University of Tennessee Health Science Center – PI/ PI Business Manager Manual

As a PI or PI's Business Manger, your main role within iLab is to manager funds within your lab, manage lab members, approve request if needed, and view and approve invoices. This manual will help you navigate through those areas with iLab. For more general 'how to use iLab' documentation, please visit http://help.ilab.agilent.com/.

Contents

Registration and Login Process

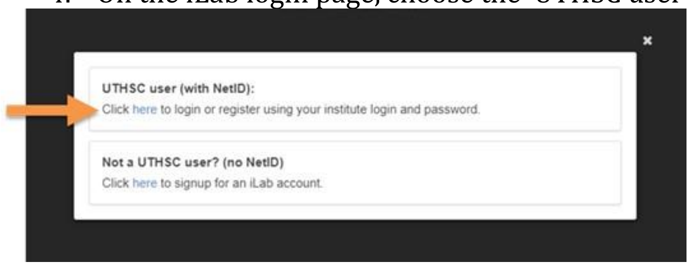
Principal Investigator (PI):

If you are a PI that owns a sponsored fund your account will be created for you automatically through the nightly fund file that IRIS send iLab. When iLab receives this file, your account and a lab will be created for you. The lab is where all your lab members and funds will live. To check if your account was created in iLab follow the login steps. If you are brought to a registration page, you will stop there and contact Steve Wills (**jswills@uthsc.edu**). If you are logged in, then your account has been created for you automatically.

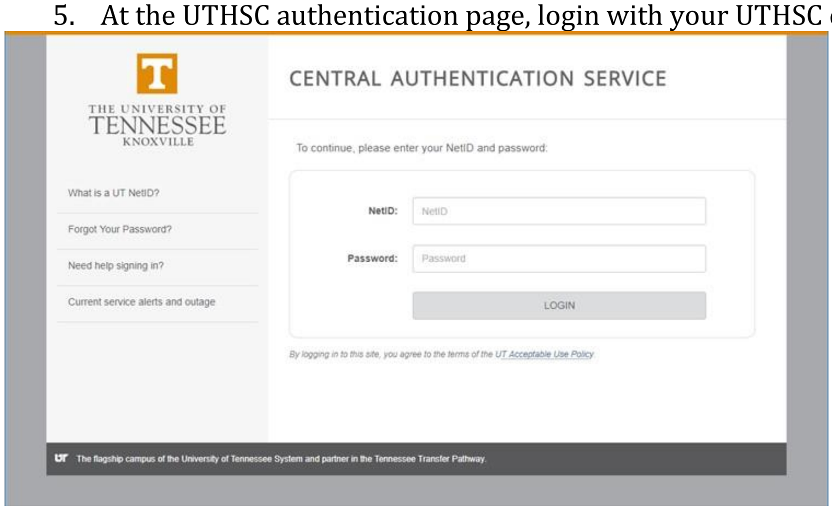
PI's Business Manager:

1. Navigate to the following URL into your browser: https://uthsc.ilab.agilent.com/account/login
2. Bookmark this URL for future use.
3. Click on the "sign-up" link.

4. On the iLab login page, choose the 'UTHSC user (with NetID):" link



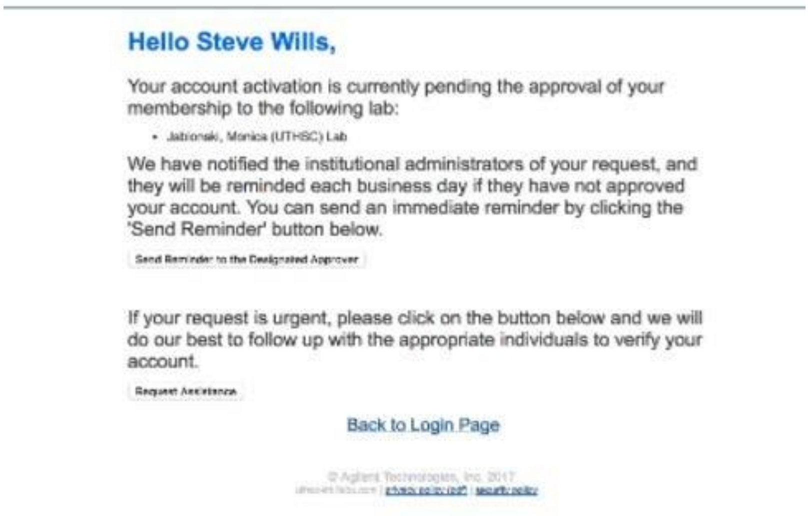
5. At the UTHSC authentication page, login with your UTHSC credentials



a. Once you authenticate you will be directed to a registration page

i. First, select the appropriate PI from the drop down menu

ii. Your first name, last name, and email address will be pre-filled. Complete any remaining fields that have not been pre-filled, such as phone number.
iii. Click 'Register.' The next page you see will be the "Greeting Page."
iv. At this point the PI you selected has been sent an email informing them that they need to approve your account.



v. The PI is reminded each business day but you have the opportunity to send an additional reminder.
vi. Once your account has been approved you will receive an email to notify you.

6. Now you can login and utilize the core facilities within iLab
7. Once logged in you will be on the iLab homepage dashboard. Make sure to set your time zone!

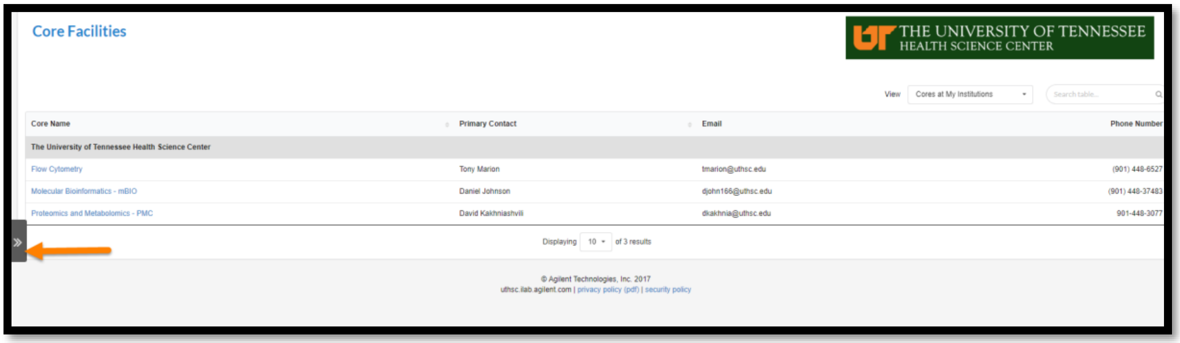
How to login to iLab:

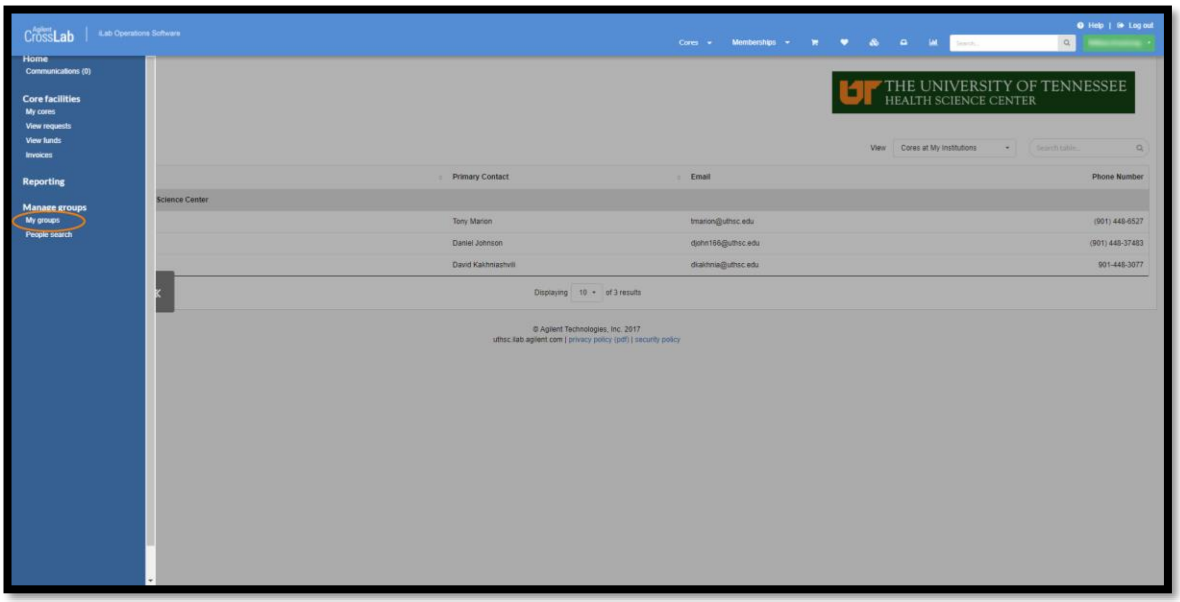
1. Navigate to institution URL: https://uthsc.ilab.agilent.com/account/login
2. Click the green login button in the upper right hand corner.
3. Choose the option to login as a UTHSC user (with NetID).
4. You will be brought to a UTHSC authentication page where you will enter your NetID and password.
5. Click Login.

Navigating to your Lab/Research Group

Labs within iLab hold all the members and funds associated with that PI. Within your lab you will be able to manage your users, assign and un assign funds to members, and request access to other funds.

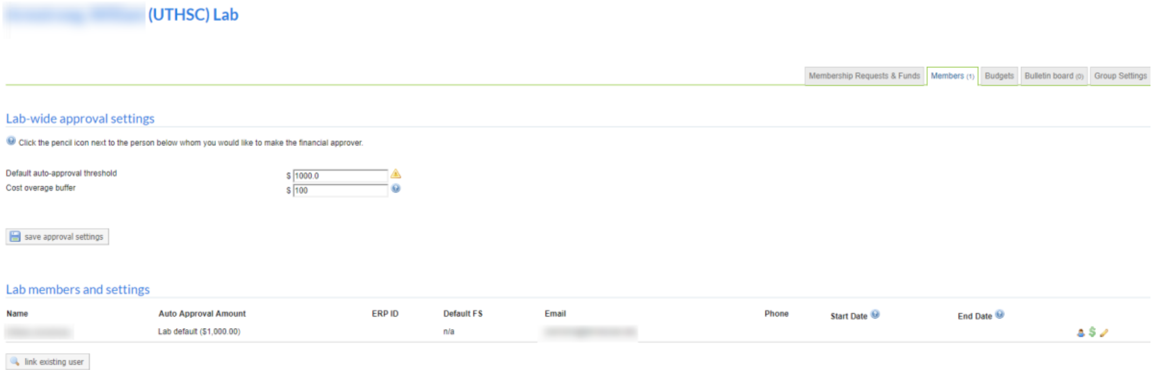
To navigate to your lab or any labs that you manage, click the grey tab on the left side of your page to expand your task bar. Within your task bar click 'My groups.' This will show any groups that you are a PI or manager of. If you are an owner of a sponsored fund you will see a lab titled LastName, FirstName (UTHSC) Lab (eg. Smith, John (UTHSC) Lab). You can think of this as your home lab. If you also have non-sponsored funds you will see a lab titled Fund Approver (UTHSC) Lab. This is your secondary lab, which you will not have to manage.



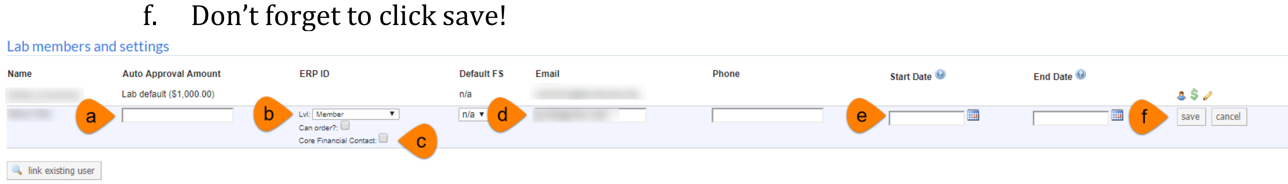


Managing your Lab Members

Within your LastName, FirstName (UTHSC) Lab, the ‘Members’ tab will show all the members, including any managers of your lab.



1. Lab-wide approval settings: If a project request within a core facility goes above the amount set in the ‘Default auto-approval threshold’ setting, you or the financial contact of the lab will have to approve the request. Note: This does not affect reservations on equipment.
    a. As an institution, UTHSC has set $1,000 as the auto-approval threshold. As a PI or manager of a lab you have the ability to set a threshold at your lab level which will override the institution amount.
2. Lab members and settings: This will show all members of your lab. To edit the settings of a member click the yellow pencil to the right
    a. You can set an auto approval amount at the member level which will ignore the institution and lab level settings.
    b. Lvl: Allows you to set this person as a member, manager, or principal investigator
        i. PIs will have to set their Business Manager as a manager of their lab
    c. Then you can check if the person is also a financial contact. By default this is the PI and is noted by a green dollar sign
    d. Email address will appear here but should only be changed by the lab member in their profile settings.
    e. Start and End date allow you to set a date range of when this person is/will be a part of your lab.
        i. Once the end date arrives, this person will be removed from the lab
        ii. These are not required fields
    f. Don’t forget to click save!



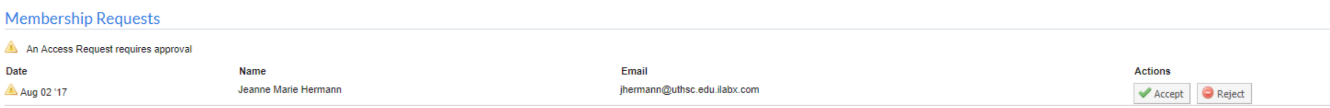
3. Link existing user: If you need to add a user to your lab who already exist in iLab, you can utilize the link existing user tool.
    a. Once you link the user, don’t forget to assign them a fund.

How to Manage Funds

To manage funds within your lab navigate to the ‘Membership Request & Funds’ tab. This tab is where you can accept/deny people from your lab, assign or un assign fund, and request access to additional funds.

Membership Request:

When a new user registers with iLab, they are required to choose who their PI is. When your lab member registers against you, the request will need to be accepted or rejected by you or the lab manager. You will receive an email notification when a user has registered against your lab. You can either follow the link within the email or directly login to iLab and view the ‘Membership Request’ section within your lab.

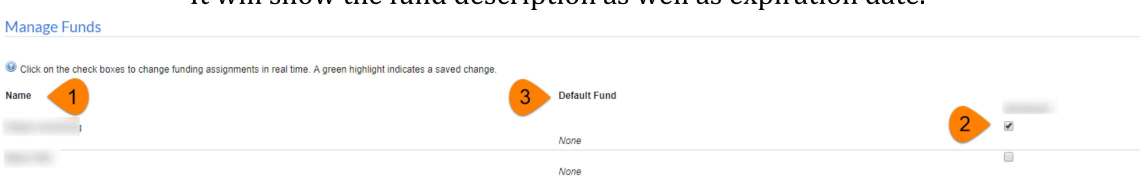


1. This will show you the name and email address of the user that is requesting access to your lab.
2. Click accept to the right if this person is part of your lab.
3. Next step is to assign that new user a fund to use within a core.
    a. If you do not assign the user a fund they cannot make a reservation or project request within a core facility.

Manage Funds

The fund grid within the ‘Manage Funds’ section will show all sponsored and non sponsored funds within your lab. By default only sponsored funds will automatically be routed to your lab from the nightly fund file sent to iLab from IRIS. If you have non sponsored funds, you will need to request access to those.

1. You will see a list of all members within your lab within the fund grid
2. All funds will be listed on the right hand side and each user will have a check box for each fund.
    a. You can hover over the fund to view additional information about the fund. It will show the fund description as well as expiration date.

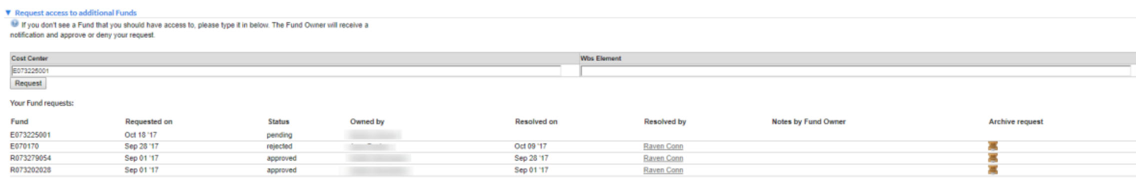


    b. If a fund is within 30 days of expiring the fund will appear in orange text. If the fund is expired it will appear red.
        i. Any funds that are expired cannot be used by a user within a core facility for any new services. Expired funds can be charged for services requested prior to the fund's expiration date. Those charges can be billed for a period of 60 days after the fund expires.

    ii. Once IRIS stops providing that expired fund in the nightly fund file, the fund will be removed.
  c. To assign a member a fund you simply click the appropriate check box.
3. If your lab has multiple funds and a lab member is assigned to multiple funds, you can set a default fund.
  a. This will be the default option that appears when the user is making a reservation or request within a core.

Requesting Access to Additional Funds

If there are additional funds you need access to, such as your non sponsored funds, you will request access to those funds.



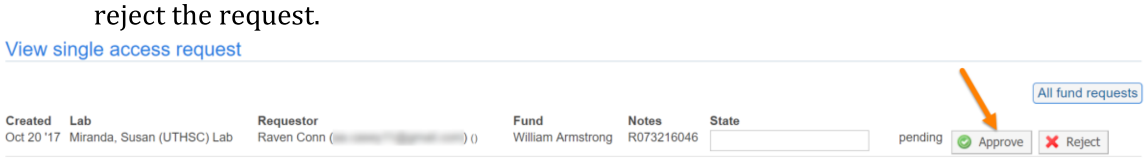
1. Enter the fund into the appropriate field, Cost Center or WBS Element. Then click request.
2. Your request will be sent to the fund owner.
  a. If this is your non sponsored fund and you are the fund owner you can approve it yourself by following the same steps in the next section.
  b. If you are not the owner, the fund owner must approve the request
3. In the 'View Fund Request' section you can see the details of your request, including who the fund owner is.

How to Manage Fund Request

As a PI, you may be the fund owner of multiple funds that other PIs can request access to. If another PI request access to a fund you are the owner of you will receive an email notification.

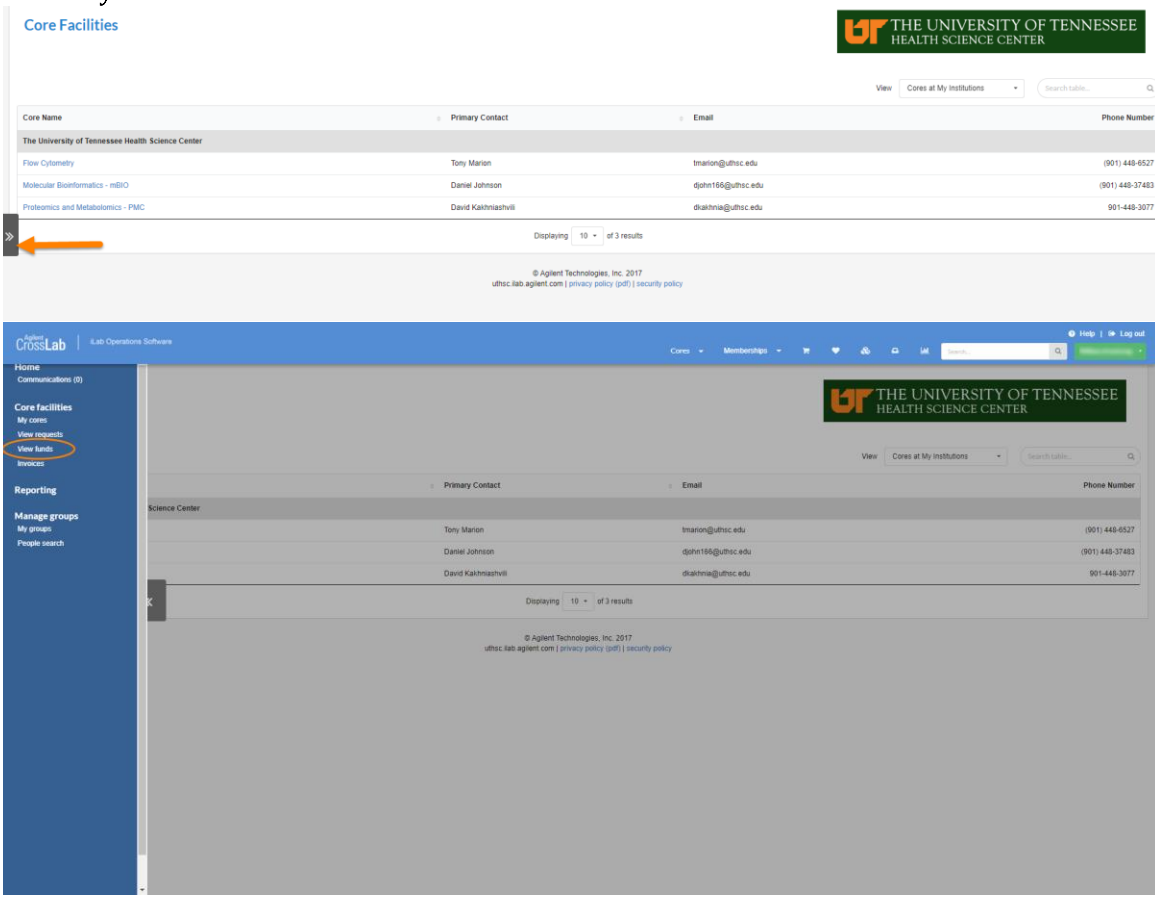
1. The email notification you receive will come from iLab No Reply. Within the email there will be a link.

2. This link will take you to the single fund access request where you can accept or reject the request.



You can also complete this action by navigating through the steps below.

1. Click the grey tab to expand you task bar. Then you will select ‘View funds’ from your task bar.

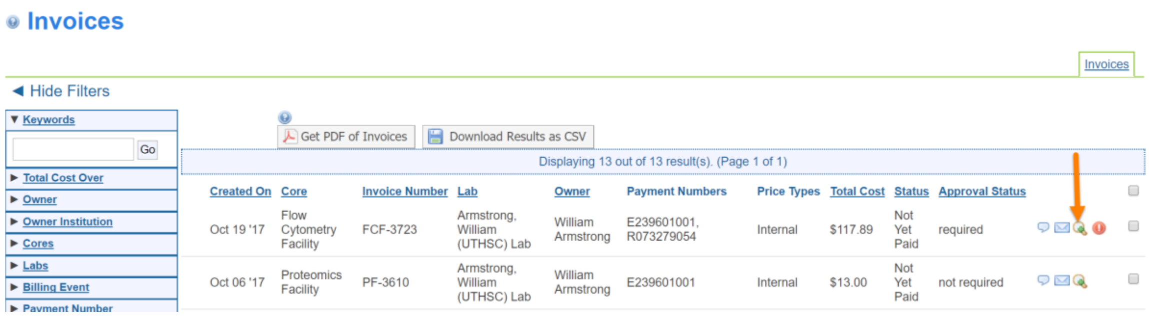


2. Within ‘Pending Access Requests’ you will see all requests that you are the fund owner of.
3. Select ‘Accept’ or ‘Reject’ next to the appropriate request.
4. Navigate back to your lab to view the fund within the lab.

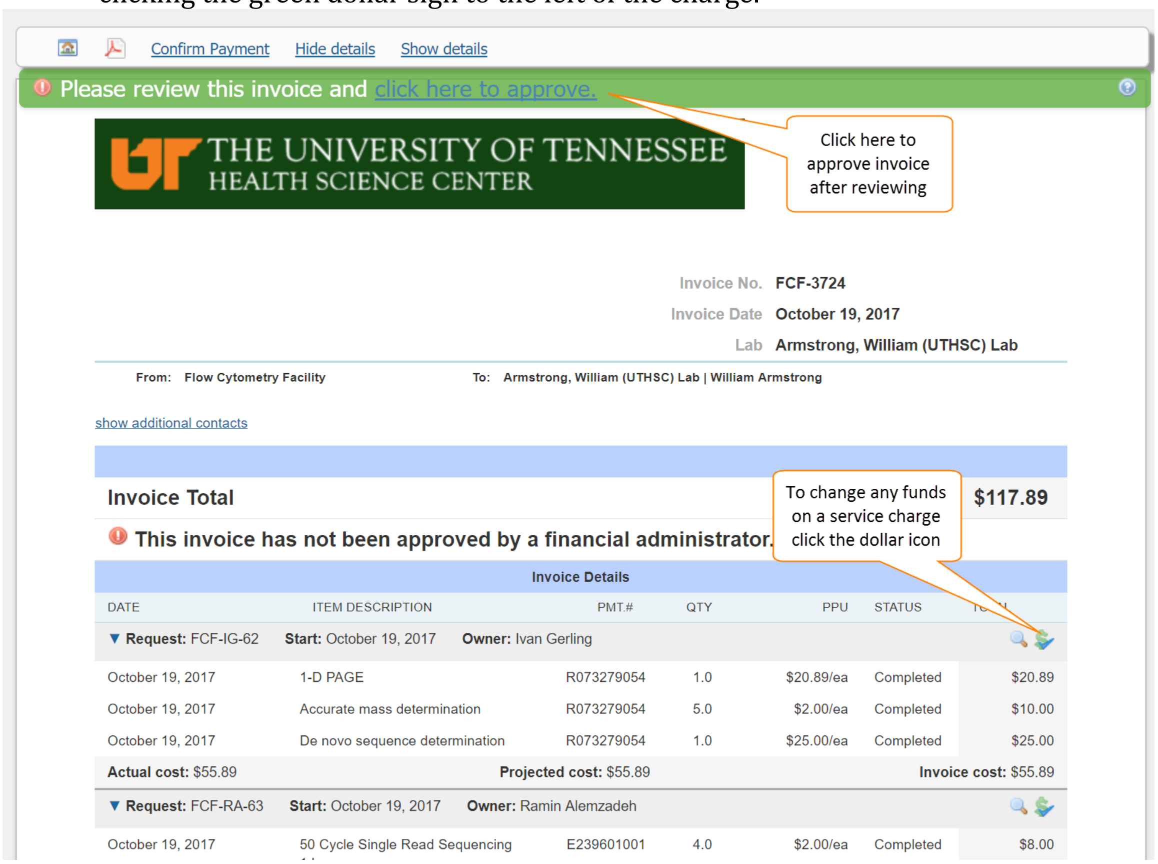
Viewing Invoices

On the 8th of each month the core’s business manager will create a billing event which includes all the charges from lab members within a core facility. This billing event will generate invoices which will be sent to each PI that has charges for that month. You will have 5 days to review the invoice and approve. If you do not approve the invoice within 5 days, by the 13th, the core business manager will mark it as approved.

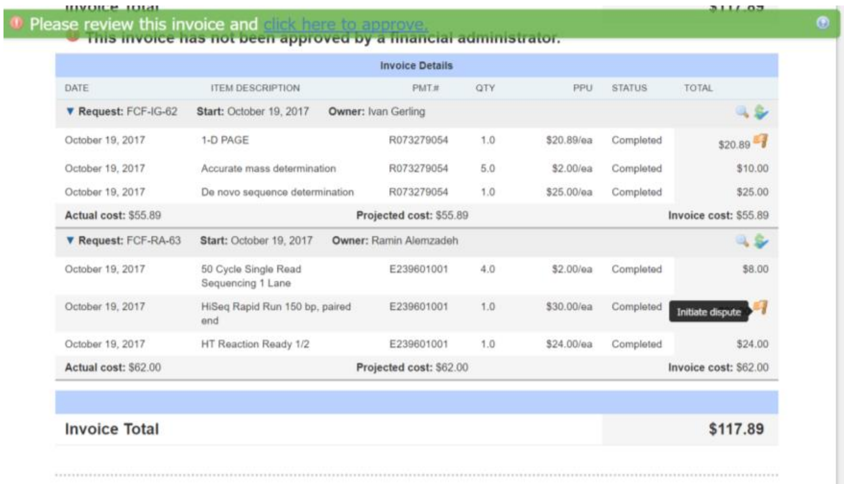
1. To view your invoices you can follow the link you receive in an email notification or within iLab you can click ‘Invoices’ in your task bar to the left.
2. This will show a list of all invoices within iLab.
3. To view the invoice click the magnify glass to the right of the appropriate invoice.

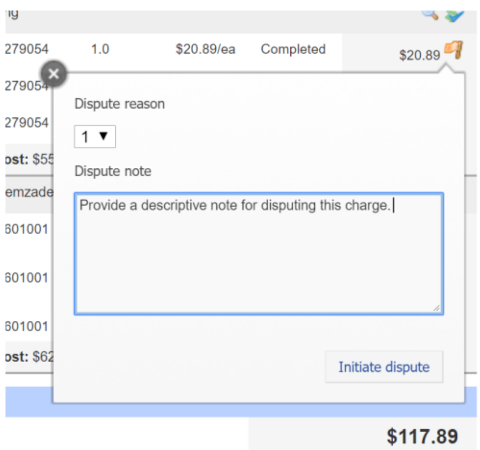


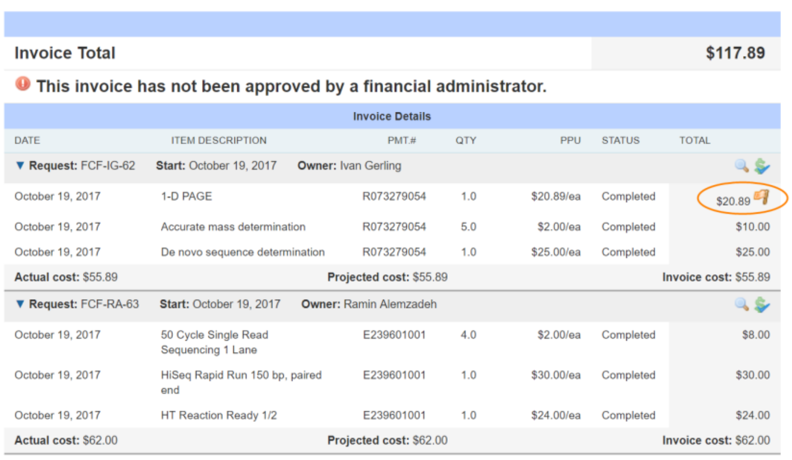
4. Each invoice will show all charges within one core for all lab members.
5. Within the invoice there will be a green bar that will allow you to approve the invoice. If the 5 days has past, the invoice will not have this option.
6. Within the 5 days you can make changes to the fund that is used on the invoice but clicking the green dollar sign to the left of the charge.



7. If any charges need to be disputed, hover your mouse over the cost of the service and an orange flag will appear to click on.
    a. A small window will appear which will require you to select a reason from a drop-down menu of why this charge is being disputed. Then you can provide descriptive notes.
    b. Click 'Initiate Dispute'
    c. The orange flag will then appear next to the charge that has been disputed.
    d. Next the core directory or business manager will resolved the dispute.







8. Once your charge dispute has been resolved you will see a green flag on your invoice list view.

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Displaying 13 out of 13 result(s). (Page 1 of 1)

Created On	Core	Invoice Number	Lab	Owner	Payment Numbers	Price Types	Total Cost	Status	Approval Status
Oct 19 '17	Flow Cytometry Facility	FCF-3724	Armstrong, William (UTHSC) Lab	William Armstrong	E239601001, R073279054	Internal	$117.89	Not Yet Paid	required
Oct 06 '17	Proteomics Facility	PF-3610	Armstrong, William (UTHSC) Lab	William Armstrong	E239601001	Internal	$13.00	Not Yet Paid	not required

9. Next you will need to approve your invoice. You can do this within your actual invoice or by clicking the red circle in your invoice list.
    a. Once your invoice has been approved it will show a green check mark next to your invoice.

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10. On the 14th of the month the core business manager will mark all invoices as approved, if not already done so. Then they will send the billing file to IRIS. Once the billing file is sent to IRIS, all charges will be marked as paid. At this point you will need to look with IRIS to check the status of the charges.

For further information about your role as a PI or PI Business Manager, visit our **help site.**