

iLab For Business Offices

Administration and Functionality

Last updated 6/6/2024



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What is iLab?

iLab At Purdue

iLab is a web-based application adopted by Purdue University to assist in managing research core billings and recharge services provided by the University. The system serves as a central starting point for principal investigators and their lab members to locate research cores and supporting service.

iLab allows users of Purdue research cores to search for and reserve equipment, request services, while allowing the billing for these to be integrated with Purdue's financial systems.



What is in this training?

Additional Training Resources

This training is designed to provide business administrators at the lab, department, core or center level with a basic overview of iLab and illustrate how to perform some of the more common tasks :

- Adding new faculty, student, staff and external customers
- Controlling membership to labs/departments/cores and centers,
- Assigning/editing account string access
- Reviewing and approving invoices
- Adding/Editing charges

This training is not focused on billing events or creating or processing corrections, nor does it cover reporting. These will be covered in additional trainings.

Adding new users to iLab

Adding New Faculty, Student, Staff and External Customer users-Overview



The process of adding new Faculty, Student, Staff and External Customers have some similarities, but due to the nature of each role, there are enough key differences that we will be discussing each in turn. Portions of this will also be touched upon in Lab, Department, Core and Center Administration.

The basic building block of iLab, is the Principal Investigator (PI) lab. To perform any but the most basic tasks, a user must exist in a PI lab. Users without a PI lab are not able to request services, reserve equipment time, and in many cases are not visible to lab, department, core or center administrators. If a user was removed from their lab and does not have a secondary lab presence, it may be necessary to contact ilabhelp@purdue.edu for assistance.

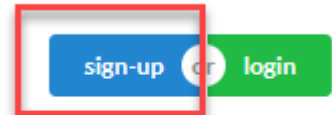
Adding new users to iLab-Faculty

How to add a new Faculty iLab user (1 of 2)

The process of adding new Faculty users to iLab will depend on whether the faculty member has sponsored funds assigned to them or not. All Faculty users with sponsored funds are automatically added on a nightly basis, without any request being needed.

Faculty members without sponsored funds are not automatically added, but are instead created by request, with two options.

Option 1, is for the Faculty Member to signup for an account (choosing Signup on the [login page](#)); and then choose “Apply For Faculty Account” as the PI/Group:



iLab Account Registration

Hello Tiffany LB Weatherford,

Welcome to iLab! Please choose your PI or group to get started!

PI/Group: ★

First Name: ★

Last Name: ★

Email: ★

Phone number: ☎ ★

Adding new users to iLab-Faculty

How to add a new Faculty iLab user (2 of 2)

Campus iLab support will approve this request, and then submit a further request for a lab to be created. Once The lab has been created, Campus iLab support will then contact the faculty member when the lab is created and provide additional directions to contact their department business office to pull the newly created lab into the department and assign account strings.

Option 2, is for the faculty member or their business office to upload a secure document to Purdue Box ([select here](#))

Then, the faculty member or business office needs to submit a support ticket to ilabhelp@purdue.edu requesting a new lab to be created.

Campus iLab support will then submit a further request for a lab to be created. Once The lab has been created, Campus iLab support will then contact the faculty member when the lab is created and provide additional directions to contact their department business office to pull the newly created lab into the department and assign account strings.

Adding new users to iLab-Students

How to add a new Student iLab user (1 of 1)

New student iLab users must apply to a currently existing lab to gain iLab access. They should be provided a copy of the [iLab For Purdue Lab Members QRC](#) and asked to follow all directions. Once they have applied and been approved, their departmental business office should assign account strings so that they can reserve equipment or request services.

If the student has already been in iLab and needs to be added to a new or secondary lab, [follow the instructions here](#).

Please be aware that if a student has been removed from their old lab and has no current lab affiliation, they may be “unsearchable” due to having no lab presence. If this occurs, please submit a request for help to ilabhelp@purdue.edu with the student’s full name and email, their prior lab affiliation if known, and the desired new lab. Campus iLab support will then correct or submit a service request as needed to resolve.

Adding new users to iLab-Staff

How to add a new Staff iLab user (1 of 1)

New staff users are usually handled similarly to students, but in some, rare cases may need to be handled like PIs. In most cases staff members are members of PI labs or belong to the Department Admins lab (if providing department level business/core support), or the iLab Admins lab (if providing core/center level support).

Business offices should direct staff members to the [iLab For Purdue Lab Members QRC](#) for the process of signing up. Once they have applied and been approved, their departmental business office should assign account strings so that they can reserve equipment or request services.

If the staff member has already been in iLab and needs to be added to a new or secondary lab, follow the [instructions here](#).

In rare cases, the staff member may need to be the PI of a lab, in which cases please email ilabhelp@purdue.edu with their full name, email and a prospective name for the lab. Unlike faculty labs, staff members labs should be given a name descriptive of the function. In most cases, the lab will persist if that staff member separates, with a replacement PI being put into place in the same lab.

Adding new users to iLab-External Customers

How to add a new External Customer iLab user (1 of 1)

Before External Customers can be added, a Business Partner Number (BPN) must first be established. This process of requesting a BPN is [covered here](#). An Institution will also need to be added to iLab.

To have an institution added to iLab, the business office should send an email to iLab@purdue.edu with the following information:

- Name of Institution:
- Business Partner Number
- Name of PI and email (the name of an initial lab owner from that institution and their email)
- Contact Email (Yes/No): If the PI will need a password set, this should be Yes (most needed if the PI will be on a Purdue campus, or directly requesting services inside of iLab). If the PI will be billed without needing system access/login, this should be No.

Once an institution is established in iLab, further institution members can add new labs, or new lab members by signing up, and choosing the Institution, or an existing lab at that institution. If a new lab with a different BPN is desired (often better for efficient billing or larger or internally divided entities), an email with the above information should be sent to ilabhelp@purdue.edu, with a subject of “Need Lab added to existing institution”

Establishing Access-Overview

How to add Lab, Department or Core Admin access-Overview



Once faculty, staff, student or external customer users have been added to iLab, they should have a primary lab membership. They can then be:

- Added to additional labs
- Given administrative access in labs, departments, cores or centers,
- Assigned permissions to use specific equipment or services (not covered in this training)
- Assigned a price type that differs from their default

The next training sections will go over several of these tasks and others from the perspective of a Lab, Department, Research/Recharge Core, or Center administrator.

Lab Administration

How to perform lab administration tasks

The administrator in an iLab Lab can be the Principal Investigator (PI), a Co-PI, or a lab member who has been assigned the financial administrator role. Current administrators can add additional administrators at their own level, or by a Departmental (Business Office) Administrator who has delegate rights over that lab.

The main tasks of Lab administration can include:

- Approving lab membership requests
- Assigning or Editing Account Strings
- [Approving invoices](#) (select to move to the training on this task)

In most cases, many of these tasks will be assigned to departmental level administrators, who will have centralized control over many labs in the department. The division of tasks should be discussed with the departmental business office to make sure that all required tasks are being monitored and completed in a timely manner.

Lab Administration-Approve Lab Membership

How to approve student or staff additions to Principal Investigator labs (1 of 1)



To check for an approve lab membership request, first click on My Labs in the left navigation and choose a lab for which you are the PI (Principal Investigator), or have admin rights in. Department Administrators can also perform this task by clicking on My Departments and then choosing the department to approve requests in.



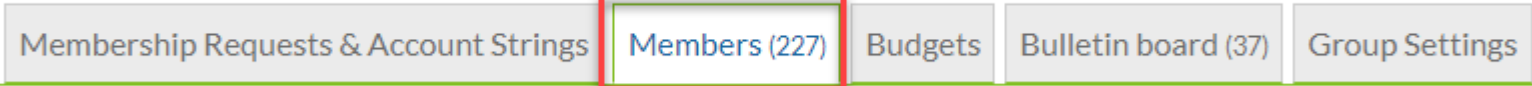
If there are pending requests, the Membership Requests & Account Strings tab will have a red circle with a number indicating how many pending requests there are.



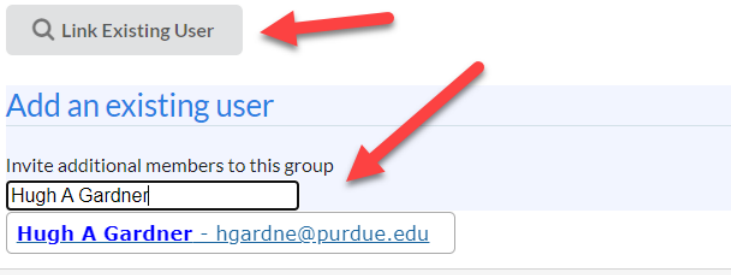
For each request, you can click **Accept** to allow that student or staff member to join the lab or **Reject** to clear the request.

Lab Administration-Adding/Editing Lab Membership

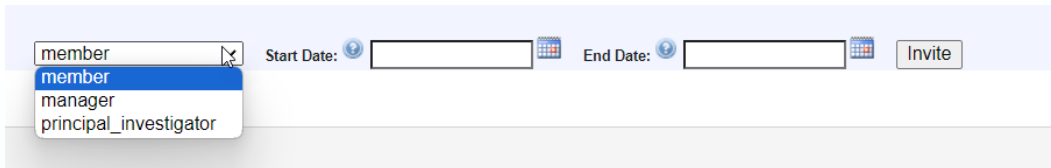
How to add Lab, Department or Core Admin access-Labs (1 of 2)



To add a user or administrator to a lab, first click on the Members tab in the lab interface (access from My Groups)



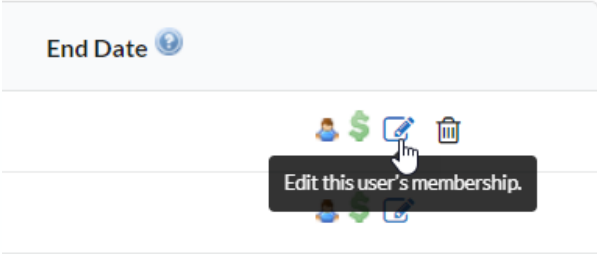
Then select Link Existing User and type in the desired user's name (in most cases Firstname Lastname, or Firstname, Middle Initial, Lastname will return the user (who must be an existing, registered user)



Choose a level of access (for lab admins select manager), optional Start and End Dates, and then click Invite. This process can also be used to add users in other labs to additional labs.

Lab Administration-Adding/Editing Lab Membership

How to add Lab, Department or Core Admin access-Labs (2 of 2)



You can change an existing user into an administrator by selecting the blue edit pencil.

Association Information

Permission

principal_investigator

- member
- manager
- principal_investigator

Core Financial Contact?

Start Date

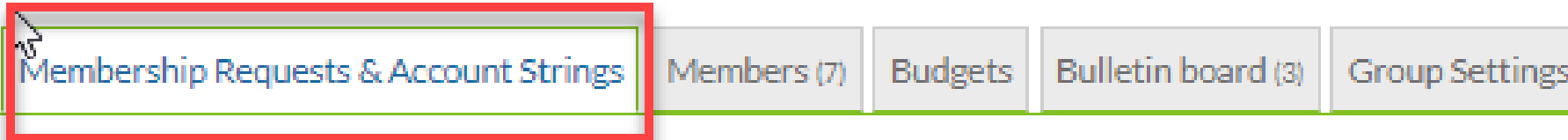
End Date

Cancel Save

Under the Association Information section, you can change the access level, and then select Save.

Lab Administration-Assigning Account Strings

How to give student or staff lab members access to account strings (1 of 3)



To give access to account strings in a PI (Principal Investigator) lab, first click on the Membership Requests & Account Strings tab in the lab interface.

Manage Account Strings

Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

Display 10 members per page Search by member name:

Name	Default Account String	10010000-3091003000-7231231239	10010000-4004008000-6200001682 Presidents Council	21010000-8000011257 671 1520-4805	21010000-8000034034 Walther Oncology Physical Sci
Marietta Harrison	None	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gwen Sanders	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Randy Morsel	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Showing 1 to 3 of 3 member(s)

A list of all current account strings will appear, with a blue checkmark indicating access. Click an empty white box to create a blue checkmark, indicating allowed use.

To remove access to an account, click the blue checkmark, and it will show as an empty white box again.

Lab Administration-Assigning Account Strings

How to give student or staff lab members access to account strings (2 of 3)

Showing 1 to 7 of 7 entries

1

Request access to additional Account Strings

If you don't see a Account String that you should have access to, please type it in below. The Fund Owner will receive a notification and approve or deny your request.

If you don't see a Non-Sponsored Account String that you should have access to, please type it in below.

2 Internal Order	3 Wbs Element
Request	

4

Disable/Enable Account Strings

The list of these Account Strings are received automatically from your institution's financial system. If you have any Account Strings that are not used, please uncheck those below. Selected ones are displayed and usable in the grid above. Please note, when you uncheck a specific Account String, users will NOT be able to use it and any active charges that have not been billed will be considered invalid. If you think a Account String should not be in your lab permanently, please contact the PI.

[select all](#) | [select none](#)

4200000364 - Electromicroscopy Recharge

5

Save changes

If you don't see an Account String the PI lab should have access to you can add new accounts. To add, expand the Request access to additional Account Strings (1) and then enter the IO (2) or WBSE (3) and select Request (Note-only primary holders can have sponsored funds loaded into a lab).

You can expand Disable/Enable Account Strings (4) and toggle the active state of any funds, then selecting Save changes (5) to effect your changes.

Lab Administration-Assigning Account Strings

How to give student or staff lab members access to account strings (3 of 3)

Filter Account String numbers

Filter Members

Name	Default Account String
Christopher Gilpin	<div data-bbox="988 565 1192 658"> <input type="text" value="4200000446"/> <ul style="list-style-type: none"> <li data-bbox="988 594 1131 615">4200000446 <li data-bbox="988 622 1054 644">None </div>
Dale Purcell	None
Hugh A Gardner	None

You can also assign a Default Account String for the lab member. This account string will be selected by default when they make equipment reservations, or request services. This is highly recommended if most of this lab member’s charges will be focused on one fund, as it will reduce the chance of improper charge allocation, as well as streamlining the process of reserving/requesting.

Department Administration

How to add perform department administration tasks

The administrator in a department is a lab member who has been assigned the financial administrator role. Current administrators can add additional administrators

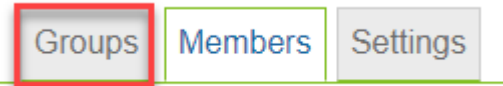
The main tasks of department administration can include:

- Approving lab membership requests for Principal Investigator (PI) labs
- Editing the membership of PI labs
- Adding additional PI labs to the department
- Assigning or Editing Account Strings in PI labs
- Reviewing Accounts on pending recharges
- [Approving invoices](#) (select to move to the training on this task)

The division of tasks should be discussed within the departmental business office to make sure that all required tasks are being monitored and completed in a timely manner.

Department Administration-Adding Additional PI (Principal Investigator) Labs

How to add labs to Departments



To add new PI (Principal Investigator) labs to the department, first select the Groups tab in the department interface.

Search for a Group:

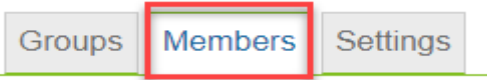
1 results for **Gilpin**:

Group Name	Add
Gilpin, Christopher (PUR) Lab	Add

Then type in the last name of the PI who’s lab you wish to add, or the name of that lab if a staff lab. Select the Add button to add the lab to the department. Once added, all current department administrators will have delegate access (allowing them to accept new lab members, add/edit account strings, and view and edit invoices for department labs).

Department Administration-Adding Department Administrators

How to add Lab, Department or Admin access-Departments



To add a new Department level administrator, first click on the Members tab in the department interface (chosen from My Departments)

Manage administrator and staff access

Add additional members from your institution by searching for first and last name:

1 results for **Hugh A Gardner**:

Name

Hugh A Gardner

Invite

financial_manager

Then type in the desired user's name and select Search (in most cases Firstname Lastname, or Firstname, Middle Initial, Lastname will return the user (who must be an existing, registered user). The only access level available is Financial Manager. Select Invite to complete the process.

Reviewing Accounts

Verifying accounts on pending charges

As a best practice Programmatic and Fiscal review of all charges should occur monthly to avoid billing errors, corrections, and stoppage of billing events.

Fiscal review and approval of iLab invoices of \$1,000 or more should be conducted monthly during the Departmental Account Review period.

Fiscal approval should be completed by an individual with appropriate fiscal level delegation using the Approve function in iLab.

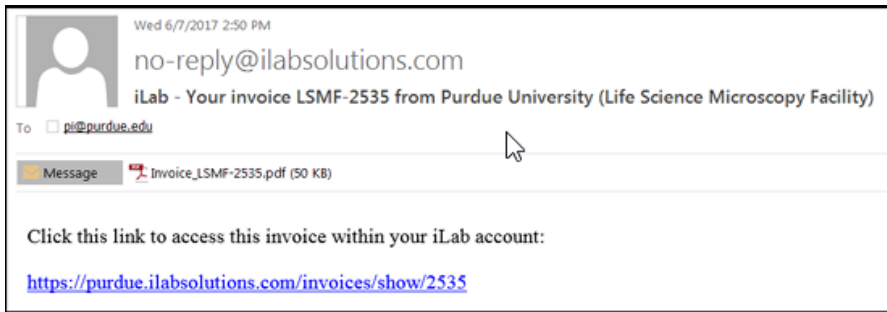
Initiators of iLab service/equipment request are responsible for allocability and must be the PI or PI delegate for the account(s) being charged.

PI Delegates must have PI delegation and any threshold restriction on file with the Business Office.

Reviewing Invoices

Steps to review invoices incurred by lab members

Once a billing event has been created by a research/recharge facility, the Invoice Owner/Financial Contact (in most cases the PI (Principal Investigator) of the lab will be emailed. The link in the email will open the invoice for review:



Invoice Date: May 03, 2023
Lab: [Redacted]

From: Evaluation & Learning Research Center (ELRC) To: [Redacted] (PUR) Lab [Redacted]

[show additional contacts](#)

Invoice Total \$40,863.30

⚠ This invoice has not been approved by a financial administrator.

DATE	ITEM DESCRIPTION	PMT#	QTY	PPU	STATUS	TOTAL
Request: E&LRC(ELRC)-WB-2 Start: December 12, 201						
(46363929) April 30, 2023 (0116301772)	Service	F50002054.0 2.010	95.9	\$67.00/ea	Completed	\$6,425.30
Actual cost: \$110,883.66		Projected cost: \$51,034.00		Invoice cost: \$6,425.30		
Request: E&LRC(ELRC)-WB-18 Start: March 06, 2020						
(46363933) April 30, 2023 (0116301772)	Service	F50002054.0 2.035- 46010000--	280.0	\$67.00/ea	Completed	\$18,760.00
Actual cost: \$323,074.00		Projected cost: \$67,000.00		Invoice cost: \$18,760.00		
Request: E&LRC(ELRC)-WB-19 Start: April 23, 2020						
(46363940) April 30, 2023 (0116301772)	Service	F50002054.0 2.036- 46010000--	55.0	\$67.00/ea	Completed	\$3,685.00
Actual cost: \$154,703.00		Projected cost: \$67,000.00		Invoice cost: \$3,685.00		

PI's are requested to review charges for accuracy. Any discrepancies in account assignment or percentage allocations should be communicated to the account manager in the departmental business office. **Note:** if the fund/account is edited, there is no need for a correcting event if this change occurs before the billing event sends.

If there are no errors, no additional action is required. The invoice will auto approve as part of the iLab billing calendar (10 days after the billing event is created and invoices are sent).

Approving Invoices

Steps to review invoices incurred by lab members

Invoices

This page displays invoices from the past one year. To access older invoices please use the Date Created filter at the top of the page.

Created On	Core	Invoice Number
Mar 29 '24	TAP Core	TC-4340659
Mar 28 '24	Purdue Proteomics Facility (PPF)	PPF-4334343
Mar 27 '24	BRK Lithography Core	BLC-4333632
Mar 27 '24	BRK Metrology Core	BMC-4333630
Mar 27 '24	TAP Core	TC-4330791
Mar 26 '24	BRK Evaporation Sputtering Core	BESC-4330641
Mar 26 '24	BRK Metrology Core	BMC-4330633
Mar 26 '24	BRK Growth Core	BGC-4330632
Mar 26 '24	BRK Evaporation Sputtering Core	BESC-4330631
Mar 26 '24	BRK Furnace Core	BFC-4330615
Mar 26 '24	BRK Etch Core	BEC-4330614
Mar 26 '24	BRK Characterization Core	BCC-4330613
Mar 26 '24	BRK Lithography Core	BLC-4330466
Mar 26 '24	BRK Etch Core	BEC-4330465

Departmental administrators will often need to look over and approve larger numbers of invoices, and in some cases for multiple departments. Selecting Invoices from the left navigation will show all invoices the admin has delegate rights to view.

These can be further refined using the filters in the left navigation (Owner, Labs, and Cores being particularly useful).

Once any filters have been changed, selecting Apply Filters will then reload the invoices, showing just those included in the filters.

Approving Invoices

Steps to review invoices incurred by lab members

This page displays invoices from the past one year. To access older invoices please use the Date Created filter at the bottom.

Displaying 30 out of 18823 result(s). (Page 1 of 628)

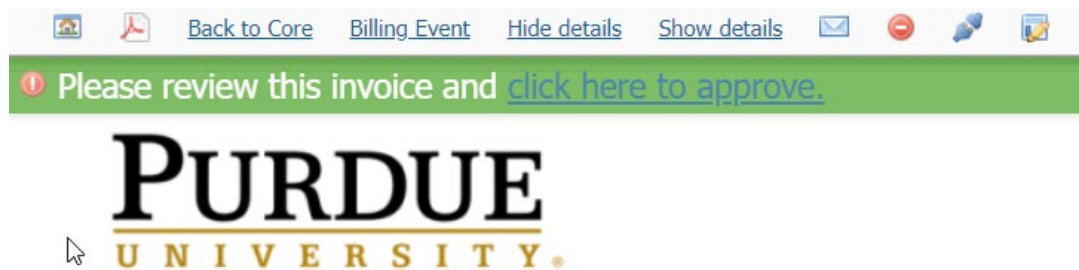
Created On	Core	Invoice Number	Lab	Owner	Payment Numbers	Price Types	Total Cost	Past Due	Status	Approval Status	
Oct 10 '23	Civil Engineering JTRP Vehicle Recharge					Internal	\$5,179.60	0 - 30 days	Not Yet Paid	required	
Oct 10 '23	Physics Helium Core					Internal	\$524.81	0 - 30 days	Not Yet Paid	auto-approval scheduled	
Oct 10 '23	Physics Helium Core					Internal	\$2,708.46	0 - 30 days	Not Yet Paid	auto-approval scheduled	
Oct 10 '23	Physics Helium Core					Internal	\$6,543.61	0 - 30 days	Not Yet Paid	auto-approval scheduled	
Oct 10 '23	Physics Helium Core					Internal	\$220.20	0 - 30 days	Not Yet Paid	auto-approval scheduled	

Invoices that require fiscal approval will have a red exclamation sign (note 1). Those that have been approved will not have this indicator (note 2). You can click on the magnifying glass icon to open and view invoices.

Approving Invoices

Steps to review invoices incurred by lab members

If you open an invoice, you will see that it either needs approval, or has been approved (with the name of the approver, and the date it was approved)



The fiscal approver will need to approve invoices totaling \$1,000 or more.

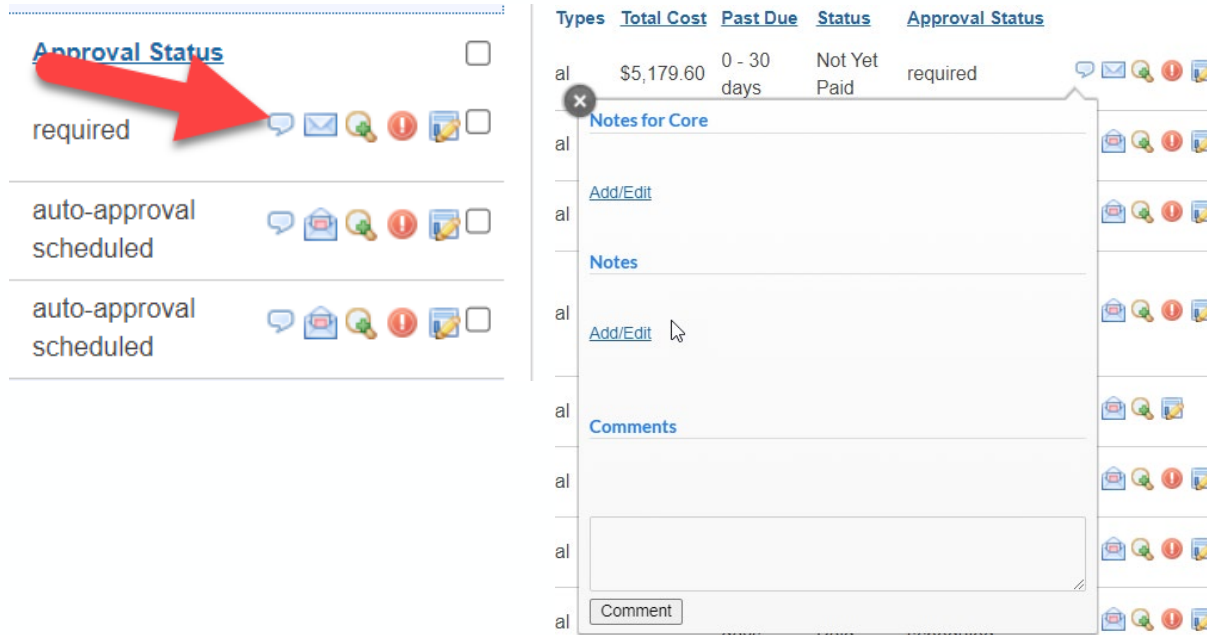
Invoices totaling \$5,000 or more should be approved by the appropriate fiscal approval delegation level.

If the Approve function has already been utilized by a first or second level approver or programmatic personnel, the Comments section shown in the next slide should be used to note the required approval information.

Approving Invoices

Steps to review invoices incurred by lab members

To do so select the comment icon, and then add a comment (bottom box).



Approvals should follow the standardized naming convention below:

Date/Approved & Fiscal Level/Department for account being charged/Approver alias.

Ex. 10.8.2023/Approved Level 2/BME/asmith88

NOTE: Fiscal approvals made by email should be noted in the **comment field** using the **naming convention** and the **approval email attached to the invoice in iLab**. Do not use the Notes function for this.

Ex. 10.8.2023/Approved Level 3 email attached/BME/DFA name or alias

T

Core Administration

How to add perform core administration tasks

Business office staff can be asked to participate in the day-to-day operations of iLab Research/Recharge cores. The tasks can vary from core to core, but the most common include the following:

[Adding New Core Administrators](#)

[Requesting addition of new external customers to iLab for billing purposes](#)

[Applying Pricing Type Overrides](#)

Creation of billing events (covered in [Billing Events and Error Correction QRC](#))

[Confirming Usage](#)

Corrections and Refunds (covered in [Billing Events and Error Correction QRC](#))

Sending invoices (covered in [Billing Events and Error Correction QRC](#))

[Submitting Requests for Equipment Reservation](#) or [Services on behalf of core customers](#)

Uploading File Upload/Charge Entry billings (covered in [Billing Events and Error Correction QRC](#))

Core Administration-Adding Core Administrators

How to add Core Administrators (1 of 2)



To add a new Research/Recharge core administrator, first select the Administration tab (one of four orange bordered tabs that are only displayed to current administrators) in the core (chosen from My Cores)

▼Members

Manage administrator and staff access

Add additional members from your institution by searching for first and last name:

Hugh A Gardner

1 results for **Hugh A Gardner**:

Name	Invite
Hugh A Gardner	<input type="text" value="member"/> <input type="button" value="Invite"/> <ul style="list-style-type: none"> member manager financial_manager admin

[current managers and employees](#)

Select the Members tab to expand, and then search for the desired user’s name (in most cases Firstname Lastname, or Firstname, Middle Initial, Lastname will return the user (who must be an existing, registered user). Assign a level of access (discussed further on the next page) and select Invite.

Core Administration-Adding Core Administrators

How to add Core Administrators (2 of 2)

Members can:

- Initiate reservations/project requests on behalf of users
- Manage requests and calendars

Managers can:

- Can edit content on the about our core, request services, and schedule equipment tabs
- Manage requests and calendars
- Run billing and reporting capabilities

Financial Managers can:

- Can edit content on the about our core, request services, and schedule equipment tabs
- Manage requests and calendars
- Manage facility members
- Run billing and reporting capabilities

Core Admins can:

- Full access to core's site and members
- Manage all administrative settings
- Access to all editing functions
- Run billing and reporting

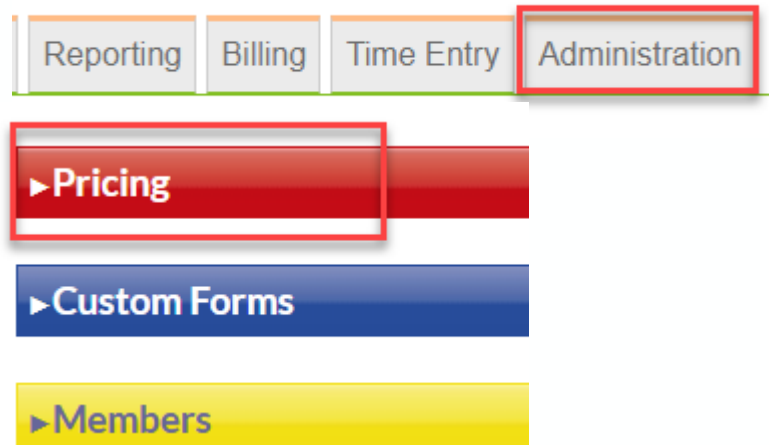
Core Administration-Applying Price Type Overrides

Custom Pricing Assignments (1 of 3)

It is important for core supporting business staff to understand Price type overrides, and how to put them into place. This mechanism allows the core staff to override the default price type a user has, and also make available special price types outside of the default four price types (Internal, External-Non-profit, External-Small Business, and External-For Profit).

Additionally, all external customers are charged External-Non-Profit by default, so the core and their supporting business staff need to make sure and add a Price Type Override to apply a For Profit status to corporate entities.

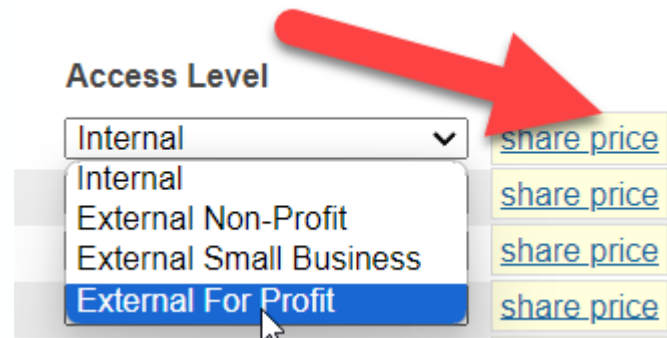
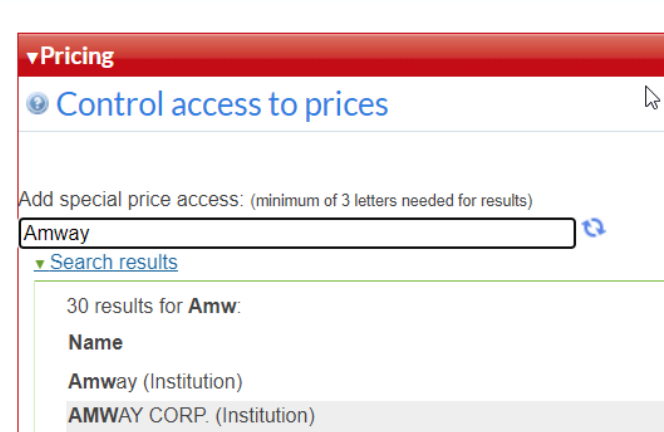
To do so, first click on the Administration Tab, and then Pricing



Core Administration-Applying Price Type Overrides

Custom Pricing Assignments (2 of 3)

Type in the name of the Lab or Institution you wish to override, and then in the right-hand column set the appropriate price type and select “share price”



Existing price overrides are listed under “existing price permissions”

[existing price permissions](#)

Name (Institute, Lab, Project or Person)	Price Granted
AM Biotechnologies, LLC:	External For Profit
AMWAY CORP.:	External For Profit

Core Administration-Applying Price Type Overrides

Custom Pricing Assignments (3 of 3)

If the core is also part of a center, you will have additional options, including applying a Center price type to the lab or institution. This is a way to allow more than the four default price types.

Access Level

Cancer Center	share price
Cancer Center	share price
Break Even	share price
Internal	share price
External Non-Profit	share price
External Small Business	share price
External For Profit	share price

If the core is part of a center, it can also set rates for these additional price types in its instrument and service settings.

Current and Future Prices

Type
Internal
Break Even
External Non-Profit
External For Profit
External CTSI Cores

Core Administration-Adding new users to iLab-External Customers

How to add a new External Customer iLab user (1 of 1)

Before External Customers can be added, a Business Partner Number (BPN) must first be established. This process of requesting a BPN is [covered here](#). An Institution will also need to be added to iLab.

To have an institution added to iLab, the business office should send an email to iLab@purdue.edu with the following information:

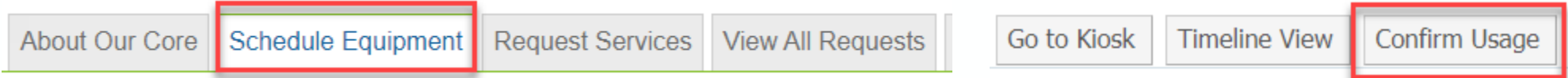
- Name of Institution:
- Business Partner Number
- Name of PI and email (the name of an initial lab owner from that institution and their email)
- Contact Email (Yes/No): If the PI will need a password set, this should be Yes (most needed if the PI will be on a Purdue campus, or directly requesting services inside of iLab). If the PI will be billed without needing system access/login, this should be No.

Once an institution is established in iLab, further institution members can add new labs, or new lab members by signing up, and choosing the Institution, or an existing lab at that institution. If a new lab with a different BPN is desired (often better for efficient billing or larger or internally divided entities), an email with the above email should be sent to ilabhelp@purdue.edu, with a subject of “Need Lab added to existing institution”

Core Administration-Confirming Usage

Confirming usage across entire core

Before they can be added to billing events, calendar events must be confirmed by core staff. To do so, select Schedule Equipment, and then Confirm Usage



You can narrow your selection by choosing individual pieces of equipment and then selecting Apply

The screenshot shows a 'Select resources' form. At the top, there is a search input field with the placeholder text 'Type a resource or category name' and a 'Show all resources' dropdown arrow. Below this, a category 'SEM/Dualbeam' is selected and expanded, showing a list of resources with checkboxes:

- FEI Nova NanoSEM (WSLR S044)
- Quanta 650 FEG (AMRS B218)
- Hitachi S-4800 Field Emission SEM (BRK 1235)
- Teneo Volumescope (WSLR S050)

 To the right of the resource list is a separate section with a dropdown menu currently set to 'Uncategorized'. Below the dropdown are two options:

- Draft equipment
- OIM PC (ARMS 232)

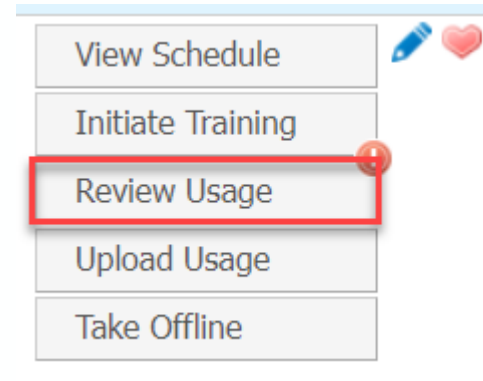
 At the bottom of this section is a large blue 'Apply' button, which is highlighted with a red rectangular box.

Core Administration-Confirming Usage

Confirming usage by individual instruments

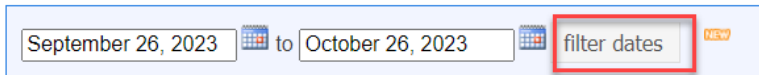
To review and confirm usage for a specific piece of equipment, select review usage, located to the right of the equipment name under Schedule Equipment.

NOTE: Equipment with unconfirmed usage will be noted with a red icon



Usage dates default to the current month. Edit and select filter dates to change time frame

Confirm Usage



Select confirm, to confirm usage reservations individually.


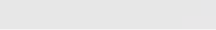


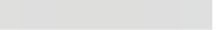


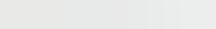

	start	end		pricing
scheduled	09:00 AM	12:00 PM		no charge: <input type="checkbox"/> Tot
logged	09:22 AM	10:00 AM	Core	adjust
billable	09:22 AM	10:00 AM	0.63 hrs	Confirm

Core Administration-Confirming Usage

Confirming usage by individual instruments

Select checkboxes to confirm multiple usage reservations at once.

OR select all checkboxes to confirm all unconfirmed usage for the equipment

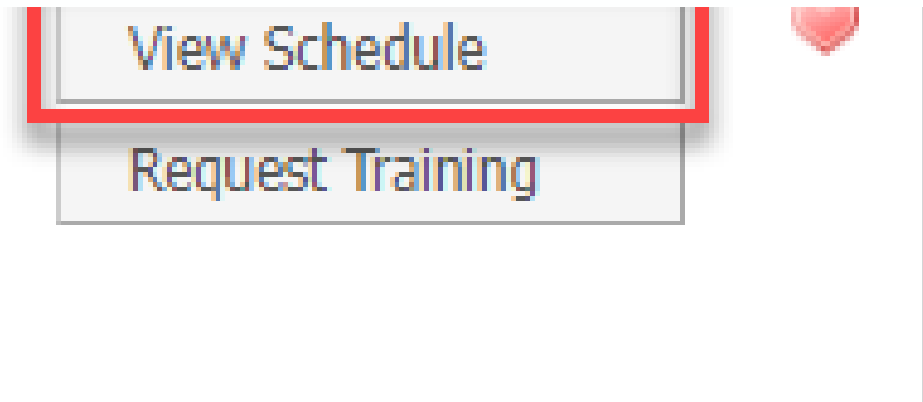
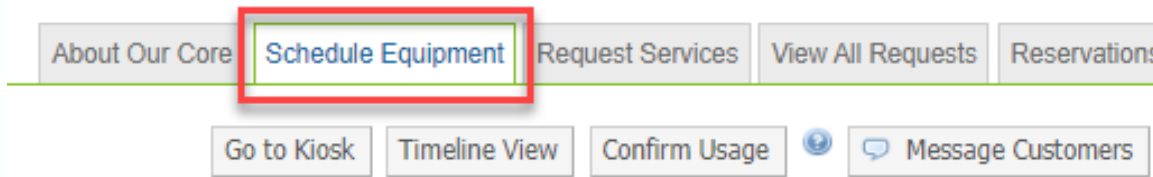
Multiple: 	<input checked="" type="checkbox"/> all
100.0% 	<input type="checkbox"/>
	
Multiple: 	<input type="checkbox"/>
100.0% 	
	
Multiple: 	<input type="checkbox"/>
100.0% 	
	

Usage dates default to the current month. Edit and select filter dates to change time frame

Core Administration-Requesting equipment reservation for users

Scheduling on core calendars (1 of 6)

In support of core operations, business office staff with core roles may be asked to request equipment reservations for internal or external parties to enable charges and otherwise support the core.



Electron Microscopy Center

In the research core you want to use equipment in, click on the Schedule Equipment Tab

Click **View Schedule** for the piece of equipment you wish to reserve time on.

If training on equipment is required, instead click **Request Training**

Core Administration-Requesting equipment reservation for users

Scheduling on core calendars (2 of 6)

Please click and drag on the calendar below to schedule time. This calendar is in (GMT-05:00) Eastern Time (US & Canada)

Day Week Month Multi View Two weeks Sunday, May 08 – Saturday, May 14

	Sun, May 8	Mon, May 9	Tue, May 10	Wed, May 11	Thu, May 12
08:00 AM					
09:00 AM					
10:00 AM					
11:00 AM					
12:00 PM					

Navigate to the desired week, locate day of the week, and click and drag to select the desired time span.

Core Administration-Requesting equipment reservation for users

Scheduling on core calendars (3 of 6)

03:00 AM - 05:00 AM Create Reservation

The screenshot shows a reservation form with the following elements:

- Event Type:** A dropdown menu set to "Reservation".
- Search within:** A group of radio buttons with options "Current Customers" (selected), "This institution", and "All". A red box and the number "1" highlight this section.
- Customer:** A dropdown menu showing "Hugh A Gardner" with details: "Gilpin, Christopher (PUR) Lab (+5)", "hgardne@purdue.edu", and "951-809-1881". A red box and the number "2" highlight this section.
- Lab:** A dropdown menu showing "Gilpin, Christopher (PUR) Lab". A red box and the number "3" highlight this section.
- Buttons:** "Cancel" and "Next" buttons at the bottom right.

1. Change scope of search (Current customers displays people who have used the core, This institution will show current Purdue users. All will show all iLab users across the world).
2. Select the user who you are reserving this piece of equipment for (only current users will display, the system does not import all current Purdue employees and attendees automatically)
3. If the user has more than one lab, select the appropriate lab. If the user only has one lab affiliation, this will automatically populate.

Core Administration-Requesting equipment reservation for users

Scheduling on core calendars (4 of 6)

The screenshot displays a reservation interface with two main sections. The top section, titled "Required forms", contains a message: "There are no forms required to make this reservation." The bottom section, titled "Reservation details", provides information about the reservation: "For: NovaNanoSEM (logged time) - Self Use \$32.00/hr - My Reservation", "Lab: [Bryant, Frances \(PUR\) Lab](#)", and "Created on: May 10, 2016 15:13". Below this information is an "Event Notes" field with a text input area and a dropdown menu currently set to "note visible to any".

Required forms contain any forms required prior to use of the equipment.

Review the **Reservation Details** and Add any Event Notes if the reservation required special instructions.

Core Administration-Requesting equipment reservation for users

Scheduling on core calendars (5 of 6)

Times	
Scheduled:	May 11, 2016 11:00 AM - May 11, 2016 01:00 PM
Logged:	05/11/2016 11:00 AM - 05/11/2016 01:00 PM
Billable:	05/11/2016 11:00 AM - 05/11/2016 01:00 PM

Review **Times** of reservation

Use and cost of reservation	
May 11 '16 11:00 - 13:00	Self Use \$32.00/hr
Total: \$64.0 (2.0 hours)	

Review **Use and cost of reservation**

Payment information:	
Please enter the Account String	
%	Account String
1 100.0	%21010000-8000000109 501 1063-9005 (Expires on December 31, 2075)
100.0%	total allocated
split charge	

Many users have a default account assignment.

Review **Payment information** to ensure the proper account will be charged for this reservation.

If the account the User intends to charge does not appear, contact your home Business Office

Core Administration-Requesting equipment reservation for users

Scheduling on core calendars (6 of 6)

Payment information:

Please enter the Account String

	%	Account String
1	50	%21010000-8000000109 501 1063-9005 (Expires on December 31, 2075)
2	50	%21010000-8000001517 500 1063-8000 (Expires on December 31, 2075)

100% total allocated

split charge

To split charges among multiple accounts, click Split Charge and allocate to each account by percentage.

Note: Only authorized accounts are displayed, and charges cannot be split to multiple labs.

Invite additional people to this event by email

Please enter a comma separated list of valid email addresses

To notify a user in addition to the facility of this reservation, add their email address

Save Reservation Cancel Changes

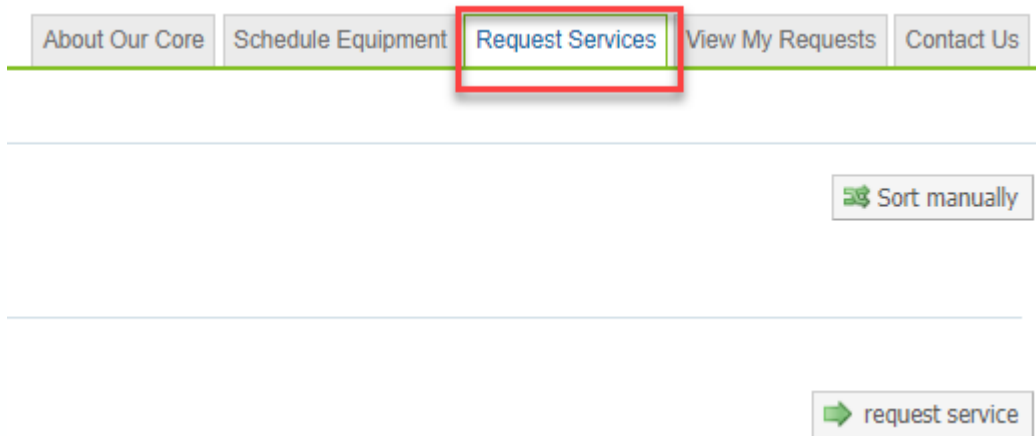
Delete Reservation

- Click **Save Reservation** to submit
- Click **Cancel Changes** or **Delete Reservation** if you need to start over.

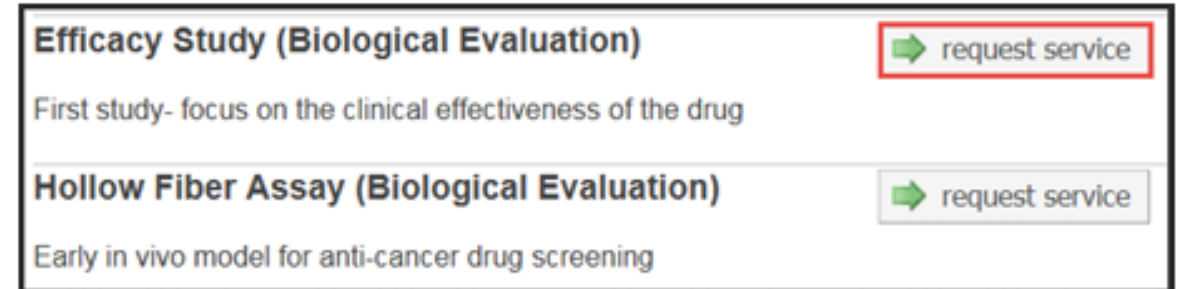
Core Administration-Requesting services for users

Requesting core services (1 of 4)

In support of core operations, business office staff with core roles may be asked to request services for internal or external parties to enable charges and otherwise support the core.



On the core landing page, click on the Request Services tab.



Locate the desired service and click the corresponding **request service** button.

Core Administration-Requesting services for users

Requesting core services (2 of 4)

Blastocyst Injection of ES Cells

person

Hugh A Gardner Gilpin, Christopher (PUR) Lab (+5) hgardne@purdue.edu 951-809-1881

search within: current customers this institution All

lab Gilpin, Christopher (PUR) Lab

➔ Proceed

1. Change scope of search (Current customers displays people who have used the core, This institution will show current Purdue users. All will show all iLab users across the world).
2. Select the user who you are reserving this service for (only current users will display, the system does not import all current Purdue employees and attendees automatically)
3. If the user has more than one lab, select the appropriate lab. If the user only has one lab affiliation, this will automatically populate.

Core Administration-Requesting services for users

Requesting core services (3 of 4)

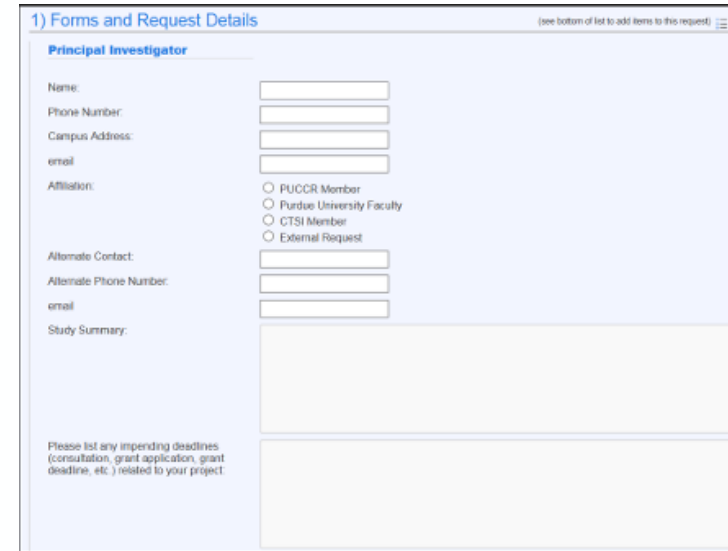


Blastocyst Injection of ES Cells

Request Name:

Customer: Stella Price **Lab:** Bryant, Frances (PUR) Lab
Email: stella.price@ilabx.com **Phone:**

The request is named according to the name of the core and the user submitting the request.



1) Forms and Request Details (see bottom of list to add items to this request)

Principal Investigator

Name:

Phone Number:

Campus Address:

email:

Affiliation: PUCR Member
 Purdue University Faculty
 CTSI Member
 External Request

Alternate Contact:

Alternate Phone Number:

email:

Study Summary:

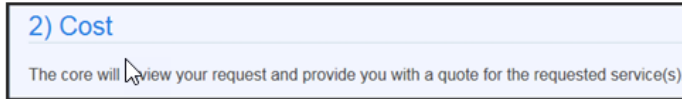
Please list any impending deadlines (consultation, grant application, grant deadline, etc.) related to your project

Any form(s) required from the core are listed.

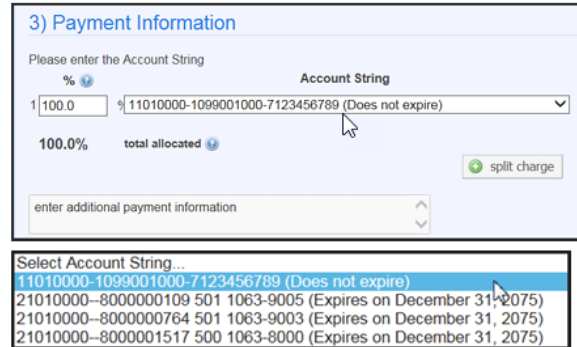
Complete all fields.

Core Administration-Requesting services for users

Requesting core services (4 of 4)



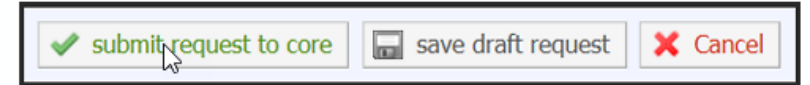
Depending on the service request and core, the cost may display based on information and selections from the form or the core may review the request and return a quote to the user.



Select correct account from drop-down menu to complete **Payment Information**.

To split charges between multiple accounts, click **split charge** and enter the allocations by percentage.

NOTE: Only accounts for which the user is authorized will be available for selection.



Click **submit request to core** to submit to lab for review.

If request is not yet complete, click **save draft request** to hold and submit at a later time.

To cancel request, click **Cancel**.

Center Administration

Center Administration Overview

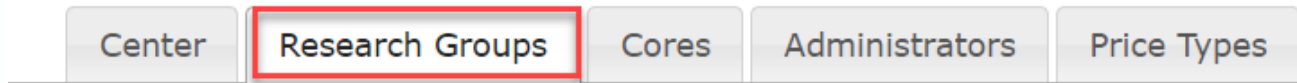
Centers in iLab are groups of users receiving special rates based on member qualification for subsidized rates or use privileges for a Core(s). Because Centers use subsidized rates typically coming from a Department or are for a specific funding initiative, care must be taken to ensure membership is restricted to qualifying labs.

- i. Center rates using a subsidy should be discussed with the Business Manager of the Core's Department and approved by Managerial Accounting and the Income Producing Committee.
- ii. Core Administration should keep a current list of Center members and document appropriate approval of membership is completed to ensure fair costing practices are exercised and access to Department subsidy or restricted fund is appropriate to the member.


Center membership requires additional settings in iLab and should be done only in collaboration with iLab campus support (iLabhelp@purdue.edu).

Adding Center Member Labs

How to add Centers Member Labs



To add a new Research Group (PI lab), select the Research Groups tab

Search for a Group: 

- [Gilpin, Christopher \(PUR\) Lab](#)
- [Gilpin, Dawn \(ASU\) Lab](#)
- [Hays-Gilpin, Kelley \(NAU\) Lab](#)

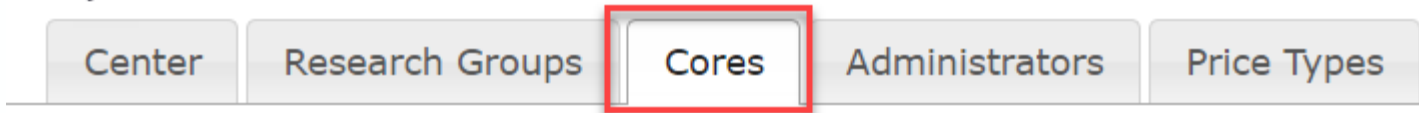
Bulk upload

[Goto Research Group Bulk Upload](#)


Then enter the last name of the PI lab (or full name if a staff lab) and select as appropriate. You will note that non-Purdue labs can be added to Centers. This is to allow the granting of special Center pricing (such as Cancer Center, CTSI, or other multi-institution research consortiums).

Adding Center Member Cores

How to add Center Member Cores




To add a new member Core, select the Cores tab

Search for a Core: 

Core Name
Purdue Sandbox Core A (5029)

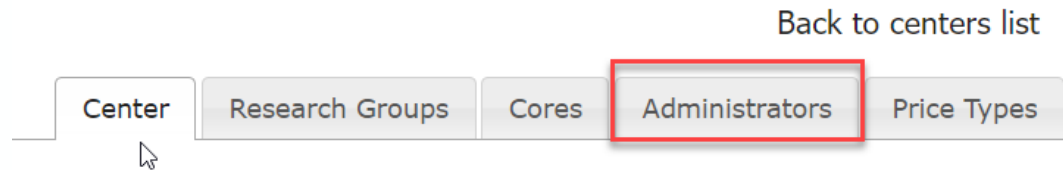
Add

 Add

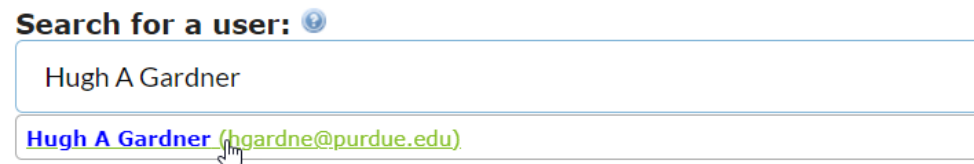
Then enter the name of the new member Core, and select Add. Once a member core has been added, it can access any Center Price Types and provide them to users in their cores (limited by membership in Center member labs)

Adding Center Administrators

How to add Center Administrators



To add a new Center administrator, first click on Administrators tab in the Centers interface (chosen from My Centers)



Use the Search for a user field at the bottom of the screen, typing in the desired user's name (in most cases Firstname Lastname, or Firstname, Middle Initial, Lastname will return the user (who must be an existing, registered user). Click on the name and it will add that user as an administrator.

How to get help with iLab

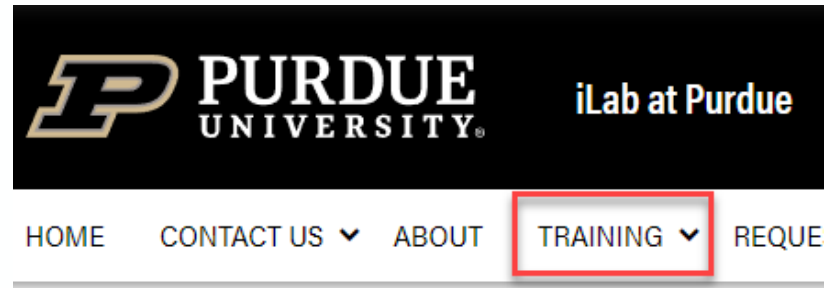
Resources for iLab At Purdue

Campus Email



One of the easiest ways to request help in iLab, is to email ilabhelp@purdue.edu, which will generate a support ticket and alert our team members, who will swiftly respond and provide assistance.

iLab Support site



iLab At Purdue maintains a support site (Purdue.edu/ilab) with a library of Training Quick Reference Cards (QRCs), as well as other iLab related information.

Drop in support sessions



- The iLab At Purdue support team has daily, drop-in support sessions (held using Microsoft Teams). Sessions can be entered by clicking the links on the [iLab support page](#), launching a session during the listed times.

Conclusion

Summary

This document presentation was intended to Business Office staff a concise overview of iLab, and assist them in the task they may need assistance with in using or interacting with iLab.

Additional Trainings

Additional presentations covering Billing Events and Corrections, and iLab Reporting are also available.

Similar presentations are available for student and staff lab members, and research/recharge core staff and administrators.

Questions

If you need additional assistance or would like to discuss the wider capabilities of iLab, please reach out to the iLab At Purdue support team at ilabhelp@purdue.edu.

Thank You

iLab At Purdue team, ilabhelp@purdue.edu

