

Administrators Using Agilent CrossLab Connect

Introduction

Agilent CrossLab Connect (CLC) allows two roles, the administrator role and the user role. This guide outlines the following unique privileges and the additional functionality designed for CrossLab Connect Administrator, including the ability to:

- Receive notifications when new users request access to assets
- View user profiles and update user roles from user to admin and vice versa
- Create User Groups and add users to User Groups
- Assign User Groups to Asset Groups
- Create Asset Groups and add assets to Asset Groups
- Submit edit requests for assets
- Customize graphs and tables in Inventory Manager
- Archive Assets

Admin privileges

For the CLC administrator (Admin), the Admin icon will be available in the left-hand navigation panel (Figure 1).

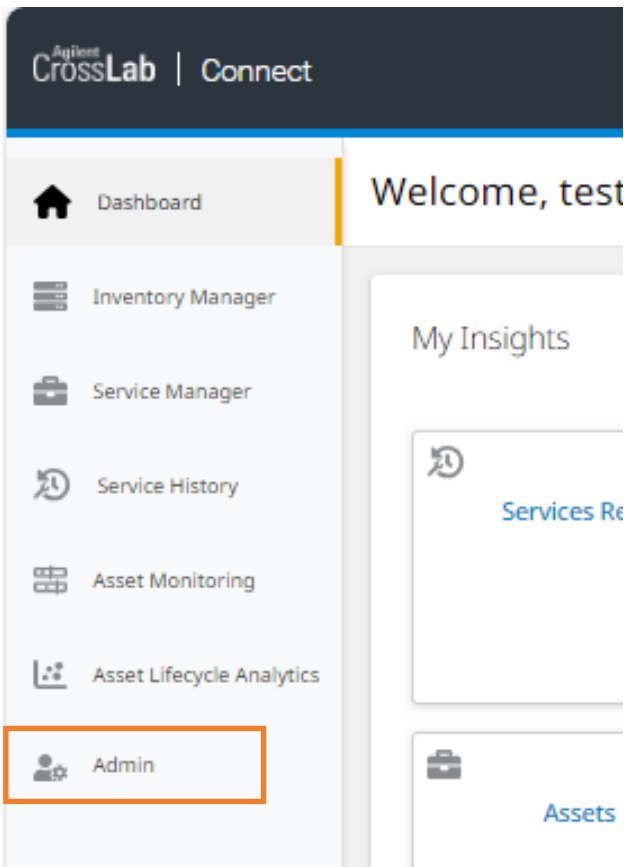


Figure 1. Admin icon.

Within the Admin page, Admins can assign User Roles, manage User Groups, create Asset Groups, customize the Inventory Table View, and Organize Inventory Locations by clicking on the relative tile (Figure 2). Other Admin features are accessed directly in Service Manager or Inventory Manager.

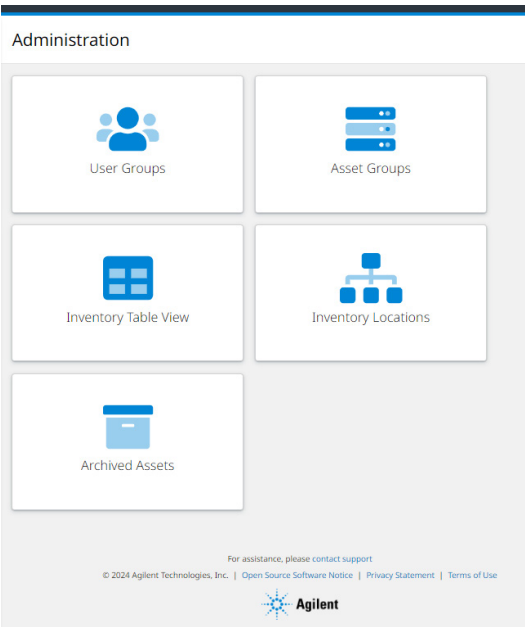


Figure 2. Admin page view.

Assigning user roles

Upon login to CrossLab Connect, all users are automatically assigned to the User role in CrossLab Connect. See "Introduction to Using Agilent CrossLab Connect" for details about requesting permissions from the Admin. The Admin(s) of the company in CrossLab Connect will receive an email informing them to assign the user to a User Group to see assets (Figure 3).



Figure 3. Example email sent to an administrator by a user requesting access.

If a new user requests administrator access, an existing user with Admin-level access must make the update. To make this change, an Admin can update the user's profile by navigating to the Admin page and clicking the **User Groups** tile (Figure 2).

On the User Groups screen, click **All Users** (Figure 4).

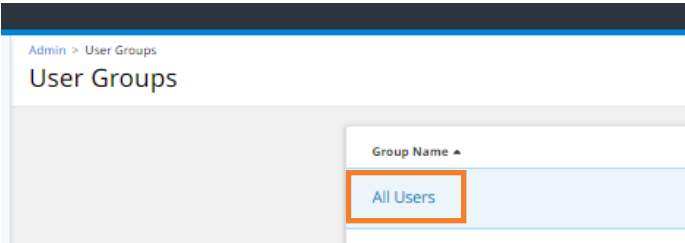


Figure 4. The All Users link on the User Groups page.

On the All Users page, click the user's name (Figure 5).

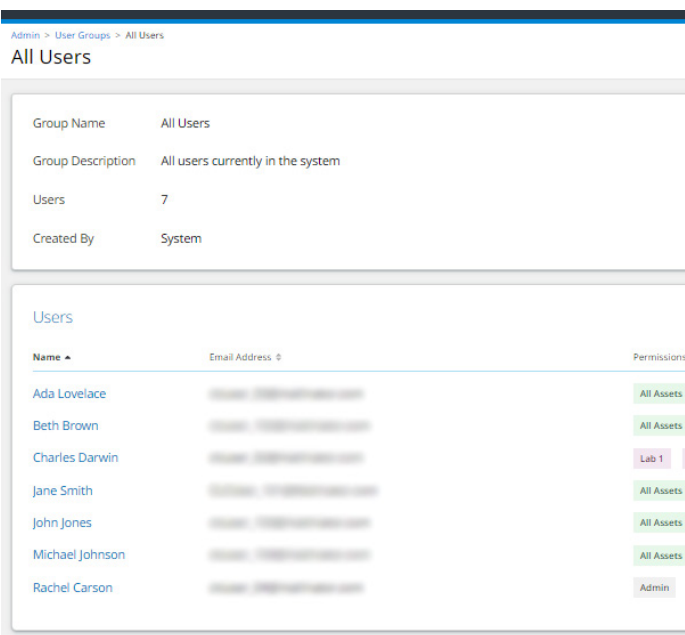


Figure 5. The name of the user on the All Users page.

On the User Details page, go to the Roles field and select **Administrator** (Figure 6). The user will need to log out and log back into CrossLab Connect to see the account update to Administrator.

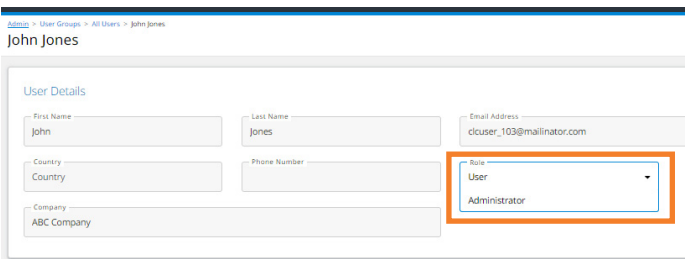


Figure 6. The Role field on the User Details page for the selected user.

Creating User Groups

The User Groups feature allows admins to create groups of users that may be assigned to groups of assets. When a user logs in for the first time, they can request access to assets. The Admin must assign the user to a group to give the user access to assets.

On the User Groups page (Figure 4), click **Create User Group** on the top right (Figure 7).

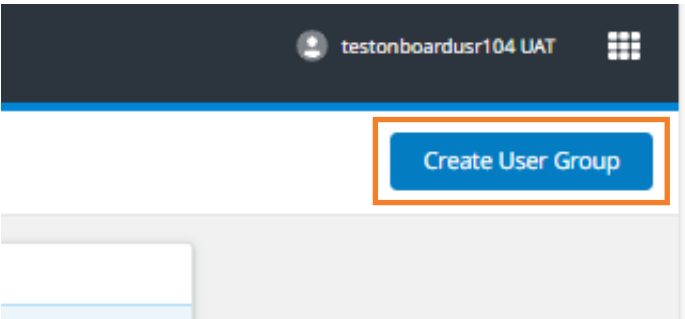


Figure 7. The Create User Group button on the User Groups page.

Name the User Group and, if desired, give it a description. Click the **Create Group** button (Figure 8).

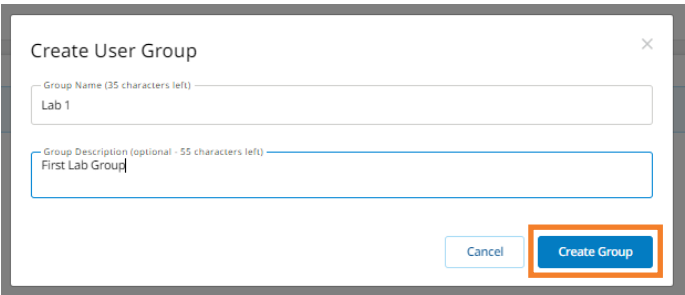


Figure 8. The Create User Group dialog.

Click the **group name** to open and view the User Group (Figure 9).

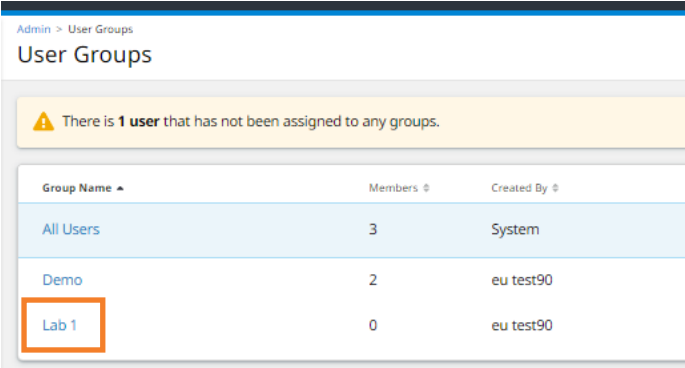


Figure 9. Group names listed on the User Groups page.

Managing users in a group

To add a user, go to the group page and click **Add User** (Figure 10).

Use the search field at the top of the list to search for a user (Figure 11A). To add users to the group, click the **Add User** button (Figure 11B), this will open a list of all users. Select the users who should be included in the user group by checking the box to the left of the user's name (Figure 11C) and click **Add Users**.

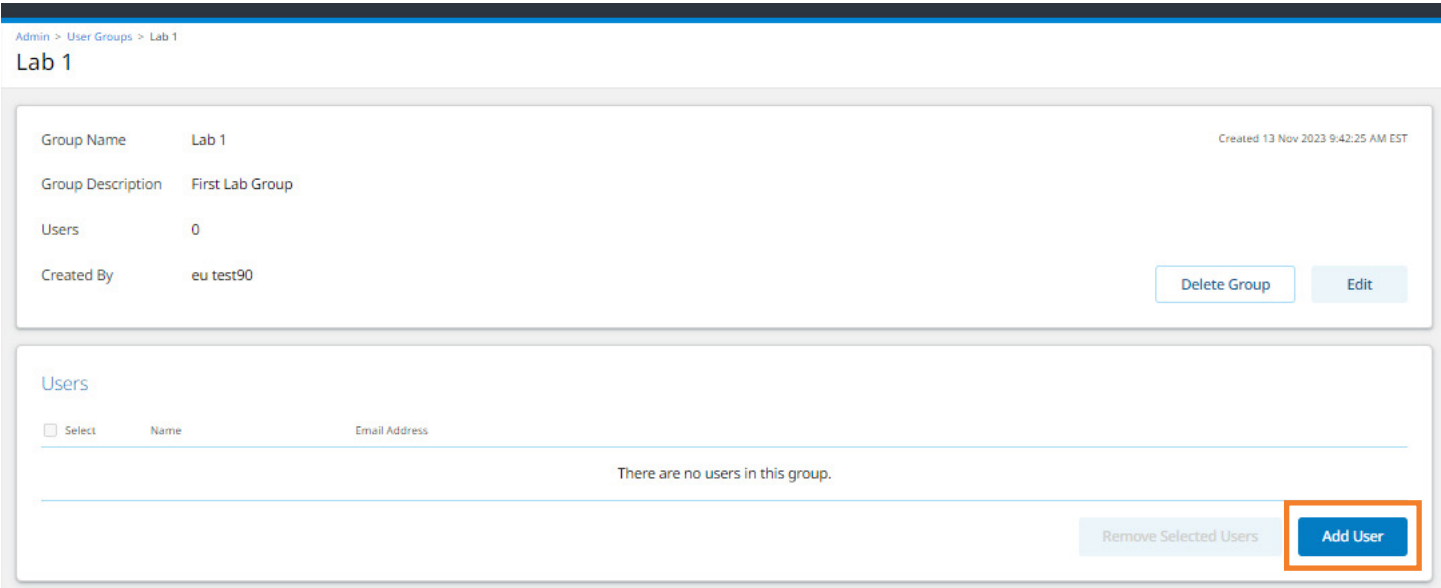


Figure 10. The Add User button on the selected user group page.

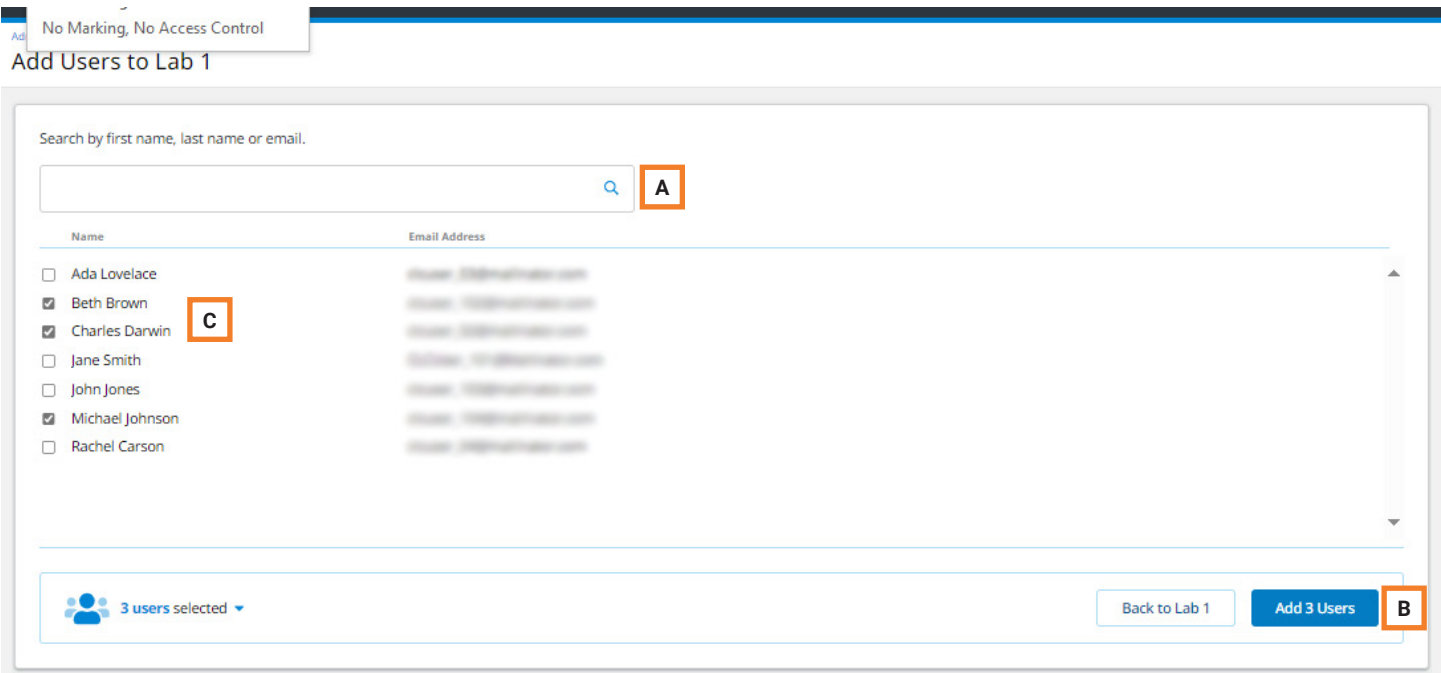


Figure 11. The Add User page.

The users assigned to the group will appear in the Users list for the group (Figure 12A).

To remove a user, check the box to the left of the name and click **Remove Selected Users** (Figure 12B).

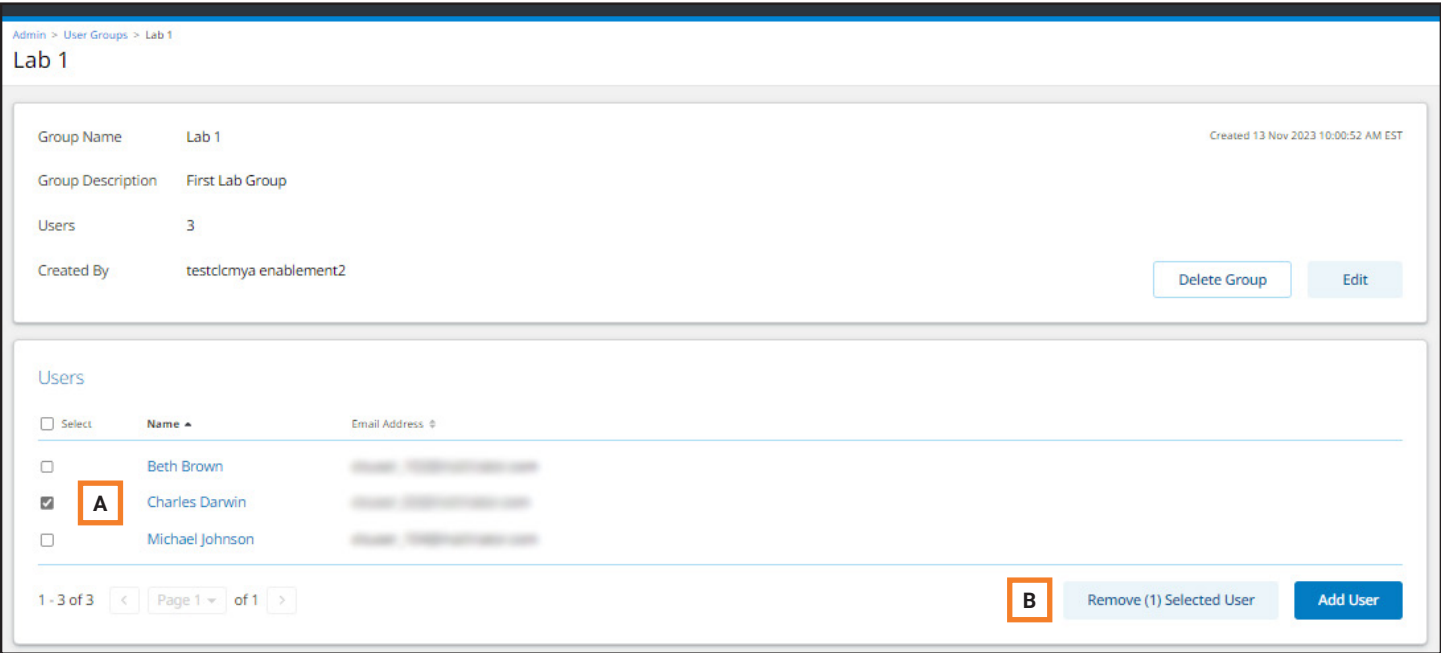


Figure 12. The Users list on the selected group page.

Assigning User Groups to Asset Groups

Once your User Group is created and users are added, go back to the Admin page, and click **Asset Groups** (Figure 13).

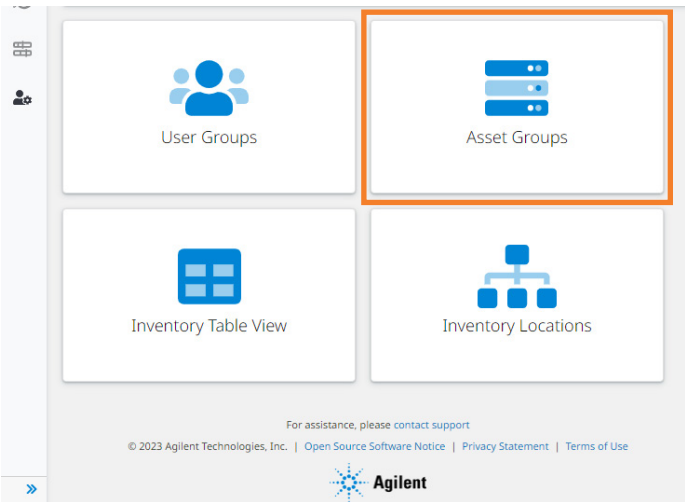


Figure 13. The Asset Groups tile on the Admin page.

If you do not have an asset group created, view Asset Groups and create an asset group (see the "Asset Grouping" section).

Click the name of the Asset Group to which the users should be assigned (Figure 14).

On the selected Asset Group page, scroll to the bottom right of the page, and click **Add User Group** (Figure 15).

Admin > Asset Groups

Asset Groups

Create Asset Group

Group Name ▲	Assets ☺	Created By ☺	Description ☺
All Assets	102	System	This is a list of all assets in your system.
Analytical Lab - Covered	0	testclmya enablement2	Contracted Asset in the Analytical Lab.
Analytical Lab - No Coverage	0	testclmya enablement2	Asset on-demand service only. No coverage.
John's QC Lab	0	testclmya enablement2	John Jone's QC Lab Assets.
QC Department - Covered	6	testclmya enablement2	Assets under contract in QC Dept.
QC Department - No Coverage	0	testclmya enablement2	Assets on-demand service only. No coverage.
Rachel's GMP Assets	0	testclmya enablement2	Rachel's GMP Asset Group.

Figure 14. The asset groups list on the Asset Groups page.

Admin > Asset Groups > QC Department - Covered

QC Department - Covered

Group Name: QC Department - Covered Created 13 Nov 2023 10:47:38 AM EST

Group Description: Assets under contract in QC Dept.

Assets: 6

Created By: testclmya enablement2

Delete Group Edit

Assets

Select	Asset ▲	System Handle / Asset Tag ☺	Model Number ☺	System ID / Serial Number ☺
<input type="checkbox"/>	8890 Gas Chromatography Advanced System			25307205
<input type="checkbox"/>	Agilent 7890B Series GC Custom		G3440B	CN13493095
<input type="checkbox"/>	Infinity II 1290 LC Base System			25849661
<input type="checkbox"/>	LC 1260 Infinity II System w/ Enh. Feat.			22832053
<input type="checkbox"/>	LC 1290 System	LC - 03768		1744988
<input type="checkbox"/>	LCMS 6224 TOF SYS w/ Enh Ftrs - Extd Srv			1745006

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Remove Selected Assets Add Asset

User Groups

Select	Group Name ▲	Members ☺	Created By ☺	Description ☺
<input type="checkbox"/>	Lab 1	4	testclmya enablement2	First Lab Group

1 - 1 of 1 < Page 1 of 1 >

Remove Selected User Groups Add User Group

Figure 15. The selected asset group, with no user groups added.

Select the User Group (Figure 16A) to add to the Asset Group and click **Add Group** (Figure 16B).

The User Group is now visible at the bottom of the Asset Group page (Figure 17A).

To remove the User Group, check the box to the left of that group and click **Remove Selected User Groups** (Figure 17B).

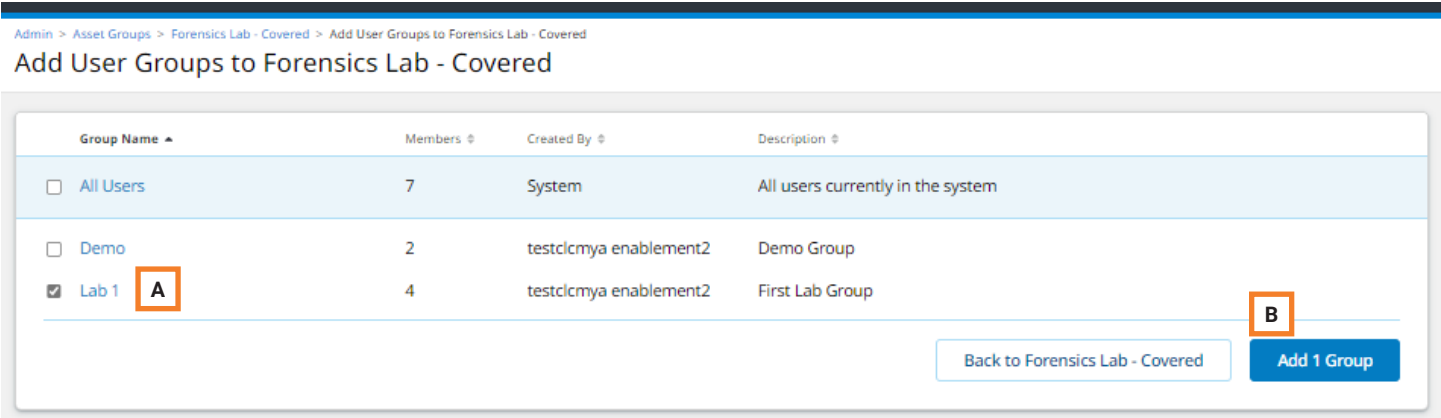


Figure 16. The list of user groups that can be added to the selected asset group.

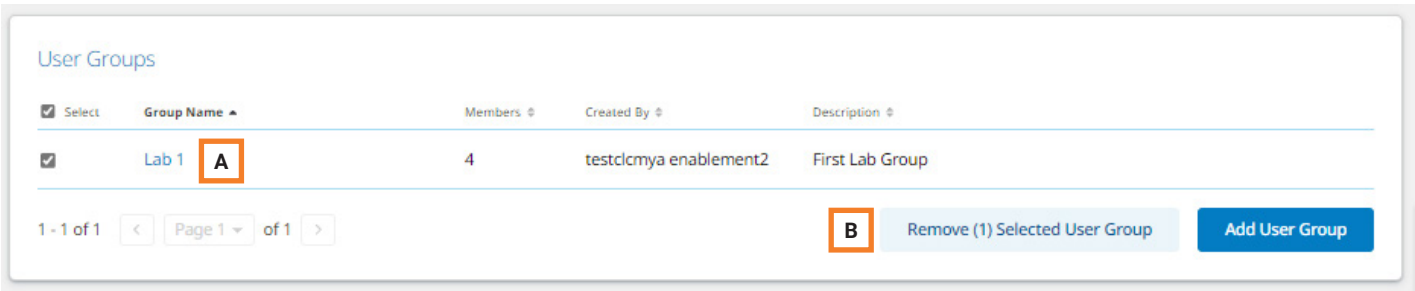


Figure 17. The selected asset group, with the selected user group added.

Viewing permissions and the All User Group

To view all users and the groups to which they are assigned, select **User Groups** from the Admin page (Figure 18).

There is a default system group for all users at the company (Figure 4). You may need to use the pagination at the bottom of the page to review all users (Figure 19). Click the **All Users** link.

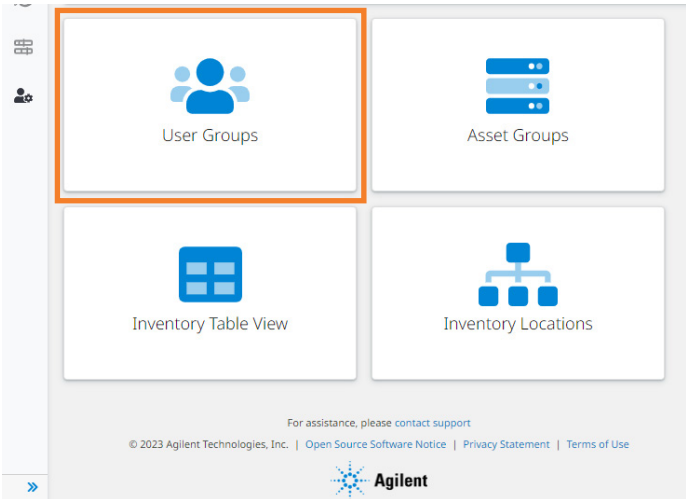


Figure 18. The User Groups tile on the Admin page.

Demo	2	testclmya enablement2	Demo Group
Lab 1	4	testclmya enablement2	First Lab Group

1 - 2 of 2
10 per page
Page 1 of 1

Figure 19. Pagination to review all User Groups.

A list of all users is shown (Figure 20A). To the right of each user is the list of groups to which they are assigned. Violet represents User Groups, and green represents Asset Groups. If a user has access to many groups and the entire list is not shown on the page, the three dots to the right can be used to show the entire list of groups. Click the dots (Figure 20B) to show the entire list.

Note: Admins may assign the All Users group to the All Assets group, which automatically gives any new user at the company access to all assets. This action may be most appropriate for companies that do not have a granular permissions structure.

Admin > User Groups > All Users

All Users

Group Name
All Users

Group Description
All users currently in the system

Users
7

Created By
System

Users

Name ▲	Email Address ☺	Permissions
Ada Lovelace	ada.123@mycompany.com	<div> <div>A</div> <div>Analytical Lab Group</div> <div>Analytical Lab - No Coverage</div> <div>Analytical Lab - Covered</div> <div>...</div> <div>B</div> </div>
Beth Brown	beth.123@mycompany.com	<div>Admin</div> <div>Lab 1</div> <div>QC Department - Covered</div> <div>QC Department - No Coverage</div> <div>...</div>
Charles Darwin	charles.123@mycompany.com	<div>Lab 1</div> <div>Demo</div> <div>QC Department - Covered</div> <div>QC Department - No Coverage</div> <div>...</div>
Jane Smith	jane.123@mycompany.com	<div>All Assets</div>
John Jones	john.123@mycompany.com	<div>Admin</div> <div>John's Lab Group</div> <div>John's QC Lab</div> <div>All Assets</div>
Michael Johnson	michael.123@mycompany.com	<div>Lab 1</div> <div>QC Department - Covered</div> <div>QC Department - No Coverage</div> <div>All Assets</div>
Rachel Carson	rachel.123@mycompany.com	<div>Admin</div> <div>Rachel's Lab Group</div> <div>Rachel's GMP Assets</div> <div>All Assets</div>

Figure 20. User Permissions on the All Users page.

Asset Grouping

This section reviews the feature Asset Grouping which allows users to build asset groups that can be used to filter across CLC applications.

Asset Grouping allows an Admin to combine a list of assets in one group that can be viewed on applications across CrossLab Connect. This list of assets may include all instruments in a department, a favorites list, assets on contract, GxP assets, or a list of instruments with a related purpose.

On the Admin page, click **Asset Groups** (Figure 13). When the page opens, there will be a banner at the top indicating the total number of assets not in a group. Additionally, there will be one group under the table that indicates All Assets. This is a permanent group that reflects all the assets visible to your company at the time and it cannot be edited. Once groups are added, they will populate below the All Assets group and can be sorted by any column chosen in the table (Figure 21A). To create an asset group, click the **Create Asset Group** button on the top right (Figure 21B).

Name the asset group and provide a brief description, then click the **Create Group** button (Figure 22). The group appears in the list with zero assets. Click on the group name to add assets.

Once on the new group page, click the **Add Asset** button on the bottom right (Figure 23).

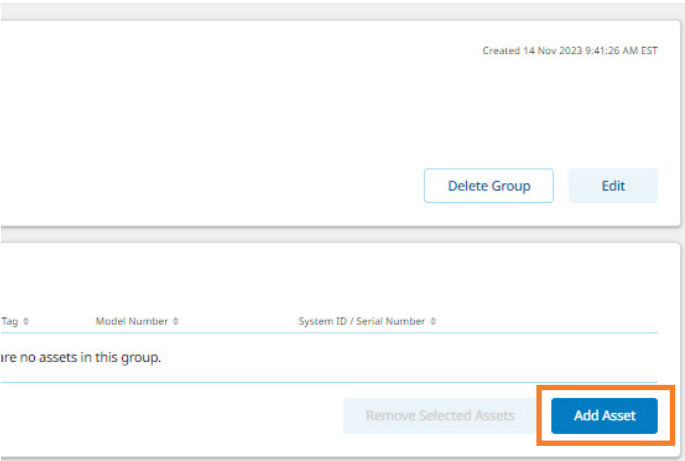


Figure 23. The Add Asset button.

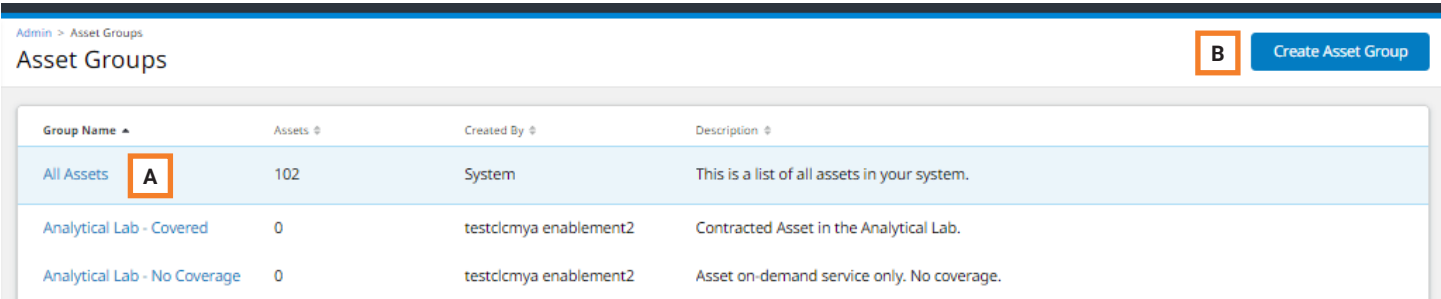


Figure 21. (A) The All Assets group. (B) The Create Asset Group button.

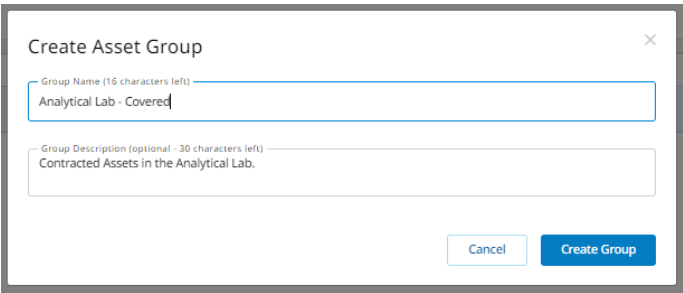


Figure 22. The Create Asset Group screen.

Type in a keyword or a serial number to bring up the asset or group of assets that should be added to the group. Select the asset (or assets) to be added to the group by checking the box to the left of the asset. To select all, click the box to the left of the column header labeled Asset. Click the **Add Asset** button on the bottom right to add all the assets selected (Figure 24).

Assets can also be grouped by Service Coverage. Click the **downward arrow** on the Service Coverage tile to expand the view (Figure 25A). Deselect All by clicking the gray box to the left of All (Figure 25B). Filter the Service Coverage of interest by clicking the corresponding box to the coverage type. The asset list is automatically updated upon selection. Click again on the downward arrow to collapse Service Coverage.

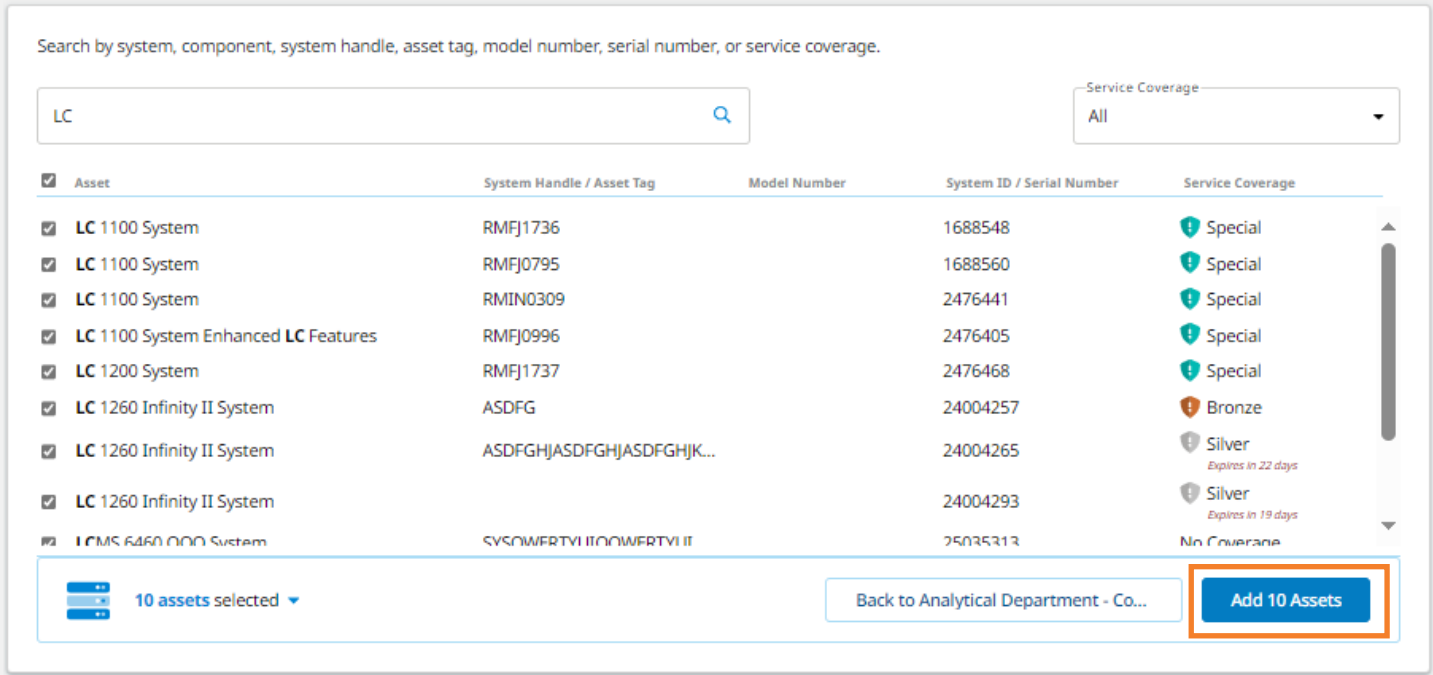


Figure 24. Updated Add Asset button.

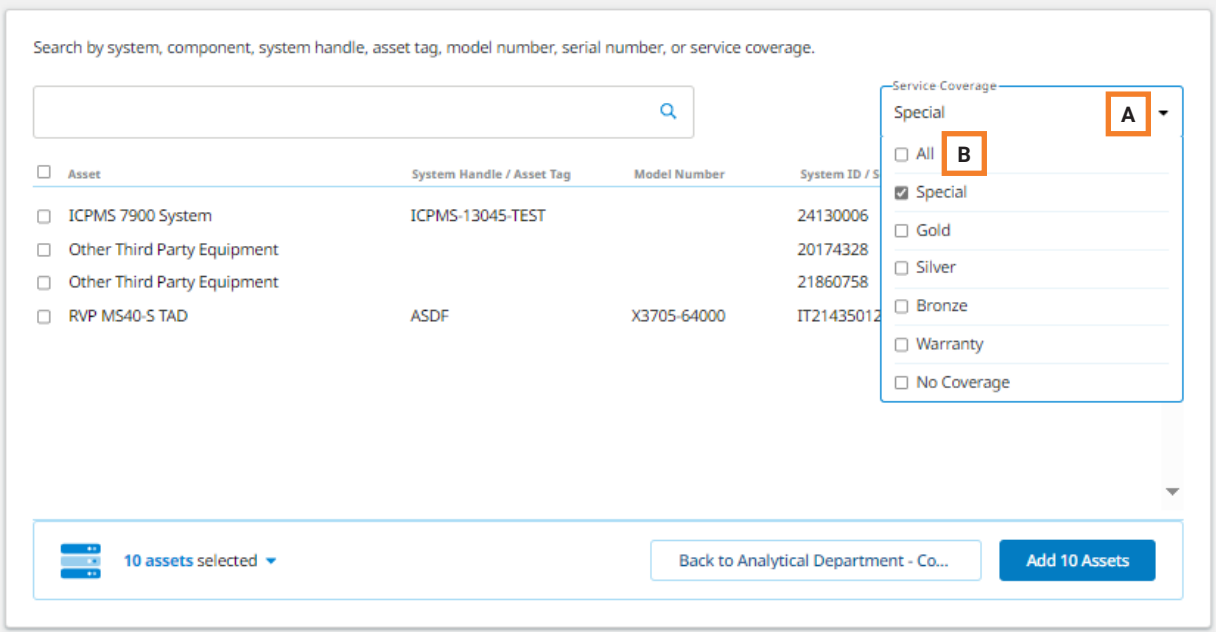


Figure 25. Group Assets by Service Coverage.

Use the links on the top left to return to the Asset Groups page to see the entire list (Figure 26).

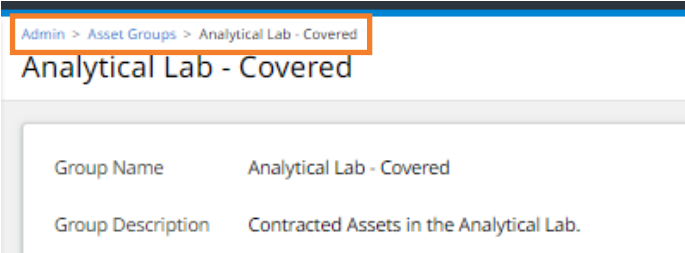


Figure 26. Link to return to the Asset Groups page.

The assets included in the group and other information about the group are shown on this page. To view the assets that are part of a group, click the group name on the Asset Groups page (Figure 27).

Group Name	Assets	Created By	Description
All Assets	102	System	This is a list of all assets in your system.
Analytical Lab - Covered	6	Jane Smith	Contracted Assets in the Analytical Lab.
Analytical Lab - No Coverage	0	testclmrya.enablement2	Asset on-demand service only. No coverage.
John's QC Lab	0	testclmrya.enablement2	John Jones QC Lab Assets.
QC Department - Covered	6	testclmrya.enablement2	Assets under contract in QC Dept.
QC Department - No Coverage	0	testclmrya.enablement2	Assets on-demand service only. No coverage.
Rachel's GMP Assets	0	testclmrya.enablement2	Rachel's GMP Asset Group.

Figure 27. Group name.

An existing group can be deleted entirely or edited by clicking the **Edit** button on the bottom right of the group (Figure 28). The name and description may be changed for this group when editing.

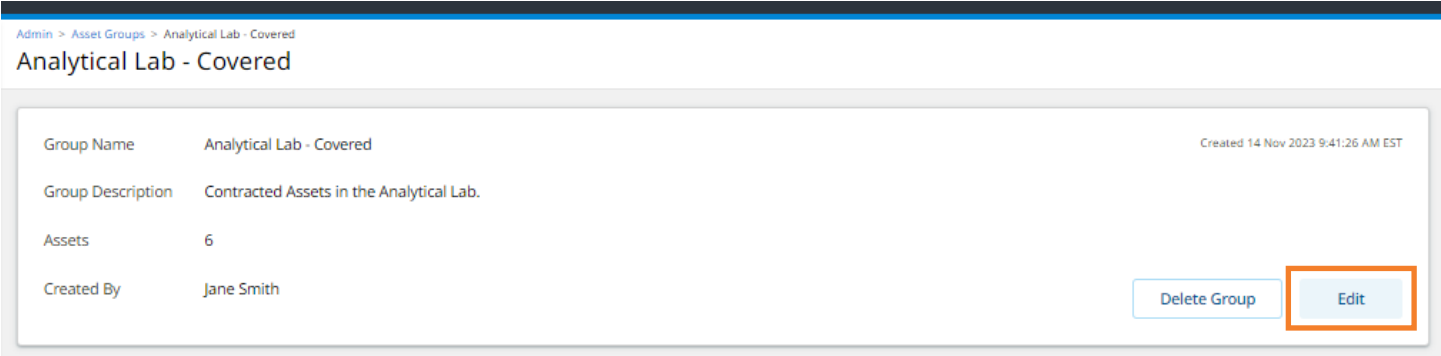


Figure 28. The Edit button.

To remove an asset from the Asset Group, select the group, scroll down to the list of assets, select the assets that need to be removed, and click the **Remove Selected Assets** button on the bottom right (Figure 29).

A pop-up window appears, requesting confirmation of the assets that will be removed (Figure 30).

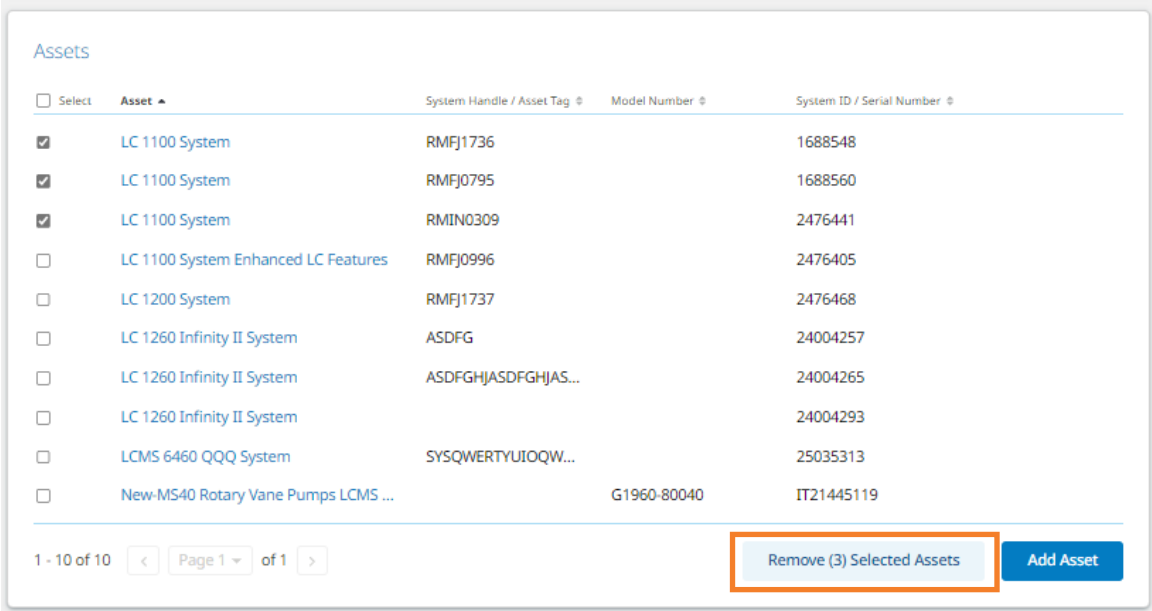


Figure 29. The Remove Selected Assets feature.

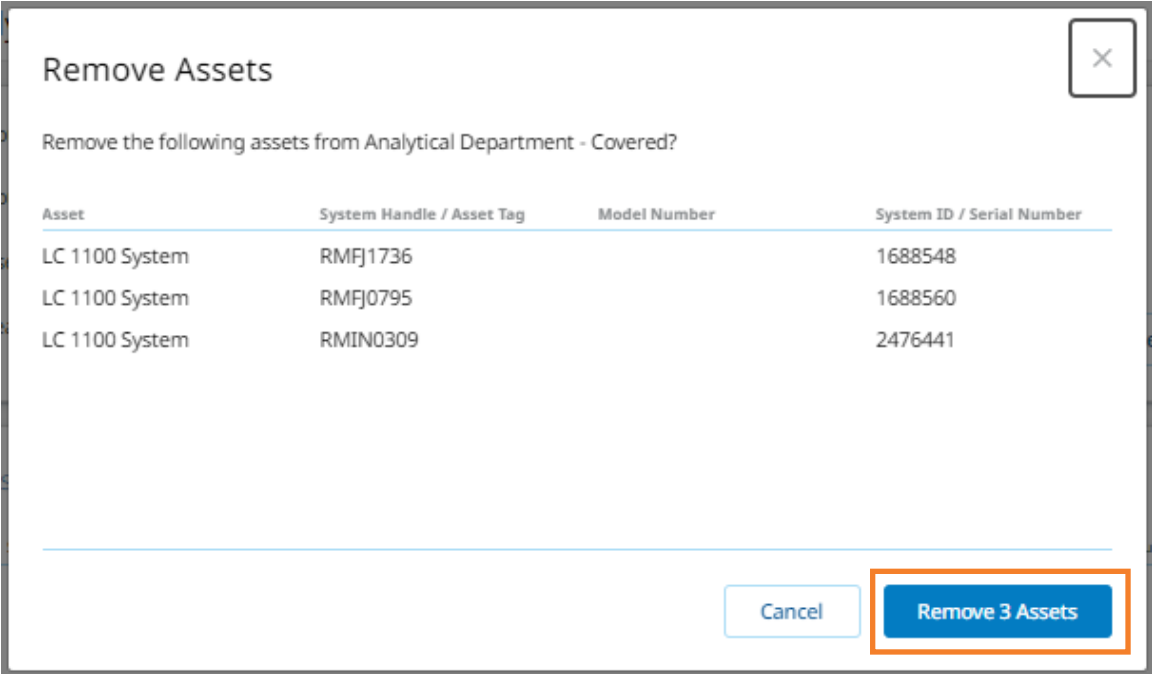


Figure 30. Remove Assets confirmation pop-up window.

When on the Service Manager page of CrossLab Connect, use the Asset Groups filter to select the Asset Group by name (Figure 31). This group selection will apply to the list of assets and be saved even after logging out and back in. To switch to a different Asset Group view, select All Assets or another Asset Group.

For questions on how to create Asset Groups or if an error is encountered, use the contact support link on the bottom of the page to request assistance (Figure 32). At the bottom of every page there is a link to request support for any issues encountered in CrossLab Connect, such as if a page does not load, if information is missing or incorrect, or if you receive an error message. Click the support link to submit a ticket to CrossLab Connect Support. You may also email crosslab.support@agilent.com for assistance.

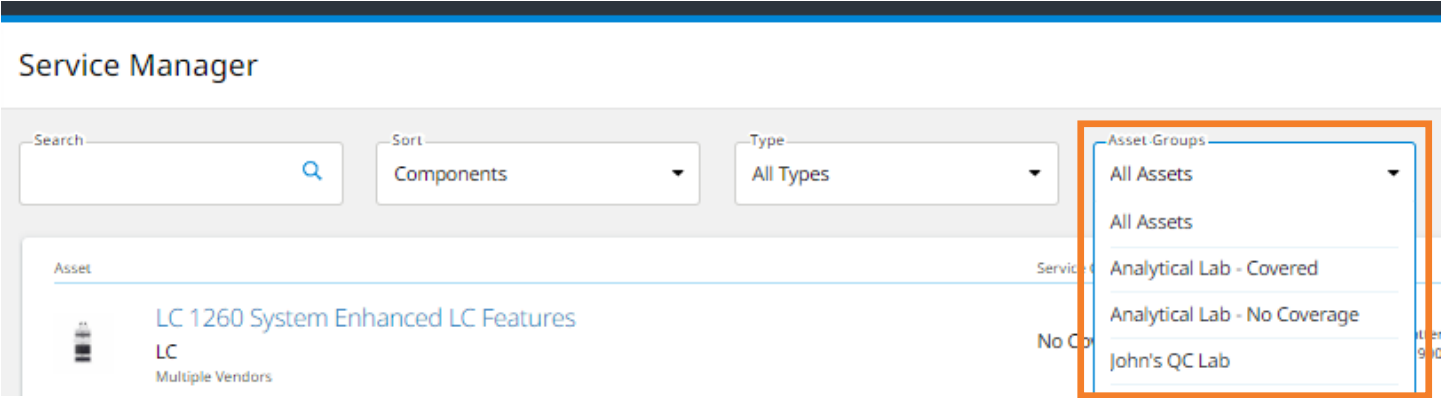


Figure 31. The Asset Groups filter.

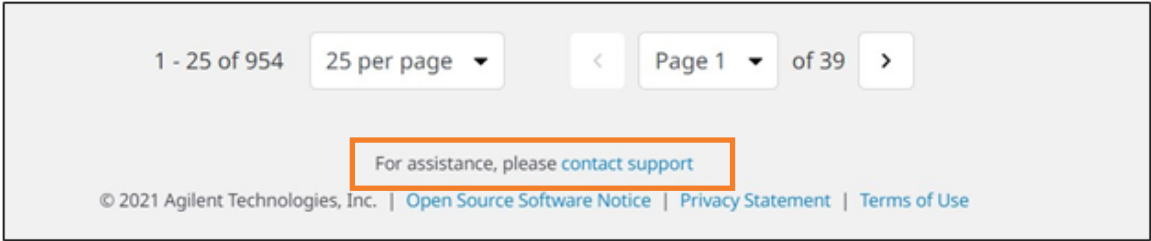


Figure 32. Location of the Agilent CrossLab Connect support link.

Asset Editing

The Asset Editing feature allows a user with Admin access in CrossLab Connect to submit proposed edits to asset attributes, such as updates to the manufacturer or instrument name, through the CrossLab Connect application. Agilent receives those proposed edits, reviews them, and updates the requested attributes as quickly as possible.

How to edit a field or attribute for an asset

From My Insights homepage, click the **Service Manager icon** on the left panel (Figure 33). In the Service Manager application, search for the asset to be updated. You may need to click **Filter/Sort** (Figure 34A) to expand the ribbon.

Click the name of an asset to open the Asset Details page (Figure 34B).

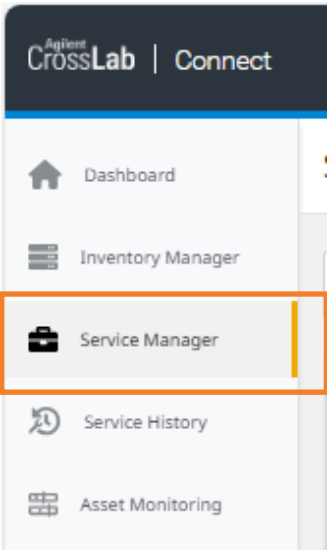


Figure 33. The Service Manager icon.

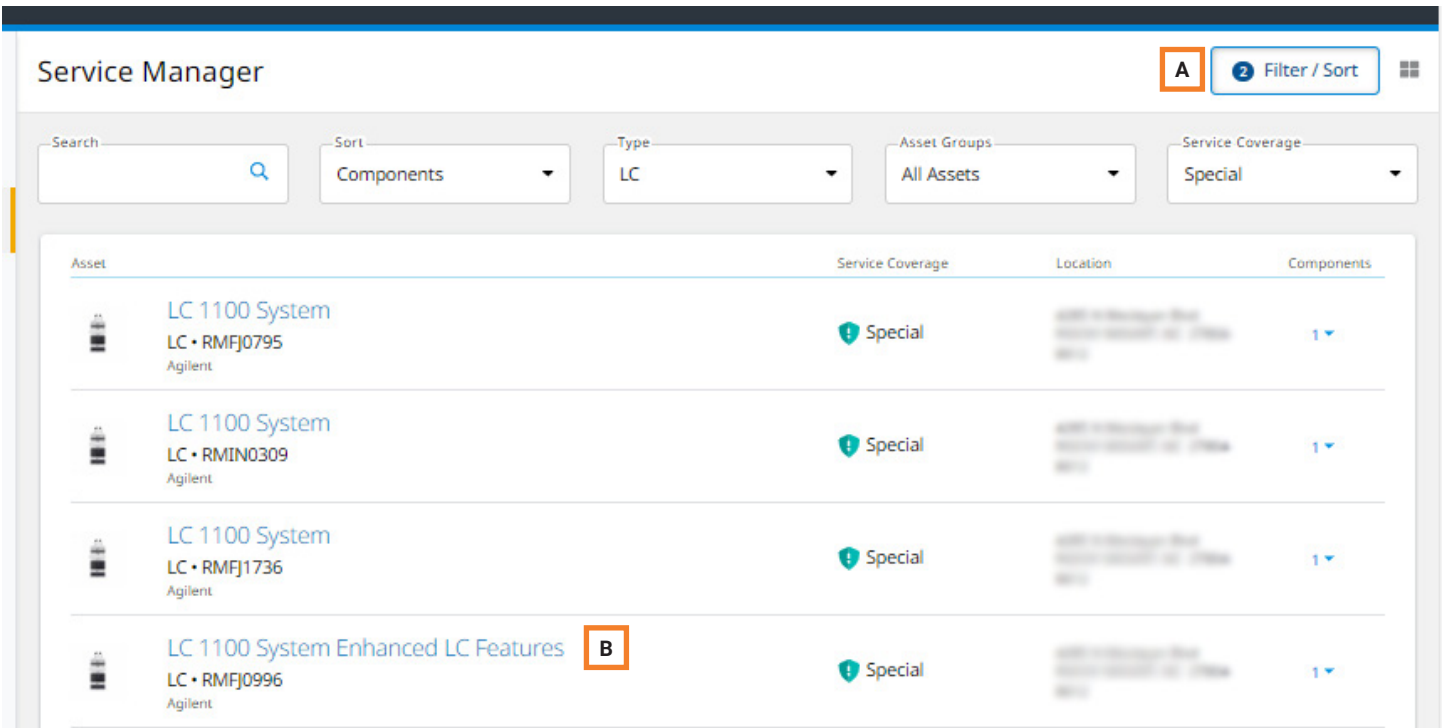


Figure 34. The Service Manager application.

On the Asset Details page, click the **Edit** button on the top right (Figure 35).
On the Asset Editing page, you can now add or update asset data (Figure 36).

When the proposed edits have been completed, scroll to the bottom of the page and click the **Submit Edits** button (Figure 37). A pop-up window showing the requested edits appears.

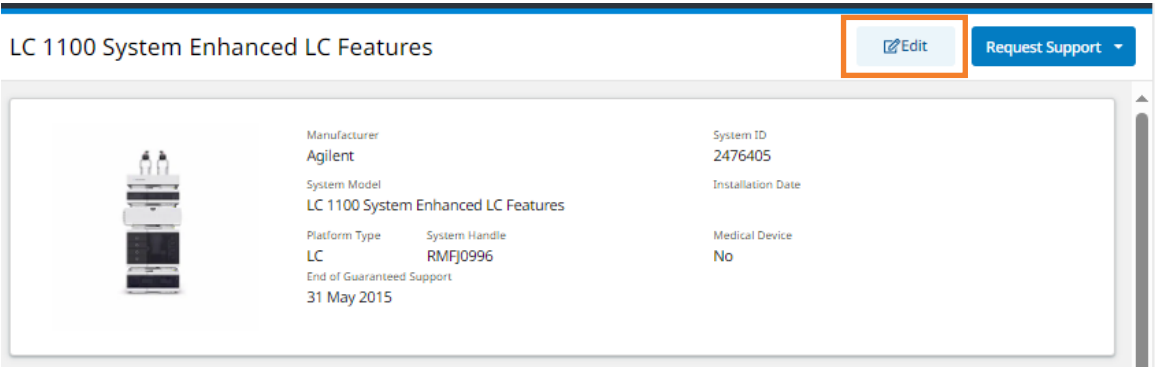


Figure 35. The Asset Details page.

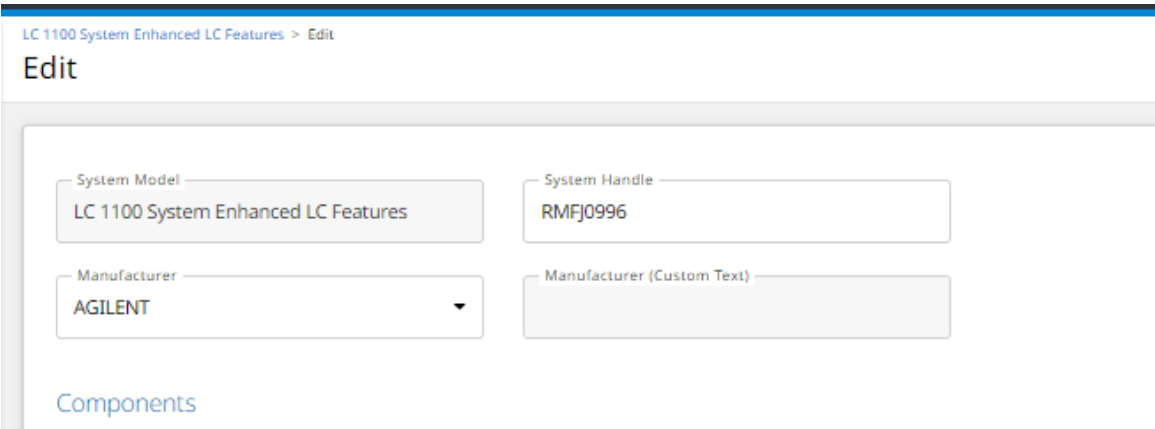


Figure 36. The Asset Editing page.

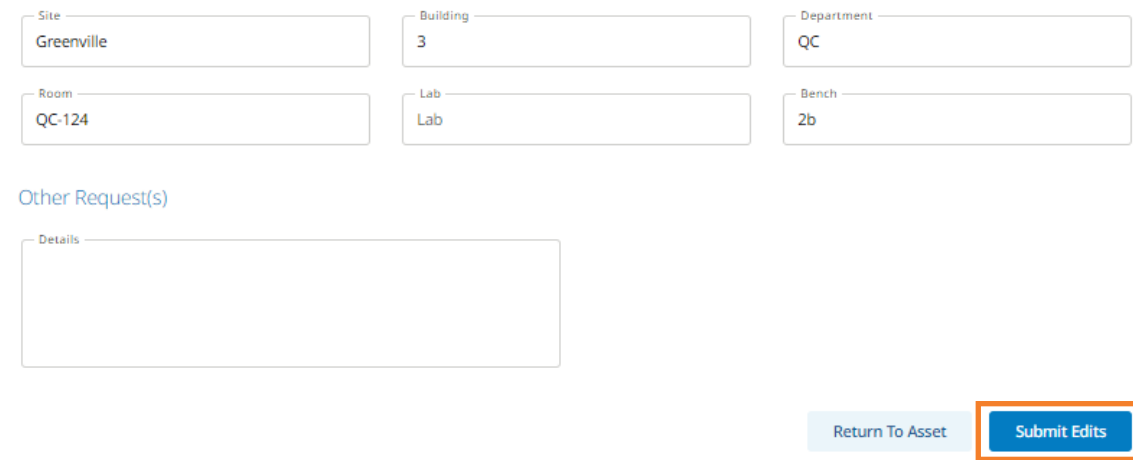


Figure 37. The Submit Edits button.

If all the edits are correct, click **Confirm** to close the window and have the proposed edits submitted to Agilent (Figure 38). A notification appears, indicating that the edits have been submitted (Figure 39).

Note: Some edits require additional review and approval from Agilent and may take more time.

Note: There is a limit of five edits that a user can make in a 15-minute period. The limit is per user, not per asset (Figure 40).

Changes requested for this asset

Please confirm the changes you are requesting for this asset

Asset Information

Bench	Empty	→	2b
Room	CQ-124	→	QC-124
Department	Empty	→	QC
Building	Empty	→	3
Site	Empty	→	Greenville

Component DE11103066

Asset Tag	Empty	→	D-12
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Return to Form

Confirm

Figure 38. The Confirm button.

LC 1100 System Enhanced LC Features

Edit

Request Support

⚠ There are changes pending on this asset.

View Changes

✔ The changes you requested have been successfully submitted. Please allow 30 days for these changes to appear.

×

Figure 39. Successful request notice.

LC 1100 System Enhanced LC Features > Edit

Edit

✖ You have reached the limit for submitting asset edits. Please wait at least 15 minutes before submitting more edits.

×

Figure 40. Request limit warning.

Recent Changes For This Asset window

- 1. There will be a notification to view recent changes made by you or any other admin user for an asset on the Asset Details page. Click **View Changes** to review the pending change requests for the asset (Figure 41).
- 2. A Recent Changes For This Asset window showing the change requests for the asset will pop up displaying the item (or items) that was requested for editing. The window

displays the original text in the field, the requested change, as well as the date, time, and submitter of the requested edit(s). This information is displayed for all pending edits and for completed and rejected edits in the past seven days. For rejected edits, the reason the edit was rejected is also provided for reference. Click the **Close** button to close the box (Figure 42).

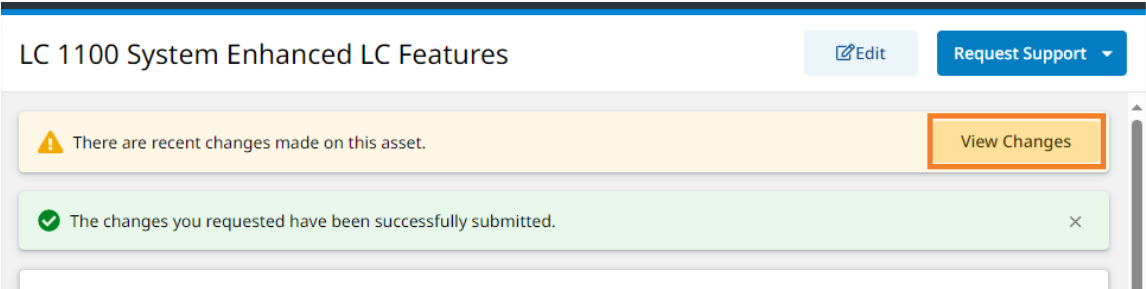


Figure 41. Recent changes notice.

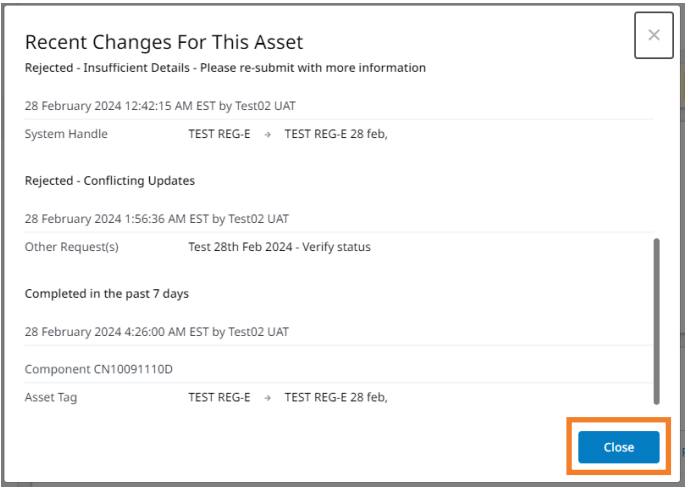


Figure 42. The Recent Changes For This Asset pop-up window and Close button.

Admin features within Inventory Manager

Inventory Manager allows users and Admins to view asset locations hierarchy, the distributions graph, and the asset table. From the Admin icon (Figure 1), Inventory Manager Admin privileges can be accessed, enabling CLC Admins to customize these graphs and tables for all users to reflect their laboratory structure or to display select asset data fields of interest. CLC Admins can customize the asset table with the Inventory Table View tile and locations hierarchy through the Inventory Locations tile (Figure 43).

To customize the view of asset data in the Asset Table, click **Inventory Table View Tile** on the Admin page.

The asset table can be modified on the Asset Table View page, shown in Figure 44. The top section under Displayed Columns (Figure 44A) displays the columns that will be present in the table and the order in which they will appear. To remove a column, click the corresponding green box under Displayed Columns, and it will move to the bottom section

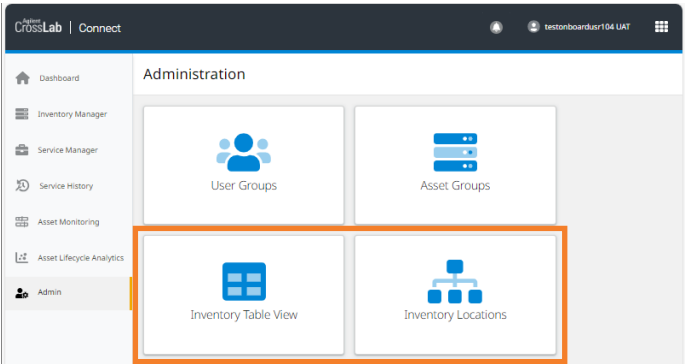


Figure 43. Inventory Manager customization tiles for Admins.

called Hidden Columns (Figure 44B). To change the order of the columns displayed in the asset table, drag the column name to the location within the column list where you wish it to be displayed. For example, in Figure 44C, if "Asset Tag" should be the second column in the table, click Asset Tag and drag it between System Handle and System Model.

Scroll to the bottom of the page and click **Save Changes** (Figure 44D).

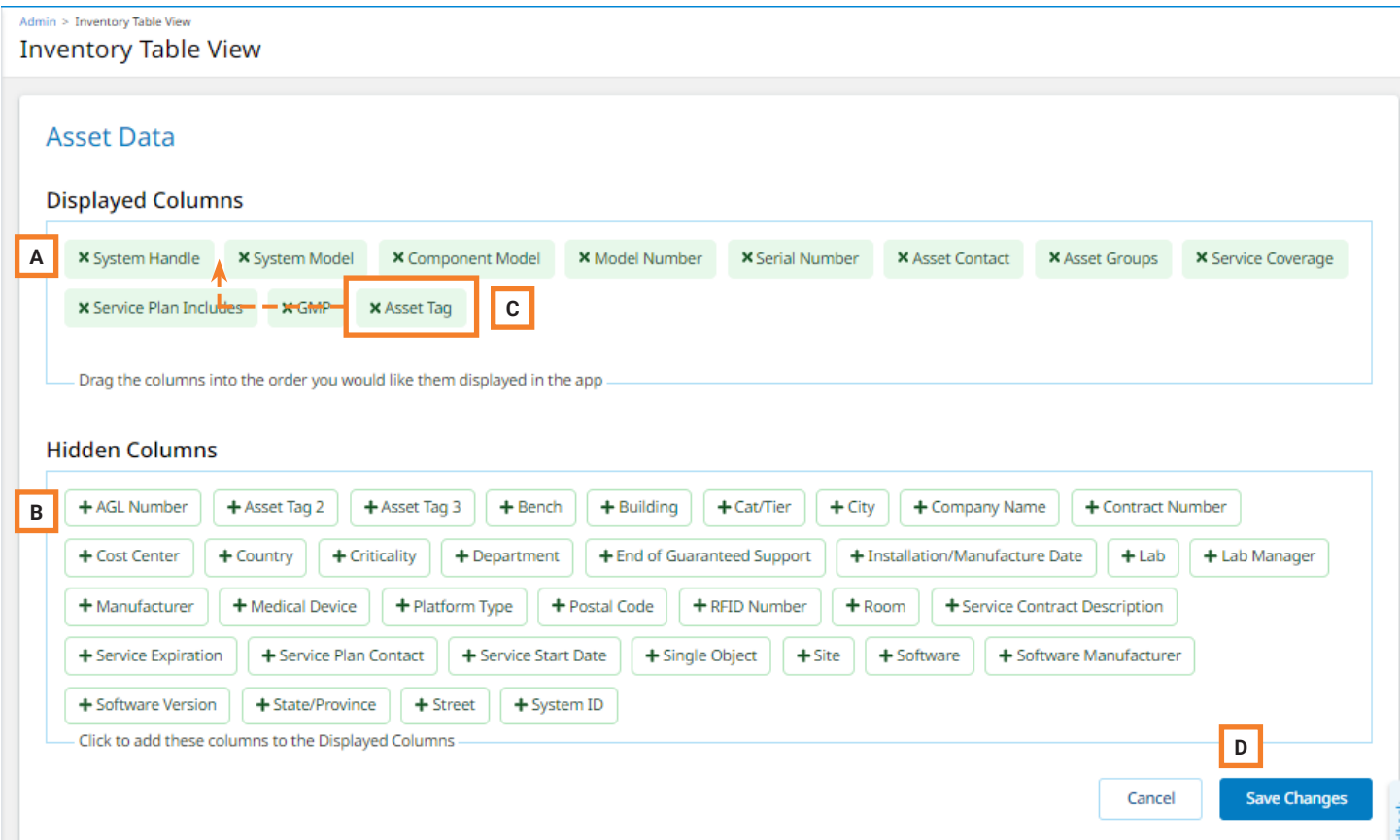


Figure 44. The Asset Table View page.

To modify the locations on the Inventory Manager page, first click **Inventory Locations** on the Admin page (Figure 43).

On the Inventory Locations page, you can customize how your locations are organized. The default is: Building → Room. There are four nodes, or location options, that can be displayed on the Inventory Locations page (Figure 45).

To remove a node, click the **X** on the top right of the node. To add, click **+Add** to add nodes that have been removed (Figure 46A). No additional locations can be added beyond the four nodes.

To inform the order of the locations displayed on the Inventory Locations page, click the drop-down arrow to the right of the text. You can select the location you wish to have shown first, second, third, and so on (Figure 46B). The screen will display duplicates until you update all the nodes to a different location. You cannot save the changes until your duplicate locations are removed. Once the locations are organized, click **Save Changes** on the bottom right (Figure 46C).

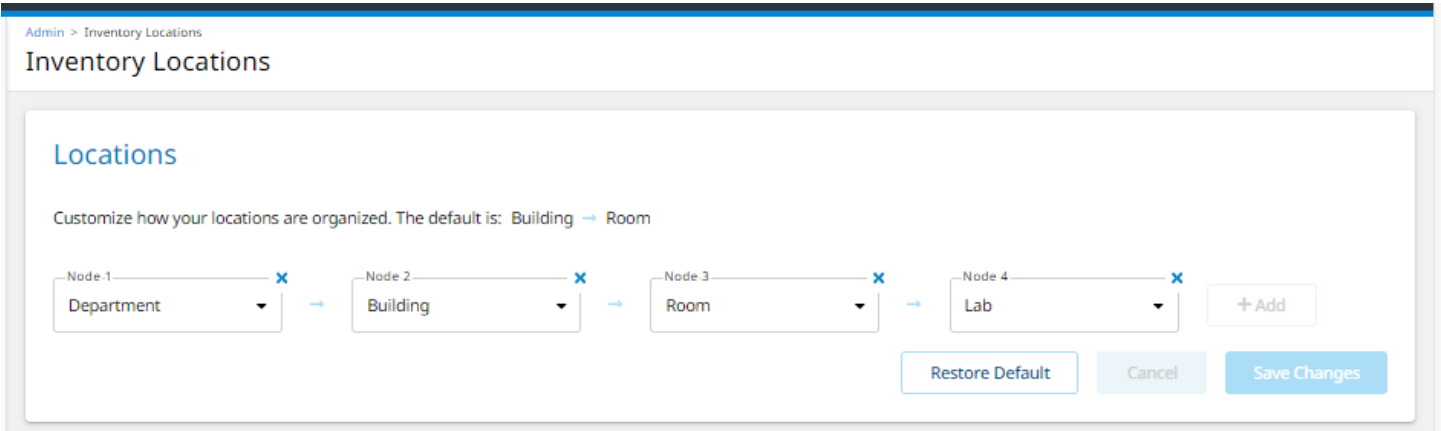


Figure 45. The Inventory Locations Page.

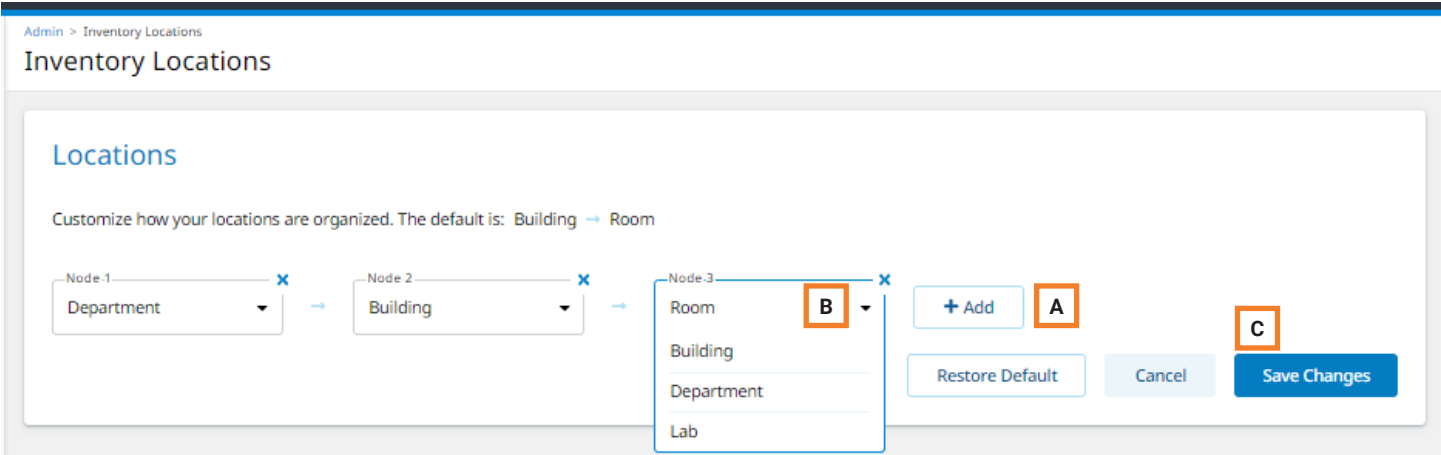


Figure 46. Drop-down box to customize locations.

Archive Asset

Admins can manually archive assets that are no longer part of their active instrument fleet by selecting the **Archived Assets** tile on the Administration page (Figure 47). The Archived Assets feature will remove the assets from their asset lists so that they are no longer visible in Inventory Manager, Service Manager, and the corresponding My Insights. Service requests against archived assets are not displayed in Service History. You can see and manage archived assets in the Administration section. Assets can be unarchived to reappear across CLC applications.

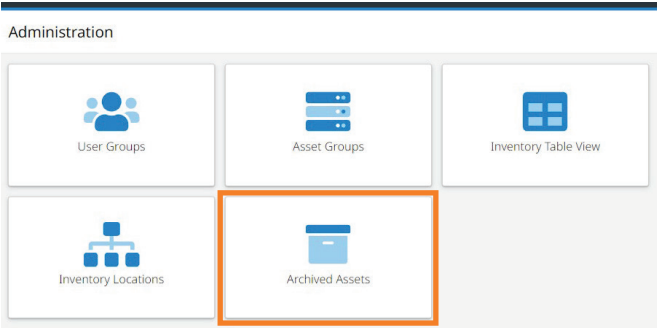


Figure 47. The Archived Assets tile on the Administration page.

To archive an asset, click the **Archive Assets** button on the top right of the Archived Assets page (Figure 48).

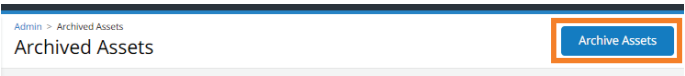


Figure 48. The Archive Assets button on the Archived Assets page.

Archiving assets mirrors existing asset grouping functionality (page 11). Search an asset to archive by typing in a keyword or a serial number. This will automatically filter the list of assets. The Service Coverage filter is also available to aid in identifying inactive assets, often not covered by contract. Select the asset (or assets) to be archived by checking the box to the left of the asset. To select all, click the box to the left of the column header labeled Asset. Click the **Archive Assets** button on the bottom right to add the assets to the archive (Figure 49).

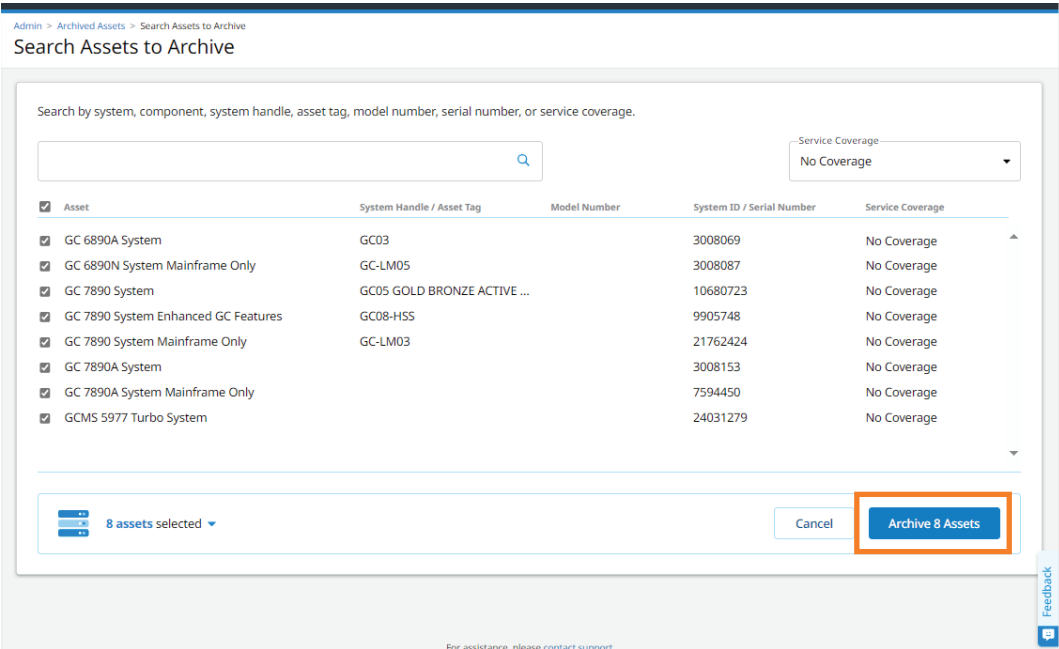


Figure 49. The Archive Assets button on the Search Asset to Archive page.

When archiving assets, you will be asked to provide a reason. Select the reason or use the text box to populate Other Reason. When you select "Sold or donated" or "Destroyed," you allow Agilent to permanently remove those assets from your accounts. By understanding why you are choosing to archive assets, Agilent can aid in improving your data quality across CrossLab Connect. Select **Confirm** to complete the archiving of assets and return to the Archived Assets page (Figure 50).

Archive Assets

⚠ Archived assets and associated service requests will be removed from other parts of the application. You can still see and manage archived assets in the Administration section.

⚠ When you select "Sold or donated" or "Destroyed," you allow Agilent to permanently remove those assets from your account.

Why do you want the selected assets archived?

☒ Sold or donated

☐ Destroyed

☐ Not in use / In storage

☐ Other

Other Reason (25 characters left)

Cancel

Confirm

Figure 50. The Archive Assets button on the Search Asset to Archive page.

From the Archived Assets page, you can update the reason you chose for archiving certain assets by selecting the assets and clicking **Update Reason** (Figure 51).

Unarchive (1) Selected Asset

Update Reason

Figure 51. The Update Reason button on the Archived Assets page.

Similarly, you can unarchive an asset (or assets) by selecting the assets you want to unarchive and clicking **Unarchive Selected Asset**. To unarchive all assets, select all by clicking the box to the left of Select, at the top of the table (Figure 52).

Admin > Archived Assets

Archived Assets

Archive Assets

✔ 3 assets were archived.

Archived Assets

<input type="checkbox"/> Select	Asset	Model Number	System ID / Serial Number	Archived On	Archived By	Reason
<input checked="" type="checkbox"/>	6890 Plus GC system	G1530A	US00000569	31 Jan 2024	Jane Moneypenny	Sold or donated
<input type="checkbox"/>	6890 Plus GC system	G1530A	US00000862	31 Jan 2024	Jane Moneypenny	Sold or donated
<input type="checkbox"/>	6890N Network GC System	G1530N	CN10543069	31 Jan 2024	Jane Moneypenny	Sold or donated

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Unarchive (1) Selected Asset

Update Reason

Figure 52. The Unarchive Selected Asset button on the Archived Assets page.