

Implementation Experience: Charge Entry Testing Manual

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Overview

Welcome the iLab Family! We are excited to have the opportunity to work with you and are eager to ensure your implementation experience runs smoothly. This manual includes materials and instructions to help supplement your iLab implementation experience.

Implementation Experience Contact

Your Onboarding Manager is your contact during this initial phase of training. As we collaborate on this implementation, please email your Onboarding Manager with any questions, issues, concerns, or updates you have for your site.

Additional Resources

Additional resources can be found on the [iLab Help Site](#). You can also sign up for any of our editing [Webinars](#) at any time during or after implementation!

iLab Registration & Login Guide

As a Site Manager or Staff Member, you will need access to iLab to continue your implementation

meetings and to properly review your site.

iLab software serves a global user base, with institutions located across various continents. To optimize performance and comply with local data regulations, iLab is hosted on six different servers or instances. This regional server configuration ensures a more efficient and reliable user experience.

- [Regional Login Links](#)
- [Using the iLab Access Guide Widget](#)

[Regional Login Links](#)

- **United States:** my.ilab.agilent.com
 - **Dana Farber Cancer Institute (DFCI):** dfci.ilab.agilent.com
 - **Stanford University:** stanford.ilabsolutions.com
 - **Important:**
 - If you already have an account on my.ilab.agilent.com, you will need to create a separate account for the DFCI or Stanford instances to access their platforms.
 - Similarly, users with DFCI or Stanford accounts cannot use those credentials on my.ilab.agilent.com and will need to create an account for other U.S.-based locations.
- **Canada:** ca.ilab.agilent.com
- **Europe:** eu.ilab.agilent.com
- **Asia-Pacific:** au.ilab.agilent.com

If you are unsure which link to use, the [iLab Access Guide Widget](#) is available to assist you. This tool guides users to the correct iLab landing page based on their institution's requirements. Simply follow the predefined questions, and the widget will direct you to the appropriate signup or login page.

Testing Instructions

- The training phase of your iLab Implementation is critical. During these sessions, you will collaborate with your iLab Onboarding Manager to understand your site's workflow and capabilities.
- Testing is essential for a successful go-live launch. It builds confidence and comfort with iLab and allows you to identify any workflow issues with your current setup.

Your Onboarding Manager will provide you with login credentials for a Test User to view and navigate the system from the **customer's perspective**.

To comprehensively learn and test all parts of your core's site content and workflow, please follow the steps outlined below. Login with the Test User account to see the site from the **customer perspective**. Then log out and follow the instructions to login with your own account for the **site admin experience**.

- **Quick tip: Login to a browser as yourself and another browser or open an incognito window to login as your Test User. This will help you quickly walk through the workflow of each perspective.**

Charge Entry Quick Add – Creating a new request:

1. **Login** with **your iLab credentials**.
2. Click the 'Charge Entry' Tab.
3. Select the 'Create a new request' option.
4. You may choose to either search for a Fund or by Owner (setting dependent).
5. If using 'Search Funds,' begin typing the fund number, then click on the desired fund once it appears. *(Please note: once the fund number is selected, you will choose an owner and lab for the request. These fields will only populate owners that are assigned the fund number and labs that the owner and fund number associated with).*
6. If searching by 'Select Owner,' type in the customer you're adding these charges on behalf of *(for a user that hasn't yet worked with your core in iLab, please select 'this institution' or 'all' before searching his/her name).*
7. Select the service charge.
8. Adjust the quantity if needed.
9. Adjust the date as needed.
10. Click the green 'Add to list' button.
11. Review the charges then click the 'Create request & confirm charges' button.
12. You may enter payment info at this point if you know the appropriate fund number.
13. If you intend to add future services to this request, uncheck the 'Complete request?' Checkbox.
14. Click 'Submit' request.

Charge Entry Quick Add – Adding to an existing request:

1. **Login** with **your iLab credentials**.
2. Click the 'Charge Entry' Tab.
3. Select the 'Add to an existing request' option.

4. Select the project request you'd like to add services to (*please note: the project MUST be in a status of processing!*)
5. Select the service charge.
6. Adjust the quantity if needed.
7. Adjust the date as needed.
8. Click the green 'Add to list' button.
9. Review the charges then click the 'Confirm charges' button.

Long standing projects with Charge Entry Quick Add – Creating a new request:

Option 1:

1. **Login** with **your iLab credentials**.
2. Click the 'Request Services' Tab.
3. Click on the 'request service' button to the right of the project.
4. Enter the payment information if applicable.
5. Select the 'Skip approval?' checkbox.
6. Select the 'Begin work' checkbox.
7. Click the 'submit request to researcher' button.
8. You are now ready to add charges via the charge entry tab to this project (*see the 'Charge Entry - Adding to an existing request' section above for instructions*).

Option 2:

1. **Login** with **your iLab credentials**.
2. Click the 'Charge Entry' Tab.
3. Select the 'Create a new request' option.
4. Type in the customer you're adding these charges on behalf of (*for a user that hasn't yet worked with your core in iLab, please select 'this institution' or 'all' before searching his/her name*).
5. Select the service charge.
6. Adjust the quantity if needed.
7. Adjust the date as needed.
8. Click the green 'Add to list' button.
9. Review the charges then click the 'Create request & confirm charges' button.
10. You may enter payment info at this point if you know the appropriate number.
11. Uncheck the 'Complete request?' checkbox.
12. Click 'Submit' request.

Charge Entry File Upload – entering services/projects via upload:

1. **Login** with **your iLab credentials**.
2. Click the 'Charge Entry' Tab.
3. Select the 'File Upload' option.
4. Download the 'File template' (*you may use the 'file help' option to guide you in filling out this template*).
5. Populate the 'service_id' column with the system generated number for the desired service 'service name' (service ID). You can download a list of your service's IDs using the 'Core Services' link.
6. You have to option to include a note, which will follow the charge through to the invoice.
7. Indicate the quantity in the 'service_quantity' column.
8. If you'd like to backdate the charge, you may enter a date in 'purchased_on.' If left blank the current date will populate.
9. Populate the 'service_request_id' column with the system generated number for your pre-existing project request. You can download a list of your core's active projects using the 'Active Service Requests' link. (*Please note: it's recommended that the project be in a status of 'processing' to ensure the system updates the billing status of the uploaded charges.*)
10. If you are uploading charges to a pre-existing project, you can skip the 'owner_email' and 'pi_email' columns. For creating a new project using the upload, these two columns should be populated, but 'service_request_id' can be skipped.
11. Save your CSV file.
12. Click the 'Upload file' button.
13. Name your upload.
14. If you've chosen to include notes in your upload, specify how you'd like the system to treat those notes (append, prepend, etc.)
15. Click 'Choose File' and select your saved upload.
16. Click the 'Upload file' button.
17. Once your upload line displays, click 'Validate.' At this time the system will list any errors.
18. Click 'Process.'

The status should update to "Processed" and you can now view your charges by clicking the 'magnifying glass' icon, or navigating to the 'View All Requests' tab and opening the project details.

For additional information, you can read more on [Charge Entry](#) in our Help Site.