Manual for Principal Investigators + Lab Financial Administrators - Core Facilities Management System

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Overview

As a PI or Financial Administrator, you have the opportunity to manage different parts of your lab's work with core facilities using iLab. You can setup an auto-approval threshold, allowing researchers in your lab to schedule equipment use or order services from cores under this price threshold without further approval. You can also use iLab to create budgets and monitor spending for specific cores. iLab also enables you to review, and approve or update core service requests placed by members of your lab. This document aims to help you get started using these essential iLab features.

If you experience any problems using iLab, do not hesitate to click the *'leave iLab feedback'* link in the upper right hand corner once you are logged in. Alternatively, send an email to support@ilabsolutions.com with your question and we will respond as soon as we can.

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My Homepage

When you first log into iLab make sure you update your time zone by choosing your correct time zone and then clicking on *Update my time zone*. After you update your time zone you will either land on the core's page you logged into or you may land on your homepage *Figure 1*. On your homepage you can view quick links to facilities you often use, view requests that require your attention and view a list of your reservations. You have menu options to manage your account, manage your support tickets and find lists of cores that you can access through iLab when you are on any page in iLab.

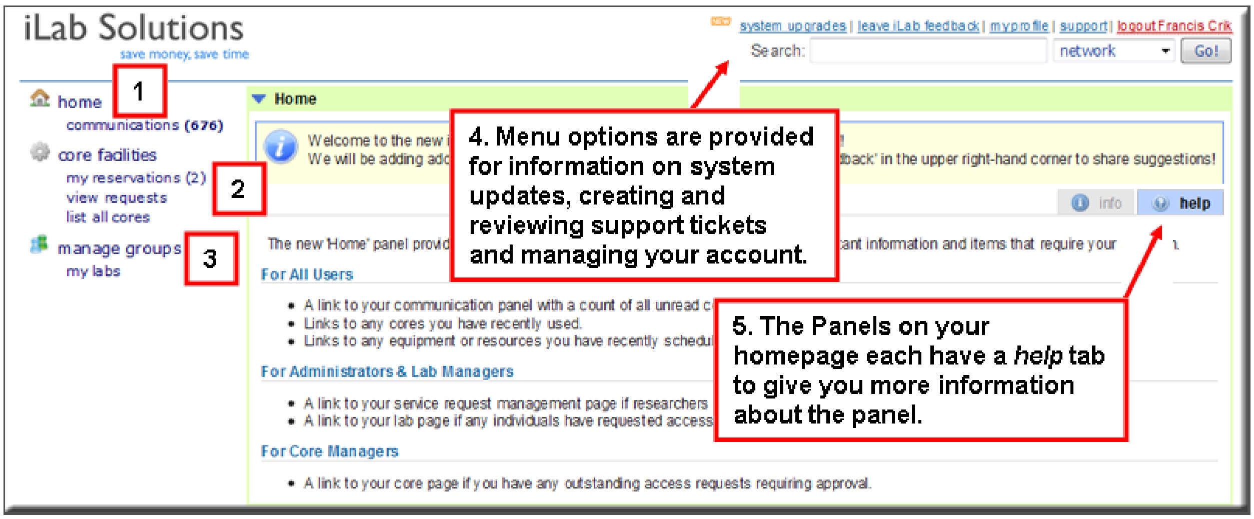

Figure 1. Your Homepage.

The *home* menu option on the left side of the page (*Figure 1.1*) will take you to your homepage and homepage panels. Under *homepage* is the *Communications* menu option where you can view emails sent through the iLab system. If your lab also utilizes the iLab Lab Management system, you will see menu options on the left side of the page for requisitioning.

Under *core facilities* (*Figure 1.2*) you may see *my reservations* where you can view past and future reservations you have with cores. You can see requests of services or projects that you have submitted to cores from the *view requests* link and you can see a list of cores that you can access from *list all cores*.

Under *manage groups* (*Figure 1.3*) you can view *my labs* to see details about your lab and lab members.

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The upper-right hand corner provides links for you to contact iLab support with leave iLab feedback, manage your account in my profile and manage your created support tickets from *support* (*Figure 1.4*). If you contact us through *leave iLab feedback,* you will be sending a message to the iLab support team so you will receive the most comprehensive support. This will also enable you to track your support tickets. You can view the support tickets you have sent by clicking on *support*. You can view 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 manage how you want to receive system-generated messages in *Manage Communications Preferences*.

Your homepage will have panels with different kinds of information. Each panel will have a help tab (*Figure 1.5*) with more information about the information seen in the panel.

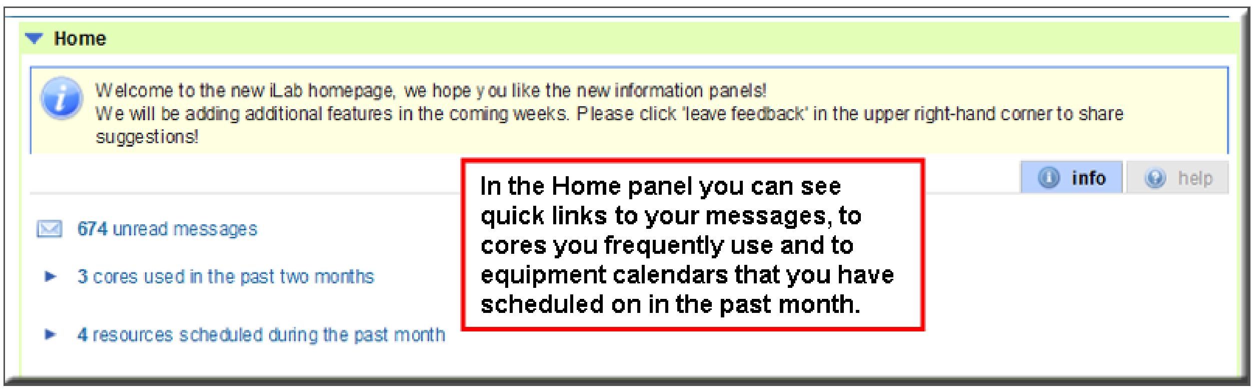

Figure 2. On the _homepage_ you will see the _Home_ panel that will have quick links to cores you use.

Under the *Home* panel you may see a *Service Request* panel. This panel will have any requests that require your attention in the *alerts* tab (*Figure 3.1*). Requests that require attention could be ones that require your approval, ones that are missing payment information or ones that you have not submitted to the core. Lab heads will see requests from all of their lab members and for themselves that require approval in the *Service Request* panel.

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***Figure 3*. Under the Service Request Panel you will see requests that require your attention under alerts.**

Under the info tab you will see up to twenty of your most recent requests (*Figure 3.2*).

You may also see a *Scheduled Events* panel that will show any of your reservations that are still pending core approval in the *alerts* tab, and all of your future reservations, up to fifteen, in the *info* tab.

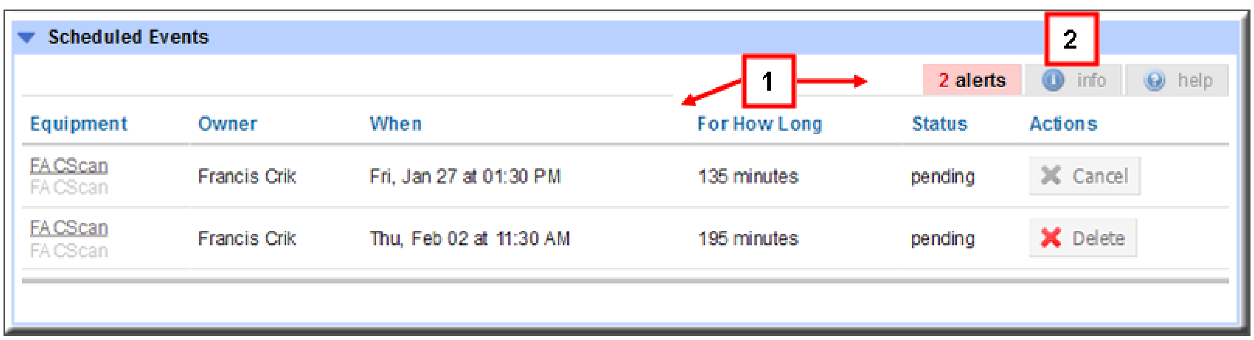

***Figure 4*. See reservations that are pending approval and your future reservations in the *Scheduled Events* panel.**

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How do I Manage My Lab Settings?

Once you have logged in to iLab, use the left-hand menu to navigate to different parts of the system. To manage different settings for your lab, hover over or click on the *my labs* menu option. If you are a manager or administrator of multiple labs, these will be listed. Click on the lab name to open a management view (*Figure 5*).

Figure 5. Click on *my labs* to view and manage your lab settings.

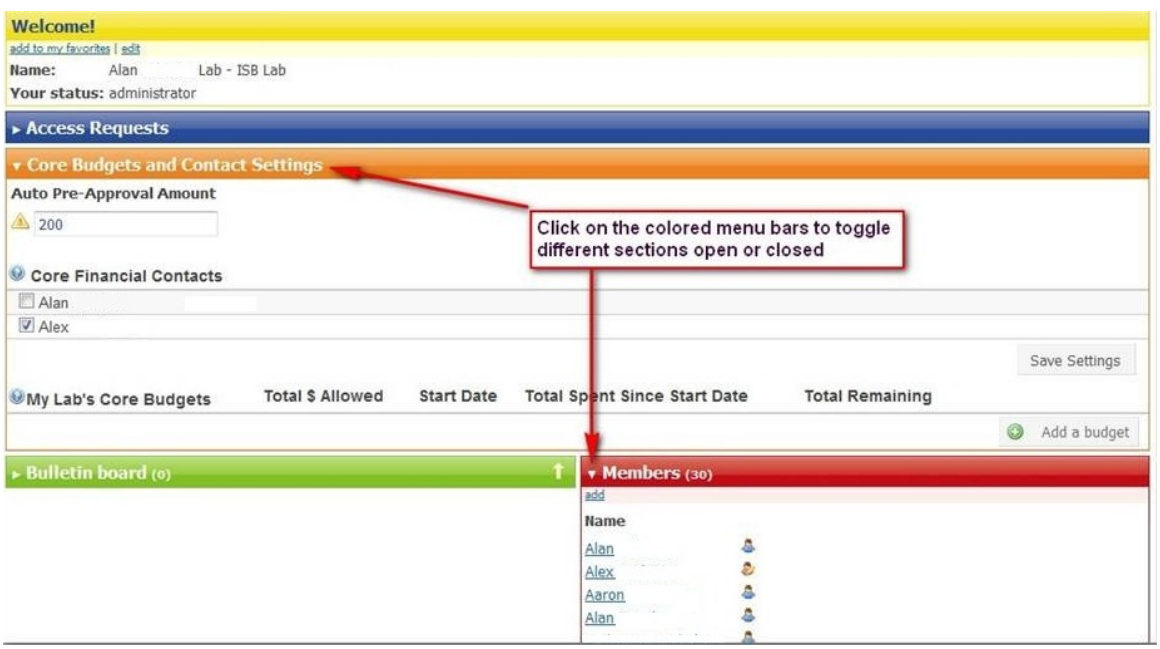

Figure 6. Click on the menu bars to view the settings.

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How do I Set the Quote Amounts that Require My Approval?

As a PI, you can determine the dollar amount up to which you would like your researchers to be able to self-approve service requests from cores. Simply set the desired dollar value and click *Save Settings* (*Figure 7*).

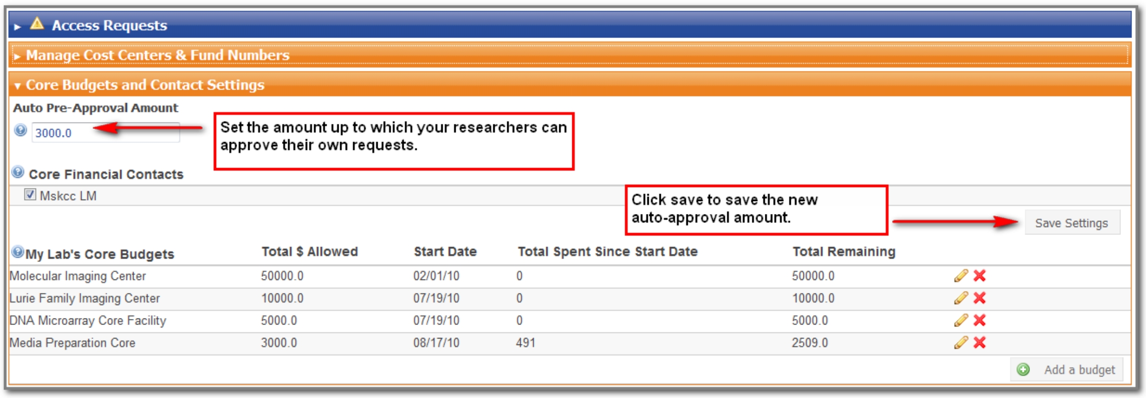

Figure 7. Set the dollar amount that would like approve for service requests made by members of your lab with cores.

How do I Create Budgets and Monitor Spending?

As a PI or lab manager, you can create a budget for each core from which your lab requests services or equipment use. By creating a budget, you can track how much researchers in your lab have spent against each core, and receive an email reminder when you approach the budget. Click *Add a budget* and complete the form to add a budget for a core.

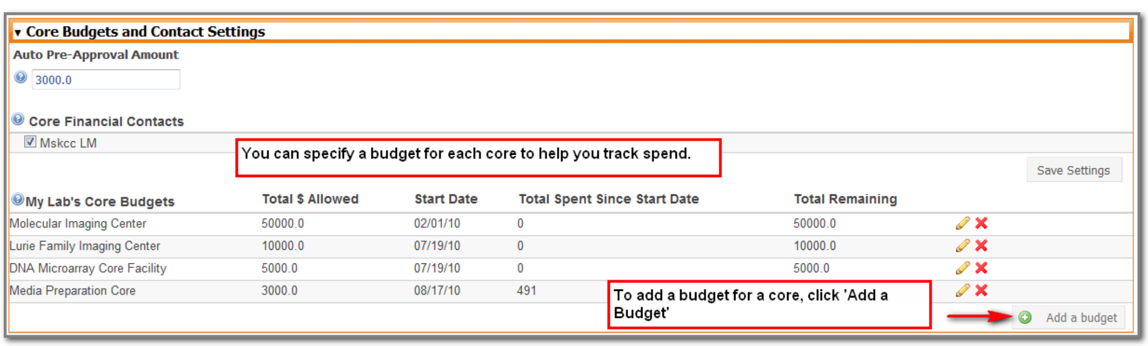

Figure 8. You can manage how much members of your lab can spend with each core.

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Can I Review Service Requests made by Members of My Lab?

As a PI or Financial Administrator, you can review all service requests owned by researchers within your lab. Your approval of scope of work and financial details may be required for a core to begin processing a service request.

To access this interface, click on the *view requests* link under *core facilities*, in the left-hand menu once logged into iLab. Details of this work flow are outlined in *Figure 9*.

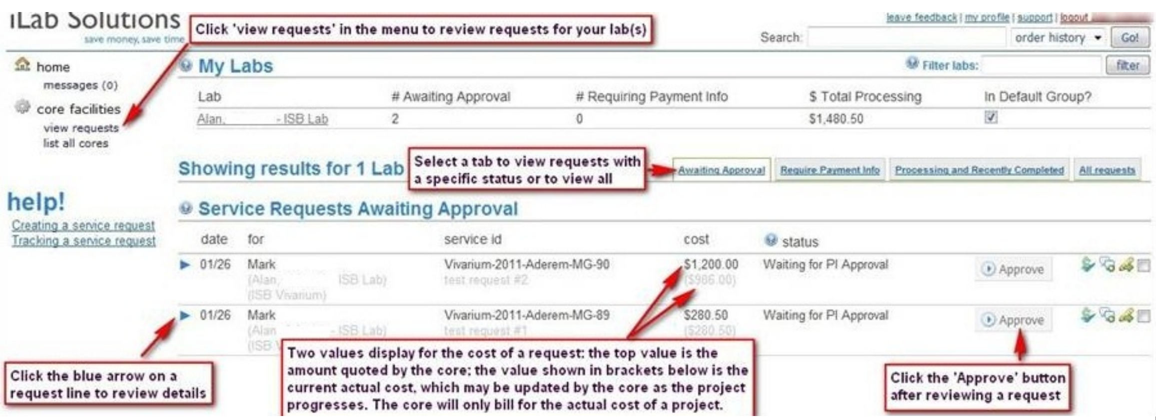

Figure 9. View requests made by members of you lab by clicking on *view requests*.

Depending on the number of requests under a particular tab, a search and filter panel may display at the top of the requests list. Use this feature to focus in on a more limited list of requests: search by request type or request status using the pulldown menu; filter results to within a restricted date range. Click on the *Search* button on the right side of the panel to update the search results (*Figure 10*).

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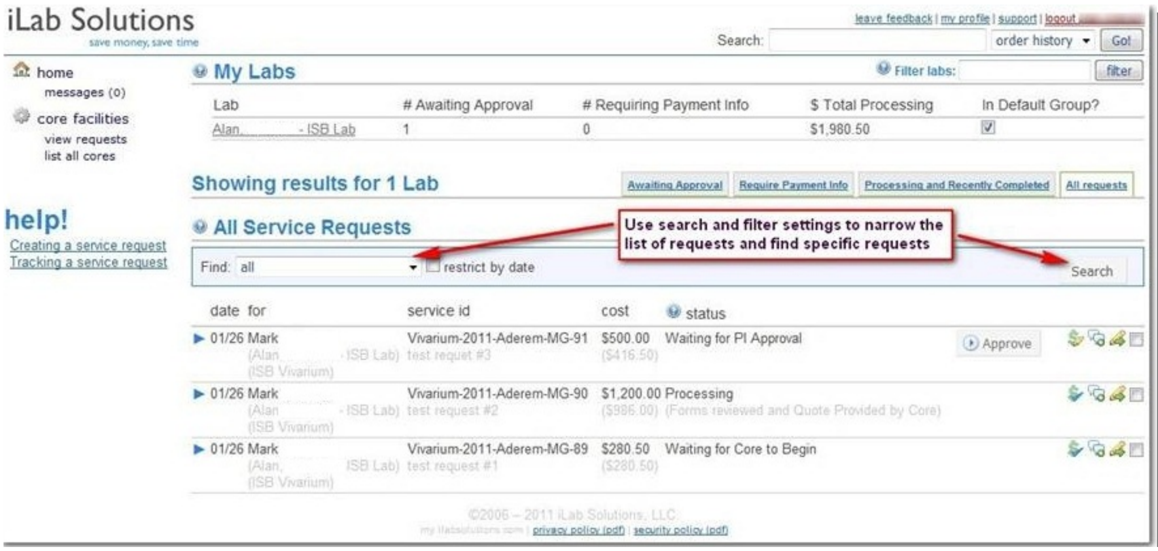

Figure 10. You can search for particular requests using the search too bar.

How do I Approve Service Requests?

Some requests may have a projected cost that is above your approval amount. Those requests will be marked *Waiting for PI Approval*. Instructions on how to approve a requests *Waiting for PI Approval* are seen in *Figure 11*.

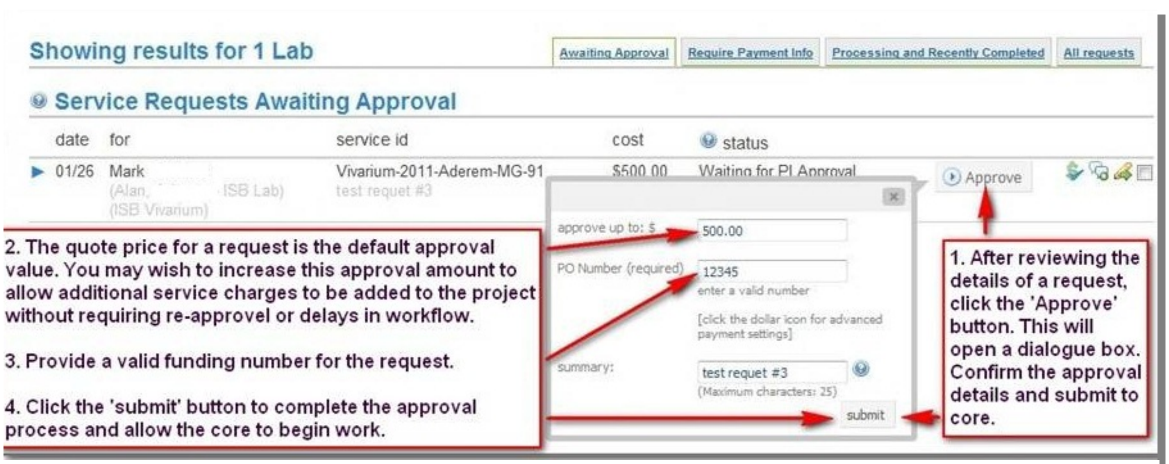

Figure 11. Approve requests with projected costs above your approval amount.

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How do I Update Payment Information for Requests?

Service requests can be reviewed by clicking open the *Require Payment Info* tab. The payment icon on the right-hand side of these requests lines shows a yellow warning symbol over the green dollar sign. To update the payment information for a specific request, click the payment icon on the request line. An *Update Payment Information* window will pop open to review and update payment details for the request. Follow the steps in *Figure 12.*

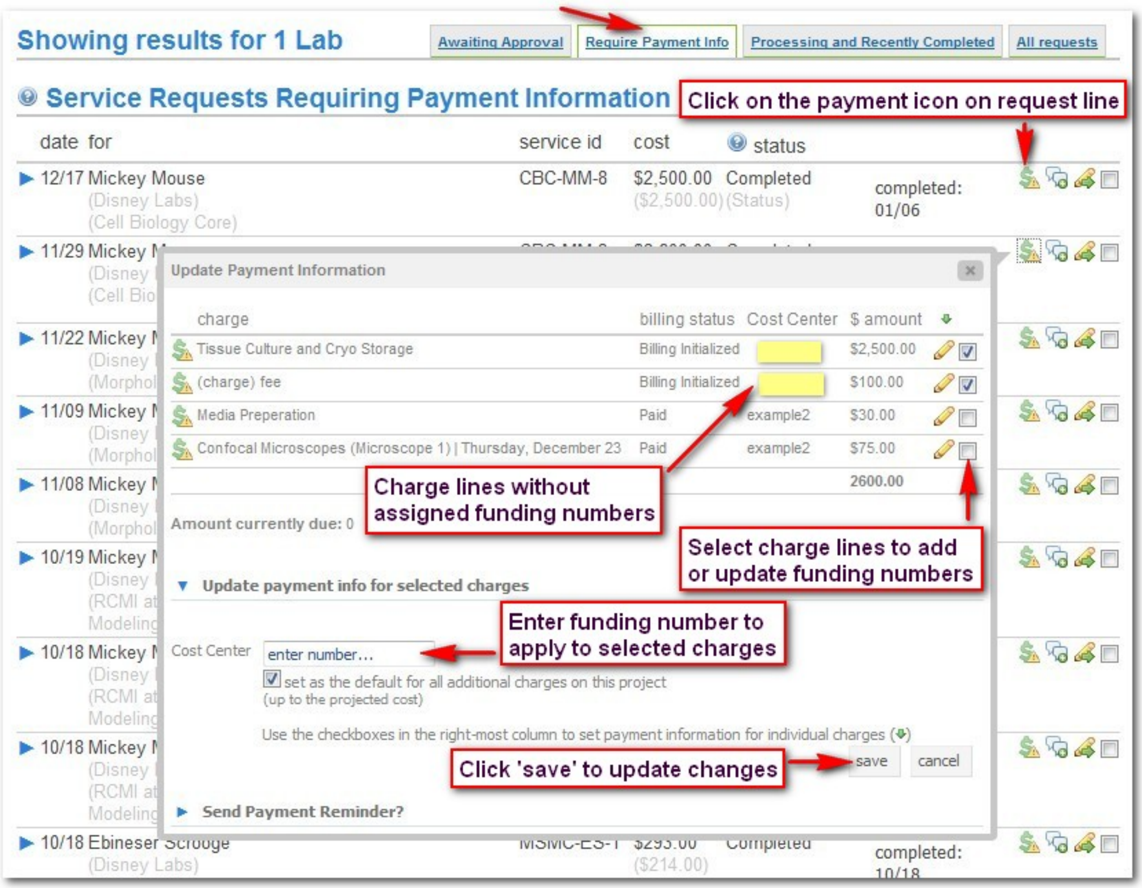

Figure 12. You can update payment information by clicking on the dollar sign icon on the right of every request.

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For further guidance on placing service requests and scheduling equipment use with a core facility's using iLab, please refer to this customer manual.

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