



Idea Elan

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2018

**Caltech Lab Admin Quick
Guide for Infinity Software**

Comprehensive Online Solution for
Lab and Core Facility Management

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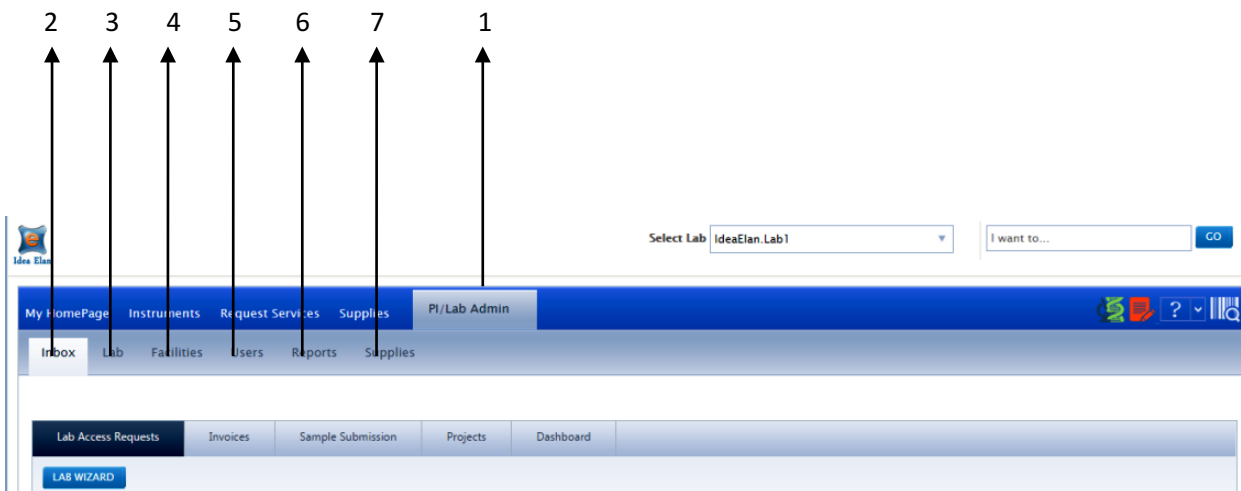
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Quick Startup Guide for PIs/ Lab Admin

The Lab Admin/PI:

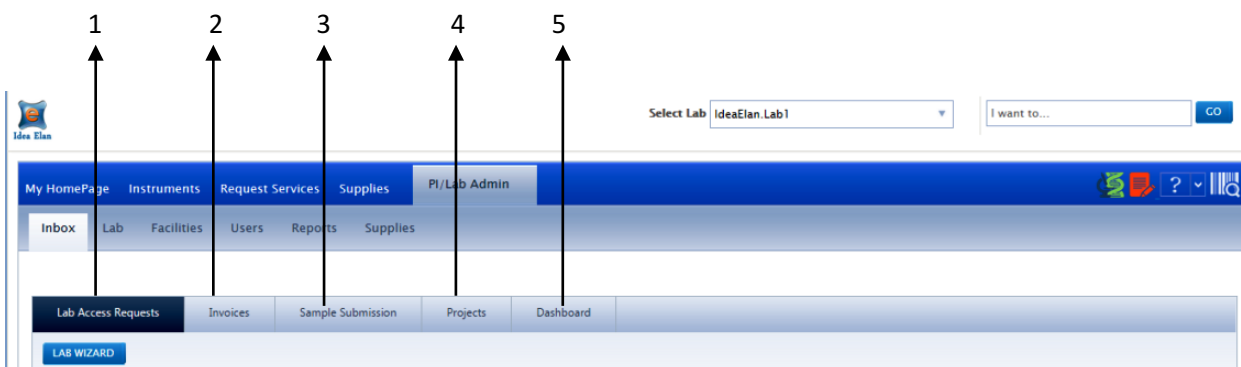
Once logged in as a lab admin, a toolbar with tabs will appear that are specific to your role.

Lab Admin Functions:



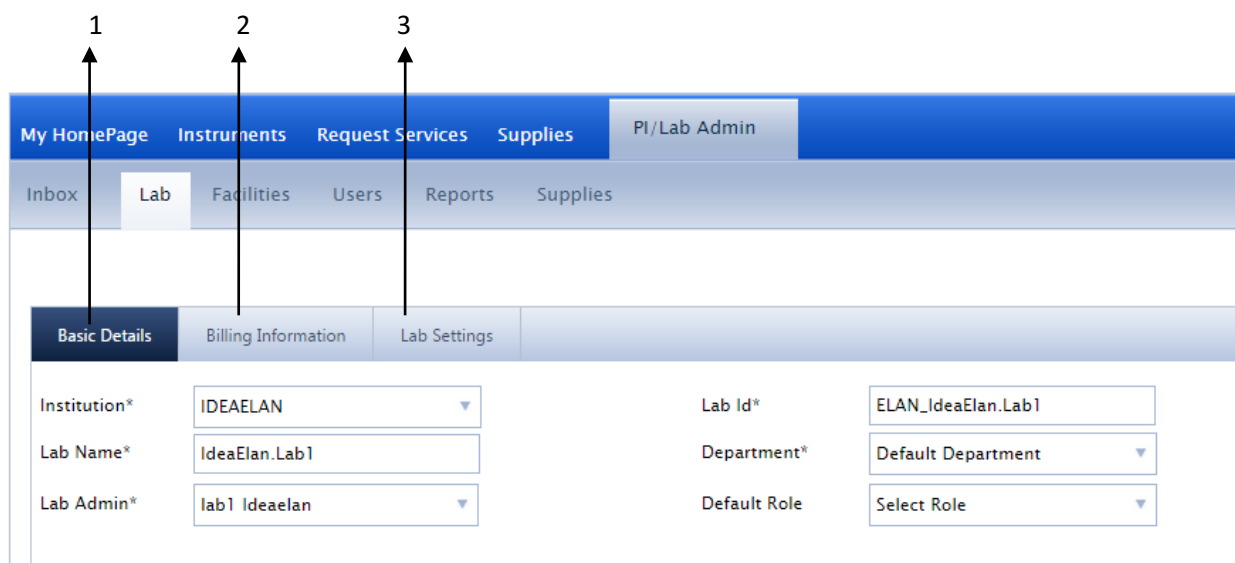
1. **Lab Admin:** To access all the lab admin features
2. **Inbox:** To view, accept and reject requests.
3. **Lab:** To add lab information, billing details such as account codes or purpose codes, and to access lab settings.
4. **Facilities:** To view and request access to various facilities listed.
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.

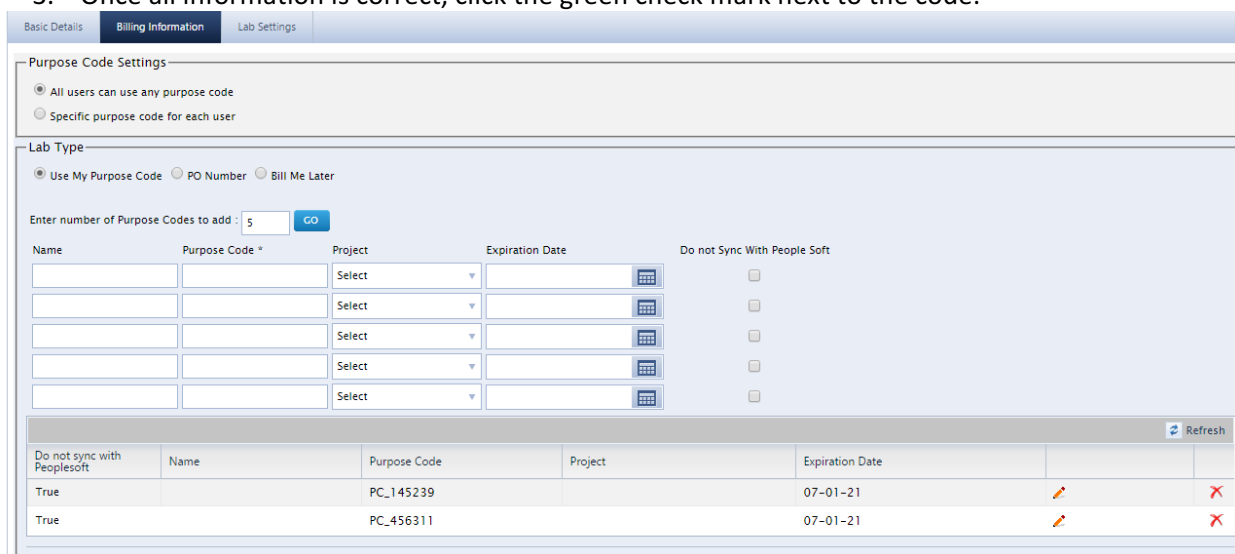
Lab admin can select between the lab types such as “Use my account code,” “PO Number,” or “Bill Me Later.”





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.



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

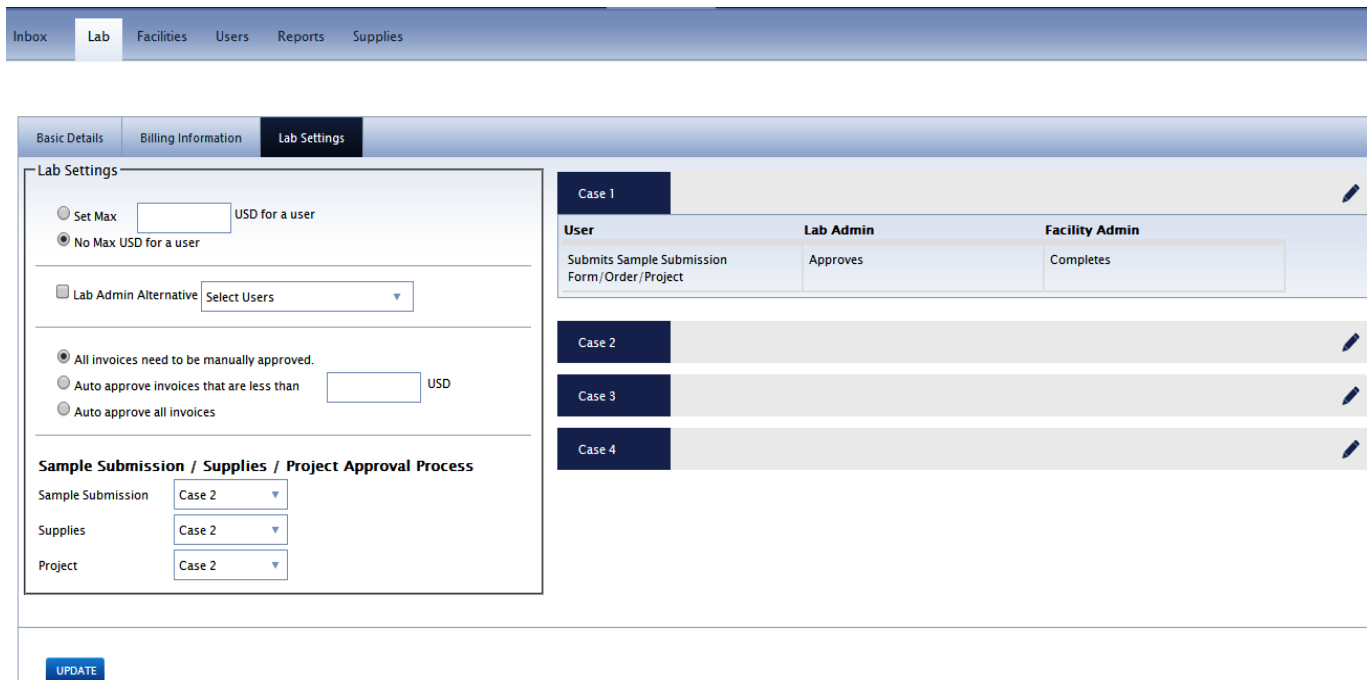
Lab Settings

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 can be set and applied.



The screenshot shows the 'Lab Settings' configuration page. It includes tabs for 'Basic Details', 'Billing Information', and 'Lab Settings'. The 'Lab Settings' section contains several options:

- Set Max [] USD for a user
- No Max USD for a user
- Lab Admin Alternative [Select Users]
- All invoices need to be manually approved.
- Auto approve invoices that are less than [] USD
- Auto approve all invoices

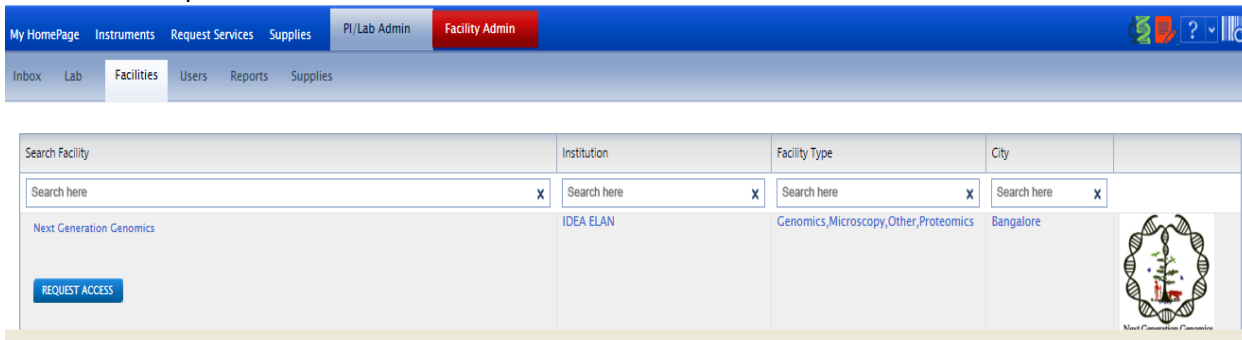
The 'Sample Submission / Supplies / Project Approval Process' section has dropdown menus for 'Sample Submission', 'Supplies', and 'Project', all currently set to 'Case 2'. A table on the right lists four cases with their respective roles:

Case	User	Lab Admin	Facility Admin
Case 1	Submits Sample Submission Form / Order / Project	Approves	Completes
Case 2			
Case 3			
Case 4			

An 'UPDATE' button is located at the bottom left of the settings area.

Facilities:

To view and request access to various facilities listed.



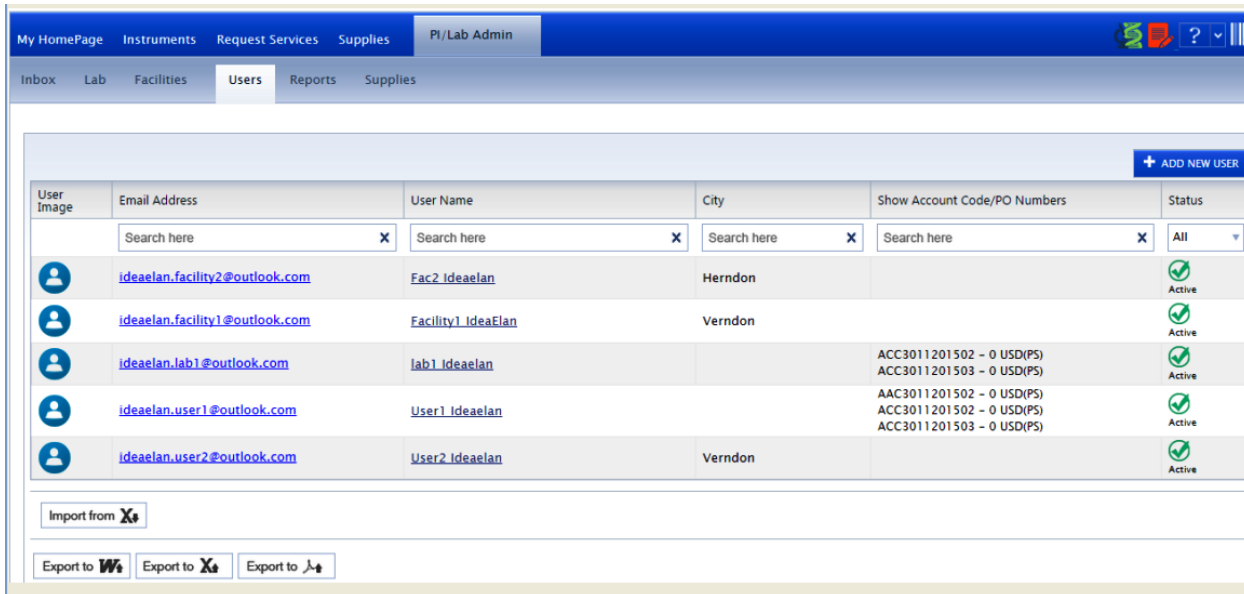
The screenshot shows the 'Facilities' search and request access page. It includes a navigation bar with 'My HomePage', 'Instruments', 'Request Services', 'Supplies', 'PI/Lab Admin', and 'Facility Admin'. The 'Facilities' tab is active. Below the navigation bar, there is a search table with columns for 'Search Facility', 'Institution', 'Facility Type', and 'City'. A 'REQUEST ACCESS' button is visible at the bottom left of the search results area.

Search Facility	Institution	Facility Type	City
Search here	Search here	Search here	Search here
Next Generation Genomics	IDEA ELAN	Genomics, Microscopy, Other, Proteomics	Bangalore

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.



User Image	Email Address	User Name	City	Show Account Code/PO Numbers	Status
	ideaelan.facility2@outlook.com	Fac2 Ideaelan	Herndon		Active
	ideaelan.facility1@outlook.com	Facility1 IdeaElan	Verndon		Active
	ideaelan.lab1@outlook.com	lab1 Ideaelan		ACC3011201502 - 0 USD(P5) ACC3011201503 - 0 USD(P5)	Active
	ideaelan.user1@outlook.com	User1 Ideaelan		AAC3011201502 - 0 USD(P5) ACC3011201502 - 0 USD(P5) ACC3011201503 - 0 USD(P5)	Active
	ideaelan.user2@outlook.com	User2 Ideaelan	Verndon		Active

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.

- ▾ **Lab Based Reports**
 - [Expenses over period](#)
 - [Expenses month over month](#)
 - [Usage Report](#)
 - [Supplies](#)
- ▾ **Project Based Reports**
 - [Expenses over period](#)
 - [Expenses month over month](#)
 - [Usage Report](#)
 - [Supplies](#)

Lab Based Reports

Select saved report selection(s)

Report Name ?

Report Type Account Code

Date Range

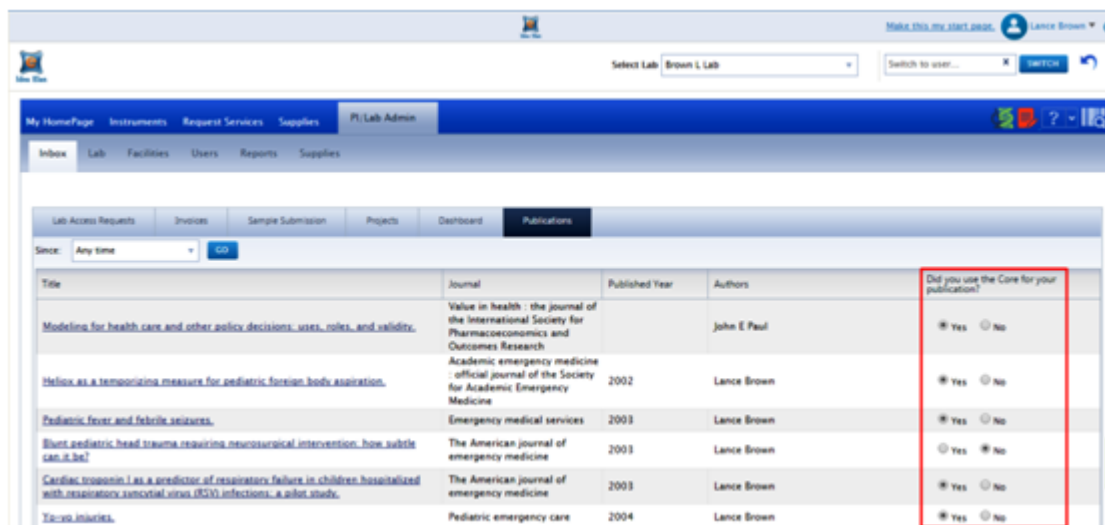
"/>
"/>
"/>

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

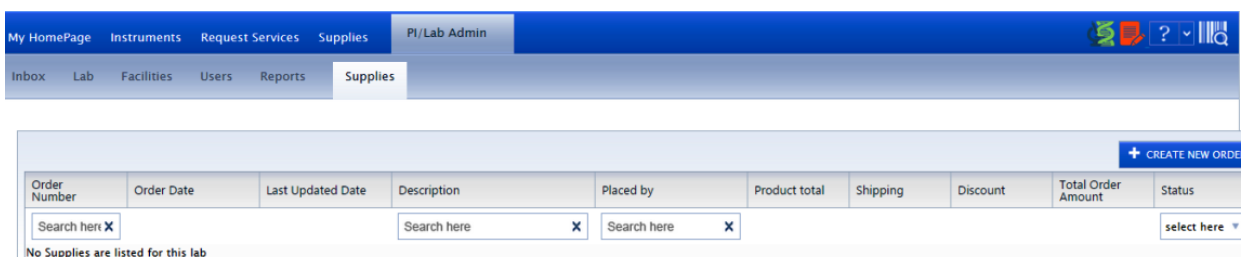
requested to claim under their core. The PI has the option to select “Yes” or “No.”



Title	Journal	Published Year	Authors	Did you use the Core for your publication?
Modeling for health care and other policy decisions: uses, roles, and validity.	Value in health : the journal of the International Society for Pharmacoeconomics and Outcomes Research		John E Paul	<input checked="" type="radio"/> Yes <input type="radio"/> No
Heliox as a temporizing measure for pediatric foreign body aspiration.	Academic emergency medicine : official journal of the Society for Academic Emergency Medicine	2002	Lance Brown	<input checked="" type="radio"/> Yes <input type="radio"/> No
Pediatric fever and febrile seizures.	Emergency medical services	2003	Lance Brown	<input checked="" type="radio"/> Yes <input type="radio"/> No
Short pediatric head trauma requiring neurosurgical intervention: how subtle can it be?	The American journal of emergency medicine	2003	Lance Brown	<input type="radio"/> Yes <input checked="" type="radio"/> No
Central tracheitis as a predictor of respiratory failure in children hospitalized with respiratory syncytial virus (RSV) infections: a pilot study.	The American journal of emergency medicine	2003	Lance Brown	<input checked="" type="radio"/> Yes <input type="radio"/> No
Taxol in adults.	Pediatric emergency care	2004	Lance Brown	<input checked="" type="radio"/> Yes <input type="radio"/> 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.



Order Number	Order Date	Last Updated Date	Description	Placed by	Product total	Shipping	Discount	Total Order Amount	Status
No Supplies are listed for this lab									

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.

My HomePage Instruments Request Services Supplies **PI/Lab Admin**

Inbox Lab Facilities Users Reports **Supplies**

Facility*

Name/Address Ship To

Phone:

Projects: [Set as default](#)

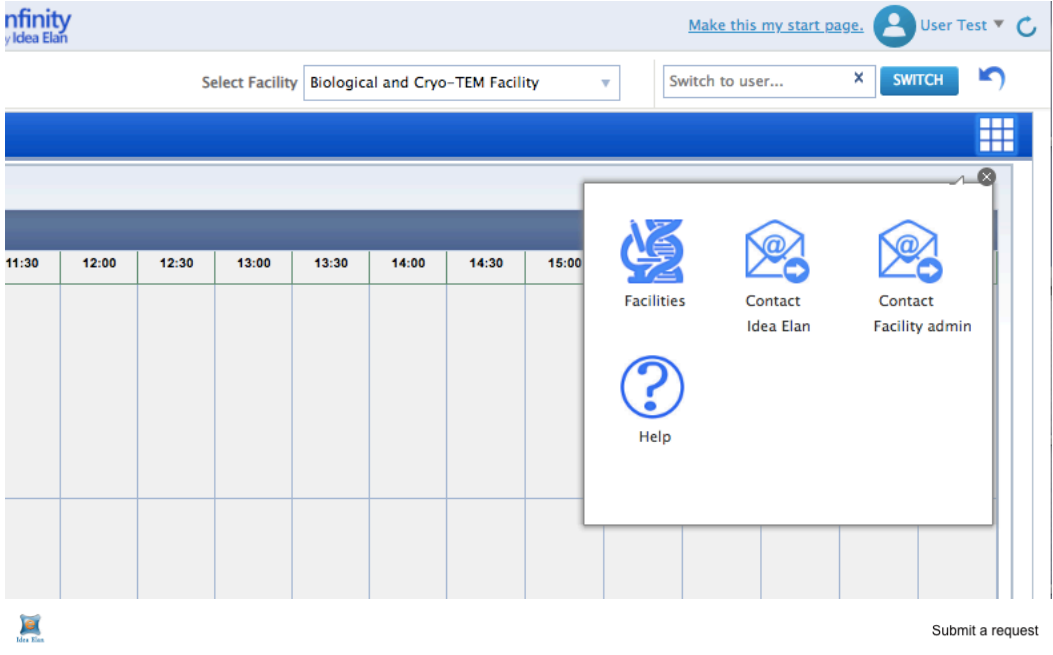
Lab*: [Set as default](#)

Account Code1*: % [Set as default](#)

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.



The screenshot shows the Idea Elan software interface. At the top, there is a navigation bar with the 'nfinity by Idea Elan' logo, a link to 'Make this my start page.', and a user profile for 'User Test'. Below this is a 'Select Facility' dropdown menu set to 'Biological and Cryo-TEM Facility' and a 'Switch to user...' button with a 'SWITCH' button. The main area features a calendar grid with time slots from 11:30 to 15:00. A 3x3 grid icon in the top right corner of the calendar area is highlighted, and a help menu is overlaid on it. The help menu contains four options: 'Facilities' (with a microscope icon), 'Contact Idea Elan' (with an envelope icon), 'Contact Facility admin' (with an envelope icon), and 'Help' (with a question mark icon). At the bottom of the calendar area, there is a 'Submit a request' button and a user profile for 'Test User'.

Idea Elan Support > Users > Instruments

Search

Instruments

Follow

- [How to Request Instrument Access](#)
- [Does the software provide a list of all of my reservations?](#)
- [Can a user book on behalf of another user?](#)
- [Will users see lab instruments along with other facility instruments?](#)
- [How to Report a Technical Issue on an Instrument](#)
- [Can a user email another user who has made a reservation from the software?](#)
- [How to Cancel a Reservation](#)
- [As an user why am I seeing only training as an option under session type?](#)