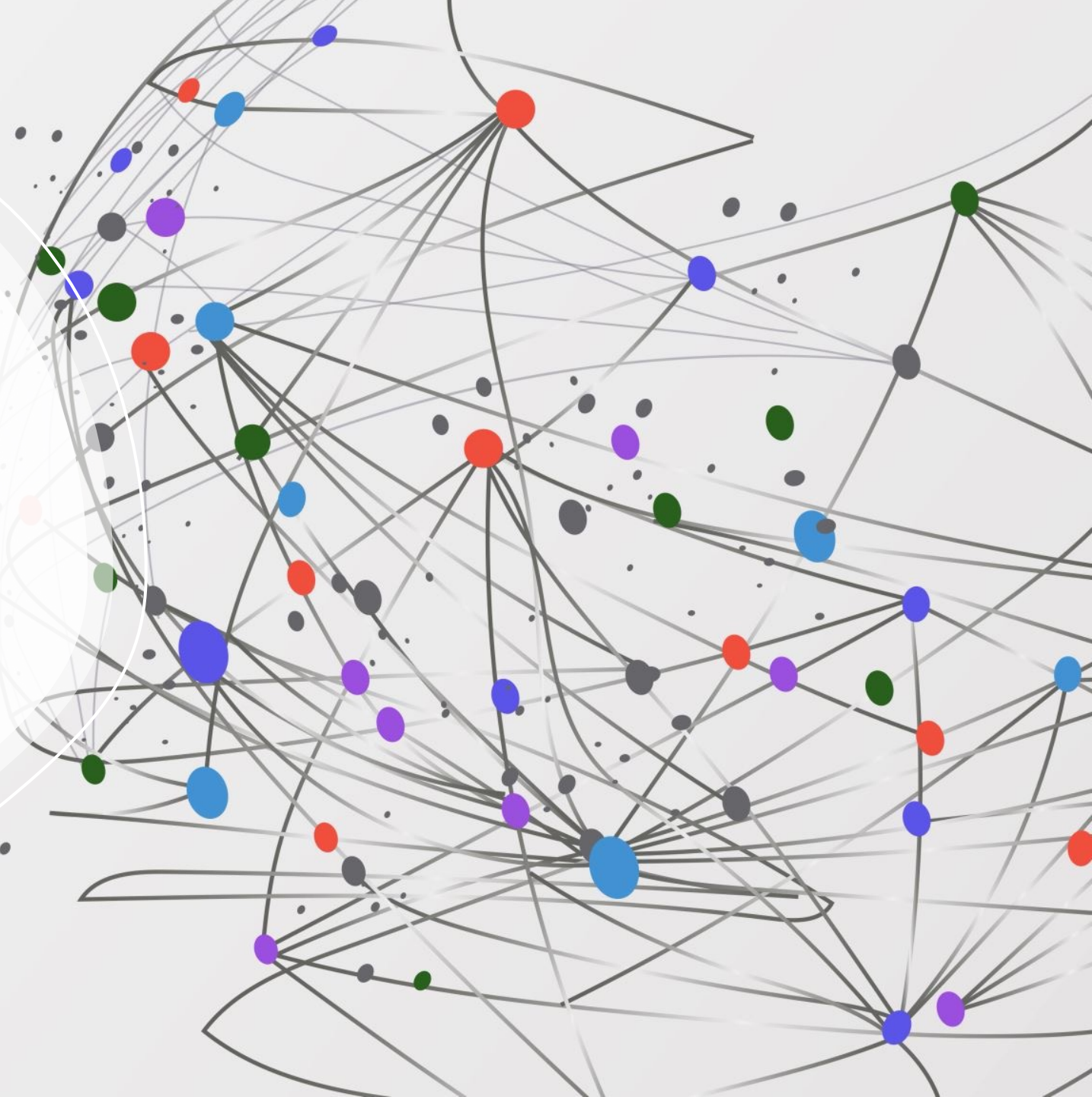


# LabCentral Orientation



# Overview

- Old Orientation
- New Orientation
  - Operational Changes
  - Tech Flow
- Learnings
- How Orientation V2 came to be
  - Lockdown
  - QB automations and Hive template Iterations
- Future
  - 610 orientation
  - 238 orientation
  - Automating all onboarding tasks



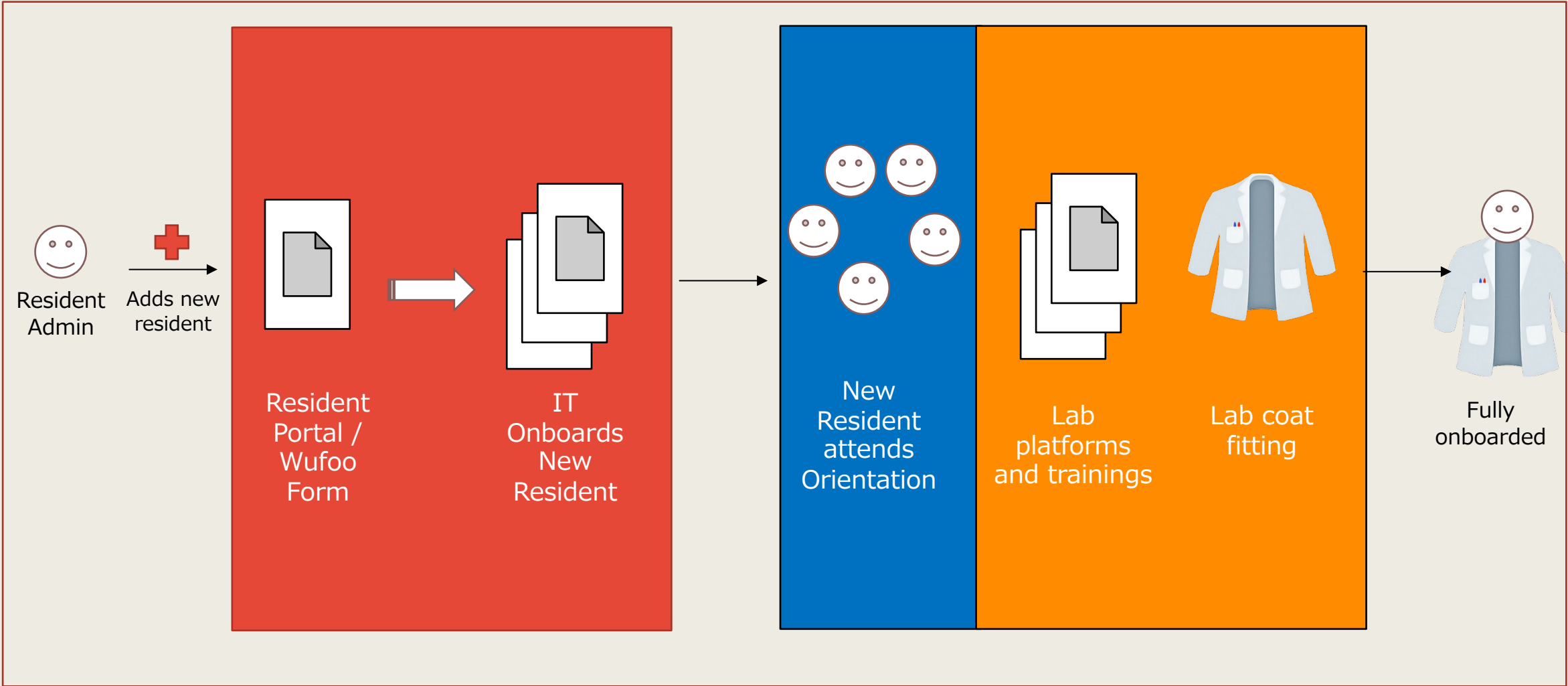
# Old Orientation Process

Operations Stream

IT  
Owned

Ops  
Owned

Lab Ops  
Owned





# **New Orientation Process**

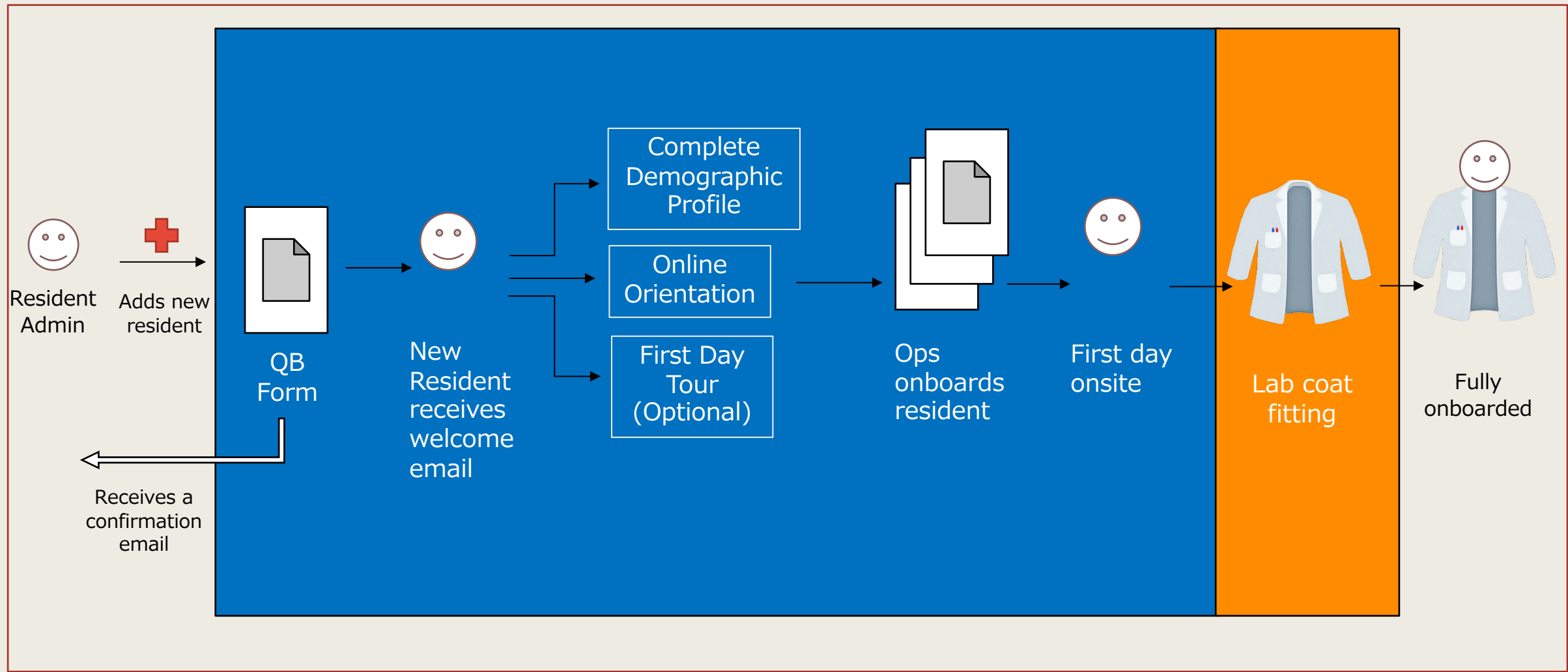
Operational Stream changes and Tech flow

# New Operational Stream

IT Owned

Ops Owned

Lab Ops Owned

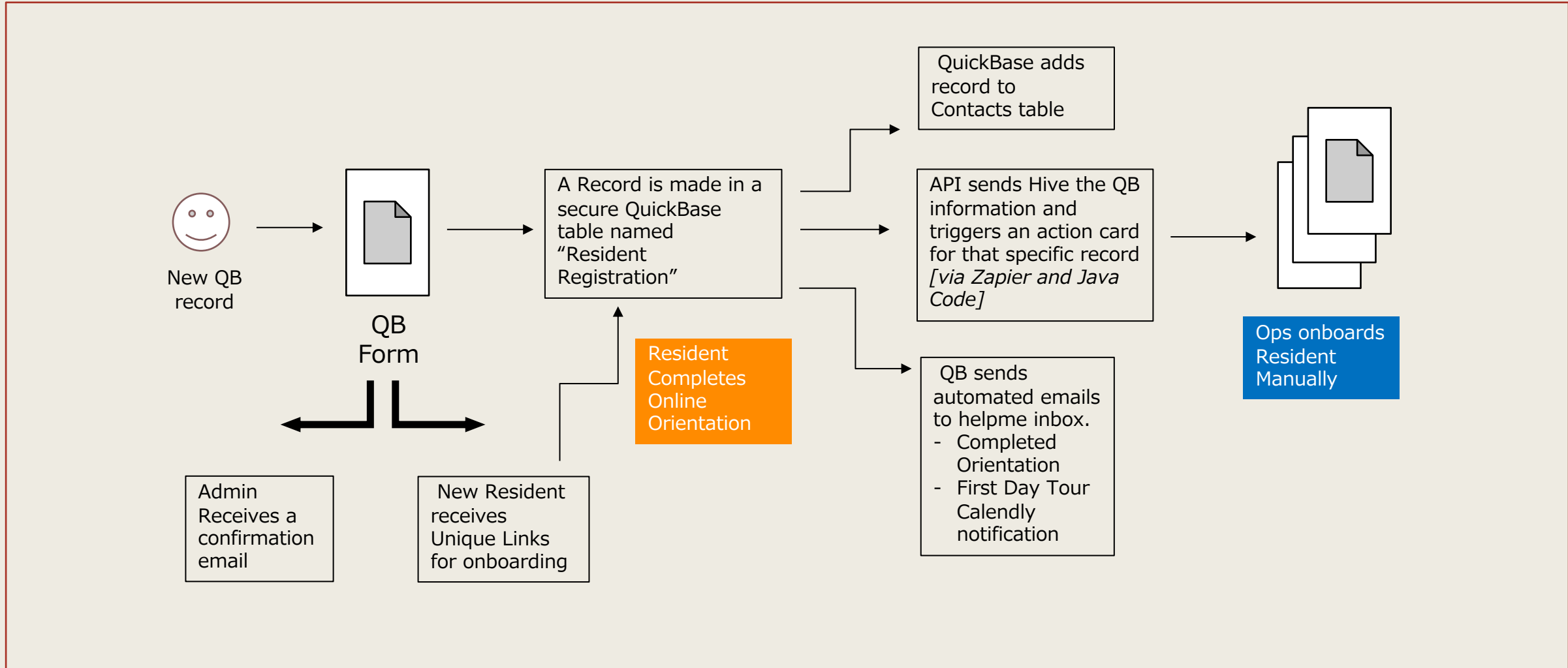


# Back-end Technical Flow

QuickBase Automations

Resident Action

Ops Actions





# **Learnings**



## Learnings from Old Process

- Everything was done via email or manually.
  - Because of this, there was a lot of redundancy and human error.
- This operational stream was not sustainable and could not scale.
  - Many departments involved. This could make the stream disgruntled as we grow.
- 3 ways for residents to get access without attending orientation.
- No efficient way of tracking where a resident is on their onboarding process.
  - No accountability system.

## Learnings from New Process

- Everything is tracked online. (tracking and accountability)
- Opportunity to acquire valuable data.
- Only 1 way for a resident to get access into LC.
- Human hours are given back to LC team.
- Minimal human error, only technical issues or bugs that can be fixed.
- The process is owned by 1 department and monitored by 2 (IT and Lab Ops)
- This online and decentralized system can be scaled to a larger volume.



# How Orientation V2 Came to Be

Lockdown, Covid Videos, QB and Hive

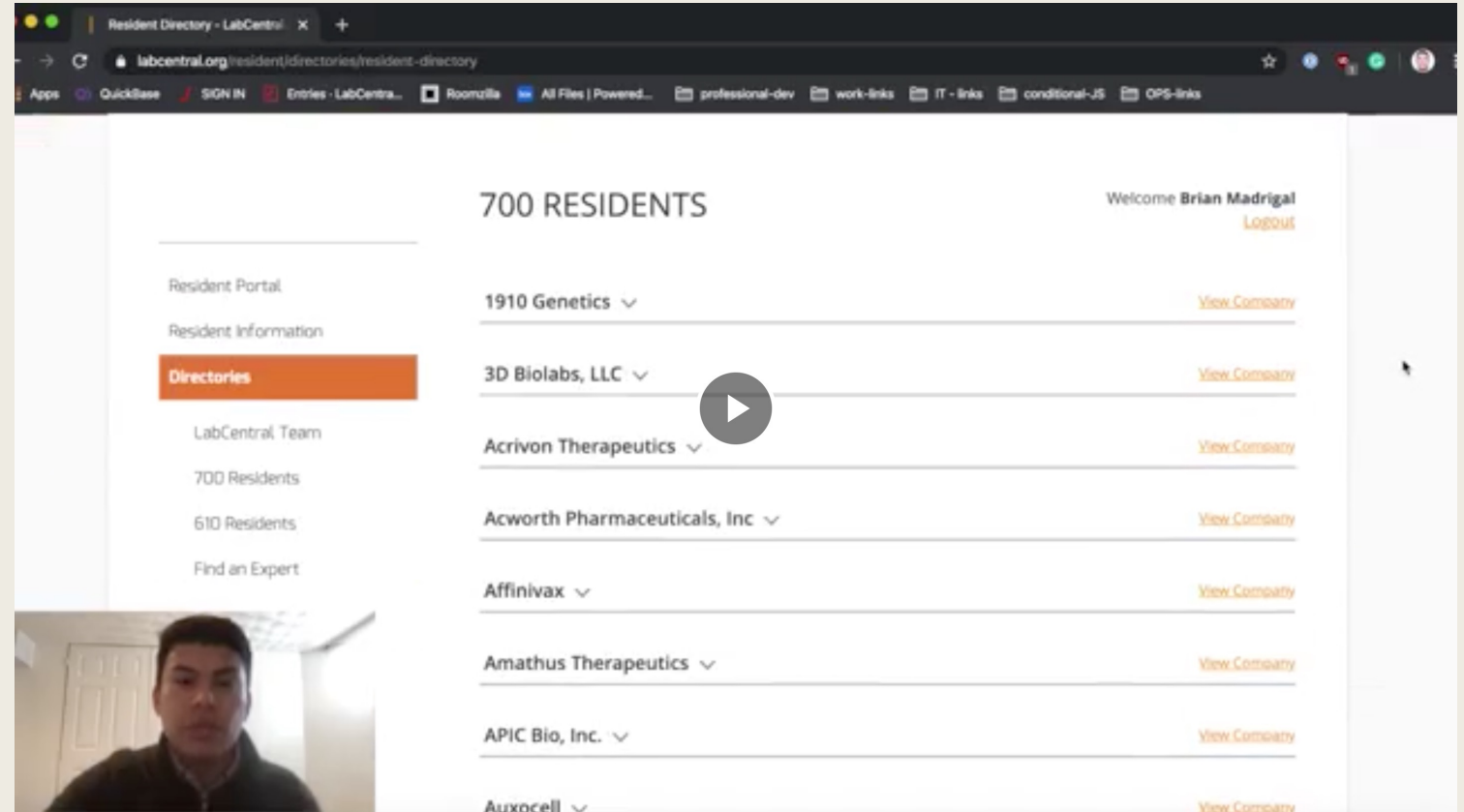
# COVID-19 Lockdown

MY first Video at LC

## "How to upload a photo to the Resident Portal"

Learnings:

- Ben took this idea of making training videos a step further. Instead of training LC team members, we were going to train and onboard Residents using videos.



The screenshot shows a web browser window displaying the LabCentral Resident Directory. The browser's address bar shows the URL `labcentral.org/resident/directories/resident-directory`. The page header includes the text "Resident Directory - LabCentral" and "labcentral.org". The main content area features a navigation menu on the left with options: "Resident Portal", "Resident Information", "Directories" (highlighted in orange), "LabCentral Team", "700 Residents", "610 Residents", and "Find an Expert". The main content area displays "700 RESIDENTS" and a list of companies, each with a dropdown arrow and a "View Company" link. The companies listed are: 1910 Genetics, 3D Biolabs, LLC, Acrivon Therapeutics, Acworth Pharmaceuticals, Inc., Affinivax, Amathus Therapeutics, APIC Bio, Inc., and Auxocell. A video player overlay is positioned over the "3D Biolabs, LLC" entry, showing a play button icon. In the bottom-left corner, there is a small video feed of a man speaking.

# Covid-19 Training Videos

## Iteration 1:

Dan developed a webpage that contains training videos, Quiz questions to validate the user watched the videos, and connects to QuickBase to store information.

### Learnings:

- Residents resonated with the videos and validated this prototype to be an effective form of training.



- \* How should a mask be placed when not being worn?
  - On a public mask hook
  - Exterior-side down
  - Interior-side down
  
- \* Which band plays the song Shauna sings in the video?
  - Fleetwood Mac
  - Toto
  - Metallica



# **QB and Hive Iterations**

Developing a streamlined onboarding process

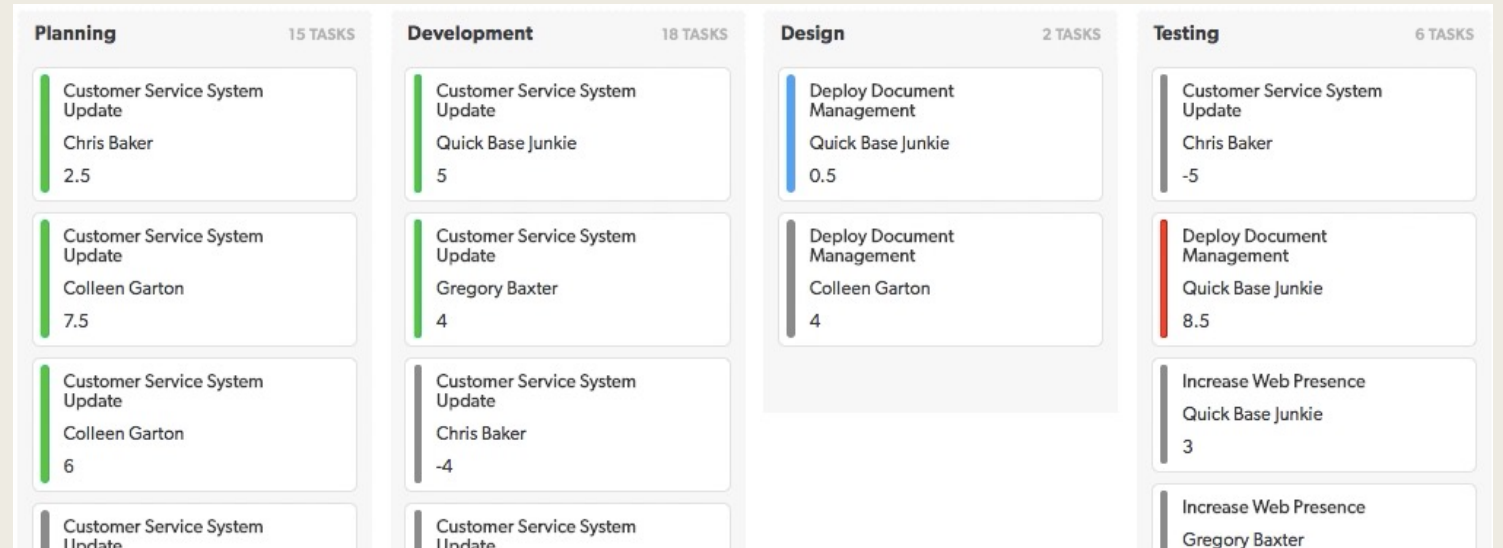
# Orientation V2 Iterations

## Iteration 1:

Patrick and Ben developed a Kanban report in QB

Learnings:

- The Kanban columns were split into tasks.
- No accountability system, Preeya and I had no idea who did which task in the onboarding process – this caused redundancy and more work.
- The information from QB was not organized properly.



# Orientation V2 Iterations

## Iteration 2:

Hive went live and Dan migrated the onboarding process to Hive. Shelby built the Hive project and organized the information into Categories and Labels.

### Improvements:

- All the information was organized into categories that represent each QB record type.
- QB record is shown as an action card.
- Relevant tasks pertaining to the QB record is nested within the action card.

### Learnings:

- We needed “quick access” information that helped us differentiate the QB record (scientist & leadership)

The screenshot displays the Hive interface with several key components highlighted by red boxes:

- Categories:** A horizontal bar at the top showing four categories: Resident Offboard (4), Company Onboard (5), Company Offboard (3), and Space Change (6).
- QB Record:** A grid of action cards. The first card, "Wen-Cheng Lu is leaving Rgenta LLC", is highlighted. It includes labels for "Onboarding/Offboarding" and "Resident Offboard", and a date "May 30" with a progress indicator "0/9".
- Tasks:** A list of tasks associated with the selected QB record, including "Add Expiration Date to Badge in Salto", "If leadership and/or scientist remove from 700 leadership and/or scientists MS Exchange groups", "Ban User in Salto", "Remove from Company Email List in MS Exchange", "Ban from Resident Portal in Expression Engine", "Delete from Printer Share", "Remove user from Yarooms", "If scientist, remove from LabScheduler", "If scientist, remove from Elemental Machines", and "New subaction".
- Filters:** A sidebar on the right with filters for "Dates" (May 30), "Status" (Unstarted), "Priority Level" (None), and "1 following" (Follow).

# Orientation V2 Iterations

## Iteration 3:

Dan improved the nested information.

Improvements:

- Quick Access information made onboarding a resident more efficient and allowed us to onboard the different types of people quicker.

The screenshot displays a software interface with several sections:

- Categories:** A horizontal bar at the top containing four categories: Resident Offboard (4), Company Onboard (5), Company Offboard (3), and Space Change (6). Each category has a 'Create new action' button and a user icon.
- QB Record:** A grid of record cards. The first card, highlighted with a red box, shows 'Wen-Cheng Lu is leaving Rgenta LLC' with 'Onboarding/Offboarding' and 'Resident Offboard' tags, and a date 'May 30' with a progress indicator '0/9'.
- Tasks:** A list of tasks with checkboxes and due dates. A 'Custom fields' popup is overlaid on this section, containing a form with the following fields:
  - Email:
  - Record ID#:
  - Procurement Training Date:
  - Web Portal Orientation Complete:
  - Cell Phone:
  - Leadership\_Scientist:
  - Position/Job Title:





# Future

238, scale, remote support, complete automation

# All Automated Technical Flow

QuickBase Automations

Resident Action

