

ARC iLab Guide – CSU PI

If you *currently have at least one active sponsored account* (e.g. 53-account) you should already be set up in iLab as a PI – jump to the next section below.

If you *do not have an active sponsored account*, we will need to manually set you up as a PI in iLab. Please send a request to the VPR iLab contact (arc_ilab@colostate.edu) and *cc your departmental fiscal officer*.

In your request, please specify the following:

- First and Last Name
 - CSU net-ID email (C#####@colostate.edu) – do not use your first.last@colostate.edu
 - Your Department
 - Your Fiscal Officer
 - List of non-sponsored fund numbers you would like associated with this account
-

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1) Finding your Group Page in iLab

1. Navigate to the ARC iLab website.
<https://colostate.ilab.agilent.com/sc/5970/analytical-resources-core-arc/>
- a) Click the *green Login button* and proceed with your CSU eID credentials.
- b) Click on the *main menu symbol* at the top left (three horizontal bars) and click on *My Group*. (Fig. 1)
- c) If you are part of multiple groups/labs, you can then click on your research group on the next page.

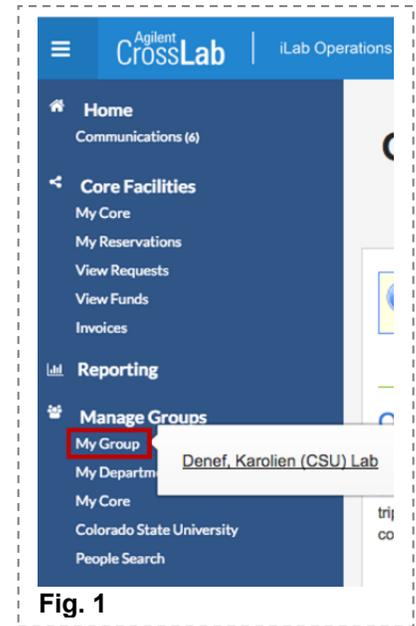


Fig. 1

2) Managing Group Membership & Financial Accounts

As a PI in iLab, you will need to manage your lab members to enable them to utilize core facility instrumentation and/or services. Before one of your lab members can request ARC services, training, or schedule instrument time, they will need a financial account number linked to their iLab account.

- a) Navigate to your group page in iLab following the steps in the Section
- b) Finding your Group Page in iLab.
- c) To control memberships, navigate to the *Membership Requests & Account Names* tab. Here, you can Accept/Reject requests from users. Also, you will get an automatic email notification when a user requests access to your lab with a link to iLab.
 - i) You can add anyone with an existing iLab account to your group. Under the *Members* tab, click the *link existing user* button that exists at the bottom of the list of lab members. Use the search box to find their account. (Fig. 2)
 - ii) Make sure to give any new users access to an account number after inviting them to the lab: 2)d).
 - iii) To remove someone who is no longer part of your lab, under the same *Members* tab, simply click the *delete symbol* at the end of the line of the member. Alternatively, you can click the *edit symbol*, enter an expiration date for the lab member's position in your iLab group, and click *save*. (Fig. 2)

Denef, Karolien (KL) Lab

Membership Requests **Members (2)** Budgets Bulletin board (0) Group Settings

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 \$ 0.0 ⚠️
Cost overage buffer \$ 100 📄

save approval settings

Lab members and settings

Active Members Expired Members

Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date	End Date
Karolien Denef	Lab default (\$0.00)		karoliendenef@gmail.com	9704913832		
Rebecca Miller	Lab default (\$0.00)		rebecca.miller@colostate.edu	515-231-7207		

Link Existing User

Fig. 2

- d) You will need to manage which financial accounts your lab members can charge against. Under the *Membership Requests & Account Names* tab, you should see your lab members listed in rows and your account numbers listed in columns. Your lab members cannot request training, full service, or schedule instrument time before you assign at least one account number to them.
- Check the boxes for the appropriate account number(s) for each of your lab members. (Fig 3)
 - Your sponsored accounts (i.e. 53 accounts) will automatically populate the list. If you are missing an account number or a subaccount, please see 2)e).

Denef, Karolien (CSU) Lab

Membership Requests & Account Names | Members (14) | Bud

Membership Requests

✓ No Access Requests require approval

Manage Account Names

▶ Customize Account Name Grid

▼ Account names

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

Filter Account Name numbers

Filter Members

Name	Default Account Name	account # 1	account # 2	account # 3
Karolien Denef	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Andrea Morello	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Claudia Boot	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Fig. 3

- If you have subaccounts (i.e. XXXXXXX-XXXX) or non-sponsored accounts (13-, 16-) that do not appear in iLab already, you need to request them under the *Membership Requests & Account Names* tab.
 - Note: the (sub)account(s) need to be approved in KFS before they can be added to iLab.
 - Scroll below the list your group members and open the *Request access to additional Account Names* menu. Type in the *account number* and click *Request*. (Fig. 4)
 - The account supervisor in KFS for this account will receive a notification for your request and can Accept/Reject. Please note that this person may be yourself or someone else. Also, this process will only need to be done once for the lifetime of each account.
 - If you are a co-PI on an account and you cannot request the (sub)account, please see Section *Financial Accounts with Co-PIs*.
 - Once the account number has been added to your iLab account, make sure to check the box for each lab member who needs access to this account number.

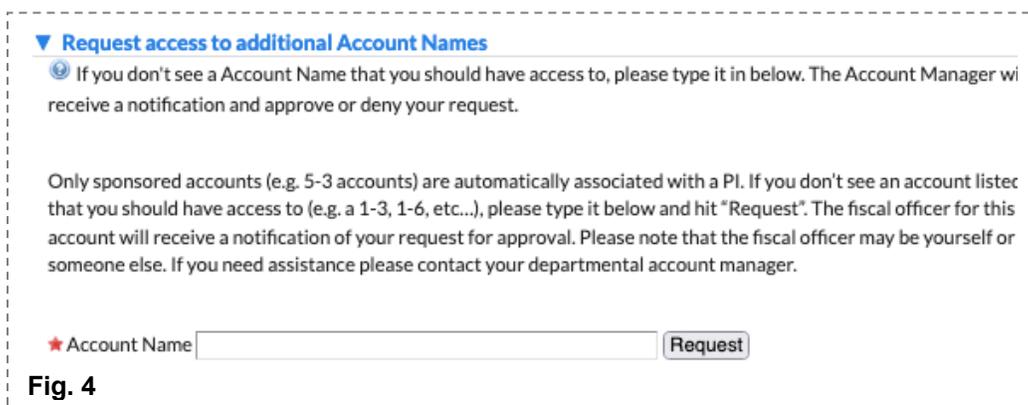


Fig. 4

- f) Please set the default auto-approval threshold under the *Members* tab. (Fig. 5) You, or the Financial Contact if you assign this role to someone else (see Section Assign a Financial Contact for your Group), will need to approve every request that exceeds this threshold (see Section View & Approve your Group's Requests).

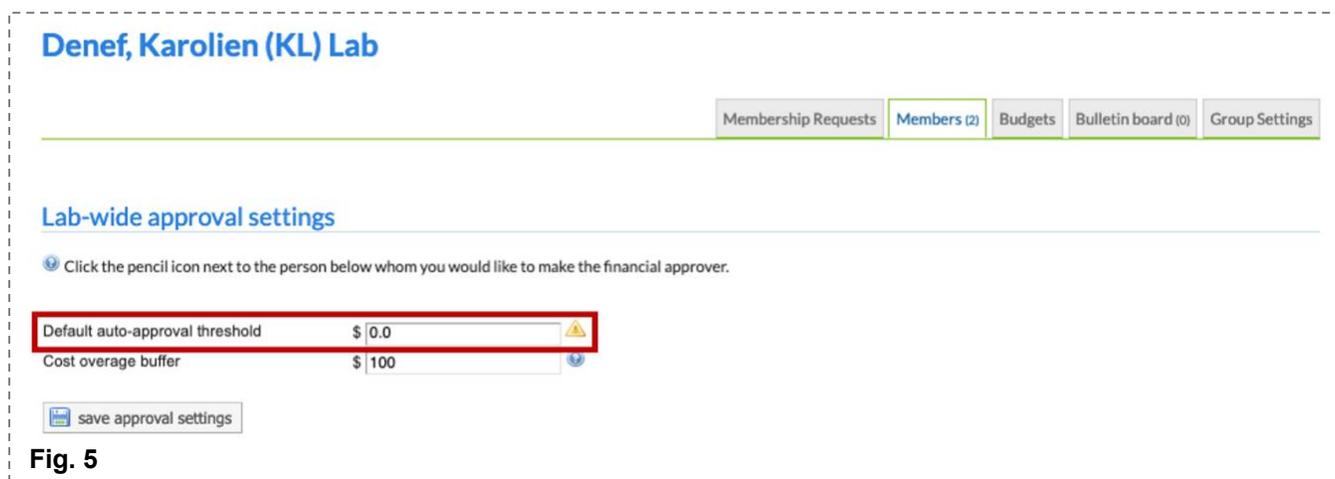


Fig. 5

3) Financial Accounts with Co-PIs

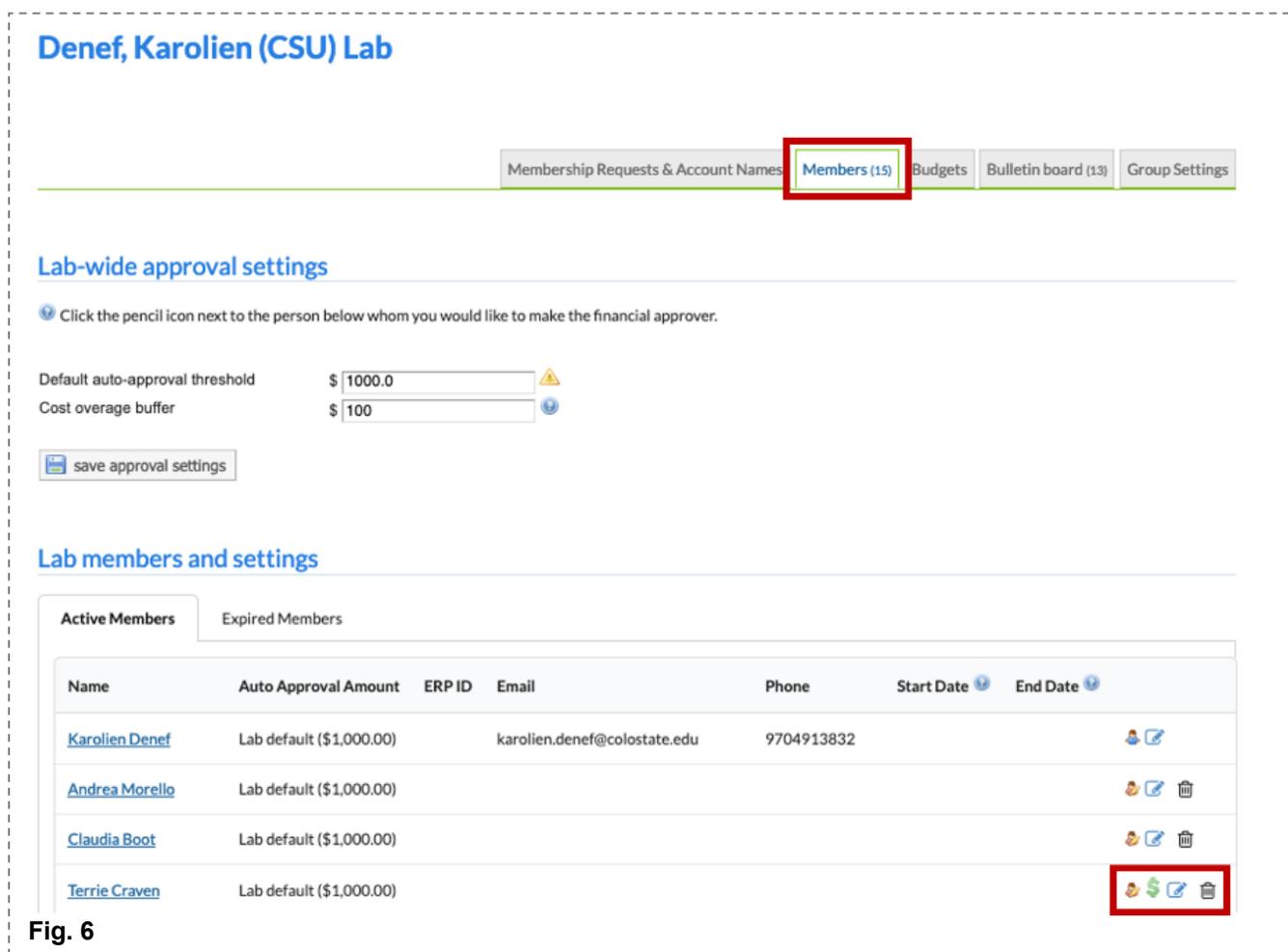
Each sponsored (53-) account can only be linked to one PI in iLab. If you are a co-PI but not the main PI on an account, and your group members need to charge this account, please see the steps below.

- a) Your group members need to request to join the Main PI's group in iLab. Instructions for this are located under the *Account Setup & Joining Group(s)* section of the *ARC iLab Guide – CSU User guide*.
- b) If the (sub)account is not already listed under the Main PI's iLab account, they need to request it to be added. See step 2)e).
- c) The Main PI needs to accept the user(s)' membership request(s) into their group. See step 2)c).
- d) The Main PI needs to assign the (sub)account(s) of interest to these users. See step 2)d).
- e) Once this is complete, the users will be able to select the Main PI's group when the create service/training requests or instrument reservations in iLab. Then, the (sub)account(s) assigned to them by the Main PI will be available for them to choose from for each reservation they create in iLab. See the *Request Service or Training* or *Create an Instrument Reservation* sections of the *ARC iLab Guide – CSU User Guide* for instructions.

4) Assign a Financial Contact for your Group

The monthly ARC invoices can only be sent out to one email address: the Financial Contact for a group in iLab. You as the PI will automatically be the Financial Contact unless you assign this role to a different member of the group. To do so, follow the steps below.

- a) Navigate to your group page in iLab following the steps in the Section
- b) Finding your Group Page in iLab.
- c) Under the Members tab, ensure that the Financial Contact is a member of your group.
 - i) If not, see the Group Membership steps above: 2)c)
- d) Under the **Members** tab, click on the **edit button** for that member. (Fig 6) 
- e) In the window that opens, open the drop-down menu under Permission and choose **Manager**. (Fig 7)
 - i) Then, check the box below this by **Core Financial Contact?**
 - ii) Click **save**.
 - iii) Now, this person should have the green dollar symbol on their line under the Members tab.
- f) Under the **Group Settings** tab and below the Communication Settings heading, choose your Financial Contact as the Lab Primary Contact. **Click to edit** and select your Financial Contact. (Fig 8)



Denef, Karolien (CSU) Lab

Membership Requests & Account Names **Members (15)** Budgets Bulletin board (13) Group Settings

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 \$ 1000.0 
Cost overage buffer \$ 100 

 save approval settings

Lab members and settings

Active Members Expired Members

Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date 	End Date 	
Karolien Denef	Lab default (\$1,000.00)		karolien.denef@colostate.edu	9704913832			 
Andrea Morello	Lab default (\$1,000.00)						  
Claudia Boot	Lab default (\$1,000.00)						  
Terrie Craven	Lab default (\$1,000.00)						   

Fig. 6

Fig. 7

Fig. 8

5) View & Approve your Group's Requests

- a) Click on the main menu symbol at the top left (three horizontal bars) and click on *View Requests*.
 - i) **Awaiting Approval:** displays any requests made by a researcher from your lab to a core that has exceeded the pre-approved cost that the lab has set. This request now requires approval from a financial manager to proceed with the service request. Simply click *Agree* or *Disagree*.
 - ii) **Require Payment Info:** all requests are required to have a financial account before submission, so you should not need to use this.
 - iii) **Processing and Recently Completed & All Requests:** self-explanatory.

6) Request Service or Training

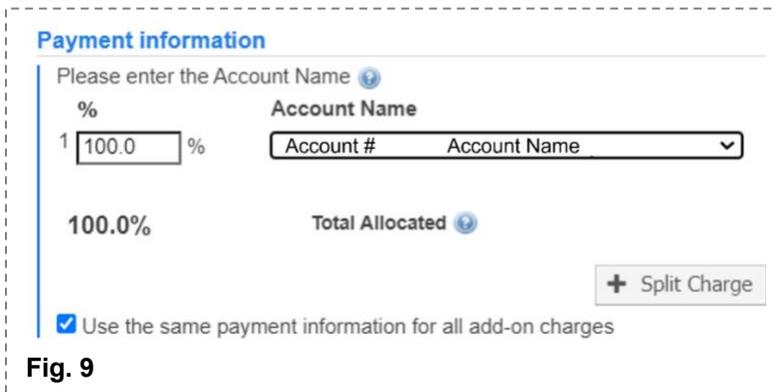
As a PI you can request services, training, and schedule equipment yourself as well! If you require ARC staff to carry out data collection and analysis, submit a service request. If you wish to be trained on an instrument, submit a training request.

- a) Navigate to the ARC iLab website: <https://colostate.ilab.agilent.com/sc/5970/analytical-resources-core-arc/>
- b) Log in to iLab with your CSU eID credentials.
- c) Select the *Request Services* tab and click on the *Initiate Request* button next to the service of interest.
 - i) Request Options:
 - (1) **Training Request:** if you would like to independently use an instrument, request training.
 - (2) **Full Service Requests:** if you wish ARC employees to perform analysis, please find the request that fits your needs based on the analysis needed.
 - ii) You will be asked to complete one or more form(s) before *submitting* the request to the core.
 - iii) Your request will be pending review by the core. The core will review your request and reach out to you about scheduling instrument time and asking for more information, if needed.
- d) [Please request to join the ARC Users Team](#) for information training, safety, analysis & more.

7) Create an Instrument Reservation

If you have been trained on an instrument, you can create a reservation to use the instrument.

- a) Navigate to the ARC iLab website.
<https://colostate.ilab.agilent.com/sc/5970/analytical-resources-core-arc/>
- b) Log in to iLab with your CSU eID credentials.
- c) Select the *Schedule Equipment* tab and click on the name of the instrument or the *View Schedule* button next to the instrument of interest.
- d) On the calendar, click and drag to select a time frame.
- e) The next page will allow you to verify your reservation details and provide payment information (Fig 9) before *saving* the reservation.



The screenshot shows a 'Payment information' form. At the top, it says 'Please enter the Account Name'. Below this, there are two input fields: a percentage field with '100.0' and a dropdown menu for 'Account Name' which is currently set to 'Account #'. Below these fields, there is a 'Total Allocated' field with a dropdown arrow and a '+ Split Charge' button. At the bottom, there is a checkbox labeled 'Use the same payment information for all add-on charges' which is checked.

Fig. 9

8) Use the iLab Kiosk to Record Instrument Time

1. Navigate to the iLab Kiosk website. Typically, when you log in to an instrument computer, a web browser should automatically open to this site and you'll log in with your CSU eID credentials. Otherwise, you can use the link below or click *Go to Kiosk* under the *Schedule Equipment* tab of the ARC iLab webpage.
 - a. ARC Kiosk: https://colostate.ilab.agilent.com/service_centers/5970/equipment_kiosk/dashboard
2. If you created an instrument reservation, you will see a list of your reservations under My Kiosk Sessions. For creating a walk-up session in the iLab Kiosk, see instructions under 2b.
 - a. Previously existing instrument reservations:
 - i. Click the green *Start* button at the right for the instrument session you are about to begin.
 - b. Walk-Up Instrument Sessions:
 - i. Select the instrument on the left hand menu. You may need to open a drop down menu.
 - ii. Choose your lab group if you are part of multiple groups. If you are in one group, it will skip this step.
 - iii. A calendar for the availability will appear. Click the green *Create Session* button and select the desired reservation time. Click *Create Session* again.
 - iv. A new page with your reservation details will load. Click the green *Start* button to start the instrument session.
3. You can alter various details about your instrument reservation on this page.
 - a. Payment Information: You can select the appropriate account that should be billed for this instrument reservation.
 - b. Add-on Charges: You may need to select an add-on charge for your reservation. If so, click *Add charge*. Select the appropriate charge from the drop down menu. Enter the quantity and click *save*. (Fig. 10)

- c. Use Type: You may need to alter the Use Type of your reservation. If so, you can select the appropriate usage type from the drop down menu.
4. If you need to extend your instrument reservation, click the **Extend** button. Select the amount of extra time you need, and click the blue **Extend** button to save. Note: if another instrument reservation exists after yours, you may not be able to extend your reservation time.
5. When you are finished on the instrument, click the blue **Finish** button. Confirm by clicking the green **Finish Session** button.
6. Log off the iLab Kiosk page.

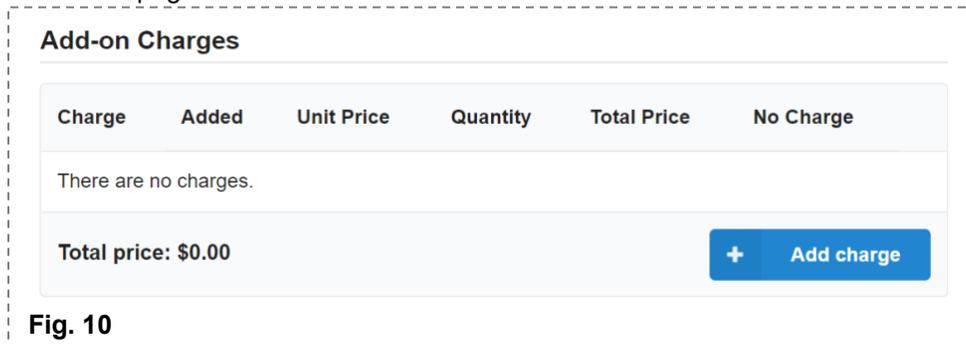


Fig. 10

9) View your Requests

- a) You can view your submitted service or training requests under the **View My Requests** tab. (Fig. 11)
- b) To view the details of your request, click the little **blue triangle** at the top left of the request.
- c) You can view your non-active requests (i.e. drafts, cancelled, completed) by clicking on **active requests** at the top right and choosing a different option. (Fig. 12)
- d) To cancel a request, click on the **pencil and arrow symbol** on the right side of the request. Then, click **cancel** in the window that opens up and confirm your cancellation. (Fig. 13)

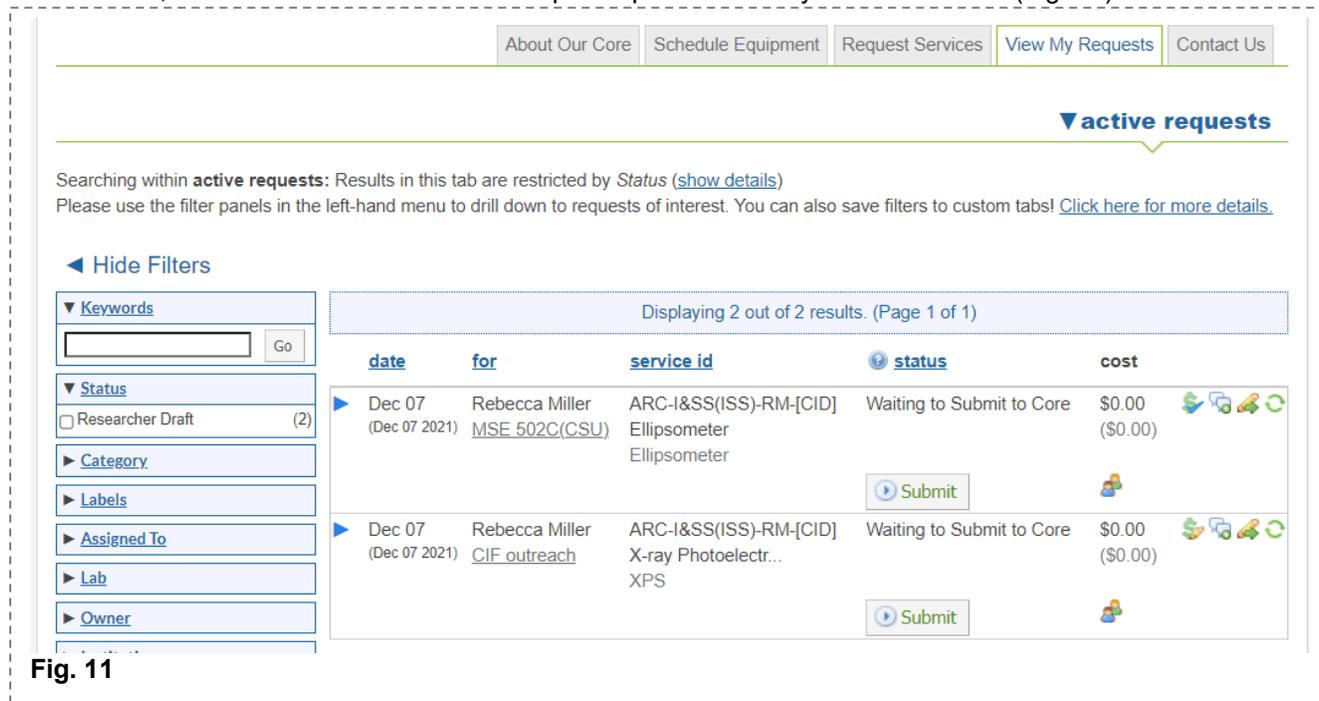


Fig. 11

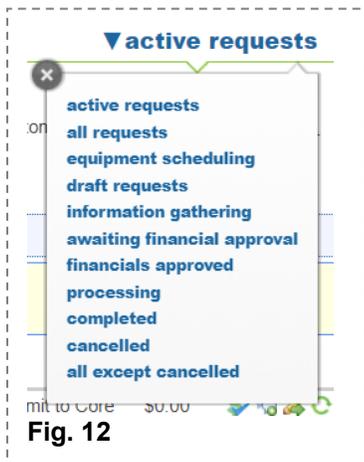


Fig. 12



Fig. 13

10) View Invoices & Edit Account Numbers

Invoices are sent out monthly via email to the Financial Contact of each group in iLab. Typically this is the PI of the group, but this may be assigned to a different member of the group by the PI. See Section [Assign a Financial Contact for your Group](#).

During the five business days following receipt of the invoice email, you can review the invoices and edit the financial accounts to be charged. After this period, the charges are sent to KFS.

- a) Under the *main menu* (three horizontal bars at the top left), click *Invoices*.
- b) If needed, filter the invoices by opening any of the Filter drop-down menus, checking the appropriate boxes, and then clicking Apply Filters at the bottom of the filter list.
- c) To view an invoice, click on the *magnifying glass symbol* at the right side of invoice line. It will open in a new tab with the invoice ready to be reviewed. (Fig. 14) 
- d) To edit the account numbers assigned to individual charges, click the *dollar sign symbol* at the right side of a request (under the total cost column). A payment window will open up for the request. Check the boxes for each line item you wish to edit, choose the appropriate account number, and click *save*.
- e) To split charges between multiple account numbers, open the payment window for a request as outlined in the previous steps and check the box for all the line items of interest.
 - i) Edit the percentage for the first account number selected.
 - ii) Click *split charge*, select a 2nd account number, and edit the percentage.
 - iii) Repeat as needed to include as many account numbers as necessary, making sure the percentages total to 100%.
 - iv) Click *save*.

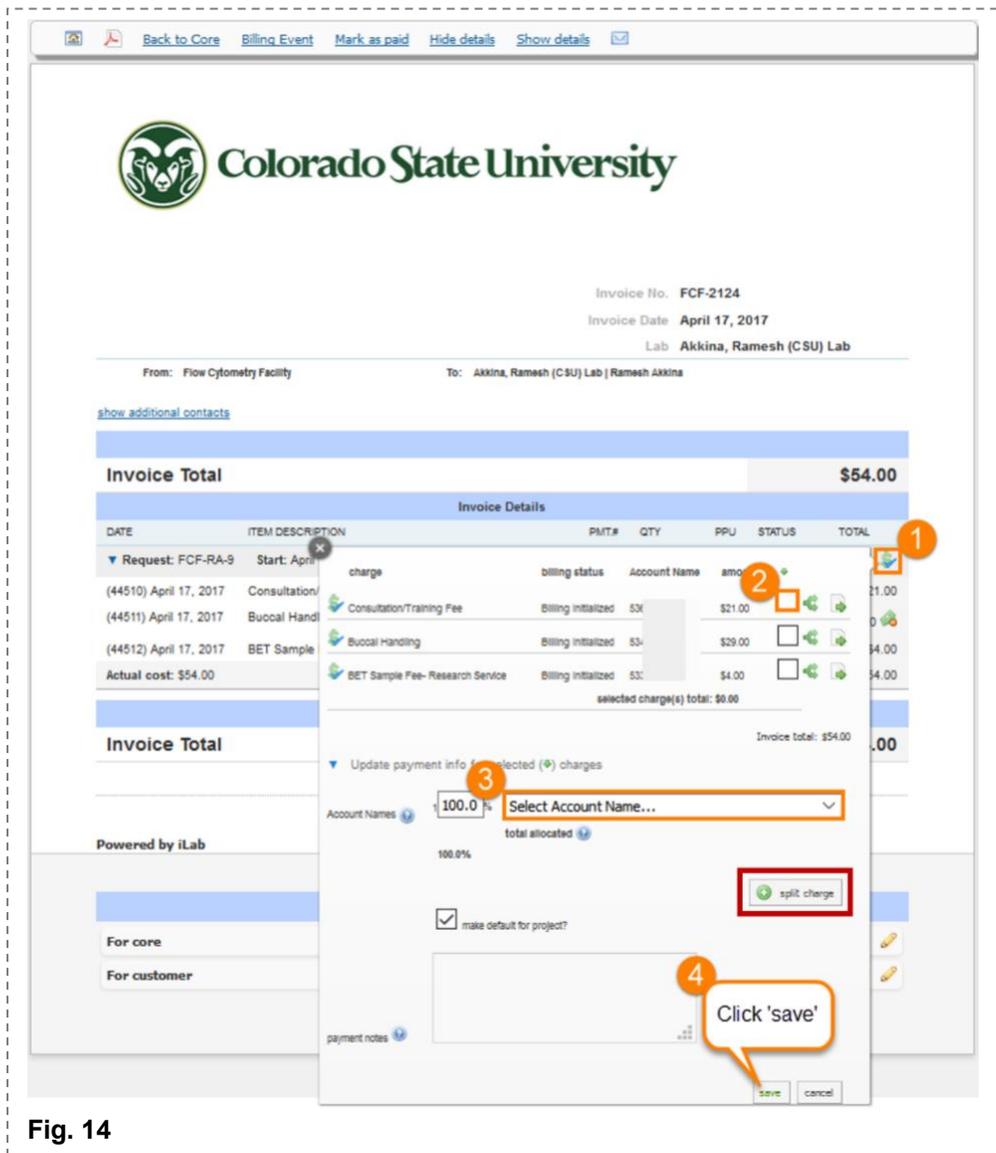


Fig. 14

11) Questions?

Any questions can be directed to arc_ilab@colostate.edu.

Additionally, more detailed instructions are available on the [iLab Help Site](#). For any questions that are not addressed on the help site, you can also click on the "HELP" link in the upper right hand corner to submit a ticket or send an e-mail directly to support@ilabsolutions.com.