Contents

Logging In: ............................................................................................................................................. 3

New User Registration Process: ........................................................................................................... 4

The Lab Admin/PI: .................................................................................................................................. 6

PI Functions: ......................................................................................................................................... 6

PI ➔ Inbox: ........................................................................................................................................... 7

PI ➔ Lab: ............................................................................................................................................... 7

1. Basic Details: ..................................................................................................................................... 7

2. Billing Information: ............................................................................................................................ 7

3. Lab Settings.................................................................................................................................... 8

PI ➔ Facilities: ......................................................................................................................................... 9

PI ➔ Users: ........................................................................................................................................... 9

PI ➔ Reports: ....................................................................................................................................... 10

Lab Based Reports ................................................................................................................................. 11

Project – Lab Based Reports ................................................................................................................. 11

Publications .......................................................................................................................................... 12

To Access Instruments ........................................................................................................................... 12

The User: .............................................................................................................................................. 13

User Functions: .................................................................................................................................... 14

My Home Page: .................................................................................................................................... 14

Instruments ........................................................................................................................................... 15

How to make a reservation: .................................................................................................................... 15

Reservation as a user: ............................................................................................................................. 15

How to make a wait-list appointment: ................................................................................................... 17

How to get help or report an issue: ......................................................................................................... 18

How a user deletes a reservation: .......................................................................................................... 19

Request Services: ................................................................................................................................. 19

AUT – Actual Usage Tracker ................................................................................................................ 21

AUT – mobile app ................................................................................................................................. 24
Quick Startup Guide for PI’s/ Lab Admin

Logging In:  https://secure18.ideelan.com/UMBC/Public/AppLogin.aspx

For Internal: Users/PIs will login using your UMBC user ID and Password
New User Registration Process:

- Users should sign into the SSO using their UMBC username and password
- Once logged in, users should start the Setup Wizard.

• In the next page, create your lab by selecting “Add New Lab”.

• Lab admin/PI should fill out the basic lab details, as well as the billing information, when creating the lab. Add appropriate Lab Admin user or select “Self”.
• Lab admin/PI are presented with the option to select between the billing types such as “Use my Chartstring,” “PO Number,” or “Bill Me Later.” **For all UMBC labs, we required that PI’s enter chartstring in this format:**
  - Fund (4 digits) - PFin (three digits) - Dept (five digits) - Project (eight digits)

• Once you have created your lab, set it as your default lab and select “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 is the option to request access to instruments within a facility, if you need physical access. This can be done by clicking on “Request Access” on the right of each instrument. Fill out the corresponding instrument access form. If this is not needed, select continue to proceed to the User menu. At this point, the Institutional Admin will need to approve the lab that was created.

The Lab Admin/PI:

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

PI 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.
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: PI’s should confirm that users have used a particular facility before the core can present their publications. Under Inbox ➔ Publications, PI’s 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.”

PI ➔ Lab:

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

2. Billing Information:
   - PI’s can select between the lab types such as “Use my Chartstring,” “PO Number,” or “Bill Me Later.” **For all UMBC labs, we required that PI’s enter chartstring in this format:**
     - Fund (4 digits) - PFin (three digits) - Dept (five digits) - Project (eight digits)
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.
**PI ➔ Facilities:**

- To view and request access to various facilities listed.

**PI ➔ Users:**

- All users affiliated with the lab 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.

- PIs 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.

**Pl ➔ Reports**

- The PI 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.
Publications

- **PI’s/ Lab Admin should confirm that users have used a particular facility before the core can present their publications.** Under Inbox> Publications, PIs 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.”

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:

• Lab admins and PIs also have the regular user functionality of Infinity as well and can reserve time on instruments and request sample processing.
• 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 individual 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.

**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.

**Confirmation**

Total Usage Fee: 10.00 USD
Are you sure want to continue

- OK  CANCEL

• 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.

• A wait list appointment will be created.
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 and PI’s 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.
Thermal Analysis

This form is for submission of samples for thermal analysis. Please fill out as much information as possible on this form to help the staff provide the best analysis possible.

Please submit samples accompanied by completed form to:

Joshua Wilhide
UMBC Chemistry Building Rm 100
Baltimore, MD 21250
Phone: 410-455-2615
Email: wilhide@umbc.edu

Instrument

| Instrument | TGA (Thermogravimetric Analysis) |

To submit samples, you can select one of the 2 options:

- Option 1: select the number of samples in the textbox below and click Go
- Option 2: Download a sample submission excel template, enter the details and upload the file

Enter number of rows to start with: 4

<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>
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</table>

Add more samples, enter number of rows to add: 4
After filling out the sample submission form, select your lab. This can be set to default for the most often used lab.

Select the Chartstring 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.
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.

AUT – mobile app

- Download the AUT mobile app and log in following instructions from facility website <insert link>.
- To record actual usage, select the three bars at the top left to open the menu. Select instruments.
• Select “Options” of the instrument and click on “Start Actual Usage” option.

• Select all the desired options and click Start Usage
• Click Yes to confirm the usage

• Click Stop to stop the usage
- Click Yes to confirm