

Johns Hopkins University - Financial Administrator Manual for iLab

Starting on May 9th, 2016, Johns Hopkins University started using iLab Solutions' Core Facility Management software (an online system to streamline the process of ordering and billing for core service requests.)

Please find below instructions on how to use the system and to learn about your specific responsibilities.

Logging in:

1. Go to johnshopkins.corefacilities.org
2. Click the "login" button in the upper right-hand corner of the page
3. Proceed by logging in with your JHED ID and password
4. [If you are taken to a registration page, please contact support@ilabsolutions.com]
5. 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

Responsibilities in iLab:

As a Principal Investigator (or, if delegated, a Lab Manager), you have a few new responsibilities to enable your researchers to order services from the cores and make equipment reservations. Specifically,

- **Accepting users into your lab (see item 1)**
- **Assigning Cost Objects to lab members (see ite**

The screenshot displays the iLab interface for a JHU Lab. The left-hand navigation menu includes options like 'home', 'communications (0)', 'core facilities', 'my reservations', 'view requests', 'view funds', 'list all cores', 'invoices', 'reporting', 'manage groups', and 'my labs'. The 'my labs' option is circled in orange, with a callout box stating 'Access your lab page from here'. The top navigation bar features 'Membership Requests & Cost Objects' (circled in orange with an arrow), 'bulletin board (0)', and 'Group Settings'. The main content area is divided into two sections: 'Membership Requests' and 'Manage Cost Objects'. The 'Membership Requests' section shows a table with columns for 'Date', 'Name', 'Email', and 'Actions'. Two requests are listed, both dated 'May 09 '16'. Each request has 'Accept' and 'Reject' buttons. A callout box explains: '1. Membership Requests: Accept/reject lab membership requests. Registered users can also be added directly from the Members' tab.' The 'Manage Cost Objects' section includes a warning: '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 columns for 'Name' and 'Default Cost Object' (00, 0276 008000, 00 0753 0080, 54 0080, 25 00, 1632 008000, 00 3856 008, 00 3860 00800, 4 00, 85, 003866 0, 04089 00, 13 0080, 17 00, 8501 008, 50). The first row is highlighted in orange, and the rest are in red. A callout box explains: '2. Cost Object Assignment: Check the boxes in the grid to provide Cost Object (Internal Order & Cost Center) access to lab members.' Another callout box notes: 'Cost Objects shown in orange will expire within 30 days. Cost Objects shown in red are expired.'

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- **Requesting access to additional Cost Objects (see item 3)**

- Managing lab members (see items 4 and 5)

Request access to additional Cost Objects

If you don't see a Cost Object that you should have access to, please type it in below. The Institution Administrator will receive a notification and approve or deny your request.

To request access to additional Cost Objects, enter the Cost Object in the field below and click "Request." Your request will be submitted to the SAP designated Approver. If approved, you will receive a notification and the Cost Object will be displayed in the above Cost Object grid.

Please enter either your 10-digit cost center or the 8-digit internal order preceded by two zeros 00. For example, for a cost center you would enter 1000008002 and for an internal order you would enter 0080001111.

★ Cost Object Request

3. Additional Cost Object Access:
Request access to additional cost objects. The request will be reviewed by the Cost Object Owner/Approver and approved or rejected.

If approved, it will be displayed in the Cost Object grid for assignment to lab members.

Your Cost Object requests:

Cost Object	Requested on	Status	Owned by	Resolved on	Resolved by	Notes by Institution Administrator	Archive request
11377	Apr 06 '16	approved		Apr 09 '16			
0000000	Mar 15 '16	approved		Mar 15 '16			
0000004	Mar 15 '16	rejected		Mar 15 '16		No spending being allowed on this Cost Object.	
11446	Mar 14 '16	approved		Mar 14 '16		Example note provided by cost object approver.	
0008002	Mar 14 '16	approved		Mar 15 '16			

(JHU) Lab

Membership Requests & Cost Objects Members (6) Group Setting

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 \$ 200
 Cost coverage buffer \$ 100

save approval settings

4. Set Auto Approval Thresholds:
Set the amount above which new requests require financial approval from authorized lab personnel. This is defaulted at the lab-level, or can be set at the member-level.

5. Manage Lab Members:
Use "x" to remove a member from the lab. Use the pencil icon to edit membership levels of the lab members. A "manager" can provide financial approval on requests. All members who should receive approval emails need to be listed as a "financial contact."

Lab members and settings

Name	Auto Approval Amount	Email	Phone	Start Date	End Date	
	Lab default (\$200.00)					
	Lab default (\$200.00)					
	Lab default (\$200.00)					
	Lab default (\$200.00)					
	Lab default (\$200.00)					
	Lab default (\$200.00)					

- Approving service requests and reviewing/providing payment information (see items 6 and 7)

home communications core facilities **Service Requests Awaiting Approval** reporting manage groups my labs people search

Access all requests that require financial approval or payment information. **Awaiting Approval** Processing and Recently Completed All requests

Show Filters

date	for	service id	status	cost
May 09 (May 09 2018)	(JHU) Lab	SKCCCHIC(T)-GM-26	Waiting for Financial Approval	\$4,210.00 (\$4,210.00)

Approve Deny

6. Financial Approval: Approve or deny financial approval for requests awaiting approval

7. Payment Information: Review or assign payment information for the request

If you would prefer to delegate these notifications and approvals to specific member(s) of your lab, please email support@ilabsolutions.com with their name and email.

Additional help

More detailed instructions are available in the 'Lab Administrators' section on our [helpsite](#). For any questions not addressed, click on the "HELP" link in the upper right hand corner to submit a help ticket, or contact support@ilabsolutions.com.