iLab Solutions:
Core Facility Management Solution

February 18, 2015
iLab provides web-based core facility management software to academic research institutions

Who is iLab?

• Founded in 2006 by academic researchers
• 50+ staff across Europe and North America supporting 1,000+ cores
• iLab focuses on academic research management, working with universities and nonprofit research institutions

What does iLab do?

• iLab offers web-based tools for core facilities that streamline daily operations
• iLab supports a broad variety of cores, offering equipment scheduling, hardware interlock, project management, inventory tracking, sample management, billing and reporting
iLab offers a comprehensive suite of services necessary to achieve adoption and sustain usage

**Hosting & Maintenance**
- Proven, scalable infrastructure
- No customer set-up required
- 7+ year track record of security and data integrity
- Redundant data backup

**Software**
- Robust suite
- Agile (bi-weekly) release of enhancements
- Custom development available

**Implementation**
- Proven processes and methodology
- Specialized Configuration for each core
- Wide breadth of integration experience

**Support**
- Unlimited support for all users
- Fully staffed support desk
- Phone
- Email
- Chat

**Complete Solution**

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Streamlines the management of shared research resources

**Manage Facility Details**
- Cores can provide a description of resources, availability, usage rules, forms, pricing, etc.
- Institution can set additional guidelines

**Search**
- Researchers can browse or search by keyword for available resources
- Researchers can explore possible facilities to determine best fit

**Request**
- Researchers can request services or submit project summaries
- Researchers can reserve time on equipment

**Manage Project Workflow**
- Facility staff can develop project plans
- Facility staff can track/update project progress
- Facility can track usage of equipment

**Bill/Invoice**
- Facility or administrators can charge for services (various options depend on customer type, including invoices, cost transfers, etc.)

**Report**
- Managers can create reports analysing usage patterns within and across facilities

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iLab/CORES is the global leader in core management software, supporting 1,000+ Facilities at 110 Institutions in 10 Countries
iLab and C.O.R.E.S. Work with 30 NCI-Designated Cancer Centers

- Barbara Ann Karmanos Cancer Institute (Wayne State)
- City of Hope Comprehensive Cancer Center
- Cold Spring Harbor Laboratory Cancer Center
- Dan L. Duncan Cancer Center (Baylor College of Medicine)
- Dana-Farber Cancer Institute
- David H. Koch Institute for Integrative Cancer Research at MIT
- Fred Hutchinson Cancer Research Center
- Herbert Irving Comprehensive Cancer Center (Columbia University)
- Hollings Cancer Center (Medical University of South Carolina)
- Indiana University Melvin and Bren Simon Cancer Center
- Jonsson Comprehensive Cancer Center (UCLA)
- Knight Cancer Institute (Oregon Health & Science University)
- Massey Cancer Center (Virginia Commonwealth)
- Mayo Clinic Cancer Center
- Memorial Sloan-Kettering Cancer Center
- Sidney Kimmel Comprehensive Cancer Center (Johns Hopkins University)
- Stanford Cancer Institute
- Sanford-Burnham Medical Research Institute
- Trinity College Dublin
- UCSF Helen Diller Family Comprehensive Cancer Institute
- University of Colorado Cancer Center
- University of Kansas Cancer Center
- University of Michigan Comprehensive Cancer Center
- University of New Mexico Cancer Research & Treatment Center
- University of Pittsburgh Cancer Institute
- USC Norris Comprehensive Cancer Center
- UVA Cancer Center
- Vanderbilt-Ingram Cancer Center

* = Contract negotiation
= iLab Customers
= C.O.R.E.S. Customers
Advantages for Multi-Campus Institutions

- Increase oversight of shared resources across campuses
- Reveal inefficiencies and opportunities for consolidation or expansion
Saves time for cores and reduces required subsidies

**Revenue from Services Delivered**
- % of total core budget
- **No System**: 45%
- **Electronic System**: 50%
- **11% increase**

**Institutional Subsidies**
- % of total core budget
- **No System**: 37%
- **Electronic System**: 30%
- **19% decrease**

**User Satisfaction**
- % of respondents
- **Dissatisfied**: No System 23, Electronic System 8, iLab System 16
- **Neutral**: No System 34, Electronic System 26, iLab System 82
- **Satisfied**: No System 43, Electronic System 66, iLab System 16

**Time for Core Managers on Admin Tasks**
- Hours per Month
- **Managing Requests**: Without 18, With 12
- **Billing/Invoicing**: Without 11, With 7
- **Generating Reports**: Without 11, With 7
- **Managing Inventory**: Without 10, With 6
- **Managing Budgets**: Without 88, With 9
- **Marketing**: Without 3, With 3
- **36% less time**

Source: 2012, 2013 Core Facility Benchmarking Survey; iLab user surveys
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Implementation
**Individual Core Implementation Schedule**

**Implementation**

- **Kick-off**
  - Explain iLab system to Cores
  - Set expectations for implementation
  - Provide information gathering template

- **Info gathering**
  - Understand current core workflow
  - Review gathered information
  - Schedule biweekly meetings
  - Address any questions

- **Core review**
  - Demonstrate modeled functionality
  - Gather feedback on further changes (distinguish must-haves / need-to-haves)

- **Training 1**
  - Provide login credentials
  - Initial training on iLab workflow
  - Review manual and other available resources

- **Core tests and learns iLab**
  - Further training on iLab system
  - Tweak configuration as necessary

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- **iLab provides support**

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**8 weeks***

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**10 - 14 weeks***

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* Assuming core is responsive and engaged

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Screenshots
Search for resources

Search Service Centers, Services & Equipment

Search for [microscope]  Go  Reset

Service Centers (9 result(s) matched "microscope")

<table>
<thead>
<tr>
<th>Core Facility</th>
<th>Molecular Cytogenetics Core</th>
<th>Molecular Cytogenetics Core</th>
<th>Mouse Genetics Core - Transgenic Core</th>
<th>Research University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td>Contact</td>
<td>Contact</td>
<td>Contact</td>
<td>Contact</td>
</tr>
<tr>
<td>Core Manager</td>
<td>Margaret Leversha</td>
<td>John Smythe</td>
<td>NGTC Manager</td>
<td>SRI Genomics</td>
</tr>
<tr>
<td><a href="mailto:CoreManager@lab.com">CoreManager@lab.com</a></td>
<td><a href="mailto:leversha@mekcc.org">leversha@mekcc.org</a></td>
<td><a href="mailto:smythe@university.edu">smythe@university.edu</a></td>
<td>core.manager@notre dame.org</td>
<td><a href="mailto:sri.genomics@itlsolutions.com">sri.genomics@itlsolutions.com</a></td>
</tr>
</tbody>
</table>

Services & Equipment (14 result(s) matched "microscope")

<table>
<thead>
<tr>
<th>Service</th>
<th>Equipment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microscope Training</td>
<td></td>
</tr>
<tr>
<td>Scheduling and Complex Projects Core</td>
<td></td>
</tr>
<tr>
<td>Demo University</td>
<td></td>
</tr>
<tr>
<td>from Complex Projects &amp; Quote Requests</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Inquire</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go to core</td>
</tr>
</tbody>
</table>

Confocal Microscope Training Request

| University College London |
| from Project Requests and Instrument Training |

<table>
<thead>
<tr>
<th>Inquire</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go to core</td>
</tr>
</tbody>
</table>

Training Request for Inverted Compound Microscope

| Molecular Cytogenetics Core |
| The Broad Institute (Demo) |
| Users cannot access the Inverted Compound Microscope until they have been trained. |
| from Request a Service |

Microscope

| Molecular Cytogenetics Core | Electronic reference material |
| MSECCE |

<table>
<thead>
<tr>
<th>Inquire</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0.00/hr</td>
</tr>
</tbody>
</table>

| view schedule |

© iLab Solutions 2006-2012
Molecular Cytogenetics Core

Overview of Services

This core provides comprehensive support for the cytogenetic analysis of cells from human and research animal sources. A wide range of chromosome analysis techniques are available, ranging from basic G-banded karyotyping, to 24-color Spectral Karyotyping (SKY), as well as Fluorescence in situ Hybridization (FISH) mapping of cloned DNA.

- Services Include:
  - Cytogenetic characterization of new cell lines
  - Karyotype confirmation of cell line identity or chromosomal stability
  - Karyotype screening of ES cells prior to transgenesis
  - FISH with customized probes
  - FISH mapping of transgene integration sites
  - Tissue FISH (paraffin or frozen sections)
  - Immuno-FISH (DNA FISH combined with fluorescent immunostaining)
  - Spectral karyotyping (SKY)
  - Chromosome or locus copy number enumeration

The core head will consult on individual projects with investigators. We provide advice on the appropriate type of materials required and the techniques for achieving the most effective outcome. We can help with specialized staining and FISH techniques not listed above.

Core Facility Management

John Smyth, PhD, Core Head
Gabriela Gómez, MSc, CLS(CG), Supervisor

Getting Started

- Consultation: prior to any work commencing with Flow Cytometry Core, we recommend you schedule a consultation with the Core Director. See below for contact info.
- Sign up for a new account using the link in the upper right hand corner, or paste this URL into your browser:
- Login with your approved credentials in the upper right hand corner
- Forgot your password? Request a password reset by pasting this URL into your browser:
  - http://demonstrations.illabsolutions.com/reset_password/
- Visit the Customer Help Manual for further guidance using iLab’s Core Facility Services:
  - https://docs.google.com/Doc?docid=4myIJJZms64dCZq2rGZ5w25tFIMJ1zc2ZxHrmdHwMbh-rHi3AtbZxyv-vCvz2HIMJ

Announcements

April 30, 2012

After Hours Self-Run Sorting

Call the Core and schedule a time for after hours run.

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## Dana Wong (Demo) Lab

### Membership Requests
- No Access Requests require approval

<table>
<thead>
<tr>
<th>Membership Requests &amp; Cost Centers &amp; Fund Numbers</th>
<th>Members (9)</th>
<th>Budgets</th>
<th>Assets</th>
<th>Bulletin board (3)</th>
<th>Group Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Membership Requests</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Manage Cost Centers & Fund Numbers

<table>
<thead>
<tr>
<th></th>
<th>99999 55555</th>
<th>99999 77777</th>
<th>99999 08080</th>
<th>99999 99999</th>
<th>99999 44444</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maria Garcia</td>
<td>✔</td>
<td></td>
<td></td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Dana Wong</td>
<td></td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>iLab Administrator</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Amanda Chen</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dean Lindstrom</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Marshall Marsh</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Page Zu</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rebekah Mesker</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[save] [cancel]
## Apply Assign Payment Numbers to Requests

### Reservation

**Reservation Details**
- **Unsaved reservation - please click save reservation.**
- **Call Sorter - My Reservation**

**Availability Type:** Operating Hours $25.00/hr

<table>
<thead>
<tr>
<th>start</th>
<th>end</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 08, 2013 02:30 PM</td>
<td>March 08, 2013 04:30 PM</td>
</tr>
</tbody>
</table>

**MFK Number**
- 123-45-6789-01234-5-6789012-3456-789-01234-56-7890
- 123-45-6789-01234-5-6789012-3456-789-01234-56-7890
- 123-04-5678-99876-5-0321001-2345-678-99876-54-3210

**Invite additional people to this event by email:**
Please enter a comma separated list of valid email addresses

**Save Reservation**  **Cancel Changes**

### Single Service or Project Request

**2) Cost**

The core will review and update this projected cost. You will only be billed for completed work.

**Total Projected Cost:**
94.00

**3) Payment Information**

Please enter the MFK Number

**MFK Number**
- 123-45-6789-01234-5-6789012-3456-789-01234-56-7890
- 123-45-6789-01234-5-6789012-3456-789-01234-56-7890
- 123-04-5678-99876-5-0321001-2345-678-99876-54-3210
Reserving Equipment

Confocal microscope (Molecular Cytogenetics Core)

To schedule a time, click and drag on the calendar.

(This calendar is in Eastern Time (US & Canada))
# Tracking a complex project

## Forms and Request Details

<table>
<thead>
<tr>
<th>View Form:</th>
<th>Karyotyping Request Form</th>
</tr>
</thead>
</table>

### Samples Shipped

<table>
<thead>
<tr>
<th>Description</th>
<th>Note</th>
<th>Quantity</th>
<th>Cost</th>
<th>Billing Status</th>
<th>Work Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harvest &amp; Karyotype, complex</td>
<td></td>
<td>2.0</td>
<td>$550.00 (527.00)</td>
<td>Not Ready To Bill</td>
<td>Proposed</td>
</tr>
<tr>
<td>Clinician Time</td>
<td>Time</td>
<td>2.0</td>
<td>$200.00 (130.00)</td>
<td>Not Ready To Bill</td>
<td>Proposed</td>
</tr>
<tr>
<td>Technician Time</td>
<td>Time</td>
<td>3.0</td>
<td>$50.00 (30.00)</td>
<td>Not Ready To Bill</td>
<td>Proposed</td>
</tr>
</tbody>
</table>

### Samples Rec'd

<table>
<thead>
<tr>
<th>Description</th>
<th>Note</th>
<th>Quantity</th>
<th>Cost</th>
<th>Billing Status</th>
<th>Work Status</th>
</tr>
</thead>
</table>

### Samples Processed

<table>
<thead>
<tr>
<th>Description</th>
<th>Note</th>
<th>Quantity</th>
<th>Cost</th>
<th>Billing Status</th>
<th>Work Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>(charge) shipping</td>
<td></td>
<td>1.0</td>
<td>$100.00</td>
<td>Not Ready To Bill</td>
<td>Proposed</td>
</tr>
</tbody>
</table>

### Data Processed

- **Dana:** 2 instances

### Comments

- Service Request History
- Billing Information
- Shipping Information
Core Billing & Invoicing

Creating Billing Event with the Ability to Update Assigned Payment Numbers

After reviewing charges, core managers click a button to send to ERP. iLab would gather all charges from all cores and queue them to be sent that night.
# Sample Invoice

**iLab Solutions**

**Save money. Save time. Accelerate research.**

**Address:** Molecular Cytogenetics Core

**Mail Address:**

**Phone:**

**Email:**

**Fax:**

**City:**

**State:**

**Zip Code:**

---

**To:** Dana Wong Lab

**Phone:**

**Fax:**

**Email:**

**Address:**

---

## Invoice Details

<table>
<thead>
<tr>
<th>Dates</th>
<th>Item Description</th>
<th>Hrs</th>
<th>Qt.</th>
<th>Rate ($/h)</th>
<th>Status</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 6, 2013</td>
<td>Technician Time</td>
<td>0.5</td>
<td>1</td>
<td>320.00</td>
<td>Completed</td>
<td>640.00</td>
</tr>
</tbody>
</table>

**Invoice Total:** $795.00
Invoicing with the Ability to Update Assigned Payment Numbers (Optional):

Note: This is beneficial if you want PIs/Finance to approve charges before billing against ERP or if you want to use iLab invoices as statements.
Reporting

Charge reporting for January 01, 2012 to July 31, 2012 by billed date

Cores by week (by total money)

<table>
<thead>
<tr>
<th>Week</th>
<th>Core</th>
<th>2011-12-26</th>
<th>2012-01-02</th>
<th>2012-01-09</th>
<th>2012-01-16</th>
<th>2012-01-23</th>
<th>2012-01-30</th>
<th>2012-02-06</th>
<th>2012-02-13</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Core</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Flow</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Cytometry</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Core</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Demonstration</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Core</td>
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<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>The Geomeres</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Lab total money: Yan, Emerald (GLA) Lab
Percentage: 46.63%
Value: $24,857.16