What is iLab?

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

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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)

How do I request services in iLab?

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?

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

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)

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 <u>mary@karmanos.org</u> but your iLab account is under <u>ab1234@wayne.edu</u>, 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 <u>av3631@wayne.edu</u> 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 <u>My Labs</u>, choose the <u>lab name</u>.
- 2. Click on the <u>Members</u> 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.

core facilities										_
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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.

communications		Ļ			
(93)		Membership Requests & Index Numbers	Members (5) Budge	ts Bulletin board (0)	Group Settings
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list all cores	V No Access Requests require approval				
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/					

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

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home messages (0)	My Labs or	Wayna Stand I ah		
core facilities view requests list all cores manage groups my table	# 10 Last	(Hinghine County Loo) (gradine 2011 / 10:05 12:20 PM)	 To manage lab settings click on the name of the lab.]
 manuals Service cores Scheduling core 		 Click on my labo to view the labs you belong to in iLab. 		

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).

Welce	each de la companya d						
Haren:							
•	Access Requests	-	Researchers seeking access to your lab will show up in the "Access Requests" panel.				
	Date	Marine	EMBI				
-	09/09/10	Diane	gianal@	 Accept 	× Reject	-	Click to accept or reject
	00/10/10	Diane	dano2@	Accept	× reject		membership to your lab.
4	09/17/10	Andreas	andre ac2@	 Accept 	🗙 Reject		

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.

manage muck numbers			
	600123	600124	600125
Wayne Test PI	8	8	10
Lab Administrator		E	10
Wayme User 1	121 121	12	E
Wayme User 2 Di save 🗶 cancel	1. Ind to you then i your	ex numbers already assigned ur lab will be listed that you ca assign for usage to members (ab.	n af
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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 <u>List all cores</u>, then choose the core of interest.
- 2. Click on <u>Request Services</u> 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. <u>ab1234@wayne.edu</u> if you will be paying with a WSU index number vs <u>jane@karmanos.org</u> if you will be paying with a KCI account.

home communications (93)	Proteomics Core	
core facilities Proteomics Core view requests list all cores constitute	ABOUT OUR CORE SCHEDULE EQUIPMENT REQUEST SERVICES VIEW ALL REQUESTS RESERVATIONS	People REPORTING Billing ADMINISTRATION
Manage groups my labs people search	Project Request person (type the name of the person for whom you'd like to create a request)	ssearcher] 🔚 save draft request] 🗶 Cancel

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 <u>Submit to the Core</u> 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.



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)?

		Cevier	N Reques	ts once Ir	nitiated?
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page, once	you have	logged in.	On this tab you c	an use the light blue	e Find bar to search
specific req	uests. You	u also can v w icon to #	view all of your required	uests and see wha	t status they are.
request.			ie ieit of ally requ		
	Abo	out Our Core E	Equipment Request Ser	ices View My Requests	Contoct Us Reservation
Find: active	Abo e requests	out Our Core E	Equipment Request Ser	ices View My Requests	Contact Us Reservation
Find: active 1 year) 🗐 re	Abo e requests estrict by lab	out Our Core E	Equipment Request Ser	ices View My Requests	Contact Us Reservation t by date (default , find! al @
Find: active 1 year) Tre	Abo e requests estrict by lab	out Our Core E v v re only recurring r service id	Equipment Request Ser estrict by keyword requests 0 Search request	for specific	Contact Us Reservation t by date (default , find: al @ « Previous 1 2 Nex
Find: active 1 year) Tre date Dec 19,	Abo e requests estrict by lab	eut Our Core E	equipment Request Ser estrict by keyword requests a Search request cost Waiting (520.00) Waiting	ices View My Requests restric for specific ts. ior Core to	Contact Us Reservation t by date (default , find: al « Previous 1 2 Nex

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.

ow can I Communicate a	about Request in iLab?	
communicate about a request, click o uest row and enter the message you o you want to send the email to and o to the request.	on the "comment" icon (😚) at the t would like to send. In the message enter in your message. The email se	op of the pop-up, ch nt will incl
cost 🥹 status		1
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\$35 Financial managers:		40
(53) S15 Principal investigators:	com> Phone: 555-555-5678	4
\$60 (56) Franklyn Crane <acer@ilabsolutions.< td=""><td>com> Phone: 555-555-5678</td><td>4</td></acer@ilabsolutions.<>	com> Phone: 555-555-5678	4
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1 \$55 million to researcher ar	DDroval (15) A second (25) Discourse (25)	2

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.

Once the core quote or cost direct link to y anticipated of the right of th necessary, an	e has reviewed and approved your request, the core may provide you with a : estimate by email. The email will contain a summary of the request with a your request where you can review the request including milestones and any harges. When you are ready to approve the quote you can click on <i>Agree</i> on he quote. At this time you may be able to update your payment information, if nd even set a different amount you agree with.
	About Our Core Equipment Reguest Services View My Reguests Contact Us Reservations
	Find: active requests
	date for service ld cost 🚱 status
	Viov 19, Jonethan FDO-BC- 2012 Wallice JW-266 (\$351.00 Waiting for (3351.00) Researcher Approval Obsource Sasterier Approval
	Chetgory: Cost of the project. and charges below, click on Agree to approve the request and update payment and update payment information, in necessary. Customer institute: Test 3 Lab acend information, in necessary. Customer institute: Test 3 Lab acend information, in necessary. Customer institute: Test 3 Lab acend information, in necessary. Customer institute: Test 3 Lab acend information, in necessary. Customer institute: Test 3 Lab acend information, in necessary. Customer institute: Test 3 Lab acend information, in necessary. Customer institute: Stationary (my labsolutions.com/sc/2917/for-demonstration-only-biology-core7tab=request&sid=46500 Projected cost: \$351.00
	Actual cost: \$351.00 uedul several (riomideo) Customer agreed to cost: No Agreement Cost Center (Put in pyment sample23 expiration information) Please provide a PO number Review the request Collaborative Options No collaborative options Actual Cost
	Forms and Request Details
	🔤 View Form: DNA Sequencing with Grid Completed - 🚔 👁
	Nov 19 DNA Seq 96 well plate Ouerdit: \$351.00 Bitting Status Work Balas os.15 Ptu Service 1.0 Not Roady To Bill Proposed
	Comments add sammet Attachments & URLs add attachment add at
	Service Request History

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:

Lab Solution	15				Search:	natural and a second	* 60
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messages (k) i cone facilities vies requests lat all cores manage group my lates		Click on view requi all service requests members of your k	e <i>sts</i> to review s made by ab.	ning Payne	ent into \$ Total Pr \$5.530 M LANGTON	trocusion and faceure, Langence	introcente
manuals	Servi	ce Requests Awaiting A	pproval				
Sienvice cores Scheduling cores	date	for	service id	cost.	Status		
	 10/28 	Wayne User 1 (Test Lob (Woyne Stote) Lab) (Wayne Test Care)	WIC-WUH-H	\$2,530,00 (\$2,500,00)	Waiting for PI Approval	E Approve	\$@ 4

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

My Labs					@ Fiber Mac	- tite
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click on the blue				job the deflar care for achieved pays	the projected cost o	fthe
ar on.			payment note:		correct index Numb	erto
			(Anterior A.	Plavimum characters 20	use for the account	and

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*.

	Sho	owi	ng results	for 1 Lab		Awaiting Approval	Require Payment Info	Processing and	Recently Completed	All requests
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	► 01	1/26	Mark (Alan) (/BB Vivanum)	(SB Lab)	Vivarium-2011-Aderem-MG-91 Cest requer 40	\$5.00.00	Waiting for PLAnn	lavorat (34)	Approve	* 84
2. val	The due. Y	quo You	te price for a may wish to	request is increase t	the default approval his approval amount to be added to the project	PO Number (required	12345 enter a valid number		1. After revi details of a	ewing the request,
alle wit 3. 1	hout	ide	quiring re-ap	provel or d	for the request.	Summary:	[click the delar icon fo payment settings] test requet #3	r advanced	click the 'Ap button. This open a diale Confirm the	oprove will ogue box. approval

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 <u>My Labs</u> 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.

communications										
(94)					Membership Requests & Index Numbers	Members (5)	Budgets	Bulletin board (0)	Group Settings	
Proteomics Core view requests list all cores reporting	Lab-wide approval settings									
	Olick the pencil icon next to the person below whom you would like to make the financial approver.									
🇯 manage groups	Auto-approval threshold	500.0								
my labs people search	Cost overage buffer	100								
	Save Settings									
	Lab members and men	nber settings								
	Name	Auto Approval Amount		Banner ID	Email		Phone			
	Paul Stemmer		Lvi: Principal Investigator Can order?: Core Financial Contact:	pmstemmer@wayne.edu			save	cancel		

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

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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 <u>support@ilabsolutions.com</u>.

Core Financial Contacts		1. You can s your approva quotes.				
RI Wayne Test Pl RI Lab Administrator	 You can choose to be the contact for lab access approvals and cost estimate approvals or you can designate someone else in your lab to be the contact. 					Silve Settings
My Lab's Core Budgets	Total \$ Allowed	Start Date	Total Spent Since Start Date	Total Remaining		
Nayne Test Core	20000.0	10/25/11	60	19940.0	0 X	
						A A A A A A A A A A A A A A A A A A A

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*).

Auto Pre-Approval Amount						
0 1000.0						
Core Financial Contact						
III Wayne Test Pl III iLab Administrator	Manage how mu each core and m					
1						Save Settings
-		Start Date	Total Spent Since Start Date	Total Remaining		
My Lab's Core Budgets	Total \$ Allowed	STREE DATE	total openic office orders pare			
My Lab's Core Budgets	Total \$ Allowed 20000.0	10.25/11	60	19940.0	2×	

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. <u>WSU users</u> 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 <u>non-Wayne State users</u> 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/wpcontent/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/wpcontent/uploads/2011/12/iLab_Customer_Help_PI_Financial_Admin_Trainv102011.pdf