**Overview**

The iLab/ASU Financial Integration allows researchers, PIs, Financial Managers and Core Managers to ensure that they are using valid payment information (Account Numbers) at each step of the request and billing process for core facilities. Financial Managers assign Account numbers to individuals who should be able to order services from ASU cores. Researchers can order services with valid Account Number, and Core Managers can bill for these services knowing that they are using valid Account numbers. This document can be used as a guide to financial managers as a guide to using iLab. This document will review logging into iLab, Navigating iLab, Assigning Account numbers and making any appropriate changes to labs under their respective financial and/or Department managers.

**Logging into iLab:**

1. Type the following URL into your browser: [https://asu.corefacilities.org](https://asu.corefacilities.org) Bookmark this URL.
2. Once on the iLab login page click the ‘click here’ to login or register.
3. This will bring you to the ASURITE ID portal. Here enter your ASURITE user ID and password.
4. If you’ve not logged into iLab before you’ll need to register. Complete the registration form and click register.

5. Once logged in you will be on the iLab homepage dashboard.
Navigating iLab:
The left hand navigation panel will be used for all iLab functionality.

**Image 1.1: View Requests:**
- Click ‘View Requests’ to see any request from any researcher from any lab or department that you manage.
- Use this to view and approve requests that are pending PI approval.

**Image 1.2: Invoices:**
Click ‘Invoices’ to see a list of invoices created by a core for any lab within your department. 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 1.3: My Departments:
- Click ‘My Departments’ to see a list of the departments in which you manage.
  - Tip: you may also hover over ‘My Departments’ to see a bubble of your departments.
- Click on a department name to see the labs within that department.

Image 1.4: Pending lab access request:
- Lab access requests appear when a new lab member has registered their iLab account. They must be accepted into a lab and assigned Account’s before using the core facilities.
- Click the link to approve the member and assign funds.

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 department 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 an Account number selected to charge the request against.
      i. To update, simply click the $ icon and select an Account number. 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 Departments:
1. Click ‘My Departments’ to see a list of departments you manage.
2. Click ‘View’ to go view the department settings.

3. Pending access requests
   a. As new members register for their iLab account they will need to be included in a lab so that they may be assigned Accounts numbers.
   b. You will receive an email when a new researcher is awaiting access to a lab.
   c. Login to iLab → Click on ‘my departments’ → click ‘view’ → Pending Lab Access Request will automatically cascade open and show any pending approvals → approve the request, or if the researcher selected the incorrect lab use ‘change lab’ to update their membership and then ‘approve’.
   d. After approving, view the lab to assign Account numbers to the new researcher. (See managing Account Numbers in iLab for additional instructions)
Invoices:

1. Click ‘Invoices’ to see a list of all invoices created by any core for any lab within your department.
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, the PI and department manager will have three days to review the invoice and make corrections if necessary.
2. Click on ‘Invoices’ and lick the magnifying glass to view the live invoice.
3. Review the charges and then click the $ icon to see the Account Number the services are being charged too.
4. To update or split the charges between different Account numbers select each charge in the payment list, then update the Account number section and click save.
Managing Account Numbers in a Lab

Account numbers are used to create valid charges in iLab using valid information sourced from the grants & contracts accounting system. **ASU sends a feed of all valid Account numbers to iLab nightly.** Every night, iLab will import these Account numbers, activate any new ones and deactivate any old ones.
How does a Department Manager Assign Account Numbers?

1. Hover over or click on the *my departments* menu option on the left hand side. If you are a manager of multiple Departments, each department will be listed.

2. Click on the department name to open the management view, then click on the lab title.

3. On the lab’s page, click the *Manage Account/Project Numbers* panel to expand this section.

4. Click on the appropriate check boxes to provide the researcher’s access to Account Numbers. After assigning Account numbers for each researcher on the list, click the *save* button at the bottom of this section.

Requesting Department funds

iLab will only feed in sponsored funds to a lab automatically. Those sponsored funds will update each night and refresh the grid with any newly awarded funds and remove any expired project Accounts.

Though there are instances where labs occasionally pay for their invoices using a department level Account. In that scenario the PI and or the department manager of that lab will need to request
access to the department fund. Once a request has been made for that fund the department manager which manages the department which the requested fund belongs will be notified to approve access. Upon approval the fund will appear in the requesting lab and the PI and/or department manager can assign the fund to any lab members who should have the ability to charge against it.

Listed below are steps to guide a PI and/or department manager through requesting access to a department fund.

**How do I get a department fund to appear in a lab I manage?**

1. Login to iLab
2. Click on ‘My Departments’
3. Click the lab title of the lab you wish to request a department fund.
4. Click the Membership Requests & Projects’ tab.
5. Listed below the grid of project Account’s and Members you will see an option that says ‘request access to a fund’ toggle that open by clicking the blue triangle.
6. Here you can type in the department Account which the lab needs access to. The value is sensitive and should be in the format of nnnnn-__ or nnnnn-nn (n=number)
7. Click ‘request access’ if the fund is available in the feed iLab is receiving from ASU, a notification will be sent to the department manager to approve. If the fund is not available in the feed that iLab is receiving from ASU you will see an error message, as seen below.
8. Once your fund has been approved by the department manager go back into the lab and see the fund display in the grid on the ‘Membership requests and Projects’ tab. Check off the boxes next to each member that should have access to the fund.

**I’m a department manager, how do I approve a requested fund?**

1. Login to iLab
2. Click ‘View funds’ from the left hand panel
3. Here you will see a list of any pending fund requests.
4. Click ‘Approve’ to provide access of the fund to the requesting lab. Use the ‘note’ field to provide a note.
5. Click ‘Reject’ to not allow use the of the requested fund by the requesting lab.

**I’m trying to apply a department fund to an invoice but don’t see it as an available payment option. What do I do?**

1. Make sure you’ve requested the department fund by following the instructions ‘How do I get a department fund to appear in my lab’ listed above.
2. Once the requested fund has been approved you must go into the lab and provide access to each member of the lab that may need to charge or bill against it.
3. If you do not assign the fund to the lab members on the ‘Membership requests & Projects’ tab you will not see the department fund display as an available payment option on an iLab invoice.
4. Once assigned click the ‘Invoices’ link in the left hand panel.
5. Locate your invoice and click the magnifying glass to review.
6. Select the payment icon ($) to review or update payment info.
7. If payment needs to be applied to a different Account place check marks in each of the services listed in the payment window
8. Next select the appropriate Account from the payment drop-down.
9. Click ‘Save’

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 NetID account with iLab you will be unable to add them to a lab until they do.

Image 1

Image 1.1: Click ‘Departments’ to view a list of departments you manage
Image 1.2: 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 have registered their NetID to locate them in the search

**Be sure to give them access to Account numbers after inviting them to the lab.**

Q: Someone has left our Lab, how do I delete them from the lab?
A: This may be done by following this path:
Login to iLab --> click ‘Departments’ --> 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 institute 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.
Q: How do I split charges on an invoice?
A: 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):

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 Account number.
5. Click ‘Add Split’
6. Repeat steps 4-5 until splits total 100%.
7. Click ‘Save’
### Invoice Total

#### Invoice Details

<table>
<thead>
<tr>
<th>DATE</th>
<th>ITEM DESCRIPTION</th>
<th>PMT. #</th>
<th>QTY</th>
<th>PPU</th>
<th>STATUS</th>
<th>TOTAL PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 12, 2013</td>
<td>Washing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>March 12, 2013</td>
<td>Preparation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>March 12, 2013</td>
<td>Autoclave</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Actual cost:** $84.00

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### Splitting Autoclave – $56.00 total.

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

<table>
<thead>
<tr>
<th>split #</th>
<th>charge</th>
<th>percentage</th>
<th>cost object</th>
<th>$ amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Autoclave</td>
<td>100.0 %</td>
<td>0090052486</td>
<td>$ 56.00</td>
</tr>
</tbody>
</table>

**total allocated:** 100.00%

$ 56.00

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

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**For customer**