

iLab Introduction for Lab PI and BA

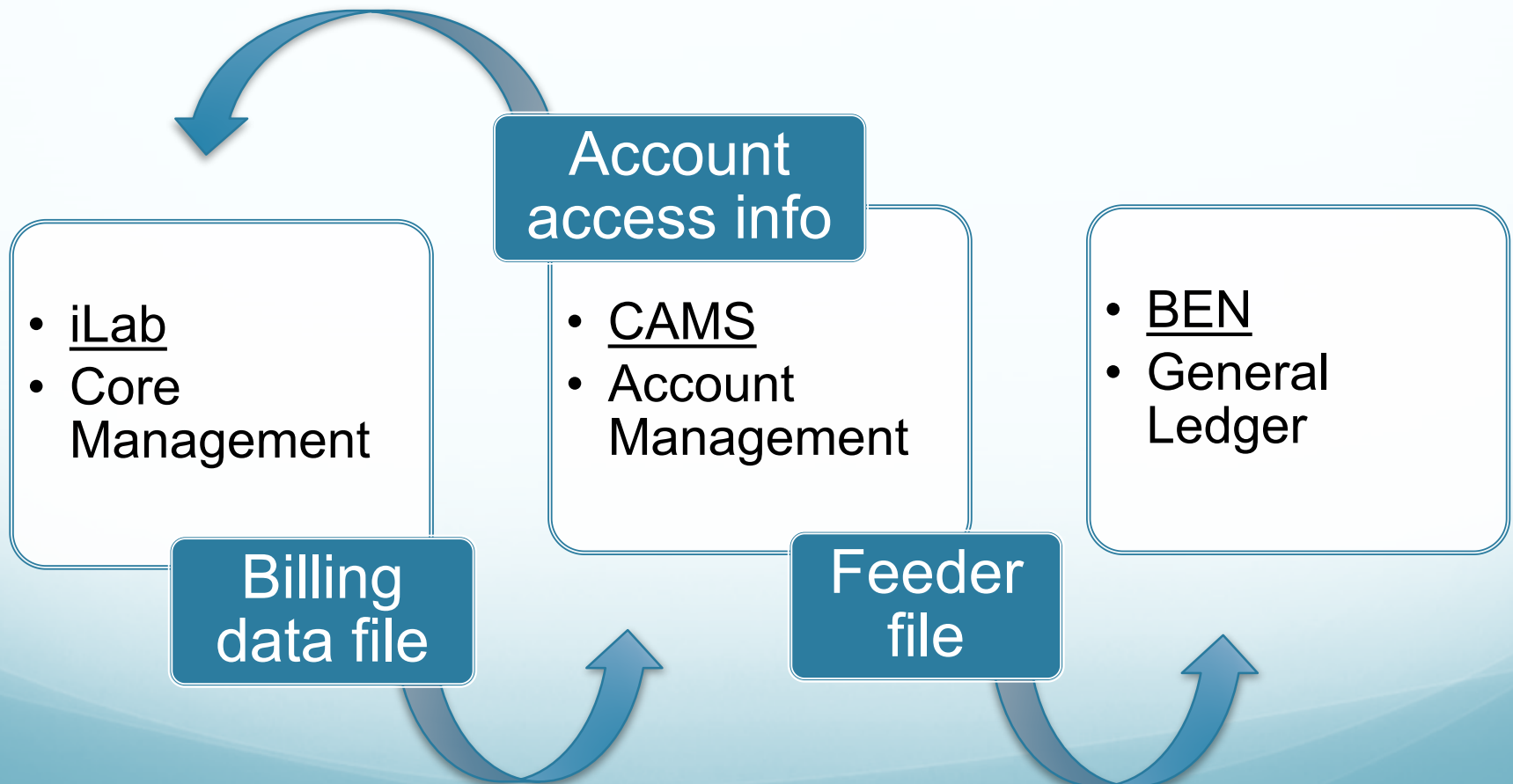


iLab Introduction

- 1) Cores use iLab to manage service requests, equipment scheduling, and billing.
- 2) iLab also maintains research groups, a.k.a. labs. These are listings of PIs and members of their lab, including a list of 26 digit accounts and who has access.
- 3) The 26 digit account access is maintained in CAMS and copied into iLab 'labs' each night.

iLab Introduction

iLab interacts with CAMS, the central account management system.
All fund account access is maintained in CAMS.



iLab Links

Use this link to access iLab:

<https://med-upenn.corefacilities.org/landing/264>

Penn Medicine's iLab website:

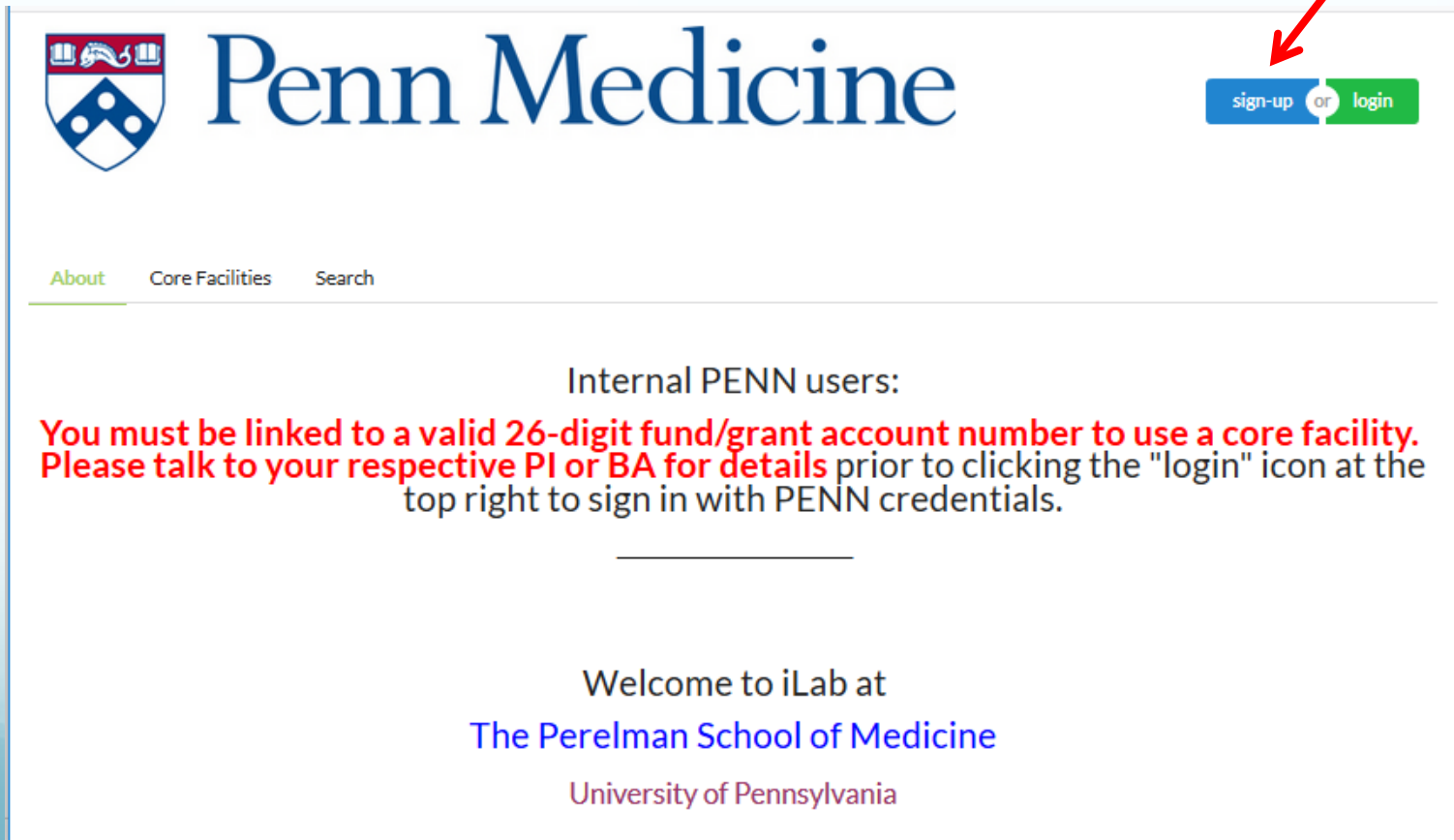
<https://www.med.upenn.edu/dart/financial-and-core-software-management-systems.html>

iLab support email:

ilab-support@agilent.com

New User Registration

To register as a new user, please click the “Sign-up” button and follow the directions.



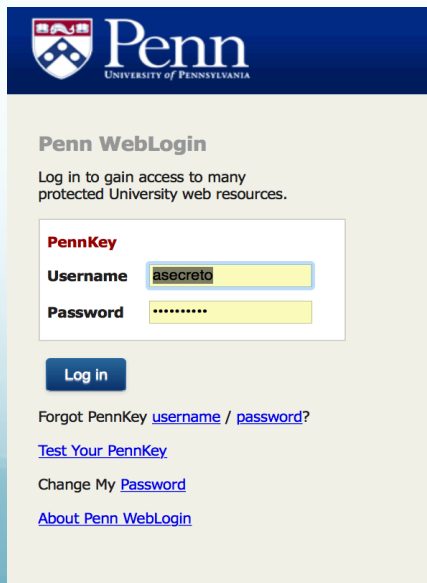
The screenshot shows the Penn Medicine website header. On the left is the Penn Medicine logo, a shield with a red top section containing a white caduceus and a blue bottom section with three white dots. To the right of the logo is the text "Penn Medicine" in a blue serif font. Further right, there are two buttons: a blue "sign-up" button and a green "login" button, separated by a white circle containing the word "or". A red arrow points from the top right of the slide to the "sign-up" button. Below the header is a navigation bar with links for "About", "Core Facilities", and "Search". The main content area contains the following text:

Internal PENN users:
You must be linked to a valid 26-digit fund/grant account number to use a core facility. Please talk to your respective PI or BA for details prior to clicking the "login" icon at the top right to sign in with PENN credentials.

Welcome to iLab at
The Perelman School of Medicine
University of Pennsylvania

Penn User Sign In

To sign into the iLab system, please use your UPenn credentials



The image shows the Penn WebLogin page. At the top is the Penn University of Pennsylvania logo. Below it is the heading "Penn WebLogin" and the text "Log in to gain access to many protected University web resources." The login form has two input fields: "Username" with the value "asecreto" and "Password" with a masked password "*****". Below the form is a "Log in" button. At the bottom are links for "Forgot PennKey username / password?", "Test Your PennKey", "Change My Password", and "About Penn WebLogin".

UPenn credentials are your Penn Key name and password.

In your iLab home page, press the 'menu' icon on the top left to navigate to your lab.

Click the "My Groups" link to open your lab's page.

Agilent CrossLab | iLab Operations Software

Search... Go

Home
Communications (0)

Core Facilities
My Cores
My Reservations
View Requests
View Funds
Invoices

Reporting

Manage Groups
My Groups
My Department
My Cores
University of
People Search

2 - Test (UPenn) Lab
1 - Admin (UPenn) Lab
Mathew, Jiju (UPENN) Lab

Home

Equipment Search
Search equipment and resources at your institutions...

Recently Used Cores
Stem Cell and Xenograft Core
Neurobehavior Testing
Demo Core (UPenn)

Recently Used Equipment
Cell Sorter

2 researchers are seeking access to 2 labs you manage

Lab management in iLab

In your lab, there are options to maintain membership, spending limits, etc.

This user guide highlights key functions important to Penn users.

Complete instructions can be found in the iLab documentation “managing a group”:

<https://help.ilab.agilent.com/36900-managing-your-group/265782-managing-a-group-overview>

How to manage iLab 'labs'

Agilent CrossLab | iLab Operations Software | Search... | Go | Curtis Embree | Help | Sign Out

1 - Admin (UPenn) Lab

Membership Requests & Funds | Members (32) | Budgets | Bulletin board (4) | Group Settings

The following slides review each tab:

- Membership Requests & Funds
- Members
- Budgets
- Bulletin board
- Group Settings

Membership Requests & Funds Tab

Membership Requests appear here. They can be accepted or rejected, and the requestor will be notified by email.

Please **DON'T** maintain fund access in iLab.

This info is downloaded from CAMS nightly.

The screenshot displays the iLab interface for a user labeled "(UPENN) Lab". At the top right, there are navigation tabs: "Membership Requests & Funds" (active), "Members (6)", "Budgets", "Bulletin board (0)", and "Group Settings".

The "Membership Requests" section features a warning icon and the text "An Access Request requires approval". Below this is a table with columns for "Date", "Name", "Email", and "Actions". A single request is listed with the date "Dec 18 '18". The "Actions" column contains "Accept" and "Reject" buttons. A red arrow points from the explanatory text on the left to the "Accept" button.

The "Manage Funds" section includes a "Customize Fund Grid" link and a note: "Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change." There are two filter input fields: "Filter Fund numbers" and "Filter Members".

Below the filters is a table with columns for "Name", "Default Fund", and several checkboxes. The "Default Fund" column shows "None" for all entries. A large red prohibition sign (a circle with a diagonal slash) is overlaid on the table, with a red arrow pointing from the explanatory text on the left to it.

Name	Default Fund				
	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	None	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	None	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Membership Requests & Funds Tab

NEW LAB MEMBER WORKFLOW:

1. A Researcher activates a new user account in iLab.
2. The lab's PI and the lab manager receive an automated email requesting that they "accept" the new member into the lab.
3. In CAMS, the lab's department BA grants the new member access to fund/grant accounts.
4. The account access is copied into iLab overnight.
5. The new member can now enter requests to iLab cores.

More information about CAMS at this link:

<https://www.med.upenn.edu/apps/cams/documentation>

Members Tab

You can set spending limits.

And you can designate lab managers using the edit pencil

You can add Penn users as members to your lab with “link existing user”.

Avoid using the “add new user” button.

Agilent CrossLab | iLab Operations Software | Search... | Go | Curtis Embree | Help | Sign Out

2 - Test (UPenn) Lab

Membership Requests & Funds | **Members (11)** | Budgets | Bulletin board (1) | Group Settings

Lab-wide approval settings

Click the pencil icon next to the person below whom you would like to make the financial approver.

Default auto-approval threshold: \$10000.0
Cost coverage buffer: \$100.0

save approval settings

Lab members and settings

Show expired memberships

Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date	End Date	
Curtis Embree	\$100,000.00		Curtis.embree@penmedicine.upenn.edu	215-746-0582			
George Researcher	Lab default (\$10,000.00)		jennifer.barton+119270@labsolutions.com				
JASON STADANLICK	Lab default (\$10,000.00)		jason.stadanlick@uphs.upenn.edu	215-901-5021			
JEFFREY BRANDIMARTO	Lab default (\$10,000.00)		bjeff@mail.med.upenn.edu	2155731399			
John Breen	Lab default (\$10,000.00)		jbreen@isc.upenn.edu	2155551212			
LIANI SANTINI LOPEZ	Lab default (\$10,000.00)		lsantini@mail.med.upenn.edu	215-573-8417			
MARGARET CHOU	Lab default (\$10,000.00)		choum@email.chop.edu				
Marie Researcher	Lab default (\$10,000.00)		marie.researcher@ilabx.com	123-4567			
SRIRAM KRISHNASWAMY	Lab default (\$10,000.00)		skrishna@penmedicine.upenn.edu	215-590-3346			
William Researcher	Lab default (\$10,000.00)		wresearcher@childrens.harvard.edu				

Members Tab

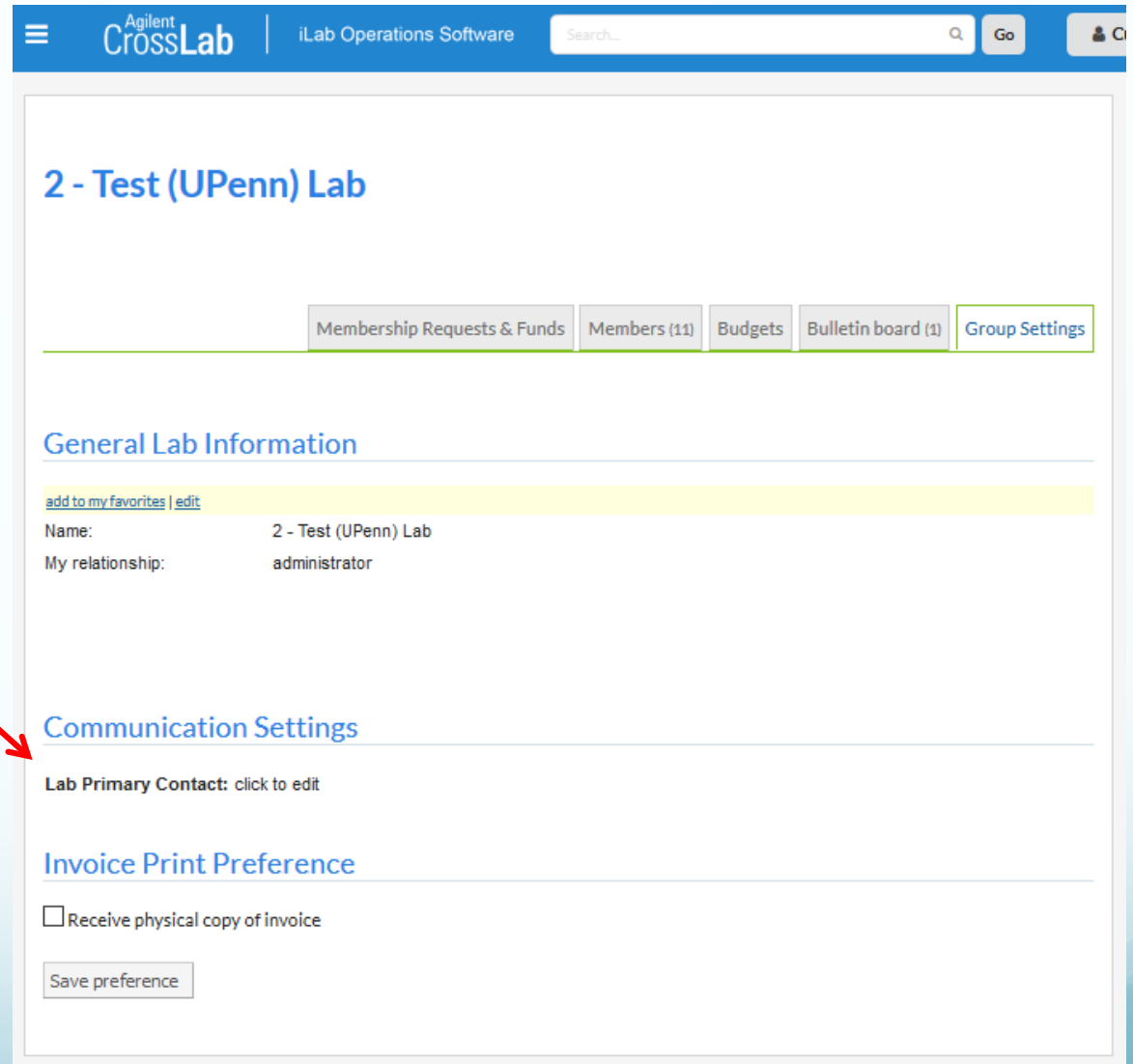
LAB Manager role:

- iLab sends automated emails when an action is required in the lab, for example – accepting a new member.
- By default, the lab PI is also the lab manager and will get the emails.
- There can be more than one manager, **Please assign an additional member** to the manager role. This way, both the PI and the manager get iLab emails and can act on them.

Group Settings Tab

Please keep “Primary Contact” unassigned, as this will enable automated emails to be sent to both the PI and the designated lab manager(s).

More details about each tab can be found in iLab documentation:
<https://help.ilab.agilent.com/36900-managing-your-group/265782-managing-a-group-overview>



The screenshot shows the iLab interface for the '2 - Test (UPenn) Lab'. The top navigation bar includes the Agilent CrossLab logo, 'iLab Operations Software', a search bar, and a 'Go' button. Below the navigation bar, there are tabs for 'Membership Requests & Funds', 'Members (11)', 'Budgets', 'Bulletin board (1)', and 'Group Settings'. The 'Group Settings' tab is active. The page is titled '2 - Test (UPenn) Lab' and has a section for 'General Lab Information' with fields for 'Name' (2 - Test (UPenn) Lab) and 'My relationship' (administrator). Below this is a 'Communication Settings' section with a 'Lab Primary Contact' field (click to edit) and an 'Invoice Print Preference' section with a checkbox for 'Receive physical copy of invoice' and a 'Save preference' button.

Budgets Tab

The Budgets tab provides tools for the PI or group manager to receive alerts based on a member's core-level spending.

The screenshot shows the Agilent CrossLab iLab Operations Software interface. The top navigation bar includes the Agilent CrossLab logo, the text "iLab Operations Software", a search bar, a "Go" button, a user profile for "Curtis Embree", and links for "Help" and "Sign Out".

The main content area is titled "2 - Test (UPenn) Lab". Below the title is a horizontal menu with five tabs: "Membership Requests & Funds", "Members (11)", "Budgets" (which is highlighted with a green border), "Bulletin board (1)", and "Group Settings".

Below the menu is a section titled "Core and Service Center Budgets". This section contains a table with the following columns: "For", "Interval Period", "Start Date", "End Date", "Budgeted \$ Amount", "Budgeted \$ Total", "Recent Spend", "Current Spend", and "Alerts Active?".

For	Interval Period	Start Date	End Date	Budgeted \$ Amount	Budgeted \$ Total	Recent Spend	Current Spend	Alerts Active?
Spending by a member Every member	Monthly	Jan 1, 2018	Jul 1, 2019	0.00				Alerts Active?

At the bottom right of the table area, there is a button labeled "Add a new budget".

Bulletin Board Tab

The Bulletin Board 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.

The screenshot shows the iLab interface for a lab named "2 - Test (UPenn) Lab". The top navigation bar includes the Agilent CrossLab logo, "iLab Operations Software", a search bar, and user information for "Curtis Embree". Below the navigation bar, there are tabs for "Membership Requests & Funds", "Members (11)", "Budgets", "Bulletin board (1)", and "Group Settings". The "Bulletin board (1)" tab is active, showing a "new comment | cancel message" link and a "make this a private message" option. Below these is a "To:" field and a rich text editor with a menu (File, Edit, Insert, View, Format) and various formatting tools like bold, italic, underline, and font size.

More details about each tab can be found in iLab documentation:

<https://help.ilab.agilent.com/36900-managing-your-group/265782-managing-a-group-overview>