



Idea Elan



uOttawa

Idea Elan

INFINITY

Comprehensive Online Solution for Lab and Core
Facility Management

Principal Investigator Guide
CBIA core

CONTENTS

LOGIN INSTRUCTIONS..... 3

INTERNAL USERS- (WITH @UOTTAWA.CA EMAIL).....3

EXTERNAL USERS (OHRI, CHEO, CARLETON, UOHI ...)3

LAB TAB..... 4

BASIC DETAILS.....4

BILLING INFORMATION.....4

LAB SETTINGS4

INVOICING..... 5

FAQS 6

A. *How to add a new student to my lab?*6

B. *How to delete a user in my Lab?*.....6

C. *How to add a Lab manager?*.....7

D. *How can I request access to another Facility?*7

TRAINING RECORD FROM IDEA ELAN (NOVEMBER 2020)..... 8

Login Instructions

Internal Users- (with @uottawa.ca email)

Users with University of uOttawa login ID can use their credentials to log in and will be redirected to Infinity.

Internal User Login URL: <https://secure17.ideaelan.com/secure/Public/AppLogin.aspx>



SEND A PASSWORD REQUEST!
If you are unable to reset your password, [send us a request](#) and the Service Desk will contact you as soon as possible.
Once you have your password, [set up your recovery email](#) so you can easily recover your password in the future.

username@uOttawa.ca
Password

[Forgot your password?](#)

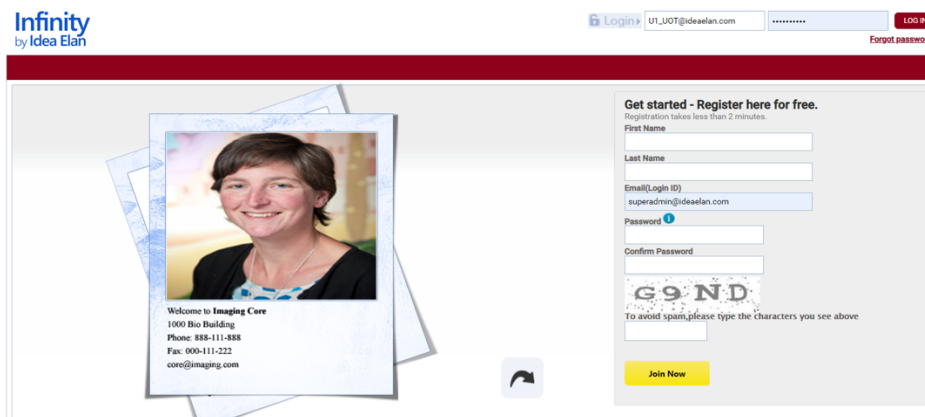
Login

This page displays in the default language of your browser and device. To see this page in another language, [change your language settings](#).

External Users (OHRI, CHEO, Carleton, UOHI ...)

External users will use the Infinity start page. Existing users can enter their information in the top right corner for username and password. New users will have to register below under: "Get started, register here for free."

External Users Login URL: <https://secure17.ideaelan.com/uOttawa/Public/AppLogin.aspx>



Infinity
by Idea Elan

Login U1_UOT@ideaelan.com LOG IN
[Forgot password?](#)

Get started - Register here for free.
Registration takes less than 2 minutes.

First Name
Last Name
Email(Login ID)
superadmin@ideaelan.com
Password
Confirm Password

GOND
To avoid spam, please type the characters you see above

Join Now

Welcome to Imaging Core
1000 Bio Building
Phone: 888-111-888
Fax: 000-111-222
core@imaging.com

Your lab should already be created. If it is not the case, contact cbiacore@uottawa.ca and we will create it for you.

LAB Tab

Basic Details

Under Pi/Lab Admin > LAB > Basic Details

You can check your lab information, the students listed in your lab.

Billing Information

Under Pi/Lab Admin > LAB > Billing Information

Here you can check and edit the account codes associated to your lab.

Lab Settings

Under Pi/Lab Admin > LAB > Lab Settings

There are a lot of settings you can define for your lab.

- ◇ You can mention the max your student/staff is allowed to spend
- ◇ You can set the name of your lab manager, so he can receive and approve the invoice for you. You can Auto approve any student who will request access to your lab.
- ◇ You can build your personal conditions for sample submission, supplies or Project, by selecting the case that describes the best what you want. Cases are described on the right (**cannot** be edited)

The screenshot shows the 'Lab Settings' page. At the top, there is a navigation bar with 'Inbox', 'Lab', 'Facilities', 'Users', 'Reports', and 'Supplies'. Below this, there are tabs for 'Basic Details', 'Billing Information', and 'Lab Settings'. The 'Lab Settings' section is divided into two main areas:

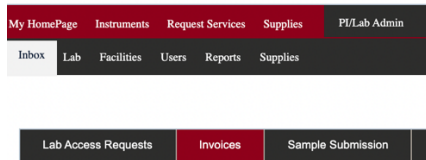
- Lab Settings (Left Sidebar):**
 - Radio buttons for 'Set Max [input] CAD for a user' and 'No Max CAD for a user' (selected).
 - Checkbox for 'Lab Admin Alternative' with a dropdown menu 'Select Users'.
 - Checked checkbox for 'Auto approve all users'.
 - Checkbox for 'Sample submissions can be shared among users within the lab.' (unchecked).
 - Radio buttons for 'All invoices need to be manually approved' (selected), 'Auto approve invoices that are less than [input] CAD', and 'Auto approve all invoices'.
 - Sample Submission / Supplies / Project Approval Process:**
 - Sample Submission: Case 1 (dropdown), with checkbox 'User can also approve' (unchecked).
 - Supplies: Case 2 (dropdown).
 - Project: Case 2 (dropdown).
- Case Definitions (Main Content Area):**
 - Case 1:** User: Lab Admin (Submits Sample Submission Form / Order / Project), Facility Admin (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 CAD Limit set for user then approve the quote, If Quote / Order amount > Max CAD Limit then Lab Admin needs to approve, Completes).
 - Case 4:** User: User Type (Submits Sample Submission Form / Order / Project, External: Case 1 (dropdown), Internal: Case 1 (dropdown)).

You can also set when you and your lab manager need to be notified. On the left, below the cases, expand “ Notifications”.

<input type="checkbox"/>	Notification Message
<input type="checkbox"/>	User submits sample submission form that is auto approved based on Lab settings ?
<input type="checkbox"/>	Facility Admin submits quote for a Sample submission ?
<input type="checkbox"/>	Facility Admin submits quote for a Sample submission is Auto approved based on lab settings ?
<input type="checkbox"/>	Lab admin denies a Quote ?
<input type="checkbox"/>	Lab admin change the status to Quote Review ?
<input type="checkbox"/>	Labadmin/User Approves a Quote ?
<input type="checkbox"/>	Facility admin changed the sample submissions status to "InProgress" ?
<input type="checkbox"/>	Facility admin changes the sample submissions status to Complete & Ready to billed ?
<input type="checkbox"/>	Cancelling the Sample Request ?
<input type="checkbox"/>	Institution admin Reopens the sample form ?
<input type="checkbox"/>	Admin changes the status of individual records as reviewed/accepted/inreview ?
<input type="checkbox"/>	Dispatched Invoice to lab admin ?
<input type="checkbox"/>	Invoice approved directly based on lab settings ?
<input type="checkbox"/>	Lab admin has approved a supply order request ?
<input type="checkbox"/>	Facility admin approves or rejects a Facility access request ?

Invoicing

In order to check and approve auto-generated invoices go to Pi/Lab Admin > Inbox > Invoices



FAQs

A. How to add a new student to my lab?

Login to Infinity webpage

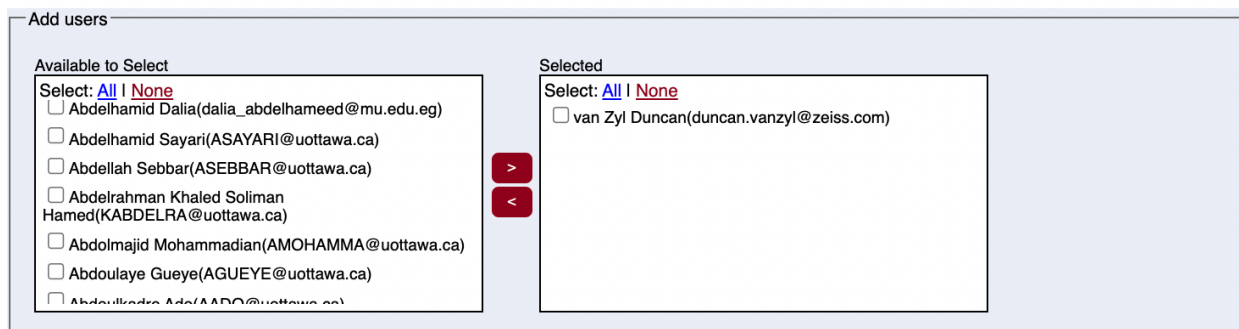
Case 1: A new student request access to your lab

To grant access to this new user, go to PI/Lab Admin > Inbox > Lab Access Request

Case 2: The user exists already in the system.

Go to PI/Lab Admin > Lab > Basic Details > Add Users

Look for the user name and “move it” to the “Selected” window using the “>” icon.



The screenshot shows the 'Add users' interface. It is divided into two main sections: 'Available to Select' and 'Selected'. Both sections have a 'Select: All | None' dropdown. The 'Available to Select' section contains a list of users with checkboxes and a '>' button. The 'Selected' section contains a list of users with checkboxes and a '<' button. The users listed in 'Available to Select' are: Abdelhamid Dalia (dalia_abdelhameed@mu.edu.eg), Abdelhamid Sayari (ASAYARI@uottawa.ca), Abdellah Sebbar (ASEBBAR@uottawa.ca), Abdelrahman Khaled Soliman Hamed (KABDELRA@uottawa.ca), Abdolmajid Mohammadian (AMOHAMMA@uottawa.ca), Abdoulaye Gueye (AGUEYE@uottawa.ca), and Abdoulaye Gueye (AGUEYE@uottawa.ca). The user listed in 'Selected' is: van Zyl Duncan (duncan.vanzyl@zeiss.com).

Case 3: The user is completely new

Go to PI/Lab Admin -> Users -> Add new user. Fill the form



The screenshot shows the PI/Lab Admin interface. The top navigation bar includes 'My HomePage', 'Instruments', 'Request Services', 'Supplies', and 'PI/Lab Admin'. Below this, there is a sub-navigation bar with 'Inbox', 'Lab', 'Facilities', 'Users', 'Reports', and 'Supplies'. The 'Users' tab is selected. In the bottom right corner, there is a blue button labeled '+ ADD NEW USER' with an arrow pointing to it.

Import from 

Or use the Import from Excel

TIP: Using this Import from excel function, you can add more than one user at once!

B. How to delete a user in my Lab?

Go to PI/Lab Admin > Lab > Basic Details > Add Users

In the window “ Selected”, select the name of the user to remove from your lab. “Move it” to the “Available to select” window using the “<” icon.

Note: A user **cannot** be deleted, only inactivated if necessary: Go to PI/Lab Admin > Users

C. How to add a Lab manager?

Under PIs Tab > Lab > Lab Settings

Choose someone from the lab as a Lab Admin Alternative

The screenshot shows the 'Lab Settings' configuration page. It includes options for CAD (Set Max, No Max CAD for a user), Lab Admin Alternative (with a dropdown menu highlighted by a red arrow), Auto approve all users (checked), and Sample Submission / Supplies / Project Approval Process (with dropdowns for Case 1, Case 2, and Case 2).

D. How can I request access to another Facility?

- Go to Under **Pi/Lab Admin > Facilities**
- All facilities within the institution will be listed.

If you do not find a facility you can also try to hover over the 9 square-box and click on the blue DNA icon.



- Click on “Request Access” to request access to the facility you want to use. Depending on the facility settings, a manual approval may be necessary.

Search Facility	Institution	Facility Type	City
cbia	Search here	Search here	Search here
Cell Biology and Image Acquisition (CBIA) Core Fac.	University of Ottawa	Default Category:Incubate,Inverted,Microscopy,Stereoscope,Uprig ht	Ottawa

Facility Access Request form

If you are starting a new project that requires microscopy-based experiments

Contact CBIA Core Facility

If you request access to the facility to be trained on one of our microscope please fill the training form: [training form](#)

If you encounter any issue email cbia-core@uottawa.ca cbia-core.uottawa.ca

Submitted Facility Access Request cannot be modified.

REQUEST ACCESS **CLOSE**

Search Facility	Institution	Facility Type	City
cbia	Search here	Search here	Search here
Cell Biology and Image Acquisition (CBIA) Core Fac.	University of Ottawa	Default Category:Incubate,Inverted,Microscopy,Stereoscope,Uprig ht	Ottawa

Current Status: **Waiting for approval**

- The facility manager will be notified and grant you access.

Training Record from Idea Elan (November 2020)

Principal Investigator training:

[https://us02web.zoom.us/rec/share/PkExltzleC-](https://us02web.zoom.us/rec/share/PkExltzleC-k8SBobH9TjxqMotLx8x8EwTaQ_216JeyjmY2iWkhVRkbElqXwuQkX.9MaggfjQCGFDypkR)

[k8SBobH9TjxqMotLx8x8EwTaQ_216JeyjmY2iWkhVRkbElqXwuQkX.9MaggfjQCGFDypkR](https://us02web.zoom.us/rec/share/PkExltzleC-k8SBobH9TjxqMotLx8x8EwTaQ_216JeyjmY2iWkhVRkbElqXwuQkX.9MaggfjQCGFDypkR)

Passcode: ?L7R2q+Q

Or

[https://us02web.zoom.us/rec/share/Y-aYqwEHvCqqE-59sFCXPN-](https://us02web.zoom.us/rec/share/Y-aYqwEHvCqqE-59sFCXPN-gtbEQOFcyBMLRl2ngH_ofLmuRYVzp2QEID2juFEzf.xzdrGrRPhTDz6n9I)

[gtbEQOFcyBMLRl2ngH_ofLmuRYVzp2QEID2juFEzf.xzdrGrRPhTDz6n9I](https://us02web.zoom.us/rec/share/Y-aYqwEHvCqqE-59sFCXPN-gtbEQOFcyBMLRl2ngH_ofLmuRYVzp2QEID2juFEzf.xzdrGrRPhTDz6n9I)

Passcode: =+3#6lqf