

Core Managers: Managing Equipment Reservations & Calendars

Questions? Contact VUMCcores@vumc.org

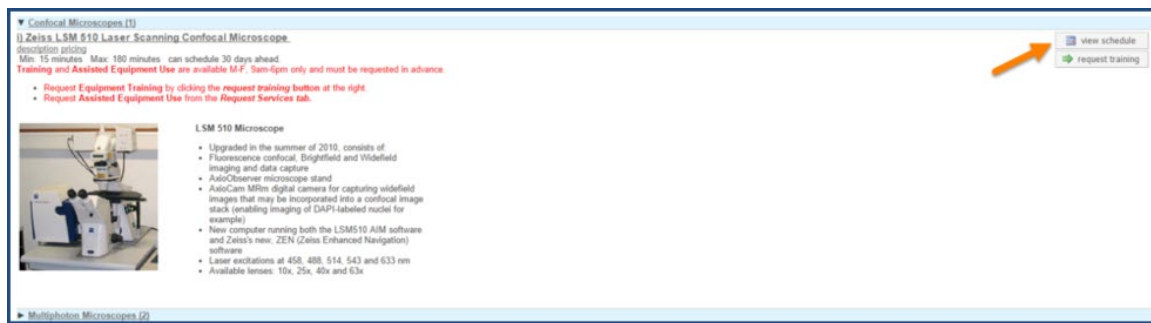
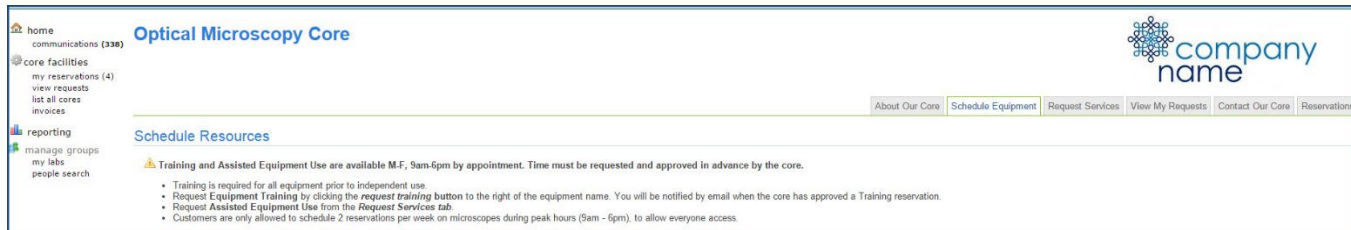
Resource Calendars

Cores utilizing the iLab Calendar Workflow functionality should reference this guide on full system behavior and procedures.

Resource Calendars – Scheduling Equipment

Core customers can reserve time on resource calendars directly on the core’s iLab site by viewing the **Scheduled Equipment Tab**.

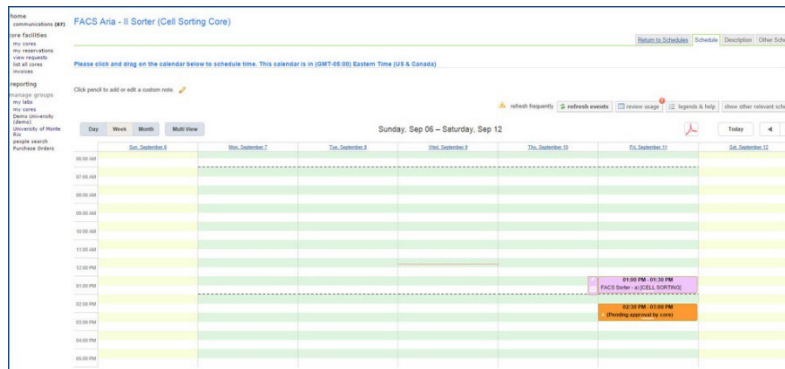
- Once the **Schedule Equipment** page, there will be a list of available resources (instruments or rooms) for customers to reserve.
- Customers can initiate a reservation request by clicking the **View Schedule** button and then selecting the reservation time frame on the calendar.



Reading the calendar:

The calendar will display events in various colors for easier reading. Events are color-coded on the calendar to quickly determine the status of the appointment. The color legend for events is as follows.

- **Green Events:** Your future reservations
- **Yellow Events:** Your past reservations
- **Red Events:** If the equipment is unavailable for selected amount of time
- **Orange Events:** In some cases, cores require core approval for reservations. If you have reserved time on the calendar that requires core approval, that event will be in orange. When the reservation has been approved you may receive an email and you will see the event turn to purple.
- **Purple Events:** When a reservation is approved by the core it will turn purple.



Confirm Equipment Usage

- The core is **required** to confirm all equipment usage prior to creating the monthly billing event. If usage is not confirmed, the resource usage charges will not be processed.
- It is recommended to confirm the usage on each calendar at least weekly or daily depending on the number of reservations typically processed by the core.

To review usage:

1. Select the **Schedule Equipment** tab, an alert icon will display on resources with reservations pending confirmation.
2. Click on the **Confirm Usage** button at the top of the page to confirm the pending usage for all instruments at one time.
3. The **Confirm Usage** page will open.
4. Use the **filter panel** on the right-hand side to filter to view a specific instrument(s).
5. Review the usage.

The screenshot displays the Vanderbilt Digital Histology Shared Resource (DHSR) interface. At the top, there is a header with the title "Vanderbilt Digital Histology Shared Resource (DHSR)" and a "Back to core" button. Below the header, there are tabs for "Dates", "Issues", "Warnings", "Owner name", and "Source". A "Start date" button is also visible. The main content is a table with columns: Owner, Resource, Start date, Duration, Usage type, Cost, Source, Status, and Confirm. The table lists six reservations, all with a status of "Scheduled" and a "Confirm" button. On the right side, there is a "Select resources" panel with a search input, a "Show all resources" dropdown, and three checkboxes: "Consultation/ Classifier Training", "DeltaVision", and "Gel/Count Scanning". An "Apply" button is at the bottom of the panel. A callout box labeled "Filter Panel." points to this panel. At the bottom of the table, it says "Displaying 6 reservations out of 6 total" and "Load more".

Owner	Resource	Start date	Duration	Usage type	Cost	Source	Status	Confirm
Stephen Colbert	Consultation/ Classifier Training (Consultation/ Classifier Training)	29 Apr 09:45 AM	1.75 hrs	Consultations \$0.00/hr (needs approval)	\$0.00	Scheduled	Valid	Confirm
Stephen Colbert	Gel/Count Scanning (Gel/Count)	29 Apr 01:00 PM	1.00 hrs	Independent Use \$12.00/hr (trained users)	\$12.00	Scheduled	Valid	Confirm
Stephen Colbert	Consultation/ Classifier Training (Consultation/ Classifier Training)	30 Apr 09:30 AM	1.00 hrs	Consultations \$0.00/hr (needs approval)	\$0.00	Scheduled	Valid	Confirm
Stephen Colbert	DeltaVision (DeltaVision)	30 Apr 01:45 PM	1.00 hrs	Imaging - Fixed \$34.80/hr (trained users)	\$34.80	Scheduled	Valid	Confirm
Stephen Colbert	Gel/Count Scanning (Gel/Count)	30 Apr 02:30 PM	1.00 hrs	Training \$80.64/hr	\$80.64	Scheduled	Valid	Confirm
Stephen Colbert	DeltaVision (DeltaVision)	01 May 01:30 PM	1.00 hrs	Imaging - Fixed \$34.80/hr (trained users)	\$34.80	Scheduled	Valid	Confirm

To update payment information, usage times or usage type for specific events:

Changes to a specific event can be made prior to confirm the event.

- Click the **options** icon beside the **Green Confirm** box on the event line. An **options menu** will be displayed.

Vanderbilt Digital Histology Shared Resource (DHSR)

Owner	Resource	Start date	Duration	Usage type	Cost	Source	Status	Confirm	Options
Stephen Colbert	Consultation/ Classifier Training (Consultation/ Classifier Training)	29 Apr 09:45 AM	1.75 hrs	Consultations \$0.00/hr (needs approval)	\$0.00	Scheduled	Valid	Confirm	Options
Stephen Colbert	GelCount Scanning (GelCount)	29 Apr 01:00 PM	1.00 hrs	Independent Use \$12.00/hr (trained users)	\$12.00	Scheduled	Valid	Confirm	Options
Stephen Colbert	Consultation/ Classifier Training (Consultation/ Classifier Training)	30 Apr 09:30 AM	1.00 hrs	Consultations \$0.00/hr (needs approval)	\$0.00	Scheduled	Valid	Confirm	Options
Stephen Colbert	DeltaVision (DeltaVision)	30 Apr 01:45 PM	1.00 hrs	Imaging - Fixed \$34.80/hr (trained users)	\$34.80	Scheduled	Valid	Confirm	Options
Stephen Colbert	GelCount Scanning (GelCount)	30 Apr 02:30 PM	1.00 hrs	Training \$80.64/hr	\$92.64	Scheduled	Valid	Confirm	Options
Stephen Colbert	DeltaVision (DeltaVision)	01 May 01:30 PM	1.00 hrs	Imaging - Fixed \$34.80/hr (trained users)	\$34.80	Scheduled	Valid	Confirm	Options

Displaying 6 reservations out of 6 total

Load more

Select resources

Type a resource or category name

Show all resources

Consultation/ Classifier Training

Click to display option menu.

Options Menu:

Valid Confirm

- adjust owner/group/project
- adjust times
- usage type
- add-on charges
- total cost
- payment info
- charge name

Click **usage type** to update the event usage type (i.e., assisted use or independent-use)

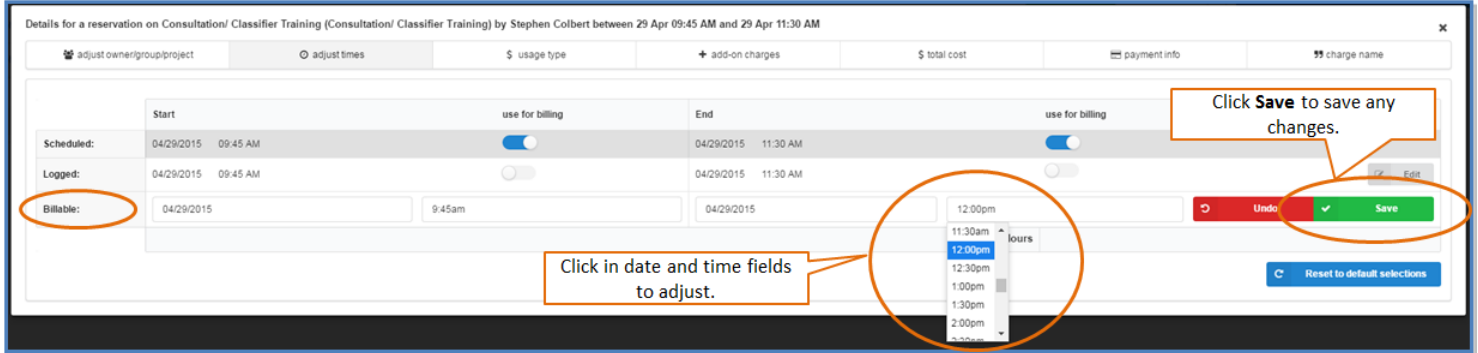
Click **adjust times** to update the date and time of the event.

Click **add-on charges** to add on additional service item charges to the event..

Click **payment info** to update the billing number.

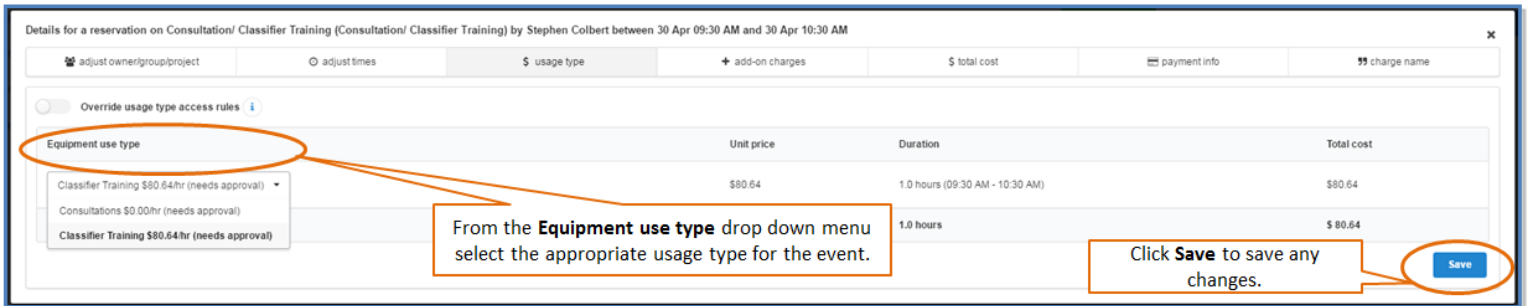
To **change the billable time** of an event: Options Menu >> **Adjust Times**

1. An adjustment window will open.
2. Click **Edit** on the **Billable** line.
3. Click in the **date** and **time** fields to adjust. A drop-down menu will display.
4. Click **Save** to save the changes. The page will refresh, and the new time/date will display.
5. Close the window after you have saved the changes.



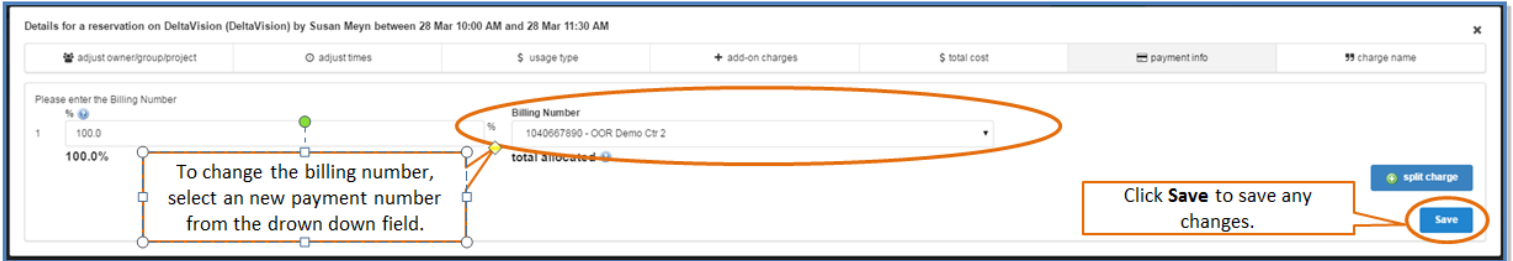
To **change the usage type** for an even: Options Menu >> **usage type**

1. An adjustment window will open.
2. Select the applicable usage type in the drop-down **Equipment use type** field.
3. Click **Save** to save the changes. The page will refresh.
4. Close the window after you have saved the changes.



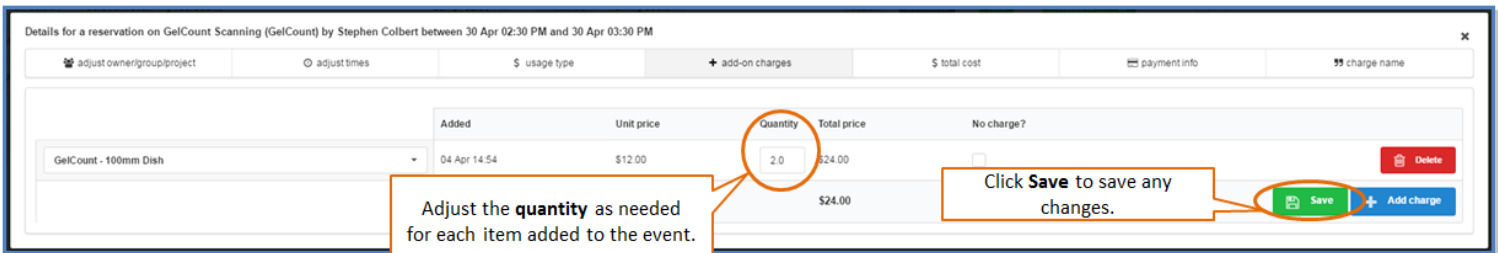
To **change the payment information** for an event: Options Menu >> **payment information**

1. An adjustment window will open.
2. Select the new billing number in the drop-down **billing number** field.
3. Charges can be **Split** between multiple billing numbers by clicking **split charge**.
4. Click **Save** to save the changes. The page will refresh, and the new payment information will display.
5. Close the **window** after you have saved the changes.



To bill **additional service items** associated with the event: Options Menu >> **add-on charges**

1. A new window will open.
2. Click **Add charge** to add on additional service items.
3. The **Select Services** box will display. Select the item from the drop-down price list that you wish to add.
4. Adjust the **Quantity** field
5. Click **Save** to save the changes. The page will refresh.
6. Close the **window** after you have saved the changes.



To confirm usage:

After the usage has been reviewed all necessary adjustments made, the events will need to be confirmed.

1. Click the **check all box** at the top of the page to select all events ready for confirmation.
2. If needed, uncheck the line item to hold the confirmation of a specific reservation/event.
3. Then click the **Blue Confirm** button.
4. This will confirm all selected reservations at once.

The screenshot shows the 'Vanderbilt Digital Histology Shared Resource (DHSR)' interface. A table lists reservations with columns for Owner, Resource, Start date, Duration, Usage type, Cost, Source, Status, and a 'Confirm' button. A callout box points to the 'Confirm' button with the text: 'Check box and click Confirm to confirm all usage.' The 'Confirm' button is highlighted in blue. On the right side, there is a 'Select resources' panel with a search bar and a list of resources: Consultation/ Classifier Training, DeltaVision, and Gei/Count Scanning. An 'Apply' button is at the bottom of this panel. A 'Back to core' button is at the top right of the interface.

Owner	Resource	Start date	Duration	Usage type	Cost	Source	Status	Confirm
Stephen Colbert	Consultation/ Classifier Training (Consultation/ Classifier Training)	29 Apr 09:45 AM	1.75 hrs	Consultations \$0.00/hr (needs approval)	\$0.00	Scheduled	Valid	Confirm
Stephen Colbert	Gei/Count Scanning (Gei/Count)	29 Apr 01:00 PM	1.00 hrs	Independent Use \$12.00/hr	\$12.00	Scheduled	Valid	Confirm
Stephen Colbert	Consultation/ Classifier Training (Consultation/ Classifier Training)	30 Apr 09:30 AM	1.00 hrs	Consultations \$0.00/hr (needs approval)	\$0.00	Scheduled	Valid	Confirm
Stephen Colbert	DeltaVision (DeltaVision)	30 Apr 01:45 PM	1.00 hrs	Imaging - Fixed \$34.80/hr (trained users)	\$34.80	Scheduled	Valid	Confirm
Stephen Colbert	Gei/Count Scanning (Gei/Count)	30 Apr 02:30 PM	1.00 hrs	Training \$80.64/hr	\$80.64	Scheduled	Valid	Confirm
Stephen Colbert	DeltaVision (DeltaVision)	01 May 01:30 PM	1.00 hrs	Imaging - Fixed \$34.80/hr (trained users)	\$34.80	Scheduled	Valid	Confirm

5. Click **Back to Core** on the left-hand side of the page to exit the usage confirmation module.

The screenshot shows the 'Vanderbilt Digital Histology Shared Resource (DHSR)' interface. A table lists reservations with columns for Owner, Resource, Start date, Duration, Usage type, Cost, Source, Status, and a 'Confirm' button. A callout box points to the 'Back to core' button with the text: 'Click Back to core to exist the usage confirmation module.' The 'Back to core' button is highlighted in blue. On the right side, there is a 'Select resources' panel with a search bar and a list of resources: Consultation/ Classifier Training, DeltaVision, and Gei/Count Scanning. An 'Apply' button is at the bottom of this panel. A 'Back to core' button is at the top right of the interface.

Owner	Resource	Start date	Duration	Usage type	Cost	Source	Status	Confirm
Stephen Colbert	Gei/Count Scanning (Gei/Count)	29 Apr 01:00 PM	1.00 hrs	Independent Use \$12.00/hr (trained users)	\$12.00	Scheduled	Valid	Confirm
Stephen Colbert	Consultation/ Classifier Training (Consultation/ Classifier Training)	30 Apr 09:30 AM	1.00 hrs	Classifier Training \$80.64/hr (needs approval)	\$80.64	Scheduled	Valid	Confirm
Stephen Colbert	DeltaVision (DeltaVision)	30 Apr 01:45 PM	1.00 hrs	Imaging - Fixed \$34.80/hr (trained users)	\$34.80	Scheduled	Valid	Confirm
Stephen Colbert	Gei/Count Scanning (Gei/Count)	30 Apr 02:30 PM	1.00 hrs	Training \$80.64/hr	\$116.64	Scheduled	Valid	Confirm
Stephen Colbert	DeltaVision (DeltaVision)	01 May 01:30 PM	1.00 hrs	Imaging - Fixed \$34.80/hr (trained users)	\$34.80	Scheduled	Valid	Confirm
Susan Meyn	DeltaVision (DeltaVision)	28 Mar 10:00 AM	1.00 hrs	Imaging - Live \$30.00/hr (trained users)	\$30.00	Scheduled	Valid	Confirm

Managing Equipment Usage

Calendar settings are highly customizable depending on the needs of the core. Contact your Core AO for more details and changing your calendar settings.

Options include:

- Requiring core approval of customer reservations.
- Allowing only trained users to reserve time.
- Setting different availability times for trained v. untrained users.
- Setting different rates for trained v. untrained users.

Approving pending reservations:

In some cases, cores require core approval for reservations. Please complete the following steps to approve pending reservations if the core's instrument is set up to require approvals.

1. If the customer has reserved time on a calendar that requires core approval, that event will display in **orange**.
2. Click the **details icon** on the pending reservation to view the reservation details.
3. Review the details and click **Save & Approve**.
4. When the reservation has been approved, the event will display in **purple**.

The screenshot displays a web-based calendar for the 'FACS Aria - II Sorter (Cell Sorting Core)'. The calendar view is set to 'Day' and shows the week from Sunday, September 6 to Saturday, September 12. The time slots range from 06:00 AM to 05:00 PM. A reservation is visible on Friday, September 11, from 01:30 PM to 01:30 PM, titled 'FACS Sorter - a) [CELL SORTING]'. Below this reservation, there is an orange box indicating '(Pending approval by core)'. A callout box points to the reservation with the text 'Click the details icon here to review pending reservation.' The interface includes a sidebar with navigation options like 'home', 'communications', 'my reservations', and 'reporting'. The top right has buttons for 'Return to Schedules', 'Schedule', 'Description', and 'Other Schedules'. The bottom right has a 'Today' button and navigation arrows.

Calendars with trained users

In some cases, cores only allow trained users to schedule time on specific instruments.

- If the user has access to the calendar, the user will be able to select view schedule and make a reservation.
- If the user does not have access, the user will need to select “Request Training” to request approval from the core to use the instrument.
 - NOTE: “request training” tool is an optional feature.

The screenshot shows the iLab Solutions interface for Vanderbilt University Medical Center. The page title is "Vanderbilt Technologies for Advanced Genomics (VANTAGE)". The navigation menu includes "home", "communications (21)", "core facilities", "my reservations", "view requests", "list all cores", "invoices", "reporting", "manage groups", "my labs", and "people search". The "Schedule Resources" section contains a warning: "Reservations must be cancelled 1 hour prior to the reserved time or users will be charged for the reservation." Below this, it states: "Reservations may be made on both the Quant Studio and the 7900HT 24 hours a day and 7 days a week. Samples **MUST** be dropped off during normal business hours. No access to the core is granted outside of normal business hours." A link for "7900HT description pricing" is visible. In the bottom right corner, two buttons are circled in red: "view schedule" and "request training".

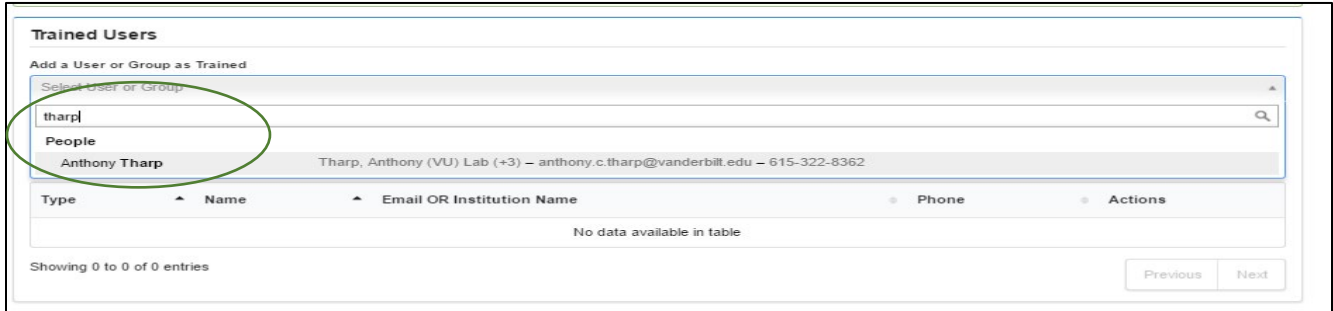
To grant approval for a trained user:

Option 1: Add trained users per instrument.

1. Navigate to the **Schedule Equipment** Tab.
2. Click the **blue pencil** next to the instrument to open the instrument settings.
3. In the **Trained Users** section, locate the **Add a User or Group as Trained** field.

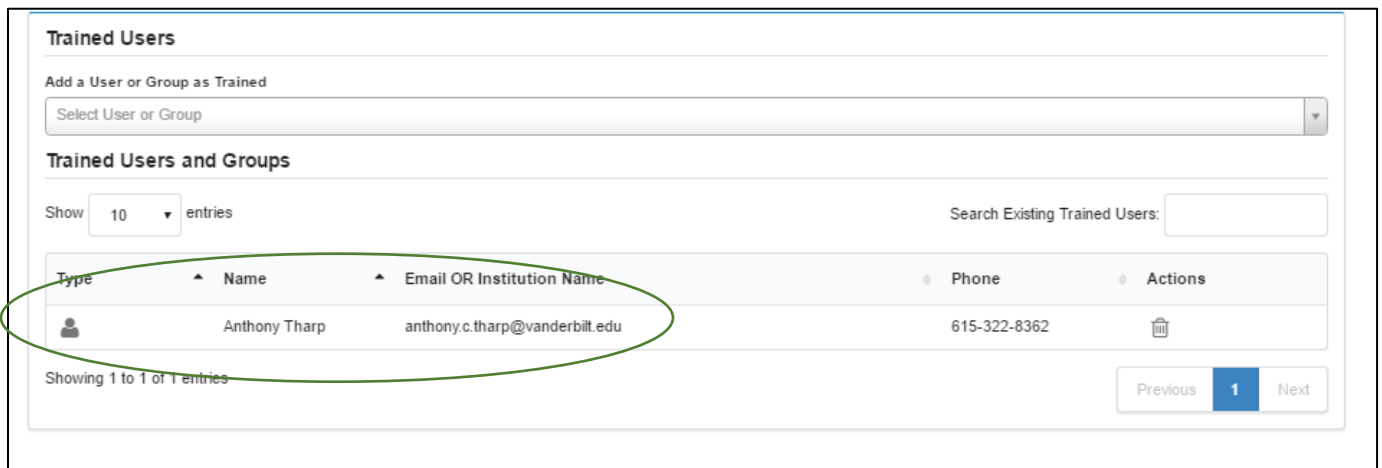
The screenshot shows the "Settings for '7.0T MRI'" page. The left-hand menu is open, and the "Training" option is highlighted with a green oval. The main content area shows the "Trained Users" section, which is also highlighted with a green oval. This section includes a "Welcome to the new scheduler settings interface!" message, a "Trained Users" section with an "Add a User or Group as Trained" field and a "Select User or Group" dropdown, and a "Trained Users and Groups" section with a "Show 10 entries" dropdown and a "Search Existing Trained Users:" input field. Below this is a table with columns for "Type", "Name", "Email OR Institution Name", "Phone", and "Actions". The table is currently empty, showing "No data available in table".

4. Search for the new user by entering the name of the user in the **drop-down field**. As you start typing, usernames will display. | Select the user's name.



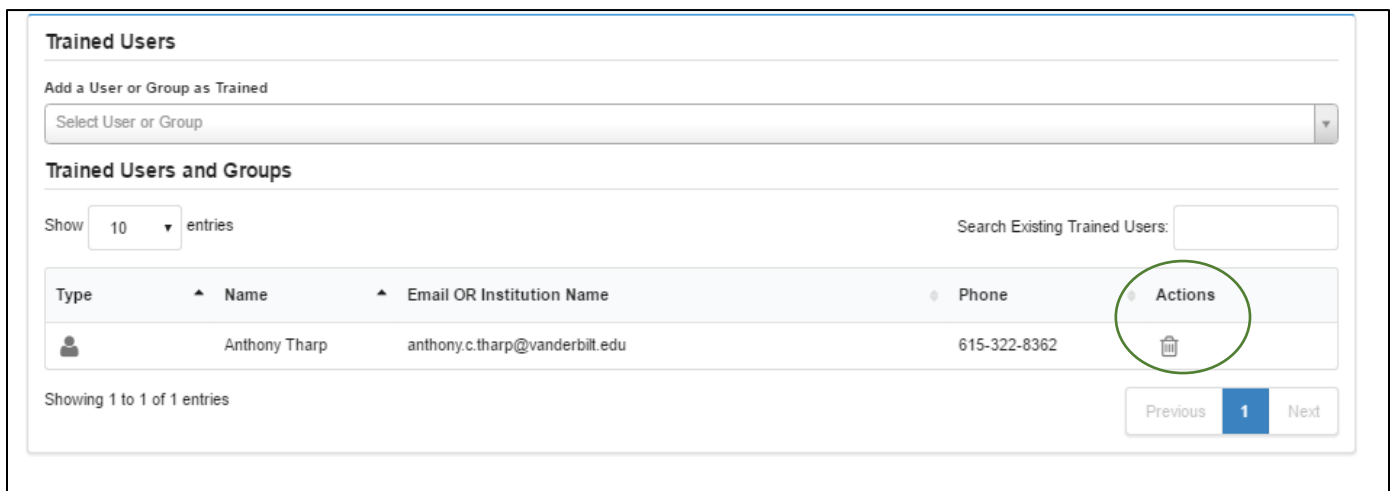
The screenshot shows the 'Trained Users' interface. At the top, there is a section titled 'Add a User or Group as Trained' with a search input field labeled 'Select User or Group'. The search field contains the text 'tharp|'. Below the search field, a dropdown menu is open, showing a list of results under the heading 'People'. The first result is 'Anthony Tharp' with the email 'Tharp, Anthony (VU) Lab (+3) - anthony.c.tharp@vanderbilt.edu - 615-322-8362'. Below the dropdown, there is a table with columns: Type, Name, Email OR Institution Name, Phone, and Actions. The table is currently empty, with the text 'No data available in table' displayed. At the bottom, it says 'Showing 0 to 0 of 0 entries' and has 'Previous' and 'Next' buttons.

5. After the name selected, the user will be listed in the **“Trained Users and Groups”** list.



The screenshot shows the 'Trained Users' interface. The search dropdown is now closed. Below it, there is a section titled 'Trained Users and Groups'. It has a 'Show 10 entries' dropdown and a 'Search Existing Trained Users:' input field. Below this, there is a table with columns: Type, Name, Email OR Institution Name, Phone, and Actions. The table contains one entry for 'Anthony Tharp' with the email 'anthony.c.tharp@vanderbilt.edu' and phone number '615-322-8362'. The 'Actions' column for this entry contains a trash can icon. At the bottom, it says 'Showing 1 to 1 of 1 entries' and has 'Previous', '1', and 'Next' buttons.

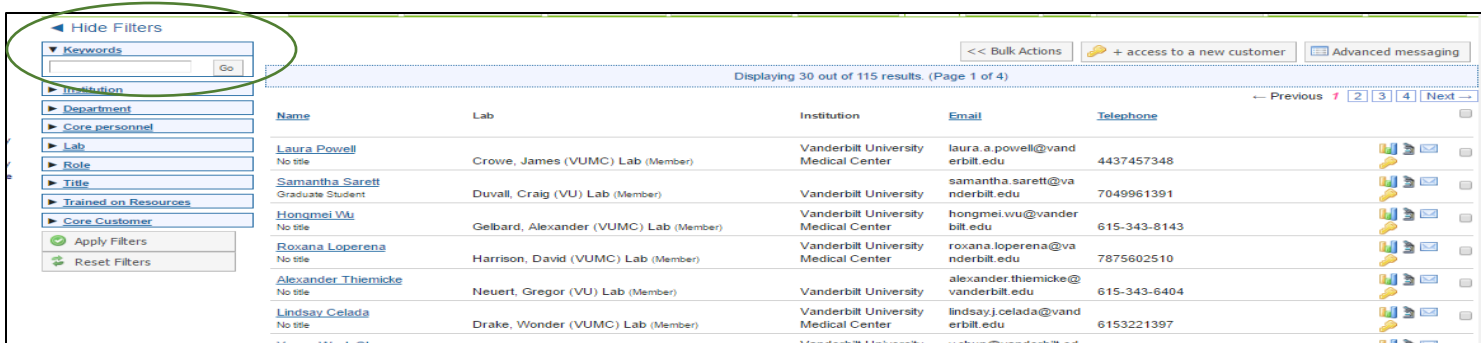
6. To remove trained user access, click the **trashcan** icon next to the user's name.



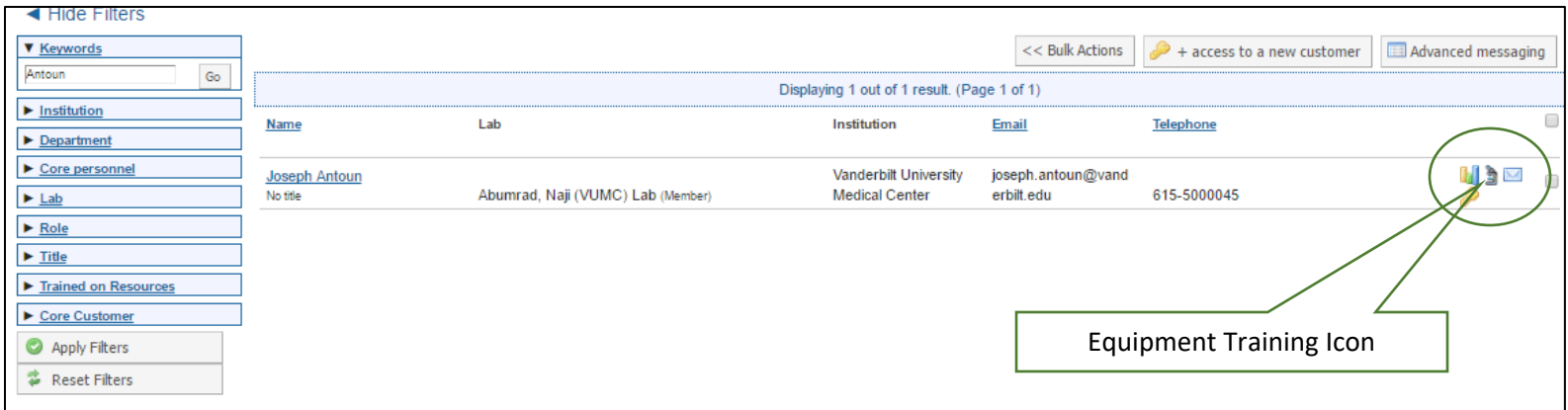
The screenshot shows the 'Trained Users' interface, identical to the previous one. The trash can icon in the 'Actions' column for the user 'Anthony Tharp' is circled in green, indicating it should be clicked to remove the user's access.

Option 2: Grant access to multiple instruments per user using the People Tab.

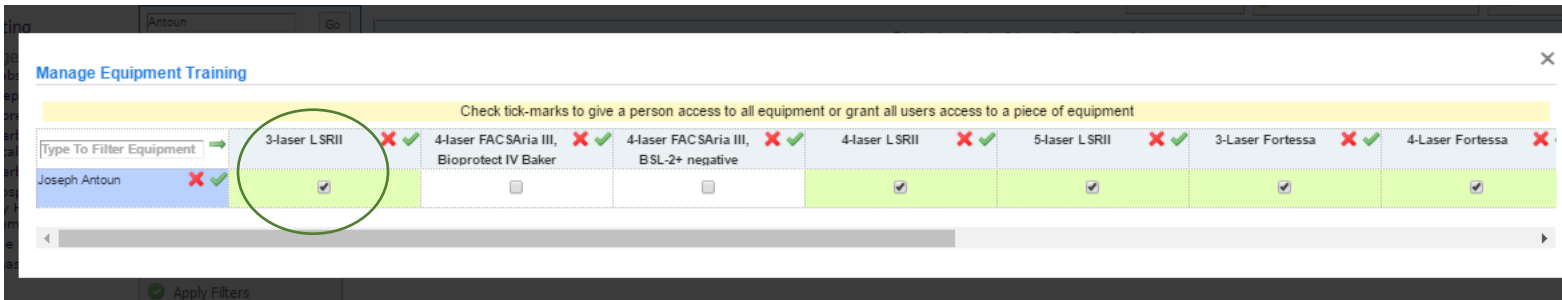
1. Navigate to the **People** Tab.
2. Search for the user by entering their name in the **Keyword** box in the **left-hand filter panel**. Click **“Go”** to search for the user.



3. Click the **Equipment Training** icon next to the user’s name.



4. The **Manage Equipment Training** window will display. **Check the box** under each instrument.
 - a. The **box will turn green** to indicate the user is now added as a trained user.
 - b. Click the **Grey X** to close the window.

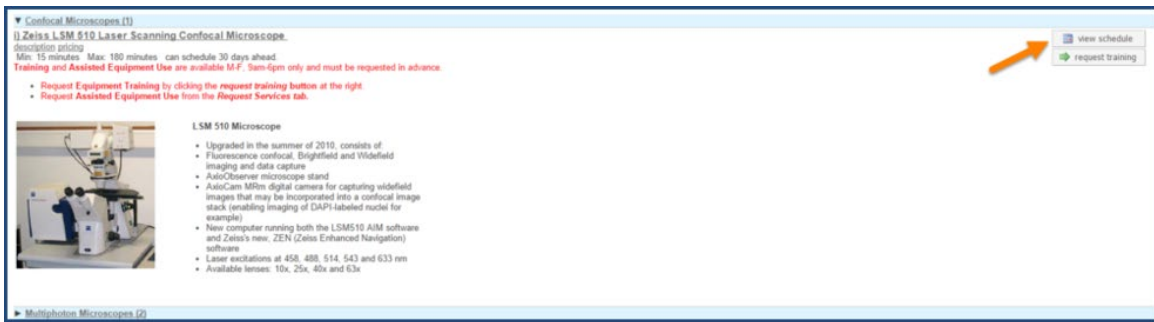


Next Steps

- All events completed via the calendar workflow process – will display as an option next time the core generates a billing event.
- Consult the iLab Core Manager User Guide for instructions on billing events, viewing invoices, refunds, and other system behavior.

Requesting an Equipment Reservation on behalf of a user

Most cores allow their customers to request reservations directly on the core's iLab site. However, Core personnel can request reservations on behalf of a user when needed.



1. Access your core's site. On the Schedule Equipment page, there will be a list of available instruments.
2. Click on the **View Schedule** button to the right of the instrument you would like to reserve.
3. Click and drag on the time frame you would like to schedule the reservation.
4. Select the user by entering the name of the person for which you wish to make the request and click the **Proceed** button.
 - a. Note: Make sure you are searching within "this institution" or "all" if you are looking for a user that has not yet used the core.
5. Complete the submission form.
 - a. Enter a description of the event in the **Event Notes** field (optional). This information will display on the calendar.
 - b. Be sure to complete all required fields marked by a red star.
6. In the **payment information** section, select the correct billing number from the **drop-down menu**.
 - a. Split Charge: The cost of equipment usage can be allocated across billing numbers.
 - i. To allocate across multiple billing number, click **split charge**.
 - ii. Select the additional billing number from the drop-down menu.
 - iii. Enter the % allocations to split the cost across the billing numbers.
 - b. Billing number Notes:
 - i. Lab members will need to be granted access to activated billing numbers by the PI and/or the Lab Manager.
 - ii. PI or Lab Managers will need to contact the department administrators to claim new billing numbers in iLab.
7. Select **Save Reservation** button at the bottom of the page to submit your reservation request.