This document outlines the steps to prepare and send a billing event using the charge entry upload option.

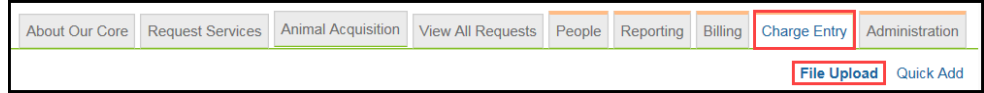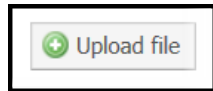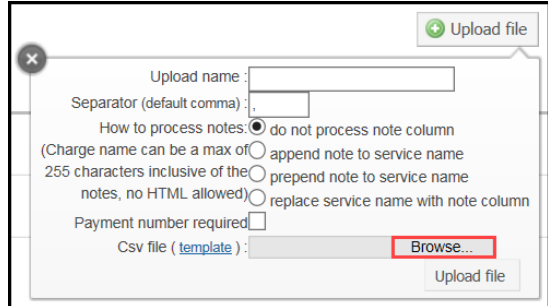| Access iLab	
Go to the iLab solutions site using the direct link or the One Purdue Portal and login using your Boilerkey credentials. Help logging in to iLab using Boilerkey can be found here.	purdue.ilabsolutions.com **Lab Management** *iLab* ★★★★★ (0)

Upload Charges	
Click the name of the core facility to prepare its billings.	
Click **Charge Entry** tab. Click **File Upload**.	
Click **Upload file**.	
Click **Browse…** to locate prepared upload CSV file.	

Find file and click to select. Click **Open**.	
Enter **Upload name**. *Ex: CMALF Billing December 2016.* Click **Upload file**.	
The following statuses may be displayed as the upload is in progress: • **Enqueued for validation** – File is uploading and preparing for validation. • **Errors present** – Some items contain errors and must be fixed to move forward. • **File invalid** – The uploaded file does not meet the required specifications. • **Processed** – Upload was successfully validated.	
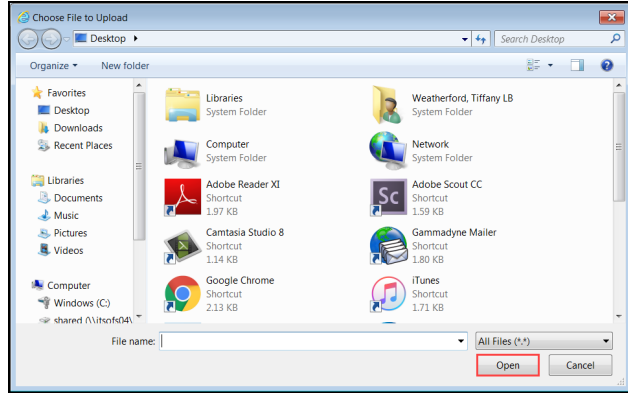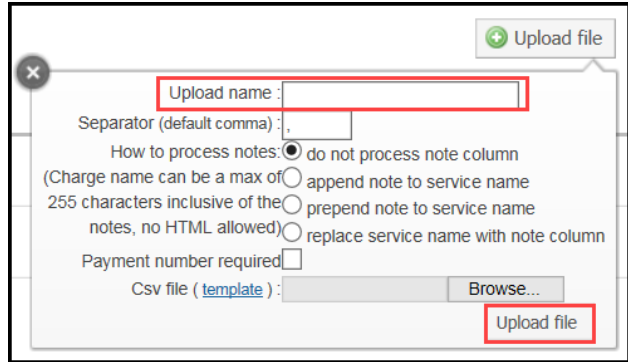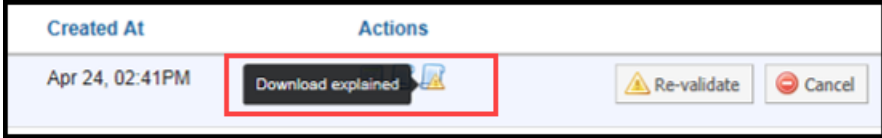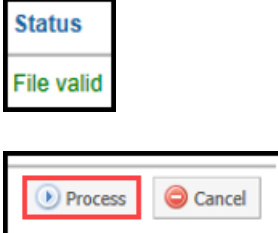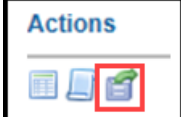
Errors

Errors present

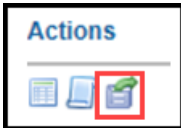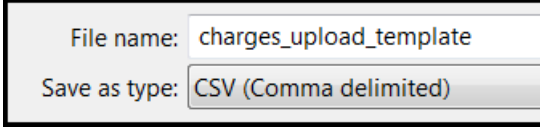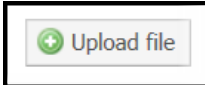|	
Click **Download explained** to open Excel file.	**Created At** — **Actions** — Apr 24, 02:41PM — Download explained — ⚠ Re-validate — ⊖ Cancel
Line items containing errors will have a reason code. Fix error using the following methods:	*Invalid payment number entered* • Check the format and possible typos of the account string • New account and Business Office needs to add account under PI • Check GM Aims for SPS account info • Contact PI's Business Office for a valid account *Could not identify user's lab, check PI email; invalid payment number entered* • Contact Business Office to update iLab to include account under PI *Owner not found; PI user is not registered in the system; invalid payment number entered* • Contact Business Office to update iLab to include account under PI
Once errors are fixed, save file and re-upload to iLab. Click **Validate**.	**Actions** — ✔ Validate
Once the Status of **File valid** appears, click **Process**.	**Status** — File valid — ▶ Process ⊖ Cancel
Click ▦ to **Archive** original uploaded file containing errors.	**Actions**

File invalid

Click ▦ to **Archive** original uploaded file containing errors.	**Actions**
Verify file is in **csv** format.	File name: charges_upload_template Save as type: CSV (Comma delimited)
Click **Upload file** to upload corrected file.	⊕ Upload file

Actions

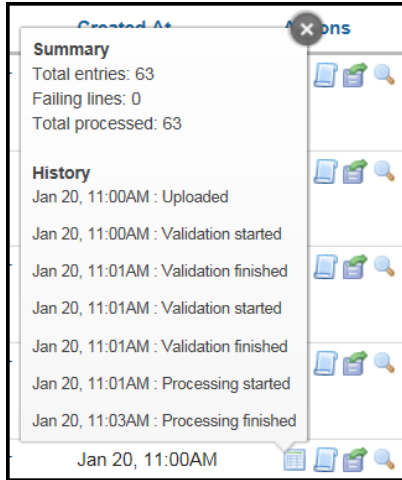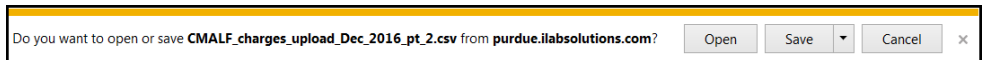|	
The following actions are available upon completion of a successful billing upload: • Show Details • Download original • Archive • Show results	**Actions**
Click [ ] to **Show Details**.	**Summary** Total entries: 63 Failing lines: 0 Total processed: 63 **History** Jan 20, 11:00AM : Uploaded Jan 20, 11:00AM : Validation started Jan 20, 11:01AM : Validation finished Jan 20, 11:01AM : Validation started Jan 20, 11:01AM : Validation finished Jan 20, 11:01AM : Processing started Jan 20, 11:03AM : Processing finished Jan 20, 11:00AM
Click [ ] to **Download original** upload file. Click **Open** to view or **Save** to save file outside iLab.	Do you want to open or save **CMALF_charges_upload_Dec_2016_pt_2.csv** from **purdue.ilabsolutions.com**? Open Save ▼ Cancel ×
Click [ ] to **Archive**.	
Click [ ] to **Show results**. Individual line items are displayed below the upload.	"CMALF Dec 2016 pt 2" resulting charges
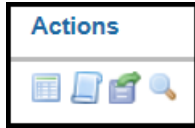
"CMALF Dec 2016 pt 2" resulting charges

date	entered by	service name	quantity	price	total price	billing status	work status
Jan 20 12:00 AM	Stephanie Les ▾	CMLAF(CMLAF)-JH-39 Mice - Barrier Ventilated *Per Cage* Animal Husbandry	Quantity: 1920.0	Unit price: $0.40	Total: $768.00	Billing Status: Billing Initialized	Work Status: Completed ▾
Jan 20 12:00 AM	Stephanie Les ▾	CMLAF(CMLAF)-JH-39 Mice - Barrier / Biohazard *Per Cage* Animal Husbandry	Quantity: 265.0	Unit price: $0.95	Total: $251.75	Billing Status: Billing Initialized	Work Status: Completed ▾
Jan 20 12:00 AM	Stephanie Les ▾	CMLAF(CMLAF)-JH-39 Rats - (Non Autoclaved) *Per Animal* Animal Husbandry	Quantity: 2145.0	Unit price: $0.80	Total: $1,716.00	Billing Status: Billing Initialized	Work Status: Completed ▾
Jan 20 12:00 AM	Stephanie Les ▾	CMLAF(CMLAF)-TR-40 Mice - Barrier Ventilated *Per Cage* Animal Husbandry	Quantity: 127.0	Unit price: $0.40	Total: $50.80	Billing Status: Billing Initialized	Work Status: Completed ▾
Jan 20 12:00 AM	Stephanie Les ▾	CMLAF(CMLAF)-TR-40 Mice - Barrier Ventilated *Per Cage* Animal Husbandry	Quantity: 4053.0	Unit price: $0.40	Total: $1,621.20	Billing Status: Billing Initialized	Work Status: Completed ▾
Jan 20 12:00 AM	Stephanie Les ▾	CMLAF(CMLAF)-TR-40 Mice - Barrier Ventilated *Per Cage*	Quantity:	Unit price:	Total:	Billing Status:	Work Status:

Create Billing Event

Edit criteria to display charges for the appropriate billing period. **End Date**: Last day of the billing period. **Event Name**: Auto-populates with name of core. **Include**: All (Both internal and external billings can be on the same event.) **Group By**: Select manner to group included charges.	**Create a New Billing Event** **1. Select which charges to view** End Date: May 31, 2016 Event Name: Purdue University Center for Cancer Research - May Include: all Group By: lab
Click **Load Charges**.	Load Charges
Click ⬇ to move a charge from the **included charges** list to the **excluded charges** list. Click ⬆ to move a charge from the **excluded charges** list to the **included charges** list.	**2. Review and select which charges to include** ▼ included charges 	date	customer	service id	total	payment number	status	actions
---	---	---	---	---	---	---
05/20	Stella Price / Bryant, Frances (PUR) Lab	PUCCR-SP-15 / Blood Collection	$82.00 (2.0 x $41.00)	Multiple: 50.0% 11010000-1099001000-7123456789 / 50.0% 21010000-8000000764 501 1063-9003	Ready To Bill	⬇
05/05	Gaston Gibson / Gibson, Gaston (UOPH) Lab	PUCCR-GG-10 / Chromosome Counting	$589.00 (1.0 x $589.00)	Multiple: 100.0% testpo#	Ready To Bill	⬇
04/15	Steven Frankel / Frankel, Steven (PUR) Lab	PUCCR-SF-6 / Blastocyst Injection of ES Cells	$9,340.00 (1.0 x $9,340.00)	Multiple: 100.0% 21030000-8000018473 Yr2 Noise 3C/Cost Share	Ready To Bill	⬇
04/13	Garland Russel / Frankel, Steven (PUR) Lab	PUCCR-GR-3 / Chromosome Counting	$380.00 (1.0 x $380.00)	Multiple: No payment info set...	Ready To Bill	⬇
04/13	Luc Mongeau / Mongeau, Luc (PUR) Lab	PUCCR-LM-4 / Balb/c- female	$53.85 (3.0 x $17.95)	Multiple: 100.0% 41010000-8000018470 Yr2 Noise 3B	Ready To Bill	⬇ | ▶ excluded charges | date	customer	service id	total	payment number	status	actions
---	---	---	---	---	---	---
05/20	Stella Price / Bryant, Frances (PUR) Lab	PUCCR-SP-7 / Blood Collection	$123.00 (3.0 x $41.00)	Multiple: 50.0% 21010000-8000000109 501 1063-9005 / 50.0% 21010000-8000001517 500 1063-8000	Ready To Bill	⬆
05/17	Stella Price / Bryant, Frances (PUR) Lab	PUCCR-SP-14 / (charge)	$850.00 (1.0 x $850.00)	Multiple: 50.0% 11010000-1099001000-7123456789 / 50.0% 21010000-8000000764 501 1063-9003	Ready To Bill	⬆	
Prior to creating a billing event, review the charges to ensure no errors are present. A line or charge with an error will be denoted with a red flag 🚩. <u>NOTE</u>: These errors must either be fixed or those charges with errors must be excluded to successfully create the billing event.	**2. Review and select which charges to include** ▼ included charges 	date	customer	service id	total	payment number	status	actions
---	---	---	---	---	---	---
04/15	Steven Frankel / Frankel, Steven (PUR) Lab	PUCCR-SF-6 / Blastocyst Injection of ES Cells	$9,340.00 (1.0 x $9,340.00)	Multiple: 100.0% 21030000-8000018473 Yr2 Noise 3C/Cost Share	Ready To Bill	⬇
04/13	Garland Russel / Frankel, Steven (PUR) Lab	PUCCR-GR-3 / Chromosome Counting	$380.00 (1.0 x $380.00)	Multiple: No payment info set...	Ready To Bill 🚩	⬇
04/13	Luc Mongeau / Mongeau, Luc (PUR) Lab	PUCCR-LM-4 / Balb/c- female	$53.85 (3.0 x $17.95)	Multiple: 100.0% 41010000-8000018470 Yr2 Noise 3B	Ready To Bill	⬇	
Click **Create** to prepare the file for overnight upload to SAP. Click **Save as Draft** to save file and bill the charges later. **Save as Draft** allows a file be to merged later with other	**3. Save the billing event with all included charges and view invoices** Create Save as Draft cancel

prepared and saved files for a later billing. Click **cancel** to discard the billing event.	
Overview of the billing event is displayed. The overview summarizes the external vs. internal totals and status.	
Click **Send file to Purdue**.	
Click **OK**.	
It is not necessary to **Download Files**. All billing event files are sent from iLab to SAP in an overnight upload.	
If needed, select an audience to send **Email Billing Event Summaries** to.	