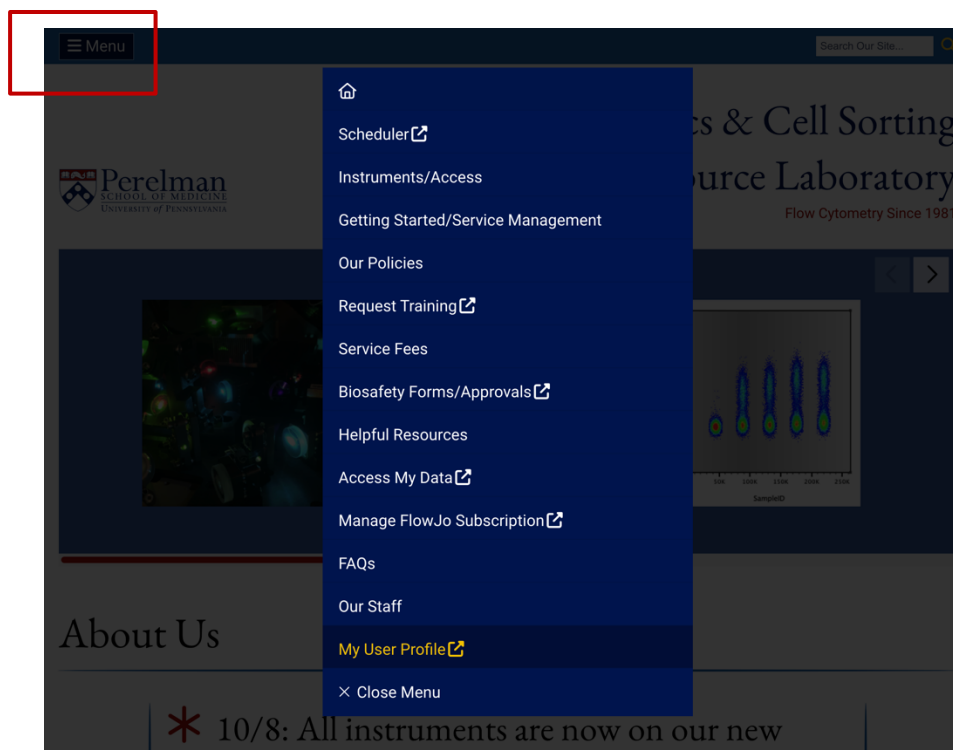


# Scheduling Time on an Instrument in the Penn Cytomics and Cell Sorting Shared Laboratory

## Account Setup

**You must have a valid email account and PennKey to use the scheduler.**

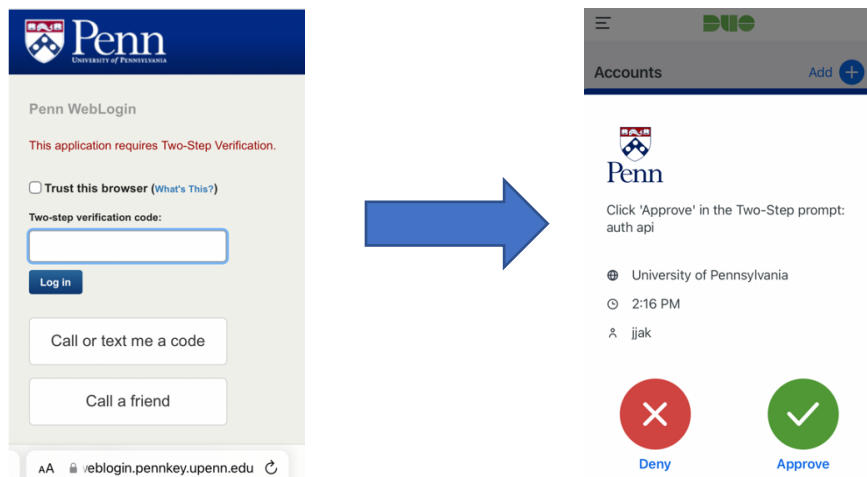
Go to our home page at <http://www.med.upenn.edu/cytomics>. Under the *Menu* (top left corner,) select *My User Profile*.



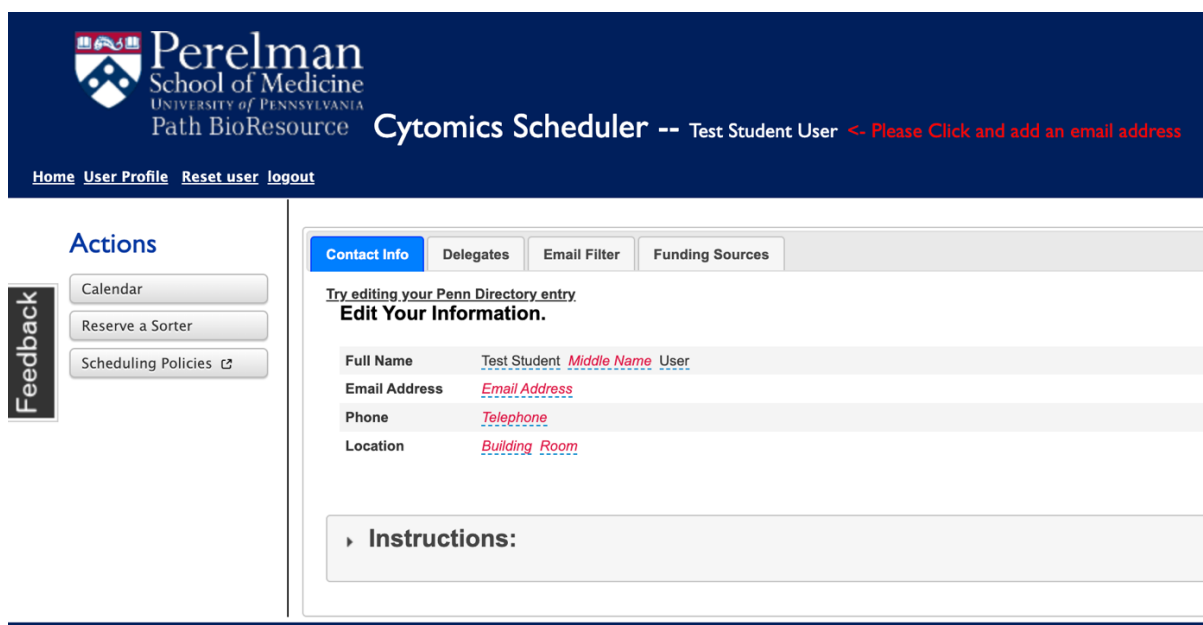
Log in with your Pennkey and password:

A screenshot of the Penn University of Pennsylvania login form. The form has a dark blue header with the Penn logo. Below the header, the text 'Log in with your PennKey' is displayed. There are two input fields: 'Username' and 'Password'. A blue 'Log in' button is positioned below the password field. At the bottom of the form, there are links for 'Forgot username?', 'Forgot password?', 'Change my password', 'Test my PennKey', and 'Privacy policy'.

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

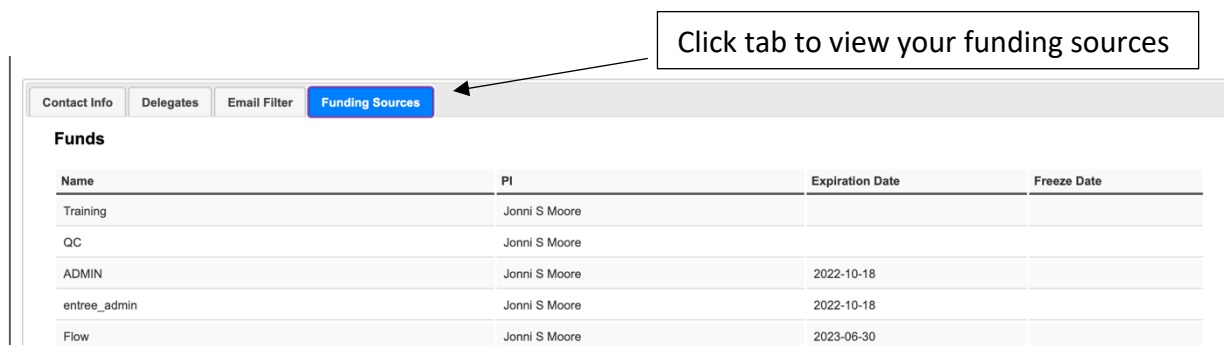


Enter your Email Address, Phone #, and Location under the *Contact Info* tab to complete your user profile.



## **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 the *Funding Sources* tab in your *User Profile*. 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.



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, it is highly recommended that you attend our Intro to Flow class before making your first booking. It is a 1-hour FREE class offered once a month. Additionally, all new pilot experiments should be 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.

## **Using the Scheduler**

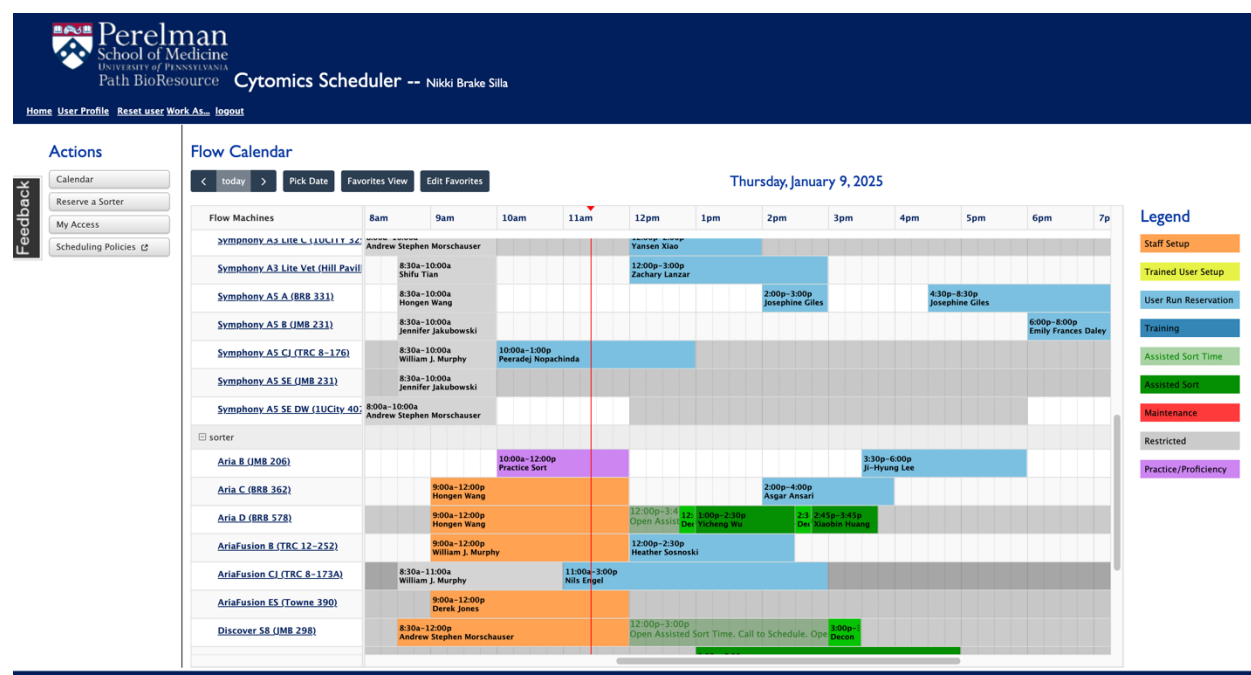
From the *Menu*, select *Scheduler*. A calendar view should appear for all analyzers, sorters, and cell prep instruments. (See image below)

**For self-operated reservations:** You will only be able to book on instruments that you have successfully completed training for AND that you have lab access to. You must be trained through our core facility to receive instrument privileges. For analyzers and cell prep instruments, click in the desired time slot/day in the Flow Calendar to make an instrument reservation. A box will pop up to add the required reservation details. Click Reserve to complete your request. For self-operated cell sorter reservations, click the Reserve a Sorter button under Actions. Choose the appropriate biosafety form for the cell type that you will be sorting. Then, click on the desired time slot/day in the Flow Calendar and enter the required reservation details. Click Reserve a Sorter to complete your request.

**For assisted-sort reservations:** Check the calendar for open “Assisted Sort Time” (light green blocks). Once you found a date and time that work for you, call the flow core at 215-898-3528 to book an assisted sort time with a staff member. Calling the core is the only way an assisted sort reservation can be made.

**For all instrument reservations:** You will receive a confirmation email with reservation details once your request has been submitted. You can also check the calendar to ensure that your reservation was saved successfully.

\*For more detailed information on making a reservation in the Flow Scheduler, check out our Scheduler Tutorial on our Penn Cytomics youtube page.



## Penn Cytomics Scheduling Policy

**Scheduling & Cancellations:** The SRL online scheduling calendar is available for trained users to reserve instruments up to 30 days in advance. To make a reservation, users must have completed the required training module for that instrument, and be assigned to a valid funding source. For cell sorters, users are required to have an active biosafety form for the cell type they are sorting in order to make a sorter reservation; this form must be approved by the user’s PI before Penn Cytomics approval. Users may only schedule up to 3 hours of consecutive time on analyzers 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/SE Symphonies) and sorters 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 and to minimize placeholder reservations:

- **For *most* analyzers:** The scheduling calendar prevents adding, modifying, or deleting instrument bookings within a 6-hour time window before a user's scheduled time.
- **For A5/SE Symphonies:** The scheduling calendar prevents adding, modifying, or deleting instrument bookings within a 36-hour time window before a user's scheduled time.
- **For cell sorter reservations (trained users only):** The scheduling calendar prevents adding, modifying, or deleting instrument bookings within a 24-hour window before a user's scheduled time. Same-day cancellations for trained users/self-sorting, will be billed a minimum charge of 75% of scheduled time.
- **For staff-assisted sort reservations:** All assisted sort reservations can only be booked/modified by calling the core. The SRL enforces a 72-hour cancellation policy; users are billed the entirety of the scheduled time, unless the SRL can fill that time interval with another reservation.
- **For training reservations:** The SRL enforces a 24-hour cancellation policy for cytometer training reservations. All no-shows and late cancellations will be charged a cancellation fee (See Penn Cytomics website for fee amount).

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

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.