Research Platform Booking System
Quick Reference Guide

iLab

For Principal Investigators (UoM Themis account holder)
– Biological Optical Microscopy Platform (BOMP)

12 January 2022

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1. Register in iLab

Most University of Melbourne PIs will automatically have a lab group created for them in the iLab system **based on research project account codes**. For most PIs this should mean they can immediately go to the Sign-In process and access their account and lab group.
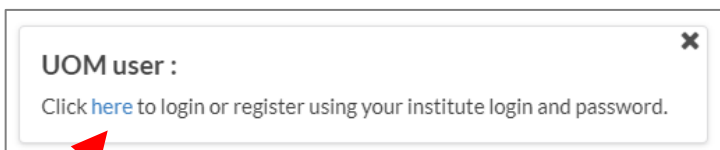
If you hold a UoM Themis account but don't have your own group in iLab yet, you can request support via University Service (Request link).
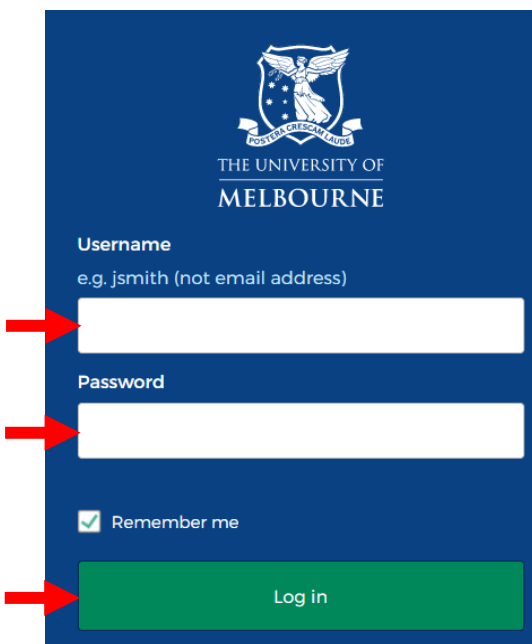
2. Sign-in to iLab

1. Go to The University of Melbourne iLab landing page

   https://unimelb.ilab.agilent.com/

2. Click on 'login' button on the top right of the page

3. Click 'here' to login
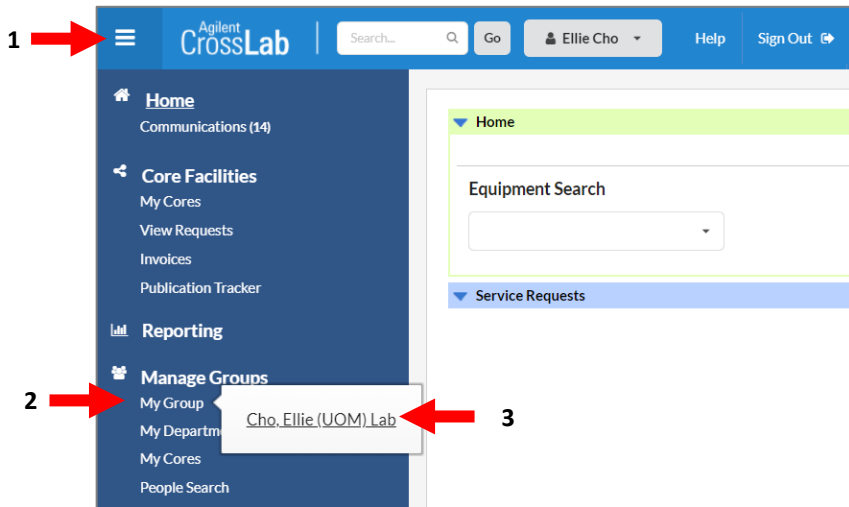

4. Use your UoM credentials to Log in.

   Note that multi-factor authentication (MFA) is also active so you may be prompted to also authenticate via Okta

   NOTE

   For any issue, you can request support via University Service (Request link).
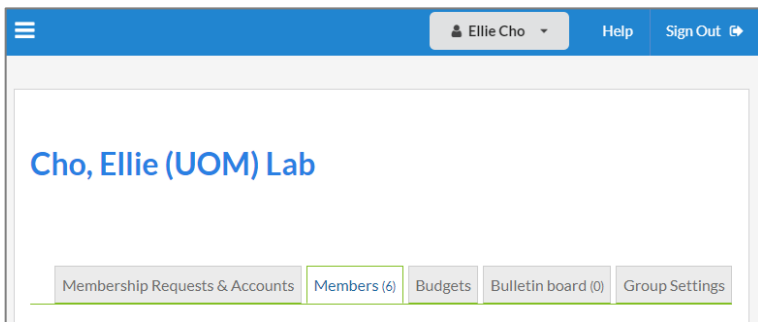
3. Manage Your Research Group in iLab

3.1 Access to My Group

To access your Lab Group interface,

1. Locate the left-side pop-out menu by clicking on the top-left 'hamburger icon'.

2. Hover over '**My Group**'
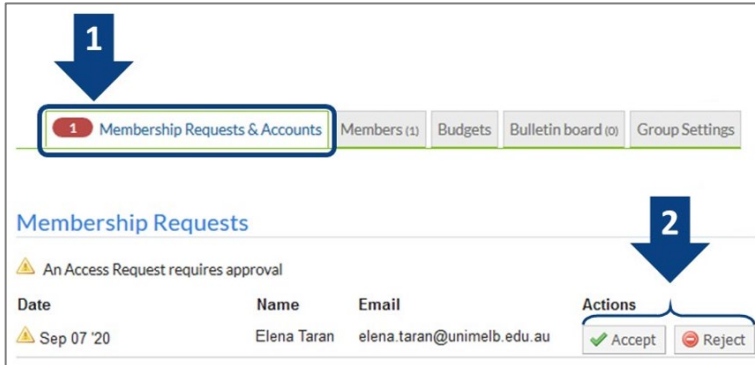
3. Click on your group name

4. You will now see your lab group interface which will allow you to manage your group in iLab.

3.2 Adding New Lab Members

There are two ways for new members to be added to your lab group: via a request from the user, or by linking existing users into your lab directly.

Option A. Approving lab group access requests from users:

1. Click on the '**Membership Requests & Accounts**' tab

2. Pending requests will appear under the Membership Requests section, to accept a member into your lab click the '**Accept**' button

Option B. Link existing users to your lab:
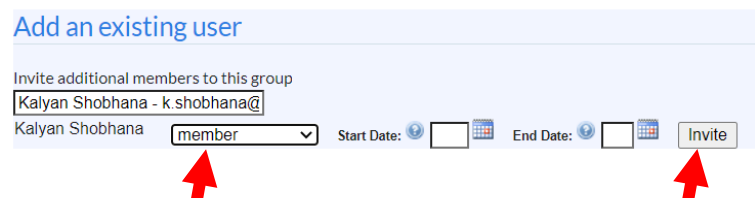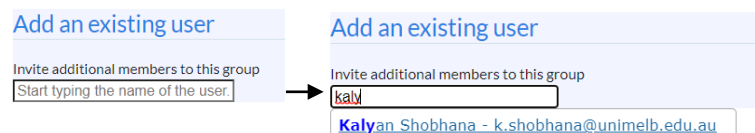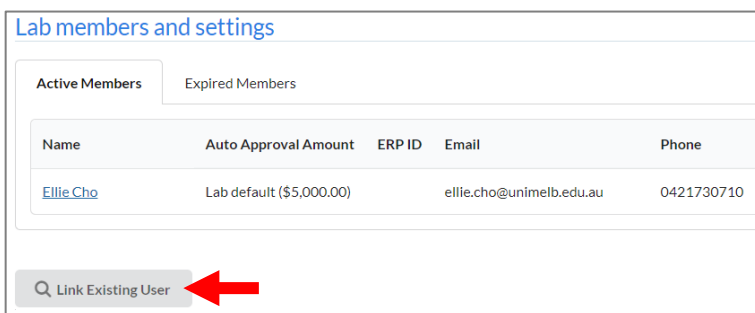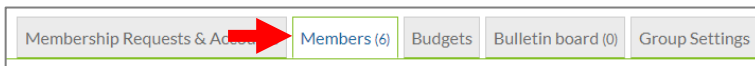
1. Click on the '**Members**' tab

2. Under the Lab members and settings section click on the '**Link Existing User**' button

3. Type the user's name into the search box. The system will automatically search for the user.

4. click on their name in the list that appears

5. Choose an appropriate role for the user: member, manager, or principal investigator.

   You may add start and end dates for the user. If empty, the user will be active immediately & indefinitely.

6. Click '**Invite**'. The user will now appear in your members list.

3.3 Assigning Themis Account Strings to Lab Members

Any lab member from a UoM Lab Group **must** have an active Themis account string assigned to them in order to access Research Platform resources and services.
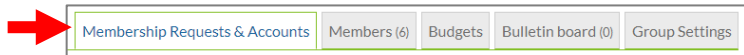
1. To assign Themis account strings to lab members, Click on the '**Membership Requests & Accounts**' tab.

2. In the 'Manage Accounts' section you will find the '**accounts**' table for your lab group.

   For UoM PIs, account strings are automatically updated nightly from Themis. If you don't see the account string, see 'Support' section for more detail.

   To make an account available for a member to use

3. Simply click the check box of the account in the row of the member you wish to assign it to. Users can have multiple accounts assigned to them for use.

   Account assignments are immediate, you do not need to 'save' them, recent changes are highlighted in green.

4. Set a default account that will automatically be selected when the user accesses a Research Platform by

   - Clicking the text in the Default Account column for the lab member.

   - You can then select a default account from the accounts that have been assigned.

3.4 Managing Lab Members (delegating responsibility)

You may wish to delegate responsibility to a lab member by assigning them as a Lab Manager, Financial Contact, Lab Primary Contact.

- **'Lab Manager':** will have similar rights to the PI role and can approve new members and manage existing members.

- **'Core Financial Contact':** will receive all iLab notifications for the Lab Group.

- **'Lab Primary Contact':** will receive charging detail as a form of iLab invoice quarterly during billing.
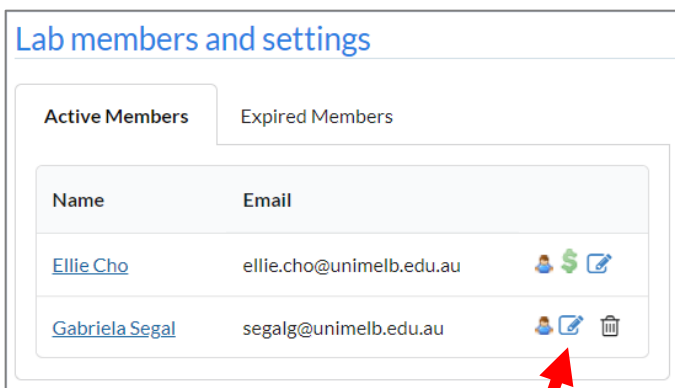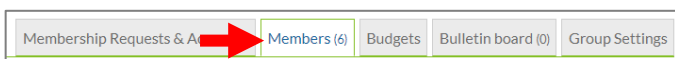
1. To set Lab Manager and/or Core Financial Contact, click on the '**Members**' tab

2. At the 'Lab members' section, find the lab member you wish to delegate responsibility to and click the '**blue pencil icon**' on the right.
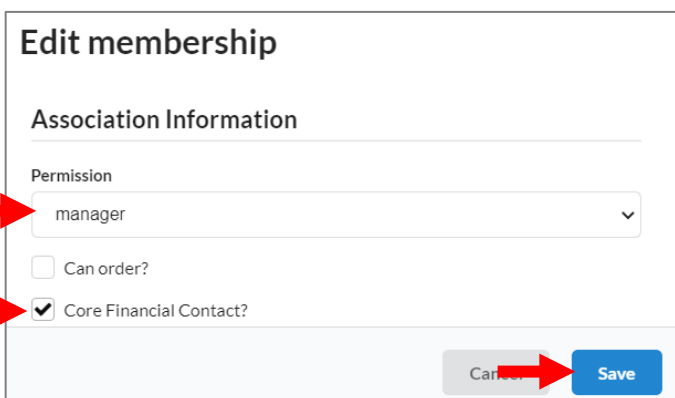
3. On the new window that appears set the Permission to '**manager**'.

4. If you wish to also delegate communication to this user, check the '**Core Financial Contact**' box.

5. Click '**Save**'
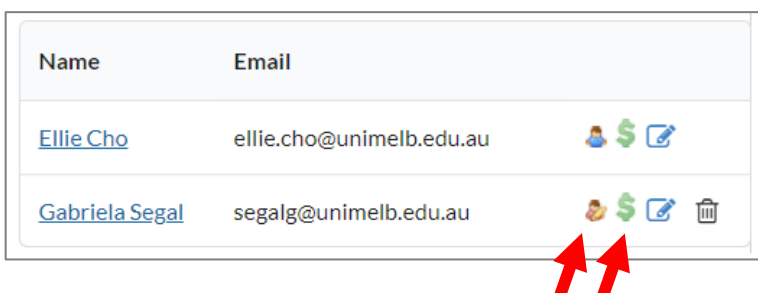
6. You will now see that the green '**$**' symbol is added for financial contact and that their role icon has changed from blue to yellow for lab manager.
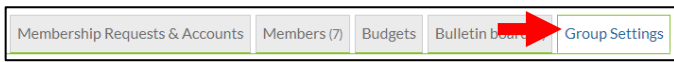
1. To change 'Lab Primary Contact', click on the '**Group Settings'** tab
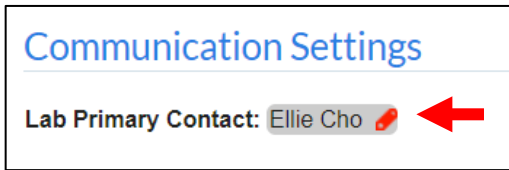
2. At the 'Communication Settings' section, click on your name and find the lab member you wish to delegate responsibility to.
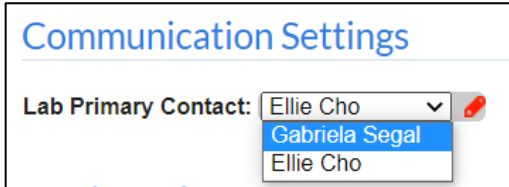
   Note : The member should be already assigned as 'Core Financial Contact'. Refresh browser if the member does not appear on the list.

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4. Support

- **For UoM SSO login issues**

- **For Creating a new Lab Group for a PI**

- **For support with financial payment information**

- All account strings from agreement records (stored in Themis Agreements), where you have been assigned as the Primary Contact will automatically be added to your Lab Group in iLab. Exceptions to this include account strings from:
    1. Agreements where you are the Lead CI but someone else has been assigned as the Primary Contact. In this case, the account string will appear in the Primary Contact's Lab Group instead.
    2. Agreements that have not come across because of incorrect/missing data in the source system (i.e. Themis Agreements). For example, the agreement has no budget, is assigned to multiple Primary Contacts, is assigned to an excluded Owning Department or status, etc.

- It is possible to include account strings in iLab that are not linked to Themis agreement records and therefore are not coming across from the automated feed. This may be required for:
    1. Research agreements where a budget has not been entered in Themis Agreements (e.g. internal research grants)
    2. More complex research agreements that use more than one Cost Centre/Local Purpose Code, which is not always recorded in Themis Agreements
    3. Account strings using generic GL project codes that are not assigned to a specific research agreement. For example, project codes such as Operating (000000), Research Projects < $20,000 (000095) and Chancellery Strategic Projects (000300 - 000600)

- If you require an account string that has not been assigned to your Lab Group, then you will need to complete the **iLab Support Request Form** and select 'Adding an account string to a Lab Group'. When submitting your request, you do not need to know the reason for why the account string is not coming through. This will be part of the investigation process completed by the Research Domain Systems support team.

- It's important to note that all new account strings that have come across to your Lab Group via the automated feed are not automatically assigned to Lab Members. It is the PI's responsibility to ensure the relevant account string(s) are linked to each lab member. Please follow the instructions 3.4. Assigning Themis Account Strings to Lab Members. of this document.

Contact BOMP staff via bomp-enquiries@unimelb.edu.au

- **For any resource, service or platform-specific support**

More detail contact information can be found on the 'About Our Core' tab