Agilent CrossLab
From Insight to Outcome

CSU iLab/CrossLab Integration Manual

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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.

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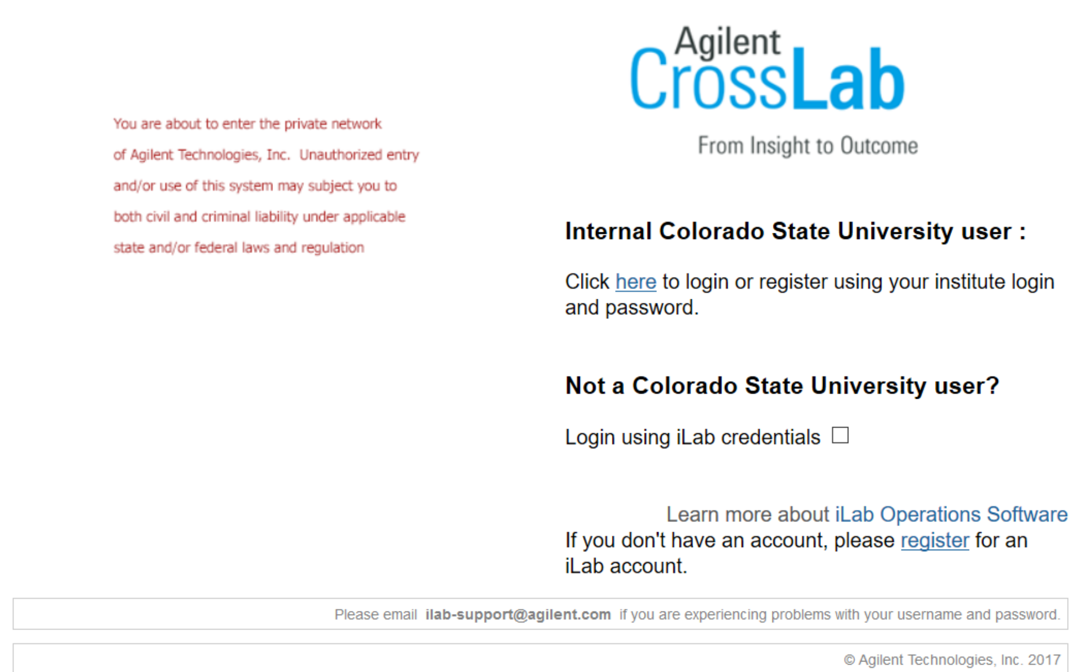
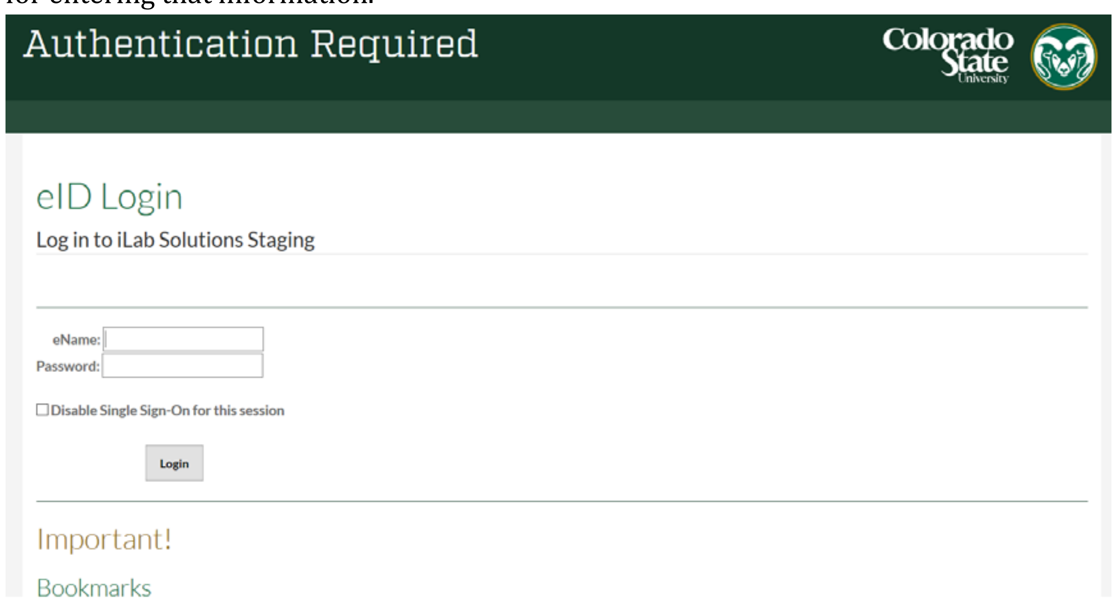
Logging into iLab:

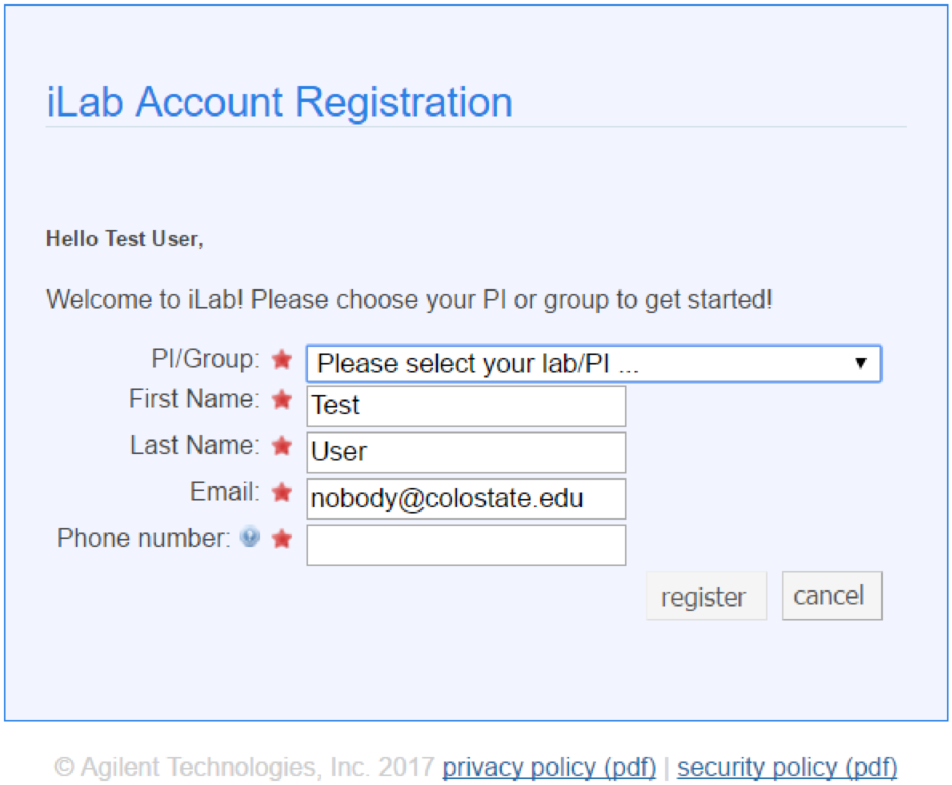
1. Type the following URL into your browser: https://colostate.ilab.agilent.com
2. Bookmark this URL.
3. Once on the iLab login page, login or register.



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



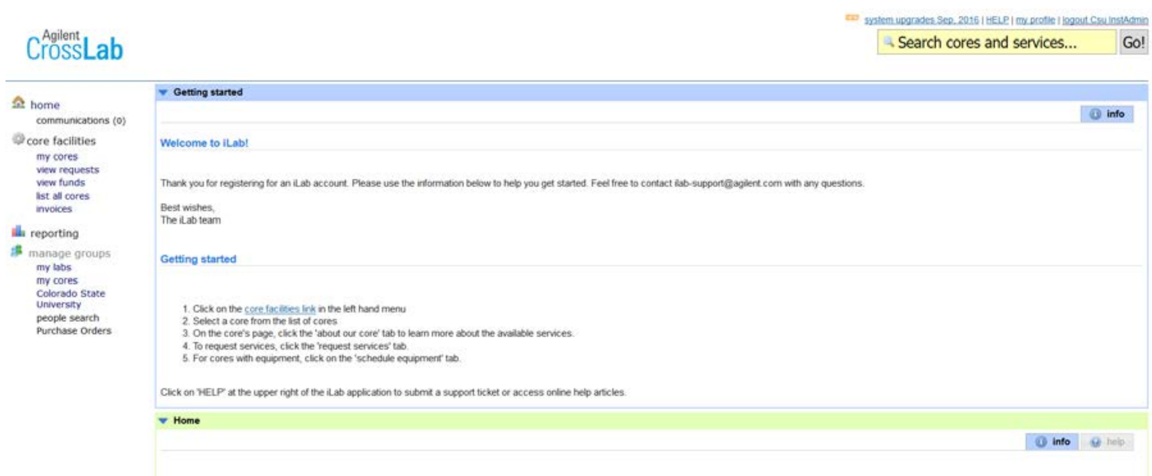
b. If you do not have an iLab account, and you have a eID, once you authenticate you will be directed to a registration page. You will need to select your PI and a request will be sent to your PI to approve your request.



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!



Navigating iLab:

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

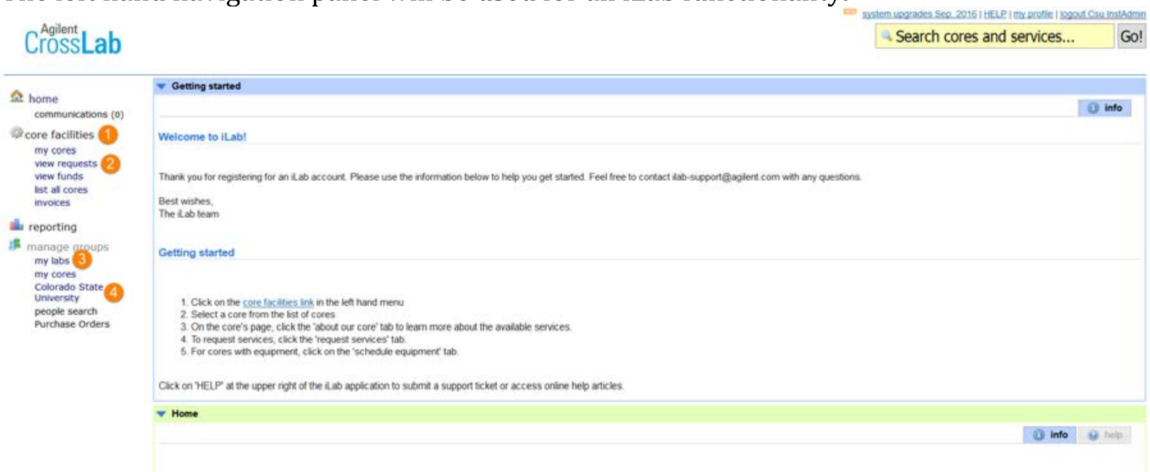


Image 1.1: **Core Facilities:**

- 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

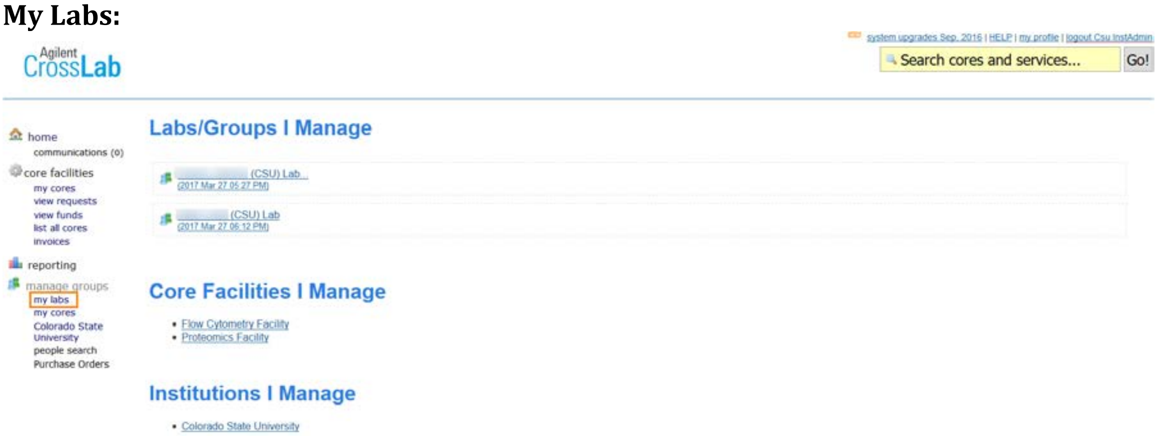
View Requests:

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.

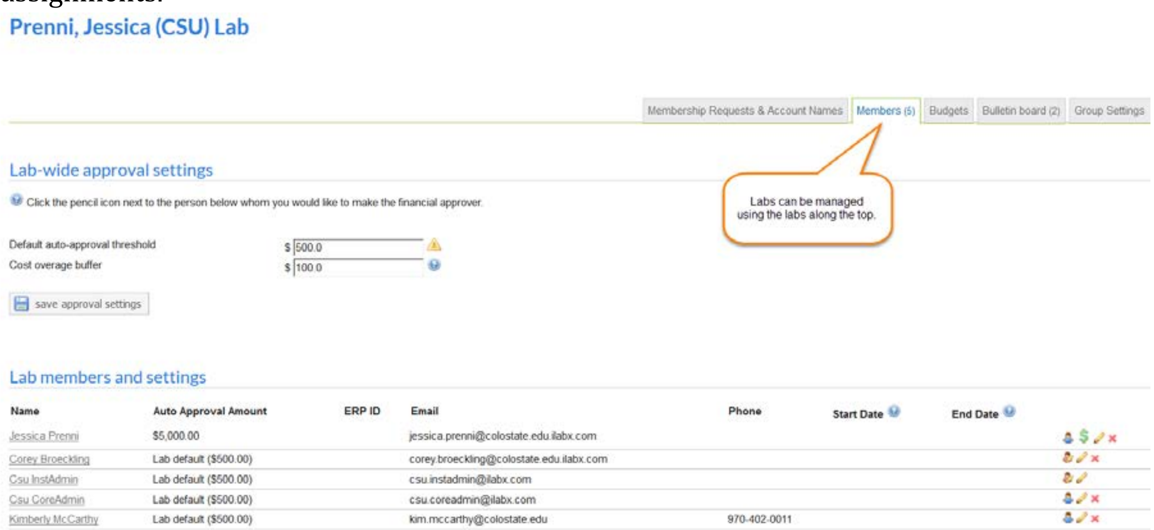
    c. **Processing and Recently Completed:** Displays all current or recently finished request from any researcher within your department(s).

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.



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.

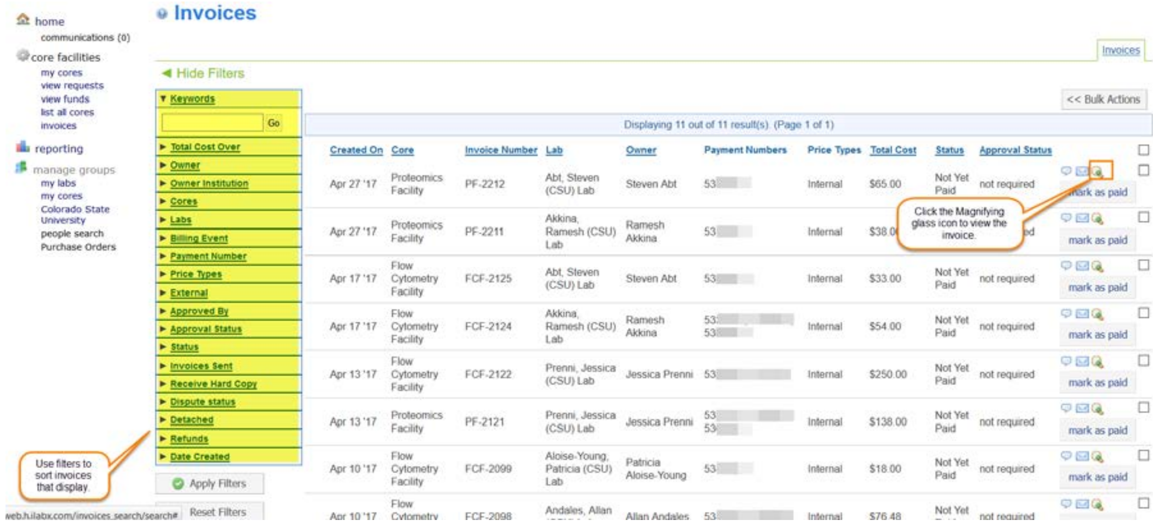
   Login to iLab → Click on ‘my labs’ → click the lab → Click ‘Membership Requests & Accounts’ this will show any pending approvals → approve the access request, or if the researcher selected the incorrect lab use ‘change lab’ to update their membership and then ‘approve’.

   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.



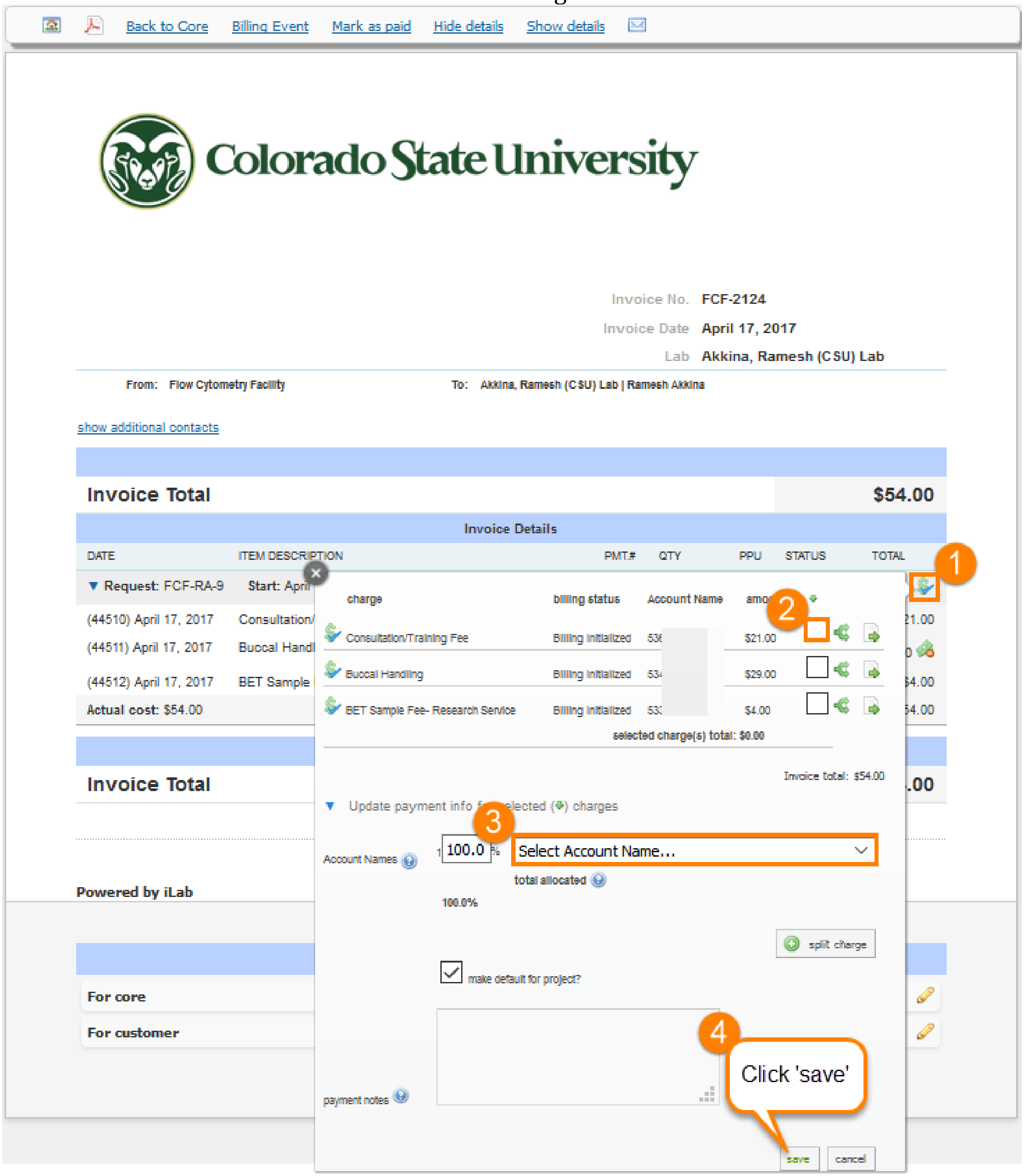
To View an Invoice:

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.

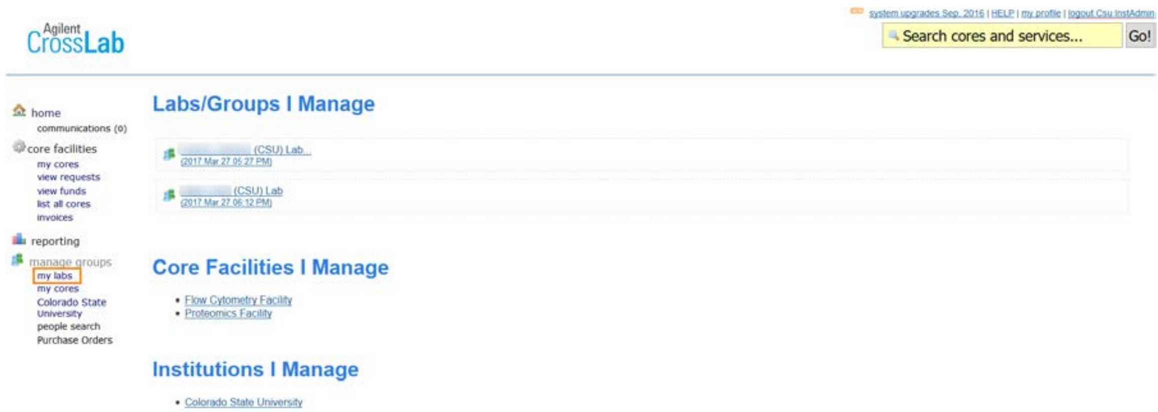


Managing Account(s) in a Lab

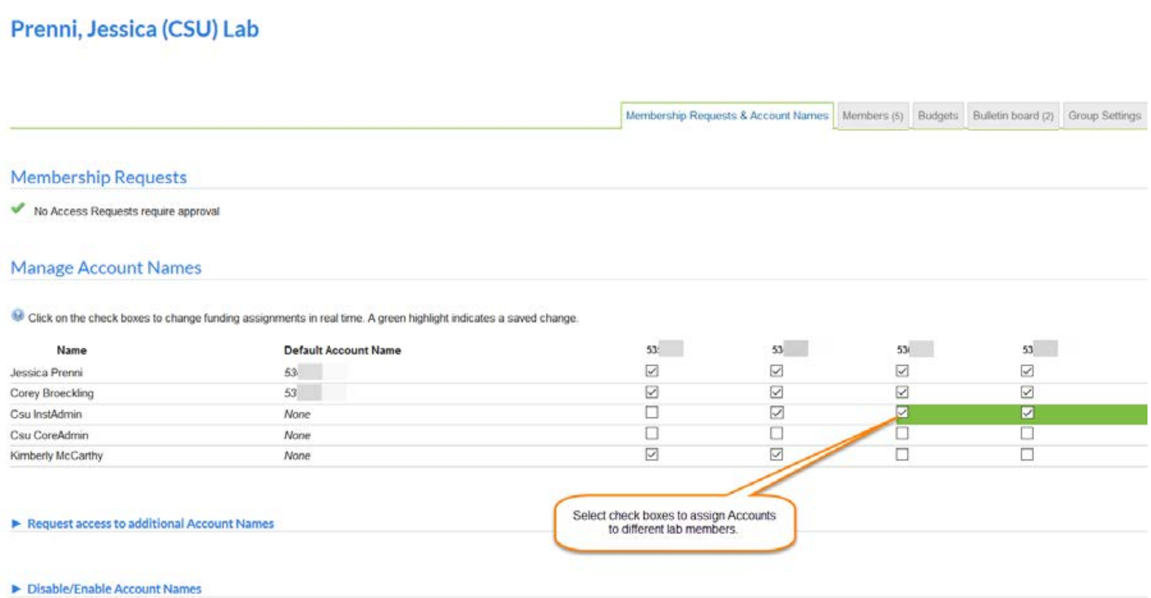
Account(s)are used to create valid charges in iLab using valid information sourced from CSU. CSU allows any PI or lab manager to request non-sponsored funds within their labs.

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.

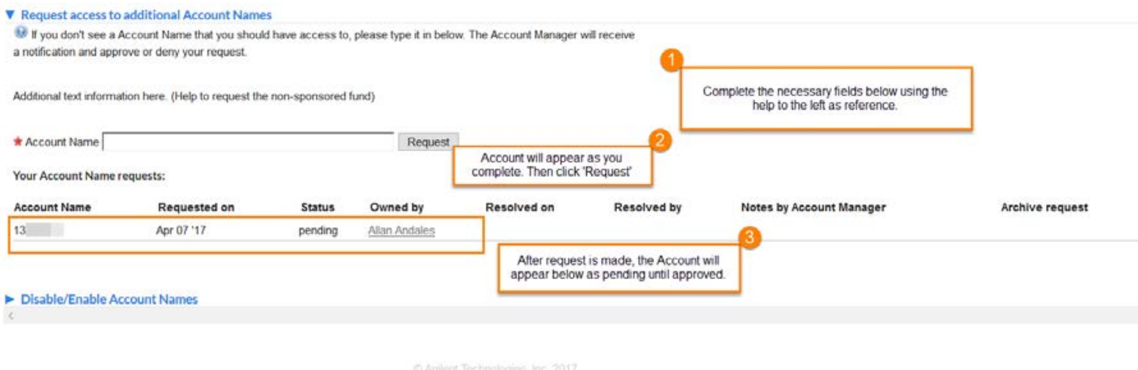


2. On the lab's page, click the *Membership Requests & Account* tab to expand this section.
3. Click on the appropriate check boxes to provide the researcher's access to Account(s). Assign Account(s)for each researcher on the list, when the box turns green it means the Account information has been applied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



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



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.

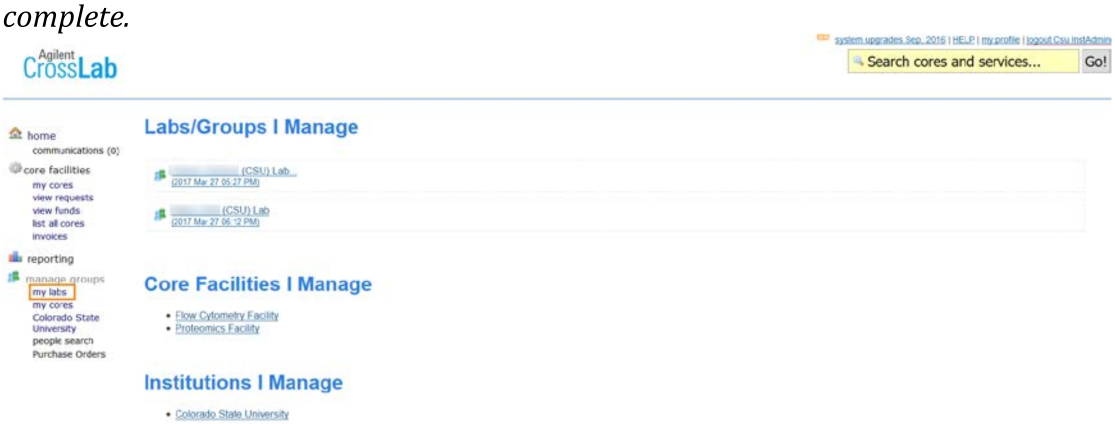


Image 1.1: Click the name of the lab that needs a new member added
Image 2 - Lab Page

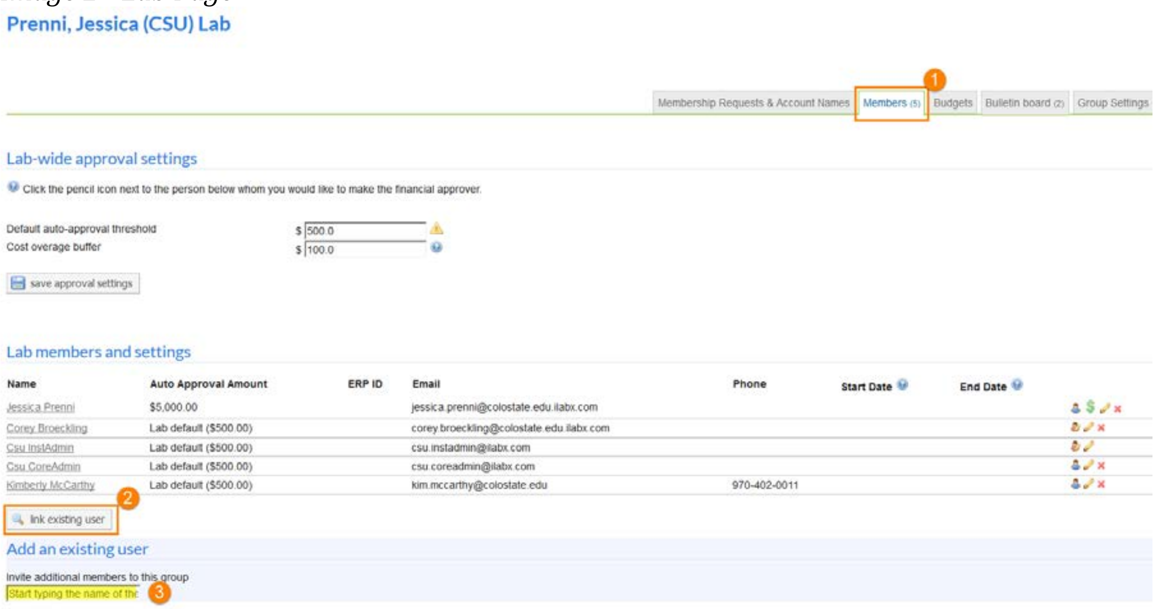


Image 2.1: Click Link existing user. Then use the search box to type the name of the member to add. They must be registered to locate them in the search
Be sure to give them access to Account(s)after inviting them to the lab.

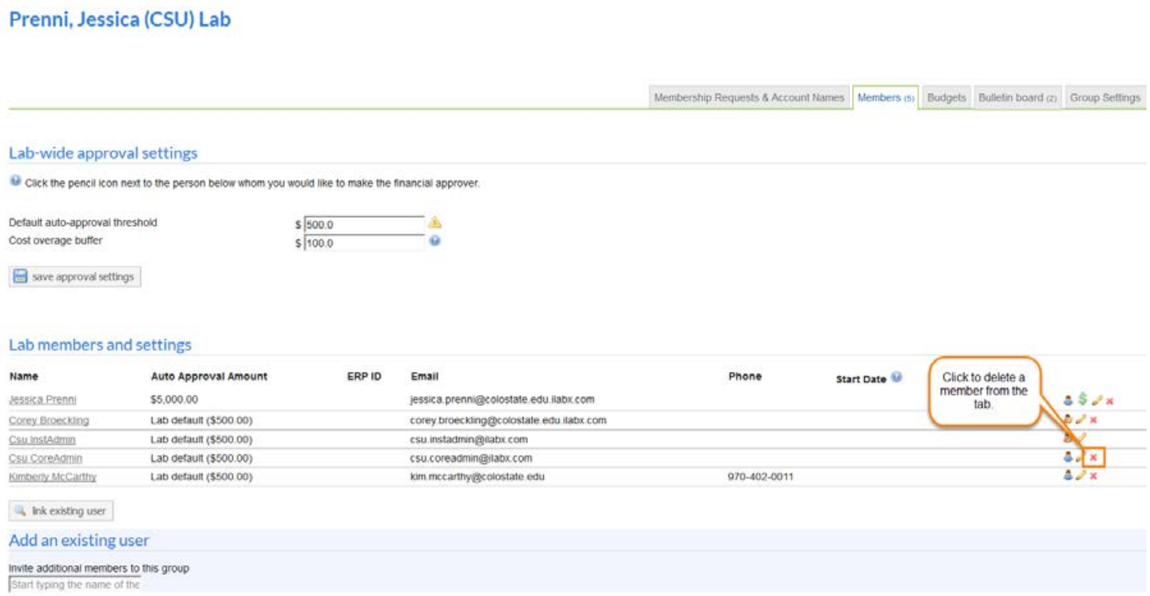
Q: Someone has left our Lab, how do I delete them from the lab?

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.*

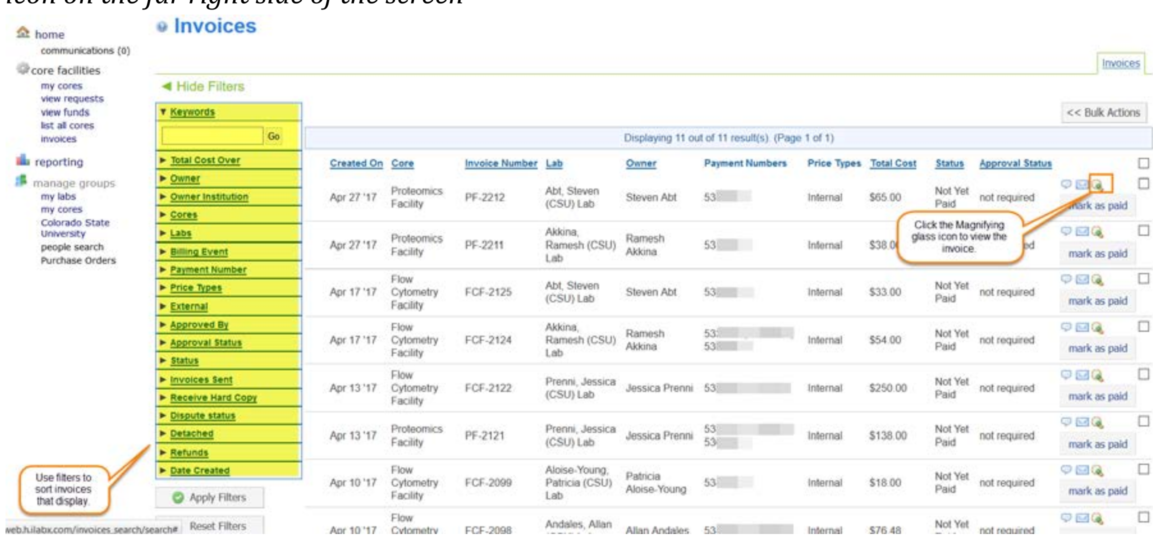
Alternately, you may click on the yellow pencil, enter an expiration date for your lab member and click save.

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*



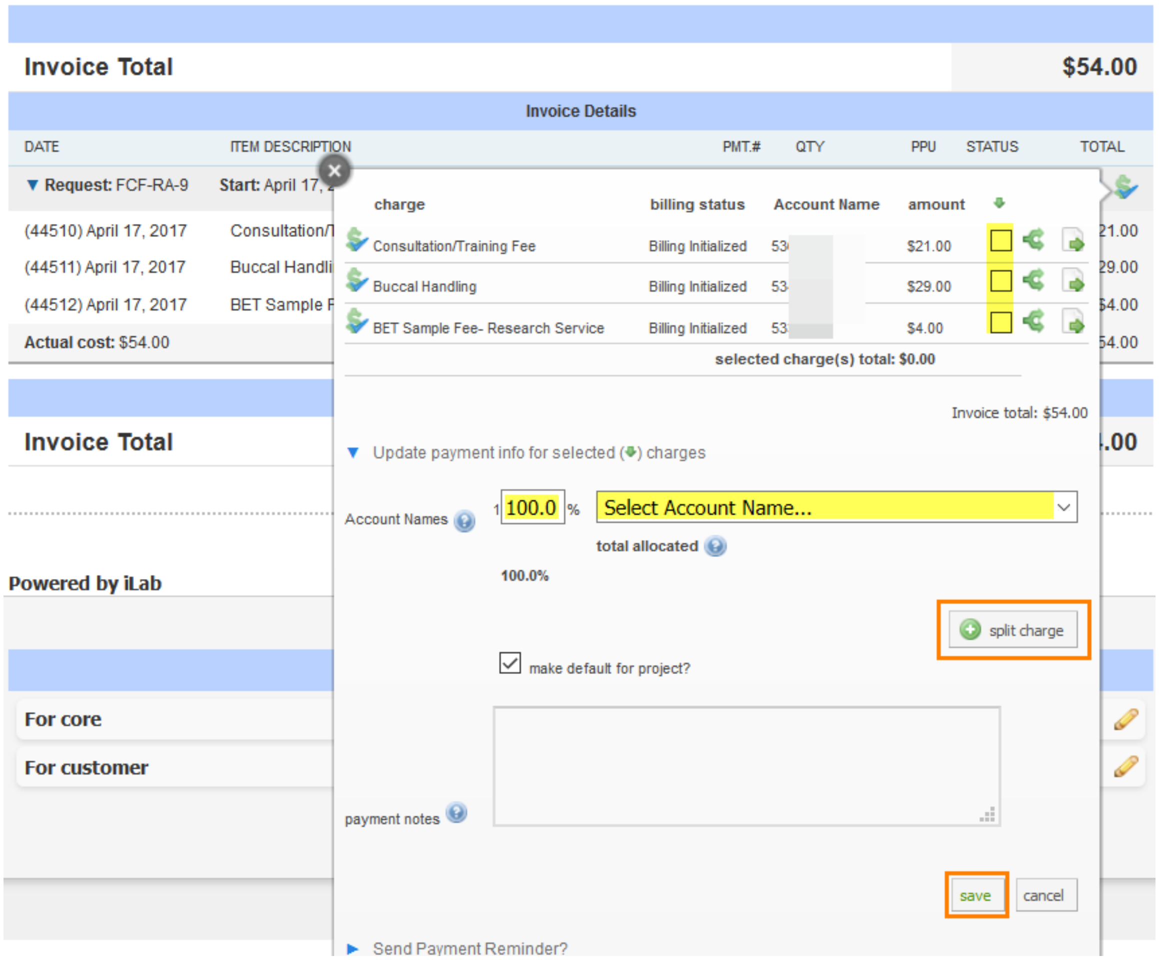
Q: How do I split charges on an invoice?
A: *Follow these steps:*

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*



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'*



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'*