



Idea Elan 2022

INFINITY

Comprehensive Online Solution for Lab and Core Facility Management

User Guide

13800 Coppermine Rd, Herndon, VA 20171

Phone: 1-800-506-5905

Email: support@IdeaElan.com



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Quick Startup Guide

Login Instructions

URL: https://secure17.ideaelan.com/uOttawa/Public/

Go to the following URL and follow the way you would like to <authenticate>.



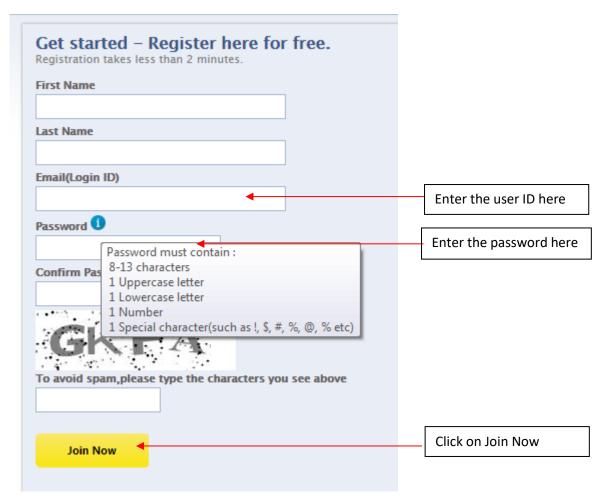




New User Sign-up (For external users only)

New External Users can register on the login page of the Infinity link.

 Enter First Name, Last Name, Email ID, Password and click on the Join Now Button



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

Registered successfully!! Click the verification link in the email sent to confirm your registration.

- 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.



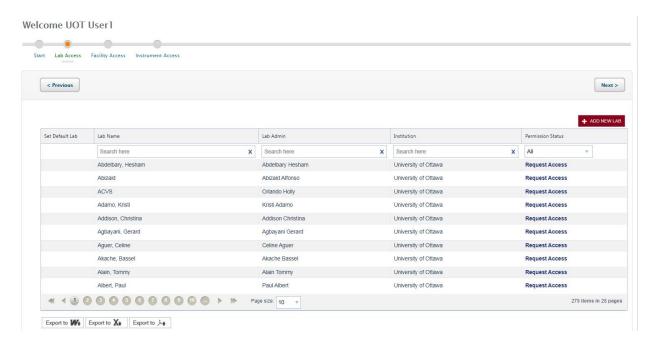
Registration Wizard:

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

Infinity by Idea Elan



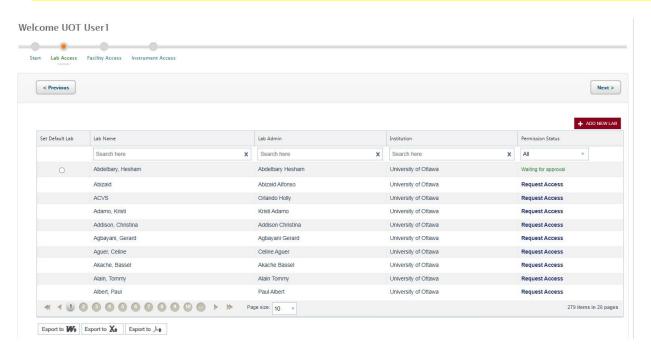
• Upon clicking start, the next page asks you to select access to labs by clicking on "Request Access."



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

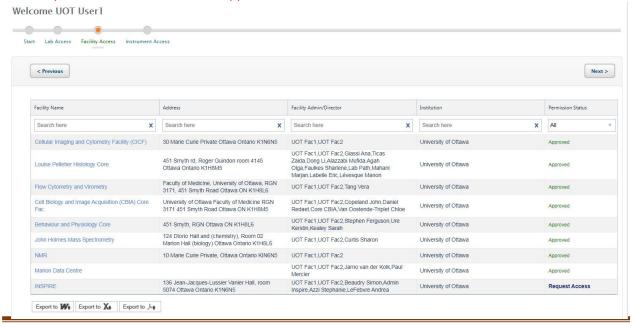


- Now, select a default lab and click on "Next".
- Enter and select the Lab Name for the PI of your lab or Add New Lab if your PI's name does not appear.



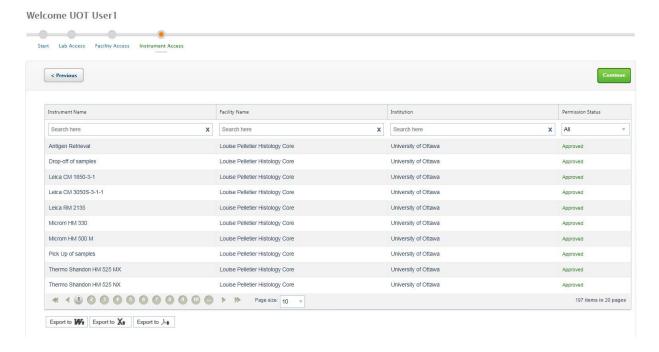
- In the next page, select access to facilities.
- Select StemCore Laboratories.

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 completed and reviewed before approval.



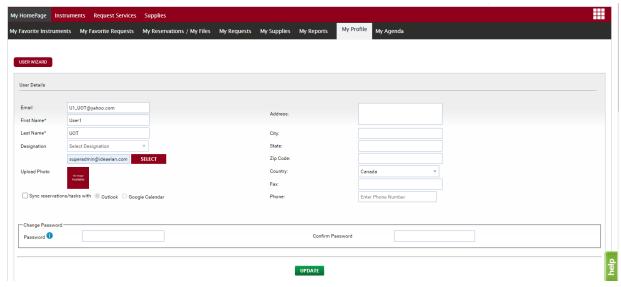


• Next request access to applicable instruments within a facility. This can be done by clicking on "Request Access" on the right of each instrument. Instrument access request forms may also be applicable.





- 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.

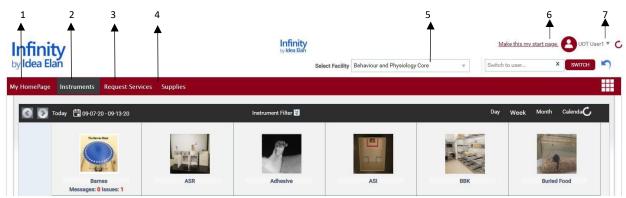


The User:

- 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.



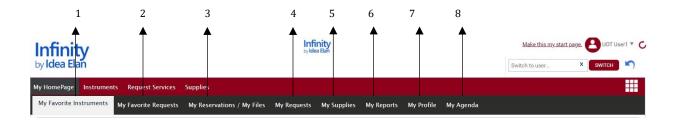
User Functions:



- 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:

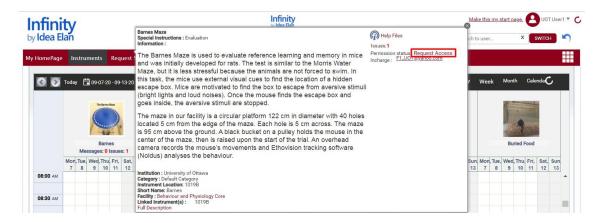


- 1. **My Favorite Instruments:** Displays Instruments set as favorite with a calendar to aid in making quick reservations.
- 2. **My Favorite Requests:** Displays all sample submission forms and service requests set as favorite by the user.
- 3. **My Reservations:** To view the instrument reservations 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

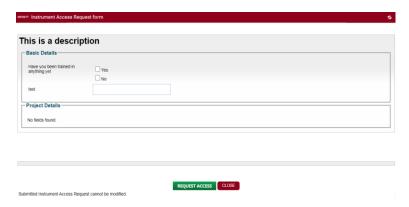
How to access instruments:

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

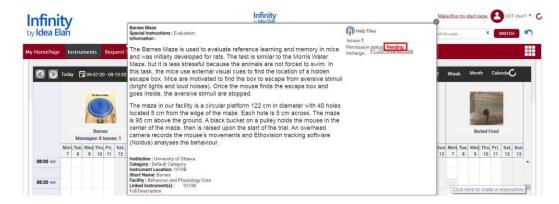




• The user will need to complete the instrument access request form. Once completed, approval will be given by the facility admin.



The permission status will then change to Pending.



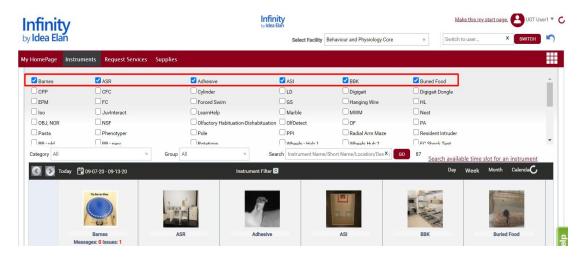
• If the settings are set as auto-approve by the admin, then the request will be automatically approved. The user will then be able to make reservations.



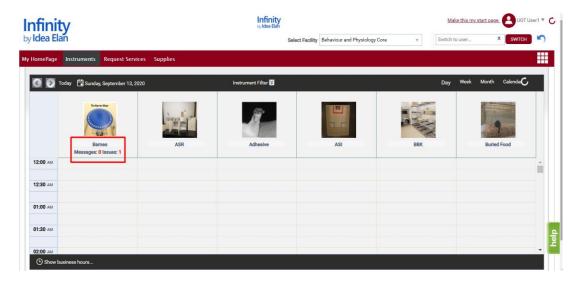


How to make a reservation:

- 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.

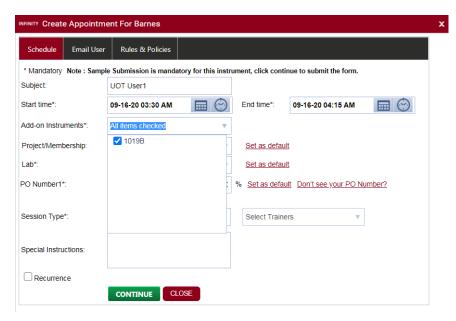


- Select an instrument; drag on the calendar to create a reservation.
- Add-on instruments/test and Add-on rooms. Users can not be in the same room at the same time.
- When creating a reservation, users will first select their test on the calendar (ex. Barnes Maze).





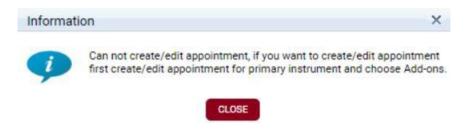
• In the reservation window, users must select the add-on instrument (room, ex. 1019B). If the room is already reserved at that time by another user, they will not be able to complete the reservation and will need to select a different time or room.



• Confirm the usage fee and click on OK.



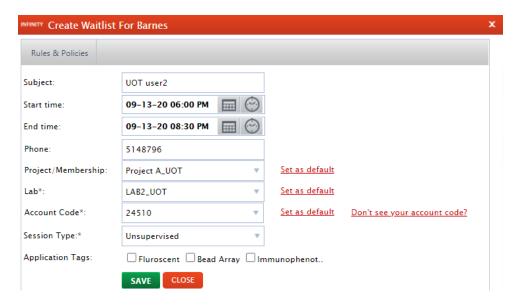
- A reservation will be created.
- Users are not able to book the rooms directly on the room calendar. Users must book the test
 first and the rooms as add-ons. If a user tries to book a room directly, they will receive the below
 error message.





How to make a wait-list appointment:

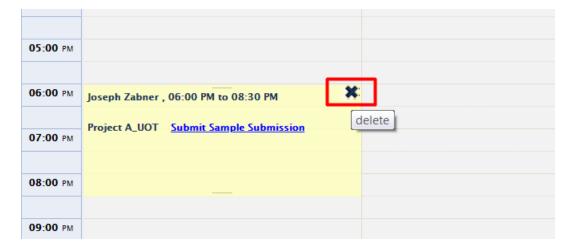
• When User A has created an appointment and User B wants to have the same slot for the same instrument, then User B creates a wait list appointment by clicking on the appointment created by User A. Then click on SAVE.



• 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

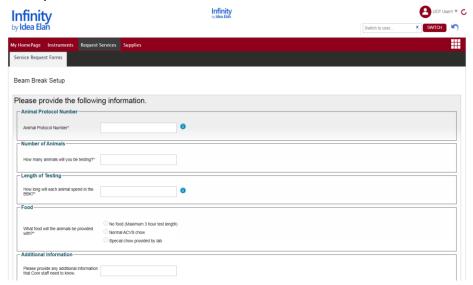
How to fill out and submit a request form

(For information regarding filling the form for Sanger DNA Sequencing service, click here)

- 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.

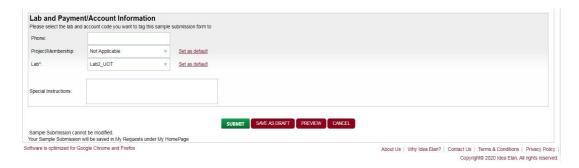


• To submit a sample form, click on the form name. Fill in the necessary details pertaining to the samples.



- 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, and select Lab. This can be set to default for labs most often used.





• 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.



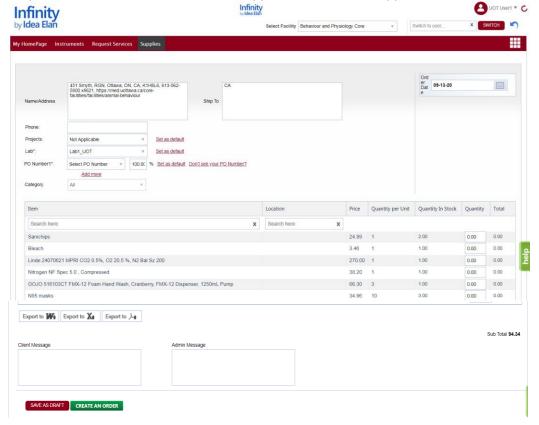


Supplies

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.

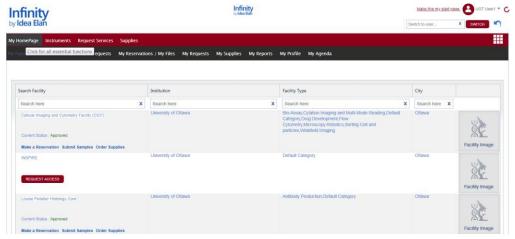


Access other Facilities

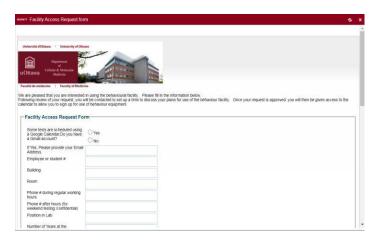
• To request access to other facilities, hover over the 9 square box and click on the blue DNA icon on the far right.



• 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.

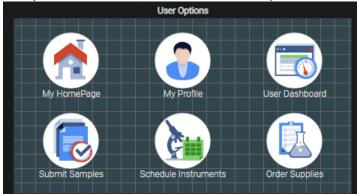


• If the facility settings are set as auto-approve, then the request will be automatically approved.

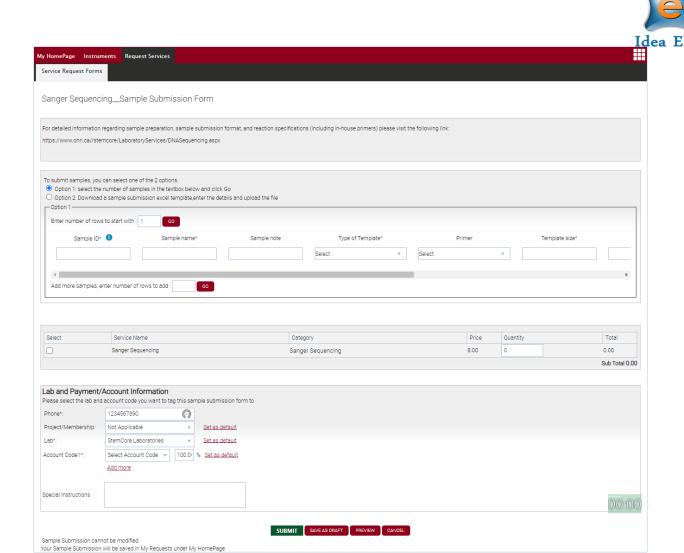


Filling the sample submission form for Sanger Sequencing service at StemCore Laboratories

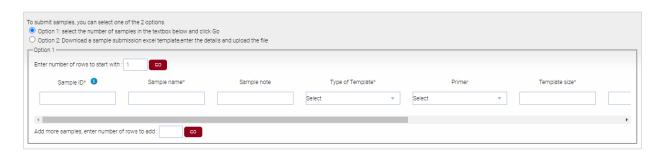
- On your home screen, choose "Submit Samples".



- Choose the "Sanger Sequencing_Sample Submission Form" from the list to go to the Service Request Forms page.



- There are two options for filling the form: online and by uploading a filled-in form.



Important notes regarding filling the sample form:

Software is optimized for Google Chrome and Firefox

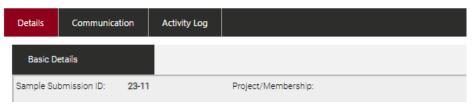
- 1. The entries that are marked with * are mandatory in both options.
- 2. For assigning "Sample ID" to your samples:

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- a. Start with "1" and proceed incrementally.
- b. When you submit your form, the system will take you to a page where a unique "Sample Submission ID" is displayed under "Basic Details" heading.



- c. For labeling each sample tube, use your "Sample Submission ID" as a prefix and add the relevant sample ID after it. For example, if your request ID is 23-11, tube labels would be 23-11-1, 23-11-2, 22-11-3, and so on.
- 3. If you decide to download the template and fill out the form offline, follow the instructions below to avoid encountering errors when uploading:
 - DO NOT change the sheet name "Template".
 - DO NOT change the Template column names.
 - For "Type of Template", choose only from the following options:
 - o PCR Product
 - o Plasmid
 - Cosmid/Lambda Phage
 - o BAC, Genomic DNA
 - For "Primer", choose only from the following options:
 - **CUSTOM**
 - o M13 Forward
 - o M13 Reverse
 - o SP6
 - o T3
 - o T7 Promoter
 - o T7 Terminator
 - o PGK Promoter
 - o EGFP-N
 - o EGFP-C
 - CMV Forward
 - o BGH Reverse
 - o SV40
 - o (-21) M13F
 - o pFastBac Fwd
 - o pFastBac Rev
 - For "GC Rich or Secondary Structure?", choose only YES or NO.
- After filling in/uploading the form, tick the "Select" box, then enter the number of samples.





- Fill "Lab and Payment/Account Information" with the required information.
- Click the "SUBMIT" button.

Filling the sample submission form for Fragment Analyzer and Qubit services at StemCore Laboratories

- Log into Infinity with your username and password.
- On the Homepage, click on the "Submit Samples" icon; or in the User Dashboard, choose "Request Services" tab.
- Click on the Fragment Analyzer/ Qubit Sample Submission Form _which takes you to the form.
- Assign sample ID for your samples: start from 1 to how many samples you are submitting,

The system will give you a final "Sample Submission ID" which you could mention as reference to your request later.

-Fill up the form as much as you can, if you have more than one sample add the numbers in the box (picture below) and get more rows to enter your additional samples

	I .
^ -l -l	
-Add more samples, enter number of rows to add:	

- If you have a large number of samples to submit, you can download a sample submission excel template, enter the details and upload the file
- Asterisks are mandatory to fill up.
- Choose the services you would like by checking the boxes on the left of each service item.
- Fill in your information, account number and any specific instructions for your samples.

Filling the sample submission form for Single cell Profiling service at StemCore Laboratories

- Log into Infinity with your username and password.
- On your home screen, choose "Request Services" tab.
- Click on Single Cell Sample Submission Form which takes you to the form.
- Assign sample ID for your samples: start from 1 to how many samples you are submitting,

The system will give you a final "Sample Submission ID" which you could mention as reference to your request later.

- Fill up the form as much as you can, if you have more than one sample add the numbers in the box (picture below) and get more rows to enter your additional samples
- Add more samples, enter number of rows to add:
- Fields with asterisks are mandatory.
- choose services you would like to be done.
- Fill in your information, account number and any specific instructions for your samples.
- Submit your form and you will receive emails regarding the status or your request 😊



Filling the sample submission form for NGS services at StemCore Laboratories

- Log into Infinity with your username and password.
- On the Homepage, click on the "Submit Samples" icon; or in the User Dashboard, choose "Request Services" tab.
- Click on the NGS Sample Submission Form which takes you to the form.
- In "Project Summary, write a short title for your project
- Assign sample ID for your samples: start from 1 to how many samples you are submitting, the system will give you a final "Sample Submission ID" which you could mention as reference to your request later.
- Fill up the form as much as you can, if you have more than one sample add the numbers in the box (picture below) and get more rows to enter your additional samples

-Add more samples.	enter number of rows to add:	

- If you have a large number of samples to submit, you can download a sample submission excel template, enter the details and upload the file
- Fields with asterisks are mandatory.
- Choose the services you would like by checking the boxes on the left of each service item.
- Fill in your information, account number and any specific instructions for your samples.
- Submit your form and you will receive emails regarding the status or your request.