



Experimental Tissue Resource (ETR)

iLab User Guide

Revised 11/24/2021

Contents

Register for an iLab Account	2
Registration for Internal (UCI) Users	2
Registration for External (Non-UCI) Users	3
Pre-Registered Internal Users (CFCCC Members)	3
Navigate iLab	3
Request Access to Additional Lab/Group	4
Overview of Using a Core	5
Schedule Equipment	5
Layout of Schedule Equipment Tab	6
Create a Reservation	6
Change or Cancel a Reservation	8
Initiate a Service Request	9
Layout of Request Services Tab	9
Initiate a Service Request	10
Enter Payment Information	11
Manage a Lab/Group (for PIs/Lab Managers)	12
Access & Manage Your Lab/Group	12
Membership Requests & Fund Numbers Tab	13
Members Tab	15

Register for an iLab Account

All users are required to complete a one-time registration; once registered, the system will enable you to place service requests and monitor progress.

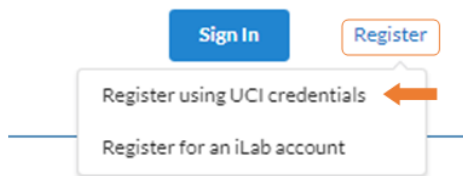
Types of User Accounts:

- Internal Users – Internal users are from UCI and have a UCInetID
- External Users – External users are from other institutions outside of UCI (e.g., non-profits, other UC campuses or academic institutions, industry)

Note: Internal users who are CFCCC Members as of March 1, 2021 have been pre-registered for an iLab account.

Registration for Internal (UCI) Users: To get started, you must register for an account.

1. Navigate to the ETR core page:
https://uci.ilab.agilent.com/service_center/show_external/5738/experimental_tissue_resource_etr
2. In the upper-right-hand corner of the screen select Register and click the Register using UCI Credentials option



3. You will be directed to the DUO authentication page where you will need to enter your UCInetID and password
4. Once you have entered your credentials, click the Login button
5. You will be directed to an iLab Registration page where you will need to i) select your PI/Lab (from a drop-down menu, ii) add your phone number (your name and email address will be pre-filled), and iii) click Register

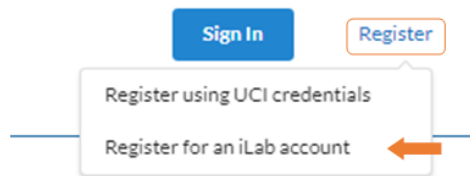
Note: If you are the PI, please send an email to cfccadmin@hs.uci.edu to request the creation of your Lab/Group in iLab.

A screenshot of the 'Register for iLab' form. The form title is 'Register for iLab'. Below the title is a note: 'Fill out all fields to create a new account. Please note that information entered here is for the iLab service.' The form contains five fields: 'PI/Group' (a dropdown menu with the text 'Please select your lab/PI ...'), 'First Name', 'Last Name', 'Email Address', and 'Phone Number'. A blue 'Register' button is located at the bottom right of the form. Three orange callout bubbles with numbers 1, 2, and 3 are overlaid on the form: bubble 1 points to the 'PI/Group' dropdown, bubble 2 points to the 'Phone Number' field, and bubble 3 points to the 'Register' button.

6. Once your registration has been submitted, your PI will receive a notification that you have requested membership to their lab in iLab (they will need to approve your membership and assign any KFS Accounts for your use)
7. Once you receive a notification email that your account has been approved, you can request services from the ETR core

Registration for External (Non-UCI) Users: To get started, you must register for an account. Anyone that does not have a UCI email and does not belong to a UCI PI's lab is considered external.

1. Navigate to the ETR core page:
https://uci.ilab.agilent.com/service_center/show_external/5738/experimental_tissue_resource_etr
2. In the upper-right-hand corner of the screen select Register and click the Register for an iLab Account option



3. You will be asked to provide your institution email address, personal information (name, phone, role), PI contact information, and billing information
 - If your institution and PI already exist in iLab, your account is automatically created
 - If your institution or PI does not exist, your account will be sent to the iLab support team to be approved (allow 24 hours for your account to be reviewed/approved)

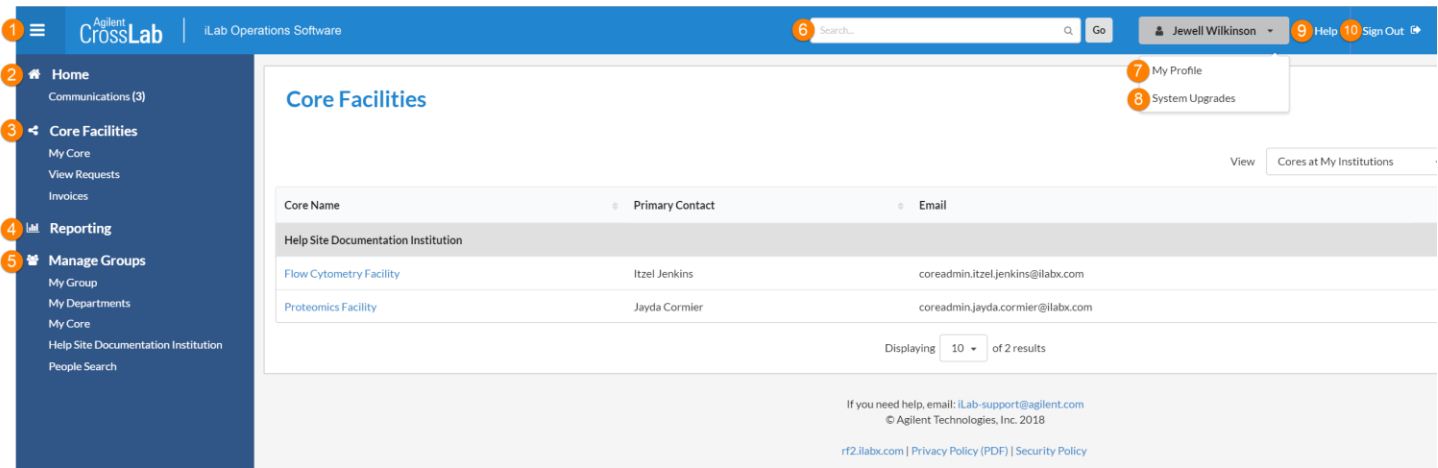
Pre-Registered Internal Users: You have been pre-registered for an iLab account and can sign in using UCI credentials.

1. Navigate to the ETR core page:
https://uci.ilab.agilent.com/service_center/show_external/5738/experimental_tissue_resource_etr
2. Sign in using UCI credentials
3. You will be directed to the DUO authentication page where you will need to enter your UCInetID and password
4. Once you have entered your credentials, click the Login button

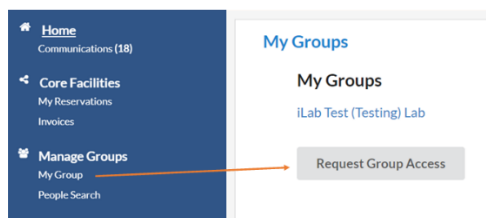
For more information visit [Registering with iLab](#)

Navigate iLab

iLab uses a navigation structure that relies on a left-hand navigation panel (typically hidden) for access to all high-level system areas, combined with several navigation elements at the top of the screen that provide access to various system functions. The main area of the screen contains the currently active interface.



1. **Show/Hide** navigation: The left-hand navigation panel is usually hidden but can be shown (and hidden again) by clicking on the on three horizontal bars at the top left of the screen
 2. **Home**: When you log into iLab, you will automatically be taken to your home page where you can access service requests, messages, and recently used core facilities
 3. **Core Facilities**: Click on this section header to list and search all core facilities at your own institution, as well as at partner institutions and other outside institutions
 - **My Cores**: Visible to core administrators and staff
 - **View Requests**: For PIs and Lab Managers - provides access to all service requests ordered through your Lab/Group
 - **Invoices**: Provides access to all your invoices
 4. **Reporting**: The Reporting interface allows administrators to run reports on all data in iLab
 5. **Manage Groups**: Click on this section header to show a page with all groups, departments, cores and institutions you have access to
 - **My Groups**: provides access to all Labs/Groups of which you are a member and allows you to request access to additional Labs/Groups
- **Request Access to Additional Labs/Groups:**
To request access to additional Labs/Groups, click Request Group Access (grey button) on the My Groups screen.



Complete the required fields in the pop-up window: Institution (University of California Irvine) and Group (PI's last name); Click Request Access (blue button) and an email notification will be sent to the PI requiring approval for member to join the lab.

Request Group Access

Institution*

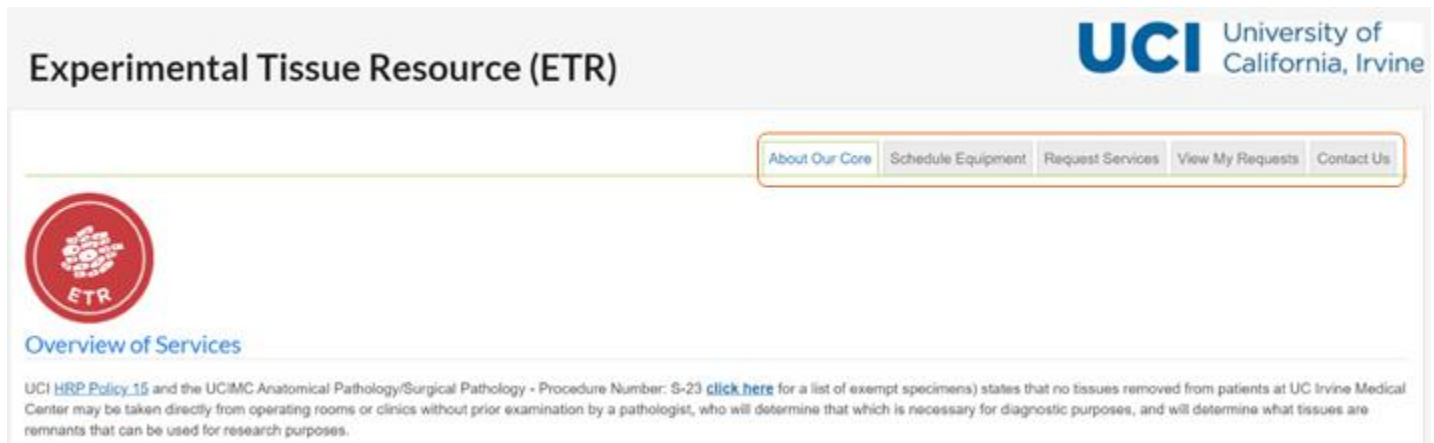
Group*

Note: PI will need to assign member KFS account(s) to use for the requested service(s).

- **My Departments:** visible to institutional administrators
 - **My Cores:** visible to core administrators and staff
 - **People Search:** find people in iLab and perform certain management functions (depending on your role)
6. **Search:** Use this tool to search for specific cores and services (enter a key term and results will display on the page)
 7. **My Profile:** Click here to view and edit your user profile
 8. **System upgrades:** This link gives you access to all messages regarding the system and updates to the iLab software
 9. **HELP:** The Help link brings you to iLab's customer support portal
 10. **Logout:** Click here to logout of the system

Overview of Using a Core

ETR in iLab looks similar to this:



The screenshot displays the Experimental Tissue Resource (ETR) website. At the top right, the UCI University of California, Irvine logo is visible. The main heading is 'Experimental Tissue Resource (ETR)'. A navigation menu includes 'About Our Core', 'Schedule Equipment', 'Request Services', 'View My Requests', and 'Contact Us'. Below the navigation is a red circular logo with 'ETR' inside. The main content area is titled 'Overview of Services' and includes a disclaimer about tissue use for research purposes.

Each Core is organized into tabs across the top of the page (tab names may vary by core). The most common tabs are:

- **About Our Core:** Overview of the core's offerings and various logistical details
- **Schedule Equipment:** Make reservations for the core's resources
- **Request Services:** Request services from the core
- **View My Requests:** View all your requests with the core
- **Contact Us:** Submit a question or comment to the core staff

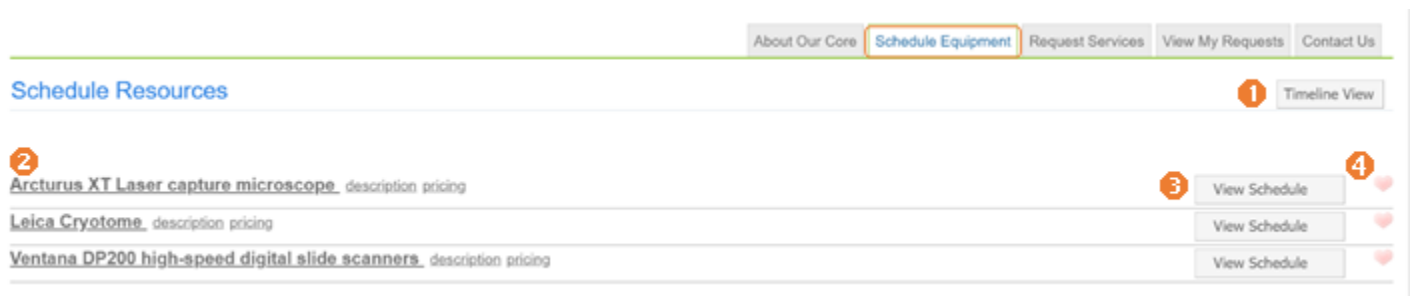
Schedule Equipment

To schedule equipment, you must already be registered in iLab. Once registered, navigate to https://uci.ilab.agilent.com/service_center/show_external/5738/experimental_tissue_resource_etr and sign in (upper right-hand corner of the screen).

The Schedule Equipment tab is where Core Customers can review the schedules of a core's resources and make reservations.

Layout of Schedule Equipment tab

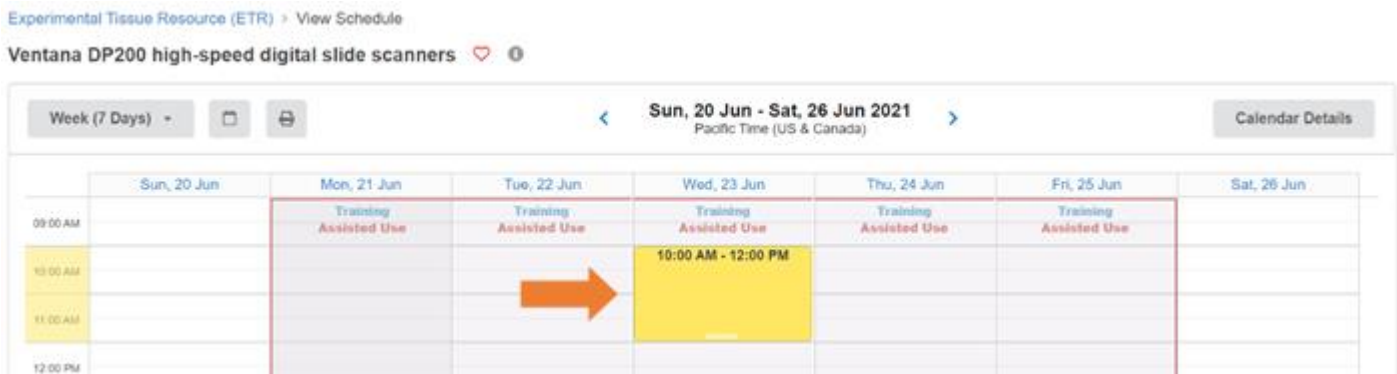
The layout of the Schedule Equipment tab is shown below:



1. **Timeline View:** The timeline button allows for users and core administrators to view all instruments from a birds eye view
2. **Resource header:** The header shows the name of the resource (clicking on the name will open the Schedule, the same effect as clicking the View Schedule button)
To the right of the title are two additional links:
 - o **description:** Provides a description of the resource
 - o **pricing:** Contains pricing for this resource
3. **View Schedule:** Click View Schedule to view the schedule for this resource and make reservation
4. **Favorite:** click on the heart icon to mark this resource as a favorite (for easy reference later)

Create a Reservation

To schedule an event on the calendar, click and drag on the day and time of the intended usage. If you are a member of multiple Labs/Groups, you will first be asked to select the Lab/Group this reservation will be made under.



A pop-up will open with three tabs:

- **General:** The first tab contains important information that will need to be completed to create your reservation (described below)
- **Comments:** The second tab contains all comments that have been added to the reservation by you and/or the core (additional comments can be added by clicking the blue Add a Comment button)
- **Contacts:** This tab contains information about the group that the reservation has been made under

General | Comments | Contacts

1 **Reservation details** Unsaved reservation - click save reservation

For: Ventana DP200 high-speed digital slide scanners - Training \$65.00/hr (All Customers) (needs approval) - My Reservation
 Lab: [Testing \(Agilent\) Lab](#)
 Created on: June 21, 2021 18:06

Event Notes: note visible to anyone Copy notes to the charge and display on the invoice

2 **Times**

	Start	End
Scheduled	Jun 23 2021 10:00 AM	Jun 23 2021 12:00 PM

This event can be modified or deleted before it is approved by the core. Once approved, further modifications may be disallowed.

3 **Use and cost of reservation**

Duration	Effective Rate	Amount	Use Type
2.0 hours	\$65.00	= \$130.00	Training Base Rate
2.0 hours	Total Cost	\$130.00	UCI Users

► Pricing Details

4 **Payment information**

Please enter the po number. You will have the opportunity to review the quote before being billed.

% po number
 1 100.0 %

100.0% Total Allocated

Use the same payment information for all add-on charges

5 **Invite additional people to this event by email**

Please enter a comma separated list of valid email addresses

7

6 **Required forms**
 There are no forms required to make this reservation.

8

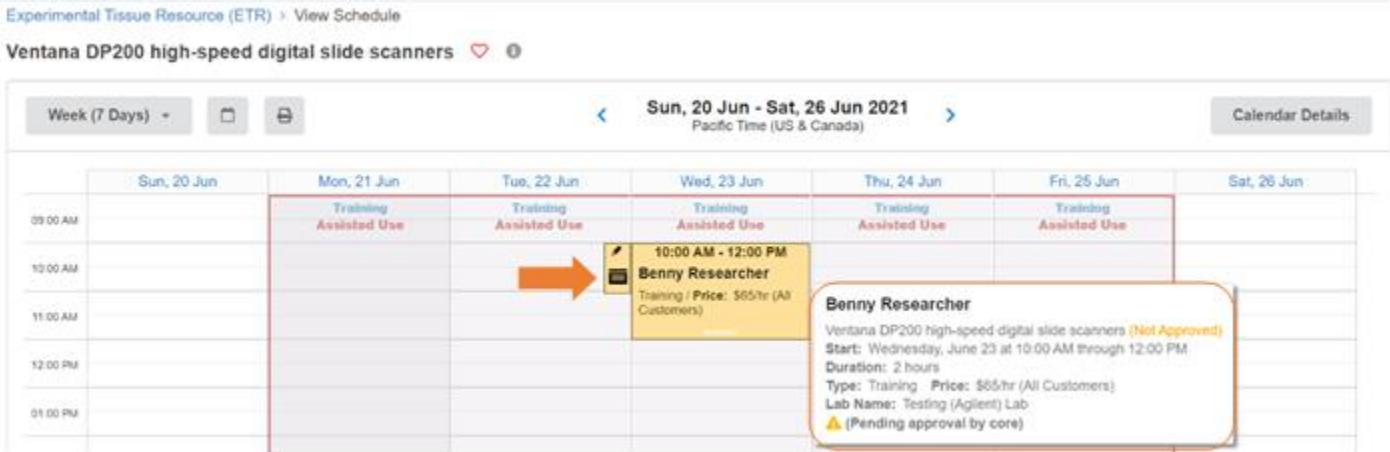
- Reservation details:** Verify key information about the reservation, such as the specific resource, the lab and when it was created
- Times:** Verify the times of the reservation are correct (if you want to make any changes, click on the pencil icon, update the information, and then click the green check mark icon)
- Use and cost of reservation:** Verify the usage type (e.g., assisted or unassisted) and the cost of the reservation (the cost may depend on the selected usage type)
- Payment information:** Select your payment method (internal users - select the Fund from the drop-down; external users - enter a PO number)
- Invite additional people to this event by email:** If you would like to invite others, enter their email address to forward an invite to them
- Required Forms:** If the resource requires you to complete any forms, they will be listed in this panel
- Save Reservation/Cancel Changes:** Click Save Reservation to save the reservation as currently configured or click Cancel Changes to go back to the equipment schedule without saving any changes

Note: the reservation status will appear as Not Approved until the core staff review and approve the reservation.

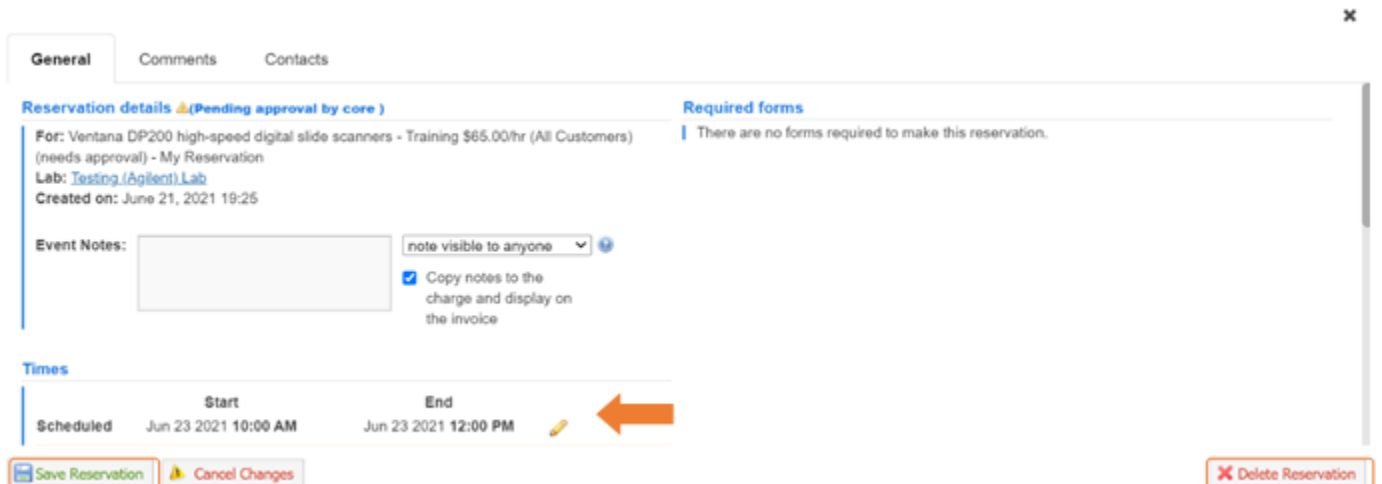
8. **Delete Reservation:** Click Delete Reservation if you would like to completely remove this reservation from the schedule (the reservation will be removed and release the reserved time)

Change or Cancel a Reservation

To change or cancel a reservation, first locate it on the calendar by clicking on the View Schedule button for that equipment.



- Hover over the reservation to view details (date, time, duration, price, etc.)
- Click on the reservation to access the edit menu that appears to the left, then click on the edit menu to make changes or cancel



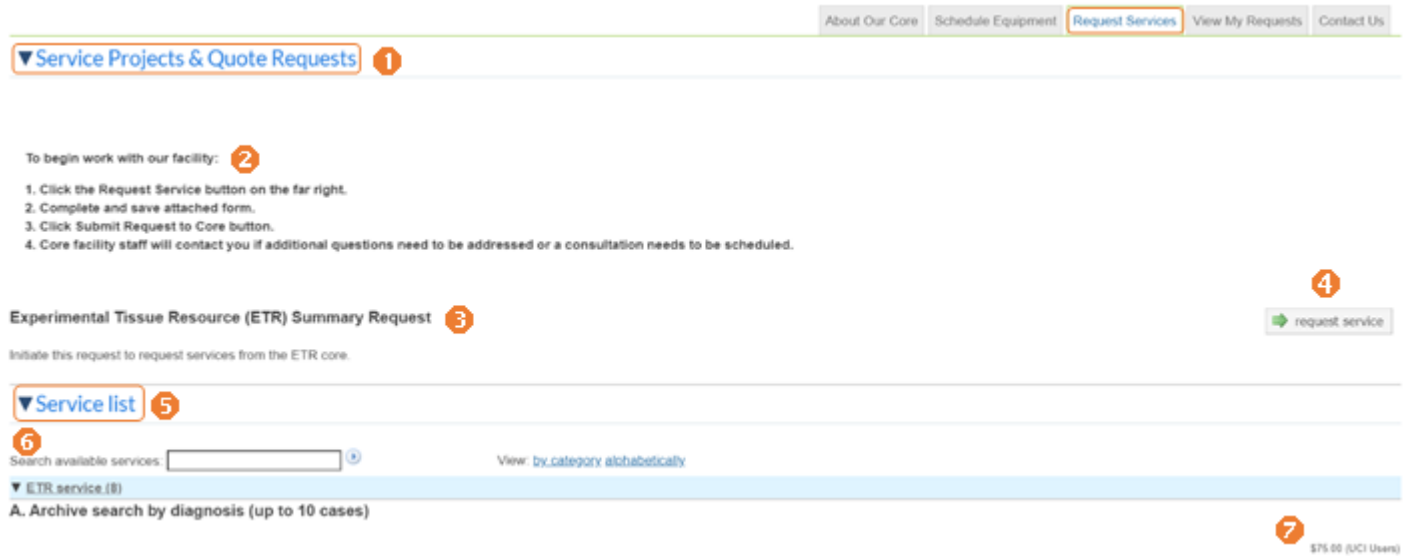
- Click on the pencil icon to change the reservation date and/or time (click Save Reservation to apply the changes)
- To cancel the reservation, click Delete Reservation

Initiate a Service Request

To initiate a service request, you must already be registered in iLab. Once registered, navigate to https://uci.ilab.agilent.com/service_center/show_external/5738/experimental_tissue_resource_etr and sign in (upper right-hand corner of the screen).

Layout of Request Services Tab

The layout of the Request Services tab is illustrated below:



1. **Service Requests panel:** The main panel of the Request Services tab where you can access service information
2. **General information:** General information and instructions provided by ETR related to their service requests
3. **Service request titles and descriptions:** A listing of the available ETR service(s) you can request
4. **Initiate request:** click the Request Service button to initiate a request
5. **Service list panel:** This panel lists the individual services ETR provides along with a price list
6. **Search available services:** Enter a service description (e.g., training) to narrow down the list of services to items that match the search term
7. **Price:** Prices listed by service items

Initiate a Service Request

As discussed above, initiate a service request by clicking on the Request Service button of the appropriate request. This will open the Service Request interface:

Experimental Tissue Resource (ETR) Summary Request

Request Name:
Customer: Benny Researcher Lab: Testing (Agilent) Lab
Email: benny.researcher@testlabx.com Phone:

Is this request cancer-related (e.g. the project is used for cancer research, diagnosis or treatment) OR studies diseases or risk factors that can lead to cancer (e.g. obesity, cirrhosis, NASH, IBD)? [Yes/No]

Forms and Request Details (see bottom of list to add items to this request)

View Form: Experimental Tissue Resource (ETR) Procurement Form - Basic Research	Not Started
Received Date: description: note: click to edit	Not Started
Sent Out Date: description: note: click to edit	Not Started
Reference No: description: note: click to edit	Not Started
Specimen No. description: note: click to edit	Not Started

[add service](#) [add event](#)
⚠ Please fill out any forms that are highlighted in red.

Cost

The core will review and update this projected cost. You will only be billed for completed work.

Total Projected Cost: \$

The interface has two sections:

1. **Forms and Request Details:** This section will contain any forms that need to be completed as part of the service request
2. **Cost:** This section is for core use only and may reflect an initial cost estimate for the service request, or it may be empty and later updated by the core after submission

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
- **Save draft request:** Close the Service Request interface and save the current request as a draft (it can be revisited and completed from the View My Requests tab)
- **Cancel:** Cancel the request (all completed information will be lost)

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

For more information visit [iLab Using a Core](#)

Enter Payment Information

Once the core has approved the submitted Service Request (approved requests will display the Processing status), you can enter payment information from the View My Requests tab.

date	for	service id	status	cost
Jun 22 (Jun 22 2021)	Benny Researcher Testing (Agilent) Lab	ETR(ETR)-BR-16 Experimental Tiss...	Processing Received Date:	\$87.00 (\$87.00)
Jun 16 (Jun 16 2021)	Benny Researcher Testing (Agilent) Lab	ETR(ETR)-BR-14 Experimental Tiss...	Processing Received Date:	\$0.00 (\$0.00)

- Locate the service request(s) requiring payment information
 - 👉 (dollar sign with pencil icon) indicates payment information is missing for the request
 - ✅ (dollar sign with blue check icon) indicates payment information has been provided for the request
- Click on the 👉 (dollar sign with pencil icon) to add payment information in a pop-up window
 - If you are an Internal User, the Fund Number can be selected from a drop-down that will contain all KFS Accounts assigned to you by your PI or Lab/Group manager
Note: If no Funds are available, you should contact your PI or Lab/Group manager to assign you one or more Funds.

- If you are an External User, enter a PO number and any additional payment information in the optional Payment Notes field

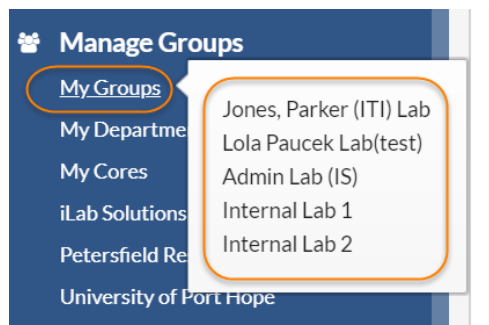
For more information visit [iLab Payment Methods](#)

Manage a Lab/Group (for PIs/Lab Managers)

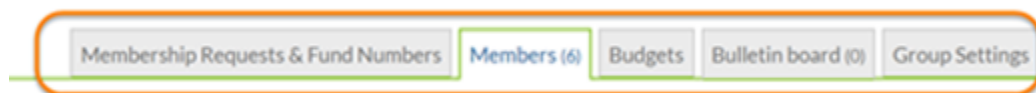
The Lab/Group interface is the central hub for PIs and Lab/Group Managers to manage the Lab/Group members, access to funding, monitor budget and modify various settings. In iLab, every user must be a member of at least one Lab/Group to be able to request services and make reservations.

Access & Manage Your Lab/Group

To access your group, either hover over the My Groups link on the left-side navigation and then select the lab from the pop-up or click on the My Groups link and then select the lab from the list on the next page (if you have only one group, clicking the link will take you straight there).



To manage your lab/group, utilize the various tabs across the top of the iLab screen (described in detail below):



Membership Requests & Fund Numbers Tab

The layout of the Membership Requests & Fund Numbers tab is illustrated below:

The screenshot shows the 'Membership Requests & Fund Numbers' tab selected in the top navigation bar. Below the navigation bar, there are four numbered sections:

- 1 Membership Requests**: A green checkmark indicates 'No Access Requests require approval'.
- 2 Manage Fund Numbers**: Includes a link to 'Customize Fund number Grid' and a note: 'Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.' Below this are two filter input fields: 'Filter Fund Number numbers' and 'Filter Members'. A table follows with columns for 'Name', 'Default Fund Number', and three fund numbers: 22123, 23544, and 26435. The table contains four rows of sample data with checkboxes for each fund number. At the bottom of the table, it says 'Showing 1 to 4 of 4 entries' and has navigation buttons for 'First', 'Previous', '1', 'Next', and 'Last'.
- 3 Manually add a new Fund Number**: A link to add new fund numbers.
- 4 Manage Fund Numbers**: A link to manage fund numbers.

- 1. Membership Requests:** Accept or decline users that are looking to become members of your lab
- 2. Manage Fund Numbers:** The main purpose of this interface is to assign/unassign access to funds for each of your group members (the Fund Grid)
- 3. Manually add a new Fund Number:** This interface lets you add new fund numbers to your Research Group

- **Accept/Decline Membership Requests**
During the registration process, users can select the PI they work with. When a user selects you as their PI, you will see a membership request at the top of the page.

The screenshot shows a membership request card. At the top, the 'Membership Requests & Fund Numbers' tab is selected. Below the navigation bar, there is a warning icon and the text 'An Access Request requires approval'. The request card has columns for 'Date', 'Name', and 'Email'. The date is 'Mar 09 '18', the name is 'Michael Dsouza', and the email is 'michael1@medrx.org'. To the right of the card is an 'Actions' box with two buttons: 'Accept' (with a green checkmark) and 'Reject' (with a red minus sign).

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.

- **Assign/Unassign Fund Numbers**

Adding or removing fund numbers for each of the lab members can be done in the Manage Fund Numbers section of the tab. To assign a fund number to a user, click the check box of the fund number in the row for that user. To remove a fund number, uncheck the box for that user.

Manage Fund Numbers

Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

Name	Default Fund Number	22123	23544
Sample PI	<i>None</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Manager	<i>None</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sample Member 1	<i>None</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sample Member 2	<i>None</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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**

Manually add a new KFS Account

Enter a valid KFS Account. KFS Account is a unique value of seven alphanumeric characters. Please check with your PI or Fiscal Officer for a valid KFS Account if you are unsure.

Title	Account	Project
<input type="text"/>	<input type="text"/>	<input type="text"/>
KFS Account: <input type="text"/> <input type="button" value="Add"/>		

To add a Fund Number, type the new information in the correct format:

- **Account:** 2 alpha, 5 numeric (e.g., SP12345)
The account must exist in KFS. If it does not, your fiscal officer can provide this information.
- **Project:** Project refers to the Project Code in KFS (this is an optional field)
The project must match what exists in KFS. Please contact your fiscal officer for more information.
- **Title:** account title of the KFS account (this is an optional field)
The title has a max of 50 alphanumeric characters.
- **KFS Account:** autogenerated when Account and Project fields are completed; click Add to add the fund number

Manage Fund Numbers

Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

Name	Default Fund Number	22123	23544	26435
Sample PI	<i>None</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sample Manager	<i>None</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Member 1	<i>None</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Member 2	<i>None</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Members Tab

In the Members tab you can set financial auto-approval thresholds, add new users and manage current memberships to your group.

The layout of the Members tab is illustrated below:

The screenshot shows the 'Members' tab interface. At the top, there are navigation tabs: 'Membership Requests & Fund Numbers', 'Members (7)', 'Budgets', 'Bulletin board (3)', and 'Group Settings'. The 'Members (7)' tab is selected and highlighted with an orange circle. Below the navigation, there are two main sections:

- Lab-wide approval settings:** This section includes a note: 'Click the pencil icon next to the person below whom you would like to make the financial approver.' It features two input fields: 'Default auto-approval threshold' set to '\$ 50000.0' and 'Cost overage buffer' set to '\$ 100.0'. A 'save approval settings' button is located below these fields.
- Lab members and settings:** This section has two tabs: 'Active Members' and 'Expired Members'. The 'Active Members' tab is selected. It displays a table with the following columns: Name, Auto Approval Amount, ERP ID, Email, Phone, Start Date, and End Date. The table lists four active members: Jewell Wilkinson, Abdul Walker, Nathanael Dickinson, and Domenico Carroll. Each row includes a 'Lab default (\$50,000.00)' for the auto-approval amount and an email address. Below the table, there are two buttons: '+ Add New User' and 'Link Existing User'.

1. **Lab-wide approval settings:** Set the financial approval thresholds for the group altogether
2. **Lab member and settings:** Add/remove users from the group and manage their current memberships

- **Set Approval Thresholds**

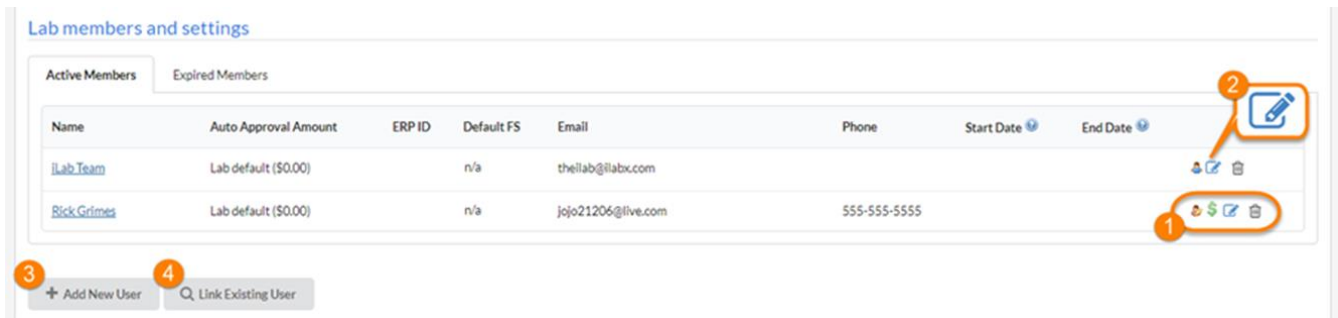
Financial approvals are required from lab administrators when the cost of the service requests submitted by the members exceeds the auto-approval threshold. You can adjust your lab auto-approval threshold in the Lab-Wide Approval Settings section.

This is a close-up of the 'Lab-wide approval settings' section. It includes the same note as the full screenshot: 'Click the pencil icon next to the person below whom you would like to make the financial approver.' The input fields for 'Default auto-approval threshold' and 'Cost overage buffer' are clearly visible, with values of '\$ 5000.0' and '\$ 100.0' respectively. The 'save approval settings' button is also present.

- **Default auto-approval threshold:** The maximum cost of a service request that can be automatically approved
Note: The UCI default auto-approval threshold is \$5000.
- **Cost overage buffer:** The amount that a service request can go over the original agreed-upon cost before a notification is sent to the lab administrators
Note: The UCI-default cost overage buffer is \$100.

- **Manage Memberships**

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



1. Member icons:

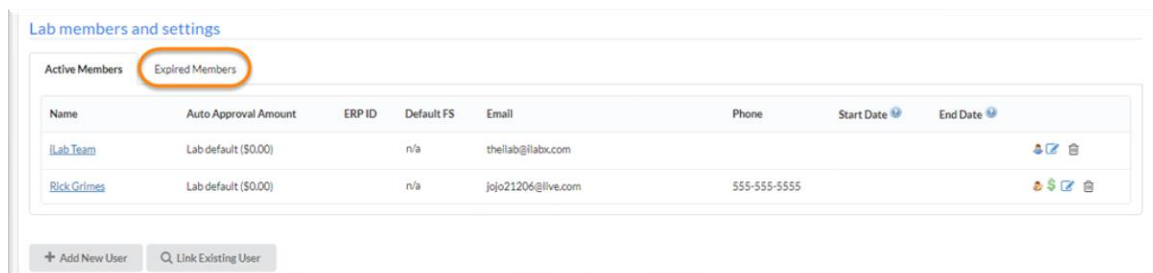
- **Role** (person icon): Hover your mouse over this icon to display the role of the user
 - 👤 (blue icon) represents PIs and Members
 - 👤 (yellow icon) represents Lab Managers
- **Financial contact** (dollar icon): This icon indicates the user is also the lab financial contact and will receive all e-mail notifications requiring the lab administrator's attention

Note: The PI or any additional Manager can still approve pending requests.
- **Edit member** (pencil icon): Allows you to edit the membership settings of any member (see item 2 below)
- **Remove member** (trash icon): Allows you to remove the member from the lab (this does not delete their account from the system)

2. Edit member: When you click on the pencil icon, you will be able to adjust:

- **Email:** iLab communications for this user are sent to this e-mail address
- **Phone number:** Contact phone number for the user

- **Auto-approval Amount:** Overrides the lab default auto-approval threshold and sets different limits per member, at your discretion
- **Permission:** This drop-down specifies the role of the lab member (e.g., Member, Manager or Principal Investigator)
- **Can order?:** Not enabled for UCI
- **Core Financial Contact?:** Email notifications are sent to this member
- **Start Date:** The start date for the user as a member of the lab
If set to a point in the future, the user will not be associated with the lab until the start date. This can be used to set up lab members in advance without giving them access until their start date. When left empty, the user will be active immediately.
- **End Date:** The end date for the user as a member of the lab
After the end date, the user will be removed from the lab and will not be allowed to pay for services using any lab fund. When left empty, the membership will have an indefinite duration.
Note: For expired users, outstanding charges will still follow the normal billing process. To review or reactivate expired memberships, click on the Expired Members tab.

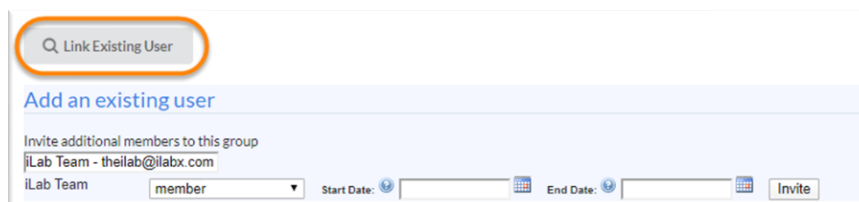


- **Save/Cancel:** Use this to save or cancel any change made to membership settings

3. **Add new user:** Not enabled for UCI

4. **Link existing user:** Add an existing iLab user to your group

Type the user's name in the search field, select the user from the search results, adjust their role, start and end date fields (if applicable), and click Invite.



For more information visit [iLab Managing a Group](#)