



Idea Elan



uOttawa

Idea Elan

2021

**INFINITY Software Lab Admin
Guide**

Comprehensive Online Solution for Lab
and Core Facility Management

PI/Lab Admin guide - uOttawa

13800 Coppermine Rd,

Herndon, VA 20171

Phone: 1-800-506-5905

Email: support@IdeaElan.com

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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:

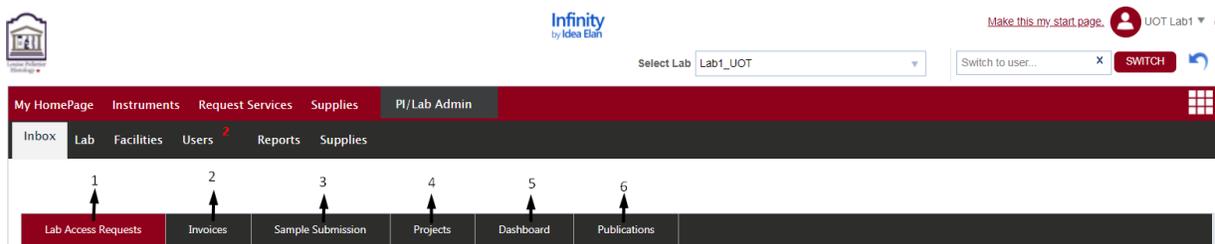
- Once logged in as a PI/Lab Admin, a toolbar with tabs will appear that are specific to your role.

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:

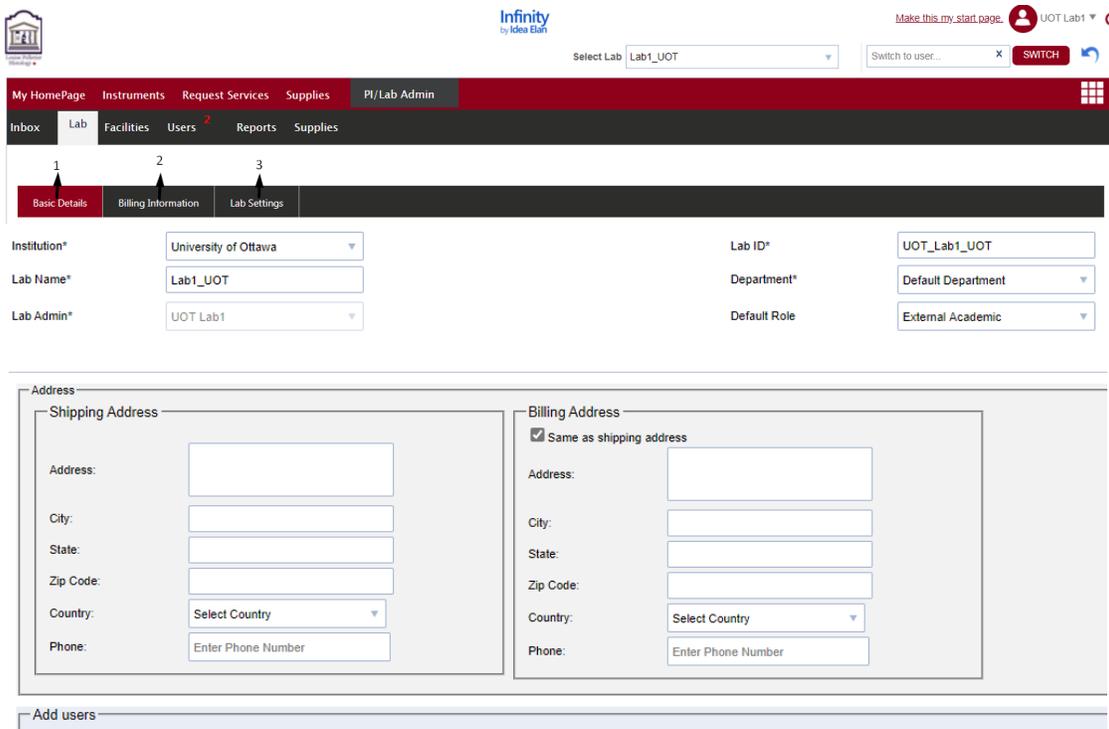


- Lab Access Requests:** To view, accept and reject user requests to the lab.
- Invoices:** To view, edit and accept invoices.
- Sample Submission:** To view sample submissions for the lab.
- Projects:** To view projects for the lab.
- Dashboard:** Displays the number of samples submitted, and the number 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



Institution* Lab ID*
 Lab Name* Department*
 Lab Admin* Default Role

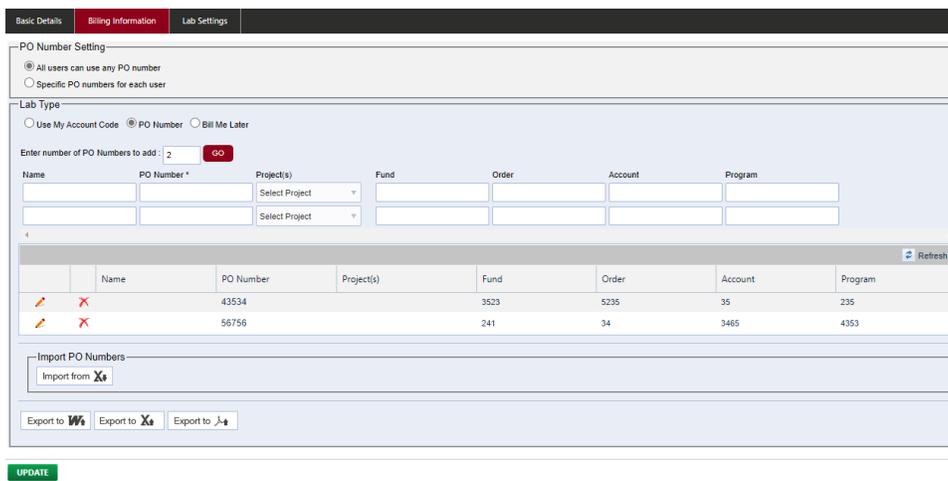
Shipping Address
 Address:
 City:
 State:
 Zip Code:
 Country:
 Phone:

Billing Address
 Same as shipping address
 Address:
 City:
 State:
 Zip Code:
 Country:
 Phone:

Add users

2. Billing Information:

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



PO Number Setting
 All users can use any PO number
 Specific PO numbers for each user

Lab Type
 Use My Account Code PO Number Bill Me Later

Enter number of PO Numbers to add:

| Name | PO Number* | Project(s) | Fund | Order | Account | Program |
|------|------------|----------------|------|-------|---------|---------|
| | 43534 | Select Project | 3523 | 5235 | 35 | 235 |
| | 56756 | Select Project | 241 | 34 | 3465 | 4353 |

Import PO Numbers
 Import from

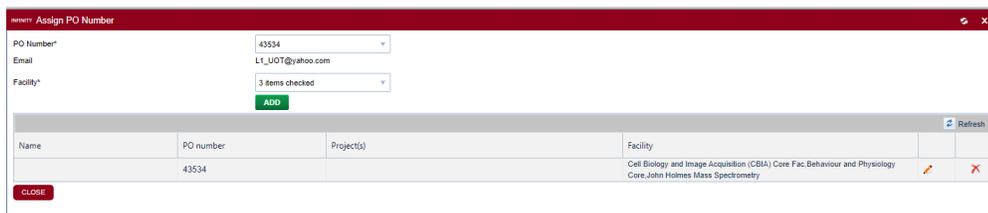
- Choose between 2 options
 - All users can use any account
 - Specific account code for each user
- If you choose to assign account codes to your users, select that option and click 'update' at the bottom of the screen.

- 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.



Assign PO Number

PO Number* 43534

Email L1_UOT@yahoo.com

Facility* 3 items checked

ADD

| Name | PO number | Project(s) | Facility |
|------|-----------|------------|--|
| | 43534 | | Cell Biology and Image Acquisition (CBA) Core Fac:Behaviour and Physiology Core,John Holmes Mass Spectrometry |

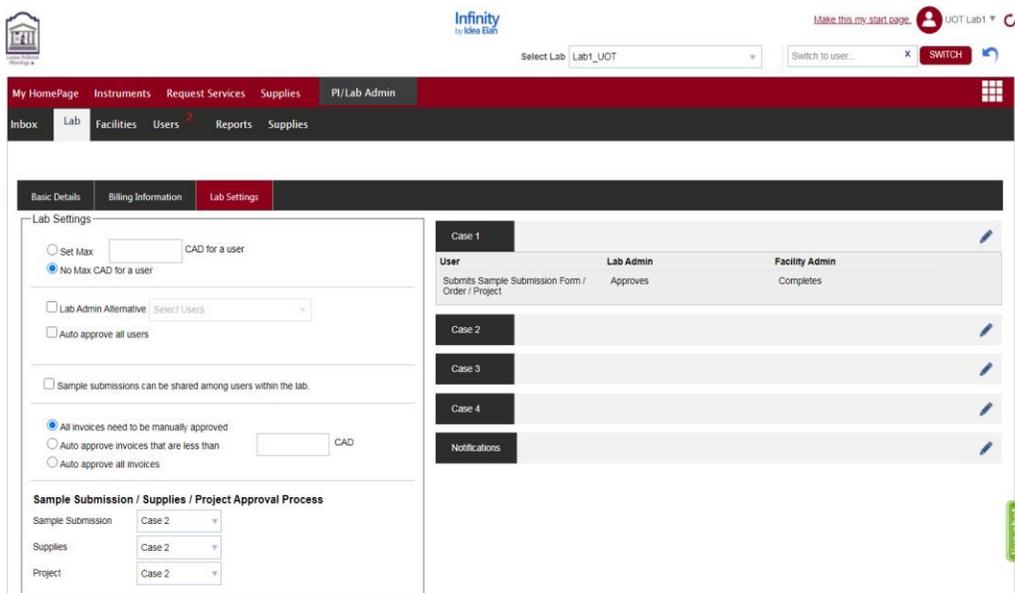
CLOSE

- 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.

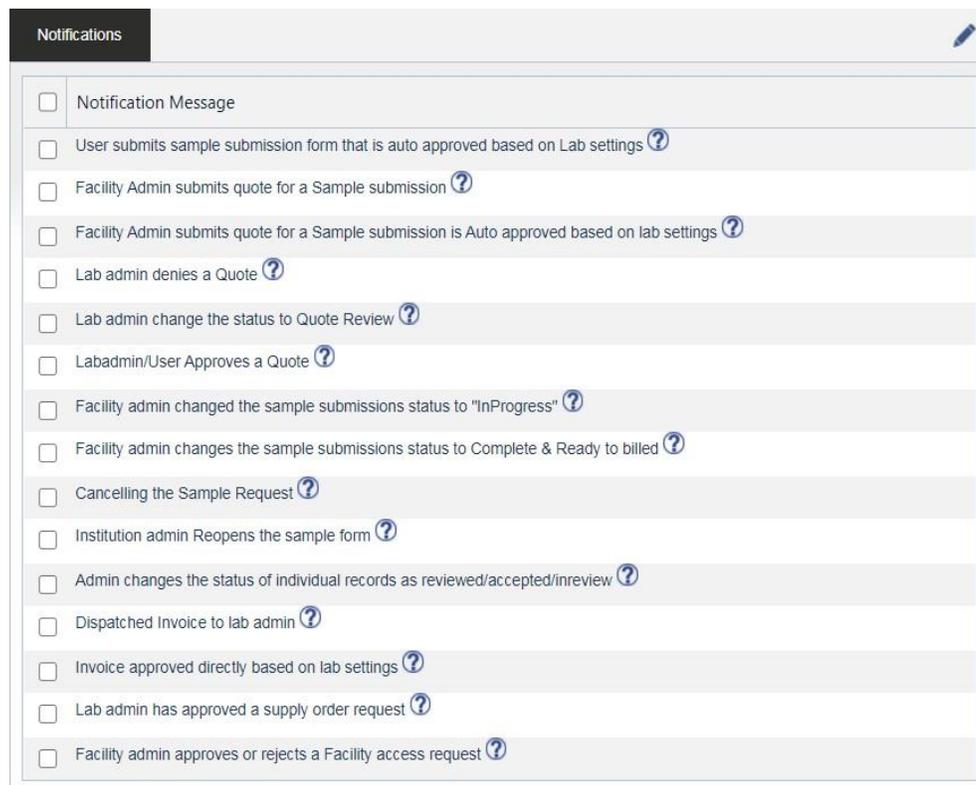
Sample Submission / Supplies / Project Approval Process

| | |
|-------------------|------------|
| 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

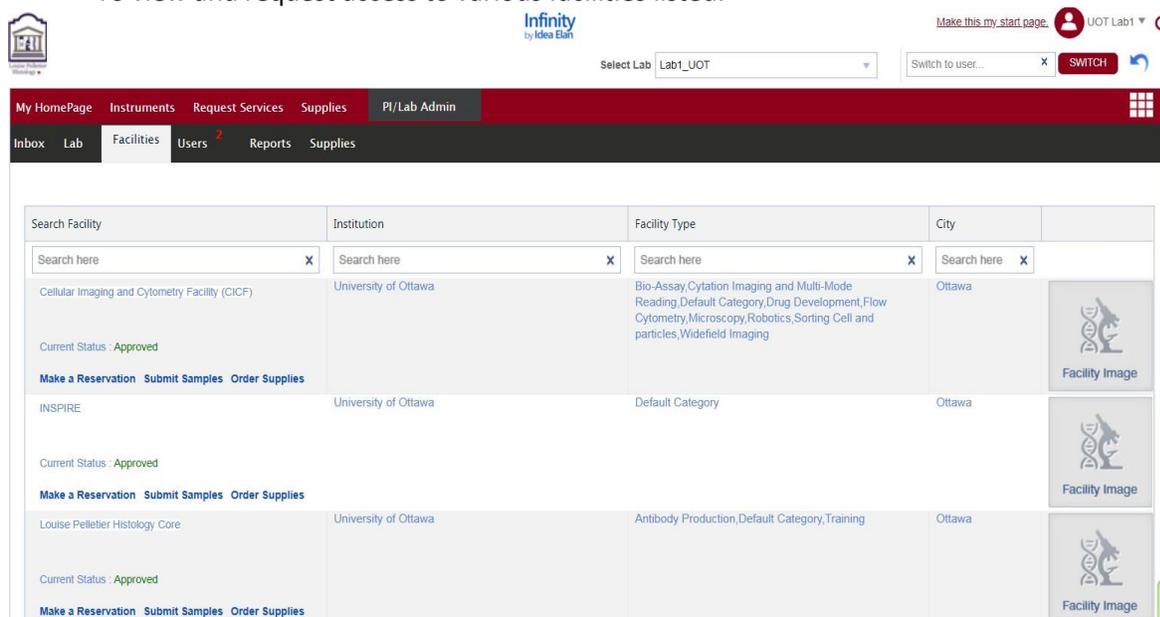


Notifications

- 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:

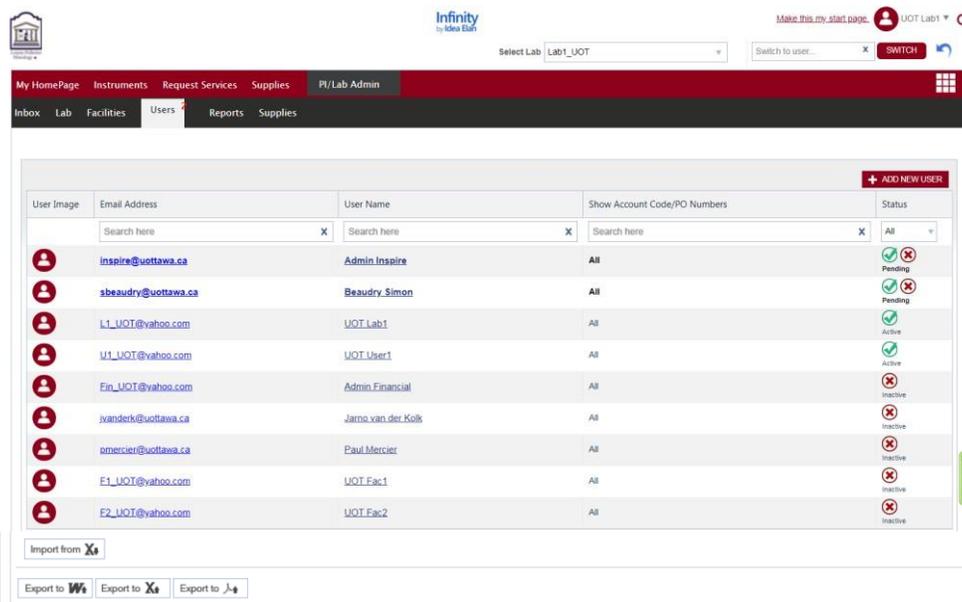
- To view and request access to various facilities listed.



| Search Facility | Institution | Facility Type | City |
|--|----------------------|---|--------|
| 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 |
| INSPIRE | University of Ottawa | Default Category | Ottawa |
| Louise Pelletier Histology Core | University of Ottawa | Antibody Production,Default Category,Training | Ottawa |

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.

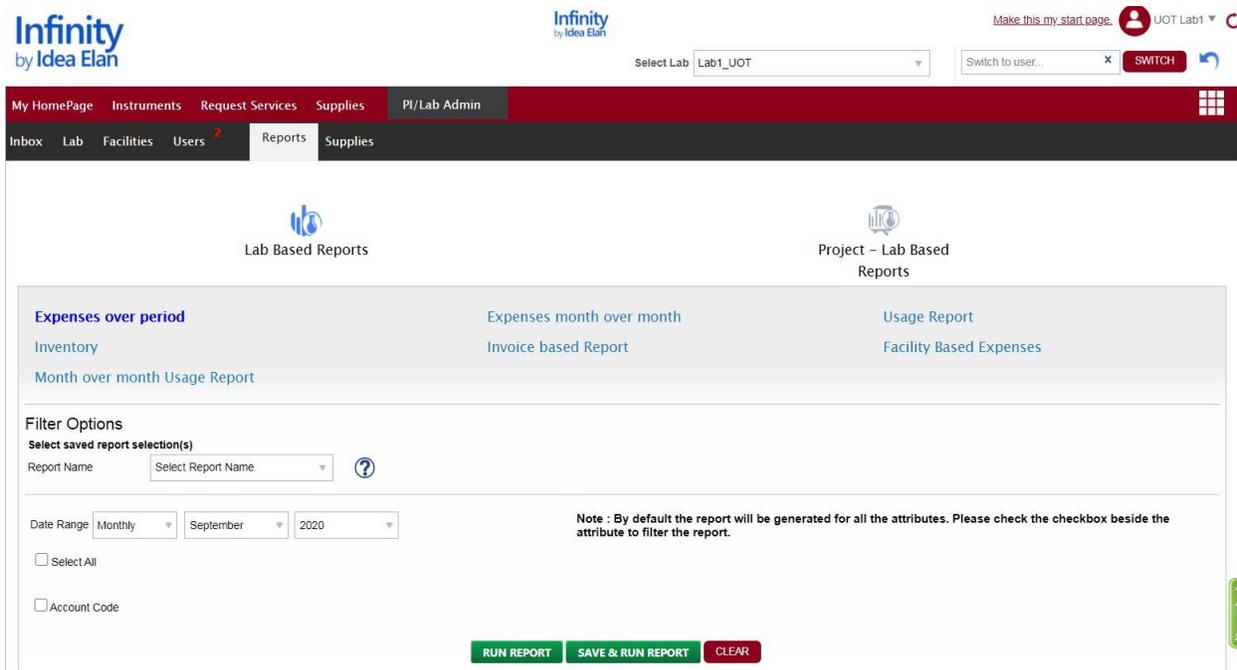


| User Image | Email Address | User Name | Show Account Code/PO Numbers | Status |
|------------|---------------------|--------------------|------------------------------|----------|
| | inspire@uottawa.ca | Admin Inspire | All | Pending |
| | sbeaudry@uottawa.ca | Beaudry Simon | All | Pending |
| | L1_UOT@yahoo.com | UOT Lab1 | All | Active |
| | U1_UOT@yahoo.com | UOT User1 | All | Active |
| | Fin_UOT@yahoo.com | Admin Financial | All | Inactive |
| | jvanderk@uottawa.ca | Jarno van der Koik | All | Inactive |
| | pmercier@uottawa.ca | Paul Mercier | All | Inactive |
| | E1_UOT@yahoo.com | UOT Fac1 | All | Inactive |
| | F2_UOT@yahoo.com | UOT Fac2 | All | Inactive |

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

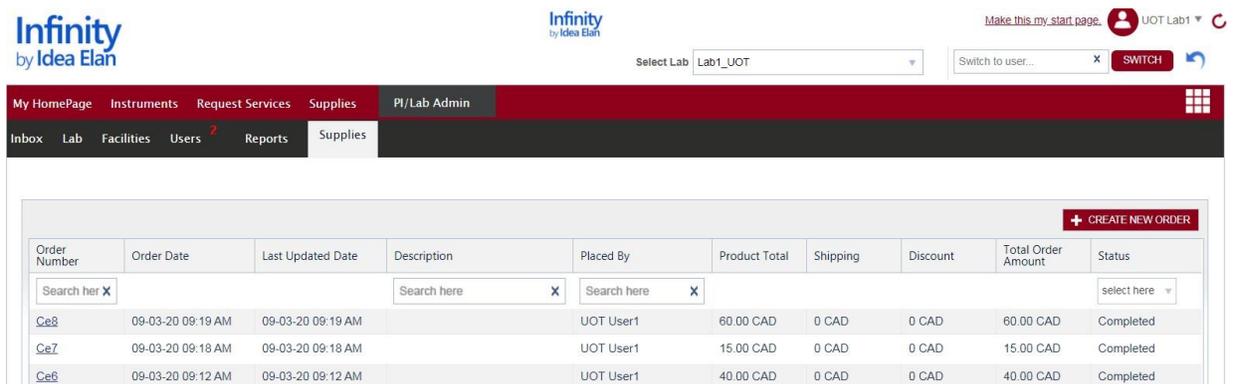
Reports:

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:

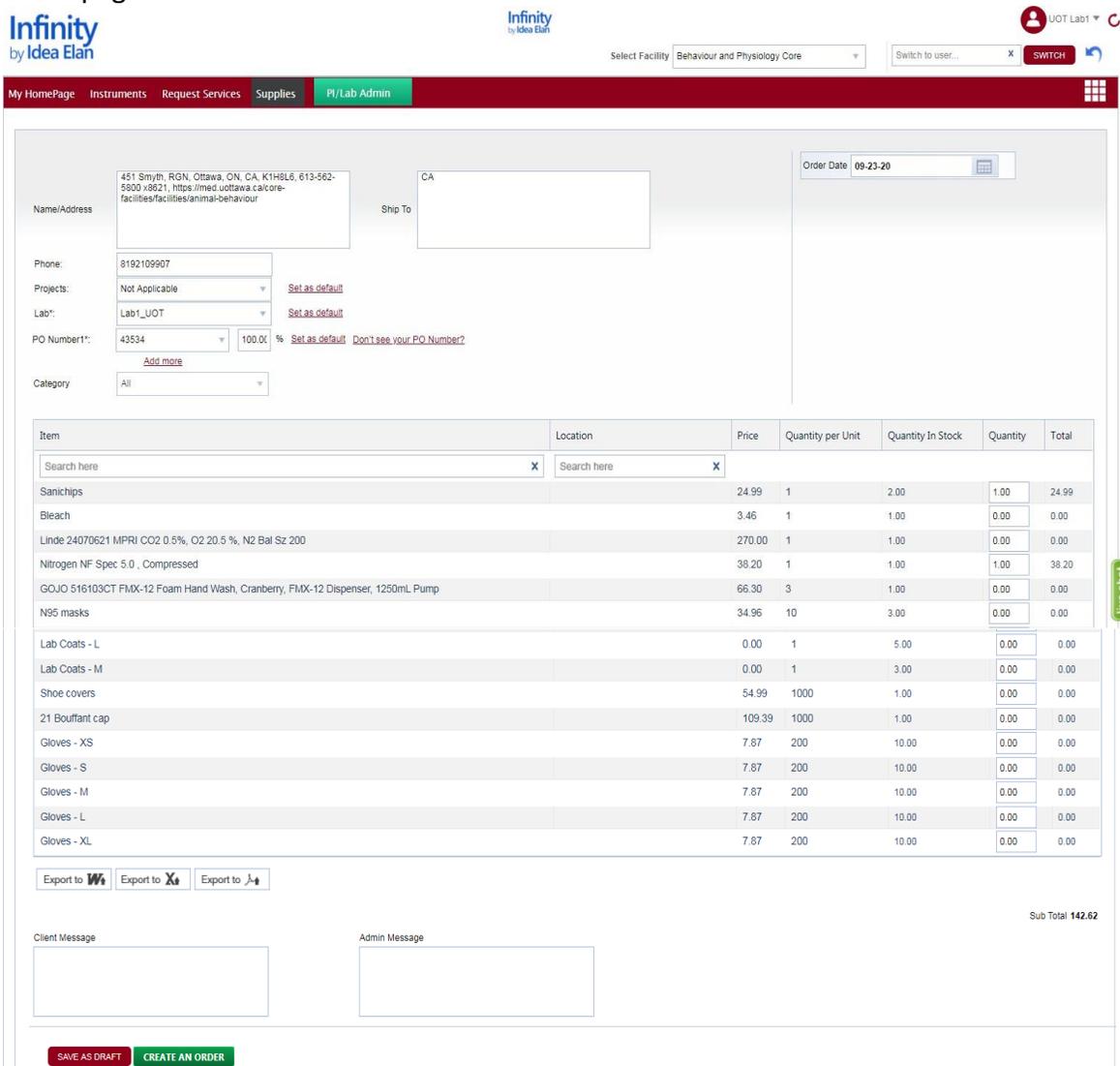
The PI/Lab Admin can view all orders made by the users of that lab.



| 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.



The screenshot shows the 'PI/Lab Admin' interface. At the top, there's a navigation bar with 'My HomePage', 'Instruments', 'Request Services', 'Supplies', and 'PI/Lab Admin'. The 'PI/Lab Admin' tab is active. Below the navigation bar, there's a header area with 'Infinity by Idea Elan' logo, 'Select Facility' dropdown (set to 'Behaviour and Physiology Core'), and a 'Switch to user...' dropdown (set to 'UOT Lab1').

The main form area contains several input fields:

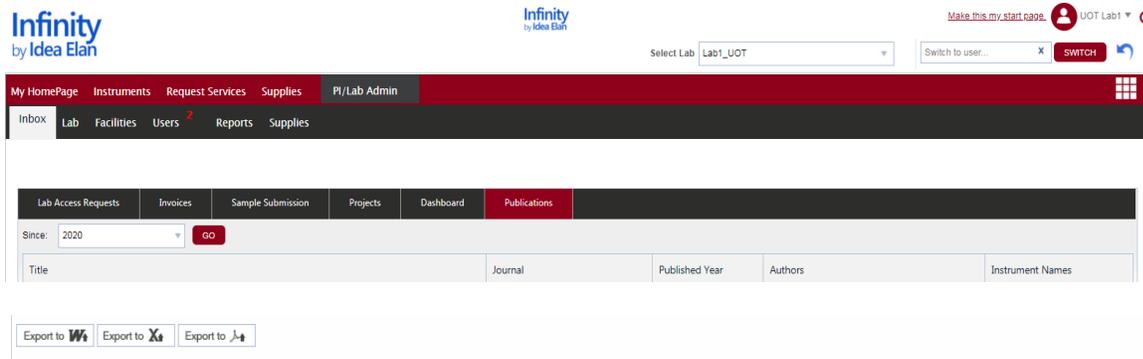
- Name/Address:** 451 Smyth, RGN, Ottawa, ON, CA, K1H8L6, 613-562-5800 x8621, https://med.uottawa.ca/core-facilities/facilities/an/mai-behaviour
- Ship To:** CA
- Order Date:** 09-23-20
- Phone:** 8192109907
- Projects:** Not Applicable (with 'Set as default' link)
- Lab*:** Lab1_UOT (with 'Set as default' link)
- PO Number1*:** 43534 (with 'Add more' link and 'Don't see your PO Number?' link)
- Category:** All

Below the form is a table of items with columns: Item, Location, Price, Quantity per Unit, Quantity In Stock, Quantity, and Total. The table lists various supplies like Sanichips, Bleach, Linde 24070621 MPRI CO2 0.5%, O2 20.5 %, N2 Bal Sz 200, Nitrogen NF Spec 5.0, Compressed, GOJO 516103CT FMX-12 Foam Hand Wash, Cranberry, FMX-12 Dispenser, 1250mL Pump, N95 masks, Lab Coats - L, Lab Coats - M, Shoe covers, 21 Bouffant cap, and various sizes of Gloves (XS, S, M, L, XL).

At the bottom of the table, there are 'Export to' buttons for PDF, Excel, and Print. A 'Sub Total' of 142.62 is displayed. Below the table are 'Client Message' and 'Admin Message' text areas. At the very bottom, there are two buttons: 'SAVE AS DRAFT' and '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 'Publications' section of the Idea Elan interface. At the top, there is a navigation bar with 'Inbox' selected. Below it, a sub-menu contains 'Lab', 'Facilities', 'Users', 'Reports', and 'Supplies'. The 'Publications' tab is active, showing a table with the following columns: Title, Journal, Published Year, Authors, and Instrument Names. A search filter is set to 'Since: 2020'. At the bottom, there are three export buttons: 'Export to Word', 'Export to Excel', and 'Export to PDF'.