

iLab Solutions: Core Facilities Institution Administrator Help Manual

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Table of Contents

[Click on the title to navigate to that section of the document.](#)

1. Overview	3
2. My Homepage	4
3. How do I manage institution related information?	8
a. List of Cores and Core Statistics	8
b. Institution and Lab Memberships and Settings	10
How do I Add and Manage Departments?	11
How do I Address Lab Memberships with ID Authentication and Integrations?	11
How do I view, add and manage research groups in iLab?	11
How can I view and add institution administrators?	14
Can I add partner institutions and what does that do for my users?	15
What Institution Settings can I manage?	16
Charge Justifications: How do I require justifications for Not Billable, Pro Bono, No Charge and Flex Charges?	20
c. What reporting features do I have access to, so I can run usage reports?	27
d. Can I review Invoices and Billing Events within iLab?	27
Can I view all facility invoices in one location?	27
How is a billing event created and managed?	28
4. Can I track iLab support issues brought up by institution members?	29

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Overview

As an institution administrator you will be able to manage labs, view settings, view billing events and run reports in iLab. This manual can be used as a resource to the general tools you have as an institution administrator. Some features described in this document may not be available depending on how the iLab system was set up for your institution.

If you experience any problems or have any questions using iLab, do not hesitate to click the *leave iLab feedback* link in the upper right hand corner once you are logged in. Alternatively, send an email to support@ilabsolutions.com with your question or visit ilabsolutions.com for a live chat with our support staff.

iLab practices continual deployment of new features to meet all of our customers' needs to the best of our ability. Because of this, there may be some features that you see in our system that have not been updated in this document.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

My Homepage

When you first log into iLab make sure you update your time zone by choosing your correct time zone and then clicking on *Update my time zone*. After you update your time zone, you will either land on the core's page you logged into or you may land on your homepage (*Figure 1*). On your homepage you can view quick links to facilities you often use, view requests that require your attention and view a list of your reservations. You have menu options to manage your account, manage your support tickets and find lists of cores that you can access through iLab when you are on any page in iLab.

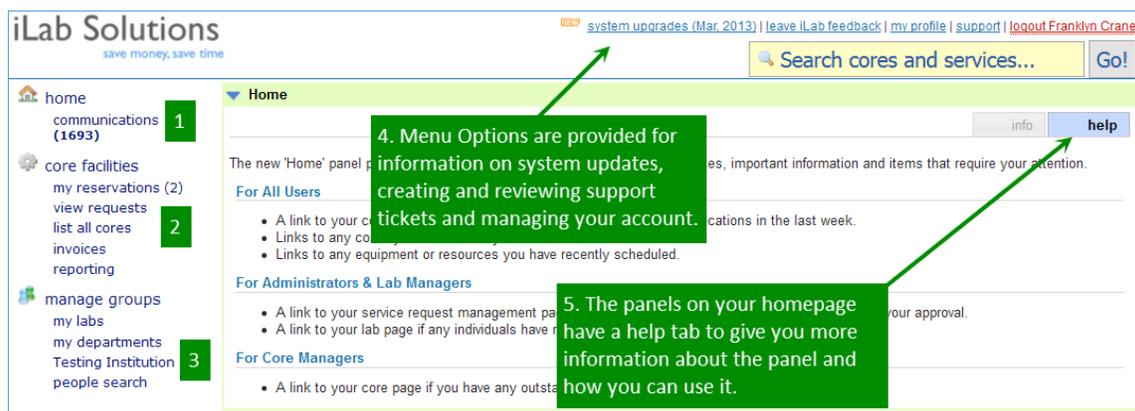


Figure 1. Your Homepage

The *home* menu option on the left side of the page (*Figure 1.1*) will take you to your homepage and homepage panels. Under *home* is the *Communications* menu option where you can view emails sent through the iLab system. If your lab also utilizes the iLab Lab Ordering Management system, you will see menu options on the left side of the page for requisitioning.

Under *core facilities* (*Figure 1.2*) you may see *my reservations* where you can view past and future reservations you have with cores. Under the *view requests* link you can see all requests made by members of your labs, including ones that require your approval or payment information. You can see a list of core facilities that you can access from *list all cores*. Depending on your institution's settings, you may be able to click on *invoices* to view and approve all invoices regarding charges for any member of your lab. To run reports on facility usage and lab spending, click on the *reporting* option. For more information about reporting, please [click here](#).

Under *manage groups* (*Figure 1.3*) you can view *my labs* to see details about your lab and lab members. You may see my departments or the institution name depending on your access level. More information about these links can be found in this

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

document. Lastly, you can click on *people search* to search for any user that belongs to your institution or uses your institution's facilities.

In iLab you will always see menu options at the upper-right hand corner and on the left panel (*Figure 1.4*). The options at the upper-right hand corner are directly related to your account.

1. *system upgrades*, is where you can view new features that will be added to the iLab system
2. *leave iLab feedback* button is where you can leave a support ticket for iLab to review
3. *support* button will show you a history of all of your support tickets
4. *my profile* option is where you can edit your account
 - a. You can update your name, time zone, password and contact information. You will need to contact support@ilabsolutions.com if you need to update your login ID.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Your *homepage* will have panels with different kinds of information. Each panel will have a *help* tab (*Figure 1.5*) with more instructions on the information seen in the panel and an *info* tab with information and quick links to resources that apply to you.

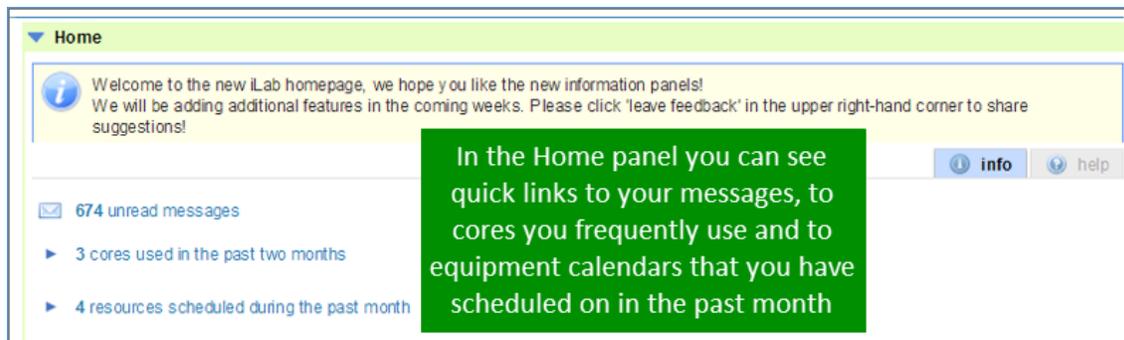


Figure 2. On the *homepage* you will see the *Home* panel that will have quick links to cores you use.

Under the *Home* panel you may see a *Service Request* panel. This panel will have any requests that require your attention in the *alerts* tab (*Figure 2.1*). Requests that require attention could be ones that require your approval, ones that are missing payment information or ones that you have not submitted to the core. Lab heads will see requests from all of their lab members and for themselves that require approval in the *Service Request* panel.

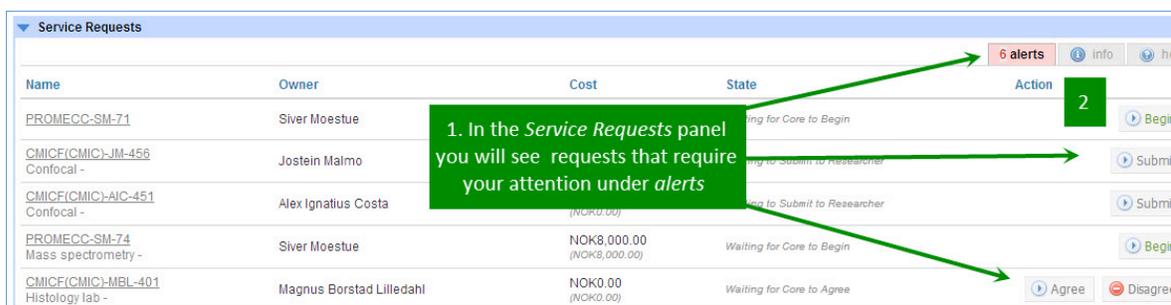


Figure 3. Under the *Service Request* Panel you will see requests that require your attention under alerts.

Under the *info* tab you will see up to twenty of your most recent requests (*Figure 3.2*).

You may also see a *Scheduled Events* panel that will show any of your reservations that are still pending core approval in the *alerts* tab (*Figure 4.1*), and your future reservations, up to fifteen, in the *info* tab (*Figure 4.2*).

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014



Equipment	Owner	When	For How Long	Status	Actions
7T Bruker Biospec MR scanner 7T	[Owner Name]	Fri, Mar 01 at 08:00 AM	840 minutes	valid	<input type="button" value="Cancel"/> <input type="button" value="Delete"/>
Transmission Electron Microscope (TEM), JEM 1011 TEM, JEM 1011	[Owner Name]	Fri, Mar 01 at 08:15 AM	375 minutes	valid	<input type="button" value="Cancel"/> <input type="button" value="Delete"/>
Zeiss LSM 510 Meta Live Zeiss LSM 510 Meta Live	[Owner Name]	Fri, Mar 01 at 09:00 AM	120 minutes	valid	<input type="button" value="Cancel"/> <input type="button" value="Delete"/>

Figure 4. See reservations that are pending approval and your future reservations in the *Scheduled Events* panel.

Please [click here](#) to see our general use manual.

As an institution administrator, you may also be listed as an administrator for core facilities at the institution. If you are, you will see under the *Service Requests* panel and *Schedule Events* panel requests and reservations that are for the core staff to manage. Please [click here](#) for our core staff help manuals.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

How do I manage institution related information?

List of Cores and Core Statistics

On the left side of the iLab page there is a list of options (Figure 5). Under *manage groups* you will see the name of your institution. Click on the name of your institution to access functionality to manage the Institution's information and settings in iLab.

Testing Institution
When you first land on the institutions page, you will see a list of all institution cores and their statistics.

Statistics from all live cores at a glance for the last 12 months

4 cores	1 live 3 dev	90 offerings	45 svc 45 equip	4 users	3 int 1 ext	USD 6.4k revenue	6.1k int 305.0 ext
---------	-----------------	--------------	--------------------	---------	----------------	---------------------	-----------------------

Core Name (show/hide payment configuration)	Primary Contacts	Live?	Public?	Days since last billing	Recent Requests
iLab Repository Core	Herbert Snider	yes	yes	∞	3
Bioinformatics Core	Rosemary Emard	no	yes		
Bioexpression and Fermentation Facility	Carissa Gorczany	no	no		
For Demonstration Only - Biology Core	Clifton Collins	no	no		

Figure 5. After you click on the institution name on the left panel, then you can manage different aspects of your institutions set-up on the Institution page.

When you first land on the institution's page, you will see a list of institution core facilities and their general statistics. In the core list table, you can see statistics on:

1. List of all cores
2. The core head or contact
3. If the core's page is live in the system
4. If the core is open to the public or requires core access requests
5. The last day of billing
6. The number of recent core service requests

Above the table you can see overall statistics on:

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

1. The number of cores total
2. The number of cores live in our system versus the number of cores still in development
3. The total number of services and resources that the cores offer
4. The break down of the number of services and equipment (schedules) offered from all of the cores
5. The total number of users using iLab to order from facilities
6. A breakdown of users by type, like internal and external
7. Total revenue for all cores and a breakdown of revenue for internal versus external customers
8. The total number of services requests
9. A breakdown of requests for different user types like internal and external
10. Number of hours scheduled
11. A breakdown of scheduled events by reservation or maintenance

Also on the core's page you can view the payment settings for each core. The core facilities can determine if they require payment information and at what point. You can view what the core has set up if you click on *show/hide payment configuration* (Figure 6).

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Click *show/hide payment configuration* to see payment settings for institution core facilities.

Viewing at a glance for the last 12 months

90 bookings | 45 svc 45 equip | 4 users | 3 int 1 ext | USD 6.4k revenue | 6.1k int 305.0 ext

Core Name (show/hide payment configuration)	Primary Contacts	Live?	Public?	Requiring payment information?						Days since last billing	Recent Requests
				On internal schedule?	On internal initiate?	On internal agree?	On external schedule?	On external initiate?	On external agree?		
iLab Repository Core - Standard Biobanks Testing	Herbert Snider	yes	yes	no	no	no	no	no	no	∞	3
Bioinformatics	Rosemary Emard	no	yes	no	no	yes	no	yes	yes		
Bioexpression and Fermentation Facility	Carissa Gorczany	no	no	no	no	yes	no	no	yes		
For Demonstration Only - Biology Core	Clifton Collins	no	no	no	yes	yes	no	no	no		

©2006 – 2013 iLab Solutions, LLC.
staging.ilabsolutions.com | [privacy policy \(pdf\)](#) | [security policy](#)

Figure 6. Click on *show/hide payment configuration* to see when facilities require payment information from customers.

Institution and Lab Memberships and Settings

Next to the Cores tab is the institution *Memberships* tab. On this page you will see panels to:

1. View and set up Departments
2. View, find and access institution Research Groups (labs)
3. View the list of uses with institution administrative access
4. View and manage partner institutions

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

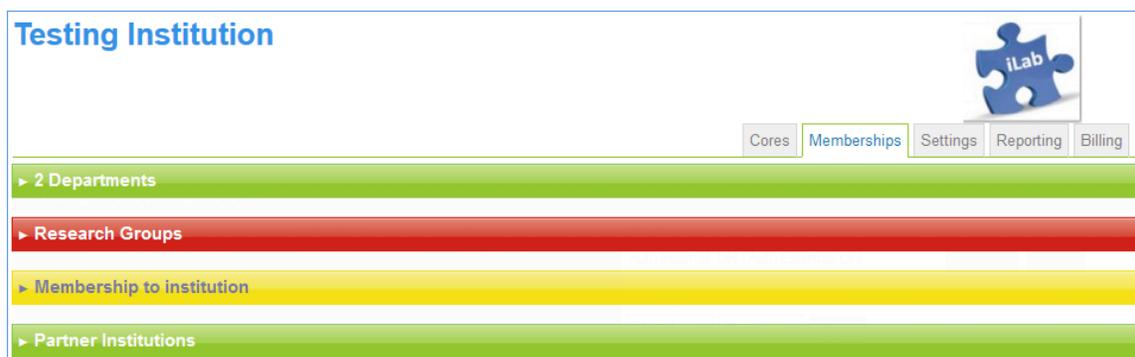


Figure 7. Under the Memberships panel institution administrators can help manage Departments, Research Groups, Institution Administrators and Setting up Institution Partnerships in our system.

How do I Add and Manage Departments?

Some institutions need to have labs (research groups) to be listed under *Departments* for billing and reporting purposes. iLab allows institutions to set-up, edit and view departments within their institution. For more information [click here](#).

How do I Address Lab Memberships with ID Authentication and Integrations?

Many institutions have *ID Authentication* set up with iLab. This is where users would log in with their institution log in and password and then their PI can approve their account request. As an institution administrator, you can see the entire *Lab Access Requests*. You can approve a lab access request on behalf of the PI under the blue *Lab Access Request* panel then, if you have financial integration with us, give the user access to funds. For more information on ID Authentication or general Integrations please [click here](#).

How do I view, add and manage research groups in iLab?

To see a list of Labs/PIs in iLab, click on the red *Research Group* panel. From there, you can either look through the list of groups or start typing in a group name in the live search in the upper right corner. You can click on a name to access the lab setting page.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Under the Memberships tab, click on Research groups to Add, search and view groups within your institution.

Start to type in part of the group's name to use our live search.

name	department	managers
Abdo, Pandora (DWSU) Lab		Pandora Abdo
Abel, Edelmira (DWSU) Lab		Edelmira Abel
Abeyta, Briqitte (DWSU) Lab		Briqitte Abeyta
Absher, Mariette (DWSU) Lab		Mariette Absher
Acosta, Ami (DWSU) Lab		Ami Acosta
Addy, Ira (DWSU) Lab		Ira Addy
Adkinson, Epifania (DWSU) Lab		Epifania Adkinson
Aqnew, Ivan (DWSU) Lab		Ivan Aqnew Ira Addy Noble Mulligan

Figure 8. Click on the *Search for a specific research group* field to find a group by typing in the group name.

Institution administrators also can add research groups from the *Research Groups* panel.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

a.

The screenshot shows the 'Add group' dialog box in the iLab system. The 'Name' field is filled with 'Cain Lab'. The 'Manager' radio button is selected, and the 'Select existing' dropdown menu is open, showing a list of existing users including James Cain, Claude Monet, Clayton Enga, Constance Ullrich, Dan Helling, Daniel Thomas, Danielle Bird, Darah Arcia, Deborah Nolan, Dimitar Peychinov, Duncan Hilton, Ellen Ebert, Emanuel Schuster, Enguerran Loos, Evan Sagge, Franklyn Crane (Post Doc), Hao Zhang, Heather Lorenz, Igor Suleymanoff, Jacky Stoltenberg, and James Cain. A green callout box with an arrow pointing to the 'Add' button at the top left corner contains the text: 'Click on Add at the top left corner of the Research Group panel then fill out the fields.' Another green callout box with an arrow pointing to the 'Select existing' dropdown menu contains the text: 'You can choose to create a group under an existing iLab user on the left side of the pop up.'

b.

The screenshot shows the 'Add group' dialog box in the iLab system. The 'Name' field is filled with 'Spercy Test Lab'. The 'Sharing' dropdown menu is set to 'stealth'. The 'Manager' radio button is selected, and the 'Create new' radio button is also selected. The 'Login/email' field is filled with 'jspercy@ilabx.test.com', the 'Password' and 'Confirm password' fields are filled with dots, the 'First name' field is filled with 'Jane', and the 'Last name' field is filled with 'Spercy'. A green callout box with an arrow pointing to the 'Create new' radio button contains the text: 'Create a group under a new user and create a new user account.'

Figure 9. Institution Administrators can add groups to iLab. Click on Add on the upper left corner of the Research Groups panel and either create a group under and existing iLab user (a.) or create the group under a new user account (b.).

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

To add research groups:

1. Click on *Add* at the upper left corner of the *Research Groups* panel
2. If the group or lab head is already in the iLab system then fill out the fields on the left side of the add a lab popup (*Figure 9a*).
 - a. Enter the desired group name
 - b. Choose if the user you want to create the group under is the manager or a Principal Investigator
 - c. Find the user in the drop down menu
 - i. *Tip: If you start to type in the user's first name after clicking on the drop down menu, you will be brought to their name in the list.*
 - d. Click on *Add*
3. If the group or lab head is not in the system, add the manager's or PI's information in the fields on the right of the pop-up under *Create new* (*Figure 9b*).
 - a. Enter in the correct institution email address for the manager or PI
 - b. Create a temporary password
 - c. Enter in the person's first and last name
 - d. Click on *Add*
4. After you click on *Add*, a welcome email will be sent to the user, if they did not already have an account and the new lab will be added to the list of cores
 - a. *Note: When you first add a group, it will show at the top of the list of Research Groups as confirmation that the group was added.*

Please [click here](#) to see more information on lab settings, how to manage funds or if you have basic financial [integration](#), and how to manage lab members.

How can I view and add institution administrators?

The yellow *Members* panel will list all of the Institution administrators that are set up in iLab. You can also add new administrators here as well.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Membership to institution

Manage administrator and staff access

Add additional members:
john
7 results for joh:

Name	Invite
Alize Johns	voucher_issuer [Invite]
Paul Johnson	voucher_issuer [Invite]
Signid Johnson	voucher_issuer [Invite]
Asa Johns	voucher_issuer [Invite]
John Pollich	voucher_issuer [Invite]
Jensen Johnson	voucher_issuer [Invite]
Janet Johns	voucher_issuer [Invite]

current managers and employees

Name	Email	Actions
Bas Van	bas.van@test.ilabx.com	[Edit] [Delete]
Bertha Hauck	bhauck2@test.ilabx.com	[Edit] [Delete]
Haylie Nikolaus	hnikolaus1@test.ilabx.com	[Edit] [Delete]
iLab Administrator	support@ilabsolutions.com	[Edit] [Delete]
Jessica	jessica@test.ilabx.com	[Edit] [Delete]
Julian Wehner	jwehner7@test.ilabx.com	[Edit] [Delete]
Kiana Sipes	ksipes3@test.ilabx.com	[Edit] [Delete]
Torrey Sawayn	tsawayn4@test.ilabx.com	[Edit] [Delete]

Admin
An admin can create service centers

Financial Manager
A financial manager can initiate billing cycles

Manager
A manager can...

Voucher Issuer
An individual who can issue vouchers

Figure 10. View and add institution administrators to iLab and choose their access level. Note: The person must have an iLab account for you to add them.

Users you give institution administrative access to can accomplish all topics covered in this manual. *Financial Managers* and *Voucher Issuers* have a more limited access and can only access their designated financial duties in iLab. Please reach out to your iLab Account Manager if you need more clarification on specifics for your institution.

Can I add partner institutions and what does that do for my users?

The last panel, is a green *Partner Institutions* panel. Here you can view the institution list to add any as a partner institution (*Figure 11*). In iLab, any partner institution you add that have core facilities in iLab will have their list of cores show in a segregated section below your institution's list of core for you institution members to easily view on the *list all cores* page (*Figure 12*).

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

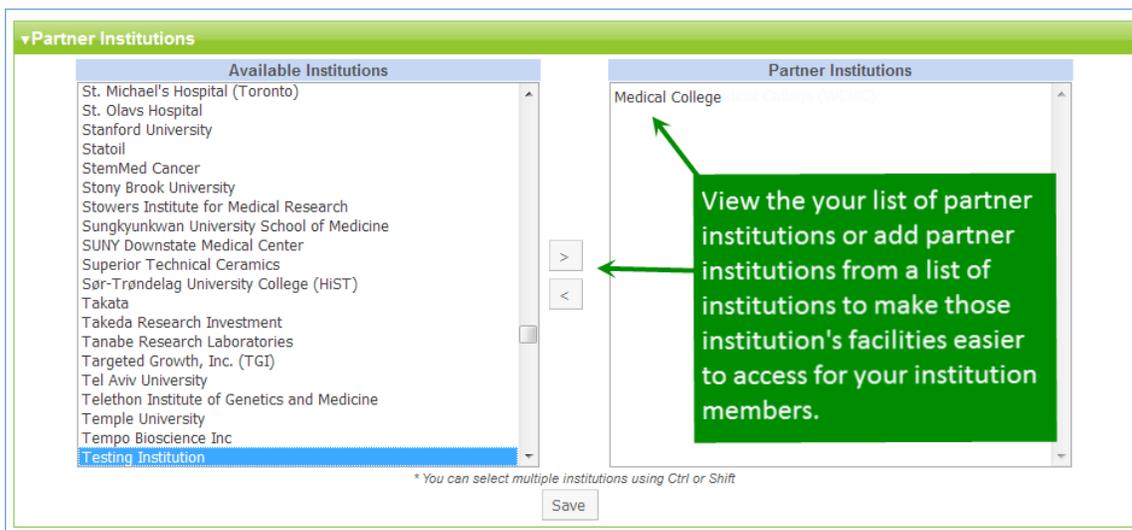


Figure 11. In some cases there may be other institutions that you would prefer your researchers to use if they do not use your facilities. You can add these institutions to your partner institution list so their facilities will come up under your facilities on the list all cores page.

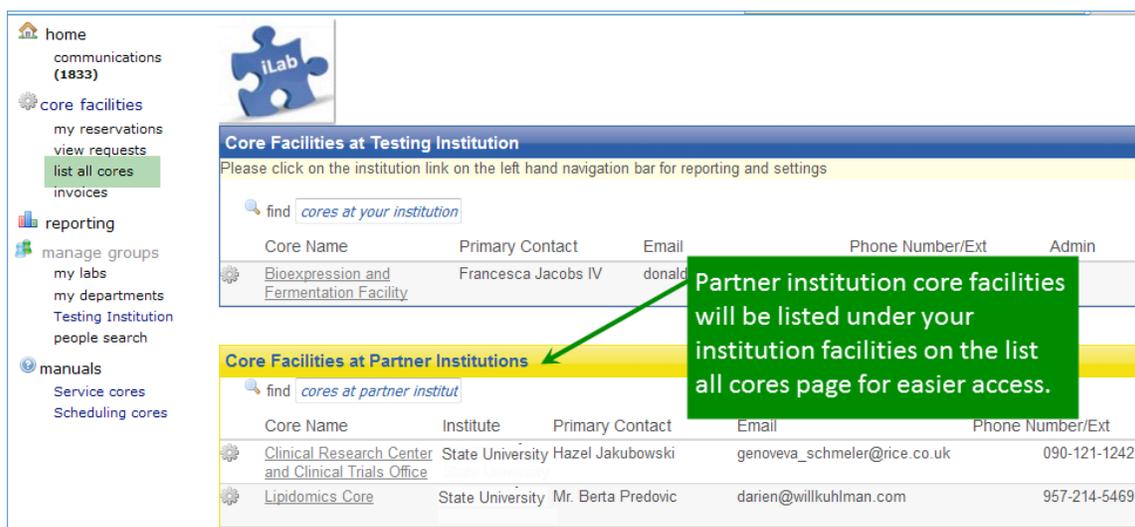


Figure 12. The core facilities of the institutions that you have added as a partner will show under your institution's list of core for easier access for your researchers.

What Institution Settings can I manage?

The next tab is the institution *Settings* tab (Figure 13). Here you can:

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

6. Download csv files that list all research group contacts, all active core facilities users and all services and calendar price lists for all of your facilities.
6. View the institution logo iLab has for your institution.
 - a. Note: Contact support@ilabsolutions.com if you want to update the logo.
6. Add a default auto-approval amount for your labs.
 - a. Example: If you set the auto pre-approval amount to \$10,000 then any new labs added to lab under your institution will not require the lab administrator's approval for service requests unless the quotes exceed \$10,000.
6. If you do not have ID Authentication, you can add text to your registration pages for new user to see when they want to register for facility use (*Figure 14*).
6. Have lab access requests that are rejected trigger a notification email to institution administrators. This will only work for institutions that have ID Authentication.
6. If your research groups are using our requisitioning system, you can add a note for them to see when ordering materials.
6. Work with your iLab Account Manager about invoices and if invoice require approval before charges can be billed. If you do have your invoices set up to required approval before charges can be billed, add reasons why and institution administrator may need to approve an invoice for a lab for tracking purposes.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Cores Memberships **Settings** Reporting Billing

Download exportable lists for Testing Institution (all csv)

- [Download lab/PI/SC contact list](#)
- [Download all users list](#)
- [Download all services and prices list](#)

Settings

Logo

 please email support@ilabsolutions.com to change this

Service Request Pre-Approval Amount: 10000.0
The amount to auto-approve service requests up to

Text for Registration Page (with integration, custom pages controller by iLab)

This ia a demonstration site. Please contact support@ilabsolutions.com if you need any assistance.

Any content here will display on the standard registration page

Send notification emails to institution administrators when a person that had requested lab membership has been rejected?

Manage Requested Note: this note will appear at the lab managers page for managing requests (lab management customers only)

Valid reasons for invoice approval by and institution administrator: Lab Administration Unresponsive|Received Written Approval
Please separate valid reasons with a vertical bar "|".

Save

©2006 – 2013 iLab Solutions, LLC.

Figure 13. Manage some institution settings under the Settings tab. If you do not see the setting you want to update, reach out to your iLab Account Manager for assistance.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

The screenshot shows a registration form for iLab Solutions. At the top left is the iLab logo. At the top right, it says "Already have an account? Click [here](#) to login". The main heading is "You are requesting access to the Testing Institution's For Demonstration Only - Biology Core". The form includes several input fields: "Your name:", "Your email address:", "Your phone number:", "Your lab's name:", "Your PI's name:", "Your PI's email address:", "Financial Admin's name:" (with a note: "The person who can help supply accurate payment information"), "Financial Admin's email address:", "Financial Admin's Telephone:", and "Your Institution's or Company's name:" (with a note: "Begin typing your institution's name and a completion list will appear"). There is a "Spam protection filter" section with a CAPTCHA image showing the word "undated was" and a "Type the text" input field. Below the CAPTCHA is a checkbox for "I agree with iLab's [privacy](#) and [security](#) policies" and a "Request Account" button. A right-hand sidebar titled "Testing Institution Service Centers" lists services: "Discover how iLab's service centers can benefit your research", "Request a service electronically to save time", and "Track the status of your lab's service requests". It also lists "Who's on board so far..." with links to "MicroCT Testing Core", "Bioexpression and Fermentation Facility - Coming Soon!", "iLab Repository Core - INTERNAL USE ONLY - Coming Soon!", "For Demonstration Only - Biology Core - Coming Soon!", and "Electron Microscopy and Histology Core Facility - Coming Soon!". The footer contains the copyright notice "©2006 - 2013 iLab Solutions, LLC".

Figure 14. Here is an example of a standard registration page for new users if your institution does not have ID Authentication.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Charge Justifications: How do I require justifications for Not Billable, Pro Bono, No Charge and Flex Charges?

In iLab's Core Facility Management System, institution administrators can set the degree of control they would like to have concerning how their facilities bill for work. One of the tools iLab provides is the ability to require and define justifications for no charge, not billable, pro bono and flex charges. To turn on this feature, please follow the instructions below. Please reach out to your iLab Account Project Manager or to support at support@ilabsolutions.com for more information.

Institution administrators can choose to either require justifications for *Not Billable*, *Pro Bono* and *No Charge* line items and/or for flex charges by clicking on the setting on their *Settings* tab (*Figure 19*). Under each setting is a field for the administrator to enter customized allowable justifications. These allowable justifications need to be fifty characters or less and will be seen on invoices and reporting. Please separate each reason with a vertical line (|).

The screenshot shows the 'Settings' tab in the iLab Solutions interface. At the top, there are navigation tabs for 'Cores', 'Memberships', 'Settings', 'Reporting', and 'Billing'. Below these, there are links to download exportable lists for testing institutions. The main section is titled 'Settings' and contains several configuration options:

- Logo:** A blue puzzle piece logo with 'iLab' text. Below it is a note: 'please email support@ilabsolutions.com to change this'.
- Service Request Pre-Approval Amount:** A text input field containing '0.0'. Below it is the text: 'The amount to auto-approve service requests up to'.
- Text for Registration Page (with integration, custom pages controller by iLab):** A rich text editor with a toolbar. The content area contains the text: 'Please contact support@ilabsolutions.com if you need any assistance.' Below the editor is the note: 'Any content here will display on the standard registration page'.
- Send notification emails to institution administrators when a person that had requested lab membership has been rejected?** A checkbox that is currently unchecked.
- Manage Requested Note:** A text input field. Below it is the note: 'this note will appear at the lab managers page for managing requests (lab management customers only)'.
- Require justification for non-billable and pro-bono charges:** A section with an orange header. It includes a checked checkbox and the text: 'If this option is turned on, the core facility will be required to provide a valid justification for all non-billable and pro-bono charges.*'. Below this is a text input field containing 'Credit|Failed Processing|No Charge Service'.
- Require justification for flexible charges:** A section with an orange header. It includes a checked checkbox and the text: 'If this option is turned on, the core facility will be required to provide a valid justification for all flexible charges.'. Below this is a text input field containing 'Special Order|Reagent|Non-Standard Fee'.

At the bottom right of the settings area, there is a 'Save' button.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Figure 15. Under the *Settings* tab of your institution page, scroll towards the bottom to see the fields to enter in allowable justifications for charge line items. Note that these justifications will be seen on invoices and have a maximum of fifty characters.

Once the justifications are defined, when core staff change the *Billing Status* to *Not Billable*, *Pro Bono* or *No Charge* on charge line items, they will be prompted to choose the reason for the zero dollar charge.

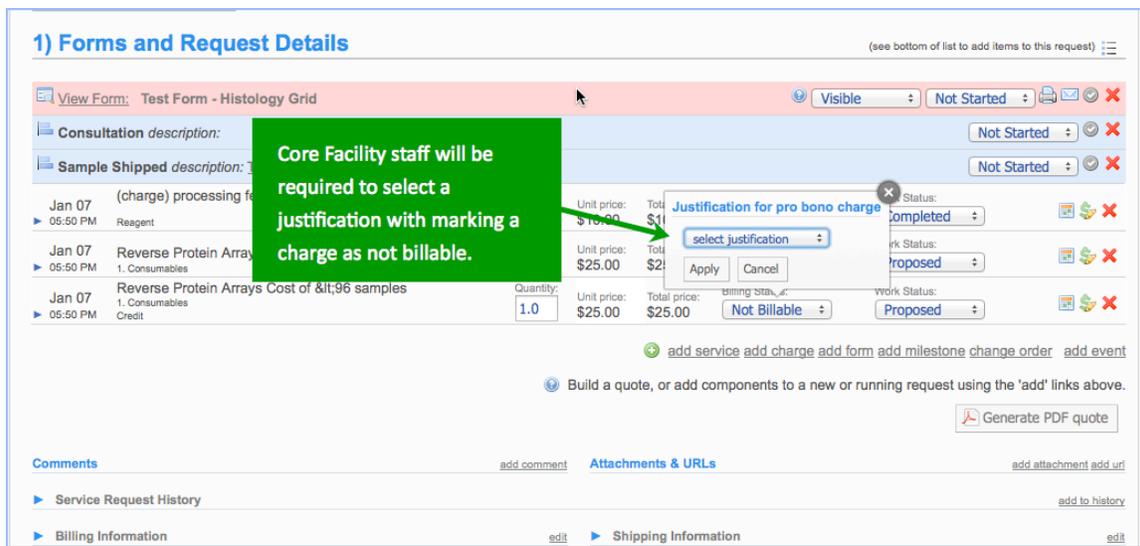
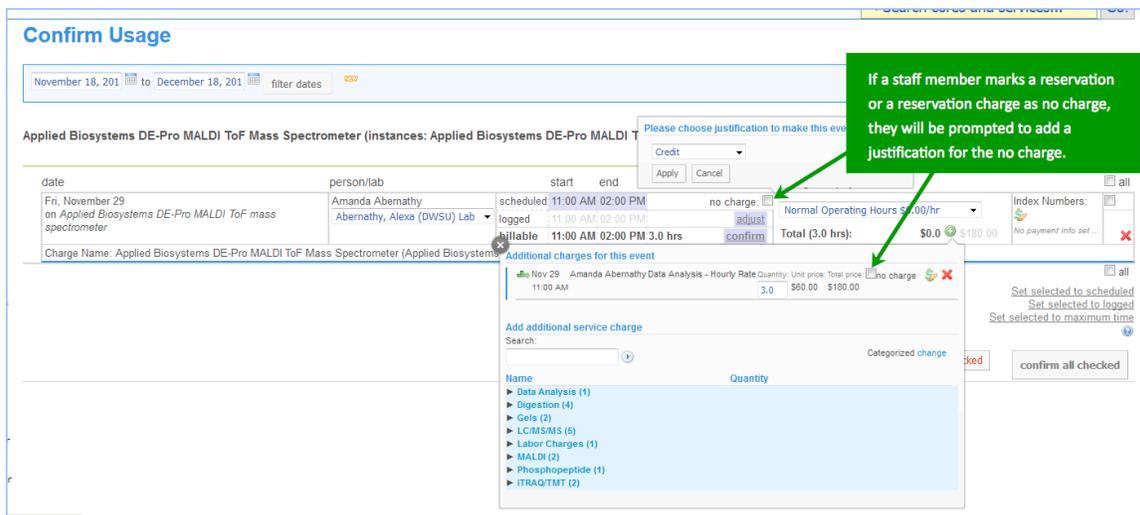


Figure 16. When a core member changes the billing status to *Not Billable* or *Pro Bono*, they will be prompted to choose why they are making the line item a no charge item from a drop down of reasons entered by administration.



iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Figure 17. When core staff identify a reservation or reservation add-on as *no charge*, they will be prompted to provide a reason by selecting from the drop-down menu. The drop-down menu justifications are previously determined by the administration.

If administration wants cores to justify why they are adding flex charges, the core will be prompted to choose the reason of the flex charge from a list of drop down of options.

The screenshot shows the 'Forms and Request Details' page. A table lists items with columns for Quantity, Unit price, Total price, Billing Status, and Work Status. A modal form is open for adding a charge, featuring a 'Justification:' dropdown menu. A green callout box contains the text: 'When core staff add flex charges to a project, they will be prompted to justify why they are adding the charge.' The modal form also includes fields for name, unit price, quantity, unit, and category, along with an 'Add' button and a note: 'Please enter a name and price for each charge.'

Figure 18. When a core staff member adds an ad-hoc charge, they will be prompted to choose a reason from a drop down of options provided by institution administration.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Flex charge or no charge justifications can be seen on the line item in the following ways:

1. On the request: If a *Billing Status* is changed to *Not Billable* or *Pro Bono*, hover over the status to see the reason.

Forms and Request Details (see bottom of list to add items to this request)

View Form: Test Form - Histology Grid

Consultation description: note: click to edit

Sample Shipped description: Test link note: click to edit

Date	Service	Description	Quantity	Unit price	Total price	Billing Status	Work Status
Jan 14 12:50 PM	DNA Seq. - 96 well plate	Failed Experiment	2.0	\$351.00	\$702.00	Not Billable	Proposed
Jan 14 12:56 PM	(charge) Fee	Non-Standard Fee	1.0	\$25.00	\$25.00	Not Ready T	Proposed

add service add charge add form add milestone change order add event

Build a quote, or add components to a new or running request using the 'add' links above.

Generate PDF quote

Comments add comment Attachments & URLs add attachment add url

Service Request History add to history

Billing Information edit Shipping Information edit

2. On the request: If a flex charge is added, the reason for the charge will be printed below the charge name, next to the charge category.

Forms and Request Details (see bottom of list to add items to this request)

View Form: Test Form - Histology Grid

Consultation description: note: click to edit

Sample Shipped description: Test link note: click to edit

Date	Service	Description	Quantity	Unit price	Total price	Billing Status	Work Status
Jan 14 12:50 PM	DNA Seq. - 96 well plate	Failed Experiment	2.0	\$351.00	\$702.00	Not Billable	Proposed
Jan 14 12:56 PM	(charge) Fee	Non-Standard Fee	1.0	\$25.00	\$25.00	Not Ready T	Proposed

add service add charge add form add milestone change order add event

Build a quote, or add components to a new or running request using the 'add' links above.

Generate PDF quote

Comments add comment Attachments & URLs add attachment add url

Service Request History add to history

Billing Information edit Shipping Information edit

3. On review usage for scheduling: If a reservation or add-on charge is marked *no charge*, hover over *no charge* to see the justification.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Confirm Usage

December 14, 2013 to January 14, 2014 filter dates

Test Calendar (instances: Test Calendar) Return to Schedules Upload Usage Unconfirmed Usage Confirmed Usage

date	person/lab	start	end	pricing and payment info	<input type="checkbox"/> all
Wed, December 25, 2013 on Test Calendar	Charlotte Test Sterns, Tesha (TES) Lab Select existing project	scheduled: 01:00 PM	03:00 PM	Credit No charge Afternoon (no charge)	<input type="checkbox"/>
		logged: 01:00 PM	02:23 PM	Core	<input type="checkbox"/>
		billable: 01:00 PM	02:00 PM	1.0 hrs Total (1.0 hrs): (no charge)	<input type="checkbox"/>
Charge Name: Test Calendar Thu 26 Dec, 2013 01:00 PM					<input type="checkbox"/> all
					<input type="checkbox"/> unconfirm all checked

- On the new billing event page: If you see a charge that has a status of *Not Billable to Pro Bono* on the new billing event page or view charges page, hover of the status to see the justification.

2. Review and select which charges to include

Included charges

search franklyn

date	customer	service id	total	payment number	status	actions
01/14	Franklyn Crane Crane (Post Doc), Franklyn (TES) Lab	FDO-BC-FC-18-4 (charge) Fee	\$25.00 (1.0 x \$25.00)	Cost Center (Put in payment expiration information) Please provide a PO numbers: 100.0% 123456789	Ready To Bill	<input type="checkbox"/> <input type="checkbox"/>
01/14	Franklyn Crane Crane (Post Doc), Franklyn (TES) Lab	FDO-BC-FC-18-4 DNA Seq. - 96 well plat	\$702.00 (2.0 x \$351.00)	Cost Center (Put in payment expiration information) Please provide a PO numbers: 100.0% 123456789	Failed Experiment Not Billable	<input type="checkbox"/> <input type="checkbox"/>
01/07	Franklyn Crane Crane (Post Doc), Franklyn (TES) Lab	FDO-BC-FC(D-CID-HID) (charge) processing fee	\$10.00 (1.0 x \$10.00)	Cost Center (Put in payment expiration information) Please provide a PO numbers: No payment info set ...	Ready To Bill	<input type="checkbox"/> <input type="checkbox"/>
12/11	Beverly Wigginton Crane (Post Doc), Franklyn (TES) Lab	FDO-BC-BW-6-7 Media	\$30.00 (1.0 x \$30.00)	Cost Center (Put in payment expiration information) Please provide a PO numbers: 100.0% 123456	Not Billable	<input type="checkbox"/> <input type="checkbox"/>
12/11	Beverly Wigginton Crane (Post Doc), Franklyn (TES) Lab	FDO-BC-BW-6-7 DNA Seq. - 96 well plat	\$0.00 (0.0 x \$351.00)	Cost Center (Put in payment expiration information) Please provide a PO numbers: 100.0% 123456	Not Billable	<input type="checkbox"/> <input type="checkbox"/>
12/11	Beverly Wigginton Crane (Post Doc), Franklyn (TES) Lab	FDO-BC-BW-6-7 Incubator for Staging	\$45.83 (1.83333 x \$25.00)	Cost Center (Put in payment expiration information) Please provide a PO numbers: 100.0% 123456	Not Billable	<input type="checkbox"/> <input type="checkbox"/>

- On the new billing event page: If you see a flex charge (indicated by the *(charge)* just before the charge name), then you can see the justification by hovering over *(charge)* on the charge name.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

2. Review and select which charges to include

▼ Included charges

search franklyn Clear

date	customer	service id	total	payment number	status	actions
01/14	Franklyn Crane Crane (Post Doc), Franklyn (TES) Lab	FDO-BC-FC-18-4 (charge) Fee no category	\$25.00 (1.0 x \$25.00) Non-Standard Fee	Cost Center (Put in payment expiration information) Please provide a PO numbers: 100.0% 123456789	Ready To Bill	↓ ↻
01/14	Franklyn Crane Crane (Post Doc), Franklyn (TES) Lab	FDO-BC-FC-18-4 DNA Seq. - 96 well plat Service	\$702.00 (2.0 x \$351.00)	Cost Center (Put in payment expiration information) Please provide a PO numbers: 100.0% 123456789	Not Billable	⚠ ↓ ↻
01/07	Franklyn Crane Crane (Post Doc), Franklyn (TES) Lab	FDO-BC-FC(D-[CID]-[IID]) (charge) processing fee no category	\$10.00 (1.0 x \$10.00)	Cost Center (Put in payment expiration information) Please provide a PO numbers: No payment info set...	Ready To Bill	⚠ ↓ ↻
12/11	Beverly Wigginton Crane (Post Doc), Franklyn (TES) Lab	FDO-BC-BW-6-7 Media Services	\$30.00 (1.0 x \$30.00)	Cost Center (Put in payment expiration information) Please provide a PO numbers: 100.0% 123456	Not Billable	⚠ ↓ ↻
12/11	Beverly Wigginton Crane (Post Doc), Franklyn (TES) Lab	FDO-BC-BW-6-7 DNA Seq. - 96 well plat Service	\$0.00 (0.0 x \$351.00)	Cost Center (Put in payment expiration information) Please provide a PO numbers: 100.0% 123456	Not Billable	⚠ ↓ ↻
12/11	Beverly Wigginton Crane (Post Doc), Franklyn (TES) Lab	FDO-BC-BW-6-7 Incubator for Staging Tissue Culture	\$45.83 (1.83333 x \$25.00)	Cost Center (Put in payment expiration information) Please provide a PO numbers: 100.0% 123456	Not Billable	⚠ ↓ ↻

- On the Invoice: The justification for the no charge line item or flex charge will replace the status of the charge on the invoice.

show additional contacts

Invoice Total							\$474.00
Invoice Details							
DATE	ITEM DESCRIPTION	PMT.#	QTY	PPU	STATUS	TOTAL PRICE	
▼ Request: FDO-BC-FC-97 Start: March 22, 2012 Owner: Franklyn Crane							
January 02, 2014	Weekly Charge	222-33-445	0.0	\$12.00/ea	Completed	\$0.00	↻
Actual cost: \$25,425.00		Projected cost: \$130.00		Invoice cost: \$0.00			
▼ Request: FDO-BC-FC(D-424 Start: January 02, 2014 Owner: Franklyn Crane							
December 11, 2013	Media		1.0	\$30.00/ea	work not completed	\$0.00	↻
January 07, 2014	(charge) p53 Antibody	sample34	1.0	\$123.00/ea	Consumables	\$123.00	↻
Actual cost: \$123.00		Projected cost: \$30.00		Invoice cost: \$123.00			
▼ Request: FDO-BC-FC(D-424 Start: January 02, 2014 Owner: Franklyn Crane							
January 02, 2014	DNA Seq. - 96 well plate	sample34	1.0	\$351.00/ea	Completed	\$351.00	↻
Actual cost: \$381.00		Projected cost: \$381.00		Invoice cost: \$351.00			
Invoice Total							\$474.00

Powered by iLab Solutions

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Note: Depending on your settings, you may not see all of the settings options above or you may see different ones. Please reach out to your iLab Account Manager or support@ilabsolutions.com with help on adjusting your settings.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

What reporting features do I have access to, so I can run usage reports?

Institution administrators can run usage reports from the *Reporting* tab. For more information on running reports, please [click here](#).

Can I review Invoices and Billing Events within iLab?

As an institution administrator you have access to all billing events and invoices created by your facilities. You can access a list of billing events from the Billing tab. Here you can do the following:

1. Narrow your search by filtering for different options on the left-hand side of the page
2. View event details and summary
3. View the billing event's specific invoices
4. Sort your list by clicking in the column header

Displaying 30 out of 93 results. (Page 1 of 4)

Core Name	Name	Created By	Status	Date Added	Value (# of charges)
For Demonstration Only - Biology Core	For Demonstration Only - Biology Core - May	Darah	Billing initiated	May 24 '13	\$144.50 (4)
For Demonstration Only - Biology Core	For Demonstration Only - Biology Core - May				
For Demonstration Only - Biology Core	For Demonstration Only - Biology Core - May				

Click on the Billing tab to see a list of facility billing events. Use filters and column sort to help you find the events you need to review. Click on the event *Details* or *Invoices* for more information.

Figure 19. Click on the Billing tab from your institution page to view billing events created by your institution's core facilities.

Can I view all facility invoices in one location?

To view a list of all invoices, click on invoices on the left side of your iLab page. For more information on invoices, [click here](#).

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

How is a billing event created and managed?

For more information on how billing events are created and managed, please [click here](#).

To view support tickets that have been created by your institution members, click on the orange *Support Tickets* panel.

The last panel is the blue *Settings* panel where you can manage some institution settings. If you want to change a setting that you do not see on this panel, please contact your iLab Project Manager or support@ilabsolutions.com.

iLab Solutions Core Facilities Institution Administrator Help Manual

Revision Date: 1/28/2014

Can I track iLab support issues brought up by institution members?

Live support for iLab is available from 8:30am to 8:30pm Eastern Time (US). There are several ways to contact our support team:

- Email - support@ilabsolutions.com,
- Phone - 617.297.2805 or by
- Leave iLab Feedback Button - Click on *leave iLab feedback (Figure 1)* at the upper-right corner of your iLab page.

If a support issue is left using the leave *iLab feedback* option, a support ticket is created. As an institution administrator, you can view all support tickets created by your institution members.

1. To view the support tickets, click on *support* at the upper-right of your iLab page (*Figure 1*).
2. On the support page you can filter for tickets by user, date, status and more. You can also view the tickets see the communications back and forth and see if the issue has been resolved.

For more information please reach out to your iLab Account Manager or support@ilabsolutions.com.