# Table of Contents

Overview ............................................................................................................................................................................................... 2
Step-by-Step Instructions to Register for an iLab Account with UA NetID ................................................................. 2
Step-by-Step Instructions for External Customers to Register for an iLab Account ........................................... 3
   In-Person Assistance is Available ........................................................................................................................................... 5
Instructions Specifically for PIs and Lab Managers ............................................................................................................. 6
   Logging In ........................................................................................................................................................................................ 6
   Navigating to Your Lab Group Page ...................................................................................................................................... 7
   Approving Lab Membership Requests ................................................................................................................................. 8
   Adding Lab Members (who already have iLab accounts) ............................................................................................. 8
   Adjusting Auto-Approval Financial Thresholds for Your Entire Lab ........................................................................... 9
   Adding UAccess Financial Accounts to Your Lab Group ............................................................................................ 9
   Granting UAccess Financial Account Access to Lab Members .................................................................................. 10
Information for All Users .............................................................................................................................................................. 11
   How-To Video for General User Processes ....................................................................................................................... 11
   Creating an Equipment Reservation ................................................................................................................................... 11
   Creating a Service Request ..................................................................................................................................................... 11
Additional Help ................................................................................................................................................................................ 12
Overview
As of December 1, 2017 RDI is excited to begin using iLab in the first of its cores to go-live. iLab is an online system to streamline the process of ordering services and scheduling instrumentation within core facilities. Many of RDI’s cores are already utilizing this new system, with many more from RDI and other units across campus to follow in 2018 and beyond.

Users of these facilities are advised to familiarize themselves with the new system, which requires a one-time free registration, as described below. If you are a named PI on a current Sponsored Project Account in UAccess Financials you have already been registered for an iLab account. Even if you do not use any of the facilities not currently in the system, you may want to get your financial accounts and research group members setup in iLab now so you will be ready to access the services and instrumentation of facilities you use once they are live in the system.

Step-by-Step Instructions to Register for an iLab Account with UA NetID
1. Navigate to the login page and click on the green “Login” button at the top right of the screen.

2. In the pop up click the “here” hyperlink.

3. You will be directed to the WebAuth page where you will need to enter your NetID credentials and click the LOGIN button.
4. If you are setup for two-factor authentication you will need to provide authentication via the Duo-Mobile application.

You will bypass steps 3 and 4 if you are already logged into a U of A system via WebAuth.

5. If you do not already have an account you will be directed to an iLab Registration page where you will need to select your PI/Lab, and verify your contact information. You can be added to additional PI’s labs later, as necessary.

6. Once your registration has been submitted, your PI will receive a notification that you have requested membership to their lab within iLab. They will need to approve your membership and assign at least one financial account for you to be able to request services or schedule time on instrumentation.

The first time you login to iLab after being accepted into your PI’s lab you will need to set your time zone. Please set this as Arizona so that you are in sync with the equipment calendars. You will also have the opportunity to set your preferred email address for messages from this system. Once you have set these as appropriate click the ‘Set’ button. The changes will be registered to your account the next time you log out and log back in.

Step-by-Step Instructions for External Customers to Register for an iLab Account

1. Navigate to the login page and click on the green “Login” button at the top right of the screen.
2. In the pop up click the “register” hyperlink.

3. Complete the registration form that you are directed to.
4. You will receive a *Welcome Email* containing the login credentials for your new iLab account, typically within one business day.

The first time you login to iLab after having your account setup you will need to set your time zone. Please set this as Arizona so that you are in sync with the equipment calendars. You will also have the opportunity to set your preferred email address for messages from this system. Once you have set these as appropriate click the ‘Set’ button. The changes will be registered to your account the next time you log out and log back in.

**In-Person Assistance is Available**

In order to help familiarize people with the new system, an open house will be hosted by RDI in [Building] [Room] on [Date] from [Time] until [Time]. Please feel free to stop by to get help with registration, joining a Lab, managing your Lab and learning to schedule equipment or request services. More of these open houses will be hosted in the weeks and months to come. Announcements with time, date and location information for these events will be sent out via as many channels as possible. You can also contact Noah Curtis at (520) 621-1085 or nbcurtis@email.arizona.edu for a personal tutorial.
Instructions Specifically for PIs and Lab Managers

As a PI you may have researchers (i.e. Users) who use instrumentation or services from Core Facilities. If so, you will need to learn how to manage your lab group in iLab. Your lab group is a construct of Users and UAccess Financials Accounts. As PI you have the capacity to approve or deny Users' requests to be part of your lab group, allocate those Users access to some or all of the Financial Accounts that belong to your lab group, and request access to UAccess Financial Accounts that are not placed into your lab group by default. If you would prefer to delegate these responsibilities to a lab manager, please email ilab-support@agilent.com or nbcurtis@email.arizona.edu with your lab manager’s name & email address.

Getting your lab group established in iLab can take time, especially if you have non-sponsored UAccess Financials Accounts that will need to be added to your lab group. We recommend that you begin this process immediately, even if the facility or facilities you regularly use are not yet using iLab. Having your lab group established ahead of time will enable you to access those facilities without interruption once they are integrated into the system, and will give you more time to familiarize yourself and your team with the iLab environment.

Logging In

1. Navigate to the login page and click on the green “Login” button at the top right of the screen.

2. In the pop up click the “here” hyperlink.
3. You will be directed to the WebAuth page where you will need to enter your NetID credentials and click the ‘LOGIN’ button.

4. If you are setup for two-factor authentication you will need to provide authentication via the Duo-Mobile application.

You will bypass steps 3 and 4 if you are already logged into a U of A system via WebAuth.

On initial login, you will be asked to set your time zone. Please set this as Arizona so that you are in sync with the equipment calendars, and then click ‘Set.’ The change will be registered to your account the next time you log out and log back in.

Navigating to Your Lab Group Page

1. Once logged in (see instructions above), look for the link in the left-hand menu that says ‘my groups.’ Hover over this link, and then select your lab, or simply click the ‘my groups’ link and then click the link for the lab group you want to manage.

2. The default tab you will land on when you navigate to your lab group’s page is the ‘Members’ tab. The various functions you will need to perform as PI can be performed via tools in the tabs seen in the screenshot below.
Approving Lab Membership Requests

1. Log in and navigate to your lab group’s page (see instructions above).

2. Click on the “Membership Requests & Account Numbers’ tab. Membership requests will show at the top of this page, under the ‘Membership Requests’ section.

3. Click ‘Accept’ if the individual requesting membership belongs to your lab group. Click ‘Reject,’ if the individual does not belong to your lab group.

Adding Lab Members (who already have iLab accounts)

1. Log in and navigate to the “Members’ tab within your lab group’s page (see instructions above).

2. Within the ‘Lab members and settings’ section click on the ‘link existing user’ button and search for the user you wish to add.

   Note: Names within iLab are driven by NetID values, and frequently include middle initials or middle names. If you are unable to find an individual in iLab you can use the directory within Outlook to help determine the person’s official name in the NetID database.

3. Click on the name of the individual you wish to add from the results of your search.
4. Select the membership role you wish to assign this individual from the dropdown menu (i.e. member, manager or principal_investigator).

5. Set a ‘Start Date’ if you wish to provision the individual for a future date.

6. Set an ‘End Date’ if you wish to provision the individual until a specific future date.

7. Click the ‘Invite’ button.

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**Lab members and settings**

<table>
<thead>
<tr>
<th>Name</th>
<th>Auto Approval Amount</th>
<th>ERP ID</th>
<th>Email</th>
</tr>
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<tbody>
<tr>
<td>Erik Knudsen</td>
<td>Lab default ($500.00)</td>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

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**Add an existing user**

Select the appropriate role for the user (e.g., member, manager, principal_investigator) and set any start and end dates as necessary. Click the ‘Invite’ button.

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**Adjusting Auto-Approval Financial Thresholds for Your Entire Lab**

1. Log in and navigate to your lab group’s page (see instructions above).

2. You will land on the ‘Members’ tab, which is where you will adjust this value.

3. In the ‘Lab-wide approval settings’ section you can set a ‘Default auto-approval threshold’ dollar amount in the system. Charges incurred by your lab members that are below this threshold will not require your explicit approval. Charges above this amount will be routed to a financial approver for their approval.

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**Adding UAccess Financial Accounts to Your Lab Group**

1. Log in and navigate to the ‘Membership Request & Account Numbers’ tab of your lab group’s page (see instructions above).

2. Open the third section down on this tab titled ‘Request access to additional Account Numbers.’
3. Type the UAccess Financials account number, or account number-subaccount number (concatenate these values via a single dash) into the box and then click the 'Request' button.

4. An authorization request will be sent to the Fiscal Officer (non-sponsored projects accounts), or to the PI on the account (sponsored projects accounts).

5. Once approved by the Fiscal Officer or PI named on the UAccess Financials account, the members of the lab group will need to be granted access to use the new account (see below).

Granting UAccess Financial Account Access to Lab Members

1. Navigate to the 'Membership Requests & Account Number(s)' tab (see above).
2. Find the member in the list under ‘Manage Account Number(s)’ section.
3. Select the checkbox(es) to the right of their name for the financial account number(s) you wish to permit them to use.

Note: Your lab members will not be able to create equipment reservations or create service requests without having accounts assigned to them.

Tip: If you hover your mouse over an account number in the grid the system will display the account name, award number and expiration date for that account.
Information for All Users

Whether or not you are a PI you will need to know how to reserve equipment and request services within the new system. The following sections provide step-by-step instructions on these processes in a number of forms.

How-To Video for General User Processes
If you would like to watch a video that walks you through the processes of reserving equipment and requesting services you can do so here.

Creating an Equipment Reservation
Once you have been accepted into your PI’s lab and assigned an Account Number, you can schedule equipment time.

1. Login to iLab (see instructions above).
2. Navigate to the core that houses the equipment you wish to schedule.
3. Select the Schedule Equipment tab, and click on the ‘View Schedule’ button next to the instrument of interest. Click and drag on the time frame for your reservation.
4. A window will pop up that will allow you to verify your reservation details and provide payment information before saving the reservation.

Creating a Service Request
Once you have been accepted into your PI’s lab and assigned an Account Number, you can create service requests.

1. Login to iLab (see instructions above).
2. Navigate to the core that provides the services you wish to request.

3. Select the Request Services tab, and click on the ‘Request Service’ button next to the service of interest.

4. You will be asked to complete a form and provide a financial account number before submitting the request to the core.

5. Your request will be pending review by the core. The core will review your request and either Agree to the work or they will ask for more information if needed.

Additional Help
More detailed instructions can be found by clicking on the “HELP” link in the upper right hand corner from within iLab and selecting “Access to iLab’s Help Site” or by navigating here. For any questions not addressed in the Help Site, click on the “HELP” link in the upper right hand corner and submit a ticket or contact ilab-support@agilent.com. These are 24/7 resources available to assist you with any issues you may encounter in the new system.

You can also reach out to Noah Curtis at nbcurtis@email.arizona.edu or (520) 621-1085 for on-campus support.

Sincerely,

The University of Arizona – iLab Team