iLab Messaging Overview*

For questions or concerns please contact iLab.Support@pennmedicine.upenn.edu

iLab offers a wide variety of ways to contact your core facility users. Click below to learn more about reaching out from a specific tab within your core facility, or to learn how you may quickly contact users with unpaid invoices.

- **Schedule Equipment Tab**
- **View All Requests Tab**
  - Contacting a user from a specific request
  - Bulk messaging users
- **People Tab**
  - Bulk messaging users
  - Contacting equipment or service users
  - Contacting specific individuals or groups of individuals
- **Billing Tab**
  - Contacting a single user
  - Contacting multiple users
- **How can I quickly contact users with unpaid invoices?**

*Please note that available contact methods may vary based upon your core facility set-up.
Contacting users from the “Schedule Equipment” tab

The “Schedule Equipment” allows you to contact users of a specific piece of equipment. This may be useful to notify users of equipment related delays, availabilities, or upcoming maintenance.

1. Click the “Schedule Equipment” tab, then click “Message Customers.”

2. Select a usage date range for the customers you would like to contact, then select the specific resource. Please note you may also choose to contact users of all equipment within your chosen timeframe by clicking “Select All.” After choosing your date range and equipment, click “Find Customers.”

3. Select the customer(s) you would like to contact or click “All” to message the group.
4. Compose your message and click send. Please note you may include additional email addresses; however these individuals must be registered iLab users. If you include a link in your message, recipients must have appropriate iLab access to view it (for example links to specific iLab requests).

5. Your message will be sent to the selected users, copying your designated core facility contacts.

**Contacting users from the “View All Requests” tab**

**Contacting a user from a specific request**

1. Click the “View All Requests” tab.

2. Locate your desired request and click the conversation bubble that appears on the right-hand side.

3. Choose who you would like to receive the message (researcher, PI, financial contacts, etc.) and compose your message. Please note you may include additional email addresses; however these individuals must be registered iLab users. If you include a link in your message, recipients must have appropriate iLab access to view it (for example links to specific iLab requests). Once you have chosen your contacts and composed your message, click “Send.” You will receive a copy of this message, provided the “Send me a copy of this email” box remains checked.
4. Your message will be sent to the selected contacts and will include a link to the request. A copy of this message will also be placed into the “Comments” section of the request itself for future reference.

**Bulk Messaging Users**

1. Click the “View All Requests” tab, then click “Message Customers.”

2. Select the date range and the services for which you would like to find customers, then click “Click Here to Find Customers.” Please note you may also search for customers by keyword (such as researcher or PI name, request label, etc.) or by project status (completed, cancelled, etc.).
3. Select the customer(s) you would like to email.

2) Select customers to email

4. Compose your message and click “click here to send emails.”

3) Send emails

Contacting users from the “People” tab

The “People” tab displays a list of your core facility customers. You may choose to reach out to all your customers at once, to contact subset using filters, to contact users of specific services or equipment, or to contact a single individual.

Bulk Messaging Users

1. Click the “People” tab.

2. Select the users you would like to contact by checking the box that appears to the right of their name. Please note you may search for a specific set of users by using the filter panel on the left side of the page. Filtering options include a keyword search, date range of user activity, lab, equipment training permissions, and more. In the
example shown below, we have filtered for users from the “Researcher” lab who have been active within the past year.

3. Click “Email people.”

4. Confirm who you would like to receive your message. If an individual should not be contacted, simply uncheck their name within the message window. You may also wish to include the user’s administration, or to contact only the administration without including the user. After confirming the recipients, type your message and click “Send.” A copy of this email will be sent to your inbox, provided the “Send me a copy of this email” box remains checked.
Contacting equipment or service users

1. Click the “People” tab, then click “Advanced Messaging.”

2. Select whether you would like to contact equipment customers or services customers, then click “View.”

3. For guidance on contacting equipment customers, please click [here](#) and following the instructions beginning with Step 2.

4. To contact service customers, select a date range for the customers you would like to contact, then click “Click here to Find Customers.” Please note you may also search for customers by keyword (such as researcher or PI name, request label, etc.) or by project status (completed, cancelled, etc.).

5. Confirm the customer(s) you would like to contact. If an individual should not receive your message, uncheck the box next to their name.
6. Compose your message and click “click here to send emails.” A copy of this message will also be sent to your designated core contacts.

3) Send emails

Contacting specific individuals or groups of individuals

1. Click on the “People” tab.

2. If the individual(s) you wish to contact appear on the first page of results, you may contact them by clicking the envelope icon that appears to the right of their name.

If you wish to contact multiple individuals you may do so by clicking the checkboxes to the right of their names before clicking the envelope icon.
3. If the individual(s) you wish to contact do not appear on the first page of results, you may search for them using the filter panel that appears on the left side of the page. The filter panel allows you to search using a wide range of criteria, including lab, equipment training status, keyword, and more. Enter your desired search criteria, then click “Apply Filters.” In the example below, we have set the filters to locate customers from the “Researcher” lab who have used the Demo Core Facility within the past year.

4. From your results page, select the individual(s) you would like to contact by checking the box to the right of their name before clicking the envelope icon.
You may also choose to contact all users resulting from your search. To do so, click checkbox that appears above your search results. Checking this box will select all users from the first page of your search results. To select users from all your search results, click the “Click here to select all results” link shown below before clicking an envelope icon.

5. After clicking an envelope icon, confirm your email recipients. You may choose to contact the just the users, just the user’s lab administrator, or both. In the example below we have chosen to contact the user as well as their lab administrator. You may choose to include additional email addresses; however these individuals must be registered iLab users with appropriate access to view all content included in your message, such as links to requests or invoices.
6. Compose your message and click “send.” A copy of this email will also be sent to you, provided the “Send me a copy of this email” box remains checked.

**Contacting users from the “Billing” Tab**

**Contacting a single user**

1. Click the “Billing” tab.

2. Click “Invoices” next to the billing event that contains the user you would like to contact.

3. To contact a single user/invoice owner, click the envelope icon that appears to the right of their name.
4. You will be shown a pop-up window. The top of this window displays the most recent message sent to the user via the billing tab (if any).

5. Scroll to the “Send Email” portion of the window, then select your recipient(s). You may choose to contact the invoice owner, their financial manager, their principal investigator, or any combination thereof. You may choose to include additional emails; however these individuals must be registered iLab users with appropriate access to view all content included in your message such as links or invoices.

6. Compose your message and hit “Send.” You will be sent a copy of this email, provided the “send me a copy of this email” box remains checked.

7. Your chosen recipients will receive a copy of the message. The message will contain a PDF attachment of the relevant invoice, as well as a link to the invoice in iLab.

Contacting multiple users

1. Click the “Billing Tab.”
2. Click “Invoices” next to the billing event that contains the users you would like to contact.

<table>
<thead>
<tr>
<th>Name</th>
<th>Created By</th>
<th>Status</th>
<th>Date-Added</th>
<th>Value (in USD)</th>
<th>Authors</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSOM Demo Core (UI/Flens) - January</td>
<td>April Waakley</td>
<td>File sent</td>
<td>Jan 27 22</td>
<td>$605.00 (5)</td>
<td>Remove Invoice</td>
</tr>
<tr>
<td>PSOM Demo Core (UI/Flens) - November</td>
<td>Sheila On</td>
<td>File sent</td>
<td>Nov 21 22</td>
<td>$380.00 (1)</td>
<td>Remove Invoice</td>
</tr>
<tr>
<td>PSOM Demo Core (UI/Flens) - November</td>
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<td>File sent</td>
<td>Nov 18 22</td>
<td>$2,946.36 (43)</td>
<td>Remove Invoice</td>
</tr>
</tbody>
</table>

3. Choose your recipients in the “Bulk Invoice Mailer” section.

4. You may click “Send Invoices” to send users a message with your default core text, or you may check the “Prepend custom message to invoice emails” box to add a custom message.

5. After clicking “Send Invoices” your chosen recipients will receive a copy of the message. The message will contain a PDF attachment of the relevant invoice, as well as a link that the recipient can click to view the invoice in iLab.
How can I quickly contact users with unpaid invoices?

1. Click the three-bar icon in the upper left corner of your iLab homepage, then click “Invoices”

2. You will be shown all invoices for your core or cores from the past year. You may use the left panel filter menu to narrow down your results by institution, lab, total cost etc., or to be shown older invoices (“Date Created”). To filter for unpaid invoices, update the “Status” filter to “Not Yet Paid” and click “Apply Filters.” Please note that if you wish to see unpaid invoices older than 1 year, you must also adjust the “Date Created” filter accordingly.

3. After checking and applying your filers, you may contact the owner of a specific invoice by following these steps. To contact multiple users, click the “Bulk Actions” button on the top right of the page, then “Email Admins with Access to Invoices.”
4. Confirm the invoices you would like to send, as well as who you would like to send them to. You may see additional contacts for each invoice by clicking within the “Select Contacts” field.

5. Compose your message and click “Send message & Invoice PDF.” Please note you may include additional email addresses; however these individuals must be registered iLab users. If you include a link in your message, recipients must have appropriate iLab access to view it (for example links to specific iLab invoices). You will receive a copy of this message, provided the “send me a copy of this email” box remains checked.