Caltech User Quick Guide for
Infinity Software

Comprehensive Online Solution for
Lab and Core Facility Management

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Quick Startup Guide

Accessing Infinity
Internal User Login:

Internal Caltech users will login using:

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

External User Login:
External Caltech users will login using:
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.

After registering, a confirmation message will appear on the screen. Click the verification link sent to the email provided.
After verifying the email, the page will be redirected to a wizard to help with the registration process.

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”.

<table>
<thead>
<tr>
<th>Set default lab</th>
<th>Lab Name</th>
<th>Lab Admin</th>
<th>Institute</th>
<th>Permission Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adkins Lab</td>
<td>Adkins Jess</td>
<td>X</td>
<td>CALTECH</td>
<td>Request Access</td>
</tr>
<tr>
<td>ARx Pharma, Inc.</td>
<td>Trainer James</td>
<td>X</td>
<td>CALTECH</td>
<td>Request Access</td>
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<tr>
<td>Apache</td>
<td>Apache Theodor</td>
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<td>CALTECH</td>
<td>Request Access</td>
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<tr>
<td>Allen Institute for Brain Science</td>
<td>Mich John</td>
<td>X</td>
<td>CALTECH</td>
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</tr>
<tr>
<td>Anderson</td>
<td>Anderson David</td>
<td>X</td>
<td>CALTECH</td>
<td>Request Access</td>
</tr>
<tr>
<td>Aravin Lab</td>
<td>Aravin Alexei</td>
<td>X</td>
<td>CALTECH</td>
<td>Request Access</td>
</tr>
<tr>
<td>Arnold Lab</td>
<td>Arnold Frances</td>
<td>X</td>
<td>CALTECH</td>
<td>Request Access</td>
</tr>
<tr>
<td>Baltimore Lab</td>
<td>Baltimore David</td>
<td>X</td>
<td>CALTECH</td>
<td>Request Access</td>
</tr>
</tbody>
</table>
On the next page, select access to facilities.

The facility admin will manually approve the incoming requests.

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.

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:

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 this by clicking on “Create New Project”

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

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

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”

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

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.