Preface

Welcome to the latest edition of the Analytical Centre Laboratory System (ACLS) Guidebook. The ACLS system is one of the leading advanced facility management tools available and it is now used in laboratories across Australia and the world. ACLS is recognised for the unparalleled support it provides as a management tool for large multi-user research facilities.

Complex multi-user research facilities are very much the way of the future for delivering access to major research instruments and infrastructure in the research sector. Efficient and effective utilization of our research resources leads to extraordinary opportunities both in education and research environments. The ALCS is a remarkable tool that ensures that research facilities can be allocated and maintained to a level which delivers the best scientific results.

UNSW gratefully recognises the achievements of Dong Ming in creating and developing ACLS. His unparalleled ability and commitment to the system is reflected in the quality, reliability and user-friendliness of the system and this has been recognised by the incredible list of major facilities that have adopted it all over the world. The ALCS has been able to adapt to the changing environment of modern multi-user facilities, their increased complexity, size and the growing diversity of users. The feedback provided by the many users of ACLS has been the key to its ongoing development and I would encourage all users to continue to provide feedback to the authors for improvements as they become evident.

Professor Les Field AM FAA
Vice-President and Deputy Vice-Chancellor (Research)
The University of New South Wales
Acknowledgements

This is the seventh edition of the ACLS Complete Guide. The series of ACLS guides witnesses the growth and evolution of the system over years. This publication was brought forward to ease workload at the end of year. In 2014, many enhancements and improvements have been accomplished, notably, mobile light version, virtual hub implementation.

In spite of his flat-out busy schedule, Professor Les Field, Vice-President and Deputy Vice-Chancellor (Research), graciously accepted the invitation to write the preface for this edition. I would like to thank him on behalf of ACLS community for his exceptional support and encouragement.

I would like to thank Professor Grainne Moran who has provided visionary leadership to this project. Furthermore, my thanks go to the entire MWAC staff. The ACLS relies on their vision, feedback, support and encouragement not only for its success but its very existence. Customisation details are fully documented in this edition, compliments of ANFF MCN, ANFF QLD Node, IHMRI and Deakin.

2014 has been a challenging year for ACLS to deliver many improvements on a limited budget. The next generation calendar is coming soon (late 2014) which will be able sync with Google Calendar, and possibly integrate with Outlook.

I look forward to working with you all to make continued improvements to ACLS.

Dong Zheng
ACLS Architect and Designer
Table of Contents

1 Introduction .................................................................................................................. 7
   1.1 Version Series ......................................................................................................... 8
   1.2 Internet Browsers ................................................................................................... 8
   1.3 Support Services .................................................................................................... 8

2 System Installation ....................................................................................................... 9
   2.1 System Requirements ............................................................................................ 9
   2.2 System Installation ............................................................................................... 10
   2.3 Logon Console ....................................................................................................... 11
   2.4 Data Backup ......................................................................................................... 12

3 Getting Started .......................................................................................................... 13
   3.1 Navigating ACLS ................................................................................................ 13
   3.2 Selecting the Business Model ............................................................................. 14
   3.3 Authentication Access ......................................................................................... 14

4 Registration ................................................................................................................ 18
   4.1 Select Login Name ............................................................................................... 18
   4.2 Register Users Manually ..................................................................................... 18
   4.3 Register Users Online ......................................................................................... 19
   4.4 Register Supervisors ........................................................................................... 26
   4.5 Logon to ACLS .................................................................................................... 27

5 Configuring ACLS ..................................................................................................... 28
   5.1 Configure System ............................................................................................... 28
   5.2 Configure Facility ............................................................................................... 34
   5.3 Access Group Definition ..................................................................................... 38
   5.4 Upload System Files ........................................................................................... 39
   5.5 Email Receiver Manager .................................................................................... 39
   5.6 Email Content Manager ..................................................................................... 40
   5.7 Link and Directory Manager .............................................................................. 40

6 Operating ACLS ......................................................................................................... 44
   6.1 My Dashboard ...................................................................................................... 44
   6.2 Make Bookings and View Bookings .................................................................... 45
   6.3 Calendar Settings ............................................................................................... 55
   6.4 Facility Group Calendar View ............................................................................. 57
   6.5 Change Others Future Bookings ........................................................................ 57
   6.6 Pre-Approval Bookings ....................................................................................... 59
   6.7 Set Min Booking Unit 15m vs 1h ........................................................................ 63
   6.8 About Min Hour Per Session ............................................................................. 65
   6.9 Check Current Facility Status ............................................................................. 65
   6.10 Set Up Accounts ............................................................................................... 66
   6.11 Manage Account Budget ................................................................................... 67
   6.12 Register a Project .............................................................................................. 71
   6.13 Search Users ...................................................................................................... 72
   6.14 Export User Data ............................................................................................... 73
   6.15 Broadcast Email Notices ................................................................................... 74
   6.16 Edit Booking Data and Usage Log Data ............................................................... 75
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.17</td>
<td>Generate Data Reports</td>
<td>76</td>
</tr>
<tr>
<td>6.18</td>
<td>Export Data Report</td>
<td>79</td>
</tr>
<tr>
<td>6.19</td>
<td>Generate Invoice Statement</td>
<td>79</td>
</tr>
<tr>
<td>6.20</td>
<td>Set Up Trainers and Certificates</td>
<td>84</td>
</tr>
<tr>
<td>6.21</td>
<td>Record User Forms</td>
<td>86</td>
</tr>
<tr>
<td>6.22</td>
<td>Store and Share Documents</td>
<td>88</td>
</tr>
<tr>
<td>6.23</td>
<td>Track Samples</td>
<td>92</td>
</tr>
<tr>
<td>6.24</td>
<td>Check-in Samples</td>
<td>93</td>
</tr>
<tr>
<td>6.25</td>
<td>Process Sample Jobs</td>
<td>95</td>
</tr>
<tr>
<td>6.26</td>
<td>Check-out Samples</td>
<td>96</td>
</tr>
<tr>
<td>6.27</td>
<td>Upload Sample Analysis Results</td>
<td>97</td>
</tr>
<tr>
<td>6.28</td>
<td>Access Experiment Data</td>
<td>98</td>
</tr>
<tr>
<td>6.29</td>
<td>Send Emergency Notices</td>
<td>98</td>
</tr>
<tr>
<td>6.30</td>
<td>Set Up Event &amp; Holiday Calendar</td>
<td>99</td>
</tr>
<tr>
<td>6.31</td>
<td>Training &amp; Support</td>
<td>103</td>
</tr>
<tr>
<td>6.32</td>
<td>Conduct Survey</td>
<td>105</td>
</tr>
<tr>
<td>6.33</td>
<td>Sending Mobile Message (SMS)</td>
<td>113</td>
</tr>
<tr>
<td>6.34</td>
<td>Mobile Access</td>
<td>117</td>
</tr>
<tr>
<td>6.35</td>
<td>Form Virtual Hub</td>
<td>119</td>
</tr>
</tbody>
</table>

**7 Frequently Asked Questions**

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1</td>
<td>Login and Logout</td>
<td>123</td>
</tr>
<tr>
<td>7.2</td>
<td>Online Registration</td>
<td>123</td>
</tr>
<tr>
<td>7.3</td>
<td>Book Facilities</td>
<td>124</td>
</tr>
<tr>
<td>7.4</td>
<td>Group Training Booking</td>
<td>134</td>
</tr>
<tr>
<td>7.5</td>
<td>Update User Information</td>
<td>135</td>
</tr>
<tr>
<td>7.6</td>
<td>Update User Supervisors</td>
<td>136</td>
</tr>
<tr>
<td>7.7</td>
<td>Data Report and Invoice</td>
<td>137</td>
</tr>
<tr>
<td>7.8</td>
<td>Batch Data Report</td>
<td>137</td>
</tr>
<tr>
<td>7.9</td>
<td>Manage Account Budget</td>
<td>140</td>
</tr>
<tr>
<td>7.10</td>
<td>User Training &amp; Certification</td>
<td>141</td>
</tr>
<tr>
<td>7.11</td>
<td>Register Forms and Documents</td>
<td>143</td>
</tr>
<tr>
<td>7.12</td>
<td>Track Training &amp; Support Requests</td>
<td>146</td>
</tr>
<tr>
<td>7.13</td>
<td>Track Samples</td>
<td>146</td>
</tr>
<tr>
<td>7.14</td>
<td>ACLS Logon Client Console</td>
<td>148</td>
</tr>
<tr>
<td>7.15</td>
<td>Access Experiment Data</td>
<td>149</td>
</tr>
<tr>
<td>7.16</td>
<td>LDAP</td>
<td>149</td>
</tr>
<tr>
<td>7.17</td>
<td>Notification To Facility (NTF)</td>
<td>150</td>
</tr>
<tr>
<td>7.18</td>
<td>Conduct Surveys</td>
<td>150</td>
</tr>
<tr>
<td>7.19</td>
<td>Virtual Hub</td>
<td>152</td>
</tr>
<tr>
<td>7.20</td>
<td>General</td>
<td>152</td>
</tr>
</tbody>
</table>

**8 Future Development**

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.1</td>
<td>Standard Packages</td>
<td>160</td>
</tr>
<tr>
<td>8.2</td>
<td>Plug-In Modules</td>
<td>160</td>
</tr>
</tbody>
</table>

**9 Appendix A – Modification for ANFF**

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.1</td>
<td>Modification for MCN</td>
<td>162</td>
</tr>
<tr>
<td>9.2</td>
<td>Modification for ANFF QLD Node</td>
<td>184</td>
</tr>
</tbody>
</table>

**10 Appendix B – Modification for IHMRI**

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
</table>

AC LAB SYSTEM
1 Introduction

Mark Wainwright Analytical Centre proudly presents the AC Lab System (ACLS): an online laboratory facility event booking (operation booking, user booking, training booking, commercial booking and service booking), sample tracking, training certification, incident reporting, support ticketing, induction program processing, survey creator, and information management system. By modular design, ACLS is flexible and can be customized. Users have the ability to access a range of facility and instrument information, enabling them to use the tools to make informed laboratory decisions. ACLS access can be authenticated either through a local authentication mechanism or through an active directory (LDAP) facility (including instrument) bookings, sample tracking and laboratory management system information, covering both time-based operations and sample-based operations. As a user of ACLS you will be able to achieve the following:

- Online registration and activation
- Online registration pathway
- Project-based, account-based or facility-based billing scheme
- Option to use either booking data or usage data through a facility console program for data processing and management
- Multiple event booking tools and multiple account/project options
- Booking confirmation and reminder produced with each booking, through iCAL, the booking calendar can be exported to local calendar programs, such as Outlook, Thunderbird, and MAC mail
- Calendar integration with Google calendar
- Multiple group sample tracking and reporting
- Email message broadcasts to user groups, staff groups, certificate groups and all supervisors (including mobile messaging SMS)
- Data reports and invoices
- Incident report and tracking
- Training & support ticketing system
- Survey creator
- Mobile messaging system
- Special plug-ins for:
  - bDRT: batch data report tool, an efficient tool to compile full data reports
  - bIST: batch invoice statement tool, an efficient tool to compile invoice statements
  - cCM: communication console module for data access and sharing
  - eDM: Excel data manager, to export user and system data information in excel files
  - hTrustNode: single sign on access in the trust virtual hub
  - iCAL: calendar sharing and export through iCAL protocol
  - iSurvey: survey creator, survey result analyser
  - IDAP: active directory authentication integration through LDAP
  - MobileLight: web version for mobile phones
  - tEB: training event booking tool
  - uEB: user event booking tool
1.1 Version Series

The latest web version is VISTA 2.2.6.x.

1.2 Internet Browsers

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

<table>
<thead>
<tr>
<th>Internet Explorer 8/9/10</th>
<th>Firefox</th>
<th>Safari</th>
<th>Chrome</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image.png" alt="Internet Explorer" /></td>
<td><img src="image.png" alt="Firefox" /></td>
<td><img src="image.png" alt="Safari" /></td>
<td><img src="image.png" alt="Chrome" /></td>
</tr>
</tbody>
</table>

1.3 Support Services

Should you have any feedback or require any support or assistance in running and operating the ACLS, please contact us at analytical@unsw.edu.au or dm.zheng@unsw.edu.au.
2 System Installation

ACLS is a web application and also a server/client application, comprised of HTML codes, java scripts and PHP scripts for the web application.

2.1 System Requirements

2.1.1 Server Hardware

The minimum hardware requirements are:

<table>
<thead>
<tr>
<th>CPU:</th>
<th>Core 2 duo above</th>
</tr>
</thead>
<tbody>
<tr>
<td>Memory:</td>
<td>Min. 4GB</td>
</tr>
</tbody>
</table>

2.1.2 Server Software

The software requirements are:

<table>
<thead>
<tr>
<th>Operating System</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Windows Server 2008 (32 bit)</td>
</tr>
</tbody>
</table>

2.1.3 Server Windows OS Language

It is mandatory to set the Windows OS language as "English" (United States).
2.2 System Installation

To install ACLS, insert the CD and double-click on CD Start. The installation will then commence.

The order of installation for ACLS is:

- Web server
- PHP engine
- Database engine
- System server

2.2.1 Web Engine

ACLS certifies the Abyss Web Server for the Windows Operating System.

Abyss Web Server (version X1 or X2) can be easily installed and configured, and it provides an automatic recovery facility and a remote administrator login console to manage the system remotely.

The web server is the first ACLS component to be installed. To install and configure the Abyss Web Server, please refer to ACLS Installation Guides (provided upon request).

2.2.2 Database Engine

ACLS uses the Borland Paradox Database Engine, which is a local database. The work to replace BDE with PostgreSQL is underway and targeted to be completed in 2014.

To install and configure the database engine, please refer to ACLS Installation Guides (provided upon request).
2.2.3 Logon Server

ACLS Logon Server fulfills the following major functions:

- Communicates with ACLS logon client program to register the user login/logout details, user information, facility information, project and account information, booking information and live notification.
- Based on the system configuration settings:
  - verifies the invalid user folders
  - verifies user photo availability.
- Port 1024 and 35120 are reserved for network communication with ACLS logon client.
- Generates log files, which record all the tasks undertaken.
- The Logon Server refreshes the parameter Tracing_Data_Date in the system configuration settings each day or within 5 minutes after execution. If this does not occur, the ACLS System Administrator will be prompted with an error message each time he/she logs onto the system through the web interface. However, you can disable the logon server check through the parameter LogonServerCheck on Configure System.

2.2.4 Email Server

ACLS Email Server performs the following tasks:

- Transmits broadcasting messages and notices.
- Sends out booking reminders and notifications.
- Executes bDRT and bDIS operation upon activation.
- The Email Server refreshes the parameter Email_Data_Date in the system configuration settings each day or within 5 minutes after execution. If this does not occur, the ACLS System Administrator will be prompted with an error message each time he/she logs onto the system through the web interface.

2.3 Logon Console

The Logon Console is installed on facility computers to interface with the ACLS Logon Server. If your lab opts for ACLS Logon Console configuration, the provided installer of ACLS Logon Console makes the installation straightforward.

To set up the server and client logon components, complete the following:

2.3.1 Server Settings

- Logon to ACLS through the web browser
- Add the facility or instrument through Facility Wizard, or
- Add the facility through Facility Manager and logon control through Facility Console Manager
- Verify the server firewall configuration to ensure the logon port 1024 and 35120 is On for the range of facility networks, for example, 10.1.1.0/24
2.3.2 **Console Settings**

- Edit the `logonclientcfg.txt` to replace the default server IP with your ACLS server IP

Following successful connection between the server and the client, the facility name will display on the logon client console window.

If you are unable to view the correct facility name, please verify the facility settings through the web interface.


2.4 **Data Backup**

ACLS system data should be backed up regularly by the stacking option. The following backup schedule is recommended:

- Base folder: daily
- Doc folder: twice weekly
- Pictures folder: twice weekly

We recommend an easy-to-use and efficient backup software named “Argentuma Backup” at [http://www.argentuma.com/backup.html](http://www.argentuma.com/backup.html).
3 Getting Started

Before you start running ACLS, it is important to understand each of the functions and what information you need prior to setting them up.

3.1 Navigating ACLS

You are able to navigate ACLS easily through the interactive menu on the left of the screen, click-expand and click-hide for sub-menus. The following snapshot is for admin view.
3.2 Selecting the Business Model

Prior to commencing using ACLS, you must consider which business model you will use to establish your laboratory. The business model determines how the rates will be applied to users’ bookings or usages, in other words, how to establish the cost centre for cost recovery of facility usages. Select one of the following business models:

3.2.1 Project-Based (Medical Labs)

The project-based model establishes the 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.

Project Manager is only available to the system configuration using ACLS Logon Console to form a closed-loop user log.

3.2.2 Account-Based (Commonly Used)

The account-based model calculates the rates according to the user accounts. The final billing is tied to the individual user accounts which include 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 Facility (Instrument)-Based (Commonly Used)

The facility (instrument)-based model ties the actual billing to the facility (including instruments) charging rate rather than the account rate or project rate.

The billing is tied to individual user accounts. For further information, refer to the Operating ACLS chapter.

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

3.2.4 Facility vs User Category-Based (ANFF MCN Customization)

This is a special modification for ANFF MCN. Please refer to Appendix A for details.

3.2.5 Membership vs Project-Based (ANFF QLD Node Customization)

This is a special modification for ANFF QLD Node. Please refer to Appendix A for details.

3.3 Authentication Access

There is a pre-defined accessing policy for each function as follows:
### Authentication Groups

<table>
<thead>
<tr>
<th>Authentication Groups</th>
<th>My Dashboard</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administrators</td>
<td>Full Access</td>
</tr>
<tr>
<td>Administration Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Management Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Equipment Supervisor</td>
<td>Full Access</td>
</tr>
<tr>
<td>General Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>User Supervisors</td>
<td>Limited Access</td>
</tr>
<tr>
<td>Standard users</td>
<td>Limited Access</td>
</tr>
</tbody>
</table>

### Authentication Groups

<table>
<thead>
<tr>
<th>Authentication Groups</th>
<th>Booking Calendar</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administrators</td>
<td>Full Access</td>
</tr>
<tr>
<td>Administration Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Management Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Equipment Supervisor</td>
<td>Full Access</td>
</tr>
<tr>
<td>General Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>User Supervisors</td>
<td>Facility Booking Only</td>
</tr>
<tr>
<td>Standard users</td>
<td>Facility Booking Only</td>
</tr>
</tbody>
</table>

### Authentication Groups

<table>
<thead>
<tr>
<th>Authentication Groups</th>
<th>Facility Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administrators</td>
<td>Full Access</td>
</tr>
<tr>
<td>Administration Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Management Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Equipment Supervisor</td>
<td>Full Access</td>
</tr>
<tr>
<td>General Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>User Supervisors</td>
<td>Full Access</td>
</tr>
<tr>
<td>Standard users</td>
<td>Full Access</td>
</tr>
</tbody>
</table>

### Authentication Groups

<table>
<thead>
<tr>
<th>Authentication Groups</th>
<th>Report Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administrators</td>
<td>Full Access</td>
</tr>
<tr>
<td>Administration Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Management Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Equipment Supervisor</td>
<td>Full Access except for batch data report and sample tracking report</td>
</tr>
<tr>
<td>General Staff</td>
<td>Full Access except for batch data report and sample tracking report</td>
</tr>
<tr>
<td>User Supervisors</td>
<td>Access to supervised booking and log data</td>
</tr>
<tr>
<td>Standard users</td>
<td>Access to user's own booking and log data</td>
</tr>
</tbody>
</table>
### Authentication Groups

<table>
<thead>
<tr>
<th>Group</th>
<th>Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administrators</td>
<td>Full Access</td>
</tr>
<tr>
<td>Administration Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Management Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Equipment Supervisor</td>
<td>No Access</td>
</tr>
<tr>
<td>General Staff</td>
<td>No Access</td>
</tr>
<tr>
<td>User Supervisors</td>
<td>No Access</td>
</tr>
<tr>
<td>Standard users</td>
<td>No Access</td>
</tr>
</tbody>
</table>

### User Profile

<table>
<thead>
<tr>
<th>Group</th>
<th>Profile Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administrators</td>
<td>Full Access</td>
</tr>
<tr>
<td>Administration Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Management Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Equipment Supervisor</td>
<td>Full Access, No power to approve new registration</td>
</tr>
<tr>
<td>General Staff</td>
<td>Full Access, No power to approve new registration</td>
</tr>
<tr>
<td>User Supervisors</td>
<td>Access to own profile and search by supervisor</td>
</tr>
<tr>
<td>Standard users</td>
<td>Access to own profile</td>
</tr>
</tbody>
</table>

### Track Samples

<table>
<thead>
<tr>
<th>Group</th>
<th>Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administrators</td>
<td>Full Access</td>
</tr>
<tr>
<td>Administration Staff</td>
<td>Password required</td>
</tr>
<tr>
<td>Management Staff</td>
<td>Password required</td>
</tr>
<tr>
<td>Equipment Supervisor</td>
<td>Password required</td>
</tr>
<tr>
<td>General Staff</td>
<td>Password required</td>
</tr>
<tr>
<td>User Supervisors</td>
<td>No Access</td>
</tr>
<tr>
<td>Standard users</td>
<td>No Access</td>
</tr>
</tbody>
</table>

### Staff Resources

<table>
<thead>
<tr>
<th>Group</th>
<th>Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administrators</td>
<td>Full Access</td>
</tr>
<tr>
<td>Administration Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Management Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Equipment Supervisor</td>
<td>Full Access, Information Only</td>
</tr>
<tr>
<td>General Staff</td>
<td>Full Access, Information Only</td>
</tr>
<tr>
<td>User Supervisors</td>
<td>No Access</td>
</tr>
<tr>
<td>Standard users</td>
<td>No Access</td>
</tr>
</tbody>
</table>
### Authentication Groups

<table>
<thead>
<tr>
<th>Authentication Groups</th>
<th>Survey Creator</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administrators</td>
<td>Full Access</td>
</tr>
<tr>
<td>Administration Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Management Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Equipment Supervisor</td>
<td>Limited Access to Survey Results</td>
</tr>
<tr>
<td>General Staff</td>
<td>Limited Access to Survey Results</td>
</tr>
<tr>
<td>User Supervisors</td>
<td>No Access</td>
</tr>
<tr>
<td>Standard users</td>
<td>No Access</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Authentication Groups</th>
<th>Facility Wizard</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administrators</td>
<td>Full Access</td>
</tr>
<tr>
<td>Administration Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Management Staff</td>
<td>No Access</td>
</tr>
<tr>
<td>Equipment Supervisor</td>
<td>No Access</td>
</tr>
<tr>
<td>General Staff</td>
<td>No Access</td>
</tr>
<tr>
<td>User Supervisors</td>
<td>No Access</td>
</tr>
<tr>
<td>Standard users</td>
<td>No Access</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Authentication Groups</th>
<th>System Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administrators</td>
<td>Full Access</td>
</tr>
<tr>
<td>Administration Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Management Staff</td>
<td>Full Access</td>
</tr>
<tr>
<td>Equipment Supervisor</td>
<td>No Access</td>
</tr>
<tr>
<td>General Staff</td>
<td>No Access</td>
</tr>
<tr>
<td>User Supervisors</td>
<td>No Access</td>
</tr>
<tr>
<td>Standard users</td>
<td>No Access</td>
</tr>
</tbody>
</table>
4 Registration

4.1 Select Login Name

ACLS provides three (3) options to set up a login name:

- The user's email address, e.g. xx@unsw.edu.au
- A short login name, e.g. abcd
- University-wide or organization-wide login ID upon enabling LDAP

The ACLS System Administrator has the power to configure the options of the login name types through Configure System.

4.2 Register Users Manually

User registration information can be entered manually or completed through online registration.

- For manual registration, only the system administrator and administrative staff can set up the registration information through User Profile Manager.

A user can be granted access to ACLS by the following:

- **Activate User Entry**: check this box to grant the user full permission to access the system. All staff members are empowered to use this.

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

Following user registration or user reactivation, select the **Send Confirmation Email** option if you require a registration confirmation email notice or reactivation email notice to be sent to the user.

Only administrative staff or system administrators can register new users. User photos are optional and can be uploaded to ACLS. A user's access to ACLS may be deactivated due to the unavailability of a photo, depending on the configuration settings at Configure System.
For further information on uploading a photo, refer to the FAQ chapter.

However, even if user access to ACLS is activated by following the above steps, you still need to complete the next step to permit a user's access to ACLS:

### 4.2.1 Project-Based

Following the registration of a user, switch to Project Manager to add the user to one of the active projects. Users are unable to make any bookings or access the ACLS logon console on facility computers without being assigned to a project.

### 4.2.2 Account/Facility-Based

The account/facility-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.

Following the completion of user registration, select Edit User's Accounts to make the account selection.

When you select Edit User's Accounts, you will be prompted to make a selection of valid accounts.

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 ever uses the account for bookings or logs.

### 4.3 Register Users Online

ACLS controls the online registration by a process divided into the following stages:

- User data entry
• Terms and Conditions Compliance

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

• Supervisor selection/entry

You can either select or enter the supervisor's name.
- **User photo (optional)**

  - Upon clicking on “Upload Photo (JPG)” button, a popup window appears to upload the user photo.

  - Once the photo is uploaded, the photo is shown for confirmation.
• Account (optional)

Depending on the selection, if it is internal, then 4 fields are required to be entered. If it is external, then no further details need to be provided at this stage.
• Facility of interest (optional)

Depending on the online facility registration setting in Facility Manager, users can select the facility of interest.
• Confirmation and submission

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

Once the user clicks on Submit, the registration application process is completed. The user and relevant staff members will receive registration notices.

• Approve online registration

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

### 4.4 Register Supervisors

A supervisor is registered in a similar manner to a user; however, you must select the supervisor position option to activate them as a supervisor.

Alternatively, a supervisor can be registered through **Supervisor Manager**.
4.5 Logon to ACLS

Enter your login email and password and click on Login.

There are two sections on the footer:

- **Top Section Line:**
  
  Including home page link (can be used to link to your organization site), privacy statement if any, contact us email link and organization name.

- **Bottom Section Line:**
  
  Including ACLS version number, version type, plug-in modules, and logon computer IP address.

Upon login, you will see the *My Dashboard* page which is the ACLS homepage. Through the distinctive color blocks, you can easily access the information you want.
5 Configuring ACLS

5.1 Configure System

When you commence using the system, you must verify the parameters defined in the system configuration panel to ensure they are set as required for your operations. Normally, ACLS is compiled and delivered in the configuration of your choice.

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

- CGI Directory: Directory for ACLS web access to retrieve the CGI files, including book.dll
- Data Directory: Physical directory location for all the system data files
- Server Name: The server IP or domain name (www.xxx.xxx.xxx)
- SMTP Server Name: The local SMTP server domain name
- Title To Show: The logon page title
- Title Beg & Title End: The web page title with format Title To Show. Title Beg. Title End

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>CGI Directory</td>
<td>Directory for ACLS web access to retrieve the CGI files, including book.dll.</td>
<td>For example: if hyperlink is <a href="http://localhost/cgi/book.dll">http://localhost/cgi/book.dll</a>, CGIDirectoryName should be “cgi”.</td>
</tr>
<tr>
<td>Data Directory</td>
<td>Physical directory location for all the system data files.</td>
<td>For example, if the actual directory pointing to the physical system data directory is “d:edomdata”, DataDirectory should be “d:edomdata”.</td>
</tr>
<tr>
<td>Doc Directory Name</td>
<td>Doc directory name for storing all the printable html files.</td>
<td>For example, if the actual directory pointing to the physical system data directory is “d:edomdata\doc”, DocDirectoryName should be “doc”.</td>
</tr>
<tr>
<td>Doc Web Directory Name</td>
<td>Doc directory name defined in web server configuration.</td>
<td>For example, if web server alias sets the virtual path “\doc” to link to “d:edomdata\doc”, DocWebDirectoryName should be “doc”.</td>
</tr>
<tr>
<td>Pictures Directory Name</td>
<td>Picture directory name for storing all the users’ photos.</td>
<td>For example, if the actual directory pointing to the physical user picture directory is “d:edomdata\pictures”, PicturesDirectoryName should be “pictures”.</td>
</tr>
<tr>
<td>Pictures Web Directory Name</td>
<td>Picture directory name defined in web server configuration.</td>
<td>For example, if web server alias sets the virtual path “\pictures” to link to “d:edomdata\pictures”, PicturesWebDirectoryName should be “pictures”.</td>
</tr>
<tr>
<td><strong>Configuring ACLS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Users Directory</strong></td>
<td>Directory for logon server program to search for inactive or illegal folder in the user’s folder. Only applied to ACLS configuration with ACLS logon console, and subject to “Data Storage Ctrl” settings. If “Data Storage Ctrl” is set to “Yes”, then it takes effect.</td>
<td></td>
</tr>
<tr>
<td><strong>Email Data Date</strong></td>
<td>For information only. Email server program updates the date to current date on daily basis; if not, ACLS may have a corrupted database.</td>
<td></td>
</tr>
<tr>
<td><strong>System Pass Date</strong></td>
<td>For information only. ACLS console program can be unlocked with the system pass. Only useful if ACLS logon console is in operation.</td>
<td></td>
</tr>
<tr>
<td><strong>Tracing Data Date</strong></td>
<td>For information only. Logon server program updates the date to current date on a daily basis; if not, ACLS may have a corrupted database.</td>
<td></td>
</tr>
<tr>
<td><strong>Active Users For Training Booking</strong></td>
<td>User selection list for training bookings. ![X] Show all users in selection list for training bookings ![✓] Show active users only in selection list for training bookings</td>
<td></td>
</tr>
<tr>
<td><strong>Booking Calendar Staff Only</strong></td>
<td>Enable/Disable booking calendar to users. ![X] Enable booking calendar to all (users and staff) ![✓] Enable booking calendar to staff only. This is the default.</td>
<td></td>
</tr>
<tr>
<td><strong>Booking Display All</strong></td>
<td>Show all facilities or per facility group. ![X] Show facility selection list per facility group ![✓] Show all facilities in one selection list</td>
<td></td>
</tr>
<tr>
<td><strong>Booking Only</strong></td>
<td>Switch ACLS reporting between usage data collected through ACLS console and booking data. ![X] Usage data through logon console ![✓] Booking only</td>
<td></td>
</tr>
<tr>
<td><strong>Calendar Multiple Days</strong></td>
<td>Show multiple day event on calendar. ![X] Show multiple day events through the separate top row of the calendar ![✓] Show multiple day events through the time continuously. This is the default.</td>
<td></td>
</tr>
<tr>
<td><strong>Clear Browser Cache</strong></td>
<td>Add the html page header to stop browser cache. ![X] Does nothing on cache ![✓] Add special cache header to stop browser cache. This is the default.</td>
<td></td>
</tr>
<tr>
<td><strong>Console Next Booking Update</strong></td>
<td>Show next booking on the ACLS console. ![X] Not showing next booking ![✓] Show next booking</td>
<td></td>
</tr>
<tr>
<td><strong>Console Notification</strong></td>
<td>Staff sending the notification to the console for urgent attention. ![X] OFF ![✓] ON</td>
<td></td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Status</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Daily Booking All Per Group</td>
<td>Show all facilities or per facility group as a function of Daily Booking. All Facility.</td>
<td>Show facility list per facility group selection list.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Show all facilities in one selection list.</td>
</tr>
<tr>
<td>Data Storage Ctrl</td>
<td>Enable/disable creating user folder and checking user folder. ONLY effective to server programs.</td>
<td>Disable</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enable</td>
</tr>
<tr>
<td>Enable Current Hour Booking</td>
<td>Enable/disable event change permission in the current hour.</td>
<td>Disable the change permission.</td>
</tr>
<tr>
<td>Change</td>
<td></td>
<td>Enable the change permission. For example, it is 12:20pm now, if it is enabled, users and staff can change the events starting from 12pm instead of 12:20pm.</td>
</tr>
<tr>
<td>Enable Facility Status</td>
<td>Enable/disable facility status page. Only applies when setting “Booking Only” to ON.</td>
<td>Disable facility status page.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enable facility status page.</td>
</tr>
<tr>
<td>Enable Facility Status Privacy</td>
<td>Enable/disable user photo on status page.</td>
<td>Disable user photo display when users access the facility status page. Only staff can view photos.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enable user photos display.</td>
</tr>
<tr>
<td>Enable Help Link</td>
<td>Enable/disable help URL on title bar. The default setting is disabled.</td>
<td>Disable</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enable</td>
</tr>
<tr>
<td>Enable Online Reg Project</td>
<td>Enable/disable project field in online reg form.</td>
<td>Disable</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enable</td>
</tr>
<tr>
<td>Enable Q&amp;A Search</td>
<td>Enable/disable questions and answers search.</td>
<td>Disable</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enable</td>
</tr>
<tr>
<td>Enable Session Hour Check</td>
<td>Enable/disable min booking unit check to each event.</td>
<td>Disable min booking unit check against each event.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enable min booking unit validation to each event.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If the booked hours are less than the min booking unit, the event is not saved.</td>
</tr>
<tr>
<td>Enable User Current Day Booking Change</td>
<td>Enable/disable the users’ permission to change the current day bookings.</td>
<td>Disable permission to change the current day bookings. For example, users can only change future bookings on the current day. For example, it is 12:20pm now, users can only change events from 12:20pm to midnight</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enable users to change events on the current day. For example, it is 12:20pm now, users can change any events on the day.</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Enable</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>EXCEL Password Protection</td>
<td>Enable/disable password protection to the exported EXCEL data files.</td>
<td><img src="https://via.placeholder.com/15" alt="Enable" /></td>
</tr>
<tr>
<td>Facility Charging</td>
<td>Enable/disable facility charging policy in Facility Manager.</td>
<td><img src="https://via.placeholder.com/15" alt="Disable" /></td>
</tr>
<tr>
<td>Https Enable</td>
<td>Enable/Disable https access depending on the web server settings.</td>
<td><img src="https://via.placeholder.com/15" alt="Disable" /></td>
</tr>
<tr>
<td>Invoice Accessible By Supervisor</td>
<td>Enable/disable supervisor access to the invoice statements.</td>
<td><img src="https://via.placeholder.com/15" alt="Disable" /></td>
</tr>
<tr>
<td>LDAP Pre-Configure</td>
<td>Auto-run tool to configure the user access through LDAP.</td>
<td><img src="https://via.placeholder.com/15" alt="OFF" /></td>
</tr>
<tr>
<td>Logbook Manager To Staff</td>
<td>Enable/disable general staff access to data logbook manager function.</td>
<td><img src="https://via.placeholder.com/15" alt="Disable" /></td>
</tr>
<tr>
<td>Login Using Email</td>
<td>Enable/disable email as login name.</td>
<td><img src="https://via.placeholder.com/15" alt="Disable" /></td>
</tr>
<tr>
<td>Logon Server Check</td>
<td>Enable/disable logon server daily synchronization check. If not running ACLS logon server, this should be switched off.</td>
<td><img src="https://via.placeholder.com/15" alt="Disable" />, this is the default</td>
</tr>
<tr>
<td>Logon Timer Ctrl</td>
<td>Enable/disable timer for ACLS Logon Client program.</td>
<td><img src="https://via.placeholder.com/15" alt="Disable" /></td>
</tr>
<tr>
<td>Multiple Click Prevention</td>
<td>Enable/disable multiple form submission through “Accept” button.</td>
<td><img src="https://via.placeholder.com/15" alt="Disable" />, this is the default</td>
</tr>
<tr>
<td>Online Reg Ctrl</td>
<td>Enable/disable online registration.</td>
<td><img src="https://via.placeholder.com/15" alt="Disable" /></td>
</tr>
<tr>
<td>Online Reg Visitor ID Compulsory</td>
<td>Set Student/Staff ID as compulsory entry field in registration form.</td>
<td><img src="https://via.placeholder.com/15" alt="Not compulsory" /></td>
</tr>
<tr>
<td>Project Manager</td>
<td>Enable/disable “Project Manager”.</td>
<td><img src="https://via.placeholder.com/15" alt="Project manager is OFF" /></td>
</tr>
<tr>
<td><strong>Report By Any Period</strong></td>
<td>Providing an option to generate a report by a period between any two months, or a period between any two dates.</td>
<td></td>
</tr>
<tr>
<td>-------------------------</td>
<td>----------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Restrict Bookings To General Staff</strong></td>
<td>If enabled, general staff are treated like a user, requiring a training certificate before any bookings can be made.</td>
<td></td>
</tr>
<tr>
<td><strong>Show Facility Info as Hyperlink</strong></td>
<td>Show the toggle link which is used to display the facility information including image, location, description and trainers’ contacts.</td>
<td></td>
</tr>
<tr>
<td><strong>Show Logon Client Password</strong></td>
<td>Show the system password to unlock console on My Dashboard.</td>
<td></td>
</tr>
<tr>
<td><strong>Training Support Request</strong></td>
<td>Switching on/off the function on My Dashboard</td>
<td></td>
</tr>
<tr>
<td><strong>User Account For Reg</strong></td>
<td>Enable/disable account entry in the online registration process.</td>
<td></td>
</tr>
<tr>
<td><strong>User Photo Availability Check</strong></td>
<td>Enable/disable user photo availability check</td>
<td></td>
</tr>
<tr>
<td><strong>User Photo For Reg</strong></td>
<td>Enable/disable user photo upload in the online registration process.</td>
<td></td>
</tr>
<tr>
<td><strong>Valid Email Login</strong></td>
<td>Enable/disable login name validation check</td>
<td></td>
</tr>
<tr>
<td><strong>LDAP Compulsory Check Text</strong></td>
<td>Set the default text string for LDAP compulsory control</td>
<td></td>
</tr>
</tbody>
</table>

- Set period between any two months
- Set period between any two dates
- No restrictions to staff with respect to making bookings
- Staff can only make bookings if they are qualified as a trainer or being trained
- OFF
- ON
- OFF
- ON
- OFF
- ON
- OFF
- ON
- OFF
- ON
- OFF
- ON
- OFF
- ON
- OFF
- ON
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>LDAP Text on Login Page</strong></td>
<td>Show a special text on login page to remind users using the organization-wide ID to access ACLS.</td>
<td>For example, “UNSW staff and students use zID/zPass to login”</td>
</tr>
<tr>
<td><strong>Online Reg Visitor ID</strong></td>
<td>Set as default external visitor ID</td>
<td>e.g. 000</td>
</tr>
<tr>
<td><strong>Server Name</strong></td>
<td>Should be web server IP address or domain name</td>
<td>e.g. <a href="http://www.xxx.xxx.xxx">www.xxx.xxx.xxx</a></td>
</tr>
<tr>
<td><strong>SMTP Server Name</strong></td>
<td>The local SMTP server domain name of the organization</td>
<td>e.g. smtp.unsw.edu.au</td>
</tr>
<tr>
<td><strong>Title Beg</strong></td>
<td>System web page title</td>
<td></td>
</tr>
<tr>
<td><strong>Title End</strong></td>
<td>System web page title</td>
<td></td>
</tr>
<tr>
<td><strong>Title To Show</strong></td>
<td>System title on logon page</td>
<td></td>
</tr>
<tr>
<td><strong>Commercial User Code</strong></td>
<td>Used for commercial booking</td>
<td></td>
</tr>
<tr>
<td><strong>Facility Status Image Height</strong></td>
<td>Set the facility image height Height of facility image shown in facility info page is defined as here</td>
<td></td>
</tr>
<tr>
<td><strong>Facility Status Image Width</strong></td>
<td>Set the facility image width Width of facility image shown in facility info page is defined as here</td>
<td></td>
</tr>
<tr>
<td><strong>Service User Code</strong></td>
<td>Used for logbook manager to catch the wrong login/logout, and also for service booking</td>
<td></td>
</tr>
<tr>
<td><strong>Version Control</strong></td>
<td>This is for building ACLS used by ACLS developer Information only</td>
<td></td>
</tr>
<tr>
<td><strong>FTP Host Name</strong></td>
<td>Data access through FTP</td>
<td>e.g. ftp.unsw.edu.au</td>
</tr>
<tr>
<td><strong>FTP Login</strong></td>
<td>FTP access user name</td>
<td></td>
</tr>
<tr>
<td><strong>FTP Password</strong></td>
<td>FTP access password</td>
<td></td>
</tr>
<tr>
<td><strong>Home Page Link</strong></td>
<td>Set home page URL at footer</td>
<td>If leave this blank, home link is not available at footer</td>
</tr>
<tr>
<td><strong>Privacy Statement Link</strong></td>
<td>Set privacy statement link at footer</td>
<td>If leave this blank, privacy statement link is not available at footer</td>
</tr>
<tr>
<td><strong>Contact Us Email</strong></td>
<td>Used for “contact us” in the footer section Should be a general email address for the lab contacts</td>
<td></td>
</tr>
<tr>
<td><strong>Reg Account Field 1</strong></td>
<td>Used as account field for account entry in the online registration process</td>
<td>If blank, then this field entry is disabled</td>
</tr>
<tr>
<td><strong>Reg Account Field 2</strong></td>
<td>Used as account field for account entry in the online registration process</td>
<td>If blank, then this field entry is disabled</td>
</tr>
<tr>
<td><strong>Reg Account Field 3</strong></td>
<td>Used as account field for account entry in the online registration process</td>
<td>If blank, then this field entry is disabled</td>
</tr>
</tbody>
</table>
### Configuring ACLS

<table>
<thead>
<tr>
<th>Reg Account Field 4</th>
<th>Used as account field for account entry in the online registration process</th>
<th>If blank, then this field entry is disabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adv Booking Reminder Day</td>
<td>Days for booking reminder sending out prior to the booked session time</td>
<td>Default: 2 days</td>
</tr>
<tr>
<td>Deactivate If No Access Period</td>
<td>Days for deactivating users if they have not used any facilities</td>
<td>Default: 120 days</td>
</tr>
<tr>
<td>Deactivate If No Picture Period</td>
<td>Criteria to convert the active user to inactive if their photo is not available for a specified period</td>
<td>Default: 120 days</td>
</tr>
<tr>
<td>Min Unlogged Time</td>
<td>Minimum time (in minutes) to accept the operational or usage time after login to instrument computer</td>
<td>Default: 5 minutes</td>
</tr>
<tr>
<td>Report Depth</td>
<td>Range of years for generating reports</td>
<td>Default: 1 year</td>
</tr>
<tr>
<td>Server Calendar Date Format</td>
<td>The format should tally with the server time format in regional setting</td>
<td>Default: mm/dd/yyyy (US format)</td>
</tr>
</tbody>
</table>

### 5.2 Configure Facility

Facility in ACLS refers to instrument, equipment, tool, device, or anything you wish to book. Before starting to set up facilities, you need to workout the facility grouping strategy. In other words, you need to set up groups for similar kinds or capabilities of facilities.

**Facility Wizard:**

This guides you through a ‘one-stop’ process to set up facilities, taking 5 steps to complete. Simply follow the process step by step to set up a new facility or change facility settings. Facility Wizard comes with assistance notes to explain each stage of the process, in the blue block below.
Set Up Facility Group Ownership:

You should exercise this only if you have multiple units at your organization. By setting this up, each unit owner(s) or staff-in-charge can administrate its own facilities, trainers and certificates.

Go to **Staff Resources -> Facility Manager**, click on button “Set Up Facility Groups”.

Click on button “Update Owner” to add or update the ownership.

Owners of the facility can be chosen from or above the equipment supervisor category only. Now the owners can manage their own facilities, trainers and certificates.
Facility Manager:

An experienced administrator can jump to Facility Manager and Facility Console Manager to make changes.

The facility information is described as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility Name</td>
<td>Full name of facility</td>
</tr>
<tr>
<td>Facility Group</td>
<td>Facility group name</td>
</tr>
<tr>
<td>Facility Image</td>
<td>Facility image, one per facility</td>
</tr>
<tr>
<td>Facility Description</td>
<td>Facility description for facility background information</td>
</tr>
<tr>
<td>Facility Location</td>
<td>Facility location, for example, room number, building name</td>
</tr>
<tr>
<td>Min Hour Per Session</td>
<td>Set the number of hours for each booking session.</td>
</tr>
<tr>
<td></td>
<td>System checks the booking event duration against the min hour per session.</td>
</tr>
<tr>
<td></td>
<td>If less, the event is rejected.</td>
</tr>
<tr>
<td>Min Booking Unit</td>
<td>Calendar hour scale can be 15 minutes or 1 hour</td>
</tr>
<tr>
<td>Compulsory Booking</td>
<td>If this setting is enabled, booking confirmation becomes compulsory for each</td>
</tr>
<tr>
<td>Confirmation</td>
<td>booking made; if disabled, users are able to decide whether they want to</td>
</tr>
<tr>
<td></td>
<td>have a booking confirmation for each booking made.</td>
</tr>
<tr>
<td>Training Certificate</td>
<td>Indicates whether the facility booking requires a user training certificate.</td>
</tr>
<tr>
<td></td>
<td>For example, some facilities do not require training to operate.</td>
</tr>
<tr>
<td>Pre-Approval Booking</td>
<td>If set this ON, facility bookings made by users are regarded as unapproved</td>
</tr>
<tr>
<td></td>
<td>bookings subject to trainer/manager approval.</td>
</tr>
<tr>
<td>Booking Enable</td>
<td>Enable or disable facility availability for booking</td>
</tr>
<tr>
<td>Operation Status</td>
<td>Active or inactive. For active facilities, training certificates and trainers</td>
</tr>
<tr>
<td></td>
<td>can be set up.</td>
</tr>
<tr>
<td>Facility Code</td>
<td>Facility ID for each facility identification</td>
</tr>
<tr>
<td>Recorded Created</td>
<td>Original date of facility creation</td>
</tr>
</tbody>
</table>

Booking facilities and non-booking facilities are processed separately. If the Facility Charging Scheme is selected in the system configuration, you will be prompted to enter the charge rate for both internal and external accounts.

In the example below, the internal accounts are UNSW accounts.

A chart of booking and non-booking facilities is available to give you a complete view of each facility setting.
Console Configuration:

Set up the console controls using the Facility Console Manager.

There are two ways to set up a facility ID to connect to the ACLS Logon Server, by its network IP address, or its Host ID generated by the console. The following parameters are required for setting up the console control:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility</td>
<td>Facility installed with console</td>
</tr>
<tr>
<td>IP Address:</td>
<td>TCP IP addresses for the instrument login computer; You can set a pseudo one if you decide to use booking data for reporting only.</td>
</tr>
<tr>
<td>Host ID:</td>
<td>Host ID shows at each console upon installation. System generates a random one the very first time.</td>
</tr>
<tr>
<td>ID Type:</td>
<td>Either IP as facility ID or Host ID as facility ID.</td>
</tr>
<tr>
<td>Connection Allowed:</td>
<td>ON/OFF.</td>
</tr>
<tr>
<td>Note</td>
<td>Notes relating to the console settings.</td>
</tr>
</tbody>
</table>
5.3 Access Group Definition

The Access Group Manager defines the level of access. There are 6 generic groups pre-defined in the system:

- System Administrator Group
- Administrative Staff Group
- Manager Group
- Equipment Supervisor
- General Staff Group
- Supervisor 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 start time for each day
- Booking end time for each day
- Booking end time offset for each day. If set to zero, ACLS will set one checkbox on the booking calendar to represent the offset period on the booking end time
- Booking cancellation: Whether the bookings are allowed (one day in advance) to be cancelled
- Weekend booking: whether weekend booking is permitted
- Group code: unique group ID
- Group of Privilege: access authentication
In 2014, maximum hours/week will be added to limit the number of hours that can be booked weekly.

5.4 Upload System Files

Through this file uploading function, you are able to upload all 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

For example, a user position text file should look like this:

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

5.5 Email Receiver Manager

You can customize the email notice receivers for an online registration request, budget manager, access denied and training & support. By default, an online registration notice, access denied notice and training & support notice all go to both the user who submits it and the email address set out in the Contact Us shown in the footer.
5.6 Email Content Manager

You can customize all email notice content to suit your lab environment. If you don’t set your own content, the system uses the built-in default content.

You can see clearly which content has been modified and which goes with the default settings.

The system provides Preview and Default buttons to enable you to see the difference. If you erase the modified contents, then the default settings will turn on automatically.

5.7 Link and Directory Manager

The objective of this function is to implement the future experiment data secured access and sharing. There are 6 functions as follows:
Configuring ACLS

- Facility FTP Access Directory:
  - In the current design, FTP access is a one-access account only to all registered users. The future plan is to achieve FTP service per user account. Through this function, you need to set up data access to each facility experiment data.
  - On My Dashboard, the user can submit a request to acquire the FTP access information, or use the provided FTP link to access data through Internet browsers.

- General FTP Access Directory:
  - Through this function, you can set up data access to non-facility FTP services. For example, if you have common shared data folders (such as archive and public) with all the registered users, then you can set this up as in the screenshot below.

- Online Help Link
  - Online help link is optional. By default, it is disabled. The default setting is http://www.analytical.unsw.edu.au/capability/acls.htm. However, you can customize this to your own web or doc link.

- Online Registration Link

- Labs may wish to run their own online registration process or forms. You can set up a registration URL so when users click on To Register, the link takes them to your own registration process or forms.
• Facility Information Link

  ▪ Labs may provide additional information about any facility, status, maintenance plan and more on separate websites. You can make these available to users at every booking page and facility status page.

  ▪ Setting up is straightforward:

    ![Image of FACILITY INFORMATION LINK SETTINGS]

    ▪ The question mark logo shows up as in the following example. Click on ![Image of facility status]

      ![Image of facility status]

      to access the external facility information page.

• Net Drive Setting:

  ▪ This needs to work with the ACLS login console program, which is installed on the facility computers. If you set this up, then when the user logs on to the facility, the console dynamically maps the network drive as pre-defined so that users can save the results to the network data storage devices.

  ▪ You need to define the following parameters for the console to connect with the network drive as follows:

    ▪ Drive: telling console what drive label is used for connection, don’t use C to G as most Windows computers use these for local drives
    ▪ Folder: as a protocol of network drive mapping, you should set out the full path as standard
    ▪ User Name: authentication of connection
    ▪ Password: authentication of connection
    ▪ Per Facility: this is optional. You can set up an individual folder connection to each individual equipment or facility listed in Facility FTP Access Directory.
For further information on net drive configurations, please refer to Appendix E.
6 Operating ACLS

6.1 My Dashboard

My Dashboard could be the first page you see when you login, depending on your calendar settings. Depending on the access permissions set for you in the system, My Dashboard offers brief information about your work in ACLS and quick access to certain functions:

- Need Attention:
  - User registration pending approval
  - Active user without account
  - Active account expiring within one month
  - Project expiring within one month
  - Reported Incident status: coming in 2014
- Lab Event Calendar: shows the events in the current month, you can click on the month link to view the monthly events
- Training & support:
  - Lodge new request
  - Process requests by staff
  - Search requests
  - Search solutions
- Access Documents:
  - Access to general documents (policy, meeting minutes, etc.), and facility related documents (training materials, etc.)
- Access Forms:
  - Access to user's form, such as induction form, OHS form, etc.
- Access Data:
  - Request for FTP information
  - Access data
- Access Console Password
- My Bookings This Week
- Service Bookings This Week
- My Account/Project
- My Trainer Certificates
- Access Sample Job Report
- Access Sample Job Summary
- Access Invoices

The click and expand option is widely used on My Dashboard to access information.
6.2 Make Bookings and View Bookings

Click on Booking Calendar from the ACLS navigation menu, and the booking tools show up for further action depending on your level of access.

**Staff menu:**

![Staff menu](image)

**User menu:**

![User menu](image)

The difference between staff menu and user menu is that user menu shows the eligible facility list they are allowed to book, and staff menu shows the booking tool list.
The calendar works similarly to an Outlook web calendar, or Google calendar. Two levels of validation are programmed to ensure there are no double bookings, validation at user browser level, and at server level.

### 6.2.1 Facility Booking

Facility booking is to book events for yourself. Select facility, month and year, clicking on ‘Continue’.

The color scheme gives you a quick presentation about the different types of bookings. The click-to-expand information box shows you the booking controls and permissions.

The system blocks past dates in blue, as you are not permitted to book these. Clicking on the **Blocked Dates** won’t have any effect. You can easily navigate the calendar to day and week view by clicking on **Date** serving as the active link. **List** view shows you a summary of bookings made in the selected month.

You are able to print the calendar in PDF in any view by clicking on the **Print** button.

Go to **Filter By** to view individual user bookings if there are too many bookings on the calendar page.

- **Save bookings:**

  **Two Steps** are required to save bookings:

  - **Step 1**: Create bookings on the screen
- Clicking on ‘Save’ to save the bookings on the screen. You can create many sessions on the screen at this stage.

- **Step 2: Save bookings to system**

  - Click on **Save Changes** button to save the bookings, the system refreshes the page and you can check the calendar to make sure your bookings are saved correctly.
- Each booking tool comes with its own template, but the method of creating, editing and saving bookings is the same.

### 6.2.2 User Booking

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

### 6.2.3 Individual Training Booking

This booking tool enables staff to book a training session for users. The difference between user booking and individual training booking is that a user booking is regarded as a normal operation booking (similar to Facility Booking), and a training booking shows as training in the report.

When you click **Save Changes**, the system sends the booking confirmation notice to the booked user and the staff member who has made the booking.
6.2.4 Group Training Booking

This booking tool allows staff to book events or sessions for multiple users at one time. When you click Save Changes, the system sends the 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.

6.2.5 Commercial Booking

Commercial booking is only available to staff members and is used to book a facility for special commercial operations.
6.2.6 Service Booking

Service booking is only available to staff members, allowing them to book facilities if they require maintenance or service. The service bookings will overwrite any users' bookings, and email notifications will be automatically sent to the users of any bookings cancelled due to facility servicing.

To overwrite current bookings, you need to create a new service booking to take the same time as the current bookings, then click on **Save Changes** to save the service booking and the system automatically removes the **Conflicted** current bookings.

Service booking is used to book service events. Simply drag the booking box to the time you wish to make the service booking and the system will replace those earlier bookings when you click on **Save Changes** button.

**Snapshot of the example:**

Service booking on the screen:

When you click the **Save Changes** button: the current booking is replaced by the service booking.
6.2.7  Booking Ruler on Week and Day View

You may notice a green color block moving with your mouse movement. This is the newly introduced booking ruler. For each facility, there is a setting called hour per session. Hour per session defines the minimum session duration for each experiment. For example, TEMS900 requires a minimum of 2 hours to complete one session. So the booking ruler shows a block of 2 hours. When clicking on the calendar date, the popup event template automatically sets the duration to 2 hours to minimize the risk of booking insufficient hours. However, the ruler only sets this time as a guide, and you are able to change its length.
6.2.8 **Booking for Today**

A special approach is required to book events or sessions for TODAY. Due to the time blocking on TODAY, clicking on month view may not work, so you need to switch to Day/Week view by clicking on **Date** link.

In month view:

TODAY is 23rd, click on 23 to switch to week view:
Click on **Tue, July 23** to switch to Day view of TODAY:

Date text serves as the active link between month view and week view, and between week view and day view.

### 6.2.9 About Offset Setting behaviour in Calendar

An offset setting is available in group setting through Group Manager. It helps users to book overnight, ticking on one booking unit to book the next 8 hours, for instance. The offset booking setting is still in effect. Here are a few case studies as examples:

**Case 1:**

<table>
<thead>
<tr>
<th>Booking start time</th>
<th>8am</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking end time</td>
<td>6pm</td>
</tr>
<tr>
<td>Offset</td>
<td>4 hours</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>The above setting is the same as below: Booking start time: 8am Booking end time: 10pm</td>
</tr>
</tbody>
</table>
**Case 2:**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking start time</td>
<td>8am</td>
</tr>
<tr>
<td>Booking end time</td>
<td>6pm</td>
</tr>
<tr>
<td>Offset</td>
<td>10 hours</td>
</tr>
</tbody>
</table>
| **Description**   | The above setting is the same as below:  
Booking start time: 8am  
Booking end time: 4am (next day)  
You cannot book multiple day events, as each day you are only permitted to book from 8am to 4am (next day) |

**Case 3:**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking start time</td>
<td>8am</td>
</tr>
<tr>
<td>Booking end time</td>
<td>6pm</td>
</tr>
<tr>
<td>Offset</td>
<td>14 hours</td>
</tr>
</tbody>
</table>
| **Description**   | The above setting is the same as below:  
Booking start time: 8am  
Booking end time: 8am (next day)  
You can book a multiple day event. However, the booking start time can only be 8am |

### 6.2.10 Repeat Booking

Depending on your booking permission, ACLS provides you a repeat booking capability for the Facility Booking tool.

- If max day/period permission is greater than 14, then week repeat is available;
- If max day/period permission is greater than 30, then week repeat and month repeat are available.
6.3 Calendar Settings

ACLS provides a way to customise the calendar and home page upon login. There are 3 settings related to the calendar that you can control:

- Calendar view: week view only or month view
- Calendar popup: single mouse click or double click
- Home page upon login: My Dashboard or booking calendar
Week View vs Month View:

- Choosing week view: means when you access the booking calendar, the calendar view is week view.

Single Click vs Double Clicks:

- Choosing single click means when you click on the booking calendar cell to make bookings, you just need to do a single click.
- Choosing double click means when you click on the booking calendar cell to make bookings, you need to do a double click.
6.4 Facility Group Calendar View

You are able to view multiple facility calendars on one page. There are two kinds of facility group calendar view:

- Selected facility calendar view: available to all
- Facility group calendar view: available to staff only

If you save the selected view as favorite, then next time, you can click on My Favorite to view the bookings.

6.5 Change Others Future Bookings

This is available to staff only. The nominated staff group can change anyone's bookings through User/Approve Booking.

By default, this capability is disabled.

Please keep in mind that any future bookings can only be changed by the person who made the booking, or cancelled through service booking. If you enable this booking edit capability, you risk changing the bookings of others without their permission or by mistake. So it is highly suggested that you should not enable this (unless you are so determined and ready for PR (public relation) issues if any).
**Enabling Edit Booking: (Admin Only):**

Go to *System Settings* -> *Configure System*, click on *Future Booking Edit Permission*.

Tick the radio to select the staff group with the power to change bookings at their will.

After selection, click on *Accept* to save the setting.

**User Booking Calendar:**

Obviously, all the events on the calendar are changeable as they are highlighted in green.
6.6 Pre-Approval Bookings

The implementation of pre-approval of a booking is illustrated below:

If the facility is defined such that all the bookings made by users are subject to approval by the trainers, then any bookings made by users are treated as “unapproved” booking events.

When bookings are made, all the trainers receive an email notice and any of the trainers can approve or decline the “unapproved” bookings.
Approve Bookings:

Only trainers can approve “unapproved” bookings through User/Approve Booking.

Clicking on the “unapproved” event, a booking template shows up as below:

You need to select the “Approved” radio and click on “OK”, then save changes to give approval.

Decline Bookings:

Simply delete the “unapproved” booking to decline it.

Direct Access To Unapproved Bookings on Dashboard:

If you are the listed trainer, there is a quickway you can approve or decline unapproved bookings without going through the calendar.
The indicator shows that there is one outstanding unapproved booking for action. Click on the dashboard link, you can zoom in on the details.

**Direct Links To Approve/Decline Unapproved Bookings:**

In addition to the quick access through 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**

None of the “unapproved” bookings are included as “valid” bookings in reports and invoices.

**Mobile Version**

The following snapshot explains how it works.

- If you are the trainer, you are able to approve or decline an “unapproved” booking event.
- You are able to 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.
6.7 Set Min Booking Unit: 15m vs 1h

ACLS is used to set the minimum time interval for booking calendar either 15 minutes to all facilities or 1 hour to all facilities. Now you are able to set a minimum booking unit to each facility individually. In other words, some can be 15 minutes, some can be 1 hour.

Go to Staff Resources -> Facility Manager, pick the Min Booking Unit which suits your need.

- If set to 15 minutes
  
  Time interval on booking calendar is set to 15 minutes as shown below.
• If set to 1 hour

Time interval on booking calendar is set to 1 hour as shown below.
6.8 About Min Hour Per Session

Min Hour Per Session prevents under-booking issues being faced by labs. The default setting of session time is 15m or 1 hour depending on the choice set in Facility Manager. For example, if TEM 200 experiment needs min 2 hours per session, the system checks each booking session time to ensure the min 2 hours are booked, otherwise the booking is blocked and cannot be saved.

Admin/manager can go to Staff Resources -> Facility Manager, pick a facility and edit, then change the field “Min Hour per Session” to the min hours required. That is it, simple and straightforward!

ACLS reviews each booking event session time to check if it is less than the min hour per session. If less, the booking is blocked and cannot be saved. An alert indicator is shown at the top right-hand corner.

Go to Staff Resources -> Facility Manager, pick the min booking unit which suits your need.

6.9 Check Current Facility Status

Click on Facility Status to view the status of the facility: booked/in-use or available. The system displays both the current booking status of each facility and the current log status if ACLS Logon Console is installed onto the facility or instrument computers.

Instant user photo display and “click-show” information boxes are available to provide user and booking information.

Each facility name serves as a hyperlink to show facility information, including image, description, location and trainers.
6.10 Set Up Accounts

There are two ways to set up accounts: through **User Registration**, or through **Account Manager**.

The account manager screen requires the following information.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Account numbers or names provided by users upon registration</td>
</tr>
<tr>
<td>Account Type</td>
<td>Internal or external</td>
</tr>
<tr>
<td>Charge/Hour</td>
<td>Charge rates (depending on business model, for facility charge scheme, you don’t need to set this field up)</td>
</tr>
<tr>
<td>Note</td>
<td>Remarks for accounts</td>
</tr>
<tr>
<td>Expiry Date</td>
<td>Expiry date of account</td>
</tr>
<tr>
<td>Account code</td>
<td>Used for system administration purposes</td>
</tr>
<tr>
<td>Recorded Created</td>
<td>Original date of account creation</td>
</tr>
</tbody>
</table>
6.11 Manage Account Budget

Through *Budget Manager*, you can track each account balance, received payment, operation cost and the finance report. Budget management uses the budget envelop mechanism. Each budget envelop is set up for only one account, and only one account can be assigned to any one budget envelop at a time.

Four major functions are available in *Budget Manager*:

- **Budget Envelop**:
  - Create budget envelopes
  - Edit budget envelopes
- Parameter descriptions:

- **Budget name:** by default, it is the same as the account name to make it easy to identify. However, you can change this to any name.
- **Account:** account for the budget envelop.
- **Start date:** it is recommended that the budget envelop start date is the first date of the first month of the financial year.
- **Expiration date:** the system assigns the expiration date of an account as default. It is recommended to take the last date of the last month of the financial year.
- **Note:** for any special notes.
- **Rollover enable:** if enabled, you can do a rollover. If not, then this budget envelop is disabled and you can use this budget envelop for bookkeeping only.
- **Rollover schedule enable:** not in use.
- **Rollover schedule date of month:** not in use.
- **Email alert enable:** if enabled, the system runs an auto-check against the Alert Threshold of Budget Balance. If the balance is below the minimum, the system sends out an alert to the affected users and the staff members activated through Email Alert Configure. If not, the system will not run any checks against the minimum balance.
- **Days to deactivate account:** if set to 0 (zero), it means that the system will not run a check against the minimum balance for account deactivation. If set to one or more days, the system will run a check against the minimum balance, and deactivate the account after the number of days set in this option when budget balance is below the minimum. So once the account is deactivated, user access to ACLS may be stopped, depending on the number of active accounts they hold.

- **Received Payment & Operation Cost:**

- **Bookkeeping for received payment:**

You can view the history of received payment and operation cost entry at any time.
- Bookkeeping for operation cost, such as material cost, labour cost, etc. However, this does not refer to facility booking or usage charge, or sample service charge.

- Note: Before budget rollover, you can cancel the payment if there are errors. Once the budget is rolled over, all the affected payments and cost entries are locked to prevent further changes.

- Budget Rollover:

Budget rollover is used to finalize all the payments, cost entries, charges and balances to the budget envelop for each month. It does the monthly rollover, for example, in Feb 2010, you can do the rollover for Jan 2010.

To make work flexible, you have the option to choose the start month of the rollover, then the system automatically chooses the subsequent rollover month. For example, if you start the rollover in Jan 2010, then the system asks you to run it again in Feb, March, and so on. You are not able to skip a month, for example, to run the rollover in March without having done it in Feb.

Logically, you should start the rollover from the first month of your financial year, and close the budget envelop in the last month of the financial year. For the next year, you will need to create a new budget envelop.

Once the rollover is done, you can write notes for this rollover and click confirm to proceed.
As good practice, you should view the rollover summary for each budget before running the rollover.

- Budget Details & Summary:
6.12 Register a Project

If ACLS has been configured to be project-based, you are required to register a project to enable users to access the system.

To register a project, the following information must be entered.

- Project short title
- Project long 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, researcher #1 is charged $50 per hour for using any instruments. If the project has two accounts #A and #B, and #A contributes 80% of the cost and #B contributes 20%, it means that $40 is billed to account #A and $10 to account #B.

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

Click the link **Click to search projects** ... as shown above to start searching.

For example, type in 'mole' to search any projects related to molecules. To edit the project, you click on **Edit** button to continue.
Operating ACLS

6.13 Search Users

There are 3 ways to search for a user, as follows:

- User Profile Manager
- Search User By Supervisor
- Search New User

Level of access control is detailed in the table below:

<table>
<thead>
<tr>
<th>Level of Access</th>
<th>User Profile Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- User and Supervisor group can only edit their own profile</td>
</tr>
<tr>
<td></td>
<td>- Staff group and lab manager group can search and view user profiles, and issue training certificates</td>
</tr>
<tr>
<td></td>
<td>- Admin group can search, edit, add user profiles, edit user accounts</td>
</tr>
<tr>
<td>Search By Supervisor</td>
<td>- Supervisor group can view a user’s profile under their supervision</td>
</tr>
<tr>
<td></td>
<td>- Staff group and above can access this function</td>
</tr>
<tr>
<td>Search New User</td>
<td>- Staff group and above can access this function</td>
</tr>
</tbody>
</table>

6.13.1 User Profile Manager

ACLS provides user searching by school or organization, account or project, group, training certificates and phone number.
There are two options to display the search results: Short Form (as shown below) and Full Form.

### 6.13.2 Search New User

This function displays the number of new users registered in a specific period. Select the From and To period using the drop-down list.

**6.14 Export User Data**

Through eDM, you are able to export user data to an Excel file which is protected by a strong random password. Go to **User profile**, and click on **Export To Excel** to continue.

First, you need to define your Excel template. Simply select the data field of your choice, and save. A template is specific to a staff member. In other words, if Jane and Mary want to export user data, then they need to set up individual templates. You can change the template each time before exporting the data to suit your needs.
Generating Excel data may take a while depending on the volume of user data. ACLS sets up each Excel file with strong password protection, and you can download them at any time.

Then you are able to access the generated Excel files through:

Password protection of the export EXCEL file is optional. By default, the system enables password protection.

6.15 Broadcast Email Notices

To broadcast an email notice to a group of users, click on Broadcast Messages. Select the user group or training certificate group, enter the message title and content of the message.

Click Send Message to complete the broadcast.
You can also generate a full list of email addresses for the selected group. This function enables you to use any local email client program to send emails with attachments.

- Check the box **Generate the email list of the selected group**
- Click on **Send Messages** to compile the list

The signature is similar to the signature in the email client programs, such as MS Outlook. Once set up, the system attaches it to each message as a signature.

### 6.16 Edit Booking Data and Usage Log Data

#### 6.16.1 Booking Data

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

#### 6.16.2 Usage Log Data

Staff can update incorrect login and logout times, and 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 assist correction.
The system displays the entire log data for a selected date, and this assists you to enter the correct time and avoid any conflicts.

Furthermore, an error fixing mechanism is available to reduce the effort required to correct the logs. However, this tool may not work under certain conditions and further improvement will be made in the future. ONLY the ACLS System Administrator has the authority to delete log records.

6.17 Generate Data Reports

Click on Report Manager to see all the reporting options. These are dependent on system configuration, be booking data, be usage (log) data.

Level of access control is detailed in the table below:

<table>
<thead>
<tr>
<th>Level of Access</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Data Report</td>
<td>- User group can access their own booking data or usage data</td>
</tr>
<tr>
<td></td>
<td>- Supervisor group can access their own and their supervised group’s booking data and usage data</td>
</tr>
<tr>
<td></td>
<td>- Staff group can access all booking data and usage data, plus sum data by facility</td>
</tr>
<tr>
<td></td>
<td>- Lab Manager group can access all booking data and usage data, plus sum data by facility, and sum data by univ, school and org</td>
</tr>
<tr>
<td></td>
<td>- Admin group can access all booking data and usage data, plus sum data by facility, and sum data by univ, school and org, and generate invoice statements per supervisor</td>
</tr>
<tr>
<td>Sample Job Report</td>
<td>- Lab Manager group can access all sample job reports</td>
</tr>
<tr>
<td></td>
<td>- Admin group can access all sample job reports, and generate invoice statements</td>
</tr>
</tbody>
</table>

An automated data reporting tool is available through Batch Report (bDRT). bDRT serves as a plug-in module to ACLS. It runs monthly reports, and you have the option to run the reports overnight or instantly.

Alternatively, manual reporting for individual user, individual facility, individual school/org are available in Report Manager.
There are more reporting tools available:

- Sample report
- Training certificate report
- Commercial booking report
- Group booking report

6.17.1 bDRT

Through bDRT, you are able to run monthly reports overnight or instantly.

- Step 1:

Select Month and Year, then choose if running report overnight or now, and click on Accept.

- Step 2:

If the system detects that a previous report exists, it alerts you for confirmation. If this is the first report, you will see the following page:

That is all you need to do.

Click on Access Batch Data Reports button to access. The system sorts out the report by year index.
Furthermore, the system provides you with sorting options to assist with your reporting needs.

6.17.2 User Report Snapshot

6.17.3 Facility Report Snapshot

6.17.4 School Report Snapshot
6.18 Export Data Report

Through bDRT, you can run monthly data reports with a few clicks. Now you are able to export onscreen reports to password protected Excel files through eDM.

Simply click on “Export to Excel File” button to start the exporting process.

After running, you are prompted to access the file.

6.19 Generate Invoice Statement

Click on Invoice Manager to see all the invoicing options, depending on system configuration, be booking data, be usage (log) data. Each invoice statement is set up per supervisor.

In general, there are two options to run invoicing statements:

- **Manual**: you can manually generate invoice statements related to booking data or usage log data, and also to sample jobs.

- **Batch**: through bDIS, which is similar to using bDRT for reporting, you are able to complete an invoicing job with a few clicks.

Supervisors can access their own invoice statements when they logon to ACLS. Upon supervisor logon, the system does a cross-check against that supervisor to list all the invoices related to Booking Invoice Statement/Usage Invoice Statement, and Sample Service Invoice Statement (if any).
6.19.1 Supervisor Invoice Snapshot: Booking Data

Click on Individual Booking Invoicing to commence. The Supervisor Invoice for booking details each booking or usage session time and generates the total.

A printable copy can be obtained by clicking.
Operating ACLS

Summary of Bookings:

<table>
<thead>
<tr>
<th>Facility</th>
<th>User Name</th>
<th>Accounts</th>
<th>Account Charge/30 Min Booked Hours Charges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flip 300 NMR</td>
<td>Bradley T. W.</td>
<td>3</td>
<td>$75.00</td>
</tr>
<tr>
<td>Flip 300 NMR</td>
<td>Th Di G. Nguyen</td>
<td>33</td>
<td>$225.00</td>
</tr>
<tr>
<td>Flip 300 NMR</td>
<td>Hui Hui Joanne Ho</td>
<td>67</td>
<td>$2175.00</td>
</tr>
<tr>
<td>Sub-Total</td>
<td></td>
<td>123</td>
<td>$3075.00</td>
</tr>
<tr>
<td>Hertz 500 NMR</td>
<td>Bradley T. W.</td>
<td>82</td>
<td>$2090.00</td>
</tr>
<tr>
<td>Hertz 500 NMR</td>
<td>Hui Hui Joanne Ho</td>
<td>95</td>
<td>$2125.00</td>
</tr>
<tr>
<td>Sub-Total</td>
<td></td>
<td>167</td>
<td>$42175.00</td>
</tr>
<tr>
<td>Tesla 600 NMR</td>
<td>Hui Hui Joanne Ho</td>
<td>87</td>
<td>$2175.00</td>
</tr>
<tr>
<td>Sub-Total</td>
<td></td>
<td>87</td>
<td>$22175.00</td>
</tr>
<tr>
<td>Gauss 400 NMR</td>
<td>Bradley T. W.</td>
<td>72</td>
<td>$1800.00</td>
</tr>
<tr>
<td>Gauss 400 NMR</td>
<td>Hui Hui Joanne Ho</td>
<td>16</td>
<td>$400.00</td>
</tr>
<tr>
<td>Sub-Total</td>
<td></td>
<td>88</td>
<td>$2200.00</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>465</td>
<td>$116125.00</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Account</th>
<th>Charges</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNSW-DH-SMCI-1701-3051212</td>
<td>$116125.00</td>
</tr>
</tbody>
</table>

Invoice No: 00000001
6.19.2  Supervisor Invoice Snapshot: Sample Jobs

Click on **Sample Invoicing** to commence.

Select a supervisor and a list of all the completed jobs under this selected supervisor is displayed for further action. The “click-show” information box provides the information for each job.

Now you can select multiple jobs for the same invoice, simply tick the required checkbox and click on **Continue**.

Here is an example of the invoice statement:
SAMPLE JOBS STATEMENT

TO:

TEL:
FAX:
EMAIL:

DATE: October 28, 2009

DETAILS:

This Statement covers the sample jobs completed for your groups.

Details of Jobs:

<table>
<thead>
<tr>
<th>Job No</th>
<th>Customer/User/School/Org</th>
<th>Account</th>
<th>Sample Quantity</th>
<th>Sample Type</th>
<th>Method</th>
<th>Charge</th>
</tr>
</thead>
<tbody>
<tr>
<td>NMR-2009-1</td>
<td>Maude Le Helaye</td>
<td>EXTERNAL</td>
<td>2</td>
<td>ELS</td>
<td>Endoluminal Sciences</td>
<td>$240</td>
</tr>
<tr>
<td>NMR-2009-3</td>
<td>Stephen Davies</td>
<td>EXTERNAL</td>
<td>4</td>
<td>NMI</td>
<td>QNPR 1H NMI</td>
<td>$83.2</td>
</tr>
<tr>
<td>NMR-2009-3</td>
<td>Stephen Davies</td>
<td>EXTERNAL</td>
<td>4</td>
<td>NMI</td>
<td>1H NMI</td>
<td>$83.2</td>
</tr>
<tr>
<td>NMR-2009-3</td>
<td>Stephen Davies</td>
<td>EXTERNAL</td>
<td>4</td>
<td>NMI</td>
<td>1H NMI</td>
<td>$83.2</td>
</tr>
<tr>
<td>NMR-2009-4</td>
<td>Maude Le Helaye</td>
<td>EXTERNAL</td>
<td>4</td>
<td>ELS</td>
<td>Endoluminal Sciences</td>
<td>$480</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Account</th>
<th>Charges</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL120178</td>
<td>$480.00</td>
</tr>
<tr>
<td>ALL116882</td>
<td>$249.60</td>
</tr>
<tr>
<td>UNSWA-CEIC-OP01-PS08455</td>
<td>$240.00</td>
</tr>
</tbody>
</table>

Invoice No: ST000000004
6.19.3 Batch Data Invoice Statement (bDIS)

*bDIS* operates in a similar way to *bDRT*, as illustrated below:

You have the option to run *bDIS* immediately (now) or overnight. Upon completion of running *bDIS*, you receive an email notice. On the right-hand side of the display, there is a short help information box to guide you through.

You can access the invoices through “Access Monthly Invoice Statements”.

Click on “Invoice Statements” to access the month of interest:

You are able to email the invoice statements to the selected supervisors or to all on the list. You can also set it to have a copy sent to yourself.

The system will show you the status of the email on the next page:

6.20 Set Up Trainers and Certificates

To add/edit a trainer and create/edit a certificate, click on *Staff Resources* -> *Training Manager*. 

*AC LAB SYSTEM*
There are two kinds of certificates:
- Certificates per facility
- Certificates per facility group

There are two kinds of trainers:
- Trainers per facility
- Trainers per facility group

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

Group certificates supersede the single facility certificates. And the same rules apply to the trainers.

**6.20.1 Trainer Registration**

A trainer can be removed, or be temporarily suspended.
6.20.2 Certificate Registration

It is good practice to think over the certificate structure before commencing certificate registration. ACLS requires the following certificate parameters to be established.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certificate Title</td>
<td>Add the facility name as part of each certificate title for easy recognition.</td>
</tr>
<tr>
<td>Content</td>
<td>Details of certificate</td>
</tr>
<tr>
<td>Group</td>
<td>Each certificate is linked to the individual group settings to set the booking controls.</td>
</tr>
<tr>
<td>Expiring Period</td>
<td>Counted in months from last user login to the system.</td>
</tr>
<tr>
<td>Onsite Supervision</td>
<td>Only works with ACLS Console</td>
</tr>
<tr>
<td>Certificate Invalid</td>
<td>The date of certificate deactivation.</td>
</tr>
</tbody>
</table>

Alternatively, it is much easier to set up certificates through Certificate/Group Certificate Wizard which is a one-stop process.

6.21 Record User Forms

Through Form Repository Manager, you are able to register the forms. This can centralize the storage of signed procedures, forms and paper electronically to cover:

- Induction
- OHS
- Access
- Subscription

With Form Repository Manager, users and staff can easily track and access the form records generated over years.
Register Forms:

You can upload forms (PDF only) against an individual user, and there are no limits for this.

Furthermore, staff can access forms on the dashboard, and each user can access their own induction documents when they logon to ACLS. In addition, you can search forms by users.

The system provides a means to remove unwanted forms, and restore them if needed.
6.22 Store and Share Documents

ACLS provides a solution to store and catalogue documents for secured access and sharing. Through Document Repository Manager, you are able to register general documents and facility documents. You can perform the following tasks:

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

Click on Register General Documents to register:

- Step 1: select the folder where the document is located, you can upload documents singly or in multiples
  - Select the documents, click on Open to upload.
- You are shown the uploading progress:

- When Upload is completed, you can see the all uploaded file names as below:
- Step 2: Save to registry
  - You must click on Save To Doc Registry to register the document to the system. If you don’t do this, then documents are not considered as Registered. Upon saving, you are prompted and need to click OK:

  ![Message from webpage](image)

  The system returns to the home page of Document Repository Manager and shows you the documents you just uploaded.

  ![Document Repository Manager](image)

  If you go back to My Dashboard and click on Access Documents, you can see the results as illustrated:

  ![Access Documents](image)

  Register facility documents is similar to the process shown above. The only difference is that you must pick a facility first.
The difference between general documents and facility documents is illustrated below.

<table>
<thead>
<tr>
<th></th>
<th>Registered Users</th>
<th>Registered Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Documents</strong></td>
<td>All can access</td>
<td>All can access</td>
</tr>
<tr>
<td><strong>Facility Documents</strong></td>
<td>Users who have a facility training certificate, can access. Those who don’t, cannot access</td>
<td>All can access</td>
</tr>
</tbody>
</table>

To search the documents, simply type in a few letters of the document name or facility name, and you can get results such as below:

If you wish to delete any unwanted files, click on button **Delete Unwanted Documents** to continue. Then take action to delete the documents.
6.23 Track Samples

Track Samples provides the following options:

- Enclosed lab work: Customers/Users submit their samples for analysis and processing
- Commercial Work: you may deal with a submitted sample for test and analysis

Utilising Track Samples enables you to record the process systematically, archive and retrieve the results, and generate billing reports.

Track Samples records information for multiple groups. For example, the laboratory may have a few units or groups completing the sample test and analysis. The Track Samples module can deal with the same sample jobs for different groups.

- Create the groups (System Administrator only).
Each group is required to have a password to prevent other personnel from accessing unauthorized group work.

- Create the sample type.

![Define Sample Type](image1.png)

- Create the method of analysis.

![Define Method](image2.png)

- Each method of analysis is linked to an instrument or a facility and is allocated a charge per sample.
- The status shows whether the sample type or method is in use. The defined sample types or methods cannot be deleted once they have been created.
- You can create new sample types or methods at any stage. Once a sample type or method has been created, you are then able to check the samples and monitor their progress.

### 6.24 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 + Sequential Order No (ICP-2009-7), as shown below.
Select **Accept** to check in the sample. Once you have registered a new job, you will need to allocate each job with a method of analysis. Click **Edit** to add/edit methods, or update the job details.
A job can have multiple methods, but only one sample type. You can set up a discount if needed.

6.25 Process Sample Jobs

Without a processing update, samples or jobs cannot be checked out. ACLS will record the last update time and the staff members who complete the update.

A job must be checked in order to make changes and updates. To process the job, run one method at a time by selecting and updating.

By default, ACLS includes the full quantity when processing. However, you are able to select a smaller number of samples. When processing, ACLS updates the charge per method based on the settings in methods.
Select the Confirm button and ACLS updates the job. The status of the selected method is marked as Processing.

6.26 Check-out Samples

A job can only be checked out when all the related methods are processed or updated. If not, ACLS rejects the check-out request.

After processing the samples, you can check-out the job:
Select the **Check-out** button. ACLS proceeds to final check-out and no additional updates can be made to the checked out job.

### 6.27 Upload Sample Analysis Results

ACLS has the capability to upload and archive reports or documents. All the documents can be archived, stored and backed up on the central server.

ACLS has a limitation for uploading and archiving reports or documents. Only one document type per job can be uploaded. 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.

- Select the **Document Type** using the drop-down list.
- Enter the Download **Link Description**.

The Download **Link Description** is shown as a hyperlink with more descriptions, so that the actual file name is hidden in the link.
• Select **Browse** to locate the report on your local computer.
• Select **Upload** to complete the upload. To verify the upload was successful, select the **HTTP link** in the column Download Link Description.

### 6.28 Access Experiment Data

Provided that you run an FTP service for the registered users to access experiment data, you can set up this FTP in ACLS so that users can retrieve FTP access information and download data through the browser.

Through **Configure System**, you can easily update FTP information as follows:

- Facility FTP Access Directory
- General FTP Access Directory:

Click on **Access Data** on **My Dashboard** to access experimental data.

### 6.29 Send Emergency Notices

With **Action Manager** and **ACLS Logon Console** installed onto the facility computer, you are able to send an emergency notification to each facility when urgent attention is required.

**“Notification To Facility” (NTF)** (which works with **ACLS Logon Console**) is ready for use. Through NTF, you can send a notice directly to the facility computer, and your notice will reach the facility computer in less than 10 seconds.

You have 3 options to deliver your notice to facility computers:
6.30 Set Up Event & Holiday Calendar

Lab calendar is a handy tool to indicate public holidays and special lab events. The public holidays can be shown on the calendar and lab events can be shown through My Dashboard.

Go to System Settings, click Event & Holiday Calendar to set up event calendar. You can set up events and holidays for the current year, last year and next year.
The calendar is shown on the dashboard by default upon login. However, you can turn it off if you wish to.

If the calendar is set up with more contents, click on ‘details…’ to see the popup screen like a feature page.
Furthermore, you are able to enable or disable any facility booking for a defined period of time. For example, if you need to shutdown any facilities due to special events or holidays, you can set this up through Lab Calendar.

System displays the status of action, close all facility for booking, or just close for the selected.

In the following example, only one facility is selected to be shut off from booking.
Set up public holiday:

ACLS can watermark public holidays on the calendar. This is handy to indicate to users the dates of public holidays.

![Calendar with public holidays listed]

You must tick the checkbox in the column of the public holiday when setting up a public holiday.

![Setup calendar 2014 with public holiday marker]

Being marked a public holiday does not prevent users booking events on the day. You must take action to close bookings for chosen facilities.

Once a public holiday is set, go to booking calendar, and you can see the watermarked public holiday on the calendar, for example, Christmas Day.
6.31 Training & Support

On My Dashboard, users are able to submit training & support requests, and track down the status of those requests, and the responses made by staff.

There are 5 functions to process these requests. Users can only access 3 out of 5 as follows:
- New Request
- My Requests
- Search Solutions

Staff can access all 5.

**New Request:**

Two types of requests can be selected by users: training request and support request. In the current version, there is no difference in the handling of the different types of requests. However, in future versions, we’ll improve this feature, including analysis reports to improve the quality of service by your organization.

**My Requests:**

The system shows you open requests vs total requests. For example as below, 2 requests are still open of 3 requests submitted in total.
Similar to the web mail design, the system provides an HTTP kind of link to each request for further actions.

Clicking on the link directs you to the next reply page:

**Example #1:**

*Request Ticket Number: 2 (Training Request)*

**Reply Request**

22/06/2012 14:31
Dong Ming Zheng

**Subject:** Need an assistance to train for EMU facility, not sure what to do now

**Example #2:**

*Request Ticket Number: 3 (Training Request)*

22/06/2012 21:13
Paul Munroe

**Subject:** Need training for TEM
done
22/06/2012 21:00
Dong Ming Zheng

**Subject:** Need training for TEM
test
22/06/2012 12:21
Dong Ming Zheng

**Subject:** Need training for TEM

Hi
I am new users.  

Thanka.

Different colours apply to differentiate the users’ requests and staff responses. Yellow refers to users’ requests, and blue to staff responses.

**Open Requests:**

This staff-only function allows staff to respond to the users’ requests.

**Search Requests:**

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

This offers a platform for users to search the previous responses and solutions provided by the staff. Over a period of time, everyone can benefit from the accumulation of solutions and knowledge.

6.32 Conduct Survey

iSurvey (plug-in module) covers 3 processes to build, publish and analyze a multiple choice survey with any content and at any time.

6.32.1 Build Survey

Click on Build Survey under the menu of Survey Creator to create or edit a survey.

- Create new survey:

  Similar to account and facility setup, there are two operations available: edit the existing, or add a new survey.
Survey parameters are described in the table below:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey Title</td>
<td>Title is used as survey access link, it is good practice to keep it short and easy to understand.</td>
</tr>
<tr>
<td>Survey Body</td>
<td>Body is used as the first paragraph of the survey. Normally, the body should describe the purpose or objectives of the survey, and other survey information.</td>
</tr>
<tr>
<td>Start of Survey</td>
<td>Start date of survey available to users. System automatically activates the survey on the start date.</td>
</tr>
<tr>
<td>End of Survey</td>
<td>End date of survey available to users. System automatically ends the survey on the end date.</td>
</tr>
<tr>
<td>Survey Type</td>
<td>Anonymous or compulsory. If set to compulsory, user must complete the survey upon login before accessing any other functions of ACLS.</td>
</tr>
<tr>
<td>Access Survey</td>
<td>There are two choices: either run the survey on the ACLS Login Page, or run it on dashboard upon user login.</td>
</tr>
<tr>
<td>Access ONLY Through Direct Link</td>
<td>This setting is for you to set up a non-targeted or targeted survey, and only applies to the ‘Access Survey’ setting on the Login Page.</td>
</tr>
<tr>
<td></td>
<td>If set to ‘Enabled’, then the survey won’t show up on the Login Page, but you can email the survey access URL to the targeted users.</td>
</tr>
<tr>
<td></td>
<td>If set to ‘Disabled’, then survey access is shown on the Login Page, anyone who sees the Login Page can respond to the survey.</td>
</tr>
</tbody>
</table>
Operating ACLS

• Choose targeted users:
  Only compulsory surveys can have this option. Two compulsory methods are available: upon login or on My Dashboard page. The system disables the survey to any user who has done the survey.

  ![Step 2: Choose Targeted Users](image1)

• Upload survey questions:
  Survey questions can only be added to the system through uploading a text file.

  ![Step 3: Upload Survey Questions](image2)

By doing so, you only need to maintain one copy of the question file. You are able to update the questions at any time until the questions are published. It is good practice not to add new questions to the survey after publishing it to the users.

• Upload survey multiple choices:
  Similarly, survey answer choices can only be added to the system through uploading a text file. You are able to run the survey with the same multiple choice answers for each question, or separate answers for each question.
The contents of the multiple choice file shall follow the template as given below.

q1
answer 11
answer 12
answer 13
answer 14

q2
answer 21
answer 22
answer 23
answer 24
answer 25

q3
answer 31
answer 32

q4
answer 41

q1 refers for 'question 1' in the survey, q2 for 'question 2', and etc. The system detects ‘q1’ as a key word for the multiple choice answers of question 1, it scans and saves the multiple choice answers for question 1 in the survey form.

- Preview survey:

You are able to preview the survey any time to confirm it is correct before publishing.
Congratulations, the survey is ready for publishing!

6.32.2 Publish Survey (Accessible to Admin Only)

To make the survey available to users, you must publish it. The system permits a maximum of 4 surveys to be published concurrently.

When clicking on each survey, you are shown the survey details, including the external access link.
6.32.3 Analyze Survey

There are 3 options to conduct survey analysis:

- Analyze Survey (Accessible to staff and admin)
- Search/Compare Survey (Accessible to admin only)
- Compare Response Rate (Accessible to admin only)

Analyze Survey does individual survey analysis, and presents the survey results in a graphic chart, or tablet format. The default is Bar Chart.

**Bar chart:**

**Pie chart:**
Donut chart:

Table chart:

It is useful to know what the response rate is to the survey. The system compares the response of the active registered users.
• Compare Response Rate (Accessible to admin only)

As long as the survey response rate is saved or locked, you can select it from the survey matrix and compare.

It is very useful to compare the response rate across different surveys.

• Search/Compare Survey (Accessible to admin only)

Sometimes, you may wish to compare the questions from different surveys. So the system provides a search and compare tool for this. It can be interesting to compare the same question in separate surveys. For example, you conduct a survey this year to this year’s users, and then may conduct the same survey the next year to that year’s users.

Comparing the results, you can easily identify if there are any variations for decision making and other purposes.
6.33 Sending Mobile Message (SMS)

ACLS works with Redcoal mobile messaging service provider to send out a short SMS to mobiles. The techniques used for this are Redcoal MIDA and SOAP.

- For System Administrator

You need to turn on Data Execution Prevention (DEP) in Windows to permit SOAP operation.

Follow the steps below to turn on DEP for Email Server of ACLS on the server:

- Click **Start**, click **Run**, type `sysdm.cpl`, and then click **OK**.
- On the **Advanced** tab, under Performance, click **Settings**.

- On the Data Execution Prevention tab, use one of the following procedures: Click **Turn on DEP for all programs and services except those I select** to select the **OptOut** policy, and then click **Add** to add the programs that you do not want to use the DEP feature. In this case, it is **Email Server** in `c:\program files\AC Lab System\Email Server\`. 
- Click **OK** twice.

After turning on DEP, you start Email Server program as normal. Please refer to Microsoft document for DEP details at http://support.microsoft.com/kb/875352.

- Set up SMS License

To enable the SMS, you need to contact Redcoal for the following license:

- MIDA license: this is a license for MIDA interfacing to Redcoal service. This has a one-off charge of about $700.
- Messaging credits: there are some packages on the Redcoal website, the cost is about 20c/message.

After obtaining a license and purchasing credits, you can set up SMS in ACLS.
Click on **Redcoal Messaging Connector** to enter the following parameters:

- **SMS Serial No**: generated by Redcoal serial generator. You can download this from the Redcoal website, or it is provided in ACLS upgrading kits.
- **SMS Key**: License key provided by Redcoal
- **SMS Originator**: the sender name displayed on mobile

Once these 3 parameters are ready, you can use any mobile for testing:

If test is successful, then you can set up a staff mobile phone book. If not, you are prompted with an error code (Error code definitions can be found at Redcoal MIDA guide). Please contact us if you can’t resolve the errors.
- Broadcast SMS to Staff

Go to **Broadcast Messages**, as long as a staff mobile list is set up, you can easily send any SMS to any staff.

![Broadcast SMS](image)

**6.34 Mobile Access**

Through the browser of the mobile, type in the URL of the ACLS you wish to access. The first page is the login page.

Upon login, the certified facility list is ready for selection.

![Mobile Access](image)
**My Bookings:** showing your own bookings from now to the future.
**Operating ACLS**

*Desktop Version:* clicking on the link to switch you to the desktop version (full ACLS version).

*About ACLS:* showing ACLS version.

*Make Bookings:* clicking on the facility you want to make and view bookings.

### 6.35 Form Virtual Hub

Currently, ACLS is provided to schedule facilities and manage lab operations in individual labs, units, and institutes. Each ACLS requires a separate login to access, and each ACLS runs itself without interaction with the others. With the ACLS trust nodes mechanism, multiple ACLS nodes can form a kind of virtual hub to gain a “single login” access, global connections and information sharing among the ACLS nodes.
In the above diagram, if you access ACLS EMU, you are able to move to ACLS NMR without needing a separate login.

The steps to form a virtual hub are outlined as follows:

**Step 1: Acquire the unique token of your ACLS**

Go to *System Settings -> Trust Nodes*, click on *Access Trust Token* to get your ACLS token needed to connect between trust nodes.

In the demo example, the token is shown as below:

Your ACLS token needs to be provided to the other ACLS nodes for trust node connection. If you reset the token, then the trust node connection is cut off unless your ACLS counterparts update the corresponding token in their ACLS.

The token serves as the ID of the ACLS node.
Step 2: Set up trust ACLS node

You need to get the token from the other ACLS nodes with which you wish to form a virtual or global connection with your ACLS. ACLS uses the token to identify the ACLS nodes.

Click on “Add” to create a trusted ACLS node.

The setting parameters are detailed as follows:

- **Node name**: a short name to identify the trust ACLS node for global connection
- **URL**: the URL of the trust ACLS node
- **Token**: the trust ACLS node token, which is provided by the trust ACLS node owner
- **Status**: if unchecked, then the connection to the trust ACLS node is disabled

Upon saving, the trust ACLS node appears under “Access Hub Nodes”.
Step 3: Trust ACLS node set up

For the trust ACLS node (counterpart), you need to repeat step 1 and step 2 so the two ACLS can connect with each other trustfully.

Step 4: Test of ACLS trust node connection

In the above example, if you click on “MWAC EMU”, the system starts to link to the trust ACLS node “MWAC EMU”. For the very first time access, the user needs to login so the trust ACLS can synchronise the token and ID with your ACLS. After that, the user can switch from one ACLS to the other without needing a separate login.
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 on Login Page.

![Access Denied]

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 Logout button as shown below.

![Logout]

7.2 Online Registration

3. 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.

![Login]
4. 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.

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

ACLS uses the Contact Us address. The Contact Us email is located 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.

6. How do we set up a facility of interest in the online registration process?

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

As long as the system detects you have set up a facility list for online registration, it automatically adds a facility page to the registration process.

7. 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.

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

4 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 format registration.

7.3 Book Facilities

9. I have 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.

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

You are able to see your own booking limitations through the booking calendar page.
11. Can I book a facility for a service and make it known to users?

Service Booking tool 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 facility.

12. I need to cancel a booking and make it available, as the user who booked the session cannot attend. What should I do?

First step: cancel the user booking through service booking;

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

13. Why can’t I find a facility in the drop-down list to make bookings?

You need to have been issued with a training certificate to be able to make bookings with a facility. By clicking on Training Records, you can check your records and also find the trainers for the particular facility.

14. Why can users make bookings for a facility even without training certificates?

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

15. How do I know if my booking is successful?

When a booking is successful, a pop-up message box appears to confirm the booking is successful.

If you try to book more than permitted, a pop-up message box appears to remind you.
16. 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.

17. 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.

18. 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.

19. 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.

20. 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.

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

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

22. 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 Print button to generate PDF format of calendar.
23. **If we have many facilities for booking, can we display them in their facility groups?**

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

24. **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.

Generally speaking, 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 facilities. 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 facilities outside their own unit.

25. **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 in **Group Manager**. This depends on which user group you set to each user, as each group links to the training certificates.

For example, if you issue a beginner certificate for equipment #1 to James, this certificate connects James to the beginner group for equipment #1.

If the advance days/period for booking equipment #1 is set at 10 days, then James can see the advance booking calendar for the next 10 days.
26. 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 Group Manager, and nothing to do with each facility.

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

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

Yes, you can do this through User Booking tool.

28. 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 Booking Function Access Control.

Check the functions you wish to make available to staff and users.

29. What is the benefit of selecting week view?

This is up to your preference to the calendar. On week view, you can see clearly the available time slots and less number of events than on the calendar page.

30. Why does the system provide two views for calendar as month-view does include week-view?

Due to the browser limitation, if the month calendar is over-crowded, the ‘Save Changes’ on month calendar won’t work properly. The solution is to reduce the number of events to a shorter period. Week view calendar is a solution to the ‘Save Changes’ issue caused by the over-crowded month calendar.
31. 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.

32. 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.

33. 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.

34. What is iCal?

iCalendar (iCal) is a computer file format which 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.

35. How do I turn off the compulsory booking confirmation for a facility?

By default, the system switches on booking confirmation to all facilities, so that users and staff receive the booking confirmation with the attached iCal files.

However, you can switch off the compulsory booking confirmation. Go to Facility Manager and simply uncheck the box Compulsory Booking Confirmation.
36. I can open and save the iCal files to Outlook, but how can I share this with a web calendar such as Gmail?

You have to import the iCal file to the web calendar.

37. I cannot see the booking calendar when accessing Facility Booking, why?

Most likely, this is caused by the browser's history and cache. Vista 1.8.0 has been tested and proven to work on IE8/IE9, Firefox, Chrome and Safari, and may not work properly on IE10 (more tests need to be done on IE10).

Due to the CSS and HTML changes, you must clear the history and cache of the browser if you don’t see the new calendar properly.

On IE and Chrome, you can force refresh the page by pressing Ctrl Key + Click on Refresh Icon for IE or Chrome; and for Firefox, pressing Ctrl Key + F5 key.

**Internet Explorer:**
- Must switch off ‘Compatibility View’ on IE
- Clear all
Frequently Asked Questions

**Firefox:**
- Clear all

**Safari:**
- Reset all
40. Why does it take two steps to save the booking changes?

Due to the booking period restriction, users cannot book any days into the future. However, a user can create a multiple day booking event on the calendar by holding the mouse key and dragging across to create a multiple day booking event.

39. Can I set week view as my default calendar view instead of month view?

Yes, go to Calendar Settings to make the change.

38. Why are standard users not able to select dates in the popup booking page?

Due to the booking period restriction, users cannot book any days into the future. However, a user can create a multiple day booking event on the calendar by holding the mouse key and dragging across to create a multiple day booking event.
41. 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 has blocked until 5pm. However, you can allow current hour booking permission by changing the parameter “EnableCurrentHourBookingChange” through System Settings -> Configure System.

42. Can I set different booking time intervals for different facilities, for example, instrument A for with one hour, instrument B for 15 minutes?

Yes, through Facility Manager, you can set a minimum booking unit for each facility.

43. What is the difference between Booking Calendar and Data Logbook Manager?

Booking Calendar is used to make bookings in the future, while Data Logbook Manager handles bookings in the past.

44. For User Booking tool, it seems that the maximum hours booked for a user can exceed their group time allocation?

There is no control over user booking limit. Therefore, staff can increase user bookings if there is a need. You can switch this off if you don’t want it open to staff.
45. How can I make a service booking in a past time?

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.

46. Can I change an “approved” booking to “unapproved”?

No.

47. 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.

7.4 Group Training Booking

48. Is an email notice automatically sent to the users who are booked for?

Yes.

49. Can Group Training Bookings be cancelled?

Yes, however, you can only cancel a group training booking made by yourself. If you want to cancel a group training booking made by other staff, please do so through Service Booking.

50. Are Group Training Bookings included in reports?

No. A separate group booking report function is added. Hence, group training bookings won’t be part of reports or invoices. In the current design, group training bookings are treated as special bookings. You have to manually integrate group booking data into a report if needed.
7.5 Update User Information

51. How can I change my login name and password?

You cannot change your login name once your registration is complete. However, you are able to update your password. When you login, click User Profile → User Profile Manager and click Set New Password to continue.

If you are the administrator of the system, then you are able to reset any user's password. The new password is sent to the user by the system after each change.

Click on Set New Password, and the system will automatically generate a random password for the user. However, if LDAP is ON for that user, then password setting through ACLS is turned off automatically. In other words, the local password for a user is no longer in use when LDAP is effective.

52. How can I update my information, such as change of contact details?

Login and click User Profile Manager to update your profile information.

53. I cannot find a particular user using the search function. Why?

Users are separated into two categories: active and inactive.

When searching, you have to select the search range. The default is the range of active users.

54. Why is user access disabled on the day following reactivation?

This happens if UserPhotoAvailabilityCheck is turned on. The system applies a daily check against active user photo availability. If the photo 'non-existing period' is longer than the days set out in Configure System parameter DeactivateIfNoPicturePeriod settings, then that user's access to the system is deactivated automatically. However, this does not apply to System Administrators.
55. Is it possible to restrict certain user access?
   Yes, uncheck the box activate user entry through User Profile Manager.

56. Why can’t we see ‘Export To Excel’ in the dropdown menu of User Profile?
   ACLS checks against the signature excel file before giving you permission. Simply, run EDM test to resolve this. Please refer to Appendix G for detailed information on how to create an Excel signature file.

57. Can all staff access ‘Export To Excel’?
   No, this is only available to admin staff.

58. Which MS Office versions are certified with EDM?
   EDM only works with MS Office 2007 or MS Office 2010. Earlier versions are NOT supported.

7.6 Update User Supervisors

59. How can I set up supervisors for a user?
   There are two separate processes to register supervisors for a user:
   
   - For new registration or first approval of new registration, you set up a supervisor from the dropdown list.
   - For existing users, you can add multiple supervisors through Edit User’s Supervisors shown below.

   Click on the button and you can add multiple supervisors, but you can only set one of them as the ‘default for invoicing’ supervisor.

60. What do you mean ‘default for invoicing’?
   You are able to compile invoice statements through ACLS. Each invoice statement is raised against a supervisor who is the ‘default for invoicing’ supervisor.
61. **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.

62. **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.

63. **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.

### 7.7 Data Report and Invoice

64. **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.

65. **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.

66. **What happens after sample jobs are taken for invoicing?**

   Those jobs are considered to be invoiced and closed. They are not available for further editing.

67. **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**.

### 7.8 Batch Data Report

68. **What are the benefits of using bDRT?**

   **bDRT** runs all booking reports and usage reports at the one time. Without **bDRT**, you would need to run reports one by one for each facility, or each school or organization. **bDRT** improves reporting productivity by at least a factor of 10.
Furthermore, bDRT runs report-like transactions. In other words, through bDRT, 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 bDRT again with the new pricing settings.

In future ACLS versions, reports through bDRT can be polled by HQ (Headquarters) Report Polling, and this will bring ACLS reporting level up to an enterprise system.

69. What are the differences between bDRT and Booking/Usage Data Report function?

As explained above, bDRT runs all booking reports and usage reports at the one time, and bDRT 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, bDRT will provide you with an entire history of all a facility’s running reports.

70. 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 console logs for reporting and billing, bDRT produces two kinds of reports so that you can compare them against each other: booking vs usage.

71. How can we access the generated reports?

Go to Report Manager -> 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.
72. What do we need to prepare before running bDRT?

It is good practice to check booking and usage data integrity before running bDRT each month, to make sure the booking data and usage logs are correct. In particular, 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.

73. How can we export the reports?

You can easily export a report to an external Excel file. First, you need to go to Batch Report, continue as detailed at Chapter 6.11.

74. What happens when the system is running bDRT in the background?

During the short period of time that bDRT is running, the system shuts down the web login so that all the required data and system resources can be fully accessed to complete the process.

If you try to access ACLS during this process, the system will alert users with following message:

When the process is complete, the system web login resumes normal operation.
75. How can I access the EXCEL files generated previously?

Click on Report Manager -> Excel Reports to access, then click each link to expand for details.

76. What if I export the data report more than once on the same day?

If you export the same monthly report on the same day, then the previous report will be overwritten. However, if you do so on a different day, then you will have multiple copies of the same monthly report. This can be used to track the changes of data in some cases.

77. Can I export in my template?

Not able to do this yet. If you wish to, please contact us to discuss further.

78. Can the invoice statements be PDF instead of HTM?

Not able to do this yet. A PDF converter will be introduced to ACLS in the future.

79. How can I search for the invoice statements I want?

A new search tool is provided through Invoice Manager -> Find Invoice. Simply enter part of a supervisor’s name or invoice number, and the system shows the search results for you.

80. What if I change the data and need to redo the invoices?

You just need to re-run bDIS. The system only keeps one valid invoice statement for each supervisor per month.

81. What if I want to change the format of an invoice statement?

Please contact us to discuss this further.

7.9 Manage Account Budget

82. How does Budget Manager deal with tax?

ACLS is not a certified finance system, so no tax is dealt with. If necessary, you will need to enter payments and costs after tax. For example, if you receive $200 + Tax, what you need to do is to register this payment as $200.
83. What if I correct errors in the booking or usage data after doing a rollover?

Once you have done a rollover, the system has no way to roll back. To fix this, you need to create either a payment or a cost to offset the error in the balance.

84. What happens to the budget envelop after rollover?

Once you have finished a rollover, you can only make minor changes to the budget, such as expiry date, rollover enable, email alert enable and days to deactivate account.

85. What is the implication of payment or cost entry date?

The system runs a rollover each month, so the payment or cost entry date is used to decide whether the payment or cost entry will be taken for rollover. For example, if you set the entry date to Feb 2010, then this payment only takes effect for the Feb rollover.

86. Can all budget rollovers be done at the one time?

The current version only offers manual rollovers.

87. Do we have to use the budget manager? Why budget manager?

Budget Manager is designed to assist you in managing account cashflow and balance. You don’t have to use this option.

The benefits of budget manager are obvious even if you don’t want to do a rollover each month.

- Case #1:
  You can use budget manager to do bookkeeping only, recording all the payments and costs.

- Case #2:
  If you want to know what total charges over a year or a period of time relate to a chosen account, or to a particular user group; even if you don’t want to trigger the user to make an advance payment to top up the account balance.

88. Can an expired budget envelop be reactivated?

Yes, you can reactivate budget envelops that have expired within the last 3 months.

7.10 User Training & Certification

89. 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 information page. Select Edit User’s Certificates.
A trainer can only issue a certificate to the facility for which he/she is certified as a trainer.

90. Why can’t I find the trainer from the drop-down list in Training Manager?

Only staff members (minimum level of general staff group) can be granted trainer access.

91. Who has authority to set up trainers and certificates?

The System Administrator, administrative staff and lab managers can edit and add trainers and certificates.

92. How do I know I am the trainer for certain facilities?

There are two places you can check for this:

- **My Dashboard**
- Go to your profile through User Profile Manager, the system shows you what facilities you are listed as a trainer.

93. 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 of time.
94. 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 instruments can be set up for trainer and certificate. Go to Facility Manager -> Booking Facility Chart.

95. I want to give a facility 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 facility. Go to Staff Resources -> Training Manager to set up trainer.

7.11 Register Forms and Documents

96. 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.

97. 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 My Dashboard, and each user can access their own forms and documents when they logon to ACLS.

98. What if I want to restore removed forms?

Click on Deleted FormRecords to restore. However, you can only restore the forms that have been removed within the last year.

99. 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.

100. What documents should I upload as general documents?

Examples of documents for general access are lab operation policy, safety work requirements, induction procedures, etc.

101. What should I upload as facility documents?

Facility documents are categorized per facility. Examples of documents for facility access are instrument operation guide, tutorial materials, etc.
102. Should I upload facility maintenance contracts, or service agreements as facility documents?

No, you should not. ‘Facility Contract Depository’ will be provided in the future.

103. What is the maximum file size for upload?

The maximum size is 20MB per file.

104. 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.

105. What is the difference between documents and forms?

There are two categories of documents: general and facility. But the forms are registered to each user.

7.12 Track Training & Support Requests

106. 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.

107. 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 Manager to set this up. When staff respond to the request, the system also sends a short notice to the user who submitted the request.

7.13 Track Samples

108. What if I have added the wrong method to the sample job?

You are able to delete the method from the job as long as the method is checked-in.

109. 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 sort option.
110. What is the size limit for uploading?

It is 10MB. For larger files, the use of FTP is recommended. Contact the ACLS System Administrator.

111. What kind of files can I upload?

ACLS supports the following file formats when uploading:

- xls (Excel 2003)
-xlsx (Excel 2007)
- doc (Word 2007)
- docx (Word 2007)
- pdf
- zip

112. How do I edit jobs with the same job number?

ACLS comes with an Auto-Correct Job No tool. By running this tool, all the incorrect jobs are restored with their correct job number.

113. 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.
114. How can a customer or user download results through the system?

Click **Access Invoices** on **My Dashboard** to the download page. ACLS verifies the user details and displays the records and the download links according to the year index.

7.14 ACLS Logon Client Console

115. What if there is no communication between the console and the ACLS server?

A loss of communication between the console and the ACLS server could be caused by a number of reasons:

- Loss of network
- ACLS server down
- ACLS server rejecting console request due to the incorrect server IP configuration
- Network Firewall
- Wrong server IP setting in console configuration file

The console has a built-in feature that detects connection with the ACLS server at all times. If connection fails, the console activates a program zone to allow users to continue operation, and also turns on ‘Control Panel’ to allow staff access by using the System Password.

116. Where do I look for the Console Control Panel Password?

Only Staff can access the System Password. The password is generated by the system automatically, and resets every 6 months automatically. Simply logon to ACLS Web, on **My Dashboard**, click on **Logon Console Password**. You can save this password elsewhere, such as in your mobile.

117. Why does the console open the ‘Staff Authentication Page’ on user login?

If you set the training certificate of the facility 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.

118. Why does the error message “I/O 103” pop up on the console?

The console needs to run on the administrator account as it needs to take over control from Windows. So, you need to set the operating Windows logon account as administrator account. Please contact us if you need help to run the
Frequently Asked Questions

console on a non-administrator account. By doing this, the console stops controlling Windows, such as taskbar, toolbar, start button, task manager, control panel; and, you sacrifice the security of access control of equipment and facilities.

119. Are there any local log files for the console so that we are able to track the operation in case of network loss?

Yes, you can go to `c:\program files\acls logon client\logs` to retrieve the logs. A log is created each day and updated every 5 minutes. For example, a user logs in and fails to logout properly due to network loss, then the log file provides the user login/logout information as backup.

7.15 Access Experiment Data

120. How can we integrate our FTP service with ACLS?

Data storage and access is a complex subject. Please contact us for more details.

121. How can users access data through ACLS?

Through Access Data on My Dashboard, users can retrieve FTP access information, or use the provided FTP link to access data through Internet browsers.

122. Is FTP secure?

FTP is a kind of non-encrypted data service, so it is not secure. However, FTP offers a handy tool to users to access non-classified experiment data and reports. Secure FTP (ftps) will be integrated into ACLS in the future.

7.16 LDAP

123. Where can I find LDAP implementation information?

Please refer to Appendix F for detailed information regarding LDAP implementation.

124. What if LDAP stops working?

The System Administrator should maintain a local access login so that they can logon to ACLS when LDAP is not working, for example, if the LDAP server is down, or the network is not working, etc. Then, when LDAP is not working, they can logon to ACLS and run an LDAP connection test to confirm.

125. What if I run the pre-configured LDAP to turn LDAP on to everyone?

The system turns on LDAP to all users and staff except for admin staff and the System Administrator. If you wish to turn this on to admin staff and the administrator, then you have to edit individual profiles to do so. However, we strongly recommended that you DO NOT turn LDAP on to the System.
After creating a survey, is it automatically available to users to respond?

No, you need to publish the survey. However, without setting up questions and multiple answer choices, you are not able to publish.

What is the question format for the question text file?

When you set up a text file for questions, every question needs to stay on the same line. A separate paragraph of a question is treated as a separate question. When you upload and scan to the survey form, the system shows you how the...
Frequently Asked Questions

question will look. If the questions are not scanned in properly, you can edit the text file and re-load and re-scan.

131. What is the external access link to a survey?
You can email the link to all the users to notify them to respond the survey. Users can just click on the link to continue.

132. What does it look like if the survey is published to the Login Page?
Depending on the number of surveys, the snapshot below shows one survey at Login Page.

133. What does it look like if the survey is published to the Dashboard Page?
Depending on the number of surveys, the snapshot below shows 3 surveys on the Dashboard Page.

134. What is the total locked active users?
You can review a survey before it has finished but first you must save the response rate to lock the current status of the survey because the user number is growing all the time. Without locking, you cannot compare the response rate with that of other surveys. Reset to unlock.
7.19 Virtual Hub

135. Why is ACLS trust node access not working?

Most likely, you have not established the bi-direction trust relationship. It is essential to establish the trust relationship between nodes. In other words, both ACLS needs to set up the trust token first.

136. Does the hub access work if I only register at one ACLS node but not the others?

No. As mentioned earlier, for the very first time, you have to login to synchronize the access. So you must be a registered user of both the ACLS nodes.

137. What are the benefits of forming a virtual hub?

- Single login: a user is able to login to one ACLS and move to another ACLS without the need of second login. For example, user James Cook registers to EMU ACLS at UNSW and NMR ACLS at Sydney Univ, upon login to EMU ACLS, he can switch to NMR ACLS without the need of separate login, and vice versa.

- Virtual hub: any ACLS can link to any other ACLS to form a virtual hub. Global connection is ready.

- Sharing information: this opens up a huge potential to share many aspects of ACLS information, facility, expertise, knowledge etc, among the hub ACLS nodes.

138. What labs may consider the virtual hub solution?

Labs on the same campus, or in the same organization, or any ACLS nodes that wish to form a virtual hub to share information and system access.

139. What information can be shared among trust nodes?

Currently, no information can be shared yet. In the near future, the first step is to implement global facility locator to share facility related information.

7.20 General

140. 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
141. 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.

142. Can I set up a facility group without assigning any facilities?

Yes, you can. ACLS checks the availability of facilities in each facility group when listing the available facility groups for action.

143. Can I delete a facility group?

No. You need to un-link the facility from the facility group, in other words, set it as non-bookable.

144. What if I cannot find the staff to nominate the ownership of a facility group?

Staff who are granted equipment supervisor category or above can be nominated as owners.

145. What is the difference between facility group owners and trainers?

Owners can set up trainers. To issue the 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.

146. Can the owner set himself as the trainer?

Yes.

147. What if my facility log time is incorrect?

Please contact the relevant ACLS support staff member for further action. Please refer to Chapter 6.16 Edit Booking Data and Usage Log Data.

148. What happens if I set the facility to ‘inactive’ through ‘Facility Manager’?

Only active facilities can have training requirements regardless of whether they are booking enabled or disabled. Furthermore, in the coming Incident Reporting, users can report incidents to active facilities.

149. What is the explanation for Bookable and Operation Status listed in facility 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.
150. 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. So 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, i.e. 3 hours x 7 hours.

151. What if my user code or account code is duplicated?

Please contact the ACLS System Administrator immediately for technical assistance as this is most likely to have been caused by a corrupted data index in the database.

152. I cannot find users in the drop-down list, why?

If a user has not accessed ACLS for a period of time, ACLS deactivates the user based on the settings in Configure System. Please search for the user to check their access status.

153. How can I replace the system banner, invoice logo, and terms and conditions for online registration?

Please refer to Chapter 5.4 Upload System Files for details.

154. How do I check ACLS web logon access information?

Go to Configure System, click on Access Records button to check the last 20 access records. The access record information is displayed as below:
You can delete all the access records by selecting **Empty All Records**. The system clears the records when they reach 10,000 records.

155. **How does the announcement scrolling text work?**

Go to **System Settings -> Announcement Scrolling Text**, enter the message. Please note that messages must be completed within 1 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:

156. **How does the announcement popup work?**

Like the scrolling text setup, when it is set up correctly, an announcement popup message window shows up when a user logs in.
157. What is the maintenance record used for?

Go to **Configure System** and click on **Maintenance Records**. The maintenance records verify the total number of records.

Record information is displayed.

If the total records reach 200,000 in one table, please contact the ACLS System Administrator.

158. What should I do if I see the following error message on the screen when I login to ACLS via the web?

This is an alert message to the System Administrator only. ACLS is comprised of two individual auxiliary programs: logonserver and emailserver. They are designed to synchronize with the ACLS web system all the time. So the error message alerts you to check whether the two programs are running normally on the ACLS server.
The synchronization happens every 5 minutes. However, if the problem persists, please contact us for advice.

159. 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
- Facility Manager: Only one default facility
- Group Manager: Only four default groups
- School/Org Manager: Only one default school
- Facility Login: Only one default for example

160. We have ACLS configured for booking only. Why do we need logon console installed over the facilities or instruments?

The ACLS client login program provides a further safeguard for the operation of instruments. For example, without training certificates, users cannot access the instrument.

Please refer to online demo of ACLS login program at:

161. Why do we need to set up different receivers?

This is useful if the staff member in charge is away for a period of time, 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 a single one.

Go to System Setting -> Email Receiver to set up.

162. How can we correct incorrect usage 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 facility 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 of time (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.
163. How can we customize the online help?

By default, online help points to the ACLS site. However, you can customize this to your local help or information document to provide users with your local lab policy and information. Please refer to Chapter 5.7 Link and Directory Manager.

164. 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 HomePageLink 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.

165. 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 receivers’ name and email address, senders’ name and email address, subject and facility.

166. Do I have to manually type events and holidays into the calendar each year?

Not necessary. You can click on Copy All to Next Year 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.

167. What are the differences between Copy All to Next Year button and Copy All Public Holiday Days to Next Year?

Copy All to Next Year only copies the non-public holiday events to next year. Copy All Public Holiday Days to Next Year copies all public holidays to next year. By doing so, it saves time by not having to re-create public holidays year by year, simply copy over.

168. 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 ContactUsEmail to the new email address.
169. **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 (staff CAN NOT) can set up a training certificate and trainer to the facility he is listed as trainer for. In other words, the equipment supervisors can manage their own facilities training set up without the need to disturb the admin.*
8 Future Development

8.1 Standard Packages

The following are some of the new features planned for future implementation. The priority and contents of such implementations are subject to change and depend on demand and available resources. The ultimate objective is to connect the ACLS nodes to form a virtual facility hub for:

- Sharing: facility, knowledge, expertise, solutions, reports and data
- Connection: secured access, live connection with individuals or groups

In 2015, the first priority is to complete PostgreSQL database engine migration.

<table>
<thead>
<tr>
<th>New Features</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACLS Logon Console</td>
<td>Console program will be improved with new functions:</td>
</tr>
<tr>
<td></td>
<td>- Home drive connection: experiment data store to home drive provided at organization level</td>
</tr>
<tr>
<td></td>
<td>- Incident report</td>
</tr>
<tr>
<td></td>
<td>- Live chat</td>
</tr>
<tr>
<td>Smart Calendar Tool</td>
<td>It provides a quick way to assist users to find available or free time on the calendar</td>
</tr>
<tr>
<td>Time Block Booking</td>
<td>Through this feature, it is possible to divide a day into morning session, afternoon session and overnight session. Users make bookings for time blocks instead of running time</td>
</tr>
<tr>
<td>Simplify Event Save</td>
<td>In the current version, users must click on Save Changes to save the onscreen bookings. The aim is to save each event with one Save action.</td>
</tr>
<tr>
<td>Coupling Facilities</td>
<td>Through coupling facilities, bookings to one facility can apply to any coupled facilities</td>
</tr>
<tr>
<td>Invoice PDF convertor</td>
<td>Convert the current HTM invoice statement to a PDF statement</td>
</tr>
<tr>
<td>System Wizards</td>
<td>In addition to Facility Wizard and Training Certification Wizard, we will implement System Configuration Wizard</td>
</tr>
<tr>
<td>Subscription Manager</td>
<td>Providing the required functionality for membership business model</td>
</tr>
<tr>
<td>Tracking Samples</td>
<td>Mainly:</td>
</tr>
<tr>
<td></td>
<td>- Quotation set up</td>
</tr>
<tr>
<td></td>
<td>- Periodic reporting</td>
</tr>
<tr>
<td></td>
<td>- Invoicing for selected open sample job</td>
</tr>
<tr>
<td></td>
<td>- Job search with invoicing details</td>
</tr>
<tr>
<td></td>
<td>- Facility session data integration</td>
</tr>
<tr>
<td>Database Engine</td>
<td>PostgreSQL database to replace the current BDE</td>
</tr>
<tr>
<td>Server Programs</td>
<td>Re-design logon server and email server applications to run as Windows services</td>
</tr>
</tbody>
</table>

8.2 Plug-In Modules

Plug-in modules form the critical parts of ACLS. Some have been implemented and more effort will be made to improve and develop new modules in future ACLS:
<table>
<thead>
<tr>
<th>Plug-In Module</th>
<th>Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto-Sampler Integrator</td>
<td>Through <strong>aSI</strong>, ACLS integrates with auto-samplers to retrieve the running logs and generate reports and invoices accordingly.</td>
<td><em>To be implemented</em></td>
</tr>
<tr>
<td>Batch Data Report Tool</td>
<td><strong>bDRT</strong> enables ACLS to produce reports in bulk mode. Further integration with <strong>eDM</strong> is required.</td>
<td><em>Implemented</em></td>
</tr>
<tr>
<td>Batch Invoice Statement Tool</td>
<td><strong>bIST</strong> enables ACLS to generate invoice statements in bulk.</td>
<td><em>Implemented</em></td>
</tr>
<tr>
<td>Communication Protocol Module</td>
<td><strong>cPM</strong> provides a communication platform between staff and users who operate a facility or instrument.</td>
<td><em>To be implemented</em></td>
</tr>
<tr>
<td>Excel Data Manager</td>
<td><strong>eDM</strong> offers an Excel data export tool, which can be used to export user data, booking data and usage data via Excel files.</td>
<td><em>Implemented</em></td>
</tr>
<tr>
<td>Hub Trust Node</td>
<td><strong>hTrustNode</strong> is a utility for a corporate level of data sharing. Through it, ACLS can establish a direct link with each individual node for data sharing of current facility status and other information.</td>
<td><em>Implemented</em></td>
</tr>
<tr>
<td>iCal Protocol</td>
<td><strong>iCAL</strong> enables the export and sharing of the booking calendar with local calendar applications, such as Outlook, Thunderbird, Macmail.</td>
<td><em>Implemented</em></td>
</tr>
<tr>
<td>Incident Report Ticket Monitor</td>
<td><strong>iRTM</strong> provides a platform between users and staff to report and respond to incidents at different levels.</td>
<td><em>To be implemented</em></td>
</tr>
<tr>
<td>Mobile Access</td>
<td><strong>MobileLight</strong> is a smart mobile application for iPhone, Android and Windows mobiles.</td>
<td><em>Implemented</em></td>
</tr>
<tr>
<td>Survey Creator</td>
<td><strong>iSurvey</strong> allows you to conduct surveys, to create, publish, and analyse the results.</td>
<td><em>Implemented</em></td>
</tr>
<tr>
<td>LDAP</td>
<td><strong>IDAP</strong> enables ACLS to integrate with the organization-wide active directory authentication scheme to realize single web access authentication.</td>
<td><em>Implemented</em></td>
</tr>
<tr>
<td>Mobile Messaging</td>
<td><strong>sms</strong> works with Redcoal mobile messaging service provider so that the system can send an instant SMS to staff or users’ mobiles for immediate attention.</td>
<td><em>Implemented</em></td>
</tr>
<tr>
<td>Training Event Booking Tool</td>
<td><strong>1EB</strong> is the training booking tool</td>
<td><em>Implemented</em></td>
</tr>
<tr>
<td>User Event Booking Tool</td>
<td><strong>uEB</strong> is the user booking tool</td>
<td><em>Implemented</em></td>
</tr>
</tbody>
</table>
9 Appendix A – Modification for ANFF

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) and ANFF Queensland Node.

This appendix intends to provide an operational guide to the customized ACLS for ANFF.

9.1 Modification for MCN

9.1.1 Background

The modification has been developed for the cost centre or business model running at MCN.

A provisional pricing schedule for the MCN, in accordance with ANFF documentation, is indicated below in Table 1. Basic consumables are included in the cost price; however, specialised 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 subsidised access to the Facility 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.

Table 1: Pricing regimes for basic access to the MCN

<table>
<thead>
<tr>
<th>Support Provided</th>
<th>PhD Student</th>
<th>University PF Researcher</th>
<th>Industry User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unassisted</td>
<td>A</td>
<td>B</td>
<td>C</td>
</tr>
<tr>
<td>Assisted</td>
<td>D</td>
<td>E</td>
<td>F</td>
</tr>
</tbody>
</table>

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 the 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 Organisation’s laboratories will be determined by the facility managers at those laboratories.
Table 2: Charges Relating to Access of MCN Facility and Equipment

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Booking</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cleanroom</td>
<td>Hourly</td>
<td>$ 50</td>
<td>$ 50</td>
<td>$100</td>
<td>$ 75</td>
<td>$100</td>
<td>$150</td>
</tr>
<tr>
<td>Bio Lab</td>
<td>Hourly</td>
<td>$ 40</td>
<td>$ 40</td>
<td>$100</td>
<td>$ 50</td>
<td>$ 50</td>
<td>$150</td>
</tr>
<tr>
<td>EBL</td>
<td>3-7 hrs</td>
<td>$200</td>
<td>$250</td>
<td>$400</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DRIE (per system)</td>
<td>3-7 hrs</td>
<td>$100</td>
<td>$150</td>
<td>$200</td>
<td>$150</td>
<td>$200</td>
<td>$300</td>
</tr>
<tr>
<td>PECVD</td>
<td>3-7 hrs</td>
<td>$100</td>
<td>$150</td>
<td>$200</td>
<td>$150</td>
<td>$200</td>
<td>$300</td>
</tr>
<tr>
<td>FIB</td>
<td>3-7 hrs</td>
<td>$ 75</td>
<td>$100</td>
<td>$150</td>
<td>$100</td>
<td>$150</td>
<td>$200</td>
</tr>
<tr>
<td>SEM</td>
<td>Hourly</td>
<td>$ 75</td>
<td>$100</td>
<td>$150</td>
<td>$100</td>
<td>$150</td>
<td>$200</td>
</tr>
<tr>
<td>PVD (EBeam)</td>
<td>3-7hrs</td>
<td>$ 75</td>
<td>$100</td>
<td>$150</td>
<td>$100</td>
<td>$150</td>
<td>$200</td>
</tr>
<tr>
<td>PVD (SPUTTER)</td>
<td>3-7hrs</td>
<td>$ 75</td>
<td>$100</td>
<td>$150</td>
<td>$100</td>
<td>$150</td>
<td>$200</td>
</tr>
<tr>
<td>POLYMER SYSTEM</td>
<td>3-7 hrs</td>
<td>$ 75</td>
<td>$100</td>
<td>$150</td>
<td>$100</td>
<td>$150</td>
<td>$200</td>
</tr>
<tr>
<td>NIL/EMBOSSING</td>
<td>3 hrs</td>
<td>$ 75</td>
<td>$100</td>
<td>$150</td>
<td>$100</td>
<td>$150</td>
<td>$200</td>
</tr>
<tr>
<td>AFM</td>
<td>Hourly</td>
<td>$ 75</td>
<td>$100</td>
<td>$150</td>
<td>$100</td>
<td>$150</td>
<td>$200</td>
</tr>
<tr>
<td>CONFOCAL</td>
<td>Hourly</td>
<td>$ 75</td>
<td>$100</td>
<td>$150</td>
<td>$100</td>
<td>$150</td>
<td>$200</td>
</tr>
</tbody>
</table>

The following sections guide you step-by-step to set up the system.

9.1.2 Set Up Charge Category

Go to Staff Resources -> 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.

Click on Full View of Charge Categories to access information panel of charge categories:
9.1.3 Set Charge Category vs Facility

Each facility must set up charge categories before staff can assign the charge category to each user. If the user is not assigned a facility vs charge category, they are not able to make any bookings.

- Go to Facility Manager to set up charge category for each facility:

9.1.4 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 facility 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 page of editing user profile, then click on **Edit User Charge Category** button as in the snapshot below.

![Edit User Charge Category](image)

Then follow the charge category setup page as below:

![Charge Category Setup](image)

Select the facility, and choose the category by clicking on the radio button to complete. You are able to find the charge category list for each user in the field of **Charge Category** at the user's profile page.

### 9.1.5 Automatic Charge Category for new users

Through **Charge Category Manager**, you are able to map the relationship by clicking on **Charge Category vs Type of Researcher** as below.
Appendix A – Modification for ANFF

Then map the relationship.

Following approval of online registration, the system automatically sets up a user charge category for each facility accordingly. However, if there is no relation established between the type of researcher and the charge category, no actions are taken for auto-rollover.

9.1.6 Automatic Charge Category for new Facility

You can apply the default charge category for all the users who have no charge category assigned for a particular facility. The default charge category is “assisted”.

In Facility Manager, click on Set Default Charge Category To All Users button.

Upon completion, the system shows up the number of users who have been assigned the default charge category through this action.
Appendix A – Modification for ANFF

9.1.7 Facility vs Charge Category

Upon clicking on Facility vs Charge Category Chart, a page with detailed information is shown for easy reference.

9.1.8 Reports and Invoice Statements

The system calculates the charges and generates the reports with the charge category.
9.1.9 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
Appendix A – Modification for ANFF

With respect to the standard, split address fields, given name, family name, work phone and email have been added to the new supervisor registration.

- Facility page

With respect to the standard, “Do you want this to be performed by MCN staff?” has been added. The Facility of Interest list can be set up through Facility Manager.

- Submission page

With respect to the standard, a confirmation checkbox has been added on the final confirmation page of 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

### 9.1.10 *Set Up Local Contacts*

Go to **Staff Resources → Local Contact Manager**, admin staff can easily set up the list of local contacts as illustrated below:
9.1.11 Register Supervisors

Supervisor details can be added or edited in the following format:

The supervisor address format on the invoice statement is the same.

9.1.12 Discount Field for Budget Envelop Manager

A discount field has been added to the budget to deal with discounted charges to the bookings upon monthly rollover. In Budget Manager, you can set up a discount with up to two decimal points.
Once you have done the rollover, the discount field is locked to prevent any further changes. So the discount can apply consistently to each rollover.

9.1.13 Unassisted and Assisted Bookings

The following booking functions are done for MCN to replace the standard Facility 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 given as below.
A few new concepts are introduced to this template:

- Staff time facility: you need to set up the staff time facility through facility manager.
- Staff time duration: if you choose the staff time facility for the booking event, you should select the duration accordingly. The default value is 1 hour.
- Book for Training: if this event session is for user training, please check the box.

Furthermore, the booking report shows bookings for work for an industry partner separately.
9.1.14 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.

9.1.15 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.
9.1.16 Booking Confirmation for Black Listed Users

For unassisted bookings, the system will send out a copy of the booking confirmation to the trainers of that facility if the “Black Listed” setting in the user profile is checked.

9.1.17 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 discount change logs and are able to 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.

9.1.18 Reports and Invoices

All the reports and invoices are integrated with the account discount.

9.1.19 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 Logs.
9.1.20  **Scheduled and Unscheduled Service Bookings**

‘Unscheduled’ and ‘Scheduled’ service booking concepts are added to ACLS.

The default is ‘Scheduled’ for facility scheduled service or maintenance. Service bookings in the past, before this new ACLS update, are regarded as ‘Scheduled’ service bookings.

9.1.21  **Broadcast Messages To Newly Trained Users**
Appendix A – Modification for ANFF

‘Newly Trained Users’ is added. Click on ‘To Newly Trained Users’ to access. As usual, type in subject and message body, select the 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 of time.

For example, if you choose 2 for Last Period in Month, the message is sent to the users who received the training in the last two months.

9.1.22 Survey Creator

A number of changes have been made to Survey Creator.

Create Survey:

You are able to set the survey as compulsory to achieve 100% participation by the targeted users.
Choose Targeted Users

In the current version, you are able to select ‘All’ or ‘Newly Trained Users’. This option is only effective if the survey is set to compulsory. The targeted users are listed for information.

The other features and functions of Survey Creator remain unchanged.

9.1.23 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.
9.1.24  **MCN Instruments – Hours of Usage**

Hours of Usage summarises the usage each month in the format of the MCN requirements. Two options are available:

**Single facility hours of usage:**

**Multiple facility hours of usage:**
The process between single facility and multiple facility is the same. Choose the facility, select start month and end month, then click on ‘Continue’ button.

In the example below, two facilities are selected:
Export to Excel:

You are able to export the hours of usage to Excel anytime. Two file naming protocols are defined as follows:

- **Single facility**: The format of the file name is 'facility name-startmonthyear-endmonthyear-dateofcreation'
- **Multiple facilities**: The format of the file name is 'multiplefacility-startmonthyear-endmonthyear-dateofcreation'
9.2 Modification for ANFF QLD Node

9.2.1 Background

ANFF QLD Node requested to modify the ACLS (MCN) 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:

- Online registration submission
- Online registration approval
- Manual user registration by admin staff
- Project membership registration
- Project top up hour tracking
- Project daily updating to remaining hours
- Facility 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
- Consumable ordering and resources
  - Order consumables by users
  - Register and edit consumables by admin staff
  - Top up consumables by admin staff
  - Consumable reports

9.2.2 Register Project

Through Staff Resources -> Project Manager, you can set up project memberships. 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. The Charge Category term is used to be consistent with the MCN version.

- Step 1: Set Up Charge Category

Through Charge Category Manager, you can set up a list of categories as illustrated below.

![Charge Category Table](image-url)
• Step 2: Set Up Charge Tier

Through **Charge Tier Manager**, you can set up charge tiers.

![Charge Tier Table]

• Step 3: Set Up Rate

When you click on **Rate Settings of Charge Tier vs Charge Category**, you can see a rate matrix table as shown below.

![Rate Settings Table]

Click on checkbox next to **Edit** to change the rate.

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:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Name</td>
<td>Project name, should be verified by the staff</td>
</tr>
<tr>
<td>Charge Category</td>
<td>Charge category, set up through charge category manager</td>
</tr>
<tr>
<td>Charge Tier</td>
<td>Charge tier, set up through charge tier manager</td>
</tr>
<tr>
<td>Charge Rate/ Hour</td>
<td>Auto-loads after the selection of charge category and charge tier</td>
</tr>
<tr>
<td>Membership</td>
<td>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.</td>
</tr>
<tr>
<td>----------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Supervisor who oversees the project</td>
</tr>
<tr>
<td>Project Status</td>
<td>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.</td>
</tr>
</tbody>
</table>

You can see the full chart of project information:

![Active Project Chart]

### 9.2.3 Register Membership

Through **Staff Resources -> Supervisor Manager**, you can set up memberships.

![Supervisor Manager]

Each supervisor can have charge of only one membership, but each membership can connect to multiple projects through the project settings explained above.
9.2.4 Register Facility

Use the same method as described in the standard ACLS manual, go to Facility Manager to set up facilities.

3 additional fields have been set up for each facility:

- Description
- Location
- Levy/Hour
The levy is used for additional charges to bookings. For example, if the charge rate is $20/hour, and levy setting is $10/hour, then the final charge rate is $30/hour.

9.2.5 **Online Registration**

The 3 steps to complete online registration are coded according to ANFF QLD requirements.

The supervisor list is compiled through the active project profiles. Upon submission of the project, the system sends a notice to users and staff members.
When you sign in to ACLS, you can see the number of new registrations pending approval.

The approval process is the same as for the standard ACLS.

9.2.6 *Update Project to User Profile*

All the functions in User Profile are revised for this project.

You are able to add projects to the user through Edit User Projects.
The information icon contains detailed project information, simply click on icon to view.

9.2.7 Search New User

Search New User result is modified to the requested format as below.

9.2.8 Booking Report By School/Organization

This function is modified to show a report for all schools and organizations on one page: monthly or by selected period.
Appendix A – Modification for ANFF

- Monthly Report:

- Period Report:

9.2.9 User Booking Report

When clicking on “User Booking Report”, ACLS shows you the current year booking events. Clicking on “Period User Booking Report” shows a list of all the events for any period of time.
9.2.10 **Consumable Resources**

Consumable Resources is new in response to ANFF QLD Node requirements. Staff can register, edit, order, track and manage the consumables through this feature. Users can only place an order for the consumables.

In Consumable Resources, there are a number of tools as shown below.

9.2.11 **Register Consumables**

You can register new consumables, and search and edit existing consumables.
The consumable parameters are explained in the table below:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumable Code</td>
<td>A short code to represent the consumable</td>
</tr>
<tr>
<td>Description</td>
<td>Description of consumable</td>
</tr>
<tr>
<td>Unit</td>
<td>Individually defined</td>
</tr>
<tr>
<td>Price per Unit</td>
<td>For example, $55 per 100pc</td>
</tr>
<tr>
<td>Stock Quantity</td>
<td>The current stock quantity, this value is constantly updated against the</td>
</tr>
<tr>
<td></td>
<td>consumable orders once a week. You can check the top up records.</td>
</tr>
<tr>
<td>Reorder Quantity</td>
<td>This is used as a threshold to trigger an alert to the staff if the stock</td>
</tr>
<tr>
<td></td>
<td>quantity is less than the reorder quantity. The system runs an order update</td>
</tr>
<tr>
<td></td>
<td>at 12am each Saturday, then sends out any necessary alerts.</td>
</tr>
<tr>
<td>Active Status</td>
<td>If inactive, the consumable is taken off the order list.</td>
</tr>
</tbody>
</table>

9.2.12 Search Consumables

This function is open to all staff in case they need to check consumable information or stock quantity.

9.2.13 Consumable Reports

There are two reporting tools available:

- Report by Consumables
  - Step 1: Select the time period for report:
- Step 2: Select the consumable from the dropdown list:

- Step 3: Compile the report:
• Report by Supervisors

  ▪ Step 1: Select the time period for report:

    ![Order Report By Supervisor]

  ▪ Step 2: Select the supervisor from the dropdown list:

    ![Select Supervisor]

  ▪ Step 3: Compile the report:

    ![Stocktake AdHoc]

An efficient way to check if the report is correct is by comparing the reports run against consumables and those run against supervisors.

9.2.14 Stocktake Consumables

The consumable store is like a warehouse. Stocktaking is an effective way to ensure the stock quantity is correct and updated properly.

You are able to do this for ‘active’ consumables and ‘inactive’ consumables respectively.
Click on the ‘Stocktake Records’ button to continue. In this example, you are provided all the details for orders and top ups.

To further assist you in monitoring the consumable order trend, a bar chart is available:
9.2.15 **Order Consumables**

Any users can order consumables through My Dashboard.

- **Step 1: Select the project:**
• Step 2: Enter the order quantity:

Click on **Place Order** to complete. The system updates the **Currently Ordered for This Week** table automatically.

The above snapshots are for administrators. General users just need to select projects to place consumable orders.

The system runs a weekly update for consumable orders, at 12am each Saturday. The week definition is Saturday to Friday.

**9.2.16 FAQ**

1. **How can I find projects under a particular supervisor?**

   *Click on ‘Sort Projects by Supervisor’.*

2. **What is the relationship between project and membership?**

   *Each project has a cost center 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 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.*

3. **What do you mean the system tracks the top up records?**

   *On the supervisor table (as shown below), you can click to view the history of top up hours.*
4. How does the system update remaining hours automatically?

*ACLS email server runs a remaining hours check against the previous day bookings every midnight. If the remaining hours are less than the pre-set alert threshold, the systemsends an alert message to the generic 'Contact Us Email' in the systemsettings.*

5. If I add or cancel past booked sessions through the Data Logbook Manager, can the system automatically update the remaining hours?

*No. You have to update it manually. Do this through project top up.*

6. Question: Can I top up membership from Dashboard?

*Yes. Click on ‘Top Up Membership’ block …*

*Enter the top up figures …*
7. Can I top up the consumable stock anytime?
   
   Yes, on the consumable edit page, simply click on ‘to top up stock’:

8. Can any staff register and edit consumables?
   
   No, only admin staff can do this.

9. What if the stock quantity is wrong after a stocktake?
   
   You will need to look into the possible causes, and use the top up tool to adjust the stock quantity in ACLS.

10. What is the ‘Update’ Button for on the Consumable Order page?

   Users can amend an ordered quantity within the current week before 11:59pm Friday. When an order quantity is changed, you need to click on ‘Update’ to confirm.

11. What if I didn’t choose the staff time facility and save the booking?

   The system treats this booking as the booking for the user.
12. **What if I choose the staff time facility and save the booking?**

   The system saves the booking to this facility in the name of the selected user, and also saves the bookings to the staff time facility at the same time. If the staff time facility is not available for booking, then this booking is declined.

13. **Why cannot I find the staff time facility in the dropdown list?**

   You haven’t set it up yet through Facility Manager.
10 Appendix B – Modification for IHMRI

IHMRI stands for ILLAWARRA HEALTH AND MEDICAL RESEARCH INSTITUTE. Customization has been done since 2011 according to the requirements provided by IHMRI.

This appendix intends to provide an operational guide to the customized ACLS for IHMRI.

10.1 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/fault, the extent of the damage, and urgency of response needed.

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green light</td>
<td>Equipment all ok</td>
</tr>
<tr>
<td>Amber light</td>
<td>Needs maintenance but can continue working</td>
</tr>
<tr>
<td>Red light</td>
<td>Needs maintenance, equipment inoperable</td>
</tr>
<tr>
<td>Red light</td>
<td>Incident, other equipment damaged</td>
</tr>
</tbody>
</table>

In the latter situation the whole room would be shut. In which 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. In this case, 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.

IHMRI requires that lab staff can schedule regular periods when equipment will be out of service (ie un-bookable) for maintenance. This would be best done as they add each new piece of equipment to the facility 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 organise them
- Records of all repairs/maintenance and costs, who performed them, what the problem was etc
- Records of whether works were scheduled or unscheduled
- Plus a place to record:
Appendix B – Modification for IHMRI

- 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 & 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 IHMRI, 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 facility according to the pre-set incident category
- Asset: refers to “any facility” to be registered as an “asset”. So an asset must be a facility, but not vice versa
- Material: refers to any materialized items, be they hard material, software, or an application
- Labor: refers to any work involved
- Facility Assembly: refers to assembly parts or components of a facility
Appendix B – Modification for IHMRI

Flow Chart of Process


AC LAB SYSTEM
The following chapters relate directly to the process set out in the flow chart.

### 10.2 How to Set Up Incident Category

First of all, 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

### 10.3 How to Report an Incident

Through My Dashboard, you can easily browse the incident menu as illustrated below.

<table>
<thead>
<tr>
<th>Functions</th>
<th>Access Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Incident</td>
<td>All users can access to lodge an incident</td>
</tr>
<tr>
<td>Search Incident</td>
<td>Users can only search those incidents they submitted. Open to all staff</td>
</tr>
</tbody>
</table>

Click on Report Incident to lodge an incident:
Appendix B – Modification for IHMRI

- Select Facility Group
- Select Facility
- Select Incident Category
- Enter description of fault

Then submit. Upon submission, the system sends an email notification to the staff in charge, the owner(s) of the incident category.

10.4 How to Respond to an Incident

The system shows the reported incidents on Need Attention, simply click on To Update or To Respond next to each incident to start your action.

The "i" 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

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Green Light</strong></td>
<td>Equipment all ok</td>
</tr>
<tr>
<td><strong>Amber Light</strong></td>
<td>Needs maintenance but can continue working</td>
</tr>
<tr>
<td><strong>Red Light</strong></td>
<td>Needs maintenance, equipment inoperable</td>
</tr>
<tr>
<td><strong>Flash Red Light</strong></td>
<td>Incident, other equipment damaged</td>
</tr>
</tbody>
</table>

- 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.
10.5 How to Search for an Incident

Multiple searching tools are provided to find incidents: by status, by facility and by incident category. They are only accessible to staff members.

My Reported Incidents offers users a tool to check their reported incident details.

See example below, searching all open incidents:

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.

10.6 How to Make Scheduled Maintenance & Unscheduled Service Bookings

By default, all unscheduled service bookings can only be made through the incident response process.
Scheduled maintenance bookings can be made through the booking pages as below.

Before digging 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 are able to add and edit companies as required. Here is the template to enter the relevant data:
Appendix B – Modification for IHMRI

Up to 3 contacts can be added for the same company. To remove a company from the active list, simply uncheck the box of “Enabled”.

- Register Asset:

Following a request made by IHMRI, we introduced the new concept of Facility Assembly to manage the asset by both Facility and Assembly (one level down).

You can set the facility assembly through Facility Manager.

Here is an example of the facility assembly chart:
We need to define the term asset: In the system, an asset must be a facility or facility assembly, but a facility or facility assembly does not have to be an asset. Before you are able to register a facility assembly as an asset, you must register its facility as an asset first.

Asset data fields are defined as follows:

<table>
<thead>
<tr>
<th>Purchase Date</th>
<th>15.7.10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Original cost of item</td>
<td>$155,000</td>
</tr>
<tr>
<td>Depreciation</td>
<td>5%pa</td>
</tr>
<tr>
<td>Details of service contracts – cost, and what it covers</td>
<td></td>
</tr>
<tr>
<td>Cost: $15,000 per year</td>
<td></td>
</tr>
<tr>
<td>Covers: 2 x scheduled maintenance per year, parts for scheduled maintenance, travel time. Does not cover services for breakdowns</td>
<td></td>
</tr>
<tr>
<td>Lifespan of item</td>
<td>7 yrs</td>
</tr>
<tr>
<td>End of Life calculation, that warns on the dashboard when it’s drawing close (more notice for more expensive items)</td>
<td>15.7.17</td>
</tr>
<tr>
<td>Asset numbers</td>
<td>12 588746 48976 (the number will come off a barcode issued by the university)</td>
</tr>
<tr>
<td>Location</td>
<td>Bldg 32.115</td>
</tr>
<tr>
<td>Suppliers &amp; supplier details</td>
<td></td>
</tr>
<tr>
<td>KI Scientific</td>
<td></td>
</tr>
<tr>
<td>41564 Smith Street</td>
<td></td>
</tr>
<tr>
<td>Sydney</td>
<td></td>
</tr>
<tr>
<td>Ph</td>
<td>6351 6112</td>
</tr>
<tr>
<td>Fax</td>
<td>4543 1454</td>
</tr>
<tr>
<td>Contact</td>
<td>Peter Jones</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:pjones@ki.com.au">pjones@ki.com.au</a></td>
</tr>
<tr>
<td>Details of required software</td>
<td>Software is called ‘flowjo’. Needs to work from Mac with OS10.4 or higher.</td>
</tr>
<tr>
<td>Whether it is networked or not</td>
<td>Yes, data point number A-226</td>
</tr>
<tr>
<td>Extra notes section to record things, such as computer passwords and any extra information</td>
<td>Password for software is: ihmri446</td>
</tr>
</tbody>
</table>
Here is the template to enter the asset data (facility as asset):
Data entry is explained as below:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility</td>
<td>Not editable</td>
</tr>
<tr>
<td>Manufacturer</td>
<td>By selection</td>
</tr>
<tr>
<td>Asset Number</td>
<td>As per your local requirement</td>
</tr>
<tr>
<td>Purchase Order Number</td>
<td>As per your local requirement</td>
</tr>
<tr>
<td>Model Number/Name</td>
<td>As per your local requirement</td>
</tr>
<tr>
<td>Serial Number</td>
<td>As per your local requirement</td>
</tr>
<tr>
<td>Location</td>
<td>Where it is located</td>
</tr>
<tr>
<td>Original Cost</td>
<td>Purchase price of the facility</td>
</tr>
<tr>
<td>Purchase Date</td>
<td>Date of procurement</td>
</tr>
<tr>
<td>Depreciation/Year</td>
<td>Percentage</td>
</tr>
<tr>
<td>Lifespan</td>
<td>Number of Years</td>
</tr>
<tr>
<td>End of Life calculation</td>
<td>Date of selection</td>
</tr>
<tr>
<td>Current Value After Depreciation</td>
<td>Calculated by the system automatically</td>
</tr>
<tr>
<td>Facility Networked</td>
<td>Yes/No</td>
</tr>
<tr>
<td>Software Details</td>
<td>Detailed description of software</td>
</tr>
<tr>
<td>Passwords</td>
<td>Password for applications</td>
</tr>
<tr>
<td>Notes</td>
<td>For anything you wish to record</td>
</tr>
</tbody>
</table>

To record the contract, click on **Contract Record Desk** at the bottom of the page.
There are 4 types of contracts defined as follows:

- **Consumables:**

<table>
<thead>
<tr>
<th>Purchase Date</th>
<th>Description</th>
<th>Quantity</th>
<th>Total Cost</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar selection</td>
<td>Drop down list of active consumables from registry</td>
<td>$ = Automatically calculated based on quantity entered and total cost in registry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>01/01/12</td>
<td>Formalin, 5 L bottle</td>
<td>2</td>
<td>$24</td>
<td></td>
</tr>
</tbody>
</table>

- **Warranty / Maintenance:**

<table>
<thead>
<tr>
<th>Purchase Date</th>
<th>Manufacturer / Service Provider</th>
<th>Valid From</th>
<th>Valid To</th>
<th>Total Cost</th>
<th>Status</th>
<th>Years</th>
<th>Cost per calendar year*</th>
<th>Contract Pdf</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar selection</td>
<td>Drop down Calendar selection</td>
<td>Calendar selection</td>
<td>$ = Calculated from total cost, number of years, and valid to/from dates</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13/12/08</td>
<td>Thermo</td>
<td>01/01/10</td>
<td>31/12/11</td>
<td>$1500</td>
<td>Inactive</td>
<td>2</td>
<td>$750</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/12/11</td>
<td>Thermo</td>
<td>01/01/12</td>
<td>31/12/14</td>
<td>$2000</td>
<td>Active</td>
<td>2</td>
<td>$1000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Service:**

<table>
<thead>
<tr>
<th>Service Date</th>
<th>Incident Number</th>
<th>Manufacturer / Service Provider</th>
<th>Total Cost</th>
<th>Contract Pdf</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar selection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>05/03/10</td>
<td>4</td>
<td>Thermo</td>
<td>$1000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16/09/10</td>
<td>12</td>
<td>Thermo</td>
<td>$500</td>
<td></td>
<td></td>
</tr>
<tr>
<td>01/3/11</td>
<td>35</td>
<td>Thermo</td>
<td>$650</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Purchase:**

<table>
<thead>
<tr>
<th>Contract Pdf</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can add as many contracts per asset as you wish. Types of contract are predefined in the system:

- Consumables
- Maintenance
- Service
- Purchase
- Warranty
Click on *and details* to see each contract under contract type. Through this option you are able to register contracts by different types.

- **Register Consumables:**

You are able to register new consumables, and edit those with active status.

You can find the registered consumables, simply type keywords to find them.
Appendix B – Modification for IHMRI

For those with inactive status, you can only edit those that have expired less than 30 days. Here are the details of consumable parameters:

<table>
<thead>
<tr>
<th>Description</th>
<th>Cost</th>
<th>Supplier</th>
<th>Catalogue Number</th>
<th>Valid From</th>
<th>Valid Until</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text box (at least 75 characters)</td>
<td>$</td>
<td>Drop down list of manufacturer s from company registry</td>
<td>Calendar selection</td>
<td>Calendar selection</td>
<td>Automatically calculated based on valid until date &lt; current date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nitrogen Gas, G-size cylinder</td>
<td>$12</td>
<td>BOC</td>
<td>123</td>
<td>01/01/10</td>
<td></td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>

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.

10.7 Contract Expiry Alert

The contract expiry alert applies to maintenance and warranty contracts. Upon activating the alert, an alert will be sent out to the staff (set up through email receivers) via email.
Go to *Email Receiver* to set up the proper receivers for the contract expiry alerts.

### 10.8 Search Contract

Searching contract page is modified to suit IHMRI needs.

<table>
<thead>
<tr>
<th>Facility Group</th>
<th>Search Criteria (optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility Assembly</td>
<td>Search Criteria (optional)</td>
</tr>
<tr>
<td>Company</td>
<td>Search Criteria (optional)</td>
</tr>
<tr>
<td>Type</td>
<td>Tick boxes for All, maintenance, service, consumable, or asset</td>
</tr>
<tr>
<td>Date</td>
<td>Search Criteria – start date and end date (optional)</td>
</tr>
</tbody>
</table>
Search results are shown as below.

10.9 Data Report and Invoice Statement

In data reports, manual polling, and through bDRT (Batch Data Report Tool), service bookings and maintenance bookings are treated as different bookings.

Here is a snapshot of the report sample:

In the invoicing statement, as usual, both bookings are filtered out.
10.10 Access to Facility Lifespan

Through Report Manager -> Facility 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 them all.

10.11 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 facility
- Summary by contract type
- Itemised report

Through the option table as below, you can sort the report by a number of options.
Appendix B – Modification for IHMRI

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Radio buttons - Itemised Report, Summary by Contract Type, Summary by Facility (Summary by Facility is default).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility</td>
<td>Search Criteria (optional)</td>
</tr>
<tr>
<td>Facility Group</td>
<td>Search Criteria (optional)</td>
</tr>
<tr>
<td>Facility Assembly</td>
<td>Search Criteria (optional)</td>
</tr>
<tr>
<td>Company</td>
<td>Search Criteria (optional)</td>
</tr>
<tr>
<td>Type</td>
<td>Tick boxes for All, maintenance, service, consumable or asset</td>
</tr>
<tr>
<td>Date</td>
<td>Search Criteria – start date and end date (optional)</td>
</tr>
<tr>
<td></td>
<td>Maintenance – use Valid To date</td>
</tr>
<tr>
<td></td>
<td>Service – use Service Date</td>
</tr>
<tr>
<td></td>
<td>Consumables – use Start Date</td>
</tr>
<tr>
<td></td>
<td>Asset – use Purchase Date</td>
</tr>
</tbody>
</table>

Through the facility group, facility and facility assembly are linked for selection. The report depends on the selections as described below:

- If a facility group is selected ONLY, then the report runs against the selected facility group
- If a facility is selected ONLY, then the report runs against the selected facility
- If facility assembly is selected ONLY, then the report runs against the selected facility assembly
- If no facility group is selected, then the report runs against all the facilities

AC LAB SYSTEM
**Summary by Facility:**

The screenshot below is a summary by facility for the facility group ‘LAB – CENTRIFUGES’.

![Summary by Facility Table]

**Summary by Contract Type:**

The screenshot below is a summary by contract type for the facility group ‘LAB – CENTRIFUGES’.

![Summary by Contract Type Table]
Itemised Report:

The screenshot below is an itemised report for the facility group ‘LAB – CENTRIFUGES’.

The itemised report does not include assets as the contract type is not available to assets. Assets can have a few contract types, but assets are not contract types.

*Note: The finance report can be exported to EXCEL. This capability is not available yet.*

10.12 Booking Report

Booking report is modified to provide an option table, so you can generate the following report types.

- Itemised report
- Summary by booking type
- Summary by supervisor
- Summary by facility
In this modification, the concept of ‘Report – Hours per Day’ is introduced. To make it work, you need to go to Facility Manager to set this up for each facility. The default is zero.
**Summary by facility:**

<table>
<thead>
<tr>
<th>Facility</th>
<th>Booked Hours</th>
<th>% Usage Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lab - Biological Safety Cabinets</td>
<td>36.75</td>
<td>0.00%</td>
</tr>
<tr>
<td>Lab - Biological Safety Cabinets</td>
<td>3</td>
<td>0.00%</td>
</tr>
<tr>
<td>Lab - Biological Safety Cabinets</td>
<td>10.75</td>
<td>0.00%</td>
</tr>
<tr>
<td>Lab - Biological Safety Cabinets</td>
<td>5</td>
<td>0.00%</td>
</tr>
<tr>
<td>Lab - Biological Safety Cabinets</td>
<td>36.75</td>
<td>0.00%</td>
</tr>
<tr>
<td>Lab - Biological Safety Cabinets</td>
<td>36.75</td>
<td>0.00%</td>
</tr>
<tr>
<td>Lab - Biological Safety Cabinets</td>
<td>36.75</td>
<td>0.00%</td>
</tr>
<tr>
<td>Lab - Biological Safety Cabinets</td>
<td>36.75</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

**Summary by booking type:**

<table>
<thead>
<tr>
<th>Booking Type</th>
<th>Booked Hours</th>
<th>% Usage Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>4.50</td>
<td>0.00%</td>
</tr>
<tr>
<td>User</td>
<td>0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>User</td>
<td>0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>User</td>
<td>0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>User</td>
<td>0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>User</td>
<td>0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>User</td>
<td>0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>User</td>
<td>0.00</td>
<td>0.00%</td>
</tr>
</tbody>
</table>
Appendix B – Modification for IHMRI

Summary by supervisor:

<table>
<thead>
<tr>
<th>Facility</th>
<th>Facility Group</th>
<th>User</th>
<th>Supervisor</th>
<th>% Used</th>
<th>Account</th>
<th>Account (Change/Reset)</th>
<th>% Used Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARF Procedures Room 1 (R)</td>
<td>ARF - ROOMS</td>
<td>Zhiqiang Wu</td>
<td>Xu Feng Huang</td>
<td>4.50%</td>
<td>L10001</td>
<td>$0.00</td>
<td>2.07%</td>
</tr>
<tr>
<td>Total ARF Procedures Room 1 (R)</td>
<td></td>
<td></td>
<td></td>
<td>4.50%</td>
<td></td>
<td></td>
<td>2.07%</td>
</tr>
<tr>
<td>ARF Procedures Room 2 (R)</td>
<td>ARF - ROOMS</td>
<td>AllenBurke</td>
<td>Brett Garner</td>
<td>9.00%</td>
<td>L10001</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>Total ARF Procedures Room 2 (R)</td>
<td></td>
<td></td>
<td></td>
<td>9.00%</td>
<td></td>
<td></td>
<td>0.00%</td>
</tr>
<tr>
<td>BSC 1 Primary Tissue Culture, 32.211</td>
<td>LAB - BIOLOGICAL SAFETY CABINETS</td>
<td>Jessica Hughes</td>
<td>Kyle Marshfield</td>
<td>5.00%</td>
<td>L10001</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>BSC 1 Primary Tissue Culture, 32.211</td>
<td>LAB - BIOLOGICAL SAFETY CABINETS</td>
<td>Patricia Costanzo</td>
<td>Mark Wilson</td>
<td>2.00%</td>
<td>L10001</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>Total BSC 1 Primary Tissue Culture, 32.211</td>
<td></td>
<td></td>
<td></td>
<td>7.00%</td>
<td></td>
<td></td>
<td>0.00%</td>
</tr>
<tr>
<td>BSC 2 Bacterial Culture, 32.215</td>
<td>LAB - BIOLOGICAL SAFETY CABINETS</td>
<td>Timothy Berg</td>
<td>Health Excel</td>
<td>3.00%</td>
<td>L10001</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>Total BSC 2 Bacterial Culture, 32.215</td>
<td></td>
<td></td>
<td></td>
<td>3.00%</td>
<td></td>
<td></td>
<td>0.00%</td>
</tr>
<tr>
<td>BSC 3 Established Tissue Culture, 32.215</td>
<td>LAB - BIOLOGICAL SAFETY CABINETS</td>
<td>Mark Wilson</td>
<td>Health Excel</td>
<td>6.00%</td>
<td>L10001</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>BSC 3 Established Tissue Culture, 32.215</td>
<td>LAB - BIOLOGICAL SAFETY CABINETS</td>
<td>Maria Reardon</td>
<td>Health Excel</td>
<td>6.00%</td>
<td>L10001</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>Total BSC 3 Established Tissue Culture, 32.215</td>
<td></td>
<td></td>
<td></td>
<td>12.00%</td>
<td></td>
<td></td>
<td>0.00%</td>
</tr>
<tr>
<td>BSC Culture, 32.214</td>
<td>LAB - BIOLOGICAL SAFETY CABINETS</td>
<td>Kyle Marshfield</td>
<td>Nature group</td>
<td>5.00%</td>
<td>L10001</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>BSC Culture, 32.214</td>
<td>LAB - BIOLOGICAL SAFETY CABINETS</td>
<td>Mark Wilson</td>
<td>Nature group</td>
<td>2.00%</td>
<td>L10001</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>Total BSC Culture, 32.214</td>
<td></td>
<td></td>
<td></td>
<td>7.00%</td>
<td></td>
<td></td>
<td>0.00%</td>
</tr>
<tr>
<td>BSC Culture, 32.214</td>
<td>LAB - BIOLOGICAL SAFETY CABINETS</td>
<td>Masato Takei</td>
<td>Nature group</td>
<td>7.00%</td>
<td>L10001</td>
<td>$0.00</td>
<td>0.00%</td>
</tr>
<tr>
<td>Total BSC Culture, 32.214</td>
<td></td>
<td></td>
<td></td>
<td>14.00%</td>
<td></td>
<td></td>
<td>0.00%</td>
</tr>
</tbody>
</table>

Itemised Report:
10.13 Facility Alerts

Facility alerts is new in ACLS. It displays ‘open’ incidents to all the users.

ACLS applies the ‘open’ incident number on the dashboard (3 in this example).

Furthermore, the following terms are renamed accordingly:

- Change ‘to respond’ to ‘reported’
- Change ‘to update’ to ‘updated’

10.14 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 Facility 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 Facility 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 facility before making maintenance and service bookings?

Not necessary.

10. Can we search assets 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.
11 Appendix C – Modification for IFM

IMF stands for INSTITUTE FOR FRONTIER MATERIALS, GTP RESEARCH, DEAKIN UNIVERSITY. Customization has been done according to the requirements provided by IFM.

11.1 Define Business Hours

Go to System Settings -> Configure System, click on “Business Hour Settings” to set up.

Business hour settings will be used to identify ‘Out-Of-Hour’ bookings.

11.2 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 to the users who are security officer or technical manager.

For security officer group, the booking settings are irrelevant as they are not allowed to book.
11.3 Set Certificate Expiry Control

A new expiry date control is introduced to 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 facility 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 Expiry date:** Once you set it ON, the certificate itself expires on the expiry date regardless of the access to ACLS of the users holding the certificates.

11.4 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 facility groups. You are able to toggle the booking status view of each facility 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 facility locations.
11.5 Approve Out of Hour Bookings on My Dashboard
On ‘Approve Bookings’ and ‘Approve Out Of Hour Bookings’, you are able to see the latest user training record and contact users through email if needed.

11.6 FAQ

1. How does the “Valid to Expiry 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 of the system.

2. Are there any changes to the way certificates are issued?

   No. However, if you wish to extend the certificate to a new expiry date, you need to cancel the current certificate, and re-issue it. The system does 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 security view upon security officer login?

Upon login, security officer can only access the security view, through computer or mobile.
Appendix D – ACLS Logon Console with ACLS Server

ACLS Logon Console application aims to provide a client/server solution to register the actual facility/instrument/equipment operation time by users. Through the ACLS Logon Console, you can implement more secure access to facility/instrument/equipment by the ‘No Login, No Operation’ policy.

When a user comes to use equipment, they need to log in at the equipment computer through the ACLS Logon Console. ACLS checks if the user has a valid account, if the user has a valid certificate to operate the equipment, and checks against bookings (optional). During the period of operation or experiment, a user can submit experimental notes, or send in an Incident Alert (future version). When it receives an incident alert, the system sets a sticky note on the screen to alarm others, and can even send an SMS to staff mobiles.

13 Appendix E – Data Drive Connection through ACLS Logon Console

To establish a dynamic network data drive connection, you need to set up a data server to store and share experimental data with users. A single Windows share folder set up is sufficient on the data server. When a user logs in, the console communicates with the ACLS server to obtain full authentication information to make the network data connection; and when they log out, it disconnects the network drive.

This enables you to reset the network drive connection password regularly for security reasons.

- **Process of network drive connection:**
  - Console login
  - Console requests network drive settings
  - Console connects to network drive according to the settings in ACLS system, for example, drive “M”, IP of the data server, etc.
  - When successfully connected, the console renames the map drive using the name defined in the settings in the ACLS system
  - Console logout
  - Console disconnects the network drive

- **Case #1: Set up network shared folder in Data Server**

Assuming that you have a Windows data server or computer with IP address “10.1.1.1”, two local drives are available, C and D. On D Drive, create a folder named “results”, and then set up sharing to this folder over the network. You then add password protection to this shared folder “results”, for example, abcdefg, and user name as “mydata”.

When you connect or map to this shared folder on other computers, you need the following information:
- Folder destination: \10.1.1.1\results
- User name: mydata
- Password: abcdefg
• Case #2: Set up network shared folder

Using the information from Case #1, you now need to configure ACLS to the network drive through the web interface.

The following checks and set up are required when you logon to ACLS web interface:

- **“System Settings” -> “Configure System”:**
  To turn on "DataStorageCtrl" parameter

- **“System Settings” -> “Link & Directory Manager”:**
  - **Net Drive Setting:** You need to define the following parameters for the console to connect to the network drive as follows:
    - **Drive:** tells the console what drive label is used for connection, don’t use C to G as most Windows computers take them for local drives.
    - **Folder:** as a protocol of network drive mapping, you should set out the full path as standard
    - **User Name:** authentication of connection
    - **Password:** authentication of connection

- **Per Facility:** this is optional, you can set up individual folder connection to each individual equipment or facility listed in ‘Facility FTP Access Directory’.

- **Case #3: Set up individual network shared folder for each facility**

Continuing with Case #2, go to **‘Facility FTP Access Directory Settings’** to set up individual facility folder connection. The individual facility folder setup is optional depending on your preferences. For example, instead of saving data to the root directory, such as \129.94.150.15\emunit, you can go further and set up each individual facility folder to make future data sharing and archiving clear and easy, such as \129.94.150.15\images\afm.
Appendix E – Data Drive Connection through ACLS Logon Console

Here is an example of this setup:

![Facility FTP Access Directory Settings]

ACLS takes “Physical Directory” setting and keeps “afm” for example to conjunct with \129.94.150.15\emunit set out in ‘Net Drive Setting’.

- Case #4: Set up individual user folder in the network shared folder

Continuing with Case #2, through ACLS, you can set up an auto-added user folder feature so that you can save results or datasets to their own data folder on the connected network drive.

To achieve this, you need to map the same drive to the ACLS server, and establish the same settings as for the ‘Physical Directory’ in Case #3. When receiving the request from the console, the ACLS server adds a user folder with their login name. When the user logs out at the console, the server also checks if the folder is empty. If so, then the folder is removed.

The obvious benefit is that you can easily archive the data in those inactive user folders and just keep the active user folders, reducing storage space. Please contact us if you wish to do this.
Appendix F – 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 to 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 set up LDAP in ACLS, please take the following steps:

- Step 1: LDAP Test

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 LDAP 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 Login Prefix: depends on your local LDAP configuration, for example, some may need a prefix to form the login format as adunsw\0000000. So your entry is adunsw in this example
• LDAP Enable: check the box to turn on LDAP in ACLS

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”.

• Step 2: LDAP to ALL

In ACLS, you are able to control LDAP access to each individual user and staff. This means you are in a position to turn on LDAP to local users and staff, but turn off LDAP to external users.

Please check the parameter Login Using Email in Configure System, and switch it off so that you can replace email as login name with the ID.

Go to User Profile Manager, and you can decide how to turn on LDAP to each user and staff. There are two options:
  • Manual: you can turn it on by going through each user or staff one by one. This is time consuming but you are able to ensure there are no mistakes when replacing login name with the proper ID, then tick the box of LDAP Access Enabled.
  • Batch: the system provides you with a tool to switch on LDAP to all users at once. The only risk with this is that the system replaces the login name of everyone with a student/staff number. If the student/staff number is not available, then it skips. Then, you need to go through the external users to reverse the process.
Appendix F – About LDAP Implementation

You can easily check the LDAP status of each user and staff by clicking on **LDAP User Status**. A full status information table shows up as below.

![LDAP User Table](image)

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**:

![Configure System](image)

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, any users who have the email address **xxx@unsw.edu.au** are subject to this lockup. In other words, they must access ACLS through the UNSWID system.
Appendix G – About Excel Data Manager (eDM)

15Appendix G – About Excel Data Manager (eDM)

*eDM* offers a wide range of data exporting services within ACLS. Through *eDM*, you are able to export all kinds of data directly in Excel files, instead of using copy and paste of the screen data to your local Excel.

To set up *eDM*, you must install Microsoft Office 2007 or 2010 to your ACLS server, as ACLS *eDM* works with MS Office to generate Excel files.

- **Set Up eDM:**

  Go to **System Setting -> Configure System**, click on **eDM Setting** button.

  ![System Setting](image)

  You then click on **eDM Test** to continue if MS Office is installed.

  ![eDM Test](image)

  If *eDM* runs successfully, the system generates a signature Excel file for confirmation.

  ![eDM Excel Test Sheet](image)