



Biobehavioral Shared Resource (BBSR)

iLab User Guide

Revised 11/24/2021

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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.

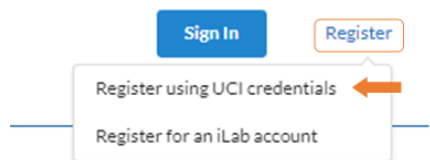
Types of User Accounts:

- 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 BBSR core page: https://uci.ilab.agilent.com/service_center/show_external/5720
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

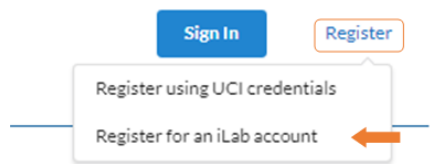
Note: If you are the PI, please send an email to cfccadmin@hs.uci.edu to request the creation of your Lab/Group in iLab.

A screenshot of the 'Register for iLab' form. The title is 'Register for iLab'. Below the title 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', 'Last Name', 'Email Address', and 'Phone Number'. There is a blue 'Register' button at the bottom right. Three orange callout bubbles with numbers 1, 2, and 3 are overlaid on the form. Callout 1 points to the 'PI/Group' dropdown. Callout 2 points to the 'Phone Number' field. Callout 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 BBSR 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 BBSR core page: https://uci.ilab.agilent.com/service_center/show_external/5720
2. In the upper-right-hand corner of the screen select Register and click the Register for an iLab Account option



3. You will be asked to provide your institution email address, personal information (name, phone, role), PI contact information, and billing information
 - If your institution and PI already exist in iLab, your account is automatically created
 - If your institution or PI does not exist, your account will be sent to the iLab support team to be approved (allow 24 hours for your account to be reviewed/approved)

Pre-Registered Internal Users: You have been pre-registered for an iLab account and can sign in using UCI credentials.

1. Navigate to the BBSR core page: https://uci.ilab.agilent.com/service_center/show_external/5720
2. Sign in using UCI credentials
3. You will be directed to the DUO authentication page where you will need to enter your UCInetID and password
4. Once you have entered your credentials, click the Login button

For more information visit [Registering with iLab](#)

Navigate iLab

iLab uses a navigation structure that relies on a left-hand navigation panel (typically hidden) for access to all high-level system areas, combined with several navigation elements at the top of the screen that provide access to various system functions. The main area of the screen contains the currently active interface.

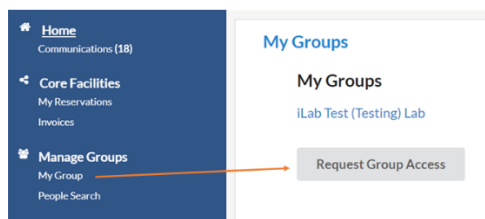
Core Name	Primary Contact	Email
Help Site Documentation Institution		
Flow Cytometry Facility	Itzel Jenkins	coreadmin.itzel.jenkins@ilabx.com
Proteomics Facility	Jayda Cormier	coreadmin.jayda.cormier@ilabx.com

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.

Request Group Access

Institution*

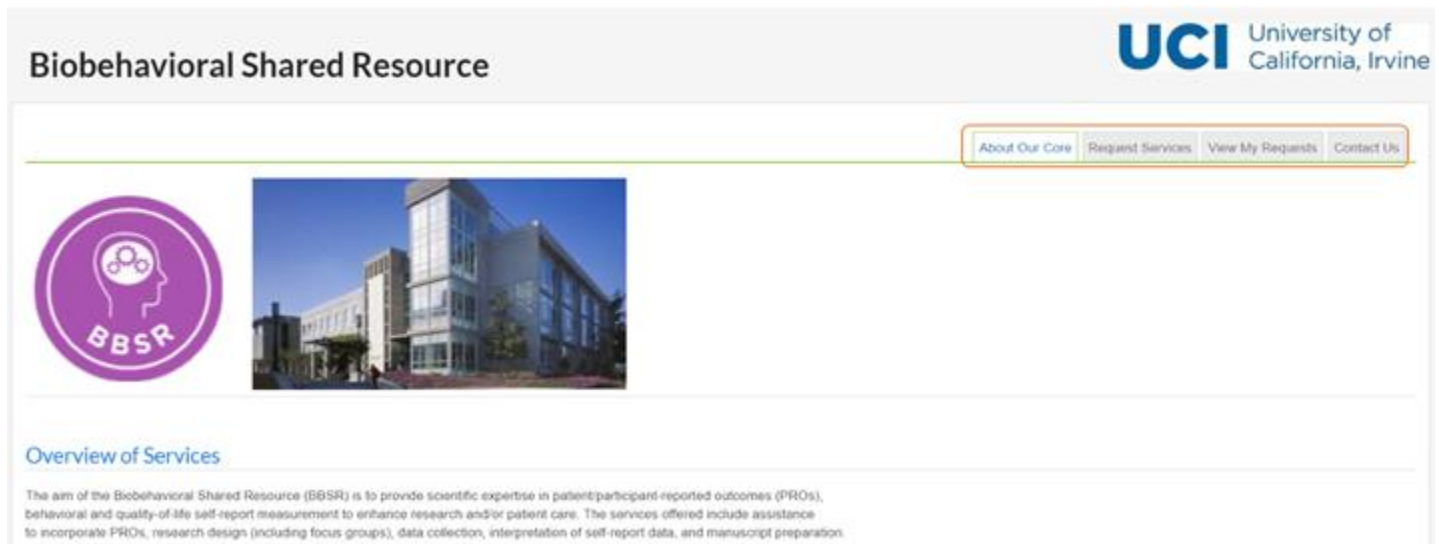
Group*

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

BBSR in iLab looks similar to this:



The aim of the Biobehavioral Shared Resource (BBSR) is to provide scientific expertise in patient/participant reported outcomes (PROs), behavioral and quality-of-life self-report measurement to enhance research and/or patient care. The services offered include assistance to incorporate PROs, research design (including focus groups), data collection, interpretation of self-report data, and manuscript preparation.

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/5720 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 'Biobehavioral Shared Resource' page. At the top right is the UCI University of California, Irvine logo. Below the logo is a navigation bar with 'Request Services' highlighted. A dropdown menu is open under 'Request Services', showing 'Service Projects & Quote Requests' (callout 1). Below this is a section titled 'To begin work with the UCI Biobehavioral Shared Resource Service Facility:' with a list of five steps (callout 2). Below the list is a 'Consultation Request' section (callout 3) with a 'request service' button (callout 4). Below that is a 'Service list' section (callout 5) with a search box (callout 6) and a table of services (callout 7). The table lists services and their prices per UCI user.

Service	Price (UCI Users)
Data Analysis	\$132.00
Data Collection Strategies	\$132.00
Focus Groups/Qualitative Interviews	\$132.00
Integration of PROs into Study	\$132.00
PRO Data Entry	\$49.00
PRO Instrument Development	\$132.00
PRO Instrument Selection	\$132.00

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 BBSR related to their service requests
3. **Service request titles and descriptions:** A listing of the available BBSR service(s) you can request
4. **Initiate request:** click the Request Service button to initiate a request
5. **Service list panel:** This panel lists the individual services BBSR provides along with a price list
6. **Search available services:** Enter a service description (e.g., data analysis) 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:

Consultation Request

Request Name: [SSR-RR-[CID]]
Customer: Rob Researcher Lab: iLab Test (Testing) Lab
Email: julie.miller@labsolutions.com Phone: (999)999-999

• 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, NASH, IBD)? [Yes/No] []

Forms and Request Details (see bottom of list to add items to this request)

[View Form](#) Biobehavioral Shared Resource Service Agreement Not Started

⚠ Please fill out any forms that are highlighted in red.

Cost

The core will review your request and provide you with a quote for the requested service(s).

Payment Information

Please enter the po number.
You will have the opportunity to review the quote before being billed.

% po number

100.0% Total Allocated

[Split Charge](#)

[submit request to core](#) [save draft request](#) [Cancel](#)

The interface has three sections:

1. **Forms and Request Details:** This section will contain any forms that need to be completed as part of the service request
2. **Cost:** This section is for core use only and may reflect an initial cost estimate for the service request, or it may be empty and later updated by the core after submission
3. **Payment Information:** This section is where payment information can be provided (described below)

Once you have completed these sections, click one of the buttons at the bottom of the interface to proceed:

- **Submit request to core:** Submit the request for the core to review
- **Save draft request:** Close the Service Request interface and save the current request as a draft (it can be revisited and completed from the View My Requests tab)
- **Cancel:** Cancel the request (all completed information will be lost)

Note: If you (accidentally) refresh your browser while completing a service request, it will be saved as a draft and can be found on the View My Requests tab.

For more information visit [iLab Using a Core](#)

Enter Payment Information

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

- If you are an Internal User, the Fund Number can be entered manually or selected from a drop-down that will contain all KFS Accounts assigned to you by your PI or Lab/Group manager

Note: If no Funds are available, you should contact your PI or Lab/Group manager to assign you one or more Funds.

- If you are an External User, you will typically enter a PO number or identify another form of payment in this field

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

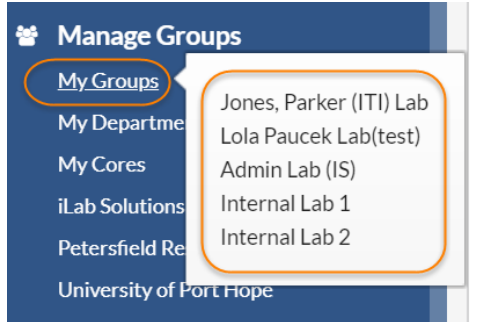
For more information visit [iLab Payment Methods](#)

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

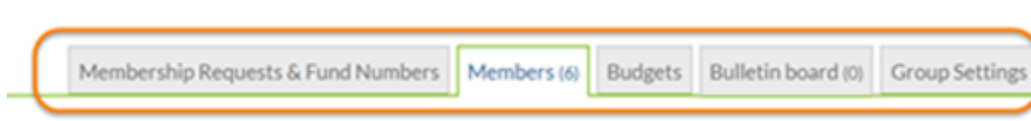
The Lab/Group interface is the central hub for PIs and Lab/Group Managers to manage the Lab/Group members, access to funding, monitor budget and modify various settings. In iLab, every user must be a member of at least one Lab/Group to be able to request services and make reservations.

Access & Manage Your Lab/Group

To access your group, either hover over the My Groups link on the left-side navigation and then select the lab from the pop-up or click on the My Groups link and then select the lab from the list on the next page (if you have only one group, clicking the link will take you straight there).



To manage your lab/group, utilize the various tabs across the top of the iLab screen (described in detail below):



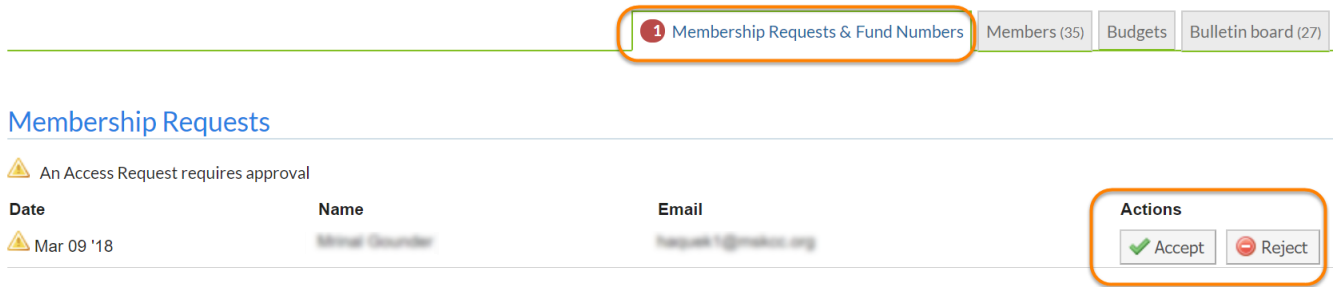
Membership Requests & Fund Numbers Tab

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

1. **Membership Requests:** Accept or decline users that are looking to become members of your lab
2. **Manage Fund Numbers:** The main purpose of this interface is to assign/unassign access to funds for each of your group members (the Fund Grid)
3. **Manually add a new Fund Number:** This interface lets you add new fund numbers to your Research Group

- **Accept/Decline Membership Requests**

During the registration process, users can select the PI they work with. When a user selects you as their PI, you will see a membership request at the top of the page.



You can choose to Accept or Reject the membership request. If accepted, the user will be added to your group/lab. You will then be able to assign funding to your user.

- **Assign/Unassign Fund Numbers**

Adding or removing fund numbers for each of the lab members can be done in the Manage Fund Numbers section of the tab. To assign a fund number to a user, click the check box of the fund number in the row for that user. To remove a fund number, uncheck the box for that user.

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**



To add a Fund Number, type the new information in the correct format:

- **Account:** 2 alpha, 5 numeric (e.g., SP12345)
The account must exist in KFS. If it does not, your fiscal officer can provide this information.
- **Project:** Project refers to the Project Code in KFS (this is an optional field)
The project must match what exists in KFS. Please contact your fiscal officer for more information.

- Title: account title of the KFS account (this is an optional field)
The title has a max of 50 alphanumeric characters.
- KFS Account: autogenerated when Account and Project fields are completed; click Add to add the fund number

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	<i>None</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sample Manager	<i>None</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Member 1	<i>None</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Member 2	<i>None</i>	<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 are navigation tabs: 'Membership Requests & Fund Numbers', 'Members (7)', 'Budgets', 'Bulletin board (8)', and 'Group Settings'. The 'Members (7)' tab is selected and highlighted with an orange circle.

Section 1: Lab-wide approval settings. This section includes a note: 'Click the pencil icon next to the person below whom you would like to make the financial approver.' Below this are two input fields: 'Default auto-approval threshold' set to '\$ 50000.0' and 'Cost coverage buffer' set to '\$ 100.0'. A 'save approval settings' button is located below the fields.

Section 2: Lab members and settings. This section has two sub-tabs: 'Active Members' (selected) and 'Expired Members'. Below the sub-tabs is 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:

Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date	End Date
Jewell Wilkinson	Lab default (\$50,000.00)		instadmin.jewell.wilkinson@ilabx.com			
Abdul Walker	Lab default (\$50,000.00)		instadmin.abdul.walker@ilabx.com			
Nathanael Dickinson	Lab default (\$50,000.00)		instadmin.nathanael.dickinson@ilabx.com			
Domenico Carroll	Lab default (\$50,000.00)		instfmgtr.domenico.carroll@ilabx.com			

At the bottom of the 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.

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 ⚠

Cost overage buffer ⚙

- **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.

Lab members and settings

Active Members | Expired Members

Name	Auto Approval Amount	ERP ID	Default FS	Email	Phone	Start Date	End Date	
iLab Team	Lab default (\$0.00)		n/a	thelab@ilabcc.com				👤 📄 🗑
Rick Grimes	Lab default (\$0.00)		n/a	jojo21206@live.com	555-555-5555			👤 💰 📄 🗑

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.

Name	Auto Approval Amount	ERP ID	Default FS	Email	Phone	Start Date	End Date
iLab Team	Lab default (\$0.00)		n/a	theilab@ilabc.com			
Rick Grimes	Lab default (\$0.00)		n/a	jojo21206@live.com	555-555-5555		

- **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.

Q Link Existing User

Add an existing user

Invite additional members to this group

iLab Team - theilab@ilabx.com

iLab Team member Start Date: End Date: Invite

For more information visit [iLab Managing a Group](#)