Transgenic Mouse Facility (TMF)
iLab User Guide
Revised 8/26/2021

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 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
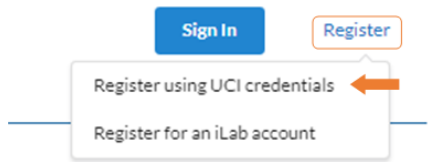
3. You will be directed to the DUO authentication page where you will need to enter your UCInetID and password

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 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 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
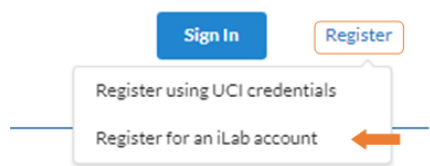
3. You will be asked to provide your institution email address, personal information (name, phone, role), PI contact information, and billing information
   - If your institution and PI already exist in iLab, your account is automatically created
   - If your institution or PI does not exist, your account 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.


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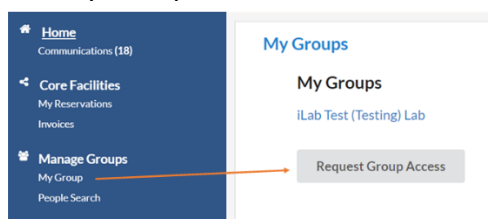
            Complete the required fields in the pop-up window: Institution (University of California Irvine) and Group (PI's last name); Click Request Access (blue button) and an email notification will be sent to the PI requiring approval for member to join the lab.


            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

<u>Overview of Using a Core</u>

TMF in iLab looks similar to this:
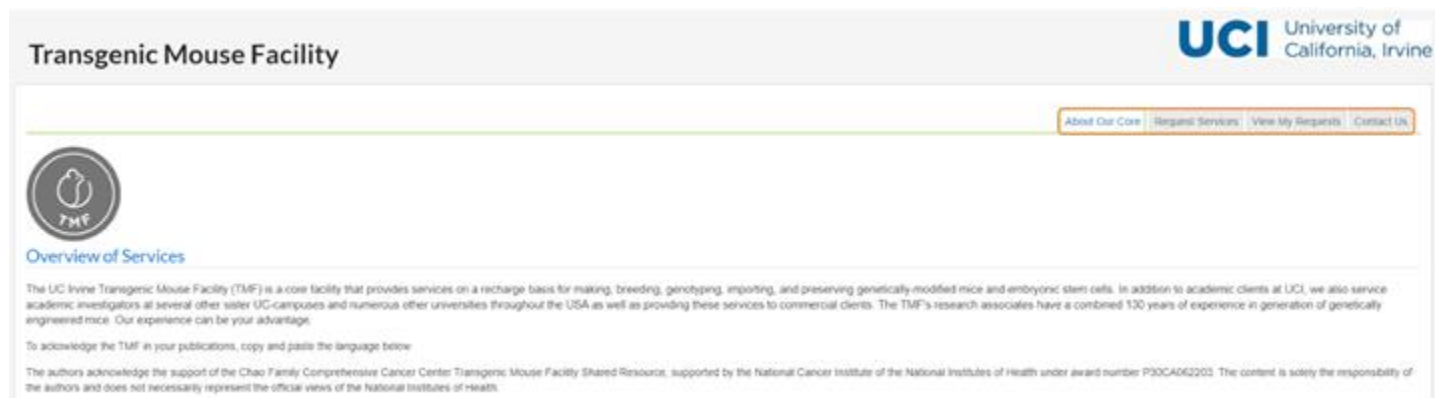
Each Core is organized into tabs across the top of the page (tab names may vary by core). The most common tabs are:

- **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:

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 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

- 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.

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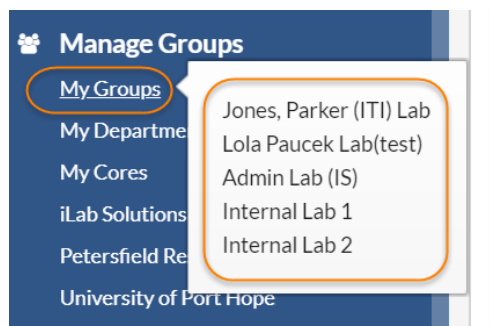
To manage your lab/group, utilize the various tabs across the top of the iLab screen (described in detail below):
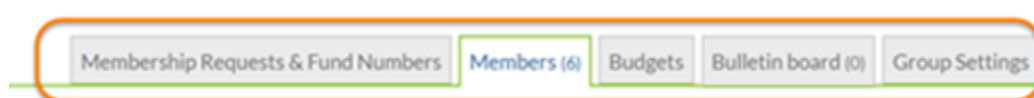
Membership Requests & Fund Numbers Tab

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

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.

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*	☑	☐
Sample Manager	*None*	☑	☑
Sample Member 1	*None*	☐	☑
Sample Member 2	*None*	☑	☐

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

KFS Account: [   ] [Add]

To add a Fund Number, type the new information in the correct format:
  o 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.
  o 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.
  o Title: account title of the KFS account (max 50 alphanumeric characters)
  o 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*	☑	☐	☐
Sample Manager	*None*	☑	☑	☐
Sample Member 1	*None*	☐	☑	☐
Sample Member 2	*None*	☑	☐	☐

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.
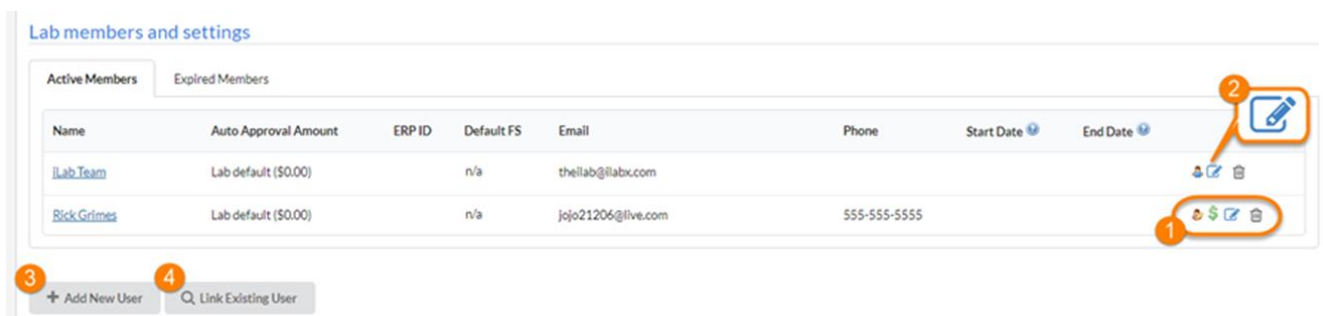

1. **Member icons**:
   - **Role** (person icon): Hover your mouse over this icon to display the role of the user

     (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

- 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.
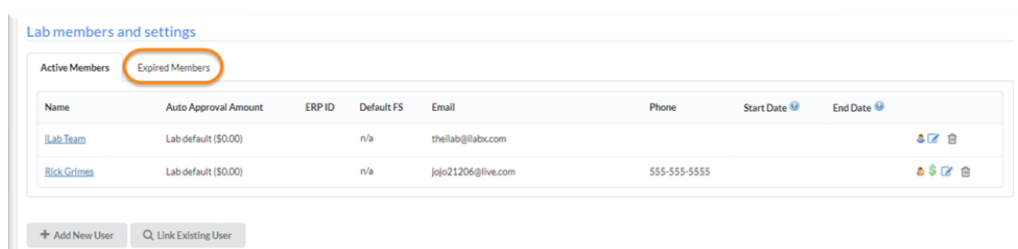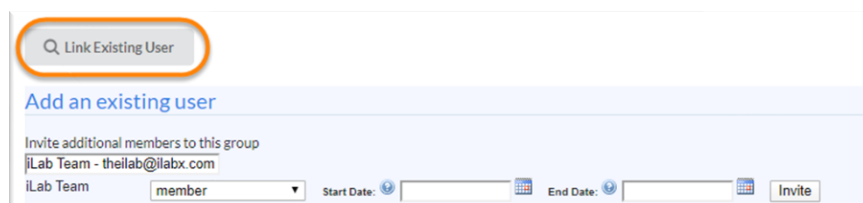

- o **Save/Cancel**: Use this to save or cancel any change made to membership settings

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

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