iLab Solutions

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iLab Solutions: Core Facilities Scheduling Core Customer Help Manual

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iLab Solutions: Core Facilities Scheduling Core User Help Manual
Revision Date: 1/21/2013

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Overview

iLab is designed to help core facilities manage the process of requesting and billing for services rendered and the use of equipment.

Instructions on how to access the system should be provided to you in a separate communication. Please contact core staff or other appropriate personnel if you did not receive these instructions.

If you experience any problems using iLab, do not hesitate to click the **leave iLab feedback** link in the upper right hand corner once you are logged in. The leave iLab feedback link will give you the most comprehensive iLab support. Alternatively, send an email to support@ilabsolutions.com with your question and we will respond as soon as we can.

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My Homepage

When you first log into iLab make sure you update your time zone by choosing your correct time zone and then clicking on ***Update my time zone***. After you update your time zone, you will either land on the core's page you logged into or you may land on your homepage (*Figure 1*). On your homepage you can view quick links to facilities you often use, view requests that require your attention and view a list of your reservations. You have menu options to manage your account, manage your support tickets and find lists of cores that you can access through iLab when you are on any page in iLab.
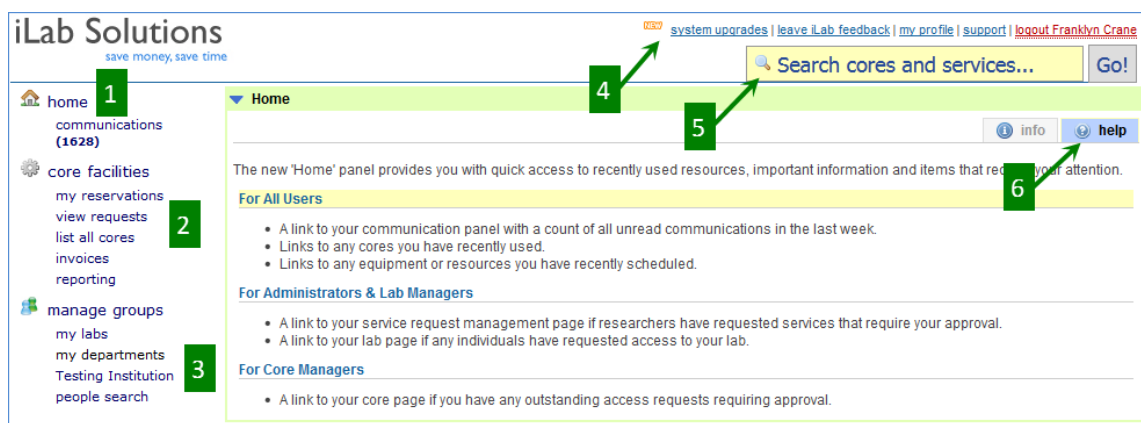
Figure 1. **When you first log into iLab, you may land on your homepage. You can also navigate to the homepage by clicking on home at the upper-left corner. On the homepage you can find quick links to cores, requests and services that are relevant to you.**

The options on the left-hand panel and upper-right panel can be accessed regardless of the page you are on in iLab. The home menu option on the left side of the page (*Figure 1.1*) will take you to your homepage and homepage panels. Under home is the Communications menu option where you can view emails sent through the iLab system. If your lab also utilizes the iLab Lab Management system, you will see menu options on the left side of the page for requisitioning.

Under core facilities (*Figure 1.2*) you may see my reservations where you can view past and future reservations you have with cores. You can see requests of services or projects that you have submitted to cores from the view requests link and you can see a list of cores that you can access from list all cores.

Under manage groups (*Figure 1.3*) you can view my labs to see details about your lab and lab members. If you are a Principal Investigator or Lab Manager please review PI + Financial Admin Training Manual for more details about managing your lab in iLab.

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The upper-right hand corner provides links for you to view recent updates, contact iLab support with *leave iLab feedback*, manage your account in *my profile* and manage your created support tickets from *support* (*Figure 1.4*). If you contact us through leave iLab feedback, you will be sending a message to the iLab support team so you will receive the most comprehensive support. This will also enable you to track your support tickets. You can view the support tickets you have sent by clicking on support. You can view manuals (like this one) with basic instructions on how to make a request and reservations on Generic Help Documents on the support page.

In *my profile* you can update your name, log-in information, password, and manage how you want to receive system-generated messages in Manage Communications Preferences.

Under the menu options is a search bar. If you are only a user of cores, you can use this search bar to find services and resources list in iLab for your institution (*Figure 1.5*). If you also use our lab materials requisitioning system, you can search for core facility services and for products.

When you are on your homepage, you will have panels with different kinds of information. Each panel will have a help tab (*Figure 1.6*) with more information about what you can see in the panel.
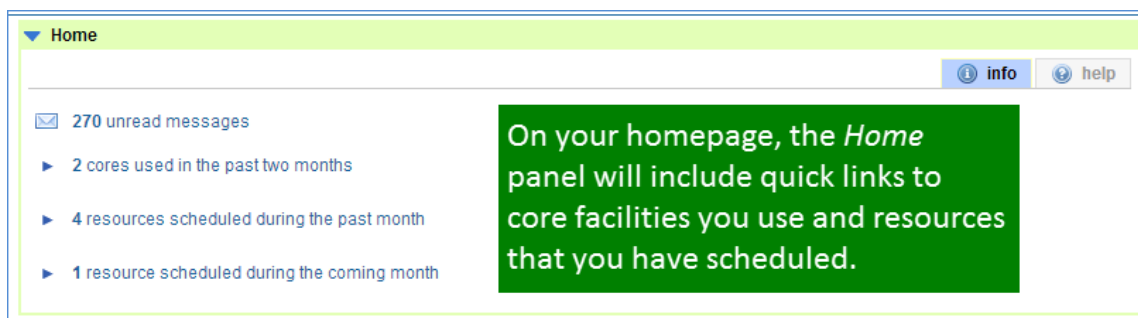
Figure 2. **You can access quick links to cores and resources you have used in iLab in the panels on your homepage.**

Under the Home panel you may see a Service Request panel. This panel will have any requests that require your attention in the alerts tab (*Figure 2*). Requests that require attention could be ones that require your approval, ones that are missing payment information or ones that you have not been submitted to the core. Lab heads will see requests from all of their lab members and for themselves that require approval in the Service Request panel.
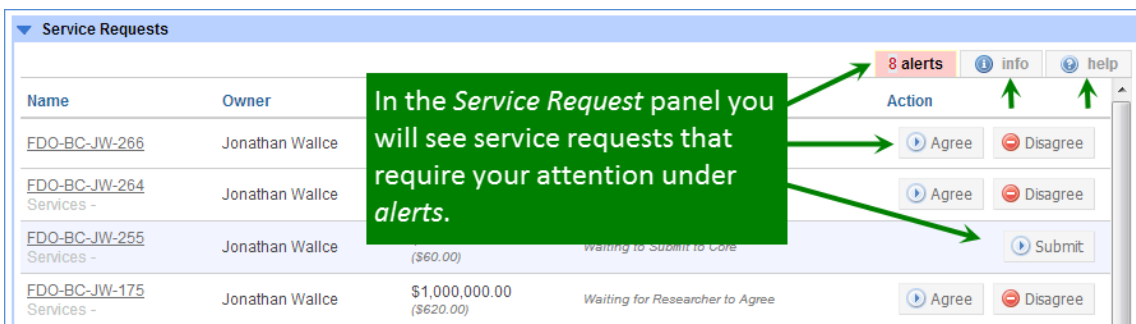
Figure 3. If you have any service requests with any cores in iLab, you will see the *Service Request* panel on your homepage. In this panel you will see requests that require your attentions under *alerts*. The *info* tab researchers see all of their own requests across the cores in the system for a 6 month period. The *help* tab gives you more information about the *Service Requests* panel.

Under the info tab you will see up to twenty of your most recent requests (*Figure 3*). For more information about the Service Request panel, click on the help tab.

You may also see a Scheduled Events panel on your homepage. This panel will show any of your reservations that are still pending core approval in the alerts tab, and all of your future reservations, up to fifteen, in the info tab. Again, click on the help tab to see more information about the Scheduled Events panel (*Figure 4*).
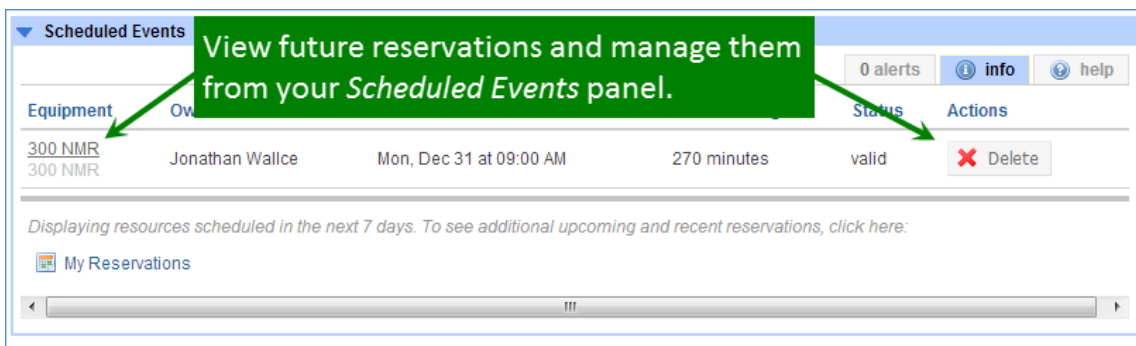
Figure 4. If you have scheduled reservations on any core resource calendars, you will see the Scheduled Events panel. On the Scheduled Events panel you can view future events, click on the resource name to view the calendar, or take specific actions like deleting or cancelling the event.

How do I Schedule Time on Calendars?

To reserve time on calendars, login to the core's web page by following the directions you received in the iLab welcome email, or by using the core's direct link, if core staff has provided you with the link. **Note: The core facility staff has the ability to edit the information seen on their site. The instructions below are general instructions. When you land on the core's page, you may not see exactly the information provided in this manual, but we hope this will guide you through the basic steps.**

When you are logged onto the iLab system on a specific core's site, a *Schedule Equipment* tab may be available next to the *About Our Core* tab (*Figure 5*). When on the *Schedule Equipment* window, the different equipment or resources that the core has available will be listed. To view the calendar, click on the resource name or the *view calendar* button to the right of the name.
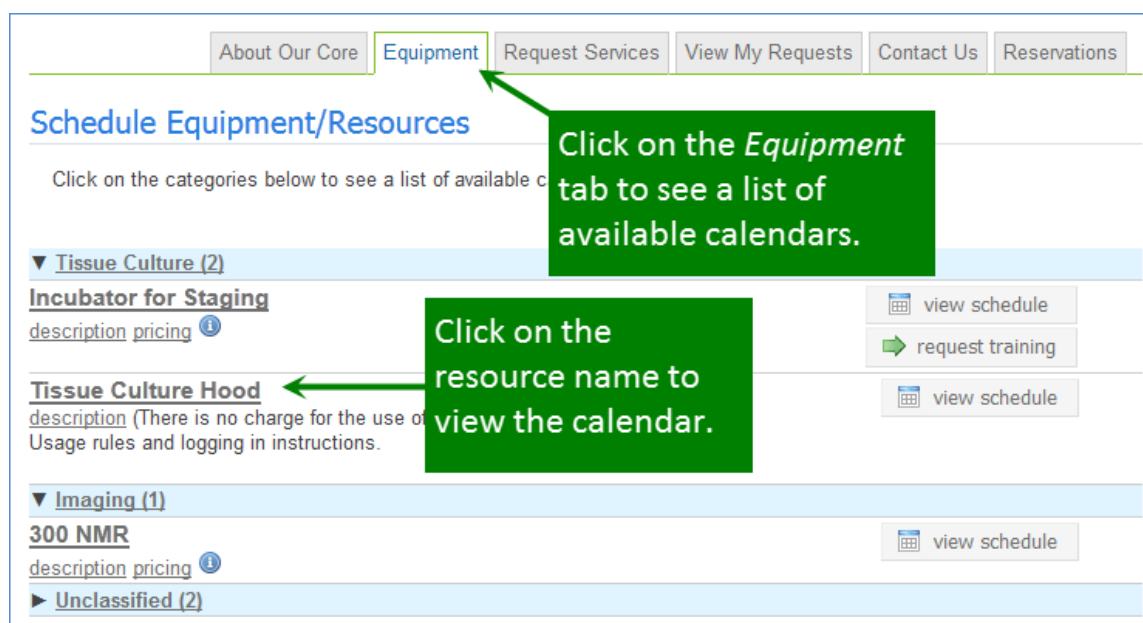
Figure 5. To view a list of calendars click on the *Equipment* or *Scheduling* tab after landing on the core's page.

In the *calendar* several tabs can be accessed (*Figure 5*):

- *Return to Schedules* - to return to the list of facility resources window
- *Schedule* - to view the current schedule for the all of the Resource sets for the listing in the *Multi View*, or the *Day*, *Week* of *Month* of the listing

- *Description* - a description of the equipment
- *Other Schedules*- to view and access other equipment listed and calendars
- *legends & help* – Click on legends and help to view pricing, a calendar color legend and reservation color legend.
- *refresh events* – Click on refresh events to refresh the calendar to see any events created or updated since you last opened the page.
- *other relevant schedules* – Some facilities may have the option to view multiple calendar schedules in one view. To see the reservations on other relevant calendars, click on the *other relevant schedules*, and then choose the other calendars you wish to see.

The color legend for events seen in *Figure 6* is below.

- *Green Events* - Your future reservations
- *Yellow Events* - Your past reservations
- *Gray Events* - Reservations created by other users
- *Red Events* - If the equipment is unavailable for selected amount of time
- *Orange Events* - In some cases, cores require core approval for reservations. If you have reserved time on the calendar that requires core approval, that event will be in orange. When the reservation has been approved you may receive an email and you will see the event turn to green.
- *Purple Events* – When a reservation is approved by the core it will turn purple.

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Figure 6. After you click on the calendar name you will see the resource calendar. You can view multi-instances on the calendar, Day, Week, or Month view. Click and drag on the calendar to make your event reservation.

You can initiate a reservation on the calendar by clicking and dragging on the day and time of the intended usage. A window will pop up that contains information required to create the event under *event details.* A sample form can be viewed in *Figure 7.*

Figure 7. **On the event details window you have information you have to enter before creating your reservation.**

Under *event details* you can (*Figure 7*):

1. Adjust *Availability Type* which may be necessary when cores have different options to choose from like if you require assistance during your usage or not.
2. Choose which resource you want to schedule under *Specify the required resources*.
3. Update the time you scheduled.
4. Provide the payment information you want to use to pay for usage.
5. Sometimes a form is required to fill in to schedule an event. Under *required forms* fields may be provided for you to fill in information.
   a. Required fields are marked by a red star.
6. Action buttons are under the event details. Save the reservation, cancel changes, delete reservations and sometimes the core may allow you to cancel the reservation.
   a. **Note: If you do not click on *Save Reservation*, your reservation will be temporarily saved for 15 minutes. Be sure to click on S*ave Reservation* or *Cancel Changes* before exiting the *event details* window.**
7. The *add a comment* link is provided for comments to be added to the reservation. All comments are logged and can be viewed by anyone that is approved to view the reservation under *comments* at the bottom left of the form.

Note: Depending on the settings determined by the core, you may be able to alter future reservations and sometimes past reservations. In many cases, the core tracks actual usage by a log accessible on the equipment. Please be sure to log in and out on the equipment log so the core can track actual usage correctly.

Note: Some calendars are only available to trained users of the equipment. If you click on *view schedule* **and do not see a calendar, please contact facility staff to inquire about how to gain access to the calendar.**

If you have any questions about the software please contact us at support@ilabsolutions.com.

How do I make Service Requests to Core Facilities?

Core facilities that you work with may also have services that you can request. Please click here to see how to make a service request to the facility.