

# 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.

You are about to enter the private network of iLab Solutions, LLC. Unauthorized entry and/or use of this system may subject you to both civil and criminal liability under applicable state and/or federal laws and regulation.

**UF Customers:**  
Click [here](#) to login or register using your University of Florida login and password.

**Non-UF (Non-profit & Commercial) Customers:**  
Login using iLab credentials

If you don't have an account, please [register](#) for an iLab account.

Please email [support@ilabsolutions.com](mailto:support@ilabsolutions.com) if you are experiencing problems with your username and password.

Please call the UF Computing Help Desk at (352) 392-4357 if you need to reset your UF password.

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

**iLab Account Registration**

Hello Marilia Pires,

Welcome to iLab! Please choose your PI or group to get started!  
If you do not see your PI/Group in the drop down list, please [first register the lab account](#).

PI/Group:

First Name:

Last Name:

Email:

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](mailto: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.

### Lab-wide approval settings

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

Default auto-approval threshold

Cost coverage buffer

save approval settings

### Lab members and settings

| Name                                   | Auto Approval Amount     | Email                         | Phone          | Start Date | End Date |  |
|--|--------------------------|-------------------------------|----------------|------------|----------|--|
| <a href="#">Constance Nicklin</a>      | Lab default (\$5,000.00) | cnicklin@ufl.edu              | (352) 273-8026 |            |          |  |
| <a href="#">Nadia Clark</a>            | Lab default (\$5,000.00) | ndclark@ufl.edu               | (352) 273-5217 |            |          |  |
| <a href="#">UF Lab Manager</a>         | Lab default (\$5,000.00) | uflabmanager@ufl.edu          | 352-363-0371   |            |          |  |
| <a href="#">Eoin Quinlivan</a>         | Lab default (\$5,000.00) | epq@ufl.edu                   |                |            |          |  |
| <a href="#">ICBR-Admin Customer</a>    | Lab default (\$5,000.00) | icbradmin@ufl.edu             | 352-273-8030   |            |          |  |
| <a href="#">ICBR-Cyber Customer</a>    | Lab default (\$5,000.00) | icbrcyber@ufl.edu             |                |            |          |  |
| <a href="#">ICBR-Plant Customer</a>    | Lab default (\$5,000.00) | icbrplant@ufl.edu             |                |            |          |  |
| <a href="#">iLab Administrator UFL</a> | Lab default (\$5,000.00) | support+ufl@ilabsolutions.com |                |            |          |  |
| <a href="#">Jim Lennon Test</a>        | Lab default (\$5,000.00) | lennon@ufl.edu                |                |            |          |  |
| <a href="#">Sergiu Pelti</a>           | Lab default (\$5,000.00) | pelti@ufl.edu                 |                |            |          |  |
| <a href="#">Uf Core Manager</a>        | Lab default (\$5,000.00) | ufcoremanager@ufl.edu         |                |            |          |  |
| <a href="#">Uf Institution Admin</a>   | Lab default (\$5,000.00) | ufinstitutionadmin@ufl.edu    |                |            |          |  |
| <a href="#">Uf Voucher Issuer</a>      | Lab default (\$5,000.00) | ufvoucherissuer@ufl.edu       |                |            |          |  |

link existing user

#### 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.

## Membership Requests

✔ No Access Requests require approval

## Manage PeopleSoft Project Numbers

Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

| Name               | Default Payment Method | 11600000-103-2100-CRRNT  | 11600000-213-2200-CRRNT-RPGSUPP-GRANT-00094002-1 | 11600100-101-2200-CRRNT             | 11600100-149-8100-CRRNT             | 11600100-211-2200-CRRNT-0000080-GRANT-0007523E |
|--------------------|------------------------|--------------------------|--|-------------------------------------|-------------------------------------|--|
| Heather Voet       | None                   | <input type="checkbox"/> | <input type="checkbox"/>                         | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>                       |
| Nadia Clark        | None                   | <input type="checkbox"/> | <input checked="" type="checkbox"/>              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/>            |
| UF Lab Manager     | None                   | <input type="checkbox"/> | <input checked="" type="checkbox"/>              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/>            |
| Ambar Meja         | None                   | <input type="checkbox"/> | <input type="checkbox"/>                         | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>                       |
| Christopher Dillon | None                   | <input type="checkbox"/> | <input type="checkbox"/>                         | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>                       |

▶ Manually add a new Payment Method

▶ Manage PeopleSoft Project Numbers

# 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.

Cores at my institutions

Search for cores (cores at internal institution)  Clear

▼ Cores at University of Florida

▼ Cores at ICBR

| Core Name                           | Primary Contact | Email            | Phone Number/Ext |
|-------------------------------------|-----------------|------------------|------------------|
| ICBR Bioinformatics                 | William Farmene | wf2@ufl.edu      | (352) 273-8049   |
| ICBR Cytometry                      | Neal Bemson     | nbemson@ufl.edu  | (352) 273-9186   |
| ICBR Electron Microscopy            | Qiu-Xing Jiang  | qxjiang@ufl.edu  | (352) 392-1184   |
| ICBR Gene Expression & Genotyping   | Yanping Zhang   | yanp@ufl.edu     | (352) 273-8043   |
| ICBR Monoclonal Antibody            | Linda Green     | lgreen@ufl.edu   | (352) 273-8039   |
| ICBR NextGen DNA Sequencing         | David Moraga    | moraga@ufl.edu   | (352) 273-8053   |
| ICBR Proteomics & Mass Spectrometry | Sixue Chen      | schen@ufl.edu    | (352) 273-8057   |
| ICBR Sanger Sequencing              | Santa Shanker   | sshanker@ufl.edu | (352) 273-8056   |

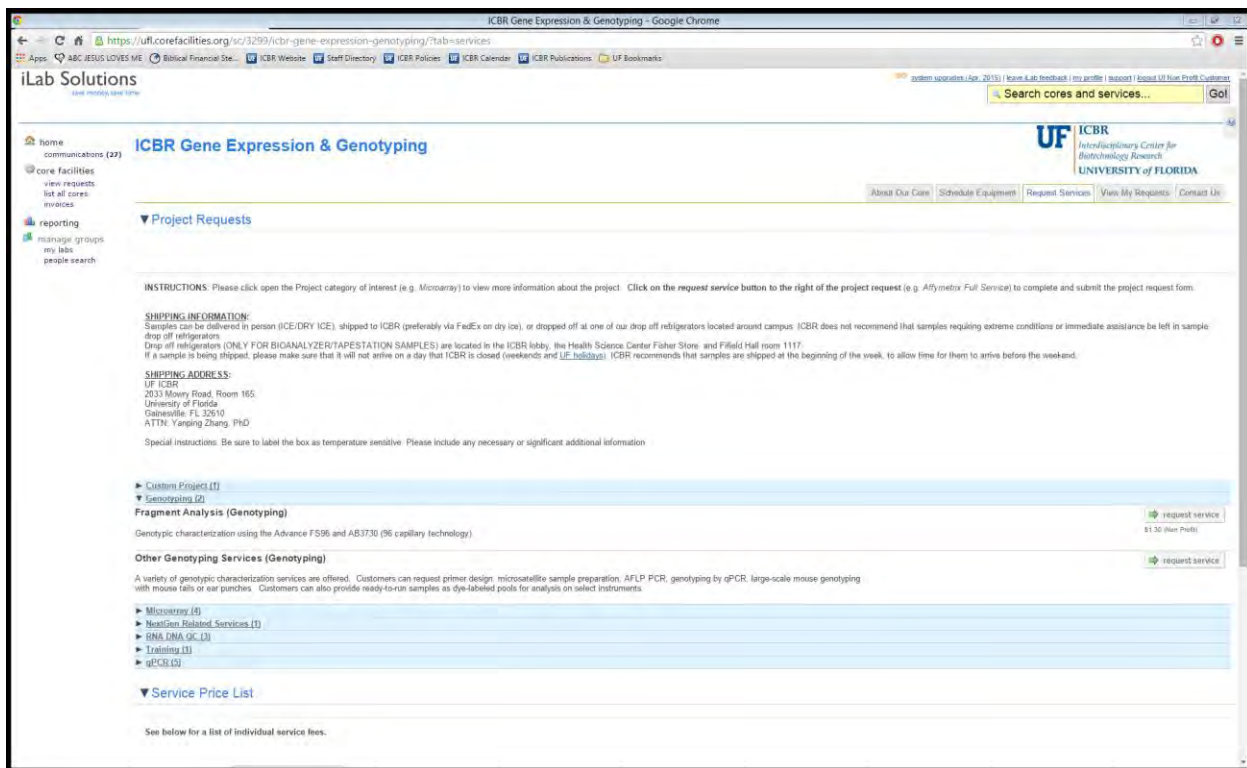
▶ Cores at SECM

▶ Other cores

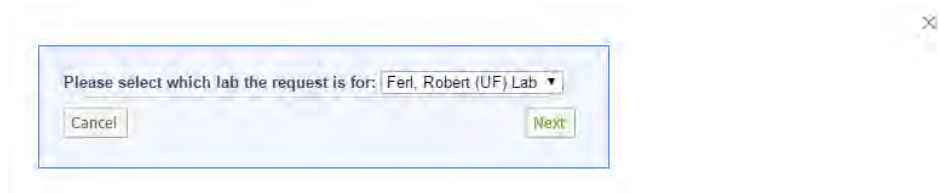
3. After clicking on the core's name, you will land on the core's *Request Services* tab or *Schedule Equipment* tab.

# 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.

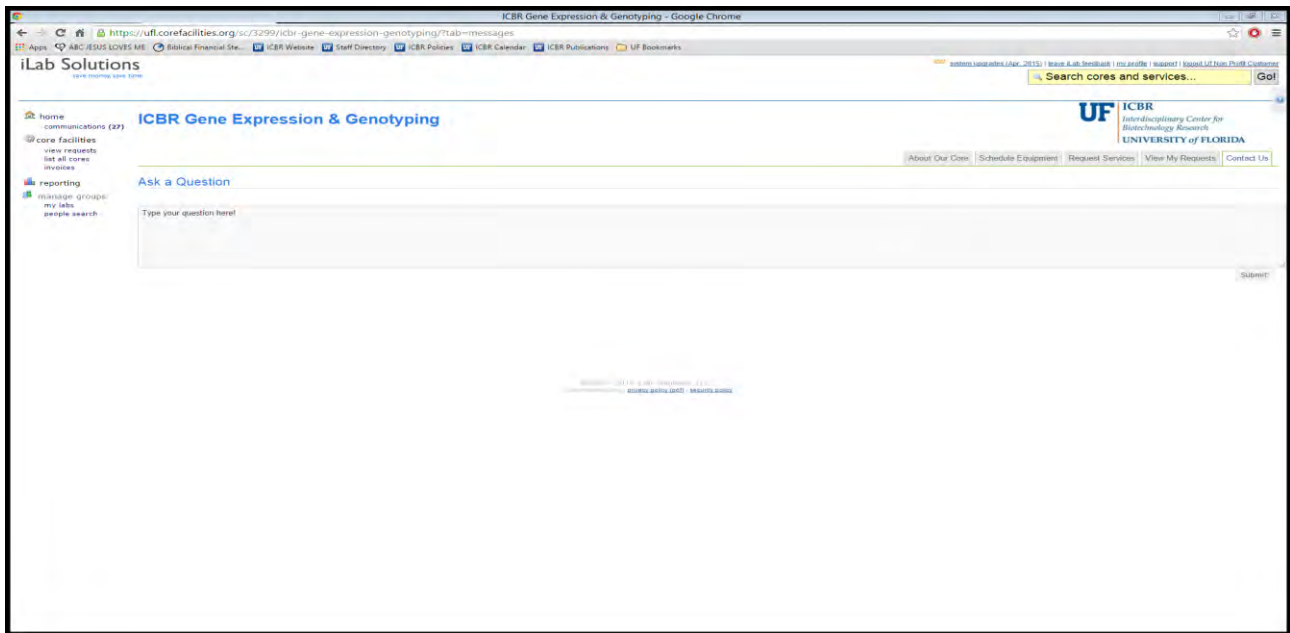


2. If you are a member of other labs, a pop-up message will appear; you will be asked to select which lab the request is for.



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.

Questions? Please call 352-273-8030 or email ICBR-iLab@ad.ufl.edu



## Scheduling Time on Equipment

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

**ICBR Cytometry**

UF Interdisciplinary Center for Biotechnology Research UNIVERSITY of FLORIDA

About Our Core **Schedule Equipment** Request Services View My Requests Contact Us

### Schedule Equipment

We are located in two sites on the UF campus:

- Cancer & Genetics Research Complex (CGRC), 2nd Floor Room, 292.
- McKnight Brain Institute (MBI), 3rd Floor, Room L3-160.

**INSTRUCTIONS:**

- 1). 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 open 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*).
- 2). To create a self service reservation, click open 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*). Locate the date then click and drag on the calendar to schedule time.

▶ **CGRC Instruments (6)**

▶ **MBI Instruments (3)**

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*).

Questions? Please call 352-273-8030 or email [ICBR-iLab@ad.ufl.edu](mailto:ICBR-iLab@ad.ufl.edu)

▼ CGRC Instruments (6)

**Sony SH800 Cell Sorter**

[description](#) [pricing](#)

This instrument is equipped with 3 lasers and 6 fluorescence detectors. It is capable of exciting fluorescent dyes in the violet, blue and red regions of the spectrum. Emission options run from the blue to the far red. (New users should first discuss their plans with a staff member to get feasibility details.) It can sort cells at rates of up to 10,000 per second, and offers 2-way sorting into tubes. This instrument is available for training and subsequent self-service use.

[view schedule](#)

[request training](#)

**Accuri C6 (CGRC)**

[description](#) [pricing](#)

This instrument is for analysis only and has 2 lasers (blue and red) with 4 fluorescence detectors (green, yellow-orange, red from blue laser, and red from red laser). This instrument uses CyFlow Plus (Windows Vista).

[view schedule](#)

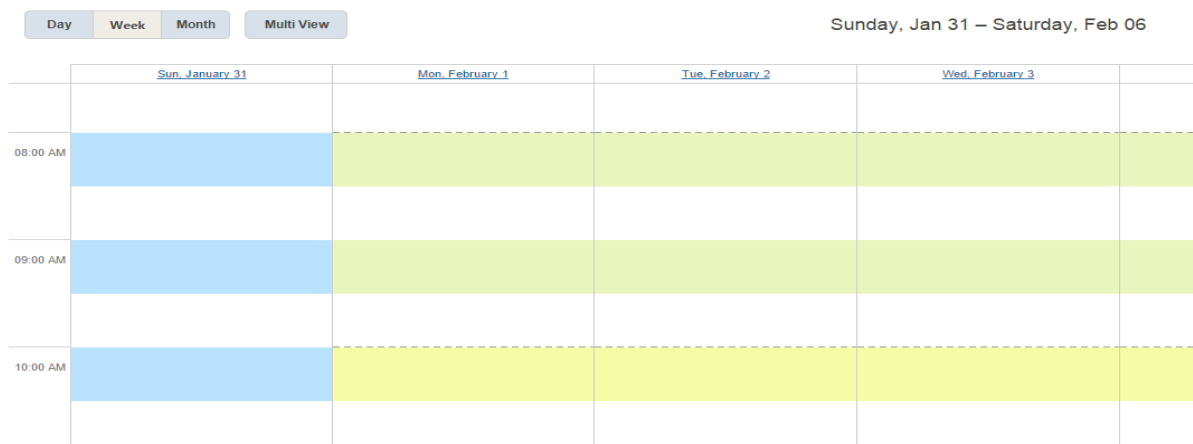
[request training](#)



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

Accuri C6 (CGRC) (ICBR Cytometry)

Please click and drag on the calendar below to schedule time. This calendar is in (GMT-05:00) Eastern Time (US & Canada)



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.



**Reservation details** ⚠ **Unsaved reservation - click save reservation**

For: Sony SH800 - Self Service \$54.00/hr (trained users) - My Reservation  
 Lab: Test (UFL) Lab  
 Created on: March 23, 2015 15:07

A 2-hr minimum charge will apply.  
 Scheduled: 03/26/2015 8:00AM - 03/26/2015 9:00AM

Event Notes:  note visible to anyone

**Use and cost of reservation**  
 Customers must supply their UFID number to ICBR Flow Cytometry for after-hours access to the building and the core facility.

Mar 26 '15 08:00 - 09:00 Self Service \$54.00/hr

Total: \$54.0 (1.0 hours)

**Payment information:**  
 Please enter the Payment Method

**Payment Method**

| %      | Payment Method...        |
|--------|--------------------------|
| 100.0% | Select Payment Method... |
| 100.0% | total allocated          |

**Service Project**

Assign to an ongoing project of the same researcher:  Select existing project

**Invite additional people to this event by email**

Please enter a comma separated list of valid email addresses

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.

#### All Service Requests

◀ Hide Filters

| Keywords   | Displaying 1 out of 1 result. (Page 1 of 1) |                                       |             |                   |                      |          |
|--|---|---------------------------------------|-------------|-------------------|----------------------|----------|
| ICBR-EM-107  | date  | for                                   | service id  | status            | cost                 | vouchers |
| <input type="text" value="ICBR-EM-107"/> <input type="button" value="Go"/> | May 01<br>(May 27 2016)                     | Nadia Clark<br>Voet, Heather (UF) Lab | ICBR-EM-107 | Equipment Charges | \$0.00<br>(\$100.00) | \$0.00   |

▼ Status  
 Equipment Scheduling (1)

▶ Category

5. A pop up window will appear.

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

Displaying 1 out of 1 result. (Page 1 of 1)

| date   | for                             | service id   | status                 | cost                             | vouchers  |
|--|---------------------------------|--|------------------------|----------------------------------|---|
| May 01<br>(May 27 2016)  | Nadia Clark<br>Voet, Heather (U |  |                        |                                  |   |
|  |                                 | <b>charge</b>  | <b>billing status</b>  | <b>payment type</b>              | <b>amount</b>   |
|  |                                 | Hitachi SU5000 Schottky Field-Emission SEM (Hitachi SU5000 Schottky Field-Emission SEM)   Friday, May 27 | Billing<br>Initialized | 11600200-101-2200-<br>CRRNT----- | \$40.00 <input type="checkbox"/>  |
|  |                                 | ICBR Staff Assistance  | Billing<br>Initialized | 11600200-101-2200-<br>CRRNT----- | \$60.00 <input type="checkbox"/>  |
|  |                                 |  |                        |                                  | <b>selected charge(s) total: \$0.00</b>                                   |
|  |                                 |  |                        |                                  | Amount currently due: \$0.00  |
| ▼ Update payment info for selected (0) charges   |                                 |  |                        |                                  |   |
| Payment Method <input type="text" value="Payment Method"/> 11600200-101-2200-CRRNT----- <input type="button" value="v"/> |                                 |  |                        |                                  |   |
| <input checked="" type="checkbox"/> make default for project?  |                                 |  |                        |                                  |   |
| payment notes <input type="text"/>   |                                 |  |                        |                                  |   |
|  |                                 |  |                        |                                  | <input type="button" value="save"/> <input type="button" value="cancel"/> |
| ▶ Send Payment Reminder?   |                                 |  |                        |                                  |   |

### To update the payment method of a reservation:

- Click on the *my reservations* link on your homepage.
- Select the reservation of interest.
- The reservation's details window will open.
- Scroll down to the Payment Information section; update payment method.
- Click **Save Reservation**.

#### Reservation details

**For:** Leica TCS-SP5 - Self Service (business hours) \$50.00/hr (trained users) - My Reservation  
**Lab:** [Ferl, Robert \(UF\) Lab](#)  
**Created on:** May 27, 2016 13:48

**Event Notes:**

#### Times

**Scheduled:**   -

#### Use and cost of reservation

**Customers must supply their UFID number to ICBR Flow Cytometry for after-hours access to the building and the core facility.**

**Total:** **\$75.0** (1.5 hours)

#### Additional charges for this event

|  |                    |                |            | Quantity: | Unit price: | Total: |  |
|--|--------------------|----------------|------------|-----------|-------------|--------|--|
|  | May 27<br>01:51 PM | UF Lab Manager | Fluorodish | 1.0       | \$2.00      | \$2.00 |  |
|  | May 27<br>01:51 PM | UF Lab Manager | Fluorodish | 1.0       | \$2.00      | \$2.00 |  |
|  | May 27<br>01:51 PM | UF Lab Manager | Fluorodish | 1.0       | \$2.00      | \$2.00 |  |

#### Payment information:

Please select the payment method:

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.

**Invoices**

ICBR-EM-656038

Get PDF of Invoices Download Results as CSV

Displaying 1 out of 1 result(s). (Page 1 of 1)

| Created On | Core                     | Invoice Number | Lab                    | Owner       | Payment Numbers              | Price Types | Total Cost | Past Due    | Status       | Approval Status |
|------------|--------------------------|----------------|------------------------|-------------|------------------------------|-------------|------------|-------------|--------------|-----------------|
| May 26 '16 | ICBR Electron Microscopy | ICBR-EM-656038 | Voet, Heather (UF) Lab | Nadia Clark | 11600200-101-2200-CRRNT----- | Uf          | \$1.00     | 0 - 30 days | Not Yet Paid | not required    |

4. The invoice will open; click on the *Select Payment Method* link.



PO Box 103622  
2033 Mowry Road  
Gainesville, FL 32610

Customers should initiate a dispute if there are any questions or concerns regarding charges on this invoice. To start the dispute process, hover over an individual charge to view an orange flag. Click on the orange flag. A pop-up window will appear, with a drop down list of possible dispute reasons. Select an appropriate reason and click *Initiate Dispute*.

Invoice No. **ICBR-EM-656038**  
 Invoice Date **May 26, 2016**  
 Lab **Voet, Heather (UF) Lab**

From: ICBR Electron Microscopy To: Voet, Heather (UF) Lab | Nadia Clark

[show additional contacts](#)

**Invoice Total**

**\$1.00**

[Select Payment Method](#)

**Invoice Summary**


Payment Number **11600200-101-2200-CRRNT-----**  
 Invoice Totals **\$1.00**

| Invoice Details   |   |                              |     |           |           |                      |
|---|---|------------------------------|-----|-----------|-----------|----------------------|
| DATE  | ITEM DESCRIPTION                            | PMT.#                        | QTY | PPU       | STATUS    | TOTAL                |
| Request: ICBR-EM-104 Start: May 26, 2016 Owner: Nadia Clark |   |                              |     |           |           |                      |
| (6030379) May 26, 2016                                      | EM-306, Consumables and supplies (per unit) | 11600200-101-2200-CRRNT----- | 1.0 | \$1.00/ea | Completed | \$1.00               |
|   |   |                              |     |           |           | Invoice cost: \$1.00 |

5. Update the payment method.
6. Follow the prompts of the pop up window.

Step 1: Select payment method X

---

Select Payment Method 

**Help**  
You can choose to pay this invoice by one payment method provided in the dropdown in Step 1. Either choose to pay all charges on the invoice, or charges that are missing payment information in Step 2. Enter any additional information that may be required in step 3. If you do not want to pay the invoice by one payment method, close this window and click on the dollar sign icon across for each Request ID and update payment information for each charge.

7. Click *Set Payment Method*.