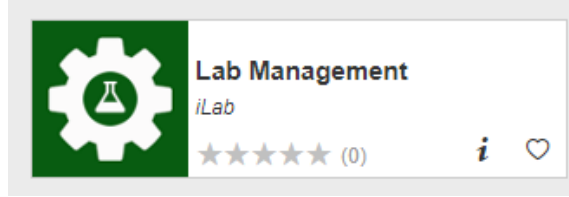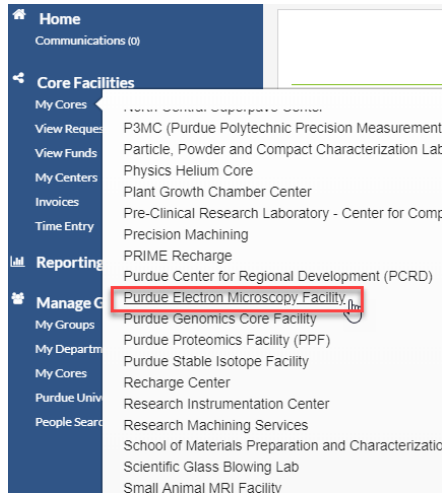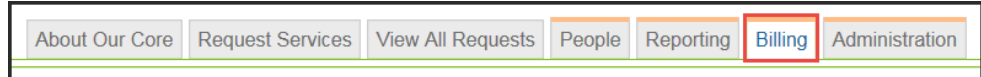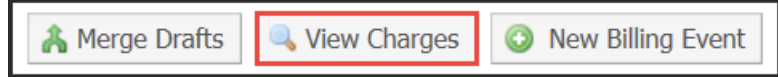The document outlines the steps to prepare and send a billing event.

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) *i* ♡

View Charges	
Click the name of the core facility to prepare its billings.	**Home** Communications (0) **Core Facilities** My Cores View Reques View Funds My Centers Invoices Time Entry **Reporting** **Manage C** My Groups My Departm My Cores Purdue Univ People Searc North Central Superpave Center P3MC (Purdue Polytechnic Precision Measurement Particle, Powder and Compact Characterization Lab Physics Helium Core Plant Growth Chamber Center Pre-Clinical Research Laboratory - Center for Comp Precision Machining PRIME Recharge Purdue Center for Regional Development (PCRD) Purdue Electron Microscopy Facility Purdue Genomics Core Facility Purdue Proteomics Facility (PPF) Purdue Stable Isotope Facility Recharge Center Research Instrumentation Center Research Machining Services School of Materials Preparation and Characterizatio Scientific Glass Blowing Lab Small Animal MRI Facility
Click **Billing** tab.	About Our Core | Request Services | View All Requests | People | Reporting | **Billing** | Administration
Click **View Charges**.	🔧 Merge Drafts | 🔍 **View Charges** | ⊕ New Billing Event
All charges that are eligible for billing are displayed. Click **create a billing event**.	**Upcoming Charges for the Purdue University Center for Cancer Research** [Return to Core] [create a billing event] See charges table below [create a billing event]

Upcoming Charges table:

date	customer	service name	quantity	unit price	total price	billing status	work status
May 20 09:03 AM	Stella Price	PUCCR-SP-15 Blood Collection / Biological Evaluation	Quantity: 2.0	Unit price: $41.00	Total: $82.00	Billing Status: Ready To Bill	Work Status: Processing
May 05 05:08 PM	Gaston Gibson	PUCCR-GG-10 Chromosome Counting / Transgenic Mouse	Quantity: 1.0	Unit price: $589.00	Total: $589.00	Billing Status: Ready To Bill	Work Status: Completed
Apr 15 11:10 AM	Steven Frankel	PUCCR-SF-6 Blastocyst Injection of ES Cells / Transgenic Mouse	Quantity: 1.0	Unit price: $9,340.00	Total: $9,340.00	Billing Status: Ready To Bill	Work Status: Financials A
Apr 13 07:03 PM	Garland Russel	PUCCR-GR-3 Chromosome Counting / Transgenic Mouse	Quantity: 1.0	Unit price: $380.00	Total: $380.00	Billing Status: Ready To Bill	Work Status: Completed
Apr 13 07:02 PM	Luc Mongeau	PUCCR-LM-4 Balb/c- female / Biological Evaluation	Quantity: 3.0	Unit price: $17.95	Total: $53.85	Billing Status: Ready To Bill	Work Status: Completed

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 search ___ Clear **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 search ___ Clear **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 search ___ Clear **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.	**Overview** Summary Created on May 23, 2016 at 11:58 End date May 31, 2016 at 23:59 This billing event includes 5 charges totaling in **$10,444.85**. Invoices were created grouped by **lab**. Price Type Billing Status ■ Internal ($9,855.85) ■ External Non Profit ($589.00) ■ Billing Initialized ($10,444.85)
Click **Invoices** tab.	Return to Core | Summary | Invoices | Credits
Click **send invoices with selected price types to invoice owners…** and select **Internal**. Click **Send Invoices**. An email notification which includes a link to the invoice will be sent to the Invoice Owner/Financial Contact (most likely the PI) for approval.	**Invoices** **Bulk Invoice Mailer** ○ send invoices to all invoice owners ○ send invoices to selected invoice owners … ● send invoices with selected price types to invoice owners… ☑ Internal ☐ External Non-Profit ☐ External Small Business ☐ External For Profit ○ send unpaid invoices ○ send invoices missing billing information to selected invoice owners… ☐ Prepend custom message to invoice emails? Send Invoices ⑦ $ Mark all invoices as paid | Mark all invoices as billed | 📄 Download one PDF of All Invoices
It is not necessary to **Download Files**. All billing event files are sent from iLab to SAP in an overnight upload.	**Download Files** Undo file send The billing file has already been **scheduled to be sent** 📊 Internal 📊 External
If needed, select an audience to send **Email Billing Event Summaries** to.	**Email Billing Event Summaries** To help clarify features, we have moved the 'send invoices' functionality to the 'Invoices' tab (see upper right of this page). ☐ Send Summary to Institution Managers ☐ Send Summary to Service Center Managers Send Summary to Additional Emails [_____] Send Summaries

Billing Errors

A billing event which contains errors will fail and not process. No charges listed on the billing event will process until the error is resolved.

If a billing event contains an error, the results will include warning/error messages.	⊘ Errors have been found on charges on this billing event. Click on the Billing Errors tab to view and resolve these problems.
	Warning: This billing event has one or more charges with an error. Please click on the 'billing errors' tab at the top to see more details and resolve any errors before you can finalize this billing event.

Click **Billing Errors** to view those charges which contain errors.

Return to Core   **1**   Billing Errors   Summary   Invoices   Credits

Click **View Invoice** to open invoice and make correction(s).

Billing Errors

Internal charges missing payment information ⓘ   May 23, 2016 ⓘ

revalidate

Invoice Number	Lab	Invoice Owner	Actions
PUCFCR-798	Frankel, Steven (PUR) Lab	Steven Frankel	✉ Notify 🔍 View Invoice

The line containing the error is noted with a red arrow ⬅.

Click the corresponding payment icon to fix the payment error.

PURDUE
UNIVERSITY.
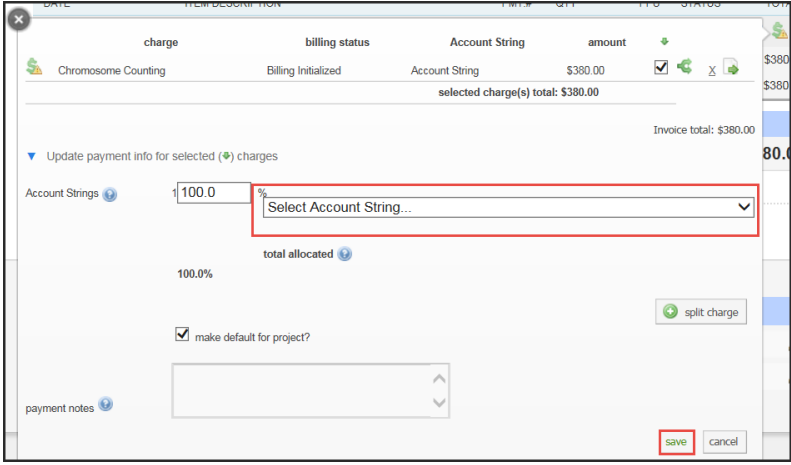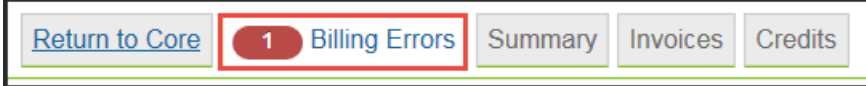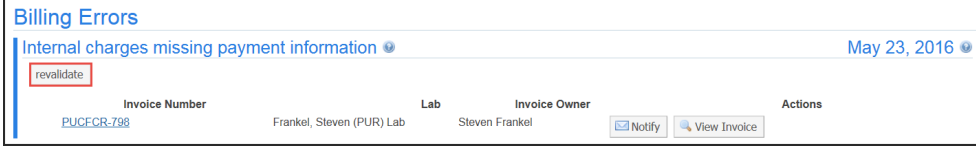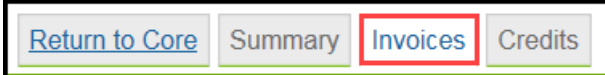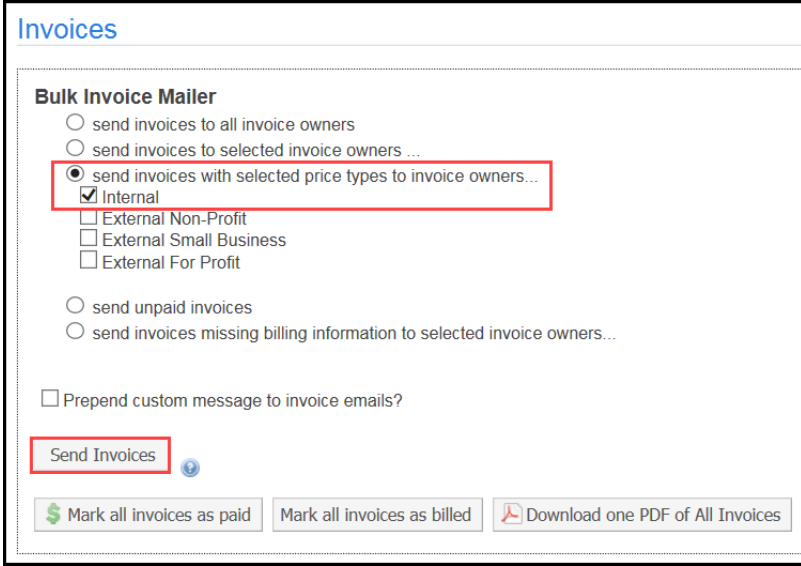
Invoice No. **PUCFCR-798**
Invoice Date **May 23, 2016**
Lab **Frankel, Steven (PUR) Lab**

From: Purdue University Center for Cancer Research   To: Frankel, Steven (PUR) Lab | Steven Frankel

show additional contacts

Invoice Total						**$9,720.00**
		Invoice Details				
DATE	ITEM DESCRIPTION	PMT.#	QTY	PPU	STATUS	TOTAL
▼ **Request: PUCCR-GR-3** **Start:** April 13, 2016 **Owner:** Garland Russel					🔍 💲	
April 13, 2016	Chromosome Counting	2 splits	1.0	$380.00/ea	Completed	$380.00
	(36395) Split #1	Account String	50.000%			$190.00
	(38355) Split #2	Account String	50.000%			$190.00
Actual cost: $10,920.00		Projected cost: $230.49			Invoice cost: $380.00	
▼ **Request: PUCCR-SF-6** **Start:** April 15, 2016 **Owner:** Steven Frankel					🔍 💲	
(36423) April 15, 2016	Blastocyst Injection of ES Cells	21030000-- 8000018473 Yr2 Noise 3C/Cost Share	1.0	$9,340.00/ea	Financials approved	$9,340.00
Actual cost: $9,340.00		Projected cost: $9,340.00			Invoice cost: $9,340.00	
Invoice Total						**$9,720.00**

Select the correct account assignment from drop-down menu. Click **save**.	
Click **Billing Event** to exit invoice and return to billing summary.	
Click **Billing Errors**.	
Click **revalidate** to verify account information is accurate.	
Click **Invoices** tab.	
Click **send invoices with selected price types to invoice owners…** and select **Internal**. Click **Send Invoices**. An email notification which includes a link to the invoice will be sent to the Invoice Owner/Financial Contact (most likely the PI) for approval.	

It is not necessary to **Download Files**. All billing event files are sent from iLab to SAP in an overnight upload.	**Download Files** Undo file send The billing file has already been **scheduled to be sent** 📊 Internal 📊 External
If needed, select audience to send an **Email Billing Event Summaries** to.	**Email Billing Event Summaries** To help clarify features, we have moved the 'send invoices' functionality to the 'Invoices' tab (see upper right of this page). ☐ Send Summary to Institution Managers ☐ Send Summary to Service Center Managers Send Summary to Additional Emails [ ] Send Summaries

Merge Multiple Saved Billings

If multiple drafts were created to merge later with other prepared and saved files, those individual files must be merged to send the billing file from iLab to SAP.

Click **Billing** tab.	About Our Core Request Services View All Requests People Reporting **Billing** Administration
Status of files to be merged is listed as **Draft**.	**Name** **Created By** **Status** **Date Added** Value (# of charges) Actions Purdue University Center for Cancer Research - May Royal Smith Draft May 24 '16 $0.00 (1) Details Edit ✖ Purdue University Center for Cancer Research - May Royal Smith Draft May 24 '16 $0.00 (2) Details Edit ✖
Click **Merge Drafts**.	🧍 Merge Drafts 🔍 View Charges ⊕ New Billing Event

Click the checkbox next to all draft billings to include in the merged billing event.	**Billing Events To Merge**
	
	      Core Name **Name** **Grouped by** **Status** ☑ Select All
	Purdue University Center for Cancer Research
	   Purdue University Center for Cancer Research - May lab Draft ☑
	   Purdue University Center for Cancer Research - May lab Draft ☑

Click **Merge Drafts**.	🧍 Merge Drafts
Click **OK**.	Message from webpage ✖ ❓ Draft events from the same core, same grouping (by lab, by researcher, by payment info) and same status (Draft or Pending review) will be merged. Click OK to merge selected draft events. OK Cancel
Click **Edit**.	Purdue University Center for Cancer Research - May Royal Smith Draft May 24 '16 $0.00 (3) Details Edit ✖

Click **Create Billing File and Invoices**.	**3. Save the billing event with all included charges and view invoices** Update Draft Create Billing File and Invoices Delete Draft cancel
Click **Invoices** tab.	Return to Core Summary Invoices Credits

Click **send invoices with selected price types to invoice owners…** and select **Internal**.
 	
Click **Send Invoices**.
 	
An email notification which includes a link to the invoice will be sent to the Invoice Owner/Financial Contact (most likely the PI) for approval.
	Invoices
	
	Bulk Invoice Mailer
	○ send invoices to all invoice owners
	○ send invoices to selected invoice owners …
	● send invoices with selected price types to invoice owners…
	  ☑ Internal
	  ☐ External Non-Profit
	  ☐ External Small Business
	  ☐ External For Profit
	
	○ send unpaid invoices
	○ send invoices missing billing information to selected invoice owners...
	
	☐ Prepend custom message to invoice emails?
	
	Send Invoices ⓘ
	
	$ Mark all invoices as paid Mark all invoices as billed 🅿 Download one PDF of All Invoices

It is not necessary to **Download Files**. All billing event files are sent from iLab to SAP in an overnight upload.	**Download Files** Undo file send The billing file has already been **scheduled to be sent** 📊 Internal 📊 External
If needed, select an audience to send **Email Billing Event Summaries** to.	**Email Billing Event Summaries** To help clarify features, we have moved the 'send invoices' functionality to the 'Invoices' tab (see upper right of this page). ☐ Send Summary to Institution Managers ☐ Send Summary to Service Center Managers Send Summary to Additional Emails [ ] Send Summaries