

UNCCH iLab Integration Manual

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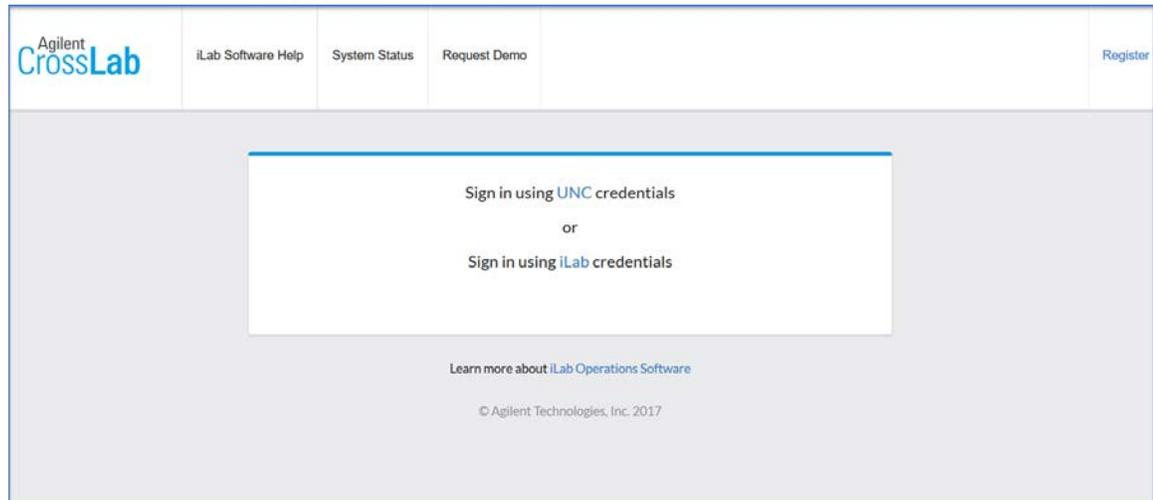
Overview

The iLab/UNCCH Financial Integration allows PIs, Financial Managers, Researchers and Core Managers to ensure that they are using valid payment information (Chartfield String) at each step of the request and billing process for core facilities. PI's and/or lab managers assign Chartfield String to individuals who should be able to order services from UNCCH cores. Researchers can order services with Chartfield String, and core managers can bill for these services knowing that they are using valid Chartfield String. This document can be used by core staff, PI's, and lab managers as a guide for using iLab. This document will review logging into and navigating iLab, assigning Chartfield String and making any appropriate changes to labs.

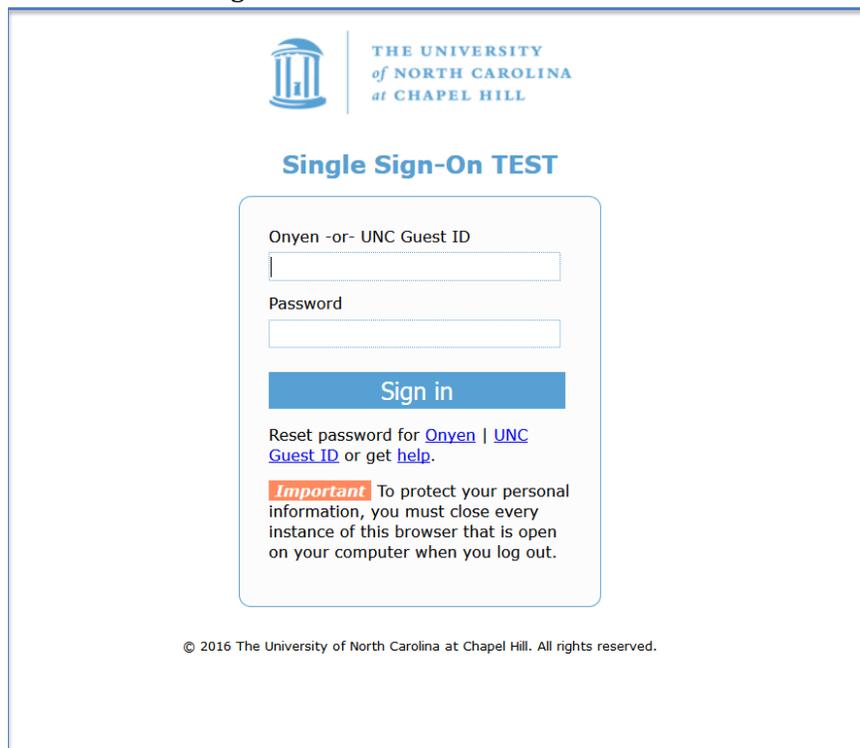


Logging into iLab:

1. Type the following URL into your browser: <https://uncch.ilab.agilent.com/>
2. Bookmark this URL.
3. Once on the iLab login page, login or register.



- a. Click “here” if you have a ONYEN. The next screen will be a familiar login screen for entering that information.



- b. If you do not have an iLab account, and you have a ONYEN, once you authenticate you will be directed to a registration page. You will need to select your PI and a request will be sent to your PI to approve your request.

iLab Account Registration

Hello Test User,

Welcome to iLab! Please choose your PI or group to get started!

PI/Group: ★

First Name: ★

Last Name: ★

Email: ★

Phone number: 📞 ★

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- c. If you do not have a UNCCH login (external user) and need an iLab account, follow the link below and provide all details during the registration wizard.
- 4. <https://uncch.ilab.agilent.com/account/signup/279>
- 5. Once logged in you will be on the iLab homepage dashboard. Make sure to set your timezone!

The screenshot shows the iLab homepage dashboard. At the top right, there is a search bar with the text "Search cores and services..." and a "Go!" button. Below the search bar, there is a "system upgrades Sep. 2016 | HELP | my profile | logout" link. The main content area is titled "Getting started" and contains a "Welcome to iLab!" message. Below the welcome message, there is a "Getting started" section with a list of steps: 1. Click on the core facilities link in the left hand menu, 2. Select a core from the list of cores, 3. On the core's page, click the 'about our core' tab to learn more about the available services, 4. To request services, click the 'request services' tab, 5. For cores with equipment, click on the 'schedule equipment' tab. At the bottom of the dashboard, there is a "Home" section with "info" and "help" links.

Navigating iLab:

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

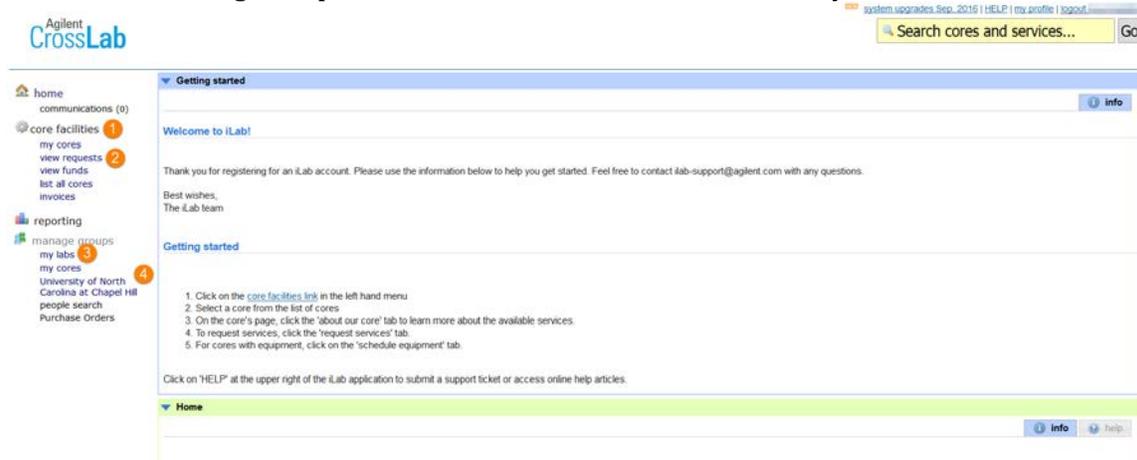


Image 1.1: Core Facilities:

- Click 'Core Facilities' to see any live UNCCH cores
- Use this to navigate to core facilities to work with.

Image 1.2: View Requests:

- Click 'View Requests' to see a list of requests per core. This area is where a **PI/Lab Manager can approve/deny requests or provide a Chartfield String**

Image 1.3: My Labs:

- Click 'My Labs' to see a list of the labs in which you manage.
 - Tip: you may also hover over 'My labs' to see a bubble of your labs.

Image 1.4: "University of North Carolina at Chapel Hill":

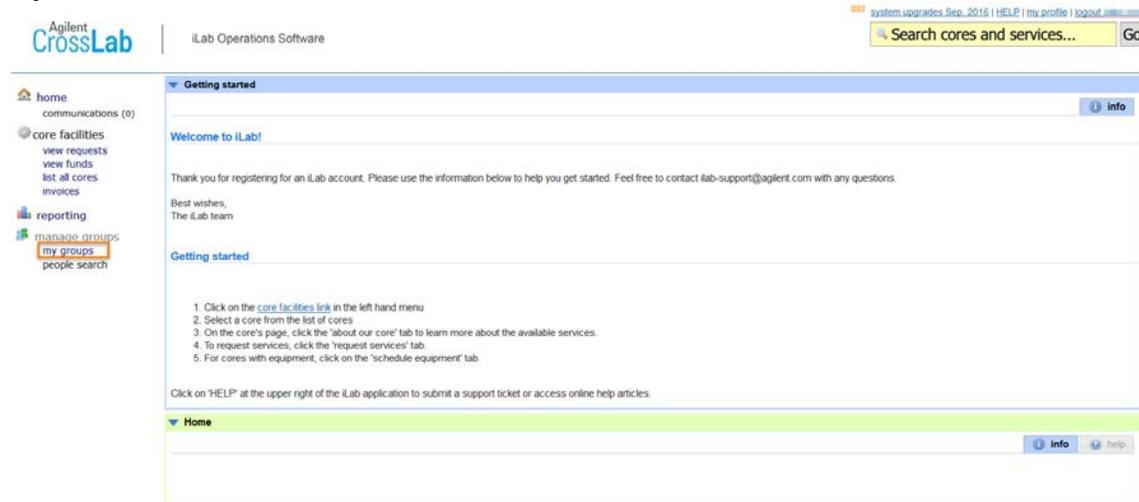
- NOTE: This link is **ONLY** available to those with Institution Admin membership.
- Click this link to access the Institutional Admin Dashboard which included a full list of cores (live and in development), Institution Admin memberships and a full list of internal labs

View Requests:

1. Click 'View Requests' to see all requests.
2. Use the tabs along the top to navigate between requests
 - a. **Awaiting Approval:** Displays any request made by a researcher from your lab to a core that has exceeded the pre-approved cost that the lab has set. This request now requires approval from a financial manager to proceed with the service request. Simply click 'Agree' or 'Disagree'.
 - b. **Require Payment Info:** Displays any request made by a researcher that does not have A Chartfield String selected to charge the request against.
 - i. To update, simply click the \$ icon and select a Chartfield String. Click save.
 - c. **Processing and Recently Completed:** Displays all current or recently

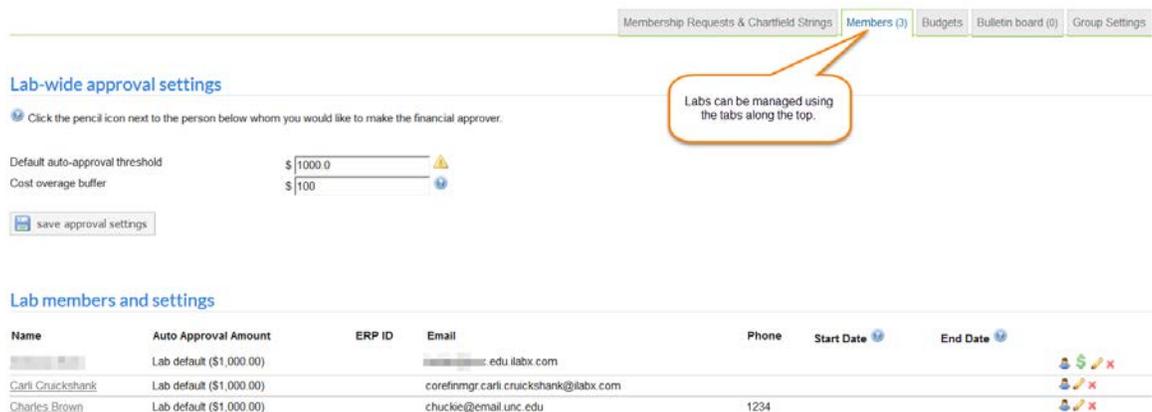
- finished request from any researcher within your department(s).
- d. **All Requests:** Display all requests from anyone within your department.

My Labs:



1. Click 'My Groups' to see a list of labs you manage.
2. Click the lab name to enter into the lab to adjust settings, members, Account assignments.

[Agilent CrossLab \(UNC\) Lab](#)



3. Pending access requests:
 As new members register for their iLab account they will need to be included in a lab so that they may be assigned Chartfield String(s).
 You will receive an email when a new researcher is awaiting access to a lab.
Login to iLab → Click on 'my labs' → click the lab → Click 'Membership Requests & Chartfield Strings' this will show any pending approvals → approve the access request, or if the researcher selected the incorrect lab use 'change lab' to update their membership and then 'approve'.
 After approving, assign Chartfield String(s) to the new researcher.

Assigning a lab manager:

1. Navigate to “Members” tab in the lab.
2. Select the Yellow edit pencil.

Abels, Kimberly (UNC) Lab

Membership Requests & Chartfield Strings **Members (3)** Budgets Bulletin board (3) Group Settings

Lab-wide approval settings

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

Default auto-approval threshold \$ 1000.0
Cost coverage buffer \$ 100

save approval settings

Lab members and settings

Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date	End Date	
Kimberly Abels	Lab default (\$1,000.00)		kabels@unc.edu.ilabx.com				
Carli Cruickshank	Lab default (\$1,000.00)		corefinmgr.carli.cruickshank@ilabx.com				
Charles Brown	Lab default (\$1,000.00)		chuckie@email.unc.edu	1234			

add new user link existing user

3. Open the “Lvl” drop down menu to update the user’s role.
 - a. Select ‘Manager’ here to delegate user/fund approval authority.

Abels, Kimberly (UNC) Lab

Membership Requests & Chartfield Strings **Members (3)** Budgets Bulletin board (3) Group Settings

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Carli Cruickshank	Lab default (\$1,000.00)		corefinmgr.carli.cruickshank@ilabx.com				
Charles Brown	Lab default (\$1,000.00)		chuckie@email.unc.edu	1234			

add new user link existing user

4. Select the “Financial Contact” checkbox to delegate financial notifications.

Invoices:

1. Click 'Invoices' to see a list of all invoices created by any core.
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.

Invoices

Created On	Core	Invoice Number	Lab	Owner	Payment Numbers	Price Types	Total Cost	Status	Approval Status	
Oct 12 '17	Proteomics Facility	PF-3689	Gray, Steven (UNC-CH) Lab	Steven Gray	25210-49200-...	Internal	\$13.00	Not Yet Paid	not required	mark as paid
Oct 12 '17	Proteomics Facility	PF-3688	Gray, Steven (UNC-CH) Lab	Steven Gray	25210-49200-...	Internal				mark as paid
Oct 12 '17	Proteomics Facility	PF-3686	Gray, Steven (UNC-CH) Lab	Steven Gray	25210-49200-...	Internal	\$13.00	Paid	not required	mark as paid
Oct 12 '17	Proteomics Facility	PF-3687	Burridge, Keith (UNC-CH) Lab	Keith Burridge	25210-49000-... 25210-49000-4...	Internal	\$124.00	Not Yet Paid	not required	mark as paid
Oct 12 '17	Flow Cytometry Facility	FCF-3683	Grant, Judah (RCCC) Lab	Cletus Auer	PO12345	External	\$37.50	Not Yet Paid	not required	mark as paid
Oct 12 '17	Flow Cytometry Facility	FCF-3682	Jones, Corbin (UNC) Lab	Corbin Jones	25210-49000-...	Internal	\$612.00	Not Yet Paid	not required	mark as paid
Oct 12 '17	Flow Cytometry Facility	FCF-3681	Bautch, Victoria (UNC) Lab	Victoria Bautch	25210-49000-...	Internal	\$3,876.00	Not Yet Paid	not required	mark as paid
Oct 12 '17	Flow Cytometry Facility	FCF-3680	Gray, Steven (UNC-CH) Lab	Steven Gray	25210-49200-... 25210-49200-29101-15191...	Internal	\$431.00	Not Yet Paid	not required	mark as paid
Oct 12 '17	Flow Cytometry Facility	FCF-3679	Abels, Kimberly (UNC) Lab	Kimberly Abels	25236-49000-...	Internal	\$3,042.60	Not Yet Paid	not required	mark as paid
Oct 12 '17	Flow Cytometry Facility	FCF-3678	Philpot, Benjamin (UNC-CH) Lab	Benjamin Philpot	25210-49500-... 25210-49200-...	Internal	\$148.00	Not Yet Paid	not required	mark as paid

To View an Invoice:

1. Once an invoice has been created by a core, a PI or Lab manager will have the opportunity to review the invoice and make corrections if necessary.
2. Click on 'Invoices' in the left hand menu
3. Then click the magnifying glass to view the live invoice.

To Update or Change the Chartfield String:

1. Review the charges and then click the \$ icon to view the Chartfield String being charged
2. Change or split the charges between Chartfield String(s), select a charge in the payment list
3. Update the Chartfield String section and click save.

This is a screenshot of an invoice and how to change the Chartfield String associated with it.

THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

Invoice No. PF-3447
Invoice Date September 27, 2017
Lab UNC-CH) Lab

From: Proteomics Facility To: Gray Steven (UNC-CH) Lab | Steven Gray

[show additional contacts](#)

Invoice Total \$26.00

DATE	ITEM DESCRIPTION	PMT#	QTY	PPU	STATUS	
September 26, 2017	charge	billing status	Chartfield String	amount		\$26.00
	Illumina CNV370 arrays	Billing initialized	Multiple Chartfield Strings...	\$26.00		\$26.00
	Illumina CNV370 arrays	50.000%	25210-49200-	\$13.00		\$13.00
	Illumina CNV370 arrays	50.000%	25210-49000-	\$13.00		\$13.00
selected charge(s) total: \$0.00						

Actual cost: \$13.00 Invoice total: \$26.00

Update payment info for selected (4) charges

Chartfield Strings 100.0

total allocated 100.0%

make default for project?

payment notes

Managing Chartfield String(s) in a Lab

Chartfield String(s) are used to create valid charges in iLab using valid information sourced from UNC. UNC allows any PI or lab manager to request non-sponsored funds within their labs.

The chartfield string in iLab does not display all of the fields used in Connect Carolina. All of the required fields are present but the view is concatenated. It will show the user the most important elements and allows space for titles associated with projects within a lab.

The following elements display:

Fund-Source-Department-Project ID-ProgramCode-CostCode1-CostCode 2-Cost Code3

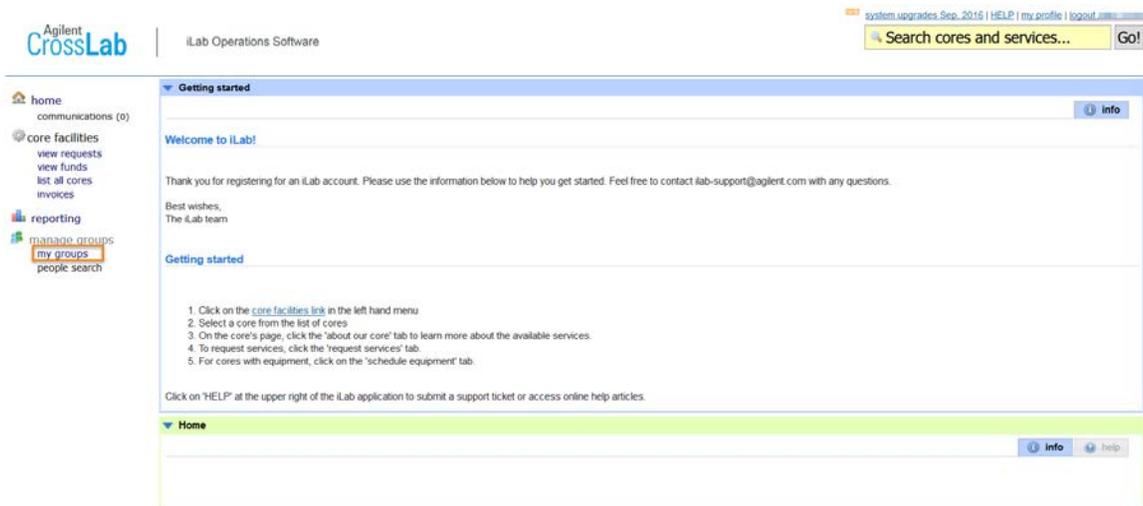
Hover over the chartfield display will show the fund title and expiration date when applicable.

The account number is set within the core facility based on the product or service offered.

It does not appear to the user but will populate when billed to the financial system.

How do I Assign and manage Chartfield String?

1. Hover over or click on the *my groups* menu option on the left hand side. Click the name of the lab to enter the lab.



2. On the lab's page, click the *Membership Requests & Chartfield String* tab to expand this section.
3. Click on the appropriate check boxes to provide the researcher's access to Chartfield String(s). Assign Chartfield String(s) for each researcher on the list, when the box turns green it means the Chartfield String information has been applied to the researcher.

(UNC-CH) Lab

Membership Requests & Chartfield Strings | Members (2) | Budgets | Bulletin board (2) | Group Settings

Membership Requests

✔ No Access Requests require approval

Manage Chartfield Strings

Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

Name	Default Chartfield String	25210-49000 - Grant Axonal Neurogpathy Gene 7	25210-49000 - Combination Therapy Biomarker	25210-49000 - Directed Evolution of Novel AA	25210-49000 - SUBCOM/TULANE NATIONAL PRIMATE	25210-49000 - FELLOW/SABR R. Treatment of
Steven	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Kimberly	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Robert	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Request access to additional Chartfield Strings

Disable/Enable Chartfield Strings

Select check boxes to assign Chartfield Strings to different members.

How do I request a new Chartfield String within my lab? (Non-sponsored)

1. If the Chartfield String is needed for a lab member to charge services against does not exist in the fund grid, one may be requested.
2. To do this simply click the *Request access to additional Chartfield String* section which appears below the fund grid.
3. Here you will see instructions on how the new Chartfield String needs to be entered.
4. Once approved the Chartfield String will appear in the fund grid above. Assign it to the necessary lab member(s) so that they may use it as a payment option

Request access to additional Chartfield Strings

If you don't see a Chartfield String that you should have access to, please type it in below. The Account Manager will receive a notification and approve or deny your request.

(Optional help text to request additional chartfield string)

Chartfield String

Chartfield String will appear as you complete. Then click 'Request'

Chartfield String	Requested on	Status	Owned by	Resolved on	Resolved by	Notes by Account Manager	Archive request
27101-14101	Oct 13 '17	pending	John				

After the request is made the Chartfield String will appear below as pending until approved.

Disable/Enable Chartfield Strings

*If the chartfield does not display after searching, please email coresupport@med.unc.edu and request the chartfield for it appear in the iLab fund grid.

FAQ's

Q: How do I add someone to my Lab?

A: You may add already existing iLab users to a lab. This means if the researcher has not registered their Chartfield String with iLab you will be unable to add them to a lab until complete.

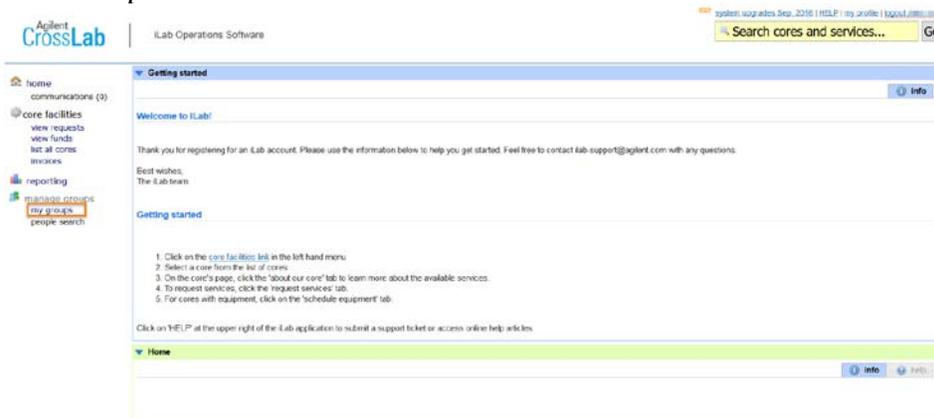


Image 1.1: Click the name of the lab that needs a new member added

Image 2 - Lab Page

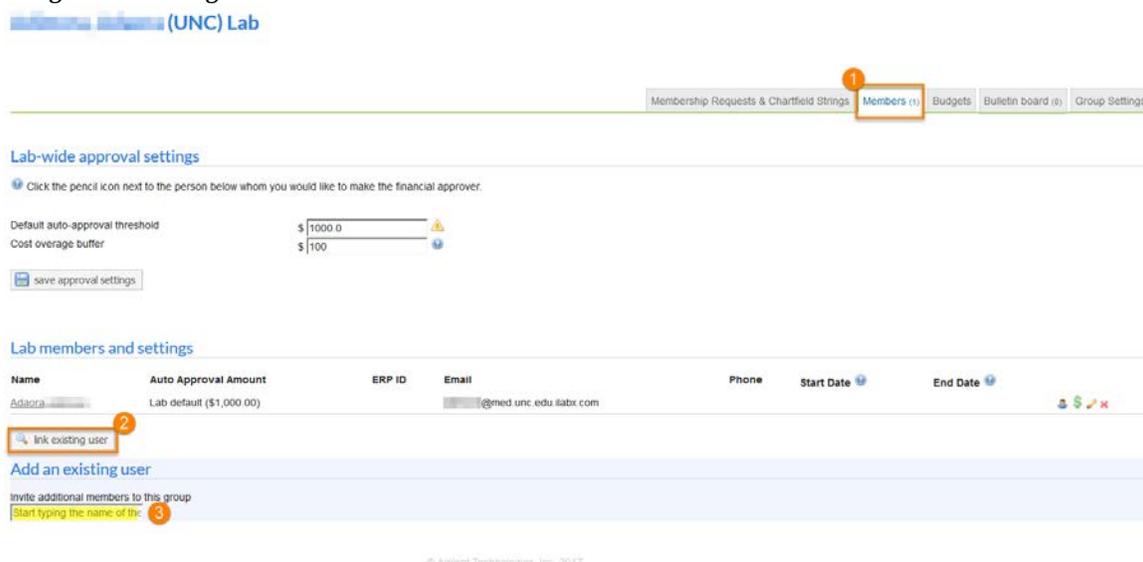


Image 2.1: Click Link existing user. Then use the search box to type the name of the member to add. They must be registered to locate them in the search

Be sure to give them access to Chartfield String(s) after inviting them to the lab.

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

A: Follow these steps:

- Login to iLab

- Click the name of the lab which needs member(s) removed
- Click 'Members'
- Review the list of members
- Click the **red X** next to the member that should no longer be part of the lab.

Alternately, you may click on the yellow pencil, enter an expiration date for your lab member and click save.

If the member is no longer part of the institute, please click 'Help' 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

 Kimberly (UNC) Lab

Membership Requests & Chartfield Strings | **Members (3)** | Budgets | Bulletin board (0) | Group Settings

Lab-wide approval settings

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

Default auto-approval threshold: \$ 1000.0  

Cost overage buffer: \$ 100 

 save approval settings

Lab members and settings

Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date	End Date	
Kimberly	Lab default (\$1,000.00)		@unc.edu.ilabx.com				  
Carl Cruckshank	Lab default (\$1,000.00)		corefinmgr.carl.cruckshank@ilabx.com				  
Charles	Lab default (\$1,000.00)		@email.unc.edu	1234			  

 link existing user

Note: A callout box points to the delete icon (red X) in the 'End Date' column, stating: 'Click to delete a member from the lab.'

Q: How do I split charges on an invoice?

A: Follow these steps:

1. Locate 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'
- Click the magnifying glass icon for the invoice you wish to view you will find this icon on the far right side of the screen

Invoices

Hide Filters

Keywords Go

Displaying 30 out of 33 result(s) (Page 1 of 2)

Created On	Core	Invoice Number	Lab	Owner	Payment Numbers	Price Types	Total Cost	Status	Approval Status	
Oct 12 '17	Proteomics Facility	PF-3689	Gray, Steven (UNC-CH) Lab	Steven Gray	25210-49200-...	Internal	\$13.00	Not Yet Paid	not required	mark as paid
Oct 12 '17	Proteomics Facility	PF-3688	Gray, Steven (UNC-CH) Lab	Steven Gray	25210-49200-...	Internal				mark as paid
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Oct 12 '17	Flow Cytometry Facility	FCF-3680	Gray, Steven (UNC-CH) Lab	Steven Gray	25210-49200-... 25210-49200-... 29101-15191-...	Internal	\$431.00	Not Yet Paid	not required	mark as paid
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Apply Filters | Reset Filters

Use filters to sort invoices that display.

Click the Magnifying glass icon to view the invoice.

2. 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 **\$512.00**

Invoice Details

DATE	ITEM DESCRIPTION	PMT.#	QTY	PPU	STATUS	TOTAL
September 28, 2017	charge	billing status	Chartfield String		amount	
September 28, 2017	Phosphoprotein Enrichment - Hourly Rate	Billing Initialized	25210-49000-318200-			90.00
September 28, 2017	Phosphoprotein Enrichment - Hourly Rate	Billing Initialized	25210-49000-318200-			18.00
September 28, 2017	Phosphopeptide and phosphoprotein Enrichment	Billing Initialized	25210-49000-318200-			99.00
September 28, 2017	Peptide Sequencing with MS/MS (Low Resolution)	Billing Initialized	25210-49000-318200-			34.00
September 28, 2017	Protein Analysis by Experion	Billing Initialized	25210-49000-318200-			24.00
September 28, 2017	Protein In-Gel Digestion	Billing Initialized	25210-49000-318200-			37.00
selected charge(s) total: \$0.00						
						Invoice total: \$512.00

Actual cost: \$512.00

Update payment info for selected (▼) charges

Chartfield Strings: %

total allocated

make default for project?

payment notes

3. Splitting charges on an Invoice (Individual charges):

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

UNCCH Billing Process

- 1. Per OSR policy, core facilities must invoice at least once a month. The billing process can run more frequently if the core chooses to do so.**
- 2. A sponsored project will be available in the billing file for 60 days after the budget end date. You will receive an error message if a charge is not processed by this cut off. Another payment option must be selected in order to proceed sending the charge to Connect Carolina for processing.**
- 3. Budget end dates are updated in iLabs one day following the change to budget end date in Connect Carolina.**