Rutgers Faculty iLab User Manual

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Registration (For Faculty who are not pre-registered):

To get started, you must register for an account:

1. Navigate to the following URL into your browser: https://rutgers.ilab.agilent.com/account/login

2. Bookmark this URL for future use.

3. Once on the iLab login page, select ‘Sign in using Rutgers University credentials’

4. At this point you will be prompted to provide your Rutgers NetID and password

5. You will be directed to an authentication page where you will enter your Rutgers University credentials

6. Once you have entered your credentials, click the ‘Login’ button

7. You will be directed to an iLab Registration page where you will select PI/Lab and verify your contact information. Please select the “Admin (RUTGERS) Lab”.

8. Once your registration has been submitted, please contact Cristina Estillore (cristina.estillore@rutgers.edu) and Gabriela Alulema (galulema@research.rutgers.edu). They will create your lab in the system.
What to do when your project number is not in iLab:

Although most sponsored and 800 series projects will automatically be pulled into iLab from Oracle, other types of projects may require access approval. These typically include start-up, discretionary, 300 series project accounts.

1. From your lab’s page, click on the “Membership Requests & Project” tab.

![Membership Requests & Project tab](image)

2. Scroll toward the bottom of the page to view “Request access to additional Projects.”

![Request access to additional Projects](image)

3. Enter the project number you wish to request access to in the “Project Number” textbox and the task number in the “Task Number” textbox.

4. Click “Request”

5. A notification will be sent to the owner of the project number for approval. If you are the owner of the project, you will be able to approve your own request by clicking the link on the email notification and then selecting “Approve”.

![Notification to owner](image)
How to Accept Access Requests in iLab:

Users who wish to place requests for services and supplies on your lab’s behalf will request access to your group. Before users can access your group/lab page, you will have to approve their request.

1. From your lab’s page, click on the “Membership Requests & Project” tab.

2. Under “Membership Requests” will be the name of the member(s) who wish to join your lab.

3. You can choose to ‘Accept’ or ‘Reject’ the membership request. If accepted, the user will be added to your group/lab. You will then be able to assign funding to your user.

How to assign Project numbers to lab members

You can assign specific project numbers to every member of your lab.

1. From your lab’s page, click on the “Membership Requests & Project” tab.

2. Scroll toward the middle of the page to view “Manage Projects”. Here you will see a list of lab members and project numbers.

3. To assign a project number to a lab member, locate the row with the member’s name and check mark the individual project accounts you wish to assign them access to.
Requesting Services:

1. Click on the following link: [https://rutgers.ilab.agilent.com/service_center](https://rutgers.ilab.agilent.com/service_center)

2. Select “Sign in using Rutgers University credential” and login using your Rutgers NetID and password

3. On the following page, you will see a list of the available Rutgers “Core Facilities”. Select the core you wish to request services from.

4. On the core’s landing page, Select the Request Services tab
5. Click on the ‘Request Service’ button next to the service of interest.

6. You will be asked to complete a form before submitting the request to the core.

7. Your request will be pending review by the core. The core will review your request and either Agree to the work or they will ask for more information if needed.
Reserving Equipment:

To Create an Equipment Reservation:

1. Click on the following link: https://rutgers.ilab.agilent.com/service_center

2. Select “Sign in using Rutgers University credential” and login using your Rutgers NetID and password

3. On the following page, you will see a list of the available Rutgers “Core Facilities”. Select the core you wish to reserve equipment from.

4. On the core’s landing page, Select the **Schedule Equipment** tab

5. Click on the ‘View Schedule’ button next to the instrument of interest.
   Click and drag on the time frame you would like to schedule your reservation for.

6. A window will pop up that will allow you to verify your reservations details and provide payment information before saving the reservation.
7. Once submitted, the core will review the Schedule Equipment request. They will confirm or deny the request at that time.

   a. If the core accepts your request, your scheduled time will be confirmed. No further action is needed. You will be able to use the equipment at your designated time.

   b. If the core rejects your request, they may provide an alternate date or request additional information through a comment in iLab.

   *Please note: Some equipment requires training prior to use. A core may ask you to schedule training. A user may request training through the Request Services section of the core's page*
Invoices and Payments:

Invoices can be accessed through the link e-mailed to the user. A list of invoices is also accessible from the left-hand side navigation.

Invoices Interface
### Filters:
You can filter invoices on a wide variety of other attributes using the Filters panel. If the filter panel is not visible, click on the "Show filters" link in the upper-left. To use filters, use the black arrow to the left of each category to expand the filter you would like to search on. Then, select from the available entries.

### View Invoice Information:

<table>
<thead>
<tr>
<th>Created On</th>
<th>Core</th>
<th>Invoice Number</th>
<th>Lab</th>
<th>Owner</th>
<th>Payment Numbers</th>
<th>Price Types</th>
<th>Total Cost</th>
<th>Status</th>
<th>Approval Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar 14 '18</td>
<td>Flow Cytometry Facility</td>
<td>FCF-5244</td>
<td>Sample Lab</td>
<td>Sample Manager</td>
<td>23544</td>
<td>Internal</td>
<td>$325.00</td>
<td>Not Yet Paid</td>
<td>not required</td>
</tr>
<tr>
<td>Mar 14 '18</td>
<td>Flow Cytometry Facility</td>
<td>FCF-5243</td>
<td>Sample Lab</td>
<td>Sample Manager</td>
<td>22123</td>
<td>Internal</td>
<td>$500.00</td>
<td>Not Yet Paid</td>
<td>not required</td>
</tr>
<tr>
<td>Mar 13 '18</td>
<td>Flow Cytometry Facility</td>
<td>FCF-5240</td>
<td>Sample Lab</td>
<td>Sample Manager</td>
<td>22123, 23544</td>
<td>Internal</td>
<td>$965.00</td>
<td>Not Yet Paid</td>
<td>not required</td>
</tr>
</tbody>
</table>

- **Created on**: The date the invoice was created.
- **Core**: The core that issued the invoices for services rendered.
- **Invoice Number**: The number assigned to the invoice.
- **Lab**: The lab that is responsible for payment of the invoice.
- **Owner**: This is the person responsible for this invoice in the lab (the Primary Contact defined in the Group Settings).
- **Payment Numbers**: The various funds used to pay for charges on this invoice.
- **Price Types**: Each service will be charged at a specific price type, depending on the nature of the customer (in some case overridden by the Core administrator).
- **Total Cost**: Total amount charged on the invoice.
- **Status**: The status of the invoice (Paid or Not Yet Paid).
- **Approval Status**: Certain institutions require that the lab formally approves the invoice. In these cases, the approval status is listed in this column. Otherwise, it will show as not required.
## Invoice Actions

- **Notes and comments (text bubble icon):** The pop-up panel lets you add and edit notes and comments. The Notes for Core panel is only visible to core staff and can be used for internal notes. The Notes panel is used for general notes visible to both core and others. The Comments panel can be used for back and forth conversation between all users who have access to the invoice.

- **E-mail (letter icon):** For Core Administrators and Staff only. Send the invoice by e-mail to selected recipients, together with an optional message:

- **View invoice detail** (magnifying glass icon): Open up the full invoice (as discussed further in the Invoice Detail section)
Mark as paid / billed (button): For Core Administrators and Staff only. Clicking "Mark as paid" will change the status of the invoice to Paid. The button will change to "Mark as billed", and clicking it again will revert the invoice to Not yet Paid.

Viewing invoices
To view an invoice from the Invoices Interface, select the magnifying glass icon located to the right of each invoice line.

Sample Invoice:
Changing Project/Payment Information

To change the Project/Payment information that applies to an entire Service Request, find the request in the “View All Requests” tab of your core, and then click the dollar icon for that request:

This will open the service request fund window, which lists the charges that are part of the service request at the top.

To change the project account information you need to:

- Select the charges to which you want the new fund information applied.
- Select or change the desired payment method, as discussed in more detail in Payment Methods.

By checking the "make default for project?" check-box, the selected payment method will be used for any new charges added to the project.
How to identify iLab transactions in Oracle reports
(For Faculty’s Business Managers/Finance Team)

The following Oracle reports show the iLab transactions that have posted to a faculty user’s grant and/or departmental accounts:

RU PJ 073 Project Costs Detail Report:
- **Document Name** (Column L) – iLab transactions will be titled “RU iLab”
- **Expenditure Comments** (Column AA) – the corresponding iLab invoice number will be listed in this column. Please see the *Invoices and Payments* section of this document for instructions on how to view invoices and identify invoice numbers.

Account Analysis Report:
- **Account** (Column N) – For internal RU PIs, iLab transactions will be posted to Account #74125
- **Line Description** (Column W) – The Trx Source and Trx Doc will be titled <RU iLab>

Financial Management – Manage Cost Projects
- From the Rutgers Portal, click on *Financial Management (Oracle Cloud)*
- Next, select **Costs**
- On the following page, select the paper icon on the right hand-side to expand the menu.
- Under Review and Adjust, select *Manage Project Costs*

**Review and Adjust**
- Manage Project Costs
- Manage Committed Costs
- Manage Cost Distributions

- Click the triangle to the left of *Search* to expand the search table.

- Enter the Project Number you wish to look up and then enter **74125** in the Expenditure Type search box. All internal RU iLab transactions are posted to 74125.

- Click *Search* at the bottom right of the search table.

- All RU iLab transactions will be listed at the bottom of the page under *Search Results*

- Click on a transaction number to view more details. The invoice information will be in the Comment of the transaction details.
Additional iLab Help

Help Site: iLab offers numerous user training resources. Some training resources may be found in the Help Site at the following link: https://help.ilab.agilent.com/

You may use the search box to look up instructions on how to complete tasks in the iLab system.
Ex: If you would like more information on requesting services, you may type in “request services” in the search box.
Opening Tickets

- **Email**: For assistance from an iLab Support team member, you may email ilab-support@agilent.com. You will receive an automatic ticket number from Agilent-iLab Support. A team member will get back to you with a response. If needed, you can follow up with Agilent and reference the ticket number from your email.

- **iLab Support Portal**: You may also submit a support ticket directly from the iLab portal.
  1. Select the “Help” button on the top right corner of your homepage.
  2. On the iLab Support Portal, select “Submit a Ticket”.
  3. Fill in the form with a description of the issue you are encountering.
Reviewing Open Tickets

You can review all the tickets you have submitted directly from the Support Portal or by e-mail by clicking on the 'Review Tickets' button. This will open up the ticket review panel (some columns have been masked):

1. **Ticket filter:** By default, you will see all of your open tickets. However, you can also choose to review only your closed or all of the tickets. If you are an Institutional Administrator, you will also see options to view all open tickets and closed tickets across your entire organization (i.e. tickets submitted by all other users at your institution).

2. **Search:** Enter terms like ticket number or partial name to filter the list of tickets.

3. **Export CSV:** Download the displayed list of tickets to a .csv file.

4. **Ticket list:** Show all the tickets based on the applied filter criteria. Click on the ticket name or number to access its detailed information, such as current status or history.