



Idea Elan

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2020

INFINITY Software PI Guide

**Comprehensive Online Solution for
Lab and Core Facility Management**

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Quick Startup Guide for PI/ Lab Admin

Login as an internal PI:

<https://secure12.ideaelan.com/secure/Public/AppLogin.aspx>

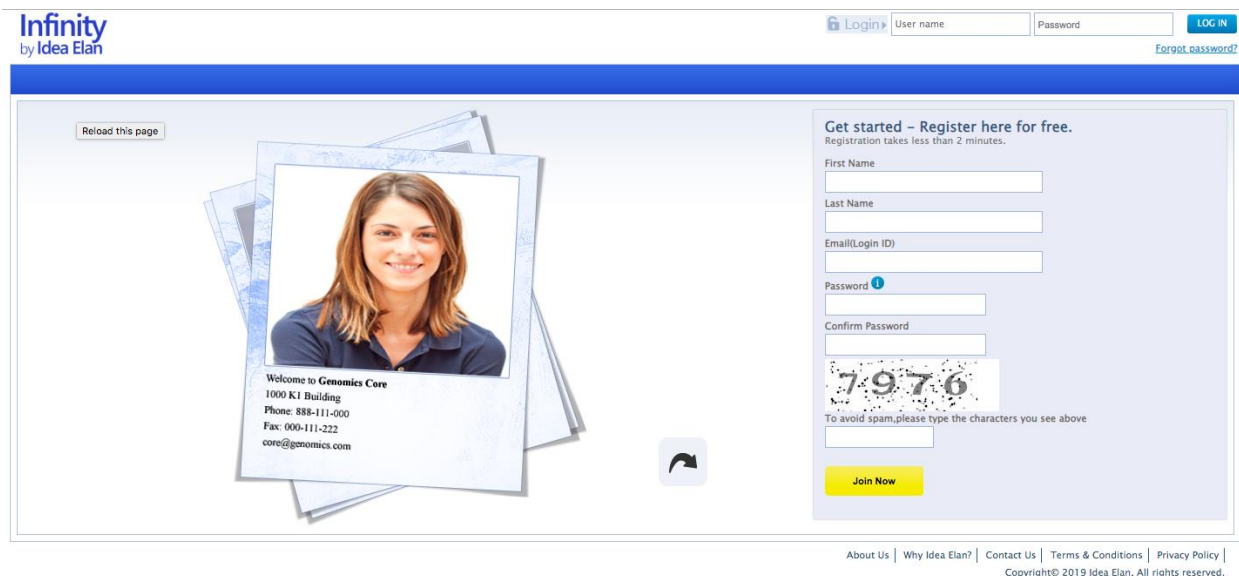


The screenshot shows the login page for the University of Mississippi. At the top left is the university's logo. The main heading is "WebID Authentication Required". Below this are two input fields: "WebID:" and "Password:". To the right of the "Sign In" button is a link for "Password Help". At the bottom, a copyright notice reads "Copyright © 2019 University of Mississippi. All rights reserved."

Login as an external PI:

<https://secure12.ideaelan.com/olemiss/Public/AppLogin.aspx>

External PI's will use the Infinity start page. Existing users can enter their information in the top right corner for username and password.

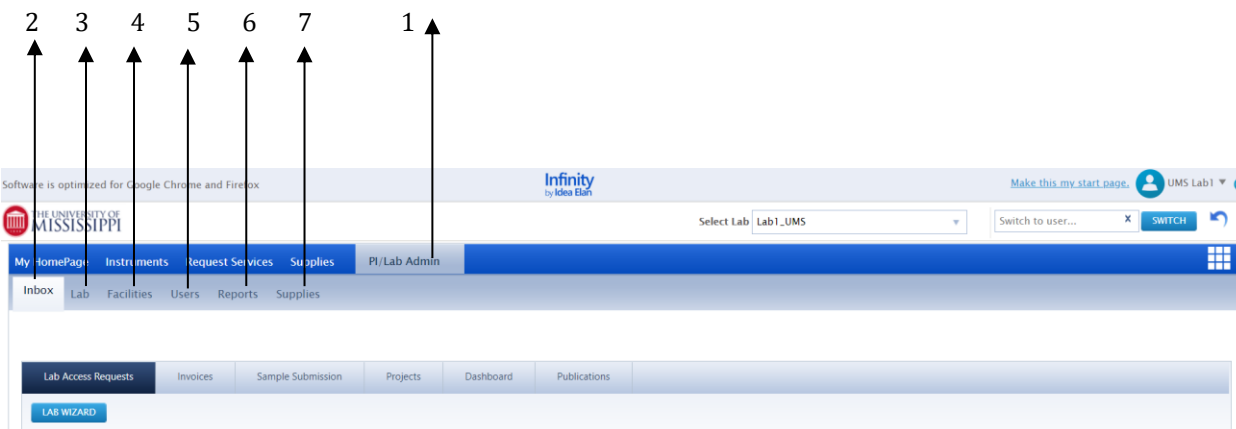


The screenshot shows the "Infinity by Idea Elan" registration page. At the top left is the "Infinity by Idea Elan" logo. At the top right are "Login" and "LOG IN" buttons, along with input fields for "User name" and "Password". Below the logo is a "Reload this page" button. The main content area features a "Get started - Register here for free." section with a registration form. The form includes fields for "First Name", "Last Name", "Email(Login ID)", "Password", and "Confirm Password". A CAPTCHA image with the number "7976" is displayed. A "Join Now" button is at the bottom of the form. To the left of the form is a "Welcome to Genomics Core" message with contact information: "1000 K1 Building", "Phone: 888-111-000", "Fax: 000-111-222", and "core@genomics.com". At the bottom right, there are links for "About Us", "Why Idea Elan?", "Contact Us", "Terms & Conditions", and "Privacy Policy", along with a copyright notice: "Copyright© 2019 Idea Elan, All rights reserved."

The Lab Admin/PI:

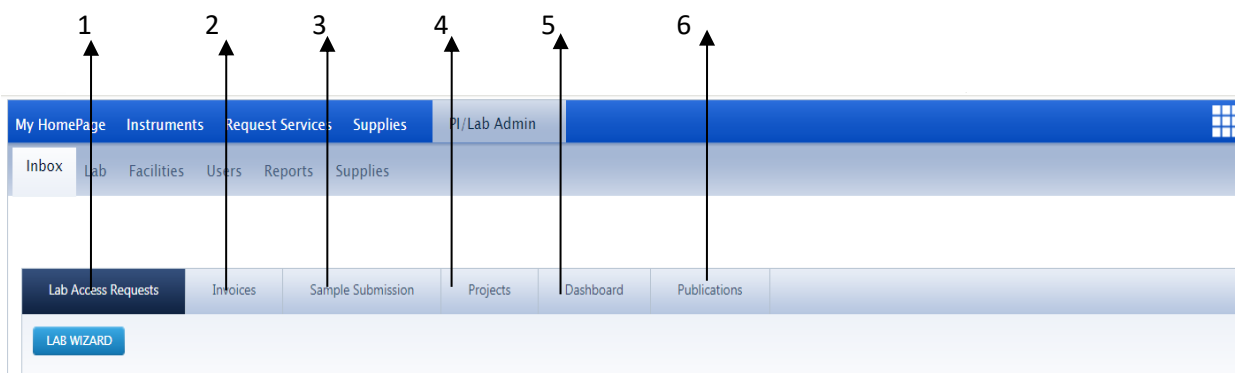
Once logged in as a PI, a toolbar with tabs will appear that are specific to your role.

Lab Admin Functions:



1. **Lab Admin:** To access all the lab admin features
2. **Inbox:** To view, accept and reject requests or approve or reject invoices.
3. **Lab:** To add lab information, billing details such as account codes/ PO Numbers, 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.

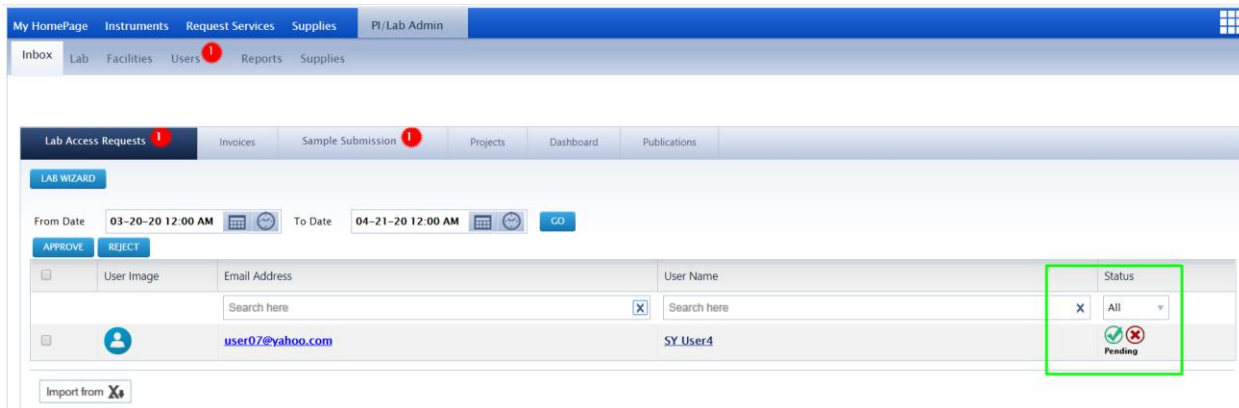
Inbox Functions:



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:** Displays the publication work by the users and PIs can keep a track of their publication.

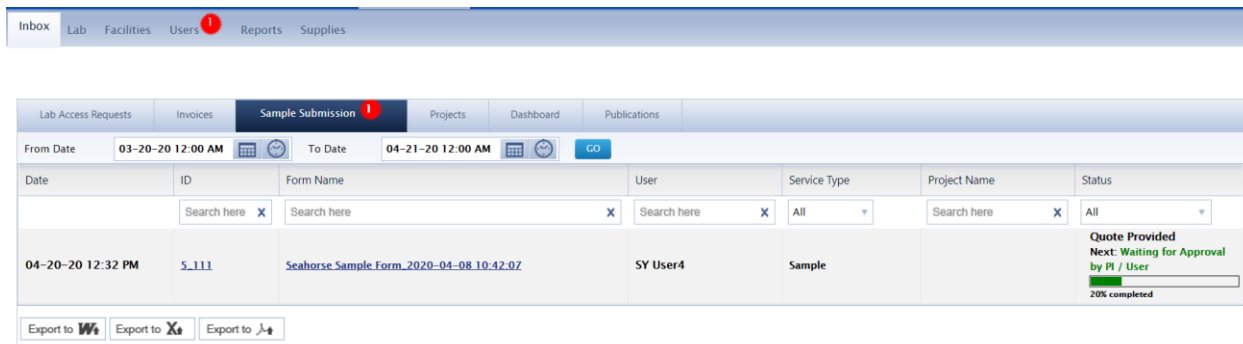
Lab Approval:

1. **User requests:** access to the lab can be approved or rejected by clicking on the green “checkmark”



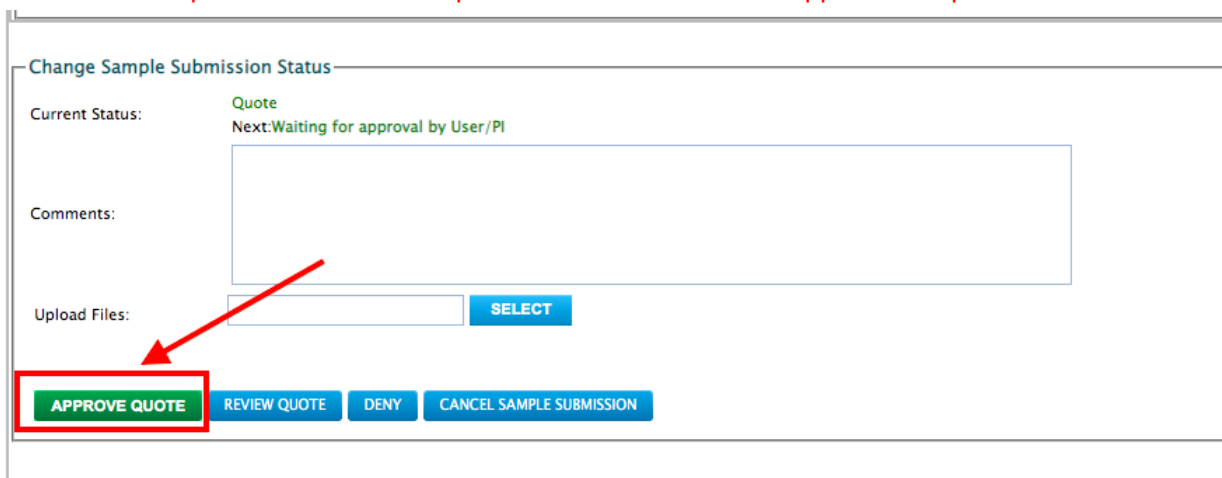
2. **Invoice:** Invoice approvals will be conducted through the business office, outside of Infinity.

- Sample Submission:** Once the user reserves the instrument and submits the sample form attached, the Facility admin will send quote for PI's approval of Seahorse usage fees.



Date	ID	Form Name	User	Service Type	Project Name	Status
04-20-20 12:32 PM	S_111	Seahorse Sample Form_2020-04-08 10:42:07	SY User4	Sample		Quote Provided Next: Waiting for Approval by PI / User <div style="width: 20%;"><div style="width: 20%;"></div></div> 20% completed

Click to open the Seahorse Sample form and scroll down to approve the quote.



Change Sample Submission Status

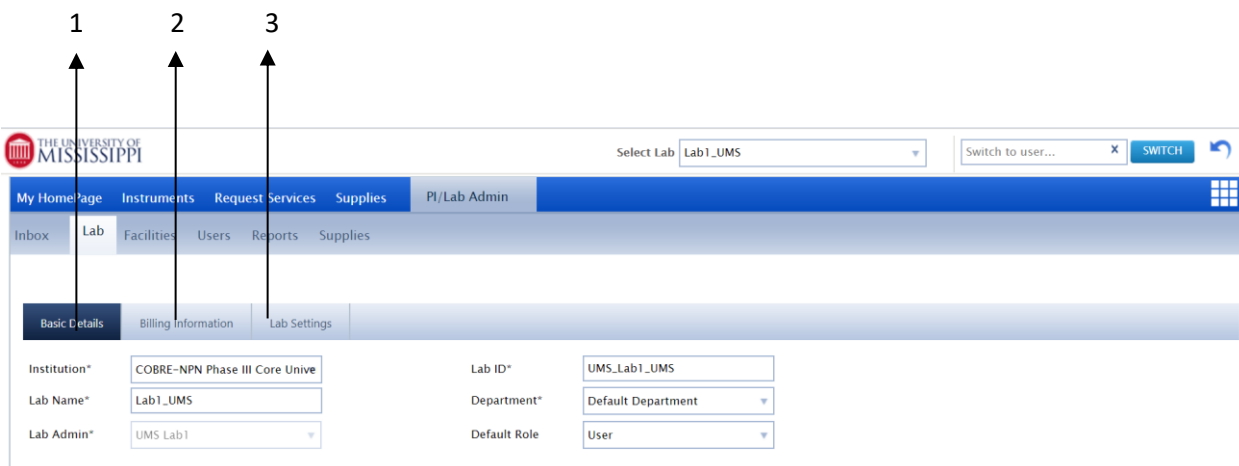
Current Status: **Quote**
Next: Waiting for approval by User/PI

Comments:

Upload Files: **SELECT**

APPROVE QUOTE **REVIEW QUOTE** **DENY** **CANCEL SAMPLE SUBMISSION**

Lab Details:



1 2 3

THE UNIVERSITY OF MISSISSIPPI

Select Lab Lab1_UMS Switch to user... SWITCH

My Home Page Instruments Request Services Supplies PI/Lab Admin

Inbox Lab Facilities Users Reports Supplies

Basic Details Billing Information Lab Settings

Institution* COBRE-NPN Phase III Core Unive Lab ID* UMS_Lab1_UMS

Lab Name* Lab1_UMS Department* Default Department

Lab Admin* UMS Lab1 Default Role User

1. **Basic Details:** Select to fill out lab information.
2. **Billing Information:** Select lab billing type and view or edit account codes or PO Numbers.
3. **Lab settings:** Click to select an alternative lab admin and set invoice approvals.

Billing Information:

Selecting the billing information tab will allow the lab admin or PI to view, add, or edit account code or PO Number information.

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

Basic Details **Billing Information** Lab Settings

Account Code Settings

All users can use any account code
 Specific account code for each user

Lab Type

Use My Account Code PO Number Bill Me Later

Enter number of Account Codes to add :

Name	Account Code *	Project(s)
<input type="text"/>	<input type="text"/>	Select Project ▼
<input type="text"/>	<input type="text"/>	Select Project ▼
<input type="text"/>	<input type="text"/>	Select Project ▼
<input type="text"/>	<input type="text"/>	Select Project ▼
<input type="text"/>	<input type="text"/>	Select Project ▼

To add an Account Code:

1. Enter a name, account code, applicable project, and an expiration date.
2. Click update at the bottom of the page.

To edit Account Code:

1. Find the Account Code at the bottom of the page.
2. Click on the pencil next to the purpose code to edit.
3. Once all information is correct, click the green check mark next to the Account Code.

Lab Type

Use My Account Code PO Number Bill Me Later

Enter number of Account Codes to add :

Name	Account Code *	Project(s)
Grant Name	555555-AB	Select Project ▼
<input type="text"/>	<input type="text"/>	Select Project ▼
<input type="text"/>	<input type="text"/>	Select Project ▼
<input type="text"/>	<input type="text"/>	Select Project ▼
<input type="text"/>	<input type="text"/>	Select Project ▼

	Name	Account Code	Project(s)
		47854	
		85489	
		12345	

Import from

Export to | Export to | Export to

Lab Settings

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.

Basic Details | Billing Information | **Lab Settings**

Lab Settings

Set Max USD for a user
 No Max USD for a user

Lab Admin Alternative

Auto approve all users

Sample submissions can be shared among users within the lab.

All invoices need to be manually approved
 Auto approve invoices that are less than USD
 Auto approve all invoices

Sample Submission / Supplies / Project Approval Process

Sample Submission User can also approve

Supplies

Project

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, it is completed by the facility admin.
- **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 can be set and applied.

Basic Details | Billing Information | **Lab Settings**

Lab Settings

Set Max USD for a user
 No Max USD for a user

Lab Admin Alternative

Auto approve all users

Sample submissions can be shared among users within the lab.

All invoices need to be manually approved
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 Auto approve all invoices

Sample Submission / Supplies / Project Approval Process

Sample Submission User can also approve

Supplies


Project

Case 1	Case 2	Case 3	Case 4
<p>User Lab Admin Facility Admin</p> <p>Submits Sample Submission Form / Order / Project Approves Completes</p>	<p>User Facility Admin</p> <p>Submits Sample Submission Form / Order / Project and it is auto approved Completes</p>	<p>User Facility Admin</p> <p>Submits Sample Submission Form / Order / Project</p> <p>Creates Quote If Quote / Order amount <= Max USD Limit set for user then approve the quote If Quote / Order amount > Max USD Limit then Lab Admin needs to approve Completes</p>	<p>User User Type</p> <p>Submits Sample Submission Form / Order / Project</p> <p>External : <input type="text" value="Case 1"/></p> <p>Internal : <input type="text" value="Case 1"/></p>

Facilities:

To view and request access to various facilities listed.

Inbox | Lab | **Facilities** | Users | Reports | Supplies

Search Facility	Institution	Facility Type	City
<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>
Seahorse	COBRE-NPN Phase III Core University of Mississippi	Default Category	
<input type="button" value="REQUEST ACCESS"/>			 Facility Image

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.

Pls can also remove user access to the lab by clicking the green check mark under the “Status” column.

THE UNIVERSITY OF MISSISSIPPI

Select Lab: Lab1_UMS

Switch to user... SWITCH

My HomePage Instruments Request Services Supplies PI/Lab Admin

Inbox Lab Facilities Users Reports Supplies

+ ADD NEW USER

User Image	Email Address	User Name	Show Account Code/PO Numbers	Status
	<input type="text" value="Search here"/>	<input type="text" value=""/>	<input type="text" value="Search here"/>	All
	f1_UMS@yahoo.com	UMS_Fac1		Active
	f2_UMS@yahoo.com	UMS_Fac2		Active
	l1_UMS@yahoo.com	UMS_Lab1		Active
	u1_UMS@yahoo.com	UMS_User1		Active

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.


Infinity by Idea Elan

Select Lab: Lab1_UMS


Switch to user... SWITCH

My HomePage Instruments Request Services Supplies PI/Lab Admin

Inbox Lab Facilities Users Reports Supplies



Lab Based Reports



Project - Lab Based Reports

Expenses over period

Inventory

Month over month Usage Report

Expenses month over month

Invoice based Report

Usage Report

Facility Based Expenses

Filter Options

Select saved report selection(s)

Report Name:

Date Range:

Select All

Account Code

Note : By default the report will be generated for all the attributes. Please check the checkbox beside the attribute to filter the report.

Select the report type, choose the required month and click on run report. Options to save the report are available. You can also export the report as a Word or PDF document.

Supplies:

Supply orders are currently not being offered by this facility.