

iLabs: General Info, Tips, and Tricks

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28 September 2023

2023 SYMPOSIUM
FOR RESEARCH ADMINISTRATORS

Contact Info

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Access requests, troubleshooting, etc.

Additional individual or group training as requested

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Presentation Overview

1. Describe the different entities within iLabs
2. List available roles and responsibilities
3. Identify user icons and special icons
4. Lab manager vs. department manager
5. Adding CFS and granting access
6. How to add a lab to a department

Entities in iLabs



Institution



Core Facility / Shared Resource



Lab/Group



Department



Center

User Roles in iLabs



Institutional Administrator



Principal Investigator (PI)



Lab/Group Manager



Lab/Group Member



Core Administrator








Core Member



Core Customer

iLabs User Icons

-  | PI or a lab member
-  manager
-  financial contact
-  edit a user's role/rights
-  remove/delete a user

Lab Manager VS Department Manager

Task/Responsibility	Lab Manager	Department Manager
Add Personnel to Lab	X	X
Grant Access to a CFS	X	X
Designate Financial Contact	X	X
Add Labs/PI's to Department		X
Add Department Managers		X
Approve Lab access requests	X	X

Lab Funding Sources



Sponsored CFS

Imported from Ramses

No action required from PI or lab

Assigned to the project PI's lab



Non-Sponsored CFS

Imported by OSP

Email coresupport@med.unc.edu

Provide CFS title, PI Name, and full CFS

Coming Soon



Institutional Landing
Page



Subsidies Function
(available now!)



Collaborating Cores
(available now!)



Training material via
OSP RCD Webpage

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Live Demo

- Adding a lab to a department
- Adding a user to a lab/group
- Checking access to a CFS in a lab
- Hovering over icons

Questions?



How do you see and review invoices within iLabs if you are a user but not the PI?





THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Customers and accounting go to the hamburger Icon and select invoices. This allows you to look up invoices for your requests or for labs you are designated in as the financial contact.

Invoice Lookup for Customers and Accounting

Hamburger Icon

The screenshot displays the iLab Operations Software interface. The top navigation bar is blue and contains the Agilent CrossLab logo, the text "iLab Operations Software", a search bar, and user information for Michael Akridge. A red box highlights the hamburger icon in the top left corner, with a red arrow pointing to it from the text "Hamburger Icon". The left sidebar menu is dark blue and lists various navigation options: Home, Core Facilities, My Centers, Reporting, and Manage Groups. The "Invoices" option under "My Centers" is highlighted with a red box. The main content area shows an "Equipment Search" section with a search input field and a status bar indicating "58 researchers are seeking access to 49 labs you manage". The footer contains contact information and copyright details.

Hide Filters

1

▼ **Keywords**

Go

- ▶ Total Cost Over
- ▶ Owner
- ▶ Owner Institution
- ▶ Cores
- ▶ Labs
- ▶ Billing Event
- ▶ Payment Number
- ▶ Price Types
- ▶ External
- ▶ Approved By
- ▶ Approval Status
- ▶ Status
- ▶ Invoices Sent
- ▶ Receive Hard Copy
- ▶ Dispute status
- ▶ Detached
- ▶ Refunds
- ▶ Date Created
- ▶ Past Due

Apply Filters

Reset Filters

2

>> [Get PDF of Invoices](#) [Download Results as CSV](#) [Email Admins with Access to Invoices](#) [Generate Aging Report](#) [Mark selected invoices as](#) Update status

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 14018 result(s). (Page 1 of 468)

Created On	Core	Invoice Number	Lab	Owner	Payment Numbers	Price Types	Total Cost	Past Due	Status	Approval Status	
Sep 13 '23	The MLI Tissue Procurement and Cell Culture Core	MLI TC-3997592	Jaspers, Ilona (UNC-CH) Lab	Ilona Jaspers	25210-49000-426601-5110030----	Internal unc-ch	\$121.00	0 - 30 days	Not Yet Paid	not required	<input type="checkbox"/>
Sep 13 '23	The MLI Tissue Procurement and Cell Culture Core	MLI TC-3997591	Moorman, Nathaniel (UNC-CH) Lab	Lisa Best	25236-49400-422501-5124449----	Internal unc-ch	\$242.00	0 - 30 days	Not Yet Paid	not required	<input type="checkbox"/>
Sep 13 '23	The MLI Tissue Procurement and Cell Culture Core	MLI TC-3997593	Wolfgang, Mathew (UNC-CH) Lab	Kym Thacker	25210-49900-426401-5127607----	Internal unc-ch	\$596.00	0 - 30 days	Not Yet Paid	not required	<input type="checkbox"/>
Sep 13 '23	The MLI Tissue Procurement and Cell Culture Core	MLI TC-3997589	Kesimer, Mehmet (UNC-CH) Lab	Mehmet Kesimer	25210-49200-413804-5129023----	Internal unc-ch	\$265.64	0 - 30 days	Not Yet Paid	not required	<input type="checkbox"/>
Sep 13 '23	The MLI Tissue Procurement and Cell Culture Core	MLI TC-3997590	Kelada, Samir (UNC-CH) Lab	Samir Kelada	25210-49000-423501-5124653----	Internal unc-ch	\$689.00	0 - 30 days	Not Yet Paid	not required	<input type="checkbox"/>
Sep 13 '23	Metabolomics and Exposome Laboratory Service Core (MEL)	MAELSC-3997244	Krupenko, Sergey (UNC-CH) Lab	Sergey Krupenko	25210-49000-633300-5121665----	Internal unc-ch	\$17,250.00	0 - 30 days	Not Yet Paid	not required	<input type="checkbox"/>
Sep 12 '23	Metabolomics and Exposome Laboratory Service Core (MEL)	MAELSC-3996002	Graves, Lee (UNC-CH) Lab	Lee Graves	25210-49000-424001-5118902----	Internal unc-ch	\$2,250.00	0 - 30 days	Not Yet Paid	not required	<input type="checkbox"/>

3

- 1 = Filter: Use to filter out data points
- 2 = Bulk Actions: Actions that can be performed on all invoices
- 3 = Invoice List

If you know your invoice #, then type in your invoice # here and then click "Go"

Hide Filters

- ▼ Keywords
- ▶ Total Cost Over
- ▶ Owner
- ▶ Owner Institution
- ▶ Cores
- ▶ Labs
- ▶ Billing Event
- ▶ Payment Number
- ▶ Price Types
- ▶ External
- ▶ Approved By
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- ▶ Invoices Sent
- ▶ Receive Hard Copy
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Reset Filters

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1. If you do not know your invoice #, then use the other filters to narrow down your search

Hide Filters

- ▼ Keywords
- Go
- ▶ Total Cost Over
- ▶ Owner
- ▶ Owner Institution
- ▶ Cores
- ▶ Labs
- ▶ Billing Event
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>> Get PDF of Invoices Download Results as CSV Email Admins with Access to Invoices Generate Aging Report Mark selected invoices as Update status

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Apply Filters

Reset Filters

2. Then click Apply Filters

Invoice lookup screen icons

0 - 30 days	Not Yet Paid	not required	    <input type="checkbox"/>
0 - 30 days	Not Yet Paid	not required	    <input type="checkbox"/>
0 - 30 days	Not Yet Paid	not required	    <input type="checkbox"/>
0 - 30 days	Not Yet Paid	not required	    <input type="checkbox"/>
0 - 30 days	Not Yet Paid	not required	    <input type="checkbox"/>
0 - 30 days	Not Yet Paid	not required	    <input type="checkbox"/>

-  = Add Comments
-  = Send Email
-  = View Invoice
-  = Update Status

completed: Aug 20

▶ Aug 21 (Aug 21 2023)	Conner Breen Dominguez, Daniel (UNC-CH) Lab	UNCFCCF-CB-20070 Sorting Request Sorting 	Completed Consultation about Sorting Project - Finished	\$424.00 (\$520.00)	\$0.00	\$520.00	
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completed: Aug 25

▼ Aug 21 (Aug 21 2023)	Sierra McDonald Gupta, Georav (UNC-CH) Lab	UNCFCCF-SM-20069 Introductory Trai... Introductory Training	Completed	\$75.00 (\$75.00)	\$0.00	\$75.00	
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completed: Aug 21

▶ Overview [edit](#)

▶ Payment Information [update payment information](#)

▼ Forms and Request Details [\(see bottom of list to add items to this request\)](#)

▶ Aug 21 01:27 PM	Introductory Training Training		Quantity: 1.0	Unit Price: \$75.00	Ext. Price: \$75.00	Tax: \$0.00	Total: \$75.00	Billing Status: Billing Initialized	Work Status: Completed	
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[View Form: Introductory Training Lecture Request Form](#) [Visible](#) [Completed](#)

[add service](#) [add charge](#) [add form](#) [add milestone](#) [sort manually](#) [add event](#)

[Build a quote, or add components to a new or running request using the 'add' links above.](#)

[Generate PDF quote](#)

Comments [add comment](#) [Attachments & URLs](#) [add attachment](#) [add url](#)

▶ Service Request History [add to history](#)

▶ Billing Information [edit](#) ▶ Shipping Information [edit](#)

Core facilities can look at invoices from the service requests screen for requests line items that have been billed.

1. Open a billed service request, go to the line item billed.

2. Click on the view invoice icon.