1. What is iLab and how does it work? ................................................................. 2

2. Terms & Definitions ............................................................................................ 2
   2.1. Roles ............................................................................................................... 2
       2.1.1. Principal Investigator - Supervisor ....................................................... 2
       2.1.2. Lab Manager ......................................................................................... 3
       2.1.3. Lab Member - Researcher ................................................................. 3

3. Registration And Logging In .............................................................................. 3
   iv. University of Auckland User ...................................................................... 3
   v. Tuakiri (Other Academic) User ................................................................. 4
   vi. External or Commercial User ................................................................... 4

4. Accessing a Laboratory and Project Codes ...................................................... 5
   i. How to sign up for a Supervisor/PI's Lab ..................................................... 5

5. Lab Management .................................................................................................. 5
   i. Principal Investigator (and Lab Manager) Home Page .............................. 5
      1.1. Manage Lab Settings ............................................................................. 7
      1.2. Set Quote Amounts, default request approvals and edit Lab members 8
      ii. Approving membership requests ......................................................... 9
      iii. Create Budgets and Monitor Spending .............................................. 9
      iv. Approving and Assigning Fund (Project Codes) for Lab Members .... 9
   v. Managing Press Accounts ....................................................................... 10
      vi. delegating lab manager &/or financial manger in lab ....................... 11
      vii. approving project requests .............................................................. 11
      viii. monitoring project milestones ...................................................... 11
     ix. disabling, enabling projects .......................................................... 11
     x. Setting default request approval limits ............................................ 11
   1.3. Researcher Home Page ........................................................................... 11

6. Service Requests .................................................................................................. 13
   i. How do I Request a Service? ................................................................. 13
      1.1. Viewing your requests once initiated .......................................... 16
      ii. Update Payment Information for Service Requests ..................... 17
      iii. Communication in iLab about Requests .................................... 18
      iv. Print the Request Details .............................................................. 19
   v. Approve Researcher Service Requests ........................................... 20
   vi. Download Results and Documents .................................................. 21
   vii. Track the History of the Project ....................................................... 21

7. Reserving Equipment .......................................................................................... 22
   i. Schedule Time on Calendars .................................................................. 22
   ii. Provide Payment Information ............................................................. 25
   iii. Approve a Quote ................................................................................. 26

8. Project/fund related questions .......................................................................... 27
   i. How iLab uses Funds and Project Codes ............................................. 27
   ii. Not able to access or use project codes? .......................................... 27
      i. A researcher is unable to see any project codes in iLab? ............... 27
      ii. There is a missing project code that is not available in iLab? ....... 28
1. What is iLab and how does it work?
1. The Faculty of Science, University of Auckland implemented and integrated iLab solutions web-based management software in late 2014. The Centre Facility Management package was implemented to support request and resource management, billing and invoicing for internal and external customers of the Faculty of Science for ASAS centres. These include:
   i. Bioinformatics centre
   ii. DNA sequencing centre
   iii. Genomics centre
   iv. Mass Spectrometry centre
   v. Imaging centre
   vi. X-Ray centre.
2. The software was integrated into the University of Auckland’s PeopleSoft (Enterprise Resource Planning software) and our identity management system so that all users can register and login using their University credentials (Single Sign On) including using the Tuakiri Federation for external academics.
3. iLab provides the following services for University of Auckland and other users:
   i. Request management – ordering and managing service requests from centres
   ii. Resource scheduling – booking and managing reservations equipment from centres
   iii. Billing and invoicing – for internal and external customers

2. Terms & Definitions

1.1. Roles

1.1.1. Principal Investigator - Supervisor
As a Principle Investigator (PI), your responsibilities in iLab are a little more formalized than they might have been. These responsibilities are necessary to enable your researchers to order services from the ASAS centres and to reserve equipment, specifically:
   a. Accepting requests from your staff and students to become members of your lab.
   b. Requesting access to PReSS accounts for PhD students in to your lab.
   c. Assigning funds to lab members.
   d. Approving certain centre service requests.
   e. Managing lab members and their respective authorities.

As a PI or Financial Administrator, you have the opportunity to manage different parts of your lab's work with centre facilities using iLab. You can setup an auto- approval threshold, allowing
researchers in your lab to schedule equipment use or order services from centres under this price threshold without further approval. You can also use iLab to create budgets and monitor spending for specific centres. iLab also enables you to review, and approve or update centre service requests placed by members of your lab.

1.1.2. Lab Manager
The Lab manager role has the same, full functionality as the Principal Investigator of the lab with the option to be listed as the main financial contact. This role is typically used when the Principal Investigator wishes to select a delegate to "manage" the lab on the Principal Investigator's behalf.

1.1.3. Lab Member - Researcher
A member of a lab working beneath the principal investigator have view only access to Memberships and Fund Information, to see who belongs in the lab and what project codes (funds) they have access to use.

This role is typically the "centre customer" requesting services and making reservations into the centre.

3. Registration And Logging In

iv. University of Auckland User
To register for an account:
2. Select the login button for the University of Auckland Login option.
3. Log in with your UPI or UID and password.
4. Upon successful authentication, you will be prompted to select you PI/lab from the pull down list and provide your phone number.
5. Submit the completed registration form. Submission will notify you PI and/or lab manager of your lab membership request.
6. You will be sent an email with basic instructions on using the system. If you are a post graduate student or a professional member of staff, your lab membership request will also need to be approved by your PI or delegated Lab Manager and you will need to have been assigned a Project ID to charge your work to.

Logging In
1. Go to https://asas-centres.ilabsolutions.com/account/login to login. Preferred browsers are Chrome and Firefox.
2. Select the login button for the University of Auckland Login option.
3. This will take you through to your iLab home page. If you are taken to a registration page, please submit a ticket with the Staff Service Centre.
4. Look for the link in the left hand menu that says 'my labs'. Hover-over this link and select your lab to go to your lab management page.

If you require further support, in the first instance please speak with your relevant Centre Manager – information and contact details available via the Auckland Science Analytical Services website http://www.science.auckland.ac.nz/en/for/business-employers-and-community-2/analytical-services.html
v. **Tuakiri (Other Academic) User**

**To register for an account:**

1. Go to https://asas-centres.ilabsolutions.com/account/login to login and register. Preferred browsers are Chrome and Firefox.
2. Select your institution from the Tuakiri NZ Access Federation drop down list.
3. Log in with your Institution credentials (username and password).
4. Upon successful authentication, you will be prompted to.
5. Submit the completed registration form. Submission will notify you PI and /or lab manager of your lab membership request.
6. You will be sent an email with basic instructions on using the system. If you are a post graduate student or a professional member of staff, your lab membership request will also need to be approved by your PI or delegated Lab Manager and you will need to have been assigned a Project ID to charge your work to.
7. You will be asked for relevant billing information. Submit the completed registration form. Submission will confirm with the user by email from iam.auckland.ac.nz.
8. The user completes the registration instructions provided in the confirmation email.

**Logging In**

9. Select the login button for the University of Auckland Login option.
10. If you are taken to a registration page, please submit a support ticket via the iLab (link/tab upper right corner) or email support@ilabsolutions.com


vi. **External or Commercial User**

1. Go to https://asas-centres.ilabsolutions.com/account/login to login and register. Preferred browsers are Chrome and Firefox.
2. If you have not previously registered for a University of Auckland account, visit the UOA Single Sign On Account login page and register for an account. This will provide you with a UPI and password to access iLab.
3. Once you have an account, you can log in with your UPI or UID and password.
4. Upon successful authentication, you will be prompted to select you PI/lab from the pull down list and provide your phone number.
5. Submit the completed registration form. Submission will notify you PI and /or lab manager of your lab membership request.
6. You will be sent an email with basic instructions on using the system.

4. Accessing a Laboratory and Project Codes

i. How to sign up for a Supervisor/PI’s Lab

Once you have registered for an account, you will need to request membership to an appropriate Supervisor (Principal Investigators) Lab within iLab. Unless you are a Principal Investigator yourself, in which case your Lab will be available under ‘Manage Groups’ and ‘my labs’ option.

To request membership to a Lab you entering PI's name in the search box in the Membership tab, request access membership, receive approval.

Membership requests have to be approved by the PI or Lab manager for the lab, without this approval researchers cannot book equipment or request services.

You may need to speak with the relevant supervisor directly or via the iLab communications to remind them to approve your membership.

If you require further support, in the first instance please speak with your relevant Centre Manager – information and contact details available via the Auckland Science Analytical Services website http://www.science.auckland.ac.nz/en/for/business-employers-and-community-2/analytical-services.html

5. Lab Management

i. Principal Investigator (and Lab Manager) Home Page

When you first log into iLab make sure you update your time zone by choosing your correct time zone and then clicking on Update my time zone. After you update your time zone you will either land on the centre’s page you logged into or you may land on your homepage Figure 1. On your homepage you can view quick links to facilities you often use, view requests that require your attention and view a list of your reservations. You have menu options to manage your account, manage your support tickets and find lists of centres that you can access through iLab when you are on any page in iLab.

Figure 1. Your Homepage.
The home menu option on the left side of the page (Figure 1.1) will take you to your homepage and homepage panels. Under homepage is the Communications menu option where you can view emails sent through the iLab system. If your lab also utilizes the iLab Lab Management system, you will see menu options on the left side of the page for requisitioning.

Under centre facilities (Figure 1.2) you may see my reservations where you can view past and future reservations you have with centres. You can see requests of services or projects that you have submitted to centres from the view requests link and you can see a list of centres that you can access from list all centres.

Under manage groups (Figure 1.3) you can view my labs to see details about your lab and lab members. The upper-right hand corner provides links for you to contact iLab support with leave iLab feedback, manage your account in my profile and manage your created support tickets from support (Figure 1.4). If you contact us through leave iLab feedback, you will be sending a message to the iLab support team so you will receive the most comprehensive support. This will also enable you to track your support tickets. You can view the support tickets you have sent by clicking on support. You can view videos with basic instructions on how to make a request on Screen Casts on the support page.

In my profile you can update your name, log-in information, password, and manage how you want to receive system-generated messages in Manage Communications Preferences.

Your homepage will have panels with different kinds of information. Each panel will have a help tab (Figure 1.5) with more information about the information seen in the panel.

Figure 2. On the homepage you will see the Home panel that will have quick links to centres you use.

Under the Home panel you may see a Service Request panel. This panel will have any requests that require your attention in the alerts tab (Figure 3.1). Requests that require attention could be ones that require your approval, ones that are missing payment information or ones that you have not submitted to the centre. Lab heads will see requests from all of their lab members and for themselves that require approval in the Service Request panel.
Figure 3. Under the Service Request Panel you will see requests that require your attention under alerts.

Under the info tab you will see up to twenty of your most recent requests (Figure 3.2). You may also see a Scheduled Events panel that will show any of your reservations that are still pending centre approval in the alerts tab, and all of your future reservations, up to fifteen, in the info tab.

Figure 4. See reservations that are pending approval and your future reservations in the Scheduled Events panel.

If you require further support, in the first instance please speak with your relevant Centre Manager – information and contact details available via the Auckland Science Analytical Services website http://www.science.auckland.ac.nz/en/for/business-employers-and-community-2/analytical-services.html

1.1. Manage Lab Settings

Once you have logged in to iLab, use the left-hand menu to navigate to different parts of the system. To manage different settings for your lab, hover over or click on the my labs menu option. If you are a manager or administrator of multiple labs, these will be listed. Click on the lab name to open a management view (Figure 5).
If you require further support, in the first instance please speak with your relevant Centre Manager – information and contact details available via the Auckland Science Analytical Services website http://www.science.auckland.ac.nz/en/for/business-employers-and-community-2/analytical-services.html

1.2. Set Quote Amounts, default request approvals and edit Lab members

Once logged in and within your Lab (manage groups, my Labs option) the Principal Investigator (or delegated Lab Manager/Financial Administrator for the Lab) can:

- Set the default approval amount for requests e.g. the limit researchers can spend without requiring supervisor approval
- Review members of your lab, their details and administration functionality e.g. researchers and other administrators
- Add new users to their Lab e.g. request for other UoA academics and researchers to be members of your lab
If you require further support, in the first instance please speak with your relevant Centre Manager – information and contact details available via the Auckland Science Analytical Services website http://www.science.auckland.ac.nz/en/for/business-employers-and-community-2/analytical-services.html

ii. Approving membership requests

iii. Create Budgets and Monitor Spending

iv. Approving and Assigning Fund (Project Codes) for Lab Members

Approving Funds for Lab Members

v. Managing Press Accounts
Press Accounts are owned by the PHD students in PeopleSoft. However, due to UOA approval requirements, the Students Supervisor (PI) has to grant access/permission to the student (via their Lab) and approve expenditure against the project code.
The owner of the PReSS account i.e. the PhD student, will be notified by email of the request by their PI to bring the students PReSS account into the PI’s lab.

**vi. delegating lab manager &/or financial manager in lab**

**vii. approving project requests**

**viii. monitoring project milestones**

**ix. disabling, enabling projects**


**x. Setting default request approval limits**

### 1.3. Researcher Home Page

When you first log into iLab make sure you update your time zone by choosing your correct time zone and then clicking on *Update my time zone*. After you update your time zone you will
either land on the centre’s page you logged into or you may land on your homepage (Figure 1). On your homepage you can view quick links to facilities you often use, view requests that require your attention and view a list of your reservations. You have menu options to manage your account, manage your support tickets and find lists of centres that you can access through iLab when you are on any page in iLab.

Figure 1. When you first log into iLab, you may land on your homepage. You can also navigate to the homepage by clicking on home at the upper-left corner. On the homepage you can find quick links to centres, requests and services that are relevant to you.

The options on the left-hand panel and upper-right panel can be accessed regardless of the page you are on in iLab. The home menu option on the left side of the page (Figure 1.1) will take you to your homepage and homepage panels. Under home is the Communications menu option where you can view emails sent through the iLab system. If your lab also utilizes the iLab Lab Management system, you will see menu options on the left side of the page for requisitioning.

Under centre facilities (Figure 1.2) you may see my reservations where you can view past and future reservations you have with centres. You can see requests of services or projects that you have submitted to centres from the view requests link and you can see a list of centres that you can access from list all centres.

Under manage groups (Figure 1.3) you can view my labs to see details about your lab and lab members. If you are a Principal Investigator or Lab Manager please review ‘Principal Investigator (and Lab Manager) Home Page’ for more details about managing your lab in iLab.

The upper-right hand corner provides links for you to view recent updates, contact iLab support with leave iLab feedback, manage your account in my profile and manage your created support tickets from support (Figure 1.4). If you contact us through leave iLab feedback, you will be sending a message to the iLab support team so you will receive the most comprehensive support. This will also enable you to track your support tickets. You can view the support tickets you have sent by clicking on support. You can view manuals (like this one) with basic instructions on how to make a request and reservations on Generic Help Documents on the support page.

In my profile you can update your name, log-in information, password, and manage how you want to receive system-generated messages in Manage Communications Preferences. Under the menu options is a search bar. If you are only a user of centres, you can use this search bar to find services and resources list in iLab for your institution (Figure 1.5).
If you also use our lab materials requisitioning system, you can search for centre facility services and for products. When you are on your homepage, you will see panels will have panels with different kinds of information. Each panel will have a help tab (Figure 1) with more information about what you can see in the panel.

Figure 2. You can access quick links to centres and resources you have used in iLab in the panels on your homepage.

Under the Home panel you may see a Service Request panel. This panel will have any requests that require your attention in the alerts tab (Figure 2). Requests that require attention could be ones that require your approval, ones that are missing payment information or ones that you have not submitted to the centre. Lab heads will see requests from all of their lab members and for themselves that require approval in the Service Request panel.

If you require further support, in the first instance please speak with your relevant Centre Manager – information and contact details available via the Auckland Science Analytical Services website http://www.science.auckland.ac.nz/en/for/business-employers-and-community-2/analytical-services.html

6. Service Requests

i. How do I Request a Service?

To request a service, login to the centre's web page by following the directions you received in the iLab welcome email, or by using the centre’s direct link, if centre staff has provided you with the link. Note: The centre facility staff has the ability to edit the information seen on their site. The instructions below are general instructions. When you land on the centre’s page, you may not see exactly the information provided in this manual, but we hope this will guide you through the basic steps.

To initiate a service request go through the steps outlined in Figure 1 and Figure 2.
Figure 1. To view and request services provided by the centre, click on the Request Services tab.

1. To submit a service request to a centre, once you have landed on the centre’s page, click on the Request Services Tab. (Figure 1)
2. Select the service of interest and click on request service.
3. Fill out all information on the subsequent form. Required fields are highlighted with a red star to the left of the field title (Figure 2).
4. Make sure that you click save form once you have filled out all of the required fields
5. Choose the appropriate payment information, when applicable
6. Click Submit request to centre
Fill in all of the required fields in the form.

Save the completed form.

Enter a payment number, if required.

Submit the request to the core.
Figure 2. To initiate the request, fill out and save the form, enter any valid payment information and submit the request to the centre.

The centre staff is able to generate their own forms. This being said, if you have any questions about the services listed on the centre’s site or questions about the form, please contact the centre staff directly. You can either click on Contact Us to leave a message for the centre, or you can look at the About Our Centre tab to see who the centre contacts are and more information about the centre.

Figure 3. Reference the About Our Centre tab to see more information about the facility or click on Contact Us to leave facility staff a message.


1.1. Viewing your requests once initiated

You can review any of your requests by clicking on the View My Requests tab on the centre’s page, once you have logged in. On this tab you can use the light blue Find bar to search for specific requests. You also can view all of your requests and see what status they are.
Click on the blue arrow icon to the left of any request row to expand and view details for the request.

Figure 1. On the View My Requests tab on the centre's page, you can view all of your requests with the core to see request details and the status of the request.

If you require further support, in the first instance please speak with your relevant Centre Manager – information and contact details available via the Auckland Science Analytical Services website http://www.science.auckland.ac.nz/en/for/business-employers-and-community-2/analytical-services.html

ii. Update Payment Information for Service Requests

On the far right side of the request row there are icons you can use to help you manage your requests. The first icon is a dollar sign icon (💰). This icon allows you to view the payment number per charge and to update your payment number. Depending on the centre's settings, you may even be able to use multiple payment numbers per charge if you see the double arrow icon (↔).
Figure 1. You can update the payment information for the project at any time during the course of the project. Make sure to choose the charges that the new payment number applies to when updating the payment information.


### iii. Communication in iLab about Requests

To communicate about a request, click on the "comment" icon (💬) at the top of the request row and enter the message you would like to send. In the message pop-up, choose who you want to send the email to and enter in your message. The email sent will include a link to the request.
Choose who you want to send the note to, include a message then click on send.

**Figure 1.** Click on the communication bubbles to send an email about the request. If you use iLab for your communications, they will be tracked within the request.


### iv. Print the Request Details

The icon ( ) to the farthest right on the request row allows you to print out different aspects of the request. You can choose to print out all sections of the request or just one section like the form. There is also a print icon ( ) on each form within the request that you can use to print just the form.

v. Approve Researcher Service Requests

Figure 1. You can access quick links to centres and resources you have used in iLab in the panels on your homepage.

Under the Home panel you may see a Service Request panel. This panel will have any requests that require your attention in the alerts tab (Figure 1). Requests that require attention could be ones that require your approval, ones that are missing payment information or ones that you have not submitted to the centre. Lab heads will see requests from all of their lab members and for themselves that require approval in the Service Request panel.

Figure 2. If you have any service requests with any centres in iLab, you will see the Service Request panel on your homepage. In this panel you will see requests that require your attentions under alerts. The info tab researchers see all of their own requests across the centres in the system for a 6 month period. The help tab gives you more information about the Service Requests panel.

Under the info tab you will see up to twenty of your most recent requests (Figure 2). For more information about the Service Request panel, click on the help tab.

You may also see a Scheduled Events panel on your homepage. This panel will show any of your reservations that are still pending centre approval in the alerts tab, and all of your future reservations, up to fifteen, in the info tab. Again, click on the help tab to see more information about the Scheduled Events panel (Figure 3).
You also have the opportunity to view the history of the communications on the request and the changes made to the request. Review the history at the bottom of the request under Comments and Service Request history (Figure 1).
You also can update your Billing and Shipping Information on the bottom of the request (Figure 1).

Figure 1. At the bottom of each request you can view the communication history on the request, changes to the request and update your billing or shipping information.


### 7. Reserving Equipment

#### i. Schedule Time on Calendars

To reserve time on calendars, login to the centre's web page by following the directions you received in the iLab welcome email, or by using the centre’s direct link, if centre staff has provided you with the link. Note: The centre facility staff has the ability to edit the information seen on their site. The instructions below are general instructions. When you land on the centre’s page, you may not see exactly the information provided in this manual, but we hope this will guide you through the basic steps.

When you are logged onto the iLab system on a specific centre’s site, a Schedule Equipment tab may be available next to the About Our Centre tab (Figure 5). When on the Schedule Equipment window, the different equipment or resources that the centre has available will be listed. To view the calendar, click on the resource name or the view calendar button to the right of the name.
Figure 1. To view a list of calendars click on the Equipment or Scheduling tab after landing on the centre’s page.

In the calendar several tabs can be accessed (Figure 5):

- Return to Schedules - to return to the list of facility resources window
- Schedule - to view the current schedule for the all of the Resource sets for the listing in the Multi View, or the Day, Week of Month of the listing
- Description - a description of the equipment
- Other Schedules - to view and access other equipment listed and calendars
- Legends & help – Click on legends and help to view pricing, a calendar color legend and reservation colour legend.
- Refresh events – Click on refresh events to refresh the calendar to see any events created or updated since you last opened the page.
- Other relevant schedules – Some facilities may have the option to view multiple calendar schedules in one view. To see the reservations on other relevant calendars, click on the other relevant schedules, and then choose the other calendars you wish to see.

The colour legend for events seen in Figure 2 is below.

- Green Events - Your future reservations
- Yellow Events - Your past reservations
- Grey Events - Reservations created by other users
- Red Events - If the equipment is unavailable for selected amount of time
- Orange Events - In some cases, centres require centre approval for reservations.
- If you have reserved time on the calendar that requires centre approval, that event will be in orange. When the reservation has been approved you may receive an email and you will see the event turn to green.
- Purple Events – When a reservation is approved by the centre it will turn purple.
Figure 2. After you click on the calendar name you will see the resource calendar. You can view multi-instances on the calendar, Day, Week, or Month view. Click and drag on the calendar to make your event reservation.

You can initiate a reservation on the calendar by clicking and dragging on the day and time of the intended usage. A window will pop up that contains information required to create the event under event details. A sample form can be viewed in Figure 3.

Figure 7. On the event details window you have information you have to enter before creating your reservation.

Under event details you can (Figure 7):
1. Adjust Availability Type which may be necessary when centres have different options to choose from like if you require assistance during your usage or not.
2. Choose which resource you want to schedule under Specify the required resources.
3. Update the time you scheduled.
4. Provide the payment information you want to use to pay for usage.
5. Sometimes a form is required to fill in to schedule an event. Under required
6. forms fields may be provided for you to fill in information.
7. Required fields are marked by a red star.
8. Action buttons are under the event details. Save the reservation, cancel changes, delete reservations and sometimes the centre may allow you to cancel the reservation.
9. Note: If you do not click on Save Reservation, your reservation will be temporarily saved for 15 minutes. Be sure to click on Save Reservation or Cancel Changes before exiting the event details window.
10. The ‘add a comment link’ is provided for comments to be added to the reservation. All comments are logged and can be viewed by anyone that is approved to view the reservation under comments at the bottom left of the form.

**Note:** Depending on the settings determined by the centre, you may be able to alter future reservations and past reservations. In many cases, the centre tracks actual usage by a log accessible on the equipment. Please be sure to log in and out on the equipment log so the centre can track actual usage correctly.

**Note:** Some calendars are only available to trained users of the equipment. If you click on view schedule and do not see a calendar, please contact facility staff to inquire about how to gain access to the calendar.

**ii. Provide Payment Information**

When requesting a service or booking equipment you can allocate the costs to project codes (funds) that have been available to you by your Principal Investigator or Laboratory Manager.

If completing a project for Uniservices you will need to be a member of the Uniservices Institute (Refer to Researcher Access to Uniservices). This will provide ‘**UniServices (Auckland UniServices LTD) Lab** as an option to select for providing payment information.

You will need to provide a Purchase Order number for work to be approved by the Centre, as per standard Uniservices processes.

If you require further support, in the first instance please speak with your relevant Centre Manager – information and contact details available via the **Auckland Science Analytical**
iii. Approve a Quote

Once the centre has reviewed and approved your request, the centre may provide you with a quote or cost estimate by email. The email will contain a summary of the request with a direct link to your request where you can review the request including milestones and any anticipated charges. When you are ready to approve the quote you can click on Agree on the right of the quote. At this time you may be able to update your payment information, if necessary, and even set a different amount you agree with.

Figure 1. After logging in from the email you receive, you can view the request details, projected cost (quote) and agree to the project.
Once you click on Agree, the centre will be notified of your intent to continue with the work, and will notify you when work begins on your project and at other important milestones, including project completion.


### 8. Project/fund related questions

#### i. How iLab uses Funds and Project Codes

iLab software is integrated into the University of Auckland’s PeopleSoft system, providing researchers with access to Funds (project codes) for the purposes of hiring equipment and services. PeopleSoft provides iLab with a list of project codes in a nightly process. Once equipment and service use has been confirmed, a billing file is created and sent from iLab to PeopleSoft to ‘journal’ the costs to researchers nominated project code. These codes can be for Research office projects, research enhancements and standard department operating funds.

For a fund to be provided and valid (able to be billed to) the project codes requires the following:

- a valid project owner i.e. that the researcher is specifically nominated as the fund ‘owner’ within PeopleSoft
- a valid end date. Some of the project codes that you are using on a day to day basis can have an expired end date in PeopleSoft (this doesn’t impact is function in PeopleSoft). However, iLab requires an valid end date


#### ii. Not able to access or use project codes?

##### i. A researcher is unable to see any project codes in iLab?

For a researcher to be able to use a project code within iLab, their Supervisor (Principal Investigator or Lab Manager) has to ‘assign’ them project codes within their Lab.

If a researcher has not been provided any project codes, then you will need to ask your Supervisor (Principal Investigator or Lab Manager) to do so.

Refer to PI - roles & responsibilities: Approving and Assigning Fund (Project Codes) for Lab Members.

ii. There is a missing project code that is not available in iLab?

If a project code does not have a project owner or a valid end date, it will not be available in iLab.

To check the status of your project code you can contact your faculty/department accountant who can check its status in PeopleSoft (where all iLab project code and funding information comes from).

They can access the following form, via the staff intranet. “Project Code Request Form - FS-59” will provide them the project code details within PeopleSoft.

Any required changes can be submitted here to assign the Project to the appropriate researcher (using their employee/UID number) or update the end date.

A project code cannot be accessed by someone else without the appropriate access or assignment of project codes in iLab. If you have a shared project code, the owner (in PeopleSoft) can grant you access if you become a member of the project owners Lab.

To do so, please refer to Accessing a Laboratory and Project Codes

If you require further support, in the first instance please speak with your relevant Centre Manager – information and contact details available via the Auckland Science Analytical Services website http://www.science.auckland.ac.nz/en/for/business-employers-and-community-2/analytical-services.html

1.1. Researcher Access to Uniservices

Auckland UniServices Limited is the commercial research, knowledge transfer and custom education company for the University of Auckland - dedicated to connecting the University’s capabilities to business and investors, Government and the community. UniServices is a wholly-owned company of the University of Auckland.

As Uniservices is a company working within commercial research it is considered an ‘external institute’ within iLab and PeopleSoft, as such internal processes can not be used to request, manage and bill for Uniservices Projects.

University of Auckland researchers, as well as external partners and academics can request to be part of the UniServices (Auckland UniServices LTD) Lab within iLab. This will become an option for researchers under their normal Lab options, including for selecting when requesting and billing services and equipment.

To register as a member of Uniservices you can submit a request to iLab Customer Support who will add your details and set you up as a member of UniServices (Auckland UniServices LTD) Lab.

Once logged in to iLab, you will see a ‘leave iLab feedback’ link at the top right of any iLab screen. From the drop down menu select ‘Customer Support Question’ and request access to Uniservices with the following message:
“Please register me as a member for the Uniservices (Auckland Uniservices LTD) Lab”.
Click ‘Leave Feedback’.

This request will be processed by the iLab support team providing you access to request and bill services to Uniservices. You will still be required to follow standard project and Purchase Order management processes with Uniservices, as per the flow diagram below.

If you require further information regarding how to request a Purchase Order from Uniservices for a Uniservices Project, please contact the Uniservices office.
iii. How do I access my Press Account?

Press Accounts are owned by the PHD students in PeopleSoft. However, due to UOA approval requirements, the Students Supervisor (PI) has to grant access/permission to the student (via their Lab) and approve expenditure against the project code. To access your Press Account project code for booking/requesting equipment and services, your Supervisor (Principal Investigator/PI) will need to request the fund (project code) be added to their lab. Refer to section PI - roles & responsibilities: Managing Press Accounts.

Once you have approved this (giving your supervisor access to the project code in their Lab) they can assign the project code to you. Refer to PI - roles & responsibilities: Approving and Assigning Fund (Project Codes) for Lab Members.

Now the project code will be available for you to use when booking or requesting services.

If you require further support, in the first instance please speak with your relevant Centre Manager – information and contact details available via the Auckland Science Analytical Services website http://www.science.auckland.ac.nz/en/for/business-employers-and-community-2/analytical-services.html

9. Reporting

i. running reports in iLab

ii. reports available in iLab

iii. customising reports in iLab