# iLab Customer Manual

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Registration Process

Internal User (UF Customers)

1. Navigate to https://ufl.corefacilities.org
2. Under the section UF Customers, click the here link to register using your GatorLink username and password.

3. Upon successful authentication, you will be prompted to select your PI/Group from the drop-down menu and provide your phone number.

4. Submit the completed registration form. Upon submission, your PI will receive a notification with your lab membership request.

Questions? Please call 352–273–8030 or email ICBR-iLab@ad.ufl.edu
5. If you do not see your PI/Group in the drop-down menu, please register the lab account first. Click on the link and complete the web form.
6. You will be sent an email with basic instructions on using the system at this time. However, you will not be able to request services or schedule equipment with your new account until your PI has approved your lab membership request.

External User (Non-Profit & Commercial)

1. Navigate to https://ufl.corefacilities.org
2. Under the section Non-UF (Non-Profit & Commercial) Customers, click register link.
3. Complete and submit the registration form. Upon submission the iLab Support will receive a notification with your account request.
4. Once your institution/lab membership has been verified, you will be sent a Welcome Email with login credentials and basic instructions on using the system at this time. However, you will not be able to request services or schedule equipment with your new account until your PI has approved your lab membership request.

My Homepage

Upon initial login to iLab (from institution landing page), you will land on your homepage. Set your account time zone, then click Update my time zone.

On your homepage you can:

1. View messages (communications link)
2. View past and future reservations (my reservations link)
3. View service requests or projects submitted to cores (view requests link)
4. View a list of cores that you can access (list all cores link—more information below)
5. View invoices (invoices link)
6. View details about your lab (my labs link)
   a. If you are a PI or Lab Manager, you can manage your lab(s) with this link.
      i. How to manage lab members:
         1. Click on the my labs link in the left menu to view the Members tab under the lab page.
         2. Under the Lab-wide approval settings heading, the PI, Lab Manager, or Financial Administrator can set a maximum dollar limit individual lab members can use to approve their own requests.
         3. Under the Lab members and settings heading, a list of all lab members is displayed. The PI or lab manager can edit each member’s membership and add members (if they have an existing account in iLab) to your lab by clicking link existing user button.

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ii. How to add funds and assign funds to lab members (internal customers only):

1. Click on the **Membership Requests & PeopleSoft Projects Numbers** tab under the lab page.
2. Under the **Manage PeopleSoft Project Numbers** heading, click on the blue arrow next to **Manually add a new Payment Method**. This will open and provide a field where the PI or Lab manager can type in the chartfield string in the specified format.
3. Click **Add**. The chartfield string will be added under the **Manage PeopleSoft Project Numbers** heading along with a list of the lab members. Check the box to the right of the lab member’s name to assign the chartfield. When the lab member requests services or schedules time on equipment, this chartfield may be selected to charge the service against.

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**Lab-wide approval settings**

- Click the pencil icon next to the person below whom you would like to make the financial approver.

<table>
<thead>
<tr>
<th>Default auto-approval threshold</th>
<th>$5000.00</th>
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<tr>
<td>Cost coverage buffer</td>
<td>$100.00</td>
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### Lab members and settings

<table>
<thead>
<tr>
<th>Name</th>
<th>Auto Approval Amount</th>
<th>Email</th>
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<th>Start Date</th>
<th>End Date</th>
</tr>
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<tbody>
<tr>
<td>Constance Nicklin</td>
<td>Lab default ($5,000.00)</td>
<td><a href="mailto:cnikkin@ufl.edu">cnikkin@ufl.edu</a></td>
<td>(352) 273-8235</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nadia Clark</td>
<td>Lab default ($5,000.00)</td>
<td><a href="mailto:nclark@ufl.edu">nclark@ufl.edu</a></td>
<td>(352) 273-3217</td>
<td></td>
<td></td>
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<tr>
<td>UF Lab Manager</td>
<td>Lab default ($5,000.00)</td>
<td><a href="mailto:uflabmanager@ufl.edu">uflabmanager@ufl.edu</a></td>
<td>(352) 365-3271</td>
<td></td>
<td></td>
</tr>
<tr>
<td>East Quickstar</td>
<td>Lab default ($5,000.00)</td>
<td><a href="mailto:sqz2@ufl.edu">sqz2@ufl.edu</a></td>
<td></td>
<td></td>
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<tr>
<td>ICBR Admin Customer</td>
<td>Lab default ($5,000.00)</td>
<td><a href="mailto:icbrahmin@ufl.edu">icbrahmin@ufl.edu</a></td>
<td>(352) 273-6030</td>
<td></td>
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<tr>
<td>ICBR Cyber Customer</td>
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<td><a href="mailto:icbrcyber@ufl.edu">icbrcyber@ufl.edu</a></td>
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<td>ICBR Prot Customer</td>
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<td>Lab Administrator UP</td>
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<td><a href="mailto:support-sl@telecoms.com">support-sl@telecoms.com</a></td>
<td></td>
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<tr>
<td>Jim Lennon, Test</td>
<td>Lab default ($5,000.00)</td>
<td><a href="mailto:jlemon@ufl.edu">jlemon@ufl.edu</a></td>
<td></td>
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<tr>
<td>Sudi Pall</td>
<td>Lab default ($5,000.00)</td>
<td><a href="mailto:spall@ufl.edu">spall@ufl.edu</a></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>UF Proc Manager</td>
<td>Lab default ($5,000.00)</td>
<td><a href="mailto:uprocessmanager@ufl.edu">uprocessmanager@ufl.edu</a></td>
<td></td>
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<tr>
<td>UF Voucher Issuer</td>
<td>Lab default ($5,000.00)</td>
<td><a href="mailto:uvoucherissuer@ufl.edu">uvoucherissuer@ufl.edu</a></td>
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Questions? Please call 352–273–8030 or email ICBR-iLab@ad.ufl.edu
Accessing ICBR Cores

To access ICBR cores (from your homepage):

1. Click on list all cores under the core facilities heading in the left-hand menu.
2. The List All Cores page will provide a list of cores at the University of Florida (divided by organization) that are available in the system. To navigate to a given core, click on the organization’s name, followed by core’s name.

3. After clicking on the core’s name, you will land on the core’s Request Services tab or Schedule Equipment tab.

Requesting Core Services

1. On the Request Services tab, click the Project category of interest (e.g. Genotyping) to view more information about the project. Click on the request service button to the right of the project request (e.g. Fragment Analysis) to complete and submit the project request form.
2. If you are a member of other labs, a pop-up message will appear; you will be asked to select which lab the request is for.

3. Fill in all of the required fields and save the form. Enter the payment method before submitting the request to the core.
   a. If you do not have any funds assigned (internal customers), your PI/Lab Manager will need to add and assign funds to you in iLab.

4. Click *submit request to core*.

5. The core will review the request, add fees, agree to the request and begin the work. Fees that are added to a request are a projected cost.

6. You will be notified of request status.

7. If you have any questions about the services, fees or forms, please contact the core staff directly. You can click on the *Contact Us* tab to leave a message for the core.

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Scheduling Time on Equipment

1. On the Schedule Equipment tab, you can view the different instruments or resources the core has available.

2. You must be trained on an instrument to view its schedule and make self-service reservations. If you would like to be trained on an instrument, please click the instrument category of interest (e.g. CGRC Instruments) and click the Request Training button to the right of the instrument (e.g. Accuri C6).

3. To create a self-service reservation, click the instrument category of interest (e.g. CGRC Instruments) and click the View Schedule button to the right of the instrument (e.g. Accuri C6).

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4. Locate the date then click and drag on the calendar to schedule time.

5. If you are a member of other labs, a pop-up message will appear; you will be asked to select which lab the request is for.

6. Once the lab is selected (if, applicable), the reservation details will be displayed.

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7. Review your reservation details. The *Scheduled* text boxes can be edited if desired start/end times were not accurately captured.

8. Complete the required form and provide payment information for your request before submitting the request to the core. If you do not have any funds assigned, your PI/Lab Manager will need to assign you funds in the system.

9. After you have completed the reservation details on the form, click the **Save Reservation** button.

10. Your reservation may need to be approved by the core, you can confirm this by viewing your **Home** page (click the **Home** button on the upper left corner of iLab).

**Updating Payment Methods**

If you are the PI, Lab Manager, or Financial Administrator of the lab you can update the payment methods at any time before the request or reservation is completed by the core.

**To update the payment method of a request:**

1. Click on the *view requests* link on your homepage.
2. Click on the **All Requests** tab on the upper-right corner of the screen.
3. Filter for the service request of interest.
4. Click on the green dollar sign on the upper-right corner of the request.

5. A pop up window will appear.

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6. Click the checkbox under the amount column of the charge you would like to update the payment method.
7. Click Save and close the pop up window.

To update the payment method of a reservation:

1. Click on the my reservations link on your homepage.
2. Select the reservation of interest.
3. The reservation’s details window will open.
4. Scroll down to the Payment Information section; update payment method.
5. Click Save Reservation.
Once the request or reservation is completed by the core and invoices are generated, payment methods can be updated on the invoice.

To update the payment method on an invoice:

1. Click on the invoices link on your homepage.
2. Filter for the invoice of interest.
3. Click on the magnifying glass on the upper right hand corner of the invoice.
4. The invoice will open; click on the Select Payment Method link.
5. Update the payment method.
6. Follow the prompts of the pop up window.

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7. Click **Set Payment Method**.