iLab User Guide

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Quick Intro

iLab, a cloud service provided by Agilent Technologies, serves as the centralized platform for managing the life cycle of service requests made by PIs and researchers. It allows user to initiate a service request of any service being provided by CPOS (except Imaging, Cytometry, Bio-reagent and Oligo ordering services). It keeps track of a service from the beginning until invoices are paid.

This guide will walk you through how a service request is made, approved, processed, and invoiced.

Terminology

Core/Core Facility in iLab = CPOS (excluding Imaging, Cytometry, Bio-reagent and Oligo ordering) Lab/Group

in iLab = PI group

Lab Member/Researcher = User/Researcher/Customer

Core Manager = Lab Manager

Core Member = Lab Technician (who processes a request)

Request Approval Workflow

Once the request is successfully submitted by the PI/User, it will follow the approval workflow below:



Benefits of using iLab

1. Online system available 24 x 7 and can be accessed anywhere on the internet
2. Real-time check on status of all service requests raised in your group
3. Online invoices with simplified payment process
4. Paperless

What you can do with iLab

1. Make a service request anytime to our Centre
2. Set a pre-approved dollar value limit for the entire PI group or individually
3. View status the requests made
4. Change billing account number anytime before invoice is generated and split a service charge into multiple billing account numbers by percentage (not by actual value).
5. View invoices online when they are generated
6. Communicate with the Centre

What you need to do as a PI

1. Approve service request financially
2. Set/Change Auto Approval Amount for individual user of your group (Do NOT change the Lab-wide values)
3. Change billing account number, if necessary, before invoice generation
4. View and confirm invoices for payment
5. Add or remove users/researchers in your group

Assigning a manager (proxy)

You can assign a **manager** (proxy) to handle daily operation on your behalf. See “How to authorize a Lab/Group Manager for your group” on page 33 for details.

Account Registration and Creation – you only need to do this once

1. Once we begin registering a new account for you, you will first receive an email from support@ilabsolutions.com with the Subject: NOTIFICATION: Account request received, like below. There is nothing you need to do but wait for the next email.

From: support@ilabsolutions.com [mailto:support@ilabsolutions.com]
Sent: Thursday, August 1, 2019 1:59 PM
To: <*your_name*> <your_email@hku.hk>
Subject: NOTIFICATION: Account request received

Your account request is awaiting confirmation.

Thank you for requesting an iLab account. **Please allow up to 24 hours for account confirmation**.

Next, our team will...

1. ...review the account information that you provided.
2. ...confirm the provided information with your Principal Investigator and/or a Financial Contact.
3. ...send your account credentials to the email address provided during registration.

If you have any additional questions about your account status, do not hesitate to send us an email at ilab-support@agilent.com. Alternatively, you can call us at 617-297-2805.

Please feel free to contact ilab-support@agilent.com if you have any problems accessing or approving your request.

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2. Within 24 hours (usually within a couple of hours), you shall receive another email confirming the account has been registered, like below:

From: support@ilabsolutions.com [mailto:support@ilabsolutions.com]
Sent: Thursday, August 1, 2019 6:48 PM
To: <your_name> <your_email@hku.hk>
Subject: iLab - account information

Agilent CrossLab

<Your Name> - Welcome to iLab!

Thank you for registering for an iLab account. Please use the information below to help you get started. Feel free to contact ilabsupport@agilent.com with any questions.
Best wishes,
The iLab team

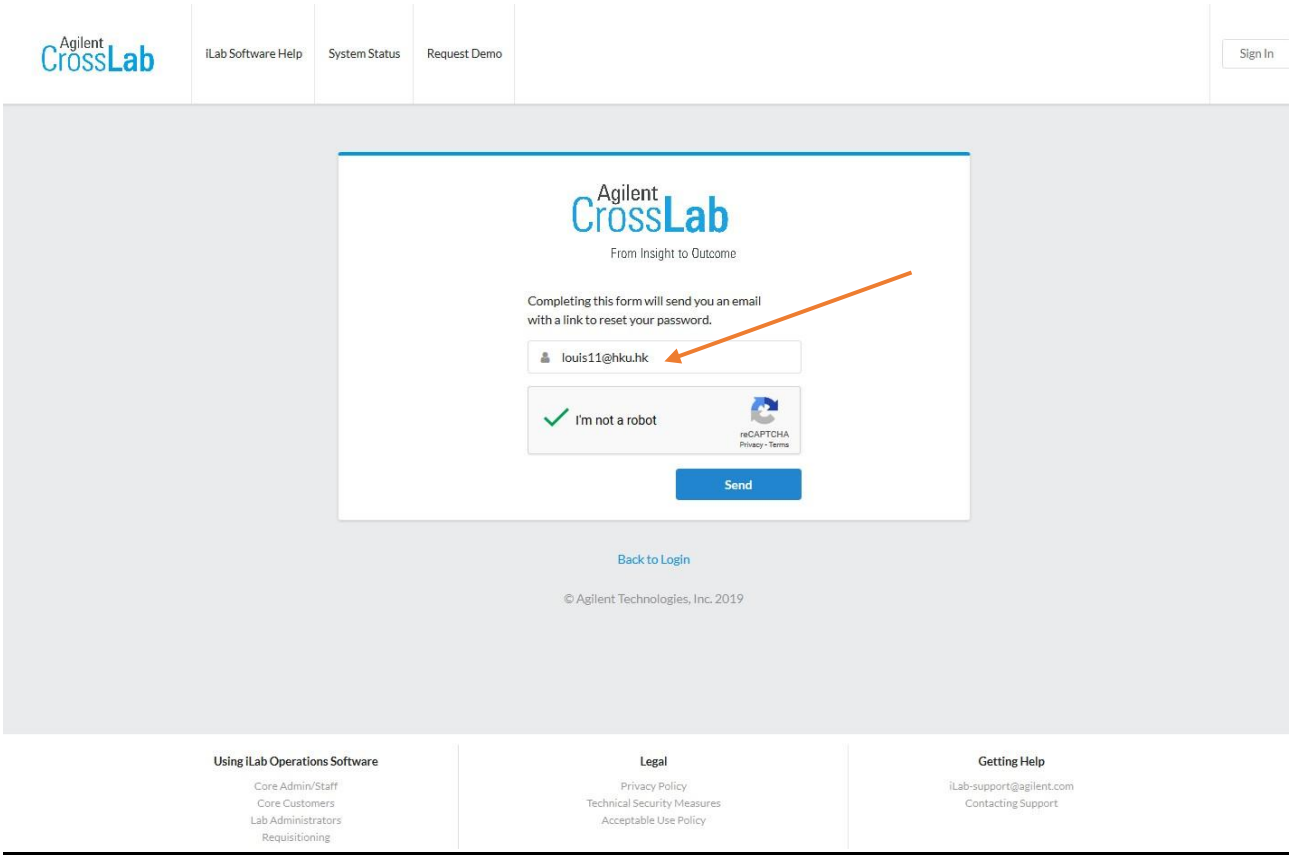
Getting started

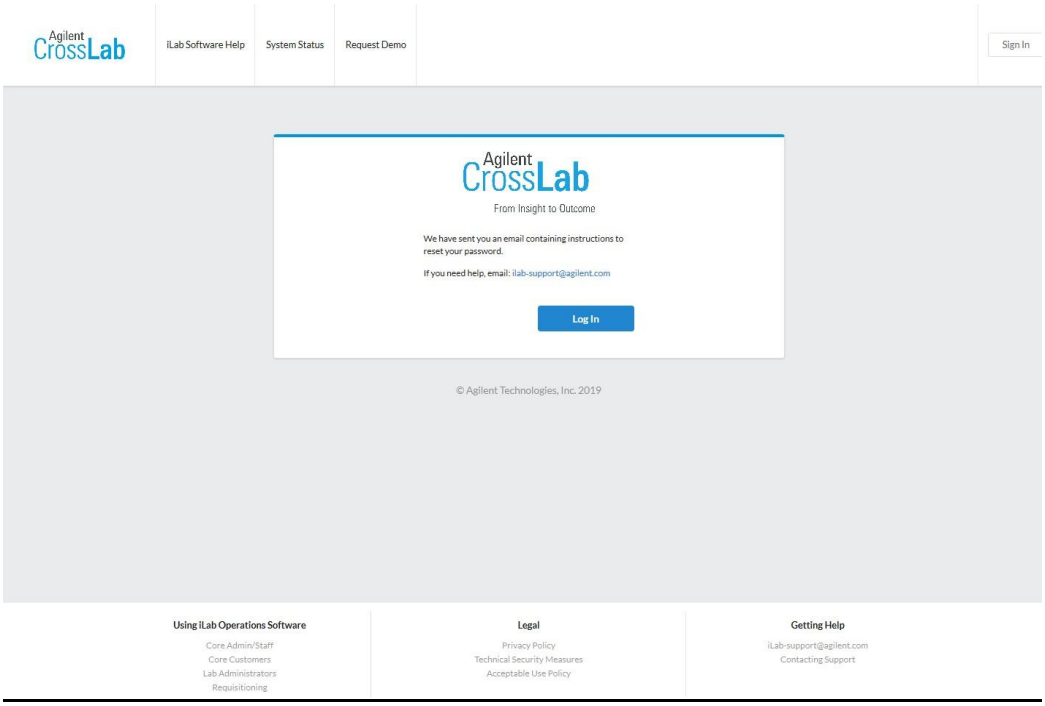
1. Click here to retrieve your password and view available cores.
2. Click on the core facilities link in the left hand menu: cores
3. Select a core from the list of cores (You requested access to: Li Ka Shing Faculty of Medicine Centre for PanorOmic Sciences)
4. On the core's page, click the 'about' tab to learn more about the available services.
5. To request services, click the 'request services' tab.
6. For cores with equipment, click on the 'schedule equipment' tab.

Click on 'HELP' at the upper right of the iLab application to submit a support ticket or access online help articles.

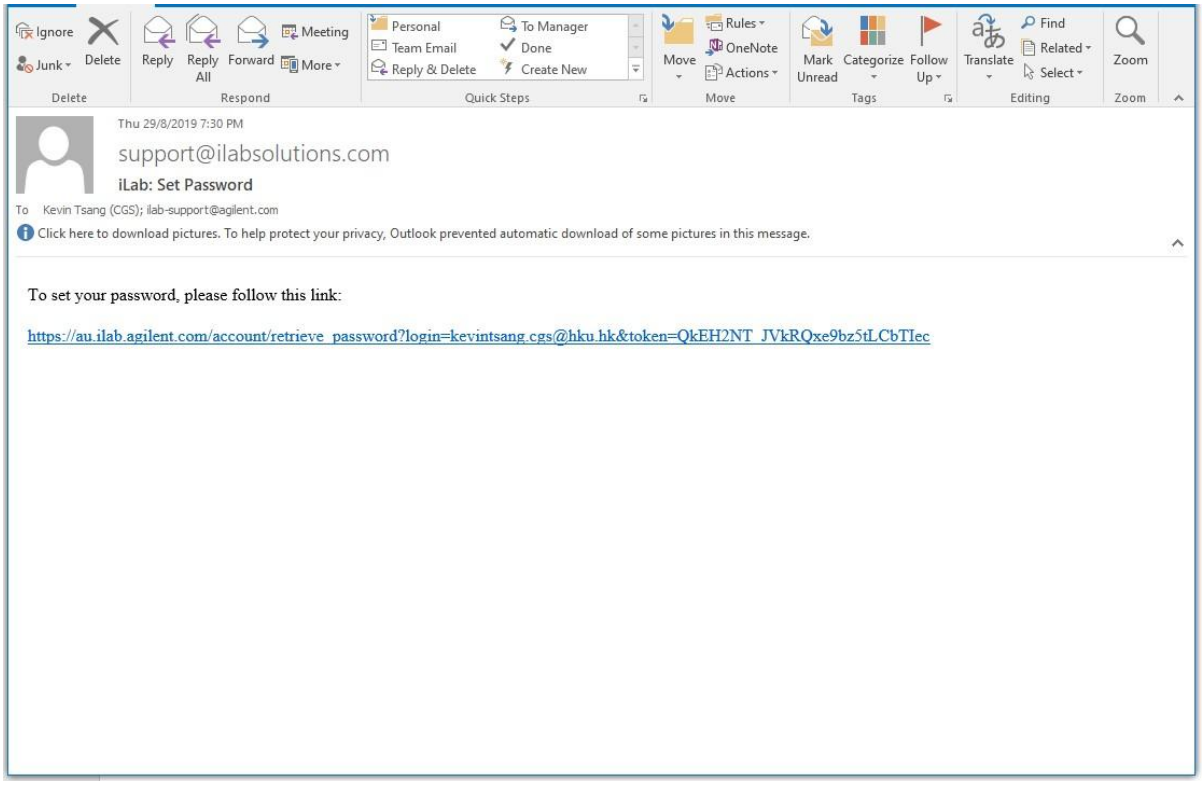
3. When you receive the above email, please click “here” (as shown above with the arrow) to retrieve your password.

4. You will then be directed to the following webpage to retrieve and reset your password. Enter your email address (must be the same as the one you see in the previous emails) and click “Send”.

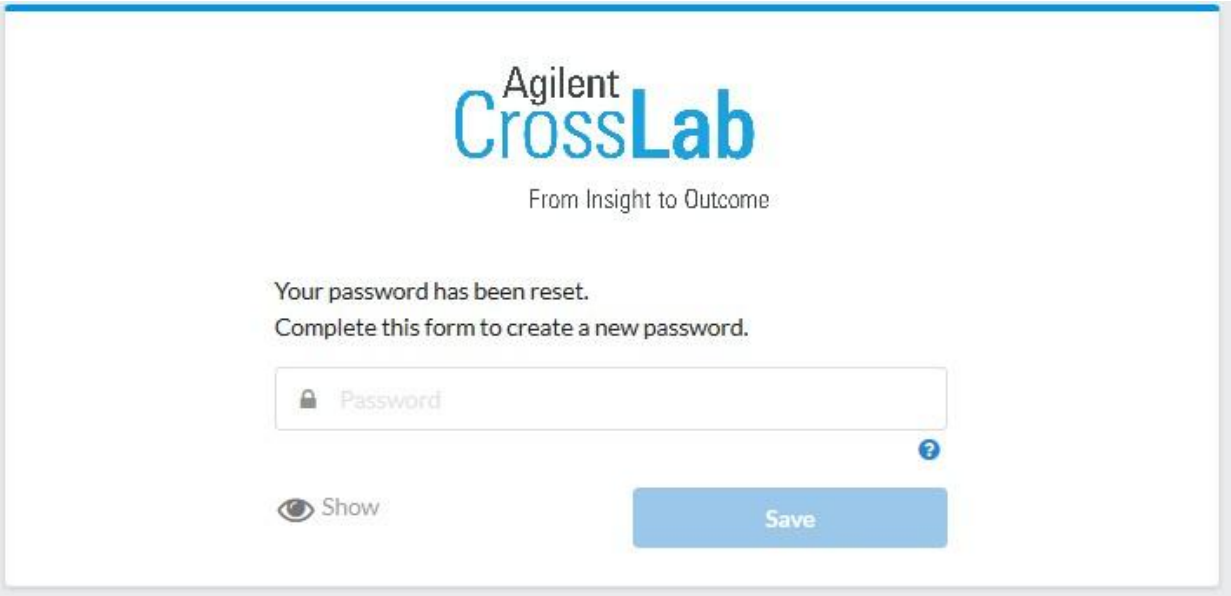




5. You will then receive an email with the link to reset your password. This step is important to ensure it is only you who can change the password. The link is a one-time link just for your password reset.

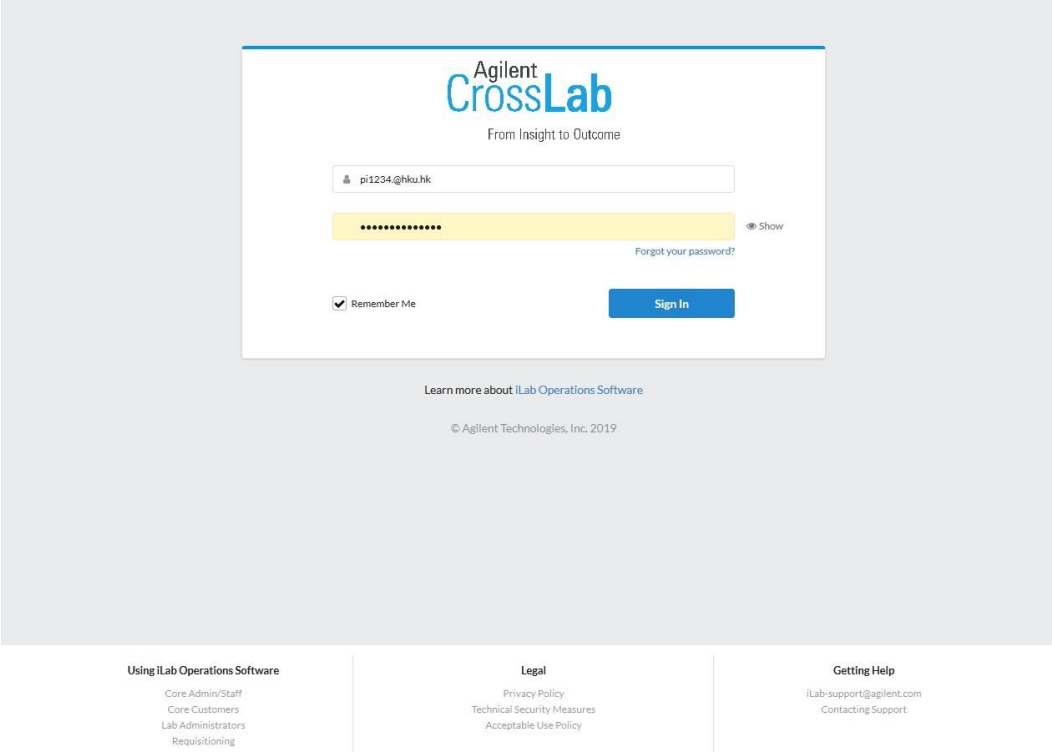


6. Click the one-time link for password change brings to the following page. Just enter your password and click Save. DONE!

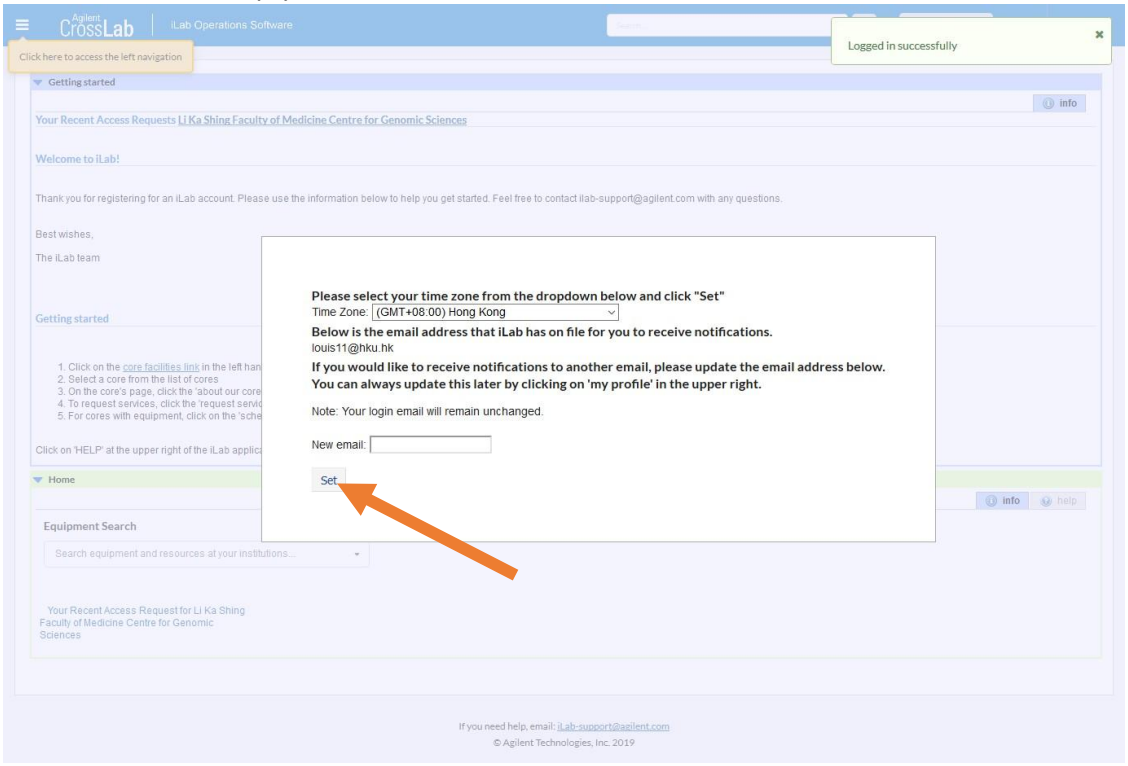


Logging in for the first time

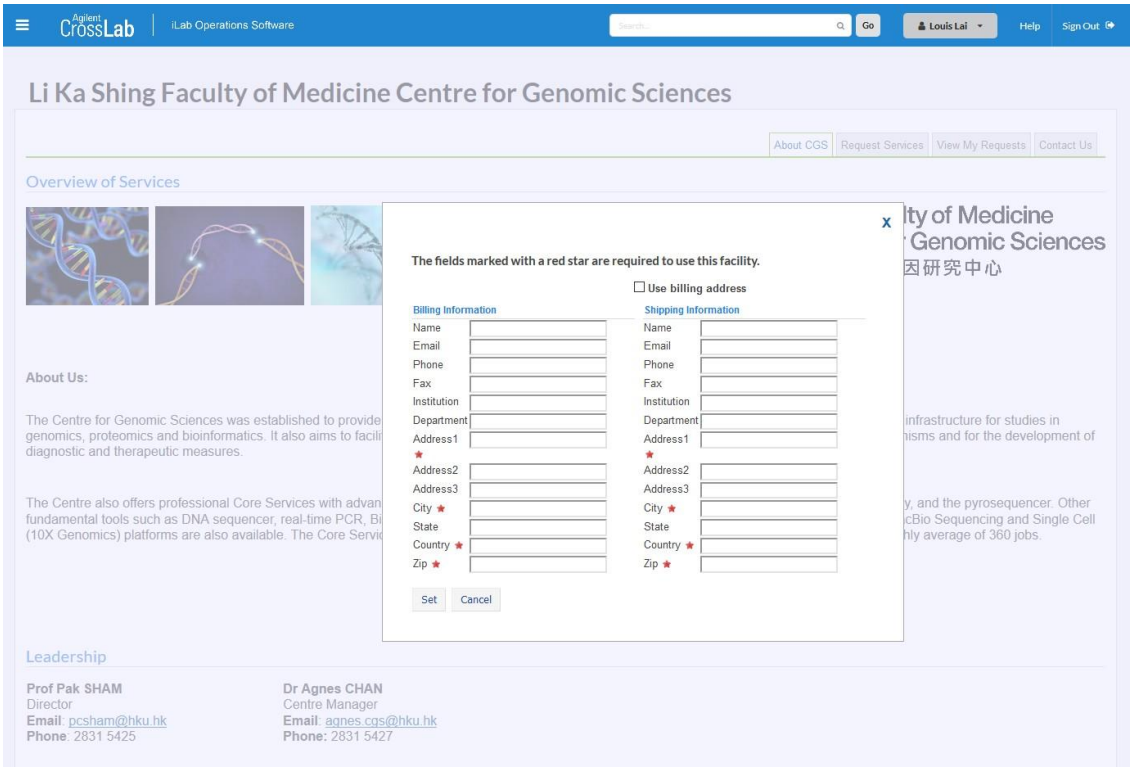
Go to https://au.ilab.agilent.com/account/login
Login using registered email address (contact us if you have not registered yet)



Once logged in, you will be asked to choose the preferred Time Zone, by default, GMT+08:00 Hong Kong Leave the New mail box empty. Click **Set**.

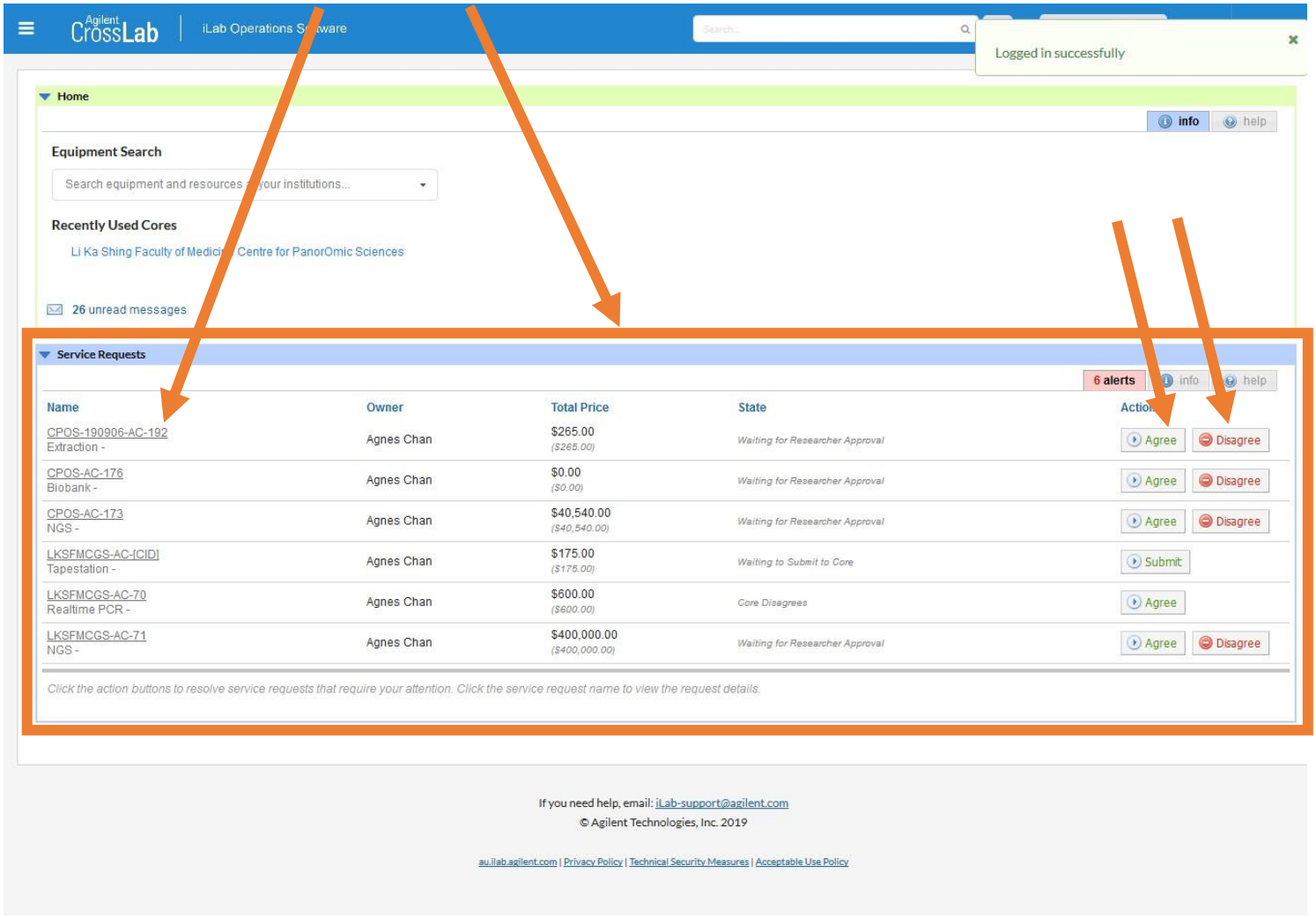


You will then be prompted to enter Billing and Shipping Information. Please input the correct information which will be used in all future invoices.

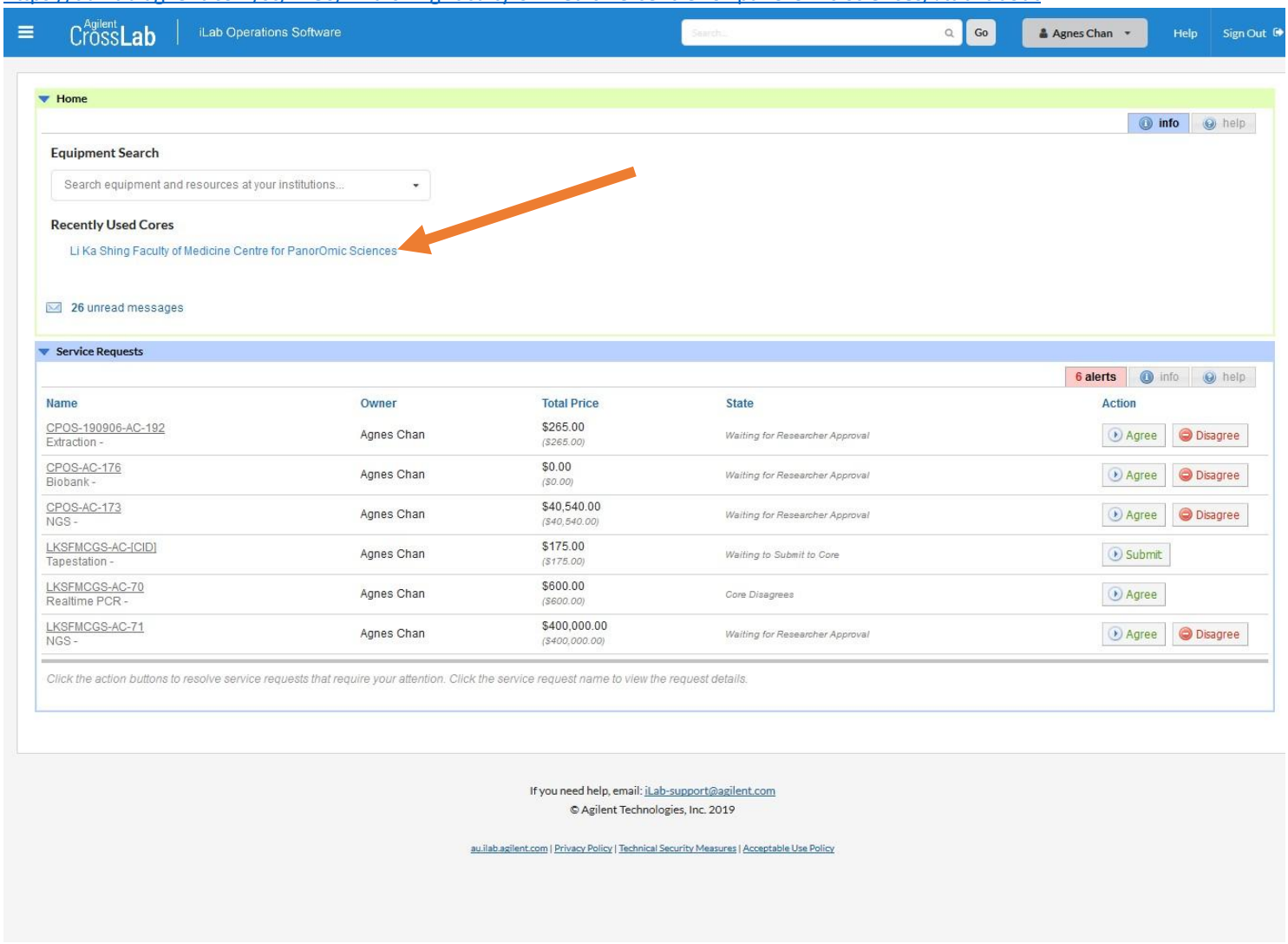


The User Interface of iLab

Your home page right after login. The bottom section shows a list of requests that require your attention. You can directly click the button accordingly to act. You can also click on the service ID to see details of a request.

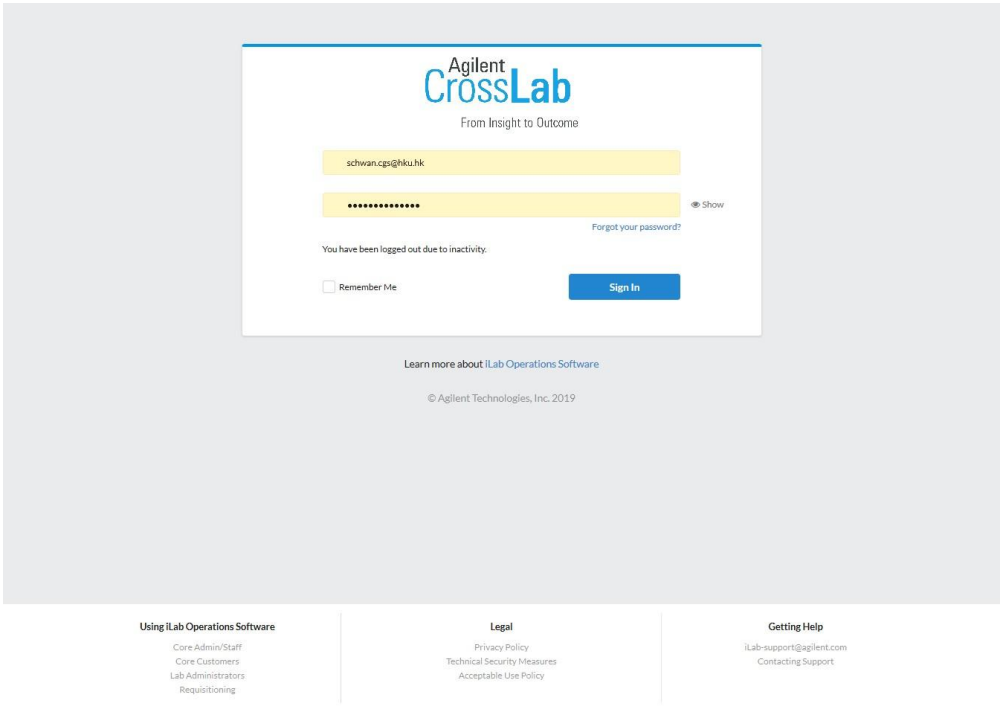


To See more details of all requests, click the “Li Ka Shing Faculty of Medicine Centre for PanorOmic Sciences” or https://au.ilab.agilent.com/sc/4486/li-ka-shing-faculty-of-medicine-centre-for-panoromic-sciences/?tab=about

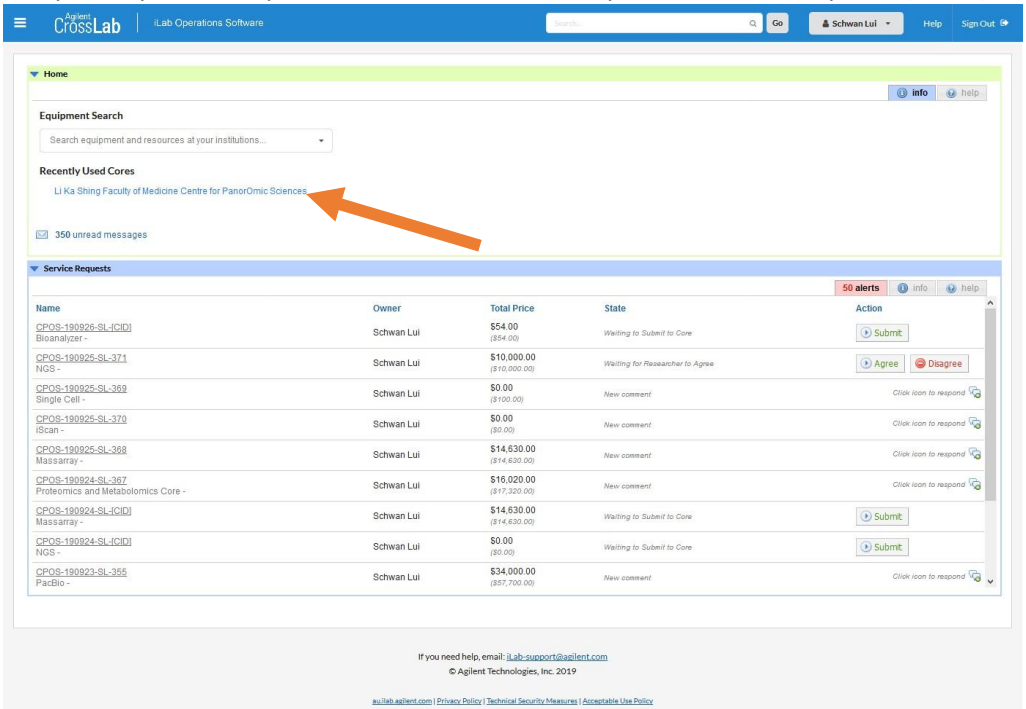


How to make a service request

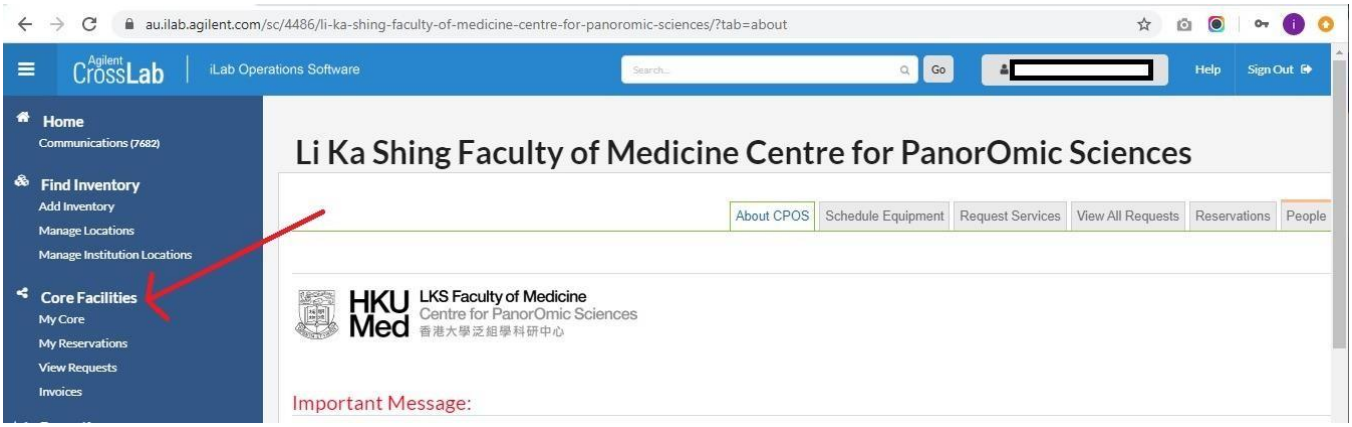
1. Login to iLab (assuming the user account exists in iLab. If not, contact CPOS for account creation)
    a. https://au.ilab.agilent.com/account/login
    b. Assuming Schwan Lui is a user of a PI group (Ng, Bond (HKU) Group, where Bond is the PI)

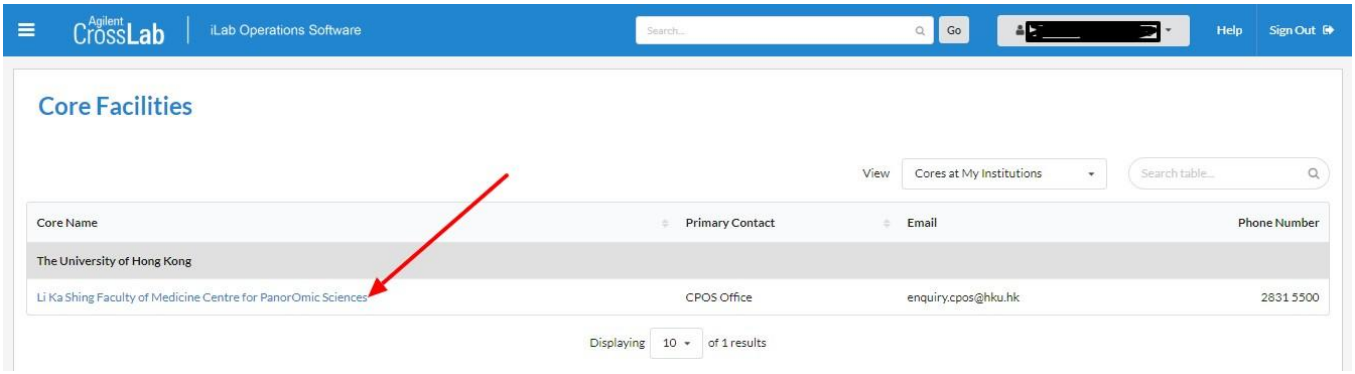


2. Once logged in, user will see the following landing page. In this page, a user can see all requests that are not completed yet and require attentions. In the example, there are 4 requests (alerts) that require user attention.

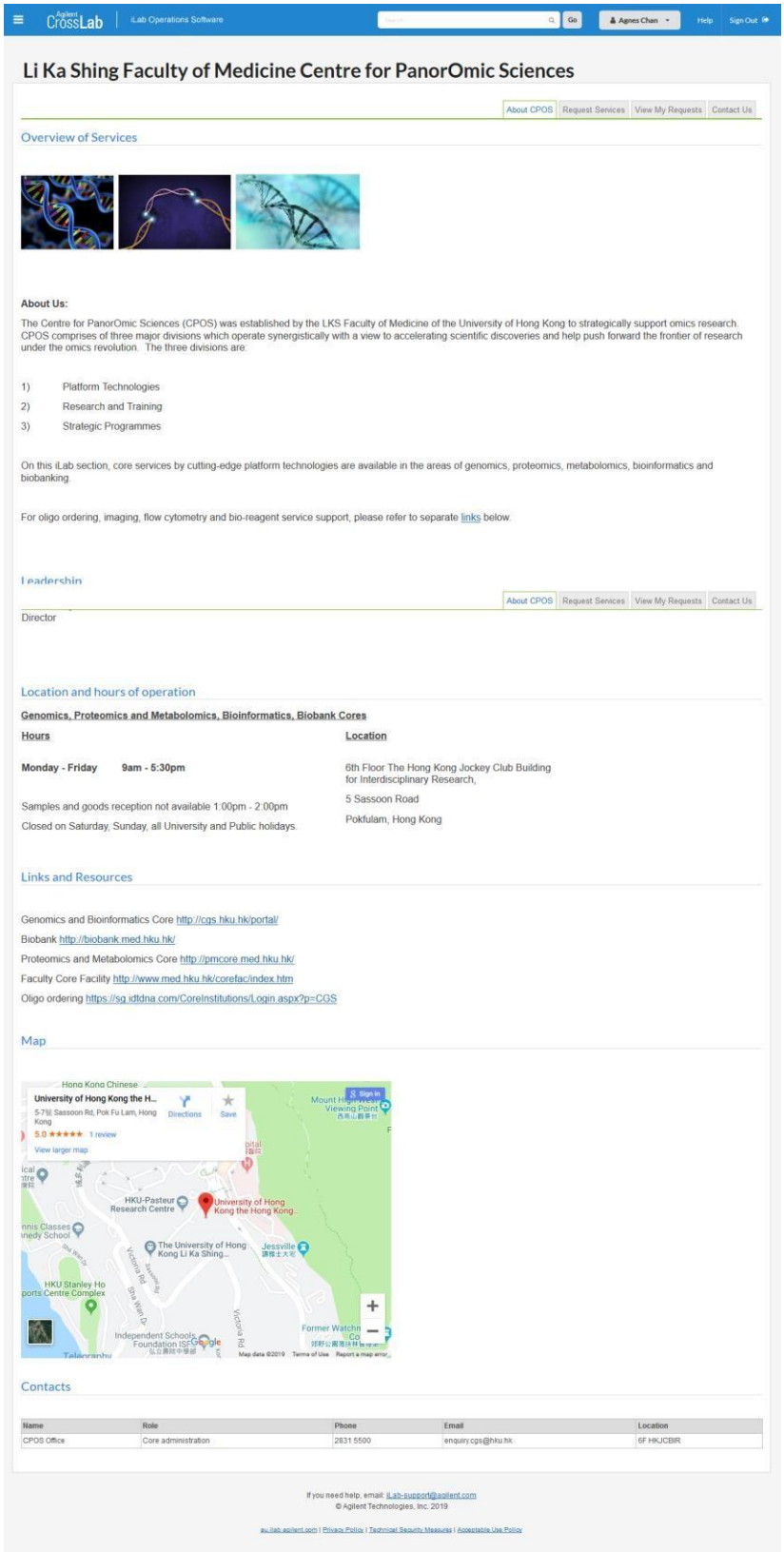


If you don't see the link to the Core Facilities page, you may click the top left menu and then Core Facilities. A link will then show up.

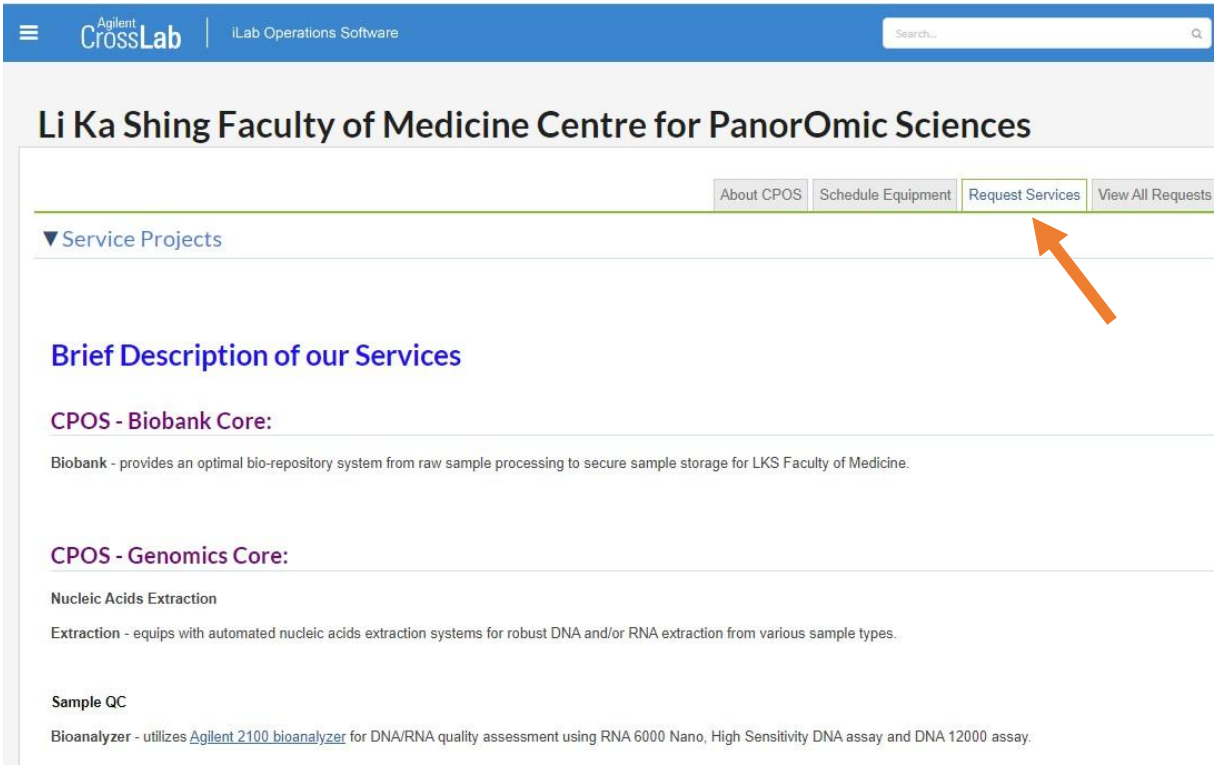




3. Go to the Core (CPOS) home page by clicking “Li Ka Shing Faculty of Medicine Centre for PanorOmic Sciences” or https://au.ilab.agilent.com/sc/4486/li-ka-shing-faculty-of-medicine-centre-for-panoromic-sciences/?tab=about



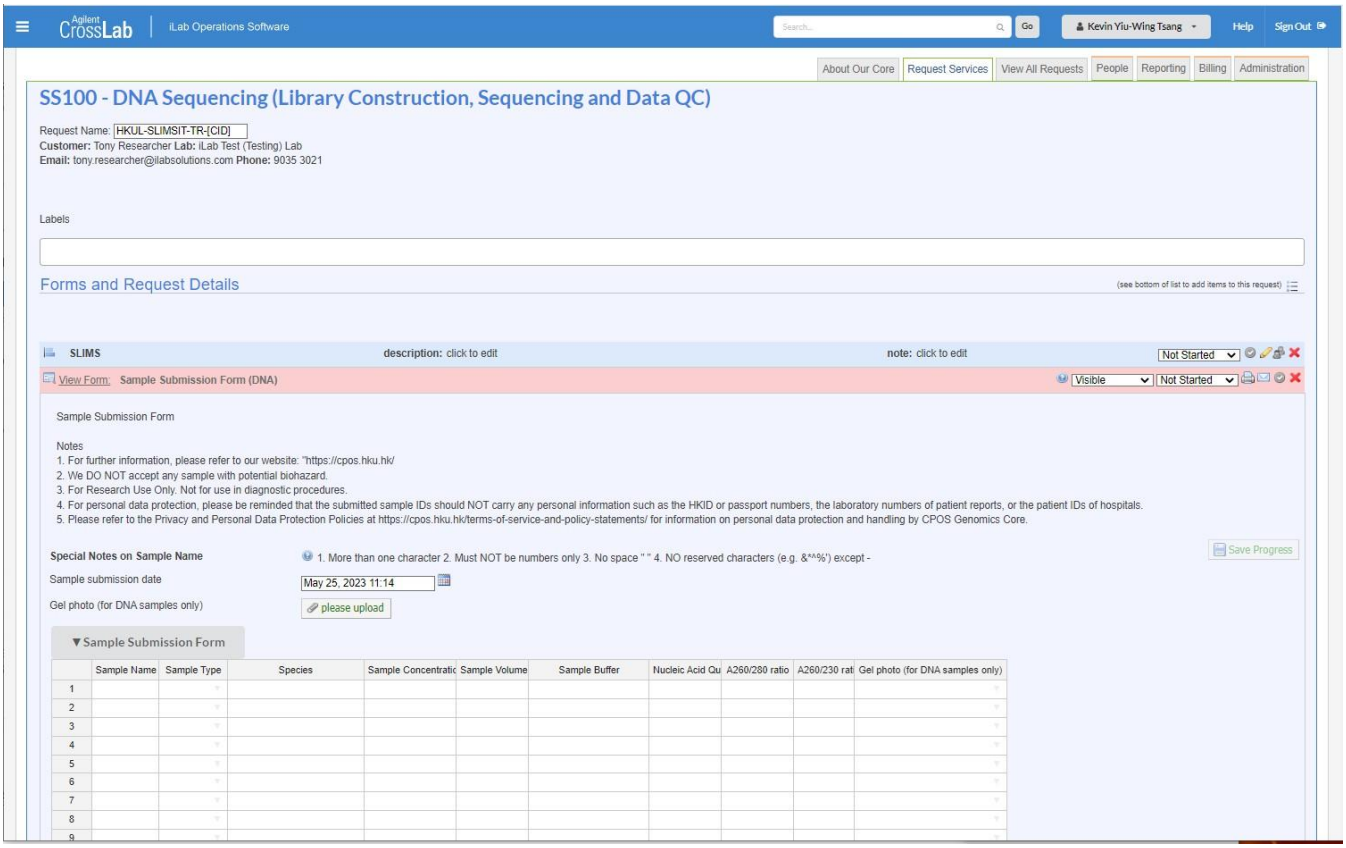
4. Make a request by clicking “Request Services” tab on the top right



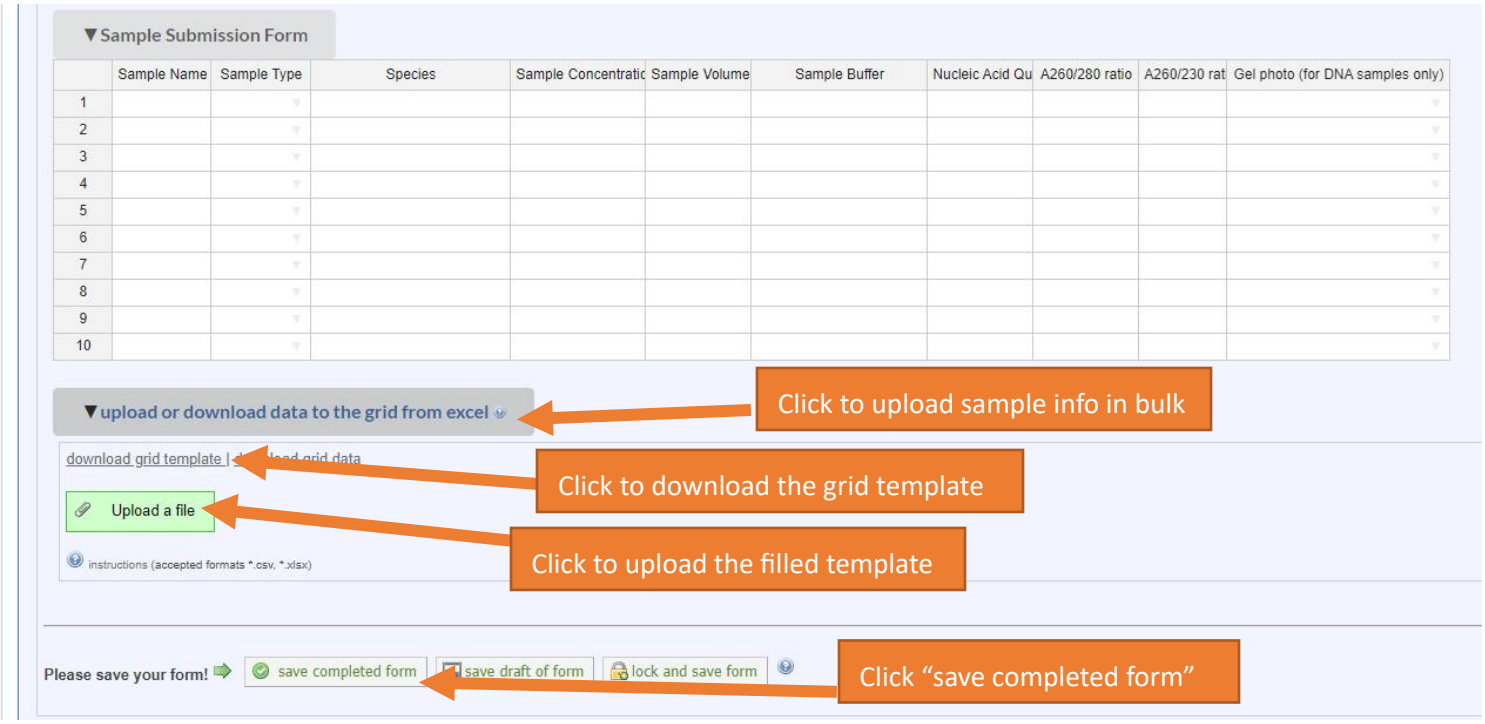
5. To make a request for DNA or RNA Sequencing service, scroll down to the section below



6. After clicking Request of a DNA (SS100/SS200) or RNA (SS300) Sequencing service, fill in the Sample Submission Form with all relevant data by typing direct in the grid or upload all data via a template, which you can download as a CSV file.

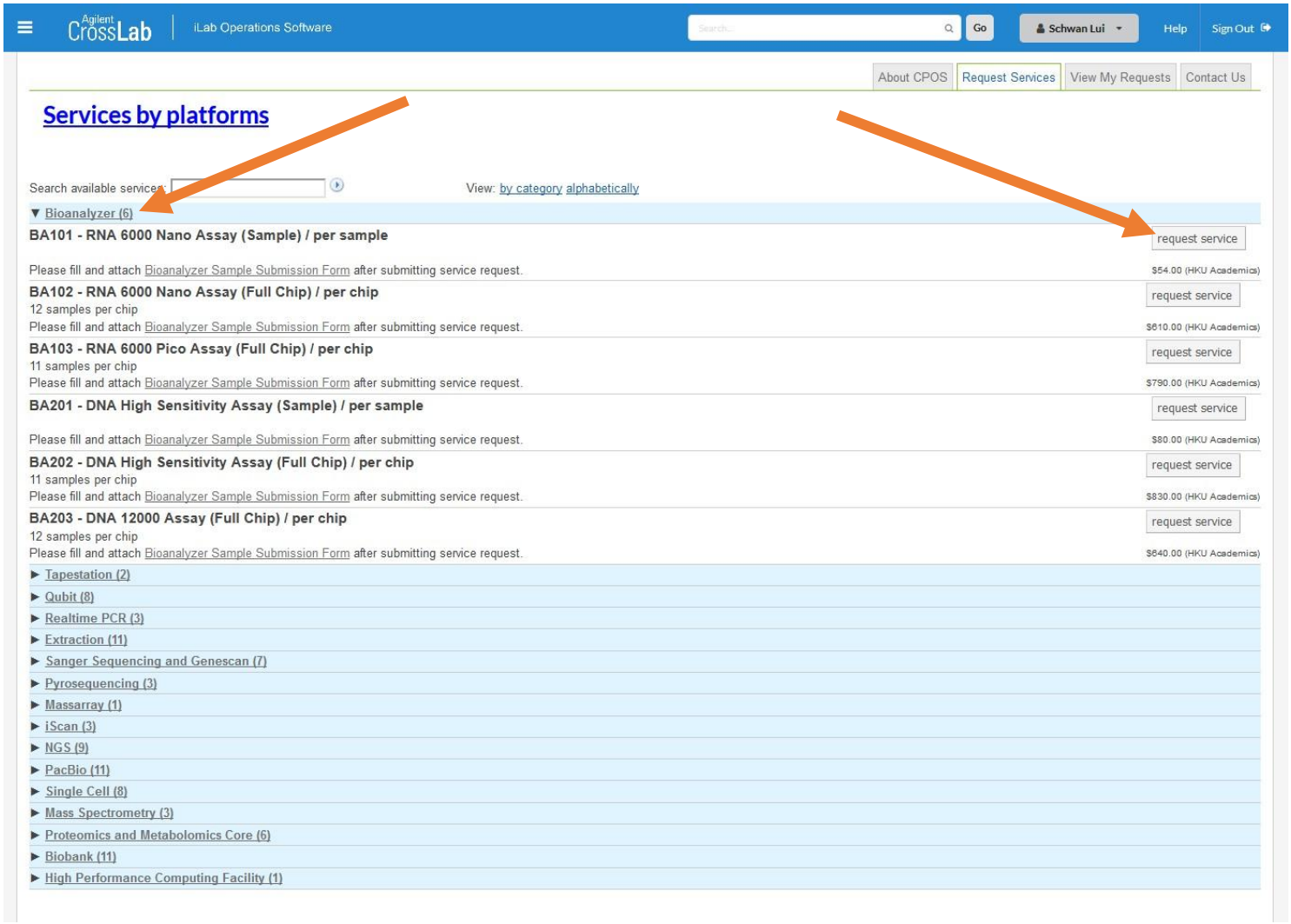


7. To upload sample information in bulk, first download the grid template (empty), fill in the information and save as CSV in Excel. Then click “Upload a file” and select the CSV file that is filled with sample info and save.



8. Finally click “submit request to core” at bottom right of the page. CPOS will then contact you with the service details and sample submission arrangement upon receipt of your request.

9. To make requests for other services, scroll down to **Services by platforms** and choose the required service. Once clicked on a platform, a list of services will be shown below it. Click "**request service**" button on the far right of the desired service. Note that since the user is a HKU user, he has been classified as HKU Academics and thus the corresponding price. For non-HKU Academics or Commercial, there may be a different pricing scheme.

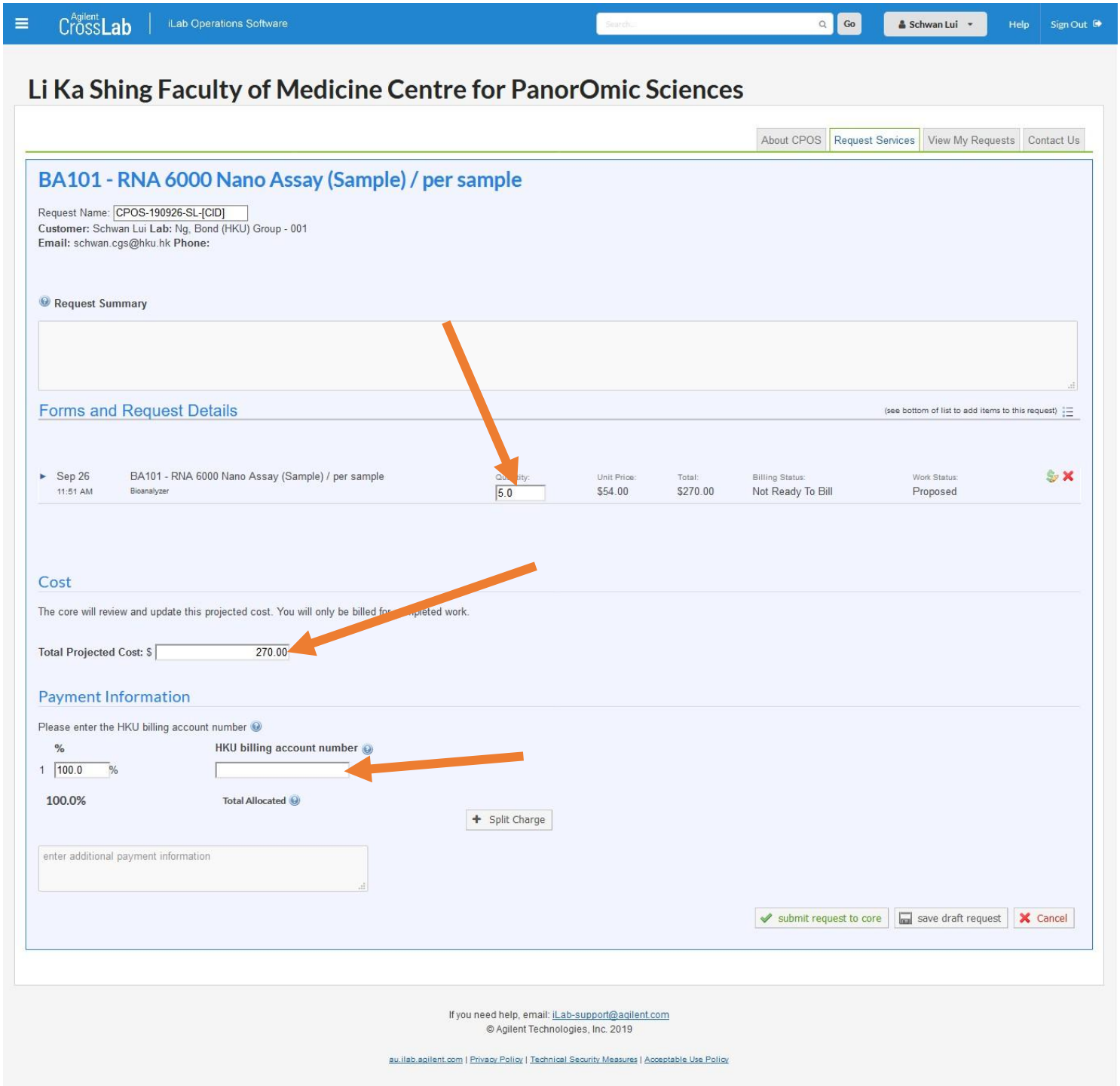


10. In this example, a request for “BA101 - RNA 6000 Nano Assay (Sample) / per sample” is raised. Since the user (in this example) belongs to more than 1 PI groups. User will be prompted to select a group to submit the request for.

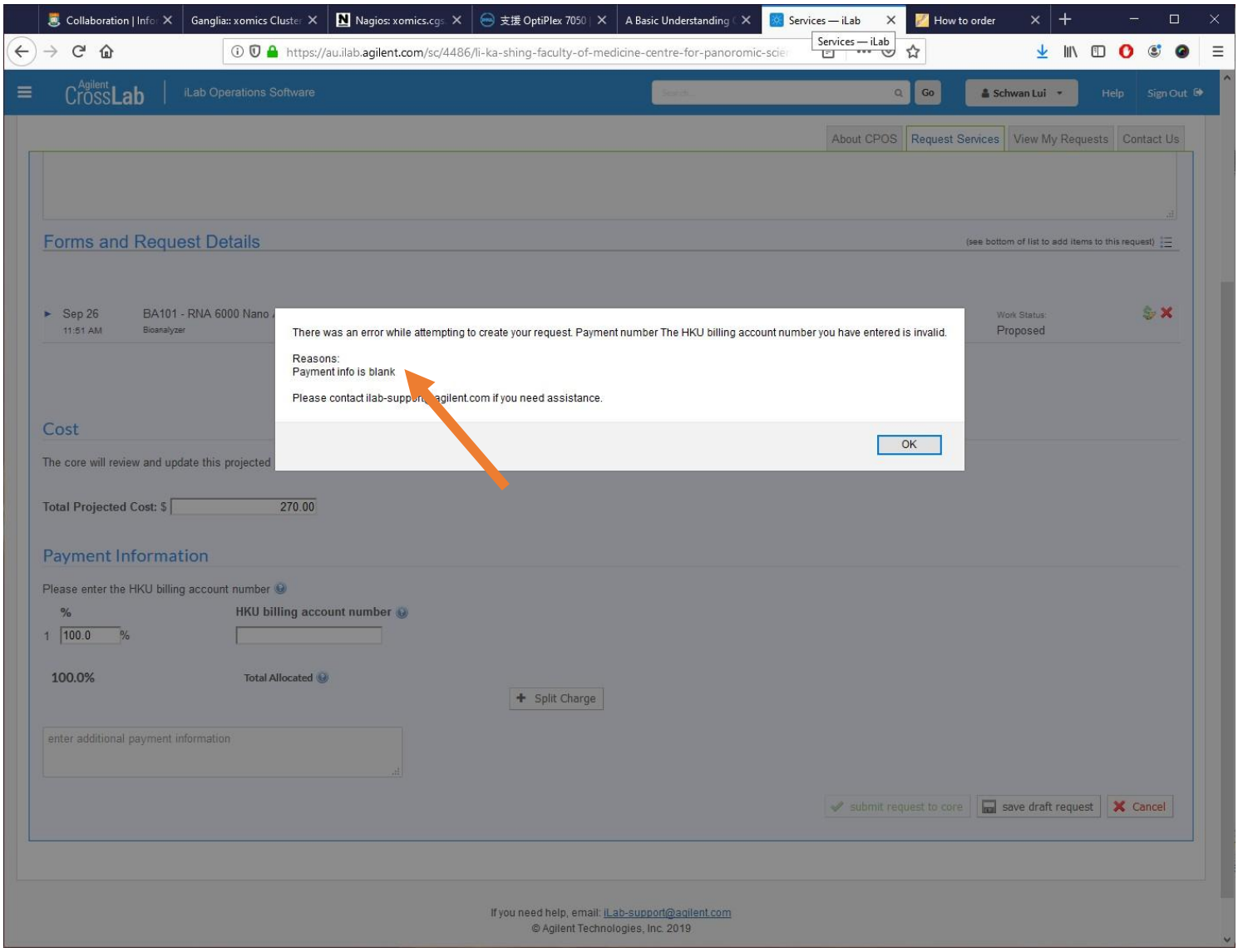


Notes: It is important to ensure the correct PI group is selected. Otherwise monthly invoices will be incorrectly created and thus charged to incorrect PI accounts.

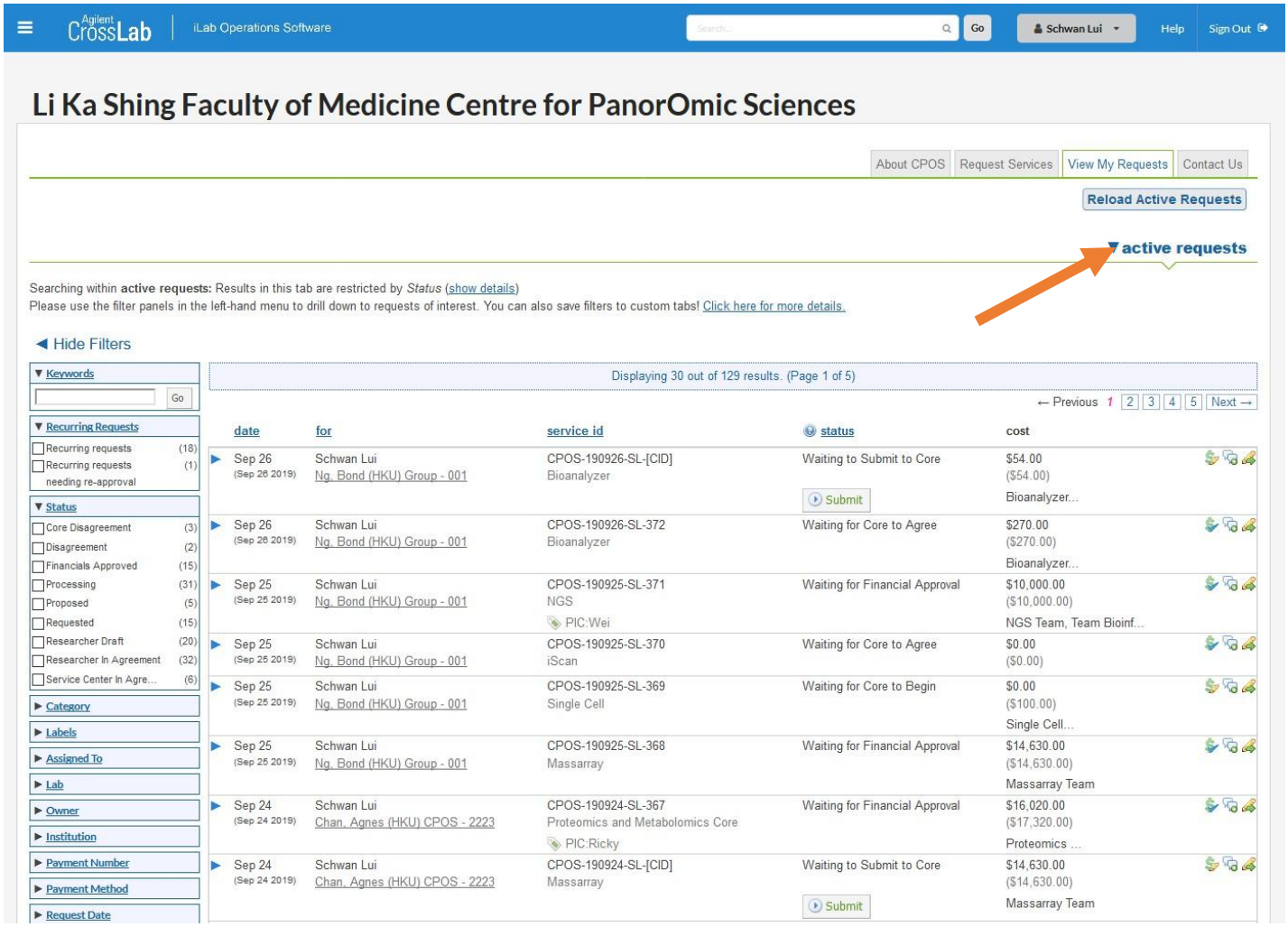
11. User shall then input Quantity (5 in this example) for the service (BA101). Note the Total Projected Cost will be automatically adjusted accordingly. This figure is meant to provide a close estimation on service charges. This may not necessarily end up to the final invoice charges.
    a. User will need to input HKU billing account number or the service request may not be processed.
    b. User can also choose to split the charges into different accounts by % **(ONLY by %).**



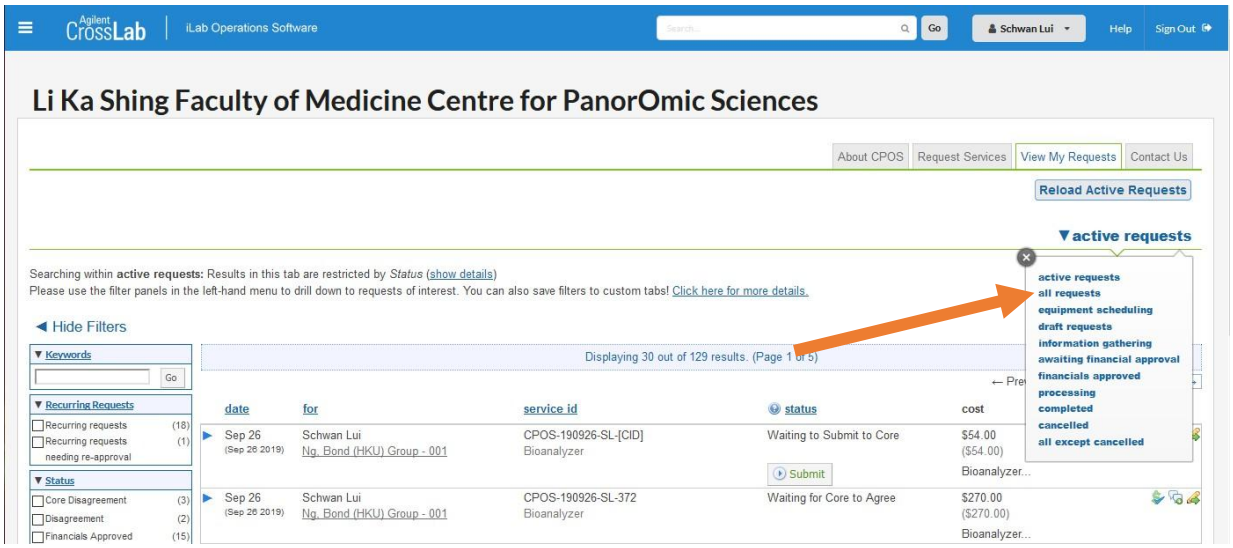
12. If HKU billing account number is absent, user will be prompted with error when clicking “submit request to core” at bottom right.



13. User will then be brought to a page of showing all “active requests” by the user. Note that “completed requests” are not shown by default.



14. User can click the “active requests” link on top right section. A list of options will be shown. Select “all requests” to see all requests ever submitted by user, including completed ones.



15. **Status of a request** – A typical request will be in any one of the following status.

    a. **Waiting to Submit to Core** – a request has been selected but not yet submitted to Core (ie CPOS)

    b. **Waiting for Core to Agree** – a request has been submitted to Core and being reviewed by Core

    c. **Waiting for Financial Approval** – a request is waiting for confirmation by user/PI on the total service charge. A PI can authorize a user to approve a certain amount of charge.

    d. **Waiting for Core to Begin** – a request has been approved by PI/authorized user. Core to arrange process start date and due date.

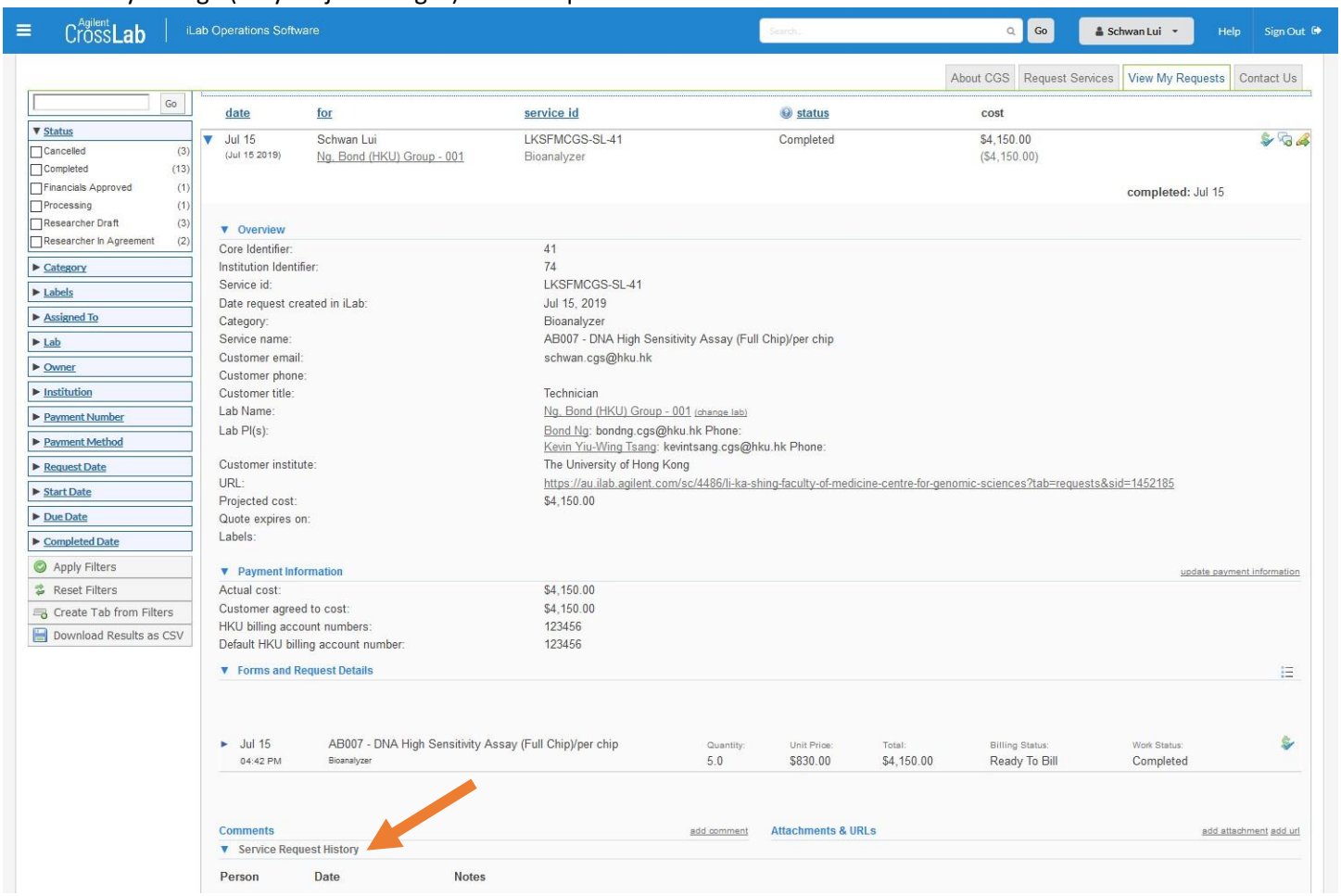
    e. **Processing** – a request is being processed.

    f. **Completed**

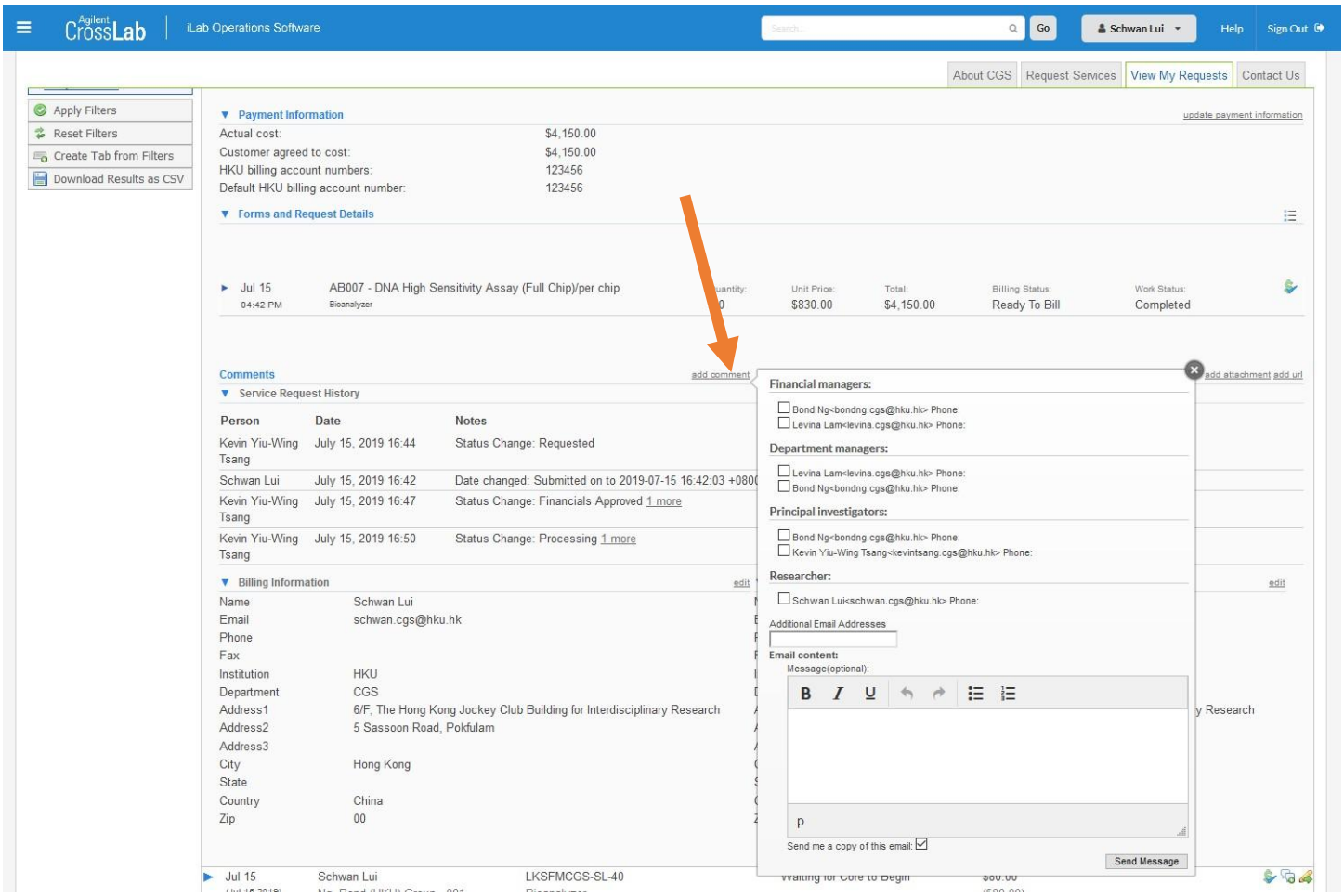
    g. **Cancelled** – a request is cancelled either by requester or by Core

    h. **Core Disagrees** – Core refused to carry out the request.

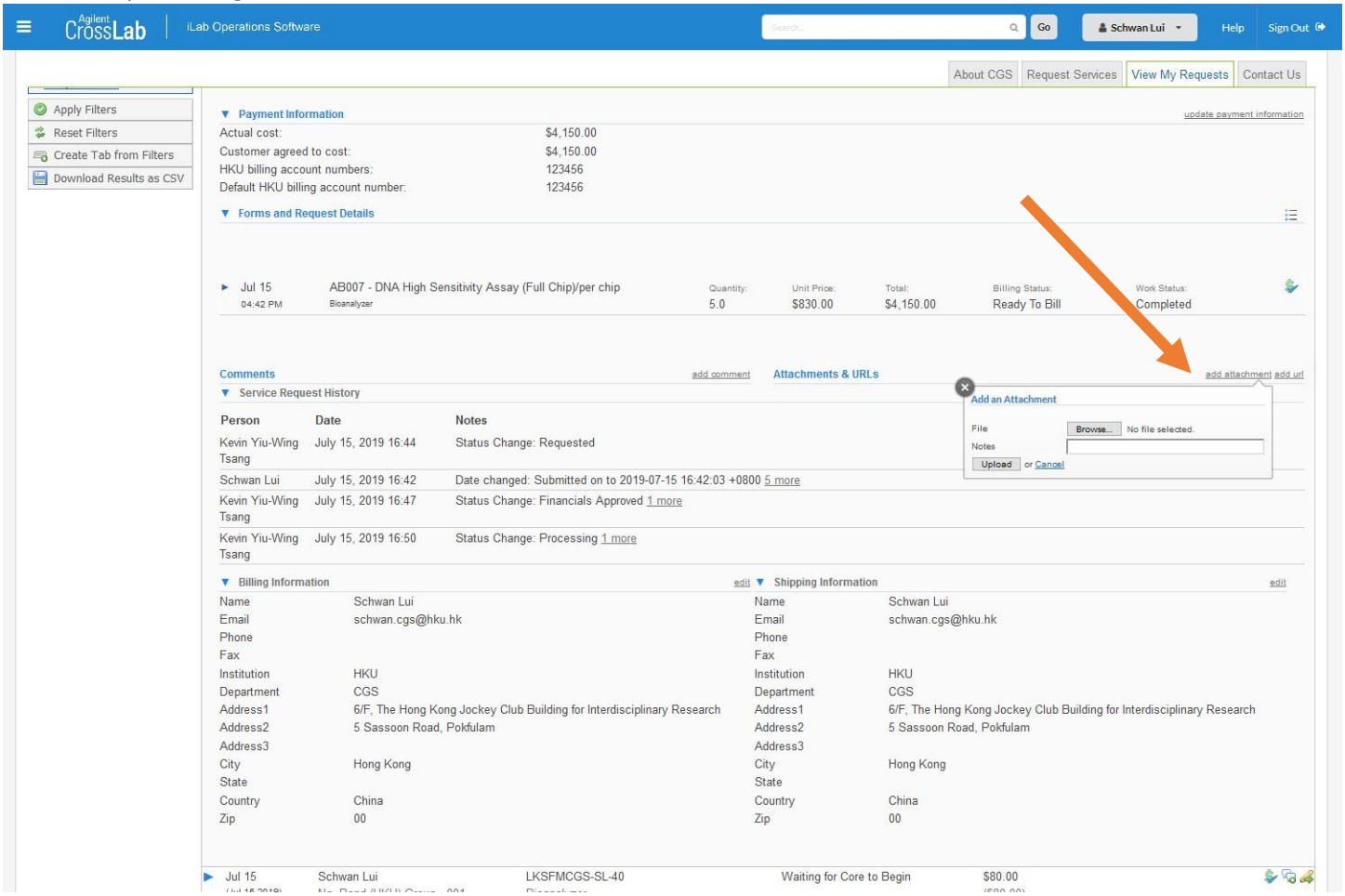
16. During the whole process of request submission until it is completed, user/PI can choose to login to iLab and view the status of the request. "**Service Request History**" shows all status history of a request. But it does not keep track of every change (only major changes) in the request.



17. The “add comment” feature allows requester to send message to selected people directly in iLab.



18. “Add attachment” enables requester to upload any file, such as Samples information sheet for sample submission before processing.



Invoices and payments

Invoices are generated electronically on the last working day of each month for review.

An email containing the invoice attachment will be sent to the PI and the group's designated primary contact (if applicable). No hard copies will be provided.

Both the PI and the group manager can review the invoices in iLab. Unless a dispute is raised, all invoices will be automatically charged to the billing account specified in the request.

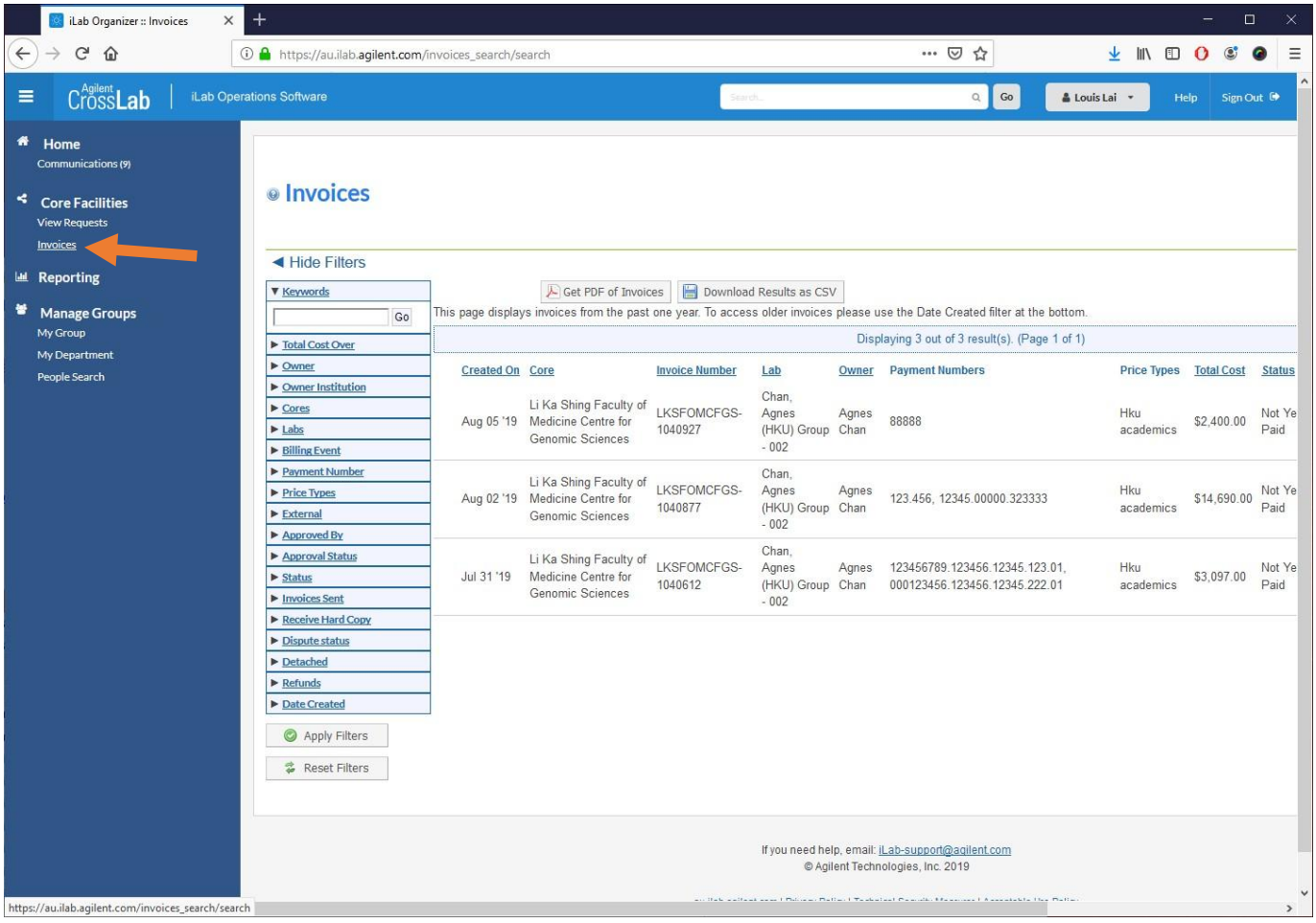
How to view and check invoices

Only the PI or the PI group manager (authorized by the PI) can view all invoices of that PI group. A user (member) of a PI group can only view invoices that contain requests raised by him/her.

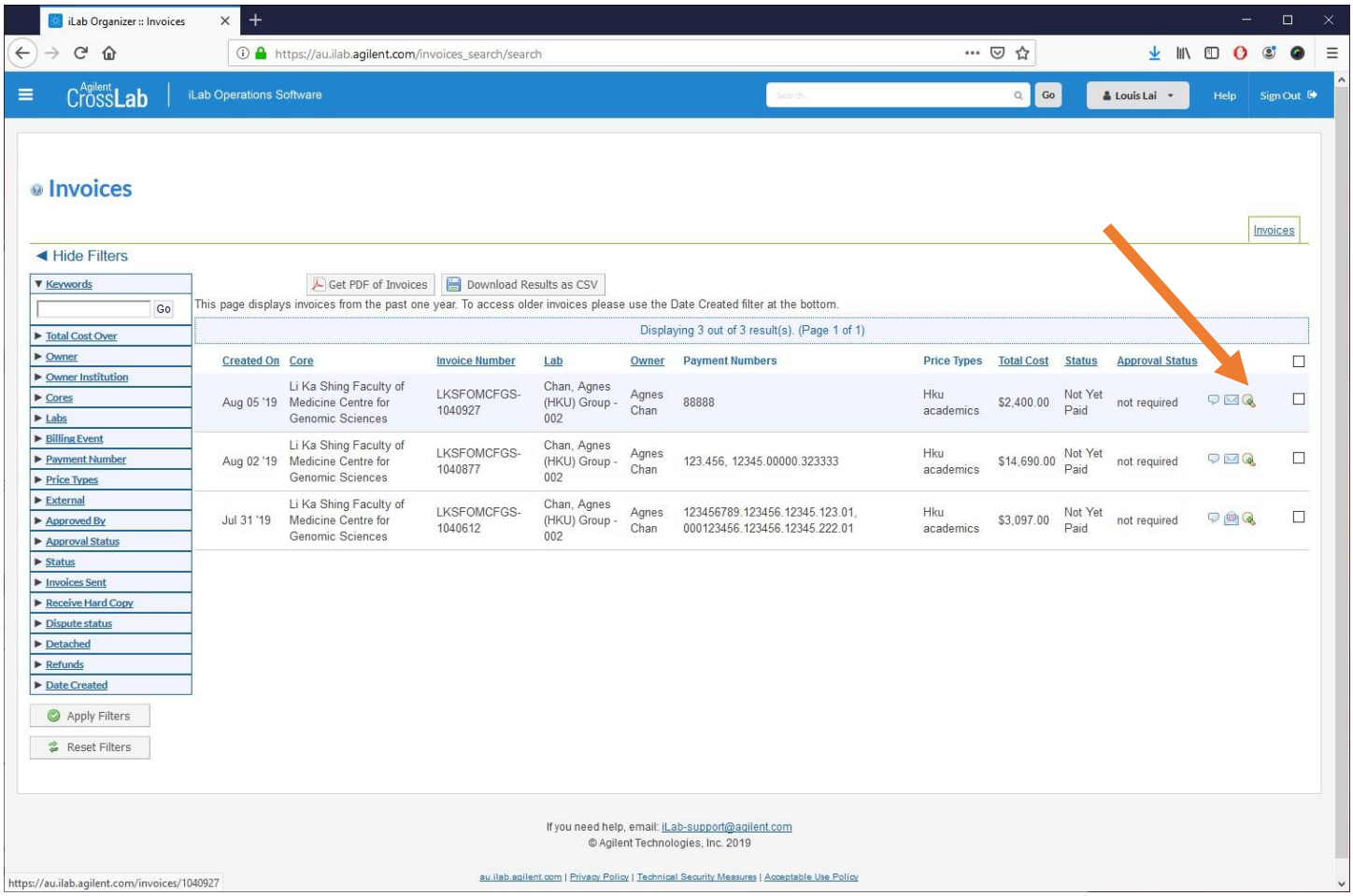
After logged in, click the menu at top left of the page to show the menu.



Click Invoices



Click  to view a particular invoice.

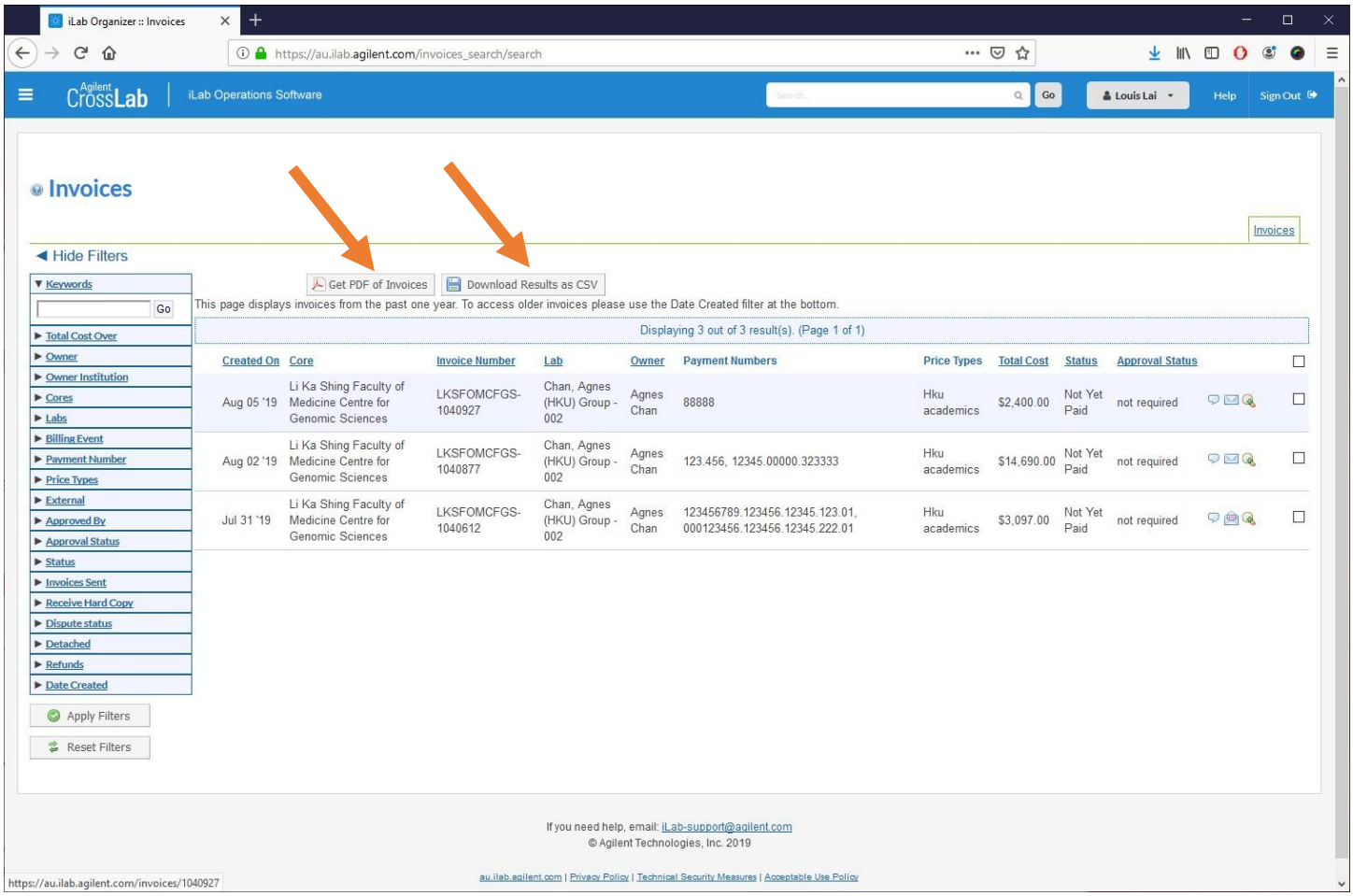


Checking and downloading an invoice

Since no hard copy will be sent out, it is important each invoice is checked by the PI. You can choose to view invoices in PDF format within iLab or you can download the invoice to your computer in PDF 

or CSV formats 

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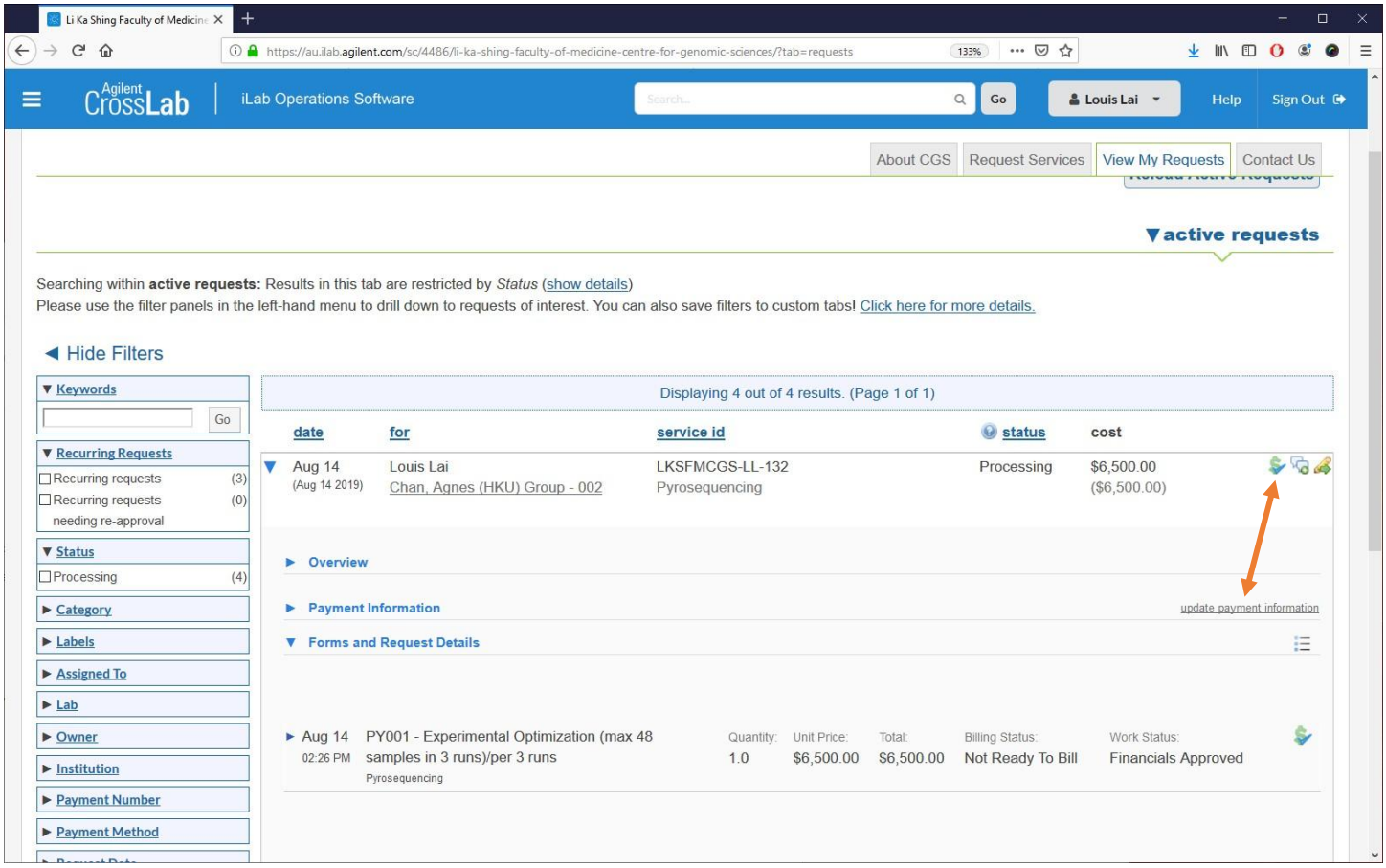
How to update Payment Information

Before the invoice is generated:

Payment information is entered when service request is made. If you need to change the Billing Account after the service request is made and/or processed, you can make the change any time before the invoice is generated, usually by the last day of each month.

IMPORTANT NOTES:
If you are a HKU user, you must fill in a valid HKU billing account number when initiating a request. If you are a non-HKU user, you can fill in "NA" in Payment info.

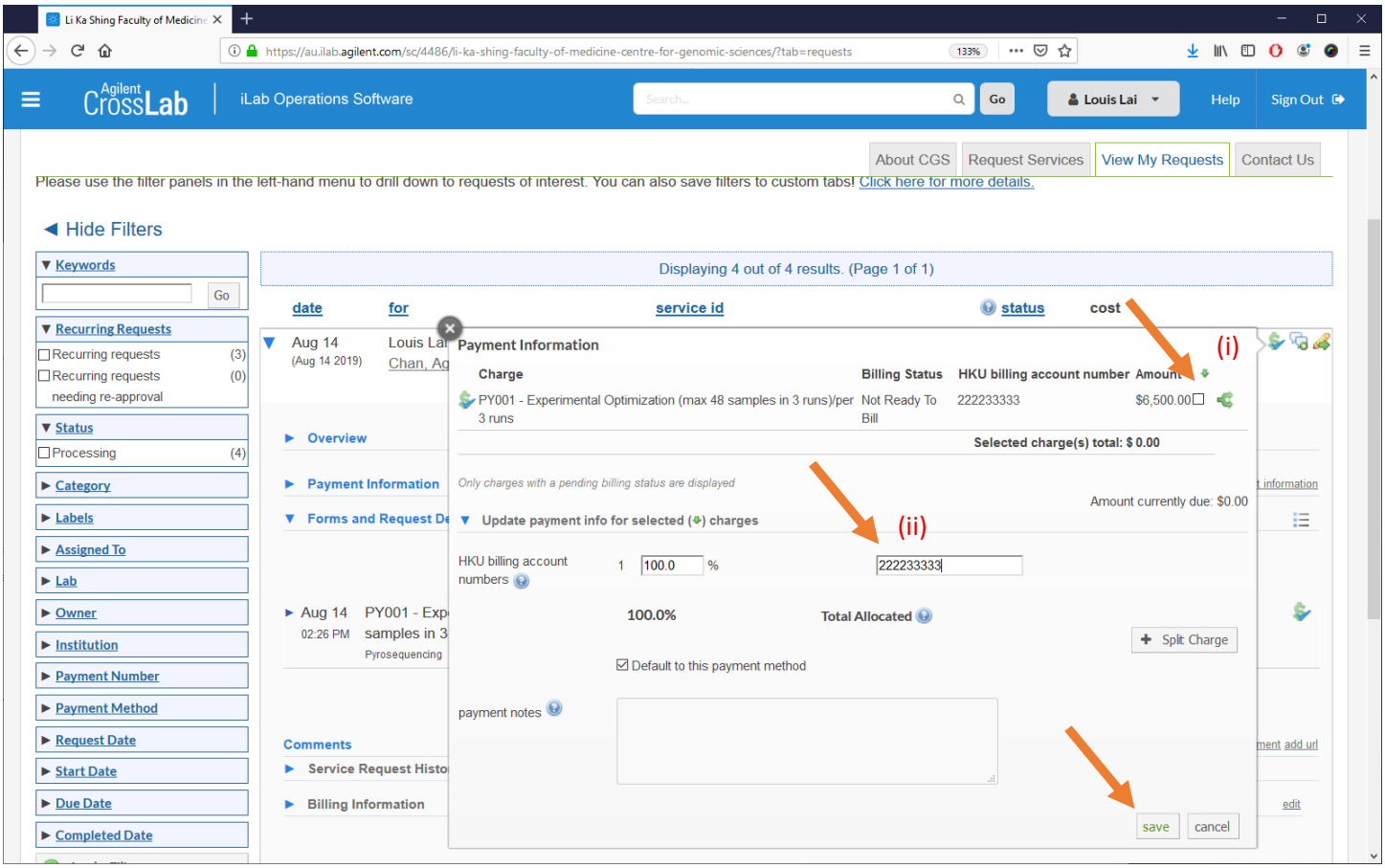
To make the change, select the request that requires payment info change and click  or "update payment info"



When the “Payment Information” window is opened, please:

(i) Check the box(es) on the right side of each charging item(s),
(ii) Change the billing account as needed

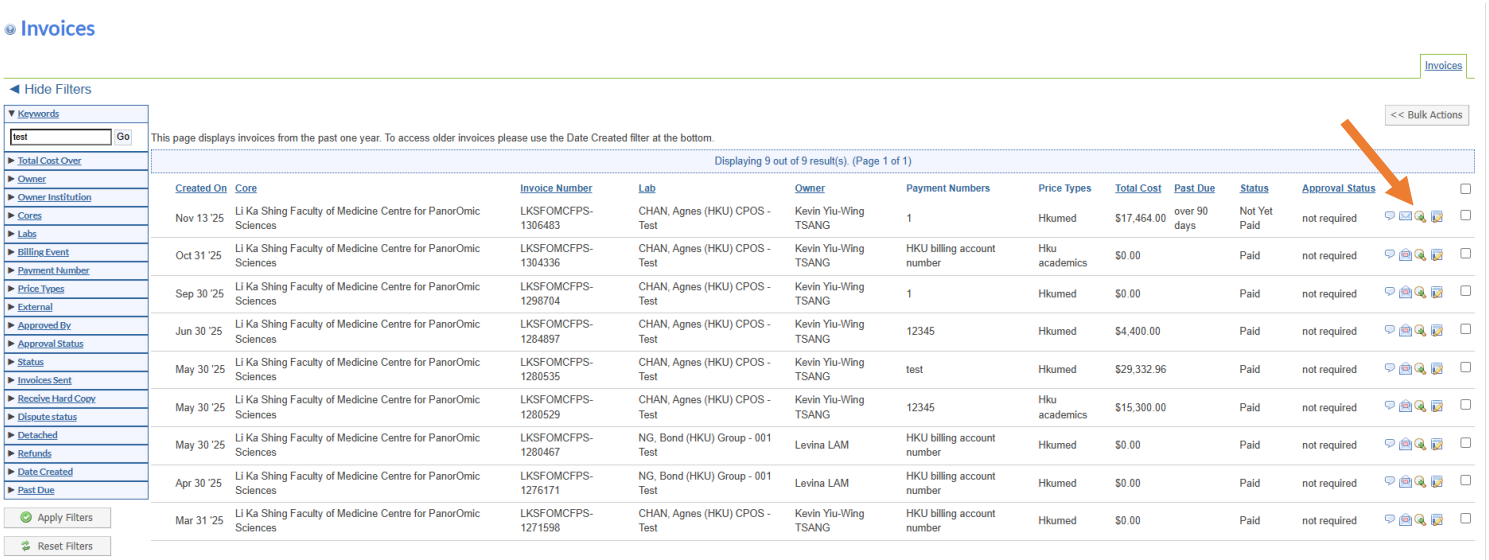
Click “**Save**” to confirm the changes.



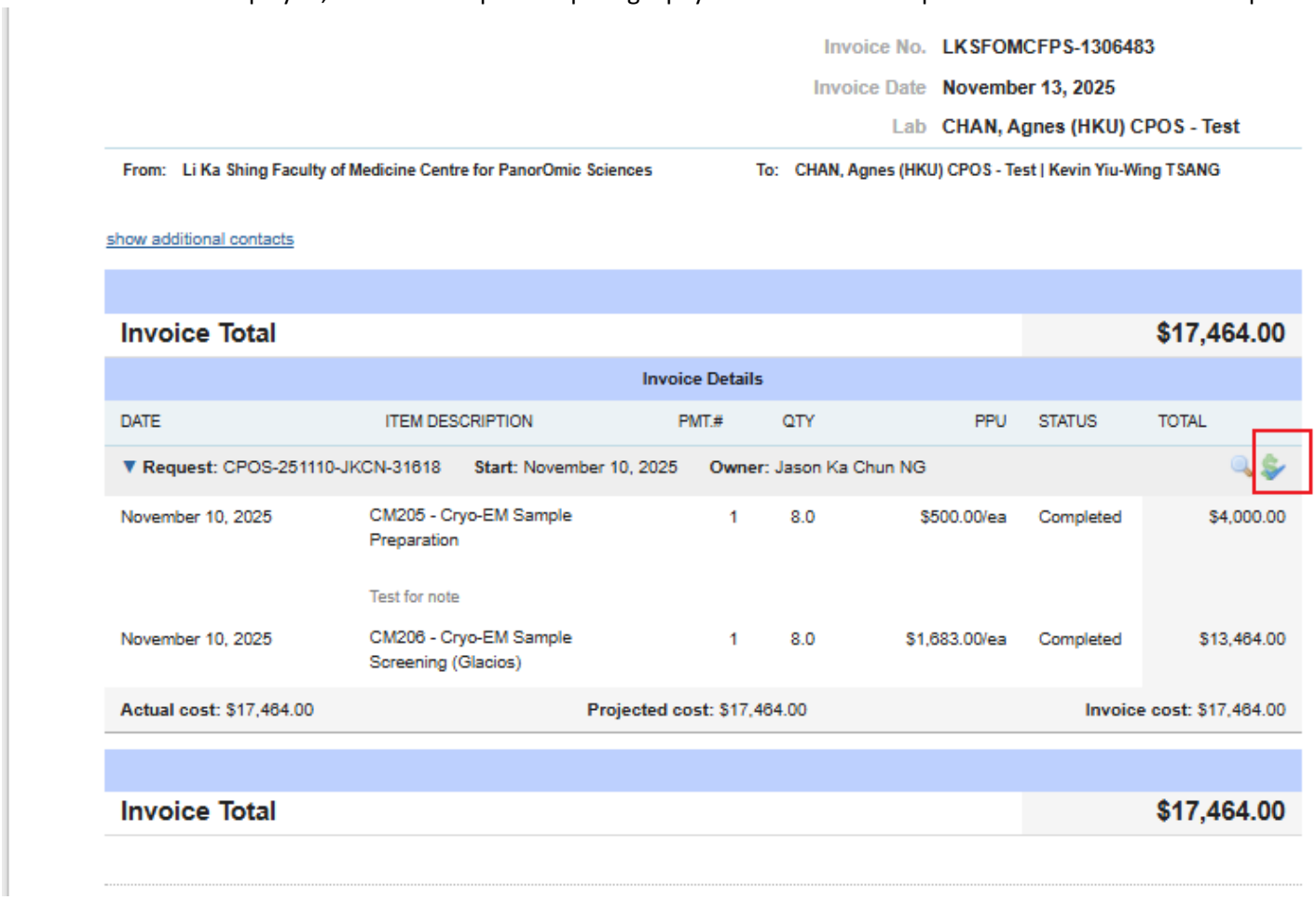
Note: Click cancel anytime to cancel the changes. You must click Save to permanently change the setting/value.

After the invoice is generated:

To make the change, click  to view the specific invoice you would like to update.



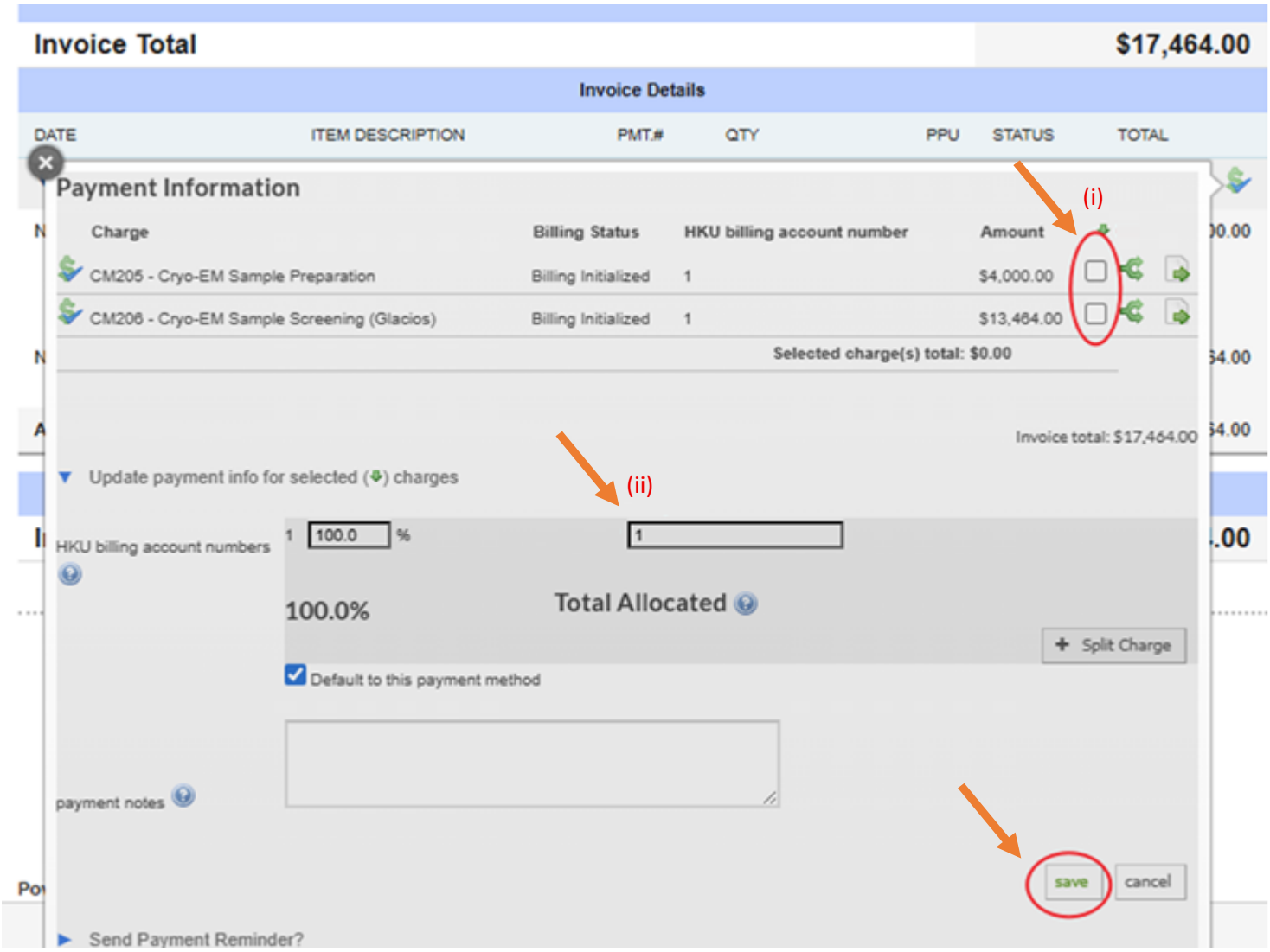
Once the invoice is displayed, select the request requiring a payment information update and click the relevant option .



When the "Payment Information" window is opened, please:

(i) Check the box(es) on the right side of each charging item(s),
(ii) Change the billing account as needed

Click "**Save**" to confirm the changes.



Note: Click cancel anytime to cancel the changes. You must click Save to permanently change the setting/value.

After saving, refresh the invoice interface, and the billing account should be updated accordingly.

For **recurring services**:

For **previously issued invoices**, update the billing account in the relevant **invoice interface** (same steps as to update AFTER invoice is generated).

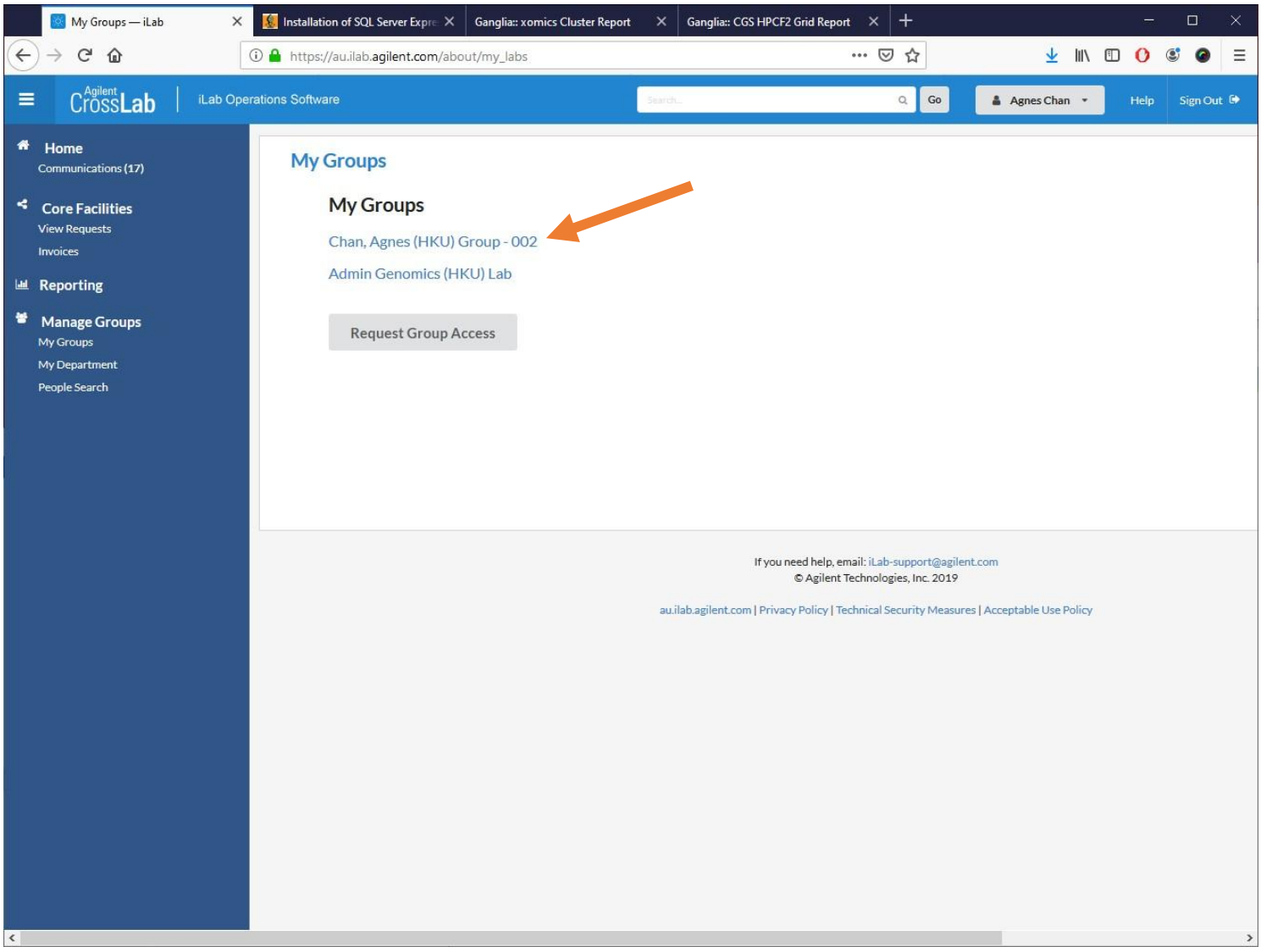
For **future invoices**, update the billing account in the **request interface** (same steps as to update BEFORE invoice is generated).

Managing your group (lab) – PI only

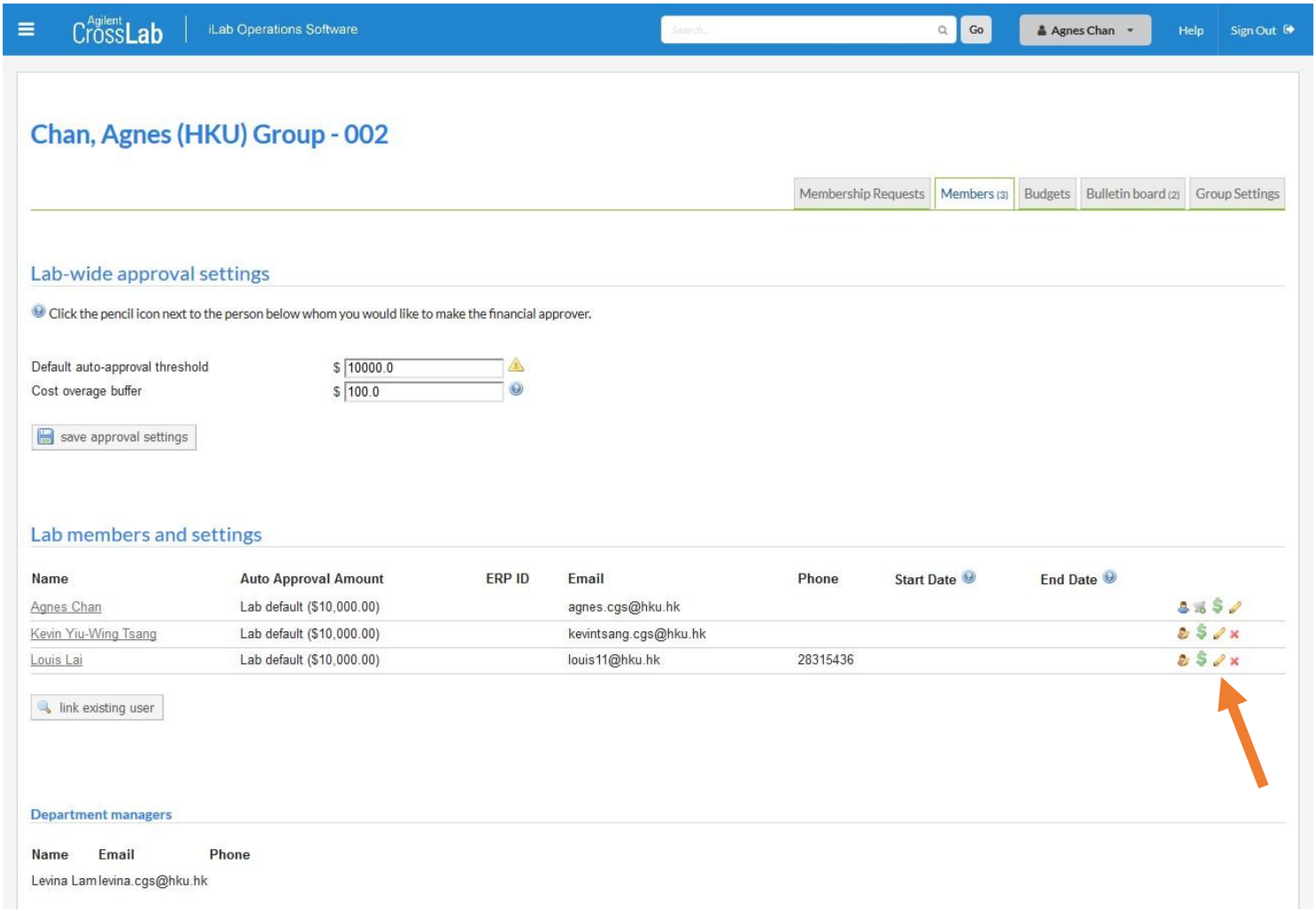
As the PI of a group (lab), you have total authority in managing who can raise a service request, financially approve a request, view and confirm invoices, set Lab-wide (group-wide) auto-approval limit.

How to authorize a Lab/Group Manager for your group

This can only be done by PI of a Lab/Group. Login with the PI account. Click Menu at top left corner and then My Groups. You shall then see all the Groups (Labs) you belong to.
Click the group you would like to authorize a member.



In the section “Lab members and settings”, you shall see a list of researchers/members of your group. Click the “yellow pencil” icon at the far right of the member who you would like to be your manager of the group.



Click to select Manager and Save.



The Manager can now perform daily operation on your (PI) behalf.

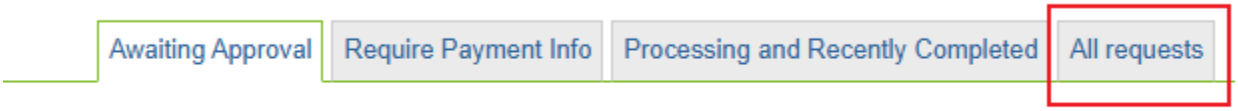
View All Requests

As a PI or Manager of a group/lab, you can view the requests for the whole group/lab.

Top left menu →Core Facilities →View Requests



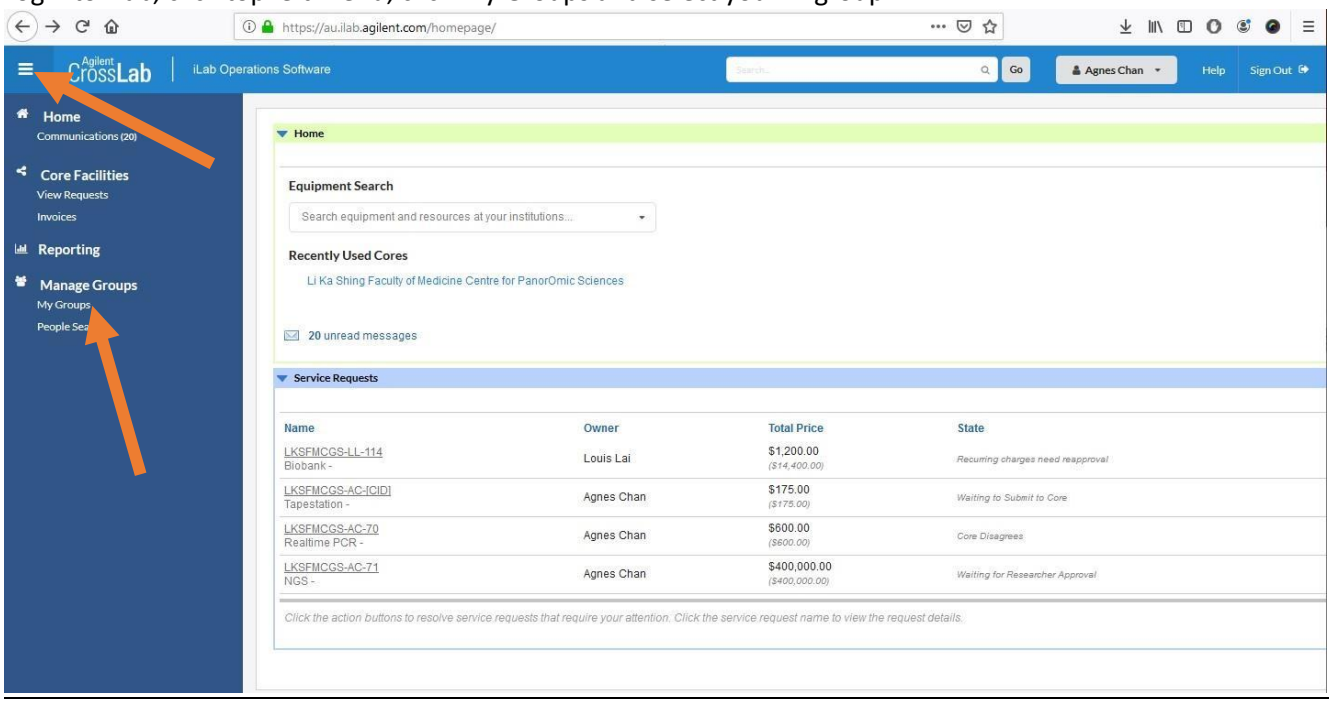
Choose 'All requests' tab on the top right.



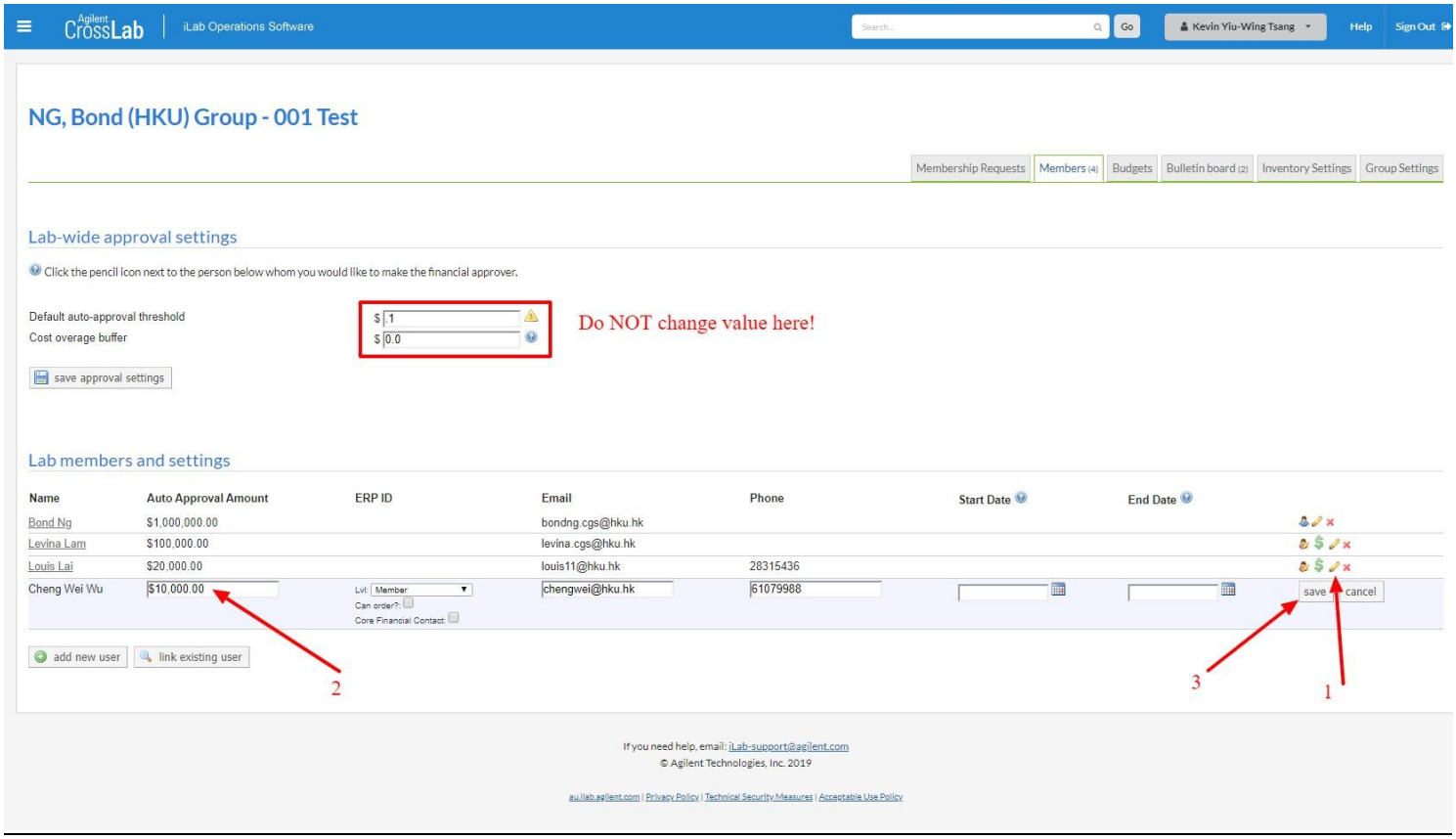
Changing Auto Approval Amount

As a PI or Manager of a group/lab, you can set/change Auto Approval Amount for individual user of your group/lab. Any member of your group/lab can make any service requests with a total projected value under that threshold without the need for financial approval.

Login to iLab, click top left menu, click My Groups and select your PI group.



Important Notes: DO NOT change the values in Lab-wide approval settings. Only change the Auto Approval Amount for individual user



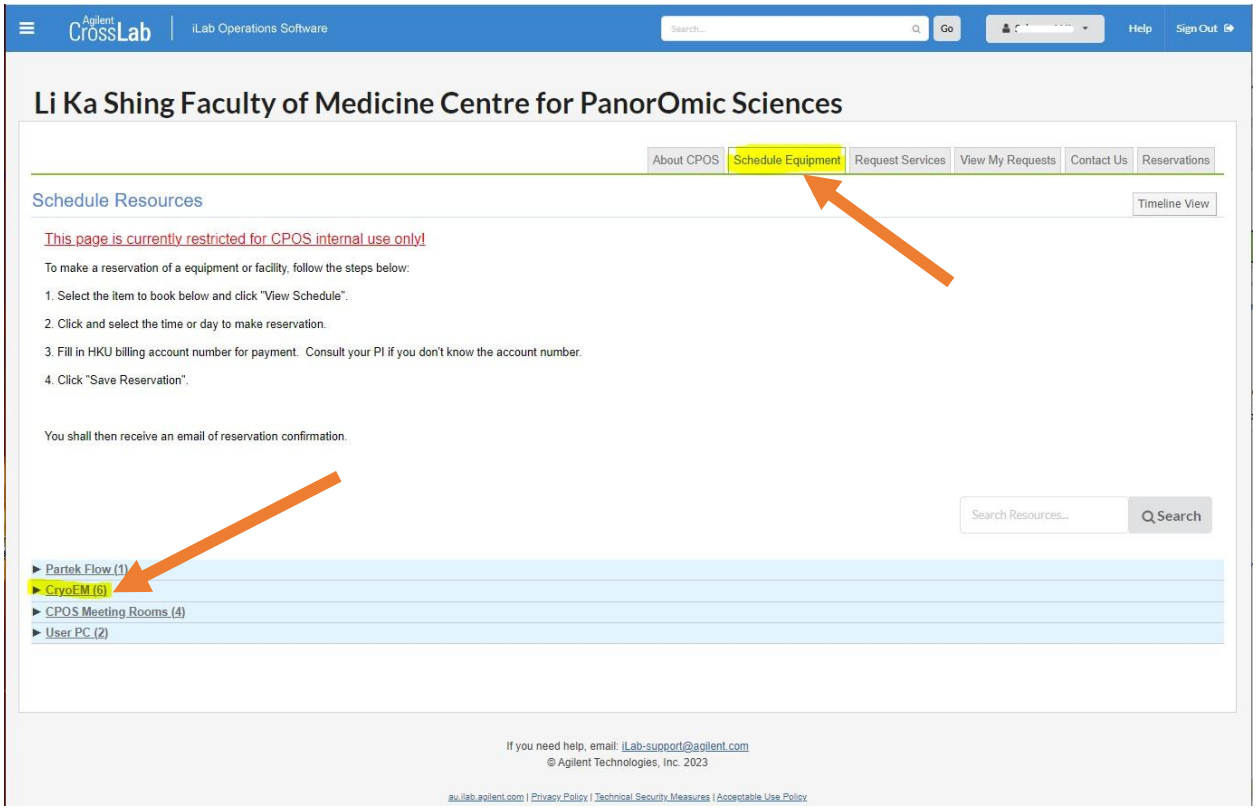
Change the Auto Approval Limit for individual user

1. Click on the “yellow pencil” icon on the right of the user to change. 2. Change the value in the box
3. Click “save”.

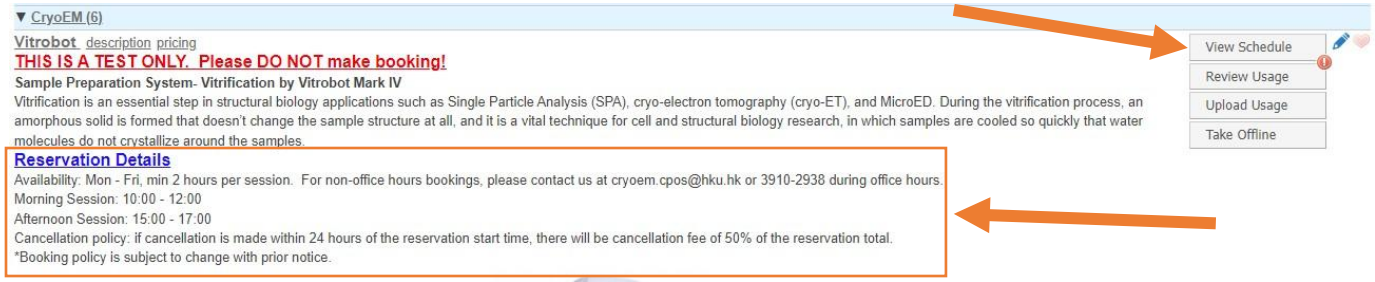
Scheduling Resources/Equipment – making a reservation

There are currently 2 types of resources in iLab that allow user reservation, namely Partek Flow and CryoEM.

Login to iLab
Go to Schedule Equipment tab and click CryoEM to expand.

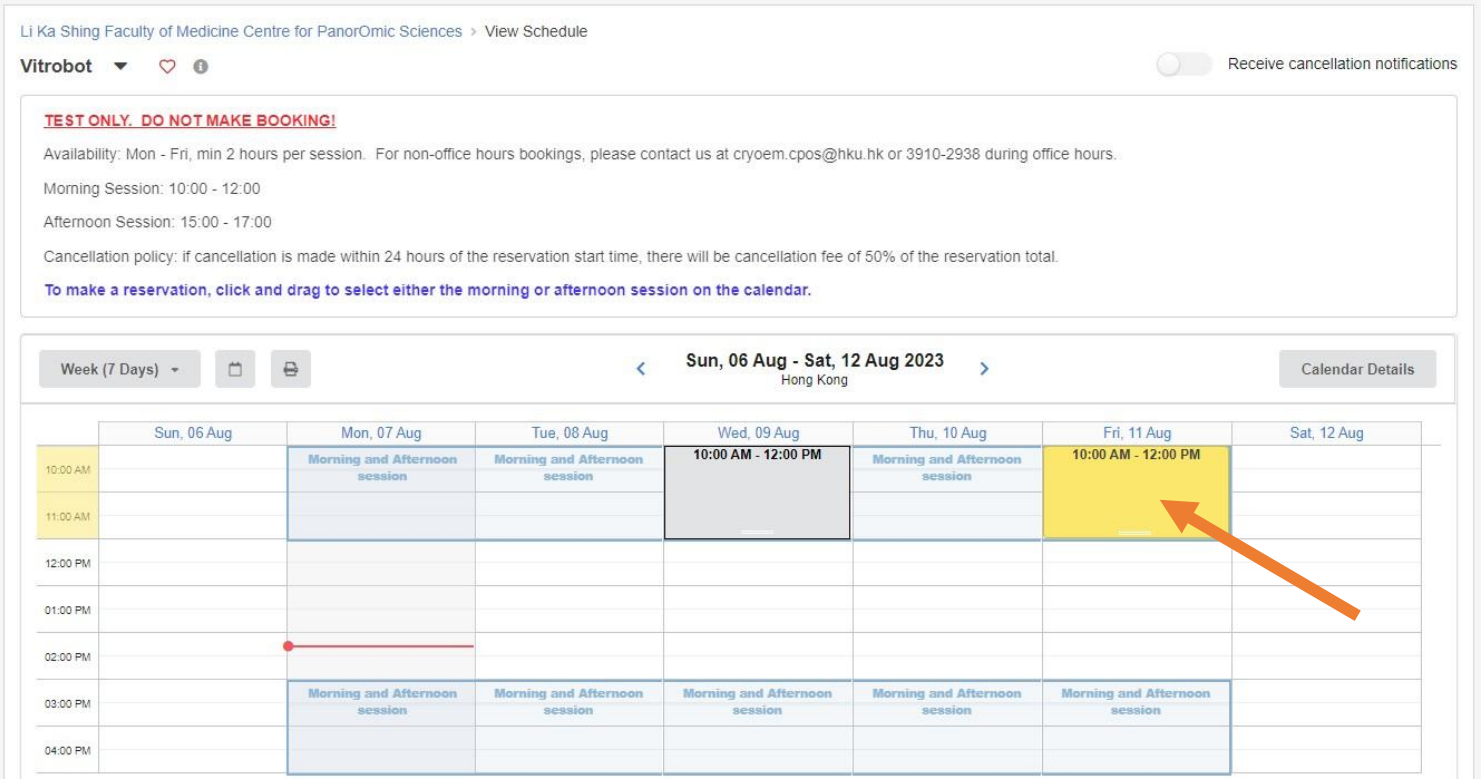


To make a reservation on a particular equipment, please first check out the reservation details, policy and charges. Click View Schedule to begin reservation.





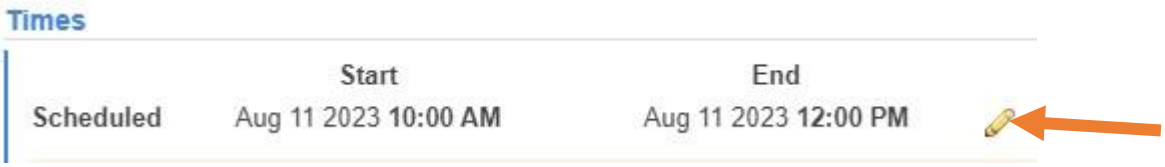
Select the desired session by clicking and dragging.



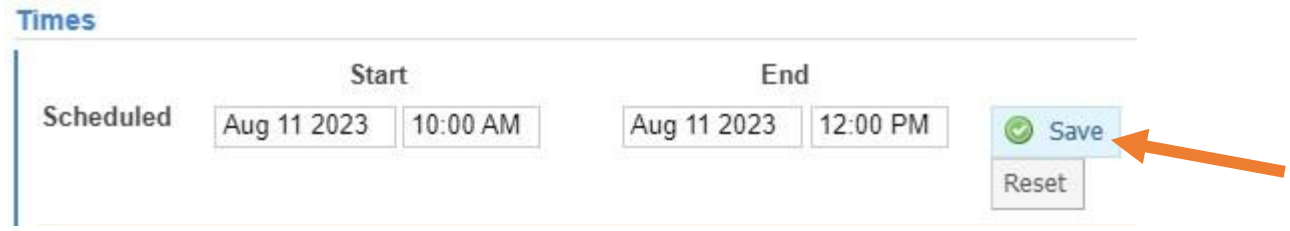
Each session will have a minimum duration. For example, the reservation session duration is 2 hours. If you have selected less than the session minimum, you will see an error message and iLab will automatically adjust it to the minimum for you.

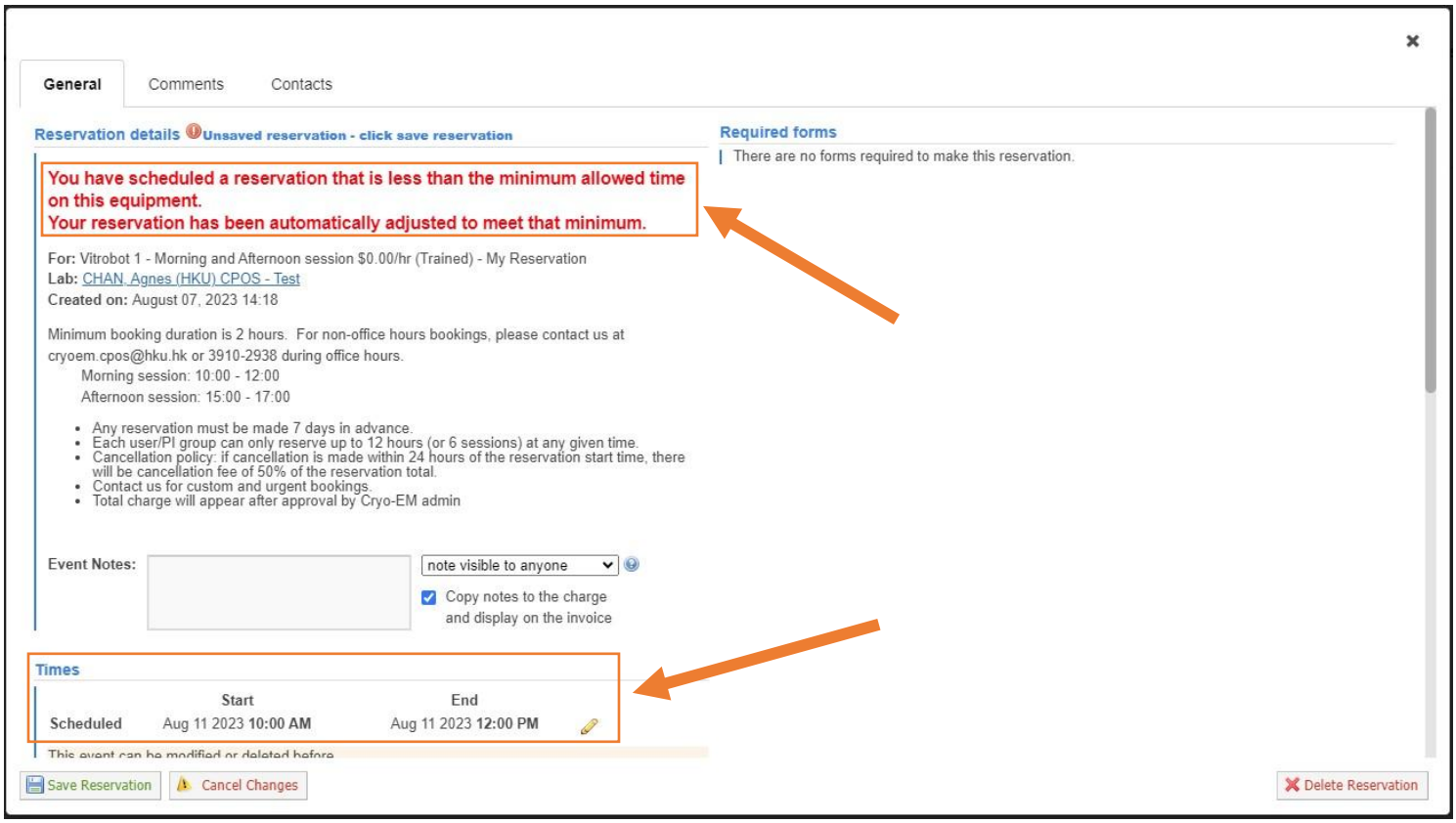


If the selected time is not correct, you can always click the “yellow pencil” to adjust the time accordingly.



Remember to click Save to confirm the time.



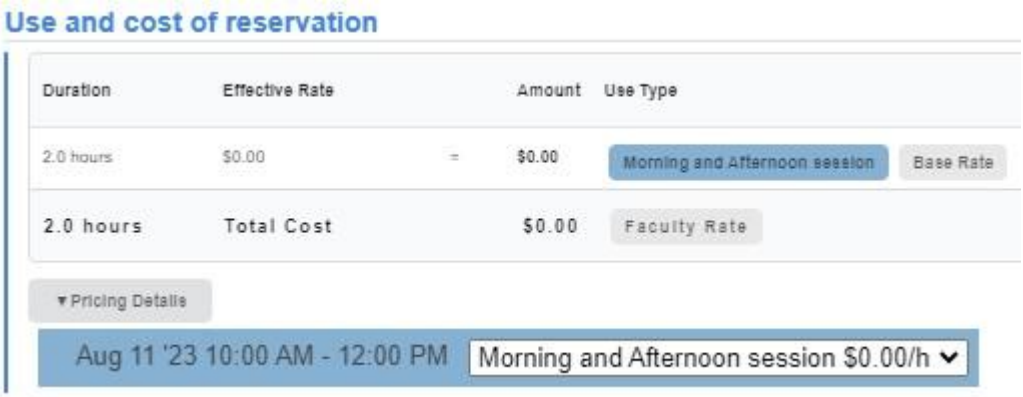


Read the reservation policy, especially the cancellation policy and confirm all details.

Each user will have a maximum number of hours of reserving a particular equipment (Capped amount) at any time. For example, each user can only reserve up to 6 sessions (or 12 hours) at any given time.



Important: Note that no charges will appear at this stage.



Last but not least, please make sure you put in the HKU billing account number. This account is to be charged to on a monthly basis for any charges incurred. Ask you PI for the billing account number before making a reservation.



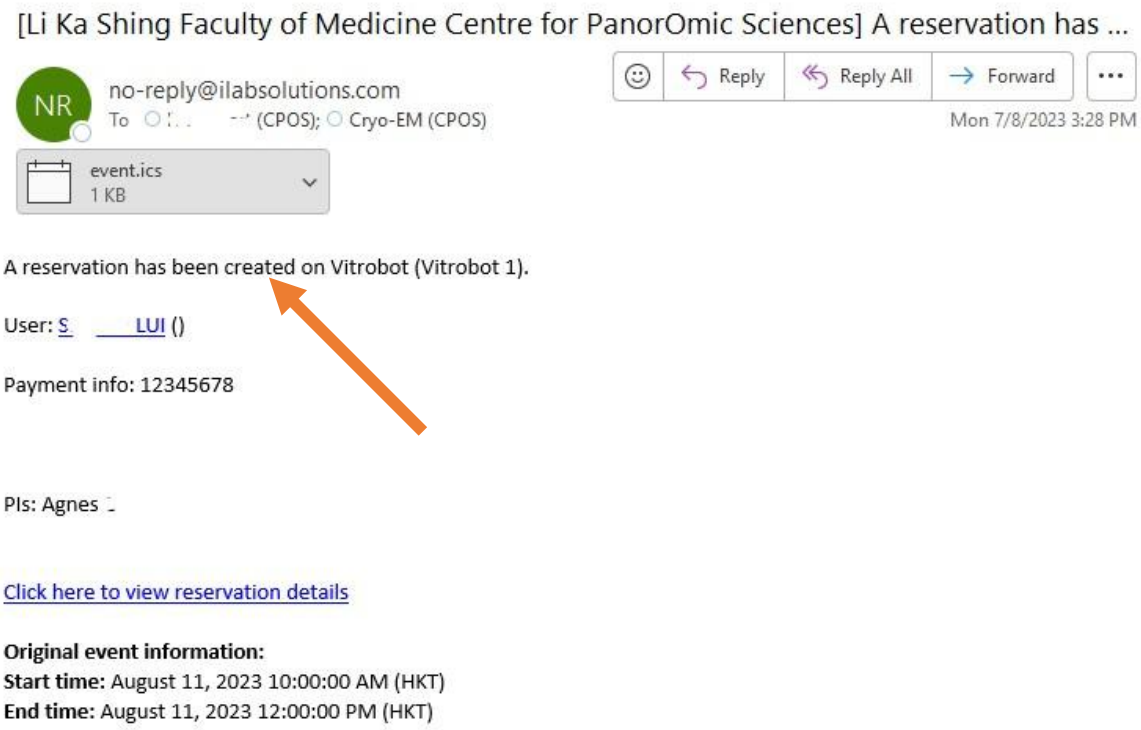
To keep your PI aware of such reservation, you may add the email address of your PI in the box.



Click 

to make the reservation.

An email (with outlook calendar event attachment) will then be sent to you on the reservation. Double click the event.ics in outlook to add to your calendar.


[Li Ka Shing Faculty of Medicine Centre for PanorOmic Sciences] A reservation has ...

Reply | Reply All | Forward

NR no-reply@ilabsolutions.com
To (CPOS); Cryo-EM (CPOS)
Mon 7/8/2023 3:28 PM

event.ics
1 KB

A reservation has been created on Vitrobot (Vitrobot 1).

User: S LUI ()

Payment info: 12345678

PIs: Agnes

Click here to view reservation details

Original event information:
Start time: August 11, 2023 10:00:00 AM (HKT)
End time: August 11, 2023 12:00:00 PM (HKT)

When Cryo-EM team receives your reservation request, charges will be updated based on standard charge subject to faculty subsidy, if applicable. When you receive another similar email, which informs you of the reservation that has been updated, you can login into iLab and check the total charges for the reservation.


[Li Ka Shing Faculty of Medicine Centre for PanorOmic Sciences] A reservation has ...

Reply | Reply All | Forward

NR no-reply@ilabsolutions.com
To (CPOS)
Mon 7/8/2023 3:51 PM

event.ics
1 KB

A reservation has been updated on Vitrobot (Vitrobot 1).

User: ()

Payment info: 1234567890

PIs: Agnes

Click here to view reservation details

Original event information:
Start time: August 11, 2023 03:00:00 PM (HKT)
End time: August 11, 2023 05:00:00 PM (HKT)

You may click the link in the email to go directly to the reservation details or you can login to iLab (https://au.ilab.agilent.com/service_center/4486/?tab=about) and double click to open the reservation in Calendar view. You shall see the service charge added. Contact CryoEM Team for assistance if needed.

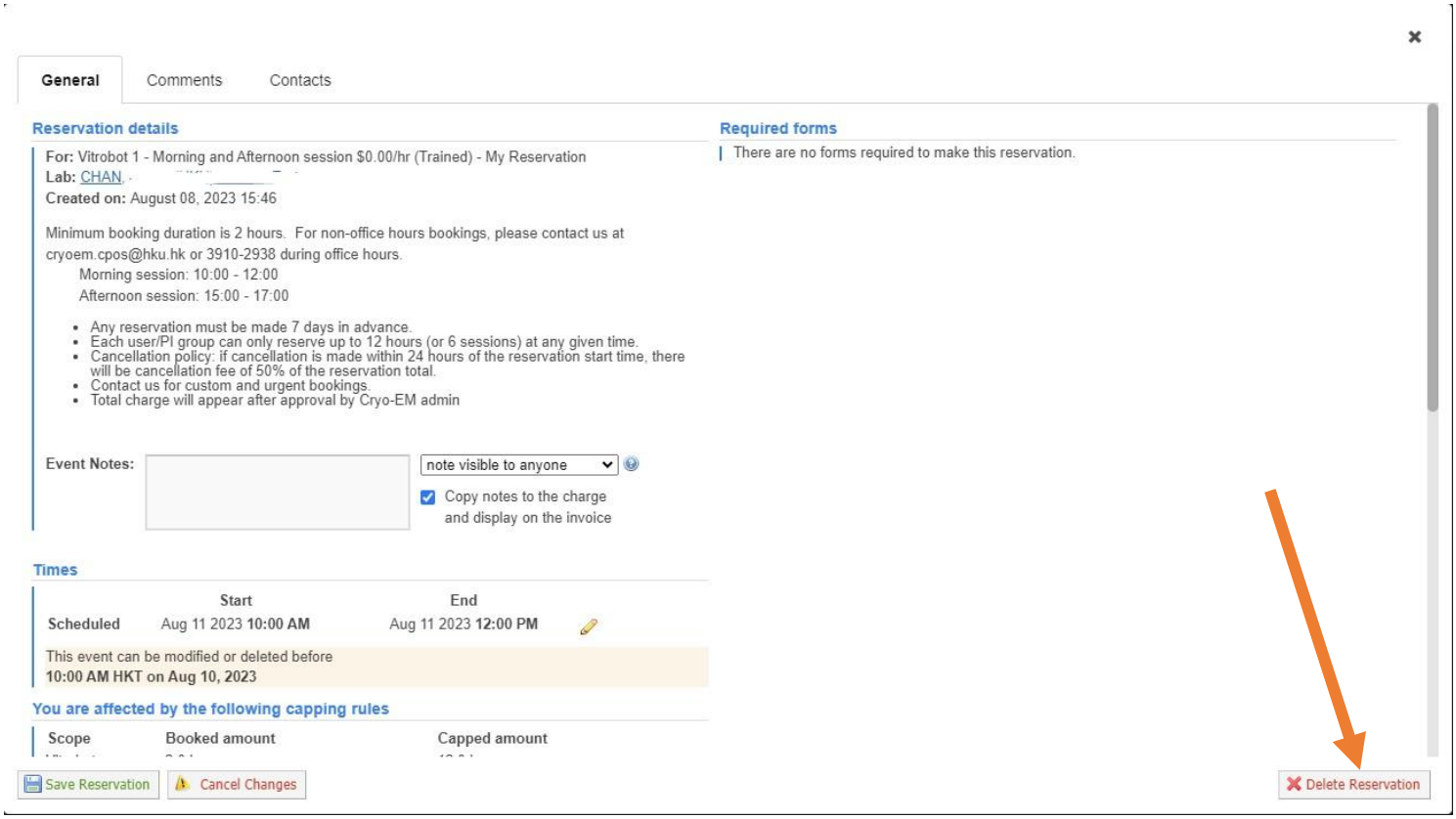


Invoices will be generated and sent to PIs each month.

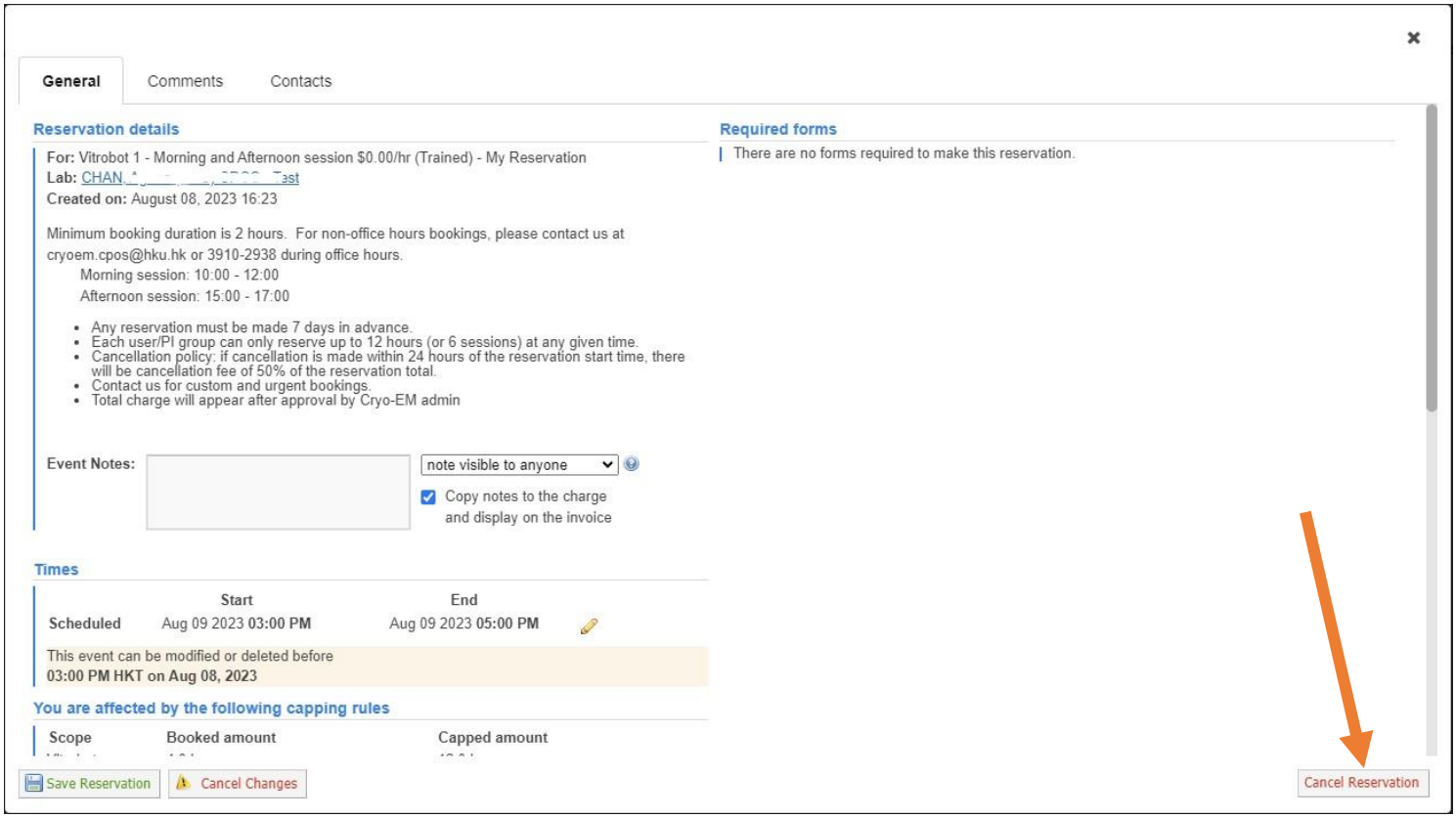
Cancelling and Deleting Reservation

Based on the cancellation policy, if a reservation is cancelled within 24 hours of the reserved start time, there will be a 50% cancellation fee.

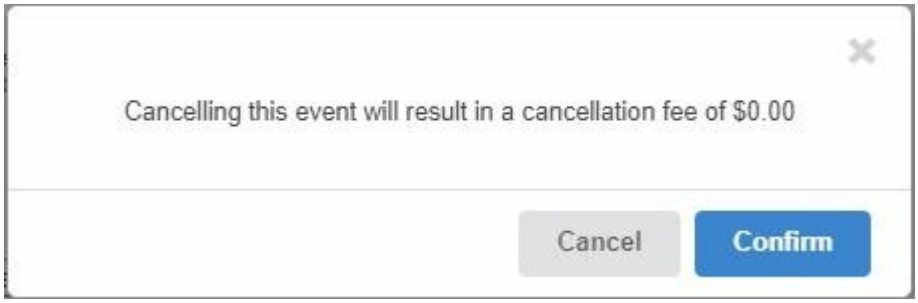
If you would like to cancel/delete a reservation at least 24 hours before the reservation start time. Just go back to the reservation and click Delete Reservation.



You can only “cancel” but not “delete” a reservation if the reservation start time is within 24 hours of the start time.



You will be prompted with the following message. Please just click Confirm and **IGNORE** the cancellation fee of $0.00 message since the actual cancellation fee will be calculated when the invoice is generated by end of the month. If you have any query on the actual cancellation fee, please contact CryoEM team.



A deleted reservation will no longer appear in the calendar while a cancelled reservation will still show up. Cancelled or deleted reservation allow other user to make new reservation.

End of Document