



Transgenic Mouse Facility (TMF)

iLab User Guide

Revised 8/26/2021

Contents

Register for an iLab Account	1
Registration for Internal (UCI) Users	2
Registration for External (Non-UCI) Users	2
Pre-Registered Internal Users (CFCCC Members)	3
Navigate iLab	3
Request Access to Additional Lab/Group	4
Overview of Using a Core	5
Initiate a Service Request	5
Layout of Request Services Tab	6
Initiate a Service Request	7
Enter Payment Information	8
Manage a Lab/Group (for PIs/Lab Managers)	9
Access & Manage Your Lab/Group	9
Membership Requests & Fund Numbers Tab	10
Members Tab	12

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.

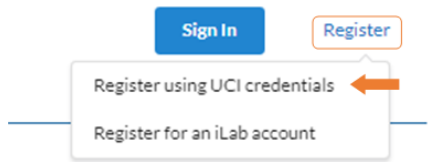
Types of User Accounts:

- 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 TMF core page:
https://uci.ilab.agilent.com/service_center/show_external/5747/transgenic_mouse_facility_tmf
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

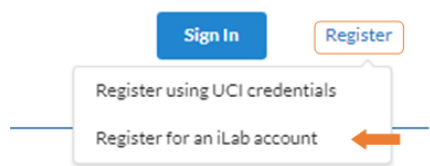
Note: If you are the PI, please send an email to cfccadmin@hs.uci.edu to request the creation of your Lab/Group in iLab.

A screenshot of the 'Register for iLab' form. The title is 'Register for iLab'. Below it 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 has five fields: 'PI/Group' (a dropdown menu with the text 'Please select your lab/PI ...'), 'First Name' (text input), 'Last Name' (text input), 'Email Address' (text input), and 'Phone Number' (text input). There is a blue 'Register' button at the bottom right. Three orange callout bubbles with numbers 1, 2, and 3 are present: 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 TMF 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 TMF core page:
https://uci.ilab.agilent.com/service_center/show_external/5747/transgenic_mouse_facility_tmf
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 but must reset your password.

1. Click [here](#) to reset your iLab password (use your UCI email address as your username)
2. Login [here](#) using your iLab username and password

Note: On initial login, set your account time zone, click Update, then log out once to set the change.
3. Select a core from the list of cores at UCI by clicking the Core Facilities list in the left-hand menu
4. Once on the core's page, click the About Our Core tab to learn more about the available services

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.

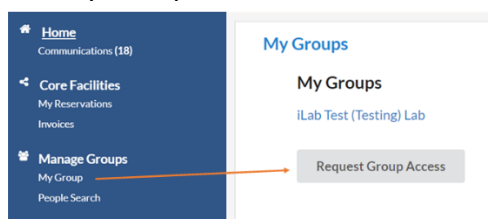
Core Name	Primary Contact	Email
Help Site Documentation Institution		
Flow Cytometry Facility	Itzel Jenkins	coreadmin.itzel.jenkins@ilabx.com
Proteomics Facility	Jayda Cormier	coreadmin.jayda.cormier@ilabx.com

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.

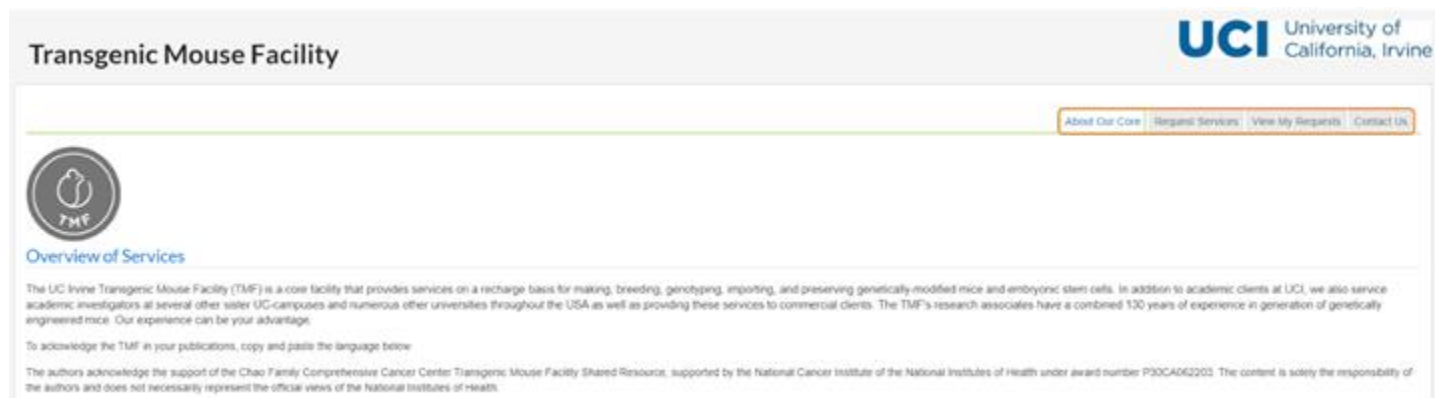
 The image shows a 'Request Group Access' pop-up window. It has a title bar 'Request Group Access'. Below the title bar are two dropdown menus. The first is labeled 'Institution' and has 'University of California Irvine' selected. The second is labeled 'Group' and is currently empty. At the bottom of the window are two buttons: 'Cancel' and 'Request Access'.

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

TMF 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
- **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

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/5747/transgenic_mouse_facility_tmf 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:

The screenshot shows the 'Request Services' tab of the Transgenic Mouse Facility website. The page has a header with the UCI logo and navigation links: 'About Our Core', 'Request Services' (highlighted), 'View My Requests', and 'Contact Us'. The main content area is titled 'Service Projects & Quote Requests' and contains several sections. A 'Start Here! (1)' section provides general information and a 'request service' button. Below this is a list of services including Cryopreservation, Rederivation and embryo reanimation, IVF service, and others. A 'Service list' section provides a detailed list of services and their prices. A search bar is located at the bottom of the page.

1. Service Projects & Quote Requests

2. Please submit an inquiry form to begin a conversation with the core. TMF will contact the client and initial consultation will be free of charge. The type of work is normally categorized in one of the service projects listed below. TMF will create a customized work plan based on the discussion with the client and assign it to the appropriate category. TMF will create the cost estimate in iLAB before the project's initiation. The project will only start upon both the client and the core agree.

3. Start Here! (1) General Inquiry (Start Here!)

4. request service

5. Service list

6. Search available services

7. TMF is UCI's core

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 TMF related to their service requests
3. **Service request titles and descriptions:** A listing of the available TMF service(s) you can request
4. **Initiate request:** click the Request Service button to initiate a request

The following frequently used TMF service requests can be initiated by the client:

- Start Here! General Inquiry – Clients should submit an inquiry form to begin a conversation with the core
- Clients who have specific information ready for the following services may directly initiate requests from the Request Service button:
 - Cryopreservation
 - Rederivation and Embryo Reanimation
 - In Vitro Fertilization

Note: All other services requests will be redirected to a page where you can submit a question about the particular service.

5. **Service list panel:** This panel lists the individual services TMF provides along with a price list
6. **Search available services:** Enter a service description (e.g., in vitro fertilization) 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 screenshot shows a web interface titled "General Inquiry". At the top, there is a header section with the following information: Request Name: TMI-GR-CID; Customer: Dom Researcher Lab: Lab Test (Testing) Lab-2; Email: dom.researcher@testlab.com; Phone: 5555555555. Below this is a red asterisk followed by a question: "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, NAFLD, IBD)? [Yes/No]". There is a text input field for the answer. Below this is a section titled "Forms and Request Details" with a sub-header "View Form: UCI TMI General Inquiry Form". The form contains several sections: "Inquiry Form" with a text area for "Please briefly describe your project goals." and a "Save Progress" button; "Attach any relevant information:" with a "please upload" button; "Please indicate any important timeline of milestones to consider (grant deadlines, progress report, etc.):" with a text area; and "Please save your form:" with buttons for "save completed form", "save draft of form", and "add service". At the bottom of the form, there is a "Cost" section with the text "The core will review your request and provide you with a quote for the requested service(s)". At the very bottom, there are three buttons: "submit request to core", "save draft request", and "Cancel".

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 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 there is agreement between you (the client) and the TMF core to proceed with the service request, you can add payment information to be used for the request from the View My Requests tab.

- Search for the service request you would like to add payment information to

Navigation: About Our Core | Request Services | **View My Requests** | Contact Us

Buttons: Reload Active Requests | active requests

Searching within active requests: Results in this tab are restricted by Status ([show details](#))
Please use the filter panels in the left-hand menu to drill down to requests of interest. You can also save filters to custom tabs! [Click here for more details.](#)

Hide Filters

Keywords: Go

▼ Status

- ☐ Processing (2)
- ☐ Proposed (2)
- ☐ Requested (1)
- ☐ Researcher Draft (2)
- ☐ Researcher in Agreement (1)
- ☐ Service Center in Agre... (2)

Displaying 16 out of 16 results. (Page 1 of 1)

date	for	service id	status	payment number	cost	
Aug 24 (Aug 24 2021)	Dom Researcher Lab Test/Testing/Lab 2	TMF-OR-30 General Inquiry Start Here!	Waiting for Core to Agree		\$0.00 (\$0.00)	
Aug 17 (Aug 17 2021)	Dom Researcher Lab Test/Testing/Lab 2	TMF-OR-29 Rederivation Rederivation and embryo reanimation	Processing		\$0.00 (\$0.00)	

- Click on the (dollar sign with pencil icon) to the far right of the service request to add payment information in a pop-up window

- If you are an Internal User, select a KFS Account from a drop-down that will contain all KFS Accounts assigned to you by your PI or Lab/Group manager. Select the KFS Account and click Save.
Note: If no Funds are available, you should contact your PI or Lab/Group manager to assign you one or more Funds.

Payment Information

Charge	Billing Status	KFS Account	Amount	
Selected charge(s) total: \$0.00				

Only charges with a pending billing status are displayed. Amount currently due: \$0.00

Update payment info for selected (1) charges

KFS Accounts: 100.0% **Select KFS Account**

100.0% Total Allocated

☒ Default to this payment method

payment notes

Save Cancel

- If you are an External User, you will typically enter a PO number or identify another form of payment in the text field and click Save. The text field at the bottom of the window lets you add any notes (optional) for the core.

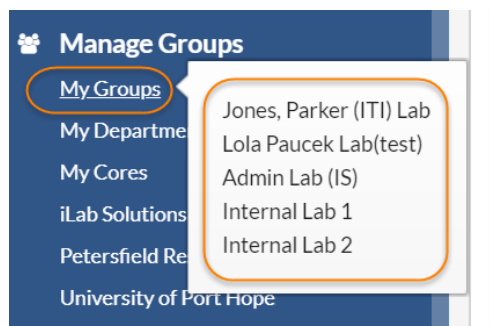
For more information visit [iLab Payment Methods](#)

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

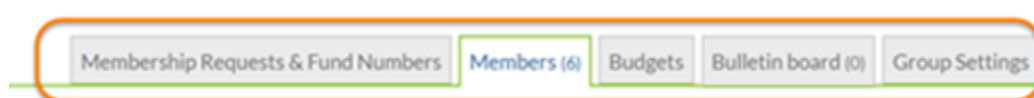
The Lab/Group interface is the central hub for PIs and Lab/Group Managers to manage the Lab/Group members, access to funding, monitor budget and modify various settings. In iLab, every user must be a member of at least one Lab/Group to be able to request services and make reservations.

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:

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**: Includes a green checkmark and the text 'No Access Requests require approval'.
- 2 Manage Fund Numbers**: Includes a link 'Customize Fund number Grid', a tip 'Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.', and a table with columns for Name, Default Fund Number, and three fund numbers (22123, 23544, 26435). The table lists Sample PI, Sample Manager, Sample Member 1, and Sample Member 2.
- 3 Manually add a new Fund Number**: A link to add new fund numbers.
- 4 Manage Fund Numbers**: A link to manage fund numbers.

The table in section 2 shows the following data:

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

Below the table, it says 'Showing 1 to 4 of 4 entries' and has pagination links: First, Previous, 1, Next, Last.

- 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 the 'Membership Requests' section. At the top, there is a navigation bar with 'Membership Requests & Fund Numbers' selected. Below the navigation bar, there is a section titled 'Membership Requests'. It includes a warning icon and the text 'An Access Request requires approval'. Below this, there is a table with columns for Date, Name, Email, and Actions. The table shows one request from 'Mar 09 '18' by 'Minaal Gounder' with email 'request1@gmail.com'. The Actions column has 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	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Manager	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sample Member 1	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sample Member 2	None	<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: first initial followed by last name of PI in capital letters (e.g., ARESEARCHER)
The project must match what exists in KFS. Please contact your fiscal officer for more information.
- Title: account title of the KFS account (max 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	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sample Manager	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Member 1	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Member 2	None	<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 is a navigation bar with tabs: 'Membership Requests & Fund Numbers', 'Members (7)', 'Budgets', 'Bulletin board', and 'Group Settings'. The 'Members (7)' tab is selected and highlighted with an orange circle.

Below the navigation bar, there are two main sections:

- Lab-wide approval settings:** This section includes a header with a pencil icon and the text 'Click the pencil icon next to the person below whom you would like to make the financial approver.' Below this, there are 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 at the bottom of this section.
- Lab members and settings:** This section has two tabs: 'Active Members' and 'Expired Members'. The 'Active Members' tab is selected. It contains 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 has a pencil icon for editing and a trash icon for deleting.

At the bottom of the 'Lab members and settings' section, there are two buttons: 'Add New User' and 'Link Existing User'.

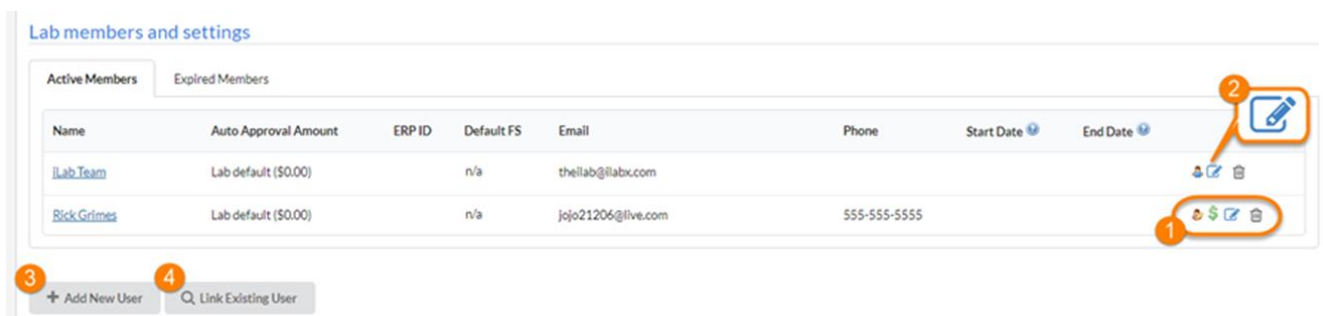
1. **Lab-wide approval settings:** Set the financial approval thresholds for the group altogether
 2. **Lab member and settings:** Add/remove users from the group and manage their current memberships
- **Set Approval Thresholds**
Financial approvals are required from lab administrators when the cost 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 shows the 'Default auto-approval threshold' input field with the value '5000.0' and a warning icon. The 'Cost overage buffer' input field has the value '100.0' and an information icon. A 'save approval settings' button is at the bottom.



- **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.



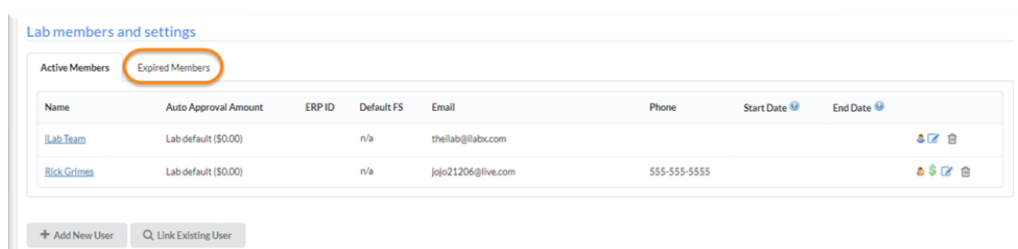
1. Member icons:

- **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.

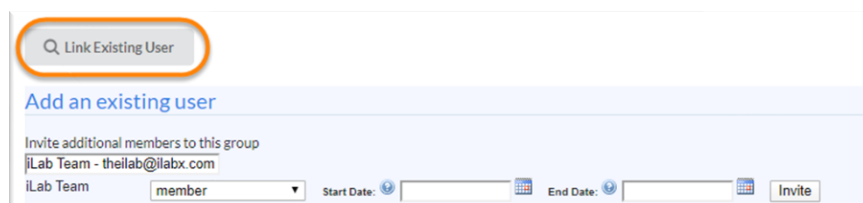


- **Save/Cancel:** Use this to save or cancel any change made to membership settings

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](#)