

Implementation Experience: Time 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.**

Time Entry Testing

Initiating a Time Entry project:

Creating a Service Request is a necessary step for logging time entry as the time is connected with the Service Request ID.

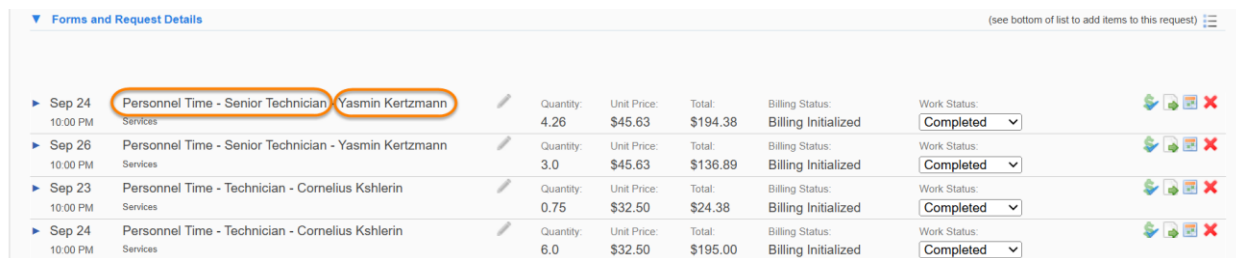
1. **Login** with **your iLab credentials**.
2. Click the 'Request Services' Tab.
3. Click on the 'request service' button to the right of a project request enabled for Time Entry.
4. Enter in the name of the **Test User** your Onboarding Manager provided and then click proceed.
5. In the 'Project Summary' field, input something in the description field to help identify the project (e.g. 'Study of ABC across XYZ'). *Please note: this field 'project summary' title can be adjusted to display something more meaningful, such as 'job summary' or project description.'*
6. Before you submit the project, you can check the box that says, 'Begin work' - this will put the project in the higher-level status of 'Processing,' which will allow staff to add Time Entry charges against it.

Adding time against a Time Entry project:

1. **Login** with **your iLab credentials**.
2. Ensure that the time entry project you'd like to add time against is in a status of 'processing' (complete steps listed above under the 'Initiating a Time Entry project' section above).
3. Click the 'Time Entry' Tab.
4. Select the appropriate staff name from the dropdown menu.
5. Click on the 'Add New Row' button.
6. A window will display Time Entry services linked to the relevant staff (i.e. the Time Entry charges that have been associated with that staff member). At the top of the window is a search field where you can search for the project by typing the project owner, service request ID, project description.

- Click the 'add' button (be sure to remove any charges you don't want added to the project first).
- Try adding charges for different dates by clicking the down and up arrows or by typing in the quantity, and then click the blue 'Apply Changes' button in the bottom right of the screen to save them.
- Please note there are restrictions on Time Entry and when time can be added. See 'adding a charge manually if incorrect time was processed' below for working around Time Entry restrictions.

Note: Time can be entered into a prior week up until Tuesday 5pm PT/8pm ET of the current week, and into future weeks up to 12 weeks in advance. Changing the status of the Project from Processing to 'Completed,' will also process any time entered against that project. Each entry will list the service provider's name next to the charge (see below).



▼ Forms and Request Details		(see bottom of list to add items to this request) ☰							
▶ Sep 24 10:00 PM	Personnel Time - Senior Technician - Yasmin Kertzmann Services	Quantity: 4.26	Unit Price: \$45.63	Total: \$194.38	Billing Status: Billing Initialized	Work Status: Completed			
▶ Sep 26 10:00 PM	Personnel Time - Senior Technician - Yasmin Kertzmann Services	Quantity: 3.0	Unit Price: \$45.63	Total: \$136.89	Billing Status: Billing Initialized	Work Status: Completed			
▶ Sep 23 10:00 PM	Personnel Time - Technician - Cornelius Kshlerin Services	Quantity: 0.75	Unit Price: \$32.50	Total: \$24.38	Billing Status: Billing Initialized	Work Status: Completed			
▶ Sep 24 10:00 PM	Personnel Time - Technician - Cornelius Kshlerin Services	Quantity: 6.0	Unit Price: \$32.50	Total: \$195.00	Billing Status: Billing Initialized	Work Status: Completed			

Adding a charge manually if incorrect time was processed:

- Login with your iLab credentials.
- Click the 'View All Requests' tab (Tip: You may also navigate directly to the project from the Time Entry tab by clicking the project's 'Job ID' link).
- Review all the projects listed. Locate the appropriate one and click the blue arrow to expand the request in full. (Please note: if the entire project has been previously marked as complete, you'll need to filter for the completed projects by clicking 'active requests' and selecting the 'completed' option).
- Below the Forms and Request Details section, locate the incorrect charge and click the red 'X' to the right to delete it.
- Click the 'Add Service' link and add the appropriate service with the correct quantity.
- To adjust the date, click the 'calendar' icon to the far-right of the charge, adjust date/time as needed, then click 'update dates' (dependent on your site/institution settings).
- You may also use the 'gray pencil' icon to the left of the charge's quantity to add a note to that line item if you'd like to include specifics, such as the staff that performed it. This note will follow the line through to the invoice.
- Change the 'Work Status' dropdown to 'Completed.'

Time Entry Staff Access

Granting staff members access to services for time entry:

- Login with your iLab credentials.

2. Click the 'Request Services' Tab.
3. Scroll down to the 'Service list.'
4. Click the 'yellow pencil' icon to the right of the desired service.
5. Navigate to the 'Service Assignees' section and scroll down to the 'Assign Other Core Members to Resource' section.
6. Click the 'Assign' button found to the right-hand side of the staff member's name.
7. Scroll down and click the blue 'Save' button.
8. Repeat as necessary for additional services (*Tip: Opening multiple services in separate tabs can speed up this process, using the ctrl key for a pc or command key for a mac*).

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