GLADSTONE INSTITUTES | STEM CELL CORE
GLADSTONE CORE SERVICES

iLAB Use for Stem Cell Core	SOP Number:
	Effective Date: 14Sep17
	Written/Revised By: Wendy Runyon

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Version Number	Summary of Changes	Revised by/Date
01	Original Document	Wendy Runyon 14Sep17

1. PURPOSE

To describe the process for using the iLAB program for the Stem Cell Core.

2. SCOPE

This procedure applies to the Agilent CrossLab (iLAB) program for use in the Stem Cell Core.

3. ADDING NEW USERS TO iLAB

3.1. Send email to support@ilabsolutions.com:

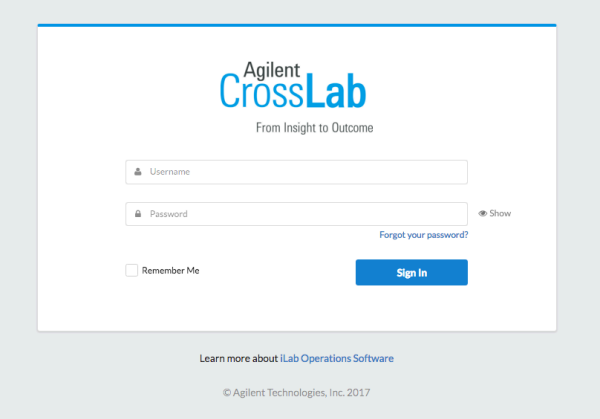
Hi iLAB,
Please create a new iLAB account for the below user.

First Name:
Last Name:
Email:
PI:
Lab:

3.2. You will receive an email with a new ticket confirmation. When the account is created, you will receive another email stating the account has been created. The new user will receive a welcome email with instructions to set up their account and password.

4. LOG IN TO iLAB

4.1. Go to https://my.ilabsolutions.com/account/login to log in to your account.



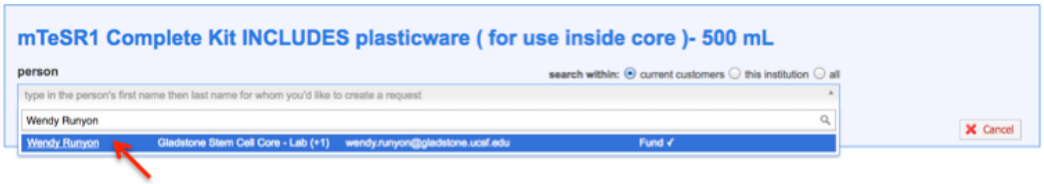
4.2. Sign in using the username and password associated with your account.

5. SUBMITTING/DELETING A REQUEST

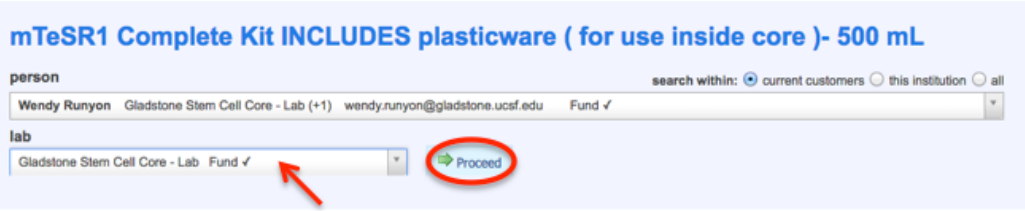
5.1. Under the "Request Services" tab, click on the product type being requested.

5.2. In the drop down list, select the product being requested. Click the "Initiate Request" button.

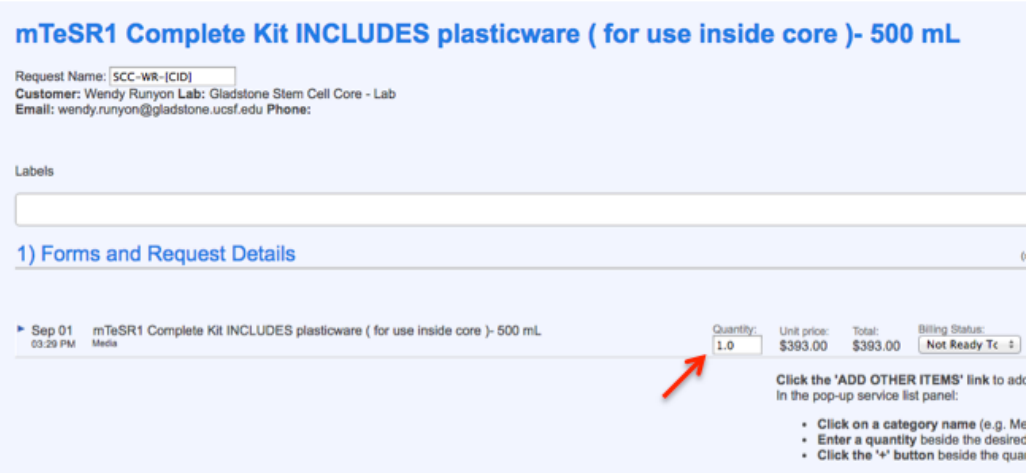
5.3. Type your name in the box labeled "person" and select your name from the dropdown menu that appears.



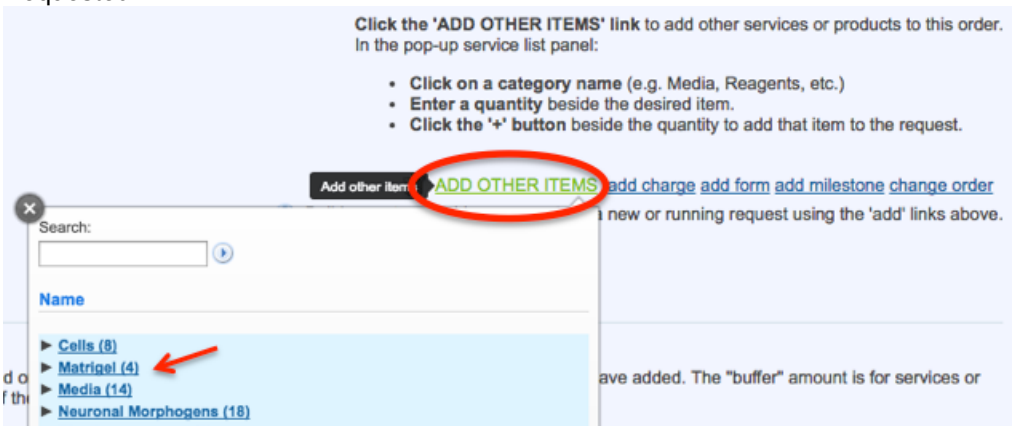
5.4. Select the lab to be billed from the dropdown menu labeled "lab". Click on "Proceed".



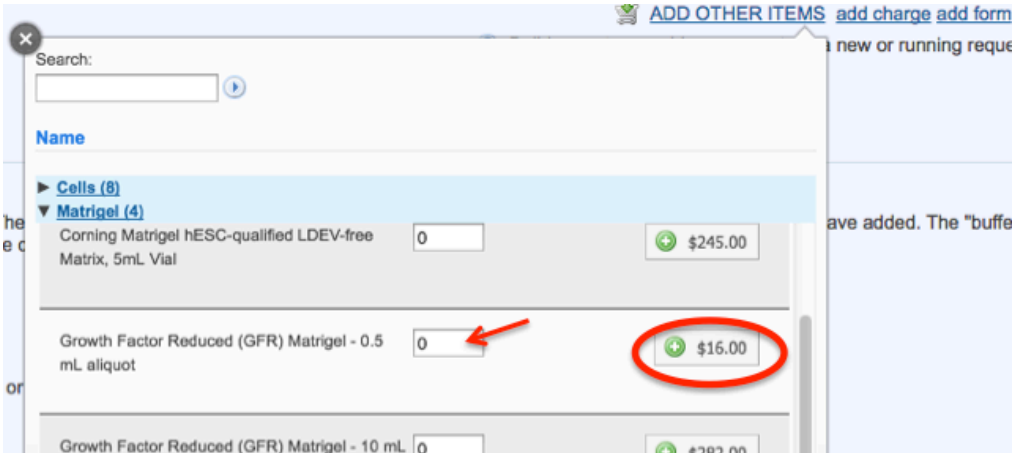
5.5. Type the quantity needed in the box labeled “Quantity”.



5.6. To request more than one item, click on “Add Other Items”. Select the product type being requested.



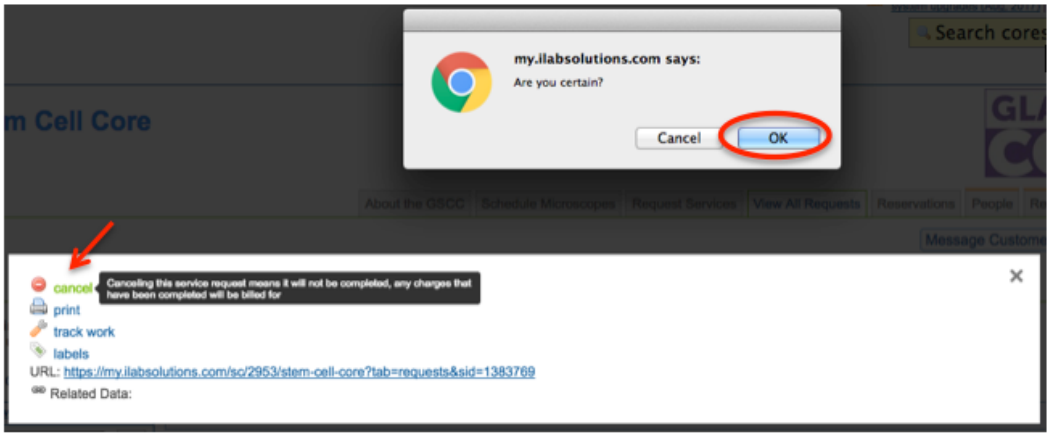
5.7. In the drop down list, enter the quantity needed of the item(s) you are requesting. Click on the button with the “+” symbol and price to the right of the item.



5.8. Once all items have been added to the request, select the Index Code for billing in the "Payment Information" section. Click on "submit request to researcher".

5.9. To delete an iLAB request that has not been processed, click on the icon of a pencil to the right of the order.

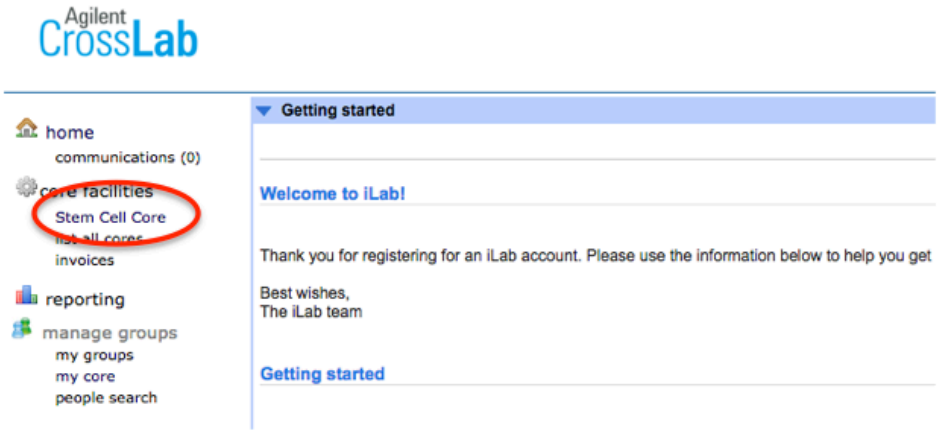
5.10. In the window that appears, click on "Cancel". A pop-up window will appear. Click "OK" to delete the order.



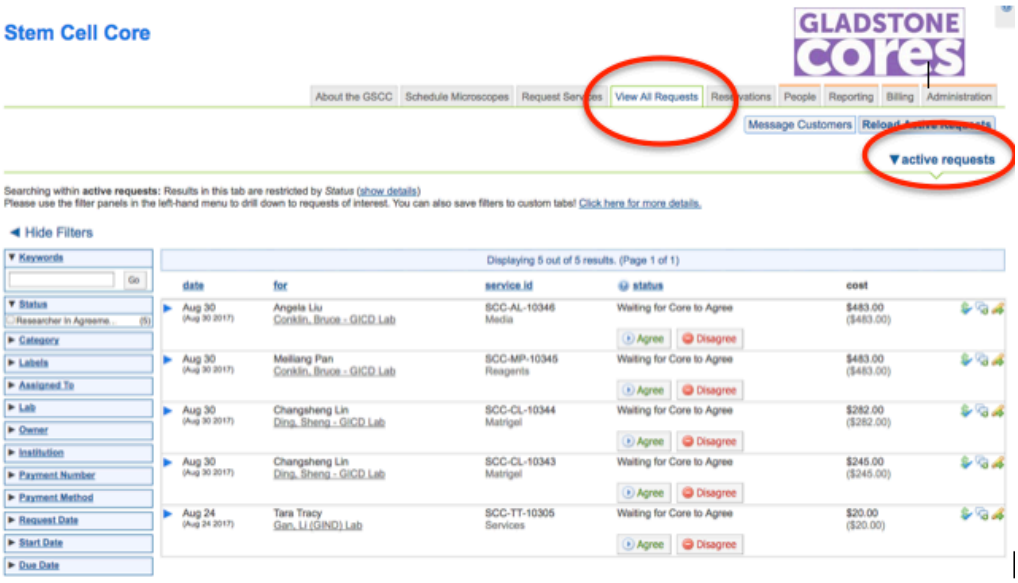
6. FULFILLING REQUESTS

Note: iLAB orders are processed on Monday, Wednesday, and Friday after 10am. Any orders placed after 10am will be processed on the following iLAB day.

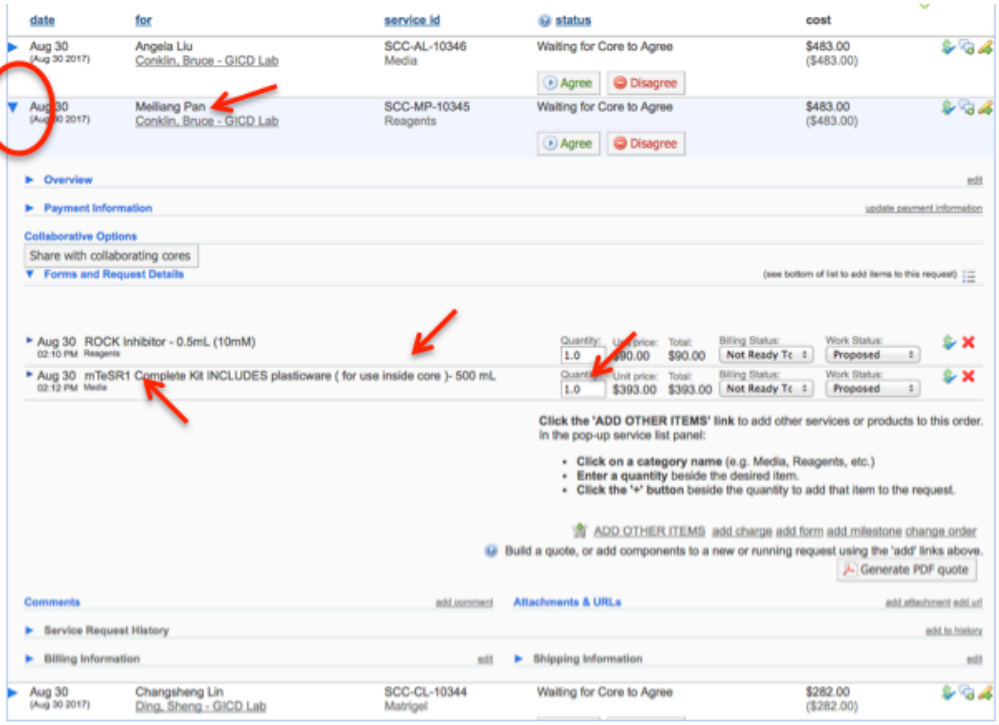
6.1. Click on “Stem Cell Core” link in the left hand menu.



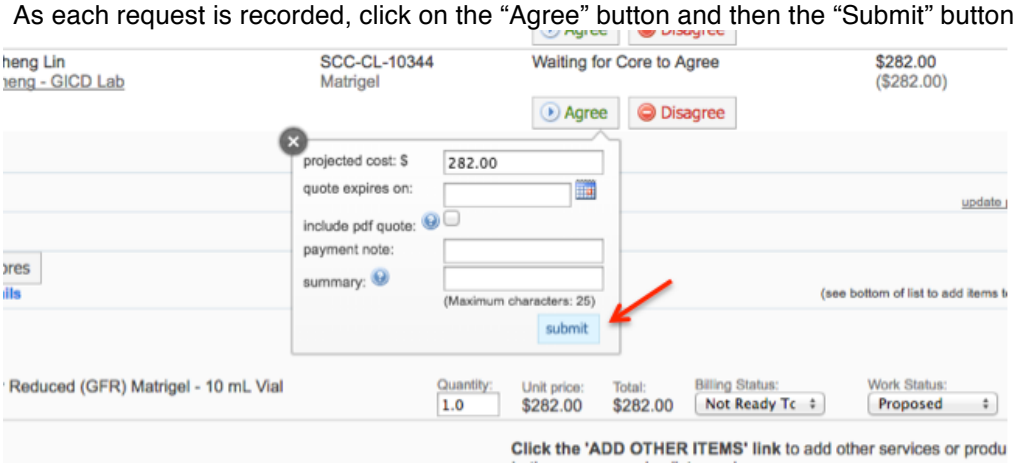
6.2. Click on the “View all Requests” tab and filter by “active requests”. You will now see a list of all active requests with the newest requests at the top.



6.3. Expand each request by clicking on the blue arrow. Using the Stem Cell Core Daily Activity sheet, record today’s date, name of requestor, product, and quantity ordered. Make sure to note in the product section if the order is for material outside the core.

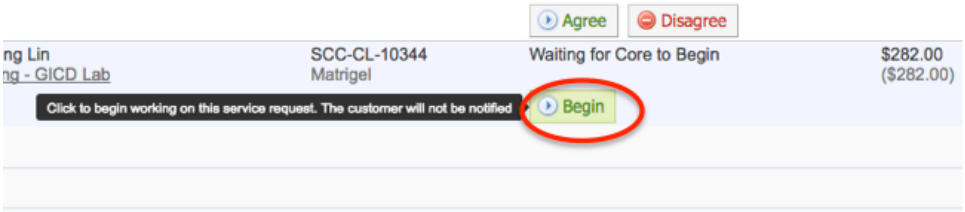


6.4. As each request is recorded, click on the "Agree" button and then the "Submit" button.



6.5. Click on the "Begin" button. The button will then say "Complete". Do not click on the "Complete" button until the order has been fulfilled, as this will notify the user via email that their order is ready for pickup.

For some requests, a "Complete" button will not appear and there will be a note stating "Waiting for Financial Approval". This will be dealt with after the orders have been fulfilled.



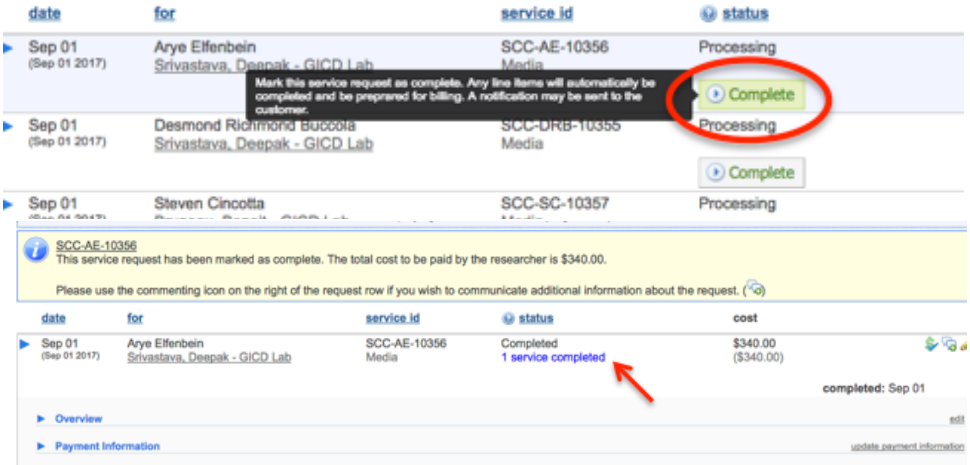
6.6. After recording all the active requests, collect the materials. Items stored at -20°C and -80°C should be placed on dry ice.

6.7. After the materials have been collected, attach the appropriately colored plasticware stickers to the bottles stored at 4°C. Refer to the Plasticware document on Google Drive to determine the appropriate sticker color.

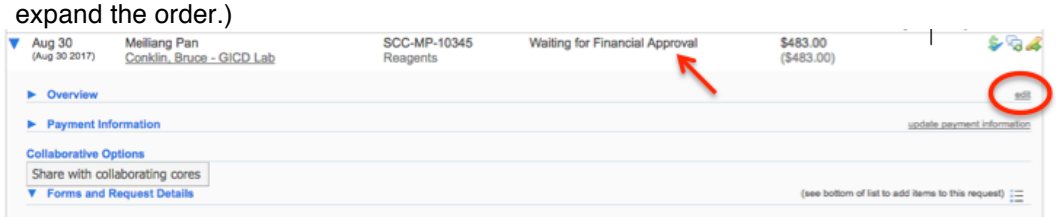
https://docs.google.com/document/d/1FTAJErpQmPlRzOTQlszccuS9GvezUAZAnBgxFOOUZVs/edit?ts=59a06f5d

6.8. Place the items on a cart in the stem cell core hallway along with the Stem Cell Core Daily Activity sheet and a pen. Users will initial next to their items after picking them up.

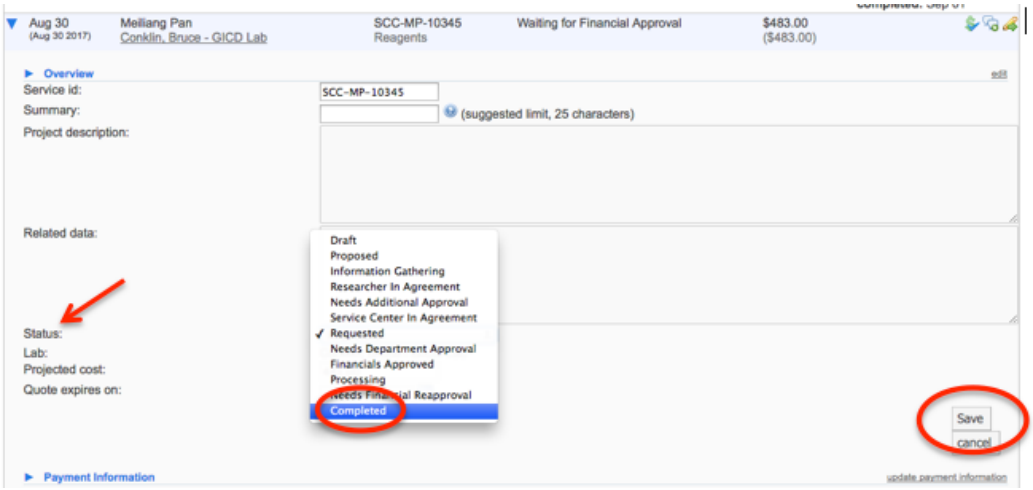
6.9. Go back to the iLAB program under "View All Requests" and filter by "active requests". Click the "Complete" button for all fulfilled orders. The status should now say "Completed".



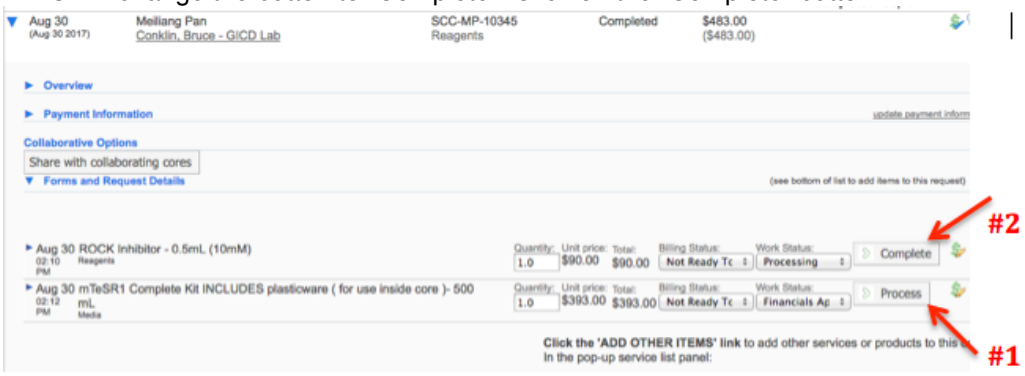
6.10. Some requests will state "Waiting for Financial Approval". To complete these orders click on the "edit" button under the expanded order. (Click on the blue arrow to the left to expand the order.)



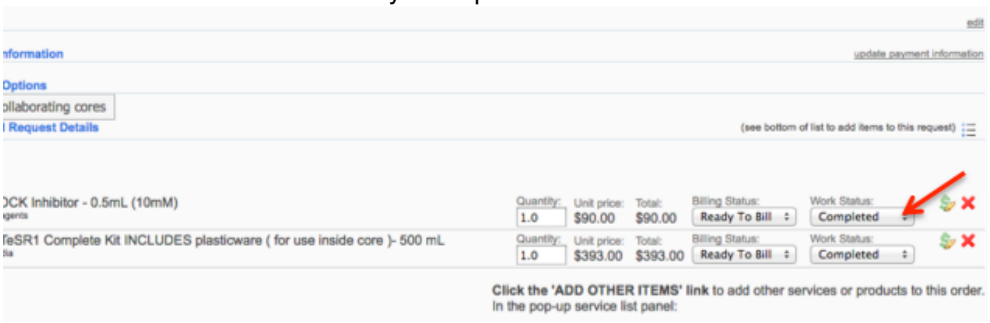
6.11. In the "Overview" section, change the status to "Completed". Then click the "Save" button.



6.12. In the "Forms and Request Details" section, click on the "Process" button for each item. This will change the button to "Complete". Click on the "Complete" button.

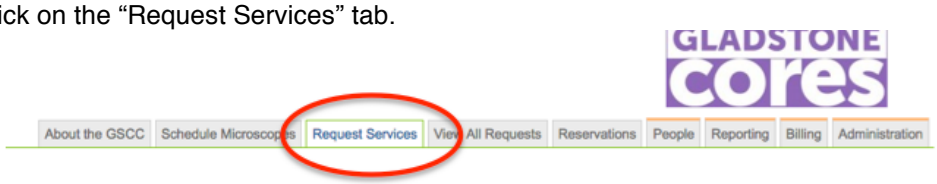


6.13. The work status should now say "Completed".

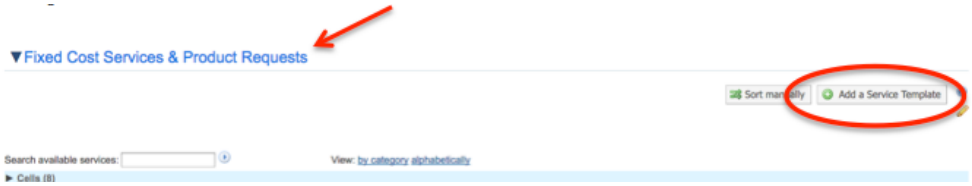


7. ADDING ITEMS

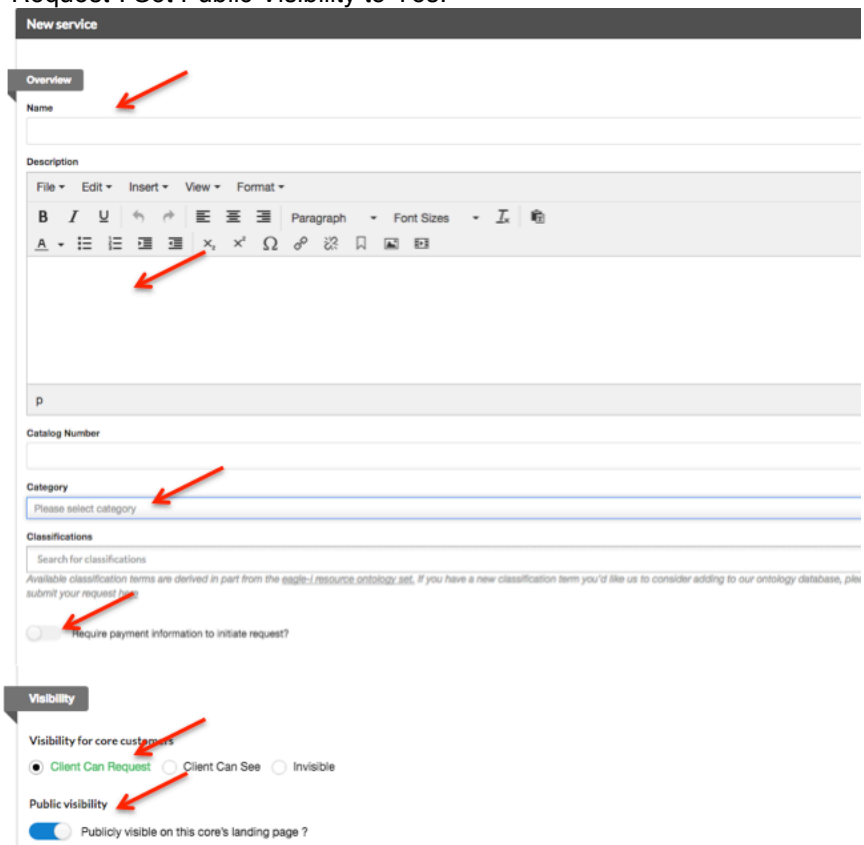
7.1. Click on the "Request Services" tab.



7.2. Under “Fixed Cost Services & Product Requests” click on the “Add a Service Template” button.

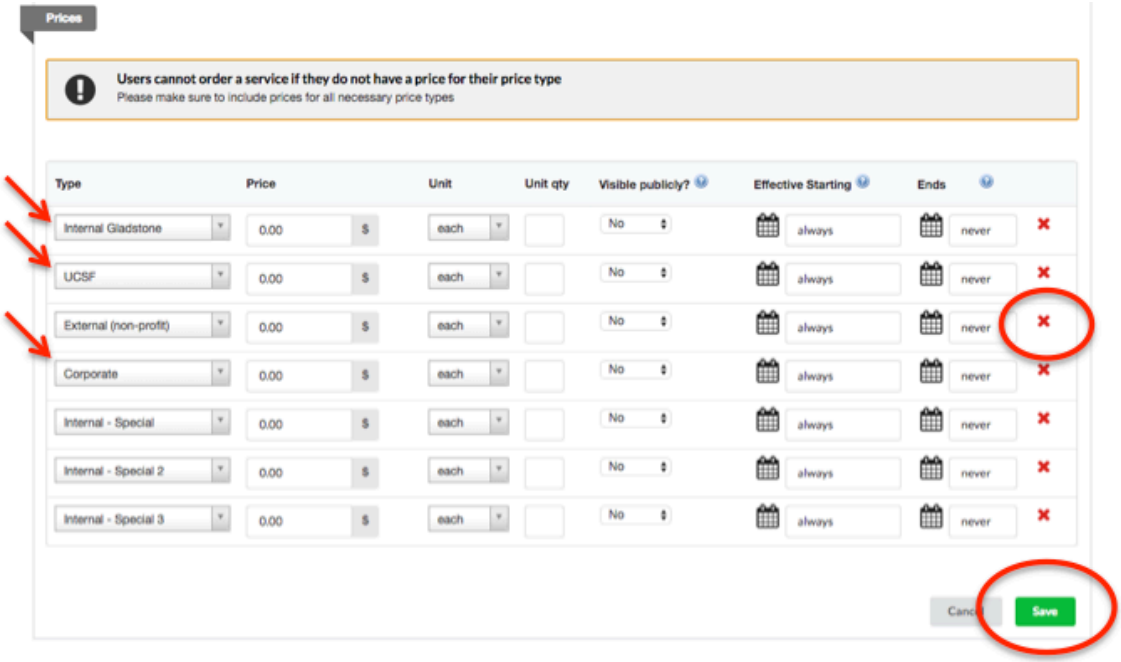


7.3. Fill out the template. Enter product name and description. In the description, add the vendor information and catalog number. Select a category from the drop down list. Set “Require payment information to initiate request” to Yes. Set the visibility to “Client Can Request”. Set Public Visibility to Yes.



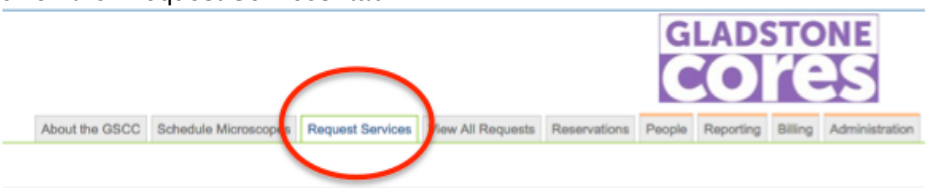
7.4. Continue filling out the template. Do not make any changes in the “Custom Billing Fields”, “Custom Forms to Include”, or “Service Assignees” sections. Set the prices for Internal Gladstone, UCSF, and Corporate. Delete the other pricing sections using the red X’s.

Click the “Save” button to add the item.

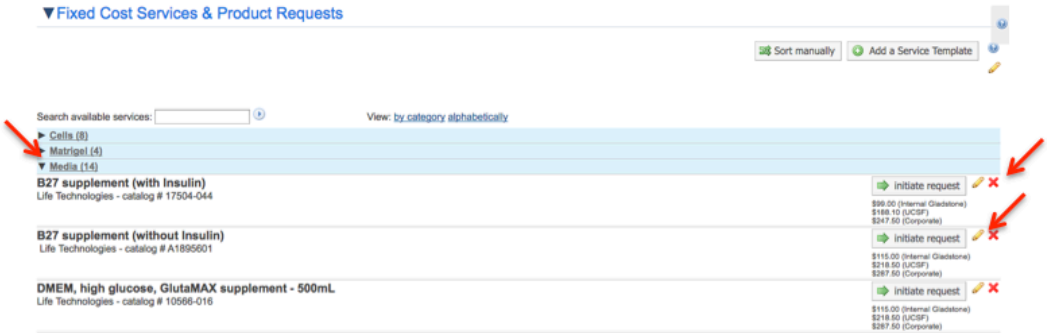


8. EDITING AND DELETING ITEMS

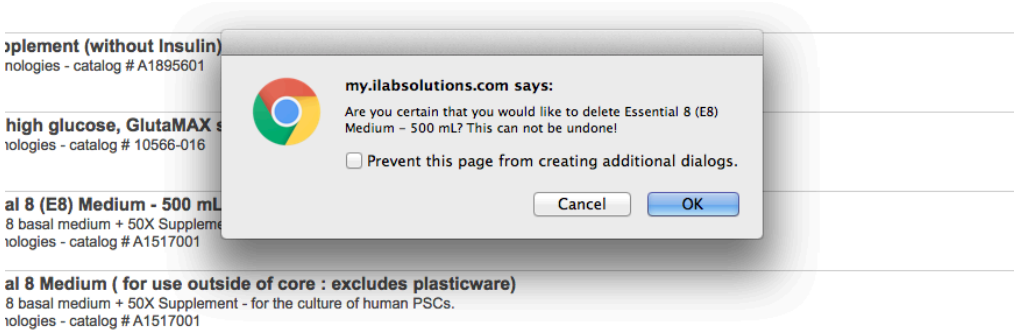
8.1. Click on the "Request Services" tab.



8.2. Under the "Fixed Cost Services & Product Requests" click on the category of the item you want to edit or delete. This will open up a menu of all the items in this category.

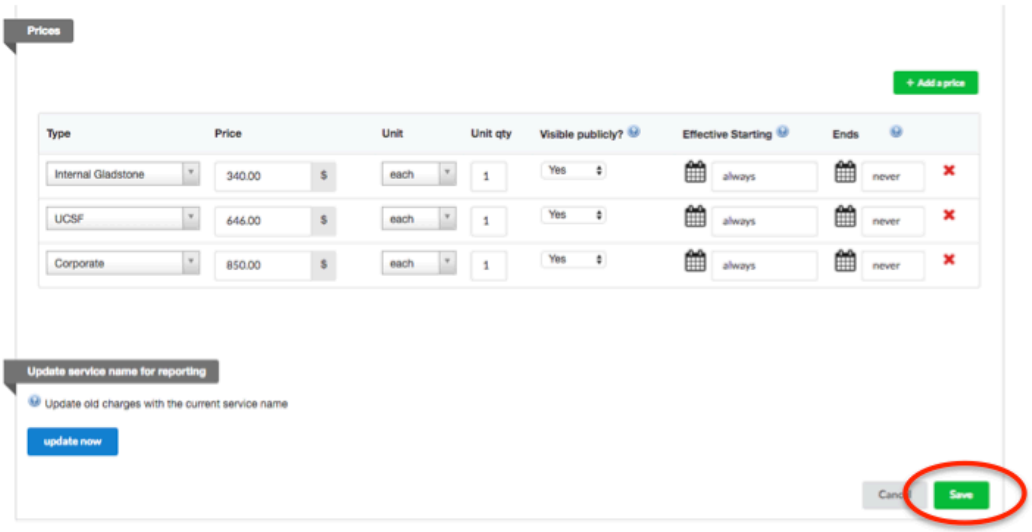


8.3. To delete an item, click on the red X on the right hand side of the item listing. A dialog box will open asking if you want to delete the item. Click "OK".



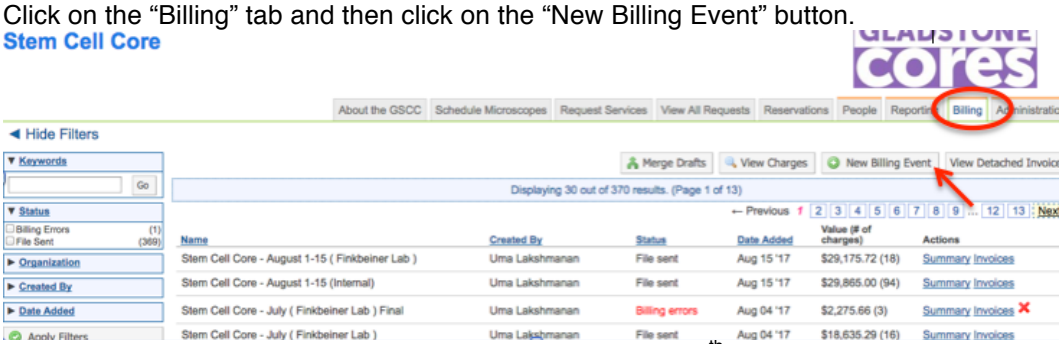
8.4. To edit an item, click on the pencil icon on the right hand side of the item listing. This will bring up the item template, which can be edited.

Click the Save button to save your changes.



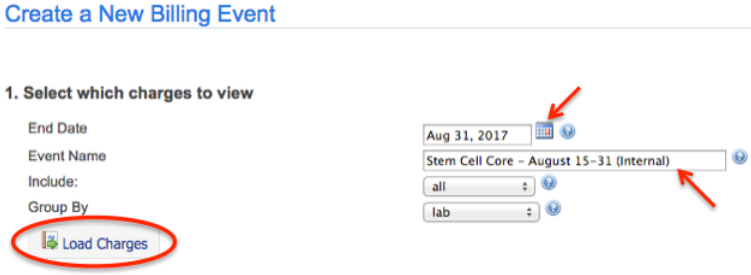
9. BILLING

9.1. Click on the "Billing" tab and then click on the "New Billing Event" button.

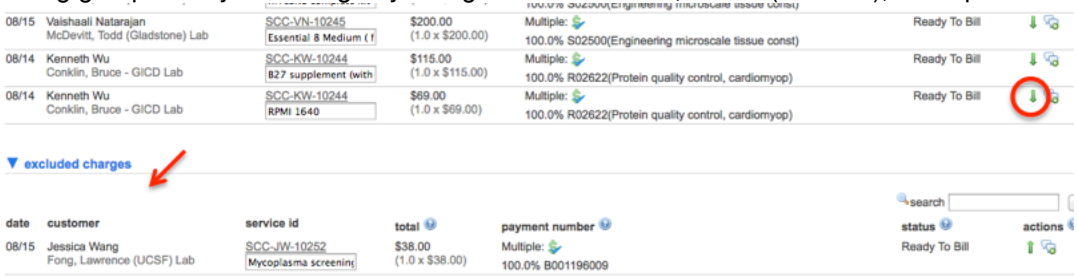


9.2. In the form that populates, select the end date (either the 15th or last day of the month) and update the event name to the date range and billing group. Click the "Load Charges" button.

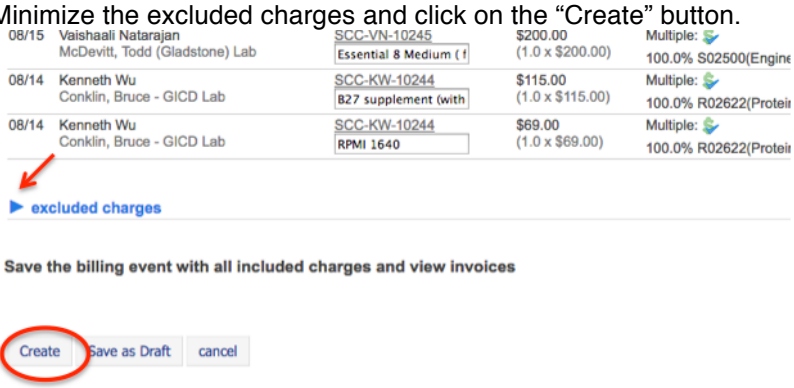
Billing groups are: Internal, Finkbeiner Lab, External (UCSF), or Corporate.



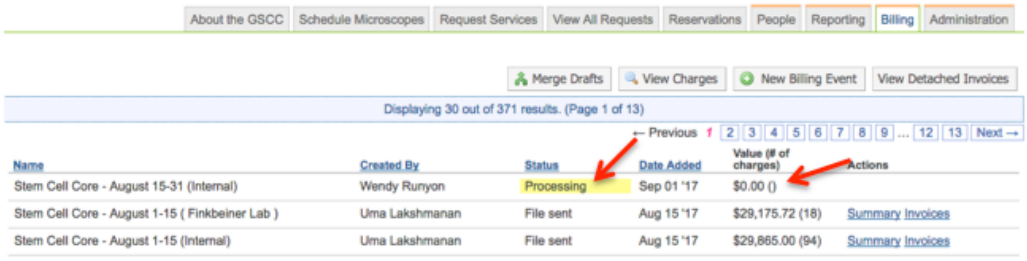
9.3. Click on the green arrows to the left of the charges to exclude a charge. These will move down to the "excluded charges" section. Most charges are internal, so process this billing group first by excluding any charges for Finkbeiner, UCSF (external), or corporate.



9.4. Minimize the excluded charges and click on the "Create" button.



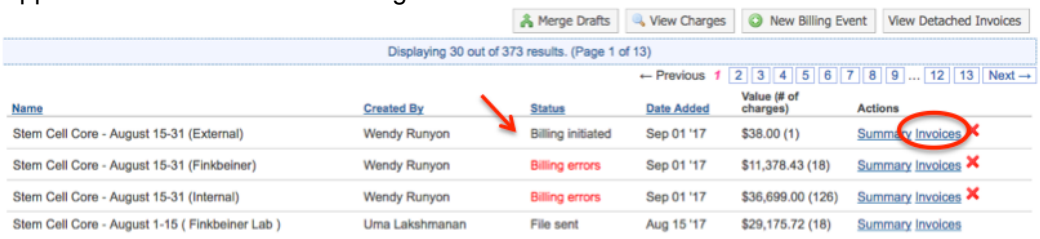
9.5. Wait for the billing event to finish processing. A price will populate under the Value column when this occurs.



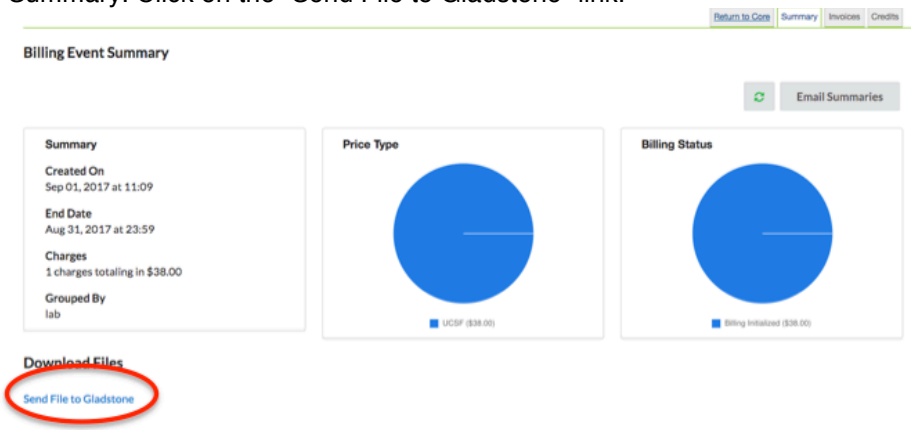
9.6. Repeat steps 1-4 for any additional billing groups.

9.7. When all billing events have been created, click on the "Invoices" link for all new billing events.

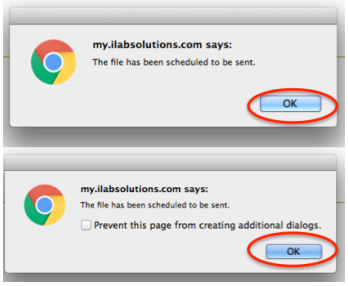
For external customers, billing is automatically initiated. Internal customers will need to approve the invoices before billing can be initiated.



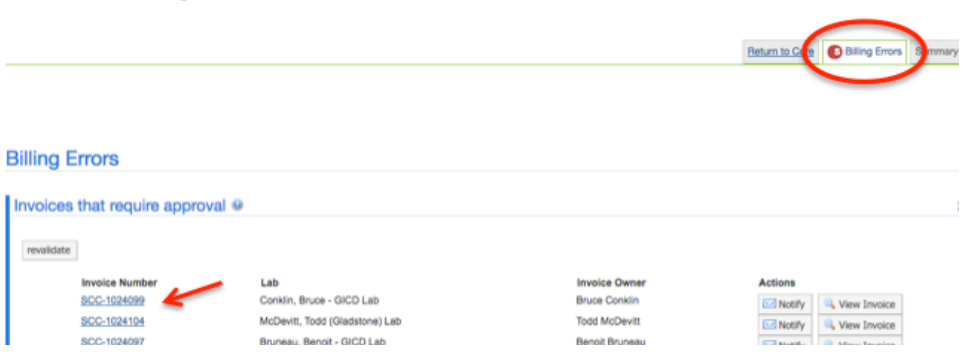
9.8. For external billing events, clicking on the "Invoices" link will bring up the Billing Event Summary. Click on the "Send File to Gladstone" link.



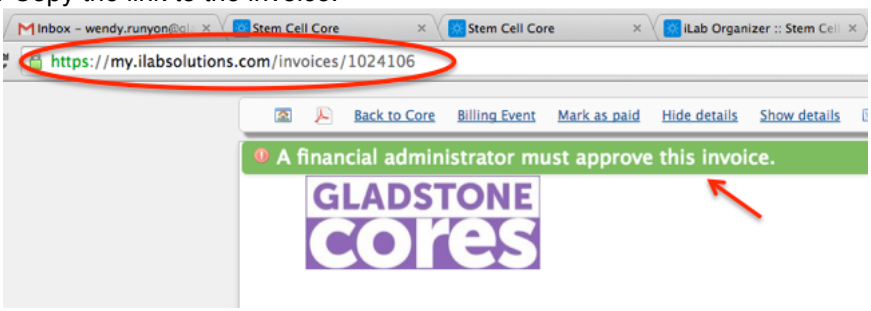
9.9. This will create the following pop-up windows. Click on "OK" for both.



9.10. For internal customers, click on the "Billing Errors" tab to bring up a list of invoices that need to be approved. Click on each invoice link to bring up the invoice.



9.11. Copy the link to the invoice.



9.12. Send an email to the financial manager for each lab's invoice.

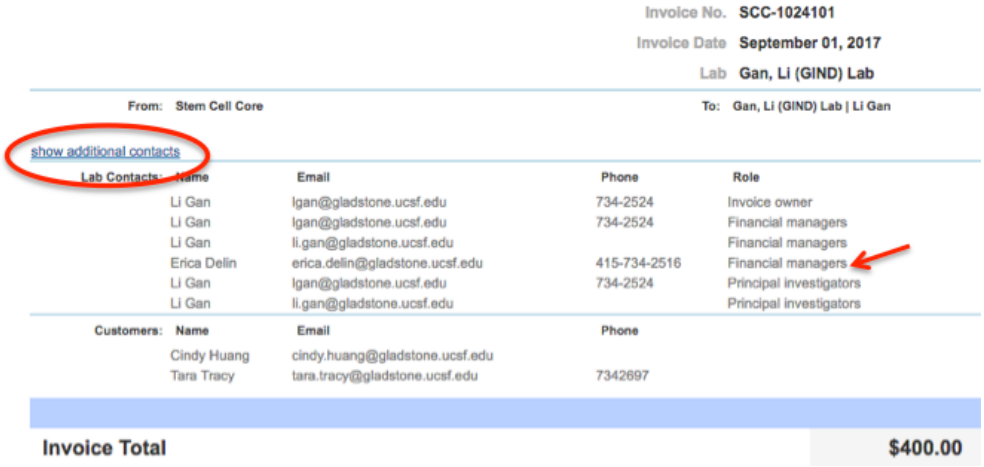
Hi [name],

Please approve the below invoice link to complete our stem cell core billing for [month and year].

[insert link]

Thank you,
[name]

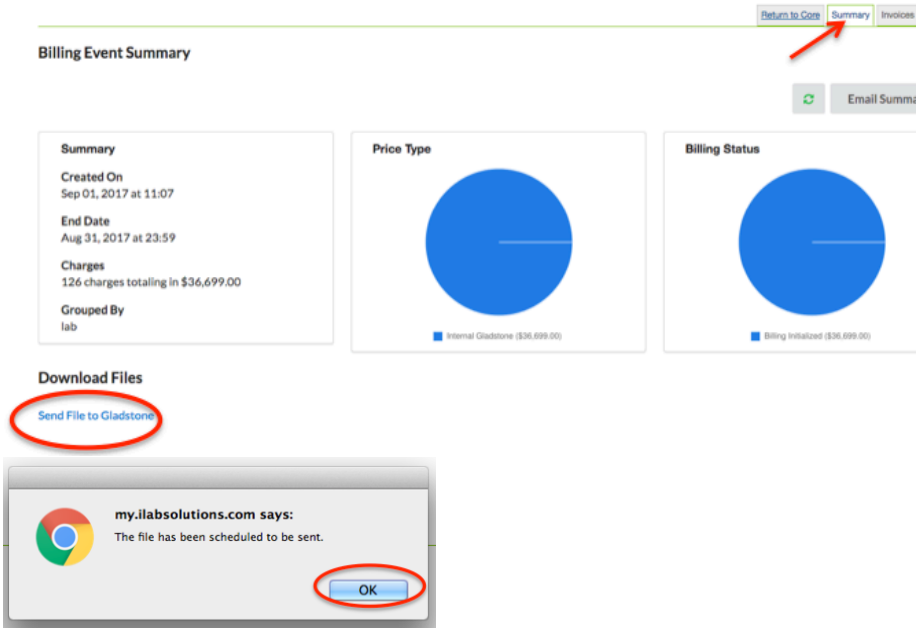
9.13. To find the financial manager for each invoice, click on "show additional contacts" on the invoice.



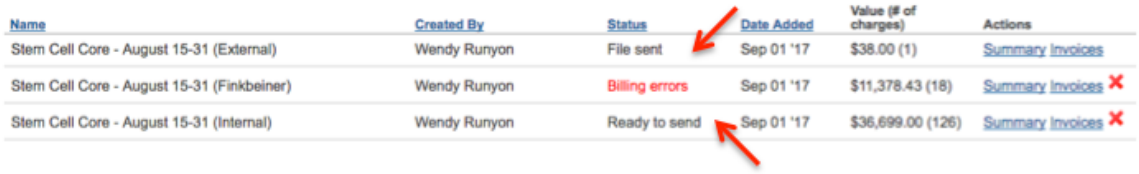
9.14. The billing page will show a red "Billing Errors" under the status until each invoice has been approved for the billing group.

9.15. When all the invoices have been approved for a billing group and the status shows "Billing Initiated", click on the "Summary" link.

9.16. Click on the "Send File to Gladstone" link. Click "OK" in the pop-up window. Then click on the "Return to Core" tab next to the Summary tab.



9.17. The status of the billing group should now read “Ready to send”. When the file has been sent (usually by the next day) the status will say “File sent”.



Name	Created By	Status	Date Added	Value (# of charges)	Actions
Stem Cell Core - August 15-31 (External)	Wendy Runyon	File sent	Sep 01 '17	$38.00 (1)	Summary Invoices
Stem Cell Core - August 15-31 (Finkbeiner)	Wendy Runyon	Billing errors	Sep 01 '17	$11,378.43 (18)	Summary Invoices
Stem Cell Core - August 15-31 (Internal)	Wendy Runyon	Ready to send	Sep 01 '17	$36,699.00 (126)	Summary Invoices