UNDERSTANDING CLIENT ADMINISTRATION

What Is a "Client"?

In Infinity X, a Client is a billing profile established to accept financial responsibility for fee-for-service activities completed through Infinity X.

Activities billed through a Client profile may include:

- Instrument and space reservations
- Facility services
- Technical support
- Training activities
- Analytical services
- Other fee-for-service work offered through participating facilities

Users must be affiliated with an approved Client before they can submit most requests or reserve resources in Infinity X.

What Is a Client Administrator?

The Client Administrator is responsible for managing the Client profile and approving activities carried out under that Client's financial authority.

Responsibilities may include:

- Approving user affiliations
- Managing access to funding sources
- Reviewing service request quotations
- Approving invoices
- Maintaining financial oversight of facility activity

For a faculty research group, the Principal Investigator is typically the Client Administrator. Other organizations may designate an alternate financial authority.

Getting Your Research Group Set Up

Submit the Dalhousie Infinity X Client Registration Form to request a Client profile. The Institutional Administrator will use the information provided to create the profile.

How to Use This Guide

This guide is intended for Client Administrators, including faculty members or other individuals responsible for the financial activity of a registered Client in Infinity X. Use this guide as a quick reference for the administrative tasks that require your attention.

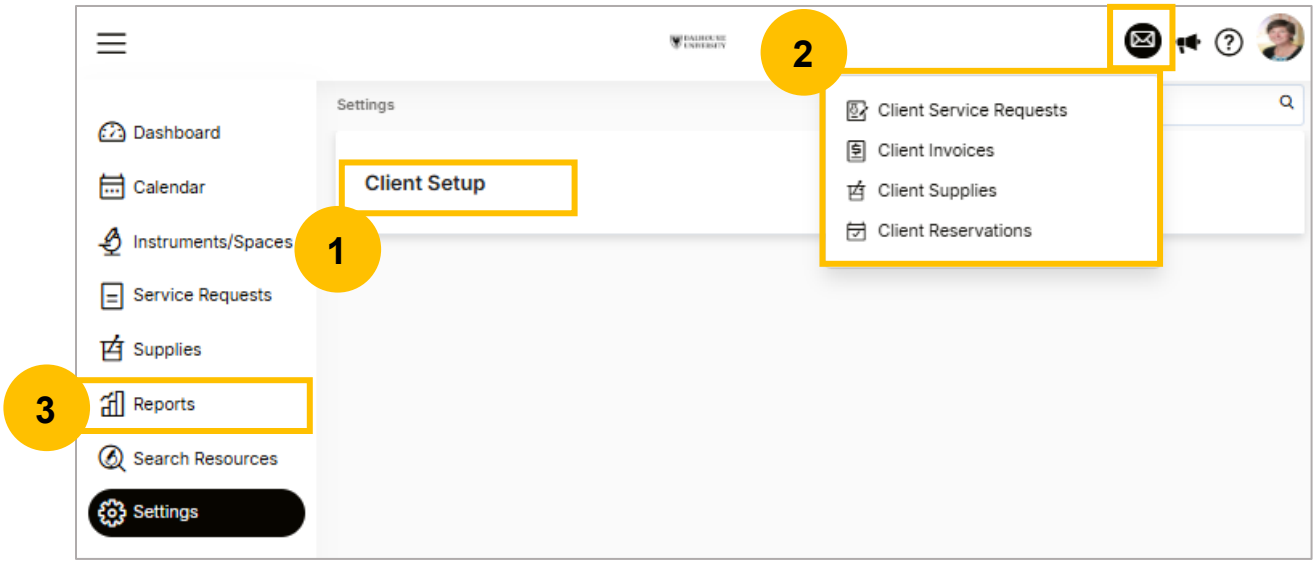
If you also use Infinity X to request services or reserve instruments and spaces, refer to the Infinity X User Quick Start Guide for instructions on completing those user activities. The Quick Start Guide covers login, Client affiliation, facility and instrument access, reservations, service requests, and tracking requests.

Use this guide when you need to:

- Understand the Client Administrator menus
- Review or approve a user's association with my Client profile
- Review transactions and approve an invoice
- Review and respond to a service request quote

CLIENT ADMINISTRATOR MENUS

The Client Administrator role has access to three additional menu features in Infinity.



1. Client Setup Menu – view client information and affiliated users, approve/reject users

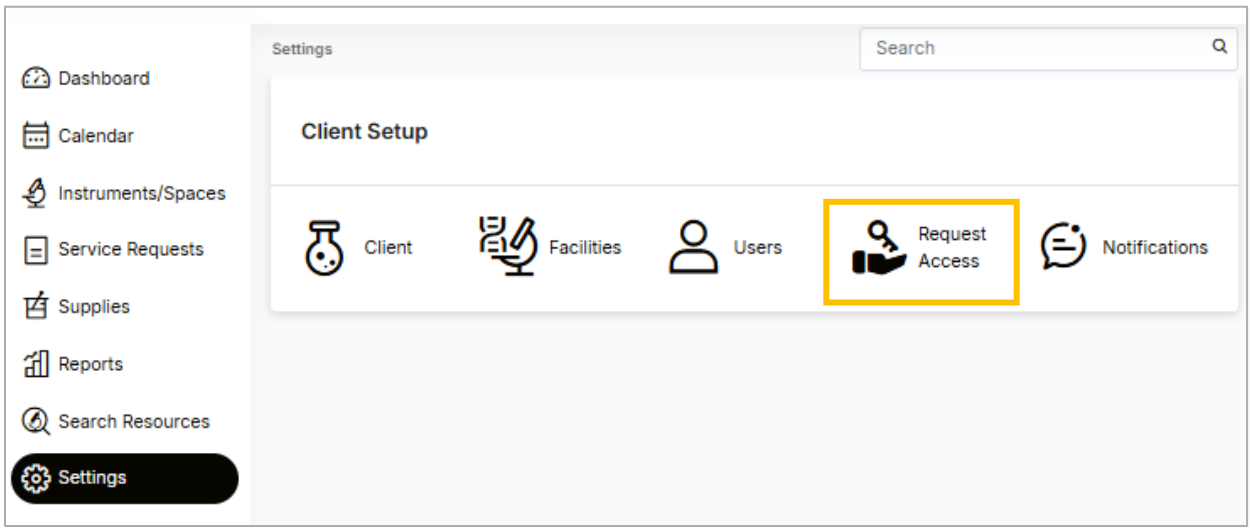
2. Client Administrator Inbox – view/manage user requests, reservations, and invoices

3. Reports – view reports on facility activity by your users

HOW TO APPROVE USERS

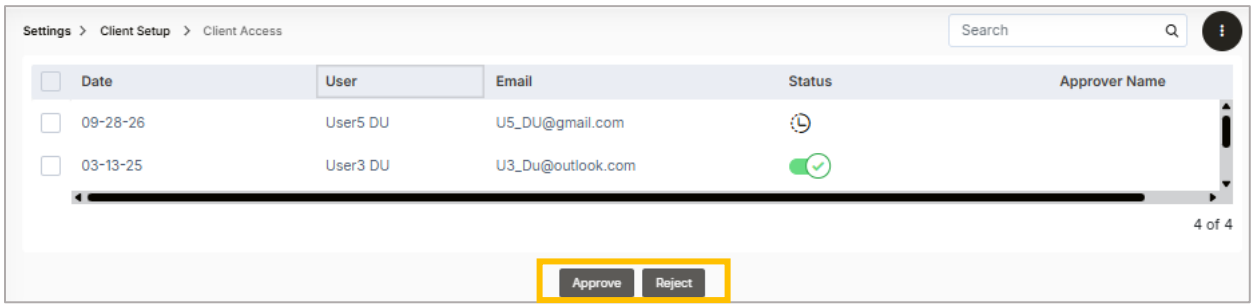
Step 1: Go to User Requests

Select **Settings** → **Client Setup**, then select the **Request Access** icon.



Step 2: Approve User(s)

The Client Access window will display a list of users currently approved or pending approval to use your Client profile.



Select one or more users and click **<Approve>**. To remove a previously approved user or reject a request from someone outside your group, select the user and click **<Reject>**.

HOW TO APPROVE SERVICE REQUEST QUOTES

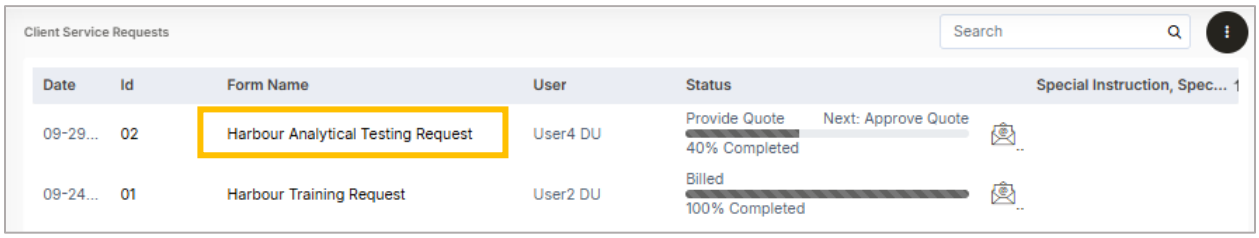
Step 1: Go to Client Service Requests

Click on the mailbox icon to open the menu and select Client Service Requests

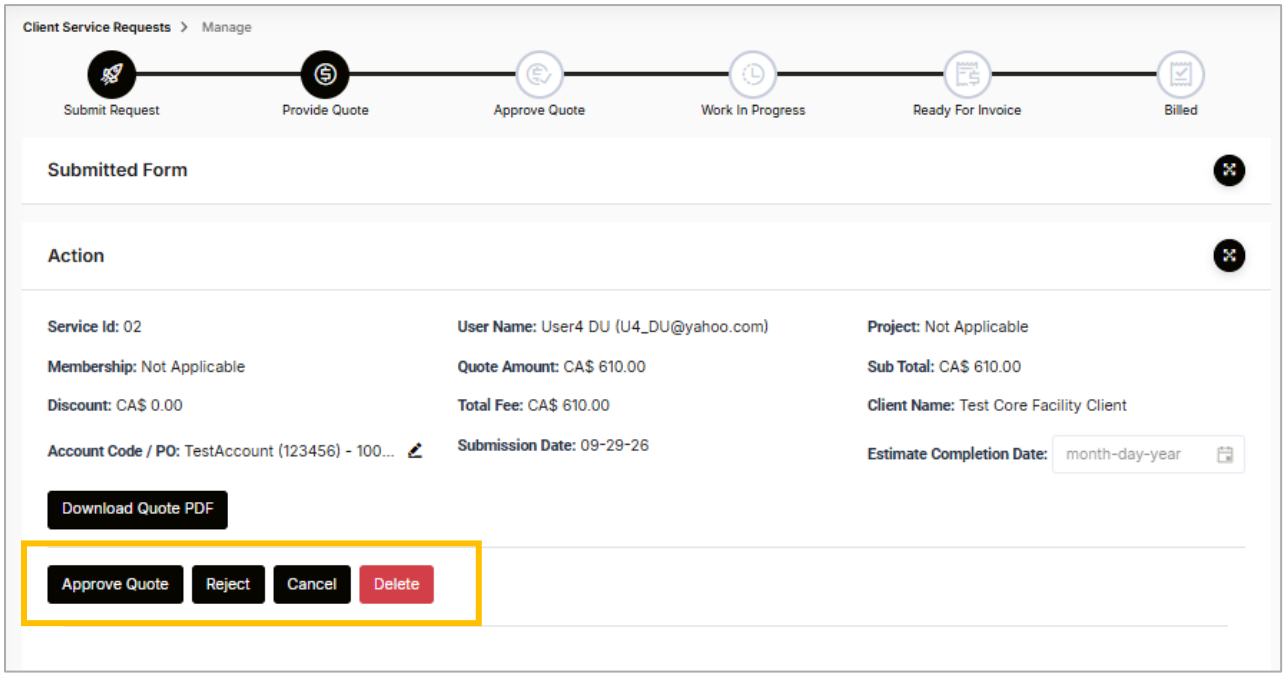


Step 2: Open Request Management Window

Click on the form name to open the request management window.



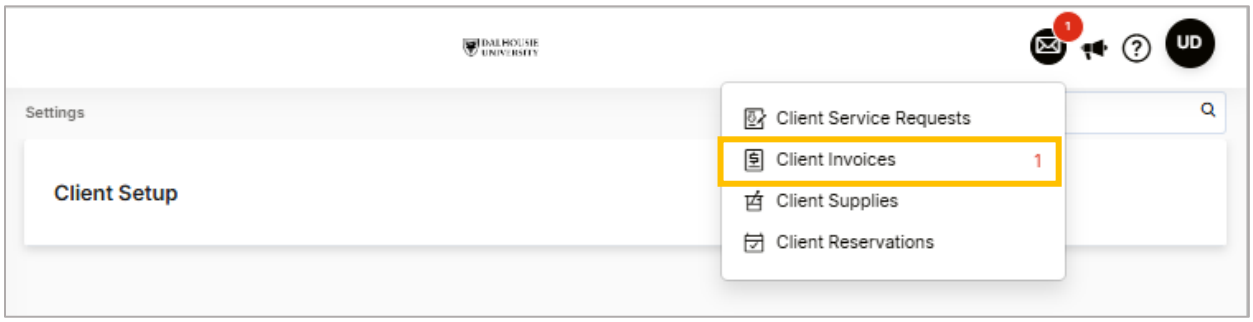
Expand the **Action** section to review the quote summary and download the quote PDF. Then select **<Approve>**, **<Reject>**, **<Cancel>**, or **<Delete>**, as appropriate.



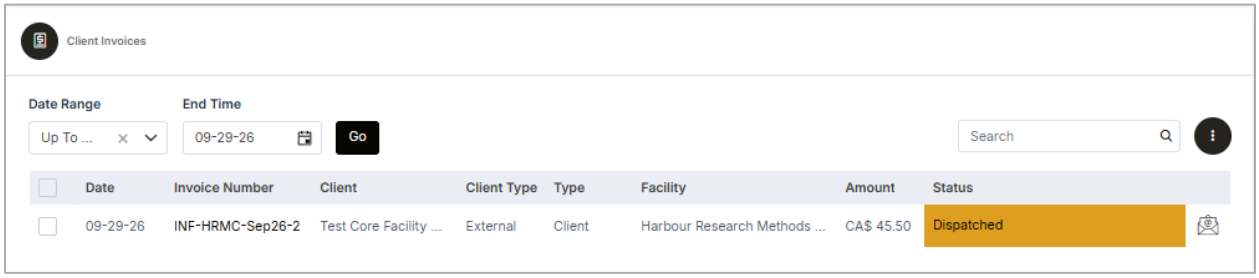
HOW TO APPROVE INVOICES

Step 1: Go to Client Invoices

A notification will appear next to the mailbox icon when there is an invoice requiring your attention. Click on the mailbox icon to open the menu and select **Client Invoices**

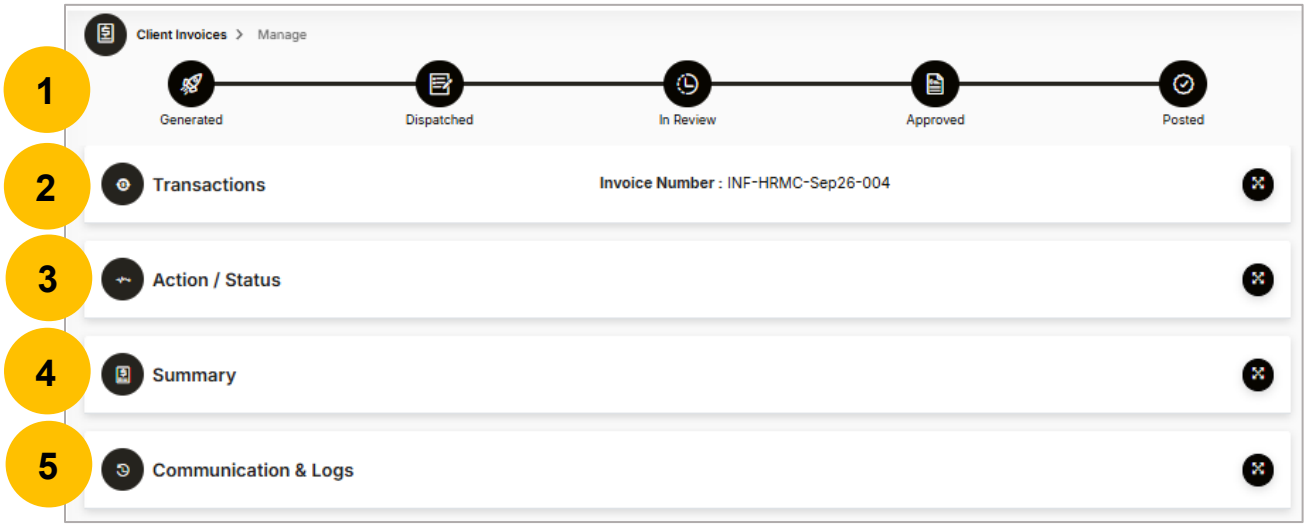


The **Client Invoices** window lists each invoice and its status. A newly issued invoice has a **"Dispatched"** status, which means it is awaiting review and approval by the Client Administrator.



Step 2: Open Invoice Management Window

Click on the invoice number to open the invoice management window. This window is visible to all admins included in the workflow.

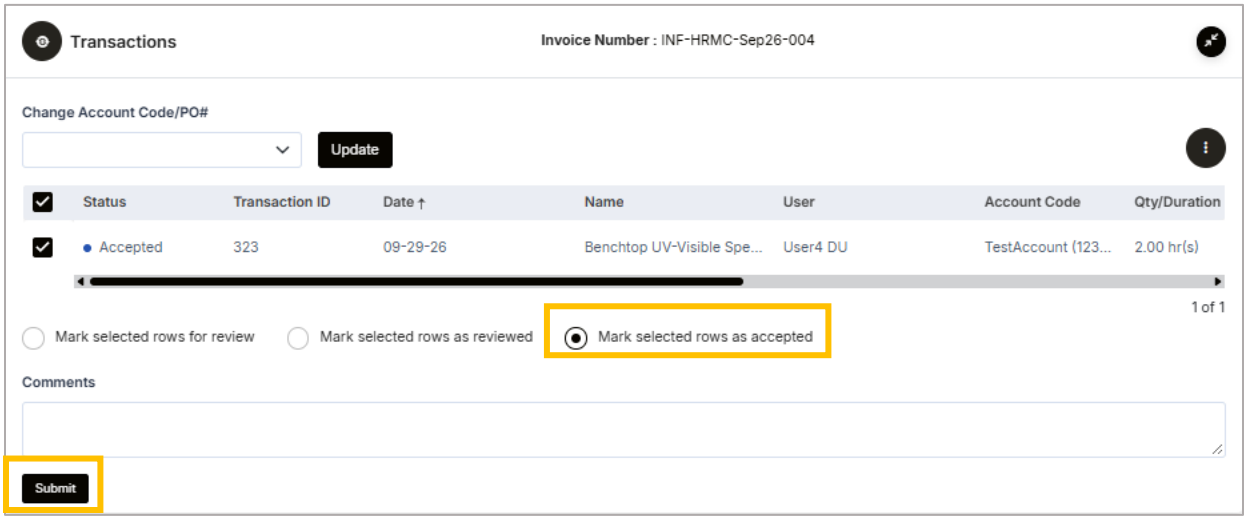


The invoice management window includes:

1. **Workflow progress bar** - as the invoice progresses through the workflow stages, the workflow progress bar at the top of the window will be updated.
2. **Transactions section** (expandable) – review the transactions included in the invoice. Internal users can change the account code to be billed for each transaction, if needed. The invoice can also be exported to Excel or PDF from here, if needed.
3. **Action/Status section** (expandable) – the request is advanced through each workflow stage when the applicable user clicks the appropriate action.
4. **Summary section** (expandable) – summary information for the invoice export
5. **Communications & Logs section** (expandable) – E-mails and attachments relating to the invoice can be sent directly from this section. A log maintains a record of communication and activity.

Step 3: Review Transactions

Expand the **Transactions** section and review the transactions on the invoice. Select the applicable rows, mark them as accepted, and click **<Submit>**.



Step 4: Approve Transactions

Expand the **Action/Status** section and click **<Approve>**. You may complete this step at the same time as Step 3. The separate acceptance and approval stages support situations in which different group members review transactions and provide financial approval.

