

How To Use the Microbial Cell Sorting Services

This user's guide was developed to guide our customers through the online submission system to request services, supplies, or schedule equipment use. While the Lab Management 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 Lab Management Application

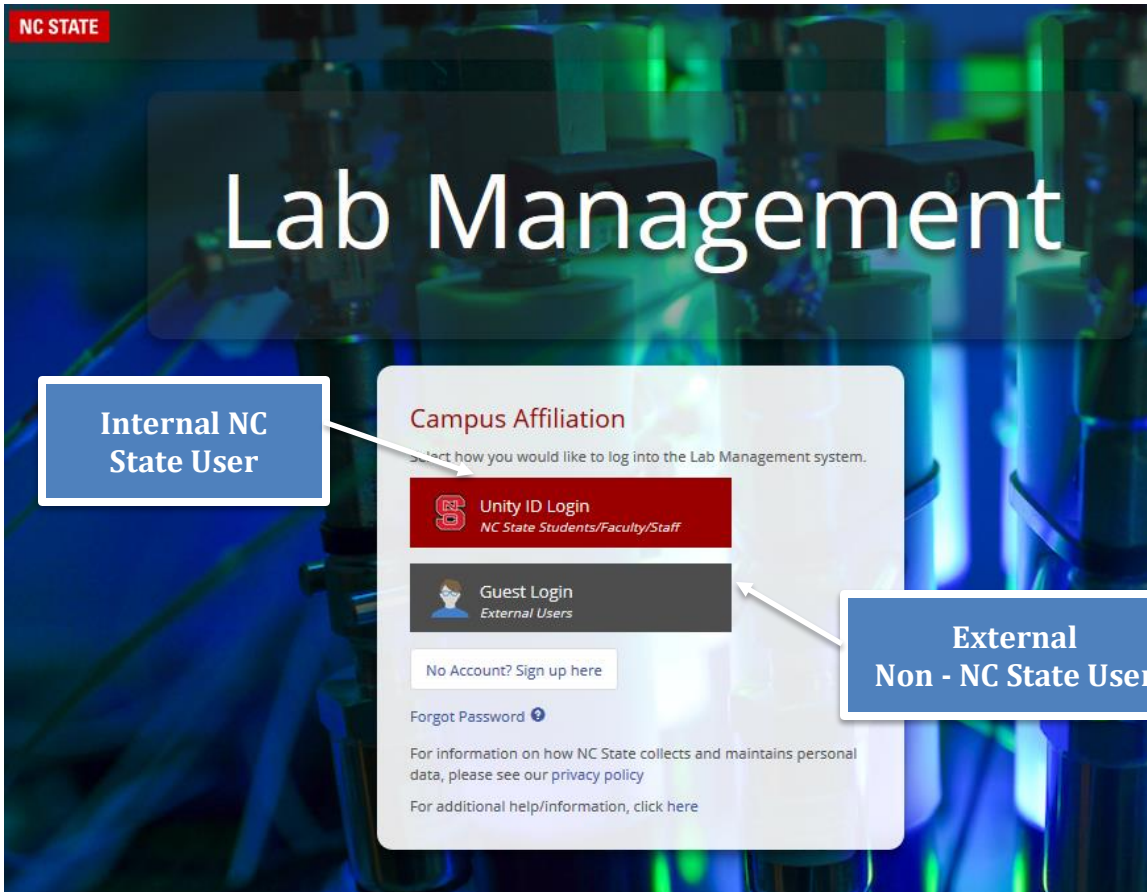
Step 1. Click on the Lab Management link on the MicroFACS website, or visit labs.ncsu.edu.

Step 2: For **internal (NC State) users**, click the red **UNITY ID LOGIN** to log in with your NCSU credentials.

For **External users**, use the **GUEST LOGIN**.

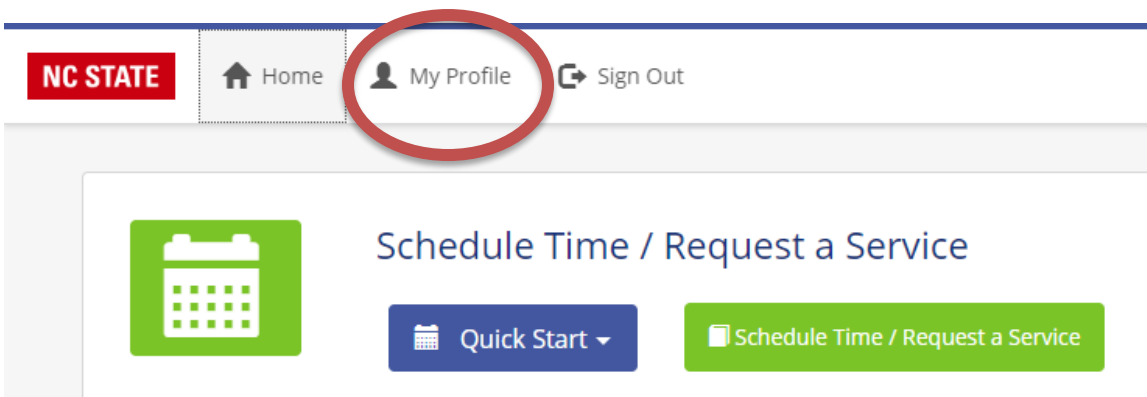
For new external users, select the 'No Account? Sign up here' link. Complete all the required fields, including billing contact information, in order to create an account.

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.

Appointments – This sections allows you see dates and times you've scheduled for instrument use.

Schedule Time / Request a Service - Use this icon to schedule equipment. Users will need to select the "Genomic Sciences Laboratory" in the next option as all participating core facilities are listed.

Training – This icon allows you to see what equipment you've been trained to use. If you were previously trained for an instrument, you will need to request training again and have it waived. No previous training events will be in the new system. Once your training event has been completed or waived, you will be able to schedule equipment use.

Agreements & Existing Agreements – Some core facilities require authorization agreements from PIs on behalf of their students. Currently, we do not require authorization agreements to be in place for students and researchers to use our services. **We do require all students or researchers to designate the PI who will be paying the bill when submitting requests.** This will happen during the submission request process.

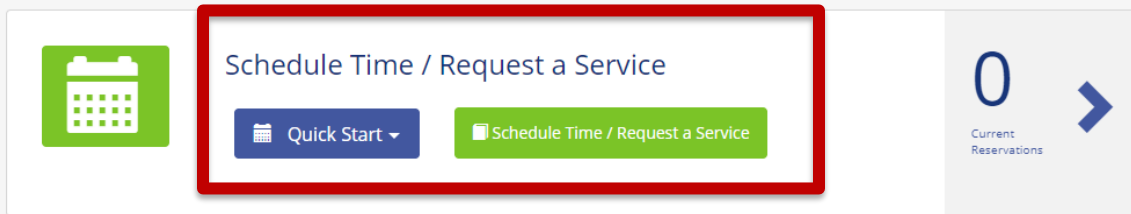
Orders – This icon allows you to view existing orders for instrument use or services in our system.

The screenshot shows the NC STATE account homepage. At the top, there is a navigation bar with the NC STATE logo and three links: Home (circled in red), My Profile, and Sign Out. Below the navigation bar is a dashboard with four main sections:

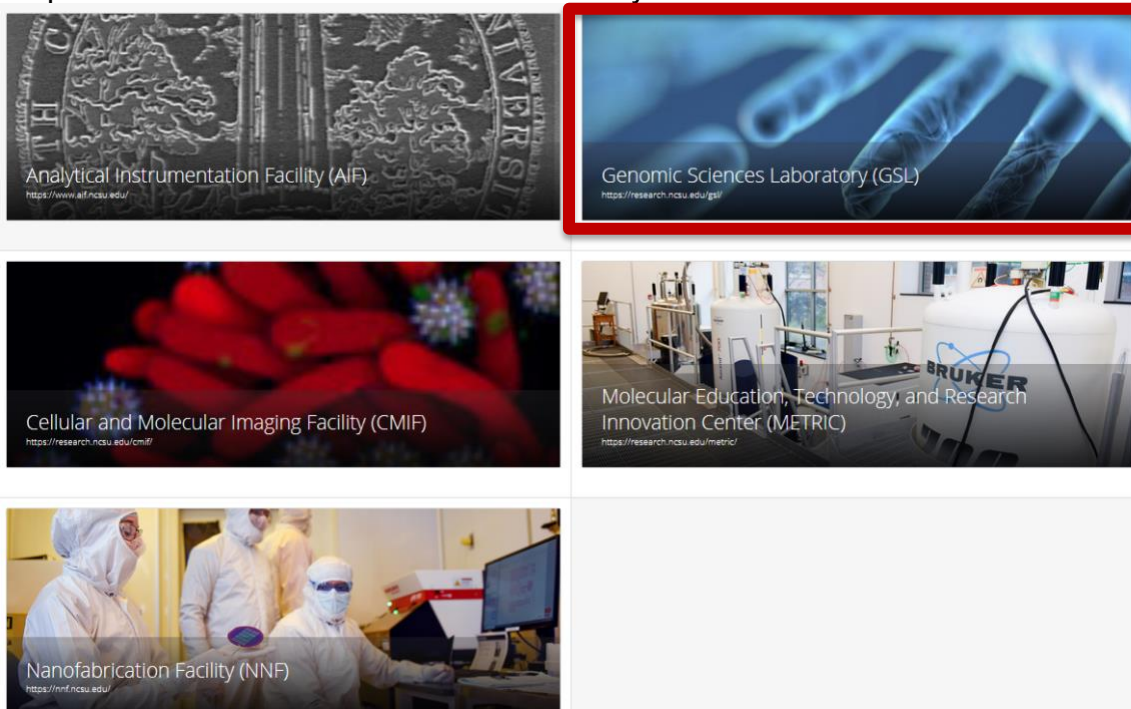
- Schedule Time / Request a Service**: Features a calendar icon, a "Quick Start" dropdown, and a "Schedule Time / Request a Service" button. On the right, it shows "0 Current Reservations" with a right-pointing arrow.
- Orders**: Features a blue folder icon and the text "View Current Orders and Billing History". On the right, it shows "5 In Progress" with a right-pointing arrow (circled in red).
- Agreements**: Features a thumbs-up icon and a "Request New Agreement" button. On the right, it shows "3 Currently Active" with a right-pointing arrow.
- Training**: Features an apple icon and the text "View Current Training / Request Training". On the right, it shows "0 Training Requests" with a right-pointing arrow.

IV. How to Schedule Equipment Use

Step 1. From your Home page, select **Schedule Time / Request a Service** OR if you have previously requested a service, select the item from the **Quick Start** menu.

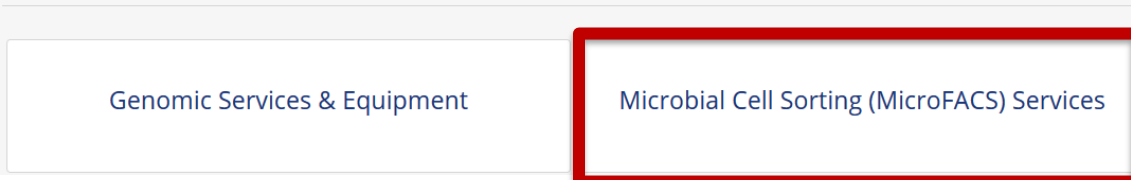


Step 2. Select "Genomic Sciences Laboratory" from the list of core facilities available.



Step 3. Select the service you would like to use.

Genomic Sciences Laboratory (GSL) / Select a Laboratory



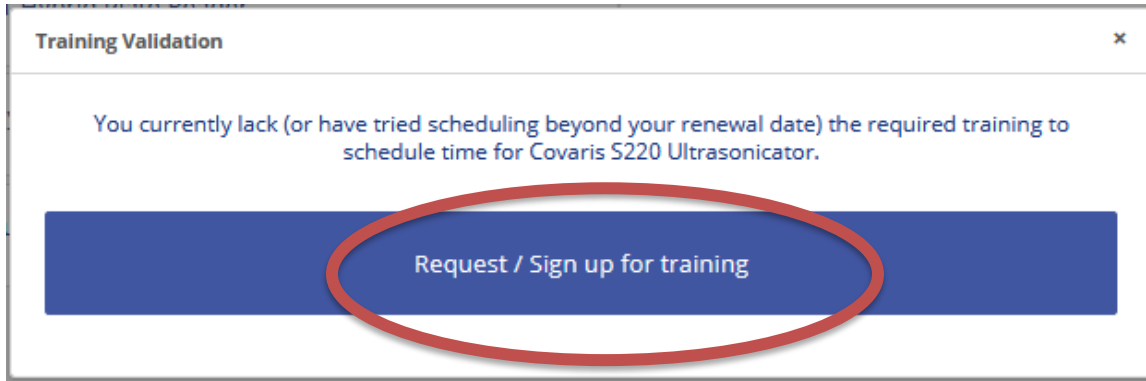
Step 4. Select the instrument you would like to use.

Note – if you were trained before the new system was put in place, no records are available. A training request can be submitted in the system and waived for users that were previously trained.


Microbial Cell Sorting (MicroFACS) Services / Select Action



Step 5. **Training** - If you are not listed as trained for this instrument in the system, you will be prompted to submit a training request. **All new users are required to complete a training event prior to use - You will not be able to schedule time on the instrument until this is completed.**



Step 6. The Lab Manager will receive an internal system notification of your training request. **The Lab Manager will schedule a training event for you that fits with our staff work schedule and you will receive a notification by email when training is complete.** We will waive users that have already been trained when we receive the request, so you do not have to retrain to use the equipment. You can keep tabs on what instruments you've been trained using the **Training** icon on your Home Page.


 [Back](#) / Request Training

Facility:

Lab, Equipment, or Training:

Don't Show Completed:

BD FACSMelody Flow Cytometer Training



Step 7. Once you are trained, select the instrument as before: **Schedule Time / Request a Service → Select Laboratory (GSL) → Microbial Cell Sorting (MicroFACS) Services → Select Equipment**. You can schedule time by dragging a window on the calendar or double clicking to the next window. Additional information about the equipment, such as the operator's manual, may be available in the top right text selection.

Click the calendar to schedule a time.


Oct 26 – Nov 1 2020



Today week day < >


| | Mo 10/26 | Tu 10/27 | We 10/28 | Th 10/29 | Fr 10/30 | Sa 10/31 | Su 11/1 |
|---------|----------|----------|----------|---|----------|----------|---------|
| all-day | | | | | | | |
| 8am | | | | | | | |
| 8:30am | | | | | | | |
| 9am | | | | | | | |
| 9:30am | | | | | | | |
| 10am | | | | | | | |
| 10:30am | | | | 10:00 am - 12:00 pm Jack: BD FACSMelody Flow Cytometer - HOURLY RESERVATIONS | | | |
| 11am | | | | | | | |
| 11:30am | | | | | | | |
| 12pm | | | | | | | |
| 12:30pm | | | | | | | |
| 1pm | | | | | | | |
| 1:30pm | | | | | | | |
| 2pm | | | | | | | |
| 2:30pm | | | | | | | |

Step 8. In the next window, you can refine your schedule times as well request Lab Manager Assistance you may need for instrument use. When you have completed your selections, click **Continue** to proceed to checkout.


Select Time

BD FACSMelody Flow Cytometer - HOURLY RESERVATIONS Use the side calendar to adjust times: 

From:  To: 

Add Consumables 

Step 2: Select any additional items that you may need for this appointment.

| Available Consumables | Added Items |
|--------------------------------|--|
| Technician Assistance (Hourly) | <div>Technician Assistance (Hourly) </div> <p>Help needed from Staff:</p> <div><input type="text"/></div> |

Note: If you receive an error message after clicking on Continue, you are likely in conflict with the scheduling rules for this instrument. See below for the Reservable Rules on the Microbial Cell Sorting instruments:

BD FACSMelody Flow Cytometer

HOURLY RESERVATIONS – Scheduling available from 9:00 AM to 4:00 PM Monday – Friday (except Holidays). There are no minimum or maximum scheduling constraints (per day). Instrument charges are hourly.

DAILY RESERVATIONS – Scheduling available from 9:00 AM to 4:00 PM Monday – Friday (except Holidays). There are no minimum or maximum scheduling constraints (per day). Instrument charges are hourly.

Note: If you would like us to turn on the instrument to chill down, please contact us at xxx@gmail.com several hours ahead of your appointment time.

Step 9. Fill out billing information, agree to terms and conditions, and select Finalize Order. More information on how to fill out your billing information, see Section VII (Completing Your Order).

VII. Completing Your Order (Billing)

When you have completed your selection for a GSL Service or Equipment scheduling, 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)

Step 1. **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**.

Step 2. Enter the internal account to be charged (**Project ID**) ...

- OR -

Enter other billing arrangements in the **Additional Billing Comments** field.

Step 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.

Step 4. When you have provided the requested information, select **Finalize Order** at the bottom of the order summary. This should complete your order.

Step 3: Select the Facility Agreement or Project ID to be used by billing.

If you do not currently have an agreement, please type in the project you would like to charge.

| | | |
|------------|--------|----------------------|
| Project ID | 221700 | <input type="text"/> |
|------------|--------|----------------------|

Primary Investigator: Ron Reed, nobody@ncsu.edu.invalid Add/Change Primary Investigator

Additional Billing Comments

Please place any further comments regarding billing here:

Step 4: Review Order and Accept Terms

Equipment / Service

| Order Item | Estimated Sub Total* | Notes |
|--|----------------------|-------|
| BD FACSMelody Flow Cytometer - HOURLY RESERVATIONS | \$125.00 | |

Estimated Total* \$125.00 *All Totals are subject to change

I agree to the [Terms & Conditions](#) and that all rates are subject to change:

External Users

- Step 1. Make sure your billing contact information is current using the **My Accounts** selection on the top right toolbar (see Section II).
- Step 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.
- Step 3. Agree to the Terms of Service and select whether you would like to receive a confirmation email sent to your unity email account.
- Step 4. When you have provided the requested information, select **Finalize Order** at the bottom of the order summary. This should complete your order.