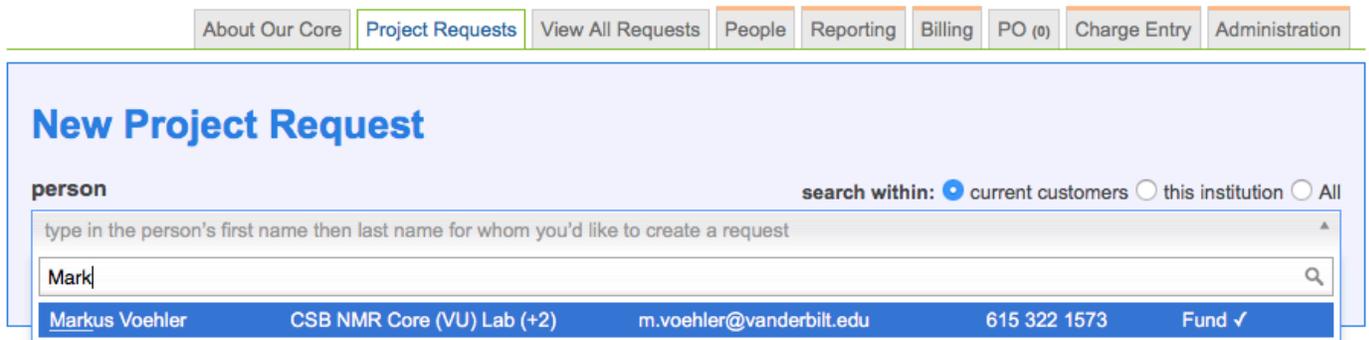


# How to create a New Project for the BioMolecular NMR Facility

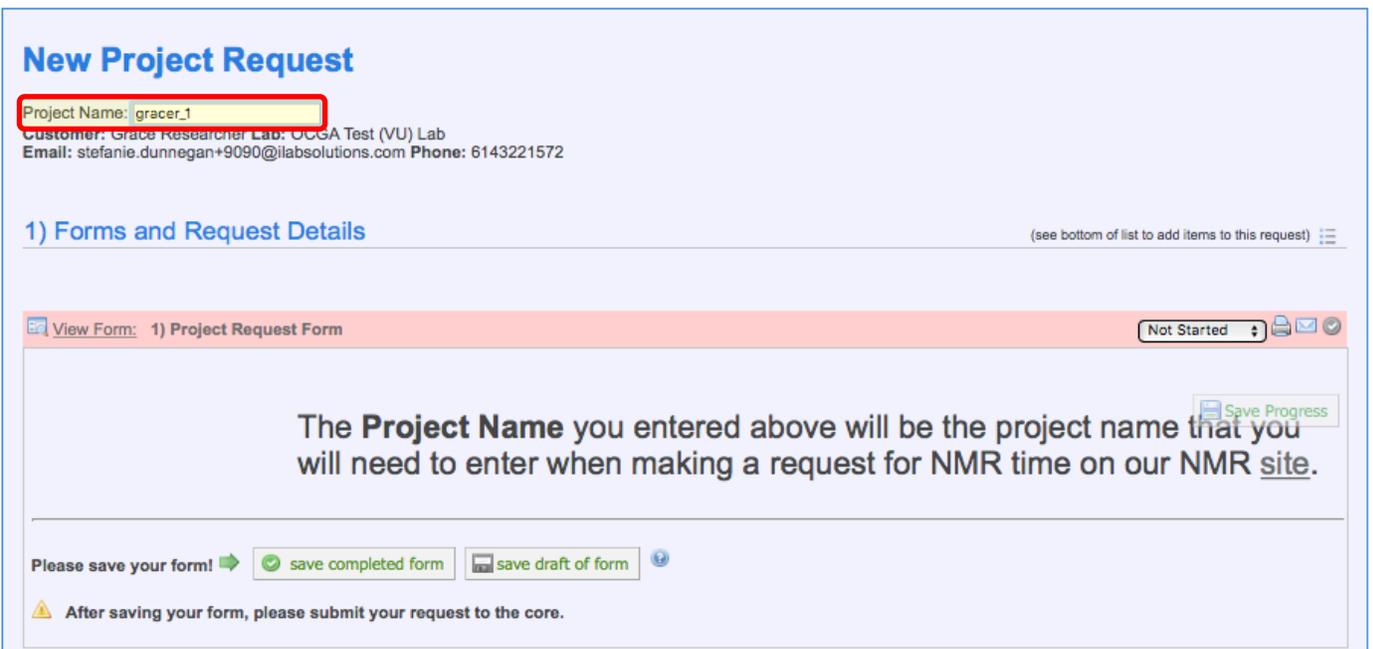
(Markus Voehler, March 9, 2018)

- 1) Login to your iLab account
- 2) Go to the **Project Requests** tab
- 3) In the section “New Project Request (Project Request)” click on the **initiate requests** tab
- 4) Click on the name field and write your name (if applicable):



The screenshot shows the 'New Project Request' interface. At the top, there are navigation tabs: 'About Our Core', 'Project Requests', 'View All Requests', 'People', 'Reporting', 'Billing', 'PO (0)', 'Charge Entry', and 'Administration'. The 'Project Requests' tab is active. Below the tabs, the title 'New Project Request' is displayed. Underneath, there is a 'person' search section with a 'search within' dropdown set to 'current customers'. A search input field contains 'Mark'. Below the search field, a list of results is shown, with the first entry highlighted: 'Markus Voehler', 'CSB NMR Core (VU) Lab (+2)', 'm.voehler@vanderbilt.edu', '615 322 1573', and 'Fund ✓'.

- 5) Select the proper group, if applicable
- 6) click on the **Proceed** tab
- 7) **Add the project name into top field. If possible, use your login name with the appendix ‘\_1’**



The screenshot shows the 'New Project Request' form after the search. The 'Project Name' field is highlighted with a red box and contains the text 'gracer\_1'. Below the search results, the following information is displayed: 'Customer: Grace Researcher Lab: OCGA Test (VU) Lab', 'Email: stefanie.dunnegan+9090@ilabsolutions.com', and 'Phone: 6143221572'. The section is titled '1) Forms and Request Details' and includes a '(see bottom of list to add items to this request)' link. Below this, there is a 'View Form: 1) Project Request Form' section with a 'Not Started' status and a 'Save Progress' button. A large message states: 'The Project Name you entered above will be the project name that you will need to enter when making a request for NMR time on our NMR site.' At the bottom, there are buttons for 'save completed form' and 'save draft of form', along with a warning icon and the text: 'After saving your form, please submit your request to the core.'

Click on tab **save draft of from** or tab **Save Progress**

8) Skip section "2) Cost"

9) Add your billing information in Section3

- If you have only one source, use 100% and select that source in the COA / POET field
- For multiple sources, change the percentage value, select the source
- Click on the **Split Charge** tab. This will automatically fill the percentage tab to make the total 100%.
- Select the second charge
- Continue to add charges as needed

3) Payment Information

Please enter the COA/POET

%	COA/POET
1 60 %	1551156789 (Expires on April 26, 2018)
2 40.0 %	Select COA/POET... 1551156789 (Expires on April 26, 2018) 1551150056 (Warning: Expires on March 31, 2018) 1551150067 (Expires on April 26, 2018)

100%

enter additional payment information

submit request to core save draft request Cancel

10) You can optionally add a comment

11) If done click on the **submit request to core** tab

**Use this Project Name whenever you request NMR time**

**Spectrometer** \*select spectrometer

Username

Request Time \*select time unit

**Project Name**

Start Time \* (mm/dd/yy)

## Change of Charges for a Project:

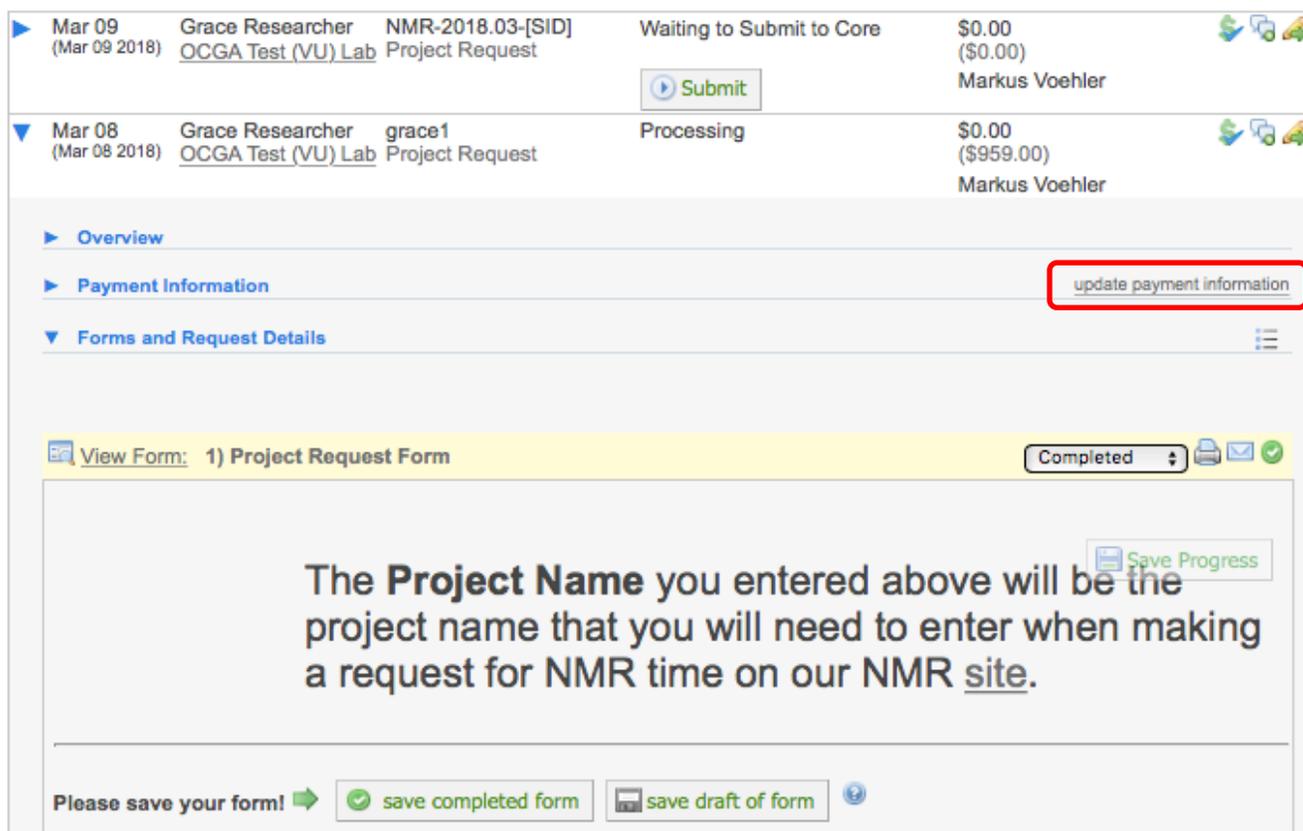
### A) Create a new Project Name

- Try to avoid this as far as possible. There is a danger of confusion with too many project names and you might not bill the proper project.
- We aim to have only one active project for the Biomolecular NMR Core, called <login name>\_1

### B) Modify your charging information on a Request

**If you need to change a charge on an individual request or change your billing permanently into the future, you may do so by modifying an existing Project Name**

- Login to your iLab account
- Select the  tab
- Click on the  to expand the request you want to modify



The screenshot displays the iLab interface. At the top, there is a table of requests:

Date	Researcher	Lab	Request Name	Status	Amount	Requester
Mar 09 (Mar 09 2018)	Grace Researcher	OCGA Test (VU) Lab	NMR-2018.03-[SID] Project Request	Waiting to Submit to Core	\$0.00 (\$0.00)	Markus Voehler
Mar 08 (Mar 08 2018)	Grace Researcher	OCGA Test (VU) Lab	grace1 Project Request	Processing	\$0.00 (\$959.00)	Markus Voehler

Below the table, there are navigation tabs: Overview, Payment Information, and Forms and Request Details. The "Payment Information" tab is selected, and a red box highlights the "update payment information" button. Below this, there is a form titled "View Form: 1) Project Request Form" with a "Completed" status. The form contains the following text:

The **Project Name** you entered above will be the project name that you will need to enter when making a request for NMR time on our [NMR site](#).

At the bottom of the form, there are three buttons: "save completed form", "save draft of form", and "Save Progress".

- Click on "update payment information"

charge	billing status	COA/POET	amount	
NMR Day   day service	Billing Initialized	1551156789	\$548.00	<input checked="" type="checkbox"/>
NMR Hour   hourly charge	Billing Initialized	Multiple COA/POETs...	\$411.00	<input type="checkbox"/>
NMR Hour   hourly charge	80.000%	1551156789	\$328.80	
NMR Hour   hourly charge	20.000%	1551150056.....	\$82.20	

**selected charge(s) total: \$ 548.00**

Amount currently due: \$0.00

▼ Update payment info for selected (+) charges

COA/POETs ⓘ 1  %

**100.0%**      **total allocated** ⓘ

**make default for project?**

payment notes ⓘ

- I. Select the service you want to change payment on (you can select only one or all)
  - II. Under “Update payment info for selected charges”, modify your payment
  - III. **If you select “make default for project” by checking the box, this payment schedule will be applied for all future charges under this Project Name.**
  - IV. **If you want to apply the changes only to the selected services, UNCHECK this box “make default for project”**
- Save Changes

You have either changed your charges for one or several individual time blocks, **OR** changed them permanently for all future reservations, until you change it again. By doing so, you avoid having to create new Project Names!