iLab Solutions

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iLab Solutions: Core Facilities
Core Customer Help Manual

Table of Contents
Click on the title to navigate to that section of the document.

Overview

iLab is designed to help core facilities manage the process of requesting and billing for services rendered and the use of equipment.

Instructions on how to access the system should be provided to you in a separate communication. Please contact core staff or other appropriate personnel if you did not receive these instructions.

The general work flow for placing service requests is:

1. The customer logs into iLab and places a request with the core
2. The core provides a quote for the services requested
3. The customer logs into iLab and agrees to the work and projected cost (quote)
4. If necessary, the Principal Investigator or a Financial Administrator review the request
5. The core completes the work and bills the researcher
6. If appropriate, summary results are made available for download through iLab

If you experience any problems using iLab, do not hesitate to click the **leave iLab feedback** link in the upper right hand corner once you are logged in. The *leave iLab feedback* link will give you the most comprehensive iLab support. Alternatively, send an email to support@ilabsolutions.com with your question and we will respond as soon as we can.

My Homepage

When you first log into iLab make sure you update your time zone by choosing your correct time zone and then clicking on *Update my time zone*. After you update your time zone you will either land on the core's page you logged into or you may land on your homepage (*Figure 1*). On your homepage you can view quick links to facilities you often use, view requests that require your attention and view a list of your reservations. You have menu options to manage your account, manage your support tickets and find lists of cores that you can access through iLab when you are on any page in iLab.
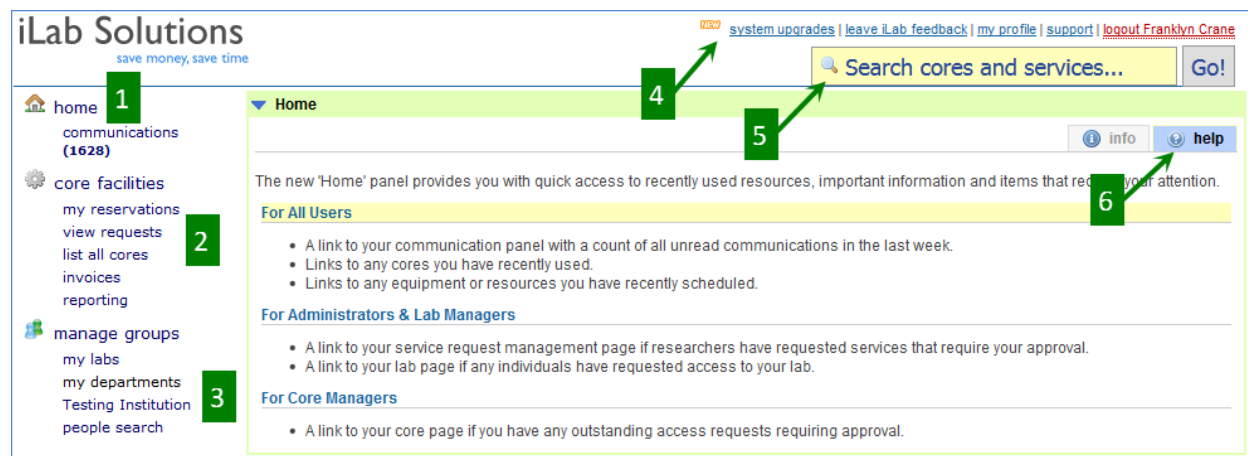

Figure 1. When you first log into iLab, you may land on your homepage. You can also navigate to the homepage by clicking on home at the upper-left corner. On the homepage you can find quick links to cores, requests and services that are relevant to you.

The options on the left-hand panel and upper-right panel can be accessed regardless of the page you are on in iLab. The *home* menu option on the left side of the page (*Figure 1.1*) will take you to your homepage and homepage panels. Under *home* is the *Communications* menu option where you can view emails sent through the iLab system. If your lab also utilizes the iLab Lab Management system, you will see menu options on the left side of the page for requisitioning.

Under *core facilities* (*Figure 1.2*) you may see *my reservations* where you can view past and future reservations you have with cores. You can see requests of services or projects that you have submitted to cores from the *view requests* link and you can see a list of cores that you can access from *list all cores*.

Under *manage groups* (*Figure 1.3*) you can view *my labs* to see details about your lab and lab members. If you are a Principal Investigator or Lab Manager please review PI + Financial Admin Training Manual for more details about managing your lab in iLab.

The upper-right hand corner provides links for you to view recent updates, contact iLab support with *leave iLab feedback*, manage your account in *my profile* and manage your created support tickets from *support* (*Figure 1.4*). If you contact us through *leave iLab feedback,* you will be sending a message to the iLab support team so you will receive the most comprehensive support. This will also enable you to track your support tickets. You can view the support tickets you have sent by clicking on *support*. You can view manuals (like this one) with basic instructions on how to make a request and reservations on *Generic Help Documents* on the *support* page.

In *my profile* you can update your name, log-in information, password, and manage how you want to receive system-generated messages in *Manage Communications Preferences*.

Under the menu options is a search bar. If you are only a user of cores, you can use this search bar to find services and resources list in iLab for your institution (*Figure 1*.5). If you also use our lab materials requisitioning system, you can search for core facility services and for products.

When you are on your homepage, you will see panels will have panels with different kinds of information. Each panel will have a help tab (*Figure 1*) with more information about what you can see in the panel.
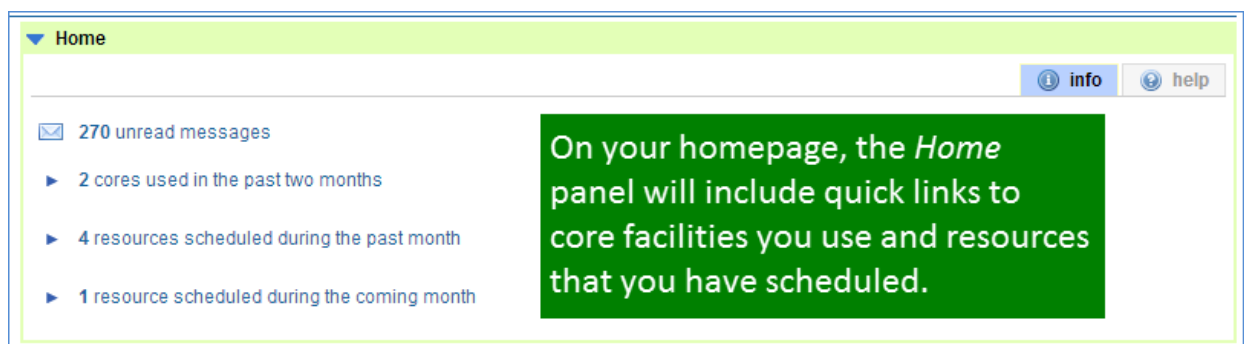
Figure 2. **You can access quick links to cores and resources you have used in iLab in the panels on your homepage.**

Under the *Home* panel you may see a *Service Request* panel. This panel will have any requests that require your attention in the *alerts* tab (*Figure 2*). Requests that require attention could be ones that require your approval, ones that are missing payment information or ones that you have not submitted to the core. Lab heads will see requests from all of their lab members and for themselves that require approval in the *Service Request* panel.
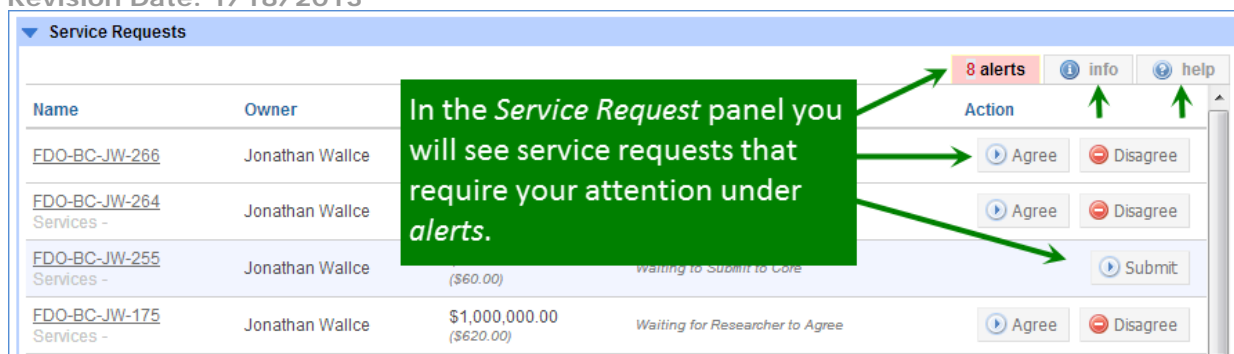
Figure 3. If you have any service requests with any cores in iLab, you will see the *Service Request* panel on your homepage. In this panel you will see requests that require your attentions under *alerts*. The *info* tab researchers see all of their own requests across the cores in the system for a 6 month period. The *help* tab gives you more information about the *Service Requests* panel.

Under the info tab you will see up to twenty of your most recent requests (*Figure 3*). For more information about the Service Request panel, click on the *help* tab.

You may also see a *Scheduled Events* panel on your homepage. This panel will show any of your reservations that are still pending core approval in the *alerts* tab, and all of your future reservations, up to fifteen, in the *info* tab. Again, click on the *help* tab to see more information about the *Scheduled Events* panel (*Figure 4*).
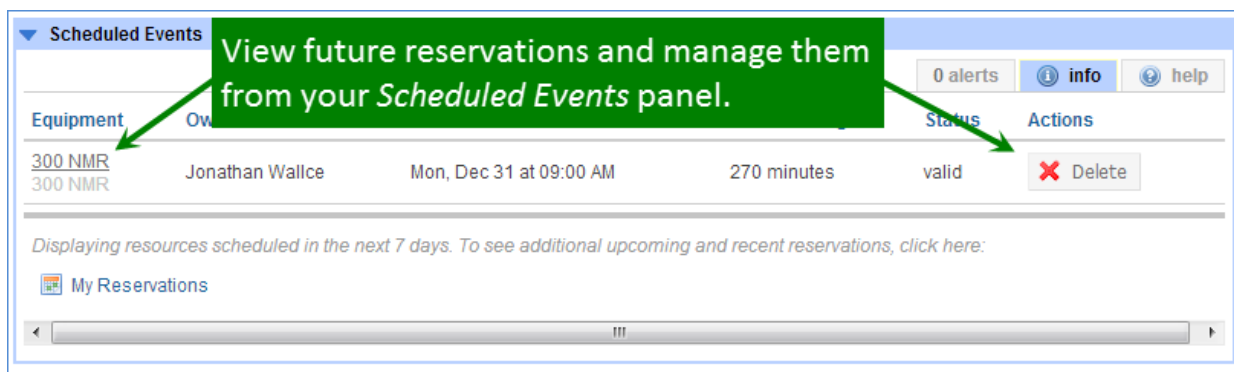
Figure 4. If you have scheduled reservations on any core resource calendars, you will see the Scheduled Events panel. On the Scheduled Events panel you can view future events, click on the resource name to view the calendar, or take specific actions like deleting or cancelling the event.

iLab Solutions: Core Facilities Core Customer Help Manual
Revision Date: 1/18/2013

How do I Request a Service?

To request a service, login to the core's web page by following the directions you received in the iLab welcome email, or by using the core's direct link, if core staff has provided you with the link. **Note: The core facility staff has the ability to edit the information seen on their site. The instructions below are general instructions. When you land on the core's page, you may not see exactly the information provided in this manual, but we hope this will guide you through the basic steps.**

To initiate a service request go through the steps outlined in Figure 5 and Figure 6.

Figure 5. **To view and request services provided by the core, click on the Request Services tab.**

1. To submit a service request to a core, once you have landed on the core's page, click on the *Request Services* Tab. (*Figure 5*)
2. Select the service of interest and click on *request service*.

Figure 6. **To initiate the request, fill out and save the form, enter any valid payment information and submit the request to the core.**

3. Fill out all information on the subsequent form. Required fields are highlighted with a red star to the left of the field title (*Figure 6*).
4. Make sure that you click *save form* once you have filled out all of the required fields
5. Choose the appropriate payment information when applicable
6. Click *Submit request to core*

The core staff is able to generate their own forms. This being said, if you have any questions about the services listed on the core's site or questions about the form, please contact the core staff directly. You can either click on *Contact Us* to leave a message for the core, or you can look at the *About Our Core* tab to see who the core contacts are and more information about the core.

Figure 7. Reference the About Our Core tab to see more information about the facility or click on Contact Us to leave facility staff a message.

How do I Approve the Quote?

Once the core has reviewed and approved your request, the core may provide you with a quote or cost estimate by email. The email will contain a summary of the request with a direct link to your request where you can review the request including milestones and any anticipated charges. When you are ready to approve the quote you can click on *Agree* on the right of the quote. At this time you may be able to update your payment information, if necessary, and even set a different amount you agree with.

Figure 8. **After logging in from the email you receive, you can view the request details, projected cost (quote) and agree to the project.**

Once you click on *Agree*, the core will be notified of your intent to continue with the work, and will notify you when work begins on your project and at other important milestones, including project completion.

How Do I Review Requests once Initiated?

You can review any of your requests by clicking on the *View My Requests* tab on the core's page, once you have logged in. On this tab you can use the light blue Find bar to search for specific requests. You also can view all of your requests and see what status they are.
Click on the blue arrow icon to the left of any request row to expand and view details for the request.

Figure 9. **On the View My Requests tan on the core's page, you can view all of your requests with the core to see request details and the status of the request.**

What Tools are Available to me to manage My Requests?

Can I update payment information any time?

On the far right side of the request row there are icons you can use to help you manage your requests. The first icon is a dollar sign icon ( ). This icon allows you to view the payment number per charge and to update your payment number. Depending on the core's settings, you may even be able to use multiple payment numbers per charge if you see the double arrow icon ( ).
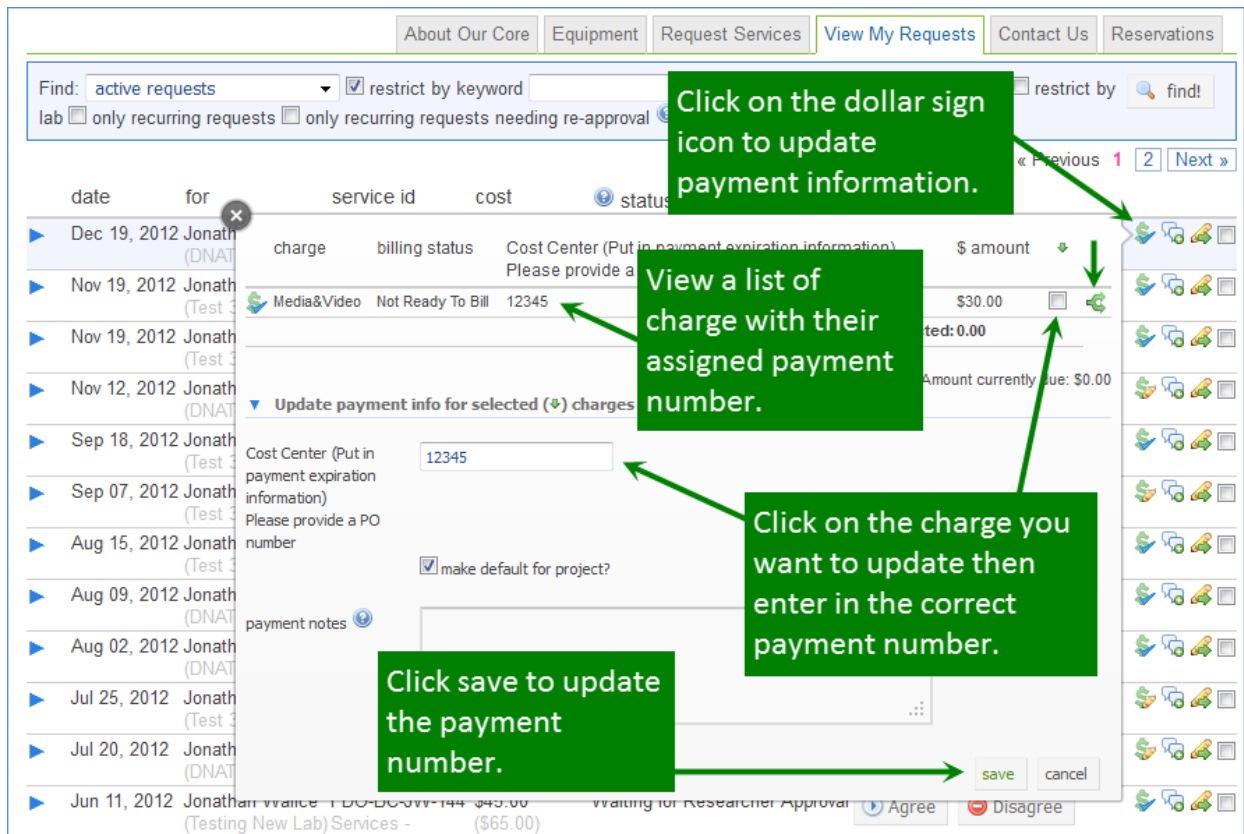

Figure 10. **You can update the payment information for the project at any time during the course of the project. Make sure to choose the charges that the new payment number applies to when updating the payment information.**

How can I Communicate about Request in iLab?

To communicate about a request, click on the "comment" icon (🗨) at the top of the request row and enter the message you would like to send. In the message pop-up, choose who you want to send the email to and enter in your message. The email sent will include a link to the request.
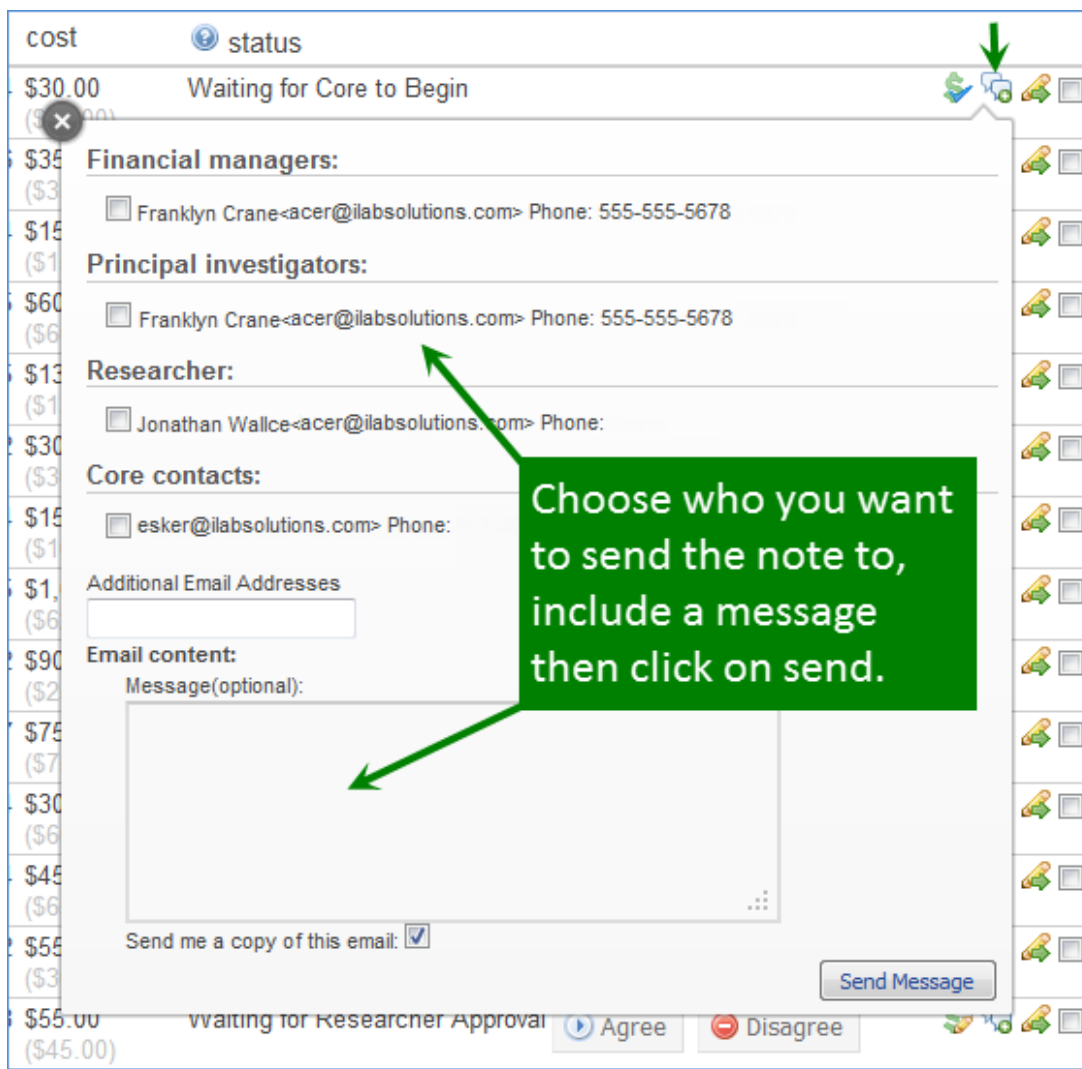

Figure 11. Click on the communication bubbles to send an email about the request. If you us iLab for your communications, they will be tracked within the request.

Can I Print the Request Details?

The icon (   ) to the farthest right on the request row allows you to print out different aspects of the request. You can choose to print out all sections of the request or just one section like the form. There is also a print icon (   ) on each form within the request that you can used to print just the form.

Can I Download Results and Documents?

The core can upload experimental results and send you an email so you can download results easily. Results will be made available to you in a form or in an attachments list.

To access experimental results, click the blue arrow to expand the request of interest and look for the attachments panel (*Figure 9*). Download any files of interest.
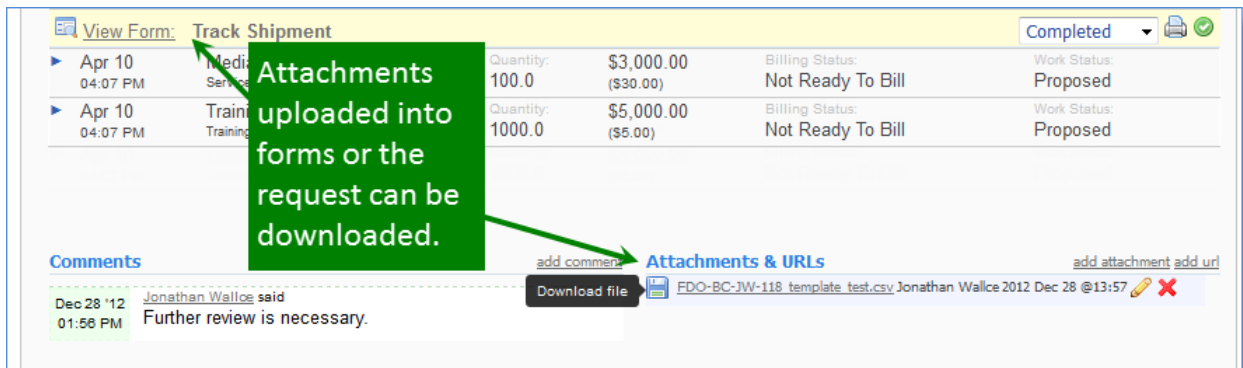

Figure 12. You can upload files needed for the project or core staff can upload experimental data for you to access. Please do not upload anything larger than 5MB at one time.

Can I Track the History of the Project?

You also have the opportunity to view the history of the communications on the request and the changes made to the request. Review the history at the bottom of the request under *Comments* and *Service Request history* (*Figure 13*).

You also can update your *Billing* and *Shipping Information* on the bottom of the request (*Figure 13*).
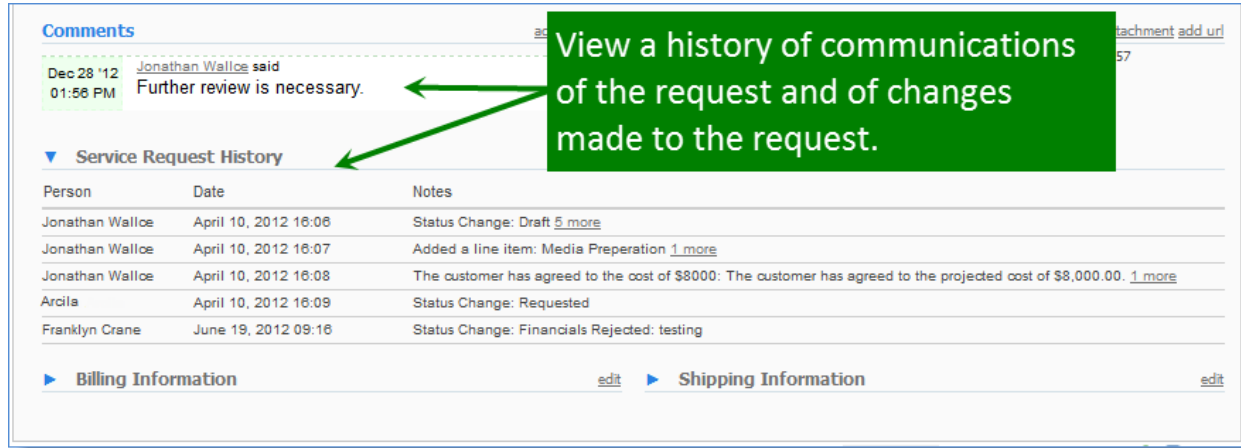

***Figure 13.* At the bottom of each request you can view the communication history on the request, changes to the request and update your billing or shipping information.**

How do I make Reservations on Core Facility Resource Calendars?

Some core facilities may also have calendars that you can schedule on to reserve time on for their resources. To see more information about scheduling resources in iLab, please click here.

Contact us at support@ilabsolutions.com for any additional questions.