

## iLab External Customer Access Process

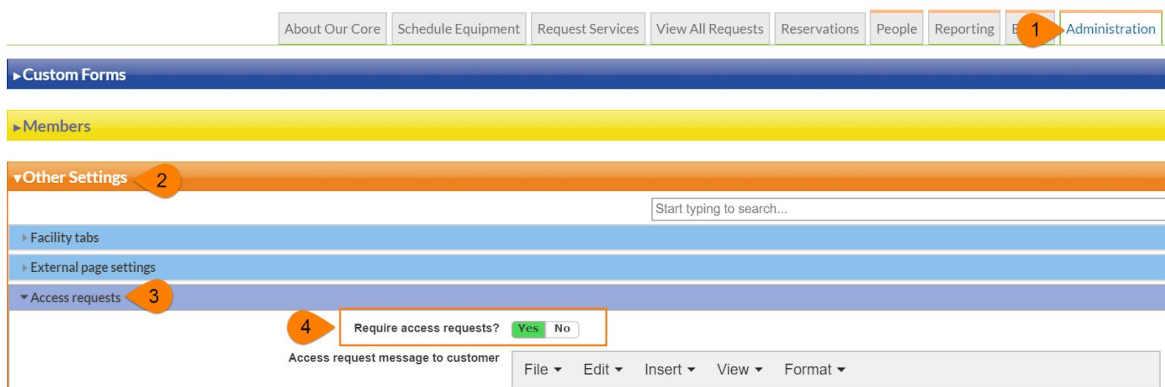
External users must have an external user agreement in place, payment needs to be established, and appropriate training must occur before the user can fully access a core. In order to control access to external users Notre Dame utilizes the feature 'Access Request.' This feature only needs to be turned on for cores that have external users accessing their site. Cores with external customers will also have a project request called "External Customer Agreement" where the expiration date of the agreement can be tracked, and the agreement can be uploaded.

### Setting Up Access Request

The Access Request feature restricts access to both internal and external users by default. To give access to all Notre Dame users, we will grant University of Notre Dame full access. This means anyone that lives within Notre Dame will automatically have access to cores that the feature is turned on in.

During implementation the implementation specialist will turn the setting on and grant University of Notre Dame access if the core has external users that will use their site. If you need to turn this setting on for a core in the future, follow the steps below.

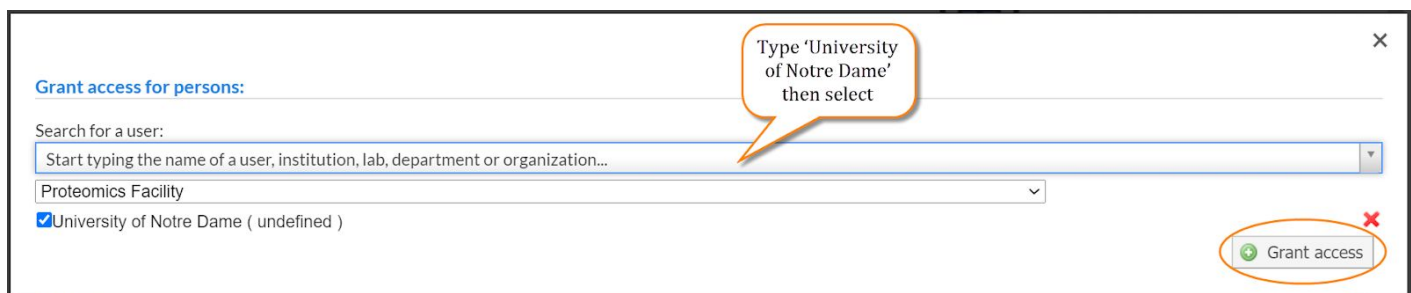
1. Navigate to the core's 'Administration' tab
2. Open the 'Other Settings' section
3. Open 'Access Requests'
4. Turn the first setting, 'Require access requests' to 'Yes'



5. Click 'apply' at the bottom of the section
6. Refresh your browser
7. Next University of Notre Dame needs to be granted access
8. On the 'Administration' tab of the core click the 'Access Requests' section
9. Choose '+ access to a new customer'



10. Type 'University of Notre Dame' within the search box then select
11. A check box with 'University of Notre Dame' will now appear at the bottom
12. Below the search box the name of the core is listed
13. Click 'Grant access' and a new window will pop up



14. Within the section 'Access Requests' select the check boxes for 'Can access equipment' and 'Can access services'
15. Uncheck the 'Send email' box
16. Lastly, click 'Approve' at the bottom left

## Access Requests:

University of Notre Dame

Date:	Current status:	Can access equipment:	Can access services:	Training Status:
Jun 11 '20	ready	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Not started <input type="button" value="v"/>

Access request note

**B** *I* U

p

Send email? Enter email text:

**B** *I* U

p

...track additional access request notes - core use only.

Approve (email optional)  date (no email)  Reject (no email)

...all emails contain a link to your core and support contact info.

17. Now all users that live within Notre Dame will have access to the core and do not have to request access
18. To confirm that Notre Dame has been given access navigate to the 'Administration' tab of the core
19. Open the 'Access Requests' section
20. Type 'University of Notre Dame' in the text box and choose 'Approved' from the drop-down menu
21. Click search
22. Notre Dame should then appear. If it does not repeat steps 1-16.

**Access Requests:**

University of Notre Dame

Date:	Current status:	Can access equipment:	Can access services:	Training Status:
Jun 11 '20	ready	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Not started

Access request note

**B** *I* U ↶ ↷ ☰ ☷

p

Send email? Enter email text:

**B** *I* U ↶ ↷ ☰ ☷

p

...track additional access request notes - core use only.

Approve (email optional)  Update (no email)

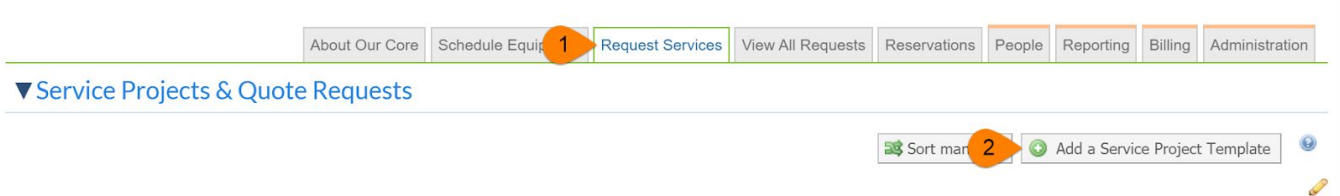
...all emails contain a link to your core and support contact info.

Reject (no email)

**Setting up External Customer Agreement Project Request**

Each core that has external customers will have a project request for the External Customer Agreements. This will allow administration and core staff to track the agreement in place and the expiration date. During implementation the implementation associate will set up the project but if one needs created for a core in the future follow the steps below.

1. On the 'Request Services' tab within the core click 'Add a Service Project



Template'

2. Enter the name 'External Customer Agreement'
3. Enter any descriptions or notes if needed
4. For category choose 'Add new category' then name the category 'External Customer Agreement'

## Overview

Name	External Customer Agreement
Description	<div style="border: 1px solid #ccc; padding: 5px;"><p>File Edit Insert View Format</p><p><b>B</b> <i>I</i> <u>U</u>   ↶ ↷   ≡ ≡ ≡</p><p>Paragraph Font Sizes <i>I</i><sub>x</sub>   📄</p><p><b>A</b> ▾   ☰ ☷ ☹ ☺</p><p>×<sub>2</sub> ×<sup>2</sup> Ω 🔗 🗑️ 📌 🖼️ 📄</p><p>p</p></div>
Summary Field Name	Request Summary
Category	External Customer Agreement ▾

- a. Once we save this template it will look as though the name of the project

### ▼ Service Projects & Quote Requests

External Customer Agreement (External Customer Agreement)	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">Sort manually</div> <div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">Add a Service Project Template</div> <span>🔍</span>
	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">initiate request</div> <span>✎</span> <span>✖</span>

In parenthesis is the category which makes filtering easier

is duplicated but one is the category name which later will make filtering for these agreements easier.

5. Change the setting 'Visibility for core customers' to 'Do not allow customer to initiate'

- a. This means the core staff will be submitting this request on behalf of the

## Visibility

Visibility for core customers	Do not allow customer to initiate ▾
Publicly visible on this core's landing page and searchable on institution's external search?	No ▾

user

6. Click 'save' at the bottom

7. After the first request is created, or you can create a test request, you will create a filtered tab on the 'View All Requests' tab

a. On the View All Request tab within the filters check 'External Customer

The screenshot shows the 'View All Requests' page. At the top, there are navigation tabs: 'About Our Core', 'Schedule Equipment', 'Request Set', 'View All Requests' (highlighted), 'Reservations', 'People', 'Reporting', 'Billing', and 'Administration'. A red circle with the number '1' is placed over the 'View All Requests' tab. On the left, there is a filter sidebar with sections for 'Keywords', 'Status', and 'Category'. Under 'Category', the checkbox for 'External Customer Agr...' is checked, and a red circle with the number '2' is placed over it. The main content area shows a table of requests with columns for 'date', 'for', 'service id', 'status', 'payment number', and 'cost'. Two requests are visible, both with a status of 'Waiting for Core to Begin'. A 'Begin' button is visible next to the second request.

Agreement'

b. Click 'Apply Filters' at the bottom

c. Click 'Create Tab from Filters'

This screenshot shows the same 'View All Requests' page, but with the filter sidebar open on the left. The sidebar contains options for filtering by 'Request Date', 'Start Date', 'Due Date', and 'Completed Date'. Below these are 'Apply Filters' (checked), 'Reset Filters', 'Create Tab from Filters', and 'Download Results as CSV'. A red circle with the number '3' is placed over the 'Apply Filters' button, and a red circle with the number '4' is placed over the 'Create Tab from Filters' button. The main table shows two requests. The first request has a status of 'Waiting to Submit to Researcher' and a 'Submit' button. The second request has a status of 'Processing' and a 'Complete' button.

d. Name the tab 'External Customer Agreements'

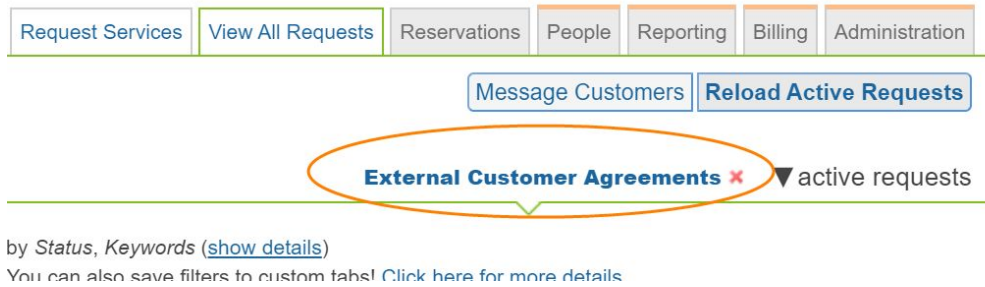
e. Change 'Share with' to 'Core Staff'

f. Click 'Create'

The screenshot shows a dialog box titled 'Create a new tab from current filters'. It has a close button in the top right corner. The dialog contains the following fields: 'Tab name' with the text 'External Customer Agreements' and a red circle with the number '5' next to it; 'Description' with an empty text area; and 'Share with' with a dropdown menu showing 'Core staff' and a red circle with the number '6' next to it. At the bottom of the dialog are 'Create' and 'Cancel' buttons, with a red circle with the number '7' placed over the 'Create' button. Below the dialog, the 'Create Tab from Filters' and 'Download Results as CSV' buttons from the previous screenshot are visible.

g. Now at the top of the 'View All Requests' tab there will be another tab

where all External Customer Agreements will be filtered to



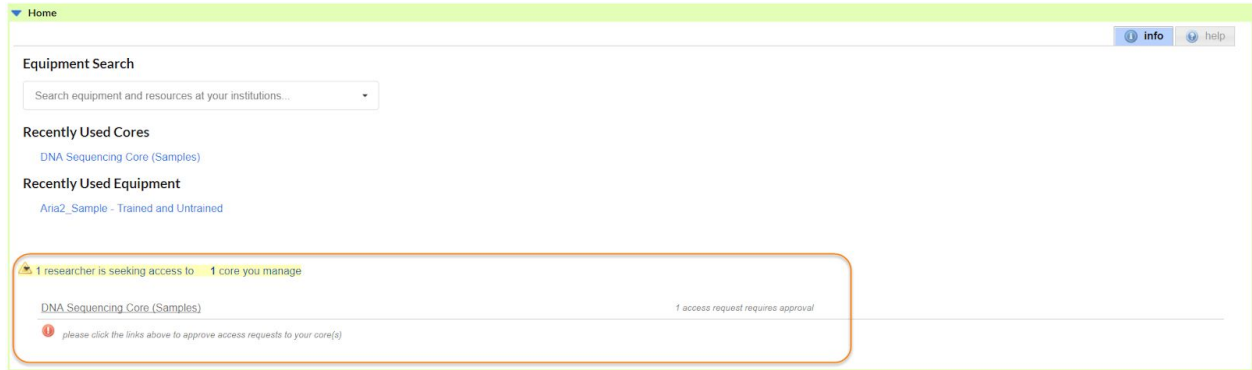
## External User Workflow

### Requesting and Approving Access Request

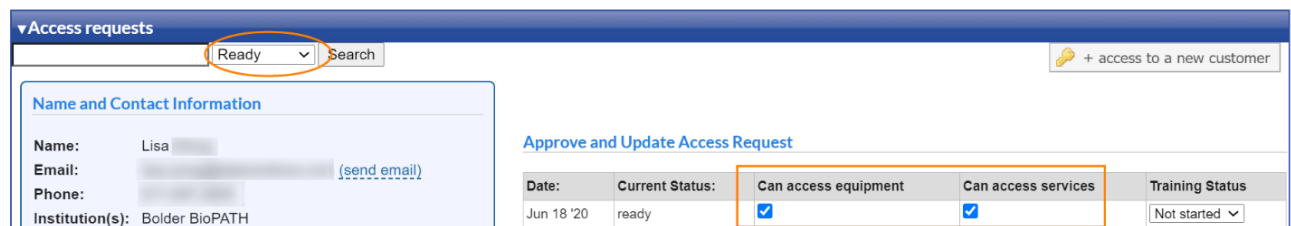
1. External user navigates to Notre Dame core to make a reservation or submit a request
2. The external user will be presenting with the following screen



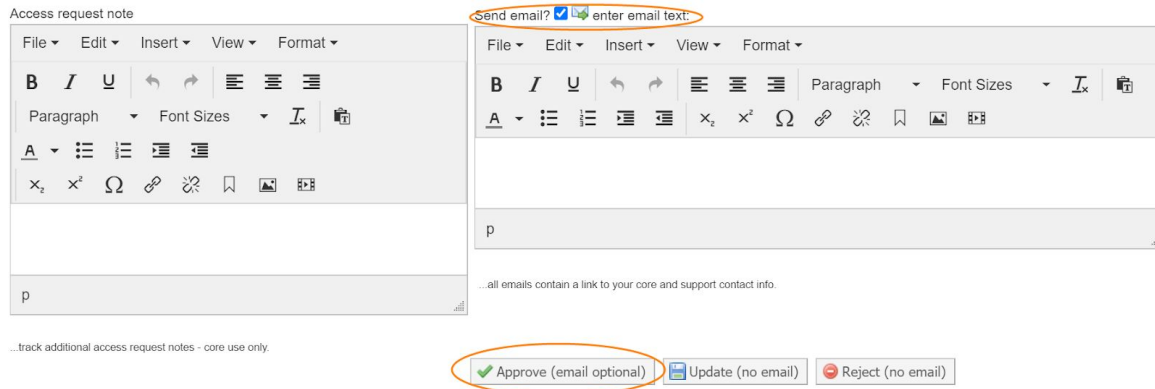
3. The user can add a note then select 'Send access request'
4. The core staff will receive an email notifying them a user is requesting access to their core
5. They can also see this on their 'Home' page



6. Core staff/admin must contact [ndcores@nd.edu](mailto:ndcores@nd.edu) for confirmation that the external user has a signed agreement before taking action on this request.
7. The institution admin will take it from here.
8. Once it is confirmed they have a signed agreement the institution admin can grant the external user access to their core
  - a. *It is important that this is confirmed first because we do not want external users without an agreement utilizing a core*
9. To grant the user access navigate to the 'Administration' tab within the core
10. Open the 'Access Requests' section
11. Confirm that the drop-down menu in the upper left corner of the section is set to 'ready'
12. This will display all users that have requested access
13. Search for the user that has a signed external user agreement that you wish to grant access to
14. Check the boxes 'Can access equipment' and 'Can access services'
15. Check the box if you wish to send an email
16. Click 'Approve'







## Submitting External User Agreement Project Request

Once the user has a signed agreement and they have requested access to the core, an External User Agreement can be submitted on behalf of the user.

1. On the 'Request Services' tab click 'Initiate Request'
2. Above the right side of the search bar select 'All with access'
3. Start typing the users name in the box then select the user

## External Customer Agreement



4. Click 'Proceed'
5. No other details need to be added to the request
6. Check the 'Skip approval?' box in the bottom left of the request
7. Click 'Submit request to researcher'
8. On the 'View All Requests' tab click the 'External Customer Agreements' tab that was created in the previous section



9. Find the user's request in the list and click the yellow edit pencil with green arrow on the right

▶ Jun 18 (Jun 18 2020)	Lisa Wong <u>Testing_Lab_(TEST)</u>	NDTC-LW-7 External Customer... External Customer Agreement	Waiting for Core to Begin	\$0.00 (\$0.00)	

10. Click 'track work' and enter the expiration date of the agreement in the completed box

11. Click 'Apply changes'