iLab Core Admin FAQ
Research Resource Program
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Agenda

▪ Equipment Scheduling
▪ Service Requests
▪ Billing
▪ PO & IOC
  • External billing process & IOC form submission
▪ Core Visibility
  • People Tab
  • Advance messaging
  • Equipment & Service classification
▪ Questions
iLab Log in

Logging in:

- Go to https://ucsf.ilab.agilent.com/account/login
  - Bookmark this URL for future use
- Log in with your usual University of California San Francisco credentials
- Look for the link in the left-hand menu that says 'my labs'. Hover-over and select your lab to go to your lab management page.
Equipment Scheduling

- Updating Pricing Information
- Confirmation page
  - Changing user group/lab
  - Filters
  - Use & Cost
    - If you core provides specific training requirements or usage types and you receive an error, you might need to toggle the override button.
Edit Service Request Status

Displaying 6 out of 6 results. (Page 1 of 1)

<table>
<thead>
<tr>
<th>Date</th>
<th>For</th>
<th>Service ID</th>
<th>Status</th>
<th>Payment Number</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sep 20</td>
<td>Blake Researcher</td>
<td>UCSFTC-BR-[CID]</td>
<td>Waiting to Submit to Training Request</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Overview

Service ID: UCSFTC-BR-[CID]

Subject ID:

Summary: (suggested limit 25 characters)

Request Summary:

Related data:

Status: Service Center in Agreement

Lab: iLab Test (Testing) Lab

Projected cost: 0.00

Quote expires on:

Default Billing Status:

Save

cancel
• Service request history can help determine the status of a request
• Comment section is a useful tool for customer communication
Core Visibility

- Equipment and Service classification
  - Find a list of classification terms in the eagle-l resource ontology [here](#)
  - Find a list of internal and external cores clicking on "Core Facilities" [here](#)

- People Tab
  - Advance messaging
    - Notices for new equipment, equipment down time, etc.
    - Email vs advance messaging
  - Using Filters
Edit Equipment -> Add Classification

Settings for "Parnassus Equipment"

Basic Information

Schedule Name *

Parnassus Equipment

Scheduled Resource Description

Category

Parnassus Test

Time Zone

(GMT-08:00) Pacific Time (US & Canada)

Classification

Calendar Notes

RRP iLab Training
Billing

- Billing Event overview
  - Filtering and organizing billing events; useful when reviewing for errors or a specific service or lab user
  - Expired funding: What to do when a speedtype project has expired or nearing expiration
    - Funding that will expire before the end of the month will not be valid at the time of billing
    - Use the iLab communication tool (Conversation bubbles) to request a new fund – LM resource: https://help.ilab.agilent.com/36900-managing-your-group/300355-view-requests

- What to do when a lab member is no longer part of the lab? (I.e 'Identify User' error)
  - Resubmit request/reservation under PI directly

- What if a customer provides updated billing information for several reservations that have already been confirmed?
  - Use the View All Requests tab to filter by user for update
Billing Cont.

- External Payment Tab
  - **IOC Information Form** forward this form to UC customers – submitting IOC information via this form ensures proper COA details are collected
  - Core departments are responsible for submitting IOC forms for wire processing
  - Additional information available via Controller's Office Website: https://controller.ucsf.edu/forms/accounting-reporting/ucsf-intercampus-order-andor-charge-ioc-ufin-116-2

- Refunds or updating speedtypes *after an invoice is generated*
- Speedtype search available via Charge Entry
- Sundry Debtor Submissions
  - The RRP Finance team now handles all core Sundry Debtor *submissions* -- collection efforts are still the core department responsibility
Billing Error Examples

• A valid speedtype was provided at the time of service but has since become invalid or access was removed by PI/Lab Manager

  payment number status actions
  Multiple: $  Billing Initialized
  100.0% MPSDSM0007

• Missing payment information

  Multiple: $ Billing Initialized
  No payment info set ...

• Speedtype will expire before end of month, ensure expiration date is after scheduling billing date

  payment number status
  Multiple: $ Ready To Bill
  100.0% MPHKIRY009
Reporting:

- **Reporting Settings**
  - Date range: based on billing event date added when choosing billing date in "Select date field"
  - Select date field:
    - **Purchase date**: The *Purchase date* is the date that the charge was added.
    - **Completion date**: The *Completion date* is the date that the core facility staff marks a charge as completed or confirmed.
      - The *Completion date* and *Purchase date* can be edited manually by core staff so they may differ from each other.
    - **Billing date**: The *Billing date* is the date the charge was included in a current billing event. Review billing event date to determine correct date range

- **Export**
  - Charts/tables as PDF
  - Source data as CSV/XLS = Mycores Usage Extract
  - Data from charts/tables below as XLS
  - Data from charts/tables below as CSV

- **Report Types**
  - Charges, Request, Events, Custom Forms
Resources

➢ **Refund requests** must be submitted by Core Admins: [Refund Request Form]

➢ **iLab Support Teams**- [Service Ticket Protocol]

➢ **Use the IOC form** to collect account information from other UC Campus customers: [IOC Request Form]

➢ **Upcoming training events**: [iLab Office Hours]

➢ **Help us spread the word** about Office Hours by posting a flyer in your core: [RRP Office Hours Flyer]
For further assistance please contact iLab@ucsf.edu

Quick Start Guides:

- [https://rrp.ucsf.edu/ilab-user-training](https://rrp.ucsf.edu/ilab-user-training)