

Department Managers iLab User Guide

VU and VUMC Users

iLab Site : <https://vanderbilt.corefacilities.org>

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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: All VUMC Departments will begin with “**VUMC -**” before the department name. When users from VUMC wish to utilize a VU Core, they must select their **(VU) Lab**, which resides in our institution. This allows VUMC users to access any scholarships, vouchers or subsidies available to them, as these are only available to internal users of an institution.

A request 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. Managing your Department Settings

Click on “My Departments,” and you will be brought to a page that lists all the labs in your department. If you are a Department Administrator for more than one department, then you will have more than one row in the table listed.

My departments

| name | groups | managers | actions |
|---|--|---|----------------------|
| 35100: OCGA Test Department | Admin (VU) Lab | Eden Wolff Wendy DeptAdmin | view |
| 18500 - Health Sciences Education: Office of the Dean | Molnar, Alejandro (VU) Lab Moro, Andrea (VU) Lab Non, Amy (VU) Lab Zimran, Ariell (VU) Lab | | view |
| 35100 - Office of Contract and Grant Accounting | Josh (VU) Lab Richard (VU) Lab Chazin, Walter (VU) Lab Dept (VU) Lab Fan, Yangin (VU) Lab Fesik, Stephen (VU) Lab Goodbred, Steven (VU) Lab Hiebert, Scott (VU) Lab Inagami, Tadashi (VU) Lab Li, Tong (VU) Lab Mernaugh, Raymond (VU) Lab Scott, Virginia (VU) Lab Tung, Tiffany (VU) Lab | Eden Wolff Wendy DeptAdmin | view |
| VULMMP Academic Institutions | | | view |

Name: This is the Department name, along with its department number.

Groups: This is a list of labs currently associated with your department. Labs are working groups, and usually will bear the name of the PI of the lab.

Managers: This is the current list of managers assigned to your department in iLab.

Actions: When you click on *view*, you will be able to make changes to your departments.

How to Alter Settings in the Department

1.1 - Name: If you need to make a change to your department name, please email coresvu@vanderbilt.edu to notify us that you are making this change, as it correlates with other files we maintain. We will make the change for you, and notify you once the change has been made.

For **VU Departments**, it will be your full Organization Name. *For Example: 35100 – Office of Contract and Grant Accounting*

For **VUMC Departments**, it will be **VUMC – Department Name**. *For Example: VUMC – Office of Research*

1.2 - Groups: If you click on one of the labs, you will be taken to that specific Lab’s landing page. Please refer to [Section 3: Managing a Lab in your Department](#).

1.3 - Managers: If you click on one of the managers, you will be taken to a new screen, which will allow you to do a few different things, depending on whether you clicked on your own name or another department manager's name within your department.

a. Your Name and Profile :

You will see a number of setting options when you click on your own name. Below is the screen you will be shown. For further explanation of this page, please see Section 4: Your iLab User Profile in [Setting Up a New iLab User Account Guide](#) for further instructions.

The screenshot shows the 'My Profile' page in the Agilent CrossLab system. On the left is a sidebar menu with options: Profile Details (selected), Change Password, Billing / Shipping Information, Notification Settings, Default Ordering Settings, Search Preferences, Projects, Labs (with a '1' badge), and Colleagues. The main content area is titled 'Profile Details for Peyton DeptAdmin' and includes an 'Edit' button and a heart icon. The profile information is as follows:

| Field | Value |
|--|----------------------------|
| Name | Peyton DeptAdmin |
| Title | |
| Email | peytondeptadmin@vu.edu |
| Phone | |
| Time Zone | Central Time (US & Canada) |
| Delimiter for Reporting CSV Export Files | , |

b. Another Department Manager's Name :

You will be taken to another screen that will show you minimal information about the manager who you selected. Please note, the request that they become a 'trusted colleague' function is in correlation to another module Vanderbilt does not use.

The screenshot shows the 'Profile Details' page for Emma Pacilli. The sidebar menu is the same as in the previous screenshot. The main content area is titled 'Profile Details for Emma Pacilli' and includes a heart icon. The page contains a section for adding Emma as a trusted colleague, with a custom note and a 'Add as trusted colleague' button. Below this is a table with Emma's profile information:

| Field | Value |
|--|----------------------------|
| Name | Emma Pacilli |
| Title | Administrator |
| Time Zone | Central Time (US & Canada) |
| Institute | Vanderbilt University |
| Delimiter for Reporting CSV Export Files | , |

1.4 - Actions: If you click on *view*, you will be taken to your department’s landing site. Here you can manage your department’s settings.

Department Name: 35100 - Office of Contract and Grant Accounting

GroupsMembersSettings

Manage administrator and staff access

Add additional members from your institution by searching for first and last name:
start typing the name of an

current managers and employees

1 Pending Lab Access Request

GroupsMembersSettings

| | | | |
|------------------|-----------------------------|----------------|--|
| Name | emma.pacilli@vanderbilt.edu | (615) 875-8154 | |
| Emma Pacilli | peytondeptadmin@vu.edu | | |
| Peyton DeptAdmin | | | |

1.4.1 – Groups Tab:

The Groups tab takes you to a page that allows you to access the labs within your department, as well as add new labs to your department.

Department Name: 35100 - Office of Contract and Grant Accounting

GroupsMembersSettings

| Group Name | Approval Amount | Primary Contact | Actions |
|---|-----------------|----------------------------------|---------|
| OCGA Test (VU) Lab | \$8,000.00 | Grace Researcher | |
| PI Sherry Test (VU) Lab | \$10,000.00 | | |

Search for a Group:

a. You can see the name of the lab.

| Group Name |
|------------------------------------|
| OCGA Test (VU) Lab |


b. The approval amount, which is the amount set as the limit for a single order before it requires financial approval, either by the PI or Lab Manager, or the Department Manager/Administrator, depending on the settings. The default for all labs within the institution is set to \$10,000.

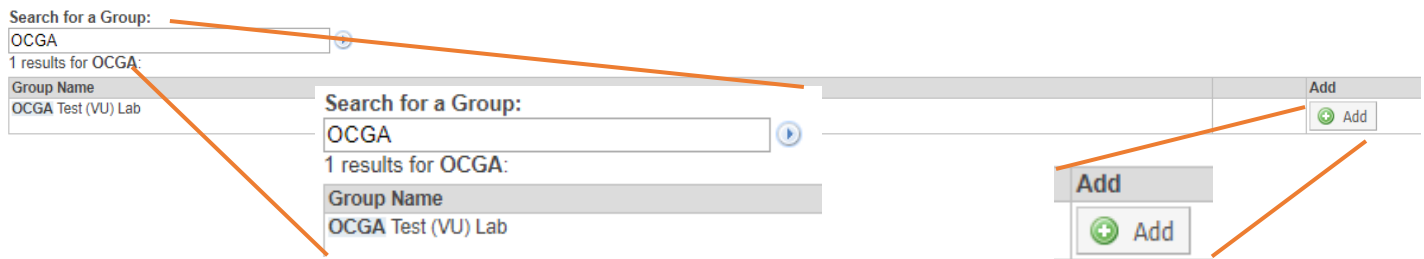
| Approval Amount |
|-----------------|
| \$10,000.00 |

c. The Primary Contact is the main contact for the Lab. This is usually the PI, but can also be a Lab Manager.

| Primary Contact |
|------------------------------|
| Emma Pacilli |

d. The removes the lab from your department, but does not delete the lab entirely from iLab.

- e. The “Search for a Group” text box is where you can type in the name of a lab to add to your department. Type in the last name of the PI, and then click the arrow button  to the right of the search box. Labs with that name will come up underneath, and you can click the **add** button to add the correct lab to your department.



1.4.2 – Members Tab:

The Members Tab is where you can add other users to be additional Department Managers/Administrators to your department, or remove users who no longer should have access to that role within your department.





Department Name: 35100 - Office of Contract and Grant Accounting

Groups **Members** Settings Billing Numbers Reporting

Manage administrator and staff access

Add additional members from your institution by searching for first and last name:
start typing the name of an

current managers and employees

| Name | | | |
|------------------|-----------------------------|----------------|---|
| Emma Pacilli | emma.pacilli@vanderbilt.edu | (615) 875-8154 |   |
| Peyton DeptAdmin | peytondeptadmin@vu.edu | |   |

- a. To add additional members, please start typing the name of the user which you would like to add in the search bar box under the “Add additional members” heading towards the top of the page, and then click the **Search** button. Once the correct user shows up, click the **Invite** button next to the name. Please note, the role will always be “financial_manager.” If the user does not come up, they most likely do not have an account, and must sign up for one. They can do this by following the instructions to set up a [new account](#).

Manage administrator and staff access


Add additional members:

1 results for sherry PI:

Name

Sherry PI

Invite

financial_manager 

- b. To remove a person from the department, you can click the **X** next to their name.



1.4.3 – Settings Tab:

The Settings Tab has a number of settings that relate to all of the labs in your department.

Department Name: 35100: OCGA Test Department

1 Pending Lab Access Request

Groups Members Settings

2 1

☐ Funds can be added to the department and then assigned to labs.

☒ Labs can be added to the department.

Default Lab Auto-Approval Threshold: 0

☐ Update all Default Auto-Approval Thresholds

Department Level Service Request Approval Threshold: 0

☐ Department managers receive emails when requests require approval.

☐ Only department managers should approve requests | ☐ Update all Default Auto-Approval Thresholds to Department Level Approval Threshold

☐ Department will receive lab access requests and rejections

☐ Only department managers will receive lab access requests and rejections

☐ Set department manager as primary contact for invoices

Save

For **VU Departments**, the second checkbox, *Labs can be added to the department*, must **ALWAYS** be checked. The first checkbox, *Funds can be added to the department and then assigned to labs*, should **NEVER** be checked.

For **VUMC Departments**, your department in our institution will begin with “**VUMC – Name of Department.**” In your settings, the first two check boxes, *Labs can be added to the department* and *Funds can be added to the department and then assigned to labs*, should **ALWAYS** be checked.

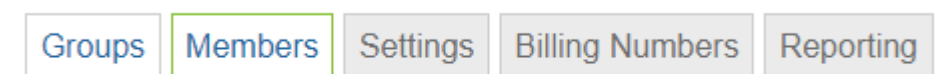
- The **Default Lab Auto-Approval Threshold** has an institutional default of \$10,000 per order, and can be altered for all the labs in your department here.
 - If you would like to update all lab thresholds that have been set that are within your department, instead of doing it manually by lab, select the check box below the default amount text box, which will override all thresholds of all individual labs.
 - For no change to the institutional default, the amount should be set to 0.
 - Please note, if you would like to set a default for a specific lab, you can do so on the lab’s landing page, which is explained in [Section 3](#).
- The **Department Level Service Request Approval**, has an institutional default of \$100 per service request, and can be altered for all the labs in your department 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.
 - Please note, if you would like to set a default for a specific lab, you can do so on the lab’s landing page, which is explained in [Section 3](#).
- Department managers receive emails when requests require approval** – if this is checked, all Department Managers/Administrators will be notified via email of financial approvals required for service requests made for all the labs in the department. Otherwise, all approvals will go to the lab’s primary contact only, which is the default setting.

- d. *Only department managers should approve requests* – if this is selected, all Department Managers/Administrators will be the only people who can approve requests for all the labs within the department.

If this is selected, you can then choose to override all lab thresholds within your department, for service requests. This checkbox specifically correlates with the *Department Level Service Request Approval* explained above.

- e. *Department will receive lab access requests and rejections* - if this is checked, all Department Managers/Administrators will be notified via email of any lab membership requests for all the labs in the department.
- f. *Only department managers will receive lab access requests and rejections* – if this is checked, all lab access request emails will only be sent to Department Managers/Administrators, and they will not be received by the Primary Contact of all the labs within the department.
- g. *Set department manager as primary contact for invoices* – if this is checked, the Department Managers/Administrators will be the primary contact for all invoices for all labs within the department. This applies to internal and external invoices.

The following two tabs (1.4.4 and 1.4.5) are for **VUMC Departments ONLY!**



- 1.4.4 – Billing Numbers (Center Numbers) Tab:** Please note, this is where you will manage the **center numbers** that belong to your department, and where you assign center numbers to labs.

Please see [Section 2b](#).

- 1.4.5 – Reporting Tab:**

Please see [Section 6](#).

2. **Adding Billing Numbers to Labs in your Department**

How a Billing Number is added to a lab by a Department Manager will be dependent upon whether it is a VU department, which will be using COAs and POETs, or a VUMC department, which will still be using their 10-digit center number. Please go to the relevant section that pertains to your department.

These instructions have no bearing on COAs and POETs or Center Numbers that are utilized with VUMC Cores, and will only be available for use with VU Cores in iLab. To have those added for use with VUMC Cores in iLab, please contact the Office of Research and follow their instructions for this process.

Section 2a : [VU Departments – COAs and POETs](#)

Section 2a.2 : [Pulling forward a COA to a Lab](#)

Section 2a.3 : [Pulling forward a POET to a Lab](#)

Section 2a.4: [Disable/Enable COAs and POETs Added to a Lab](#)

Section 2b : [VUMC Departments – Center Numbers](#)

Section 2a. VU Departments – COAs and POETs

Vanderbilt has now transitioned to its new general ledger, Oracle Cloud, and our full financial integration with iLab will be up and running. Below are instructions on how to pull forward a COA or POET billing number into a lab. In [Section 3: Managing a Lab in your Department](#), you will find more detailed instructions on how to give a member of the lab access to a billing number.

Section 2a.1 How to pull forward a COA or POET in a Lab - Introduction

To add a COA or POET to a lab in your department, you must “pull” the COA or POET strain forward by attaching it directly to the lab within your department. You will only be able to pull forward COAs and POETs that are valid. Please note, the Program and Activity segments of the COA are dependent upon each division.

To pull forward a COA or POET to a lab, you will need to go to the specific lab directly. A list of labs that are in your department is available in the **Group** tab in your department.

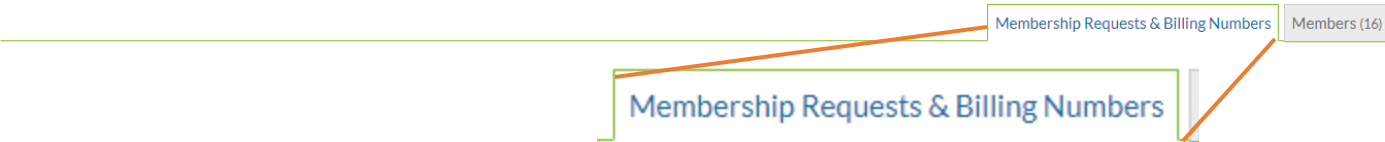
Department Name: 35100: OCGA Test Department



Please click on the name of the lab (group name) that you would like to link a COA or POET to.

Once you are in the respective lab, click on the **Membership Requests & Billing Numbers** tab.

OCGA Test (VU) Lab



Once on this tab, under the **Manage Billing Numbers** section, you can give users in the lab access to billing numbers already linked to the lab (see [Section 3](#)), you can add billing numbers (COAs and POETs) to the lab, and you can disable and enable billing numbers (COAs and POETs) that have already been added to the lab. Please see [Section 3a](#) for further information on how to do this.

If the COA and/or POET needs to be added to another lab that does not “live” in your department, a Department Manager responsible for that lab will need to do this.

Manage Billing Numbers

Customize Billing Number Grid

Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

Filter Billing Number numbers

Filter Members

| Name | Default Billing Number | 350.05.35100.6745.000.000.000.0.0 | | | | CR_350001.01 - General | S- Scholarship Test 1- 1831391 (25,000.00) |
|------------------|------------------------|-----------------------------------|--|--|--|---------------------------|--|
| | | | | | | | |
| Emma Pacilli | None | <input type="checkbox"/> | | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Kim Test | None | <input type="checkbox"/> | | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Grace Researcher | None | <input type="checkbox"/> | | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

Section 2a.2 Adding a COA to a Lab via “Request access to additional Billing Numbers”

The COA will be shown as a strain separated by periods within iLab. Example: 125.05.12520.6745.000.000.000.0.0

You will need to enter all of the COA into the search bar to pull the COA into the lab – the entity, **net asset class**, financial unit, **account**, **program**, **activity**, interentity, future 1 and future 2.

The **Net Asset Class** segment must be **05**, otherwise you must use the corresponding POET.

The **Account** segment, when using a VU Core, will always be **6745**, unless you are purchasing a Fabricated Equipment or Capital Equipment Item. For Fabricated Equipment, **1740** must be utilized. For a Capital Equipment, **1750** must be utilized.

The **Program** and **Activity** segments are defined by the Divisions and/or departments, please ensure this is correct. Once a COA is added to a lab, it can only be disabled, not deleted. You will need to add the COA for each iteration required (i.e., if you need more than one COA with a different program, activity or account number).

▼ Request access to additional Billing Numbers

🔍 If you don't see a Billing Number that you should have access to, please select the type to add and then type it in below.
The Billing Number will be added to the lab.

Request a COA

Request a POET

| Entity | Net Asset Class | Financial Unit | Account | Program | Activity | Interentity | Future 1 | Future 2 |
|--|-----------------|----------------|---------|---------|----------|-------------|----------|----------|
| 000 | 05 | 00000 | 6745 | 000 | 000 | 000 | 0 | 0 |
| <input type="button" value="Request"/> | | | | | | | | |

Once you have entered the segments for that COA, you will then be able to add the COA strain to the lab by pressing the **Request** button. The PI will not be given access to the COA automatically, so it is very important that the Department Manager give the PI access to the COA after adding it to the lab.

You will be able to see your requests below. You can archive a request once it has been successfully processed by clicking on the **Archive Request** icon. This only removes the request information from the list. It does not remove the COA, nor does it disable the COA. To disable the COA, please see [Section 2a.4](#).

Your COA/POET requests:

| COA/POET | Requested on | Status | Owned by | Resolved on | Resolved by | Notes by Fund Owner | Archive request |
|-----------------------------------|--------------|----------|----------|-------------|-------------|---------------------|-----------------|
| CR_350002.01 | Jan 12 '18 | approved | | Jan 12 '18 | Eden Wolff | | |
| 125.05.12520.6745.100.100.000.0.0 | Jan 12 '18 | approved | | Jan 12 '18 | Eden Wolff | | |

Section 2a.3 Adding a POET to a Lab via “Request access to additional Billing Numbers”

The POET will be shown as a strain separated by periods within iLab. Example: AA_XXXXXX.XX or XXXXXX.XX

The POET will be pulled in using only the Project Number and Task Number segments. The Organization Name and Expenditure Type segments will reside on the back end of the system for output into our billing files, but will not be needed when pulling it forward to a lab, nor will it be shown in the dropdown menu of fund numbers for the lab.

▼ Request access to additional Billing Numbers

🔍 If you don't see a Billing Number that you should have access to, please select the type to add and then type it in below.
The Billing Number will be added to the lab.

Request a COA

Request a POET


| Project ID | Task Number |
|--|-------------|
| CR_350001 | 01 |
| <input type="button" value="Request"/> | |

Once you have entered the Project Number and Task Number segments of the POET, you will then be able to add the POET to the lab by pressing the **Request** button.

The PI will not be given access to the POET automatically, so it is very important that the Department Manager give the PI access to the POET after adding it to the lab. Please see [Section 3a](#) for further information on how to do this.

You will be able to see your requests below. You can archive a request once it has been successfully processed by clicking on the **Archive Request** icon. This only removes the request information from the list. It does not remove the POET, nor does it disable the POET. To disable the COA, please see [Section 2a.4](#).


Your COA/POET requests:


| COA/POET | Requested on | Status | Owned by | Resolved on | Resolved by | Notes by Fund Owner | Archive request |
|-----------------------------------|--------------|----------|----------|-------------|----------------------------|---------------------|---|
| CR_350002.01 | Jan 12 '18 | approved | | Jan 12 '18 | Eden Wolff | |  |
| 125.05.12520.6745.100.100.000.0.0 | Jan 12 '18 | approved | | Jan 12 '18 | Eden Wolff | |  |

Section 2a.4 Disable/Enable Billing Numbers Added to a Lab

COAs and POETs added to the lab cannot be deleted, but they can be disabled so that they no longer appear in the COA/POET grid in the lab. They can also be enabled again, if they need to be accessible to the lab again and were previously disabled.

▼ Disable/Enable Billing Numbers

 The list of these COA/POETs are received automatically from your institution's financial system. If you have any COA/POETs that are not used, please uncheck those below. Selected ones are displayed and usable in the grid above by your researchers.

 Please note, when you uncheck a specific COA/POET, users will NOT be able to use it and any active charges that have not been billed will be considered invalid. If you think a COA/POET should not be in your lab permanently, please contact your institution administration.

[select all](#) | [select none](#)

- | | | | | |
|--|--|---|---|---|
| <input type="checkbox"/> 100.05.10000.1740...000.0.0.Office of the Chancellor | <input type="checkbox"/> 150.05.15220.1740...000.0.0.Chemical and Molecular Engineering | <input checked="" type="checkbox"/> 210.05.21000.1750...000.0.0.Peabody College: Office of the Dean | <input checked="" type="checkbox"/> 310.05.31120.6745...000.0.0.Scholarly Resources | <input checked="" type="checkbox"/> 380.05.38600.1740...000.0.0.Payroll |
| <input checked="" type="checkbox"/> 100.05.10000.1750...000.0.0.Office of the Chancellor | <input checked="" type="checkbox"/> 150.05.15220.1750...000.0.0.Chemical and Molecular Engineering | <input checked="" type="checkbox"/> 210.05.21000.6745...000.0.0.Peabody College: Office of the Dean | <input checked="" type="checkbox"/> 310.05.31130.1740...000.0.0.Special Collections | <input checked="" type="checkbox"/> 380.05.38600.1750...000.0.0.Payroll |
| | | | | <input checked="" type="checkbox"/> 380.05.38600.6745...000.0.0.Payroll |
| | | | | <input checked="" type="checkbox"/> 380.05.38700.1740...000.0.0.Recruitment |

To disable a COA or POET within the lab, just deselect the checkbox next to the COA or POET. If you wish to enable the COA or POET again, check the box.

Section 2b. VUMC Departments - Center Numbers

When you log into iLab and go to “My Departments,” you will see the **Billing Numbers** tab in the right hand corner below the search bar. Though this says Billing Numbers, VUMC will still be utilizing their 10-digit center numbers.

Department Name: 35100 - Office of Contract and Grant Accounting

| Name | Description | Owner | Status | Total amount | Expires | Assign | Actions |
|------------|---------------------|--|--------|---------------|------------|--------------------|---------|
| 1551156789 | Test Name of Center | 35100 - Office of Contract and Grant Accounting (808670) | Active | click to edit | Jul 26 '18 | OCGA Test (VU) Lab | |
| 1551150300 | Test 300 | 35100 - Office of Contract and Grant Accounting (808670) | Active | click to edit | May 24 '18 | | |

This is where you assign center numbers to a PI's Lab. You can only assign billing numbers to a PI that has a Lab. If they do not have a lab, you must have the PI create an account with iLab. The instructions are:

- **Principal Investigators:** You can set-up your user account using your VUNet ID and password by going directly to [iLab](#). Please look for your lab within the list. Your lab will be identifiable by your last name, first name. If you cannot find your lab, please select the **PI Placeholder (VU) Lab** and then fill out the [Principal Investigator](#) form to have the lab added to iLab and your department. We will notify you once your lab has been created within iLab and is ready for you to use.

Section 2.1 To Add a Billing Number to your Department

Please make sure you **double-check** the billing number when adding a new one, because iLab does not technically delete a billing number from its history. If you remove a billing number, it will only go to inactive status, which will result in a much longer list.

If you click on “Add a New Billing Number,” you can enter the information as follows:

Number *

Name *

Amount

Status active

Expires On

Submit

Number (required): is the actual billing number

Name (required): is the description of the billing number.

Amount: is the spending limit for the billing number. Please note, currently this limit will be for the billing number as a whole, not per lab assigned. Therefore, if you add multiple labs, the amount entered here will be the cap for all labs combined, not each individual lab.

Status: Please make sure this is on 'Active'




Expires On: If you would like an expiration date, it should go here.

Section 2.2 To Assign a Lab to a Billing Number

PLEASE NOTE – **billing numbers can now be assigned to more than one PI.**

You will see a text box under the “Assign” column. Please enter the lab you would like to assign there.

Displaying 30 out of 30 results. (Page 1 of 1)


| Name | Description | Owner | Status | Total amount | Expires | Assign | Actions |
|------------|---------------------|--|--------|---------------|------------|--|---|
| 1551156789 | Test Name of Center | 35100 - Office of Contract and Grant Accounting (808670) | Active | click to edit | Jul 26 '18 | <div>Start typing a lab to assign to</div> |    |

If searching for a PI’s lab, please use their last name.

AssignActions

ocga

OCGA Test (VU) Lab

When you click on the correct lab, it will add the billing number to the lab.

AssignActions

×

 OCGA Test (VU) Lab

You can continue to add the necessary labs in this field box if more than one PI is associated with the billing number.

Icons next to “Assign” Field Box




The *mini bar graph* is for high level reporting. It will show you how much each lab has spent at each core, and shows only recent expenditures.

ExpiresAssignActions

click to edit

×

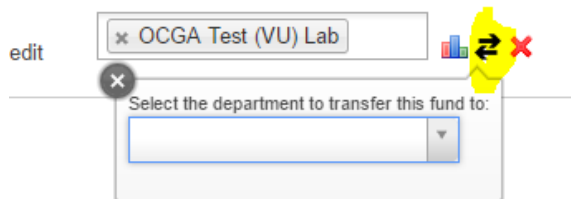
 OCGA Test (VU) Lab

×

| Lab | Amount Spent (Core) | Total Amount Spent |
|-----|-----------------------|--------------------|
|-----|-----------------------|--------------------|

The two black arrows allow you to transfer the billing number to another VU Department.

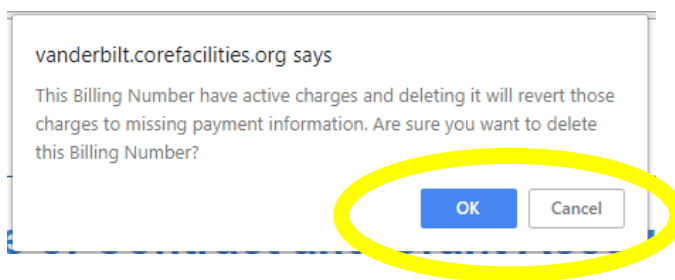


The red X allows you to inactivate a billing number.



You will be shown a pop up window checking you are certain you want to inactivate the billing number.

If you are certain, press **OK**.



Please Remember – when center numbers are added to a lab, ONLY the PI will have access to the billing number. The Lab Manager and Resource Users will not automatically be given privileges to the billing number. The PI, Lab Manager, or Department Manager must go into the lab, go to “**Membership Requests & Billing Numbers**” tab, and check who they would like to have access to each billing number assigned to the lab. Please see [Section 3](#) for further guidance.

3. Managing a Lab in your Department

Each lab in your department has its own landing page.

AAA Default (VU) Lab

2 Membership Requests & Billing Numbers

Members (30)

Budgets

Bulletin board (4)

Group Settings

2 Membership Requests & Billing Numbers

Members (30)

Budgets

Bulletin board (4)

Group Settings

- a. **Membership Requests & Billing Numbers** – Under this tab, you can manage all lab membership requests, as well as assign which members have access to each billing number. Billing numbers consist of COAs, POETs, VUMC Center Numbers, Scholarship Fund Numbers and Vouchers. Department Managers, PIs and Lab Managers can approve membership access requests to the lab, and assign billing number access for each member in the lab.

No user role in the lab is given automatic access to a COA or POET. Access must be given to all users in the lab utilizing the COAs/POETs grid under the *Customize Billing Numbers Grid*.

Any scholarships or vouchers that have been awarded to the PI will show up here. Scholarships will remain **S** billing numbers, and Vouchers will remain **V** billing numbers. These numbers WILL NOT correspond with what was in CORES.

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.

You can filter the grid by entering the Billing Number in the top search field box, and/or the lab member’s name in the second search field box. When you check a box in the grid, it will turn green the first time to show you that the change has been saved.

Manage Billing Numbers

▼ Customize Billing Number Grid

Select Billing Numbers to display in the grid. Saving empty selection would display all available Billing Numbers in the grid.

Please choose Billing Numbers to display in grid ...

Clear AllCancelSave

Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

1Filter Billing Number numbers

2Filter Members

| Name | Default Billing Number | 350.05.35100.6745.000.000.000.0.0 | CR_350001.01 - General | S- Scholarship Test 1- 1831391 (25,000.00) |
|------------------|------------------------|-------------------------------------|-------------------------------------|--|
| Emma Pacilli | None | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Kim Test | None | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Grace Researcher | None | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

You can see more detailed information about the COA or POET by hovering over the billing number in the Grid.

If you hover over the COA number, the Financial Unit Name will appear.

125.05.12520.6745.100.100.000.0.0.Chemistry

Chemistry

If you hover of the POET, the organization name, the task name, and the expiration date in Oracle will be displayed. If there is a spending cap, that will be shown here as well.

CR_12560_PHYSICS MACHINE SHOP CR_350001.01
General 745.000.000.000.0.0 - General
Expires on June 30, 2099

If it is a scholarship or voucher number, you will be able to see the scholarship or voucher name, the core the scholarship or voucher is for, and the expiration date within the hover. You will also be able to see the remaining balance under the scholarship or voucher name in the grid.

Fund Name: Testing Core Scholarship 1
From Core: VU Testing Core
Warning: this has expired!
CR_350001.01
000.0.0 - General
Expired on: May 31, 2018

S-
Scholarship
Test 1-
1831391
(25,000.00)

You will also be able to manage lab membership requests here. If there is a red number on the tab, which indicates that there is a membership request. You can accept or reject the request here.

2 Membership Requests & Billing Numbers

Members (5)

Bu

Membership Requests

⚠ An Access Request requires approval

| Date | Name | Email | Actions |
|--------------|--------------|-----------------------------|--|
| ⚠ Sep 12 '17 | Emma Pacilli | emma.pacilli@vanderbilt.edu | <input checked="" type="checkbox"/> Accept <input type="checkbox"/> Reject |

This can also be done in the department page. A tab will appear in the department landing page if there are any **Pending Lab Access Requests**. Here you can accept, reject or change lab. If you select **Change Lab**, this does not automatically accept the user into the lab. It just transfers the lab access request to the new lab.

Department Name: 35100: OCGA Test Department

⚠ 1 Pending Lab Access Request

Groups

Merr

⚠ 1 Pending Lab Access Request

Admin (VU) Lab

| Date | Name | Email | Actions |
|--------------|--------------|-----------------------------|--|
| ⚠ Sep 12 '17 | Emma Pacilli | emma.pacilli@vanderbilt.edu | <input checked="" type="checkbox"/> Accept <input type="checkbox"/> Reject <input type="button" value="Change lab"/> |



- b. **Members** – Under this tab, you can set the lab thresholds, as well as manage lab memberships.


OCGA Test (VU) Lab

[Membership Requests & Center Numbers](#)
[Members \(28\)](#)
[Bulletin board \(17\)](#)
[Group Settings](#)

Lab-wide approval settings
















Click the pencil icon next to the person below whom you would like to make the financial approver.

Default auto-approval threshold: \$ 10000.0 
 Cost overage buffer: \$ 100 

 save approval settings































Lab members and settings

[Show expired memberships](#)

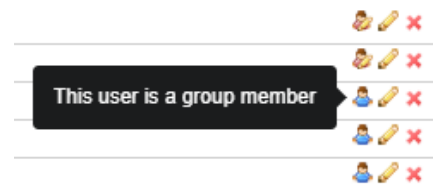
| Name | Auto Approval Amount | ERP ID | Email | Phone | Start Date | End Date | |
|------------------|---------------------------|--------|--|----------------|------------|----------|---|
| Emma Pacilli | Lab default (\$10,000.00) | | emma.pacilli@vanderbilt.edu | (615) 875-8154 | | |      |
| Sherry Pi | Lab default (\$10,000.00) | | sherrypi@vu.edu | | | |      |
| Grace Researcher | Lab default (\$10,000.00) | | stefanie.dunneagan+9090@labsolutions.com | 6143221572 | | |      |

- **Lab-wide approval Settings** – here you can set the *Default auto-approval threshold* and the *Cost overage buffer*. These settings apply to the specific lab only. For further information about these thresholds, please refer to [Section 1.4.3](#).
- **Lab members and settings**- here you can add an iLab 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 their membership has been expired, and remove members from the lab.

[Show expired memberships](#)

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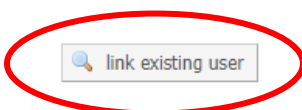
To know which role a member has, hover over the people icon.



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 |
| Peyton DeptAdmin | peytondeptadmin@vu.edu | |

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 trying to add a person who is from VUMC. If this is the case, please 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. The user must have a lab account set up with a VUMC lab first.

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.

| | | | | | | |
|------------------------|---------------------------|--|------------|--|--|--|
| Core Financial Manager | Lab default (\$10,000.00) | cfm@vu.edu | | | | |
| Core Manager | Lab default (\$10,000.00) | cmgr@vu.edu | | | | |
| Core Member | Lab default (\$10,000.00) | cmem@vu.edu | | | | |
| Gemma Researcher | Lab default (\$10,000.00) | shelbi.lee+12345@ilabsolutions.com | 5555555555 | | | |
| Grace Researcher | Lab default (\$10,000.00) | stefanie.dunnegan+9090@ilabsolutions.com | 6143221572 | | | |

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](#)

- c. **Bulletin Board** – under the Bulletin Board Tab you can see the actions done with the lab.

▼Bulletin board (17)

[new comment](#) | [new message](#)

Sep 21 '17
01:19 PM


[Emma Pacilli](#) said
Emma Pacilli added Sheena Adams-avery to join group: OCGA Test (VU) Lab.

Aug 31 '17
09:58 AM

[Emma Pacilli](#) said
Emma Pacilli added Jay Holman to join group: OCGA Test (VU) Lab.

Aug 31 '17
09:57 AM

[Emma Pacilli](#) said
Emma Pacilli added Jody May to join group: OCGA Test (VU) Lab.

- d. **Group Settings** – 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.

General Lab Information

[add to my favorites](#) | [edit](#)

Name: OCGA Test (VU) Lab
My relationship: member

Communication Settings

Lab Primary Contact: Emma Pacilli ▼
Emma Pacilli
Sherry PI

Invoice Print Preference

☐ Receive physical copy of invoice

Save preference

4. 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

Require Payment Info

Processing and Recently Completed

All requests

- **Awaiting Approval** – this tab will show requests of all the labs within your department that require approval for requests from a core.
- **Require Payment Info** – this tab will show requests that still require payment information for all the labs within your department.

| date | for | service id | status | cost | |
|-------------------------|------------------------------------|----------------|------------|--------------------|--|
| Jul 10 (Jul 10 2017) | Core Manager OCGA Test (VU) Lab | C(DEMO)-CM-242 | Processing | \$0.00 (\$2.00) | |

The icon is where you can click to change 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 , 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.

Sep 21
(Sep 21 2017)

Grace Researcher
OCGA Test (VU) Lab

CIT-GR-17

Waiting for Core to Begin

\$3,870.75
(\$0.00)
Stacy Sherrod

Overview

Payment Information

Forms and Request Details

View Form

MS Based Omics Form

In Progress

Events:

| Resource | Start time | End time | Total duration | Expected cost |
|---|--------------|--------------|----------------|---------------|
| Data Analysis Workstation 1 (Progenesis Q1 - 1) (Data Analysis Workstation 1) | 21 Sep 10 25 | 23 Sep 11 25 | 49.0 hours | \$0.00 |
| High Resolution Mass Spectrometer (Thermo QE-HF) (High Resolution Mass Spectrometer Thermo QE-HF) | 21 Sep 10 25 | 23 Sep 11 25 | 49.0 hours | \$0.00 |
| Randi Grant-Branum (Randi Grant-Branum Calendar) | 21 Sep 10 25 | 23 Sep 11 25 | 49.0 hours | \$911.90 |
| Simona Codreanu (Simona Codreanu Calendar) | 21 Sep 10 25 | 23 Sep 11 25 | 49.0 hours | \$911.90 |
| Total: | | | | \$1,823.80 |

Comments

add comment

Attachments & URLs

add attachment

add url

Billing Information

edit

Shipping Information

edit

Please fill out any forms that are highlighted in red.

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 the labs within your department, as well as recently completed requests.
- **All Requests** – this tab will have all requests for all the labs within your department, including old completed projects.

You can filter on each page to navigate through the requests, invoices, in people search, etc.

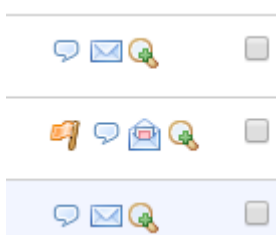
◀ Hide Filters

| |
|--|
| ▼ Keywords |
| <input type="text"/> <input type="button" value="Go"/> |
| ▼ Status |
| <input type="checkbox"/> Completed (42) |
| <input type="checkbox"/> Financials Approved (9) |
| <input type="checkbox"/> Processing (44) |
| ▶ Category |
| ▶ Labels |
| ▶ Assigned To |
| ▶ Lab |
| ▶ Owner |
| ▶ Core |
| ▶ Institution |
| ▶ Center Number |
| ▶ Payment Method |
| ▶ Request Date |
| ▶ Start Date |
| ▶ Due Date |
| ▶ Completed Date |
| <input checked="" type="checkbox"/> Apply Filters |
| <input checked="" type="checkbox"/> Reset Filters |

5. 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 pre-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 one 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.

6. Reporting

Reporting can be accessed either through the left hand menu by clicking on the *Reporting* link, or by clicking on the *Reporting* tab on the department landing page.

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 tab, you will only be able to run reports on **charges**. If you go to the link from the left hand menu, 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 department directly from the reports page.