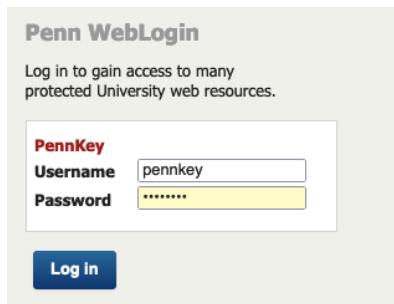


Scheduling Time on a Flow Cytometer in the Penn Cytomics and Cell Sorting Shared Laboratory

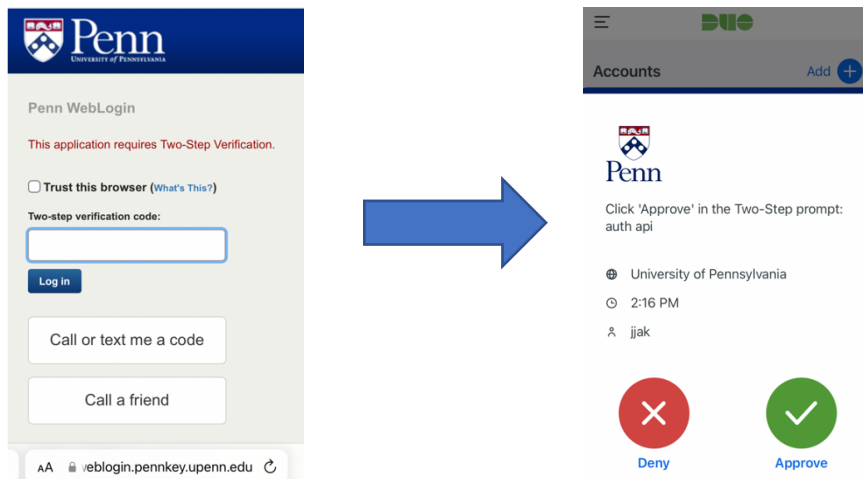
Note: You must have a valid email account and PennKey to use the schedule

Go to our home page at <http://www.med.upenn.edu/cytomics>. Under the *Menu* (top left corner,) select *Scheduler*.

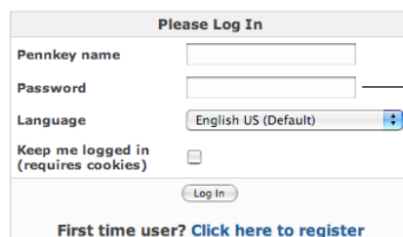
Log in with your Pennkey and password:



Use Duo Mobile to authenticate yourself on the device you are using:



If this is the first time you are ever logging into our system (i.e. IGG students), select *Click here* to register:



Enter the requested information. *Fields are required. Institution and position are optional. The Time Zone is GMT -5. Select *Register*

* Pennkey name (this will be your login)	flowuser
* Email address	flowuser@pennmedicien.u
* First Name	Flow
* Last Name	User
* Phone	215-898-3528
Institution	
Position	
* Password (6 char min)	*****
* Re-Enter Password	*****
Timezone	GMT -5
Keep me logged in (requires cookies)	<input type="checkbox"/>

[Register](#) [Cancel](#)

Requirements Before Booking a Reservation in Scheduler

You must have an active project/funding source to schedule a reservation. You can check what projects you have been assigned to by clicking *My User Profile* under *Menu* on the main Penn Cytomics webpage. (See image below) If you are not assigned to a funding source or if your funding source has expired, you will need to contact your lab’s Business Administrator (BA) or PI. Do not contact Penn Cytomics as we are unable to assign you funds.

Contact Info Delegates Email Filter Funding Sources

Funds

Name	PI	Expiration Date	Freeze Date
Training	Jonni S Moore		
QC	Jonni S Moore		
ADMIN	Jonni S Moore	2022-10-18	
entree_admin	Jonni S Moore	2022-10-18	
Flow	Jonni S Moore	2023-06-30	

Click tab to view your funding sources

You will not have self-scheduling privileges/access to any Penn Cytomics instruments until training is completed. Go to *Request Training* under the *Menu* drop down to request training. Once training has been completed, instrument access will be automatically applied to your *Scheduler* permissions. If you only require assisted sorting services by one of our staff members, training is not mandatory. See *EXCEPTION below.

***EXCEPTION:** If you only require assisted sorting services by one of our staff members, training is not mandatory. However, it is highly recommended that all new pilot experiments are tested on one of our analyzers BEFORE booking/running on any cell sorter. Please call the core at 215-898-3528 if you need staff assistance/consultation with a new experiment. Additionally, all assisted sort reservations can only be made by calling the core. You must be assigned to an active biosafety form for the cells you are sorting BEFORE scheduling a reservation. Go to *Biosafety Forms/Approvals* under the *Menu* drop down to submit a biosafety form. After submission, your PI will receive a request for approval, followed by our core. Please be as thorough as possible to prevent delays. All approved biosafety forms are valid for 3 years.

Anatomy of the Scheduler Main Page

Log out- ends the current session. If you share a computer, please log out as other people will gain access to your user profile and schedule. This can also minimize accidental bookings under the incorrect name.

My Control Panel- returns you to the main page.

The screenshot shows the phpScheduleIt interface with the following sections and callouts:

- My Quick Links:** A sidebar menu with options: Bookings, My Calendar, Schedule Calendar, Email Preferences, Email Administrator, Change Profile, and Log Out.
- My Announcements:** A section titled "Announcements as of 12/22/2022" with a note: "If you require additional instrument booking privileges, click Email Administrator. Never book appointments for anyone other than yourself. Otherwise you will be billed as a no show." A callout points to this section: "Important announcements regarding this calendar and facility access".
- My Reservations:** A table with columns: Start Date, End Date, Resource, Start Time, End Time, Created, Modify, and Delete. A callout points to this section: "List of all your pending appointments".
- My Invitations:** A table with columns: Start Date, End Date, Resource, Start Time, End Time, and Owner. A note below says "You do not have any reservations scheduled."
- My Reservation Participation:** A table with columns: Start Date, End Date, Resource, Start Time, End Time, Owner, and End Participation. A note below says "You do not have any reservations scheduled."
- My Permissions:** A table with columns: Resource, Location, Phone, and Notes. A callout points to this section: "List of instruments you have permission to use. If you feel that this is incorrect, contact the Penn Cytomics staff at 215-898-3528".

> My Quick Links ?

- » Bookings
- » My Calendar
- » Schedule Calendar
- » Email Preferences
- » Email Administrator
- » Change Profile
- » Log Out

Bookings- Use to view time availability and create bookings in the calendar.

My Calendar- View all your pending bookings on all instruments .

Schedule Calendar- Allows you to view all bookings on each instrument, in different views.
Email Preference- Can enable or disable emails notifications of your bookings and deletions.
Email Administrator- Email Penn Cytomics Staff with inquiries.
Change Profile- Edit your contact information.
Log Out- Log you out of the Calendar. *Warning: If you leave yourself logged in, anyone can have access to your calendar and book reservations in your name!* Please log out when finished.

Bookings- Display the available calendars

The screenshot shows the Symphony booking interface for the period 12/22/2022 - 12/28/2022. At the top, there are navigation options: "View schedule: Symphony" and "Choose the different Instrument schedule views here". Below this are two calendar grids for November and December 2022. A callout points to a highlighted day in the December grid with the text "Click Highlighted day to move to today".

Below the grids is a toolbar with buttons for "My Reservations", "My Past Reservations", "My Participation", "My Past Participation", "Other Reservations", "Other Past Reservations", "Pending Approval", and "Blocked Out Time".

The main part of the interface is a grid showing bookings for "Thursday, 12/23/2022" and "Friday, 12/23/2022". The grid has columns for time slots from 12:00am to 11:00pm. Callouts identify different booking types:

- "Someone else's booking": Points to a blue booking for "Leticia Rojas Cortez" on Thursday at 10:00am.
- "Your booking": Points to a blue booking for "Leticia Rojas" on Friday at 10:00am.
- "Note that only the Symphony A3 Lites are not greyed out. You only have permission to book these machines": Points to the "Symphony A3 Lite" rows in the grid.

Colors are important. Blue bookings represent your booking. Pale blue bookings represent other people's bookings. Burgundy bookings represent when the instruments are unavailable to schedule (maintenance or restricted time).

To create an appointment, hover over the box at the intersection of your desired start time. If it is green, click that time. You get this window:

The screenshot shows the "Modify Reservation" form for "Symphony A3 Lite B". Callouts provide instructions for various parts of the form:

- "Instrument being reserved": Points to the form title.
- "Optional email reminders for your appointments": Points to the "Reminder" dropdown menu.
- "Start and end times. There are no cross-midnight appointments. If required simply schedule twice": Points to the "Start" and "End" time fields.
- "Your contact information": Points to the "Name", "Phone", and "Email" fields.
- "To finalize your scheduled appointment, click Save": Points to the "Save" button.
- "Delete your reservation": Points to the "Delete?" checkbox.
- "Mandatory field when scheduling self-sorting appointments. Please type your nozzle size and the corresponding Biosafety ID for the sort you are performing that day.": Points to the "Notes" field.

In the Create Reservation window, first make sure the correct cytometer is selected at the top. Second, adjust to your desired start and end time, if available. Third, make sure that your contact information is displayed and correct. Finally, if all the previous information is correct, click the Save button.

To edit or cancel an appointment, click on the event to be changed. You will have a window identical to the Create Reservation, with the addition of a delete box, immediately above the save button.

Edit your reservation-make the changes required and click Save.

Cancel your reservation-check the delete box and click Save.

Note: If you cannot create, edit, or delete your reservation, you may be in that instrument's block out time (6 hours for Cantos, LSRII, Fortessa, A3 Lites and self-sorting Aria times, 36 hours for Symphony A5 and Spectral A5). Contact Penn Cytomics staff for help during this time.

Penn Cytomics Scheduling Policy

Scheduling: The SRL online scheduling calendar is available for trained users to reserve instruments up to 30 days in advance. Users may only schedule up to 3 hours of consecutive time during normal operational hours (Monday-Friday, 9am-5pm). Longer sessions are acceptable during off-peak evening hours and weekends (see Access Policy). High-parameter analyzers (A5/X-50/SE Symphonies) are excluded from this policy, as it is recognized that these experiments generally require a significantly longer time to complete.

The following policies have been implemented in order to maximize instrument usage:

In an effort to minimize placeholder reservations:

For cell sorter reservations (trained users only) and *most* analyzers: The scheduling calendar prevents adding, modifying, or deleting instrument bookings within a six-hour time window before a user's scheduled time.

For A5/X-50/SE Symphonies: The scheduling calendar prevents adding, modifying, or deleting instrument bookings within a 36-hour time window before a user's scheduled time.

If a user needs to schedule, modify, or delete a reservation within these time windows, they will have to call 215-898-3528 and speak to a staff member.

The SRL enforces a 72-hour cancellation policy for staff-performed cell sorting reservations; users are billed for the entirety of the scheduled time, unless the SRL can fill that time interval with another reservation.

Users may not "share" scheduled time with fellow lab members, as this will result in a double charge within the SRL billing system (User 1 is billed as a no-show, User 2 is billed for actual instrument usage). In this instance, User 1 should cancel their reserved time, and User 2 should reserve the instrument under their own credentials.