iLab Account Requests Dashboard — Onboarding Guide

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:

```
flowchart 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

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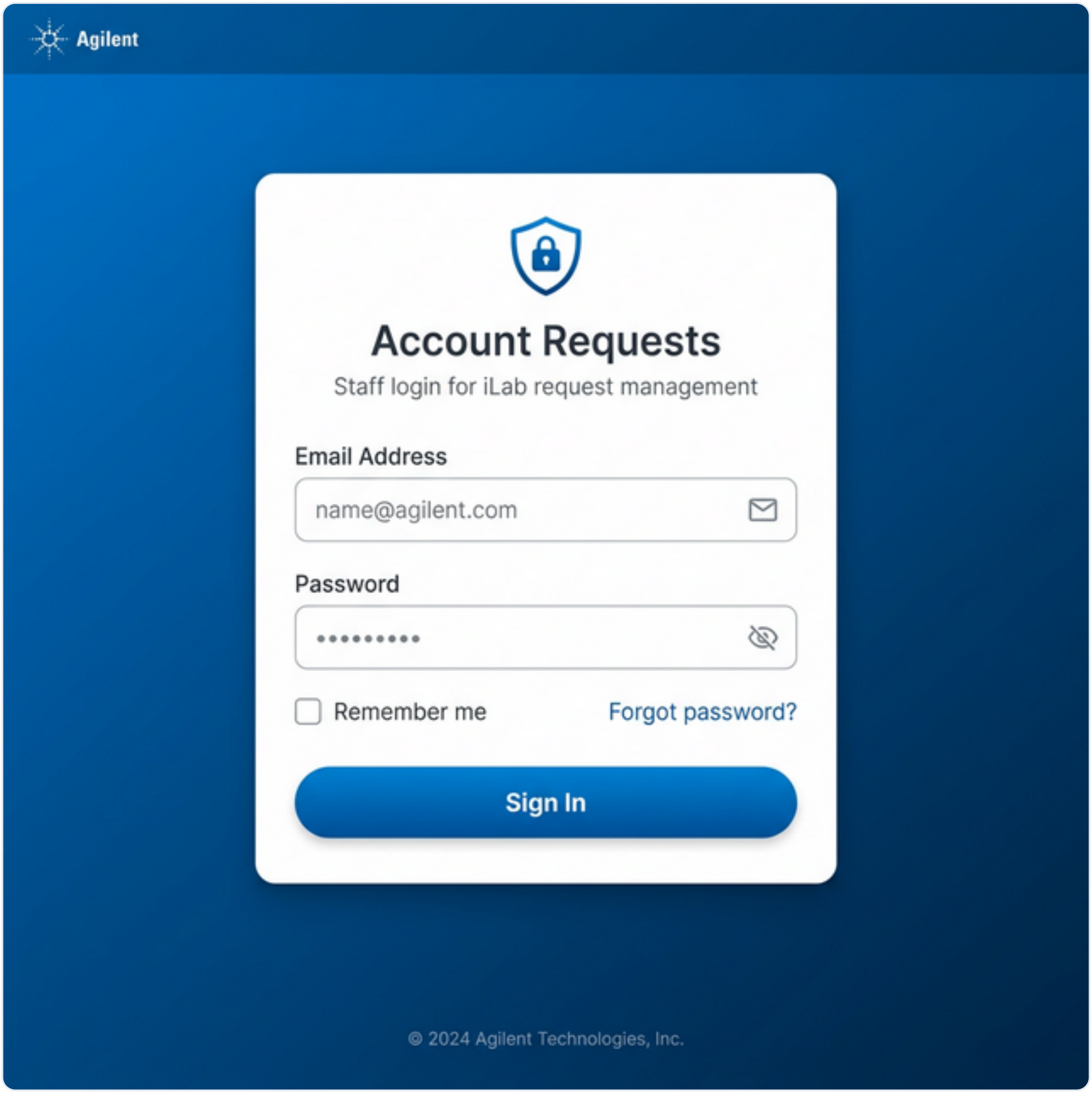
Step 1 — Logging In

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



FIELD	WHAT TO ENTER
Email Address	Your `@agilent.com` email
Password	Your assigned password

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

💡 **Tip**

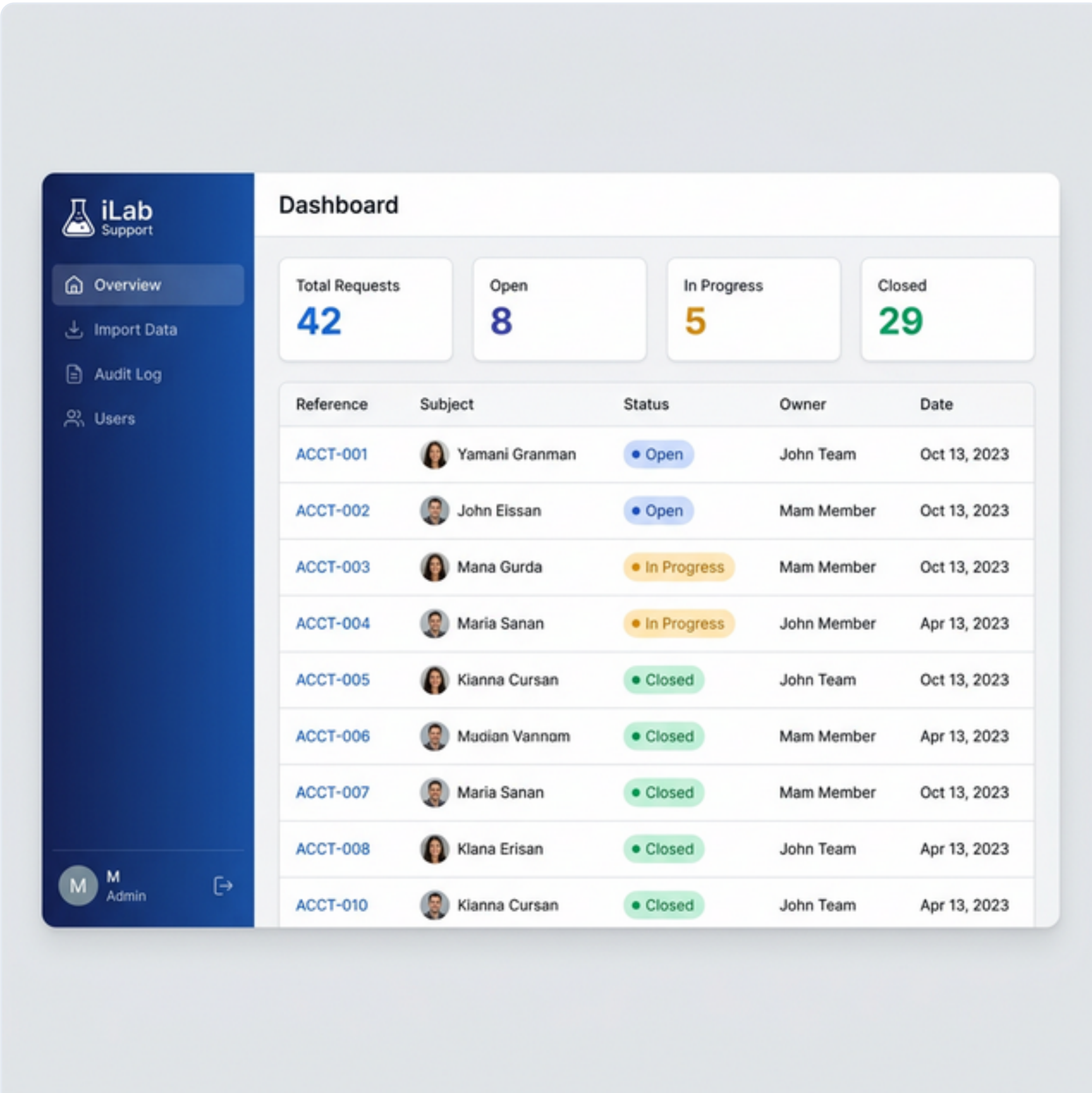
First Login: If this is your first time logging in, you'll be asked to change your password immediately. Choose something at least 8 characters long.

⚠️ **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 interface has three main zones:

The Sidebar (Left)

Your navigation hub. It stays visible on every page.

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

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
Reference	Unique ticket ID (e.g., `ACCT-001`) in blue monospace
Subject	The email subject line, with the requester's name and organization nested below
Status	`Open`, `In Progress`, or `Closed` — color-coded badge
Owner	Which agent is assigned (or `—` if unassigned)
Date	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**.

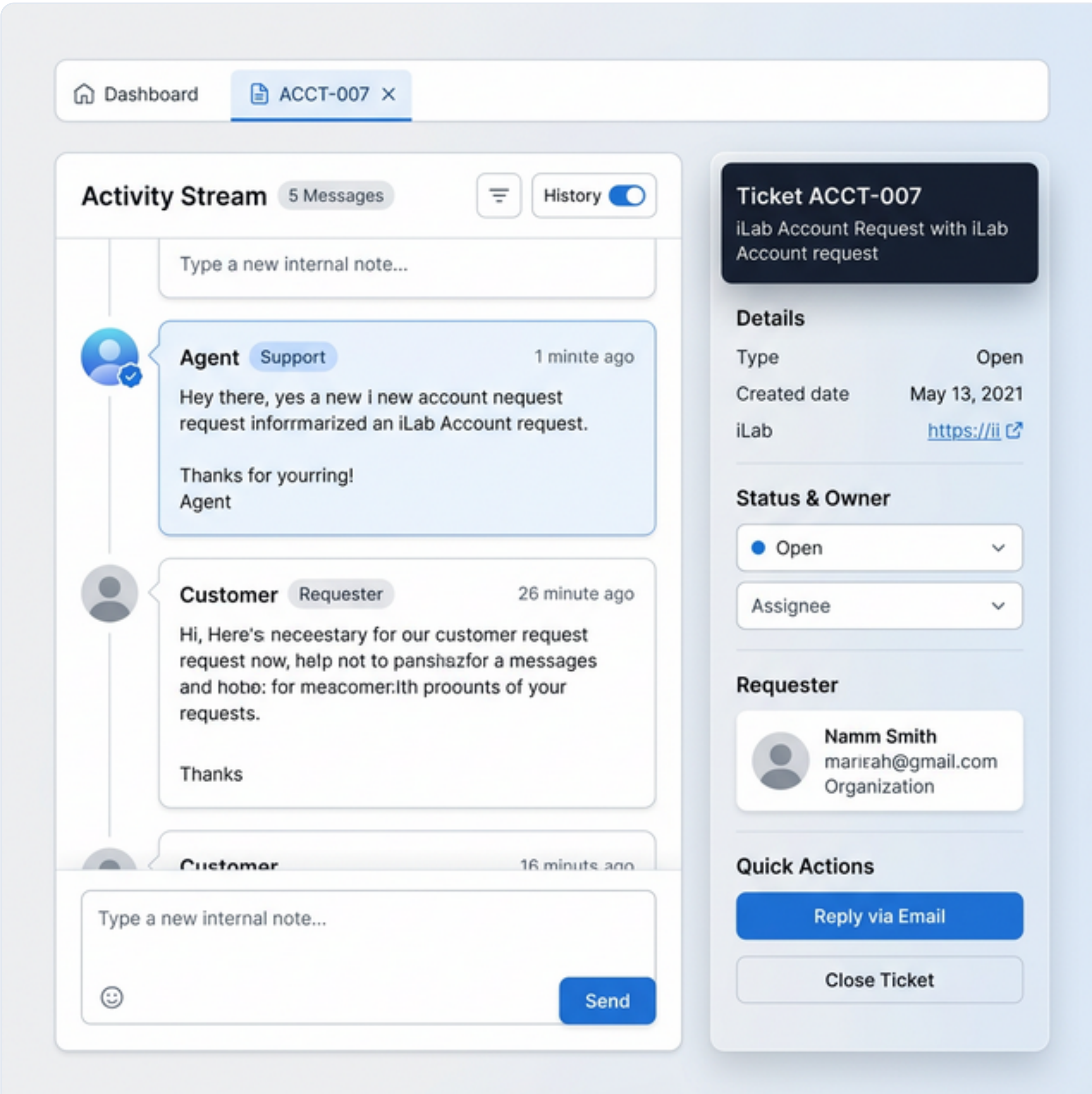
```
graph LR
    subgraph "📊 Metrics Cards"
        A["📁 Total Requests\n(All time count)"]
        B["📬 Open\n(Needs Action)"]
        C["⏳ In Progress\n(Processing)"]
        D["✅ Closed\n(Completed)"]
    end
    style A fill:#eff6ff,stroke:#3b82f6
    style B fill:#eef2ff,stroke:#6366f1
    style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

CARD	COLOR	WHAT IT MEANS	WHAT TO WATCH FOR
Total Requests	Blue	Lifetime count of all requests ever created	General volume indicator
Open	Indigo	Requests awaiting initial triage	⚠️ If this number is high, requests need attention
In Progress	Amber	Actively being worked on	Shows your team's current workload
Closed	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 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
Header	Ticket ID (`ACCT-007`) and subject line on a dark background
Details	Request type, creation date, and link to the iLab system
Status & Owner	Dropdown selectors for status and assignee (see Step 5)
Requester	Name, email (clickable mailto), organization, and lab name
Quick Actions	`Reply via Email` button and `Close/Reopen Ticket` 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\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:

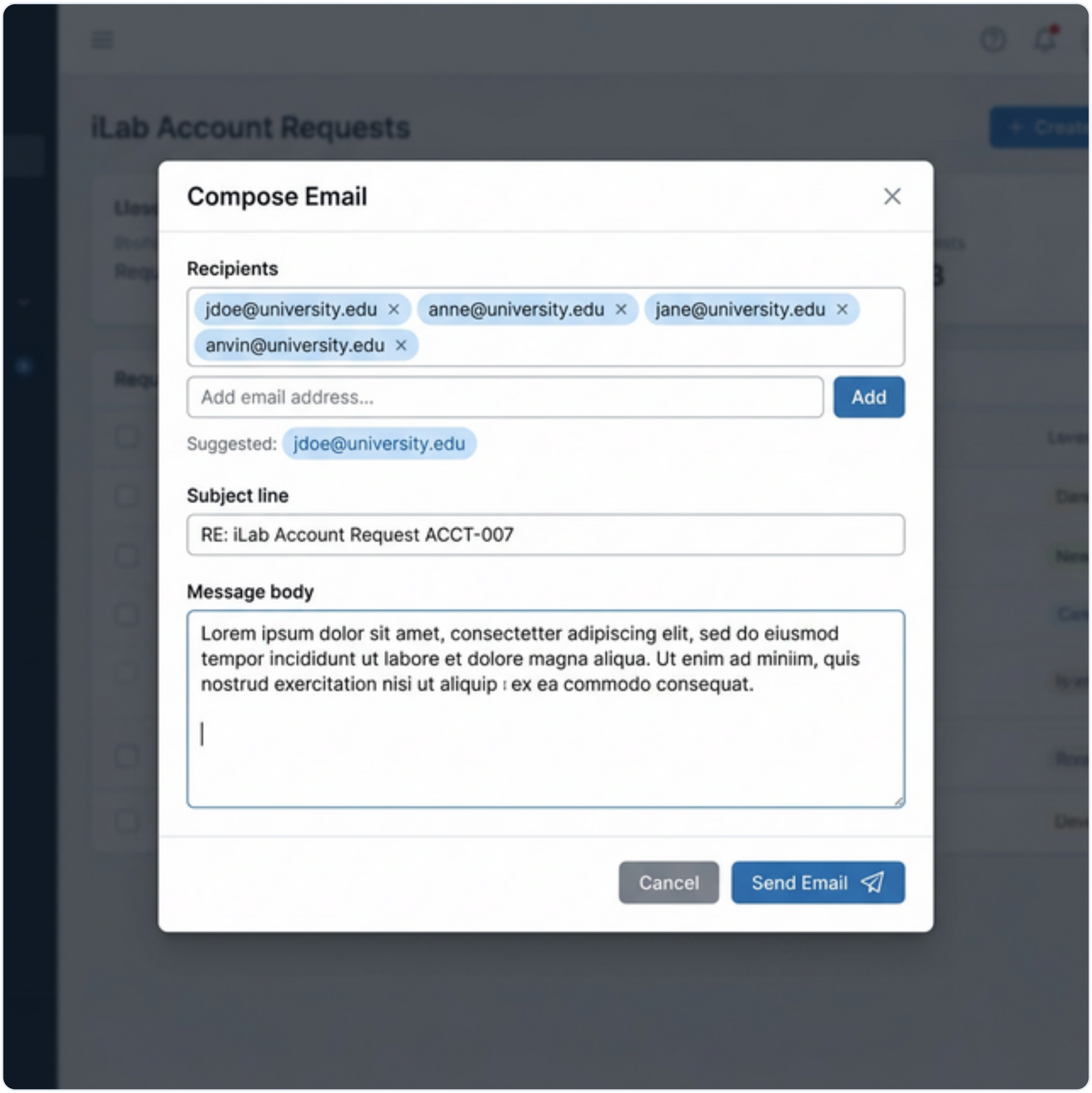
1. Type your note in the text area
2. Click the blue send button (✈️)
3. The note appears immediately in the activity stream

❗ **Important**

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

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
Recipients	The requester's email is suggested — click it to add. Type additional emails and press Enter or click "Add"

FIELD	HOW TO USE
Subject	Pre-filled with the request reference. Edit as needed
Message	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

When a request is fully resolved:

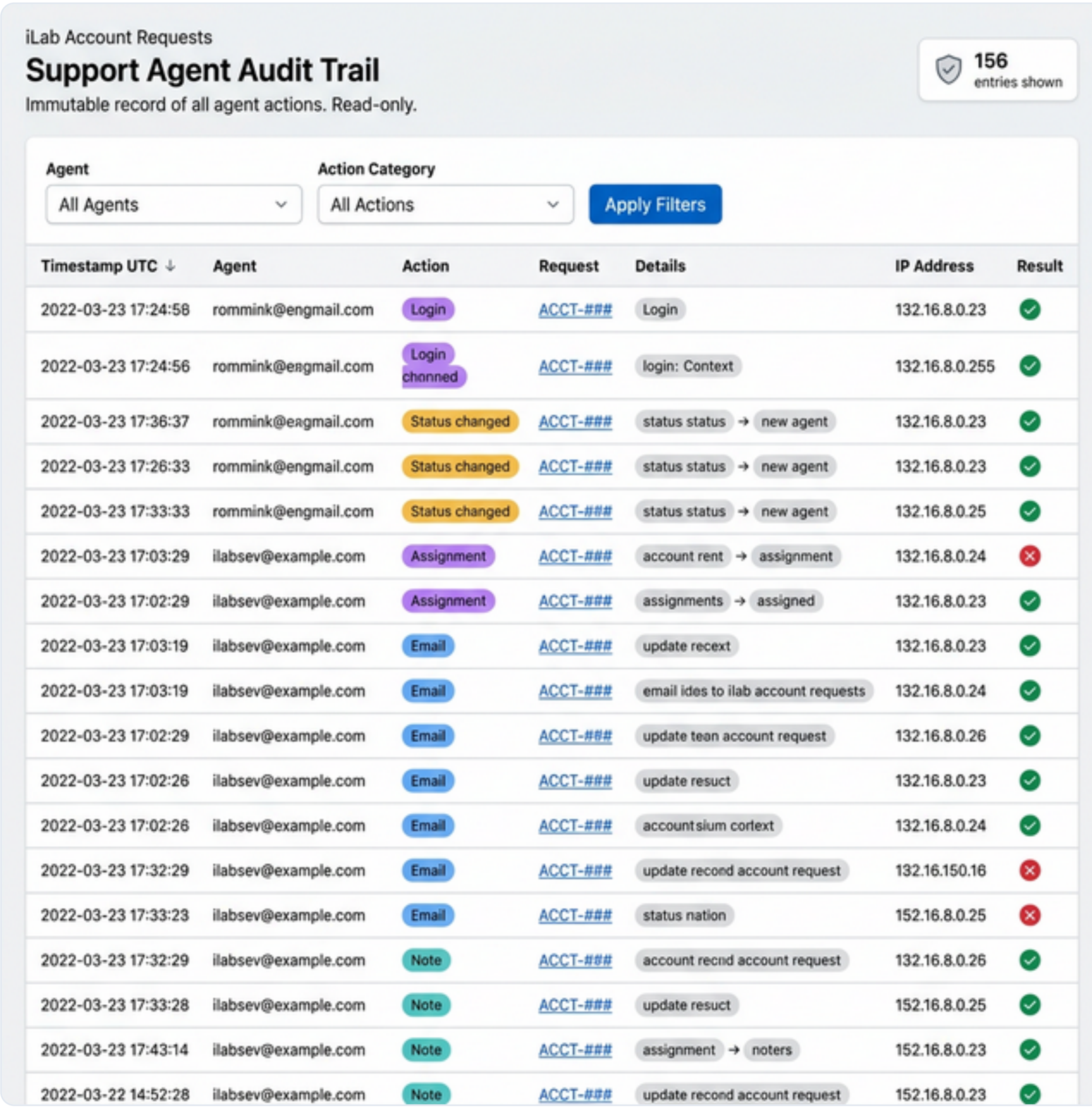
1. **Add a final note** explaining what was done (for audit trail purposes)
2. Click **Close Ticket** in the sidebar Quick Actions

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

> ℹ️ **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.



Filtering the Audit Log

Use the filter bar at the top:

FILTER	OPTIONS
Agent	Filter by a specific staff member, or "All Agents"
Action Category	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	`agent.login`	Agent signed in
⬜ Slate	`agent.logout`	Agent signed out
🟡 Amber	`request.status`	Ticket status was changed (Open → In Progress, etc.)
🟣 Violet	`request.assignment`	Ticket was assigned or re-assigned
🔵 Blue	`request.email`	Email was sent to requester
🟢 Teal	`request.comment`	Internal note was added
🟠 Orange	`request.import`	Request was manually imported

Reading an Audit Entry

Each row shows:

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

COLUMN	WHAT IT CONTAINS
Result	✅ 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
`Cmd/Ctrl + W`	Close the active request tab (returns to Dashboard)
`Enter` (in search)	Submit search query
`Enter` (in recipient field)	Add email recipient

Glossary

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