



Idea Elan



uOttawa

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2021

INFINITY Software Lab Admin Guide

Comprehensive Online Solution for Lab
and Core Facility Management

PI/Lab Admin guide - uOttawa

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Quick Startup Guide for PI's/ Lab Admin

Login Instructions

URL: <https://secure17.ideaelan.com/uOttawa/Public/>

Go to the following URL and follow the way you would like to <authenticate>.



Options de connexion / Sign-in Options



uOttawa

Connectez-vous avec votre compte @uottawa.ca.

Sign in with your @uottawa.ca email account.



Autres / Others

Connectez-vous avec le compte de votre organisation.

Sign in with your organization email account.

The PI/Lab Admin:

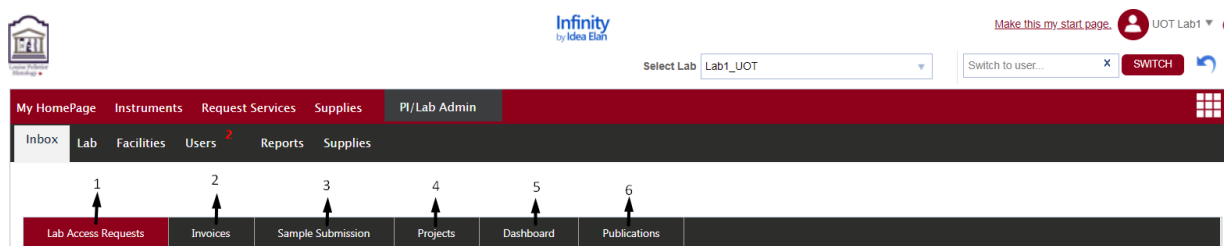
- Once logged in as a PI/Lab Admin, a toolbar with tabs will appear that are specific to your role.

Lab Admin Functions:



- Lab Admin:** To access all the lab admin features
- Inbox:** To view, accept and reject requests.
- Lab:** To add lab information, billing details such as account codes or purpose codes, and to access lab settings.
- Facilities:** To view and request access to various facilities listed.
- Users:** To add a user or to import/export users in bulk.
- Reports:** To generate and view usage/ expense reports for users and labs.
- Supplies:** To create supply orders.
- Select Lab:** Choose the lab you want to access from the drop-down list.

Inbox Functions:

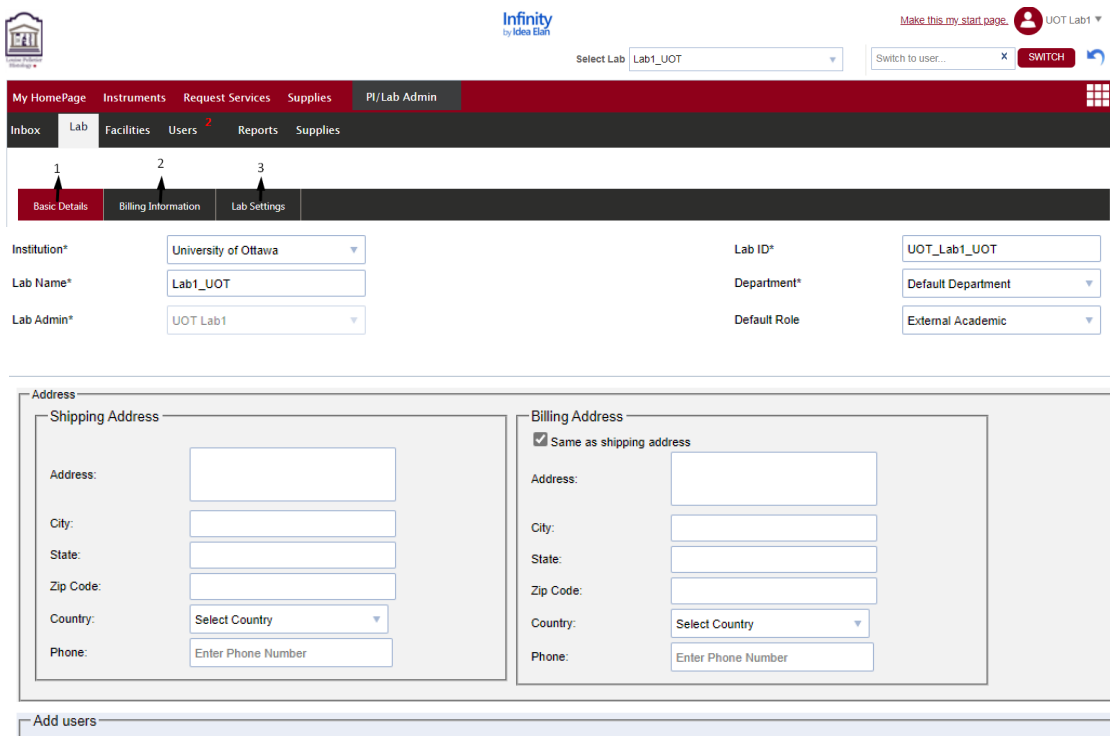


- Lab Access Requests:** To view, accept and reject user requests to the lab.
- Invoices:** To view, edit and accept invoices.
- Sample Submission:** To view sample submissions for the lab.
- Projects:** To view projects for the lab.
- Dashboard:** Displays the number of samples submitted, and the number of instrument reservations made.
- Publications:** PI's/ Lab Admin should confirm that users have used a particular facility before the core can present their publications. Under Inbox → Publications, PI's can view a list of user publications that facility admin have requested to claim under their core. The PI has the option to select "Yes" or "No."

Lab Details:

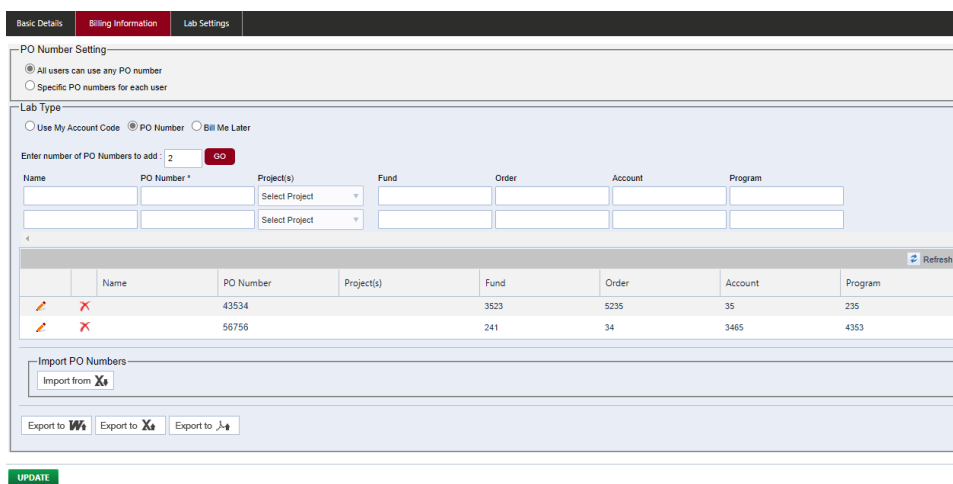
1. Basic Details:

- Select to fill out lab information









2. Billing Information:

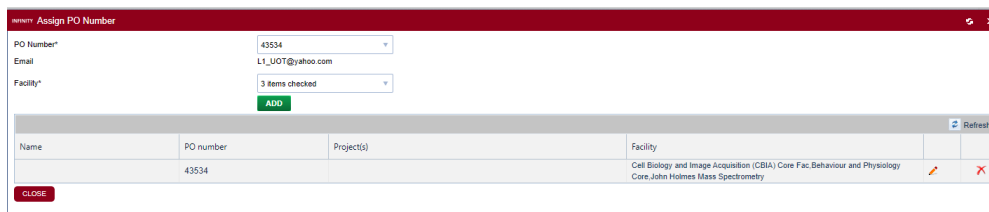
- Lab admin can select between the lab types such as “Use My Account code,” “PO Number,” or “Bill Me Later.”



- Choose between 2 options
 - All users can use any account
 - Specific account code for each user
- If you choose to assign account codes to your users, select that option and click 'update' at the bottom of the screen.
- Go to the User tab and click on the pencil next to the user's name

	L1_UOT@yahoo.com	UOT Lab1		
	L1_UOT@yahoo.com	UOT User1		

- The 'Assign account code' window will pop up and you can choose the account code and for which facility it should be used. Multiple accounts can be chosen.



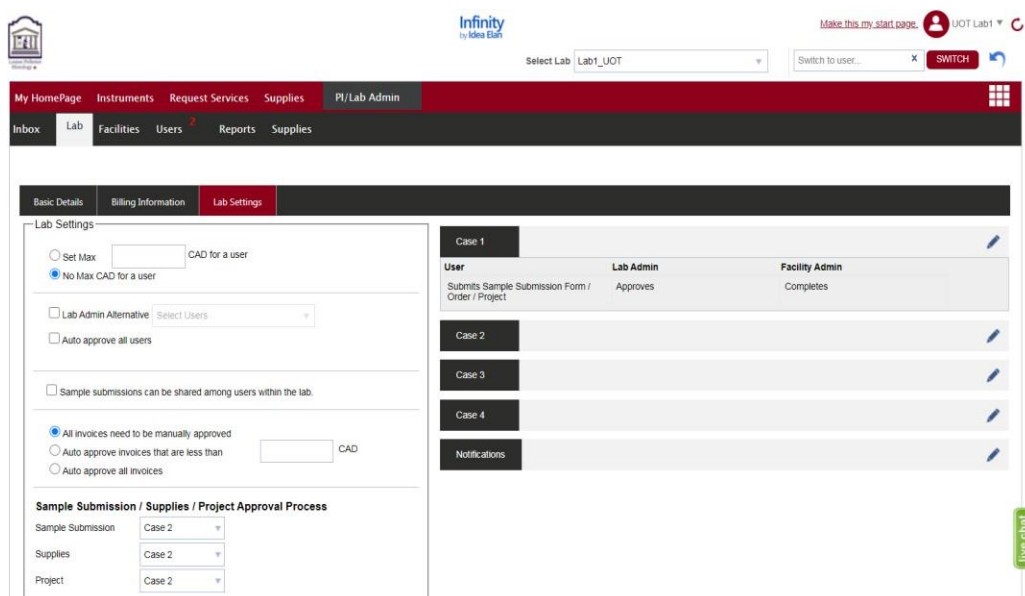
The 'Assign PO Number' window is shown. It has a red header bar. Below the header, there are three dropdown menus: 'PO Number*' (set to 43534), 'Email' (set to L1_UOT@yahoo.com), and 'Facility*' (set to 3 items checked). Below these is a green 'ADD' button. At the bottom, there is a table with columns: Name, PO number, Project(s), and Facility. The table contains one row with PO number 43534 and a facility name. There are 'CLOSE' and 'Refresh' buttons.

- Click on 'Add' to assign the account code.
- You will have to go through the same steps for every user in the lab.

3. Lab Settings:

Other lab details can be set under the Lab Settings section, such as: maximum amount a user can use from a grant; invoice approval settings modified to allow an invoice to be approved manually or automatically; and a lab alternative.

- **Case 1:** User submits a sample, the lab admin approves, and the facility admin completes it.
- **Case 2:** User submits a form that is auto approved and the facility admin completes it.
- **Case 3:** User submits a sample. The facility admin creates a quote, and the lab admin will reject or accept depending on the amount of the quote. Once approved, the facility admin. Completes it.
- **Case 4:** The user submits a sample, and based on whether the user is an External User or an Internal User, any of the above cases can be set and applied.



Lab Settings

☐ Set Max CAD for a user

☒ No Max CAD for a user

☐ Lab Admin Alternative Select Users

☐ Auto approve all users

☐ Sample submissions can be shared among users within the lab.

☒ All invoices need to be manually approved

☐ Auto approve invoices that are less than CAD

☐ Auto approve all invoices

Sample Submission / Supplies / Project Approval Process

Sample Submission Case 2

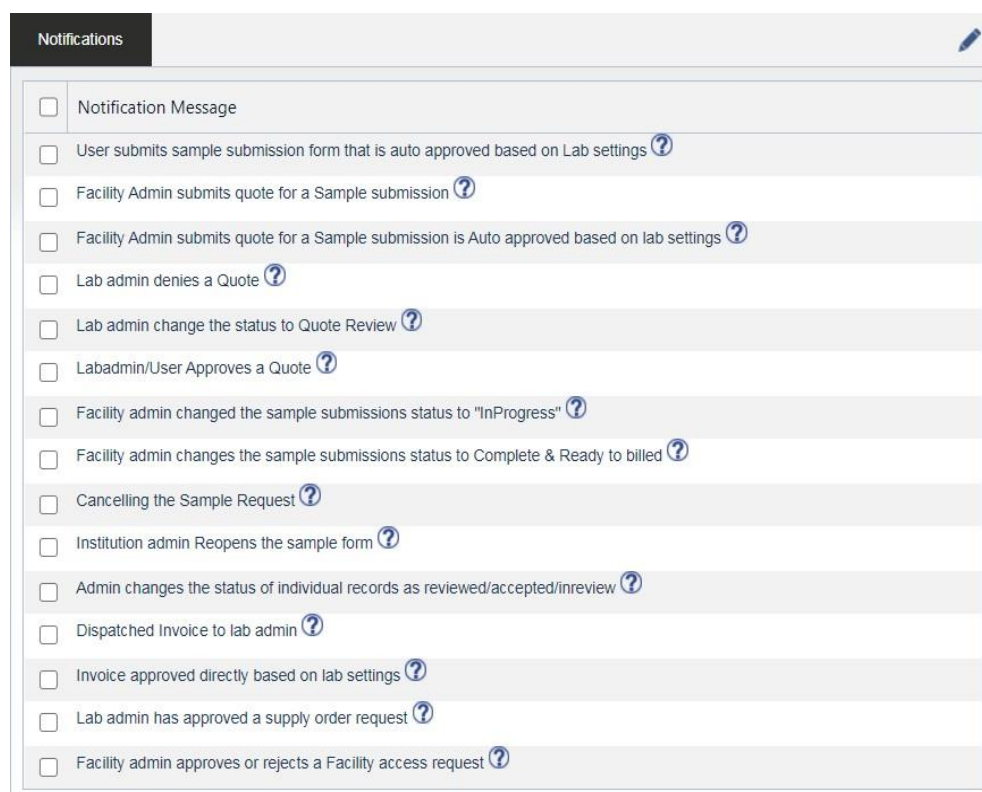
Supplies Case 2

Project Case 2

Case	User	Lab Admin	Facility Admin
Case 1	Submits Sample Submission Form / Order / Project	Approves	Completes
Case 2			
Case 3			
Case 4			
Notifications			

4. Notifications

Set up notification settings

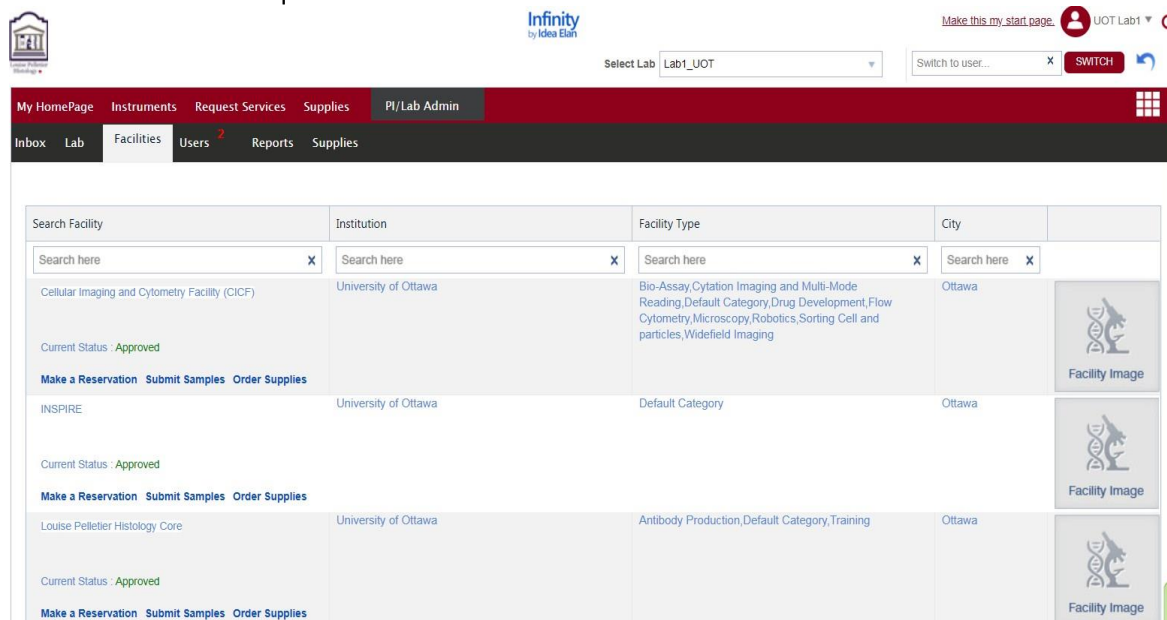





Notifications

- ☐ Notification Message
- ☐ User submits sample submission form that is auto approved based on Lab settings ?
- ☐ Facility Admin submits quote for a Sample submission ?
- ☐ Facility Admin submits quote for a Sample submission is Auto approved based on lab settings ?
- ☐ Lab admin denies a Quote ?
- ☐ Lab admin change the status to Quote Review ?
- ☐ Labadmin/User Approves a Quote ?
- ☐ Facility admin changed the sample submissions status to "InProgress" ?
- ☐ Facility admin changes the sample submissions status to Complete & Ready to billed ?
- ☐ Cancelling the Sample Request ?
- ☐ Institution admin Reopens the sample form ?
- ☐ Admin changes the status of individual records as reviewed/accepted/inreview ?
- ☐ Dispatched Invoice to lab admin ?
- ☐ Invoice approved directly based on lab settings ?
- ☐ Lab admin has approved a supply order request ?
- ☐ Facility admin approves or rejects a Facility access request ?

Facilities:

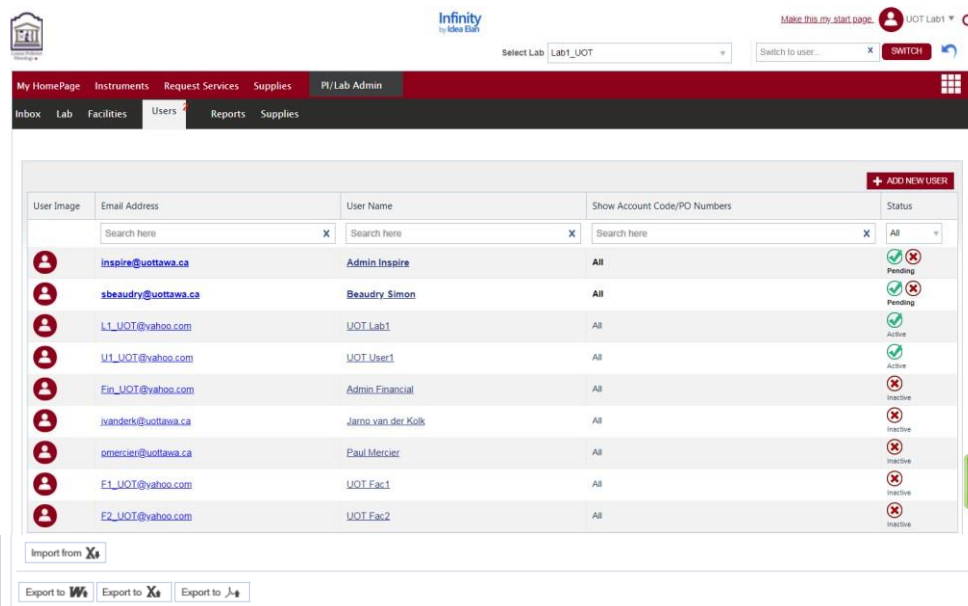
- To view and request access to various facilities listed.





















Search Facility	Institution	Facility Type	City
Search here	Search here	Search here	Search here
Cellular Imaging and Cytometry Facility (CICF)	University of Ottawa	Bio-Assay,Cytation Imaging and Multi-Mode Reading,Default Category,Drug Development,Flow Cytometry,Microscopy,Robotics,Sorting Cell and particles,Widefield Imaging	Ottawa
Current Status : Approved			
Make a Reservation Submit Samples Order Supplies			
INSPIRE	University of Ottawa	Default Category	Ottawa
Current Status : Approved			
Make a Reservation Submit Samples Order Supplies			
Louise Pelletier Histology Core	University of Ottawa	Antibody Production,Default Category,Training	Ottawa
Current Status : Approved			
Make a Reservation Submit Samples Order Supplies			

User:

All users affiliated with the lab are listed under the users tab. New users can be added one at a time by clicking on the “Add New User” tab on the top right side, or in bulk by clicking on “Import from excel”, to import a detailed excel sheet. PIs can also remove user access to the lab by clicking the green check mark under the “Status” column.

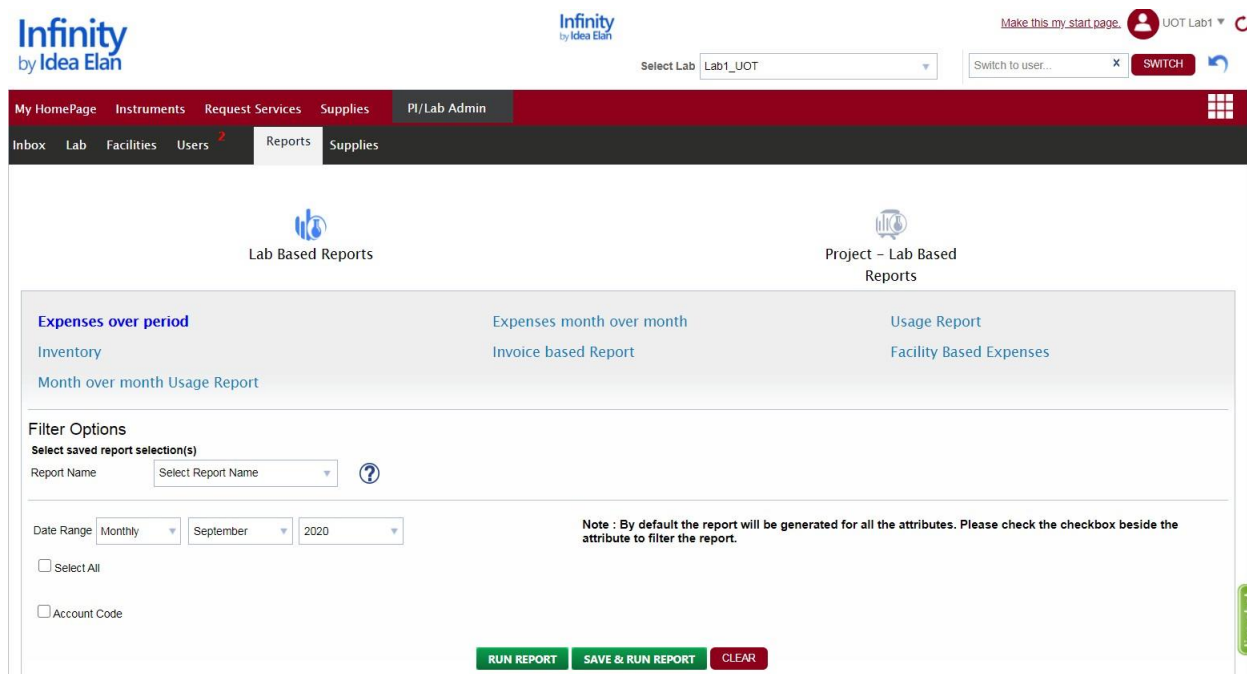


User Image	Email Address	User Name	Show Account Code/PO Numbers	Status
	inspire@uottawa.ca	Admin Inspire	All	
	sbeaudry@uottawa.ca	Beaudry Simon	All	
	l1_uot@yahoo.com	UOT Lab1	All	
	u1_uot@yahoo.com	UOT User1	All	
	fin_uot@yahoo.com	Admin Financial	All	
	jvanderk@uottawa.ca	Jarno van der Kolk	All	
	pmercier@uottawa.ca	Paul Mercier	All	
	f1_uot@yahoo.com	UOT Fac1	All	
	f2_uot@yahoo.com	UOT Fac2	All	

- The list of users can also be exported as word, excel or PDF document.

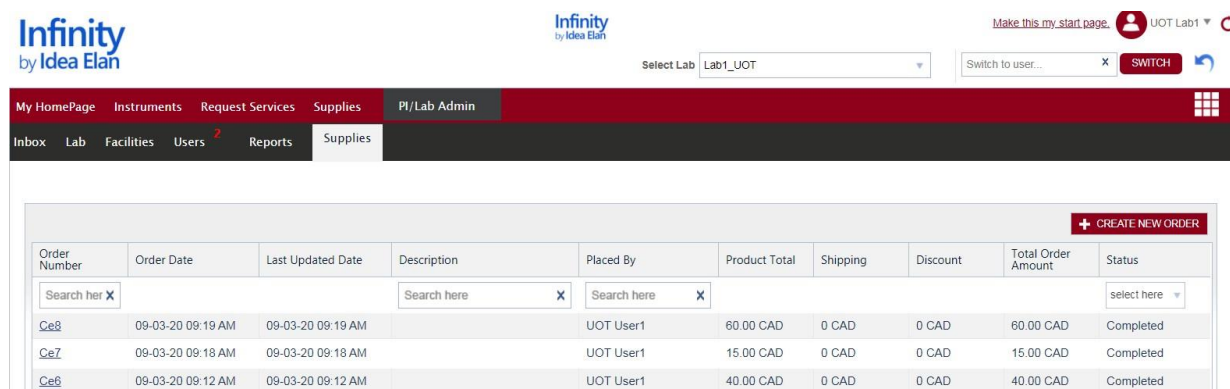
Reports:

Various reports can be generated for the lab, such as lab based/project-based reports. For example: Expenses over period, Invoice based reports or Usage reports. Select the report type, choose the required month, and click on run report. Options to save the report are available. You can also export the report as a Word or PDF document.



Supplies:


The PI/Lab Admin can view all orders made by the users of that lab.






Order Number	Order Date	Last Updated Date	Description	Placed By	Product Total	Shipping	Discount	Total Order Amount	Status
Ce8	09-03-20 09:19 AM	09-03-20 09:19 AM		UOT User1	60.00 CAD	0 CAD	0 CAD	60.00 CAD	Completed
Ce7	09-03-20 09:18 AM	09-03-20 09:18 AM		UOT User1	15.00 CAD	0 CAD	0 CAD	15.00 CAD	Completed
Ce6	09-03-20 09:12 AM	09-03-20 09:12 AM		UOT User1	40.00 CAD	0 CAD	0 CAD	40.00 CAD	Completed

The PI/Lab Admin can also create a new supply order.


- Click on 'Create a New Order'. A new window opens. Select the facility from the dropdown menu. Default labs and account codes or purpose codes will appear if applicable. If they are not, select from the lab and account code or purpose code drop down.
- After lab, specific information has been inputted into the fields, select the supplies necessary. Specify the quantity, and click on "Create an order" at the bottom of the page.





 UOT Lab1 

Select Facility Behaviour and Physiology Core

Switch to user...  SWITCH

[My HomePage](#) [Instruments](#) [Request Services](#) [Supplies](#) [PI/Lab Admin](#)

Name/Address

451 Smyth, RGN, Ottawa, ON, CA, K1H8L6, 613-562-5800 x8621, <https://med.uottawa.ca/core-facilities/facilities/animal-behaviour>

Phone: 8192109907

Projects: Not Applicable [Set as default](#)

Lab: Lab1_UOT [Set as default](#)

PO Number1: 43534 100.00 % [Set as default](#) [Don't see your PO Number?](#)



[Add more](#)

Category: All

Ship To

CA

Order Date: 09-23-20

Item	Location	Price	Quantity per Unit	Quantity In Stock	Quantity	Total
Search here 	Search here 					
Sanichips		24.99	1	2.00	1.00	24.99
Bleach		3.46	1	1.00	0.00	0.00
Linde 24070621 MPRI CO2 0.5%, O2 20.5 %, N2 Bal Sz 200		270.00	1	1.00	0.00	0.00
Nitrogen NF Spec 5.0 , Compressed		38.20	1	1.00	1.00	38.20
GOJO 516103CT FMX-12 Foam Hand Wash, Cranberry, FMX-12 Dispenser, 1250mL Pump		66.30	3	1.00	0.00	0.00
N95 masks		34.95	10	3.00	0.00	0.00
Lab Coats - L		0.00	1	5.00	0.00	0.00
Lab Coats - M		0.00	1	3.00	0.00	0.00
Shoe covers		54.99	1000	1.00	0.00	0.00
21 Bouffant cap		109.39	1000	1.00	0.00	0.00
Gloves - XS		7.87	200	10.00	0.00	0.00
Gloves - S		7.87	200	10.00	0.00	0.00
Gloves - M		7.87	200	10.00	0.00	0.00
Gloves - L		7.87	200	10.00	0.00	0.00
Gloves - XL		7.87	200	10.00	0.00	0.00

[Export to !\[\]\(85f575c90a27bbf3bca4b10844384a15_img.jpg\)](#)
[Export to !\[\]\(4e550f26fdb8f3f938df64cab6d05d06_img.jpg\)](#)
[Export to !\[\]\(d34b2e2366fa2676f12908e7946aa707_img.jpg\)](#)

Sub Total **142.62**

Client Message

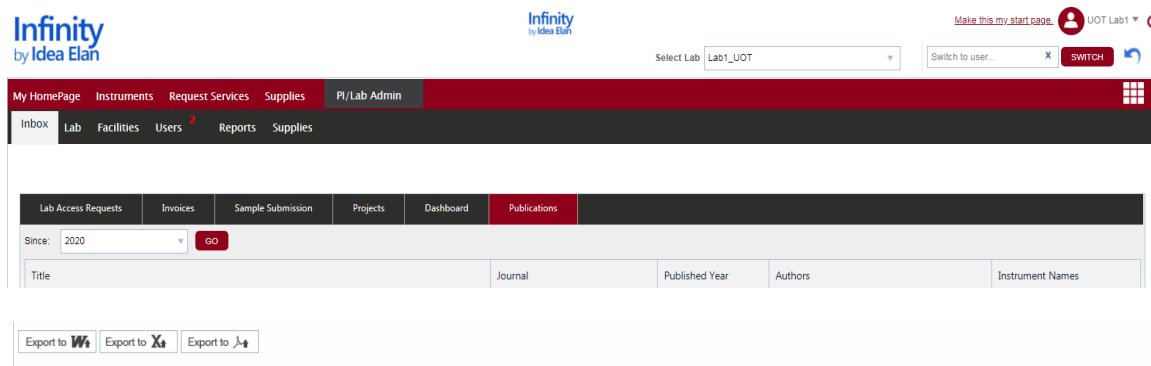
Admin Message

[SAVE AS DRAFT](#)

[CREATE AN ORDER](#)

Publications

- PI/ Lab Admins should confirm that users have used a facility before the core can present their publications. Under Inbox> Publications, PIs can view a list of user publications that facility admin have requested to claim under their core. The PI has the option to select “Yes” or “No.”



The screenshot shows the 'Infinity by Idea Elan' web application interface. At the top, there's a navigation bar with 'My HomePage', 'Instruments', 'Request Services', 'Supplies', and 'PI/Lab Admin'. Below this is a sub-navigation bar with 'Inbox', 'Lab', 'Facilities', 'Users', 'Reports', and 'Supplies'. The 'Inbox' section is active, showing a 'Lab Access Requests' tab. The 'Publications' tab is selected, displaying a table with columns: Title, Journal, Published Year, Authors, and Instrument Names. A 'Since: 2020' filter is set, and a 'GO' button is present. At the bottom, there are 'Export to' buttons for Word, Excel, and PDF.