iLab Registration for PI’s and Lab Members

1. PI Registers in iLab
2. PI Requests Access to Fund Source
3. Lab Member Registers in iLab and Requests Access to PI’s Lab
4. PI Accepts Lab Member’s Request to Join their Lab
5. PI Assigns Lab Member a Fund Source so they may access Platform Services

Institute Admin. Approves
PI Registers in iLab (PIs Only)

3. PI Registers in iLab (PIs Only)

4. If the PI’s name does not appear in the dropdown, select “Admin (Monash) Lab” to notify iLab admins to create the new lab.
1. Please enter your account info in the following format: CostCentre-FundNumber (No space). Then click "Request".

2. Membership Requests & Funding Sources

3. Membership Requests

4. Request access to additional Funding Sources
Lab Member Registers in iLab (Lab Member)

Lab Member Registers in iLab (Lab Member)

3. Lab Member Registers in iLab (Lab Member)

4. iLab Account Registration

Hello Jane Researcher,
Welcome to iLab! Please choose your PI or group to get started!

PI/Group: John Smith (Monash) Lab
First Name: Jane
Last Name: Researcher
Email: jane.researcher@monash.edu
Phone number: 9905321

Register  Cancel

If the PI’s name does not appear in the dropdown, the PI must register and create their group before a user can be added.
PI Accepts Lab Member Request (PIs Only)

1. Home
   Communications (303)
   Manage Groups
   My Groups: Smith, John (Monash) Lab

2. Smith, John (Monash) Lab

3. Membership Requests & Funding Sources

4. Membership Requests
   - Date: Oct 15 '18
   - Name: Jane Researcher
   - Email: jane.researcher@monash.edu
   - Actions: Accept, Reject
Adding a New Lab Member (PIs Only)

1. Navigate to the iLab Operations Software.

2. Select the group "Smith, John (Monash) Lab".

3. Review the lab members and settings.

4. Invite additional members to the group.

5. Click on the "Invite" button.
PI Assigns Lab Member a Fund Source (PIs Only)

1. [Agilent CrossLab]
   - Home
     - Communications (303)
   - Core Facilities
     - My Cores
     - My Reservations
     - View Requests
     - View Funds
   - Manage Groups
     - My Groups: Smith, John (Monash) Lab

2. [Agilent CrossLab]
   - iLab Operations Software

3. [Memberships Requests & Funding Sources]

4. [Table]
   - Name: John Smith
     - Default Funding Source: None
     - M12345-678910
   - Name: Jane Researcher
     - Default Funding Source: None
     - M12345-678910
PI Assigns Lab Member a Fund Source (PIs Only)

1. Open the iLab Operations Software.

2. Navigate to the Manage Groups section and select John Smith (Monash) Lab.

3. Select Membership Requests & Funding Sources.

4. View the default funding sources for John Smith and Jane Researcher, both listed as 'None'.
Running a Report of Platform Charges (PIs Only)

Reports are useful ways to track spending and monitor your staff’s platform usage.

To run a report, open the left side menu and hover over “Reporting”. Select “Spending at all of my labs”.
Running a Report of Platform Charges (PIs Only)

In the “Reporting” window that opens there are 4 options for creating a report:

- **Charges**: Creation of reports for charges relating to all instrument use and service requests.
- **Requests**: Creation of reports ONLY for service requests.
- **Events**: Creation of reports ONLY for instrument bookings.
- **Custom Forms**: Can only be used by Platform Staff

When creating a report for the first time we must use the “Load Default” button to create a template that we can then save and load for later reports.
Running a Report of Platform Charges (PIs Only)

Apply the required settings:
1) “Select a date range” (the current month is the default), and
2) The “Select date field” which is to organise the data by Purchase date, Completing date, or Billing date.

Under “Customise display” click the “Charts and tables” button to choose the way the data is displayed, i.e. the type of graph or chart.
Running a Report of Platform Charges (PIs Only)

To edit any of these, click the yellow pencil tool and modify the chart or table using the dropdown menu to present the required data. Click the green tick to confirm. To remove the chart or graph, click the red X.

The order of the charts and tables can also be changed. Hover the mouse over the green arrows until the crosshair appears and then clicking and dragging that line to another position.

Click the “Add a new chart or table button” to add a new chart or table to the report, and to apply the settings click “Apply”.

When all settings have been applied, create the reports by clicking the “Run Report!” button. The reports will appear below.
Running a Report of Platform Charges (PIs Only)

The selected reporting graphs will then be shown on the refreshed pages. To get further information it is possible to see this by clicking or hovering over the graph segments.

To edit a report, hover over it with the mouse and click the pencil tool that appears and change it as above in “Charts and tables button”. Click “Apply” to apply the changes. You can also add a new chart or table. To remove that report, click the red X that appears when hovering over it.
Running a Report of Platform Charges (PIs Only)

It is possible to further refine these reports by using the filters on the left side. For example, to see the usage from a particular platform. Click “Apply Filters“ to update the charts.

Once all the settings have been created it is then possible to save and reuse them month-to-month for future reports. Click the “Save“ button and give the settings a name.

The next time the report is to be created, reload the settings by clicking the “Load saved” button and select it from the list. Change the date range and run the report.
Running a Report of Platform Charges (PIs Only)

To export the reports to a document, hover the mouse over the “Export” button. Choose the format by clicking in the dropdown menu. They can be saved as a pdf version of the current report view. The raw data can also be exported as an Excel CSV/XLS. Clicking on any of these items will automatically begin the download.