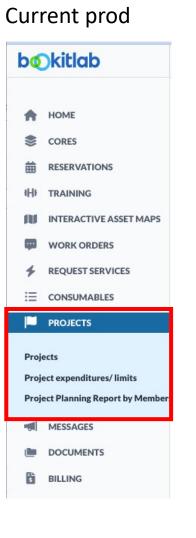
BookitLab v.39 Quick walkthrough of changes

IT-dep, Jarle Ebeling, Naoe Tatara

Project admin Moved main/submenu items: PROJECTS



New menu structure

DASHBOARD

INSTRUMENTS

RESERVATIONS

WORK ORDERS

CONSUMABLES

REPORTS

MESSAGES

BILLING

Projects

Charges

REQUEST SERVICES

INTERACTIVE ASSET MAPS

TRAINING

CORES

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PROJECTS main menu is no longer used. Instead, sub menu items under the current PROJECTS menu are moved to other places:

- Projects
 - under BILLING main menu
- Project expenditures/limits
- Project Planning Report by Members
 - REPORTS, Canned Report (next page)

Project admin Moved main/submenu items: PROJECTS (cont.)

Current prod

bø	b©kitlab				
Ħ	HOME				
۲	CORES				
蔮	RESERVATIONS				
ŧHŧ	TRAINING				
IU	INTERACTIVE ASSET MAPS				
P	WORK ORDERS				
4	REQUEST SERVICES				
≣	CONSUMABLES				
	PROJECTS				
Proj	ects				
Proj	ect expenditures/ limits				
Proj	ect Planning Report by Member				
-	MESSAGES				
	DOCUMENTS				
5	BILLING				

New menu structure

bookitlab

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kitlab	≡ 🅢 UiO ∶Universitetet i Oslo	Enter an asset name or asset attribute
DASHBOARD	Canned Reports a	
CORES		
INSTRUMENTS	Search Q	
RESERVATIONS	Category	Link
TRAINING	Projects	Project expenditures/ limits 🗹
INTERACTIVE ASSET MAPS	Projects	Project Planning Report by Members 🖸
WORK ORDERS	User Occupancy	Reservation Occupancy Report By Date 🖸
REQUEST SERVICES	User Occupancy	Reservation Occupancy Report By Position 🗹
CONSUMABLES	Reservations	Reservation Unique Users Report 🗹
REPORTS	User Occupancy	User/Instrument Resevation Occupancy Report 🗹
ned Reports	User Occupancy	Users onsite report (by Reservations)
MESSAGES	Rows per Page 10 🔻	

h BILLING

Canned Reports

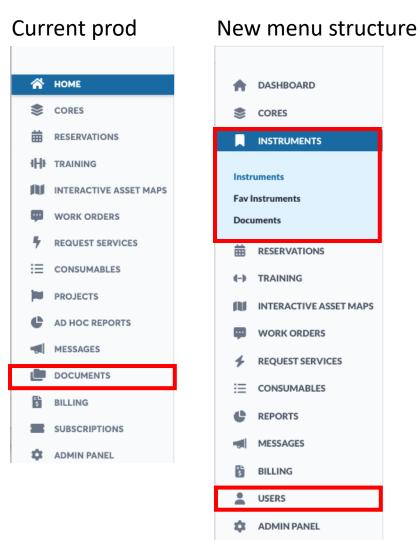
Project admin Project: End date per user

PROJECT ALLOWE	ROJECT ALLOWED USERS ()									
Allow all project user group	Allow all project user group members to use this project () Show not active user									
USER NAME	STATUS	USER LIMIT	WORK PACKAGE	COST CENTER ()	END DATE	USER	ORG UNIT	EMAIL	MOBILE	FACULTY
	Approved V						IMBØKSEK@uio.no	demo@prog4biz.com		

In the project page, end date can be set per user.

When the project's end date is earlier than the user's end date, the project's end date takes effect.

Core admin: Moved main/sub menu items INSTRUMENTS, DOCUMENTS, USERS



- INSTRUMENTS and USERS menu are available from home (no need to go to ADMIN PANEL)
- DOCUMENTS is moved under the All Instruments/ Assets (so it will be under Fav Instruments.

Core admin: Moved main/sub menu items **SUBSCRIPTIONS**

New menu structure

Current prod

- A HOME
- RESERVATIONS
- INTERACTIVE ASSET MAPS
- WORK ORDERS
- ✤ REQUEST SERVICES
- PROJECTS
- AD HOC REPORTS
- MESSAGES
- DOCUMENTS
- BILLING
- SUBSCRIPTIONS
- Subscriptions
- **Core Subscribers**

.

- DASHBOARD ۰ CORES INSTRUMENTS RESERVATIONS I TRAINING INTERACTIVE ASSET MAPS WORK ORDERS REQUEST SERVICES CONSUMABLES REPORTS MESSAGES BILLING Projects **Billing Preview** Charges Invoice Batches Billing Pricing Subscriptions Subscribers
 - •

- Sub-menus under SUBSCRIPTIONS are moved under BILLING
- «Core Subscribers» got a new name «Subscribers»

Core admin: Moved main/sub menu items **CONSUMABLES**

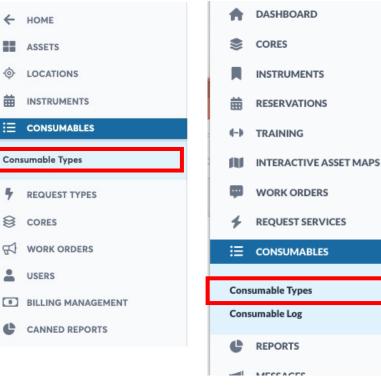
New menu structure

(HOME)

Current prod (ADMIN PANEL)

8

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«Consumable Types» submenu under • «CONSUMABLES» on Admin Panel is moved to «CONSUMABLES» main manu on HOME (no need to go to Admin Panel)

Core admin Add New Offline Service -> Log Consumable/s

New menu structure

DASHBOARD

INSTRUMENTS

RESERVATIONS

WORK ORDERS

Consumable Types

REPORTS

MECCACES

REQUEST SERVICES

INTERACTIVE ASSET MAPS

TRAINING

CORES

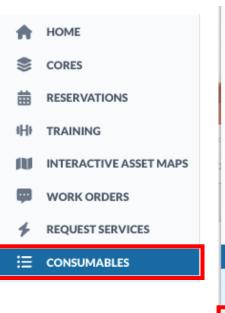
(HOME)

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Current prod (ADMIN PANEL)



 «Consumable Types» submenu under «CONSUMABLES» on Admin Panel is moved to «CONSUMABLES» main manu on HOME (no need to go to Admin Panel)

HOME	Consumabl	es		+ Add M	ew Offline Service						
RESERVATIONS	Search	Q Filters		I Colur	nns 🖶 Export					_	_
TRAINING INTERACTIVE ASSET MAPS WORK ORDERS REQUEST SERVICES CONSUMABLES	We could not find	Nothing to sh any matching records. Please con	ow in this table sider changing the		applicable			+	Log Co	nsumat	ble,
		DASHBOARD CORES	Con	sumable l	.0g <i>ะ</i>					+ Log Consumal	ble/s
		DASHBOARD CORES INSTRUMENTS	Con	sumable l	Q ▼ Filters	ŝ			⊞	+ Log Consumal	
		CORES INSTRUMENTS	Search	sumable l		Quantity	Units	Log Date	E Remarks		port Insert
		CORES INSTRUMENTS RESERVATIONS	Search		Q Filters		Units Unit	Log Date 23/10/2023 10:40		Columns 🔒 Ex	port
		CORES INSTRUMENTS	Search	D A User SE Naoe Tatara	Q Filters Consumable	Quantity		-	Remarks	Columns 🖶 Ex	port Inserte
		CORES INSTRUMENTS RESERVATIONS INTRACTIVE ASSET MAP	Search	D > User 55 Naoe Tatara (naoeta@uio.no) 54 Naoe Tatara (naoeta@uio.no)	Q Filters Consumable printer toner black	Quantity 1.00	Unit	23/10/2023 10:40	Remarks Reference reserv Reference reserv	Columns 🖶 Ex	port Inserta at
		 CORES INSTRUMENTS RESERVATIONS TRAINING INTERACTIVE ASSET MAP WORK ORDERS 	Search	D > User 55 Naoe Tatara (naoeta@uio.no) 54 Naoe Tatara (naoeta@uio.no)	Q Filters Consumable printer toner black	Quantity 1.00	Unit	23/10/2023 10:40	Remarks Reference reserv Reference reserv	Columns 🔒 Ex Inserted by naoeta@uio.no naoeta@uio.no	port Insert at

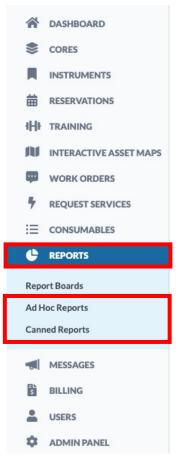
Core admin: Moved main/sub menu items **AD HOC REPORTS, CANNED REPORTS**

Current prod (home and admin panel) প номе S CORES RESERVATIONS łHł TRAINING INTERACTIVE ASSET MAPS 111 WORK ORDERS REQUEST SERVICES 三 CONSUMABLES PROJECTS AD HOC REPORTS MESSAGES DOCUMENTS BILLING SUBSCRIPTIONS Ċ. ADMIN PANEL

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	·@·
INSTRUMENTS	曲
	∷≡
REQUEST TYPES	7
G CORES	8
WORK ORDERS	
USERS	
BILLING MANAGEMENT	۲
CANNED REPORTS	e
Reservation Unique Users Report	Rese
Jser/Instrument Resevation Occupancy Report	User
Reservation Occupancy Report By Date	Rese
Reservation Occupancy Report By Position	Rese
Jsers onsite report (by Reservations)	User
Services Utilization Report	Serv
Services Utilization Report by Types	Serv
nstrument Reservation Utilization By Month	Instr
Jtilization rate for assembly parents by time slots setups)	
nstrument Reservation Utilization By Week Days	Instr
Services Utilization Report	Serv

Service Data Dump Asset Warranty Report

New menu structure



AD HOC REPORTS and • **CANNED REPORTS (on** ADMIN PALEL) were moved under REPORTS

 Reort Boards submenu is to be explained later in the presentation.

Core admin INSTRUMENTS menu on ADMIN PANEL

Current prod

New menu structure

Instruments List	Custom Forms
Custom Forms	Accompanied Services
Accompanied Services	Instrument Price Categories
Instrument Price Categories	Clone Instrument Settings
Clone Instrument Settings	Cores Reservation Permissions
Cores Reservation Permissions	Instrument Specific Permissions
User Permissions	Permission Levels
Permission Levels	Asset Templates
Asset Templates	F REQUEST TYPES

«User Permissions» got a new name «Instrument Specific Permissions»

Core admin Dashboard: System Main Dashboard

bokitlab	= 🍘 UiO: Universitetet i Oslo Enter an asset name or asset attribute Q 💥 🕏 P4B_Test S ² 😵 🕹 core admin 🗸
ASHBOARD	System Main Dashboard
Main Dashboard	
S CORES	Quick Actions
INSTRUMENTS	
# RESERVATIONS	1 Upcoming reservations & Usage Records Sample Requests
- TRAINING	Place a reservation or view schedule Start a real time usage of an instrument Submit a service request for one of the offered services
INTERACTIVE ASSET MAPS	
WORK ORDERS	+ Reguest Service Requests
REQUEST SERVICES	
	Consumable & Work Orders
	Report the use of consumable/s (self serve) Report an instrument related issue/ work order
C REPORTS	
MESSAGES	Log Consumable/s IIII Renew Stock + Work Order V List
BILLING	
LUSERS	
2 ADMIN PANEL	Timeline 🖸 : + Add Reservation
	Nov 07, 2023 V A > \= Timeline by Day V
	00:00 01:00 02:00 03:00 04:00 05:00 06:00 07:00 08:00 09:00 1
	Crushing room Welcome to the Dashboard
	Announcement
	FFU staff A Announcement This message appears until the end of the 12th Nov. X
	GC with SSL inlet/FID - gas Welcome to the Dashboard Announcement for test. Bookitlab
	GC with SSL inlet/FID - liquid is a comprehensive lab management platform with specialized suites and modules. The system has been used in leading scientific institutions across the US, Canada, Australia, Europ

- When you select multiple cores, System Main Dashboard is shown.
- This applies no matter if you are a core admin of any or all of the selected cores or not.

Core admin Dashboard: Core dashboard (of your core)

bokitlab	Enter an asset name or asset attribute Q 💥 🕏 P4B_Test S V 🙆 O core admin V
ASHBOARD	Vou are currently viewing the users board for this core. You can switch to core staff board/s, or add a new board:
Main Dashboard	P4B_Test Service Group
 CORES INSTRUMENTS 諾 RESERVATIONS 	Quick Actions
RESERVATIONS TRAINING INTERACTIVE ASSET MAPS	Book A reservation!
WORK ORDERS REQUEST SERVICES CONSUMABLES	+ Reservation Start Usage Log Consumable/s III Renew Stock + Work Order v List
REPORTS MESSAGES BILLING	Timeline 2 🖸 : + Add Reservation
LUSERS	✓ Nov 09, 2023 ♥ ♠ > 00:00 01:00 02:00 03:00 04:00 05:00 06:00 07:00 08:00 09:00 10:00 11:00 12:0
	Microscope A
	Microscope B Welcome to the Dashboard Announcement
	galD_Additional_instrument This message appears until the end of the 12th Nov. Welcome to the Dashboard Announcement for test. Bookitlab is a comprehensive lab management platform with specialized suites and modules. The system has been used in leading scientific institutions across the US; Canada; Australia; Europ

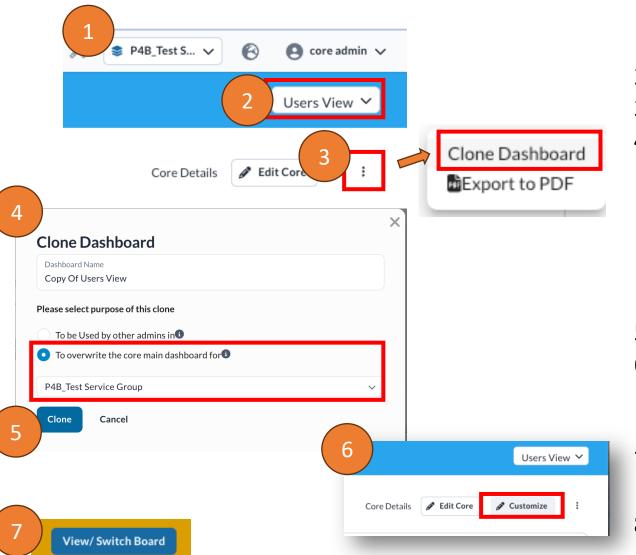
- When you select a core that you are a core admin of, it shows core dashboard with customization possibility.
- You can customize «Users View» and staff view.

Core admin Dashboard: Core dashboard (user view)

b okitlab	Enter an asset name or asset attribute	٩	💥 😫 IBV - Oslo 🗸 🔞 📀 core admin 🗸
A DASHBOARD	IBV - Oslo NorMic Imaging Plat	form	Core Details
Main Dashboard			
CORES	Quick Actions		
	Book A reservation! Usage Record Place a reservation or view schedule Start a real time usage		Work Orders Report an instrument related issue/ work
- TRAINING			order
INTERACTIVE ASSET MAPS	+ Reservation Start Usage		+ Work Order 🗸 List
WORK ORDERS			
✤ REQUEST SERVICES			
	Timeline 🖸		E + Add Reservation
MESSAGES	< Nov 07, 2023 V 🌴 >		🔚 Timeline by Day 🗸
BILLING	00:00 01:00 02:00	03:00 04:00 05:00	0 06:00 07:00 08:00 09:00 1
LUSERS			
CADMIN PANEL	Andor Dragonfly Spinning Di		
	Andor Revolution Spinning D		
	Leica TIRF Microscope		
	Olympus FV1000 confocal m		
	Olympus FV1000 Upright co	We	elcome to the Dashboard
	Olympus SpinSR SoRa Spinni	An	nouncement
	Workstation 1 - 3604		message appears until the end of the 12th Nov.
		is a co suite: scien	ome to the Dashboard Announcement for test. Bookitlab omprehensive lab management platform with specialized as and modules. The system has been used in leading tific institutions across the US, Canada, Australia, Europ and the Middle Est with a prevent scool clice 2007.

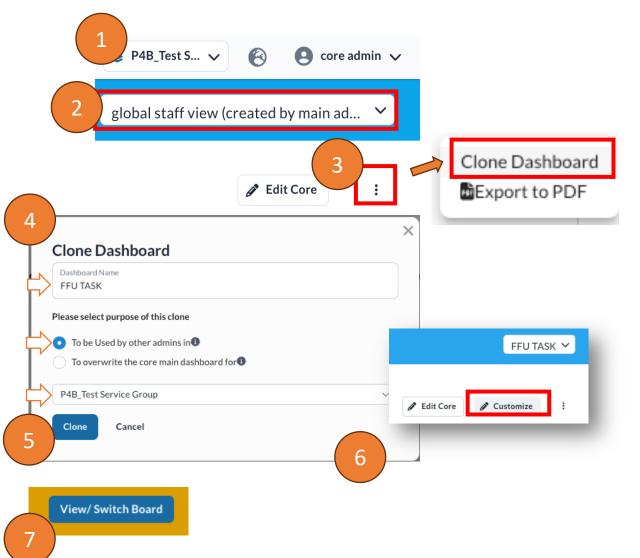
 When you select a core that you are NOT a core admin of, then you will wee «User View» of the board.

Core admin Core main dashboard; end users view



- 1. Select one core that you are a core admin of.
- 2. Choose «Users View».
- 3. Click three-dots icon and «Clone Dashboard».
- 4. On the pop-up window,
 - i. Select «To overwrite the core main dashboard for», and
 - ii. the core this new dashboard would be used for.
 - «Dashboard Name» can be left as is
- 5. Click «Clone».
- 6. Open «Users View» dropdown and choose one that shows «Customize» button, and click it for editing.
- 7. When editing is done, click «View/Switch Board».
- 8. After this, you will see only one «Users View».

Core admin Core staff dashboard; core staff view



- 1. Select one core that you are a core admin of.
- 2. Choose «global staff view».
- 3. Click three-dots icon and «Clone Dashboard».
- 4. On the pop-up window,
 - i. Fill in a new dashboard name,
 - ii. select «To be Used by other admins in» and
 - iii. Choose the core this new dashboard would be used for.
- 5. Click «Clone».
- 6. Open the newly made bashboard, and click «Customize» for editing.
- 7. When editing is done, click «View/Switch Board».
- 8. After this, core admin can choose this dashboard and also can add another board.

Core admin Common dashboards are under optimization

Main administrator team at UiO in collaboration with the service provider (Prog4Biz) are still working on optimizing Common dashboards (System Main Dashboard, Global Staff View).

Please mind that these common dashboards will be updated within the next few weeks.

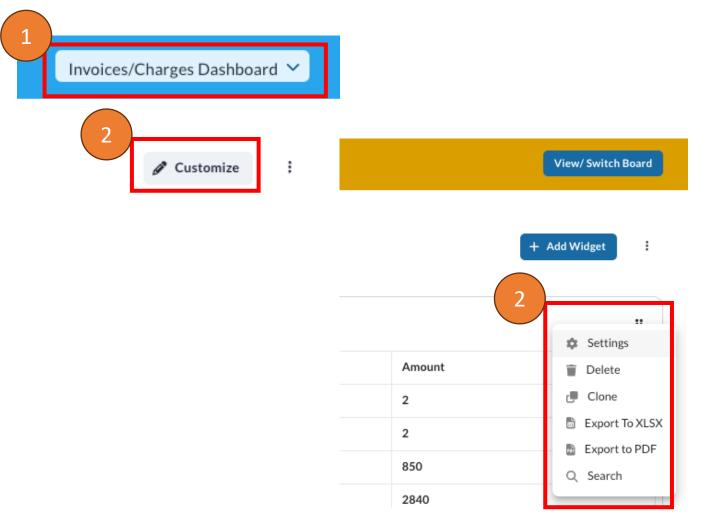
It is totally up to you to create your core's own boards for both user view and staff view before the common dashboards are updated.

Core admin Report Boards

bØkitlab	🗮 🅢 UiO : Universitetet i Oslo	Enter an asset name or asset attribute	Q 🕺 structure FFU - Data V 🔞 de core admin V
A DASHBOARD	Switch to another board, or create a new core		Invoices/Charges Dashboard 🗡
CORES			
	Invoices/Charge	es Dashboard	
RESERVATIONS		/	
- TRAINING	invoices by month $ oldsymbol{arepsilon}$		
INTERACTIVE ASSET MAPS			Percentration Query Dashboard
WORK ORDERS	Invoice# ~	Month Number	Reservation Query Dashboard
REQUEST SERVICES	342	2023/01	
CONSUMABLES	342		Asset Dashboard
		2023/09	Asset Dashboard
Report Boards		2023/10	
Ad Hoc Reports		2023/11	Utilization Dashboard
Canned Reports		2023/12	Othization Dashboard
MESSAGES			
BILLING	5 🔻		Licagos Dashboard
USERS			Usages Dashboard
ADMIN PANEL			
	Invoice query budget 🔞		Departing
	(!) Loading Failed		Reporting
			-
			Invoices/Charges Dashboard
	invoice query 🔞		invoices/charges Dashboard
	() Loading Failed		
			+ Add Board

- Reort Boards is a dashboard of diverse types of data (e.g. Reservation query, invoices/charges)
- As a core admin, you can customize/add boards and widgets.

Core admin How to customize reports board



- 1. Choose a board
- 2. Click «Customize»
- Click icon on the rightshoulder of a widget and click «Settings»

Questions, issues, problems?

Send feedback/questions to bookitlab-hjelp@usit.uio.no