Idea Elan

GHENT UNIVERSITY

Infinity Core Management Software
2020

User Guide

Comprehensive Online Solution for
Lab and Core Facility Management

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Contents

Quick Startup Guide

Links to recorded Training Webinar:

User Training Recording:

https://us02web.zoom.us/rec/share/v94yF-vy-jlOBaPu1W_dHZEhLNz7eaa8gCgWq_IExExHLCHCdcOrEW0BBay0w7rv

PI/Lab Admin Recording:

https://us02web.zoom.us/rec/share/6vR2BID0qExOAZHL0XHuZv8BJ7T-T6a81XRNqPZZn0Zry6cXYJ4fZTV_DHiXNhse

Login for Internal Users:

Users with a Ghent University login ID can use their credentials to login and will be redirected to the Infinity page.

1. Login via Citrix Athena

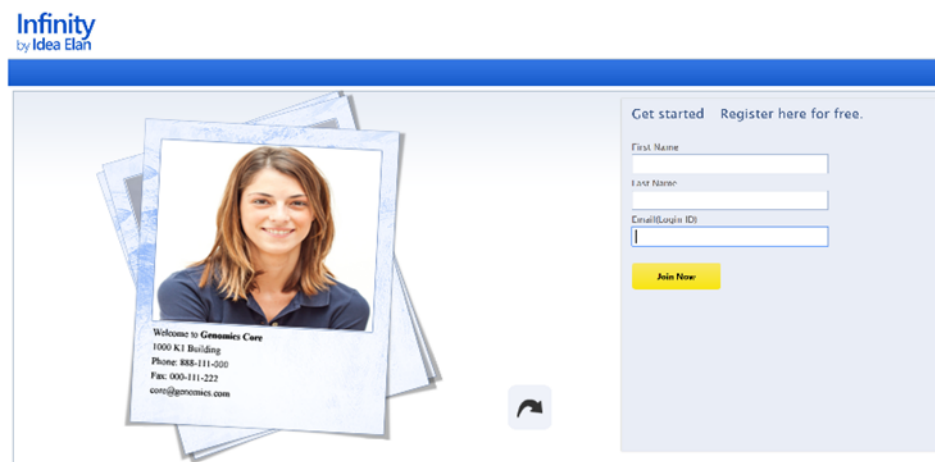## 2. Login using: https://cfms.ugent.be

UGhent Registration and Login for External Users:

External users will use the Infinity page to register for a UGent Welkom account.

Users will fill out their information under "Get started, register here for free."

External Users link: https://secure9.ideaelan.com/UGhent/Public/AppLogin.aspx

- Enter First Name, Last Name and Email ID click on Join Now Button.
- After registering, a confirmation email will be send to your account.
- Click the link provided to set up your password.

- Once the password has been created, external users can login via the link

→ https://cfms.ugent.be

New User Registration Process:

- Once users enter their credentials on the UGhent registration page, they'll be redirected to the Infinity site and the registration wizard will appear.
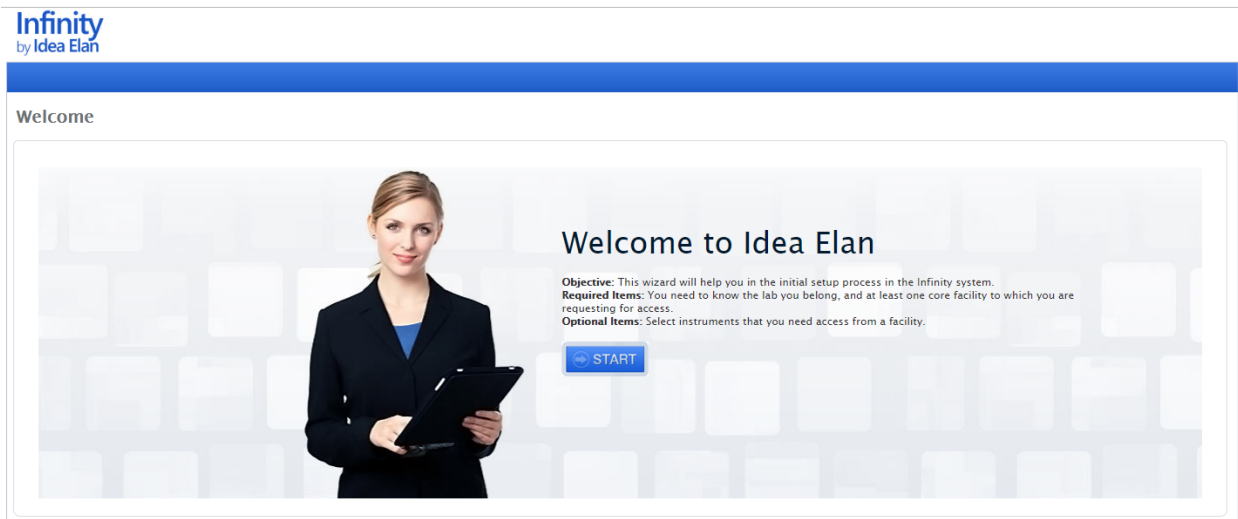
- Click on the start button to go through the registration process.

- On the next page, select access to labs/PI's by clicking on "Request Access."

Note: most access requests need manual approval from the PI, others may be automatically approved (based on lab settings)

- On the next page, select access to facilities.
- The facility admin can decide whether to automatically approve or manually approve, depending on their facility settings.
- In some cases, facilities require facility access forms to be filled out.

- Now request access to applicable instruments within a facility.
- This can be done by clicking on "Request Access" on the right of each instrument.
- Instrument access request forms may also be applicable.

- Click Continue to exit the wizard.

- The new user registration process is now complete.

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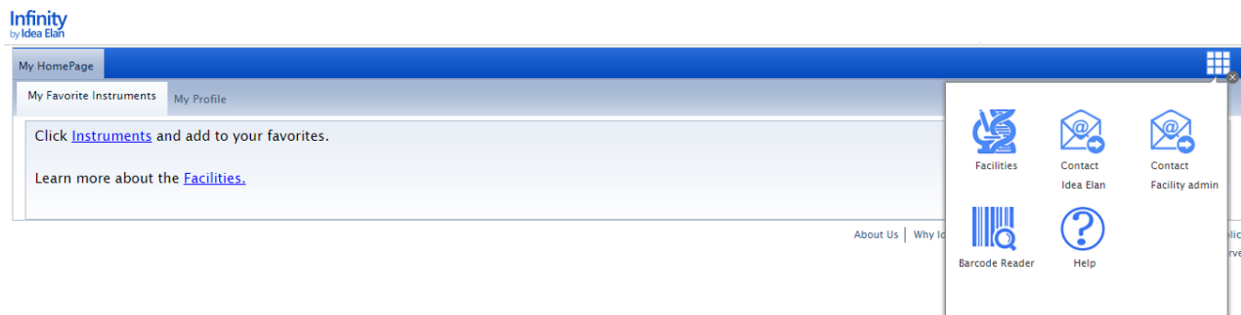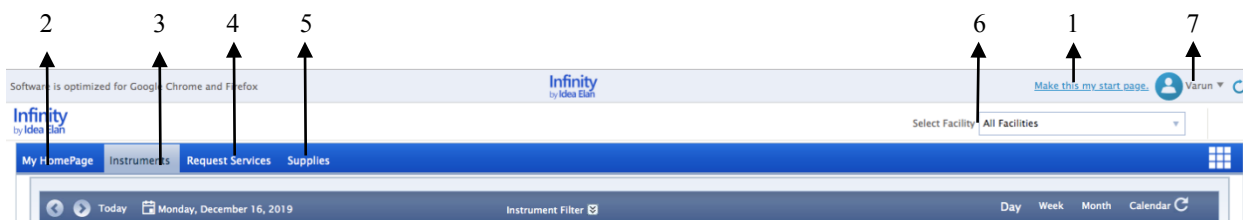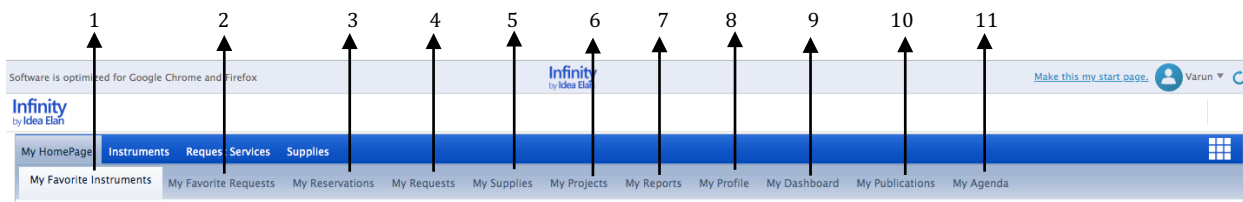6. **Select the facility** from dropdown box for which you want to access the details, such as instruments, sample submission etc.
7. **My Items List:** with quick links to homepage icons, my favorite instruments, favorite requests, etc.
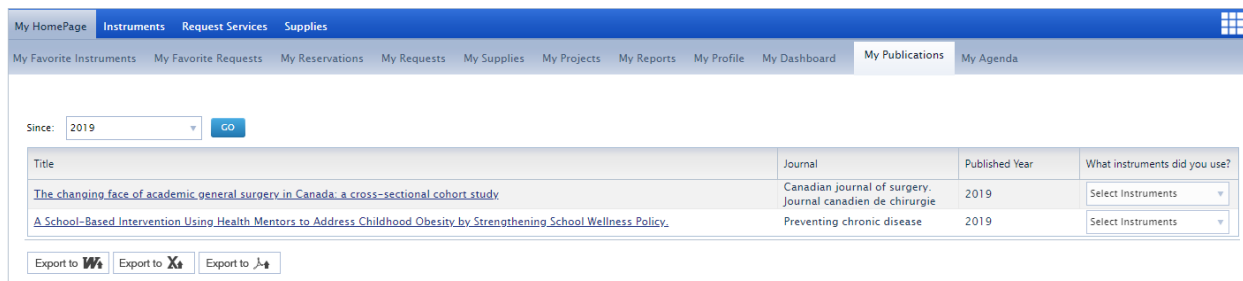
My Home Page:

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 a favorite by the user.
3. **My Reservations /My Files:** To view the instrument reservations made by the user and user can upload files on cloud. For viewing and uploading files/documents 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 / month with priority.
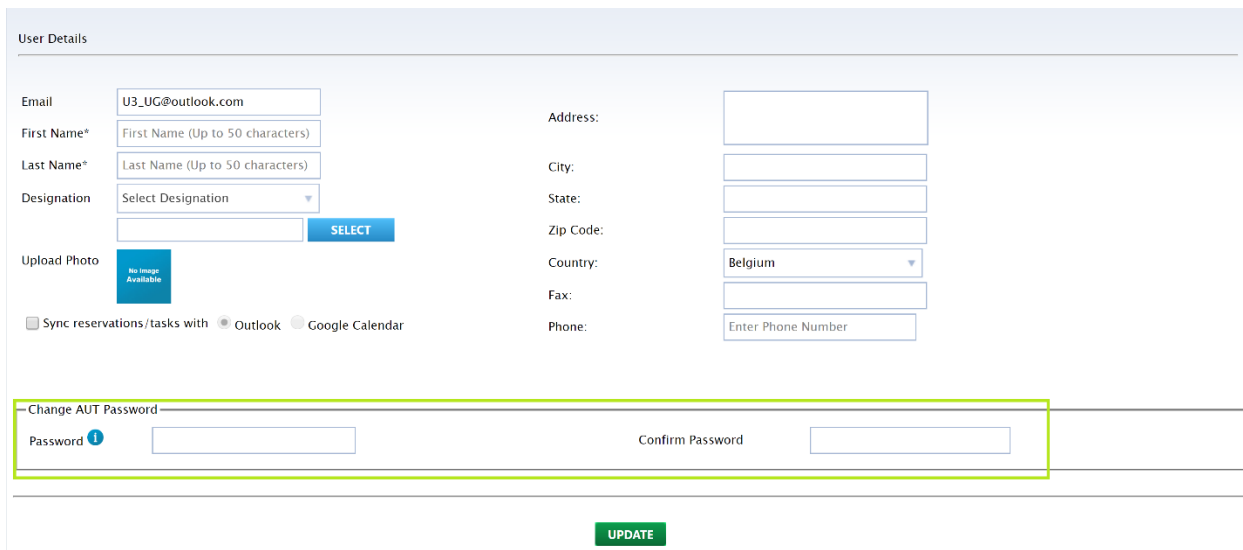
My Publications:

Users can keep track of their publications using Idea Elan. The feature allows for users to sort through and view their published papers. Also, facility admin have the ability to request that a users publication is present under their facility to accreditate the core. Users have the option to select yes or no. (Publications are pulled from pubmed).


AUT Password

- If your facility is using an Actual Usage Tracker application to record the login and logoff time on the instrument, you will need to set your password.
- You can set or change your password under 'My Profile'

Instruments

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.
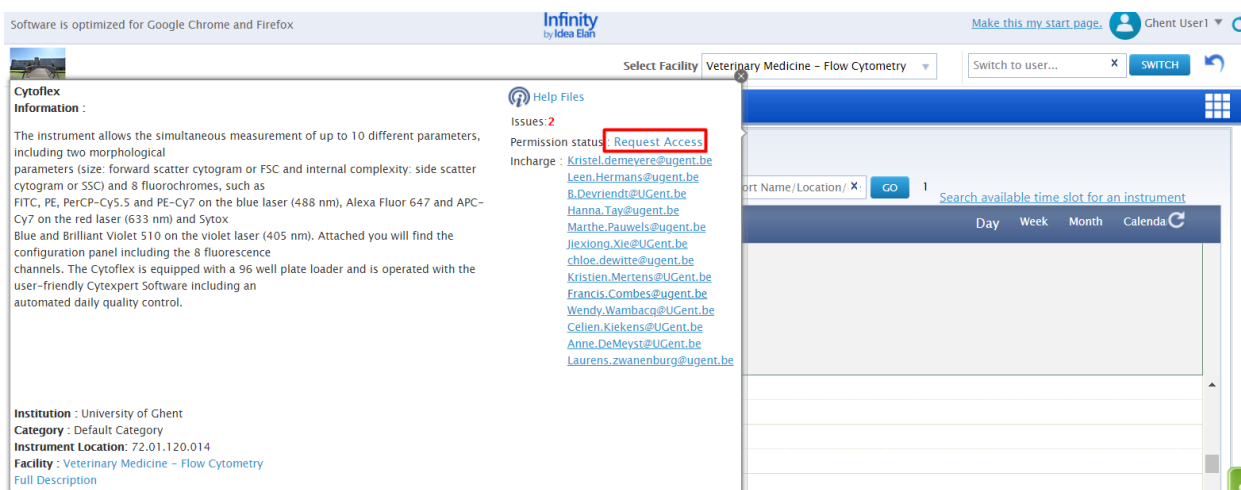
- Some instrument may require an access request form to be filled out
- Access Requests may get automatically approved or may need approval from the Facility Admin (depending on facility settings).
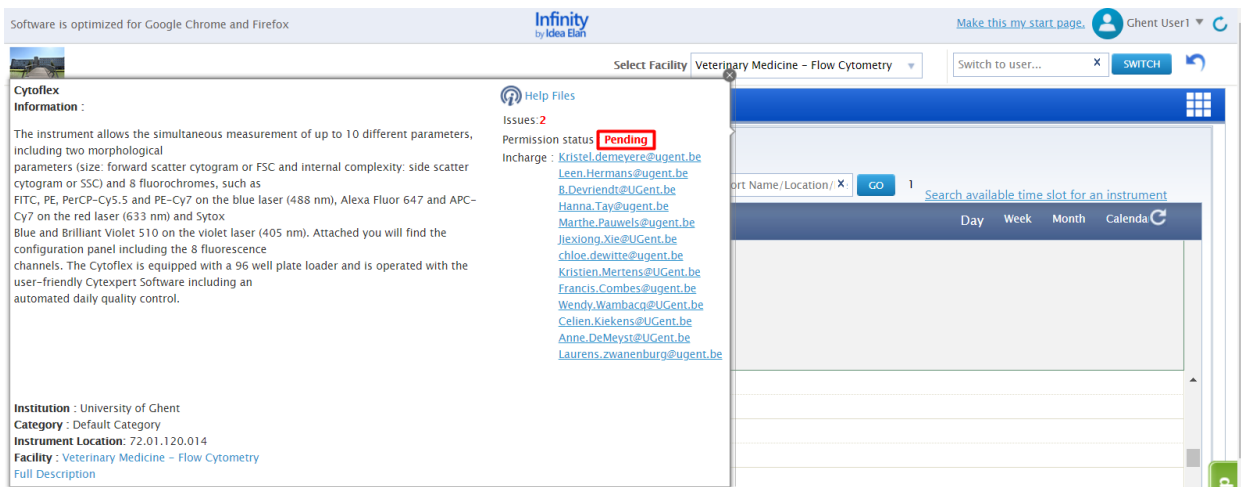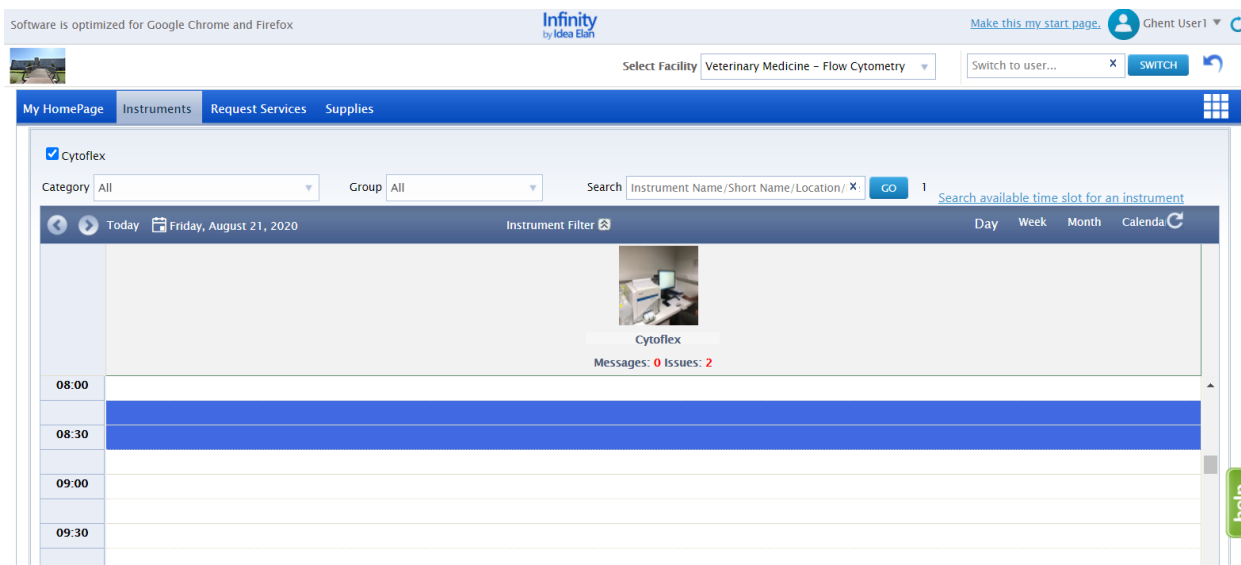

- Once the access request has been approved, the permission status will say 'allowed' and reservations can be made

How to make a reservation:

- Click on the Instruments tab to view the calendar for instrument reservation.
- User can filter instruments using the filter option.
- Calendar can be seen in day / week / month view, based on the selection.
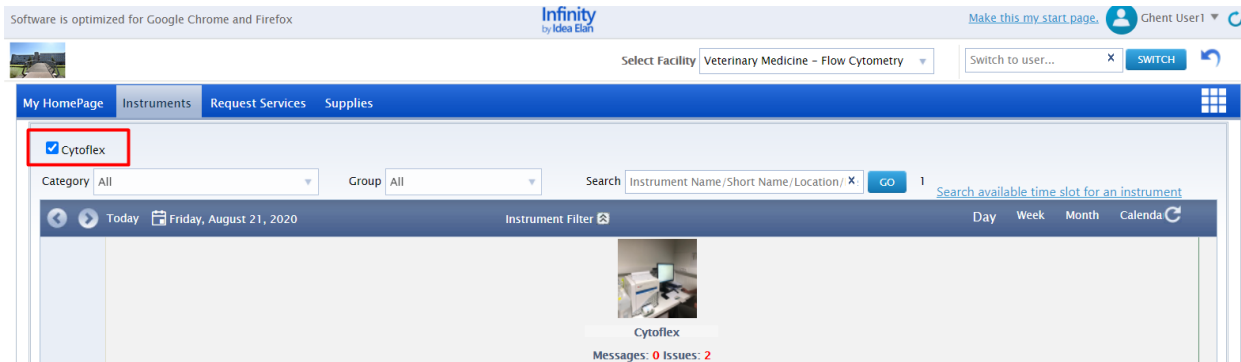
- Select an instrument, drag on the calendar to create a reservation.

- In the reservation window select your lab affiliations, account code (or PO number- for external users) and session type. Project affiliations may be applicable in some cases.
- Some session types need approval from the facility admin and will display in red, once the reservation is confirmed the reservation will display in green.
- Session type selections may vary in the facilities and service types have to also be selected

- Once all information is provided, click "submit" and confirm the usage fee and click OK.
- A reservation will be created.

Confirmation

Total Usage Fee : 8.00 EUR
Are you sure want to continue

OK   CANCEL

How to create a wait-list reservation:

- When **user A** has created an appointment and if **user B** wants to have the same slot for same instrument, then **user B** creates a wait list appointment by clicking on the appointment created by **User A. Click on SAVE.**
- A wait list appointment will be created.

INFINITY **Create Waitlist For Cytoflex**   ✕

Add to Waitlist	Rules & Policies

| Subject:	Ghent User3	
Start time:	21-08-20 08:15	
End time:	21-08-20 08:30	
Phone:		
Project/Membership:	Not Applicable ▼	Set as default
Lab*:	Select Lab ▼	Set as default
Account Code*:	▼	Set as default
Session Type:*	Unsupervised ▼	

SAVE   CLOSE

How to delete a reservation:

- When a user hovers over the appointment to be deleted, an X symbol appears. Click on X to delete the appointment.

How to start the time tracker for your reservation:

- Users of can start and stop the actual usage tracker right from the calendar reservation
- To start the tracker, users have to click on the green dot on the reservation
- Once the instrument use is completed, users have to click on the red dot to stop the timer
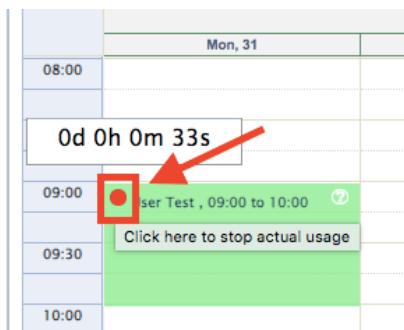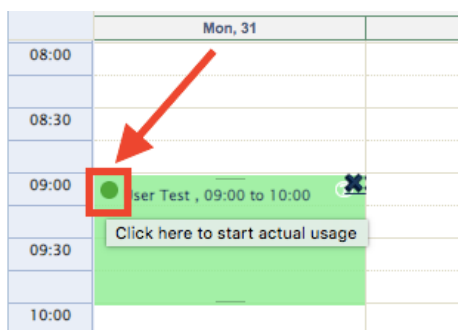
Request Services

How to fill out and submit a request form

- Sample submission or service request forms are provided for each facility under the "Request Services" tab. Forms can be favorited for quicker access.
- All the Help files uploaded by the admin while creating sample submission form can be seen beside the favorite icon.

- To submit a request form, click on the form name. Fill in the necessary details pertaining to the samples/services.

- After filling out the request form, select lab and account code information.
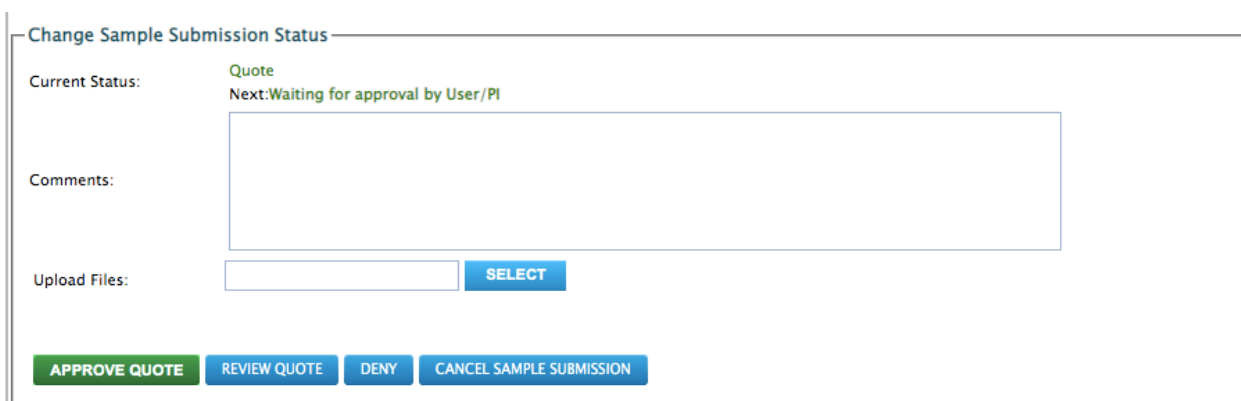- Once the form is ready, click on "Submit". The form cannot be modified once submitted.

Request Form Status:
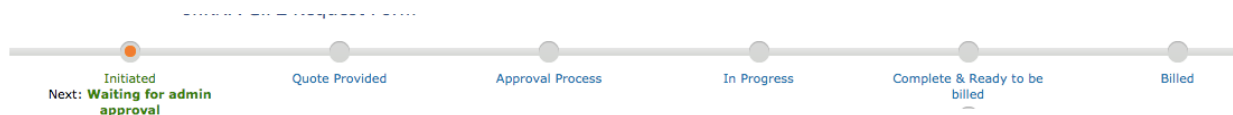
- After submitting the request form, a timeline will appear
- Depending on facility settings, some forms may undergo the quote process and others may skip this status
- Users can check on the current status by going to My Homepage → My Requests

Quote approval:

- If a quote has been provided by the Facility Admin, Users or PI's can approve the charges. (depending on lab settings)
- A comment or a file can also be added to the status section of the form.

Change Sample Submission Status

Current Status:	Quote Next: Waiting for approval by User/PI
Comments:	
Upload Files:	SELECT

APPROVE QUOTE   REVIEW QUOTE   DENY   CANCEL SAMPLE SUBMISSION

Supplies

Note: Currently no supplies are offered by any of the facilities

How to submit a supply order:

- Some facilities provide supplies that are essential for the instrument or analysis.
- Clicking on the "Supplies" tab on the user toolbar redirects to the page that displays the facility and the products available. Click on "**Order Supplies**" to order the supplies.
- Select the specific products by clicking on the check box near the item name. Then specify the quantity and click on "**Create an Order**".
- The lab name and code need to be added while ordering supplies, or a default lab and account code can be set for a user.

To Access other 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.

- If the facility settings are set as auto approvals, then the request will be auto approved.