

# iLab Account Requests Dashboard – Onboarding Guide

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**Audience:** New support staff and administrators

**Last Updated:** February 2026

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# How the System Works

The iLab Account Requests Dashboard is an internal tool that replaces manual email tracking for iLab signup requests. Here's the big picture:

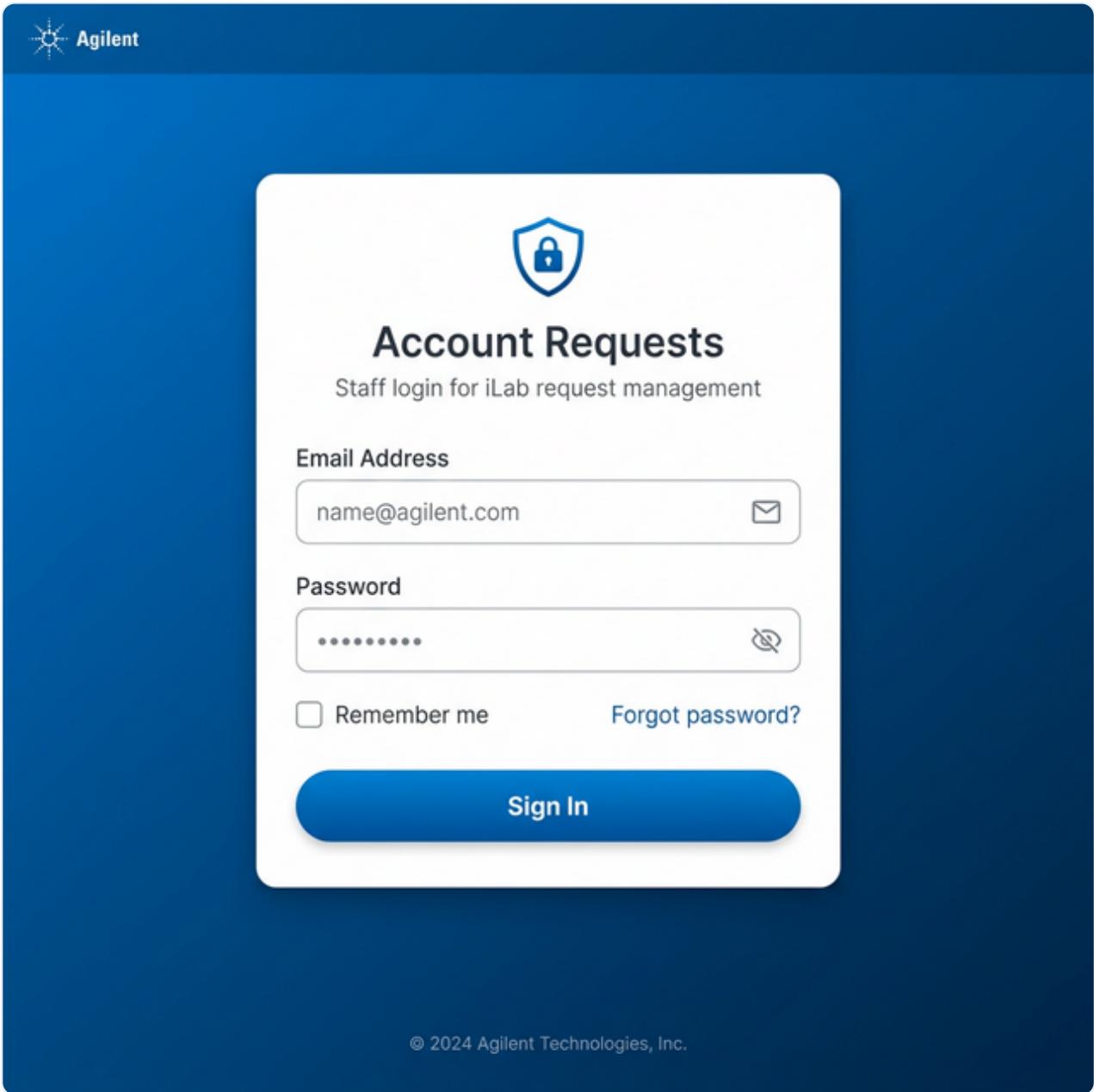
```
graph LR
    A["✉ Email arrives\\n(iLab signup request)"] --> B["⚡ Power Automate\\nwebhook fires"]
    B --> C["💻 Dashboard ingests\\n& creates ticket"]
    C --> D["👤 Agent picks up\\nticket from queue"]
    D --> E["💬 Agent works ticket\\n(notes, emails, status)"]
    E --> F["✅ Agent closes\\nticket when resolved"]
    F --> G["📊 Audit log records\\nevery action"]
```

## Key concepts:

- **Requests** arrive automatically from a shared mailbox via Power Automate
- **Smart Threading** groups email replies with the original request using Outlook Conversation IDs
- **Tabbed Interface** lets you work multiple requests simultaneously — like browser tabs
- **Every action is audited** — status changes, emails sent, notes added, and logins

## Step 1 — Logging In

Navigate to the dashboard URL and you'll see the login screen:



The image shows the Agilent iLab Account Requests login page. At the top left is the Agilent logo. The main title is "Account Requests" with the subtitle "Staff login for iLab request management". Below this are fields for "Email Address" (containing "name@agilent.com") and "Password" (containing masked text). There is a "Remember me" checkbox, a "Forgot password?" link, and a large blue "Sign In" button. At the bottom is a copyright notice: "© 2024 Agilent Technologies, Inc."

FIELD	WHAT TO ENTER
Email Address	Your <a href="#">@agilent.com</a> email
Password	Your assigned password

FIELD	WHAT TO ENTER
Remember me	Check to stay signed in across browser sessions

 **Tip**

**First Login:** If this is your first time logging in, you'll be asked to change your password immediately. Choose something at least 8 characters long.

 **Warning**

**Lockout Protection:** After 5 failed login attempts, your account is temporarily locked for 15 minutes. If you're locked out, wait and try again or contact an admin.

## Step 2 – The Dashboard (Home Base)

After logging in, you land on the **Dashboard** — your command center for all account requests.

The screenshot shows the iLab Support Dashboard. On the left is a sidebar with navigation links: Overview, Import Data, Audit Log, and Users. At the bottom of the sidebar are icons for Admin and Logout. The main area is titled "Dashboard" and displays the following information:

Total Requests	Open	In Progress	Closed
42	8	5	29

Below this is a table listing 10 account requests:

Reference	Subject	Status	Owner	Date
ACCT-001	Yamani Granman	● Open	John Team	Oct 13, 2023
ACCT-002	John Elssan	● Open	Mam Member	Oct 13, 2023
ACCT-003	Mana Gurda	● In Progress	Mam Member	Oct 13, 2023
ACCT-004	Maria Sanan	● In Progress	John Member	Apr 13, 2023
ACCT-005	Kianna Cursan	● Closed	John Team	Oct 13, 2023
ACCT-006	Mudian Vannom	● Closed	Mam Member	Apr 13, 2023
ACCT-007	Maria Sanan	● Closed	Mam Member	Oct 13, 2023
ACCT-008	Kiana Erisan	● Closed	John Team	Apr 13, 2023
ACCT-010	Kianna Cursan	● Closed	John Team	Apr 13, 2023

The interface has three main zones:

### The Sidebar (Left)

Your navigation hub. It stays visible on every page.

NAV ITEM	WHAT IT DOES
<b>Overview</b>	Main dashboard with request queue (you are here)
<b>Import Data</b>	Manually paste email content to create a request
<b>Audit Log</b>	View a read-only record of all agent actions
<b>Users</b>	Manage staff accounts <small>(Admin only)</small>

At the bottom of the sidebar you'll see your **name**, **role** (Admin or User), a **lock icon** to change your password, and a **sign-out** button.

## The Metrics Cards (Top)

Four clickable cards showing real-time counts. See [Step 3](#) for details.

## The Request Queue (Table)

The main table listing all requests. Each row shows:

COLUMN	DESCRIPTION
<b>Reference</b>	Unique ticket ID (e.g., <code>ACCT-001</code> ) in blue monospace
<b>Subject</b>	The email subject line, with the requester's name and organization nested below
<b>Status</b>	<code>Open</code> , <code>In Progress</code> , or <code>Closed</code> — color-coded badge
<b>Owner</b>	Which agent is assigned (or <code>-</code> if unassigned)
<b>Date</b>	When the request was created



### Tip

**Searching:** Use the search bar (🔍) in the table header to filter requests by keyword. Searches across subject, requester name, email, and organization.

## Step 3 — Understanding the Metrics Cards

The four cards at the top of the dashboard are **interactive filters** and **real-time gauges**.

```
graph LR
    subgraph "Metrics Cards"
        A["📁 Total Requests\n>All time count"]
        B["🔴 Open\n>Needs Action"]
        C["⏳ In Progress\n>Processing"]
        D["✅ Closed\n>Completed"]
    end
    style A fill:#eff6ff,stroke:#3b82f6
    style B fill:#eef2ff,stroke:#6366f1
    style C fill:#fffbeb,stroke:#f59e0b
    style D fill:#ecfdf5,stroke:#10b981
```

CARD	COLOR	WHAT IT MEANS	WHAT TO WATCH FOR
<b>Total Requests</b>	Blue	Lifetime count of all requests ever created	General volume indicator
<b>Open</b>	Indigo	Requests awaiting initial triage	⚠️ If this number is high, requests need attention
<b>In Progress</b>	Amber	Actively being worked on	Shows your team's current workload
<b>Closed</b>	Green	Successfully resolved requests	Healthy ratio: most requests should end up here

**How to use them as filters:** Click any card to filter the table below it. For example, clicking **Open** shows only open requests. The active filter card gets a blue left border. Click **Total Requests** to clear the filter and see everything.

## Step 4 — Opening a Request (Tabbed Detail View)

Click any row in the request table to open it in a **new tab** — just like browser tabs, but within the dashboard itself.

The screenshot shows the iLab Account Requests Dashboard. A specific ticket, "ACCT-007", is selected and displayed in a detailed view. The left side of the screen features an "Activity Stream" with 5 messages. The stream shows a conversation between an "Agent" (Support) and a "Customer". The Agent's message reads: "Hey there, yes a new i new account nequest request inforrmarized an iLab Account request. Thanks for yourring! Agent". The Customer's message reads: "Hi, Here's neceestary for our customer request now, help not to panshazfor a messages and hoho: for meacomer:ith proounts of your requests. Thanks". Below the stream is a text input field with a placeholder "Type a new internal note..." and a "Send" button. The right side of the screen displays the "Ticket ACCT-007" details. It includes sections for "Details" (Type: Open, Created date: May 13, 2021, iLab: <https://ii>), "Status & Owner" (both dropdowns set to "Open"), "Requester" (Namm Smith, marieah@gmail.com, Organization), and "Quick Actions" (Reply via Email, Close Ticket).

The detail view is split into two columns:

## Left Column — Activity Stream

This is the conversation history, shown newest-first (reverse chronological). Each message is a **card** showing:

- **Avatar** with initials (blue gradient = Support Agent ✓, gray = Requester, light gray = System)
- **Role badge** — `Support`, `Requester`, or `System`
- **Timestamp** — auto-converted to your local timezone
- **Message body** — the full email or note content

**Activity Filters:** Click the funnel icon (\*) to toggle filter buttons:

- `All` — Show everything
- `System` — System-generated activity (status changes, assignment updates)
- `Agent` — Agent replies and internal notes
- `Customer` — Requester messages only

**Audit Log Toggle:** Click the clock icon (⌚) to switch between the rich message card view and a compact, monospace audit-log-style table.

## Right Column — Metadata Sidebar

A floating glass-effect card containing:

SECTION	WHAT IT SHOWS
<b>Header</b>	Ticket ID ( <code>ACCT-007</code> ) and subject line on a dark background
<b>Details</b>	Request type, creation date, and link to the iLab system
<b>Status &amp; Owner</b>	Dropdown selectors for status and assignee (see Step 5)
<b>Requester</b>	Name, email (clickable mailto), organization, and lab name
<b>Quick Actions</b>	<code>Reply via Email</code> button and <code>Close/Reopen Ticket</code> button

## Bottom — Inline Note Composer

A sticky textarea at the bottom of the Activity Stream. Type your internal note and click the blue ✈ send button. These notes are **internal only** — they are NOT emailed to the requester.



## Step 5 – Working a Ticket

Once you've opened a request, here's the typical workflow:

```
flowchart TD
    A["New request arrives\\n>Status: Open")] --> B{"Assign to yourself?"}
    B -- Yes --> C["Set Assignee to\\nyour name"]
    C --> D["Change status to\\n'In Progress'"]
    D --> E{"Need more info\\nfrom requester?"}
    E -- Yes --> F["Reply via Email"]
    E -- No --> G["Process the request\\n\\nin iLab system"]
    F --> H["Wait for reply\\n(auto-threaded)"]
    H --> G
    G --> I["Add internal note\\ndocumenting resolution"]
    I --> J["Close Ticket"]
```

### Changing Status

Click the **Status** dropdown in the sidebar. Options:

STATUS	DOT COLOR	WHEN TO USE
Open	● Blue	Request hasn't been triaged yet
In Progress	● Amber	You're actively working on it
Closed	● Green	Request is fully resolved

### Assigning a Ticket

Click the **Assignee** dropdown in the sidebar to assign the ticket to yourself or another agent. This shows all active staff members.

### Adding Internal Notes

Use the inline composer at the bottom of the Activity Stream:

1. Type your note in the text area
2. Click the blue send button (✉)
3. The note appears immediately in the activity stream

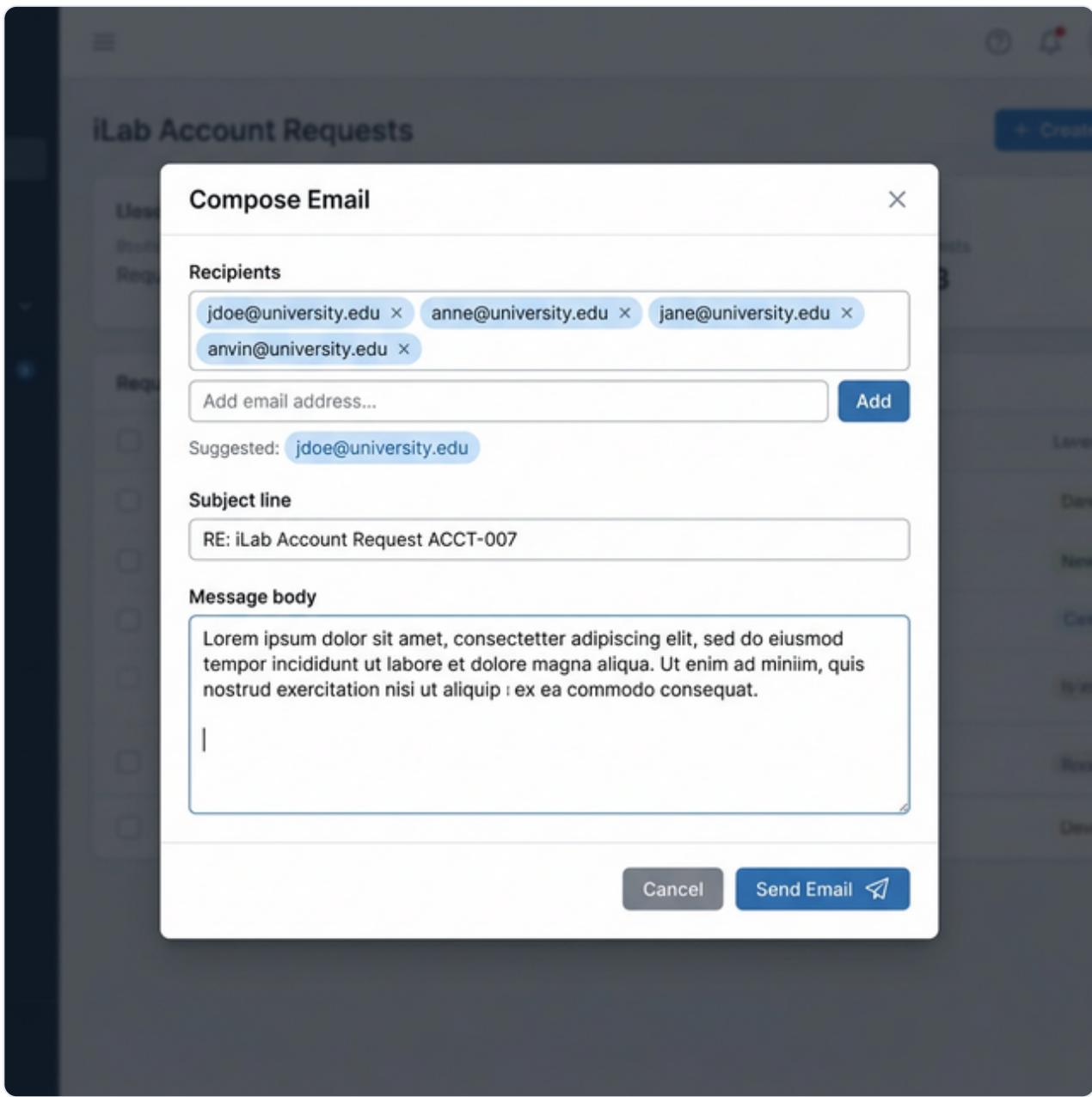
**! Important**

Internal notes are **not visible to requesters**. They're for your team's internal communication only.

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## Step 6 — Communicating with the Requester

To send an email to the requester, click the **Reply via Email** button in the sidebar. This opens the email compose modal:



FIELD	HOW TO USE
<b>Recipients</b>	The requester's email is suggested — click it to add. Type additional emails and press Enter or click "Add"

FIELD	HOW TO USE
<b>Subject</b>	Pre-filled with the request reference. Edit as needed
<b>Message</b>	Write your response. Will be sent via the system's SMTP relay

Click **Send Email** to dispatch. The email appears in the Activity Stream and is recorded in the Audit Log.

 **Tip**

**Reply threading:** When the requester replies to your email, their response is automatically threaded back into the same ticket via the Outlook Conversation ID. No manual re-linking needed.

## Step 7 — Closing a Ticket

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When a request is fully resolved:

1. **Add a final note** explaining what was done (for audit trail purposes)
2. Click **Close Ticket** in the sidebar Quick Actions

The status badge changes to  **Closed** and the button switches to **Reopen Ticket** in case it needs to be revisited.

 **Note**

Closing a ticket does not delete it. The full history is preserved and accessible anytime. You can always reopen it if the issue resurfaces.

## Step 8 – Checking the Audit Log

Navigate to **Audit Log** in the sidebar to view a comprehensive, immutable record of all actions.

The screenshot shows a table titled "Support Agent Audit Trail" with the subtitle "Immutable record of all agent actions. Read-only." A badge in the top right corner indicates "156 entries shown". The table has columns for "Timestamp UTC", "Agent", "Action", "Request", "Details", "IP Address", and "Result". The "Agent" and "Action" columns have dropdown filters. The "Details" column contains links to specific actions like "Login", "Status changed", "Assignment", "Email", and "Note". The "Result" column shows green checkmarks for most entries, except for one red "X".

Timestamp UTC	Agent	Action	Request	Details	IP Address	Result
2022-03-23 17:24:58	roammink@gmail.com	Login	ACCT-###	Login	132.16.8.0.23	✓
2022-03-23 17:24:56	roammink@gmail.com	Login changed	ACCT-###	login: Context	132.16.8.0.255	✓
2022-03-23 17:36:37	roammink@gmail.com	Status changed	ACCT-###	status status → new agent	132.16.8.0.23	✓
2022-03-23 17:26:33	roammink@gmail.com	Status changed	ACCT-###	status status → new agent	132.16.8.0.23	✓
2022-03-23 17:33:33	roammink@gmail.com	Status changed	ACCT-###	status status → new agent	132.16.8.0.25	✓
2022-03-23 17:03:29	ilabsev@example.com	Assignment	ACCT-###	account rent → assignment	132.16.8.0.24	✗
2022-03-23 17:02:29	ilabsev@example.com	Assignment	ACCT-###	assignments → assigned	132.16.8.0.23	✓
2022-03-23 17:03:19	ilabsev@example.com	Email	ACCT-###	update recent	132.16.8.0.23	✓
2022-03-23 17:03:19	ilabsev@example.com	Email	ACCT-###	email ides to ilab account requests	132.16.8.0.24	✓
2022-03-23 17:02:29	ilabsev@example.com	Email	ACCT-###	update team account request	132.16.8.0.26	✓
2022-03-23 17:02:26	ilabsev@example.com	Email	ACCT-###	update result	132.16.8.0.23	✓
2022-03-23 17:02:26	ilabsev@example.com	Email	ACCT-###	accountsium context	132.16.8.0.24	✓
2022-03-23 17:32:29	ilabsev@example.com	Email	ACCT-###	update record account request	132.16.150.16	✗
2022-03-23 17:33:23	ilabsev@example.com	Email	ACCT-###	status nation	152.16.8.0.25	✗
2022-03-23 17:32:29	ilabsev@example.com	Note	ACCT-###	account recnd account request	132.16.8.0.26	✓
2022-03-23 17:33:28	ilabsev@example.com	Note	ACCT-###	update result	152.16.8.0.25	✓
2022-03-23 17:43:14	ilabsev@example.com	Note	ACCT-###	assignment → noters	152.16.8.0.23	✓
2022-03-22 14:52:28	ilabsev@example.com	Note	ACCT-###	update record account request	152.16.8.0.23	✓

## Filtering the Audit Log

Use the filter bar at the top:

FILTER	OPTIONS
<b>Agent</b>	Filter by a specific staff member, or "All Agents"
<b>Action Category</b>	Filter by type of action (see table below)

## Understanding Action Categories

Every action is logged with a color-coded badge:

BADGE	ACTION CODE	WHAT IT MEANS
Purple	<code>agent.login</code>	Agent signed in
Slate	<code>agent.logout</code>	Agent signed out
Amber	<code>request.status</code>	Ticket status was changed (Open → In Progress, etc.)
Violet	<code>request.assignment</code>	Ticket was assigned or re-assigned
Blue	<code>request.email</code>	Email was sent to requester
Teal	<code>request.comment</code>	Internal note was added
Orange	<code>request.import</code>	Request was manually imported

## Reading an Audit Entry

Each row shows:

COLUMN	WHAT IT CONTAINS
<b>Timestamp (UTC)</b>	Exact time the action occurred
<b>Agent</b>	Email of the agent who performed the action
<b>Action</b>	Color-coded badge (see above)
<b>Request</b>	Clickable <code>ACCT-###</code> link — opens the ticket in a tab
<b>Details</b>	Key-value metadata chips (e.g., <code>status: Open → Closed</code> )
<b>IP Address</b>	Agent's IP at time of action

COLUMN	WHAT IT CONTAINS
<b>Result</b>	 Success or  Failed

**! Important**

The Audit Log is **read-only**. No entries can be modified or deleted. This provides a reliable forensic trail for compliance and accountability.

# Navigation Reference

```
graph TD
    subgraph "⌚ Application Navigation"
        Login["🔒 Login Page"] --> Dashboard
        Dashboard["📊 Dashboard\n(Overview)"] --> Detail["📋 Request Detail\n(Tabbed View)"]
        Dashboard --> Import["📥 Import Data"]
        Dashboard --> Audit["🛡 Audit Log"]
        Dashboard --> Users["👤 User Management\n(Admin only)"]
        Detail --> Email["✉ Compose Email\n(Modal)"]
        Detail --> Note["📝 Internal Note\n(Inline Composer)"]
        Detail --> Status["🕒 Status Change\n(Dropdown)"]
        Detail --> Assign["👤 Assign Agent\n(Dropdown)"]
    end
```

## Keyboard Shortcuts

SHORTCUT	ACTION
<code>Cmd/Ctrl + W</code>	Close the active request tab (returns to Dashboard)
<code>Enter</code> (in search)	Submit search query
<code>Enter</code> (in recipient field)	Add email recipient

# Glossary

TERM	DEFINITION
<b>Request</b>	An iLab account signup request submitted via email
<b>Ticket</b>	Used interchangeably with "Request" — refers to the trackable record
<b>Reference / Request Key</b>	Unique identifier like <b>ACCT-001</b> , assigned automatically
<b>Activity Stream</b>	The threaded conversation view showing all messages, notes, and system events
<b>Internal Note</b>	A private comment visible only to support agents — never sent to the requester
<b>Smart Threading</b>	Automatic linking of email replies to the original request via Outlook Conversation ID
<b>Power Automate</b>	Microsoft workflow automation tool that pushes new emails into the dashboard
<b>Audit Trail</b>	The immutable log of every action performed in the system
<b>Triage</b>	The process of reviewing a new request and deciding next steps
<b>SLA</b>	Service Level Agreement — the target time to resolve a request