# Principal Investigator/Lab Manager iLab User Guide

**VU and VUMC Users**

**iLab Site :** https://vanderbilt.corefacilities.org

**Section 1:** Billing Numbers
**Section 2**: Members
**Section 3:** Budgets
**Section 4:** Bulletin Board
**Section 5:** Group Settings
**Section 6:** My Requests Page
**Section 7:** Invoices
**Section 8:** Reporting

To set up a new iLab account, and/or check the basic functionalities for your account, please go to our Setting Up a New iLab User Account Guide for instructions.

**Please Note**: When users from VUMC wish to utilize a VU Core, they must select their **(VU) Lab**. Any requests or reservations using a (VUMC) Lab will be rejected and/or canceled, and the user will be notified they must resubmit their order or reservation using a (VU) Lab that they are a member of. For users to join a (VU) Lab, Department, or to have a Lab created, they must already have an iLab account, and must submit the form that correlates with their role.
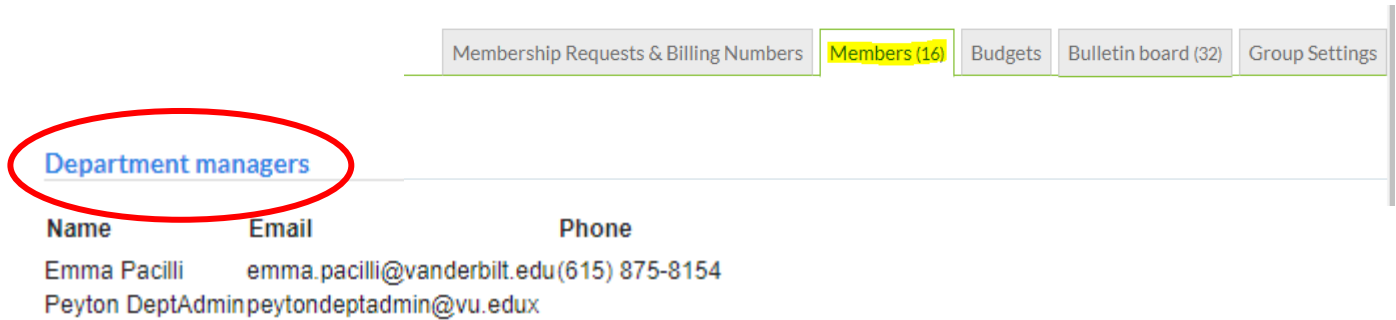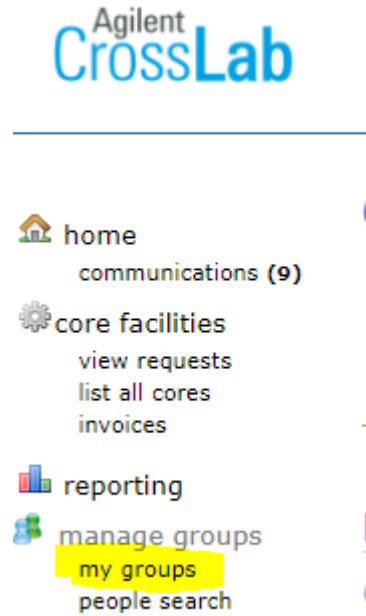
# 1. Billing Numbers

To have a billing number added to your lab, you must contact your Department Manager in iLab.

If you do not know who these are, you can see who is a Dept Manager in iLab by going to your Lab.

To do this, you can either hover over "My Groups" in the left hand menu and select your lab in the pop up, or click on "My Groups", and select your lab on the next page.

Then Click on the "Members" tab on the right side for the screen. Scroll to the bottom of the screen, and you will see a list of your Department Managers.

If you do not see any names listed under the Department Managers heading, please submit the Principal Investigator form.



**Membership Requests & Billing Numbers Tab** – under this tab you can manage all lab membership requests, as well as assign which members have access to each billing number.



Only the PI is given automatic access to any billing number added to a lab. Department Managers/Administrators, PIs and Lab Managers can approve membership access requests to the lab, and assign billing number access for each member in the lab.

Any scholarships or vouchers that have been awarded to the PI will show up here. Scholarships will remain **S** fund numbers, and Vouchers will remain **V** fund numbers.

Only the billing numbers that a member has access to will show up in their fund drop down menu when the lab members are making service requests or reservations with a VU Core.

When you check a box, it will turn green the first time to show you that the change has been saved.



You can also assign a **Default Billing Number** for each lab member. You can only select a billing number that the user has been given access to. This number will be auto selected in the drop down menu when purchasing from the core. The lab member can select another billing number from the drop down menu (if access has been granted). To do this, click on the *"None"* next to the user's name under the **Default Billing Number** column, and select a number. This is especially useful for those that only have access to one billing number, or if a billing number is the predominant one used.



For PI's who have VA funding, you will have another lab labeled as such. Ex. Smith, John (VA-TVHS) Lab. You must use your VA lab if you would like to use your VA funding. Please note, Lab Managers and Members are not automatically added to your VA Lab, and a request must be submitted to our office by emailing coresvu@vanderbilt.edu.

## 2. <u>Members</u> – under this tab you can set the lab thresholds, as well as manage lab memberships.
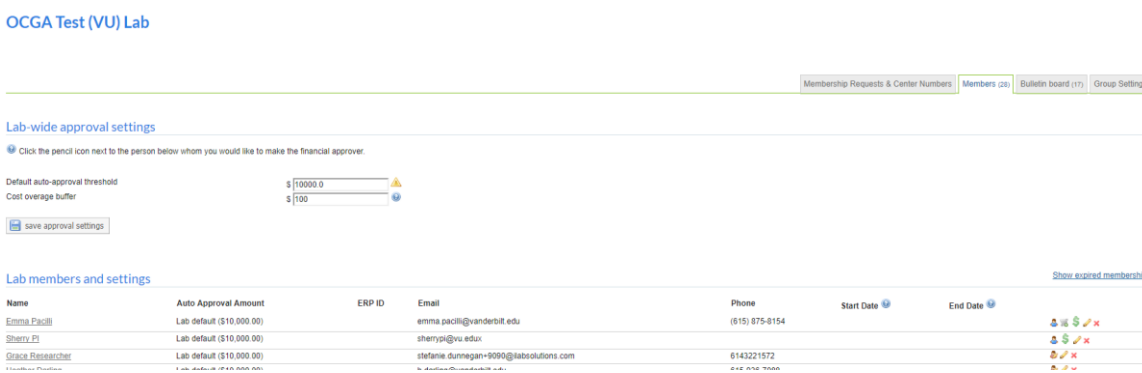


**Lab-wide approval Settings** – here you can set the *Default auto-approval threshold* and the *Cost overage buffer.*

    a.   The *Default Lab Auto-Approval Threshold* has an institutional default of $10,000 per order, and can be altered for your lab here.
- This indicates at what dollar amount a financial approval for the lab is required for one order from one core.
- For no change to the institutional default, the amount should be set to 0.

    b.   The *Department Level Service Request Approval* has an institutional default of $100 per service request, and can be altered for your lab here.
- This buffer amount is in relation to the overage of any approved service requests already given.
- For no change to the institutional default, the amount should be set to 0.

**Lab members and settings**- here you can add user as members to the lab, change their role within the lab, make them a financial contact, set an expiration date, pull members back who have rejoined the lab after they their membership has been expired, and remove members from the lab.
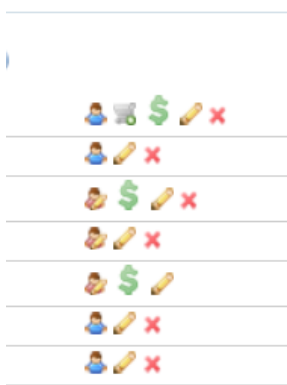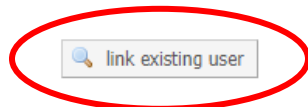


To know which role a member has, hover over the people icon.
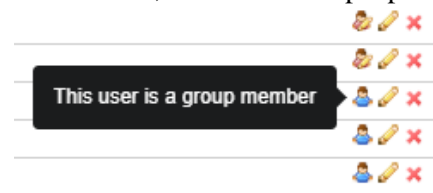


To edit their role within the lab, click on the pencil icon.

To remove a user from the lab, press the **X** next to their name.

To add a user to the lab, scroll towards the bottom of the page. On the left side of the screen you will see a "Link Existing User" button.



**Department managers**

| Name | Email | Phone |
| --- | --- | --- |
| Emma Pacilli | emma.pacilli@vanderbilt.edu | (615) 875-8154 |

Once you click on it, start typing the name in the search field, and then select the person you are looking for. If the person is not there, that means they do not have an iLab account, and must set one up. They can do this by following the instructions to set up a new account.

The only exception to this is if you are from VU and you are trying to add a person who is from VUMC, or vice a versa. If this is the case, pleas contact ilab-support@agilent.com and provide the lab name (ex. **Smith, john (VU) Lab**), the user's name, email address, VUnet ID and lab role in the email. .

You can then select which role you would like the person to have.
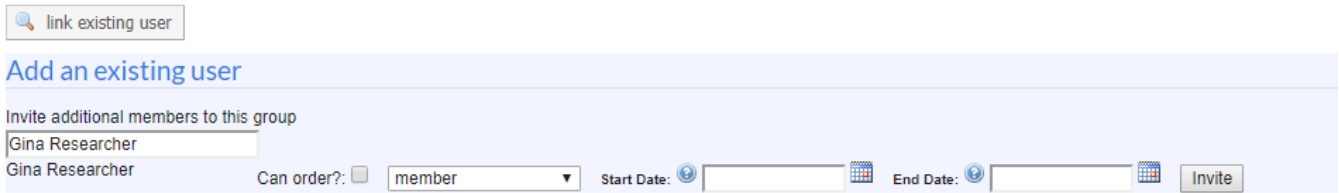


They can be either a:

- *Principal Investigator* (Labs can have multiply PIs within the same lab – useful for center groups)
- *Manager* – aka. Lab Manager
- *Member* – aka. Resource User

You can also set start dates or expiration dates. Setting start and/or expiration dates can be useful, especially with student workers in a lab.

Then press the "Invite" button, and they are then added to the lab.

To edit their role, any dates set, etc., once added to the lab, click on the pencil icon next to their name.



If you click on the pencil icon, ✎ you can edit the membership role, start and end date, email and phone number, as well as make them a financial contact.

If you make a person a financial contact, you can then choose this person to be the primary contact for all approvals of the lab. Please see Group Settings below for more information on this.
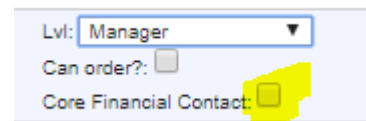


If you click the ✖ icon, this will remove the user from the lab.

**Please Note**: all expired users can be found by clicking on the "Show Expired Members" link towards the top of the page on the right side of the screen across from the "Lab members and settings" heading.

When you click on this link, it will show all expired members. If you would like to allow an expired member access to your lab again, you can do so by clicking on the pencil icon, and change the end date. Make sure to click "Save" for your changes to be saved.

Show expired memberships

# 3. <u>Budgets</u>

The budgets tab is just for your own lab internal use. It does not place any locks on fund numbers as it relates to users. You can utilize this feature to assist you in comparing expected spending on a project by either all members, or individual members of your lab.

Please note, this feature does not integrate with any center number, nor does it connect with the financial integration.

# 4. <u>Bulletin Board</u> – under the Bulletin Board Tab you can see the actions done with the lab.
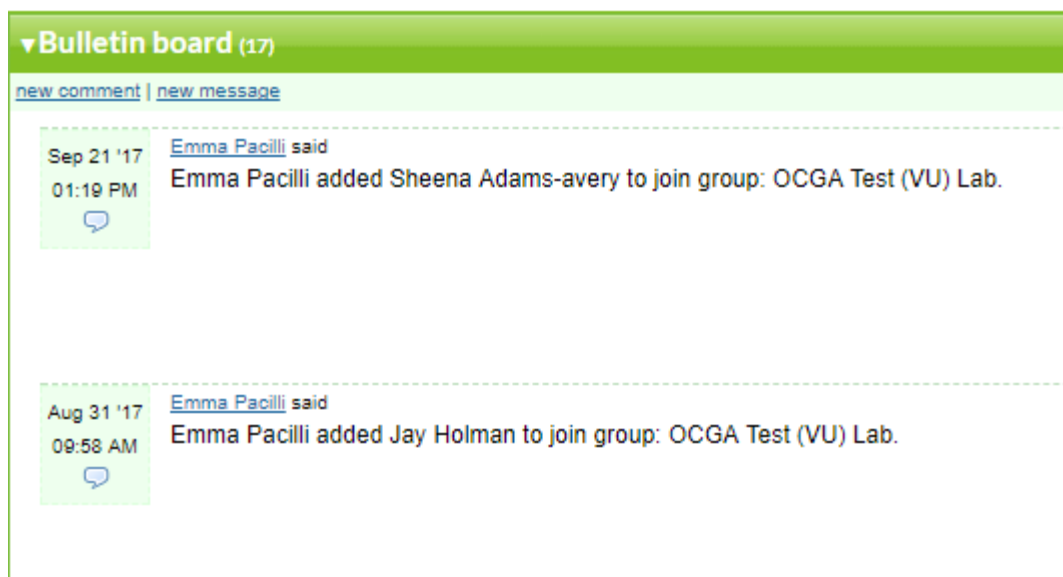


# 5. <u>Group Settings</u> – under the Group Settings Tab you can choose who should be the primary lab contact. The only names that will show in the drop down menu are the lab managers who have also had the box checked next to *Financial Contact* under their membership profile under the Members Tab, indicated by the $ icon next to their name.

# 6. View Requests Page

If you click on the *view requests* link in the left hand menu under the heading of *Core Facilities*, you will be taken to a new page. There are four tabs on this page.
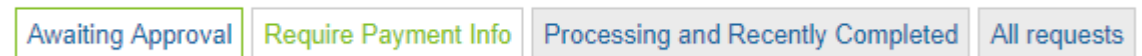


- **Awaiting Approval** – this tab will show requests of all your labs that require approval for requests from a core.

- **Require Payment Info** – this tab will show requests that still require payment information for all your labs.



The ⬛ icon is where you can click to chanage the payment information. The pencil indicates that the fund number is not valid, or the there is no fund number attached to the request. If the icon has a blue check mark a ⬛, then the payment number is valid. However, you can still click on the $ sign and edit the payment number, or split it amongst multiple fund numbers, as needed.

If you click on the blue arrow next to the request line, the request details can be seen.



Please note, service lines can continue to be added and billed on long term projects.

You will be able to see all forms, milestones, comments, attachments, quotes and charges for the service request/project. You can also send notes to the core about the project by clicking on the *add comment* link.

- **Processing and Recently Completed** – this tab will have all the requests that are currently being worked on by cores for all your labs, as well as recently completed requests.

- **All Requests** – this tab will have all requests for all your labs.

You can filter on each page to navigate through the requests.
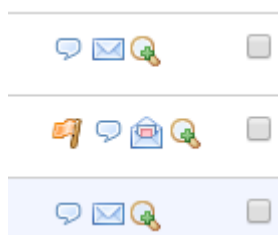


## 7. Invoices

If you click on the *invoices* link in the left hand menu under the heading of *Core Facilities*, you will be taken to a new page.

Here you can filter invoices, similar to the requests above. You can also view per-invoices, as well as final invoices, print PDFs, export invoice information out to a CSV spreadsheet. You can message the core, dispute charges, etc.



- The talk bubble icon allows you to leave a comment about the invoice for the core, or to receive on from the core.
- The magnifying glass will allow you to view the invoice.
- A yellow flag indicates something has been disputed on a Pre-Invoice that still needs to be resolved.

- A green flag indicates the dispute has been successfully resolved.

- If an invoice is in the Pre-Invoice phase, it will say it is a Pre-Invoice in the upper right hand corner. While it is still in this phase, you can still change the fund numbers by selecting the $ symbol, as explained in Section 4. You can flag it for disputes, and select a reason.

- Once the invoice is in the Final Invoice phase, which will be indicated in the upper right hand corner, any alterations to the invoice must be made through the core. You can use the message bubble to message the core directly.

## 8. Reporting

Reporting can be accessed either through the left hand menu by clicking on the *Reporting* link.

The reporting feature is very robust in iLab. To maximize the reporting feature, please watch the tutorial offered by iLab. iLab reporting tutorial

When you select the reporting link, you will be taken to the reporting page. There you can then run the reports on **Charges, Requests** and **Events** for all the labs in your department.
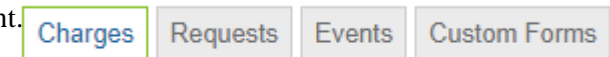


You can build a report, or modify a report, and then save it to run again every month. Should you wish to share that report, you can email it with other members of your lab directly from the reports page, as long as they are in the role of PI or Lab Manager. Lab Members cannot access reports.