



iLab

Quick Reference Guide

iLab

For Principle Investigators

26 May 2025

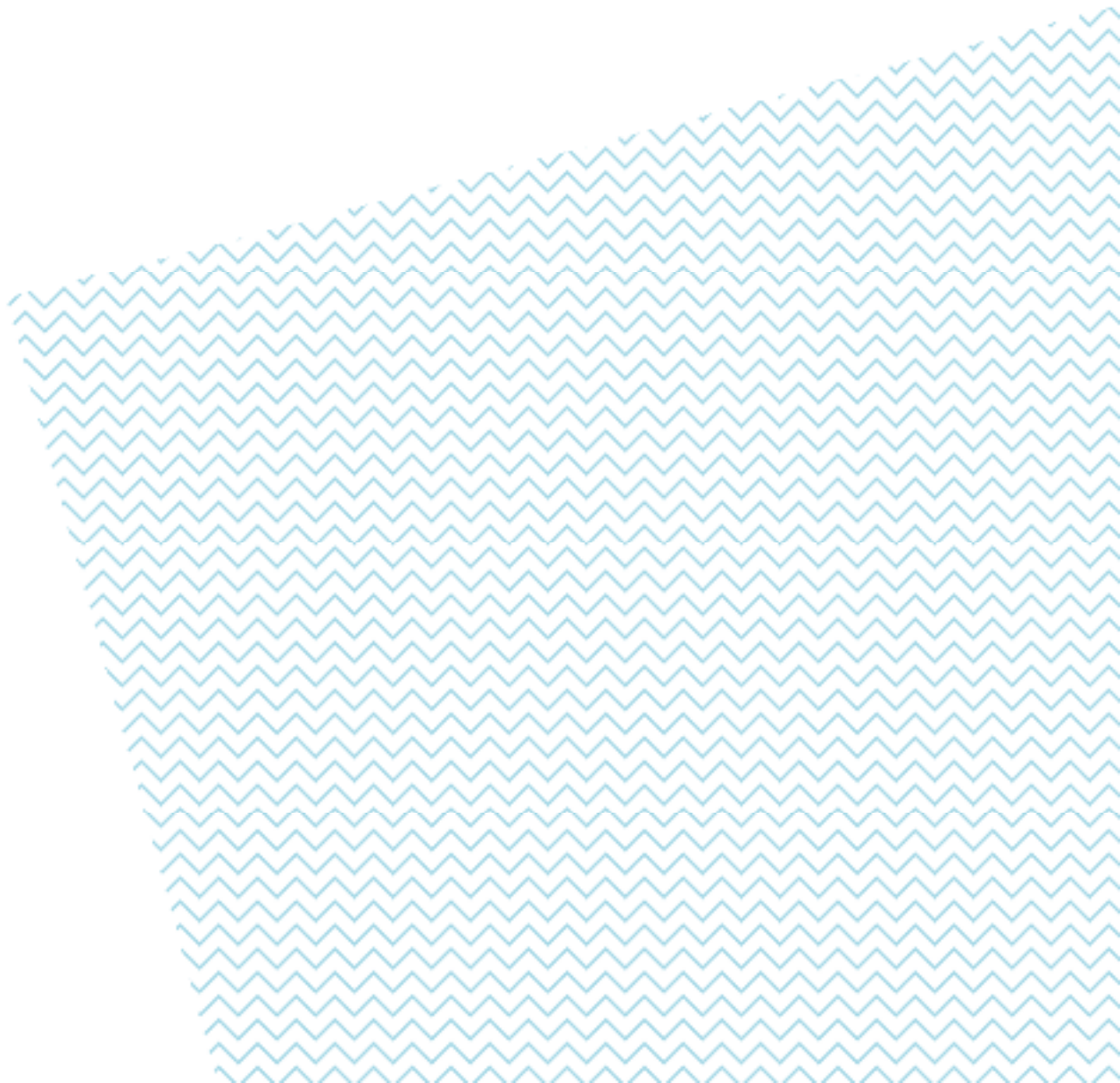
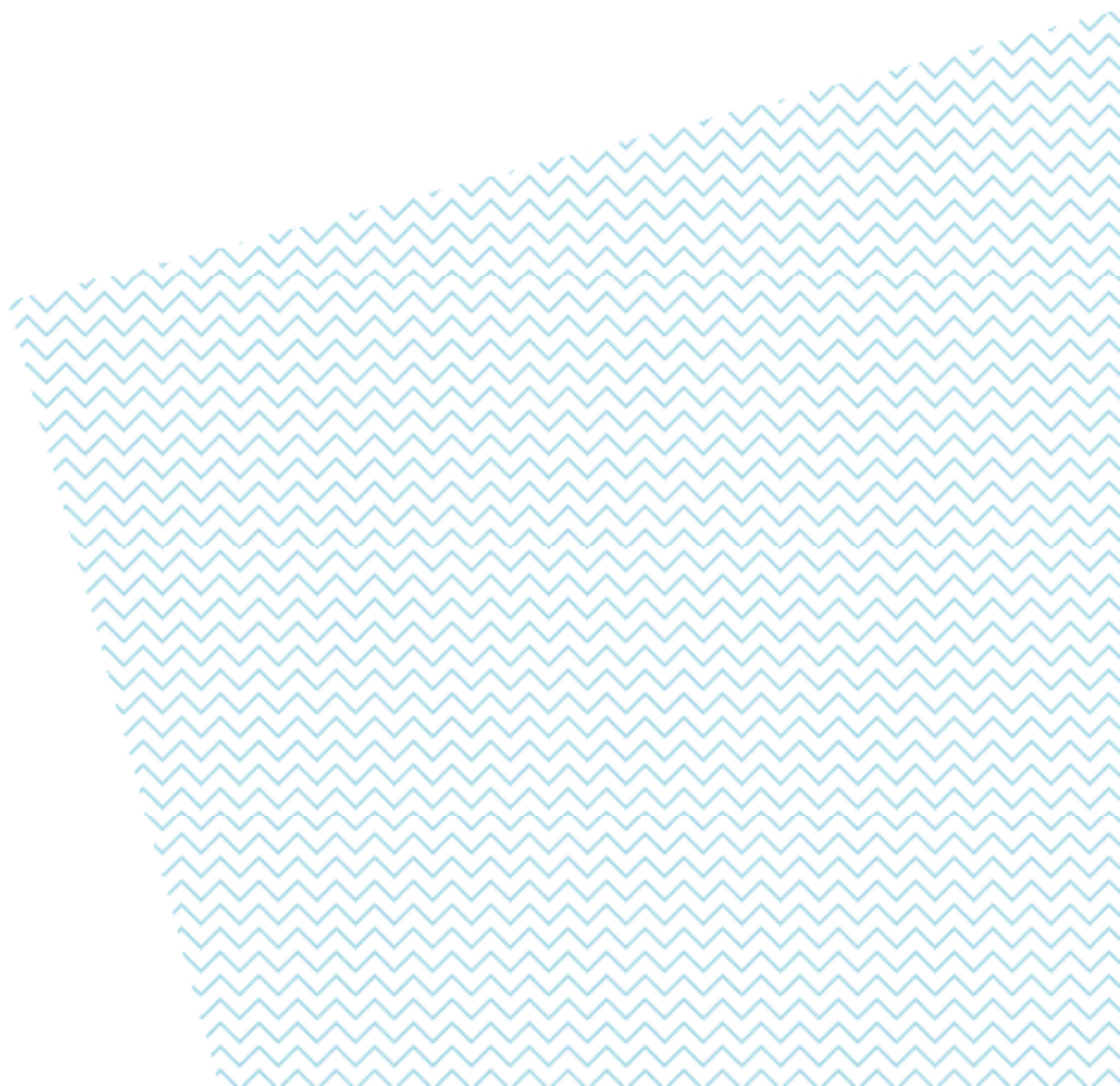


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Register for an account and lab group in iLab

University of Melbourne PI



University of Melbourne Principal Investigator (PI)

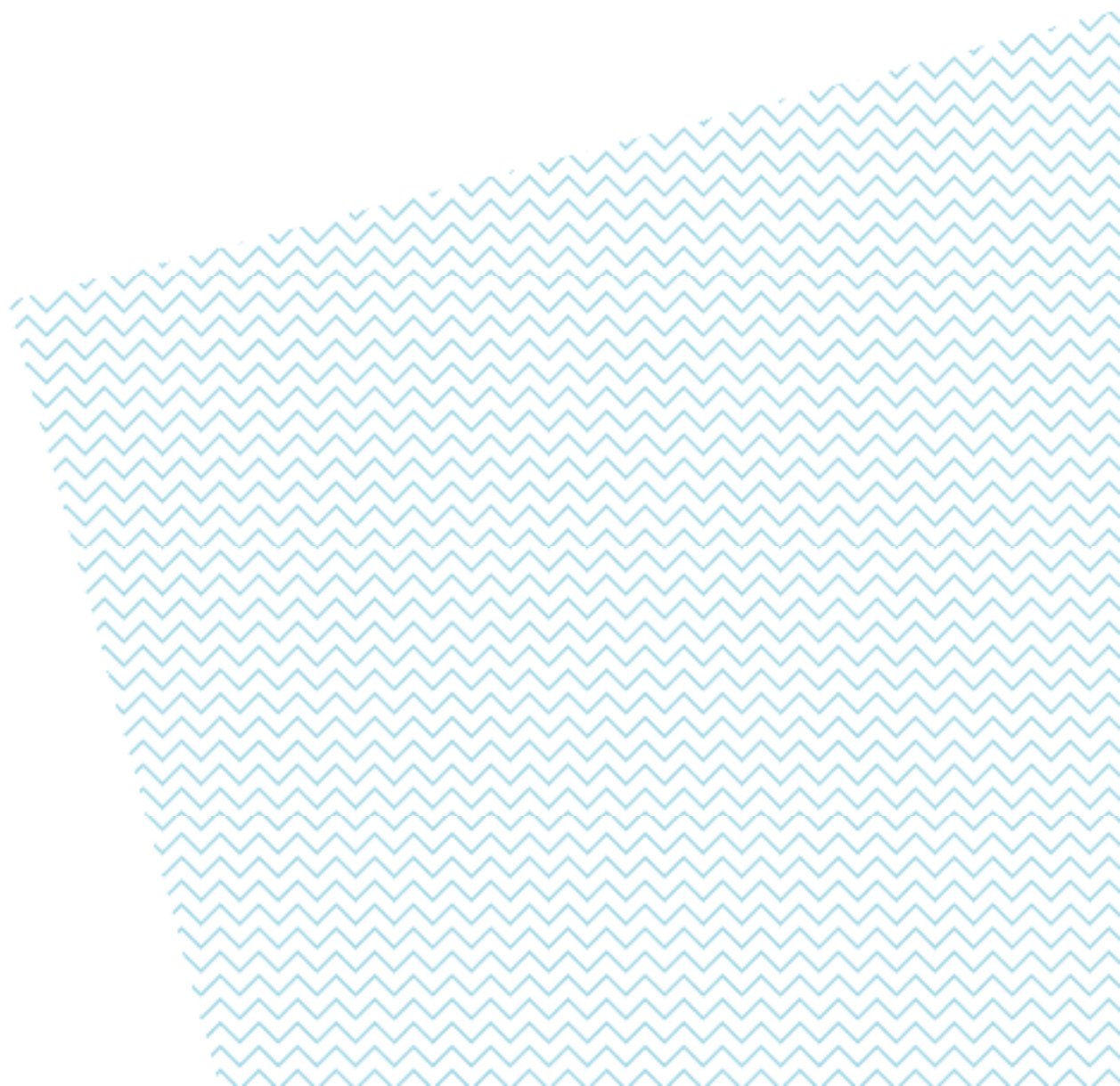
Most University of Melbourne PIs will automatically have a lab group created for them in the iLab system based on research project codes. For most PIs this should mean they can immediately go to the Sign-In process and access their account and lab group.

If you are a UoM PI that has not had a lab group automatically created, one can be manually created for you by the UoM Admin. Please fill the [UoM iLab ServiceNow Request Form](#) and choose "Create a new Lab Group for a PI". Please note a valid worktag needs to be associated with you to request the creation of a Lab Group in iLab.

Sign-in to iLab

UoM Single Sign On (SSO)

Requesting Access to Multiple Lab Groups



UoM Single Sign On (SSO)

University of Melbourne researchers can sign-in to iLab via the UoM SSO portal.

1. Navigate to the University of Melbourne's iLab Institutional Landing Page, <https://unimelb.ilab.agilent.com/>
2. On the upper-right-hand corner of the screen click '**login**'



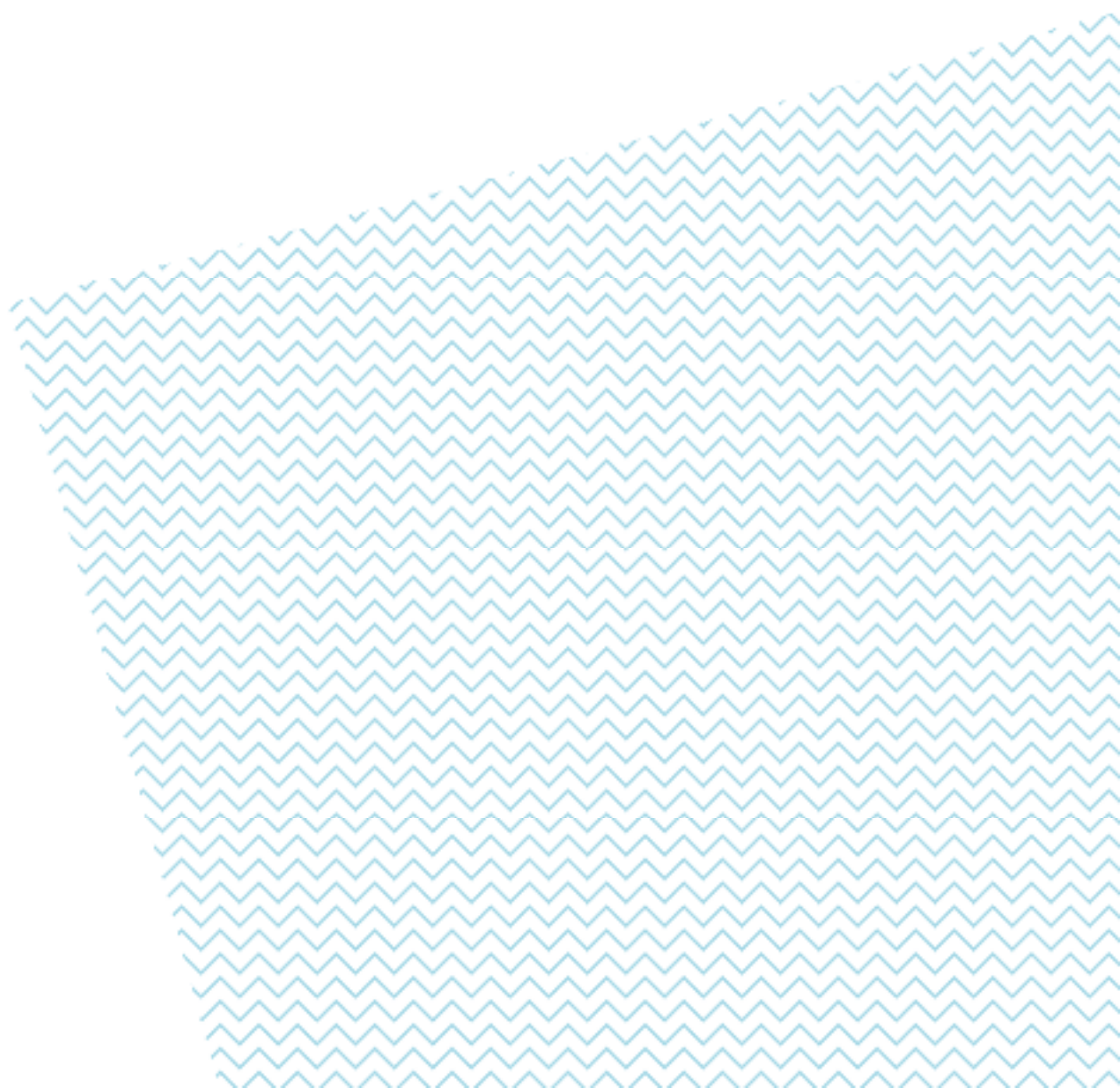
[About UoM Research Platforms](#) [Research Platforms](#) [Search](#)

Welcome to the UoM Research Platform Booking System iLab



3. Select the '**UOM User**' option
4. You will be taken to the University's SSO portal to input your credentials. Note that multi-factor authentication (MFA) is also active so you may be prompted to also authenticate via Okta

Navigating UoM Research Platform iLab Cores



Navigating UoM Research Platform iLab Cores

Agilent iLab has a consistent general appearance across all UoM Research Platforms with most end-user operations accessed via the row of tabs near the top of the page.



1 – Navigation tabs

- **About Our Core** – An overview of the platform’s research capability, services and resources, as well as contact information for the platform leadership and staff
- **Schedule Equipment** – Access the research platform’s resources including requesting training on specific resources, viewing resource schedules and booking time on permitted resources
- **Request Services** – Access the research platform’s services including general service/training requests, and specific services offered by the platform
- **View My Requests** – View requests that you have already submitted to the platform
- **Contact Us** – Submit a comment or question to the platform staff

2 – ‘Hamburger icon’ left-hand pop-out menu

- **Home** – Access service requests, messages, your cores and institutions, and all features available in the left and top navigation panels
- **Core Facilities** – List and search all core facilities at your own institution, as well as at partner institutions and other outside institutions
- **My Groups** – Manage your iLab group

3 – Help

- Access to iLab's support dashboard which provides help documentation, webinars, and access to the support portal to submit support tickets with Agilent (the system vendor)

Manage Your Research Group in iLab

Overview

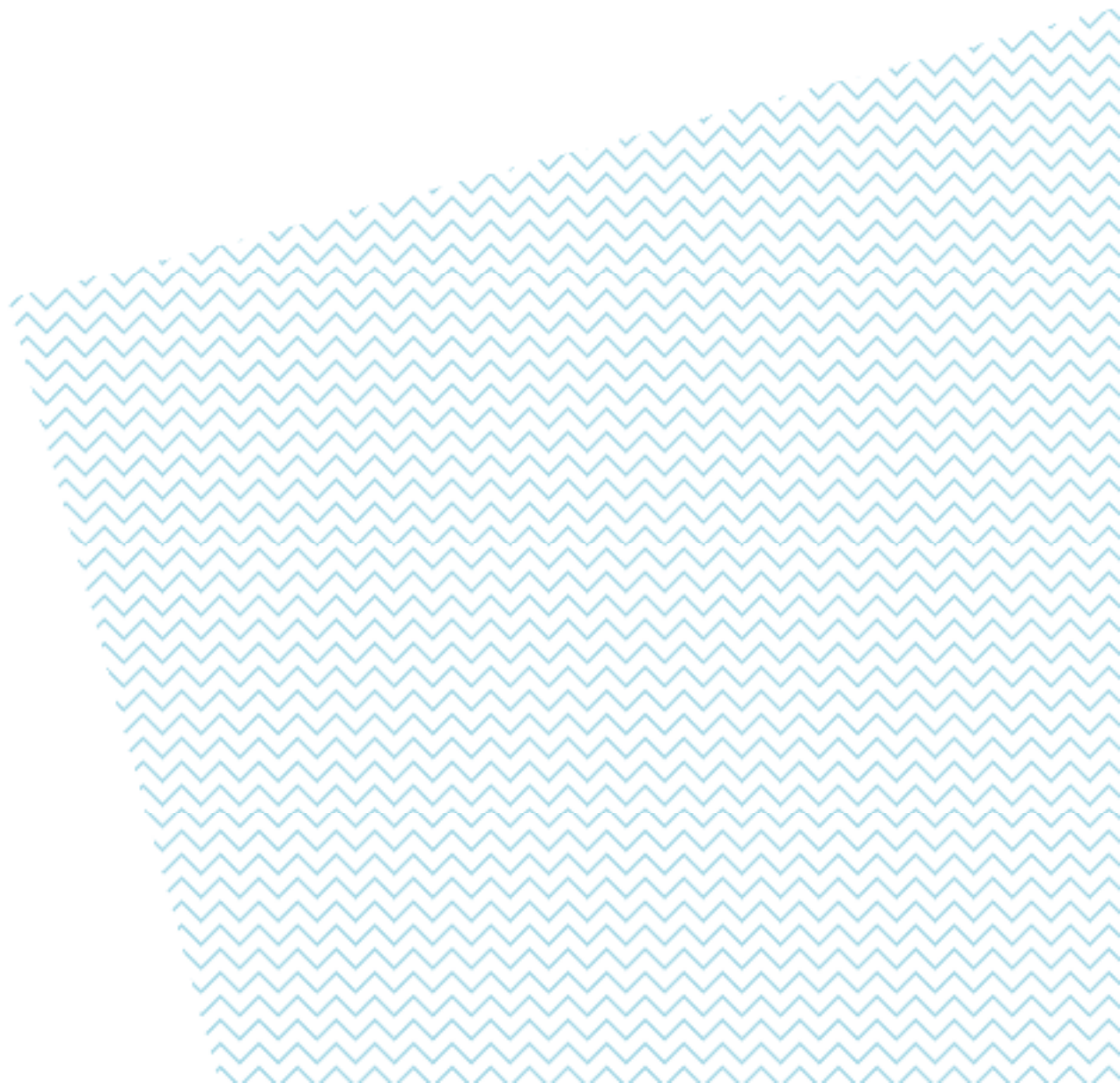
Adding New Lab Members

Assigning Lab Managers and Core Financial Contacts

Assigning Worktags to Lab Members

Adding New Worktags for your UoM Lab Group

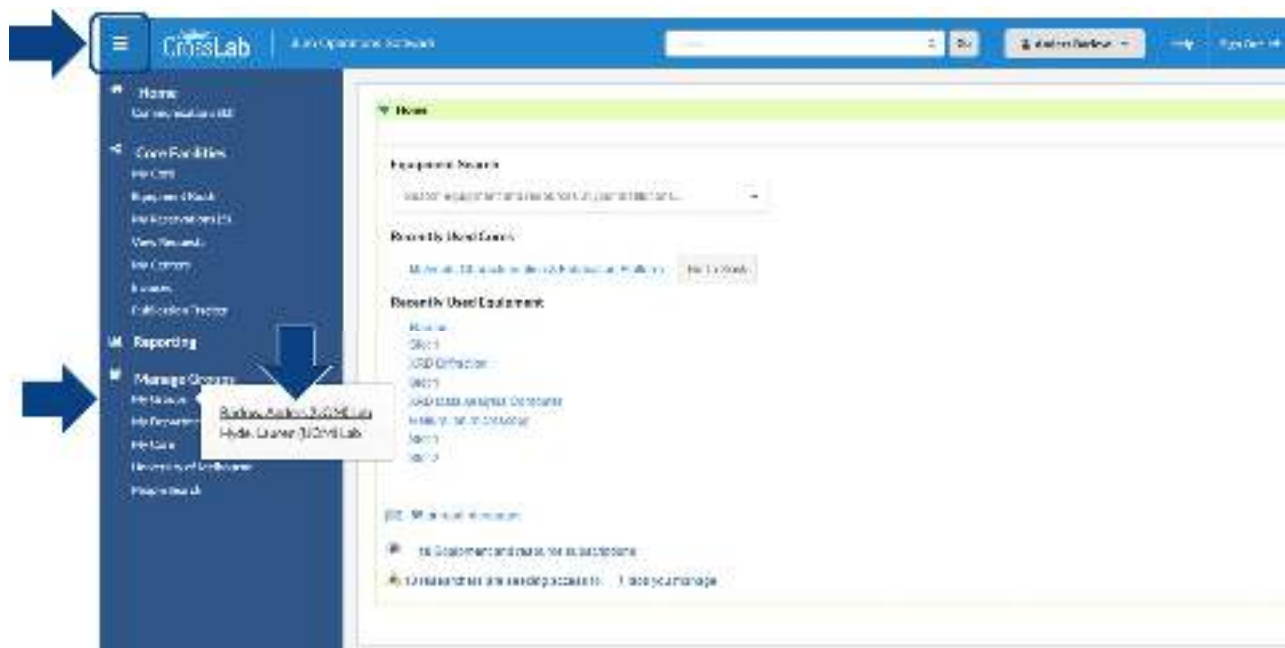
Hiding Unnecessary Worktags in your Lab Group



Overview

To access your Lab Group interface, first sign-in to iLab, then,

1. Locate the left-side pop-out menu by clicking on the top-left 'hamburger icon'
2. Hover over '**My Groups**' and click on your group name
 - a. Alternatively, you can click on '**My Groups**', then click on your group name in the new window



3. You will now see your lab group interface which will allow you to manage your group in iLab



- **Membership Requests & Worktags** – Here you will approve requests to add new members to your group and assign Worktags to your lab members. Note that a notification on this tab such as a number in a red shape indicates requests that require attention.
- **Members** – Manage your existing group members and assign roles such as 'lab manager' and 'financial contact', and link existing registered iLab users into your lab
- **Budgets** – Setup per-member or per-Core spending budgets, and set up alerts for spending thresholds
- **Bulletin Boards** – Communicate within your lab group
- **Group Settings** – Various settings including setting a lab group primary contact

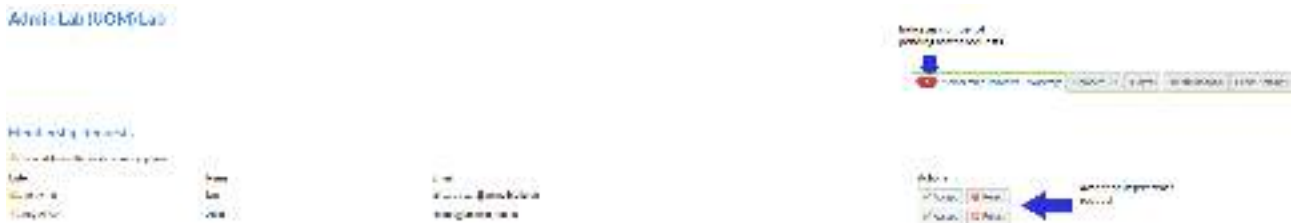
Adding New Lab Members

There are two ways for new members to be added to your lab group: via a request from the user, or by linking existing users into your lab directly.

Approving lab group access requests from users:

When you sign-in to iLab and navigate to your lab group, any pending access requests will be indicated in the 'Membership Requests & Worktags' tab and highlighted by a notification icon

1. Click on the '**Membership Requests & Worktags**' tab
2. Pending requests will appear under the Membership Requests section, to accept a member into your lab click the '**Accept**' button



Link existing users to your lab:

You can manually link an existing registered iLab user to your lab group

1. Click on the '**Members**' tab
2. Under the Lab members and settings section click on the '**Link Existing User**' button
3. Type the user's name into the search box that appears, the system will automatically search for the user, click on their name in the list that appears
 - a. Choose an appropriate role for the user: member, manager, or principal investigator
 - b. If you wish you may add start and end dates for the user
 - i. Start Date: The start date for the user as a member of the lab. If set in the future the user will not be associated with the lab until the start date. If empty, the user will be active immediately.
 - ii. End Date: The end date for the user as a member of the lab. After this date the user will be removed from the lab and will not be allowed to pay for services through the lab worktags. If empty, the membership will have an indefinite duration.
 - c. You can leave 'Can order?' unchecked
4. Click '**Invite**'

The user will now appear in your members list



Assigning Lab Managers, delegates and Core Financial Contacts

You may wish to delegate responsibility to a lab member by assigning them as a lab manager and/or financial contact

1. Click on the **'Members'** tab and locate the lab members section
2. Find the lab member you wish to delegate responsibility to and click the **'blue pencil icon'** to the right



3. On the new window that appears set the Permission to **'manager'**, this grants the user similar rights to the PI role, allowing them to approve new members and manage existing members
4. If you wish to also delegate communication to the lab manager, check the **'Core Financial Contact'** box, all iLab notifications for the Lab Group will be sent to this user
5. Click **'Save'**

4 Core Financial Contact will receive all email notifications about the lab

3 Manager has similar rights to the PI

5 Click Save

6. You will now see that the green '\$' symbol has moved to the assigned lab member and that their role icon has changed from blue to yellow, indicating they are now the Core Financial Contact and a Lab Manager (you may need to refresh your page to see these changes)

- Notes:
- i. You can have multiple Lab Managers
 - ii. There is only one Core Financial Contact

Lab members and settings

Active Members		Lapsed Members				
Name	Auto Approval Amount	Lab ID	Email	Phone	Start Date	Lab Date
Andrea Barlow	Lab default (\$5,000.00)		andrea.barlow@unimelb.edu.au	50259422		
Alexa Teare	Lab default (\$5,000.00)		alexa.teare@unimelb.edu.au	62445126		
Laura Hyde	Lab default (\$5,000.00)		laura.hyde@unimelb.edu.au	1224		

Annotations on the table:

- Core Financial Contact:** Points to the '\$' icon in the 'Lab Date' column of the first row.
- Lab Manager:** Points to the yellow role icon in the first row.
- Lab Member:** Points to the blue role icon in the first row.

If you delegate the Core Financial Contact to another lab member you as the PI will no longer receive notifications about your lab group, and the newly assigned lab manager will be able to approve new member and assign financial information.

Assigning Worktags to Lab Members

Any lab member from a UoM Lab Group must have an active worktag assigned to them in order to access Research Platform resources and services.

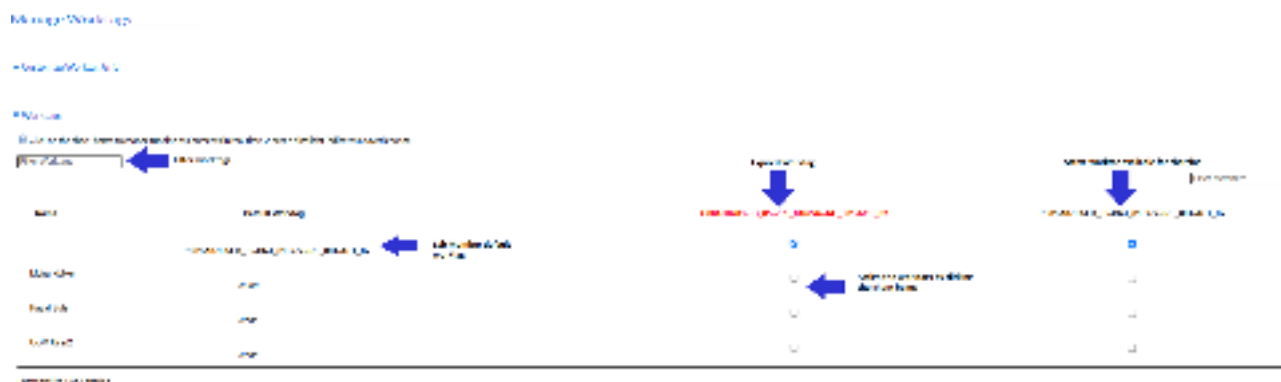
Lab members from External Lab Groups may be able to access Research Platform resources and services without assigned payment information, however some Platforms may require Purchase Order numbers.

Lab members from iLab-Integrated External Lab Groups should follow the requirements of their own institution.

To assign worktag(s) to lab members,

1. Click on the 'Membership Requests & Worktags' tab
2. In the Manage Worktags section you will find the 'Worktags grid' for your lab group

Note: For UoM PIs, worktags are automatically added to your lab group upon creation of the lab



3. To make a worktag available for a member to use, simply click the check box of the worktag in the row of the member you wish to assign it to, users can have multiple worktags assigned to them for use
4. To set a default worktag that will automatically be selected when the user accesses a Research Platform or facility or Lab, click the text in the Default worktag column for the lab member, you can then select a default worktag from the worktags that have been assigned
5. Worktag assignments are immediate, you do not need to 'save' them, recent changes are highlighted in green



Adding New Worktags for your UoM Lab Group

UoM PIs will automatically have a lab group created for them based on research project codes and this will determine the available worktags for an automatically generated lab group. There may be cases where a desired worktag has not been included in a lab group (such as operational funds, funds with a program instead of a project code), and these can be manually added by the UoM Admin.

To add a new worktag, please fill out the [UoM iLab ServiceNow request Form](#) and choose "Add an account string to a Lab Group". Note you will need to provide the name of your Finance Administrator/Department Manager in order to

process the addition request. If the worktag already exists in another Lab Group in iLab, the PI may be contacted for information.

Once the necessary approval is obtained, the UoM Admin will add the worktag and it will appear in your Worktags grid to be assigned to lab members.

Hiding Unnecessary Worktags in your Lab Group

You can hide worktags from your worktags grid so they cannot be assigned to lab members. The worktags can be disabled for the Lab Group so that you will maintain them as part of your lab group for future reference.

To disable worktags from your grid,

1. Click on the '**Membership Requests & Worktags**' tab and navigate to the bottom of the page where you will find the 'Disable/Enable Worktags' section (you may need to expand this section)
2. Find the worktag you wish to hide in the list, then uncheck the tick box before the worktag to disable it from the Lab Group.



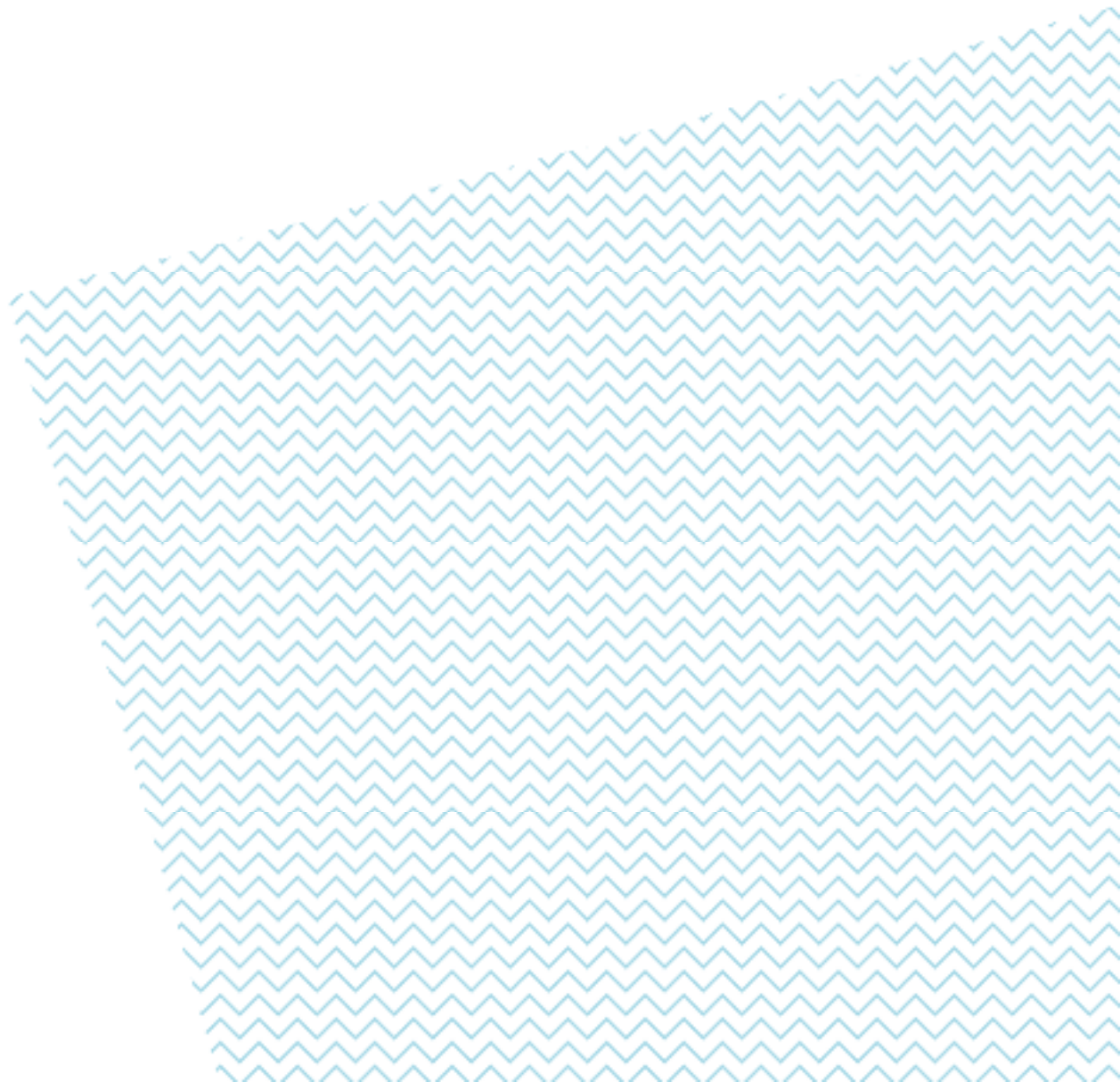
3. Reload the page and you will see that the worktag has been removed from your worktags grid
4. To add the worktag to the Lab Group again simply check the tick box and refresh the page.

Reporting

Building and Saving a New Report

Loading a Saved Report

Emailing, Exporting and Printing Your Report



Building and Saving a New Report

To access the Reporting interface, first sign-in to iLab, then,

1. Locate the left-side pop-out menu by clicking on the top-left 'hamburger icon'
2. Hover over 'Reporting' and under the heading Labs, click on 'Spending at all of my labs'



The reporting interface for labs that you manage will be shown



3. Select the appropriate report type from the tabs at the top-right of the interface
 - a. **Charges:** report on the financial charges generated by Platforms, e.g. quantity, price, type, etc.
 - b. **Requests:** report on Platform service requests, e.g. projected/actual cost, completion time, etc.
 - c. **Events:** report on Platform bookings, e.g. scheduled/actual time, scheduled/actual cost, etc.
4. Choose to either load the default report (a collection of pre-prepared report graphs and tables), load a saved report (that you have previously setup and saved), or to build a new report
Note: for this guide we will build a new report and save it to be loaded again
5. Click 'Build new' to create a new report, the Report settings dialog appears



You build your report by first setting the date range to capture data from, then specifying what date to use for each item in the report, then choosing the types of outputs for the reports (graphs, charts, tables etc.), and then running the report to generate the output.

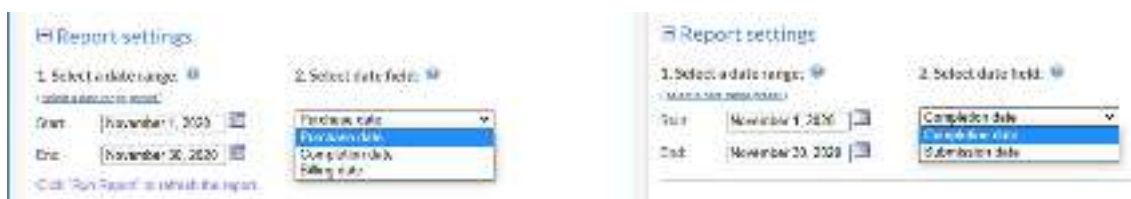
You can modify and re-run the report at any time.

6. Select a date range

You can use a pre-set date range by clicking the link and then choosing the appropriate pre-set, or you can manually type or select the start and end date for your desired report



7. Select the date to be used for items in the report



For a Charge reports:

- **Purchase date:** when the charge was created
- **Completion date:** when the work the charge is associated with was marked as completed
- **Billing date:** when the billing event the charge is included in was created

For Request reports:

- **Submission date:** when the request was submitted
- **Completion date:** when the request was marked as complete

8. Click the 'Charts and tables...' button



Initially a collection of outputs is prepopulated, to delete any you don't wish to use click the red cross.

To edit an output, click the yellow pencil icon, make your changes, then click the green tick icon.

You can configure your outputs using the following fields:

- **Chart type:** You can choose from stacked bar, line, stacked line, pie, and data table
- **Group by:** The first grouping applied to the data in the output. For example, select Core to first group charges or requests by the Core (Platform) at which they were incurred
- **Value to report on:** Choose the value to show in the report, for a Charge report this includes Total Cost, Average Cost and Quantity
- **Display data by:** Choose the time frame to consolidate data into (e.g. week, month, quarter etc.)
- **Also group by:** Apply a second grouping to the data, such as by Customer. This will create a sub-panel for the second grouping, up to a maximum of 10

To reorder the outputs, click and drag the green arrows on the left side.

To add a new output, click 'Add a new chart or table'.

Once you have configured your report, click 'Apply'. The report will be generated and immediately output for you to view. You can reconfigure your report at any point, so feel free to create new outputs one by one to learn how the system presents the reports to you.

9. View, edit and filter your report

Scroll down to view each panel of your report. As necessary you can update the report settings at the top of the page and click 'Run report!' to output the result with the new settings, or you can edit each panel individually by hovering over the panel and clicking the yellow pencil icon that appears.



Use the filter menu on the left side of the report to further restrict the output in the report. Expand a category in the filter list, select the fields you want to display (or not display), then click 'Apply Filters'.

10. Save your report template



Click 'Save...', give your report a name, then click the 'Save' button in the dialog. This will allow you to reload this saved report template later, including all set filters.

Note: the report will automatically save under the appropriate category, i.e. Charge, Request, etc., so you can save unique reports for each type. A single report cannot be used for either/both a Charge and Request report.

Loading a Saved Report

1. Click the 'Load saved' button in the reporting interface



2. Select the report you wish to load. Note that you need to load the report from the correct category, i.e. Charge, Request etc., a single report cannot be used for either/both a Charge and Request report.
3. Click 'Load' to display your report. You may now view, configure and export the report as previously.

Emailing, Exporting and Printing your Report

1. Build or load the desired report
2. To email the report results...

Click 'Email...' to send a copy of the report to a colleague. In the dialog window type in the recipient's email address. Edit the subject line if you wish.



Select the type of data file(s) to send the recipient:

- A PDF copy of what is seen displayed as the report
- CSV/Excel files of either the summarised data that makes the tables or charts in the report
- Raw source data used to generate the report
- All the above

Edit the message if you wish and choose whether to send a copy to yourself (this will go to the email address attached to your iLab account).

Click 'Send emails'.

3. To export the report results...

Hover over the 'Export...' button. You will be presented with four options:

- Export the charts and tables displayed in the report as a PDF file
- Export the data from charts and tables as either Excel or CSV files
- Export all the source data (not just what is shown in the report panels) in the report date range to a CSV file. This option is typically the most useful if you wish to analyse the full data sets in other applications (e.g. Excel).



4. To print the report results directly from your browser...

Click 'Print preview...' to display the report in a new browser window.



The report will be displayed in a simple format with only the relevant information and report panels shown for you to print directly from your browser.

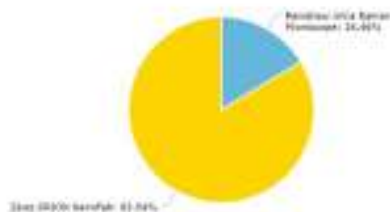
New Test Report

Charge reporting for November 1, 2020 to December 1, 2020 by purchase date

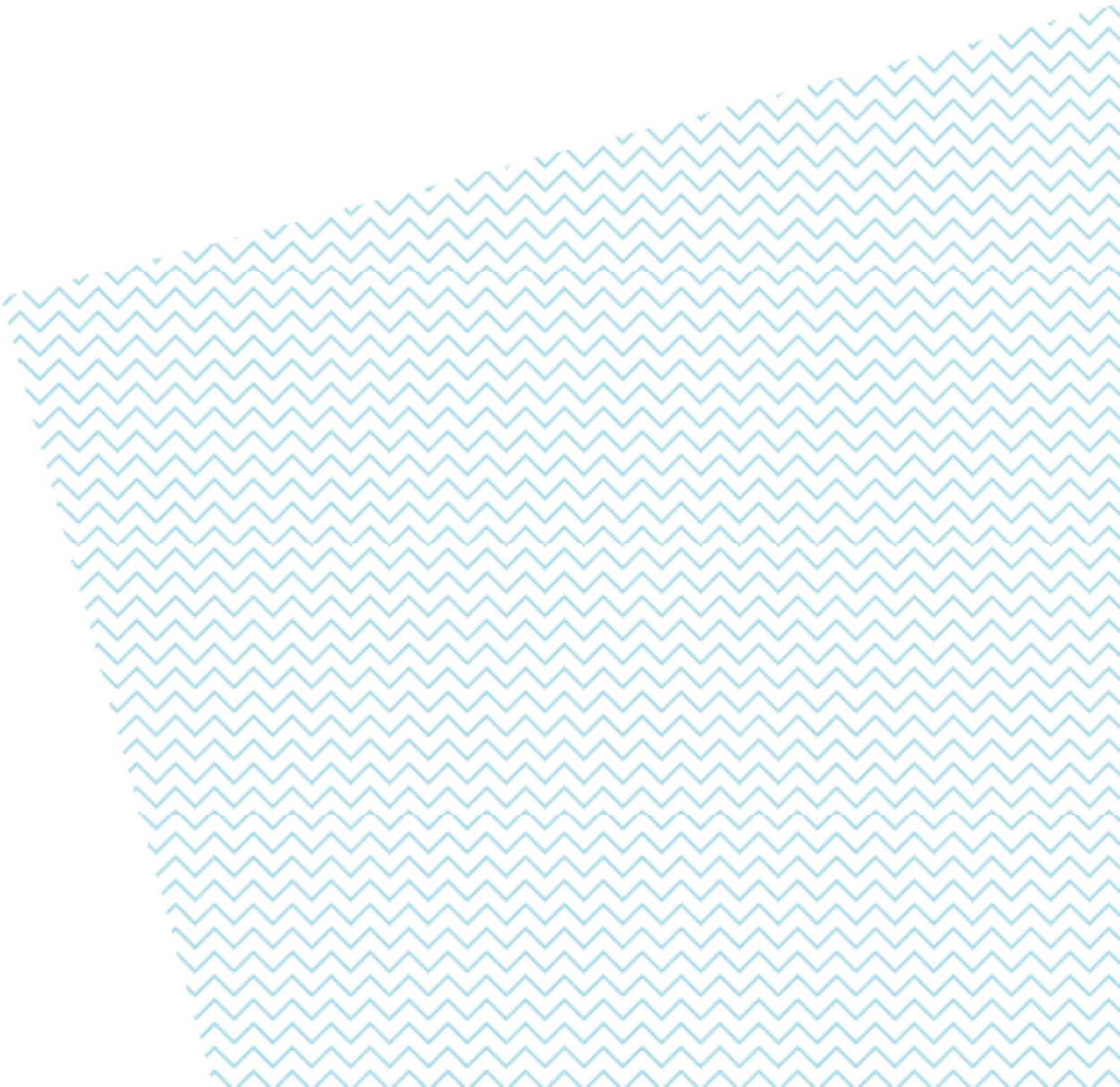
Cores by quarter (by total cost) for Anders Barlow

Core	Q4-2020	Total
Materials Characterisation & Fabrication Platform	\$880.75	\$880.75
Total	\$880.75	\$880.75

Services (by total cost) for Anders Barlow





iLab Interactive Invoicing



Interactive Invoicing

UoM iLab Platforms will perform billing on regular cycles. For internal users and PIs this billing is directly integrated with Workday and utilises the worktags assigned to your lab members to make the transfers. Upon creation of a billing event in iLab, Platform Managers may reach out to you to view upcoming invoices inside the system. These iLab invoices (not to be confused with invoices from Workday) are interactive, and allow you to view all of the details associated with the accrued charges, and also to fix possible billing errors such as missing payment information, or to reassign Worktags prior to the data being submitted to Workday.

You can find more information about invoices on the iLab Help Site [here](#).

1. You will usually access iLab invoices from one of two locations: in the left-hand pull out menu via the link "Invoices", or via a link that has been emailed directly to you
2. Invoices will all have the same general structure regardless of the Core. Charges will be collated together based on Users and Requests, and any line that requires attention will be marked with a red arrow 
3. Click the **magnifying glass** to view the details in the booking system, click the **dollar icon** make changes to the payment information, if the dollar icon has an exclamation mark it requires attention 





Dr Elena Taran
Platform Manager
+61 3 834 40176
elena.taran@unimelb.edu.au

Invoice No. **MCFP-**
Invoice Date: **April 29, 2021**
Lab

From: Materials Characterisation & Fabrication Platform To:

[show additional contacts](#)

Invoice Total							\$200.00
Invoice Details							
DATE	ITEM DESCRIPTION	PMT.#	QTY	PPU	STATUS	TOTAL	
▼ Request: MC&FP- Start: April 28, 2021 Owner:							
April 22, 2021	Nikon A1R+ Confocal Microscope (Nikon A1R+ Confocal Microscope) Thursday, April 22		4.0	\$25.00/hr	Completed	\$100.00 	
April 23, 2021	Nikon A1R+ Confocal Microscope (Nikon A1R+ Confocal Microscope) Friday, April 23		4.0	\$25.00/hr	Completed	\$100.00 	
Invoice cost: \$200.00							
Invoice Total							\$200.00

4. Make the required changes to the payment information, such as updating the worktag to be used for the charges
 - a. Note that only worktags that are currently active in your lab group and assigned to the user that generated the charge can be used for payment
5. Click 'Save'

Payment Information

Charge	Billing Status	Worktag	Amount	Tax	Total
Zeiss LSM 780 NLO - Trained and Untrained (Instance 1) Wednesday, May 07	Billing Initialized	C001-10392-FD_05-PRJ_007089-- RE_001-ACT_02	\$70.00	\$0.00	\$70.00

Selected charge(s) total with tax: \$0.00

Invoice total: \$70.00

Update payment info for selected (1) charges

Worktags: 100.0% C001-10392-FD_05-PRJ_007089--RE_001-ACT_02 - PRJ_007089 - B4 C

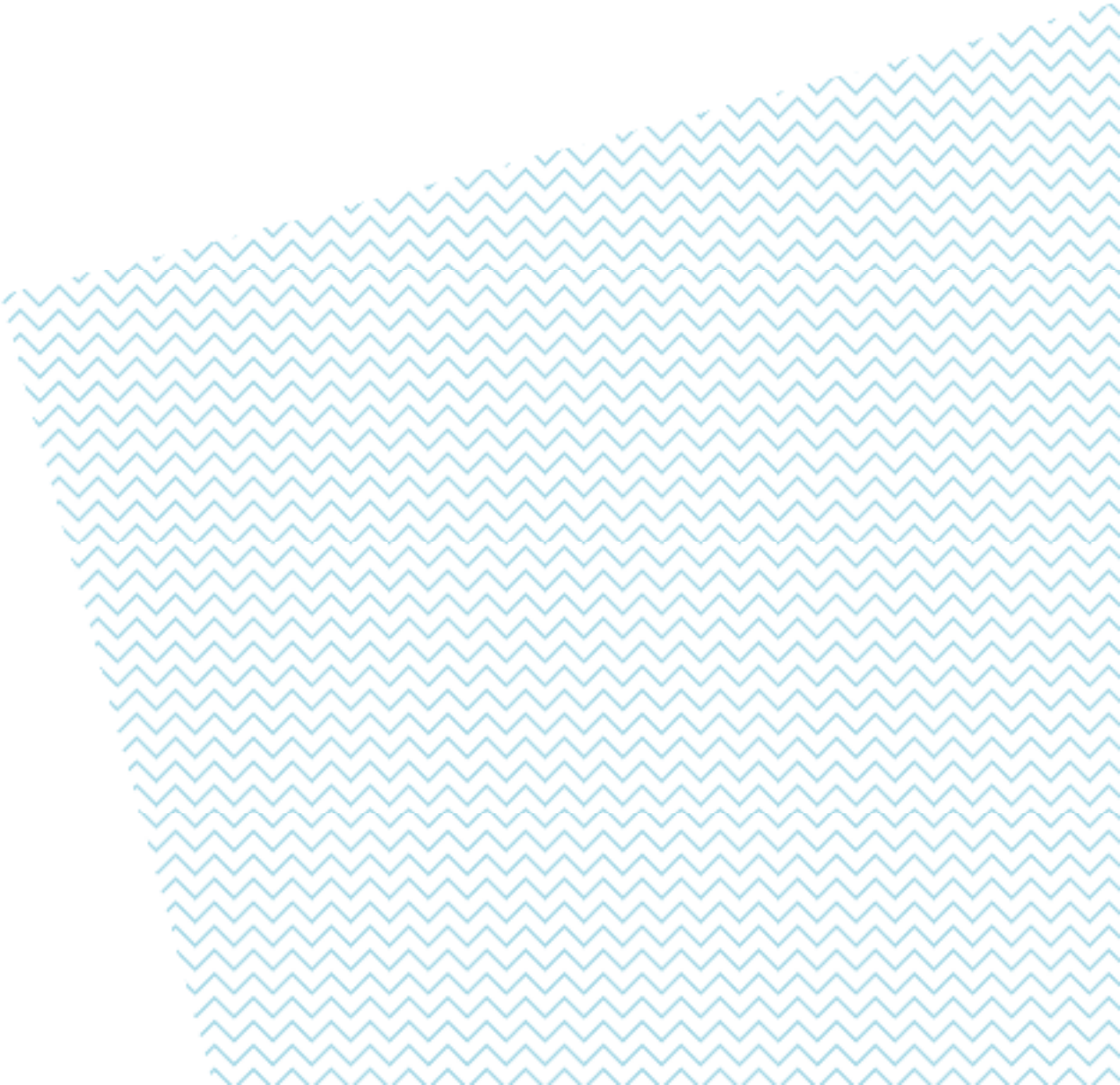
Total Allocated: 100.0%

Default to this payment method

payment notes

save cancel

Support



Support

For UoM SSO login issues, UoM researchers should fill out the [UoM iLab ServiceNow Request Form](#) and choose “Report a login or registration issue”

For worktag issues, UoM researchers should fill out the [UoM iLab ServiceNow Request Form](#) and choose “Add an account string to a Lab Group”

For any other issues, UoM researchers should fill out the [UoM iLab ServiceNow Request Form](#) and choose “Other”

For any resource, service or platform-specific support, your first contact should be with the platform management staff. Contact information for the platform will generally be included on the core’s ‘About’ tab.

For support with financial payment information PIs should contact their Finance Administrator or Department Manager.

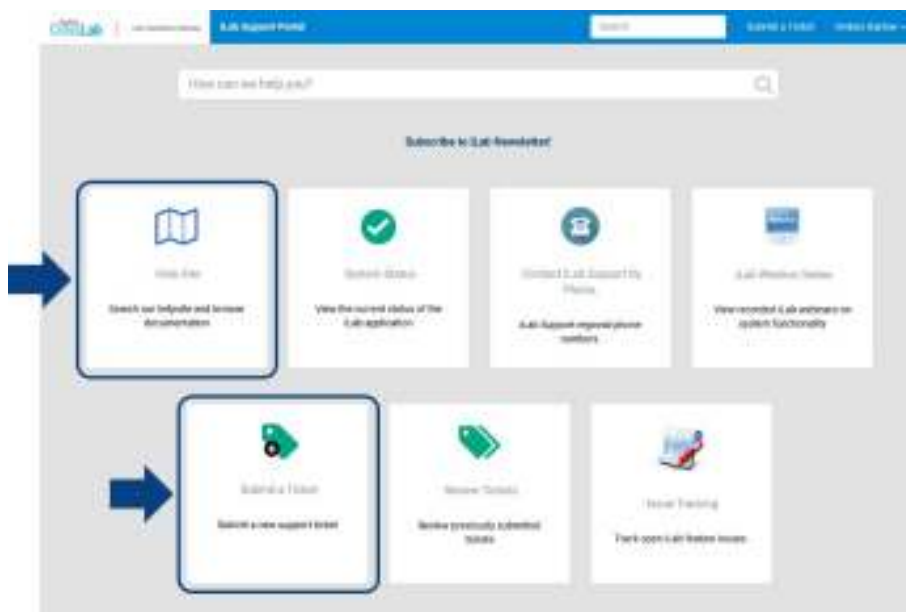
For simple or general iLab support and “How do I...?” type questions, talk to platform support staff who will be able to assist you with frequently asked questions.

For more in-depth iLab support read through the Help documentation on [Managing a Group](#)

Access the iLab Support Portal



From any core page you will be able to access the iLab Help Portal by clicking the ‘Help’ button in the top-right of the page. This will open the portal in a new window.



In the iLab support portal you can view the Help Site, which provides comprehensive documentation on the operation of iLab from an end-user perspective (see Using a Core).

Here you can submit a support ticket to Agilent for help with technical issues that could not be resolved locally. **Please exhaust local support first before contacting Agilent for support as many issues will likely either be known about or have solutions already that local support can resolve.**

