

# ***The SickKids-UHN Flow Cytometry Facility at TMDT***

## **Instructions for Online Scheduling**

### **User Version 1.0**

#### **Introduction**

The SickKids-UHN Flow Cytometry Facility (FCF) is a Core Facility located at TMDT which employs an online booking system called “*phpScheduleIt*” to manage appointment scheduling for use of our analytical cytometers, cell sorters and other resources. If your institution has been granted access to our server, and you have registered for permission to use the services of our facility (download registration forms from [FCF Access and Location](#)), you can use *phpScheduleIt* to view the schedules, book, modify and delete appointments to use our instruments. Currently, labs located in TMDT, SickKids, TGH, OCI/PMH and U of T/MSB should have access to our server – please email the Facility Manager if you cannot access our server from one of these locations. You will also be required to use this software to book one of our facility equipment operators to sort cells or analyze data for you, as well as for training or acquisition using our analytical cytometers.

Please note that as of **March 25, 2008**, *phpScheduleIt* will be used for making **all** appointments to use our core facility resources. Appointments will no longer be accepted by email (outside *phpScheduleIt*), by phone, or in person. Please consult our website ([www.sickkids.ca/fcf](http://www.sickkids.ca/fcf)) for general information about our instruments, services, fees, registration forms, and booking and cancellation policies.

#### **Getting Started**

All investigator and user registrations must be made by downloading and electronically completing the appropriate form (for Internal or External Investigators). ***The completed form must be emailed from the Investigator’s institutional email address to the Facility Manager ([sheyun.zhao@sickkids.ca](mailto:sheyun.zhao@sickkids.ca)).*** Once you have submitted your registration, a temporary password will be emailed to you. This will be a temporary, system-generated password, which we recommend you change immediately. The email address you provided on the registration form will serve as your login ID. To begin using the system, go to the *phpScheduleIt* login page: <http://fcf.ccb.sickkids.ca>. Enter your e-mail address and password to login. You will then be taken to your personal home page (called “My Control Panel”).

Displayed on this personal page are any FCF announcements (under “My Announcements”), and any reservations you have previously made (under “My Reservations”). Please note that FCF instruments and operators are referred to as “Resources” in this program, and the user reserving a resource is referred to as the reservation “Owner”. You will not use the “My Invitations” and “My Reservation Participation” features for now.

Under “My Permissions” you will see a list of resources for which you are permitted to book appointments. You will only be allowed to reserve time on Resources appearing in this list. In general, you should have permission to book any analyzer (BD or Coulter)

you have been trained to use, as well as most of the sorters and all of the operators. Please notify one of our operators (by email) if you think your permissions need to be changed. The location, phone number and primary operator or FCF staff contact for each instrument are also displayed here.

On the left side of the page, under “My Quick Links”, are the tools you’ll need to use to view schedules, book appointments, and manage your email preferences. Clicking on the “?” icon next to “My Quick Links” opens a window that describes many features of *phpScheduleIt*. Please note that we have modified this program from its original version, so these descriptions may not be entirely correct, however they still provide a reasonable overview of the scheduling system and its functionalities. If you have questions about your permissions or user Account, use the "Email Administrator" link located in “My Quick Links” to contact the Facility Manager. Your “My Control Panel” page will look something like the one shown below:

The screenshot shows the 'My Control Panel' interface for 'THE SICKKIDS - UHN FLOW CYTOMETRY FACILITY @ TMDT'. The user is logged in as Andrew. The interface includes a navigation menu on the left with 'My Quick Links' expanded. The main content area is divided into several sections:

- My Announcements:** Shows an announcement for February 18, 2008, stating the facility will be closed for Family Day.
- My Reservations:** A table showing reservations for February 16 and 18, 2008, with columns for Start Date, End Date, Resource, Start Time, End Time, Created, Modify, and Delete.
- My Invitations:** A table with columns for Start Date, End Date, Resource, Start Time, End Time, Owner, Accept, and Decline. It indicates no reservations are scheduled.
- My Reservation Participation:** A table with columns for Start Date, End Date, Resource, Start Time, End Time, Owner, and End Participation. It indicates no reservations are scheduled.
- My Permissions:** A table listing resources, locations, phone numbers, and notes for various instruments and operators.

Resource	Location	Phone	Notes
Aria-GC	TMDT LAB 2-203	416-581-7610	Operator: Pier-Andr�e Penilla (M,W,Th,F); Leanne Jamieson (Tuesdays)
Aria-RITT	TMDT LAB 2-203	416-581-7610	Operator: RITT Operator
Aria-SC	TMDT LAB 2-203	416-581-7610	Operator: Michelle Tseng
BD LSRII-GC	TMDT LAB 2-504	416-581-7564	
BD LSRII-SC	TMDT LAB 2-504	416-581-7564	
Epics	TMDT LAB 2-203	416-581-7610	
FACSCalibur	TMDT LAB 2-504	416-581-7634	
FACScan	TMDT LAB 2-504	416-581-7564	
FC500	TMDT LAB 2-203	416-581-7610	
Influx	TMDT LAB 2-504	416-581-7564	Operator: Sherry Zhao
Leanne Jamieson			Training and Acquisition
Leanne Jamieson			Sorting
Michelle Tseng			Sorting
Michelle Tseng			Training and Acquisition
MoFlo	TMDT LAB 2-504	416-581-7634	Operator: Sherry Zhao
Pier Penilla			Sorting
RITT Operator			Sorting
Sherry Zhao			Sorting

## Schedules and Resources

Our instruments are currently organized into 4 different “Schedules”:

- 1) BD Analytical Cytometers: FACScan, FACSCalibur, LSRII-GC and LSRII-SC (to come online soon);
- 2) Coulter Analytical Cytometers: Epics and FC500;
- 3) BD Cell Sorters: Aria-GC, Aria-RITT and Aria-SC; and
- 4) MoFlo/Influx Cell Sorters” MoFlo, Influx.

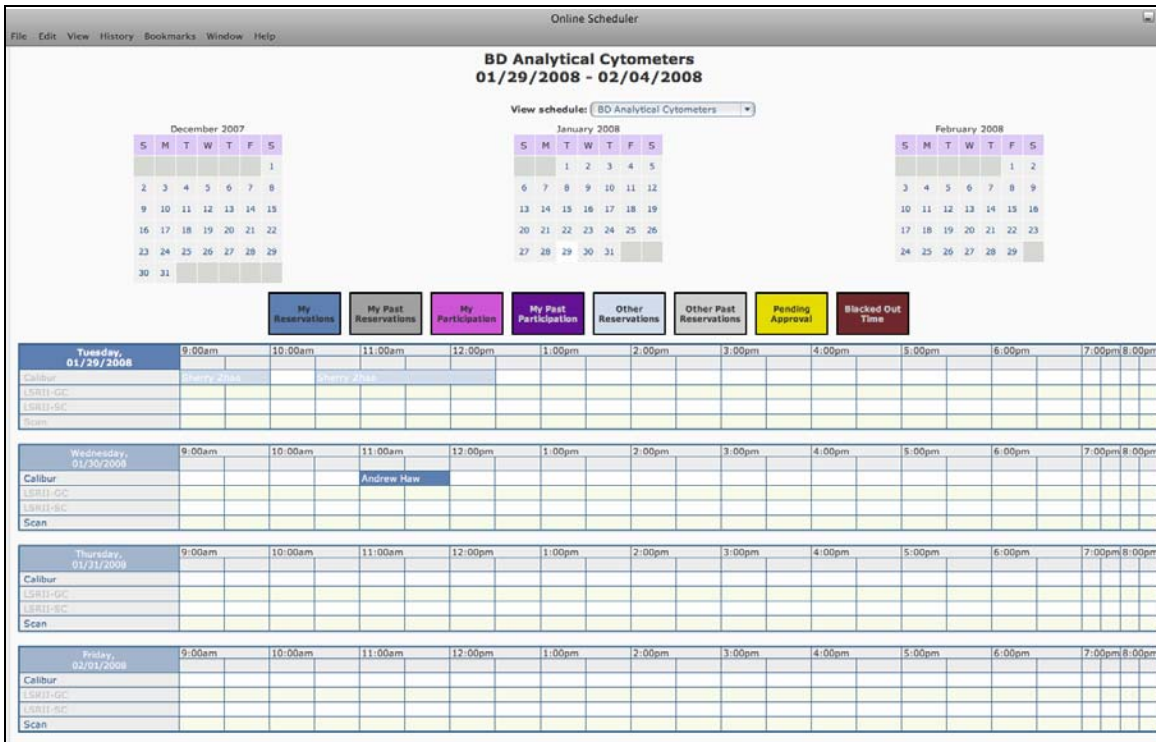
You can navigate between the different schedule calendars using the pull-down menu at the top of the page in the “Bookings” view. When booking, modifying, or deleting a

reservation, you will get an automatic email providing the details of the reservation. If you have questions about this reservation, please email the FCF Operator(s) responsible for that instrument. If you have general questions about using *phpScheduleIt*, please email the Facility Manager.

**Viewing Existing Reservations**

Before attempting to book an appointment you should view existing reservations for the time period and instrument of interest by clicking on the “Bookings” calendar. This will take you to a view of the current week, with all scheduled reservations for the selected instrument schedule (see below).

You can navigate between the different schedule calendars using the pull-down menu at the top of the page. The times (start and end) and owner of each reservation are displayed for each day. Current reservations for each instrument in that schedule calendar (i.e., instrument group) are shown for the current week. For analytical instruments you will see 7 days/week, for Cell Sorters you will see only 5 days/week. You can select a different week by clicking on any day in the monthly calendar at the top of the bookings page. Each day is divided into 15-min (sorters) or 30-minute (analyzers) blocks, with each analytical cytometer or cell sorter listed on a separate line. View the main details of any reservation by holding the mouse arrow over the name of the event. Clicking on the event name will open a new browser window showing all information about that event.



Click on “My Calendar” to see the current month’s calendar listing only your reservations. By clicking on the name of a reservation in this view, a new window will

open in which you can modify or delete events. Click on “My Control Panel” to take you back to your calendar home page.

### **Scheduling NEW Reservations**

Select the appropriate instrument schedule calendar from the pull-down menu at the top of the “Bookings” calendar view. As you move the mouse pointer over the blocks, the active block is indicated in green. To make a reservation, you can either click on the name of the desired instrument on a particular date, or you can double-click when the pointer is over your desired start time in that instrument’s row. Both of these actions will open up a new, smaller window (see below).

Use the pull-down menus to set the start and end times for your session – you may click on “Check Availability” to see if the resource is available during that time. Under “Summary” you may enter a brief description of your experiment or notes for the operator.

***It is imperative that you enter brief notes about the specific needs for your experiment (for example, "sterile sort", "100 micron nozzle" etc.), in the "Summary" so that the operator can set aside enough time to set up your sort.***

The reminder box to the right will instruct the scheduling system to send the owner an email to remind them of their reservation. By selecting the appropriate time ‘before reservation’ from the pull-down menu, the user is able to adjust when the reminder email will be sent.

Basic		Operators	Accessories
Location	TMDT LAB 2-504		
Phone	416-581-7654		
Notes	Operator: Sherry Zhao		
Reminder: -- Never -- before reservation			
<b>Please select the starting and ending times: (Pending Approval)</b>			
Start	End		
02/08/2008 2:00pm	02/08/2008 2:30pm		
Assistance	None		
Minimum Reservation Length: 1 hours			
Maximum Reservation Length: 4 hours			
<b>Will be reserved for:</b>			
Name	Andrew Haw		
PI or Lab Name	Guidos		
Phone	2054		
Email	robinhaw@hotmail.com		
<b>Summary</b>			
<input type="text"/>			
Save	Cancel	Check Availability	

phpScheduleIt v1.2.8

**REMINDER:** Please note that you need to include **a minimum of 15 minutes of set-up time** in all reservations for cell sorting. For example, if you want to sort for 1 hour, your Reservation should be 1 hr 15 min in length. Failure to include this set up time may result in your sort being terminated early in order to provide adequate time to set up for the next sort appointment. Please note, however, **that sorts requiring special set-up conditions** (eg., changing laser wavelength, single cell deposition unit) **may require longer minimum booking times, at the discretion of the operator.** For this reason it is critical that you inform the operator of any special needs in the "Summary" field of the "New Reservation" window as mentioned above.

Note that your booking must conform to FCF policy with respect to maximum advance time, minimum appointment time, and minimum cancellation notice. FCF booking policies are outlined in our [Booking Policies](#). If the time you requested is already booked or does not conform to the booking policy for that resource, you will get a message saying why the booking was not made. You will have the option to modify the times to conform to policy or to cancel the new reservation.

### **Accessories**

When scheduling the cell sorters, you should inform the operator of your requirement for an ACDU (cloning unit), as well as which lasers (other than Blue) you require. To view the list of accessories, press the "Accessories" tab in the "New Reservation" window. Select the accessory from the "All Accessories" list and press the right-pointing arrow button. Once the accessory has been added to the "Added Accessories" list you can press "Check Availability" to see if the cell sorter is available during that time, or click "Save" to finalize your reservation.

### **Operator Assistance**

In the "New Reservation" window, you are required to indicate whether you will need Operator Assistance during this appointment. The program will enter 'None' as the default. Leave the selection as 'None' if you will run your own samples on one of the analytical cytometers, and click "Save" to finalize your reservation.

***If you do require operator assistance, change the selection from 'None' to 'Acquisition', 'Training' or 'Data Analysis'.*** Select 'Acquisition' for all cell sorter bookings, or if you want FCF staff to run your samples on an analytical cytometer. If you want a training session on an analytical cytometer, select "Training". If you want to schedule an operator to analyze data files that have already been collected, select 'Data Analysis'. This will be the only circumstance in which you do not book an instrument at the same time as the operator.

The primary Operator for each instrument is listed under "Notes" in the "New Reservations" window. The operators are also listed by name on the schedule calendar. ***To tentatively book an operator, make a second reservation for the primary operator of the instrument you have just reserved. Please make sure to put the name of the instrument for which you are reserving them in the "Summary" field at the bottom of the "New Reservation" window.*** If the primary operator is unavailable, you may book a

reservation with one of the other operators listed if they appear to be available. Don't forget to book both an operator and an instrument (except if the appointment is for offline data analysis). If you fail to do so, the appointment will be deleted.

**For users who are not trained but want to book operator-assisted acquisition, they should book the operator only and put a note in the summary field specifying the instrument, fluorochromes and approximate number of samples. The operator will be responsible for booking the instrument.**

### **Reservation Approvals**

*All cell sorter and operator bookings (for Training, Acquisition or Data Analysis) require FCF approval.* Previously, these reservations were made in person, by email, or by phone with the Operator. Under the new system, *phpScheduleIt* will automate, streamline and accelerate this process. Generally, FCF staff will process approvals within 24 hours. In most cases, approvals will be granted as long as the resource is available and the operator does not have a time constraint or conflict. In those instances where the operator does not approve your booking – you will receive a system generated deletion notice. Usually the operator will also send you a personal email indicating the reason for declining your booking request.

Reservations requiring approval will be yellow-highlighted (Approval Pending) in “My Reservations” on your home page and in the “Bookings” calendar until they have been approved. No one else will be permitted to book a resource during the “Approval Pending” period. Once approved, a reservation will change color (yellow to blue) in the “Bookings” calendar and you will receive an email confirmation. FCF staff may be required to adjust your reservation request by shifting the time forward or back to accommodate their schedule. If this change is not acceptable to you, you may delete the reservation.

Please note that that booking the resource and equipment operator are separate transactions in the software. Your resource reservation will show on the calendar even if it has not been approved and whether or not the operator booking has been approved. However, all reservations requiring an operator are technically pending until the operator approves the reservation.

### **Modifying/Deleting a Reservation**

You can modify or delete any of your reservations (up to the minimum cancellation time as outlined in our “[Booking Policies](#)”). Only the reservation owner, or an operator, will be permitted to modify or delete a reservation. You will be able to view reservations owned by other users, but you will not have access to the editing link.

You can modify or delete your reservation by clicking on the “Modify” or “Delete” links next to it in the “My Reservations” list. This will bring up a pop-up window very similar to the “New Reservation” window. You have 2 choices; you can either modify the starting and ending times of the reservation, or you can click the "Delete" check box.



After making your changes, press the "Modify" button at the bottom of the form. Your new request will be evaluated against current reservations and a message will appear notifying you if the resource is available for the new times you requested. If you need to change times again, return to the modification window and select new times that do not overlap other reservations. After your reservation has been successfully modified, the schedule will automatically refresh. When modifying a reservation involving operator assistance, you must also ***make the same modification to the operator booking.***

If you are modifying a reservation for a resource requiring approval, the modification will have to be approved, and the modified reservation will be yellow highlighted to denote "Approval Pending". If you modified instrument and operator bookings for the same appointment, both modifications require approval.

If you open a reservation window but do not want to modify it, please click 'Cancel' rather than 'Modify' – otherwise the system will generate emails to you and the schedule administrator.

On occasion, an operator may need to modify your reservation after it was initially made and approved. Such modifications will be automatically reflected in your "My Reservations" list and on "My Calendar". You will be automatically emailed about such modifications.

### **Setting your e-mail preferences**

*phpScheduleIt* will automatically e-mail you when you are an operator create, modify or delete a reservation. If you desire, you can choose not to receive these automatically generated emails under "Email Preferences". However, ***we strongly recommend that you do not change these preferences***, to ensure that you do not miss any notifications about changes to your reservations.

### **Changing your login password**

The "Change Profile" link opens a new window where you may edit your login password. If you have forgotten your password, you can reset it and have a new one emailed to you. To do this, navigate to the login page and click the "I Forgot My Password" link underneath the login form. You will be redirected to a new page and asked to enter your email address. After clicking "Submit", a new, randomly generated password will be created. This new password will be set in the database and emailed to you. After receiving this email, please copy and paste your new password, login with it, and promptly change your password to a new personal, easy to remember password.