Idea Elan

Scripps Research
Science Changing Life

Idea Elan's Infinity Core Management Software

2020

Comprehensive Online Solution for Lab and Core Facility Management

User Guide – Scripps Microscopy Core

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Contents

Quick Startup Guide

Links to recorded User Training Webinars:

- Registration and Profile Wizard:
  https://us02web.zoom.us/rec/share/N4sOf10CYqVB7l4CC4WP6U6oqrEnXNO86yzJIIFrqo0AfeLsc4eBC4sjyPfdY0y8.F83qXW-W5NRgmBsY?startTime=1602786444000

- Instrument Access, Reporting Technical Issues, and Booking Reservations:
  https://us02web.zoom.us/rec/share/aRZVoJ8yZ9uze_ZvMbX2r_Uy_Dlfub5n8hNInDWeutdt8aCcCiMkiuK-kQwrmHPy.sBYKIq2vl_soxWhM?startTime=1602788062000

- Request Services:
  https://us02web.zoom.us/rec/share/rXGTpReR5vkyIVRxHrs15f4nh4rJxhjfBX9IrfKg-CDdZ7RJzyKyEwiMZthtKoLu.H_LBxYytTz9KVtwc?startTime=1602799551000

- My HomePage:
  https://us02web.zoom.us/rec/share/rXGTpReR5vkyIVRxHrs15f4nh4rJxhjfBX9IrfKg-CDdZ7RJzyKyEwiMZthtKoLu.H_LBxYytTz9KVtwc?startTime=1602800012000

- Help Features:
  https://us02web.zoom.us/rec/share/rXGTpReR5vkyIVRxHrs15f4nh4rJxhjfBX9IrfKg-CDdZ7RJzyKyEwiMZthtKoLu.H_LBxYytTz9KVtwc?startTime=1602800478000

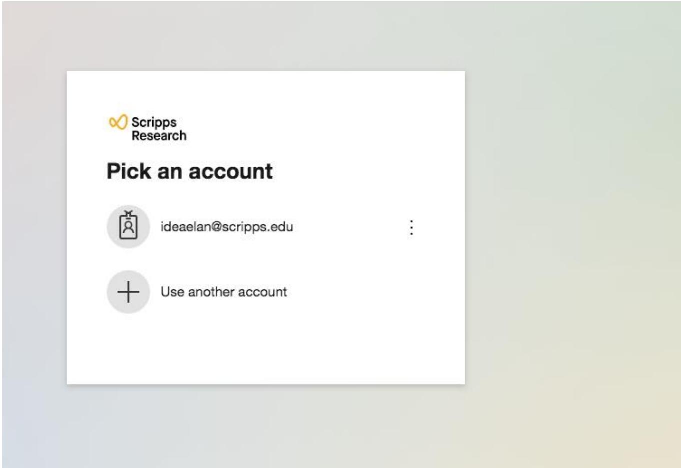
- Actual Usage Tracker:
  https://us02web.zoom.us/rec/share/rXGTpReR5vkyIVRxHrs15f4nh4rJxhjfBX9IrfKg-CDdZ7RJzyKyEwiMZthtKoLu.H_LBxYytTz9KVtwc?startTime=1602801822000

Login Instructions

Internal Users

Users with a Scripps Research login ID can use their credentials to log in and will be redirected to Infinity.

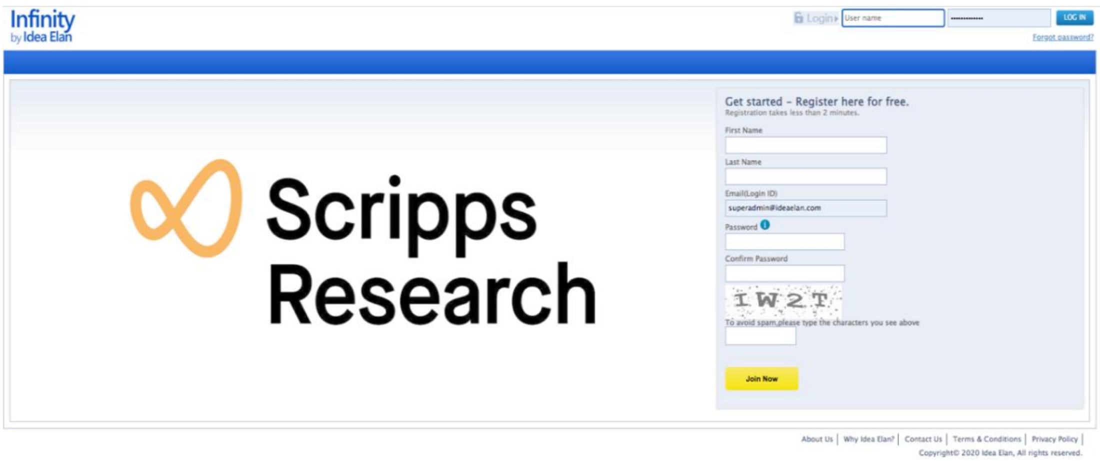
Internal User Login URL: https://secure21.ideaelan.com/secure/public/applogin.aspx



External Users

External user 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.”

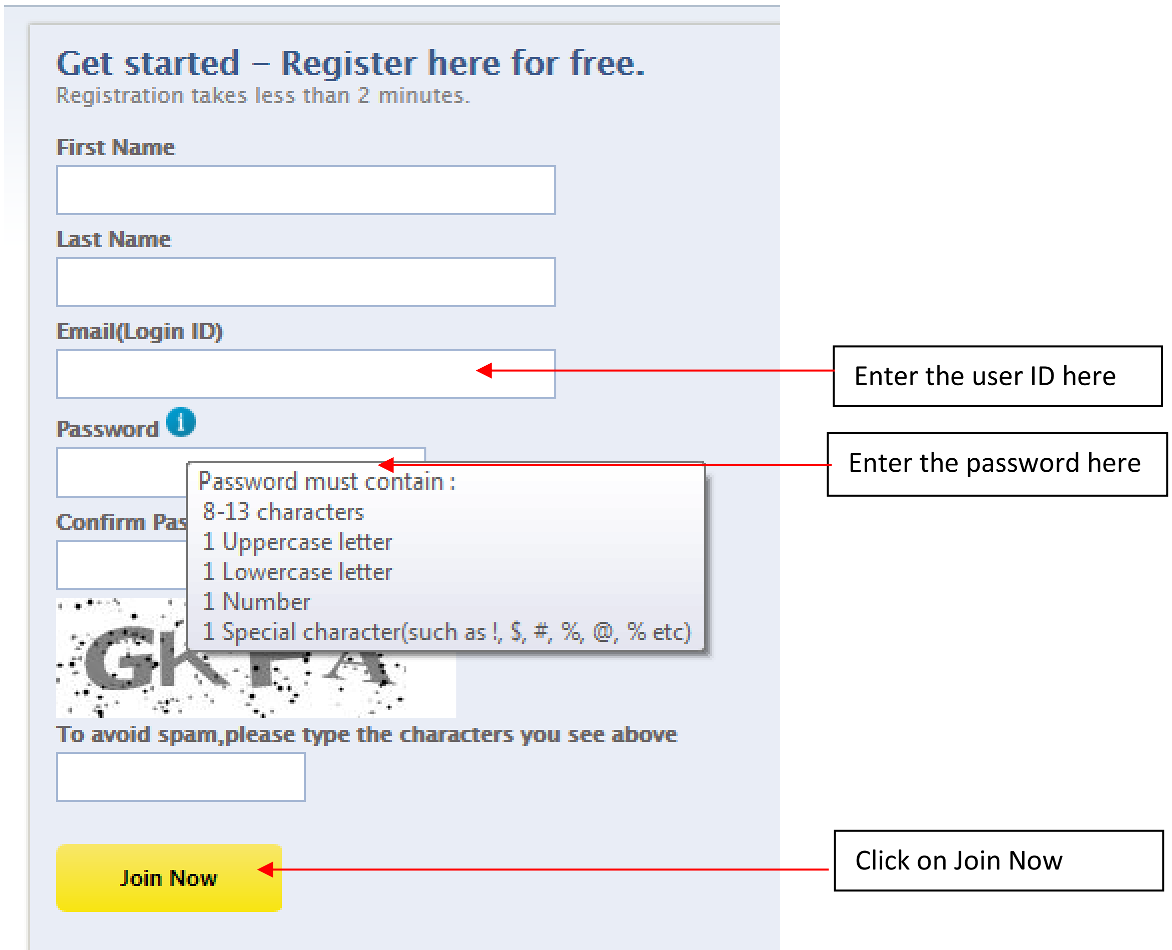
External User Login URL: https://secure21.ideaelan.com/Scripps/Public/AppLogin.aspx



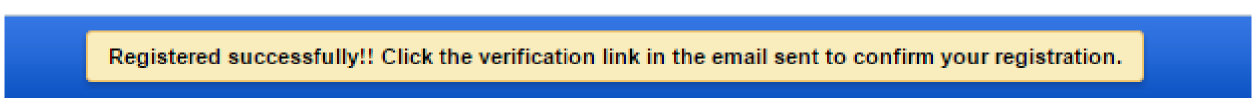
New User Sign-up (For external users only)

New External 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.



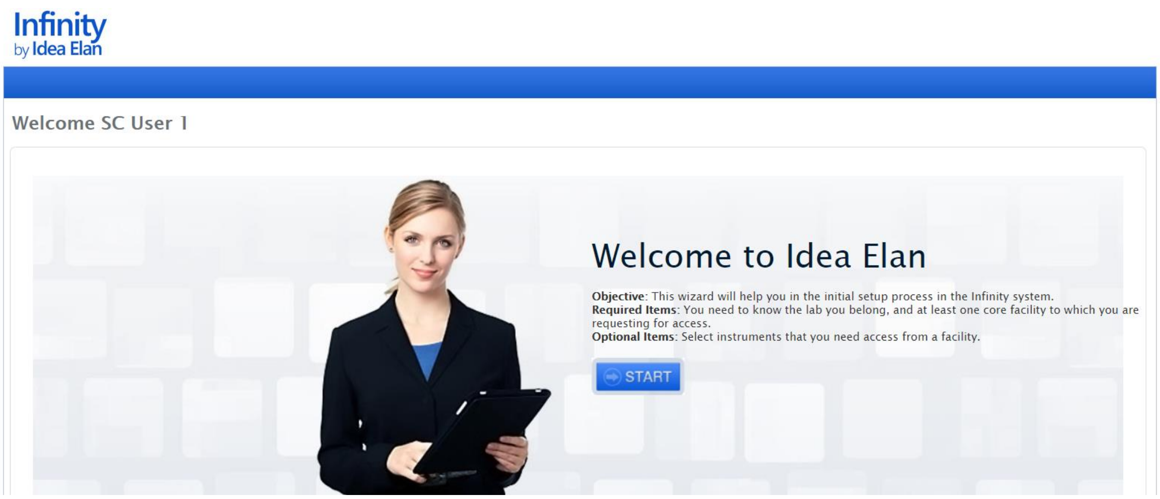
- After registering, a confirmation message will appear on the screen. Click the verification link sent to the email provided.



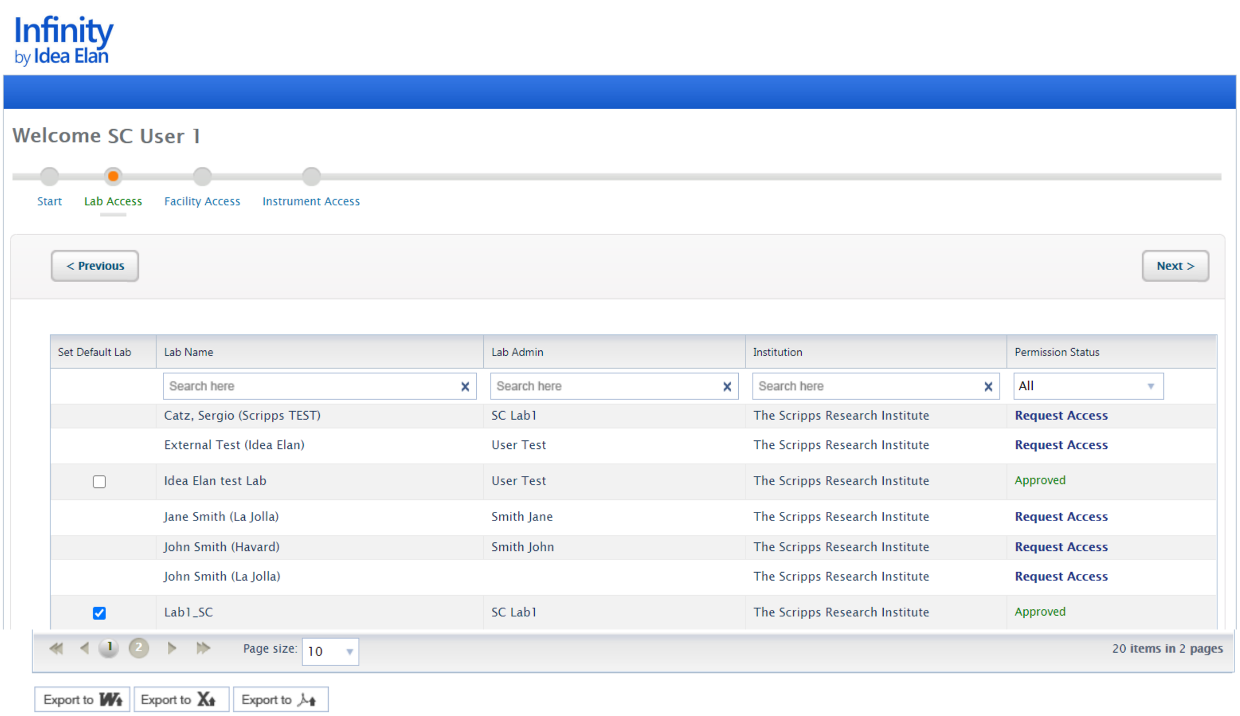
- Once the email is verified, the page will be redirected to a registration wizard.
- Click on the start button to go through the registration process.

Registration Wizard:

All new users in Infinity need to complete the registration wizard and request access to labs, facilities and instruments.

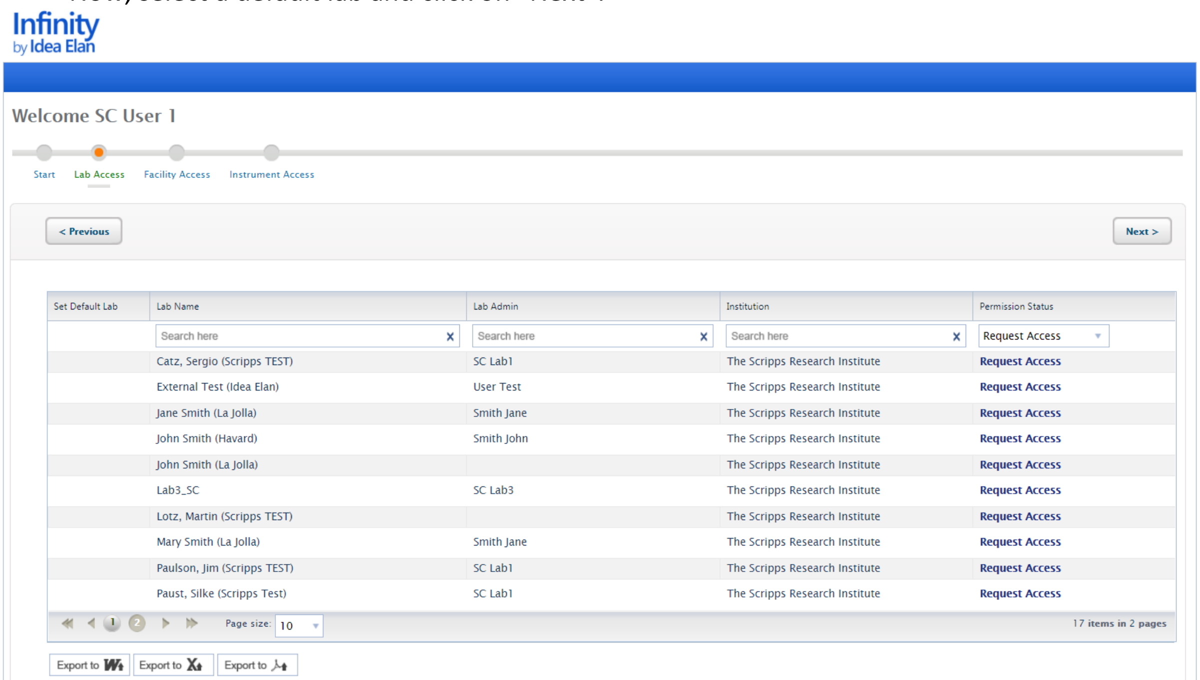


- On the next page, select access to labs by clicking on "Request Access."



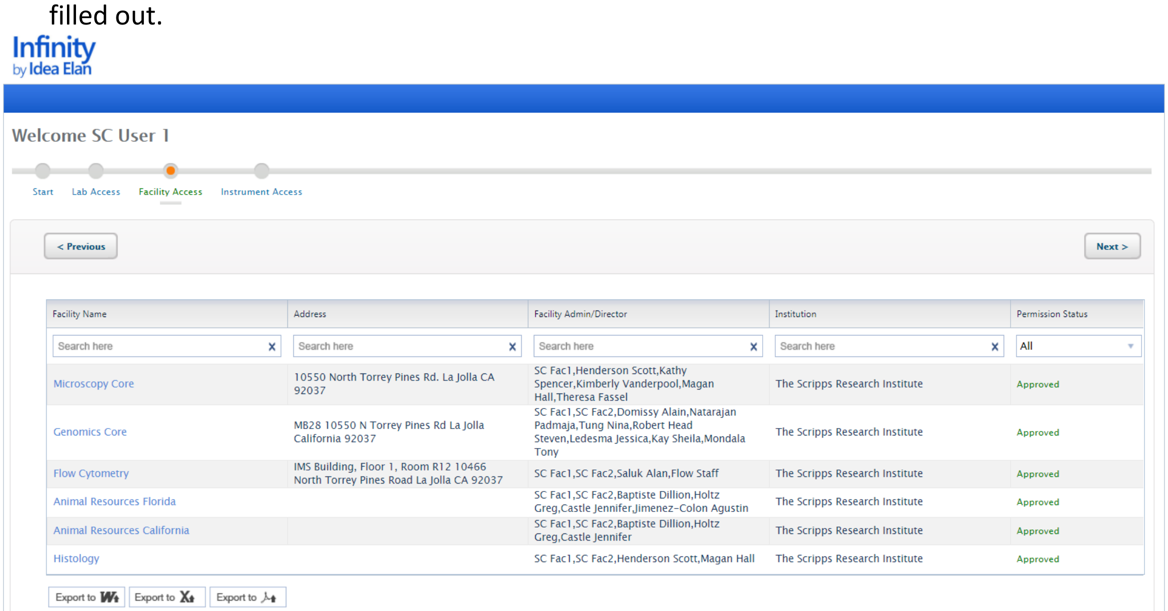
Note: most access requests need manual approval from the PI, others may be automatically approved (based on lab settings)

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



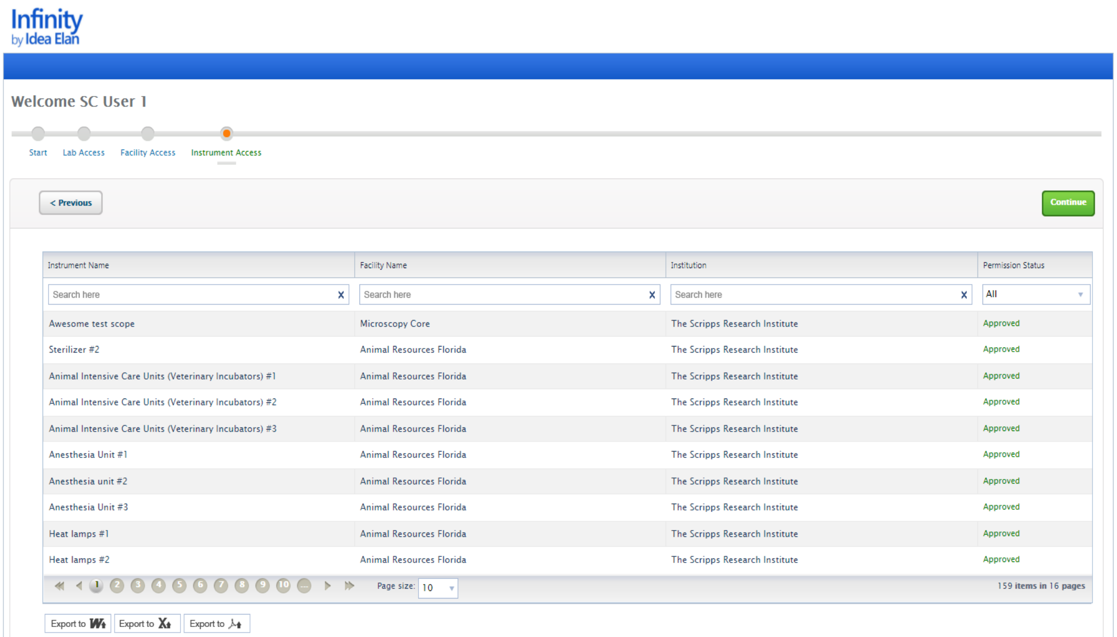
Set Default Lab	Lab Name	Lab Admin	Institution	Permission Status
	Search here	Search here	Search here	Request Access
	Catz, Sergio (Scripps TEST)	SC Lab1	The Scripps Research Institute	Request Access
	External Test (Idea Elan)	User Test	The Scripps Research Institute	Request Access
	Jane Smith (La Jolla)	Smith Jane	The Scripps Research Institute	Request Access
	John Smith (Havard)	Smith John	The Scripps Research Institute	Request Access
	John Smith (La Jolla)		The Scripps Research Institute	Request Access
	Lab3_SC	SC Lab3	The Scripps Research Institute	Request Access
	Lotz, Martin (Scripps TEST)		The Scripps Research Institute	Request Access
	Mary Smith (La Jolla)	Smith Jane	The Scripps Research Institute	Request Access
	Paulson, Jim (Scripps TEST)	SC Lab1	The Scripps Research Institute	Request Access
	Paust, Silke (Scripps Test)	SC Lab1	The Scripps Research Institute	Request Access

- On 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.

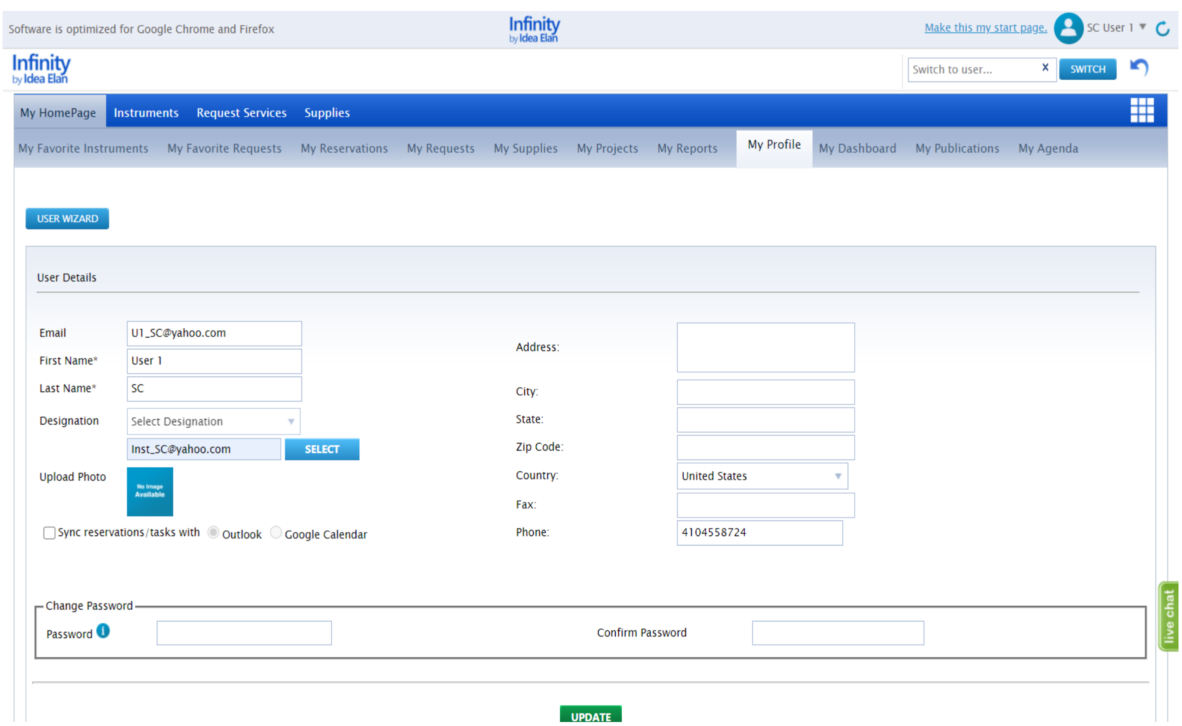


Facility Name	Address	Facility Admin/Director	Institution	Permission Status
Search here	Search here	Search here	Search here	All
Microscopy Core	10550 North Torrey Pines Rd. La Jolla CA 92037	SC Fac1,Henderson Scott,Kathy Spencer,Kimberly Vanderpool,Magan Hall,Theresa Fassel	The Scripps Research Institute	Approved
Genomics Core	MB28 10550 N Torrey Pines Rd La Jolla California 92037	SC Fac1,SC Fac2,Domissy Alain,Natarajan Padmaja,Tung Nina,Robert Head Steven,Ledesma Jessica,Kay Sheila,Mondala Tony	The Scripps Research Institute	Approved
Flow Cytometry	IMS Building, Floor 1, Room R12 10466 North Torrey Pines Road La Jolla CA 92037	SC Fac1,SC Fac2,Saluk Alan,Flow Staff	The Scripps Research Institute	Approved
Animal Resources Florida		SC Fac1,SC Fac2,Baptiste Dillion,Holtz Greg,Castle Jennifer,Jimenez-Colon Agustin	The Scripps Research Institute	Approved
Animal Resources California		SC Fac1,SC Fac2,Baptiste Dillion,Holtz Greg,Castle Jennifer	The Scripps Research Institute	Approved
Histology		SC Fac1,SC Fac2,Henderson Scott,Magan Hall	The Scripps Research Institute	Approved

- 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.



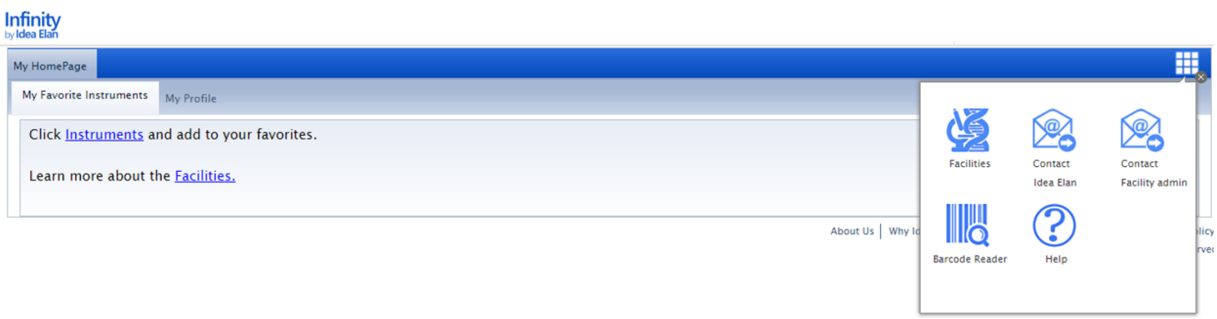
- Click on Continue to exit the wizard.
- Under My Profile, users can enter address, upload photo, sync their reservation and create AUT password



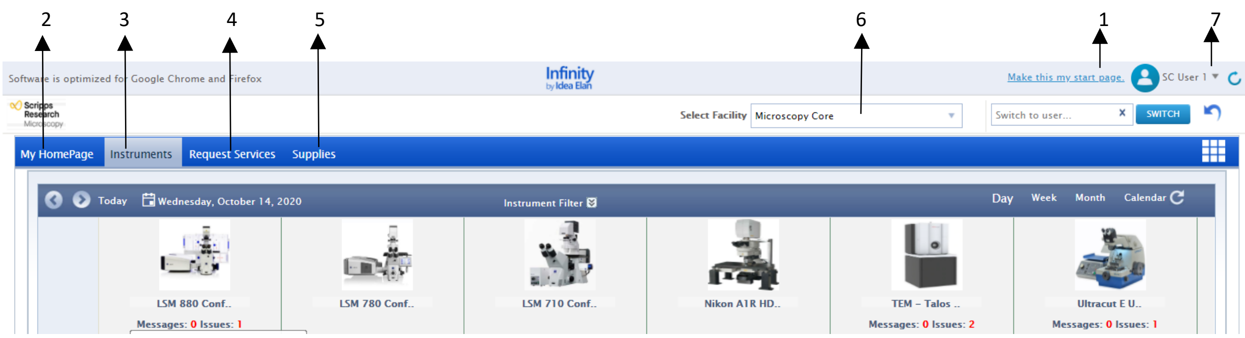
- The new user registration process is now complete.

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.

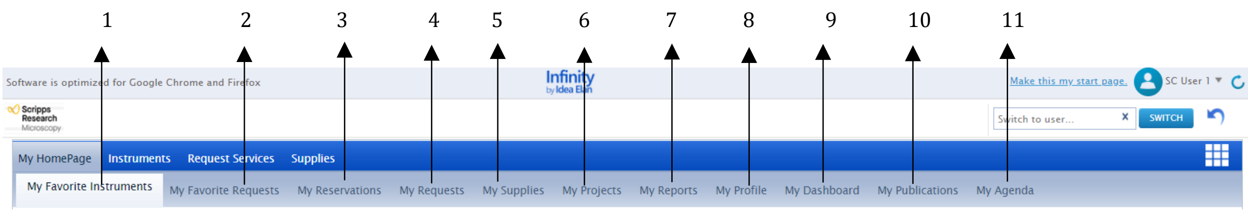


User Functions:



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/service requests, reservations, projects, reports, publications and user profile.
3. **Instruments:** view calendar with instruments/rooms in a facility and make reservations
4. **Request Services:** Submit sample forms/ service requests.
5. **Supplies:** Place orders for new supplies within the facility.
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.

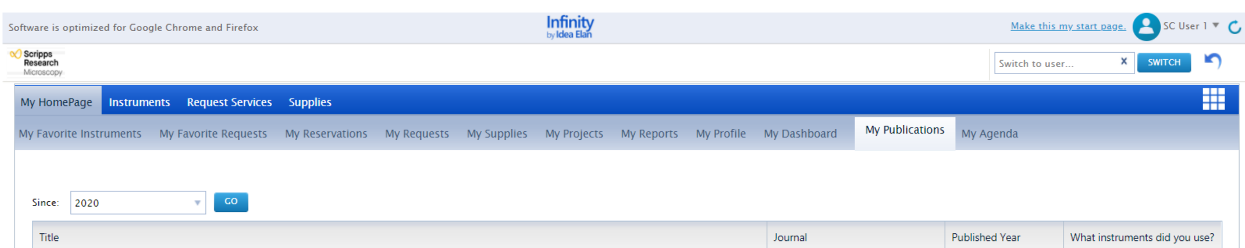
My Home Page:



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 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:** PubMed 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:

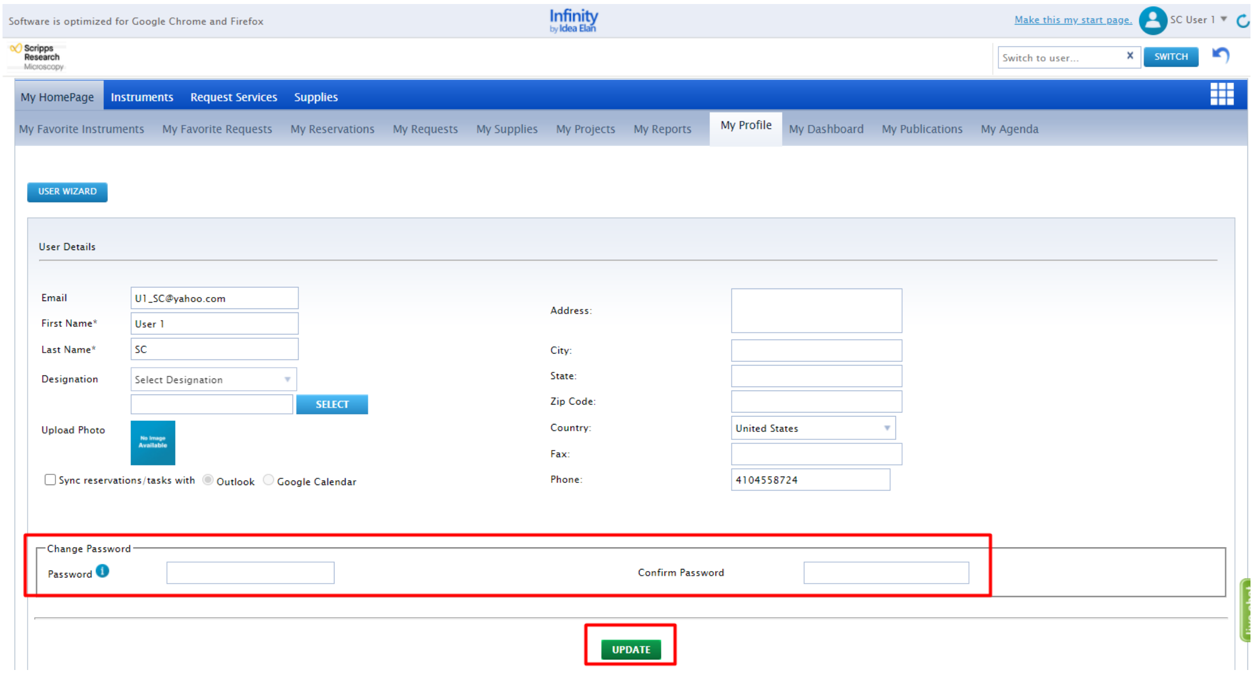
Users can keep track of their publications using Idea Elan. The feature allows for users to sort through and view their previous works. Also, facility admins have the ability to request that users' publications be present under their facility to accreditate the core. Users have the option to select yes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



AUT Password

If your facility is using an Actual Usage Tracker to record the login and logoff time on the instrument, you will need to set your password.

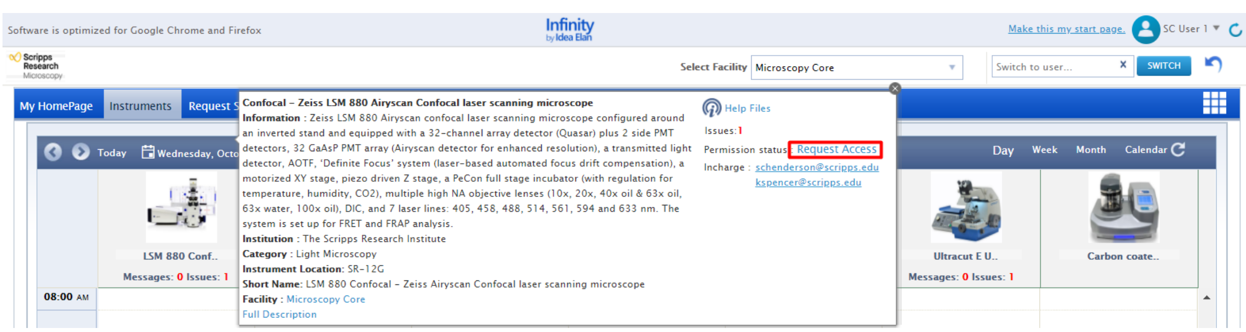
- You can set or change your password under 'My Profile'



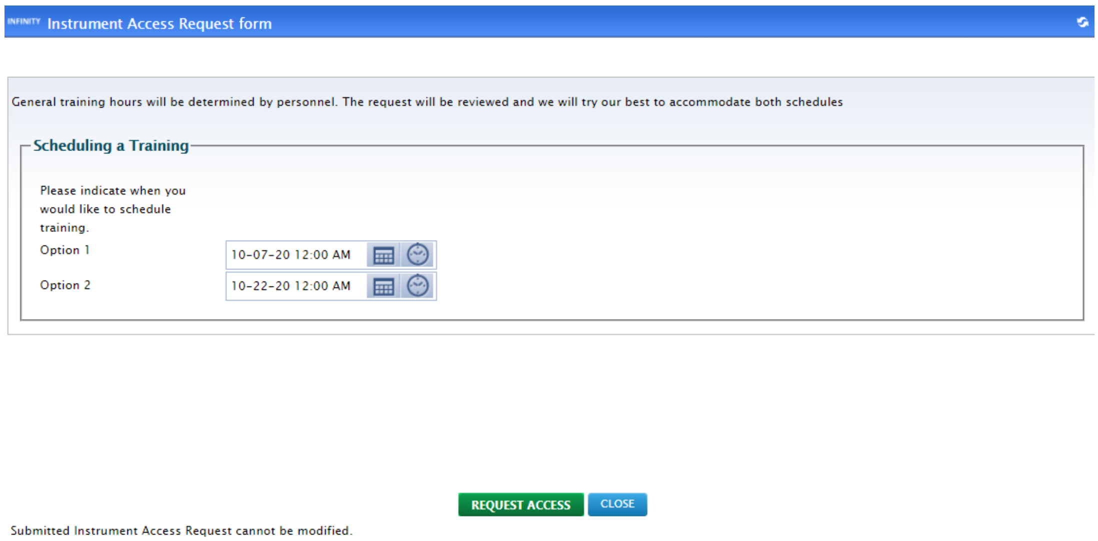
Instruments:

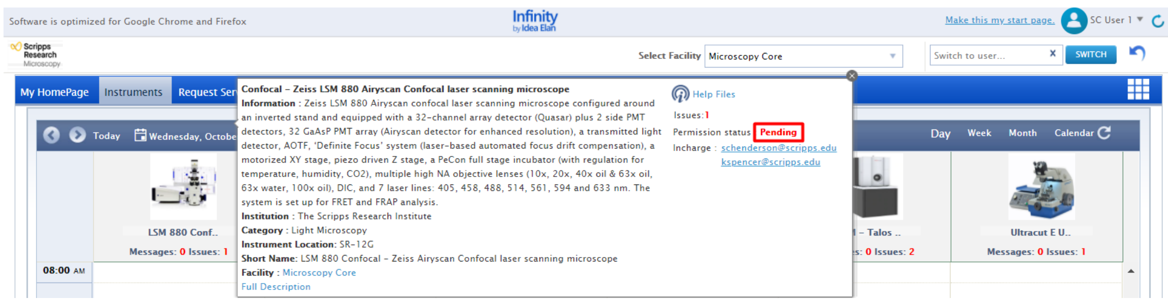
How to access instruments:

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

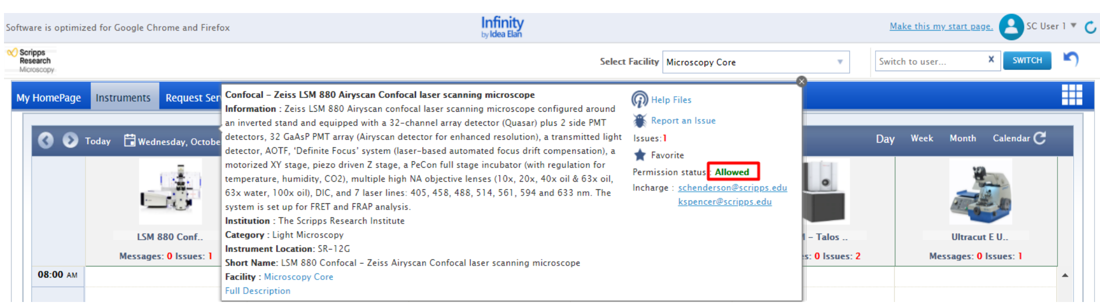


- The user will need to complete the instrument access request form. Once completed, approval will be given by the facility admin.



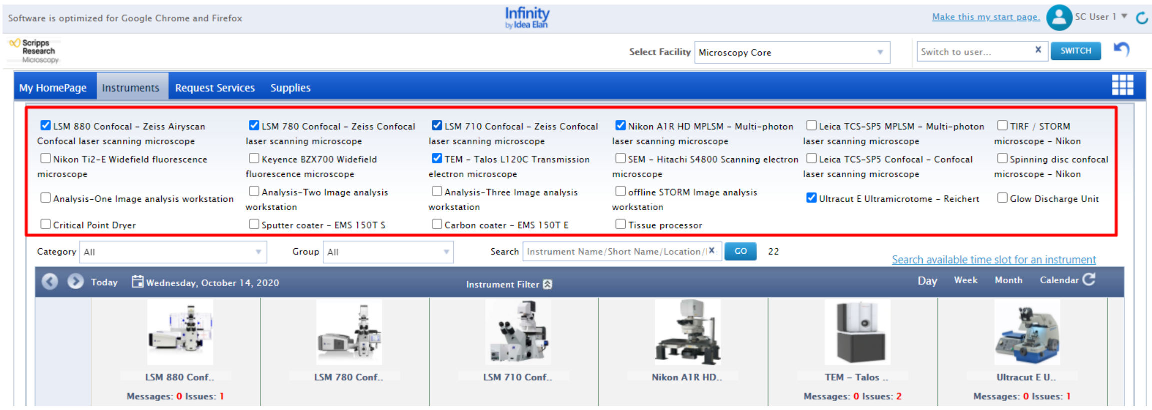


- If the settings are set as auto-approve by the admin, then the request will be automatically approved. The user will then be able to make reservations.
- <u>Note:</u> In many cases, a training session will be scheduled by the facility admin. Only after a completed training session does the user have access to unsupervised sessions.

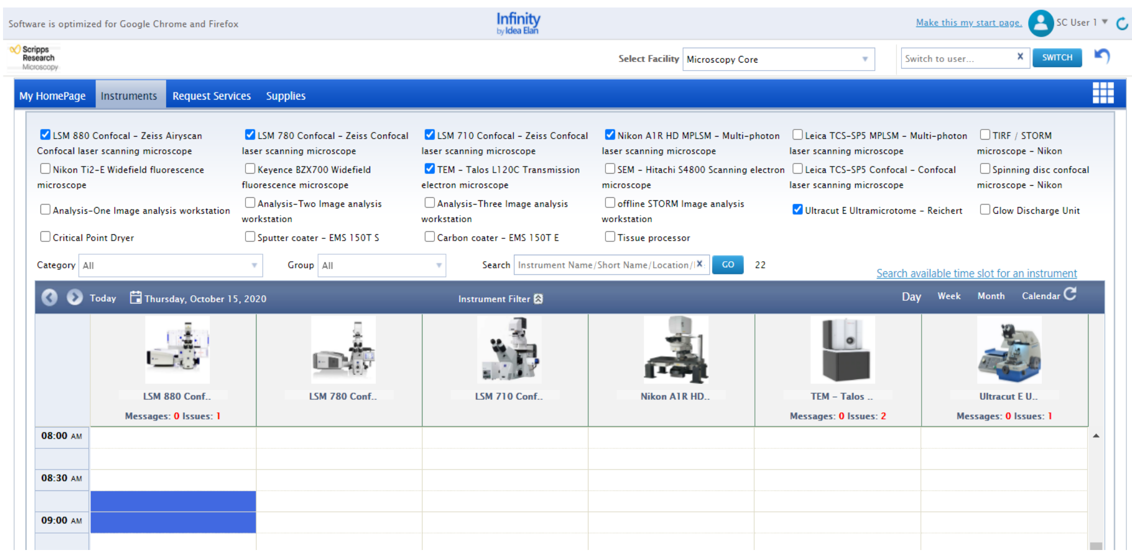


How to make a reservation:

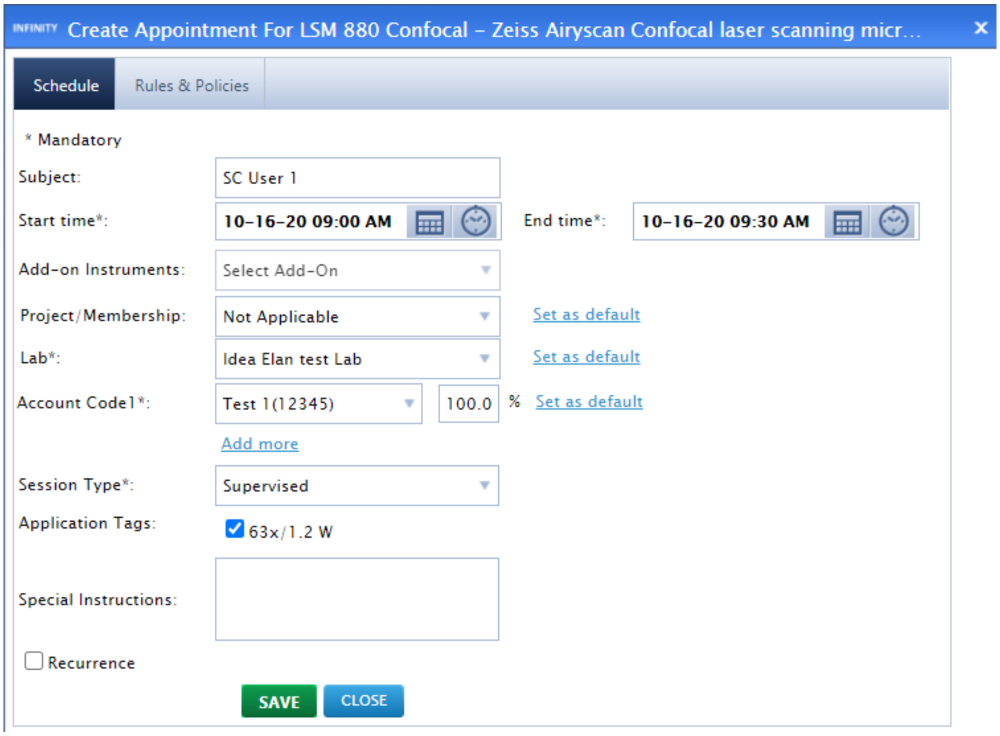
- Click on Instruments tab to view the calendar for instrument reservation.
- The User can filter instruments using filter options.
- Calendar can be seen in day/week/month view based on the selection.



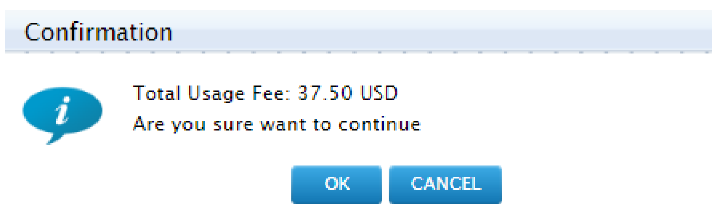
- Select an instrument, drag on the calendar to create a reservation.



- Select your lab, account code/PO number and the session type
- If you have additional comments, enter those in the special instruction box



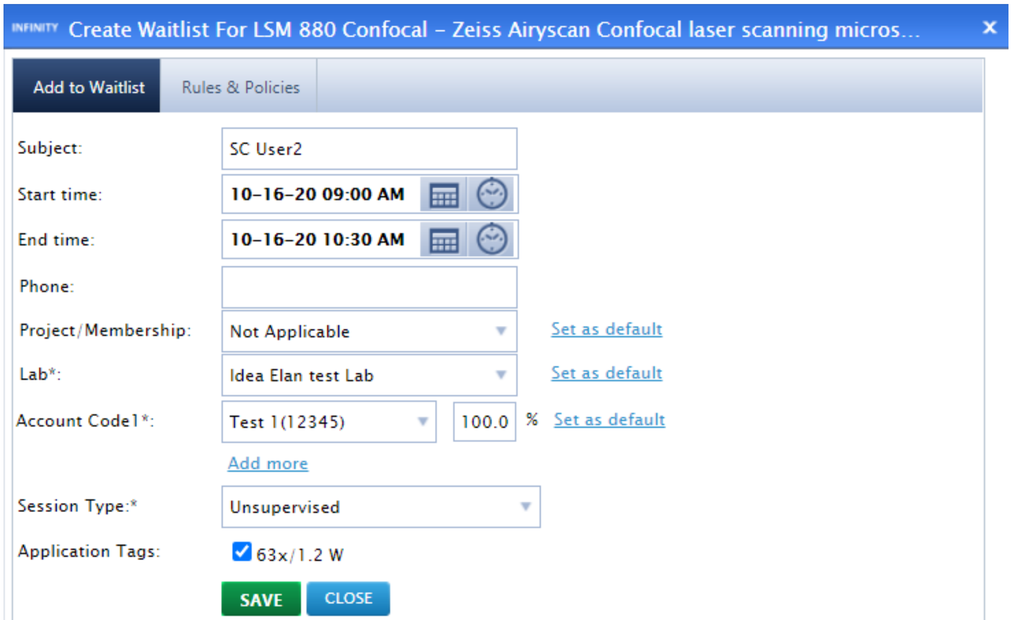
- Confirm the usage fee and click on OK.



- A reservation will be created.

How to make a wait-list appointment:

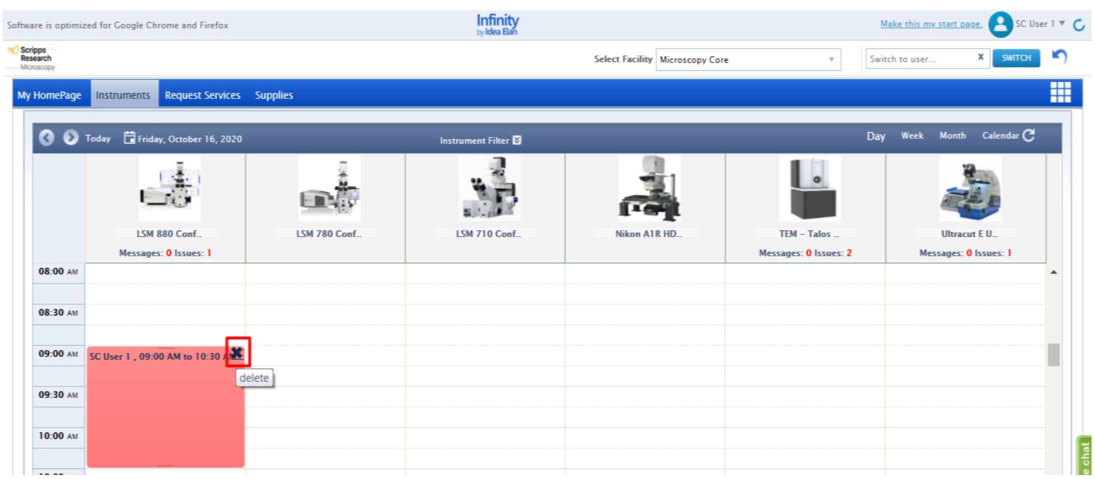
- When User A has created an appointment and User B wants to have the same slot for the same instrument, then User B creates a wait list appointment by clicking on the appointment created by User A. Then click on SAVE.



- A wait list appointment will be created.

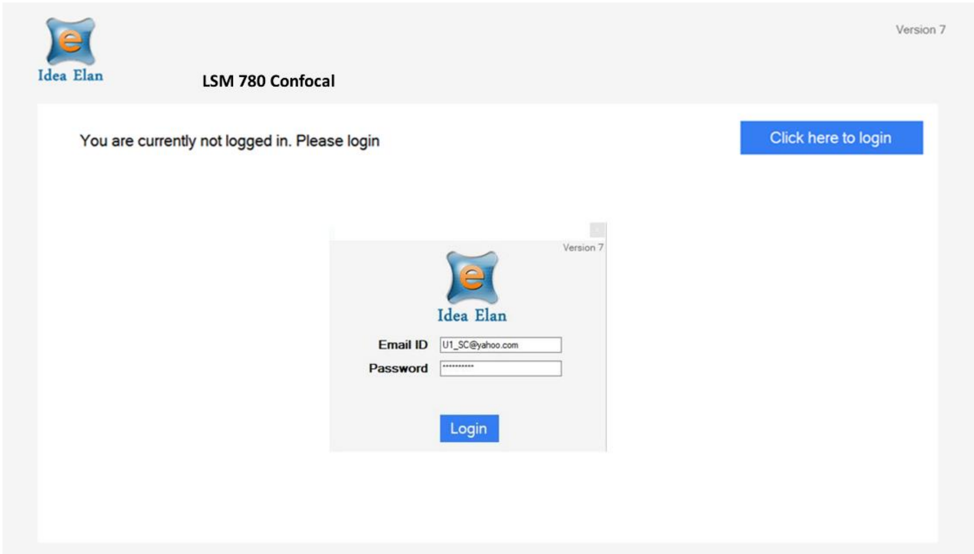
How to delete a reservation:

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

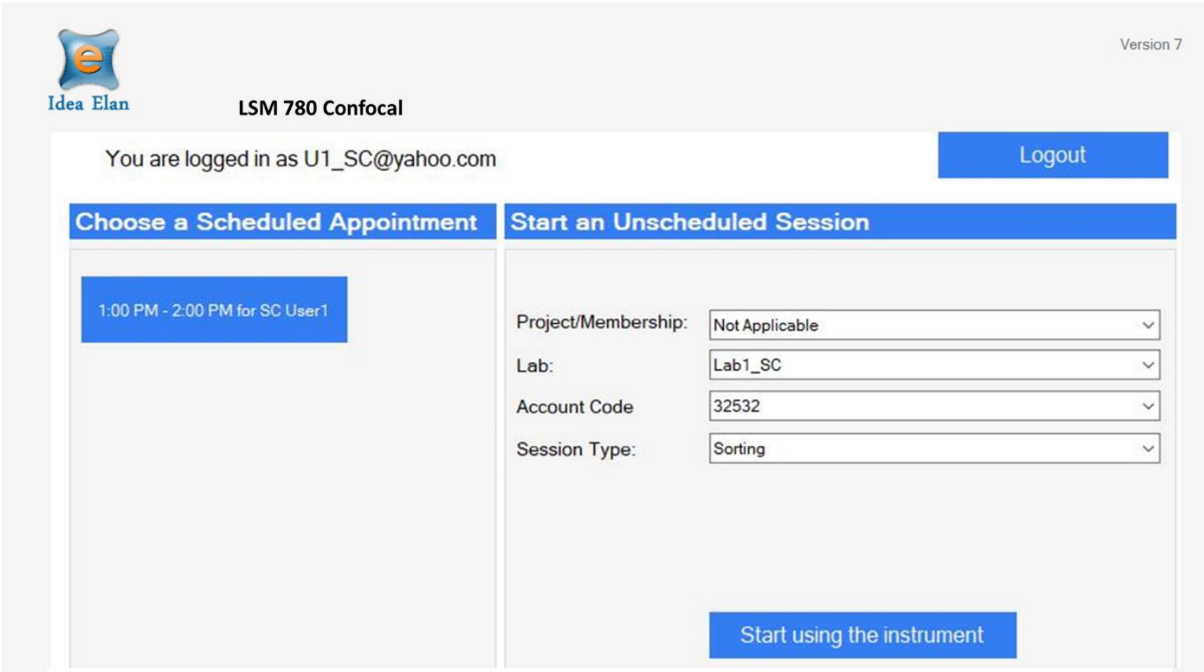


How to start the Actual Usage Tracker (AUT)

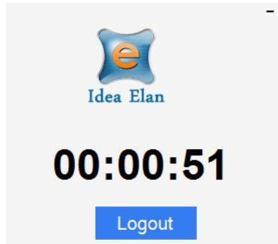
- AUT will be in full screen mode on the instruments computer. Users have to enter their full email and password.



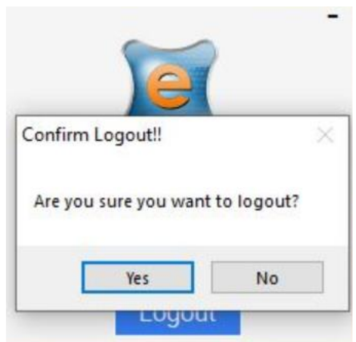
- Users have the option to select a scheduled appointment or begin an unscheduled session.



- After choosing the selection, click confirm start usage. Click OK and the AUT will start running.



- Once the reservation has come to an end, click Logout to stop AUT. You will be prompted to confirm Logout.

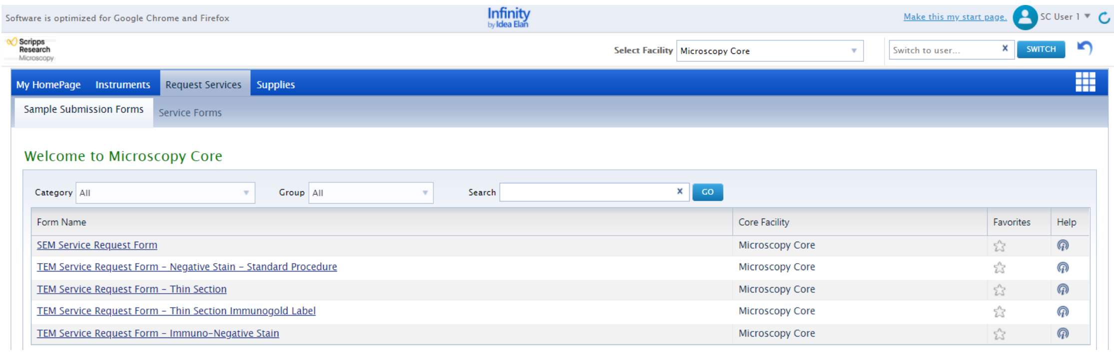


- Click Yes to end the session.

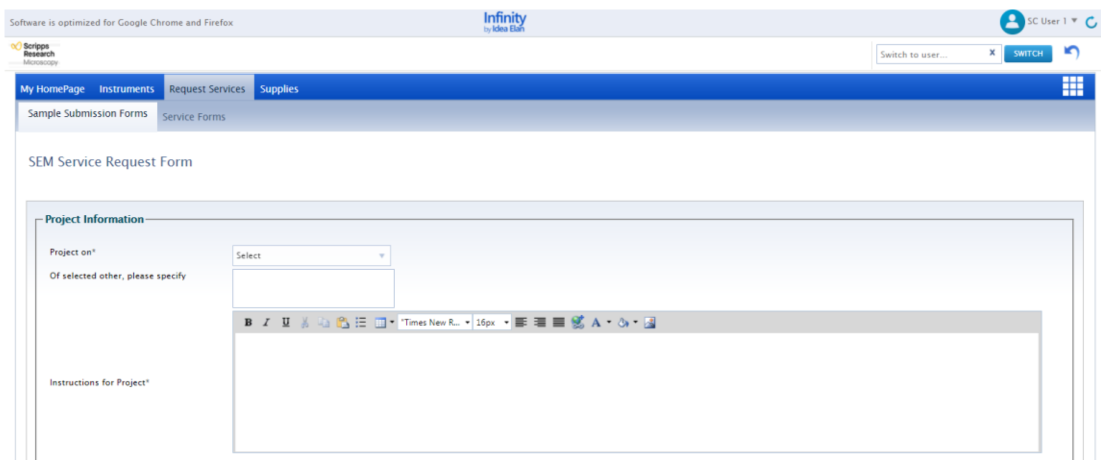
Request Services

How to fill out and submit a request form

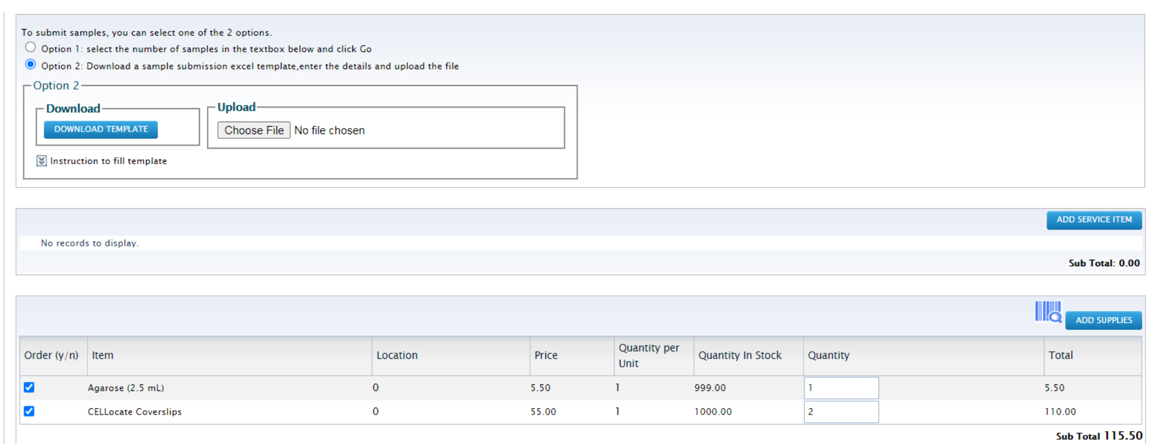
- Sample submission/service request forms are provided for each facility under the “Request Services” tab. Forms can be favorited for quicker access.
- All the Help files uploaded by the admin while creating the sample submission form can be seen beside the favorite star icon.
- If the User faces any issue while using the sample submission form, he/she can directly report using the Report Issue icon beside the Help icon.

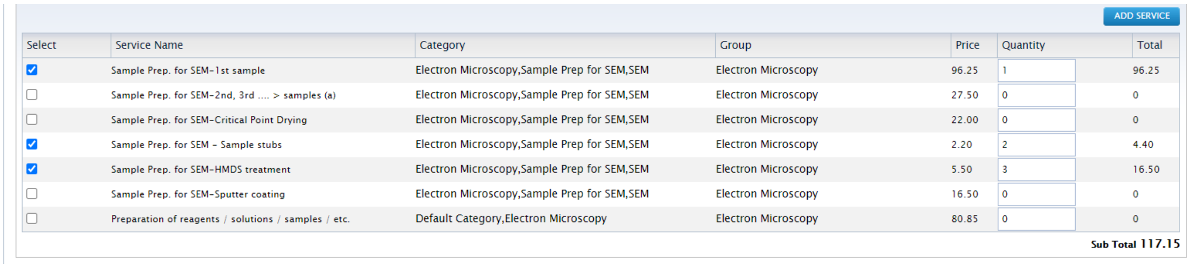


- To submit a request, click on the form name. Fill in the necessary details pertaining to the samples or services requested.



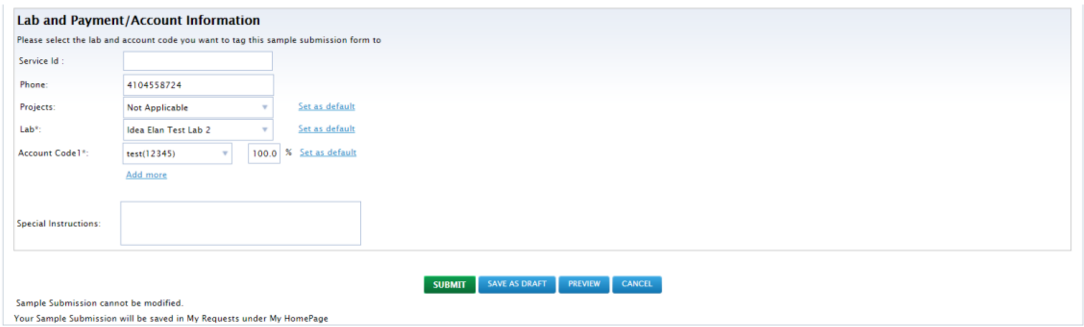
- Some forms may have multiple sections and fields, which will expand depending on the answers selected



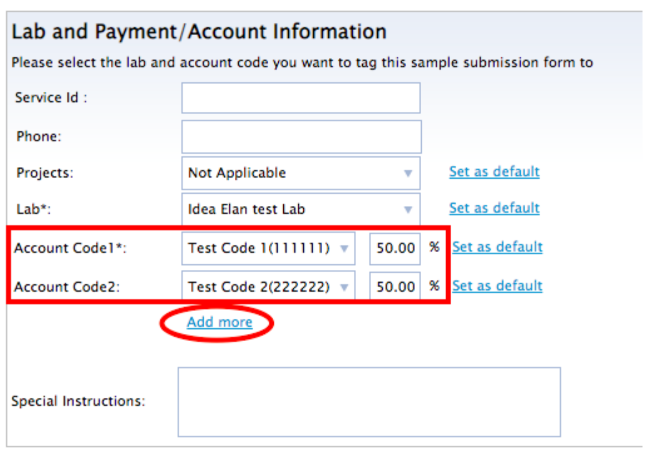


Select	Service Name	Category	Group	Price	Quantity	Total
☑	Sample Prep. for SEM-1st sample	Electron Microscopy,Sample Prep for SEM,SEM	Electron Microscopy	96.25	1	96.25
☐	Sample Prep. for SEM-2nd, 3rd .... > samples (a)	Electron Microscopy,Sample Prep for SEM,SEM	Electron Microscopy	27.50	0	0
☐	Sample Prep. for SEM-Critical Point Drying	Electron Microscopy,Sample Prep for SEM,SEM	Electron Microscopy	22.00	0	0
☑	Sample Prep. for SEM - Sample stubs	Electron Microscopy,Sample Prep for SEM,SEM	Electron Microscopy	2.20	2	4.40
☑	Sample Prep. for SEM-HMDS treatment	Electron Microscopy,Sample Prep for SEM,SEM	Electron Microscopy	5.50	3	16.50
☐	Sample Prep. for SEM-Sputter coating	Electron Microscopy,Sample Prep for SEM,SEM	Electron Microscopy	16.50	0	0
☐	Preparation of reagents / solutions / samples / etc.	Default Category,Electron Microscopy	Electron Microscopy	80.85	0	0

- Once all information has been provided, the last section at the bottom of the form is "Lab and Payment/Account Information"
- Users have the ability to name their request in the "Service ID" field.
- Provide PI name under Lab field and index number to be used

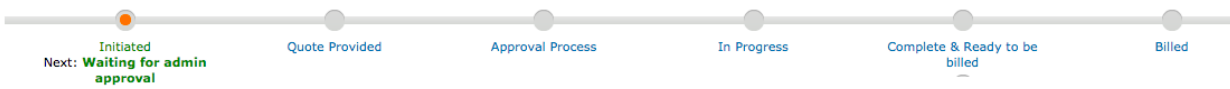


- Select the account code you wish to use. Splitting account codes can be available as well, so split charges to multiple codes. Click "add more" to select additional codes and enter the split percentage.



- <u>Note:</u> The account code/PO will not be charged until the form is complete and an invoice has been generated an approved.
- Once the form is ready, click on "Submit". The form cannot be modified once submitted (only admins can modify).

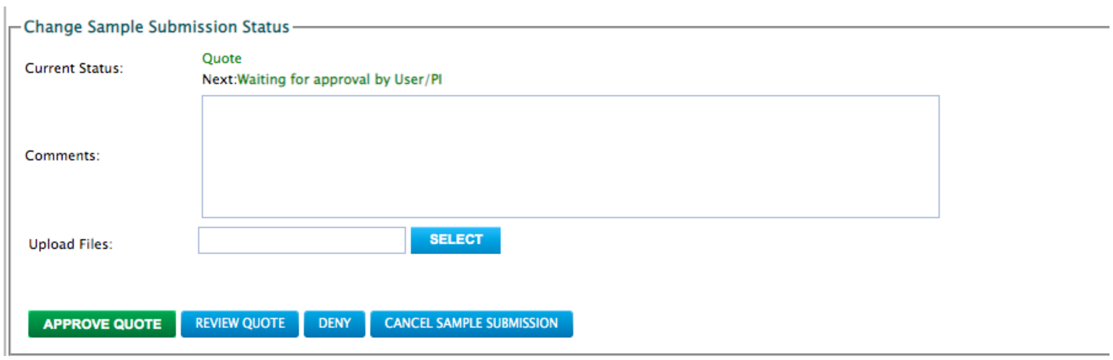
Request Form Status:



- 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

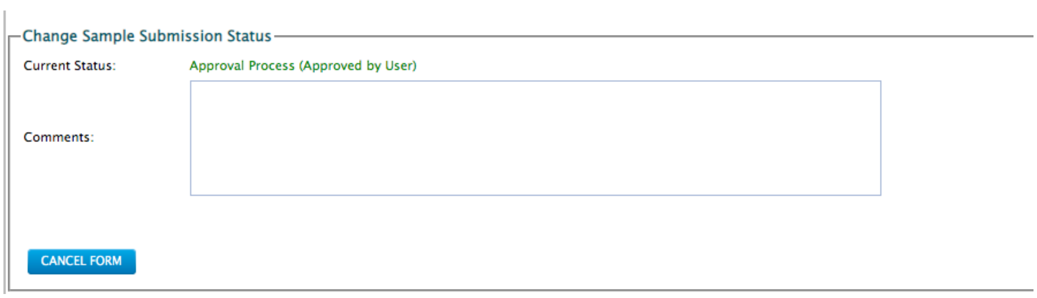
Quote approval:

- 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.



Cancel a Request Form:

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

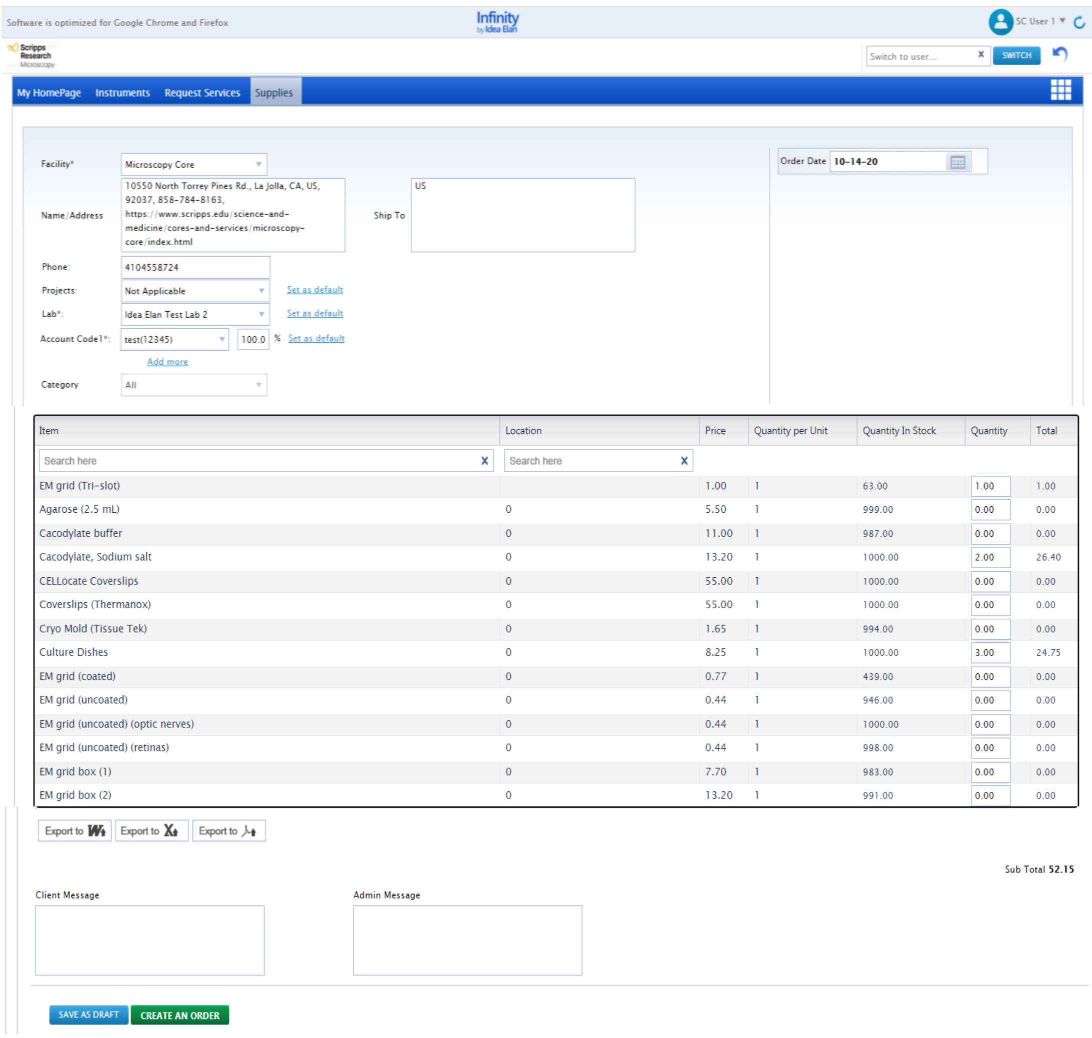


Supplies

How to submit a supply order:

<u>Note:</u> Supplies may only be available in selected facilities.

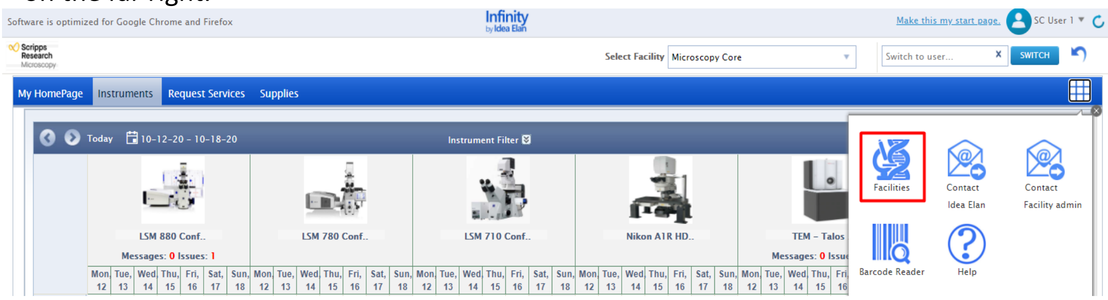
- Some facilities provide supplies that are essential for the instrument or analysis.
- Clicking on the “Supplies” tab on the user toolbar redirects to the page that displays the facility and the products available. Click on “Order Supplies” to order the supplies.



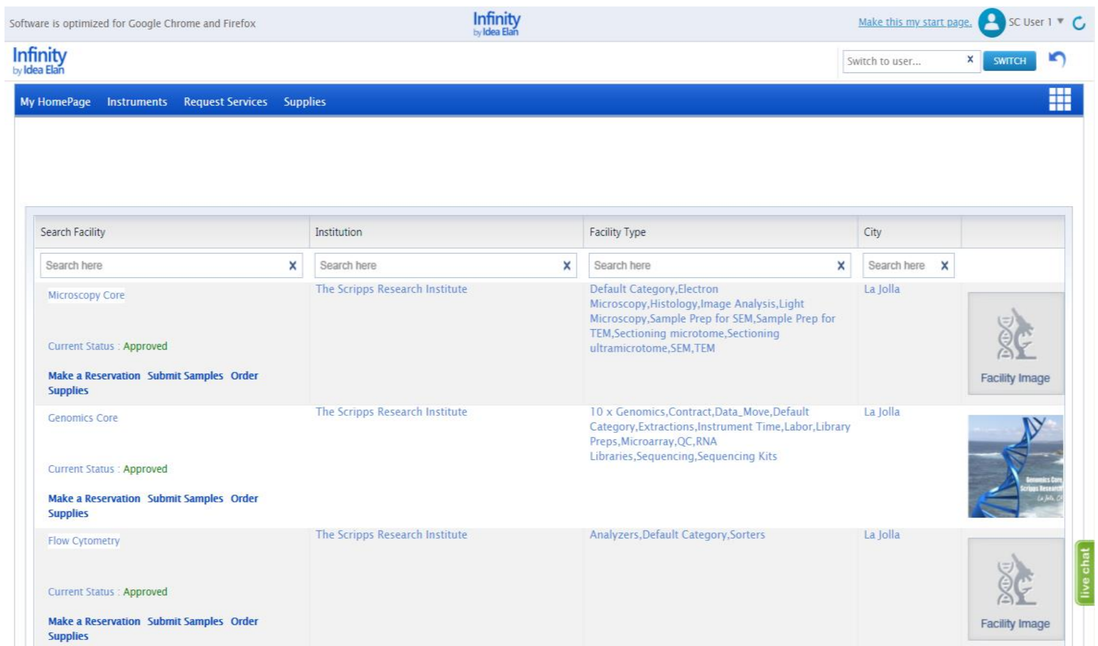
- Select the specific products by clicking on the check box near the item name. Then specify the quantity and click on “Create an Order”.
- The lab name and code need to be added while ordering supplies, or a default lab and Account Code can be set for a user.

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.