

Manual for Core Staff - Equipment/Scheduling Core Facilities

Table of Contents

1. Overview
 2. How do I manage my account?
 3. Equipment Scheduling Workflow Overview
 4. Equipment Scheduling Walk Through
 - a. How do I access the list of calendars available for scheduling?
 - b. How do I reserve time on a piece of equipment?
 - c. How do I email selected equipment users?
 - d. Can users cancel reservations?
 5. Calendar Settings Features
 - e. How do I add or edit Calendars?
 6. Tracking and Billing For Equipment or Resource Usage
 - f. How do I track actual usage?
 - i. How do I manage and confirm resource usage?
 - ii. How do I review and confirm Unconfirmed Usage?
 - iii. What is Confirmed Usage?
 - iv. Are there other ways to adjust actual usage?
 - v. Can I add other charges to reservations?
 - g. How do I bill for confirmed reservations?
 7. What other administrative tools are available?
-

Manual for Core Staff - Equipment/Scheduling Core Facilities

Overview

Introduction

This guide is intended for core managers and staff. We hope it will help guide you during the initial stages of getting to know your iLab implementation. Please feel free to contact iLab if you would like to request additional training or help with questions.

There are several other help resources at your disposal:

Look for the **help icons throughout the system** (). They often provide definitions or guidance on using features.

Hover over system-generated text. Often additional information on the feature you hover over will be provided.

Click on the ***leave iLab feedback*** link in the upper right-hand corner of the screen, or send an email to support@ilabsolutions.com with your question and we will respond as soon as we can. Our team is dedicated to providing you with a timely response to any questions, suggestions or urgent help that you require.

To access the iLab system, follow the login instructions you received with your iLab welcome email.

Please Note:

This manual is intended to assist core personnel in the use of iLab Solutions' core services system. Please keep in mind that due to the continual development of this system, some details discussed in this training manual may have been updated in iLab. Images are for illustrative purposes, and may not reflect the exact configuration of each core's system.

Manual for Core Staff - Equipment/Scheduling Core Facilities

How do I manage my account?

When you log into iLab you will either land on your core's page or you may land on your homepage (*Figure 1*). Here you can view messages, manage your account, manage your support tickets and find lists of cores that you can access through iLab.



Figure 1. Your homepage.

On the left side you will see a link to your homepage (*home*) (*Figure 1.1*) that you can click on to view your homepage and messages sent using the iLab system in the *Home* green menu bar. If your lab also utilizes iLab requisitioning, you will see links on the left side for material management.

Under *core facilities* (*Figure 1.2*) you are provided links to your core's site, to view past and future reservations you have with cores (*my reservations*), you can see requests of services or projects that you have submitted to cores (*view requests*), and you can see a list of cores that you can access (*list all cores*).

Under *manage groups* (*Figure 1.3*) you can view *my labs* to see details about your lab and lab members. If you are a PI or Lab Manager please review [PI + Financial Admin Training Manual](#) for more details about managing your lab settings.

The upper right hand corner provides links for you to view new system upgrades, create support tickets (*leave iLab feedback*), manage your account (*my profile*) and manage support tickets (*support*) (*Figure 1.4*). If you contact us through *leave iLab feedback* you will be sending a message to our entire support team so you can receive our most comprehensive support and track your tickets. You can view the support tickets you have sent by clicking on *support*. You also can view links to general manuals and videos with basic instructions on how to make a request on *Screen Casts* on the *support* page.

In *my profile* you can update your name, log in information, password, and billing and shipping information. You also can view the labs that you are associated with in iLab.

Manual for Core Staff - Equipment/Scheduling Core Facilities

As a core member other menu bars can be seen on your homepage with quick links (Figure 2).

1. Under the *Home* bar you will see messages waiting for your review and other quick links. More help can be viewed under the *help* tab.

2. Any service requests that require the core's attention will be listed under *alert* in the *Service Requests* bar.

3. Any reservations that require approval will be seen under *alerts* under the *Scheduled Events* bar.

Name	Owner	Cost	Status	Action
FDO-BC-WE-180	Waldo Emerson_Test			Begin
FDO-BC-RM-179	Rebekah Mesker			Submit
FDO-BC-TW-179	Testuser Web1	\$25,000.00 (\$25,000.00)	Waiting for Core to Begin	Begin
FDO-BC-DA-183	Darah Arcila	\$0.00 (\$0.00)	Waiting to Submit to Researcher	Submit
FDO-BC-FC-174	Francis Crik	\$0.00 (\$0.00)	Waiting to Submit to Researcher	Submit

Equipment	Owner	When	For How Long	Status	Actions
FACScan FACScan	Francis Crik	Tue, Dec 20 at 09:45 AM	135 minutes	pending	Approve Cancel Delete

©2005 – 2011 iLab Solutions, LLC
myilabsolutions.com | [privacy policy \(pdf\)](#) | [security policy \(pdf\)](#)

Figure 2. As a core staff member, you can manage requests and reservations that require core attention on your homepage.

Under the *Home* panel you will see quick links to messages, recently used cores and possibly purchases if you are using our requisitioning system under the *info* tab (Figure 2.1). Every panel has a *help* tab with additional information.

You may also see a *Service Requests* panel or a *Scheduled Events* panel. Under *Service Requests* you will see requests that require core staff action under *alerts*, or a list of the most recent requests under *info* (Figure 2.2). In the *Schedule Events* panel you can view and approve reservations that required your approval under *alerts* or you can view and manage up and coming reservations under *info* (Figure 2.3).

Equipment Scheduling Workflow Overview

- 1) The *customer* or *core user* logs into iLab.

Manual for Core Staff - Equipment/Scheduling Core Facilities

- 2) The customer then views and reserves time on equipment (core managers can also schedule equipment on behalf of the customer).
- 3) Scheduling equipment may require a form for capturing information about the project.
- 4) The customer uses that equipment at the scheduled time, being sure to log in and out to track actual time used.
- 5) Core manager and staff review the equipment schedule and actual time used (if applicable).
- 6) Core staff can adjust actual usage and confirm usage for billing.
- 7) Core manager bills for the equipment usage.

Manual for Core Staff - Equipment/Scheduling Core Facilities

Equipment Scheduling Walk Through

How do I access the list of calendars available for scheduling?

If there is equipment or resources available that can be reserved, the scheduling module on the core's iLab site will be available. Next to the *About Our Core* tab will be a *Schedule Equipment* tab. When the *Schedule Equipment* tab is open, the list of available equipment/resources and information about the equipment is displayed (Figure 3).

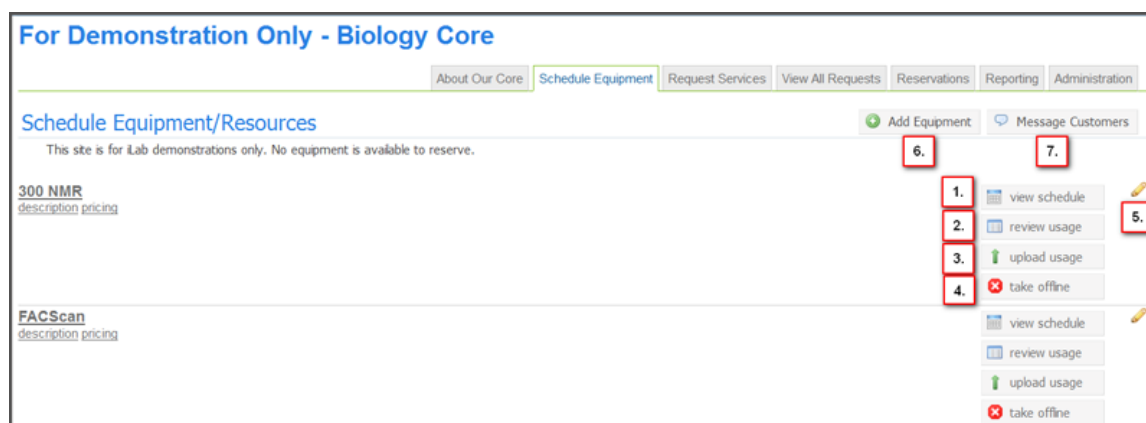



Figure 3. To access the list of calendars available for scheduling, click on the *Schedule Equipment* tab.

In the *Schedule Equipment* tab, the calendar for each piece of equipment can be viewed by clicking on the name of the resource or by clicking on the *view calendar* button to the right of the equipment name (Figure 3. 1). For a detailed description of the equipment calendar, please see [How do I reserve time on a piece of equipment](#) in this manual.

Core staff can also review past equipment reservations to update logged time or confirm usage to send the charge to the billing interface in *review usage* (Figure 3.2) or upload a csv file of a usage log (Figure 3.3). Please see [How do I track actual usage of equipment](#) in the *Administrative Features* section of this manual for further details.

Cores can also make a calendar offline by clicking on *take offline* (Figure 3. 4). This setting is useful when equipment goes down; to temporarily block users from making reservations on the calendar, or for utilizing calendars for internal core use only. Core staff can still access the calendar and make reservations even if it has been taken offline. Core staff can designate how long the calendar will be offline and manually reinstate the calendar back online at any time.

Manual for Core Staff - Equipment/Scheduling Core Facilities

All core staff can edit existing calendar settings by clicking on the pencil edit icon () (Figure 3. 5) and can add new calendars by clicking on the *Add Equipment* button (Figure 3.6). Please see [How do I add or edit equipment](#) in this manual for further details.

Core staff can also send mass emails to equipment users by clicking on the *Message Customers* button (Figure 3.7). Please see more information in [How do I email selected equipment users?](#) in this manual.

How do I reserve time on a piece of equipment?

Core staff can reserve equipment on behalf of a customer. After clicking on the *view calendar* button, the *Schedule* tab will open, displaying the current calendar and availability for the chosen piece of equipment (Figure 4). The equipment scheduling calendar can be displayed in a 'Day', 'Week', or 'Month' view. For calendars with multiple instances for the equipment, these can be compared for availability and scheduling by selecting the *Multi View* viewing tab (Figure 4.1). More equipment details can also be found under the *Description* tab (Figure 4.2). For quick access to other calendars, click on the *Other Equipment* tab (Figure 4.2).

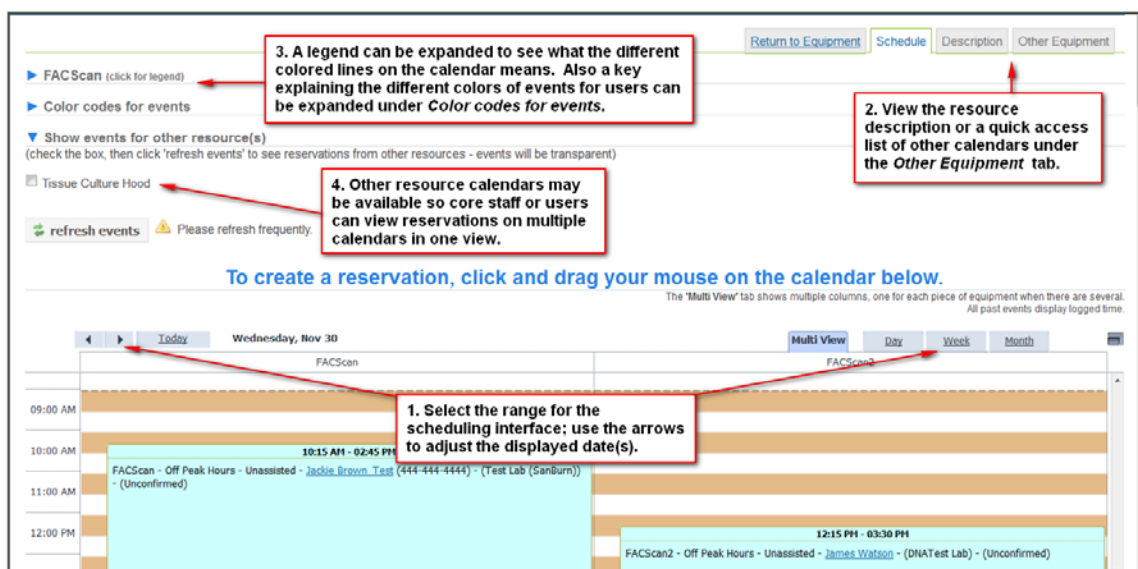


Figure 4. After you click on the calendar of interest you will see the calendar with a legend, key and other tools.

In the scheduling view, different price classes (e.g. assisted versus unassisted use) are defined at the top left-hand side of the calendar under the legend. You can expand the legend by clicking on the blue arrow on the left (Figure 4.3). The legend is a color-coded classification that identifies different access times on the calendar. A customer will only be able to schedule a reservation during hours for which their account allows access. For example, if the customer has been trained for unassisted,

Manual for Core Staff - Equipment/Scheduling Core Facilities

after-hours use of a piece of equipment, they can be granted access for scheduling during the corresponding extended time frame. Administrators will see all price classes and all reservations in scheduling.

A color-coded key for reservations can also be expanded by clicking on the blue arrow for the *Color codes for events* (Figure 4.3). Definitions given are for users to reference as a guide.

You can also have the option to overlay reservations from multiple calendars by clicking on a check box next to available calendars listed under *Show events for other resources* and then clicking *refresh events* (Figure 4.4).

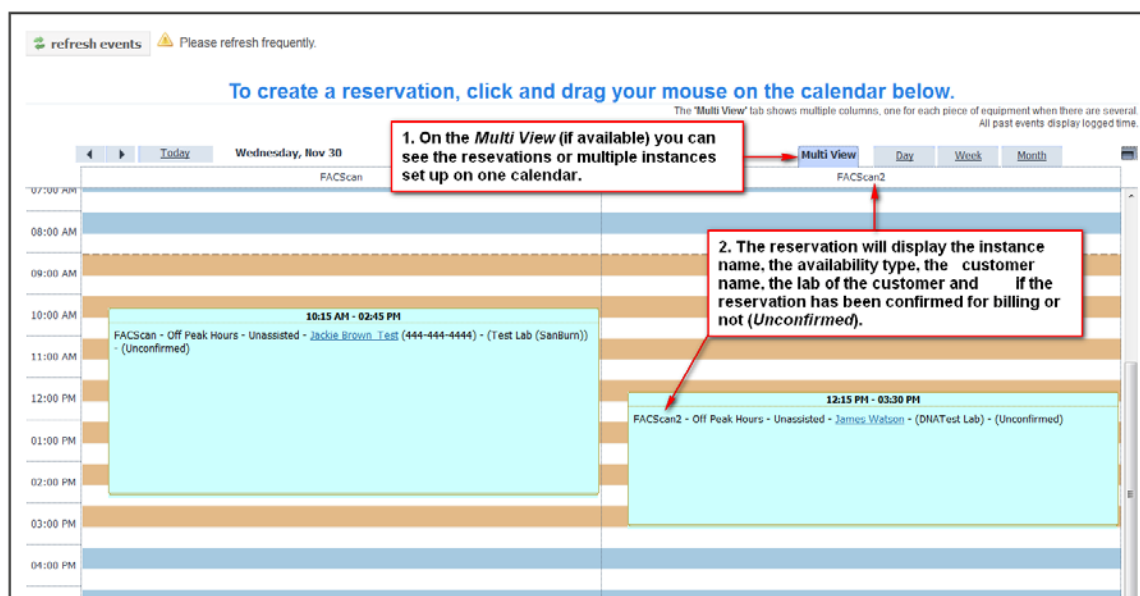


Figure 5. Some calendars may have multiple instances (resources) that can be scheduled from one calendar.

Some calendars are set up so users and/or core staff can schedule multiple resources with the same settings and pricing on one calendar. If this is the case you will see the multiple instances on the *Multi View* tab (Figure 5.1). Concurrent reservations can be made on the multiple instances. Reservations will display the resource instance chosen, availability type, customer name, customer phone number, customer lab, and whether the reservation has been confirmed for billing or not (*Unconfirmed*) (Figure 5.2). You can click on the customer's name if you want to send them an email.

To reserve time on behalf of a customer, click on the desired day and time on the calendar, and drag to the approximate end time. A window will pop up, prompting the core personnel to enter in the customer name for which the reservation is being made. Start to type the name in the *customer* field and, if they have an iLab account, their name will be listed. If their name does not come up in the live search they either do not have access to the core or do not have an account. This dialog

Manual for Core Staff - Equipment/Scheduling Core Facilities

window also allows the core to reserve time when the piece of equipment will be *unavailable*, such as for scheduled maintenance.

The screenshot shows a web-based reservation form titled "event details". At the top, it says "Unsaved reservation - please click **save reservation**." Below this, it shows "FACScan - My Reservation - \$82.50". The form is divided into two main sections: "event details" on the left and "required forms" on the right. In the "event details" section, there is a dropdown menu for "Availability Type:" (1) currently set to "Off Peak Hours - Unassisted \$30.00 (trained users)". Below it is a dropdown for "Specify the required resource:" (2) currently set to "FACScan". To the right of this is a "start" and "end" time selection area with calendar icons (3). Below the times is a "Cost Center" field (4). At the bottom left of the form are "Save Reservation" and "Cancel Changes" buttons. In the "required forms" section, there is a "Project Name:" field, a "Project Due Date:" field (5) set to "October 06, 2011 09:43 A", and a "Project Description:" text area. Below the description area is a "please upload" button and a note "If you prefer please upload a". At the bottom of the window, there is a "comments" section (6) with a red double-headed arrow (7) pointing to an "add a comment" link.

Figure 6. When a reservation is created a window will open for reservation details to be entered.

Once the customer name has been selected, click on *Next* to continue the reservation process. A window opens with event details and any required forms (Figure 6). If the selected customer has access to multiple pricing classes (e.g. for assisted versus unassisted use) for the equipment, the applicable price class can be set for the reservation by selecting from the *Availability Type:* pull-down menu (Figure 6.1). If multiple instances (resources) are available to schedule from one calendar the instance desired can be chosen from the *Specify the required resource:* drop down (Figure 6.2). The scheduled start and end times can be adjusted during the reservation process, using the corresponding calendar buttons on the right of the fields (Figure 6.3). The next field gives a place for users to enter in their payment number for the reservations. This can be set as required or optional and (if your institution has financial integration in place) may display a validated payment number.

On the right side of the window a form can be displayed containing fields for required information for the reservations entered (Figure 6.5). The form input requirements can be set and edited by core administrators. Please see the section on custom forms for further information on how to create and edit forms.

Comments about the reservation can also be made on the form. Click on the *add a comment* link (Figure 6.7) to add a comment. Comments will be tracked under the

Manual for Core Staff - Equipment/Scheduling Core Facilities

comments section on the lower left hand side of the window. The core administrators can choose if they would like the reservation owner or the core contact to receive emails when a comment is added in *Other Settings* under the *Administration* tab.

Once the details of the reservation are completed, click *Save Reservation* (Figure 6.6) to return to the main scheduling window. The new event should now appear on the calendar. Double-click on a reservation to re-open and edit the detailed view of the event.

How do I email selected equipment users?

The screenshot shows the 'Find customers' and 'Send emails' workflow in the iLab Solutions software. Red arrows and boxes highlight key steps: finding customers by date and resource type, selecting customers to email, and sending the email.

1) Find customers

Select date range:
From: March 1, 2011 To: December 31, 2011 OR [this week](#) | [next week](#) | [last week](#) | [this month](#) | [last 30 days](#) | [next 30 days](#)

Select resource(s):

Resource	Select All
300 NMR	<input checked="" type="checkbox"/> 300 NMR
FACScan	<input checked="" type="checkbox"/> FACScan
	<input checked="" type="checkbox"/> FACScan2
Incubator for Staging	<input checked="" type="checkbox"/> Incubator 1
Tissue Culture Hood	<input checked="" type="checkbox"/> Hood 1
	<input checked="" type="checkbox"/> Hood 2
	<input checked="" type="checkbox"/> Hood 3

Find Customers

2) Select customers to email

All	Name	Group(s)	Email	Telephone
<input checked="" type="checkbox"/>	Darah Arcila	Research Specimen Processing 68th Street Test Lab (UTHSCSA) iLab Ordering	darah.arcila@ilabsolutions.com	
<input checked="" type="checkbox"/>	Francis Crik	DNA Test Lab	darah.lacen@ilabsolutions.com	555-555-5678
<input checked="" type="checkbox"/>	Jackie Brown_Test	Test Lab (GIT)	Rebekah.Meskes@ilabsolutions.com	444-444-4444
<input checked="" type="checkbox"/>	James Watson	DNA Test Lab Test Lab (MACTS Wayne)	darah.lacen@ilabsolutions.com	
<input checked="" type="checkbox"/>	Mickey Mouse	Disney Labs	darah.lacen@ilabsolutions.com	
<input checked="" type="checkbox"/>	Testuser MicroPET	MSKCC Test2 Lab	darah.lacen@ilabsolutions.com	555-555-5432
<input checked="" type="checkbox"/>	Testuser Web1	MSKCC Test2 Lab	test_web1@ilabsolutions.com	555-5590
<input checked="" type="checkbox"/>	Testuser Web2	MSKCC Test2 Lab	test_web2@ilabsolutions.com	555-5590
<input checked="" type="checkbox"/>	Waldo Emerson_Test	Test Lab (MACTS Wayne)	jessica.evans@ilabsolutions.com	555-1234
		Test Lab (VPTN Monash)		

3) Send emails

Email title
[Re: For Demonstration Only - Biology Core]

Email body

Send Emails Cancel

Annotations:

- 1. Find the customers you want to email by filtering by date and resource type.
- Click on *Return to Scheduling* to return to the calendars list.
- 2. Select the customers you want to email, enter in the email text then click on *Send Emails*.
- Click on *Return to Scheduling* to return to the calendars list.

Figure 7. You can find a particular user set to email or email all users that have made reservations by filtering by date and resource type then sending the selected users an email.

Manual for Core Staff - Equipment/Scheduling Core Facilities

To email resource users you can click on the *Message Customers* button on the *Scheduling Equipment* page (Figure 3.7). You can search for users to contact by filter for a date range and the resource type (Figure 7.1). Then you can select specific (or all) users to email and send the group an email. This tool is useful if the equipment goes down or a technician is unavailable (Figure 7.2).

Can users cancel reservations?

Core administrators can determine if they want to allow users to cancel a reservation instead of just deleting them. Calendars can be set with lock out settings where users are limited on when they can create, edit or remove reservations. As a core staff member you can determine if you want specific calendars to allow users to cancel reservations during the edit lockout period. This opens the time up for another user to schedule, but allows the core track and even bill for cancelations. Please see [How do I add or edit Calendars?](#) in this manual for details on how to manage lockout settings.

When a user tries to edit or remove a reservation that falls within the lockout settings, they are able to make the modification (Figure 8) but will see on their calendar the cancelled time. The core will also see the cancelled time on the calendar, which shows up as a translucent red reservation (Figure 9). Other users will see that the time has opened and can schedule during that time. More details on how the core can manage and bill for cancelled reservations is under the [How do I review and confirm Unconfirmed Usage?](#) section in this manual.

The screenshot displays the 'event details' section of the iLab Solutions interface. It shows a reservation for 'FACScan - Off Peak Hours - Unassisted - My Reservation' with a scheduled time from December 16, 2011, 01:00 P to 03:30 P. The 'Availability Type' is set to 'Off Peak Hours - Unassisted \$30.00/hr (trained users) (needs approval)'. The 'Specify the required resource' is 'FACScan'. The 'Cost Center' field is present but empty. The 'additional charges for this event' section is also empty. At the bottom, there are buttons for 'Save Reservation', 'Cancel Changes', and 'Cancel Reservation'. Two red callout boxes provide context: one points to the scheduled time range, stating 'The user can edit their reservation during lockout times, opening the time for other users, but the core can still see, track and bill for the original reserved time.' The other points to the 'Cancel Reservation' button, stating 'Instead of blocking the user from removing and event during lockout hours, the user can cancel their reservation which opens the time for someone else to schedule but tracks the original reservation for reporting and billing purposes.'

Figure 8. With the reservation cancelation setting on, users can choose to cancel a reservation during the calendar lockout period.

Manual for Core Staff - Equipment/Scheduling Core Facilities

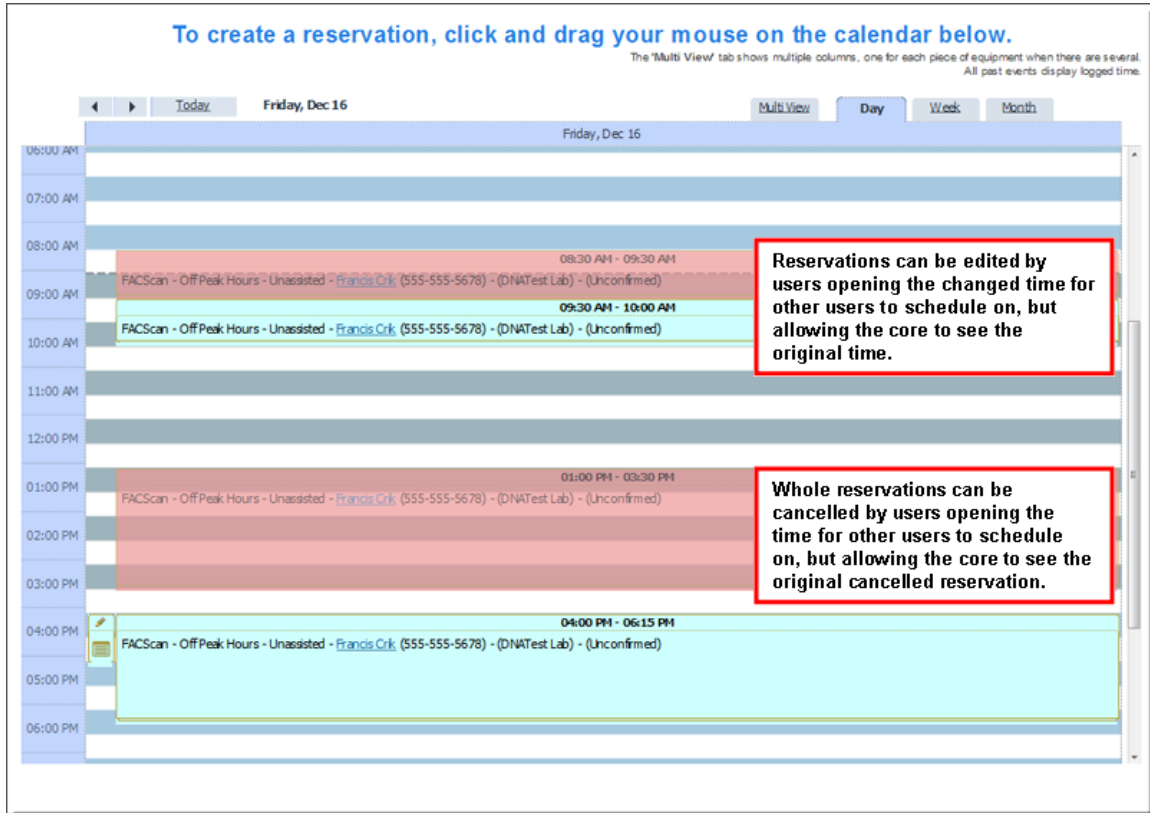



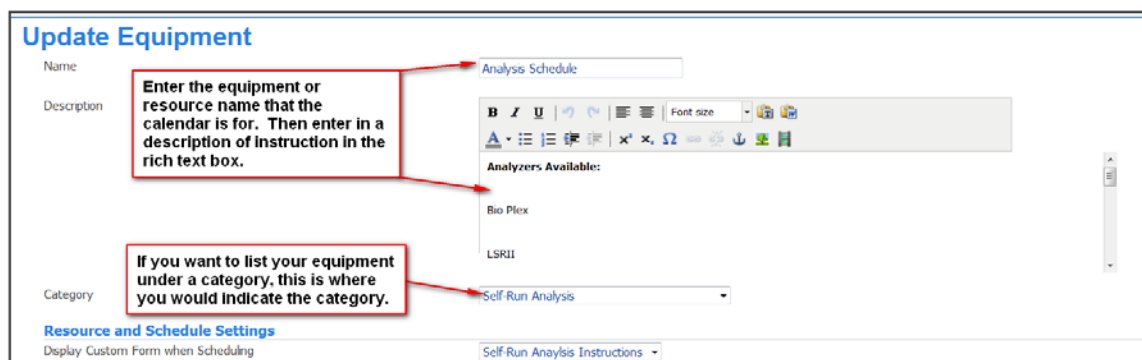
Figure 9. When a user edits or cancels a reservation during a lockout period, the core will see the original reservation on the calendar as a transparent red reservation.

Manual for Core Staff - Equipment/Scheduling Core Facilities

Calendar Settings Features

How do I add or edit Calendars?

In the *Schedule Equipment* tab, new calendars can be added or existing calendars can be edited by core members by clicking on the *Add Equipment* button (Figure 3.5) or the edit icon () to the right of the calendar name (Figure 3.6).



The screenshot shows the 'Update Equipment' form. It has fields for 'Name', 'Description', and 'Category'. The 'Name' field contains 'Analysis Schedule'. The 'Description' field is a rich text editor with a toolbar. The 'Category' field is a dropdown menu with 'Self-Run Analysis' selected. There are two red callout boxes with arrows pointing to the form:

- One box points to the 'Name' and 'Description' fields with the text: "Enter the equipment or resource name that the calendar is for. Then enter in a description of instruction in the rich text box."
- Another box points to the 'Category' dropdown with the text: "If you want to list your equipment under a category, this is where you would indicate the category."

At the bottom, there is a section titled 'Resource and Schedule Settings' with a checkbox 'Display Custom Form when Scheduling' and a dropdown 'Self-Run Analysis Instructions'.

Figure 10. In *Update Equipment*, you can enter in the name of the calendar, add a description and categorize the calendar.

General information can be entered in the *Description* field (Figure 10) of the *Create Equipment for Scheduling* or *Update Equipment* window. Information entered in this section will be viewed under the equipment name on the *Schedule Equipment* tab, as well as under the *Description* tab for that piece of equipment in the *Scheduling* window (Figure 4.2).

If you want your equipment to be listed under categories you can indicate the category in the *Category* drop down (Figure 10)

Manual for Core Staff - Equipment/Scheduling Core Facilities

Category: Self-Run Analysis

Resource and Schedule Settings

Display Custom Form when Scheduling

Customer Instructions for Availability

1. Self-Run Analysis Instructions

2. When customers are scheduling a reservation they may have a number of **Availability Types** to choose from. You can add instructions to guide them in which availability to choose or add other information.

Customer Instructions for Add-on Charges

3. Core staff can choose if they want to be able to add charges onto reservations and if they want to allow users to do the same. You can include instructions or information for adding charges here.

Minimum Time: 30 minutes

Maximum Time: 480 minutes

Time Step: 30 minutes

4. Determine time step settings for the calendar and how the calendar will be displayed.

Scale Hour on Schedule? ☒

Default to resource or day view? no

5. Send users reservation reminders! Send reminder e-mails for reservations? Do not send

User Settings

Let Users see reservation owners? no

Figure 11. In the calendar settings you have an area where you can provide more information and options to your users when they are making reservations.

Select a **custom form** from the drop-down menu (*Figure 11*) to associate it with the equipment calendar. Users will see the form when they are making a reservation and can be required to fill it out. For more information on editing the form, Please review the *How do I create and edit Custom Forms?* section in this [linked](#) manual.

User Settings

Let Users see reservation owners? no

Let Users adjust actual usage? ☒

Let Public see reservation owners? no

Let Users create reservations? yes

Let Users assign reservations to a service project? no

Let Users add charges to reservations? no

Do reservations require core approval? no

View linked resources on schedule? ☒

Assisted Sorting Schedule ☒

Assisted Analysis Schedule ☒

Self-Run Sorting Schedule ☒

1. Under **User Settings** you can control what your users are able to do on the calendar.

2. You can also decide which reservations require approval and choose other calendar reservations that could be seen in one view by linking resources.

Lockout Rules

Create lockout: 0 hours

Edit lockout: 0 hours

Users can cancel during edit lockout: no

How far in advance can people reserve? 365 days

3. **Lockout Rules** help you control when users can create, edit, remove and cancel reservations.

Price Classes

Figure 12. Control user settings and reservation lockout rules for a specific calendar.

Under *User Settings* in the *Update Equipment* page (*Figure 12.1*) you can manage what your users can see and do on the calendar.

Manual for Core Staff - Equipment/Scheduling Core Facilities

If you want core users to see who has made other reservations on the calendar, mark *yes* for *Let Users see reservation owners?*

Let Users adjust actual usage? allows users to adjust reservations that have been made in the past by checking the box.

Let Public see reservation owners? is functionality that is now obsolete and has been deactivated.

Let Users create reservations? can be changed to *no* if you want the calendar to be read-only for users.

Let Users assign reservations to a service project? allows users to make reservations and tie them to a service request they have made from the *Request Services* tab. Users will only see requests that are processing and have been agreed to and started by the core. Any reservations that have been tied to the service request will be listed on the service request.

Let Users add charges to reservations? can be set to *yes* if you want your users to add additional service charges to reservations on top of the hourly rate.

You also have the ability to decide which price class and availability type will require approvals when users create a reservation (*Figure 12.2*). You can set the setting to approvals are required to *no* availabilities, *For all availabilities* or for *Only selected availabilities*. You may want to use the *Only selected availabilities* setting if you require approvals for some reservation types but not others. For example if you want Assisted Use to require core approval but not Unassisted Use.

You can also choose to link calendars in the *User Settings* section (*Figure 12.2*). After you have created all of the calendars you can go back into the calendar edit and click on *View linked resources on schedule?* A list of all calendars will appear. Click on the calendars you would like to allow users and core staff to view from the calendar you are editing. You have to add the link to resources in all of the calendar edits that you want to be able to view other calendar views on.

Lockout Rules (*Figure 12.3*) restrict when a reservation can be generated and changed. *Create lockout* is the setting that regulates how many hours in advance a new reservation must be made. The *Edit lockout* restricts how many hours in advance an existing reservation may be changed or removed. There is also an option to limit how far in advance users can reserve time on the equipment in this section.

Users can cancel during edit lockout: (*Figure 12.3*) allows your users to cancel reservations instead of remove them. This functionality allows users to edit and cancel reservations that are within the *Edit Lockout* while enabling the original reservation to still be seen by the core for reporting and billing if desired.

Manual for Core Staff - Equipment/Scheduling Core Facilities

Price Classes

[add](#)

Name
Off Peak Hours - Unassisted

Name
Peak Hours - Assisted

Name
Peak Hours - Unassisted

Internal 30
External 37
Corporate 45
Internal 45
External 60
Corporate 75
Internal 30
External 37
Corporate 45

Trained Users

Link to Training Request ☒

Differentiate between trained and untrained users:
This resource is **only available** for trained users:

Trained users:

2. You can block some reservation availability types to only be accessible to trained users. Add your trained users to each calendar to give them access to the availability type and price.

1. Price Classes allow you to give different hourly rates for different kinds of reservations available on one calendar.

Name	Email	Phone
Francis Crik	darah.lacer@ilabsolutions.com	555-555-5678

Add a trained user:
Francis Crik

1 results for Francis Crik:

Name	Email	Add
Francis Crik	darah.lacer@ilabsolutions.com	Add as trained

[Availability](#)

Figure 13. Manage settings to determine different price rates for different reservations and who may have access to specific rates using Trained Users settings.

Pricing and equipment availability can be changed for different hours of operation as well as for different users' access. Some cores have equipment available 24 hours a day and charge differently for peak hours and off peak hours. The *Price Classes* section (Figure 13.1) and the *Availability* section (Figure 14.1) allow for pricing and hours of availability control.

Preferences can be set in the *Trained Users* section (Figure 13.2). The core may wish to offer a different price class and availability for unassisted equipment use to trained user, as described above. People currently trained for this equipment are listed under this section. To remove a person from the list of trained users, click the red X icon beside the name.

To approve people as trained to use the equipment, type their name in the *Add a trained user:* field, and click the arrow icon to the right of the field to search iLab user accounts. Results will be listed below the field; click the *Add as trained* button to the right of the desired name.

Manual for Core Staff - Equipment/Scheduling Core Facilities

Availability

General availability: [add](#)

class: ☐ Su ☒ Mo ☒ Tu ☒ We ☒ Th ☒ Fr ☐ Sa ☒

Reservations need to be approved: ☒

start hour:

Availability for trained users: [add](#)

class: ☐ Su ☒ Mo ☒ Tu ☒ We ☒ Th ☒ Fr ☒ Sa ☒

Reservations need to be approved: ☐

class: ☐ Su ☒ Mo ☒ Tu ☒ We ☒ Th ☒ Fr ☒ Sa ☒

Reservations need to be approved: ☒

start hour: end hour:

Instances

[add](#)

Name	FACScan
Name	FACScan2

Remove this piece of equipment

Clicking the below button will remove this piece of equipment. Please proceed with caution.

Figure 14. Set availability types and also a number of resources (instances) available on one calendar.

You can use availabilities (*Figure 14.1*) to set peak usage hours, off peak hours, assisted usage, trained user usage, and other designations that you want to set a time and/or price for using *Price Classes* (*Figure 13.1*). *Availability for trained users:* allows you to set availabilities that can only be reserved by users you add to the *Trained User* list (*Figure 13.2*). You can also indicate the availability types that you want to require core approval when users reserve time with those availabilities.

The *Instances* section (*Figure 14.2*) enables scheduling of multiple instances of the same equipment or resource (e.g. three confocal microscopes) on calendars that will always be viewable along side each other. The instance name will display on the *Equipment* calendar in the *Scheduling* window *Multi View* (*Figure 5.1*). Click the *add* link on the left of the *Instances* section (*Figure 14.2*) for each additional instance, and then enter a unique name. For example: *Computer Workstation 1*, *Computer Workstation 2*. Multiple instances (shown in the *Equipment* calendar *Multi View* (*Figure 5.1*)) enable customers to schedule concurrent events on the discreet instances.

Manual for Core Staff - Equipment/Scheduling Core Facilities

Important: Do not delete all Instances for a single calendar. Each calendar must have at least one instance specified.

Tracking and Billing For Equipment or Resource Usage

How do I track actual usage?

There are several ways to track actual usage on equipment. When creating or editing equipment for scheduling, core staff can choose to allow the customer to alter actual usage (*Figure 12.1*). In most cases, the core will review and adjust the actual usage for the resource. To the far right of the equipment name in the *Schedule Equipment* tab click the *review usage* button (*Figure 3.2*) to open the *Confirm Usage* window (*Figure 15*).

Manual for Core Staff - Equipment/Scheduling Core Facilities

Confirm Usage

November 16, 2011
to December 16, 2011
filter dates

After clicking on the *review usage* button to the right of an equipment name, the *Confirm Usage* window will open with the *Unconfirmed Usage* defaulted to open.

FACScan

Return to Equipment
Upload Actual Usage
Unconfirmed Usage
Confirmed Usage

date	person/lab	start	end	payment info	all
Wednesday, November 30 on FACScan2	James Watson DNATest Lab Add a note: <div>Select existing project</div>	scheduled: 12:15 PM 03:30 PM logged: 12:15 PM 03:15 PM billable: 12:15 PM 03:15 PM 3.0 hrs	no charge: <input type="checkbox"/> Core	Off Peak Hours - Unassisted \$30.00 (trained) Total Price: Cost Center (Put in payment expiration information) \$90.0 sample12	<input type="checkbox"/>
Wednesday, November 30 on FACScan	Francis Crik DNATest Lab Add a note: <div>Select existing project</div>	scheduled: 04:00 PM 04:30 PM logged: 04:00 PM 05:30 PM billable: 4:00 PM 5:30 PM 1.5 hrs	no charge: <input type="checkbox"/> Log matched	Off Peak Hours - Unassisted \$30.00 (trained) Total Price: Cost Center (Put in payment expiration information) \$45 sample12	<input type="checkbox"/>
Friday, December 16 on FACScan Cancelled by user!	Francis Crik DNATest Lab Add a note: <div>Select existing project</div>	scheduled: 08:30 AM 09:30 AM logged: 09:30 AM 10:00 AM billable: 09:30 AM 10:00 AM 0.5 hrs	no charge: <input type="checkbox"/> N/A	Off Peak Hours - Unassisted \$30.00 (trained) Total Price: Cost Center (Put in payment expiration information) \$15.0 payment	<input type="checkbox"/>
Friday, December 16 on FACScan	Francis Crik DNATest Lab Add a note: <div>Select existing project</div>	scheduled: 09:30 AM 10:00 AM logged: 09:30 AM 10:00 AM billable: 09:30 AM 10:00 AM 0.5 hrs	no charge: <input type="checkbox"/>	Off Peak Hours - Unassisted \$30.00 (trained) Total Price: Cost Center (Put in payment expiration information) \$15.0 payment	<input type="checkbox"/>
Friday, December 16 on FACScan Cancelled by user!	Francis Crik DNATest Lab Add a note: <div>Select existing project</div>	scheduled: 01:00 PM 03:30 PM logged: 01:00 PM 03:30 PM billable: 01:00 PM 03:30 PM 2.5 hrs	no charge: <input type="checkbox"/>	Off Peak Hours - Unassisted \$30.00 (trained) Total Price: Cost Center (Put in payment expiration information) \$75.0 payemnt	<input type="checkbox"/>
Friday, December 16 on FACScan	Francis Crik DNATest Lab Add a note: <div>Select existing project</div>	scheduled: 04:00 PM 06:15 PM logged: 04:00 PM 06:15 PM billable: 04:00 PM 06:15 PM 2.25 hrs	no charge: <input type="checkbox"/>	Off Peak Hours - Unassisted \$30.00 (trained) Total Price: Cost Center (Put in payment expiration information) \$67.5 payment	<input type="checkbox"/>

Set selected to scheduled
Set selected to logged
Set selected to maximum time

delete all checked
confirm all checked

Figure 15. To manage actual usage and get the charges ready for billing, click on review usage to access the Unconfirmed Usage tab.

How do I manage and confirm resource usage?

The *Confirm Usage* window provides a four-tab interface to manage the review of usage (Figure 15-Figure 18). By default it should land with the *Unconfirmed Usage* tab open (Figure 15). Until an event has been reviewed by the core and confirmed for usage, it will remain in the list under this tab.

A typical workflow would be for the core technician that is in charge of the particular equipment to review an event in this tab, and then confirm the usage once billable time and pricing has been reviewed. Confirmation will move an event to the *Confirmed Usage* tab, where it becomes ready to add to a billing event.

Manual for Core Staff - Equipment/Scheduling Core Facilities

How do I review and confirm Unconfirmed Usage?

In the *Unconfirmed Usage* tab (Figure 15), authorized core personnel can review details of an event, comparing *scheduled* time to *logged* time. Adjustments can be made to several fields prior to confirming the billable time for an event.

Confirm Usage

1. Select the dates in which the reservations have occurred that you want to view. Click on *filter dates* to apply the selected dates.

2. Add additional information for charge line items for invoices and billing.

3. Assign the reservations to an existing service request.

4. Adjust billable time. Scheduled time or logged time can be billed, indicated by purple.

5. Adjust the reservation type and hourly rate charged.

6. Bill for cancelled reservations.

7. Add additional charges to a reservation.

8. Adjusts billable charges in batches. Click on the check box then click on the desired setting.

9. Confirm reservations to send the charges to the billing interface.

date	start	end	payment info
Wednesday, November 30 on FACScan	12:15 PM	03:30 PM	no charge: Off Peak Hours - Unassisted \$30.00 (trained)
Wednesday, November 30 on FACScan	12:15 PM	03:15 PM	logged: 12:15 PM 03:15 PM Core
Wednesday, November 30 on FACScan	12:15 PM	03:15 PM	billable: 12:15 PM 03:15 PM 3.0 hrs
Wednesday, November 30 on FACScan	04:00 PM	04:30 PM	logged: 04:00 PM 05:30 PM Log match
Wednesday, November 30 on FACScan	04:00 PM	05:30 PM	billable: 4:00 PM 5:30 PM 1.5 hrs
Friday, December 16 on FACScan	09:30 AM	10:00 AM	logged: 09:30 AM 10:00 AM N/A
Friday, December 16 on FACScan	09:30 AM	10:00 AM	billable: 09:30 AM 10:00 AM 0.5 hrs
Friday, December 16 on FACScan	01:00 PM	03:30 PM	logged: 01:00 PM 03:30 PM
Friday, December 16 on FACScan	04:00 PM	06:15 PM	logged: 04:00 PM 06:15 PM

Figure 16. View and manage past reservations in the *Unconfirmed Usage* tab.

- 1) Use the date filtering panel to limit the range of events displayed and to target a specific timeframe of interest (Figure 16.1). Broaden the filter dates to see more events with unconfirmed usage.

Tip: If you do not see the reservation you are looking for, remember to check the date range in the filter!

- 2) The core administrator can turn on a setting where custom text can be added

Manual for Core Staff - Equipment/Scheduling Core Facilities

to the charge line item for the reservations that will be seen in reporting and billing (*Figure 16.2*). For more information contact support@ilabsolutions.com.

3) Assign the reservation to service requests in process by clicking on the pull-down menu and choosing the service ID desired (*Figure 16.3*).

Tip: If you do not see the project that you are looking for, navigate to the *View All Requests* tab and make sure the project request is set to a status of *processing*.

4) The middle columns for the *Unconfirmed Usage* tab track the scheduled, logged, and billable start and end time for an event. Purple highlighting indicates from which source the billable time is currently derived: scheduled or logged (*Figure 16.3*). To update the source for an event start or end time, simply click on the appropriate field and the highlight color will move to reflect the new source time.


The current billable details for an event display in bold across the same line: billable start and end time, total billable time (in hours), and total price for the event (*Figure 17*). The details will update to reflect adjustments to the time or price class.

To modify the logged start or end time for an event, click the blue-highlighted *adjust* button to the right of the logged times (*Figure 17.1*). A *Logged Time* editing panel will open to the left of the button (*Figure 17.2*). Be sure to click the arrow button in the bottom right-hand corner of the panel to save any adjustments to the logged time made in this panel.

5) In the *payment info* column, review the price class assigned to an event. If necessary, update this information by clicking open the pull-down list and selecting the appropriate price class (*Figure 16.5*). The *Total Price* will update to reflect any pricing change made here.

A payment number may be added or edited for the event in the field beneath the price class.

6) If you have turned on the option to allow users to cancel reservations, you will see the cancelled time and can bill for it (*Figure 16.6*).

7) If the core administrator has turned on the ability to add charges to reservations, you will see a plus icon () next to the price. You can add an additional charge here (*Figure 16.7*).

8) Check or uncheck event records individually by clicking the corresponding checkbox to the far right of an event (*Figure 16.8*). Alternatively, to process larger batches of records, use the *all* checkbox at the top of the right-hand

Manual for Core Staff - Equipment/Scheduling Core Facilities

checkbox column to simultaneously select or deselect all events on the page. Once a batch is selected, choose from the actions at the bottom of the page to determine which time should be used for billing.

Set selected to scheduled: This button will change all selected events to base billable time on the scheduled time.

Set selected to logged: This button will change all selected events to base billable time on the logged time.

Set selected to maximum time: - This button will change all selected events to choose the earliest start time and latest end time, from the scheduled and logged, in order to generate the maximum billable time.

9) Once all details have been reviewed and adjusted as needed, a usage event can be confirmed either individually or in batches. Confirming usage will move an event from the *Unconfirmed Usage* tab to the list of *Confirmed Usage* on the next tab. The lists of events will auto-refresh to reflect confirmation of usage.

To manually confirm a specific event, click the blue-highlighted *confirm* button, between the total billable time and total price (*Figure 17.3*).

To confirm a batch of events, select the checkbox at the far right of each specific event, then click the *confirm all checked* button on the bottom of the page (*Figure 16.9*).

Manual for Core Staff - Equipment/Scheduling Core Facilities

BD FACScans

[Return to Equipment](#) [Upload Actual Usage](#) [Unconfirmed Usage](#) [Confirmed Usage](#)

date	person/lab	start	end	payment info	all
Wednesday, December 15	Franz Schubert Brahms, J - Lab (DFCI) MCC-FS-8	scheduled 11:15 AM 12:00 PM	no charge: <input type="checkbox"/> Work Hours (assisted) \$65.00	<input type="checkbox"/>	
		logged 11:15 AM 12:00 PM	adjust Total Price: internal payment	<input type="checkbox"/>	
		billable 11:15 AM 12:00 PM 0.75 hrs	confirm \$48.75	<input type="checkbox"/>	✗
Saturday, December 18	Franz Schubert Brahms, J - Lab (DFCI)	scheduled 04:15 PM 07:45 PM	no charge: <input type="checkbox"/> After Hours \$35.00 (trained)	<input type="checkbox"/>	
		logged	adjust Total Price: internal payment	<input type="checkbox"/>	
		billable	confirm \$122.5	<input type="checkbox"/>	✗
Thursday, December 22		start end	charge: <input type="checkbox"/> After Hours \$35.00 (trained)	<input type="checkbox"/>	
		billable 06:15 AM 08:00 AM 1.75 hrs	confirm \$61.25	<input type="checkbox"/>	✗
Friday, December 24	Franz Schubert Brahms, J - Lab (DFCI) Select existing project	scheduled 09:45 AM 12:15 PM	no charge: <input type="checkbox"/> Work Hours (assisted) \$65.00	<input type="checkbox"/>	
		logged 09:45 AM 12:15 PM	adjust Total Price: internal payment	<input type="checkbox"/>	
		billable 09:45 AM 12:15 PM 2.5 hrs	confirm \$162.5	<input type="checkbox"/>	✗
Monday, December 27	Andreas Hagen Aquatic Resources Group	scheduled 09:30 AM 12:00 PM	no charge: <input type="checkbox"/> Work Hours (unassisted) \$45.00	<input type="checkbox"/>	
		logged 09:30 AM 11:30 AM	adjust Total Price: external payment	<input type="checkbox"/>	
		billable 09:30 AM 12:00 PM 2.5 hrs	confirm \$112.5	<input type="checkbox"/>	✗

1. Click 'adjust' to open the 'Logged Time' editing panel; make changes to logged start and end times.

2. Click to save changes to 'Logged Time' and close panel.

3. Click 'confirm' to save details of individual event and move to 'Confirmed Usage'

Set selected to scheduled
Set selected to logged
Set selected to maximum time

confirm all checked

Figure 17. You can adjust actual usage and confirm the reservation.

What is Confirmed Usage?

In the *Confirm Usage* window, events which have been confirmed by the core will move to the *Confirmed Usage* tab ready to be billed (Figure 18). Once a scheduling event has been included in a billing event, it will be removed from the *Confirmed Usage* list.

Manual for Core Staff - Equipment/Scheduling Core Facilities

Confirm Usage

December 14, 2010

to

December 28, 2010

filter dates

BD FAC Scans

[Return to Equipment](#)
[Upload Actual Usage](#)
[Unconfirmed Usage](#)
[Confirmed Usage](#)

date	person/lab	start	end	payment info
Wednesday, December 15	Franz Schubert Brahms, J - Lab (DFCI) MCC-FS-8	scheduled	09:45 AM 11:15 AM	no charge: <input type="checkbox"/> Work Hours (assisted) \$65.00
		logged	09:45 AM 11:15 AM Log matched adjust	Total Price: internal payment
		billable	09:30 AM 11:00 AM 1.5 hrs update	\$97.5 0
Wednesday, December 15	Franz Schubert Brahms, J - Lab (DFCI) MCC-FS-20	scheduled	02:45 PM 03:15 PM	no charge: <input type="checkbox"/> Work Hours (unassisted) \$45.00
		logged	02:45 PM 03:00 PM N/A adjust	Total Price: internal payment
		billable	02:45 PM 03:15 PM 0.5 hrs update	\$22.5 0
Friday, December 17	Franz Schubert Brahms, J - Lab (DFCI) ISBV-FS-11	scheduled	01:45 PM 03:30 PM	no charge: <input type="checkbox"/> Work Hours (assisted) \$65.00
		logged	01:45 PM 03:30 PM adjust	Total Price: internal payment
		billable	01:45 PM 03:30 PM 1.75 hrs update	\$113.75 0

Figure 18. Once you have confirmed the reservations, they will be listed under the Confirmed Usage tab.

Are there other ways to adjust actual usage?

Uploading actual usage logs is an alternative to adjusting logged time in the *Unconfirmed Usage* tab. Open the *Upload Actual Usage* tab (Figure 15.1) to access this feature. A template is available to download (Figure 19.2) and then re-upload for submission. Choose the desired charge creation method: match times in the file against the equipment's schedule; or create new reservations and charges, regardless of the schedule (Figure 19.3).

Note: The same upload usage functionality is also accessible from the Equipment page (Figure 3.3).

Manual for Core Staff - Equipment/Scheduling Core Facilities

Confirm Usage

November 16, 2011 to December 16, 2011 filter dates

FACScan

Upload Actual Usage

Download the [template](#) then re-upload

Charge Creation Method

☐ Match times in file against schedule

☒ Create new reservations and charges, regardless of schedule

Log type

☐ Equipment log

☒ iLab Format

CSV File

Browse...

Submit Query

Return to Equipment Upload Actual Usage Unconfirmed Usage Confirmed Usage

1. In the *Confirm Usage* window, there is also the *Upload Actual Usage* tab where you can upload usage logs.

2. A template for the upload usage is provided.

3. Choose to match current reservations in the calendar or to just upload the log. You can upload the filled in template or an equipment log.

Figure 19. Upload a csv usage log file for review to bill.

Figure 20 is an example of a filled in usage log from the provided template. Below are some pointers on filling out the usage log.

1. To upload usage the user must have an iLab account.
2. The *Equipment Name* is the instance that they used; so if you have multiple microscopes on one calendar, you can indicate which microscope was used.
3. You must enter in the start date and time in the same column. Times can be entered in military time or you can indicate the time of day by adding *AM* or *PM* next to the time.
4. Save the file as a CSV file.
5. Make sure your start date and time are before your end date and time.
6. Make sure there are no spaces before or after what you typed in each cell.
7. If your usage log is not a csv, gives the date and time in separate columns, or if you run into any questions, please contact support@ilabsolutions.com for assistance.

	A	B	C	D	E	F
1	*Customer Name	PI Last Name	*Equipment Name	Payment Number (PO/Project/Grant)	Start Date & Time	End Date & Time
2	Francis Crik	Crik	FACScan2	1234566	11/24/2011 12:00	11/24/2011 15:30
3	Francis Crik	Crik	FACScan		11/24/2011 17:00	11/24/2011 23:59
4	Francis Crik	Crik	FACScan2		11/29/2011 9:00	11/29/2011 13:59

Figure 20. Above is an example of a log file that can be uploaded for actual equipment usage

Once you have uploaded the usage log the reservations will be added to the *Unconfirmed Usage* tab indicated by a grey tab and the log time will be highlighted with a red *Log only* (Figure 21.1).

Manual for Core Staff - Equipment/Scheduling Core Facilities

Confirm Usage

November 08, 2011

1. Reservations that have been uploaded are flagged with a grey tab and indicates that the log time is from the Log only,

Return to Equipment Upload Actual Usage Unconfirmed Usage Confirmed Usage

person/lab sta

Francis Crik DNA Test Lab 12

no charge: Off Peak Hours - Unassisted \$30.00 (trained)

Thursday, November 24 on FACScan2

James Watson DNA Test Lab

no charge: Peak Hours - Assisted \$45.00

Thursday, November 24 on FACScan

Francis Crik DNA Test Lab

no charge: Off Peak Hours - Unassisted \$30.00 (trained)

Tuesday, November 29 on FACScan2

Francis Crik DNA Test Lab

no charge: Peak Hours - Assisted \$45.00

Tuesday, November 29 on FACScan2

Francis Crik DNA Test Lab

no charge: Peak Hours - Assisted \$45.00

2. Drag and drop the usage from the log onto the scheduled reservation.

person/lab	sta	scheduled	logged	billable	Log only	adjust	confirm	Total Price	Cost Center (Put in payment expiration information)
Francis Crik DNA Test Lab	12	12:00 AM 08:00 AM	12:00 AM 08:00 AM	8.0 hrs				\$240.0	
James Watson DNA Test Lab		12:15 PM 03:30 PM	12:15 PM 03:30 PM	3.25 hrs				\$146.25	1234566
Francis Crik DNA Test Lab		05:00 PM 11:59 PM	05:00 PM 11:59 PM	6.98 hrs				\$209.5	
Francis Crik DNA Test Lab		09:00 AM 01:30 PM	09:00 AM 01:30 PM	4.5 hrs				\$157.5	
Francis Crik DNA Test Lab		09:00 AM 01:59 PM	09:00 AM 01:59 PM	187.02 hrs				\$5610.5	

Figure 21. In the Unconfirmed Usage tab you will see the reservations from the uploaded usage log.

If the uploaded time is near the same time as the scheduled time it will populate next to the scheduled time. To indicate in the system that the logged time was the actual usage of the same event, click on the usage log row and drag it over the scheduled reservation (*Figure 21.2*).

Editing a past event in the calendar interface is an additional method to review scheduled, logged, and billable time for a usage event. Double-click on a past event in the equipment schedule; the same way a reservation can be opened to edit event details. The event detail view will pop open to show the same form content as for a reservation (*Figure 22*). The addition of fields for *logged* and *billable* start and end times is the primary difference. Through this scheduling interface, authorized core members may also review and adjust the actual and billable usage time. Click on *Save & Confirm Usage* to confirm the charge and send it to the billing interface. Or click on *Save Reservation* to just save the changes made.

Tip: If you click on *Save & Confirm Usage* you will not be able to modify the reservation later.


Manual for Core Staff - Equipment/Scheduling Core Facilities

event details

FACScan - Off Peak Hours - Unassisted - [Francis Crik](#) (555-555-5678) - (DNATest Lab) - (Unconfirmed)

A description for Availability types can be seen here.


Availability Type:
Off Peak Hours - Unassisted \$30.00/hr (trained users) (needs a)

Specify the required resource :
FACScan

start

scheduled: December 16, 2011 09:30:00 AM

logged: December 16, 2011 09:30:00 AM

billable: December 16, 2011 09:30 

end

December 16, 2011 10:00:00 AM

December 16, 2011 11:00:00 AM [edit](#)

Cost Center (Put in payment expiration info on)
payme

Assign to
Select

Instructions for add on charges can be seen here.

additional charges for this event:

comments

Dec 15 '11 05:54 PM [Darah Arcila](#) said
Your reservation has been approved on FACScan (FACScan)

Click on *edit* to edit the logged or billable time for the reservation.

Click on calendar icon next to the *start* or *end* field to open a calendar to edit the day and/or time of the reservation.

S	M	T	W	T	F	S
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

@ 10 AM : 00 Now OK

December 16, 2011 10:00 AM

+ add-on

Save & Confirm Usage Save Reservation Cancel Changes

Figure 22. You can open a past reservation and edit the logged and/or the billable time for that reservation.

Can I add other charges to reservations?

There may be some cases when you would like to apply additional charges to a reservation. For example if the user scheduled unassisted usage but the tech spent part of the time with the user or if the user broke glassware while working on the equipment. The core administrator can turn on the ability to allow core staff to add charges to reservations in the *Other Settings* panel under *Administration* (Figure 23).

Tip: Charges added must be on the core service list.

Manual for Core Staff - Equipment/Scheduling Core Facilities

Activate Advanced Modules & Features

☐ Include Daily Billing interface? ⓘ

☒ Include Scheduling Module ⓘ

☒ Integrate Sample Management ⓘ

☒ Allow back-dating of service requests? ⓘ

☒ Allow add-ons for charges? ⓘ

☒ Allow charges attached to reservations? ⓘ

☐ Require customers to complete all required fields in my forms? ⓘ

☒ Activate 'import samples' as a custom form option? ⓘ

☐ Allow users to edit request name? ⓘ

Override request name: ⓘ

Custom field name: ⓘ

Custom fields spec: ⓘ

☒ Allow managers to edit line item name? ⓘ

Display options

Click on *Allow charges attached to reservations?* Then click on *save* at the bottom of *Other Settings* to allow core staff to add charges to reservations.

Figure 23. Core administrators can turn on the setting to allow core staff to add charges to reservations.

To add a service to a reservation you must make sure the service is on the core's user list. You can check this by clicking on the *Request Services* tab. For more information please see the [How do I add or edit service requests or price lists?](#) in the linked manual.

You can add charges to reservations in two places, in the reservation itself (*Figure 24*) or in *unconfirmed usage*.

Manual for Core Staff - Equipment/Scheduling Core Facilities

event details
 ⚠ Unsaved reservation - please click **save reservation**.
 FACScan -- [Francis Crik](#) (555-555-5678) - (DNATest Lab) - (Unconfirmed)

 A description for Availability types can be seen here.
Availability Type:
 Off Peak Hours - Unassisted \$30.00/hr (trained users)
Specify the required resource ⓘ:
 FACScan

	start	end
scheduled:	December 22, 2011 12:00:00 PM	December 22, 2011 02:45:00 PM
logged:	December 22, 2011 12:00:00 PM	December 22, 2011 02:45:00 PM edit
billable:	December 22, 2011 12:00:00 PM	December 22, 2011 02:45:00 PM edit

Cost Center (Put in payment expiration in)
 Assign to an ongoing project of the same
 Select existing project
 Instructions for add on charges can be seen here.

additional charges for this

Click on **add on** to see the service list for your core. Find the service you are looking for, enter in the quantity then add it by clicking on the add button. The added charge will be listed under **additional charges for this event**.

Add consumable to charge
 Search: ⓘ by category | all
 end
 Name
 ▼ Other Charges (1)
 Next Day Expedite (Per Block) 3 → + \$5.00
 ▶ Services (2)
 ▶ Training (1)

Save Reservation Cancel

comments

+ add-on

Figure 24. Click on *add on* in the opened reservation to add charges to it.

Go to the calendar and double click on the desired reservation. When the event window opens there will be an *add on* button at the bottom of *event details*. Click on *add on* to see the service list for the core. Find the service you are looking for by clicking on the category. Enter in the quantity for the service then click on the add (+) icon to add the charge to the reservation.

You can also see and add additional charges to reservations in the *Unconfirmed Usage* panel (Figure 25) which can be accessed by clicking on *review usage* (Figure 3).

Manual for Core Staff - Equipment/Scheduling Core Facilities

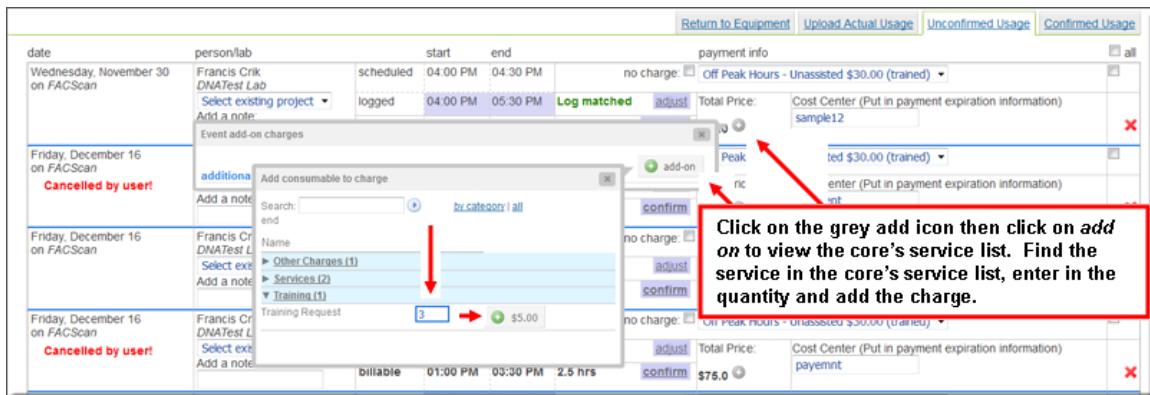


Figure 25. In *Unconfirmed Usage* you can add charges to reservations by clicking on the grey add icon.

Once you add the charge you will see it in the reservation row in *Unconfirmed Usage* and *Confirmed Usage* (Figure 26). In billing it would show up as a separate line item charge for that user.

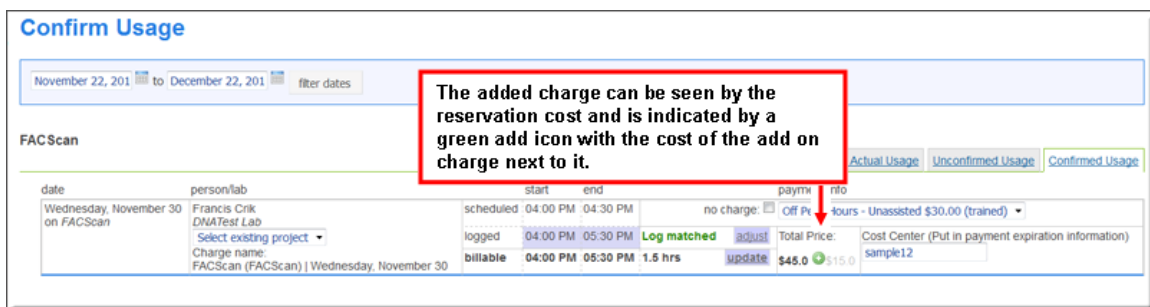


Figure 26. You can tell if a charge has been added to a reservation by the add icon under the Total Price being green instead of gray. You will see the total of the added charges next to the green add icon.

Manual for Core Staff - Equipment/Scheduling Core Facilities

How do I bill for confirmed reservations?

To bill customers for services rendered, navigate to the *Administration* tab, toggle the *Billing* section, and click *new billing event* (Figure 27).



Figure 27. When you are ready to bill for charges, click on new billing event under the Billing menu bar.

A screen that shows **all** charges that have not yet been billed will display (Figure 28).

The screenshot shows the 'New Billing Event' window. At the top, there are fields for 'Event Name' (set to 'For Demonstration Only - Biology Core - November'), 'End Date' (set to 'December 01, 2011'), and 'Group By' (set to 'researcher'). A 'Return to Administration' link is in the top right. Below these fields is a table of 'Included charges' with columns: date, customer, service id, total, payment number, status, and actions. The table lists several charges for Jackie Brown_Test and Francis Crnk. Below the table is a section for 'excluded charges' with a 'create' button. Numbered callouts explain: 1. Editing event name, date, and group by; 2. Included charges are line items marked as complete or confirmed; 3. Service ID; 4. Total; 5. Payment number; 6. Status; 7. Actions; 8. Excluded charges are added but not complete; 9. Create button; 10. Exit button (Return to Administration).

date	customer	service id	total	payment number	status	actions
10/20	Jackie Brown_Test Nuclear Magnetic R	FDO-BC-JB-134 300 NMR (300 NMR) T	30.00 (2.0 x \$15.0)	1234567	Ready To Bill	↓ ↻
10/20	Jackie Brown_Test Nuclear Magnetic Resonance Center (Wash. State) - Lab	FDO-BC-JB-134 300 NMR (300 NMR) T	7.50 (0.5 x \$15.0)	PO NR7745	Ready To Bill	↓ ↻
10/18	Jackie Brown_Test Nuclear Magnetic Resonance Center (Wash. State) - Lab	FDO-BC-JB-134 300 NMR (300 NMR) T	18.75 (1.25 x \$15.0)	PO NR7745	Ready To Bill	↓ ↻
10/18	Jackie Brown_Test Nuclear Magnetic Resonance Center (Wash. State) - Lab	FDO-BC-JB-134 300 NMR (300 NMR) T	18.75 (1.25 x \$15.0)	PO NR7745	Ready To Bill	↓ ↻
10/17	Jackie Brown_Test Nuclear Magnetic Resonance Center (Wash. State) - Lab	FDO-BC-JB-134 300 NMR (300 NMR) T	18.75 (1.25 x \$15.0)	PO NR7745	Ready To Bill	↓ ↻
10/17	Francis Crnk DRA Test Lab	FDO-BC-FC-168 300 NMR (300 NMR) T	3.75 (0.25 x \$15.0)		Ready To Bill	↓ ↻

Figure 28. In the New Billing Event you have several tools to manage charges before creating the billing event.

From this window (Figure 28), you have several tools to manages charges before running the billing event.

1. At the top of the *New Billing Event* window there are three fields that can be modified.
 - a. You can change the name of the billing event; the default is the name of the core and the month.
 - b. You also can determine the end billing date. The *End Billing Date* can be used as a filter so you can only see charges that were confirmed or completed before a certain date.

Manual for Core Staff - Equipment/Scheduling Core Facilities

- c. You can choose to have the charges group by researcher or by lab in the invoices generated when creating the billing event.
2. The first section is the *included charges* that lists all charges that will be included in the billing event. The charges in the *included charges* are line item services or charges that have been marked as complete in a request or are for reservations that have been confirmed by core staff.
3. The *service id* indicates the request that the charge comes from. Even reservation charges will be assigned a Service ID. If you want to view the request or view contact information for the researcher, you can click on the Service ID number and a new tab will open with the request row. See the [How do I review and update request details?](#) section of the manual to view details on how to view the request details.
4. The *total* of each line item charge is the total value of the charge determined by the number of units multiplied by the per-unit cost of the service or charge.
5. Under the payment number you will see the payment number entered by the user. You may have the opportunity to edit this information if you need to depending on any financial integration that may have been built with your institution.
6. The *status* of the charge will show if it is *Ready to be Billed*, *Not Billable* or *Pro Bono*. You may also see a red flag, showing when a payment number has not been entered or is not available, or a yellow flag showing that the charge is *Not Billable* or *Pro Bono*.
7. Under the *actions* column you can move charges or send emails concerning the charge.
 - a. You can move a charge from *included charges* to *excluded charges* if you do not want to bill for it at this time by clicking on the green down arrow.
 - b. The communication bubbles give you a place to email the researcher, PI or lab manager, core staff or anyone else you would like to email about the charge. The email will be tracked in the request itself.
8. To view *excluded charges* you can click on the blue arrow and expand the view. The charges in excluded charges are charges that have not been marked as complete, but have been added to requests. You will not see unconfirmed reservations here. You have the same tools on the *excluded charges* as you do in the *included charges*. You can move charges from excluded into included by clicking on the green up arrow under the *actions* column.
9. When you are ready to run the billing event, click on *create* under the *excluded charges*.
10. To navigate away from the *New Billing Event* when you do not want to bill yet click on *cancel* or on *Return to Administration*.

Once you have reviewed the charges and clicked on *create*, the next screen provides options to download spreadsheets with charges or a PDF of the Billing Event Summary, and also to send emails to core and institution administration with the Billing Event Summary (*Figure 29*).

Manual for Core Staff - Equipment/Scheduling Core Facilities

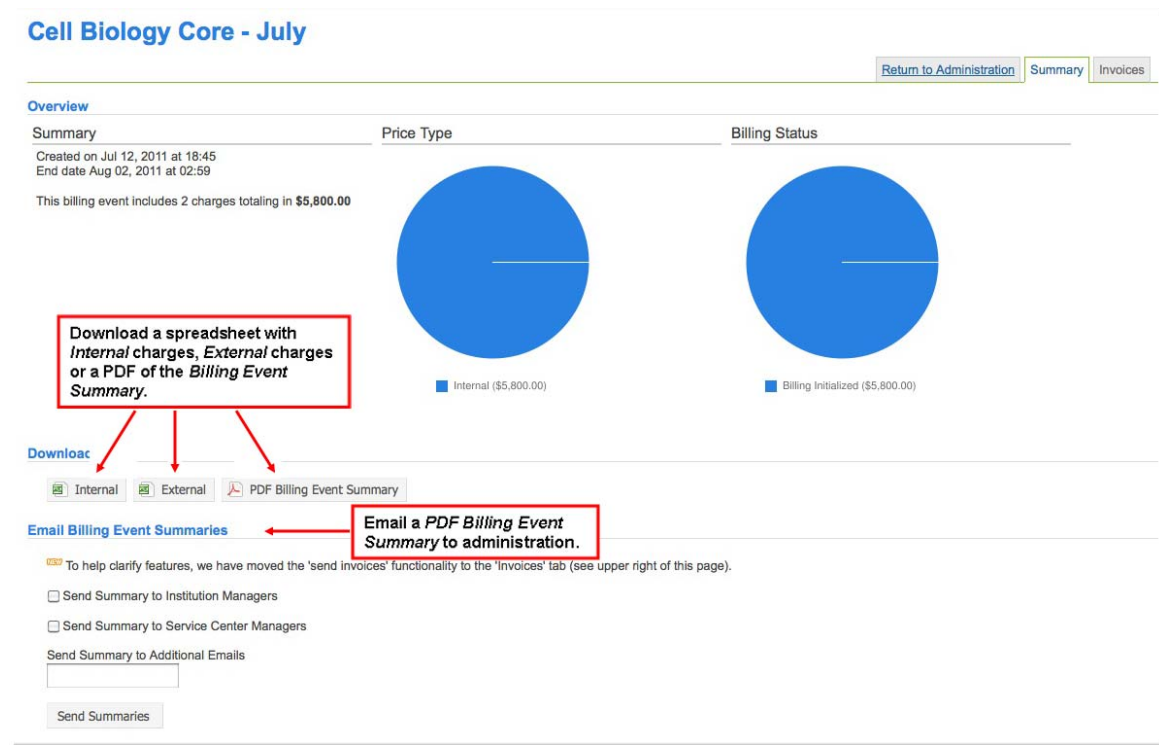


Figure 29. Once you create the billing event you will land on the billing event summary page.

To review charges and get a list of invoice options click on the *Invoices* tab on the upper-right hand corner (Figure 29). Once there you will have the option to create, print, and email invoices (Figure 30). You also can view charges broken down per invoice, email reminders and mark invoices as paid.

Manual for Core Staff - Equipment/Scheduling Core Facilities

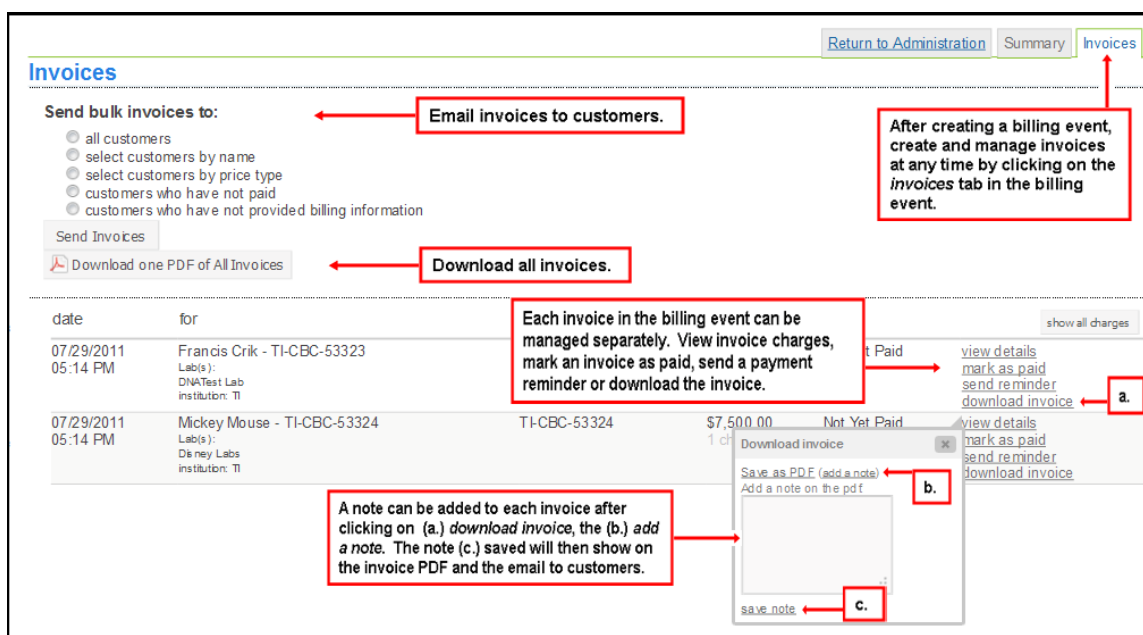


Figure 30. In the invoices tab you can create invoices, view charges, send emails and mark invoices as paid.

If you want to create an invoice in iLab you can do so by clicking on the *download invoice* option on the right of each invoice (Figure 30.a). A window will open where you can add a custom note to the invoice (Figure 30.b). Save the note, (Figure 30.c) then you can save the invoice as a PDF or email it from our system.

There is also a comments section on the invoice row, indicated by a pencil icon with a green arrow (🖋️), where you can add a comment for yourself or other core administrators about the invoice.

To add custom text or information to the invoice template, please email support@ilabsolutions.com with an example of what you would like to see on the invoice.

Manual for Core Staff - Equipment/Scheduling Core Facilities

What other administrative tools are available?

iLab Solutions provides a service that allows the core manager to have control of their pages as their facility grows. There are additional administrative tools available to the core to allow them to have control of their page. The core manager can set price classes for users, add core personnel as members in the iLab system, and adjust settings for their page in addition to the functionality reviewed above. Please view the section of the [linked](#) document for more information under *How do core managers update the public web-page?* and *What other administrative tools are available?*