Optical Biology Core (OBC)/
Self-Use Facility & Nonlinear Optical Microscopy Lab
iLab User Guide
Revised 11/24/2021

Contents

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.
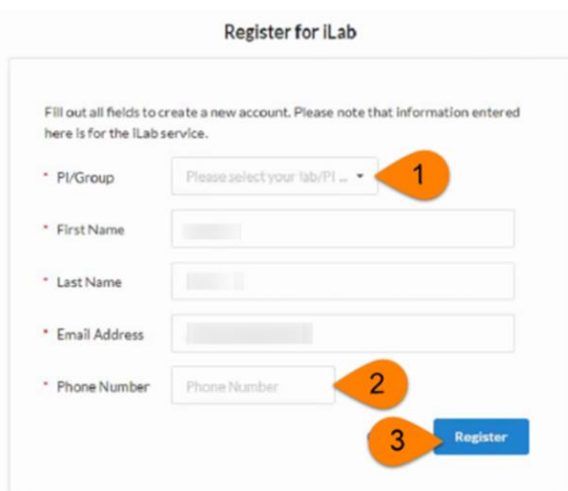
Registration for Internal (UCI) Users: To get started, you must register for an account.
1. Navigate to the OBC core page: https://uci.ilab.agilent.com/service_center/show_external/5721
2. In the upper-right-hand corner of the screen select Register and click the Register using UCI Credentials option
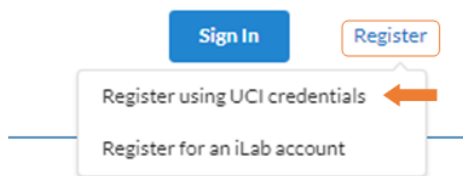
3. You will be directed to the DUO authentication page where you will need to enter your UCInetID and password
4. Once you have entered your credentials, click the Login button
5. You will be directed to an iLab Registration page where you will need to i) select your PI/Lab (from a drop-down menu, ii) 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 cfcccadmin@hs.uci.edu to request the creation of your Lab/Group in iLab.

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 OBC 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 OBC core page: https://uci.ilab.agilent.com/service_center/show_external/5721
2. In the upper-right-hand corner of the screen select Register and click the Register for an iLab Account option
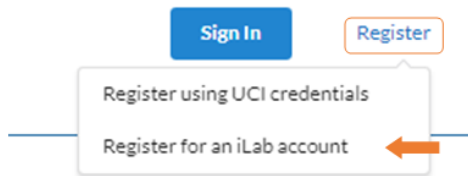
3. You will be asked to provide your institution email address, personal information (name, phone, role), PI contact information, and billing information
   ▪ If your institution and PI already exist in iLab, your account is automatically created
   ▪ If your institution or PI does not exist, your account 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 OBC core page: https://uci.ilab.agilent.com/service_center/show_external/5721
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.
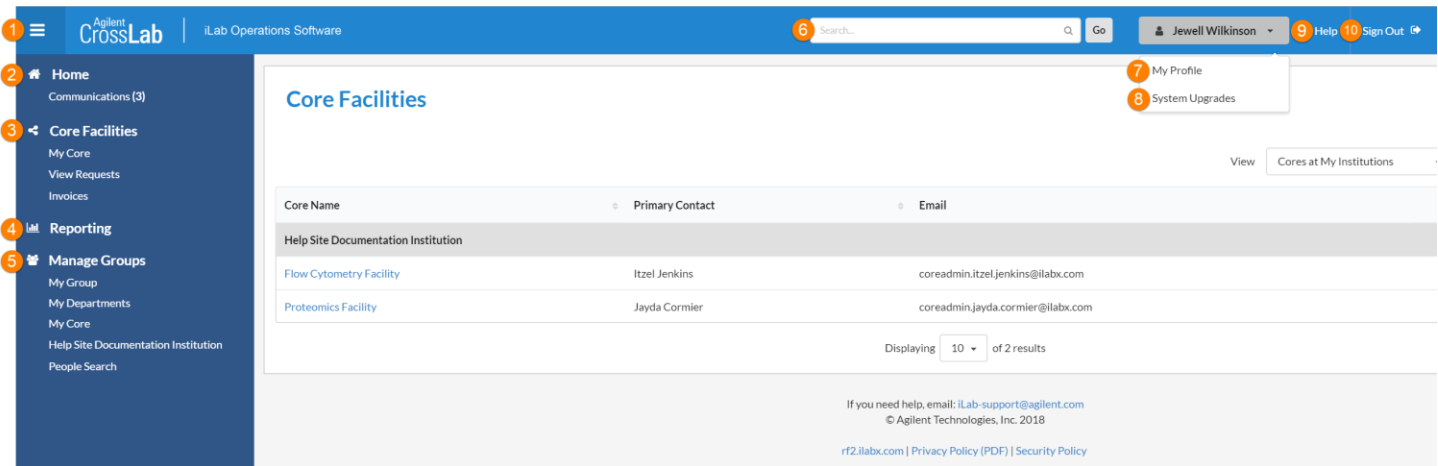
1. **Show/Hide** navigation: The left-hand navigation panel is usually hidden but can be shown (and hidden again) by clicking on the on three horizontal bars at the top left of the screen

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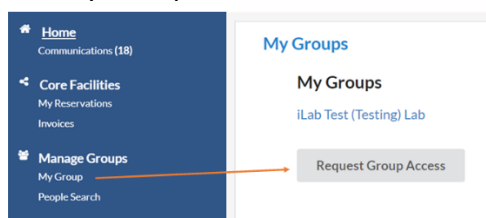
      Complete the required fields in the pop-up window: Institution (University of California Irvine) and Group (PI's last name); Click Request Access (blue button) and an email notification will be sent to the PI requiring approval for member to join the lab.

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

OBC in iLab looks similar to this:

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/5721 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.

<u>Layout of Schedule Equipment tab</u>

The layout of the Schedule Equipment tab is shown below:

1. **Kiosk**: iLab Kiosk is an advanced module that allows a facility to track users' time on instruments. This
    interface allows users to use their credentials to login and start an existing reservation or to create a
    walkup session on an open instrument (if the core allows for walkup sessions). Kiosk is described in
    greater detail in the next section.
2. **Timeline View**: The timeline button allows for users and core administrators to view all instruments
    from a birds eye view.
3. **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
4. **View Schedule**: Click View Schedule to view the schedule for this resource and make reservation (for
    trained and authorized users only)
5. **Request Training**: Users not authorized to schedule a reservation should click Request Training to be
    trained (you will be redirected to the Request Services tab (described in the next section) to submit a
    Training/Assisted Use Request)
6. **Favorite**: click on the heart icon to mark this resource as a favorite (for easy reference later)

Create a Reservation

Before you can create a reservation, you must have been trained to utilize the equipment and be authorized to make reservations. If you are not authorized, please contact the core manager or select Request Training (described below).

> **Note**   ✖
> You are not authorized to create or edit reservations. Please contact your core manager if you need to do so.

- Schedule an Event on the Calendar

  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

1. **Reservation details**: Verify key information about the reservation, such as the specific resource, the lab and when it was created
2. **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)
3. **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)
4. **Payment information**: Select your payment method (internal users - select the Fund from the drop-down; external users - enter a PO number)
5. **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
6. **Required Forms**: If the resource requires you to complete any forms, they will be listed in this panel
7. **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
8. **Cancel Reservation**: Click Cancel Reservation to cancel the reservation and release the time slot for other users.

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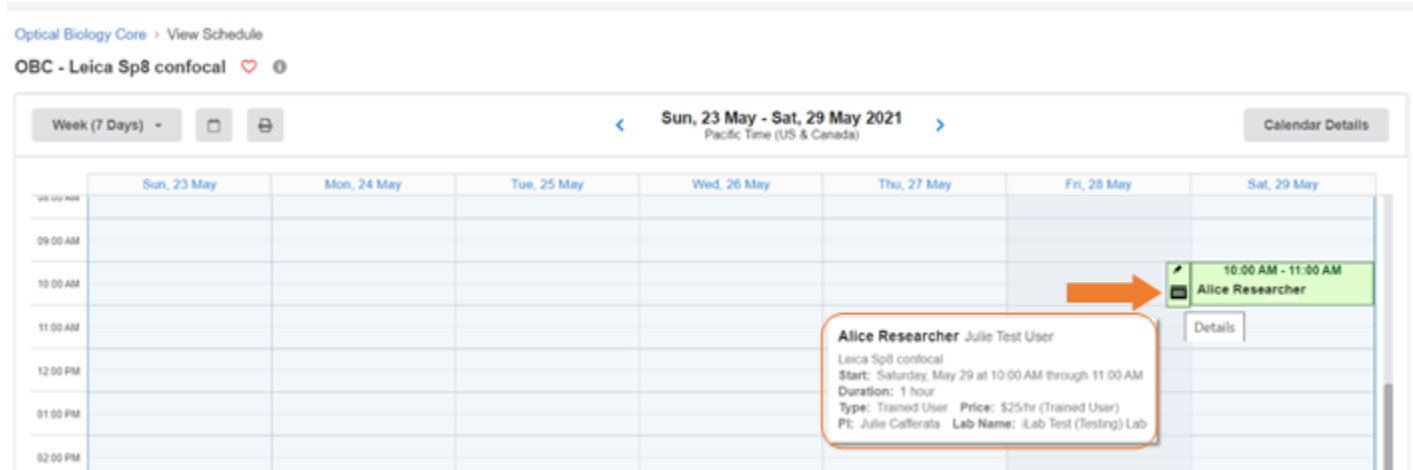
- Hover over the reservation to view details (date, time, duration, price, etc.)
- Click on the reservation to access the edit menu that appears to the left, then click on the edit menu to make changes or cancel

- Click on the pencil icon to change the reservation date and/or time (click Save Reservation to apply the changes)
- Click the Cancel Reservation button to cancel the reservation and release the time slot for other users. Note: if the core has enabled cancellation fees, you will need to accept the charge before the cancellation can be completed.


Sign-In to Use Equipment

OBC utilizes iLab Kiosk to track users' time on instruments. A user will be required to login through Kiosk in order to gain access to the instrument. A central computer or computer connected to the equipment will allow the user to login.

Access the Kiosk Dashboard

From the Schedule Equipment tab, users can access the Kiosk Dashboard by clicking on the Kiosk Link (https://uci.ilab.agilent.com/service_centers/5721/equipment_kiosk/dashboard) or the Go to Kiosk button.

When looking at the Kiosk Dashboard, a user will be able to view any active sessions, reservations up to 24 hours prior and in advance, and start a walkup session. To view details of the reservation, click on the Details button.
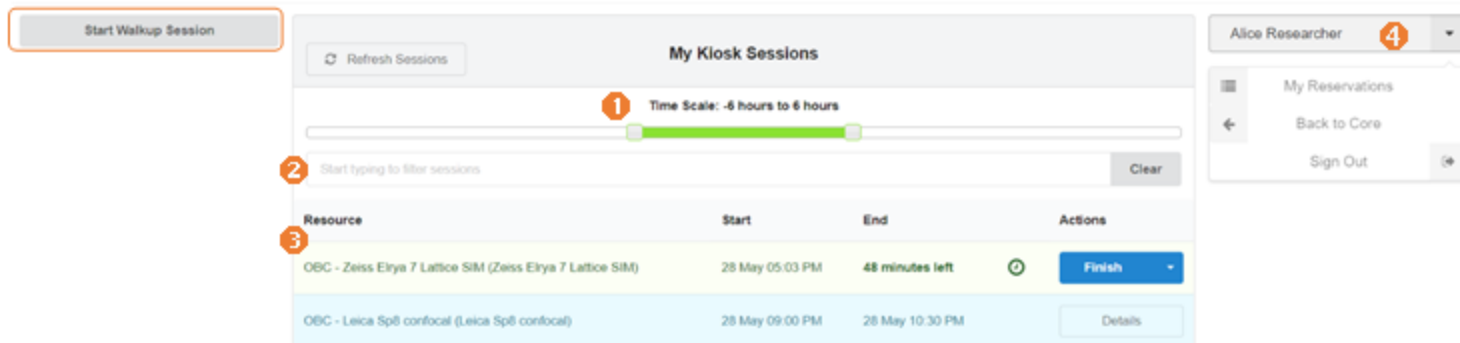
1. **Time scale**: By default, reservation(s) between 6 hours in the past through 6 hours in the future are shown (to extend/narrow the time scale, drag the endpoints of the green time scale bar)
2. **Filter**: Reservations can be filtered by entering the name of the equipment
3. **Reservations panel**: This panel lists all of your past, active, and/or future reservations (depending on the time scale)
4. **User Profile Menu**: The right-hand user profile menu will bring you back to the reservation display and the core's iLab site

Start/Finish a Scheduled Reservation

If you have previously scheduled a reservation and that reservation is within allowable advance start times, a green Start button will display in the Actions column for that reservation. You will be unable to start a reservation early if another user is using the instrument.

To begin the session, click the Start button. The kiosk will begin the session and display the elapsed time on screen.

Resource	Start	End		Actions
Configurable equipment (Instance 1)	27 Feb 01:00 PM	27 Feb 02:00 PM		Start
Test Equipment 2 (Instance 1)	28 Feb 12:30 PM	28 Feb 03:15 PM		Details
Configurable equipment (Instance 1)	27 Feb 12:37 PM	27 Feb 12:39 PM		Details

The active session interface will display:

1. **Elapsed time**: The running clock shows the time the resource has been used in this session so far
2. **Finish**: End the session by clicking on the Finish button
3. **Extend**: Time can be added to the current session with this option (additional time can be added in 15 minute increments as long as no other users are scheduled to use the equipment)
4. **Log out and use equipment**: For centrally located kiosks, users should log out of the kiosk so that other users cannot modify your session

   Note: Once you are done, you will return to the kiosk, log back in and finish your session.
5. **Payment information**: Payment information can be selected or modified from this session interface
6. **Add-On Charges**: Not enabled for OBC
7. **Use and cost of reservation**: Verify the appropriate usage type and associated costs
8. **Notes**: Users have the ability to add notes here that will reflect in the notes section in the reservation details on the main calendar (these notes default to be visible by anyone)
9. **Save information**: save all information for this session

Create/Finish a Walkup Session

If allowed by the core, the Kiosk interface can also be used to create a walkup session that starts immediately. To do so, click on the button that says 'Start Walkup Session' in the left-hand side of the screen. You will then see a list of resources available for creating a walkup session. Choose a specific resource in the Equipment panel.

1. **Equipment**: Select the equipment you want to create a session on (equipment with a green check mark is currently available for a session)
2. **Schedule**: The middle panel will display the schedule for the selected equipment
   Note: If multiple equipment are selected, one column will be displayed for each (with the equipment name shown at the top).
3. **Create session**: Start a new session
   A pop-up will ask the planned length of the session. Click Create Session to immediately start a session. This will open up the active session interface displayed and discussed above.

4. **User Profile Menu**: The right-hand user profile menu will bring you back to the reservation display and the core's iLab site

For more information visit [Using Kiosk](#)

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/5721 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 OBC related to their service requests
3. **Service request titles and descriptions**: A listing of the available OBC 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 OBC 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:

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

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

- If you are an Internal User, the Fund Number can be entered manually or 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, you will typically enter a PO number or identify another form of payment in this field

- The text field below the fund selection lets you add any notes (optional) for the core.

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).
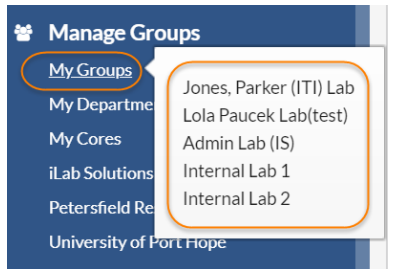
To manage your lab/group, utilize the various tabs across the top of the iLab screen (described in detail below):
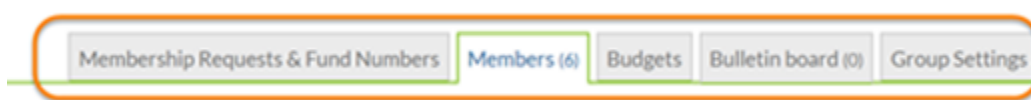
Membership Requests & Fund Numbers Tab

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

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.

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.

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

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

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:

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.

- o **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.

- o **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**:
   - o **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

   - o **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.

   - o **Edit member** (pencil icon): Allows you to edit the membership settings of any member (see item 2 below)

   - o **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:

- o **Email**: iLab communications for this user are sent to this e-mail address
- o **Phone number**: Contact phone number for the user
- o **Auto-approval Amount**: Overrides the lab default auto-approval threshold and sets different limits per member, at your discretion
- o **Permission:** This drop-down specifies the role of the lab member (e.g., Member, Manager or Principal Investigator
- o **Can order?**: Not enabled for UCI
- o **Core Financial Contact?**: Email notifications are sent to this member
- o **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.
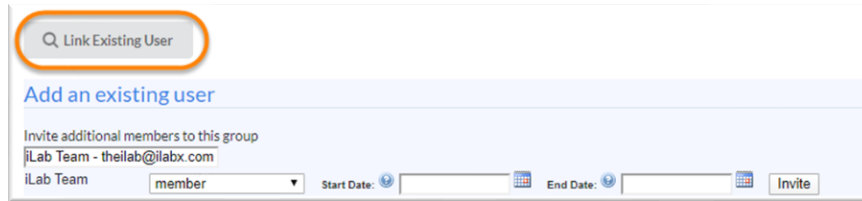
- o **End Date**: The end date for the user as a member of the lab

  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.

- o **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