INFINITY

Comprehensive Online Solution for Lab and Core Facility Management

User Guide

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Quick Startup Guide

Login Instructions

Internal Users
Users with University of uOttawa login ID can use their credentials to log in and will be redirected to Infinity.

Internal User Login URL: https://secure17.ideelan.com/secure/Public/AppLogin.aspx

External Users
External users will use the Infinity start page. Existing users can enter their information in the top right corner for username and password. New users will have to register below under: “Get started, register here for free.”

External Users Login URL: https://secure17.ideelan.com/uOttawa_Test/Public/AppLogin.aspx
Note: most access requests need manual approval from the PI, others may be automatically approved (based on lab settings).

- Now, select a default lab and click on “Next”.

- In the next page, select access to facilities.
Note: 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.

- Next 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 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.
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. **Instruments**: view and request instruments from the calendar in a facility and make reservations.
3. **Request Services**: Submit sample forms/ service requests for processing.
4. **Supplies**: Place supply orders for new supplies from facilities.
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 Reports**: Generate reports based on usage across various facilities, instruments, and sample submissions.
7. **My Profile**: Displays the profile of the user; labs and facilities affiliations of the user.
8. **My Agenda**: User can save the tasks to be performed in a day, week, or month with priority.

**Instruments**

How 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.
- Users may need to complete an instrument access request form depending on the facility settings. Once completed, approval will be given by the facility admin.
- Depending on the facility settings, a manual approval may be necessary.
• If the settings are set as auto-approve by the admin, then the request will be automatically approved. The user will then be able to make reservations.

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.

• Select an instrument; drag on the calendar to create a reservation.
• In the reservation window, users must select their Lab, PO, and Session Type.

• 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.

- A wait list appointment will be created.

How to delete 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
How to fill out and submit a request form

- Sample submission 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 the sample submission form can be seen beside the favorite icon.
- If the User faces any issue while using the sample submission form, he/she can directly report using the Report Issue icon beside the Help icon.

To submit a sample form, click on the form name. Fill in the necessary details pertaining to the samples.

- Some forms may have multiple sections and fields, which will expand depending on the answers selected.
- Once all information has been provided, the last section at the bottom of the form is “Lab and Payment/Account Information”.
_users can provide phone number, project/membership if applicable, select the Lab, and PO Number. This can be set to default for labs most often used.

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.

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 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.
Cancel a Request Form:

- To cancel a request form, the user can click on an existing request under My Request and cancel the form.

Supplies

How to submit a supply order:

Note: Supplies may only be available in selected facilities.

- 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.
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-approve, then the request will be automatically approved.