



**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-jlOBaPu1W\\_dHZEhLNz7eaa8gCgWq\\_IExExHLCHCdcOrEW0BBay0w7rv](https://us02web.zoom.us/rec/share/v94yF-vy-jlOBaPu1W_dHZEhLNz7eaa8gCgWq_IExExHLCHCdcOrEW0BBay0w7rv)

PI/Lab Admin Recording:

[https://us02web.zoom.us/rec/share/6vR2BID0qExOAZHL0XHuZv8BJ7T-T6a81XRNqPZZn0Zry6cXYJ4fZTV\\_DHiXNhse](https://us02web.zoom.us/rec/share/6vR2BID0qExOAZHL0XHuZv8BJ7T-T6a81XRNqPZZn0Zry6cXYJ4fZTV_DHiXNhse)

zoom UGhent - Infinity Go-Live Webinar for Users - Shared screen with speaker view



Idea Elan LLC

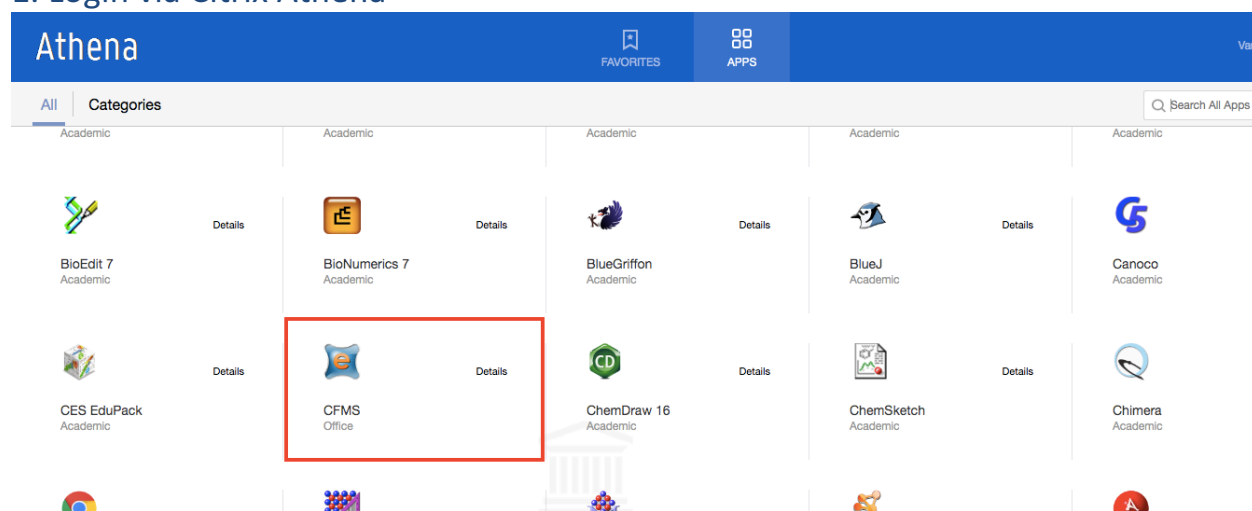
**Ghent University  
Infinity User Go-Live Webinar**

www.IdeaElan.com  
Contact@IdeaElan.com  
1(800)5065905

## 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



The screenshot displays the Citrix Athena application catalog. The top navigation bar includes 'Athena', 'FAVORITES', 'APPS', and 'Venu'. Below the navigation bar, there is a search bar labeled 'Search All Apps'. The main content area is organized into a grid of application tiles, each representing an application available for use. The tiles are categorized under 'Academic'. The 'CFMS Office' tile is highlighted with a red border, indicating the application to be used for login.

Application Name	Category
BioEdit 7	Academic
BioNumerics 7	Academic
BlueGriffon	Academic
BlueJ	Academic
Canoco	Academic
CES EduPack	Academic
CFMS Office	Academic
ChemDraw 16	Academic
ChemSketch	Academic
Chimera	Academic

### 2. Login using: <https://cfms.ugent.be>



The screenshot shows the UGent CAS login form. The form is titled 'UGent CAS' and has a blue background. It contains two input fields: 'Username' and 'Password'. Below the input fields is a yellow 'Log in' button.

UGent CAS

Username

Password

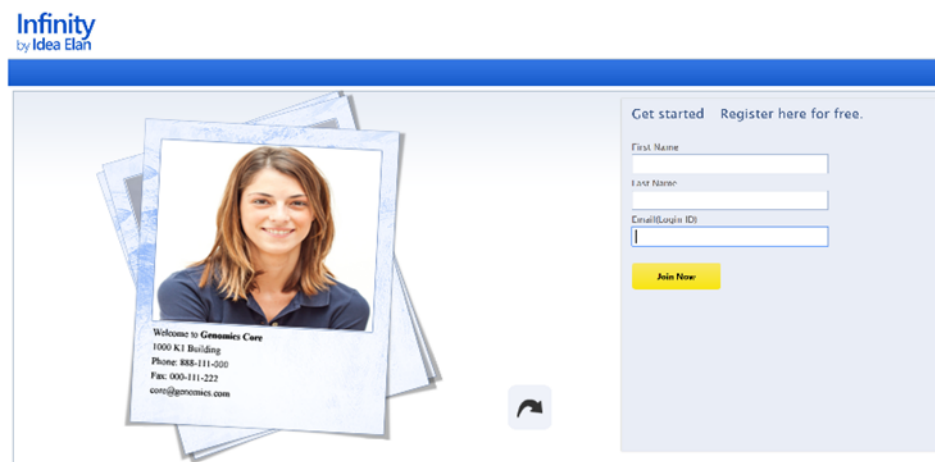
Log in

## 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.



### CFMS Registratie/Registration

U bent uitgenodigd op het CFMS-platform van de Universiteit Gent.

Uw CFMS-loginnaam (gebruikersnaam) is:

Om uw CFMS-account te activeren, moet u een wachtwoord instellen. Klik op onderstaande link of kopieer deze in je browser:

[https://wachtwoord.ugent.be/validateAccountActivationToken?token=f9d13d22-f9a9-11e9-ab0a-aa000090033c& locale=nl&username=donot\\_reply%40ideaelan.com](https://wachtwoord.ugent.be/validateAccountActivationToken?token=f9d13d22-f9a9-11e9-ab0a-aa000090033c& locale=nl&username=donot_reply%40ideaelan.com)

U vindt het CFMS-platform via volgende link: [CFMS-platform](#)

Volg de instructies op het platform om de registratie te voltooien. Bij problemen kan u contact opnemen met uw facility admin.

Met vriendelijke groeten,  
Universiteit Gent

\*\*\*\*\*

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



## WACHTWOORD.UGENT.BE

### 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.

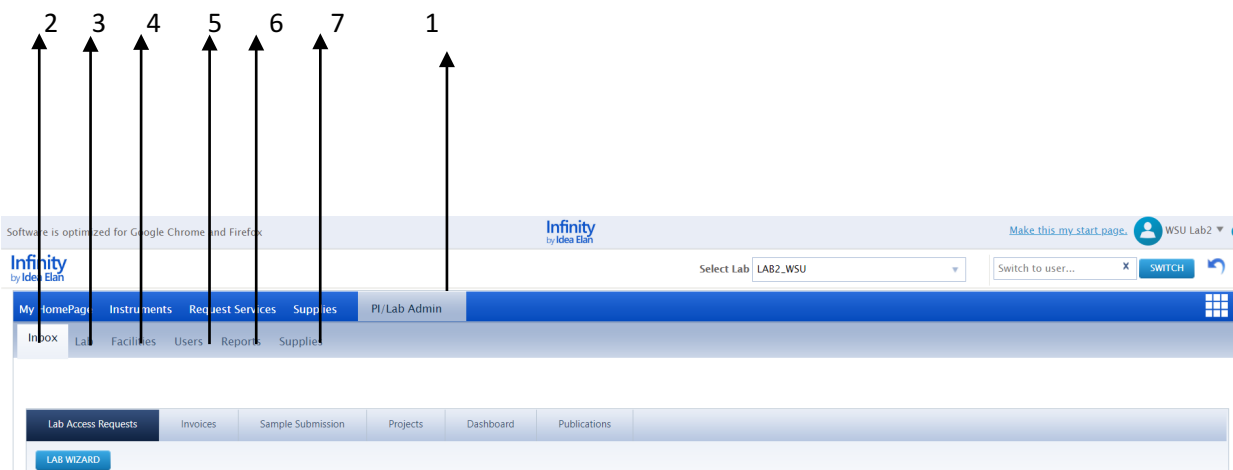
- Once logged into INFINITY as a PI, a toolbar with tabs will appear that are specific to your role.
- The “9 square box” tool provides the quick links to access facilities, contact Idea Elan, Facility admins, Help files etc.

## User Functions:



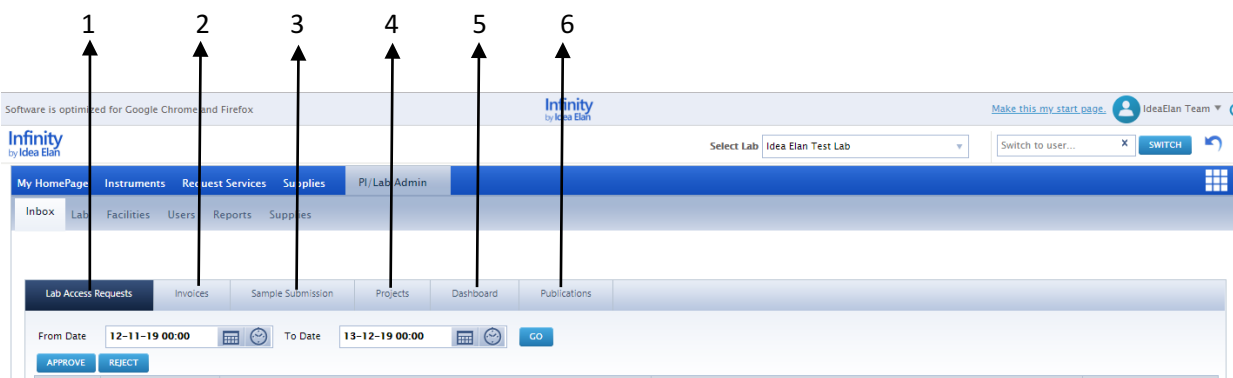
1. **My Items List:** with quick links to homepage icons, my favorite instruments, favorite requests, etc.
2. **View a home page** that has specified favorite instruments and sample submissions, reservations, submitted samples, issues, service requests, and user profile.
3. **View Instruments** in a 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 V 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: 12-12-19 00:00 | GO

APPROVE | REJECT

<input type="checkbox"/>	User Image	Email Address	User Name	Status
<input type="checkbox"/>		<a href="mailto:U2_UG@outlook.com">U2_UG@outlook.com</a>		Pending
<input type="checkbox"/>		<a href="mailto:jana@ideaelan.com">jana@ideaelan.com</a>	Jana	Active
<input type="checkbox"/>		<a href="mailto:teamideaelan@gmail.com">teamideaelan@gmail.com</a>	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
05-12-19	FREDTESTC0512_12_2019_Tom Taohon Lab (Sensor)_34	Flow Cytometry	Internal	Lab	Dispatched

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

**APPROVE INVOICE**

Transactions

<input type="checkbox"/>	Status	User	Lab	Account Code	Service Type	Name	Date	Description	Quantity (hour s, # of samples, suppl- ies or services)	Rate (price per hour or unit)	Total
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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.

Mark selected rows for review  
 Actions  Mark selected rows as reviewed  
 Mark selected rows as accepted

Message

**SUBMIT**

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

Select All	Status	User	Lab	Account Code	Service Type	Name	Date	Description	Quantity(hour s,# of samples, supplies or services)	Rate(price per hour or unit)	Total
<input type="checkbox"/>	Reviewed	U3_UG@outlook.com	Tom Taghon Lab	TEST14-11(TEST14-11-TEST14-11-IV2)	UnAssisted Session	Flow Cytometry:BD FORTESSA X-20 OMRBII (B/R/YC/V/UV)	21-11-19	Session between 2019-11-21 15:15:00 and 2019-11-21 15:45:00	0:30	00:00 To 24:00 Fee: 40.00 Price Per Hour	20.00
<input type="checkbox"/>	Accepted	U3_UG@outlook.com	Tom Taghon Lab	TEST14-11(TEST14-11-TEST14-11-IV2)	UnAssisted Session	Flow Cytometry:BD FORTESSA X-20 OMRBII (B/R/YC/V/UV)	22-11-19	Session between 2019-11-22 11:30:00 and 2019-11-22 12:30:00	1:00	00:00 To 24:00 Fee: 40.00 Price Per Hour	40.00
<input type="checkbox"/>	Accepted	U3_UG@outlook.com	Tom Taghon Lab	TEST14-11(TEST14-11-TEST14-11-IV2)	UnAssisted Session	Flow Cytometry:BD FORTESSA X-20 OMRBII (B/R/YC/V/UV)	28-11-19	Session between 2019-11-28 11:00:00 and 2019-11-28 12:30:00	1:30	00:00 To 24:00 Fee: 40.00 Price Per Hour	60.00
<input type="checkbox"/>	Accepted	U3_UG@outlook.com	Tom Taghon Lab	TEST14-11(TEST14-11-TEST14-11-IV2)	Assisted Session	Flow Cytometry:BD FORTESSA X-20 OMRBII (B/R/YC/V/UV)	29-11-19	Session between 2019-11-29 08:30:00 and 2019-11-29 09:00:00	1:15	0.00	0.00

4. Approve the invoice by clicking Approve Invoice

**APPROVE INVOICE**

### 3. Sample Submissions:

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

Date	Service Id	Form Name	User	Service Type	Project Name	Status
12-01-19 05:06 PM		<a href="#">Histology Service Request Form</a>	WSU User2	Sample		Quote Provided Next: Waiting for Approval by PI / User <div style="width: 20%; background-color: #ccc; height: 10px;"></div> 20% completed
11-26-19 09:27 AM		<a href="#">MI Neonatal Service Request Form</a>	WSU User2	Service		Quote Provided Next: Waiting for Approval by PI / User <div style="width: 20%; background-color: #ccc; height: 10px;"></div> 20% completed
11-21-19 07:15 AM	7498374	<a href="#">Neonatal Request_2019-11-22 09:30:06_2019-11-22 09:30:33</a>	WSU User2	Service		Complete & Ready to be billed Next: Waiting to be Invoiced <div style="width: 90%; background-color: #ccc; height: 10px;"></div> 90% completed

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

**Change Sample Submission Status**

Current Status: **Quote**  
Next: Waiting for approval by User/PI

Comments:

Upload Files:  **SELECT**

**APPROVE QUOTE** **REVIEW QUOTE** **DENY** **CANCEL SAMPLE SUBMISSION**

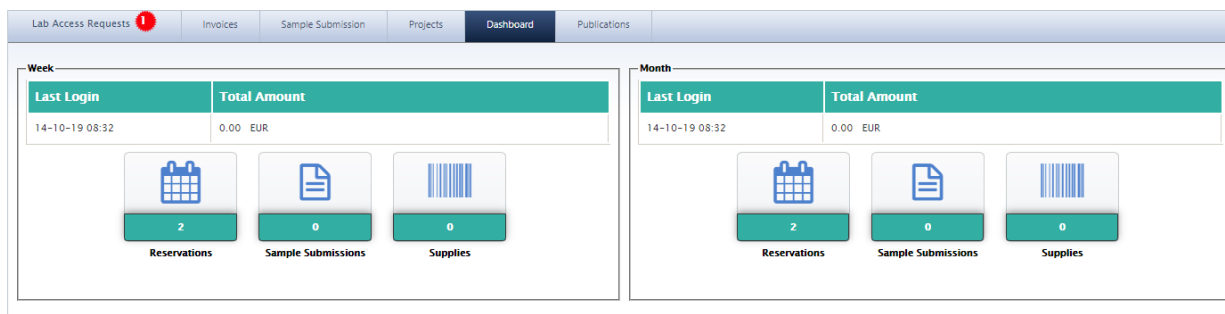
#### 4. Projects:

View all projects for the lab.

Project Name	Project Id	Start Date	End Date	Created By
<a href="#">Behavior and Field Research</a>	5	10-18-19	01-18-20	Atabong Amindeh
<a href="#">CT Study</a>	4	10-17-19	01-17-20	Super Admin
<a href="#">CMT</a>	3	10-16-19	01-16-20	Super Admin
<a href="#">CP Study</a>	2	10-14-19	01-14-20	Super Admin

#### 5. Dashboard:

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

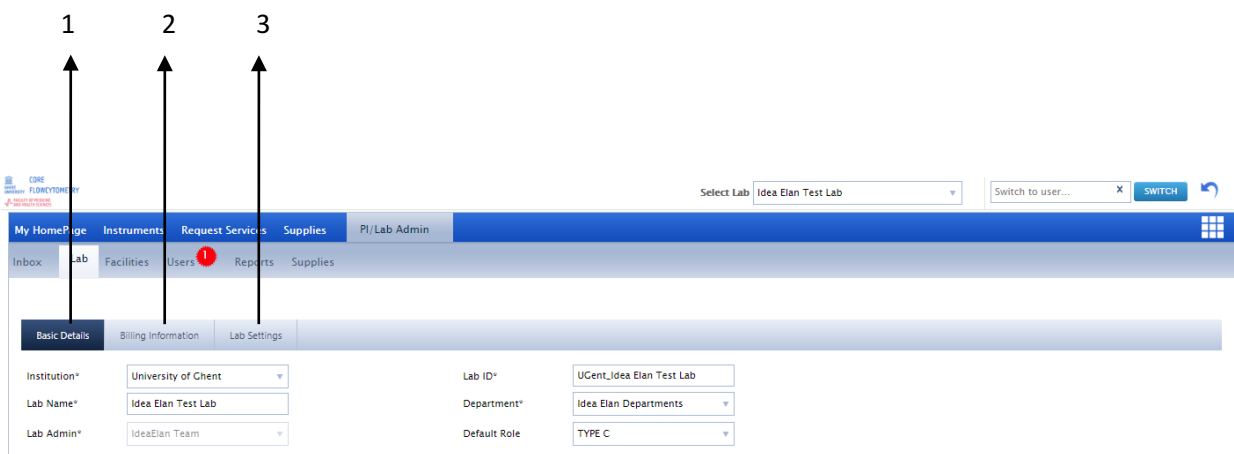


## 6. Publications:

Displays the publications by the users

Lab Access Requests   Invoices   Sample Submission <span style="color: red;">3</span>   Projects   Dashboard   <b>Publications</b>				
Since: 2019 <input type="button" value="GO"/>				
Title	Journal	Published Year	Authors	Instrument Names
<a href="#">Randomized controlled study of aerosolized hypertonic xylitol versus hypertonic saline in hospitalized patients with pulmonary exacerbation of cystic fibrosis.</a>	Journal of cystic fibrosis : official journal of the European Cystic Fibrosis Society	2019	Joseph Zabner	

## Lab Details:



The screenshot shows the 'Lab Details' page in the Idea Elan system. The page is divided into several sections:

- Navigation Bar:** Includes 'My HomePage', 'Instruments', 'Request Services', 'Supplies', and 'PI/Lab Admin'. A dropdown menu shows 'Select Lab: Idea Elan Test Lab' and a 'Switch to user...' button.
- Sub-headers:** 'Inbox', 'Lab', 'Facilities', 'Users', 'Reports', and 'Supplies'. The 'Users' tab has a red notification badge with the number '1'.
- Form Fields:**
  - Institution\*:** University of Ghent
  - Lab Name\*:** Idea Elan Test Lab
  - Lab Admin\*:** IdeaElan Team
  - Lab ID\*:** UGent\_Idea Elan Test Lab
  - Department\*:** Idea Elan Departments
  - Default Role:** TYPE C

Three numbered callouts (1, 2, 3) with arrows point to the 'Request Services', 'Users', and 'Reports' tabs in the sub-header area.

### 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.

Basic Details | Billing Information | Lab Settings

Institution\*  Lab ID\*   
 Lab Name\*  Department\*   
 Lab Admin\*  Default Role

Address

Shipping Address

Address:   
 City:   
 State:   
 Zip Code:   
 Country:   
 Phone:

Billing Address

Same as shipping address

Address:   
 City:   
 State:   
 Zip Code:   
 Country:   
 Phone:

Add users

Available to Select

Select: [All](#) | [None](#)

- Benedicte(Benedicte.Descamps@ugent.be)
- Christian(Christian.Vanhove@ugent.be)
- Dieter(dieter.buyst@ugent.be)
- Filip(Filip.Verhaert@ugent.be)
- Frédéric(Frederic.Clement@Ugent.be)

Selected

Select: [All](#) | [None](#)

- Jana(jana@ideaelan.com)

## 2. Billing Information:

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

Basic Details | Billing Information | Lab Settings

Account Code Settings

All users can use any account code  
 Specific account code for each user

Lab Type

Internal  External PO

Enter number of Account Codes to add :

Name	Project(s)	Expiration Date *	Cost center	WBS Element	Order	Fund
<input type="text"/>	<input type="text" value="Select Project"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		31-12-25		D/12345/02		IV2
		31-12-21		D/00250/02		IV2
		31-12-20		D/00300/02		IV2



Import from

Export to  | Export to  | Export to

## 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
	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	All	
	<a href="mailto:U1_WSU@yahoo.com">U1_WSU@yahoo.com</a>	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\*

Email

Facility\*

**ADD**

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

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:   User can also approve  
 Supplies:   
 Project:

---

**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: <input type="text" value="Case 1"/> Internal: <input type="text" value="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.




Inbox Lab **Facilities** Users Reports Supplies

Search Facility	Institution	Facility Type	City	
Search here x	Search here x	Search here x	Search here x	
Infinity Lab Current Status: <span style="color: green;">Approved</span> <a href="#">Make a Reservation</a> <a href="#">Submit Samples</a> <a href="#">Order Supplies</a>	University of Ghent	Default Category, In-Vivo Imaging	GENT	
Flow Cytometry Current Status: <span style="color: green;">Approved</span> <a href="#">Make a Reservation</a> <a href="#">Submit Samples</a> <a href="#">Order Supplies</a>	University of Ghent	Flowcytometry Acquisition	GENT	

## 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'.

User Image	Email Address	User Name	Show Account Code/PO Numbers	Status
	Search here x	Search here x	Search here x	All
	<a href="mailto:Benedicte.Descampos@ugent.be">Benedicte.Descampos@ugent.be</a>	Benedicte	All	
	<a href="mailto:Christian.Vanhove@ugent.be">Christian.Vanhove@ugent.be</a>	Christian	All	
	<a href="mailto:Frederic.Clement@ugent.be">Frederic.Clement@ugent.be</a>	Frédéric	All	
	<a href="mailto:F1_UG@yahoo.com">F1_UG@yahoo.com</a>	UG_Fac1	All	
	<a href="mailto:L3_UG@outlook.com">L3_UG@outlook.com</a>	UG_Lab3	All	

Export to  Export to  Export to 

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.




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

My Favorite Instruments | My Favorite Requests | My Reservations | My Requests | My Supplies | My Projects | My Reports | My Profile | My Dashboard | My Publications | My Agenda



Lab Based Reports



Project - Lab Based Reports

**Expenses Over Period**

Inventory

Month Over Month Usage Report

Expenses Month Over Month

Invoice Based Report

Usage Report

Facility Based Expenses

**Filter Options**

Select saved report selection(s)

Report Name:  ?

Date Range:

Select All

Account Code

Note : By default the report will be generated for all the attributes. Please check the checkbox beside the attribute to filter the report.

## Supplies

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

Infinity  
by Idea Elan

Select Lab: Idea Elan Test Lab | Switch to user... | SWITCH

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

Inbox | Lab | Facilities | Users | Reports | **Supplies**

Order Number	Order Date	Last Updated Date	Description	Placed By	Product Total	Total Order Amount	Status
<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="select here"/>
No supplies are listed for this lab.							