Implementation Experience:

Scheduling and Managing Permissions Manual

Overview

Welcome to the iLab Family! We are excited to have the opportunity to work with you and are eager to ensure your implementation experience runs smoothly. This manual includes materials and instructions to help supplement your iLab implementation experience.

Implementation Experience Contact

Your Onboarding Manager is your contact during this initial phase of training. As we collaborate on this implementation, please email your Onboarding Manager with questions, issues, concerns, or updates you have for your site.

Additional Resources

Additional resources can be found on the iLab Help Site. You can watch our editing Webinars at any time during or after implementation!

iLab Registration & Login Guide

As a Service Center Manager or Staff Member, you will need access to iLab to continue your implementation meetings and to use and view your site.

- **Login**
  - Your Onboarding Manager will send an email with your direct link and registration instructions.

If you are unsure which link to use, the **iLab Access Guide Widget** is available to assist you. This tool guides users to the correct iLab landing page based on their institution's requirements. Simply follow the predefined questions, and the widget will direct you to the appropriate signup or login page.

Testing Instructions

- The training phase of your iLab Implementation is critical. During these sessions, you will collaborate with your iLab Onboarding Manager to understand your site's workflow and capabilities.

- Testing is essential for a successful go-live launch. It builds confidence and comfort with iLab and allows you to identify any workflow issues with your current setup.

Your Onboarding Manager will provide you with login credentials for a Test User to view and navigate the system from the **customer's perspective**.

To comprehensively learn and test all parts of your core's site content and workflow, please follow the steps outlined below. Login with the Test User account to see the site from the **customer perspective.** Then logout and follow the instructions to login with your own account for the **site admin experience**.

- **Quick tip: Login to a browser as yourself and another browser or open an incognito window to login as your Test User. This will help you quickly walk through the workflow of each perspective.**

Scheduling Testing

Equipment & reservation workflow testing:

1. *Login* as the ***Test User*** *your Onboarding Manager provided.*
2. Click the *Schedule Equipment* tab.
3. Click on *View Schedule* of one of the calendars.

4. Click and drag for a selected amount of time on the calendar.
5. Select your availability from the drop-down menu.
6. Click *Save Reservation.*
   a. Note: if your calendars have varying price levels or trained user requirements consider making a reservation that meets each scenario.
7. *Logout* as ***Test User*** and *login* with **your own credentials** and reload your site URL.
8. Click the *Schedule Equipment* tab, then click *View Schedule* for the instrument the reservation was made on.
9. If any of the newly created events require core approval, you will see reservations in orange *Waiting for core approval*.
10. Double click on the orange reservation. This will open the reservation details.
11. Review the details of their reservation. If all looks correct, click *Save & Approve*.

You can read more in Overview of Schedule Equipment on our Help Site.

Managing Permissions

Managing Permissions/Training in the calendar settings:

1. *Login* with **your iLab credentials.**
2. Click the *Schedule Equipment* tab.
3. Click on the *blue edit pencil* to the right of the appropriate calendar.
4. In the left-hand *Settings* menu, select the *Permissions* section.
5. Search for the user or group (“last name, first name” for labs, “first name last name” for user).
6. Click the *blue add button* to the right.

Managing Permissions/Training on the People tab:

1. *Login* with **your iLab credentials**
2. Navigate to your site and click on the *People* tab.
3. Select the *checkboxes* to the right for any users you would like to adjust Training.
4. Select the *<< Bulk Actions* button.
5. Click *Manage Equipment Permissions*
6. Switch the *Current Status* dropdown to *Trained*
7. Click the *checkbox* on the appropriate instruments to mark the user as trained (alternately, you can use the *green check mark* icon or *red X* icon to update training status across the user or instrument).
8. Click the *blue Save button* to the right.

You can read more in Permissions in the Editing Interface and Managing Permissions on the People tab on our Help Site.