# myLab User Guide: Basics of getting started with myLab and navigating the myLab interface (New Web Version)

Last Updated: February 21, 2023

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### **Introduction**

**myLab** is the web component of the McGill Hazardous Material Management System (HMMS). This system facilitates the management of hazardous materials, consisting of **Radioactive materials** (RAM/RAD), and **Hazardous chemicals** (CHEM) from acquisition to its disposal.

**myLab** allows McGill researchers, students, laboratory workers and the university services staff to work with electronic inventories of hazardous materials in McGill laboratories. This includes the following functions:

- Reception of RAM/RAD and CHEM purchases
- Inventory and disposal records
- Waste pickup
- Training records
- Laboratory inspections
- Applications and permits for use of hazardous materials at McGill
- Emergency response reports

#### **Getting Started**

#### RAD Users only - Obtaining a Permit

- Researchers must possess an internal McGill permit to acquire, store and use radioisotopes at McGill University.
- To receive a permit, complete the Application to use Radioactive Materials form.
- You will receive your permit number and its details by e-mail.

#### Access to myLab

**Principal Investigators (PIs)** are automatically granted full access to mylab for all functions relating to their active permit(s).

Aside from PIs, all other users must be authorized to access myLab. Send access requests to: myLab.ehs@mcgill.ca

There are two types of user accounts to access myLab:

- 1. Full access accounts: Allows users to **view, receive, and modify** items in the full inventory and access SDS documents for CHEM Users
- 2. Read-only access accounts: Allows users to **view** the full inventory and access SDS documents for CHEM Users



#### Security protocols

ALL users logging into the myLab Web Application must do so using their Active Directory @mcgill or @mail.mcgill email credentials (the same as you currently use to login to Windows).

Individual (named user) login will:

- 1. Secure access to the application
- 2. Introduce a single-sign on (SSO) user experience
- 3. Facilitate provisioning access
- 4. Enhance auditing data (specifically who is viewing or editing what)



If you use a shared computer to access myLab, you must login to the computer with your own credentials and completely logout of the computer before the next user assumes control.

#### Purchasing & the McGill MarketPlace (MMP)

- Instructions on how to access and use MMP are available on the Procurement Services website.
- Once materials have been purchased through MMP, the itemized list of products is transferred to myLab for receipt/addition to your lab inventory.

#### **CHEM Users**

Chemicals may be purchased from **any source** and/or vendor. We recommend you make your chemical purchase through the McGill MarketPlace (MMP).

For items purchased through means other than MMP, you must manually enter all of the chemical's details into the myLab inventory.

#### McGill RAD Users

At McGill, **ALL** hazardous materials must be purchased through the **McGill MarketPlace** (MMP) system.

To place an order through MMP, you must have a valid **permit** (see above).

## myLab Basics - New Web Version

#### Logging into myLab



If you use a shared computer to access myLab, you must login to the computer with your own credentials and then completely logout of the computer before the next user assumes control.

- 1. Access myLab through <a href="https://mylab.mcgill.ca">https://mylab.mcgill.ca</a>
- 2. If prompted, enter your McGill username and password
  - o myLab is part of Single Sign On (SSO). If you are already logged in to another application which uses SSO, you will NOT be prompted to log-in.

# Note (

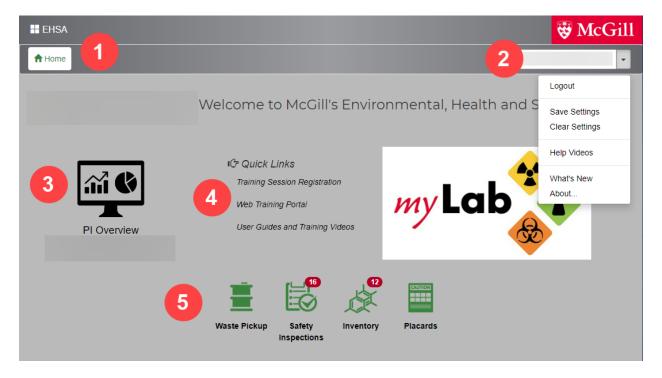
If off-campus, you must be connected to McGill's VPN to access myLab

- For instructions on installing and launching the VPN, refer to this knowledge base article: <a href="https://mcgill.service-now.com/itportal?id=kb">https://mcgill.service-now.com/itportal?id=kb</a> article&sysparm article=KB0010687
- For any problems connecting to the VPN, contact the IT Service Desk (login to start a chat): https://mcgill.ca/itsupport



#### myLab Homepage

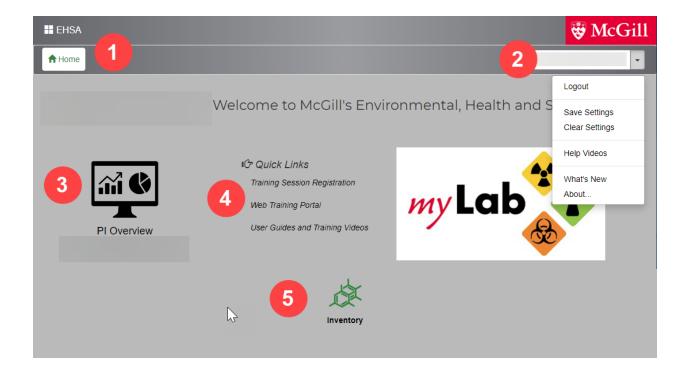
#### **CHEM Users & McGill RAD Users**



- 1. Click EHSA or Home within any module to return to the myLab homepage
- 2. Your name (the person logged into the system) is displayed + click on the down arrow next to the field to see additional menu items/actions to take [displayed on the homepage and menu screen of all modules]:
  - o To exit myLab, select **Logout**
  - If customizations have been made to on-screen listings/grid layout and you would like to save these settings, select Save Settings (more information)
  - o If customizations have been made to on-screen listings/grid layout and you would like to revert to myLab default settings, select **Clear Settings** (more information)
- **3. PI Overview** click PI Overview to view information about permits, training, lab/room maps (*if available*), and inspection results (<u>more information</u>)
- **4.** Click on a link to register for training, access the web training portal (courses), or visit the IT Knowledge Base article with myLab user guides and training videos
- **5.** Modules you have access to as a CHEM or RAD User (*screenshot is an example of a CHEM User*) click on an icon to open the module (more information <u>CHEM modules explained</u> | <u>RAD modules explained</u>)



#### **MUHC RAD Users**



- 1. Click **EHSA** or **Home** within any module to return to the myLab homepage
- 2. Your name (the person logged into the system) is displayed + click on the down arrow next to the field to see additional menu items/actions to take [displayed on the homepage and menu screen of all modules]:
  - To exit myLab, select Logout
  - If customizations have been made to on-screen listings/grid layout and you would like to save these settings, select Save Settings (more information)
  - If customizations have been made to on-screen listings/grid layout and you would like to revert to myLab default settings, select Clear Settings (more information)
- **3. PI Overview** click PI Overview to view information about permits, training, lab/room maps (*if available*), and inspection results (<u>more information</u>)
- **4.** Click on a link to register for training, access the web training portal (courses), or visit the IT Knowledge Base article with myLab user guides and training videos
- **5.** Modules you have access to as a MUHC RAD User click on an icon to open the module (more information RAD modules explained)



#### PI Overview explained - CHEM Users, McGill & MUHC RAD Users

On the myLab homepage, click PI Overview to view information about permits, training, lab/room maps, and inspection results for yourself/PIs you have access to view.

- 1. To view a listing associated to a different PI click the down arrow next to the displayed name and make a selection
- 2. Click on a section name (grey button) to view related information



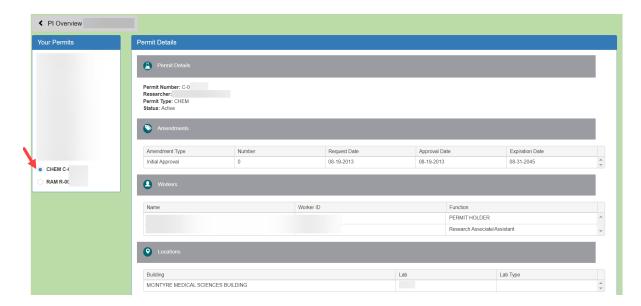
Within any of these sections, hover over the PI Overview button to select a different menu option OR click the button itself to return to the main PI Overview screen



4. From the PI Overview screen, click EHSA (top left corner) to return to the myLab homepage.

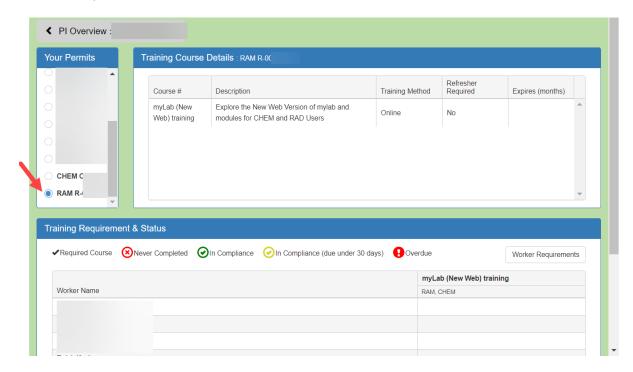
#### Sections:

■ **Permits** – Select a permit from the listing of **Your Permits** on the left-side of the screen (click the radio button/circle before the permit number) to view associated permit details, lab locations, items currently in your inventory and possession limits, amendments, workers, and/or meters (*if applicable*). If any of the information is incorrect, contact your Safety Officer (EHS Contact Us).

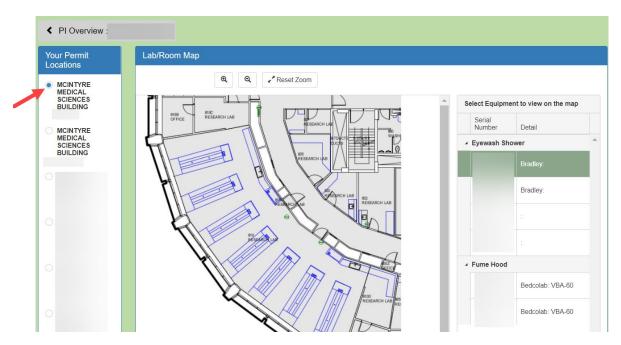




Training - Select a permit from the listing of Your Permits on the left-side of the screen (click the radio button) to view associated training course details, and a dashboard of training requirement and status by worker.

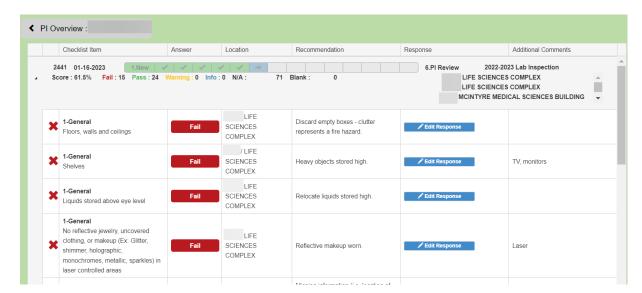


Lab/Room Maps – Select a location from the listing of Your Permit Locations on the left-side of the screen (click the radio button next to it) to view associated lab/room maps (if available – information comes from e-space), with a listing of equipment





■ Inspection Results — View a listing of inspection results in a dashboard format. You have the option to respond to a violation from this screen by clicking on the *Edit Response* button — this will bring you to the same screen you may access from the *Uncorrected Inspection Violations* menu item in the *Safety Inspections module*.



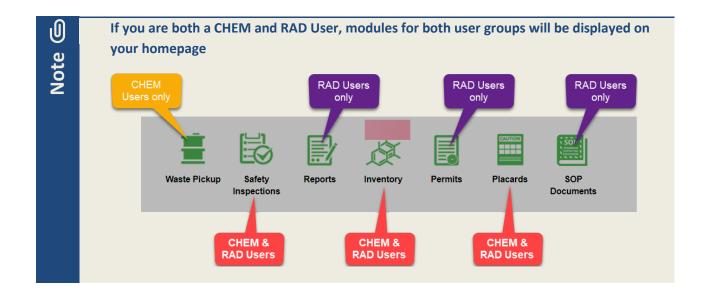
#### CHEM modules explained

Modules you have access to as a CHEM User – click on an icon to open the module



Module	Used for
Waste Pickup	<ul> <li>Requesting a waste pick-up by recording the contents of containers</li> <li>Editing or deleting a waste pick-up with the status "Not Completed"</li> </ul>
Safety Inspections	<ul> <li>Responding to an inspection violation for a lab or fume hood</li> <li>Viewing completed lab or fume hood inspections (inspection history)</li> </ul>
Inventory	<ul> <li>Viewing a listing of inventory items (current, disposed, by lab location)</li> <li>Adding, updating, removing and transferring items within your inventory</li> <li>Requesting and approving chemical transfers for shared chemicals within your Department</li> <li>Viewing Safety Data Sheets (SDS)</li> <li>Viewing chemical inventory reports</li> </ul>
Placards	<ul> <li>Editing lab information cards (LIC)</li> <li>Printing lab information cards (LIC)</li> </ul>

User Guides are available in the IT Knowledge Base.



#### RAD modules explained

Modules you have access to as a RAD User – click on an icon to open the module



Module	Used by & Used for
Safety Inspections	<ul> <li>McGill Users only</li> <li>Responding to an inspection violation for a lab or fume hood</li> <li>Viewing completed lab or fume hood inspections (inspection history)</li> </ul>
Reports	<ul> <li>McGill Users only</li> <li>Viewing training due and training history for workers associated to a Principal Investigator (PI)</li> </ul>
Inventory	<ul> <li>McGill &amp; MUHC Users</li> <li>Adding new radioactive materials to your inventory</li> <li>Recording results of performed wipe tests upon receipt of items</li> <li>Recording the usage of radioactive materials in your inventory</li> <li>Preparing a container for waste pick-up - closing a container + recording results of a performed wipe test + selecting a temporary waste area where the container will be dropped off</li> </ul>
Permits	<ul> <li>McGill Users only</li> <li>Viewing radioisotopes possession and purchase limits, workers, labs, amendments, conditions, permit history, protocols, meters/instruments, documentation, training profile, and accounts associated to your RAM permits</li> </ul>
Placards	<ul> <li>McGill Users only</li> <li>Editing lab information cards (LIC)</li> <li>Printing lab information cards (LIC)</li> </ul>
SOP Documents	<ul> <li>McGill Users only</li> <li>Uploading and viewing standard operating procedures (SOPs) associated to your lab</li> </ul>

User Guides are available in the <u>IT Knowledge Base</u>.

#### If you are both a CHEM and RAD User, modules for both user groups will be displayed on Note @ your homepage RAD Users RAD Users RAD Users only only only Waste Pickup Reports Inventory **Permits** SOP Inspections **Documents** CHEM & CHEM & CHEM & RAD Users **RAD Users** RAD Users

#### **Basic Navigation**

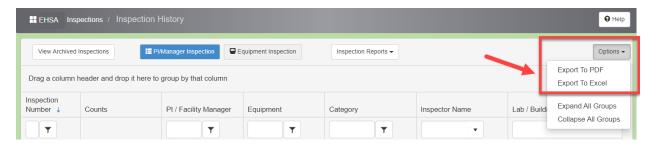
#### Help

When displayed, the Help button (top right corner), links to EHSA documentation provided by the Vendor (OnSite). Customized McGill documentation is available in the IT Knowledge Base.



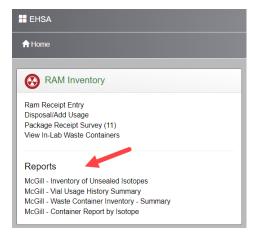
#### Screen export (Options) vs McGill customized reports

When displayed, the **Options** button (top right corner), allows for exporting information displayed on the screen to PDF or Excel (more information).



#### These are NOT formal reports. McGill custom reports may appear in two places:

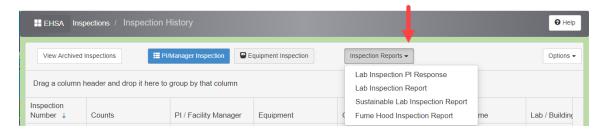
1. Menu screens within a module may list available reports below the menu items. Example: Inventory menu screen





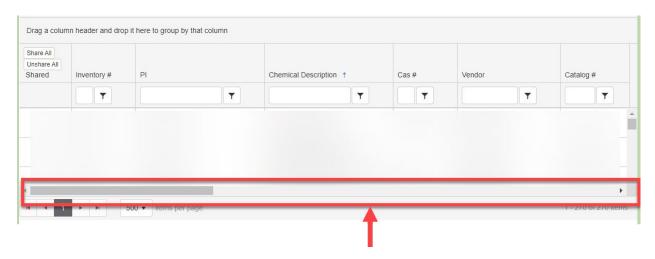
2. Within menu items of a module, a *xxxx Reports* button may be displayed near the top of the screen – click the down arrow to make a selection.

Example: Inspection Reports



#### Scrolling in a grid view

Within menu items of a module, information is often displayed in a grid view. Scroll to the right to see all available columns of information.





Columns may be filtered and re-arranged to display in a different order. Displayed information may also be grouped by a column.

**More information** 

#### Returning to the menu screen within a module

To return to the menu screen within a module, click the module name or EHSA displayed in the top left corner



#### Returning to the homepage of myLab

To exit the menu screen within a module and return to the myLab homepage, click the Home icon in the top left corner



#### Logging out of myLab

To logout of myLab, on any menu screen where your name is displayed (top right corner), click the down arrow next to your name and select **Logout** from the displayed options.





If you used a shared computer to access myLab, you must logout of the computer as well. It is not enough to just logout of the myLab Web Application.

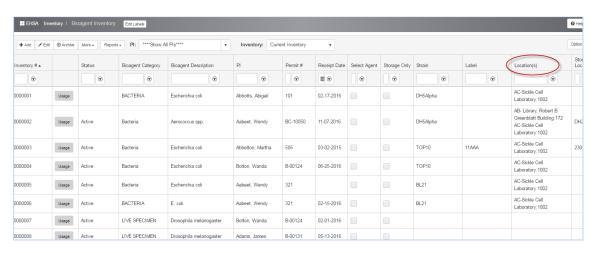
# Additional Help - New Web Version: Display options, exporting screen data, and saving customized settings

#### Customizing column order an any grid view screen [OnSite Systems help]

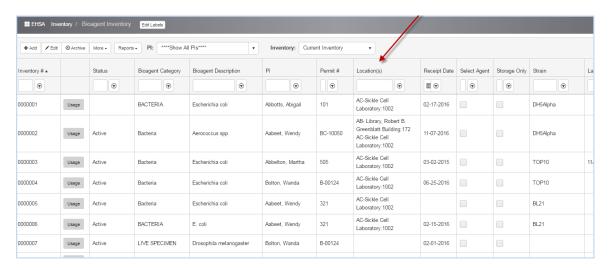
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Users can rearrange the display order (left to right) of the columns on any grid view screen

For example, when opening the Bioagent Inventory screen, the view appears as shown below.



- A. Click on a column header and drag it to a new position to rearrange the view. For example, click on the **Location** header above and move between **Permit** # and **Receipt Date** columns.
- B. The view will now display the Location column in the position selected as shown below.





#### Sorting, grouping, and filtering a grid view/on-screen listing [OnSite Systems Help]

 $\label{lem:copyright} @ < 2016, 2017, 2018, 2019, 2020, 2021, 2022 > by < On Site Systems >. All Rights Reserved. From Inspection Results - https://dmylab.it.mcgill.ca/EHSA/help/site/inspectionlist.html$ 

There are various ways to make the data easier to view. Any on-screen list can be sorted by clicking on the column header. Click and drag a column header to the left or right to rearrange the horizontal view order. The data can also be grouped by the column header fields. Use filters for column data in columns to view specific

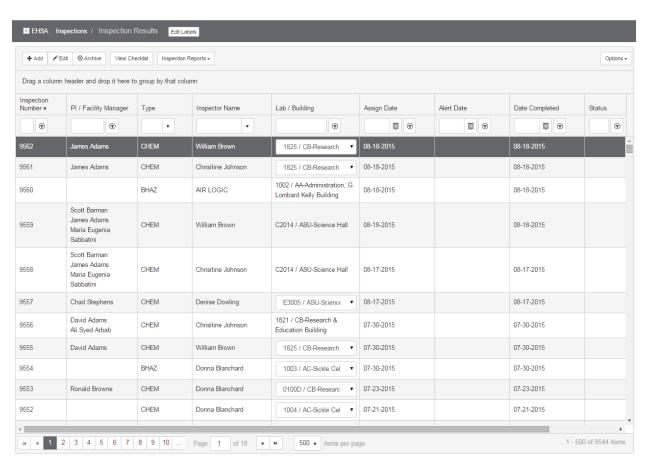
#### Sorting: Click on any column in the header row to sort by that column

An upward arrow indicates the sort is A-Z, oldest to newest, 1 to 10, etc.

Assign Date ▼

Type ▲

A downward arrow indicates Z-A, newest to oldest, etc.

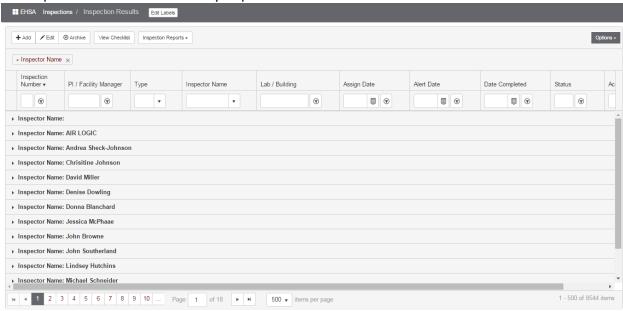




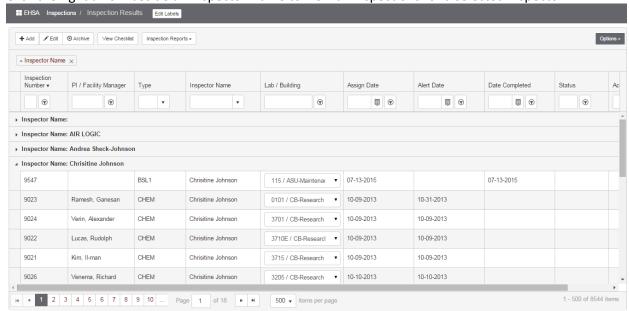
#### Grouping: Drag a column header to the area above the header row to group by that column

To group by column, click and drag a header label to the area above the header row.

The inspection list below is sorted by Inspector Name.



Click the right arrow beside an Inspector Name to view all inspections for a selected inspector.



Click the "x" on the label to remove the grouping:

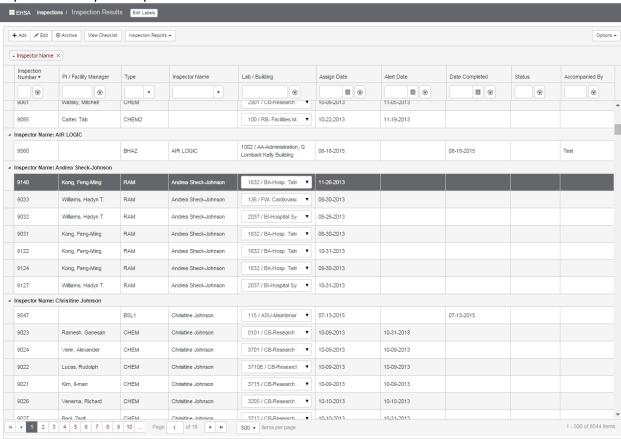




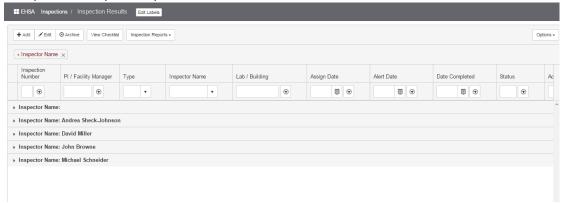
Use Expand All Groups or Collapse All Groups to view details or groups – found in the Options dropdown in the upper right corner of the screen allows



#### Expand all Groups example:



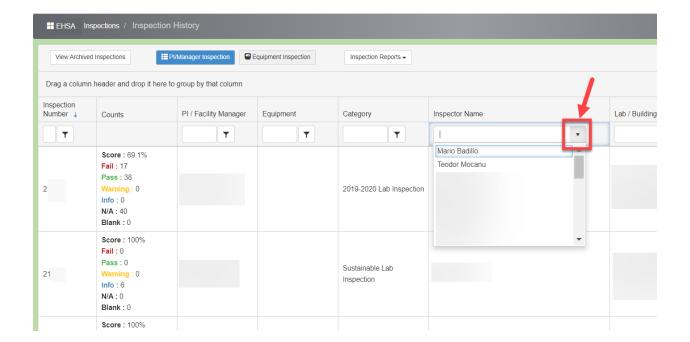
#### Collapse all Groups example:



#### Dropdown: Use a dropdown to narrow down the results on screen

Dropdown lists are available for fields such as Inspector Name.

Make a selection in the dropdown to filter displayed information.

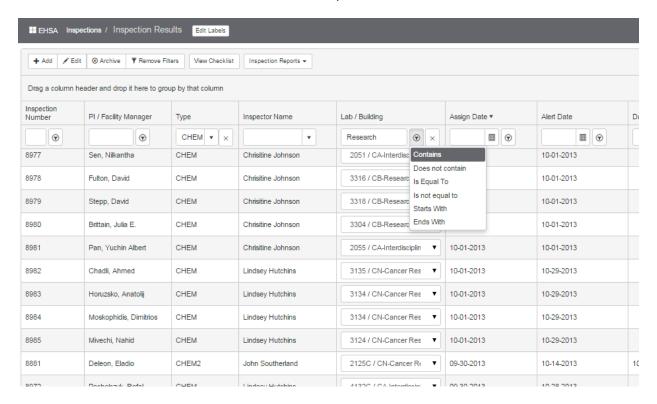


Click the "x" to remove the filter:

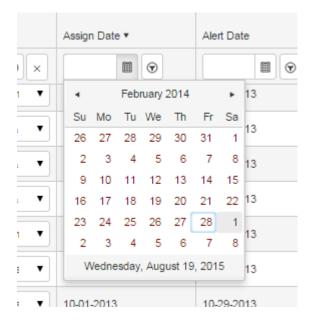


#### Filter: Use a filter to narrow down the results on screen

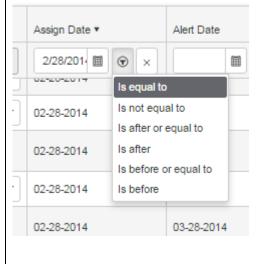
Use a Filter to narrow down the results on screen. Filter options will be available when the user clicks the down arrow on the Filter box. The default filter option is "Contains".



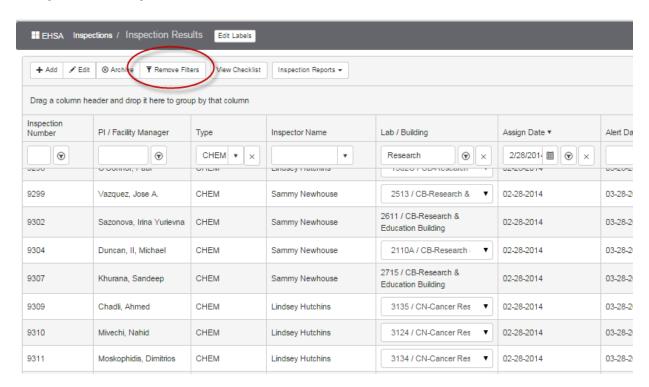
#### For date filters, the user selects a Date:



# The default for a date filter is "equal to" – additional options are shown below:



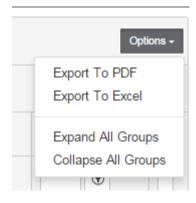
#### Click [Remove Filters] to remove all filters:



#### **Screen Export Options [OnSite Systems help]**

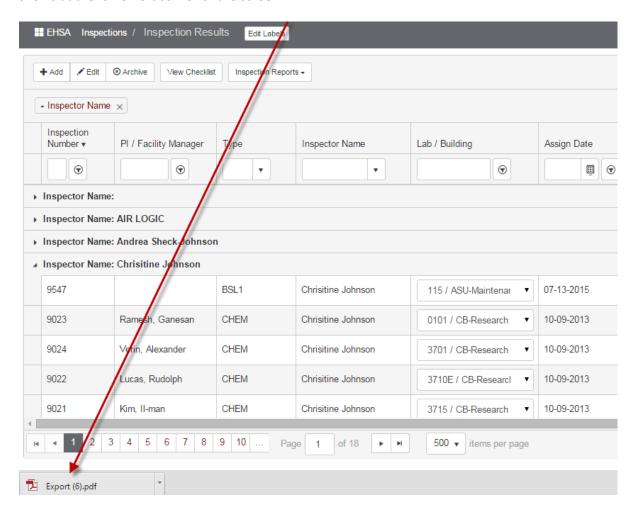
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The Options dropdown in the upper right corner of the screen allows Export to PDF, Export to Excel



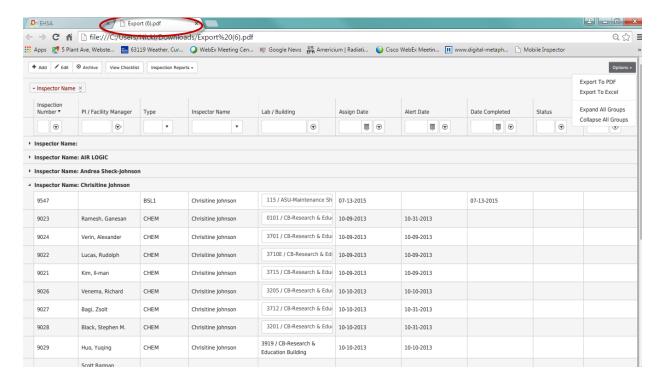
#### Options - Export to PDF or Excel

Export to PDF sends the data as shown on the screen to a PDF file. The data downloads to a PDF file and shows at the lower left corner of the screen.

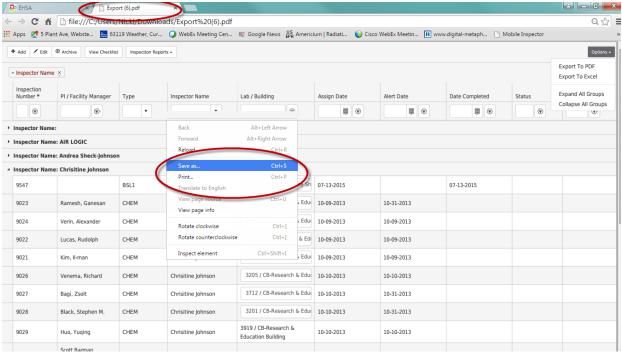




This action functions as a screen shot of the data view shown. Click on the file to open the file in a new window.

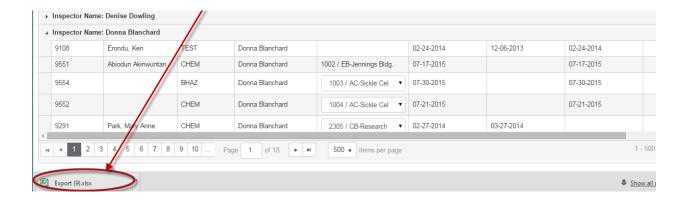


While on the PDF Export screen, right click and select Save as to save the PDF file, or Print to print. Users can also click [Contrl+P] to print.



Export to Excel will download the screen data to an Excel file. Click on the file to open.





This will open the file in Excel – the user can save the file to their computer or network and modify as needed.

#### **Save Settings & Clear Settings [OnSite Systems help]**

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#### Saving settings

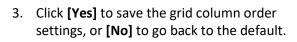
1. To save any new settings for your login (column order in a grid listing, filters and grouping for

one-screen lists), return to any main menu screen where your name is displayed at the top right corner. Select Save Settings from the dropdown options.

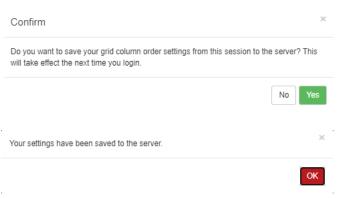


If you do not save the setting changes, the program will revert back to the defaults next time you login into EHSA.

2. A confirmation pop-up box will appear.



 If [Yes] is selected, the program will confirm the new settings have been saved.



5. The next time you log in, the new settings will be displayed.

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#### **Clearing Settings**

1. To Clear Settings and return to defaults, go to any main menu screen where your name is

displayed at the top right corner.

Select **Clear Settings** from the dropdown options.



- 2. A confirmation pop-up box will appear.
- 3. Click [Yes] to clear column order settings, or [No] to leave as selected.
- 4. If **[Yes]** is selected, the program will confirm the settings have been cleared.



Your saved column order settings have been cleared and reset to defaults.

ОК

## **Need Help?**

