

Equipment Booking Software – ilab Solutions

1. Introduction

iLab Solutions is a cloud-based, licenced and specialist software purchased by Faculty of Science to support the booking and utilisation of equipment used to support research and teaching, both within and outside the University.

The users of this software include Departmental Equipment Technicians, Equipment Centre Managers, Fund Owners (PI's), and students associated with research programmes and teams. The software will also be used by external parties, such as other tertiary institutions and commercial entities, who both wish to take advantage of Science's equipment for their own research or teaching purposes.

2. Software Ownership

iLab Solutions software is governed at Faculty Office level via a new organisational model called Auckland Science Analytical Services (ASAS). This organisation function is led by Peter Cattin, ASAS Operations Manager.

ASAS has responsibility for the strategic operation and promotion of analytical facilities within the Faculty of Science to help ensure key technical platforms are available to support the pursuit of research and teaching.

The owner of the software licences is Science's Director of Finance (David Jordan).

3. Application Technical Information

As this is a cloud-based solution, please refer to the vendor's web site for more details -

<http://www.ilabsolutions.com/>

There are two extracts that operate between iLab Solutions and UoA:

- a. Nightly outbound extract of active funds (projects) from PeopleSoft to iLab which allow for end users of the software to book equipment and for the associated costs to be charged to.
- b. Nightly inbound extract from iLab to PeopleSoft which provides journal information to internally charge Departments and funds for the actual usage of equipment.

The technical details of each extract are outlined in Section 6.

All users of iLab Solutions software log onto the software using UoA authentication (SSO) based on UPI. For external institutions, they are registered via the Tuakiri federated model, while non-federated entities are required to register.

Develop a web site to promote and inform customers about Science equipment and service capabilities, including access to iLab software.

4. Audience

The user base for this software is:

- internal UoA staff and students within the SBS Department (associated with the CGPM,
- external Universities including UniServices (that are federated via Tuakiri programme)
- any other approved or registered commercial entity.

The intention is to roll out iLab software to the Chemistry Dept in the first quarter of 2015 and then further roll-outs across Faculty of Science over the remainder of that year.

5. IT Deliverables

The application is divided into four main components:

- iLab Software (Base Functionality)
- Financial Integration
- Identity Management
- ASAS Web Site

5.1 iLab Software (Base Functionality)

- All Centres have the ability to view availability, quote and book for the usage of the equipment. Each Centre has access to manage/administer the usage and operation of their equipment.
- A series of standard reports are available to identify equipment availability, utilisation (i.e. who has consumed services or equipment, etc) and financial information.
- All users in iLab are assigned to a standard iLab role which will ensure that each user has the appropriate authority and access required to perform their role.
- iLab has functionality to monitor progress on booking requests and the request fulfilment.
- The base software captures information relevant to each Centre/Equipment item including key contact information, equipment usage details, pricing information.
- iLab contains a pricing list based on the end user affiliation, so there are internal prices and external prices.

5.2 Financial Integration

- Fund and PI information is passed electronically from UoA PeopleSoft to iLab via an automated upload. The frequency is to be nightly (excluding weekends).
- Fund types in iLab include:
 - Research Office projects

- UniServices grants
- PReSS accounts
- Departmental funds e.g. Jam Jars (SBS)
- Research Enhancement grants

5.3 Identity Management and Other Integration

- The booking software integrates with the UoA domain (via UPI's). Non-UoA users of Science equipment will be required to register with UoA via the Tuakiri federated model.
- Data is secure and is backed up daily by the iLab vendor. The system is available 24x7 (with the exception of planned and agreed outages (e.g. maintenance tasks)).
- The licences for iLab software are managed and administered by IT Procurement and Faculty of Science (Finance Director).

5.4 ASAS Web Site

- Web site established to describe and promote the ASAS model and the equipment, services and resources available to be consumed. The site will include details about requesting access to iLab.

<https://www.sciencestaff.auckland.ac.nz/en/about/faculty-services/analytical-services.html>

6. Faculty Process Changes

The following are perceived impacts to Science as a result of this project:

What Changes ?	Why ?
1. Change to how new funds (projects) are created in PeopleSoft by mandating specific fields to be maintained.	To ensure these mandatory fields can be made available in iLab software, where they are key fields in iLab.
2. PReSS accounts will need to be approved by PI's instead of those that own the funds (i.e. typically students).	To ensure these types of funds can flow through to iLab software, so that they can be available to use.
3. Users that are defined as a high priority will have rights to book and use the equipment over other user types.	To ensure that high-value users are able to book and use equipment.
4. Charging for equipment usage will be based on actual usage and not what was quoted to an end user.	To ensure UoA provides high-value customers with opportunity to utilise UoA equipment. Improves revenue opportunities.
5. Electronic approvals of charges resulting from equipment usage.	To ensure there is sufficient visibility of charges prior to posting to UoA financial system.

7. In-Bound and Outbound Extracts

The following are details of the two extracts between iLab and UoA's PeopleSoft Financial system.

Type	Source	Target	Frequency	File Format	File Naming Convention	Any additional requirements
PI	PS Finance	iLab	Nightly	csv	File name of PS Finance server : UOA_ILAB_PROJECTS-nnnnnnn.csv *nnnnnnn is auto generated process instance number.	<ul style="list-style-type: none"> PS Finance Query UOA_ILAB_PROJECTS should be scheduled to run every night at 8:30pm PS Finance process should put the file in Q:\ilab\output\ folder MFT should transfer this file to iLabs as the file becomes available Before transfer rename the file to YYYYMMDD_pi_grants.csv before transferring it to iLabs After successful transfer copy the file into Archive folder - Q:\ilab\output\archive iLabs will process the file at 2:30am If PI file isn't available to iLab at the specified time, iLab will send a warning email notification to finance-fis@auckland.ac.nz
Journal	iLab	PS Finance	Nightly	csv	YYYYMMDD_ilab_GL_Journal.csv	<ul style="list-style-type: none"> MFT will fetch this file from iLabs server at 5:30am MFT will rename the file to ilab_GL_Journal.csv before copying it to PS Finance server (Q drive) MFT should copy the file into Q:\ilab\input\ folder PS Finance import process to run at 6am After completing the successful processing of File, import process will move the file into archive folder - Q:\ilab\input\archive

8. IT Support Model

The following outlines how support will be provided for iLab users:

- Business Owner = David Jordan, Finance Director, Faculty of Science
- Technical Owner = Andrew Cranna-Powell, Science IS Manager
- Operational Owner = Peter Cattin, ASAS Operations Manager, Faculty of Science

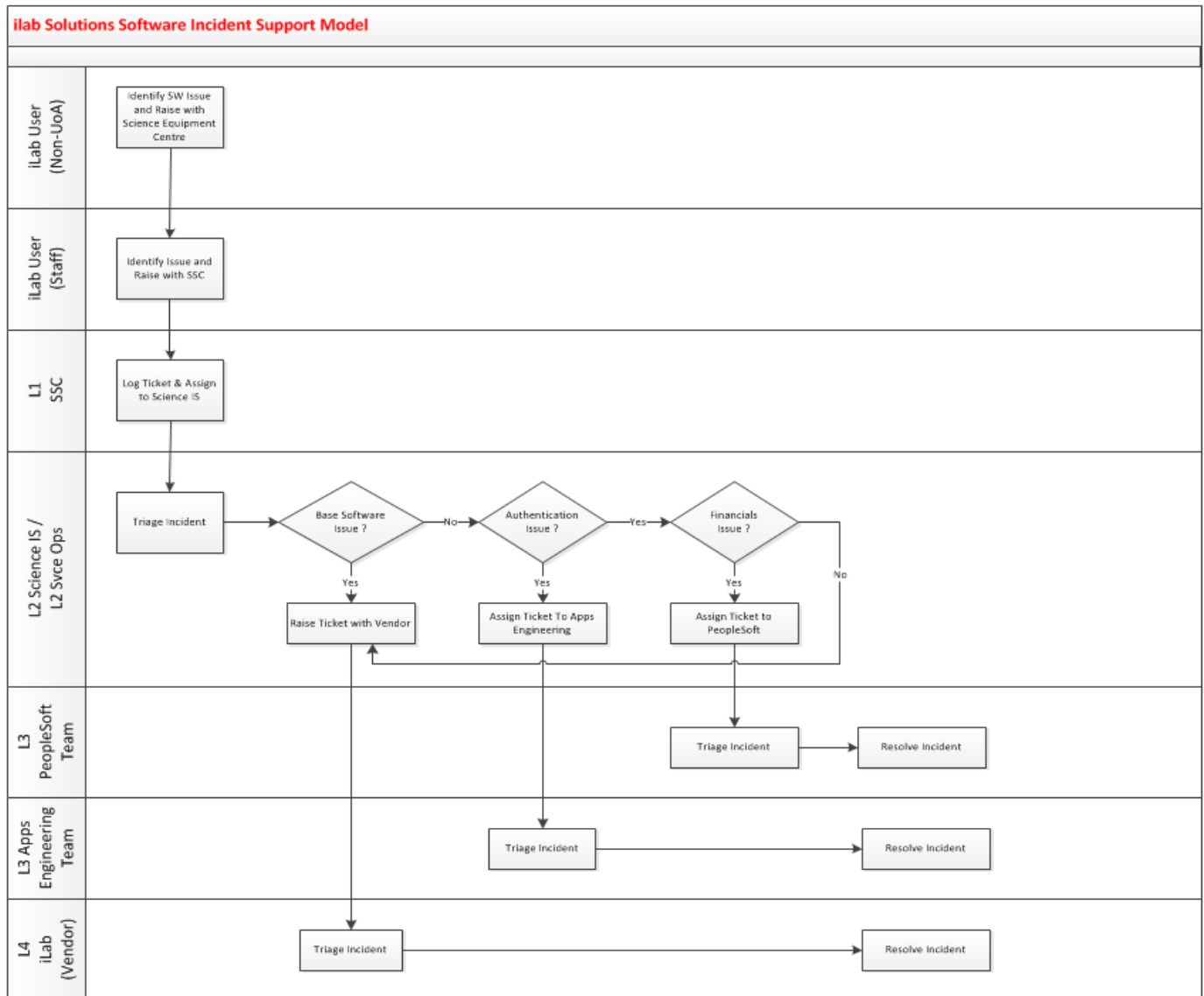
As the vendor's Service Desk is based in Boston, Massachusetts, application support is provided in two ways:

- Online support via the vendor web site 24x7
- Phone and email support (NZ time) Tuesday to Saturday 8.30am-midnight
 - Phone = +1 617 297 2805
 - Email = support@ilabsolutions.com

See support model diagram below.

9. Incident Process

The following describes the process to be followed where there are software-related issues:



The following table outlines the levels of support for the iLab Booking Software Application:

Role	Team/Person
Business Owner	David Jordan, Director of Finance, Faculty of Science
Level 1 Support	Staff Service Centre (SSC)
Level 2 Support – Application	Science IS (will migrate to L2 Service Operations Team at a later date)
Level 2 Support – Infrastructure	N/A
Level 2 Support – Operating System	N/A
Level 2 Support – Database	N/A
Level 3 Support	Authentication – Apps Engineering Team PeopleSoft – PeopleSoft Team
L4 Support	iLab Solutions (vendor)

10. Organisation Model

The following diagram shows the various stakeholder groups in Faculty of Science that affiliate to both the ASAS model and the iLab Solutions software:

