

UVA MolMart PI/Financial Delegate iLab Manual

Table of Contents:

[Table of Contents:](#)

[Overview](#)

[Logging into iLab:](#)

[Navigating iLab:](#)

[Working with Core Facilities:](#)

[Ordering Products from MolMart online:](#)

[Invoices:](#)

[Managing PTAOs in a Lab](#)

[How does a PI or Financial Delegate Assign PTAOs?](#)

[FAQ's](#)

Overview

iLab serves as the UVA Core Facility's service/product/instrument request and billing system. iLab provides UVA PIs the abilities to: view core service, product and instrumentation availability, build quotes and/or submit service/product/instrument requests and reservations, access project statuses, maintain PTAOs and lab member roles, view pre-invoices with the option to update PTAOs before they are billed, and access invoices once billing is complete.

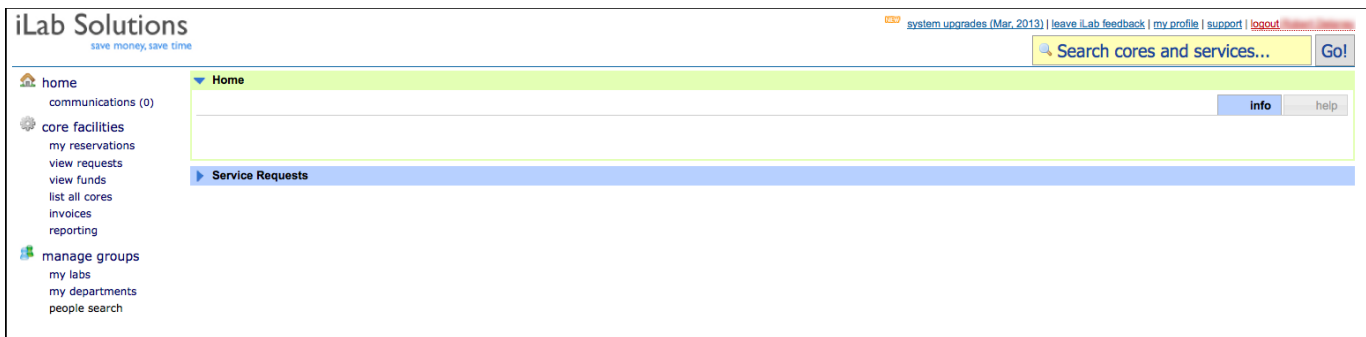
PIs, their financial delegates and/or their department administrators are responsible for maintaining the PIs' lab and lab employee membership roles, and for ensuring lab members are assigned access to PTAOs, **which is necessary for lab members to be able to submit any and all requests**. iLab uses there are three primary user roles to segment levels of authority and access within the system, which are discussed below under FAQ #2.

Additionally, iLab's integration with UVA ensures only valid payment information is accessible when orders are made and billing is processed. And the Office of Research Core Administration (ORCA) administers the iLab website, processes monthly billing, and provides iLab support along with iLab's support team.

This document can be used as an introductory guide to using MolMart in addition to our other cores in iLab. It will review logging into iLab, Navigating iLab, PTAO numbers and making any appropriate changes to labs under their respective PI or financial delegate.

Logging into iLab:

1. Type the following URL into your browser: <https://uva.corefacilities.org/>
 - a. Bookmark this URL.
2. Once on the iLab login page, login with your eservices email and password (the same used to login to Net Badge).
 - a. If you receive an LDAP error please call UVA Access Management at 4-0817 to re-enable your eservices account.
3. If you've not previously logged into iLab you may create your account by registering here via the following link: <https://uva.corefacilities.org/account/signup/369>
4. iLab support will approve your account and send your login credentials.
5. Once logged in you will be on the iLab homepage dashboard.
 - a. From the dashboard you may see notifications about approving requests or accepting new users to a lab you manage. Please address these requests in a timely manner.



Navigating iLab:

The left hand navigation panel will be used for all iLab functionality.

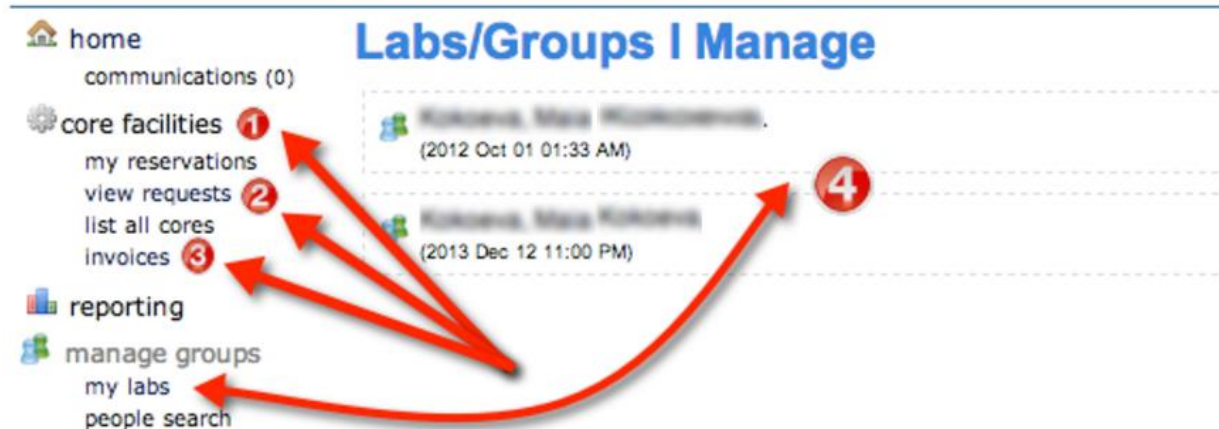


Image 1.1: Core Facilities:

- Click 'Core Facilities' to see any core at UVA working with iLab.
- Click the name of a core to enter their site.

Image 1.2: View Requests:

- Click 'View Requests' to view any request submitted by any member of your core
- You will also be able to update PTAOs from 'view requests' as well.

Image 1.3: Invoices:

- Click 'Invoices' to see a list of invoices created by a core for your labs review.
- You may view an invoice from your invoice list and make changes to your invoice. (See **Invoices** section for details on editing an invoice)

Image 1.4: My Labs:

- By clicking 'My Labs' you'll see a list of all labs in which you manage.
- To make changes to members, funding sources, or pre-approval amounts within a lab click the name of the lab.

Working with Core Service Facilities:

1. To work with any of the core facilities you MUST have at least one PTAO assigned to your account.
 - a. If you do not have funds, you will not be allowed to submit a request or save a reservation.
 - b. Please contact your department administrator or PI if you are a lab member and do not have access to a PTAO. You can also refer to the first FAQ answer at the end of this document for more details.
 - c. If you are still unsure how to proceed, contact the ORCA Business Manager, currently Alicia Felt via e-mail at af7sb@virginia.edu
2. Click the 'Core Facilities' link on the left panel. From here click the name of a core you would like to work with.
3. Once you are viewing a particular core you now have the option to 'Schedule Equipment' or 'Request Services'.

Select the desired tab to proceed.

4. Scheduling equipment: locate a calendar and click 'View schedule', next, click and drag on the calendar to create a reservation.
 - a. **If you are part of multiple labs** you will be asked to select the lab in which the reservation should be billed to. By selecting a lab you will see the proper payment information appear.

The screenshot shows a web interface for scheduling equipment. A modal window is open with the title "Please select which lab the request is for:". Below the title is a dropdown menu with two options: "Kokoeva, Maia (RI-MUHC) Lab" (selected with a checkmark) and "Kokoeva, Maia (McGill)". To the right of the dropdown is a "Next" button. A callout box with an orange border points to the dropdown menu, containing the text: "Since this person is part of multiple labs, iLab will ask her to choose which lab the reservation should be matched and billed to." In the background, a calendar is visible with a date selected.

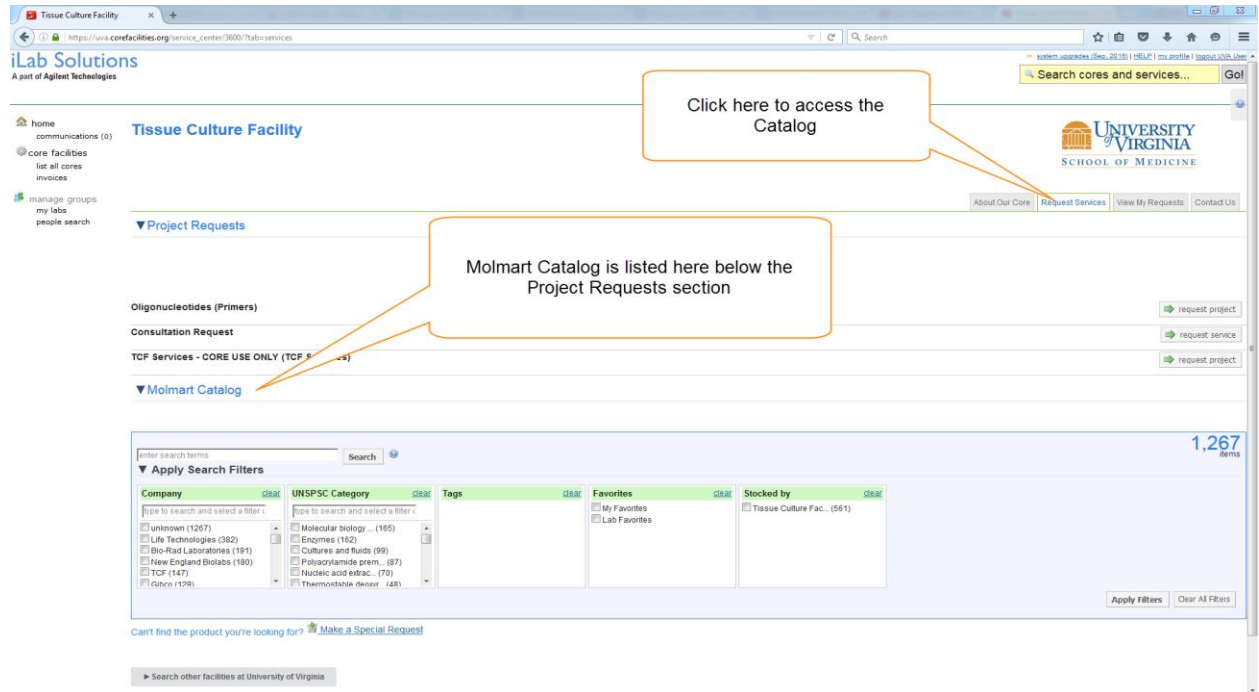
- b. Confirm and complete the details of your reservation and click 'Save Reservation'
5. Requesting Services: Click 'request service' for any service you would like to begin with a core.
 - a. **Again, if you are a member of multiple labs you will be asked to select the lab this project should be referenced against.**

The screenshot shows a web interface for requesting services. At the top, there are navigation tabs: "About Our Core", "Schedule Equipment", "Request Training and Assistance" (active), and "View My R". Below the tabs is a section titled "Consultation Request". It contains a form with the label "Please select which lab the request is for:". Below the label is a dropdown menu with two options: "--Select lab--" (selected with a checkmark) and "Kokoeva, Maia (McGill)". To the right of the dropdown is a "submit request to core" button. A callout box with an orange border points to the dropdown menu, containing the text: "If you are a member of multiple labs you will be asked to select the lab the project should be filed under. Doing so will also present you with correct Cost Centers for that lab."

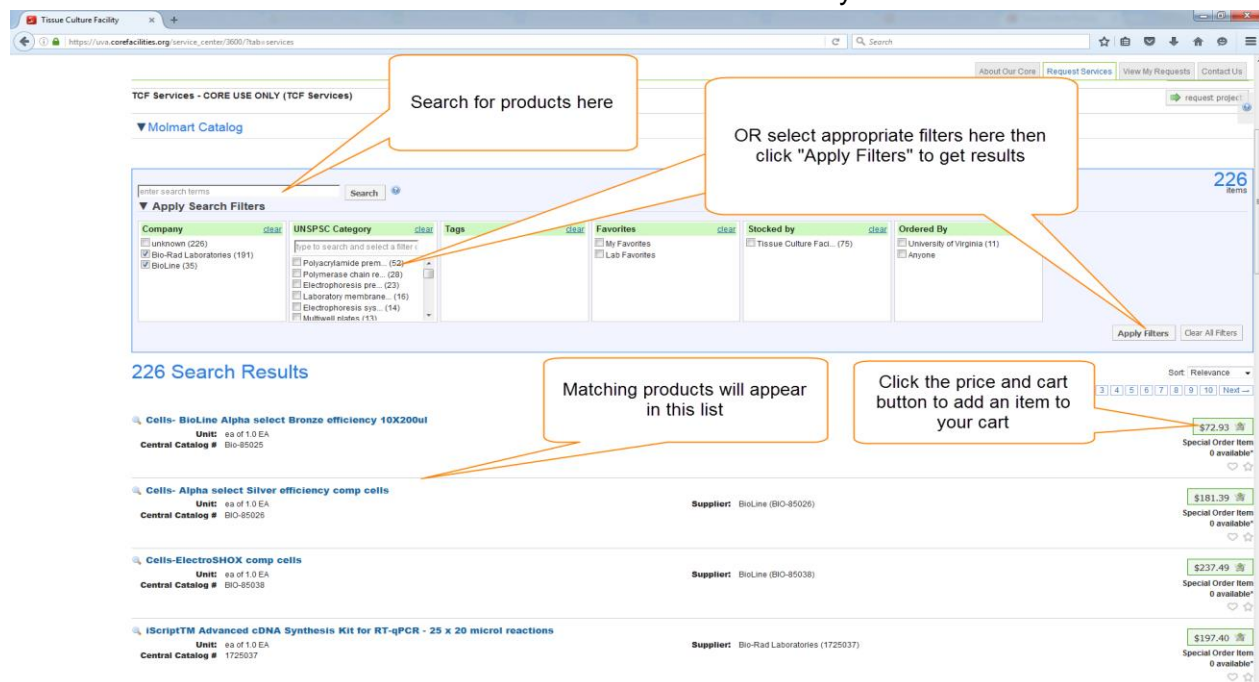
- b. Upon requesting service you will be asked to complete a form regarding your project.
 - c. After completing and providing your PTAO you may click 'Submit request to core'
 - d. The core will be notified and contact you regarding your project.

Ordering Products from MolMart online:

1. Access the MolMart & Tissue Culture Facility iLab page:
https://uva.corefacilities.org/service_center/show_external/3600
2. Navigate to the **"Request Services & Products"** Tab
3. The MolMart Catalog will load at the bottom of the page



4. To add products to your "cart", either search the name of the product or select an appropriate filter to locate it
5. Then click the Price and Cart button associated with it to add to your cart



- You can save products as personal favorites or lab favorites for future quicker searching
- To submit, view or edit your cart find the floating cart options box at the top right of your screen

Click "preview cart" to submit, view or edit your cart

You can save items for easy access by making a personal favorite (heart icon) or lab favorite (star icon)

Product Name	Unit	Supplier	Price
Cells- BioLine Alpha select Bronze efficiency 10X200ul	ea of 1.0 EA	BioLine (Bio-85025)	\$72.93
Cells- Alpha select Silver efficiency comp cells	ea of 1.0 EA	BioLine (Bio-85026)	\$181.39
Cells-ElectroSHOX comp cells	ea of 1.0 EA	BioLine (Bio-85038)	\$237.49
iScriptTM Advanced cDNA Synthesis Kit for RT-qPCR - 25 x 20 microl reactions	ea of 1.0 EA	Bio-Rad Laboratories (1725037)	\$197.40
iTaq Universal SYBR green SMX 200x			\$133.65

- Update quantity of products being requested if necessary and click "proceed to checkout" to finalize your cart and add your funding information

Adjust the quantity of products to request here

Click "proceed to checkout" to add funding information and place order

You can alternatively print your shopping list and bring it into the facility for purchase

Catalog #s	Product name	Qty	Unit	Unit price	total price
Bio-85025	Cells- BioLine Alpha select Bronze efficiency 10X200ul	1	ea	\$72.93	\$72.93

Anticipated total price: \$72.93

- You will have one last chance to review your order before submitting. **Note: Once submitted, your**

order cannot be changed. Please contact MolMart staff if you have any questions or concerns about a submitted order

10. In the payment information section you can select a PTAO available to pay for the order

The screenshot shows the 'Products' section of the Tissue Culture Facility website. A table lists a product: 'Bio-85025 Cells- BioLine Alpha select Bronze efficiency 10X200ul' with a price of \$72.93 and a requested quantity of 1. A callout points to the 'Requested' column with the text: 'One more chance to adjust requested quantity'. Below the table, the 'Anticipated Total' is \$72.93. A callout points to this total with the text: 'Total price listed here'. The 'Order type' is set to 'For pick-up'. The 'Payment Information' section shows a dropdown for 'PTAO' with a note: 'You do not have access to any PTAOs. To resolve this problem, please contact...'. A callout points to this dropdown with the text: 'You will have your available funds listed in a drop down menu for selection'. At the bottom right, there are buttons for 'submit cart to core', 'save cart for later', and 'Cancel'. A callout points to the 'submit cart to core' button with the text: 'Click "submit cart to core" to finish the ordering workflow'.

Accessing Invoices:

1. Click 'Invoices' to see a list of all invoices created by any core for your lab(s).
2. Use the filters on the left to reduce and sort the invoices that display.
3. Click the magnifying glass on the right to view the actual invoice.

The screenshot shows the 'Invoices' page. On the left, there is a sidebar with navigation links: 'home', 'communications (1)', 'core facilities', 'my reservations', 'view requests', 'view funds', 'list all cores', 'invoices', 'reporting', 'manage groups', 'my labs', 'my departments', 'Johns Hopkins Medical Institutes', and 'people search'. The 'Invoices' section is active. Below the sidebar, there are 'Hide Filters' and 'Keywords' sections. A callout points to the 'Keywords' section with the text: 'Use filters to sort the invoices that display.' The main table displays a list of invoices with columns: 'Created On', 'Core', 'Invoice Number', 'Lab', 'Owner', 'Payment Numbers', 'Total Cost', 'Status', 'Approved By', 'Approval Status', and 'Actions'. A callout points to the 'Actions' column with the text: 'Click to view the invoice.' The table shows 30 out of 353 results (Page 1 of 12).

Created On	Core	Invoice Number	Lab	Owner	Payment Numbers	Total Cost	Status	Approved By	Approval Status	Actions
Mar 18 '13	Common Equipment Core	JHMI-CEC-153632	Pai, Sara (JHMI) Lab	Sara Pai	0090051493	\$806.56	Not Yet Paid	none	not required	[Magnifying Glass]
Mar 18 '13	Common Equipment Core	JHMI-CEC-153634	Harhaj, Edward (JHMI) Lab	Sheemia Stewart	0090050485	\$248.93	Not Yet Paid	none	not required	[Magnifying Glass]
Mar 18 '13	Common Equipment Core	JHMI-CEC-153633	Wu, TC (JHMI) Lab	TC Wu	0090051409	\$1,219.12	Not Yet Paid	none	not required	[Magnifying Glass]
Mar 18 '13	Common Equipment Core	JHMI-CEC-153636	Bhujwalla, Zaver (JHMI) Lab	Zaver Bhujwalla	0090045475	\$16.96	Not Yet Paid	none	not required	[Magnifying Glass]
Mar 18 '13	Common Equipment Core	JHMI-CEC-153635	Sears, Cindy (JHMI) Lab	Cindy Sears	0080002142	\$270.58	Not Yet Paid	none	not required	[Magnifying Glass]
Mar 18 '13	Common Equipment Core	JHMI-CEC-153638	Fuchs, Ephraim (JHMI) Lab	John Walters	0090051847	\$186.56	Not Yet Paid	none	not required	[Magnifying Glass]
Mar 18 '13	Common Equipment Core	JHMI-CEC-153637	Drake, Charles (JHMI) Lab	Sheemia Stewart	0090049500	\$84.80	Not Yet Paid	none	not required	[Magnifying Glass]

Editing an Invoice:

1. Once an invoice has been created by a core a financial delegate will have the opportunity to review the invoice and make corrections if necessary.
2. Click on 'Invoices' and click the magnifying glass to view the live invoice.
3. Review the charges and then click the \$ icon to see the PTAO the services are being charged too.
4. To update or split the charges between different PTAOs select each charge in the payment list, then update the PTAO section with the percentage of the charge you would like each PTAO to be billed and click save.

Managing PTAO Numbers in a Lab

PTAO numbers are used to create valid charges in iLab using valid information. **UVA sends a feed of all valid PTAO numbers to iLab nightly.** Every night, iLab will import these PTAO numbers, activate any new ones and deactivate any old ones.

How does a PI or Financial Delegate Assign PTAO Numbers?

1. Click "*my labs*" on the left hand side of your screen. If you are a manager of multiple labs, each lab will be listed.
2. Click on the lab name to open the management view.
3. On the lab's page, click the *Membership Requests & PTAO* tab to expand this section.
4. Click on the appropriate check boxes to provide the researcher's access to PTAO Numbers.

FAQ's

Q1: What if my PTAO is not in my lab?

A1: Contact your department administrator or PI if you are a lab member to confirm the PTAO is valid and active in Oracle. If a any string of the PTAO has ended prior to today's date or if the PTAO is on "Hold", the PTAO will not be accessible in iLab until the PTAO is extended or the hold is lifted.

Note: If the PTAO is anything other than a grant (the award does not start with a "G"), and you are a PI, Department Administrator, or Lab Manager role in iLab, complete the following:

- i. Log into iLab and select the PI's lab
- ii. Select the Membership Requests and PTAOs tab
- iii. Click the blue triangle next to "Request Access to Additional PTAOs"
- iv. Enter in the PTAO including dashes and -1248 at the end
- v. Click Submit
- vi. Once approved, log back into the lab and assign lab members access to the PTAO as this is **not done automatically**

If the PTAO is a grant or you are still unable to access your PTAO, please contact the ORCA Business Manager, currently Alicia Felt, at af7sb@virginia.edu

Note: Grants **are** automatically assigned to the PIs's lab of the PI associated with the PTAO in Oracle. If the PTAO is not accessible and changes have not been made to the PTAO in Oracle within the last 48 hours, contact the ORCA Business Manager.

Q2: How do I add someone to my Lab?

A2: You may add already existing iLab users to a lab. This means if the researcher has not registered with iLab you will be unable to add them to a lab until they do.

- Login to the PI's lab in iLab – iLab defaults to the Members tab
- From within the Members tab click "Link existing user" as you can only add lab members who have already registered for an iLab account.
- Enter the first or last name of the member you wish to add, assign them a role within the lab, and click "Invite" – you won't actually be inviting them to join the lab, rather you will simply be adding them to it. To help in determining which role to assign, please see role descriptions below.
 - o Member: Individual can only access the cores and make reservations and/or service requests
 - o Manager: Individual can link members, approve and/or edit members and member roles, request access to and assign PTAOs, access invoices, and access cores to make reservations and/or service requests. Essentially this individual has the ability to edit anything within the core that the PI can.
 - o Principal Investigator: Individual can link members, approve and/or edit members and member

roles, request access to and assign PTAOs, access invoices, and access cores to make reservations and/or service requests. The PI can select or identify lab members as managers and/or financial delegates so he/she can manage the administrative functions of the lab. The **financial delegate** features designates an individual as the contact ORCA or cores should reach out to if either has any financial questions.

The screenshot shows the iLab settings interface. It is divided into three main sections:

- Inventory Settings:** A section with a heading "Inventory Settings" and a sub-label "Default product owner to request owner". It contains two radio buttons, "Yes" and "No", with "No" selected. A "Change" button is to the right.
- Lab-wide approval settings:** A section with a heading "Lab-wide approval settings" and a sub-label "Click the pencil icon next to the person below whom you would like to make the financial approver." It contains two input fields: "Auto-approval threshold" with the value "500.0" and a warning icon, and "Cost coverage buffer" with the value "100" and a help icon. A "Save Settings" button is at the bottom right.
- Lab members and member settings:** A section with a heading "Lab members and member settings" and a table of members. The table has two columns: "Name" and "Auto Approval Amount". The members listed are Jennifer Jackson, Kaitlin Thomas, Michael M. Henson, and Lilliehummer Chapel, all with "Group default (\$500.00)" as their approval amount. Below the table is a button labeled "link existing user" which is circled in red. Below this button is a section titled "Add an existing user" with the sub-label "Invite additional members to this group" and a text input field with the placeholder "Start typing the name of the u".

“Image 1.1: Click Link Existing User – type the first or last name of the member you wish to add. Once added, assign them access to the PTAO(s) you wish them to have access to under the Membership Requests and PTAOs tab.”

Q3: Someone has left our Lab, how do I delete them from the lab?

A3: This may be done by following this path:

Login to iLab --> click ‘My Labs’ --> click the name of the lab which needs member(s) removed --> click ‘Members’ --> review the list of members and click the red X next to the member that should no longer be part of the lab.

If the member is no longer part of the institution please click ‘Leave iLab feedback’ up in the top right of your iLab page to submit a ticket to iLab support. Please tell them the name of the researcher who has left and to disable/delete their account

core facilities

my reservations

view requests

list all cores

invoices

reporting

manage groups

my labs

my departments

people search

Membership Requests

Members (4)

Bulletin board (0)

Group Settings

Inventory Settings

Default product owner to request owner

☐ Yes
☒ No

Change

Lab-wide approval settings

Click the pencil icon next to the person below whom you would like to make the financial approver.

Auto-approval threshold





500.0

Cost coverage buffer

100

Save Settings

Lab members and member settings

Name	Auto Approval Amount	Email	Phone	
Jennifer Isaacs	Group default (\$500.00)	jisaacs@muscc.edu		
Kathleen Thomas	Group default (\$500.00)	kthomas@muscc.edu	792-2471	
Michael W. Harris	Group default (\$500.00)	mharris@muscc.edu	843-792-8402	
Williamson, David	Group default (\$500.00)	dwilliam@muscc.edu	8437928402	

link existing user

Click to delete a member from the lab

Q4: How do I split charges on an invoice?

A4: This may be done by following this path:

Locating the invoice:

Login to iLab --> from the left panel click 'Invoices' --> A list of all invoices will appear, to refine the list use the 'keyword search' to type in the invoice number --> click 'Apply Filters' --> to the far right click the magnifying glass icon for the invoice you wish to view

home

communications (1)

core facilities

my reservations

view requests

list all cores

invoices

reporting

manage groups

my labs

my departments

people search

Invoices

Hide Filters

Keywords

Go

Date Added

Owner

Owner Institutions

Cores

Labs

Billing Event

Payment Number

External

Approved By

Approval Status

Apply Filters

Reset Filters

Displaying 30 out of 38 result(s). (Page 1 of 2)

Created On	Core	Invoice Number	Lab	Owner	Payment Numbers	Total Cost	Status	Approved By	Approval Status
Apr 04 '13	Glassware Washing Core	JHMI-GWC-158186	Isaacs, John (JHMI) Lab	Robert Delaney	0090052488	\$84.00	Not Yet Paid	none	not required
Apr 04 '13	Glassware Washing Core	JHMI-GWC-158192	Rudek-Renaut, Michelle (JHMI) Lab	Robert Delaney	0080012327	\$140.00	Not Yet Paid	none	not required
Apr 04 '13	Glassware Washing Core	JHMI-GWC-158179	Yegnasubramanian, S (JHMI) Lab	Vasan Yegnasubramanian	0090048011	\$238.00	Not Yet Paid	none	not required
Apr 04 '13	Cell Imaging Facility	JHMI-CIF-157850	Nelson, Bill (JHMI) Lab	Melissa Turnbull	0090047225, 0090037378	\$496.00	Not Yet Paid	none	not required
Apr 02 '13	Analytical Pharmacology Core	JHMI-APC-157381	Denmeade, Samuel (JHMI) Lab	Robert Delaney	0090035167	\$2,250.00	Not Yet Paid	none	not required
Apr 02 '13	Analytical Pharmacology Core	JHMI-APC-157382	Rudek-Renaut, Michelle (JHMI) Lab	Robert Delaney	0090047707	\$7,275.00	Not Yet Paid	none	not required
	Analytical						Nnt		

Splitting charges on an invoice: (Total invoice amount)

- From the total price column click the \$ icon
- This opens the payment information box
- To split all charges within the invoice select each check box in the service list
- Using the payment information below change the percentage field to the percent that should be applied to the first payment number
- click 'Add Split'
- repeat steps 4 & 5 until the splits total 100%.
- Click 'Save'

Invoice Total

\$84.00

Request: GWC-JI-885

Start: March 12, 2013

Owner: J

Actual cost: \$84.00

Proje

Invoice Details

DATE	ITEM DESCRIPTION	PMT.#	QTY	PPU	STATUS	TOTAL PRICE
March 12, 2013	Washing					
March 12, 2013	Preparation					
March 12, 2013	Autoclave					

charge	billing status	Cost Object	\$ amount		
Washing	Billing Initialized	0090052488	\$14.00	<input checked="" type="checkbox"/>	14.00
Preparation	Billing Initialized	0090052488	\$14.00	<input checked="" type="checkbox"/>	14.00
Autoclave	Billing Initialized	0090052488	\$56.00	<input checked="" type="checkbox"/>	56.00
			total selected:84.00		84.00

Invoice total: \$84.00

Update payment info for selected () charges

Cost Objects

1 100.0 % 0090052488

total allocated 100.0%

☒ make default for project?

add split

save

cancel

Splitting charges on an Invoice (Individual charges):

**note* the images use the term 'cost objects' please replace 'cost objects' with 'PTAO'*

1. From the *total price* column click the \$ icon
2. Select the individual charge (service) that needs to be split.
3. Click the *green split* icon next to the check-box.
4. Using the split payment box, complete the *percentage* field or *\$ amount* field with the amount to split, update PTAO number.
5. Click 'Add Split'
6. Repeat steps 4-5 until splits total 100%.
7. Click 'Save'

Invoice Total

\$84.00

Invoice Details

DATE	ITEM DESCRIPTION	PMT.#	QTY	PPU	STATUS	TOTAL PRICE
▼ Request: GWC-JI-885 Start: March 12, 2013 Owner: J						
		charge	billing status	Cost Object	\$ amount	
March 12, 2013	Washing					14.00
March 12, 2013	Preparation					14.00
March 12, 2013	Autoclave					56.00
Actual cost: \$84.00						84.00

Charges can be split to use multiple payment sources. Up to 10 splits are allowed.

Splitting Autoclave - \$56.00 total.

Please type in a split % or amount in the rows below. Entering 0 % or amount will delete the split.

split #	charge	percentage	cost object	\$ amount
1	Autoclave	100.0	0090052488	\$ 56.0

+ add split

total allocated: 100.000%

\$ 56.00

Please note, the total % needs to be 100% before you can save.

Save

Cancel

Invoice Total

.00

For customer