



Research Platform Booking System

Quick Reference Guide

iLab

For Principal Investigators

19 May 2021

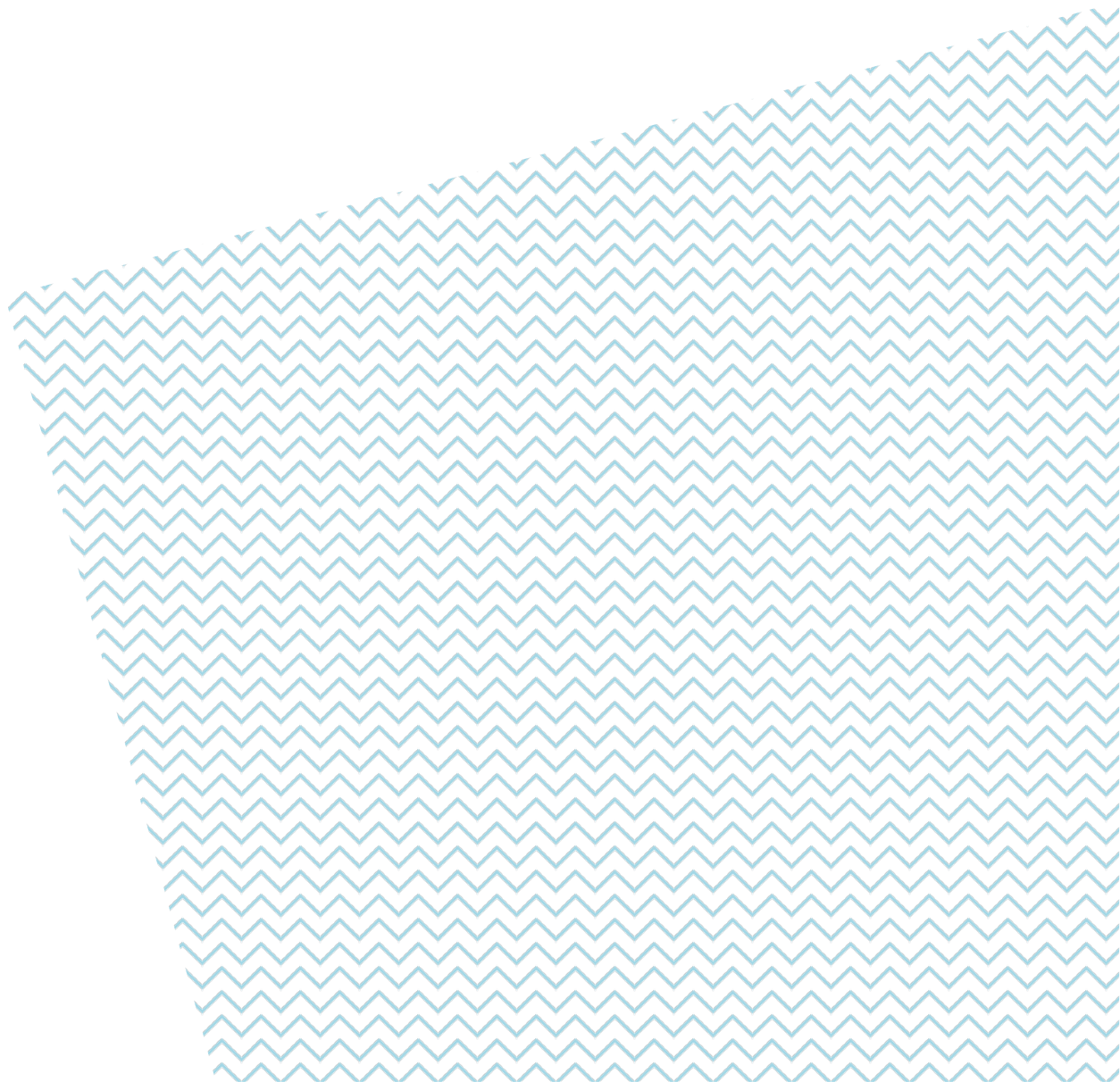
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Register for an account and lab group in iLab

External PI from an Institution Integrated with iLab

External PI Account and Lab Group Registration



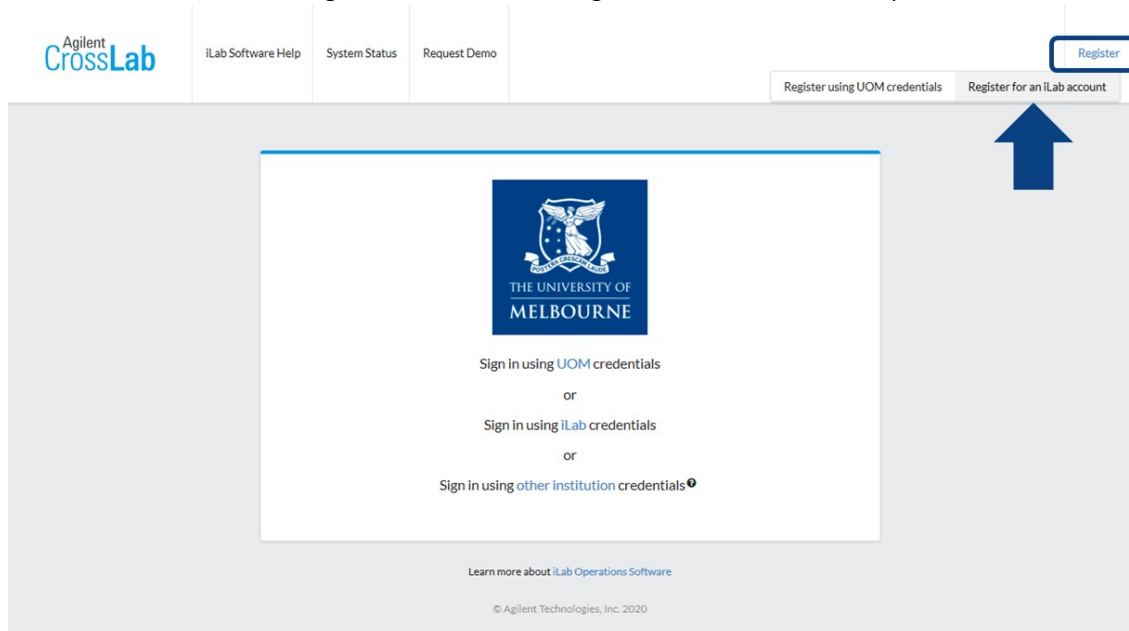
External PI from an Institution Integrated with iLab

If you are a PI from an institution that is external to the University of Melbourne but that already has iLab implemented, such as Monash University, to get started you must register for an iLab account through your institution's sign in page.

Navigate either to your institution's iLab page or the Research Platform's Core page:

<https://unimelb.ilab.agilent.com/>

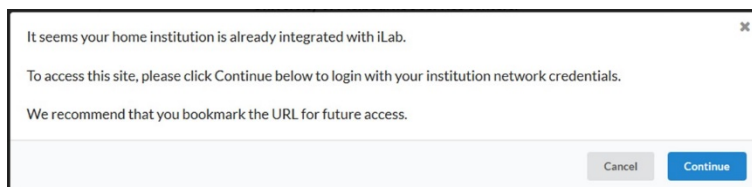
1. Hover over the word 'Register' and select the 'Register for an iLab account' option



2. Enter your institution email address into the registration form that appears and click '**Continue**'
A pop-up will appear informing you that your institution is already integrated with iLab.

3. Click '**Continue**'

Your browser will be redirected to your institutions iLab sign-in page



4. Follow your institution's registration process
5. For support please contact your local iLab integration or IT support team

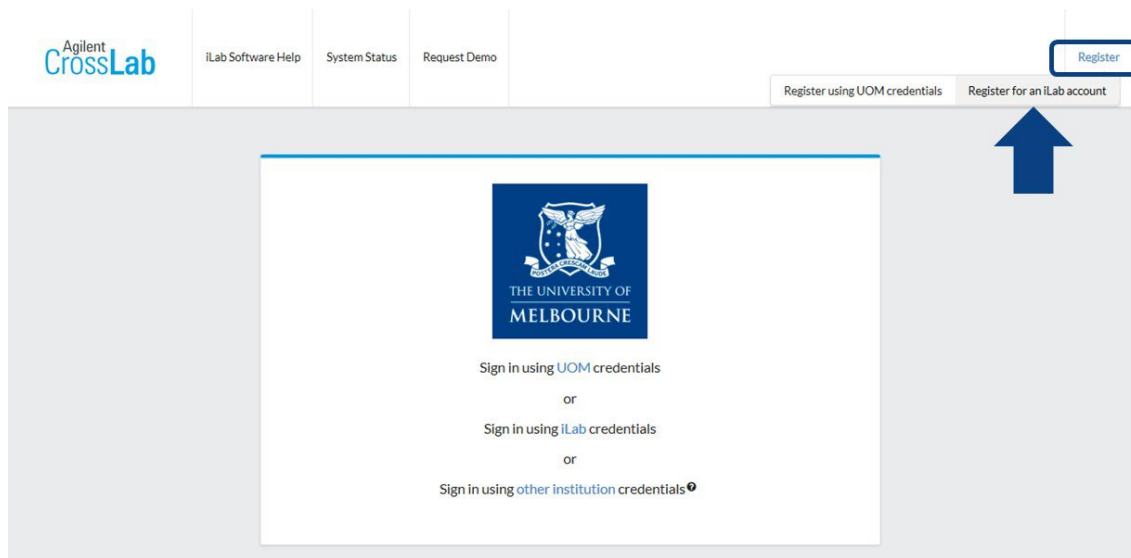
External PI Account and Lab Group Registration

If you are a PI that is external to the University of Melbourne (and not from an institution that already has iLab implemented, such as Monash University), to get started you must register for an external iLab account, and request for a new lab group to be created in your name

Navigate to either the University iLab page or the Research Platform's Core page:

<https://unimelb.ilab.agilent.com/>

1. Hover over the word 'Register' and select the **'Register for an iLab account'** option
You will be presented with a multi-step registration form to complete.



2. Enter your institution email address and click **'Continue'**.

3. Complete the mandatory fields indicated by a red asterisk and click '**Continue**'

If your affiliation does not exist for selection, enter the full correct name of your institution/workplace and select the 'create new' option.

Example: ✓ University of Melbourne

✗ UoM

✗ Melbourne University

The screenshot shows a web form titled "You are requesting access to the University of Melbourne's service centers." The form is part of a multi-step process, with "Personal Information" being the current step. The form contains the following fields:

- * First Name (text input)
- * Last Name (text input)
- Phone Number (text input)
- * I am affiliated with the following institution (dropdown menu with the text "Please type the name of your institution")
- * What is your primary role at the above? (dropdown menu with the text "Please select a role")

At the bottom right, there are three buttons: "Cancel", "Back", and "Continue".

4. Assuming that your lab group is not already registered in the system, on the Group Associations section select the '**Create New Group**' option.

5. Complete the mandatory fields indicated by a red asterisk and click '**Continue**'.

Do not change the auto-generated group name.

The screenshot shows a web form titled "You are requesting access to the University of Melbourne's service centers." The form is part of a multi-step process, with "Group Associations" being the current step. The form contains the following fields:

- * What lab or research group are you associated with? (dropdown menu with the text "Create New Group...")
- Hint: You can also search using your PI or Manager Name
- * PI's First Name (text input)
- * PI's Last Name (text input)
- * PI's Email Address (text input)
- PI's Phone Number (text input)
- * Is there another person in your lab who helps manage lab memberships, fund assignments and spending approval? (dropdown menu with the text "No")
- * Your Group's Name (text input)

At the bottom right, there are three buttons: "Cancel", "Back", and "Continue".

6. Enter the billing address for your institution/lab group. Add extra fields to the form, such as Institution and Department, by clicking the prompts on the right side of the form.

The screenshot shows a web form titled "Billing Information" as part of a multi-step process. The steps are: Start, Personal Information, Group Associations, and Billing Information (the current step). The form content includes a heading "You are requesting access to the University of Melbourne's service centers." followed by a note: "Billing information is required for core facilities to be able to charge when necessary." There is a checked checkbox "Associate new billing address to my account". Below this are several input fields: "Billing Contact Name" (with a prompt "+ Institution / Department"), "* Billing Address" (with a prompt "+ Address line"), "* City", "State / Province" (with a prompt "+ Country"), and "* Zip / Postal Code". At the bottom, there is an unchecked checkbox "Add shipping address if different from billing" and three buttons: "Cancel", "Back", and "Complete".

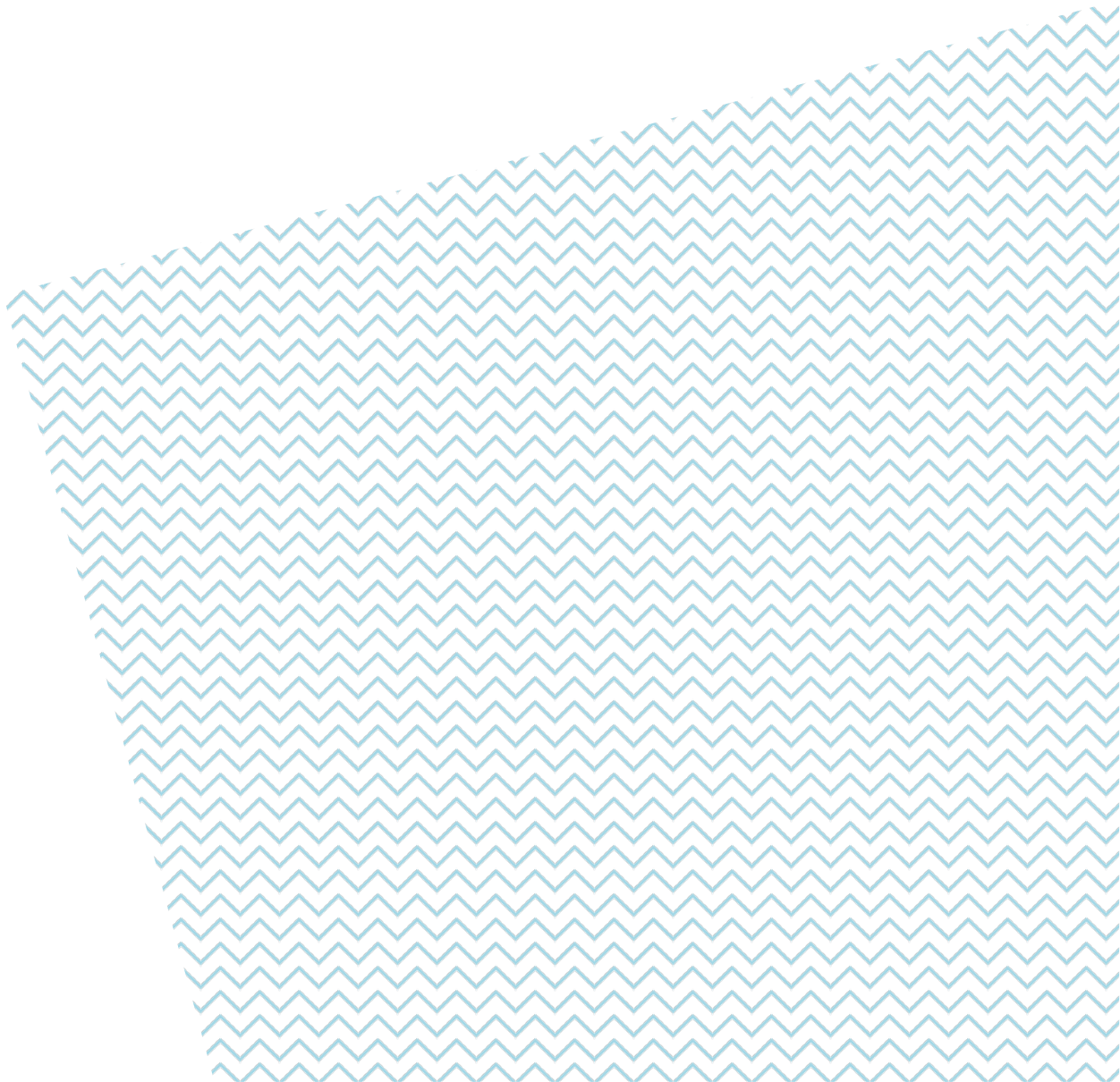
7. Click '**Complete**'

Please allow 2 business days for your account to be created. You will receive a Welcome Email from iLab with your login credentials.

Sign-in to iLab

External Sign In

Requesting Access to Multiple Lab Groups

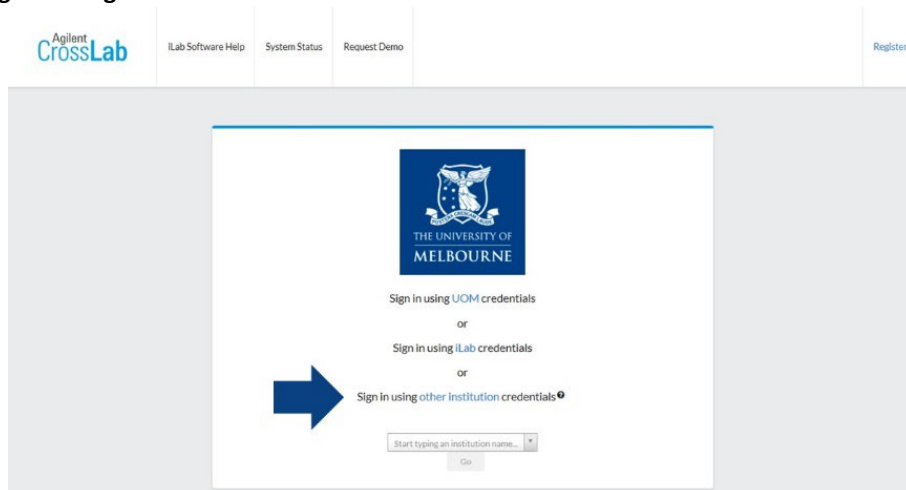


External Sign In

External researchers from an institution **with** an iLab integration will sign in via their institution login page.

Navigate to the Research Platform's Core page,

1. Click '**Sign in using other institution credentials**'

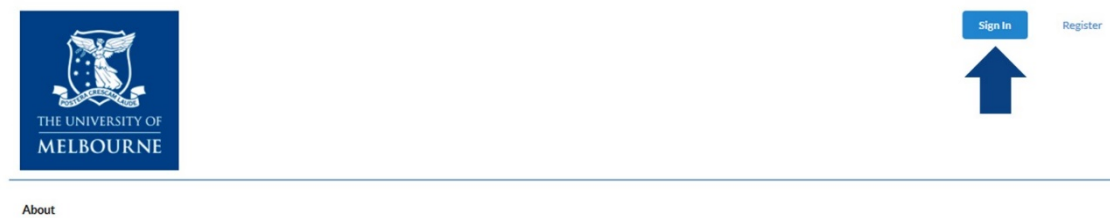


2. In the new field that appears start typing your institution name and select it when it is found.
3. Click '**Go**' and you will be redirected to your institution's iLab sign-on page
4. When you sign in through your institution you will be redirected back to the UoM Research Platform's Core

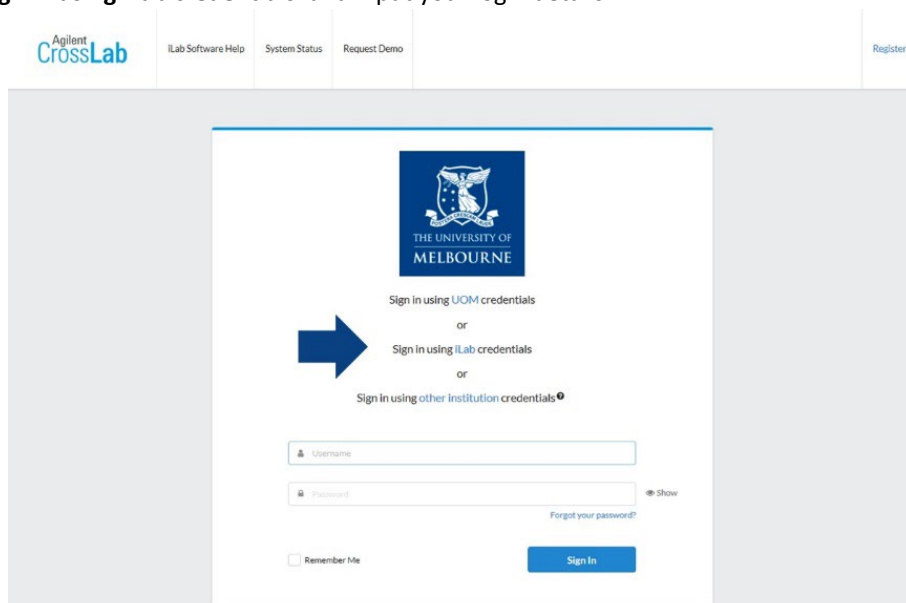
External researchers from an institution **without** iLab integration should sign in with their iLab credentials.

Navigate to the Research Platform's Core page,

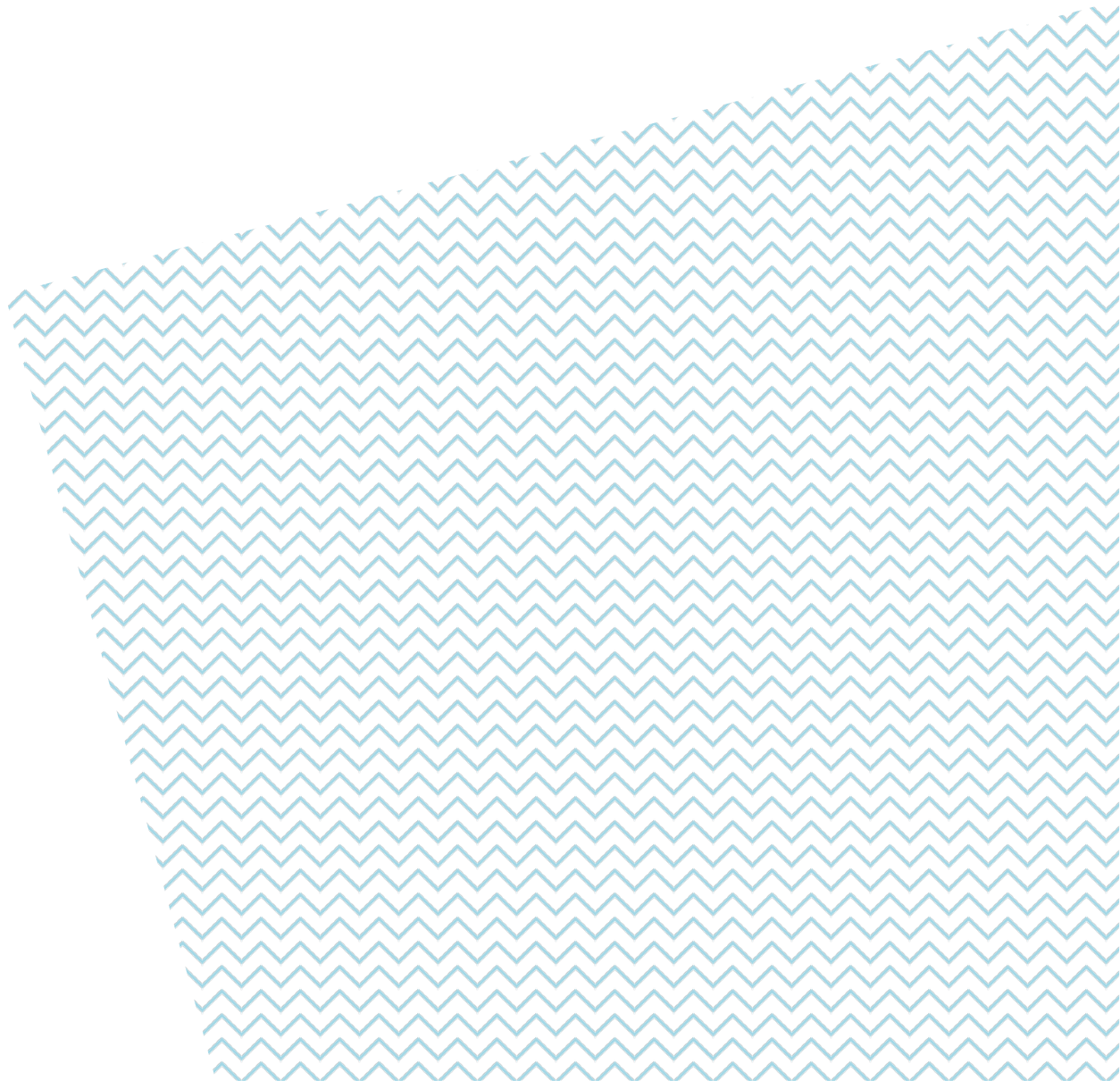
1. On the upper-right-hand corner of the screen click '**Sign In**'



2. Click '**Sign in using iLab credentials**' and input your login details

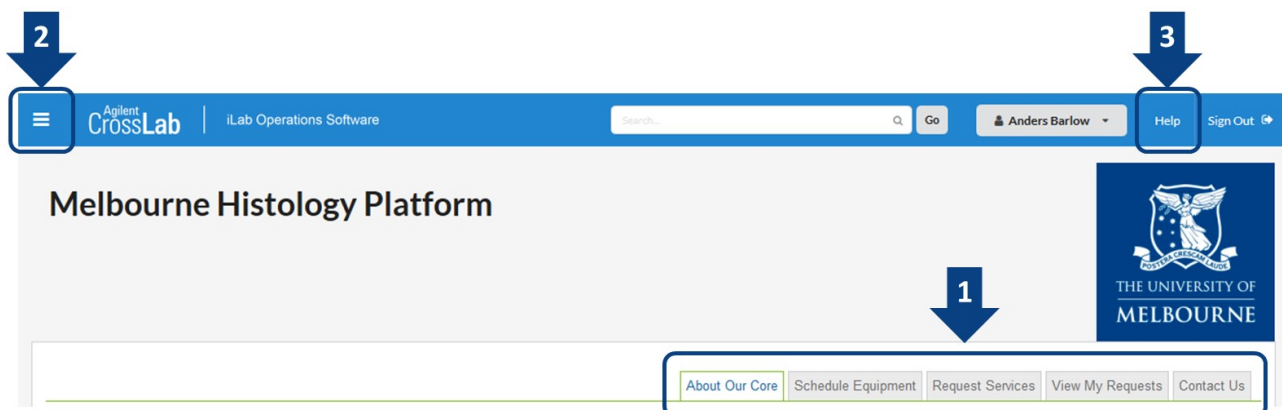


Navigating UoM Research Platform iLab Cores



Navigating UoM Research Platform iLab Cores

Agilent iLab has a consistent general appearance across all UoM Research Platforms with most end-user operations accessed via the row of tabs near the top of the page.



1 – Navigation tabs

- **About Our Core** – An overview of the platform’s research capability, services and resources, as well as contact information for the platform leadership and staff
- **Schedule Equipment** – Access the research platform’s resources including requesting training on specific resources, viewing resource schedules and booking time on permitted resources
- **Request Services** – Access the research platform’s services including general service/training requests, and specific services offered by the platform
- **View My Requests** – View requests that you have already submitted to the platform
- **Contact Us** – Submit a comment or question to the platform staff

2 – ‘Hamburger icon’ left-hand pop-out menu

- **Home** – Access service requests, messages, your cores and institutions, and all features available in the left and top navigation panels
- **Core Facilities** – List and search all core facilities at your own institution, as well as at partner institutions and other outside institutions
- **My Groups** – Manage your iLab group

3 – Help

- Access to iLab's support dashboard which provides help documentation, webinars, and access to the support portal to submit support tickets with Agilent (the system vendor)

Manage Your Research Group in iLab

Overview

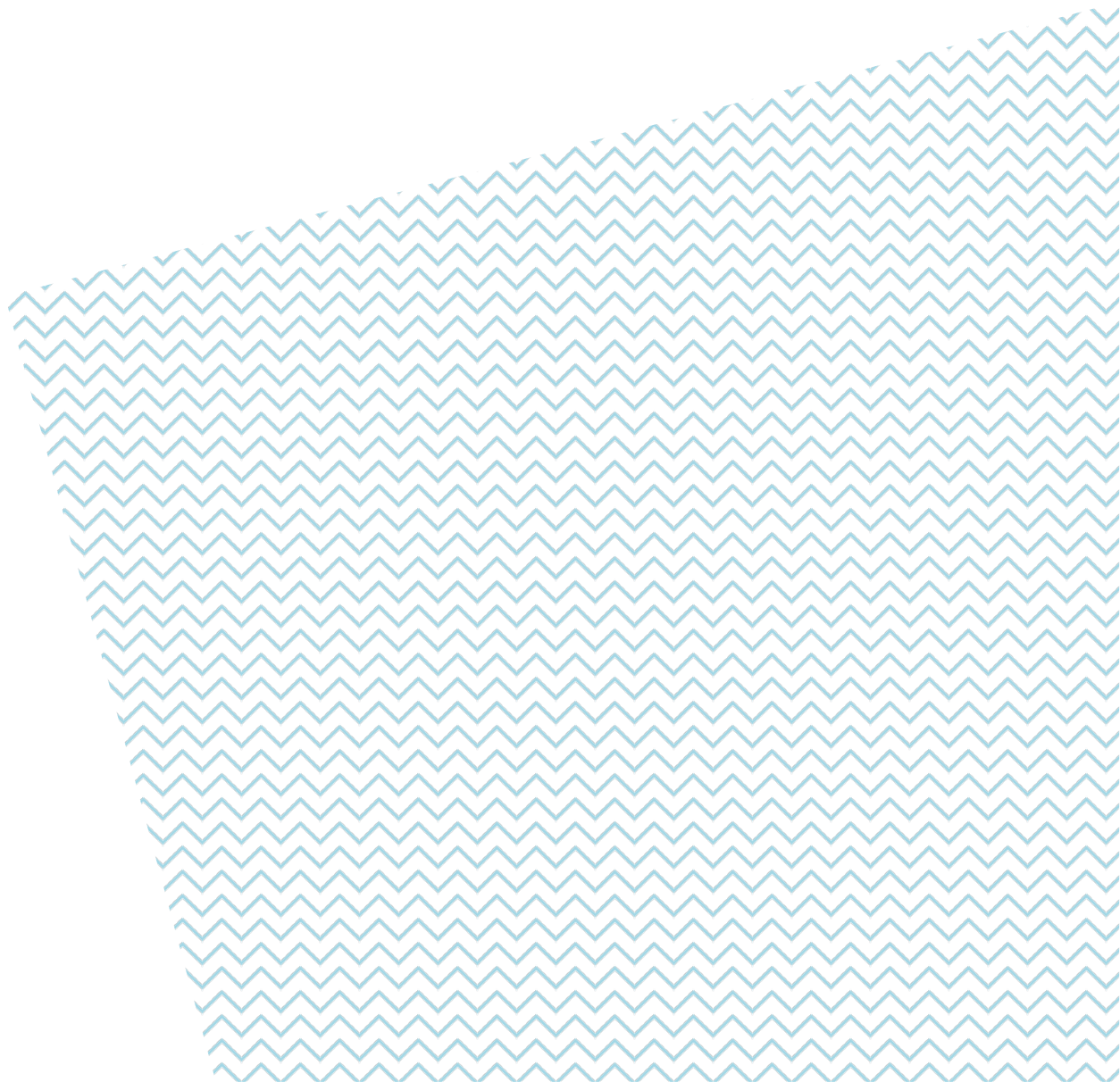
Adding New Lab Members

Assigning Lab Managers and Core Financial Contacts

Assigning Themis Account Strings to Lab Members

Adding New Themis Account Strings for your UoM Lab Group

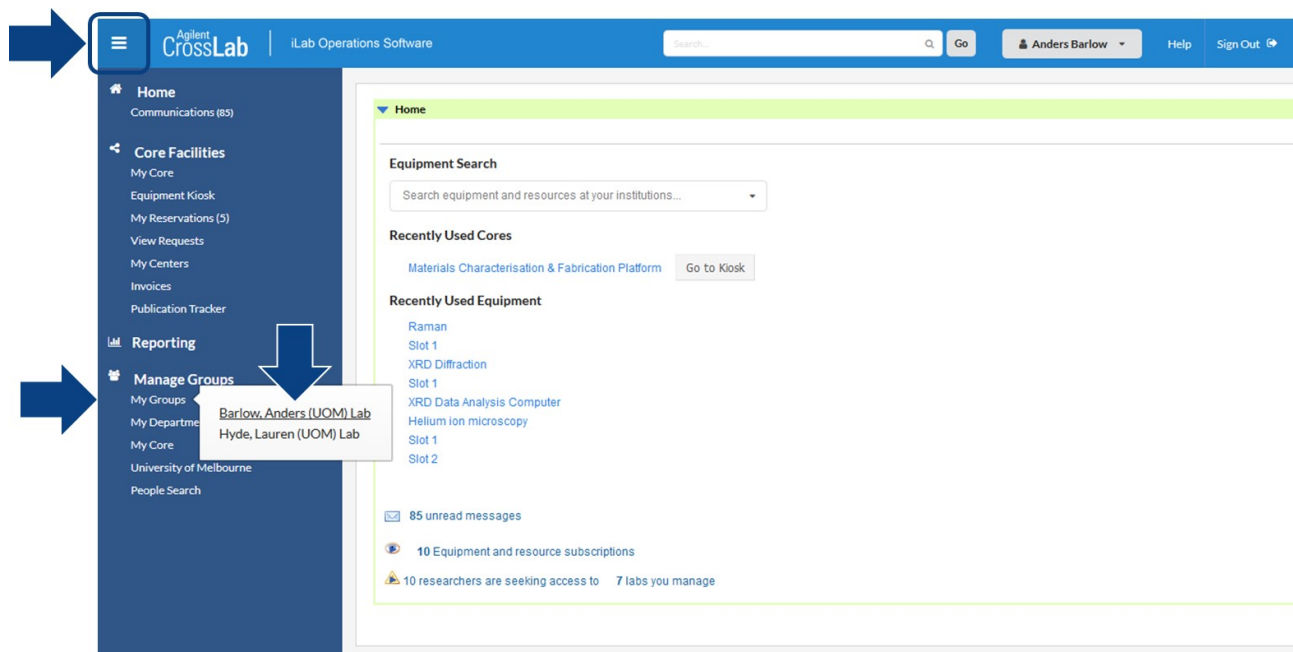
Hiding Unnecessary Account Strings in your Lab Group



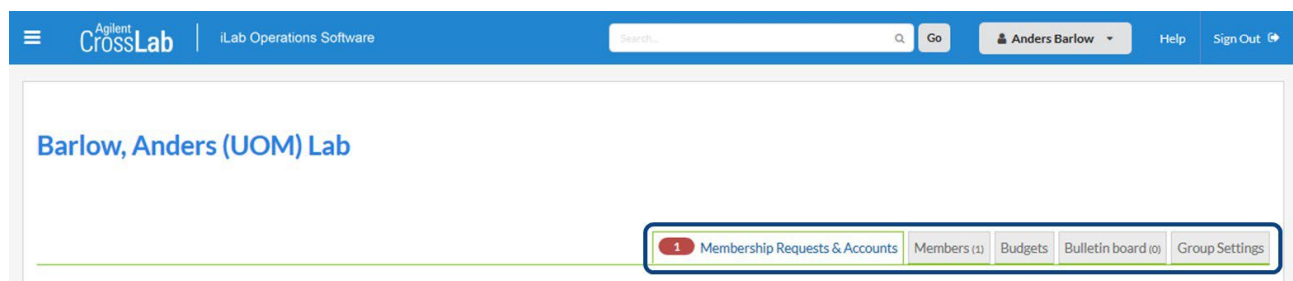
Overview

To access your Lab Group interface, first sign-in to iLab, then,

1. Locate the left-side pop-out menu by clicking on the top-left 'hamburger icon'
2. Hover over '**My Groups**' and click on your group name
 - a. Alternatively, you can click on '**My Groups**', then click on your group name in the new window



3. You will now see your lab group interface which will allow you to manage your group in iLab



- **Membership Requests & Accounts** – Here you will approve requests to add new members to your group and assign Themis account strings to your lab members. Note that a notification on this tab such as a number in a red shape indicates requests that require attention.
- **Members** – Manage your existing group members and assign roles such as 'lab manager' and 'financial contact', and link existing registered iLab users into your lab
- **Budgets** – Setup per-member or per-Core spending budgets, and set up alerts for spending thresholds
- **Bulletin Boards** – Communicate within your lab group
- **Group Settings** – Various settings including setting a lab group primary contact

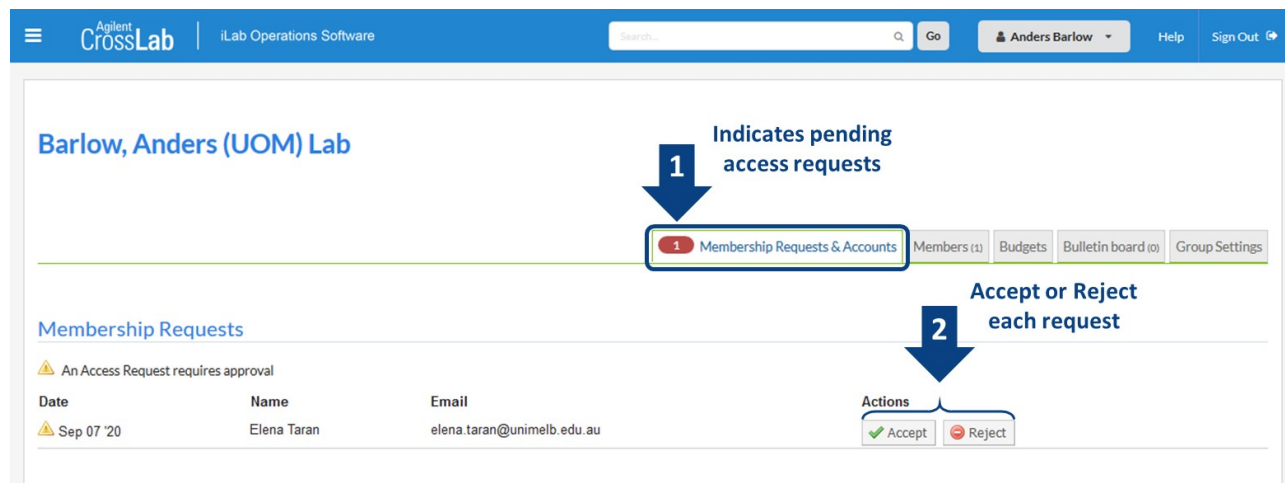
Adding New Lab Members

There are two ways for new members to be added to your lab group: via a request from the user, or by linking existing users into your lab directly.

Approving lab group access requests from users:

When you sign-in to iLab and navigate to your lab group, any pending access requests will be indicated in the 'Membership Requests & Accounts' tab and highlighted by a notification icon

1. Click on the '**Membership Requests & Accounts**' tab
2. Pending requests will appear under the Membership Requests section, to accept a member into your lab click the '**Accept**' button



Link existing users to your lab:

You can manually link an existing registered iLab user to your lab group

1. Click on the '**Members**' tab
2. Under the Lab members and settings section click on the '**Link Existing User**' button
3. Type the user's name into the search box that appears, the system will automatically search for the user, click on their name in the list that appears
 - a. Choose an appropriate role for the user: member, manager, or principal investigator
 - b. If you wish you may add start and end dates for the user
 - i. Start Date: The start date for the user as a member of the lab. If set in the future the user will not be associated with the lab until the start date. If empty, the user will be active immediately.
 - ii. End Date: The end date for the user as a member of the lab. After this date the user will be removed from the lab and will not be allowed to pay for services lab accounts. If empty, the membership will have an indefinite duration.
 - c. You can leave 'Can order?' unchecked
4. Click '**Invite**'

The user will now appear in your members list

Members (1) | Budgets | Bulletin board (0) | 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: \$ 5000.0
 Cost overage buffer: \$ 100

[save approval settings](#)

Lab members and settings

Active Members | Expired Members

| Name | Auto Approval Amount | ERP ID | Email | Phone | Start Date | End Date |
|-------------------------------|--------------------------|--------|------------------------------|----------|------------|----------|
| Anders Barlow | Lab default (\$5,000.00) | | anders.barlow@unimelb.edu.au | 90359639 | | |
| Elena Taran | Lab default (\$5,000.00) | | elena.taran@unimelb.edu.au | 83440176 | | |

[+ Add New User](#) [Q Link Existing User](#)

Add an existing user

Invite additional members to this group

Lauren Hyde - lauren.hyde@unimelb.edu.au

Lauren Hyde Can order?: ☐ member Start Date: End Date: [Invite](#)

Assigning Lab Managers and Core Financial Contacts

You may wish to delegate responsibility to a lab member by assigning them as a lab manager and/or financial contact

1. Click on the **'Members'** tab and locate the lab members section
2. Find the lab member you wish to delegate responsibility to and click the **'blue pencil icon'** to the right

Members (3) | 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: \$ 5000.0
 Cost overage buffer: \$ 100

[save approval settings](#)

Lab members and settings

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| Elena Taran | Lab default (\$5,000.00) | | elena.taran@unimelb.edu.au | 83440176 | | |
| Lauren Hyde | Lab default (\$5,000.00) | | lauren.hyde@unimelb.edu.au | 1234 | | |

3. On the new window that appears set the Permission to '**manager**', this grants the user similar rights to the PI role, allowing them to approve new members and manage existing members
4. If you wish to also delegate communication to the lab manager, check the '**Core Financial Contact**' box, all iLab notifications for the Lab Group will be sent to this user
5. Click '**Save**'

Edit membership

Person Information

Email
Institutional e-mail is preferred
elena.taran@unimelb.edu.au

Phone number
83440176

Group Information

Auto Approval Amount
\$

Association Information

Permission
manager

☐ Can order?

☒ Core Financial Contact?

Start Date End Date

Cancel Save

3 Manager has similar rights to the PI

4 Core Financial Contact will receive all email notifications about the lab

5 Click Save

6. You will now see that the green '\$' symbol has moved to the assigned lab member and that their role icon has changed from blue to yellow, indicating they are now the Core Financial Contact and a Lab Manager (you may need to refresh your page to see these changes)

- Notes:
- i. You can have multiple Lab Managers
 - ii. There is only one Core Financial Contact

Lab members and settings

| Active Members | | | | | | | Expired Members |
|-------------------------------|--------------------------|--------|------------------------------|----------|------------|----------|-----------------|
| Name | Auto Approval Amount | ERP ID | Email | Phone | Start Date | End Date | |
| Anders Barlow | Lab default (\$5,000.00) | | anders.barlow@unimelb.edu.au | 90359639 | | | |
| Elena Taran | Lab default (\$5,000.00) | | elena.taran@unimelb.edu.au | 83440176 | | | |
| Lauren Hyde | Lab default (\$5,000.00) | | lauren.hyde@unimelb.edu.au | 1234 | | | |

Core Financial Contact (points to Elena Taran's row)

Lab Manager (points to Lauren Hyde's row)

Lab Member (points to Anders Barlow's row)

If you delegate the Core Financial Contact to another lab member you as the PI will no longer receive notifications about your lab group, and the newly assigned lab manager will be able to approve new member and assign financial information.

Assigning Account Strings to Lab Members

Lab members from External Lab Groups may be able to access Research Platform resources and services without assigned payment information, however some Platforms may require Purchase Order numbers.

Lab members from iLab-Integrated External Lab Groups should follow the requirements of their own institution.

Hiding Unnecessary Account Strings in your Lab Group

You can hide account strings from your accounts grid so they cannot be assigned to lab members. By hiding accounts instead of deleting them you will maintain them as part of your lab group for future reference.

Note: if you delete an account from your lab group that was automatically imported by the system you will likely find the account will again be automatically assigned to your lab group.

To hide account strings from your accounts grid,

1. Click on the **'Membership Requests & Accounts'** tab and navigate to the bottom of the page where you will find the **'Manage Accounts'** section (you may need to expand this section)
2. Find the account string you wish to hide in the list, then click the text in the **Status column** to activate a pull-down menu, and change the status to **'hidden'**

▼ Manage Accounts

Only Accounts with no member associations can be edited/hidden/deleted. Remove all member associations above to manage a Account.
You can rename a Account only if it hasn't been used for ordering.

| Account | Status | Delete |
|----------------------------------|--|--------|
| 01-4110-00-7287-123456-GEN-12-01 | active | |
| 01-4110-00-7287-654321-GEN-12-01 | <div><div>active</div><div>active</div><div>hidden</div></div> | |

Click to set an account string to be hidden

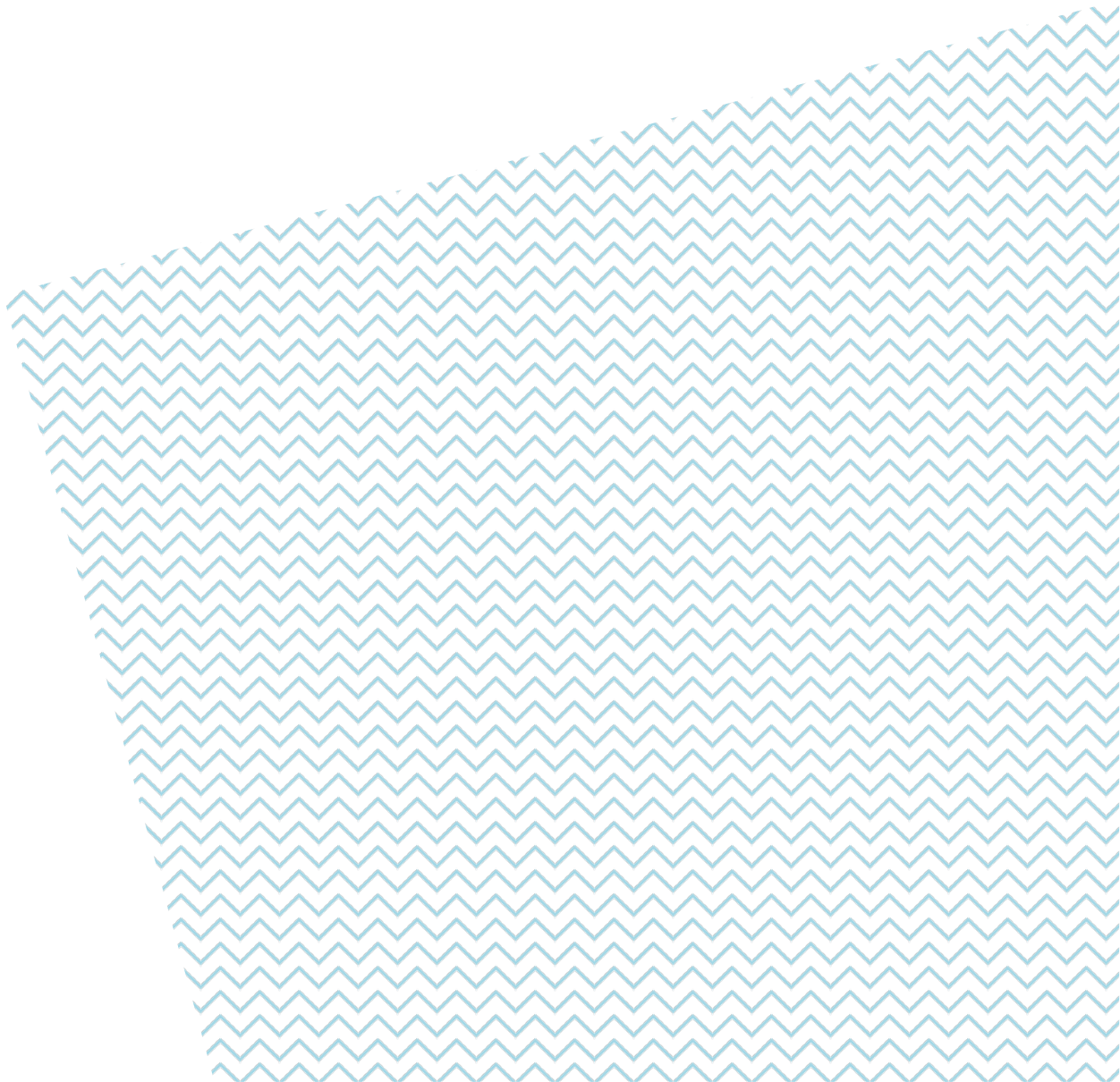
3. Reload the page and you will see that the account string has been removed from your accounts grid

Reporting

Building and Saving a New Report

Loading a Saved Report

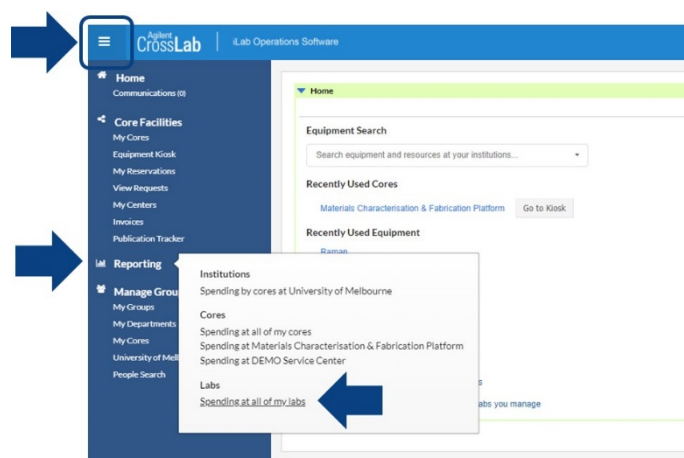
Emailing, Exporting and Printing Your Report



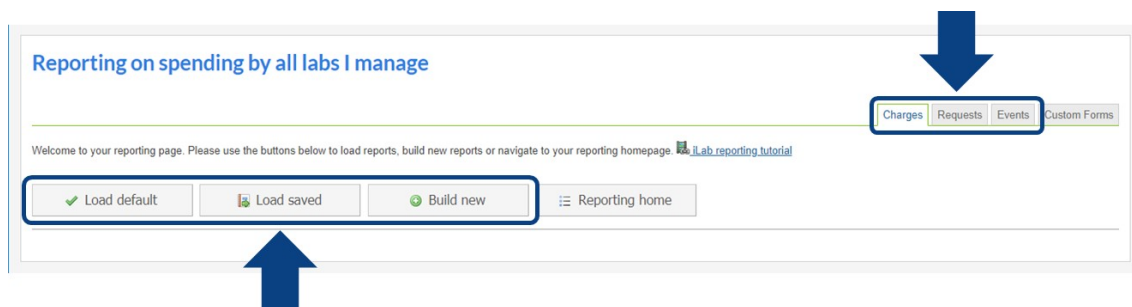
Building and Saving a New Report

To access the Reporting interface, first sign-in to iLab, then,

1. Locate the left-side pop-out menu by clicking on the top-left 'hamburger icon'
2. Hover over '**Reporting**' and under the heading Labs, click on 'Spending at all of my labs'



The reporting interface for labs that you manage will be shown



3. Select the appropriate report type from the tabs at the top-right of the interface
 - a. **Charges**: report on the financial charges generated by Platforms, e.g. quantity, price, type, etc.
 - b. **Requests**: report on Platform service requests, e.g. projected/actual cost, completion time, etc.
 - c. **Events**: report on Platform bookings, e.g. scheduled/actual time, scheduled/actual cost, etc.
4. Choose to either load the default report (a collection of pre-prepared report graphs and tables), load a saved report (that you have previously setup and saved), or to build a new report
Note: for this guide we will build a new report and save it to be loaded again
5. Click '**Build new**' to create a new report, the Report settings dialog appears

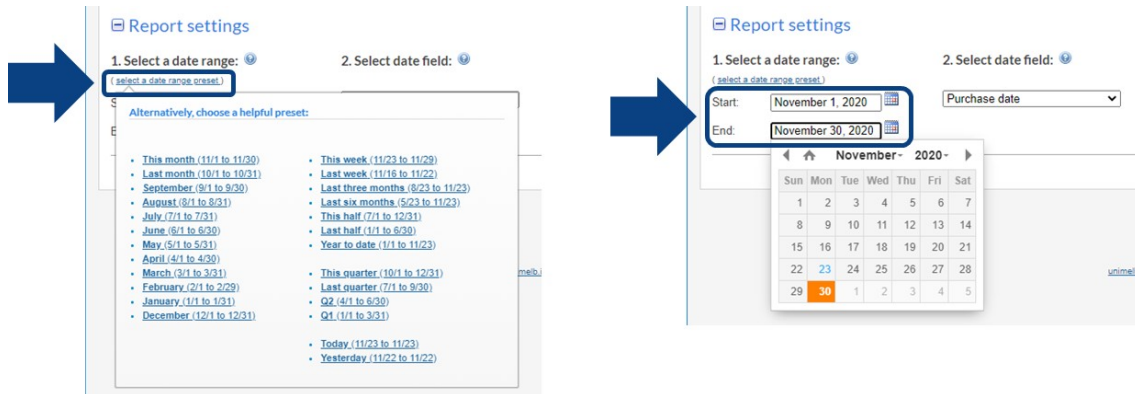


You build your report by first setting the date range to capture data from, then specifying what date to use for each item in the report, then choosing the types of outputs for the reports (graphs, charts, tables etc.), and then running the report to generate the output.

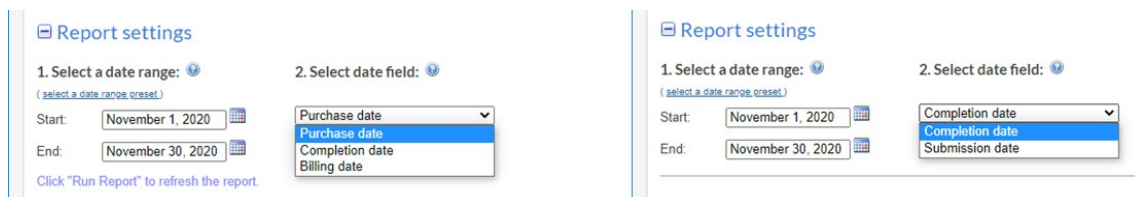
You can modify and re-run the report at any time.

6. Select a date range

You can use a pre-set date range by clicking the link and then choosing the appropriate pre-set, or you can manually type or select the start and end date for your desired report



7. Select the date to be used for items in the report



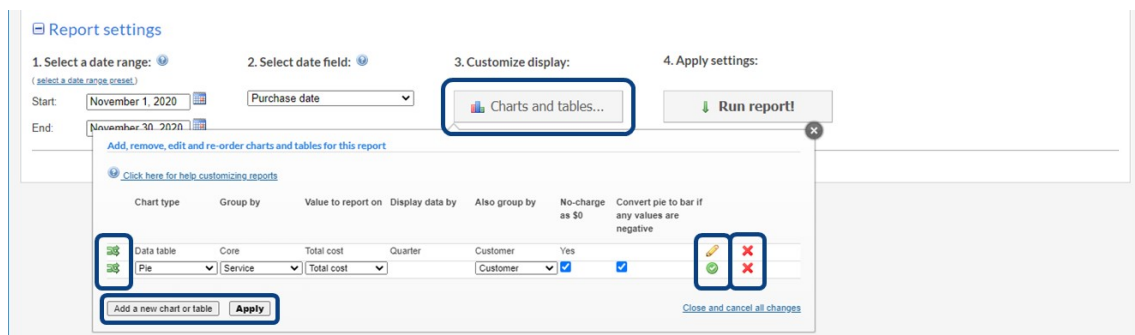
For a Charge reports:

- **Purchase date:** when the charge was created
- **Completion date:** when the work the charge is associated with was marked as completed
- **Billing date:** when the billing event the charge is included in was created

For Request reports:

- **Submission date:** when the request was submitted
- **Completion date:** when the request was marked as complete

8. Click the 'Charts and tables...' button



Initially a collection of outputs is prepopulated, to delete any you don't wish to use click the red cross.

To edit an output, click the yellow pencil icon, make your changes, then click the green tick icon.

You can configure your outputs using the following fields:

- **Chart type:** You can choose from stacked bar, line, stacked line, pie, and data table
- **Group by:** The first grouping applied to the data in the output. For example, select Core to first group charges or requests by the Core (Platform) at which they were incurred
- **Value to report on:** Choose the value to show in the report, for a Charge report this includes Total Cost, Average Cost and Quantity
- **Display data by:** Choose the time frame to consolidate data into (e.g. week, month, quarter etc.)
- **Also group by:** Apply a second grouping to the data, such as by Customer. This will create a sub-panel for the second grouping, up to a maximum of 10

To reorder the outputs, click and drag the green arrows on the left side.

To add a new output, click '**Add a new chart or table**'.

Once you have configured your report, click '**Apply**'. The report will be generated and immediately output for you to view. You can reconfigure your report at any point, so feel free to create new outputs one by one to learn how the system presents the reports to you.

9. View, edit and filter your report

Scroll down to view each panel of your report. As necessary you can update the report settings at the top of the page and click '**Run report!**' to output the result with the new settings, or you can edit each panel individually by hovering over the panel and clicking the yellow pencil icon that appears.

The screenshot shows a report interface. On the left is a filter menu with categories like Core, Customer, Lab, Department, Institution, Organization, Core Organization, Center, Work status, Billing status, Ad-hoc charges justification, No charges justification, Price type, Billing event, Study, Billing event status, Payment Number, Payment Method, Service, Request Name, and Peer Review Status. At the bottom of the filter menu are 'Apply Filters' and 'Reset Filters' buttons. On the right is a data table titled 'Materials Characterisation & Fabricat...'. The table has columns for 'Q4-2020' and 'Total'. The data rows show 'Materials Characterisation & Fabricat...' with a value of \$888.75, and a 'Total' row with a value of \$888.75. Above the table is a search bar and a 'Change this panel' button. A blue arrow points to the filter menu, and another blue arrow points to the 'Change this panel' button.

Use the filter menu on the left side of the report to further restrict the output in the report. Expand a category in the filter list, select the fields you want to display (or not display), then click '**Apply Filters**'.

10. Save your report template

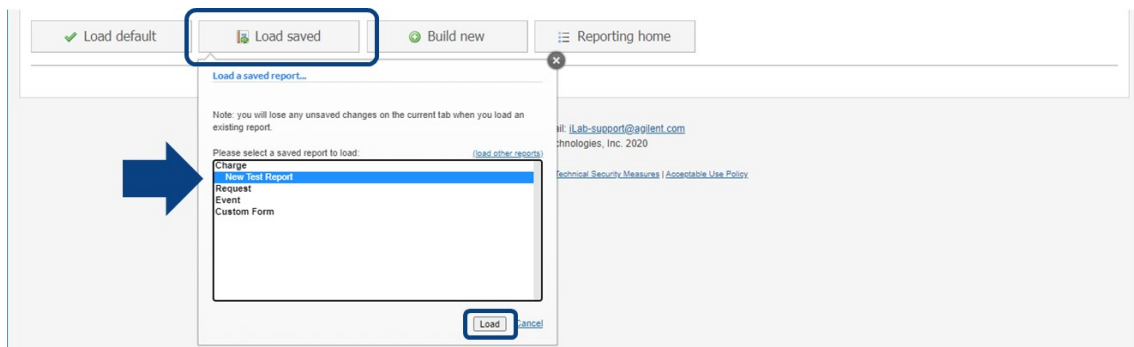
The screenshot shows a 'Save report...' dialog box. The dialog has two sections: 'Save as a new report: (enter a new name)' and 'Overwrite an existing report: (select from a previously saved report below)'. The 'Save as a new report' section has a text input field with 'New Test Report' entered. The 'Overwrite an existing report' section has a list of options: 'Charge', 'Request', 'Event', and 'Custom Form'. At the bottom of the dialog are 'Save' and 'Cancel' buttons. A blue arrow points to the 'Save as a new report' section, and another blue arrow points to the 'Save' button.

Click '**Save...**', give your report a name, then click the '**Save**' button in the dialog. This will allow you to reload this saved report template later, including all set filters.

Note: the report will automatically save under the appropriate category, i.e. Charge, Request, etc., so you can save unique reports for each type. A single report cannot be used for either/both a Charge and Request report.

Loading a Saved Report

1. Click the 'Load saved' button in the reporting interface

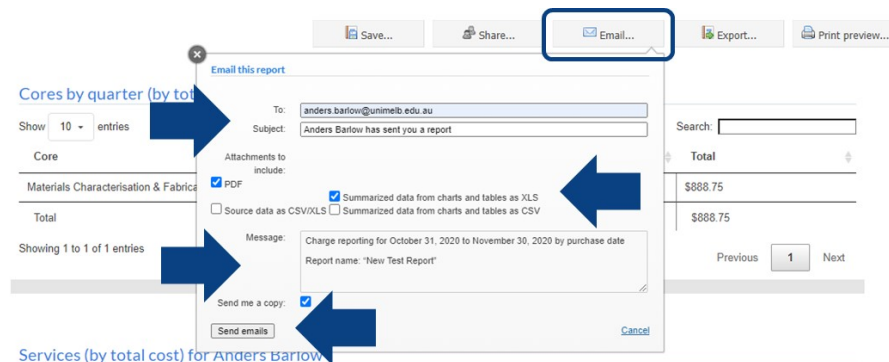


2. Select the report you wish to load. Note that you need to load the report from the correct category, i.e. Charge, Request etc., a single report cannot be used for either/both a Charge and Request report.
3. Click 'Load' to display your report. You may now view, configure and export the report as previously.

Emailing, Exporting and Printing your Report

1. Build or load the desired report
2. To email the report results...

Click 'Email...' to send a copy of the report to a colleague. In the dialog window type in the recipient's email address. Edit the subject line if you wish.



Select the type of data file(s) to send the recipient:

- A PDF copy of what is seen displayed as the report
- CSV/Excel files of either the summarised data that makes the tables or charts in the report
- Raw source data used to generate the report
- All the above

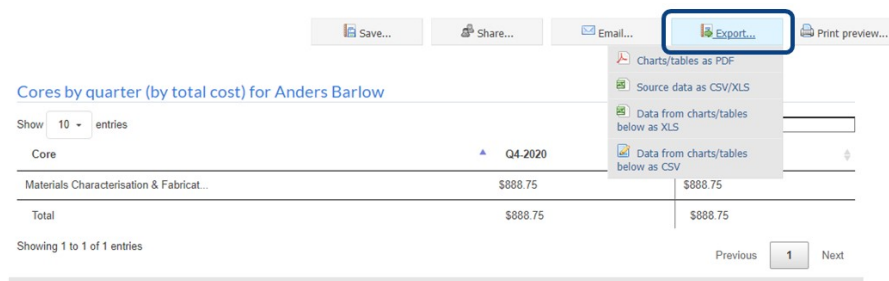
Edit the message if you wish and choose whether to send a copy to yourself (this will go to the email address attached to your iLab account).

Click 'Send emails'.

3. To export the report results...

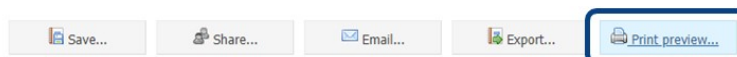
Hover over the 'Export...' button. You will be presented with four options:

- Export the charts and tables displayed in the report as a PDF file
- Export the data from charts and tables as either Excel or CSV files
- Export all the source data (not just what is shown in the report panels) in the report date range to a CSV file. This option is typically the most useful if you wish to analyse the full data sets in other applications (e.g. Excel).



4. To print the report results directly from your browser...

Click 'Print preview...' to display the report in a new browser window.



The report will be displayed in a simple format with only the relevant information and report panels shown for you to print directly from your browser.

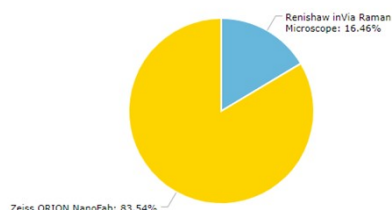
New Test Report

Charge reporting for November 1, 2020 to December 1, 2020 by purchase date

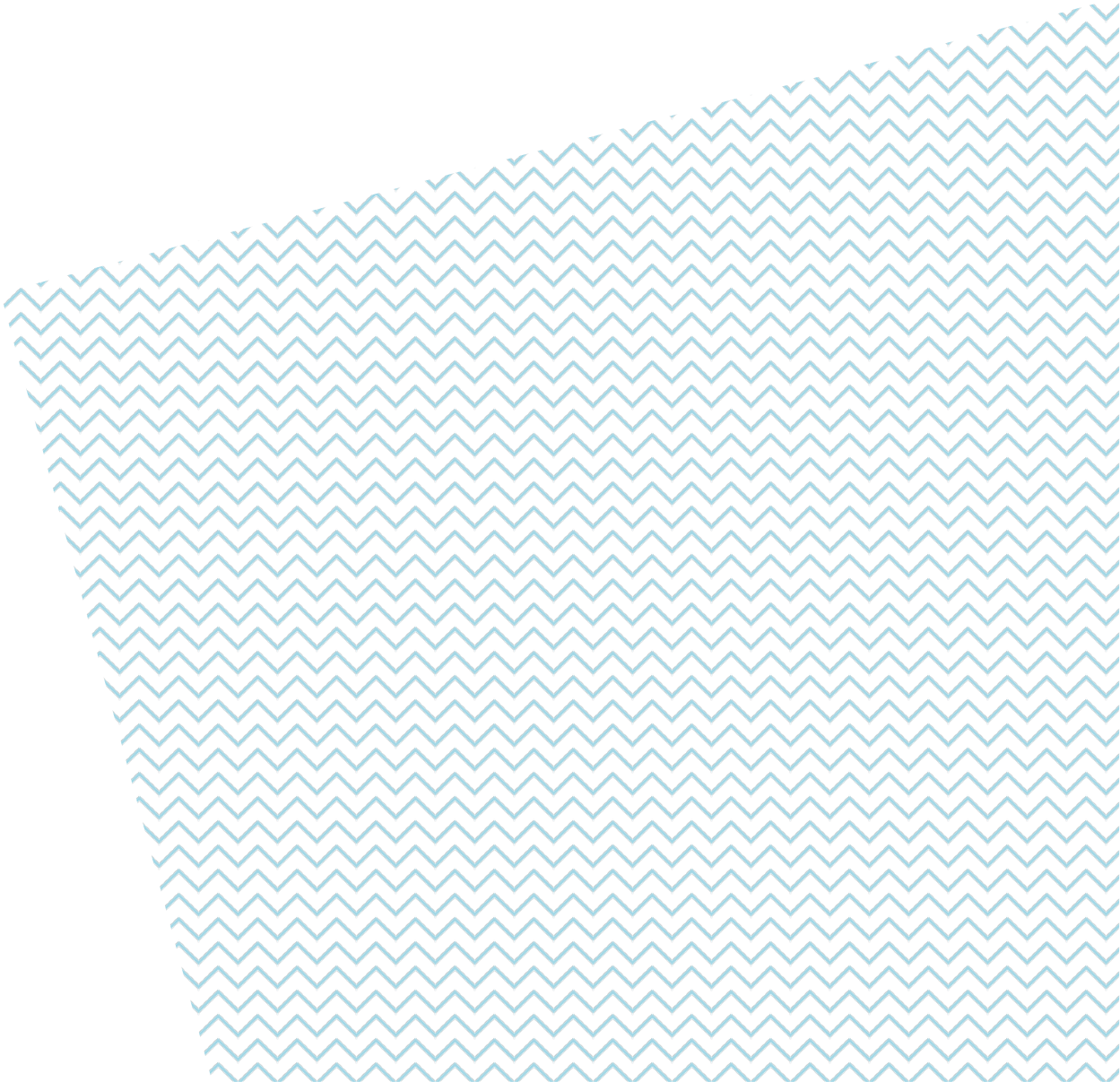
Cores by quarter (by total cost) for Anders Barlow

| Core | Q4-2020 | Total |
|---|----------|----------|
| Materials Characterisation & Fabrication Platform | \$888.75 | \$888.75 |
| Total | \$888.75 | \$888.75 |

Services (by total cost) for Anders Barlow



Support



Support

For external researcher login issues, researchers should contact your institution's IT Support if your institution has an iLab integration or contact iLab directly at iLab-support@agilent.com if your institution is not on iLab.

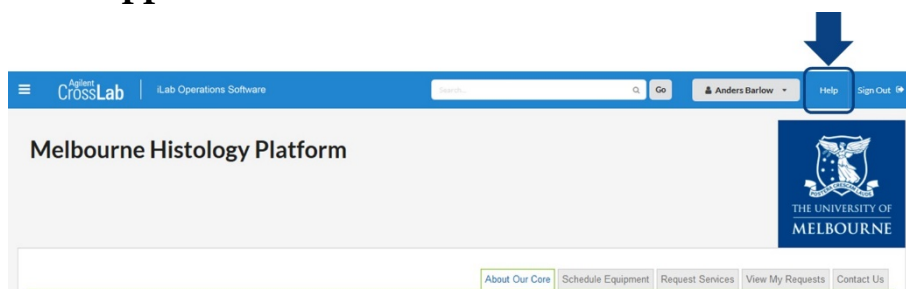
For any resource, service or platform-specific support, your first contact should be with the platform management staff. Contact information for the platform will generally be included on the 'About Our Core' tab.

For support with financial payment information PIs should contact the Platform Managers for support with Purchase Order Numbers.

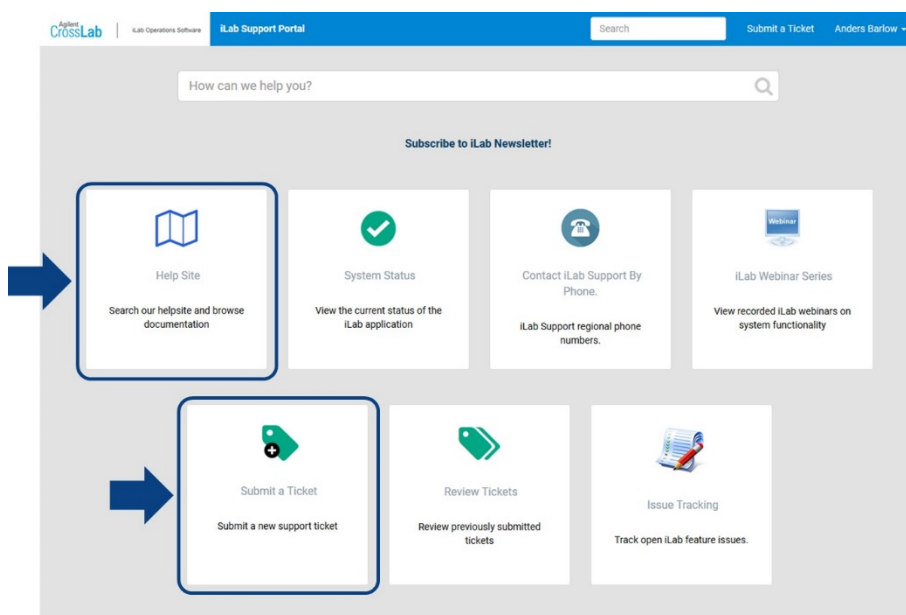
For simple or general iLab support and "How do I...?" type questions, talk to platform support staff who will be able to assist you with frequently asked questions.

For more in-depth iLab support read through the Help documentation on the iLab support portal.

Access the iLab Support Portal



From any core page you will be able to access the iLab Help Portal by clicking the 'Help' button in the top-right of the page. This will open the portal in a new window.



In the iLab support portal you can view the Help Site, which provides comprehensive documentation on the operation of iLab from an end-user perspective (see Using a Core).

Here you can submit a support ticket to Agilent for help with technical issues that could not be resolved locally. Please exhaust local support first before contacting Agilent for support as many issues will likely either be known about or have solutions already that local support can resolve.

