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.idealabon.com/uOttawa/Public/
Go to the following URL and follow the way you would like to authenticate.
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:

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

Inbox Functions:

1. **Lab Access Requests**: To view, accept and reject user requests to the lab.
2. **Invoices**: To view, edit and accept invoices.
3. **Sample Submission**: To view sample submissions for the lab.
4. **Projects**: To view projects for the lab.
5. **Dashboard**: Displays the number of samples submitted, and the number of instrument reservations made.
6. **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

• 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.

• 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 and be set and applied.
4. Notifications
Set up notification settings
Facilities:

- To view and request access to various facilities listed.

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.
• 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.
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.
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.”