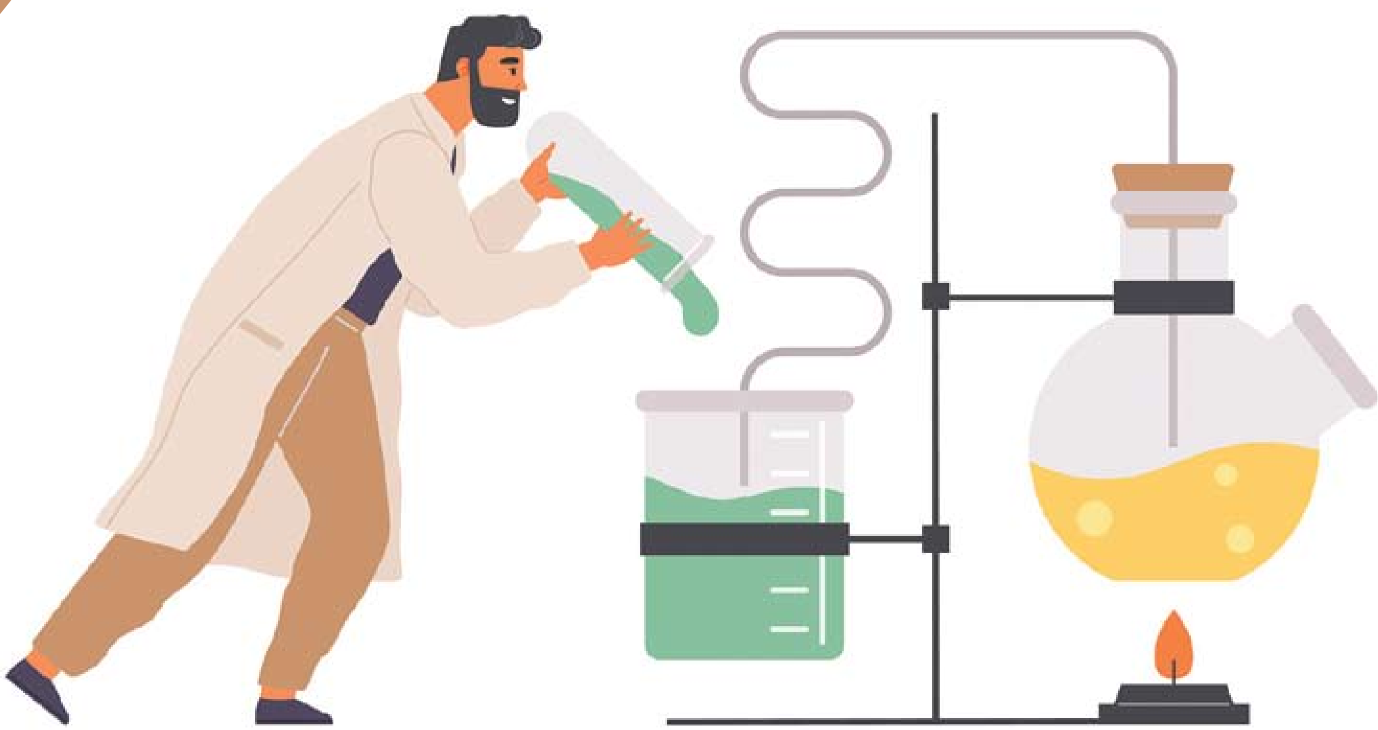
AC Lab System

Complete Guide 2025

DELIVER QUALITY RESEARCH LAB SERVICE



Preface

Welcome to the latest version of the ACLS guide, another milestone achieved through the dedication of the innovative team led by Dong Zheng.

The new features in this version include the following highlights:

- UWA PET/CT/MRI research facility special edition to cover the research project, principal investigator, leading clinician, ethics, modality, study population, patient, scanning modality, email and mobile messaging, special booking calendar, DICOM, etc.
- Special modifications for UWA, AARHUS, ANFF UQ, MCN and UOW.
- Broadcast message: added support attachment.
- WHS module: improved the WHS report.
- Loan resource module: improved the edition to meet UNSW requirements to manage over 1000 loan resources.
- Supervisor module: added supervisor sign in option so supervisor could check his/her research group activities and reports.
- Enterprise service framework and deployment including the following enterprise modules:
    - SSO authentication.
    - Uni-wide resource catalogue.
    - WHS module to process the WHS document approval and user declaration.
    - Uni-wide business intelligence.
    - Uni-wide user registration.

As an existing user of ACLS for about fifteen years, the Engineering Analytical Facility (EAF) in The University of Sydney has witnessed the continuous evolution, improvement, and optimization of this system. Always with a focus on our clients' needs in mind, ACLS has consistently delivered timely solutions for our ever-expanding scope of services. The flexibility of the software modules caters to our day-to-day needs and ensures future proofing for the expansion of EAF's service capabilities.

We encourage you to provide your feedback, suggestions, and comments, as we have done in the past and will continue to do so in the future.

Dr. Jeffrey Shi

FRACI CChem FIChemE CEng

Manager, Technical Support Services/Engineering Team Central Operation Service

The University of Sydney

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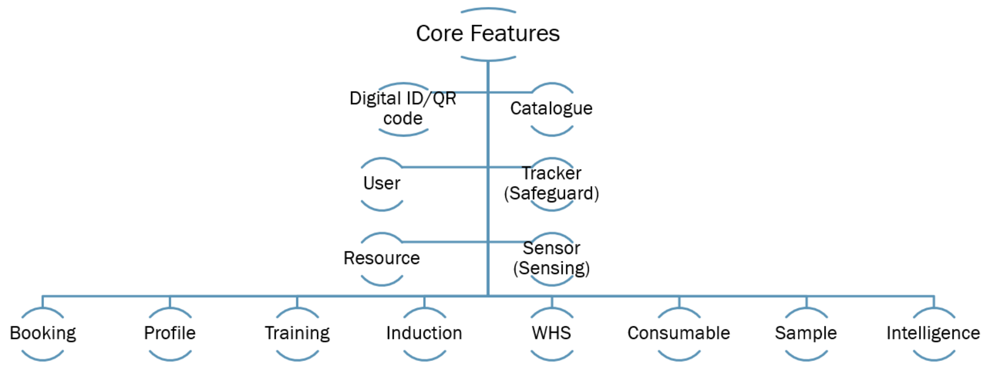
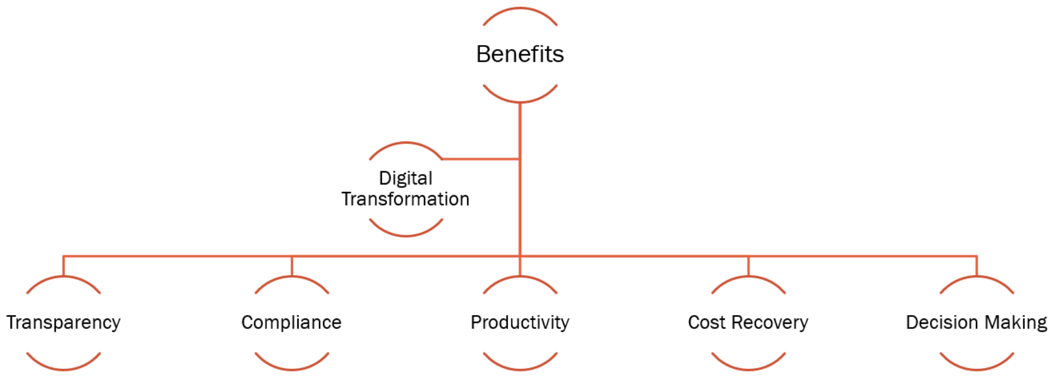
1 Introduction

AC Lab System (in short, ACLS) is a web-based, lab-integrated, resource and information management system that has been developed and supported for over 15 years. ACLS significantly enhances institute productivity and aids in a digital transformation in alignment with university strategies.





ACLS is comprised of numerous feature rich modules. These include:

- The ability to make bookings of various categories and options. For example, the division of bookings into categories such as operation, user, training, commercial, and service. Another example is the ability to indicate whether a booking is staff assisted or unassisted.
- An instrument training certification system that restricts instrument usage to those who have sufficient training
- A streamlined setup for lab induction processes
- Various data analytics tools
- QR code shortcuts for instrument bookings
- The tracking of consumable items and consumable item orders
- The tracking of chemical sampling jobs
- The consolidation of scholarly publications
- An item loan tracking system
- A custom survey creator
- Full support ticketing

ACLS is modular in design, making it flexible and customisable. Users can access a wide range of resource and instrument information, allowing them to make informed laboratory decisions.

ACLS access can be authenticated either through a local authentication mechanism, or through an active directory (LDAP), or through AAF, or through Azure SAML authentication.

As a user of ACLS you will be able to utilize:

- Online user registration and activation
- Setup of an online registration pathway
- Billing options based on project-based, account-based, or resource-based schemes
- The option to collect booking data or usage data through ACLS tracker, for the purposes of resource management and data processing
- Usage of multiple booking tools and multiple account/project options
- Booking confirmation systems and exportable calendar booking reminders that are compatible with Outlook, Mac mail, Thunderbird, and various other local calendar programs.
- Dynamic booking confirmation emails with an activation URL, 24 hours before the booking time
- Linked resource calendars
- Multiple group sample tracking and reporting
- Email message broadcasts targeting user groups, staff groups, certificate groups, and supervisor groups
- Data reports and invoices (supporting batch invoices and individually-run invoices)
- Incident report and tracking system
- Training and support ticketing system
- Survey creator
- Publication analyser
- ACLS iPhone and Android app
- Resource catalogue
- Laboratory document access and administration
- Video access and administration
- Customised induction process and full status reports
- Consumable library, order and tracking
- QR code implementation so smart phones can be used to scan, access information, login to make bookings and record consumable usages
- Loan item management, borrow, return, overdue and book

1.1 Version Series

The latest web version is SQL 8.1.x

1.2 Internet Browsers

ACLS is tested and certified with the following major Internet browsers:

Edge	Firefox	Safari	Chrome

1.3 Customer Support

Should you have any feedback or require any support or assistance in running and operating the ACLS, please contact us at *support@unilab.com.au*.

2 System Installation

ACLS functionality is spread across multiple applications:

- Web portal and web application (mobile browser friendly), comprised of HTML pages, javascript, ReactJS, PHP, and more
- ACLS tracker application for desktop
- ACLS sensor application for desktop.
- Smartphone app for iPhone and Android

2.1 System Requirements

2.1.1 Server Operating System

Operating System	• Windows Server 2019 standard/enterprise (64 bit) • Windows Server 2022 standard/enterprise (64 bit)

2.2 Server Installation

The installation order for an ACLS server instance is:

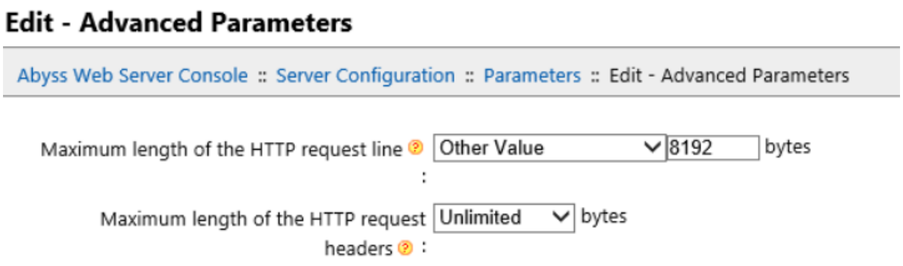
- Web server installation
- PHP engine installation
- PostgreSQL engine installation
- System server installation, consisting of:
  - Email server
  - Mailer server
  - Mobile text message server (optional)

2.2.1 Web Engine

For the ACLS web application service, Abyss Webserver X1 is required.
If the ACLS Tracker app is in use, then Abyss Webserver X2 is required.

2.2.2 Troubleshooting: URL is too long

For system administrator only. There are occasions where users might encounter a “URL too long” error message when accessing ACLS. This can be resolved by making changes to the Abyss web server settings. Navigate to the server configuration parameters page and set the maximum length of the HTTP request line to 8192 bytes. Also, set the maximum length of the HTTP request headers to unlimited bytes.

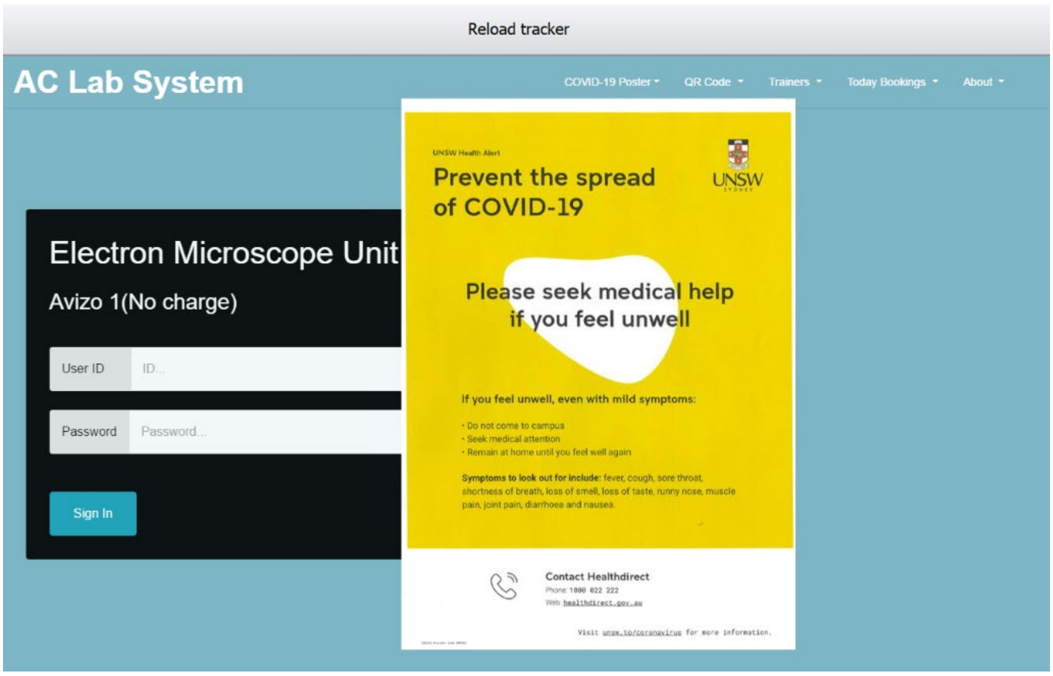


2.2.3 *Database Engine*

ACLS runs on PostgreSQL 11 and above.

2.3 ACLS Tracker

The ACLS Tracker application is intended for installation on resource computers. The tracker is built for Windows OS and Linux distributions (officially supporting Ubuntu and CentOS).



ACLS Tracker records instrument usage by tracking user logins. Optionally, you can require the user to make a booking before using the app.
By default, ACLS shows the most recent user of the instrument.

What is booking first policy?

Somewhat occasionally, students and researchers might operate research equipment without booking first. Now you can enforce the booking first policy with the tracker app, whereupon usage is only granted if the user has an appropriate booking.
By doing so, it will minimize the admin workload needed to manage unrecorded sessions and the corresponding loss of revenue.
For example, James books the equipment from 10am to 11am, meaning he can only login to the resource between 10am and 11am.

Alternatively, James can also scan the equipment QR code displayed on the tracker app to make a booking onsite, so that he can immediately utilize the resource.

Admin can turn on the booking first policy on tracker setting page of resource profile. By default, the booking first policy is disabled.

The installation and operation of ACLS Tracker refers to **Appendix I – ACLS Python Tracker**

2.4 Cyber security protection - XSS (Cross Site Scripting) vulnerability

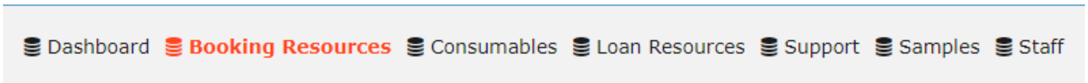
XSS exploit protection scripts are implemented to protect against XSS attacks on all forms in ACLS.

3 Getting Started

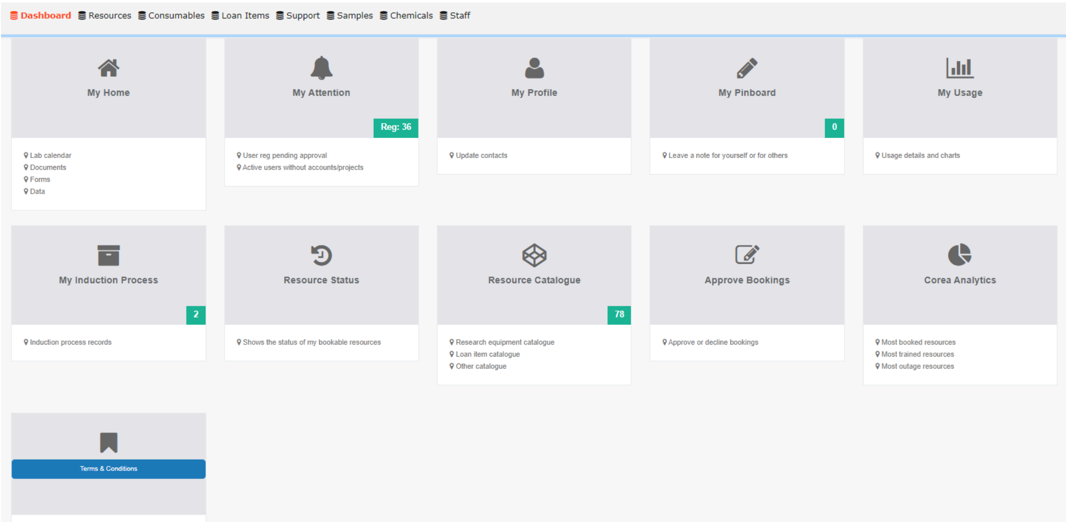
Before you start running ACLS, it is important to understand each of the functions and features.

3.1 Navigating ACLS

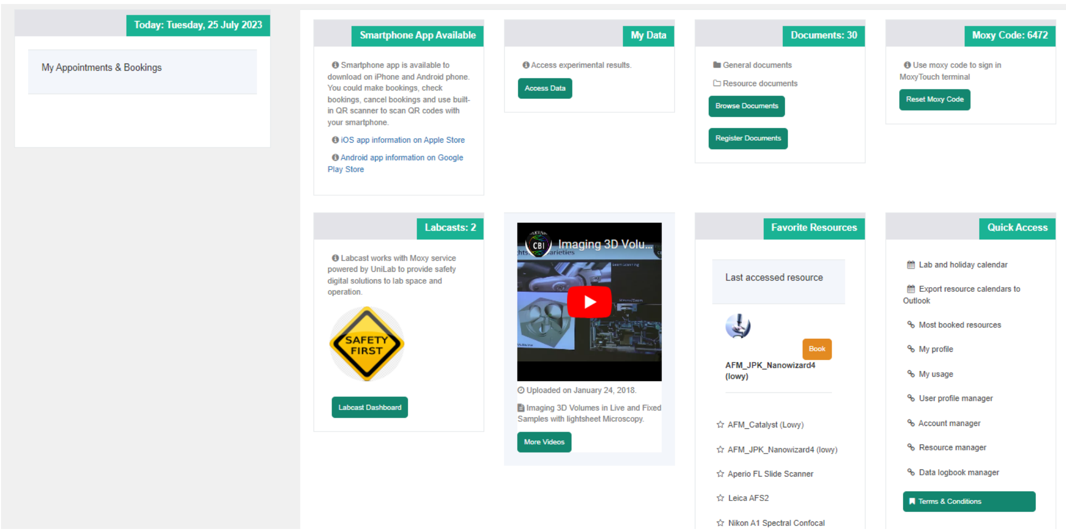
You can navigate ACLS through two interactive menus: the upper horizontal menu for major function access, and the left vertical menu for individual function access. The displayed menus are determined by the user's access group.



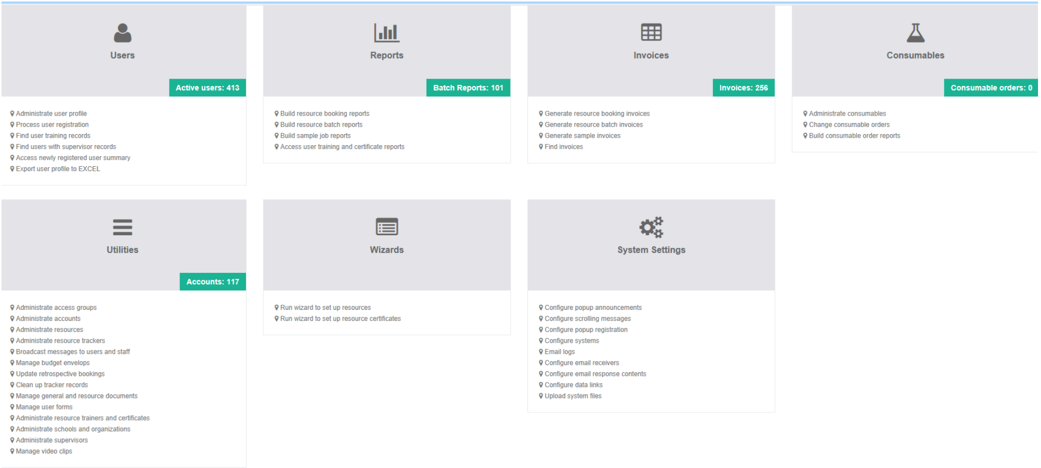
- Dashboard tab



- Resources tab



- Staff tab



3.2 Selecting the Business Model

Before setting up ACLS, you must consider which business model that your laboratory will use for cost recovery. The business model determines how the rates will be applied to users' bookings or usages i.e how to establish the cost recovery of resource usages.

You can only select one business model per ACLS instance. Please refer to the ***Configuring ACLS*** chapter for further information.

Select one of the following business models:

3.2.1 Project-Based (Medical Labs)

The project-based model establishes a relationship between users and billing projects. The relationship includes supervisors, researchers, accounts, account contribution rate, charging rates and contents. The final billing process is tied to the user accounts. For further information, refer to the ***Operating ACLS*** chapter.

3.2.2 *Account-Based (commonly used)*

The account-based model calculates the rates according to user accounts. This includes the account name, account type (internal or external) and the charging rate (if account-based policy is adopted). For further information, refer to the ***Operating ACLS*** chapter.

3.2.3 *Resource (Instrument)-Based (commonly used)*

The resource-based model ties the billing to a resource charge rate, rather than the account rate or project rate.

For further information, refer to the ***Operating ACLS*** chapter.

3.3 Resource Multi-Dimension Charging Model

The implemented multi-dimension usage covers 3 dimensions:

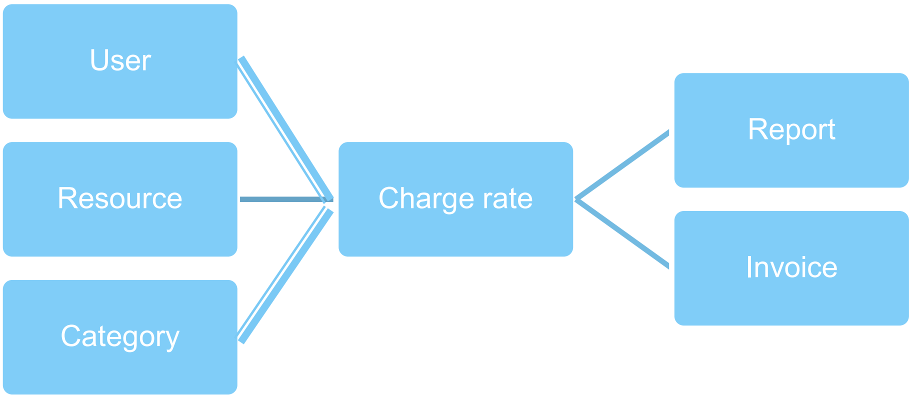
- Resource
- Charge category
- User

First, define the charge rate with resource vs charge category.
Second, define the matrix of user vs (resource vs category).
A charge rate table example:

Resource	Charge Category			
	Student	Academic	Commercial	Special
TEM CM200	$10/hour	$15/hour	$50/hour	$1/hour
SEM 450	$8/hour	$10/hour	$50/hour	$1/hour
SEM 230	$8/hour	$10/hour	$50/hour	$1/hour
Zeiss Lightsheet	$20/hour	$30/hour	$100/hour	$5/hour

User	Resource	Charge Category			
		Student	Academic	Commercial	Special
David Cook	TEM CM200	$10/hour			
	SEM 450	$8/hour			
	SEM 230	$8/hour			
	Zeiss Lightsheet	$20/hour			
Owen Crowe	TEM CM200			$50/hour	
	SEM 450				$1/hour
	SEM 230			$50/hour	
	Zeiss Lightsheet			$100/hour	

3.3.1 Indicative diagram for multi-charge rate method



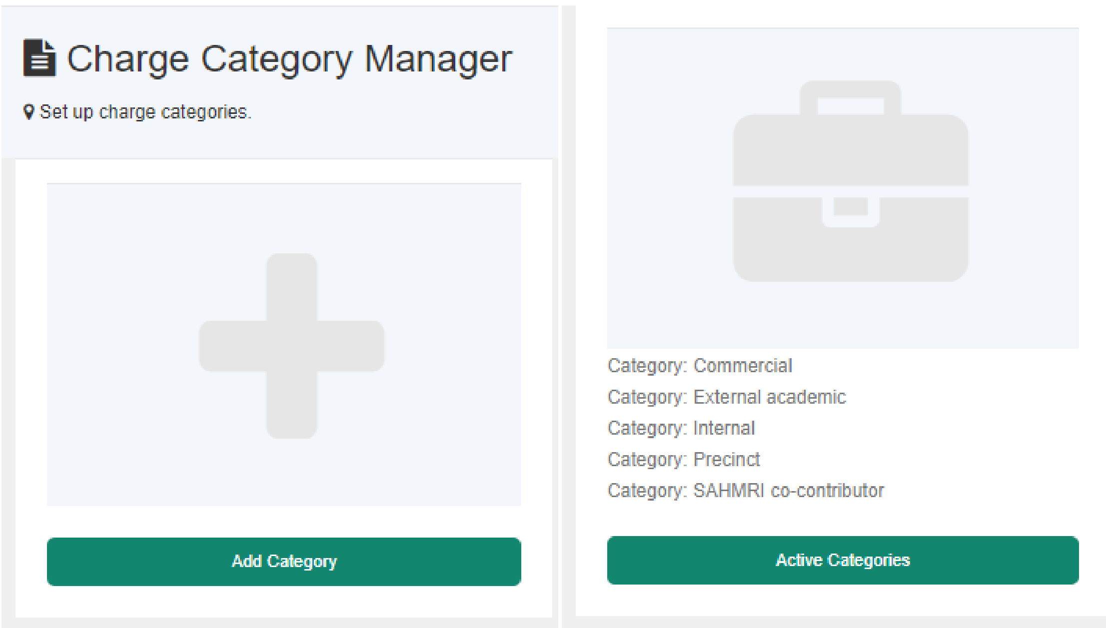
3.3.2 Enabling the multi-charge rate method

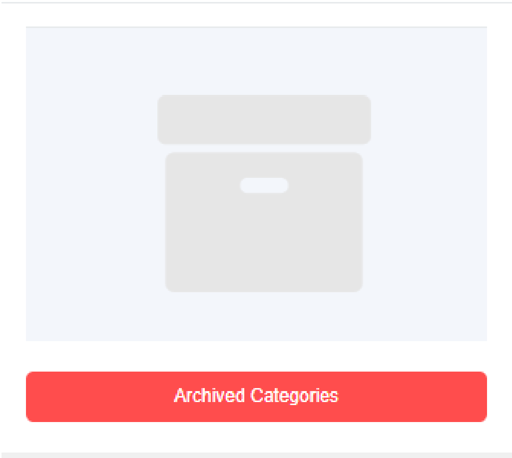
Only a system administrator can enable this method.

Go to ***System Setting -> Configure System -> Parameter -> EnableChargeCategoryManager***, tick the checkbox and accept.

3.3.3 Setting up charge category

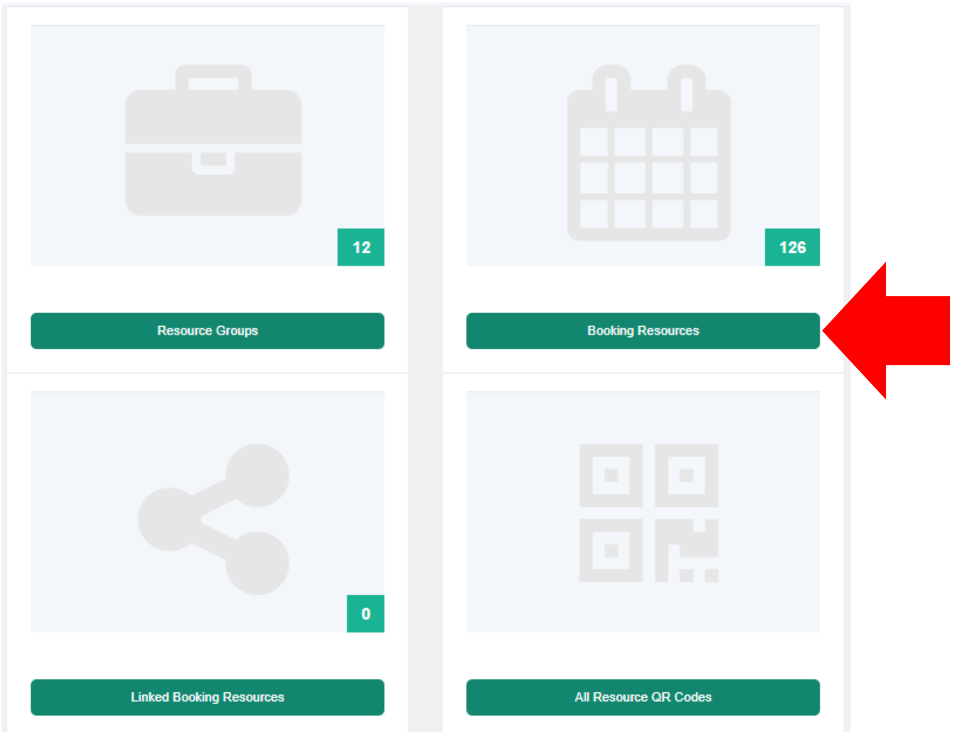
Go to ***Staff tab -> Utility -> Charge Category Manager*** to set it up.



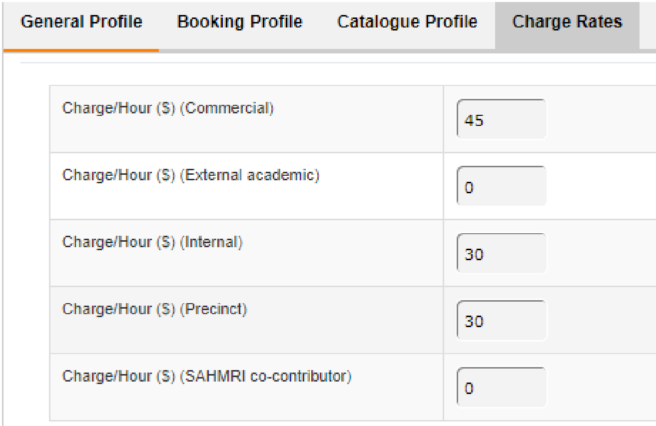


3.3.4 upsetting up charge rate with resource vs charge category

Go to ***Staff tab -> Utility -> Resource Manager -> Booking Resources*** and edit the resource profile.

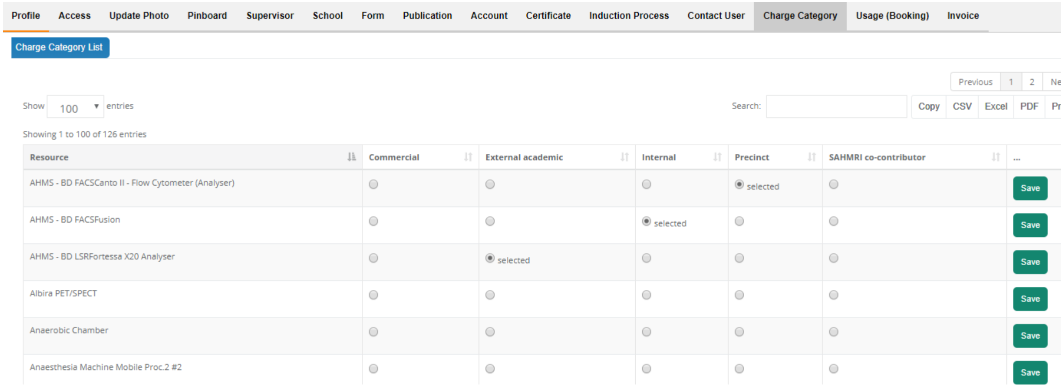


On ***Resource Manager -> Resource Profile -> Charge Rates***, enter the charge rate accordingly.

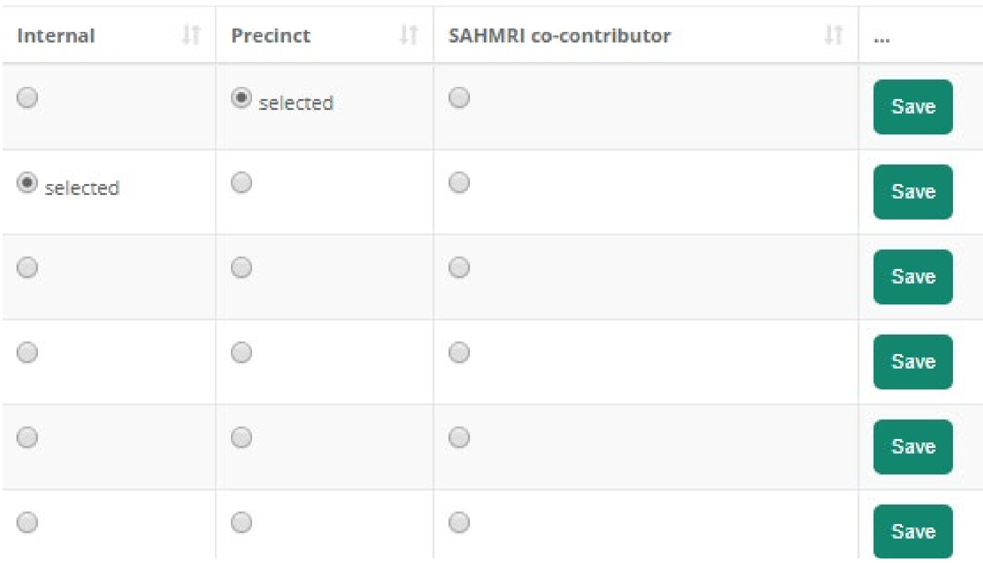


3.3.5 Setting up a charge method on a user's profile

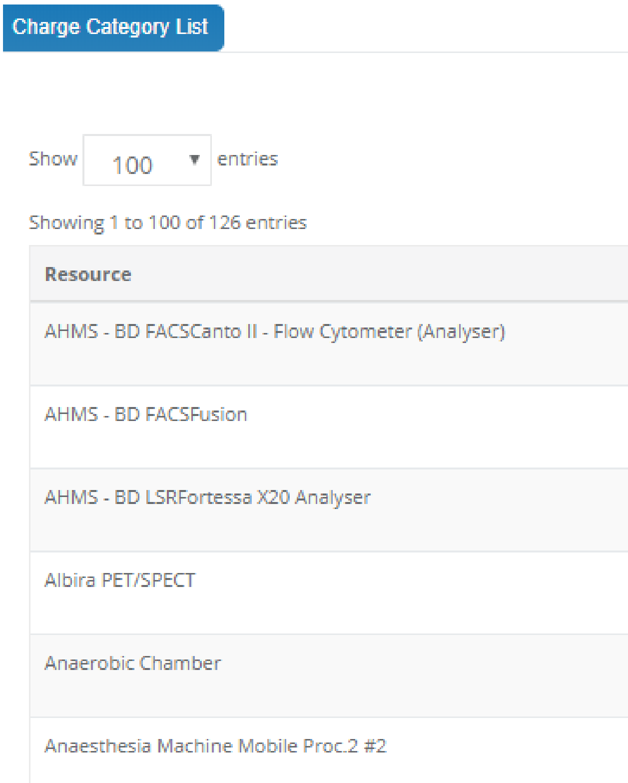
Go to ***Staff tab -> User Profile -> User Profile Manager***, find and edit ***user profile -> charge category*** tab.



Select charge category for the resource and save. Note that this may be a time consuming job if you have a large number of resources and users.



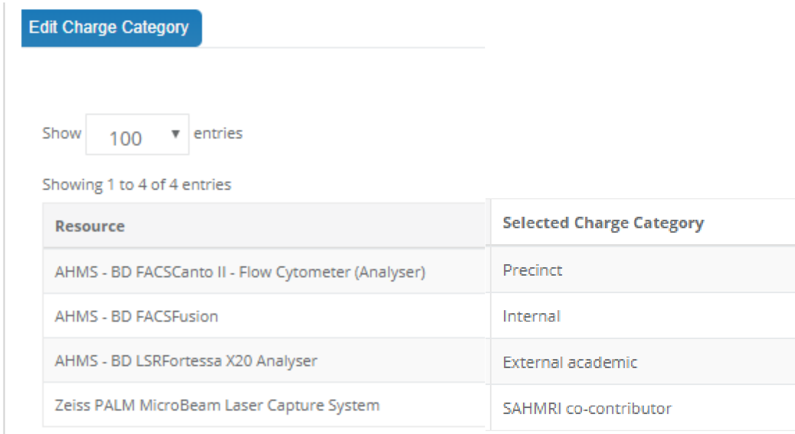
There are two functions on this page: listing the user's selected resource/category, and functionality to edit/select resource vs category


Charge Category List

Show 100 entries

Showing 1 to 100 of 126 entries

Resource
AHMS - BD FACSCanto II - Flow Cytometer (Analyser)
AHMS - BD FACSFusion
AHMS - BD LSRFortessa X20 Analyser
Albira PET/SPECT
Anaerobic Chamber
Anaesthesia Machine Mobile Proc.2 #2


Edit Charge Category

Show 100 entries

Showing 1 to 4 of 4 entries

Resource	Selected Charge Category
AHMS - BD FACSCanto II - Flow Cytometer (Analyser)	Precinct
AHMS - BD FACSFusion	Internal
AHMS - BD LSRFortessa X20 Analyser	External academic
Zeiss PALM MicroBeam Laser Capture System	SAHMRI co-contributor

3.3.6 About the multi-dimension charge method for reports

ACLS calculates the multi-dimension charge for all reports, including the batch report.

3.3.7 About the multi-dimension charge method for invoices

ACLS calculates the multi-dimension charge for individual invoice and batch reports.

MARK WAINWRIGHT ANALYTICAL CENTRE: BIOANALYTICAL MASS SPECTROMETRY FACILITY

STATEMENT

March 2020

SUPERVISOR: Rebecca Robker

TEL:
EMAIL: rebecca.robker@adelaide.edu.au

DATE: April 11, 2020

DETAILS:

This Statement covers the work by your groups in March 2020.

Details of Bookings:

User Name	Resource	Booking Start Time	Booking End Time	Account	Booked Hours
Macarena Gonzalez	AHMS - BD FACSCanto II - Flow Cytometer (Analyser)	30/03/2020 10:00	30/03/2020 11:00	2000003746098_Rebecca Robker	1.00
Takashi Umehara	AHMS - BD FACSCanto II - Flow Cytometer (Analyser)	20/03/2020 13:00	20/03/2020 13:45	2000003746098_Rebecca Robker	0.75

Summary of Bookings:

Resource	User Name	Account	Resource Charge/Hour	Booked Hours	Charges
AHMS - BD FACSCanto II - Flow Cytometer (Analyser)	Takashi Umehara	2000003746098_Rebecca Robker	$45.00	0.75	$33.75
AHMS - BD FACSCanto II - Flow Cytometer (Analyser)	Macarena Gonzalez	2000003746098_Rebecca Robker	$0.00	1.00	$0.00
Sub-Total				1.75	$33.75
TOTAL				1.75	$33.75

An official invoice is required for billing. Details are as follows:

Account	Charges
2000003746098_Rebecca Robker	$33.75

Invoice No: 00000009

3.3.8 Resource vs User Category-Based (ANFF MCN Customization)

A special modification for ANFF MCN has been implemented, branching off from the same method. Please refer to ***Appendix A*** for details.

3.4 Authentication Access

The access policy for each function as follows:

3.4.1 Dashboard

Authentication Groups	Dashboard/My Home
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Dashboard/My Attention
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Dashboard/My Profile
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Dashboard/My Pinboard
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Dashboard/My Usage
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Limited Access
Standard users	Limited Access

Authentication Groups	Dashboard/Resource Status
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Limited Access
Standard users	Limited Access

Authentication Groups	Dashboard/Research Catalogue
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Dashboard/Corea Analytics
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Dashboard/Video Clips
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

3.4.2 Booking Resources

Authentication Groups	Booking Resources/Resource Catalogue
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Booking Resources/Resource Catalogue Public URL
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	No Access
Equipment Supervisor	No Access
General Staff	No Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Booking Resources/Today
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Booking Resources/Moxy Code
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Booking Resources/Labcast
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	No Access
Equipment Supervisor	No Access
General Staff	No Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Booking Resources/Favorite Resources
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Booking Resources/Quick Access
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Booking Resources/My Calendar
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Limited Access, No Staff and Service calendars
Standard users	Limited Access, No Staff and Service calendars

Authentication Groups	Booking Resources/Outlook Calendar
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Limited Access
Standard users	limited Access

Authentication Groups	Booking Resources/Lab and Holiday Calendar
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Info only
Equipment Supervisor	Info only
General Staff	Info only
User Supervisors	Info only
Standard users	Info only

Authentication Groups	Booking Resources/Resource Trainers
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Booking Resources/Resource Timeline Calendars
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Certified resource calendars only
Standard users	Certified resource calendars only

Authentication Groups	Booking Resources/My Bookable Resources
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Certified resource calendars only
Standard users	Certified resource calendars only

Authentication Groups	Booking Resources/Resource Dropdown List
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Certified resource calendars only
User Supervisors	Certified resource calendars only
Standard users	Certified resource calendars only

Authentication Groups	Booking Resources/Operation Calendar (Unassisted)
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Booking Resources/User Calendar (Assisted)
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Booking Resources/Training Calendar (Assisted)
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Booking Resources/Group Calendar (Assisted)
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Booking Resources/Commercial Calendar
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Booking Resources/Service Calendar
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	No Access
Standard users	No Access

3.4.3 Consumables

Authentication Groups	Consumables/Order Consumables
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Consumables/Register New Consumables
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	No Access
Equipment Supervisor	No Access
General Staff	No Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Consumables/Search and Edit Consumables
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	No Access
Equipment Supervisor	No Access
General Staff	No Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Consumables/Order Consumables for User
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Consumables/Change Consumable Orders
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Consumables/ Consumable Order Report
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	No Access
Equipment Supervisor	No Access
General Staff	No Access
User Supervisors	No Access
Standard users	No Access

3.4.4 Loan Resources

Authentication Groups	Loan Resources /My Loaned Resources
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Loan Resources /Loaned Resource Listing
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Loan Resources /Loan Resource Table
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Limited Access
Standard users	Limited Access

3.4.5 Samples

Authentication Groups	Samples/Define Operation Groups
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	No Access
Equipment Supervisor	No Access
General Staff	No Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Samples/Sample Jobs
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	No Access
Standard users	No Access

3.4.6 Publications

Authentication Groups	Publications/Search
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Full Access
Standard users	Full Access

Authentication Groups	Samples/Bar Charts
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Samples/Pie Charts
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	No Access
Standard users	No Access

3.4.7 Support

Authentication Groups	Support
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Full Access
General Staff	Full Access
User Supervisors	Limited Access
Standard users	Limited Access

3.4.8 Staff

Authentication Groups	Staff/User Profile
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Limited Access
General Staff	Limited Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Staff/Report Manager
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Limited Access
General Staff	Limited Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Staff/Invoice Manager
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Limited Access
General Staff	Limited Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Staff/Utility Manager
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	Full Access
Equipment Supervisor	Limited Access
General Staff	Limited Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Staff/System Wizards
System Administrators	Full Access
Administration Staff	Full Access
Management Staff	No Access
Equipment Supervisor	No Access
General Staff	No Access
User Supervisors	No Access
Standard users	No Access

Authentication Groups	Staff/System Settings
System Administrators	Full Access
Administration Staff	Limited Access
Management Staff	No Access
Equipment Supervisor	No Access
General Staff	No Access
User Supervisors	No Access
Standard users	No Access

4 Registration

4.1 Select Login Name

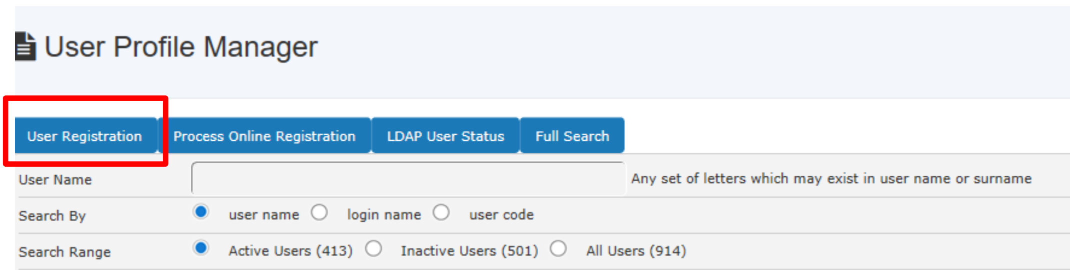
ACLS provides these options for logging in:

- The user's email address, e.g. xx@unsw.edu.au
- A custom login name, e.g. abcd
- Integration with the University or Organization’s username and password system, compatible with:
    - LDAP login systems
    - AAF login systems
    - SSO login systems, including Microsoft Entra ID (Azure Active Directory) and Okta
    - AAF login systems
    - For more information, refer to ***Appendix M and Appendix L***

The ACLS System Administrator can configure login name options through ***Configure System***.

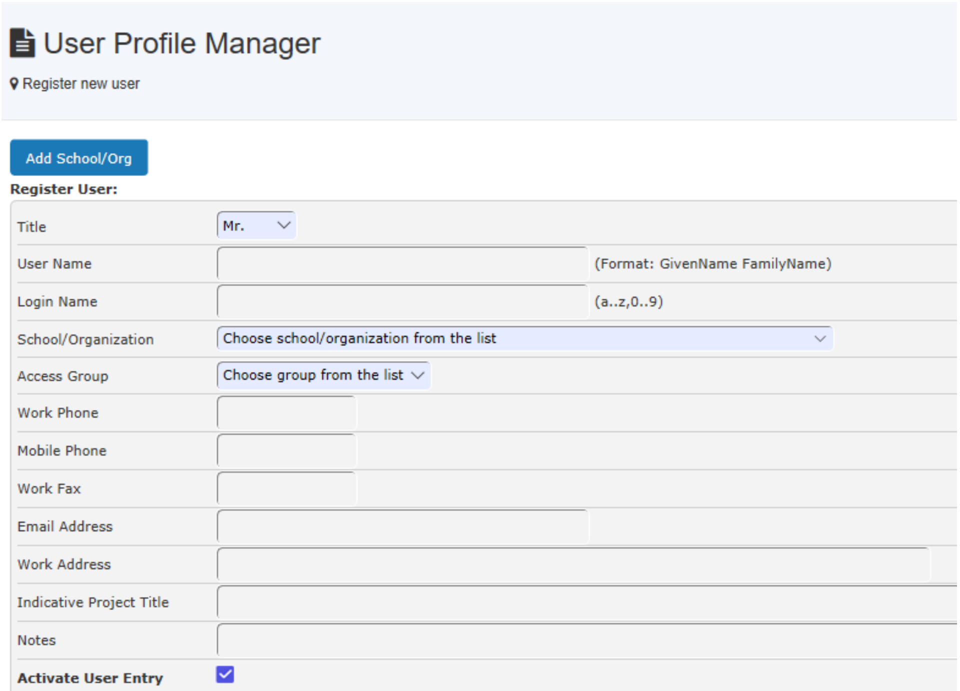
4.2 Manual User Registration

Manual system registration can be done by system administrators and administrative staff. This is done through the ***User Profile Manager*.**



Check the **Activate User Entry** box to grant the user full permission to access the system. All staff members are able to use this function.

Once all user registration details have been completed, click **Accept** to save the user’s information.



Following a user's registration orreactivation, select the **Send Confirmation Email** option to send a a confirmation email notice to the user.

Only administrative staff or system administrators can register new users. User photos arean optional upload. Depending on the configuration settings at **Configure System,** a user's access to ACLS may be deactivated due to a missing photo. For further information on uploading a photo, refer to the ***FAQ*** chapter.

Even when the user's access to ACLS is activated from following the above steps, you still need to complete the next step to grant the user access to ACLS:

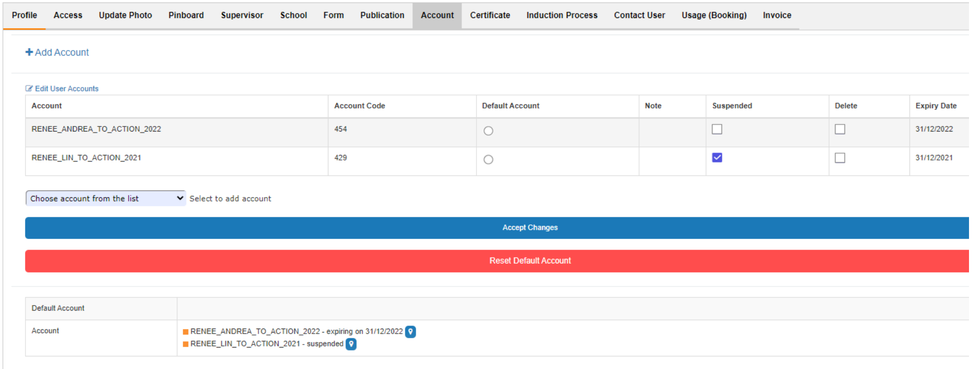
4.2.1 Project-Based Registration

Following the registration of a user, switch to the ***Project Manager*** to add the user to an active project. Users without a linked project are unable to make any bookings or access the ACLS tracker application on the resource computer.

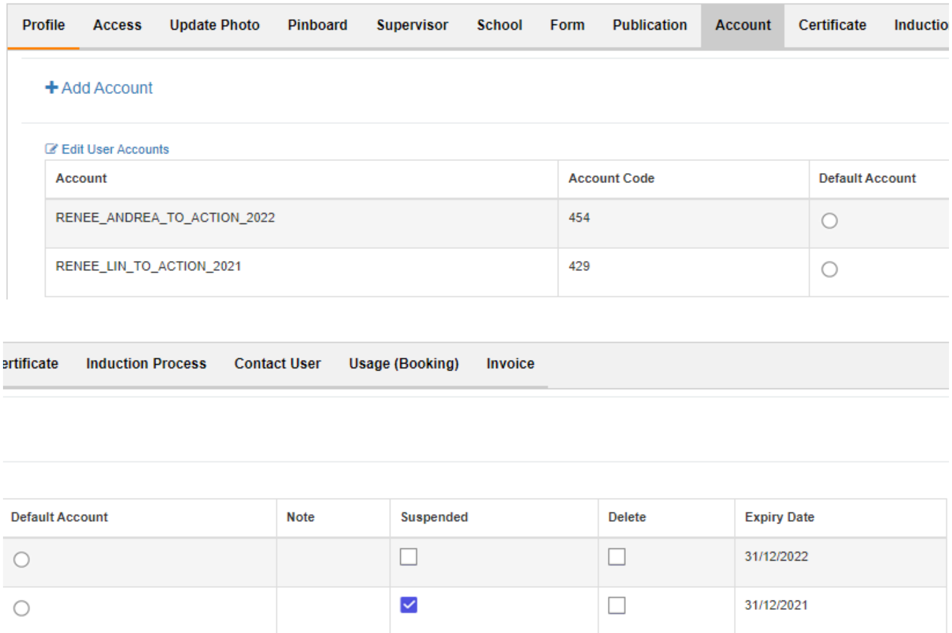
4.2.2 Account/Resource-Based Registration

The account/resource-based registration option is similar to the project-based user registration. The difference is that you are required to establish a link to one or more accounts on the registration page. Note that in this section, an "Account" is a billing account, not a user account.

Following the completion of user registration, go to ***Account*** tab, ***Edit User Accounts*** to make an account selection.



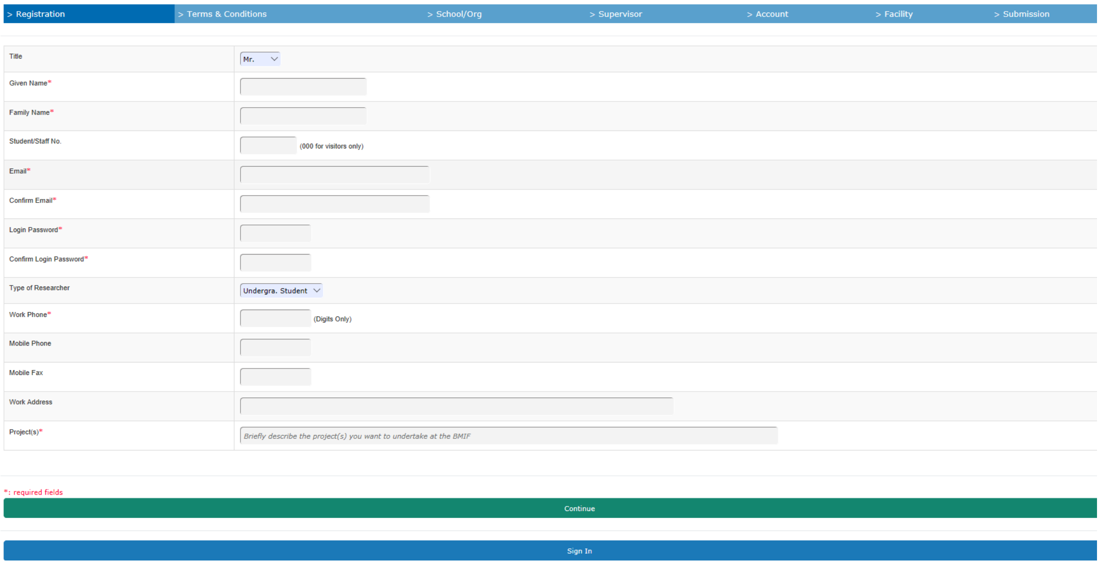
If you select the **Suspended** option, the user account will be disabled. If you select the **Delete** option the user account may be removed, depending on whether the user uses the account for bookings or logs.



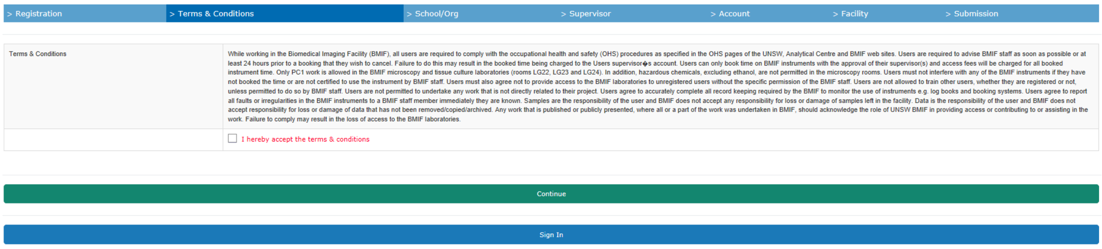
4.3 Register Users Online

ACLS online registration is a process divided into the following stages:

1. User data entry

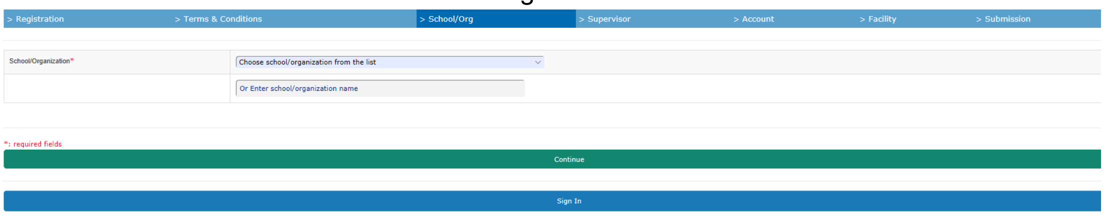


2. Terms and Conditions Compliance



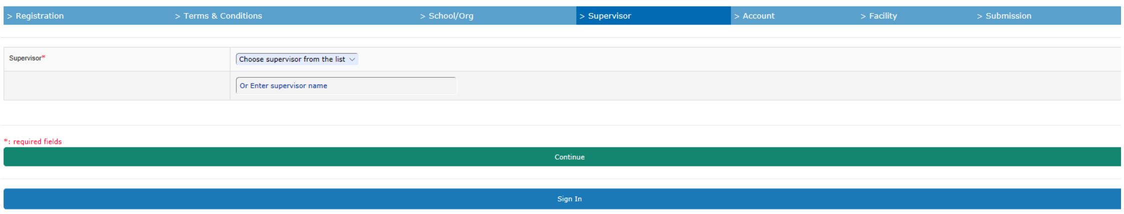
3. School/Org selection/entry

You can either select or enter a school or organization name.

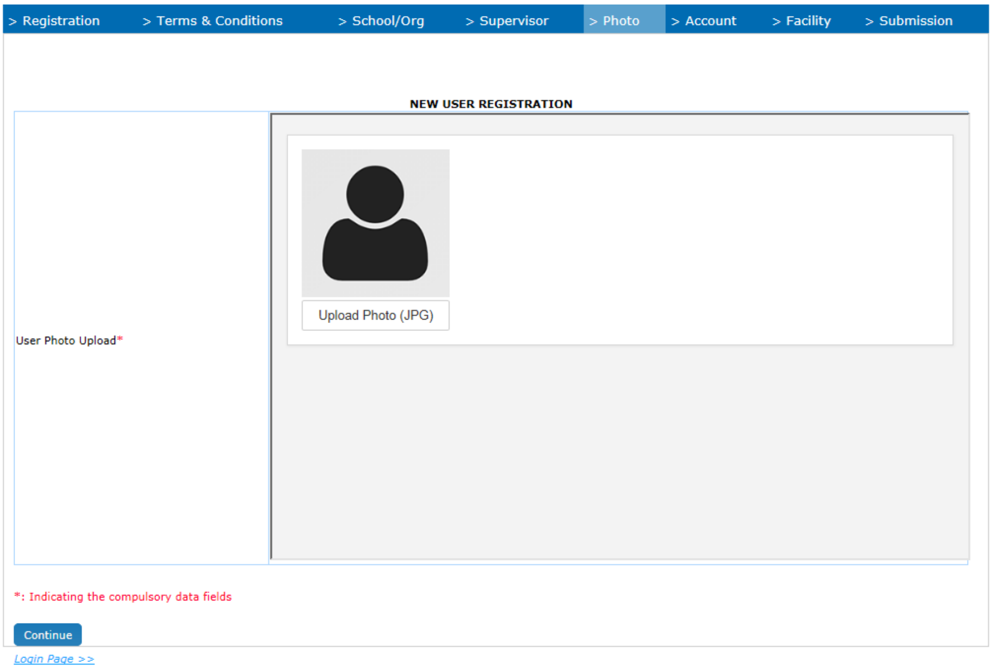


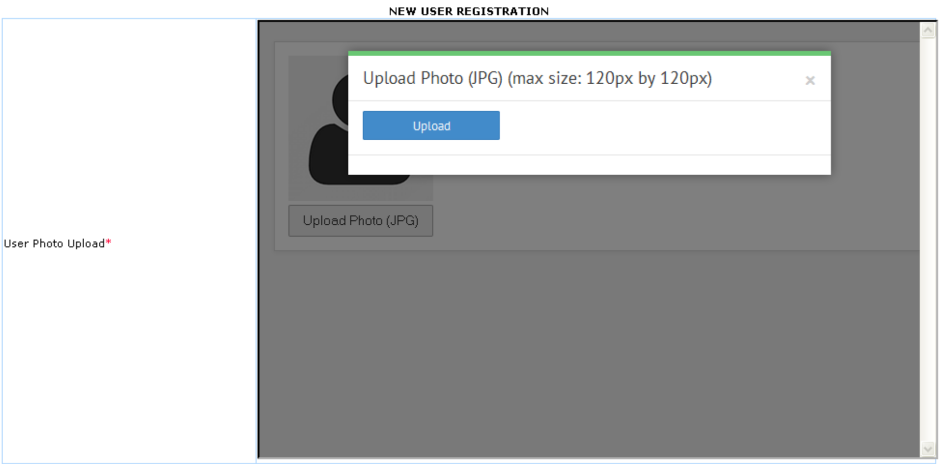
4. Supervisor selection/entry

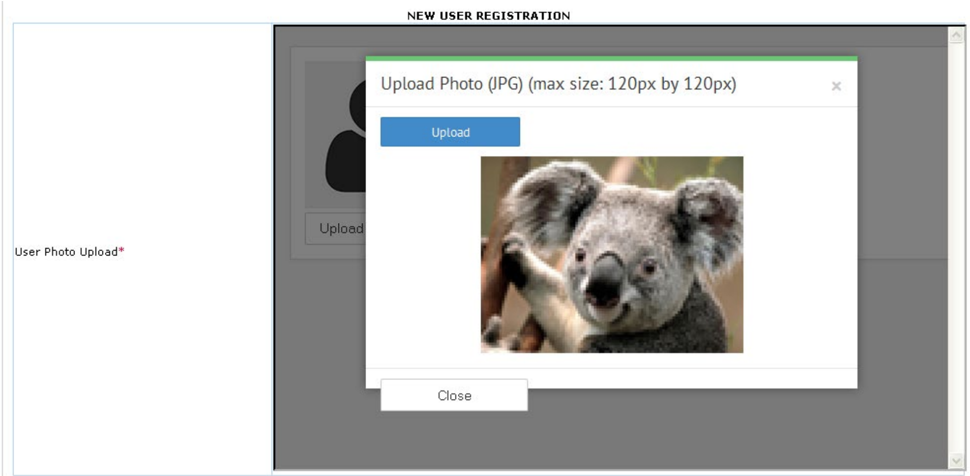
You can either select or enter the supervisor's name.



5. User photo (optional)

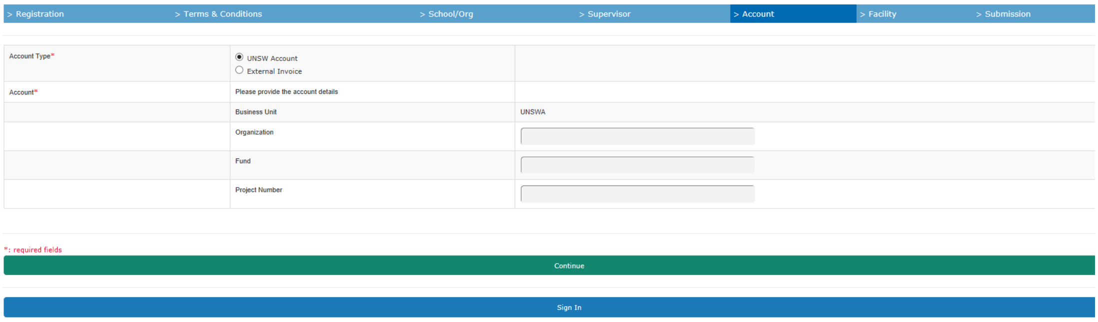






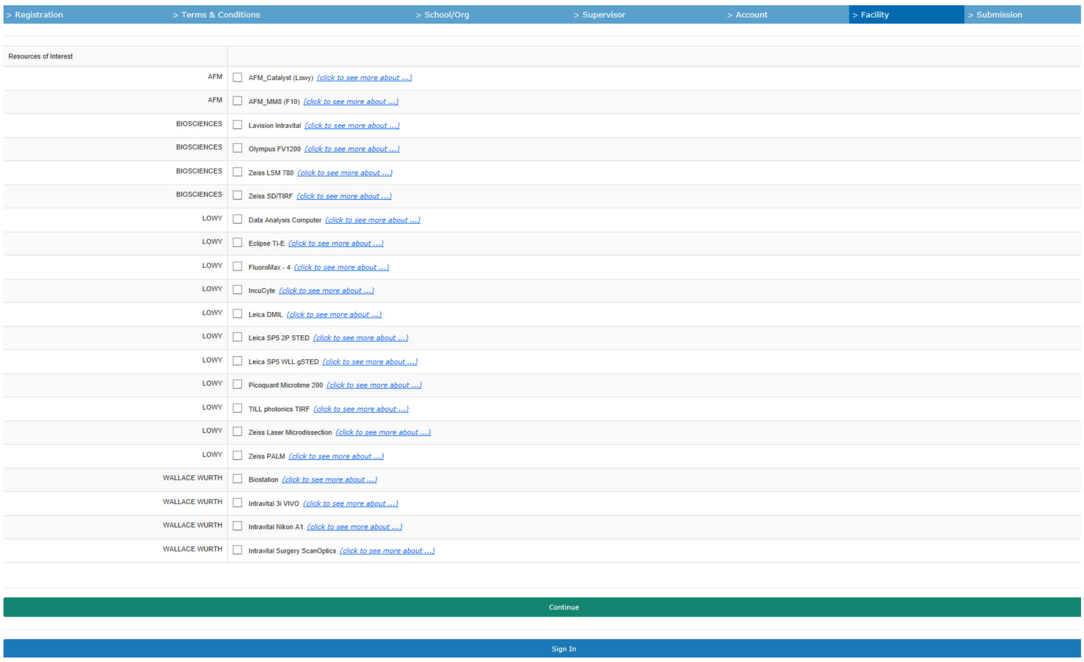
6. Account (optional)

If the account is internal, then the required code must be entered. If the account is external, then no further details need to be provided at this stage.



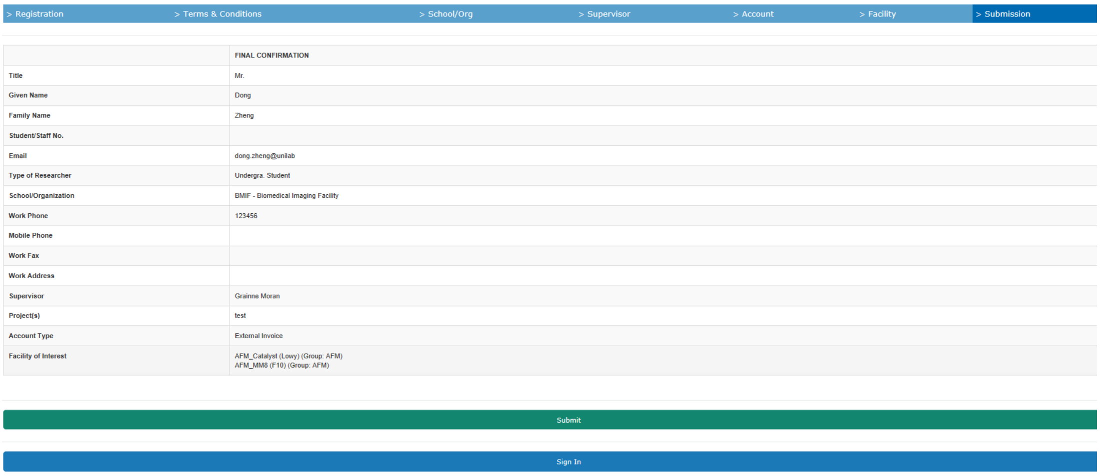
7. Resources of interest (optional)

Depending on the online resource registration settings in **Resource Manager**, users can select any resources that are of interest.

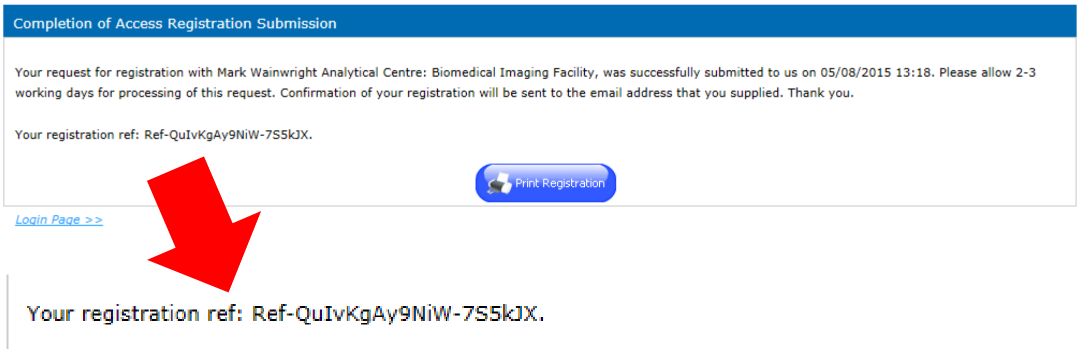


8. Confirmation and submission

The user is asked to confirm the registration details before making the final submission.

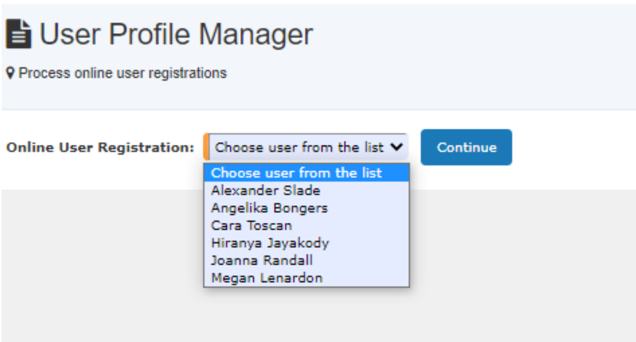


When the user clicks on **Submit**, the user's registration application is completed. The user and relevant staff members will receive registration notices. Each registration comes with a unique reference number for future reference. Though the user's application is now complete, their account will not be usable until their registration has been approved by a staff member.



- Approve online registration

Admin staff can process online registrations through ***User Profile Manager***. Click ***Online Registration.*** Click **Approve** to continue to the user registration page as stated in **Register Users Manually,** or **Delete** to cancel the registration.



Upon registration approval, system will send out an email notification to the user.

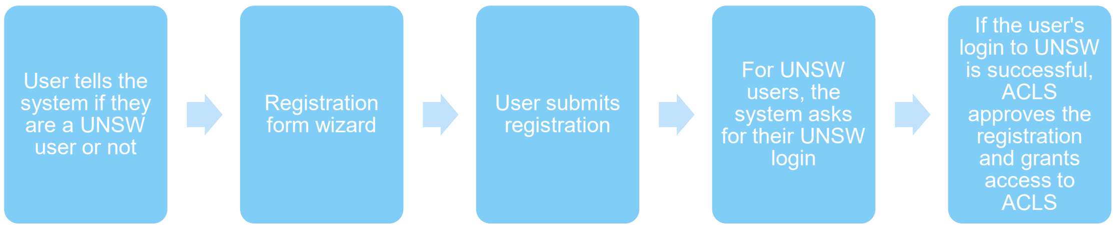
- Auto-approve online registrations

Some labs prefer having an auto-approving mechanism to reduce user wait times and reduce admin workload. In response to this need, ACLS provides an auto-approve mechanism which applies to local organization users only. For example, for ACLS deployed at UNSW, UNSW user registration feeds through the auto-approving process; for non-UNSW users, the registration process remains unchanged (meaning lab admins need to manually approve non-UNSW user registrations).

The auto-approving user registration only works when it meets the following conditions:

1. A system administrator has enabled auto-approve in the system settings
2. ACLS is connected to an organization ID system via LDAP

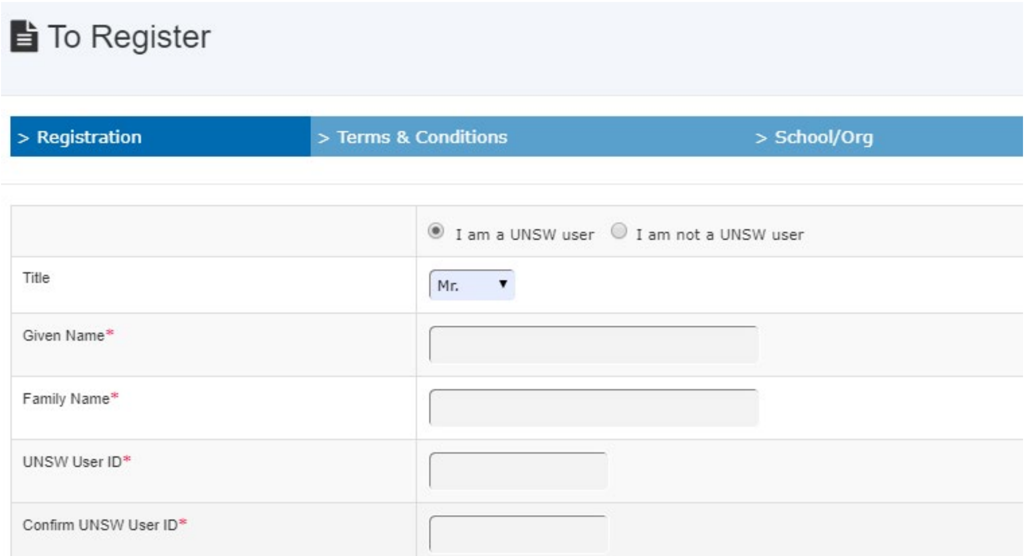
The auto-approving process is illustrated as below. In this system, the current registration form wizard is unchanged except for the last step (when users submit the form). Taking UNSW for an example:



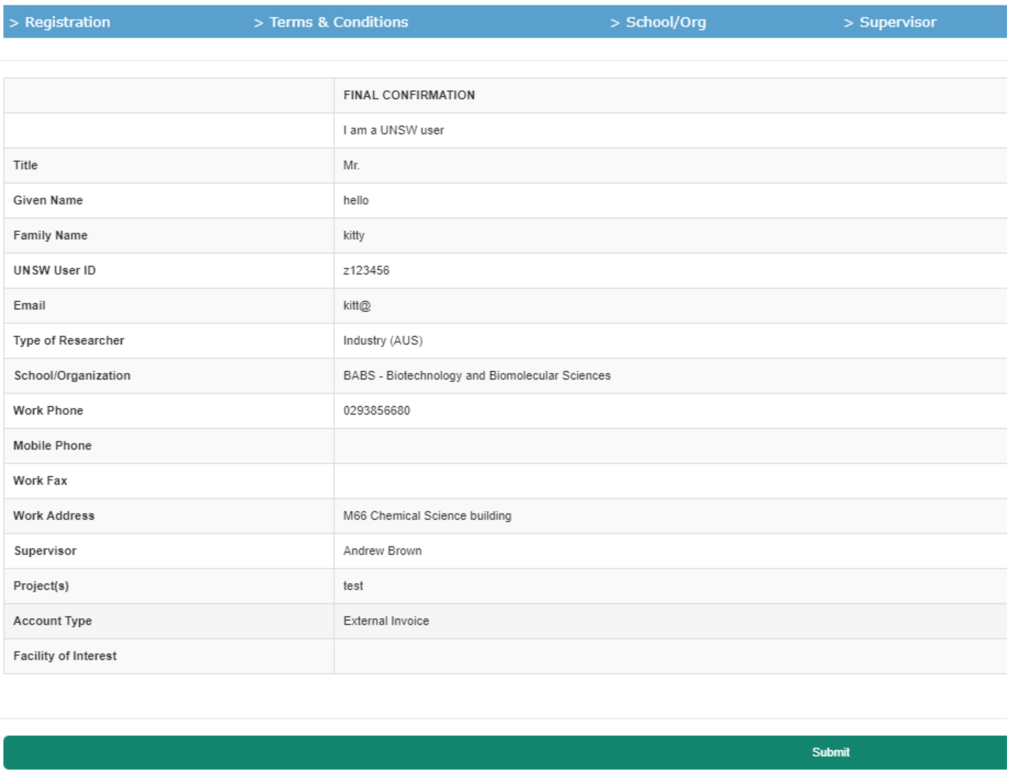
For system administrator, 2 global parameters need to be set to enable auto-approve. These are “EnableRegAutoApproval” and “OrgRegName”.

Parameter	Description
EnableRegAutoApproval	If enabled, auto-approving process is ON.
OrgRegName	Organisation name for registration form, for example, UNSW

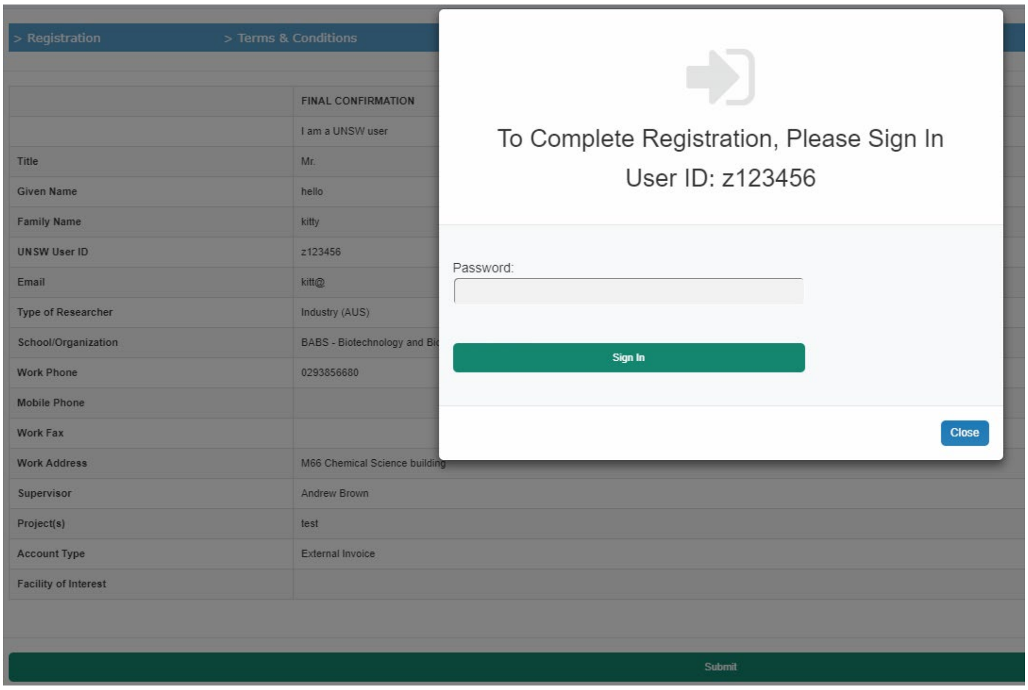
The UNSW option will be added to the first page of the registration form.



At the end of registration, if the user is UNSW staff or student, ACLS requests the UNSW sign in.

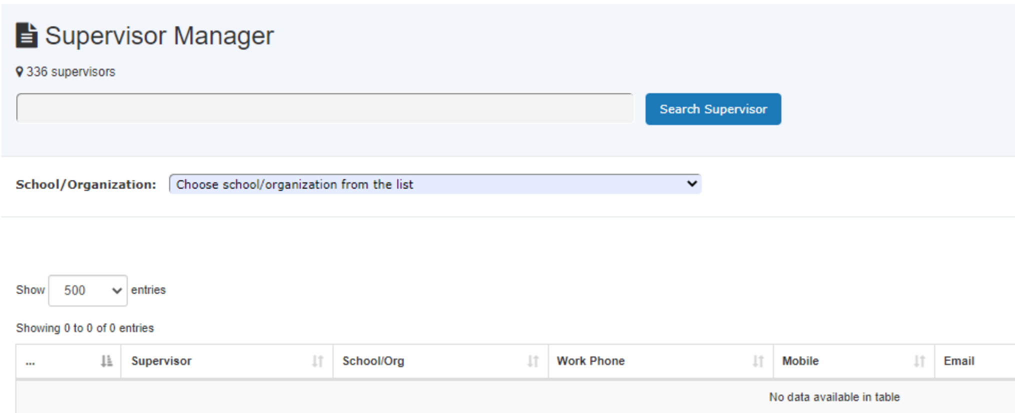


	FINAL CONFIRMATION
	I am a UNSW user
Title	Mr.
Given Name	hello
Family Name	kitty
UNSW User ID	z123456
Email	kitt@
Type of Researcher	Industry (AUS)
School/Organization	BABS - Biotechnology and Biomolecular Sciences
Work Phone	0293856680
Mobile Phone	
Work Fax	
Work Address	M66 Chemical Science building
Supervisor	Andrew Brown
Project(s)	test
Account Type	External Invoice
Facility of Interest	



4.4 Register Supervisors

A supervisor can be registered through ***Staff tab -> Utility -> Supervisor Manager***.



4.5 Logging in to ACLS

Enter your login email and password and click on **Login**.

Upon login, you will see the ***Booking Resources Tab*** or ***Loan Resources Tab*** page.

4.6 User Reset Password

Users can reset their password at the login page. After providing the email address, ACLS will send a password reset notification.

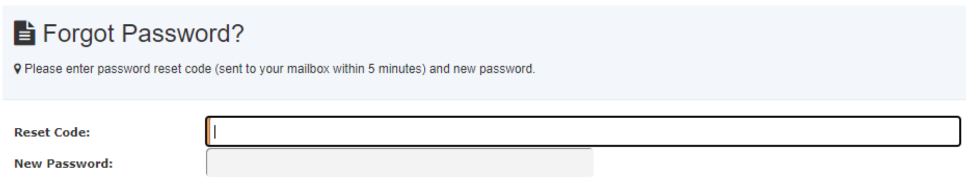
The reset code allows you to set a new password. An example email looks like this:

Dear Dong Zheng,

You have asked to reset your password associated with this email address (dm.zheng@unsw.edu.au).

Please enter the reset code directly into the password page:: Reset code : ACLS-SZGJHmHLkCPlUIg0h9KY7qvw3Xdrt6jx

Kind regards.

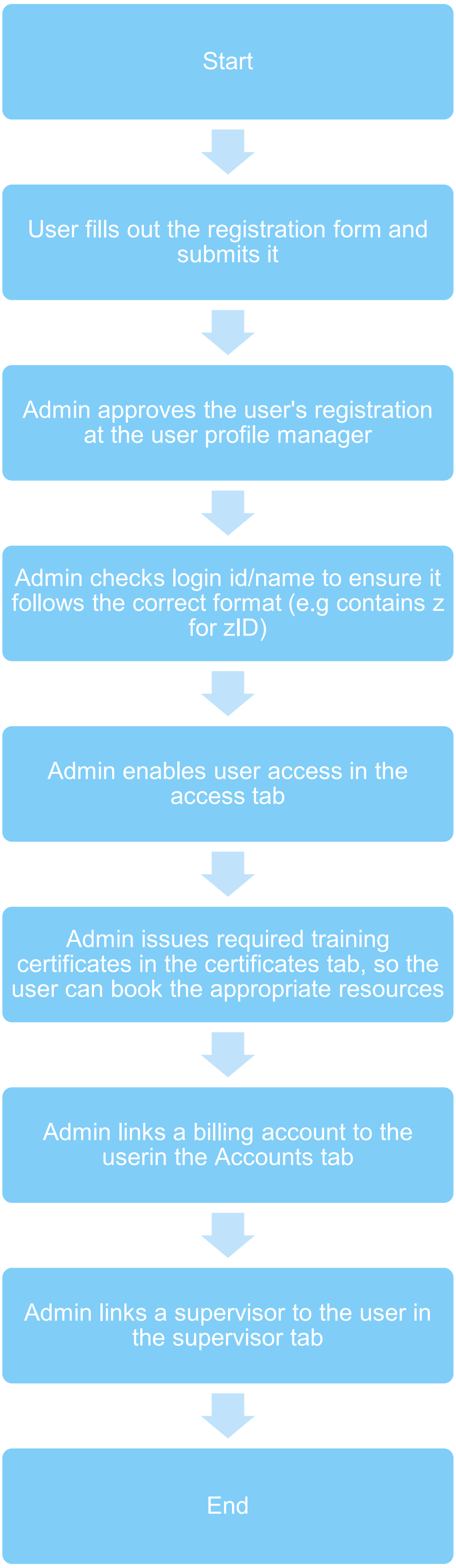


4.7 Admin Reset Password for User

Lab admin can reset the local encrypted password for users if SSO or LDAP is not enabled. Go to User Profile Manager to reset.

4.8 User Registration Approval Process

The following charts illustrates the process adopted at UNSW Sydney.


Start
User fills out the registration form and submits it
Admin approves the user's registration at the user profile manager
Admin checks login id/name to ensure it follows the correct format (e.g contains z for zID)
Admin enables user access in the access tab
Admin issues required training certificates in the certificates tab, so the user can book the appropriate resources
Admin links a billing account to the userin the Accounts tab
Admin links a supervisor to the user in the supervisor tab
End

5 Configuring ACLS

5.1 Configure System Settings (System Admins Only)

During initial setup, you **must** verify that the parameters defined in the system configuration panel are set out as required for your operations. Note that ACLS is compiled and deployed in the configuration of your choice, which affects the available options.

When ACLS is installed, the system configuration will be set to the default values. Go to ***System Settings*** and Select ***Configure System*** to make the global configuration changes:

Parameter	Description	Notes
Access Portal URL	The URL for the SSO Portal	Refer to Appendix M, Enterprise service
ACLS Lab Name	Informational	
ACLS Version	Informational	
Active Users For Training Booking	Modifies the user selection list for training bookings.	: Show all users in selection list for training bookings : Show active users only in selection list for training bookings
Adv Booking Reminder Day	Sets the number of days prior to the booking, for the purposes of sending out a reminder email	Default: 2 days
Azure Sign Out URL	An Azure AD configuration option. Only works when Azure authentication is integrated and enabled	Enterprise service
Booking Calendar Staff Only	Disables regular user access to booking calendar.	: Enable booking calendar to all (users and staff) : Enable booking calendar to staff only. This is the default.
Booking Display All	Either show all resources or show resources per resource group.	: Show resource selection list per resource group : Show all resources in one selection list
Booking Only	Switch between reporting usage data collected through the ACLS console, or through booking data.	: Usage data through logon console : Booking only
Calendar Multiple Days	Enables multiple day events on the calendar.	: Show multiple day events through the separate top row of the calendar : Show multiple day events through time continuously. This is the default.

CGI Directory	Set webserver location to retrieve CGI files, including book.dll.	For example: if hyperlink is http://localhost/cgi/book.dll, CGIDirectory should be “cgi”.
Clear Browser Cache	Adds html page header to block the browser cache.	: Allows caching : Add special cache header to stop browser cache. This is the default.
Commercial User Code	Used for commercial booking	
Consumable Order Collection Reminder Days	Set to Zero to disable the feature. If not zero value, system auto-sends the consumable order collection reminder to the users in xx days after the date that user places the order	days
Consumable Order Cancellation Days	Set to Zero to disable the feature. If not zero value, system auto-cancels the uncollected and open consumable orders in xx days after the date that user places the order	days
Contact Us Email	Used for “contact us” in the web footer	This should be a general email address for the lab
Data Directory	The server’s directory location for system data files.	For example, if the actual directoryis “d:\emudata”, DataDirectory should be “d:\emudata”.
Data Logbook Back Days	Number of viewable previous days for the data logbook calendar	Default: 360 days
Data Storage Ctrl	***No longer in use***	***No longer in use***
Deactivate If No Access Period	Period before automatically deactivating users that have not used any resources	Default: 120 days
Deactivate If No Picture Period	Period of allowable time before changing an active user to inactive if their photo is not available	Default: 120 days
Default Total Yearly Hours KPI	Informational	Used for data analysis
Default Total Yearly Training Hours KPI	Informational	Used for data analysis
Default User Group Code for Reg Approval	The default user group for newly approved users	
Doc Directory Name	Document directory name for storing printable html files.	For example, if the document directory is “d:\emudata\doc”, Doc Directory Name should be “doc”.

Doc Web Directory Name	Document virtual directory name as defined in web server configuration.	For example, if the web server sets the virtual path "/doc" to "d:\emudata\doc", Doc Web Directory Name should be "doc".
Email Data Date	Informational	Email server program updates the date to current date on daily basis; if not, ACLS may have a corrupted database.
Enable AAF Sign In	Enables AAF sign in through ACLS Single sign in. This connects through to the AAF (Australia Access Federation)	: Disable : Enable
Enable Account Exception Alert	Enables organisation GLC or account exception alerts, if the organisation account feature is enabled. This works only when SSI is enabled for organisation GLC, or if the account feature is enabled	: Disable : Enable
Enable Account Select For Booking	Enables account selection for the operation booking calendar and timeline booking calendar. If enabled, users must select account even if they have one account. Disabled by default.	: Disable : Enable
Enable Active Users for Job Reg	If enabled, user selection for sample job reg will show active users. If disabled, user selection for sample job reg will show all users.	: Disable : Enable
Enable Admin Timeline Calendar	Enables permission for admins to change any bookings on the resource timeline calendar	: Disable : Enable
Enable AI Assistant	Enable ACLS knowledge bot	: Disable : Enable
Enable ANFF UQ	Enables the ANFF UQ modification	: Disable : Enable
Enable Azure AD Sign In	Enables the Azure AD SAML Sign-in protocol	: Disable : Enable
Enable Banner for Login	Enables the banner image on the login page. By default, the system uses the built-in header.	: Disable : Enable

Enable Built In Sign In Page	Toggle book.dl sign in or index.php sign in	: Disable : Enable
Enable Calendar Start Date Selection for General User	Enables operation calendar start date selection for general users.. Disabled by default.	: Disable : Enable
Enable Certificate Search Hint	Enables showing the certificate list n the following locations: user certificate editor, user profile manager	: Disable : Enable
Enable Charge Category Manager	Enables the resource charge category method. Refer to the resource charge category chapter for details	: Disable : Enable
Enable Charge Rate On Calendar	Enables showing the resource charge rate on calendar pages	: Disable : Enable
Enable CMCA	Enables the CMCA modification	: Disable : Enable
Enable Consumable Module	Enables the consumable module, used for managing and ordering consumables	: Disable : Enable
Enable Consumable Order Qty Validation	Enables consumable order quantity validation against stock quantity. If the stock quantity is less than the ordered quantity, then the order is not accepted. Disabled by default.	: Disable : Enable
Enable Consumable QR code	Enables consumable QR codes. If QR codes are disabled, the mobile app will disable functionality for the consumable module.	: Disable : Enable
Enable Consumable Stock Email Alert	Enables daily consumable stock alert emails to all admin staff. Enabled by default.	: Disable : Enable
Enable Consumable Stock Update upon Delivery	Enables updates for consumable stock quantities upon delivery. If enabled, the stock quantity is updated once	: Disable : Enable

	a delivery is marked as delivered. If disabled, the stock quantity will not be updated in this way.	
Enable Consumable Stock Zero	If enabled, consumable stock quantities are prevented from going below zero. Negative values are set to zero. Disabled by default.	: Disable : Enable
Enable Corea Analytics	Enables the Corea analytics feature	: Disable : Enable
Enable Create User Folder	***No longer in use***	***No longer in use***
Enable Current Hour Booking Change	***No longer in use***	***No longer in use***
Enable Dashboard	Enables dashboard page and module	: Disable : Enable
Enable Data Logbook Manager	Enable data logbook manager for retrospective booking changes	: Disable : Enable
Enable Default Account	Enables the default account for tracker login	: Disable : Enable
Enable Email Server Alert	Enables a pop up alert message when the system administrator logs in	: Disable : Enable
Enable Facility Catalogue	Enables the resource catalogue feature. In this case, the term “facility” refers to resources.	: Disable : Enable
Enable Facility Status	Enables the resource status page. Only applies when the setting “Booking Only” is set to ON. In this case, the term “facility” refers to resources.	: Disable resource status page : Enable resource status page
Enable Facility Status Privacy	Enables user photos on the status page. In this case, the term “facility” refers to resources.	: Disable user photo display when users access the resource status page. Only staff can view photos. : Enable user photos display.
Enable Featured Report	Enables featured reports. Refer to the report chapter for more details.	: Disable : Enable

Enable Future Invoicing	Enables future invoicing. Refer to the invoice chapter for more details. Disabled by default.	: Disabled, meaning that admins can only run past invoices. : Enable
Enable Induction Process	Enables the induction process. Enabled by default.	: Disable : Enable
Enable Invoice Manager	Enables the invoice manager. Enabled by default	: Disable : Enable
Enable Lab Bot	Enable research lab knowledge bot	: Disable : Enable
Enable Lab Bot Disclaimer	Enable research lab knowledge bot disclaimer	: Disable : Enable
Enable Labcast	Enables the labcast feature in ACLS. This is a UniLab integration to cast a live calendar via the UniLab labcast service.	: Disable : Enable
Enable Loan Item	Enables the loan item module and feature	: Disable : Enable
Enable Loan Item As landing Page	Sets the loan item page as the landing page after signing in, instead of the default landing page (the Bookings page).	: Disable : Enable
Enable Mail To User For User Booking	Enables email notifications to the users of a booking.	: Disable : Enable
Enable MCN	Enables the MCN modification	: Disable : Enable
Enable Mobile SMS	Enables the mobile sms server. This requires a specific configuration and a mobile sms plan. Disabled by default.	: Disable : Enable
Enable Moxy Sign In	This is a UniLab integration. Enables using a Moxy code to sign in on a MoxyTouch screen for the purposes of making bookings and ordering consumables.	: Disable : Enable
Enable My Data	Enables the data cluster connection to a file storage service. Options include	: Disable : Enable

	Nextcloud or FTP. UNSW only.	
Enable Nextcloud	***No longer in use***	***No longer in use***
Enable Online Reg Project	Enables the project field in the online registration form.	: Disable : Enable
Enable Online User Password Reset	Enables the reset password feature	: Disable : Enable
Enable Order Consumable Login	Enables the consumable order logo on login page	: Disable : Enable
Enable Org Master Account	Enables the organisation GLC and account validation feature	: Disable : Enable
Enable Org Master Account For Reg	Enables the organisation GLC and account validation feature for user registration.Disabled by default.	: Disable : Enable
Enable Outlook Calendar Export	Enables calendar exports for Outlook or any service supporting ICS e.g Google Calendar. Users can export My Calendar data. Staff can also export Resource calendar data.	: Disable : Enable
Enable Privacy Calendar	Enablespublic display of booking details on the public access calendar	: Disable : Enable
Enable Publication	Enables the publication data feature. Enabled by default.	: Disable : Enable
Enable Public Calendar	Enables a public display calendar that can be seen without logging in.	: Disable : Enable
Enable Random Pick Home Video	Displays a video on the home page.	: Disable : Enable
Enable Reactivation Page	Displays a reactivation link on the login page	: Disable : Enable
Enable Reg Auto Approval	Enables the auto approval process for user registrations. Requires the integration with the organisation's LDAP system. Refer to the Auto	: Disable : Enable

	Approve chapter for more details.	
Enable Reg Pathway	Enables the pathway for online registrations.	: Disable : Enable
Enable Reg Project Compulsory	Sets the project field in the user registration to compulsory	: Disable : Enable
Enable Repeat Booking	Enables the repeat booking feature for the operation booking calendar	: Disable : Enable
Enable Resource Booking	Enables the Booking tab page. This option is only useful when ACLS is only used for a loan item service.	: Disable : Enable
Enable Resource Charge on Catalogue	Enables resource charge rates in the resource catalogue	: Disable : Enable
Enable Resource Data	Enables the resource tile in My Data	: Disable : Enable
Enable Resource Field Customisation	Enables customisation of the resource database field	: Disable : Enable
Enable Resource Maintenance	Enables the resource maintenance profile and module	: Disable : Enable
Enable Sample Details In Report	Enables full sample details in the sample report	: Disable : Enable
Enable **Sample Job Alert**	Enables the sample job overdue alert. The alert triggers once daily.	: Disable : Enable
Enable Scan User Folder	***No longer in use***	***No longer in use***
Enable Service Repeat Booking	Enables the repeat booking feature for the service booking calendar	: Disable : Enable
Enable Session Hour Check	Enforces the minimum booking unit check for each booking event.	: Disables the minimum booking unit check. : Enables minimum booking unit validation for each event. If the booked hours are less than the min booking unit, the event will not be saved.
Enable Share Labcast	Allows admin staff to grant share permissions for other admins to manage their	: Disable : Enable

	labcast settings. Useful if an admin needs to take leave.	
Enable Single Sign-In	Enforces Single Sign-On mode. If enabled, users can only access ACLS via Single Sign On	: Disable : Enable
Enable Smart Phone App	Enables mobile web sign in. If enabled, users can sign in to the mobile app to book resources and order consumables.	: Disable : Enable
Enable SMTP Mailer Server	Enables the mailer server on ACLS server. The mailer server deals with authenticated SMTP services, such as sending emails.	: Disable : Enable
Enable Space Booking	Enables the COVID-19 space booking feature, used to enforce social distancing.	: Disable : Enable
Enable Staff Calendar	Enables staff calendar. Disabled by default.	: Disable : Enable
Enable Staff Roster Notification	Enables email notifications for staff roster changes. Disabled by default.	: Disable : Enable
Enable Subscription Credits	*Not implemented yet*	
Enable Survey	Enables the survey module.	: Disable : Enable
Enable Term Condition	Enables the terms and conditions display on the webpage footer, and on the dashboard menu	: Disable : Enable
Enable Timeline Calendar	Enables the timeline calendar. Enabled by default.	: Disable : Enable
Enable Title For Login	Enables the title bar on the login page	: Disable : Enable
Enable Track Samples	Enables the Track Sample module	: Disable : Enable
Enable Unapproved Booking Report	Enables unapproved booking report in report manager	: Disable : Enable

Enable User Booking Confirmation	Sends booking confirmation alerts to users a few days before the booking time. Users can confirm the booking or cancel the booking	: Disable : Enable
Enable User Contact in Operation Calendar	Enables user contacts for general users in the operation calendar	: Disable : Enable
Enable User Photo Change in My Profile	Allows users to change their photo in My Profile	: Disable : Enable
Enable User Portrait Photo	Enables user portrait photo in the user profile. Note that this does not refer to the thumbnail user photo.	: Disable : Enable
Enable User Privacy Calendar	Sets calendar booking details to private. Users will only be able to see their own bookings. Other bookings will appear as Busy.	: Disable : Enable
Enable User Profile Usage Tab	Enables the user usage/booking report tab in the user profile editor and the user profile manager	: Disable : Enable
Enable WHS Document	Enables the WHS document module. Only avaliable on the Single Sign In Portal. UNSW Only.	: Disable : Enable
Enable XNAT	***No longer is use***	***No longer is use***
Equipment General Staff Consumable Access	Allow staff in the general staff access category to access the consumable library	: Disable : Enable
Equipment Supervisor Consumable Access	Allow staff in the equipment supervisor access category to access the consumable library	: Disable : Enable
EXCEL Password Protection	***No longer is use***	***No longer in use***
Facility Charging	Enables the resource charging policy in Resource Manager. In this case, the term “facility” refers to resources.	: Disable : Enable
Facility Status Display All	Resources display their status regardless of any restrictions. This means any users can see the full list of resource statuses. In this case, the term “facility” refers to resources.	: Disable, this is the default : Enable

Resource Status Image Height	Sets the resource image height	Height of resource image shown in resource info page is defined here
Resource Status Image Width	Sets the resource image width	Width of resource image shown in resource info page is defined here
FTP Host Name	***No longer in use***	***No longer in use***
FTP Login	***No longer in use, for archival purposes only.***	***No longer in use, for archival purposes only.***
FTP Password	***No longer in use, for archival purposes only.***	***No longer in use, for archival purposes only.***
Home Page Link	Sets a home page URL on the footer	If this is blank, the home link will not be displayed
Https Enable	Enables https access depending on the web server settings. Disabled by default.	: Disables https access. If selected, web access is standard http : Enables https access. This option is strongly recommended.
Include Consumable to Usage Invoice	Adds consumable orders to invoices. Enabled by default.	: Disable : Enable
Invoice Accessible By Supervisor	Allows supervisor access to invoice statements.	: Disable : Enable
Jaggaer Chemical Inventory URL	Setting for Jaggaer integration	Please contact support for details
Jaggaer Sign In URL	Setting for Jaggaer integration	Please contact support for details
LDAP Compulsory Check Text	Sets the default text string for enforcing compulsory LDAP	If set to 'unsw', the system checks if the user email contains 'unsw'. If so, it automatically enforces LDAP access control
LDAP Pre-Configure	Auto-runs a tool to configure user access through LDAP.	: OFF : ON
LDAP Text on Login Page	Displays a special text on the login page to remind users to login with an organization-wide ID.	For example, "UNSW staff and students must use zID/zPass to login"
Logbook Manager To Staff	Enables general staff access to the data logbook manager function.	: Disable : Enable
Login Name Tip	Sets the tip text for the login name form on the login page	Default is "Welcome"
Login Using Email	Enforces email as the login name.	: Disable : Enable
Logon Server Check	***No longer in use***	***No longer in use***
Logon Timer Ctrl	Enables session timer for the ACLS tracker	: Disable

		: Enable
Maintenance Auto Alert Days	Sets up early warning notifications for the resource maintinence schedule. The schedule is set out in the resource maintenance profile.	
Max Booking Form Number	Sets a limit for the uploaded resource booking form	Max 5
mCloud User Guide URL	***No longer in use***	***No longer in use***
Min Unlogged Time	Time (in minutes) before an instrument computer no longer enforces the booking login.	Default: 5 minutes
Moxy Sign In Token	Refer to the Moxy user guide at moxy.unilab.com.au	
Moxy Sign In URL	Refer to the Moxy user guide at moxy.unilab.com.au	Defaults to UNSW
Multiple Click Prevention	Prevents the same form from being submitted multiple times on accident. Disabled by default.	: Disable. : Enable.
Online Reg Ctrl	Enables online registration.	: Disable : Enable
Online Reg Visitor ID	Sets the default ID for external visitors	e.g. 000
Online Reg Visitor ID Compulsory	Enforces Student/Staff ID as a compulsory entry field in the registration form.	: Not compulsory : Compulsory
Org Reg Name	If organisation GLC or account validation feature is enabled, sets the button in Account Manager.	Defaultsto UNSW
Pictures Directory Name	Sets the picturedirectory for storing the user photos.	For example, if the directory is "d:\emudata\pictures", Pictures Directory Name should be "pictures".
Pictures Web Directory Name	The picture virtual directory as defined in web server configuration.	For example, if the web server sets the virtual path "/pictures" the Pictures Web Directory Name should be "pictures".
Privacy Statement Link	Set the privacy statement link at footer	If this is blank, the privacy statement link is not displayed
Project Manager	Enables the "Project Manager".	: Project manager is OFF : Project manager is ON
Python Tracker Poster Menu	Refer to the ACLS tracker guide	Informational purposes only

Reg Account Field 1	Used as an account field for account entry in the online registration process	If blank, then this field entry is disabled
Reg Account Field 2	Used as an account field for account entry in the online registration process	If blank, then this field entry is disabled
Reg Account Field 3	Used as an account field for account entry in the online registration process	If blank, then this field entry is disabled
Reg Account Field 4	Used as an account field for account entry in the online registration process	If blank, then this field entry is disabled
Reg Copy Delete Days	Period of time that ACLS retains temporary copies of a registration form. After this period of time, it is deleted. Only avaliable if the UWA modification is active.	Default: 14 days
Reg Def Account	***No longer in use***	***No longer in use***
Report By Any Period	When disabled, reports span two chosen months. When enabled, reports span two chosen days.	: Reports span two chosen months : Reports span two chosen days.
Report Deepness (Depth)	The range of years for generating reports	Default: 1 year
Restrict Bookings To General Staff	If enabled, general staff are treated like a user, meaning they require a training certificate before any bookings can be made.	: No restrictions to staff with respect to making bookings : Staff can only make bookings if they are qualified as a trainer or being trained
Restrict User Support Ticket Access	If enabled, users can only access his own ticket; if disabled, users can see everyone tickets.	: No restrictions : restricted
Server Calendar Date Format	The format should match the regional server time format	Default: mm/dd/yyyy (US format) Australia: dd/mm/yyyy
Server Name	This should be the ACLS web server IP address or the ACLS domain name	e.g. www.xxx.xxx.xxx
Service User Code	The user code for the service user. The service user is used for service bookings and other use cases on behalf of the facility.	

Show Tracker Hours in Report	Makes reports display both tracker hours and booking hours for comparison.	: OFF : ON
Show Video Clip Booking Tab Home	Displays a video clipon the booking tab home page	: OFF : ON
SMTP Server Name	Only if Enable SMTP Mailer Server is enabled. The local SMTP server domain name. in use	e.g. smtp.unsw.edu.au
Staff Roster URL	UniLab integration. Sets the staff roster calendar. Refer to the UniLab MoxyTouch user guide.	For informational purposes only.
Title Beg	The system web page title beginning	
Title End	The system web page title end	
Title To Resource Catalogue	Adds an additional title in front of the Resource Catalogue on the booking landing page.	e.g UNSW Resource Catalogue
Title To Show	The System title on the logon page	
Tracing Data Date	***No longer in use***	***No longer in use***
Training Support Request	Enables the Support module	: OFF : ON
User Access Expiry Alert	Sets the number of days before an advance warning is emailed to the user prior to expiry.	If set to 0, the alert is off. If set to 30, then an alert will be sent out to the user 30 days prior to expiry. Expiry date is set on a per-user basis on their profile page.
User Account For Reg	Enables finance account entry in the online registration process.	: Account entry not required : Account entry required
User All Account Search	Enables the finance account search function in user profile manager	: Disable : Enable
User Folder Format	***No longer in use***	***No longer in use***
User Photo Availability Check	s Enforces user photo availability check. The system checks if the user photo exists. If there is no photo, the user's access is disabled after a period of time. The period of time is determined by the	: The system does not enforce a photo check. : . The system enforces a user photo check. If not avaliable, user access is disabled.

	DeactivateIfNoPicturePeriod setting. Disabled by default.	
User Photo For Reg	Enforces user photo upload in the online registration process.	: User photo is not required : User photo must be provided
Valid Email Login	Enables a login name validation check.	: Validation not required : The login name must be composed of numbers and letters
Version Control	ACLS developer setting	For informational purposes only.
Web Access Validation	Enables user certificate validation. If enabled, ACLS uses web access records to validate.	: Disable : Enable

5.2 Configure Resource Groups

In the context of ACLS, “resource” refers to an instrument, equipment, tool, device, or something you wish to book. Before setting up resources, you need to determine the resource grouping strategy. This involves setting up groups for similar kinds of resources.

5.2.1 Resource Group Levels

ACLS supports up to 3 levels of resource group structures. Go to ***Utilities -> Resource Manager -> Resource Group*** to set up resource groups. The multi-level resource group is like creating the multi-level data folders.

------- Root level resource group
----------- Level 1 resource group
------------ Level 2 resource group
------------ Level 2 resource group
----------- Level 1 resource group
------------ Level 2 resource group
----------- Level 1 resource group
------------ Level 2 resource group
------------ Level 2 resource group
------------ Level 2 resource group

For example, set up resource groups according to locations

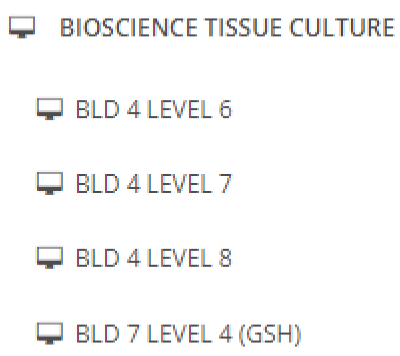
Medicine building group
----------- Ground level group
------------ Room G01 group
------------ Room G02 group
----------- Level 1 group
------------ Room 101 group
----------- Level 2 group
------------ Room 21 group

------------ Room 22 group
------------ Room 23 group

Resource group auto-group based on the same upper group name.

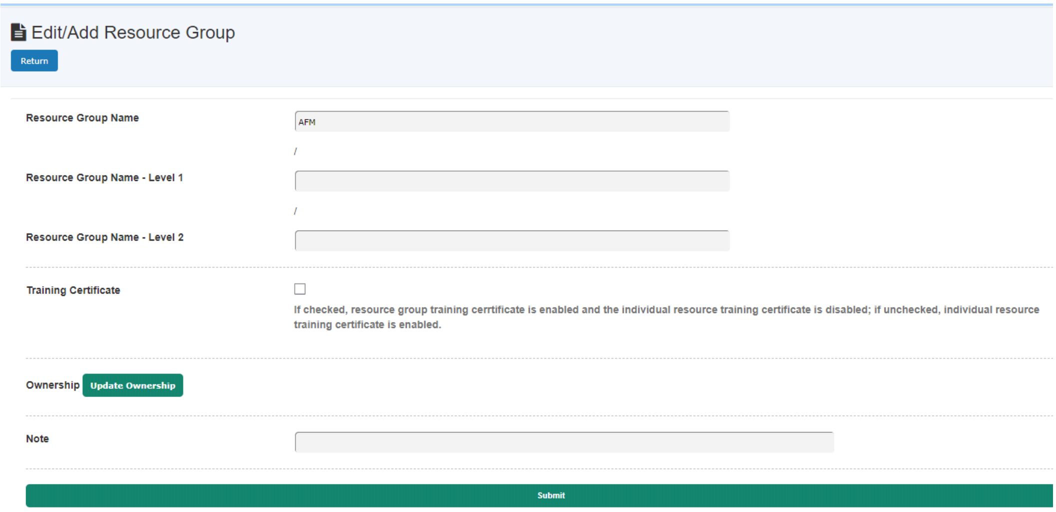
PROTEIN PRODUCTION & STRUCTURE FACILITY	/	PROTEIN PRODUCTION PC2 LAB	/		
PROTEIN PRODUCTION & STRUCTURE FACILITY	/	INTEGRATED CRYSTALLISATION FACILITY	/	BIOMOLECULAR INTEGRATIONS FACILITY	Standard Module (Hourly)
PROTEIN PRODUCTION & STRUCTURE FACILITY	/	INTEGRATED CRYSTALISATION FACILITY	/		

On calendar pages, you could see the created multi-level resource groups.



5.2.2 *Set Up Resource Group Ownership*

You should consider set up resource group ownership if you are in a situation of dealing with mult-groupings. By setting this up, each unit owner or staff-in-charge can administrate resources, trainers and certificates.

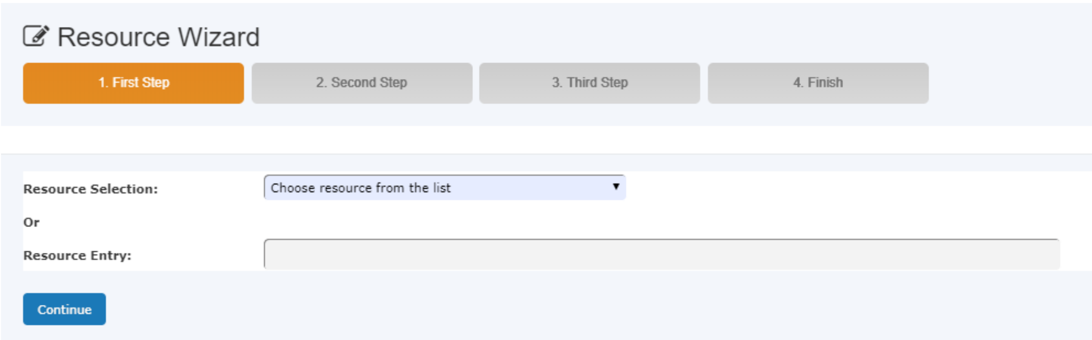


Click “Update Ownership” to add or update ownership. Owners of the resource can be chosen from the equipment supervisor role or a higher-level role. The owners will be able to manage their own resources, trainers and certificates.

5.3 Configure Resources

5.3.1 Resource Wizard:

The resource wizard guides you through a ‘one-stop-shop’ process to set up new resources. Simply follow the process step by step to set up a new resource or, or select an existing resource to change resource settings.



5.3.2 Resource Manager

An experienced administrator can use the ***Resource Manager*** to add/edit/archive a resource.
The following sub-sections are available:

- Office/Lab Space & Resources
- Resource Groups
- Booking Resources
- Loan Resources
- Non-booking Resources
- Archived Resources
- Linked Booking Resources
- Printable Resource QR Codes
- Resource List for Registration
- Resource Tracker and Status
- Resource Tracker Home Drive

Resource Profiles:

The following tabs are available in the Resource Profile:

- General profile

This section covers general resource settings.

Field	Definition
Resource Name	The full name of the resource
Resource Group	The resource group name
Resource Image	A resource image, one per resource
Resource QR Code	The resource QR code. Scanning with a smart phone allows the user to make bookings.
Operation Status	Either active or inactive. The resource must be active for trainers and training certificates to be set up.

- Booking profile

This section covers resource booking parameters.

Field	Definition
Min Day Per Session	Defines the minimum advance days required before a booking can be made. For example, if this is set to 2 days, users must book the session more than 48 hours in advance, otherwise the system declines the booking.
Min Hour Per Session	Defines the minimum time for each booking session. For example, if this is set to 2 hours, users have to book the session for more than 2 hours, otherwise the system declines the booking
Min Time per Session	A number that defines the minimum time a user is able to book a session. The calculation is: (min day per session) * 24 + min hour per session
Min Booking Unit	The unit of time that makes up a booking. Either 5 minutes, 15 minutes, 30 minutes, or 1 hour
Multiple Bookings At Same Time	If enabled, multiple users can make overlapping bookings in the same timeframe. This is useful for the special space booking.
Compulsory Booking Confirmation	If enabled, booking confirmations become compulsory for each booking made. If disabled, users can decide whether they want to have a booking confirmation for each booking made.
Booking Alert	If enabled, a user booking also sends a notice to the resource trainers.
Training Certificate	Indicates whether the resource requires a user training certificate to book. For example, some resources do not require training to operate.
Pre-Approval Booking	If enabled, bookings made by users must be approved by a trainer or manager.
In-Progress Booking Change	If enabled, users and staff can edit an in-progress booking. For example, if a booking is from 10am to 2pm, and the current time is 12:15pm, then the user can choose to reduce the booking time from 10am to 12:15pm.
In-Progress Booking Cancel	If enabled, users and staff can cancel an in-progress booking. For example, if a booking is from 10am to 2pm, and the current time is 12:15pm, then users

	can cancel the booking. Note that this feature may be abused by users to cancel a booking after they start to operate the tool or resource.
Booking Enable	Enable or disable resource booking availability.

- Lab space profile

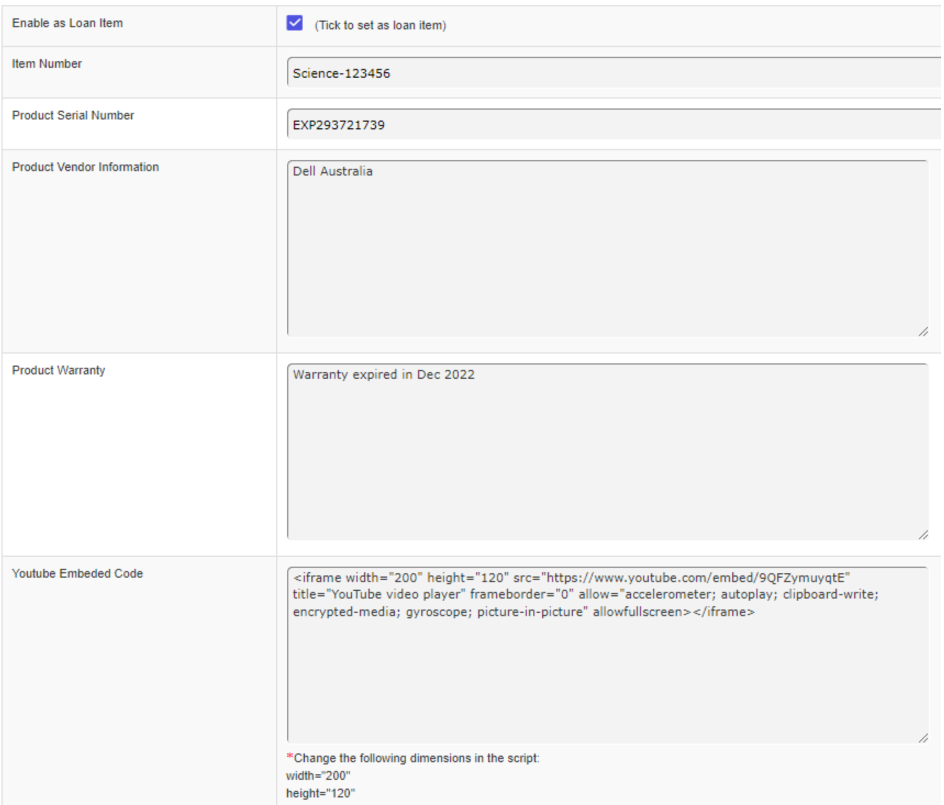
  Lab space is a feature made in response to COVID-19. It enforces social distancing by setting a limit of concurrent users in the lab space. You can add or remove the resource from a pre-defined lab space.

- Loan item profile

  The loan item module operates like a library. Like borrowing a book, the loan item module system provides 3 basic features:

  - Collect
  - Return
  - Book

  Setting up the resource as a loan item involves going to the Loan Item Profile tab and selecting enable. After that, there is a list of parameters that need to be filled out:



Enable as Loan Item	(Tick to set as loan item)
Item Number	Science-123456
Product Serial Number	EXP293721739
Product Vendor Information	Dell Australia
Product Warranty	Warranty expired in Dec 2022
Youtube Embeded Code	<iframe width="200" height="120" src="https://www.youtube.com/embed/9QFZymuyqtE" title="YouTube video player" frameborder="0" allow="accelerometer; autoplay; clipboard-write; encrypted-media; gyroscope; picture-in-picture" allowfullscreen></iframe> *Change the following dimensions in the script: width="200" height="120"

Field	Definition
Item Number	e.g. Science-123456
Product serial number	e.g. The Dell service express code
Quantity	Quantity of the item, if there is more than one available
Purchase date	Item procurement date
Product vendor information	e.g. Dell
Product warranty information	e.g. 12 months warranty
Youtube video	Product Youtube link
Custodian	

- Catalogue profile

The resource catalogue settings are as follows:

Field	Definition
Resource Type	Following types are selectable. In the future, each type of resource has its own booking event template. Select from a resource type. The given categories are: ○ Research EquipmentTeaching Equipment ○ Field Equipment ○ Lab Equipment ○ Office Equipment ○ Office Space ○ Lab Space ○ Loan Item ○ Service ○ Meeting Room ○ Vehicle ○ Others
Catalogue Access	The following access categories are available: **Local access:** users who can sign in to ACLS **Organisation access:** users who can sign in to SSI **Universe access:** users who can sign in to AAF **Disable access:** resource is not shown on catalogue
Asset Number	Resource asset number in the organization asset system
Item Number	Resource item number in the organization asset system
Description	Resource description
Specification	Resource specification
Location	Resource location, e.g. room number, building name

Website	Resource website URL
Upgrades	Upgrade information
Brand	Resource brand
Model	Resource model
Serial Number	Resource serial number
Custodian	Resource custodian

- Maintenance profile

  The maintenance profile manages maintenance activities, schedule, and cost. The maintenance profile covers the following properties:

  - Resource brand
  - Resource model
  - Resource serial number
  - Maintenance level
  - Last maintenance date
  - Last maintenance comments
  - Maintenance/certificate type
  - Next maintenance due date
  - Maintenance frequency
  - Estimated maintenance cost
  - Maintenance cost owner
  - Cost owner others

- Charge rates

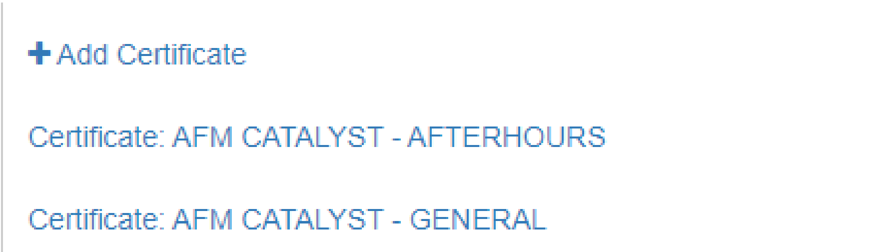
This setting is subject to global ACLS settings. If you would like to configure the resource charging method, please refer to the Resource Charging chapter.

- Booking forms

This setting is subject to global ACLS settings. If you would like to enable booking forms, please refer to the Resource Booking Form chapter.

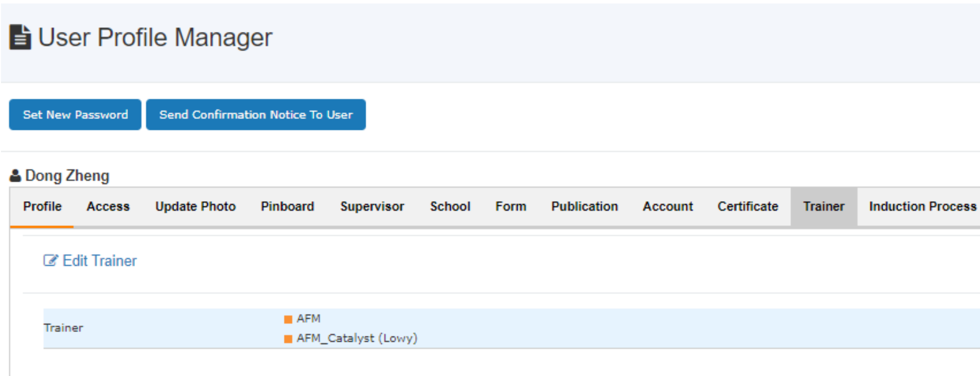
- Training certificates

You can add new training certificates and edit current certificates. Please refer to the Resource Training Certificate chapter for further details.



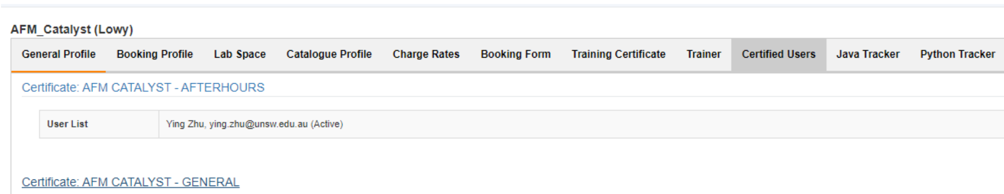
- Trainers

You can set up trainers here. Please refer to the Resource Trainer chapter for further details.



- Certified users

This tab contains a list of certified users.



- Desktop tracker app

This tab configures the ACLS Tracker. Please refer to **Appendix I – ACLS Desktop Tracker** for details.

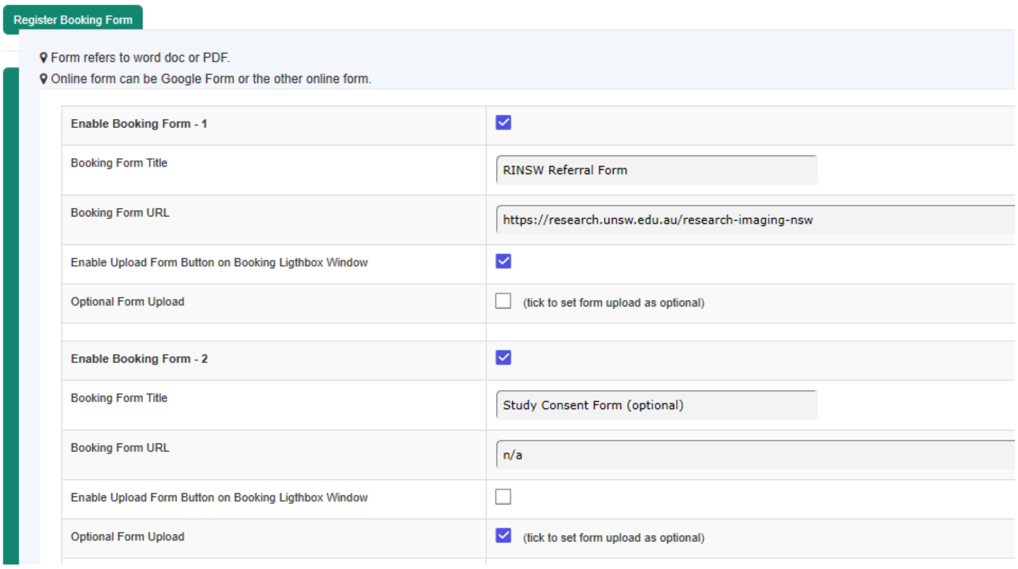
Field	Description
Resource	Resource name
Host ID	Generated unique ID for this resource. Generated upon creation. Can be reset.
ID Type	The type of ID being used e.g Host ID
Block hot-keys	If set to block, then windows hotkeys like START-D are blocked. This prevents users from bypassing the tracker without logging in.
Block task manager	If set to block, the windows task manager will be disabled, so users cannot forcibly close the tracker.
Enable account/project selection	If enabled, users must select an account/project when logging in. This can be disabled if the resource is free of charge.
Enable locking screen	If enabled, the lock function is enabled. The user is able to create a lock screen on a logged in device to prevent anyone else from logging in, so they can leave the computer unattended. Staff members are able to unlock a locked screen.
Enable Show Last Login User	If enabled, the tracker displays the most recent user and the day they logged in.
Enable auto-logout	If enabled, the tracker automatically logs out the user after a set period of time.
Auto-logout hours	Defines the number of hours used for the auto-logout feature.
Enable full-screen mode	If enabled, the tracker's login screen is set to full screen and cannot be bypassed without logging in.
Enable booking first policy	If enabled, a booking is required for the user to sign in to the tracker. This feature ensures users cannot freely use instruments without a prior booking.
Enable data drive mapping	Deprecated feature.
Enable email for sign in and sign out	If enabled, the user and the resource trainers will receive email notifications documenting their sign in and sign out.
Enable sensor app execution with tracker	Enables the ACLS Sensor app, which is used to scan hardware and software information from the resource computer. See the ACLS Sensor section for more details.
Enable Windows account logoff	If enabled, signing out of the tracker will also sign out of Windows.
Enable logoff Windows account button on tracker app login page	If enabled, the tracker login page will show an additional button that signs out of Windows.
Connection Allowed	Enables or disables the tracker.

Note	Free space for notes.

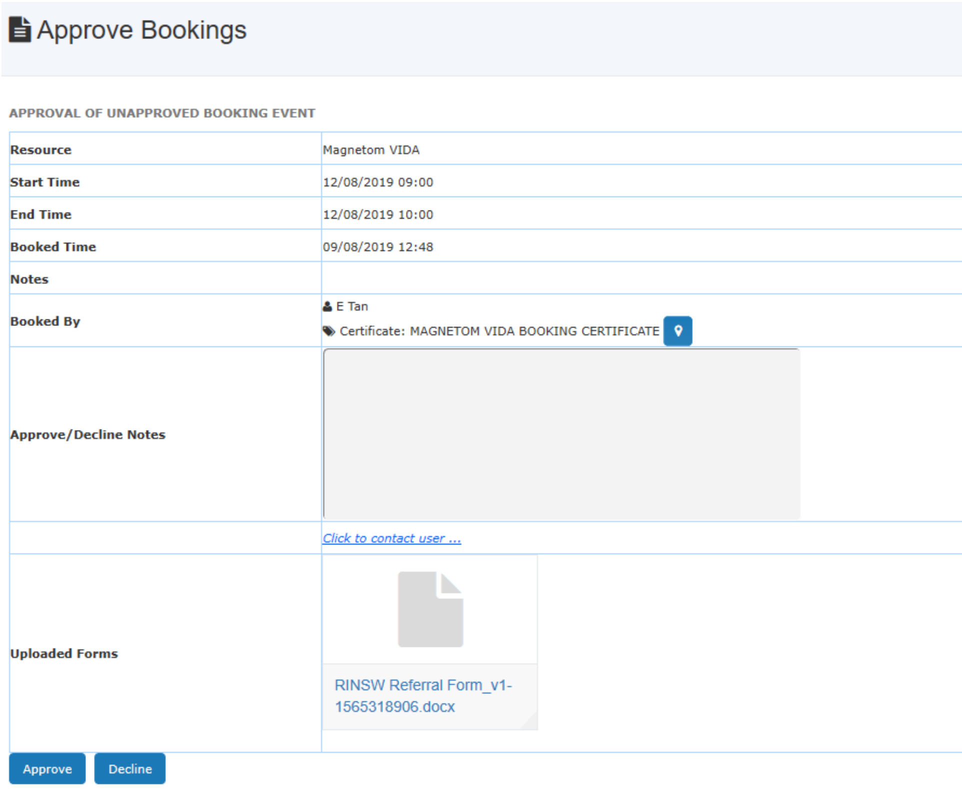
5.4 Resource Booking Forms

A booking form can be set to record additional data from a booking session. You can set up up to 5 booking forms. The forms can be set as optional, and forms can also be uploaded on the booking calendars.

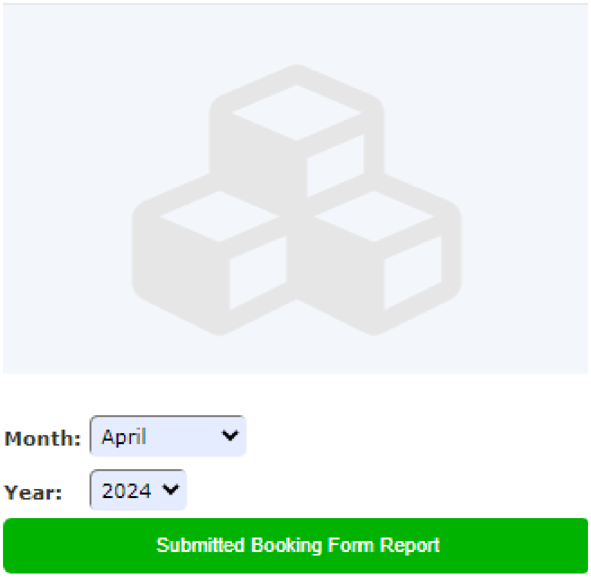
For example, setting a booking form URL will direct the user to an off-site form.
As another example, ticking the Form Upload will allow the user to upload a form instead of going through a URL.



Staff will need to validate the uploaded forms before granting the booking.



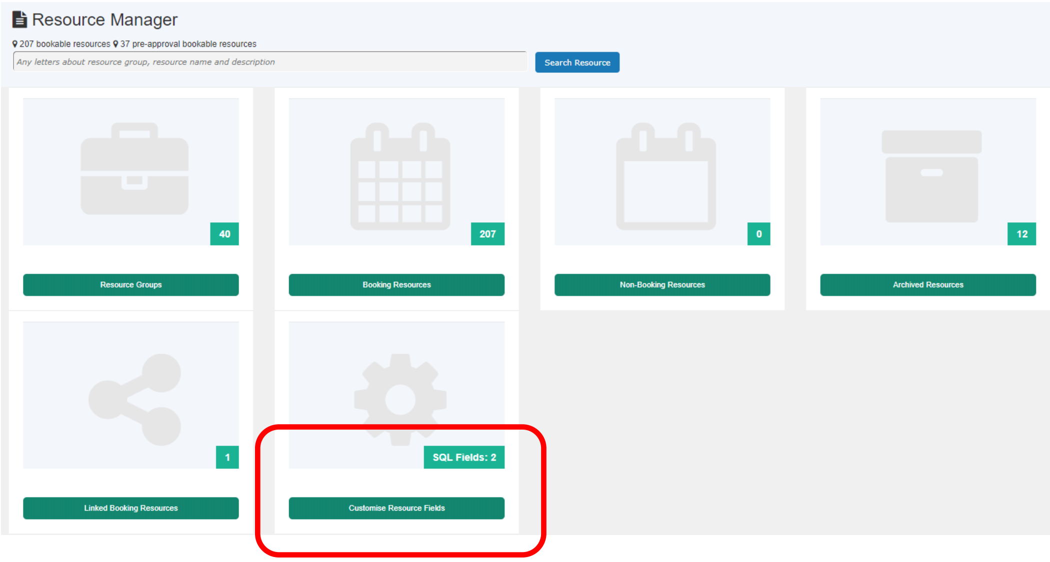
Staff can access all the booking forms in ***Utility->Report Manager->Submitted Booking Form Report.***



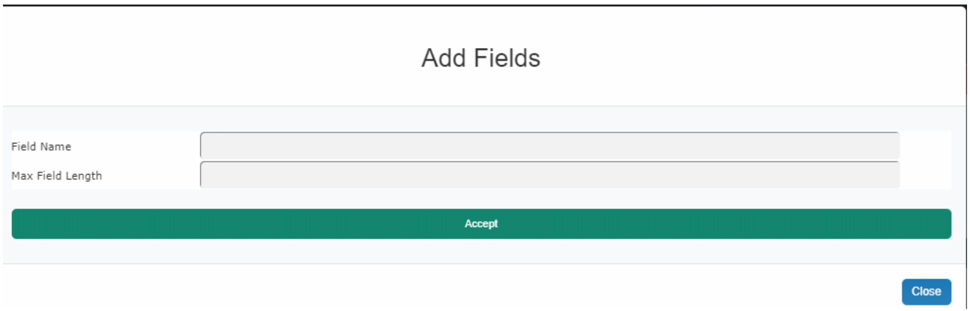
5.5 Customise Resource Fields

You can add new fields to a resource to suit your needs.
Step 1: Add new customised fields

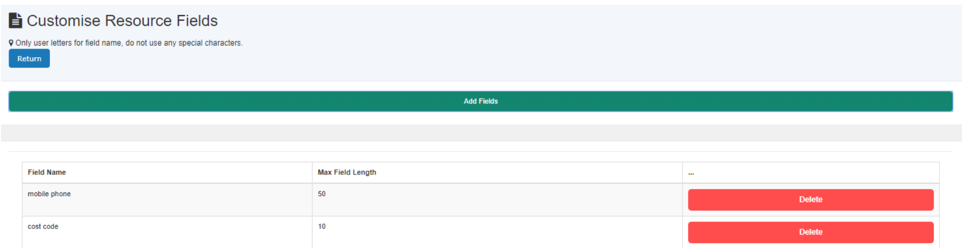
Go to the Resource Manager and click on Customised Resource Fields to add new fields.



You will need to enter a field name and the length of field (max number of characters). Please use letters and digits only.

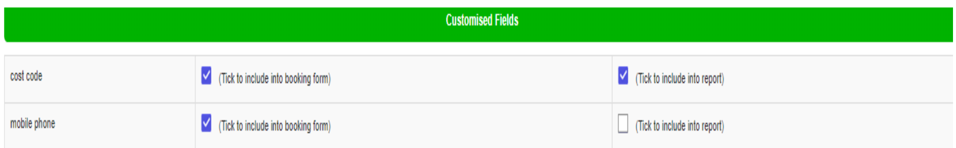


Also, you can delete them at any time if they are not in use.



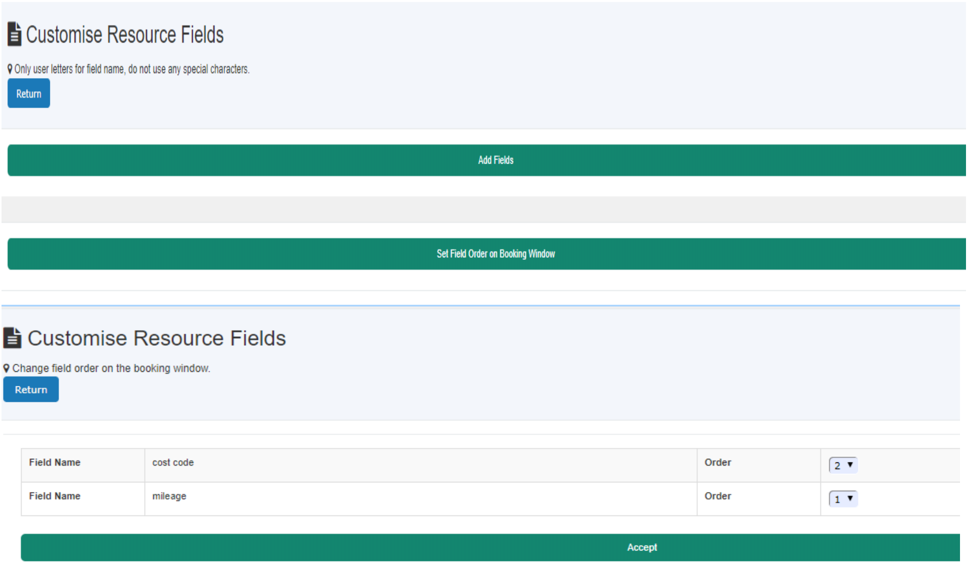
Step 2: Add custom fields to Resources

You will need to add the custom fields to the resource booking form and resource report. This involves checking the box that confirms whether to include it.



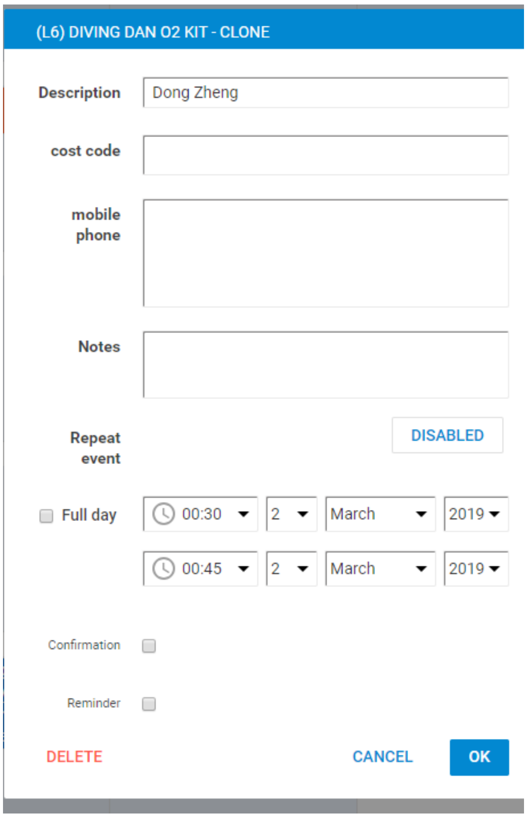
Step 3: Change the customised field order on the booking window

You can change the custom fields order. Click on “Set Field Order on Booking Window” button to choose the order they appear in.



5.5.1 *Customised Resource Fields on Booking Calendar*

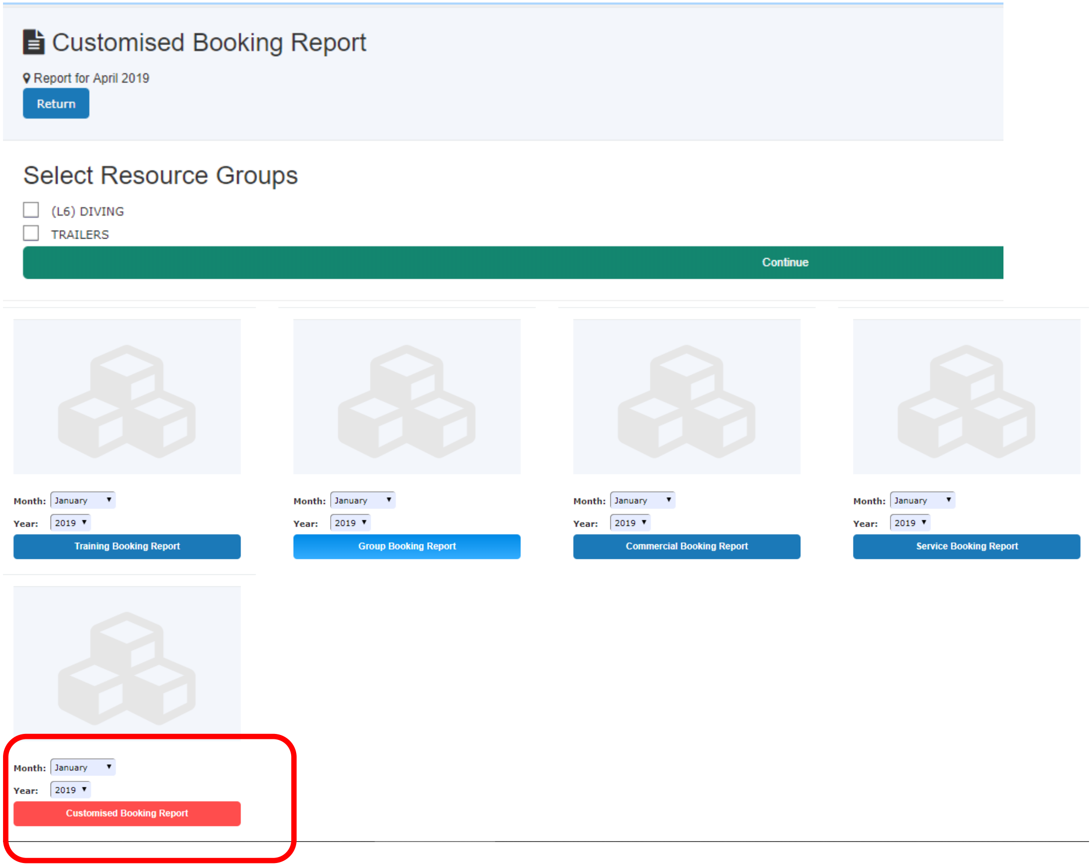
Customised fields will show up depending on resource settings. Please note that all customised fields are compulsory. Without data entry, a booking won’t be accepted.



5.5.2 *Customised Resource Fields on Report*

In the Report Manager, a new report tile will be added for each resource which has the customised fields setting enabled. Standard reports remain unchanged.

ACLS will shortlist resource groups that have customized fields enabled.



With customized booking reports, the custom field will be added to the monthly report. You can choose to export the data to Excel..

Resource	Resource Group	Booking Type	User	Type of Researcher	Supervisor	Account	School/Org	cost code	mobile phone	Start Time	End Time	Booked Hours	Booked On	Notes
(L6) DIVING DAN O2 Kit - Clone	(L6) DIVING	Operation Event	Dong Zheng	Academic	Philip Lawrence	Internal Account	Faculty of Science, UTS	1234	5679	25/02/2019 00:00	25/02/2019 00:15	0.25	21/02/2019	
(L6) DIVING DAN O2 Kit - Clone	(L6) DIVING	User Event	Abanti Barua	PhD Student		Internal Account	C3	1234	56789	25/02/2019 00:30	25/02/2019 01:15	0.75	23/02/2019	
(L6) DIVING DAN O2 Kit - Clone	(L6) DIVING	User Event	Alisha Deo	Hons Student	Maiken Ueland	Internal Account	Faculty of Science, UTS	1234	5674df	25/02/2019 01:30	25/02/2019 01:45	0.25	24/02/2019	
(L6) DIVING DAN O2 Kit - Clone	(L6) DIVING	Operation Event	Dong Zheng	Academic	Philip Lawrence	Internal Account	Faculty of Science, UTS	1234	5678	26/02/2019 00:00	26/02/2019 00:15	0.25	21/02/2019	
(L6) DIVING DAN O2 Kit - Clone	(L6) DIVING	User Event	Abanti Barua	PhD Student		Internal Account	C3	564	987	26/02/2019 00:30	26/02/2019 04:00	3.5	23/02/2019	
(L6) DIVING DAN O2 Kit - Clone	(L6) DIVING	Operation Event	Dong Zheng	Academic	Philip Lawrence	Internal Account	Faculty of Science, UTS	1234	5678	27/02/2019 00:00	27/02/2019 00:15	0.25	21/02/2019	
(L6) DIVING DAN O2 Kit - Clone	(L6) DIVING	User Event	Alexander Solntsev	Academic	Michael Cortie	Internal Account	MaPS	12	56	27/02/2019 00:30	27/02/2019 00:45	0.25	23/02/2019	- changed by staff: Dong Zheng - changed by staff: Dong Zheng
(L6) DIVING DAN O2 Kit - Clone	(L6) DIVING	User Event	Anh Ly	PhD Student	Milos Toth	Internal Account	MaPS	wer	56734	27/02/2019 01:00	27/02/2019 01:15	0.25	24/02/2019	- changed by staff: Dong Zheng
(L6) DIVING DAN O2 Kit - Clone	(L6) DIVING	Operation Event	Dong Zheng	Academic	Philip Lawrence	Internal Account	Faculty of Science, UTS	1234	567810	28/02/2019 00:00	28/02/2019 00:15	0.25	21/02/2019	
(L6) DIVING DAN O2 Kit - Clone	(L6) DIVING	User Event	Ahmad Yusri Mohd Yusop	PhD Student		Internal Account	Faculty of Science, UTS	12	3434	28/02/2019 00:30	28/02/2019 02:00	1.5	23/02/2019	- changed by staff: Dong Zheng - changed by staff: Dong Zheng
Total										**7.5**				

Please note that vehicle charge capping is not implemented. You will need to export the data to Excel for further data processing.

Custom field reports are compatible with the Reports By Any Period ACLS setting.

5.6 Access Group Definition

The ***Access Group Manager*** defines levels of access. There are 8 *generic* groups pre-defined in the system:

- System Administrator Group
- Administrative Staff Group
- Manager Group
- Equipment Supervisor
- General Staff Group
- Supervisor Group
- User Trainer Group
- User Group

Each *generic* group can be used to create many sub-groups for different booking settings.

Each group has the following attributes:

- Group name
- Maximum hours per day
- Maximum days per period (calendar days)
- Maximum hours per period
- Booking availability start time for each day
- Booking cutoff end time for each day
- Booking end time offset for each day. If set to zero, ACLS will set a check box on the booking calendar to represent the offset period on the booking end time
- Booking cancellation: Whether the bookings are allowed to be cancelled, at least one day in advance.
- Weekend booking: Whether weekend booking is permitted
- Group code: A unique group ID
- Group of Privilege: Category of access e.g user, staff.

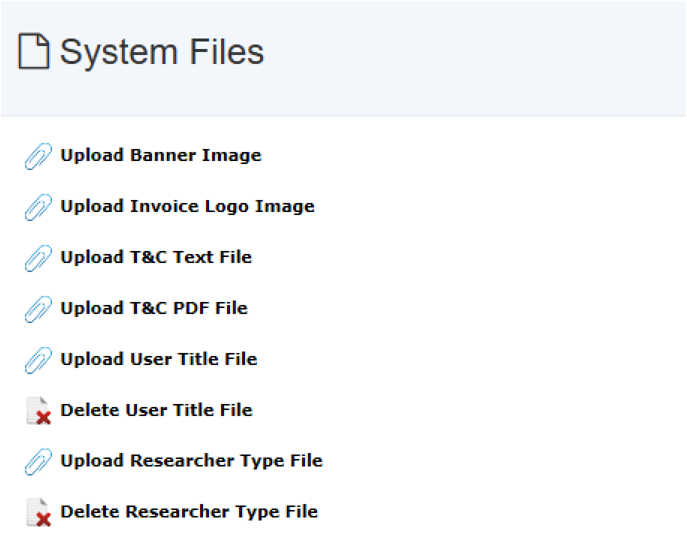
Due to resource constraints, there are many situations where a lab would need to appoint a PhD or an experienced user as a resource trainer. In this case, the User Trainer Group is available for appointing a general user to the role of resource trainer.

5.7 Upload System Files

In this section, you can upload the following files:

- Banner image
- Logo image for invoice statement
- Terms & Conditions text file
- Terms & Conditions PDF file
- Customized user title text file
- Customized type of researcher text file

- Customized form type text file (CMCA only)



Expanding on the user title, a user title text file would look like this:

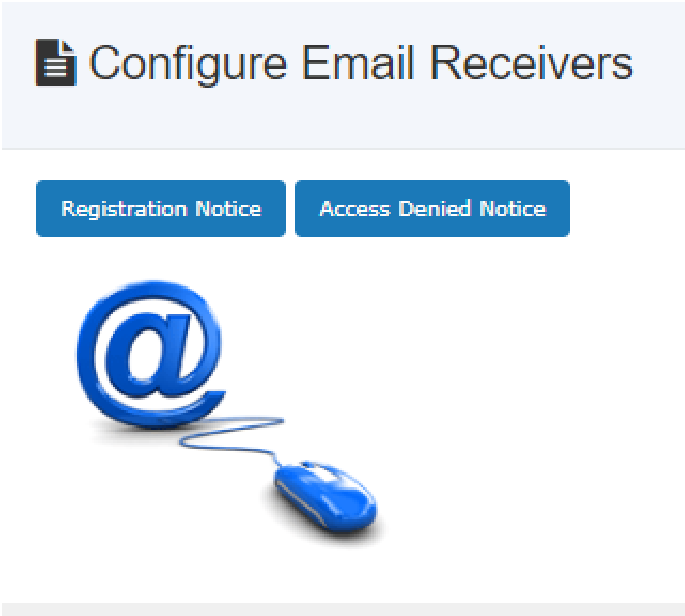
- Undergrad. Student
- Hons Student
- Visiting Researcher
- Masters Student
- PhD Student
- Postdoc
- Research Assistant
- Professional Officer
- Academic
- Others

5.8 Configure Email Receivers

You can customize the email mailing list for the following:

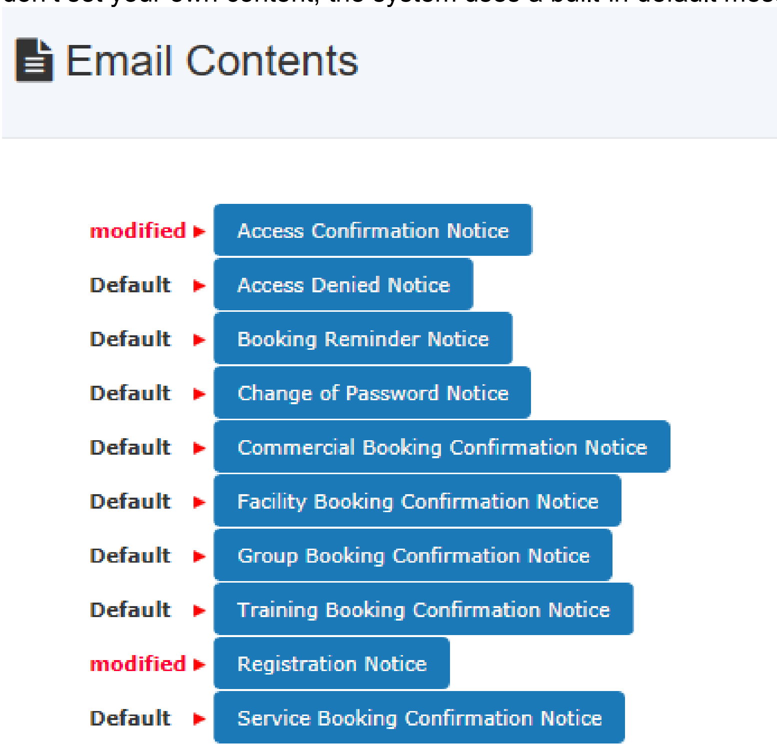
- Online registration requests
- Budget manager notifications
- Access denied notifications
- Training and support notifications

By default, these notices go to the user who submits it, and the ***Contact Us*** email.



5.9 Configure Email Response Contents

You can customize the contents of an email notification to suit your lab environment. If you don't set your own content, the system uses a built-in default message.



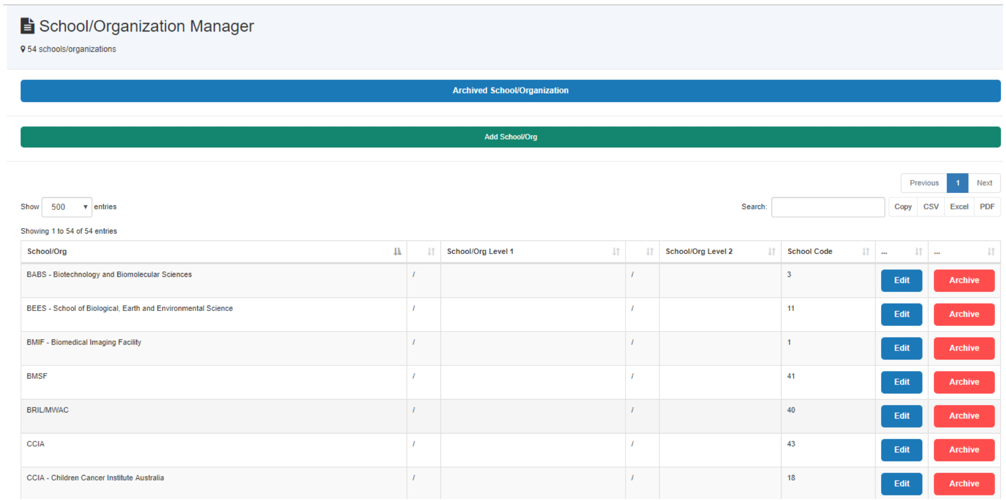
Modified content is clearly identified, while the rest are labelled as default. The system provides ***Preview*** and ***Default*** buttons so you can see the difference. If you erase a notification's modified contents, the system reverts the notification back to default settings.

5.10 Configure School/Org Structure

ACLS supports up to 3 levels of a school/org structure. For example, you can set up DVCR/MWAC/BMIF to indicate the three levels of DVCR > MWAC > BMIF. By doing so, you can deploy an org structure diagram and set up analytical tools for monitoring user population and distribution.

For example, you can set up a hierarchy of University-A > Faculty-B > School-C. If you need to rename a school/org, this change will apply to all instances in the school manager.

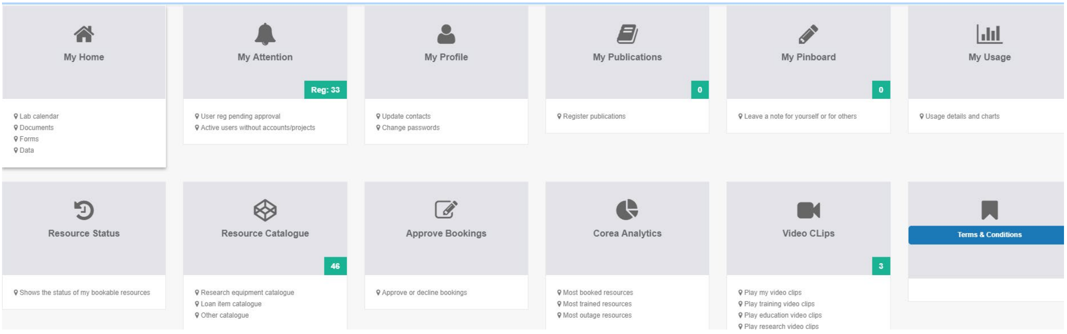
To disable an unwanted school or organisation, you can click on the Archive button.



6 Operating ACLS

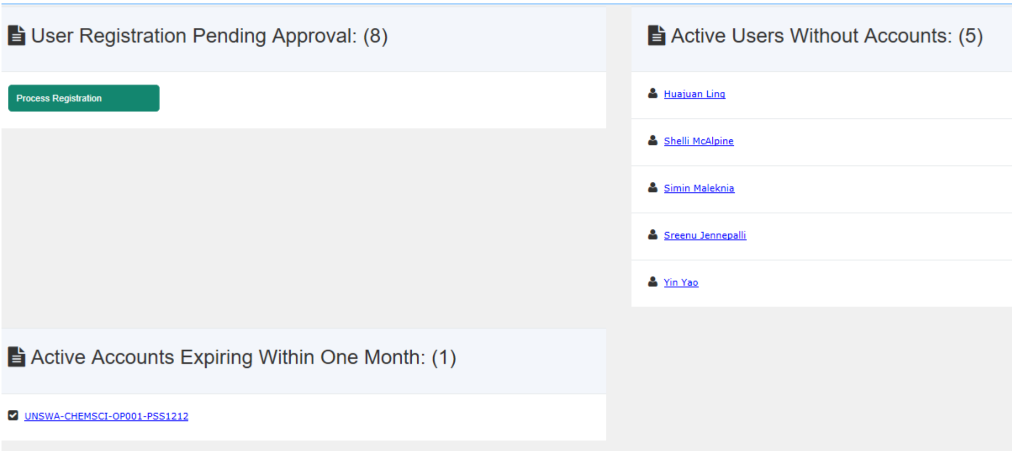
6.1 Dashboard

Depending on the access group defined in your profile, the ***Dashboard*** offers a wide range of information about your work in ACLS, as well as quick access to resource status and other functions.



The dashboard tiles are as follows:

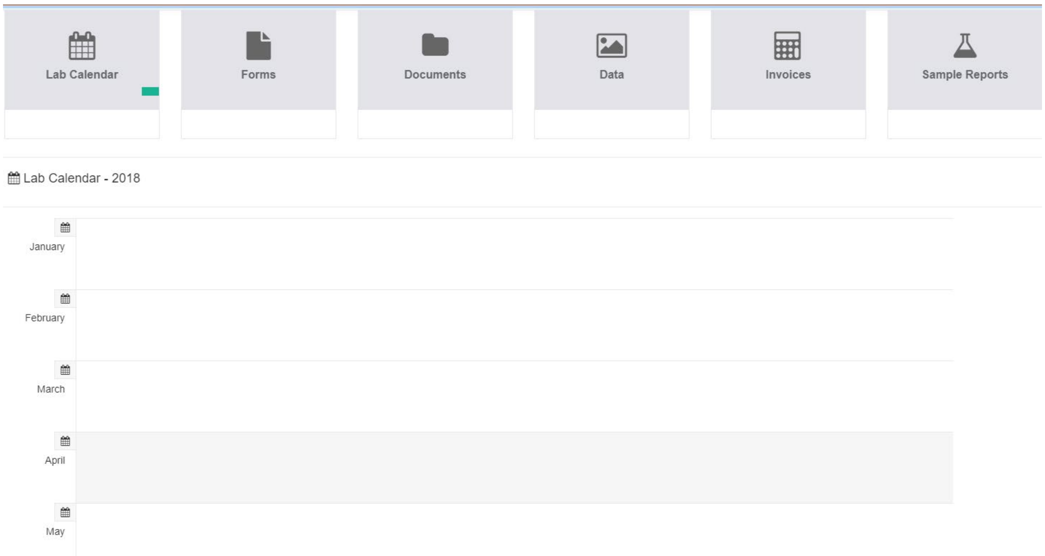
- My Attention (Admin Only):



Displays the following admin related notices:

  - User registrations pending approval
  - Active users without an account
  - Active accounts expiring within one month
  - Projects expiring within one month

- My Home:

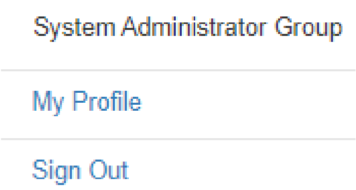


Displays the following sub sections:

- Lab Events: Lists events in the current month. You can click on an individual month to view monthly events
- Access Documents: Access to general documents (policies, meeting minutes, etc.), and resource related documents (training materials, etc.)
- Access Forms: Access to user submitted forms, such as induction forms, OHS forms, etc.
- Access Experiment Data: Depending on the ACLS configuration, you may be able to access experiment data through this FTP service
- Access Invoices
- Access Sample Job Reports
- Access Sample Job Summary

- My Profile:

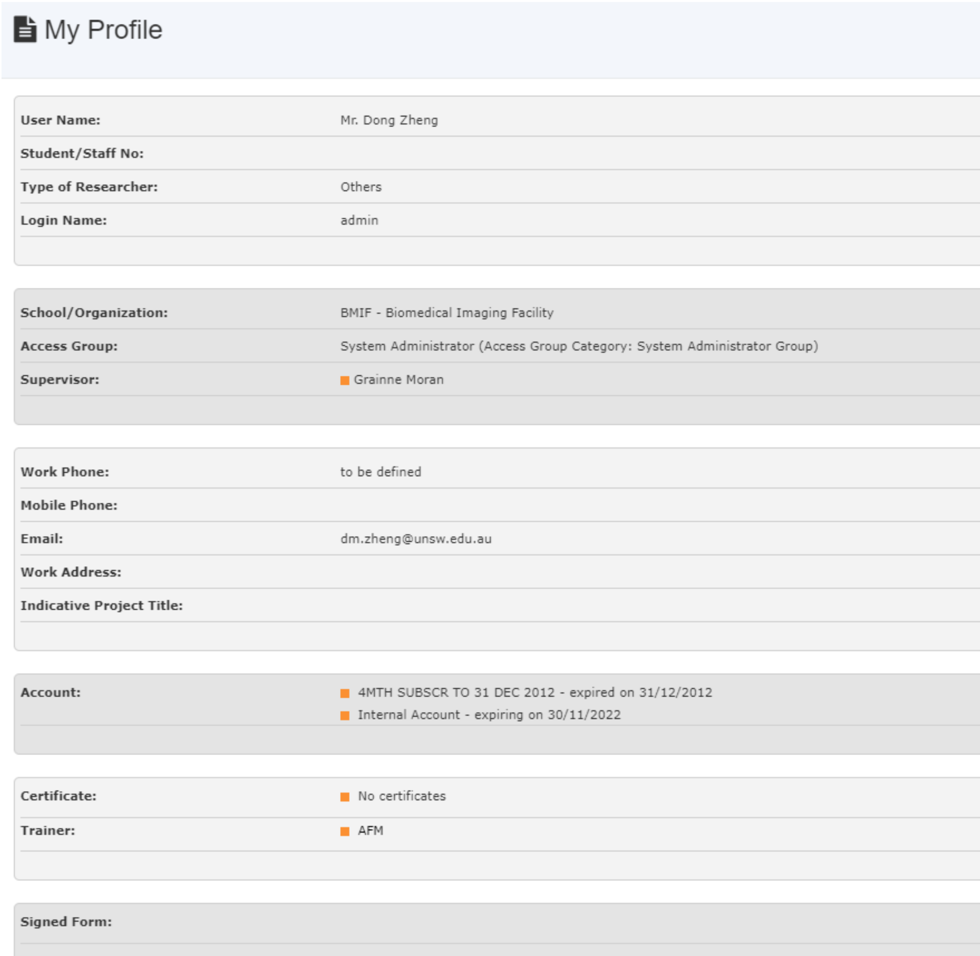
Your user details can be seen here. You can change your password and update your contact details. There are two ways to access ***My Profile***, via the ***Dashboard***, or via the user photo next to the Logout option.



Fields given in My Profile are as follows:

- User Name
- Student/Staff No.
- Type of Researcher
- Login name
- School/Organization
- Access Group
- Supervisor

- Work Phone
- Mobile Phone
- Email
- Work Address
- Indicative Project Title
- Account
- Certificates
- Trainers


My Profile

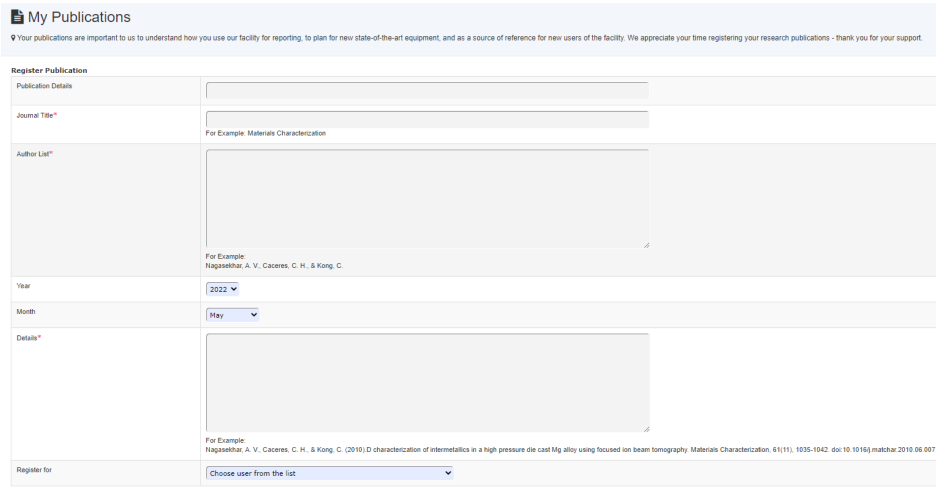
User Name:	Mr. Dong Zheng
Student/Staff No:	
Type of Researcher:	Others
Login Name:	admin
School/Organization:	BMIF - Biomedical Imaging Facility
Access Group:	System Administrator (Access Group Category: System Administrator Group)
Supervisor:	Grainne Moran
Work Phone:	to be defined
Mobile Phone:	
Email:	dm.zheng@unsw.edu.au
Work Address:	
Indicative Project Title:	
Account:	4MTH SUBSCR TO 31 DEC 2012 - expired on 31/12/2012 Internal Account - expiring on 30/11/2022
Certificate:	No certificates
Trainer:	AFM
Signed Form:	

- My Publication:

  For each lab, unit, facility and institute, publications serve as a critical element for grant applications, as well as providing evidence of service excellence.

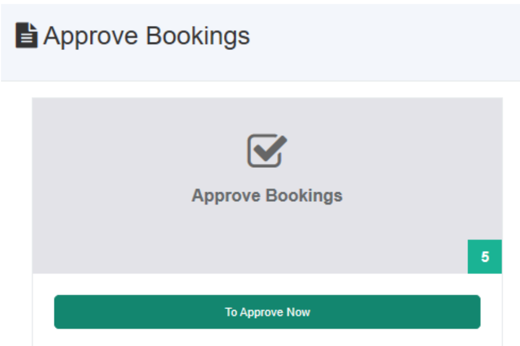
  Publication data is listed in the following points:

  - Publication ID
  - Journal Title
  - Author List
  - Year
  - Month
  - Details



Staff can register publications for any user. When done, you can see your registered publications on the ***Publication*** page.

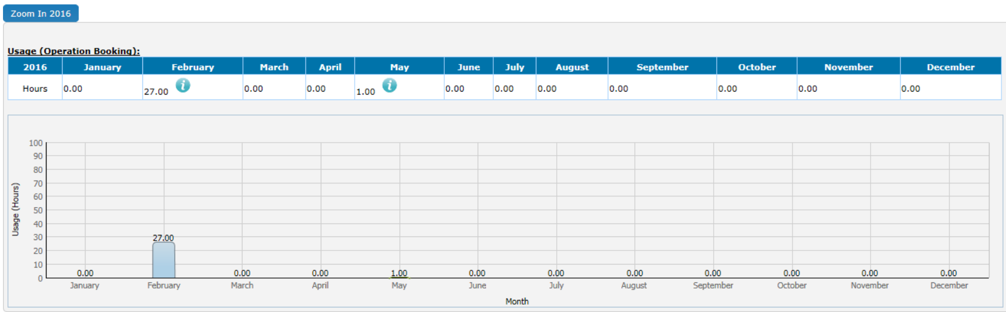
- Approve Bookings:

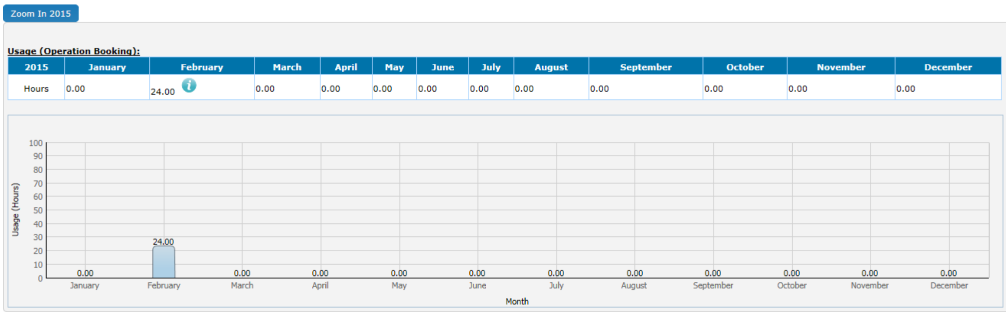


  - Displays bookings pending approval, if the pre-approval booking setting is enabled.
  - Available to trainers only

- My Usage:

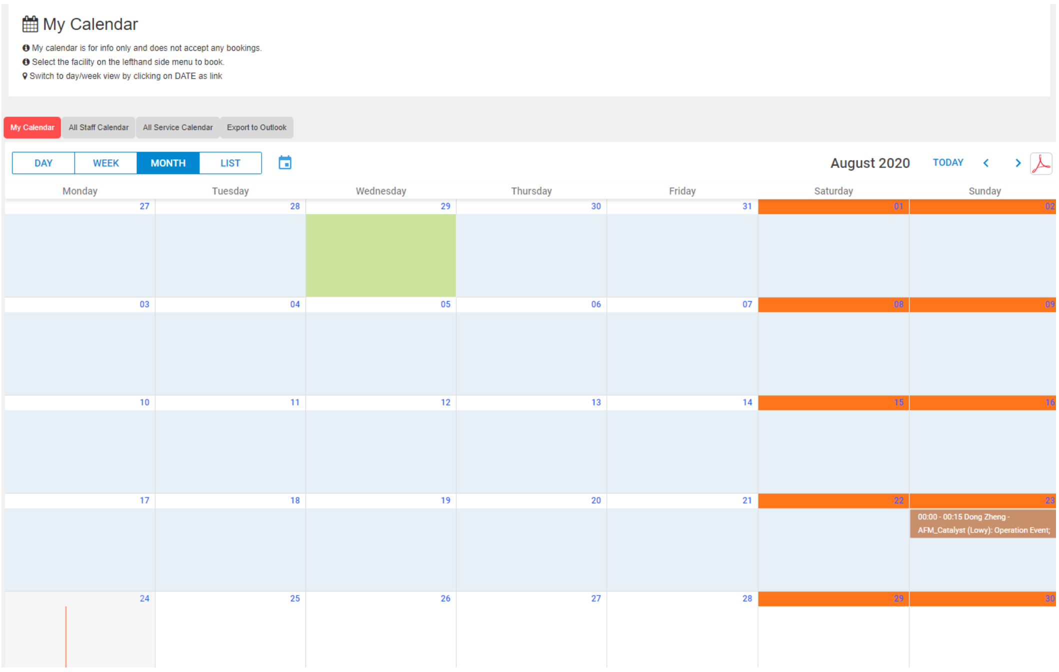
This section provides data analysis on your resource booking statistics. It lists both table and bar chart summaries for each resource you use.





6.2 My Calendar

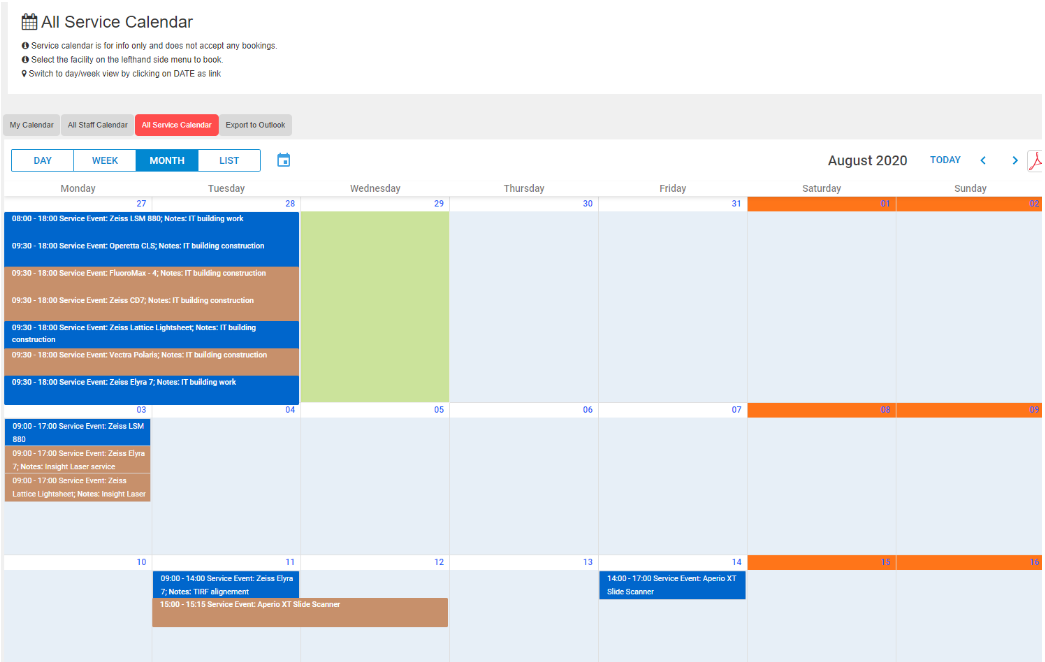
My Calendar gathers all your resource bookings onto a single page.



Staff members can view the calendar of any user.

The ***All Staff Calendar*** shows all staff bookings on one calendar. It can help staff and managers identify free time for staff meetings.

The ***All Service Calendar*** lists all service bookings across all resources on one calendar. You can also view service bookings for a specific resource by selecting the resource from the dropdown list.



6.3 Make Bookings

Click on the ***Booking Resources Tab*** from the ACLS navigation menu. The resource list will show up with selections that depend on your certification status. For general users, you see the resources that you are certified to access.

- Sorted by resource group:

This format groups up resources by their resource group.

- My Calendar
- Lab and holiday calendar
- Staff Roster Calendar
- Resource Trainers
- Resource Timeline Calendar
- My Bookable Resources
  - AFM
  - FIB
  - SEM
  - TEM
  - TOOLS

- Sorted by individual resource:

This format displays a list of all resources regardless of group.

My Calendar

Lab and holiday calendar

Staff Roster Calendar

Resource Trainers

Resource Timeline Calendar

My Bookable Resources

› Analysis Computer 2

› Analysis Computer 3

› Analysis Computer 4

› inVia 2 Raman (532, 633, 785, 830nm)

› inVia Raman (325, 442, 514nm)

› Lambda 1050 UV/Vis/NIR

› Lambda 365 UV/VIS

› Spectrum 100 FTIR

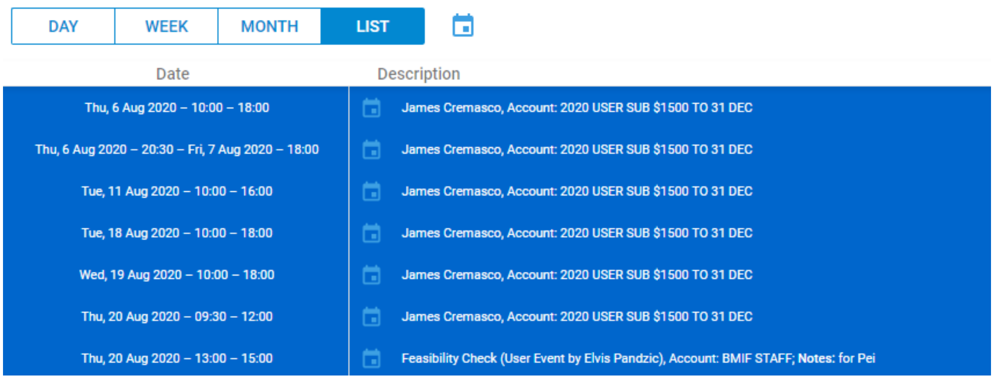
› Spectrum 3 MIR/FIR

› Spectrum Two FTIR

Staff members can make bookings of the following categories: Operation, User approval bookings, Training, Group bookings, Commercial, Service. General users can only make Operation Bookings, and they can only book for themselves.

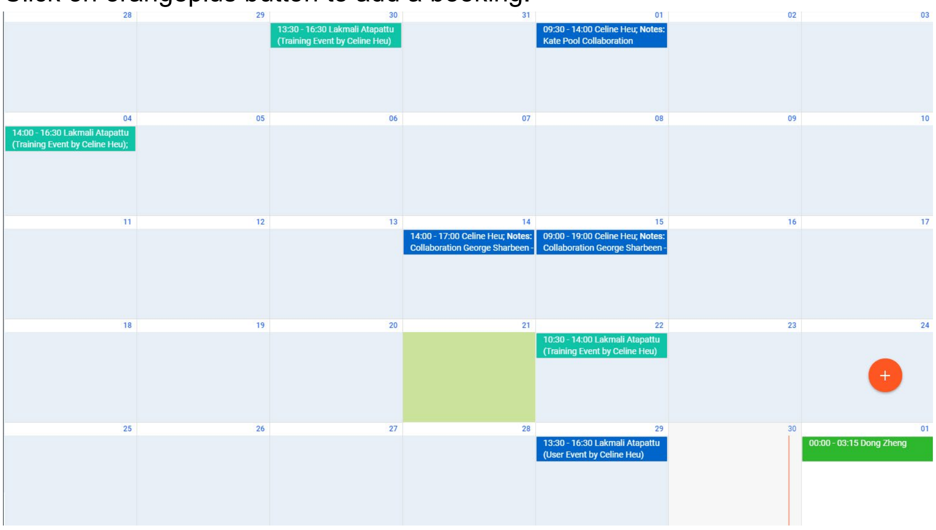
6.3.1 Operation Booking (unassisted booking)

The Operation Booking is used to book events for yourself. The colour scheme gives you a quick overview of the different types of bookings currently in place. Dates in the past are coloured blue, and you are not permitted to make bookings the past. You can switch the calendar between day, week, and month views by clicking on the **Date** button. The **List** view shows you a summary of bookings made in the selected month.

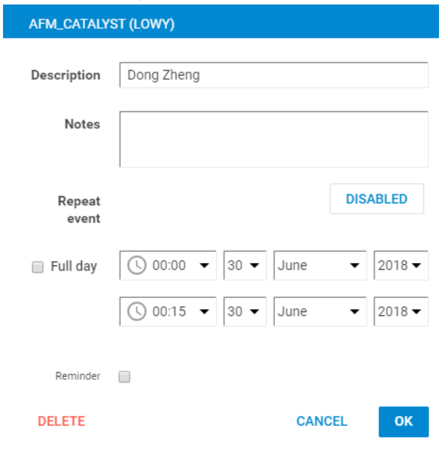


You can print the calendar as a PDF by clicking on the **PDF** button. You can create PDFs of any view. If there are too many bookings on the calendar page, you can go to **Filter By** to view individual user bookings.

- Add bookings:
  - Click on orangeplus button to add a booking.



  - Alternatively, click on a date on the calendar to add a booking to that day.

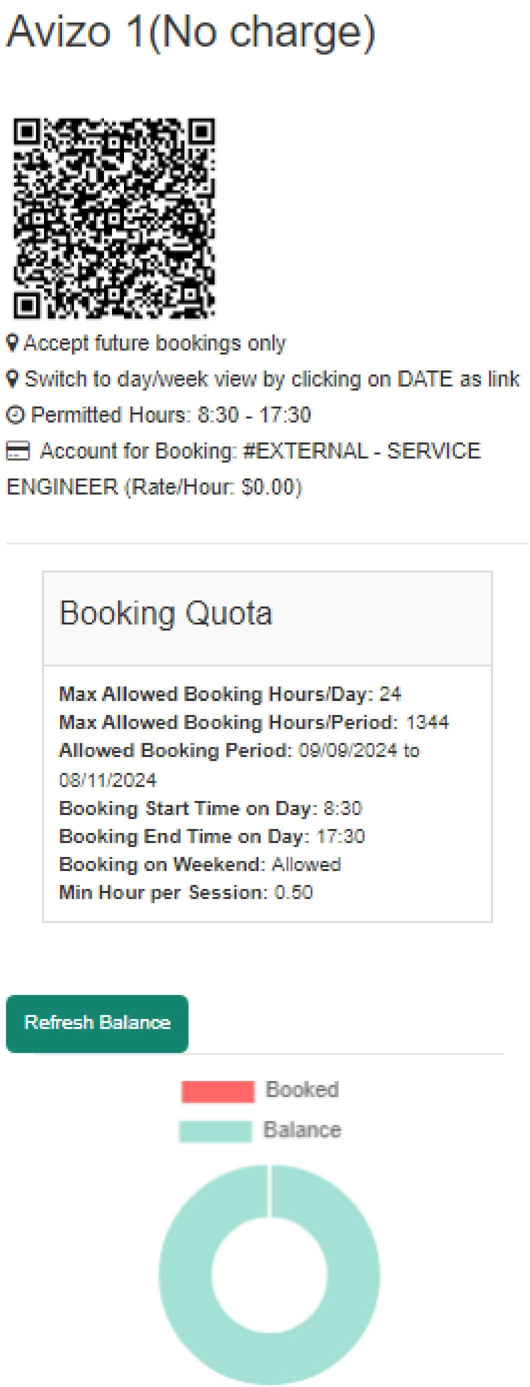


  - Click on ‘OK to save the booking.

- Each booking tool comes with its own template, but the method of creating, editing, and saving bookings is the same.

6.3.2 Booking Quota

Side panel provides resource and booking quota details. Staff and users could check the booking quota for the permitted quota settings.



6.3.3 Information Panel

Provides resource details, such as resource group, location, and trainers.

Leica SP5 WLL gSTED

Resource Group: LOWY

Description: The Leica TCS SP5 equipped with a pulsed white light laser (WLL), gated HyD detectors and cw gated STED is an inverted confocal laser scanning microscope. It is designed for high-resolution fluorescen

Specifications:

Location:

Trainers: Alex Macmillan; Renee Whan; Iveta Slapetova; Ales Benda; Richard Francis; Michael Carnell; Lev Lewis; Elvis Pandzic; Florence Tomasetig; Celine Heu; Ephrem Sitiwin; Sandra Fok; Oliver Looker;

- Information Panel – Calendar settings:

ACLS provides ways to customize your calendar.

  - Calendar View: The default calendar view. Either weekly view or monthly view
  - Calendar Popup: switch between single click or double click when opening the booking event window
  - Calendar background color

Calendar Settings	
Calendar View	○ Week
	● Month
	Define the calendar view when accessing the calendar, either week or month view.
Calendar Popup	● Single Click
	○ Double Clicks
	Define how calendar booking box is popped up, by single click or double clicks on the calendars.
Calendar Background	○ Dark
	● White
	Define the calendar background colors, dark or white.

- Information Panel – User contacts:

Staff and users can check the contact details of the booking's user, if they need to contact the user for notices such as a change of bookings or another arrangement.

- Information Panel – Booking colour codes:

Lists the colour guide for different booking types.

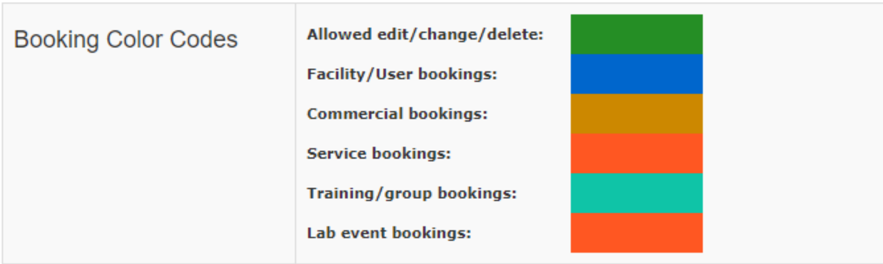
Green: Allowed to edit/change/delete booking

Blue: Facility/User booking

Brown: Commercial booking

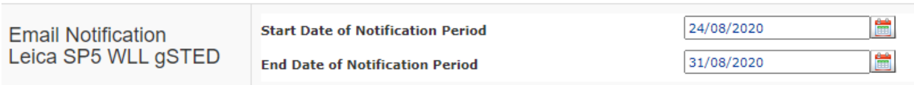
Red: Service Booking, Lab event booking

Teal (light blue): Training/Group booking



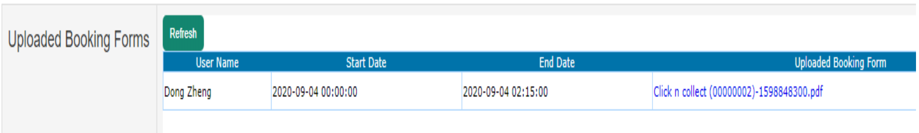
- Information Panel – Email notifications:

  For popular resources, you can set up an email notification when a booking is cancelled so that you are alerted when it becomes available.



- Information Panel – Uploaded booking forms:

  This is only available if the resource has the booking form option enabled. Staff can access any uploaded forms. Users can only access their own submitted forms. The access button is positioned above the calendar page.



6.3.4 User/Approve Booking

This booking tool is only available for staff. It is used to book for other users excluding staff members, and to approve any pending bookings. When you click **Save**, the system sends a booking confirmation notice to the booked user and the staff member who has made the booking.

6.3.5 Training Booking

This booking tool enables staff to book a training session for users. Note the differences:

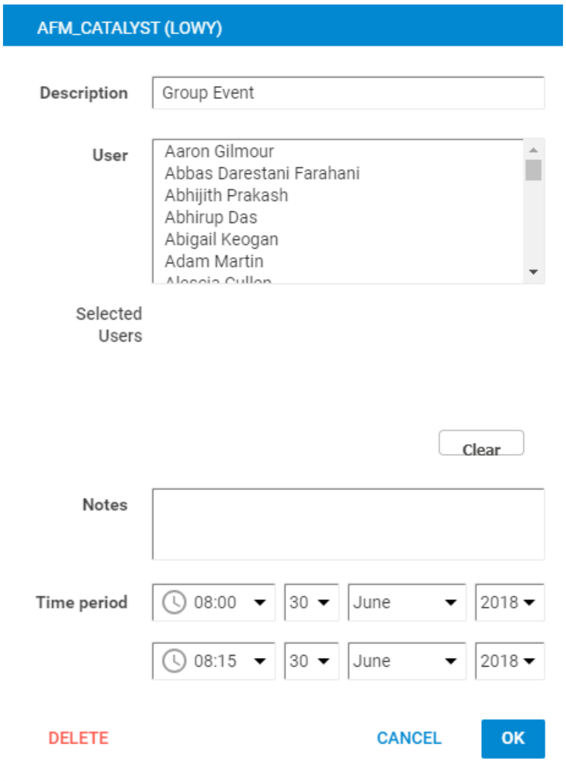
- A user booking is regarded as a normal operation booking (like a Resource Booking)
- A training booking is listed as training in the report.

When you click **OK**, the system sends a booking confirmation notice to the booked user and the staff member who has made the booking.

6.3.6 *Group Booking*

This booking tool allows staff to book events or sessions for multiple users at once. When you click **OK**, the system sends a booking confirmation notice to the booked users and the staff member who has made the booking.

Note: Press **Ctrl** key on Windows PC or **Command** key on MAC when selecting the users. This allows you to select multiple users at once.



6.3.7 *Commercial Booking*

The Commercial booking is only available to staff members and is used to book a resource for special commercial operations.

6.3.8 *Service Booking*

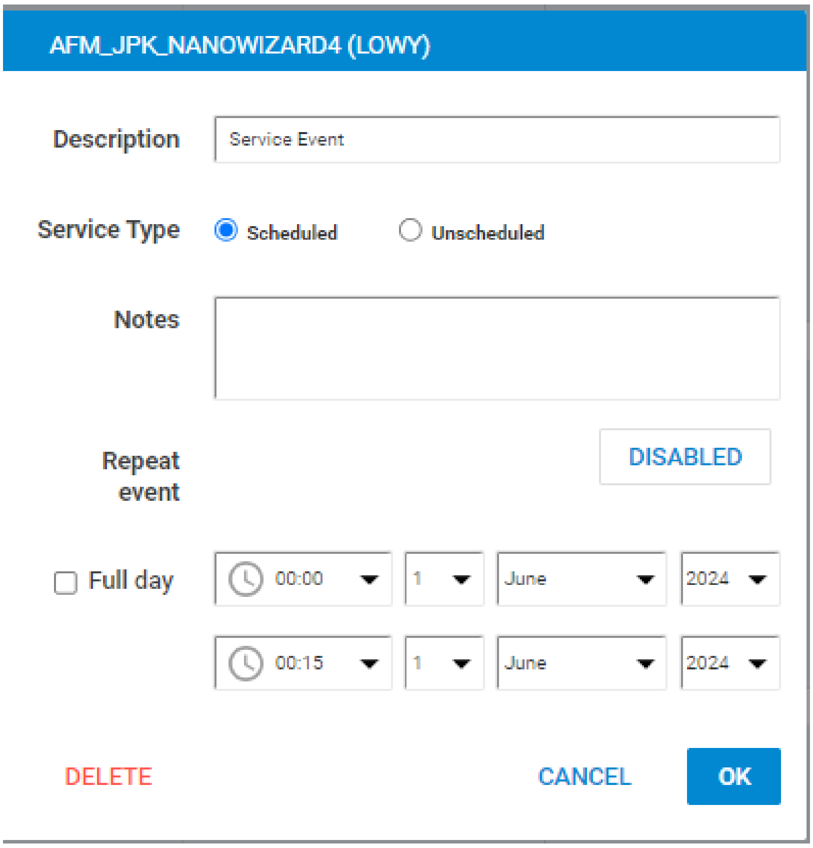
The Service booking is only available to staff members, allowing them to book resources when they require maintenance or service. A service booking will overwrite any user bookings. Email notifications will be automatically sent to the users of any cancelled bookings.

To overwrite a current booking, you will need to create a new service booking that takes place during the same time as the current booking. Press **Ok** to save the service booking, and the system will automatically remove any conflicting bookings.

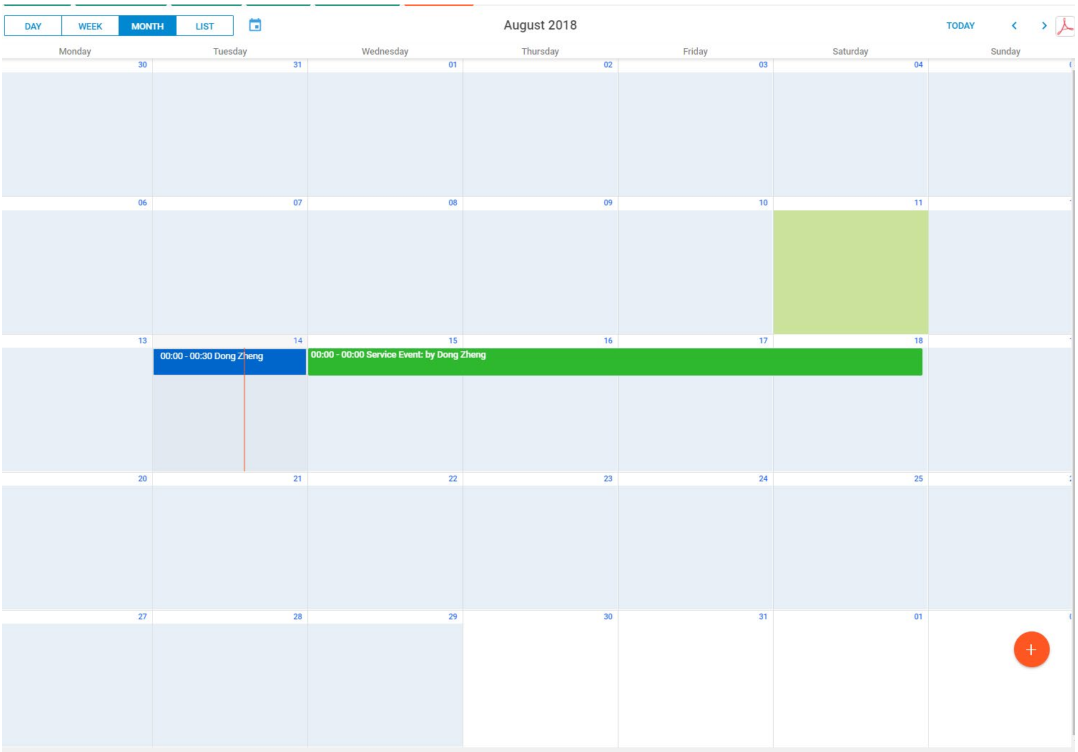
Alternatively, drag the booking box to the timeslot that you wish to make the service booking, and the system will replace those earlier bookings when you click on **Ok** button.

The service booking tool includes two types of service bookings:

- Scheduled: For planned or scheduled maintenance, service, etc
- Unscheduled: For unexpected and sudden resource breakdowns that require servicing

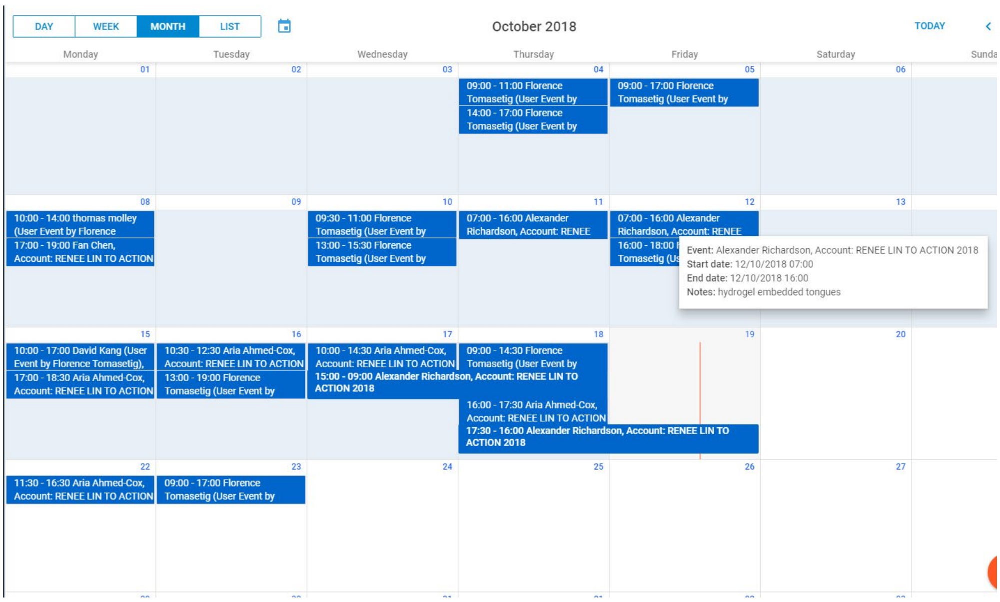


All service bookings are open for change, both in the past or future. They are coloured green to indicate that you can make changes to them or delete them.

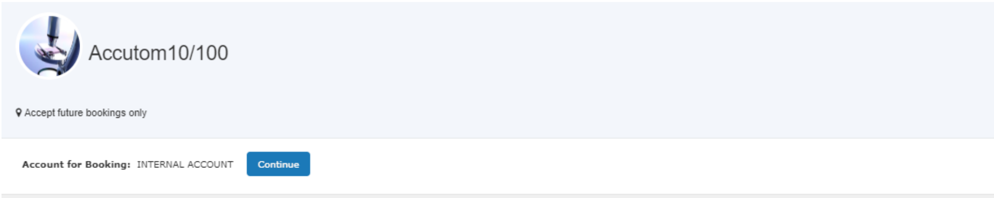


6.3.9 Account in Booking Details

Hovering over a booking will also show the account used for the booking.



Regardless of the account number held by the user, the account selection page will always ask the user to confirm before proceeding to the calendar page. Compulsory account selection can be enabled or disabled from the ACLS system settings.



6.3.10 *About Offset Setting behaviour in Calendar*

The offset time booking is a shortcut function for the specific use case of booking a resource after business hours have closed.

For example, say that business hours are from 9am to 5pm, and the offset time is set to 3 hours. When making a booking that ends within the last hour of the standard business hours, activating the offset booking block time feature will block out the instrument bookings for the next 3 hours.

The most common use case for this particular feature would be for blocking out a period of maintenance overnight.

Example 1:

Booking start time	8am
Booking end time	6pm
Offset	4 hours
Description	The offset extends the end time by 4 hours, moving the end time to 10pm.

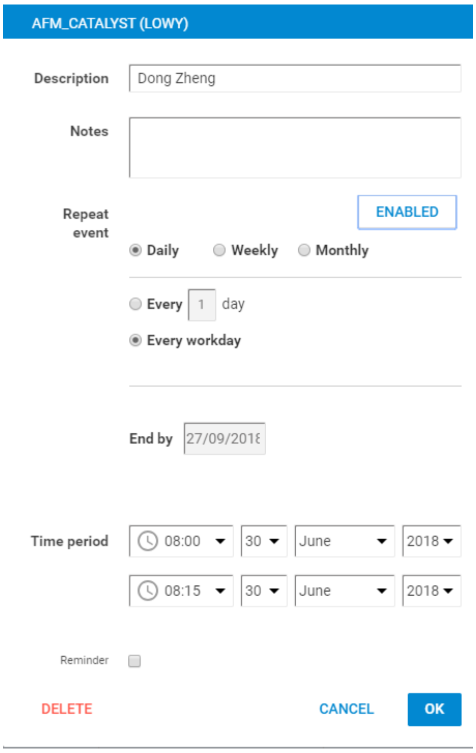
Example 2:

Booking start time	8am
Booking end time	6pm
Offset	10 hours
Description	The offset extends the end time by 10 hours, moving the end time to 4am. However, the offset feature will not let you book an event spanning multiple days, so this booking will fail.

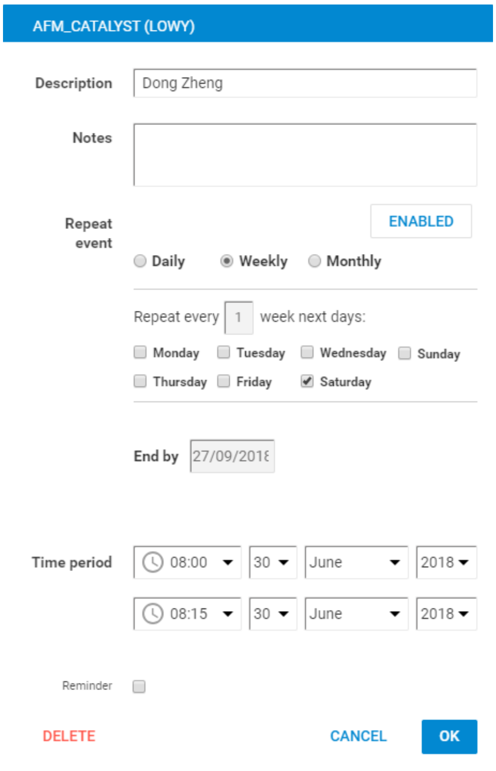
6.3.11 *Operation Repeat Booking*

The availability of repeat bookings depends on your permissions. The options include:

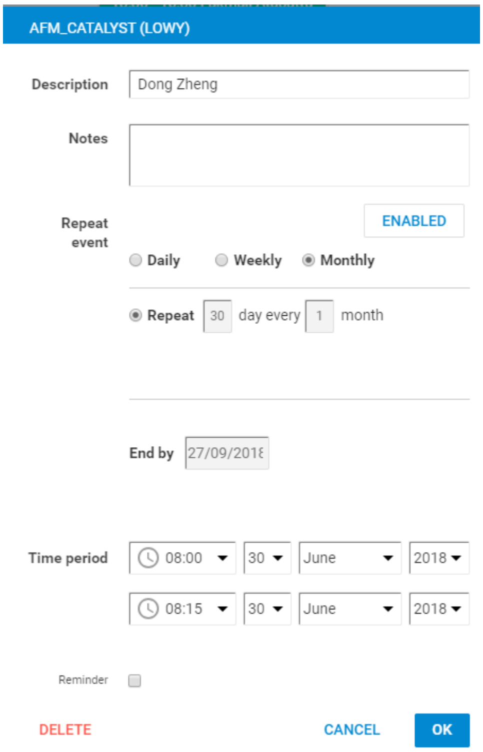
- Recurring daily: This is default option. A booking will be repeated every day according to the created timeframe.



- Recurring weekly: This option is only available if you are permitted to book more than 2 weeks in advance.



- Recurring monthly: This option is only available if you are permitted to book more than 2 months in advance.

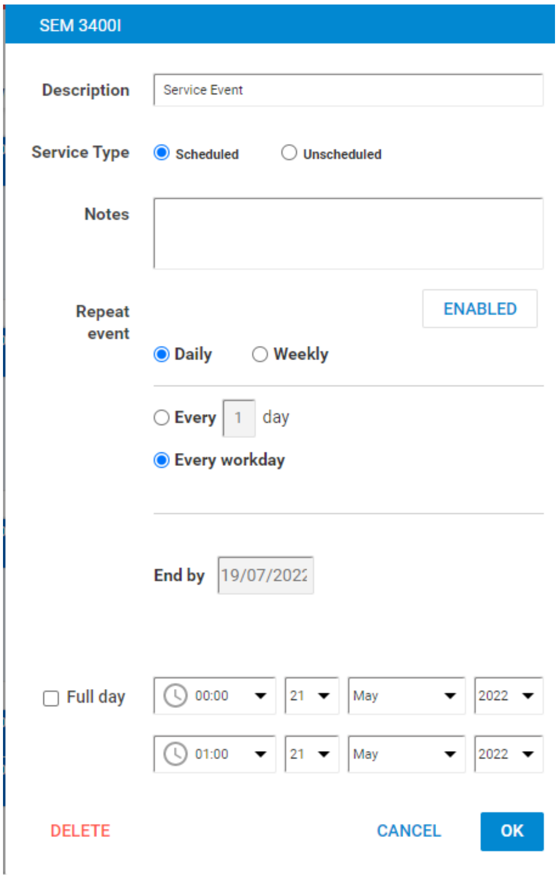


The definitions of a repeat booking per day/week/month work the same way as Outlook.

The "End By" date is automatically set by the system according to max days/period set out in your certificate or access group. However, you can choose to bring it forward to an earlier date.

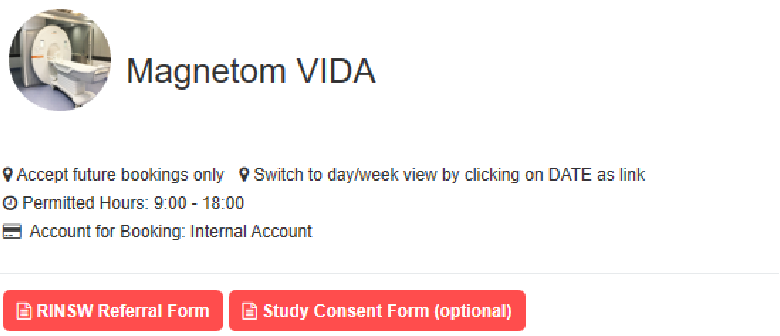
6.3.12 *Service Repeat Booking*

Repeat service bookings operate the same way as the repeat operation booking.



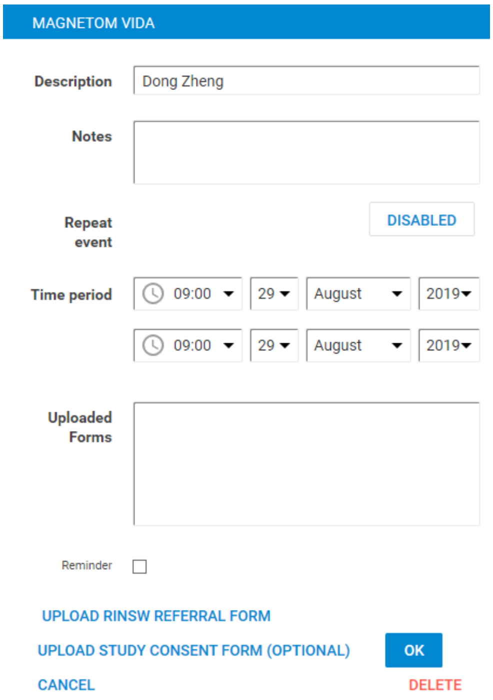
6.4 Booking with Forms

In certain situations, you may need users to submit some forms while booking a resource. For example, the form may be a referral form, a consent form, a sample form, a safety form, etc. After you set up one or more booking forms in ***Resource Manager***, the form button appears on the calendar page

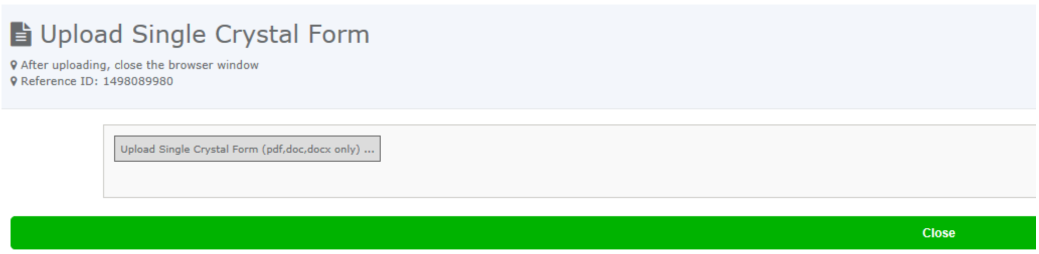


To Attach a Form:

The booking window shows the appropriate form buttons, according to the settings in **Resource Manager.** For example, “Upload Study Consent Form (Optional)”.



Click on **Upload [form name] Form** to upload the form.



6.5 Booking Confirmation

Users are typically allowed to create bookings in the future and cancel them when necessary. However, sometimes users are unable to turn up for their booked session, meaning that the resource is left unused and incurring an opportunity cost.

The Booking Confirmation feature helps combat this occurrence by requiring the user to confirm their booking prior to the event. For example, if the system is set to send a 3-day reminder, the user has to confirm attendance 3 days prior. Confirmation is done through a confirmation URL emailed by ACLS. If the user does not confirm attendance within a timeframe (the day of the confirmation email), the booking will be cancelled.

This feature is optional, though it does increase usage efficiency.

- Enable user booking confirmation

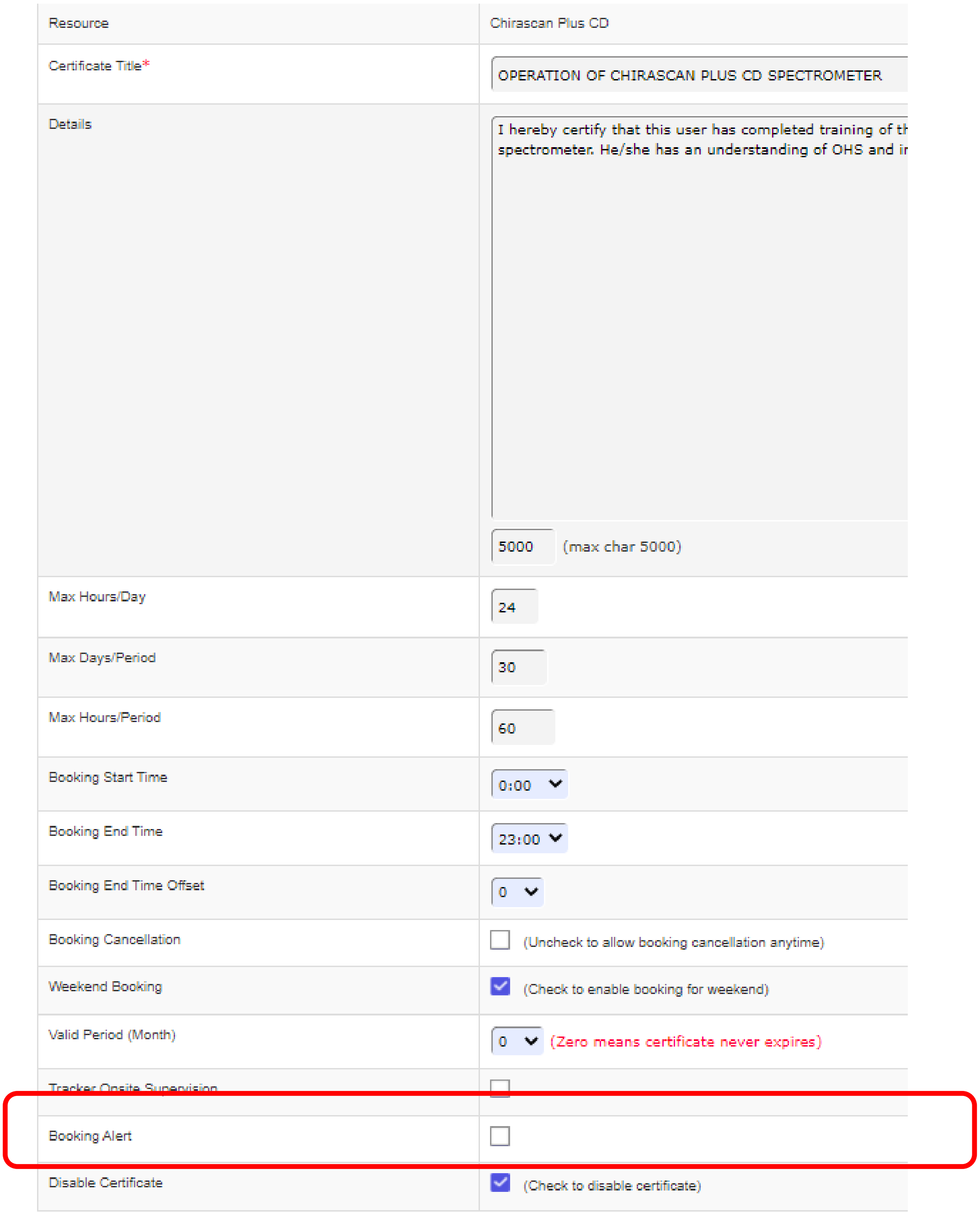
Before you can use this feature, you need to turn it on. Go to ***System Settings*** -> ***Configure System*** to enable the parameter **'Enable User Booking Confirmation'**.

- Set up user confirmation for all users under all training certificates

This allows you to enforce booking confirmations for users underneath all certificates. Go to ***System Settings*** -> ***Configure System***, click on '**Enable Certificate Confirmation**' to enable user confirmation for all certificates, or click on '**Disable Certificate Confirmation'** to disable user confirmation for all certificates.

- Set up user confirmation to each training certificate

This allows you to enforce booking confirmations on a per certificate basis, granting finer control over the specific resources that may need to use this feature. Go to ***Resource Manager***, select a resource to edit. In the resource settings, tick the checkbox titled "Booking Alert".



Resource	Chirascan Plus CD
Certificate Title*	OPERATION OF CHIRASCAN PLUS CD SPECTROMETER
Details	I hereby certify that this user has completed training of th spectrometer. He/she has an understanding of OHS and ir 5000 (max char 5000)
Max Hours/Day	24
Max Days/Period	30
Max Hours/Period	60
Booking Start Time	0:00
Booking End Time	23:00
Booking End Time Offset	0
Booking Cancellation	(Uncheck to allow booking cancellation anytime)
Weekend Booking	(Check to enable booking for weekend)
Valid Period (Month)	0 (Zero means certificate never expires)
Tracker Onsite Supervision	
Booking Alert	
Disable Certificate	(Check to disable certificate)

Additional parameters:

- User Booking Confirmation: to enable or disable confirmation reminders for this certificate
- User Booking Confirmation Days: The amount of days prior to the booking when the confirmation URL is sent.

A reminder email will be sent out with full details of the bookings, including resource and booking time. Two links will be provided: a confirmation link, and a cancellation link. The email contains a reminder that the booking will be cancelled automatically if the confirmation link is not used.

Dear Abhirup Das,

This is a confirmation notice for the following booking:

Booking Resource: Eclipse Ti-E

Booking Start: 12/02/2018 00:00

Booking End: 12/02/2018 00:15

Your booking will be automatically cancelled at midnight unless you confirm the session using the link below.

TO CONFIRM BOOKING, click http://129.94.165.9/userconfirmationscript/userconfirmation-1517102227585.php

TO CANCEL BOOKING, click http://129.94.165.9/userconfirmationscript/usercancellation-1517102227585.php

Kind regards.

Mark Wainwright Analytical Centre: Bioanalytical Mass Spectrometry Facility

THIS IS SYSTEM GENERATED USER CONFIRMATION NOTICE. PLEASE DO NOT REPLY.

The system scans confirmation responses once a day at 12am. It is at this time that outstanding bookings are cancelled. For cancelled bookings, system sends out a cancellation email to the appropriate users. Also, the confirmation URL page is deactivated and cannot be used anymore.

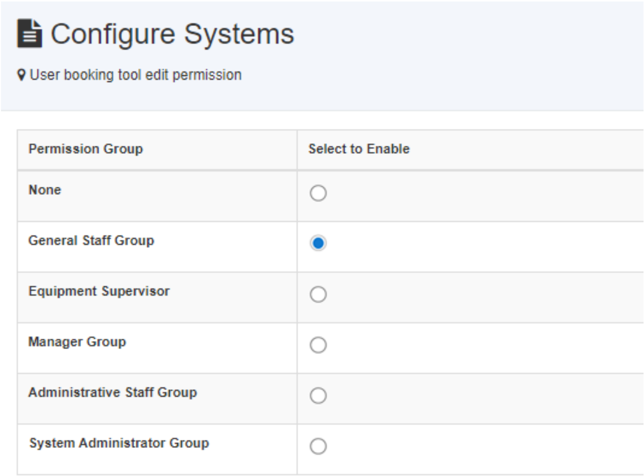
6.6 Change Bookings

This section is only available to staff. A nominated staff group can change anyone's future bookings through ***User/Approve Booking***. By default, this is disabled.

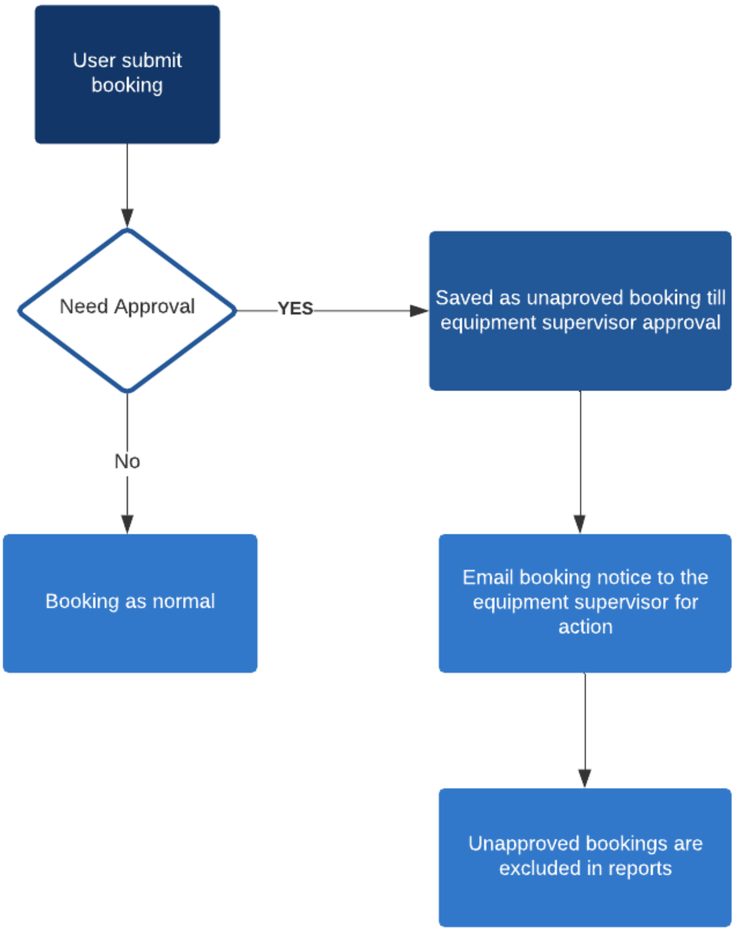
Keep in mind that typically a future booking can only be changed by the person who made the booking or cancelled through service booking. If you enable this setting, you may risk changing the bookings of others without their permission, or by mistake. It is strongly recommended to keep this feature disabled, unless you have a specific need for it, and you are aware of the consequences.

For system administrators only. Go to ***System Settings*** -> ***Configure System -> Right Function Menu***, click on ***User Booking Calendar Editable Permission***.

The checked staff groups will have the capability to edit other people's bookings.



6.7 Pre-Approval Bookings

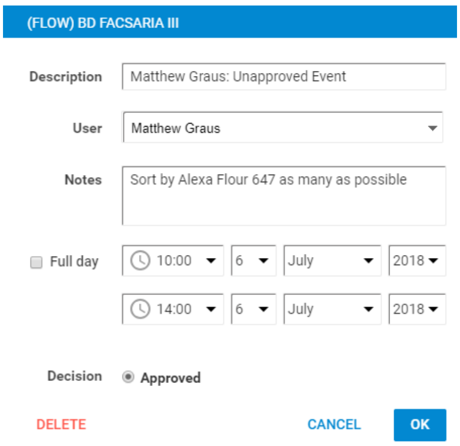


If a resource booking is subject to approval by trainers, then these bookings will be initially flagged as “unapproved” booking events. When an unapproved booking is made, an email notice is sent out to all trainers of that resource. Any qualified trainer can approve or decline these bookings. Unapproved bookings are excluded from booking reports until they are approved.

- Approve Bookings:

Trainers can approve an unapproved booking through ***User/Approve Booking***.

Clicking on the unapproved event opens a form:



You can approve the booking by checking the “Approved” radio button and pressing OK. Users will be notified automatically.

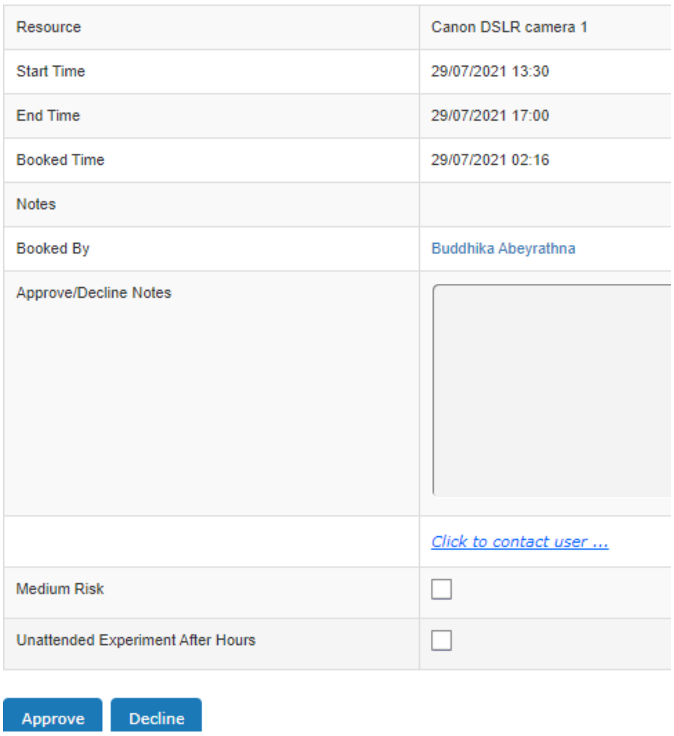
- Decline Bookings:

You decline an unapproved booking by deleting it.

- Direct Access to Unapproved Bookings on Dashboard:

If you are a listed trainer, you can expressly approve or decline unapproved bookings without needing to go through the calendar, by visiting ***My Dashboard -> Approve Bookings***.

The page on the dashboard will show an indicator for outstanding bookings needing action.



Resource	Canon DSLR camera 1
Start Time	29/07/2021 13:30
End Time	29/07/2021 17:00
Booked Time	29/07/2021 02:16
Notes	
Booked By	Buddhika Abeyrathna
Approve/Decline Notes	
	Click to contact user ...
Medium Risk	☐
Unattended Experiment After Hours	☐

Approve Decline

If you need to contact the user for any reason, please click on ***Click to contact user***.

- Direct Links to Approve/Decline Unapproved Bookings:

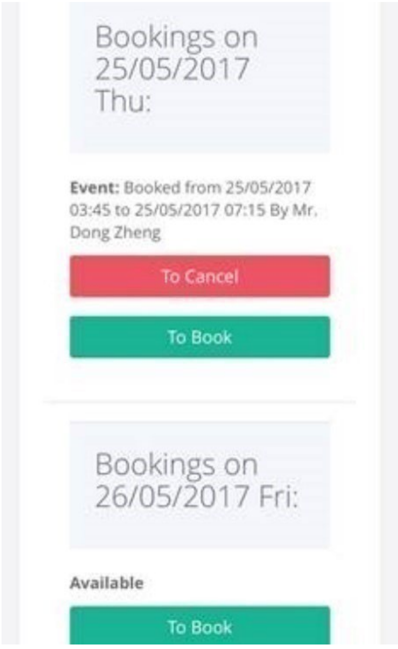
In addition to the quick access through ***My Dashboard***, the email notice to trainers contains a direct link to process any unapproved bookings. Simply click on the link in the email notice to proceed.

- Booking Reports and Invoices:

Unapproved bookings do not count as valid bookings in reports and invoices.

- Mobile app and mobile browser:

- If you are the trainer, you can approve or decline an unapproved booking event.
- You can cancel any unapproved booking event made by yourself.



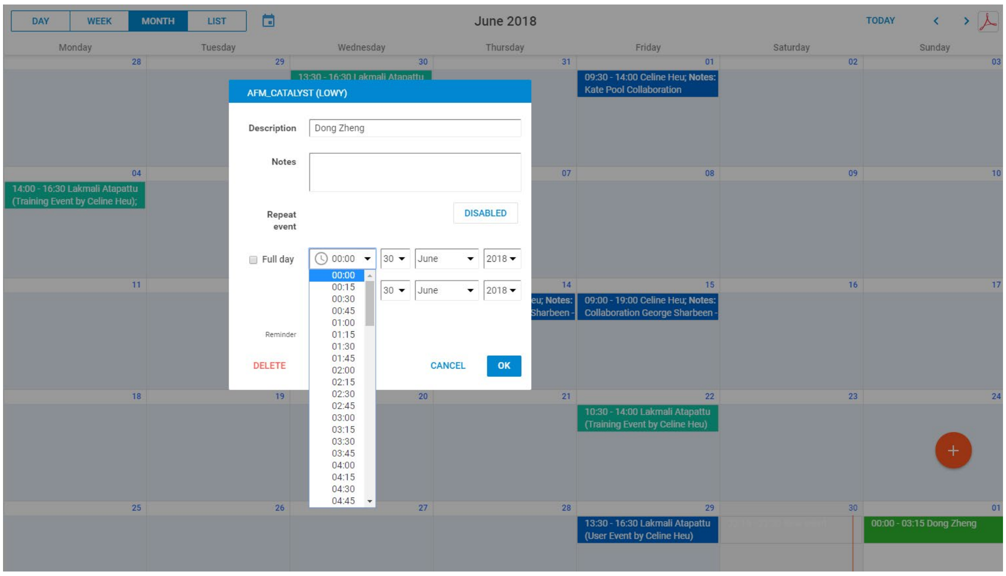
- If you are a user, the system indicates that the event you are going to book is subject to approval.

6.8 About the Minimum Booking Unit (MBU)

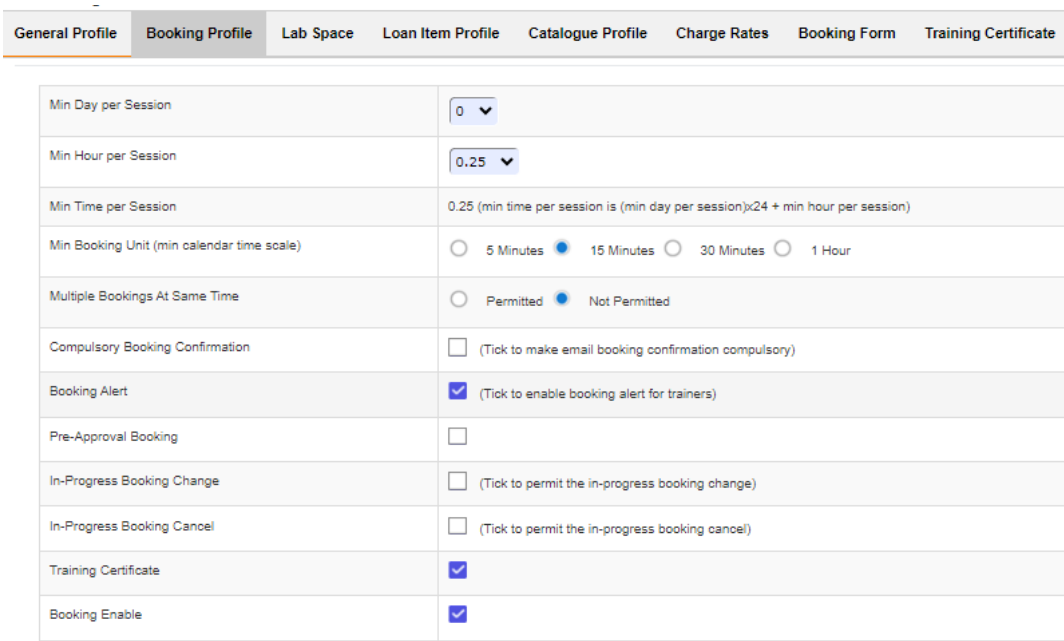
The minimum booking unit defines the blocks of time that make up a booking duration. The options are:

- 5 minutes
- 15 minutes
- 30 minutes
- 60 minutes/1 hour

For example, a 15 minute booking unit means that a booking must be made of multiples of 15 minutes, starting from midnight. In this situation, valid start times would be 00:00am, 00:15am, 00:30am, etc.



Go to ***Utilities*** -> ***Resource Manager*** to set the Min Booking Unit.



6.9 About Min Time Per Session (MTPS)

Min Time Per Session is designed to prevent under-booking issues. The MTPS includes two parts:

- Min day per session
- Min hour per session

MTPS is calculated with the following formula:

Min hours per session is equal to (min day per session)*24 + min hour per session

Admins and managers can go to ***Utilities -> Resource Manager*** to edit the MTPS on a resource-by-resource basis.

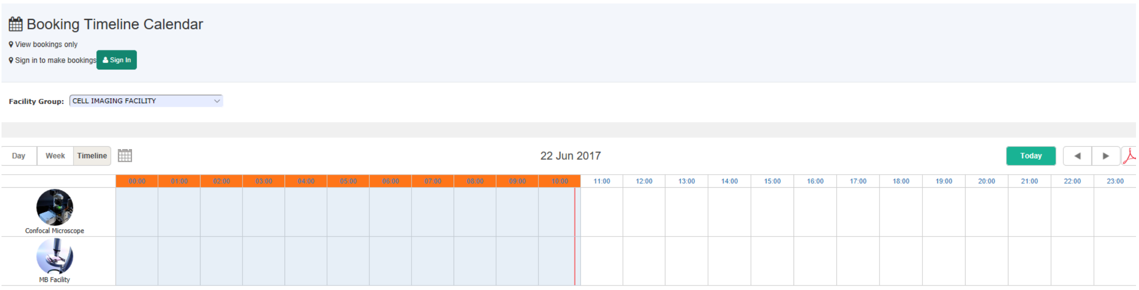
ACLS checks each booking session duration to see if it is less than the MTPS. If so, the booking is declined.

6.10 About Public Calendar

ACLS allows admins to set up a Public Access Calendar that can be viewed without logging in. The booking details can be hidden depending on your settings. Setting up the Public Access Calendar provides a quick way of accessing booking information.

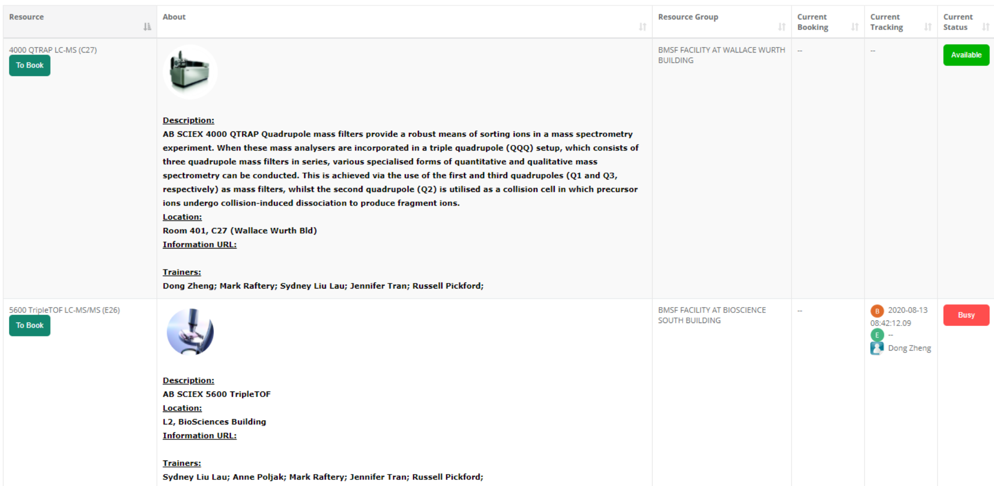
The public calendar can be accessed by going to the initial ACLS home page (the login page) and clicking “To View Bookings”.

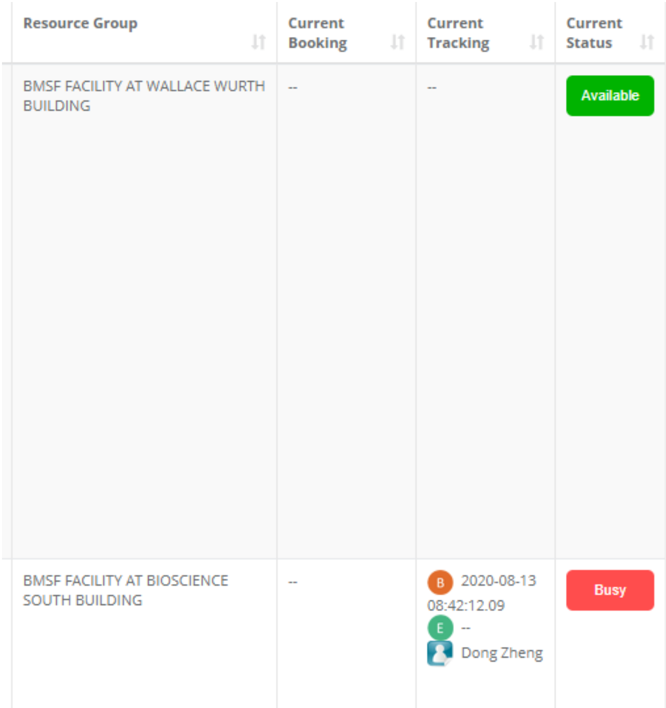
The public calendar shows bookings for the next 7 days.



6.11 About Resource Status

Click on ***Dashboard -> Resource Status*** to view the status of a resource. The status covers the current booking status and ACLS Tracker availability. For example, it will show if the resource is currently busy or available, and it will show any tracker login sessions.

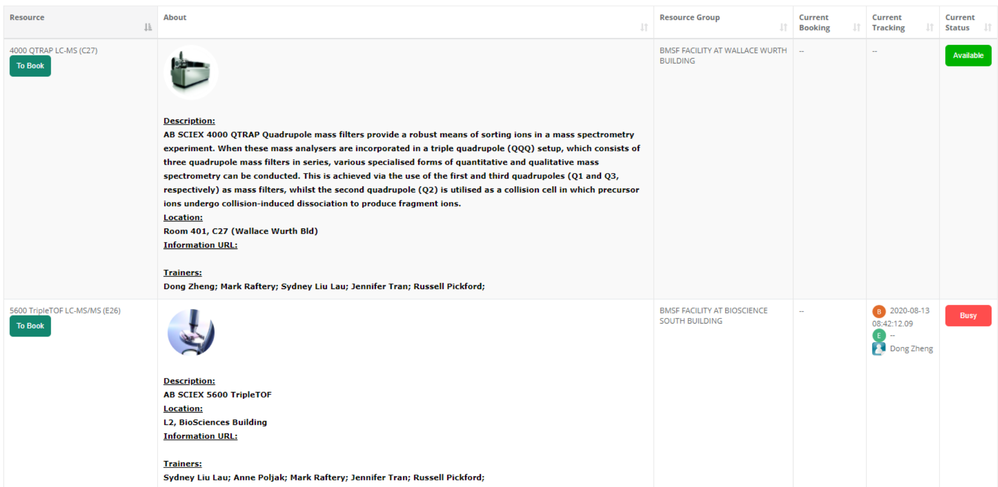




Resource Group	Current Booking	Current Tracking	Current Status
BMSF FACILITY AT WALLACE WURTH BUILDING	--	--	Available
BMSF FACILITY AT BIOSCIENCE SOUTH BUILDING	--	B 2020-08-13 08:42:12.09 E -- Dong Zheng	Busy

6.12 My Bookable Resources

An alternate way of viewing resource booking status is through ***Resources -> My Bookable Resources.*** This page lists resources that you are allowed to book with your training certificates.

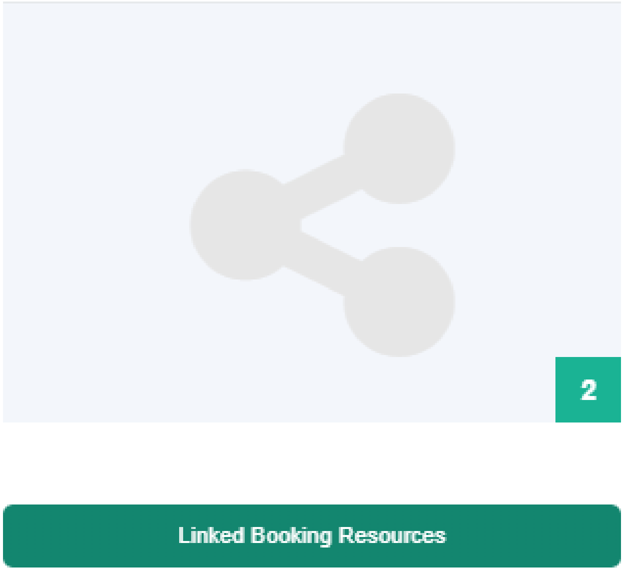


Resource	About	Resource Group	Current Booking	Current Tracking	Current Status
4000 QTRAP LC-MS (C27) To Book	**Description:** AB SCIEX 4000 QTRAP Quadrupole mass filters provide a robust means of sorting ions in a mass spectrometry experiment. When these mass analysers are incorporated in a triple quadrupole (QQQ) setup, which consists of three quadrupole mass filters in series, various specialised forms of quantitative and qualitative mass spectrometry can be conducted. This is achieved via the use of the first and third quadrupoles (Q1 and Q3, respectively) as mass filters, whilst the second quadrupole (Q2) is utilised as a collision cell in which precursor ions undergo collision-induced dissociation to produce fragment ions. **Location:** Room 401, C27 (Wallace Wurth Bld) **Information URL:** **Trainers:** Dong Zheng; Mark Raftery; Sydney Liu Lau; Jennifer Tran; Russell Pickford;	BMSF FACILITY AT WALLACE WURTH BUILDING	--	--	Available
5600 TripleTOF LC-MS/MS (E26) To Book	**Description:** AB SCIEX 5600 TripleTOF **Location:** L2, BioSciences Building **Information URL:** **Trainers:** Sydney Liu Lau; Anne Poljak; Mark Raftery; Jennifer Tran; Russell Pickford;	BMSF FACILITY AT BIOSCIENCE SOUTH BUILDING	--	B 2020-08-13 08:42:12.09 E -- Dong Zheng	Busy

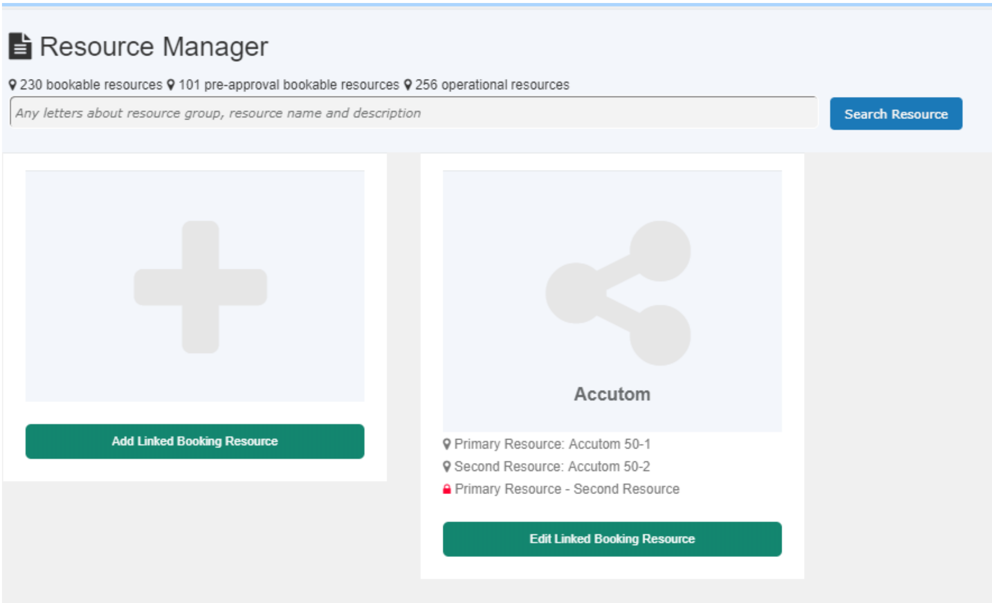
6.13 Linked Booking Resources

The linked booking resource calendar connects multiple resources so that creating a booking on one will also create a booking on the other. When doing this, the system checks availability on both resources before making the booking.

First, you need to set up a linked booking resource via Resource Manager. Click through to the Linked Booking Resource page.

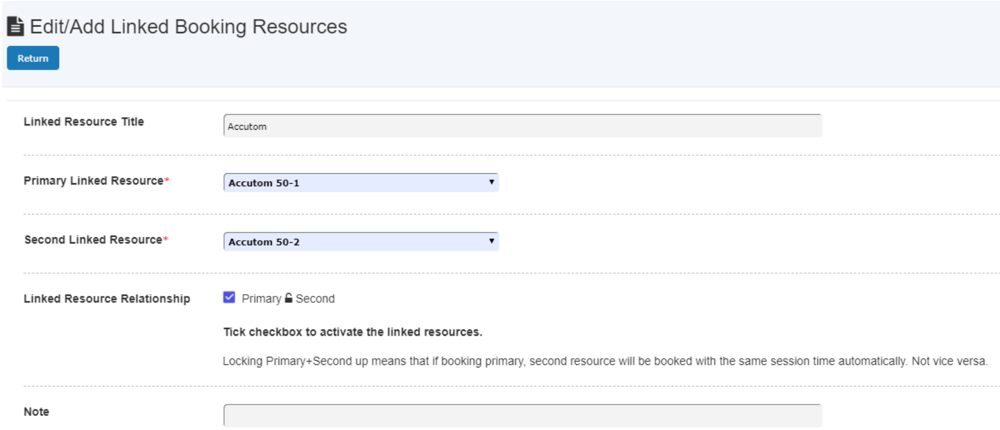


One resource is designated as a primary resource, and one resource is designated as a secondary resource. Making a booking on the primary resource will make a booking on the secondary resource, but not the other way round. It is a one-way relationship.

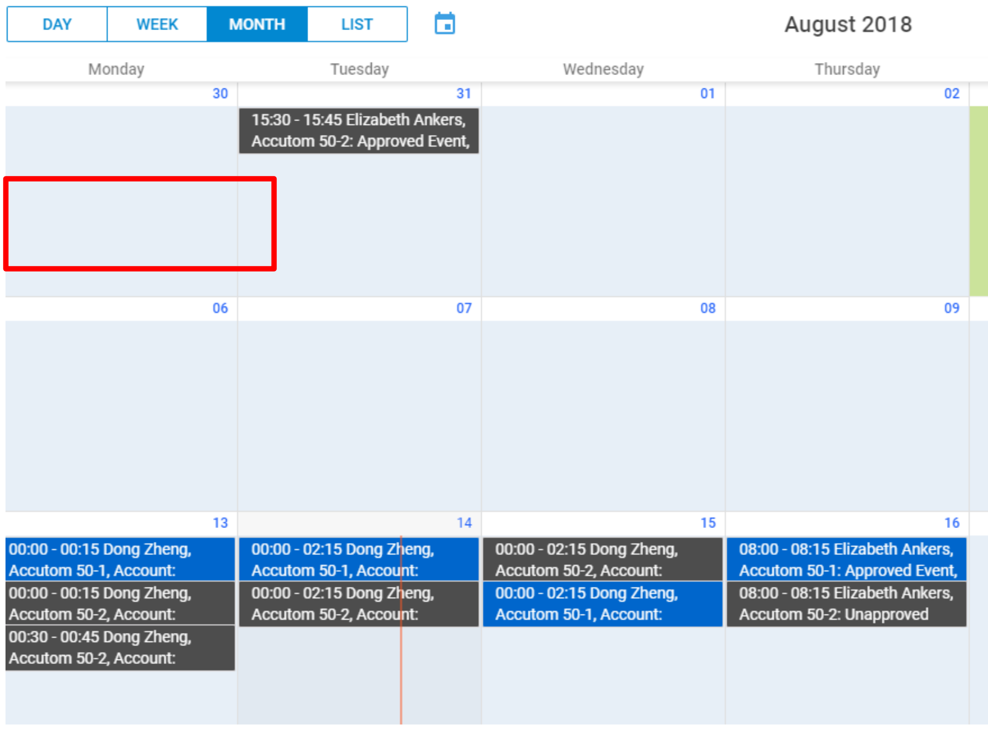


The lock checkbox indicates the link status. If ticked, the link is set to active. Otherwise, the resource link is not active.

As an example, if resource A and resource B are linked, then booking resource A will automatically book resource B for the same timeslot. But booking resource B will not book resource A.



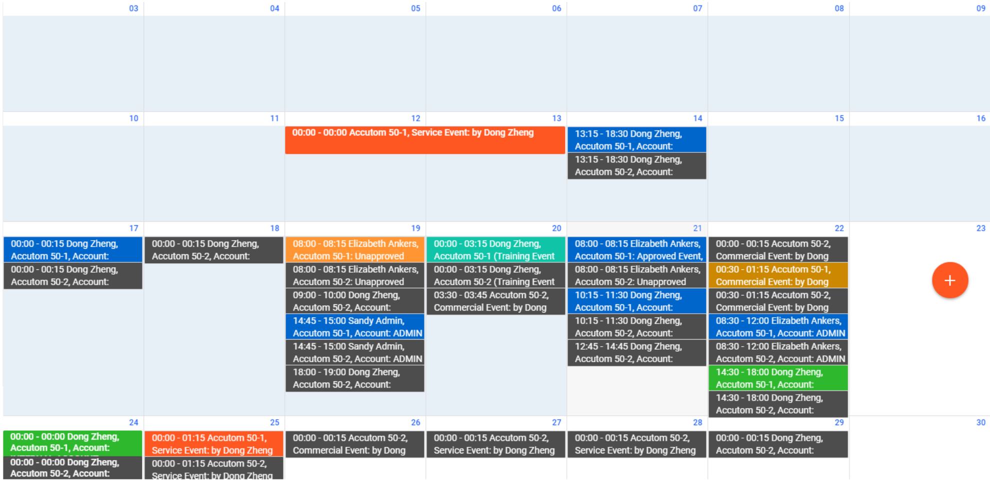
On the booking calendar, linked bookings are represented with a grey coloured booking block.



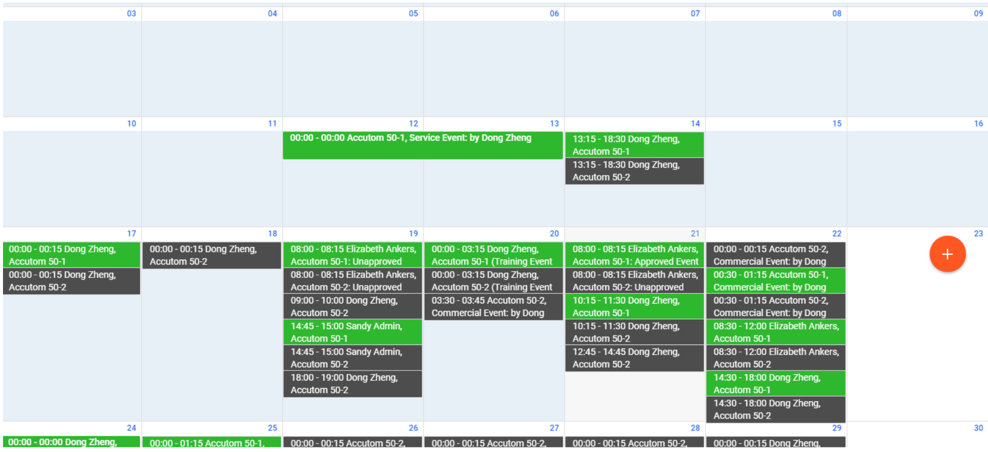
6.13.1 Making a booking for a linked resource

The following pages support linked resource booking. A linked resource booking is indicated by a grey colored tile.

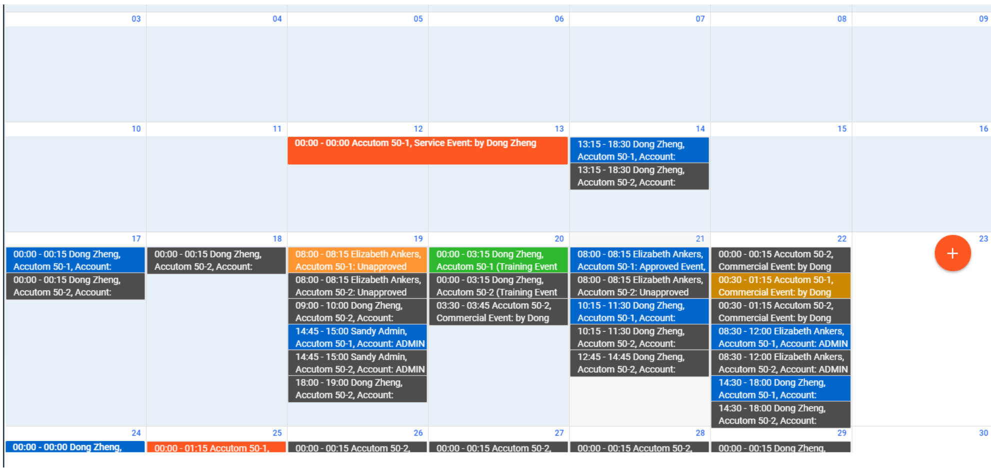
- Operation calendar



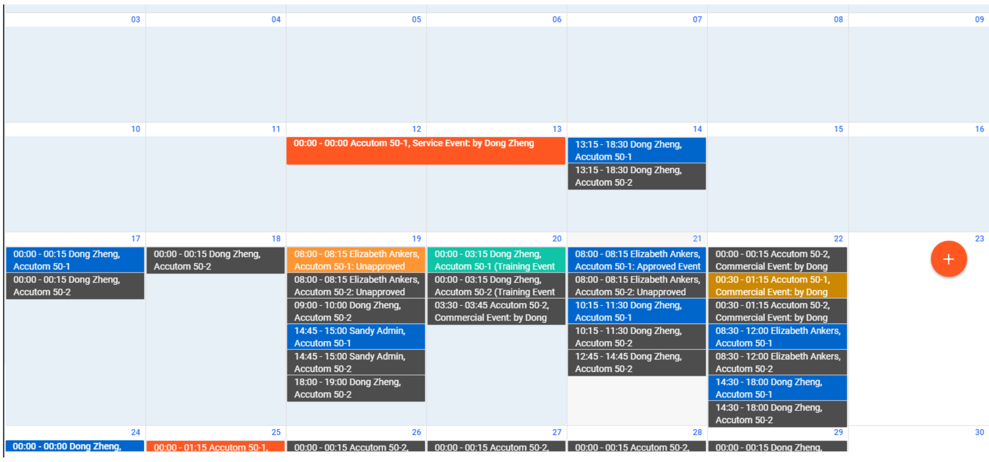
- User booking calendar



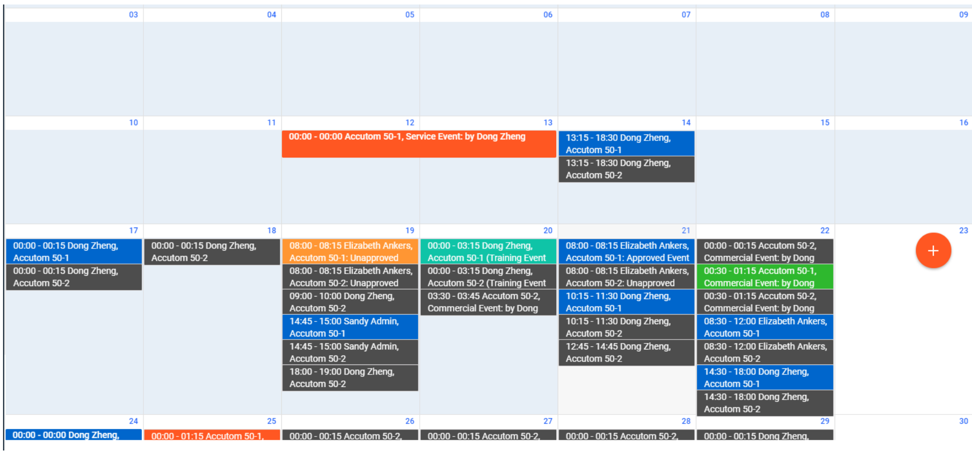
- Training calendar



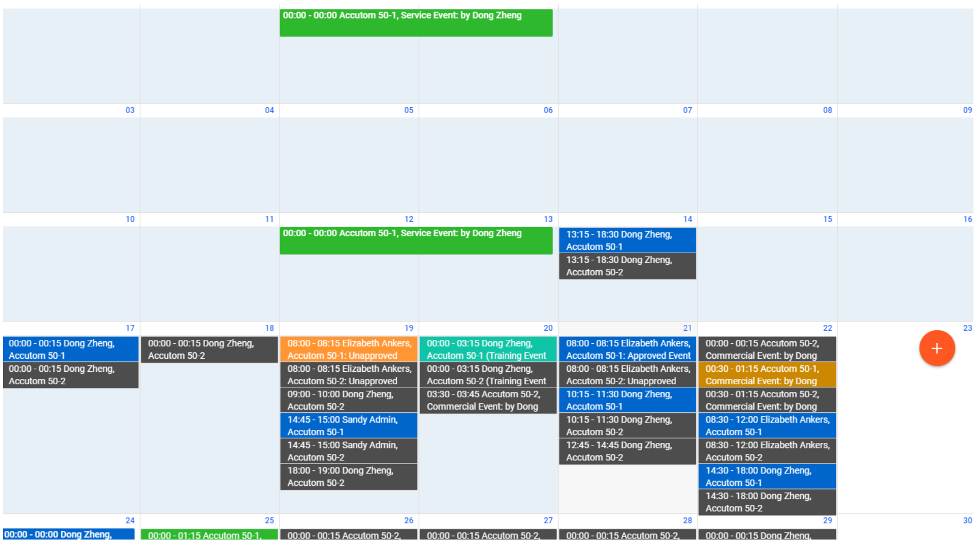
- Group calendar



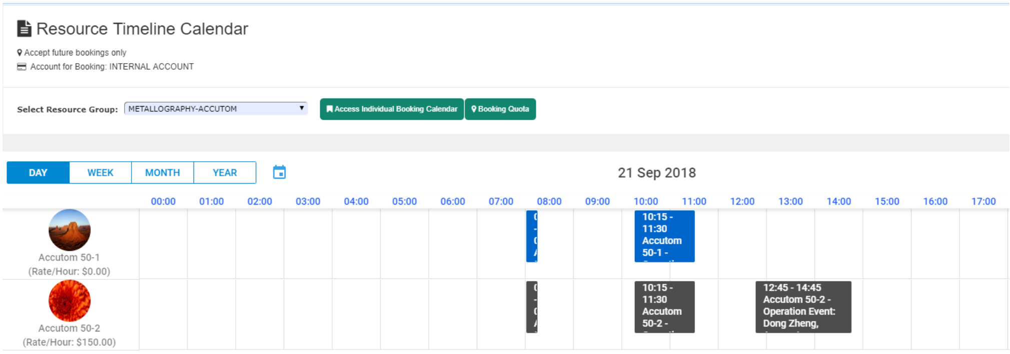
- Commercial calendar



- Service calendar



- Timeline calendar



6.14 Sync ACLS calendar to Outlook calendar

Syncing the ACLS calendar to outlook will display your ACLS bookings in your Outlook calendar as well.

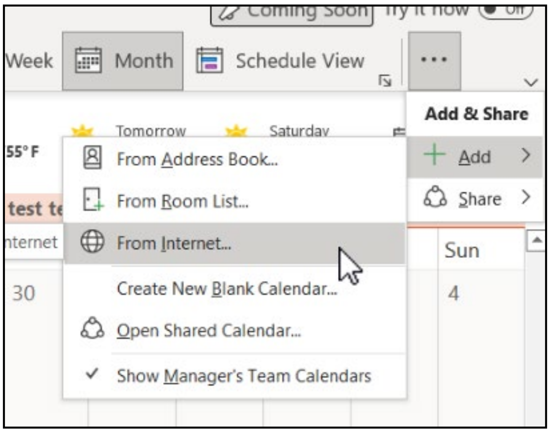
Navigate to ***Resources > Outlook Calendar Sync***. Copy the provided URL and follow the instructions according to your preferred calendar application.

Most modern calendar applications allow you to import a calendar via URL. General instructions are as follows:

1. Sign into your preferred calendar application
2. Click Add calendar > Subscribe from web
3. Copy and paste the given ACLS calendar url into the outlook form

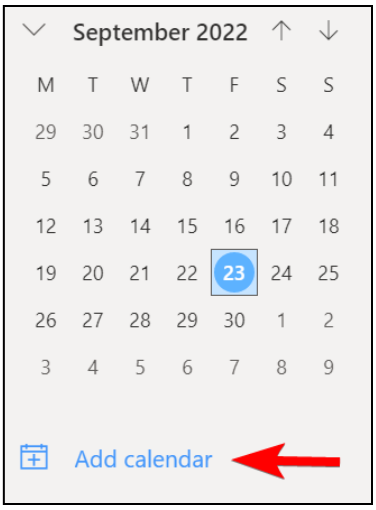
6.14.1 Adding the calendar to Outlook (application)

In the calendar tab, navigate to Home > … > Add > From Internet…
Paste the calendar URL in the dialogue box. Outlook will update the calendar once every 3 hours.



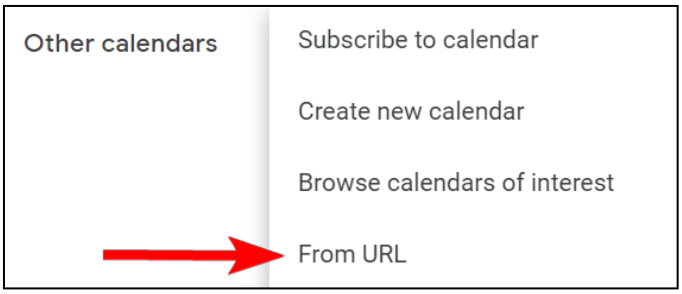
6.14.2 *Adding the calendar to Outlook (web)*

In the calendar tab, navigate to Add Calendar > Subscribe from web.
Paste the calendar URL in the input form. Outlook will update the calendar once every 3 hours (approximately).



6.14.3 *Adding the calendar to Google Calendar*

Navigate to Other Calendars > + Button > From URL.
Paste the calendar URL in the input form. Google Calendar will update the calendar once every 12 hours (approximately).

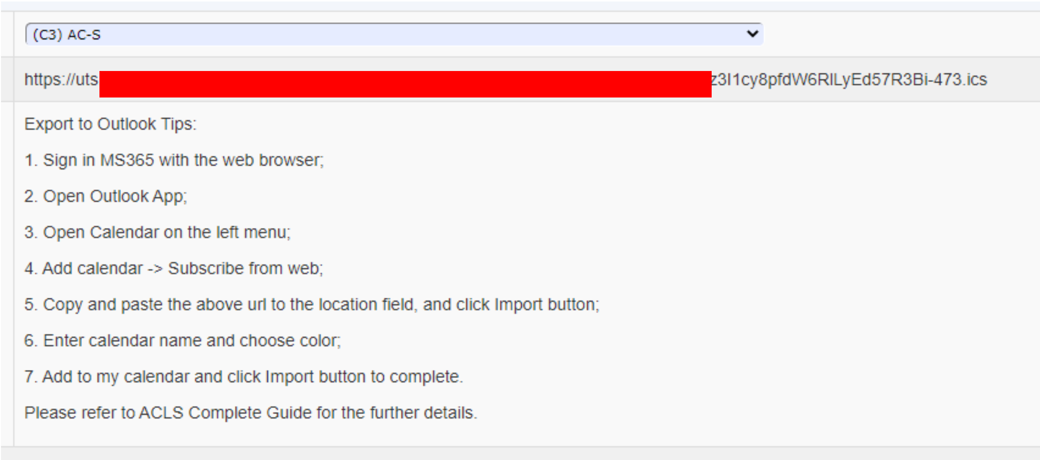


6.14.4 Additional calendars for staff

The previous section provided access to the user's personal bookings. Staff members can also import the following calendars.

6.14.4.1 Resource Calendar

Staff can export a calendar that lists all bookings made on a particular resource. Navigate to: ***Resources > Outlook Calendar Sync*** and follow the same instructions to import the calendar.



6.14.4.2 Resource Group Calendar

Staff can export a calendar that lists all bookings made on all resources within a particular resource group. Navigate to: ***Resources > Outlook Calendar Sync*** and follow the same instructions to import the calendar.

6.15 Set up accounts

The account manager has the following sections:

- Add account
- Active accounts
- Archived accounts
- Active account analytics
- Single account analytics

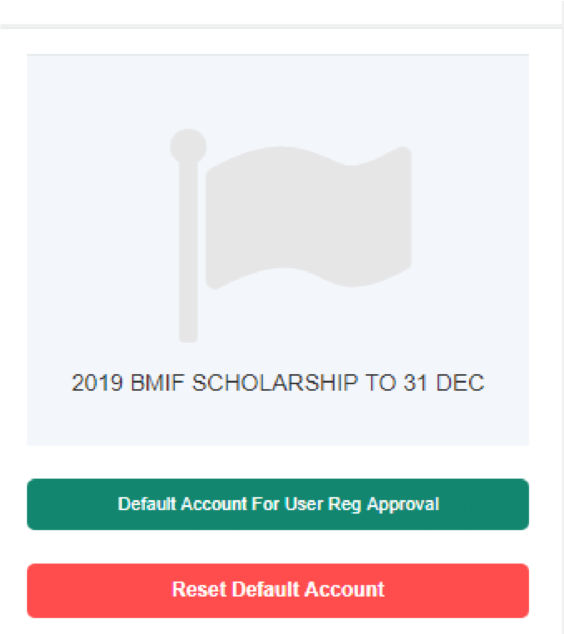
An account profile requires the following data.

Parameter	Description
Account	Account number or name provided by the user upon registration
Account Type	Internal or external
Used for consumable order	Lab admins can set up an account for consumable orders. By default, all accounts are for consumable orders.

Charge rate per hour	Charge rate, depending on the business model. If you are using the resource charge rate scheme, you don't need to set this field up.
Note	Any extra remarks
Expiry Date	Expiry date of account
Recorded Created	Creation date of account
Last Update	Timestamp of most recent modification, with the name of the user who made the change.

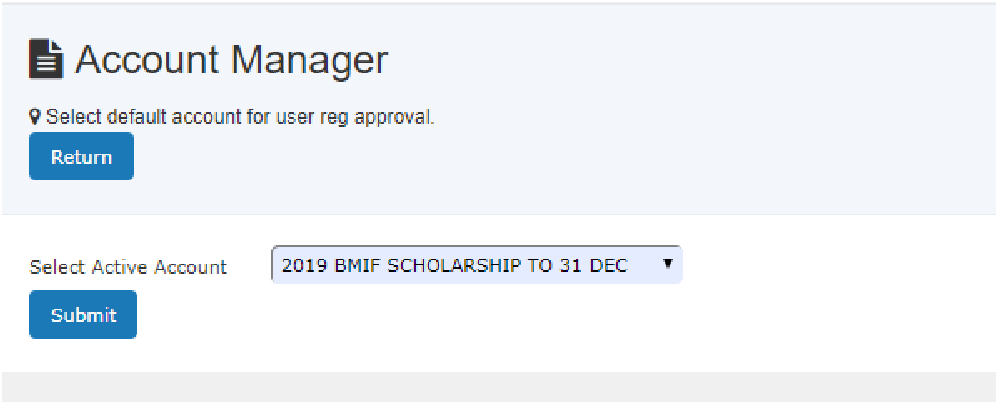
6.16 Default User Registration Account

For labs that do not require to capture usage for billing purposes, you can set up a default account for each registration approval. This means that ACLS automatically adds this default account to each new user profile, so that the user can immediately book resources. By doing so, you don't need to process any account information for each new user.



If an account is designated as the default account, it will display "Default Account For User Reg Approval" on the accounts page. If needed, click reset to clear the default account setting.

To set up a default account, click on Default Account for User Reg Approval.



6.17 Register a Project

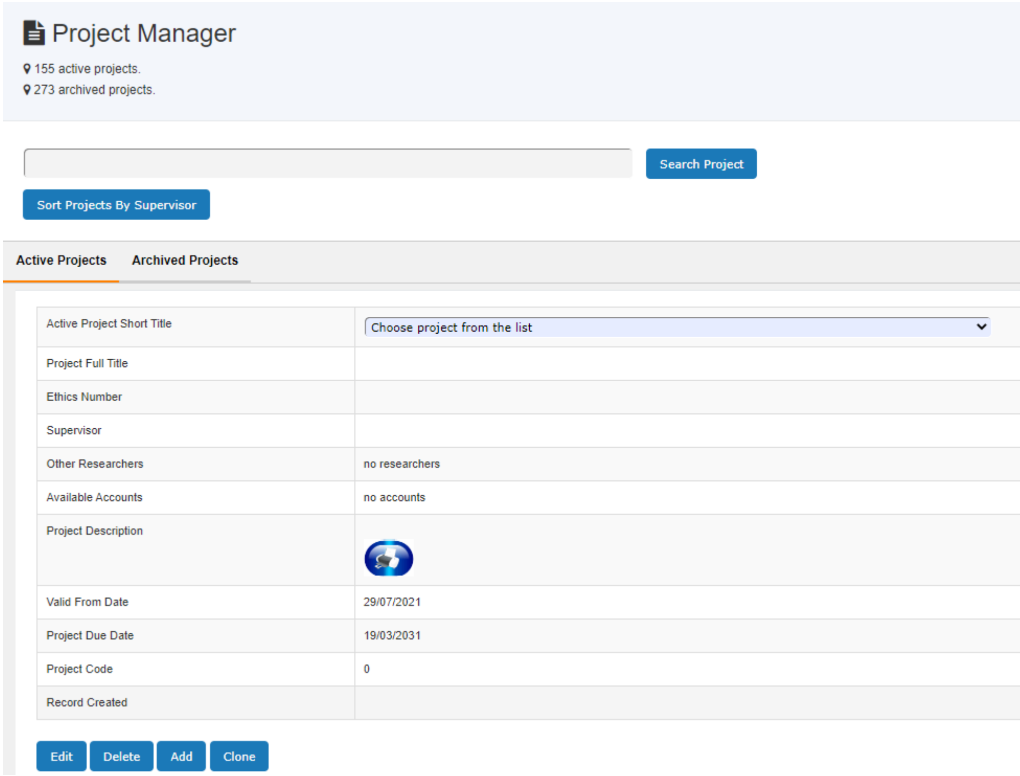
If ACLS is configured to be project-based (UNSW and ANFF UQ), at least one project needs to be registered before users can access the system.

To register a project, you must enter the following information:

- Project short title
- Project full title
- Project supervisor (contact point of project)
- Project accounts
- Cost contributions from each account in the project
- Project researchers
- Charge rate for each researcher
- Project validation

For example, say that researcher #1 is charged $50 per hour for using any instrument. If the project has two accounts #A and #B where #A contributes 80% of the cost and #B contributes 20%, then$40 will be billed to account #A and $10 to account #B.

Following the registration of a project, ACLS will generate a printable project information list. This information can be used for future reference.

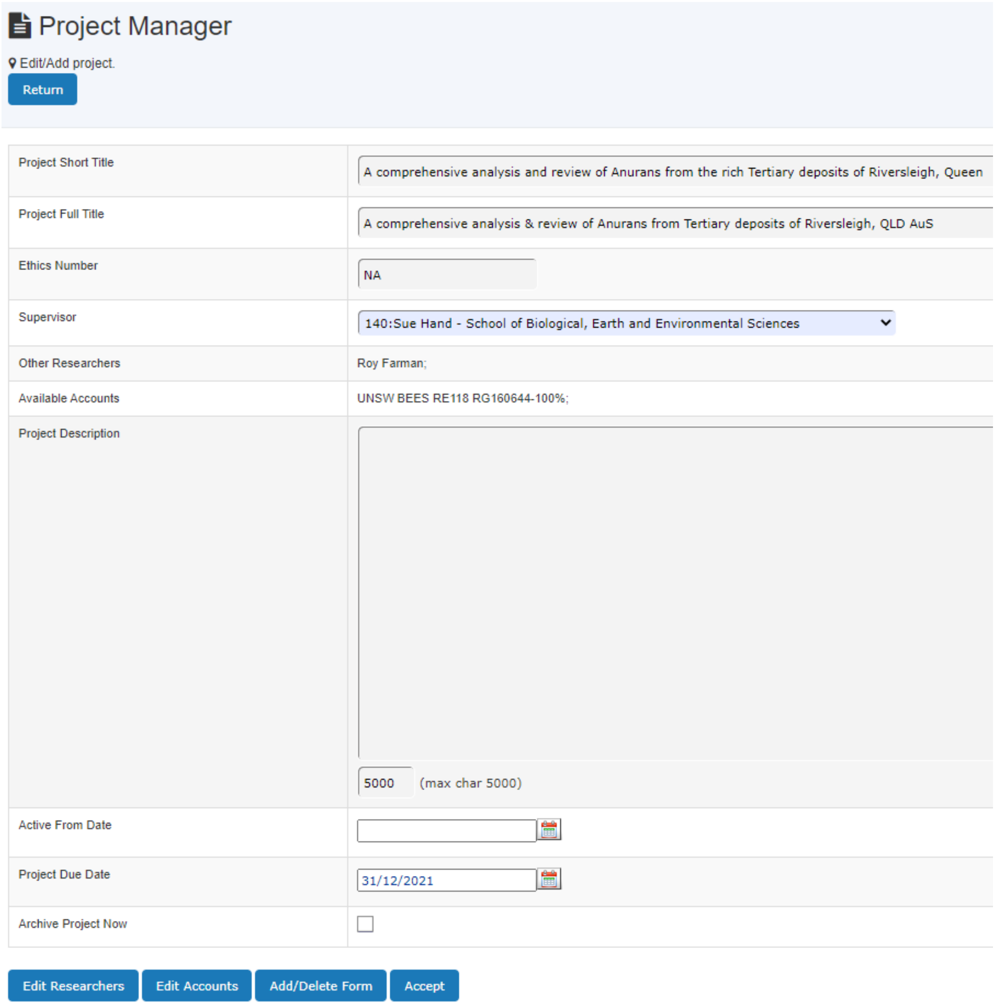


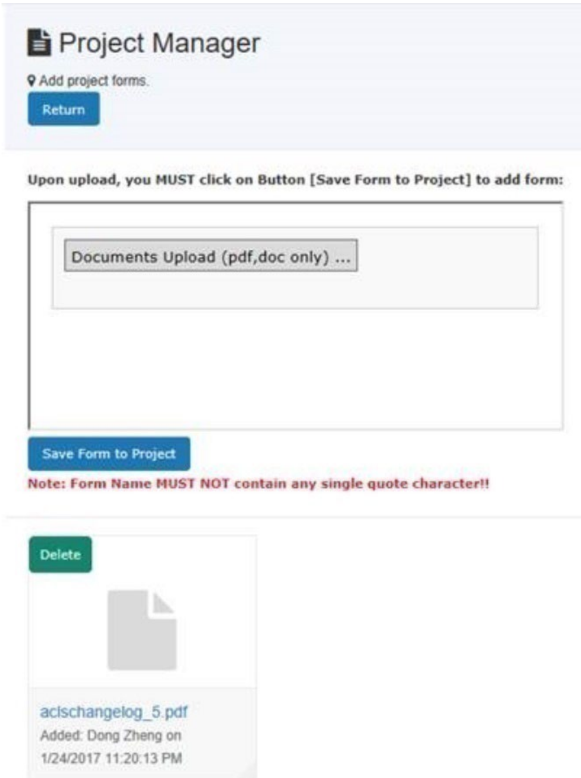
There is also a search function to quickly locate projects. For example, type in 'mole' to search any projects related to molecules. To edit the project, click on the **Edit** button.

Project Form:

You can upload any related project forms. For example: ethics forms, animal forms, project funding forms, project OHS forms, etc.

Click on **Add/Delete Form** to start. The page will request a file upload of pdf or word document format. Be sure to press "Save Form to Project".


Project Manager
Edit/Add project.
Return
Project Short Title
A comprehensive analysis and review of Anurans from the rich Tertiary deposits of Riversleigh, Queen
Project Full Title
A comprehensive analysis & review of Anurans from Tertiary deposits of Riversleigh, QLD AuS
Ethics Number
NA
Supervisor
140:Sue Hand - School of Biological, Earth and Environmental Sciences
Other Researchers
Roy Farman;
Available Accounts
UNSW BEES RE118 RG160644-100%;
Project Description
5000 (max char 5000)
Active From Date
Project Due Date
31/12/2021
Archive Project Now
Edit Researchers
Edit Accounts
Add/Delete Form
Accept


Project Manager
Add project forms.
Return
Upon upload, you MUST click on Button [Save Form to Project] to add form:
Documents Upload (pdf,doc only) ...
Save Form to Project
Note: Form Name MUST NOT contain any single quote character!!
Delete
aclschangelog_5.pdf
Added: Dong Zheng on
1/24/2017 11:20:13 PM

6.18 Search Users

There are a few ways to search for a user:

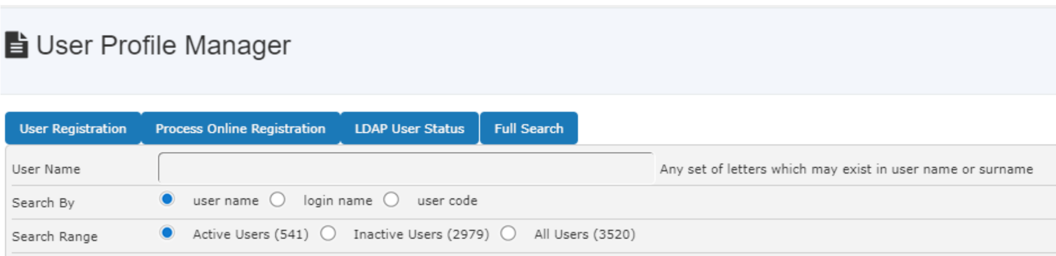
- Through the User Profile Manager
- Through Find User Training Records
- Through Find User By Supervisor
- Through the Newly Reg User Summary

The level of access control is detailed in the table below:

Level of Access	
User Profile Manager	▪ The User and Supervisor group are only allowed to edit their own profile ▪ The Staff group and Lab Manager group can search and view user profiles, and issue training certificates ▪ The Admin group can search, edit, add user profiles, and edit user accounts
Find User Training Records	▪ Explore user training records ▪ The Staff group and any higher groups can access this function
Find By Supervisor	▪ The Supervisor group can view the profile of a user under their supervisionThe Staff group and any higher groups can access this function
Newly Reg User Summary	▪ The Staff group and any higher groups can access this function

6.18.1 User Profile Manager

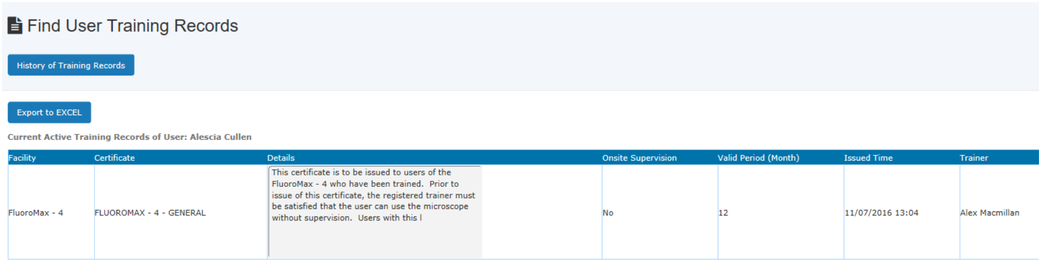
ACLS provides a quick search and a full search function. The default is a quick search. However, as staff, you can run a full search with many options such as school/organization, account, project, group, training certificates, and phone number.



The results can be displayed as Short Form results or Full Form results.

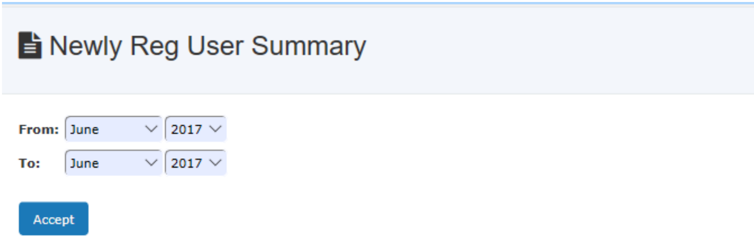
6.18.2 Find User Training Records

Staff and admin can search and find any user training record.



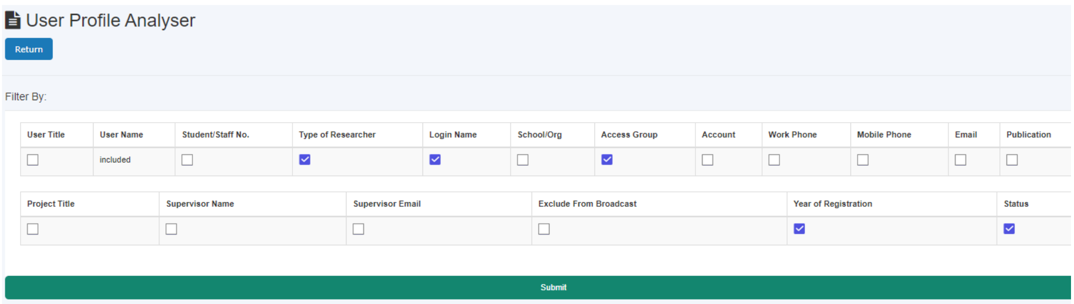
6.18.3 Newly Reg User Summary

This function displays the number of new users registered during a specified period of time.



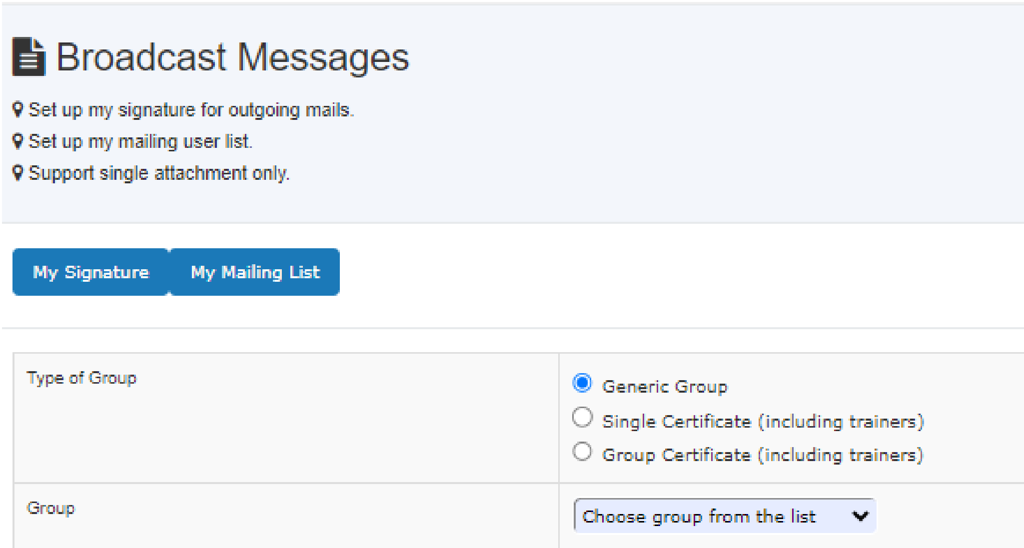
6.19 Export User Data

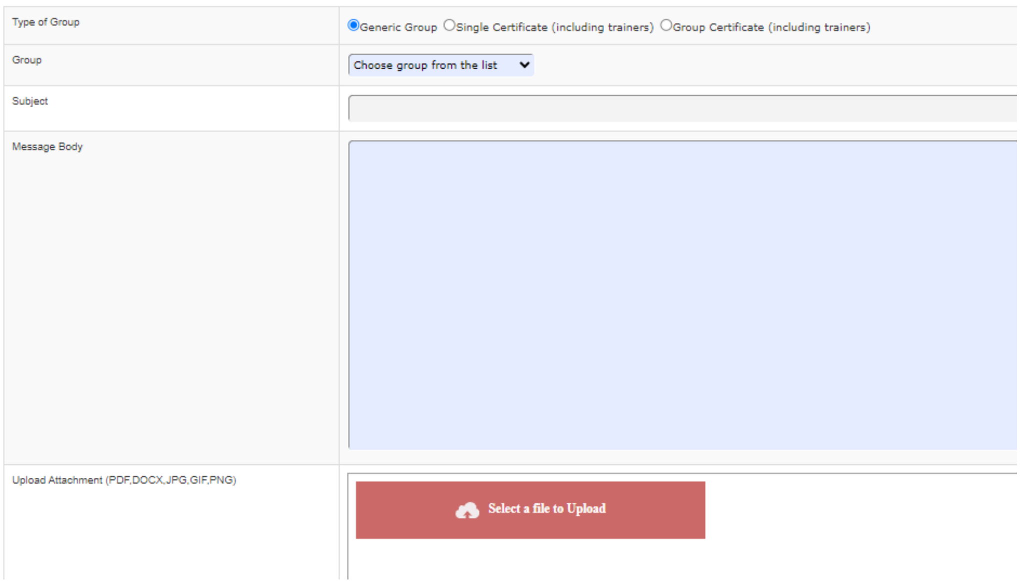
You can export user data to an excel file. Navigate to **User Profile Analyser -> Grid Charts**. Select the fields that you would like to export, and press submit.



6.20 Broadcast Email Notices

To broadcast an email notice to a group of users, click on ***Broadcast Messages***. You can send emails to different predefined user groups, such as all the users trained under a particular certificate. Select the user group or training certificate group and fill out the email contents. You can also attach a document, if you wish.





You can set up a signature, which operates similarly to other email client programs like Microsoft Outlook. When set up, it is automatically attached to the end of each message.

- My Mailing List

You can set up your own custom mailing list. Choose **My Mailing List** in Type of Group to manually set up your list. You can broadcast to this list or just get the list of emails.

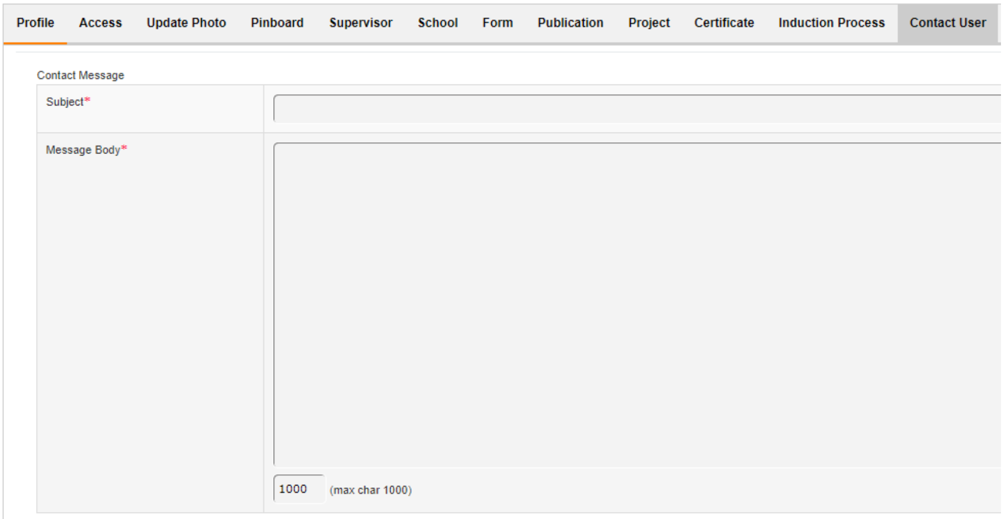
- Generate Email List

You can also generate a full list of email addresses for a selected group through **Generate Email List**, so that you can manually send an email through any email client program. This may be useful if you would like to add more formatting or attachments.

- Check the box **Generate Email List**
- Click on **Send Message** to compile the list

6.21 Contact User

Staff can contact each user at the user profile page. This is a handy tool to communicate with an individual user. Click on the Contact User tab.

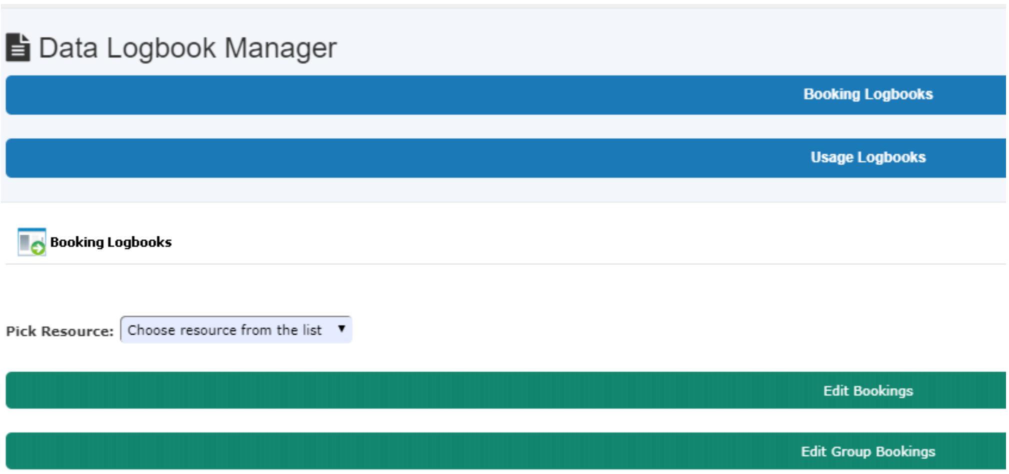


6.22 Edit Booking Data and Tracker Log Data

6.22.1 Booking Data

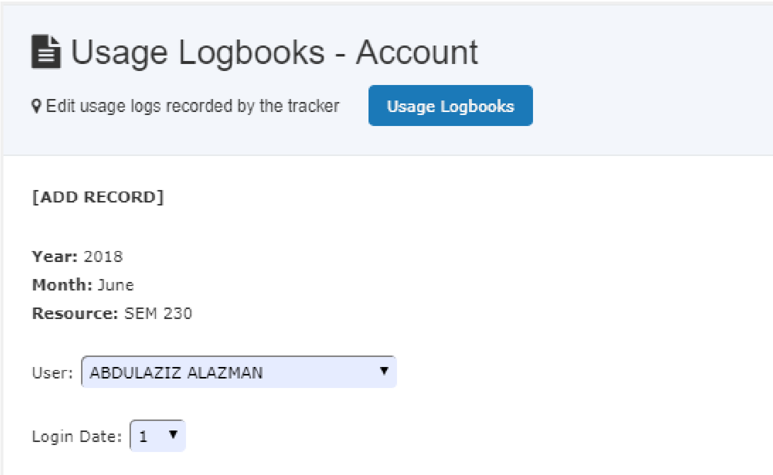
Staff members can edit, delete, and add bookings for the previous two months. For example, if a user falls sick on the day of a booking, a staff member can correct this by deleting their booking.

This can be done through the Data Logbook Manager.



6.22.2 Tracker Log Data

Staff can update incorrect ACLS Tracker login and logout times or add new logs. There is a built-in feature to auto-detect an incorrect time log, such as a missing logout time. Incorrect log data is highlighted in red to indicate that a correction is needed.



The system displays the entire tracker log data for a selected date.

The following are some possible reasons for an tracker session missing a logout time.

- The user logs off the computer instead of clicking logout on the tracker.
- The user reboots the computer without clicking logout on the tracker.
  The system fails to record a logout time due to a network failure.The system fails to record a logout time due to a server failure.

In these cases, admin or staff members will need to correct these usage logs in order to ensure invoices and usage reports are accurate. Ideally, a correction should be carried out once a month e.g in the first week of every month, correcting the previous month's entry.

- **Fix Error Logs**

  If there are no errors, the table will be blank. Otherwise, there will be a list of erroneous logs.

  Pressing "Click to Fix" will add a new logout time to the record. This logout time holds a placeholder value of 0.1 hours. You will need to edit this value to correctly record the user's usage time.

  Recommended steps to estimate the correct usage time:

  - Contact the user who was involved in the tracker session
  - Check against the booking hours made by the user

  You may also choose to apply an estimate of usage time based on the lab policy and your experience.

It is good practice to save or print out the error logs in case you wish to compare the results after fixing them.

The system highlights any usage hours at 0.1h, since this is the placeholder value that you should manually adjust.

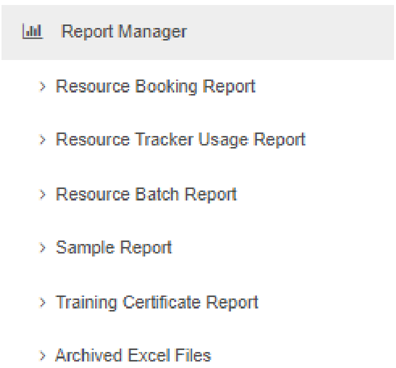
You may occasionally see a few 0 hour logs, which are not necessarily erroneous.. Sometimes users may login and logout quickly on instrument computers for simple tasks less than 0.1h (6 minutes) in length.

- **Important Notes**

The error fixing tool is not guaranteed to fix all errors. If the tool is unable to fix a particular error, you may delete the session log entirely and manually add a new one. However, only the system administrator can access this function, because deleting logs is a non-recoverable action.

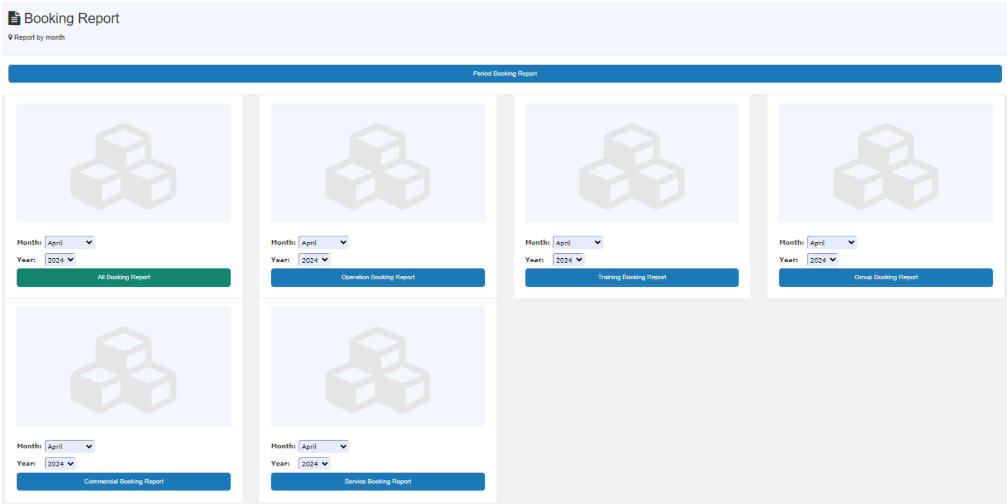
6.23 Generate Reports

Click on **Report Manager** to see the reporting options. Reporting options are dependent on system configuration, such as booking data or usage (log) data.

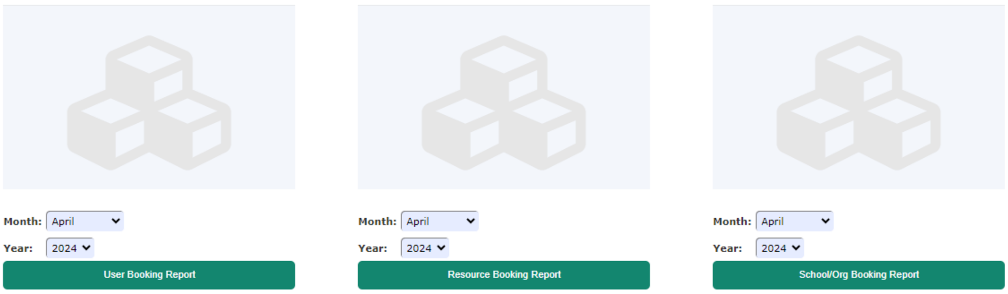


6.23.1 Resource booking report

You can select from multiple reporting functions (monthly or period) to consolidate booking data. You can export the data as an Excel file for further data analysis.



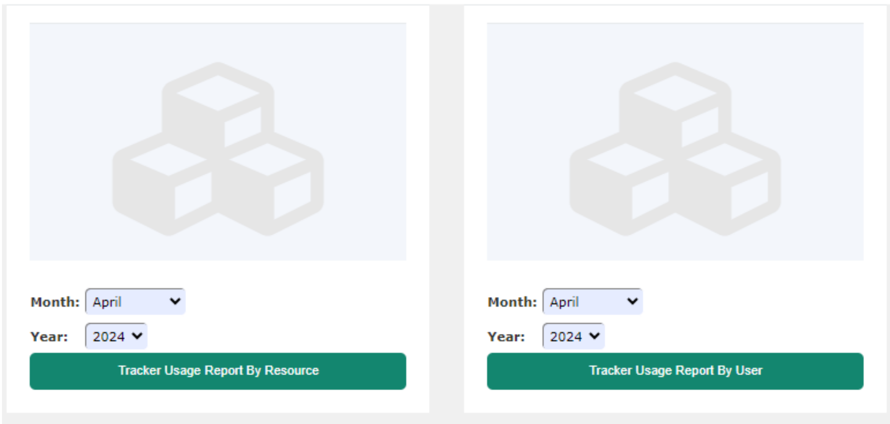
Special featured report functions are also available, such as the User Booking report, the Resource Booking report, and the School/Org Booking report.



6.23.2 Resource tracker usage report

For institutions that deploy the ACLS Tracker desktop app, the user's usage data is collected in addition to the booking data for example, a user may book for 2 hours, but actually use the resource for 3 hours.

The tracker report aims to report the actual operation time of each user's session. The report tool can provide a report sorted by resource usage, or a report sorted by user usage.

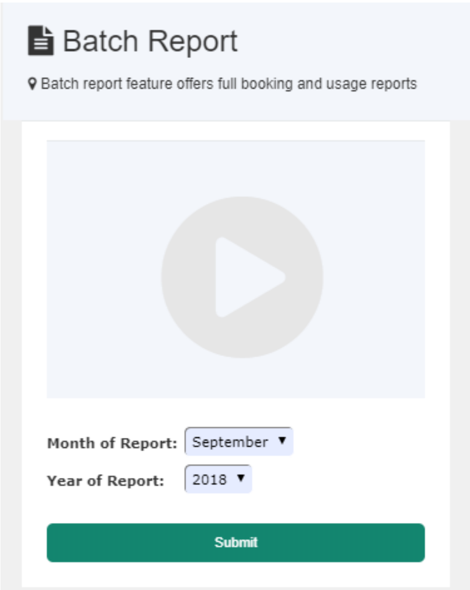


6.23.3 *Resource batch report*

Batch report is an automated monthly booking data reporting tool that gathers data from a selected month. Admins have the option to run the report generation overnight or immediately.

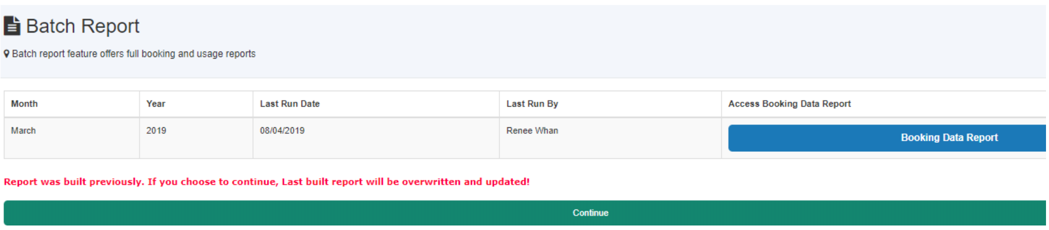
- Step 1:

Select **Month** and **Year**, choose if you would like to generate the report Overnight or Now, and then click on **Accept**.

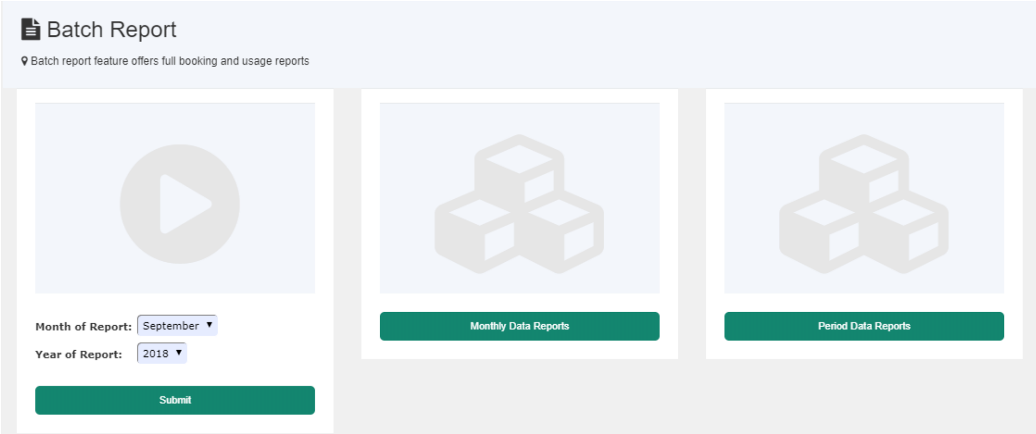


- Step 2:

If the system detects that a previously generated report already exists, it alerts you with a confirmation request. Otherwise, if this is the first generated report for this period, you will be able to access the newly generated report.



Accessing previously generated reports can be done through the ***Access Batch Data Reports*** button. The system orders the reports by year.



The system provides sorting options to assist with your reporting needs. The following hour calculations are available:

- Sum session booked hours
- Calculate booked hours within the selected month or selected period

6.23.4 Sample Report

Sample reports provide data summaries for monthly closed sample jobs.

6.23.5 Training Certificate Report

Managers and admins can access a summary of training certificate details.

Go to ***Report Manager -> Training Certificate report***. You can filter and export reports such as OHS reports and compliances. There are additional filter options, such as viewing expired certificates.

- Monthly active training certificate report
- Period active training certificate report
- Active user training certificate report
- Expired training certificate report
    - Expired monthly training certificate report
    - Expired period training certificate report

6.24 Generate Invoice Statement

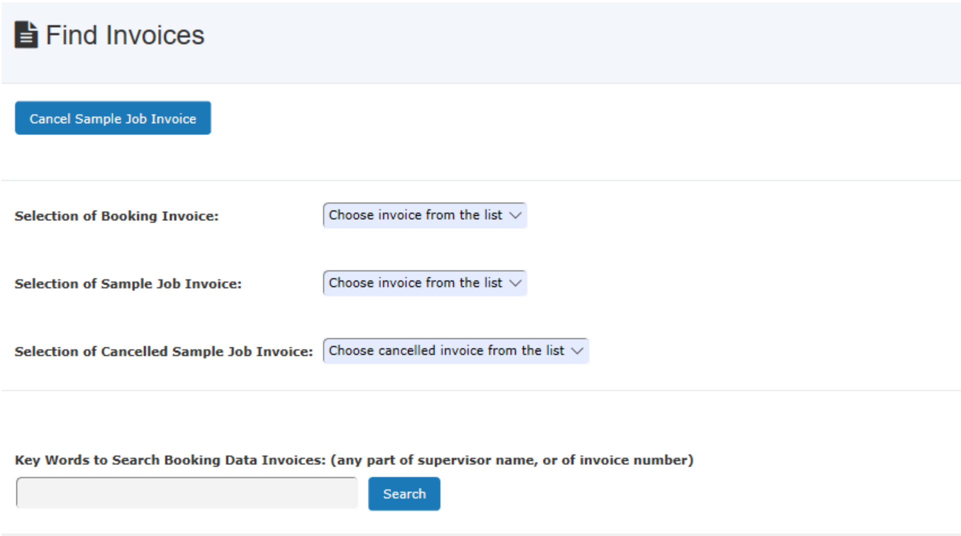
Click on ***Invoice Manager*** to see available invoicing options. The options depend on the system configuration e.g. booking data or usage (log) data. Each invoice statement is set up per supervisor.

In general, there are two options for invoicing statements:

- Manual: you can manually generate invoice statements related to booking data or usage log data, as well as for sample jobs.

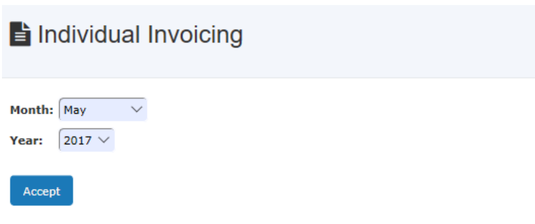
- Batch: through ***Resource Batch Invoicing***, an admin can complete a batch invoicing job with minimal steps.

Supervisors can access their own invoice statements when they log on to ACLS. For that supervisor, the system lists all invoices related to Booking Invoice Statement/Usage Invoice Statement, and Sample Service Invoice Statement (if any).



6.24.1 Supervisor Invoice Snapshot: Booking Data

Click on ***Individual Booking Invoicing***. The Supervisor Invoice groups up bookings or session time for users under a particular supervisor.



STATEMENT: July 2020

SUPERVISOR: Belinda Ferrari

TEL: (+61 2) 9385 2032

FAX:

EMAIL: b.ferrari@unsw.edu.au

DATE: August 31, 2020

DETAILS:

This Statement covers the work by your groups in July 2020.

Details of Bookings:

User	Resource	Booking Start Time	Booking End Time	Account	Booked Hours
Carolina Gutierrez Chavez	600 NMR - Ernst	07/07/2020 11:00	07/07/2020 14:00	UNSWA-BABS-RE254-RG162199	3.00

Summary of Bookings:

Resource	User	Account	Resource Charge/Hour	Booked Hours	Charges
600 NMR - Ernst	Carolina Gutierrez Chavez	UNSWA-BABS-RE254-RG162199	$14.46	3.00	$43.38
Sub-Total				3.00	$43.38
TOTAL				3.00	$43.38

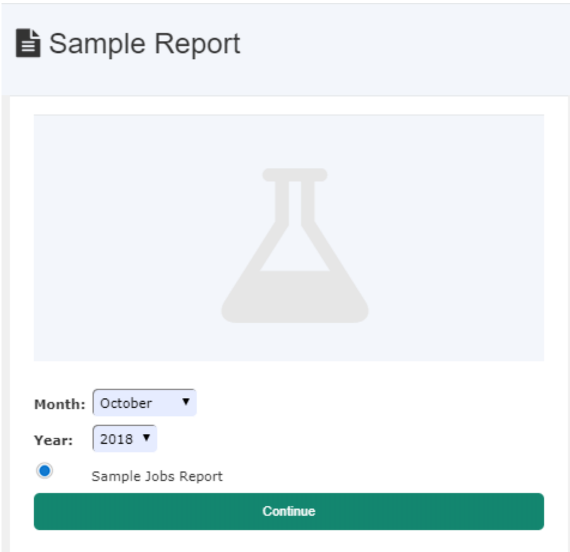
An internal transfer from the fund details you have provided will be organized. Details are as follows:

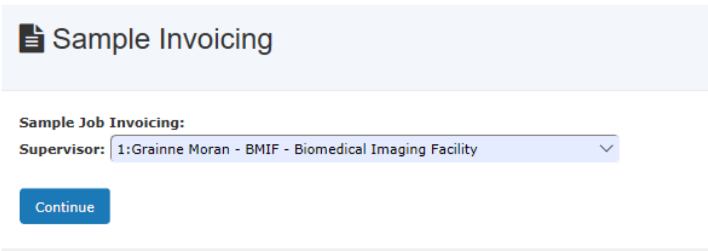
Account	Charges
UNSWA-BABS-RE254-RG162199	$43.38

Invoice No: 00002424

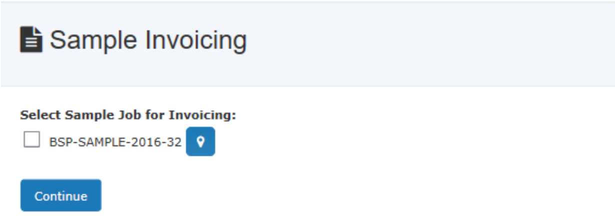
6.24.2 Supervisor Invoice Snapshot: Sample Jobs

Click on ***Sample Job Invoicing***.



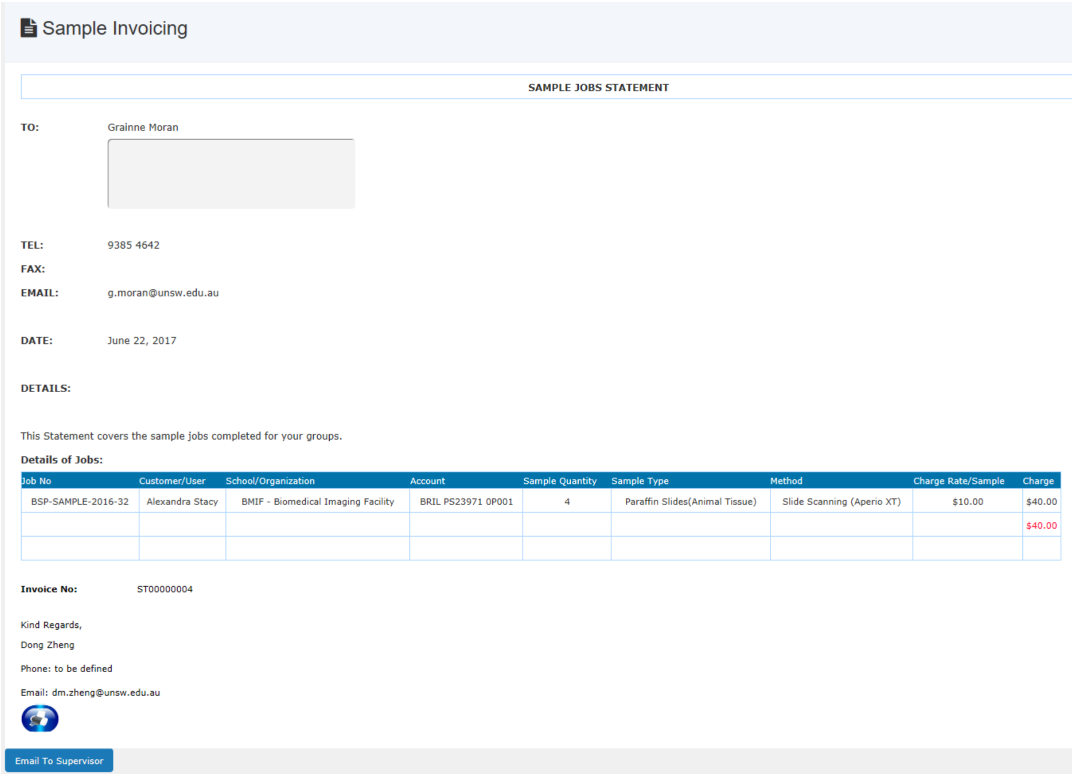


Select a supervisor. A list of all the completed jobs under this selected supervisor will be displayed. The information box can be clicked for further information about that job.



You can select multiple jobs for the same invoice. To do so, tick the required checkboxes and click **Continue.**

A Sample Job Invoice will cover the individual details of each sample job, all together grouped up as a table.



Sample Invoicing

SAMPLE JOBS STATEMENT

TO: Grainne Moran

TEL: 9385 4642
FAX:
EMAIL: g.moran@unsw.edu.au

DATE: June 22, 2017

DETAILS:

This Statement covers the sample jobs completed for your groups.

Details of Jobs:

Job No	Customer/User	School/Organization	Account	Sample Quantity	Sample Type	Method	Charge Rate/Sample	Charge
BSP-SAMPLE-2016-32	Alexandra Stacy	BMIF - Biomedical Imaging Facility	BRIL PS23971 0P001	4	Paraffin Slides(Animal Tissue)	Slide Scanning (Aperio XT)	$10.00	$40.00
								$40.00

Invoice No: ST00000004

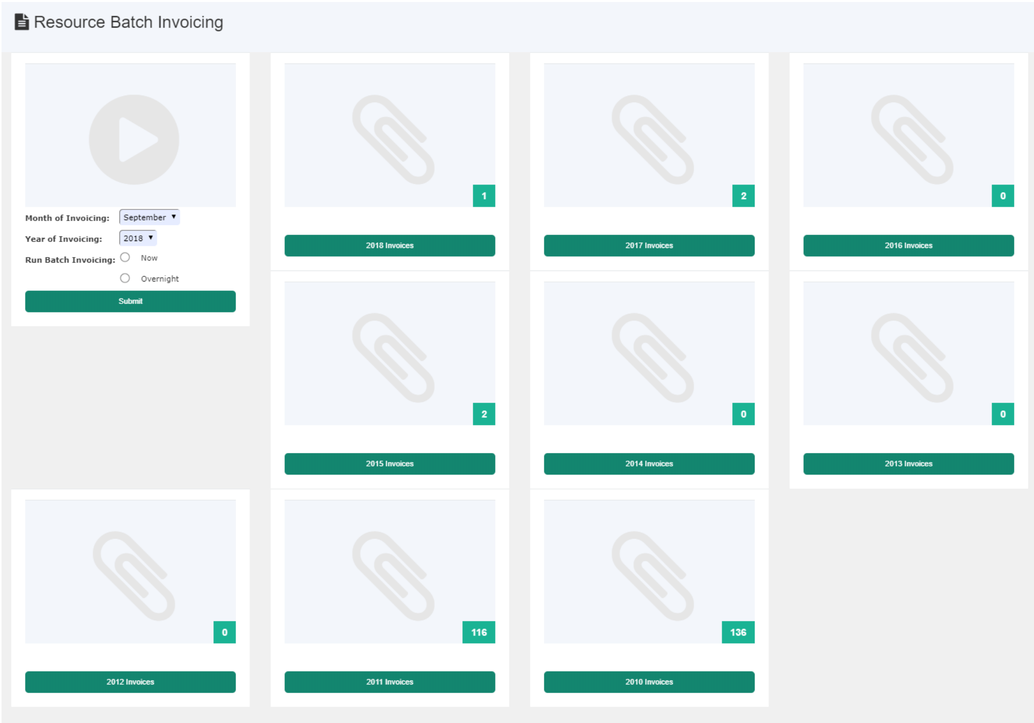
Kind Regards,
Dong Zheng
Phone: to be defined
Email: dm.zheng@unsw.edu.au

Email To Supervisor

6.24.3 *Resource Batch Invoicing*

Admins can run a resource batch invoice either immediately or overnight. You will receive an email notice when the job finishes running. On the right-hand side of the screen, there is a small information box to guide you.

You can access the invoices through ***Access Month Invoice Statements***.



Click on “Invoice Statements” to access that month’s invoices. The invoices are given as a table with individual links to each invoice.

Month	Year	Supervisor	Supervisor Email	School/Org	Invoice Link	Run By	Email Statement To Supervisor
February	2021	Caroline Rae (Lindy)	c.rae@unsw.edu.au	Medical Sciences	00002598	Adelle Amoore	☐
February	2021	Chuan Zhao	chuan.zhao@unsw.edu.au	Chemistry	00002599	Adelle Amoore	☐
February	2021	Donald Thomas	donald.thomas@unsw.edu.au	Analytical Centre	00002600	Adelle Amoore	☐
February	2021	Fraser Stoddart		Chemistry	00002601	Adelle Amoore	☐
February	2021	Graham Ball	g.ball@unsw.edu.au	Chemistry	00002602	Adelle Amoore	☐
February	2021	Jason Harper	j.harper@unsw.edu.au	Chemistry	00002603	Adelle Amoore	☐
February	2021	Jian Pan	jian.pan@unsw.edu.au	Faculty of Engineering	00002604	Adelle Amoore	☐
February	2021	Jiangtao Xu		Faculty of Engineering	00002605	Adelle Amoore	☐
February	2021	Jon Beves	j.beves@unsw.edu.au	Chemistry	00002606	Adelle Amoore	☐
February	2021	Jonathan Morris	jonathan.morris@unsw.edu.au	Chemistry	00002607	Adelle Amoore	☐
February	2021	Kourosh Kalantar-Zadeh	k.kalantar-zadeh@unsw.edu.au	Faculty of Engineering	00002608	Adelle Amoore	☐
February	2021	Les Field		Chemistry	00002609	Adelle Amoore	☐
February	2021	Luke Hunter	l.hunter@unsw.edu.au	Chemistry	00002610	Adelle Amoore	☐
February	2021	Martin Peeks	m.peeks@unsw.edu.au	Chemistry	00002611	Adelle Amoore	☐
February	2021	Martina Stenzel	m.stenzel@unsw.edu.au	Chemistry	00002612	Adelle Amoore	☐
February	2021	Muhammad Tauha Ali		Faculty of Engineering	00002613	Adelle Amoore	☐
February	2021	Naresh Kumar	n.kumar@unsw.edu.au	Chemistry	00002614	Adelle Amoore	☐
February	2021	Pall Thordarson	p.thordarson@unsw.edu.au	Chemistry	00002615	Adelle Amoore	☐
February	2021	Paul Munroe		Material Sci and Eng	00002616	Adelle Amoore	☐
February	2021	Rose Amal	mandalena@unsw.edu.au;r.amal@unsw.edu.au	ChemEng and IndChem	00002617	Adelle Amoore	☐
February	2021	Veena Sahajwalla	veena@unsw.edu.au	Material Sci and Eng	00002618	Adelle Amoore	☐
February	2021	William A Donald	w.donald@unsw.edu.au	Chemistry	00002619	Adelle Amoore	☐

☐ Tick to send a copy to self as record

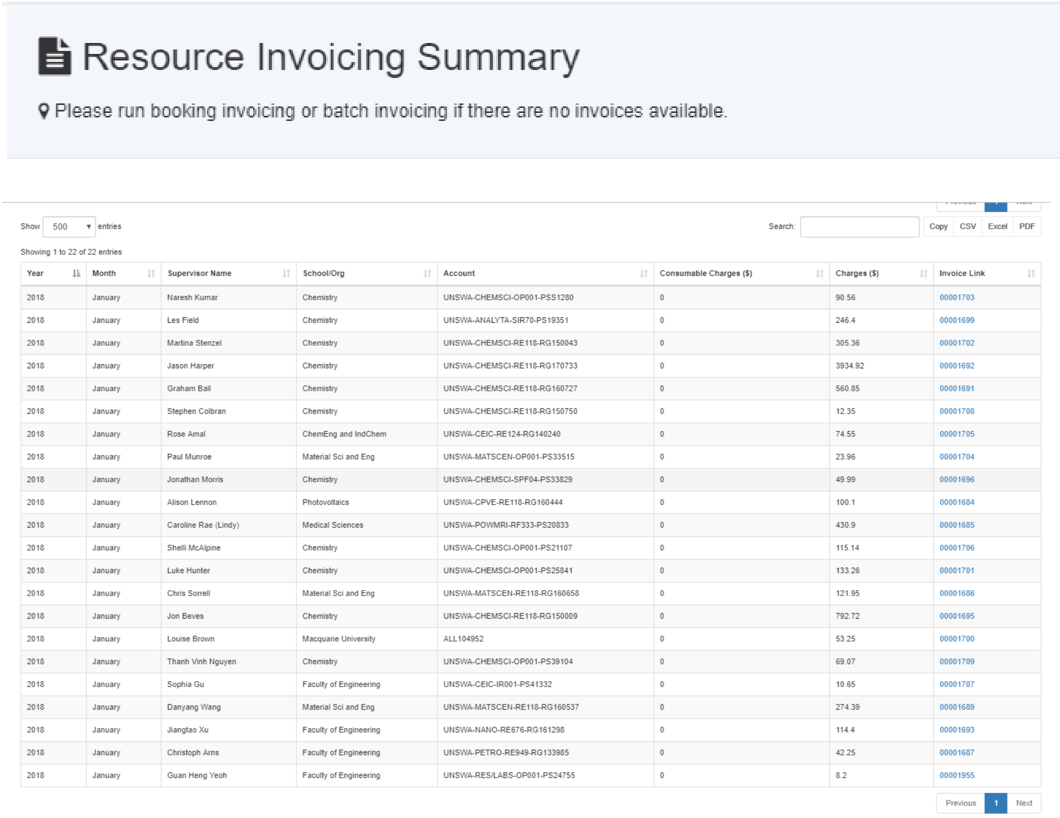
Email To Selected Supervisors

Email To All

You can email the invoice statements to a selection of supervisors or to everyone on the list. You can also send a copy to yourself.

6.25 Invoicing Summary

This feature is designed to make invoicing jobs easier for lab managers and admin staff. Admins can easily combine all invoices over a month or over a year. The invoice covers usage charges and consumable charges, as well as original invoices.

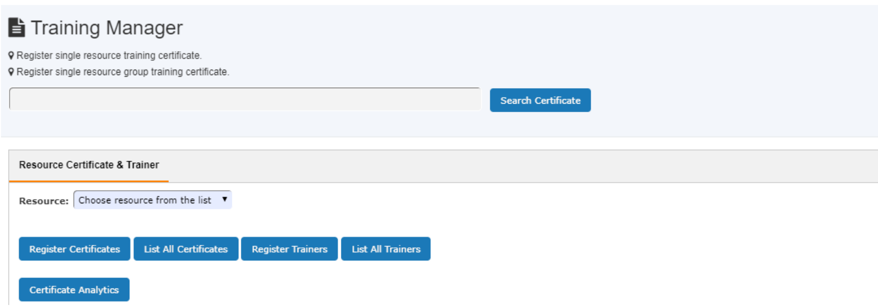


Year	Month	Supervisor Name	School/Org	Account	Consumable Charges ($)	Charges ($)	Invoice Link
2018	January	Naresh Kumar	Chemistry	UNSWA-CHEMSCI-OP001-PSS1280	0	90.56	00001703
2018	January	Les Field	Chemistry	UNSWA-ANALYTA-SIR70-PS19351	0	246.4	00001699
2018	January	Martina Stenzel	Chemistry	UNSWA-CHEMSCI-RE118-RG150043	0	305.36	00001702
2018	January	Jason Harper	Chemistry	UNSWA-CHEMSCI-RE118-RG170733	0	3934.92	00001692
2018	January	Graham Ball	Chemistry	UNSWA-CHEMSCI-RE118-RG160727	0	560.85	00001691
2018	January	Stephen Colbran	Chemistry	UNSWA-CHEMSCI-RE118-RG150750	0	12.35	00001708
2018	January	Rose Amal	ChemEng and IndChem	UNSWA-CEIC-RE124-RG140240	0	74.55	00001705
2018	January	Paul Munroe	Material Sci and Eng	UNSWA-MATSCEN-OP001-PS33515	0	23.96	00001704
2018	January	Jonathan Morris	Chemistry	UNSWA-CHEMSCI-SPF04-PS33829	0	49.99	00001696
2018	January	Alison Lennon	Photovoltaics	UNSWA-CPVE-RE118-RG160444	0	100.1	00001684
2018	January	Caroline Rae (Lindy)	Medical Sciences	UNSWA-POWMRI-RF333-PS20833	0	430.9	00001685
2018	January	Shelli McAlpine	Chemistry	UNSWA-CHEMSCI-OP001-PS21107	0	115.14	00001706
2018	January	Luke Hunter	Chemistry	UNSWA-CHEMSCI-OP001-PS25841	0	133.26	00001701
2018	January	Chris Sorrell	Material Sci and Eng	UNSWA-MATSCEN-RE118-RG160658	0	121.95	00001686
2018	January	Jon Beves	Chemistry	UNSWA-CHEMSCI-RE118-RG150009	0	792.72	00001695
2018	January	Louise Brown	Macquarie University	ALL104952	0	53.25	00001700
2018	January	Thanh Vinh Nguyen	Chemistry	UNSWA-CHEMSCI-OP001-PS39104	0	69.07	00001709
2018	January	Sophia Gu	Faculty of Engineering	UNSWA-CEIC-IR001-PS41332	0	10.65	00001707
2018	January	Danyang Wang	Material Sci and Eng	UNSWA-MATSCEN-RE118-RG160537	0	274.39	00001689
2018	January	Jiangtao Xu	Faculty of Engineering	UNSWA-NANO-RE676-RG161298	0	114.4	00001693
2018	January	Christoph Arns	Faculty of Engineering	UNSWA-PETRO-RE949-RG133985	0	42.25	00001687
2018	January	Guan Heng Yeoh	Faculty of Engineering	UNSWA-RES/LABS-OP001-PS24755	0	8.2	00001955

6.26 Set Up Trainers and Certificates

There are two ways to set up trainers and certificates: through ***Utilities*** -> ***Training Manager*** or through ***User Profile Manager -> User Profile***.

6.26.1 Training Manager



There are two kinds of certificates:

- Certificates per resource
- Certificates per resource group

There are two kinds of trainers:

- Trainers per resource
- Trainers per resource group

Select **Resource/Resource Group** from the drop-down list. **List All** gives an overview of all trainers and certificates.

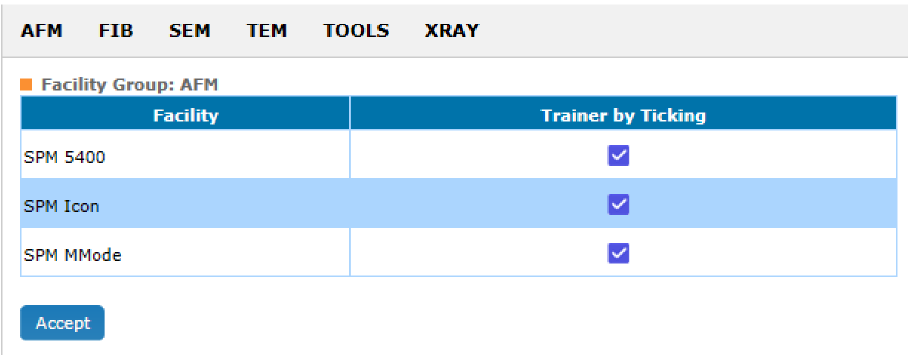
Group certificates supersede single resource certificates. The same rules apply to trainers. This means a group certificate grants a certificate to all resources in a group, regardless of the individual training status of each individual resource within that group.

If you need to enable a disabled certificate, you can go to ***Training Manager -> List All Certificate*** to enable. There will be an enable button by the certificate entry.

6.26.2 Trainer Registration

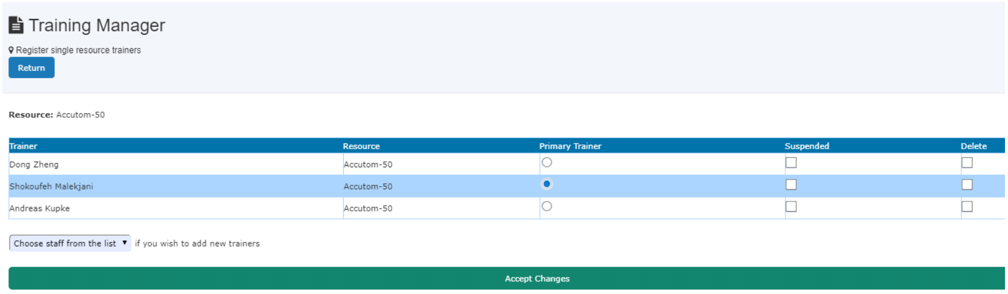
Through **Training Manager**, multiple staff can be set as one resource trainer at one go. Also, a trainer can be removed or be suspended if needed.

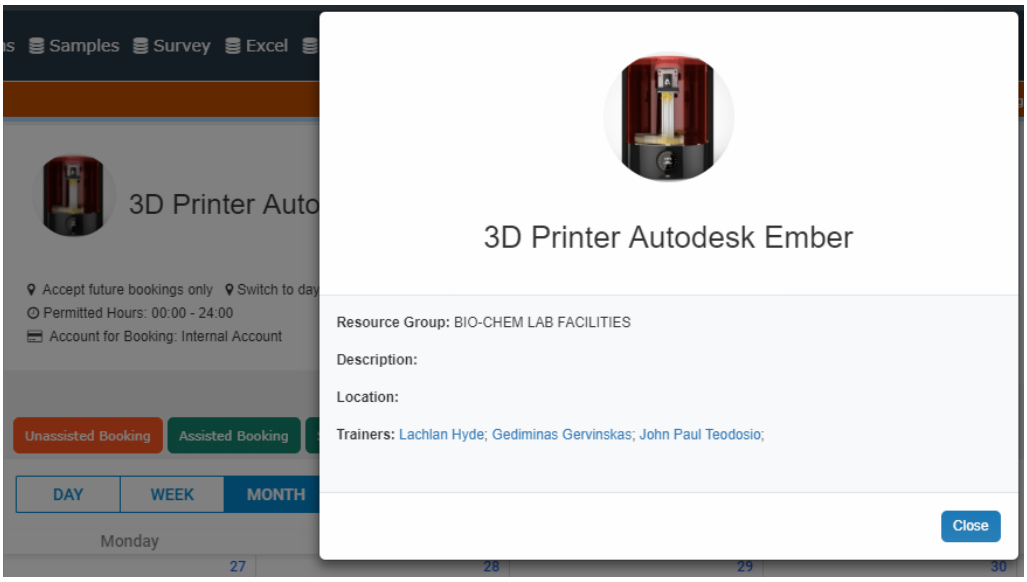
Go to **User Profile Manager**, click on edit for the staff profile, and go to the **Trainer** tab. You can check or uncheck each listed resource to add or remove the trainer status for that staff. This method allows you to quickly assign a staff member as a trainer for many resources at once.



6.26.3 Set Up Primary Trainer

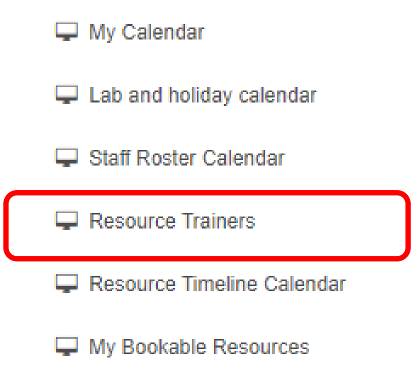
You can set a primary trainer when allocating trainers in the training manager. The primary trainer is the first trainer in the trainer contacts list. These lists can be found in the resource details of a calendar, or in the resource catalogue.





6.26.4 Find Resource Trainers

Click on ***Booking Resource -> Resource Trainers*** to access the full list of resources and their respective trainers.



6.26.5 Certificate Registration

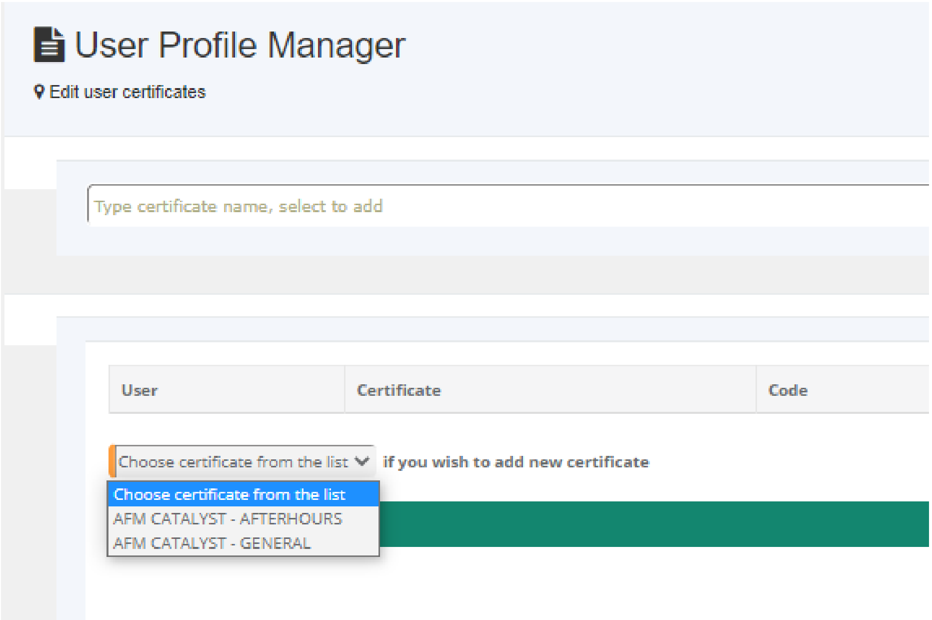
It is good practice to determine the certificate structure before registering a new certificate. ACLS requires the following certificate parameters:

Parameter	Description
Certificate Title	It is recommended to add the resource name into the certificate title for easy recognition.
Content/Details	Details of certificate
Max Hours/Day	Max permitted booking hours per day
Max Days/Period	Max permitted days from now
Max Hours/Period	Max permitted hours within Max Days/Period
Booking Start Time	Allowed start time on the day
Booking End Time	Allowed end time on the day
Booking End Time Offset	Refer to the chapter regarding booking offsets
Booking Cancellation	If unchecked, the booking can be cancelled anytime. If checked, bookings can be cancelled 24 hours before the start of the session
Weekend Booking	If checked, weekends can be booked. If unchecked, weekends cannot be booked
Valid Period	A time period imposed on the certificate that causes it to expire if the user hasn't logged in for the specified period of time. Counted in months. For example, if set to 2, the certificate will be disabled if the user hasn't logged in for 2 months.
Tracker Onsite Supervision	Note: only works with ACLS tracker
Booking alert	If checked, trainers receive an email notification for each booking
Certificate Invalid	Certificate expiry date
Last Update	Timestamp of most recent modification, with the name of the user who made the change.

Alternatively, it is you may find it easier to set up certificates through the ***Certificate/Group Certificate Wizard,*** which is a guided step by step process.

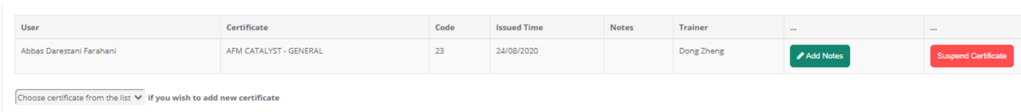
6.26.6 Edit User Certificates

You can add certificates to a user from ***User Profile -> Edit User Certificate.*** There is a live search box so that you can quickly find the right the certificate to add



6.26.7 *User Certification Notes*

You can record a note while assigning a certificate to a user. This will be recorded alongside the user’s training record. Only staff members will be able to see this note.



6.27 Appoint a User to Resource Trainer Status

Some labs may require non-staff users to be appointed as a resource trainer for the purposes of lab training, induction, and teaching work.

6.27.1 *Set up a user as a trainer*

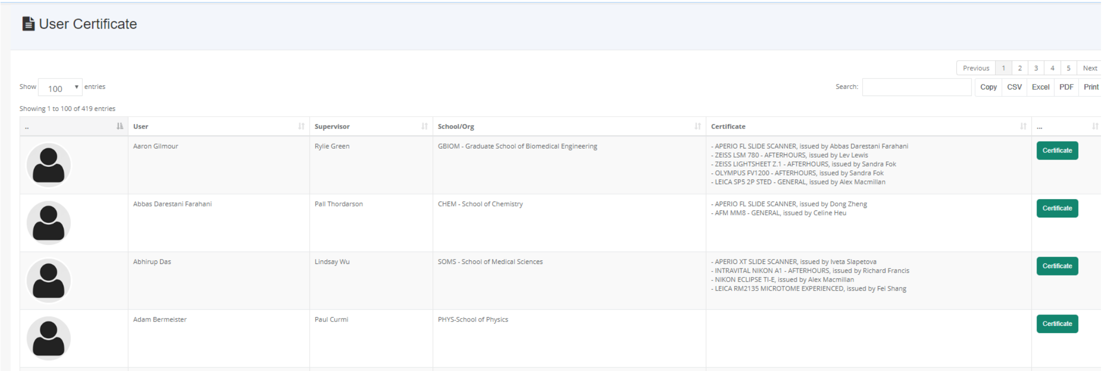
Step 1: In the Access Group Manager, set up a new access group and set the Group of Privilege to User Trainer Group. This permission group must be used to grant a user training privilege.

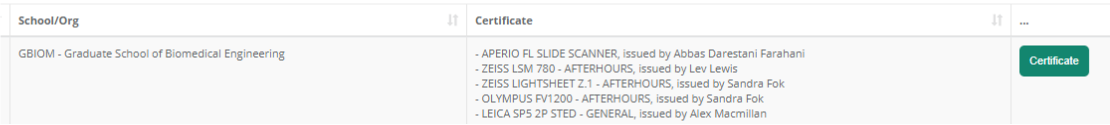
Step 2: In the user profile manager, assign the user's access group to the new group with the user trainer group privilege.

Step 3: In the training manager, the user will now be available to select as a trainer. Appoint the user as a trainer the same way you would appoint a staff member.

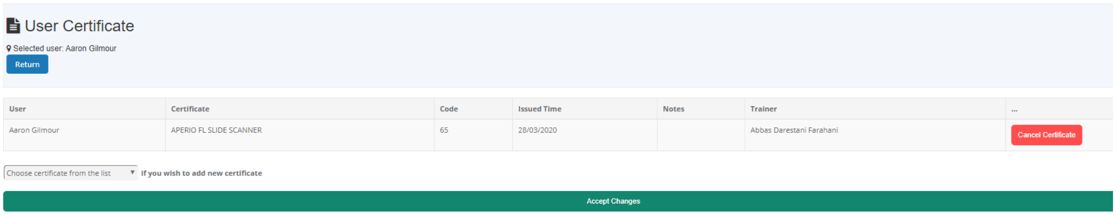
6.27.2 User trainer login

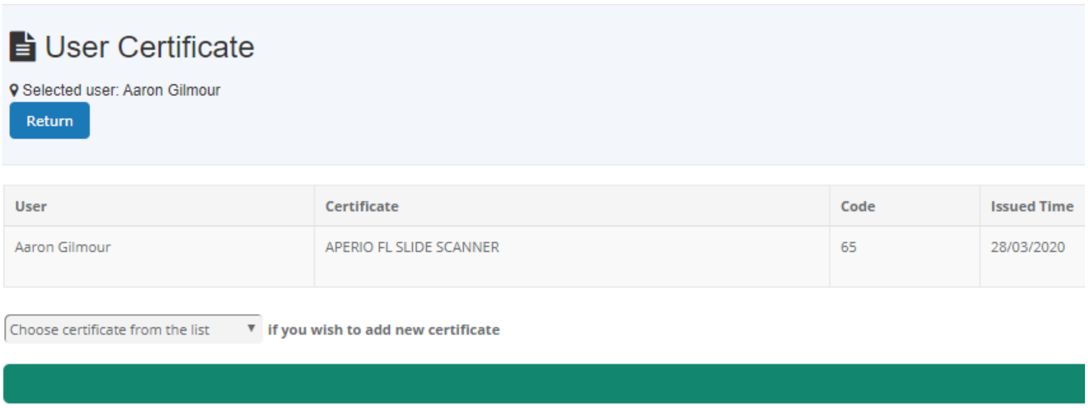
An appointed user trainer gains access to a user certificate overview page, showing a summary of all users and their certificates. This page is a separate certificate assignment page specifically for user trainers.

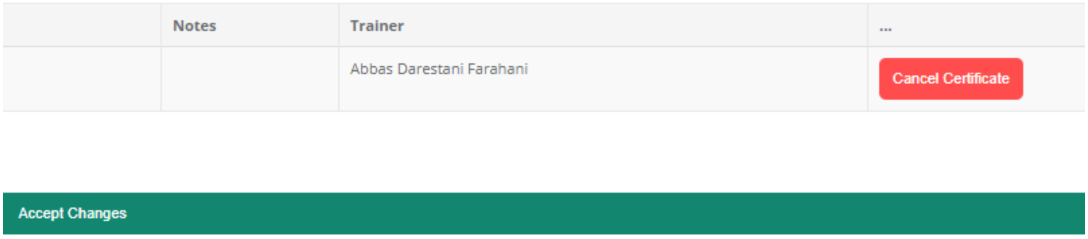




They can assign a certificate to a user by clicking the certificate button on a user's row in the overview table.

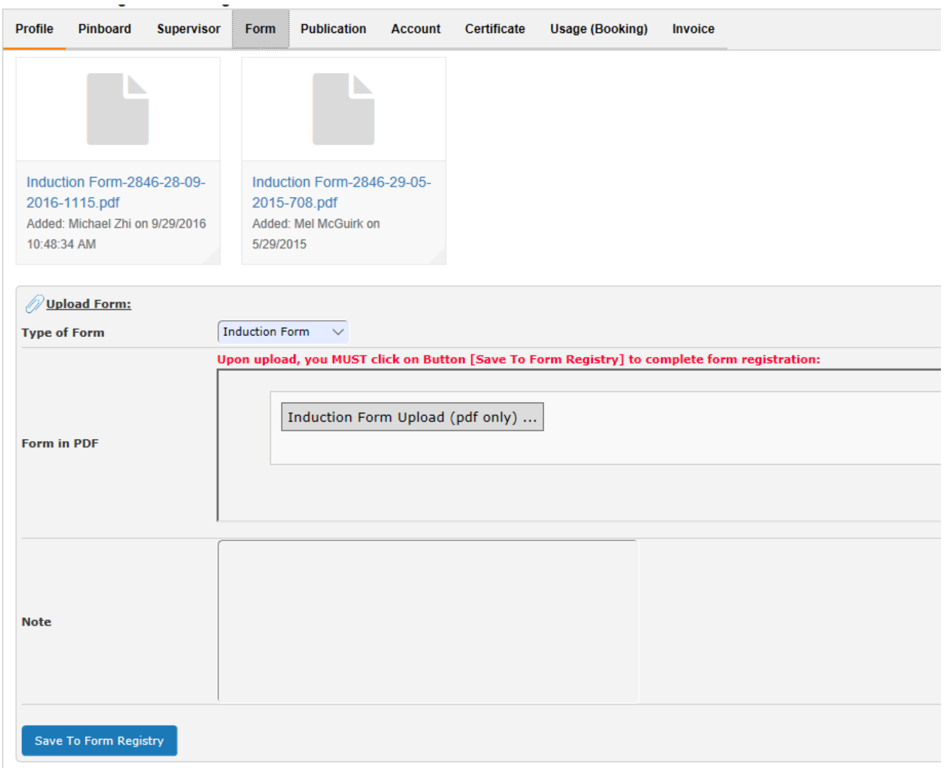






6.28 Record and Upload User Forms

Institutes may want to record user training forms and billing forms in ACLS, so that they can be referenced easily in the future. Through ***User Profile Manager***, go to the form section to add a form to the user's profile. This is done through a standard file upload. Previous uploads are also shown in this section.



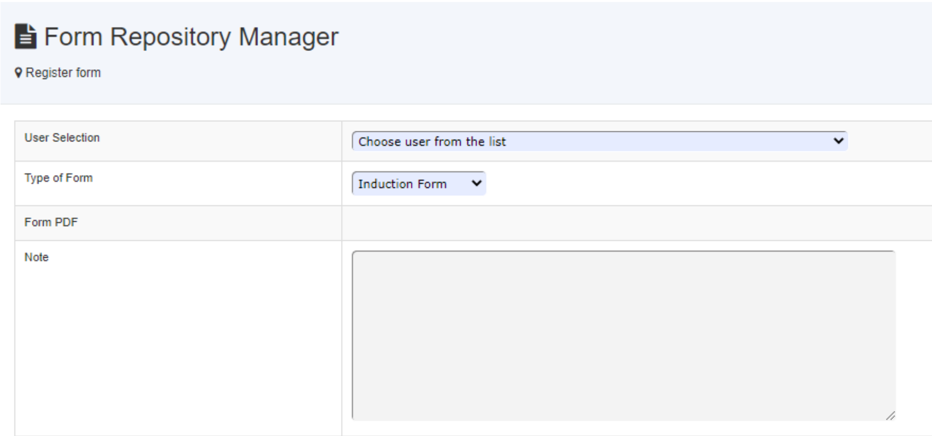
Through the ***Form Repository Manager***, you can register their forms. This can be used to centralize storage of signed procedures, forms, and other papers. Examples include:

- Induction forms
- OHS forms
- Access forms
- Subscription forms

You can also easily track, and access form records generated over the years. Within the Form Repository Manager, you have the following options:

- Register Forms:

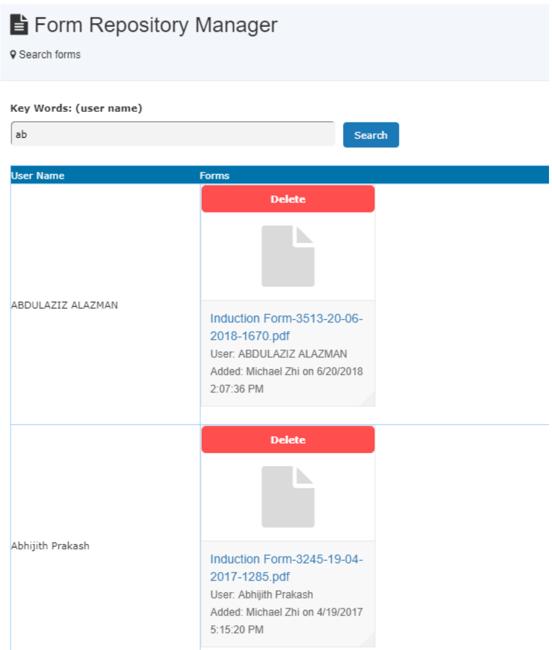
You can upload forms (PDF only) assigned to an individual user. There is no file limit.



Also, staff can access these forms on the ***Dashboard***. They can search forms by users if needed.

If the form is categorised as an Induction Form, then users with these files on their profile can also access them.

The system provides a means to remove unwanted forms and restore them if needed. There is a Delete button to remove a form, and there is a repository for deleted forms in case they need to be retrieved again.



6.29 Store and Share Documents

ACLS allows you to store and catalogue documents for secured access and sharing. In the ***Document Repository Manager***, you can register general documents and resource documents.

There are two types of documents:

- Resource documents are assigned to a resource. These appear on the catalogue page and on a booking instrument's calendar page.
- General documents are not assigned to any resource. They are accessible from the Documents section on the main Bookings Resources page.

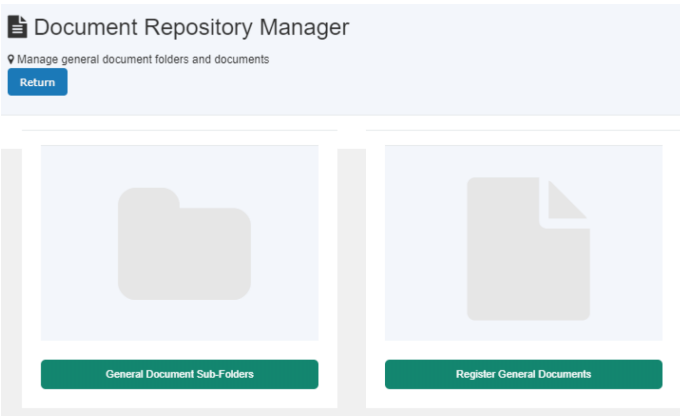
Access permissions for these documents are as follows:

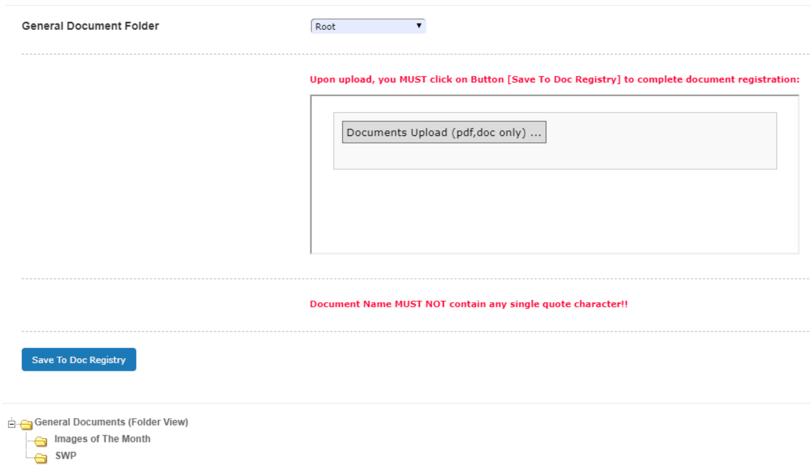
	Registered Users	Registered Staff
General Documents	All can access	All can access
Resource Documents	Users who have a resource training certificate, can access. Those who don't, cannot access	All can access

On the Documents Repository Manager, you can perform the following tasks:

- Register Resource Documents
- Register General Documents
- Add/Edit General Document Sub-Folders
- Search Documents
- View Deleted Document Records

Click on **General Documents** to register a new general document. In this section, you can edit the folder structure of the general documents page or upload a new general document.





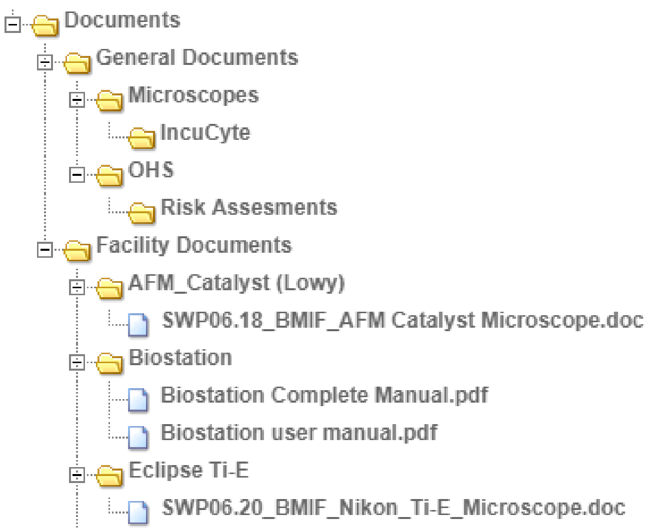
To upload a new general document through Register General Documents:

Step 1: Select the folder on your computer where the document is located, select the document, click on **Open** to upload.

Step 2: Click on **Save To Doc Registry** to register the documents to the system.

The system will return to the home page of ***Document Repository Manager*** and show you the document you just uploaded.

If you go to ***Booking tab -> Documents tile***, you can see the uploaded document.



Register Resource Document follows the same process. The only difference is that you must pick a resource first.

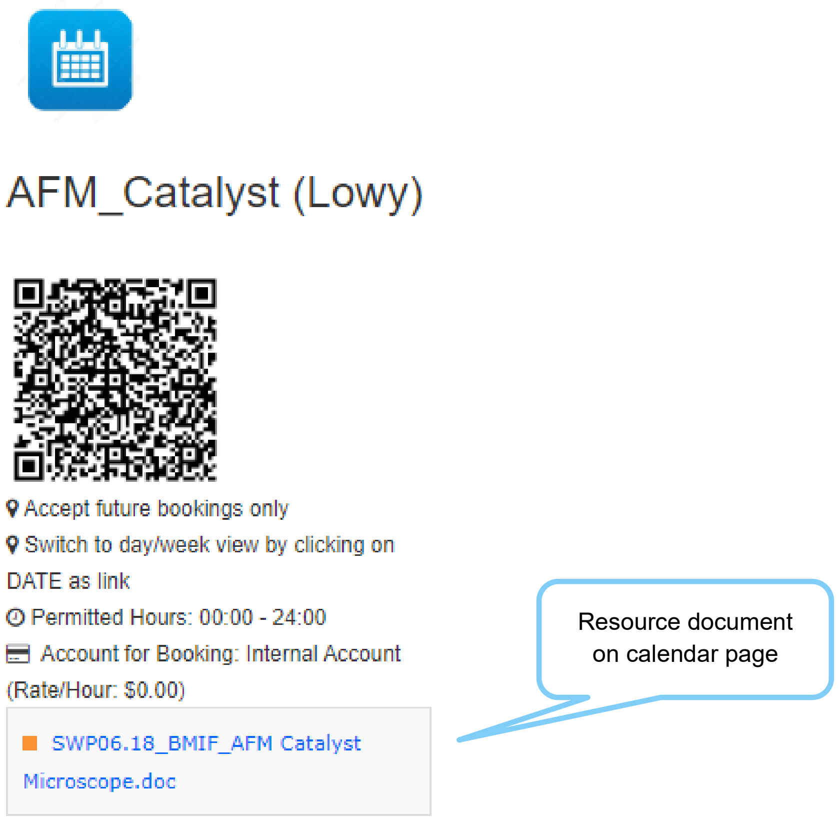
To search through the document repository, type in a few letters of the document name or resource name in the Search Documents section.

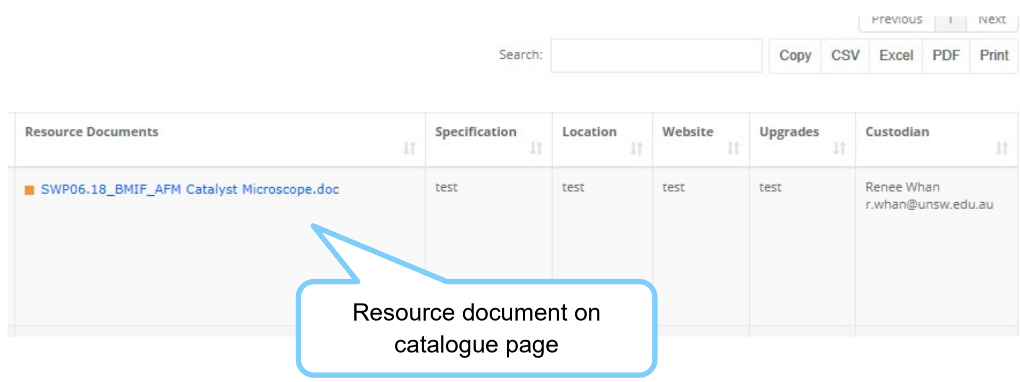
If you need to delete any unwanted files, click on ***Delete Unwanted Documents***. You can delete files from this page.

6.30 Resource Documents

Users can access resource documents on the Catalogue page and Calendar pages. It is recommended to add resource related documents to each resource. For example: OHS documents, training notes, safety notes, and operation tips.On the calendar page, the files will be located underneath the booking profile of the instrument.

On the catalogue page, the files will be in the Resource Documents column. Resource documents are uploaded through the ACLS Document Repository Manager.





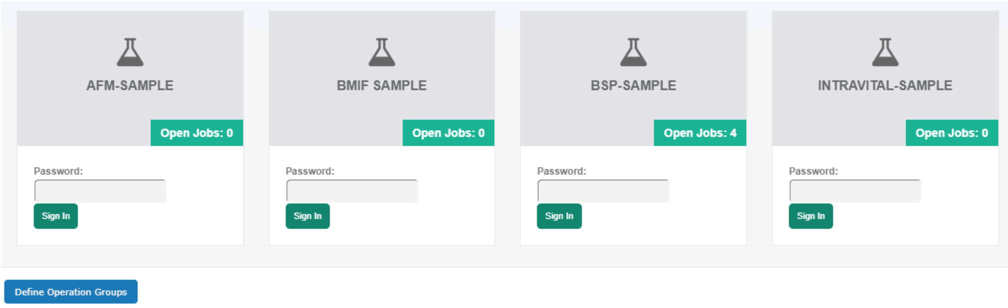
6.31 Samples

Samples provides the following options for tracking different types of sample work and analysis:

- Enclosed lab work: Customers/Users submit their prepared samples for analysis and processing
- Commercial Work: Customers/Users submit their unprepared samples for analysis and processing

Utilizing the ***Samples*** module enables you to record the analysis process systematically, archive and retrieve results, and generate billing reports.

Samples can record information for multiple groups. For example, one laboratory may have multiple units or groups completing sample tests and analyses. The Samples module can deal with the same sample jobs for different groups. For example, one lab could have 3 different units within the lab.



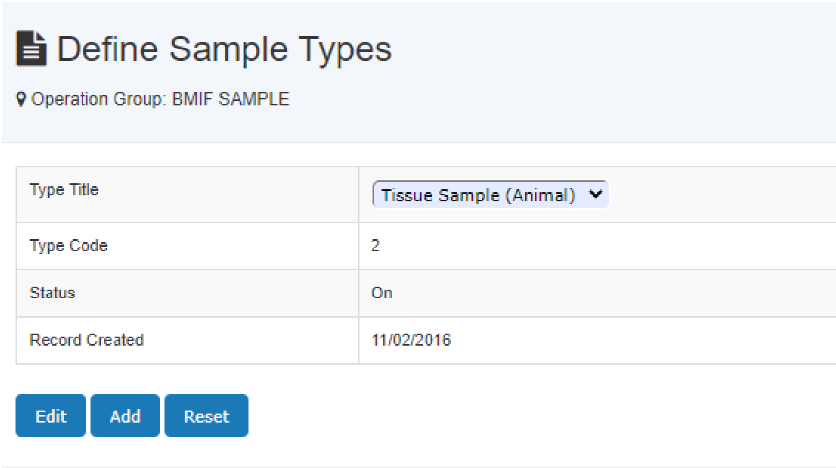
The process of setting up the sample's module is as follows:

- Create groups (System Administrator only):

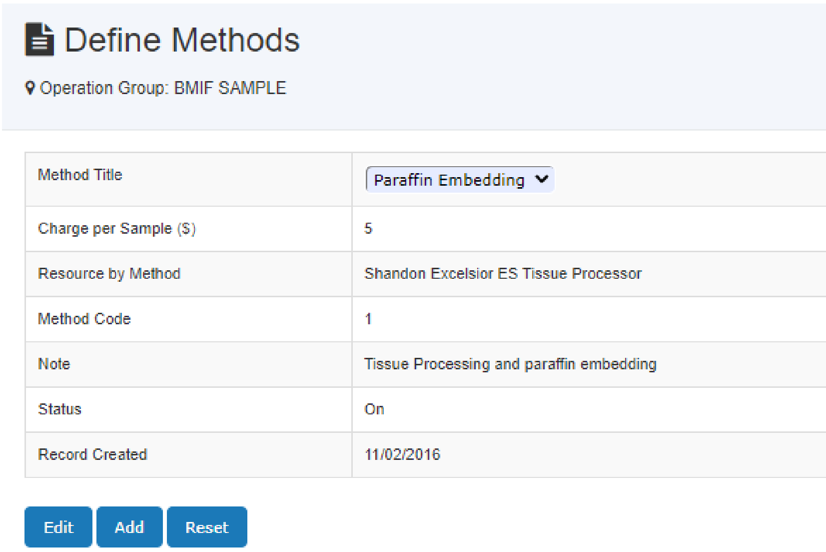
  You will need to select an operation group for the group. Each group is required to have a password to prevent unauthorized access.

- Create sample types:

  You can freely determine the categorisation of your samples. For example, a sample type could be defined as a category of material, like a steel sample or a tissue sample. The status determines whether the sample type is in use or not. The defined sample types cannot be deleted once they have been created, but they can be disabled with the status checkbox.



- Create methods of analysis. You can freely define names for the analysis methods used. For example, naming it after the lab resource used to run the analysis.



- Each method of analysis is linked to a resource and is allocated a charge per sample.
- The status determines whether the method is in use or not, operating identically to the status field of a sample type.

You can create new sample types or methods at any time. Once a sample type or method has been created, you will be able to check-in new samples and monitor their progress.

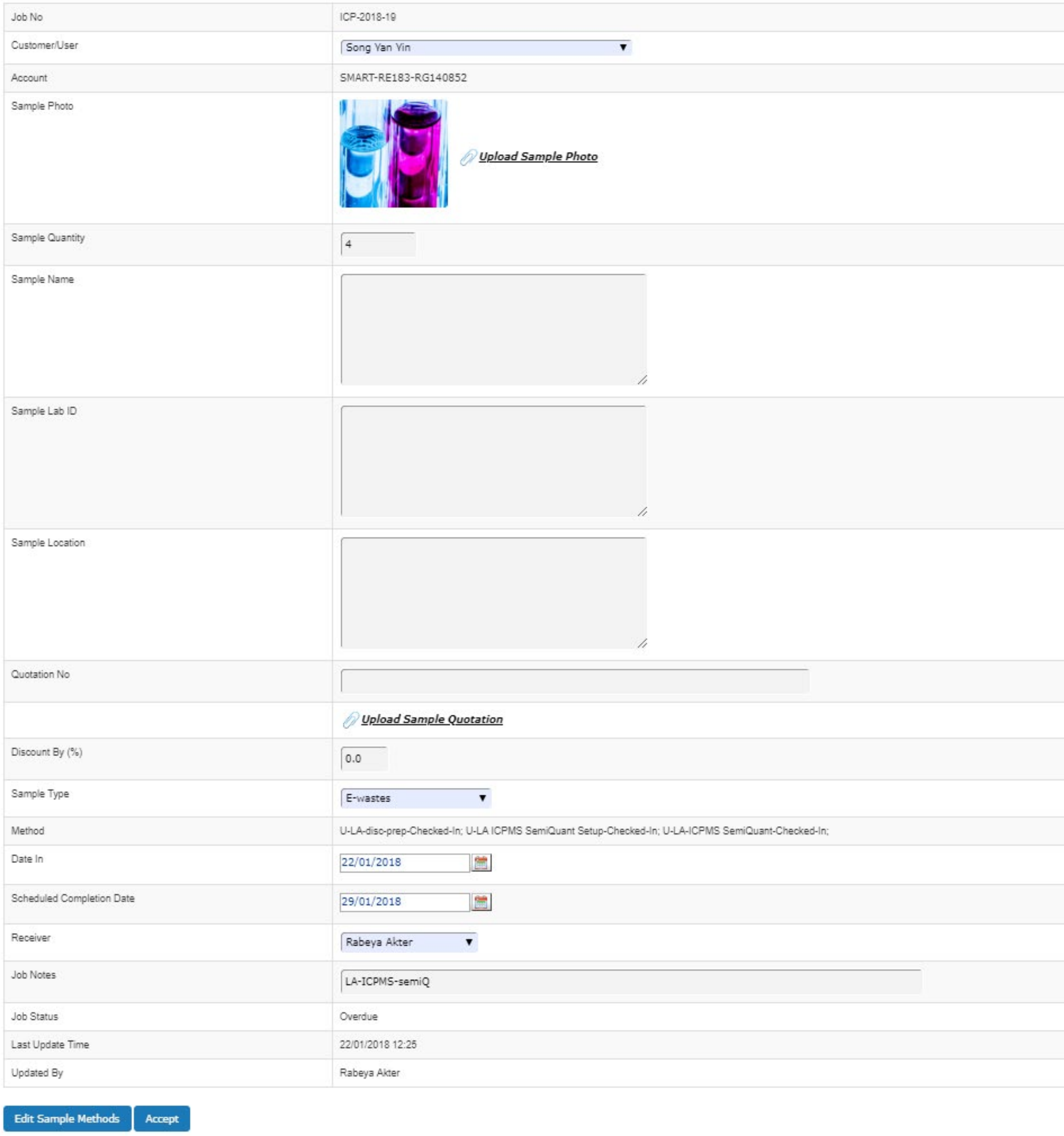
6.31.1 Check-in Samples

When samples are checked in, ACLS generates a unique job number to track the checked in samples. The format of the job number is: Group Name + Current Year + Incremental number. For example, ICP-2024-19.

Fill in the required fields on the check in form. You will need to select a customer for the job request, and a billing account.

Select **Accept** to check in the sample.

Once you have registered a new job, you will need to assign a method of analysis. Click **Edit Sample Methods** to add/edit methods, or to update the job details. On this page, you can choose from the methods dropdown to add a new method. A job can have multiple methods but only one sample type. You can set up a discount if needed.

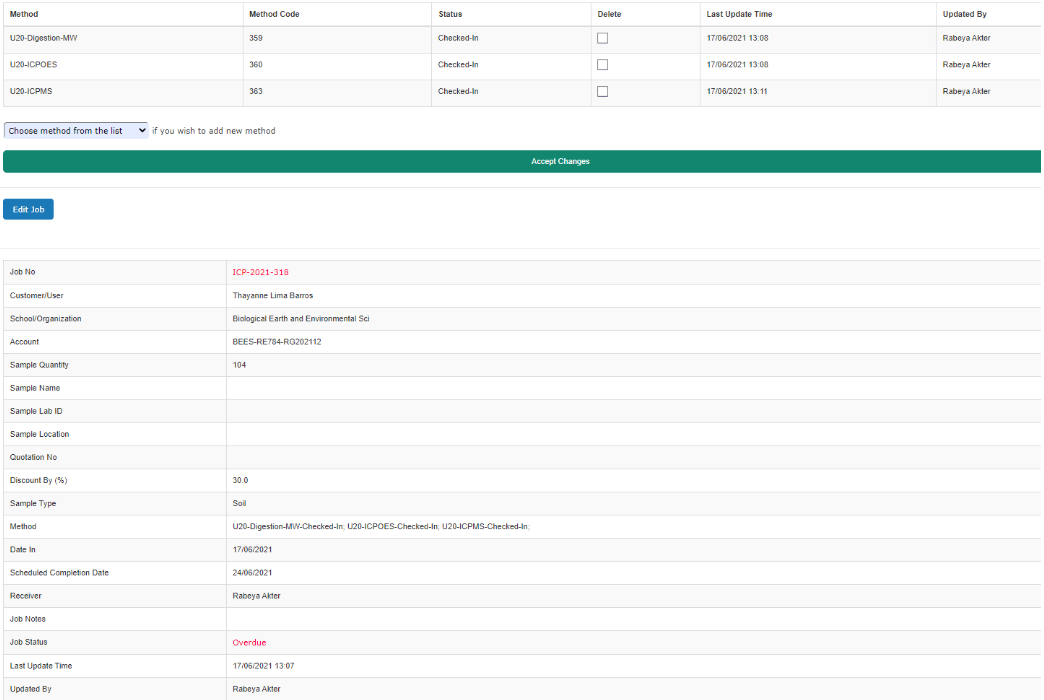


Job No	ICP-2018-19
Customer/User	Song Yan Yin
Account	SMART-RE183-RG140852
Sample Photo	Upload Sample Photo
Sample Quantity	4
Sample Name	
Sample Lab ID	
Sample Location	
Quotation No	
	Upload Sample Quotation
Discount By (%)	0.0
Sample Type	E-wastes
Method	U-LA-disc-prep-Checked-In; U-LA ICPMS SemiQuant Setup-Checked-In; U-LA-ICPMS SemiQuant-Checked-In;
Date In	22/01/2018
Scheduled Completion Date	29/01/2018
Receiver	Rabeya Akter
Job Notes	LA-ICPMS-semiQ
Job Status	Overdue
Last Update Time	22/01/2018 12:25
Updated By	Rabeya Akter

Edit Sample Methods | Accept

6.31.2 *Process Sample Jobs*

Jobs must be processed before they can be checked out. To process a job, go to Update Jobs and select a job. You will be presented a page containing job details and any methods that have been assigned to the job. The methods are selectable from the check box. If there are multiple methods, you will need to run them one at a time.



Method	Method Code	Status	Delete	Last Update Time	Updated By
U20-Digestion-MW	359	Checked-In	☐	17/06/2021 13:08	Rabeya Akter
U20-ICPOES	360	Checked-In	☐	17/06/2021 13:08	Rabeya Akter
U20-ICPMS	363	Checked-In	☐	17/06/2021 13:11	Rabeya Akter

Choose method from the list if you wish to add new method

Accept Changes

Edit Job

Job No	ICP-2021-318
Customer/User	Thayanne Lima Barros
School/Organization	Biological Earth and Environmental Sci
Account	BEES-RE784-RG202112
Sample Quantity	104
Sample Name	
Sample Lab ID	
Sample Location	
Quotation No	
Discount By (%)	30.0
Sample Type	Soil
Method	U20-Digestion-MW-Checked-In; U20-ICPOES-Checked-In; U20-ICPMS-Checked-In;
Date In	17/06/2021
Scheduled Completion Date	24/06/2021
Receiver	Rabeya Akter
Job Notes	
Job Status	Overdue
Last Update Time	17/06/2021 13:07
Updated By	Rabeya Akter

By default, ACLS includes the full quantity when processing. However, you may select a smaller number of samples. When processing, ACLS updates the charge per method based on the settings defined in the method.

Update Jobs

Operation Group: ICP

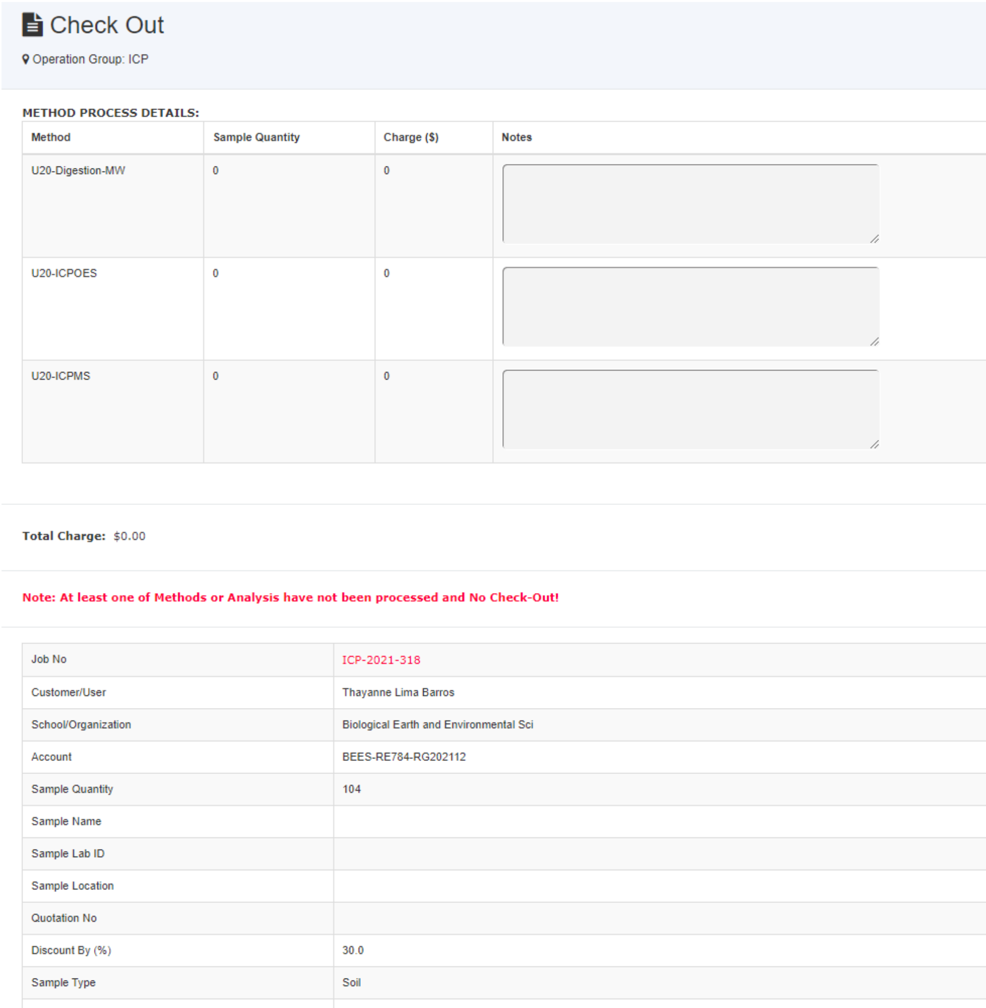
Processing Method for Job No. ICP-2021-318

Method	U20-Digestion-MW
Sample Quantity	1
Note	2000 (max char 2000)

Select the **Confirm** button. The status of the selected method will be marked as **Processing.**

6.31.3 Check-out Samples

A job can only be checked out when all assigned methods are processed or updated. Otherwise, ACLS will reject the check-out request. After processing the samples, go to the Check Out tab and select a job to check out.



Check Out

Operation Group: ICP

METHOD PROCESS DETAILS:

Method	Sample Quantity	Charge ($)	Notes
U20-Digestion-MW	0	0	
U20-ICPOES	0	0	
U20-ICPMS	0	0	

Total Charge: $0.00

Note: At least one of Methods or Analysis have not been processed and No Check-Out!

Job No	ICP-2021-318
Customer/User	Thayanne Lima Barros
School/Organization	Biological Earth and Environmental Sci
Account	BEES-RE784-RG202112
Sample Quantity	104
Sample Name	
Sample Lab ID	
Sample Location	
Quotation No	
Discount By (%)	30.0
Sample Type	Soil

Review the job details and then select the **Check-out** button. After check-out, no more updates can be made to the job.

6.31.4 Upload Sample Analysis Results

ACLS has the capability to upload reports or documents for archival purposes. These documents will be archived, stored, and backed up on the central ACLS server.

Upload Job Results

Operation Group: ICP

JOB DETAILS:

Job No	ICP-2018-10
Customer/User	Terry Flynn
School/Organization	Analytical Centre
Account	CCL-ACCOUNT-2014
Sample Quantity	50
Sample Name	
Sample Lab ID	
Sample Location	
Quotation No	
Sample Type	Swab
Method	TF-IC-Checked-Out; TF-IC-set up-Checked-Out; TF-OES-Checked-Out;
Date In	10/01/2018
Scheduled Completion Date	17/01/2018
Date Out	17/01/2018
Receiver	Dorothy Yu
Job Notes	Swab
Job Status	Checked-Out
Last Update Time	11/01/2018 12:09
Updated By	Dorothy Yu

Doc-ICP-2018-10,xlsx
Description: Report-ICP-2018-10
Job No.: ICP-2018-10
Updated: 11/01/2018 12:09
By: Dorothy Yu

ACLS limits documents to one document per file type. For example, Job #1 can have Doc_ICP_2009_1**.doc**, and Doc_ICP_2009_1**.xls**, and Doc_ICP_2009_1**.pdf**, and Doc_ICP_2009_1**.zip**, but not two **.doc** type documents.

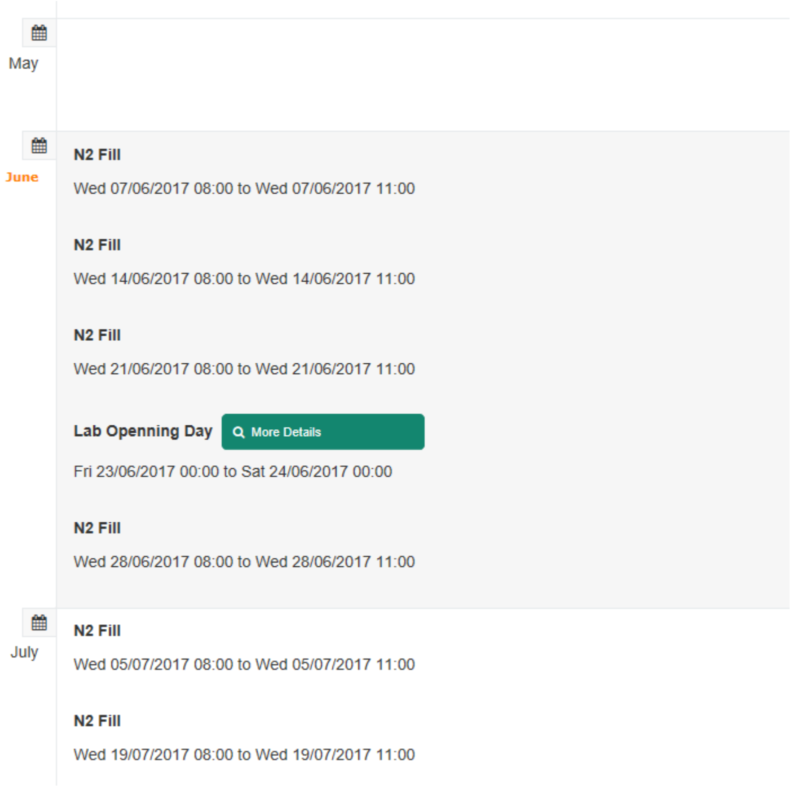
- To upload a file:
    - Select the **Document Type** using the drop-down list.
    - Write a Download Link Description. The Download Link Description is shown alongside the file's download link.
    - Select **Browse** to locate the report on your local computer.
    - Select **Upload** to complete the upload. To verify the upload was successful, try clicking the link in the column Download Link Description.

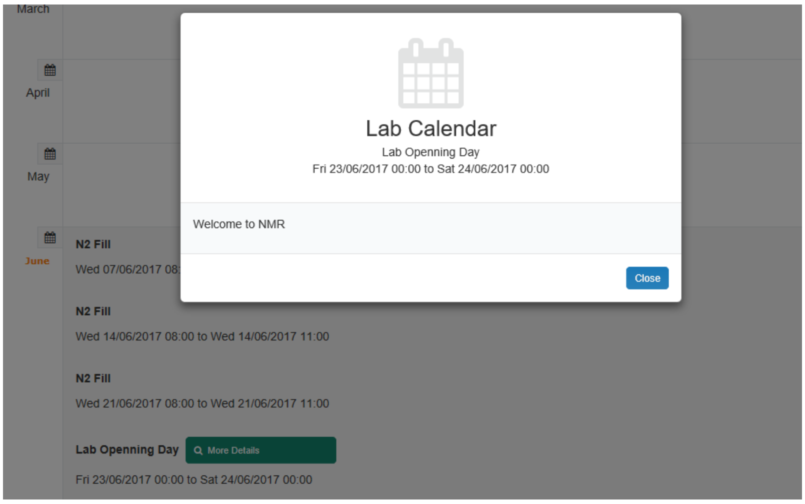
6.32 Set Up Event & Holiday Calendar

Lab calendar is a handy tool for notifying users about public holidays and special lab events. Public holidays can be shown on the calendar, and lab events can be shown through ***Dashboard***.

Go to ***Booking Tab -> Lab Event & Holiday Calendar*** to set up the event calendar. You can set up events and holidays for the current year, last year and next year.

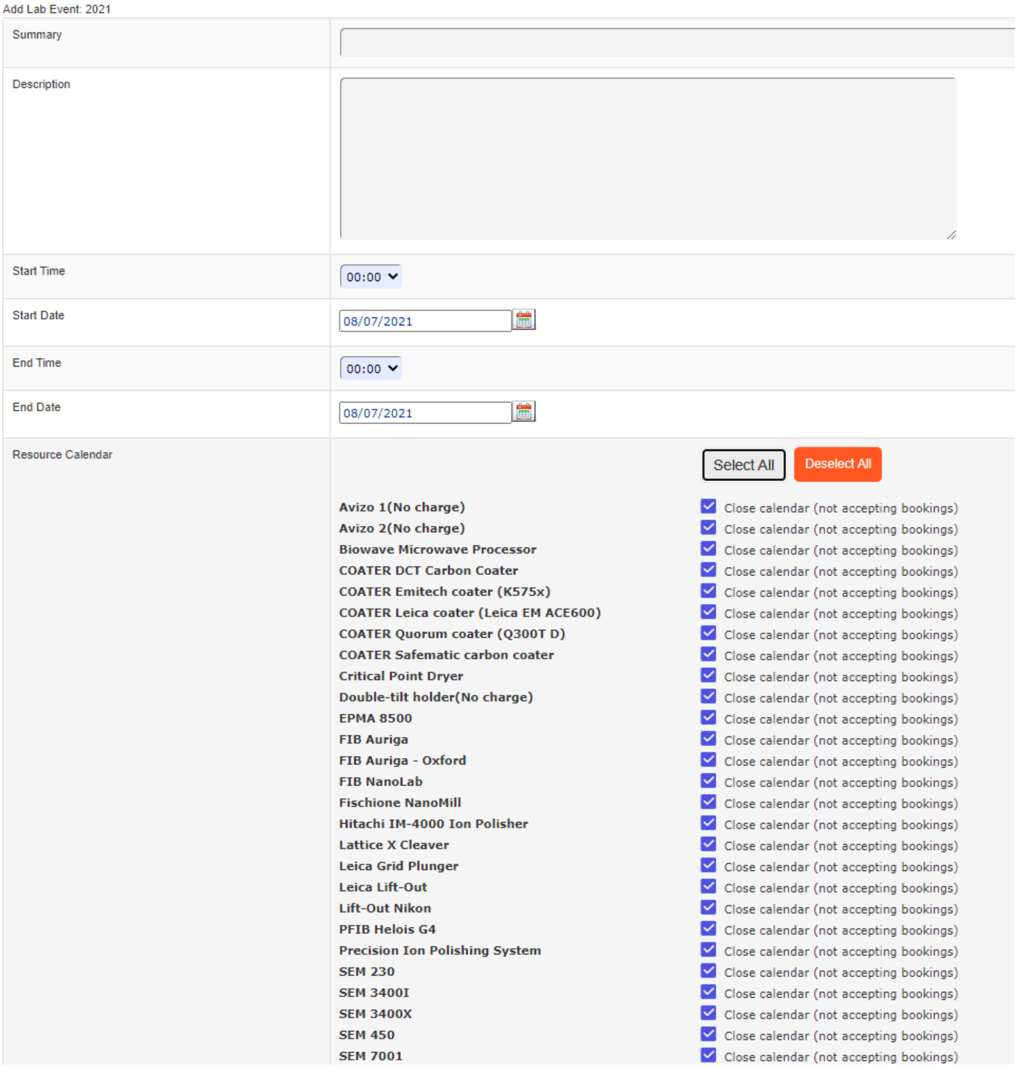
Users can also access the Lab Event Calendar on ***My Home***. If the calendar is set up with additional info, click on ***More Details*** to see the info on a popup menu.





You can enable or disable any resource booking calendars for a defined period. For example, if you need to shut down any resources because of special events or holidays, you can prevent bookings during this period using the Lab Event Calendar.

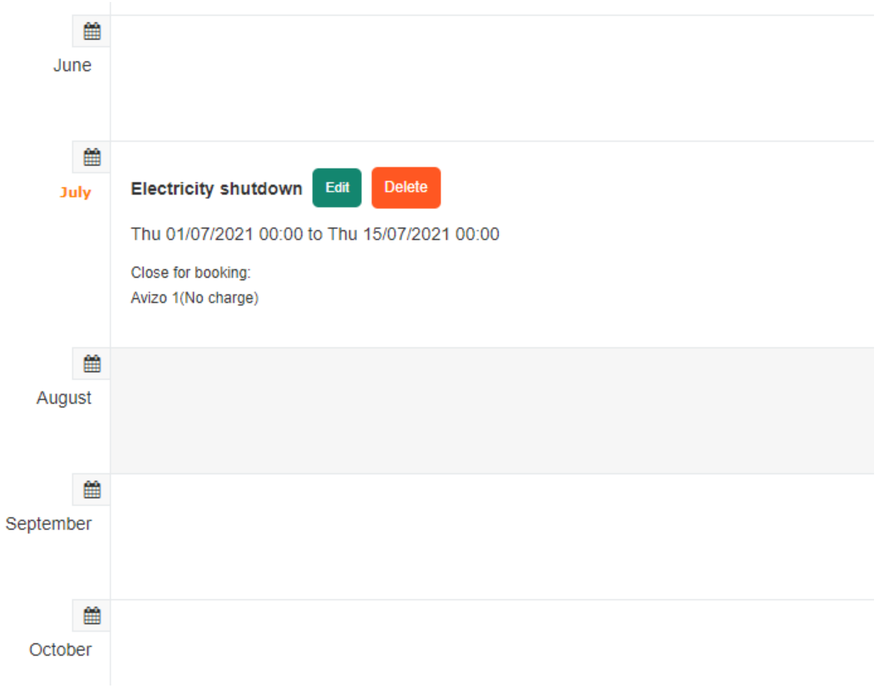
The availability status is listed for each device when modifying the event. Use the Select All button or manually check individual resources to disable bookings during the event.


Add Lab Event: 2021

Summary	
Description	
Start Time	00:00
Start Date	08/07/2021
End Time	00:00
End Date	08/07/2021
Resource Calendar	Select All Deselect All

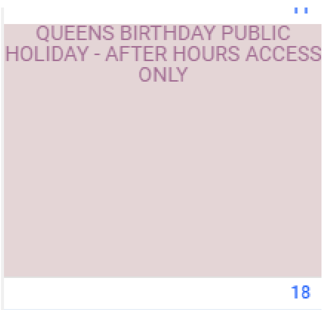
Avizo 1(No charge)	Close calendar (not accepting bookings)
Avizo 2(No charge)	Close calendar (not accepting bookings)
Biowave Microwave Processor	Close calendar (not accepting bookings)
COATER DCT Carbon Coater	Close calendar (not accepting bookings)
COATER Emitech coater (K575x)	Close calendar (not accepting bookings)
COATER Leica coater (Leica EM ACE600)	Close calendar (not accepting bookings)
COATER Quorum coater (Q300T D)	Close calendar (not accepting bookings)
COATER Safematic carbon coater	Close calendar (not accepting bookings)
Critical Point Dryer	Close calendar (not accepting bookings)
Double-tilt holder(No charge)	Close calendar (not accepting bookings)
EPMA 8500	Close calendar (not accepting bookings)
FIB Auriga	Close calendar (not accepting bookings)
FIB Auriga - Oxford	Close calendar (not accepting bookings)
FIB NanoLab	Close calendar (not accepting bookings)
Fischione NanoMill	Close calendar (not accepting bookings)
Hitachi IM-4000 Ion Polisher	Close calendar (not accepting bookings)
Lattice X Cleaver	Close calendar (not accepting bookings)
Leica Grid Plunger	Close calendar (not accepting bookings)
Leica Lift-Out	Close calendar (not accepting bookings)
Lift-Out Nikon	Close calendar (not accepting bookings)
PFIB Helois G4	Close calendar (not accepting bookings)
Precision Ion Polishing System	Close calendar (not accepting bookings)
SEM 230	Close calendar (not accepting bookings)
SEM 3400I	Close calendar (not accepting bookings)
SEM 3400X	Close calendar (not accepting bookings)
SEM 450	Close calendar (not accepting bookings)
SEM 7001	Close calendar (not accepting bookings)

To re-open the resource calendar, you need to delete the lab event.



- Set up public holiday:

  ACLS can set up public holiday blocks on the calendar. When setting up a public holiday, tick the public holiday checkbox. Being marked a public holiday does not prevent users booking events on the day. You must manually close bookings for chosen resources if you want to block users. When a public holiday is set, that date on the booking calendar will have the public holiday notice on it.



6.33 Training & Support

There is a built-in ticketing service in ACLS. Users can submit support tickets in 3 categories: training, support, and sample. Users can track the status of their tickets, and the responses made by staff.

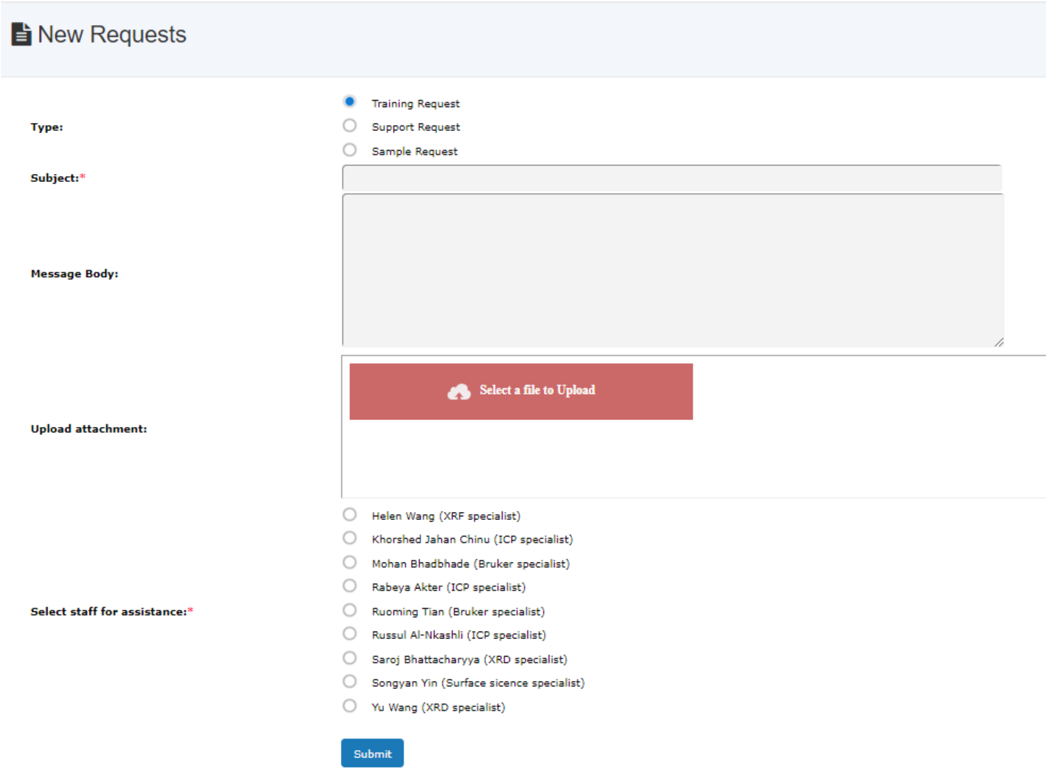
The functions for operating the system are as follows:

- New Request: open to all users
- My Requests: open to all users
- Open Requests: staff only

- Search tickets: staff only

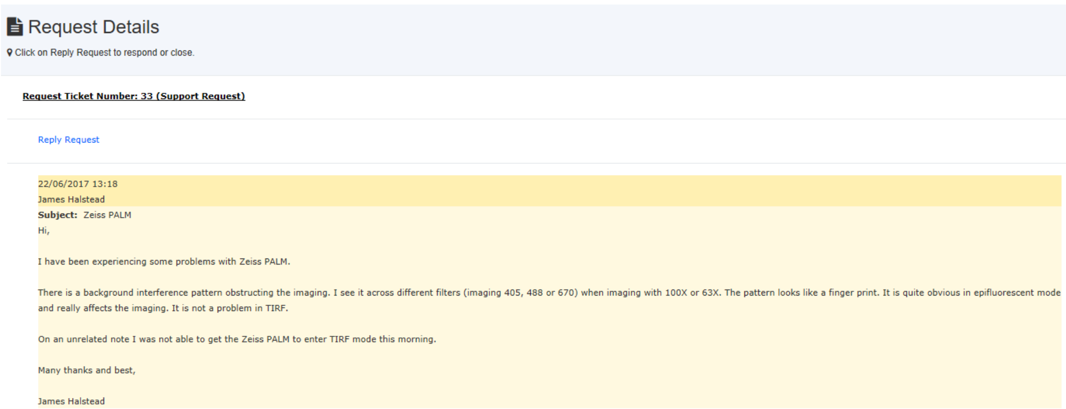
6.33.1 New Request

Users and staff can submit requests containing a subject, message body, and optional pdf attachment. They will need to select a staff member to submit the ticket to.



6.33.2 My Requests

Different colours apply to differentiate the users' requests and staff responses. Yellow refers to users' requests, and blue refers to staff responses that can be navigated through using the available links.



6.33.3 *Open Requests*

This staff-only function allows staff to respond to user requests that are still open.

6.33.4 *Search Requests*

This staff-only function allows staff to search for any requests made by users.

6.33.5 *Set up staff for assistance*

This is an admin feature that is available in ***Utility Manager -> Support Ticket Staff Manager***. Select a staff member and enter a staff role description to add them to the list of staff members that can process tickets.

6.34 Analyse Publications

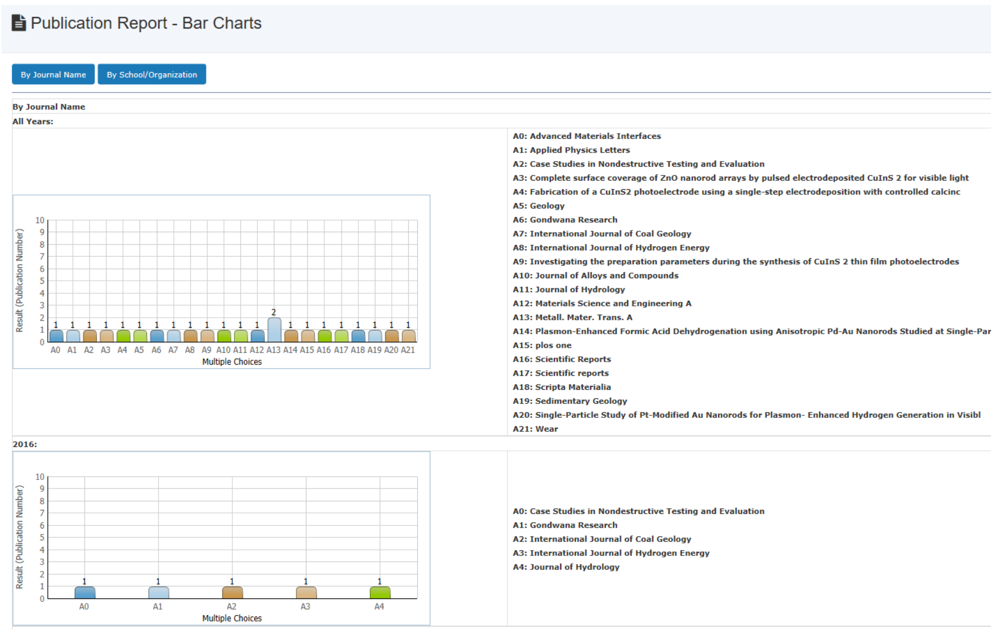
ACLS provides the following ways to run analysis on publications submitted to ACLSs:

- Search publications:

  You can freely search for publications and export results to Excel.

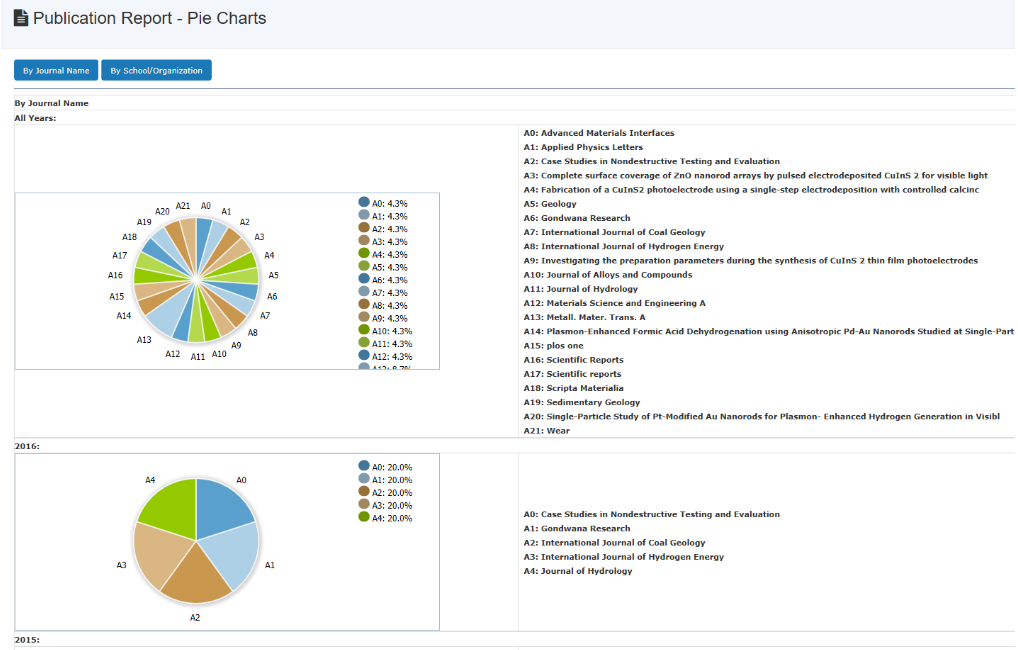
- Bar charts:

  Bar charts highlight key publication statistics, by journal or by school/organization.



- Pie charts:

Pie charts display publication statistics in percentages, by journal or by school/organization.



6.35 Mobile App

The mobile app aims to work as a single gateway to access all ACLS nodes of the research community. The new generation ACLS mobile app is available at the following URL.

iOS: https://apps.apple.com/au/app/ac-lab-system/id1084979585

Android: https://play.google.com/store/apps/details?id=au.com.aclsMobile

6.35.1 Organisation page

The organisation page lists the various organisations you have access to. Tap the organisation will lead you to that organisation's ACLS nodes.

6.35.2 Node list page

After selecting an organisation, you can select any of the nodes you have access to. For example, the node for UNSW'S EMU. This leads to the ACLS sign in page for that node.

6.35.3 Sign in page

After selecting a node, sign in using the email address associated with this node.

6.35.4 One-time code page

Rather than using a password, the mobile app uses a one-time code sign in process.

6.35.5 Landing page upon sign in

After signing in, you will reach the ACLS node landing page. This page lists commonly used features as followings:

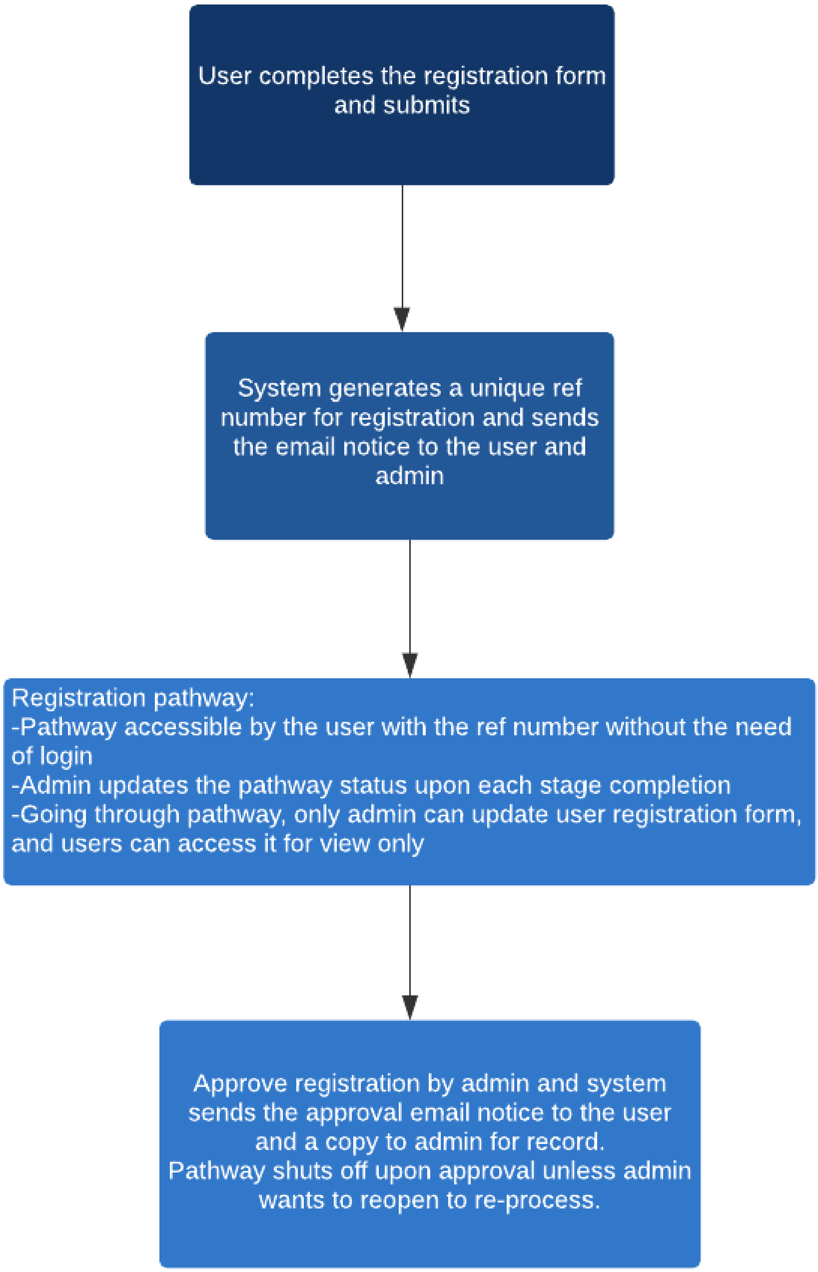
- Resource list
- Consumable list
- My bookings
- Desktop version (staff only)

6.36 Registration Pathway

The default online registration process is a single step process. Users fill in the form and submit. The staff-in-charge either approves or rejects the registration.

However, certain labs wish to run a multiple registration process due to their lab OHS requirements. Hence, the registration pathway is designed to monitor and manage the registration process. Through Pathway, users and staff can zoom in to the process to improve the registration process transparency.

- Flow Chart of User Registration Process:



- Enable pathway:

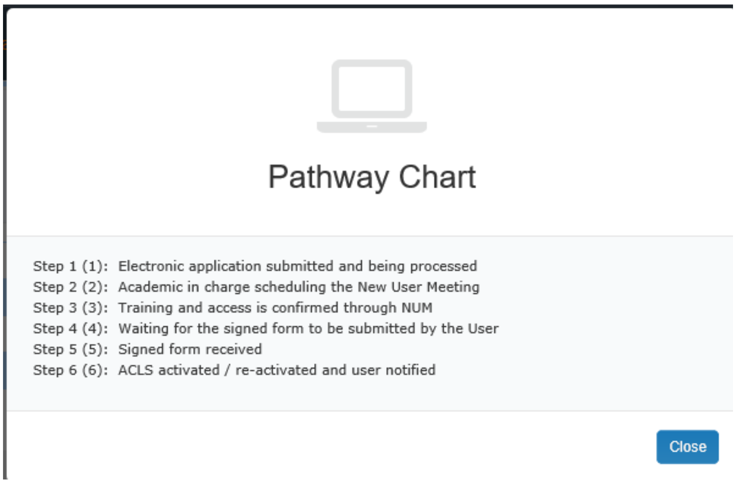
  By default, ACLS disables the pathway. If you wish to run the pathway to manage the registration process, you must enable it first through ***System Settings -> Configure System.***

- Set up pathway:

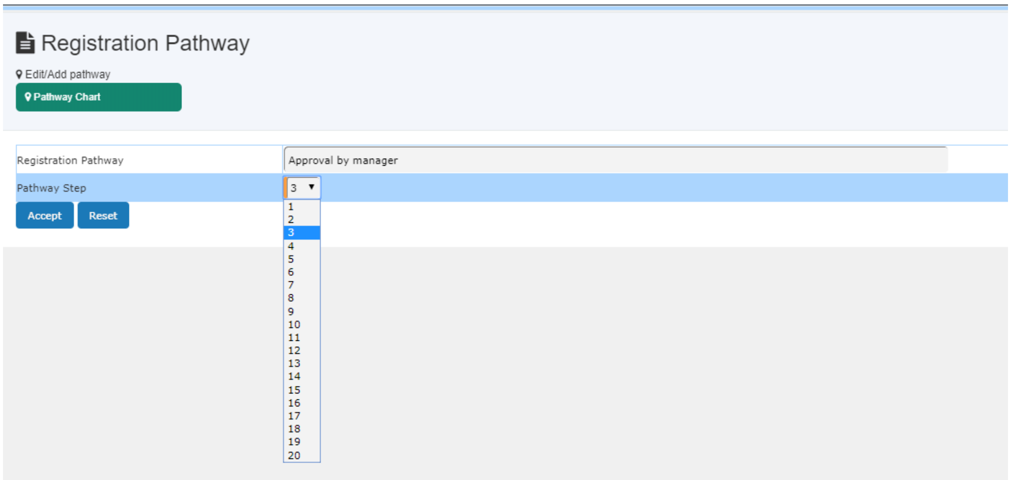
  Registration Pathway is a process of approving a user registration request. By default, the system has the first built-in step **Received registration**. Admin staff can amend and add the registration process steps to suit their labs.

  Go to **System Settings -> Registration Pathway**.

You can define a step number for each pathway step. ACLS shows the step order in the pathway.



- To add a new step:



You can have up to 20 steps in the registration pathway.

- Pathway on Registration Page

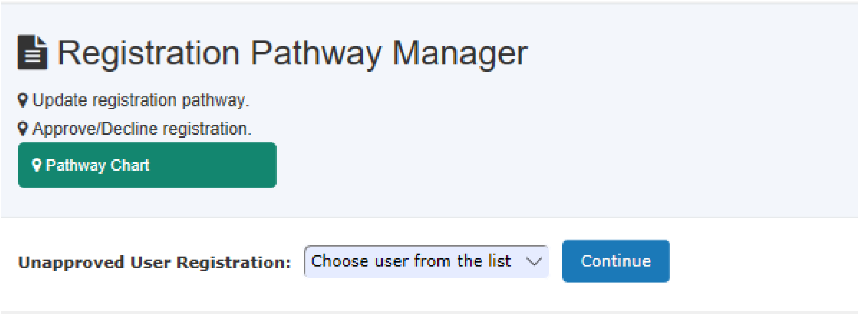
After you set up the pathway, the pathway link is shown on the registration page so that users can check their multiple-steps registration status.

The registration ref number can be used to check the registration pathway status.

A copy of the registration notice is sent to the contact us email defined in ***Configure System***. If you wish to add more staff to receive the new user registration request email, you can go to ***System Settings -> Email Receiver*** to set them up.

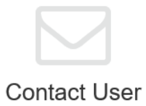
- Approve Registration

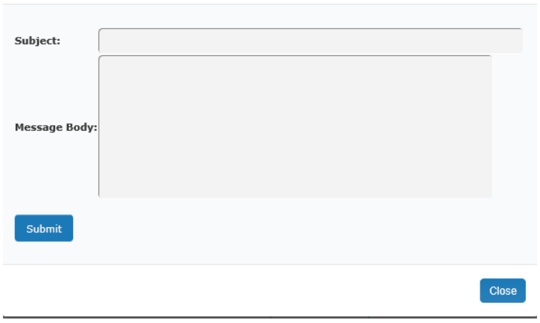
Due to the introduction of Registration Pathway, to approve the user registration, you need to go to ***User Profile -> Registration Pathway Manager*** and select the user to continue.



On the next page, you see the status of each Registration Pathway. You can approve user registrations until the status is closed.

Should you need to contact the user, simply go to Contact User.



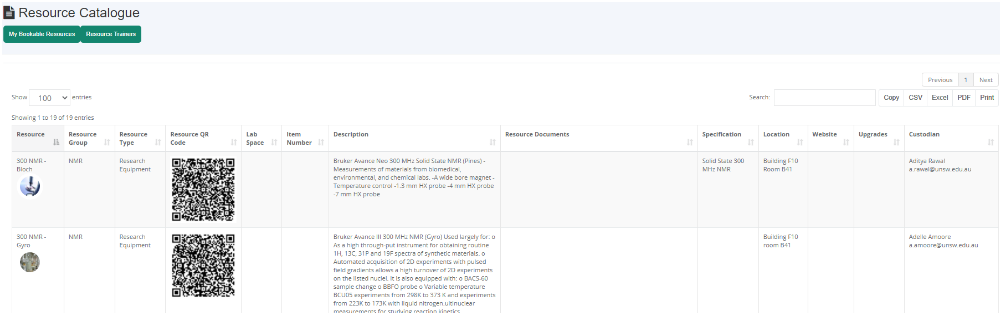


Should you need to access user registration form details, go to “Click to access registration form”. For admin, you can update the form details; for staff, you can view form only.

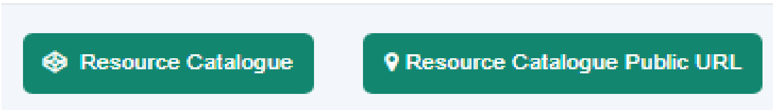
6.37 Resource Catalogue

By default, ACLS catalogues all active resources. Labs can catalogue other items as well, if they wish. Users and staff can directly access resource information and booking information.

The resource catalogue lists all its resources in table form. The default landing page displays the number of total active resources.

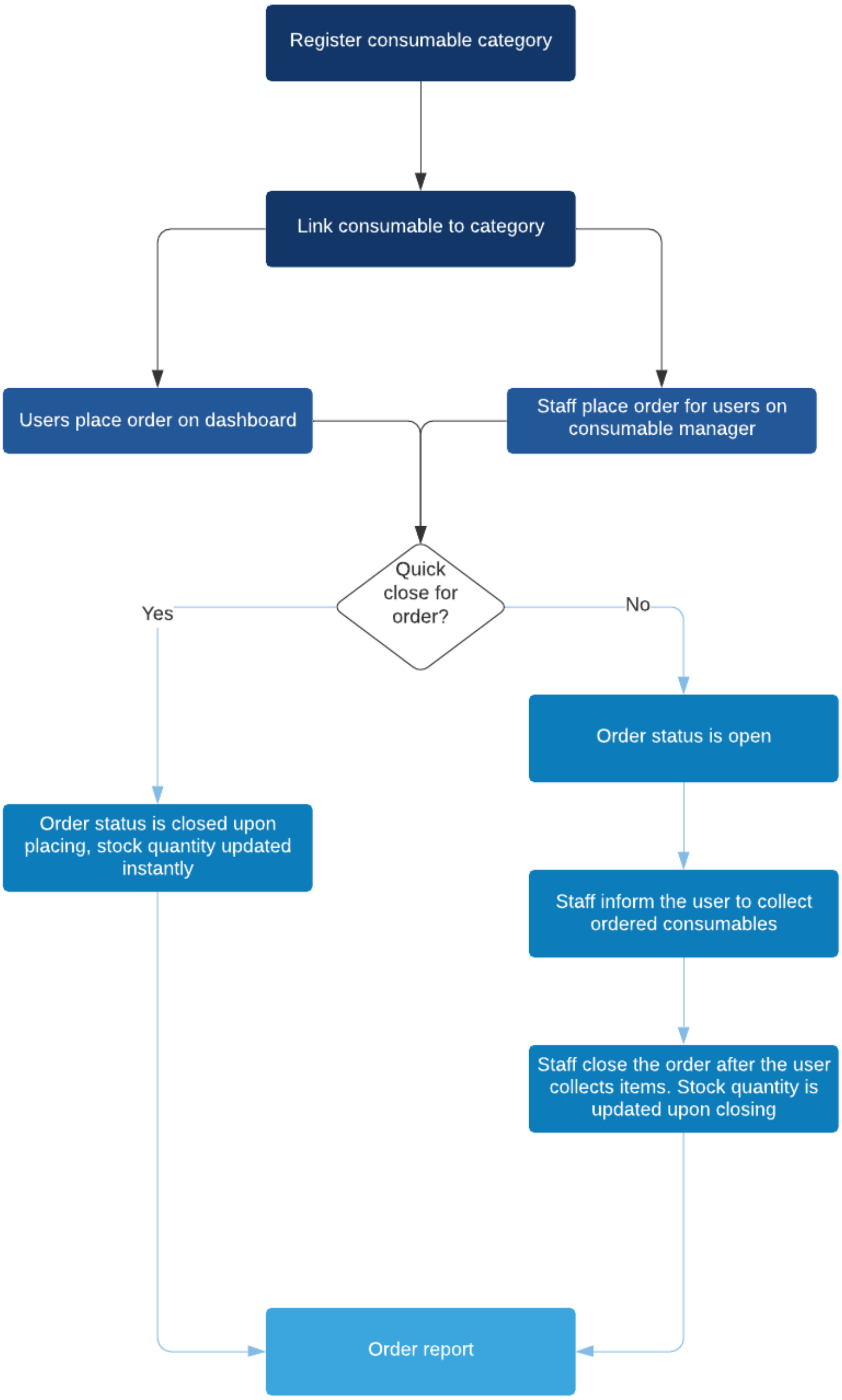


For admins, go to Resource Tab -> Resource Catalogue Public URL to retrieve the publicly accessible catalogue URL.



6.38 Manage and Track Consumables

Labs may provide consumables to users for preparing and running experiments. For example, tools or chemicals. ACLS can manage consumable stock and record consumable orders.



First, a consumable category is registered, and then consumables are added to the category. Users can place an order for a consumable. Typically, the order is marked as open, and the staff waits for the user to collect their order. After collection, the staff member can mark off the order as closed, updating stock quantity. Alternatively, a quick close order allows the order to instantly finalise, bypassing the open/close steps and updating stock levels immediately.

6.38.1 Register consumable categories

To register a new category of consumables, go to the Consumable tab and click on Register Consumable Categories.

6.38.2 Register consumables

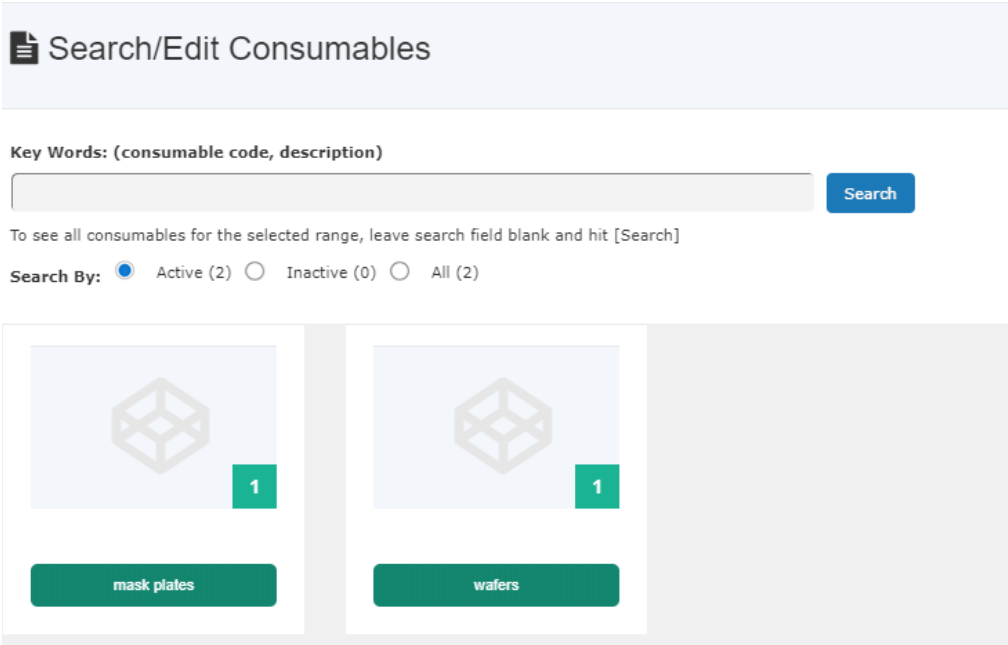
To register a new consumable, go to the Consumable tab and click on Register New Consumables.

Consumable parameters are explained below.

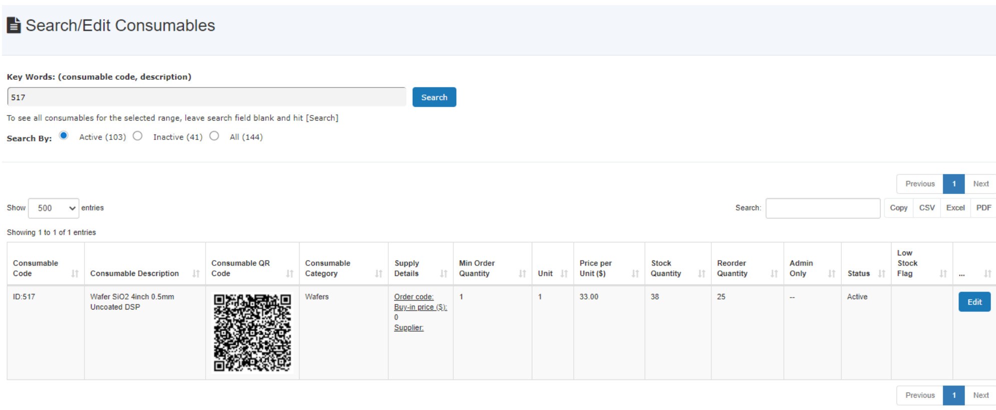
Parameter	Description
Consumable Code	A short code or barcode for the consumable, for example, AT2070
Description	A short description for consumables, for example, ATnLOF2070 100ml.
Consumable Category	The category the consumable should be assigned to. The category is set up in the Register Consumable Categories section.
Unit	Unit type, for example, ml, kg, cm. Multiples of a unit can also be added e.g 100ml as a unit.
Min Order Quantity	A special feature for specific labs. When making a booking, the system will automatically order the specified number of consumables on behalf of the user.
Price per Unit	Price per unit
Stock Quantity	Displays the quantity of the consumable. This field is not editable as it just displays the quantity.
Re-Order Quantity	If the quantity drops below the specified threshold, an email notification is sent out.
Hide Stock Qty on Cart	Tick to hide the stock quantiy on the order cart page
Quick Close on Order	If enabled, the order is immediately closed after placing the order.
Admin Only	If enabled, only admins can order this consumable.

6.38.3 Search/Edit consumables

You can choose to filter by active or inactive consumables, and the results can be sorted. Consumables with low stock will be flagged for attention.



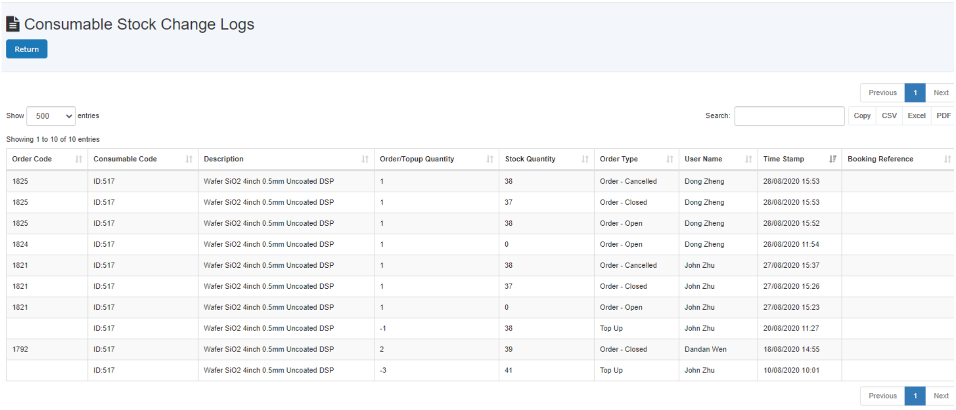
You can access the edit page for the consumable profile directly through the search results.



When editing a consumable profile, you may upload an image of the consumable.
The recommended image size is 200px by 200px.

The system records any price changes. They can be seen through the Price Change Logs button.

Stock quantity change is also logged for accountability and record keeping purposes.



Consumable Stock Change Logs

Return

Previous 1 Next

Show 500 entries

Search:

Copy CSV Excel PDF

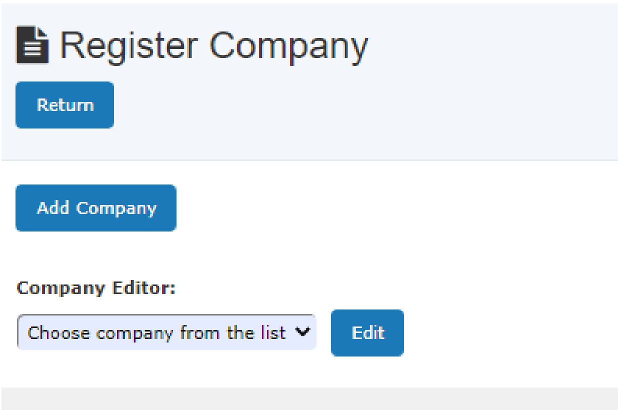
Showing 1 to 10 of 10 entries

Order Code	Consumable Code	Description	Order/Topup Quantity	Stock Quantity	Order Type	User Name	Time Stamp	Booking Reference
1825	ID:517	Wafer SiO2 4inch 0.5mm Uncoated DSP	1	38	Order - Cancelled	Dong Zheng	28/08/2020 15:53	
1825	ID:517	Wafer SiO2 4inch 0.5mm Uncoated DSP	1	37	Order - Closed	Dong Zheng	28/08/2020 15:53	
1825	ID:517	Wafer SiO2 4inch 0.5mm Uncoated DSP	1	38	Order - Open	Dong Zheng	28/08/2020 15:52	
1824	ID:517	Wafer SiO2 4inch 0.5mm Uncoated DSP	1	0	Order - Open	Dong Zheng	28/08/2020 11:54	
1821	ID:517	Wafer SiO2 4inch 0.5mm Uncoated DSP	1	38	Order - Cancelled	John Zhu	27/08/2020 15:37	
1821	ID:517	Wafer SiO2 4inch 0.5mm Uncoated DSP	1	37	Order - Closed	John Zhu	27/08/2020 15:26	
1821	ID:517	Wafer SiO2 4inch 0.5mm Uncoated DSP	1	0	Order - Open	John Zhu	27/08/2020 15:23	
	ID:517	Wafer SiO2 4inch 0.5mm Uncoated DSP	-1	38	Top Up	John Zhu	20/08/2020 11:27	
1792	ID:517	Wafer SiO2 4inch 0.5mm Uncoated DSP	2	39	Order - Closed	Dandan Wen	18/08/2020 14:55	
	ID:517	Wafer SiO2 4inch 0.5mm Uncoated DSP	-3	41	Top Up	John Zhu	10/08/2020 10:01	

Previous 1 Next

6.38.4 *Set up consumable supplier*

The Edit Supplier button is available on the Edit Consumable page. Consumable suppliers can be set up for record keeping purposes.

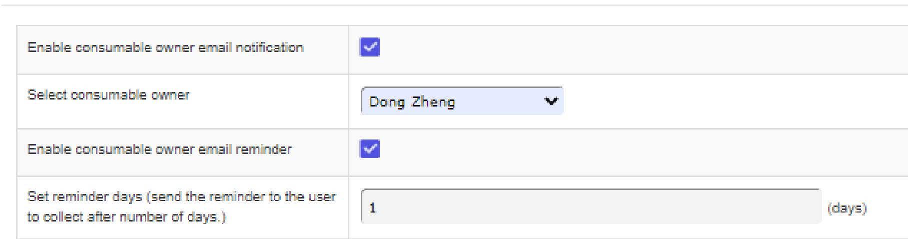


6.38.5 *Notify user to collect the ordered consumables*

Admin and staff can choose to notify the user to collect their ordered items at any time. The page shows if a notification has been sent or not.

6.38.6 *Set up consumable owners and alerts*

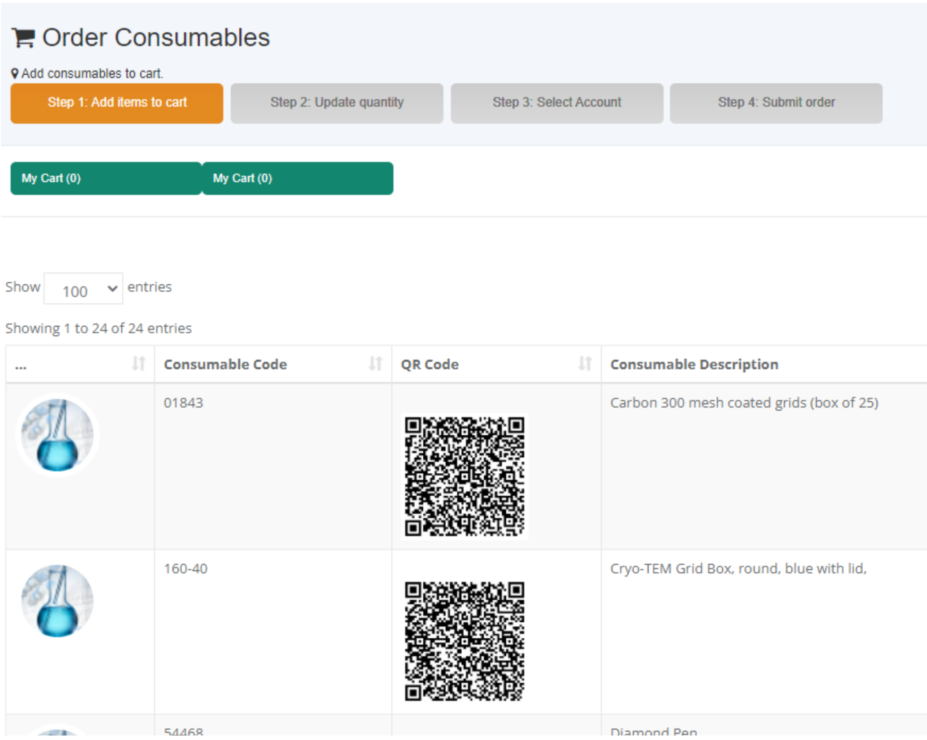
Go to the Search/Edit Consumable page and click Set Up Consumable Category Owner, Notification and Reminder



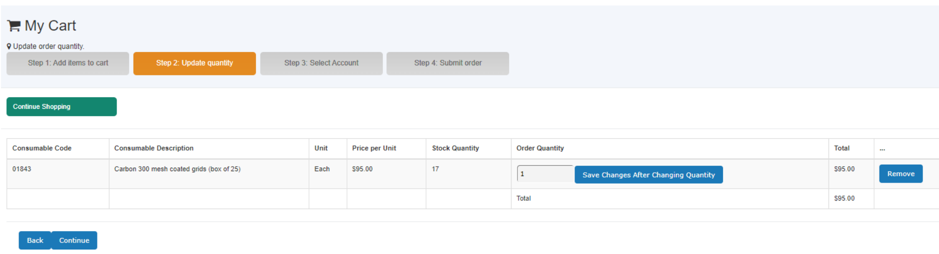
After enabling the notification and reminder, ACLS will send out a consumable order notice to the owner when a user places an order. Notifications are sent out once per day.

6.38.7 Order consumables

Ordering consumables is similar to that of an online storefront. Users can locate the consumables they need with categories and the search tool.

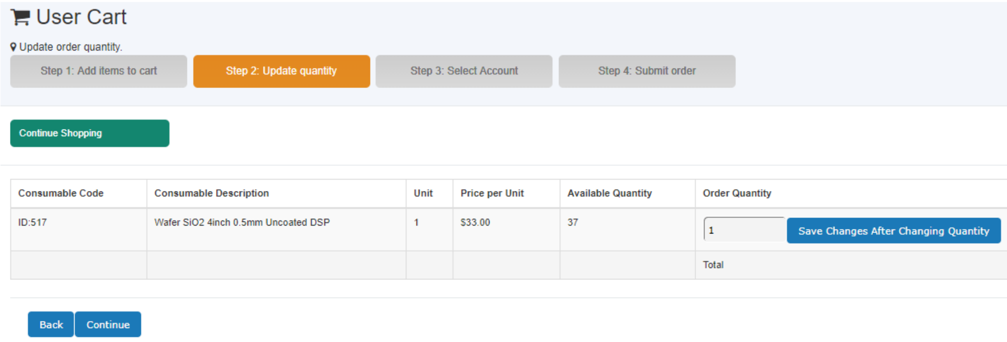


Users can check their previous order records via ***My Order***, and check their current cart via ***My Cart.***

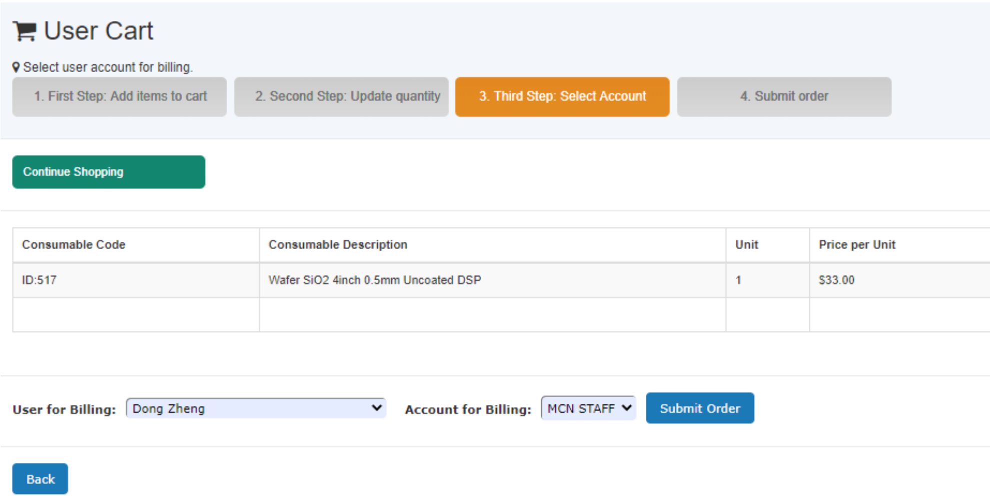


6.38.8 Lab admin to order consumables for users:

Lab admins can order consumables for other users if needed. Lab admins also can check any users' order via ***User Orders***. To order a consumable for a different user, select Order Consumables for User.



Select the user and an account and submit the order.

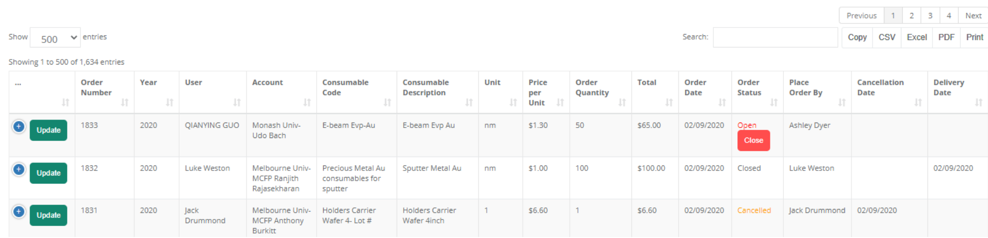


For each order, after the order is placed, an email will be sent to the user with the following requests:

- Please ask one of the staff members in the cleanroom for the delivery.
- Or ask one of the staff members in the office for the delivery.

6.38.9 Update consumable orders

Lab admins can modify the details of an existing order. Go to ***Staff -> Consumable Resources -> Change Consumable Orders***.



Click on Update to edit the order’s details. For example, you can edit the quantity of the order.

Update Order

Order No:	1833
Consumable Code:	E-beam Evp-Au
Consumable Description:	E-beam Evp Au
User:	QIANYING GUO
Account:	Monash Univ-Udo Bach
Unit	nm
Unit price ($):	1.30
Order quantity:	50
Available quantity:	6394
Stock quantity:	6694
Delivery Status:	(tick to close delivery)

6.38.10 Delivery status of consumable orders

Labs are generally required to record the delivery status of each consumable order. Go to ***Staff -> Consumable Resources -> Change Consumable Order.*** The system shows a delivery status of ***Open*** or ***Closed***.

For closed orders, you can see the record date and the staff member who closed the delivery.

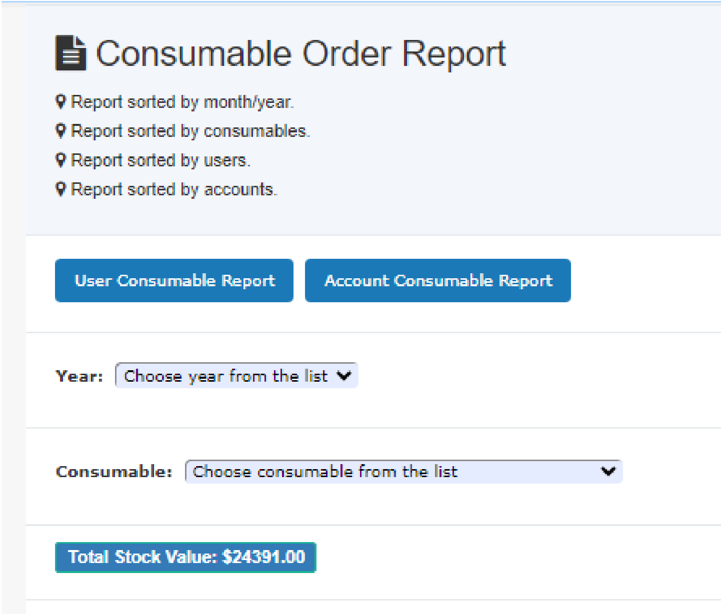
For open orders, you can confirm and record the delivery by ticking the checkbox for the delivery status.

6.38.11 Cancel order

If an order is cancelled, the system automatically rolls back the stock level. Admin can restore the cancelled order at any time.

6.38.12 Consumable order report

Lab admins can access a report detailing all consumable orders. You can sort by users or accounts, and filter by year or specific consumable. The report provides consumable details such as stock quantity.



6.38.13 Consumable stock check

The system sends out a daily email to lab admins listing the consumable stock quantity. This is useful for keeping a close eye on stock quantities.

6.38.14 Integrate the consumable orders in the monthly invoice

Delivered consumable orders are consolidated into a monthly invoice. To enable this feature, the system admin needs to enable the global setting parameter ***Include Consumable To Usage Invoice.***

6.38.15 Consumable order auto-collection reminder

Subject to the system settings, the system sends out an auto-reminder for order collection after xx days upon the order is placed.

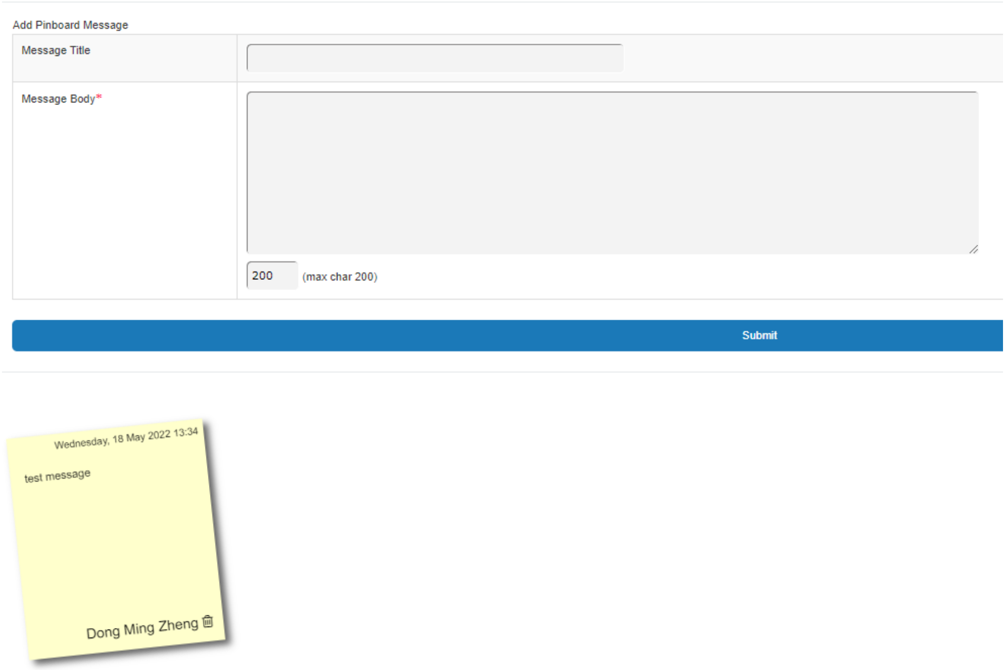
6.38.16 Consumable order auto-cancellation

Subject to the system settings, the system cancels the open order after xx days upon the order is placed to minimise the number of the uncollected and open orders

6.39 Staff Comments on Users

Staff may want to leave comments on some users regarding performance, behaviour. You can go to the user and select ***Profile -> Pinboard*** to add your sticky notes

The sticky notes on the user profile are accessible by any staff member on the individual user profile. They are not shown on the public pinboard, and standard users cannot see these comments either. Only lab admins can delete staff comments.

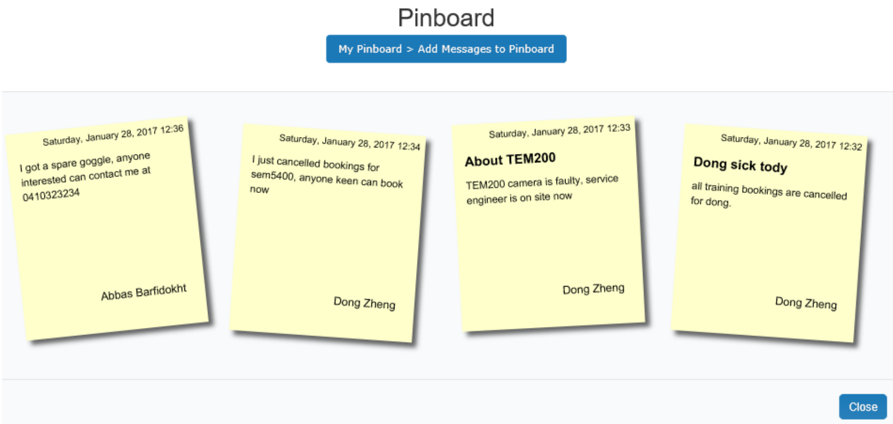


6.40 My Pinboard

My pinboard emulates a message wall or cupboard in a lab room where users can leave sticky notes for anything. There are two types of sticky note.

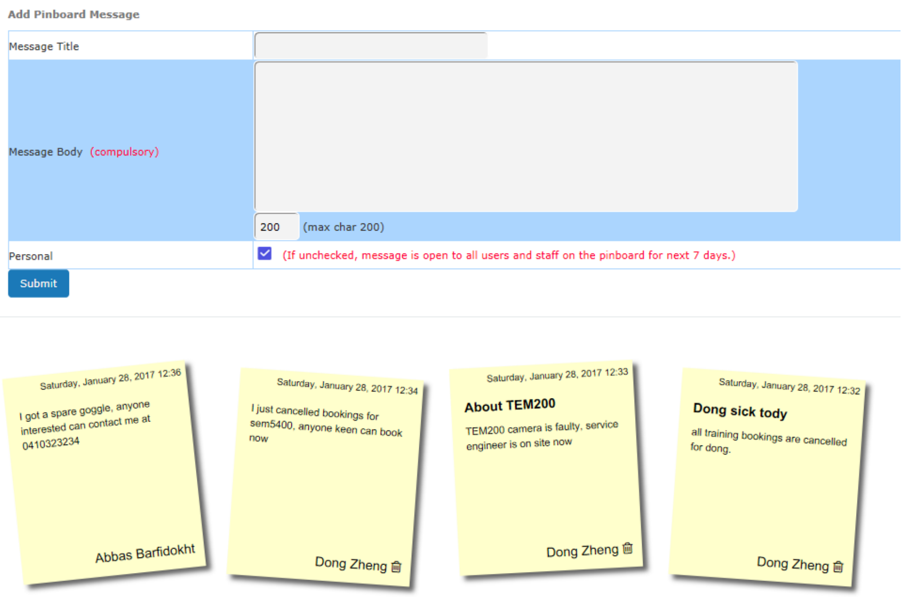
- Personal: only accessible by the user who made it.
- Public: can be viewed by any registered user or staff. Public sticky notes will be deleted automatically in 7 days or can be deleted by lab admin staff.

On the header, the speech bubble icon indicates if there are any sticky notes left on the pinboard. Clicking the speech bubble icon will display your own sticky notes and any public sticky notes.



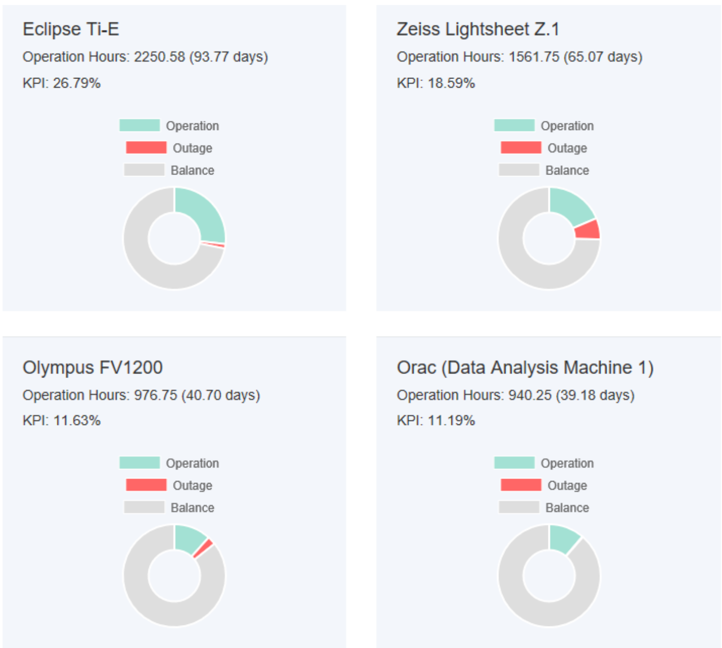
Go to ***My Pinboard*** to manage your sticky notes. The rubbish bin icon can be used to delete unwanted notes.

Lab admin can delete any public sticky notes on their pin board.



6.41 Most Popular Resources

Corea Analytics provides resource booking analytics, such as the most booked resources and their trends over time.



6.42 Resources With the Most Training Hours

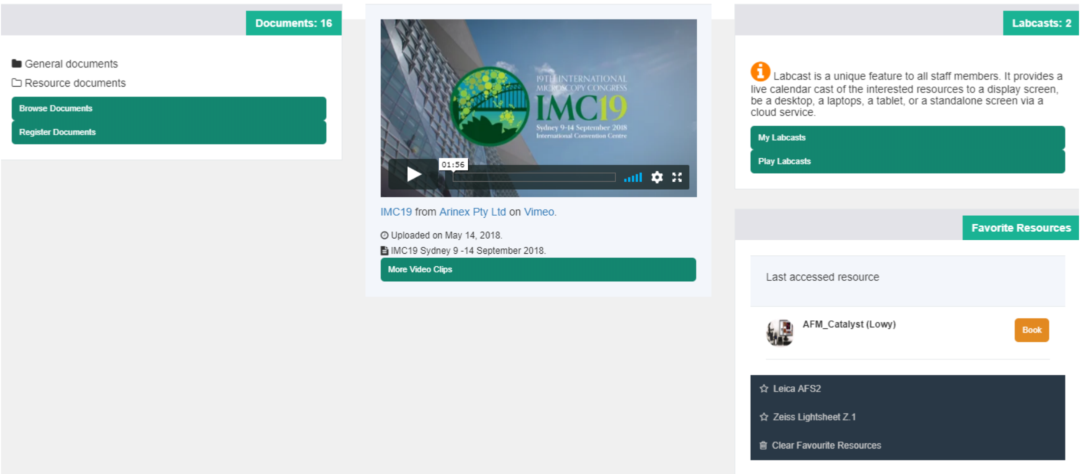
Corea Analytics provides training booking analytics, such as the resource with the most hours spent on training.

6.43 Resources With The Most Outage Hours

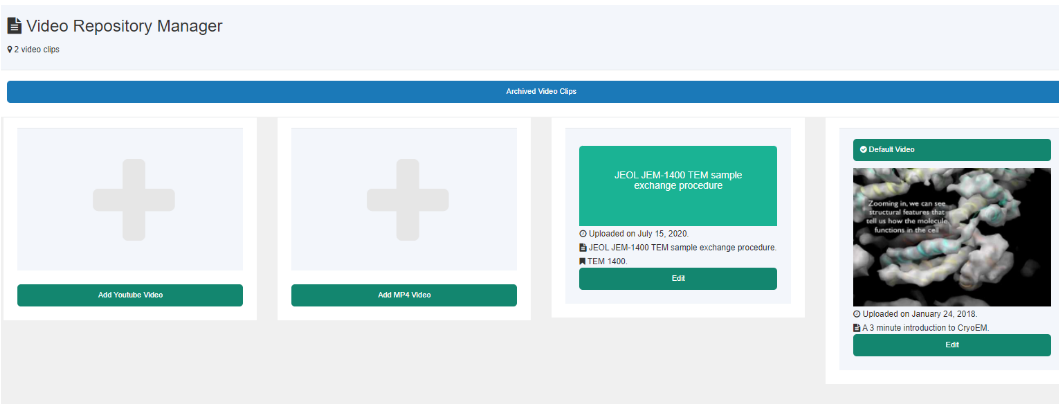
Corea Analytics provides resource outage analytics, such as the resource with the most outage hours.

6.44 Video Player

This feature helps to promote training courses, organization events. The user can click on the More Video Clips button to visit the main video clip page. If you have set up at least one video clip, it will be displayed on the sign in landing page.

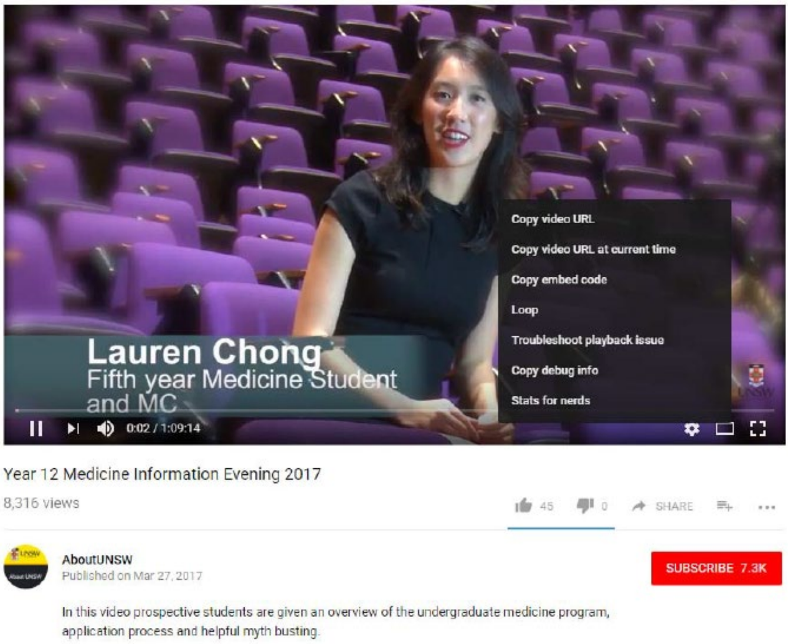


Admin staff can access Video Repository Manager to add or change video clips. Video clips can be an online video like YouTube, or a direct mp4 upload.

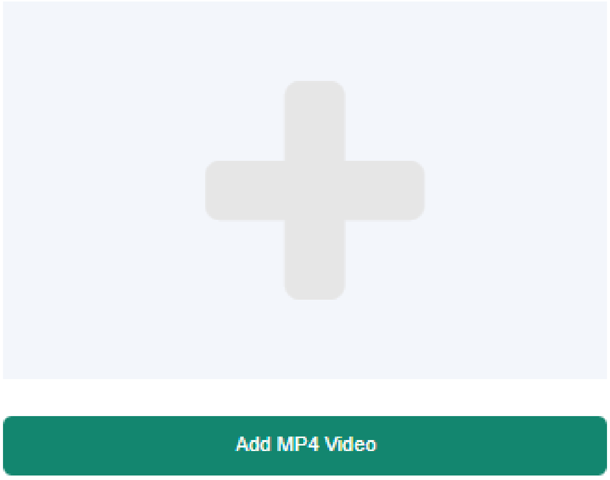


The displayed videos are randomly chosen on each login.

6.44.1 Add Youtube Videos

Parameter	Description
Title	The video clip title, which can be copied from Youtube
Description	The video description, which can be copied from Youtube
Video type	Select a category for the video (e.g general, educational, safety, etc). A sorting feature will be implemented in the future.
Video source	You can select YouTube or a different video platform. If using Youtube, the thumbnail is automatically set. Otherwise, you will need to upload your own thumbnail.
Embed URL	Do not put the video URL here, as that will not work. Youtube or any other video hosting site will provide an embed code that allows the video to be displayed elsewhere. Copy that code here. For example, on Youtube, right click the video and select Copy Embed Code. 
Resource	You can register the clip to a resource. In the future, the system will sort clips according to resource.
Set as default	The default clip is the clip that is shown on the landing page.
Status	If ticked, the clip is enabled and viewable. If unticked, it won't be displayed in the video page.

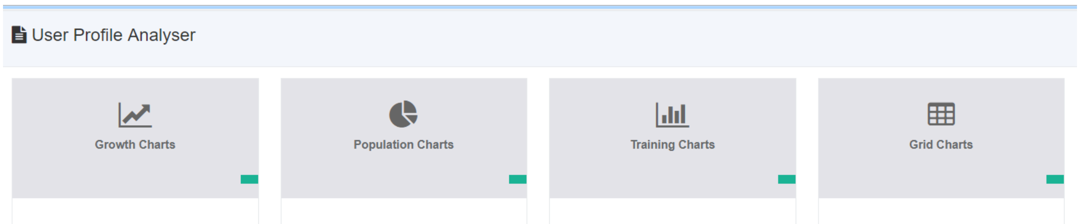
6.44.2 *Add MP4 videos*



Parameter	Description
Title	The video clip title
Upload MP4	An upload box for uploading the video file to ACLS
Resource Group	You can register the clip to a resource. In the future, the system will sort clips according to resource.
Video type	Select a category for the video (e.g general, educational, safety, etc). A sorting feature will be implemented in the future.
Set as default	The default clip is the clip that is shown on the landing page.
Status	If ticked, the clip is enabled and viewable. If unticked, it won't be displayed in the video page.

6.45 User Profile Analyser

ACLS is equipped with graphical analytical tools such as userbase growth over time.

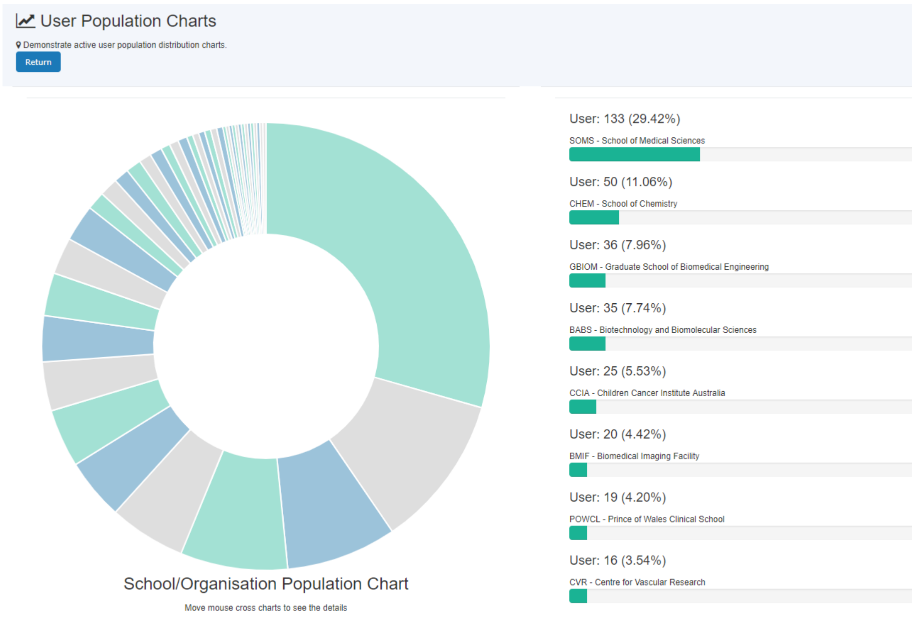


6.45.1 *Growth charts*

Growth charts demonstrate user growth over the selected period. This information may be useful for foreseeing future growth potential and anticipating future research demands.

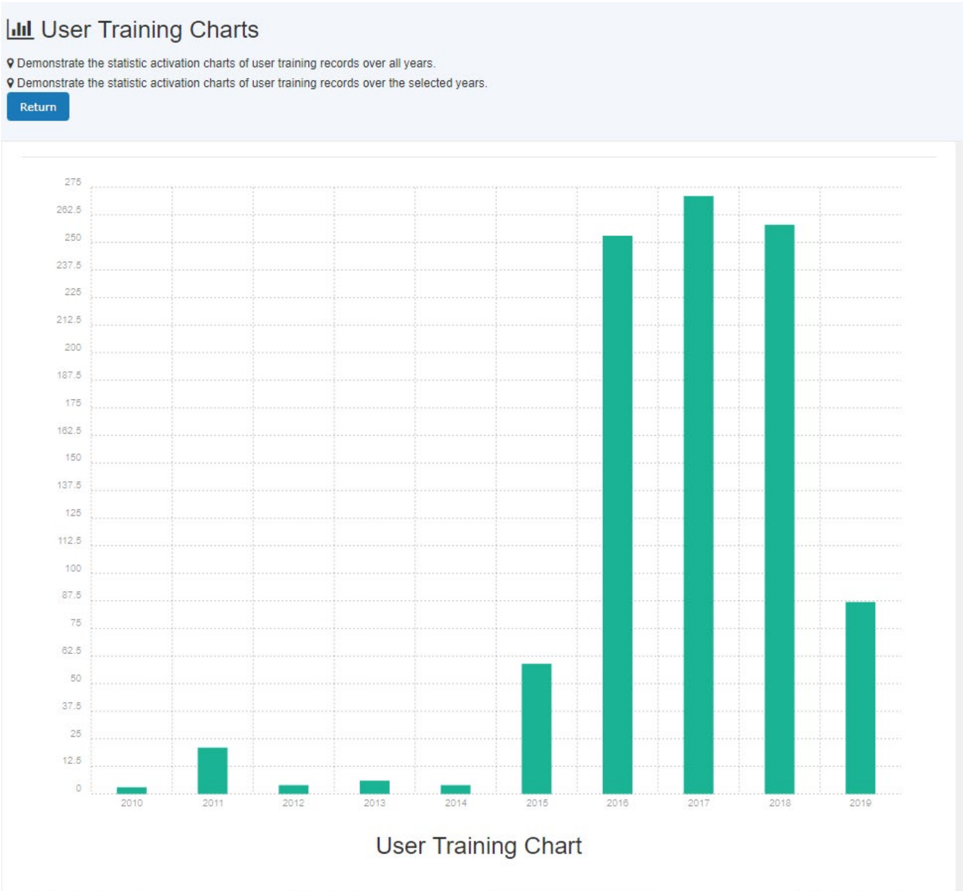
6.45.2 Population charts

Population and geographic charts indicate distribution of the userbase. These charts can help labs figure out how to meet the research needs of the largest research groups.



6.45.3 Training charts

Training charts show the number of training records over the selected period. This information may be useful for anticipating future demand for training.

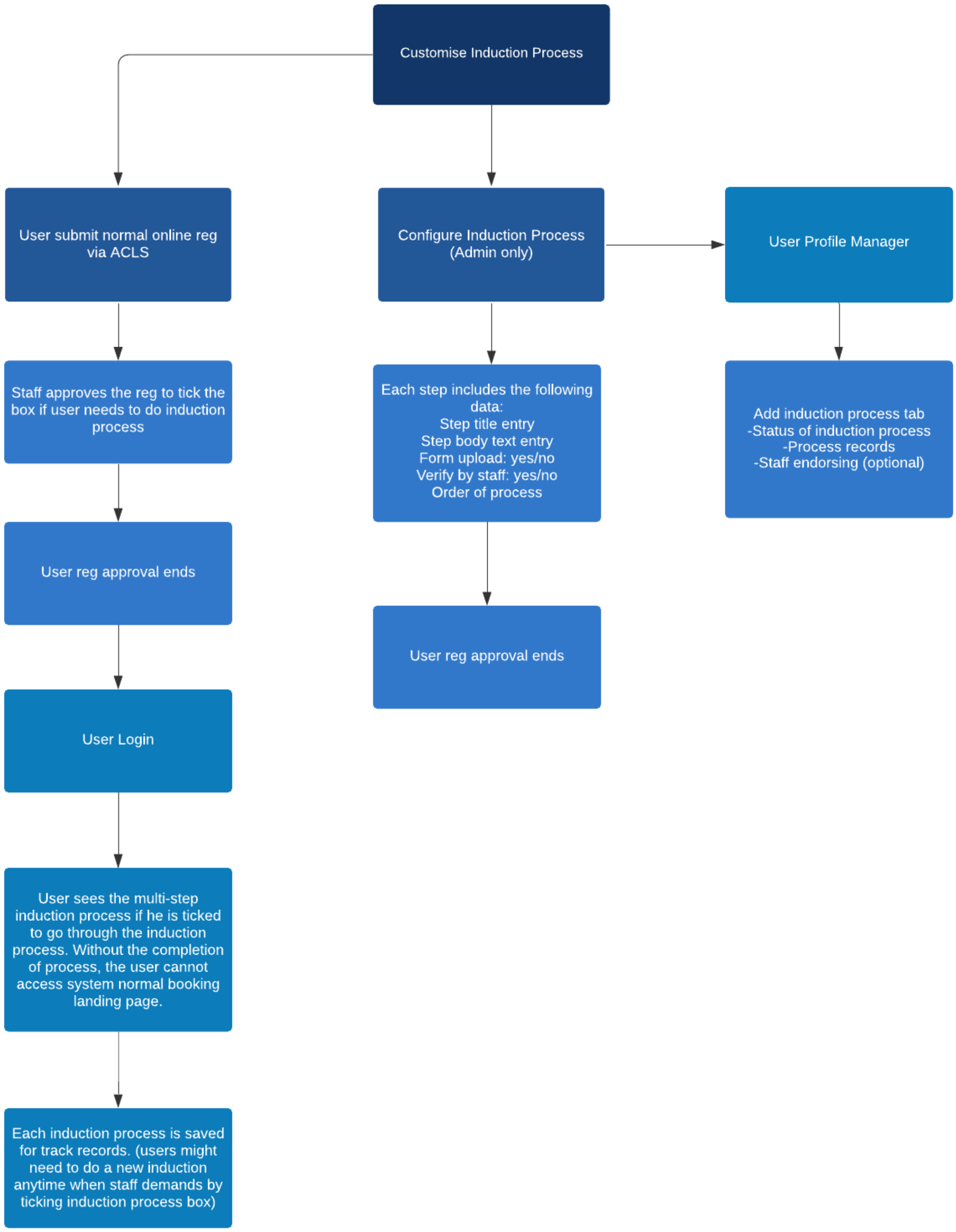


6.46 Induction Process

Induction processes are included for labs that require specific procedures, such as medical labs and PC2 labs. For this process, users will have to complete extra processing forms that will need to be verified by the staff in charge.

There is also a collaboration protocol that can be established so that induction results are shared across different labs, so that the user does not need to repeat the same induction.

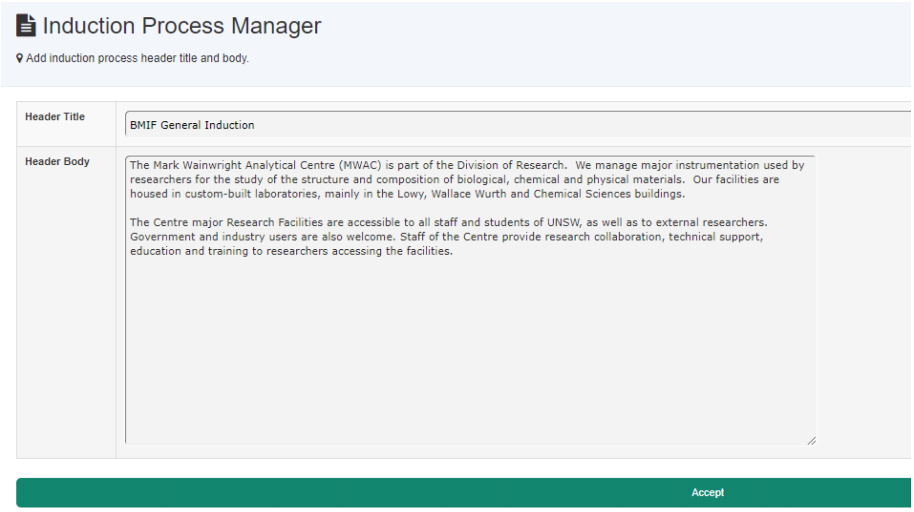
From the user’s perspective, the user completes registration as normal. Then, when they log in, they must complete the induction procedure before they can access the booking page.



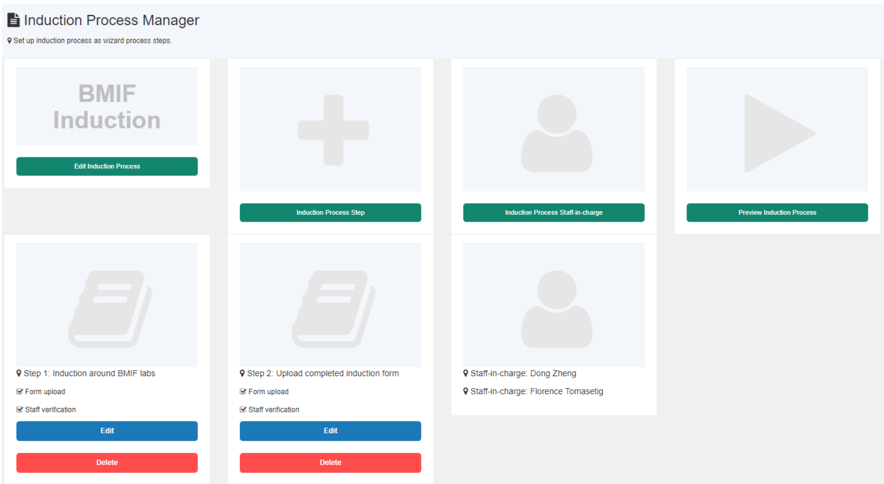
6.46.1 Set Up Induction Process

You can set up multiple induction processes according to your lab operational requirements.

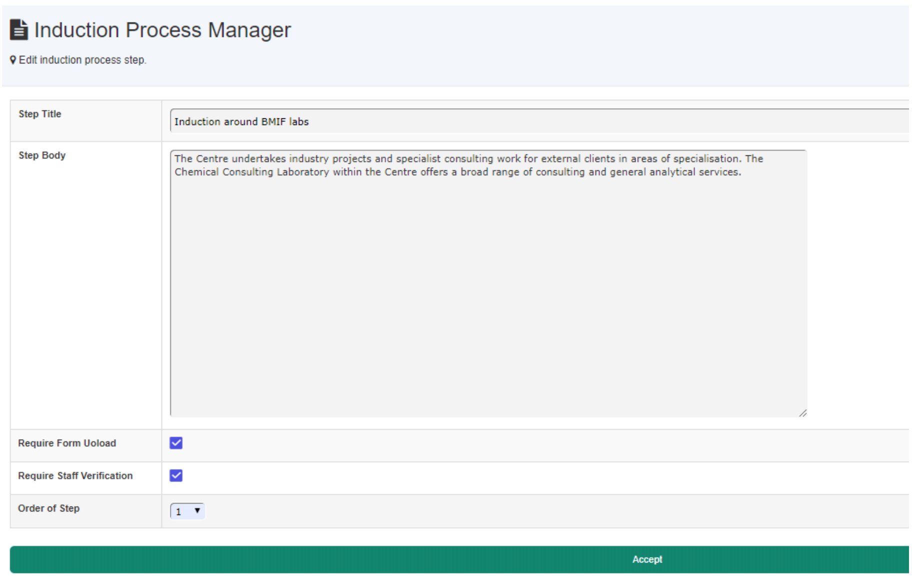
Go to ***Staff -> Utility -> Induction Process Manager***. Initial setup involves adding a header (the title) and body (the description).



After creating an induction process, you will need to describe each individual steps



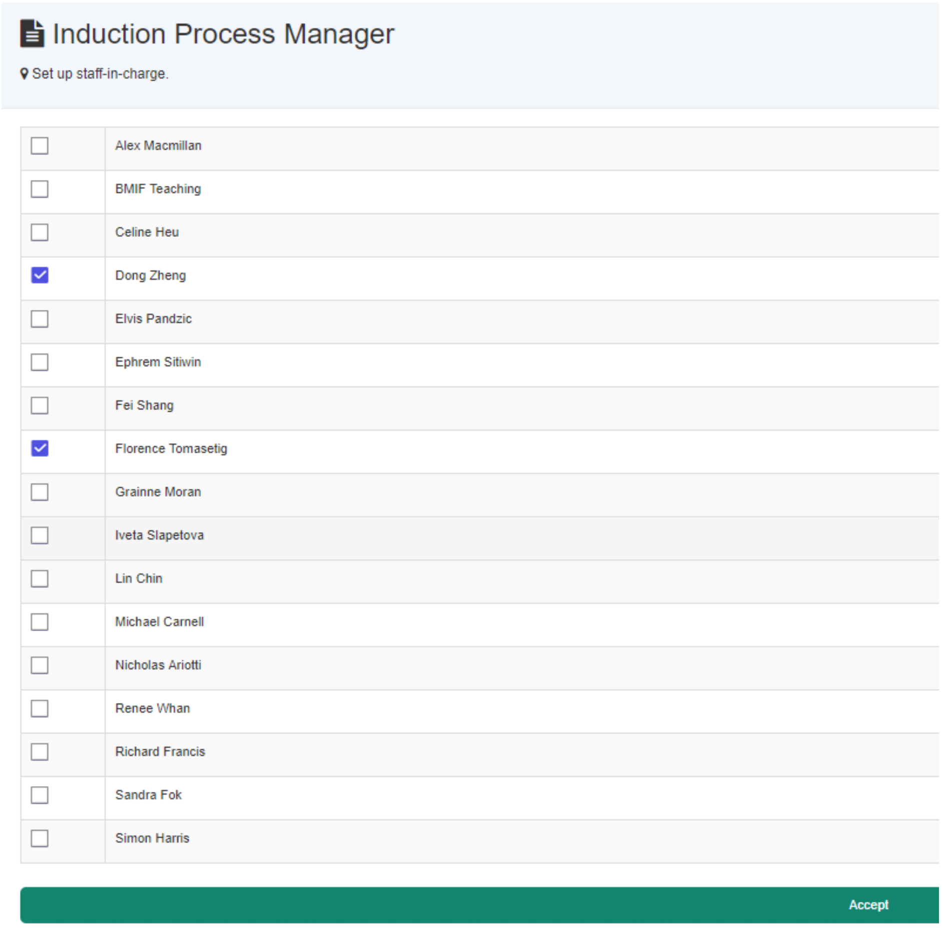
- Set up each step of the process



You will need to describe the induction step. You can indicate if the step requires a form to be uploaded, and whether a staff member needs to verify its completion. You will need to select the number position this step will be for the user.

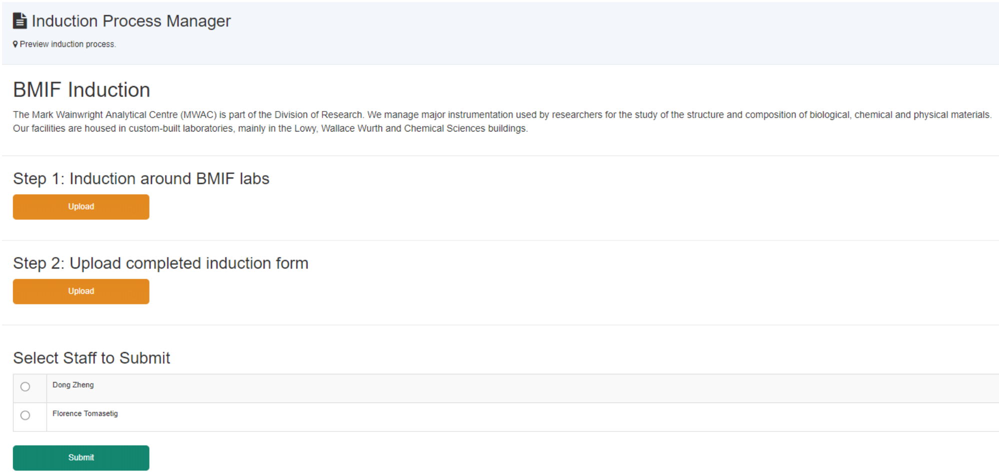
- Add staff-in-charge to the process

When the user submits their induction completion, ACLS sends an email notification to the user and the nominated staff in charge. You can select the staff in charge from the list of checkboxes in the induction process manager.



- Preview induction process

After setting it up, you can preview the induction process.



6.46.2 *Enable Induction Process to Users*

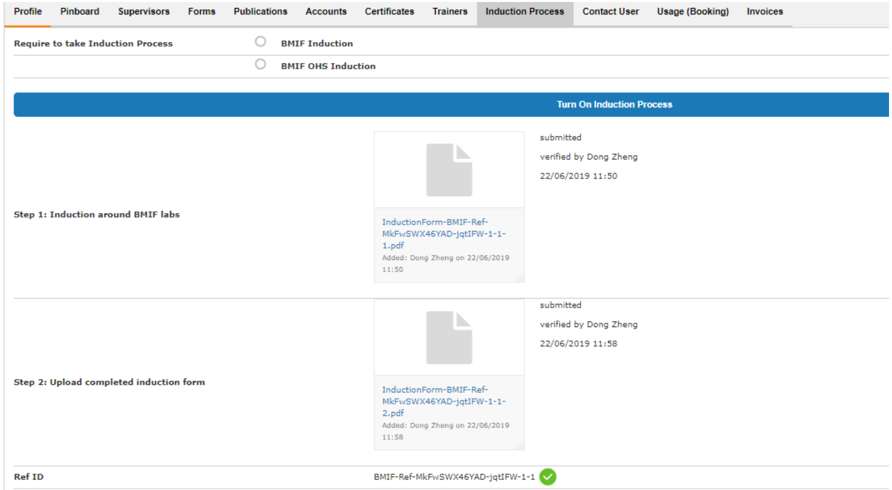
There are two ways to enforce completion of the induction process.

- For new users

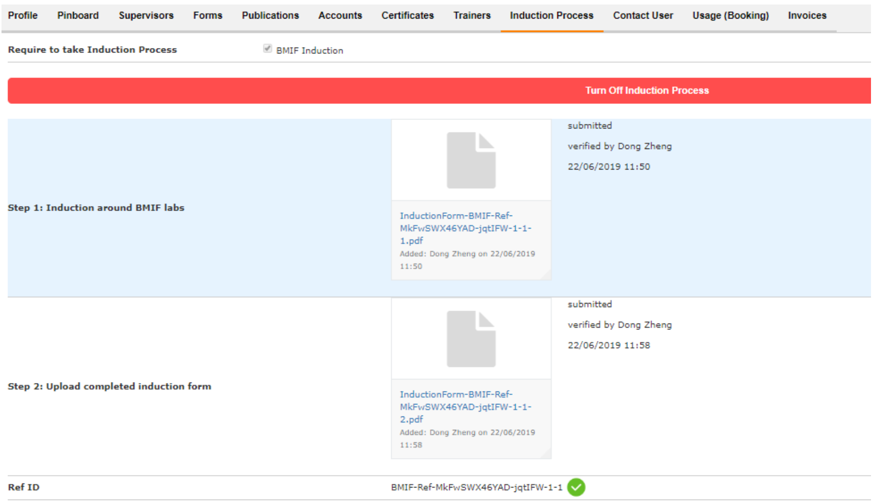
  When processing a new online registration in the User Profile Manager’s Process Online Registration section, you can select or deselect the required induction processes from the list of all induction processes.

- For registered users

  Go to the User Profile Manager, select a user, then go to the Induction Process tab. Select or deselect the required induction processes from the list of all induction processes.



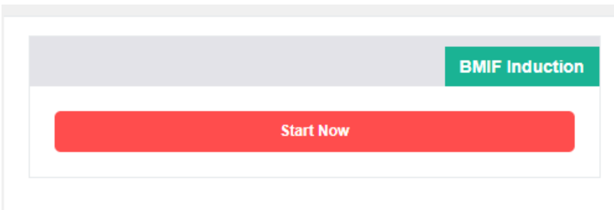
You can turn on Induction Process or turn off Induction Process to enable/disable the entire induction process for this user.



Each induction process record is displayed in their user profile for future reference.

- Completing induction as a user

After setting an induction procedure for a user, the user must complete the induction on their booking tab page.



Click on Start Now to enter the induction process, ACLS automatically generates a reference ID.

The user will have to submit completion of each individual step. The user chooses which staff member to submit the notification of induction completion.

The induction process only completes after a staff member verifies the induction completion. On the staff end, the user profile shows the full detail of each induction step.

6.47 Resource/Consumable QR Codes

6.47.1 QR Code Overview

QR code implementation for resource bookings and consumable usages allows users:

- To quickly book and access equipment
- To order consumables
- To record consumable usage
- To access lab information

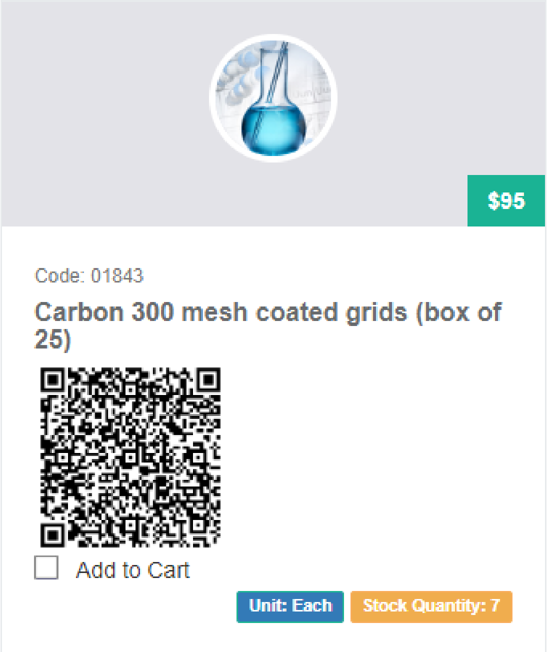
6.47.2 Resource QR Codes

A resource can have an associated QR code assigned to it. These QR codes show up on the catalogue and calendar pages. You can save these QR codes wherever you want to access them at any time. For example, you can bookmark them on your phone, print them out to be displayed, or display them on a touch screen.

Scanning the QR code with your smartphone camera will take you to the page of the selected resource. From here, you can view all details like bookings, trainers, etc. You will be able to make a booking directly from this page.

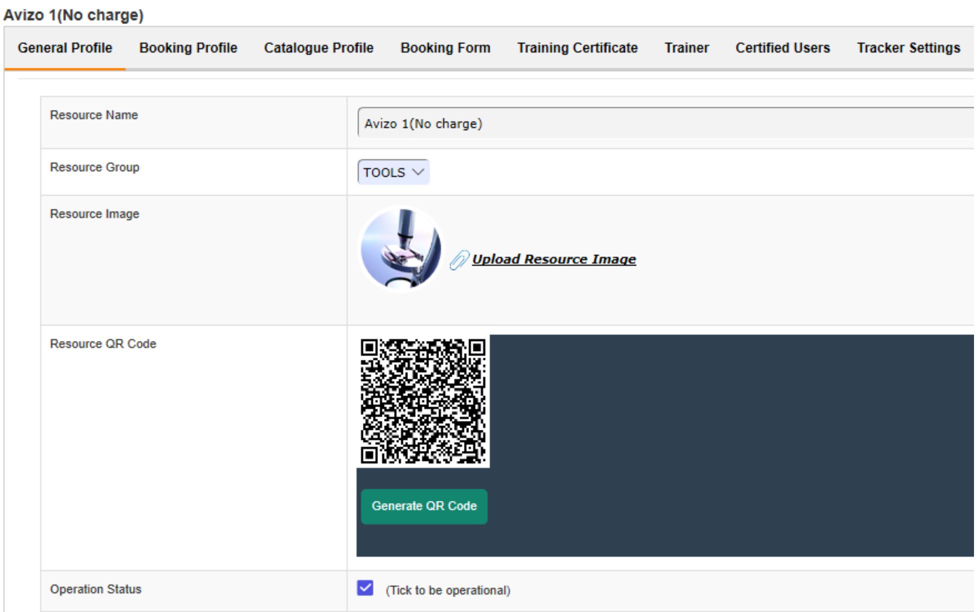
6.47.3 Consumable QR Codes

QR codes are effective for consumable ordering, recording and tracking. Scanning the QR code will take you to the information page for the consumable.

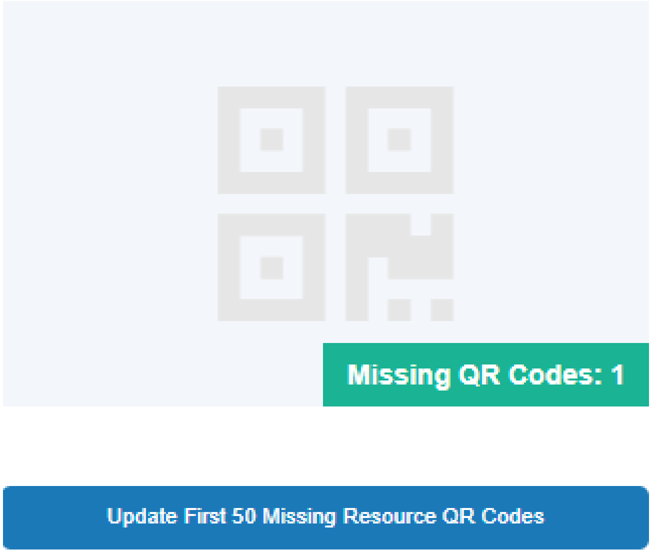


6.47.4 *Generating Resource QR Codes*

After you add a new resource, go to the resource in the Resource Manager to generate a QR code.

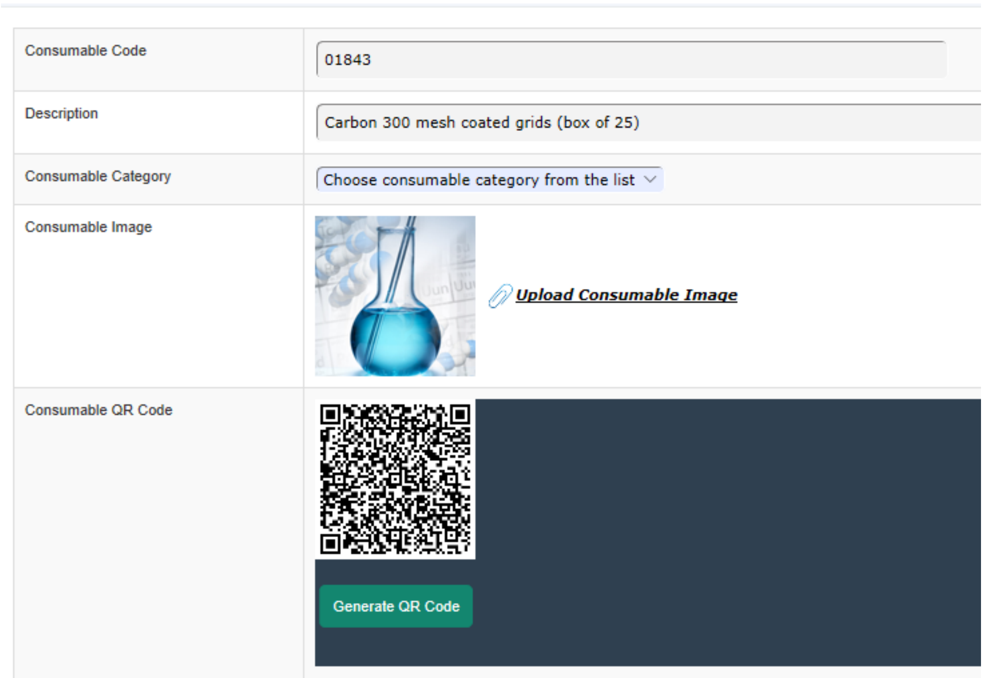


To batch generate up to 50 resource QR codes at once, go to the ***Resource Manager***.



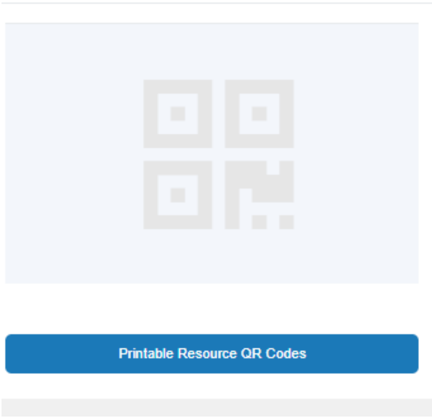
6.47.5 Generating Consumable QR Codes

Generating QR codes for consumables is done in the same way. You can individually generate a QR code for a consumable by going to its edit page in the Edit Consumables page in the Consumables tab. Alternatively, you can batch generate up to 50 consumable QR codes on the Edit Consumables page.



6.47.6 Printable resource QR code list

A printable QR code list is available so that lab staff can easily hang up QR booking codes in the lab. On Resource Manager page, you can print all resource QR codes on a single page or export them to a document via print to PDF.



6.47.7 *Printable consumable QR code list*

Like the printable resource QR code list, a printable consumable QR code list is available so that lab staff can easily hang up QR codes in the lab. On the Edit Consumable page, you can print all consumable QR codes on a single page or export them to a document via print to PDF.

6.48 Social Distancing at Lab Space (COVID-19)

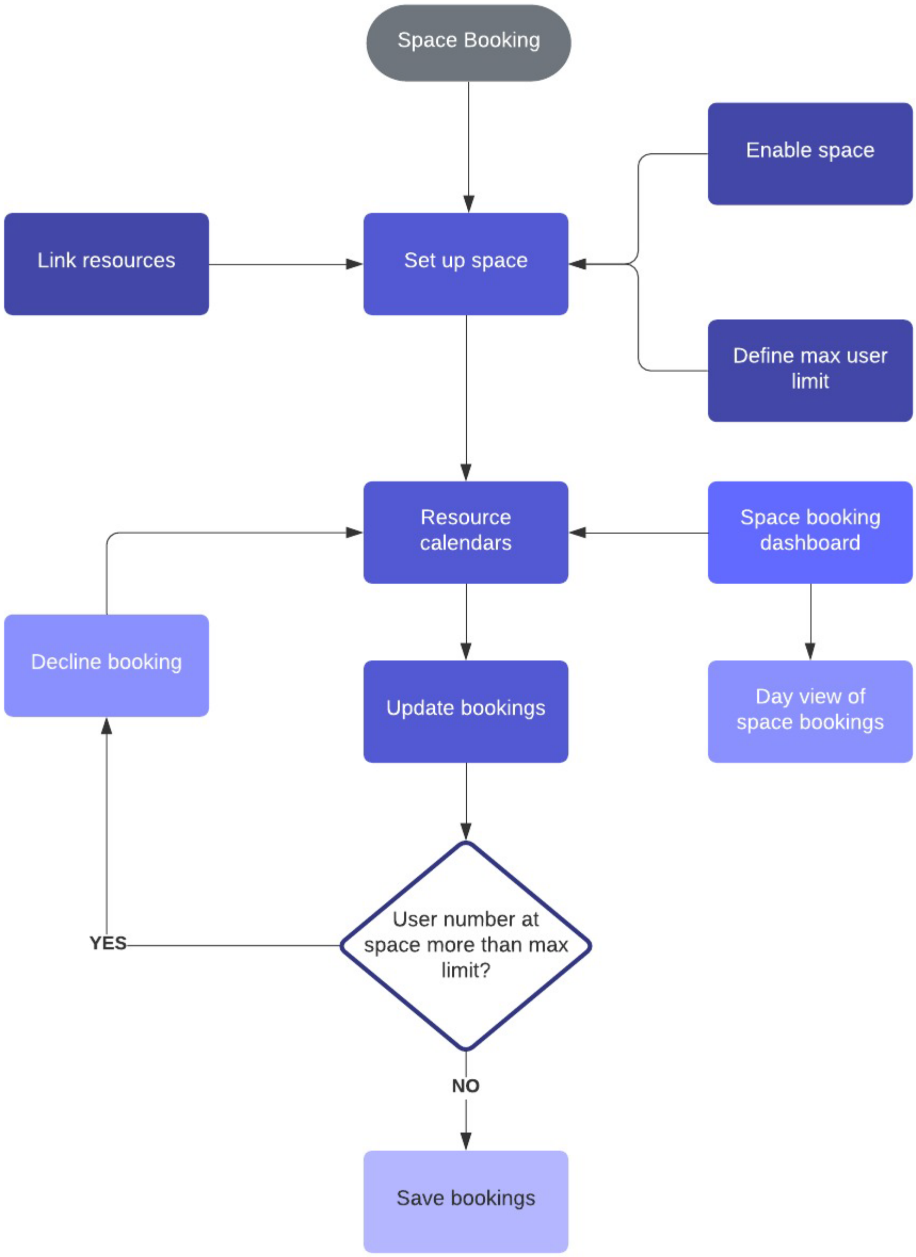
To comply with COVID-19 social distancing regulations, you can set up a lab space with social distancing restrictions. This places a limit on the maximum number of concurrent people at a workspace.

- Case study #1:

A lab space houses 5 tools, but only allows 4 users working concurrently. The social distancing feature still allows you to link all 5 tools to the same lab space, despite being in different resource groups. Resource groups and social distancing lab spaces are set up separately.

- Case study #2:

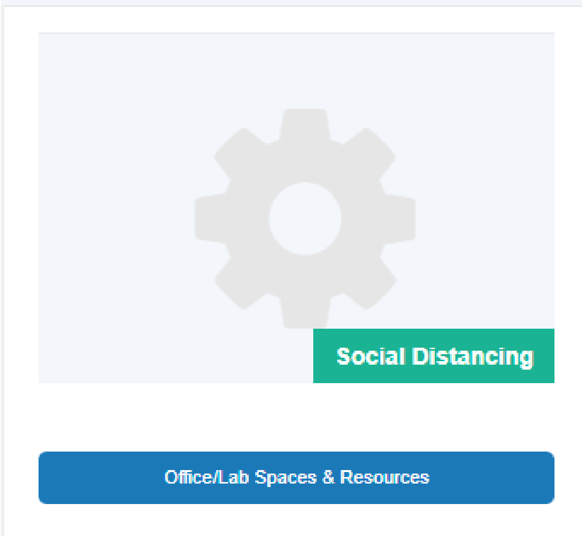
A lab space can completely halt lab bookings. This is achieved by setting the user limit to zero, which blocks all further bookings.



As a general overview, a lab space is defined with a number of linked resources and a max user limit.

6.48.1 Create spaces

Go to ***Staff tab -> Resource Manager -> Office/Lab Space***.



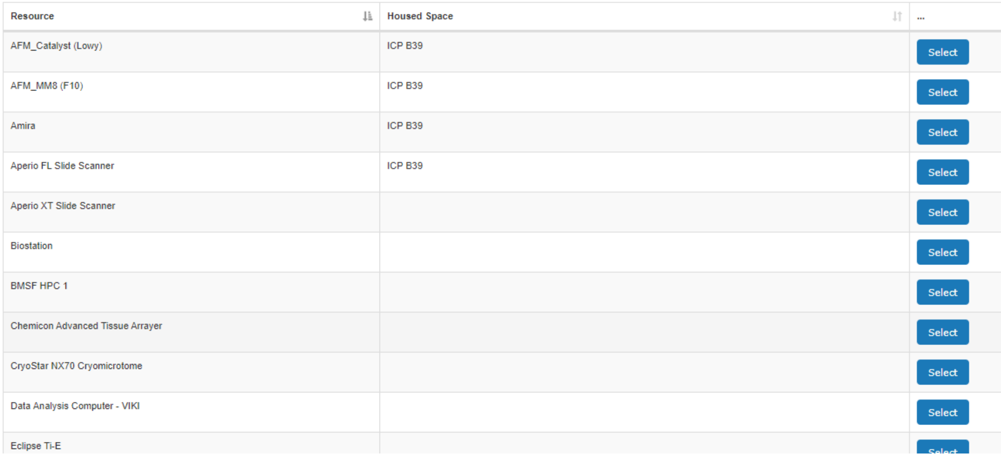
You can add/ a lab space and its properties.

Space name	ICP B39
Building name	F10
Building level	Basement
Building room	B39
Housed resources	AFM_Catalyst (Lowy) AFM_MM8 (F10) Amira
Limit the concurrent number of users at space	☑
Allow the max concurrent number of users at space	1
Note	
Status	☑

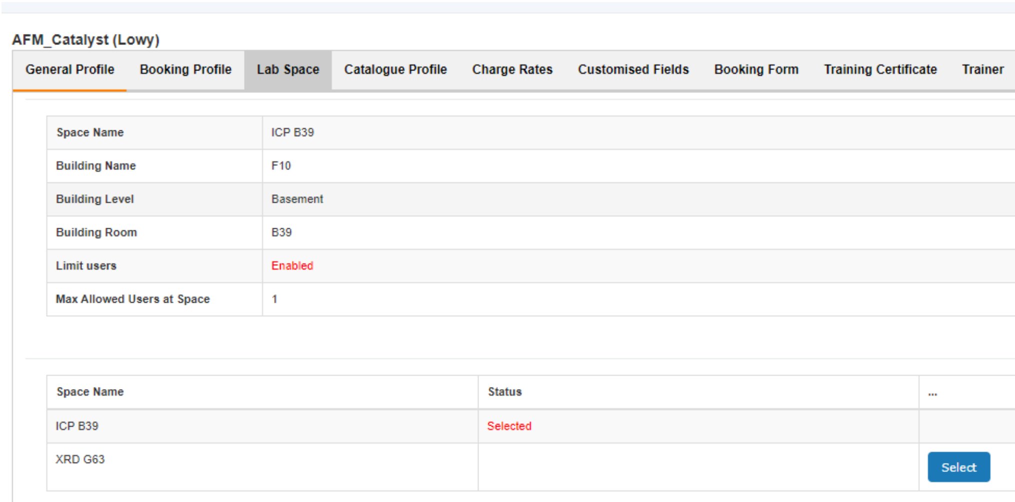
Accept

Initial setup of the lab space involves defining the following attributes: name, location, the resources within the space, any required user limitation, and the number of maximum concurrent users (if required).

Defining the resources within the space involves linking resources to the lab space.



Alternatively, you can directly assign a resource to a lab space by going to the resource profile in the Resource Editor.



6.48.2 Space booking – resource calendar

If the space booking is enabled, users will be able to book the space via the space booking dashboard on the resource calendar page.

AFM_Catalyst (Lowy)

Accept future bookings only

Switch to day/week view by clicking on DATE as link

Permitted Hours: 00:00 - 24:00

Account for Booking: Internal Account (Rate/Hour: $0.00)

Social Distancing

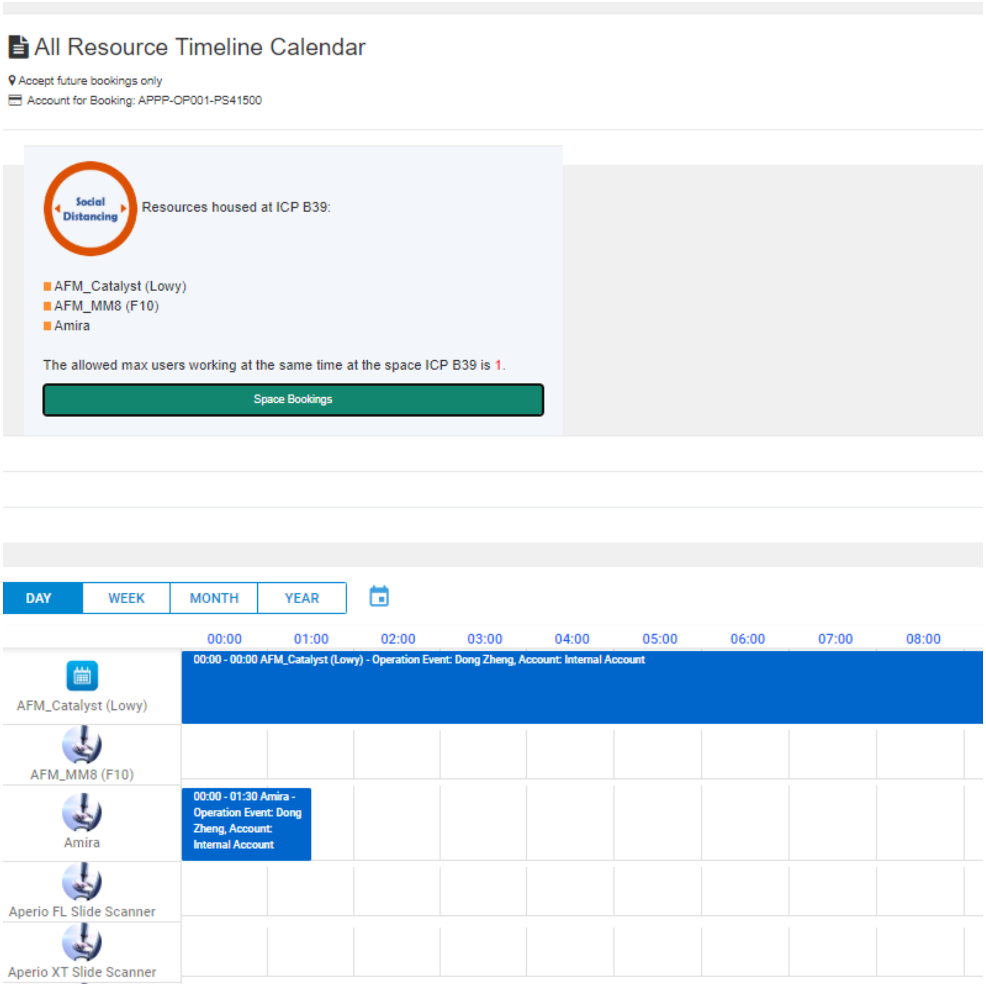
Housed at ICP B39; the allowed max users working at the same time at the space ICP B39 is 1.

Space Bookings

SWP06.18_BMIF_AFM Catalyst Microscope.doc

Like the resource booking calendar, users can look through a lab space's booking information and existing bookings. The timeslots throughout the day are visualized with additional notes for any vacancies.

6.48.3 Space booking – timeline calendar



Similar to the resource booking calendar, the lab space calendar also provides a timeline view of any bookings already made.

6.48.4 Is space booking about limiting the bookings?

The space booking is not about limiting the booking numbers. It is about limiting the number of concurrent users within a lab space. For example, a single user can book multiple resources within the lab space, but that user still counts as just one user for the purposes of the space booking.

6.48.5 What calendars are applied to space booking feature?

The space booking restrictions only apply to bookings in the “operation booking” category. Other categories used by staff (e.g training, group, commercial) are not bound by the space booking restrictions. Staff members should keep in mind the social distancing restrictions when making bookings that bypasses the space booking restriction.

6.49 Loan-Type Resources

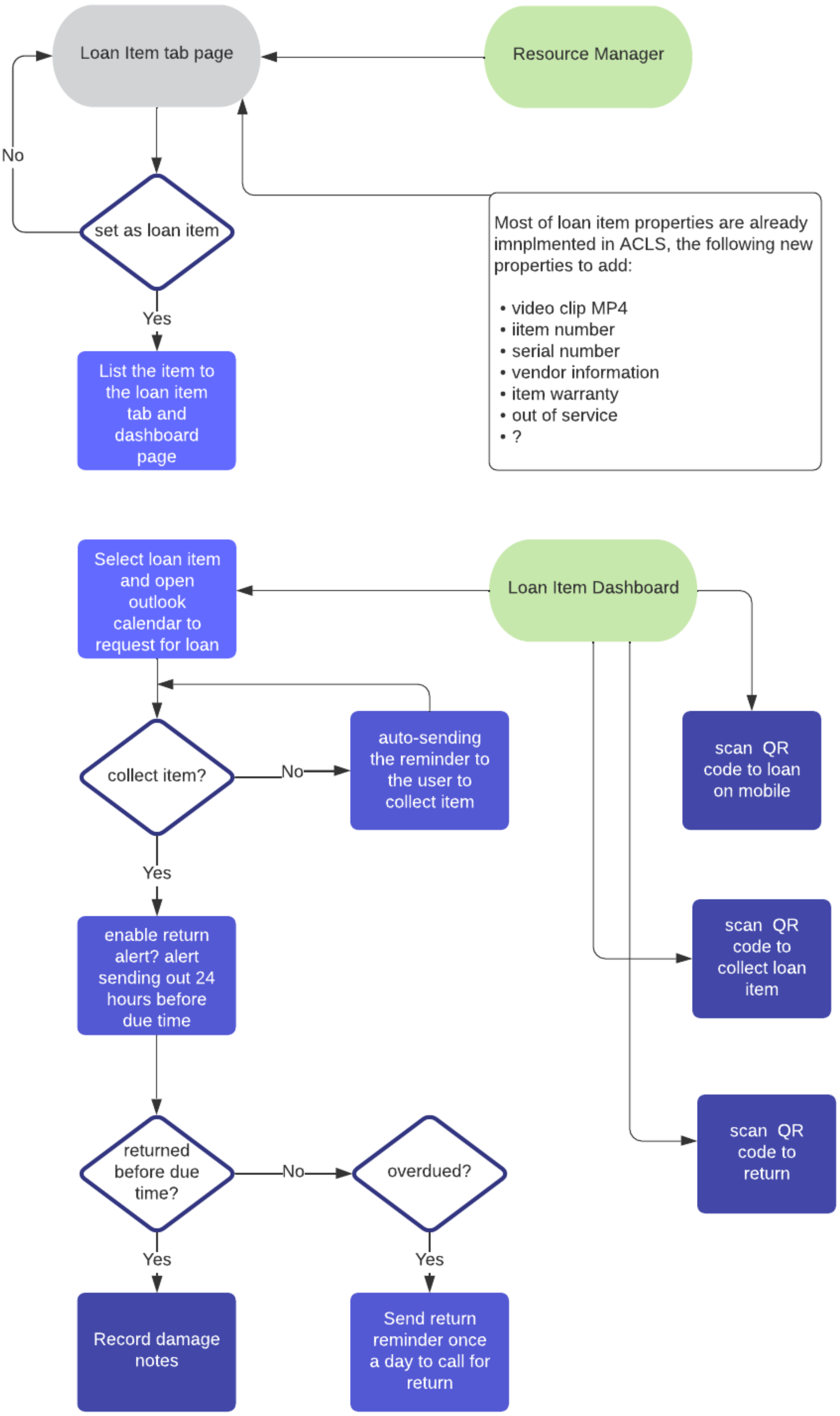
6.49.1 Working concept

The Loan Resource/Item module in ACLS operates like a library. Like borrowing a book, the Loan Resource module operates with three main features:

- Book items
- Collect items
- Return items

The loan item module records every loan record so items won't go missing without traceability.

A barcode scanner or dedicated checkout computer is not required, as collections and returns are carried out with a QR code system.


Loan Item tab page
Resource Manager
No
set as loan item
Yes
List the item to the loan item tab and dashboard page
Most of loan item properties are already innplmented in ACLS, the following new properties to add:
• video clip MP4
• iitem number
• serial number
• vendor information
• item warranty
• out of service
• ?
Select loan item and open outlook calendar to request for loan
Loan Item Dashboard
collect item?
No
auto-sending the reminder to the user to collect item
scan QR code to loan on mobile
Yes
enable return alert? alert sending out 24 hours before due time
scan QR code to collect loan item
scan QR code to return
returned before due time?
No
overdued?
Yes
Yes
Record damage notes
Send return reminder once a day to call for return

6.49.2 *Set up resource as loan item*

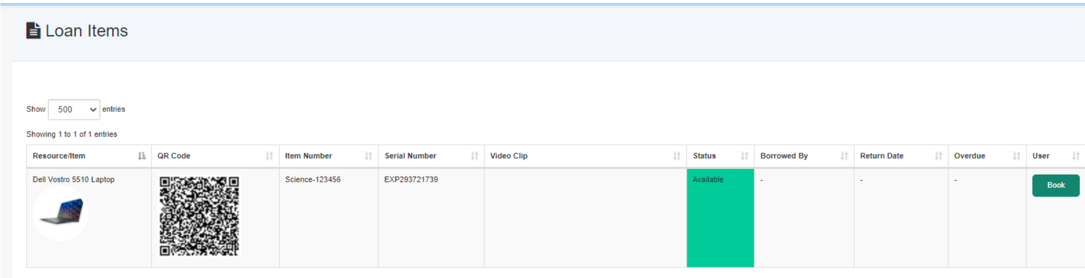
Go to the profile of a resource in the Resource Manager page to add/edit the resource as loan item. If the resource is set as loan item, it will be removed from the resource booking calendar.

Additional information that can be added to the loan item:

- Item number (for example, a service tag number)
- Product serial number
- Quantity (how many are available to loan)
- Purchased date
- Product vendor information
- Product warranty information
- Youtube video (a Youtube embed code)

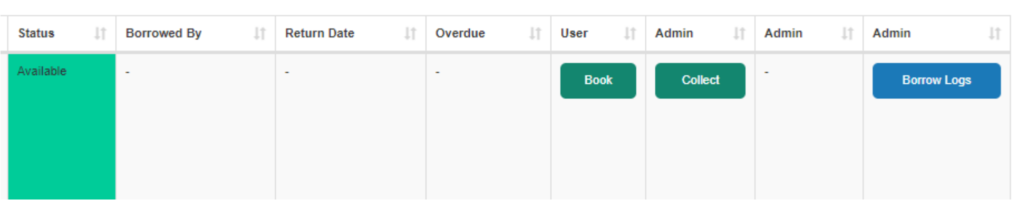
6.49.3 *Book loan item (user)*

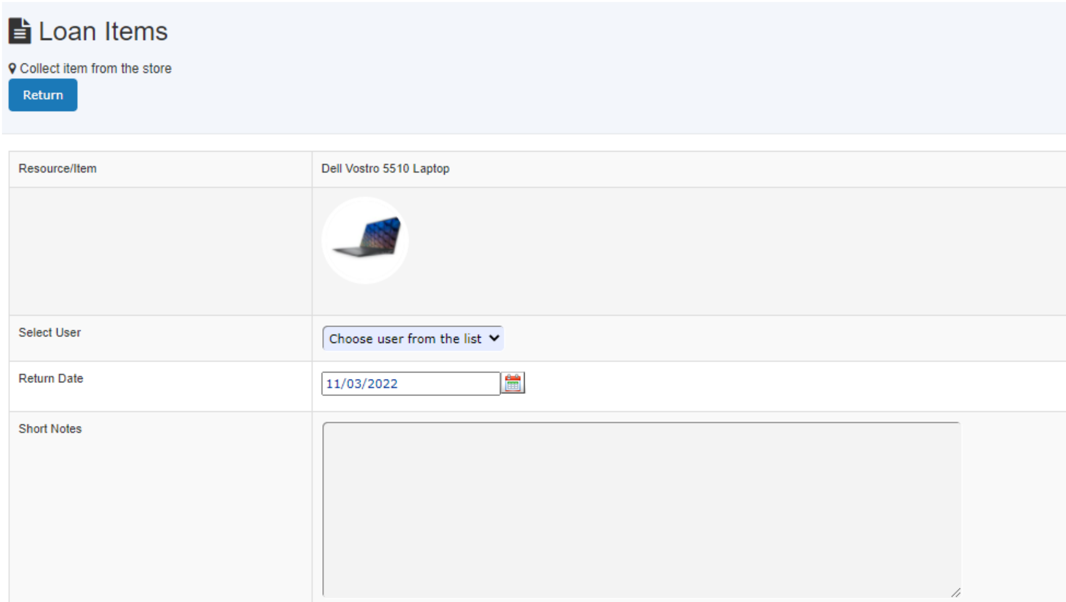
Users can loan items on the Loan Resources dashboard tab. Clicking on Book will take you to a calendar to specify the start time. After placing the loan booking, you can pick up the item at the lab office or store.



6.49.4 *Collect loan item (admin)*

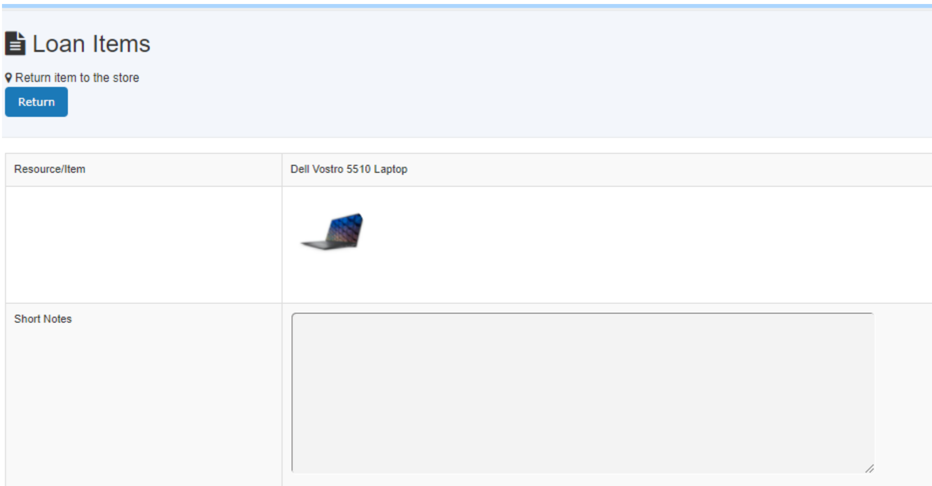
Admins should use the Collect button after a user has collected the item for loan. This records the handing off of the item to the user. Along with this, you will also need to record the user, return date, and any optional notes.





6.49.5 Return loam item (admin)

After an item has been marked as collected, the Return button is made available. Clicking the Return button records the loan item being returned. Historical Collection and Return logs are made available to admin staff.



6.49.6 Loan item QR code

Like a resource booking QR code, the loan item QR code takes the user to the item loan page for the user to fill out.

For admins, the loan logs would specify if the user submitted a loan booking using the desktop website or mobile QR code page.

6.50 Last booking of the certified active users

In ***Training Manager***, you can capture the last booking of the selected resource certified users so to check the impacts of certificate expiry setting change.

The result table highlights the last booking in red that is earlier than 12 months up to date.

Start Time of Last Booking	End Time of Last Booking	Earlier Than (Days)
25/08/2020 10:30	25/08/2020 13:00	1060
16/10/2020 14:00	16/10/2020 15:30	1008
13/12/2019 13:15	13/12/2019 13:45	1316
21/10/2020 13:30	21/10/2020 17:00	1003
05/10/2021 13:00	05/10/2021 16:00	654
27/06/2023 14:00	27/06/2023 16:00	24
26/02/2020 23:45	27/02/2020 00:00	1240
12/05/2022 04:30	12/05/2022 05:00	435

6.51 Resource maintenance profile

Vert often, labs need to set up detailed preventive maintenance schedule and track the cost over time.

The maintenance profile is added to the resource profile to manage the maintenance activities, schedule, and cost. The maintenance profile covers the following properties of the scheduled maintenance activities.

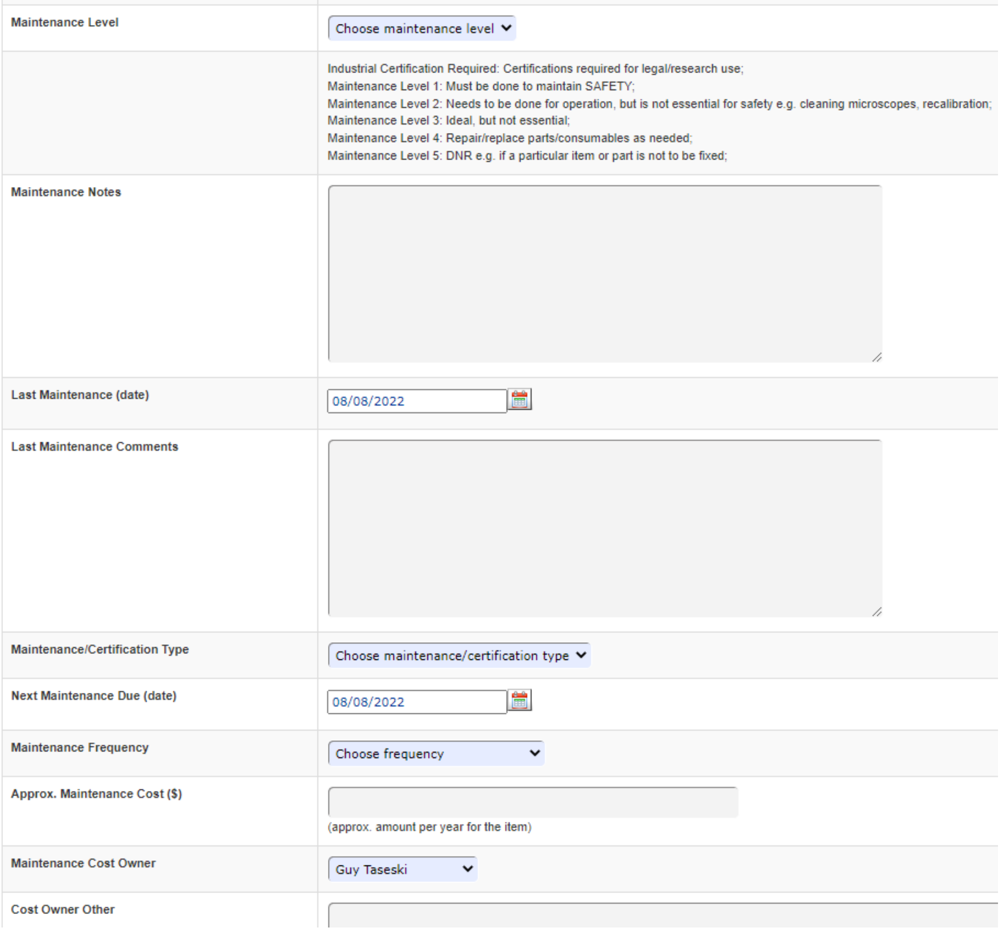
- Resource brand
- Resource model
- Resource serial number
- Maintenance level
- Last maintenance date
- Last maintenance comments
- Maintenance/certificate type
- Next maintenance due date
- Maintenance frequency
- Estimated maintenance cost
- Maintenance cost owner
- Cost owner others

6.51.1 Enable resource maintenance profile feature

Please contact ACLS system administrator to enable resource maintenance in the global setting. This setting is disabled by default.

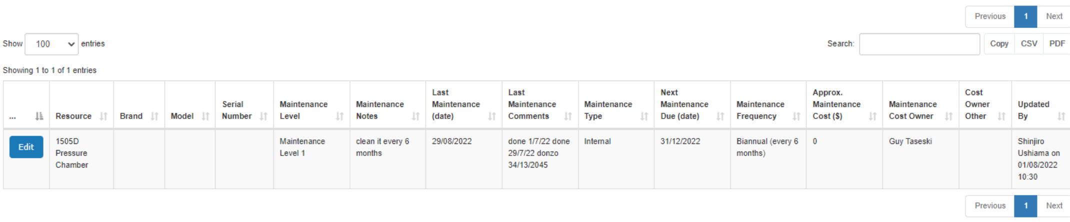
6.51.2 *Set up resource maintenance profile*

Go to ***Resource Manager*** page to add/edit resource, then click on Maintenance tab.



Maintenance Level	Choose maintenance level
	Industrial Certification Required: Certifications required for legal/research use; Maintenance Level 1: Must be done to maintain SAFETY; Maintenance Level 2: Needs to be done for operation, but is not essential for safety e.g. cleaning microscopes, recalibration; Maintenance Level 3: Ideal, but not essential; Maintenance Level 4: Repair/replace parts/consumables as needed; Maintenance Level 5: DNR e.g. if a particular item or part is not to be fixed;
Maintenance Notes	
Last Maintenance (date)	08/08/2022
Last Maintenance Comments	
Maintenance/Certification Type	Choose maintenance/certification type
Next Maintenance Due (date)	08/08/2022
Maintenance Frequency	Choose frequency
Approx. Maintenance Cost ($)	(approx. amount per year for the item)
Maintenance Cost Owner	Guy Taseski
Cost Owner Other	

Resource brand, model and serial number are entered on Catalogue profile page. ACLS stores each entry for maintenance.



Previous 1 Next

Show 100 entries

Search: Copy CSV PDF

Showing 1 to 1 of 1 entries

...	Resource	Brand	Model	Serial Number	Maintenance Level	Maintenance Notes	Last Maintenance (date)	Last Maintenance Comments	Maintenance Type	Next Maintenance Due (date)	Maintenance Frequency	Approx. Maintenance Cost ($)	Maintenance Cost Owner	Cost Owner Other	Updated By
Edit	1505D Pressure Chamber				Maintenance Level 1	clean it every 6 months	29/08/2022	done 1/7/22 done 29/7/22 donzo 34/13/2045	Internal	31/12/2022	Biannual (every 6 months)	0	Guy Taseski		Shinjiro Ushiama on 01/08/2022 10:30

Previous 1 Next

Show 100 entries

Showing 1 to 1 of 1 entries

...	Resource	Brand	Model	Serial Number	Maintenance Level	Maintenance Notes	Last Maintenance (date)	Last Maintenance Comments
Edit	1505D Pressure Chamber				Maintenance Level 1	clean it every 6 months	29/08/2022	done 1/7/22 done 29/7/22 donzo 34/13/2045

Previous 1 Next

Search: Copy CSV PDF

Maintenance Type	Next Maintenance Due (date)	Maintenance Frequency	Approx. Maintenance Cost ($)	Maintenance Cost Owner	Cost Owner Other	Updated By
Internal	31/12/2022	Biannual (every 6 months)	0	Guy Taseski		Shinjiro Ushiama on 01/08/2022 10:30

Previous 1 Next

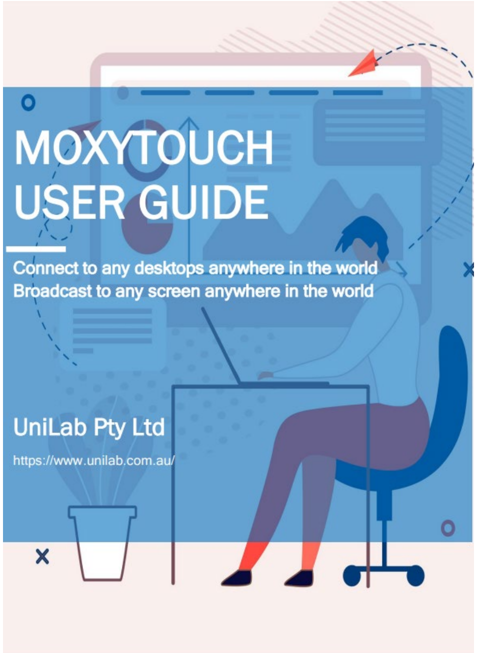
6.51.3 Alert on next maintenance due date

ACLS sends out the reminder or alert 10 days or 30 days before next maintenance due date to the global contact us email, and resource cost owners.

6.52 MoxyTouch Service (Powered by UniLab)

MoxyTouch is a cloud-based solution connects and casts to any screens anywhere in the world (***https://moxy.unilab.com.au/moxytouchsite/***). Container and DIY widgets provides a flexible option to set up screen contexts, including the feature of social distancing management and notification for work space, lab space and office space.

We collaborate with UniLab to deliver digital and smart lab solutions to research institutes, labs and communities.



6.52.1 *Live ACLS Charts to MoxyTouch*

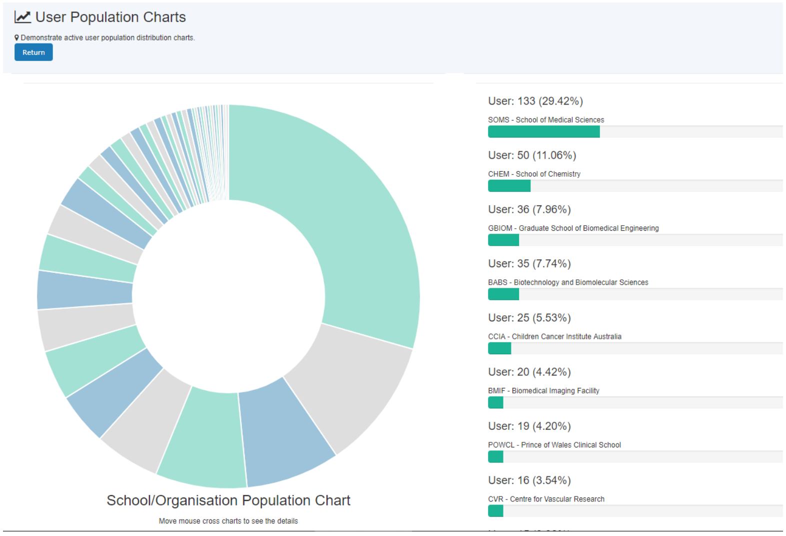
In addition to streamline the calendar data to Moxy for onscreen update, you can streamline the lab data analytics to Moxy as well.

- Growth charts

  Growth charts demonstrate the trend of the user growth over years, and over months in the selected year. Using the charts, lab can foresee the future growth potential and provide a better strategy to meet the research demands.

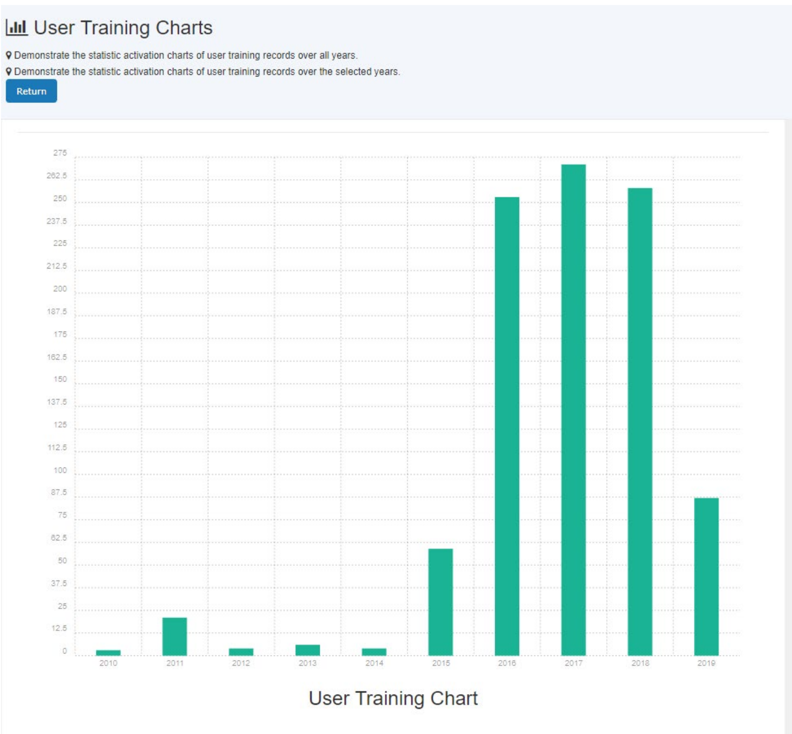
- Population charts

Population and geographic charts indicate the user population distributions. Using the charts, lab can work out a better strategy to meet the research demands of the major research groups.



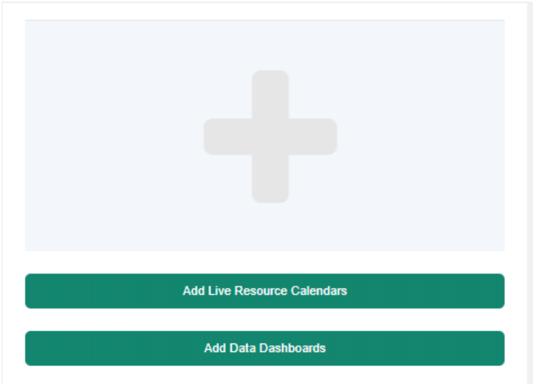
- Training charts

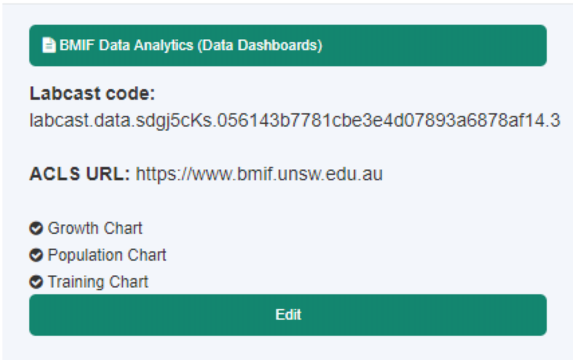
Training charts show the training records over years, and over months in the selected year. Using the charts, lab can foresee the future training demands and work out a better way to meet the training demands.



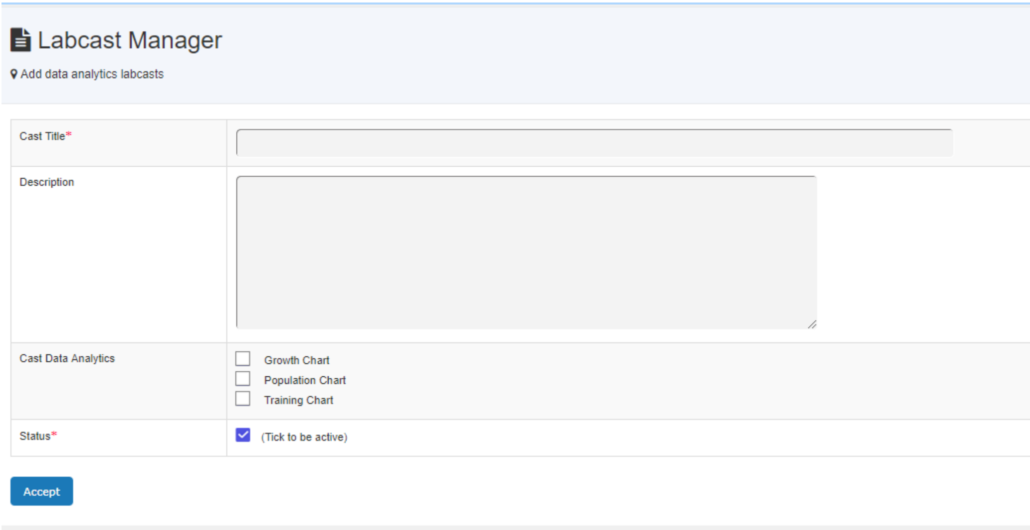
- How to Set Up Labcast Data Dashboard to Moxy

Upon login to ACLS, go to ***My Labcast*** to get started.

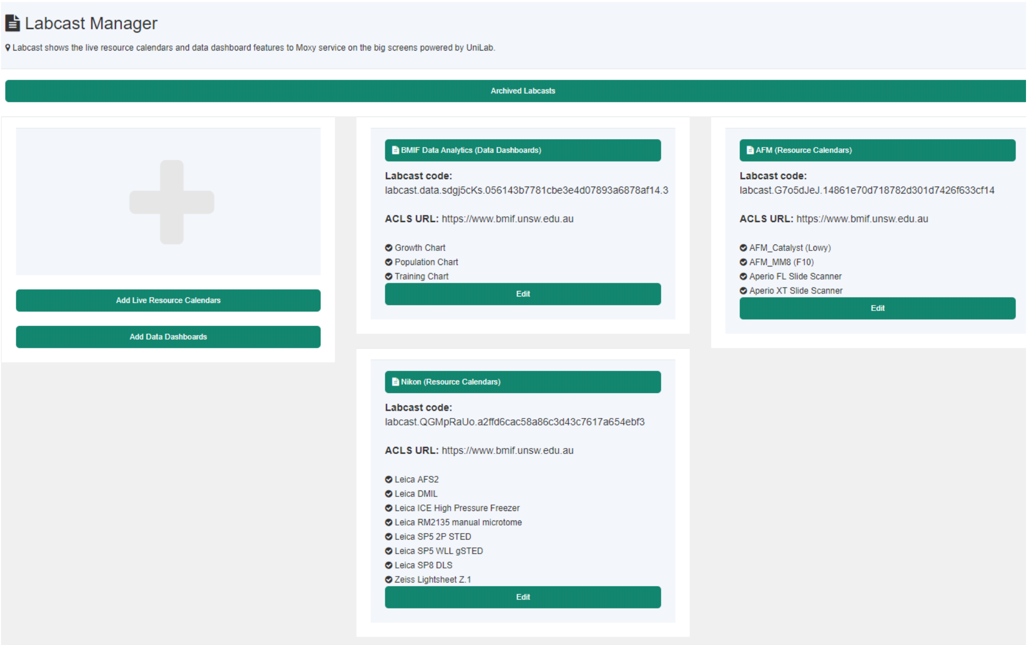




Simply tick the checkboxes to choose.

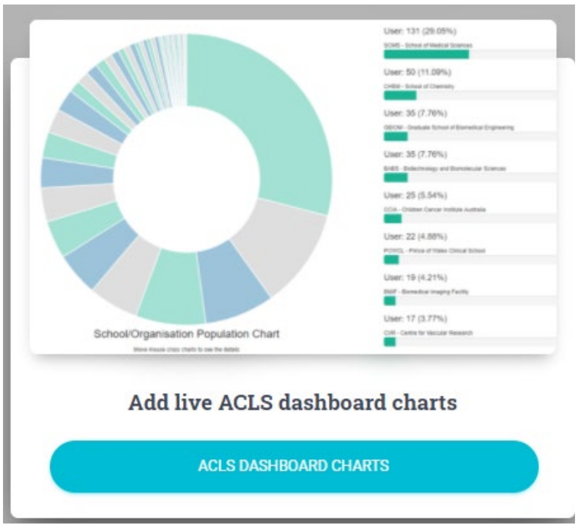


The result of example shows here.

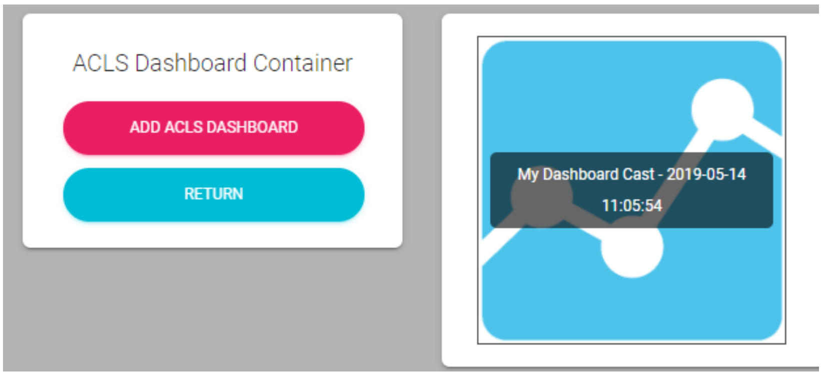


- How to Set Up Moxy

Go to Dashboard container to set up dashboard.



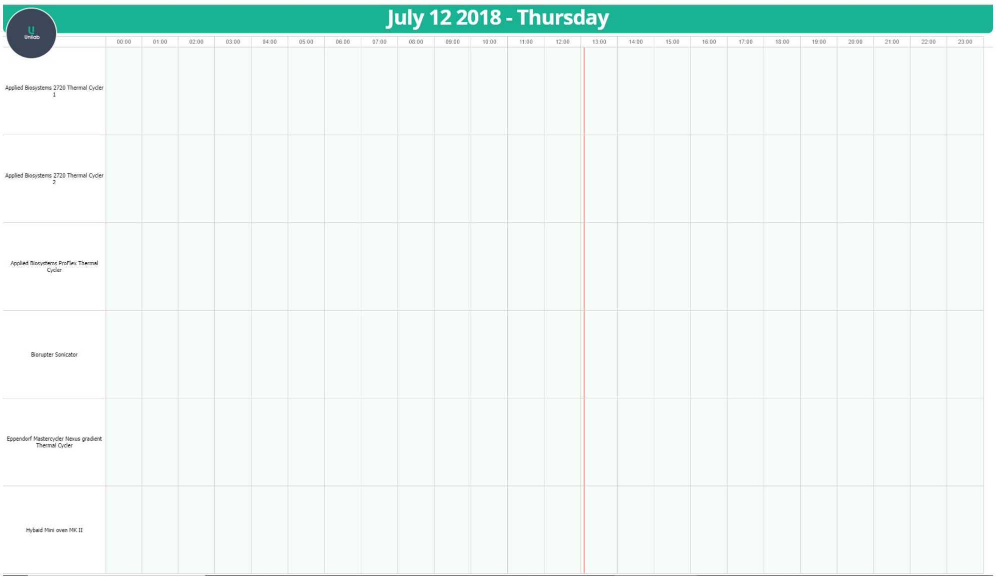
You can preview the live dashboard on your desktop. Please contact UniLab support if you wish to know more.



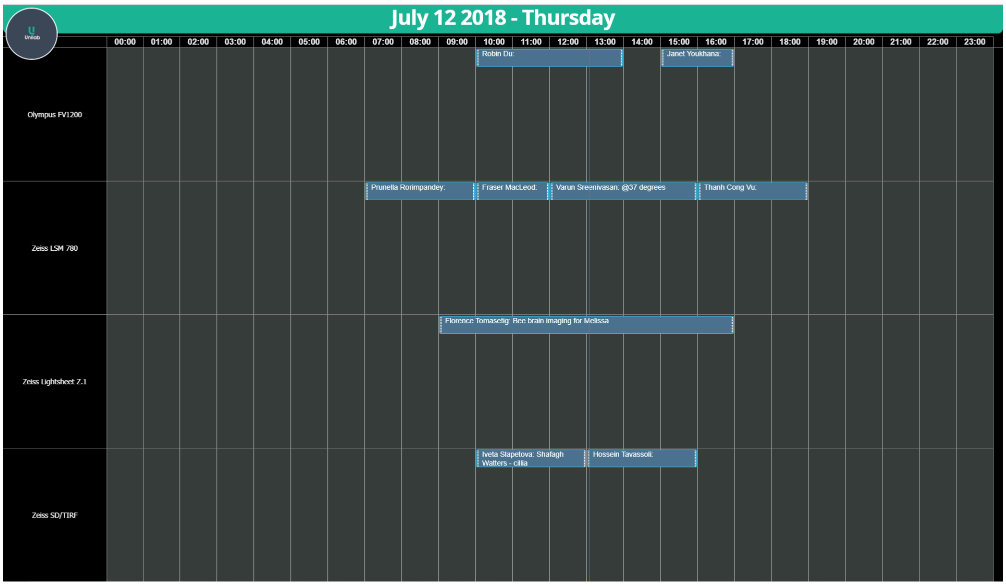
6.52.2 Live ACLS Calendars to MoxyTouch

Through MoxyTouch and Labcast, **LIVE** booking calendars can cast to one or multiple display screens and kiosk touch screens. You can set up the screen at the entrance of the lab, PC2/PC3 labs, or clean rooms so users and staff can view the current bookings before entering the lab areas. It works like airport arrival and departure display board. Currently, Labcast provides two calendar theme, standard (white background) and dark (dark background) as shown below.

- Standard Calendar theme



- Dark Calendar Theme

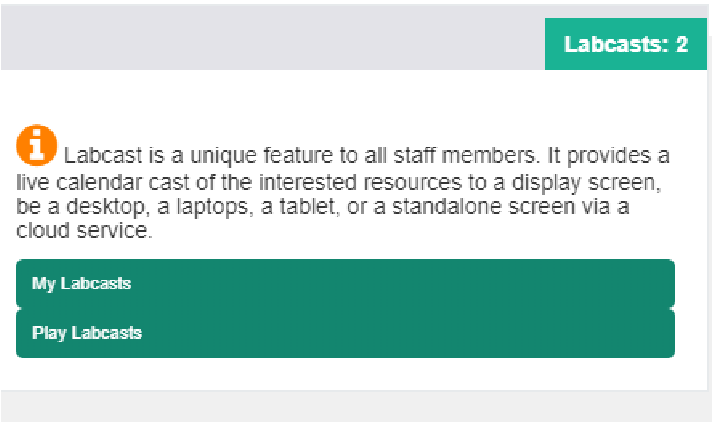


Dark theme suits for darker lab area environment, such as microscopy rooms.

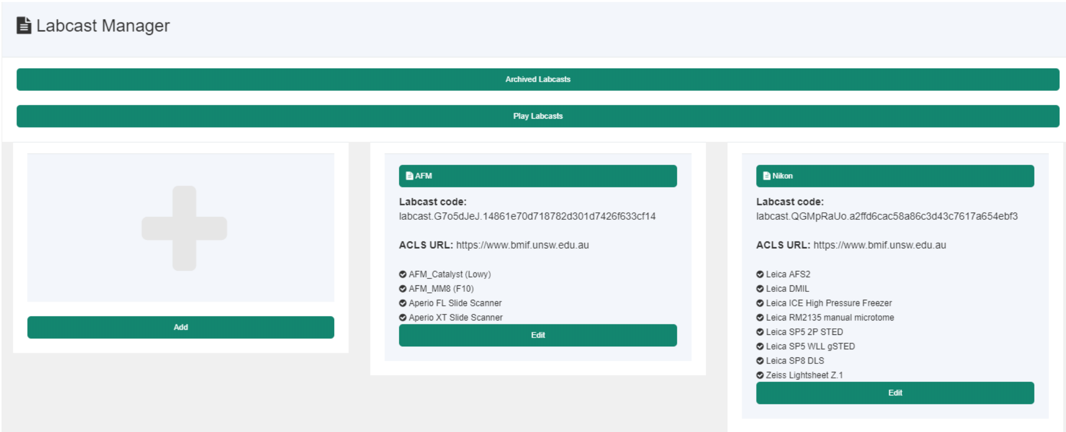
Labcast feature is only available to lab staff. To set up Labcast, you need to configure the Labcast in ACLS and also sign up to Moxy service.

- Set up Labcast in ACLS

  Upon sign in to ACLS, the landing page shows Labcast feature tile.



Click on ***My Labcast*** to set up resource casting calendars. You can go with a single resource calendar or group any resources as you wish. Recommend that each cast limits to no more than 15 resources. Labcast service can show any number casts as you wish, so you don't have to cast more than 15 resource calendars onto a single page.



That is all you need to do in ACLS!

- Set up Labcast in Moxy

Moxy service powered by **UniLab** is implemented and available to operation at ***https://moxy.unilab.com.au/.***

To publish your media containers to screens (indoor or outdoor), you need to have a cast unit, a name card size box, each device comes with unique ID. The device is powered by a USB connection to the pc or the monitor, or small power adaptor. Connecting HDMI cable to the monitor, and turn the cast unit on, it goes to the selected casts straight. This is the elegant plug and play solution provided by UniLab.

Please contact UniLab at support@unilab.com.au to request for demo.

6.52.3 Consumable and Resource Widgets with MoxyTouch

The data sharing between Moxy service and ACLS is completed, so lab users and staff can take advantage of the QR codes on touch screen to record consumable usages and to access resource information and edit resource bookings.

- MoxyTouch - Resource QR Code Operation

Working with UniLab, a digital and responsive resource QR code is implemented through **Moxy Widget -> Resource QR Code Widget**.

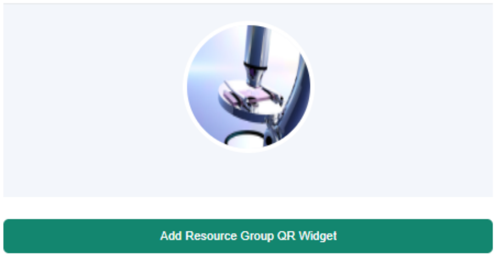
Here is the example for the implementation demo at https://moxy.unilab.com.au/screeninvite.php?invite=33be67fbe795f6479907619525365a9d.

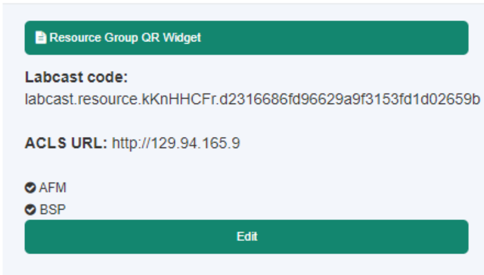
- MoxyTouch - Consumable QR Code Operation

Working with UniLab, a digital and responsive consumable QR code is implemented through **Moxy Widget -> Consumable QR Code Widget**.

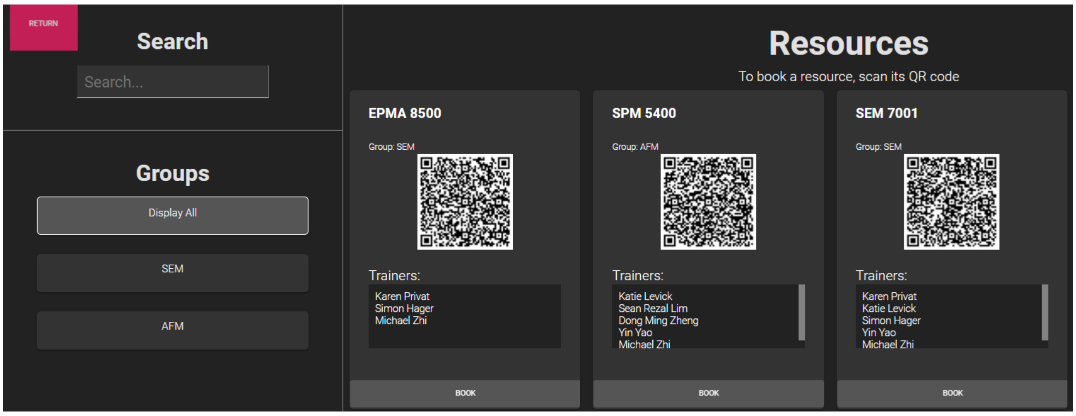
Here is the example for the implementation demo at https://moxy.unilab.com.au/screeninvite.php?invite=33be67fbe795f6479907619525365a9d.

In addition to all resource QR widget feature for Labcast, a new Labcast feature is added to ACLS. You could set up the selected resource group QR widget onto MoxyTouch-LAB screens.



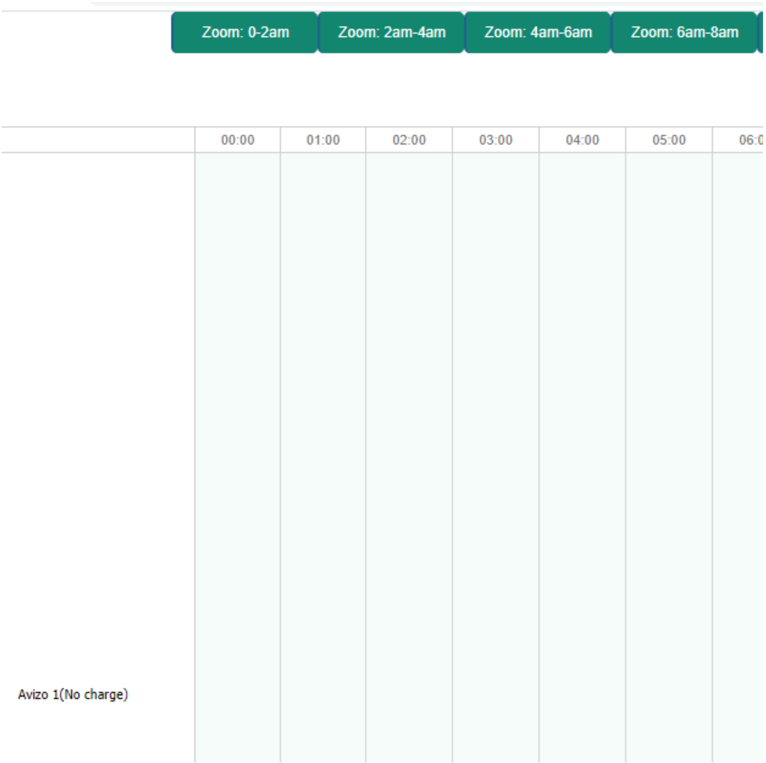


Users and staff could access the selected resource groups to book on touchscreen or use smart phone to scan QR codes.

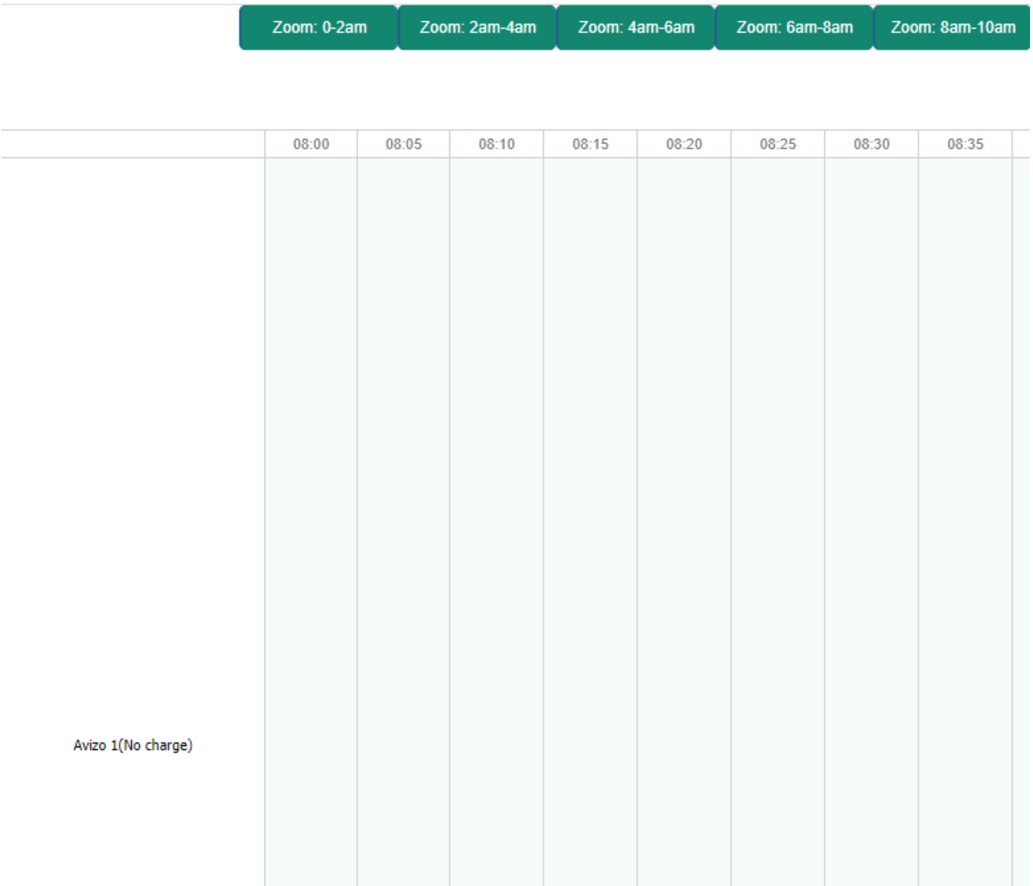


Due to the time scale limit, it is not visible for the shorter bookings. Zoom in for 5-minute time scale per two hours to make the shorted booking details visible and clear.

Before zoom in on one hour time scale:



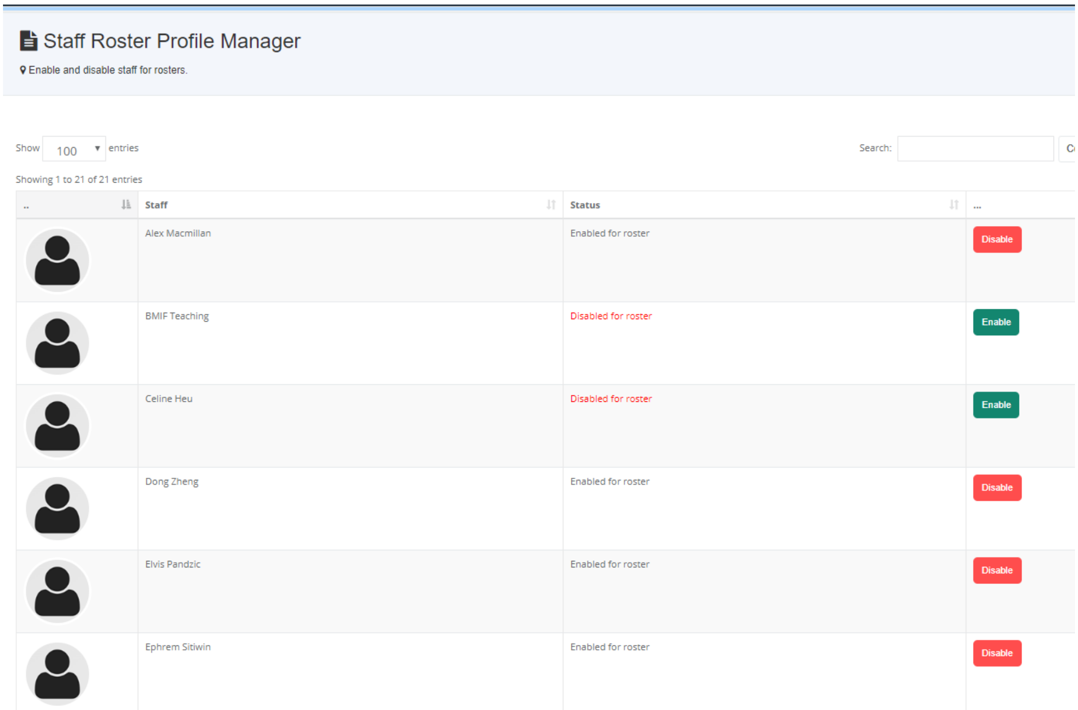
After zoom in to 8am to 10am on 5 minute time scale:



6.52.4 Staff Roster Calendar with MoxyTouch

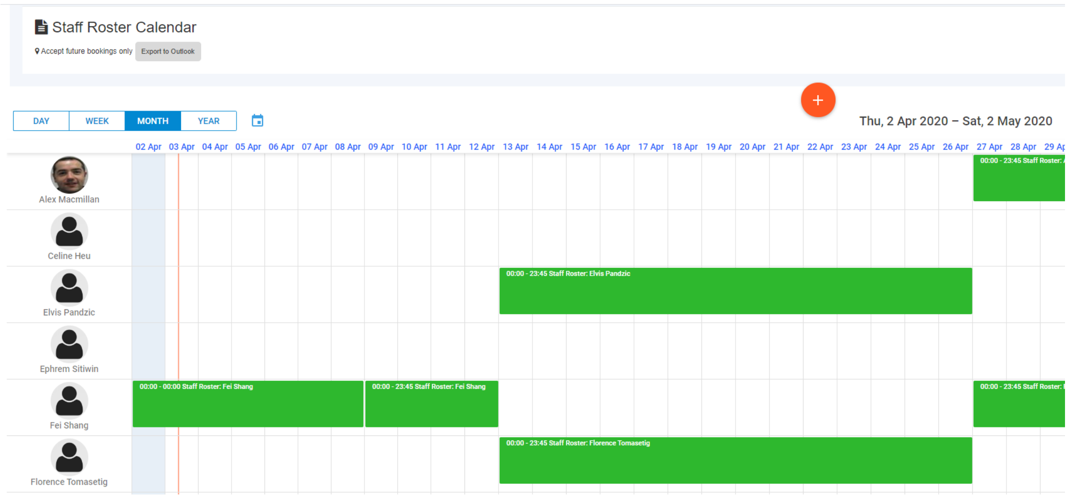
In response to CONIV-19 outbreak, staff roster calendar is implemented and can be shared with Outlook and MoxyTouch (physical or virtual screen).

Step 1: select staff on rosters. Go to **Staff tab -> User Profile -> Staff Roster Profile Manager**, enable to turn on roster, disable to turn off roster.



Step 2: set up roster calendar, go to Booking tab -> Staff roster calendar to start. ACLS sends out the email notification to all staff on rosters for any changes on roster calendar. You can export the calendar to Outlook or MoxyTouch. For Outlook, it is rather personal to see the shared rosters. For MoxyTouch, it can provide a public URL for display on website or just email the URL to anyone to view the staff rosters.

Week view is the best option for full day roster bookings.

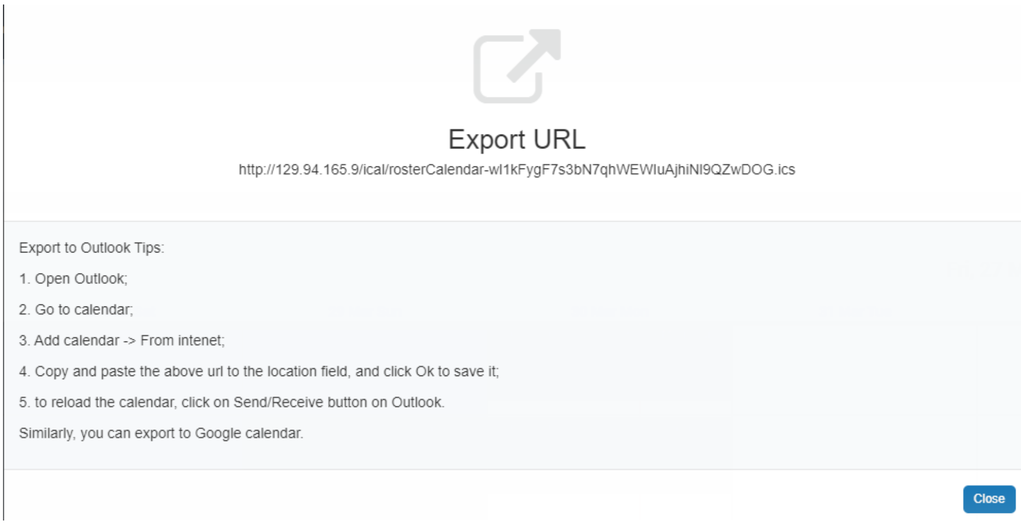


- Can any staff edit any roster bookings?

  Yes, the roster calendar has no booking limit or controls.

- Export to Outlook

  There is a URL available in the roster calendar and set up instructions for Outlook. Here is a screen print for example.



- Export to MoxyTouch

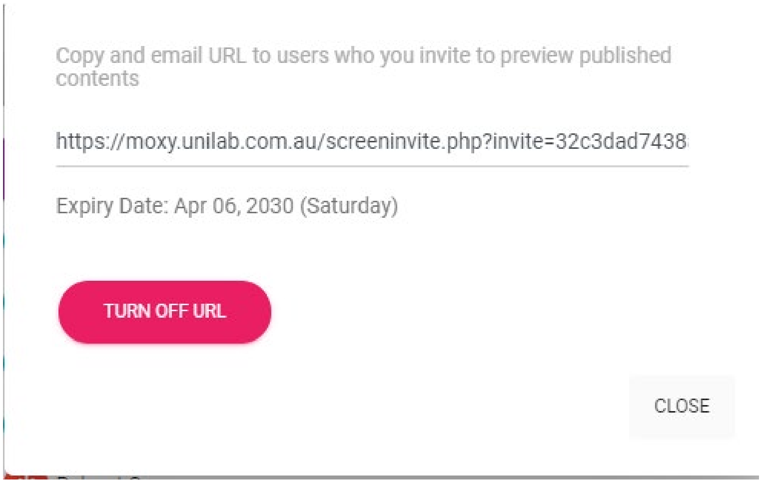
  MoxyTouch is a responsive and DIY screen solution provided by UniLab. Here is the advice on how to connect with MoxyTouch at https://moxy.unilab.com.au/moxytouchsite/accessmoxytouchhow.php.

  Step 1: Go to **Moxy Container -> Widget -> Outlook Widget** to copy and paste roster URL to the outlook calendar container

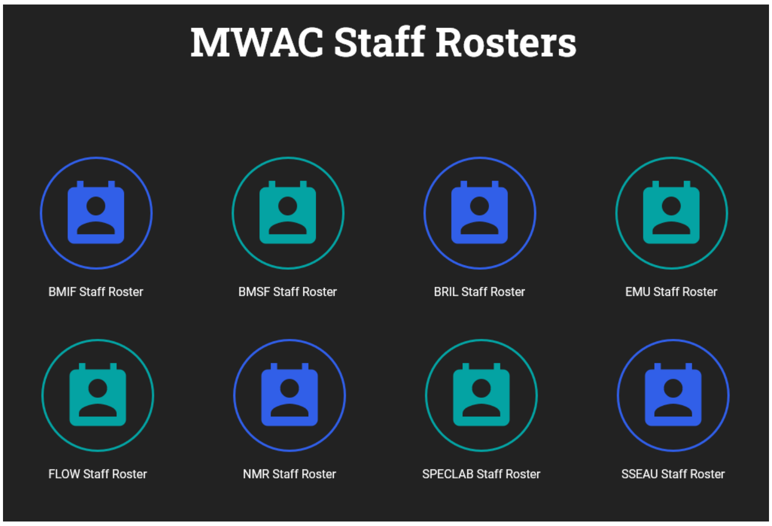
  Step 2: Go to **MoxyTouch -> MoxyTouch Screen** to publish the calendar

  Step 3: Preview Moxytouch

  Step 4: Copy the public URL to use for email broadcasting or on website.



One MoxyTouch can provide more features than a single roster, you are encouraged to use it more for other dashboard and information sharing.



- Can general users access the staff roster after login to ACLS?

  Yes, system admin needs to copy the MoxyTouch public URL to the ACLS global parameter panel by System Settings -> Configure System, the parameter field name is **Staff Roster URL**

- Can we turn off the email notification as all staff can access Staff Roster Calendar anyway?

  Yes, system admin needs to disable the parameter panel by System Settings -> Configure System, the parameter field name is **Enable Staff Roster Notification**

6.52.5 *User Training Records with MoxyTouch*

Like the consumable and resource settings, you can connect ACLS to Moxy service to display user training records for staff and safety officers to check onsite.

6.52.6 *User Sign In with MoxyTouch*

You can set up a touch screen which is linked to ACLS so users can sign in the lab space by selecting his name from the dropdown list. This is a new feature for MoxyTouch, please contact UniLab at support@unilab.com.au to request for demo.

6.53 MoxyBot Service (Powered by UniLab)

Driven by OpenAI enterprise LLM, MoxyBot offers a chat bot solution to serve as a research lab knowledge bot (***https://moxy.unilab.com.au/moxybotsite/***).

6.53.1 *Lab knowledge bot*

- **AI-driven dedicated knowledge bot:** moxyBot is an AI-driven knowledge bot that leverages artificial intelligence to enhance user and researcher interactions.
- **24/7 availability:** moxyBot ensures round-the-clock availability, providing users and researchers with instant support anytime they need it.
- **Instant response time:** moxyBot delivers immediate responses to user and researcher queries, improving use and researcher satisfaction and engagement.
- **Supports multiple languages:** moxyBot is designed to assist user and researcher in various languages, catering to a diverse user and researcher base globally.

6.53.2 *Lab pain points*

- **Unavailable after-hour support:** Users and researchers working onsite after hours could not locate the staff for assistance.
- **Inconsistent responses:** Users and researchers receive varying and inconsistent answers from different staff and channels**.**
- **Fragmented document search:** Users and researchers have a hard time to find the answers from hundreds of procedures, guides, manual and training materials stored in various places.
- **Inefficient knowledge retrieval:** Users and researchers want to access extensive knowledge base to provide accurate and relevant information.

6.53.3 Bot key benefits

- **Information queries:** Provide content creation only with the trained documents for a wide range of questions about lab knowledge.
- **Easy to extract:** Extract information when searching for intelligent answers**.**
- **Streamlined process and workflows: e**xperimental designs, quick start guides and training.
- **Scalability:** Scales easily to manage increased or changed training data and to retrain Bot.
- **Educational tool:** Useful tool for training and tutoring, explaining the lab operations in simple terms.

6.53.4 Data for Bot training

Lab decides the documents to use for training bot.

- **non-personal**
- **work procedures**
- **operation procedures**
- **training materials**
- **equipment guides**
- **software manuals**

6.53.5 Bot proven results

ACLS knowledge bot is a success story by using MoxyBot. ACLS knowledge bot helps to reduce the inconsistent answers, reduce the workload for ACLS admin, improve user experience with the 24x7 support, and provide instant and structural answers.

6.53.6 Lab knowledge bot demo

Please contact UniLab at support@unilab.com.au to request for knowledge bot demo.

7 Frequently Asked Questions

7.1 Login and Logout

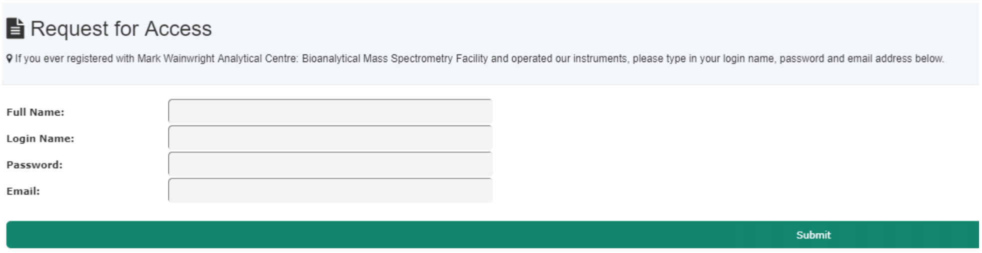
1. I tried to login but was not successful, what should I do?

Your login was unsuccessful for one of the following reasons:

- Incorrect login name
- Incorrect password

You can submit a reactivation request by clicking on ***Access Denied or Reset Password*** *on Login Page.*

Complete the reactivation form and select **Submit** to send the request.



2. How can I exit the system?

Simply close the Internet browser windows or click on the user photo to expand and click ***Logout*** *button as shown below.*

3. Why could UNSW students/staff not sign with zID?

Please ensure to include letter z in the front of digits of ID

4. What is the enterprise sign in page (SSO)?

Please contact us to deploy enterprise SSO sign in service that provides two options to sign in: University student/staff sign in and external user sign in.

7.2 Online Registration

5. I submitted an online registration application, but it got lost. What should I do?

Always print a hardcopy of your online registration for future reference. Contact the staff member.

6. What happens when I have completed my online registration?

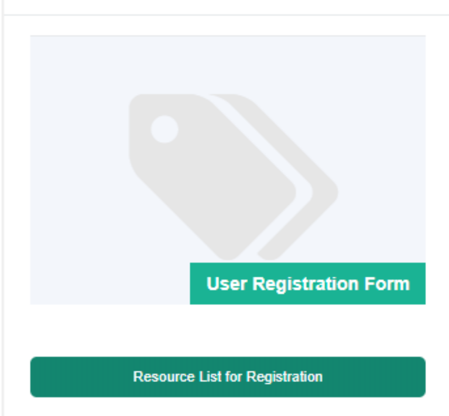
Once your online registration application has been submitted, print a hardcopy for your reference. You will receive a system registration notice to your email account. The nominated staff members receive the online registration and will contact you to make an appointment to discuss your needs and training requirements.

7. Which email address is used to notify staff about an online registration submission?

ACLS uses the ***Contact Us*** *address. The* ***Contact Us*** *email is in the footer of the page. However, ACLS also allows the online registration request to be received by multiple receivers. The multiple receivers can be set up through* ***System Settings -> Email Receivers.***

8. How do we set up a resource of interest in the online registration process?

You set up a resource list for online registration through ***Resource Manager.*** *This information helps the staff receiving the registration requests in their decision making.*



If the system detects you have set up a resource list for online registration, it automatically adds a resource page to the registration process.

9. Is it possible to include an Ethics Number Entry in online registration?

An Ethics Number is required for certain medical and medicine labs. Should you wish to set this up, please contact us for further assistance.

10. How can we set up an account entry field in online registration?

Four fields are available at ***Configure System,*** *so you can set up a maximum of 4 account fields.*

For example, if you set "RegAccountField1" as "Ledger Codes", and leave the other 3 blank, then the user only sees the one field of "Ledger Codes" in the account information entry form at registration.

11. How can we set up user photo upload in online registration?

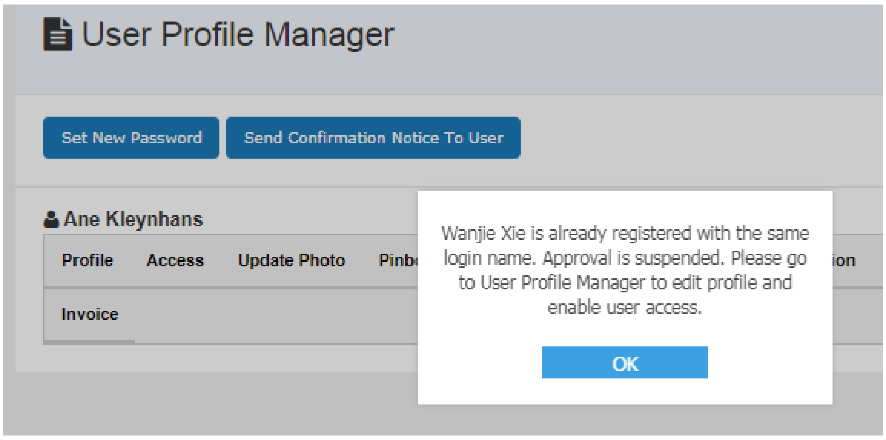
The control parameter is at ***Configure System,*** *tick the checkbox of* ***User Photo For Reg*** *to enable the user photo upload in online registration.*

12. Are there any photo sized restrictions?

No, users can upload any sizes of the photos and system re-sizes automatically.

13. When I approve user registration, I am told by system that user is already registered, why?

The following screen print indicates that the same user email address was registered already. You can search user with the full range to reactivate or update user profile.



7.3 Booking

14. A user cannot make bookings, I checked his profile, seems everything is correct, why?

Most likely, the user has not been given an account. System won't grant the users to book unless the billing account (even it is a dummy account) is linked to the user profile.

15. When I open resource calendar, calendar shows up a blank page or distorted page, what should I do?

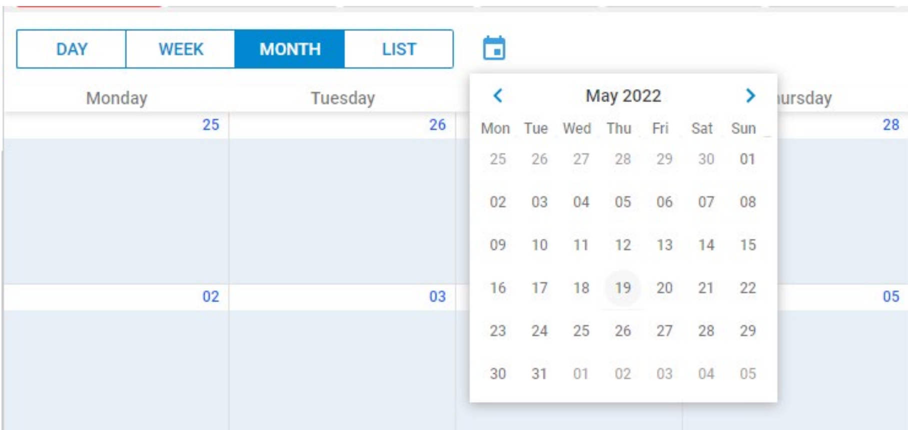
This is caused by the browser cache, please clear the browser cache.

16. I tried to cancel my bookings but was unsuccessful. What should I do?

You do not have permission to cancel bookings one day in advance. Contact staff members for assistance in cancelling such bookings.

17. How can I move to different days quickly other than clicking on previous/next button?

Add-on calendar is implemented to calendar page as shown below.



18. I am unable to make bookings as I wish. What are my booking limitations?

You can see your booking quota on the right side of booking calendar page.

19. **Can I book a resource for a service and make it known to users?**

    Service Booking *calendar is only available to staff members. After a service booking is made, ACLS automatically generates a notice to the relevant users informing them that their bookings are cancelled due to service of the resource.*

20. **I need to cancel a booking as the user who booked the session cannot attend. What should I do?**

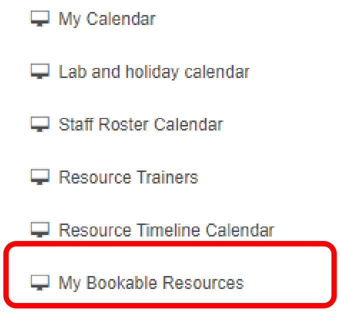
    First step: cancel the user booking through user/approval booking calendar or service booking calendar.

    Second step: cancel the just-made service booking so the time becomes available for booking again.

21. **Why can't I find a resource in the drop-down list to make bookings?**

    You need a training certificate to be able to make bookings with a resource. Go to ***Dashboard*** *->* ***My Training Records****, you can check your records and find the trainers for the resource.*

    If you do have a training certificate, then click on ***My Bookable Resources*** *on* ***Booking Tab*** *to clear the system cache and reset the booking resource list.*



22. **Why can a user make bookings for a resource even without training certificates?**

    Verify the settings in ***Resource Manager*** *and ensure that* ***Training Certificate*** *is set to* ***Required.***

23. **How does the booking reminder work?**

    Simply tick the ***Reminder*** *box, and ACLS automatically sends out an email reminder to users two (2) days prior to the booked sessions.*

24. **I want to change the reminder to be sent one day prior to the booked session. Can the reminder days be changed?**

    Yes, go to ***System Setting -> Configure System,*** *change the parameter* ***AdvBookingReminderDay*** *value from 2 to 1, or any number you wish.*

25. **How does the booking confirmation notice work?**

    Simply tick the ***Booking Confirmation*** *box, and ACLS automatically sends out an email notice to users immediately after bookings are made. If you don't see the box, then the system sends you the confirmation by default.*

26. Why do I receive a booking confirmation without my consent?

By default, the system generates a compulsory booking confirmation. So, you receive confirmation emails by default. Please contact staff members if you wish to disable this.

27. Why can't I cancel training bookings made for me?

Only the staff member making the training bookings has the authority to cancel the booked sessions.

28. If a user make bookings in error, is there a way to correct this for past bookings?

*Go to **Data Logbook Manager** to edit or delete retrospective bookings, and to add new bookings for the user (available to staff members only).*

29. How can I print the booking calendar in a printable format?

*Depending on which view you choose, list, day, week, or month view, click on **PDF Icon** button to generate a PDF format of the calendar.*

30. If we have many resources for booking, can we display them in the order of resource groups?

*Yes, you can. First, make sure that you set up resource groups through **Resource Manager**, then you just need to uncheck the box for the parameter **Booking Display All** in **Configure System.***

31. How can we restrict general staff from accessing all the booking functions before they are trained?

*What you need to do is to turn on **Restrict Bookings To General Staff** through **Configure System.***

This only applies to the General Staff group. Any staff belonging to a manager or admin group won't be subject to this rule.

If your lab is relatively large and comprised of multiple units, then it is recommended that you should turn this ON, so that only the staff in each unit can book their local resources. In this case, staff in other units are treated as normal users and will have to undertake a kind of user induction and training program before they are allowed to book resources outside their own unit.

32. Some users are given a calendar that only shows 10 days in advance. Other users get 7 months, for example. How do I control this?

*All booking controls are defined in the training certificates. There are two ways to check certificate settings, via **User Profile Manager**, or via **Training Manager.***

33. The day and week view of the calendar for one instrument starts at 10:00. The calendars for two other instruments start at 00:00. How do I control this?

The control is in training certificates, and nothing to do with the resources.

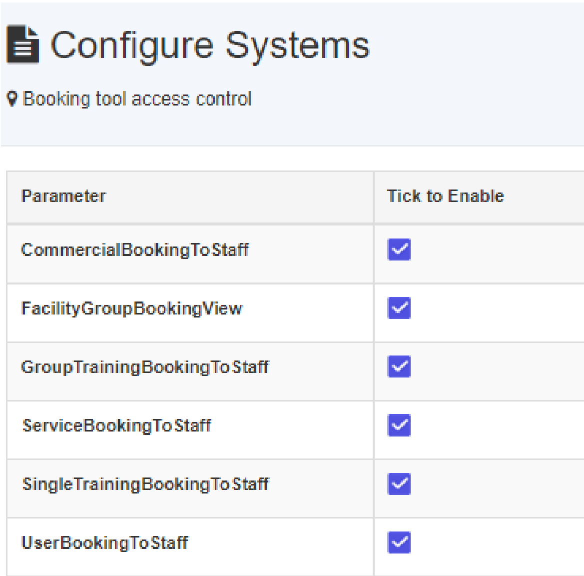
For example, if you set James as beginner on equipment #1, and if that certificate setting is from 9am to 5pm, then James can only book equipment #1 from 9am to 5pm.

34. Being a staff member, can I book for other users?

*Yes, you can do this through **User Booking Calendar**.*

35. Can I disable some booking functions as they are not relevant to us?

*Yes, you can. Go to **System Settings -> Configure System**, then click on **Enable Various Booking Calendars.** Check the functions you wish to make available to staff and users.*


Configure Systems

Booking tool access control

Parameter	Tick to Enable
CommercialBookingToStaff	☑
FacilityGroupBookingView	☑
GroupTrainingBookingToStaff	☑
ServiceBookingToStaff	☑
SingleTrainingBookingToStaff	☑
UserBookingToStaff	☑

36. What is the week repeat booking?

The week repeat allows you to repeat the booking on the same day of each week. For example, if you book 2pm to 3pm on Monday, then the system books the same time on all the following Mondays for you.

37. What is the month repeat booking?

The month repeat allows you to repeat the booking on the same date each month. For example, if you book 2pm to 3pm on 22/8 and 23/8, then the system books the same time on the 22 and 23 each month.

38. Is there a time limit for the repeat bookings?

Yes. This depends on your booking permission: if you can book up to 60 days/period, then the system repeats the bookings over the next 60 days.

39. What is iCal?

iCalendar (iCal) is a computer file format that allows Internet users to send meeting requests and tasks to other Internet users, via email, or sharing files with an extension of .ics.

iCalendar is used and supported by a large number of products, including Google Calendar, Apple iCal, GoDaddy Online Group Calendar, IBM Lotus Notes, Yahoo! Calendar, Evolution (software), Lightning extension for Mozilla Thunderbird and SeaMonkey, and partially by Microsoft Outlook.

40. How do I turn off the compulsory booking confirmation for a resource?

By default, the system switches on booking confirmation to all resources, so that users and staff receive a booking confirmation with the attached iCal files.

*However, you can switch off the compulsory booking confirmation. Go to **Resource Manager** and simply uncheck the box **Compulsory Booking Confirmation.***

41. I can open and save the iCal files to Outlook, but how can I share this with a web calendar such as Gmail?

You must import the iCal file to the web calendar.

42. Can I set week view as my default calendar view instead of month view?

*Yes, go to **Calendar Settings** to make the change.*

43. The system sets the time interval to 15m, why can't I book from 4:30pm to 5pm today if the current time is just past 4pm, for example, 4:10pm?

*The calendar sets the blocks in one-hour units. In this case, the current time is 4:10pm, so the calendar is blocked until 5pm. However, you can allow current hour booking permission by changing the parameter **Enable Current Hour Booking Change** through **System Settings** -> **Configure System**.*

44. Can I set different booking time intervals for different resources, for example, instrument A for one hour, instrument B for 15 minutes?

*Yes, through **Resource Manager**, you can set a minimum booking unit for each resource for the interval or timescale of 5 minutes, 15 minutes, 30 minutes and 60 minutes (one hour).*

45. What is the difference between Booking Calendar and Data Logbook Manager?

***Booking Calendar** is used to make the future bookings, while **Data Logbook Manager** handles the retrospective bookings.*

46. On user booking calendar, it seems that the maximum hours booked for a user can exceed their group time allocation.

On user booking calendar, staff could book for users without the limits of the booking quota.

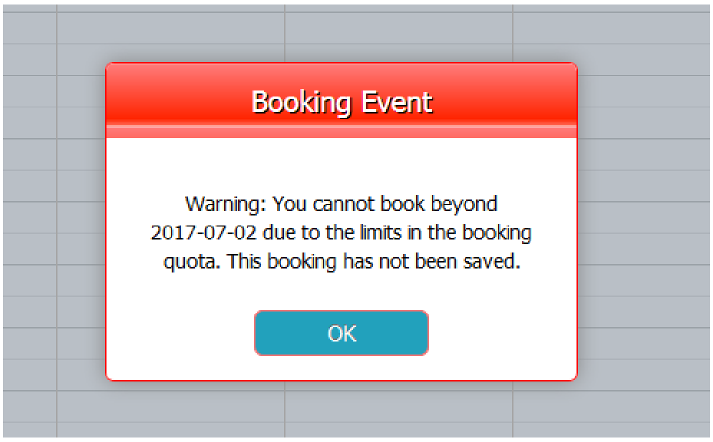
47. How can I make a retrospective service booking in the past?

*You need to go to **Data Logbook Manager**, choose **service booking** from the drop-down list under User. However, you cannot use this service booking to overwrite other bookings that were implemented in **Booking Calendar.***

48. Can I change an "approved" booking to "unapproved"?

No.

49. What does system tell me if I see the following booking error message "you cannot book beyond a date due to the limits in the booking quota"?

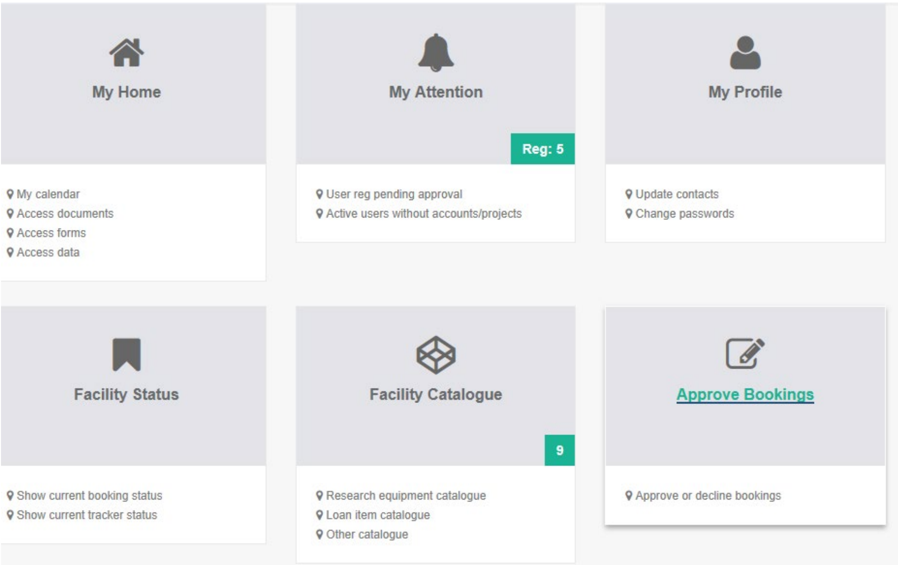


The message means that user's certificate only allows them to book no more than 2 days in advance. Please check training certificate settings.

50. How can I approve bookings?

There are 3 ways to get an unapproved booking.

- Direct approval link in the email
- Approve the bookings on Calendar page
- Approve the bookings on Dashboard



51. What if I decline the wrong bookings but wish to restore?

The only way to resolve this is to make a new booking for the same user.

52. Is there any way of changing the settings so that future bookings can be made more than 3 months in advance?

Yes, you need to change the settings of training certificates to extend the max days/period to more than 90 days.

53. Can I book multiple resources on the same calendar page?

Yes, timeline calendar offers the solution.

54. We run a few hundreds of resources. When I book a lab event, I close all resources for bookings for the lab event time. However, if I want to open a few resources for bookings, how can I do so?

*Only system administrator can do so. Go to **System Settings -> Configure System -> Booking Correction** to cancel the lab event bookings.*

55. How can I receive booking cancellation emails when someone cancels a microscope booking so I can book the cancelled time?

*Yes. At **Information Panel** on calendar page, you can set up email notification for booking cancellation, so you are able to fill up the bookings. This is handy way to receive the reminder and book the heavily booked resources.*

56. Can you advise why bookings are not working when using phone/QR method but they do work on the computer?

This is mainly caused by incorrect QR codes. Admin can re-generate QR codes for resources.

57. How can I set up permitted booking start time at 8:30am and end time at 4:30pm?

Permitted booking start time and end time is controlled by the training certificates.

7.4 Group Booking

58. Is an email notice automatically sent to the users who are booked for?

Yes.

59. Can Group Bookings be cancelled?

Yes, however, you can only cancel a group booking made by yourself. If you want to cancel a group booking made by other staff, please do so through Service Booking.

60. Are Group Bookings included in reports?

No. A separate group booking report function is added. Hence, group bookings won't be part of reports or invoices. In the current design, group bookings are treated as special bookings. You must manually integrate group booking data into a report if needed.

7.5 Update User Information

61. How can I change my login name and password?

*You cannot change your login name once your registration is complete. However, you can update your contacts and to change password at **My Profile**.*

If you are the administrator of the system, then you can reset any user's password at ***User Profile Manager****. The new password is sent to the user by the system after each change.*

62. I cannot find a particular user using the search function. Why?

Users are separated into three categories: all, active and inactive.

When searching, you need to select the search range. The default is the range of ***all*** *users.*

63. Is it possible to remove user access?

Yes, uncheck the box ***activate user entry*** *in* ***User Profile Manager*** *to end user access to ACLS.*

64. What would be implications for double profiles to the same user?

Sometimes, the same user registers twice over a long period of time, and admin does not check against record properly. System does auto-check against email address to prevent double profiles, however, the user may use the different email address to skip the auto-check. When staff select the user from dropdown list for different jobs, system may pick one out of two profiles, for example, when you set up a certificate to a user, staff may select the wrong profile. As the result, the user cannot book the resource.

65. What should I do if a user has attempted to register an account in ACLS when she already has one?

This user profile is deactivated or inactive in system, simply reactivate her, then delete her reg.

7.6 Update User Supervisors

66. How can I set up supervisors for a user?

Go to ***User Profile Manager****, find the user, and then go to* ***Supervisor*** *tab to* ***Edit User Supervisor****.*

Click on the button and you can add multiple supervisors, but you can only set one of them as the 'default for invoicing' supervisor.

67. What do you mean 'default for invoicing'?

You can compile invoice statements through ACLS. Each invoice statement is raised against a supervisor who is the 'default for invoicing' supervisor.

68. How can I delete a supervisor set as 'default for invoicing'?

You cannot delete or suspend a supervisor set as the 'default for invoicing'. You need to set another supervisor as the default or add a new supervisor as default. Each user must have at least one default supervisor.

69. **Can I set more than one supervisor as ‘default for invoicing’?**

No. In most cases, you can only bill one. If you need to have multiple supervisors for invoicing, please contact us to discuss further.

70. **I have a situation where I need to bill multiple supervisors for one user’s sample job, how can I do this as the system only permits one default supervisor for billing or invoicing?**

Unfortunately, you can only nominate one supervisor for billing. You will need to change the default supervisor through user profile manager before raising the invoice each time.

71. **Can I set supervisor as inactive since the supervisor leaves the organisation?**

*Yes. At **Supervisor Manager**, you can set to active or inactive by ticking the checkbox of **Status**.*

7.7 Data Report and Invoice

72. **How can I generate a billing invoice?**

*There are two ways to generate invoice statements, through **Batch Invoicing,** or click* on ***Booking Invoicing** to produce a printable invoice for each charge to a supervisor according to the booking data or usage log data.*

Click on ***Sample Invoicing** to produce a printable invoice for each charge to a supervisor according to the completed sample jobs.*

73. **What if I make a mistake when creating a sample job invoice?**

*Go to **Find Invoices** and then click on **Cancel Sample Jobs Invoice** to be able to edit a job.*

74. **What happens after sample jobs are taken for invoicing?**

Those jobs are invoiced and closed. They are not available for further editing.

75. **Can we disable invoice statement access to supervisors?**

*Yes, you can. You just need to uncheck the box for the parameter **Invoice Accessible By Supervisor** in **Configure System**.*

76. **We deploy ACLS tracker to track and capture the true usage of research equipment. Can we see the booked hours and tracker hours on the report?**

*Yes. Go to **Report Manager -> Resource Booking Report -> Booking Report By Resources** to see both hours, provided that the feature reports are enabled in **System Settings**.*

7.8 Batch Data Report

77. What are the benefits of using batch reporting tool?

__Batch reporting__ runs all booking reports and usage reports at the one time. Without using __batch reporting__, you would need to run reports one by one for each resource, or each school or organization. __Batch reporting__ improves reporting productivity by at least a factor of 10.

Furthermore, __batch reporting__ runs report-like transactions. In other words, through __batch reporting__, you store the entire report as one transaction record. Any changes to your pricing policy won't have any effect on the prepared report unless you run the __batch reporting__ again with the new pricing settings.

78. What are the differences between batch reporting and Booking/Usage Data Report function?

As explained above, __batch reporting__ runs all booking reports and usage reports at the one time, and __batch reporting__ runs report-like transactions.

Booking/Usage Data Report is a manual process that doesn't store results but shows a report at the time you run it.

Over years, __batch reporting__ will provide you with an entire history of all resource running reports.

79. Why are there two kinds of data reports: Booking Reports and Usage Reports?

Regardless of your system configuration, Booking Report uses the booking data for reporting and billing, Usage Report uses the tracker logs for reporting and billing. __Batch reporting__ produces two kinds of reports so that you can compare them against each other: booking vs usage.

80. How can we access the generated reports?

Go to __Report Manager -> Resource Batch Report__, click on the __Access Batch Data Reports__ button to access. The system sorts the reports by year index.

Furthermore, the system provides different options for sorting to assist you with your reporting needs.

81. What do we need to prepare before running batch reporting?

It is good practice to check booking and usage data integrity before running __batch reporting__ each month, to make sure the booking data and usage logs are correct. You should go to __Data Logbook Manager__ to check the usage logs and correct those picked up by the system. The wrong logs are highlighted in red.

If there are any errors, you can re-run the reports anytime.

82. What happens when the system is running batch reporting in the background?

During the short period of time that __batch reporting__ is running, the system shuts down the reporting and invoicing modules so no others can run the reports and invoices at the same time.

When the process is complete, the system resumes reporting and invoicing modules.

83. How can I access the EXCEL files generated previously?

*Click on **Report Manager -> Archived Excel Files** to access, then click each link to expand for details.*

84. Can the invoice statements be PDF instead of HTM?

Not available yet. A PDF converter will be introduced to ACLS enterprise service.

85. How can I search for the invoice statements I want?

*A new search tool is provided through **Invoice Manager -> Find Invoices**. Simply enter part of a supervisor's name or invoice number, and the system shows the search results for you.*

86. What if I change the data and need to redo the invoices?

*You just need to re-run **batch data invoicing**. The system only keeps one valid invoice statement for each supervisor per month.*

87. What if I want to change the format of an invoice statement?

Please contact us to discuss this further.

7.9 User Training & Certification

88. How do I register user training certificates?

*All listed trainers (staff members ONLY) can issue certificates of training to users. Click on **User Profile Manager** and open the user profile page. Go to **Certificate** tab, **Edit User Certificates.***

A trainer can only issue a certificate for the resource for which he/she is certified as a trainer.

89. Why can't I find the trainer from the drop-down list in Training Manager?

Only staff members (minimum level of general staff group) or users being appointed as user trainer group, can be granted trainer access.

90. Who has authority to set up trainers and certificates?

The System Administrator, administrative staff and lab managers can edit and add trainers and certificates.

91. How do I know I am a trainer for certain resources?

There are 4 places you can check for this:

- ***Dashboard -> My Profile***
- ***Booking -> Resource Trainer***
- ***User Profile Manager -> User Profile -> Trainer***
- ***Training Manager -> Trainer List***

92. How do I see who has been issued with training certificates in a particular period?

*Go to **Report Manager -> Training Certificate Report**, you can compile a summary over a month or a period.*

93. How do I see who lost training certificates in a particular period?

*Go to **Report Manager -> Training Certificate Report ->Expired Certificate Report**, you can compile a summary over a month or a period.*

94. How can I find out the users whose training certificates are expired in the selected month?

*Go to **Staff tab -> Utility -> Reports -> Training Certificate Report**. Alternatively, you could find out the expired certificates during the selected period.*

95. How can I find out last booking of the certified active users?

In Training Manager, a new function is implemented to capture the last booking of the selected resource certified users. The result table highlights the last booking in red that is earlier than 12 months up to date.

96. How can I check last bookings of the selected resource?

*You might want to check the last bookings of the certified users, go to **Training Manager -> Last Booking of Certified Users.***

97. In Training Manager, the drop-down list only shows about 6 instruments, and we have quite a few more than this. What have we done wrong?

*Please check the operation status. Only **Active and bookable** instruments can be set up for trainers and certificates. Go to **Resource Manager -> Booking Resource.***

98. I want to give a resource training certificate to a user; however, it does not appear on his list of certificates when clicking on Edit User Certificate, what do I need to do about this?

*The reason for this is you are not listed as a trainer for the resource. Go to **Utilities -> Training Manager** to set up a trainer.*

99. The staff is set as the equipment trainer. When he goes to user profile, why can he not see the certificate in Edit User Certificate as show below?

The possible cause is that either you haven't set up the training certificate, or the certificate is disabled.

100. I'm trying to find out how to get a list of certificate holders for a particular piece of equipment, so I know who has booking rights and who doesn't. Where can I find this?

*Go to **Utilities -> Resource Manager**, select the resource and click on 'certified user' to see the user details.*

7.10 Register Forms and Documents

101. What is Form Repository Manager?

This provides a form repository registry to the labs. It can centralize the storage of the signed induction/ safety/ OHS/ access/ subscription procedures, forms and papers electronically. We recognize the need to record and archive those documents over years, so with Form Repository Manager, users and staff can easily track and access the form records.

102. How does Form Repository work?

The operation is easy to understand and straightforward. You can upload any number of documents (PDF only) to an individual user.

*Furthermore, staff can access the recorded forms on **Dashboard,** and each user can access their own forms and documents when they logon to ACLS.*

103. What if I want to restore removed forms?

*Click on **Deleted Form Records** to restore. However, you can only restore the forms that have been removed within the last year.*

104. How can I set up multiple sub-folders for general documents?

You can add, edit, or delete sub-folders up to 3 levels after the root directory. Click on 'Add/Edit General Document Sub-Folder' button to commence. The system clearly shows the already-created folder hierarchy.

The system supports 3 operations: add new folder, edit the existing folder, and delete the unwanted folder if there are no files in the folder.

105. What documents should I upload as general documents?

Examples of documents for general access are lab operation policy, safety work requirements, induction procedures, instrument and software guides, etc.

106. What should I upload as resource documents?

Resource documents are grouped per resource. Examples of documents are instrument operation guide, tutorial materials, etc.

107. Should I upload resource maintenance contracts, or service agreements as resource documents?

*No, you should not. **Resource Contract Depository** will be provided in the future.*

108. What is the maximum file size for upload?

The maximum size is 2GB per file.

109. How can I view the history of deleted files?

*You can view the records by clicking on **Deleted Document Records**. Even if you can see the history, you won't be able to recover the deleted documents.*

110. What is the difference between documents and forms?

There are two categories of documents: general and resource. But the forms are linked to users.

7.11 Support Tickets

111. What if the request is closed by staff?

The system does not allow any further responses to closed requests. If you wish to re-open any request tickets, please contact the system administrator.

112. What happens after the system receives a request submitted by a user?

The system sends an email notice to the 'Contact Us Email' defined in the system settings. If you wish to have more staff receiving the notices, please go to ***Email Receiver*** *to set this up. When staff respond to the request, the system also sends a short notice to the user who submitted the request.*

7.12 Track Samples

113. What if I have added the wrong method to the sample job?

You can delete the method from the job if the method is not checked in.

114. How do I collect all the job data for reporting?

ACLS provides a tool to facilitate the handling of work. Select the month, year, and the option.

115. What is the size limit for file uploading?

It is 2GB. For larger files, the use of FTP is recommended. Contact the ACLS System Administrator.

116. What kind of files can I upload?

ACLS supports the following file formats when uploading:

- xls/xlsx
- doc/docx
- pdf
- zip

117. How do I edit jobs with the same job number?

ACLS comes with ***Configuration*** *->* ***Auto-Correct Job No*** *tool. By running this tool, all the incorrect jobs are restored with their correct job number.*

118. How do I edit a finished job?

If the job is invoiced, you must cancel the invoice first to release the job. If the invoice for the job is not completed, you can ***Reopen Job To Edit.*** *However, this is only available to the ACLS System Administrator.*

119. How can a customer or user download results through the system?

Click ***Access Sample Reports*** *on* ***Dashboard*** *to go to the download page. ACLS verifies the user details and displays the records and the download links according to the year index.*

7.13 ACLS Tracker

120. What if there is no communication between the tracker and the ACLS server?

A loss of communication between the tracker and the ACLS server could be caused by several reasons:

- Loss of network
- ACLS server down
- ACLS server rejecting tracker request due to the incorrect server IP configuration
- Network Firewall

The tracker has a built-in feature that always detects connection with the ACLS server.

121. Why does the tracker open the 'Staff Authentication Page' on user login?

If you set the training certificate of the resource to require onsite assistance, the server asks the staff on login to ensure the user is under supervision. This applies to those users under training certificates, as they won't be able or allowed to perform the experiment alone.

122. What is the purpose for the tracker reload button on tracker app?

This is designed for re-run the app if the app connection to the web server is lost.

123. What can tracker do if users always forget to logout?

Auto-logout feature is available for tracker, Admin just need to enable this feature and set up the auto-logout timer.

124. What is the booking first policy for the tracker?

If you turn on this booking first feature, tracker checks user booking records before permitting his login, no booking and no login.

7.14 General

125. What could be the cause if I cannot see the web page properly?

Most likely, this is caused by the history, temp files and cache stored in the browser. You can take the following actions to reload the page:

- Press ‘ctrl’ key plus the refresh button of the browser to force reloading of the page
- Delete all history and temp files

126. How do I send short notices to all supervisors?

*Go to **Broadcast Messages**, select all supervisors from the drop-down list. After typing in the subject and message content, click on **Send Message** to complete.*

127. Can I set up a resource group without assigning any resources?

Yes, you can. ACLS checks the availability of resources in each resource group when listing the available resource groups for action.

128. Can I clone a resource or tool?

Yes, go to Resource Manager to clone.

129. Can I delete a resource group?

No. You need to un-link the resource from the resource group, in other words, set it as non-bookable.

130. What if I cannot find the staff to nominate the ownership of a resource group to?

Staff who are granted equipment supervisor category or above can be nominated as owners.

131. What is the difference between resource group owners and trainers?

Owners can set up trainers. To issue training certificates to users, the staff must be listed as the trainer. Owners cannot issue training certificates to users unless they are listed as a trainer.

132. Can the owner set himself as the trainer?

Yes.

133. What is the explanation for Bookable and Operation Status listed in resource configuration?

***Bookable** and **Operation Status** are independent of each other.*

Here is an explanation:

- If bookable, then it is open for booking and shows up when making bookings and viewing bookings; if not bookable, then it does not appear on the booking charts.
- If ‘status’ is set to active, it is available for setting up training certificates and trainer and is also listed in the sample tracking module. If ‘status’ is set to inactive, bookable is turned off at the same time.

134. How can I set up 3 parameters for each user group in Group Manager, Max hours/day, Max Days/period and Max hours/period?

An explanation and examples are as follows:

- Max hours/day: 3, means users that belong to this group through their training certificate, can only book a maximum of 3 hours per day
- Max Days/period: 7, means this user can only book from now up to 7 days ahead. No bookings can be made beyond 7 days from now
- Max hours/period: 6, means this user can only book 6 hours in total from now up to 7 days ahead. This applies from the current day up to the end of the next 7 days. If a user booked 3 hours yesterday and left 3 hours for an additional booking, then these 3 hours are considered as a past booking from today, and he can book a maximum 6 hours again.

Furthermore, the relationship of the 3 parameters is explained below:

- Max hours/day: independent
- Max days/period: independent
- Max hours/period: you need to consider the two parameters above logically, in the above example, Max hours/period shall not exceed 21 hours, ie. 3 hours x 7 hours.

135. I cannot find users in the drop-down list, why?

*If a user has not accessed ACLS for a period, ACLS deactivates the user based on the settings in **Configure System**. Please search for the user to check their access status.*

136. How can I replace the system banner, invoice logo, and terms and conditions for online registration?

*Please refer to **Upload System Files** for details.*

137. How do I check ACLS web portal access information?

*Go to **Configure System**, click on **Access Records** button to check the last 100 access records.*

138. How does the scrolling text announcement work?

*Go to **System Settings -> Announcement - Scrolling Text**, enter the message. Please note that messages must be completed within one paragraph and a single quote is not accepted. Remember to select the **Enable Scroller** option before saving.*

When it is set up correctly, a scrolling message bar shows up as below:

139. How does the popup message announcement work?

Like the scrolling text setup, when it is set up correctly, an announcement popup message window displays when a user logs in.

140. What are the general steps required to set up ACLS for the very first time?

The system is delivered with one default setting for each function.
You need to perform the following tasks to set up the system:

- Account Manager: Only one default account

- Resource Manager: Only one default resource
- Group Manager: Only four default groups
- School/Org Manager: Only one default school
- Resource Login: Only one default for example

141. We have ACLS configured for booking only. Why do we need tracker installed over the resources such as instruments?

The ACLS tracker provides you a further safeguard for the operation of instruments. For example, without training certificates, users cannot access the instrument.

142. Why do we need to set up different receivers?

If the staff member in charge is away for a period, then you can easily allocate other staff members to take over the work. Again, you are also able to set up multiple receivers instead of one.

*Go to **System Setting -> Email Receiver** to set up.*

143. How can we correct incorrect tracker logs?

*This handy tool in **Data Logbook Manager** makes the usage log data correction much easier for staff members. This tool only applies when you run ACLS Client Logon Program on resource computers. If there is incorrect log data, either missing login or missing logout for each log, the system can pick this up and run the error fixing function for you automatically. The system calculates the longest period (on the same day) between the last session and next session depending on the nature of the error and then adds the missing login or logout to generate a complete usage log.*

144. How can we set up a home page link in the system footer so users can go back to the organization page anytime?

*Go to **System Setting -> Configure System**, change the parameter **Home Page Link** to point to your home page.*

Home page link is particularly helpful to users if you have multiple ACLS operations in your organization, then clicking on "Home" can direct users back to the gateway easily.

145. Can we check the sent email message records?

*Yes, go to **System Setting -> Email Logs**. You can search emails by any keywords that are part of the receivers' name and email address, senders' name and email address, subject, and resource.*

146. Do I have to manually type holidays into the calendar each year?

*Not necessary. You can click on **Copy Public Calendar to 2018** button to transfer everything from this year to next year. However, you may have to tidy up the calendar to remove those that don't repeat.*

147. Currently the query emails come through my email address, but I am leaving the organization soon. Is it possible to change this?

Yes, go to ***System Settings -> Configure System****, change the parameter* ***Contact Us Email*** *to the new email address.*

148. What is the difference between General Staff and Equipment Supervisor?

Equipment Supervisor is treated like general staff, with accessing power a level below lab manager. However, the equipment supervisor can (staff CAN NOT) set up a training certificate and trainer to the resource he is listed as trainer for. In other words, the equipment supervisors can manage their own resource training set up without the need to contact admin.

149. Where can we find the Terms & Conditions?

On Dashboard, you can access Terms & Conditions. The details of Terms & Conditions can be seen on the fly modal window.

150. Can we remove or stop the ongoing induction process to the user?

Yes, go to user profile, and cancel induction.

151. When I approve the induction process to the user, could I re-do after my approval is granted?

Yes, you can roll back.

152. How can I find out who cancel the consumable order?

You could check the records under Change consumable Order feature.

153. What is MoxyBot service?

MoxyBot service delivers the 24x7 lab knowledge bot service that is very handy, interactive to the users working at lab after-hours or weekends..

8 Enterprise Service

ACLS node service has been built and run as a single node and enclosed system. The demand to deploy ACLS as an institutional-wide service is available to meet enterprise service demands and requirements. The ACLS Enterprise Solution provides an institution-wide service with the flexibility to maintain customized control to meet the individual lab demands due to the differences in research and science.

- SSO service: support Azure and OKTA SSO
- Uni-wide catalogue service: link to all ACLS instances on campus
- WHS service: provide the two-steps document approval and document declarations integrated with ACLS instances
- Node business intelligence (BI) service: deliver a centralised report for all ACLS features
- Uni-wide user registration service: provide a uniform registration process
- API service: connect ACLS data to Microsoft Power BI

9 Appendix A – Modification for ANFF-MCN

ANFF stands for Australian National Fabrication Facility. Customization has been done since 2010 according to the requirements provided by the Melbourne Centre for Nanofabrication (MCN).

This appendix intends to provide an operational guide to the customized ACLS for ANFF.

9.1 MCN: Modification Background

MCN modification has been developed for the cost centre or business model running at MCN.

A provisional pricing schedule for MCN, in accordance with MCN documentation, is indicated below in Table 1.

Table 1: Pricing regimes for basic access to MCN

The key for the pricing schedule is listed below and correlates with the user category

Support Provided	PhD Student	University/ PF Researcher	Industry User
Unassisted	A	B	C
Assisted	D	E	F

Basic consumables are included in the cost price, however, specialized consumables (e.g. substrate materials) or retooling will be charged to the user at cost. Cost for access to flagship instruments is indicated in the top scale of the pricing structure with general lab access and non-flagship instruments (micron scale fabrication) being indicated by the lower end of the scale.

Heavily subsidized access to the resource is available for new device/materials research which requires “proof of principle” in order to secure grant funding. This is strongly encouraged and will be judged on merit by the access committee.

Pricing for public sector researchers is based on marginal costs only. The above charges are subject to review and may be changed without notice.

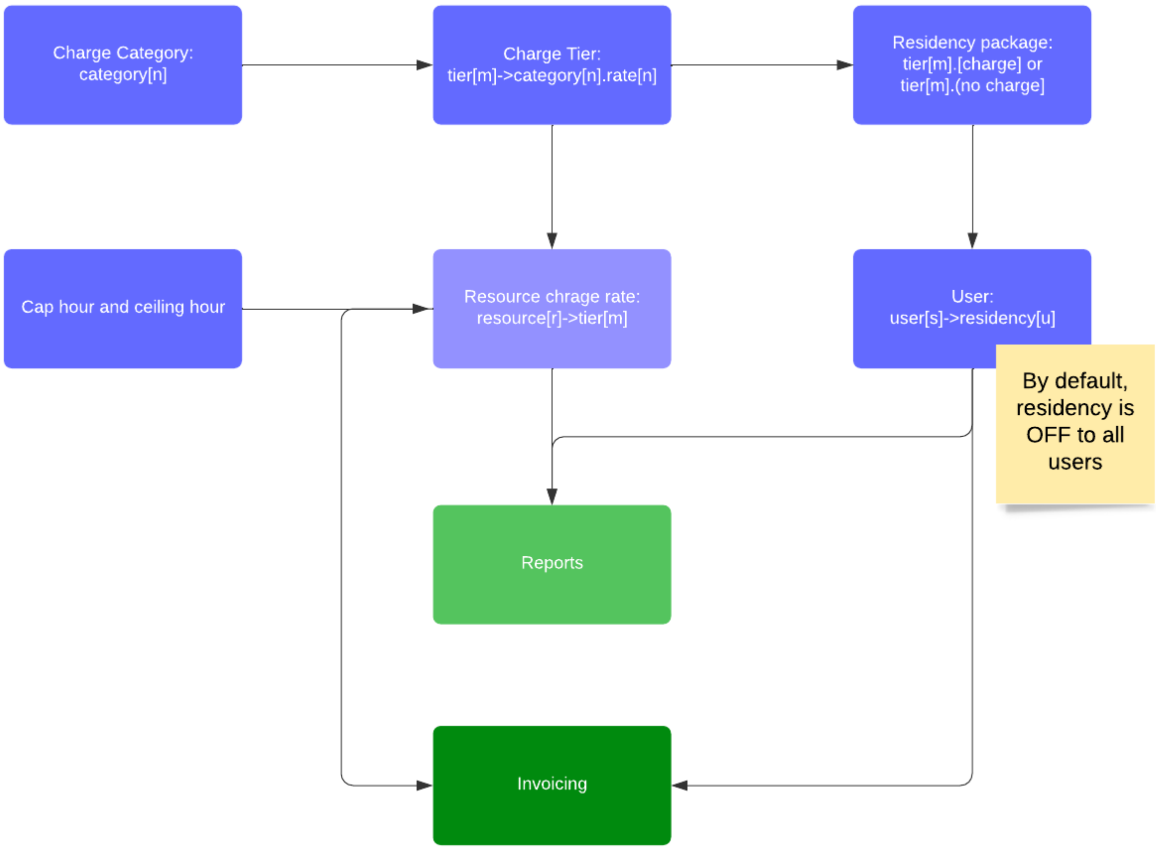
It is noted that to gain unassisted status, researchers must complete application specific and assessed training provided by MCN in addition to all other induction, occupational health and safety and training requirements.

Note that pricing and access for in-kind equipment and facilities at MCN participant organization’s laboratories will be determined by the facility managers at those laboratories.

Table 2: Charges Relating to Access of MCN Facility and Equipment

Equipment	Booking	A	B	C	D	E	F
Cleanroom	Hourly	$ 50	$ 50	$100	$ 75	$100	$150
Bio Lab	Hourly	$ 40	$ 40	$100	$ 50	$ 50	$150
EBL	3-7 hrs				$200	$250	$400
DRIE (per system)	3-7 hrs	$100	$150	$200	$150	$200	$300
PECVD	3-7 hrs	$100	$150	$200	$150	$200	$300
FIB	3-7 hrs	$ 75	$100	$150	$100	$150	$200
SEM	Hourly	$ 75	$100	$150	$100	$150	$200
PVD (EBEAM)	3-7hrs	$ 75	$100	$150	$100	$150	$200
PVD (SPUTTER)	3-7hrs	$ 75	$100	$150	$100	$150	$200
POLYMER SYSTEM	3-7 hrs	$ 75	$100	$150	$100	$150	$200
NIL/EMBOSSING	3 hrs	$ 75	$100	$150	$100	$150	$200
AFM	Hourly	$ 75	$100	$150	$100	$150	$200
CONFOCAL	Hourly	$ 75	$100	$150	$100	$150	$200

In 2022, the new changed business model for charging is detailed in the following flowchart.



9.2 MCN: Set Up Charge Category

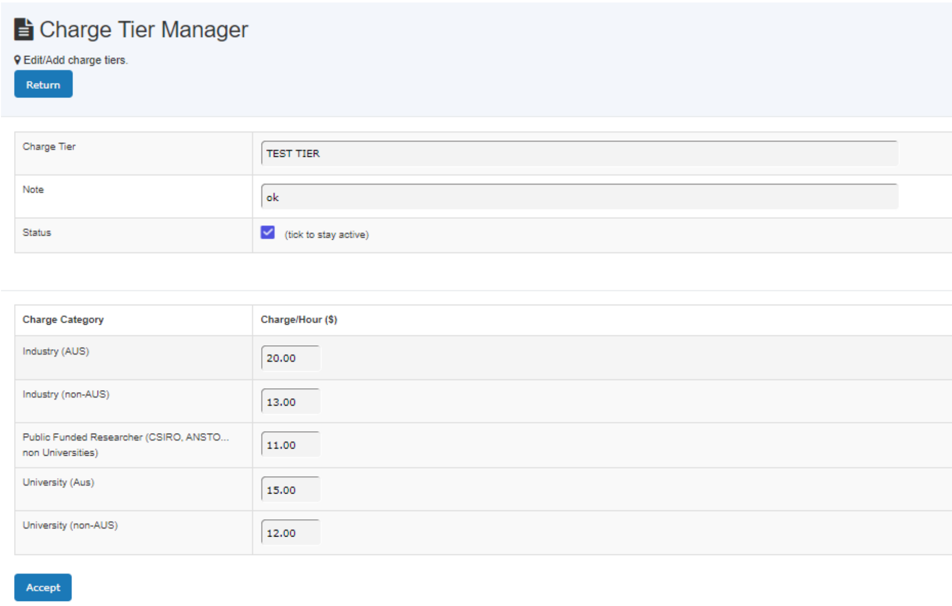
Go to **Utilities -> Charge Category Manager**, where you need to set up your charge category. There is no limit to the number of categories, however, it is highly recommended not to exceed 20 or you may get confused.

9.3 MCN: Set Up Charge Tiers

Tiered Tool Specification to ACLS, allowing for accurate billing for residency package users instead of changing the charge rate per resource that is time consuming, we want to set up tier structure to reduce admin workload.

Go to Charge Tier Manager to set up the tiers. Each tier connects to the assigned charge category.

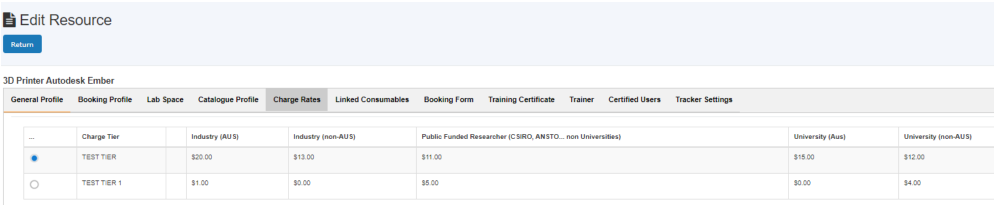
You could enter the charge/hour to each charge category linked to the tier.



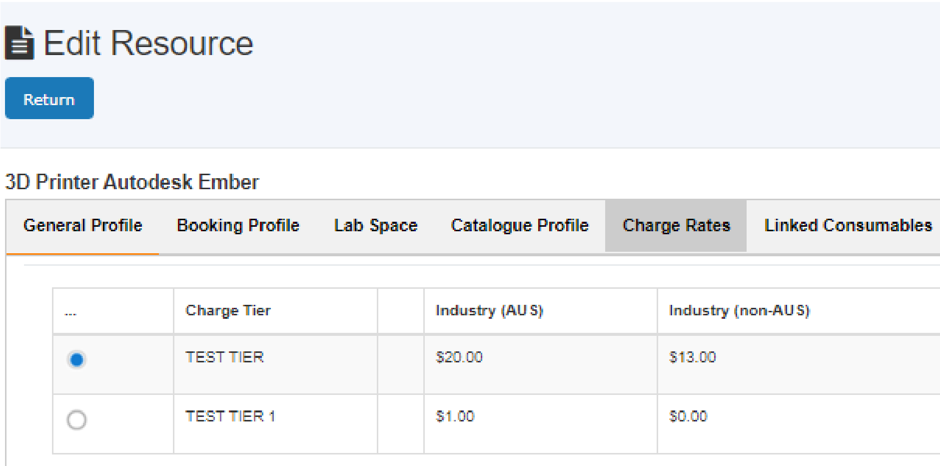
9.4 MCN: Set Charge Tier vs Resource

After setting up charge categories and charge tiers, you need to connect tier to the resource. Whenever you change the charge rate in charge tier and its categories, the changes apply to the resources that connects to the tier.

Go to **Resource Manager -> Charge Rate** to set up.

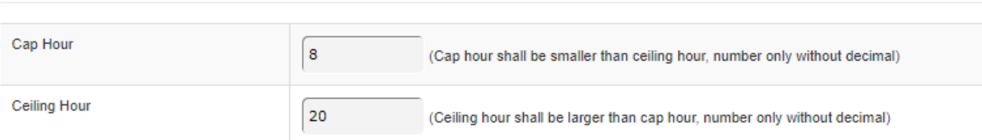


Zoom-in to the above screen print:



9.5 MCN: Set Up Resource Capped Hour and Ceiling Hour

At the same page in **Resource Manager -> Charge Rate**, you could set up the capped hour and ceiling hour (24-hour feature).



If capped hour is set to ZERO, the setting is not effective. If ceiling hour is set to ZERO, the setting is not effective.

Here is how ACLS calculates the chargeable hours against booked hours:

Cap hours is session capped hour feature with the max ceiling hours for implementing the capped charging process. Each ceiling hour defines a cycle time of each session ceiling. If the user books more than the capped hours per session but less than the ceiling hours, he only pays max capped hours. If the booking session is less than the capped hours, he only pays the booked hours.

For example,

James booked TEM#1 from 10am 2/5/2022 to 9am on 5/5/2022. TEM#1 capped hour setting is 8 hours, ceiling hour is 24 hours

Charged hours = first 8 hours (first 24 hours cycle) + second 8 hours (second 24 hours cycle) + third 8 hours (third 24 hours cycle) = 24 hours

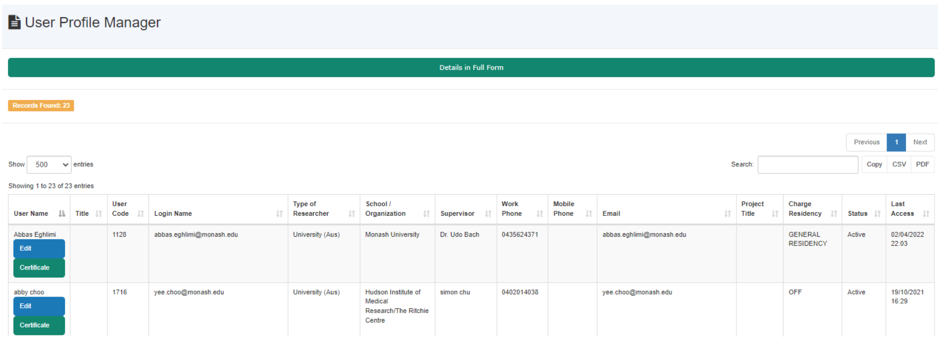
9.6 MCN: Set Up Charge Residency

Charge residency a similar concept to charge tier, but it applies to users instead of resources.

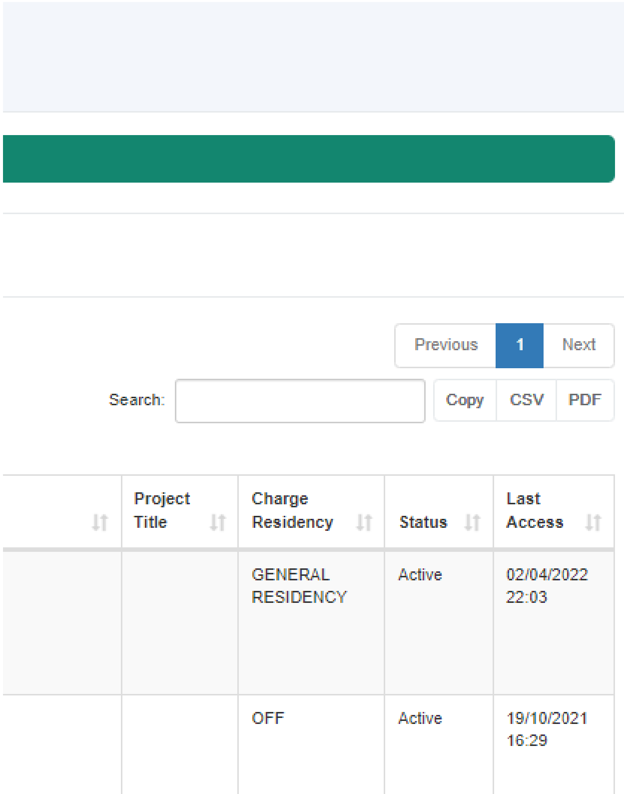
Go to **Staff Tab -> Utility -> Charge Residency Manager** to set up charge residency. Each charge category defines tier to be a chargeable or a non-chargeable.

9.7 MCN: Set Up Charge Residency to Users

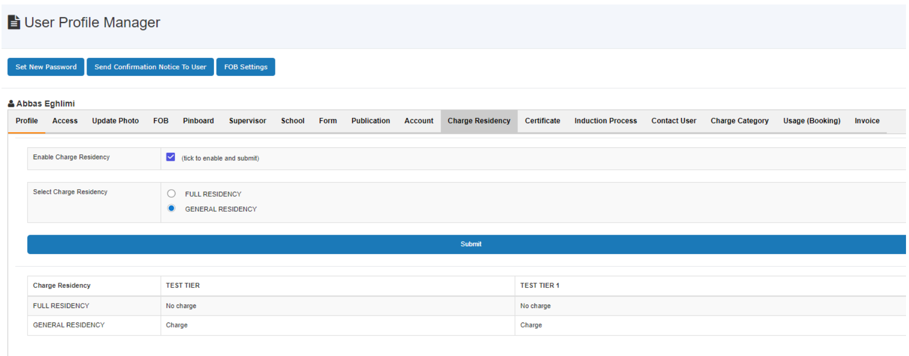
By default, the charge residency is OFF to all users. Admin needs to enable the charge residency at user profile. Charge residency status is added to the user search summary.



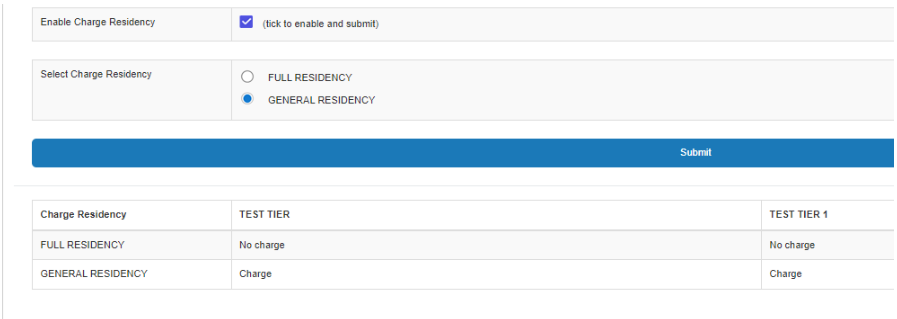
After zoom-in to the summary



Go to User Profile -> Charge Residency to enable and select the charge residency.



After zoom-in to the charge residency page



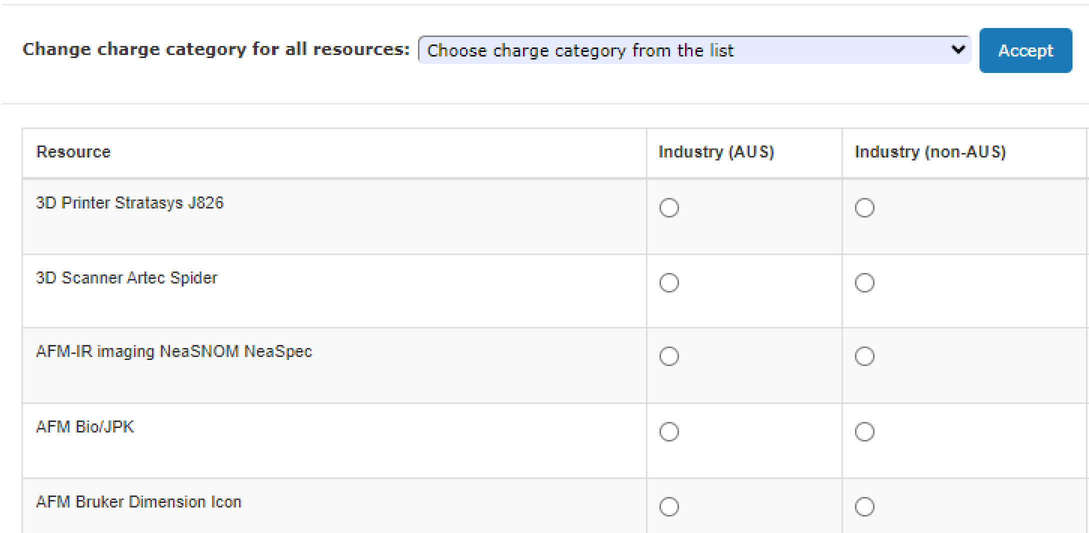
9.8 MCN: Set Up Charge Category to Users

- Charge category does not apply to staff. In other words, staff are free of charge for bookings
- Each user must be given a charge category before they can make any bookings
- Each staff has the power to set up user charge categories

Please note that each charge category is resource vs charge category, which forms a charge category matrix as per MCN price policy.

Go to **User Profile -> User Profile Manager**, then find the user for whom you want to set up the charge category, continue to the Charge Category tab page of editing user profile, then click on **Edit User Charge Category** button as in the snapshot below.

A single selection to set user charge category to all the resources is available so to make the change much easier for admin.



Admin can manually select the resource and choose the category by clicking on the radio button to complete. You can find the charge category list for each user in the field of **Charge Category** on the user's profile page.

9.9 MCN: Automatic Charge Category for new users

Through **Charge Category Manager**, you can map the relationship by clicking on **Charge Category vs Type of Researcher** as below to map the relationship.

Type of Researcher vs Charge Category

Return

Type of Researcher	Industry (AUS)	Industry (non-AUS)	Public Funded Researcher (CSIRO, ANSTO... non Universities)	University (Aus)	University (non-AUS)
Undergra. Student	○	○	○	○	○
Hons Student	○	○	○	○	○
Masters Student	○	○	○	○	○
PhD Student	○	○	○	○	○
Postdoc	○	○	○	○	○
Research Assistant	○	○	○	○	○
Professional Officer	○	○	○	○	○
Academic	○	○	○	○	○
Others	○	○	○	○	○

Following approval of online registration, the system automatically sets up a user charge category for each resource accordingly. However, if there is no relationship established between the type of researcher and the charge category, no actions are taken for auto-rollover.

9.10 MCN: Reports and Invoice Statements

The system calculates the charges and generates the reports with the charge category.

9.10.1 Batch report

The changes are made to the batch report to support the chargeable hours and tier cost structure. The chargeable hours are calculated with the booked hours, capped hours and ceiling hours defined in charge category.

The new concept of chargeable hours is introduced to the batch report for processing capped hour and ceiling hour defined in the charge category as part of tier cost structure.

9.10.2 Invoicing

The changes are made to both batch invoicing and the individual supervisor invoicing to support the chargeable hours and tier cost structure. The chargeable hours are calculated with the booked hours, capped hours and ceiling hours defined in charge category.

The new concept of chargeable hours is introduced to the invoicing for processing capped hour and ceiling hour defined in the charge category as part of tier cost structure.

9.11 MCN: Online Registration

- Registration page

With respect to the standard, split address fields have been added and the **Local Contact** field requires users to select at least one of the nominated local staff.

- Supervisor page

With respect to the standard, split address fields, given name, family name, work phone and email have been added to the new supervisor registration.

- Resource page

With respect to the standard, “Do you want this to be performed by MCN staff?” has been added. The Resource of Interest list can be set up through **Resource Manager**.

- Submission page

With respect to the standard, a confirmation checkbox has been added on the final confirmation page of the registration form. Users must check the box to accept the agreement before completing the registration.

When you click on the **Submit** button, ACLS will send an email notice to the following parties:

- User who made the registration
- User’s supervisor
- Staff nominated

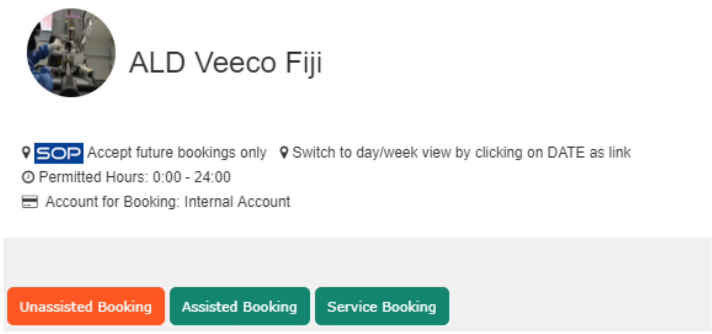
9.12 MCN: Set Up Local Contacts

Go to ***Utilities -> Local Contact Manager***, admin staff can easily set up the list of local contacts.

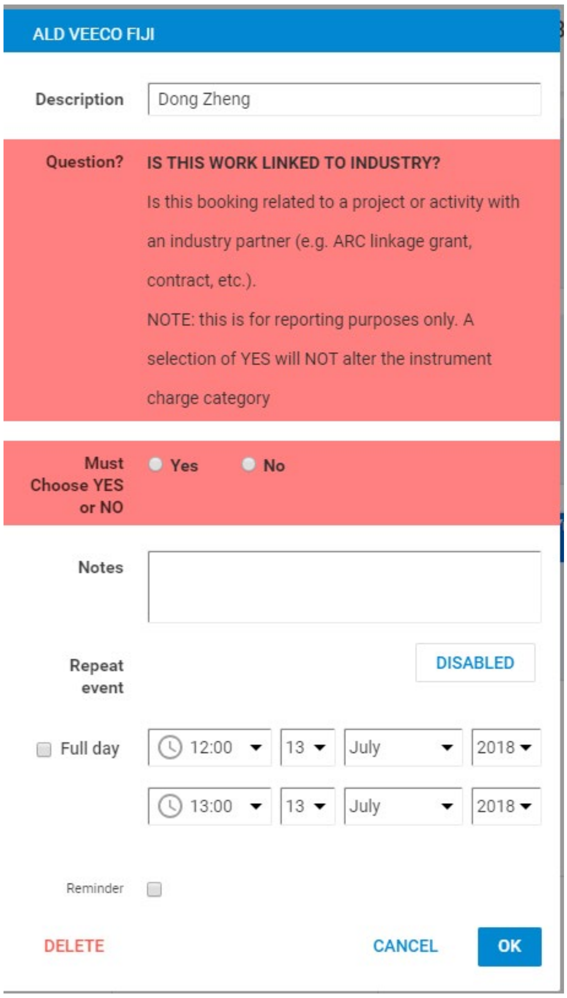
9.13 MCN: Unassisted and Assisted Bookings

The following booking functions are done for MCN to replace the standard Resource Booking, User Booking and Training Booking.

- Unassisted Booking
- Assisted Booking



Regardless of the booking tool, a question field is added to the booking event page, and the user must answer either Yes or No.



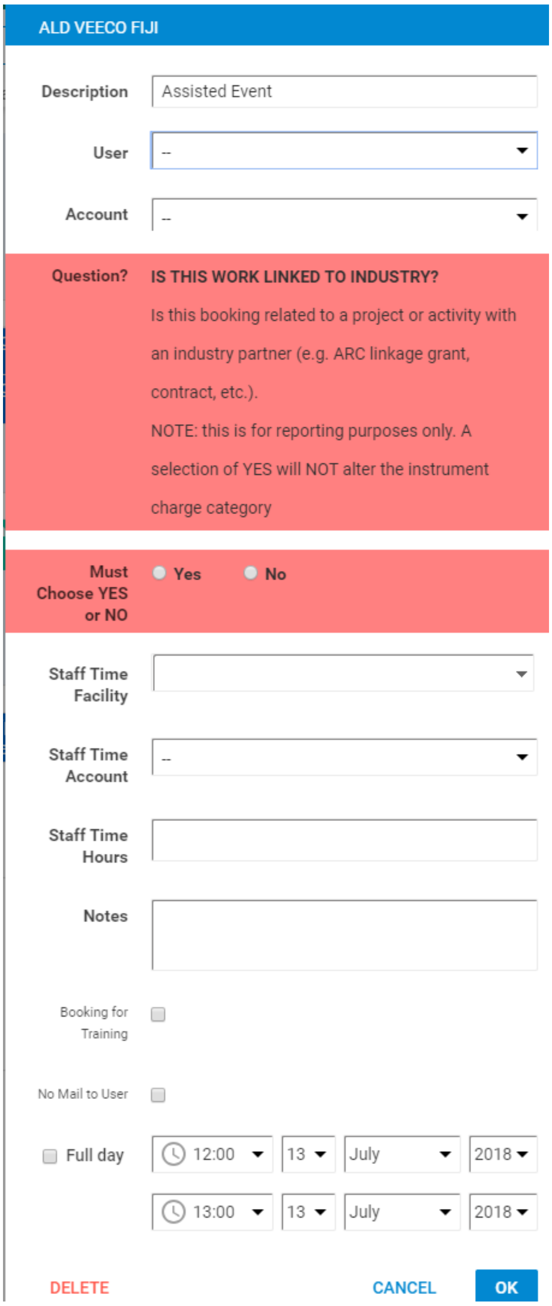
Unassisted Booking:

Unassisted booking originated from facility booking tool. The booking mechanism is the same.

Assisted Booking:

Assisted booking originated from user booking tool. The booking mechanism is similar. Training booking is incorporated into the assisted booking now.

A new booking template is shown below.



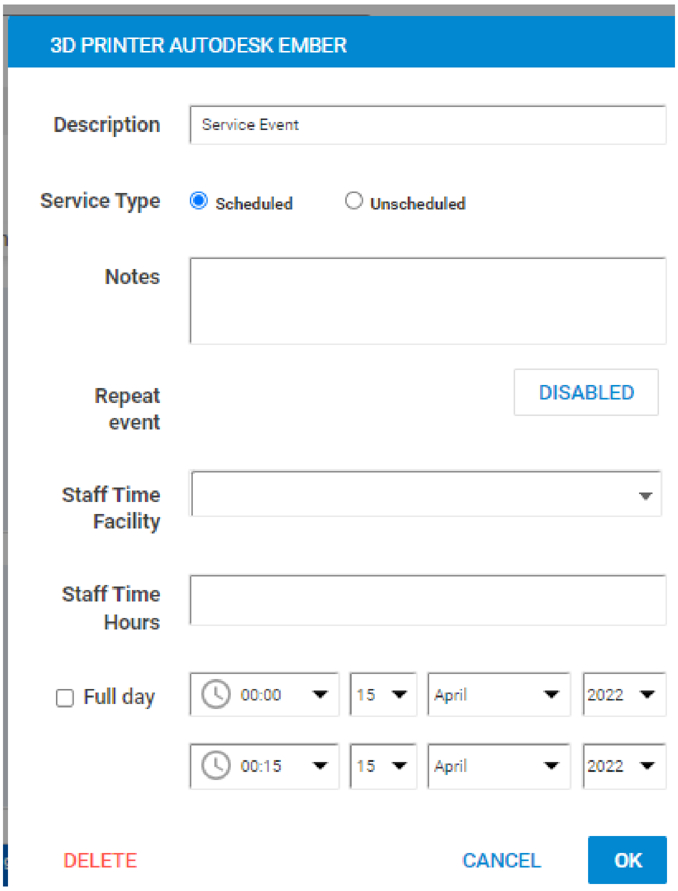
A few new concepts are introduced to this template:

- Staff Time Facility: you need to set up the staff time facility through resource manager.
- Staff Time Hours: if you choose the staff time facility for the booking event, you should select the duration accordingly. The default value is 1 hour.
- Booking for Training: if this event session is for user training, please check the box.

9.14 MCN: Service booking

The requested staff time facility and time are added to the service booking calendar. Staff time facility and time is optional for the service bookings.

Repeat service booking feature is also implemented.



9.15 MCN: Cancel training bookings to cancel the linked staff time booking

ACLS will cancel the staff time booking when the linked training booking is cancelled.

9.16 MCN: Cancel service bookings on assisted booking calendar

Staff are allowed to cancel the service bookings on assisted booking calendar, but not allowed to change the service bookings on assisted booking calendar. To change service booking, staff need to do so on service booking calendar.

9.17 MCN: Cancel staff time bookings to cancel the linked assisted booking

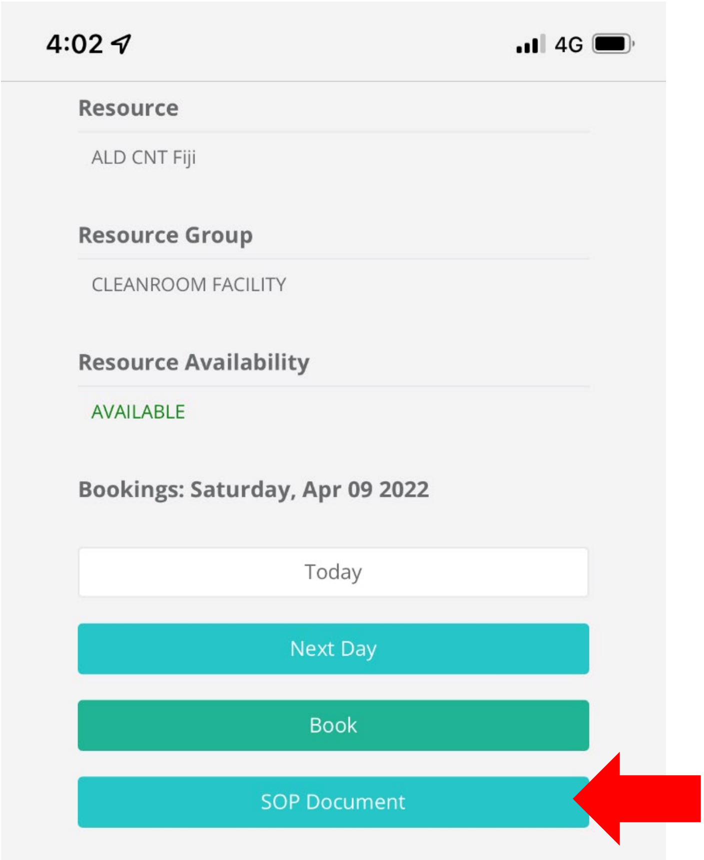
ACLS will cancel the linked assisted booking when the staff time booking is cancelled.

9.18 MCN: Edit the future assisted and unassisted bookings

Any staff could change or cancel any future assisted and unassisted bookings (exclusive of service bookings) via Assisted Calendar. Staff could see the editable bookings coloured in green.

9.19 MCN: Access resource SOP on QR code

SOP document access is available for QR code script as shown in the following snapshot.



9.20 MCN: Define Business Hours for Reports

Go to **System Settings** -> **Configure System**, click on **Business Hour Settings** to set up. The Business Hour Settings will be used at the next stage for reporting.

9.21 MCN: Stop Booking Confirmation

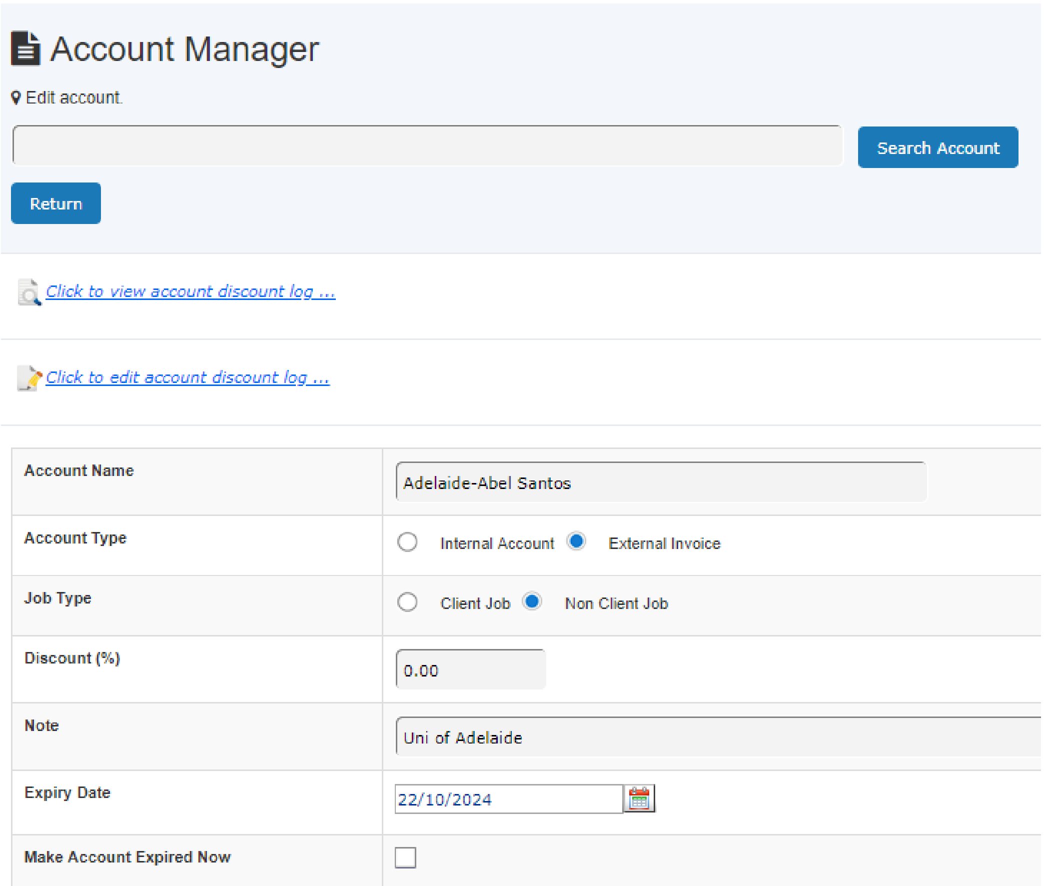
For assisted bookings, the system won't send out a booking confirmation if the **Exclude from Broadcast** setting in the user profile is checked.

9.22 MCN: Booking Confirmation for Blacklisted Users

For unassisted bookings, the system will send out a copy of the booking confirmation to the trainers of that resource if the “Black Listed” setting in the user profile is checked.

9.23 MCN: Account Discount

MCN introduces a discount concept to the account setting. Initially, all the discounts are set to zero. If you wish to change the discount, edit the account.



On the account edit page, you are provided with discount change logs and can make changes to the latest discount log in case of mistakes.

Each discount change is recorded at the date of the first day of the month. For example, if you change the discount from zero to 2.00 (2%) on 11/10/2013, then the system records the change effective date as 1/10/2013. By doing so, each discount is taken into the monthly usage calculation as a monthly discount.

All the reports and invoices are integrated with the account discount.

9.24 MCN: Track User Category Change

A tracker has been implemented to track any changes in user category so the system can accurately report the charges and billings. For example, user James books SEM230 on 1 July with user category "A", then his category is changed on 2 July to category "B" and he makes bookings on 5 July. When the system runs the report and invoicing, it uses category "A" rate to calculate the charge for the bookings on 1 July, and category "B" rate for the bookings on 5 July, respectively.

You can check user category charge records through **Charge Category Change Log.**

9.25 MCN: Broadcast Messages To Newly Trained Users

'To Newly Trained Users' is added. Click on **To Newly Trained Users** to access. As usual, type in subject and message body, select a period from last month to last 12 months, then click on 'Send Message'. The system sends the message to all the newly trained users for the selected period.

For example, if you choose 2 for Last Period in Month, the message is sent to the users who received training in the last two months.

9.26 MCN: Client Job and Non-Client Job Accounts

Client Job and Non-Client Job concept is added to account settings. By default, all accounts are client job account type. This setting is for reporting.

9.27 MCN: Instruments – Hours of Usage

Hours of Usage summarises the usage each month in the format of MCN requirements. Two options are available: Single resource hours of usage and Multiple resource hours of usage:

The process between single resource and multiple resources is the same. Choose the resource, select start month and end month, then click on **Continue** button.

9.28 MCN: FOB for User Profile

FOB tab is added to each user profile, only admin can change FOB properties:

- FOB title
- FOB type
- FOB reg date
- FOB expiry date

All users and staff FOB require expiry date. Staff and users can view FOB information through ***My Profile***.

Set New Password | Send Confirmation Notice To User | FOB Settings

Systems checks FOB daily to send out the reminder to the user whose FOB is expiring within a month.

The FOB expiring notification template is given as followings.

Dear xxx,

Please be advised that your FOB access to the Melbourne Centre for Nanofabrication (MCN) is set to expire on 02/07/2024.

To extend your fob access to MCN, please follow the steps below:

1. Email your extension request to MCN Client Service Manager (MCN-enquiries@nanomelbourne.com).

2. Make plans to attend the next MCN General Induction or Refresher Induction Training by visiting https://nanomelbourne.com/access/inductions-training/.

Kind regards.

9.29 MCN: Consumable Module Modification Requirements

- Ultimately we want the ability to specify linked consumables when making a booking.
- We already have the ACLS consumables register, where we are inputting various items such as wafers etc., that we can charge to users. What we are missing is the ability for users to "self-select" consumables as a part of their bookings. An example would be a user doing a thin film deposition of Gold. They should be able to book the tool and select how many nanometres of Gold they will use. ACLS should then add that charge to the booking. Another example would be a user booking a spin coating station... this person

should be able to specify which photoresist they are using and the number of samples they will process —all of the resists and the charge/sample would be specified in the consumables register.

- I know ACLS has all the basic functionality for this already in place in separate locations, it should just a question hooking them together.
- Resource manager should allow us to set up each tool with the relevant "linked consumables" if applicable. That is, in the booking profile for a tool, we should be able to add a section for consumables. Staff could setup a tool and select: Linked Consumables = YES/NO, and if the answer is YES, we should be able to select items from the consumables register. These items would then show up when making the bookings and the users can indicate how much they are using.
- Some accounts shall be disabled for consumable orders
- Set up default user account as the first option to the unassisted and assisted booking calendar

9.30 MCN: Accounts Used for Consumable Order

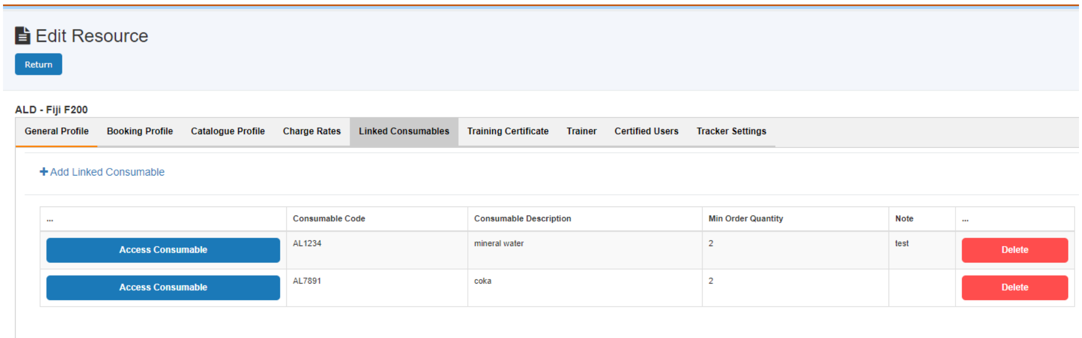
Admin can set up the account dedicated for consumable orders. In the other words, when users place the orders, they only need to choose the consumable type accounts.

- account manager to include a YES/NO control for whether an account can be used for consumables charges
- default status on an account will be YES.
- MCN staff will manually disable for accounts that should not be used for purchase of consumables
- IMPORTANT: accounts that are NO can still be used for booking of instruments.

9.31 MCN: Linked Consumables of Resources

Admin can set up consumable list for each resource. If the consumables are set up for the resource, it is compulsory for users to place the orders with the min qty for each booking.

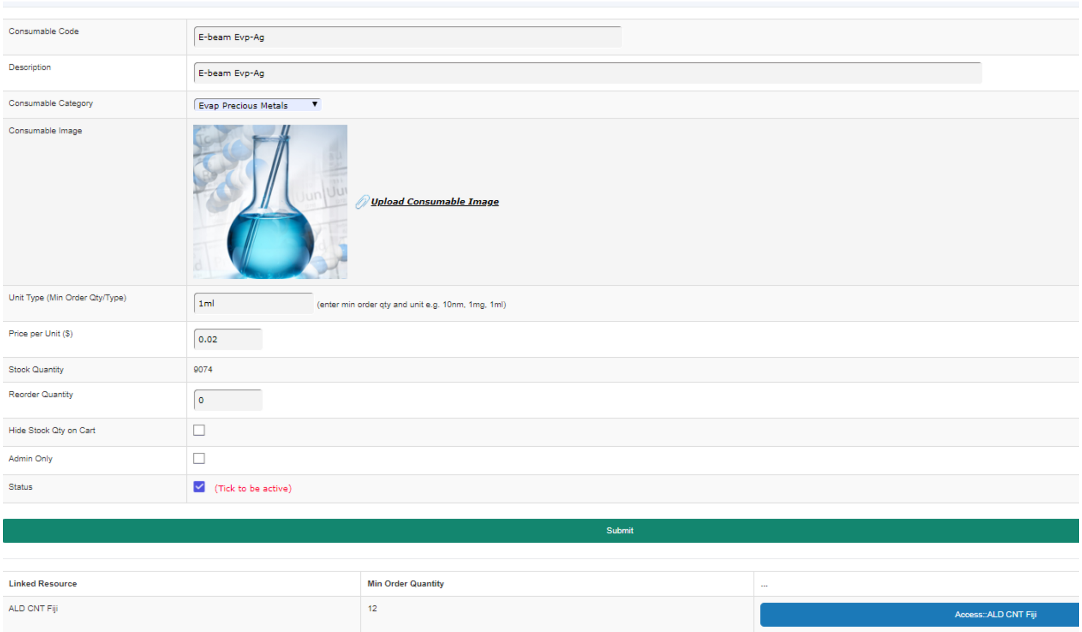
Go to Resource Manager to set up consumables.



Click on Add Linked Consumables to add consumables from the consumable library. You can access the linked consumable page or delete it.

9.32 MCN: Linked Resources of Consumables

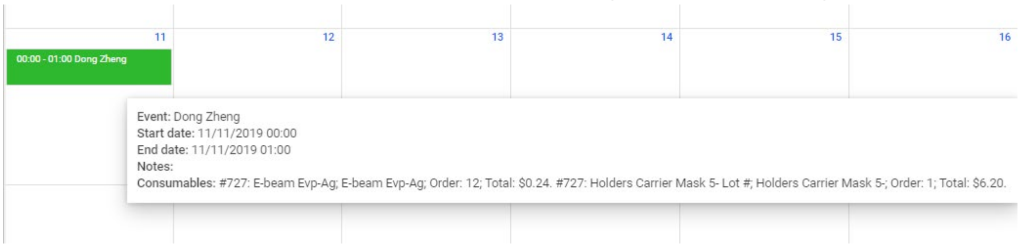
Admin can see the linked resources on the selected consumables and access the linked resources.



9.32.1 Unassisted Bookings

If linked consumables are enabled for the resources, it is compulsory to order consumable for each booking session. System does not check the order entry for the resources which do not enable the linked consumables.

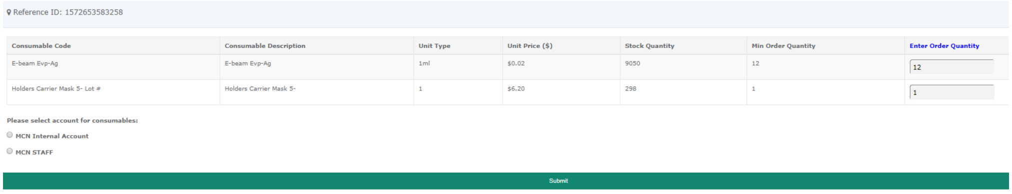
- Consumable order details are visible on booking tooltips, including order number

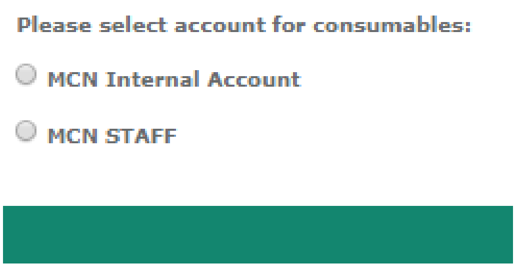


- Record consumables

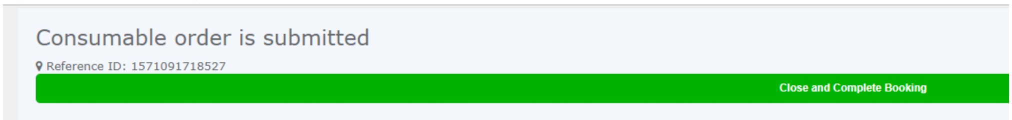
- Click on Record Consumable Button on the popup booking form to record or order consumables.

- Based on the linked consumable settings to the resource, the new page is open for the user to record consumables and account to the booking sessions.



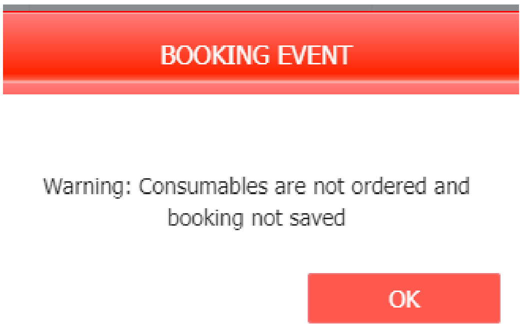


- Then enter the order quantity and the appropriate account, then submit. Then close the page by clicking on the below button and continue to the booking form. System does the check against min order quantity and update the stock quantity.
- The consumable orders made by bookings are marked as delivered or closed automatically.



- You can see the newly ordered details in the highlighted order panel.

- Upon save the bookings, the details of the consumable order or record are shown on the booking form and tooltips.
- What if users don't record or order consumables? System pops up the following alert message.

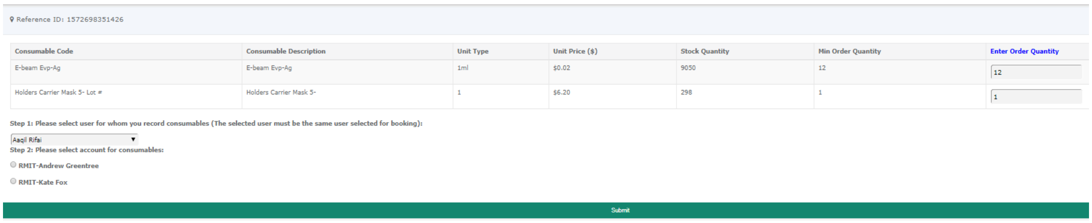


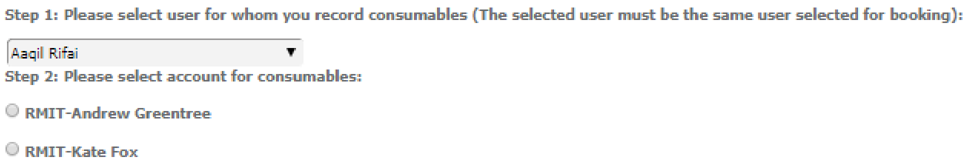
- For those resources which do not set up linked consumables, users make bookings as usual.

9.32.2 Assisted Bookings

It is the same mechanism to record the linked consumables. The difference is that system records the consumable orders to the user selected by the staff. Staff needs to select the same user for both the booking and the consumables.

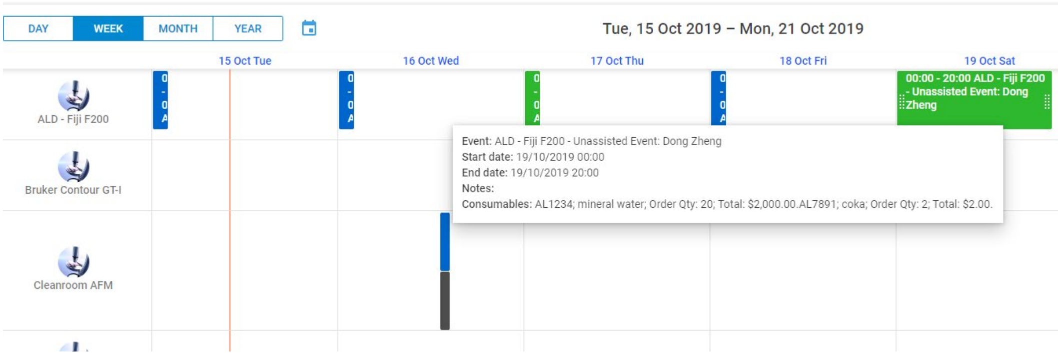
At the recording consumable page, if it is a new booking, you need to select the same user as the selected user for booking.

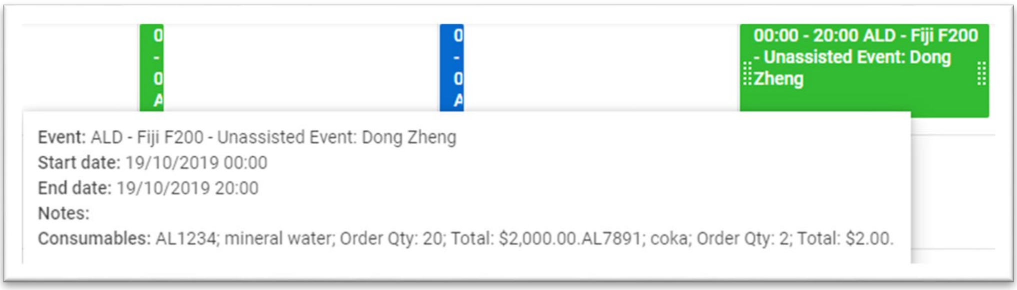




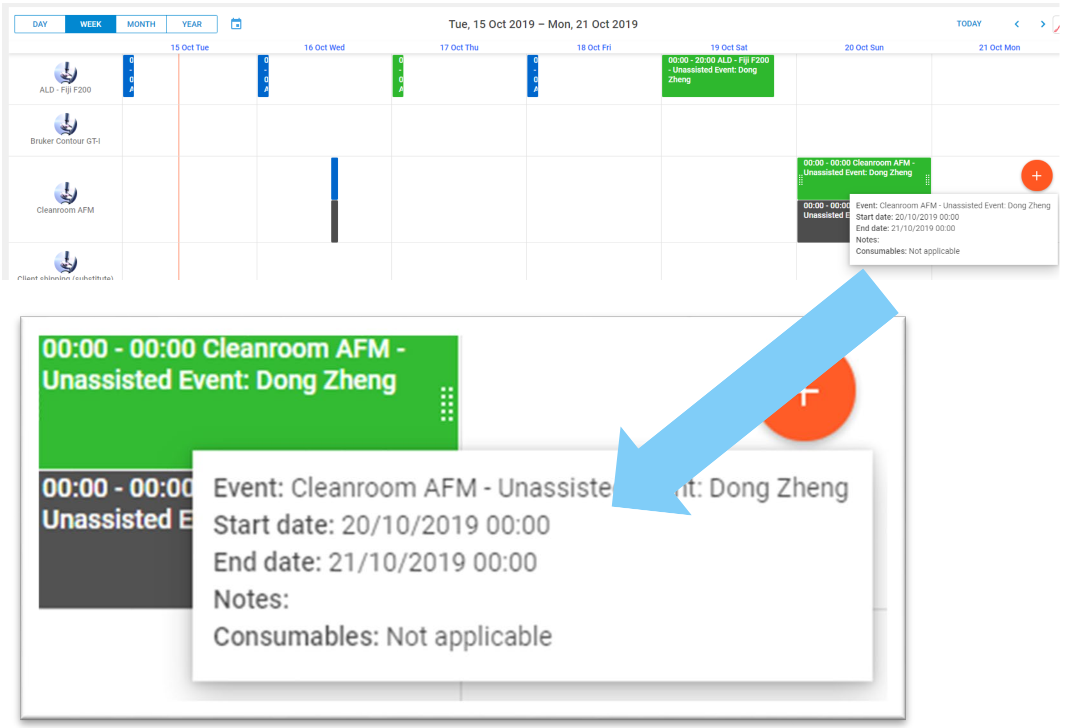
9.32.3 Timeline Bookings

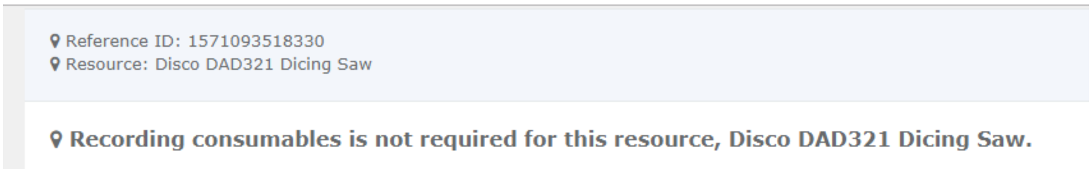
- On the timeline calendars, if one of the resource requires the linked consumables, the Record Consumable tooltips show up for all.
- Resource with linked consumables





- Resource without linked consumables: show ‘Not applicable”





9.32.4 *What if the bookings are cancelled?*

For those bookings recorded with the consumables, if the bookings are cancelled, then the orders are cancelled either, and stock quantity is adjusted.

9.32.5 *What if the consumable orders are cancelled?*

Upon cancelling the consumable orders which are recorded with the bookings, the bookings remain but the consumable orders are indicated as cancelled in the booking calendar.

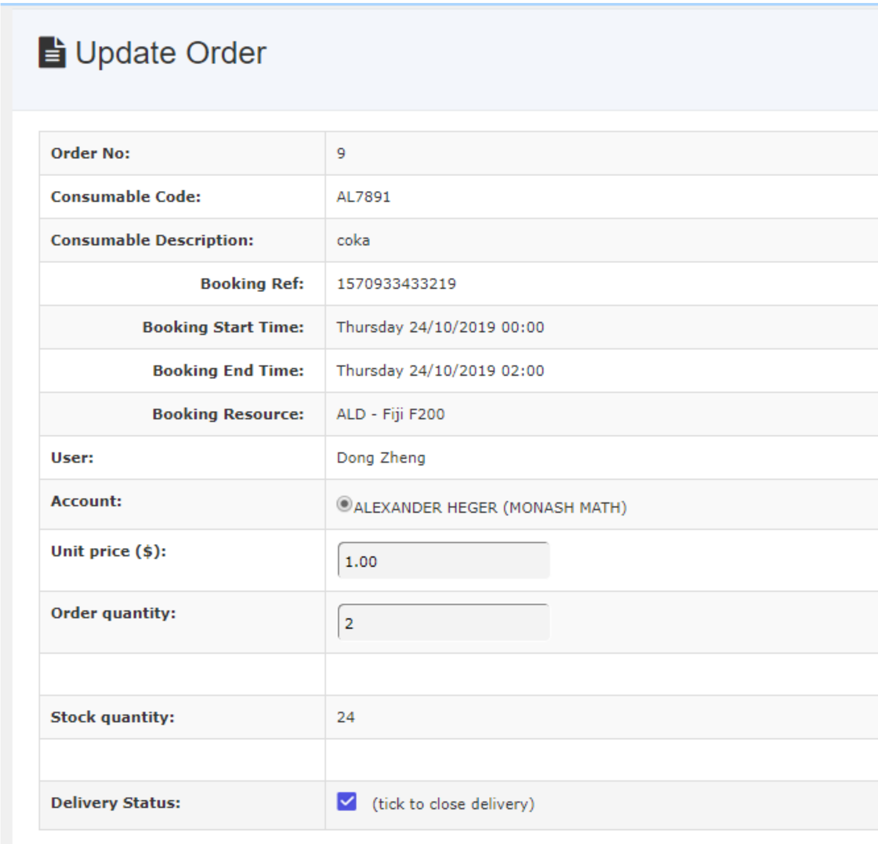
9.32.6 *My Orders Recorded BY Bookings*

- In general, there are two types of consumable orders, one from shopping carts, and the other via bookings. Those orders made by bookings are shown with the booking reference on the order summary.
- My Consumable Order button is available on booking calendar page so users can check his orders anytime.

9.32.7 Consumable Orders Recorded BY Bookings

In general, there are two types of consumable orders, one from shopping carts, and the other via bookings. Those orders made by bookings are shown with the booking reference on the order summary.

If the order is made via a booking, the booking details are shown up to the order form for changes and updates.



Update Order

Order No:	9
Consumable Code:	AL7891
Consumable Description:	coka
Booking Ref:	1570933433219
Booking Start Time:	Thursday 24/10/2019 00:00
Booking End Time:	Thursday 24/10/2019 02:00
Booking Resource:	ALD - Fiji F200
User:	Dong Zheng
Account:	ALEXANDER HEGER (MONASH MATH)
Unit price ($):	1.00
Order quantity:	2
Stock quantity:	24
Delivery Status:	(tick to close delivery)

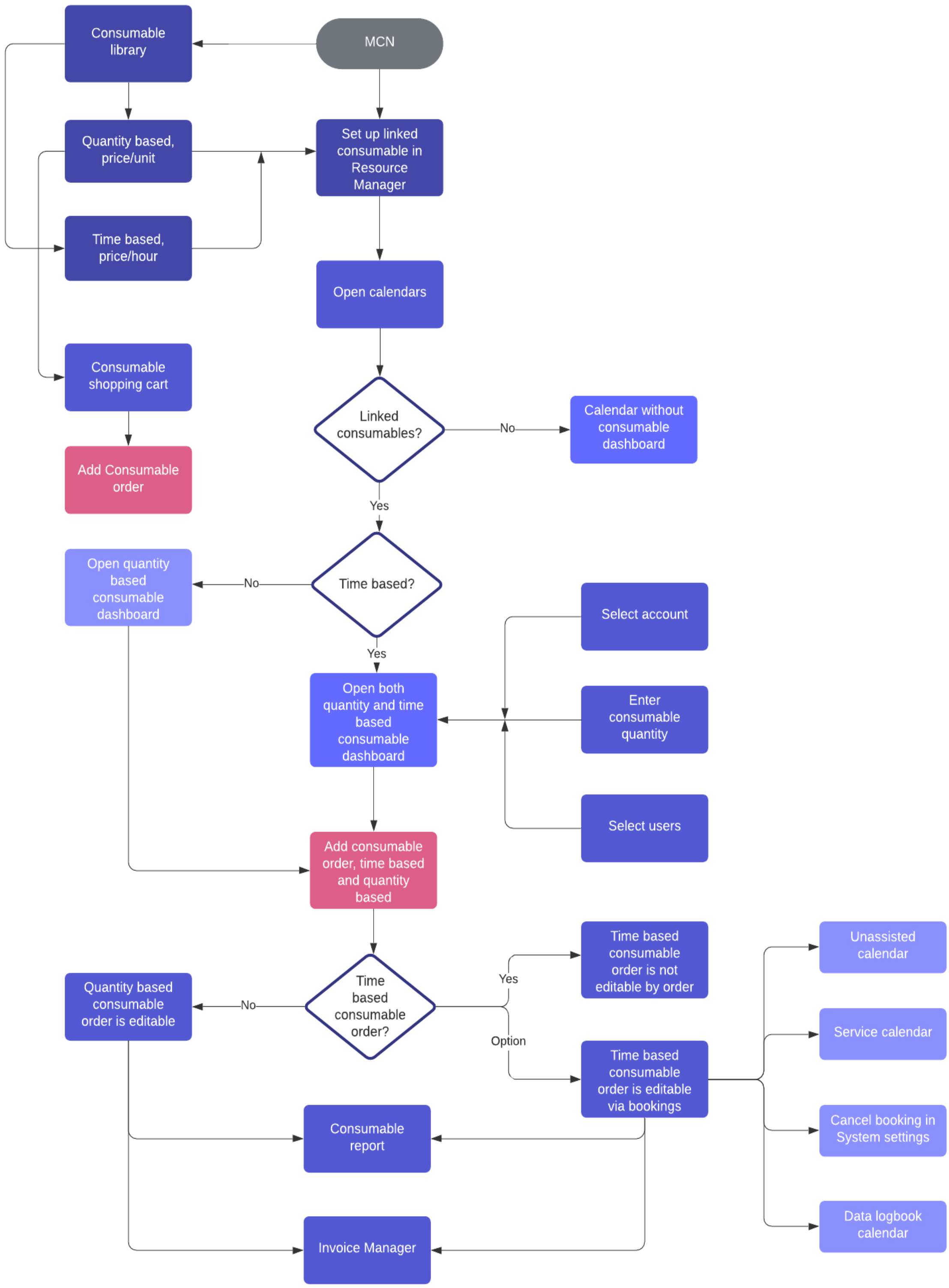
9.32.8 Booking with time-based consumable usage

Case study:

- Users make a booking on the 3D printer and the amount of 3D printer resin that is consumed depends on the length of the booking.
- It's not always possible for users to know the amount of resin they will consume in their booking so we'd like to have ACLS apply a consumables charge that is linked with the booking time itself.
- For example, John Smith books the printer for 2hrs. The rate for the "3D Printer Resource" is $10/hr. The rate for the time based consumable is set to $15/hr. John Smith will be charged for 2hr*($10/hr+$15/hr)= $50
- This could be accomplished by having the users manually specify how many hours their bookings are (basically by treating the “unit” of the consumable as hrs, but this will allow

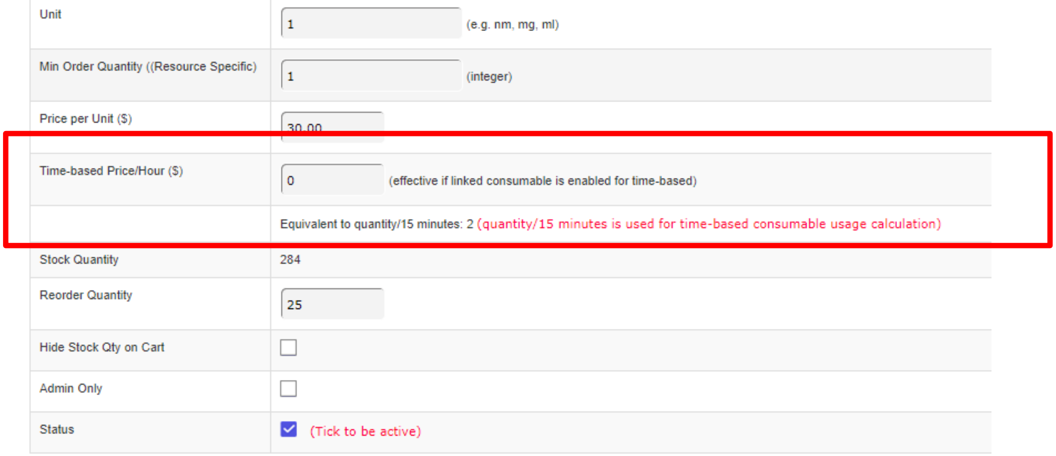
people to cheat. If ACLS is doing this calculating this charge automatically based on the length of time of the booking, it's much better.

Flow chart:



9.32.9 Set up time-based consumable charge rate

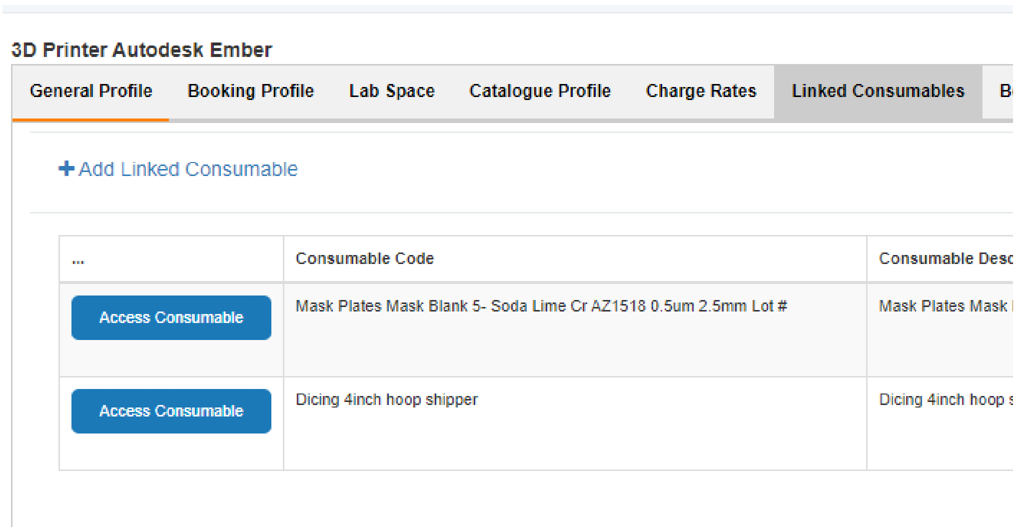
First step, go to consumable library, edit the selected consumable profile, a new setting is added as time-based price/hour. ACLS auto-calculate time-based quantity/15 minutes.

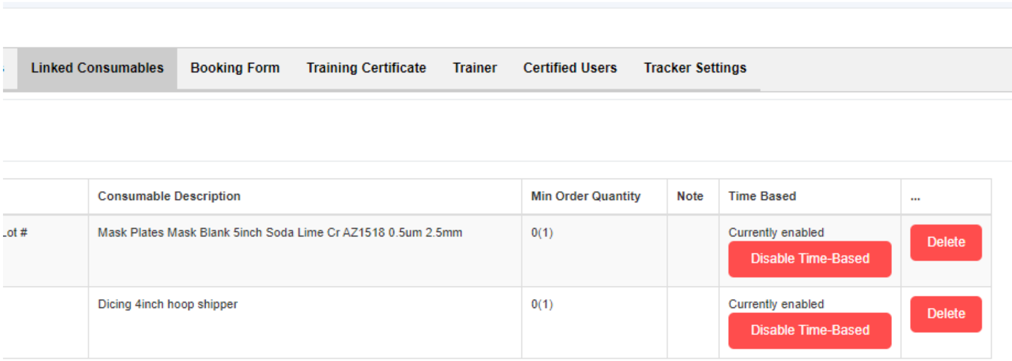


The reason to convert from price/hour to quantity/15 minutes is due to the calendar min time scale 15 minutes.

9.32.10 Linked time-based consumables to resources

Go to Resource Manager to set up linked consumables including the time-based consumables.

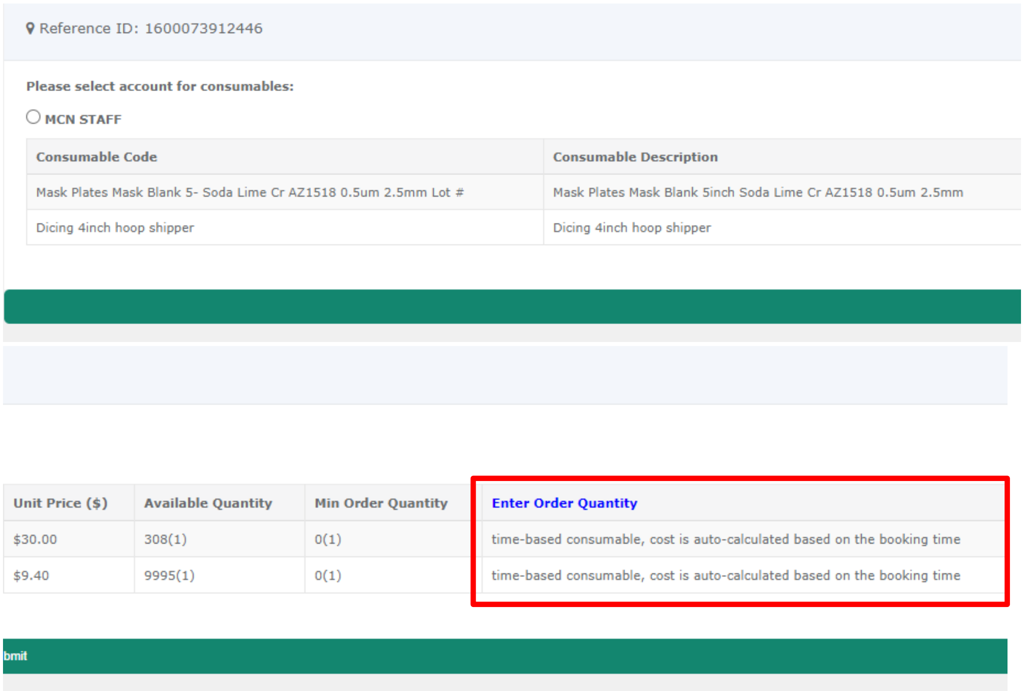




You can toggle the linked consumable state between the time-based consumable usage and quantity-based consumable usage.

9.32.11 *Time-based consumable usage*

ACLS is scripted to handle the mixed linked consumables to the resource. If the linked consumable is set as time-based, then users and staff don't need to enter the quantity. System calculates the time-based linked consumable usage according to the booking time.



Select account and save. Then calendar shows the cached result as indication.

Newly Recorded Consumables

Mask Plates Mask Blank 5- Soda Lime Cr AZ1518 0.5um 2.5mm Lot #; Mask Plates Mask Blank 5inch Soda Lime Cr AZ1518 0.5um 2.5mm; time-based consumable
Dicing 4inch hoop shipper; Dicing 4inch hoop shipper; time-based consumable

Upon saving the booking, the order is auto-calculated according to the time-based rate of the linked consumables. You are able to see the consumable orders with the indication of time-based.

...	Order Number	Year	User	Account	Consumable Code	Consumable Description	Unit
Update	1230	2020	Dong Zheng	MCN STAFF	Dicing 4inch hoop shipper	Dicing 4inch hoop shipper	1

Price per Unit	Order Quantity	Total	Order Date	Order Status	Place Order By	Cancellation Date	Delivery Date	Booking Ref
$9.40	3	$28.20	14/09/2020	Closed	Dong Zheng		14/09/2020	1600073912482 (time-based)

Update Order

Order No:	1230
Consumable Code:	Dicing 4inch hoop shipper
Consumable Description:	Dicing 4inch hoop shipper
Booking Ref:	1600073912482 (time-based)
Booking Start Time:	Wednesday 16/09/2020 00:00
Booking End Time:	Wednesday 16/09/2020 03:00
Booking Resource:	3D Printer Autodesk Ember
User:	Dong Zheng
Account:	○ MCN STAFF
Unit	1
Unit price ($):	9.40
Order quantity:	3
Available quantity:	9992
Stock quantity:	9992
Delivery Status:	☑
Delivery Date:	14/09/2020 19:49
Delivered By:	

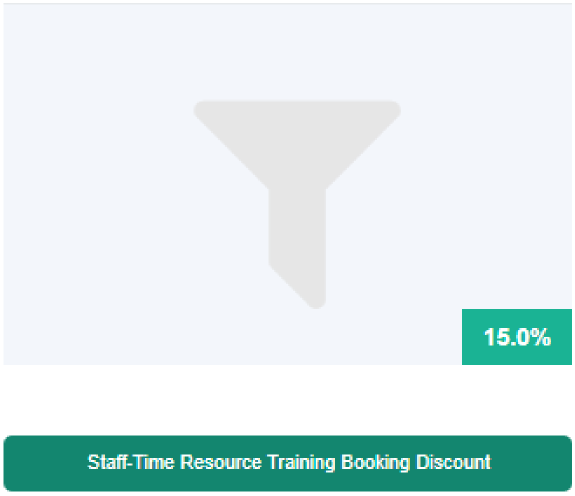
Admin can alter the order even if it is the time-based. However, when the booking is changed, this order follows the change of the booking time as it is part of the booking.

Unassisted booking calendar assisted booking calendar and time-line booking calendar are modified to handle the time-based linked consumable with the booking time.

You can cancel any bookings with the service booking calendar. If the cancelled bookings are saved with the time-based linked consumable, then the respective time-based consumable order is also cancelled.

9.32.12 *Set up staff-time resource discount*

Go to Resource Manager to access Staff-Time Resource Training Hour Discount.



Enter discount and accept, change of discount is recorded for future reference check.

9.32.13 *Apply staff-time resource training booking discount to the invoices*

Booking invoice: admin can run the invoice manually by selecting month/year and supervisor. Discount applies to the invoice; the following data columns are added:

- Staff-Time Training Hours
- Staff-Time Discount

Batch invoice: the same as the booking invoice to apply discount to the staff-time training hours

10 Appendix B - Modification for ANFF-WA

10.1 ANFF-WA: Modification Background

The essence of the problem that we have is that we want to book a tool overnight to reserve the time and ensure that no one else books it, but we do not want for the overnight hours to be counted and reported in the excel usage reports that we generate for reporting of facility usage hours.

We adopt the proposed option "Somewhere in the settings for a tool we tick a box "do not include in excel reporting overnight hours booked between 8pm and 10am.".

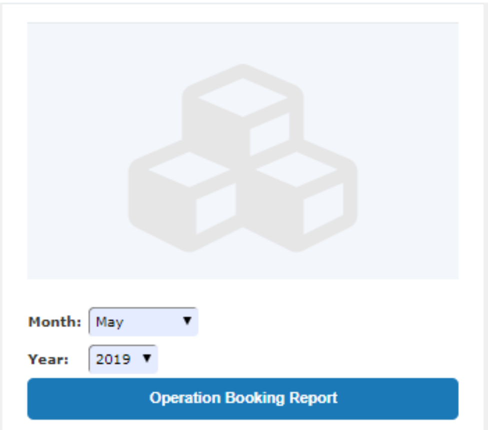
10.2 ANFF-WA: Resource Setting Changes

A special ANFF WA setting is added to the resource profile in Resource Manager to configure the resource for the special reporting hour control.

- Report Enabler: tick to enable the special hour control for report. If unchecked, report hours are calculated as usual. If checked, the report start time and end time are used to calculate. For example, the booked hours from 9 to 16, the report start time is 10 and end time is 15, the calculated usage hours are 5 instead of 7.
- Report start time: starting hour to count as reporting usage or booked hours
- Report end time: ending hour to count as reporting usage or booked hours

10.3 ANFF-WA: Report Manager

Operation and training hour report are implemented with the reporting hour controls.



ANFF WA Hours are added to the report as shown below. Both monthly and period reports are modified. Batch reports apply the same changes as well.

Previous 1 2 3 4 Next

Search:

Copy CSV Excel PDF Print

Start Time	End Time	Booked Hours	ANFF Booked Hours	Booked On	Notes
02/05/2019 10:00	02/05/2019 13:00	3	3	01/05/2019	CoPd deposition
14/05/2019 14:00	14/05/2019 17:00	3	1	14/05/2019	CoPd alloy fabrication
15/05/2019 12:30	15/05/2019 14:30	2	2	15/05/2019	CoPd alloy thin film
17/05/2019 10:30	17/05/2019 13:00	2.5	2.5	17/05/2019	CoPd deposition
17/05/2019 13:00	17/05/2019 17:00	4	2	17/05/2019	Shut-down due to compressed airline works
21/05/2019 12:00	21/05/2019 15:00	3	3	21/05/2019	CoPd deposition
23/05/2019 11:00	23/05/2019 13:30	2.5	2.5	23/05/2019	target changes Fe-larger thanCo Co-larger thanNi add additional Al foil to target shutter and target shield of Pd
24/05/2019 12:45	24/05/2019 15:45	3	2.25	24/05/2019	CoPd thin film deposition
		23	18.25		

11 Appendix C - Modification for ANFF-QLD

11.1 ANFF-QLD: Modification Background

ANFF QLD Node requested to modify the ACLS version to meet its own operational requirements. The business process has been overhauled in ACLS to deal with the business model integrating with projects and memberships.

This guide intends to cover information about the changes to many aspects of ACLS. In short, they are:

- Project membership registration
- Project top up hours tracking
- Project daily updating to remaining hours
- Resource registration
- User booking tool with booking reminder
  Booking data report: All the data reports are set up for the project membership rate accordingly. Booking data invoicing: All the invoice statements are set up for the project membership rate accordingly. The system needs to be able to generate monthly invoice statements per supervisor

11.2 ANFF-QLD: Register Project

Through **Utilities -> Project Manager**, you can set up project memberships.

- Add project
- Active projects
- Archive projects
- Sort projects by supervisors
- Rate of charge tier vs charge category

As the charge rate is defined by charge tier and charge category (or so-called charge group), you must set up **Charge Tier** and **Charge Category** before clicking **Project Manager**.

- Step 1: Set Up Charge Category

  Through **Charge Category Manager**, you can set up a list of categories as illustrated below.

- Step 2: Set Up Charge Tier

  Through **Charge Tier Manager,** you can set up charge tiers.

- Step 3: Set Up Rate

  When you click on **Project Manager -> Rate Settings of Charge Tier vs Charge Category**, you can see a rate matrix table as shown below.

Click on checkbox next to **Edit** to change the rate, and click on **Accept** to save the rate.

- Step 4: Register Project

Through **Project Manager**, you can define which supervisor has membership of the project.

You can add a new project, or edit the existing project, but you cannot delete the project. To edit the project, select the project from the dropdown list, click on Edit.

Description of project parameters:

Parameter	Description
Project Name	Project name, should be verified by the staff
Charge Category	Charge category, set up through charge category manager
Charge Tier	Charge tier, set up through charge tier manager
Charge Rate/Hour	Auto-loads after the selection of charge category and charge tier
Supervisor	Supervisor who oversees the project
Membership	Check the box to allocate the project to membership of a supervisor. In other words, the system tracks the project booking hours daily if inclusive.
Remaining Hours	Balance hours for each membership
Project Status	Project is considered 'active' even if the membership is expired. You have to manually set it as 'inactive' to switch it off and prevent it being used by users to book facilities.

11.3 ANFF-QLD: Active/Archived projects

Live search and exportable feature are available for the active and archived projects.

11.4 ANFF-QLD: Register Membership

Through **Utilities -> Supervisor Manager**, you can set up memberships.

Each supervisor can have charge of only one membership, but each membership can connect to multiple projects through the project settings explained above.

11.5 ANFF-QLD: Update Project to User Profile

You can link projects to the user profile in Edit User Profile.

11.6 ANFF-QLD: FAQ

1. What is the relationship between project and membership?

Each project has a cost centre in relation to membership, which is allocated to each supervisor through Supervisor Manager. However, if you choose to exclude a project from membership, then the system won't track the booking hours for that project in relation to the membership. For example, supervisor David Hoffman has multiple projects, one of them is project 'UNSW', if you set this project exclusive of David Hoffman's membership, then none of the bookings under the project 'UNSW' will be included in the cost calculation of the remaining hours of Hoffman's membership.

2. What do you mean the system tracks the top up records?

On the supervisor table, you can click to view the history of top up hours.

3. How does the system update the remaining hours automatically?

ACLS email server runs a remaining hour check against the previous day bookings every midnight. If the remaining hours are less than the pre-set alert threshold, the system sends an alert message to the generic 'Contact Us Email' in the system settings.

4. If I add or cancel past booked sessions through the Data Logbook Manager, can the system automatically update the remaining hours?

No. You need to update it manually. Do this through project top up.

12 Appendix D – Modification for UOW-SMAH-B32

This appendix provides an operational guide to the customized ACLS for SMAH B32.

12.1 UOW-SMAH-B32: Modification Background

Equipment Maintenance Management functions

Users and managers need to know when equipment is not available due to being faulty or damaged, or for a scheduled maintenance/service. In addition, a fault notification system needs to be included to allow users to notify the system and therefore management if and when any equipment is faulty, a brief description of the incident or fault, the extent of the damage, and urgency of response needed.

Category	Description
Green light	Equipment all ok
Amber light	Needs maintenance but can continue working | handle broken but still operating
Red light	Needs maintenance, equipment inoperable | microscope faulty Incident, other equipment damaged | chemical leak, storage cupboard damaged

In the latter situation the whole room would be shut. In this case all related equipment housed in the same room would need to be marked as “red light” so all users can see they can’t access it. Any user who has booked the equipment in the next X period (day? week?) should be emailed that an incident has occurred that might limit their access to the booked equipment, and to see lab staff regarding maintenance timeframes.

SMAH requires that lab staff can schedule regular periods when equipment will be out of service (ie un-bookable) for maintenance. This is best done as they add each new piece of equipment to the resource group. At this time, the periodic maintenance requirements and costs, and contractor/maintenance supplier contact details should be added, as well as the cost of the item purchased, and when it is due to be replaced. The dates of each of these events could then be used to provide enhanced ability to pro-actively manage the equipment via the Dashboard, see below.

Other functions required include:

- Repair/maintenance schedules, that show up on the Dashboard as a reminder to organize them
- Records of all repairs/maintenance and costs, who performed them, what the problem was, etc
- Records of whether works were scheduled or unscheduled
- A place to record:
    - Original cost of item
    - Depreciation
    - Details of service contracts – cost, and what it covers
    - Lifespan of item

    - End of Life calculation, that warns on the Dashboard when it's drawing close (more notice for more expensive items)
    - Asset numbers
    - Suppliers and supplier details
    - Details of required software
    - Whether it is networked or not
    - Plus an extra notes section for recording things such as computer passwords and anything else we've forgotten.

Terminology

Before continuing to the new features implemented for SMAH, it is worthwhile to address the terms used throughout the system and this document.

- Service: refers to "unscheduled service"
- Maintenance: refers to "scheduled maintenance"
    - Internal maintenance: performed by local staff
    - External maintenance: performed by external company
- Incident: refers to anything users wish to report to staff about a resource according to the pre-set incident category
- Asset: refers to "any resource" to be registered as an "asset". So an asset must be a resource, but not vice versa
- Material: refers to any materialized items, be they hard material, software, or an application
- Labour: refers to any work involved
- Resource Assembly: refers to assembly parts or components of a resource

12.2 UOW-SMAH-B32: 2018 Requested Changes

Booking Home Page (General and System Administrators)

- Hide Resource Catalogue

Dashboard (General and System Administrators)

- We want to see the following:
    - My Home (Hide Forms, Resource Catalogue, Corea Analytics)
    - My Profile
    - Training Records
    - Resource Status
    - Resource Alerts

Incidents (General)

- Disable Incident section for non-system administrators

Contract (Funding)

- Purchase Date

- Funding Category (create drop-down list via Register Funding Category)
- Cost Centre Owner (create drop-down list via Register Cost Centre Owner)
- Cost Centre Number (max length 30)
- Amount ($)
- Notes

Finance Report

- Create a Funding Report (with total amount calculated for each resource):

    - Resource Group
    - Resource Name
    - Resource Assembly
    - Purchase Date
    - Funding Category (create funding drop down list)
    - Owner
    - Cost Centre Number
    - Amount ($)
    - Notes

Register Funding Category

- Create something similar to Incident Category Editor

Contract Record Desk

- For Contract (Maintenance) and Contract (Warranty) can we please make sure that the Reminder Date remains ticked when editing.

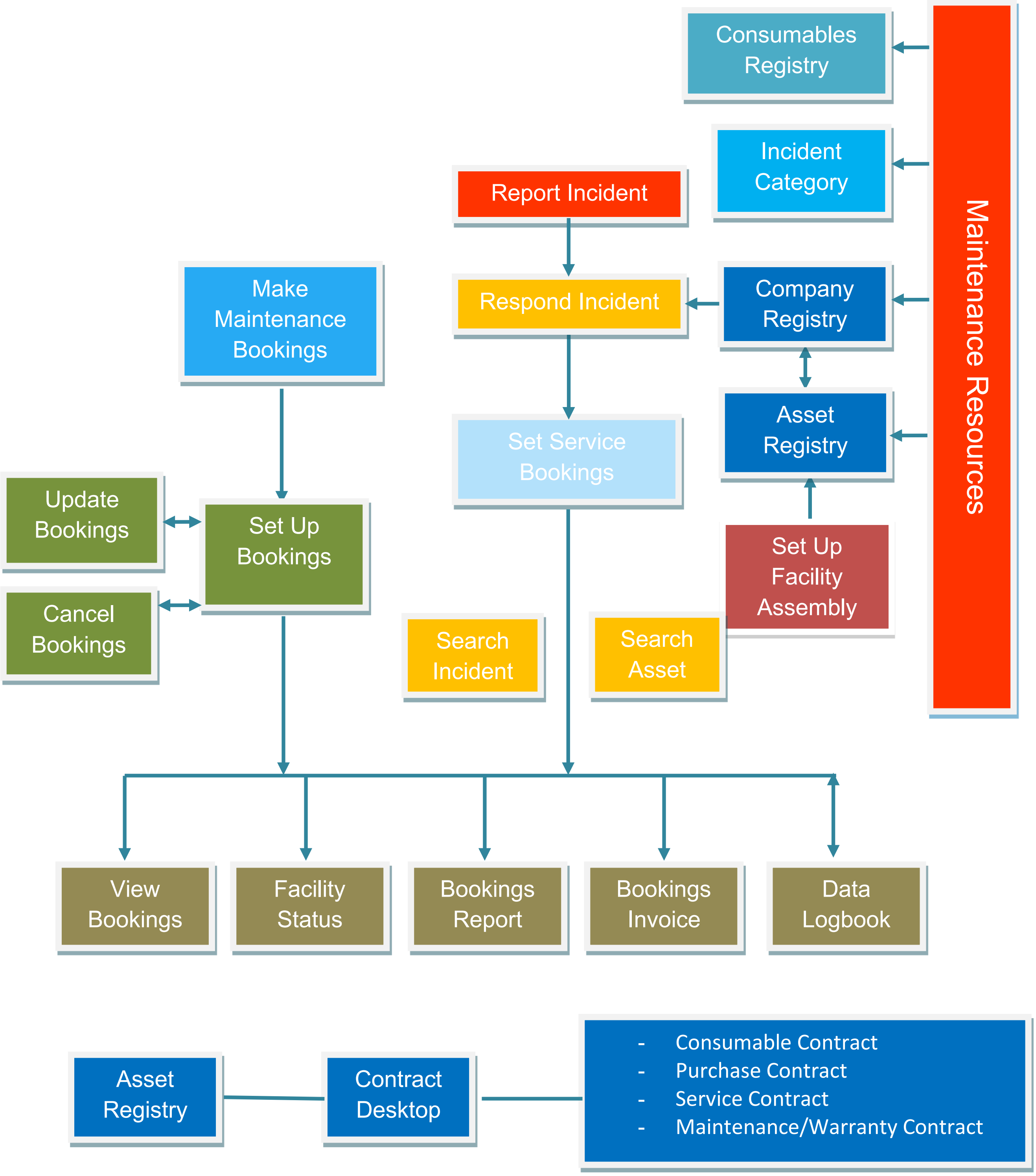
Incident Date

- We want to select the Incident Date instead of it automatically selecting the day it was reported on the Booking System

Search Resource Profile

- Add ‘Maintenance Agreement Number’ to the search criteria.

Flow Chart of Process



The following chapters relate directly to the process set out in the flow chart.

12.3 UOW-SMAH-B32: How to Set Up Incident Category

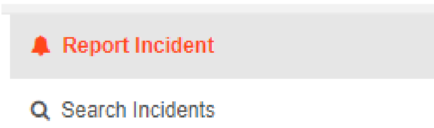
First, you need to set up the Incident Category so that users can lodge the incident properly. Go to ***Maintenance Resources*** to click on ***Register Incident Category.***

The parameters of the settings are described in detail as follows:

- Incident Category Title: the name of the category
- Ownership of Actions: staff listed as owner of the category will receive the incident notification

12.4 UOW-SMAH-B32: How to Report an Incident (System Administrator Only)

Through ***Incident,*** you can easily browse the incident menu as illustrated below.



Functions	Access Control
Report Incident	All users can access to lodge an incident.
Search Incident	Users can only search those incidents they submitted. Open to all staff.

Click on ***Report Incident*** to lodge an incident:

- Select Resource Group
- Select Resource
- Select Incident Category
- Enter description of fault / incident
- Incident date

Then Submit. Upon submission, the system sends an email notification to the staff-in-charge, the owner(s) of the incident category.

12.5 UOW-SMAH-B32: How to Respond to an Incident

The system shows the reported incidents on My Attention, simply click on ***To Update*** or ***To Respond*** next to each incident to start your action.

The information box shows up the incident report and last responding information, including action note for reference.

On this page, you are shown full information about the incident and need to fill out the processing details to complete the action:

- Processing status: open or closed
- Incident description: able to be edited by staff to update the original description submitted
- Light indicator:
    - Green to represent normal
    - Amber to represent minor faults
    - Red to represent medium faults
    - Flash Red to represent severe faults

Category	Description
Green light	Equipment all ok
Amber light	Needs maintenance but can continue working | handle broken but still operating
Red light	Needs maintenance, equipment inoperable | microscope faulty
Flash Red Light	Incident, other equipment damaged | chemical leak, storage cupboard damaged

- Level of Actions: as stated above, 4 to choose from
- Company: select service company from the list
- Action Note: for action messages
- Unscheduled Service Bookings:
    - If you enable a service booking, then you need to select start time and end time

The history of response is shown at the bottom of the page. Simply click on ***and more …*** to view details.

When you click on ***Continue*** button, the system shows you the final page to confirm and complete:

If you want to make changes before the final completion, click on ***Edit*** to go back to the previous data entry page. Or click on ***Complete*** to submit the response.

12.6 UOW-SMAH-B32: How to Search for an Incident

Multiple searching tools are provided to find incidents: by status, by resource and by incident category. They are only accessible to staff members.

My Reported Incidents offers users a tool to check their reported incident details.Clicking on ***Processing Details*** to explore all processing records. You may choose not to close the incident ticket each time you process it, so you can check the historical records for multiple responses to the incident ticket.

12.7 UOW-SMAH-B32: How to Make Scheduled Maintenance & Unscheduled Service Bookings

By default, all unscheduled service bookings can only be made through the incident response process.

Before going into this subject further, let's look at how to set up a few things first:

- Register Company:

Go to ***Maintenance Resources -> Register Company.***

You can add and edit companies as required. Here is the template to enter the relevant data:

Up to three contacts can be added for the same company. To remove a company from the active list, simply uncheck the box of "Enabled".

- Register Resource Profile:

Following a request made by SMAH, we introduced the new concept of Resource Assembly to manage the asset by both Resource and Assembly (one level down).

You can set the resource assembly through ***Resource Manager.***

We need to define the term asset: In the system, an asset must be a resource or resource assembly, but a resource or resource assembly does not have to be an asset. Before you can register a resource assembly as an asset, you must register its resource as a resource profile first.

Data fields are defined as following:

Purchase Date	15.7.10
Original cost of item	$155,000
Depreciation	5%pa
Details of service contracts – cost, and what it covers	Cost: $15,000 per year Covers: 2 x scheduled maintenance per year, parts for scheduled maintenance, travel time. Does not cover services for breakdowns
Lifespan of item	7 yrs
End of Life calculation, that warns on the Dashboard when it's drawing close (more notice for more expensive items)	15.7.17
Asset numbers	12 588746 48976 (the number will come off a barcode issued by the university)
Location	Bldg 32.115
Suppliers & supplier details	KI Scientific 41564 Smith Street Sydney Ph 6351 6112 Fax 4543 1454 Contact Peter Jones Email pjones@ki.com.au
Details of required software	Software is called 'flowjoe'. Needs to work from Mac with OS10.4 or higher.
Whether it is networked or not	Yes, data point number A-226

Extra notes section to record eg computer passwords and any extra information	Password for software is: SMAH446

Data entry is explained as below:

Parameter	Description
Resource	**Not editable**
Manufacturer	By selection
Asset Number	As per your local requirement
Purchase Order Number	As per your local requirement
Model Number/Name	As per your local requirement
Serial Number	As per your local requirement
Location	Where it is located
Original Cost	Purchase price of the resource
Purchase Date	Date of procurement
Depreciation/Year	Percentage
Lifespan	Number of Years
End of Life calculation	Date of selection
Current Value After Depreciation	Calculated by the system automatically
Resource Networked	Yes/No
Software Details	Detailed description of software
Passwords	Password for applications
Notes	For anything you wish to record

To record the contract, click on ***Contract Record Desk*** at the bottom of the page.

There are 3 types of contracts defined as follows:

- Consumable contract:

Purchase Date	Description	Quantity	Total Cost	Notes
Calendar selection	Drop down list of active consumables from registry		$ = Automatically calculated based on quantity entered and total cost in registry	
01/01/12	Formalin, 5 L bottle	2	$24	

- Warranty / Maintenance:

Purchase Date	Manufacturer / Service Provider	Valid From	Valid To	Total Cost	Status	Years	Cost per calendar year*	Contract pdf	Notes

Calendar selection	Drop down list	Calendar selection	Calendar selection	$	Automatically calculated based on valid until date < current date		$ = Calculated from total cost, number of years, and valid to /from dates
13/12/08	Thermo	01/01/10	31/12/11	$1500	Inactive	2	$750
10/12/11	Thermo	01/01/12	31/12/14	$2000	Active	2	$1000

- Service contract:

Service Date	Incident Number	Manufacturer / Service Provider	Total Cost	Contract pdf	Notes
Calendar selection					
05/03/10	4	Thermo	$1000		
16/09/10	12	Thermo	$500		
01/3/11	35	Thermo	$650		

- Purchase contract:

Contract pdf	Notes

You can add as many contracts per asset as you wish. Types of contracts are predefined in the system:

- Consumables
- Maintenance
- Service
- Purchase
- Warranty
- Funding

Click on ***and details*** to see each contract under contract type. Through this option you can register contracts by different types.

- Register Consumables:

You can register new consumables and edit those with active status.

To find the registered consumables, simply type keywords to find them. If keywords are not entered, search for all.

For consumables with inactive status, you can only edit those that have expired less than 30 days. Here are the details of consumable parameters:

Description	Cost	Supplier	Catalogue Number	Valid From	Valid Until	Status	Notes
Text box (at least 75 characters)	$	Drop down list of manufacturers		Calendar selection	Calendar selection	Automatically calculated based	

		from company registry			on valid until date < current date
Nitrogen Gas, G-size cylinder	$12	BOC	123	01/01/10	Active

Reporting and tracking consumables will be implemented in the next stage.

- Scheduled Maintenance Bookings:

You have the option to choose the booking type: internal or external. The difference between the two is that you don't need to select the company for internal maintenance bookings.

12.8 UOW-SMAH-B32: Contract Reminder Alert

The contract reminder alert applies to maintenance and warranty contracts. Upon activating the alert, an email alert will be sent out to the staff (set up through email receivers).

Go to ***Email Receiver*** to set up the proper receivers for the contract expiry alerts.

12.9 UOW-SMAH-B32: Search Contract

Searching contract page is modified to suit SMAH needs.

Resource	Search Criteria (optional)
Resource Group	Search Criteria (optional)
Resource Assembly	Search Criteria (optional)
Company	Search Criteria (optional)
Type	Tick boxes for: All, Consumable, Breakdown, Maintenance, Purchase, Warranty
Dates	Search Criteria – start date and end date (optional)

12.10 UOW-SMAH-B32: Access to Resource Lifespan

Through ***Report Manager -> Resource Lifespan Summary***, you are able to see the lifespan summary as below:

If you don't enter any keywords to search, the system will show all.

12.11 UOW-SMAH-B32: Finance Report

The objective of the finance report is to provide an overview of cost factors of asset contracts. Three report types are given for selection:

- Summary by resource
- Summary by contract type
- Itemised report

Through the option table as below, you can sort the report by a number of options.

Report Type	Radio buttons: Summary by Resource (default), Summary by Contract Type, Itemised Report
Resource	Search Criteria (optional)
Resource Group	Search Criteria (optional)
Resource Assembly	Search Criteria (optional)
Company	Search Criteria (optional)
Type	Tick boxes for All, maintenance, service, consumable or asset
Date	Search Criteria – start date and end date (optional) Maintenance – use Valid To date Service – use Service Date Consumables – use Start Date Asset – use Purchase Date

Through the resource group, resource and resource assembly are linked for selection. The report depends on the selections as described below:

- If a resource group is selected ONLY, then the report runs against the selected resource group
- If a resource is selected ONLY, then the report runs against the selected resource
- If resource assembly is selected ONLY, then the report runs against the selected resource assembly
- If no resource group is selected, then the report runs against all the resources

The itemised report does not include assets as the contract type is not available for assets. Assets can have a few contract types, but assets are not contract types.

12.12 UOW-SMAH-B32: Booking Report

Booking Report is modified to provide an option table, so you can generate the following report types.

- Summary by resource
- Summary by booking type
- Summary by supervisor
- Itemised report

`In this modification, the concept of 'Report – Hours per Day' is introduced. To make it work, you need to go to ***Resource Manager*** to set this up for each resource. The default is zero.

12.13 UOW-SMAH-B32: Set Up Unit Responsible

Unit Responsible is required to manage each resource group in SMAH to own the following services.

- Who responds to ***Training and Support Requests***
- Who responds to ***Incidents***
- Who issues ***Training Certificates***

Go to ***Staff -> Unit Responsible Manager*** to set up. Go to ***Resource Manager***, Unit Responsible is assigned to each resource group.

12.14 UOW-SMAH-B32: Set Up User Theme

User Theme comes with the three choices at this stage would be 'Chronic Conditions and Lifestyle', 'Diagnostics and Therapeutics' and 'Mental Health and the Ageing Brain'.

Go to ***System Settings -> User Theme*** to set up.

12.15 UOW-SMAH-B32: FAQ

1. What happens after an incident submission by users?

Staff-in-charge will receive an email notice. If staff do not respond to the incident, nothing is alerted through View Bookings and Resource Status.

2. Why does the damage level indication show "unknown" on My Dashboard?

It means that this request has not been responded to yet, so damage indication is unknown.

3. Why are there two buttons for lodged incidents: "To Update" and "To Respond"?

*If the incident has been responded to by staff but is not closed yet, then the system shows "**Update**", waiting for further action. If there has been no response by staff yet, then the system shows "**Respond**".*

4. Can we edit the response if we make mistakes?

No, the system needs to record each response on the original form regardless. You can update later to correct mistakes.

5. Can we edit the original incident description written by users?

Yes, you can.

6. What happens after staff respond to an incident?

After responding to a reported incident, the system carries out the following actions:

- *The system sends an email notification to the reporting user to inform them that the incident has been responded to. However, this occurs for the initial response only.*
- *Shows the operation status on* ***Resource Status*** *page.*

7. How do we get an explanation of an incident light indicator?

Move the mouse over the light indicator and a text box appears with an explanation.

8. Can we edit and cancel scheduled maintenance and unscheduled service bookings?

Yes. For scheduled maintenance bookings, you can do this through ***Booking Calendar*** *page. Alternatively, you can edit or cancel both types through* ***Data Logbook Manager*****.**

9. Do we have to set up asset to resource before making maintenance and service bookings?

This is not necessary.

10. Can we search resource profiles by keywords?

Yes, you can search easily using keywords as illustrated below.

11. Can we search contracts by keywords?

Yes, you can.

12. What are the criteria to set up consumables?

You can only have one valid consumable with the same name at any one time. So when you register a consumables contract, you can pick the correct one with the selected date.

13. Can we upload more than more documents per contract?

Yes.

14. Can we issue training certificate to the user to record trainer and training date?

Yes. Go to user profile to edit user certificate.

13 Appendix E – Modification for DEAKIN-IFM

13.1 DEAKIN-IFM: Define Business Hours

Go to ***System Settings -> Configure System -> Business Hour Settings*** to set up. Business hour settings will be used to identify 'Out-Of-Hour' bookings.

13.2 DEAKIN-IFM: Set Up Technical Manager Group and Security Officer Group

Two new generic groups are added to ACLS: Technical Manager and Security Officer. You need to go to ***Access Group Manager*** to set up the appropriate groups against the generic group settings. Then you can set the access group for the users who are security officers or technical managers.

For security officer group, booking settings are irrelevant as they are not allowed to book.

13.3 DEAKIN-IFM: Set Certificate Expiry Control

A new expiry date control is introduced to the certificate expiry mechanism. If "valid to expiry date" control is set, then the user certificate expires upon the expiry date. Go to ***Training Manager***, pick a resource, and click on ***Certificate Registration***.

There are two options for certificate expiry mechanism:

- Valid Period: user certificates expire after the valid period following the last access to ACLS.
- Valid to Expiring Date: Once you set this to ON, the certificate expires on the expiry date regardless of the access to ACLS of the users holding the certificates.

13.4 DEAKIN-IFM: Booking Summary View

Booking Summary View is implemented according to IFM requirements. There are two views available:

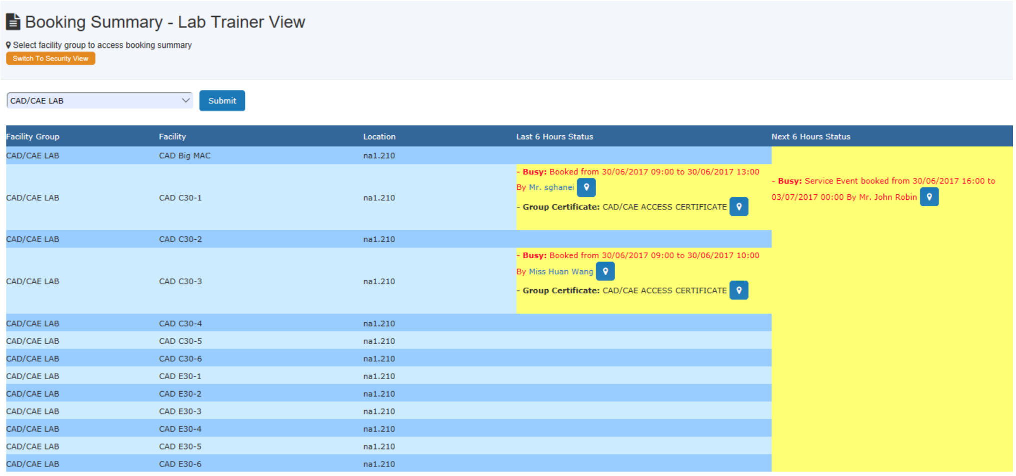
- Lab trainer view
- Security view

Lab Trainer View:

Technical managers and lab trainers can approve 'unapproved' bookings from this view. This view is grouped and sorted by the resource groups. You are able to toggle the booking status view of each resource group by clicking on the links.

Technical managers can access both lab trainer view and security view. The summary provides the following booking status:

- Last 6 hours
- Current
- Next 6 hours



Security View:

Security view is the security officer’s view of bookings. This view is grouped and sorted by resource locations.

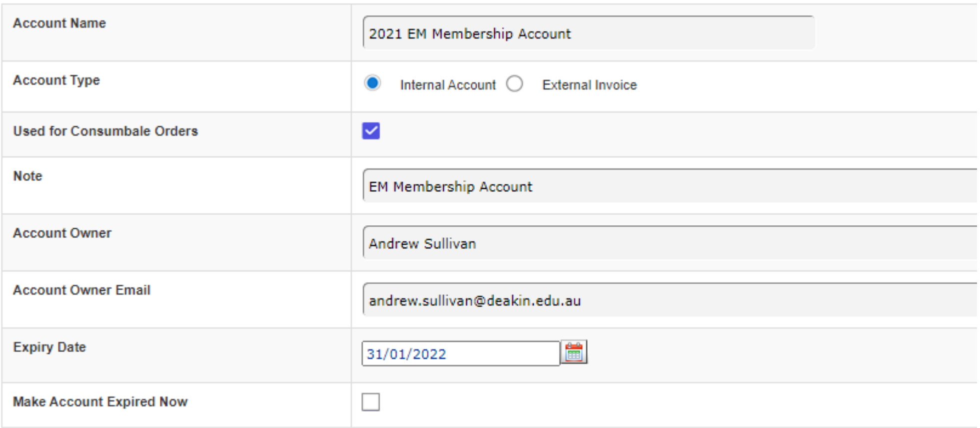
13.5 DEAKIN-IFM: Approve Out-of-Hours Bookings on My Attention

On ‘Approve Bookings’ and ‘Approve Out-of-Hours Bookings’, you are able to see the latest user training record and contact users by email if needed.

13.6 DEAKIN-IFM: Account Owners

Account owners are required by IFM so ACLS can generate invoices either account owners or user’s supervisor.

Go to ***Account Manager*** to add the account owner and email. By default, all the existing accounts have no account owner and owner email.



If account owners are not set up, then you won't be able to run account owner invoices.

13.7 DEAKIN-IFM: Account Owner Invoices

In ACLS, there are two functions to create invoices: Resource Booking Invoicing and Resource Batch Invoicing.

- Resource Booking Invoicing:

  You can generate single invoices as the function name is stated.

  Supervisor invoicing is the same function as what you are familiar with. The account owner invoicing is the newly implemented.

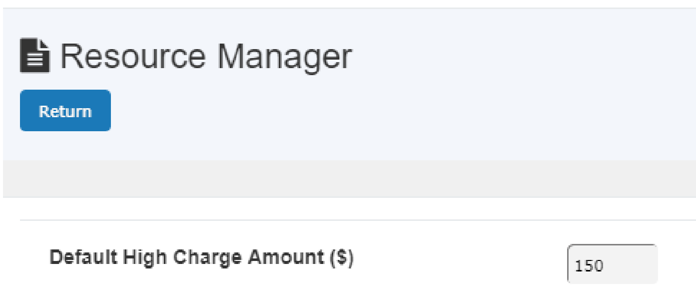
- Resource Batch Invoicing:

  You can generate batch invoices as the function name is stated. The entire batch invoicing is re-designed to be consistent with the tile design concepts. You can email selected invoice to supervisor or account owner, or email to all.

13.8 DEAKIN-IFM: High charge bookings

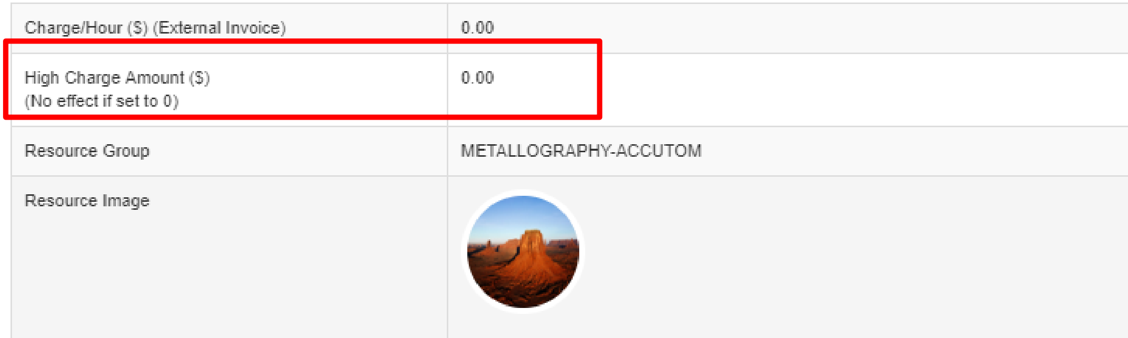
First, you need to set up default high charge value to the resource via Resource Manager.

- Set up default high charge amount



You can flush all resources high charge amount to the default value anytime.

- Set up resource high charge amount



System emails to account owner if the charge is higher than the pre-set high charge value in the resource profile.

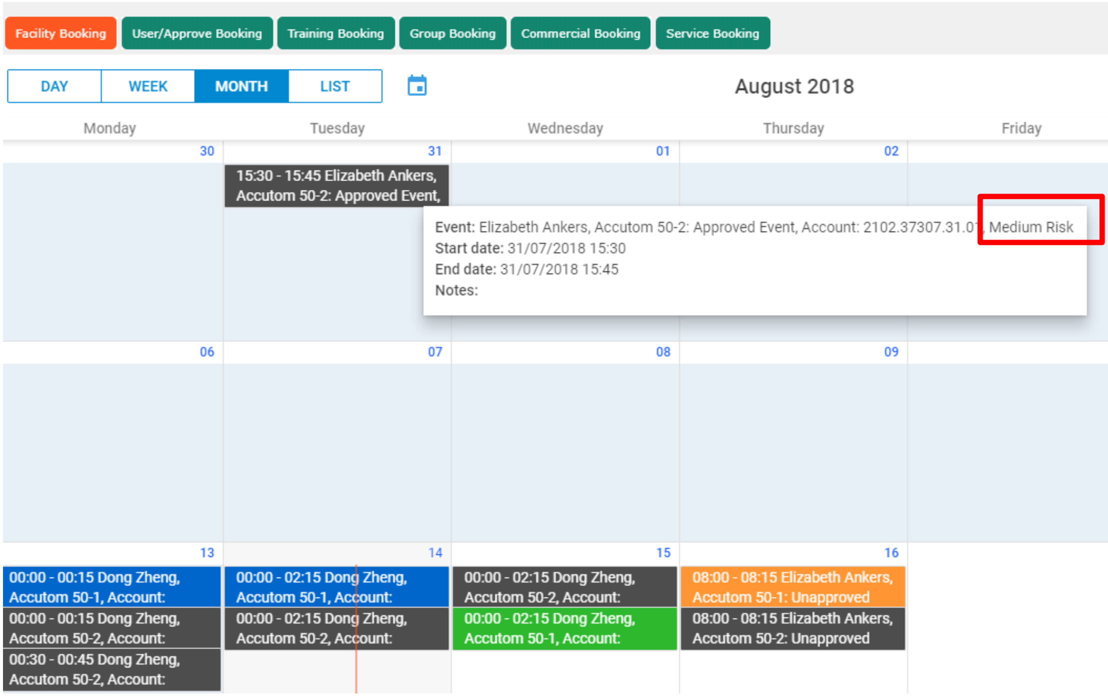
13.9 DEAKIN-IFM: Risk Level

Risk level only applies to the unapproved bookings. As normal, you need to click ***Dashboard -> Approve Bookings*** to approve or decline the unapproved bookings.

Upon opening Approve Booking tile, you see all the unapproved bookings for action. Medium Risk checkbox is added for risk level decision.

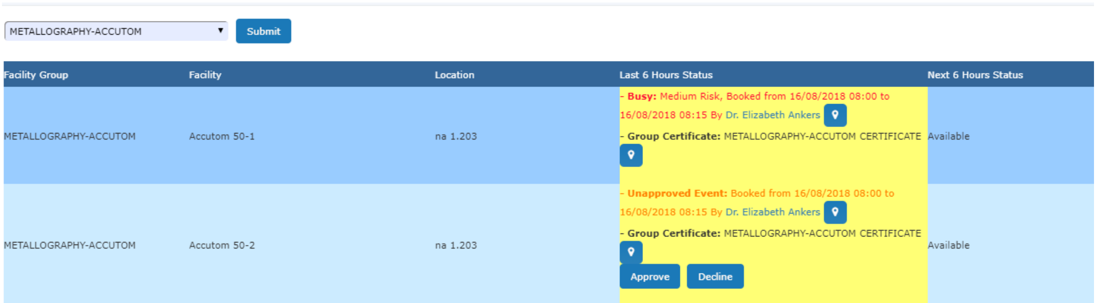
13.10 DEAKIN-IFM: Display Booking Risk Level

On all the calendars, all the approved bookings are shown the risk level if the risk level is ticked when approving.



13.11 DEAKIN-IFM: Display Risk Level in Security View

Medium risk is added to the booking details as shown in the following snapshot



This applies to both summary view and security view. If booking note is available, click on Bookmark icon to open the detail console.

13.12 DEAKIN-IFM: FAQ

1. How does the "Valid to Expiring Date" work?

When a trainer issues a certificate to a user, the system sets the expiry date from the date of issue to the last day of the valid period. For example, if the certificate valid period is set to 12 months, and the certificate is issued on 1 Jan 2014, then the expiry date is 1 Jan 2015. The certificate expires on 1 Jan 2015 regardless of user access to the system.

2. Are there any changes to the way certificates are issued?

No. However, if you wish to extend the certificate with a new expiry date, you need to cancel the current certificate, and re-issue it. The system cannot change the expiry date automatically.

3. What are the major differences between lab trainer view and security view?

On lab trainer view you can approve 'unapproved' bookings' but this cannot be done on security view.

4. What is the view upon security officer login?

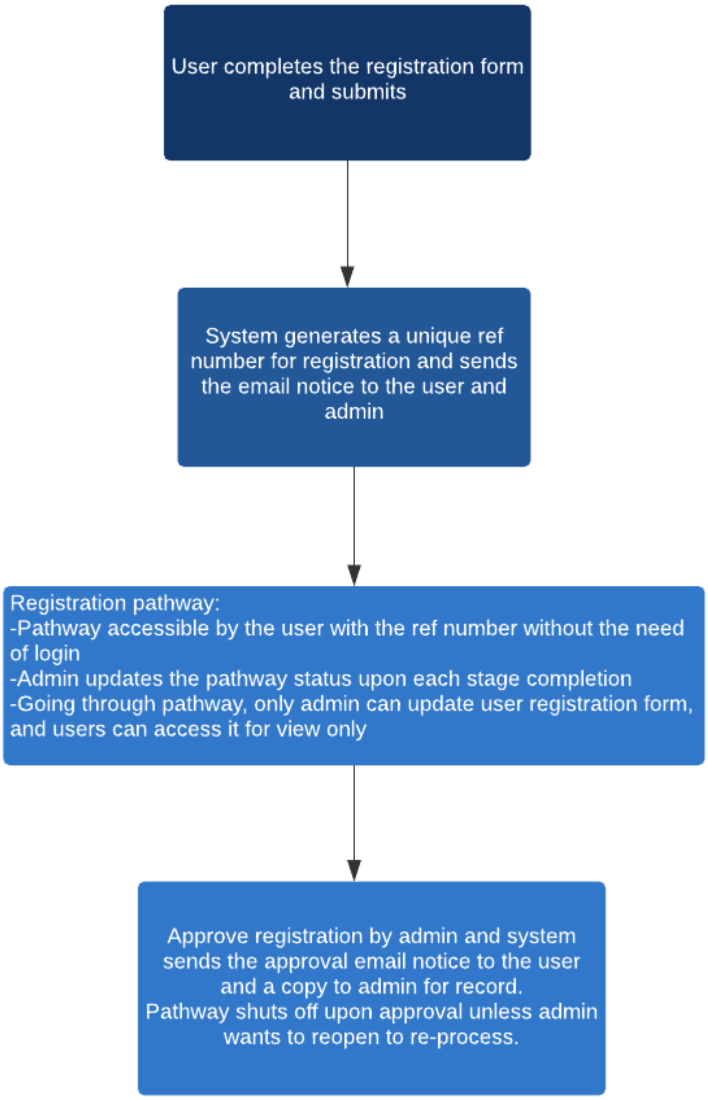
Upon login, security officer can only access the security view, through computer or mobile.

14 Appendix F – Modification for UWA-CMCA

14.1 UWA-CMCA: 2018 Requested Changes

- CMCA Online registration form: 4 pages to complete the registration form
- Registration pathway:
    - Create pathway
    - Users and staff can see the pathway status
    - Upon the completion of pathway, admin staff can approve the registration
- User access expiry date alert and action:
    - When user's access expiry date is approaching in less than two weeks, the system shows an alert on the booking page to remind the user to update the registration. Upon update, admin staff receives a notification for further action to extend the access expiry date.
    - If user access date is expired, user access to ACLS is disabled.
- Account selection for bookings
    - If the user holds more than one account, the user must choose the proper account from the dropdown list to continue. So add "Please choose the correct account for booking" to the dropdown list.
- Active users only for booking:
    - We want to set the active users for selection to all the booking tools instead of all users to the current ACLS.
- Search active users by bookings:
    - We want to be able to find out the users who booked a resource during the chosen period of time.
- Apply a special multiplexer to the standard charging rate for the off-business time
    - "We'd like to automatically apply a ¼ billing multiplier to the hours booked from the hours of 5pm to 9am next day, from the current rate applies to the bookings from 9am to 5pm"
    - "We'd like to automatically apply a ¼ billing multiplier to the hours booked, for the following hours:
        - 17.00 Monday until 9.00 Tuesday
        - 17.00 Tuesday until 9.00 Wednesday
        - 17.00 Wednesday until 9.00 Thursday
        - 17.00 Thursday until 9.00 Friday
        - And 17.00 Friday until 9.00 Monday
    - Leaving the full rate at other times, Monday to Friday 9.00 until 17.00
- Build all the reports to display usage hours and charges in terms of business time and off business time

- Flow Chart of User Registration Process:



- The addition to the Registration pathway page, so all existing users can have meetings to register for future courses. So there will be a new user meeting section and a existing user meeting section (in the existing user meeting section all CMCA users can be seen on the pull down sections) See NUM-EUM.jpg
- On the current NUM for the current modules will be changes a mock up is on the NUM.jpg. All pull down and tick boxes we can edit / change.
- Note the 1.1, 1.2 etc. is only to indicate the location on the page and should not be on the form itself.

<u>To stay the same (First section)</u>

Unapproved user
Date of New User meeting
Staff member present (text change)
Staff member present
Staff member present
Staff member present

<u>Training Plan CMCA Courses</u>

- Course Dates. (Pull down menu)
- Only the next course date
- One to one training

<u>Technique Group (pull down menu)</u>

- Optical / Confocal
- Cytometry
- XRD
- NMR
- NOTE: We can add/edit this field

<u>Instrument (pull down menu)</u>

- ALL CMCA INSTRUMENTS
- NOTE: We can add/edit this field

<u>Any special arraignments or comments (Single line)</u>

THIS SECTION IS REPEATED 3 TIMES, for different courses.

<u>Training Plan (Electron Microscopy)</u>

Heading: Training Plan for SEM

- Course Dates. (Pull down menu)
  - Only the next course date
  - One to 1 training

Instrument (Pull down menu)

- Zeiss
- Verios
- Tescan
- 2.3 Discipline: (Pull down menu)
- Biosciences
- Physical Sciences
- Geosciences

<u>Required modules (tick box, one or more can be ticked)</u>

- Imaging
- Basic EDS
- Advanced EDS

<u>Any special arraignments or comments (Single line)</u>

<u>Heading: Training Plan for TEM</u>

Course Date. (Pull down menu)

- Only the next course date
- one to 1 training

Instrument: (pull down menu)

- 2100
- Titan

Discipline: (pull down menu)

- Biosciences
- Physical Sciences
- Geosciences

<u>Any special arraignments or comments (Single line)</u>

<u>CMCA Swipe Card Access</u>

What area(s) are swipe card access required (tick all that apply) (tick box, one or more can be ticked)

- CMCA@Bayliss
- CMCA@Physics
- CMCA@Perkins
- CMCA@IOMRC

<u>Samples (No changes)</u>

- Has sufficient information been provided on the samples to be studied
  Yes/No
- Date samples are ready
- What preparation (if any) will be used- Main)
  - CMCA-Physics
  - CMCA-Bayliss
  - CMCA-Perkins
  - Sample will be prepared elsewhere
  - NOTE: We can add/edit this field
- Which preparation facilities (if any) will be used –Secondary
  - Physics Chem lab (for SEM prep)

- Physics Chem lab (for TEM prep)
- Cryo Prep
- Vacuum Oven
- Plasma Cleaner
- NOTE: We can add/edit this field.

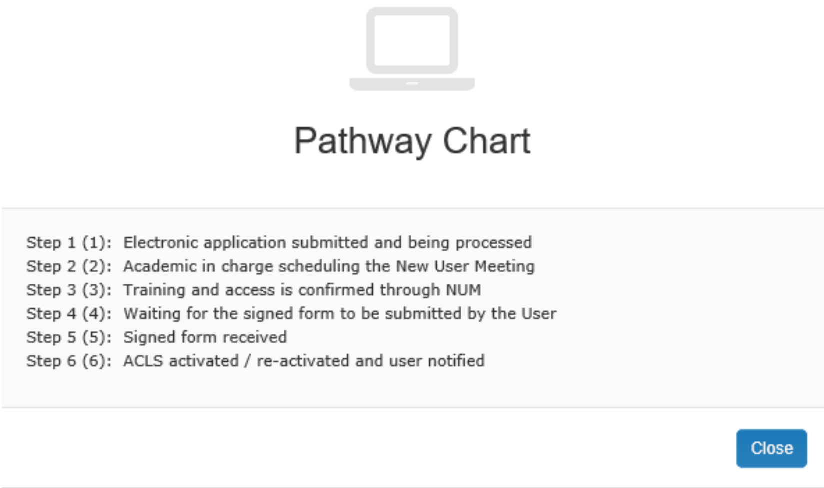
- What additional health and safety related information is required before the project can commence? (Paragraph)
- Additional comments (paragraph)

14.1.1 *UWA-CMCA:* To Set Up Registration Pathway

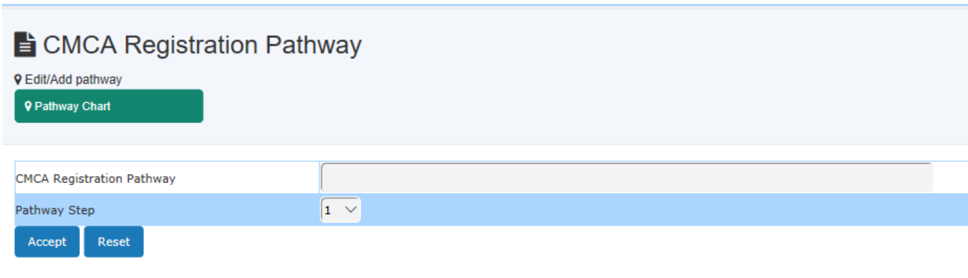
Registration pathway is a process of approving the user registration request. By default, the system has the first built-in step “Received registration”. Admin staff can amend and add the registration process steps to suit your labs.

Go to ***System Settings -> CMCA Registration Pathway.***

You can define the step number for each step. ACLS shows the step order in the pathway.



To add a new step:



You can have up to 20 steps in the registration pathway.

14.1.2 *UWA-CMCA:* To Register

According to the requirements, 4 pages of the form are defined and implemented. Users must fill the entire form to register.

Page 1: Registration

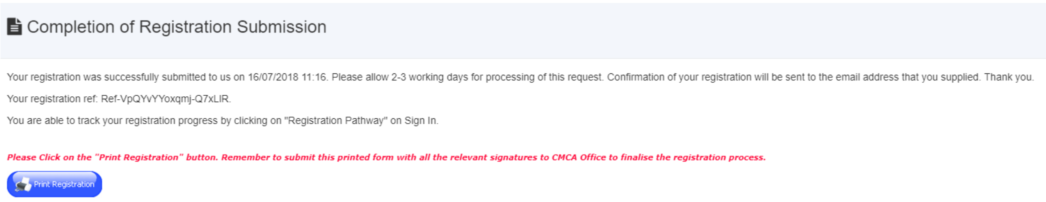
Users can save a temporary copy for later use. The system keeps the temporary copy for max 14 days.

Page 2: Project Description and Risk Assessment

Page 3: Fund Sources and Payment Details

Page 4: Terms & Conditions/Submission

Upon final submission, users can see the final page.



A short printable registration copy is available as a hard record. If a user signature is required, then it can be printed. Also the registration reference number is shown on the screen and an email notice is sent to the user for their records.

The registration reference number can be used to check the registration pathway status.

A copy of the registration notice is sent to the contact us email defined in “Configure System”. If you wish to add more staff to receive the new user registration request email, you can go to “System Settings” -> “Email Receiver” to set them up.

14.1.3 *UWA-CMCA:* Approve Registration

Due to the introduction of registration pathway, to approve the user registration, you need to go to ***User Profile -> Registration Pathway Manager*** and select the user to continue.

On the next page, you are able to see the status of each registration pathway. Until all the pathway is closed, you are able to approve the user registration.

Should you need to contact the user, simply click ***Contact User***. Should you need to access user registration form details, go to “Click to access registration form”. For admin, you can update the form details; for staff, you can view form only.

14.1.4 *UWA-CMCA:* New User Meeting (NUM)

NUM is accessible via ***Registration Pathway Manager***. To set up new meeting, click on ***New User Meeting*** or ***Existing User Meeting***.

New user meeting is for the unapproved users. Existing user meeting is for the registered and active users.

You can access each NUM records by click on User Meeting Records button. The NUM form is required to complete for new and existing user meeting. Each NUM form is required to select the user from the dropdown list.

14.1.5 *UWA-CMCA:* NUM Settings

All the related dropdown list settings can be configured ***System Settings***. Each list set up is the same way, for example, set up CMCA Swipe Cards.

14.1.6 *UWA-CMCA:* Set Up Business Time and Multiplexer

Go to ***Staff -> System Settings -> Configure System -> Business Hour Settings***.

Weekends are considered as off business time.

14.1.7 *UWA-CMCA:* Usage Reports

According to the proposal (ACLS Change of Order (201606-CMCA) – Final.pdf), booking reports and batch reports are modified to include the calculation for business hours and off business hours separately.

A new reporting platform is implemented so you can easily search (or shortlist), export/print to CSV, EXCEL, and PDF. This new technique has been applied to all the report tables.

In addition, as the multiplexer is newly added to ACLS, so if you go back to the previous report in batch report mode, then all the business time and off business time calculations are set to 0 as no data are available unless you re-run the batch reports.

14.1.8 *UWA-CMCA:* User Registration Form

User registration forms are accessible via each user profile. The new meta data form design is implemented for a polished finish.

14.1.9 *UWA-CMCA:* FAQ

1. **How can I set up "Funding Source"?**

This is available to admin only. Go to **System Settings -> Funding Sources**.

2. **How can I set up "Special Requirements"?**

This is available to admin only. Go to ***System Settings -> Special Requirements***.

3. **How can I set up "CMCA Facilities"?**

*This is available to admin only. Go to **System Settings -> CMCA Facilities**.*

4. **How can I set up "CMCA Labs"?**

*This is available to admin only. Go to **System Settings -> CMCA Labs**.*

5. **How can I set up "UWA Payment Option"?**

*This is available to admin only. Go to **System Settings -> UWA Payment Option**.*

6. **How can I set up "Non-UWA Payment Option"?**

*This is available to admin only. Go to **System Settings -> Non-UWA Payment Option**.*

7. **Why can't I approve the registration?**

The pathway needs to be closed before you can give an approval.

8. **Upon approval, can the user access the form?**

*Yes. He can go to **User Profile Manger** to access his profile, and his registration form. However, he cannot change the form details.*

14.2 UWA-CMCA: 2020 Requested Changes

- Each instrument will now be on a tier system 1, 2 or 3 and depending on what tier it is. Instruments can only be on one tier. The amount to be charged will be different for each tier.
- Users will be able to pre-purchase block of hours for instruments for each tier separately i.e. They would need to "pre-purchase a block of hours" for Tier 1 instruments, if you then want to use a Tier 2 instrument, you will need to either purchase a "pre-purchase a block of hours" for Tier 2, or do hourly rates, if you will be using < 50hrs…. or any of the possible combinations. So, any user can have multiple hours and multiple tier subscriptions.
- There will be different amounts for UWA and external rates.
- When there is 10 hours left the user and admin will be notified by email
- When users are booking an instrument, they will be able to see how many hours they have left on their subscription for each tier.
- We won't be using group subscriptions any longer.
- There will be no difference between in-hours and out of hours rates.
- We can determine and change instruments tiers, rates, and hours per block

<u>Working principles:</u>

- Instruments are grouped into Tiers depending on their complexity and operating costs.
- Options: (1) pay in arrears by the hour, or (2) pre-pay for a block of hours to get a discount.
- The larger the block you buy, the more the discount.
- Block hours can be used on any instrument within that Tier.
- Block hours must be used by a single researcher (no shared blocks).
- Blocks must be used within 12 months of purchase (to prevent large blocks being purchased in Year 1 of a multi-year project)
- You cannot upgrade from one block size to another when you run out of hours (you must buy a new block of hours)

UWA internal rates:

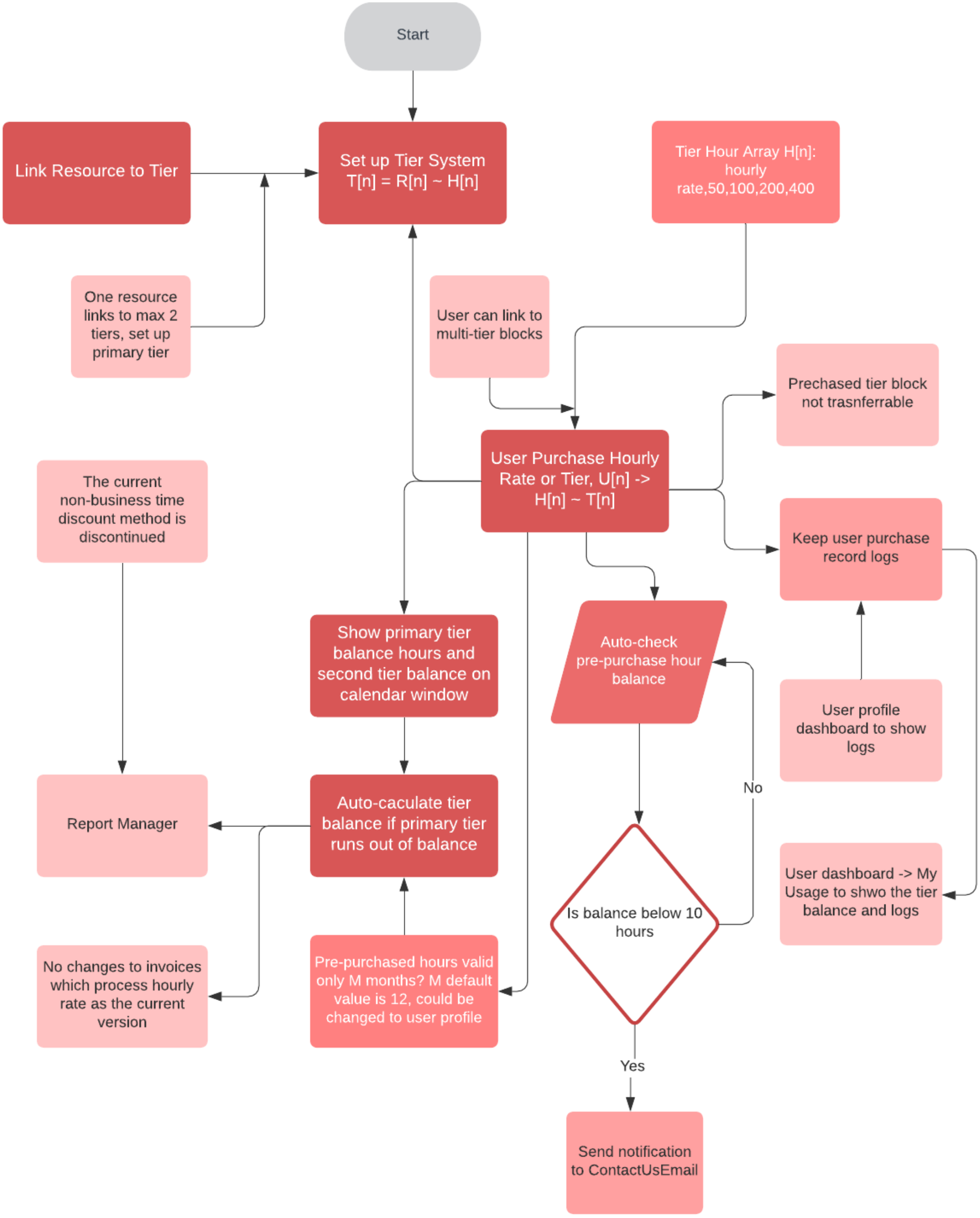
Hours	Tier 1	Tier 2	Tier 3
	Instrument A Instrument B	Instrument D Instrument F	Instrument H Instrument I
1	$x	$x	$x
50	$xx	$xx	$xx
100	$xxx	$xxx	$xxx
200	$xxxx	$xxxx	$xxxx
400	$xxxxx	$xxxxx	Not available

External rates:

- Standard 3:1 multiplier is used to reflect UWA's 2/3 contribution to CMCA operating costs.

Hours	Tier 1	Tier 2	Tier 3
	Instrument A Instrument B	Instrument D Instrument F	Instrument H Instrument I
1	$x	$x	$x
50	$xx	$xx	$xx
100	$xxx	$xxx	$xxx
200	$xxxx	$xxxx	$xxxx
400	$xxxxx	$xxxxx	Not available

Flow charts:



14.2.1 *UWA-CMCA:* Set up tiers

Go to ***Staff tab -> Utility -> Charge Category Manager***, set up multiple tiers.

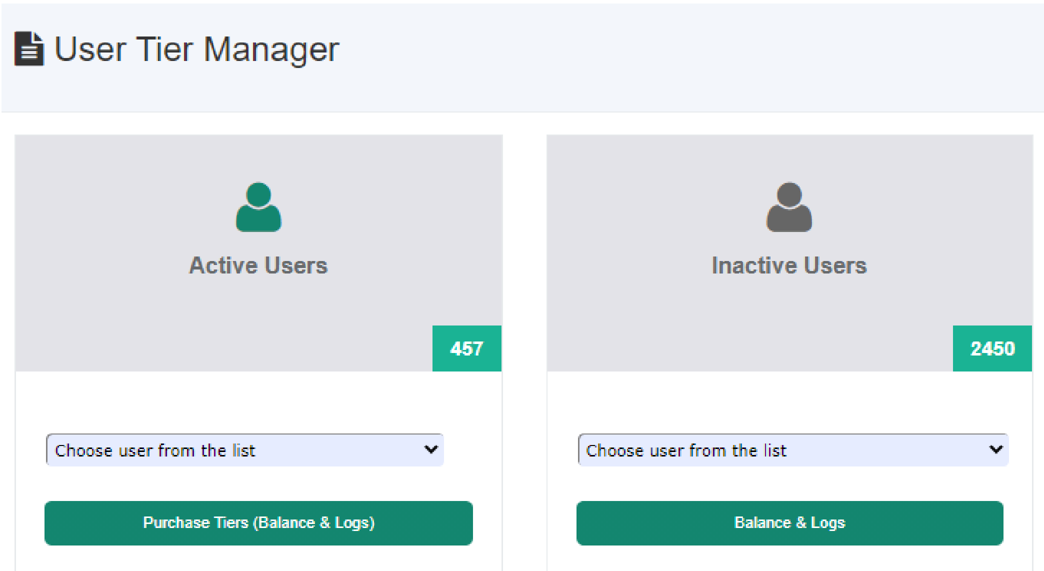
14.2.2 *UWA-CMCA:* Set up resource tier and rates

Go to ***Resource Manager -> Charge Rates*** to set up rates. Each resource is entitled to one tier only at any time. Selected tier and rates are shown in the resource list table.

...	Resource	Resource Group	Category Charge/Hour ($)
Edit Clone Archive Delete	AIMS Leica DM LB Microscope	AIMS OPTICAL MICROSCOPES	tier 1 (1 hour, internal): $1.00 tier 1 (1 hour, external): $2.00 tier 1 (50 hours, internal): $5.00 tier 1 (50 hours, external): $6.00 tier 1 (100 hours, internal): $7.00 tier 1 (100 hours, external): $8.00

14.2.3 *UWA-CMCA:* Purchase hours

Go to ***User Profile -> User Tier Manager*** to update the purchased hours by the user. In the following example, user "Aati" purchased the hours for various tiers.



Select tier and hour to purchase the hours and the current balance. The purchased records are logged for reference. The logs also include the usage hour by bookings.

14.2.4 *UWA-CMCA:* Expiry date of the purchase:

The expiry date of the purchase is set to one year. If users top up the purchase, the expiry date would be updated accordingly.

User Name	Aati, Sultan
Purchased Tier	tier 1 tier 2 tier 3
Purchased Hours	50 Hours 100 Hours 200 Hours 400 Hours
Current Purchased Tier and Hours	tier 2: 100 hours
Current Purchased Hour Balance	100.00
Current Purchased Hour Expiry Date	20/01/2022 **(Days left to expire: 364)**
Current Purchased Tier and Hours	tier 3: 200 hours
Current Purchased Hour Balance	200.00
Current Purchased Hour Expiry Date	20/01/2022 **(Days left to expire: 364)**
Current Purchased Tier and Hours	tier 1: 50 hours
Current Purchased Hour Balance	69.00
Current Purchased Hour Expiry Date	21/01/2022 **(Days left to expire: 364)**

14.2.5 *UWA-CMCA:* Charge by hour or by tier:

By default, ACLS runs charge by hour to all the users, by doing so, users can continue making bookings as usual. Once charge by tier is switched on for the user, the user must have the balance hours in the purchased tiers.

User Name	Category	Charge By
Aati, Sultan	tier 1	by hour by tier
Aati, Sultan	tier 2	by hour by tier
Aati, Sultan	tier 3	by hour by tier

14.2.6 *UWA-CMCA:* Charge by internal rate or external rate:

By default, ACLS enables the internal rate to all the users. Admin is at position to enable the rate selection for resource vs user.

Charge Rate
● internal ○ external
● internal ○ external
○ internal ● external

User Name	Category	Charge By	Charge Rate
Aati, Sultan	tier 1	○ by hour ● by tier	● internal ○ external
Aati, Sultan	tier 2	○ by hour ● by tier	● internal ○ external
Aati, Sultan	tier 3	○ by hour ● by tier	○ internal ● external

14.2.7 *UWA-CMCA:* Balance logs for the purchased tiers:

Full log snapshot.

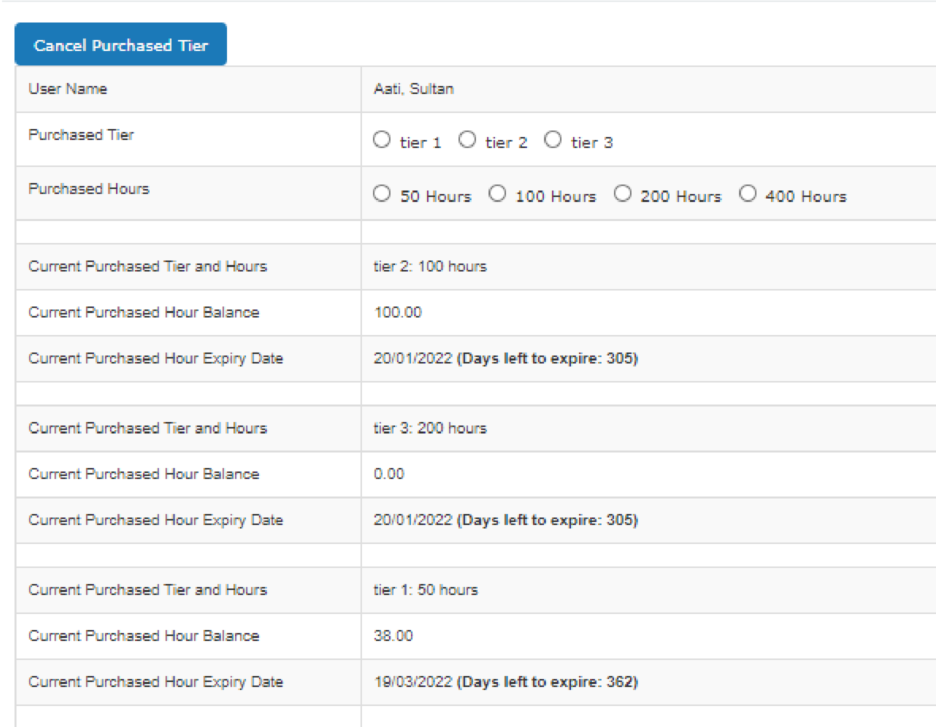
User Name	Purchased Tier	Purchased Hours	Balance Hours	Updated By	Updated Time
Dong Zheng			49.00		
Dong Zheng	tier 3	200	200.00	Dong Zheng	28/12/2020 09:18:53
Dong Zheng	tier 2	100	100.00	Dong Zheng	28/12/2020 09:18:48
Dong Zheng	tier 1	50	50.00	Dong Zheng	28/12/2020 09:18:42

Booking Resource	Booking Tier	Booking Start Time	Booking End Time	Booking Hours	Booking Ref	Booking Status
Perkins Nikon A1 Si Confocal	tier 1	07/01/2021 09:00:00	07/01/2021 10:00:00	1.00	1609107546717	

At this page, you can define the booking charges by hour o by tier, apply either internal rate or external rate. By default, settings go to by hour and internal rate so this won't stop users to make bookings even if they haven't purchased any hours.

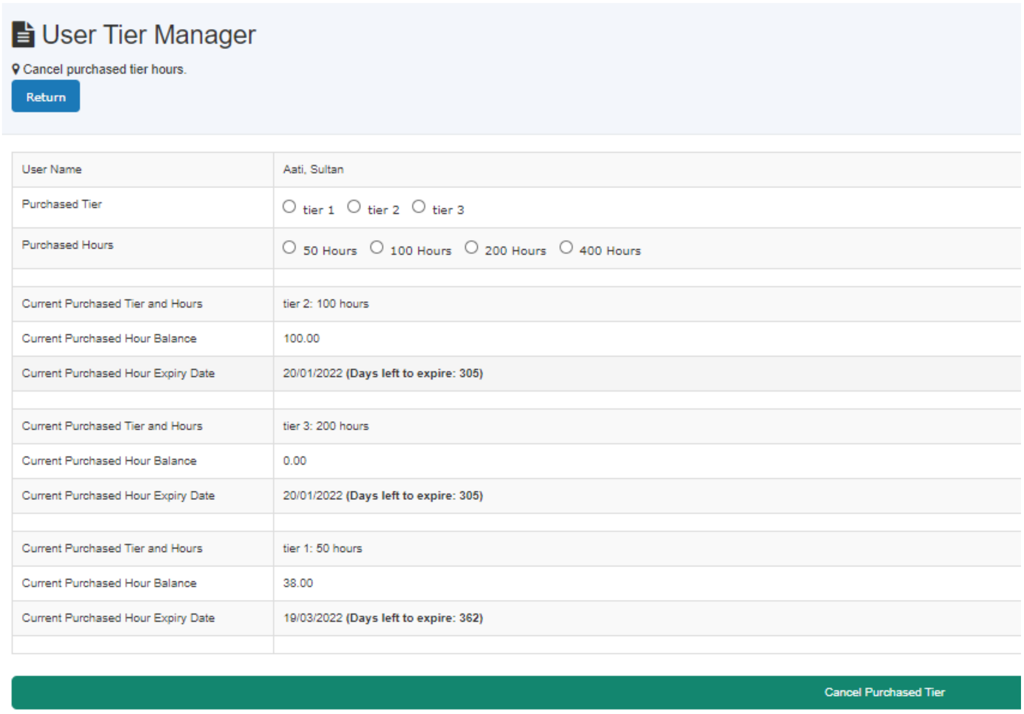
14.2.8 *UWA-CMCA:* Cancel the purchased hours:

Admin could cancel the purchased hours anytime, however, the balance hours will stay at Zero hours if the cancelled hours are more than balanced hours.



Cancel Purchased Tier

User Name	Aati, Sultan
Purchased Tier	○ tier 1 ○ tier 2 ○ tier 3
Purchased Hours	○ 50 Hours ○ 100 Hours ○ 200 Hours ○ 400 Hours
Current Purchased Tier and Hours	tier 2: 100 hours
Current Purchased Hour Balance	100.00
Current Purchased Hour Expiry Date	20/01/2022 **(Days left to expire: 305)**
Current Purchased Tier and Hours	tier 3: 200 hours
Current Purchased Hour Balance	0.00
Current Purchased Hour Expiry Date	20/01/2022 **(Days left to expire: 305)**
Current Purchased Tier and Hours	tier 1: 50 hours
Current Purchased Hour Balance	38.00
Current Purchased Hour Expiry Date	19/03/2022 **(Days left to expire: 362)**



User Tier Manager

Cancel purchased tier hours.

Return

User Name	Aati, Sultan
Purchased Tier	○ tier 1 ○ tier 2 ○ tier 3
Purchased Hours	○ 50 Hours ○ 100 Hours ○ 200 Hours ○ 400 Hours
Current Purchased Tier and Hours	tier 2: 100 hours
Current Purchased Hour Balance	100.00
Current Purchased Hour Expiry Date	20/01/2022 **(Days left to expire: 305)**
Current Purchased Tier and Hours	tier 3: 200 hours
Current Purchased Hour Balance	0.00
Current Purchased Hour Expiry Date	20/01/2022 **(Days left to expire: 305)**
Current Purchased Tier and Hours	tier 1: 50 hours
Current Purchased Hour Balance	38.00
Current Purchased Hour Expiry Date	19/03/2022 **(Days left to expire: 362)**

Cancel Purchased Tier

In purchased logs, the cancelled purchased hours are marked at minus.

Show 500 entries

Showing 1 to 115 of 115 entries

User Name	Purchased Tier	Purchased Hours	Balance Hours
Dong Zheng			38.00
Dong Zheng			36.00
Dong Zheng			38.00
Dong Zheng			41.00
Dong Zheng	tier 1	-50	43.00
Dong Zheng	tier 1	50	93.00
Dong Zheng			43.00

14.2.9 *UWA-CMCA:* Reset balance hours:

Admin could reset balance hours anytime, please execute the option cautiously.

Purchased Tier	Current Purchased Hour Balance	Reset
Category 2	355.00	Reset Tier Balance to Zero

14.2.10 *UWA-CMCA:* Offset balance hours:

Admin could offset balance hours anytime.

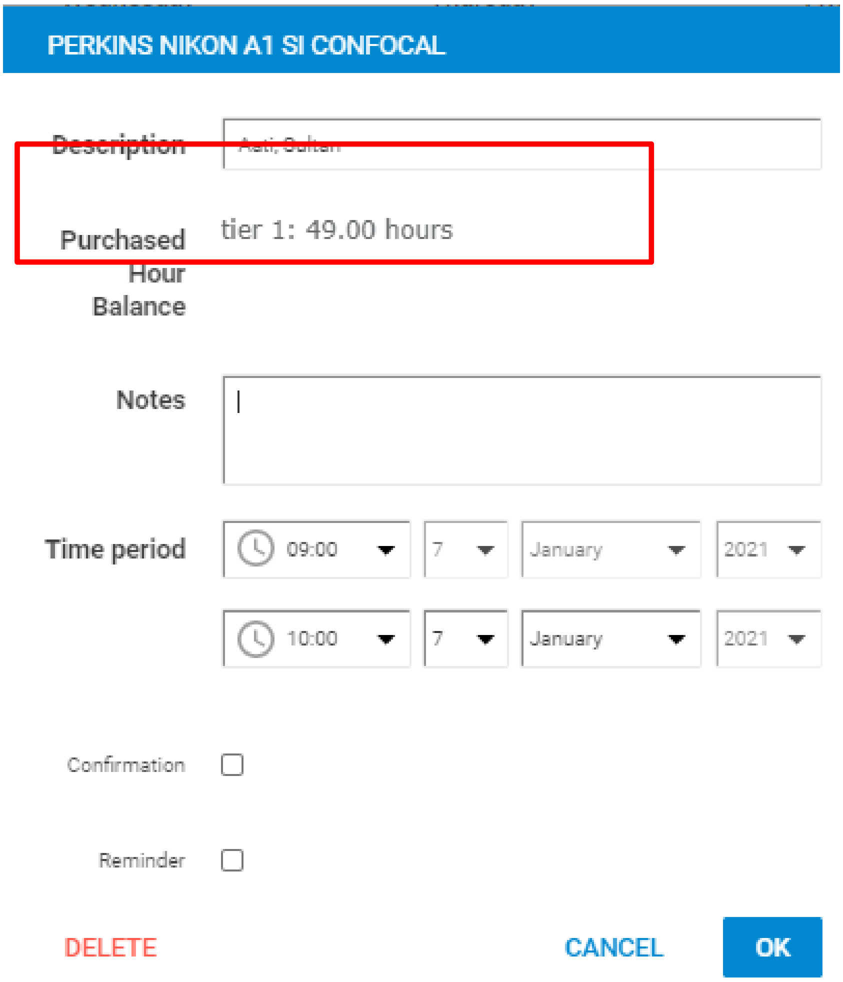
	Offset
	Enter offset hours to change tier balance (+/-): Submit

14.2.11 *UWA-CMCA:* Alternative ways to check balance and logs

Users can check the purchased hours balance and logs via My Profile. Staff can user's balance and logs at user profile page.

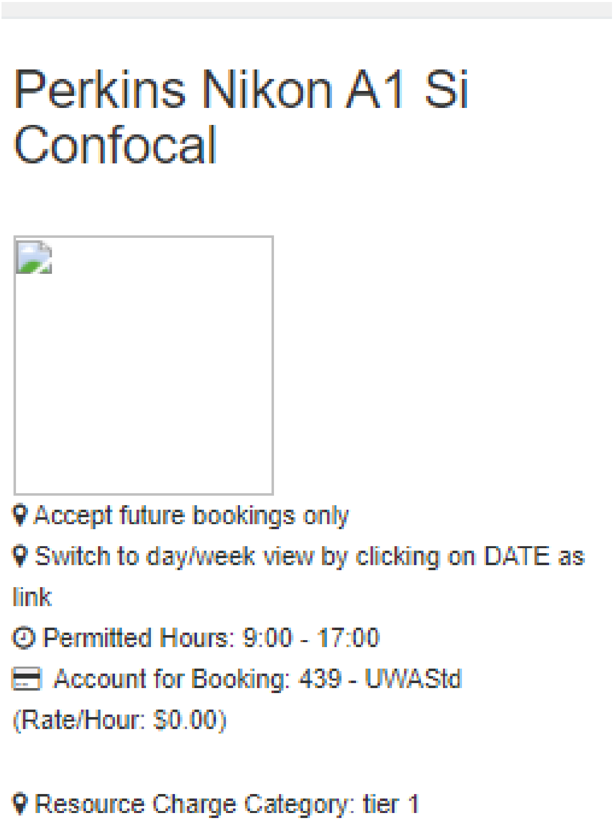
14.2.12 *UWA-CMCA:* Booking with tiers – operation calendar

While making the bookings, booking lightbox window indicates the tier and balance as shown here.

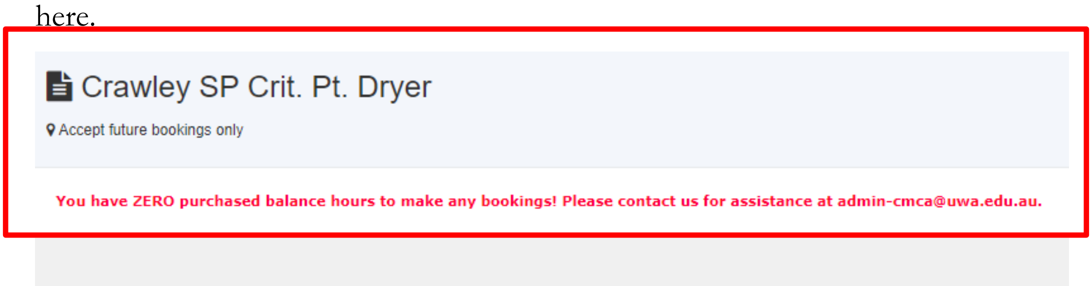


The booking hours are deducted from the balance each time, and recovered to balance if the booking is cancelled.

Resource tier is displayed on the calendar page for information.



If user has no balance remaining, he won't be able to book the resource as indicated here.

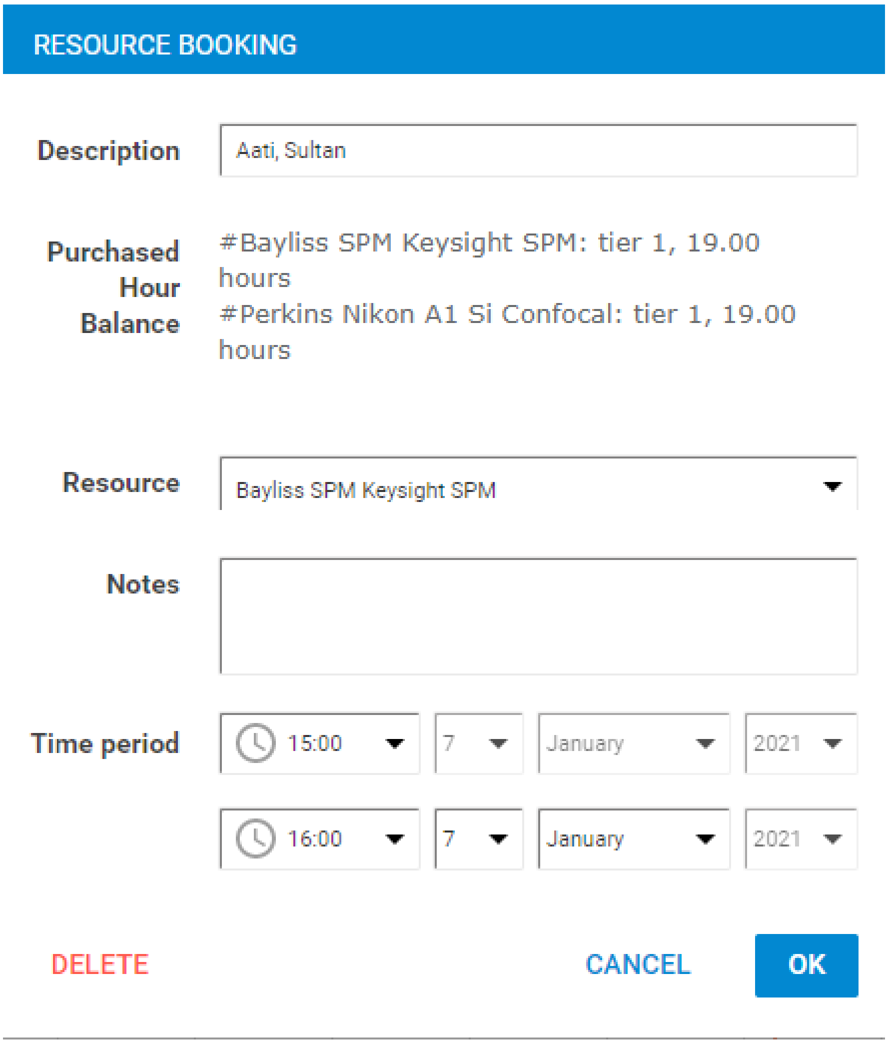


14.2.13 *UWA-CMCA:* Booking with tiers – user and training calendar

Once the tier is enabled to the user, staff could book for the user and also make training bookings for the user, ACLS deducts the balance from the purchased automatically.

14.2.14 *UWA-CMCA:* Booking with tiers – timeline calendar

For timeline calendar, the tier and purchased hour balance is dynamically displayed for all resources on the calendar, that is different from the single resource operation calendar. No bookings can be accepted if the balance is zero, or less than the booking hours.



14.2.15 *UWA-CMCA:* Booking cancellation

Once the tier is enabled to the user, the cancelled booking hours are restored to the balance automatically.

14.2.16 *UWA-CMCA:* Training Bookings

Training booking calendar will not process with the user purchased hours and tiers.

14.2.17 *UWA-CMCA:* Retrospective Bookings

Go to Data logbook manager to edit the retrospective bookings made in the past. The purchased hours are handled accordingly.

14.2.18 *UWA-CMCA:* Batch report

Batch reports are run with the automated calculation for the bookings charge by hour and charge by tier. The tiers and rates are included in the reports.

Charge Category	Charge Rate ($)	Balance Hours	Booked Hours	Charges ($)
tier 1: 50hours (internal)	4.00	8.00	8.00	32.00
tier 1: 50hours (internal)	3.00	5.00	5.00	15.00

Previous 1 Next

14.2.19 *UWA-CMCA:* Registration page

The following changes are made upon the request. The relevant changes also apply to the registration forms in user pathway manager and user profile manager.

- On Page 1 Remove totally

Are you currently a registered user of the centre facilities?	◯ I am currently a registered user ◯ No, I am a new user of CMCA facilities ◯ No, I was registered in the past but am not currently registered

This will remove the default payment option of $275 for all new users

- On Page 3

Payment details (for UWA users)

Change the text to Payment details (internal)

- Also, on Page 3

Payment details (non-UWA and WA Research Partner users; incl. Murdoch, ECU, Curtin and Notre Dame)

Change text to Payment details (associate)

14.3 UWA-CMCA: 2022 Requested Changes

- Registration pages: all pages
- New and existing user meetings module

14.3.1 UWA-CMCA: Registration pages

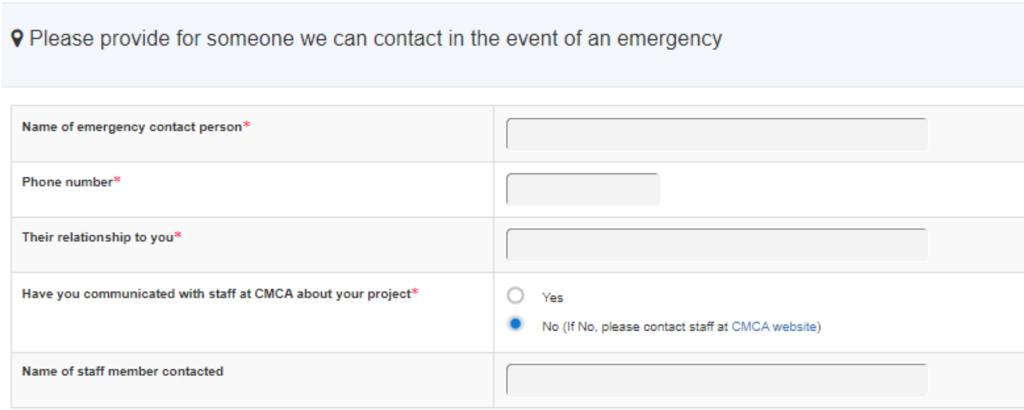
- Page 1: changes are made in accordance with the change proposal. Save as a copy stays as what it is.

Before continuing to the Registration page, ensure you have the following information on hand:

- ✔ Contact details
- ✔ Your supervisor name and contact details (students and visitors only)
- ✔ Emergency contact details
- ✔ A short research project outline (to help CMCA understand your microscopy needs)

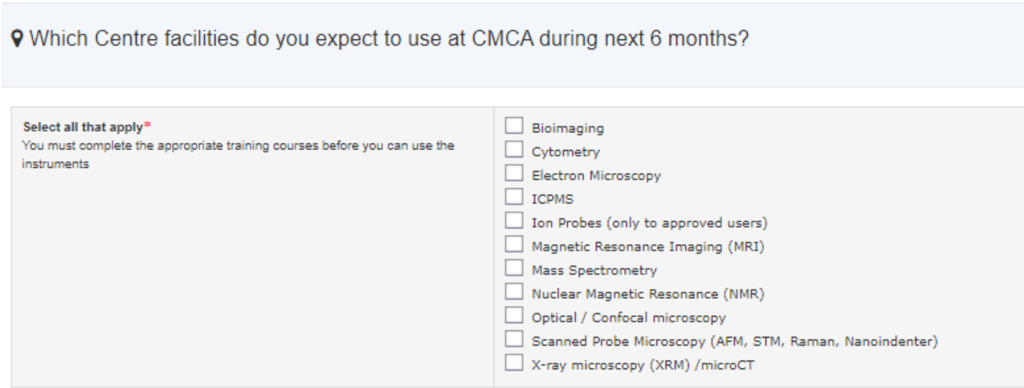
Retrieve the saved copy of registration document

Title	
Given name*	
Family name*	
Preferred Name	
Project ID	
UWA Student/Staff/Visitor Number or institute student/staff number	(leave blank if visitors card has not been issued)
Email*	(UWA or affiliate email address only)
Retype email*	
Login password*	
Retype login password*	
School/organization*	Choose school/organization from the list
Work phone*	(digits Only)
Mobile phone	
Work address UWA include MBDP	



Please provide for someone we can contact in the event of an emergency

Name of emergency contact person*	
Phone number*	
Their relationship to you*	
Have you communicated with staff at CMCA about your project*	Yes No (If No, please contact staff at CMCA website)
Name of staff member contacted	



Which Centre facilities do you expect to use at CMCA during next 6 months?

Select all that apply* You must complete the appropriate training courses before you can use the instruments	Bioimaging Cytometry Electron Microscopy ICPMS Ion Probes (only to approved users) Magnetic Resonance Imaging (MRI) Mass Spectrometry Nuclear Magnetic Resonance (NMR) Optical / Confocal microscopy Scanned Probe Microscopy (AFM, STM, Raman, Nanoindenter) X-ray microscopy (XRM) /microCT

- Page 2: changes are made in accordance with the change proposal. Save as a copy stays as what it is.

Project information (Please ensure all applicable fields are filled in)

Type of researcher* Required	Undergra. Student
Expected project completion date*	06/03/2022
Project category*	Biomedical Sciences
Project title*	
Project description* Required - Enter a description of your project relevant to the work to be undertaken at CMCA	

Principal supervisor details (students ONLY)

Title	
Given name	
Family name	
Email Address	

- Page 3: changes are made in accordance with the change proposal. Save as a copy stays as what it is.

Fund sources (please ensure all applicable fields are filled in)

Are you or do you intend to use another AMMRF node/facility?*	No
If yes, please specify (AMMRF Nodes)*	
Please specify all sources of funding*	☐ ------------------------------ ☐ 01-NHMRC: Project Grant ☐ 02-NHMRC: COE ☐ 03-NHMRC Development Grant ☐ 04-NHMRC Program Grant ☐ 05-NHMRC Fellowship ☐ 06-Targetted Government Funded Program ☐ 07-Trust or Scholarships (generic) ☐ 08-ARC DP ☐ 09-ARC COE ☐ 10-ARC LP ☐ 11-ARC Special Research Initiative ☐ 12-Internal University Grant (incl. UPA) ☐ 13-Industry Sponsored. Please specify the name of the company ☐ 14-Australian Postgrad Stipend ☐ 15-Self-Funded ☐ 16-Multiple Grants ☐ 17-Medical Research Institute ☐ 18-Co-operative Research Centre ☐ 19-Other. Please specify ☐ 20-Funding from an external university ☐ 21-NHMRC: Synergy ☐ 22-NHMRC: Partnership Projects ☐ 23-NHMRC: Other ☐ 24-NHMRC: Ideas Grants ☐ 25-ARC: DECRA ☐ 26-ARC: Future Fellowship ☐ 27-ARC: Industrial Transformation Hub/Centre ☐ 28-ARC: Other ☐ Please provide as many details as you can - i.e. names of the grants
Please specify the name of the company If specified 13 or 19	

Membership Fees

Options* select appropriate	○ UWA Honors $200 ○ UWA Others $1000

Select payment option

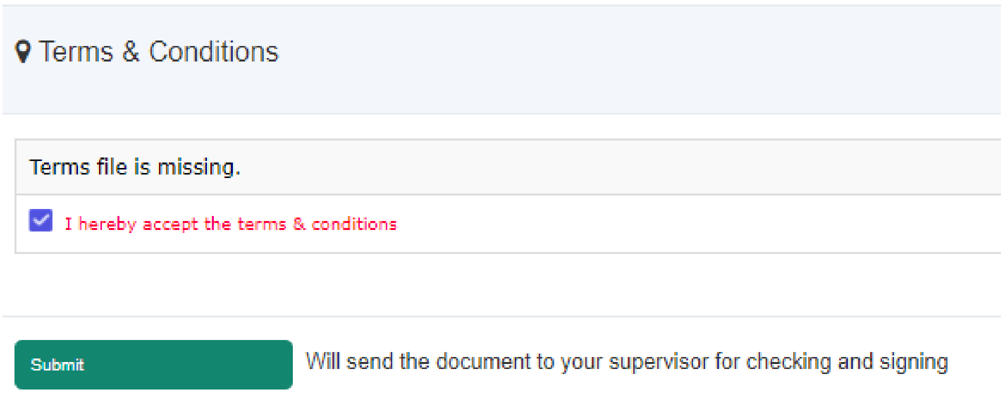
*	○ Payment details (internal) ○ Payment details (associate)

*: required fields

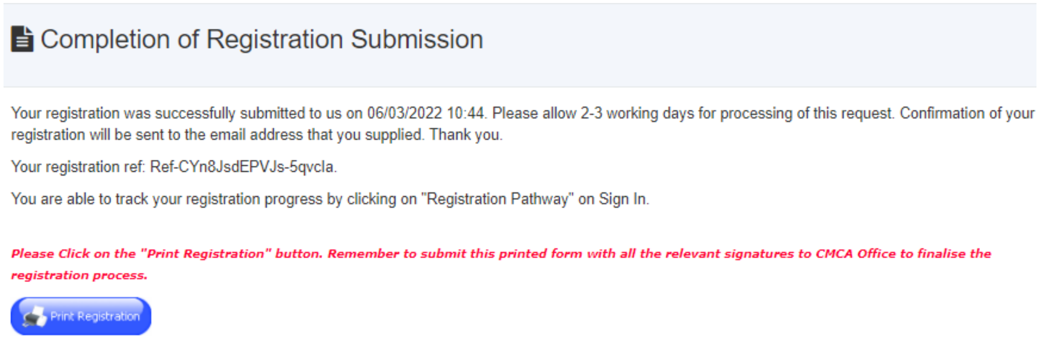
Continue

Save a Copy Will save the incomplete registration document for 14 days to allow further details to be completed after that time it is completely deleted

- Page 4: remain the same.



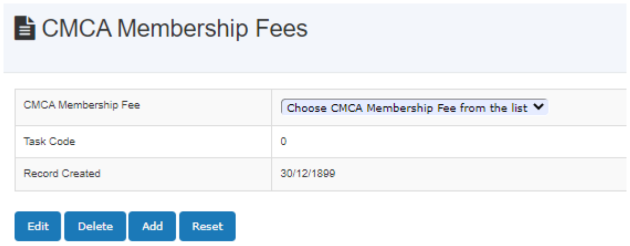
- Upon submission



- Printable copy: changes are made according to the CMCA registration pages.

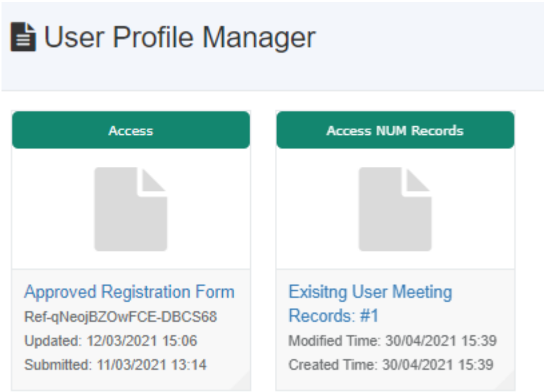
14.3.2 UWA-CMCA: Set up membership fees

Admin can set up and change membership fees at System Settings.



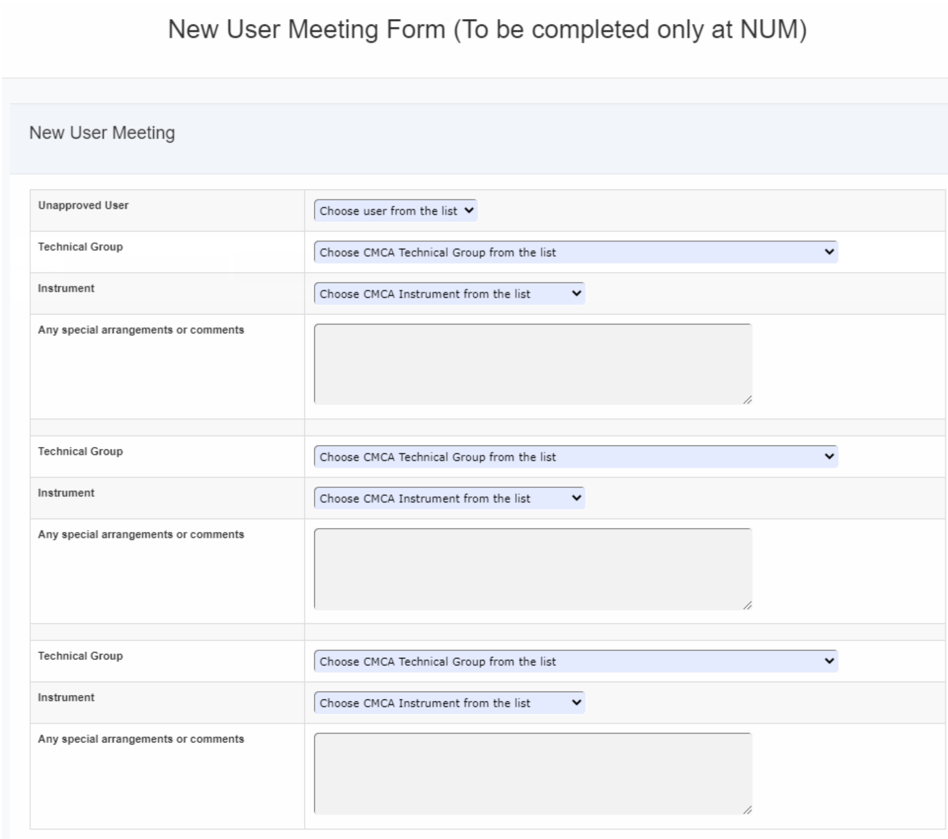
14.3.3 UWA-CMCA: User profile: Access filled-up registration form

Admin can access and edit user filled-up registration form



14.3.4 *UWA-CMCA: New user meeting*

User meeting module is overhauled for CMCA changes. Go to ***Staff tab -> Registration Pathway Manager*** to set up new user meeting for newly registered users (whom haven't been approved yet).



Training Plan for SEM

Instrument 1	Choose CMCA Instrument from the list
Instrument 2	Choose CMCA Instrument from the list
Discipline	Choose CMCA Discipline from the list
Required Modules, Tick All that apply	☐ CryoSEM ☐ FIB-SEM ☐ Imaging ☐ SEM-EDS
Any special arrangements or comments	

Training Plan for TEM

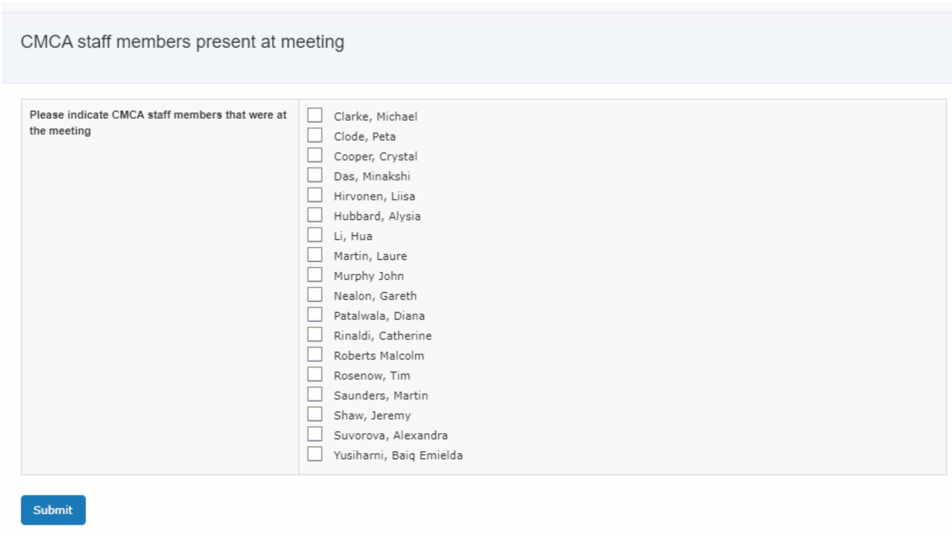
Instrument 1	Choose CMCA Instrument from the list
Instrument 2	Choose CMCA Instrument from the list
Discipline	Choose CMCA Discipline from the list
Required Modules, Tick All that apply	☐ CryoTEM ☐ Crystallography ☐ Imaging ☐ Microanalysis
Any special arrangements or comments	

CMCA Swipe Card Access

What area(s) are swipe card access required (tick all that apply)	☐ CMCA - Bayliss Building ☐ CMCA - Harry Perkins Medical Research Bld. ☐ CMCA - Physics Building

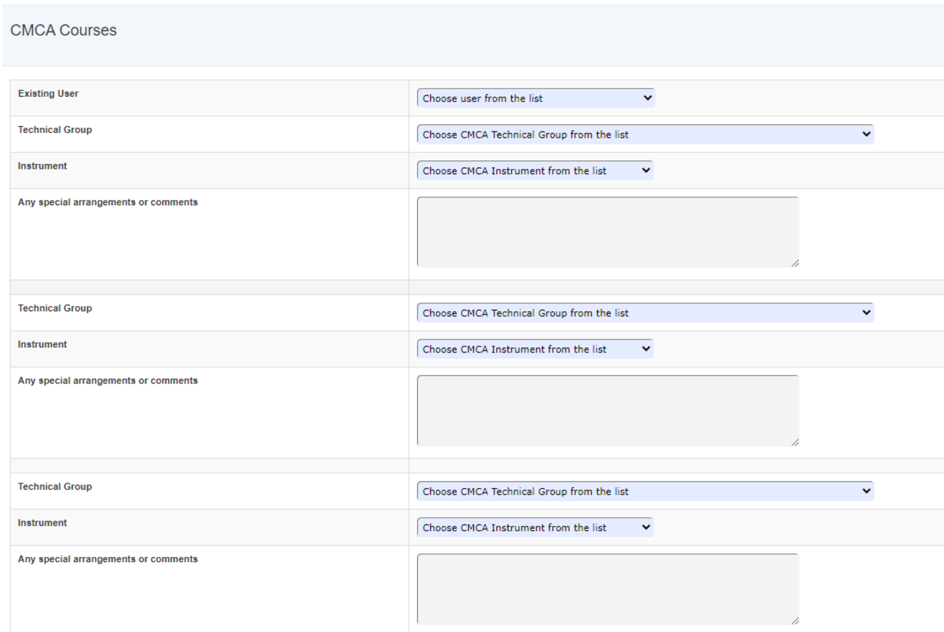
Samples

Has sufficient information been provided on the samples to be studied	No
Date the samples will be ready for analysis	23/05/2022
Which preparation facilities (if any) will be used – Main	Choose CMCA Preparation Facility - Main - from the list
Which preparation facilities (if any) will be used – Secondary	Choose CMCA Preparation Facility - Secondary - from the list
What additional health and safety related information is required before the project can commence?	
Additional comments	



14.3.5 *UWA-CMCA: Existing user meeting*

User meeting module is overhauled for CMCA changes. Go to ***Staff -> Registration Pathway Manager*** to set up existing user meeting for active users.



Training Plan for TEM

Instrument 1	Choose CMCA Instrument from the list
Instrument 2	Choose CMCA Instrument from the list
Discipline	Choose CMCA Discipline from the list
Required Modules, Tick All that apply	☐ CryoTEM ☐ Crystallography ☐ Imaging ☐ Microanalysis
Any special arrangements or comments	

CMCA Swipe Card Access

What area(s) are swipe card access required (tick all that apply)	☐ CMCA - Bayliss Building ☐ CMCA - Harry Perkins Medical Research Bld. ☐ CMCA - Physics Building

Samples

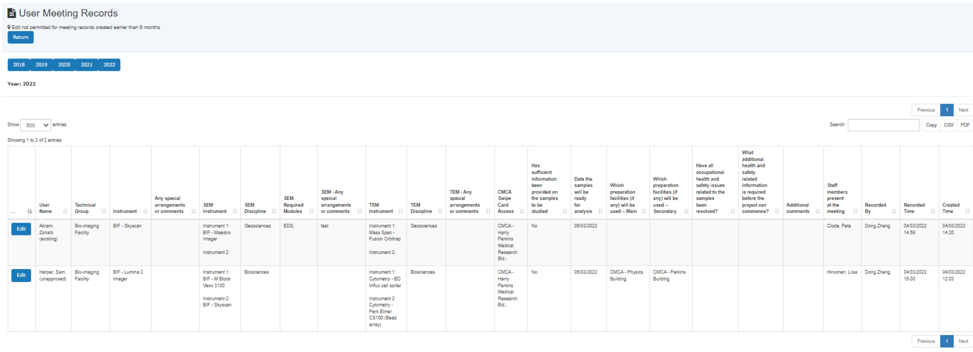
Has sufficient information been provided on the samples to be studied	No
Date the samples will be ready for analysis	23/05/2022
Which preparation facilities (if any) will be used -- Main	Choose CMCA Preparation Facility - Main - from the list
Which preparation facilities (if any) will be used -- Secondary	Choose CMCA Preparation Facility - Secondary - from the list
What additional health and safety related information is required before the project can commence?	
Additional comments	

CMCA staff members present at meeting

Please indicate CMCA staff members that were at the meeting	☐ Clarke, Michael ☐ Clode, Peta ☐ Cooper, Crystal ☐ Das, Minakshi ☐ Hirvonen, Liisa ☐ Hubbard, Alysia ☐ Li, Hua ☐ Martin, Laure ☐ Murphy John ☐ Nealon, Gareth ☐ Patalwala, Diana ☐ Rinaldi, Catherine ☐ Roberts Malcolm ☐ Rosenow, Tim ☐ Saunders, Martin

14.3.6 UWA-CMCA: User meeting records

User meeting records are fully recorded and accessible by clicking ***User Meeting Records*** button. Admin staff could edit the record if required.



The records are sorted by year to facilitate the record summary.

14.3.7 UWA-CMCA: User profile: Access meeting records

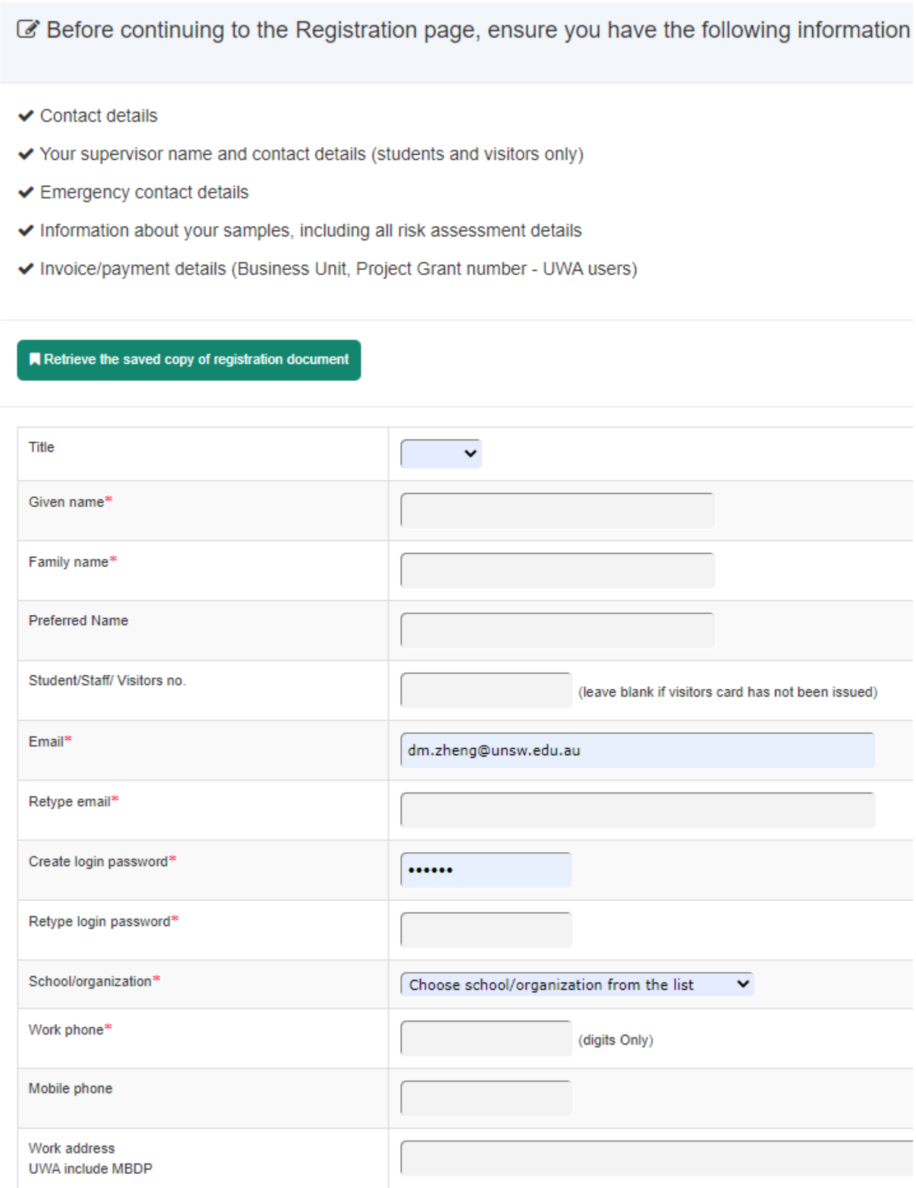
Go to ***Staff -> Users -> User Profile Manager*** to access the meeting records. Printable copy is available as well.

15 Appendix G – Modification for UWA-RIMS

15.1 UWA-RIMS: 2022 Requested Changes

15.1.1 UWA-RIMS: Registration pages

- Page 1: changes are made in accordance with the change proposal. Save as a copy stays as what it is.

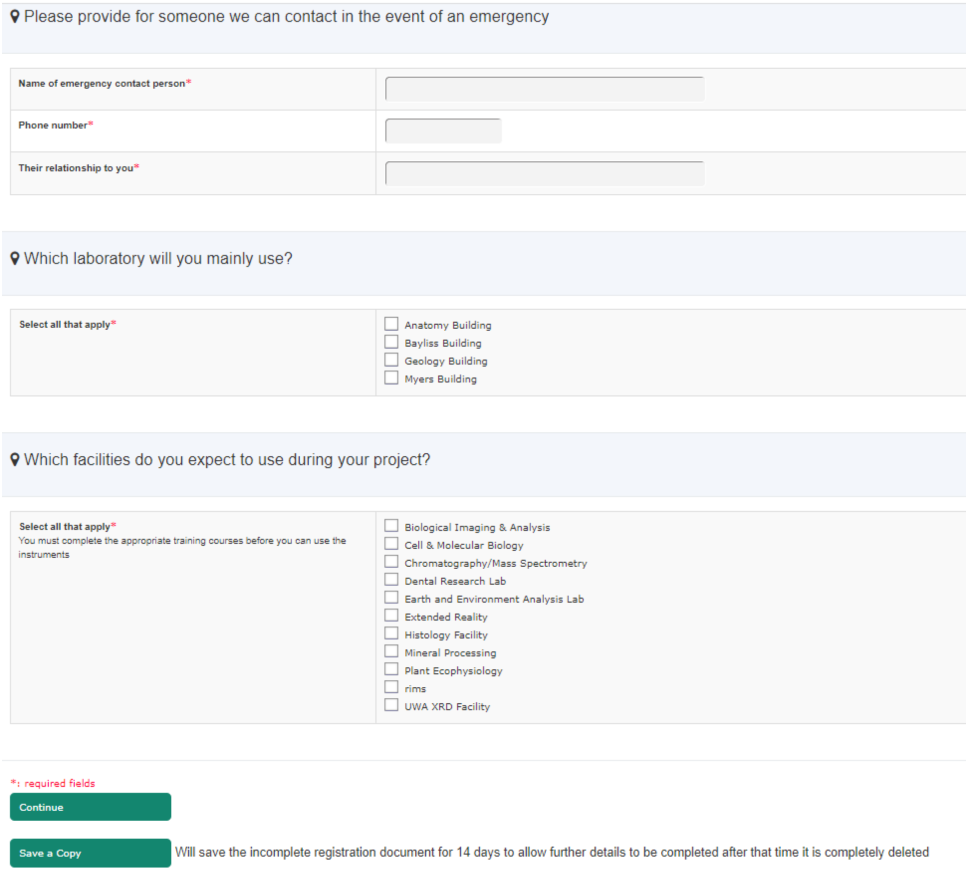


Before continuing to the Registration page, ensure you have the following information

- ✔ Contact details
- ✔ Your supervisor name and contact details (students and visitors only)
- ✔ Emergency contact details
- ✔ Information about your samples, including all risk assessment details
- ✔ Invoice/payment details (Business Unit, Project Grant number - UWA users)

Retrieve the saved copy of registration document

Title	
Given name*	
Family name*	
Preferred Name	
Student/Staff/ Visitors no.	(leave blank if visitors card has not been issued)
Email*	dm.zheng@unsw.edu.au
Retype email*	
Create login password*	••••••
Retype login password*	
School/organization*	Choose school/organization from the list
Work phone*	(digits Only)
Mobile phone	
Work address UWA include MBDP	



Please provide for someone we can contact in the event of an emergency

Name of emergency contact person*	
Phone number*	
Their relationship to you*	

Which laboratory will you mainly use?

Select all that apply*	☐ Anatomy Building ☐ Bayliss Building ☐ Geology Building ☐ Myers Building

Which facilities do you expect to use during your project?

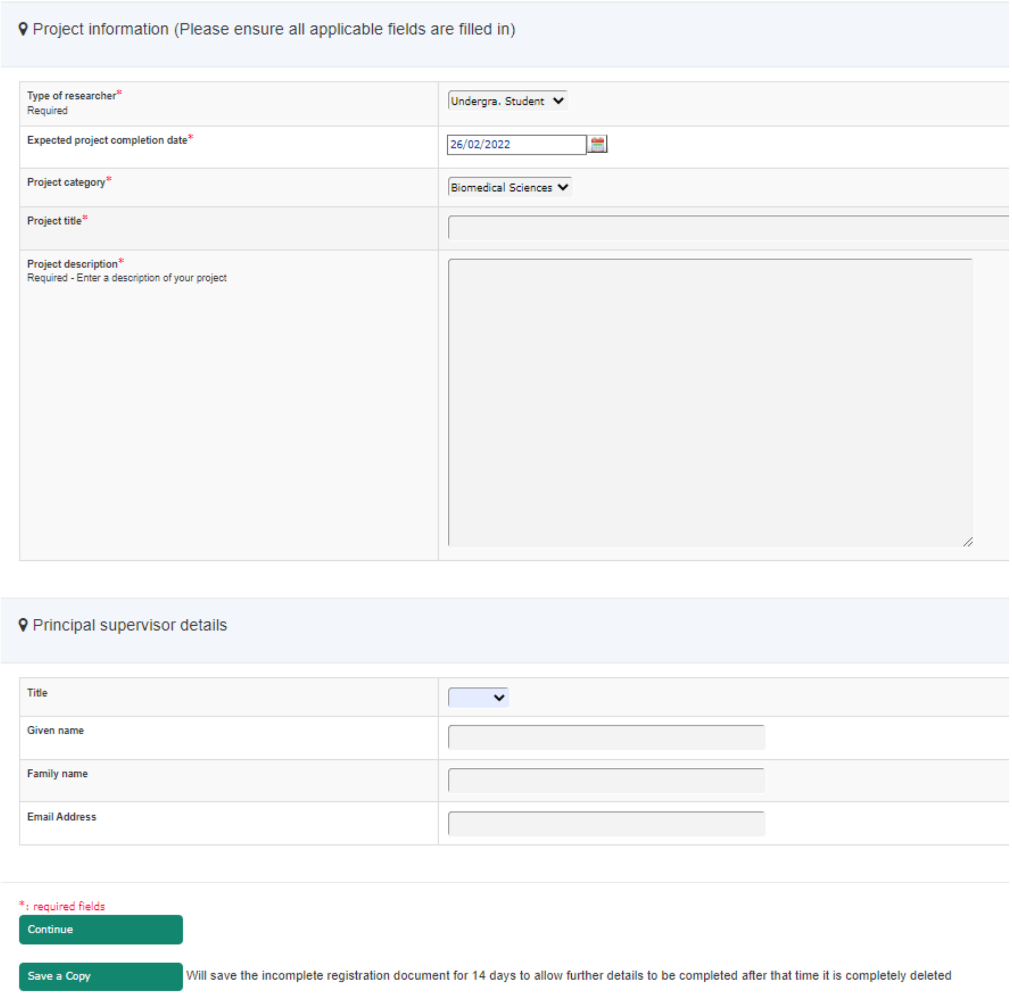
Select all that apply* You must complete the appropriate training courses before you can use the instruments	☐ Biological Imaging & Analysis ☐ Cell & Molecular Biology ☐ Chromatography/Mass Spectrometry ☐ Dental Research Lab ☐ Earth and Environment Analysis Lab ☐ Extended Reality ☐ Histology Facility ☐ Mineral Processing ☐ Plant Ecophysiology ☐ rims ☐ UWA XRD Facility

*: required fields

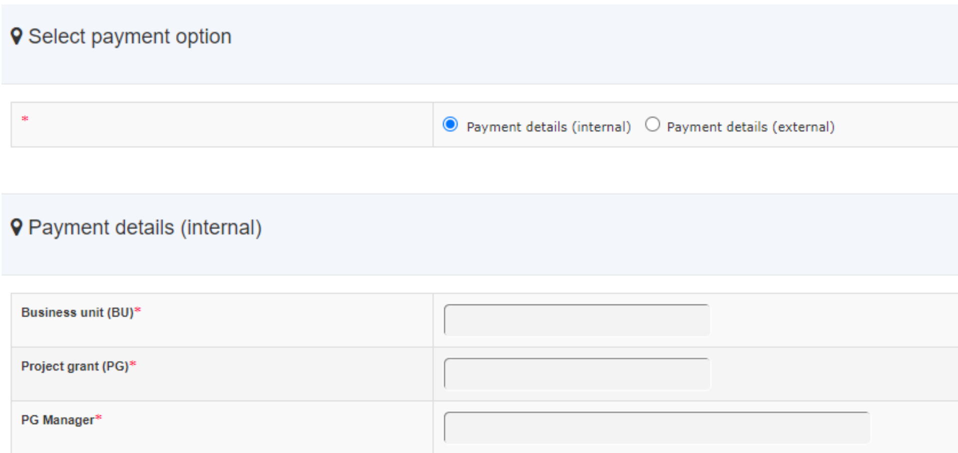
Continue

Save a Copy Will save the incomplete registration document for 14 days to allow further details to be completed after that time it is completely deleted

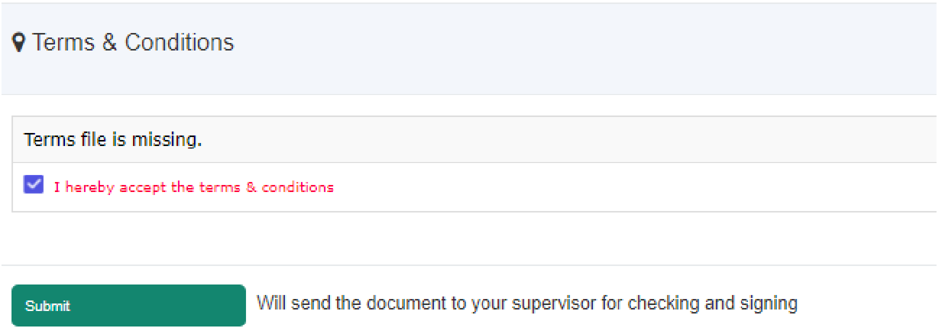
- Page 2: changes are made in accordance with the change proposal. Save as a copy stays as what it is.



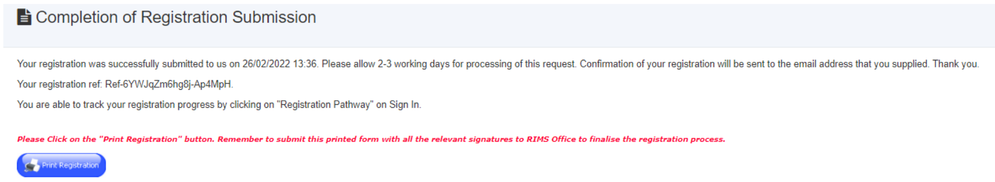
- Page 3: changes are made in accordance with the change proposal. Save as a copy stays as what it is.



- Page 4: remain the same.



- Upon submission, RIMS office is nominated. Email notifications go to the new user, facility contact email address and nominated staff via email receiver notification in System Settings



- Printable copy: changes are made according to the RIMS registration pages.

15.1.2 UWA-RIMS: Instrument (Resource) charging

Please refer to ACLS Complete Guide for the details of category booking hour charging and configurations.

15.1.3 UWA-RIMS: System setting list

All features are re-built for RIMS, and list name is changed to UWA RIMS.

15.1.4 UWA-RIMS: Set up UWA RIMS facilities

Admin could set up facility contact emails that would be used for new user registration notification.

15.1.5 UWA-RIMS: Booking resource invoicing

Please refer to ACLS Complete Guide for the details of invoicing manager.

15.1.6 *UWA-RIMS: New user meeting*

User meeting module is overhauled for RIMS changes. Go to **Staff -> Registration Pathway Manager** to set up new user meeting for newly registered users (whom haven't been approved yet).

15.1.7 *UWA-RIMS: Existing user meeting*

User meeting module is overhauled for RIMS changes. Go to **Staff -> Registration Pathway Manager** to set up existing user meeting for active users. The only difference between new user meeting and existing user meeting is that new user meeting covers the risk assessment form, but the existing user meeting does not require risk assessment.

15.1.8 *UWA-RIMS: User meeting records*

User meeting records are fully recorded and accessible by clicking User Meeting Records button. Admin staff could edit the record if required.

Previous 1 Next

Show 500 entries

Search: Copy CSV PDF

Showing 1 to 6 of 6 entries

...	User Name	New User Meeting	Risk Assessment	Course Date	Technical Group	Instrument	Any special arrangements or comments	Swipe Card Access	Has sufficient information been provided on the samples to be studied	Date the samples will be ready for analysis	Which preparation facilities (if any) will be used -- Main	Which preparation facilities (if any) will be used -- Secondary	Have all occupational health and safety issues related to the samples been resolved?	What additional health and safety related information is required before the project can commence?	Additional comments	Staff members present at the meeting	Recorded By	Recorded Time	Created Time
Edit	Zheng, Dong (unapproved)	Yes	Yes	one to one	rims technical group				No	26/02/2022							Dong Zheng	26/02/2022 09:37	25/02/2022 23:16
Edit	Emielda UserTrial (existing)	No	N/A	one to one					No	24/02/2022						Chris Brouwer Adam Hamilton	Dong Zheng	26/02/2022 09:27	23/02/2022 18:22
Edit	Zheng, Dong (unapproved)	Yes	Yes	one to one	rims technical group	X-RAY DIFFRACTION FACILITY			No	26/02/2022						Celeste Wale Carlin Bowyer	Dong Zheng	25/02/2022 23:12	25/02/2022 23:12
Edit	Zheng, Dong (unapproved)	Yes	Yes	one to one	rims technical group	X-RAY DIFFRACTION FACILITY			No	26/02/2022						Andrew Van de ven	Dong Zheng	25/02/2022 21:49	25/02/2022 11:59
Edit	Zheng, Dong (unapproved)	Yes	Yes	one to one	rims technical group	X-RAY DIFFRACTION FACILITY			No	26/02/2022							Dong Zheng	25/02/2022 12:01	25/02/2022 12:01
Not editable	Emielda UserTrial (existing)	No	N/A					Bayliss Building;Myers Building;	Yes	18/09/2021						Emielda Yusiharni	Emielda Yusiharni	17/09/2021 14:47	17/09/2021 14:47

Previous 1 Next

15.1.9 *UWA-RIMS: User registration and meeting records at User Profile Manager*

Go to **Staff -> Users -> User Profile Manager** to edit user profile and access registration and meeting records. Printable copy is available as well.

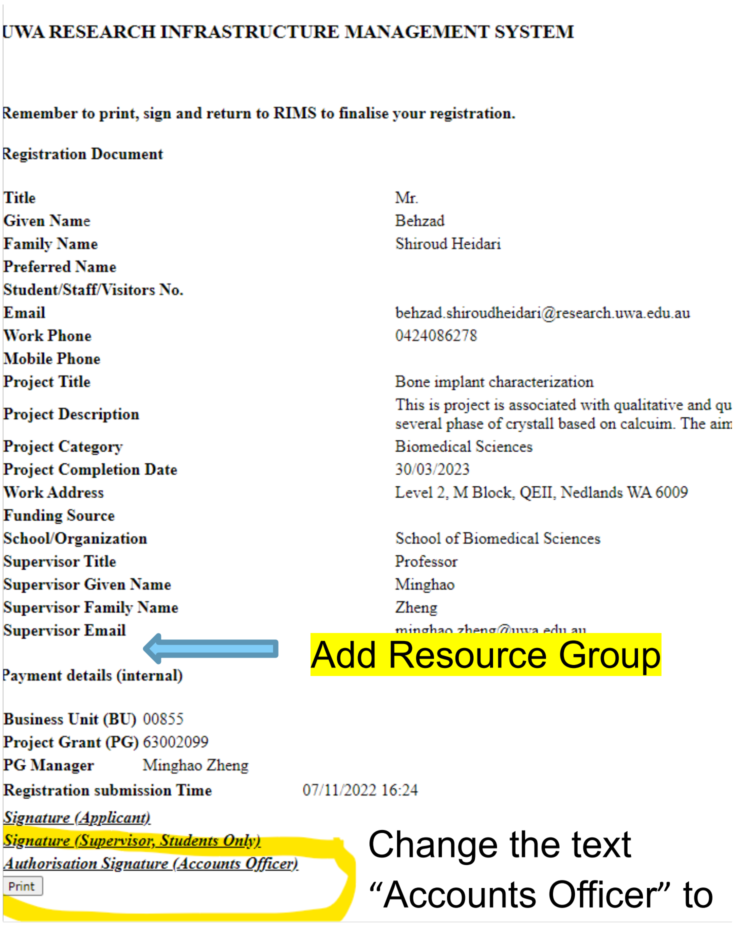
15.2 UWA-RIMS: 2023 Requested Changes – Part A

RIMS made the further changes in 2023 for Part A and Part B.

15.2.1 *UWA-RIMS: Modification requirements:*

Item 1.1: Registration Page/s

Change the text "Accounts Officer" to PG Manager and include Resource Group in registration Document.



UWA RESEARCH INFRASTRUCTURE MANAGEMENT SYSTEM

Remember to print, sign and return to RIMS to finalise your registration.

Registration Document

Title	Mr.
Given Name	Behzad
Family Name	Shiroud Heidari
Preferred Name	
Student/Staff/Visitors No.	
Email	behzad.shiroudheidari@research.uwa.edu.au
Work Phone	0424086278
Mobile Phone	
Project Title	Bone implant characterization
Project Description	This is project is associated with qualitative and qu several phase of crystall based on calcuim. The aim
Project Category	Biomedical Sciences
Project Completion Date	30/03/2023
Work Address	Level 2, M Block, QEII, Nedlands WA 6009
Funding Source	
School/Organization	School of Biomedical Sciences
Supervisor Title	Professor
Supervisor Given Name	Minghao
Supervisor Family Name	Zheng
Supervisor Email	minghao.zheng@uwa.edu.au

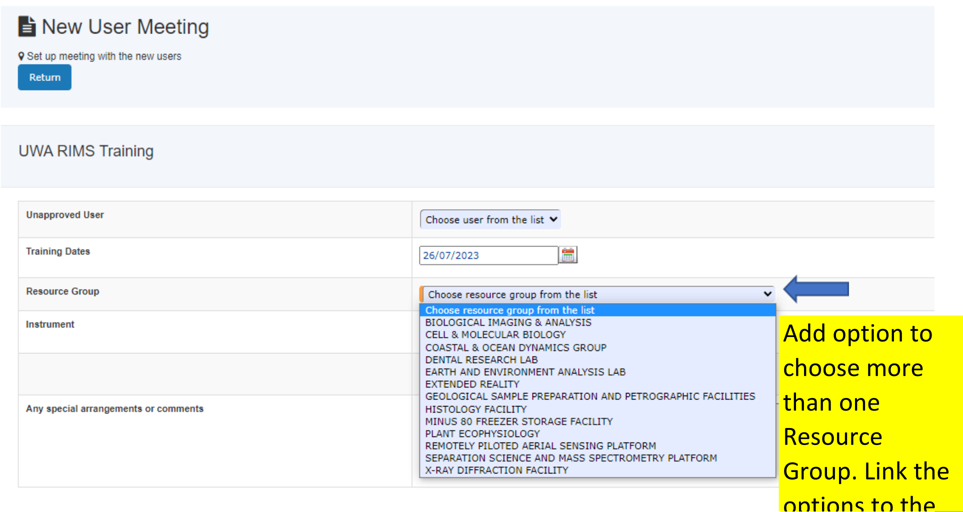
Payment details (internal)

Business Unit (BU) 00855
Project Grant (PG) 63002099
PG Manager Minghao Zheng
Registration submission Time 07/11/2022 16:24

Signature (Applicant)
Signature (Supervisor, Students Only)
Authorisation Signature (Accounts Officer)
Print

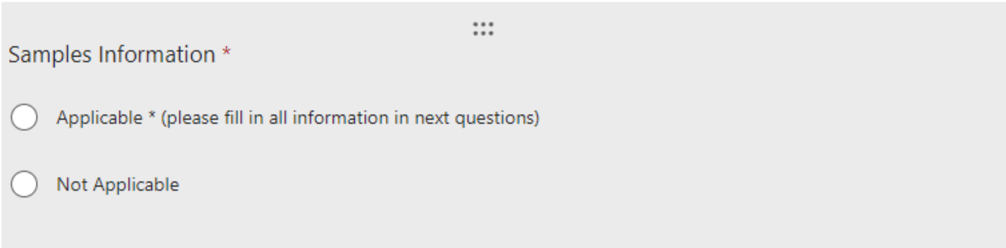
Item 1.2: New User Meeting and Existing User Meeting

NUM/EUM - Facility selection. Add capability to select multiple facilities (resources) during the new user meeting, rather than needing to follow up new user registration but existing user registration to capture all facilities used.



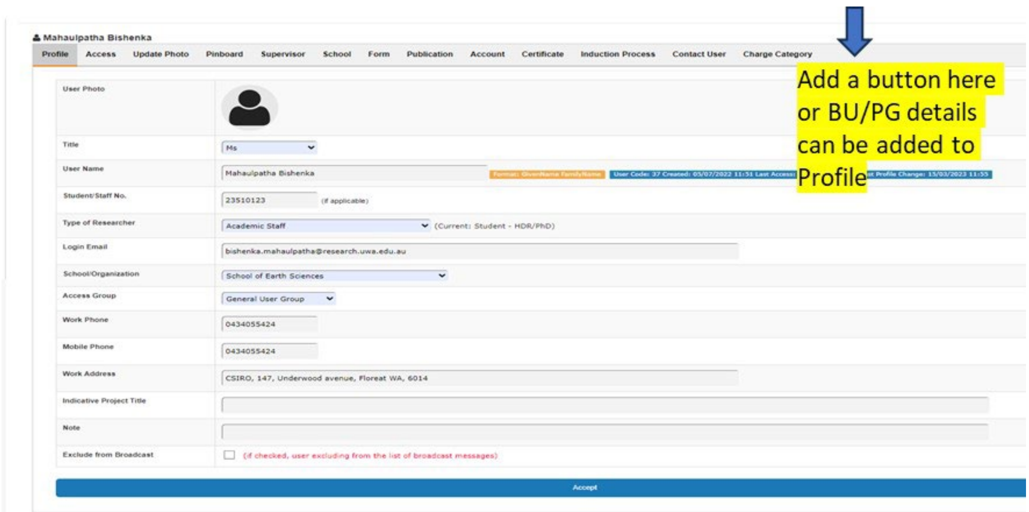
New User Meeting- Samples information:

Can we include a tick box to disable/enable the need to populate?
Add this question below Samples.



Item 1.4: BU and PG details

Details are only listed in the registration forms at this stage. BU and PG details need to be embedded to the user profile or account so all the details can be linked to Booking report and Invoice.



EMAIL: eric.may@uwa.edu.au

DATE: June 15, 2023

DETAILS:

This Statement covers the work by your groups in January 2023.

Details of Bookings:

User	Resource	Booking Start Time	Booking End Time	Account	Booked Hours
Liu Libin	Aeris X-Ray Diffractometer	18/01/2023 09:00	18/01/2023 11:00	Internal Student-Account	2.00
Liu Libin	Aeris X-Ray Diffractometer	31/01/2023 08:00	31/01/2023 11:00	Internal Student-Account	3.00
Liu Libin	Aeris X-Ray Diffractometer	31/01/2023 14:00	31/01/2023 17:00	Internal Student-Account	3.00

Summary of Bookings:

Resource	User	Account	Resource Charge/Hour	Booked Hours	Charges
Aeris X-Ray Diffractometer	Liu Libin	Internal Student-Account	$20.00	8.00	$160.00
Sub-Total				8.00	$160.00
TOTAL				8.00	$160.00

An internal transfer from the fund details you have provided will be organized. Details are as follows:

Account	Charges
Internal Student-Account	$160.00

Add BU and PG details here

Invoice No: 00000024

Kind Regards,
Emielda Yusiharni

Phone: 64882714

Email: emielda.yusiharni@uwa.edu.au

Print

Item 1.5: User pathway manager:

Add Double confirmation button before deleting a user on Registration Pathway manager.

○	Signed form received	Boitt, Gustavo	Ref-umhxrwEW1Jju-OLyKWp
○	ACLS activated/ re-activated and user notified	Boitt, Gustavo	Ref-umhxrwEW1Jju-OLyKWp

Select and Update Pathway

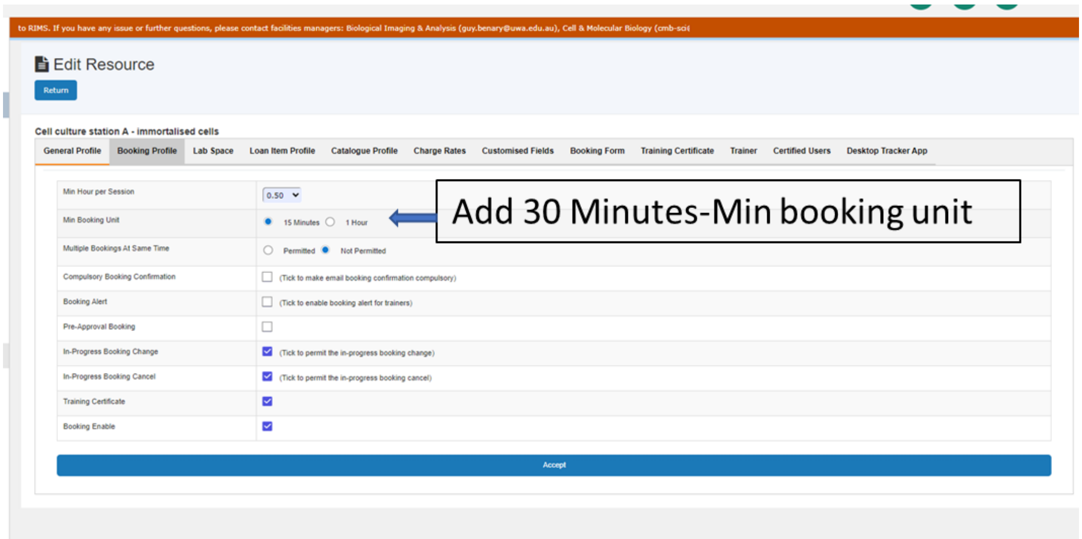
* If the user was registered, please select the user from the list and click on [Approve] to overwrite the profile.
* If the user is first time to register, please click on [Approve] to add as new user.

User: Choose user from the list

Approve Delete

Item 1.7: Resource profile editor – booking profile

Add 30 minutes for Min Booking Unit

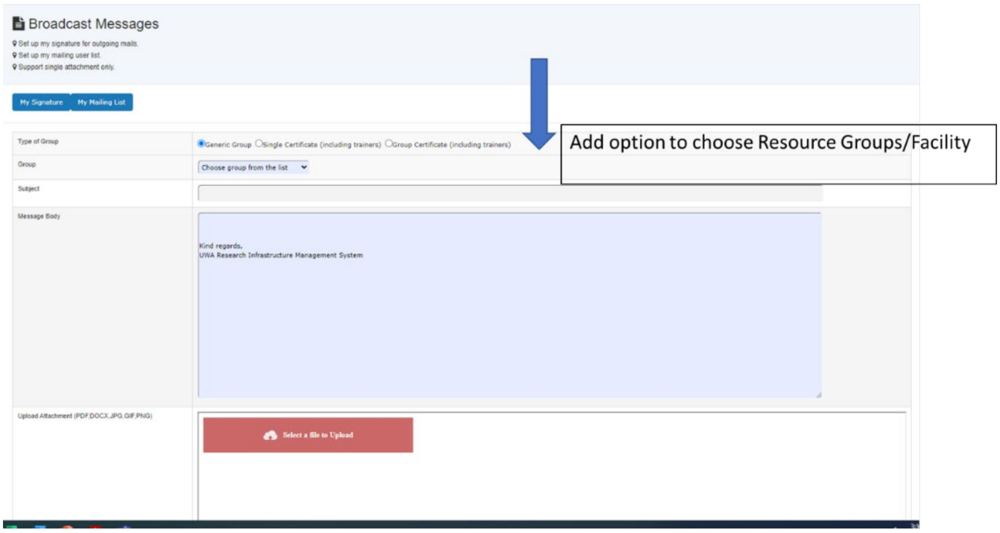


Item 1.8: Booking forms attachment

Currently attaching a hiring form to equipment for facility, but there is no clear place to obtain these on the website? The user attaches it, but the manager of the facility does not get notified of form or where to view. Can this be emailed with the booking notification or placed under the equipment resource / form repository?

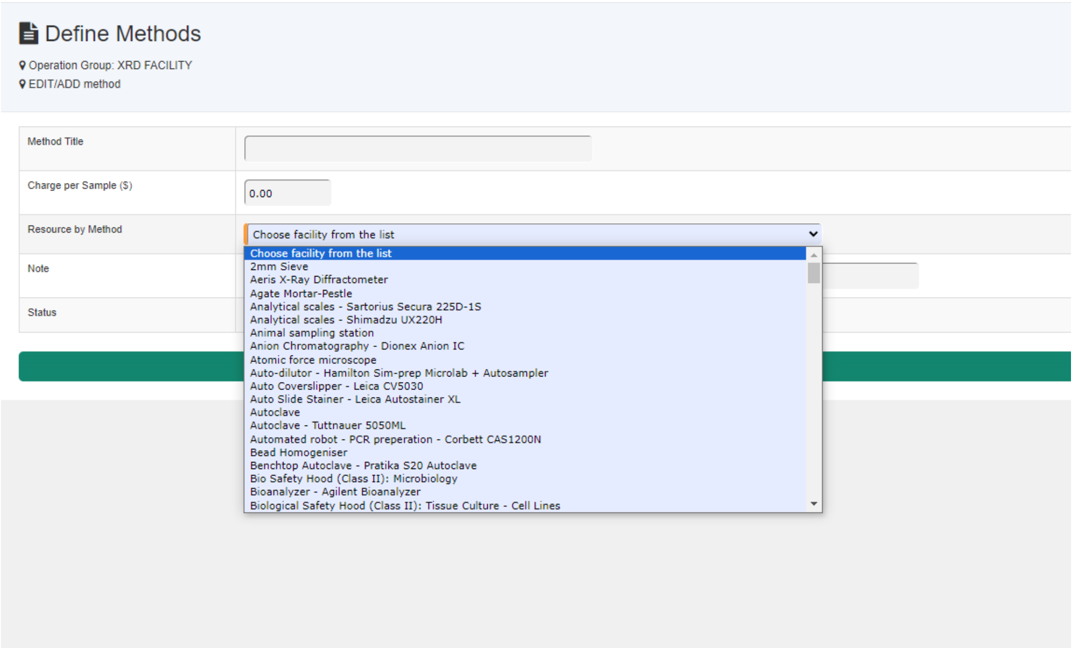
Item 1.9: Broadcast Message

Add option to choose Resource Groups/Facility



Item 1.10: Samples

Option to add multiple resources to a single Method (tick box? Or “Add more” button to generate additional drop-down lists?).



- Add to “Define Methods” a new box “Flat rate” (new project design/admin fee) where we can manually assign an additional value. Text box to add: Additional fee.
- Option to add an additional flat fee to a batch of samples (on top of the per sample cost).
- Add to “Define Method” an hourly rate fee. Text box to add: Charge per hour ($)
- Embed “Sample Methods” in initial Check In interface.

15.2.2 UWA-RIMS: Item 1.1: Registration pages

The requested changes are made for “Account Officer” to “PG Manager”, and to include resource group.

RIMS made the further change requests as followings:

At times the primary supervisor differs to the PG Manager. Is it possible to also add the PG Manager’s email address as this is where the invoice will be sent?

30 days before the PG expiry date, Auto-reminder is sent to the user and copy to admin mailbox.

- Registration form: PG manager email address and PG expiry date are added to the registration form.
- User profile editor: added a checkbox in pg/bu tab in user profile editor to appoint PG manager as the invoiced staff
- Auto-reminder for PG expiry date is implemented

15.2.3 UWA-RIMS: Item 1.2: New User Meeting and Existing User Meeting

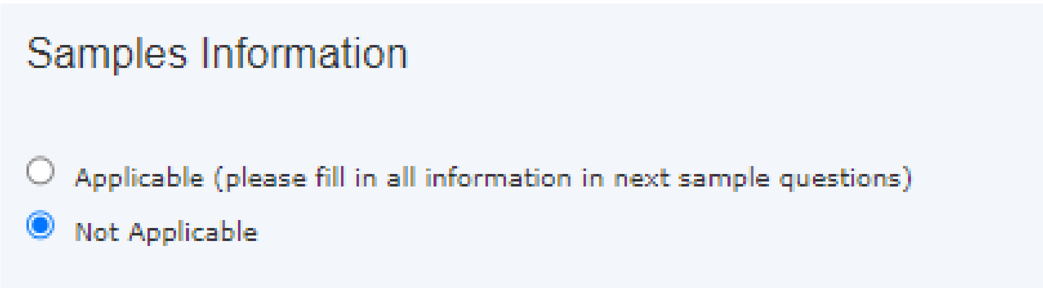
Select multiple resource groups:

Staff and admin could select multiple resource groups and selected groups and resources of the selected groups are shown up on the same table, staff and admin can select the resources if required.

The selected resource groups and resources are shown up in the user meeting record table.

Sample information:

Enable and disable feature is added for staff and admin.



User meeting record table:

...	User Name	New User Meeting	Risk Assessment	Training Date	Technical Group	Instrument
Edit	Butler, Isabella (unapproved)	Yes	Yes	03/01/2024	CELL & MOLECULAR BIOLOGY	Analytical scales - Shimadzu UX220H (CELL & MOLECULAR BIOLOGY); Animal sampling station (CELL & MOLECULAR BIOLOGY);

15.2.4 UWA-RIMS: Item 1.4: BU and PG details

BU and PG are added to user profile for information only. ACLS fetches the BU and PU from registration automatically upon the registration approval.

If the same user submits the multiple registration forms over years, the history of the registration is also provided in the Registered BU/PG tab.

When the modification patches being applied to ACLS, system administrators can run the script to fetch the initial BU and PU for all users from their registration records.

The Registered Resource Group tab is also added for information only.

Business Unit	00915
Project Grant	10301026
PG Manager	Archa Fox

History

Business Unit
00915

Admin can change all data manually if required.

Admin to Update:

Business Unit	00585
Project Grant	12706102
PG Manager	Prof. Hongqi Sun
PG Manager Email	
Set PG Manager as Default for Invoicing	☐
PG Expiry Date*	30/03/2024

Submit

15.2.5 UWA-RIMS: Item 1.5: User pathway manager

An alert message is popped up when admin intend to delete the registration.

Do you really want to delete/decline?

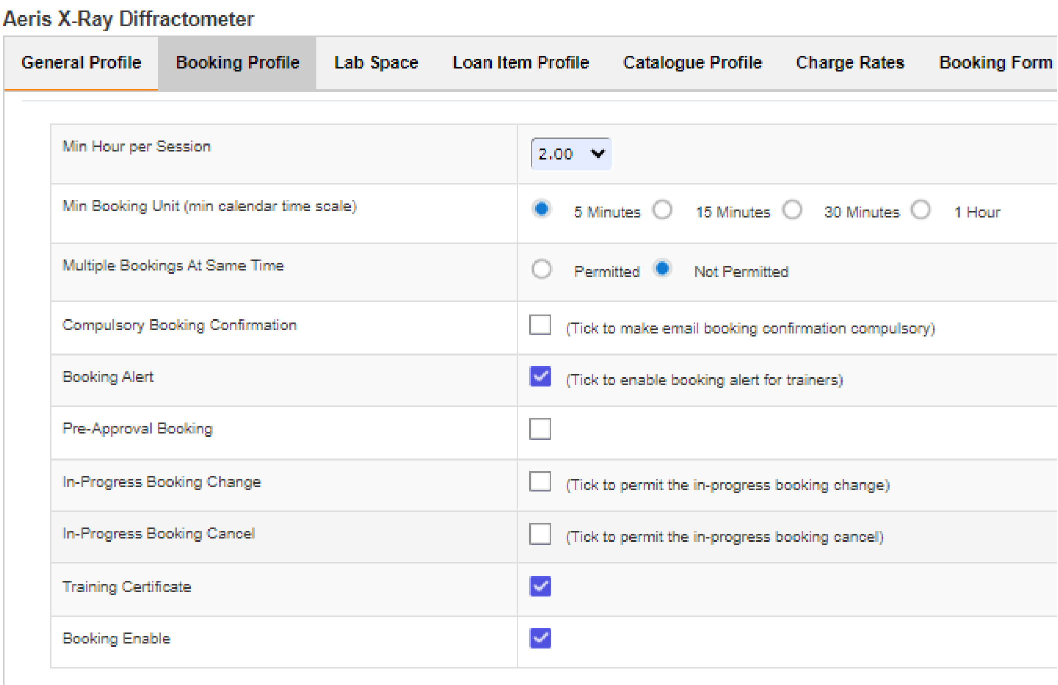
OK Cancel

15.2.6 UWA-RIMS: Item 1.7: Resource profile editor – booking profile

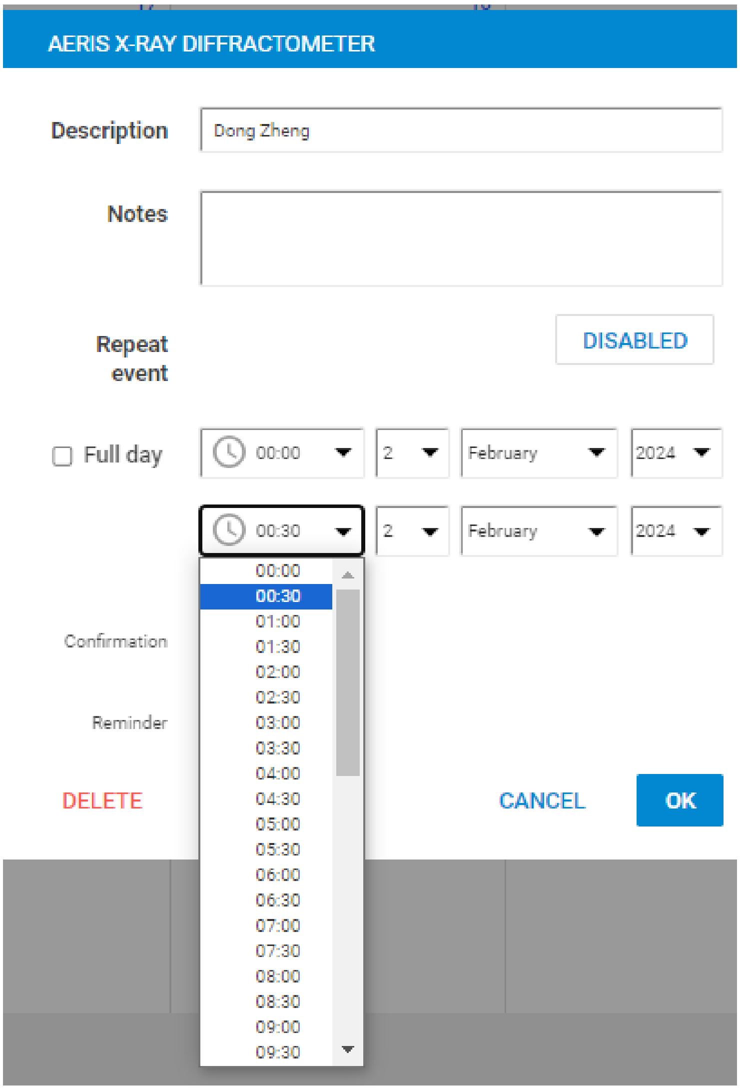
Calendar time scale is re-designed to add the following options:

- 5 minutes
- 15 minutes
- 30 minutes
- 1 hour

Go to ***Staff tab -> Utility -> Resource Manager -> Booking Resources -> Resource Profile Editor***, then go to booking profile tab to make selection.



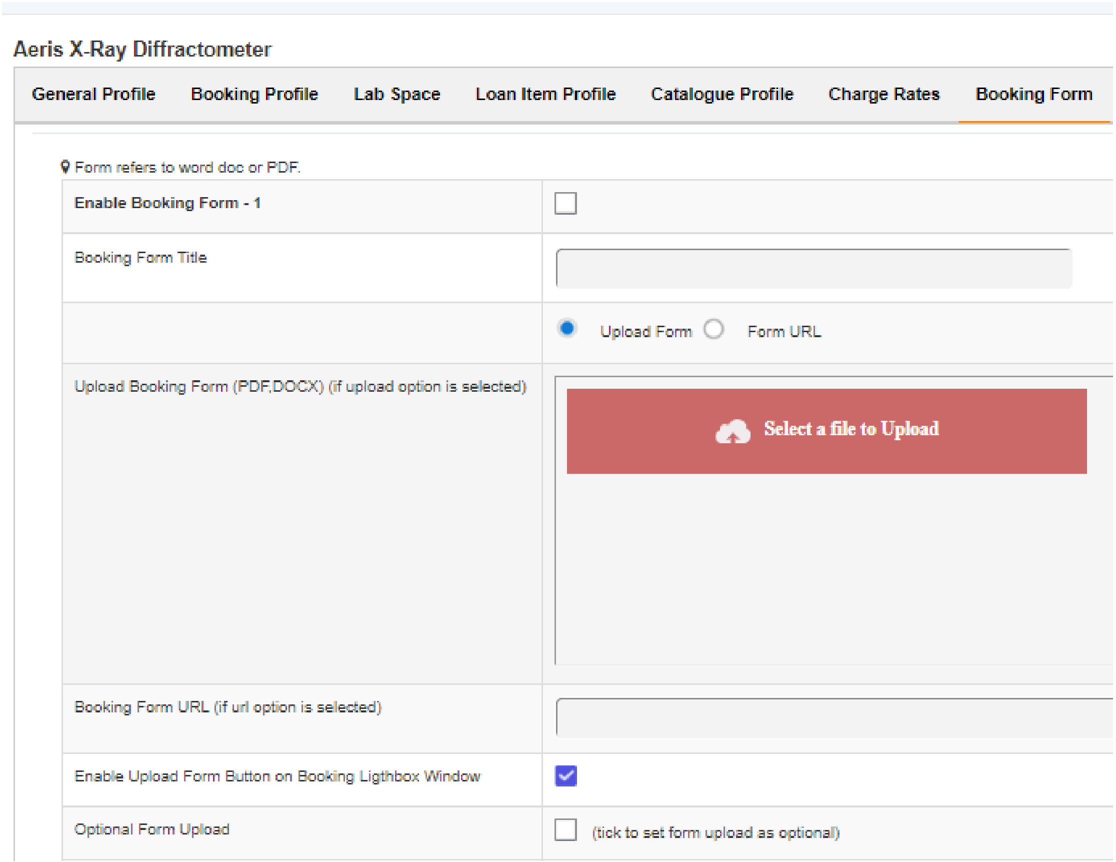
Booking calendars are modified to work according to the Min Booking Unit, 30 minutes calendar scale example shown here.



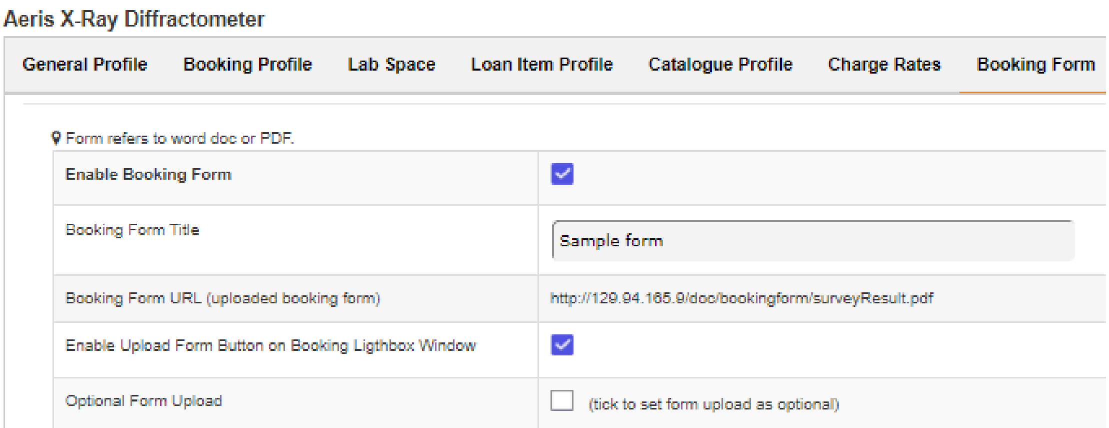
15.2.7 UWA-RIMS: Item 1.8: Booking form attachment

Upload form to resource profile

In addition to the current form url that links to the external source, admin can upload the form as the alternative.

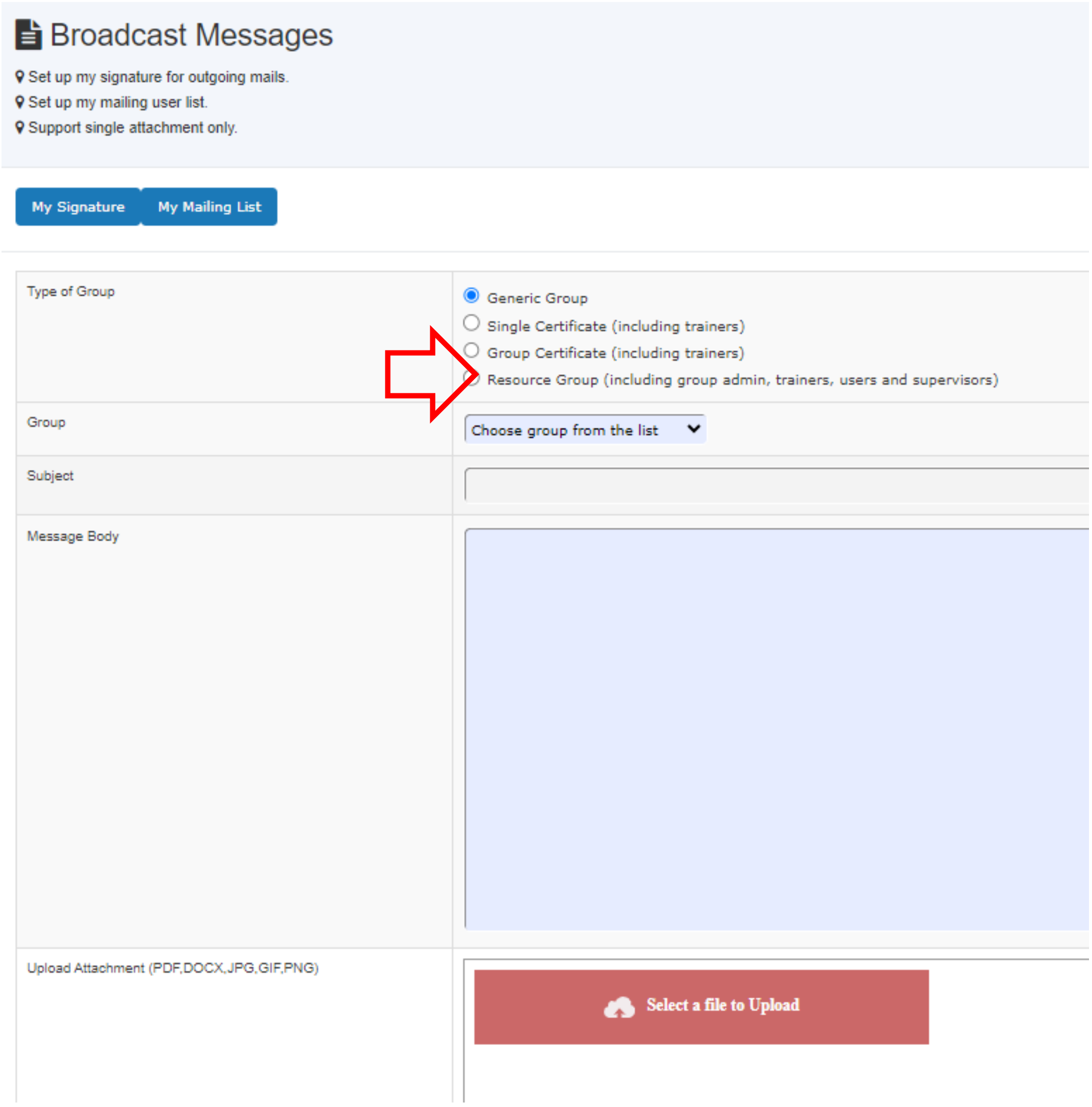


After uploading the form,



15.2.8 UWA-RIMS: Item 1.9: Broadcast messages

As requested, resource group selection is added to broadcast message feature.



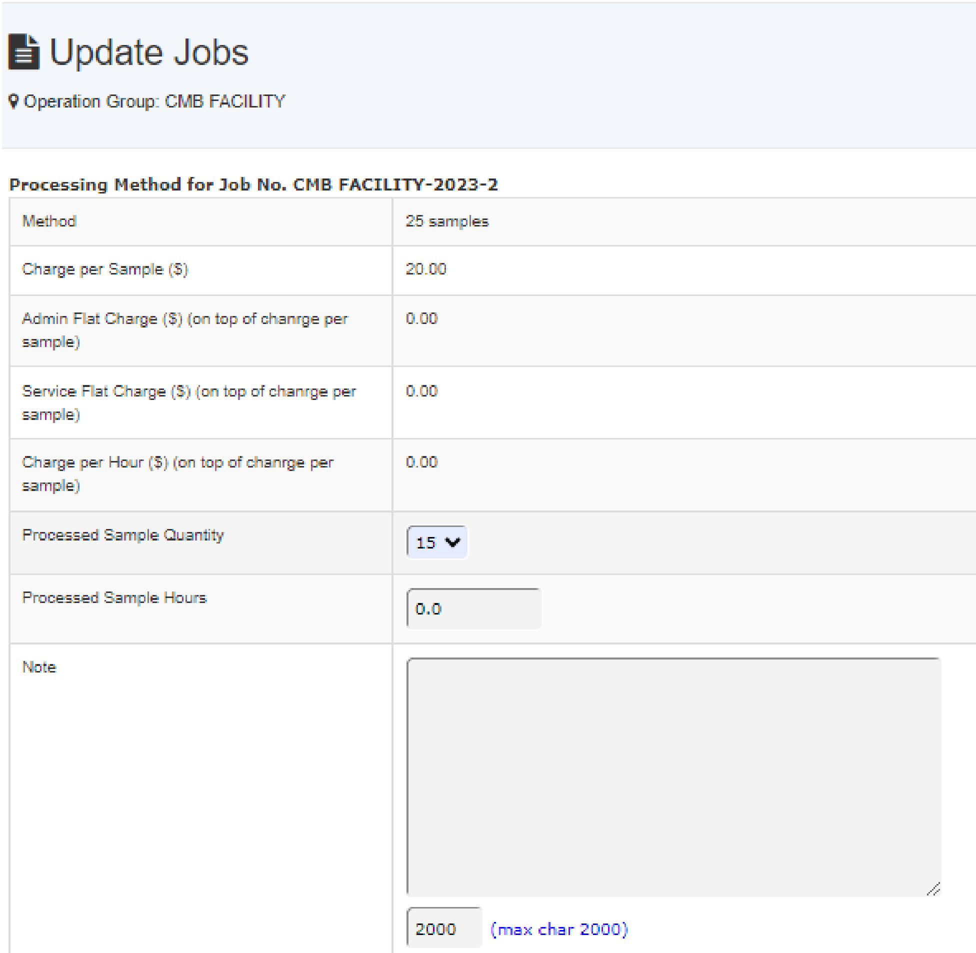
15.2.9 UWA-RIMS: Item 1.10: Samples

Define methods

Admin/design flat charge, service flat charge and charge per hour are introduced to each method, they are added to the top of the charge per sample.

Resource selection is added to the method, currently, selection is for information only, however, automation could be achieved with charge per hour in the future modification.

Process samples



Update Jobs

Operation Group: CMB FACILITY

Processing Method for Job No. CMB FACILITY-2023-2

Method	25 samples
Charge per Sample ($)	20.00
Admin Flat Charge ($) (on top of chanrge per sample)	0.00
Service Flat Charge ($) (on top of chanrge per sample)	0.00
Charge per Hour ($) (on top of chanrge per sample)	0.00
Processed Sample Quantity	15
Processed Sample Hours	0.0
Note	2000 (max char 2000)

Staff can select the processed sample quantity as usual, also the processed sample hours are included for manual hour entry subject to the resource or instrument usages.

Charge calculation is scripted for clarification on the process sample page.

Method total charge calculation: (processed sample quantity) x (charge per sample) + (processed sample hours) x (charge per hour) + admin flat charge + service flat charge and apply job discount if any.

Sample invoice

SAMPLE JOBS STATEMENT

TO: Amr Fawzy Moussa

TEL:

FAX:

EMAIL: amr.fawzy@uwa.edu.au

DATE: January 19, 2024

DETAILS:

This Statement covers the sample jobs completed for your groups.

Details of Jobs:

Job No	Customer/User	School/Organization	Account	Job Discount (%)	Sample Type	Method	Processed Sample Quantity	Charge per Sample	Processed Sample Hours	Charge per Hour	Admin Flat Charge	Service Flat Charge	Charge
CMB FACILITY-2023-1	Celeste de Trial	Cell Biology and Imaging Platform	Internal Account	11.0	Genotyping optimisation	25 samples	2	$20.00	0.0	$0.00	$0.00	$0.00	$35.60
CMB FACILITY-2023-1	Celeste de Trial	Cell Biology and Imaging Platform	Internal Account	11.0	Genotyping optimisation	Category 1, 1-10 samples	1	$1.00	10.0	$40.00	$2.00	$3.00	$40.94
													$76.54

An internal transfer from the fund details you have provided will be organized. Details are as follows:

Account	Charges
Internal Account	$76.54

Invoice No: ST00000021

Charge calculation is scripted for clarification on the sample invoice page.

Method total charge calculation: (processed sample quantity) x (charge per sample) + (processed sample hours) x (charge per hour) + admin flat charge + service flat charge and apply job discount if any.

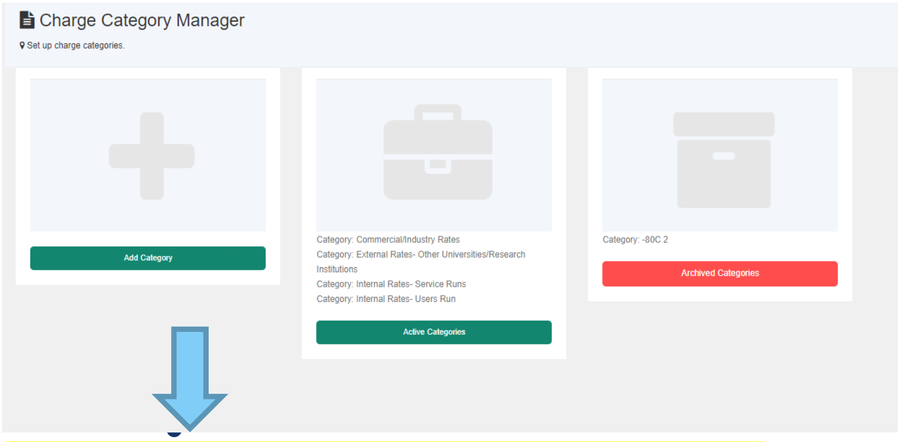
15.3 UWA-RIMS: 2023 Requested Changes – Part B

15.3.1 UWA-RIMS: Modification requirements:

Item 1.3: Charge Modification (3 modules: RIMS current module, propose to add CMCA Module and Cell Biology and Imaging platform module). Can we combine

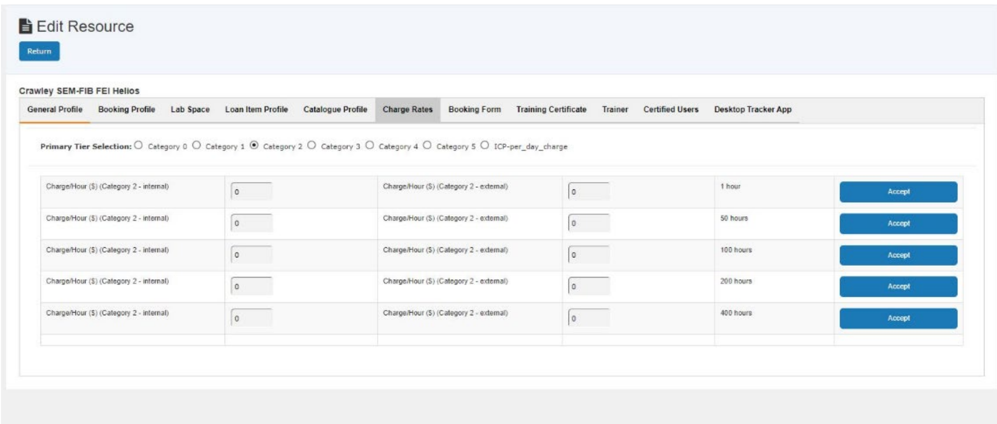
current charge out model on RIMS with CMCA one and proposed Cell Biology and Imaging platform module, so we will have three charges out models/options?

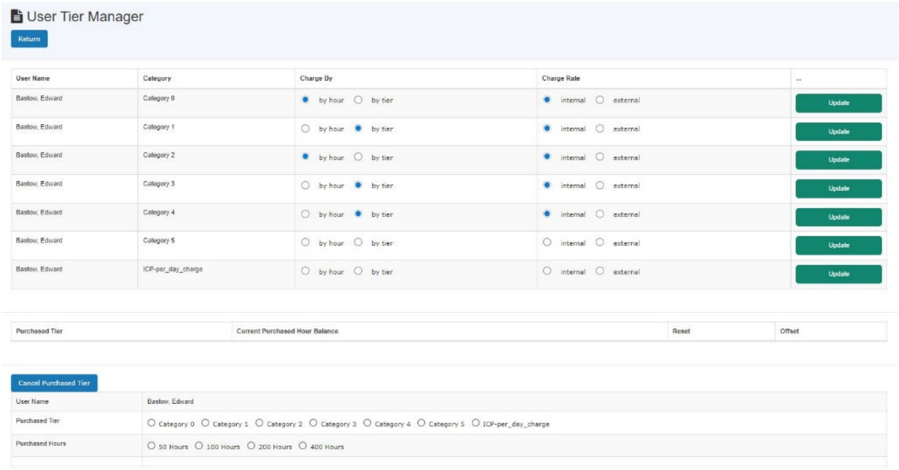
- RIMS Current module (no change)
- Addition of a tiered charge rate approach to facilitate option such as pay per hour and pre-purchase block of hours; this configuration exists in the CMCA ACLS.



Add two categories: CMCA charge category option and Cell Biology & Imaging Charge here, so each resource group would have three charge models/options to choose.

- CMCA charge module





- Cell Biology & Imaging (CBI) Recharge Module

Platform Subscription Charges – A tiered payment structure dependent on the relative size of lab or academic group.

Cell Biology & Imaging	
Subscription Access (Collaborator – Trained/Experienced User)	
Lab / Group Size	**Fee per annum, per lab/group***
1 Researcher	$1000 (1000 per person)
Up to 2 Researchers	$1900 (950 per person)
Up to 3 Researchers	$2700 (900 per person)
Up to 4 Researchers	$3600 (900 per person)
Up to 5 Researchers	$4250 (850 per person)
Up to 6 Researchers	$5100 (850 per person)
Up to 7 Researchers	$5950 (850 per person)
Up to 8 Researchers	$6400 (800 per person)
Up to 9 Researchers	$7200 (800 per person)
Up to 10 Researchers	$8000 (800 per person)
Up to 11 Researchers	$8250 (750 per person)
Up to 12 Researchers	$9000 (750 per person)
Up to 13 Researchers	$9750 (750 per person)
Up to 14 Researchers	$9800 (700 per person)
Up to 15 Researchers	$10500 (700 per person)
Up to 16 Researchers	$11200 (700 per person)
More than 16 Researchers (capped)	$12000
Students (Honours, Masters & HDR) pay flat rate of $500 per student per annum regardless of when they registered to the booking system.	

Requirements of CBI registration RIMS charging application.

- An e-mail feature will allow sending list of Lab members to the head of lab to confirm that they are all associated with his/her lab.
- Once the list of head of labs and their associated researchers and students was established – the registration fee is determined according to the above table.
- Approving this list (tick box, by one of the administrators) generates an email sent to the head of lab requesting the payment. (Automation request)
- An automated similar e-mail is sent to the academic every 10 day until the account is paid. Every e-mail indicates how many requests were sent. Include a request to cc in the relevant facility manager in the payment authorisation email, to ensure their access will be processed in RIMS without delay. (Automation request)
- We will also need an option to charge individual users later in the year if student/researchers join the lab in later stages of the year. The registration of these users to RIMS should be separated from the registration payment. This is very similar (or maybe the exact same module as the initial one – (automated fee modification based on dates of registration- example: registration starting on July will be charge half of the fee)
  - ACLS checks unpaid users who joined in the mid of year and notify the lab admin
  - Lab admin clicks a button to send unpaid notification to the supervisor for the further action
  - Lab admin enter the prorated figure for the unpaid users, system record for tracking

Item 1.6 Booking Reports Modification

- Add BU/PG Details for each user.
- Modify report format for period booking to include all details of each date/time of bookings. Below is an example of the report details.

15.3.2 UWA-RIMS: Set up charge module per resource group

3 modules are available to select for each resource group in the newly created Charge Module Manager, that can be accessed via Staff tab -> Utility -> Charge Module Manager.

Here is the screen print of the example:

Resource Group	Resource Group Owner	Selected Charge Module	Change Charge Module
BIOLOGICAL IMAGING & ANALYSIS	Guy Ben-Ary;	CMCA Module (Tier)	Standard Module (Hourly) CMCA Module (Tier) CBI Module (Subscription) Submit
CELL & MOLECULAR BIOLOGY	Celeste Wale;	CBI Module (Subscription)	Standard Module (Hourly) CMCA Module (Tier) CBI Module (Subscription) Submit

Selected Charge Module	Change Charge Module
CMCA Module (Tier)	○ Standard Module (Hourly) ◉ CMCA Module (Tier) ○ CBI Module (Subscription) Submit
CBI Module (Subscription)	○ Standard Module (Hourly) ○ CMCA Module (Tier) ◉ CBI Module (Subscription) Submit

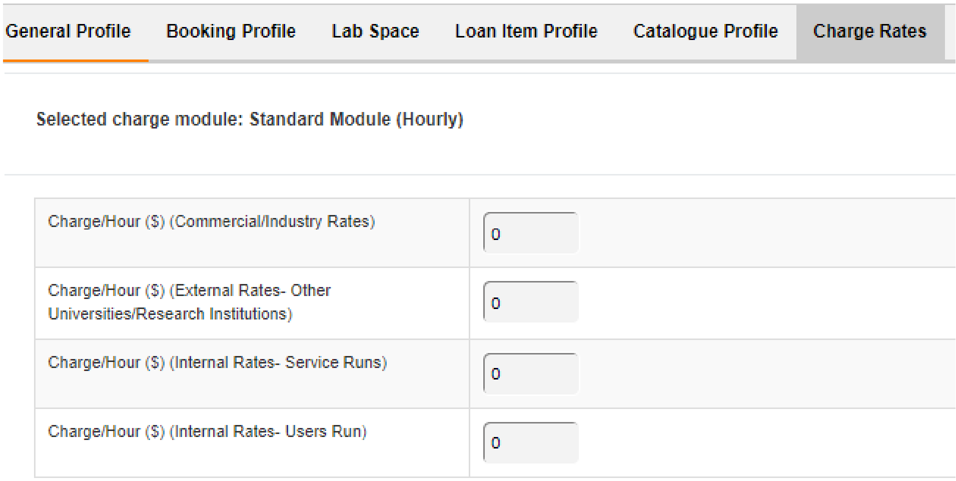
System records each change of the resource group and module as tracing logs.

After linking the charge module to the resource group, admin could see the selected charge module in Resource Manager for each resource profile.

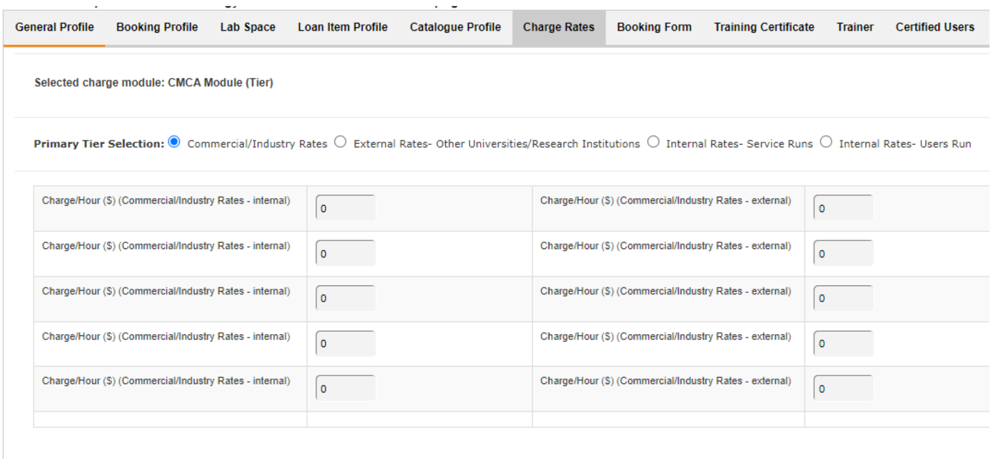
...	Resource	Resource Group	Charge Module
Edit Clone Archive Delete	2mm Sieve	X-RAY DIFFRACTION FACILITY	Standard Module (Hourly)

Enter resource profile editor, admin could access charge rate tab for 3 modules.

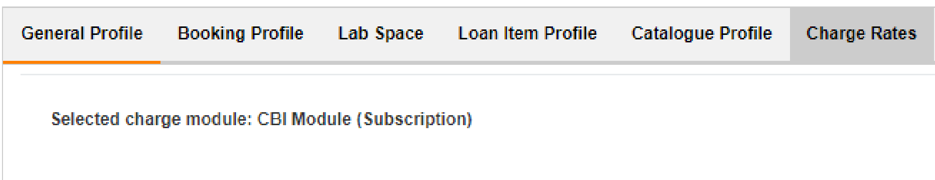
Standard module:



CMCA module:



CBI Module:



15.3.3 UWA-RIMS: About standard module

Standard module refers to the current RIMS hourly rate charge model, users can book the resource as usual and being charged as hourly rate vs category.

15.3.4 UWA-RIMS: About CMCA module

CMCA module uses the tier structure to handle the charges, the full description of CMCA module is available at ACLS complete guide 2024.

Upon linking resource group to CMCA module, admin and resource group manager need to use CMCA User Tier Manager to handle the user tiers and purchased hours.

15.3.5 UWA-RIMS: About CBI module

CBI is a subscription-based charge module. A newly created CBI Subscription Module Manager is available to manage the CBI subscription details. The default module charge table is hardcoded according to the requirements.

Cell Biology & Imaging	
Subscription Access (Collaborator – Trained/Experienced User)	
Lab / Group Size	**Fee per annum, per lab/group***
1 Researcher	$1000 (1000 per person)
Up to 2 Researchers	$1900 (950 per person)
Up to 3 Researchers	$2700 (900 per person)
Up to 4 Researchers	$3600 (900 per person)
Up to 5 Researchers	$4250 (850 per person)
Up to 6 Researchers	$5100 (850 per person)
Up to 7 Researchers	$5950 (850 per person)
Up to 8 Researchers	$6400 (800 per person)
Up to 9 Researchers	$7200 (800 per person)
Up to 10 Researchers	$8000 (800 per person)
Up to 11 Researchers	$8250 (750 per person)
Up to 12 Researchers	$9000 (750 per person)
Up to 13 Researchers	$9750 (750 per person)
Up to 14 Researchers	$9800 (700 per person)
Up to 15 Researchers	$10500 (700 per person)
Up to 16 Researchers	$11200 (700 per person)
More than 16 Researchers (capped)	$12000
Students (Honours, Masters & HDR) pay flat rate of $500 per student per annum regardless of when they registered to the booking system.	

CBI model is changed from the above table to the running number for researcher group size from 1 researcher to 16 researcher group size.

System only provides two-year selection for admin to work on the charge model, the current year and next year, for example, 2024 and 2025

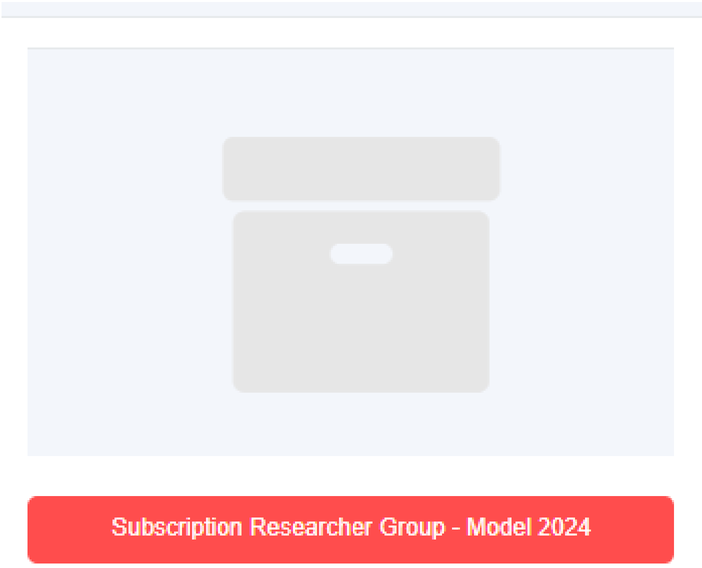
Step 1: Set up yearly subscription charge model

The first step is to set up model based on the predefined group size for the selected year, 2024 and 2025 in the following examples.

2024 Model	Researcher Lab/Group Size	Fee per Annum, per Lab/Group	...
	Student (Flat Rate)	$500.00 (per person)	0.00 Submit
	1 Researcher	$1000.00 ($1000.00 per person)	0.00 Submit
	2 Researcher	$1900.00 ($950.00 per person)	0.00 Submit
	3 Researcher	$2700.00 ($900.00 per person)	0.00 Submit
	4 Researcher	$3600.00 ($900.00 per person)	0.00 Submit
	5 Researcher	$4250.00 ($850.00 per person)	0.00 Submit
	6 Researcher	$5100.00 ($850.00 per person)	0.00 Submit
	7 Researcher	$5950.00 ($850.00 per person)	0.00 Submit
	8 Researcher	$6400.00 ($800.00 per person)	0.00 Submit
	9 Researcher	$7200.00 ($800.00 per person)	0.00 Submit
	10 Researcher	$8000.00 ($800.00 per person)	0.00 Submit
	11 Researcher	$8250.00 ($750.00 per person)	0.00 Submit
	12 Researcher	$9000.00 ($750.00 per person)	0.00 Submit
	13 Researcher	$9750.00 ($750.00 per person)	0.00 Submit
	14 Researcher	$9800.00 ($700.00 per person)	0.00 Submit
	15 Researcher	$10500.00 ($700.00 per person)	0.00 Submit
	16 Researcher	$11200.00 ($700.00 per person)	0.00 Submit
	More than 16 Researchers (capped)	$12000.00	0.00 Submit

Yearly model summary and logs are available for admin to collect the model information and change details.

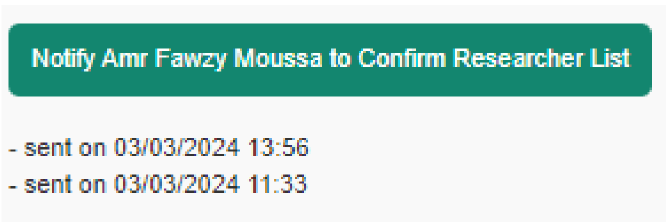
Step 2: Set up connectivity between the supervisor of the resource group and the yearly model



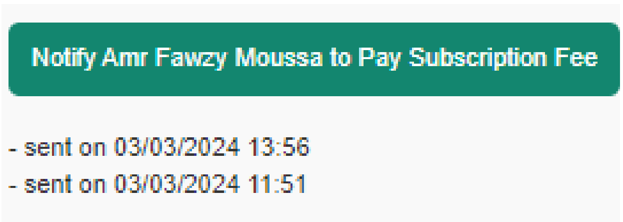
At the top of page, model summary is provided for model subscription fee details.

Admin and resource group manager could select the supervisor to connect his/her research group to the subscription model. Upon selecting supervisor, admin could take the following actions to complete the payment process.

Notify supervisor to approve the research list



Notify supervisor to make payment



Mark each researcher payment status

Year	Researcher	Type of Researcher	Supervisor	Subscription Charge per Person	Payment Status
2024	Alex Tang	Academic Staff	Alex tang	$950.00	Unpaid Mark as Paid
2024	Ong Rebecca	Student - HDR/PhD	Alex tang	$950.00	Unpaid Mark as Paid

Exclude researcher from subscription model

Admin could exclude/include the researcher from the subscription module so the excluded researcher will be charged with the standard module. If the researcher is excluded from the researcher group, the group size is changed, and system calculates the new group size and apply with the new subscription fees.

Student Status	...
CBI Researcher Mark as Student	Included into subscription Exclude from Subscription
CBI Researcher Mark as Student	Included into subscription Exclude from Subscription

Mark as student or researcher

If the user is marked as student, flat rate applies. Id the user is marked as researcher, the researcher rate applies.

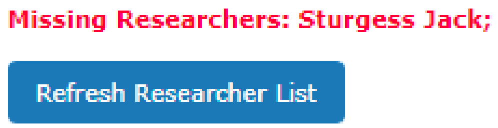
Student Status	...
CBI Researcher Mark as Student	Included into subscription Exclude from Subscription
CBI Researcher Mark as Student	Included into subscription Exclude from Subscription

15.3.6 UWA-RIMS: Archive selected supervisor

Admin could archive the supervisor if the supervisor is no longer covered by subscription model or wrongly selected.

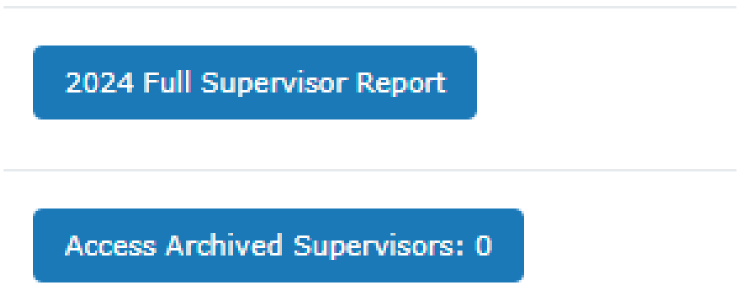
15.3.7 UWA-RIMS: Missing researchers

New users could be added to the supervisor researcher group after activating the supervisor to the subscription model, system alerts the missing user name, admin clicks on Refresh Researcher List button to reload.



15.3.8 UWA-RIMS: Full supervisor report

Admin could access the full report and export report for the subscription details of entire supervisor researcher groups.



15.3.9 UWA-RIMS: Email notification to confirm researcher list

Implemented the requested template:

Subject: Cell Biology & Imaging (CBI): Subscription Confirmation

Body:

Dear xxx,

For the purposes of your CBI subscriptions, the following RIMS users are registered under your research group:

- yyy (Visitor Postdoctoral Research Fellow)

- zzz (Student - HDR/PhD)

Please confirm this information is accurate or send any modifications to abc@uwa.edu.au.

Kind regards,

15.3.10 UWA-RIMS: Email notification for payment

Implemented the requested template:

Subject: Cell Biology & Imaging (CBI): 2024 Subscription Fees

Body:

Dear xxx,

Based on your confirmed RIMS user list (see below), the 2024 unpaid subscription fees for your research group are as follows:

- yyy (Student - HDR/PhD) (CBI Student), subscription fee is not paid yet: $500.00

- zzz (Academic Staff) (CBI Researcher), subscription fee is not paid yet: $1000.00

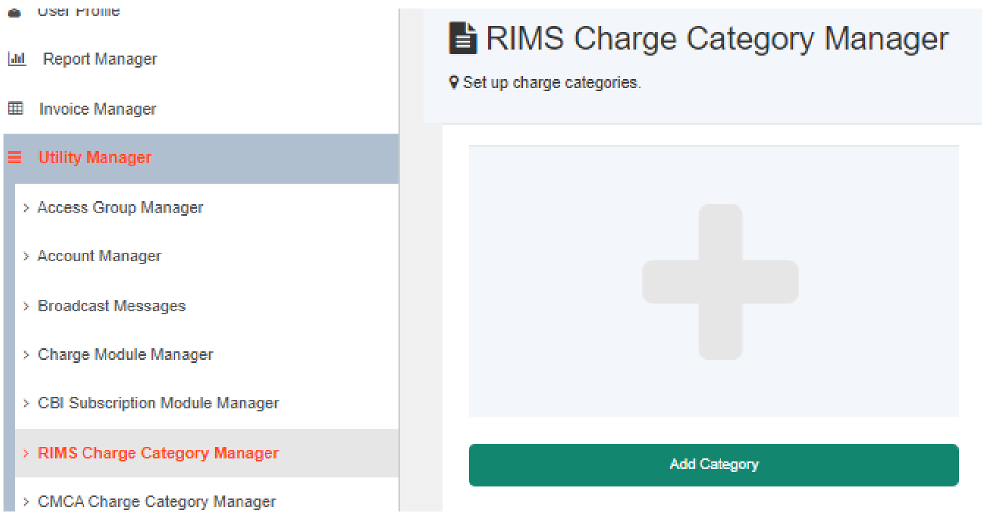
Total unpaid subscription fee: $1500.00

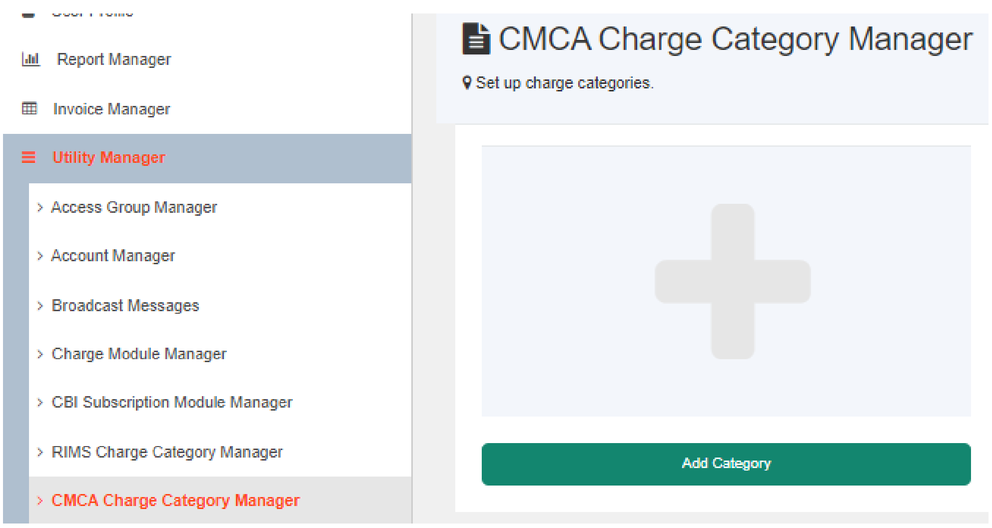
Please send authorisation of your BU/PG details to abc@uwa.edu.au. All queries and modification can also be directed here.

Kind regards.

15.3.11 UWA-RIMS: Charge category manager

RIMS and CMCA are separated to handle the different settings of the charge categories.





15.3.12 UWA-RIMS: Booking reports

Implemented the requested following changes:

- Added BU/PG Details for each user.
- Modified report format for period booking to include all details of each date/time of bookings.

16 Appendix H – ACLS Modification for NIF-WA

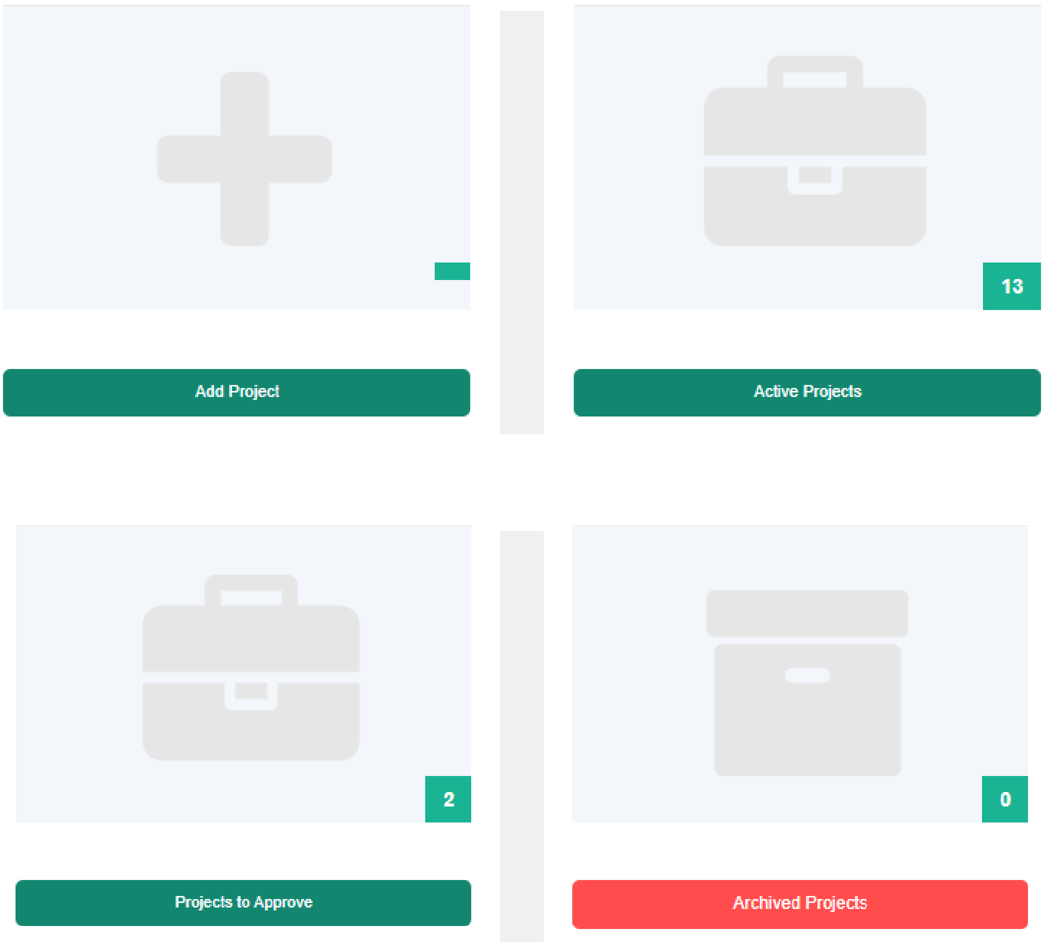
16.1 NIF-WA: Modification Overview

ACLS modification to meet NIF MRI facility requirements are carried out to deliver a specially tailored service for MRI, PET/CT facility including dealing with medical record data.

The integrated service provides web-based calenda, project, user, participant service, DICOM agent service, email notification and mobile messaging.

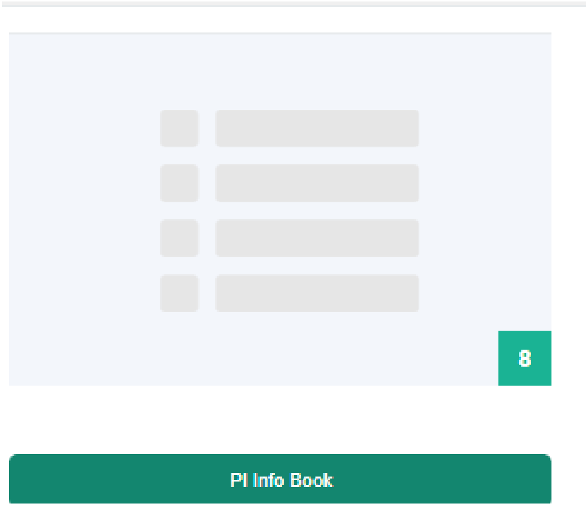
16.2 NIF-WA: Project manager

Project manager is to establish the research projects to cover the following associated properties. It is accessible by admin only (NIF Utility Tab -> Project Manager).



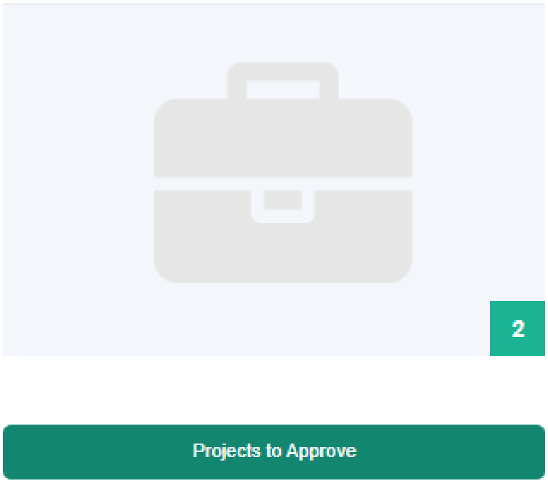
16.3 NIF-WA: Project manager: PI Info Book

This feature is for admin to access all PI data separately. When adding a new project, PI data are required as the first and compulsory data entry.



16.4 NIF-WA: Project manager: Projects to approve

If research projects are created by researchers, the final approval is required by admin.



Admin will validate the project data and approve the project draft submitted by researchers.
Project manager: Transfer project ownership

This feature is for admin only.

Project	EINSTEIN
Current Project Owner	
Select user/researcher to transfer project ownership	Choose user from the list

16.5 NIF-WA: Project manager: Project pre-blocked calendar time

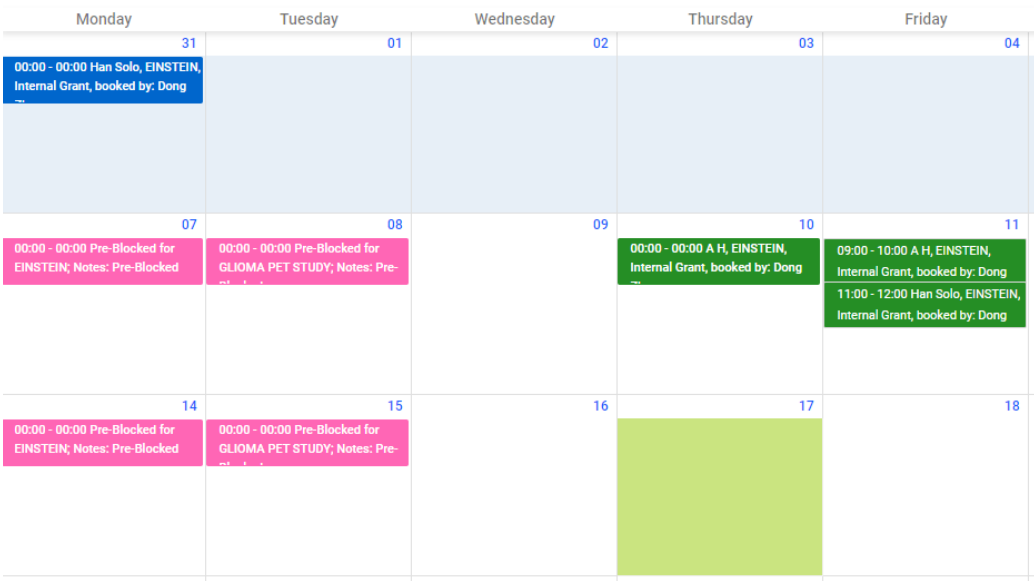
Project Pre-Blocked Calendar Time

Admin can define the pre-blocked time for project and resource, one session time per day. The pre-blocked session time is available as pink slot on calendar (refer to calendar chapter).

Resource: MRI (Vida 3T) | Resource: PET-CT (Biograph)

Resource	Project	Monday - Pre-Blocked	Tuesday - Pre-Blocked
MRI (Vida 3T)	EINSTEIN	0:00 - 0:00	Disabled

As shown above, for any resources, the calendar time from 0am to 0pm (end of day) on Monday is reserved for project EINSTEN.



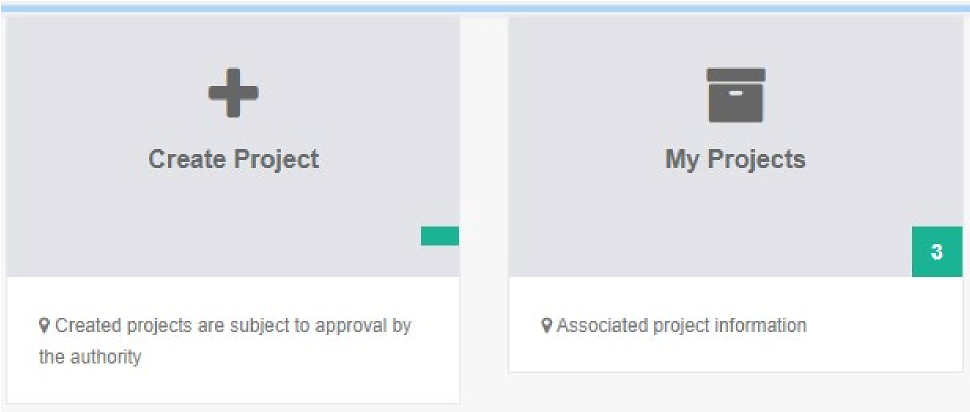
16.6 NIF-WA: Participant manager

Participant manager is for admin only (NIF Utility Tab -> User Participant Manager). The module is based on the following proposal items.

Admin can add participant, edit participant data and archive participant data. Participant data covers the following associated properties.

16.7 NIF-WA: Dashboard for user/researcher

Dashboard provides two features, create new project and manage the submitted projects for researchers, not admin. Researchers can submit the new project draft and edit the approved projects with the limited powers.



16.8 NIF-WA: Booking calendar: participant booking

Under Resource tab, admin and researcher can make bookings with the selected project, selected billing option and selected participant.

Today's booking:

It is a handy feature at Resource Tab landing page. The information on Today bookings is displayed differently depending on the different types of resources: MRI, PET-CT, CT and Others.

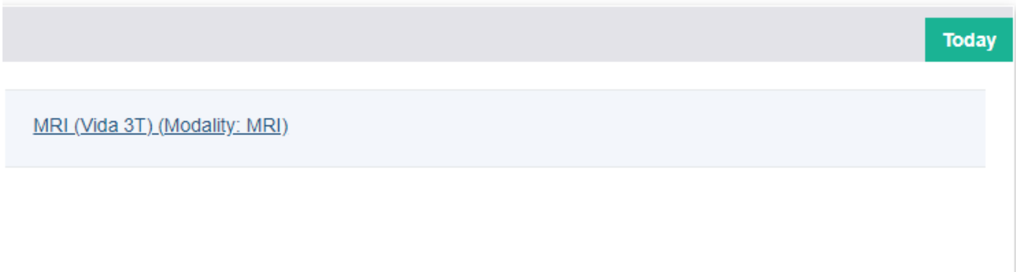
Per booking, show for the MRI:

- Project
- Modality
- Participant
- Anatomy
- Whether researcher will be present or not (from Project's "Scanning: MRI" tab)

Per booking, please show for the PET-CT:

- Project
- Modality
- Participant
- Anatomy
- Tracer (if PET)
- Whether researcher will be present or not (from Project's "Scanning: [modality]"

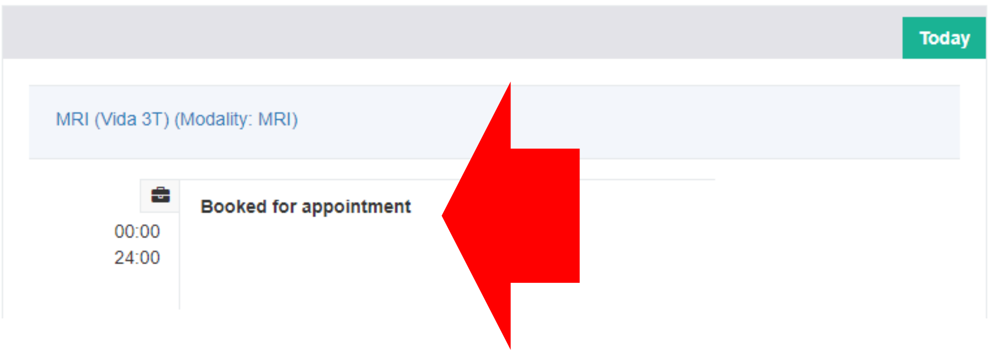
The resource name on Today page is also served as hyper-linked to access the calendar

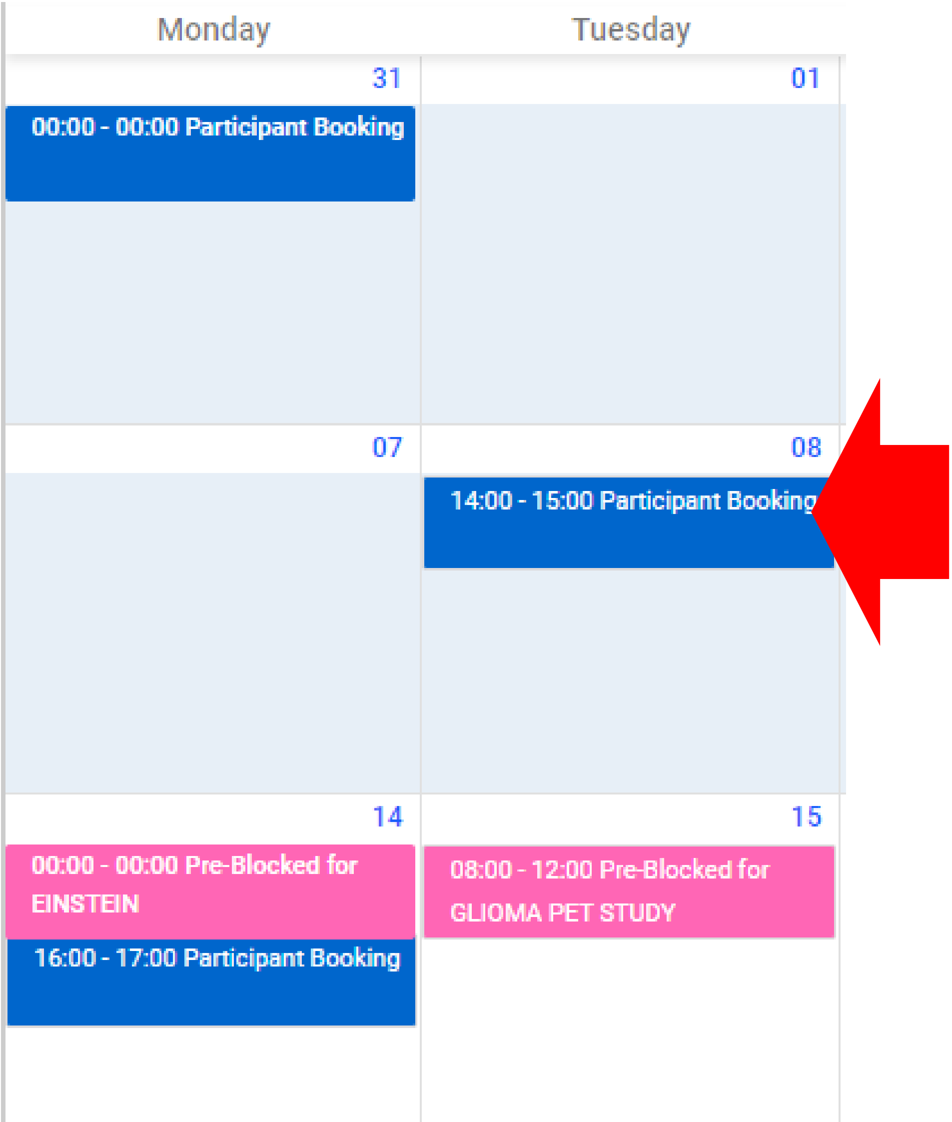


16.9 NIF-WA: Booking calendar: privacy enabled

The calendar privacy setting "EnableUserPrivacyCalendar" is enabled in the System Settings -> Configure System.

The privacy setting only applies to user/researcher when they access the calendars. User/researcher can see the appointment details for the bookings made by him or her.

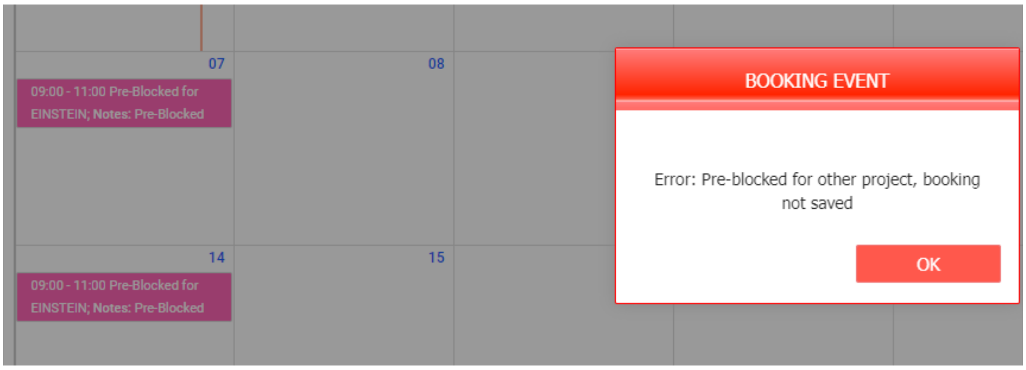




16.10 NIF-WA: Booking calendar: pre-blocked calendar time

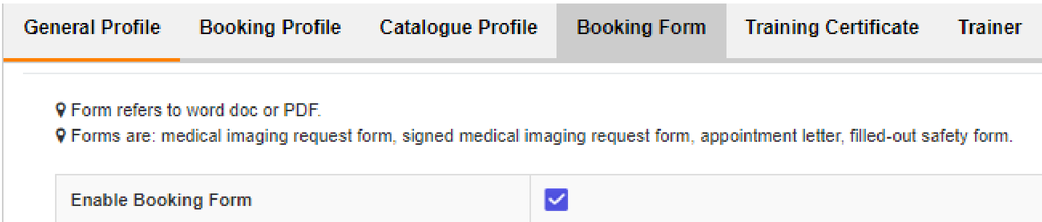
Admin can set up the project-based pre-blocked calendar time, one session per day in Project Manager.

The system automatically checks the booking project against the project of the pre-blocked calendar time. Only the same project booking will be accepted.



16.11 NIF-WA: Booking calendar: uploaded forms

First, admin needs to enable booking form for the selected resource in Resource Manager.



The following 4 types of forms are required once the form setting is enabled.

- Medical imaging request form
- Signed medical imaging request form
- Appointment letter (a pdf print-out of the html letter)
- Filled-out safety form

On the calendar, admin and researchers can make appointment booking first, then upload the forms at later stage or at the same time when making a new appointment.

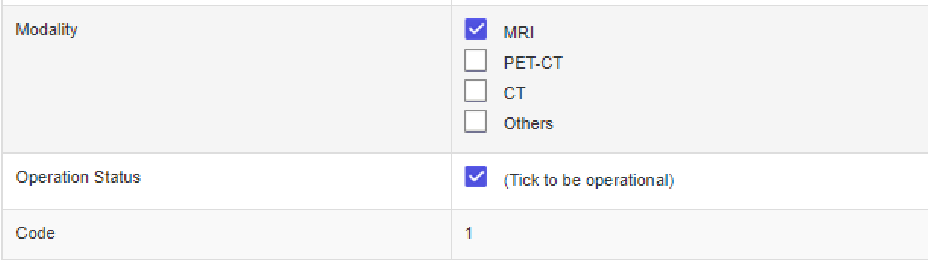
Click on Upload Form button to do so.

16.12 NIF-WA: Service booking calendar

As usual, used for equipment service booking, the service booking cancels any existing bookings falling into the service booking time, and auto sending cancellation emails to the participants and researchers.

16.13 NIF-WA: Resource manager: set up modality of resource

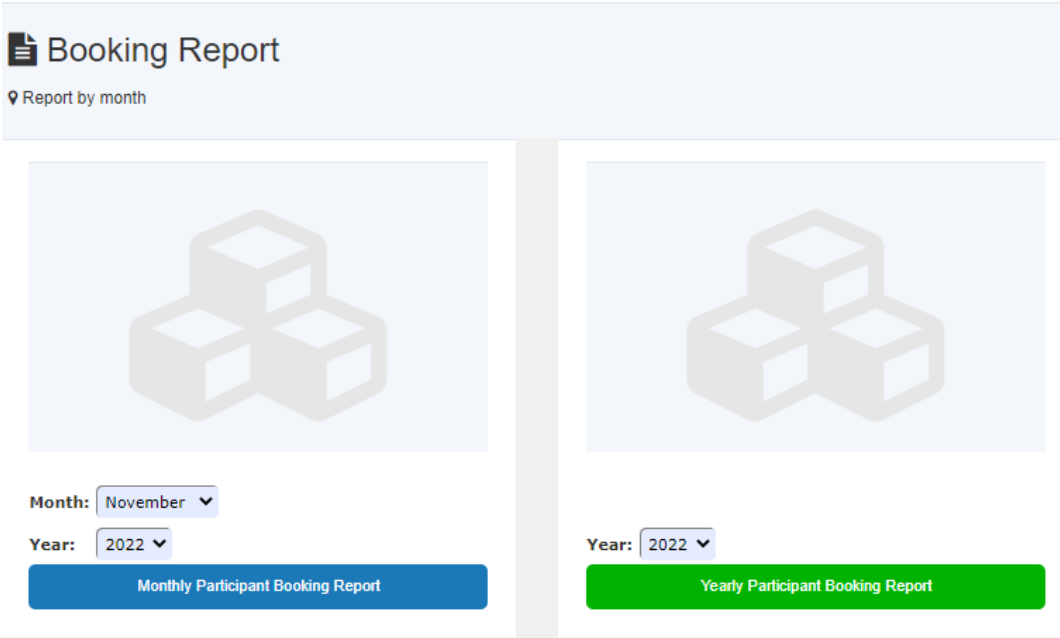
On general profile, admin can configure modality for the resources. The selection will be displayed together with resource name on calendar page.



Modality	☑ MRI ☐ PET-CT ☐ CT ☐ Others
Operation Status	☑ (Tick to be operational)
Code	1

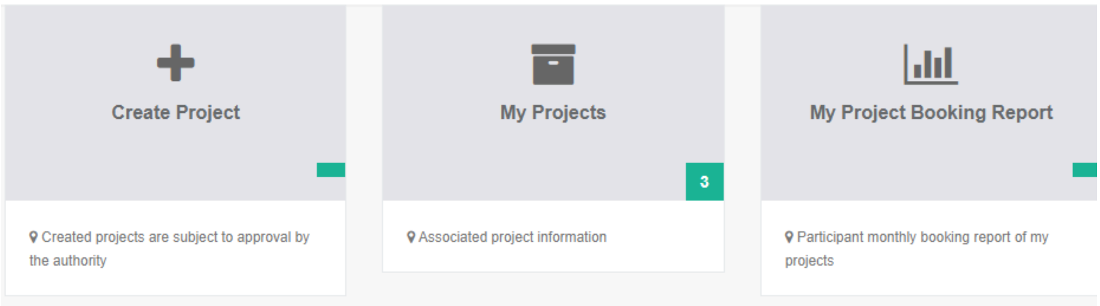
16.14 NIF-WA: Report - Admin: participant booking report

The current report is only accessible by admin. Go to Staff tab -> Reports to access monthly booking report.



16.15 NIF-WA: Report – User/Researcher: my project booking report

For users and researchers, they can access the similar booking report for their associated projects, the same as those listed in My Projects.



Admin booking report covers all the bookings, but my project booking report only shows the bookings associated with my projects, be project owner or nominated as researcher of the project.

16.16 NIF-WA: Institute

Admin can add and change organization at Staff tab -> Utility -> School Manager. Please notify ACLS team if you want to remove any organisations from the organisation dropdown list on the reg form.

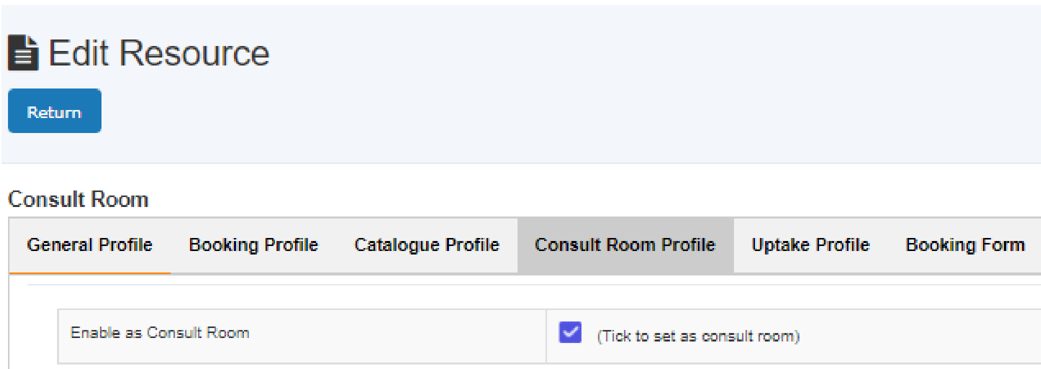
16.17 NIF-WA: WA NIF node staff

Please notify ACLS team if you want to remove any nif staff from the staff dropdown list on the reg form.

16.18 NIF-WA: Consult room set up and calendars

A new concept of consult room is introduced for private conversations between researcher/doctor and participant/patient before or after scanning

Admin can set up any resource as consult room type in Resource Manager. Go to Staff Tab -> Utility -> Resource Manager -> Edit -> Consult Room Profile to configure the resource as consult room.



Consult room calendar:

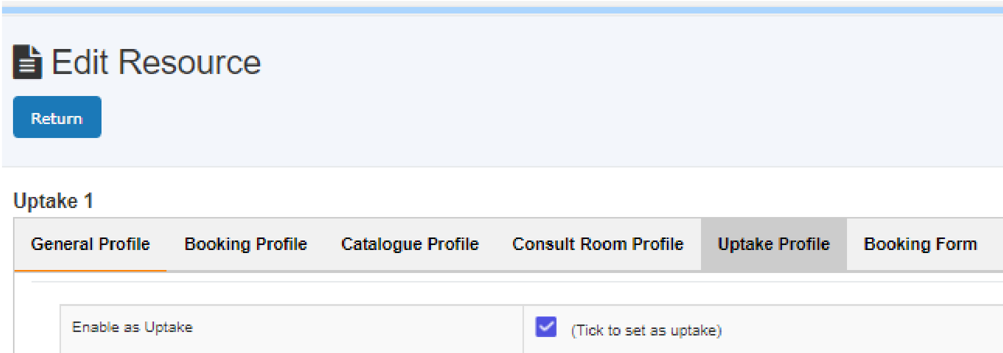
- Calendar is open to all users/researchers
- Select project and select participant
- Upon saving the booking, system sends out email notice and mobile text to the participant.

16.19 NIF-WA: Uptake room

A new concept of uptake room is introduced for safe and radiation-shielded room for a participant to wait after their PET tracer has been injected.

Uptake only applies with PET-CT.

Admin can set up any resource as consult room type in Resource Manager. Go to Staff Tab -> Utility -> Resource Manager -> Edit -> Uptake Room Profile to configure the resource as uptake room.



Uptake room calendars:

- By WA NIF node staff and superusers, not by researchers
- Uptake room calendar is the same as the consult room if admin books it manually.

Usually, uptake room being booked automatically when user/researcher books the PET-CT subject to the following project settings:

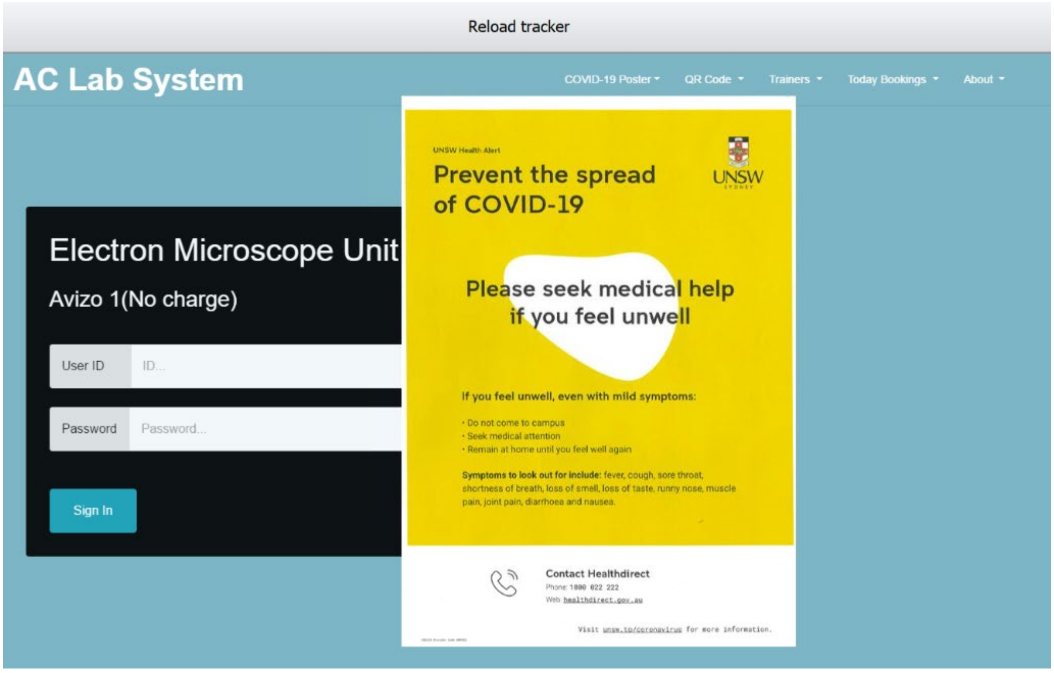
- For any PET-CT booking (resource: PET-CT (Biograph); modality: PET-CT)
- Check research project field “Does patient have to remain in uptake bay for uptake duration” in the ‘Scanning: PET-CT’ tab.
- If that field is “Yes”: Book an uptake bay for a time slot immediately prior to the PET-CT booking start time, with duration specified by the Research project field “Time between tracer injection and scan start (in minutes)” in the ‘Scanning: PET-CT’ tab
- Ensure during PET-CT scan booking that an uptake bay is indeed available that entire period

16.20 NIF-WA: PET-CT booking with uptake room

Upon selection of project, the information panel shows if “Does patient have to remain in uptake bay for uptake duration” is set to Yes or No. If Yes, then uptake room will be automatically booked.

17 Appendix I – ACLS Desktop Tracker App

ACLS Python Tracker is a cross-platform software desktop app written in Python which working with ACLS web server to provide a web-based desktop app. The tracker is to record user's usage of the instruments, to restrict instrument access, to alert any OHS related issues in lab to the lab staff through the email, to show the next booking on the current day booking calendar, to show trainer contacts, to provide QR code for mobile device to scan and check lab resources, and also poster feature which is useful for today's COVID-19 outbreak.



17.1 Working Mechanism of Tracker with ACLS Server

Through the tracker, you can implement a secured access to instrument or equipment by "No Login, No Operation" policy.

Before user can operate the instrument or equipment, he needs to login through the tracker. The tracker checks if user has a valid account, if user has the valid certificate to operate the equipment by himself or require the supervision of the staff member before permitting. During the period of operation or experiment, user can record the experimental notes, see the next booking to better manager his time of operation, and receive the notification sent by staff.

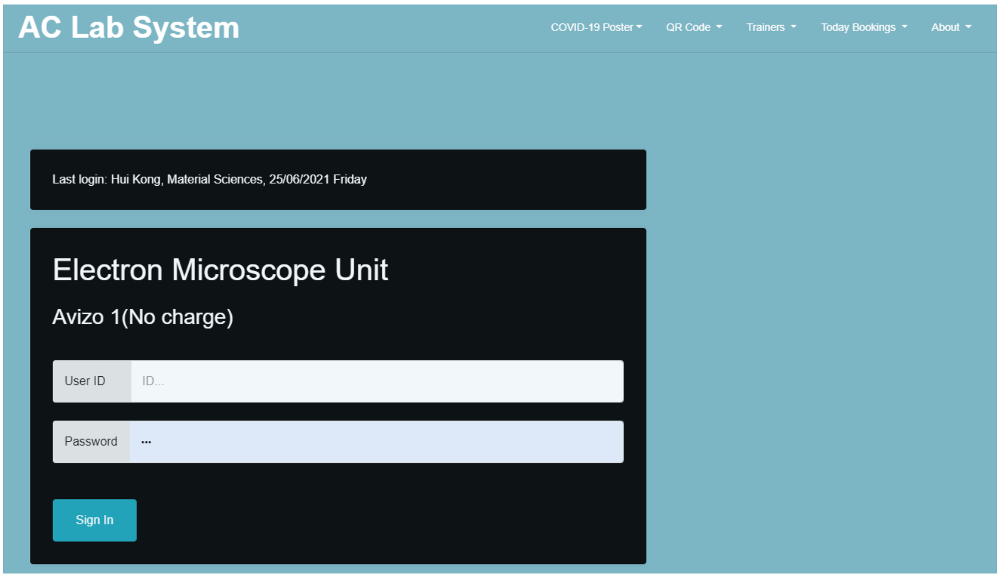
17.2 Tracker Operation

- Login process

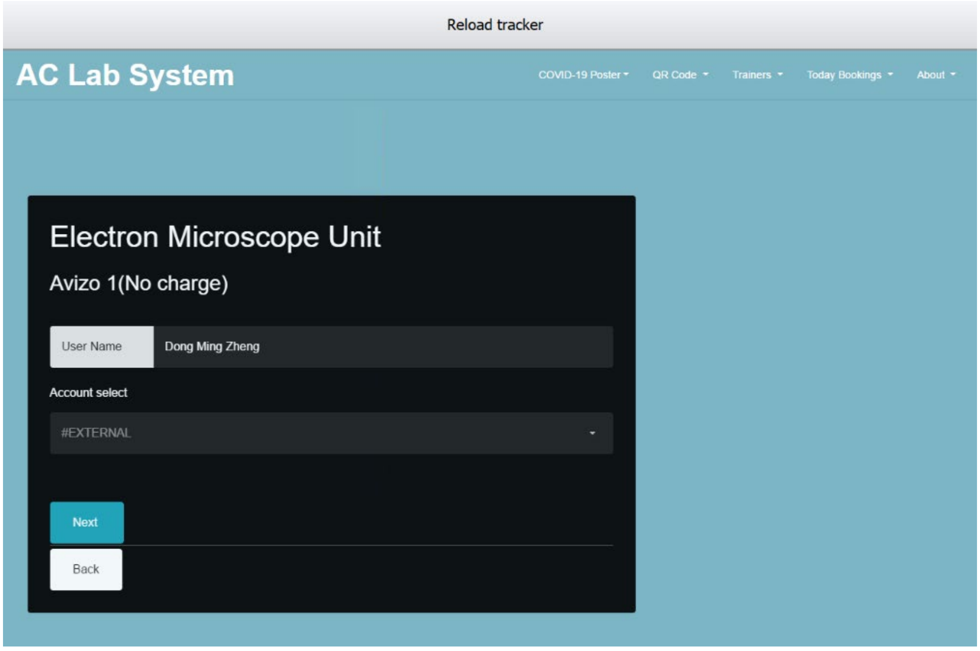
  Upon executing the tracker program, home page shows up as illustrated below. Home page indicates the following information:

  - Reload tracker: click Reload tracker button to refresh the home login page if you encounter any issues

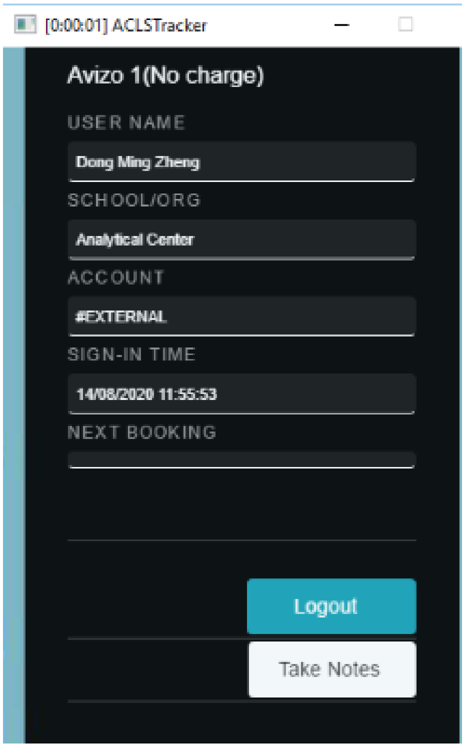
- COVID-19 Poster: this is the default setting in ACLS resource manager. It can be customised by lab to set up different posters
- QR code: use mobile phone to scan QR code and access to resource dashboard
- Trainer: show the trainer contacts
- About: app name and version
- Lab name: ACLS Demo in the snapshot
- Resource name: 3D camera in the snapshot
- Last login: show last login user name, school or organisation name and login day timestamp



- Enter User ID and Password to sign in.
- Depending on the tracker settings in ACLS resource manager, you might need to select account or project to continue.

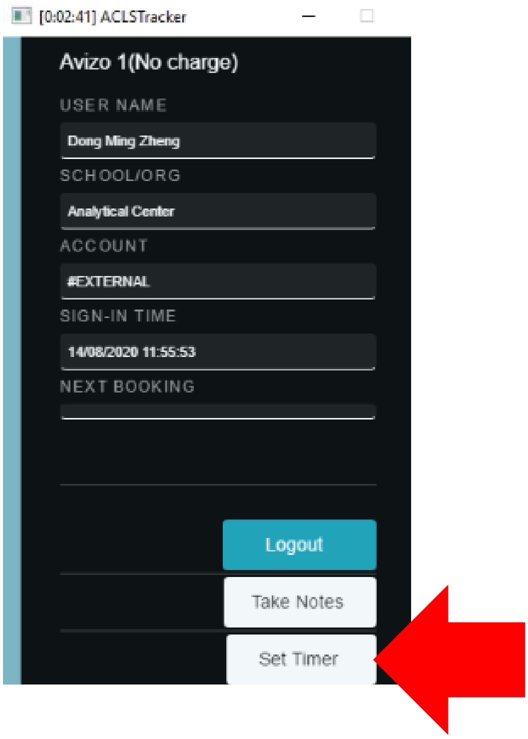


- Upon accepting the login, Tracker stays at the top corner of the right-hand side of the screen. Tracker shows the escaped time at the tracking app bar.

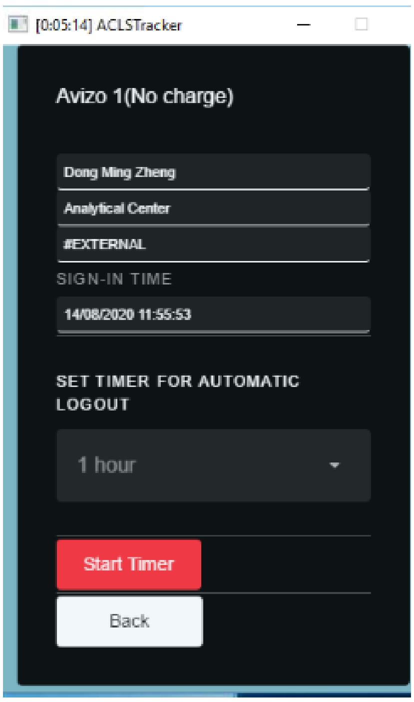


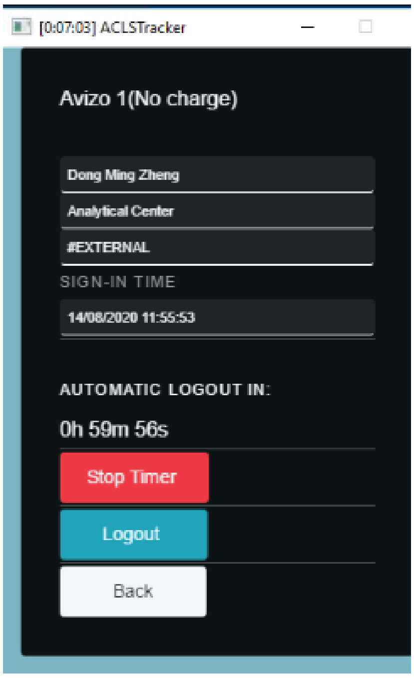
- Logout timer (optional)

A logout timer can be activated to logout the tracker automatically when timer runs out of the pre-set hours. It is featured to give the option control to the labs where instrument or equipment operation may need to end at midnight without the human interference.



- Select the desired hours, and click ‘Start Timer’ to begin the countdown. Tracker logs out user automatically when countdown ends.

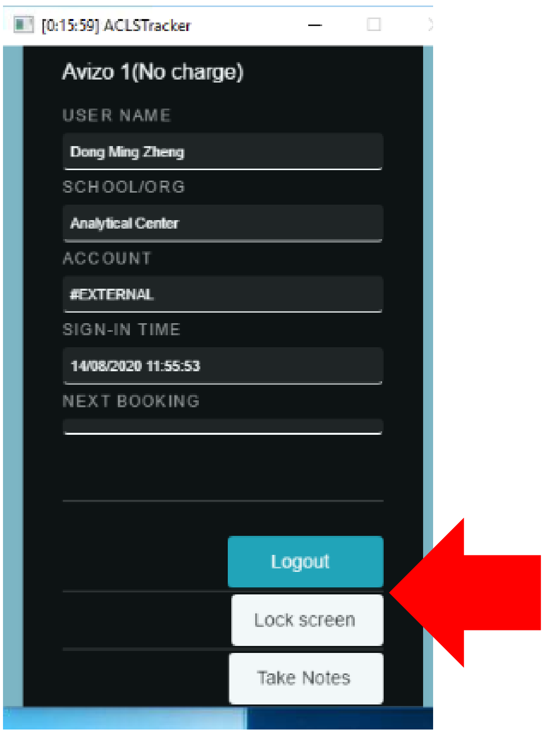




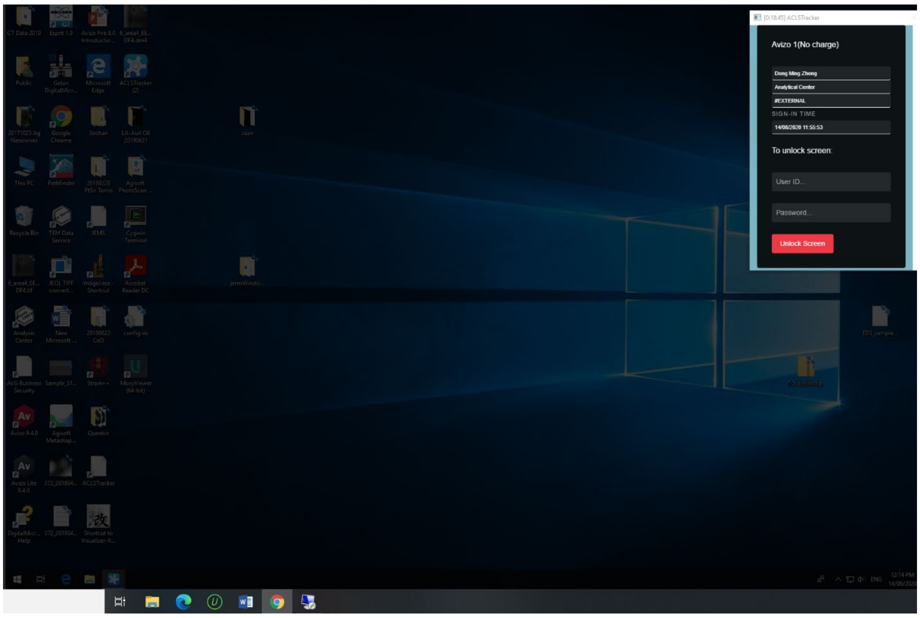
To stop timer, simply click on 'Stop Timer'.

- Lock screen (optional)

Lock-screen feature is available as an option. The lock screen is useful for staff and users to lock screen while they are away for lunch break or any other short break. Staff can unlock screen anytime no matter whoever login.



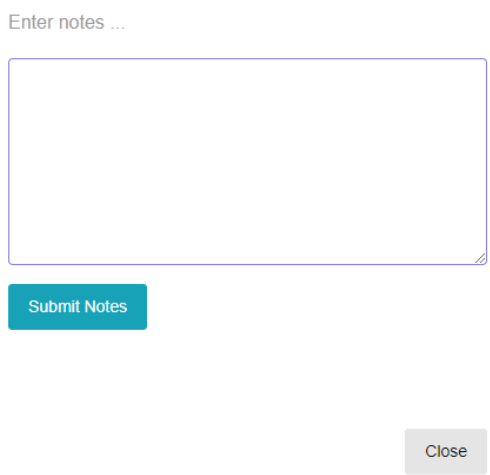
Click Lock Screen to get the screen locked. The entire screen becomes semi-transparent in lock-screen mode.



- Record Notes

  You can record and submit notes during an experiment by clicking the ‘Note’ button.

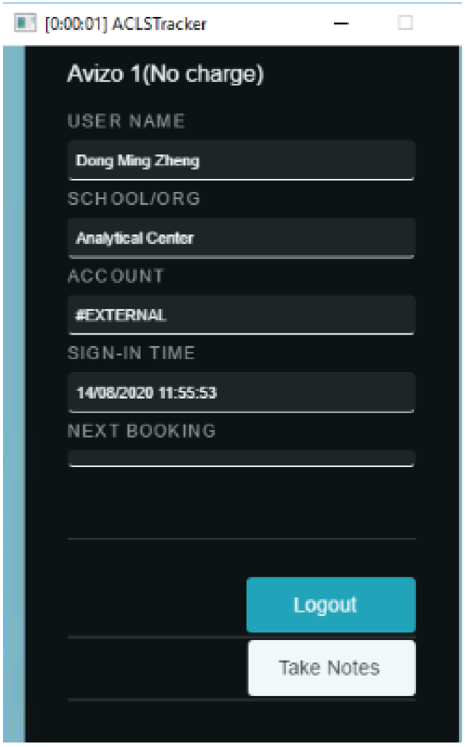
  Enter your experiment notes in the textbox provided and click ‘Submit’ to save the notes.



The user can make simple notes by clicking the ‘Submit Notes’ button. Once the submit button is clicked the note will be submitted to the server, saved and available in ACLS web tracker notes.

- Logging Out

  Once you are finished using the instrument, click the 'Logout' button to terminate the session.



17.3 Tracker Configuration in ACLS Web Portal

This is for lab admin or system administrator to set up. Login to ACLS, go to Resource Manager to edit the resource property.

The obsolete Java tracker is still on the page for information. The new tracker is configured with the Python tracker page. Here is the explanation of the configuration parameters.

Field	Description
Resource	Resource installed with console
Host ID	Host ID shows at each console upon installation. System generates a random one the very first time.
ID Type	Host ID as resource ID.
Block hot-keys	Tracker blocks all Windows hot keys by default so users cannot bypass tracker with the Windows hot-keys
Block task manager	Block or unblock the Windows task manager so users cannot kill off tracker instance
Enable account/project selection	Enable/disable account/project selection. If resource is free of charges, you can disable this option for tracker.

Enable locking screen	Enable/disable locking screen feature. The locking screen is useful for users to tentatively lock up the screen while away for a short break. Staff members can unlock anytime.
Enable Show Last Login User	Enable/disable showing the last login user name on the tracker so the staff and the next user could know who did last login
Enable auto-logout	Enable/disable auto-logout. This feature is useful to prevent users forgetting logout tracker. When the pre-set time interval is reached, tracker logout automatically.
Auto-logout hours	Define auto-logout hours for auto-logout, the tracker signs out the user automatically after the auto-logout hours exceed
Enable full-screen mode	Enable/disable the tracker full-screen mode upon execution so the user must sign in the tracker to operate the instrument (resource)
Enable booking first policy	Enable/disable the special requirement that the user must book first before the user could sign in the tracker to operate the instrument (resource). Enabling this feature is to ensure that you capture the usage of the resource if the user walk in to the lab and use the instrument without making the booking first.
Enable data drive mapping	UNSW only
Enable email for sign in and sign out	If enabled, user and trainers receives email notice upon user sign in and out on tracker app
Enable sensor app execution with tracker	If enabled, ACLS sensor app being integrated with tracker app, scans and collects resource desktop computer hardware and software information
Enable Windows account logoff	If enabled, signing out of the tracker will also sign out of Windows.
Enable logoff Windows account button on tracker app login page	If enabled, the tracker login page will show an additional button that signs out of Windows.
Connection Allowed	Enable/disable connection permission. If unchecked, server declines the tracker connection request
Note	Notes relating to the console settings.

Since the tracker is web based, a web URL is available for demo purpose, or used for the other devices such as tablets. Please contact us for the further discussion if you want to run the tracker for the non-computerised equipment or tools.

- The tracker adds back the missing logout when the next user login. However, this might cause the incorrect usage time. For example, user A login at 12pm, then reboot pc when leaving without logout at 1pm. User B login at 3pm, tracker automatically adds the logout for user A at 3pm instead of 2pm.
- Connection logs are available for cross-check for the situation that users might reboot pc after usage and system logs the longer time session than the actual usage.

17.4 ACLS Tracker Status

You can check tracker status including installation status, connection status and IP address of the connected equipment/devices and tracker version.

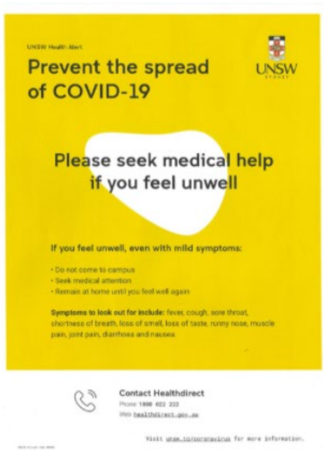
Resource	IP Address	Tracker Installation	Tracker Connection	Tracker Version
Avizo 1(No charge)	129.94.164.57	Installed	Connected	0.7
Avizo 2(No charge)	129.94.164.77	Installed	Connected	0.7
EPMA 8500	129.94.165.3	Installed	Connected	0.7
FIB Auriga	129.94.164.105	Installed	Connected	0.7
FIB Auriga - Oxford	129.94.165.77	Installed	Connected	0.7
FIB NanoLab	129.94.164.64	Installed	Connected	0.7
Leica Lift-Out	129.94.165.181	Installed	Connected	0.7

17.5 ACLS Poster

You can change poster menu and poster image at tracker status page.

Post Menu Name	COVID-19 Poster	(if you set to none, the poster menu is disabled on tracker menu)

Accept



Upload Poster Image (jpg)

17.6 ACLS Tracker Server

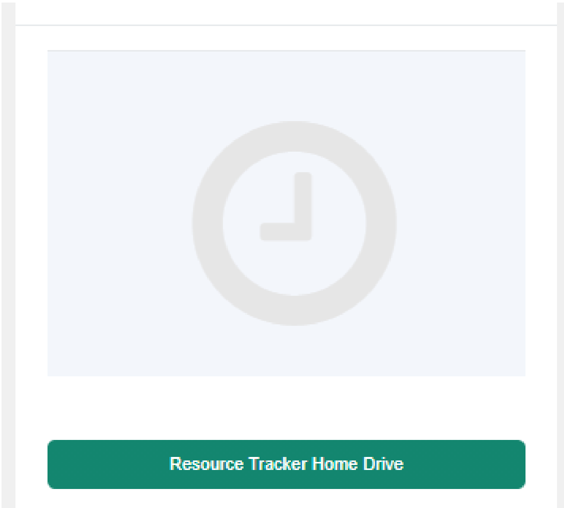
ACLS tracker server requires the special configuration with Abyss Web Server X2. ACLS tracker is web based and https connection on the separate port. Please contact ACLS team for assistance.

17.7 ACLS Sensor: keeping track of user folders

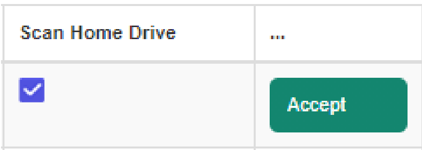
If automatic folder creation is enabled (see previous section), then the ACLS Sensor feature can be enabled in order to keep track of user folders. The folders are regularly scanned by ACLS Sensor to keep track of how large they are. This information is uploaded to the ACLS website, allowing you to keep track of disk usage on each lab computer.

To enable ACLS Sensor:

- Log into ACLS
- Navigate to Staff, then Utilities -> Resources, then “Resource Tracker Home Drive” at the bottom



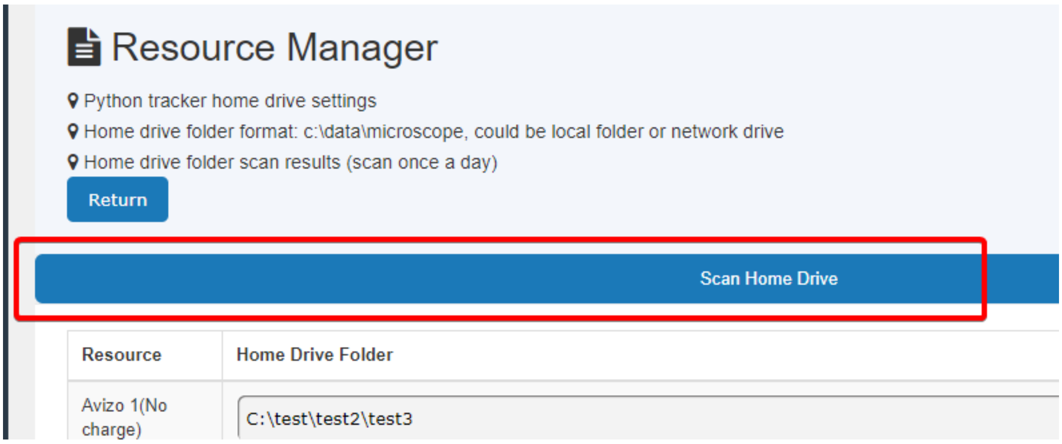
- For each resource that you want this feature enabled on, tick “Scan user data folder”



- Press Accept

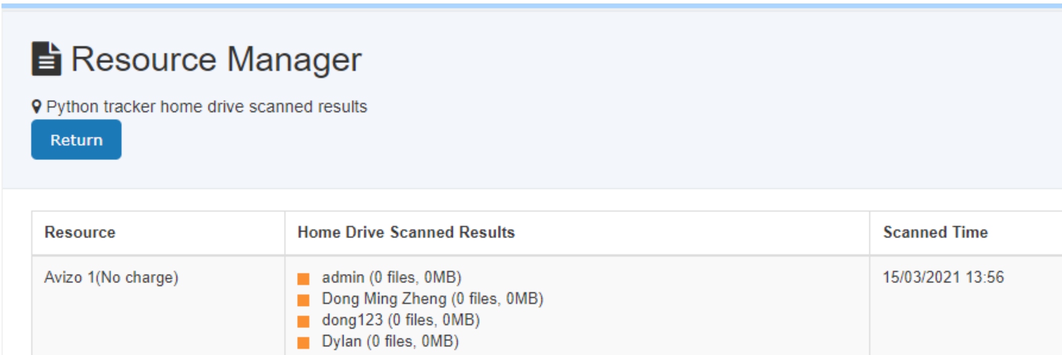
ACLS Sensor scans once every 24 hours. The scan takes place overnight.

To view scan results, press “Scan Home Drive” on the Resource Tracker Home Drive page.



This will take you to a page showing:

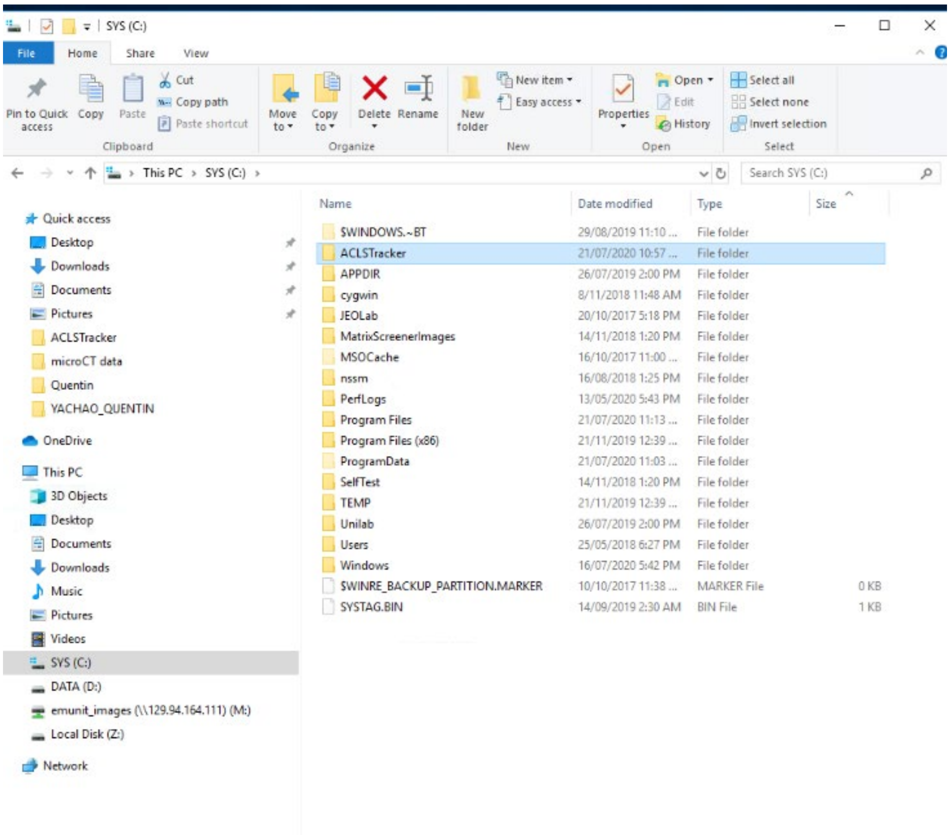
- User folders
- The size of each user folder
- The number of files in each user folders
- Scan time
- Last 30 days scan logs: By clicking this button, you will see a list of all scans in the last 30 days.

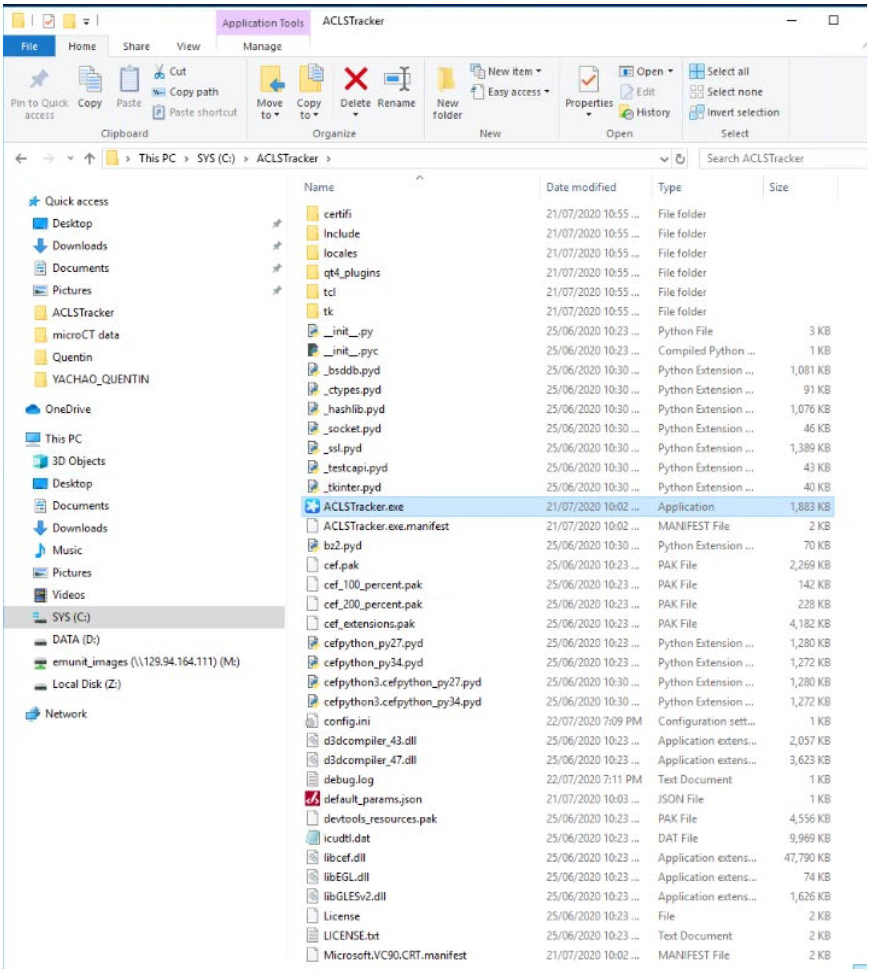


17.8 ACLS Tracker Installation: Windows XP/7/8/10

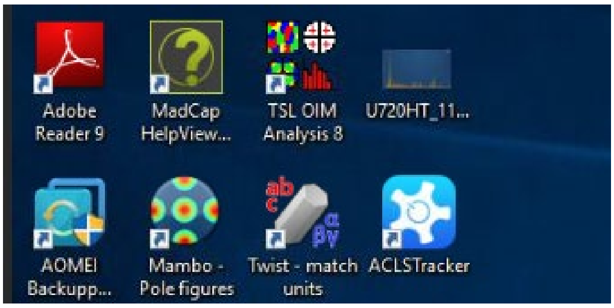
ACLS tracker can be downloaded with the dedicated download link provided by ACLS team. Please contact ACLS team if you want to try out.

Upon download, unzip the package, Copy ACLSTracker to System Drive C. The new python tracker does not require installation, it simply double click and run.


SYS (C:)
File
Home
Share
View
Pin to Quick access
Copy
Paste
Cut
Copy path
Paste shortcut
Clipboard
Move to
Copy to
Delete
Rename
Organize
New folder
New item
Easy access
New
Properties
Open
Edit
History
Select all
Select none
Invert selection
Select
This PC › SYS (C:) ›
Search SYS (C:)
Quick access
Desktop
Downloads
Documents
Pictures
ACLSTracker
microCT data
Quentin
YACHAO_QUENTIN
OneDrive
This PC
3D Objects
Desktop
Documents
Downloads
Music
Pictures
Videos
SYS (C:)
DATA (D:)
emunit_images (\\129.94.164.111) (M:)
Local Disk (Z:)
Network
Name | Date modified | Type | Size
$WINDOWS.~BT | 29/08/2019 11:10 ... | File folder
ACLSTracker | 21/07/2020 10:57 ... | File folder
APPDIR | 26/07/2019 2:00 PM | File folder
cygwin | 8/11/2018 11:48 AM | File folder
JEOLab | 20/10/2017 5:18 PM | File folder
MatrixScreenerImages | 14/11/2018 1:20 PM | File folder
MSOCache | 16/10/2017 11:00 ... | File folder
nssm | 16/08/2018 1:25 PM | File folder
PerfLogs | 13/05/2020 5:43 PM | File folder
Program Files | 21/07/2020 11:13 ... | File folder
Program Files (x86) | 21/11/2019 12:39 ... | File folder
ProgramData | 21/07/2020 11:03 ... | File folder
SelfTest | 14/11/2018 1:20 PM | File folder
TEMP | 21/11/2019 12:39 ... | File folder
Unilab | 26/07/2019 2:00 PM | File folder
Users | 25/05/2018 6:27 PM | File folder
Windows | 16/07/2020 5:42 PM | File folder
$WINRE_BACKUP_PARTITION.MARKER | 10/10/2017 11:38 ... | MARKER File | 0 KB
SYSTAG.BIN | 14/09/2019 2:30 AM | BIN File | 1 KB


Application Tools
ACLSTracker
File
Home
Share
View
Manage
This PC › SYS (C:) › ACLSTracker ›
Search ACLSTracker
Name | Date modified | Type | Size
certifi | 21/07/2020 10:55 ... | File folder
include | 21/07/2020 10:55 ... | File folder
locales | 21/07/2020 10:55 ... | File folder
qt4_plugins | 21/07/2020 10:55 ... | File folder
tcl | 21/07/2020 10:55 ... | File folder
tk | 21/07/2020 10:55 ... | File folder
__init__.py | 25/06/2020 10:23 ... | Python File | 3 KB
__init__.pyc | 25/06/2020 10:23 ... | Compiled Python ... | 1 KB
_bsddb.pyd | 25/06/2020 10:30 ... | Python Extension ... | 1,081 KB
_ctypes.pyd | 25/06/2020 10:30 ... | Python Extension ... | 91 KB
_hashlib.pyd | 25/06/2020 10:30 ... | Python Extension ... | 1,076 KB
_socket.pyd | 25/06/2020 10:30 ... | Python Extension ... | 46 KB
_ssl.pyd | 25/06/2020 10:30 ... | Python Extension ... | 1,389 KB
_testcapi.pyd | 25/06/2020 10:30 ... | Python Extension ... | 43 KB
_tkinter.pyd | 25/06/2020 10:30 ... | Python Extension ... | 40 KB
ACLSTracker.exe | 21/07/2020 10:02 ... | Application | 1,883 KB
ACLSTracker.exe.manifest | 21/07/2020 10:02 ... | MANIFEST File | 2 KB
bz2.pyd | 25/06/2020 10:30 ... | Python Extension ... | 70 KB
cef.pak | 25/06/2020 10:23 ... | PAK File | 2,269 KB
cef_100_percent.pak | 25/06/2020 10:23 ... | PAK File | 142 KB
cef_200_percent.pak | 25/06/2020 10:23 ... | PAK File | 228 KB
cef_extensions.pak | 25/06/2020 10:23 ... | PAK File | 4,182 KB
cefpython_py27.pyd | 25/06/2020 10:23 ... | Python Extension ... | 1,280 KB
cefpython_py34.pyd | 25/06/2020 10:23 ... | Python Extension ... | 1,272 KB
cefpython3.cefpython_py27.pyd | 25/06/2020 10:30 ... | Python Extension ... | 1,280 KB
cefpython3.cefpython_py34.pyd | 25/06/2020 10:30 ... | Python Extension ... | 1,272 KB
config.ini | 22/07/2020 7:09 PM | Configuration sett... | 1 KB
d3dcompiler_43.dll | 25/06/2020 10:23 ... | Application extens... | 2,057 KB
d3dcompiler_47.dll | 25/06/2020 10:23 ... | Application extens... | 3,623 KB
debug.log | 22/07/2020 7:11 PM | Text Document | 1 KB
default_params.json | 21/07/2020 10:03 ... | JSON File | 1 KB
devtools_resources.pak | 25/06/2020 10:23 ... | PAK File | 4,556 KB
icudtl.dat | 25/06/2020 10:23 ... | DAT File | 9,969 KB
libcef.dll | 25/06/2020 10:23 ... | Application extens... | 47,790 KB
libEGL.dll | 25/06/2020 10:23 ... | Application extens... | 74 KB
libGLESv2.dll | 25/06/2020 10:23 ... | Application extens... | 1,626 KB
License | 25/06/2020 10:23 ... | File | 2 KB
LICENSE.txt | 25/06/2020 10:23 ... | Text Document | 2 KB
Microsoft.VC90.CRT.manifest | 21/07/2020 10:02 ... | MANIFEST File | 2 KB

Create a shortcut to the desktop

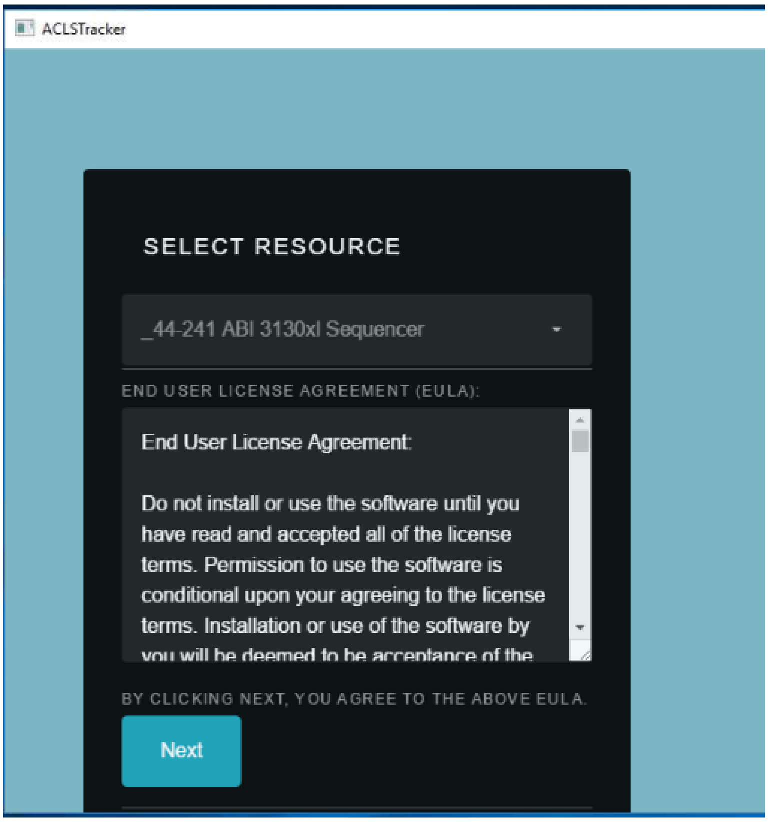


Set up ACLS tracker as the startup program app.

- Press START + R to open the Windows Run window.
- Type in “shell:startup” and press OK.
- Copy the desktop shortcut and paste it in this folder.

This will make the computer run ACLS Tracker automatically every time it turns on.

- For the first time run, tracker brings up the resource selection page, simply select and save the selection, and close the tracker. If the resource is not listed, you need to go to ACLS web portal to check the resource tracker settings s described in the Tracker Configuration chapter.



- Tracker is ready to run.

17.9 Disable Task Manager for Windows 7 and Windows 10

The tracker needs administrator rights to disable the task manager on Windows 7 and Windows 10. Instead, you can manually disable it by following these instructions.

- Press WINDOWS key and R (WIN+R) to open the Run window.
- Type in regedit.exe and press OK.
- Click and expand the folder named 'HKEY_CURRENT_USER'.
- Click and expand the folder named 'Software'.
- Click and expand the folder named 'Microsoft'.
- Click and expand the folder named 'Windows'.
- Click and expand the folder named 'CurrentVersion'.
- Click and expand the folder named 'Policies'.
- Click and expand the folder named 'System'.
- On the right panel, double click 'DisableTaskMgr' and change the value data from 0 to 1. Press OK.

NOTE: If there is no 'DisableTaskMgr' in the right panel, then follow these steps:

- Right click an empty space in the right panel.
- Select New > DWORD.
- Give it the name DisableTaskMgr.

To re-enable task manager, follow the above steps but in step 10, change the value data from 1 to 0 instead.

17.10 ACLS Tracker for Linux

ACLS Tracker is available to run on Linux platforms such as Ubuntu and CentOS. Please contact the ACLS team if you would like to inquire about specific Linux platforms.

The Linux tracker supports the main ACLS Tracker functionality of logging in and tracking login time.

The Linux Tracker does not support the following advanced features:

- Automatic network drive mounting
- Hotkey blocking
- Automated folder creation and ACLS Sensor functionality

ACLS Tracker Installation: CentOS 7:

ACLS tracker can be downloaded with the dedicated download link provided by ACLS team. Please contact the ACLS team for a download link at acls.analytical@unsw.edu.au

- Place the application folder in the home directory (/home/[user])
- Open the terminal
- This step will add a desktop launcher for ACLS Tracker.
  Type and run "sudo nano /home/[user]/Desktop/ACLSTracker.desktop", substituting [user] with the user of your account.
- In the text editor that appears, type in the following bolded block. Substitute [user] with the user of your account. When you finish, save the file by pressing CTRL+O and then enter. Then exit by typing CTRL+X.

  [Desktop Entry]

  Type=Application

  Name=ACLS Tracker

  Icon=/home/[user]/ACLSTracker-0.8.3-CentOS7/icon.png

  Exec=/home/[user]/ACLSTracker-0.8.3-CentOS7/ACLSTracker
- Run the desktop launcher at least once, and select Trust so that the launcher will be usable. If the application fails to launch, see the troubleshooting section.
- This step will make ACLS Tracker launch automatically on login, so it can be skipped if it is not required.
  Type and run "sudo nano /etc/xdg/autostart/ACLSTracker.desktop".
- In the text editor that appears, type in the following bolded block. Substitute [user] with the user of your account. When you finish, save the file by pressing CTRL+O and then enter. Then exit by typing CTRL+X.

  [Desktop Entry]

  Type=Application

  Name=ACLS Tracker

  Icon=/home/[user]/ACLSTracker-0.8.3-CentOS7/icon.png

  Exec=/home/[user]/ACLSTracker-0.8.3-CentOS7/ACLSTracker

  X-GNOME-Autostart-enabled=true

Troubleshooting (Linux):

Confirm the tracker is compatible with the operating system by manually running it. This can be done by opening a terminal and running "/home/[user]/ACLSTracker-0.8.3-CentOS7/ACLSTracker".

If the tracker is able to run manually, then ensure the [Desktop Entry] files are formatted correctly.

If the tracker does not run manually, then the Linux system may not have the correct package prerequisites. These prerequisites are met by most Linux distributions, but some systems may not meet requirements.

One required package is libXScrnSaver. This is a small utility package with few requirements and it comes preinstalled on most Linux systems, so it should not cause any disruption to existing systems. It can be installed through a package manager e.g On CentOS, type and run “sudo yum install –y libXScrnSaver”.

17.11 Tracker Troubleshooting

Tracker can’t connect to the ACLS tracker server, why? There are several causes for that as followings:

- Loss of network
- Tracker server down
- Tracker server reject tracker request due to the wrong Host ID setting in tracker configuration file
- Firewall of network

18 Appendix O – ACLS Desktop Sensor App

18.1 Overview

ACLS Sensor is an application that gathers system information about your lab resource. The resulting report is automatically uploaded to ACLS. Examples of the gathered information include the following data:

Operating system, CPU info, memory, disk usage, installed software.

ACLS Sensor can be downloaded as a standalone application that you can run on any computer.

Additionally, ACLS Sensor comes pre-installed with ACLS Tracker. The ACLS Tracker can be used to automatically run ACLS Sensor on regular intervals.
Note: This documentation applies to ACLS Sensor version 2.0 onwards. If your copy of ACLS Sensor does not contain a version number, or contains a version number lower than 2.0, then this document will not be accurate.

18.2 Scanned Data

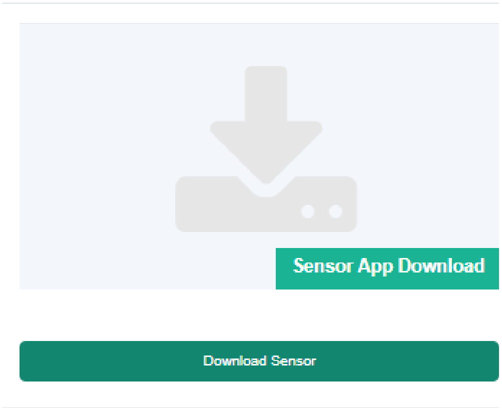
After running ACLS Sensor on a computer, the sensor will acquire the following information:

Acquired Information	Description
Device Name	The name of the device, as given by Windows.
Windows Edition	Info about the operating system e.g Is it Windows xp or Windows 11?
RAM	The amount of installed ram (system memory).
CPU	Info about the installed CPU.
GPU	A list of all installed graphics cards
Physical Disks	Information about the storage e.g. How many TB of storage is installed.
Logical Disks	Information about available storage e.g How many TB of storage is available to use.
Users	Information about the computer’s accounts e.g Which accounts have admin permissions?
Software	A list of all installed software.

18.3 Operation (via ACLS Sensor app)

18.3.1 Online operation:

- Download the ACLS Sensor application from ACLS (available to all staff members in ACLS node). Login to ACLS, go to ***Staff tab -> Utility -> Resource Tracker & Sensor Manager -> Download Sensor***.



- Unzip the downloaded zipped file, and copy ACLSSensor folder to the C drive.
- Run ACLSSensor.exe to start the application.
- Enter your ACLS login name and press sign in.
- Enter the one-time login code that was sent to your email and continue.
- Provide the name of the lab resource associated with this computer.
    - If you are a staff member, you can pick from a list of resources registered with ACLS. If the resource isn't registered, you may provide a name instead.
    - If you are not a staff member, you must provide the name of the resource.
    - If the sensor has already been run before, it will skip this step and reuse the previously entered details. You are given the option to redo these steps if this prefill information is inaccurate.
- Press start scan. This will run the scan and upload the report results to ACLS.
    - The application will tell you if the scan is successful or not. If it is not successful, it will give the option to reattempt the upload.
    - The application will also save a local copy of the results into the Documents folder. The application provides a shortcut to this folder.
    - You can also review the results of the scan directly from the application.

18.3.2 Offline operation:

If the resource computer is under restricted network access, you can follow these instructions to run the tracker in offline mode. In offline mode, you will be able to run the scan without signing in, but you will have to manually upload the scan results to ACLS.

- Download the ACLS Sensor application from ACLS.
- Press "Use in offline mode" and read the notice.
- Provide the name of the lab resource associated with this computer.
    - You must provide the name of the resource. If the resource is already registered in ACLS, give the same name here.

    - If the sensor has already been run before, it will skip this step and reuse the previously entered details. You are given the option to redo these steps if this prefill information is inaccurate.
- Press start scan. This will run the scan and save the results into the Documents folder. The result is not uploaded to ACLS.
- Press "Open Output Folder" to open the folder which contains the results.
- Copy the latest scan result to a computer with internet access (e.g via usb or via network drive).
- Log into ACLS and navigate to Staff > Utilities > Resource Tracker & Sensor Management > Sensor Scan Result Upload
- Upload the result file.

18.4 Sensor Feature Built-in ACLS Tracker

Applicable to ACLS Tracker v0.10 onwards.

ACLS Tracker comes with ACLS Sensor built in. If ACLS Tracker is installed on a resource computer, you can enable or disable ACLS Sensor scans via the ACLS web portal.

This functionality is included in ACLS Tracker versions starting from v0.10. You can view the version of your installed tracker via the "tracker version" menu on the tracker home page, or through the tracker dashboard on the ACLS web portal.

To enable ACLS Sensor functionality via ACLS Tracker, go to the ACLS web portal and navigate to Staff > Utilities > Resource Tracker & Sensor Management > Installed Resource Tracker Status > [Your resource name]'s Edit Tracker Status Button

On this page, tick "Enable sensor app execution with tracker" and press Accept. After the functionality is enabled from the website, you will have to restart the computer that the tracker is running on.

This will enable daily sensor scan and uploads from the resource computer. The results are automatically uploaded to ACLS Sensor once a day around midnight.

18.5 Viewing Sensor Results

Scan results are available on the ACLS web portal.

Navigate to ***Staff > Utilities > Resource Tracker & Sensor Management > Installed Resource Tracker Status > Resource Sensor Scan Report***

This table displays the most recent scan result for each resource. This report includes all scanned fields as described earlier.

If you would like to see the scan history of a particular resource, click on "View Scan History". Additionally, clicking "Resource Windows Chart" will display a percentage breakdown of the various Windows systems installed across the faculty. The "Resource Details" will display the relevant devices for that operating system.

19 Appendix K – About LDAP Implementation

The Lightweight Directory Access Protocol (LDAP) is an application protocol for accessing and maintaining distributed directory information services over an Internet Protocol (IP) network.

What is the implication of LDAP implementation?

It means that you can achieve a single authentication access for ACLS in your organization. For example, we run 11 copies of ACLS at UNSW, with LDAP a researcher can simply use one university-wide login ID and Password to access ACLS regardless of which ACLS copy they intend to access.

The benefits of ACLS LDAP:

- Single logon on if you run multiple ACLS to different labs on the same campus
- Authentication control is managed at university level instead of at local ACLS
- Org file system access: researchers can access their home drive through ACLS LDAP (not part of LDAP module)

To establish LDAP, you must run a connection test between ACLS and LDAP service at your organization.

Go to ***System Setting -> Configure System,*** then scroll down to the bottom of the page and click on ***IDAP Setting*** button.

To make LDAP work, you need to seek help from your local IT service to set up the following LDAP parameters:

- Active Directory Domain Name: the domain name for LDAP server, or IP address
- LDAP Enable: check the box to turn on LDAP in ACLS
- LDAP Login Prefix: depends on your local LDAP configuration, for example, some may need a prefix to form the login format as adunsw\z0000000. So your entry is adunsw in this example

Before turning on LDAP in ACLS, please click on “LDAP Connection Test” to confirm LDAP is working.

If LDAP connection is successful, then you can see a return message “SUCCESS”.

You can easily check the LDAP status of each user and staff by clicking on **LDAP User Status**.

To migrate ACLS from non-LDAP to LDAP, you need to pre-configure the user LDAP setting by clicking on **LDAP Pre-Configure.**

In addition, through a keyword check mechanism, you can lock local staff and users to access ACLS through LDAP only. In other words, once you switch on LDAP to those who are local staff and users, their access to ACLS is subject ONLY to the organization ID system check.

For example, at UNSW, local staff and students must use their zID/zPass to access ACLS. zID/zPass is an universal authentication ID system at UNSW.

To make this work, you need to provide the keywords to ACLS through **Configure System**:

Once the system detects this setting, then it locks up any users' access whose email address contains this key text string. For example, in the above example, "unsw" is the keyword to search for lock up and any users who have the email address **xxx@unsw.edu.au** are subject to this lock up. In other words, they must access ACLS through the UNSW ID system.

20 Appendix L – About Microsoft Azure AD Authentication

The Azure Active Directory (Azure AD) enterprise identity service provides single sign-on, multifactor authentication, and conditional access to guard against 99.9 percent of cybersecurity attacks.

20.1 SAML

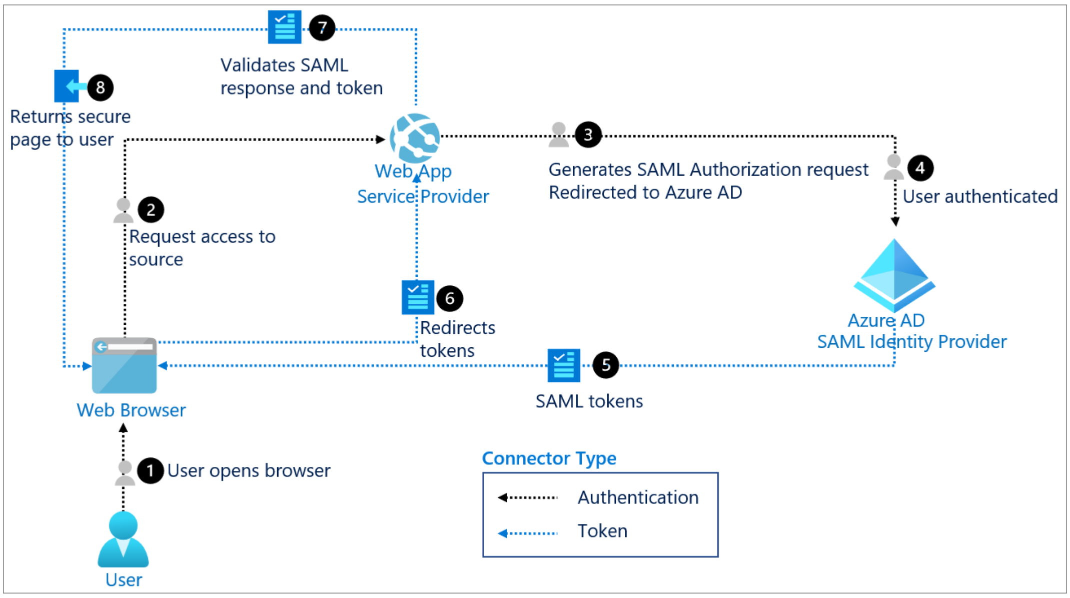
ACLS works with SAML authentication with Azure Active Directory. ecurity Assertion Markup Language (SAML) is an open standard for exchanging authentication and authorization data between an identity provider and a service provider. SAML is an XML-based markup language for security assertions, which are statements that service providers use to make access-control decisions.

The SAML specification defines three roles:

- The principal, generally a user
- The identity provider (IdP)
- The service provider (SP)

There's a need to provide a single sign-on (SSO) experience for an enterprise SAML application.

While one of most important use cases that SAML addresses is SSO, especially by extending SSO across security domains, there are other use cases (called profiles) as well.



20.2 SAML vs LDAP

LDAP and SAML are both authentication protocols and are often used for applications, but the two are leveraged for very different use cases.

20.2.1 The Origins of LDAP and SAML SSO

Before we dive into the similarities and differences between the two authentication protocols, let's first discuss how they've evolved into their current specifications. LDAP (Lightweight Directory Access Protocol) is an open standard that was created in the early 1990s by Tim Howes and his colleagues at the University of Michigan and is still a widely used protocol for authentication into a wide range of applications. That speaks to the flexibility and power of LDAP.

Created in the early 2000s, SAML (Secure Assertion Markup Language) is an assertion-based authentication protocol that federates identities to web applications. While that explanation is an oversimplification, the protocol is effectively integrated with an identity provider (IdP), which asserts that the person is who they say they are.

Next, a service provider (i.e., web application) admits the user to their platform after an XML-based authentication exchange. More technically, an IdP is an authentication authority that produces and relays SAML attribute assertions. This process of using authentication and authorization data was created to happen securely over the internet rather than utilizing the traditional concept of the domain. Significantly, account credentials aren't stored by individual service providers (SPs), which could be subject to data breaches and add administrative overhead when many different credentials exist for users.

20.2.2 Similarities

While the differences are fairly significant, at their core, LDAP and SAML SSO are of the same ilk. They are effectively serving the same function — to help users connect to their IT resources. Because of this, they are often used in cooperation by IT organizations and have become staples of the identity management industry. As web application use has dramatically increased, organizations have leveraged SAML-based web application single sign-on solutions in addition to their core directory service.

20.2.3 Differences

When it comes to their areas of influence, LDAP and SAML SSO are as different as they come. LDAP, of course, is mostly focused toward facilitating on-prem authentication and other server processes. SAML extends user credentials to the cloud and other web applications.

A major difference that is easy to miss between the concepts of SSO and LDAP is that most common LDAP server implementations are driven to be the authoritative identity provider or source of truth for an identity. Most often with SAML implementations, it is not the case that the SAML service is the source of truth, but rather it often acts as a proxy for a directory service, converting that identity and authentication process into a SAML-based flow.

20.2.4 Use Cases

LDAP works well with Linux®-based applications such as OpenVPN™, Kubernetes, Docker, Jenkins, and thousands of others. LDAP servers — such as OpenLDAP™ and 389 Directory — are often used as an identity source of truth, also known as an identity provider (IdP) or directory service within Microsoft Windows (Active Directory) and cloud directories such as JumpCloud that work cross-OS.

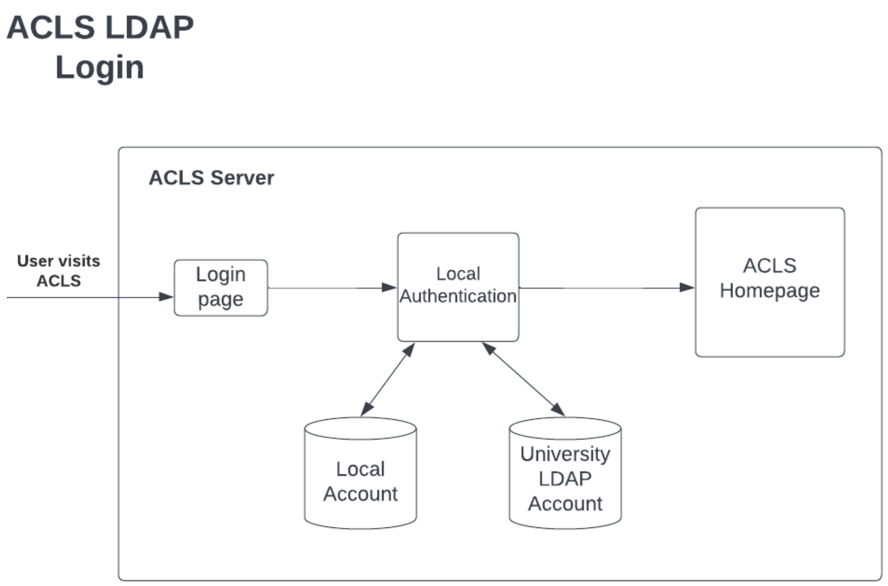
LDAP runs efficiently on systems and gives IT organizations a great deal of control over authentication and authorization. Implementing it, however, is an arduous technical process, creating significant work upfront for IT admins with tasks such as high availability, performance monitoring, security, and more. SAML, on the other hand, is generally used as an authentication protocol used for exchanging authentication and authorization between directories and web applications.

Over the years, SAML has been extended to add functionality to provision user access to web applications as well. SAML-based solutions have historically been paired with a core directory service solution. Vendors used SAML to create software that could extend one user identity from AD to a host of web applications, creating the first generation of Identity-as-a-Service (IDaaS) — single sign-on solutions. Examples of applications that support SAML authentication include Salesforce®, Slack, Trello, GitHub, Atlassian solution, and thousands of others. JumpCloud Single Sign-On provides hundreds of connectors to ensure you can grant access to cloud applications without friction.

20.3 Authentication Methods

20.3.1 LDAP Login

ACLS supports signing in with the LDAP protocol, allowing users to sign in with their university id and password. In addition, it also supports creating local accounts separate to the university account, allowing external staff and contractors to sign in without a university account.



20.3.2 SAML Single Sign On Login

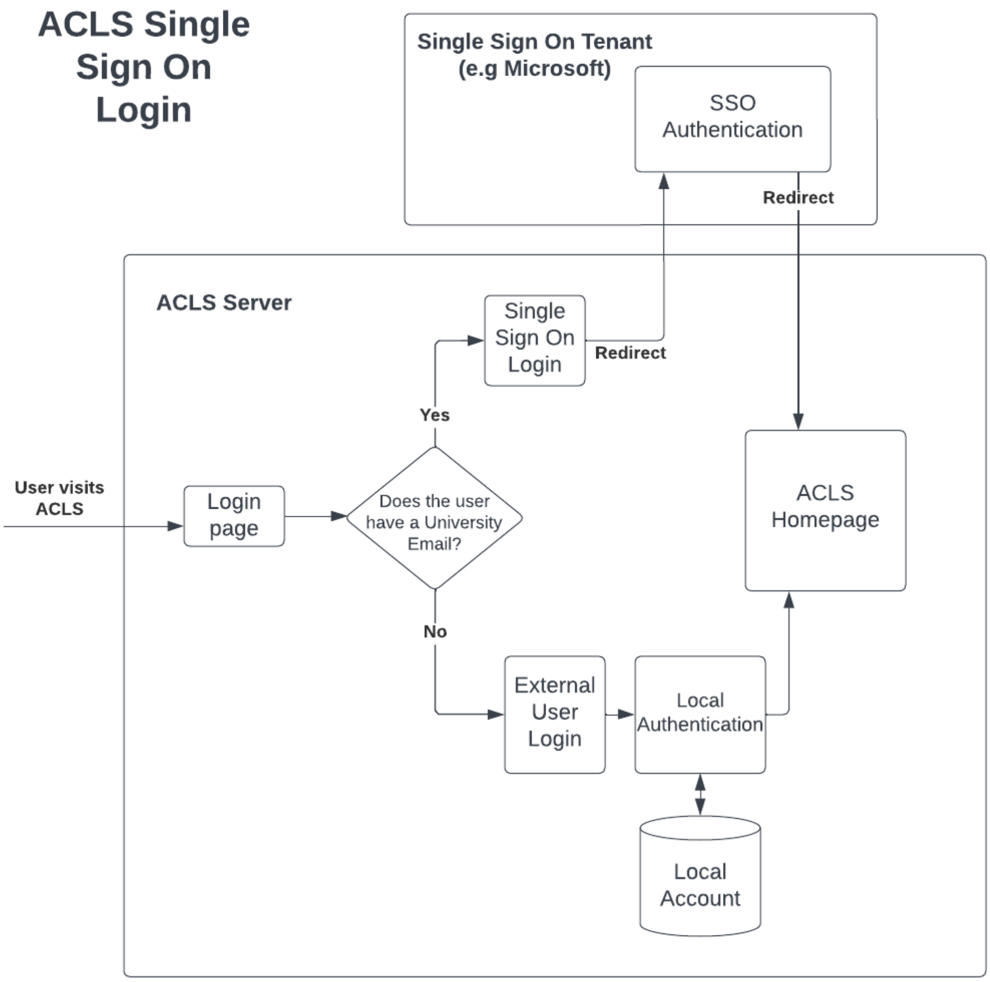
Single Sign On (SSO) is an alternate authentication method for people with a university email account. This authentication method is required by some universities.
ACLS supports Single Sign On with Identity Providers that support the SAML2.0 protocol e.g Microsoft's Azure Active Directory.

Local account creation remains in place to support users that do not hold a university account.

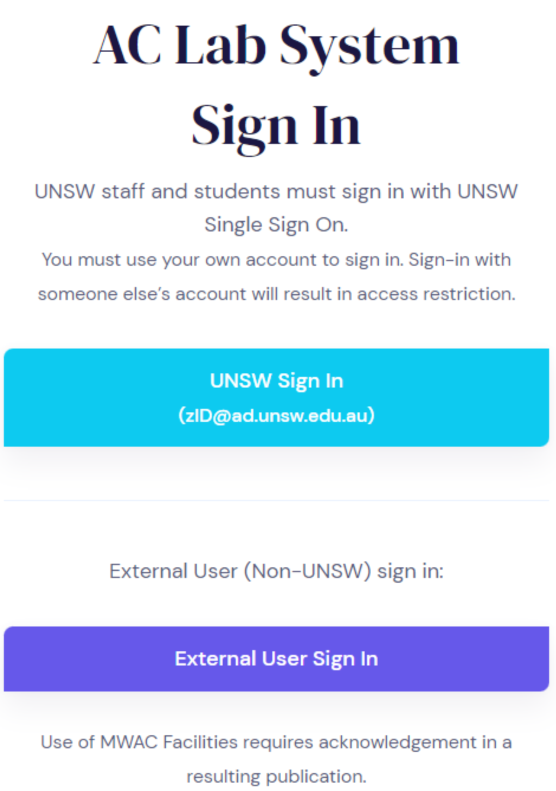
When a user signs in when SSO is enabled, they will be redirected to the account provider's website. After the user has signed in on the external website, the user will be redirected back to ACLS, where they will be logged in with the same account.

Example workflow using Microsoft as the account provider:

- The user visits the ACLS website and presses the sign in button
- The user's web browser redirects to Microsoft's website
- Microsoft prompts the user to sign in with their university Outlook email and password
- The web browser redirects back to ACLS
- The user is now signed in on ACLS

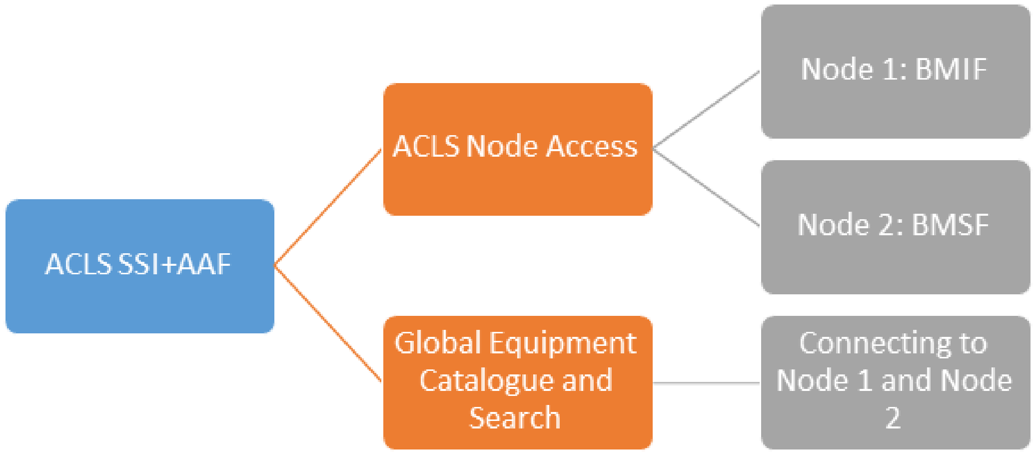


20.3.3 Snapshots of SAML single sign on with ACLS SSI:



21 Appendix M – ACLS Enterprise Deployment

This is ACLS enterprise deployment, SSO aims at achieving a single access point to the trusted ACLS nodes. SSO is useful for multiple ACLS nodes access at university or organization level to replace multiple individual ACLS access. The diagram below demonstrates the concepts of SSO:

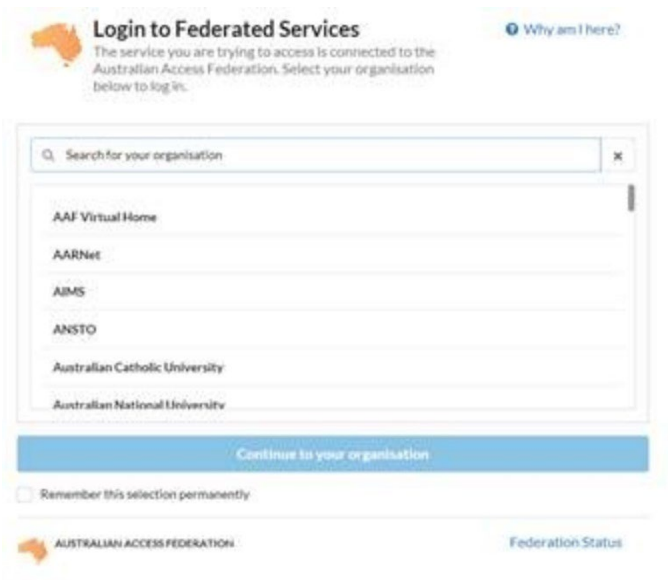


SSI supports the following authentications:

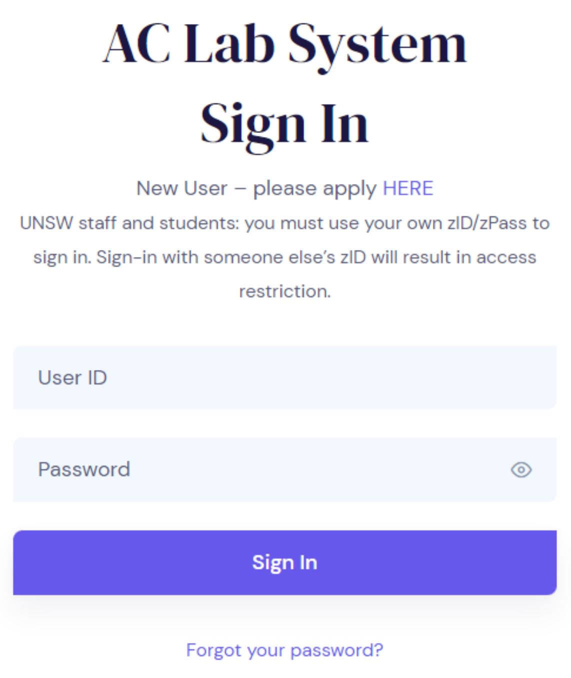
- ACLS local authentication
- LDAP authentication
- AAF authentication
- SAML (Azure AD Authentication)

AAF stands for Australian Access Federation which provides a single access authentication process for all Australian universities and government bodies. The advantage of AAF is that users can access ACLS with its own organization Uni-Key and Uni-Pass if they are registered in ACLS.

The institutes/units/centres/labs which need to provide multiple-universities service can benefit from the AAF integration.



21.1 SSO Working Example



- Katharina Gaus Light Microscopy Facility
- Bioanalytical Mass Spectrometry Facility
- Biological Resources Imaging Laboratory
- Electron Microscope Unit
- Flow Cytometry Core Facility
- Nuclear Magnetic Resonance Facility

21.2 Enable SSO for ACLS Node

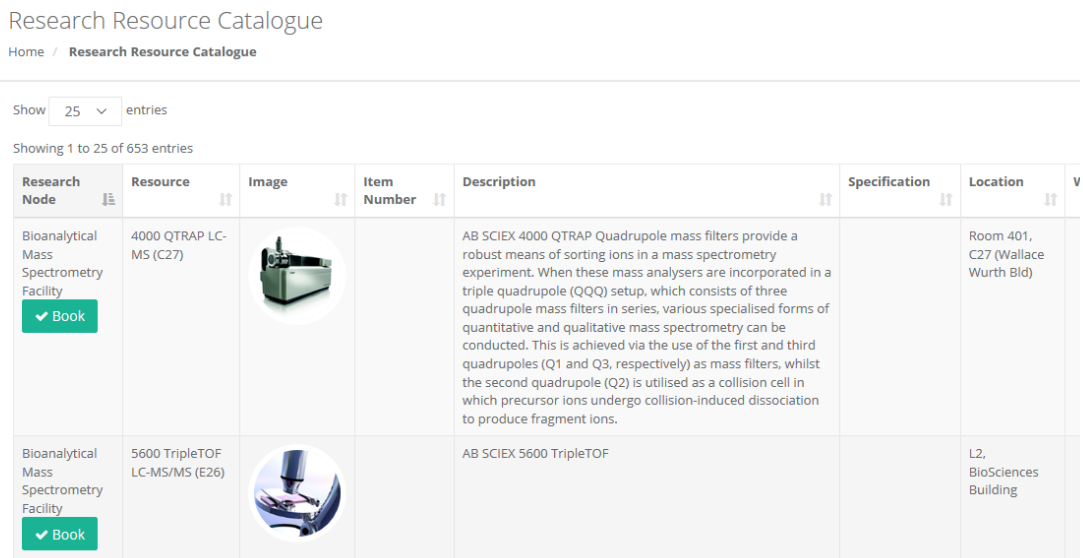
It is easy to configure ACLS node for SSI deployment. Go to Configure System page and set up the following parameters **Access Portal URL**.

Next, you check the box to the parameter **Enable Single Sign In**.

Upon enabling SSI, the ACLS own login page is switched off as users must sign-in via SSI.

21.3 Uni-Wide Catalogue Resources

After SSO deployment, an universal research resource catalogue is available for multiple ACLS nodes to the researchers and students.



Research Resource Catalogue

Home / **Research Resource Catalogue**

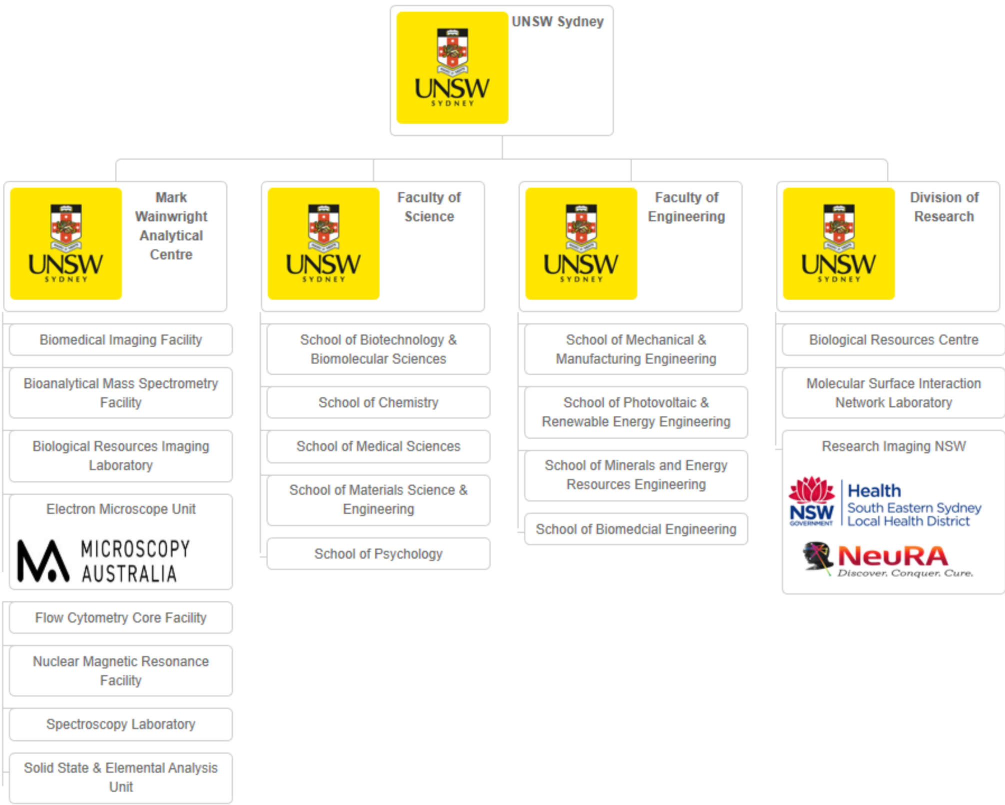
Show 25 entries

Showing 1 to 25 of 653 entries

Research Node	Resource	Image	Item Number	Description	Specification	Location	V
Bioanalytical Mass Spectrometry Facility ✔ Book	4000 QTRAP LC-MS (C27)			AB SCIEX 4000 QTRAP Quadrupole mass filters provide a robust means of sorting ions in a mass spectrometry experiment. When these mass analysers are incorporated in a triple quadrupole (QQQ) setup, which consists of three quadrupole mass filters in series, various specialised forms of quantitative and qualitative mass spectrometry can be conducted. This is achieved via the use of the first and third quadrupoles (Q1 and Q3, respectively) as mass filters, whilst the second quadrupole (Q2) is utilised as a collision cell in which precursor ions undergo collision-induced dissociation to produce fragment ions.		Room 401, C27 (Wallace Wurth Bld)	
Bioanalytical Mass Spectrometry Facility ✔ Book	5600 TripleTOF LC-MS/MS (E26)			AB SCIEX 5600 TripleTOF		L2, BioSciences Building	

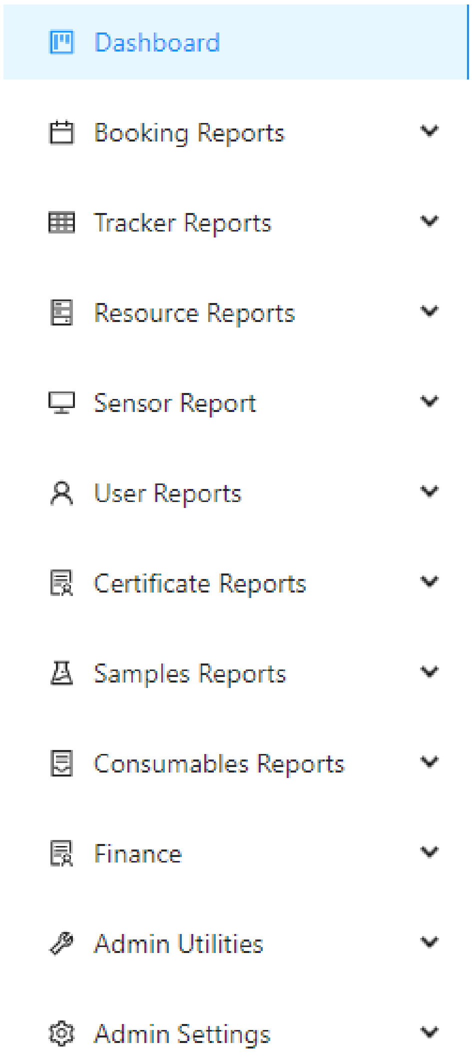
21.4 Uni-wide Organisation Charts

Organisation charts are available in SSO as snapshots here.



21.5 Node BI (Business Intelligence)

Enterprise service provides the centralised business intelligence (BI) to cover centralised reporting, invoicing, and finance system integration services. Currently, it is deployed at UNSW only, and could open to the other institutes subject to the further discussion and arrangement.



BI offers a unique dashboard to provide the overview of each ACLS nodes being connected to the BI.

ACLS Business Intelligence Dashboard

BEES

Active Resources	Bookable Resources	Active Users	Active Accounts	Active Projects
201	183	470	54	0
Active Training Certificates	Issued Certificates	Bookings	Consumables	Consumable Orders
3	991	2,261	0	0
Sample jobs	Publications	Approved Inductions	WHS Declarations	
0	0	0	0	

Last Updated: 01/08/2023

BMSF

Active Resources	Bookable Resources	Active Users	Active Accounts	Active Projects
43	43	202	268	444
Active Training Certificates	Issued Certificates	Bookings	Consumables	Consumable Orders
141	1,817	21,711	0	0
Sample jobs	Publications	Approved Inductions	WHS Declarations	
1,459	0	0	100	

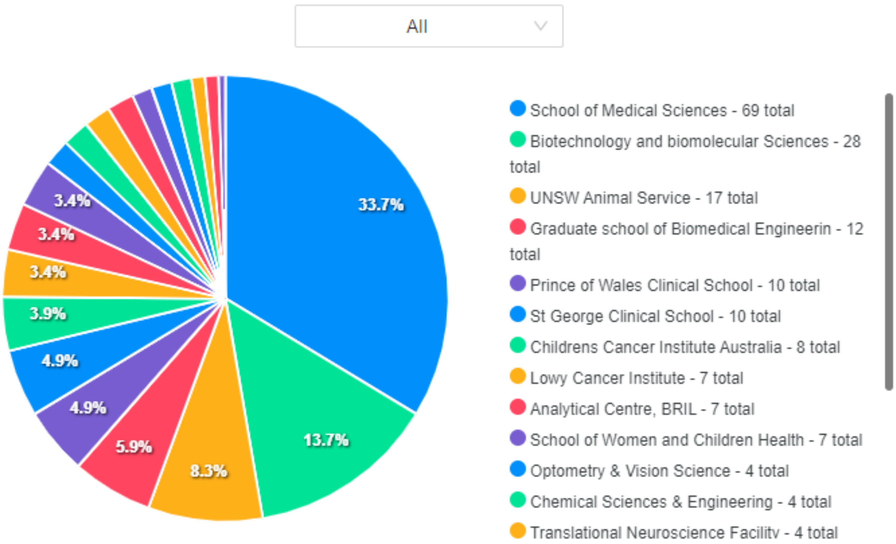
Last Updated: 01/08/2023

Graphic presentation is available at BI, a screen print is attached here for example.

Animal Service Active Users

Total: 205

Divided into School/Organisation



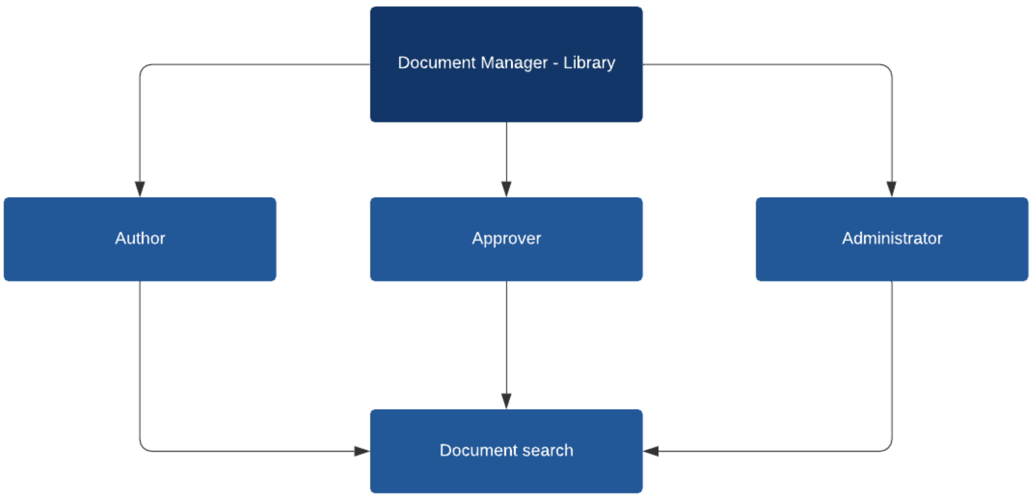
22 Appendix N – WHS Document Declaration Manager

WHS document service and declaration service comes with a easy and friendly user interface to create folders, upload draft, approve drafts with two level controls, maintain user declaration records, and tracker document revision, and more.

The benefits to deploy WHS document service:

- Establish electronic WHS document library
- Tracker document change revision
- Multi-level WHS document approval process
- Auto-track the WHS document declaration by researchers

Here are the flow charts for the process.

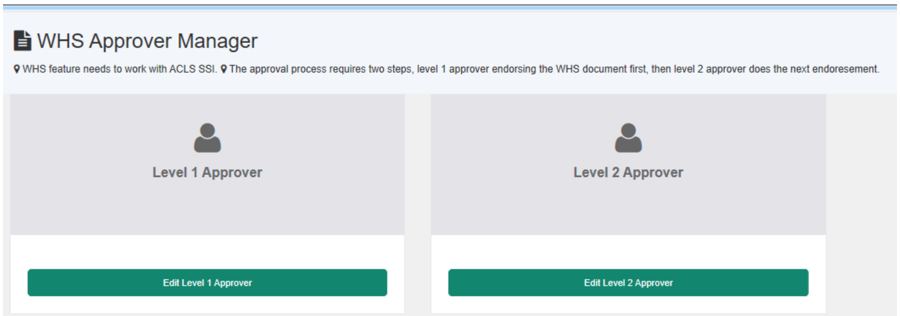


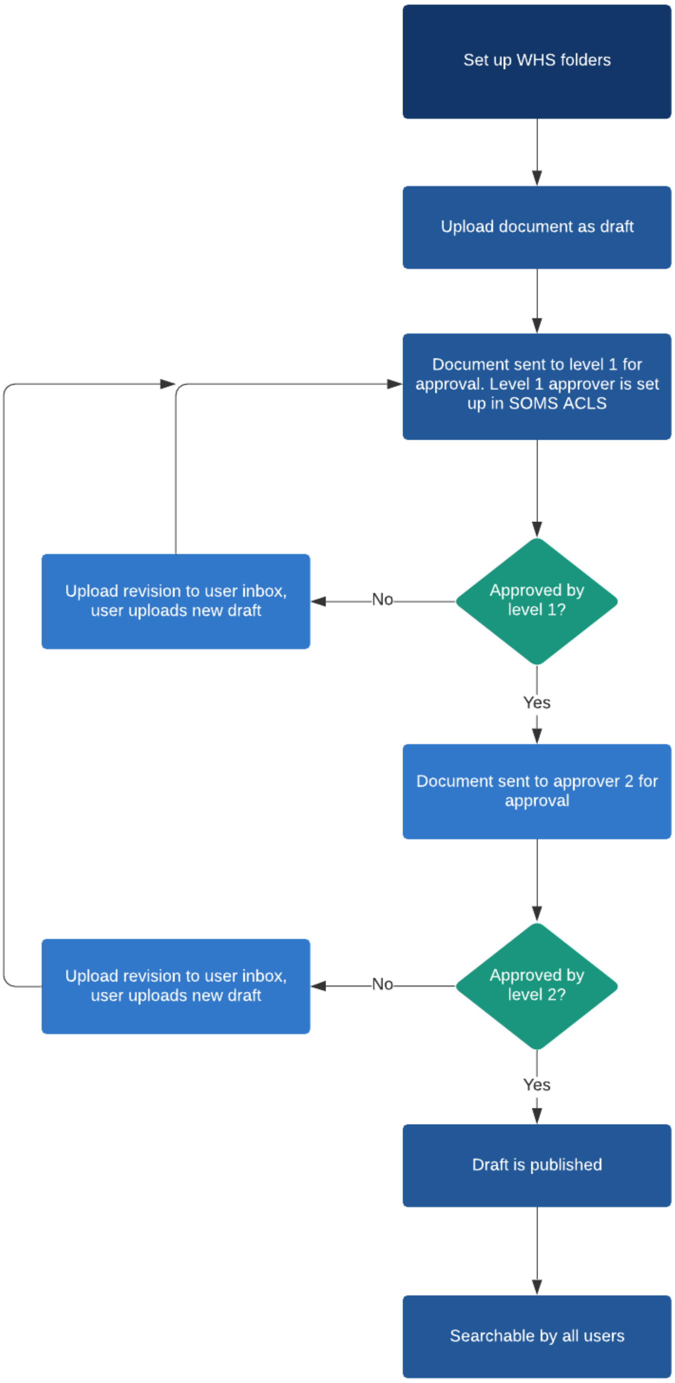
Author = Able to search library, create drafts, review existing documents and edit.

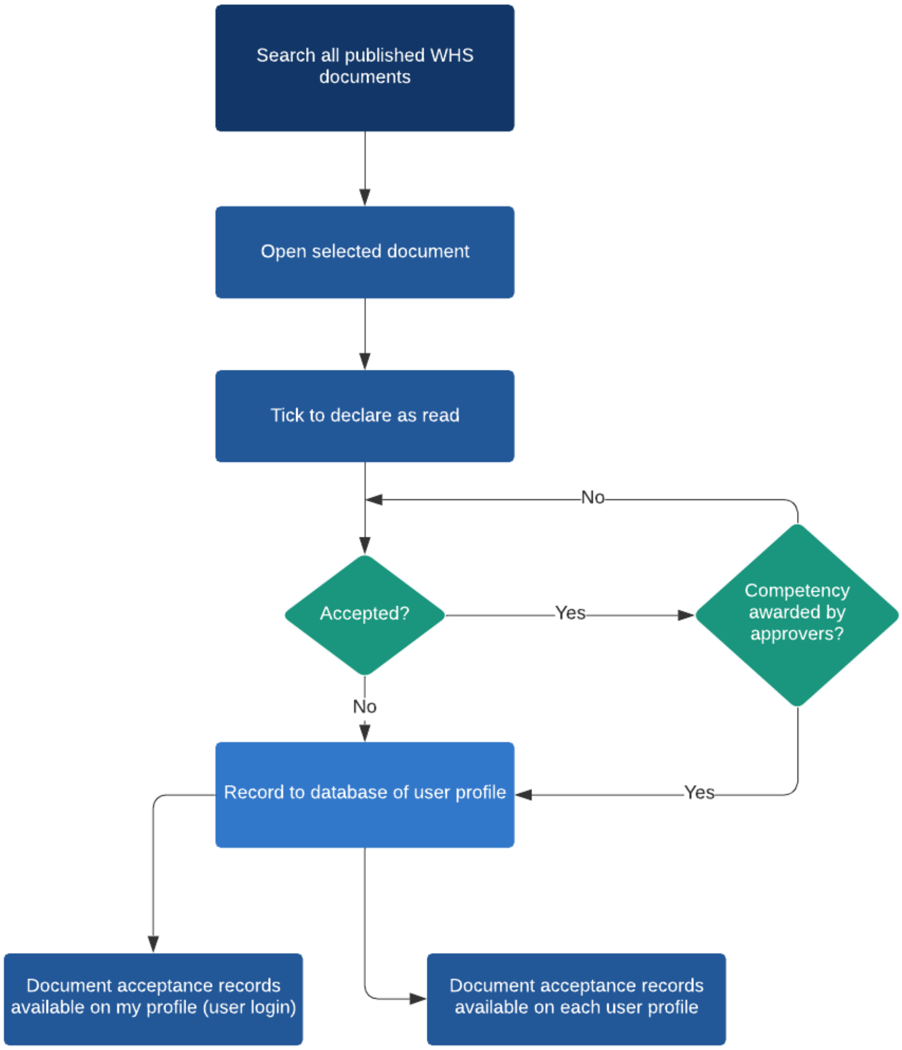
Approver = access of an author + be able to approve documents for publishing in the library.

Administrator = access of an author + approver + be able to create authors and send documents to authors for review.

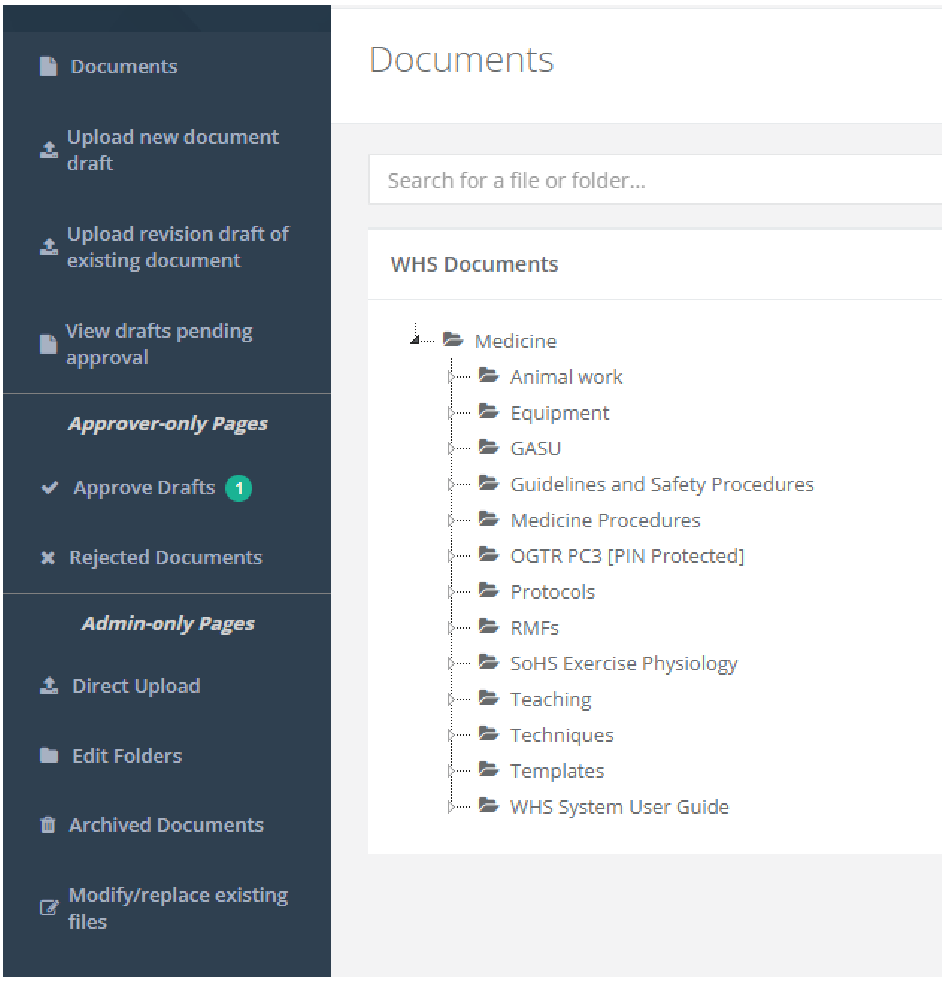
Author, level 1 approver and level 2 approver, and administrator is configured in ACLS


WHS Approver Manager
WHS feature needs to work with ACLS SSI. The approval process requires two steps, level 1 approver endorsing the WHS document first, then level 2 approver does the next endorsement.
Level 1 Approver
Edit Level 1 Approver
Level 2 Approver
Edit Level 2 Approver


Set up WHS folders
Upload document as draft
Document sent to level 1 for approval. Level 1 approver is set up in SOMS ACLS
Approved by level 1?
No
Upload revision to user inbox, user uploads new draft
Yes
Document sent to approver 2 for approval
Approved by level 2?
No
Upload revision to user inbox, user uploads new draft
Yes
Draft is published
Searchable by all users



Snapshots: documents, view, and upload, approve, edit folders, and rejected doc



The user guide and admin guide of WHS document service are provided upon request.