iLab Account Basics and Setting Up a New User Account
VU and VUMC Users ONLY

Introduction: <u>iLab User Roles</u>

Our login page for iLab is now <u>https://vanderbilt.corefacilities.org.</u>

iLab functions differently from the C.O.R.E.S. System, as your user account is a global account within the iLab system. What does this mean for you? This means:

- You only need to set up a user account once, and with this account, you can utilize cores at VU, at VUMC, as well as at any other institution around the world that is utilizing iLab. (Please see Figure 1 in <u>Section 3.1</u>). If you have already set up an iLab account, you do not need to set up another one.

- Once VU and VUMC have fully completed their transition onto iLab, you will only need to log into one system. Until then, please pay attention to the implementation calendars for both institutions' cores, as we will still be utilizing the CORES system until the transition is fully completed.

<u>Roles:</u>

Please go to <u>Section 1</u> for special instructions on signing up for the desired user account needed. If you already have a user account, but need to be added to an additional role, please ask your PI, Lab Manager, or Department Administrator to link you to the correct lab. If you are a VUMC user, please submit the correct <u>form</u> to our office.

- ➢ **Principal Investigators:** This role is for users who are conducting research using their own source of funding. This can either be a grant, a scholarship or a voucher.

- ➢ **Lab Managers:** This role is for users who manage a lab for a PI. The Lab Manager will have the same access to the lab as the PI.

- ➢ **Lab Members:** This role is the same as the Resource User role in the C.O.R.E.S. application. This role is for users who are working for a lab on specific tasks. Lab Members must be assigned access to fund numbers (aka center numbers) by the PI, Lab Manager or Department Manager.

- ➢ **Department Managers:** This is the same as the Department Administrator role in the C.O.R.E.S. application. This role is for anyone who needs to have financial or managerial oversight of a department, or needs to reconcile cores charges for the department. Department Managers have access to all of the invoices and reporting for all the labs within their department.

There are User Guides for each role, which can be found on our website on our <u>iLab User Guides and Forms</u> page.

If you have any questions, please feel free to contact us at <u>coresvu@vanderbilt.edu</u>.

1. **Setting Up a New Account – VU Users**

You can set-up your user account using your VUNet ID and password by going directly to iLab. Once your account has been created, a request for your association to the lab you have chosen will be sent to the appropriate parties. If you have trouble logging into your account, and cannot log in, please contact ilab-support@agilent.com. If your request to join a lab has not been approved within 24 hours, please contact VU Cores at coresvu@vanderbilt.edu.

To create a new account, please go to Vanderbilt's iLab landing page, and click on the [sign-up o] button. You will then be taken to a new window.

VU and VUMC users should click here to create an account.
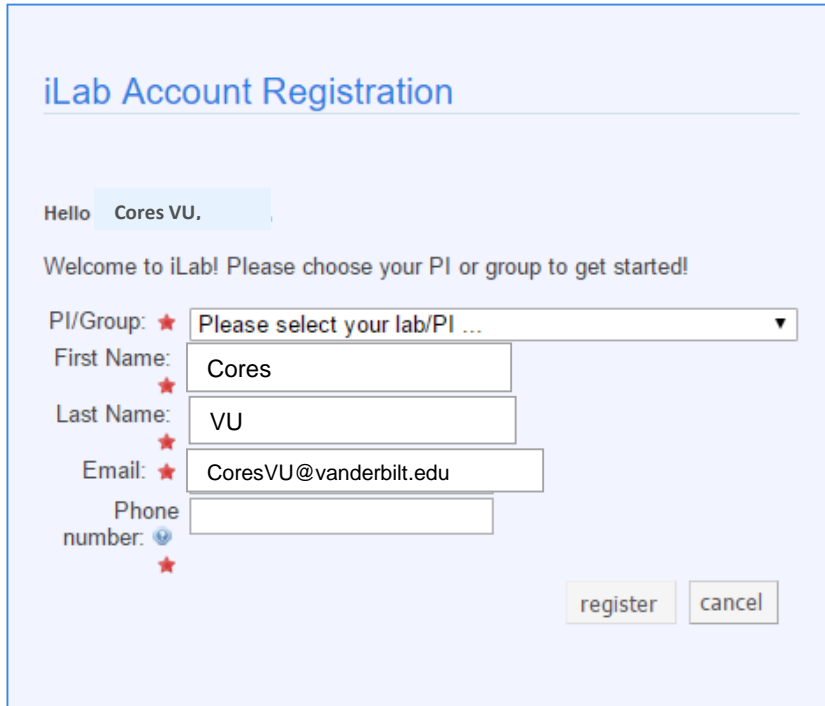
VUMC or VU user (with VUNet ID):
Click here to login or register using your institute login and password.

Not a VUMC or VU user? (no VUNet ID)
Click here to signup for an iLab account.

VU users will be taken to a screen to login using their VUNet ID and password. Your First Name, Last Name and Email address will be auto-populated, but you will be required to fill in your chosen PI/Group (Lab) and your Phone Number.

iLab Account Registration

Hello   Cores VU,

Welcome to iLab! Please choose your PI or group to get started!

PI/Group: ★   Please select your lab/PI ...
First Name: ★   Cores
Last Name: ★   VU
Email: ★   CoresVU@vanderbilt.edu
Phone number: ⊚ ★

[register] [cancel]

Please follow the instructions on the next page to select the correct lab based on your user role.

Lab Selection Instructions based on User Role:

Please look for special instructions below depending on the type of user account needed:

➢ **Principal Investigators:** Please look for your lab within the list. Your lab will be identifiable by your last name. If you cannot find your lab, please select the **PI Placeholder (VU) Lab** and then fill out this form. We will notify you once your lab has been created within iLab and is ready for you to use.

➢ **Lab Managers and Resource Users**: Please look for your PI in the list, and select your PI's lab. If you cannot find your PI in the list, then your PI needs to set up their account first. Please see above. Until they set up their account, you can select the **AAA Default (VU) Lab**. If you have submitted a request to the "**AAA Default (VU) Lab**," please fill out this form. *Please note*: Resource Users are called *Members* in iLab.

If you are a VU user, and are trying to join a lab at VUMC, please request to join the **AAA VUMC Default (VU) Lab**, the please fill out his form, that way we can direct your request to VUMC to be completed.

➢ **Department Managers/Administrators, Finance Managers, Core Admin, Core Staff**: Please look for the **Admin (VU) Lab**, under the Lab list, and request to join. Then please fill out this form to let us know which department or core you should be linked to. We will notify once you have been linked to the appropriate role.

1a. Setting Up a New Account – VUMC Users

VUMC Users (all roles): to utilize VU Cores with iLab, you will need to be a member of a (VU) Lab and VUMC Department within our institution. We will cover this more during our training.

❖ **VUMC Users with Active iLab Accounts:** Please go to our website and submit the appropriate form. Once this is received, we will have your account linked accordingly.

❖ **VUMC Users without an iLab Account:** Please follow the instructions from your institution to set up an account. Once this has been completed, please fill in the appropriate form, then we will have your account linked accordingly.

If you have any further questions, please contact us at coresvu@vanderbilt.edu.

2. **Logging into iLab**

Vanderbilt University's iLab site is: https://vanderbilt.corefacilities.org.
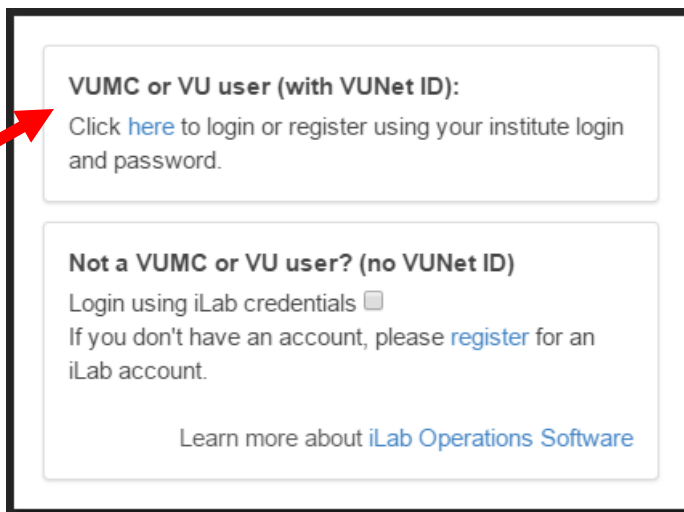
If you already have an account set up with iLab, you will not need to set up a new account. You can go to the website listed above and click the green **login** button.
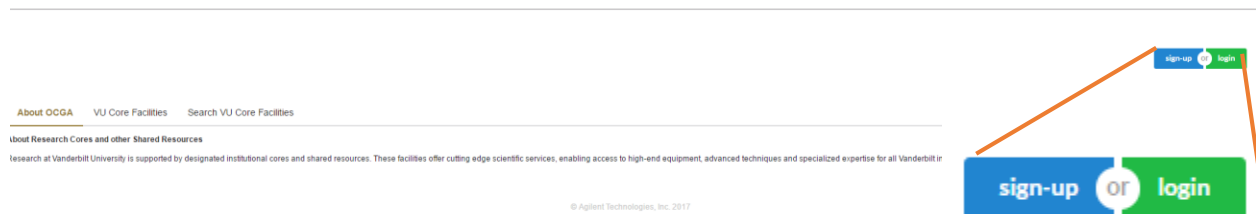
Once you click the **login** button, a new screen will pop up.

VU and VUMC users should click here to login with their VUNet ID and password.

VUMC or VU user (with VUNet ID):
Click here to login or register using your institute login and password.

Not a VUMC or VU user? (no VUNet ID)
Login using iLab credentials ☐
If you don't have an account, please register for an iLab account.

Learn more about iLab Operations Software

VU and VUMC users will then be taken to the sign on screen to enter their VUNet ID and password, and External users will be taken to a different screen to enter their iLab username and password.

Once a user is logged in, they will be able to navigate through different functions within iLab based on their user role permissions within iLab. Please refer to the specific user guides on our website for more detail as it pertains to your user role within iLab.

3. Navigating iLab – the basics

3.1 How to search for cores in iLab

**Figure 1: Left Menu Bar → "list all cores"** - this is where you can search for cores in iLab.
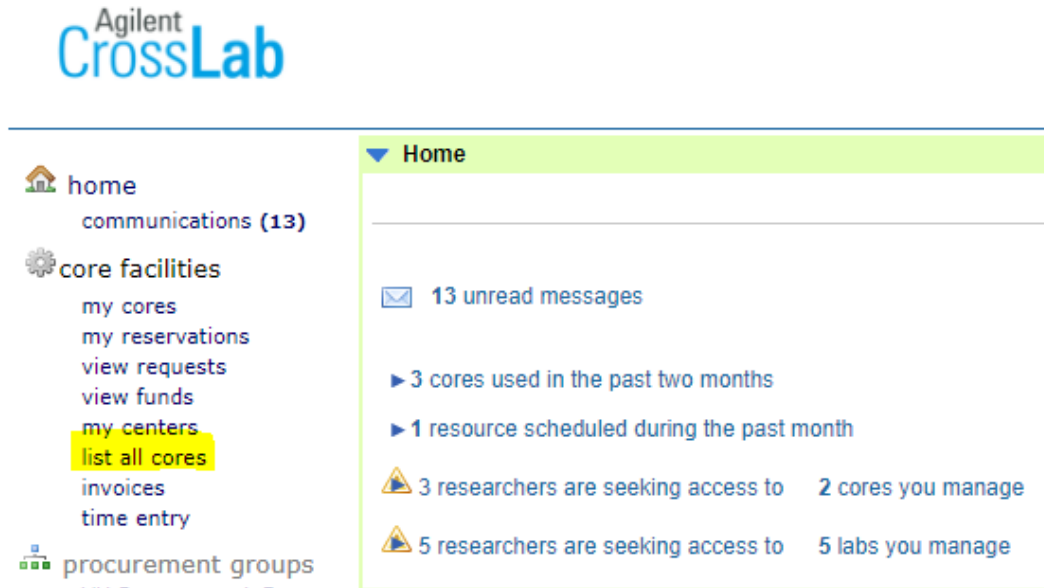
Once in the search for cores page, you can either view *Cores at Partner Institutions* (for VU user, this would be VUMC Cores, and for VUMC Cores, it would include VU Cores), or you can view *Cores at Other Institutions*. You can refine your search further by using the search bar to the right of the "View" drop down menu, and type in the type of core you are looking for using keywords.
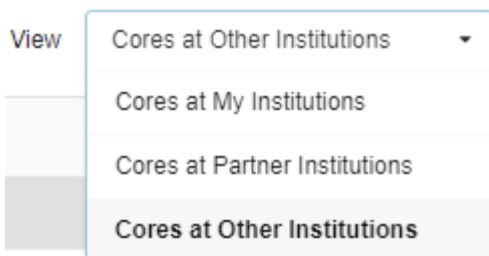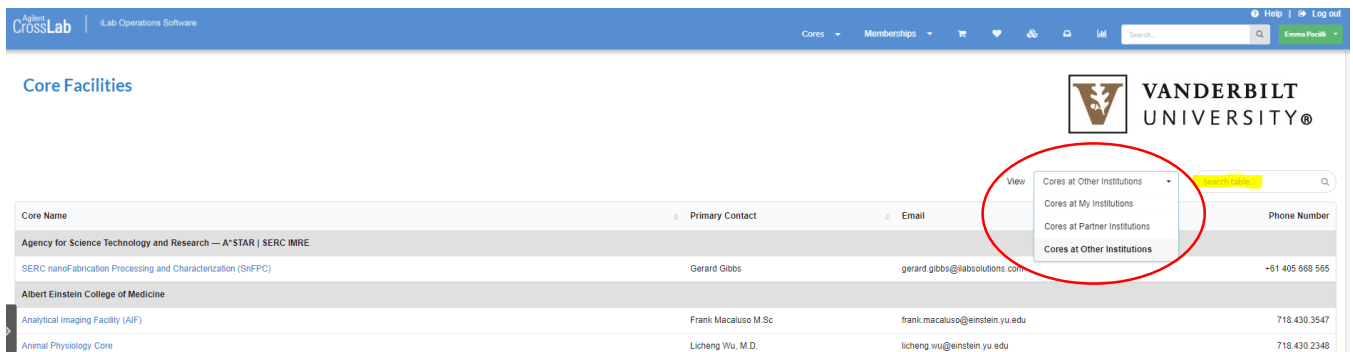
- Select *Cores at My Institutions* to search cores at VU.
- Select *Cores at Partner Institutions* to search cores at VUMC.
- Select *Cores at Other Institutions* to search cores that utilize iLab around the world.

You can also search any VU core that is currently live from our landing page using the two tabs below. You will only be able to see their public information from here. To access a core's iLab site directly, you can find the core's specific iLab link on our Core Facilities webpage.
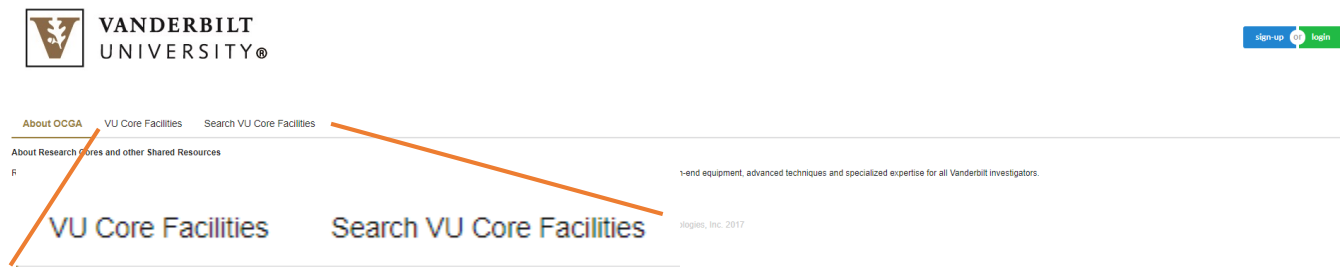
## 3.2 The top right corner menu bar

- **System Upgrades:** This link will take you to another page that lists all of the updates that have occurred, with the most recent set at the top.

- **HELP:** This link will allow you to submit a help ticket directly to iLab. You can use this if you are having trouble with your account.

- **My profile:** Here you can edit your own profile details. Please see Section 4 for more details.

- **Logout:** This will log you out of the system. When you are finished using iLab, please make sure you log out.

- **Search cores and services… search bar:** You can use this as a way to search for cores and services.

3.3 The left hand menu bar

The left hand menu bar is your main navigation tool within iLab. What appears will change for each user based upon your role within iLab. Please look at the explanations below that align with your role.

Department Managers/Administrators:
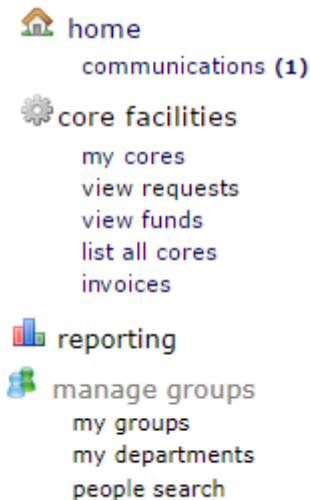
- "**home**" will take you to your dashboard.
- "**communications**" will list any communications you have. This is similar to the emails you receive from the system.
- "**core facilities**" will take you to the Core Facilities list of VU within iLab.
- "**view requests**" will populate if users of labs in your department have requests with core facilities, and will only show YOUR department's user requests.
- "**view reservations**" will populate if users of labs in your department have reservations with core facilities, and will only show YOUR department's user requests.
- "**view funds**" this will list the current fund numbers available to your department. Please check your user guide for more details.
- "**invoices**" will have all the invoices generated for the labs within your department.
- "**reporting**" allows you to create and generate reports as it relates to your department. Please watch the reporting tutorial offered by iLab.
- "**my groups**" will list any labs you are also a member of.
- "**my departments**" will list the departments you are a manager/administrator of.
- "**people search**" will allow you to search for VU an VUMC people who already

Principal Investigators and Lab Managers:
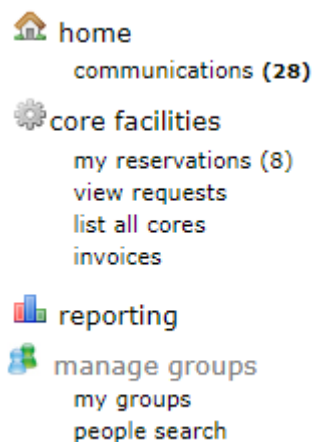
- "**home**" will take you to your dashboard.
- "**communications**" will list any communications you have. This is similar to the emails you receive from the system.
- "**core facilities**" will take you to the Core Facilities list of VU within iLab.
- "**view requests**" will populate if you, or users of your lab(s), have requests with core facilities, and will only show YOUR lab's user requests.
- "**my reservations**" will populate if you have any reservations with core facilities, and will only show YOUR reservations.
- "**invoices**" will have all the invoices generated for your labs.
- "**reporting**" allows you to create and generate reports as it relates to your department. Please watch the reporting tutorial offered by iLab.
- "**my groups**" will list any labs you are a member of.
- "**people search**" will allow you to search for VU an VUMC people who already have an iLab account.

4. Your iLab User Profile

If you click on the "**my profile**" link at the very top of the right hand corner of the screen, you will be taken to a new page where you can edit your profile.

Your options are listed below:

- **Profile Details:** Here you can edit your basic profile details. **Please Note** – It is important that your time zone is set correctly, or you may have issues with equipment reservations.
- **Billing / Shipping Information**: This is important for utilizing external cores.
- **Notification Settings:** This is in relation to a module that we do not have.
- **Default Ordering Settings**: You can set order default settings if desired.
- **Search Preferences:** This is what you would like to see in your order history on your dashboard page.
- **Projects**: This is in relation to a module that we do not have.
- **Labs**: list all the labs you are a member of.
- **Colleagues**: This will list any user profiles you have chosen to add as a colleague.