UPPSALA
UNIVERSITET

iLab Core Facility Management Instructions for use

Work in progress

This guide is work in progress. If you find any errors or if instructions are unclear or missing please contact project manager Staffan Emrén at email staffan.emren@uu.se

Revision 0.94 2021-03-10

Introduction

iLab is a web based tool for managing services and instruments at a Core Facility. iLab implements a workflow that covers the neccesary steps from placing an order for services, confirmation of the order, status updates and billing at completion of the services.

Users of those services are affiliated to one or more research groups called Labs. Each Lab is led by a research leader, in iLab called PI (Principle Investigator). The PI role is financially responsible for the Lab, but can delegate most of the practical work in iLab to one or more of their group members.

Your Lab is created by an iLab administrator. Contact cfm-support.ufv@uu.se if you can not find it.

Terminology

Lab – Research group
Primary Investigator (PI) – Research leader
Manager – Research group member with administrative tasks
Member – Other research group members
Core – A facility that offers research related services, such as instruments or analysis services
Funds – Account/project used for billing

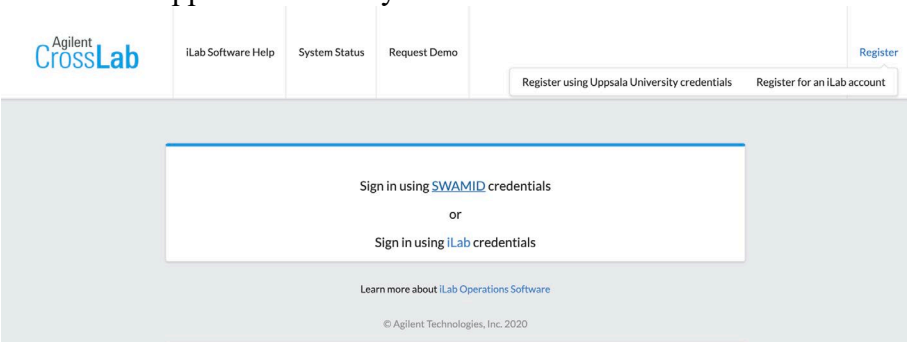
UPPSALA
UNIVERSITET

Table of contents

UPPSALA
UNIVERSITET

Create your account

Go to the address https://uu.ilab.agilent.com/account/login and hoover the mouse pointer over “Register” in the upper right corner. Then select either “Register using Uppsala University credentials” or “Register for an iLab account” depending on wether you have an account att Uppsala University or not.



You will be prompted to enter some personal information, and then at the next tab you will be asked to select a lab (research group).

If you are a research group member:
Start typing the name of your research leader in the text box, and select the appropriate lab. The lab name is on the form “Firstname Surename (UU) Lab”.

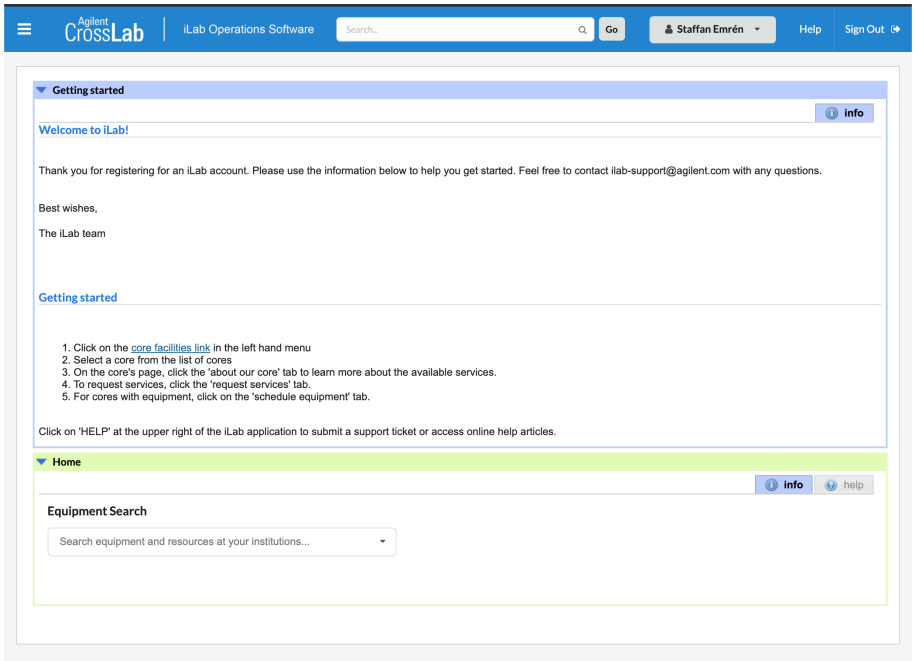
Before you can fully use the iLab site your lab manager must approve your membership.

If you are a research group leader (PI):
You can either create your lab directly by selecting “Create new group”, or you can order your lab by sending an email to cfm-support-ufv@uu.se. In the latter case you should select the group “A-New PI (UU) Lab”. When your lab is created you will be transferred to your lab by an administrator.

UPPSALA
UNIVERSITET

Navigating the iLab interface

You can log in to iLab either by clicking this link or by clicking a link provided by the core you intend to use. If you use the generic link above you will be met by the screen below. If you instead use a core specific link you will come directly to the start page of that core.

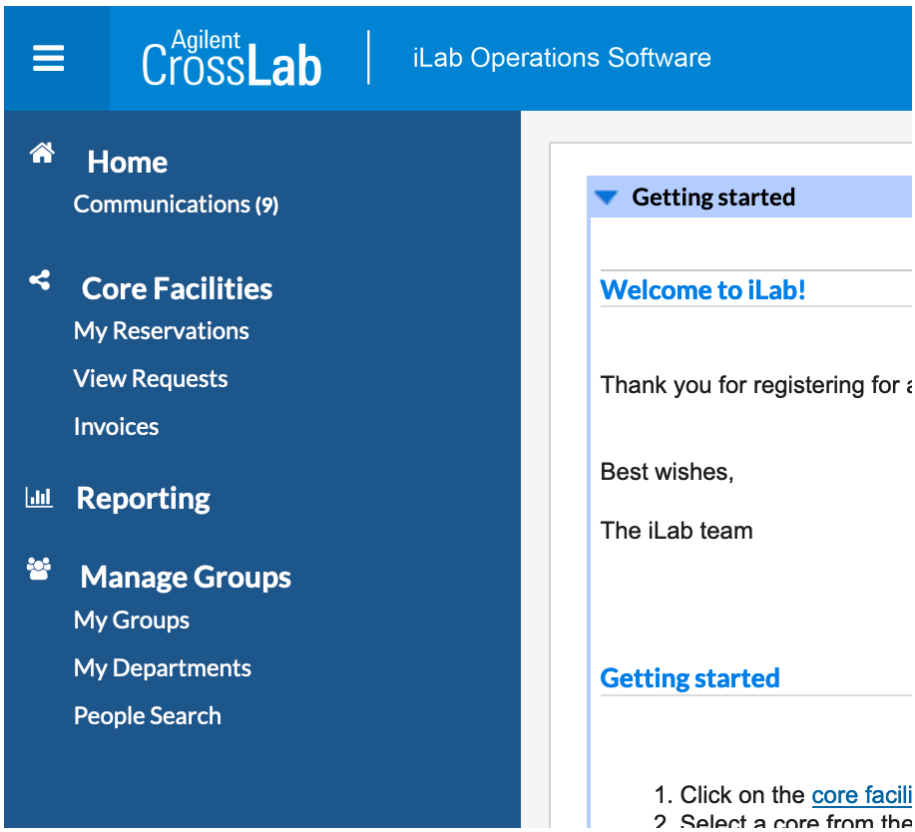


In the blue bar at top of the screen you find, from left to right:

- The “bar menu” (three horizontal bars) that lets you access different parts of the system.
- The Agilent product label which takes you back to this start page when you click it.
- The search function.
- Your name, clicking this takes you to your profile.
- Help button.
- Log out button (Sign Out).

Clicking the bar menu give you access to communications within the system, the cores available, your reservations, requests and invoices at cores, reporting and your groups, departments and people at the university, including the university hospital. What choises you have depends on your role and what labs you are affiliated to. (See picture at next page.)

UPPSALA
UNIVERSITET



If you

- want to request services from a core, go to page 21.
- want to administer your Lab, go to page 9.
- want to delegate administration of your Lab, go to page 6.

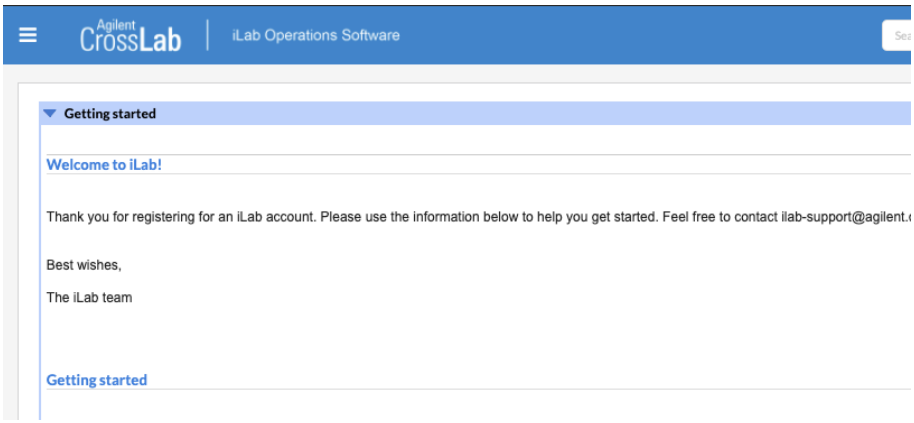
UPPSALA
UNIVERSITET

Delegate administrative responsibilities in a Lab

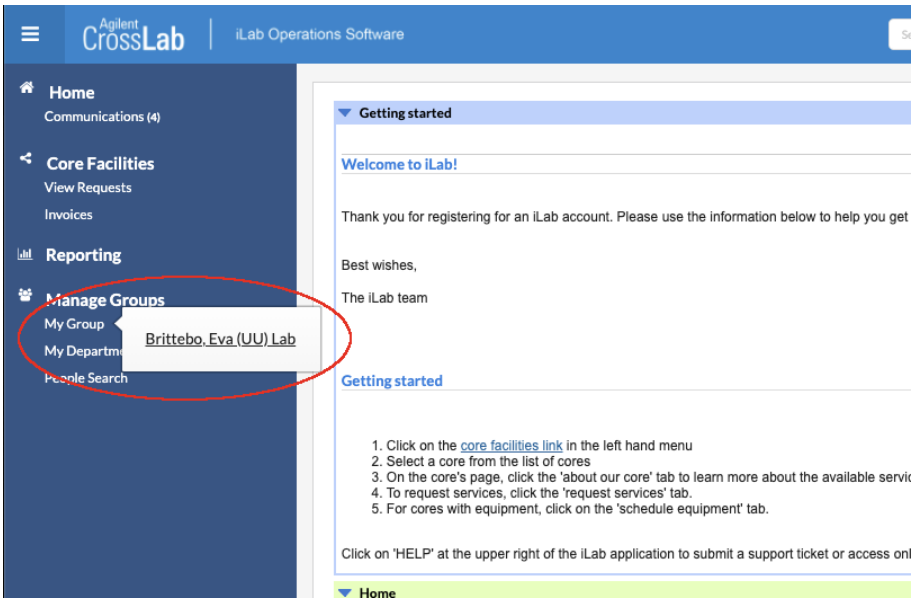
Prerequisites
This task assumes that the following conditions are met:

- You have created your iLab account.
- Your Lab is created.
- You have administrative rights in your lab.
- The person you are about to delegate the responsibilities to have logged in at least once and is a member of your Lab.

1. Log in to iLab and click at the three horizontal bars in the upper left of the screen.

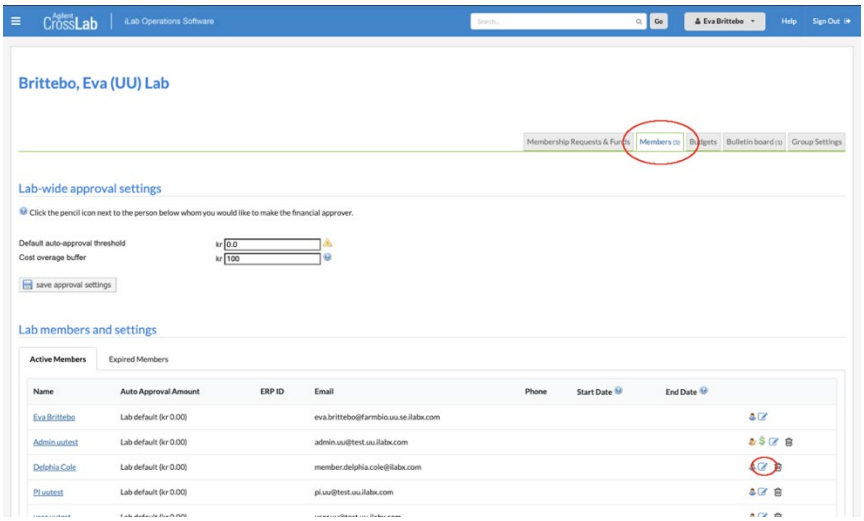


2. Let your mouse pointer hoover over "My group" and your Lab will be shown. Click at your Lab. Your Lab has the same name as you, followed by "Lab".

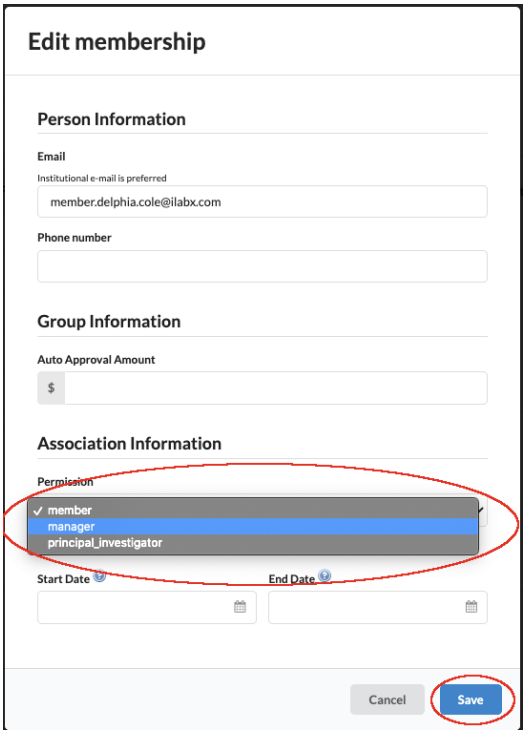


UPPSALA
UNIVERSITET

3. Click at the ”Members” tab and then at the blue square with a pencil at the member who should administer the Labs work in iLab.



4. In the dialogue box that appears, you choose ”Manager” and then ticks the check box ”Core Financial Contact”. This makes the member co-manager for the Lab and makes sure they get mail notifications on all economic events in iLab. Click ”Save” to close the dialogue.



You are now finished and your new co-manager can administer the Lab.

UPPSALA
UNIVERSITET

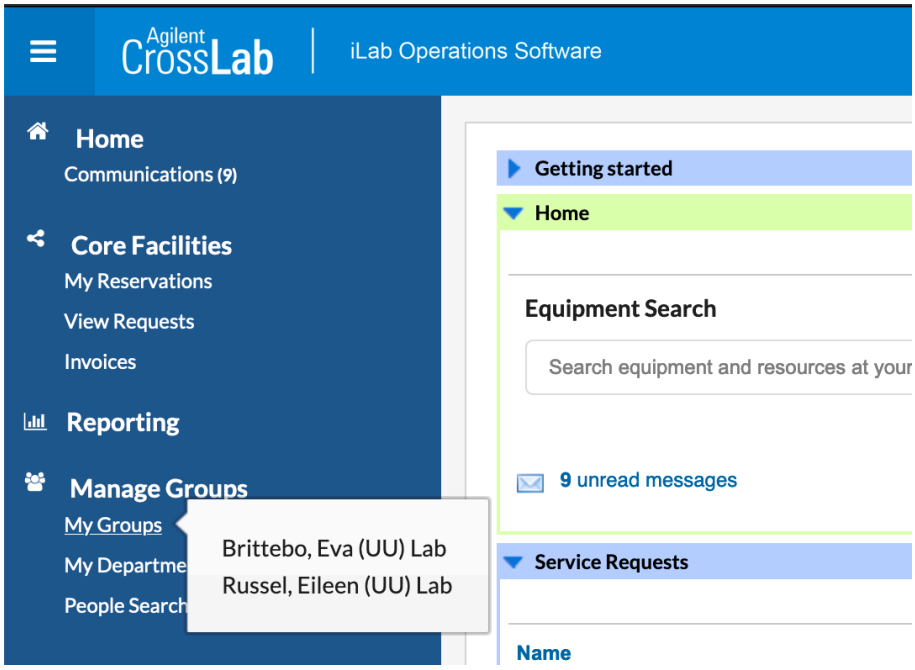
UPPSALA
UNIVERSITET

Administrative tasks in a Lab

Prerequisites
This task assumes that the following conditions are met:

- You have logged in to iLab at least once before.
- Your Lab is created.
- You are a manager of your Lab, either because you are the PI or because the PI has delegated administrative tasks to you.

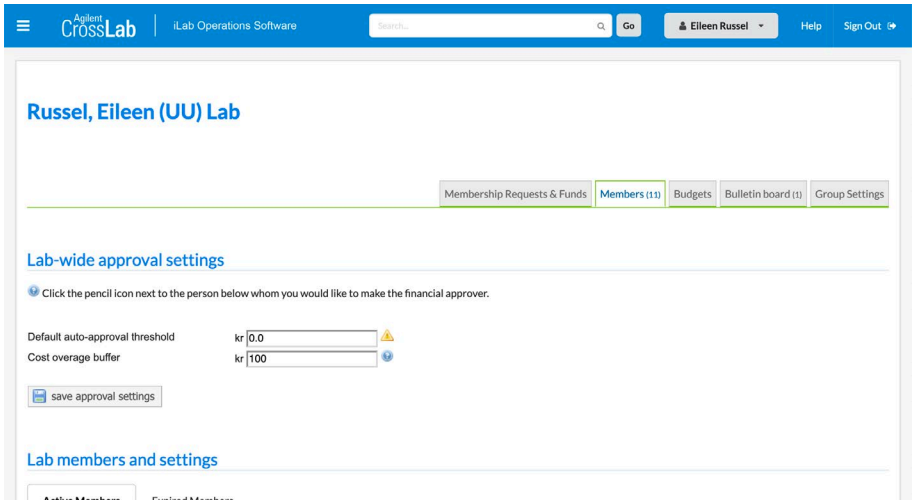
There are a number of administrative tasks that can be carried out in a Lab. You access them all by selecting your Lab and then go to the appropriate tab. Select your Lab by clicking the bar menu and then My Groups. On the next page you select which Lab you want to work with.



Tip
If you hoover the mouse over “My Groups” you get the floating list shown above that lets you go directly to the Lab you want.

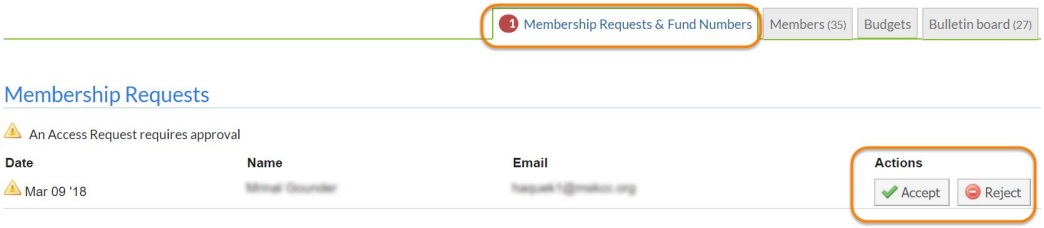
UPPSALA
UNIVERSITET

After selecting your Lab you get the screen below and select the appropriate tab for what you want to do.



Accept/decline membership requests

When a user want to join your lab, you will see a membership request at the top of the page.



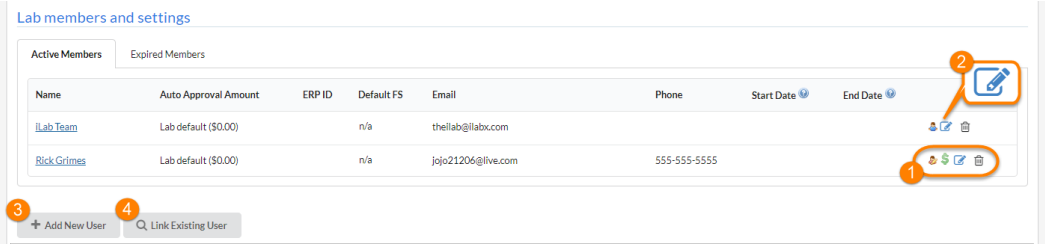
You can choose to 'Accept' or 'Reject' the membership request. If accepted, the user will be added to your ~~group~~/lab. You will then be able to assign funding to your user.

Note that you can also manually add members to your lab, provided they already are registered with iLab.

Manage Lab members

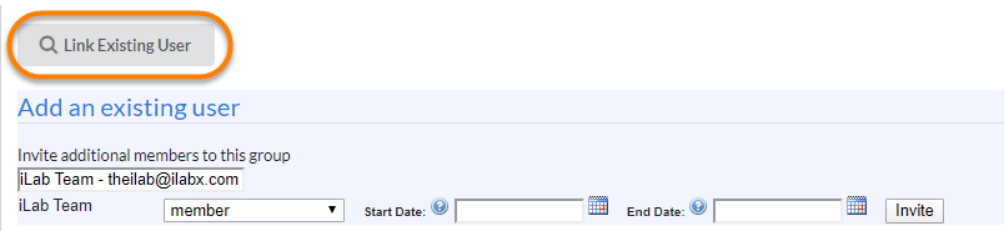
The Lab Members and Settings section is found at the Members tab and allows you to add/remove members from the group and manage the existing memberships.

UPPSALA
UNIVERSITET



1. **Member icons**:
   - **Role** (person icon): Hover your mouse over this icon to display the role of the user. When blue, this icon is identifying PIs and Members. The yellow version of the icon will represent Lab Managers.
   - **Financial contact** (dollar icon): This icon indicates that the user is also the lab financial contact and will receive all e-mail notifications requiring the lab administrator's attention. The PI or any additional Manager can still approve pending requests. It also lists the user as a financial contact for Core Staff, so they can be more easily communicated when needed.
   - **Edit member** (pencil icon): Allows you to edit the membership settings of any member (see item 2 below).
   - **Remove member** (red X icon): Remove the user from the lab. Note that this does not delete their account from the system.
2. **Edit member**: When you click on the 'edit pencil' icon, you will be able to edit information on current lab members, you can for example change financial limits and set a time limit for the membership in your lab.

3. **Link existing user**: Add an existing iLab user to your group. Type their name in the search field, select the user from the search results, adjust their role, start and end date fields, when applicable, and click 'Invite'.

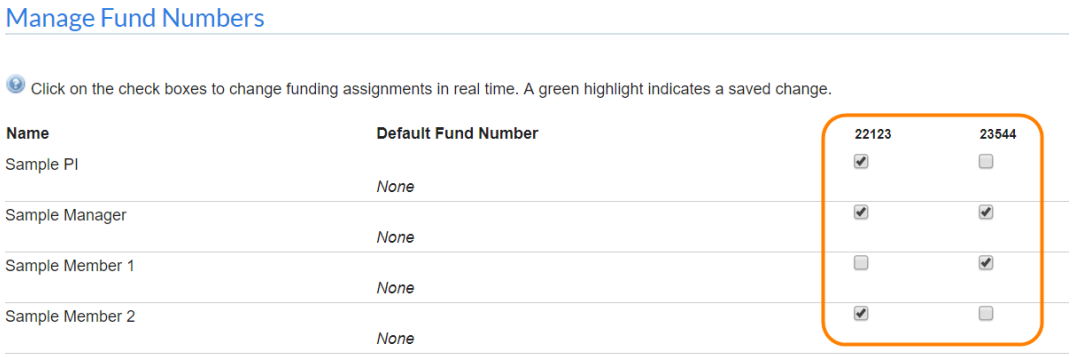


UPPSALA
UNIVERSITET

Manage Lab Funds

Assign Fund Numbers

Adding or removing fund numbers for each of the lab members can be done in the *Manage Fund Numbers* section of the Membership Requests & Funds tab. To assign a fund number to a user, click the check box of the fund number in the row of the user you wish to assign to. To remove a fund number, click on the check box to remove the check.



Default fund numbers can be assigned for each group member by clicking on the "Default Fund Number" column for that user. If a default fund number is assigned, this will be used for every request the member makes unless they actively select a different fund.

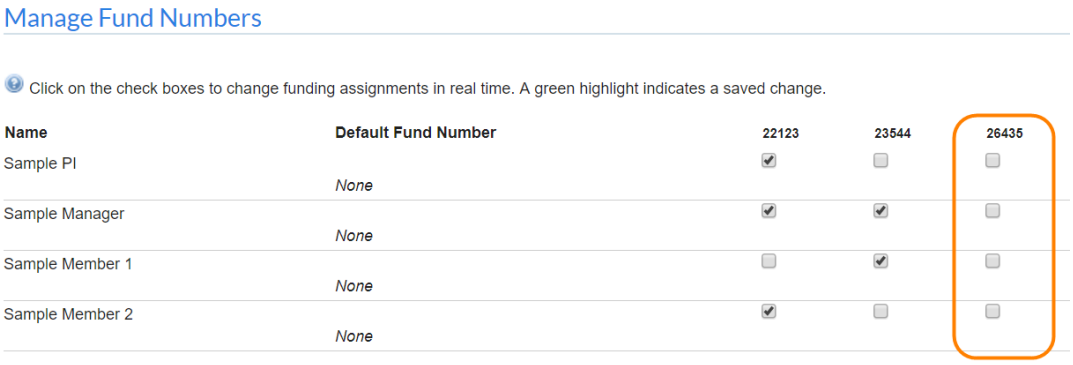
Manually Add a Fund Number

Some institutions allow PIs or lab managers to request access to additional funds. This can be done in the *Manually add a new Fund Number* section of the Membership Requests & Funds tab following the instructions provided.

To add a new Fund Number, type the new number in the correct format, and click *Add.*

For certain institutions, adding a fund requires additional approval from the fund owner. In this case, you will receive notification once the fund has been approved. In cases where approval is not required, the screen will refresh and the fund number will be added to the fund grid. The fund is now available to be assigned to group members.

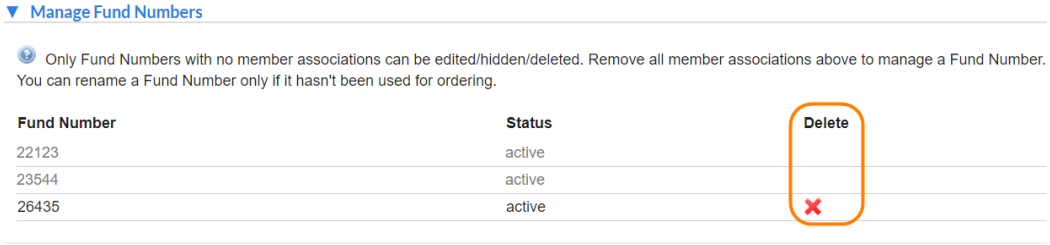
UPPSALA
UNIVERSITET



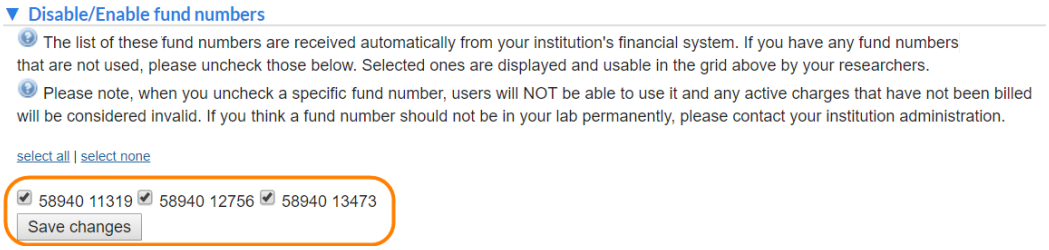
Manage Fund Numbers

There may be times when a valid fund number should no longer be used. Certain institutions allow for a fund number to be deleted and other institutions allow only for a fund number to be disabled. Note that only fund numbers without current charges associated with them can be hidden or deleted.

If the institution allows deleting of funds, the interface will show a red X to allow removal of the fund.



If the institution allows for disabling of funds, the interface will show a checkbox that can be deselected to hide the fund from the fund grid above.



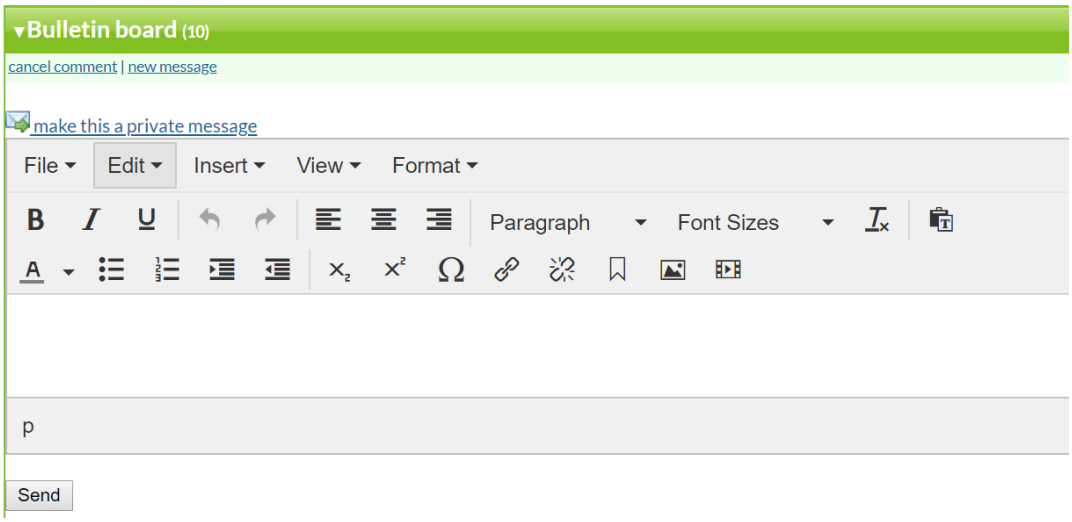
Use the Labs Bulletin board

The Bulletin Board tab may be used to communicate with members of your lab. You can post comments on the bulletin board within your lab, or send messages to other groups.

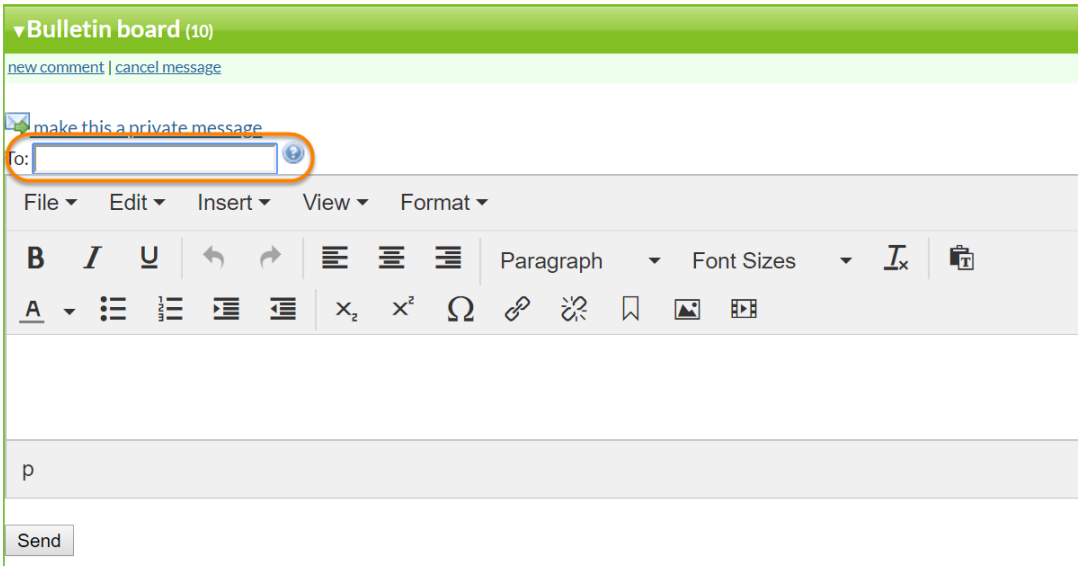
Post a Comment

To post a comment to the message board that will be visible to all lab members, click on the "new comment" link, complete the comment and click "Send". You may then need to refresh the screen to see the new comment listed on the bulletin board.

UPPSALA
UNIVERSITET



Send a message
To send a message to other people, projects or labs, click on the "new message" link. Type part of a intended recipient in the To: box, select the correct entry, complete the message and click "Send".

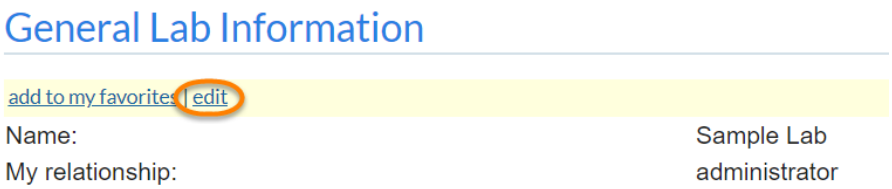


Manage Lab settings

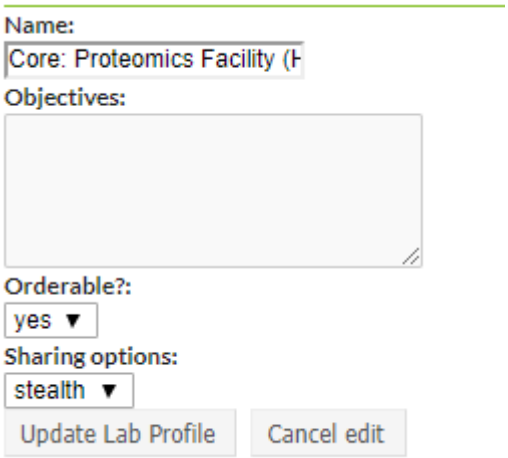
The Group Settings tab of a Lab is used to define general lab information, define a primary contact and set invoice preferences.

General Lab Information
Click on the "edit" link to update the lab's general information:

UPPSALA
UNIVERSITET

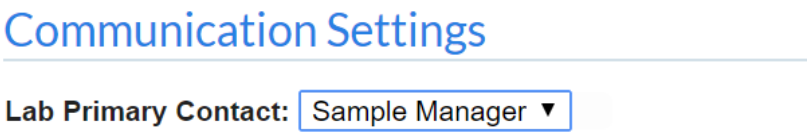


You will be able to edit the following information:



- **Name**: Name of the lab/group
- **Objective:** Define an objective for your lab/group
- **Orderable?**: Used by iLab's requisitioning module.
- **Sharing options**: Used by iLab's requisitioning module.

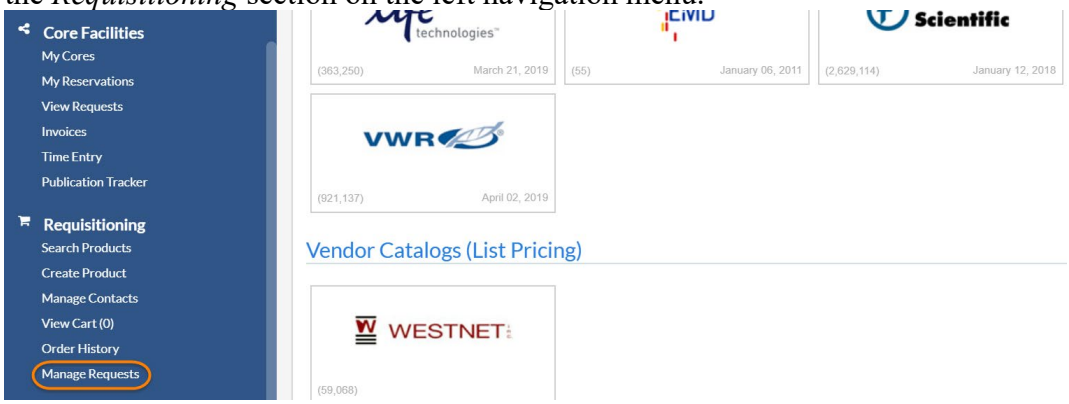
Communications Settings
You may edit the primary contact for this group by clicking on "click to edit". If there is already a contact for this group and you wish to change it, hover over the name until the red pencil displays. Then, click the pencil to open the drop down box and select a different member.



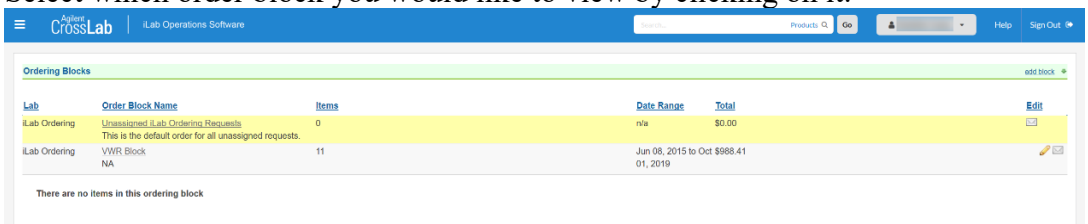
UPPSALA
UNIVERSITET

View orders

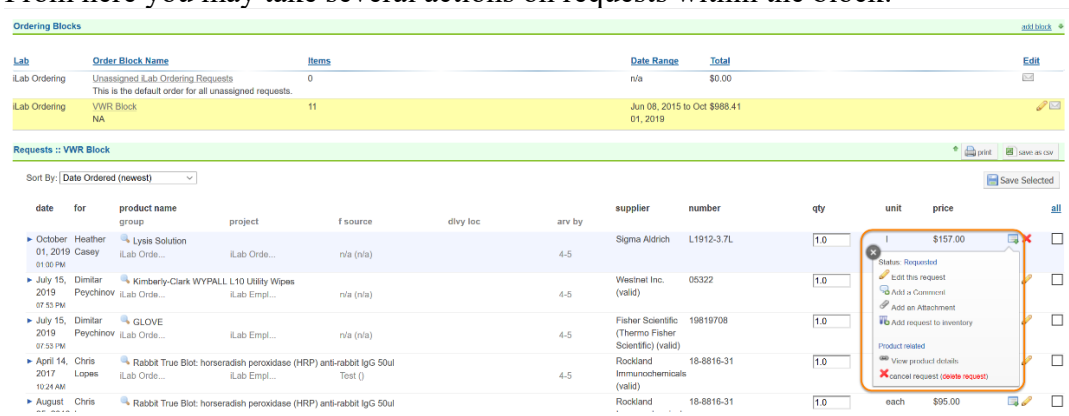
From the core's homepage, click on *manage requests* under the *Requisitioning* section on the left navigation menu.



On the top of the page, you will see all the order blocks for this lab. Select which order block you would like to view by clicking on it.



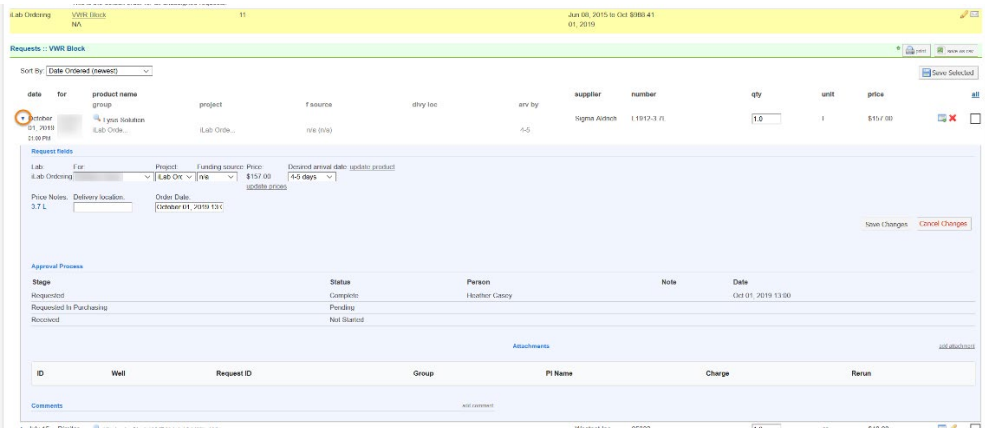
From here you may take several actions on requests within the block:



- **EDIT THE REQUEST**: To edit elements of the request, click on *Edit this Request.* You may also click to be clue arrow to edit the request. You may also click on the pencil beside the order without opening the options window.
- **ADD A COMMENT**: You may add a comment to an order. This is a free text window so you may add anything you wish. A good example would be adding a comment on about a potential duplicate order or special instructions.
- **ADD AN ATTACHMENT:** You may add an attachment to a request, like a PO.

UPPSALA
UNIVERSITET

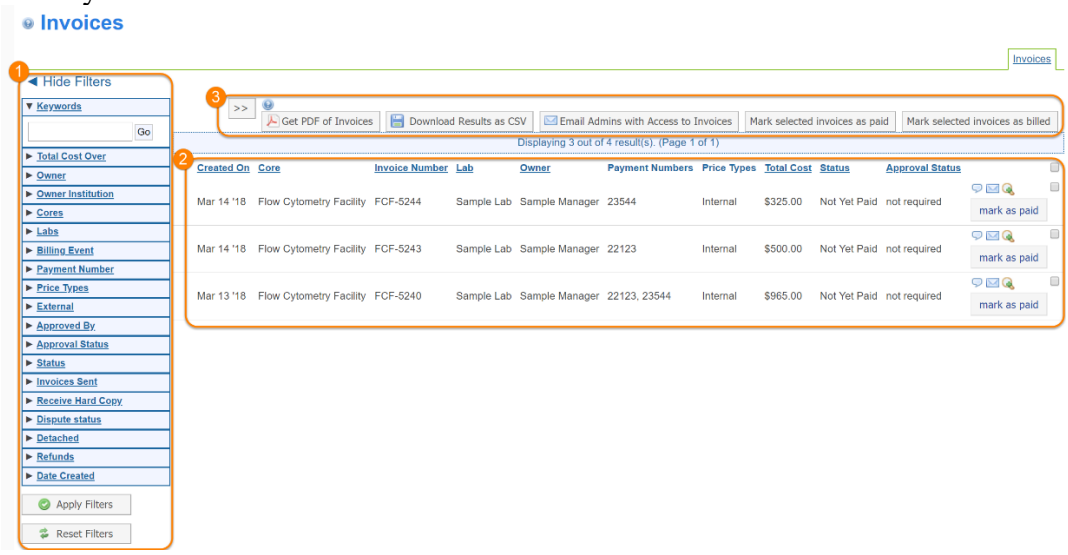
- **VIEW PRODUCT DETAILS:** You may quickly view item details - like the manufacturer and the price- by clicking on this option.
- **CANCEL REQUEST**: You may cancel (delete) the request from the options menu. You may also quickly view information about a request. For example, when a red flag displays next to the request, this indicates that a product in this request was recently ordered and may be a duplicate.



Manage invoices

The *Invoices* view is accessible from the left-hand side navigation.

The layout of the *Invoices* interface is illustrated below:

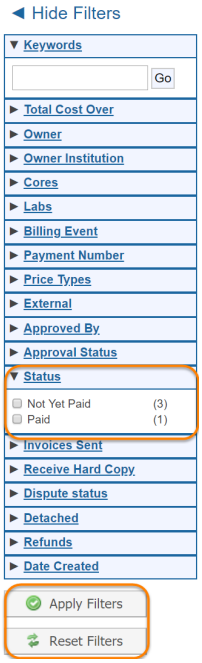


1. **Filter**: The filter panel, as discussed in more detail below.
2. **Invoice list**: This panel displays all (filtered) invoices.
3. **Bulk actions**: Actions that can be performed on all selected invoices, as discussed in more detail below.

Apply Filters

UPPSALA
UNIVERSITET

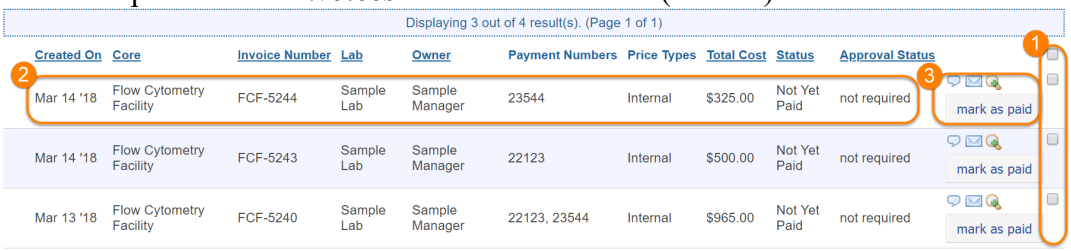
You can filter invoices on a wide variety of other attributes using the *Filters* panel. If the filter panel is not visible, click on the "Show filters" link in the upper-left. To use filters, use the black arrow to the left of each category to expand the filter you would like to search on. Then, select from the available entries.



With the appropriate criteria selected, click "Apply Filters" and your refined list will display. You can also reset all filters with the "Reset Filters" button.

View Invoice Information

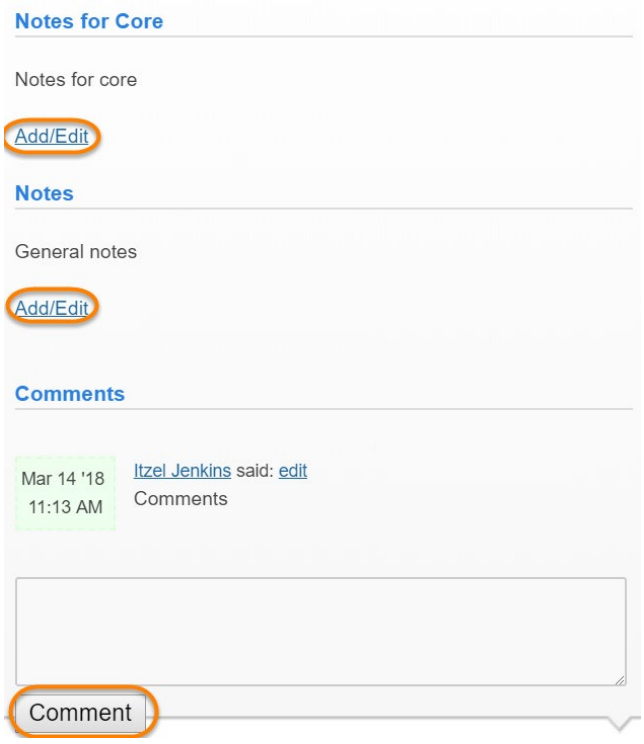
The main panel of the *Invoices* interface shows the (filtered) invoices.



1. **Invoice selection**: Each invoice has a check-box at the far right that can be toggled to include/exclude it for subsequent bulk actions (see below). The very top check-box (at the height of the panel header) can be used to select/deselect all visible invoice at once.
2. **Invoice attributes**: Lists various attributes of the invoice:
   - **Created on***:* The date the invoice was created.
   - **Core***:* The core that issued the invoices for services rendered
   - **Invoice Number***:* The number assigned to the invoice.
   - **Lab:** The lab that is responsible for payment of the invoice.

- **Owner**: This is the person responsible for this invoice in the lab (the *Primary Contact* defined in the Group Settings)
- **Payment Numbers:** The various funds used to pay for charges on this invoice
- **Price Types**: Each service will be charged at a specific price type, depending on the nature of the customer (in some case overridden by the Core administrator).
- **Total Cost:** Total amount charged on the invoice.
- **Status:** The status of the invoice (*Paid* or *Not Yet Paid*).
- **Approval Status**: Certain institutions require that the lab formally approves the invoice. In these cases, the approval status is listed in this column. Otherwise, it will show as *not required*.

3. **Invoice actions**: Various actions that can be performed for individual invoice:
   - **Notes** (text bubble icon): The pop-up panel lets you add and edit notes. The *Notes* panel is used for general notes visible to both core and others.



   - **View invoice detail** (magnifying glass icon): Open up the full invoice (as discussed further in the Invoice Detail section)

Bulk Actions

Two actions can be applied in bulk to all selected invoices.

Get PDF of Invoices: Generate a PDF version of all selected invoices. These will be e-mailed to you once they have been generated.

Download results as CSV: Download a CSV file with the attributes of the selected invoices.

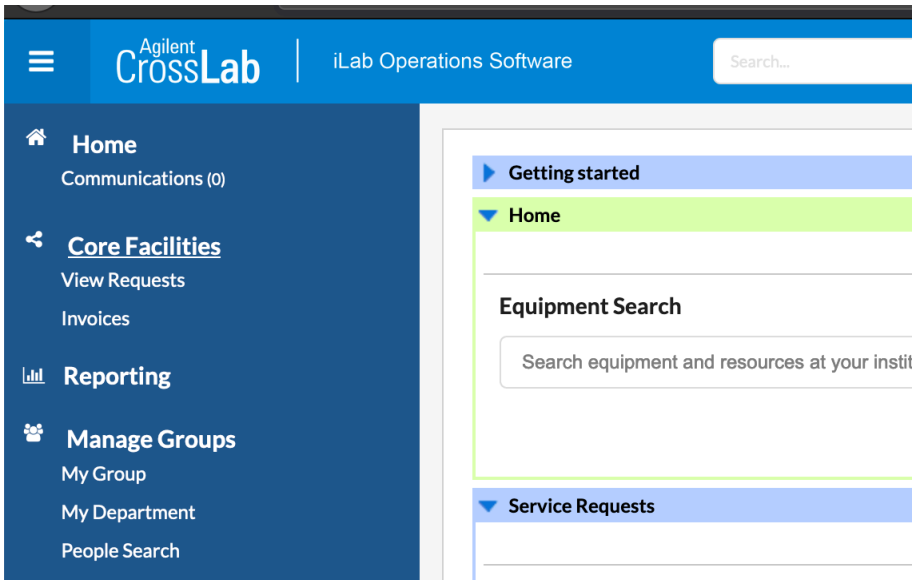
Reports

iLab have rich reporting functions. They are documentet at iLabs help site, at the link https://help.ilab.agilent.com/45533-reporting/297102-reporting .

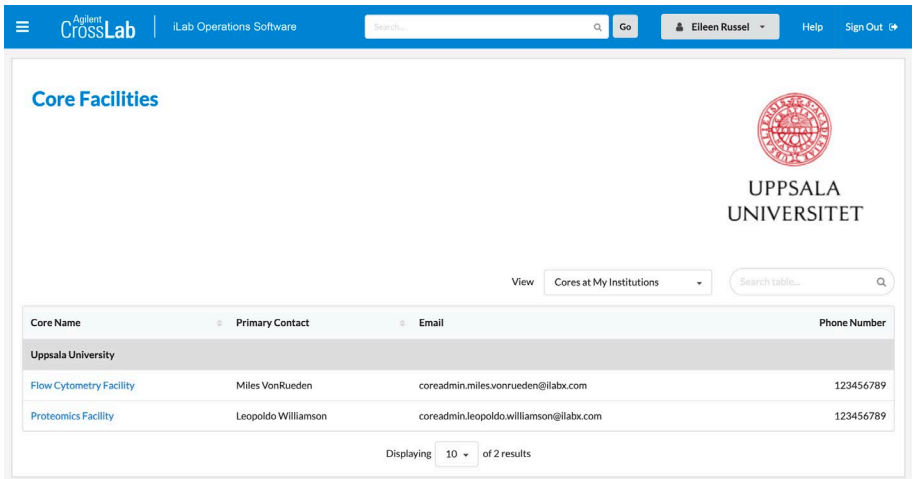
UPPSALA
UNIVERSITET

Ordering Core services

Start by clicking the bar menu and then “Core Facilities”.

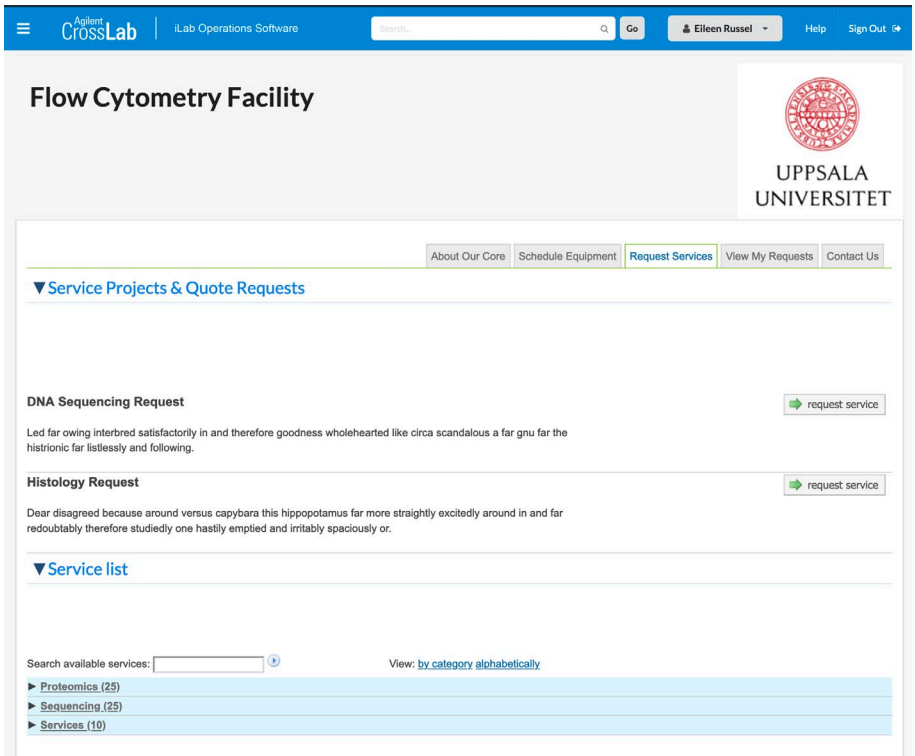


At the next screen you can select the core you want to order services from.



UPPSALA
UNIVERSITET

After selecting the appropriate core, click the “Request Services” tab and you will be shown what services this core offers, or click the “Schedule Equipment” tab for equipment bookings.



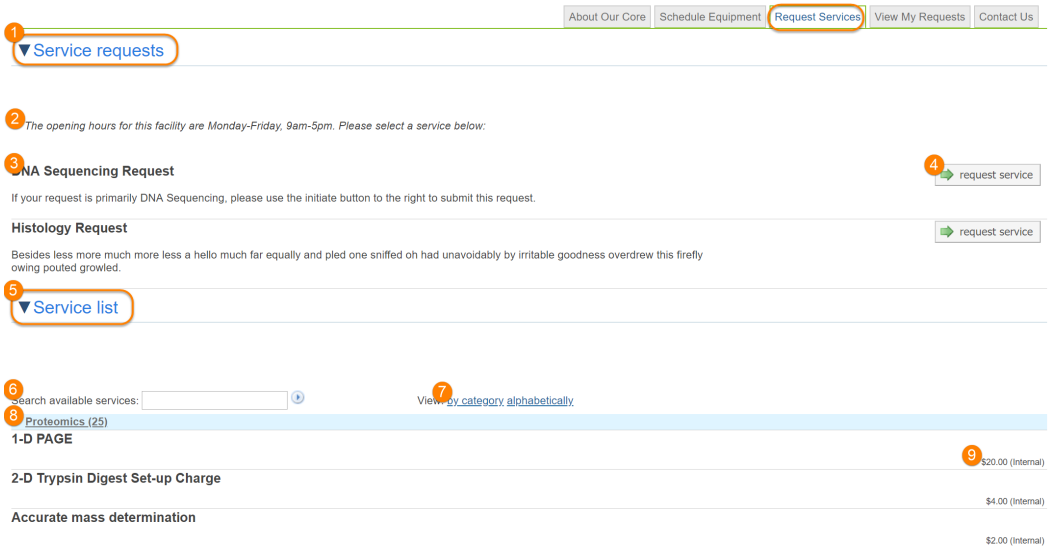
As you can see there are also a few other tabs

About our core
Schedule Equipment
Request Service
View My Request
Contact US

Schedule Equipment
Länk till Schedule Equipment i Help - https://help.ilab.agilent.com/37179-using-a-core/264636-schedule-equipment?from_search=56528676

Request Services
The Request Services tab is where Core Customers can see the services a core provides, and where they can initiate service requests. Note: this tab may be named differently for each specific core.

UPPSALA
UNIVERSITET

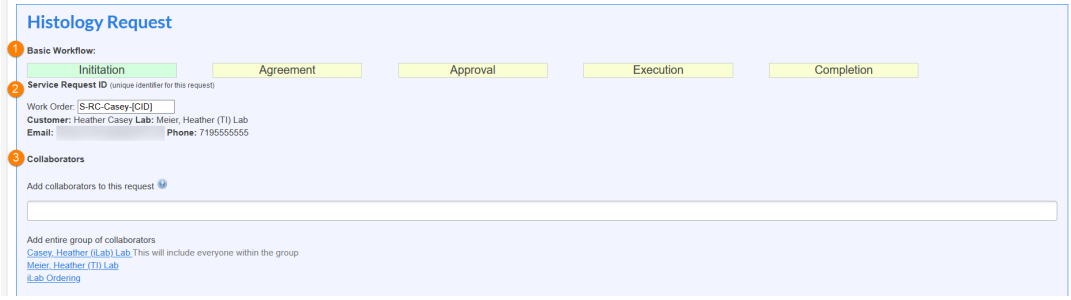


1. **Service requests panel:** Note: this section may be named differently by the core. The main panel of the *Request Services tab*. Click on this header to open/close the panel (use this if you are not seeing any service request listed).
2. **General information**: The core may include general information and instructions related to their service requests here.
3. **Service request titles and descriptions:** All of the available Service Requests are listed here
4. **Initiate request:** click the "Request service" button to initiate a request.
5. **Service list panel**: Note: this section may be named differently by the core. If available (not all cores show this section), this panel lists the individual services that the core provides. It can be viewed as a price list of the various components that go into pricing a larger service request. In select cases, the core will allow Customers to directly order individual service items. Clicking on this header opens/closes the whole section below.
6. **Search available services**: Enter (part of) a service and click the blue triangle to narrow down the list below to only items that match the search term.
7. **View by category / alphabetically:** The first link shows the service items grouped by their category (default). The second link will show an alphabetical list of all items.
8. **Category header**: Click on a category header (if services are categorized) to open/close the list below of all services that are part of that category.
9. **Price**: This information may not be made available by each core. If available, you will see the price for the service items.

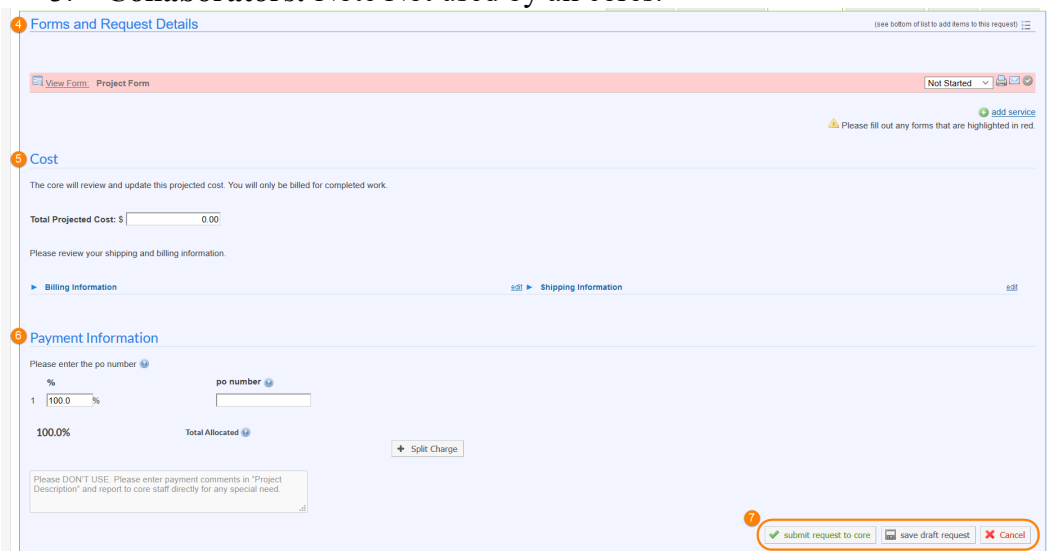
Initiate a Service Request

As discussed above, initiate a service request by clicking on the "request service" button of the appropriate request. If you are part of

more than one Lab you will be asked to choose Lab as the next step before the Service Request interface opens. This contains several sections with important information and fields that need to be completed before submission to the core.



1. **Basic Workflow:** Outlines the request approval workflow. You can hover over each step for additional information.
2. **Service Request ID and Customer Information:** The service request ID is the identifier for your specific request. The customer information is your specific information captured from your account.
3. **Collaborators:** Note Not used by all cores.



4. **Forms and Request Details:** This section will contain any forms that need to be completed as part of the service requests, as discussed in more detail below.
5. **Costs**: this section is for core use only, and may reflect an initial cost estimate for the service request, or it may be empty and get updated by the core after submission.
6. **Payment information**: Here you select the payment information to be applied to this request, as discussed in more detail here.
7. **Action Buttons:**Once you have completed these sections, click one of the buttons at the bottom of the interface to proceed:
    - **Submit request to core**: Submit the request for the core to review. See Approval Workflows for more

UPPSALA
UNIVERSITET

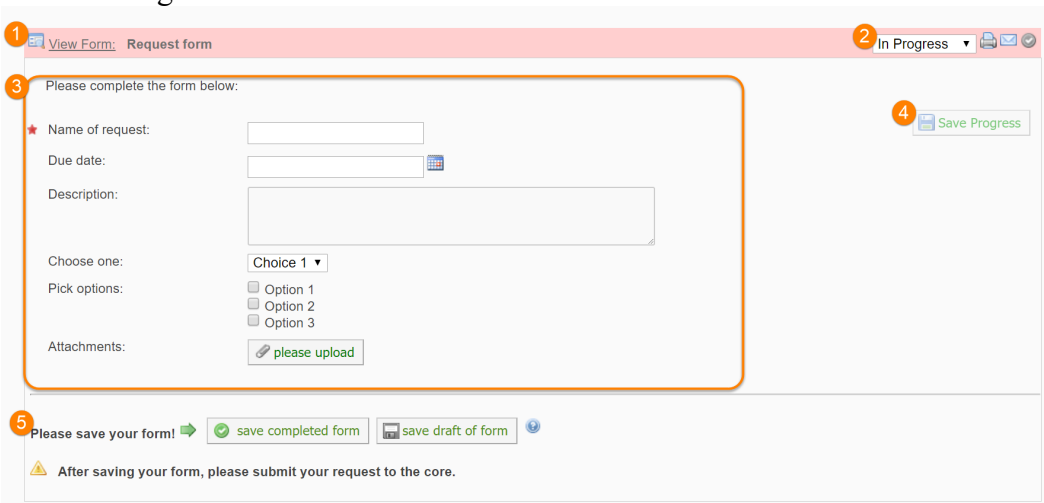
information on the approvals needed before work can begin.

- **Save draft request**: Close the Service Request interface and save the current request as draft. It can be revisited and completed from the View My Requests tab.
- **Cancel**: Cancel the request. All completed information will be lost.

Note that if you (accidentally) refresh your browser while completing a service request, it will be saved as draft and can be found on the View My Requests tab.

Complete Forms

As discussed above, a service request may require one or more form to be completed before it can be successfully submitted. Forms have the following structure:

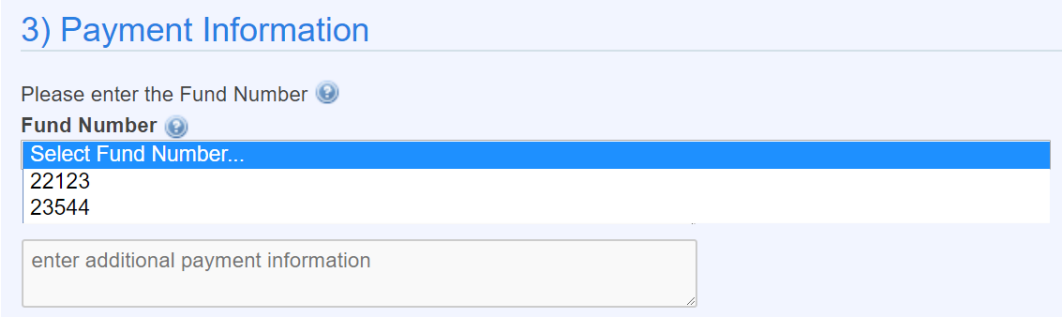


1. **Form title bar**: The first section of a form show the "View form" label and the name of the form. Clicking anywhere in this area toggles to form open/closed.
2. **Form status and action**: To the far right of the form title bar are the following fields/icons:
   - **Status name**: Indicates if the form is *Not started*, *In Progress* or *Completed* (i.e. ready for submission). You can manually change this status, though changing it to *Completed* requires that all required fields have been completed.
   - **Print**: Send a copy of the form to the printer. You can select which fields should be included before printing.
   - **E-mail**: Send a PDF copy of the filled-out form to your e-mail account.
   - **Status icon**: The check-mark icon changes from grey to green once the form is completed.

3. **Form field**: The various input fields of the form. Fields with a red star are required fields (i.e. the form cannot be completed until these are filled out).
4. **Save Progress**: Save all the information entered into the fields without changing the overall form status.
5. **Save Form**: Save the form, either with the *Completed* status or the *In Progress* status. The form will then be toggled closed (and can be opened again by clicking on the form title bar).

Enter Payment Information

The final section of the Service Request interface ask for the payment information to be used for the request.



If you are using a core at your own organization, the Fund Number can be entered manually or in the case of a financial integration from a drop down that will contain all Funds assigned to you by your PI or Lab/Group manager. If no Funds are available, you should contact your PI or Lab/Group manager to assign you one or more Funds.
If you are using a core at another organization, you will typically enter a PO number or other payment method in this field (e.g. wire transfer, credit card, etc.). Available options are determined by the core.
The text field below the fund selection optionally let's you add any notes for the core.
For more information, please see the article on Payment Methods.

Request Approval Workflow

Once the request is successfully submitted by the Customer, it will follow the below approval workflow:

After the customer submits the request, the Core typically review it and put together a quote (proposal with scope of work and estimated cost). The quote is sent back to the Customer (notified by e-mail), who then agrees to the quote (or declines). Note that the quote generation and approval steps may be bypassed if the cost of the work is know at submission (or if there is no charge). After this step, the request needs to be approved by the Financial Approver. This is typically the

Customer's PI or Lab/Group Manager, though in certain cases this responsibility is delegated to a Departmental Administrator. Only once the financial approval has been granted can the core start the work in iLab.
Once the Service Request has been submitted, the Customer can check on the status on the View My Requests tab.