Idea Elan

GHENT UNIVERSITY

Infinity Core Management Software

2020

Lab Admin/PI Guide

Comprehensive Online Solution for Lab and Core Facility Management

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Quick Startup Guide

Links to recorded Training Webinar:

User Training Recording:

https://us02web.zoom.us/rec/share/v94yF-vy-jIOBaPu1W_dHZEhLNz7eaa8gCgWq_IExExHLCHCdcOrEW0BBay0w7rv

PI/Lab Admin Recording:

https://us02web.zoom.us/rec/share/6vR2BID0qExOAZHL0XHuZv8BJ7T-T6a81XRNqPZZn0Zry6cXYJ4fZTV_DHiXNhse

Login for Internal PI/Lab Admins:

PIs with a Ghent University login ID can use their credentials to login and will be redirected to the Infinity page.

1. Login via Citrix Athena

2. Login using: https://cfms.ugent.be

UGhent Registration and Login for External Users:

External users will use the Infinity page to register for a UGent Welkom account.

Users will fill out their information under "Get started, register here for free."

External Users link: https://secure9.ideaelan.com/UGhent/Public/AppLogin.aspx

- Enter First Name, Last Name and Email ID click on Join Now Button.
- After registering, a confirmation email will be send to your account.
- Click the link provided to set up your password.

- Once the password has been created, external users can login via the link
→ https://cfms.ugent.be

WACHTWOORD.UGENT.BE

UNIVERSITEIT
GENT

Het wachtwoord is succesvol gewijzigd

Het wachtwoord is succesvol gewijzigd. Het kan 5 minuten duren voordat je nieuwe wachtwoord actief is. Met je nieuw gekozen wachtwoord kan je je niet meer aanmelden vanaf toestellen en bij toepassingen die je oude wachtwoord hebben opgeslagen. Lees dit!

Hulp nodig?

Lees meer over het UGent wachtwoord op de helpdesksite.
Bij problemen met uw wachtwoord kan u terecht bij Accountbeheer.

Infinity Functionalities:

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

- Once logged into INFINITY as a PI, a toolbar with tabs will appear that are specific to your role.
- The "9 square box" tool provides the quick links to access facilities, contact Idea Elan, Facility admins, Help files etc.

User Functions:

1. **My Items List:** with quick links to homepage icons, my favorite instruments, favorite requests, etc.
2. **View a home page** that has specified favorite instruments and sample submissions, reservations, submitted samples, issues, service requests, and user profile.
3. **View Instruments** in a facility and make reservations under the instrument tab.
4. **Submit sample forms/service requests** for processing in Request Services tab.
5. **Supply orders** for new supplies from facilities under the supplies tab.
6. **Lab Admin**: To access all the lab admin features
7. **Select the facility** from dropdown to get access to other facilities that you have access to
8. **Switch to User** allows lab admins to switch to other users
9. **Start page**: Click here you can make your current page as the start page.

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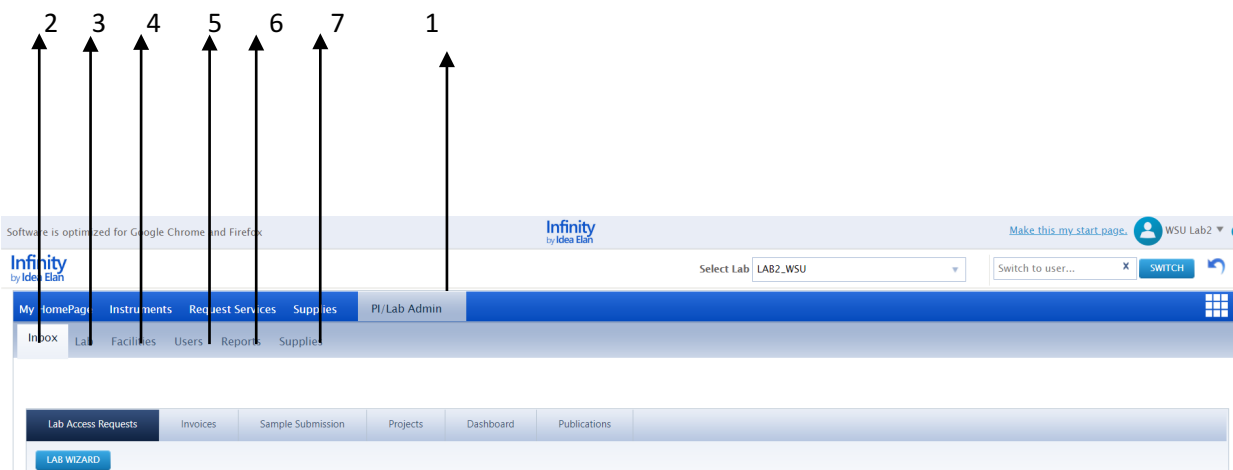
1. **Lab Admin**: To access all the lab admin features
2. **Inbox**: To view, accept/reject requests or approve invoices or quotes
3. **Lab**: To add lab information, billing details such as account codes/ PO Numbers, and to access lab settings.
4. **Facilities**: To view and request access to various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

Inbox Functions:
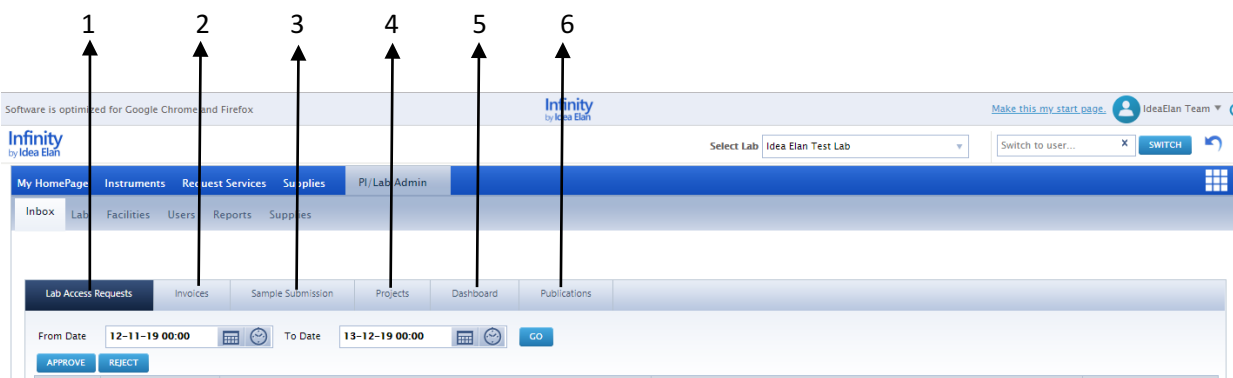
1. Lab Access Requests:

To view, accept and reject user requests to the lab.
    Click on the √ or the X to accept or reject user access to the lab

Lab Access Requests **1** | Invoices | Sample Submission | Projects | Dashboard | Publications

| From Date | 12-11-19 00:00 | | To Date | 13-12-19 00:00 | | GO |

APPROVE | REJECT

	User Image	Email Address	User Name	Status
		Search here ✕	Search here ✕	All ▼
☐	👤	U2_UG@outlook.com		✓ ✗ Pending
☐	👤	jana@ideaelan.com	Jana	✓ Active
☐	👤	teamidealean@gmail.com	IdeaElan Team	✓ Active

2. Invoices:

Invoices can be viewed under the Inbox →Invoice tab. Once the facility has dispatched the invoice to your lab, you can edit /mark for review, or approve the invoice.

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

Inbox | Lab | Facilities | Users | Reports | Supplies

Lab Access Requests | Invoices **1** | Sample Submission | Projects | Dashboard | Publications

Date Range | Monthly ▼ | December ▼ | 2019 ▼ | GO

Date Created	Invoice Number	Facility Name	Lab Type	Type	Status
	Search here ✕	Search here ✕	Search here ✕	Search here ✕	All ▼
05-12-19	FREDTESTC0512_12_2019_Tom Taghon Lab (Sponsor)_34	Flow Cytometry	Internal	Lab	Dispatched

1. Click on the invoice name to view the transactions.

APPROVE INVOICE

Transactions

☐ Select All	Status	User	Lab	Account Code	Service Type	Name	Date	Description	Quantity(hours,# of samples,supplies or services)	Rate(price per hour or unit)	Total
	All ▼	Search h ✕	Search h ✕	Search here ✕	Search here ✕	Search here ✕		Search here ✕	Search h ✕	Search here ✕	
☐	Accepted	Jana	Idea Elan Test Lab	D/12345/02--IV2	UnAssisted Session	Flow Cytometry:BD LSR II – 1MRBII (B/R/YG/V)	11-12-19	Session between 2019-11-04 10:00:00 and 2019-11-04 12:00:00	2:00	00:00 To 24:00 Fee: 30.00 Price Per Hour	60.00
☐	Accepted	Jana	Idea Elan Test Lab	D/12345/02--IV2	UnAssisted Session	Flow Cytometry:BD LSR II – 1MRBII (B/R/YG/V)	11-12-19	Session between 2019-11-06 11:00:00 and 2019-11-06 13:00:00	2:00	00:00 To 24:00 Fee: 30.00 Price Per Hour	60.00
☐	Accepted	Jana	Idea Elan Test Lab	D/12345/02--IV2	UnAssisted Session	Flow Cytometry:BD LSR II – 0MRBII (B/R/V)	11-12-19	Session between 2019-11-11 11:45:00 and 2019-11-11 13:30:00	1:45	00:00 To 24:00 Fee: 30.00 Price Per Hour	52.50
☐	Accepted	Jana	Idea Elan Test Lab	D/12345/02--IV2	UnAssisted Session	Flow Cytometry:BIORAD S3e – 1MRBII (B/R)	11-12-19	Session between 2019-11-13 17:00:00 and 2019-11-13 18:45:00	1:45	00:00 To 24:00 Fee: 55.00 Price Per Hour	96.25
☐	Accepted	Jana	Idea Elan Test Lab	D/12345/02--IV2	Assisted Session	Flow Cytometry:BIORAD S3e – 1MRBII (B/R)	11-12-19	Session between 2019-11-13 19:00:00 and 2019-11-13 20:30:00	1:30	00:00 To 24:00 Fee: 105.00 Price Per Hour	157.50

2. Mark the transactions for review by checking the box next to the transaction and then selecting an action. You can also submit a message to the Facility using the message box. Click submit when finished.

3. Once transactions have been marked for review the Facility Admin will make correction and you will see the charges marked in green

4. Approve the invoice by clicking Approve Invoice

3. Sample Submissions:

To view sample submissions/service requests for the lab in different status.

Approve quotes send over by the Facility Admin by clicking on the forms and scrolling down to change the status.

4. Projects:

View all projects for the lab.

5. Dashboard:

Displays a quick overview of the number of samples submitted, instrument reservations and supply orders made.
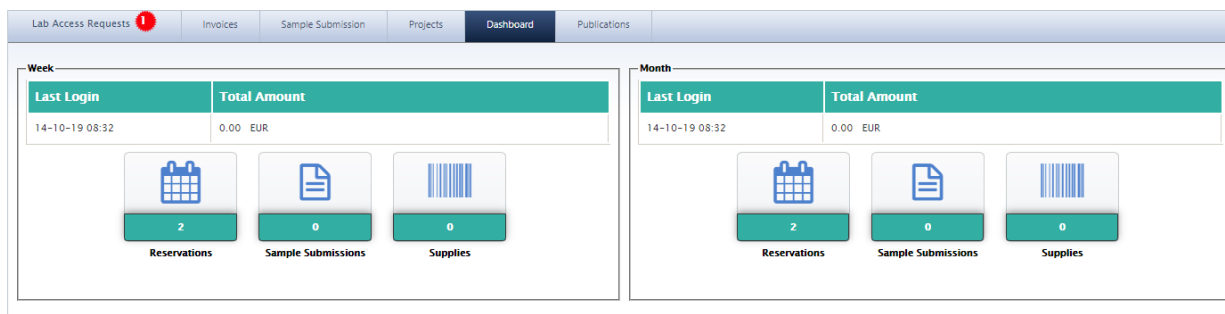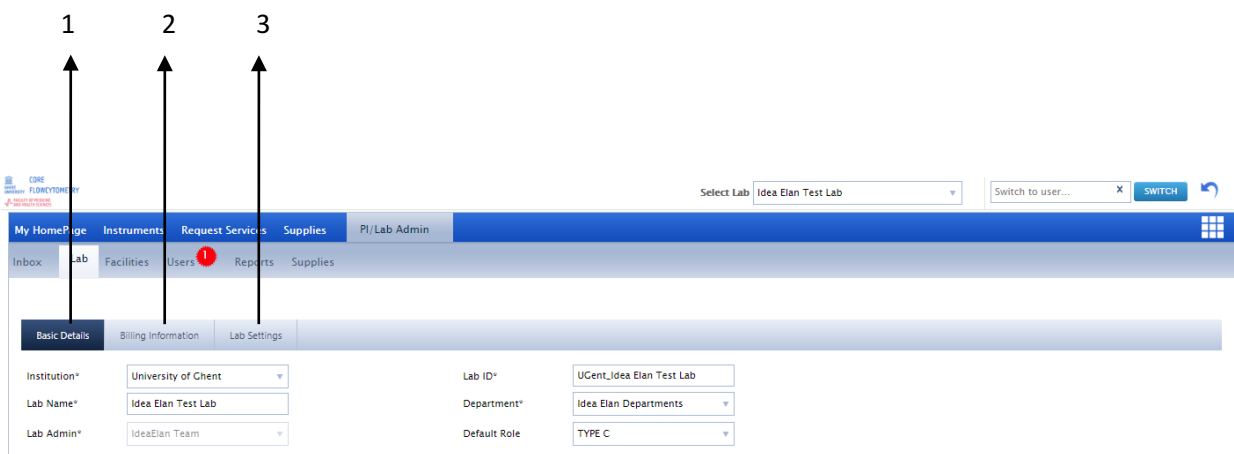
6. Publications:

Displays the publications by the users

Title	Journal	Published Year	Authors	Instrument Names
Randomized controlled study of aerosolized hypertonic xylitol versus hypertonic saline in hospitalized patients with pulmonary exacerbation of cystic fibrosis.	Journal of cystic fibrosis : official journal of the European Cystic Fibrosis Society	2019	Joseph Zabner	

Tabs shown: Lab Access Requests | Invoices | Sample Submission 3 | Projects | Dashboard | **Publications**

Since: 2019 ▼ GO

Lab Details:

1   2   3

Institution*	University of Ghent ▼	Lab ID*	UGent_Idea Elan Test Lab
Lab Name*	Idea Elan Test Lab	Department*	Idea Elan Departments ▼
Lab Admin*	IdeaElan Team ▼	Default Role	TYPE C ▼

1. Basic Details:

Fill out Lab Name (First name Last name of the PI), Lab ID, select Department affiliation and choose default user role as well as addresses. You can also add existing users in Infinity to your lab.

2. Billing Information:

View account codes or PO Numbers and assign account codes to selected users.

Account Code Settings:

Choose between 2 options
1. All users can use any account code
2. Specific account code for each user

- If you choose to assign account codes to your users, select that option and click 'update' at the bottom of the screen.
- Go to the User tab and click on the pencil next to the user's name

User Image	Email Address	User Name	Show WSU Index Number/PO Numbers	Status	Add WSU Index Number/PO Numbers
	Search here ✕	Search here ✕	Search here ✕	All ▾	
👤	U1_WSU@yahoo.com	Joseph Zabner	635351,345678,temporary,Index (207654)	✅ Active	✏️

- The 'Assign account code" window will pop up and you can choose the code and for which facility it should be used

INFINITY Assign Account Code

Account Code*	D/00300/02 --IV2 ▾
Email	TestUser@Gmail.com
Facility*	2 items checked ▾

ADD

🔄 Refresh

Name	Account Code	Project(s)	Expiration date	Facility		
	D/00250/02--IV2		31-12-21	Veterinary Medicine – Flow Cytometry	✏️	✕

CLOSE

- Click on 'Add' to assign the account code
- You'll have to go through the same steps for every user in the lab

3. 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; and a 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, it is completed by the facility admin.
- **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.

Basic Details	Billing Information	Lab Settings

Lab Settings

- ○ Set Max [   ] EUR for a user
- ● No Max EUR for a user

- ☐ Lab Admin Alternative [Select Users ▾]
- ☐ Auto approve all users

- ☐ Sample submissions can be shared among users within the lab.

- ● All invoices need to be manually approved
- ○ Auto approve invoices that are less than [   ] EUR
- ○ Auto approve all invoices

Sample Submission / Supplies / Project Approval Process

Sample Submission	Case 1 ▾	☑ User can also approve
Supplies	Case 1 ▾	
Project	Case 1 ▾	

Case 1 ✏

User	Lab Admin	Facility Admin
Submits Sample Submission Form / Order / Project	Approves	Completes

Case 2 ✏

User	Facility Admin
Submits Sample Submission Form / Order / Project and it is auto approved	Completes

Case 3 ✏

User	Facility Admin
Submits Sample Submission Form / Order / Project	Creates Quote If Quote / Order amount <= Max EUR Limit set for user then approve the quote If Quote / Order amount > Max EUR Limit then Lab Admin needs to approve Completes

Case 4 ✏

User	User Type	
Submits Sample Submission Form / Order / Project	External :	Case 1 ▾
	Internal :	Case 1 ▾

4. Notifications

Set up notification setting

Notifications ✏

| ☐	Notification Message
☐	User submits sample submission form that is auto approved based on lab settings ⍰
☐	Facility Admin submits quote for a sample submission ⍰
☐	Facility Admin submits a quote for a sample submission that is auto approved based on lab settings ⍰
☐	Lab admin denies a Quote ⍰
☐	Lab Admin changes the status to Quote in Review ⍰
☐	Lab Admin/ User approves a Quote ⍰
☐	Facility Admin changes the sample submission status to "In Progress" ⍰
☐	Facility Admin changes the sample submission status to "Complete & Ready to be Billed" ⍰
☐	Sample Request Cancelled ⍰
☐	Institution Admin reopens a sample form ⍰
☐	Admin changes the status of individual records as Reviewed/ Accepted/ In Review ⍰
☐	Invoice Dispatched to Lab Admin ⍰
☐	Invoice approved automatically based on lab settings ⍰
☐	Admin makes a change to the supply order status ⍰
☐	Facility Admin approves or rejects a facility access request ⍰

Facilities:

View and request access to various facilities listed.

Users:

All users affiliated with the lab are listed under the users tab. Users can also be removed from the lab by clicking on the green check mark to 'inactivate'.

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

Reports

Various reports can be generated for the lab, such as lab based / project-based reports. For example: Expenses over period, Invoice based reports or Usage reports.

Select the report type, choose the required month and click on run report. Options to save the report are available. You can also export the report as a Word or PDF document.

Supplies

The Lab admin/PI can view all orders made by the users of that lab.