Comprehensive Online Solution for Lab and Core Facility Management

Principal Investigator Guide
CBIA core
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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

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**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

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

<table>
<thead>
<tr>
<th>Notification Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>User submits sample submissions from that is auto approved based at Lab settings</td>
</tr>
<tr>
<td>Facility Admin submits quote for a Sample submission</td>
</tr>
<tr>
<td>Facility Admin submits quote for a Sample submission in Auto approved based at lab settings</td>
</tr>
<tr>
<td>Lab admin change a Queue</td>
</tr>
<tr>
<td>Lab admin change the status in Queue Review</td>
</tr>
<tr>
<td>Labadmin/User Approves a Queue</td>
</tr>
<tr>
<td>Facility admin changes the sample submissions status to InProgress</td>
</tr>
<tr>
<td>Facility admin changes the sample submissions status to Complete &amp; Ready to killed</td>
</tr>
<tr>
<td>Canceling the Sample Request</td>
</tr>
<tr>
<td>Institution admin Reopens the sample form</td>
</tr>
<tr>
<td>Admin changes the status of individual records as reviewed/accepted/services</td>
</tr>
<tr>
<td>Dispatched Service to lab admin</td>
</tr>
<tr>
<td>Invoice approved directly based on lab settings</td>
</tr>
<tr>
<td>Lab admin has approved a supply order request</td>
</tr>
<tr>
<td>Facility admin approves or rejects a Facility access request</td>
</tr>
</tbody>
</table>

**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.

Case 3: The user is completely new
Go to PI/Lab Admin -> Users -> Add new user. Fill the form

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

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.

- 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/PkExltzIeC-k8SBobH9TLxqMotl.x8x8EwTaQ_216IeyimY2iWkhVRkbElqXwuQkX.9MaggfiQCGFDypkR
Passcode: ?L7R2q+Q
Or

https://us02web.zoom.us/rec/share/Y-aYqwEHvCqqE-59sFCXPN-gtbEOOFcyBMLRl2ngH_ofLmuRYVzp2QEID2juFEzf.xzdrGrRPhTDz6n9I
Passcode: =+3#6lqf