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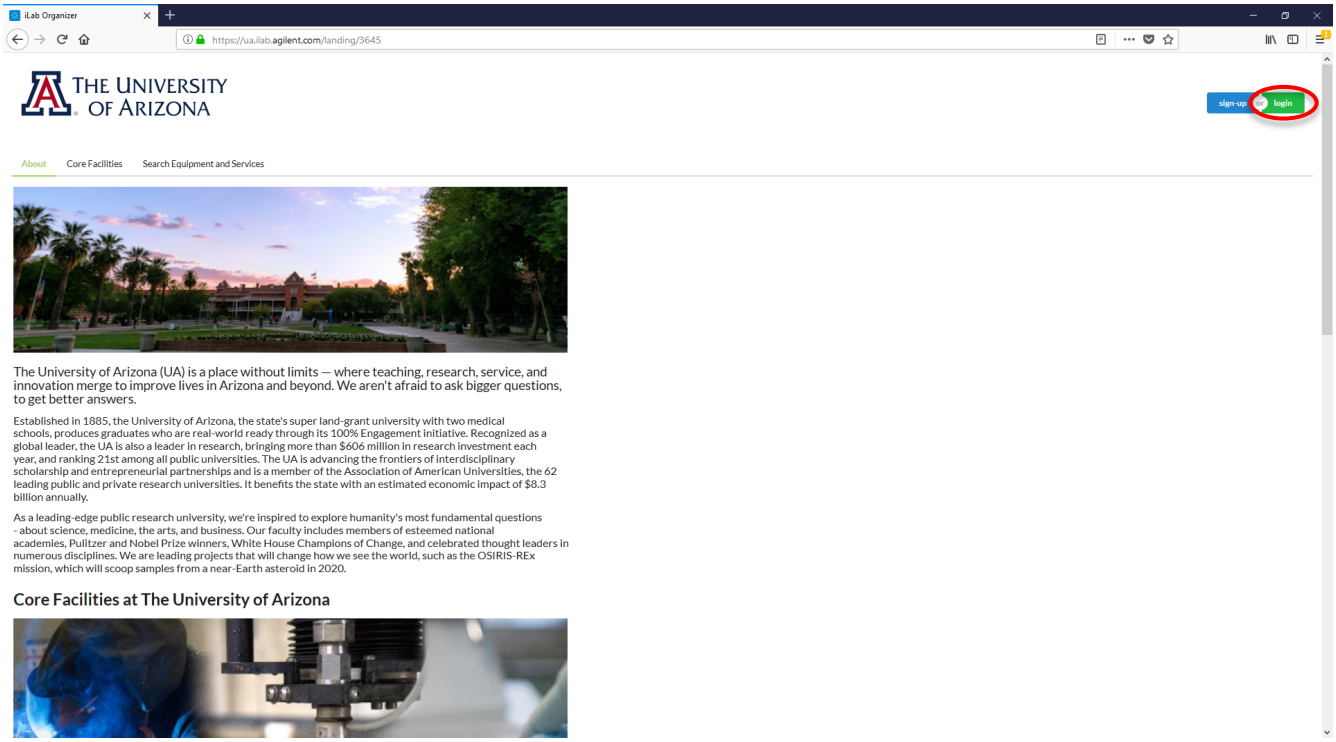
Overview & Registration

As of [Date], [Core] is excited to begin using iLab - an online system to streamline the process of ordering services and scheduling instrumentation within core facilities. As of August, 2018 the Analytical & Biological Mass Spec, Flow Cytometry Shared Resource, Functional Genomics Core, Imaging Cores: Kuiper, Life Sciences North and Marley, Molecular Structures Core, Translational Bioimaging Resource (including the Cancer Imaging Shared Resource), and the UA Genetics Core are already utilizing this new system, with many more to follow in 2018 and beyond.

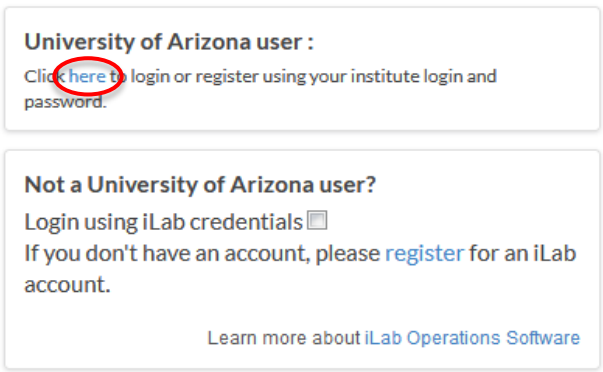
Users of these facilities are advised to familiarize themselves with the new system, which requires a one-time free registration, as described below. If you are a named PI on a current Sponsored Project Account in UAccess Financials you have already been registered for an iLab account. Even if you do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

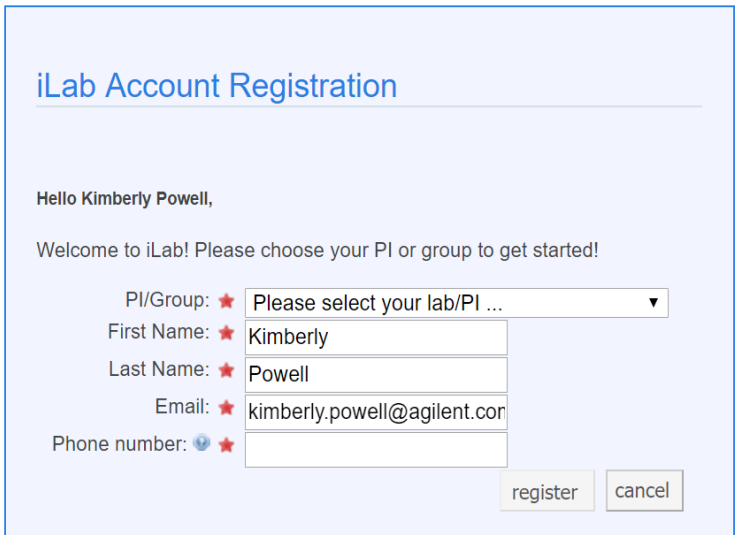


3. You will be directed to the WebAuth page where you will need to enter your NetID credentials and click the LOGIN button.

4. If you are setup for two-factor authentication you will need to provide authentication via the Duo-Mobile application. This will be mandatory for most people beginning 4/3/2018, and for everyone 4/10/2018.

   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.

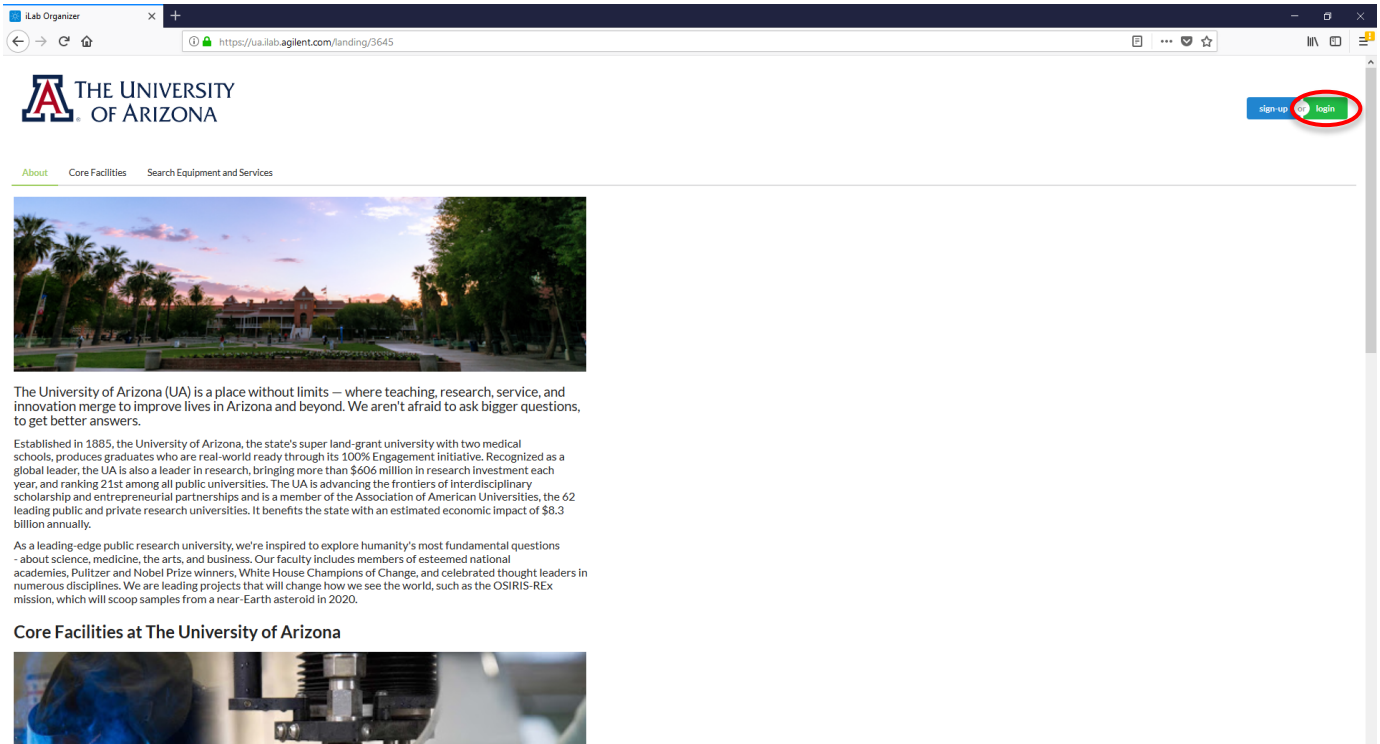


6. Once your registration has been submitted, your PI will receive a notification that you have requested membership to their lab within iLab. They will need to approve your membership and assign at least one financial account for you to be able to request services or schedule time on instrumentation.

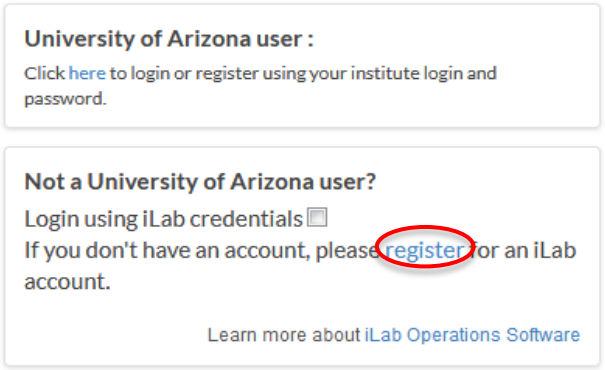
   The first time you login to iLab after being accepted into your PI's lab you will need to set your time zone. Please set this as Arizona so that you are in sync with the equipment calendars. You will also have the opportunity to set your preferred email address for messages from this system. Once you 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

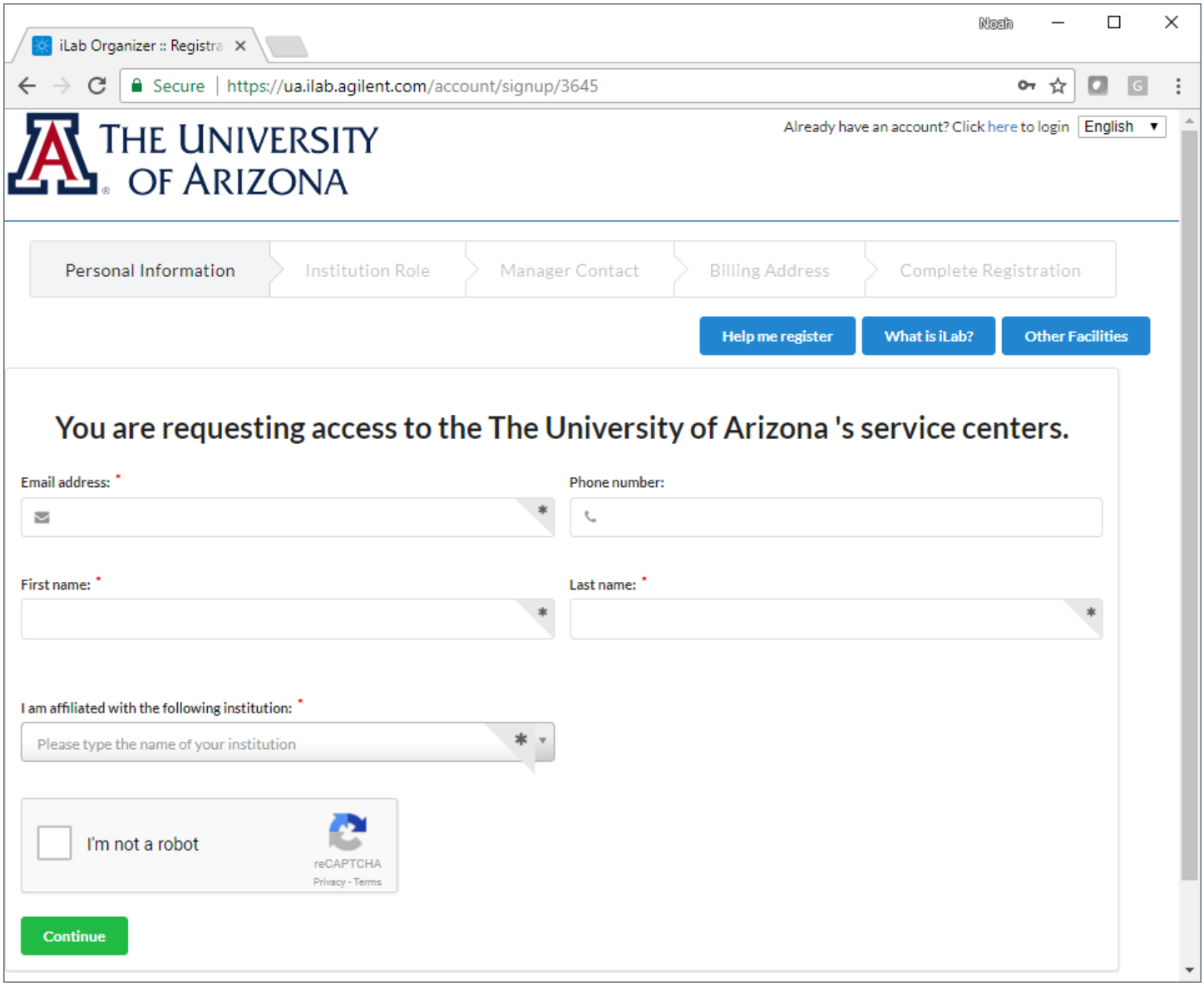
1. Navigate to the login page and click on the green "Login" button at the top right of the screen.



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



3. Complete the registration form that you are directed to. Note that there are multiple tabs to complete.



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.

Information for All Users

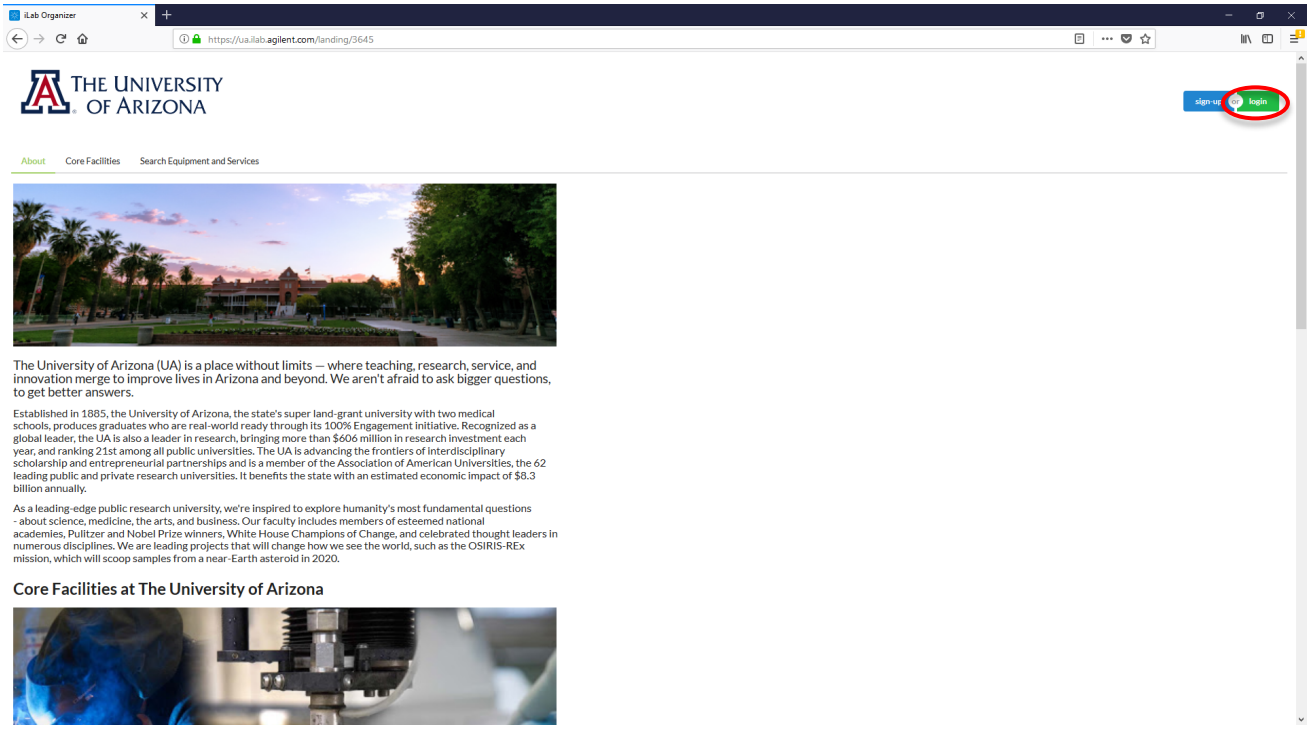
Regardless of your role in the various lab groups within iLab to which you may belong, you will need to know how to login, reserve equipment and request services within the new system. The following sections provide general step-by-step instructions on these processes. Because workflows vary from facility to facility, some cores will have minor variations in their processes that the core staff can assist you with, if necessary.

How-To Video for General User Processes

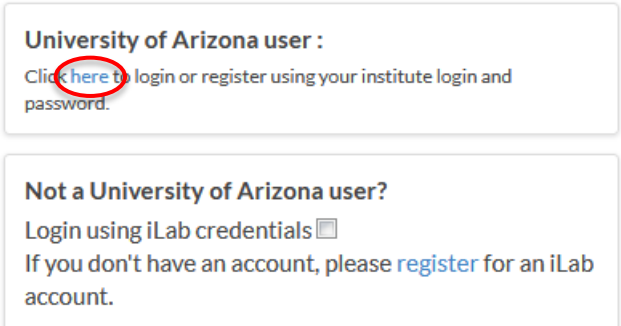
If you would like to watch a video that walks you through the processes of reserving equipment and requesting services you can do so here.

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. This will be mandatory for most people beginning 4/3/2018, and for everyone 4/10/2018.

   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.

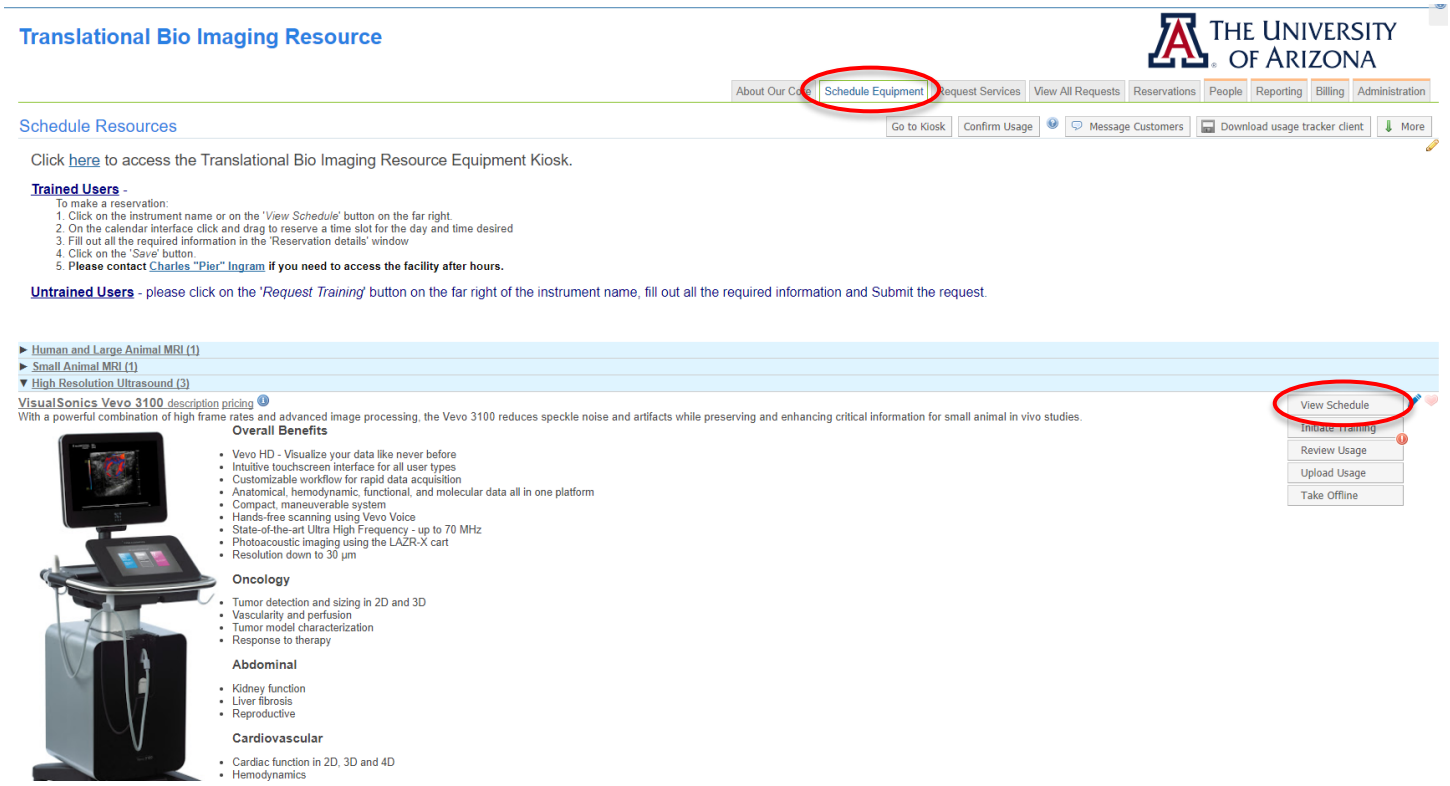
Creating an Equipment Reservation

Once you have been accepted into a lab group and assigned a UAccess Financials account number, you can schedule equipment time.

1. Login to iLab.

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. Payment information is required to schedule equipment.

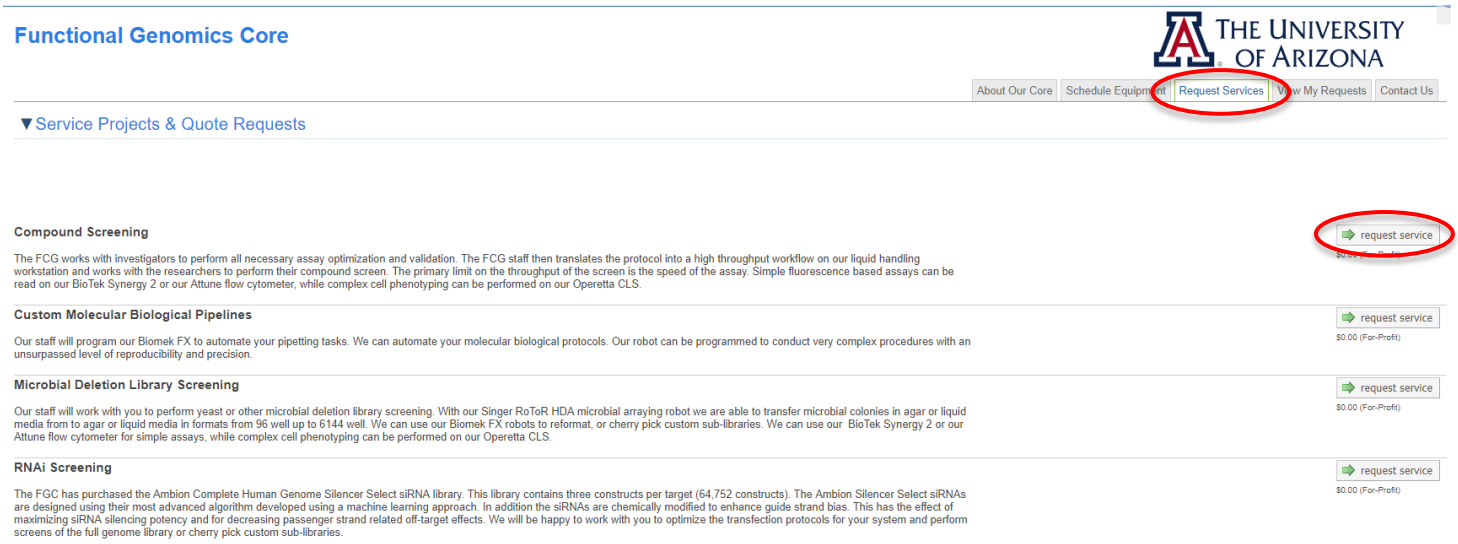
Creating a Service Request

Once you have been accepted into a lab group and assigned a UAccess Financials account number, you can create service requests.

1. Login to iLab.

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. Payment information is required to request services.

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.

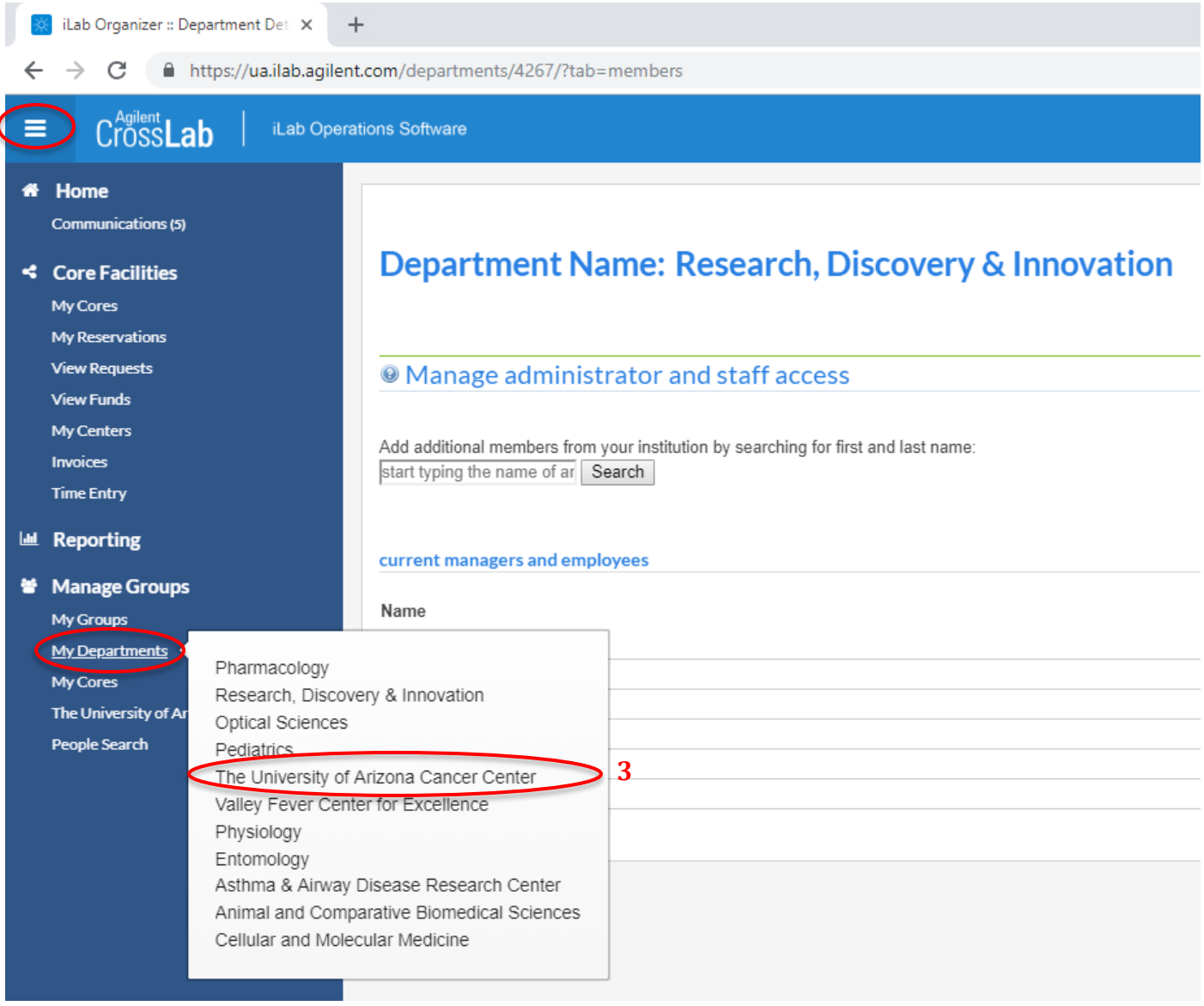
Instructions for Departments & Financial Managers Thereof

If you are a member of a business office that oversees the financial activity of multiple lab groups, or PIs, it may make sense to setup a Department for you within iLab. A Department in iLab is a construct that consists of lab groups and individuals, who are added as Financial Managers. As a Financial Manager of a Department within iLab you have the ability to review the activity and/or assist in lab management for multiple lab groups, or PIs.

Navigating to your Department

1. Once logged in (see instructions above), click the triple bar at the top left to open the navigation menu.
2. Hover over the 'My Departments' link.
3. Then click on the name of the Department you wish to manage

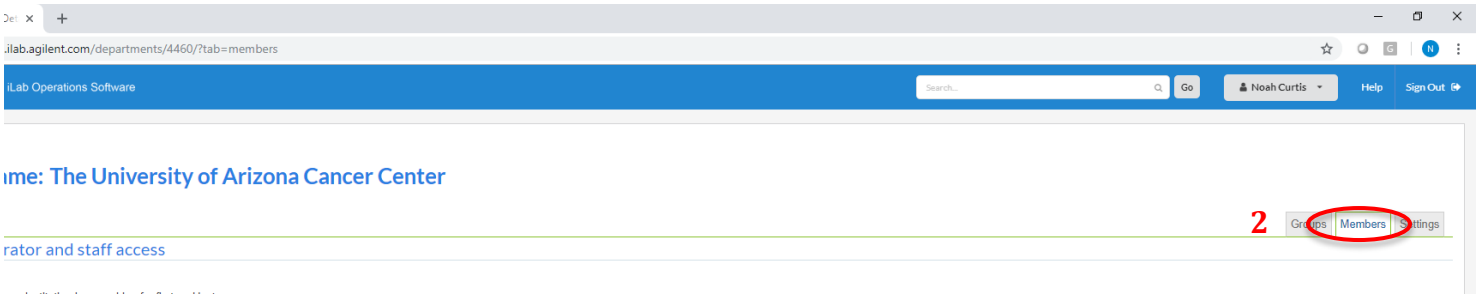
   Tip: Alternatively you can simply click the 'My Departments' link (2), and then click the hyperlinked name of the Department you want to manage.



Adding Financial Managers to Your Department

1. Once logged in navigate to your Department.

2. Click on the “Members’ tab if necessary, but this should be the default page you land on.



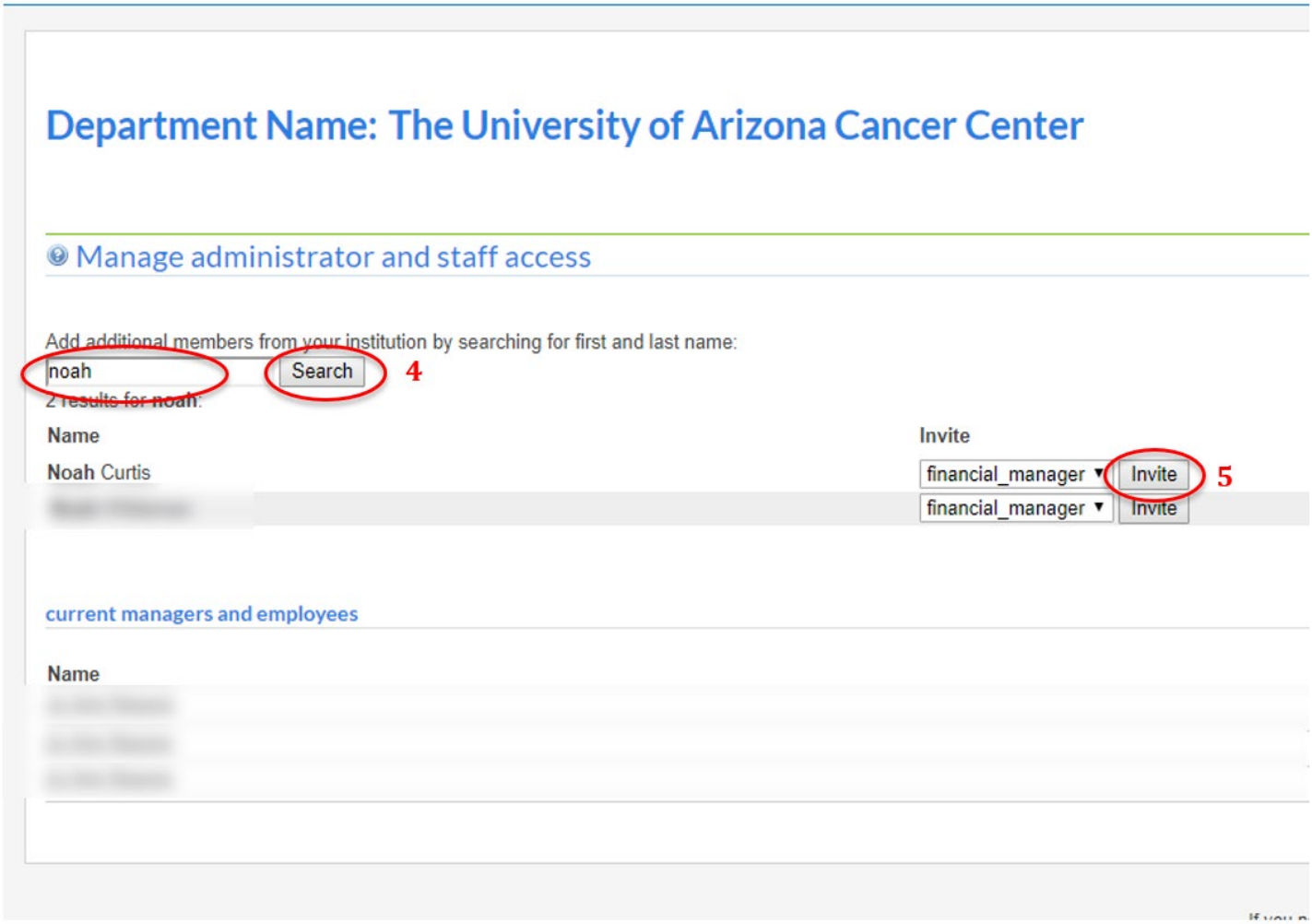
3. Type the name of an individual you wish to add as a Financial Manager for your Department into the box in the ‘Manage administrator and staff access’ section.

   Note: The lab individual naming convention is [First Name] [Last Name]. The iLab system is fed user information from WebAuth, so you will need to type the individual’s name in as it appears there.

4. Click on the ‘Search’ button.

5. Click the ‘Invite’ button in-line with the individual who you wish to add as a Financial Manager.

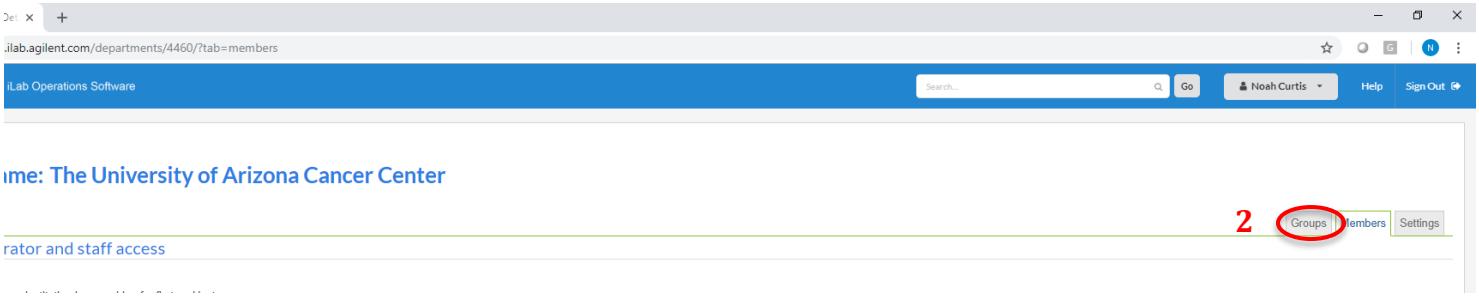
   Note: Only the role Financial Manager is available within Departments for our iLab integration.



Adding Lab Groups to Your Department

1. Once logged in navigate to your Department.

2. Click on the “Groups’ tab.

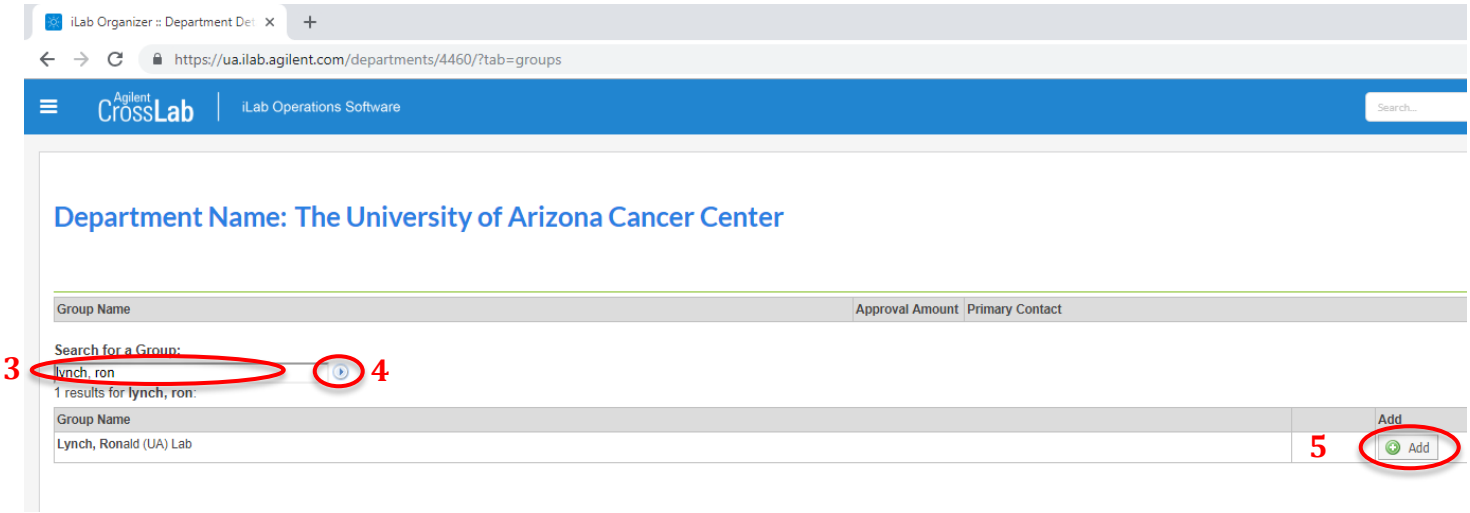


3. Type the name of a lab group you wish to add to your Department into the ‘Search for a Group:’ box.

   Note: The lab group naming convention is “[Last Name], [First Name] (UA) Lab.” Remember the iLab system is fed user information from WebAuth, so lab group names will be based on how the PI’s name appears in that directory.

4. Click on the round button with the “Play” symbol to the right of the ‘Search for a Group:’ box.

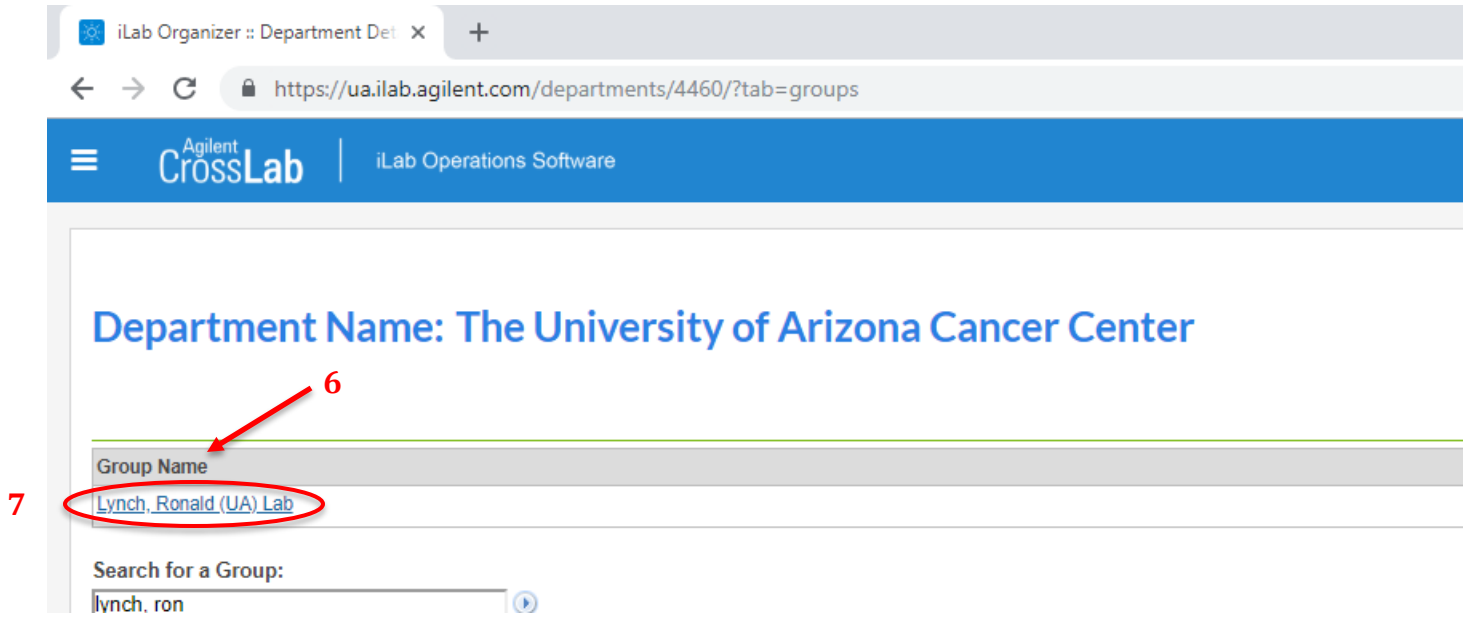
5. Click the ‘Add’ button in-line with the lab group you wish to add to the Department.



6. The lab group will now be listed under the ‘Group Name’ section at the top of the page.

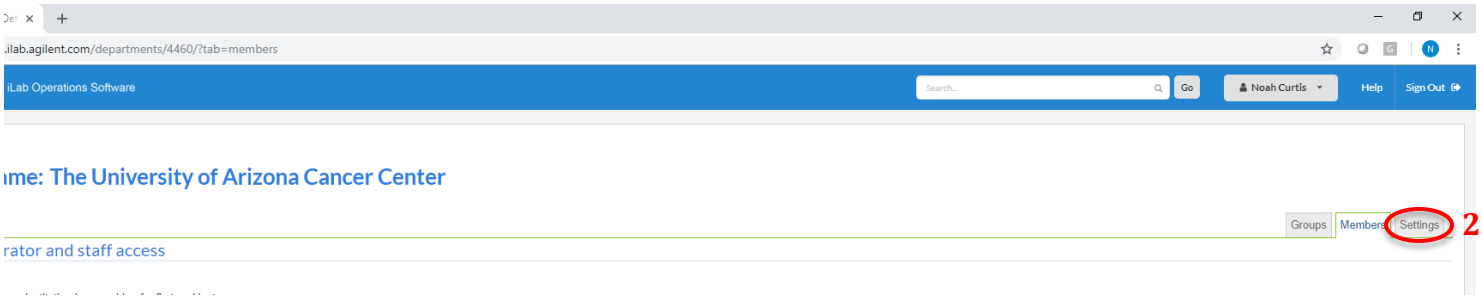
7. You can now navigate into the lab groups within your department by clicking on their hyperlinked names.

8. Once you have navigated into a lab group you are able to perform all of the tasks a Lab Manager for that group would be able to perform. See the following section of this document Instructions for PIs and Lab Managers for instructions on how to perform specific tasks within the lab groups.



Adjusting the Settings for Your Department

1. Once logged in navigate to your Department.
2. Click on the “Settings’ tab.



3. Check this box to allow additional labs to be added to your Department.
4. Check this box if Department Managers should receive emails when service requests created by the members of lab groups within the Department require approval.
5. Check this box if only Department Managers should receive emails when service requests created by the members of lab groups within the Department require approval.
6. Check this box if Department Managers should receive emails regarding individuals requesting membership to the lab groups within the Department.
7. Check this box if only Department Managers should receive emails regarding individuals requesting membership to the lab groups within the Department.
8. Check this box if the Department Manager should be the primary contact for invoices.
9. Select the individual from amongst all the Department Managers to be designated as the primary contact for invoices.
10. Don’t forget to save your changes!

ty of Arizona Cancer Center

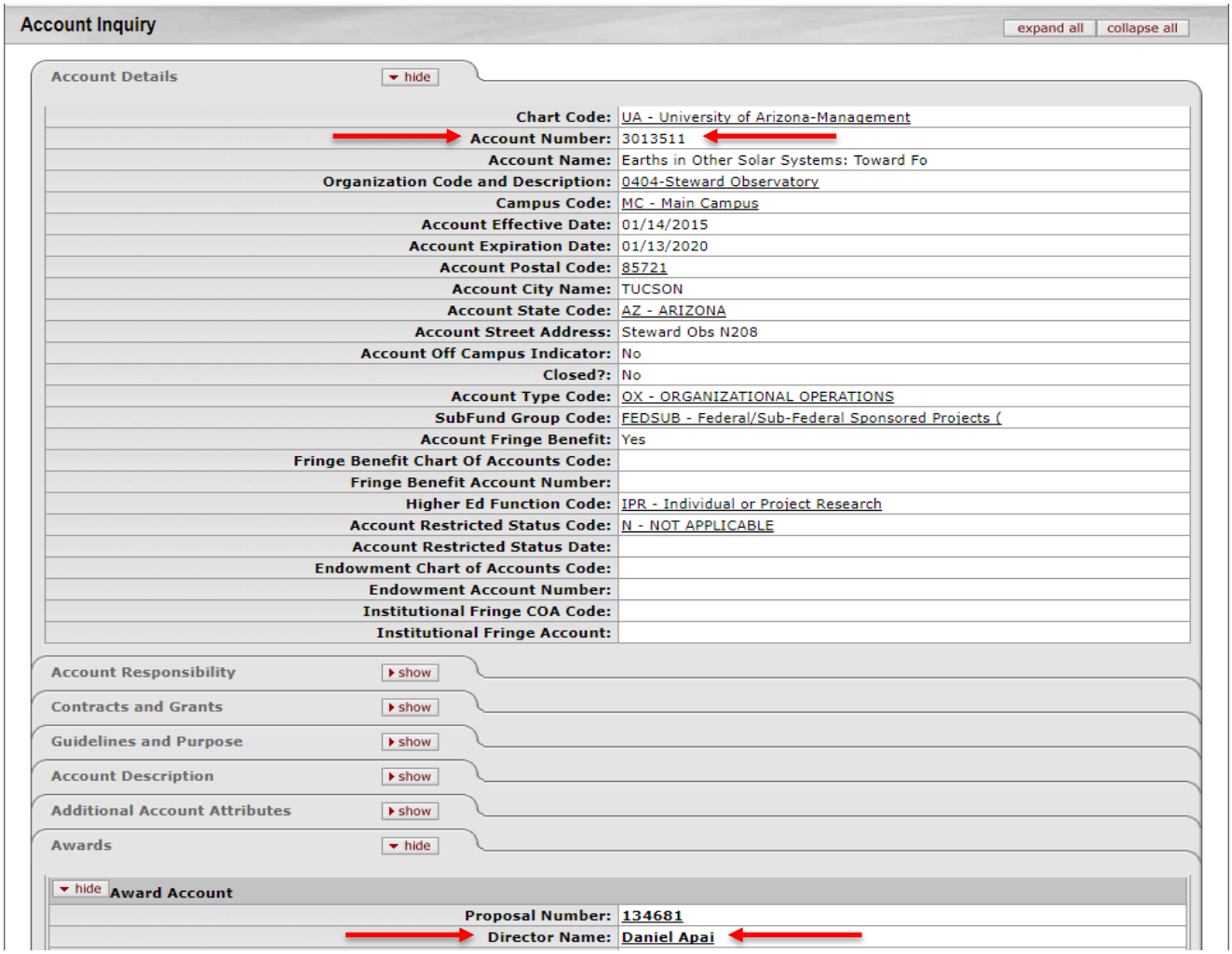
Instructions for PIs and Lab Managers

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. If you are designated as a PI or Manager for a lab group in iLab 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 are a PI and would prefer to delegate these responsibilities to a Lab Manager, please email ilab-support@agilent.com or corebusiness@email.arizona.edu with your lab manager's name & email address request they be designated as a manager in your lab.

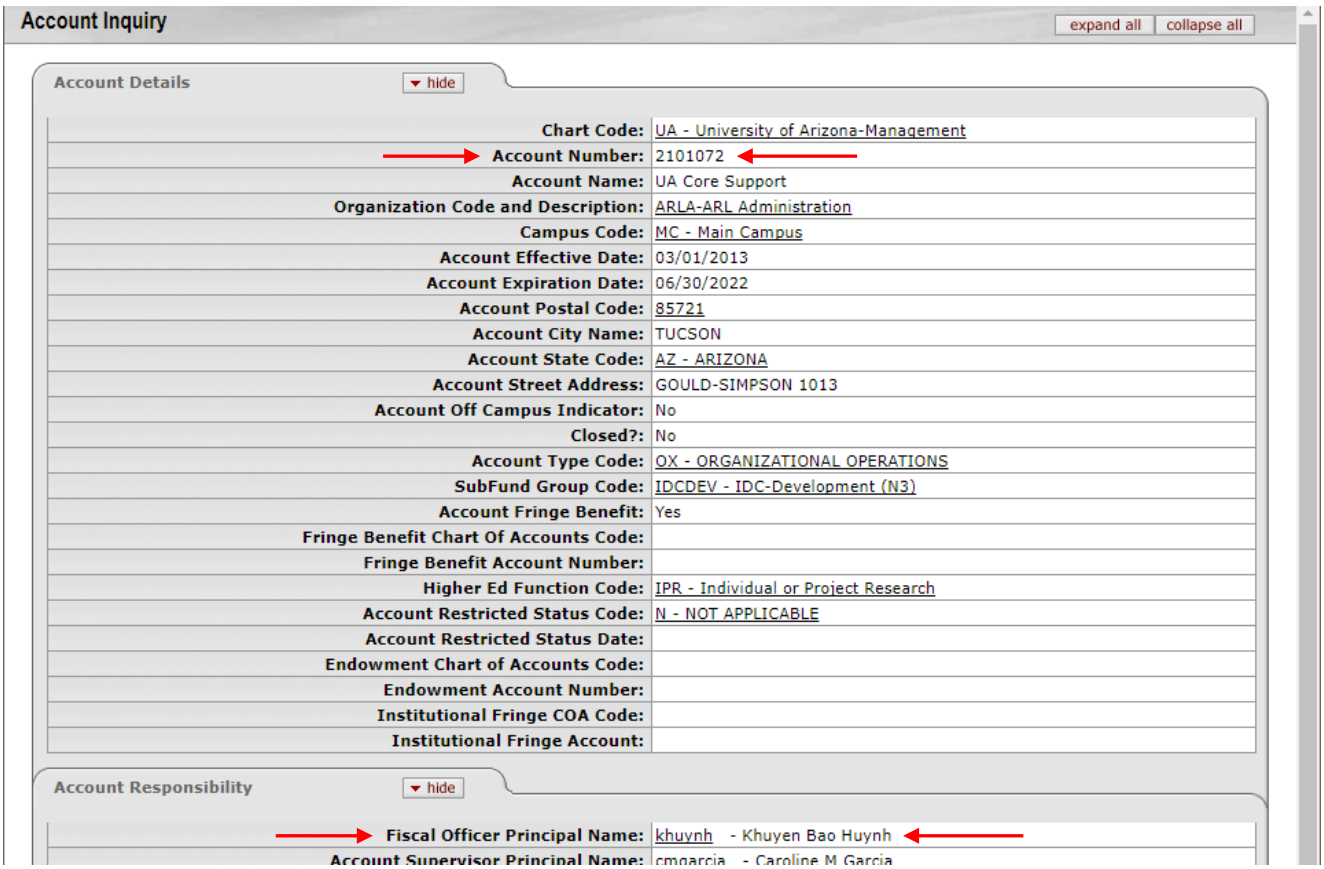
Getting your lab group established in iLab can take time, especially if you have non-sponsored UAccess Financials Accounts that will need to be added to your lab group (i.e. accounts beginning in a 1, 2 or 5). We recommend that you begin this process immediately, even if the facility or facilities you 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.

How Does iLab Recognize Financial Account Owners?

There are two ways that iLab could designate you as an account owner. Each of these is dependent upon one of two specific fields within UAccess Financials. iLab will look to one and only one of these two fields for each account in UAccess Financials in order to determine the owner for that account. If the account in question is related to a Sponsored Project (i.e. a 3 or 4 series account), then iLab will determine the owner based on the individual named within the Director Name field in the Award Account section of the Awards tab in the Account Inquiry screen within UAccess Financials.



For all other accounts (and account-subaccount pairs) iLab will determine the owner based on the individual named within the Fiscal Officer Principal Name field in the Account Responsibility tab in the Account Inquiry screen within UAccess Financials.



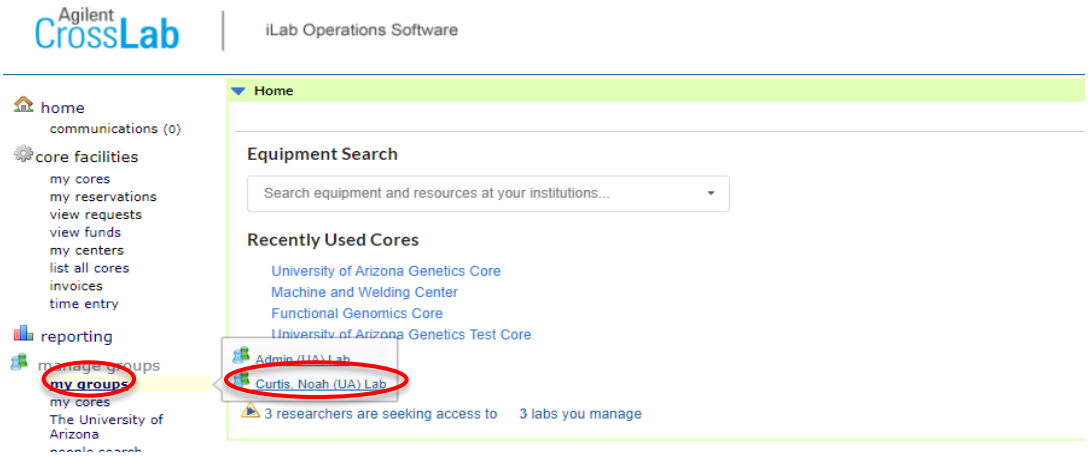
How Does iLab Identify PIs and Create Their Lab Groups?

Individuals named as Directors on Sponsored Projects accounts are designated as PIs by iLab (see first screenshot under the section How Does iLab Recognize Account Owners? To see where in UAccess Financials you may be named as Director). The iLab system will consequently create a lab group for each of these individuals, automatically register them in iLab, and place their registration within their lab group.

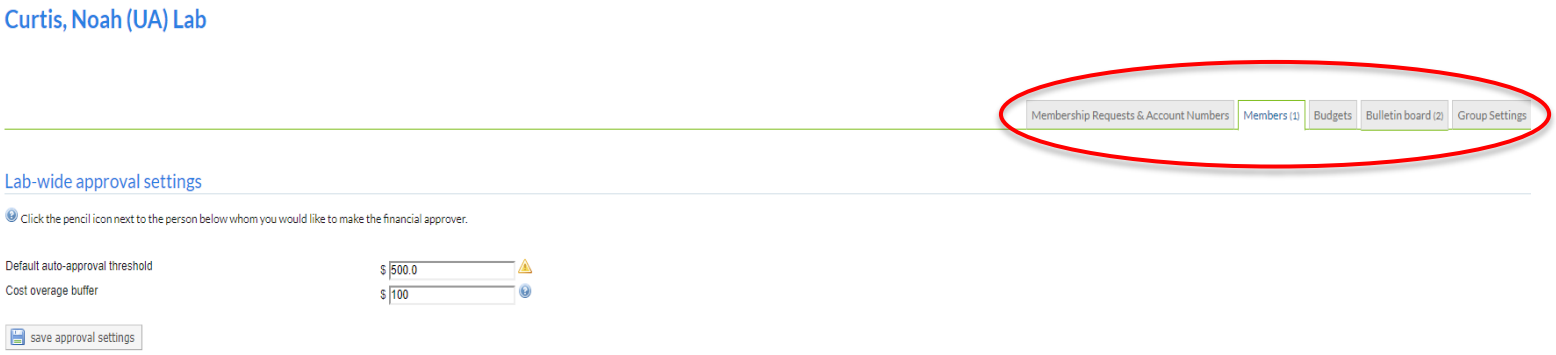
It is important to note that anyone with an iLab account can have a lab group manually established in the iLab system, with them set as the PI. Requests to have a lab group manually established with you as the PI can be sent via email to Core Business office at corebusiness@email.arizona.edu. However, in order to access equipment or services within iLab, this lab group will require at least one non-expired UAccess Financials account. See the section Adding UAccess Financial Accounts to Your Lab Group for step-by-step instructions on how to request access to funds that are not automatically placed in your lab group by the iLab system. These requests will be routed by iLab to the owner of that account, as defined in the section How Does iLab Recognize Account Owners?.

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.

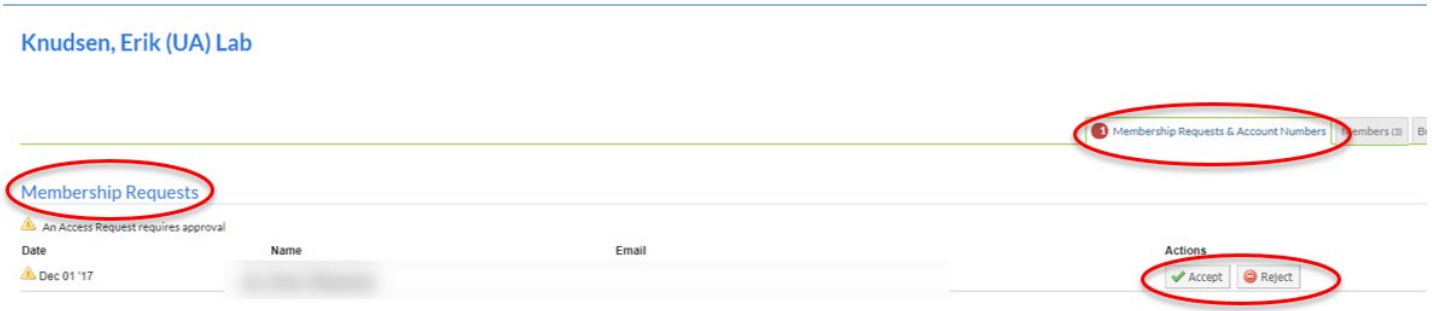


Approving Lab Membership Requests

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

12. Click on the "Membership Requests & Account Numbers' tab. Membership requests will show at the top of this page, under the 'Membership Requests' section.

13. Click 'Accept' if the individual requesting membership belongs to your lab group. Click 'Reject,' if the individual does not belong to your lab group.



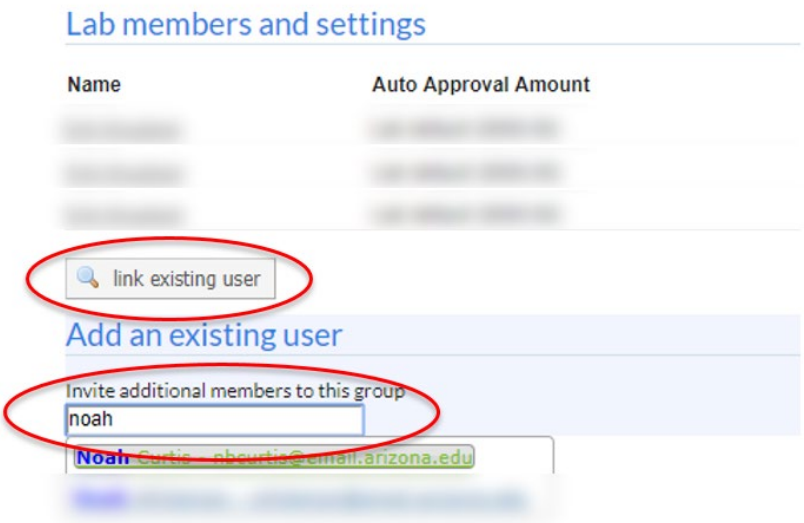
Adding Lab Members Already Registered in iLab

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 even full 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.

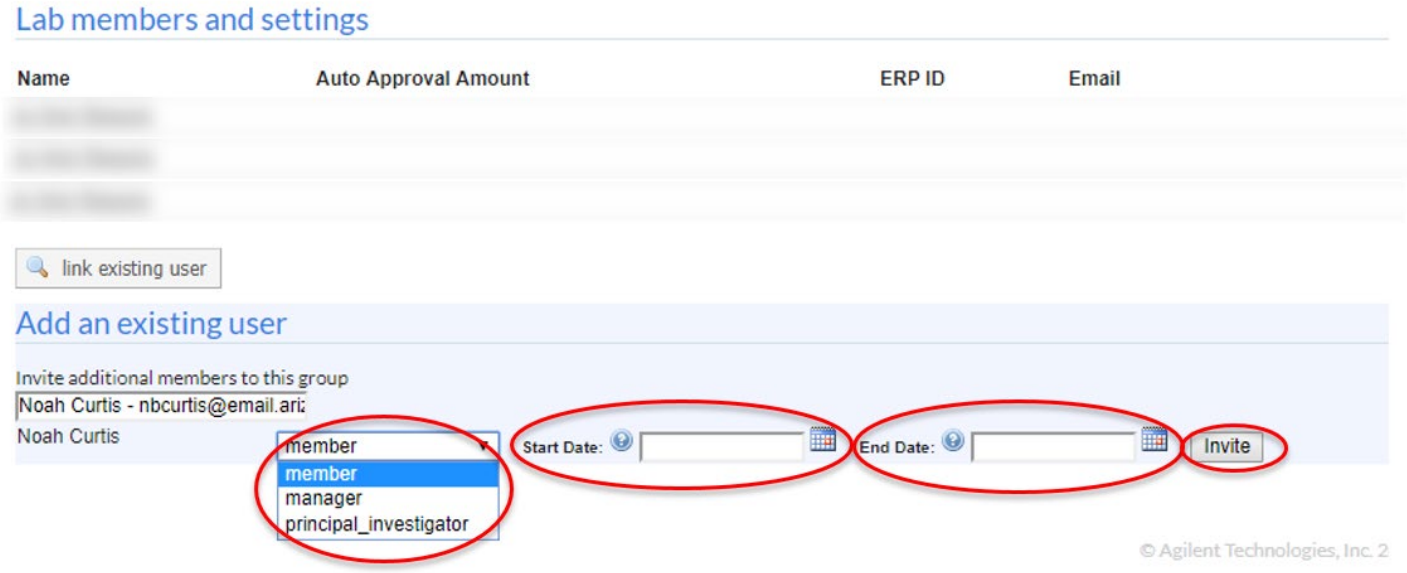


4. Select the membership role you wish to assign this individual from the dropdown menu (i.e. member, manager or principal_investigator).

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

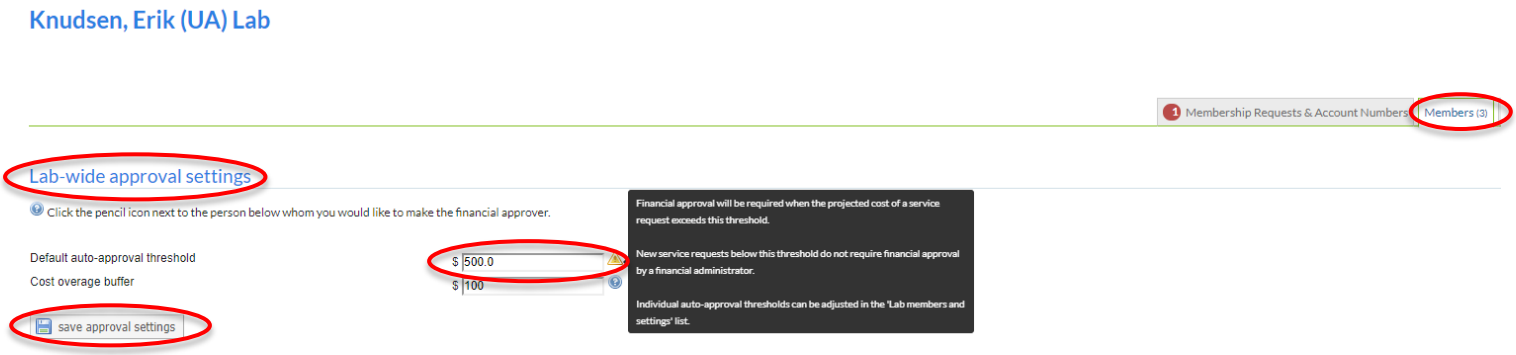
6. Set an 'End Date' if you wish to provision the individual until a specific future date.

7. Click the 'Invite' button.



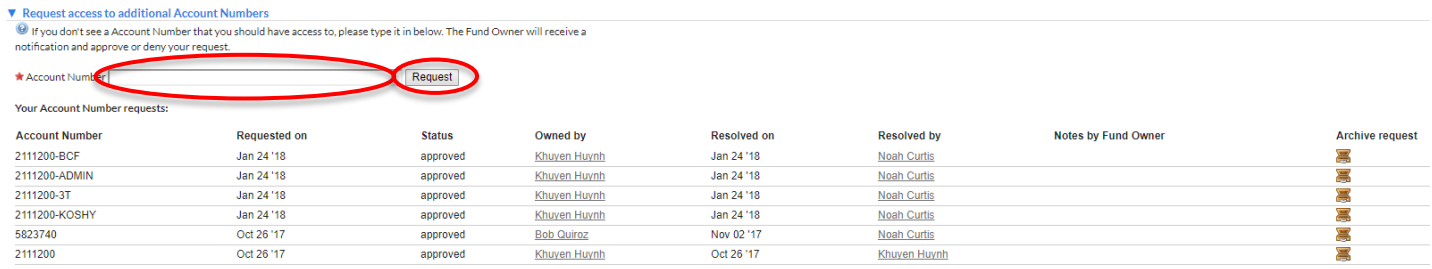
Adjusting Auto-Approval Financial Thresholds for Your Entire Lab

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.
4. Click 'save approval settings' when you have the values you wish to apply to your lab.



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 account's owner as defined in the section How Does iLab Recognize Account Owners?.
5. Once approved by the account owner the members of the lab group will need to be granted access to use the new account (see Granting UAccess Financial Account Access to Lab Members).

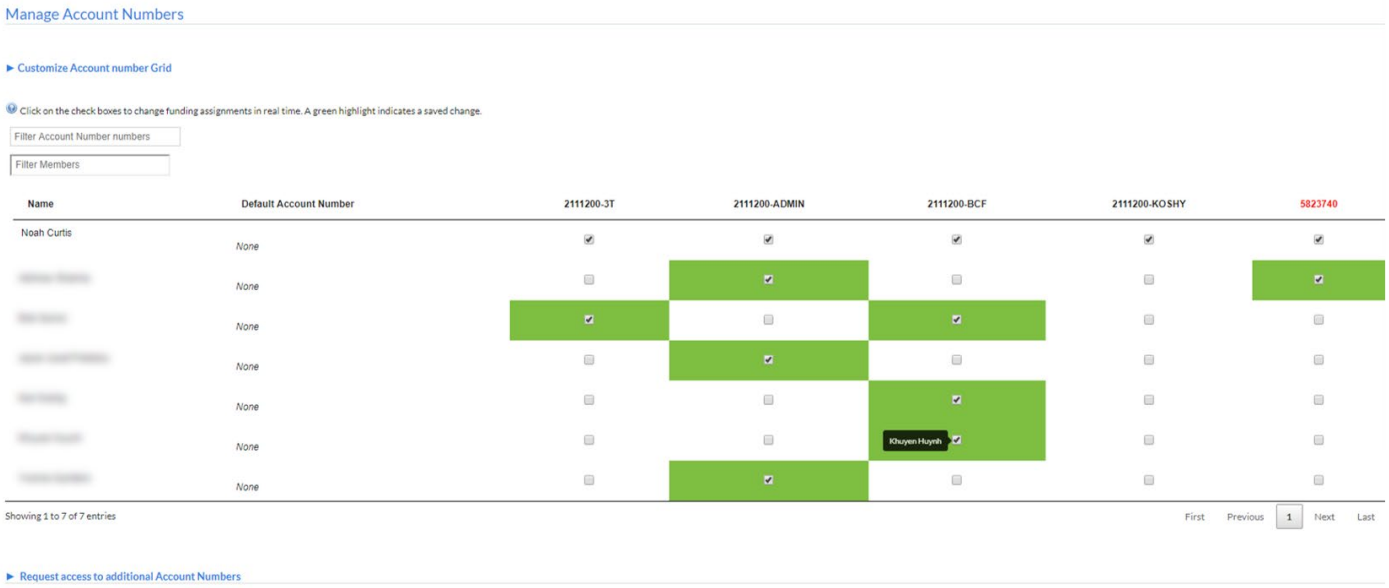


Granting UAccess Financial Account Access to Lab Members

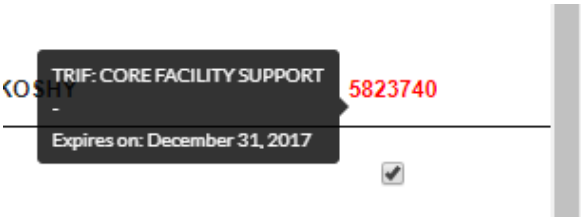
1. Navigate to the 'Membership Requests & Account Number(s)' tab (see above).
2. Find the member in the list under 'Manage Account Number(s)' section.

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.

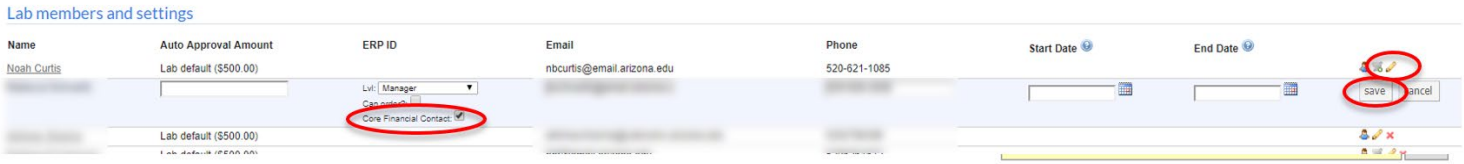


Tip: If you hover your mouse over an account number in the grid the system will display the account name, award number and expiration date for that account.

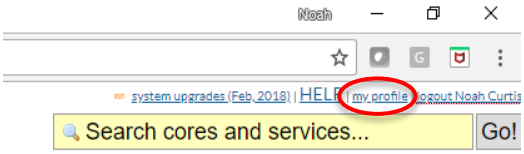


Designating a Core Financial Contact for Your Lab Group

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 make this designation.
3. In the 'Lab members and settings' section click on the little yellow pencil on the right side of the screen for the individual you would like to make a Core Financial Contact.
4. Check the box next to the words "Core Financial Contact."
5. Click the Save button on the right to save the changes for this lab member.
6. This individual can now be directly copied when invoices are issued from core facilities in iLab.



Tip: If you want invoices sent to a departmental email account, or distribution list, a person designated as a Core Financial Contact can change their email address to that departmental or distribution account using the 'my profile' link in the top right of the iLab software interface.



Instructions for Account Owners

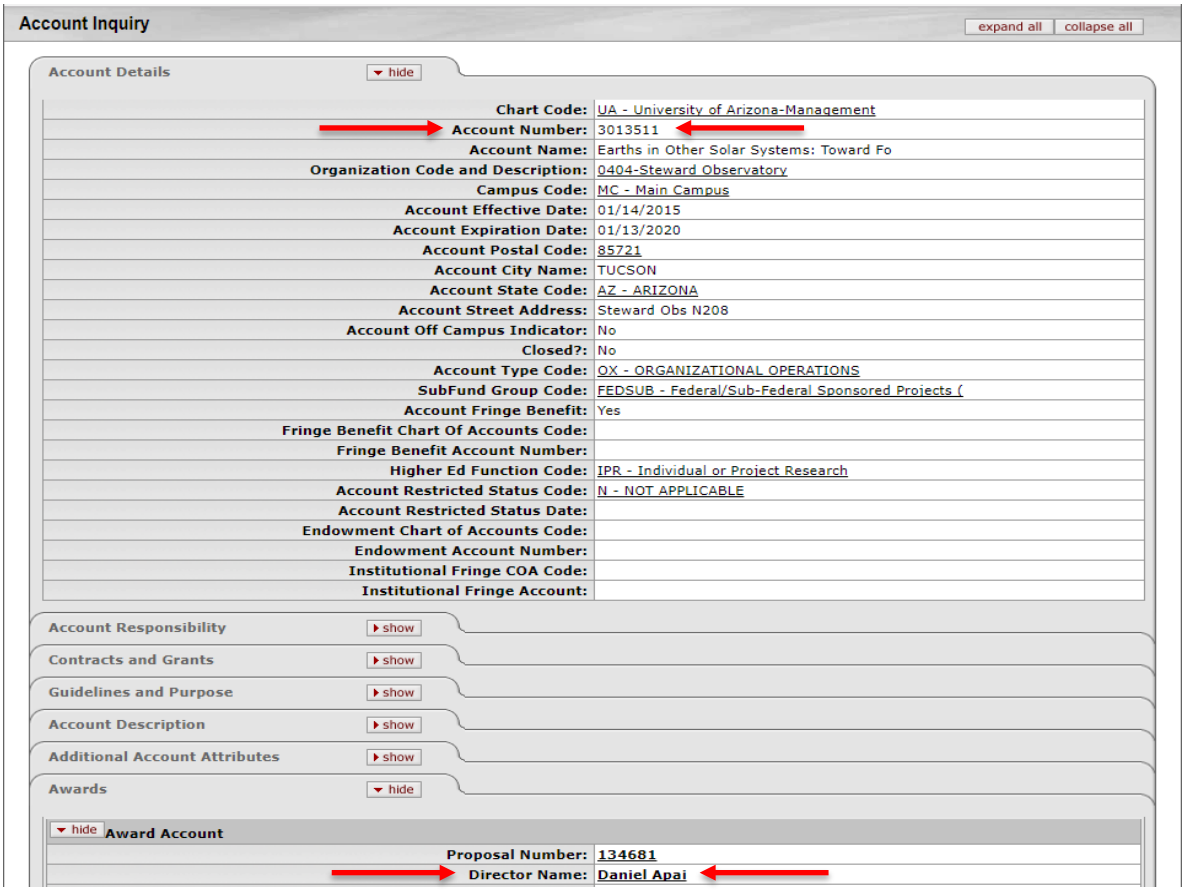
iLab is a billing system that integrates directly with UAccess Financials in addition to being a service request and calendaring system. Given this fact there are a series of validations and approval steps that must be completed prior to allowing individuals to place charges against a UAccess Financials Account. Each night iLab is updated with the most current UAccess Financials Account information including account number, account name, expiration date, fiscal officer information, as well as director information (i.e. PI) and award number for Sponsored Projects accounts. This feed ensures that the accounts in the iLab system are unexpired and valid for use by University of Arizona researchers.

> Note: iLab will not allow individuals to place orders for any goods or services against an expired account. For Sponsored Projects accounts that will be continued PIs should work with their business office to get their accounts extended on backstop if they will need to continue using those accounts in iLab while waiting for their next year's funding to arrive.

Once validated as current, and entered into the iLab system, there are two approval steps that must take place, in this order, before a financial account can be used by an individual in the system:

1. Approval to place the account within a lab group:

   a. Automatic Approval: For Sponsored Projects accounts (i.e. accounts beginning with a 3 or 4) this approval is granted by default for any lab group in which the individual named within the Director Name field in the Award Account section of the Awards tab in the Account Inquiry screen within UAccess Financials is designated as a PI.



   b. Accorded Approval: For instances where an account is not automatically approved to be placed into a lab group, this approval must be accorded by the owner of the account.

      iLab designates one owner per account based on data from UAccess Financials. If the account in question is related to a Sponsored Project (i.e. a 3 or 4 series account), then iLab designates the

individual named within the Director Name field in the Award Account section of the Awards tab in the Account Inquiry screen within UAccess Financials as the owner (see screenshot above). For all other accounts iLab designates the Fiscal Officer as the owner.

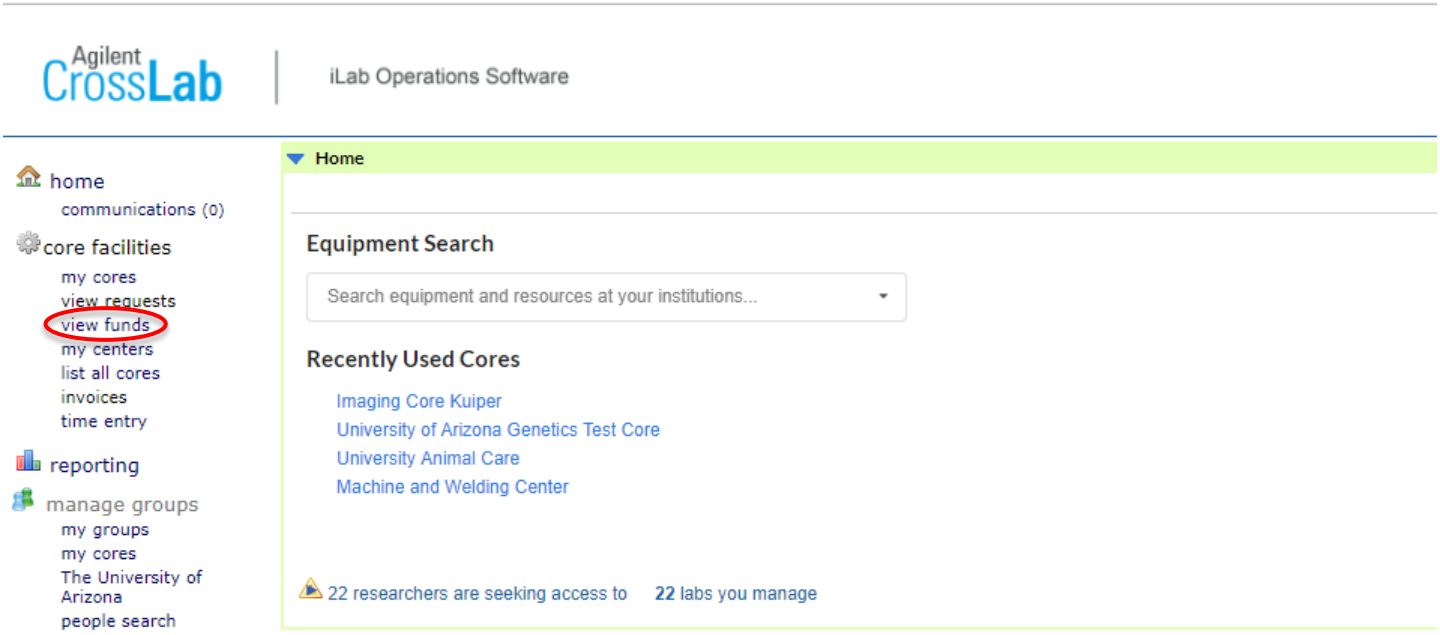
The following section of this document provides instructions on According Approval to Place a UAccess Financials Account into a Lab Group.

2. Approval by the lab group PI or manager for a member of the lab group to use that account. For instructions on how to grant this approval see Granting UAccess Financial Account Access to Lab Members.

According Approval to Place a UAccess Financials Account into a Lab Group

1. Once logged in you will need to navigate to the 'view funds' screen.

2. From anywhere in the system click on the 'view funds' link at the upper left of the screen.

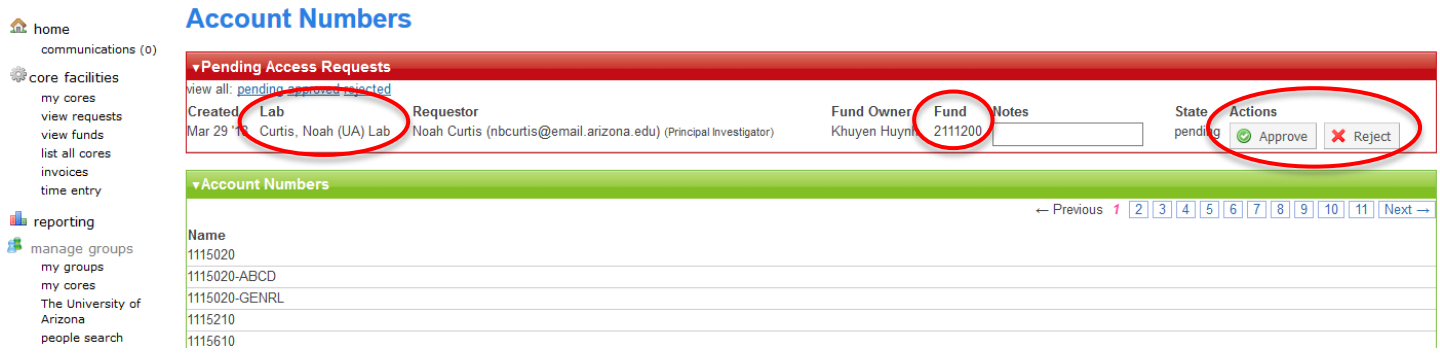


3. Review the requests listed under the Pending Access Requests section.

4. If the Lab requesting the Fund (i.e. UAccess Financials Account) should have access to the account or account-subaccount requested click 'Approve.'

5. If the Lab requesting the Fund (i.e. UAccess Financials Account) should not have access to the account or account-subaccount requested click 'Reject.'

   Tip: The Notes field to the right of the Fund field is a good place to let the requestor know why you rejected their request so they can correct and resubmit it.



Additional Help & Support

iLab Help Site & 24/7 Support

Detailed instructions on navigating and utilizing the system 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. You can also contact one of their support centers via the phone at (800) 690-2957 or (617) 297-2805. These are all 24/7 resources available to assist you with any issues you may encounter in the new system.

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 the ARL Business Office at CoreBusiness@email.arizona.edu or (520) 621-4064 for on-campus support.

iLab Educational Channel on YouTube

You can watch the tutorial videos available by going to the U of A iLab Educational Channel on YouTube. We are constantly working on additional content to add to this site, and welcome suggestions for future additions.

Sincerely,

The University of Arizona – iLab Team