



**Idea Elan**

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**2018**

**Caltech User Quick Guide for  
Infinity Software**

**Comprehensive Online Solution for  
Lab and Core Facility Management**

13800 Coppermine Rd,  
Herndon, VA 20171

Phone: 1-800-506-5905

Email: [support@ideaelan.com](mailto:support@ideaelan.com)

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## Quick Startup Guide

### Accessing Infinity

#### Internal User Login:

Internal Caltech users will login using:

<https://secure1.ideaelan.com/secure/public/applogin.aspx>

After following the link, users will login using their Caltech credentials.



You are about to access:

[secure1.ideaelan.com](https://secure1.ideaelan.com)

**Username**

**Password**

Login

#### External User Login:

External Caltech users will login using:

<https://secure1.ideaelan.com/Caltech/public/applogin.aspx>

## New User Registration Process:

Users can register on the first page of the Infinity link.  
Enter First Name, Last Name, Email ID, and Password and click on Join Now Button.



The image shows a registration form titled "Get started – Register here for free." with the subtext "Registration takes less than 2 minutes." The form includes the following fields and annotations:

- First Name:** A text input field.
- Last Name:** A text input field.
- Email(Login ID):** A text input field with an annotation box pointing to it that says "Enter the user id here".
- Password (8-13 characters):** A text input field with an annotation box pointing to it that says "Enter the password here".
- Confirm Password:** A text input field.
- Image:** A CAPTCHA image showing the characters "4780" with a small "C" to the right.
- Text:** "To avoid spam, please type the characters you see above" below the CAPTCHA image.
- Input:** A text input field for the CAPTCHA characters.
- Join Now:** A yellow button with the text "Join Now" and an annotation box pointing to it that says "Click on Join Now".

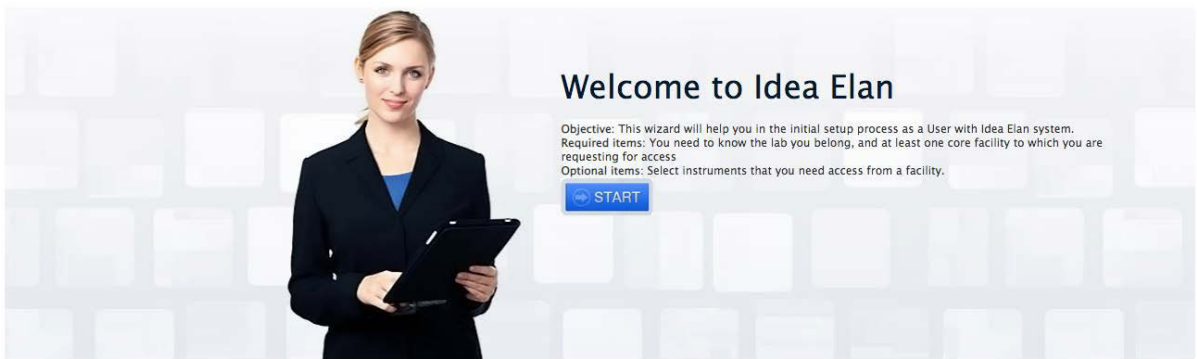
After registering, a confirmation message will appear on the screen. Click the verification link sent to the email provided.

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

After verifying the email, the page will be redirected to a wizard to help with the registration process.



Welcome User Test



**Welcome to Idea Elan**

Objective: This wizard will help you in the initial setup process as a User with Idea Elan system.  
 Required items: You need to know the lab you belong, and at least one core facility to which you are requesting for access  
 Optional items: Select Instruments that you need access from a facility.

[START](#)

Click on the start button to go through the registration process.

In the next page, select access to labs by clicking on “Request Access.”

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



Welcome User Test

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"/>	All
	Adkins Lab	Adkins Jess	CALTECH	Request Access
	ADRx Pharma, Inc.	Treanor James	CALTECH	Request Access
	Agapie	Agapie Theodor	CALTECH	Request Access
	Allen Institute for Brain Science	Mich John	CALTECH	Request Access
	Anderson	Anderson David	CALTECH	Request Access
	Aravin Lab	Aravin Alexei	CALTECH	Request Access
	Arnold Lab	Arnold Frances	CALTECH	Request Access
	Baltimore Lab	Baltimore David	CALTECH	Request Access

On the next page, select access to facilities.

The facility admin will manually approve the incoming requests.



Welcome User Test

Start Lab access **Facility access** Instrument access

< Previous Next >

Facility Name	Address	Facility Admin/Director	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="Search here"/>	All
Protein Expression Center	Pasadena ,California ,US 91125 Pasadena California 91125	CT fac1,Gao Han,Keeffe Jennifer,Vielmetter Jost,Kuipers Andrea,Murphy Kara,shibtest Shibboleth,Lee Yu,Wojtowicz Woj,Kakutani Leesa	CALTECH	Approved
GALCIT Shop	Pasadena	CT Fac3,Haggerty Joseph,Rider Stephanie	CALTECH	Approved
Biological Imaging Facility	Pasadena	Collazo Andres,Anguiano Patricia,Njamen Blaise	CALTECH	Request Access
Biological and Cryo-TEM Facility	Beckman Institute B217 Broad B120 Pasadena California 91125	Anguiano Patricia,McDowall Alasdair,Chen Songye,Malyutin Andrey	CALTECH	Request Access

Now request access to applicable instruments within a facility.

This can be done by clicking on “Request Access” on the right of each instrument.

The Facility Admin will manually approve your Instrument access request.



Welcome User Test

Start Lab access Facility access **Instrument access**

< Previous Continue

Instrument Name	Facility Name	Institution	Permission Status
<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	All
T12	Biological and Cryo-TEM Facility	CALTECH	Approved
BioPlex 200	Protein Expression Center	CALTECH	Pending
Beckman Allegra X-15R Centrifuge	Protein Expression Center	CALTECH	Request Access
AKTA 2	Protein Expression Center	CALTECH	Request Access
AKTA 1	Protein Expression Center	CALTECH	Request Access
BSL2 Hood BI	Biological and Cryo-TEM Facility	CALTECH	Request Access
BSL2 Hood Broad	Biological and Cryo-TEM Facility	CALTECH	Request Access
Laira Cryo Microtome	Biological and Cryo-TEM Facility	CALTECH	Request Access

Click on **Continue** to exit the wizard.

The new user registration process is now complete.

## The User:

Once logged onto Caltech as a user, a toolbar with tabs will appear that are specific to your role.

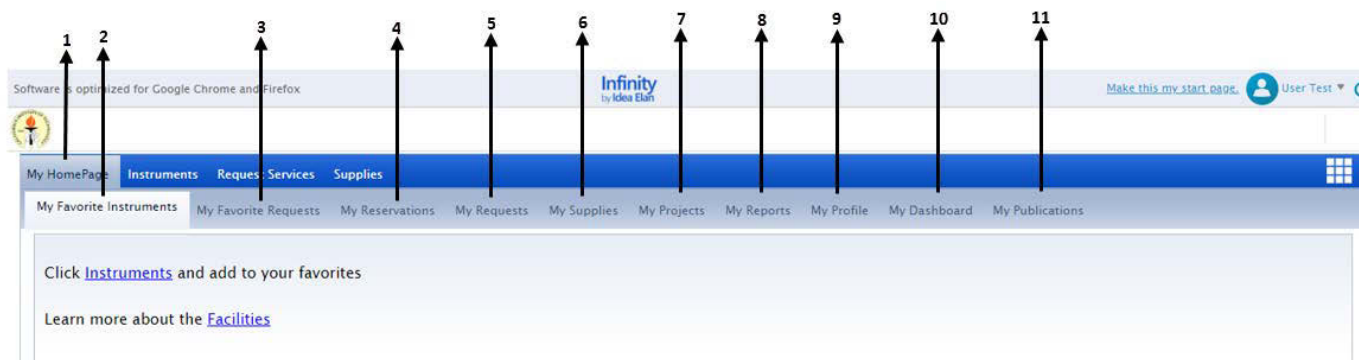
## User Functions:



The screenshot shows the user interface of the Idea Elan system. At the top, there is a navigation bar with tabs: 'My HomePage', 'Instruments', 'Request Services', and 'Supplies'. Below this, there are sub-tabs for 'Sample Submission Forms' and 'Service Forms'. A search bar is present with 'Category' and 'Group' dropdowns, and a 'GO' button. A table lists forms with columns for 'Form Name', 'Core Facility', 'Favorites', 'Help', and 'Report Issue'. The table contains three rows of data. Numbered callouts (1-8) point to specific UI elements: 1 points to the refresh button, 2 to the 'Make this my start page' link, 3 to the 'My HomePage' tab, 4 to the 'Instruments' tab, 5 to the 'Request Services' tab, 6 to the 'Supplies' tab, 7 to the 'Select Facility' dropdown menu, and 8 to the user profile icon.

1. Click on the Refresh button to refresh the page.
2. Click here you can make your current page as the start page.
3. View a homepage that has specified favorite instruments, reservation history, supply orders, service requests, and user profile.
4. Request instruments in a facility and make reservations under the instrument tab.
5. Submit sample forms/ service requests for processing in Request Services tab.
6. Place orders for new supplies from facilities under the supplies tab.
7. Switch between multiple facilities that you have access to
8. My Items List: with quick links to homepage icons, my favorite instruments, favorite requests, etc.

## My Home Page:



1. **My Homepage:** Click for all essential functions, such as calendar and sample submissions
2. **My Favorite Instruments:** Displays Instruments set as favorite with a calendar to aid in making quick reservations.
3. **My Favorite Requests:** Displays all sample submission forms and service requests set a favorite by the user.
4. **My Reservations:** to view the instrument reservations made by the user.
5. **My Requests:** To view sample submissions or service requests made by the user.
6. **My Supplies:** To view submitted supply orders.
7. **My Projects:** To create and view all the projects assigned.
8. **Reports:** Generate user reports based on usage across various facilities, instruments and sample submissions.
9. **My Profile:** Displays the profile of the user; labs and facilities affiliations of the user.
10. **My Dashboard:** Displays the number of samples submitted, and the number of instrument reservations made (graphical representation).
11. **My Publications:** Displays information pertaining to the publication, title, journal, published year and if core was used for publication.

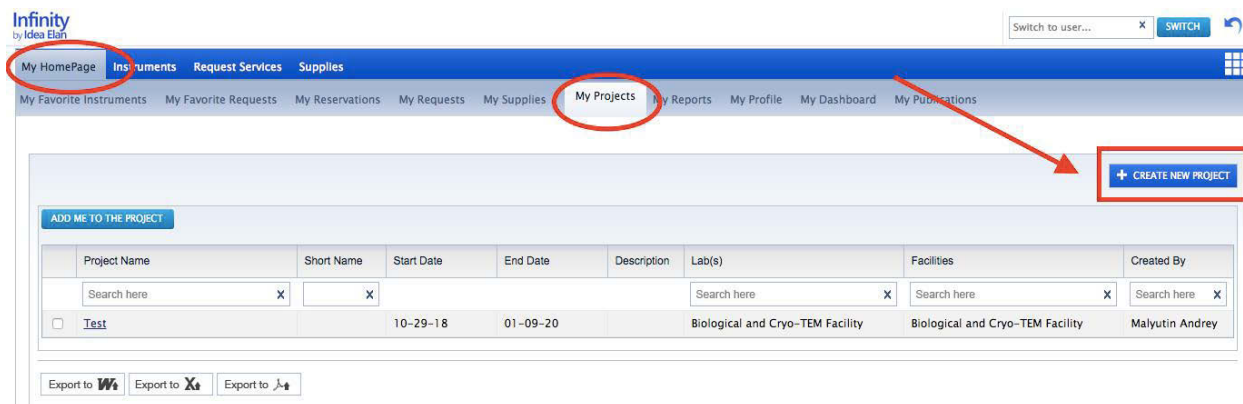


## Projects

Before making a reservation, please set up your project information. Go to:

My HomePage → My Projects

You can add yourself to an existing project or create a new project. Do to this click on “Create New Project”



Infinity  
by Idea Elan

Switch to user... x SWITCH

My HomePage Instruments Request Services Supplies

My Favorite Instruments My Favorite Requests My Reservations My Requests My Supplies My Projects My Reports My Profile My Dashboard My Publications

ADD ME TO THE PROJECT

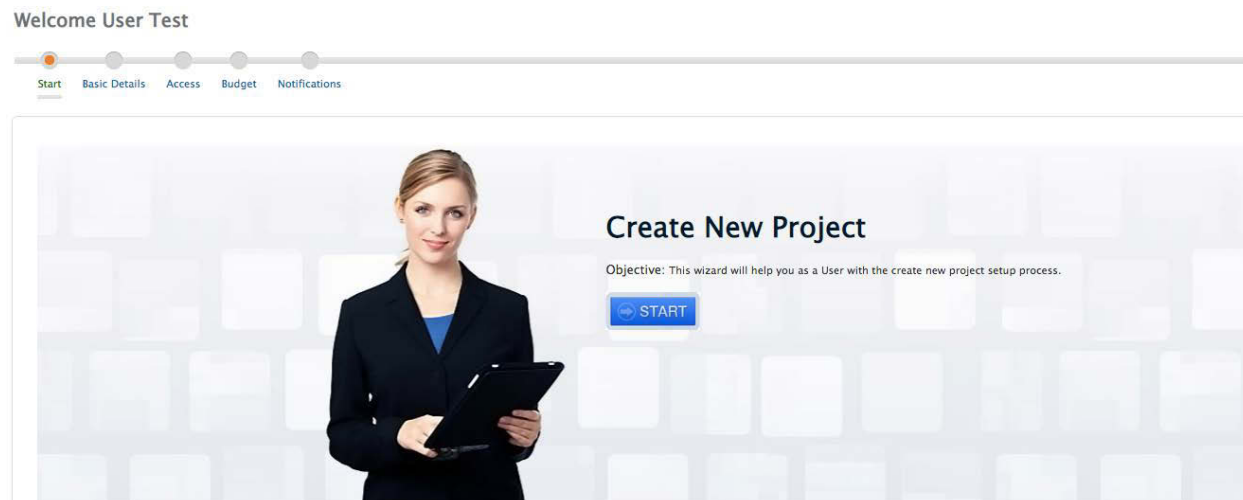
Project Name	Short Name	Start Date	End Date	Description	Lab(s)	Facilities	Created By
Search here x	Search here x				Search here x	Search here x	Search here x
<input type="checkbox"/> Test		10-29-18	01-09-20		Biological and Cryo-TEM Facility	Biological and Cryo-TEM Facility	Malyutin Andrey

Export to

Follow the step by step process to create a new project.

Welcome User Test

Start Basic Details Access Budget Notifications



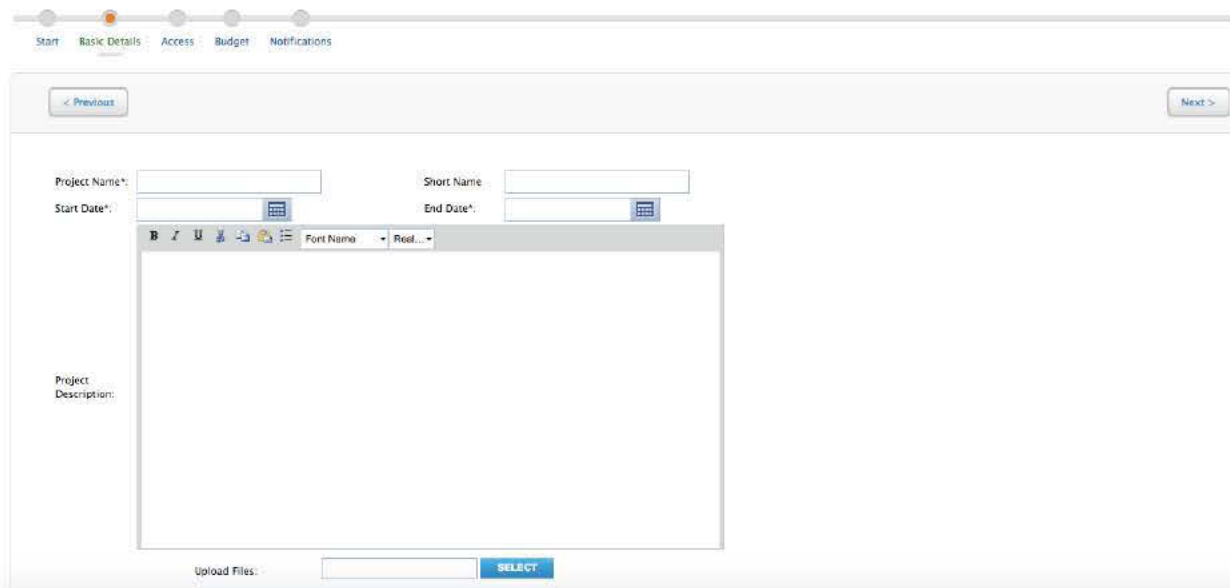
### Create New Project

Objective: This wizard will help you as a User with the create new project setup process.

START

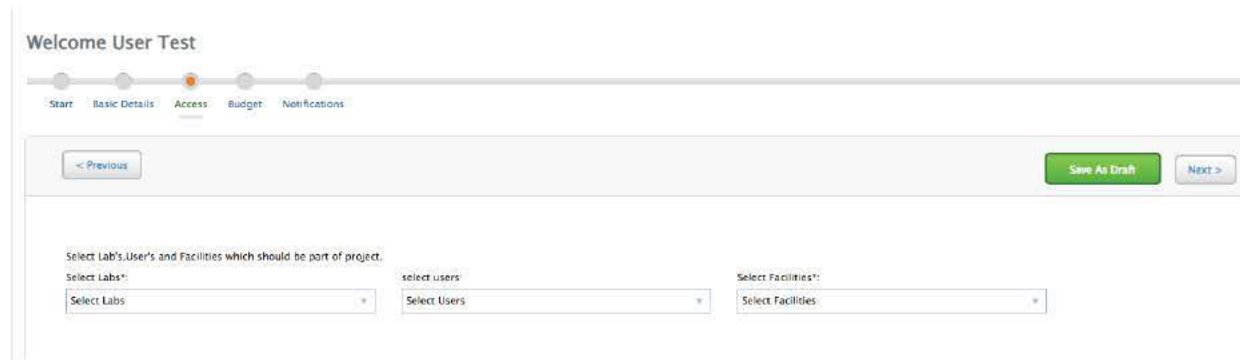
1. Select “Start” to begin.
2. Enter project name, start and estimated end date of the project (all mandatory) and provide a description as well as additional files (only if necessary)

Welcome User Test



Once filled out, click “Next”

3. Provide the lab affiliation for all users involved, select users for the project and the facility  
Select “Next” to move along.



4. Provide your source of funding (PTA code) for this project. You can also set a budget for the project if necessary.  
Select “Next” to move along.

Welcome User Test

Start Basic Details Access **Budget** Notifications

< Previous Save As Draft Next >

Lab Name	PI Name	Source of Funding	Budget
Biological and Cryo-TEM Facility	Anguliano Patricia,McDowall Alasdair,Chen Songye,Malyutin Andrey	Select source of funding Click here to add	0 USD

Total Budget: 0 USD

5. Select which type of notifications should be send out (optional)

Welcome User Test

Start Basic Details Access Budget **Notifications**

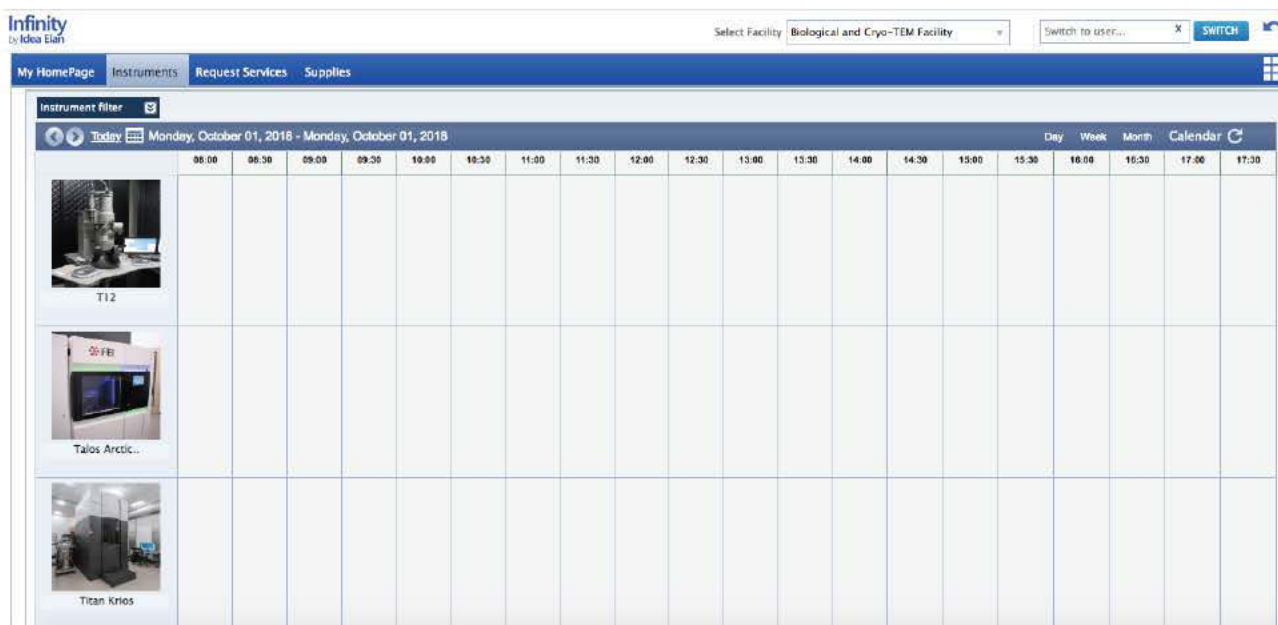
< Previous Save As Draft Save & Exit

Notifications	
Notify when approvals are made by Facility Admin or PI/Lab Admin?	<input type="checkbox"/>
Send Notifications to the Project Manager [X days] before the project end date	0
Send Notification to each PI/Lab Admin to generate Monthly/Quarterly report	<input type="checkbox"/>
Send Notifications when new users are added to the project	<input type="checkbox"/>
Send Notification when new PI/Lab Admins are added to the project	<input type="checkbox"/>

6. Once all information are entered, click "Save & Exit" to complete the process

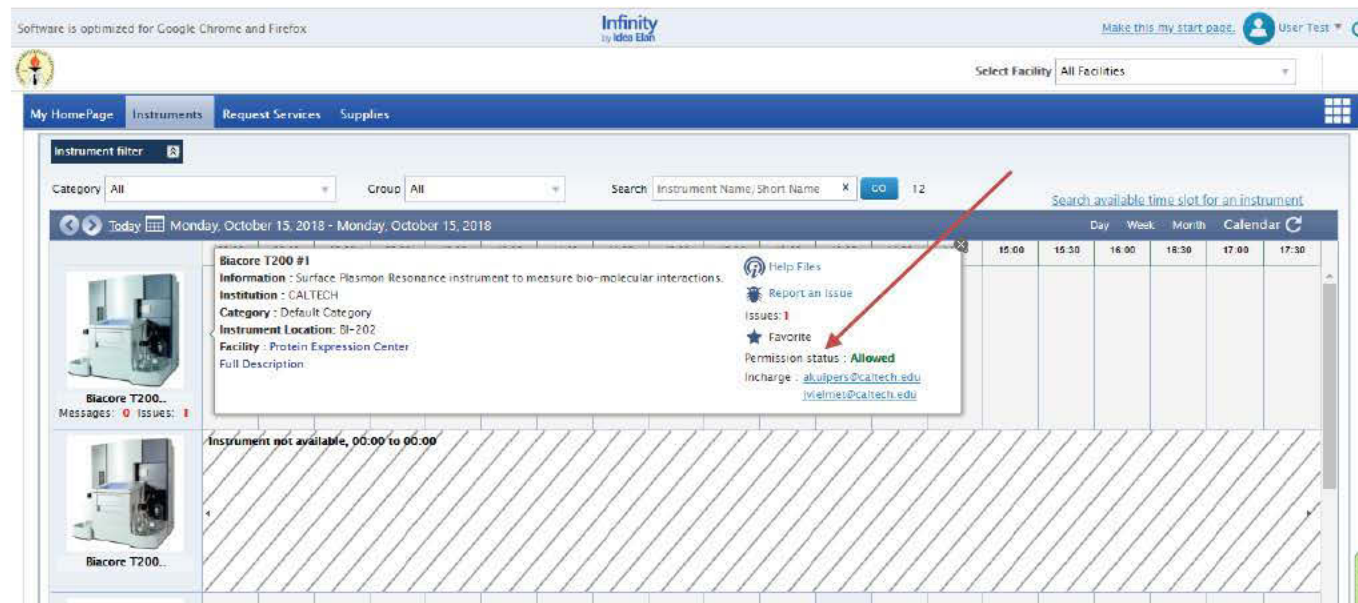
## Instruments

The instruments tab displays all the instruments listed in the facility.

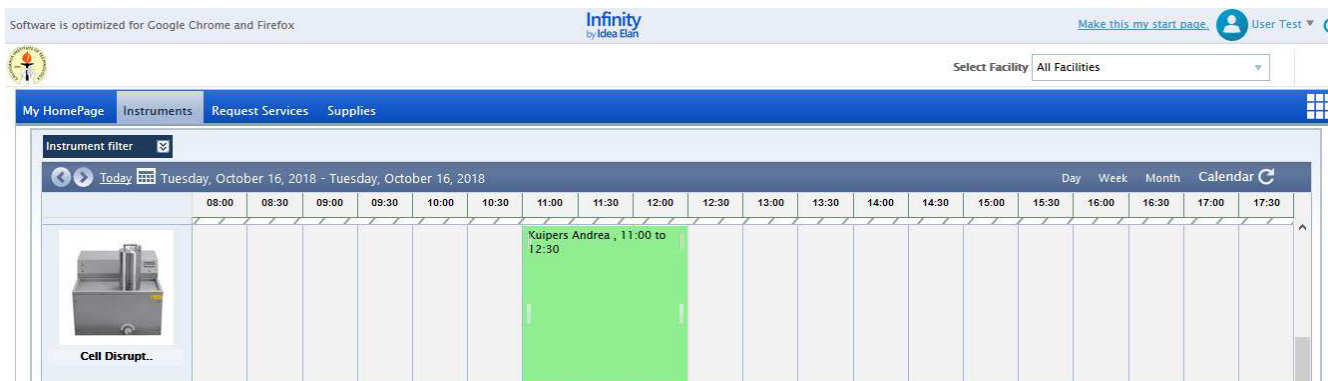


To view descriptions of the instruments, move the mouse pointer over the image. There are the options to mark as favorite and also make reservations. There is also an option to report issues and seek support material for that instrument

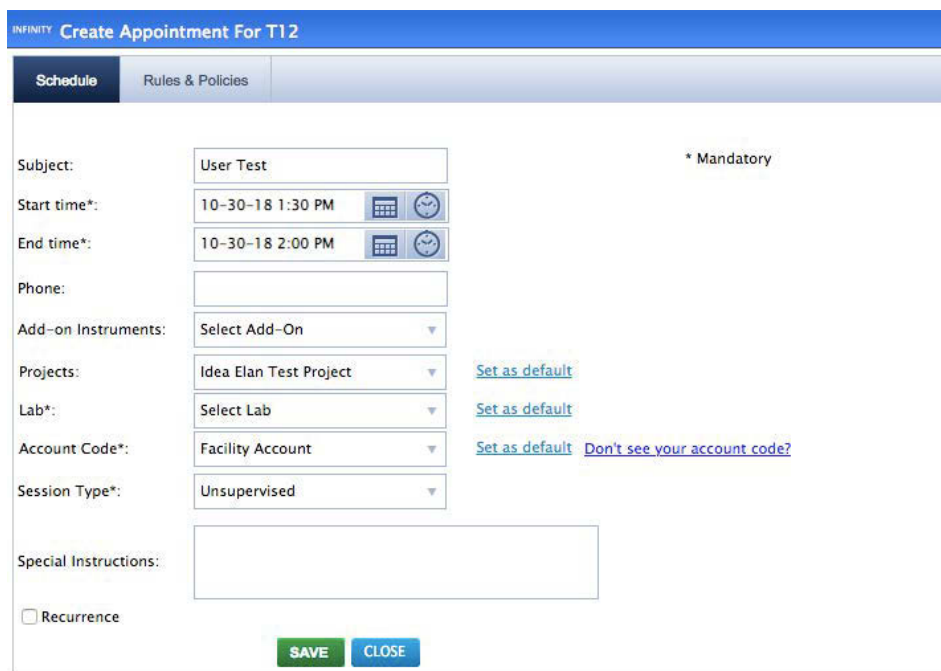
- To make an instrument a favorite, simple click on the star. Selecting this will display the instrument under **“My Favorite Instruments”** on your Homepage.



- To reserve an instrument, click the time slot for which you want to reserve the instrument.



- In the calendar, select the start time. For example, if you want to use the instrument between 11:00 am and 12:30 pm, then click on the box below (11:00 am). A page loads which allows you to select the end time, specify the project, session type, and if you want to use any additional instrument during the same time slot.



- It is mandatory to select an account code (PTA) from the drop down list.

- Rules and Policies for each specific instrument are listed with the reservation field under “Rules & Policies”

INFINITY Create Appointment For Talos Arctica

Schedule Rules & Policies

User

- Reservations cannot be made more than 30.00 days in advance.
- A user cannot reserve an instrument for more than 3.00 days.
- Minimum appointment duration block is 24.00 hours applicable on Total Hours.
- Multiple users can't make reservations for the same project on the same instrument, at the same time

- It is also possible to create a waitlist reservation, in case the instrument you want to use has already been reserved by another user.

INFINITY Create Waitlist For Cell Disruptor

Add to Waitlist Email User Rules & Policies

Subject: User Test

Start time: 10-16-18 1:30 PM

End time: 10-16-18 4:00 PM

Phone:

Projects: Not Applicable [Set as default](#)

Lab\*: Lab1\_CT [Set as default](#)

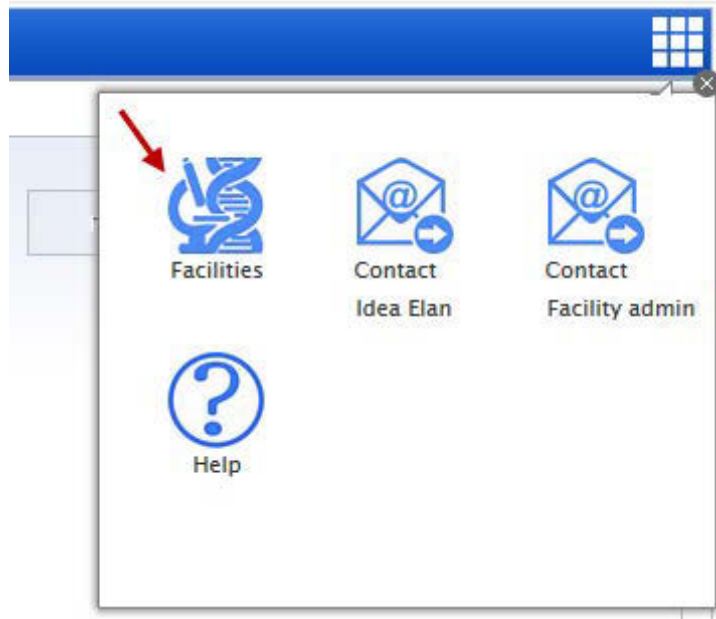
Account Code\*: AC7544 [Set as default](#) [Don't see your account code?](#)

Session Type\*: Training





SAVE CLOSE

## Access other Facilities within the same institution

To request access to other facilities, click on the 9 square grid box on the right side of the page. Then click on the blue DNA and Microscope Icon.



All facilities within the institution will be listed.

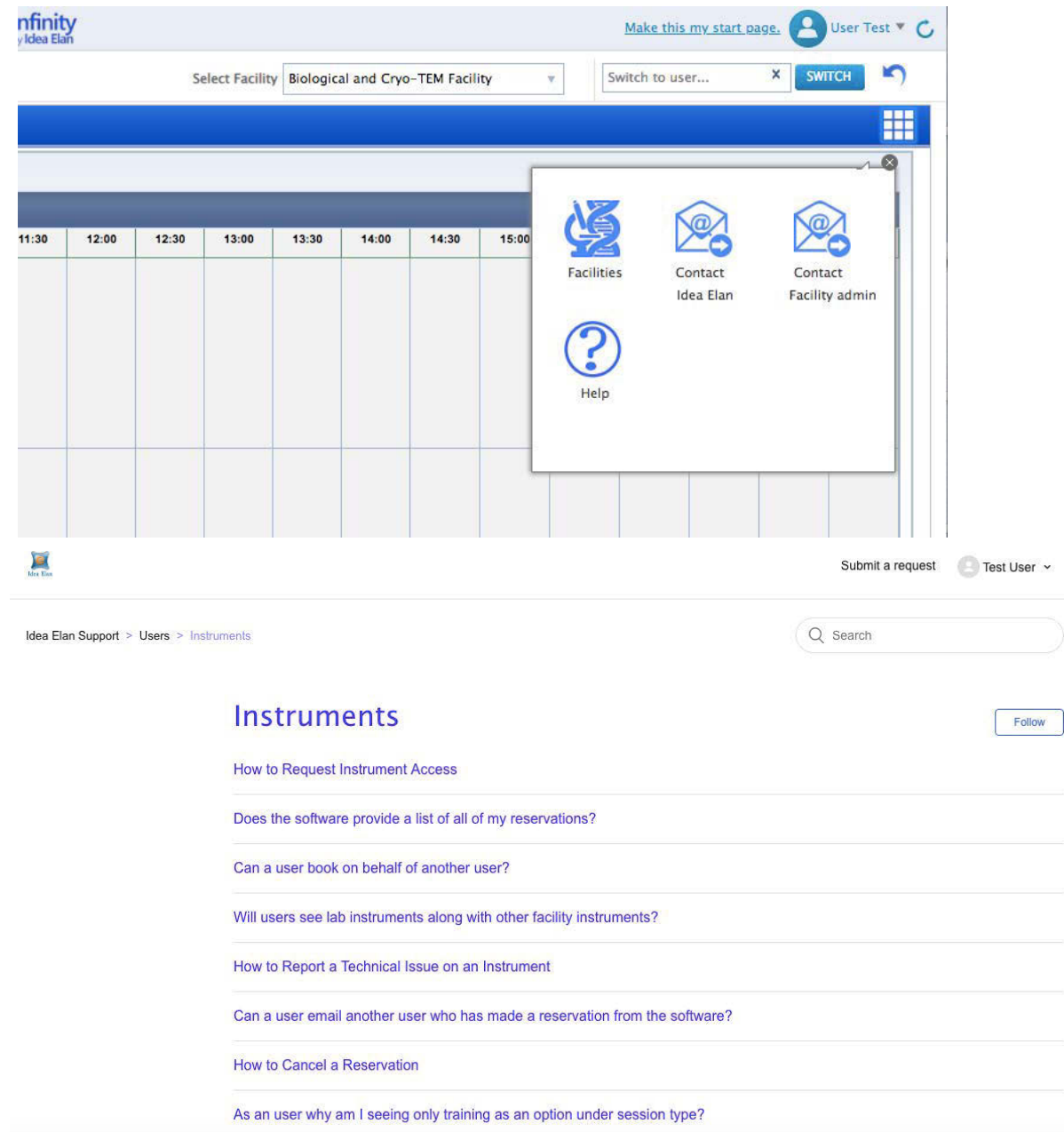
Search Facility	Institution	Facility Type	City	
<input type="text" value="Search here"/> x Protein Expression Center Current Status : <span style="color: green;">Approved</span> <a href="#">Make a Reservation</a> <a href="#">Submit Samples</a> <a href="#">Order Supplies</a>	CALTECH	Assay Support,Default Category,Facility Use,Protein Analysis,Protein Downstream Processing,Protein Expression,Purified Proteins	Pasadena	 Facility Image
<a href="#">REQUEST ACCESS</a>	CALTECH	Default Category,Microscopy	Pasadena	 Facility Image
GALTIT Shop Current Status : <span style="color: green;">Approved</span> <a href="#">Make a Reservation</a> <a href="#">Submit Samples</a> <a href="#">Order Supplies</a>	CALTECH	Default Category	Pasadena	 Facility Image
<a href="#">REQUEST ACCESS</a>	CALTECH	Default Category	Pasadena	 Facility Image

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.



## Access Help Options

To request access to Help Options, click on the 9 square grid box on the right side of the page. Here you have the option to contact Idea Elan or the Facility admin. In addition, you can access the Idea Elan Help page to read articles or search for answer to specific questions.



The screenshot shows the Idea Elan web interface. At the top, there is a navigation bar with the 'nfinity by Idea Elan' logo, a link to 'Make this my start page.', and a user profile for 'User Test'. Below this is a 'Select Facility' dropdown menu set to 'Biological and Cryo-TEM Facility' and a 'Switch to user...' button with a 'SWITCH' button. The main content area features a calendar grid with time slots from 11:30 to 15:00. A 3x3 grid icon in the top right corner of the calendar area is highlighted, and a help menu is overlaid on it. The help menu contains four options: 'Facilities' (with a microscope icon), 'Contact Idea Elan' (with an envelope icon), 'Contact Facility admin' (with an envelope icon), and 'Help' (with a question mark icon). At the bottom of the calendar area, there is a 'Submit a request' button and a user profile for 'Test User'. Below the calendar, there is a breadcrumb trail: 'Idea Elan Support > Users > Instruments', a search bar, and a 'Follow' button. The 'Instruments' section lists several help topics: 'How to Request Instrument Access', 'Does the software provide a list of all of my reservations?', 'Can a user book on behalf of another user?', 'Will users see lab instruments along with other facility instruments?', 'How to Report a Technical Issue on an Instrument', 'Can a user email another user who has made a reservation from the software?', 'How to Cancel a Reservation', and 'As an user why am I seeing only training as an option under session type?'.