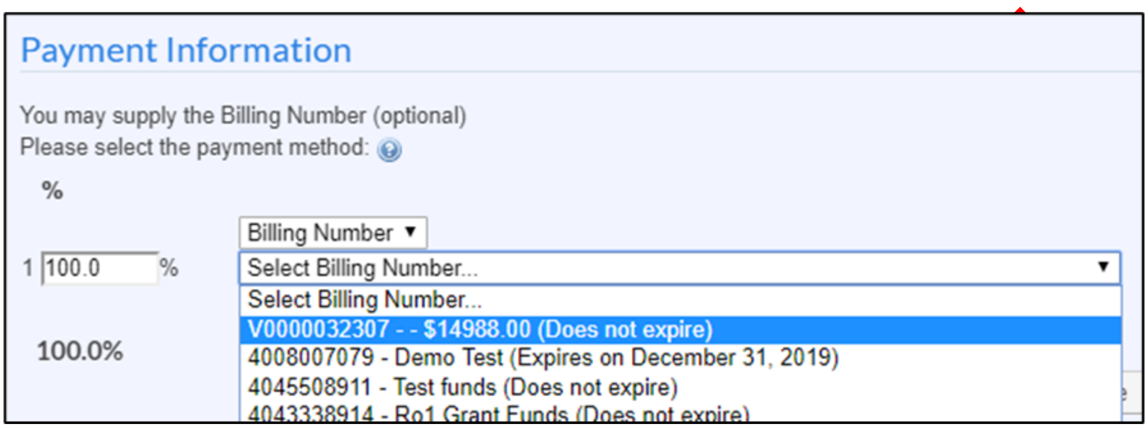
- **Voucher Number** (i.e, V0000012345)
- **Hover over the voucher number to view:**
  - **Expiration date**
  - **Core Name**
  - **Balance:** the remaining amount available to spend

NOTE: To view the PI's fund grid, click 'My Groups' in the left-hand navigation panel. Select the applicable lab group. Then click the 'Membership Requests & Billing Numbers' tab of the lab group module.



The **remaining balance** can also be viewed when requested core services or making a reservation in iLab.

- The amount that displays next to the voucher number is the remaining balance amount.



<u>Balance Notes:</u> Any pending purchases will also encumber against the available balance in iLab. This includes:

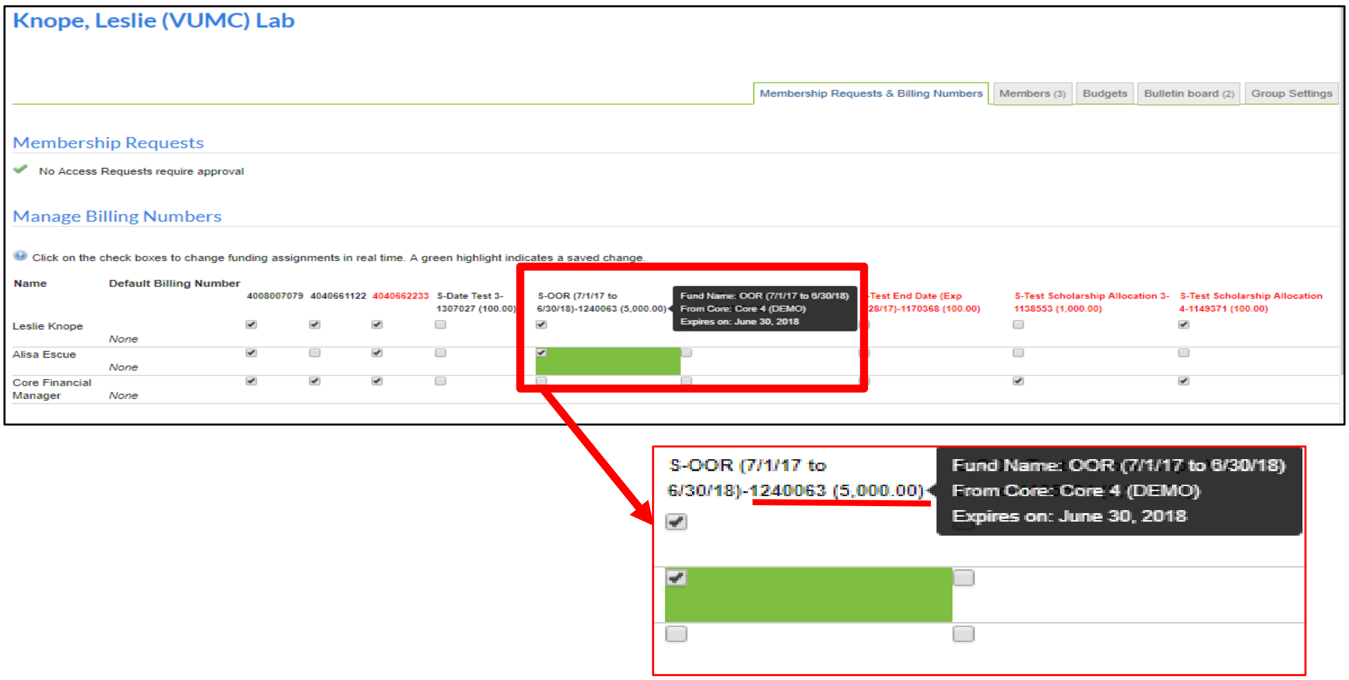
1. Service added to an open project that have not yet been marked as complete.
   a. This typically happens when a core has provided an estimate/quote of services via the iLab application.
2. Pending reservations that have not yet occurred.

Scholarships

Scholarships are credit vouchers redeemable in center-supported core facilities. They are center and core specific and are awarded by centers to member investigators at the beginning of each center's grant year and expired at the end of that year. Once expired, a scholarship voucher cannot be reactivated, and the unused funds do not roll forward. Viewing Scholarship Information in iLab

PIs and Lab Managers can view the following information for each awarded scholarship in the PI's fund grid. The PI and lab managers will have access to the PI's fund grid.

- **Scholarship fund number** (i.e, 1240063)
- **Expiration date**
- **Core Name**
- **Awarded amount**

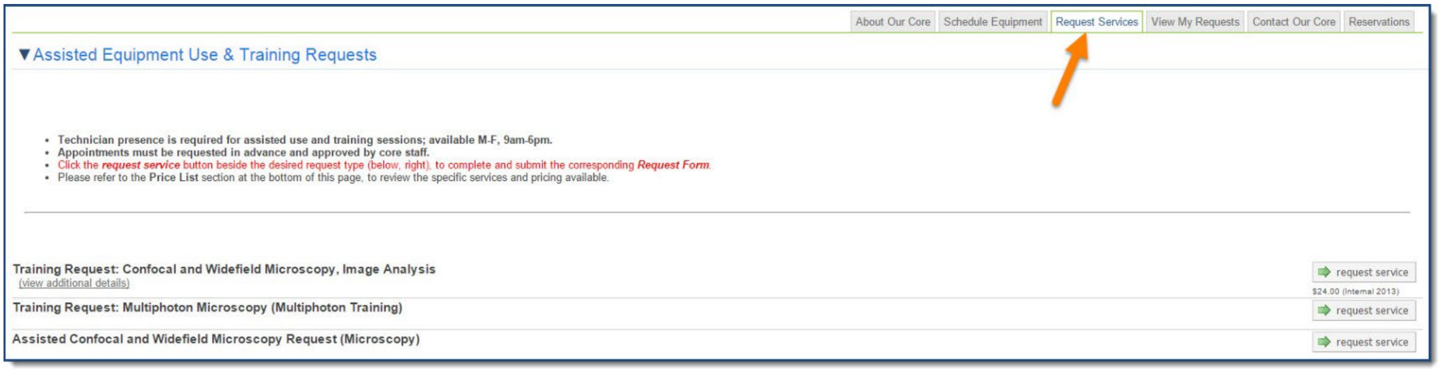


How To: Request Services

Requesting Services

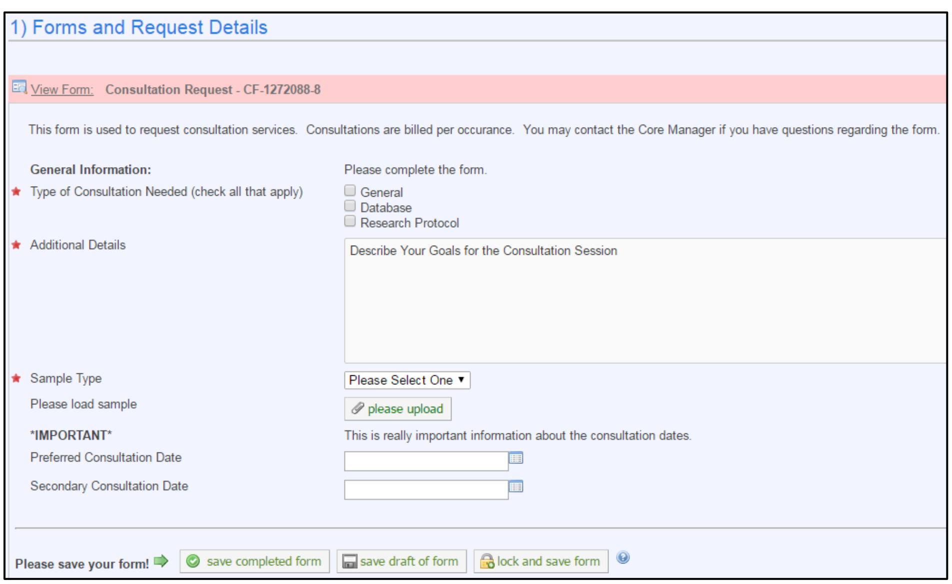
Some cores will require you to initiate new service requests in iLab. Once you have selected a core, you can request a service by doing the following:

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

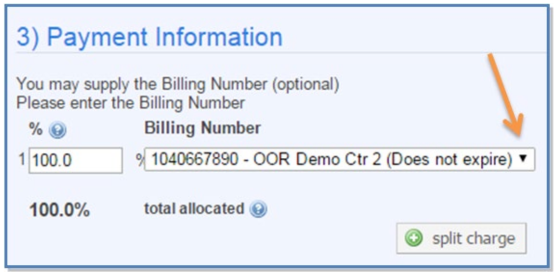


2. Click on the ***Request Service*** button to the right of the service you would like to request.
    a. A submission form will open.

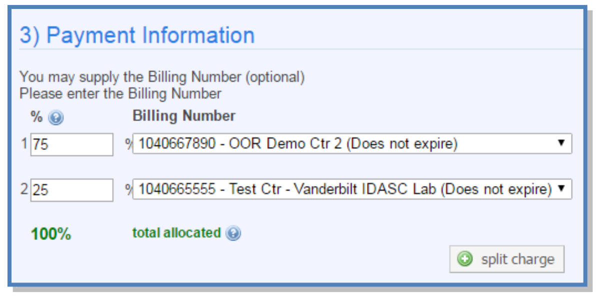
3. Complete the submission ***form***.
    a. Be sure to complete all required fields marked by a red star.



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**.

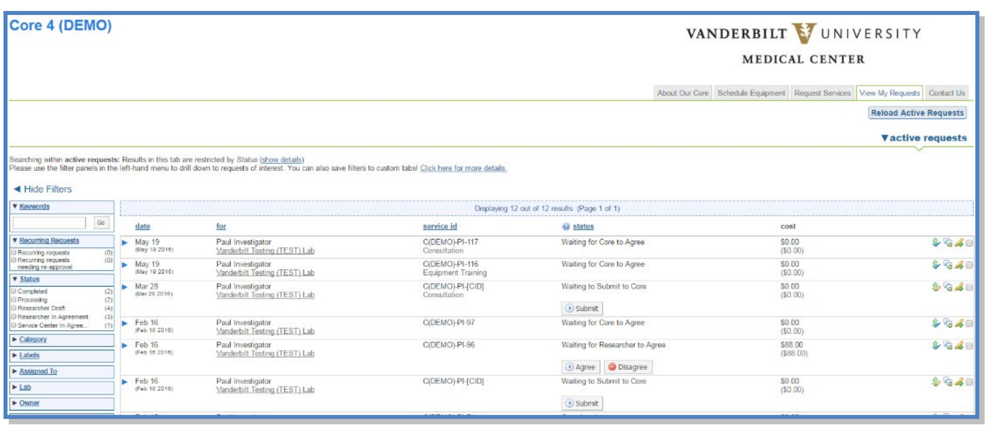


    b. **Split Charge:** The cost-of-service requests can be allocated across center numbers.
        i. To allocate across multiple center number, click ***split charge***.
        ii. Select the additional center number from the drop-down menu.
        iii. Enter the % allocations to split the cost across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



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

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.

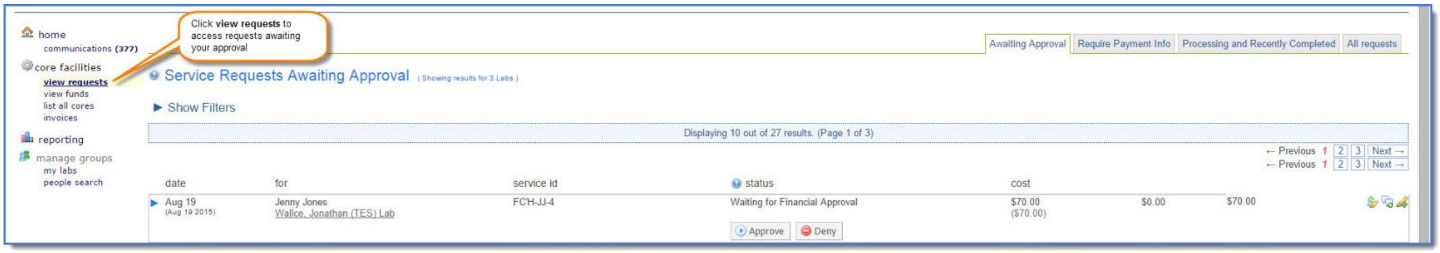


7. You will receive **emails from iLab if further actions are required** for your request to be processed.
    a. Please follow the instructions in the emails.
    b. **Contact the core** or support@ilabsolutions.com if you have any questions.

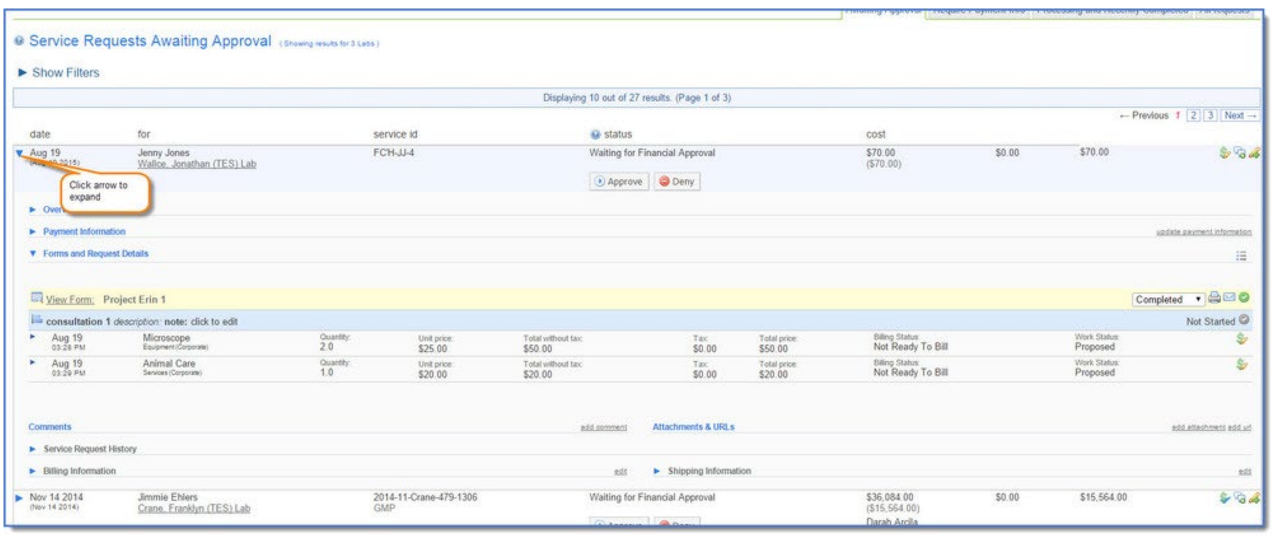
Approving a Request

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.

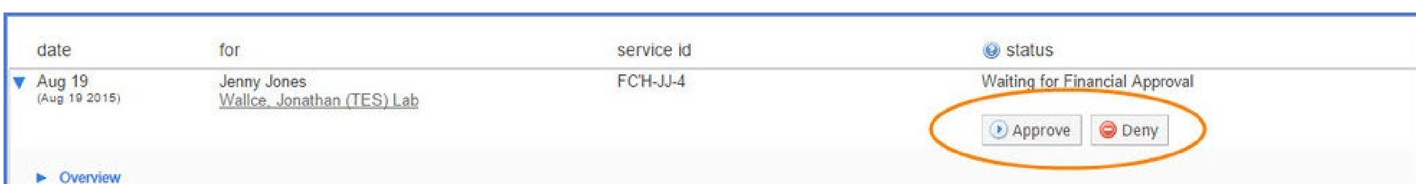
1. You can see all requests that require your approval by clicking on ***view requests*** under the core facilities section on the left-hand menu on any iLab page.



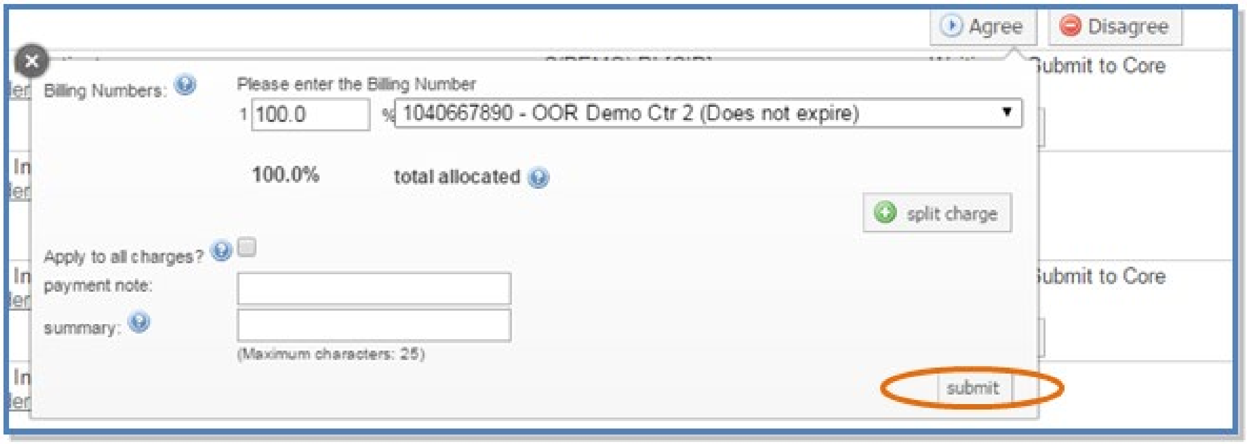
2. All service requests awaiting your approval will be listed. Click the ***blue arrow*** beside the service request to expand the information displayed.



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. <u>If needed, you can update the payment number</u> 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.

<u>Email Notification Notes:</u>

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.

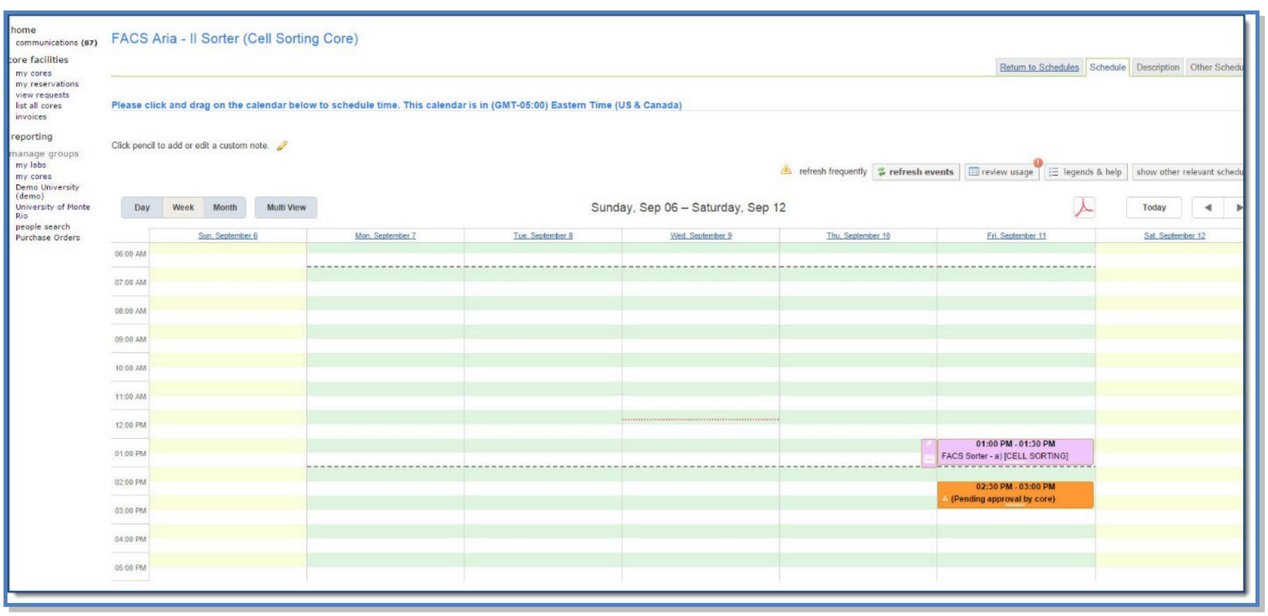
How To: Request an Equipment Reservation

Once you have selected a core, you can request a reservation by doing the following:

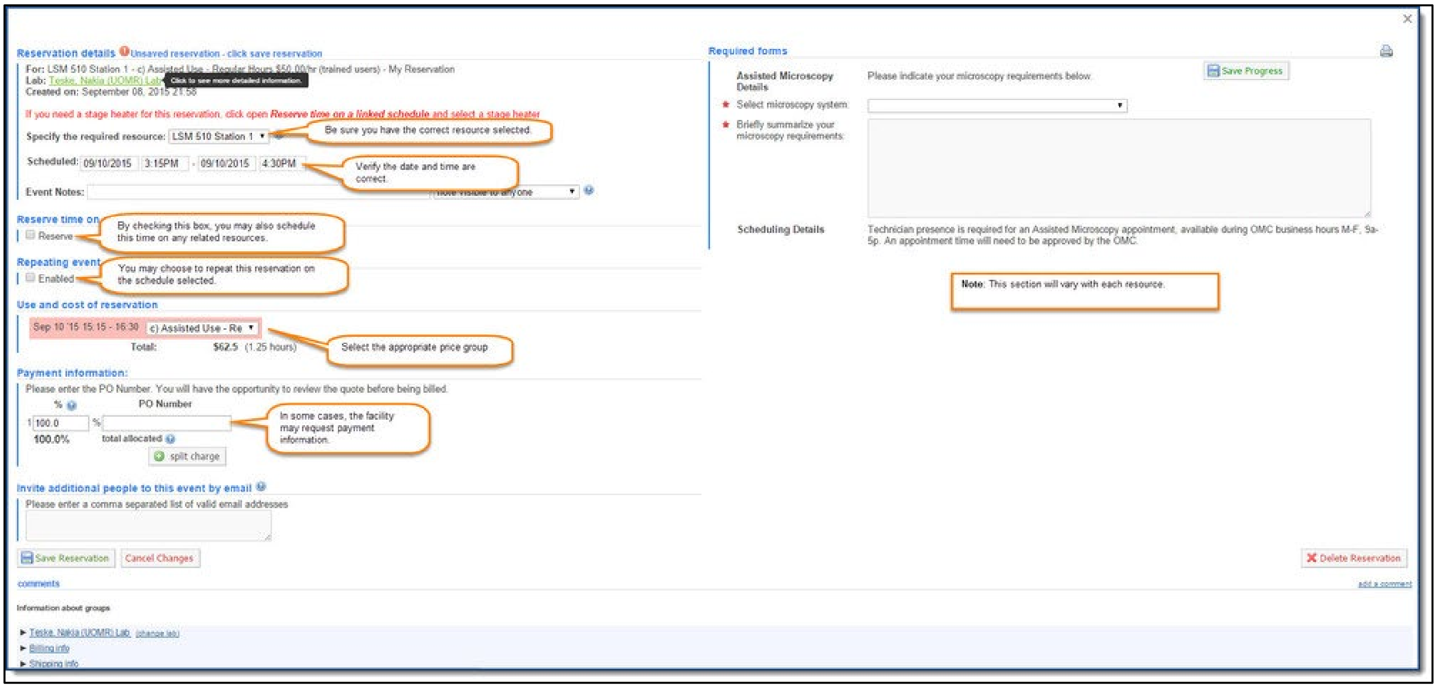
1. Click on the ***Schedule Equipment*** tab. On the Schedule Equipment page, there will be a list of available instruments.

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.

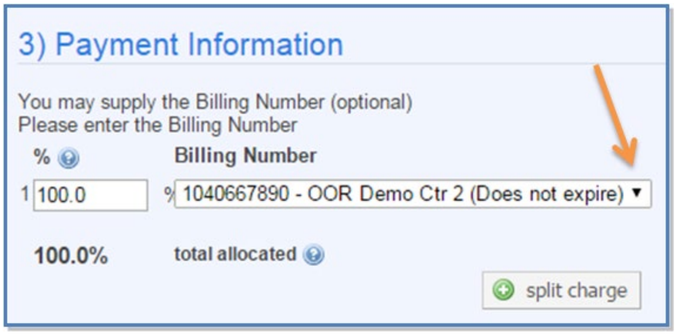


4. A **submission form** will open, **complete** the form.
    a. Enter a description of the event in the ***Event Notes*** field (optional). This information will display on the calendar.
    b. Be sure to complete all required fields marked by a red star.

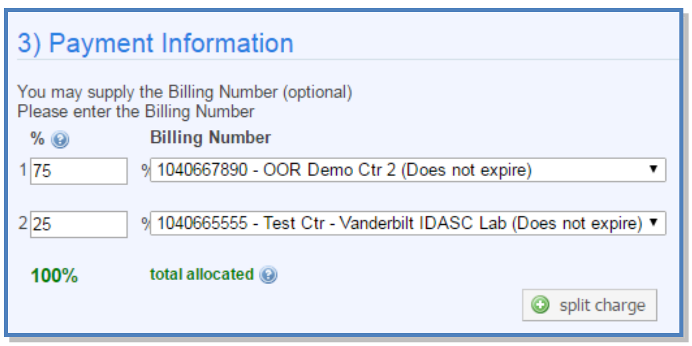


5. In the ***payment information*** section, select the correct center number from the ***drop-down menu***.

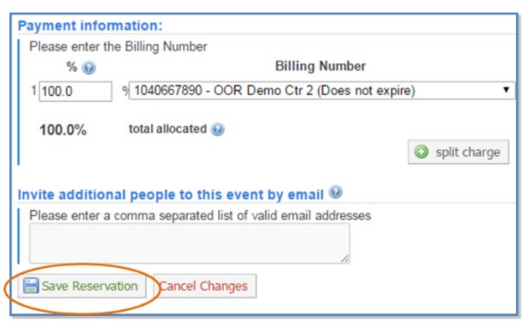
   a. If the center number is not available, contact your **lab manager.**
      i. **Lab members** will need to be **granted access to activated center numbers** by the PI and/or the Lab Manager.
      ii. PI or Lab Managers will need to contact the department administrators **to activate new center numbers in iLab**.



   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.



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



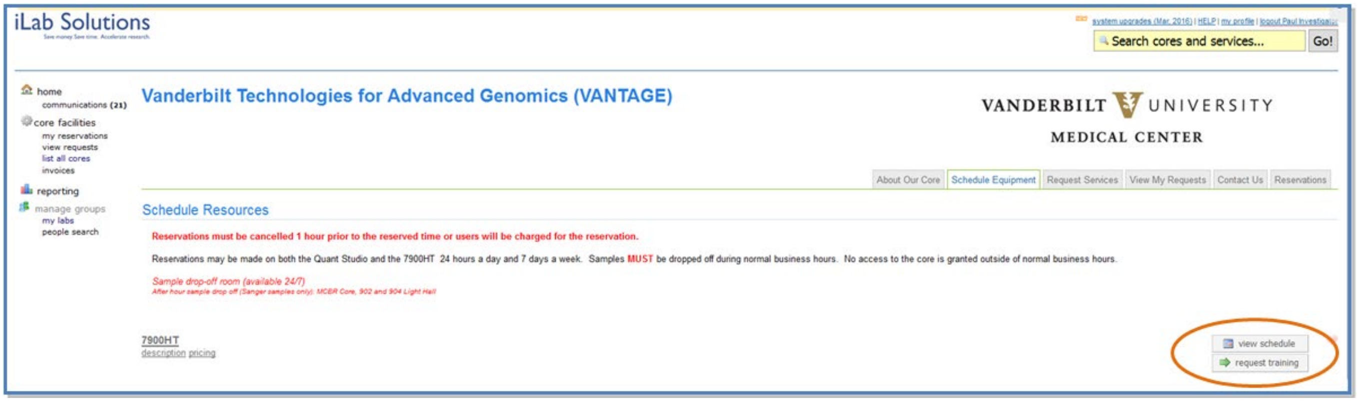
7. You will receive **emails from iLab if actions are required** for your request to be processed.
   a. Please **follow the instructions** in the emails.
   b. **Contact the core** if you have any questions.

Equipment Reservation Notes

Trained Users:

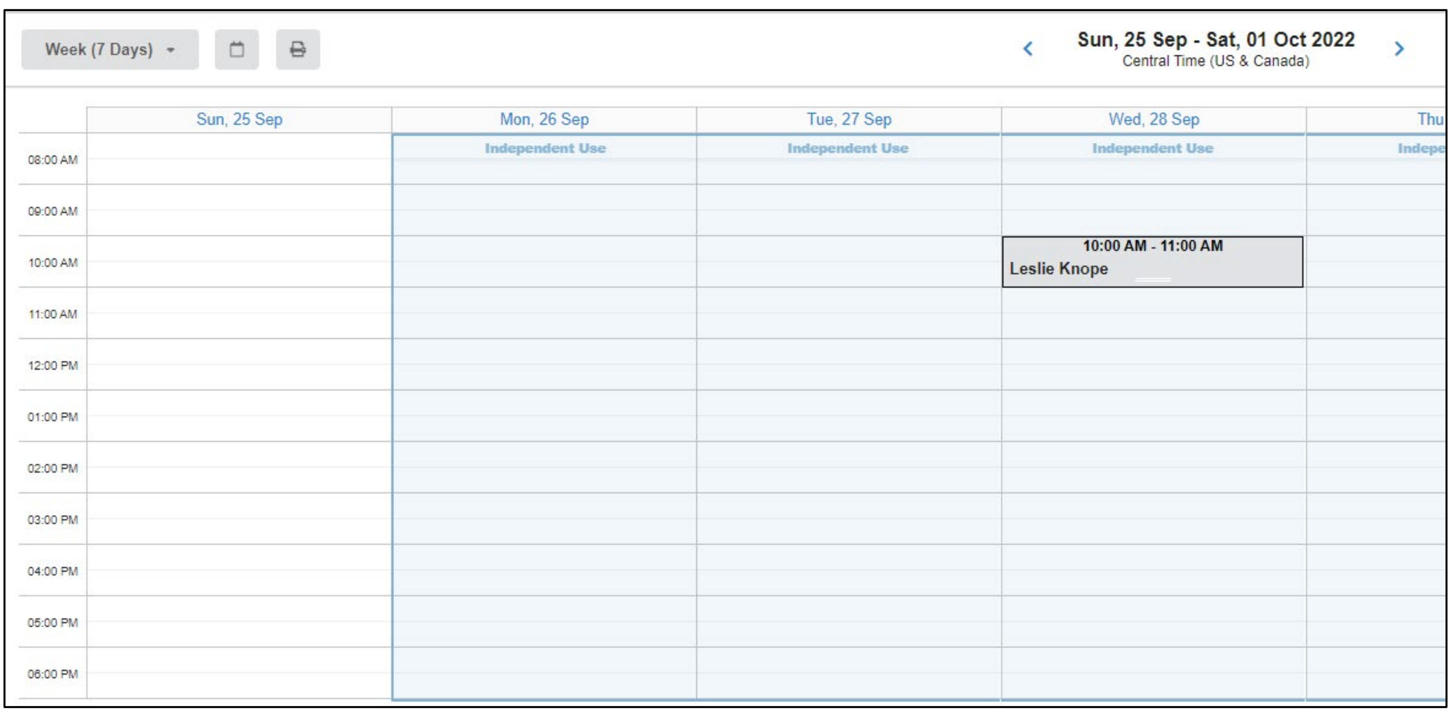
In some cases, cores require only allow trained (or approved) users to schedule time on specific instruments.

- If you have access to the calendar, you will be able to select view schedule and make a reservation.
- 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 **Gray**.



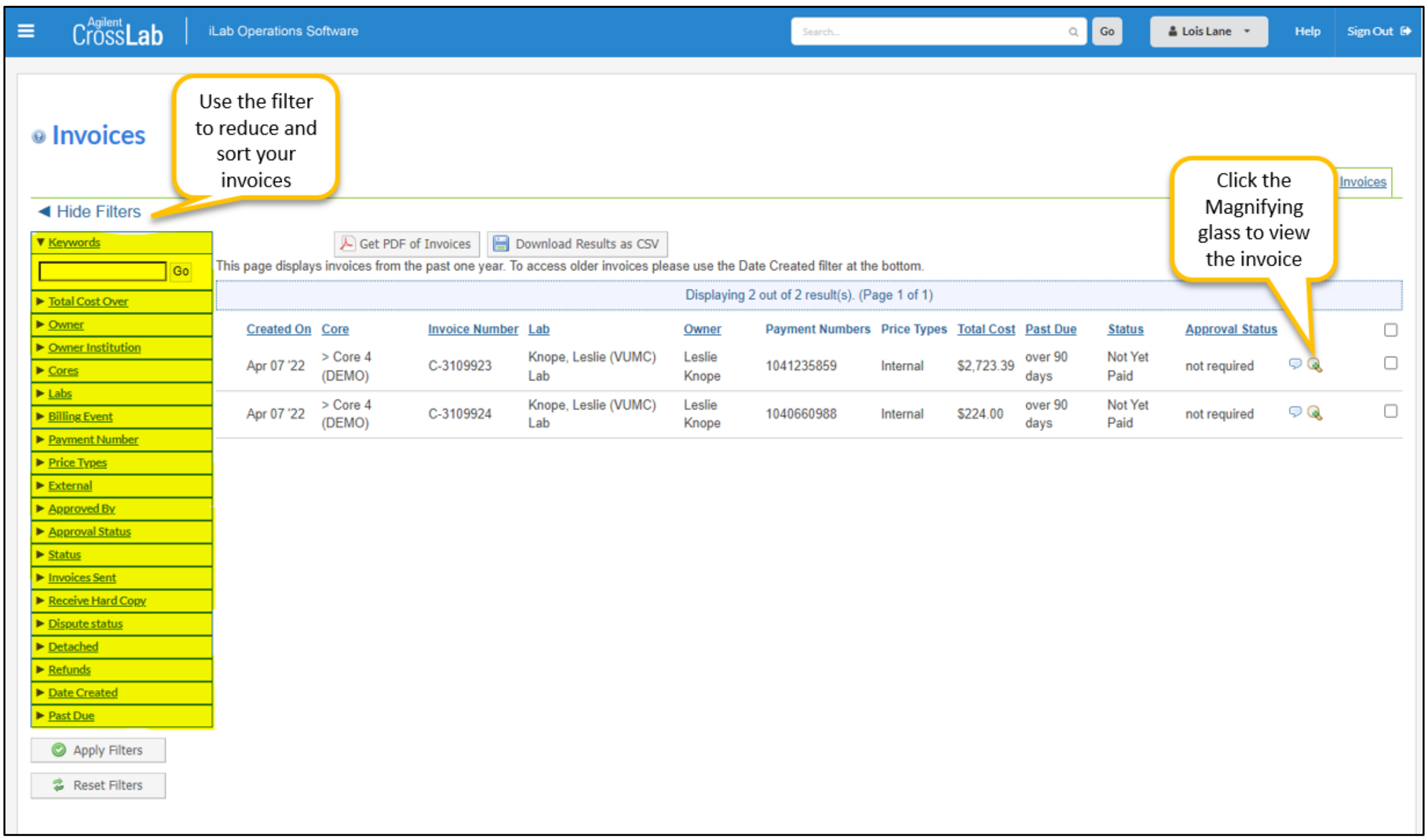
Invoice Review

From the left-hand 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. A **list of invoices will appear**.

2. **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**'.

3. On the far right, click the **magnifying glass** to view the actual invoice.



Reporting

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

Running a Report in iLab

1. Click on the **My Departments** label in the left menu to navigate to your department module.

2. Once your department module displays, click the **Reporting** tab.

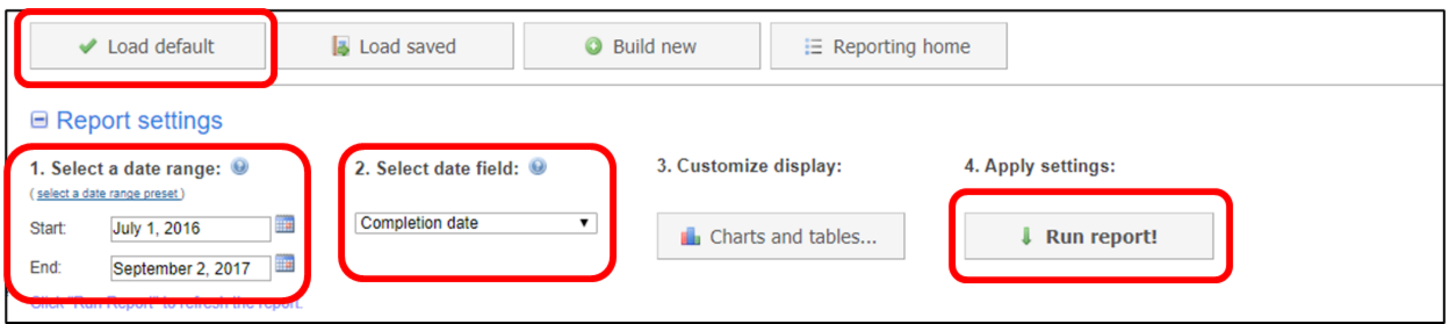
3. The reporting module will display. Select **Load Default** to load the iLab default report settings (recommended).

4. 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.

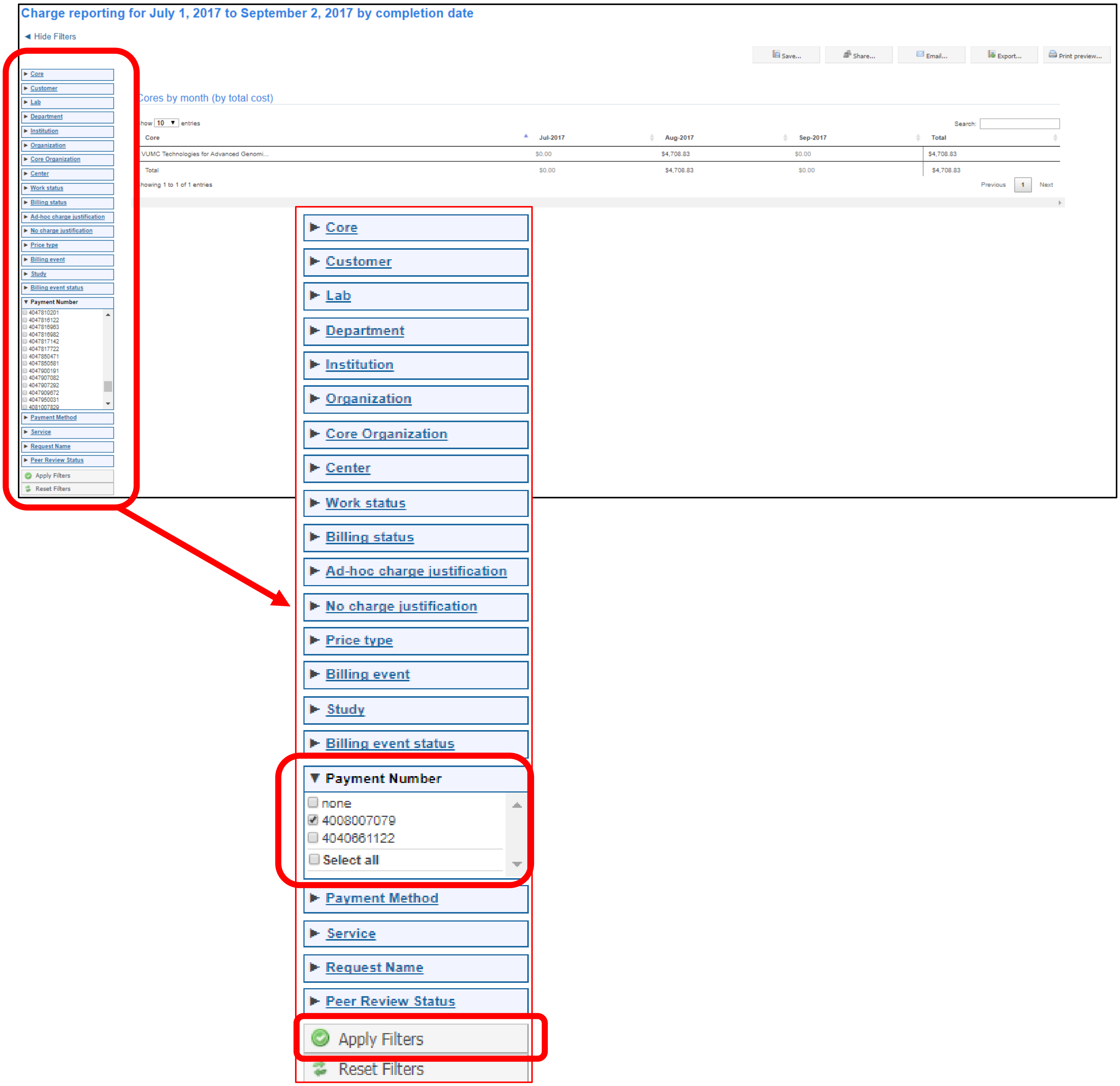
5. Click **Run Report**
    a. This will generate a high-level report that will include charges across billing numbers, PIs, and cores.



Refining the Report

To refine the report and specify the data down to a certain PI, billing number (*VUMC center number*), and/or core.

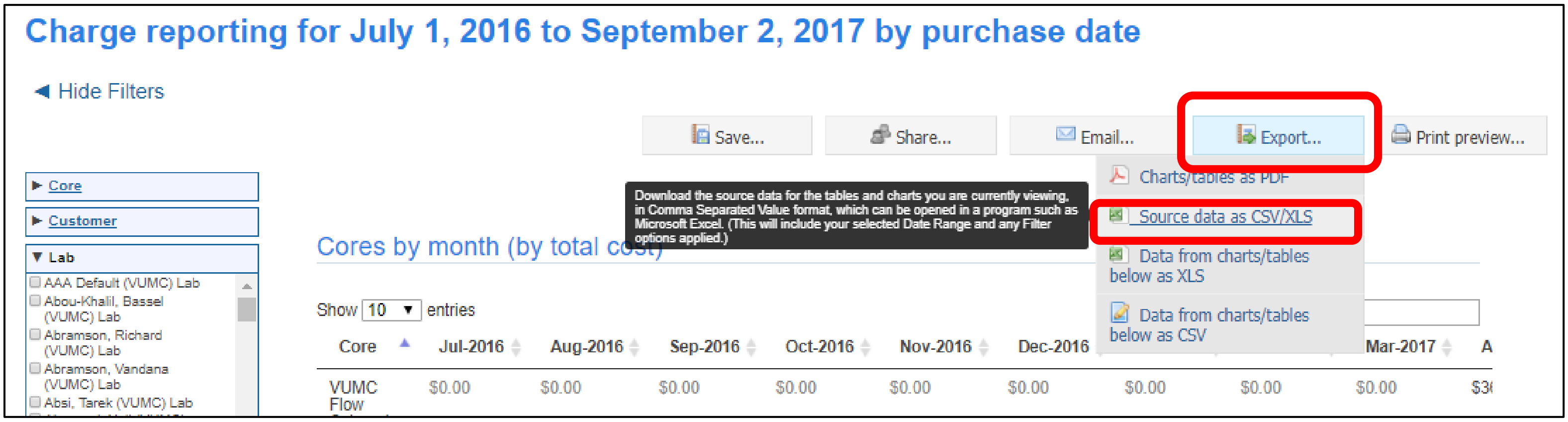
1. Using the **filter panel** on the left side, **adjust the filters** (i.e., "payment number") to refine the report.
2. Click **Apply filters**.
3. The report will update with data specific to those filters.



Reviewing and Exporting Reports

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.**

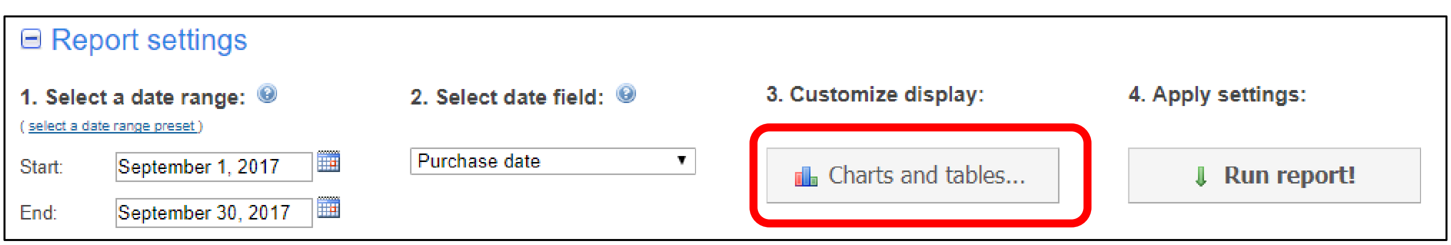
Report Export Notes

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.

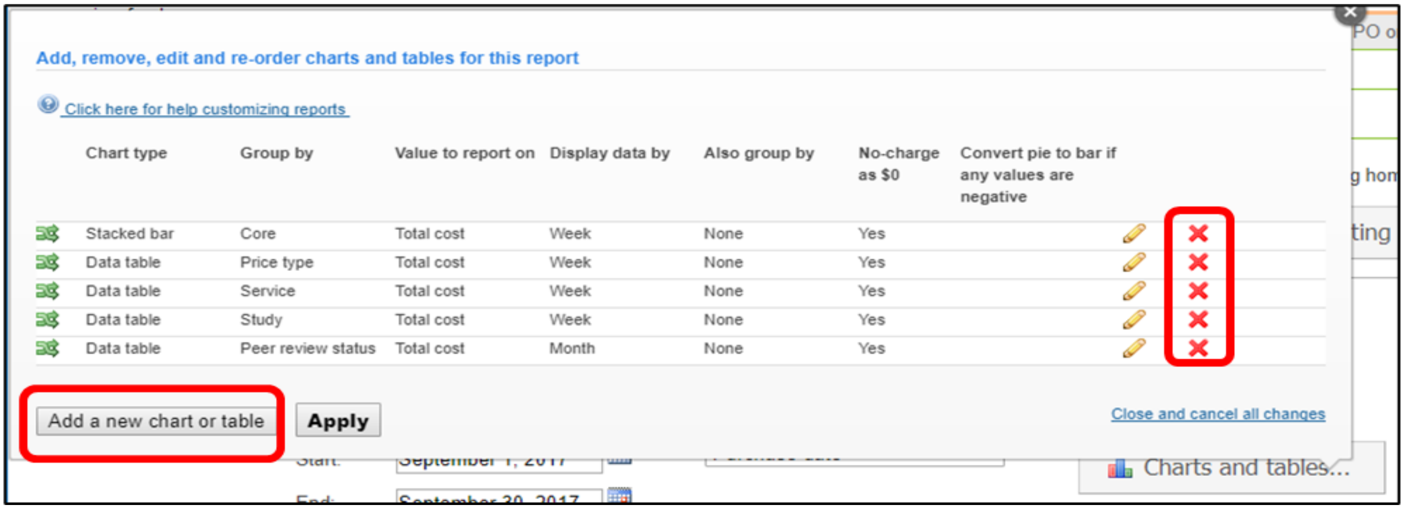
Charts & Tables: This information can also be viewed without generating an export file through the Charts and Table option.

1. In the report settings, click the **Charts and Tables** icon.

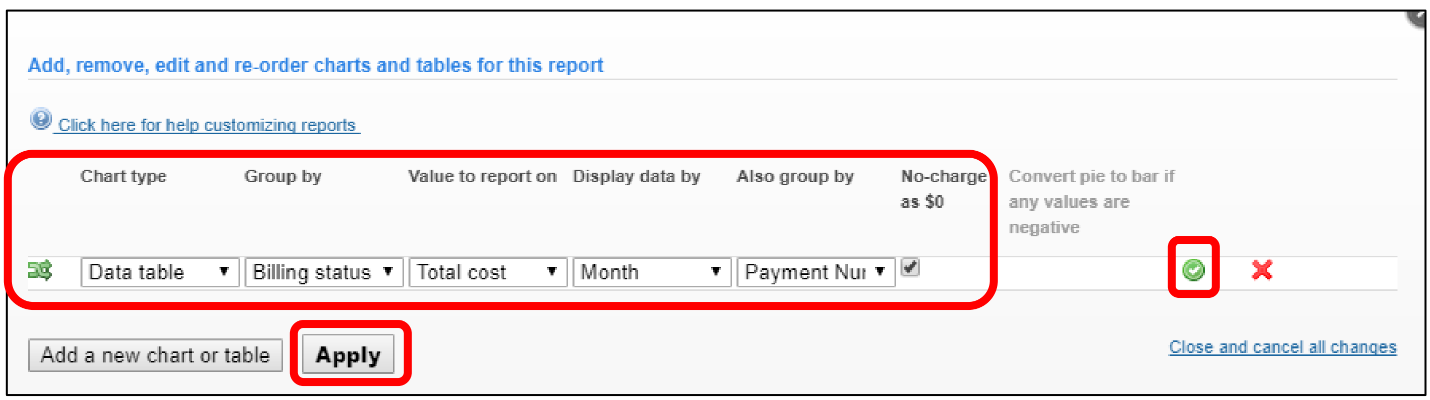


2. TIP: Click the red x to remove all the pre-populated charts.

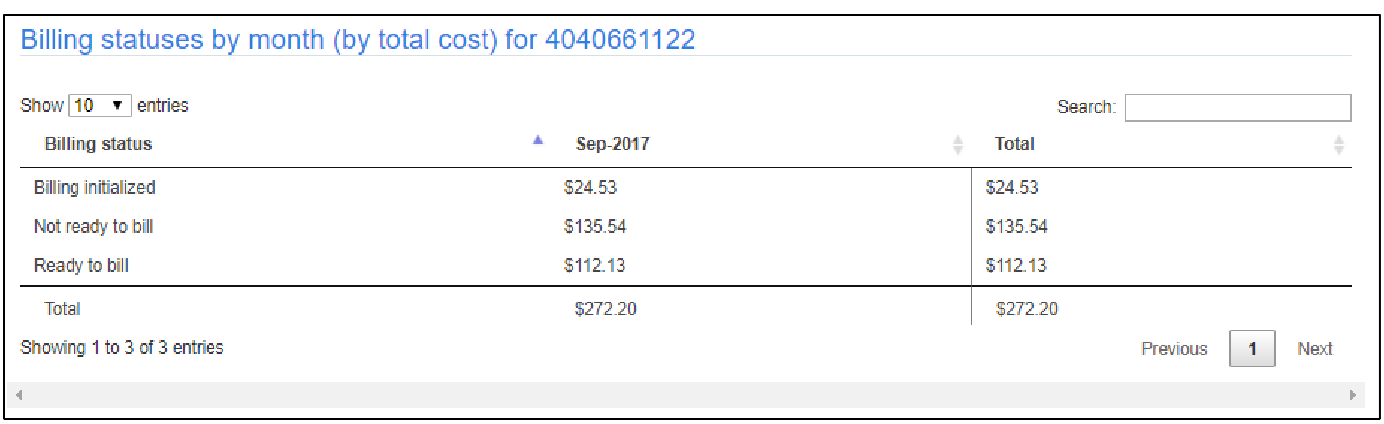
3. Click **Add a new chart or table.**



4. 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.



5. 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.


Billing statuses by month (by total cost) for 4040661122

Show 10 entries Search:

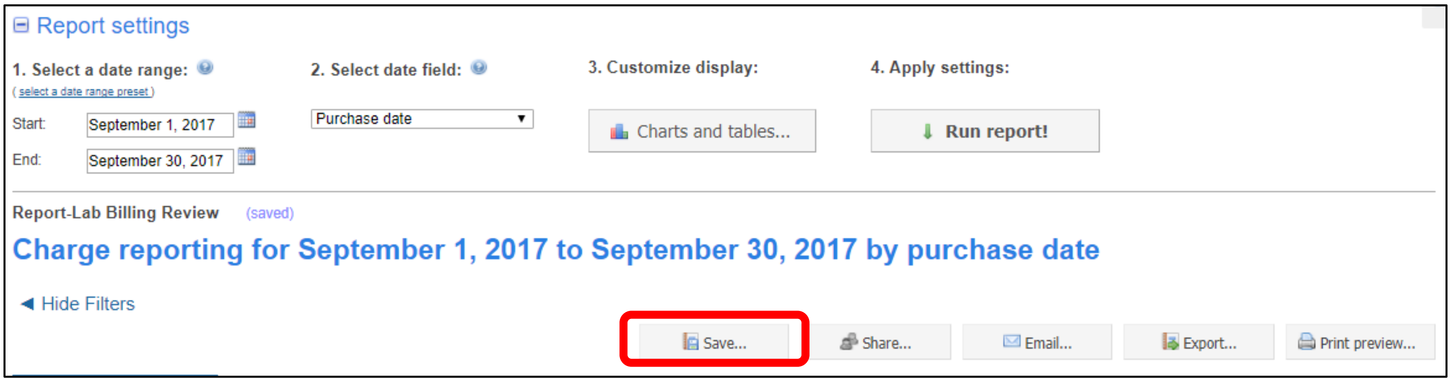
Billing status	Sep-2017	Total
Billing initialized	$24.53	$24.53
Not ready to bill	$135.54	$135.54
Ready to bill	$112.13	$112.13
Total	$272.20	$272.20

Showing 1 to 3 of 3 entries Previous 1 Next

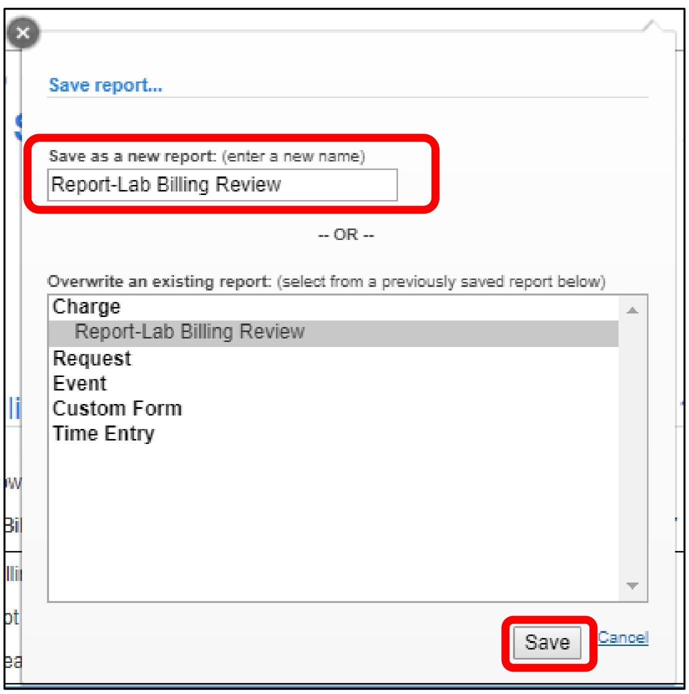
Saving a Report to be Generated Again

A 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.

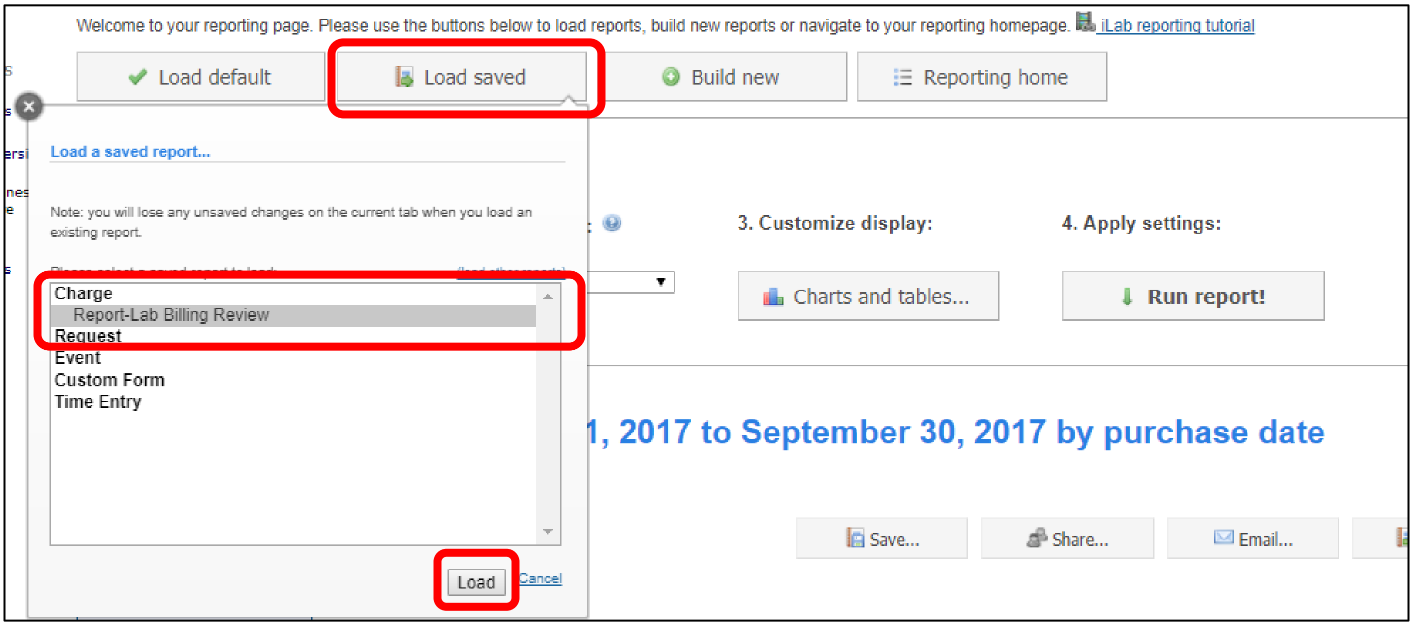


5. **Enter a name** for the report. Click **Save.**

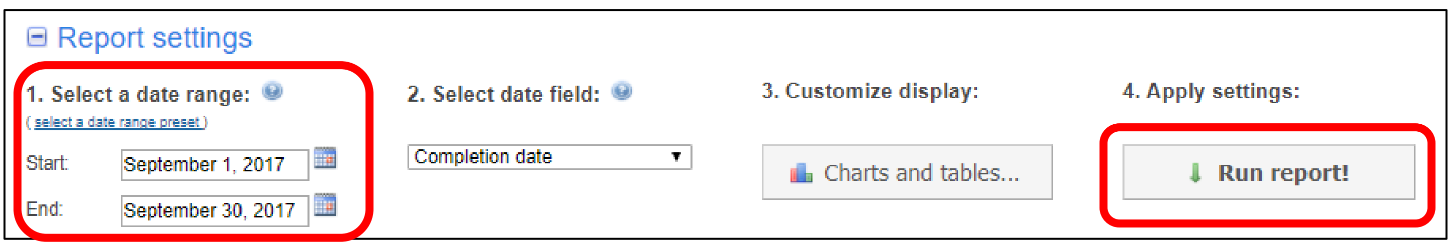


To run a saved report:

1. Click **Load saved**
2. Select the saved report.
3. Click **Load**



a. **Update the dates** for the report and click **Run report!**



Reporting Tutorial

For additional details on available reporting tools in iLab, view the **iLab reporting tutorial**.