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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.
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.

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

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.
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.
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.](image)

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.
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.](image)

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,
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](image)

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

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
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?**

1. Find the customers you want to email by filtering by date and resource type.

2. Select the users you want to email, enter in the email text then click on Send Emails.

*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.*
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.

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

Reservations can be edited by users opening the changed time for other users to schedule on, but allowing the core to see the original time.

Whole reservations can be cancelled by users opening the time for other users to schedule on, but allowing the core to see the original cancelled reservation.
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).

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)
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.

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

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
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
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*).
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.
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).
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.

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).
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.
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.

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

Figure 24. Click on add on in the opened reservation to add charges to it.
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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.
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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](image)

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).

![Figure 28](image)

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.

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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 my 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)*. 

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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.
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.
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?