

CSU iLab/CrossLab Integration Manual

Table of Contents:

[Table of Contents:](#)

[Overview](#)

[Logging into iLab:](#)

[Navigating iLab:](#)

[Invoices:](#)

[Managing Accounts in a Lab](#)

[How do I assign and manage Accounts?](#)

[How do I request a new Account within my lab?](#)

[FAQ's](#)

[CSU Billing Process](#)

Overview

The iLab/CSU Financial Integration allows PIs, Financial Managers, Researchers and Core Managers to ensure that they are using valid payment information (Account) at each step of the request and billing process for core facilities. PI's and/or lab managers assign Account to individuals who should be able to order services from CSU cores. Researchers can order services with Account, and core managers can bill for these services knowing that they are using valid Account. 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 Account and making any appropriate changes to labs.

Logging into iLab:

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



From Insight to Outcome

You are about to enter the private network of Agilent Technologies, Inc. Unauthorized entry and/or use of this system may subject you to both civil and criminal liability under applicable state and/or federal laws and regulation

Internal Colorado State University user :

Click [here](#) to login or register using your institute login and password.

Not a Colorado State University user?

Login using iLab credentials

[Learn more about iLab Operations Software](#)
 If you don't have an account, please [register](#) for an iLab account.

Please email ilab-support@agilent.com if you are experiencing problems with your username and password.

© Agilent Technologies, Inc. 2017

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

Authentication Required



eID Login

Log in to iLab Solutions Staging

eName:

Password:

Disable Single Sign-On for this session

Important!

Bookmarks

- b. If you do not have an iLab account, and you have a eID, 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: 📞 ★

© Agilent Technologies, Inc. 2017 [privacy policy \(pdf\)](#) | [security policy \(pdf\)](#)

- c. If you do not have a CSU login (external user) and need an iLab account, follow the link below and provide all details during the registration wizard.
 - d. <https://colostate.ilab.agilent.com/account/signup/258>
4. 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 "Getting started" section with a "Welcome to iLab!" message and a "Thank you for registering for an iLab account. Please use the information below to help you get started. Feel free to contact ilab-support@agilent.com with any questions." Below this, there is a "Getting started" section with a list of instructions: 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 an "info" button and a "help" button.

Navigating iLab:

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

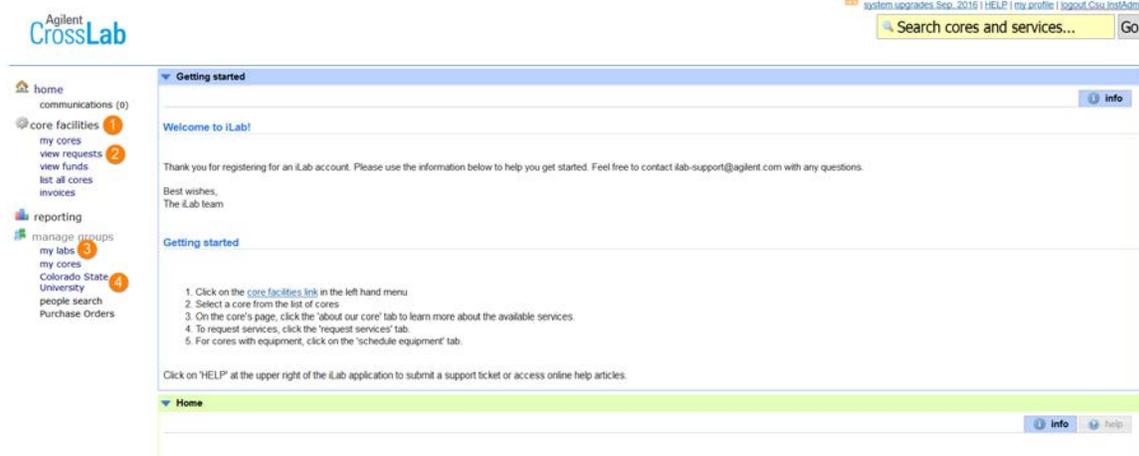


Image 1.1: Core Facilities:

- Click 'Core Facilities' to see any live CSU 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 an Account**

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: "Colorado State University":

- 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 an Account selected to charge the request against.
 - i. To update, simply click the \$ icon and select an Account. 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 Labs' to see a list of labs you manage.
2. Click the lab name to enter into the lab to adjust settings, members, Account assignments.

Prenni, Jessica (CSU) Lab

Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date	End Date	
Jessica Prenni	\$5,000.00		jessica.prenni@colostate.edu.ilabx.com				
Corey Broeckling	Lab default (\$500.00)		corey.broeckling@colostate.edu.ilabx.com				
Csu InstAdmin	Lab default (\$500.00)		csu.instadmin@ilabx.com				
Csu CoreAdmin	Lab default (\$500.00)		csu.coreadmin@ilabx.com				
Kimberly McCarthy	Lab default (\$500.00)		km.mccarthy@colostate.edu	970-402-0011			

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 Account(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 & Accounts' 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 Account(s) to the new researcher.

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.

The screenshot shows the 'Invoices' page in the Agilent CrossLab system. On the left is a navigation menu with categories like 'home', 'communications (0)', 'core facilities', 'reporting', and 'manage groups'. The main area displays a table of invoices. The table has columns: Created On, Core, Invoice Number, Lab, Owner, Payment Numbers, Price Types, Total Cost, Status, and Approval Status. A magnifying glass icon is highlighted on the right side of the table, with a callout box that says 'Click the Magnifying glass icon to view the invoice.' Another callout box on the left side of the filters says 'Use filters to sort invoices that display.'

Created On	Core	Invoice Number	Lab	Owner	Payment Numbers	Price Types	Total Cost	Status	Approval Status
Apr 27 '17	Proteomics Facility	PF-2212	Abt, Steven (CSU) Lab	Steven Abt	53	Internal	\$65.00	Not Yet Paid	not required
Apr 27 '17	Proteomics Facility	PF-2211	Akkina, Ramesh (CSU) Lab	Ramesh Akkina	53	Internal	\$38.00	Not Yet Paid	not required
Apr 17 '17	Flow Cytometry Facility	FCF-2125	Abt, Steven (CSU) Lab	Steven Abt	53	Internal	\$33.00	Not Yet Paid	not required
Apr 17 '17	Flow Cytometry Facility	FCF-2124	Akkina, Ramesh (CSU) Lab	Ramesh Akkina	53	Internal	\$54.00	Not Yet Paid	not required
Apr 13 '17	Flow Cytometry Facility	FCF-2122	Prenni, Jessica (CSU) Lab	Jessica Prenni	53	Internal	\$250.00	Not Yet Paid	not required
Apr 13 '17	Proteomics Facility	PF-2121	Prenni, Jessica (CSU) Lab	Jessica Prenni	53	Internal	\$138.00	Not Yet Paid	not required
Apr 10 '17	Flow Cytometry Facility	FCF-2099	Aloise-Young, Patricia (CSU) Lab	Patricia Aloise-Young	53	Internal	\$18.00	Not Yet Paid	not required
Apr 10 '17	Flow Cytometry Facility	FCF-2098	Andales, Allan	Allan Andales	53	Internal	\$76.48	Not Yet Paid	not required

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 Account:

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

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

Back to Core | Billing Event | Mark as paid | Hide details | Show details

Colorado State University

Invoice No. FCF-2124
 Invoice Date April 17, 2017
 Lab Akkina, Ramesh (CSU) Lab

From: Flow Cytometry Facility To: Akkina, Ramesh (CSU) Lab | Ramesh Akkina

[show additional contacts](#)

Invoice Total \$54.00

DATE	ITEM DESCRIPTION	PMT#	QTY	PPU	STATUS	TOTAL
Request: FCF-RA-9	Start: April					
(44510) April 17, 2017	Consultation/charge					
(44511) April 17, 2017	Buoccal Handi Consultation/Training Fee	Billing Initialized	53			\$21.00
(44512) April 17, 2017	BET Sample Buoccal Handling	Billing Initialized	53			\$29.00
	BET Sample Fee- Research Service	Billing Initialized	53			\$4.00
	Actual cost: \$54.00					

selected charge(s) total: \$0.00

Invoice total: \$54.00

Update payment info for selected (0) charges

Account Names 100.00 **Select Account Name...** total allocated

100.0%

split charge

make default for project?

payment notes

save cancel

1: Update payment info button
 2: Account Name dropdown
 3: total allocated field
 4: save button

Click 'save'

Managing Account(s) in a Lab

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

How do I Assign and manage Account?

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

The screenshot shows the Agilent CrossLab web interface. In the top right corner, there are links for 'system upgrades, Sep. 2016 | HELP | my profile | logout, Csu InstAdmin' and a search bar with the text 'Search cores and services...' and a 'Go!' button. The left sidebar contains a navigation menu with options: 'home', 'communications (0)', 'core facilities' (with sub-options: 'my cores', 'view requests', 'view funds', 'list all cores', 'invoices'), 'reporting', and 'manage groups' (with sub-options: 'my labs', 'my cores', 'Colorado State University', 'people search', 'Purchase Orders'). The 'my labs' option is highlighted. The main content area is titled 'Labs/Groups I Manage' and displays a list of labs, including '(CSU) Lab' with a timestamp '(2017 Mar 27 05:27 PM)'. Below this, there are sections for 'Core Facilities I Manage' (listing 'Flow Cytometry Facility' and 'Proteomics Facility') and 'Institutions I Manage' (listing 'Colorado State University').

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

Prenni, Jessica (CSU) Lab

The screenshot shows the 'Membership Requests & Account Names' section for the 'Prenni, Jessica (CSU) Lab'. The 'Membership Requests & Account Names' tab is selected, along with 'Members (5)', 'Budgets', 'Bulletin board (2)', and 'Group Settings'. Below this, there is a 'Membership Requests' section with a green checkmark and the text 'No Access Requests require approval'. The 'Manage Account Names' section has a note: 'Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.' Below this is a table with the following data:

Name	Default Account Name	53	53	53	53
Jessica Prenni	53	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Corey Broeckling	53	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Csu InstAdmin	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Csu CoreAdmin	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kimberly McCarthy	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Below the table, there are two links: 'Request access to additional Account Names' and 'Disable/Enable Account Names'. A callout box with an orange border and arrow points to the checkboxes in the table, containing the text: 'Select check boxes to assign Accounts to different lab members.'

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

1. If the Account 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 Account* section which appears below the fund grid.
3. Here you will see instructions on how the new Account needs to be entered.
4. Once approved the Account 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 Account Names

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

Additional text information here. (Help to request the non-sponsored fund)

★ Account Name Request

Your Account Name requests:

Account Name	Requested on	Status	Owned by	Resolved on	Resolved by	Notes by Account Manager	Archive request
13	Apr 07 '17	pending	Allan Andisles				

▶ Disable/Enable Account Names

© Agilent Technologies, Inc. 2017

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 account 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

Prenni, Jessica (CSU) Lab

Membership Requests & Account Names **Members (5)** Budgets Bulletin board (2) 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 \$ 500.0

Cost overage buffer \$ 100.0

save approval settings

Lab members and settings

Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date	End Date	
Jessica Prenni	\$5,000.00		jessica.prenni@colostate.edu.ilabx.com				👤 🗑️ ✖️
Corey Broeckling	Lab default (\$500.00)		corey.broeckling@colostate.edu.ilabx.com				👤 🗑️ ✖️
CSU InstAdmin	Lab default (\$500.00)		csu.instadmin@ilabx.com				👤 🗑️ ✖️
CSU CoreAdmin	Lab default (\$500.00)		csu.coreadmin@ilabx.com				👤 🗑️ ✖️
Kimberly McCarthy	Lab default (\$500.00)		kim.mccarthy@colostate.edu	970-402-0011			👤 🗑️ ✖️

Link existing user

Add an existing user

Invite additional members to this group

Start typing the name of the

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 Account(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

Prenni, Jessica (CSU) Lab

Membership Requests & Account Names | **Members (5)** | Budgets | Bulletin board (2) | 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: \$ 500.00 ⚠️
 Cost overage buffer: \$ 100.00

Lab members and settings

Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date	
Jessica Prenni	\$5,000.00		jessica.prenni@colostate.edu.ilabx.com			
Corey Broeckling	Lab default (\$500.00)		corey.broeckling@colostate.edu.ilabx.com			
CSU InstAdmin	Lab default (\$500.00)		csu.instadmin@ilabx.com			
CSU CoreAdmin	Lab default (\$500.00)		csu.coreadmin@ilabx.com			
Kimberly McCarthy	Lab default (\$500.00)		kim.mccarthy@colostate.edu	970-402-0011		

Add an existing user

Invite additional members to this group
 Start typing the name of the

Q: How do I split charges on an invoice?

A: Follow these steps:

1. Locate the invoice:

- *Log in 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*

home | communications (0) | core facilities | my cores | view requests | view funds | list all cores | invoices | reporting | manage groups | my labs | my cores | Colorado State University | people search | Purchase Orders

Invoices

Hide Filters

Keywords: Go

Displaying 11 out of 11 result(s) (Page 1 of 1)

Created On	Core	Invoice Number	Lab	Owner	Payment Numbers	Price Types	Total Cost	Status	Approval Status	
Apr 27 '17	Proteomics Facility	PF-2212	Abt, Steven (CSU) Lab	Steven Abt	53	Internal	\$65.00	Not Yet Paid	not required	
Apr 27 '17	Proteomics Facility	PF-2211	Akkina, Ramesh (CSU) Lab	Ramesh Akkina	53	Internal	\$38.00	Not Yet Paid	not required	
Apr 17 '17	Flow Cytometry Facility	FCF-2125	Abt, Steven (CSU) Lab	Steven Abt	53	Internal	\$33.00	Not Yet Paid	not required	
Apr 17 '17	Flow Cytometry Facility	FCF-2124	Akkina, Ramesh (CSU) Lab	Ramesh Akkina	53	Internal	\$54.00	Not Yet Paid	not required	
Apr 13 '17	Flow Cytometry Facility	FCF-2122	Prenni, Jessica (CSU) Lab	Jessica Prenni	53	Internal	\$250.00	Not Yet Paid	not required	
Apr 13 '17	Proteomics Facility	PF-2121	Prenni, Jessica (CSU) Lab	Jessica Prenni	53	Internal	\$138.00	Not Yet Paid	not required	
Apr 10 '17	Flow Cytometry Facility	FCF-2099	Alose-Young, Patricia (CSU) Lab	Patricia Alose-Young	53	Internal	\$18.00	Not Yet Paid	not required	
Apr 10 '17	Flow Cytometry Facility	FCF-2098	Andales, Allan	Allan Andales	53	Internal	\$76.48	Not Yet Paid	not required	

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'

The screenshot displays the 'Invoice Details' modal in the Agilent CrossLab system. The modal is overlaid on an invoice summary page. The invoice total is \$54.00. The modal shows a table of charges with columns for DATE, ITEM DESCRIPTION, PMT.#, QTY, PPU, STATUS, and TOTAL. Three charges are listed: Consultation/Training Fee (\$21.00), Buccal Handling (\$29.00), and BET Sample Fee- Research Service (\$4.00). A 'split charge' modal is open, allowing the user to update payment info for selected charges. The 'Account Names' field is set to 100.0%, and the 'total allocated' is also 100.0%. A 'split charge' button is highlighted with an orange box, and a 'save' button is also highlighted. The 'make default for project?' checkbox is checked. The 'payment notes' field is empty. The 'Send Payment Reminder?' checkbox is unchecked.

DATE	ITEM DESCRIPTION	PMT.#	QTY	PPU	STATUS	TOTAL
(44510) April 17, 2017	Consultation/Training Fee	Billing Initialized	53			\$21.00
(44511) April 17, 2017	Buccal Handling	Billing Initialized	53			\$29.00
(44512) April 17, 2017	BET Sample Fee- Research Service	Billing Initialized	53			\$4.00

Actual cost: \$54.00

selected charge(s) total: \$0.00

Invoice total: \$54.00

Account Names: 1 100.0% Select Account Name...

total allocated: 100.0%

make default for project?

payment notes

split charge

save cancel

Send Payment Reminder?

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 Account.
- Click 'Add Split'
- Repeat steps 4-5 until splits total 100%.
- Click 'Save'