UVA MolMart PI/Financial Delegate iLab Manual

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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.
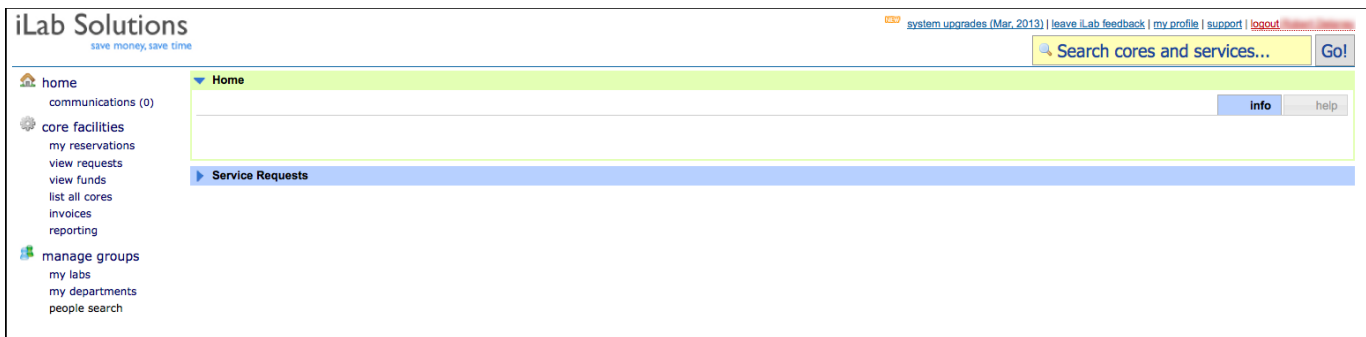
Navigating iLab:

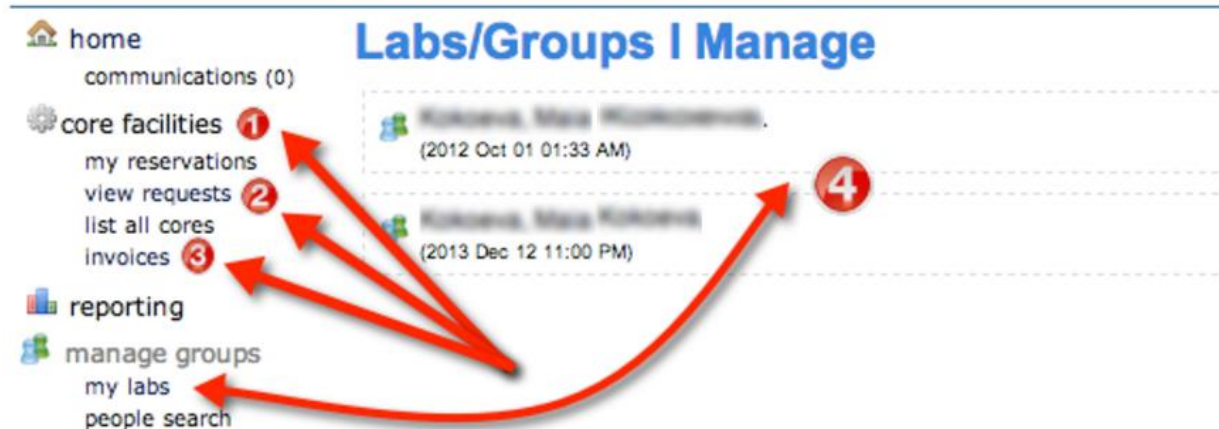The left hand navigation panel will be used for all iLab functionality.

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.


    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.**

    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
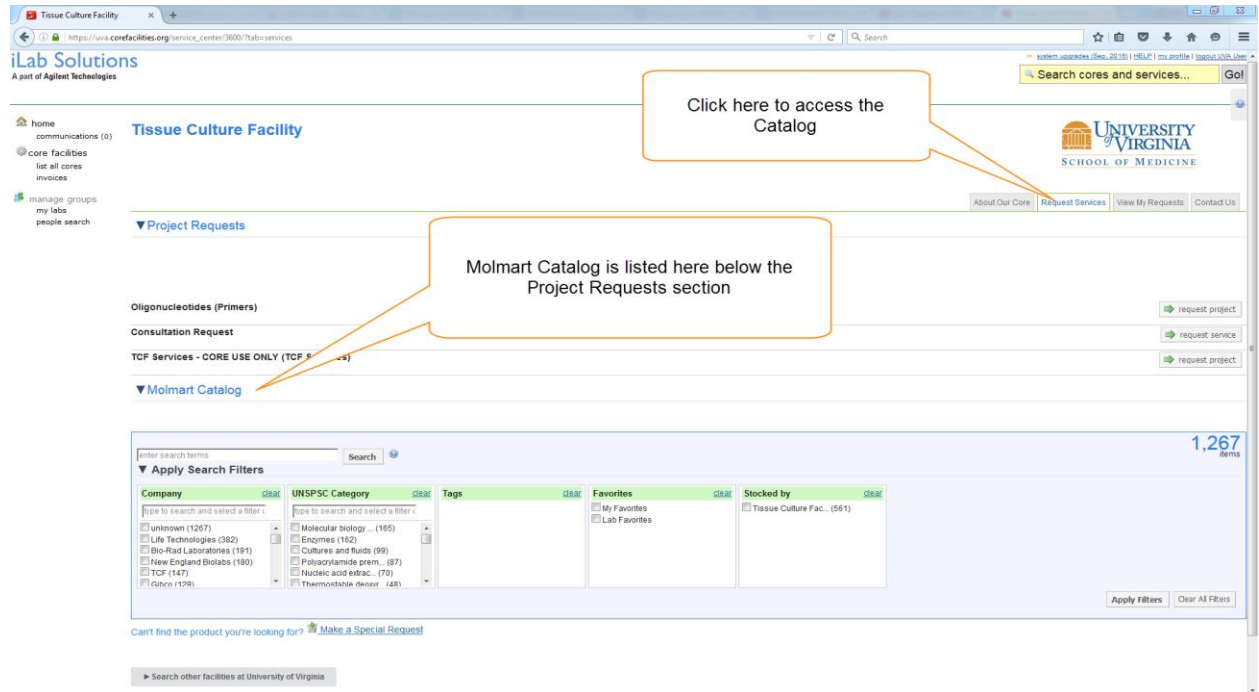
4. To add products to your "cart", either search the name of the product or select an appropriate filter to locate it
5. Then click the Price and Cart button associated with it to add to your cart
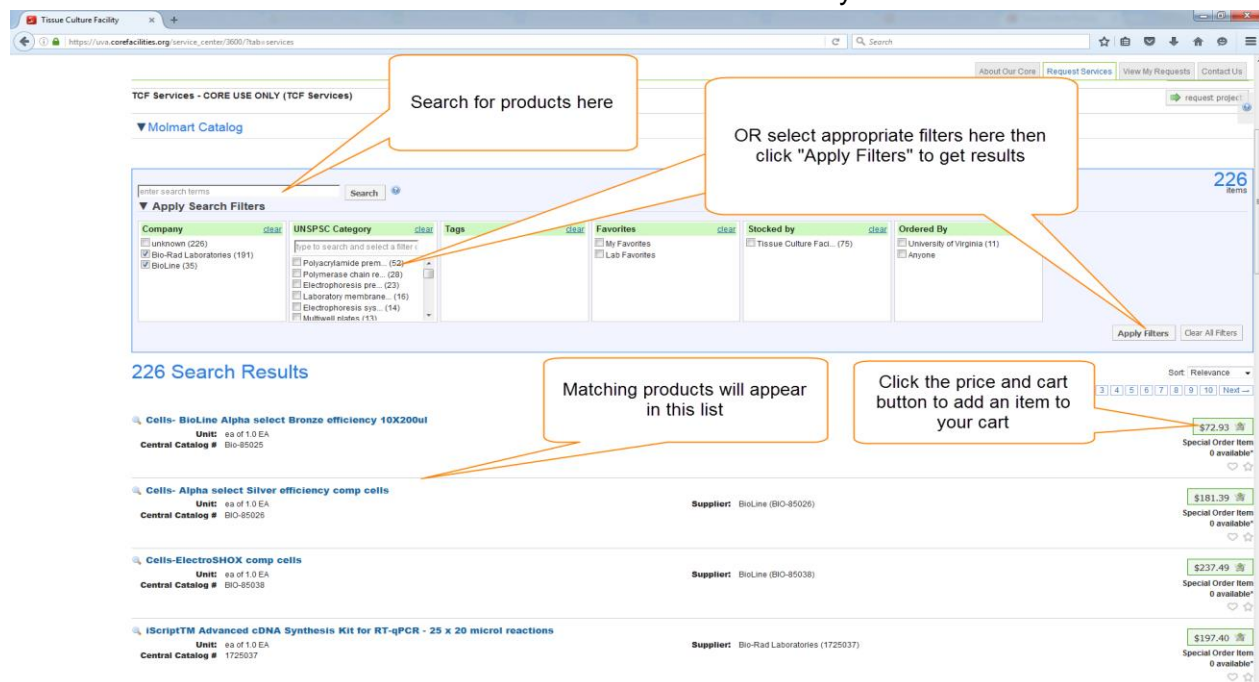
6. You can save products as personal favorites or lab favorites for future quicker searching
7. To submit, view or edit your cart find the floating cart options box at the top right of your screen

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)

8. 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

9. 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

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.

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 <u>Member</u>: Individual can only access the cores and make reservations and/or service requests
    - o <u>Manager</u>: 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 <u>Principal Investigator</u>: 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.

"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

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

Splitting charges on an invoice: (Total invoice amount)

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

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
	Washing	Billing Initialized	0090052488	$14.00	☐	14.00
March 12, 2013	Preparation					14.00
	Preparation	Billing Initialized	0090052488	$14.00	☐	56.00
March 12, 2013	Autoclave					56.00
	Autoclave	Billing Initialized	0090052488	$56.00	☑	
Actual cost: $84.00		Proje				34.00

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

Invoice Total   .00

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

For customer

⊕ add split

total allocated:100.000%   **$ 56.00**

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

Save   Cancel