User Guide for External Users

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Logging In:

External users will create an account using this link:
https://secure18.ideaelan.com/UMBC/Public/AppLogin.aspx
New User Registration Process:

- Users can register on the login page of the INFINITY link.
- Enter First Name, Last Name, Email ID, Password and click on Join Now Button.

  ![New User Registration Process Image]

- After registering, a confirmation message will appear on the screen. Click the verification link sent to the email provided.

  ![Registered successfully! Image]

- Once the email is verified, the page will be redirected to a registration wizard.
Click on the start button to go through the registration process.

In the next page, request access to your lab (Company Name or Institution Name) by clicking on “Request Access.” If your company is not already listed, create your lab using the “Add New Lab” button. Ensure that you add your company’s billing address and Federal Tax ID when creating the lab.

When creating the lab, ensure that you list yourself as the lab admin.

Set your lab to be your default lab and click on “Next”.
In the next page, request access to the desired facility. Note: You must fill out the facility access form in order to be approved for access by facility staff.

Next request access to applicable instruments within a facility. This can be done by clicking on “Request Access” on the right of each instrument. Fill out the corresponding instrument access form.

Click on Continue to exit the wizard.

The last part of the user registration process gives quick links to edit the user profile, reserve instruments, and/or submit a sample form. A search bar is also provided to search through the software.
The new user registration process is now complete. Please wait while the facility staff accepts your request as a facility user and the Institutional Admin will need to approve the lab that was created.

If you will be using instruments yourself, please complete the AUT password section under “My Profile”.
The Lab Admin/PI:

- Once logged in and approved as a Lab Admin, a toolbar with tabs will appear that are specific to your role.

Lab Admin Functions:

1. Lab Admin: To access all the lab admin features
2. Inbox: To view, accept and reject requests.
3. Lab: To add lab information, billing details such as account codes or purpose codes, and to access lab settings.
4. Facilities: To view and request access to various facilities listed.
5. Users: To add a user or to import/export users in bulk.
6. Reports: To generate and view usage/expense reports for users and labs.
7. Supplies: To create supply orders.
8. Select Lab: Choose the lab you want to access from the drop down list.

Lab Admin ➔ Inbox:

1. Lab Access Requests: To view, accept and reject user requests to the lab.
2. Invoices: To view, edit and accept invoices.
3. Sample Submission: To view sample submissions for the lab.
4. Projects: To view projects for the lab.
5. Dashboard: Displays the number of samples submitted, and the number of instrument reservations made.
6. Publications: Lab Admins should confirm that users have used a particular facility before the core can present their publications. Under Inbox ➔ Publications, Lab Admins as can view a list of user publications that facility admin have requested to claim under their core. The PI has the option to select “Yes” or “No.”
Lab Admin ➔ Lab:

1. Basic Details:
   - Select to fill out lab information

2. Billing Information:
   - For external users, we request that you provide your company or institutions billing address, as well as your company’s Federal Tax ID.

3. Lab Settings
   - Click to select an alternative lab admin and set invoice approvals.
   - Other lab details can be set under the Lab Settings section, such as: maximum amount a user can use from a grant; Invoice approval settings modified to allow an invoice to be approved manually or automatically; and a lab alternative.
   - Notifications: PI/Lab admin gets notifications.
Lab Admin ➔ Facilities:

- To view and request access to various facilities listed.

Lab Admin ➔ Users:

- All users affiliated with the lab/company are listed under the users tab. New users can be added one at a time by clicking on the “Add New User” tab on the top right side, or in bulk by clicking on “Import from excel”, to import a detailed excel sheet.
- Lab Admin can also remove user access to the lab by clicking the green check mark under the “Status” column.

- The list of users can also be exported as word, excel or PDF document.
Lab Admin ➔ Reports

- The Lab Admin can generate various lab based / project based reports, to study the expenses of the lab, instrument usage by users affiliated to it, etc.
- Select the report type from the dropdown menu, enter the required data range and click on run report. Options to save the report are available. You can also export the report as a Word or PDF document.

Lab Based Reports
Project – Lab Based Reports

Lab Based Reports

Expenses over period
Month over month Usage Report

Filter Options
Select saved report selection(s)
Report name: Select Report Name

Date Range: Monthly September 2020

☐ Select All
☐ Project
☐ Chart/Log

Note: By default, the report will be generated for all the attributes. Please check the checkbox beside the attribute to filter the report.

RUN REPORT SAVE & RUN REPORT CANCEL
To Access Facilities

- To request access to other facilities, hover over the 9 square box and click on the blue DNA icon on the far right.

- All facilities within the institution will be listed.

- Click on “Request Access” to request access to the facility you want to use. Depending on the facility settings, a manual approval may be necessary.
To Access Instruments

- To request access to instruments, hover over the instrument on the calendar, click on Request Access.
- All Instruments within the facility will be listed.

- The user will need to complete the instrument access request form. Once completed, approval will be given by the facility admin.

- Once the facility staff approves the request, the user will then be able to make reservations.
The User:

- Once logged into INFINITY as a user, a toolbar with tabs will appear that are specific to your role.
- The “9 square box” tool provides the quick links to access facilities, contact Idea Elan, Facility admins, Help files etc.

User Functions:

1. View a home page that has specified favorite instruments and sample submissions, reservations, submitted samples, issues, service requests, and user profile.
2. Request instruments in a facility and make reservations under the instrument tab.
3. Submit sample forms for processing in Request Services tab.
4. Place supply orders for new supplies from facilities under the supplies tab.
5. Select the facility from dropdown box for which you want to access the details, such as instruments, sample submission etc.
6. Start page: Click here you can make your current page as the start page.
7. My Items List: with quick links to homepage icons, my favorite instruments, favorite requests, etc.
My Home Page:

1. **My Favorite Instruments**: Displays Instruments set as favorite with a calendar to aid in making quick reservations.
2. **My Favorite Requests**: Displays all sample submission forms and service requests set as favorite by the user.
3. **My Reservations**: To view the instrument reservations made by the user.
4. **My Requests**: To view sample submissions or service requests made by the user.
5. **My Supplies**: To view submitted supply orders.
6. **My Projects**: To create and view all the projects assigned.
7. **My Reports**: Generate reports based on usage across various facilities, instruments, and sample submissions.
8. **My Profile**: Displays the profile of the user; labs and facilities affiliations of the user.
9. **My Dashboard**: Displays the number of samples submitted, and the number of instruments reservations made (graphical representation).
10. **My Publications**: For reviewing and accepting publications made by the user.
11. **My Agenda**: User can save the tasks to be performed in a day, week, or month with priority.

**Publications:**

Users can keep track of their publications using Idea Elan. The feature allows for users to sort through and view their previous works. Also, facility admins have the ability to request that users’ publications be present under their facility to accreditate the core. Users have the option to select yes or no.
Instruments

How to make a reservation:

- Click on Instruments tab to view the calendar for instrument reservation.
- The User can filter instruments using filter options.
- Calendar can be seen in day/week/month view based on the selection.

Reservation as a user:

- Select an instrument, drag on the calendar to create a reservation.
Confirm the usage fee and click on OK.

- A reservation will be created.
How to make a wait-list appointment:

- When User A has created an appointment and User B wants to have the same slot for the same instrument, then User B creates a wait list appointment by clicking on the appointment created by User A. Then click on SAVE.

How to get help or report an issue:

- Hover over each instrument to show the description and options for that instrument.
- To reference SOPs and other instructional materials for that instrument, select “Help Files”.
- To report an issue while using the instrument, select “Report an issue” to alert facility staff.

- Users can also contact facility staff directly though the software by clicking the 9-squares and selecting “Contact Facility Admin”. From there, users can select which admin they would like to contact and send an email through Infinity.
How a user deletes a reservation:

- When the User hovers over the appointment to be deleted, an X symbol appears. Click on X to delete the appointment.
Request Services

- Sample submission forms are provided for each facility under the “Request Services” tab. Forms can be favorited for quicker access.

- To submit a sample form, click on the form name. Fill in the necessary details pertaining to the samples.
To submit samples, you can select one of the 2 options:

- Option 1: Select the number of samples in the textboxes below and click go.
- Option 2: Download a sample submission excel template, enter the details and upload the file.

### Option 1

<table>
<thead>
<tr>
<th>Sample Name</th>
<th>Sample Format</th>
<th>Storage Requirements</th>
<th>Safety Precautions</th>
<th>Quantity (Concentration include units)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Select</td>
<td>Select</td>
<td>Select</td>
<td>Select</td>
<td>Select</td>
</tr>
</tbody>
</table>

AutoComplete: On/Off

Add more samples, enter number of rows to add.

### Method

**Method**

- **Use this section to specify a simple temperature ramp or describe a more complex method below. You may also link or upload an academic paper describing the method you wish to use.**

- **Start Temperature**
- **Stop Temperature**
- **Temperature Ramp**
- **Additional Details e.g., multiple ramps, hold steps, etc.**

**Upload Method**

### Report

**Standard Report**

- All reports include the following information: objective, instrumentation, method, and a weighted vs temperature curve for each sample.

Describe any additional items to include in report (e.g., ASCII files, derivations)

### Additional Information

**Additional Information**

**Additional Information Upload**

### Lab and Payment/Account Information

Please select the lab and chart string you want to tag this sample submission form to:

- **Phone:** 555-555-5555
- **Projects:** Not Applicable
- **Lab:** Lab1
- **Chart String:** Twsl1234

**Special Instructions:**

Sample Submission cannot be modified.

Your Sample Submission will be saved in My Requests under My Monogram.
- After filling out the sample submission form, select the lab. This can be set to default for the most often used lab.
- Select the Account code you wish to use. The number can also be split for multiple charges as well as defaulted for quicker access.
- Once the form is ready, click on “Submit”. The form cannot be modified once submitted.
AUT – Actual Usage Tracker

• A full screen will be opened to Login. Enter the Email ID and Password. Ensure that you have already created your AUT password under “My Profile”.
• You will have the option to select a scheduled appointment or begin an unscheduled session.

• Click OK and the AUT starts running.
• Click Logout to end the session.