

Genomics and Bioinformatics Core Facility

iLab User Guide—Internal Users

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Overview

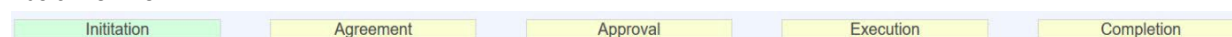
CORES, the core facility ordering system was retired on January 1, 2021. The Notre Dame Core Facilities transitioned in waves throughout 2020 to the Agilent Technologies iLab Core Facility Management software, an online system to streamline the process of ordering and billing for core service requests. To prepare the Genomics and Bioinformatics Core Facility (GBCF) users, this guide will reference Notre Dame specific information including how to register, create and manage a service request, schedule a reservation for sample drop-off/pick-up, manage and request group access, communicate with the core using ‘comments’ tool, and locate user support. To read more about the University’s core facilities transition to the new software management system, [click here](#).

iLab Core Facility Management software provides increased functionality for the GBCF to improve project management, project cost-tracking, and scheduling of sample delivery. All on-campus core facility users are required to register in iLab through [ND iLab Login page](#) using [Notre Dame Research \(NDR\) log-in instructions](#) or this GBCF user guide. To read more about Notre Dame Research (NDR) announcement, visit the [Core Facilities and Resources page](#).

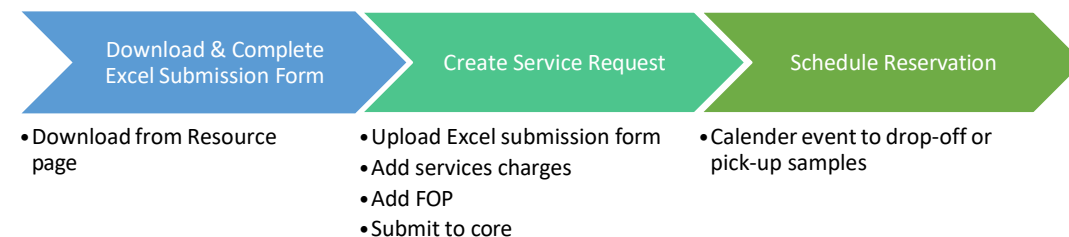
Periodically you will receive a survey from the GBCF regarding your experience interacting with the GBCF iLab service requests and calendars. Your feedback is important to us as we are continuously striving to improve our process and maintain a high quality of service.

Workflows for GBCF Users in iLabs

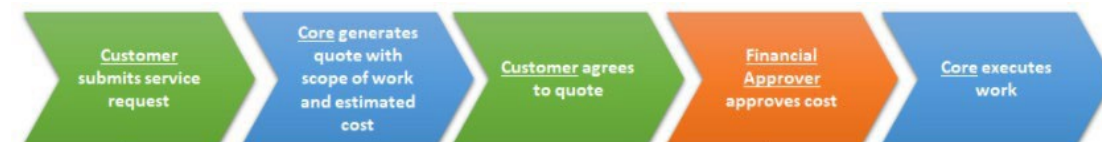
Basic Workflow



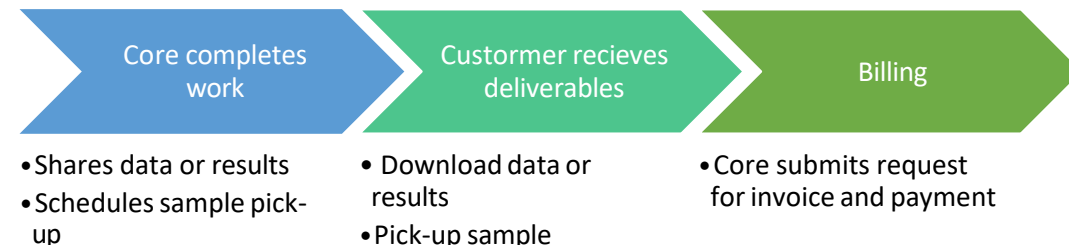
Initiation Workflow



Agreement, Approval, Execution Workflow



Completion



University of Notre Dame FAQ's

Q: What browser is compatible and best to use to view iLab?

A: [Google Chrome](#) is strongly recommended. Safari is supported.

Q: Who should I contact at my institution for financial questions?

A: ndcores@nd.edu

Q: If a fund is not listed in the Payment Information section when creating a service request, who should I contact?

A: ndcores@nd.edu

Q: If a user is not assigned funds, where do I send them?

A: The user should first contact their PI and/or lab manager. If they need additional help, contact ndcores@nd.edu.

Q: Who do I contact for registration questions?

A: ndcores@nd.edu

Q: What are the steps for a 'Standard' service request?

A: For standard services, the user should

- **Excel Submission Form:** Download and complete all fields. The Core has changed show it distributes labor; therefore having all the information is important when your order is transferred from one staff member to another.
- **Service Request in iLab:** Initiate (Start) a service request in iLab. Complete the custom form, click "Add selected services" button to add charges to your request. Review the total cost and payment information (FOP). Save completed form and Submit request to Core.
- **Schedule Reservation:** Reserve a time (2-hrs in advance) in the Sample Processing calendar to drop-off your samples.
- **Comments tools:** Use the 'comments' tool in iLab to communicate with us about your request. Do not send a separate email to genomics@nd.edu or an individual staff member to avoid miscommunication or your message getting "buried" in our email inbox.

Q: What are the steps for a 'Next-Gen' or 'Single-cell' service request?

A: For standard services, the user should

- **Excel Submission Form (if applicable):** Download and complete all fields. The Core has changed show it distributes labor; therefore having all the information is important when your order is transferred from one staff member to another.
- **Service Request in iLab:** Initiate (Start) a service request in iLab. Complete the custom form, click "Add selected services" button to add charges to your request. Review the total cost and payment information (FOP). Save completed form and Submit request to Core.
- **Approval by Core:** Wait for the Core to review your request and generate a workflow. The Core staff will generate a quote, establish a project timeline, and determine after what date you may reserve a sample drop-off time. *We want to avoid samples getting lost or misplaced if too much time passes between initiation and execution of work.*

Researcher: How to Get Started

To begin submitting requests and scheduling reservations through iLab, you will need to register and create an account. All on-campus core facility users are required to register in iLab to use the system; registration is a one-time process as discussed below.

Once you are registered, the system will enable you to:

- Submit service requests
- Schedule reservations for sample delivery
- Provide required approvals
- Monitor progress of requests and reservations
- Communicate with core using ‘comments’ tool
- Request access to additional PIs/Groups
- Notification or instructions to access Results

iLab accounts are intended for University of Notre Dame researchers, including:

- Primary Investigators
- Research professionals and staff
- Professional students

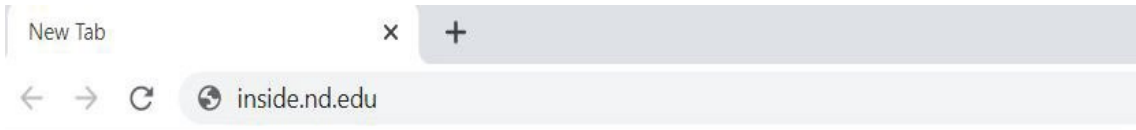
iLab registration workflow has two alternative models:

Model 1	Model 2
<p>Researcher</p> <ul style="list-style-type: none"> • creates a new account for the first time; • waits for approval. 	<p>Primary investigator</p> <ul style="list-style-type: none"> • creates account for the first time; • selects and approves “my group” membership(s) of researchers; • assigns FOP to researcher(s).
<p>Primary investigator</p> <ul style="list-style-type: none"> • receives notification of request to join “my group”; • creates account for the first time; • approves membership; • assigns FOP to researcher. 	<p>Researcher</p> <ul style="list-style-type: none"> • receives notification of approval; • creates a new account for the first time; • submits service request; • schedules reservation to deliver sample.
<p>Researcher</p> <ul style="list-style-type: none"> • receives notification of approval; • creates service request; • schedules reservation to deliver sample. 	

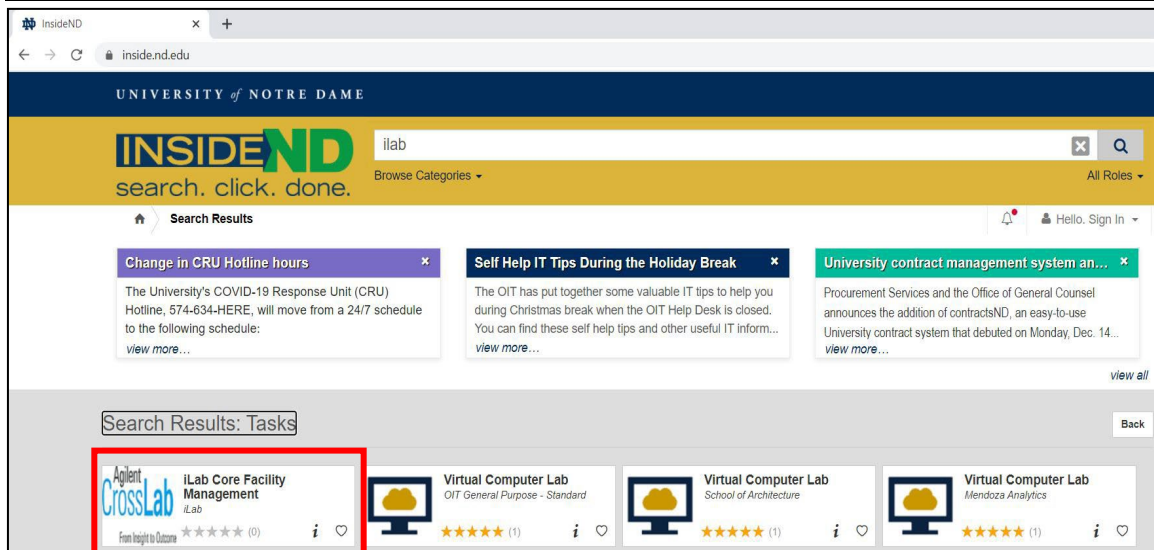
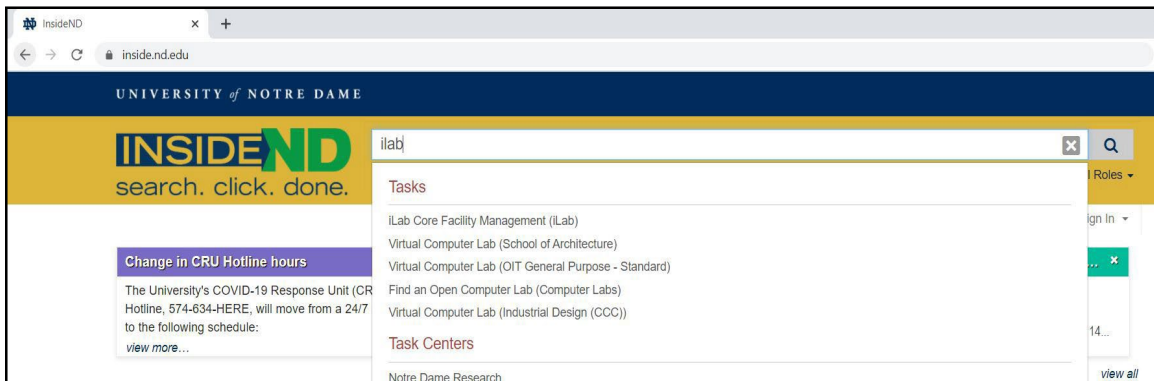
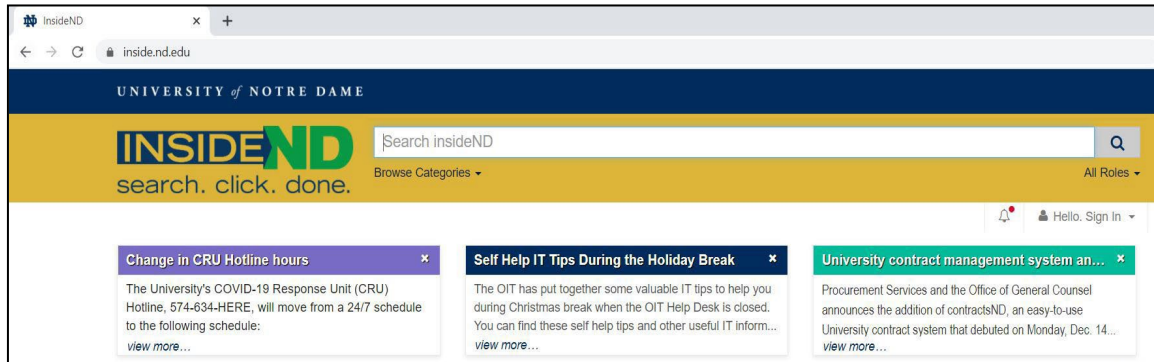
Register for an iLab account (Researcher)

To get started, you must register for an account:

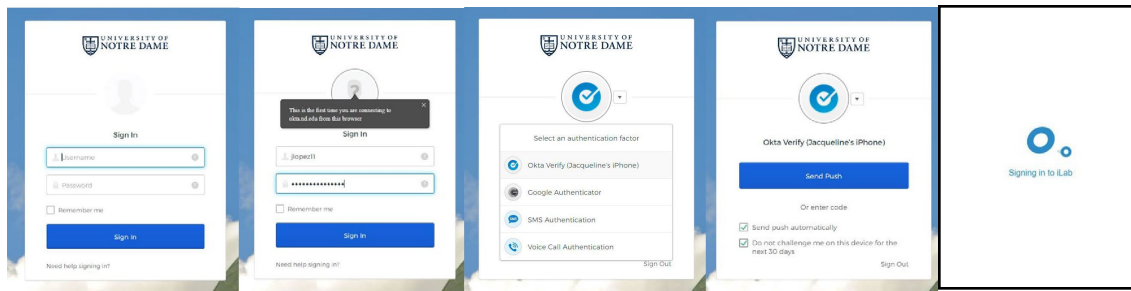
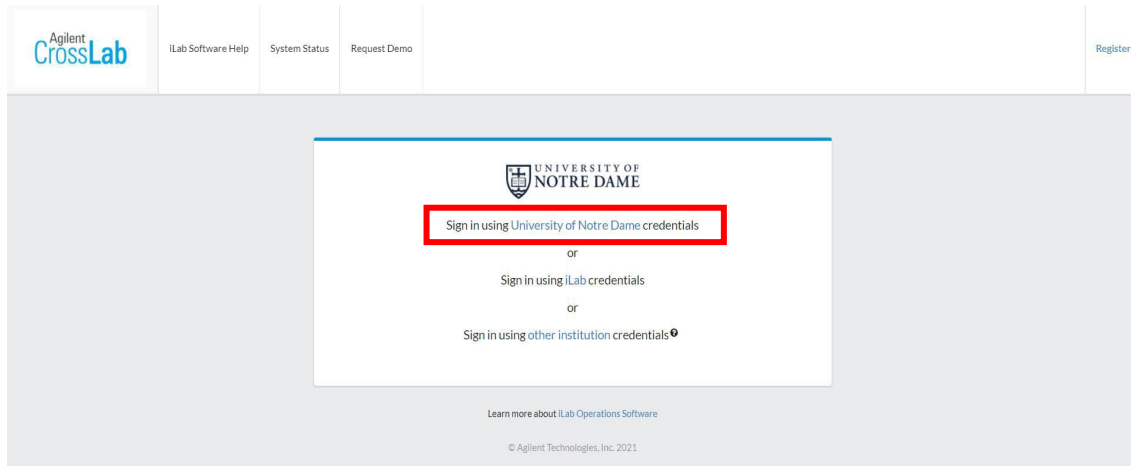
1. Open Chrome or Safari web browser. Go to [InsideND](https://inside.nd.edu) by typing “inside.nd.edu” into the address bar.



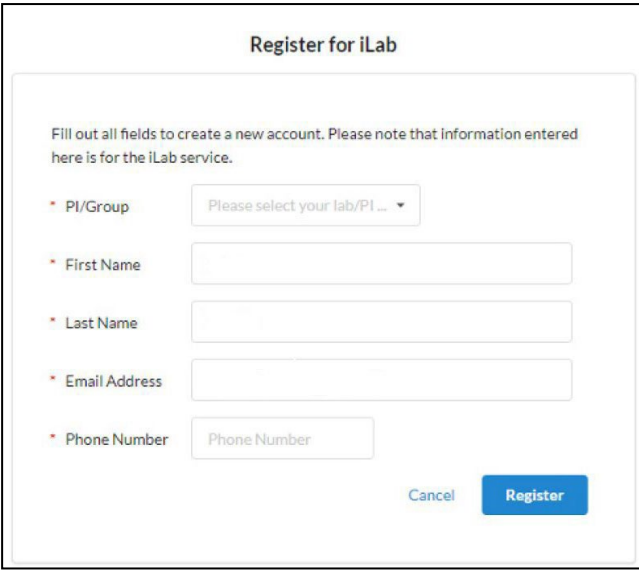
2. Once InsideND page loads, type “iLab” into the Search InsideND field. A list of search results will appear as you type. We recommend disregarding this list of results. Instead, press “enter” or “return” on your keyboard. The iLab task icon will appear in Search Results: Task section. Click on the iLab task icon.



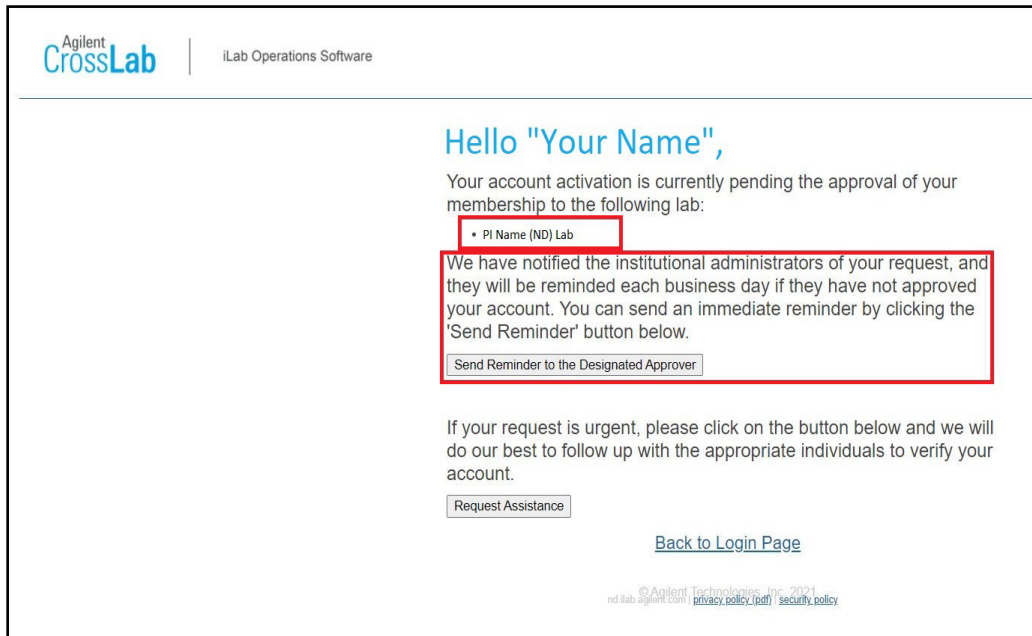
- After clicking the iLab Task icon, you are directed to the Agilent Cross Lab log-in page. Select “Sign-in using University of Notre Dame credentials”. ND’s Single Sign-On (SSO) will appear. Enter your ND NetID and ND password. If this is your first time connecting from this browser, select your authentication factor. Send push. (Optional: You may select to “send push automatically” and/or “do not challenge me on this device”.) If successful, you will see the “Signing into iLab” progress icon.



- Once the page reloads, you are directed to the iLab Registration page. Complete the fields. Click “Register”.
 - PI/Lab:** Request to join the PI/Lab who owns the funds (FOPs) that will be charged for services.
 - First Name:** This field should be populated. If incorrect or empty, enter your first name.
 - Last Name:** This field should be populated. If incorrect or empty, enter your last name.
 - Email Address:** This field should be populated. If incorrect or empty, enter your ND email.
 - Phone Number:** The field should be populated. If incorrect or empty, enter preferred number.

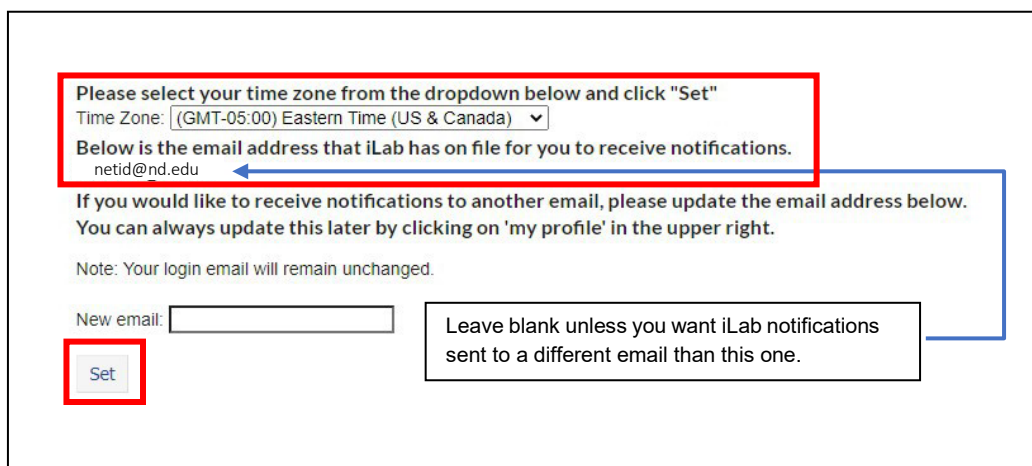


- Once your registration has been submitted, you will see the Agilent CrossLab Notification on the page. Your PI will receive a notification that you have requested membership to join their lab group in iLab. Your PI will need to approve your membership and assign at least one FOP for your use before you can log into the iLab system. *Close your browser. If your attempts to log into iLab bring you back to this page, contact your PI or click "Send Reminder to the Designated Approver". Do not click "Request Assistance"; it will direct you to Agilent iLab Support. For help with registration, contact ndcores@nd.edu.*



- After your PI accepts your request to join their Group, the next time you log-into iLab, you are asked to confirm your time zone and verify your email to receive iLab notifications. Click "Set". *If you want to notifications sent to an alternative email, enter it into the field; else leave it blank.*

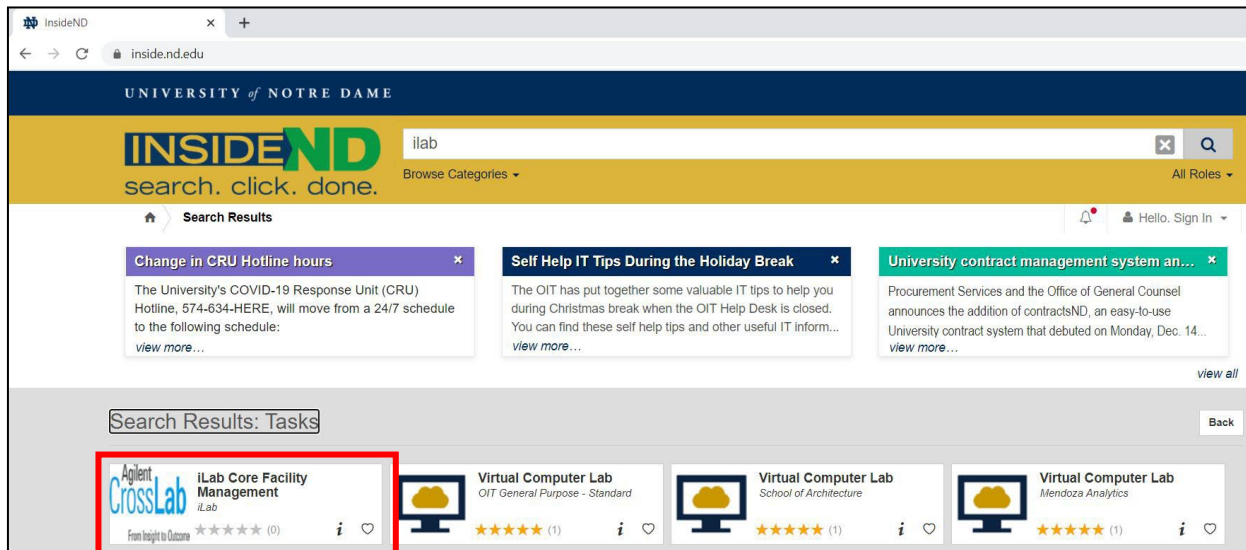
Note: If your PI is classified as "emeritus" or another limited affiliation with the university and their attempt to login via Okta verification fails, then they will need to submit a request to access iLab to ndcores@nd.edu.



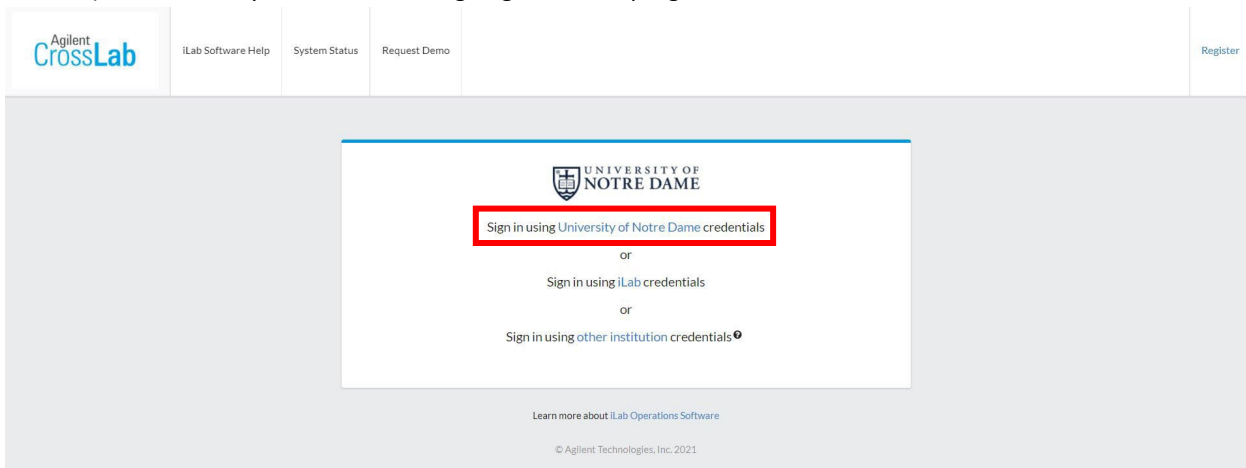
Single Sign-On (SSO) into iLab (Researcher)

Once you have been accepted into a PI's lab, you can sign into the iLab software.

1. Open Chrome or Safari web browser. Go to InsideND by typing "inside.nd.edu" into the address bar.
2. Once InsideND page loads, type "iLab" into the Search InsideND field. A list of search results will appear as you type. We recommend disregarding this list of results. Instead, press "enter" or "return" on your keyboard. The iLab task icon will appear in Search Results: Task section. Click on the iLab task icon.



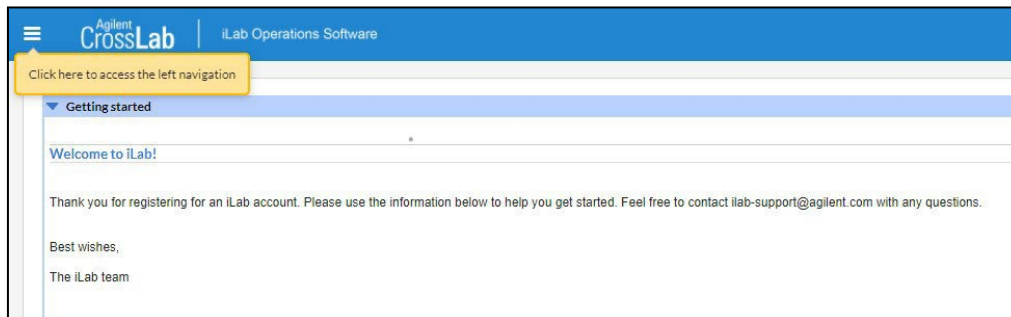
3. After clicking the iLab Task icon, you are redirected to Agilent Cross Lab log-in page. Select "Sign-in using University of Notre Dame credentials". ND's Single Sign-On (SSO) will appear. Enter your ND NetID and ND password. If this is your first time connecting from this browser, select your authentication factor. Send push. (Optional: You may select to "send push automatically" and/or "do not challenge me on this device".) If successful, you will see the "Signing into iLab" progress icon.



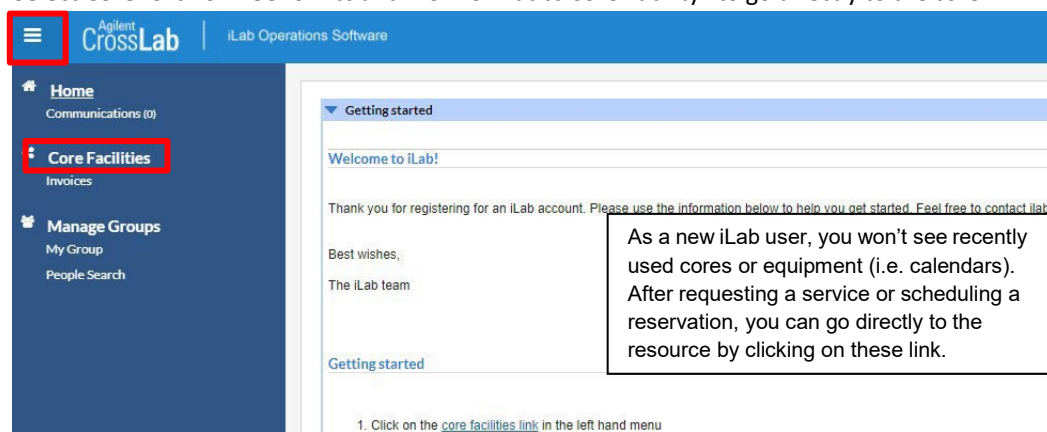
Navigate to Genomics Core Facility in iLab (Researcher)

Once you have been accepted into a PI's lab, you can sign into the iLab software.

1. [Perform Single Sign-On into iLab](#). If sign-in is successful, you will see your iLab Home Section. Here you can find a summary of information about your account, including links to Recently Used Cores, Recently Used Equipment (i.e. calendar), iLab email and message communications, active requests, and future scheduled reservations. To read more about iLab Home Section, go to [iLab Help Site Home Section](#).



2. Click on the three horizontal bars at the top-left to show the left-hand navigation panel (hidden). To learn more about the navigation panel, go [iLab Help Site Navigation Panel](#).
 - a. **Core Facilities:** Click on this section header to list and search all ND core facilities.
 - b. **View and Search:** View Cores at my institution. Type “Genomics and Bioinformatics Core Facility” into search table field. The main area will display a filtered list based on the search.
 - c. **Select Core:** Click on “Genomics and Bioinformatics Core Facility” to go directly to the core.



Core Facilities

UNIVERSITY OF NOTRE DAME

View: Cores at My Institutions Search table...

Core Name	Primary Contact	Email	Phone Number
University of Notre Dame			
Aero-Optics Laboratory	Mike Zerik	mzerik@nd.edu	1-1189
ASEND Facility	Karl Cronberger	kcronber@nd.edu	248-797-7085
Biophysics Instrumentation Core Facility	Giselle Jacobson	gjacobso@nd.edu	574-631-3556

Core Facilities

UNIVERSITY OF NOTRE DAME

View: Cores at My Institutions Genomics and Bioinformatics

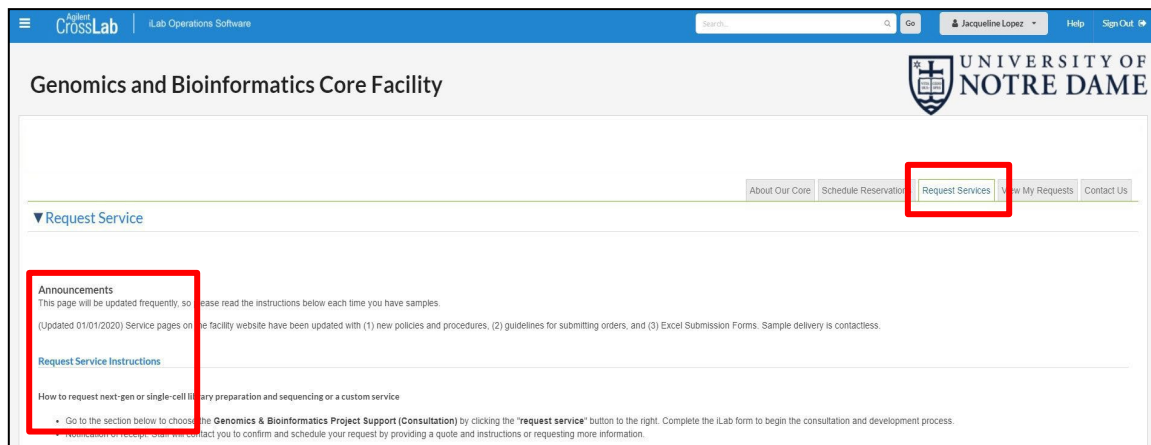
Core Name	Primary Contact	Email	Phone Number
University of Notre Dame			
Genomics and Bioinformatics Core Facility	Michael Pfender	mpfende@nd.edu	574-631-3551

Displaying 90 of 1 results

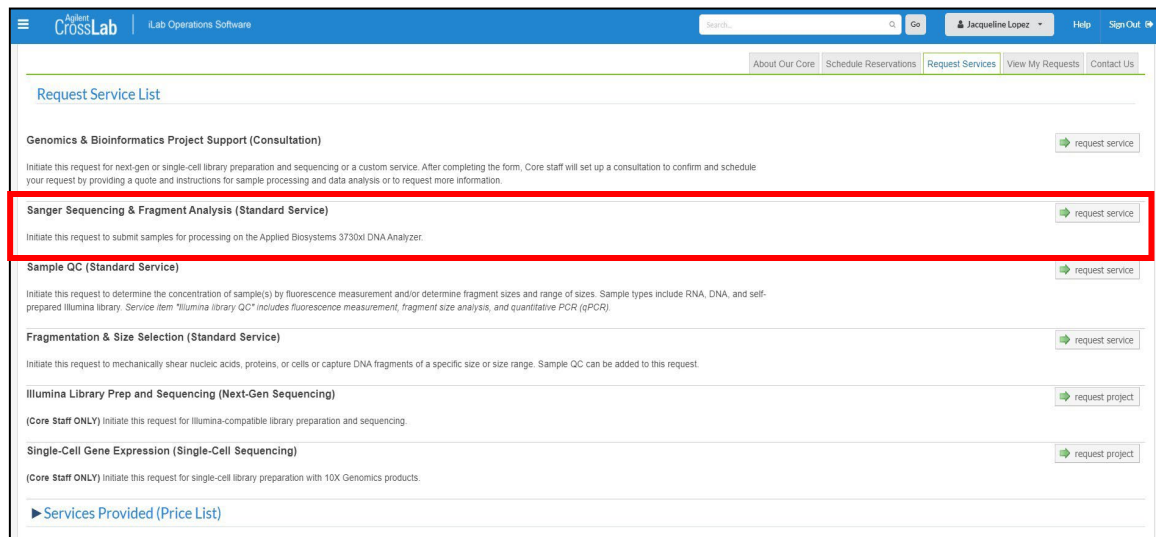
Create a Service Request (Researcher)

Once you have been accepted into a PI's lab and assigned a FOP, you can "Request Services".

1. [Single Sign-On \(SSO\) into iLab.](#)
2. [Navigate to Genomics Core Facility in iLab.](#)
3. Once the page loads, you are directed to the Genomics and Bioinformatics Core Facility **Request Services** tab, where you can see the services our core provides and where you can initiate requests.
 - a. **Announcements:** This section will be updated frequently. Read each time you access this page.
 - b. **Request Service Instructions:** This section will be updated frequently. Read each time you access this page.



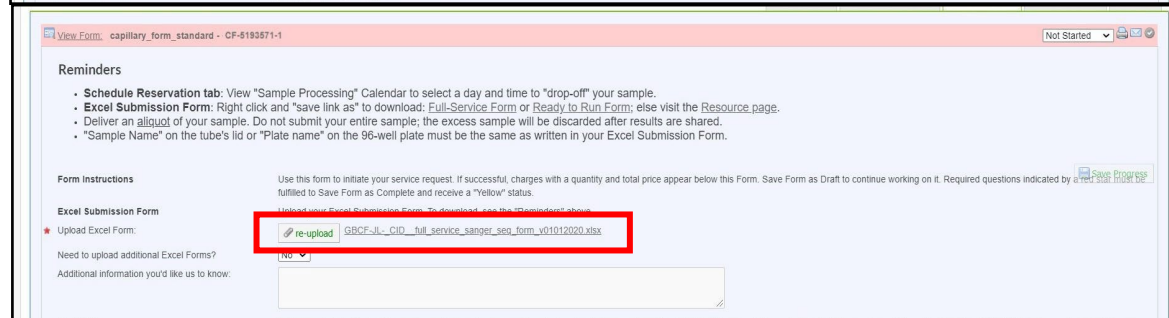
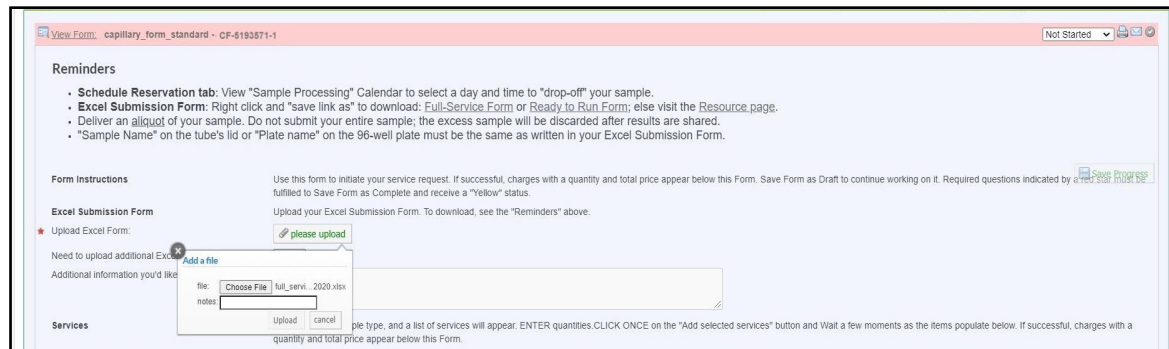
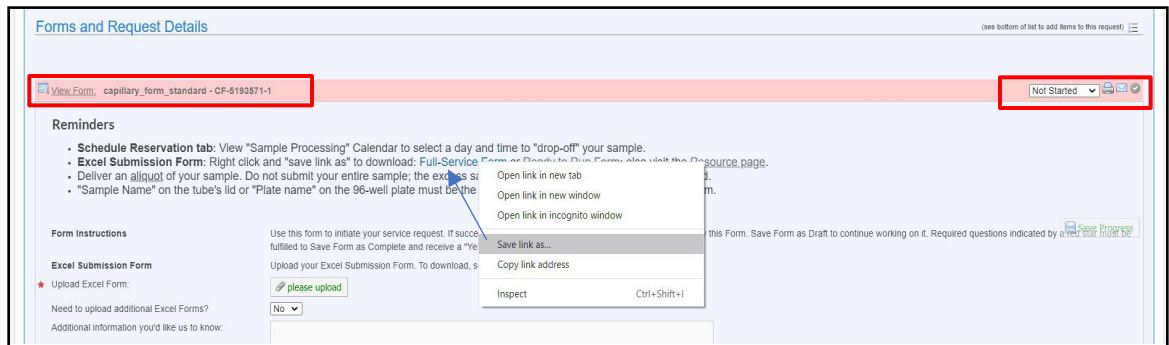
4. Scroll down to see the list of services provided. Services are assigned to a "(service category)". A description of the service is immediately below the Service Name. To begin, click "request service". If you are a member of multiple Labs/Groups, you will first be asked to select the Lab/Group this request will be made under.



5. After clicking “request service”, the Request Service interface, which contains several sections that need to be completed before submission to the core, will open up.
 - a. **Service Request Name**
 - b. **Basic Workflow:** Hover over each step for additional information.
 - c. **Service Request ID and Customer information:** Auto-generated identifier for your specific request. Customer information capture for your account during the one-time registration.
 - d. **Forms and Request Details:** This sections contains custom iLab forms that need to be completed as part of your request. *(Excel Submission Form is completed separately and attached here.)*

The screenshot displays the 'Sanger Sequencing & Fragment Analysis' request service interface. At the top, there are navigation links: 'About Our Core', 'Schedule Reservations', 'Request Services', 'View My Requests', and 'Contact Us'. The main heading is 'Sanger Sequencing & Fragment Analysis'. Below this, a 'Basic Workflow' section shows a sequence of steps: 'Initiation' (highlighted in green), 'Agreement', 'Approval', 'Execution', and 'Completion'. The 'Service Request ID' is shown as '[GBCF-JL-{CID}]'. Customer information includes 'Customer: Jacqueline Lopez Lab: Admin (ND) Lab', 'Email: jlopez11@nd.edu', and 'Phone: 574-631-1902'. The 'Forms and Request Details' section includes a 'View Form' button for 'capillary_form_standard - CF-6193871-1' with a 'Not Started' status. A 'Reminders' section lists instructions for scheduling reservations, downloading forms, and sample delivery. A 'Form Instructions' section explains how to use the form and save progress. An 'Excel Submission Form' section includes an 'Upload Excel Form' button and a dropdown menu for 'Need to upload additional Excel Forms?' set to 'No'.

6. Custom Form: Each service request will have a specific custom form, which is updated periodically.
 - a. **View Form and Status:** Collapse and expand the custom form. Status is “Not Started”.
 - b. **Excel Submission Form:** Right-click on the link to download a current version.
 - c. **Upload Completed Excel Submission Form:** Click on “please upload”. Choose the file. Click “upload” button. If successfully uploaded, the file will appear with “GBCF-” prefix.



- d. **Services Section:** Choose your sample type and a list of services will appear. Enter the quantity into the field to the left of the service name (e.g. Full Service Sanger Sequencing, per reaction). Click “Add selected services” button to add service charges to your request. If service charges are successfully added, a check mark appears with “Selected charges added (see below).”
 - i. **IMPORTANT:** Wait 5-seconds for charges to appear below after clicking “Add selected services” button. There is a brief delay before charges are added. Clicking the button again will add more service charges to your request.
 - ii. **Save draft of form:** Custom form status changes to “In progress” and form collapses.
 - iii. **Save completed form:** Custom form status changes to “Complete” and form collapses.

The image displays two screenshots of a web application interface for managing services. The top screenshot shows the 'Services' section with a list of services and a table of charges. A red box highlights the 'Add selected services' button, and a callout box points to it with the text: "Click 'Add selected services' once and wait 5 seconds for charges to appear." The bottom screenshot shows the same interface, but with a red box highlighting the 'save completed form' button. A callout box points to it with the text: "Click save completed form to save the form and mark it as completed. Click save draft of form to save the form, but mark it as in progress." Both screenshots show a table with columns for Date, Service Name, Quantity, Unit Price, Total, Billing Status, and Work Status.

Date	Service Name	Quantity	Unit Price	Total	Billing Status	Work Status
Jan 10 01:03 PM	Full-Service Sanger Sequencing, per reaction Sanger Sequencing & Fragment Analysis	24.0	\$5.50	\$132.00	Not Ready To Bill	Proposed

- e. Once you have (1) uploaded a completed Excel Submission Form and (2) added service charges, click “save completed form”. The custom form collapses, and the status changes to “complete” with a yellow header. Your projected cost is shown below in the left corner.
 - i. **Your request is not done yet. Payment information must be added.**

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

[View Form](#) capillary_form_standard - CP-5193571-1 Completed ▾ 📄 🗑️

Jan 10 06:59 PM	Full-Service Sanger Sequencing, per reaction Sanger Sequencing & Fragment Analysis	Quantity: 24.0	Unit Price: \$5.50	Total: \$132.00	Billing Status: Not Ready To Bill	Work Status: Proposed
-----------------	---	----------------	--------------------	-----------------	-----------------------------------	-----------------------

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

Cost

The core will review and update this projected cost. You will only be billed for completed work.

Total Projected Cost: \$

- f. **Payment Information Section:** Select a FOP from the pull-down.
 - i. Click “Split Cost” to charge a percentage of your projected cost to multiple FOPs.
 - ii. Click the dollar sign (\$) icon to charge a specific service to a different FOP.

Payment Information

Please enter the FOP (Activity Code) 📄

% **FOP (Activity Code)** 📄 Activity Code

100.0% %

100.0% Total Allocated 📄

[+ Split Charge](#)

enter additional payment information

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

Payment Information

Please enter the FOP (Activity Code) 📄

% **FOP (Activity Code)** 📄 Activity Code

100.0% %

100.0% Total Allocated 📄

[+ Split Charge](#)

enter additional payment information

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

[View Form](#) capillary_form_standard - CP-5193571-1 Completed ▾ 📄 🗑️

Jan 10 06:59 PM	Full-Service Sanger Sequencing, per reaction Sanger Sequencing & Fragment Analysis	Quantity: 24.0	Unit Price: \$5.50	Total: \$132.00	Billing Status: Not Ready To Bill	Work Status: Proposed
-----------------	---	----------------	--------------------	-----------------	-----------------------------------	-----------------------

Charge a specific service to a different FOP.

Cost

The core will review and update this projected cost. You will only be billed for completed work.

Total Projected Cost: \$

- g. Once you have (1) uploaded a completed Excel Submission Form, (2) added your service charges, (3) clicked “save completed form”, and (4) selected a FOP in the Payment section, you can
 - i. “Save draft request” to further review or edit, **OR**
 - ii. “Submit request to core”. You will be direct to the “View My Requests” tab.

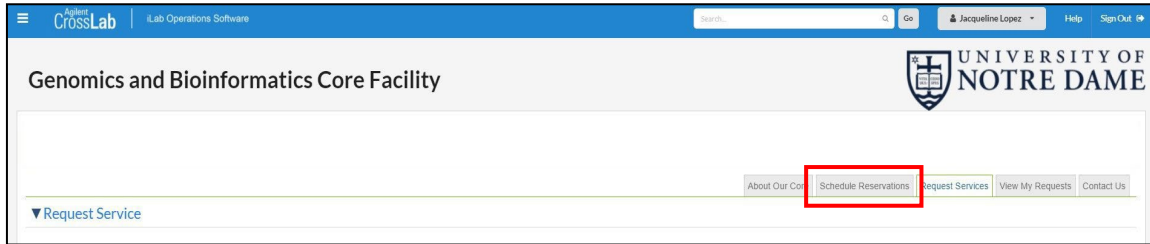
[submit request to core](#) [save draft request](#) [Cancel](#)

Your request will appear in **VIEW MY REQUESTS** tab as an “active request” with a status of “Waiting for core to agree”. The core will review it and “Agree” to your proposed request or “Disagree” to ask for more information.

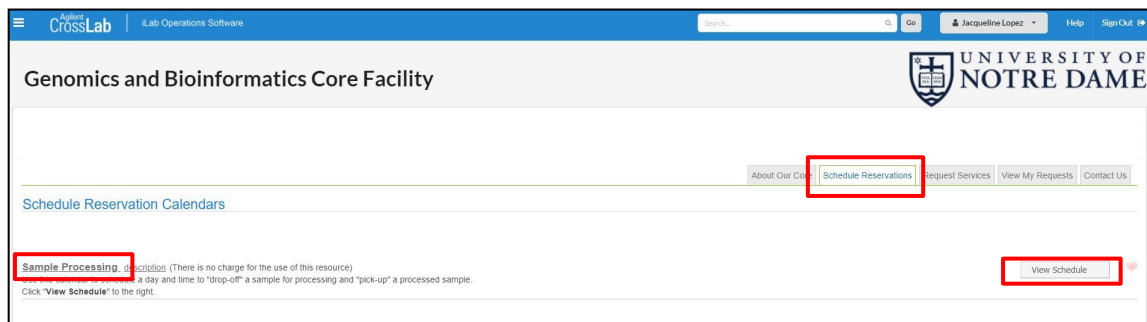
Schedule a Reservation in a Calendar (Researcher)

Once you have been accepted into a PI's lab and assigned a FOP, you can "Schedule a Reservation" in a calendar.

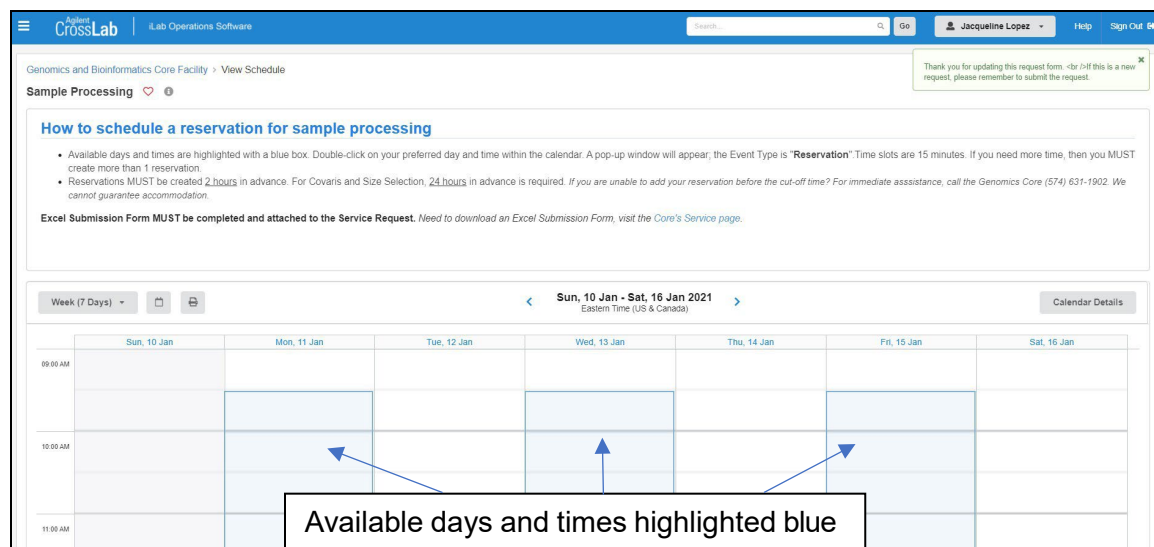
1. [Single Sign-On \(SSO\) into iLab.](#)
2. [Navigate to Genomics Core Facility in iLab.](#)
3. Once the page loads, you are directed to the Genomics and Bioinformatics Core Facility **Request Services** tab. To view our calendars, click **Schedule Reservations** tab.



4. The Schedule Reservations tab is where we maintain our list of calendars. Click on the calendar name (i.e. "Sample Processing" or "view calendar"). The schedule opens up.



5. To schedule an event on the calendar, double-click on the day and time. Available times are highlighted blue. If you are a member of multiple Labs/Groups, you will first be asked to select the Lab/Group this reservation will be made under. Then, complete the reservation details:



6. After double-clicking on the day and time, reservation interface, which contains several sections that need to be completed before saving your reservation, will open up. Scroll down to see all sections.
 - a. **Reservation details:** Information about the reservation, such as the specific resource, the lab and when it was created.
 - b. **Instructions:** This section is updated frequently. Please read each time.
 - c. **Specify the required resource:** There are multiple options (e.g. Drop-Off or Pick-Up) for this calendar. Multiple reservations per time slot is intended to meet the increase demand for sample processing by allowing multiple end-users schedule reservations within the same time frame. To select an available time spot, specify the required resource by selecting from the pull-down menu. You can also leave a note about the reservation, and indicate if it is visible to all users, or only the core staff by selecting from the drop-down menu.
 - d. **Collaborators:** Collaborators are iLab members who have the same permission as the owner. Collaborators can view and edit reservations.
 - e. **Required forms:** This sections contains a custom iLab form that needs to be completed as part of your reservation. *(Number of tubes or plates indicates what is placed in the designated container or refrigerator.)*

- f. **Times:** Verify that the times of the reservation are correct. If you want to make any changes, click on the pencil icon, update the information, and then click the green check mark icon.

- g. **Use and cost reservation:** There is no cost. Reservation are non-billable events.
- h. **Service Project:** If you have an ongoing project that is related to this reservation you may see this option to link a service project to the reservation. The service project does have to be under your name and in "Processing" status.
- i. **Invite additional people to this event by email:** If you would like to invite others, enter their email address to forward an invite to them.

- j. Once you have (1) specified the required resource, (2) verified the start and end date and time, and (3) completed required forms, you can click save reservation.

General | Comments | Contacts

Reservation details ⚠ **Unsaved reservation - click save reservation**

For: Drop-Off (Spot #1) - Sample Processing (no charge) - My Reservation
 Lab: Pflender, Michael (ND) Lab
 Created on: January 08, 2023 18:27

How to schedule a reservation

DISREGARD USAGE and COST SECTION BELOW. There is no charge for reservations.

- Specify the required resource by selecting from the pull-down menu.
 - Drop-Off (Spot #1)
 - Drop-Off (Spot #2)
 - Drop-Off (Spot #3)
 - Pick-Up (Spot #1)
- Verify scheduled day and time is correct.
- Complete the required form in the right-side panel.
- (Optional) Assign this event to a service project by selecting from the pull-down menu. Service request status must say "Processing".
- (Optional) Invite additional people to this event. Scroll down to the bottom of the window.

You will receive a confirmation email with your reservation day and time. iLab sends a notification of new events to us. DO NOT send a separate email to genomics@nd.edu.

Specify the required resource: Drop-Off (Spot #2)

Event Notes: note visible to anyone

Saving a reservation will calculate any charges that have been made to the reservation.

Collaborators

Add collaborators to this event

Daniel Erickson

Required forms

Complete the required fields marked by a red star to save this reservation.

Reservation details

Reminder: ⚠ **For sample processing to begin, the Core must review and agree with your "Service request" which is created from the "Request Service" tab in addition to this reservation. If another laboratory member is responsible for creating Service Requests, please follow up with them to ensure it is submitted with your Excel Form.**

* Phone Number (for contact, in case of problems)

Number of tubes

Number of plates

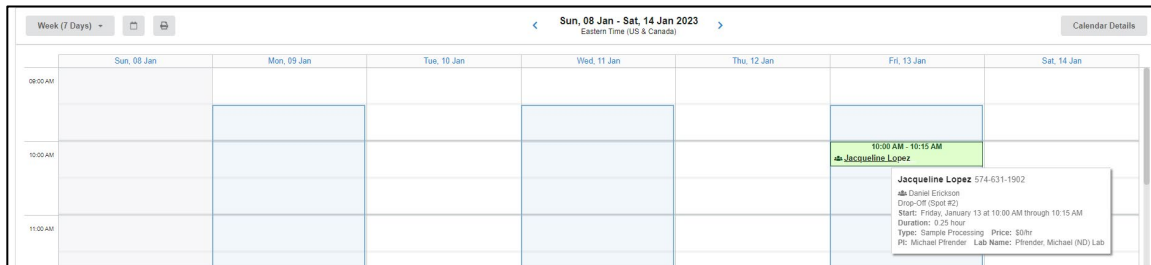
Additional information you'd like us to know:

* Service Category

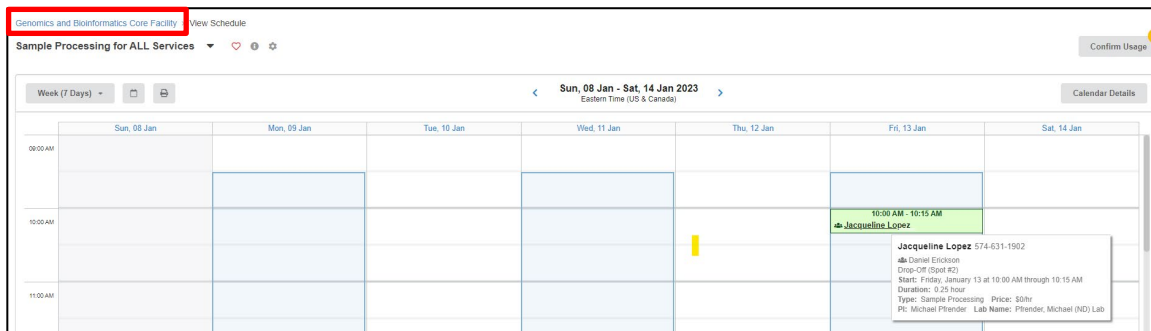
Samples are for:

NOTIFICATION ⚠ **NOTIFICATION: Holiday Celebration Announcements**

- k. The schedule appears with your reservation displayed.



- 7. To leave the calendar, click on "Genomics and Bioinformatics Core Facility" to return to the core



Multiple Reservations per Time Slot

Multiple reservations per time slot are intended to meet the increase demand for sample processing by allowing multiple end-users to schedule reservations within the same time frame. The iLab Schedule Reservations calendar gives service centers the ability to create a time slot with a specific number of spots or "resources".

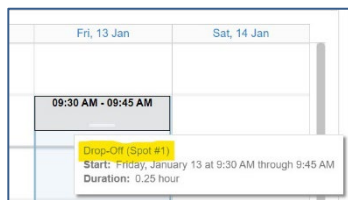
What is the difference between a time slot and time spot or "resource"?

The iLab Reservation calendar is divided into fixed segments of time within which a reservation can be scheduled. This segment of time is called a time slot.

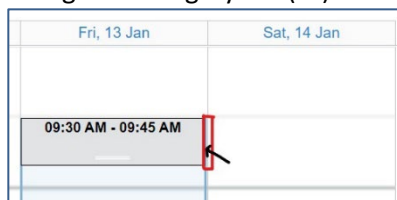
Within a given time slot, a specific number of time spots are available. The time spot is defined as a "resource". These resources are categorized as either "Drop-Off" and "Pick-Up" spots. A different end-user may select an available spot or "resource" for a reservation.

How to select a time spot within a time slot?

1. Navigate to the date and 15-minute time slot of interest.
 - a. If one or more gray boxes are displayed, then time spots are unavailable.
2. Before continuing, place your cursor over the gray box(es) to determine and take note of which time spots are unavailable.
 - a. In this example, "Drop-Off (Spot#1)" for time slot 9:30am to 9:45am on Friday, Jan 13 is unavailable.

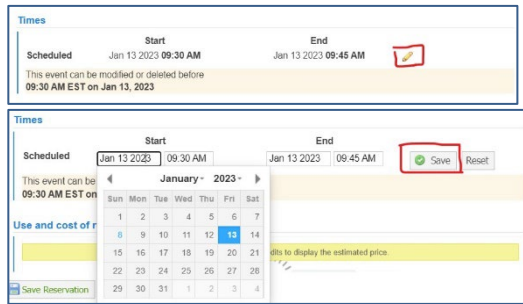


3. To reserve a time spot within the time slot 9:30am to 9:45am, place your cursor to the immediate right of the gray box(es) on the column divider (vertical line) and double-click.



4. The sample processing reservation form opens in a pop-up window.
5. To select an available time spot, specify the required resource by selecting from the pull-down menu.
 - a. In this example, "Drop-Off (Spot #2)", "Drop-Off (Spot #3)" and "Pick-up (Spot#1)" are available. Please note that the iLab systems does NOT filter unavailable time spots or resource. For this example, "Drop-Off (Spot #2)" is selected.

6. Verify the scheduled date and time are correct.
 - a. To edit the date or time, click on the "pencil".
 - b. Click in the date or time fields to modify.
 - c. Click "Save" when done.

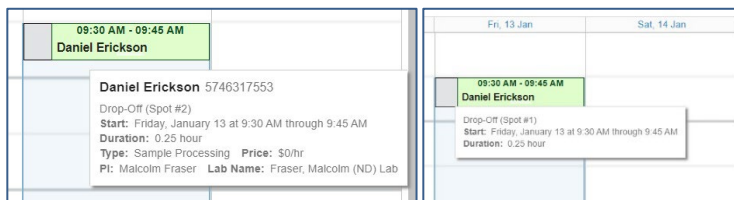


7. Complete the required form in the right side panel.
 - a. Enter a phone number
 - b. Number of tubes or plates
 - c. Additional information
 - d. Select a service category
 - e. Select for which service the samples are for

8. Save Reservation by clicking the "Save Reservation".



If successful, the calendar view will now display multiple reservations within a single time slot. Your reservation will display the full details while the reservation of a different user shows limited information.



Repeat the same process to reserve another resource for a different service. For the example above, "Drop-Off (Spot #2)" was selected for Standard Service / Ready to Run Fragment analysis. Select another time spot within the same time slot to drop off samples for a different service, such as Sample QC, or "Pick-Up (Spot #1) to reserve a sample pick-up from our service center.

View My Service Requests (Researcher)

The “View My Service Requests” tab is where users can review service requests they have submitted to the core. The service requests are chronologically ordered with the most recent at the top by default. User may sort by table headers or apply various filters including ‘status’ to return a specific list.

1. The filters panel refines your view of listed requests.
2. Request panel displays all or filtered service requests.
3. Custom filter tab is created by selecting filters and clicking “Create tab from filters” button.
4. Status filter allows you to filter by workflow status (i.e. draft, active, processing, and completed).
5. Reload Active Requests: Update the list of service requests (without having to refresh your browser)

The screenshot shows the 'View My Service Requests' interface. At the top, there are navigation tabs: 'About Our Core', 'Schedule Equipment', 'Request Services', 'View My Requests', and 'Contact Us'. Below these, there are buttons for 'Fund 12345' and 'active requests'. A 'Reload Active Requests' button is highlighted with a red circle and the number 5. The main content area shows a table of service requests with columns for date, for, service id, status, and cost. A filter panel on the left is highlighted with a red circle and the number 1. The table contains 7 results, with the first row being 'Waiting for Core to Agree' and the last row being 'Completed'. A 'Submit' button is visible below the 'Waiting to Submit to Core' rows.

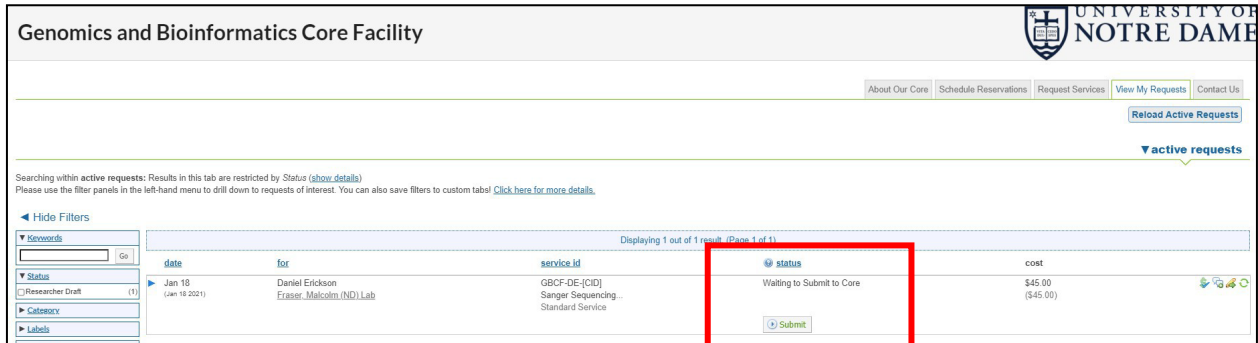
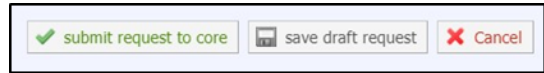
date	for	service id	status	cost
Feb 28 (Feb-28 2018)	Sample Member 1 Sample Lab	FCF-SM1-11 Proteomics	Waiting for Core to Agree	\$100.00 (\$100.00)
Feb 28 (Feb-28 2018)	Sample Member 1 Sample Lab	FCF-SM1-[CID] Proteomics	Waiting to Submit to Core	\$20.00 (\$20.00)
Feb 24 (Feb-24 2018)	Sample Member 1 Sample Lab	FCF-SM1-9	Waiting for Financial Approval	\$0.00 (\$0.00)
Feb 24 (Feb-24 2018)	Sample Member 1 Sample Lab	FCF-SM1-[CID]	Waiting to Submit to Core	\$0.00 (\$0.00)
Feb 24 (Feb-24 2018)	Sample Member 1 Sample Lab	FCF-SM1-[CID]	Waiting to Submit to Core	\$0.00 (\$0.00)
Feb 24 (Feb-24 2018)	Sample Member 1 Sample Lab	FCF-SM1-8	Completed	\$540.00 (\$1,290.00)
Feb 24 (Feb-24 2018)	Sample Member 1 Sample Lab	FCF-SM1-[CID]	Waiting to Submit to Core	\$0.00 (\$0.00)

Workflow Overview: Service Requests (Researcher)

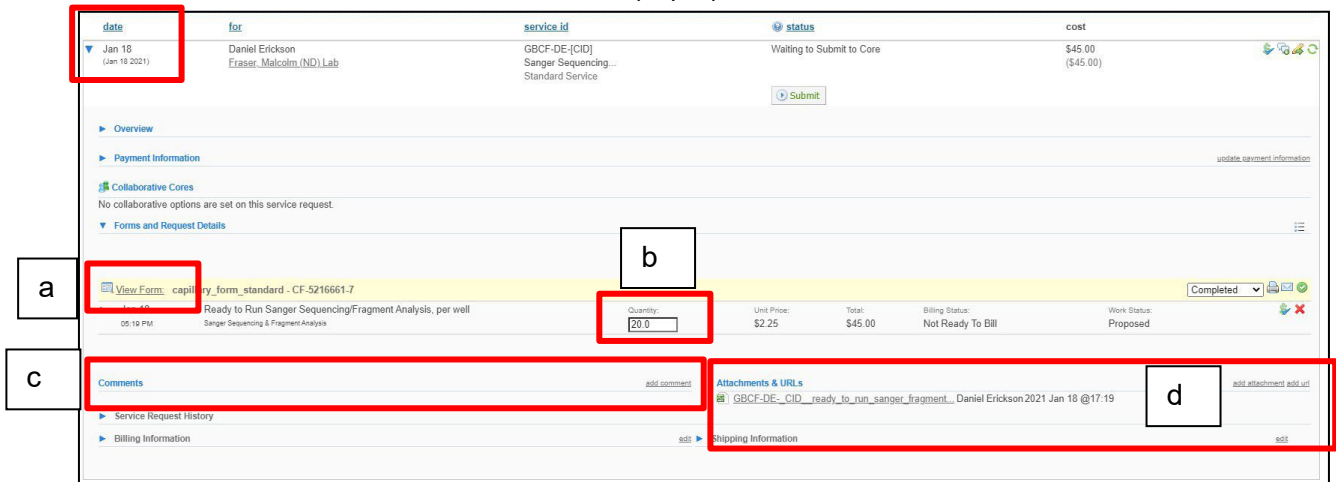
PERSON	ACTION BUTTON	NEW STATUS
User	Save draft request	Waiting to submit to Core
User	Submit to Core	Waiting for Core to Agree
Core	Agree	Waiting for Core to Begin
Core	Begin	Processing
Core	Completed	Completed

Managing Service Request (Researcher)

1. Once you have (1) uploaded a completed Excel Submission Form, (2) added your service charges, (3) clicked “save completed form”, and (4) selected a FOP in the Payment section, you can
 - a. “save draft request” to further review or edit, OR
 - b. “submit request to core”.
2. After clicking either button, you are redirected to the “View My Requests” tab.
3. If you clicked “**Save draft request**”, your status is “Waiting to submit to Core”. The Core has no record of your request at this point. When you are ready to share your request with the Core, click “submit”.



4. To view and edit the details of your **Saved Draft Request**, click the blue arrow next to the date to expand the request details.
 - a. Click “View Form” to upload a new file or add new charges.
 - b. Click Quantity box to enter a new value.
 - c. Comments tools allow you to communicate directly with the Core about this request.
 - d. Attachments and URLs section displays uploaded documents and URL links.



1. If you clicked **“Submit to Core”**, your status is **“Waiting for Core to Agree”**. The Core has control of your request. Your request is assigned a Service ID.

GBCF-DE-46 Your request has been submitted to the service center for review. You have agreed to a projected cost of \$45.00 for this service. If this cost increases, you may be asked to agree to the new projected cost, in which case you will receive an additional email.					
date	for	service id	status	cost	
Jan 18 (Jan 18 2021)	Daniel Erickson Fraser_Malcolm (ND) Lab	GBCF-DE-46 Sanger Sequencing... Standard Service	Waiting for Core to Agree	\$45.00 (\$45.00)	

2. **Only the Core can change or edit the charges within your request at this point.**
3. You may add attachments and URLs to your **“submitted”** request.

GBCF-DE-46
Your request has been submitted to the service center for review. You have agreed to a projected cost of \$45.00 for this service. If this cost increases, you may be asked to agree to the new projected cost, in which case you will receive an additional email.

date	for	service id	status	cost	
Jan 18 (Jan 18 2021)	Daniel Erickson Fraser_Malcolm (ND) Lab	GBCF-DE-46 Sanger Sequencing... Standard Service	Waiting for Core to Agree	\$45.00 (\$45.00)	

Overview

Payment Information update payment information

Collaborative Cores
No collaborative options are set on this service request.

Forms and Request Details

View Form: capillary_form_standard - CF-5216661-7

date	for	quantity	unit price	total	billing status	work status
Jan 18 08:19 PM	Ready to Run Sanger Sequencing/Fragment Analysis, per well Sanger Sequencing & Fragment Analysis	20.0	\$2.25	\$45.00	Not Ready To Bill	Proposed

Comments add comment Attachments & URLs add attachment add url

Service Request History edit Shipping Information edit

4. **“Waiting for Core to Begin”**: Core has agreed to your request, but work has not started.
5. **“Processing”**: The Core has begun working on your request.
6. **“Completed”**: The Core has processed your request. An automated email is sent notifying you that your request is complete. This is the signal to retrieve your data or results.

Displaying 1 out of 1 result. (Page 1 of 1)

date	for	service id	status	cost	
Jan 18 (Jan 18 2021)	Daniel Erickson Fraser_Malcolm (ND) Lab	GBCF-DE-46 Sanger Sequencing... Standard Service	Completed	\$45.00 (\$45.00)	

completed: Jan 18

- a. Sanger and Fragment Analysis:
Google Drive (unchanged)
- b. Sample QC: iLab Service Request
Attachments and URL section.

Attachments & URLs
data url: [Results](#)

Drive
PI_Lab_Data_GBCF

Additional help with “View My Requests”

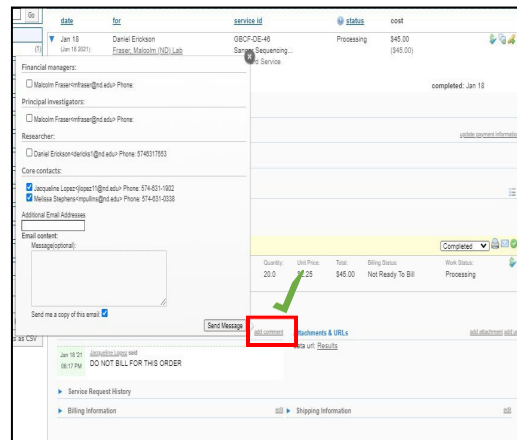
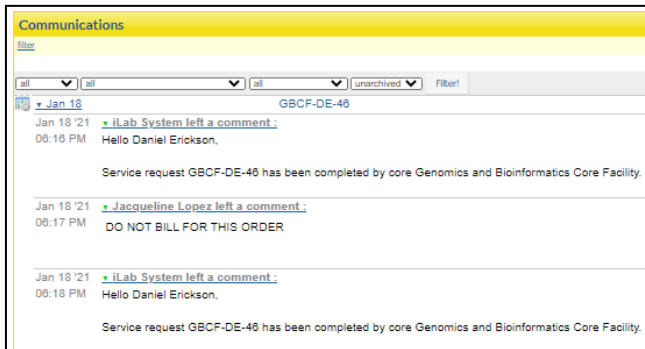
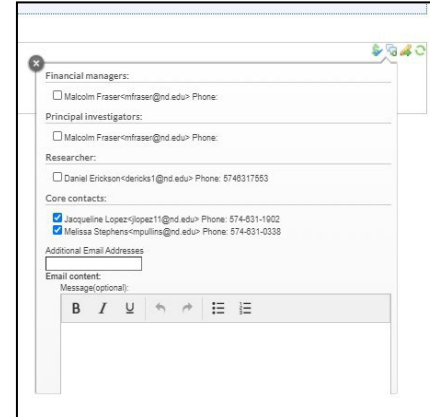
General instructions for **“View My Requests”** can be found on the Agilent Technologies [iLab Help Site](#).

Communicate using ‘comments’ tool (Researcher)

Adding comments to your service request is the best way for the User and Core staff to communicate back and forth. Unlike message sent through ND or personal email accounts, messages are labeled with the Service ID and neatly organized within the comments section of the request and the communication section of the Home panel.

To avoid messages getting “buried” in email or miscommunication regarding a project, Users and the Core staff will add comments to the discuss service requests.

1. Click on the “comment” icon, and the comment window appears. If the comment window is “cut-off” as shown to the right, click the “X” to close the window.
2. Instead, click the blue arrow to access the ‘comments’ section within the service request. Click “add comments” and the comment window will appear intact this time.
3. Select the Core staff you’d like to contact and other in the “additional email” field.
4. View all comments from the “Communication” section of the Home panel.



Additional help with “Adding Comments”

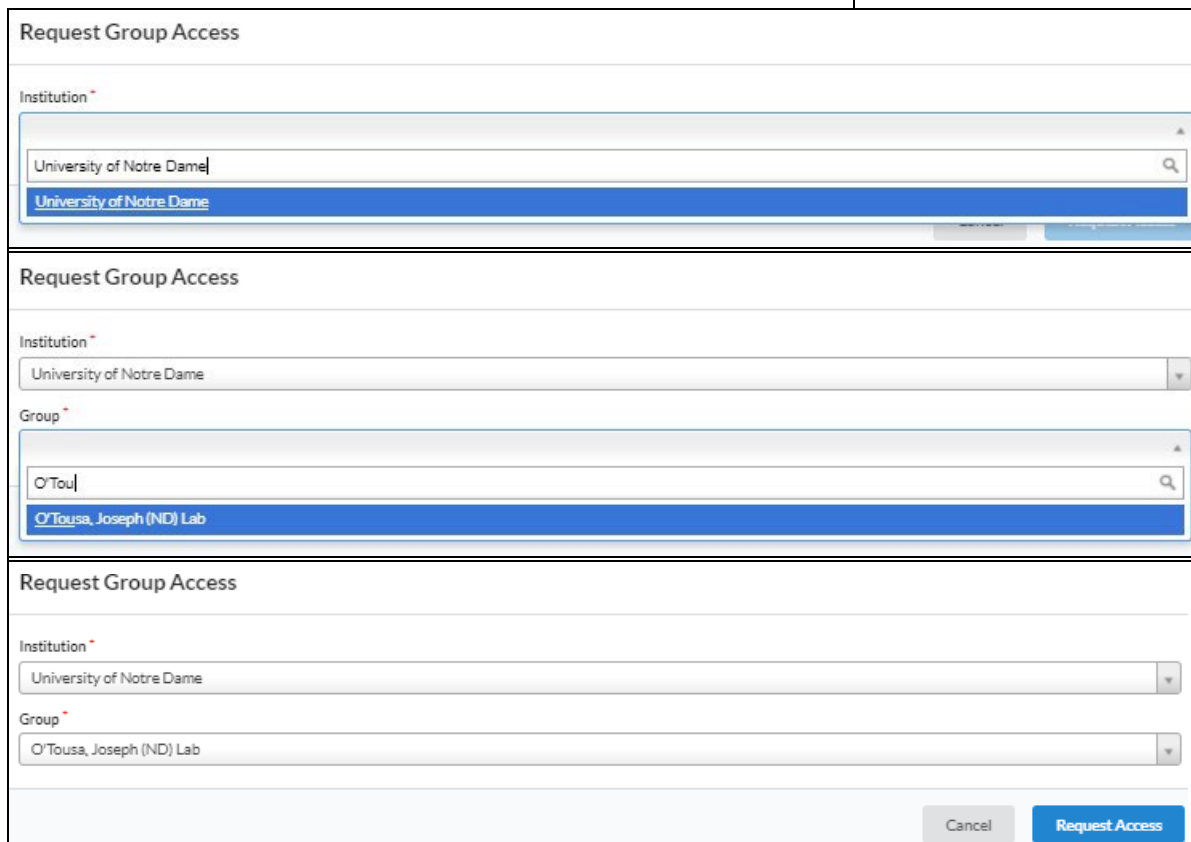
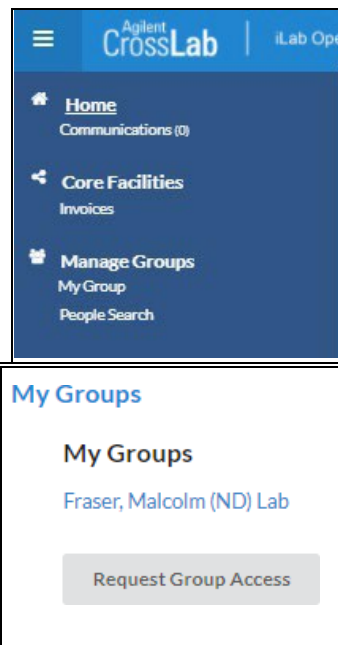
General instructions for “[Adding Comments](#)” can be found on the Agilent Technologies [iLab Help Site](#).

Request Group Membership (Researcher)

A user can request to join another group to gain access to a PI’s FOPs for billing service request charges.

1. Open the left side panel, and click on “My Groups”.
2. After the page reloads, your Group Memberships are displayed in the main window.
3. Click on “Request Group Access”.
4. In the field “Institution,” type “University of Notre Dame”. Click on the filtered search result [University of Notre Dame](#).
5. In the field “Group”, type the PI’s LAST NAME. Click on the filtered search result [PI Last Name \(ND\) Lab](#).
6. Click “Request Access” button.

A notification is sent the PI, who will accept your membership request and assign FOPs to your profile.



[Additional help with “Group Membership”](#)

General instructions for “[Group Membership](#)” can be found on the Agilent Technologies [iLab Help Site](#).

Primary Investigator: How to Get Started

For researchers to begin submitting requests and scheduling reservations through iLab, you will need to register, create an account, and approve “my group” memberships. All facility users are invited to use the system, which requires a one-time registration as discussed below.

Laboratory members must be added to your group and assigned a FOP to use iLab. You may add researchers to your group in advance. Else, you will receive email requests from iLab when a researcher wishes to join your group. The request email will have specific instructions on how to approve the request. As a reference, instructions for the process are below. *If you would prefer to delegate these notifications/approvals to a financial manager, please email ndcores@nd.edu with your financial manager’s name & email and state that you give permission to delegate notifications and approvals.*

Once you are registered, the system will enable you to:

- Select and approve “my group” membership(s)
- Place service requests
- Schedule reservations for sample delivery
- Provide required approvals
- Monitor progress of requests

iLab accounts are intended for University of Notre Dame researchers, including:

- Primary Investigators
- Research professionals and staff
- Professional Students

iLab start-up workflow has two alternative models:

Track 1	Track 2
Primary investigator <ul style="list-style-type: none"> • creates account for the first time; • selects and approves “my group” membership(s) of researchers; • assigns FOP to researcher(s). 	Researcher <ul style="list-style-type: none"> • creates a new account for the first time; • waits for approval.
Researcher <ul style="list-style-type: none"> • receives notification of approval; • creates a new account for the first time; • submits service request; • schedules reservation to delivery sample. 	Primary investigator <ul style="list-style-type: none"> • receives notification of request to join “my group”; • creates account for the first time; • approves membership; • assigns FOP to researcher.
	Researcher <ul style="list-style-type: none"> • receives notification of approval; • creates service request; • schedules reservation to delivery sample.

Register for an iLab account (Primary Investigator)

1. Navigate to [InsideND](#) and search for “iLab”. Launch the application.
2. In the upper-right-hand corner of the screen click ‘Sign In,’ and select to sign in using University of Notre Dame credentials.
3. You will be directed to an authentication page where you will enter your University of Notre Dame netID and password.
4. Once you have entered your credentials, click the ‘Login’ button.

Set Auto-Approval Amount (Primary Investigator)

5. Once logged in, look for the link in the left hand menu that says 'my groups'. Hover-over and select your lab.
6. Set the auto-approval amount. This means all service requests BELOW the designated amount will process without your approval. If you do not wish to approve service requests below a certain dollar amount, select the 'Members' panel and enter a dollar amount in the 'Auto Pre-Approval amount' field and click 'save settings.' **Unless a dollar amount is set, all requests will require your (or your financial delegate's) approval before the Core facility will approve and fulfill the service request.**

Add Researcher to “my group” and assign FOP (Primary Investigator)

7. To approve lab membership requests, select the ‘Membership Requests & FOP’ tab. New membership requests will show at the top of this page. Click “Approve” to accept a member into your lab. Click “Reject” if they are not a member of your lab.
8. To assign an FOP to a member of your lab, find the member in the above list where it says, ‘Manage FOP.’ Select the checkbox(es) to the right of their name for the FOP(s) you wish to assign them.

Assign Financial Delegate / Financial Approver (Primary Investigator)

9. Select the “Members” tab. Navigate to “Lab members and settings”.
10. Click on the “paper & pencil” icon to edit member’s settings.
11. In Association Information section, adjust permission to “Manager” and “select Core Financial Contact?”
12. Click “Save”. A dollar “\$” icon will appear, which indicates the new Financial Approver role.

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

Additional help

General instructions can be found on the Agilent Technologies [iLab Help Site](#).

- [Membership Requests and Fund Numbers](#)
- [Members](#)
- [Member Settings](#)

For all Notre Dame Registration and financial questions, contact ndcores@nd.edu.

Support

Contacts

For questions specific to the Genomics and Bioinformatics Core Facility, use the iLab Contact Us tab or email genomics@nd.edu.

For all iLab registration and financial questions, contact ndcores@nd.edu.

If you experience a problem with the iLab system, please contact ndcores@nd.edu. Provide screenshots to help them provide better feedback and support.

For iLab environment support and technical difficulties, we recommend the **'HELP'** link in the upper right hand corner of the screen. The iLab support help site articles address a wide range of topics.

iLab Help Site and Webinar Information

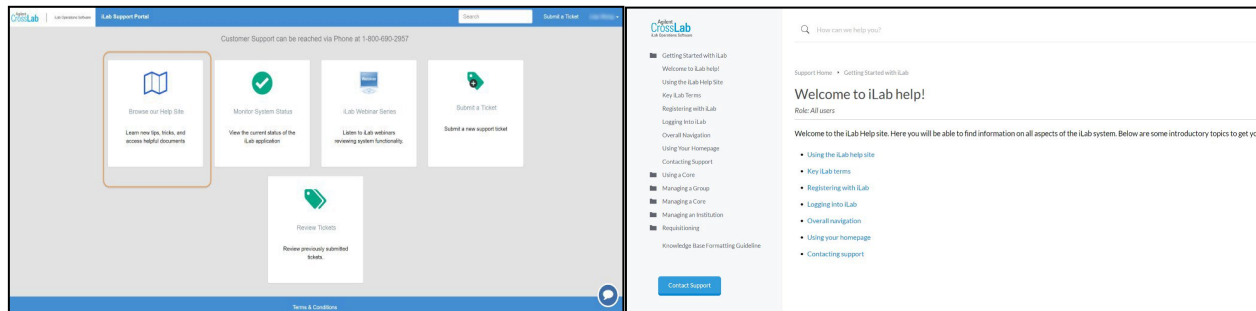
The [iLab Help Site](#) is dedicated to supplying documentation for different actions, roles, and elements in the system. The help site is continuously updated so check back frequently for new articles and updates.

Bookmark the page in your browser for easy access.

<https://help.ilab.agilent.com/35322-getting-started/299372-welcome-to-ilab-help>

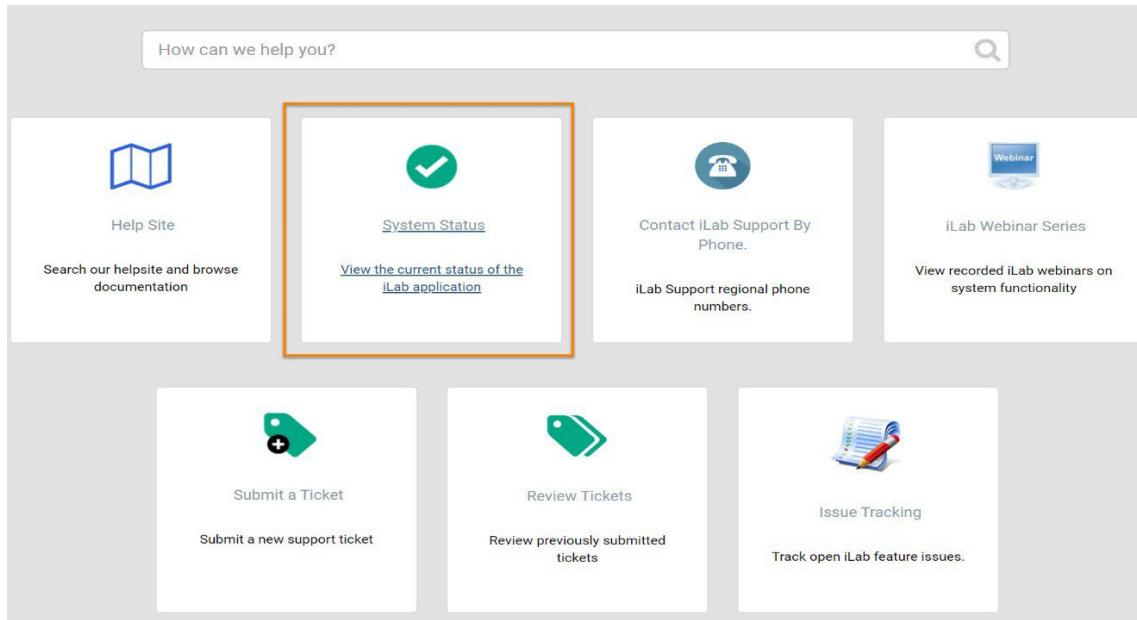
The iLab help site can be located by selecting the *HELP* link in the upper right-hand corner of the screen. Then select *Access to iLab's help site on the left-hand side*.

Webinars- Please visit the help site [webinars](#) page to view our webinars!



[iLab Status Page](#)

Also embedded within the iLab help site is a system status page that can be used to determine system outages, and when major functionality bugs are reported. iLab will also use the system status to post notifications for planned downtime. <http://status.ilabsolutions.com/>



[Key iLab Terms](#)

Key iLab Terms

Role: All users

Below is a glossary of key terms used in iLab, organized by topic:

- [Entities](#)
- [User Roles in iLab](#)
- [Other Terms](#)