Department Administrators 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. Any requests or reservations using a (VUMC) Lab will be rejected and/or canceled, and the user will be notified they must resubmit their order or reservation using a (VU) Lab that they are a member of. For users to join a (VU) Lab, Department, or to have a Lab created, they must already have an iLab account, and must submit the form that correlates with their role.
1. 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.

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

**Groups**: This is a list of labs currently associated with your department.

**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.

1.2 - **Groups**: If you click on one of the labs, you will be taken to that 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.

![Profile Details](image1.png)

b. **Another Department Manager’s Name:**

You will be taken to another screen that will show you very 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.

![Profile Details](image2.png)
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.

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.

- You can see the name of the lab.
  
  **Group Name**
  
  OCGA Test (VU) Lab

- 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

- 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

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

- 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.

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, 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.

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.

The first two settings must remain checked at all times.
a. 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.

b. 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.

c. **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.

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.

### 1.4.4 Center Numbers Tab:

Please see Section 2.

### 1.4.5 Reporting Tab:

Please see Section 6.
2. Center Numbers

When you log into iLab and go to “My Departments,” you will see the Center Numbers tab in the right hand corner below the search bar.

This is where you assign center numbers to a PI’s Lab. You can only assign center 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 Center Number to your Department**

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

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

- **Number (required):** is the actual center number
- **Name (required):** is the description of the center number.
- **Amount:** is the spending limit for the center number. Please note, currently this limit will be for the center 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 Center Number

PLEASE NOTE – center 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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Owner</th>
<th>Status</th>
<th>Total amount</th>
<th>Expenses</th>
<th>Assign</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1551150011</td>
<td>OCGA Department Test</td>
<td>Center Number</td>
<td>Active</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

You can continue to add the necessary labs in this field box if more than one PI is associated with the center 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.
The two black arrows allow you to transfer the cost center to another VU Department.

![Image showing black arrows and a pop-up window](image)

The red X allows you to inactivate a center number.

![Image showing a center number with an X](image)

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

![Image of the pop-up window with an OK button highlighted](image)

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

**Please Remember** – when center numbers are added to a lab, ONLY the PI will have access to the center number. The Lab Manager and Resource Users will not automatically be given privileges to the center number. The PI, Lab Manager, or Department Administrator must go into the lab and go to “Membership Requests & Center Numbers” tab and check who they would like to have access to each center number assigned to the lab. Please see Section 3 for further guidance.
Section 2a. Center Numbers – Full Financial Integration with Sky VU

As Vanderbilt transitions to its new general ledger, SkyVU, our financial integration with iLab will also be changing. The targeted released date of our full financial integration between iLab and Sky VU is set for the third week of January 2018. As the financial integration changes, so will how we connect our future COAs and POETs to labs within the iLab system.

This section of the DM/DA User Guide will explain this change to the system and will be updated with screenshots and detailed instructions once all elements of the build and testing have been completed. We will notify you in January when updated instructions have been released on our webpage.

Section 2a.1 How to attach a COA or POET to a Lab - Introduction

Currently, a fund number is added manually to the department, and then labs are added to that fund number (aka center numbers). Department Managers/Administrators can add their department’s center numbers, and can add labs from any department to the center number (as shown in Section 2). When we transition to the full financial integration with SkyVU, we will no longer be adding the fund numbers to iLab. Instead, the COAs and POETs will be added to the backend of the system on a nightly basis through an automatic feed. It will be the Department Manager/Administrator’s responsibility to pull the COA or POET strain forward by attaching it directly to the lab(s) within their department(s).

To add a center number to a lab, you will need to go to the lab directly and click on the “Membership Requests & Center Numbers” tab.

Once on this tab, you will click a button to link the COA and/or POET to the lab. If the COA and/or POET needs a to be added to another lab that does not “live” in your department, the DM/DA responsible for that lab will need to do this. This can be done from the lab’s profile, as shown in Section XXXX. Please see Section 2a.2 or Section 2a.3 for explanations of each fund number type.

Section 2a.2 The COA in iLab

The COA will be shown as a strain separated by periods within iLab. Example: 125.05.12520.6745.000.000.0.0

You will need to enter the first four segments of the COA – the entity, net asset class, financial unit and account segments – into the search bar. Once you have selected the COA strain, you will be provided with text boxes to enter the three digit segments for the Program and Activity segments. Once you have entered the two segments for that COA, you will then be able to add the COA strain to the lab.

Section 2a.3 The POET in iLab

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

The POET will be brought in using only the Program 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.
3. Managing a Lab in your Department

Each lab in your department has its own landing page.

a. Membership Requests & Center Numbers – under this tab you can manage all lab membership requests, as well as assign which members have access to each center number.

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

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

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

When you check a box, it will turn green the first time to show you that the change has been saved.
b. **Members** – under this tab you can set the lab thresholds, as well as manage lab memberships.

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

  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**
  
<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emma Pacilli</td>
<td><a href="mailto:emma.pacilli@vanderbilt.edu">emma.pacilli@vanderbilt.edu</a></td>
<td>(615) 875-8154</td>
</tr>
<tr>
<td>Peyton Dept Admin</td>
<td><a href="mailto:peytondeptadmin@vuu.edu">peytondeptadmin@vuu.edu</a></td>
<td></td>
</tr>
</tbody>
</table>
Once you click on it, start typing the name in the search field, and then select the person you are looking for. If the person is not there, that means they do not have an iLab account, and must set one up. They can do this by following the instructions to set up a new account.

The only exception to this is if you are from VU and you are trying to add a person who is from VUMC, or vice versa. If this is the case, please fill out the appropriate form, and we will have the person added to the lab by iLab.

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

They can be either a:

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

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

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

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

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

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

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

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

When you click on this link, it will show all expired members. If you would like to allow an expired member access to your lab again, you can do so by clicking on the pencil icon, and change the end date. Make sure to click “Save” for your changes to be saved.
c. **Bulletin Board** – under the Bulletin Board Tab you can see the actions done with the lab.

![Bulletin Board]

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Name</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sep 21 '17</td>
<td>01:19 PM</td>
<td>Emma Pacilli</td>
<td>Emma Pacilli added Sheena Adams-avery to join group: OCGA Test (VU) Lab.</td>
</tr>
<tr>
<td>Aug 31 '17</td>
<td>09:58 AM</td>
<td>Emma Pacilli</td>
<td>Emma Pacilli added Jay Holman to join group: OCGA Test (VU) Lab.</td>
</tr>
<tr>
<td>Aug 31 '17</td>
<td>09:57 AM</td>
<td>Emma Pacilli</td>
<td>Emma Pacilli added Jody May to join group: OCGA Test (VU) Lab.</td>
</tr>
</tbody>
</table>

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**

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

**Communication Settings**

- **Lab Primary Contact:** Emma Pacilli
- **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** – 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.

The ![icon](image) icon is where you can click to change the payment information. The pencil indicates that the fund number is not valid, or there is no fund number attached to the request. If the icon has a blue check mark ![icon](image), 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.

- **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.

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.
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.  

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.