

How to use the Cellular and Molecular Imaging Facility Online Submission System

This user's guide was developed to guide our customer's through our new online submission system to request services, supplies, or schedule equipment use. While the Mendix platform is very intuitive, this guide may be useful for quickly navigating the system. For more information on how to use this system, please visit <https://support.labs.ncsu.edu/>.

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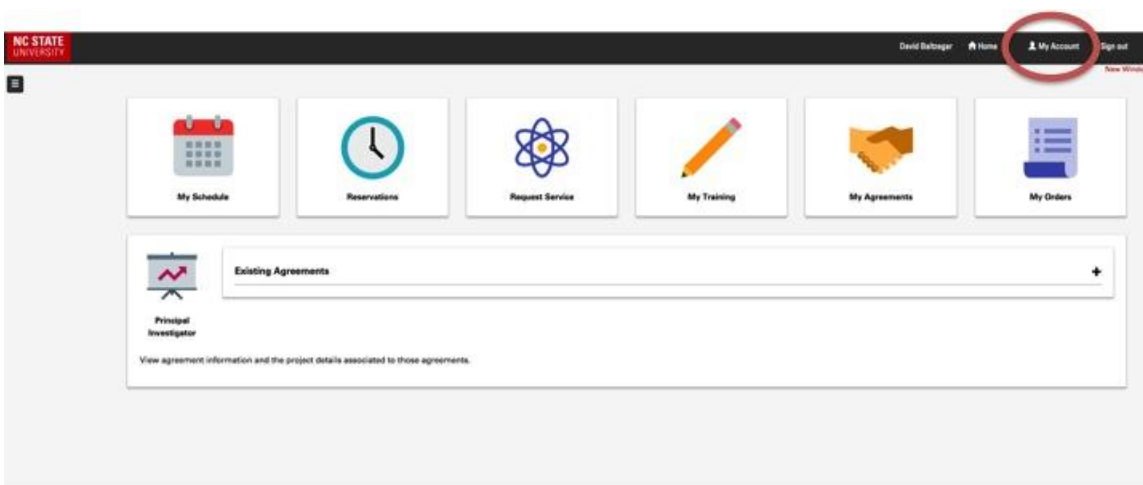
I. How to Login to the CMIF Lab Management Site

1. Click on the CMIF Lab Management portal link on the CMIF website, or visit labs.ncsu.edu.
2. For **internal (NC State) users**, click the red **UNITY ID LOGIN** to log in with your NCSU credentials.
 - a. For **External users**, use the **GUEST LOGIN**.
 - b. For new external users, fill out the signup request information, including billing contact information, in order to open an account. Note: ncsu.edu email accounts cannot be used as external user accounts. If you are an external user at NC State, you will need to use a different email account.



II. Managing your Contact & Billing Information

Users can manage their contact and billing information by clicking on the **My Accounts** section of the top toolbar. There are tabs to update your email, physical address, and phone number. If you are an internal NC State user, some of the fields may not be editable and are tied to the University system. This is primarily for external users to update their contact information.



III. Navigating your Account Homepage

Once you've successfully logged in, your Homepage will have a variety of icons to select from. You can return to this menu at anytime by selecting **Home** on the top toolbar.

My Schedule – This icon allows you see dates and times you’ve scheduled for instrument use.

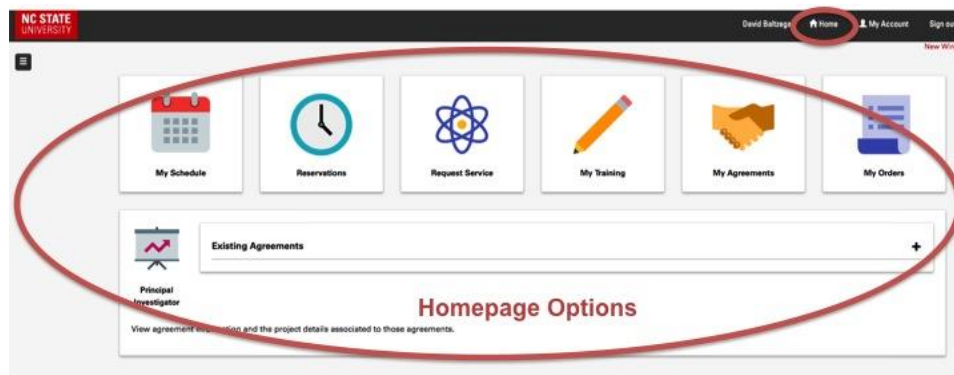
Reservations - Use this icon to schedule equipment use at CMIF. Users will need to select the “Cellular and Molecular Imaging Facility” in the next option as all participating core facilities are listed.

Request Service – Some core facilities provide services as part of their facility structure. Currently, CMIF does not utilize the “Request Service” functionality.

My Training – This icon allows you to see what CMIF equipment you’ve been trained to use. If you were previously trained for an instrument that is not listed you will need to request training again and have it waived. Once your training has been completed or waived, you will be able to schedule equipment use.

My Agreements & Existing Agreements – As part of this improved system, CMIF is encouraging the use of Facility Agreements for students, staff and Principal Investigators. While this form is not currently required, it is strongly recommended and will eventually be required for use of the CMIF.

My Orders – This icon allows you to view existing orders for instrument use or services in the Lab Management system.



IV. Creating Facility Use Agreements

Facility Use Agreements allow PIs to authorize equipment use on their projects up to an established dollar maximum. For example, a PI may authorize a student user to bill their project up to \$2,000 for that student’s use of the Zeiss LSM 880 Confocal Microscope.

To request an agreement, students should:

1. Click on the **My Agreements** icon on the Lab Management home page.
2. Select Request New Agreement in the upper right-hand corner of the My Agreements page.

3. Select Cellular and Molecular Imaging Facility in the Facility drop-down menu. Enter the name of the PI and/or the project ID and hit Search.
4. Select the PI's name and click the **Send Agreement Request** button.

Request Agreement

Select Facility
Facility: Cellular and Molecular imaging Facility

Select Principal Investigator
Instructions:
1) Search for the PI
2) Highlight the PI in the results grid
3) Select Send Agreement Request button

First Name: Eva
Last Name: Johannes
Project Number: []

Search [] Reset []

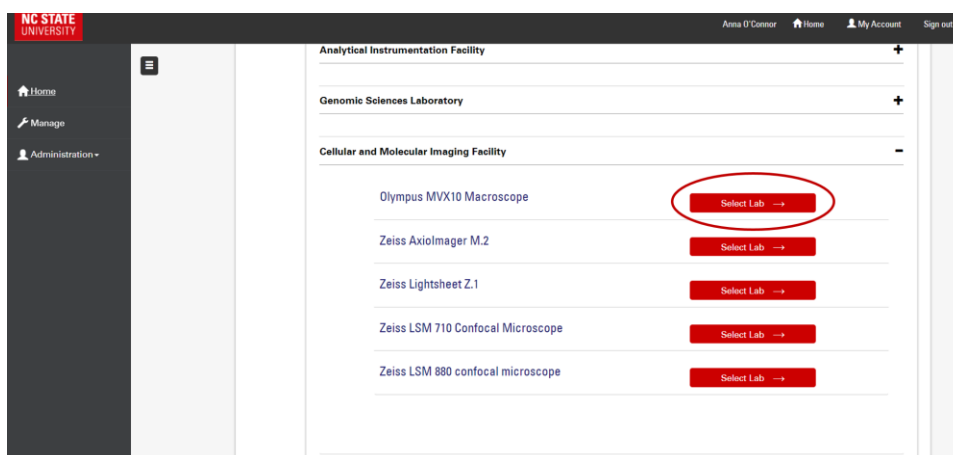
Search [] **Send Agreement Request** []

Name	Email
Eva M Johannes	johannes@ncsu.edu

5. Your agreement request will be send to the selected PI for review and approval. You will be notified via e-mail when the agreement is approved.

V. How to Schedule Equipment Use

1. From your Home page, select **Reservations**.
2. Select "Cellular and Molecular Imaging Facility" from the list of core facilities available. Select the piece of equipment you would like to use. If training is required, you will be prompted to submit times you are available for training before you can schedule the equipment. The Lab Manager will contact you to schedule training. **All new users are required to complete a training event prior to use - You will not able to schedule time on the instrument until this is completed.**



3. **Training:** If training is required, CMIF will receive an internal system notification of your training request. **CMIF will schedule a training event for you that fits with our staff's work schedule and you will receive a notification by email when training is scheduled.** Users that have already been trained will be waived in the system, and do not have to retrain to use the equipment. You can keep tabs on what instruments you've been trained on using the **My Training** icon on your Home Page.
4. Once you are trained, select the instrument as before: **Reservations → Select Laboratory (CMIF) → Select Equipment.** You can schedule time by dragging a window on the calendar or double clicking to the next window.
5. In the next window, you can refine your schedule times as well purchase any additional supplies you may need for instrument use (such as slides, USB Flash Drives and cover slips). When you have completed your selections, click **Continue** to proceed to checkout.

6. Fill out billing information, agree to terms and conditions, and select Finalize Order. For more information on how to fill out your billing information, see Section VI (Completing Your Order).

VI. Completing Your Order (Billing)

When you have completed your selection for a CMIF Reservation, you will be prompted to an order summary page containing cost estimates, additional submission notes or guidelines, and input fields for billing information. *Completion of all the required billing fields are necessary to submit your order.*

Internal Users (NC State)

1. **Select the correct Facility Use Agreement.** If you do not have a Facility Use Agreement, complete steps 1A and 1B below. See section IV for additional information on Facility Use Agreements.
 - a. If you do not have a Facility Use Agreement, enter the internal account to be charged (Project ID).
 - b. **Primary Investigator** – Select the **Add/Change Primary Investigator** button to open a searchable window. User's can search by PI last name, first name, or unity email address. When the correct PI is located, select their name and then click **Select Highlighted PI**.
2. Agree to the Terms of Service and select whether you would like to receive a confirmation email sent to your unity email amount account.
3. When you have provided the requested information, select **Finalize Order** at the bottom of the order summary. This should complete your order.

The screenshot displays the 'Step 3: Select the Facility Agreement or Project ID to be used by billing.' section. It includes a 'Project ID' input field with a red arrow pointing to it from the text 'Insert Project ID for Billing (required)'. Below it is a 'Primary Investigator' section with an 'Add/Change Primary Investigator' button and a red arrow pointing to it from the text 'Select PI'. An 'Additional Billing Comments' section with a text area is also visible.

Step 4: Review Order and Accept Terms

Equipment / Service

Equipment:	Olympus MX10 Microscope
Equipment Notes:	<p><p>This reservation can be cancelled online 48 hours prior to start time. Last minute cancellation during prime time will be charged as ordered. Cancellation outside prime time will not be charged if communicated to the labmanager at the start of the appointment. Prime time is currently not in effect for the MX10 Microscope.</p><p>Check out electronically and write the check in and check out times in the paper note book. If check-in and check-out times differ from the online reservation please provide comments. Your charges will increase if you use the instrument longer than the reserved time. Please finish on time if someone is booked directly after you and power equipment down if nobody reserved it in the next 2 hours.</p><p>Leave a note on the lab manager app if you experience any equipment problems and contact the lab manager immediately. &nbsp;</p></p></p>
Estimated Equipment SubTotal*	\$15.00

Estimated Total* \$15.00 *All Totals are subject to change

Terms and Conditions

I agree to the terms and that all rates are subject to change: Yes No [View Terms](#)

I would like to receive emails for this order: Yes No

[Finalize Order](#) [Cancel Order](#)

External Users

1. Make sure your billing contact information is current using the **My Accounts** selection on the top right toolbar (see Section II).
2. Indicate your method of payment in the **Additional Billing Comments** section. Please indicate any PO numbers or Government Award numbers that should be referenced on the formal invoice.

3. Agree to the Terms of Service and select whether you would like to receive a confirmation email sent to your unity email amount account.
4. When you have provided the requested information, select **Finalize Order** at the bottom of the order summary. This should complete your order.