What is iLab?

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Where can I get more information on sample submission and starting the iLab process?

Who do I contact if I cannot remember my password, do not see my WSU index numbers (for WSU users paying with WSU index only), or have problems requesting a service in general?

What is the rule for creating iLab accounts for WSU users? This applies to WSU users only.

I have an alternate email address that I prefer to use. How do I make sure that I receive all iLab and Core emails? Why am I not receiving the iLab emails?

Who do I list as the Financial Administrator if asked on the registration form?

My P.I. is very busy and does not have time to log into iLab and approve every request that requires P.I. approval. Can the P.I. assign someone in the lab to be their iLab Manager and what will be his/her tasks?

My P.I. has assigned me to be the lab's iLab Manager. How do I make sure that I will receive the emails asking for financial approvals?

Does the P.I. or the iLab Manager have to accept the member's account request and assign index numbers <u>before</u> a user can request services in iLab? (Internal WSU users only)

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For external (non-WSU) users, do I have to provide a payment number when submitting a request online? This also applies to "external" WSU users (those WSU users paying with a non-WSU account and having to pay by check).

I made a mistake in the service request form but I have already submitted it to the Core. Can I change it?

How do I view or track services that I have submitted or that were submitted by members of my lab (if P.I. or iLab Manager)?

How do I contact the Core about a specific request?

Once the Core reviews the request and issues a quote, who has to approve the quote & how?

How does the P.I. or iLab Manager approve a service request that is quoted above the set Auto-Approval Threshold amount? That is, those requests Waiting for P.I. Approval.

Why does my screen not look like what is in the FAQs screenshots or iLab manuals?

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Can I change/update the WSU index number at any time before the charges are sent to Banner? Who can make these updates? (for WSU users paying with WSU index numbers only)

Who will receive invoices & how do we pay?

Where are the iLab manuals?

What is iLab?

It is the online system for submitting service requests, tracking jobs, and billing for all Cores at Wayne State University – a central location where investigators from various institutions can access services.

When requesting services online, what if I do not know which services to pick?

Users who have already consulted with the Core about their mass spec needs do not have to specify services in detail since all of the pertinent information have probably been discussed already (project goal, experimental techniques, buffer contents, protein concentration, gel images, number of slices to analyze, etc.). Only the red-starred items are required in the iLab form as long as you have already provided the Core the rest of the information.

For those who have not discussed with Core personnel at all can provide as much information as necessary. Feel free to upload any documents from within the iLab submission form. Some services (ex. trypsin digest, Sequest, Mascot, or Scaffold analysis) are standard and will be provided even if not specified on form. If you are unsure about what to pick, leave a comment in a blank box, just leave it blank, or contact the Core. If anything is not clear to us, we will contact you, so do not worry. Also see **How do I request services in iLab?**

Where can I get more information on sample submission and starting the iLab process?

http://proteomics.wayne.edu/submissions.php

https://waynestate.corefacilities.org/account/login

Be sure to read the rest of the FAQs also.

Who do I contact if I cannot remember my password, do not see my WSU index numbers (for WSU users paying with WSU index only), or have problems requesting a service in general?

Only iLab can send you email reminders of your username & password, but you can contact the Core and we will help you contact iLab. To contact them directly, email them at support@ilabsolutions.com – iLab staff will be in touch within 24 hrs. For any issues, contact the Core at 313-577-6545. For index number & service requests issues, see appropriate section in FAQs or call the Core.

What is the rule for creating iLab accounts for WSU users? This applies to WSU users only.

For now, you must follow these rules:

If you are with WSU and will be paying with a **WSU** index number, use your and your P.I.'s **WSU** email address when creating the iLab account and requesting service: ex. ab1234@wayne.edu

If you are with WSU but will be paying with an **external (non-WSU)** account number (ex. Karmanos, Henry Ford, VA, etc.), use your and your P.I.'s **external** institution email address when creating the iLab account and requesting service: ex. jane@karmanos.org

I have an alternate email address that I prefer to use. How do I make sure that I receive all iLab and Core emails? Why am I not receiving the iLab emails?

Be sure to forward all iLab and Core emails to the alternate email address. iLab emails may be filtering into your Junk Mail box – remember the sender may say "no-reply," not "iLab."

Ex. If you prefer to use mary@karmanos.org but your iLab account is under ab1234@wayne.edu, have your Wayne email forwarded to your Karmanos email account.

Who do I list as the Financial Administrator if asked on the registration form?

This is the person in charge of payments for the P.I., manages their accounts, and should be receiving iLab invoices in addition to the P.I.

My P.I. is very busy and does not have time to log into iLab and approve every request that requires P.I. approval. Can the P.I. assign someone in the lab to be their iLab Manager and what will be his/her tasks?

Some P.I.s assign their Research Assistant, Post-Doc, Lab Manager, or Financial Administrator to that role. Let the Core know if you would like to assign someone. This is optional. If the P.I. would prefer to oversee all iLab activities him/herself, that is fine.

Some of the tasks of the iLab manager:

*(*WSU index numbers apply to WSU users paying with WSU index numbers only)*

a. Accept lab members' requests for iLab accounts

b. Assign WSU index numbers to users*

c. Adjust Auto-Approval Threshold and Overage Buffer as needed

   (the amount up to which users can request services without P.I. approval and the amount up to which a request can cost above the approved cost without approval)

   When set high, P.I. or iLab Manager does not have to log into iLab & approve for every little job **BUT** the user should still check with the P.I./Fin. Admin. regarding their quote before approving)

d. Create a budget for the lab to spend at the Core and track spending

   (you will receive an email reminder when you approach the budget limit)

e. Manage the setting for who should be financial contacts for the lab

f. If the Fin. Admin. is the iLab Manager, you should be set up to receive invoices also (contact the Core if you are not receiving invoices)

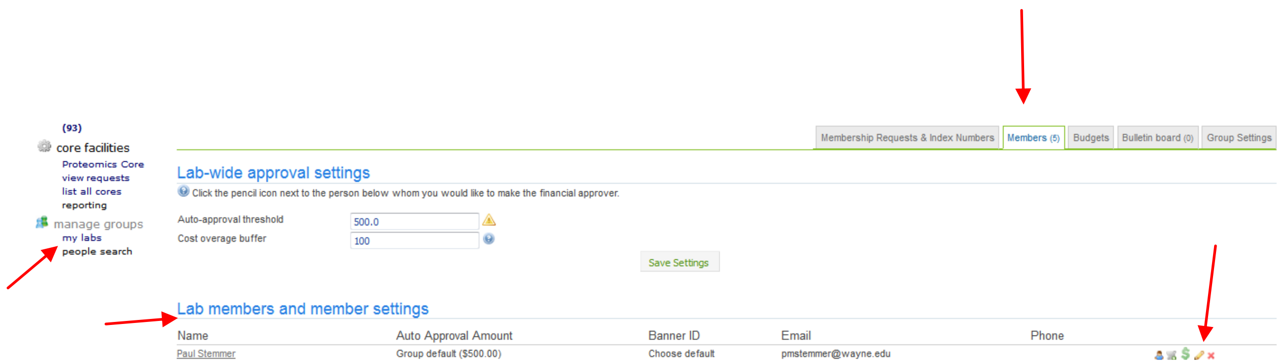
g. P.I./Fin. Admin. manual applies to iLab Manager also

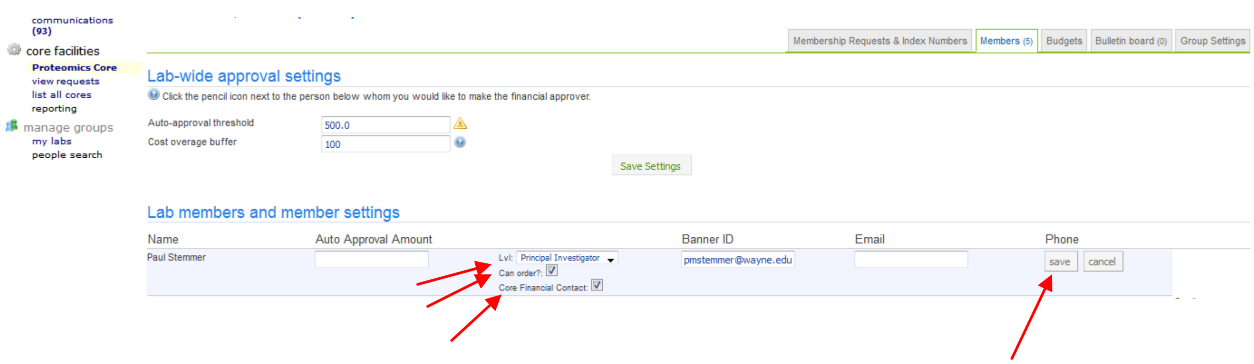
Contact the Core at av3631@wayne.edu to give us your iLab Manager's contact information.

My P.I. has assigned me to be the lab's iLab Manager. How do I make sure that I will receive the emails asking for financial approvals?

Your screen may not look exactly as in the screenshot since the website is constantly being improved.

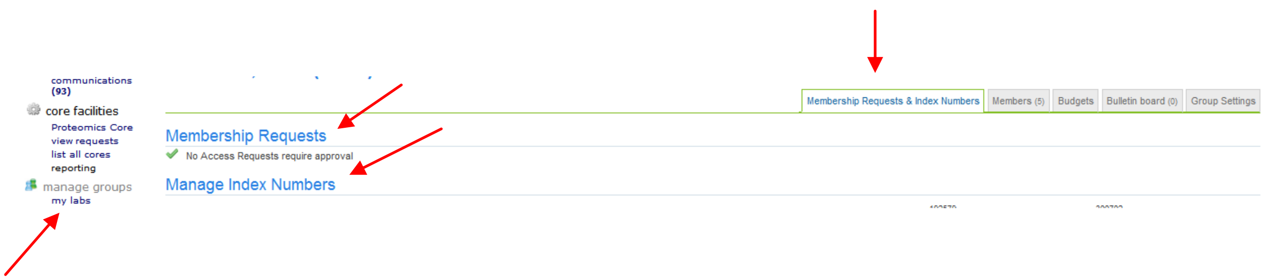
1. Under My Labs, choose the lab name.
2. Click on the Members tab across the top.
3. To the right of your name in the list, click on the pencil icon to edit.
4. Choose your level as Manager.
5. Put a check mark whether you can order/request services.
6. Put a check mark under Financial Contact.
7. Click Save.





Does the P.I. or iLab Manager have to accept the member's account request and assign index numbers <u>before</u> a user can request services in iLab? (Internal WSU users only)

Yes, to begin requesting services in iLab, your P.I. or iLab Manager must accept you first after you register and assign you index numbers (WSU users paying with WSU index numbers only) before you can make a request in iLab.



Screen tabs have changed to the ones above but the older screenshots below give you the general idea.

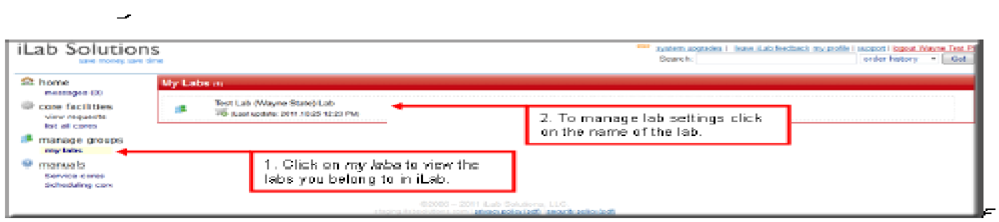


Figure 1. Click on the lab name to manage settings.

How Do I Accept Lab Membership Requests?

Typically a request for access to your lab will be delivered by email from ilabsolutions.com. The email contains a link that will take you directly to your lab management page where you can choose to accept or reject the access request. The email will contain the name of the person requesting access to your lab.

Once you have clicked on the link in the email and have logged in, you will land on your lab page. At any time, you can also log in, click on *my labs* on the left side and click on your lab name to reach your lab page. Once on your lab page, you can click on the blue *Access Requests* panel to expand this section. You will see a list of all individuals requesting access to your lab for ordering purposes.

Click on the *Accept* or *Reject* button on each request line (*Figure 2*).

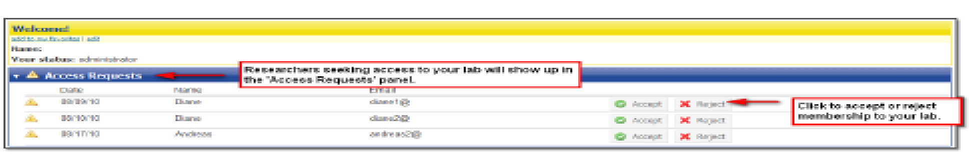


Figure 2. Click on *Access Requests* on your lab's page to approve or reject a lab access request.

Next you will need to provide the new lab member access to Index Numbers. Without assigning an Index Number to your lab member, they will not be able to schedule equipment use or order services from Wayne State cores.

How Do I Manage and Assign Index Numbers?

On your lab's page, click the *Manage Index Numbers* panel to expand this section (*Figure 3*). Click on the appropriate checkboxes to provide the researcher's access to Index Numbers. After assigning Index Numbers for each researcher on the list, click the *save* button at the bottom of this section.

If you do not see the Index Number that your researcher needs to use for their project, you can request usage of the Index Number in iLab by entering in the number below the *Request access to additional Index Numbers* section. The Wayne State Business Manager that manages that account will receive an email and can grant your lab access to it.

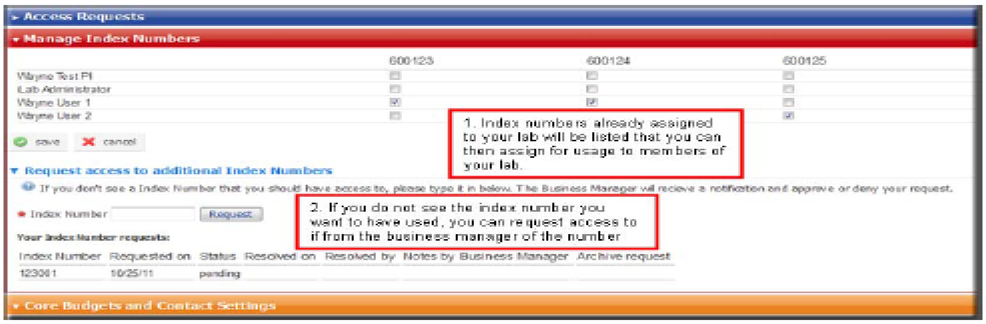


Figure 3. Assign Index Numbers for lab members to use when ordering services from Wayne State cores.

How do I request services in iLab?

The actual screens may differ a little from these screenshots.

1. Click on List all cores, then choose the core of interest.
2. Click on Request Services tab across the top.
3. Click on Click here to request services.
4. Then click on Initiate request to the right

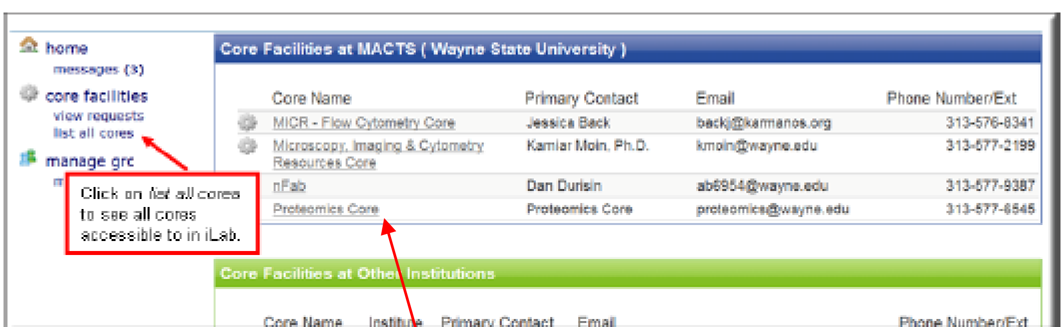


Figure 2. Click on *list all cores* to view a list of all cores live in the iLab System.

5. Start typing your name in the Project Request box below…when your name appears with the appropriate email address, click on it, and you will be directed to the request form.

   **For WSU users, choose the email address for the type of account number you will be paying with. Ex. ab1234@wayne.edu if you will be paying with a WSU index number vs jane@karmanos.org if you will be paying with a KCI account.

6. Fill out the form :

   Starred items are required.

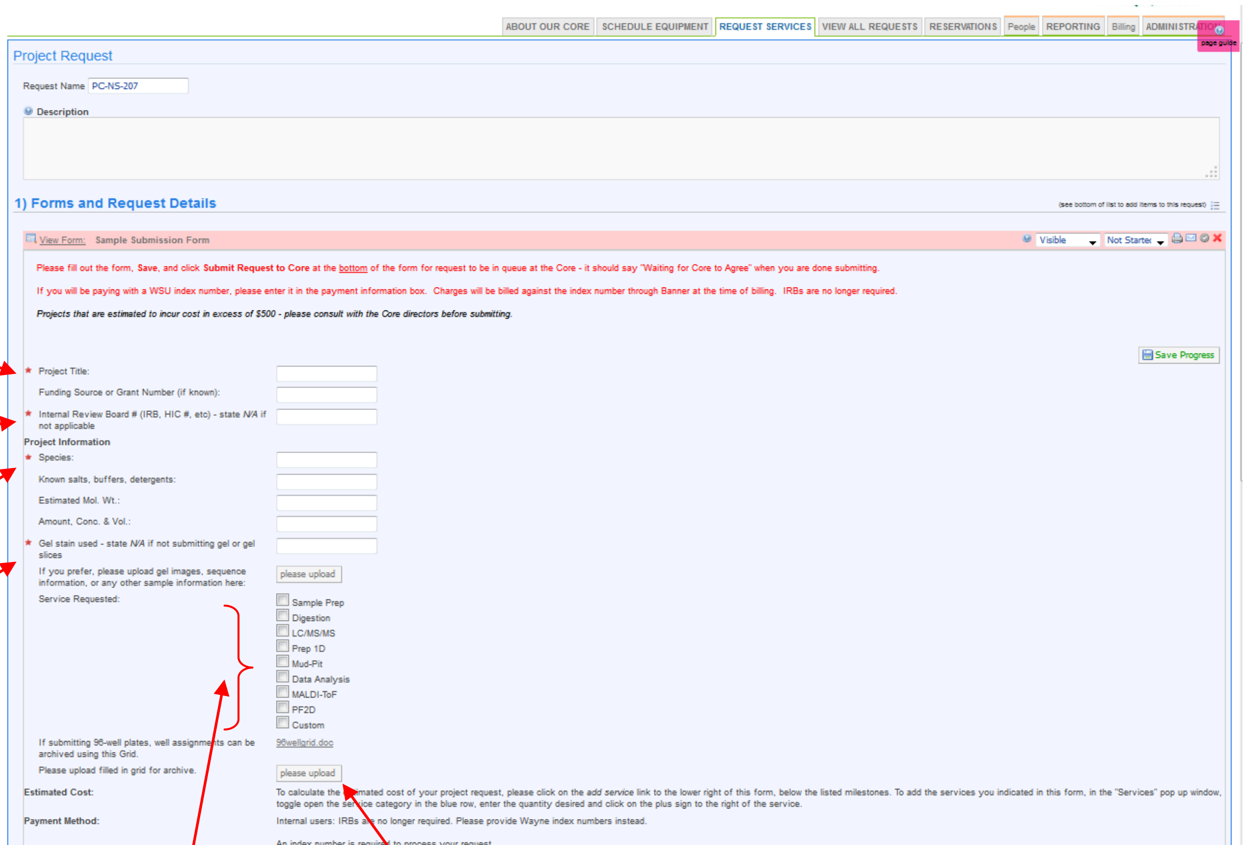
   Upload gel images or sequence information, if desired.

   If you have not consulted with the Core regarding your project, provide as much information as necessary but leave blank or leave a comment if unsure. We will contact you if anything is not clear….some services are standard and will be provided even if not checked off.

   Click Save towards the middle of the form.

   Lastly, click Submit to the Core at the bottom of the form.

   Only WSU users paying with WSU index numbers have to provide index numbers for now. WSU users paying with non-WSU accounts & external users paying by check – if it prevents you from requesting a service without payment information, type "pay by check" or type in PO number (if known) in the payment box.


ABOUT OUR CORE | SCHEDULE EQUIPMENT | REQUEST SERVICES | VIEW ALL REQUESTS | RESERVATIONS | People | REPORTING | Billing | ADMINISTRATION

page guide

Project Request

Request Name PC-NS-207

Description

1) Forms and Request Details

(see bottom of list to add items to this request)

View Form: Sample Submission Form — Visible — Not Started

Please fill out the form, Save, and click **Submit Request to Core** at the bottom of the form for request to be in queue at the Core - it should say "Waiting for Core to Agree" when you are done submitting.

If you will be paying with a WSU index number, please enter it in the payment information box. Charges will be billed against the index number through Banner at the time of billing. IRBs are no longer required.

Projects that are estimated to incur cost in excess of $500 - please consult with the Core directors before submitting.

Save Progress

* Project Title:

Funding Source or Grant Number (if known):

* Internal Review Board # (IRB, HIC #, etc) - state N/A if not applicable

Project Information

* Species:

Known salts, buffers, detergents:

Estimated Mol. Wt.:

Amount, Conc. & Vol.:

* Gel stain used - state N/A if not submitting gel or gel slices

If you prefer, please upload gel images, sequence information, or any other sample information here: please upload

Service Requested:

- Sample Prep
- Digestion
- LC/MS/MS
- Prep 1D
- Mud-Pit
- Data Analysis
- MALDI-ToF
- PF2D
- Custom

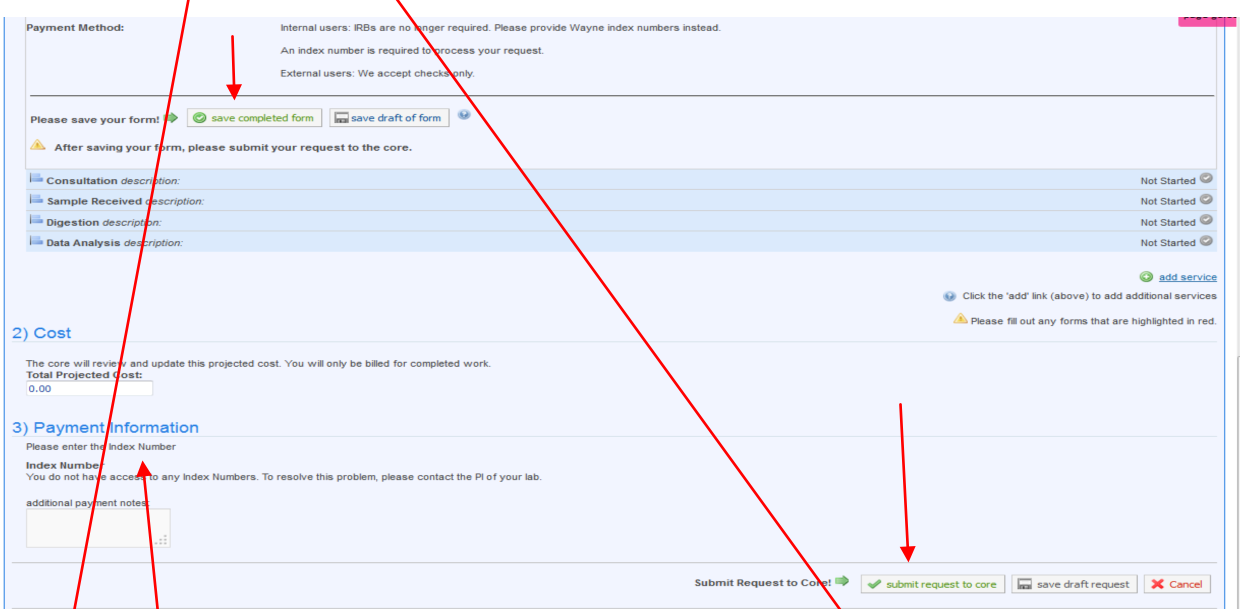
If submitting 96-well plates, well assignments can be archived using this Grid. 96wellgrid.doc

Please upload filled in grid for archive. please upload

Estimated Cost: To calculate the estimated cost of your project request, please click on the *add service* link to the lower right of this form, below the listed milestones. To add the services you indicated in this form, in the "Services" pop up window, toggle open the service category in the blue row, enter the quantity desired and click on the plus sign to the right of the service.

Payment Method: Internal users: IRBs are no longer required. Please provide Wayne index numbers instead.

An index number is required to process your request.


Payment Method: Internal users: IRBs are no longer required. Please provide Wayne index numbers instead.

An index number is required to process your request.

External users: We accept checks only.

Please save your form! save completed form | save draft of form

After saving your form, please submit your request to the core.

Consultation *description:*	Not Started
Sample Received *description:*	Not Started
Digestion *description:*	Not Started
Data Analysis *description:*	Not Started

add service

Click the 'add' link (above) to add additional services

Please fill out any forms that are highlighted in red.

2) Cost

The core will review and update this projected cost. You will only be billed for completed work.

Total Projected Cost:

0.00

3) Payment Information

Please enter the Index Number

Index Number

You do not have access to any Index Numbers. To resolve this problem, please contact the PI of your lab.

additional payment notes

Submit Request to Core! submit request to core | save draft request | Cancel

WSU users – choose index number if paying with WSU index number

WSU users paying with non-WSU account & will be sending a check and non-WSU users – can type "pay by check" if will not let you submit without some payment number

Can leave service types blank…

will do standard services unless consulted Core

Upload gel image or document, if desired

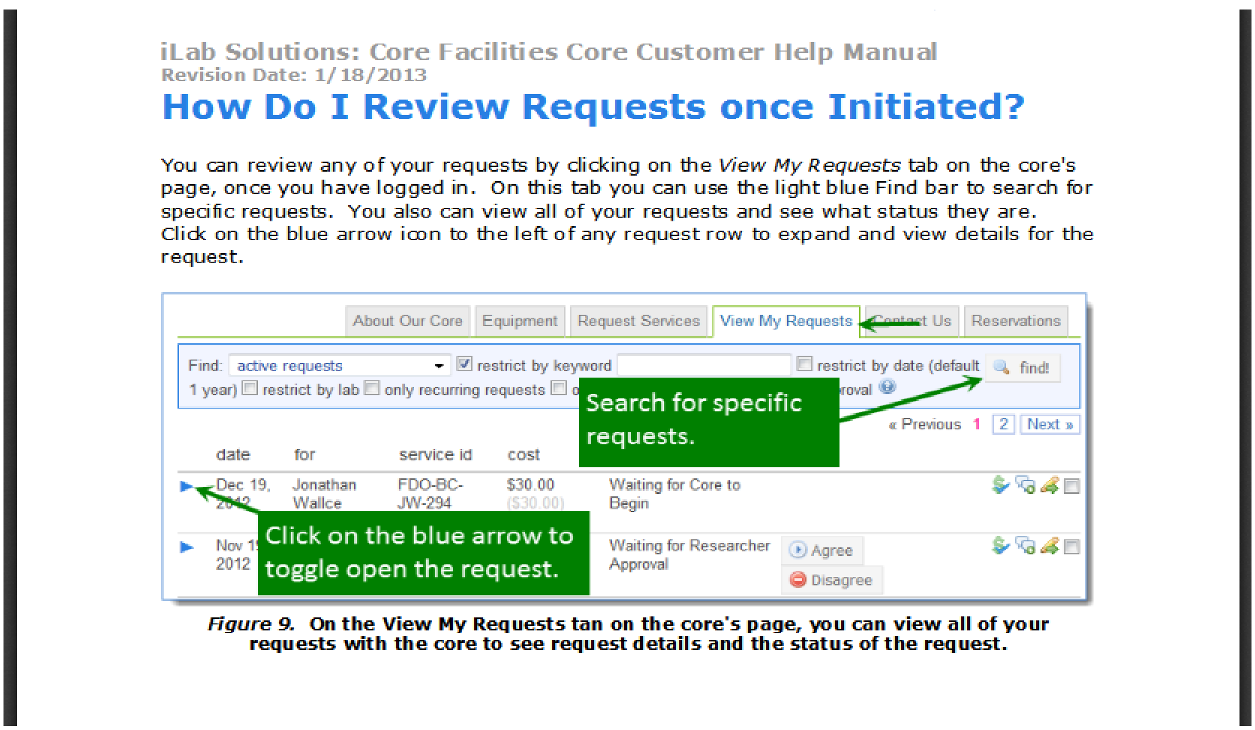
For external (non-WSU) users, do I have to provide a payment number when submitting a request online? This also applies to "external" WSU users (those WSU users paying with a non-WSU account and having to pay by check).

For now, external users do not have to provide a payment number. This may change in the future. If the system will not accept your request without any payment number, you can type "pay by check" or a PO number, if known.

I made a mistake in the service request form but I have already submitted it to the Core. Can I change it?

Yes, log in & just change the information in the request form for the specific request. Also, contact the Core to let us know if you want a different digestion enzyme used, etc. See **How do I view or track services that I have submitted or that were submitted by members of my lab (if P.I. or iLab Manager)?**

How do I view or track services that I have submitted or that were submitted by members of my lab (if P.I. or iLab Manager)?


iLab Solutions: Core Facilities Core Customer Help Manual
Revision Date: 1/18/2013

How Do I Review Requests once Initiated?

You can review any of your requests by clicking on the *View My Requests* tab on the core's page, once you have logged in. On this tab you can use the light blue Find bar to search for specific requests. You also can view all of your requests and see what status they are. Click on the blue arrow icon to the left of any request row to expand and view details for the request.

Figure 9. **On the View My Requests tan on the core's page, you can view all of your requests with the core to see request details and the status of the request.**

How do I contact the Core about a specific request?

You can call the Core at 313-577-6545, email Core personnel, or send a message from within iLab.

iLab Solutions: Core Facilities Core Customer Help Manual
Revision Date: 1/18/2013

How can I Communicate about Request in iLab?

To communicate about a request, click on the "comment" icon ( ) at the top of the request row and enter the message you would like to send. In the message pop-up, choose who you want to send the email to and enter in your message. The email sent will include a link to the request.

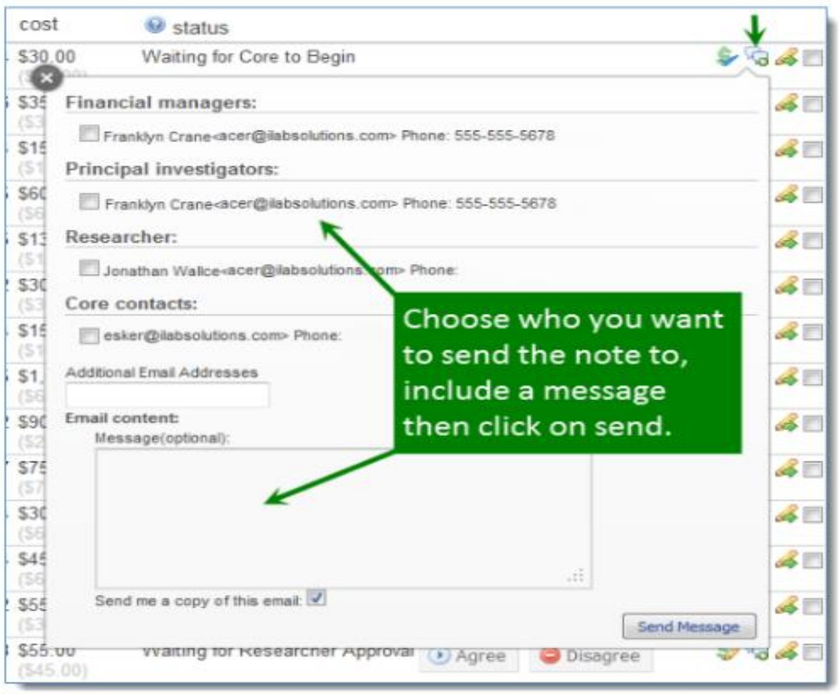


Figure 11. **Click on the communication bubbles to send an email about the request. If you us iLab for your communications, they will be tracked within the request.**

Once the Core reviews the request and issues a quote, who has to approve the quote & how?

The person whose name the service request is under will receive an iLab email to approve the quote. Consult with your P.I. or Financial Administrator regarding fund availability before agreeing to the cost. Follow email instructions.

How do I Approve the Quote?

Once the core has reviewed and approved your request, the core may provide you with a quote or cost estimate by email. The email will contain a summary of the request with a direct link to your request where you can review the request including milestones and any anticipated charges. When you are ready to approve the quote you can click on *Agree* on the right of the quote. At this time you may be able to update your payment information, if necessary, and even set a different amount you agree with.

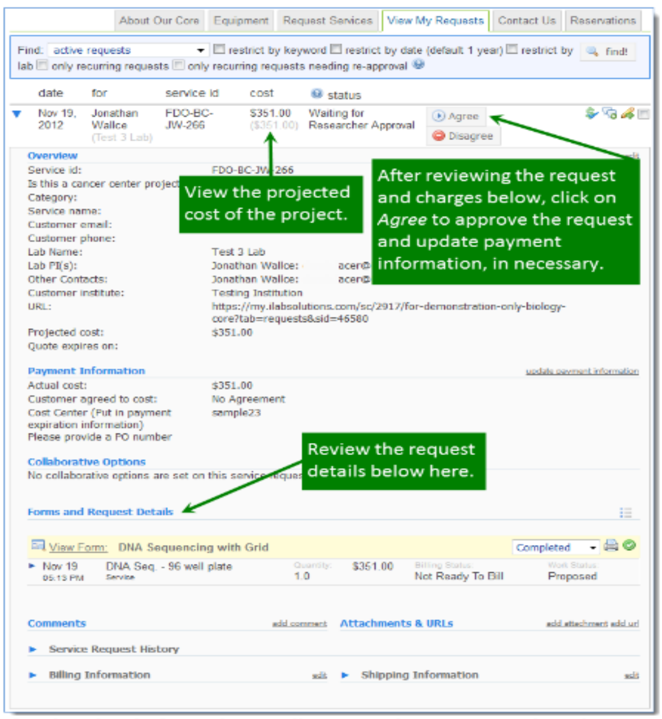


Figure 8. **After logging in from the email you receive, you can view the request details, projected cost (quote) and agree to the project.**

Once you click on *Agree*, the core will be notified of your intent to continue with the work, and will notify you when work begins on your project and at other important milestones, including project completion.

How does the P.I. or iLab Manager approve a service request that is quoted above the set auto-approval threshold amount? That is, those requests Waiting for P.I. Approval.

Some information may not apply to you depending on whether you are a WSU user or an external user.

You can see all requests made by members of your lab under the *All Requests* tab and update payment information at any time (*Figure 7*).

How Do I Approve a Service Request?

Once satisfied with the details of a service request, follow the steps outlined in the next image to complete the PI Approval process:

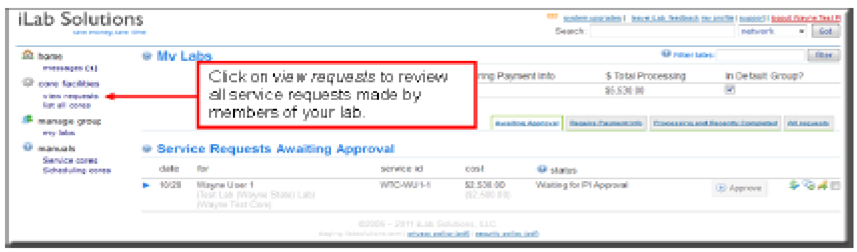


Figure 8. Review and approve service requests made by members of your lab to core facilities.

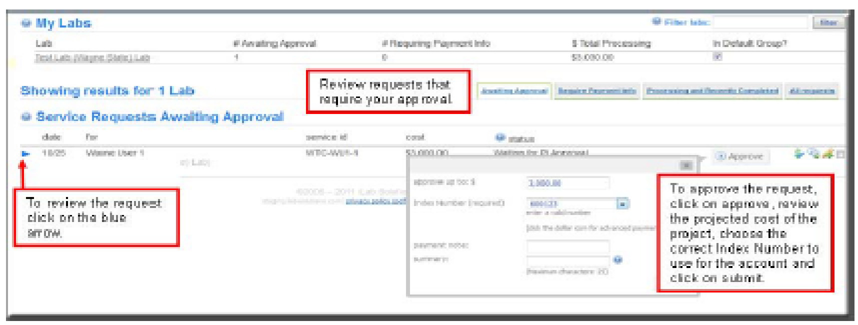


Figure 9. Approve service requests quoted above the set auto-approval threshold amount and set the index number for the core to use.

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*.

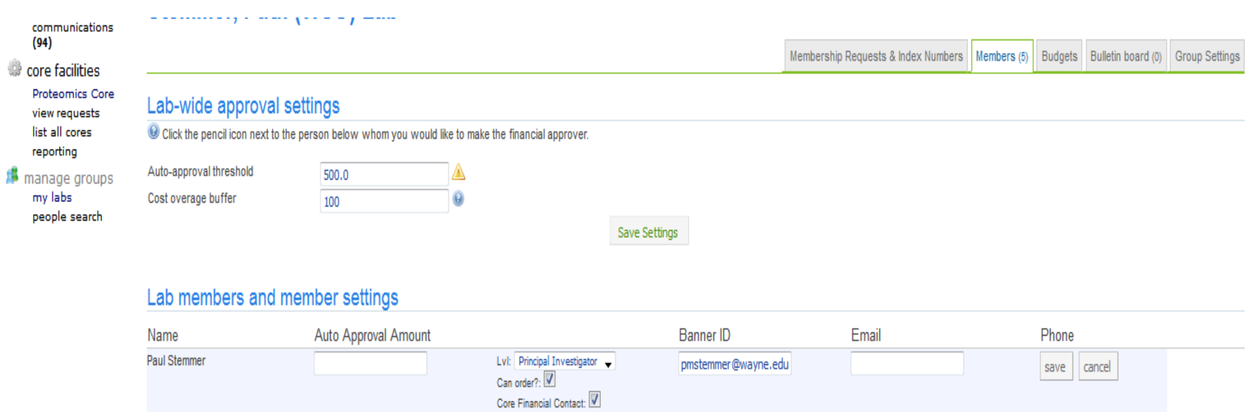
Figure 11. Approve requests with projected costs above your approval amount.

Why does my screen not look like what is in the FAQs screenshots or iLab manuals?

Your actual screen may vary a little as the website is being constantly updated. The idea should be the same, so use the directions as general guidelines.

Can I track spending at the Core or set Auto-Approval Threshold amounts?

Yes, the P.I., iLab Manager, or Financial Administrator can click on My Labs to the left of the page, choose the lab name, then change the Auto-Approval Threshold or Cost Overage Buffer under the Members tab. Set it higher than the default amount, if possible, so that you do not receive too many iLab emails asking for your approval for every small request (unless you prefer it that way). Click on the question marks to see definition of terms in iLab screens. Track spending at the core by creating a budget under the Budgets tab - you will receive an email reminder when you approach the budget limit.



Can I Set an Auto-Approval Threshold for Service Cost Estimates (Quotes)?

As a PI or lab manager, you can determine the dollar amount up to which you would like your researchers to be able to auto-approve service requests to cores. On your lab page, click to toggle open the *Core Budgets and Contact Settings* section (*Figure 4*). Simply set the desired dollar value in the *Auto Pre-Approval Amount* field, and

then click the *Save Settings* button. The auto-approval threshold is defaulted to up to $1000.

If you would like to designate someone to approve lab access requests and service requests, please let us know by clicking on *leave iLab Feedback* in the upper right of the iLab page or send an email to support@ilabsolutions.com.

Figure 4. Manage projected dollar amounts that require approvals and lab contacts for approvals.

Can I Create Core Budgets and Monitor Lab 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 limit. While in the *Core Budgets and Contact Settings* section, click the *Add budget* button and complete the form to add a budget for a core (*Figure 5*).

Figure 5. You can manage budgets for cores.

If I have requested services before and have access to an index number, do I have to assign a new index number the next time I request services? (for WSU users paying with WSU index numbers only)

You will still have access to the index number(s) that your P.I. or iLab Manager has already assigned to you. If you need to use a new index number, have them assign you the new number so that you will have access to it. Otherwise, the index number that you have previously used will show in the request and charges will be made to it.

Can I change/update the WSU index number at any time before the charges are sent to Banner? Who can make these updates? (for WSU users paying with WSU index numbers only)

The P.I., iLab Manager, Financial Administrator, and the person who requested the service (as long as you have been given access to the particular index number) can update the index number by clicking on the $ sign in the service request line.

Can I Update Index Numbers Used for Service Requests?

Service requests can be reviewed by clicking open the any of the available tabs after clicking on *view requests*. 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 the images below to update and assign funding numbers for specific charges and then click on the *save* button to update the payment details.

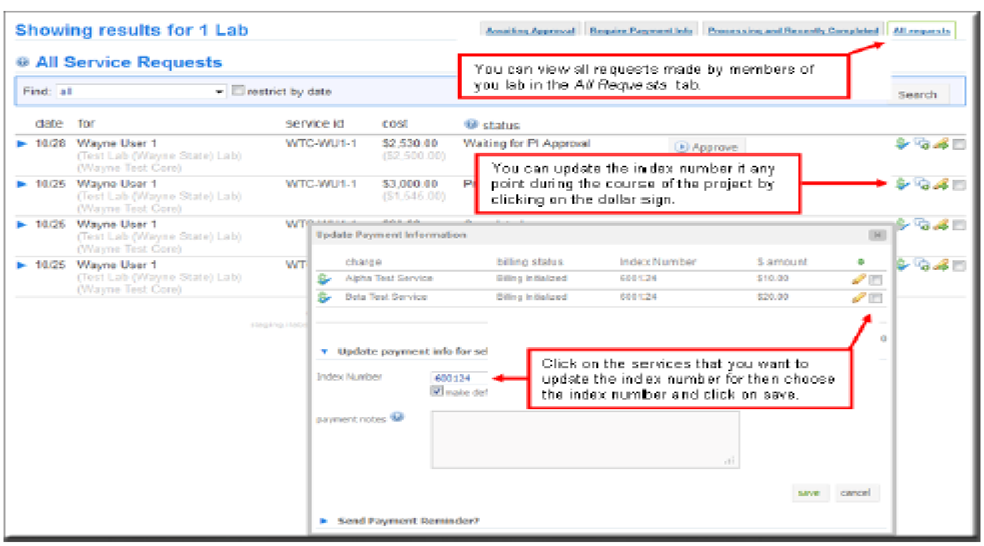


Figure 10. You can update the index number at any time for services being provided by the cores.

Who will receive invoices & how do we pay?

Unless told otherwise, the Core will send invoices to the P.I. and the Financial Administrator. WSU users will pay with a WSU index number and will be billed automatically through Banner once the request is completed, or pay by check if paying with a non-WSU account (ex. VA, Henry Ford, etc). All non-Wayne State users must pay by check. See mailing address on invoice.

Where are the iLab manuals?

WSU user manual:

https://content.ilabsolutions.com/wp-content/uploads/2011/12/WayneUserInstructions.pdf

WSU P.I./Fin. Admin./iLab Manager manual:

https://content.ilabsolutions.com/wp-content/uploads/2011/12/iLab_Customer_Help_PI_Financial_Ad_f.pdf

External (non-WSU) user manual:

http://www.ilabsolutions.com/wp-content/uploads/2011/12/Customer-Manual-for-Core-Facilities-v1020111.pdf

External (non-WSU) P.I./Fin. Admin./iLab Manager manual:

http://www.ilabsolutions.com/wp-content/uploads/2011/12/iLab_Customer_Help_PI_Financial_Admin_Trainv102011.pdf