Idea Elan

2018

Caltech Lab Admin Quick Guide for Infinity Software

Comprehensive Online Solution for Lab and Core Facility Management

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Herndon, VA 20171
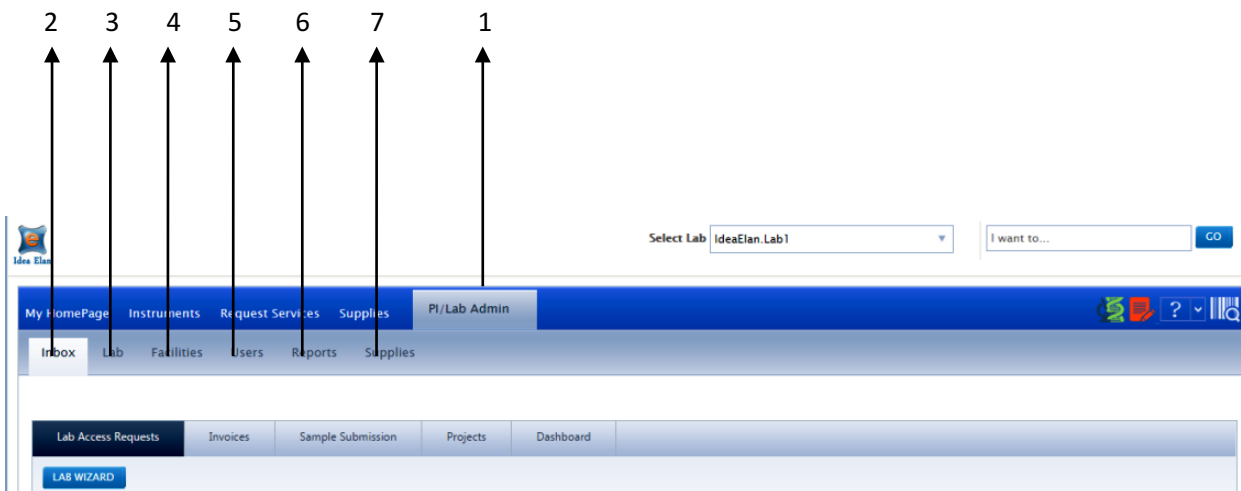Phone: 1-800-506-5905
Email: support@ideaelan.com

Contents

Quick Startup Guide for PIs/ Lab Admin

The Lab Admin/PI:

Once logged in as a lab admin, a toolbar with tabs will appear that are specific to your role.

Lab Admin Functions:

1. **Lab Admin**: To access all the lab admin features
2. **Inbox**: To view, accept and reject requests.
3. **Lab**: To add lab information, billing details such as account codes or purpose codes, and to access lab settings.
4. **Facilities**: To view and request access to various facilities listed.
5. **Users**: To add a user or to import/export users in bulk.
6. **Reports**: To generate and view usage/ expense reports for users and labs.
7. **Supplies**: To create supply orders.

Inbox Functions:
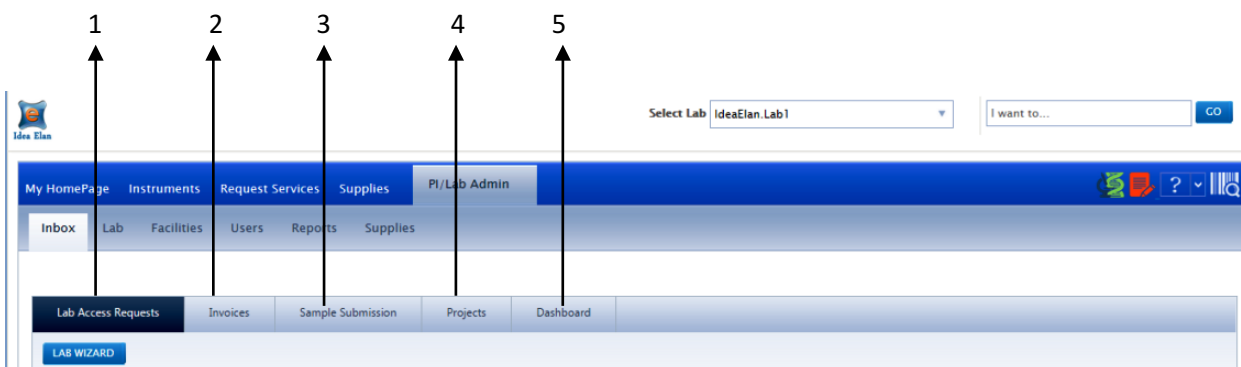
1. **Lab Access Requests**: To view, accept and reject user requests to the lab.
2. **Invoices**: To view, edit and accept invoices.
3. **Sample Submission:** To view sample submissions for the lab.
4. **Projects**: To view projects for the lab.
5. **Dashboard**: Displays the number of samples submitted, and the number of instrument reservations made.

Lab Details:
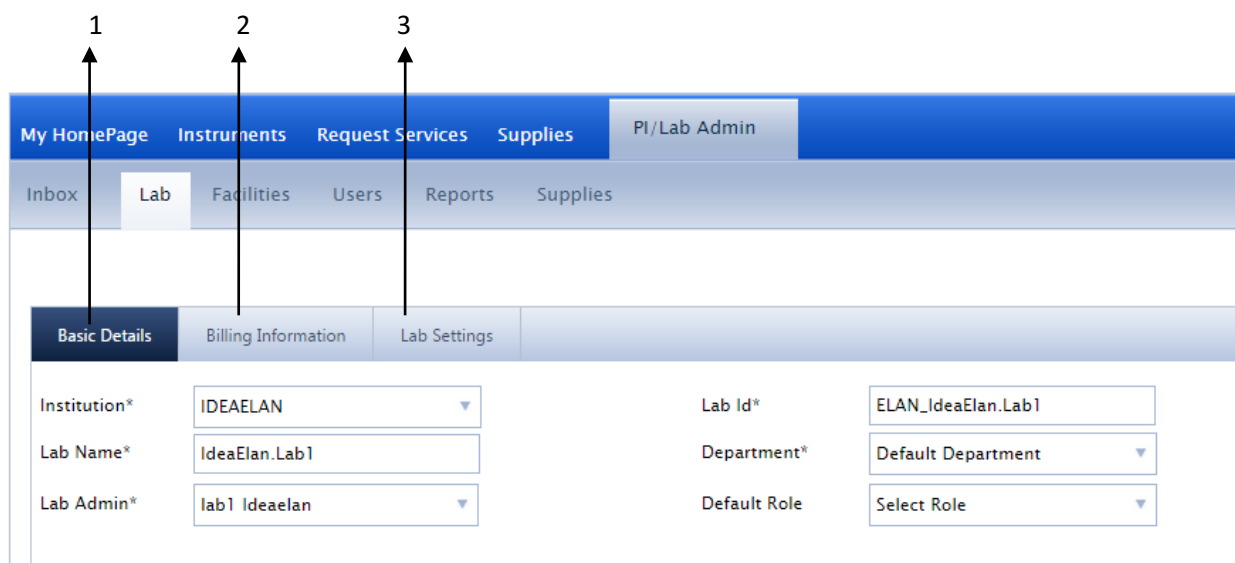
1. **Basic Details**: Select to fill out lab information.
2. **Billing Information:** Select lab billing type and view or edit account codes or purpose codes.
3. **Lab settings**: Click to select an alternative lab admin and set invoice approvals.

Billing Information:

Selecting the billing information tab will allow the lab admin or PI to view, add, or edit account code or PTA information.
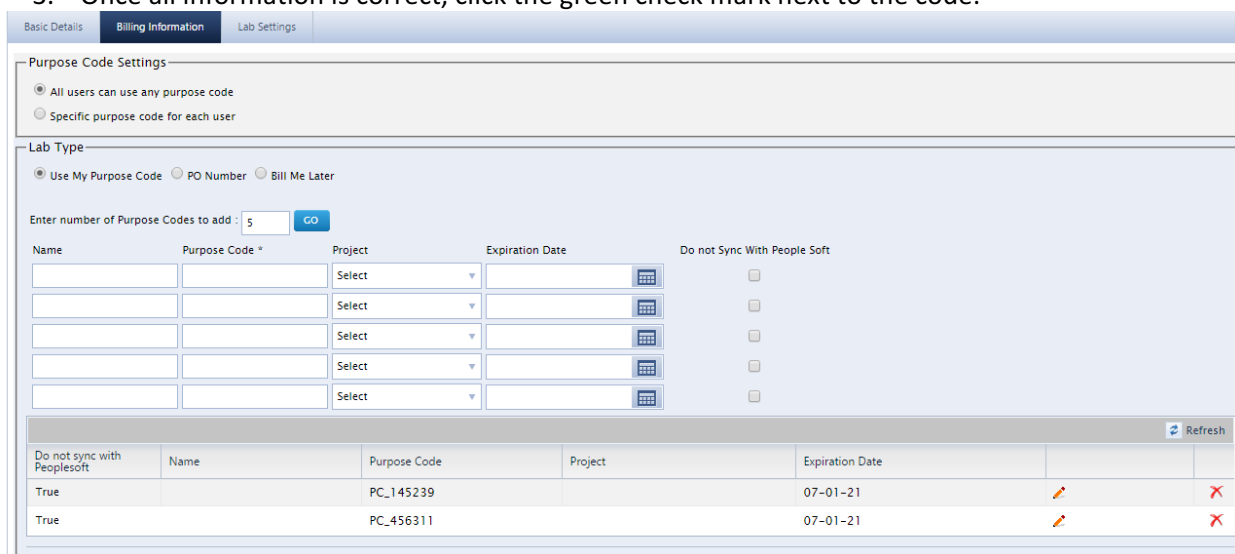
Lab admin can select between the lab types such as "Use my account code," "PO Number," or "Bill Me Later."

To add an Account Code:
1. Enter a name, account code or PTA number, applicable project (optional), and an expiration date.
2. Click update at the bottom of the page.

To edit Account Codes:
1. Find the Account code at the bottom of the page.
2. Click on the pencil next to the purpose code to edit.
3. Once all information is correct, click the green check mark next to the code.

Basic Details	Billing Information	Lab Settings			

Purpose Code Settings

○ All users can use any purpose code
○ Specific purpose code for each user

Lab Type

● Use My Purpose Code ○ PO Number ○ Bill Me Later

Enter number of Purpose Codes to add : 5 [GO]

Name	Purpose Code *	Project	Expiration Date	Do not Sync With People Soft
		Select ▾	🗓	☐
		Select ▾	🗓	☐
		Select ▾	🗓	☐
		Select ▾	🗓	☐
		Select ▾	🗓	☐

⟳ Refresh

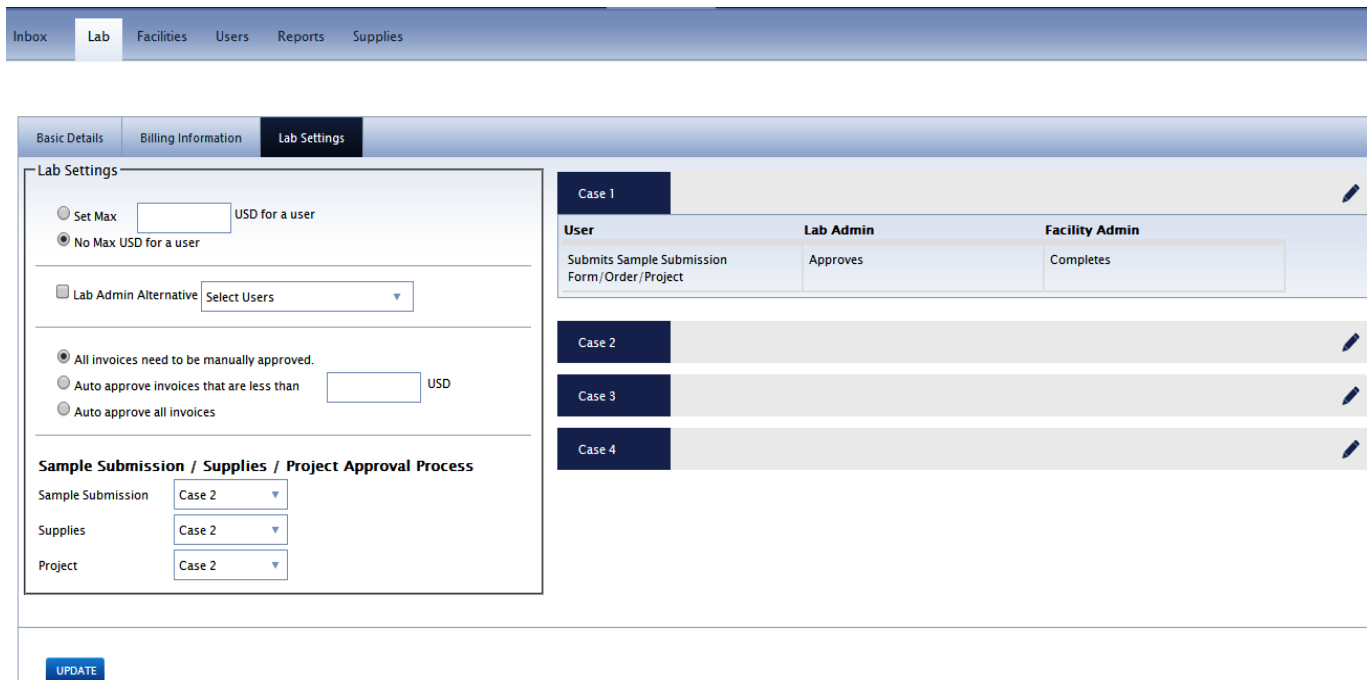| Do not sync with Peoplesoft	Name	Purpose Code	Project	Expiration Date		
True		PC_145239		07-01-21	✎	✗
True		PC_456311		07-01-21	✎	✗

Lab Settings

Other lab details can be set under the Lab Settings section, such as:
- maximum amount a user can use from a grant
- Invoice approval settings modified to allow an invoice to be approved manually or automatically
- lab alternative
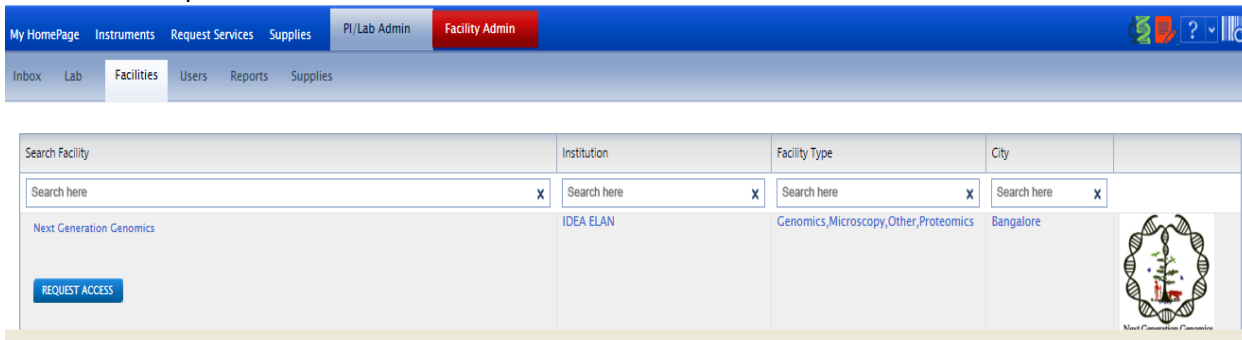
Sample Submission/Supplies/ Project approvals are set here. There are 4 cases according to the process followed:

- **Case 1**: User submits a sample, the lab admin approves, and the facility admin completes it.
- **Case 2**: User submits a form that is auto approved and the facility admin completes it.
- **Case 3**: User submits a sample. The facility admin creates a quote, and the lab admin will reject or accept depending on the amount of the quote. Once approved, the facility admin. completes it
- **Case 4**: The user submits a sample, and based on whether the user is an External User or an Internal User, any of the above cases and be set and applied.

Facilities:

To view and request access to various facilities listed.

Users:

All users affiliated with the lab are listed under the users tab. New users can be added one at a time by clicking on the "Add New User" tab on the top right side, or in bulk by clicking on "Import from excel", to import a detailed excel sheet.

PIs can also remove user access to the lab by clicking the green check mark under the "Status" column.

The list of users can also be exported as word, excel or PDF document.

Reports

The Lab admin can generate various lab based / project based reports, to study the expenses of the lab, instrument usage by users affiliated to it, etc.
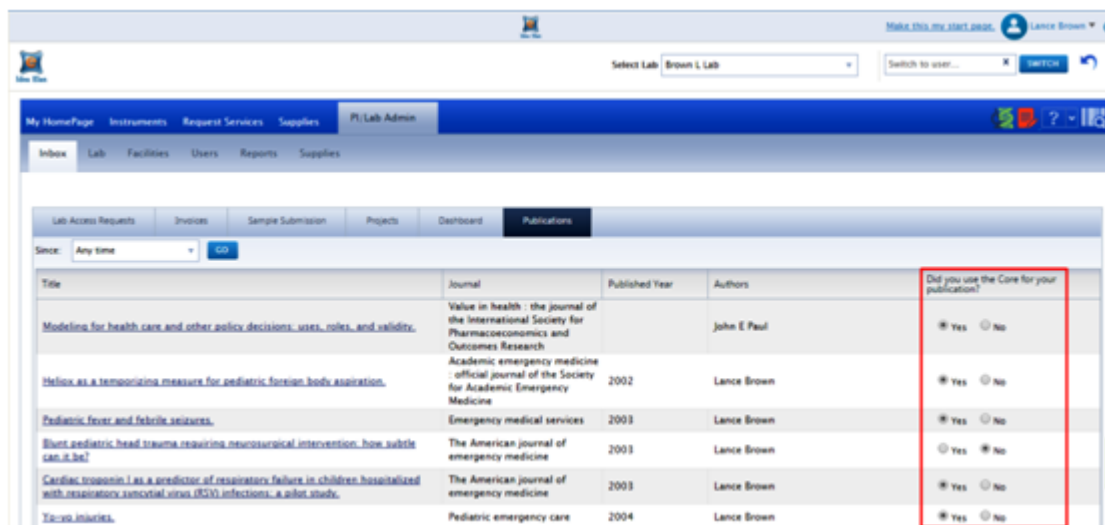
Select the report type from the dropdown menu, enter the required data range and click on run report. Options to save the report are available. You can also export the report as a Word or PDF document.

Publications

PIs/ Lab Admin should confirm that users have used a particular facility before the core can present their publications. Under Inbox> Publications, PIs can view a list of user publications that facility admin have
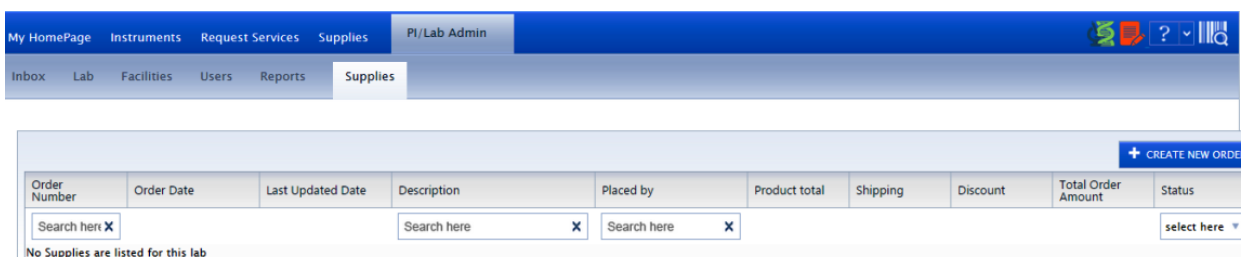
requested to claim under their core. The PI has the option to select "Yes" or "No."

Supplies

The Lab admin can view all orders made by the users of that lab. Lab admin can also order supplies. To do so, click on the "Supplies" tab on the lab admin toolbar. Then, click "Create an Order", to begin the order.

Select the facility from the dropdown menu. Default labs and account codes or purpose codes will appear if applicable. If they are not, select from the lab and account code or purpose code drop down.
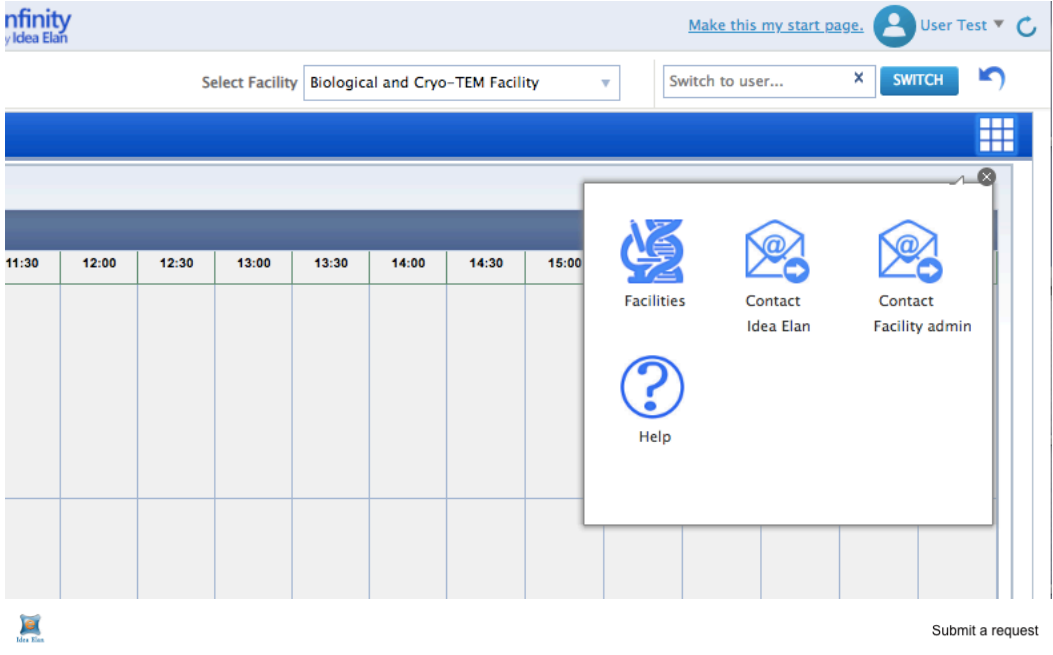
After lab, specific information has been inputted into the fields, select the supplies necessary. Specify the quantity, and click on "Create an order" at the bottom of the page.

Access Help Options

To request access to Help Options, click on the 9 square grid box on the right side of the page. Here you have the option to contact Idea Elan or the Facility admin.
In addition, you can access the Idea Elan Help page to read articles or search for answer to specific questions.