

# 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](#).

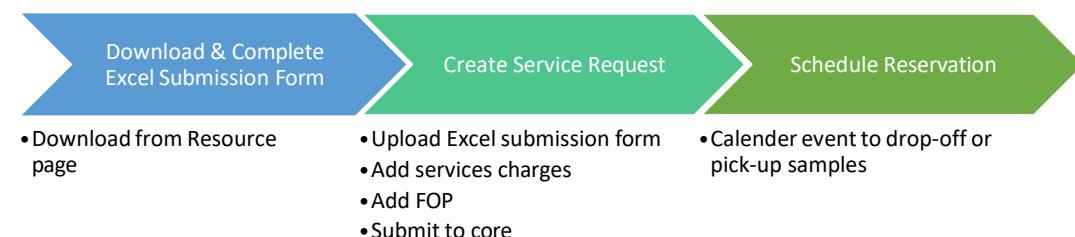
Periodically you will receive a survey from the GBCF regarding your experience interacting with the GBCF iLab service requests and calendars. Your feedback is important to us as we are continuously striving to improve our process and maintain a high quality of service.

## Workflows for GBCF Users in iLabs

### Basic Workflow



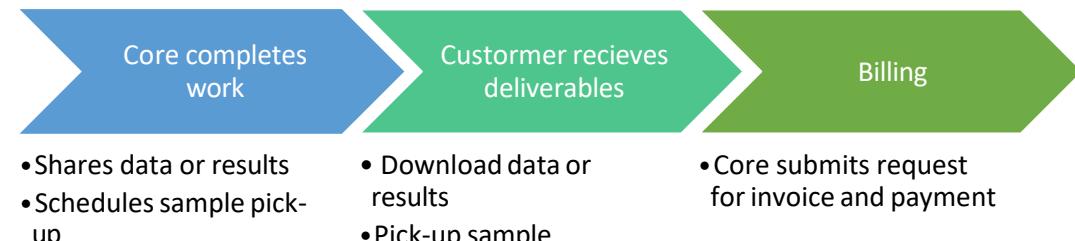
### Initiation Workflow



### 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](mailto: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](mailto: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](mailto:ndcores@nd.edu).

Q: Who do I contact for registration questions?

A: [ndcores@nd.edu](mailto: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 how 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](mailto: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 how 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:

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

## Register for an iLab account (Researcher)

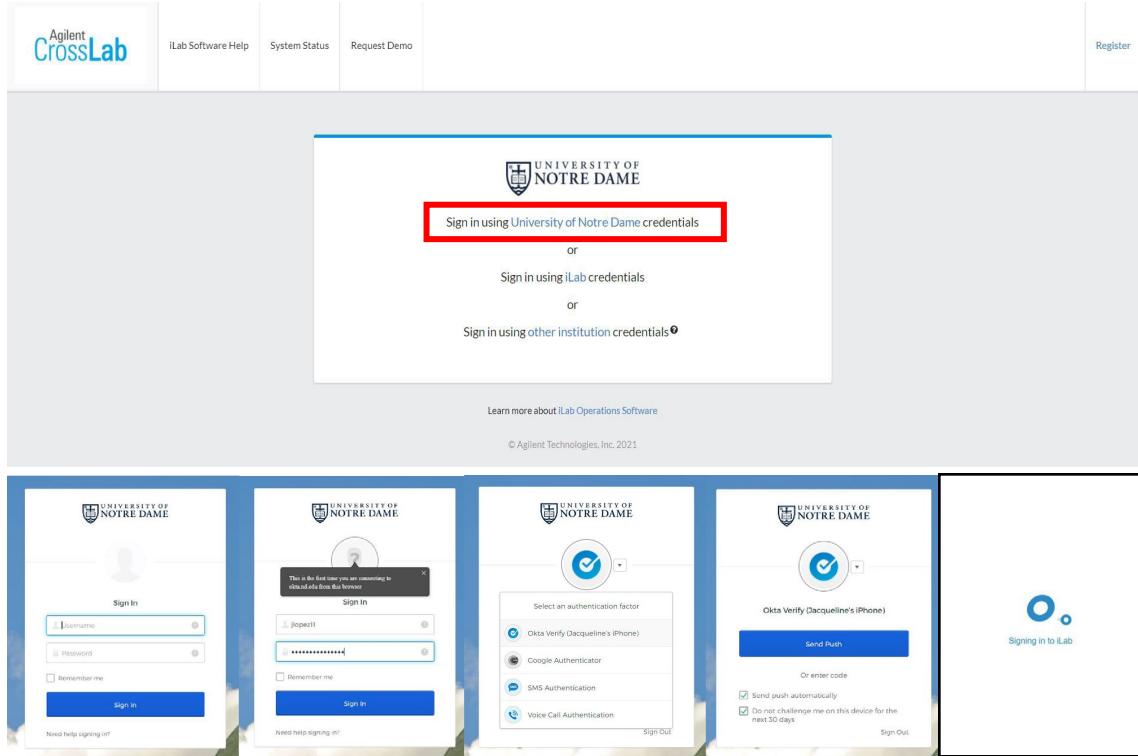
To get started, you must register for an account:

1. Open Chrome or Safari web browser. Go to [InsideND](#) 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 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.



4. 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.

5. 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](mailto:ndcores@nd.edu).*

6. 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](mailto: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.

The screenshot shows the InsideND search results page with a search term "ilab". In the "Search Results: Tasks" section, there are four items:

- Agilent CrossLab**: iLab Core Facility Management. This item is highlighted with a red box.
- Virtual Computer Lab**: OIT General Purpose - Standard
- Virtual Computer Lab**: School of Architecture
- Virtual Computer Lab**: Mendoza Analytics

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.

The screenshot shows the Agilent CrossLab log-in page. At the top, there are links for "Agilent CrossLab", "iLab Software Help", "System Status", "Request Demo", and "Register". Below this is a large central box containing the University of Notre Dame logo and three sign-in options:

- Sign in using University of Notre Dame credentials** (highlighted with a red box)
- or
- Sign in using iLab credentials**
- or
- Sign in using other institution credentials**

At the bottom of the central box, there is a link "Learn more about iLab Operations Software" and a copyright notice "© Agilent Technologies, Inc. 2021".

## 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.

1. Click on the [core facilities link](#) in the left hand menu

Core Name	Primary Contact	Email	Phone Number
University of Notre Dame	Mike Zerk	mzerk@nd.edu	1-1189
Aero-Optics Laboratory	Karl Cronberger	kcronber@nd.edu	240-797-7085
ASEND Facility	Giselle Jacobson	gjacobs@nd.edu	574-631-3556
Biophysics Instrumentation Core Facility			

Core Name	Primary Contact	Email	Phone Number
University of Notre Dame	Michael Pfeifer	mpfeifer@nd.edu	574-631-0591
Genomics and Bioinformatics Core Facility			

## 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.

The screenshot shows the 'Request Service' page of the Genomics and Bioinformatics Core Facility. At the top right, there are several navigation links: 'About Our Core', 'Schedule Reservations', 'Request Services' (which is highlighted with a red box), 'View My Requests', and 'Contact Us'. Below these, there are two main sections: 'Announcements' and 'Request Service Instructions'. The 'Announcements' section contains a message about updates to service pages and links to new policies and submission forms. The 'Request Service Instructions' section provides guidance on how to request services like next-gen or single-cell library preparation and sequencing. Both sections have their own red boxes around them.

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.

The screenshot shows the 'Request Service List' page. It displays a list of service categories, each with a brief description and a 'request service' button. The categories include 'Genomics & Bioinformatics Project Support (Consultation)', 'Sanger Sequencing & Fragment Analysis (Standard Service)', 'Sample QC (Standard Service)', 'Fragmentation & Size Selection (Standard Service)', 'Illumina Library Prep and Sequencing (Next-Gen Sequencing)', 'Single-Cell Gene Expression (Single-Cell Sequencing)', and 'Services Provided (Price List)'. The 'Sanger Sequencing & Fragment Analysis (Standard Service)' section is highlighted with a red box.

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.
- Service Request Name**
  - Basic Workflow:** Hover over each step for additional information.
  - Service Request ID and Customer information:** Auto-generated identifier for your specific request. Customer information capture for your account during the one-time registration.
  - Forms and Request Details:** This section contains custom iLab forms that need to be completed as part of your request. (***Excel Submission Form is completed separately and attached here.***)

**Sanger Sequencing & Fragment Analysis**

**Basic Workflow:**

- Initiation
- Agreement
- Approval
- Execution
- Completion

**Service Request ID** (unique identifier for this request)

Request Name: GBCF-JL-[CID]  
Customer: Jacqueline Lopez Lab: Admin (ND) Lab  
Email: jlopez11@nd.edu Phone: 574-631-1902

**Forms and Request Details**

(see bottom of list to add items to this request)

**View Form: capillary\_form\_standard - CF-5193571-1**

**Reminders**

- Schedule Reservation tab: View "Sample Processing" Calendar to select a day and time to "drop-off" your sample.
- Excel Submission Form: Right click and "save link as" to download: Full-Service Form or Ready to Run Form; else visit the Resource page.
- Deliver an aliquot of your sample. Do not submit your entire sample; the excess sample will be discarded after results are shared.
- "Sample Name" on the tube's lid or "Plate name" on the 96-well plate must be the same as written in your Excel Submission Form.

**Form Instructions**

Use this form to initiate your service request. If successful, charges with a quantity and total price appear below this Form. Save Form as Draft to continue working on it. Required questions indicated by a red asterisk (\*) are required to be filled to Save Form as Complete and receive a "Yellow" status.

**Excel Submission Form**

\* Upload Excel Form:  
 please upload  
No

Need to upload additional Excel Forms?  
Additional information you'd like us to know:

6. Custom Form: Each service request will have a specific custom form, which is updated periodically.
- View Form and Status:** Collapse and expand the custom form. Status is “Not Started”.
  - Excel Submission Form:** Right-click on the link to download a current version.
  - 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.

The screenshots illustrate the workflow for uploading an Excel submission form:

- Screenshot 1:** Shows the 'Reminders' section with a red box around the 'View Form' link and the 'Not Started' status bar.
- Screenshot 2:** Shows the 'Excel Submission Form' section with a red box around the 'please upload' button. A right-click context menu is open over the 'please upload' button, with 'Save link as...' highlighted.
- Screenshot 3:** Shows the 'Excel Submission Form' section after a file has been uploaded. A red box highlights the 're-upload' button, which now displays the uploaded file name: 'GBCF-JL-CID\_full\_service\_sanger\_seg\_form\_v01012020.xlsx'.

- 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 contains two screenshots of the iLab Services section. Both screenshots show a list of services with one item selected: "Full-Service Sanger Sequencing". The quantity is set to 24.0. A green button labeled "Add selected services" is visible. A red box highlights the "Add selected services" button and the message "Selected charges added (see below). Click only to add again." A blue arrow points from the top screenshot to a callout box containing the instruction: "Click ‘Add selected services’ once and wait 5 seconds for charges to appear." Below the screenshots is a note: "Edit or change quantity here".

**Screenshot 1 (Top):**

- Services
- \* Your sample type is:  Full-Service Sanger Sequencing  Ready to Run Sanger Sequencing  Ready to Run Fragment Analysis
- For Full-Service sample, enter quantity: 24.0
- Add selected services** Selected charges added (see below). Click only to add again.

Please save your form! save completed form save draft of form

After saving your form, please submit your request to the core.

Jan 10 01:03 PM	Full-Service Sanger Sequencing, per reaction Sanger Sequencing & Fragment Analysis	Quantity: <input type="text" value="24.0"/>	Unit Price: \$5.50	Total: \$132.00	Billing Status: Not Ready To Bill	Work Status: Proposed	
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**Screenshot 2 (Bottom):**

- Services
- \* Your sample type is:  Full-Service Sanger Sequencing  Ready to Run Sanger Sequencing  Ready to Run Fragment Analysis
- For Full-Service sample, enter quantity: 24.0
- Add selected services** Selected charges added (see below). Click only to add again.

Please save your form! save completed form save draft of form

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.

After saving your form, please submit your request to the core.

Jan 10 01:03 PM	Full-Service Sanger Sequencing, per reaction Sanger Sequencing & Fragment Analysis	Quantity: <input type="text" value="24.0"/>	Unit Price: \$5.50	Total: \$132.00	Billing Status: Not Ready To Bill	Work Status: Proposed	
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- 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.

**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.
- Click “Split Cost” to charge a percentage of your projected cost to multiple FOPs.
  - 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)**

100.0% Total Allocated

enter additional payment information

**Payment Information**

Please enter the FOP (Activity Code)

% **FOP (Activity Code)**

You do not have access to any FOPs. To resolve this problem, please contact the PI or financial manager of your lab.

100.0% Total Allocated

enter additional payment information

**Forms and Request Details**

(see bottom of list to add items to this request)

**View Form: capillary\_form\_standard - CF-5193571-1**

► Jan 10 Full-Service Sanger Sequencing, per reaction  
06:59 PM Sanger Sequencing & Fragment Analysis

Quantity:	24.0	Unit Price:	\$5.50	Total:	\$132.00	Billing Status:	Not Ready To Bill	Work Status:	Proposed
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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: \$

- 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
- “Save draft request” to further review or edit, OR
  - “Submit request to core”. You will be direct to the “View My Requests” tab.

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.

The screenshot shows the Agilent CrossLab iLab Operations Software interface. At the top, there is a navigation bar with links for 'About Our Core', 'Schedule Reservations' (which is highlighted with a red box), 'Request Services', 'View My Requests', and 'Contact Us'. Below the navigation bar, the main content area displays the 'Genomics and Bioinformatics Core Facility' logo and information. A dropdown menu labeled '▼ Request Service' is visible on the left.

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.

The screenshot shows the 'Schedule Reservation Calendars' page. The 'Sample Processing' calendar is selected and highlighted with a red box. On the right side of the screen, there is a 'View Schedule' button, which is also highlighted with a red box.

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:

The screenshot shows the 'How to schedule a reservation for sample processing' page. It features a weekly calendar for the week of January 10-16, 2021. The available times for reservations are highlighted in blue. A callout box with the text 'Available days and times highlighted blue' points to the blue-highlighted areas on the calendar. Arrows indicate the specific times (10:00 AM and 1:00 PM) that are highlighted.

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.
- Reservation details:** Information about the reservation, such as the specific resource, the lab and when it was created.
  - Instructions:** This section is updated frequently. Please read each time.
  - 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.
  - Collaborators:** Collaborators are iLab members who have the same permission as the owner. Collaborators can view and edit reservations.
  - 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.***)

The screenshot shows the 'Reservation details' tab of the iLab reservation interface. The 'General' tab is selected. The 'Comments' and 'Contacts' tabs are also visible. The 'Reservation details' section includes fields for 'For: Drop-Off (Spot #1) - Sample Processing (no charge) - My Reservation', 'Lab: Pfleider, Michael (ND) Lab', and 'Created on: January 08, 2023 18:27'. Below this is the 'How to schedule a reservation' section, which contains instructions and a note about cost. The 'Collaborators' section has a field 'Add collaborators to this event'. The 'Required forms' section contains a form with fields for 'Phone Number (for contact in case of problem)', 'Number of tubes', 'Number of plates', 'Additional information you'd like us to know', and 'Service Category'. Buttons at the bottom include 'Save Reservation', 'Cancel Changes', 'Save & Confirm Usage', and 'Delete Reservation'.

- 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.

The screenshot shows the 'General' tab of the iLab reservation interface. The 'Comments' and 'Contacts' tabs are also visible. The 'Times' section shows a scheduled reservation from 'Jan 13 2021 09:45 AM' to 'Jan 13 2021 10:00 AM'. The 'Use and cost of reservation' section shows a duration of '0.25 hours' with an effective rate of '\$0.00' and a total cost of '\$0.00'. The 'Service Project' section allows assigning an ongoing project, with a dropdown menu showing 'Select existing project'. The 'Invite additional people to this event by email' section has a text input field for email addresses. Buttons at the bottom include 'Save Reservation', 'Cancel Changes', and 'Delete Reservation'.

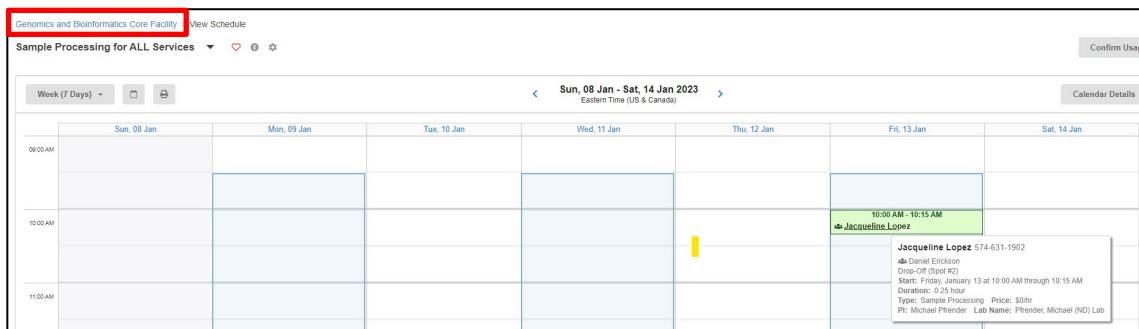
- g. **Use and cost reservation:** There is no cost. Reservation are non-billable events.
- h. **Service Project:** If you have an ongoing project that is related to this reservation you may see this option to link a service project to the reservation. The service project does have to be under your name 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.

- 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 increasing 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".

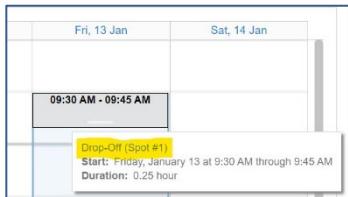
### **What is the difference between a time slot and time spot or "resource"?**

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.

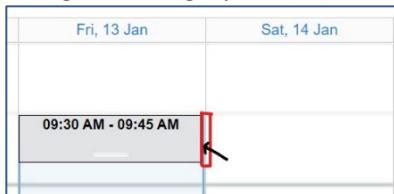
Within a given time slot, a specific number of time spots are available. The time spot is defined as a "resource". These resources are categorized as either "Drop-Off" or "Pick-Up" spots. A different end-user may select an available spot or "resource" for a reservation.

### **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.

The first screenshot shows a single reservation entry with a green header. The second screenshot shows the same entry with a calendar overlay, and the 'Save' button is highlighted with a red box.

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

This screenshot shows the 'Required forms' step of the reservation process. It contains several input fields with validation stars (\*). The 'Service Category' dropdown is set to 'Standard' and the 'Samples are for' dropdown is set to 'Ready-to-Run Fragment Analysis'.

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.

The left screenshot shows a reservation for Daniel Erickson from 09:30 AM to 09:45 AM on January 13. The right screenshot shows another reservation for Daniel Erickson from 09:30 AM to 09:45 AM on January 13, with a tooltip showing detailed service 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 Requests' interface. At the top right, there are several buttons: 'About Our Core', 'Schedule Equipment', 'Request Services', 'View My Requests' (which is highlighted with a red oval), and 'Contact Us'. Below these are two buttons: 'Reload Active Requests' (highlighted with a red oval) and 'Fund 12345'. To the right of 'Fund 12345' is a green bar with the text 'active requests' and a downward arrow. On the far right of the header is a small orange circle with the number '3'. In the main content area, there is a message: 'Searching within active requests: Results in this tab are restricted by Status (show details). Please use the filter panels in the left-hand menu to drill down to requests of interest. You can also save filters to custom tabs! Click here for more details.' Below this message is a table titled 'Displaying 7 out of 7 results. (Page 1 of 1)'. The table has columns: date, for, service id, status, and cost. Each row contains a 'Submit' button. The table ends with a note: 'completed: Feb 24'. On the left side of the page is a vertical 'Filters' panel. It includes sections for 'Keywords', 'Status' (with options: Completed, Requested, Researcher Draft, Researcher In Agree), 'Category', 'Labels', 'Assigned To', 'Lab', 'Owner', 'Institution', 'Payment Number', 'Payment Method', 'Request Date', 'Start Date', 'Due Date', 'Completed Date', and 'Applied Filters'. There are also buttons for 'Reset Filters', 'Create Tab from Filters', and 'Download Results as CSV'. Numbered circles (1 through 5) are overlaid on the filters panel and the top right buttons to correspond with the numbered list above.

## 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)

- 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”.

<input checked="" type="checkbox"/> submit request to core	<input type="button" value="save draft request"/>	<input type="button" value="Cancel"/>
--	---	---------------------------------------

- After clicking either button, you are redirected to the “View My Requests” tab.
- 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”.

Genomics and Bioinformatics Core Facility

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About Our Core | Schedule Reservations | Request Services | View My Requests | Contact Us | Reload Active Requests | ▾ active requests

Searching within active requests: Results in this tab are restricted by Status ([show details](#)). Please use the filter panels in the left-hand menu to drill down to requests of interest. You can also save filters to custom tabs! [Click here for more details.](#)

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-[CID] Sanger Sequencing... Standard Service	Waiting to Submit to Core	\$45.00 (\$45.00)

[Submit](#)

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

date

▼ Jan 18 (Jan 18 2021)

for

Daniel Erickson  
Fraser, Malcolm (ND) Lab

service\_id

GBCF-DE-[CID]  
Sanger Sequencing...  
Standard Service

status

Waiting to Submit to Core

cost

\$45.00  
(\$45.00)

[Submit](#)

[Overview](#)

[Payment Information](#)

[Collaborative Cores](#)

No collaborative options are set on this service request.

[Forms and Request Details](#)

**a** [View Form: capillary\\_form\\_standard - CF-5216661.7](#)

**b**

Quantity:

Unit Price: \$2.25 Total: \$45.00 Billing Status: Not Ready To Bill Work Status: Proposed

**c**

**d**

Comments

Attachments & URLs

Service Request History

Billing Information

- 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)	

- Only the Core can change or edit the charges within your request at this point.
- 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

Collaborative Cores

No collaborative options are set on this service request.

▼ Forms and Request Details

View Form: capillary\_form\_standard - CF-5216661-7

▶ Jan 18 05:19 PM	Ready to Run Sanger Sequencing/Fragment Analysis, per well Sanger Sequencing & Fragment Analysis	Quantity: 20.0	Unit Price: \$2.25	Total: \$45.00	Billing Status: Not Ready To Bill	Work Status: Proposed	Completed	
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Comments [add comment](#)

Attachments & URLs [add attachment](#) [add url](#)

▶ Service Request History

▶ Billing Information

[edit](#) [Shipping Information](#) [edit](#)

- “Waiting for Core to Begin”: Core has agreed to your request, but work has not started.
- “Processing”: The Core has begun working on your request.
- “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) → **PI\_Lab\_Data\_GBCF**

b. Sample QC: iLab Service Request Attachments and URL section.

↓

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

## 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)

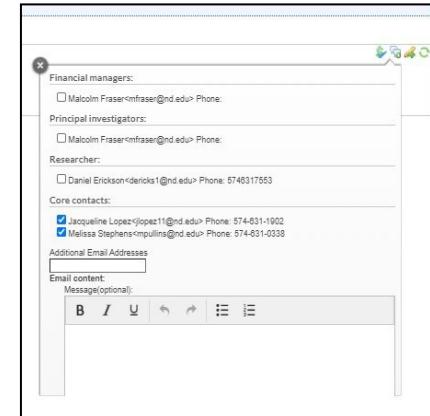
Adding comments to your service request is the best way for the User and Core staff to communicate back and forth. Unlike message sent through ND or personal email accounts, messages are labeled with the Service ID and neatly organized within the comments section of the request and the communication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

The screenshot shows the Agilent CrossLab iLab Home page. In the top navigation bar, there is a 'Home' button and a 'Communications (4)' button. Below the navigation, there is a 'Communications' section with a yellow header. It displays a list of comments from the previous day:

- Jan 18 2021 GBCF-DE-46
  - 06:16 PM Hello Daniel Erickson.
  - Service request GBCF-DE-46 has been completed by core Genomics and Bioinformatics Core Facility.
- Jan 18 '21 Jacqueline Lopez left a comment:
  - 06:17 PM DO NOT BILL FOR THIS ORDER
- Jan 18 '21 iLab System left a comment:
  - 06:18 PM Hello Daniel Erickson.
  - Service request GBCF-DE-46 has been completed by core Genomics and Bioinformatics Core Facility.



This screenshot shows the details of a service request (GBCF-DE-46). The 'Comments' tab is selected. It shows a list of comments from the previous day, identical to those in the Home page screenshot. Below the comments, there is a 'Send Message' button and a red box highlighting the 'Recipients' field. The main service request details are visible at the top, including the service ID, status, cost, and a 'Completed' link.

## 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.

<b>Request Group Access</b>  Institution * <input type="text" value="University of Notre Dame"/> <div style="border: 1px solid #ccc; padding: 5px; width: 100%;"> <a href="#">University of Notre Dame</a> </div>
<b>Request Group Access</b>  Institution * <input type="text" value="University of Notre Dame"/> Group * <input type="text" value="O'Tousa"/> <div style="border: 1px solid #ccc; padding: 5px; width: 100%;"> <a href="#">O'Tousa, Joseph (ND) Lab</a> </div>
<b>Request Group Access</b>  Institution * <input type="text" value="University of Notre Dame"/> Group * <input type="text" value="O'Tousa, Joseph (ND) Lab"/>  <div style="text-align: right;"> <a href="#">Cancel</a> <a href="#" style="background-color: #0070C0; color: white; border: 1px solid #0070C0; padding: 5px 10px;">Request Access</a> </div>

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

## 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		theilab@ilabx.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](mailto: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](mailto:genomics@nd.edu).

For all iLab registration and financial questions, contact [ndcores@nd.edu](mailto:ndcores@nd.edu).

If you experience a problem with the iLab system, please contact [ndcores@nd.edu](mailto: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

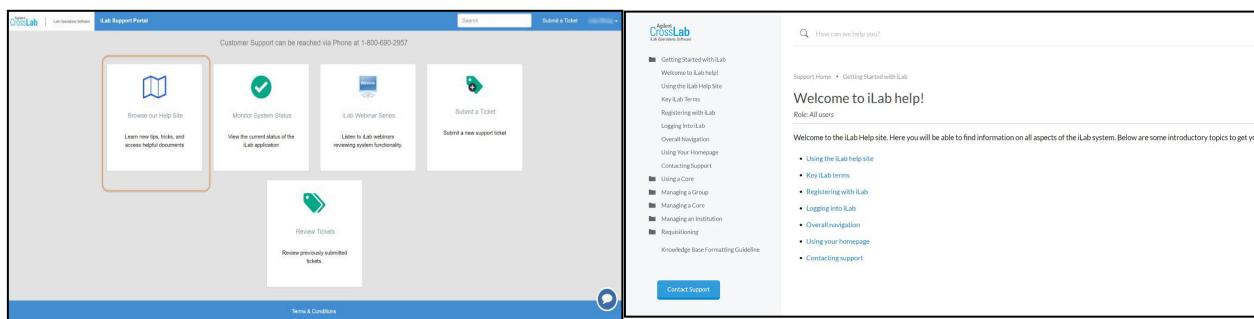
The [iLab Help Site](#) is dedicated to supplying documentation for different actions, roles, and elements in the system. The help site is continuously updated so check back frequently for new articles and updates.

Bookmark the page in your browser for easy access.

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

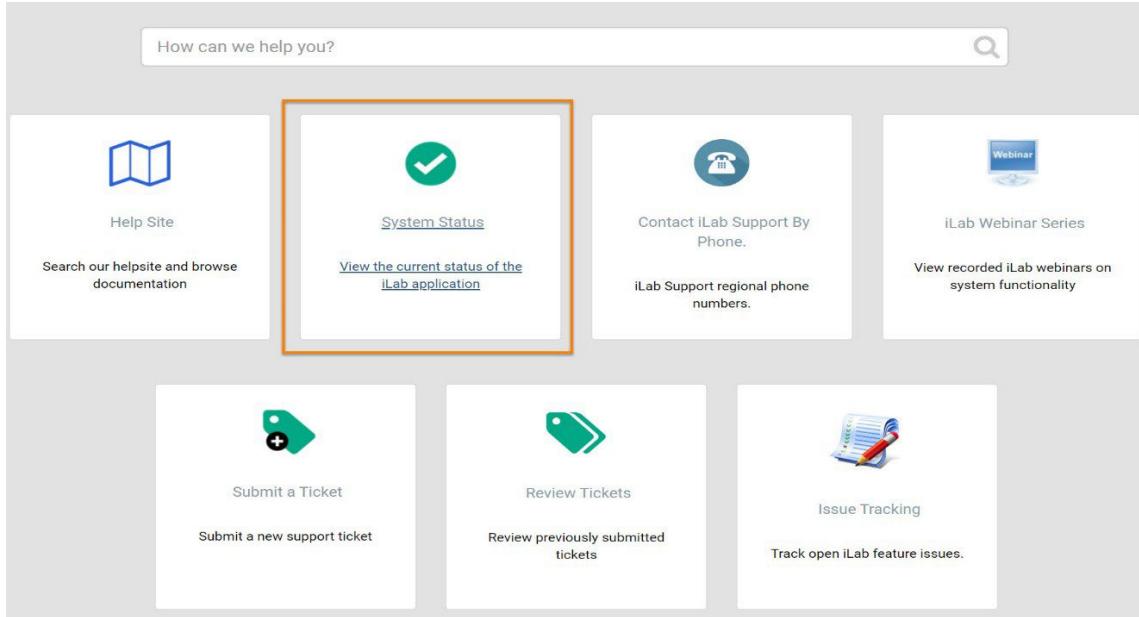
The iLab help site can be located by selecting the *HELP* link in the upper right-hand corner of the screen. Then select *Access to iLab’s help site on the left-hand side*.

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](#)