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PI/Lab Admin guide for UND

Comprehensive Online Solution for Lab and Core Facility Management

**INFINITY Software Lab Admin Guide**

**Idea Elan**

2020

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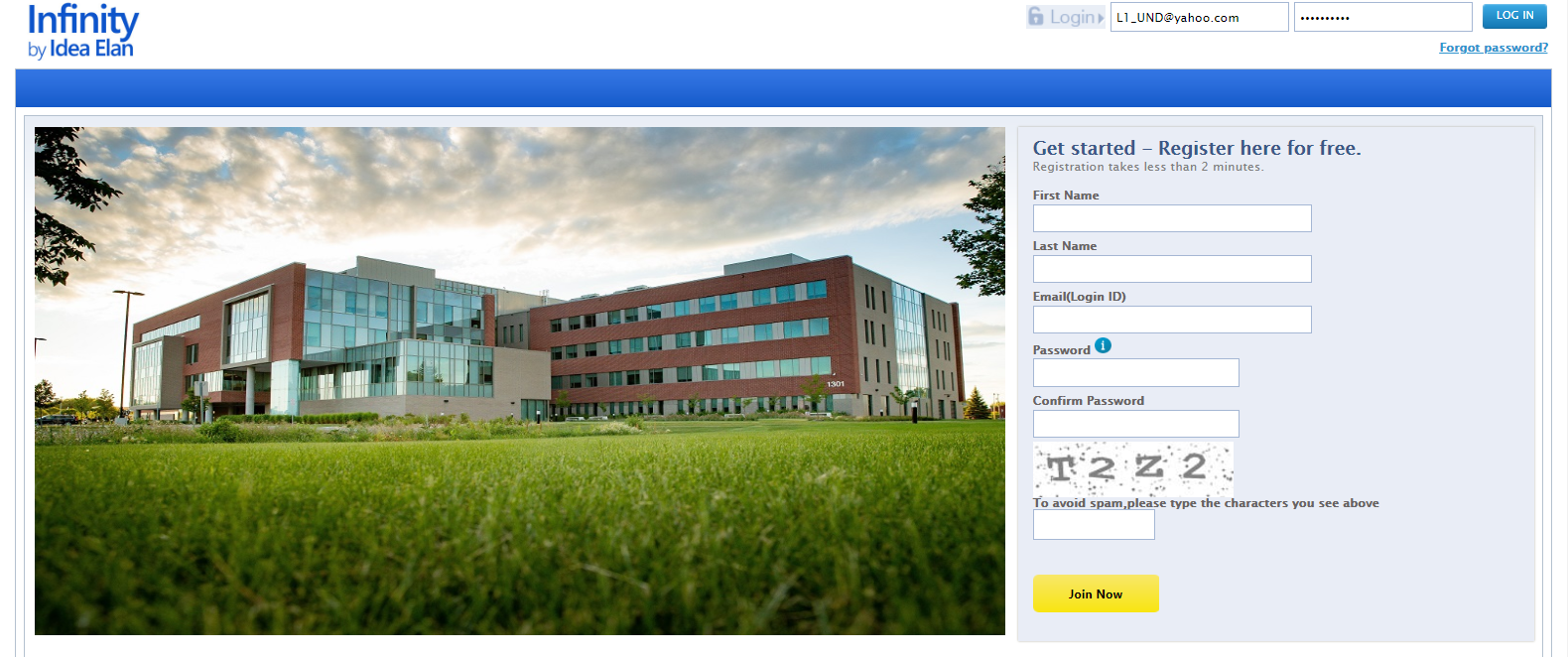
Quick Startup Guide for PI’s/ Lab Admin

# Logging In:

For Internal: Users/PIs will login using <https://secure7.ideaelan.com/UND_Test/Public/AppLogin.aspx>

**PI/Lab admin ID**: L1\_UND@yahoo.com

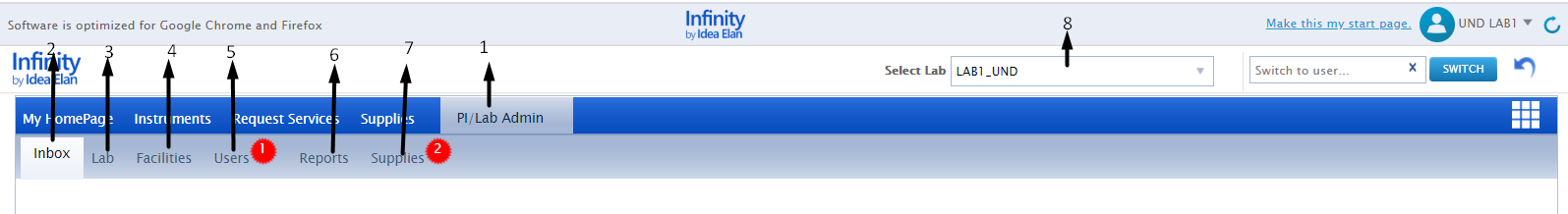
**Password**: @Test#1234



# The Lab Admin/PI:

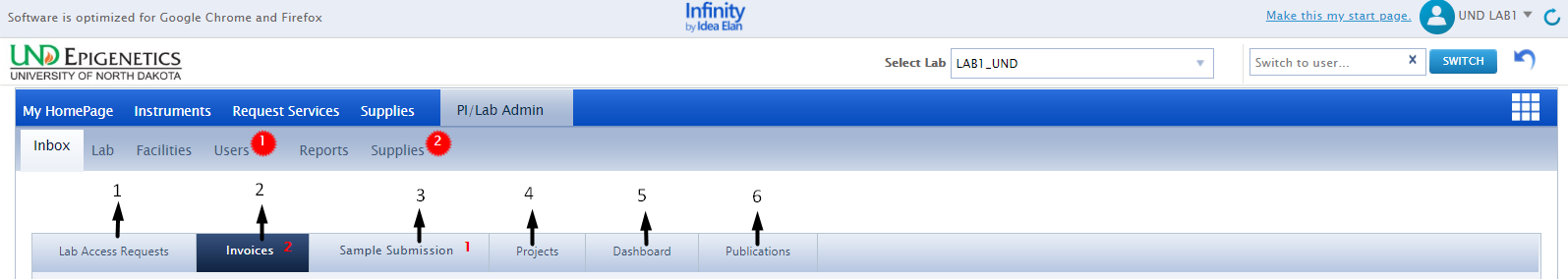
* Once logged in as a lab admin, a toolbar with tabs will appear that are specific to your role.

## 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.
8. Select Lab: Choose the lab you want to access from the drop down list.

## Lab admin🡺Inbox:

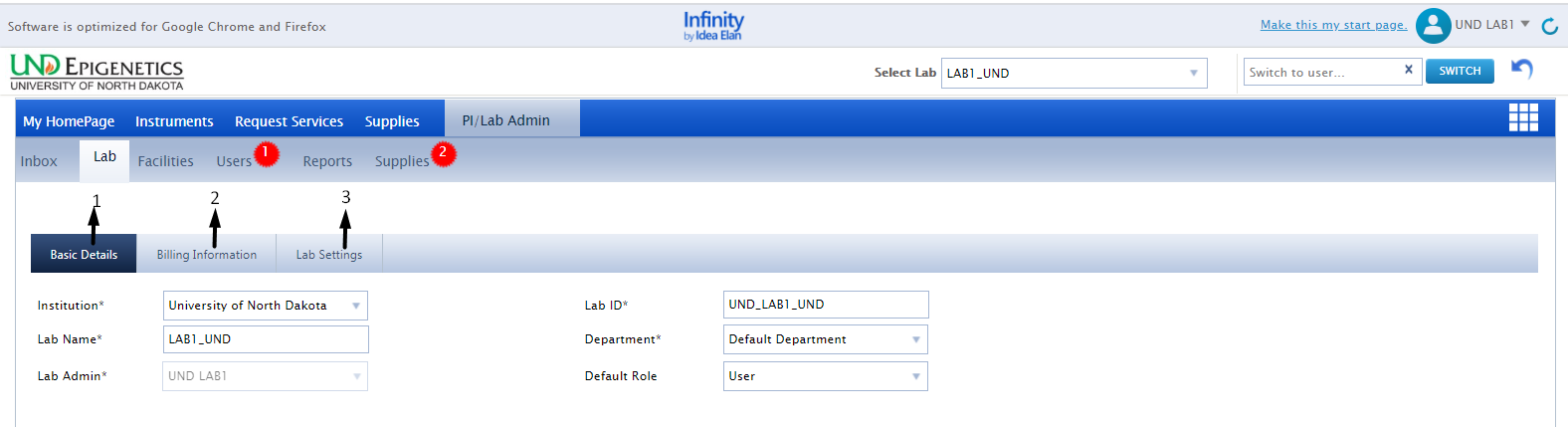


1. Lab Access Requests: To view, accept and reject user requests to the lab.
2. Invoices: To view, edit and accept invoices.
3. Sample Submission: To view sample submissions for the lab.
4. Projects: To view projects for the lab.
5. Dashboard: Displays the number of samples submitted, and the number of instrument reservations made.
6. Publications: PI’s/ Lab Admin should confirm that users have used a particular facility before the core can present their publications. Under Inbox🡺Publications, PI’s 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.”

## Lab admin🡺Lab:

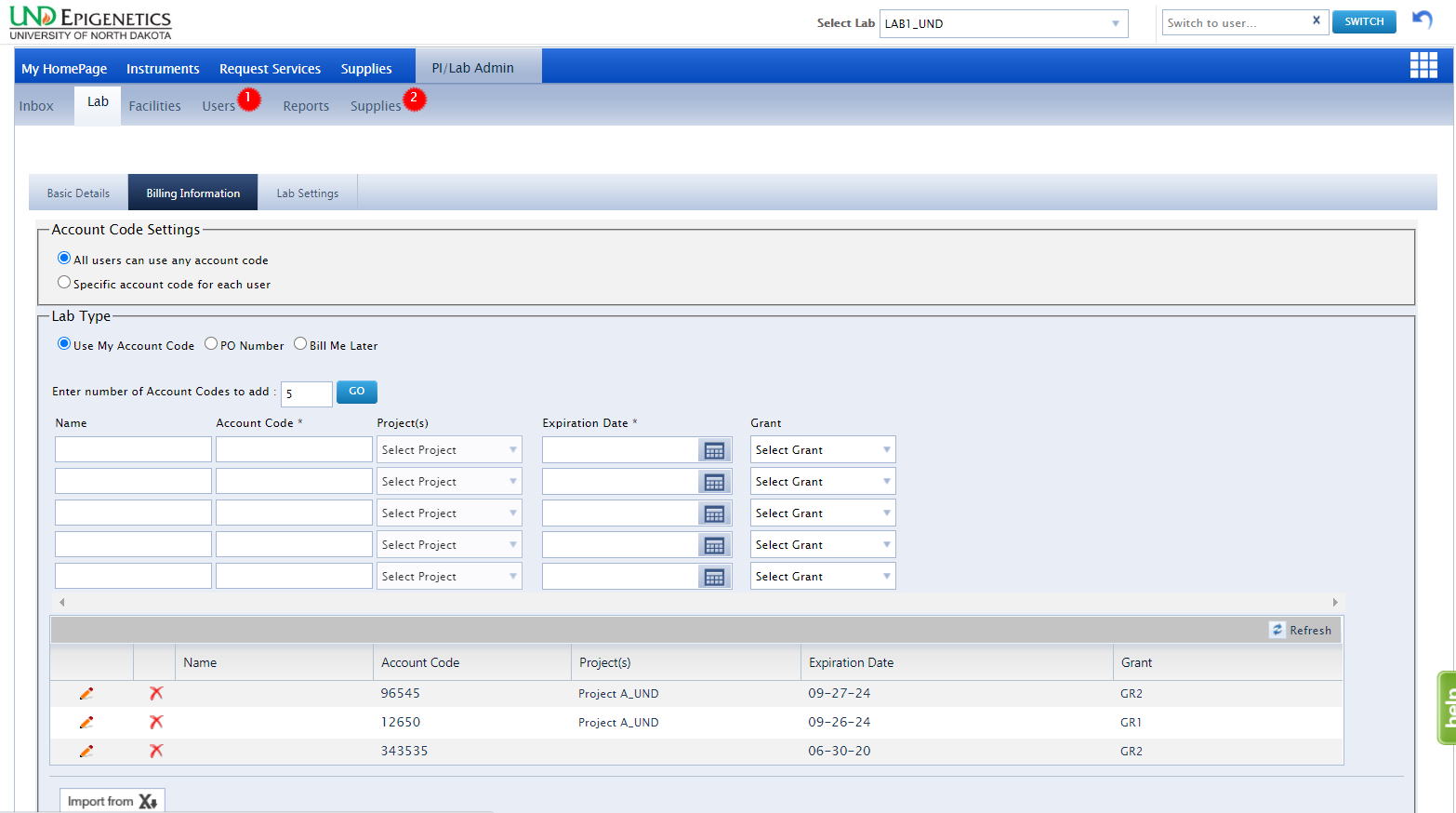
### Basic Details:

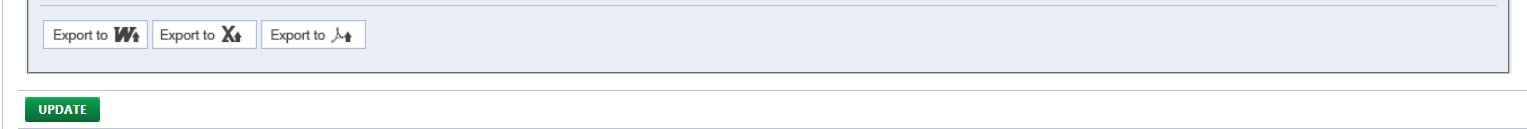
* Select to fill out lab information



### Billing Information:

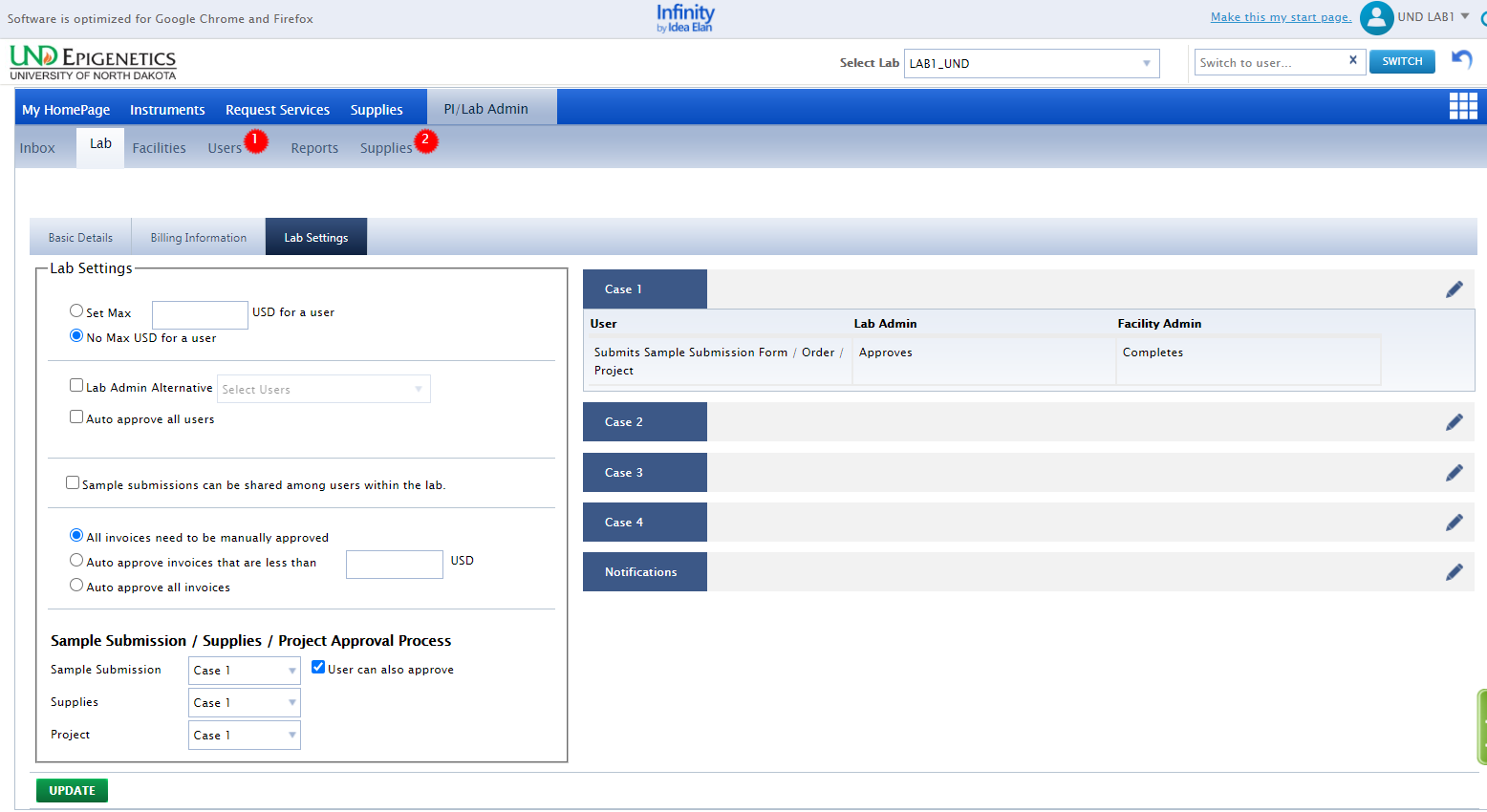
* Lab admin can select between the lab types such as “Use my Purpose code,” “PO Number,” or “Bill Me Later.”





### Lab Settings

* Click to select an alternative lab admin and set invoice approvals.
* 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, 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 and be set and applied.

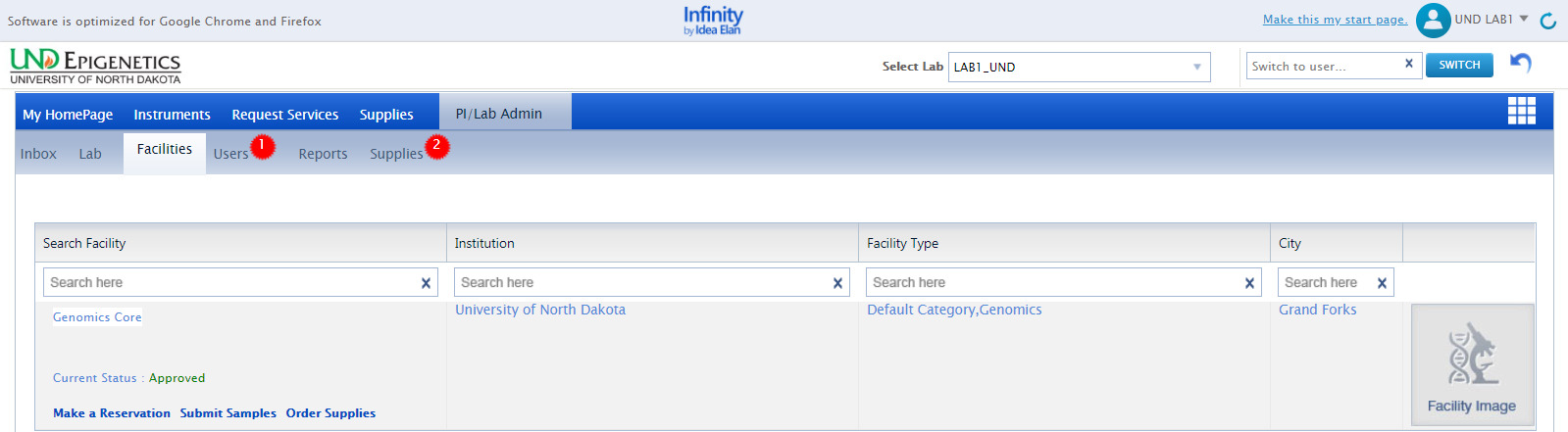


* Notifications: PI/Lab admin gets notifications.



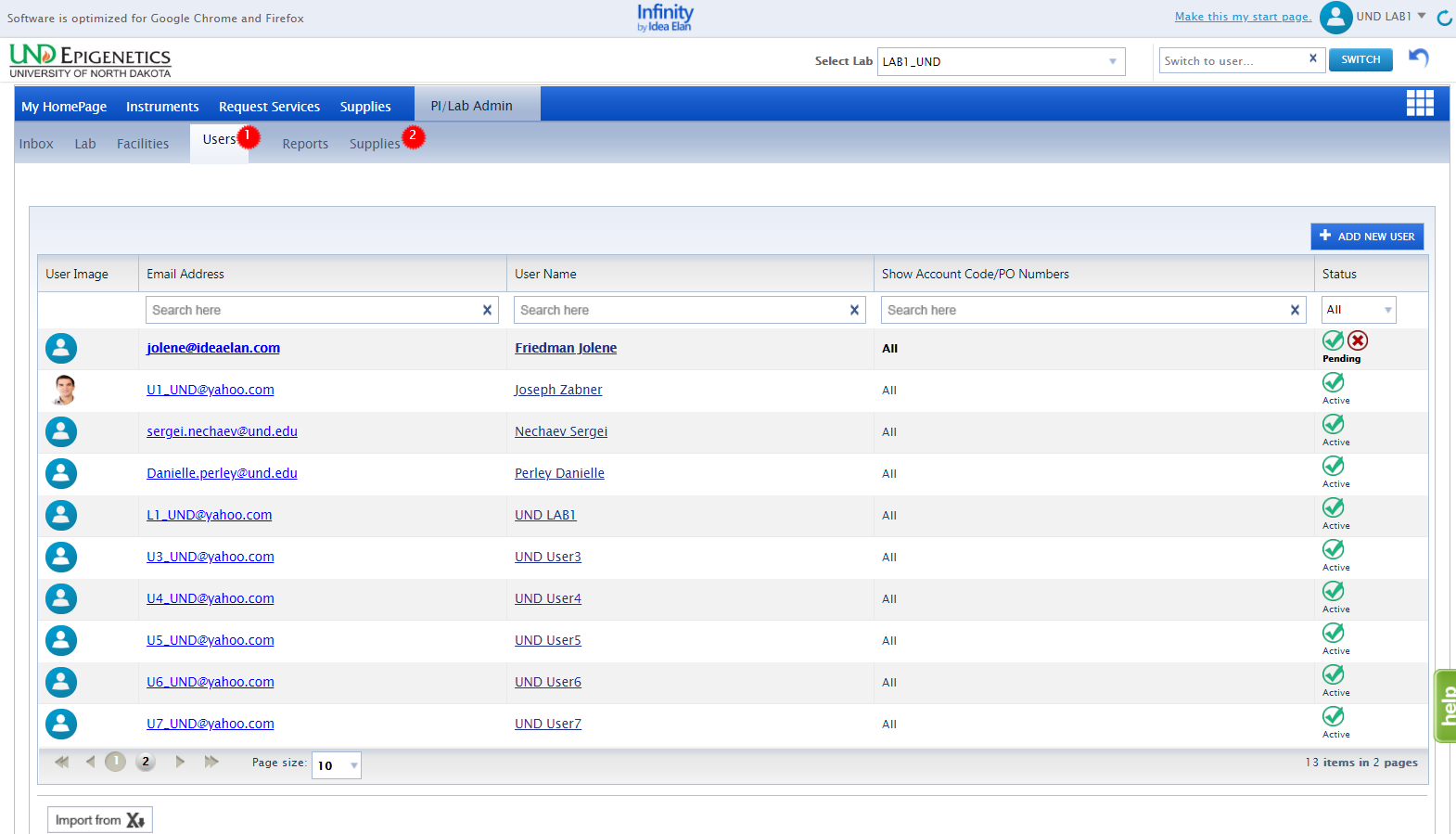
## Lab admin🡺Facilities:

* To view and request access to various facilities listed.



## Lab admin🡺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.



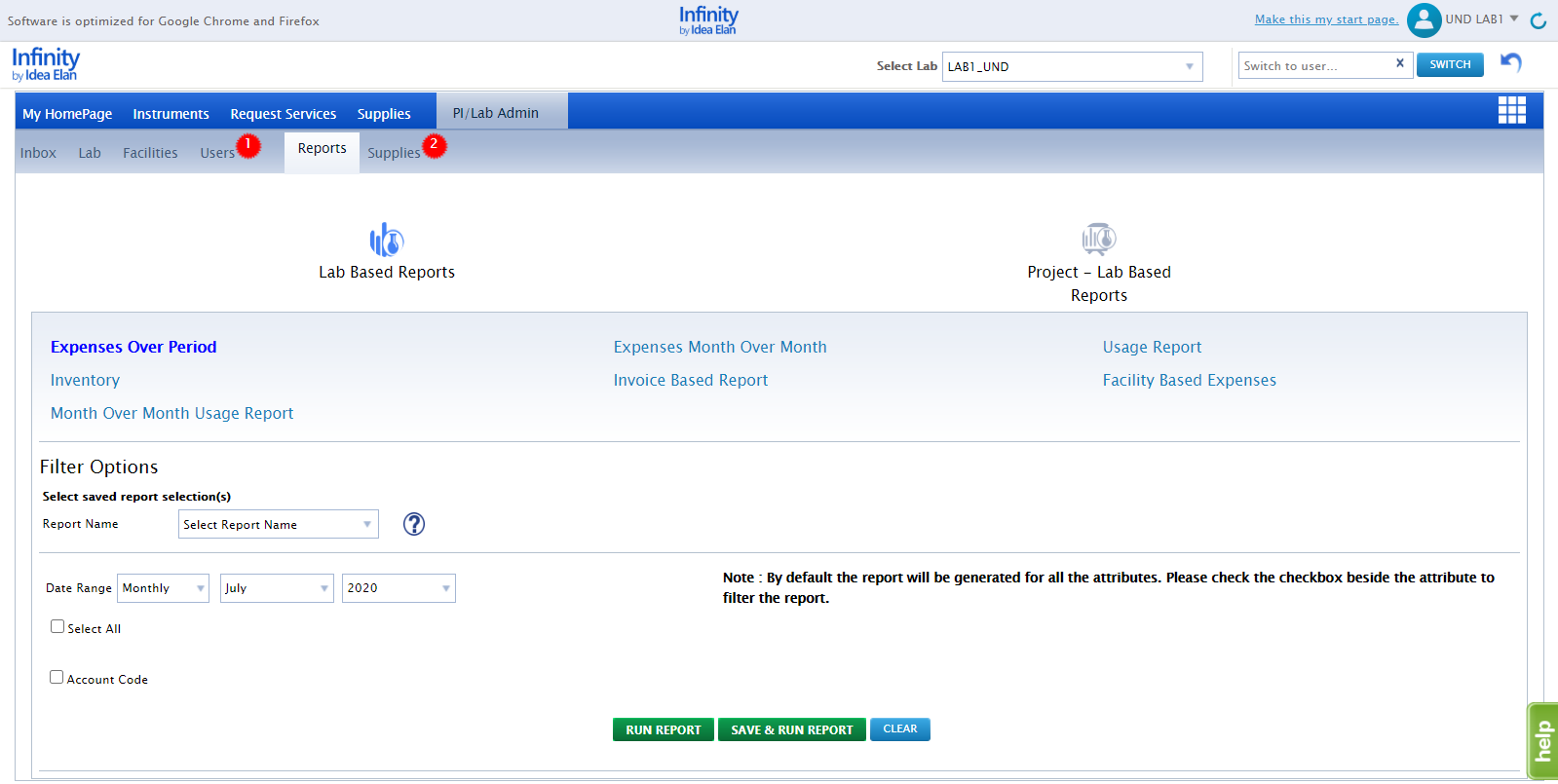


* The list of users can also be exported as word, excel or PDF document.

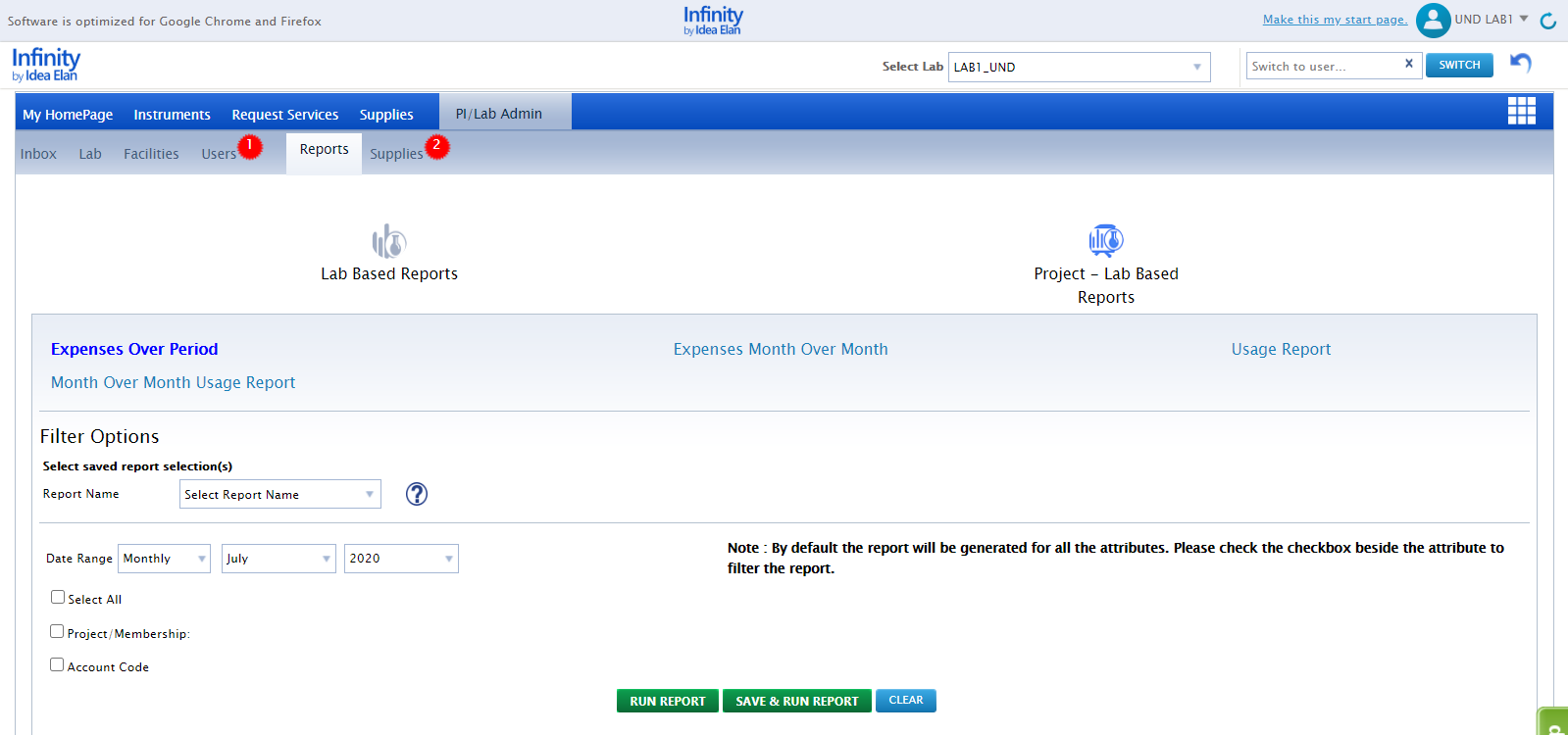
## Lab admin🡺Reports

* 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.
* 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.
* 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.

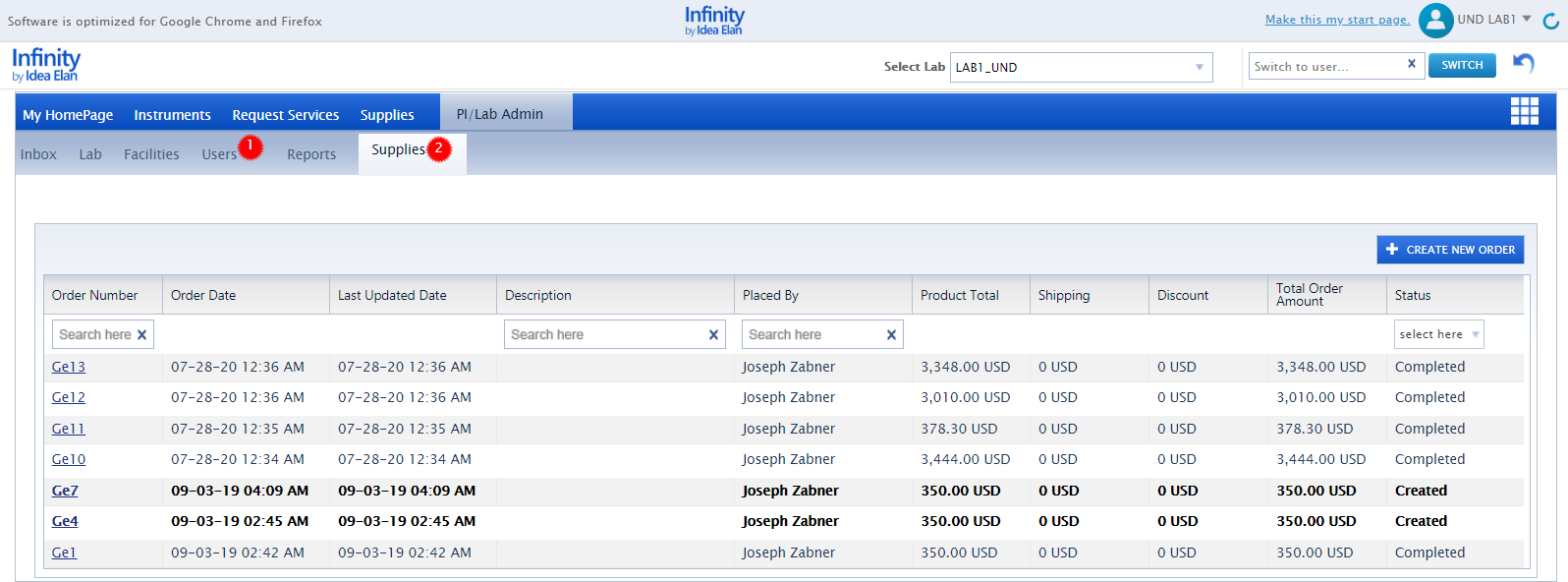
### Lab Based Reports



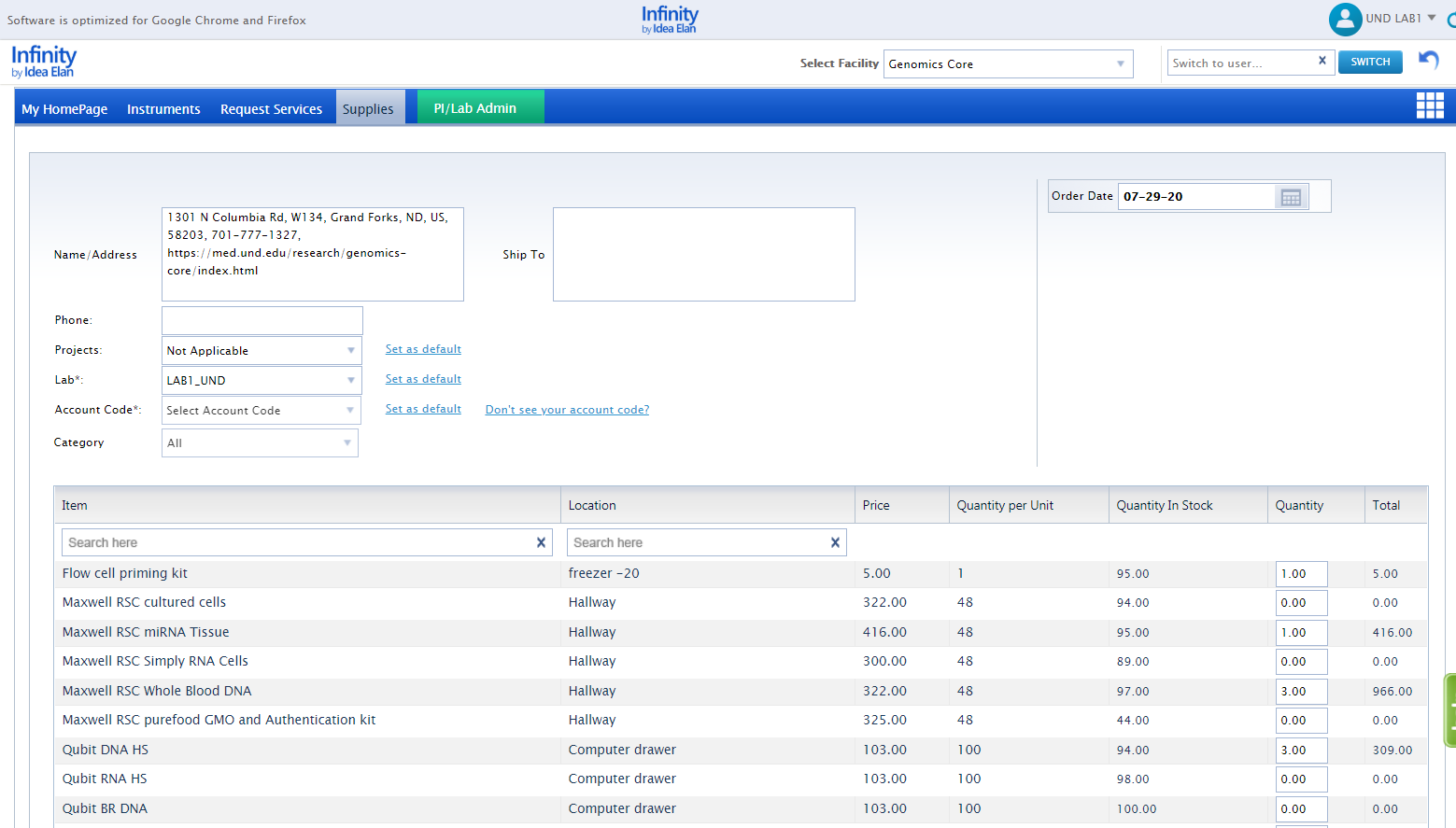
### Project – Lab Based Reports

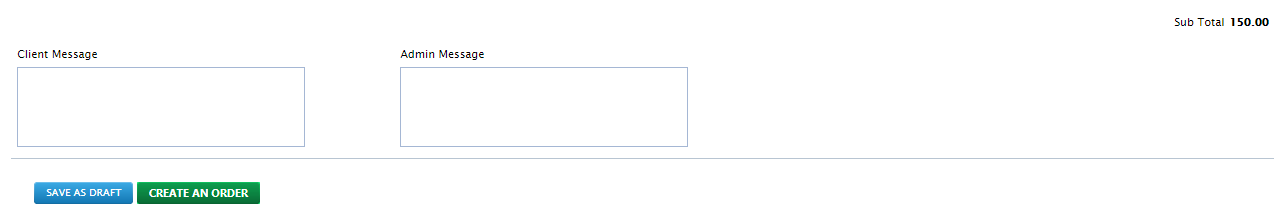


## Lab admin🡺Supplies



* 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.
* 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.





## Publications

* PI’s/ 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.”

