



Idea Elan



uOttawa

Idea Elan

2021

INFINITY

Comprehensive Online Solution for Lab
and Core Facility Management

User Guide

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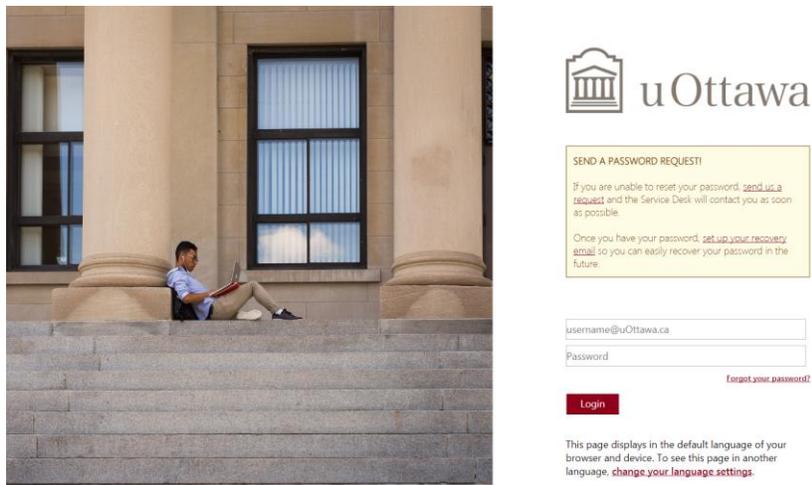
Quick Startup Guide

Login Instructions

Internal Users

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

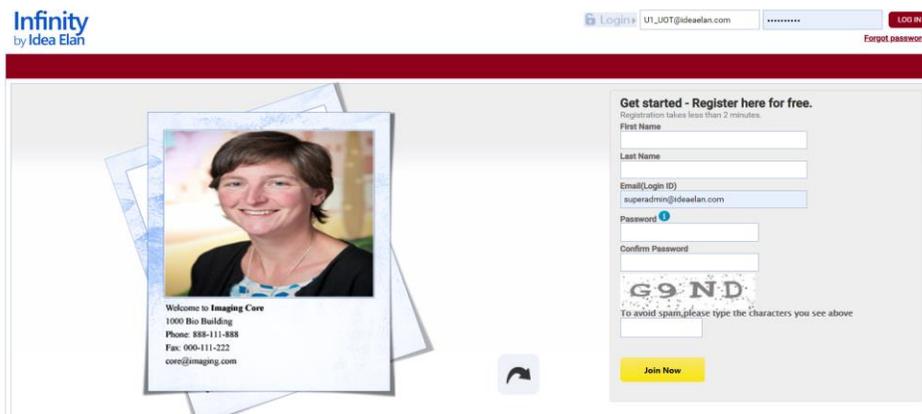
Internal User Login URL: <https://secure17.ideaelan.com/secure/Public/AppLogin.aspx>



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.ideaelan.com/uOttawa_Test/Public/AppLogin.aspx



Welcome UOT User1

Start **Lab Access** Facility Access Instrument Access

< Previous Next >

[+ ADD NEW LAB](#)

Set Default Lab	Lab Name	Lab Admin	Institution	Permission Status
	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="All"/>
	Abdelbary, Hesham	Abdelbary Hesham	University of Ottawa	Request Access
	Abizaid	Abizaid Alfonso	University of Ottawa	Request Access
	ACVS	Orlando Holly	University of Ottawa	Request Access
	Adamo, Kristi	Kristi Adamo	University of Ottawa	Request Access
	Addison, Christina	Addison Christina	University of Ottawa	Request Access
	Agbayani, Gerard	Agbayani Gerard	University of Ottawa	Request Access
	Aguer, Celine	Celine Aguer	University of Ottawa	Request Access
	Akache, Bassel	Akache Bassel	University of Ottawa	Request Access
	Alain, Tommy	Alain Tommy	University of Ottawa	Request Access
	Albert, Paul	Paul Albert	University of Ottawa	Request Access

Page size: 10 279 items in 28 pages

Export to Export to Export to

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”.

Welcome UOT User1

Start **Lab Access** Facility Access Instrument Access

< Previous Next >

[+ ADD NEW LAB](#)

Set Default Lab	Lab Name	Lab Admin	Institution	Permission Status
	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="All"/>
<input type="radio"/>	Abdelbary, Hesham	Abdelbary Hesham	University of Ottawa	Waiting for approval
	Abizaid	Abizaid Alfonso	University of Ottawa	Request Access
	ACVS	Orlando Holly	University of Ottawa	Request Access
	Adamo, Kristi	Kristi Adamo	University of Ottawa	Request Access
	Addison, Christina	Addison Christina	University of Ottawa	Request Access
	Agbayani, Gerard	Agbayani Gerard	University of Ottawa	Request Access
	Aguer, Celine	Celine Aguer	University of Ottawa	Request Access
	Akache, Bassel	Akache Bassel	University of Ottawa	Request Access
	Alain, Tommy	Alain Tommy	University of Ottawa	Request Access
	Albert, Paul	Paul Albert	University of Ottawa	Request Access

Page size: 10 279 items in 28 pages

Export to Export to Export to

- 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.

Welcome UOT User1

Start Lab Access **Facility Access** Instrument Access

< Previous
Next >

Facility Name	Address	Facility Admin/Director	Institution	Permission Status
Cellular Imaging and Cytometry Facility (CICF)	30 Marie Curie Private Ottawa Ontario K1N6N5	UOT Fac1,UOT Fac2	University of Ottawa	Approved
Louise Pelletier Histology Core	451 Smyth rd, Roger Guindon room 4145 Ottawa Ontario K1H8M5	UOT Fac1,UOT Fac2,Giassi Ana,Ticas Zaida,Dong Li,Alazzabi Mufida,Agah Olga,Faulkes Sharlene,Lab Path,Mahani Marjan,Labelle Eric, Lévesque Manon	University of Ottawa	Approved
Flow Cytometry and Virometry	Faculty of Medicine, University of Ottawa, RGN 3171, 451 Smyth Road Ottawa ON K1H8L6	UOT Fac1,UOT Fac2,Tang Vera	University of Ottawa	Approved
Cell Biology and Image Acquisition (CBIA) Core Fac	University of Ottawa Faculty of Medicine RGN 3171 451 Smyth Road Ottawa ON K1H8M5	UOT Fac1,UOT Fac2,Copeland John,Daniel Redaet,Core CBIA, Van Oostende-Triplet Chloe	University of Ottawa	Approved
Behaviour and Physiology Core	451 Smyth, RGN Ottawa ON K1H8L6	UOT Fac1,UOT Fac2,Stephen Ferguson,Ure Kerstin,Kealey Sarah	University of Ottawa	Approved
John Holmes Mass Spectrometry	124 Dlorio Hall and (chemistry), Room 02 Marion Hall (biology) Ottawa Ontario K1H8L6	UOT Fac1,UOT Fac2,Curtis Sharon	University of Ottawa	Approved
NMR	10 Marie Curie Private, Ottawa Ontario K1N6N5	UOT Fac1,UOT Fac2	University of Ottawa	Approved
Marion Data Centre		UOT Fac1,UOT Fac2,Jarno van der Kolk,Paul Mercier	University of Ottawa	Approved
INSPIRE	136 Jean-Jacques-Lussier Vanier Hall, room 5074 Ottawa Ontario K1N6N5	UOT Fac1,UOT Fac2,Beaudry Simon,Admin Inspire,Azzi Stephanie,LeFebvre Andrea	University of Ottawa	Request Access

Export to

- 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.

Welcome UOT User1

Start Lab Access Facility Access **Instrument Access**

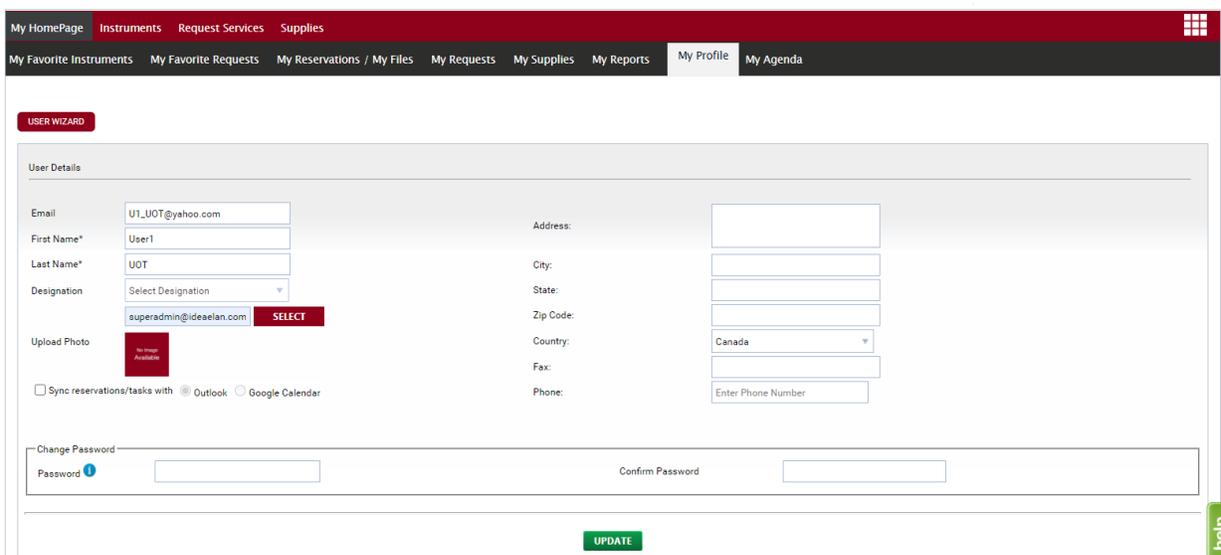
< Previous
Continue

Instrument Name	Facility Name	Institution	Permission Status
Antigen Retrieval	Louise Pelletier Histology Core	University of Ottawa	Approved
Drop-off of samples	Louise Pelletier Histology Core	University of Ottawa	Approved
Leica CM 1850-3-1	Louise Pelletier Histology Core	University of Ottawa	Approved
Leica CM 3050S-3-1-1	Louise Pelletier Histology Core	University of Ottawa	Approved
Leica RM 2135	Louise Pelletier Histology Core	University of Ottawa	Approved
Microm HM 330	Louise Pelletier Histology Core	University of Ottawa	Approved
Microm HM 500 M	Louise Pelletier Histology Core	University of Ottawa	Approved
Pick Up of samples	Louise Pelletier Histology Core	University of Ottawa	Approved
Thermo Shandon HM 525 MX	Louise Pelletier Histology Core	University of Ottawa	Approved
Thermo Shandon HM 525 NX	Louise Pelletier Histology Core	University of Ottawa	Approved

Page size: 10 197 items in 20 pages

Export to

- 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 screenshot shows the 'USER WIZARD' registration form. At the top, there is a navigation bar with links: My HomePage, Instruments, Request Services, Supplies, My Favorite Instruments, My Favorite Requests, My Reservations / My Files, My Requests, My Supplies, My Reports, My Profile, and My Agenda. The 'My Profile' link is active. Below the navigation bar, the form is titled 'USER WIZARD' and contains a 'User Details' section. The form fields are as follows:

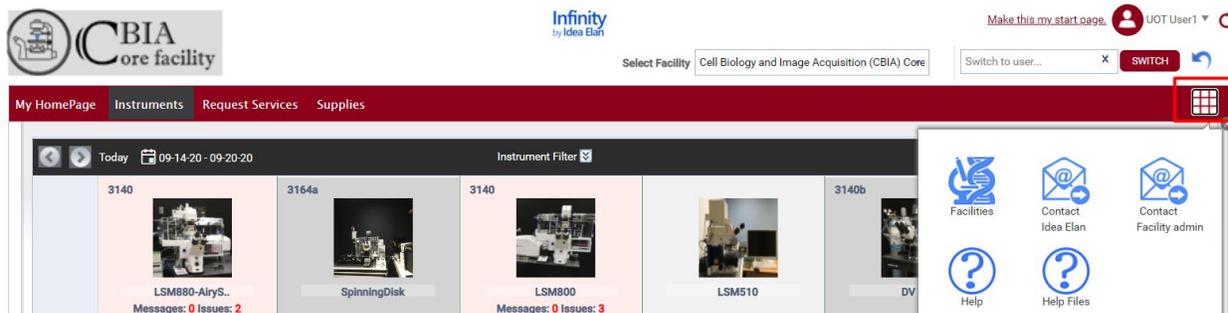
Email	<input type="text" value="U1_UOT@yahoo.com"/>	Address:	<input type="text"/>
First Name*	<input type="text" value="User1"/>	City:	<input type="text"/>
Last Name*	<input type="text" value="UOT"/>	State:	<input type="text"/>
Designation	<input type="text" value="Select Designation"/> <input type="button" value="SELECT"/>	Zip Code:	<input type="text"/>
Upload Photo	<input type="button" value="Upload Photo"/>	Country:	<input type="text" value="Canada"/>
<input type="checkbox"/> Sync reservations/tasks with <input checked="" type="radio"/> Outlook <input type="radio"/> Google Calendar		Fax:	<input type="text"/>
		Phone:	<input type="text" value="Enter Phone Number"/>

Below the 'User Details' section, there is a 'Change Password' section with 'Password' and 'Confirm Password' fields. At the bottom of the form, there is a green 'UPDATE' button and a vertical 'help' button on the right side.

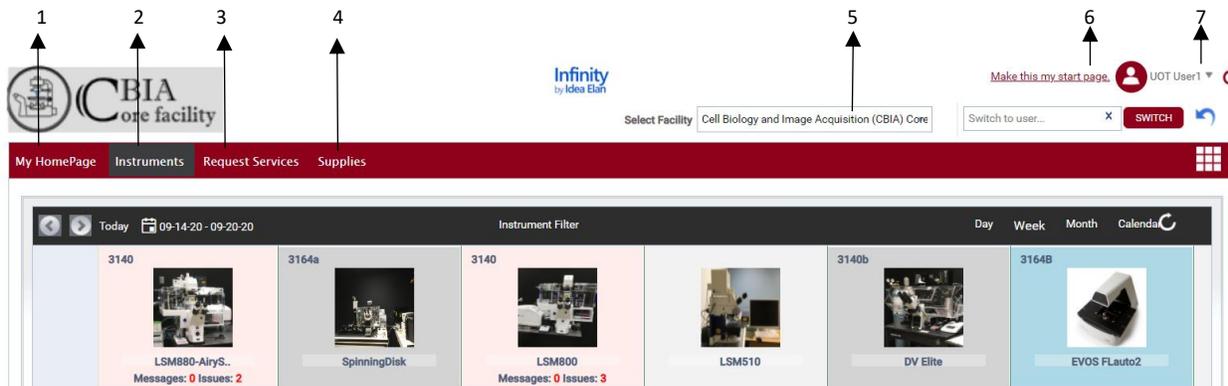
- The new user registration process is now complete.

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.

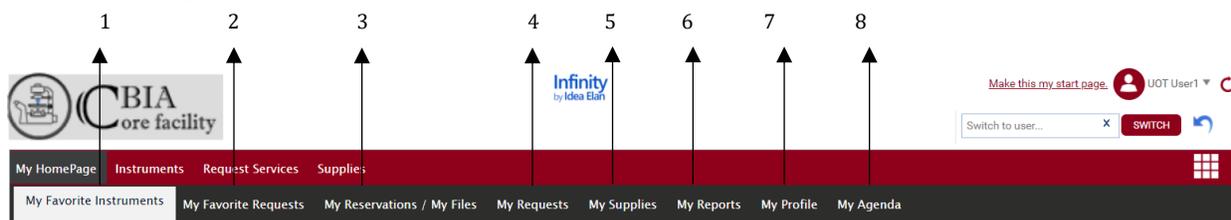


User Functions:



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:

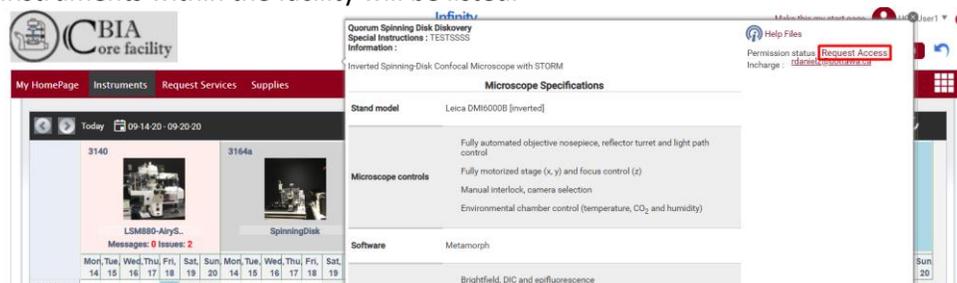


1. **My Favorite Instruments:** Displays Instruments set as favorite with a calendar to aid in making quick reservations.
2. **My Favorite Requests:** Displays all sample submission forms and service requests set as favorite by the user.
3. **My Reservations:** To view the instrument reservations made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

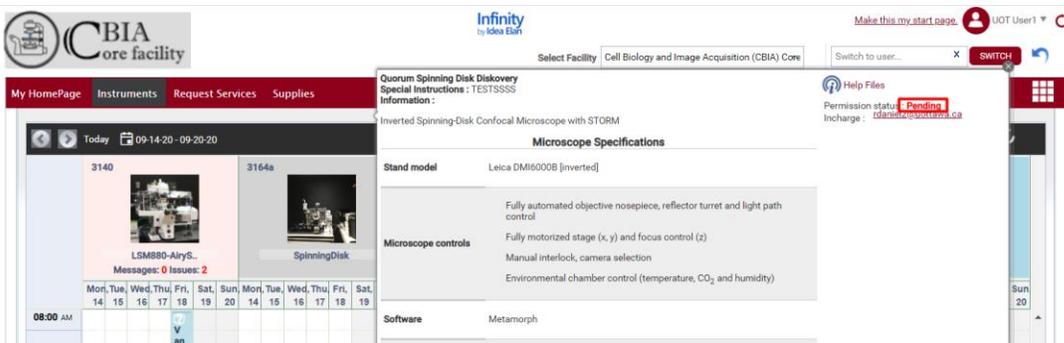
Instruments

How to access instruments:

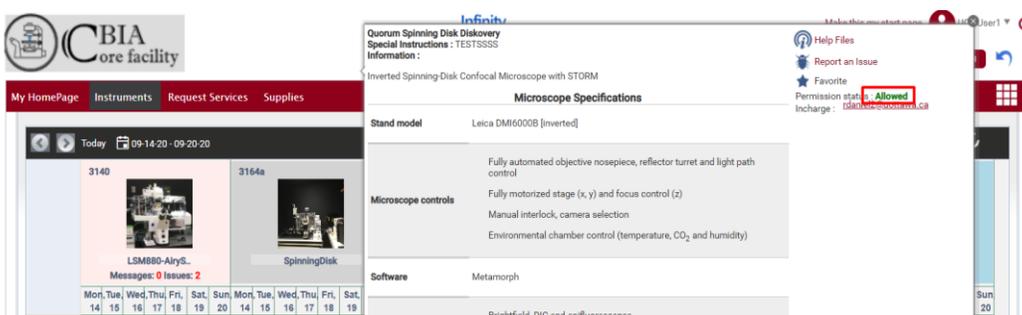
- To request access to instruments, hover over the instrument on the calendar, click on Request Access.
- All Instruments within the facility will be listed.



- 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.

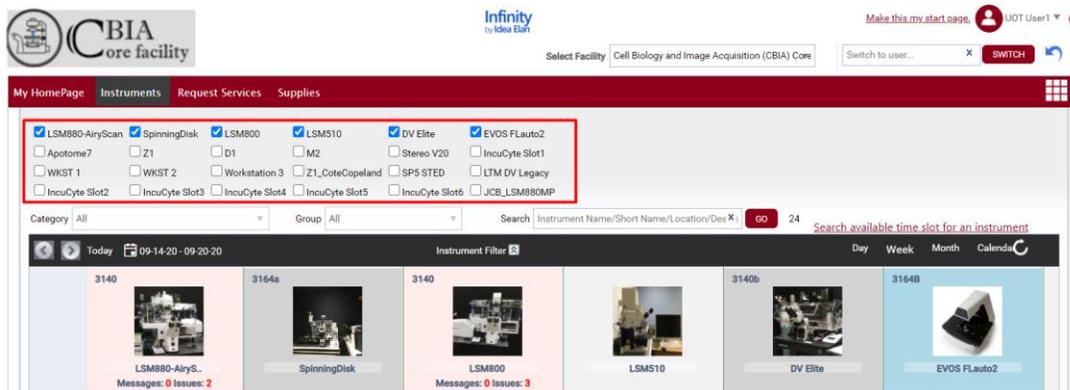


- If the settings are set as auto-approve by the admin, then the request will be automatically approved. The user will then be able to make reservations.

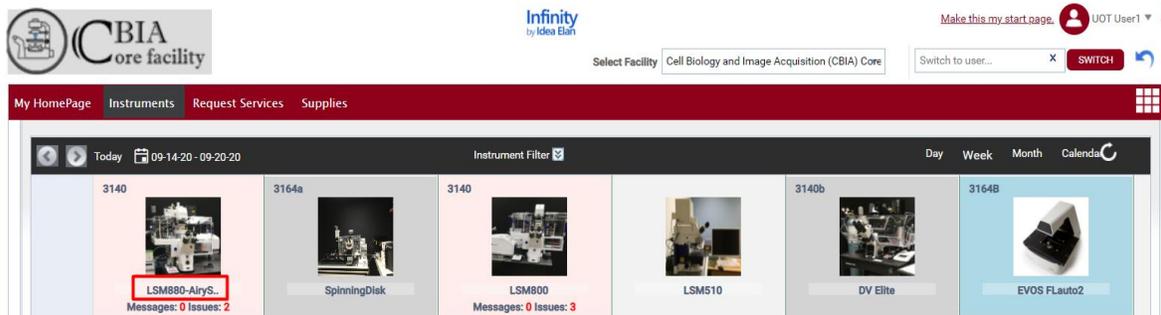


How to make a reservation:

- 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.



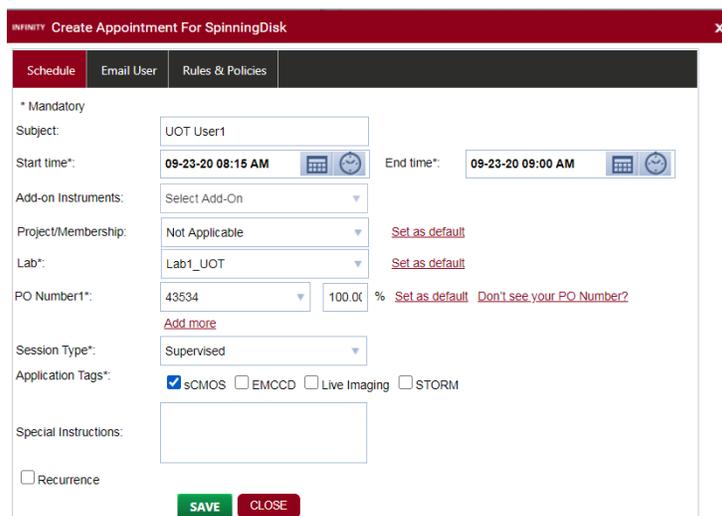
- Select an instrument; drag on the calendar to create a reservation.



The screenshot shows the 'Infinity by Idea Elan' interface for the 'Cell Biology and Image Acquisition (CBI A) Core' facility. A navigation bar includes 'My HomePage', 'Instruments', 'Request Services', and 'Supplies'. Below, a calendar view for 'Today' (09-14-20 - 09-20-20) displays a grid of instrument reservation cards. The cards include:

- 3140: LSM880-AiryS... (Messages: 0 Issues: 2) - highlighted with a red box.
- 3164a: SpinningDisk
- 3140: LSM800 (Messages: 0 Issues: 3)
- LSM510
- 3140b: DV Elite
- 3164B: EVOS FLauto2

- In the reservation window, users must select their Lab, PO, and Session Type.



The screenshot shows the 'Create Appointment For SpinningDisk' form. The 'Schedule' tab is active. Fields include:

- Subject: UOT User1
- Start time*: 09-23-20 08:15 AM
- End time*: 09-23-20 09:00 AM
- Add-on Instruments: Select Add-On
- Project/Membership: Not Applicable
- Lab*: Lab1_UOT
- PO Number*: 43534, 100.00%
- Session Type*: Supervised
- Application Tags*: sCMOS, EMCCD, Live Imaging, STORM
- Special Instructions: (empty text area)
- Recurrence:

- Confirm the usage fee and click on OK.



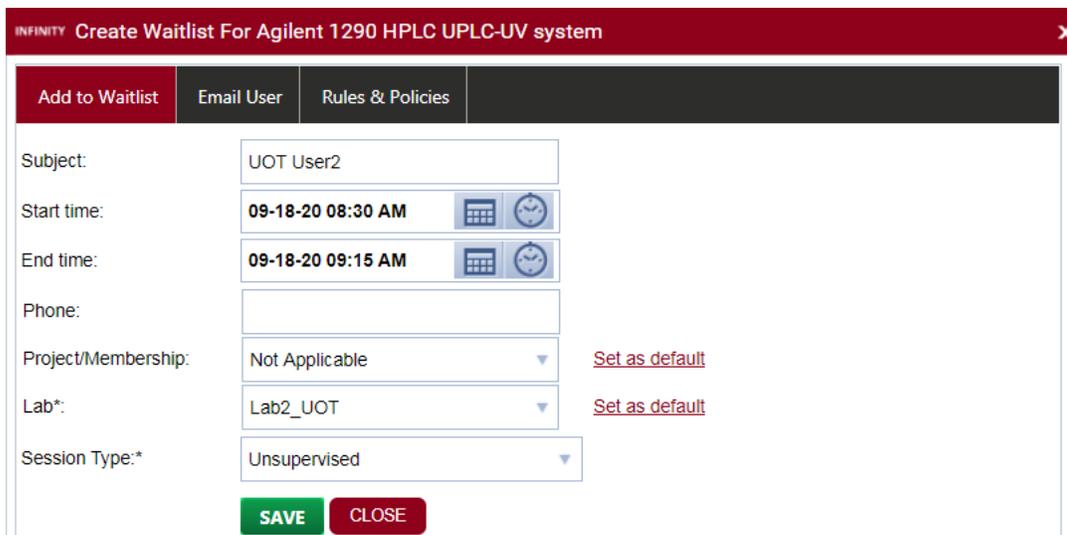
The confirmation dialog box displays the following information:

- Confirmation
- Total Usage Fee: 41.25 CAD
- Are you sure want to continue
- Buttons: OK, CANCEL

- A reservation will be created.

How to make a wait-list appointment:

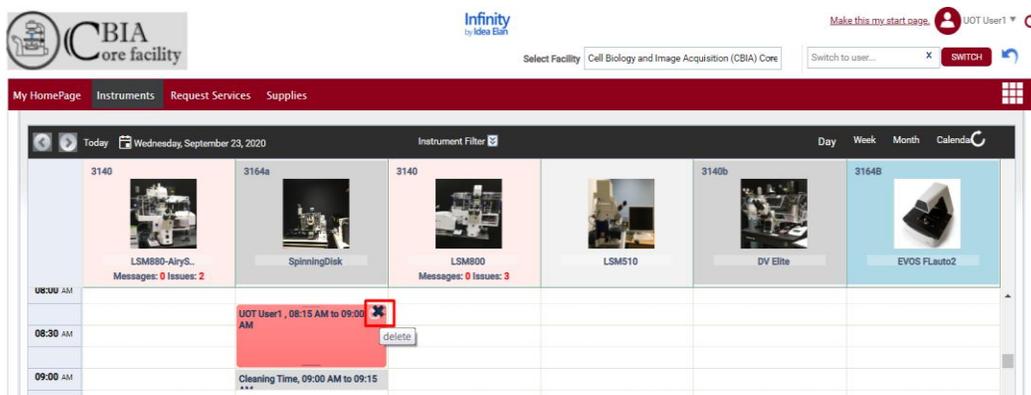
- When User A has created an appointment and User B wants to have the same slot for the same instrument, then User B creates a wait list appointment by clicking on the appointment created by User A. Then click on SAVE.



- A wait list appointment will be created.

How to delete a reservation:

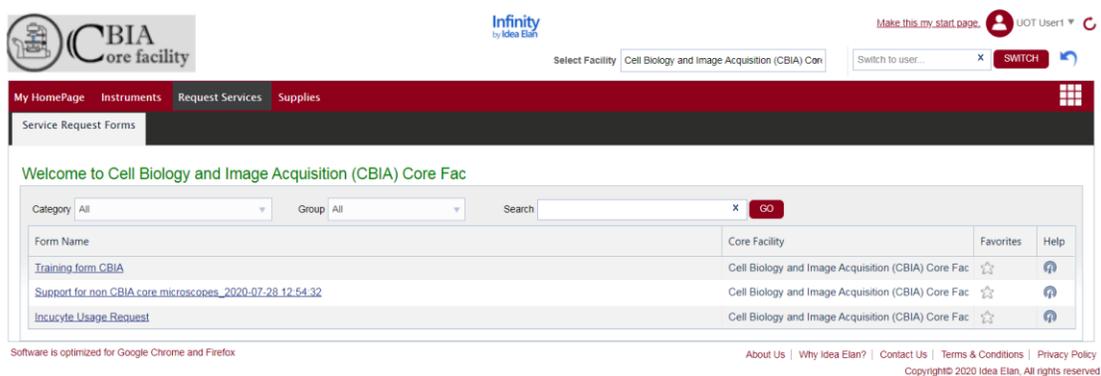
- When the User hovers over the appointment to be deleted, an **X** symbol appears. Click on **X** to delete the appointment.



Request Services

How to fill out and submit a request form

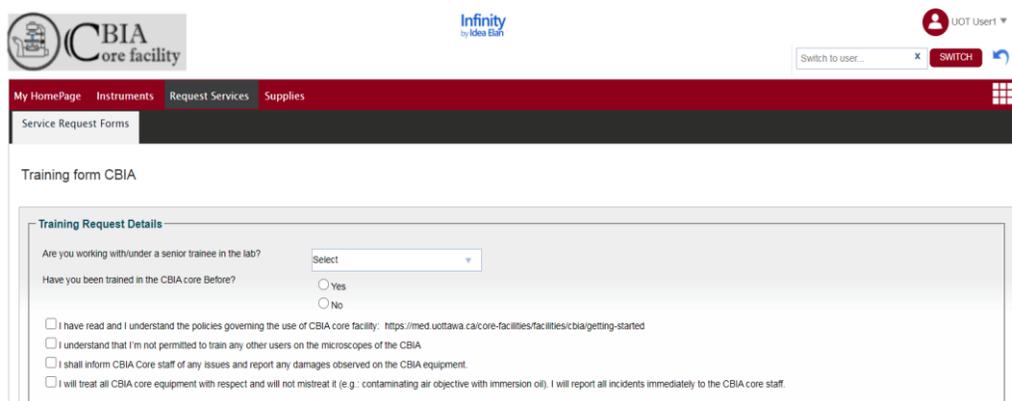
- Sample submission forms are provided for each facility under the “Request Services” tab. Forms can be favorited for quicker access.
- All the Help files uploaded by the admin while creating the sample submission form can be seen beside the favorite icon.
- If the User faces any issue while using the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



The screenshot shows the 'Request Services' tab selected in the navigation menu. Below the navigation bar, there is a search bar and a table of service request forms. The table has columns for 'Form Name', 'Core Facility', 'Favorites', and 'Help'. The forms listed are:

Form Name	Core Facility	Favorites	Help
Training form CBIA	Cell Biology and Image Acquisition (CBIA) Core Fac	☆	?
Support for non CBIA core microscopes_2020-07-28 12:54:32	Cell Biology and Image Acquisition (CBIA) Core Fac	☆	?
Incucyte Usage Request	Cell Biology and Image Acquisition (CBIA) Core Fac	☆	?

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



The screenshot shows the 'Training form CBIA' submission page. The form is titled 'Training Request Details' and contains the following fields and options:

- Are you working with/under a senior trainee in the lab? (Dropdown menu)
- Have you been trained in the CBIA core Before? (Radio buttons for Yes and No)
- Checkboxes for terms and conditions:
 - I have read and I understand the policies governing the use of CBIA core facility: <https://med.utorawa.ca/core-facilities/facilities/cbia/getting-started>
 - I understand that I'm not permitted to train any other users on the microscopes of the CBIA
 - I shall inform CBIA Core staff of any issues and report any damages observed on the CBIA equipment.
 - I will treat all CBIA core equipment with respect and will not mistreat it (e.g.: contaminating air objective with immersion oil). I will report all incidents immediately to the CBIA core staff.

- 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.

Lab and Payment/Account Information

Please select the lab and account code you want to tag this sample submission form to

Phone:

Project/Membership: [Set as default](#)

Lab*: [Set as default](#)

PO Number1*: % [Set as default](#) [Don't see your PO Number?](#)
[Add more](#)

Special Instructions:

Sample Submission cannot be modified.
Your Sample Submission will be saved in My Requests under My HomePage

Software is optimized for Google Chrome and Firefox

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- 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.

Change Sample Submission Status

Current Status: Quote
Next: Waiting for approval by User/PI

Comments:

Upload Files:

Cancel a Request Form:

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

Change Sample Submission Status

Current Status: Approval Process (Approved by User)

Comments:

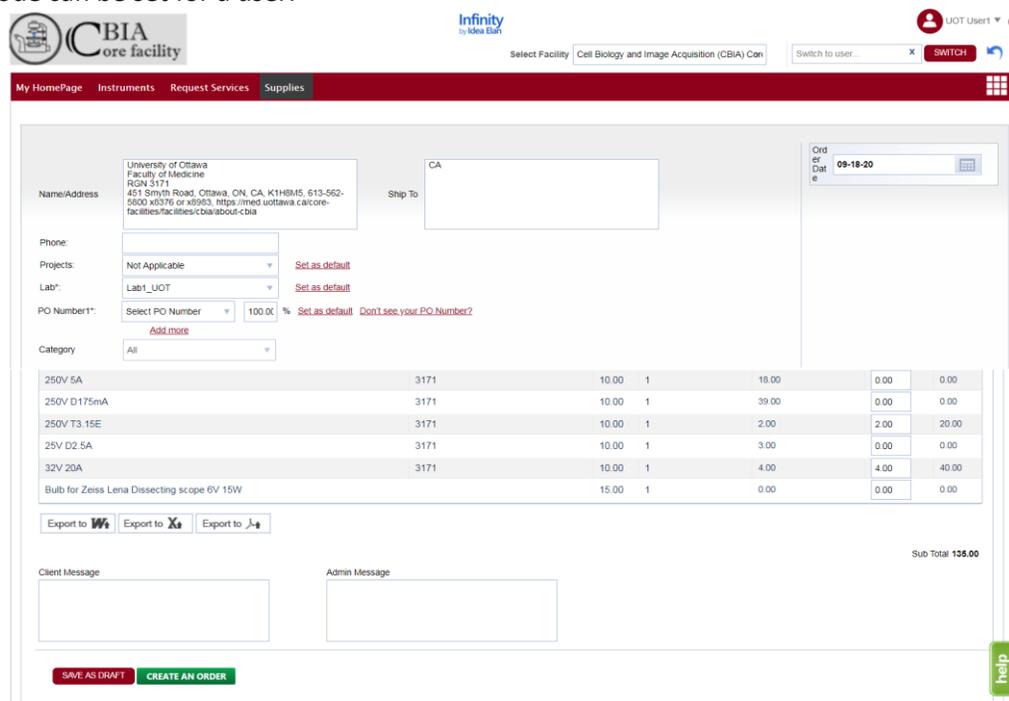
CANCEL FORM

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.



University of Ottawa
Faculty of Medicine
RCN 3171
451 Smyth Road, Ottawa, ON, CA, K1H8M6, 613-562-5800 x3376 or x4063, <https://med.uottawa.ca/core-facilities/facilities/cbia/about-cbia>

Ship To: CA

Order Date: 09-18-20

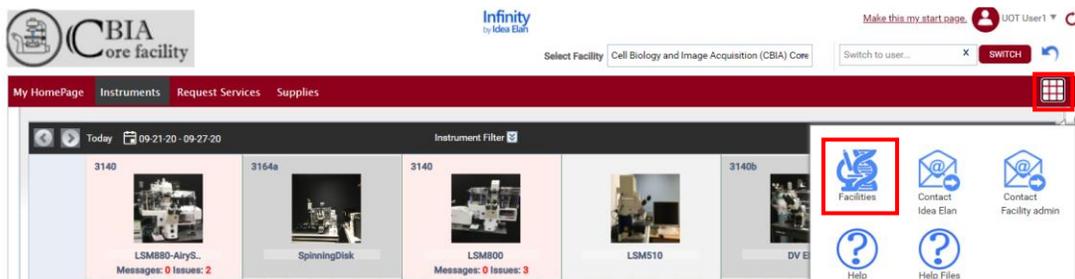
250V 5A	3171	10.00	1	18.00	0.00	0.00
250V D175mA	3171	10.00	1	39.00	0.00	0.00
250V T3.15E	3171	10.00	1	2.00	2.00	20.00
25V D2.5A	3171	10.00	1	3.00	0.00	0.00
32V 20A	3171	10.00	1	4.00	4.00	40.00
Bulb for Zeiss Lena Dissecting scope 6V 15W		15.00	1	0.00	0.00	0.00

Sub-Total: 135.00

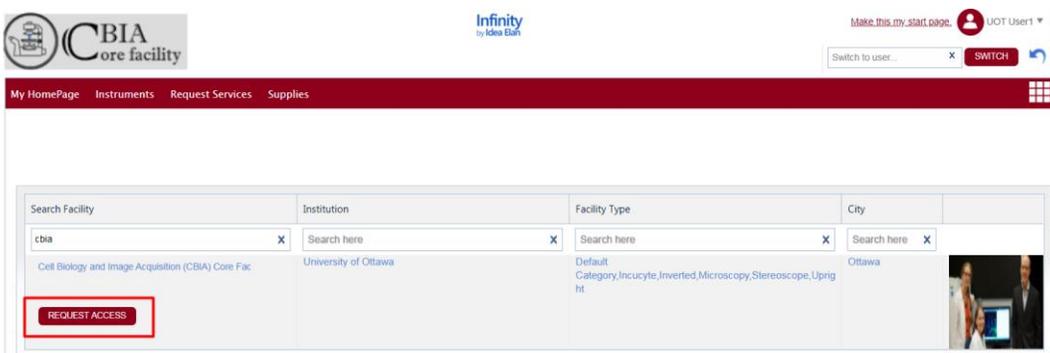
Buttons: Export to Export to Export to SAVE AS DRAFT CREATE AN ORDER

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.

INFINITY Facility Access Request form

If you are starting a new project that requires microscopy-based experiments

Contact CBIA Core Facility

If you request access to the facility to be trained on one of our microscopes please fill the training form: [training form](#)

If you encounter any issue email cbia:core@uottawa.ca [CBIA core website](#)

REQUEST ACCESS
CLOSE

Submitted Facility Access Request cannot be modified.



The screenshot shows the Idea Elan web interface. At the top left is the 'CBIA Core facility' logo. In the center is the 'Infinity by Idea Elan' logo. On the right, there is a user profile for 'UOT User1' and a 'Switch to user...' dropdown menu. Below the navigation bar, there is a search table with the following data:

Search Facility	Institution	Facility Type	City
Cell Biology and Image Acquisition (CBA) Core Fac Current Status: Waiting for approval	University of Ottawa	Default Category: Incubator, Inverted Microscopy, Stereoscope, Upright	Ottawa

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