Introduction to ACLS Guidebook

Welcome to the latest addition of the Analytical Centre Laboratory System guide. This document is a complete guide to the latest features of the ACLS software for booking and management of scientific resources.

The ACLS system has long since surpassed its original mandate as an instrument booking software utility. Now a complete management system for instrumental labs that includes accounting, billing, sample tracking, health and safety and training documentation and much more.

Working in a heterogeneous environment it is remarkable how stable yet flexible the ACLS has been. Having such a tool within the Mark Wainwright Analytical Centre has been a key factor in the success and growth of MWAC. An excellent example of the flexibility built into the ACLS is the rostering function. During COVID-19 lock-downs restrictions on the number of staff present in facilities and the ability to need to track them became an issue. The new rostering system solved both problems simply and elegantly.

The efforts in developing and implementing the ACLS have not stopped with rolling out a functional booking system. Growth, development and yes bug fixes come out with astonishing speed allowing the ACLS to adapt and grow with the evolving landscape of MWAC and the many other customers not only across Australia but around the world.

As much as the dedication Dong Ming has to the ACLS it does require constant input from its users to push the ACLS on to new frontiers and new functionality. Please send in your input to help make the ACLS even better in the future.

Dr. Donald Thomas  
Head NMR, Spectroscopy & Structural Biology Facilities  
Mark Wainwright Analytical Centre, UNSW, Sydney
Acknowledgements

The 2022 edition marks the fourteenth edition of the “ACLS Complete Guide” which started in 2008. AC Lab System has evolved over the past 13 years, and the ACLS guide is the master bible to record the growth and changes over years. In 2021, along with COVID-19 situation, we are facing difficulties with unexpected constraints and lack of resources, however, we are pulling through to fulfill many improvements beyond the expectations.

I would like to thank Dr Donald Thomas who accepted my invitation to write the introduction for this edition. My special thanks goes to Prof Peter Cumpson (Director of MWAC) and Prof Grainne Moran (Pro-Vice-Chancellor (Research Infrastructure, Division of Research) who have continued to support the ACLS. ACLS’ existence and success relies upon the entire MWAC staff feedback, support and encouragement. Furthermore, I’d like to value and appreciate the support of Dr John Zhu and Dr Sean M. Langelier at MCN, Sandy Benness at Deakin, Dr Germanas Peleckis at UOW, Dr Michael Carnell, Dr Chris Marjo, Katie Levick and Dylan Zhang at UNSW, John Murphy and A/Prof Martin Saunders at CMCA UWA, Yi Ng at SAHMRI, Dr Peter Hines at QUT and Dr Angela Halfpenny at Central Washington University, certainly, the entire ACLS community.

MoxyTouch service (powered by UniLab) integration with ACLS to provide the live calendar, live dashboard, Lab sign in and more on the smart touch screens, video presentation is available on YouTube at https://www.youtube.com/watch?v=3heqT_4GwWY.

I look forward to continue working with all of you to improve the ACLS.

Dong Zheng
ACLS Architect and Designer
Flashback

Over years, a series of ACLS complete guide was published to record the growth of ACLS, and the great support of ACLS growing community.
# Table of Contents

1 Introduction .......................................................................................................................... 9
   1.1 Version Series .................................................................................................................. 10
   1.2 Internet Browsers .......................................................................................................... 10
   1.3 Customer Support .......................................................................................................... 10
   1.4 Terminology ................................................................................................................... 10

2 System Installation ............................................................................................................... 11
   2.1 System Requirements .................................................................................................... 11
   2.2 System Installation ...................................................................................................... 12
   2.3 ACLS Tracker ............................................................................................................ 13
   2.4 Cyber security protection - XSS (Cross Site Scripting) vulnerability ......................... 14

3 Getting Started .................................................................................................................... 15
   3.1 Navigating ACLS ........................................................................................................ 15
   3.2 Selecting the Business Model ..................................................................................... 17
   3.3 Resource Multi-Dimension Charging Model ............................................................... 17
   3.4 Authentication Access ................................................................................................ 23

4 Registration ........................................................................................................................ 27
   4.1 Select Login Name ....................................................................................................... 27
   4.2 Register Users Manually ............................................................................................. 27
   4.3 Register Users Online ................................................................................................. 29
   4.4 Register Supervisors .................................................................................................. 34
   4.5 Login to ACLS ............................................................................................................. 35
   4.6 Reset Password .......................................................................................................... 35

5 Configuring ACLS .............................................................................................................. 37
   5.1 Configure System ........................................................................................................ 37
   5.2 Configure Resources .................................................................................................. 48
   5.3 Customise Resource Fields ......................................................................................... 58
   5.4 Access Group Definition ............................................................................................. 61
   5.5 Upload System Files .................................................................................................. 62
   5.6 Configure Email Receivers ......................................................................................... 63
   5.7 Configure Email Response Contents ......................................................................... 63
   5.8 Configure Data Links (UNSW Only) .......................................................................... 64
   5.9 Configure School/Org Structure ............................................................................... 67

6 Operating ACLS ............................................................................................................... 68
   6.1 Dashboard .................................................................................................................... 68
   6.2 My Calendar ............................................................................................................... 72
   6.3 Make Bookings .......................................................................................................... 73
   6.4 Booking with Form .................................................................................................... 85
   6.5 Booking Confirmation ............................................................................................... 86
   6.6 Change Bookings ....................................................................................................... 90
   6.7 Pre-Approval Bookings ............................................................................................. 91
   6.8 Set Min Booking Unit 15m vs 1h .............................................................................. 95
   6.9 About Min Hour Per Session ................................................................................... 96
   6.10 Set Up Public Access Calendar .............................................................................. 97
   6.11 Check Resource Status ........................................................................................... 98
6.12  My Bookable Resources ........................................................................................................ 99
6.13  Linked Booking Resources ................................................................................................ 99
6.14  Set Up Accounts.................................................................................................................. 104
6.15  Default User Registration Account ...................................................................................... 104
6.16  Manage Account Budget .................................................................................................. 105
6.17  Register a Project................................................................................................................ 109
6.18  Search Users....................................................................................................................... 112
6.19  Export User Data................................................................................................................ 113
6.20  Broadcast Email Notices .................................................................................................. 113
6.21  Contact User...................................................................................................................... 115
6.22  Edit Booking Data and Usage Log Data ............................................................................ 115
6.23  Generate Reports............................................................................................................... 117
6.24  Generate Invoice Statement .............................................................................................. 122
6.25  Invoicing Summary............................................................................................................ 126
6.26  Set Up Trainers and Certificates....................................................................................... 127
6.27  Appoint Any Users to Be Resource Trainer ..................................................................... 132
6.28  Record User Forms........................................................................................................... 136
6.29  Resource Documents........................................................................................................ 137
6.30  Store and Share Documents ............................................................................................. 138
6.31  Track Samples.................................................................................................................... 142
6.32  Check-in Samples................................................................................................................ 144
6.33  Process Sample Jobs......................................................................................................... 145
6.34  Check-out Samples............................................................................................................ 146
6.35  Upload Sample Analysis Results ....................................................................................... 146
6.36  Set Up Event & Holiday Calendar ................................................................................... 148
6.37  Training & Support............................................................................................................. 153
6.38  Conduct Survey.................................................................................................................. 155
6.39  Analyse Publications......................................................................................................... 163
6.40  Mobile Browser Version.................................................................................................... 164
6.41  Registration Pathway.......................................................................................................... 167
6.42  Mobile App....................................................................................................................... 171
6.43  Google Analytics.............................................................................................................. 171
6.44  Resource Catalogue ......................................................................................................... 172
6.45  Manage and Track Consumables...................................................................................... 173
6.46  Staff Comments on Users................................................................................................. 186
6.47  My Pin board...................................................................................................................... 187
6.48  Most Popular Resources .................................................................................................. 188
6.49  Most Training Resources ................................................................................................. 189
6.50  Most Outage Resources ................................................................................................... 190
6.51  Video Player...................................................................................................................... 190
6.52  User Profile Analyser ....................................................................................................... 192
6.53  Customise Induction Process............................................................................................ 194
6.54  Resource/Consumable QR Codes..................................................................................... 203
6.55  Watch Social Distancing at Lab Space (COVID-19)............................................................ 211
6.56  MoxyTouch Service (Powered by UniLab)....................................................................... 217
6.57  Live ACLS Charts to MoxyTouch .................................................................................... 218
6.58  Live ACLS Calendars to MoxyTouch ............................................................................... 222
6.59  Consumable and Resource Widgets with MoxyTouch ...................................................... 224
6.60  Staff Roster Calendar with MoxyTouch ............................................................................. 225
6.61  User Training Records with MoxyTouch .......................................................................... 228
6.62  Plug-In Modules ............................................................................................................... 228
## 7 Frequently Asked Questions

7.1 Login and Logout ........................................................................................................... 230
7.2 Online Registration ....................................................................................................... 231
7.3 Booking .......................................................................................................................... 234
7.4 Group Booking ................................................................................................................. 241
7.5 Update User Information ............................................................................................... 242
7.6 Update User Supervisors ............................................................................................... 243
7.7 Data Report and Invoice ................................................................................................. 245
7.8 Batch Data Report ............................................................................................................ 245
7.9 Manage Account Budget ............................................................................................... 248
7.10 User Training & Certification ......................................................................................... 249
7.11 Register Forms and Documents ..................................................................................... 251
7.12 Track Training & Support Requests .............................................................................. 254
7.13 Track Samples ................................................................................................................ 254
7.14 ACLS Tracker ................................................................................................................ 256
7.15 LDAP ............................................................................................................................. 257
7.16 Conduct Surveys ............................................................................................................ 257
7.17 General .......................................................................................................................... 258

## 8 Future Development

8.1 Standard Packages .......................................................................................................... 265
8.2 Research Equipment Management System (REMS) .................................................... 265

## 9 Appendix A – Modification for ANFF

9.1 Modification for MCN ..................................................................................................... 267
9.2 Modification for ANFF WA Node ................................................................................... 301
9.3 Modification for ANFF QLD Node .................................................................................. 303

## 10 Appendix B – Modification for IHMRI

10.1 Background .................................................................................................................... 318
10.2 2018 Requested Changes ............................................................................................ 319
10.3 How to Set Up Incident Category.................................................................................. 322
10.4 How to Report an Incident (System Administrator Only) ............................................. 322
10.5 How to Respond to an Incident .................................................................................... 323
10.6 How to Search for an Incident ...................................................................................... 325
10.7 How to Make Scheduled Maintenance & Unscheduled Service Bookings .................. 326
10.8 Contract Reminder Alert ............................................................................................... 332
10.9 Search Contract ............................................................................................................. 332
10.10 Access to Resource Lifespan ....................................................................................... 332
10.11 Finance Report ............................................................................................................. 333
10.12 Booking Report ............................................................................................................ 334
10.13 Set Up Unit Responsible .............................................................................................. 335
10.14 Set Up User Theme ...................................................................................................... 336
10.15 FAQ ............................................................................................................................... 337

## 11 Appendix C – Modification for IFM

11.1 Define Business Hours ................................................................................................. 339
11.2 Set Up Technical Manager Group and Security Officer Group .................................... 339
11.3 Set Certificate Expiry Control ...................................................................................... 339
11.4 Booking Summary View .............................................................................................. 340
11.5 Approve Out-of-Hours Bookings on My Attention ...................................................... 341
11.6  Account Owners ................................................................. 341
11.7  Account Owner Invoices ...................................................... 342
11.8  High charge bookings ............................................................ 344
11.9  Risk Level ........................................................................ 346
11.10 Display Booking Risk Level .................................................. 346
11.11 Display Risk Level in Security View ....................................... 347
11.12 FAQ .............................................................................. 348

12  Appendix D - Modification for CSIRO ........................................... 349
12.1  Step 1: Set up Charge Category ............................................ 349
12.2  Step 2: Set up Charge Category vs Type of Researcher .......... 349
12.3  Step 3: Set up Charge Category for each resource ................. 349
12.4  Step 4: Set up Charge Category vs Resource for each user ....... 349

13  Appendix E – Modification for OSLO ........................................... 351
13.1  To Set Up Microscopy Type .................................................. 352
13.2  To Set Up Charge Category ................................................... 352
13.3  Online Registration and User Profile .................................... 352
13.4  Booking Calendar ............................................................... 353
13.5  To Set Up Charge Rate ......................................................... 354
13.6  Report ............................................................................ 355
13.7  Invoice ............................................................................ 355

14  Appendix F – Modification for CMCA ........................................ 357
14.1  2018 Requested Changes ...................................................... 357
14.2  2020 Requested Changes ...................................................... 375

15  Appendix G – Modification for UTS ........................................... 388
15.1  User Profile Manager ............................................................ 388
15.2  Customised Resource Fields (Item 3) .................................... 388
15.3  Customised Resource Fields on Booking Form (Item 3) .......... 390
15.4  Customised Resource Fields on Report (Item 4) .................... 390

16  Appendix H – ACLS Python Tracker ........................................ 392
16.1  Working Mechanism of Tracker with ACLS Server ................. 392
16.2  Tracker Operation .............................................................. 392
16.3  Tracker Configuration in ACLS Web Portal ......................... 398
16.4  ACLS Tracker Status ......................................................... 400
16.5  ACLS Poster .................................................................. 400
16.6  ACLS Tracker Server ........................................................ 401
16.7  Automatically setting up user folders with ACLS Tracker ....... 401
16.8  ACLS Sensor: keeping track of user folders ......................... 403
16.9  ACLS Tracker Installation: Windows XP/7/8/10 ..................... 405
16.10 Disable Task Manager for Windows 7 and Windows 10 ......... 407
16.11 ACLS Tracker for Linux ...................................................... 408
16.12 Troubleshooting ............................................................... 409

17  Appendix I – Data Drive Connection through ACLS Tracker (UNSW) ........................................ 410

18  Appendix J – About LDAP Implementation ................................ 413

19  Appendix K – Single Sign-In Portal (SSI) ................................... 415
19.1 SSI Prerequisites ............................................................................................................ 416
19.2 Deploy SSI ...................................................................................................................... 416
19.3 SSI Working Examples ................................................................................................... 417
19.4 Enable SSI for ACLS Node ............................................................................................. 418
19.5 Catalogue Resources ...................................................................................................... 418
19.6 Organisation Charts ........................................................................................................ 419

20 Appendix L – Central Finance Integration ........................................................................ 421

21 Appendix M – WHS Document Manager (UNSW Medicine) ........................................... 425
1 Introduction

Mark Wainwright Analytical Centre proudly presents the AC Lab System (ACLS): a web-based laboratory resource booking system (Booking capabilities include operation, user, training, commercial and service bookings), sample tracking, training certification, incident reporting, support ticketing, induction process, survey creator, data analytical tools, QR codes, consumable tracking, publication registry, video and information management system. ACLS is modular in design, making it flexible and customisable. Users have the ability to access a wide range of resource 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), or through AAF. As a user of ACLS you will be able to achieve:

- Online registration and activation
- Online registration pathway
- Project-based, account-based or resource-based billing scheme
- Option to collect either booking data or usage data through ACLS tracker 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
- Dynamic booking confirmation email with activation URL 24 hours prior to the booking time
- Linked resource calendars
- Multiple group sample tracking and reporting
- Email message broadcasts to user groups, staff groups, certificate groups and all supervisors
- Data reports and invoices (batch mode and individual-run mode)
- Incident report and tracking
- Training and support ticketing system
- Survey creator
- Publication analyser
- ACLS iPhone and Android app
- Resource catalogue
- Laboratory doc access and administration
- Video access and administration
- Customised induction process
- Consumable library, order and tracking
- QR code implementation so smart phones can be used to scan, access information, login to make bookings and record consumable usages
1.1 Version Series

The latest web version is SQL 2.36.x

1.2 Internet Browsers

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

<table>
<thead>
<tr>
<th>Edge</th>
<th>Firefox</th>
<th>Safari</th>
<th>Chrome</th>
</tr>
</thead>
</table>

1.3 Customer Support

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

1.4 Terminology

Over years, facility/tool is used to define the equipment, items. From 2018, resource is used to replace facility and tool in the ACLS. Through the guide, both facility and resource are equivalent in use.
2 System Installation

ACLS offers multiple applications:

- Web portal and application (mobile browser friendly), comprised of HTML codes, java scripts and PHP scripts for the web application, executive programs
- World first web-based ACLS tracker built with Python
- Smart Phone applications: iPhone and Android app

2.1 System Requirements

2.1.1 Server Hardware

The minimum hardware requirements are:

<table>
<thead>
<tr>
<th>CPU:</th>
<th>Memory:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical server: Intel i7 or above</td>
<td>Min. 8GB</td>
</tr>
<tr>
<td>VM: 4 cores/CPU, 2 CPU</td>
<td></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 2012 standard/enterprise (64 bit)</td>
</tr>
<tr>
<td>Windows Server 2016 standard/enterprise (64 bit)</td>
</tr>
<tr>
<td>Windows Server 2019 standard/enterprise (64 bit)</td>
</tr>
</tbody>
</table>
2.2 System Installation

The order of installation for ACLS is:

- Web server
- PHP engine
- PostgreSQL engine
- System server

2.2.1 Web Engine

ACLS web portal certifies the Abyss Web Server X1 for web service, to deploy ACLS tracker app, Abyss Web Server X2 is required.

To install and configure ACLS, please refer to ACLS Installation Guides (provided on request).

2.2.2 Database Engine

ACLS runs on PostgreSQL 9.4 or the latest. To install and configure the SQL engine, please refer to ACLS site at http://www.analytical.unsw.edu.au/for-users/ac-lab-system.

2.2.3 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.
- Executes Training Certificate validation process.
- 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 ACLS Tracker

ACLS Tracker app is executed on resource computers. The tracker is written in Python and packaged for Windows OS and Linux distributions (CENTOS, UBUNTU).

Display last login user featured on tracker login page. By default, ACLS enables to show the last login user name, school or organisation, and login day.

The installation and operation of ACLS Tracker refers to Appendix H – ACLS Python Tracker
2.4 Cyber security protection - XSS (Cross Site Scripting) vulnerability

The XSS protection scripts are implemented to protect against XSS attacks on all forms in ACLS.
3 Getting Started

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

3.1 Navigating ACLS

You are able to navigate ACLS easily through two interactive menus: horizontal menu for major function access depending on access group, and vertical menu for individual function access on the left of the screen, click-expand and click-hide for sub-menus. The following snapshot is for admin view.

- Dashboard tab

- Booking tab

- My Calendar
- Lab and holiday calendar
- Staff Roster Calendar
- Resource Trainers
- Resource Timeline Calendar
- My Bookable Resources
  - AFM
  - FIB
  - SEM
  - TEM
  - TOOLS
**Getting Started**

- **Staff tab**
  - **User Profile**
    - *Report Manager*
    - *Invoice Manager*
    - *Utility Manager*
    - *Consumable Manager*
    - *System Wizards*
    - *System Settings*
3.2 Selecting the Business Model

Prior to commencing using ACLS, you must consider which business model you will use to establish your laboratory for cost recovery. 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 resource 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.

3.2.2 Account-Based (commonly used)

The account-based model calculates the rates according to the 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 Resource (Instrument)-Based (commonly used)

The resource-based model ties the actual billing to the resource charging rate rather than the account rate or project rate.

For further information, refer to the Operating ACLS chapter.

3.3 Resource Multi-Dimension Charging Model

The implemented multi-dimension usage covers 3 dimensions:

- Resource
- Charge category
Getting Started

- User

Define the charge rate with resource vs charge category
Define the matrix of user vs (resource vs category)
Charge rate table example

<table>
<thead>
<tr>
<th>Resource</th>
<th>Charge Category</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Student</td>
</tr>
<tr>
<td>TEM CM200</td>
<td>$10/hour</td>
</tr>
<tr>
<td>SEM 450</td>
<td>$8/hour</td>
</tr>
<tr>
<td>SEM 230</td>
<td>$8/hour</td>
</tr>
<tr>
<td>Zeiss Lightsheet</td>
<td>$20/hour</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User</th>
<th>Resource</th>
<th>Charge Category</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Student</td>
<td>Academic</td>
</tr>
<tr>
<td>David</td>
<td>TEM CM200</td>
<td>$10/hour</td>
</tr>
<tr>
<td>Cook</td>
<td>SEM 450</td>
<td>$8/hour</td>
</tr>
<tr>
<td></td>
<td>SEM 230</td>
<td>$8/hour</td>
</tr>
<tr>
<td></td>
<td>Zeiss Lightsheet</td>
<td>$20/hour</td>
</tr>
<tr>
<td>Owen</td>
<td>TEM CM200</td>
<td>$50/hour</td>
</tr>
<tr>
<td>Crowe</td>
<td>SEM 450</td>
<td>$1/hour</td>
</tr>
<tr>
<td></td>
<td>SEM 230</td>
<td>$50/hour</td>
</tr>
<tr>
<td></td>
<td>Zeiss Lightsheet</td>
<td>$100/hour</td>
</tr>
</tbody>
</table>

3.3.1 Indicative diagram for multi-charge rate method

3.3.2 How could we enable multi-charge rate method?

Only system administrator can enable this method.

Go to System Setting -> Configure System -> Parameter -> EnableChargeCategoryManager, tick the checkbox and accept.

3.3.3 How could we set up charge category?

Go to Staff tab -> Utility -> Charge Category Manager to set up.
3.3.4 How could we set up charge rate with resource vs charge category?

Go to Staff tab -> Utility -> Resource Manager -> Booking Resources, edit the resource profile.
On resource profile -> Charge Category, enter the charge rate accordingly.

![Charge Category Table]

### 3.3.5 How could we set up charge method to user profile?

Go to **Staff tab -> User Profile -> User Profile Manager**, find and edit **user profile -> charge category** tab.
Getting Started

Select charge category for the resource and save, this could be a time consuming job for the very first time if you have a large number of resources and users.

<table>
<thead>
<tr>
<th>Resource</th>
<th>Commercial</th>
<th>Research academic</th>
<th>Internal</th>
<th>Precinct</th>
<th>SAHMRI co-contributor</th>
<th>...</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAHM...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAHM...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAHM...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAHM...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAHM...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAHM...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

There are two functions on this page: list user selected resource/category, and edit/select resource vs category.
3.3.6 **About multi-dimension charge method for report**

ACLS calculates the multi-dimension charges for all reports, including batch report.

3.3.7 **About multi-dimension charge method for invoice**

ACLS calculates the multi-dimension charges for individual invoice and batch report.
3.3.8 **Resource vs User Category-Based (ANFF MCN Customization)**

Branching the same method, a special modification for ANFF MCN is implemented. Please refer to **Appendix A** for details.

3.4 **Authentication Access**

There is a pre-defined accessing policy for each function as follows:
# Getting Started

## Authentication Groups

<table>
<thead>
<tr>
<th>Authentication Groups</th>
<th>Dashboard</th>
<th>Booking</th>
<th>Resource Status</th>
<th>Report Manager</th>
<th>Invoice Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration Staff</td>
<td>Full Access</td>
<td>Full Access</td>
<td>Full Access</td>
<td>Full Access except for batch data report and sample tracking report</td>
<td>Full Access</td>
</tr>
<tr>
<td>Management Staff</td>
<td>Full Access</td>
<td>Full Access</td>
<td>Full Access</td>
<td>Full Access except for batch data report and sample tracking report</td>
<td>Full Access</td>
</tr>
<tr>
<td>Equipment Supervisor</td>
<td>Full Access</td>
<td>Full Access</td>
<td>Full Access</td>
<td>Access to user’s own booking and log data</td>
<td>No Access</td>
</tr>
<tr>
<td>General Staff</td>
<td>Full Access</td>
<td>Full Access</td>
<td>Full Access</td>
<td>Access to user’s own booking and log data</td>
<td>No Access</td>
</tr>
</tbody>
</table>

## Overview

The AC LAB SYSTEM 24 provides a range of access levels for different user groups to manage access to various features such as the Dashboard, Booking, Resource Status, Report Manager, and Invoice Manager. Each group has specific access rights as detailed in the table above.
### Getting Started

<table>
<thead>
<tr>
<th>User Supervisors</th>
<th>No Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard users</td>
<td>No Access</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Authentication Groups</strong></th>
<th><strong>User Profile</strong></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 have no power to approve a new registration</td>
</tr>
<tr>
<td>General Staff</td>
<td>Full Access except have no power to approve a 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>No access except of My Profile</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Authentication Groups</strong></th>
<th><strong>Track Samples</strong></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>

<table>
<thead>
<tr>
<th><strong>Authentication Groups</strong></th>
<th><strong>Staff</strong></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>

<table>
<thead>
<tr>
<th><strong>Authentication Groups</strong></th>
<th><strong>Survey</strong></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>
### Authentication Groups

<table>
<thead>
<tr>
<th>Authentication Groups</th>
<th>Resource 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>

<table>
<thead>
<tr>
<th>Authentication Groups</th>
<th>Consumables</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</td>
</tr>
<tr>
<td>General Staff</td>
<td>Limited Access</td>
</tr>
<tr>
<td>User Supervisors</td>
<td>Shopping only</td>
</tr>
<tr>
<td>Standard users</td>
<td>Shopping only</td>
</tr>
</tbody>
</table>
4 Registration

4.1 Select Login Name

ACLS provides three (4) 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
- AAF via ACLS SSI (Refer to Appendix M)

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 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 Python tracker installed on resource computers without being linked to a project.

### 4.2.2 Account/Resource-Based

The account/resource-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, go to **Account** tab, **Edit User Accounts** to make the account selection.

When you select **Edit 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.

<table>
<thead>
<tr>
<th>Email Address</th>
<th>Status</th>
<th>Established Date</th>
<th>Last Login</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:wilmington@abc.com">wilmington@abc.com</a></td>
<td>Active</td>
<td>2023-01-01</td>
<td>2023-01-05</td>
<td>Details</td>
</tr>
<tr>
<td><a href="mailto:john.doe@abc.com">john.doe@abc.com</a></td>
<td>Active</td>
<td>2023-02-01</td>
<td>2023-02-05</td>
<td>Details</td>
</tr>
</tbody>
</table>

### 4.3 Register Users Online

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

- **User data entry**

  ![User data entry form]

  - Name
  - Email
  - Password
  - Confirm Password
  - Terms and Conditions
  - School/Org
  - Supervisor

- **Terms and Conditions Compliance**

  ![Terms and Conditions compliance]

  - Yes
  - No

  You must agree to the terms and conditions to continue.

- **School/Org selection/entry**

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

  ![School/Org selection]

  - Select from list
  - Enter school/organization name

- **Supervisor selection/entry**

  ![Supervisor selection]

  - Select from list
  - Enter supervisor name
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 3-4 char fields are required to be entered. If it is external, then no further details need to be provided at this stage.

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal</td>
<td>Requires account details</td>
</tr>
<tr>
<td>External</td>
<td>No further details needed</td>
</tr>
</tbody>
</table>

- **Resource of interest (optional)**

Depending on the online resource registration setting in **Resource Manager**, users can select the resource 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. Each registration comes with a unique reference number for future reference.

• Approve online registration

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

• Auto-approve online registration

Some labs prefer having an auto-approving mechanism to ease the pain of user waiting for approval and reduce the admin work load. In response to the needs, ACLS provides an auto-approving mechanism which applies to the local organization users only. For example, for ACLS deployed at UNSW, UNSW user registration feeds through the auto-approving
process; for non-UNSW users, the registration process remains unchanged so lab admin needs to manually approve the non-UNSW user registration.

The auto-approving user registration only works when it meets the following conditions.

- Enable auto-approving function through system settings by system administrator
- ACLS connected to organization ID system via LDAP

The auto-approving process is illustrated as below. The current registration form wizard will stay unchanged except for the last step when users submit the form. Taking UNSW for an example.

For system administrator, 2 global parameters are required to set up for auto-approving.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>EnableRegAutoApproval</td>
<td>If enabled, auto-approving process is ON.</td>
</tr>
<tr>
<td>OrgRegName</td>
<td>Organisation name for registration form, for example, UNSW</td>
</tr>
</tbody>
</table>

On the page 1 of registration form, a selection panel is added to ask users if he is local org user or if he is not.

At the end of registration, if the user is UNSW staff or student (for example), ACLS pops up the sign in for credential confirmation before granting the access to the system.
4.4 Register Supervisors

A supervisor can be registered through Supervisor Manager.
4.5 Login to ACLS

Enter your login email and password and click on Login.

Upon login, you will see the Booking Tab page.

4.6 Reset Password

Users are able to reset password at login page. Upon providing the email address, ACLS sends the reset password notice with reset URL.

Upon receiving the password reset email, you can enter the reset code and new password to reset.

Email looks like:

Dear Dong Zheng,
You have asked to reset your password associated with this email address (dm.zheng@unsw.edu.au).

Please enter the reset code directly into the password page: Reset code: ACLS: SZGJHmHLkCrULig0h9KY7vqXdrti6j

Kind regards.
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 out as required for your operations. Normally, ACLS is compiled and deployed 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>AccessPortalURL</td>
<td>Single Sign-In Portal</td>
<td>Refer to Appendix K</td>
</tr>
<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>, CGIDirectory 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:\emudata”, DataDirectory should be “d:\emudata”.</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:\emudata\doc”; Doc Directory Name 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:\emudata\doc”, Doc Web Directory Name 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:\emudata\pictures”, Pictures Directory Name 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:\emudata\pictures”, Pictures Web Directory Name should be “pictures”.</td>
</tr>
<tr>
<td>Users Directory</td>
<td></td>
<td><strong>No longer in use</strong></td>
</tr>
<tr>
<td>Email Data Date</td>
<td>For information only.</td>
<td>Email server program updates the date to current date on daily basis; if not, ACLS may have a corrupted database.</td>
</tr>
</tbody>
</table>
## Configuring ACLS

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>System Pass Date</strong></td>
<td>No longer in use</td>
</tr>
<tr>
<td><strong>Tracing Data Date</strong></td>
<td>No longer in use</td>
</tr>
<tr>
<td><strong>Active Users For Training Booking</strong></td>
<td>User selection list for training bookings.</td>
</tr>
<tr>
<td></td>
<td>- Show all users in selection list for training bookings</td>
</tr>
<tr>
<td></td>
<td>- Show active users only in selection list for training bookings</td>
</tr>
<tr>
<td><strong>Booking Calendar Staff Only</strong></td>
<td>Enable/Disable booking calendar to users.</td>
</tr>
<tr>
<td></td>
<td>- Enable booking calendar to all (users and staff)</td>
</tr>
<tr>
<td></td>
<td>- Enable booking calendar to staff only. This is the default.</td>
</tr>
<tr>
<td><strong>Booking Display All</strong></td>
<td>Show all resources or per resource group.</td>
</tr>
<tr>
<td></td>
<td>- Show resource selection list per resource group</td>
</tr>
<tr>
<td></td>
<td>- Show all resources in one selection list</td>
</tr>
<tr>
<td><strong>Booking Only</strong></td>
<td>Switch ACLS reporting between usage data collected through ACLS console and booking data.</td>
</tr>
<tr>
<td></td>
<td>- Usage data through logon console</td>
</tr>
<tr>
<td></td>
<td>- Booking only</td>
</tr>
<tr>
<td><strong>Calendar Multiple Days</strong></td>
<td>Show multiple day event on calendar.</td>
</tr>
<tr>
<td></td>
<td>- Show multiple day events through the separate top row of the calendar</td>
</tr>
<tr>
<td></td>
<td>- Show multiple day events through the time continuously. This is the default.</td>
</tr>
<tr>
<td><strong>Clear Browser Cache</strong></td>
<td>Add the html page header to stop browser cache.</td>
</tr>
<tr>
<td></td>
<td>- Does nothing on cache</td>
</tr>
<tr>
<td></td>
<td>- Add special cache header to stop browser cache. This is the default.</td>
</tr>
<tr>
<td><strong>Console Next Booking Update</strong></td>
<td>No longer in use</td>
</tr>
<tr>
<td><strong>Console Notification</strong></td>
<td>No longer in use</td>
</tr>
<tr>
<td><strong>Data Storage Ctrl</strong></td>
<td>No longer in use</td>
</tr>
<tr>
<td><strong>Enable AAF Sign In</strong></td>
<td>Enable/disable AAF sign in through ACLS Single sign in which connects to AAF (Australia Access Federation)</td>
</tr>
<tr>
<td></td>
<td>- Disable</td>
</tr>
<tr>
<td></td>
<td>- Enable</td>
</tr>
<tr>
<td><strong>Enable Account Exception Alert</strong></td>
<td>Enable/disable organisation GLC or account exception alerts if organisation account feature is enabled. This works only when SSI is enabled for organisation GLC or account feature is enabled</td>
</tr>
<tr>
<td></td>
<td>- Disable</td>
</tr>
<tr>
<td></td>
<td>- Enable</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Enable Account Select For Booking</td>
<td>Enable/disable account selection for operation booking calendar and timeline booking calendar. Default is disabled. If enabled, users must select account even if they have one account.</td>
</tr>
<tr>
<td>Enable Active Users for Job Reg</td>
<td>If enabled, user selection for sample job reg shows active users. If disabled, user selection for sample job reg shows all users.</td>
</tr>
<tr>
<td>Enable Admin Timeline Calendar</td>
<td>Enable/disable timeline calendar for admin to change any bookings on resource timeline calendar</td>
</tr>
<tr>
<td>Enable Android App</td>
<td>Show Android app information link on login page if enabled.</td>
</tr>
<tr>
<td>Enable Banner for Login</td>
<td>Enable/disable banner image on login page. By default, system uses the built-in header.</td>
</tr>
<tr>
<td>Enable Built In Sign In Page</td>
<td>Enable/disable book.dll sign in or index.php sign in</td>
</tr>
<tr>
<td>Enable Charge Category Manager</td>
<td>Enable/disable resource charge category method, refer to resource charge category chapter for details</td>
</tr>
<tr>
<td>Enable Charge Rate On Calendar</td>
<td>Enable/disable resource charge rate show on calendar pages</td>
</tr>
<tr>
<td>Enable Consumable Module</td>
<td>Enable/disable consumable module used for managing consumable store and ordering consumables</td>
</tr>
<tr>
<td>Enable Consumable Order Qty Validation</td>
<td>Enable/disable consumable order quantity validation against stock quantity. If stock quantity is less than the ordered quantity, then order is rejected.</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Enable Consumable Stock Email Alert</td>
<td>Enable/disable consumable stock email alert to admin staff once a day. The default setting is enabled.</td>
</tr>
<tr>
<td>Enable Consumable Stock Update upon Delivery</td>
<td>Enable/disable consumable stock quantity update upon delivery. If enabled, stock quantity is updated when the delivery is marked as delivered. If disabled, stock quantity is not updated against the consumable order.</td>
</tr>
<tr>
<td>Enable Consumable Stock Zero</td>
<td>Enable/disable consumable stock quantity running into the negative value. If enabled, when the stock quantity reaches negative value, the stock quantity stays zero. The default setting is disabled.</td>
</tr>
<tr>
<td>Enable Corea Analytics</td>
<td>Enable/disable Corea analytics feature</td>
</tr>
<tr>
<td>Enable Create User Folder</td>
<td>Enable/disable user folder creation with tracker</td>
</tr>
<tr>
<td>Enable Current Hour Booking Change</td>
<td>Enable/disable event change permission in the current hour.</td>
</tr>
<tr>
<td>Enable Default Account</td>
<td>Enable/disable default account for the tracker login</td>
</tr>
<tr>
<td>Enable Email Server Alert</td>
<td>Enable/disable pop up alert message upon system administrator login</td>
</tr>
<tr>
<td>Enable Resource Catalogue</td>
<td>Enable/disable resource catalogue feature</td>
</tr>
<tr>
<td>Enable Resource Status</td>
<td>Enable/disable resource status page. Only applies when setting “Booking Only” to ON.</td>
</tr>
</tbody>
</table>
## Configuring ACLS

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
<th>Default Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enable Resource Status Privacy</strong></td>
<td>Enable/disable user photo on status page.</td>
<td>Disable user photo display when users access the resource status page. Only staff can view photos. Enable user photos display.</td>
</tr>
<tr>
<td><strong>Enable Help Link</strong></td>
<td>No longer in use.</td>
<td></td>
</tr>
<tr>
<td><strong>Enable Induction Process</strong></td>
<td>Enable/disable induction process. The default setting is enabled.</td>
<td>Disable/Enable</td>
</tr>
<tr>
<td><strong>Enable Invoice Manager</strong></td>
<td>Enable/disable invoice manager. The default setting is enabled.</td>
<td>Disable/Enable</td>
</tr>
<tr>
<td><strong>Enable iPhone App</strong></td>
<td>Enable/disable iPhone app indication icon on login page</td>
<td>Disable/Enable</td>
</tr>
<tr>
<td><strong>Enable Labcast</strong></td>
<td>Enable/disable labcast feature in ACLS to cast live calendar via labcast service powered by UniLab</td>
<td>Disable/Enable</td>
</tr>
<tr>
<td><strong>Enable Mail To User For User Booking</strong></td>
<td>Enable/disable mail to user checkbox for user booking calendar. If enabled, upon saving the bookings, system sends the email notifications to the booked users</td>
<td>Disable/Enable</td>
</tr>
<tr>
<td><strong>Enable My Data</strong></td>
<td>Enable/disable data cluster connection to nextcloud service or FTP service (UNSW only)</td>
<td>Disable/Enable</td>
</tr>
<tr>
<td><strong>Enable Nextcloud</strong></td>
<td>No longer in use.</td>
<td></td>
</tr>
<tr>
<td><strong>Enable Online Reg Project</strong></td>
<td>Enable/disable project field in online reg form.</td>
<td>Disable/Enable</td>
</tr>
<tr>
<td><strong>Enable Online User Password Reset</strong></td>
<td>Enable/disable reset password</td>
<td>Disable/Enable</td>
</tr>
<tr>
<td><strong>Enable Order Consumable Login</strong></td>
<td>Enable/disable consumable order logo on login page</td>
<td>Disable/Enable</td>
</tr>
<tr>
<td><strong>Enable Org Master Account</strong></td>
<td>Enable/disable the organisation GLC or account validation feature</td>
<td>Disable/Enable</td>
</tr>
<tr>
<td><strong>Enable Org Master Account For Reg</strong></td>
<td>Enable/disable the organisation GLC or account validation feature for user reg. The default setting is disabled.</td>
<td>Disable/Enable</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Default Status</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Enable Outlook Calendar Export</td>
<td>Enable/disable outlook calendar export for My Calendar data, or selected resource calendar data (staff only) to ics URL. So users and staff can add the ACLS calendars to Outlook calendar</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td>Enable Privacy Calendar</td>
<td>Enable/disable the booking details on the public access calendar</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td>Enable Publication</td>
<td>Enable/disable the publication data feature. The default setting is enabled.</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td>Enable Public Calendar</td>
<td>Enable/disable the public access calendar without the need of login</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td><strong>Enable Q&amp;A Search</strong></td>
<td>No longer in use</td>
<td></td>
</tr>
<tr>
<td>Enable Reactivation Page</td>
<td>Enable/disable the reactivation link on login page</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td>Enable Reg Auto Approval</td>
<td>Enable/disable auto approval for local organisation user reg application provided that LDAP is enabled to validate the user ID and pass against the organisation ID service</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td>Enable Reg Pathway</td>
<td>Enable/disable the pathway for online reg process</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td>Enable Reg Project Compulsory</td>
<td>Enable/disable the project field in the reg form as compulsory entry or not</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td>Enable Repeat Booking</td>
<td>Enable/disable repeat booking feature for Facility Booking Tool</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td>Enable Resource Data</td>
<td>Enable/disable resource tile in My Data</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td>Enable Resource Field Customisation</td>
<td>Enable/disable resource database field customisation</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td>Enable Sample Details In Report</td>
<td>Enable/disable sample details in the sample report</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Default Status</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td><strong>Enable Sample Job Alert</strong></td>
<td>Enable/disable sample job overdue alert. System does checks once a day</td>
<td>Disable</td>
</tr>
<tr>
<td><strong>Enable Scan Certificate Script Notification</strong></td>
<td>No longer in use.</td>
<td></td>
</tr>
<tr>
<td><strong>Enable Session Hour Check</strong></td>
<td>Enable/disable min booking unit check for each event.</td>
<td>Disable</td>
</tr>
<tr>
<td><strong>Enable Single Sign-In</strong></td>
<td>Enable/disable Single Sign-In mode. If enabled, users can only access ACLS via SSI</td>
<td>Disable</td>
</tr>
<tr>
<td><strong>Enable Space Booking</strong></td>
<td>Enable/disable space booking feature in response to COVID-19</td>
<td>Disable</td>
</tr>
<tr>
<td><strong>Enable Staff Calendar</strong></td>
<td>Enable/disable staff calendar. By default, it is disabled</td>
<td>Disable</td>
</tr>
<tr>
<td><strong>Enable Staff Roster Notification</strong></td>
<td>Enable/disable staff roster booking change email notification. By default, it is disabled</td>
<td>Disable</td>
</tr>
<tr>
<td><strong>Enable Subscription Credits</strong></td>
<td>Not implemented yet</td>
<td></td>
</tr>
<tr>
<td><strong>Enable Survey</strong></td>
<td>Enable/disable survey module.</td>
<td>Disable</td>
</tr>
<tr>
<td><strong>Enable Term Condition</strong></td>
<td>Enable/disable term and conditions display at footer and on dashboard menu</td>
<td>Disable</td>
</tr>
<tr>
<td><strong>Enable Timeline Calendar</strong></td>
<td>Enable/disable timeline calendar. The default setting is enabled.</td>
<td>Disable</td>
</tr>
<tr>
<td><strong>Enable Title For Login</strong></td>
<td>Enable/disable Title bar on login page</td>
<td>Disable</td>
</tr>
<tr>
<td><strong>Enable Track Samples</strong></td>
<td>Enable/disable Track Sample module</td>
<td>Disable</td>
</tr>
<tr>
<td><strong>Enable User Booking Confirmation</strong></td>
<td>Enable/disable booking confirmation alerts to users a few days before the booking time. Users can confirm the booking or cancel the booking</td>
<td>Disable</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Default Status</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Enable User Portrait Photo</td>
<td>Enable/disable user portrait photo in user profile. This does not refer to thumbnail user photo.</td>
<td>Enable/Disable</td>
</tr>
<tr>
<td>Enable User Privacy Calendar</td>
<td>Enable/disable booking details on calendar for privacy. Users can only see his own booking details, for the others, just marked as busy</td>
<td>Enable/Disable</td>
</tr>
<tr>
<td>Enable WHS Document</td>
<td>UNSW only for WHS document feature in conjunction with single sign in portal</td>
<td>Enable/Disable</td>
</tr>
<tr>
<td>Enable XNAT</td>
<td>UNSW only for M cloud data service connection. Enable/disable m-cloud connection.</td>
<td>Enable/Disable</td>
</tr>
<tr>
<td>Equipment Supervisor Consumable Access</td>
<td>Allow staff in equipment supervisor access category to access consumable library</td>
<td>Enable/Disable</td>
</tr>
<tr>
<td>EXCEL Password Protection</td>
<td>No longer in use</td>
<td></td>
</tr>
<tr>
<td>Resource Charging</td>
<td>Enable/disable resource charging policy in Resource Manager.</td>
<td>Enable/Disable</td>
</tr>
<tr>
<td>Resource Status Display All</td>
<td>If enabled, resource status shows all the resource status regardless of the other restrictions. It means that any users can see the full list of resource status.</td>
<td>Enable/Disable</td>
</tr>
<tr>
<td>Https Enable</td>
<td>Enable/Disable https access depending on the web server settings.</td>
<td>Enable/Disable</td>
</tr>
<tr>
<td>Include Consumable to Usage Invoice</td>
<td>Enable/Disable to include the consumable orders to the invoices. The default setting is enabled.</td>
<td>Enable/Disable</td>
</tr>
<tr>
<td>Invoice Accessible By Supervisor</td>
<td>Enable/disable supervisor access to the invoice statements.</td>
<td>Enable/Disable</td>
</tr>
<tr>
<td>LDAP Pre-Configure</td>
<td>Auto-run tool to configure the user access through LDAP.</td>
<td>ON/OFF</td>
</tr>
<tr>
<td>Logbook Manager To Staff</td>
<td>Enable/disable general staff access to data logbook manager function.</td>
<td>Enable/Disable</td>
</tr>
</tbody>
</table>
### Configuring ACLS

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Login Using Email</strong></td>
<td>Enable/disable email as login name.</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td><strong>Logon Server Check</strong></td>
<td>No longer in use</td>
<td></td>
</tr>
<tr>
<td><strong>Logon Timer Ctrl</strong></td>
<td>Enable/disable timer for tracker</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td><strong>Multiple Click Prevention</strong></td>
<td>Enable/disable multiple form submission through “Accept” button.</td>
<td>Disable, this is the default; Enable.</td>
</tr>
<tr>
<td><strong>Online Reg Ctrl</strong></td>
<td>Enable/disable online registration.</td>
<td>Disable, Enable</td>
</tr>
<tr>
<td><strong>Online Reg Visitor ID Compulsory</strong></td>
<td>Set Student/Staff ID as compulsory entry field in registration form.</td>
<td>Not compulsory; Compulsory</td>
</tr>
<tr>
<td><strong>Project Manager</strong></td>
<td>Enable/disable “Project Manager”.</td>
<td>Project manager is OFF; Project manager is ON</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>Set period between any two months; Set period between any two dates</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>No restrictions to staff with respect to making bookings; Staff can only make bookings if they are qualified as a trainer or being trained</td>
</tr>
<tr>
<td><strong>Show Logon Client Password</strong></td>
<td>No longer in use</td>
<td></td>
</tr>
<tr>
<td><strong>Show Tracker Hours in Report</strong></td>
<td>Display the tracker hours with the booking hours in the reports for comparison.</td>
<td>OFF; ON</td>
</tr>
<tr>
<td><strong>Show Video Clip Booking Tab Home</strong></td>
<td>Display video tile on the booking tab home page</td>
<td>OFF; ON</td>
</tr>
<tr>
<td><strong>Training Support Request</strong></td>
<td>Switching on/off the function on My Dashboard</td>
<td>OFF; ON</td>
</tr>
<tr>
<td><strong>User Account For Reg</strong></td>
<td>Enable/disable account entry in the online registration process.</td>
<td>Account entry not required; Account entry required</td>
</tr>
</tbody>
</table>
## Configuring ACLS

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
<th>Default Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>User All Account Search</td>
<td>Enable/disable the account search range in user profile manager</td>
<td><img src="image" alt="Disable" /> <img src="image" alt="Enable" /></td>
</tr>
<tr>
<td>User Photo Availability Check</td>
<td>Enable/disable user photo availability check.</td>
<td><img src="image" alt="No cross check on user photo availability. This is the default." /> <img src="image" alt="Checking against user photo availability. The system runs a regular check for user photo availability against the parameter “DeactivateIfNoPicturePeriod”. If the photo is not available as set out, the system deactivates the user access automatically." /></td>
</tr>
<tr>
<td>User Photo For Reg</td>
<td>Enable/disable user photo upload in the online registration process.</td>
<td><img src="image" alt="User photo not required" /> <img src="image" alt="User photo must be provided" /></td>
</tr>
<tr>
<td>Valid Email Login</td>
<td>Enable/disable login name validation check.</td>
<td><img src="image" alt="Validation not required" /> <img src="image" alt="Login name has to be numbers and letters" /></td>
</tr>
<tr>
<td>Web Access Validation</td>
<td>Enable/disable user certificate validation.</td>
<td><img src="image" alt="Disable" /> <img src="image" alt="Enable" /></td>
</tr>
<tr>
<td>LDAP Compulsory Check Text</td>
<td>Set the default text string for LDAP compulsory control</td>
<td>If set to 'unsw', the system checks user email contains 'unsw' to automatically switch on LDAP access control</td>
</tr>
<tr>
<td>LDAP Text on Login Page</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>Login Name Tip</td>
<td>Set the tip text for the login name field on login page</td>
<td>Default, welcome</td>
</tr>
<tr>
<td>Online Reg Visitor ID</td>
<td>Set as default external visitor ID</td>
<td>e.g. 000</td>
</tr>
<tr>
<td>Server Name</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>SMTP Server Name</td>
<td>The local SMTP server domain name of the organization</td>
<td>e.g. smtp.unsw.edu.au</td>
</tr>
<tr>
<td>Title Beg</td>
<td>System web page title</td>
<td></td>
</tr>
<tr>
<td>Title End</td>
<td>System web page title</td>
<td></td>
</tr>
<tr>
<td>Title To Resource Catalogue</td>
<td>Add additional title in the front of Resource Catalogue on booking landing page. For example, UNSW Resource Catalogue</td>
<td></td>
</tr>
</tbody>
</table>

**AC LAB SYSTEM**

46
### Configuring ACLS

<table>
<thead>
<tr>
<th>Configuration</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title To Show</strong></td>
<td>System title on logon page</td>
</tr>
<tr>
<td><strong>Commercial User Code</strong></td>
<td>Used for commercial booking</td>
</tr>
<tr>
<td><strong>Resource Status Image Height</strong></td>
<td>Set the resource image height</td>
</tr>
<tr>
<td></td>
<td>Height of resource image shown in resource info page is defined here</td>
</tr>
<tr>
<td><strong>Resource Status Image Width</strong></td>
<td>Set the resource image width</td>
</tr>
<tr>
<td></td>
<td>Width of resource image shown in resource info page is defined here</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>
</tr>
<tr>
<td><strong>Version Control</strong></td>
<td>This is for building ACLS used by ACLS developer</td>
</tr>
<tr>
<td><strong>FTP Host Name</strong></td>
<td><em>No longer in use</em></td>
</tr>
<tr>
<td><strong>FTP Login</strong></td>
<td>For record purpose</td>
</tr>
<tr>
<td><strong>FTP Password</strong></td>
<td>For record purpose</td>
</tr>
<tr>
<td><strong>Home Page Link</strong></td>
<td>Set home page URL at footer  If this is 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>
</tr>
<tr>
<td></td>
<td>If this is blank, privacy statement link is not available at footer</td>
</tr>
<tr>
<td><strong>ACLS Version</strong></td>
<td>For information</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</td>
</tr>
<tr>
<td><strong>Max Booking Form Number</strong></td>
<td>Limit for resource uploaded booking form</td>
</tr>
<tr>
<td></td>
<td>Max is 5</td>
</tr>
<tr>
<td><strong>mCloud User Guide URL</strong></td>
<td>UNSW only</td>
</tr>
<tr>
<td><strong>Moxy Sign In Token</strong></td>
<td>Refer to Moxy guide at moxy.unilab.com.au</td>
</tr>
<tr>
<td><strong>Moxy Sign In URL</strong></td>
<td>Refer to Moxy guide at moxy.unilab.com.au</td>
</tr>
<tr>
<td></td>
<td>Default sets to UNSW</td>
</tr>
<tr>
<td><strong>Org Reg Name</strong></td>
<td>Used for the button in Account Manager if organisation GLC or account validation feature is enabled</td>
</tr>
<tr>
<td></td>
<td>Default sets to UNSW</td>
</tr>
<tr>
<td><strong>Python Tracker Poster Menu</strong></td>
<td>Refer to ACLS tracker guide</td>
</tr>
<tr>
<td></td>
<td>Information only</td>
</tr>
<tr>
<td><strong>Staff Roster URL</strong></td>
<td>Refer to MoxyTouch user guide, Information only</td>
</tr>
<tr>
<td><strong>User Folder Format</strong></td>
<td>Refer to ACLS tracker guide, Information only</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>
</tr>
<tr>
<td></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>
</tr>
<tr>
<td></td>
<td>If blank, then this field entry is disabled</td>
</tr>
</tbody>
</table>
### Configuring ACLS

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reg Account Field 3</td>
<td>Used as account field for account entry in the online registration process. If blank, then this field entry is disabled</td>
<td></td>
</tr>
<tr>
<td>Reg Account Field 4</td>
<td>Used as account field for account entry in the online registration process. If blank, then this field entry is disabled</td>
<td></td>
</tr>
<tr>
<td>Adv Booking Reminder Day</td>
<td>Days for sending booking reminder out prior to the booked session time.</td>
<td>Default: 2 days</td>
</tr>
<tr>
<td>Data LogBook Back Days</td>
<td>Max back days for data logbook calendar.</td>
<td>Default: 360 days</td>
</tr>
<tr>
<td>Deactivate If No Access Period</td>
<td>Days for deactivating users if they have not used any resources.</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>Reg Copy Delete Days</td>
<td>After users save a temporary copy of the reg form, the form will be deleted in the days defined here (UWA modification only).</td>
<td>Default: 14 days</td>
</tr>
<tr>
<td>Default Reg Account</td>
<td>Default account used for approving user reg. Upon user reg approval, this account is automatically assigned to the user profile, information only.</td>
<td></td>
</tr>
<tr>
<td>Report Depth</td>
<td>Range of years for generating reports.</td>
<td>Default: 1 year</td>
</tr>
</tbody>
</table>
| Server Calendar Date Format   | The format should tally with the server time format in regional setting.                                                                                                                                     | Default: mm/dd/yyyy (US format), Australia: dd/mm/yyyy |}

### 5.2 Configure Resources

Resource in ACLS refers to instrument, equipment, tool, device, or anything you wish to book. Before starting to set up resources, you need to work out the resource grouping strategy. In other words, you need to set up groups for similar kinds or capabilities of resources.
5.2.1 **Resource Wizard:**

This guides you through a ‘one-stop’ process to set up resources, taking 4 steps to complete. Simply follow the process step by step to set up a new resource or change resource settings.

5.2.2 **Set Up Resource Group Ownership:**

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

ACLS supports up to 3 levels of resource group structures. Go to **Utilities -> Resource Manager -> Resource Group.**
Click on button “Update Ownership” to add or update the ownership. Owners of the resource can be chosen from or above the equipment supervisor category only. Now the owners can manage their own resources, trainers and certificates.

On booking page, multi-tier tree charts are presented.
5.2.3 **Resource Manager**

An experienced administrator can jump to *Resource Manager* to add/edit/archive a resource.

- Office/Lab Space & Resources
- Resource Groups
- Booking Resources
- Non-booking Resources
- Archived Resources
- Linked Booking Resources
- Printable Resource QR Codes
- Resource List for Registration
- Resource Tracker and Status
- Resource Tracker Home Drive
Resource Profiles:

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Name</td>
<td>Full name of resource</td>
</tr>
<tr>
<td>Resource Group</td>
<td>Resource group name</td>
</tr>
<tr>
<td>Resource Image</td>
<td>Resource image, one per resource</td>
</tr>
<tr>
<td>Resource QR Code</td>
<td>Resource QR code for smart phone to scan to access and make bookings</td>
</tr>
</tbody>
</table>
### Configuring ACLS

#### Operation Status

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Min Hours Per Session</td>
<td>Define the min time for each booking session. For example, if this is set to 2 hours, users have to book the session more than 2 hours or otherwise, system declines</td>
</tr>
<tr>
<td>Min Booking Unit</td>
<td>There are two options for calendar time scale unit, 15 minutes or 1 hour</td>
</tr>
<tr>
<td>Multiple Bookings At Same Time</td>
<td>If enabled, users can make bookings to the same time. This is useful for the special space booking.</td>
</tr>
<tr>
<td>Compulsory Booking Confirmation</td>
<td>If this setting is enabled, booking confirmation becomes compulsory for each booking made; if disabled, users are able to decide whether they want to have a booking confirmation for each booking made.</td>
</tr>
<tr>
<td>Booking Alert</td>
<td>Trainers receive the booking notice upon users make bookings if enabled</td>
</tr>
<tr>
<td>Training Certificate</td>
<td>Indicates whether the resource booking requires a user training certificate. For example, some resources do not require training to operate.</td>
</tr>
<tr>
<td>Pre-Approval Booking</td>
<td>If set this ON, resource bookings made by users are regarded as unapproved bookings subject to trainer/manager approval.</td>
</tr>
<tr>
<td>In-Progress Booking Change</td>
<td>If set this ON, users and staff can change the in-progress bookings. For example, the booking is 10am to 2pm, the current time is 12:15pm, then users can reduce the booking time from 10am to 12:15pm.</td>
</tr>
<tr>
<td>In-Progress Booking Cancel</td>
<td>If set this ON, users and staff can cancel the in-progress bookings. For example, the booking is 10am to 2pm, the current time is 12:15pm, then users can cancel the booking. This feature might be abused by users to cancel the bookings after they start to operate the tool or resource.</td>
</tr>
<tr>
<td>Booking Enable</td>
<td>Enable or disable resource availability for booking</td>
</tr>
</tbody>
</table>

- **Booking profile**

The resource settings are described as follows:

- **Lab space profile**

Lab space is a new feature to cope with COVID-19 outbreak so to set the limit of concurrent users or researchers in the lab space. You simply select or deselect the resource to the pre-defined lab space.

- **Catalogue profile**

The resource catalogue settings are described as follows:
### Configuring ACLS

#### Charge rates

This setting is subject to the global setting to enable resource charging method. Please refer to Resource Charging chapter for the further details.

#### Booking forms

This setting is subject to the global setting to enable booking forms. Please refer to Resource Booking Form for the further details.

#### Training certificates

Please refer to Resource Training Certificate chapter for the further details. You are able to add new training certificates and to edit the current certificates.

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Resource Type</strong></td>
<td>Following types are selectable. In the future, each type of resource has its own booking event template.</td>
</tr>
<tr>
<td>Research Equipment</td>
<td></td>
</tr>
<tr>
<td>Loan Item</td>
<td></td>
</tr>
<tr>
<td>Service</td>
<td></td>
</tr>
<tr>
<td>Meeting Room</td>
<td></td>
</tr>
<tr>
<td>Vehicle</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
</tr>
<tr>
<td><strong>Catalogue Access</strong></td>
<td>Catalogue access defines the access level by the following definitions.</td>
</tr>
<tr>
<td>Local</td>
<td></td>
</tr>
<tr>
<td>Organisation</td>
<td></td>
</tr>
<tr>
<td>Universe</td>
<td></td>
</tr>
<tr>
<td>Disable</td>
<td></td>
</tr>
<tr>
<td><strong>Item Number</strong></td>
<td>Resource asset item number in the university asset system</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Resource description</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>Resource location, for example, room number, building name</td>
</tr>
<tr>
<td><strong>Custodian</strong></td>
<td>Resource custodian</td>
</tr>
</tbody>
</table>

#### Add Certificate

- **Certificate: AFM CATALYST - AFTERHOURS**
- **Certificate: AFM CATALYST - GENERAL**
• **Trainers**

Please refer to Resource Trainer chapter for the further details. You are able to set up trainers here.

![User Profile Manager](image)

• **Certified users**

Certificated user list is available for reference checks.

<table>
<thead>
<tr>
<th>APM, Catalyst (Lowy)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certificate: APM CATALYST - AFTERHOURS</td>
</tr>
<tr>
<td>User List: Ying Zhao, <a href="mailto:ing.zhao@comerela.as">ing.zhao@comerela.as</a> (Active)</td>
</tr>
</tbody>
</table>

• **Python tracker**

The tab page sets up tracker controls. Please refer to **Appendix H – ACLS Python Tracker** for details.
### Configuring ACLS

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource</td>
<td>Resource installed with console</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>Host ID as resource ID.</td>
</tr>
<tr>
<td>Block hot-keys</td>
<td>Tracker blocks all Windows hot keys by default so users cannot bypass tracker with the Windows hot-keys</td>
</tr>
<tr>
<td>Block task manager</td>
<td>Block or unblock the Windows task manager so users cannot kill off tracker instance</td>
</tr>
<tr>
<td>Enable account/project selection</td>
<td>Enable/disable account/project selection. If resource is free of charges, you can disable this option for tracker.</td>
</tr>
<tr>
<td>Enable locking screen</td>
<td>Enable/disable locking screen feature. The locking screen is useful for users to tentatively lock up the screen while away for a short break. Staff members can unlock anytime.</td>
</tr>
<tr>
<td>Enable auto-logout</td>
<td>Enable/disable auto-logout. This feature is useful to prevent users forgetting logout tracker. When the pre-set time interval is reached, tracker logout automatically.</td>
</tr>
<tr>
<td>Connection Allowed</td>
<td>Enable/disable connection permission. If unchecked, server declines the tracker connection request</td>
</tr>
<tr>
<td>Note</td>
<td>Notes relating to the console settings.</td>
</tr>
</tbody>
</table>

### Resource Booking Forms:

Booking form might be used to record metadata of booking sessions while users make bookings. You are able to set up max up to 5 booking forms with the following entries. The forms can be set as optional to be completed and uploaded on the booking calendars.
For unapproved bookings, staff can validate the uploaded forms before granting the booking or decline.

On the booking calendar page, staff can access the booking forms anytime.
5.3 Customise Resource Fields

A new technique is used to add or remove the new fields for resources by yourself, basically, you can add new fields to a resource to suit your needs.

- **Step 1: Add new customised fields**

Go to Resource Manager, click on Customised Resource Fields to add new fields.

For new fields, you need to enter field name and length of field (max number of characters). Please use letter and digit for field name only.

Upon creating the new fields, you can delete them anytime if they are not in use for any bookings.

- **Step 2: Add customised fields to Resource**
You need to confirm if you want to set up new customized fields to any resources for its booking form or for its report respectively. If you don’t tick the relevant boxes, then the new customised fields won’t be effect to the resources.

This is all you need to do for adding customised fields.

- **Step3: Change the customised field order on popup booking window**

You are able to change the customised fields order on the form. Click on “Set Field Order on Booking Window” button to make the changes.

### 5.3.1 Customised Resource Fields on Booking Form

The customised fields will show up on the form depending the resource settings. Please note that all the customised fields are compulsory entry. Without the data entry, the bookings won’t be accepted.
5.3.2 Customised Resource Fields on Report

Go to Report Manager, a new report tile is added for the resources which have the customised fields enabled. By doing so, the standard reports remain unchanged.

ACLS shortlists the resource groups (that are enabled with the customized fields) for selection.
The monthly report example is shown here. You can export to EXCEL anytime.

Please note that vehicle charge capping is not implemented. You can export to excel for the further data process.

Reports by any periods are available for the customised field resources and resource groups.

5.4 Access Group Definition

The Access Group Manager defines the level of access. There are 7 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 check box 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

### 5.5 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
- Customized form type text file (CMCA only)

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

- Undergrad. Student
- Hons Student
- Visiting Researcher
5.6 Configure Email Receivers

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 **Contact Us** shown in the footer.

5.7 Configure Email Response Contents

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

Modified content is clearly identified, the rest are labelled as default. 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.
5.8 Configure Data Links (UNSW Only)

The objective of this function is to implement the future experiment data secured access and sharing (FTP is no longer supported). There are 5 functions as follows:

- **Set up data access:**

  Through this function, you can set up data access with mCloud service powered by @FileRun.

Go to **My Data** to access, the snapshots are available here. Please contact us if you wish to know more about this data management service integrated with ACLS.
ACLS + mCloud is mobile browser ready.

- Registration Link:

Labs might go with the PDF forms for online registration instead of the built-in ACLS reg forms. In this case, you can set up the external URL to point the registration to your own web page.
• Resource Link:
  
  • Labs may provide additional information about resources, status, maintenance plan and more on separate websites. You can make these available to users at every booking page and resource status page.

• Setting up is straightforward:
  
  • The external resource information is shown on Resource Status page.

• Net Drive:
  
  • This needs to work with the ACLS logon console program, which is installed on the resource (research equipment) computers. If you set this up, then when the user logs on to the resource computer, 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 Resource: No longer in use.
For further information on net drive configurations, please refer to *Appendix H.*

### 5.9 Configure School/Org Structure

ACLS supports 3 level school/org structure. For example, you can set up DVCR/MWAR/BMIF. By doing so, you are able to move to next step to deploy org structure diagram and analytical tools for user population and distribution.

You set up Univ A/Faculty B/School C, Univ A/Faculty B/School D, now you need to rename Faculty B to Faculty F, this change will apply to all in school manager.

To disable the unwanted school or org, you can click on Archive button any time.
6 Operating ACLS

6.1 Dashboard

Depending on your access group defined in your profile, Dashboard offers a wide range of information about your work and your profile in ACLS, and quick access to resource status and the other functions:

- **My Attention (Admin Only):**
  - User registration pending approval
  - Active user without account
  - Active account expiring within one month
  - Project expiring within one month

- **My Home:**
Operating ACLS

- Lab Events: shows the events in the current month, you can click on month link to view monthly events
- Access Documents: Access to general documents (policy, meeting minutes, etc.), and resource related documents (training materials, etc.)
- Access Forms: Access to user’s form, such as induction form, OHS form, etc.
- Access Experiment Data: Depending on ACLS configuration, you may be able to access the experiment data through the FTP service through the links
- Access Invoices
- Access Sample Job Reports
- Access Sample Job Summary

- My Profile:

My profile shows the full details of the login user profile. User can change password and update contacts. There are two ways to access My Profile, via Dashboard, or via user photo next to Logout.
My Publication:

For each lab, unit, facility and institute, publications are critical elements to support grant applications and to provide evidence of the excellence of the service.

An example of the publication data is shown on the registration form as below.

- Publication ID
- Journal Title
- Author List
- Year
- Month
- Details
Staff can register publications for any users. When done, you can see all your registered publications upon clicking on **Publication**.

- **Approve Bookings:**
  - Bookings pending approval provided that you enable the pre-approval booking setting
  - Available to trainer only

- **My Usage:**
  
  User can zoom in to the usage: booking and tracking. ACLS provides both usage summary in tables and bar charts.
6.2 My Calendar

My Calendar captures all the bookings of “mine” onto one calendar.

Staff members can view any user and staff booking calendar. All Staff Calendar shows all the staff bookings on one calendar, and for example, it can assist staff and managers to quickly identify free time for staff meetings.

All Service Calendar provides all the service bookings across all the resources on one calendar. You can also view single resource service bookings by selecting the resource from the dropdown list.
6.3 Make Bookings

Click on **Booking Tab** from the ACLS navigation menu, and the resource list shows up selections depending on your certification status. For general users, you see the resources that you are certified to access.

**Sorted by resource group:**

- My Calendar
- Lab and holiday calendar
- Staff Roster Calendar
- Resource Trainers
- Resource Timeline Calendar
- My Bookable Resources

**Sorted by individual resource:**
On the Booking Calendar, there are 6 bookings tool tabs available for staff members. General users can only access Operation Booking tool and book for themselves.

6.3.1 **Operation Booking**

Operation Booking is used to book events for yourself. The color scheme gives you a quick presentation about the different types of bookings. The system blocks past dates in blue, as you are not permitted to book the past. 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 PDF button. Go to Filter By to view individual user bookings if there are too many bookings on the calendar page.

- Add bookings:
  - Click on orange round + button to add
  - Alternatively, double click or single click on the selected date on the calendar to add bookings.
• Click on ‘OK to save the bookings instantly.

• Each booking tool comes with its own template but the method of creating, editing and saving bookings is the same.

6.3.2 Information Panel

Information panel provides many tools to tailor calendars and to access various resource and booking information.

• Information Panel – about resource details:

• Information Panel – calendar settings:

ACLS provides a way to customize your calendar. There are 2 settings related to the calendar that you are able to control:
o Calendar View: default calendar view upon the first access, week view only or month view
o Calendar Popup: single click or double clicks to open the booking event window

### Calendar Settings

<table>
<thead>
<tr>
<th>Calendar View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week</td>
</tr>
<tr>
<td>Month</td>
</tr>
</tbody>
</table>

Define the calendar view when accessing the calendar, either week or month view.

<table>
<thead>
<tr>
<th>Calendar Popup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Click</td>
</tr>
<tr>
<td>Double Click</td>
</tr>
</tbody>
</table>

Define how calendar booking box is popped up, by single click or double clicks on the calendars.

<table>
<thead>
<tr>
<th>Calendar Background</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dark</td>
</tr>
<tr>
<td>White</td>
</tr>
</tbody>
</table>

Define the calendar background colors, dark or white.

### Single Click vs Double Click:

- 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 double click

### Information Panel – booking quota:

Booking quota defines all the booking permissions and quota.

**Booking Quota**

- Max Allowed Booking Hours/Day: 24
- Max Allowed Booking Hours/Period: 1344
- Allowed Booking Period: 24/08/2020 to 22/11/2020
- Booking Start Time on Day: 0:00
- Booking End Time on Day: 24:59
- Booking on Weekend: Allowed
- Min Hour per Session: 1

In addition to booking quota, you can check your booking balance by clicking on **Refresh** to the balance chart. Moving the mouse over the chart, the balance hours shows up.
• Information Panel – user contacts:

Staff and users can check booking user contacts if they need to contact the users for change of bookings or the other arrangements.

• Information Panel – booking color codes:

Different types of bookings use colors for easy differentiation.

• Information Panel – email notification:

For popular resources, you are able to set up email notification when the bookings are cancelled.

• Information Panel – uploaded booking forms:

This is only available after the resource is enabled the booking form option. Staff can access all the uploaded forms, and users can only access their own submitted forms. The access button is positioned on top of the calendar page.

6.3.3 User/Approve Booking

This booking tool is only available for staff to book for any users excluding staff members, or to approve any pending bookings. When you click **Save**, the system sends the booking confirmation notice to the booked user and the staff member who has made the booking.
6.3.4 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 Resource Booking), and a training booking shows as training in the report.

When you click OK, the system sends the booking confirmation notice to the booked user and the staff member who has made the booking.

6.3.5 Group Booking

This booking tool allows staff to book events or sessions for multiple users at one time. When you click OK, 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.

6.3.6 Commercial Booking

Commercial booking is only available to staff members and is used to book a resource for special commercial operations.

6.3.7 Service Booking

Service booking is only available to staff members, allowing them to book resources 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 resource servicing.

To overwrite current bookings, you need to create a new service booking taking the same time as the current bookings, then click on Ok to save the service booking and the system automatically removes any 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 Ok button.

The service booking tool includes two types of services:

- Scheduled: used for planned or scheduled maintenance, service, etc
- Unscheduled: used for unexpected and sudden resource breakdown service

All the service bookings are open for changes, be in the past or to the future. They are coloured green to indicate that you can make changes or delete the service bookings.
6.3.8 **Account in Booking Details**

This selected account to make the bookings are shown in the booking details.

Regardless of the account number held by the user, account selection page always pops up to ask user to confirm before proceeding to the calendar page. This is option in System global setting to enable or disable the compulsory account selection.
6.3.9 About Offset Setting behaviour in Calendar

The offset time concept rises from the need to book a block of time after normal business hours. For example, business hours are from 9am to 5pm: if you set offset time as 3 hours, it means the time from 5pm to 8pm must be booked in a block. Offset time mechanism applies to a special situation as stated in the case study. Overnight booking is one of the situations you need to set this up for. In most cases, you don't need to use it.

By checking the block time box, you can book from 17:00 to 20:00 in one go. Offset time works well for overnight booking events.

**Case 1:**

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

**Case 2:**

<table>
<thead>
<tr>
<th>Booking start time</th>
</tr>
</thead>
<tbody>
<tr>
<td>8am</td>
</tr>
</tbody>
</table>
Case 3:

### Booking start time
8am

### Booking end time
6pm

### Offset
14 hours

### 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

6.3.10 Repeat Booking

Depend on the permissions, you may see the following options for a repeat booking:

- Daily: this is default option

  ![Repeat Booking interface](image)

  - Time period: 08:00 - 06:15
  - End by: 27/09/2011
  - Reminder: [ ]

- Week: you see this option only if you are permitted to book longer than 2 weeks in advance
Month: you see this option only if you are permitted to book longer than 2 months in advance

The definitions of repeat booking per day, per week or per month is the same as Outlook.
“End By” date is set by the system according to max days/period set out in your certificate or access group. However, you can bring it forward to an earlier date.

6.4 Booking with Form

In certain situations, you might need users to submit the forms while booking the resource. The form might be used for capturing metadata of the sessions, such as referral form, consent form, sample form and safety form. After you set up the booking form in Resource Manager, the form button appears in the calendar pages so users and staff can access the original form to fill in.

To Attach Form:

Booking lightbox window shows the form buttons according to the settings in Resource Manager.
6.5 Booking Confirmation

Users make the future or advance bookings and they can cancel the bookings one day before or anytime depends on the system settings. However, we do know that some users forget to turn up for the booked sessions due to various reasons so the booked resource time is unused and that costing the opportunity for other users who can take over the session time. Thanks to QUT, we introduce a new way to manage the situation. In short, system sends a booking confirmation reminder 3 days (for example) to the user with an embedded confirmation URL, if the user clicks the URL, system confirms the booking as valid, if the user does not click the URL within the date of reminder, the booking is cancelled by the system automatically at 12am on the following day. This feature is optional but does provide more engagement with the users to manage resource sharing efficiently.

- Enable user booking confirmation
Before you can use this feature, you need to turn it on as system disables it by default. Go to **System Settings** -> **Configure System** to enable the parameter.

- Set up user confirmation to all training certificate

A quick and bulk way is provided to enable or disable user confirmation to all the certificates. Go to **System Settings** -> **Configure System**, click on ‘**Enable Certificate Confirmation**’ to enable user confirmation to all the certificates; or click on ‘**Disable Certificate Confirmation**’ to disable user confirmation to all the certificates.

- Set up user confirmation to each training certificate
In addition to the above bulk functions, you can set it up to the individual certificate. The user booking confirmation is tied with each training certificate. By doing so, you can have an individual control to execute this feature to each resource or each certificate of the very resource. So users who have the very training certificate are receiving the booking confirmation reminders. Go to Resource Manager, select a resource to edit.

Explanation of two new parameters:

- **User Booking Confirmation**: to enable or disable the confirmation reminder to the certificate
- **User Booking Confirmation Days**: If the above parameter is checked or enabled, system sends the confirmation reminder to the user who makes the bookings, an embedded
Operating ACLS

URL is included in the reminder notice. By default, it is set to 3 days, which means system sends the reminder 3 days before the booking start date.

- Confirmation Reminder

System sends out the reminder in the following context as example. The user can cancel or confirm the booking.

Click on the embedded URL to confirm the booking by itself.

Click on the embedded URL to cancel the booking by itself.
System scans the user confirmation response once a day at 12am, after scanning, systems turn off the reminder control to the responded bookings, and also cancel the bookings which the user does not respond on the same day. For the cancelled bookings, system sends the cancellation emails to the users. On the following day, the embedded URL page is deemed to expire either due to the cancellation or the completion of user confirmation activation.

6.6 Change Bookings

This is available to staff only. The nominated staff group can change anyone’s future 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 User Booking Edit Permission.

Tick the radio button to select the staff group you want to have the capability to edit other bookings.

6.7 Pre-Approval Bookings

The implementation of pre-approval of a booking is illustrated below:
If the resource 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, opens booking template form:

<Flow BD PACCARDIA III>

| Description | Matthew Grace: Unapproved Event |
| User | Matthew Grace |
| Notes | Sort by Alexa Flour 647 as many as possible |
| Full day | 10:00 | July | 2018 |
| Decision | Approved |

You need to select the “Approved” radio button and click on “Ok”, then save changes to give approval. Users will get notified automatically for the 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 quick way you can approve or decline unapproved bookings at *My Dashboard -> Approve 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.

<table>
<thead>
<tr>
<th>Resource</th>
<th>Canon DSLR camera 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Time</td>
<td>25/07/2021 13:39</td>
</tr>
<tr>
<td>End Time</td>
<td>25/07/2021 17:09</td>
</tr>
<tr>
<td>Booted Time</td>
<td>25/07/2021 02:16</td>
</tr>
<tr>
<td>Notes</td>
<td></td>
</tr>
<tr>
<td>Booted By</td>
<td>Buddhika Abeyratna</td>
</tr>
<tr>
<td>Approve/Decline Notes</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If you need to contact users for any issues, please click on *Click to contact user.*

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

In addition to the quick access through *My 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 browser 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.

6.8 Set Min Booking Unit 15m vs 1h

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

Go to Utilities -> Resource Manager, pick the Min Booking Unit that suits your needs.

• 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.

6.9 About Min Hour Per Session

Min Hour Per Session prevents under-booking issues being faced by labs. The default setting of a session time is 15m or 1 hour depending on the choice set in Resource 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 Utilities -> Resource Manager, pick a resource and edit, then change the field “Min Hour per Session” to the min hours required. 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.
6.10 Set Up Public Access Calendar

ACLS allows you to set up a Public Access Calendar without needing to login. The booking details can be hidden depending on your settings. The advantage of setting up the Public Access Calendar is to provide a quick way of accessing booking information.

Upon clicking on To View Bookings, the calendar shows the bookings for the next 7 days.

To View Bookings on Mobile Browser Version:
6.11 Check Resource Status

Click on **Dashboard -> Resource Status** to view the status of the resource. The status covers the current booking statue and tracking status (if tracker is installed).
6.12 My Bookable Resources

Click on **Booking -> My Bookable Resource** is an alternative way to view the status of the resource which you are certified to book.

First, you need to set up the linked booking resources via Resource Manager.

Open the Linked Booking Resources tile, you see the tiles to add new linked resources, and also the available linked resources.

System designs primary resource and second resource, if you get them linked, when user books primary one and system automatically books the second one, but not vice versa. It is one way to sync the booking between the primary and the second resource.
Go to Booking calendar, you can see the linked details if any. The dark grey colored bookings are the linked bookings. For example, you book Accutom 50-1, system automatically books the same time for Accutom 50-2 as they are linked.

Without the locking, the linked resources are disabled.
6.13.1 Make bookings to the linked bookable resources

All the following booking tools are modified to handle the booking for the linked resources. The dark grey is used to indicate the linked second resource bookings.

- Operation booking tool:

- User booking tool:
- Training booking tool:

- Group booking tool:

- Commercial booking tool:
- **Service booking tool:**

- **Timeline booking tool:**

  - Resource Timeline Calendar
6.14 Set Up Accounts

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 resource 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>
<tr>
<td>Last Update</td>
<td>Staff who made last change and change time</td>
</tr>
</tbody>
</table>

6.15 Default User Registration Account

For the labs which do not require to capture the usage for billing, you are able to set up a default account for each registration approval, which means ACLS automatically adds the default account to the new user profile so he can start to book resources. By doing so, you don’t need to process account information for each new user.
The default account is displayed if it is selected. Click on reset to clear the default account setting.

To set up default account, click on Default Account for User Reg Approval.

6.16 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.
- **Expiry date**: the system assigns the expiry 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 scheduled 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 the 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:**

  ![Received Payment & Operation Cost](image)

  **PAYMENT & COST UPDATE**

  - **Active Budget Envelope:** Choose budget envelop from the list
  - **Received Payment:** Received Payment
  - **Operation Cost:** Operation Cost
  - **Accept**

- **Bookkeeping for received payment:**

  ![Bookkeeping for received payment](image)

  **PAYMENT UPDATE**

  - **Budget Envelope Name:** ALISON FUNSTON – MONASH
  - **Received From:** Choose supervisor from the list
  - **For**
  - **Amount ($)**
  - **Purchase Order Ref**
  - **Invoice Ref**
  - **Received Date:** 10/08/2015
  - **Note**
  - **Accept**
  - **Reset**
  - **Payment & Cost History**

You can view the history of Received Payment & Operation Cost entry at any time.

![Received Payment & Operation Cost History](image)

<table>
<thead>
<tr>
<th>From</th>
<th>For</th>
<th>Received Amount ($)</th>
<th>Operation Cost ($)</th>
<th>Purchase Order Ref</th>
<th>Invoice Ref</th>
<th>Note</th>
<th>Received Date</th>
<th>Received By</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alison Funkt</td>
<td>Initial payment for $2,000</td>
<td>2,000.00</td>
<td></td>
<td>23/02/2012</td>
<td>Swanne York</td>
<td>Locked on 07/03/2012</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Bookkeeping for operation cost, such as material cost, labour cost, etc. However, this does not refer to resource 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 a 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, that is, you can’t 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.

### 6.17 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 full (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.

For example, type in ‘mole’ to search any projects related to molecules. To edit the project, click on Edit button to continue.

**Project Form:**

You can upload any related project forms: ethic form, animal form, project funding form, project OHS form, etc.

Click on Add/Delete Form to start.
### Project Manager

- **Project Short Title**: A comprehensive analysis and review of Anurans from the rich Tertiary deposits of Riversleigh, Queensland.
- **Project Full Title**: A comprehensive analysis & review of Anurans from Tertiary deposits of Riversleigh, QLD Australia.
- **Ethnic Number**: NA
- **Superior**: 1401 Sue Hind - School of Biological, Earth and Environmental Sciences
- **Other Researchers**: Roy Ferrier.
- **Available Accounts**: UNSW SEES RE115 RG168644-100%
- **Project Description**:

  ![Project Description](#)

  *5000 (max char 5000)*

  **Active From Date**: 

  **Project Due Date**: 31/12/2021

  **Archive Project Now**: ❌

---

### Project Manager

- **Add project form**.

  ![Add project form](#)

  **Upon upload, you MUST click on button (Save Form to Project) to add form:**

  ![Documents Upload](#)

  *Note: Form Name MUST NOT contain any single quote character!*
6.18 Search Users

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

- User Profile Manager
- Find User Training Records
- Find User By Supervisor
- Newly Reg User Summary

The 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>Find User Training Records</td>
<td>- Explore user training records</td>
</tr>
<tr>
<td></td>
<td>- Staff group and above can access this function</td>
</tr>
<tr>
<td>Find 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>Newly Reg User Summary</td>
<td>- Staff group and above can access this function</td>
</tr>
</tbody>
</table>

6.18.1 User Profile Manager

ACLS provides a quick search and a full search capability. The default is quick search. However, as staff, you are able to run a full search with many options by school or organization, account or project, group, training certificates and phone number.

There are two options to display the search results: Short Form and Full Form.

6.18.2 Find User Training Records

Staff and admin can search and find any user training records.
6.18.3 Newly Reg User Summary

This function displays the number of new users registered in a specific period by selecting the period.

![Newly Reg User Summary]

6.19 Export User Data

Through User Profile Analyser -> Grid Charts, you are able to export user data to an Excel file using the onscreen excel tool.

First, you need to define user data fields. Simply select the data field of your choice, and submit.

![User Profile Analyser]

6.20 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 Email List**
- Click on **Send Message** 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.

- My Mailing List
You can set up your own favorite mailing list. Choose My Mailing List in Type of Group, you can show the list details and you can broadcast or get the email list for My Mailing List.

- Generate Email List

Generate Email List is provided if you wish to retrieve the mail list for the local email client, such as Outlook, etc. In particular, when you need to broadcast messages with an attachment, you’d like to get the list as the current ACLS does not support emails with attachments yet.

6.21 Contact User

Staff are able to contact each user at the user profile page. This is a handy tool to communicate with the user.

6.22 Edit Booking Data and Usage Log Data

6.22.1 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.
6.22.2 **Usage Log Data (collected by tracker)**

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.

However, as you may be aware, tracker may not record the logout time due to the following operations:

- Without clicking on logout button on tracker, the user logs off the computer
- Without clicking on logout button on tracker, the user may reboot computer
- Due to network breakdown, the system fails to record the logout time.
- Due to server breakdown, the system fails to record the logout time.

As we know, the world is not perfect, so admin/staff have to correct error usage logs if you want to produce correct usage reports and invoices. The correction should be carried out in the first week of each month to fix the error logs of the last month.

A smart feature is implemented to highlight the error logs for correction. Follow the steps below to fix error logs.

- **Fix Error Logs**

If there are errors, you can see a short list of error logs. If not, the table will appear blank.

- No error logs:

- Have error logs:
Simply click on Click to Fix. Click to fix defaults to add a logout time for 0.1h usage time. 0.1h usage time is just a default value for the missing logout time. To estimate the correct usage time, you may take the following recommended steps:

- **Contact user who was involved in the missing logout time**
- **Check against the local tracker log file on the instrument computer**
- **Check against the booking hours made by the user**

You may also apply a best estimate of usage time based on lab policy and your experience.

It is good practice to print out the error logs in case you wish to compare the results after fixing them.

The system highlights any usage hours at 0.1h for your attention to adjust to the correct usage time. You may see a few 0 hour logs which do not mean errors. Users may login and logout quickly on instrument computers for simple tasks of less than 0.1h (or 6 minutes).

**Important Notes**

Fixing error tool is not guaranteed to fix all kinds of errors. If the tool does not fix the error, you have the option to delete the error logs and add a new one. However, only the system administrator is given the power to delete logs as this is a non-recoverable action.

### 6.23 Generate Reports

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

The level of access control is detailed in the table below:

<table>
<thead>
<tr>
<th>Level of Access</th>
<th>User Data Report</th>
<th>Sample Job Report</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>User group can access their own booking data or usage data</td>
<td>Lab Manager group can access all sample job reports</td>
</tr>
<tr>
<td></td>
<td>Supervisor group can access their own and their supervised group’s booking data and usage data</td>
<td>Admin group can access all sample job reports, and generate invoice statements</td>
</tr>
<tr>
<td></td>
<td>Staff group can access all booking data and usage data, plus sum data by resource</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lab Manager group can access all booking data and usage data, plus sum data by resource, and sum data by univ, school and org</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Admin group can access all booking data and usage data, plus sum data by resource, and sum data by univ, school and org, and generate invoice statements per supervisor</td>
<td></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 an individual user; resource; school/org are available in Report Manager. Additional reporting tools available:

- Tracker usage report
- Sample report
- Training certificate report
- Commercial booking report
- Group booking report
- Archived Excel files

### 6.23.1 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 reports by year index.

Furthermore, the system provides you with sorting options to assist with your reporting needs. The following hour calculations are made to provide the detailed booking report against the selected period of time.

- Add session booked hours
- Calculate booked hours with the selected month or selected period
### 6.23.2 User Report Snapshot

**Booking Report - User**
- **Report For:** June 2019
- **Resource:** EN61602
- **Booked Date:** 2016-06-23
- **Booked Time:** 09:00
- **Duration:** 01:30
- **Account:** LAFD/OPA/BIMM/LEGION
- **Price:** $10.00
- **Status:** Locked

### 6.23.3 Resource Report Snapshot

**Booking Report - Resource**
- **Report For:** June 2019
- **Resource:** EN61602
- **User:** Mike
- **Organization:** Mechanical Engineering
- **Account:** LAFD/OPA/BIMM/LEGION
- **Amount:** $10.00
- **Status:** Locked

<table>
<thead>
<tr>
<th>User Name</th>
<th>School/Organization</th>
<th>Supervisor</th>
<th>Account</th>
<th>Amount</th>
<th>Charge/Hour</th>
<th>Booked Hours</th>
<th>Voucher Code</th>
<th>Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mike</td>
<td>Mechanical Engineering</td>
<td>John</td>
<td>LAFD/OPA/BIMM/LEGION</td>
<td>$10.00</td>
<td>2.00</td>
<td>5.00</td>
<td></td>
<td>$50.00</td>
</tr>
<tr>
<td>Jane</td>
<td>Mechanical Engineering</td>
<td>Sarah</td>
<td>LAFD/OPA/BIMM/LEGION</td>
<td>$10.00</td>
<td>2.00</td>
<td>5.00</td>
<td></td>
<td>$50.00</td>
</tr>
<tr>
<td>Jack</td>
<td>Chemical Engineering</td>
<td>David</td>
<td>LAFD/OPA/BIMM/LEGION</td>
<td>$10.00</td>
<td>2.00</td>
<td>5.00</td>
<td></td>
<td>$50.00</td>
</tr>
<tr>
<td>Jill</td>
<td>Mechanical Engineering</td>
<td>Emily</td>
<td>LAFD/OPA/BIMM/LEGION</td>
<td>$10.00</td>
<td>2.00</td>
<td>5.00</td>
<td></td>
<td>$50.00</td>
</tr>
</tbody>
</table>
6.23.4 *School Report Snapshot*

![Screenshot of School Report Snapshot]

6.23.5 *Featured reports*

The previous cost related reports are classified as featured report. The newly complete reports are fully multi-threads finish and improve the response and won’t cause system overloading. The new reports focus on the bookings only with the cost calculations. For cost related reports, please enable the featured reports and out of the best, use batch reports.

6.23.6 *Training Certificate Report*

A handy report feature is added to ACLS, managers and admin can access the full summary of the training certificate details.

Go to *Report Manager -> Training Certificate report*, you could filter and export report to suit your needs, such as OHS report and compliances.

6.23.7 *Tracker Reports*

Tracker reports aim to provide a tool to report the actual operation time of each user usage session in addition to the booking reports. There are two types of tracker reports, sorting by resources or by users.
In tracker report by user, it shows the booking hours vs tracker usage hours as an good indication how users book resources and how they physically accessing the resources.

<table>
<thead>
<tr>
<th>User</th>
<th>Resource</th>
<th>Room</th>
<th>Account/Project</th>
<th>Start Time</th>
<th>End Time</th>
<th>Usage Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Doe</td>
<td>SEU 3456</td>
<td>304</td>
<td>SEU 3456</td>
<td>11/02/2021</td>
<td>05/02/21</td>
<td>1.5</td>
</tr>
<tr>
<td>Jane Smith</td>
<td>SEU 3405</td>
<td>305</td>
<td>SEU 3405</td>
<td>11/03/2021</td>
<td>05/03/21</td>
<td>1.2</td>
</tr>
<tr>
<td>John Doe</td>
<td>SEU 3456</td>
<td>304</td>
<td>SEU 3456</td>
<td>11/04/2021</td>
<td>05/04/21</td>
<td>1.1</td>
</tr>
</tbody>
</table>

6.24 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, as well as 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

6.24.1 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.
6.24.2  Supervisor Invoice Snapshot: Sample Jobs

Click on Sample Job 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(es) and click on Continue.

Here is an example of the invoice statement:
6.24.3  **Batch Data Invoice Statement (bDIS)**

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

You have the option to run *bDIS* 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 Month 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.

6.25 Invoicing Summary

This feature is to make invoicing job easier for lab managers and admin staff. Admin can easily combine all invoices over a month or over a year. The invoice covers usage charges and consumable charges, and also the original invoices.
6.26 Set Up Trainers and Certificates

There are two ways to set up trainers and certificates: go to Utilities -> Training Manager, or go to User Profile Manager.

There are two kinds of certificates:
- Certificates per resource
- Certificates per resource group

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

Select the Resource/Resource Group from the drop down list. List All gives an overview of all trainers and certificates.
Group certificates supersede the single resource certificates. The same rules apply to trainers.

When you need to enable the disabled certificates, you can go to Training Manager -> List All Certificate to enable.

6.26.1 Trainer Registration

A trainer can be removed, or be temporarily suspended. Through Training Manager, multiple staff can be set as one resource trainer at one go.

Go to User Profile Manager, edit the staff profile, go to Trainer tab, simply check or uncheck resource to add/remove trainer status to the staff. Through profile, multiple resource trainer status can be updated to the staff.
6.26.2 Set Up Primary Trainer

Primary trainer is the first in the trainer contact list at resource details of the calendar or resource catalogues.

6.26.3 Find Resource Trainers

Click on Booking -> Resource Trainers to access.
6.26.4 **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 resource name as part of each certificate title for easy recognition.</td>
</tr>
<tr>
<td>Content/Details</td>
<td>Details of certificate</td>
</tr>
<tr>
<td>Max Hours/Day</td>
<td>Max permitted booking hours per day</td>
</tr>
<tr>
<td>Max Days/Period</td>
<td>Max permitted days from now</td>
</tr>
<tr>
<td>Max Hours/Period</td>
<td>Max permitted hours within Max Days/Period</td>
</tr>
<tr>
<td>Booking Start Time</td>
<td>Allowed start time on the day</td>
</tr>
<tr>
<td>Booking End Time</td>
<td>Allowed end time on the day</td>
</tr>
<tr>
<td>Booking End Time Offset</td>
<td>Refer to offset section</td>
</tr>
<tr>
<td>Booking Cancellation</td>
<td>If unchecked, booking can be cancelled anytime. If checked, bookings can be cancelled 24 hours before the start of the session</td>
</tr>
<tr>
<td>Weekend Booking</td>
<td>If checked, weekend can be booked; if unchecked, weekend cannot be booked</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>
</tbody>
</table>
Operating ACLS

<table>
<thead>
<tr>
<th>Certificate Invalid</th>
<th>The date of certificate deactivation.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Update</td>
<td>Staff who made last change and change time</td>
</tr>
</tbody>
</table>

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

6.26.5 Edit User Certificates

Go to User Profile -> Edit User Certificate page, a live search box is provided to quickly find the right the certificate to add to the user training profile. Simply type in any part of certificate name to add.

6.26.6 Certificate Report

Admin staff may be interested in getting the number of users who are issued training certificates over a period of time. Training Certificate Report provides the statistical data for that.
### 6.26.7 User Certification Notes

A note field is available to the user certification process. The trainers can have the options to record the notes for each training records.

The certification notes are served as the part of training records in relation to any signed forms.

### 6.27 Appoint Any Users to Be Resource Trainer

Many labs request to provide the feature that any users (students or researchers) can be appointed as the resource trainer to provide lab training, induction, teaching work. Please follow the steps to set up users as resource trainers.

#### 6.27.1 Set up user as trainer

Step 1: set up user trainer group in Access Group manager. Users can only be set as resource trainers if he is under user trainer group.
Step 2: set up user to the user trainer group in user profile manager

Step 3: set up the user as trainers in Training Manager. In the above example, Abbas is set up to the user trainer group, now in Training Manager, he is in the selection list to appoint as the trainer.
Step 4: As the illustrated example, Abbas is now the trainer for XT Slide.

6.27.2 User trainer login

When user login, for example, Abbas login, this is the menu upon his login. User Certificate is available for Abbas to set up training certificates to the other users.
Click on certificate button to continue.

<table>
<thead>
<tr>
<th>User</th>
<th>Certificate</th>
<th>Code</th>
<th>Issued Time</th>
<th>Notes</th>
<th>Trainer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aaron Gilmour</td>
<td>APERIO FL SLIDE SCANNER</td>
<td>05</td>
<td>28/05/2020</td>
<td></td>
<td>Abbas Darastani Farahani</td>
</tr>
</tbody>
</table>

Choose certificate from the list: If you wish to add new certificate

Accept Changes
6.28 Record User Forms

There are two ways to do so.

Through **User Profile Manager**, add form to the user.

Through **Form Repository Manager**, you are able to register the forms. This can centralize the storage of signed procedures, forms and papers 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.

### 6.29 Resource Documents

Users are able to access resource documents on Catalogue page and Calendar pages. It would be highly recommended to add resource related documents, such as OHS, training notes, safety notes and operation tips, and more.

Please refer to the next chapter on how to upload the resource documents to ACLS.
6.30 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 resource documents. You can perform the following tasks:

- Add/Edit General Document Sub-Folders
- Register General Documents
- Register Resource Documents
- Search Documents
- Deleted Document Records
Click on **General Documents** to register:

- Add/Edit General Document Sub-Folders
- Register General Documents

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:

Upon upload, you MUST click on button [Save To Doc Registry] to complete document registration.

When Upload is completed, you can see the all uploaded file names as below:

Upon upload, you MUST click on button [Save To Doc Registry] to complete document registration.

Step 2: Save to registry

You must click on Save To Doc Registry to register the documents to the system. If you don’t do this, then the documents are not considered as Registered.
The system returns to the home page of *Document Repository Manager* and shows you the documents you just uploaded.

If you go to *Booking tab -> Documents tile*, you can see the results as illustrated:

Register Resource Document is similar to the process shown above. The only difference is that you must pick a resource first.

The difference between general documents and resource 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>Resource Documents</strong></td>
<td>Users who have a resource 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 resource 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.

6.31 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

Utilizing 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 sample test and analyses. 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.

- Create the method of analysis.

- Each method of analysis is linked to a resource 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.

6.32 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-2018-19), 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 Sample Methods 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.
6.33 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.

6.34 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.

6.35 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.
6.36 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 Dashboard.

Go to Booking Tab -> Lab Event & Holiday Calendar to set up event calendar. You can set up events and holidays for the current year, last year and next year.
Users can also access the Lab Event Calendar on My Home. If the calendar is set up with more contents, click on ‘details …’ to see the popup screen like a feature page.

Click on More Details to see the fly-in modal information window.
Furthermore, you are able to enable or disable any resource booking calendars for a defined period of time. For example, if you need to shut down any resource due to special events or holidays, you can set this up through Lab Event Calendar.

The system displays the status of action, select all resources [Select All] to close calendar for booking, or just select the resources to close calendars for the selected.

In the following example, all resources are selected to close all calendars not accepting bookings.
To re-open the resource calendar, you just need to delete the lab event as shown here.
Set up public holiday:

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

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

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

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

Users are able to submit training & support requests, track down the status of those requests, and the responses made by staff. This is a support ticketing module in ACLS.

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 functions.

**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, 2 requests are still open of 3 requests submitted in total.

Similar to the webmail 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:

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 user 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 staff. Over a period of time, everyone can benefit from the accumulation of solutions and knowledge.

6.38 Conduct Survey

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

6.38.1 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 resource 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 the 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 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>
</tbody>
</table>

- 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.

- Upload survey questions:
Survey questions can only be added to the system through uploading a text file. 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 should 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 to ‘question 1’ in the survey, q2 to ‘question 2’ etc. The system detects ‘q1’ as a keyword for the multiple choice answers of question 1, it scans and saves the multiple choice answers for question 1 in the survey form.

Survey creator is capable of providing radio/option button selection, allowing for one selection from multiple answer choices. As well as checkbox options, where users can choose multiple answers.
Welcome to ACLS

**Survey Questions:**

1. I'm satisfied with staff support:
   - [ ] Strongly agree
   - [ ] Agree
   - [ ] Indifferent
   - [ ] Disagree
   - [ ] Strongly Disagree

2. I've used the ANMMRF facilities for the first time within the last 12 months?
   - [ ] Yes
   - [ ] No
   - [ ] Other, please specify here

3. I'm satisfied with laboratory facilities:
   - [ ] Strongly agree
   - [ ] Agree
   - [ ] Indifferent
   - [ ] Disagree
   - [ ] Strongly Disagree

4. I learned about ANMMRF and its microscopy services from?
   - [ ] The Internet
   - [ ] My academic supervisor
   - [ ] A colleague or friend
   - [ ] Seminar
   - [ ] ANMMRF showcase, presentation or publication
   - [ ] Staff at ANMMRF
   - [ ] Other

**Survey Comments:**

- **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!

6.38.2 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.

6.38.3 Analyse Survey

There are 3 options to conduct survey analysis:

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

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

Bar chart:
Total Responses: 8

Survey Analysis:

Questions:
1. Text files provide a simple, convenient way of storing textual data. They do provide mechanisms for reading and writing numerical data stored as text (see Annex), but it is safer and easier to store structured records when storing anything other than plain text strings.

<table>
<thead>
<tr>
<th></th>
<th>A1: Strongly Agree</th>
<th>A2: Agree</th>
<th>A3: Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1</td>
<td>15.7%</td>
<td>30.4%</td>
<td>53.9%</td>
</tr>
<tr>
<td>A2</td>
<td>10.0%</td>
<td>50.0%</td>
<td>39.9%</td>
</tr>
<tr>
<td>A3</td>
<td>23.3%</td>
<td>23.3%</td>
<td>53.3%</td>
</tr>
</tbody>
</table>

Pie chart:
Total Responses: 8

Survey Analysis:

Questions:
1. Text files provide a simple, convenient way of storing textual data. They do provide mechanisms for reading and writing numerical data stored as text (see Annex), but it is safer and easier to store structured records when storing anything other than plain text strings.

<table>
<thead>
<tr>
<th></th>
<th>A1: Strongly Agree</th>
<th>A2: Agree</th>
<th>A3: Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1</td>
<td>40.0%</td>
<td>60.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>A2</td>
<td>10.0%</td>
<td>30.0%</td>
<td>59.9%</td>
</tr>
<tr>
<td>A3</td>
<td>20.0%</td>
<td>40.0%</td>
<td>40.0%</td>
</tr>
</tbody>
</table>

AC LAB SYSTEM 160
It is useful to know what the response rate is to the survey. The system compares the response of the active registered users.

**Donut chart:**

<table>
<thead>
<tr>
<th>Total Responses: 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey Analysis:</td>
</tr>
<tr>
<td>A0: Strongly Agree</td>
</tr>
<tr>
<td>A1: Agree</td>
</tr>
<tr>
<td>A2: Disagree</td>
</tr>
</tbody>
</table>

**Table chart:**

<table>
<thead>
<tr>
<th>Total Responses: 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey Analysis:</td>
</tr>
<tr>
<td>A0: Strongly Agree</td>
</tr>
<tr>
<td>A1: Agree</td>
</tr>
<tr>
<td>A2: Disagree</td>
</tr>
</tbody>
</table>

**Questions**
1. Text files provide a simple, convenient way of storing textual data. They do provide mechanisms for reading and writing numerical data stored as text (see Write), but it is safer and easier to use structured records when storing anything other than plain text strings.

2. Text files provide a simple, convenient way of storing textual data. They do provide mechanisms for reading and writing numerical data stored as text (see Write), but it is safer and easier to use structured records when storing anything other than plain text strings.

**Survey Rate:**

- **Rate:** Survey Response vs Active Users
- **Rate:** Survey Response vs Active Staff & Users
- **Total Active Users:** 316
- **Total Active Staff & Users:** 334

**Note:** Participation rate was saved, you can reset it if you wish to update!
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. 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 of this year's users, and then may conduct the same survey the next year for that year's users.

Comparing the results, you can easily identify if there are any variations for decision making and other purposes.
6.39 Analyse Publications

ACLS provides the following ways to run the analysis:

- **Search publications:**
  
  You can type in any search texts to start search and export to EXCEL.

- **Bar charts:**
  
  Through bar charts, you can easily zoom into publication statistics by journal or by school/organization.
Pie charts:

Through pie charts, you can easily zoom into publication statistics in % by journal or by school/organization.

6.40 Mobile Browser Version

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

Upon login, the certified resource list is ready for selection.
My Bookings: showing your own bookings from now into the future.

User Profile: click on the name link to see your own profile.
**Desktop Version:** click on the link to switch you to the desktop version (full ACLS version).

**About ACLS:** shows ACLS version.

---

**Make Bookings:** click on the resource you want to make and view bookings.
6.41 Registration Pathway

The default online registration process is a single step process. Users fill in the form and submit. The staff-in-charge either approves or rejects the registration.

However, certain labs wish to run a multiple registration process due to their lab OHS requirements. Hence, the registration pathway is designed to monitor and manage the
registration process. Through Pathway, users and staff can zoom in to the process to improve the registration process transparency.

- Flow Chart of User Registration Process:

- Enable pathway:

  By default, ACLS disables the pathway. If you wish to run the pathway to manage the registration process, you have to enable it first through “System Settings” -> “Configure System”.

- Set up pathway:
Registration Pathway is a process of approving a user registration request. By default, the system has the first built-in step *Received registration*. Admin staff can amend and add the registration process steps to suit their labs.

Go to **System Settings -> Registration Pathway**.

You are able to define a step number for each pathway step. ACLS shows the step order in the pathway.

- **To add a new step:**

You can have up to 20 steps in the registration pathway.

- **Pathway on Registration Page**
After you set up the pathway, the pathway link is shown on the registration page so that users can check their multiple-steps registration status.

The registration ref number can be used to check the registration pathway status.

A copy of the registration notice is sent to the contact us email defined in Configure System. If you wish to add more staff to receive the new user registration request email, you can go to System Settings -> Email Receiver to set them up.

- Approve Registration

Due to the introduction of Registration Pathway, to approve the user registration, you need to go to User Profile -> Registration Pathway Manager, and select the user to continue.

On the next page, you are able to see the status of each Registration Pathway. You are able to approve user registrations until the status is closed.
Should you need to contact the user, simply go to Contact User.

Should you need to access user registration form details, go to “Click to access registration form”. For admin, you are able to update the form details; for staff, you can view form only.

6.42 Mobile App

Mobile app aims to work as a single gateway to access all ACLS nodes, and bridges the research community. The new generation of ACLS mobile app is under development.

6.43 Google Analytics

Google Analytics is a freemium web analytics service offered by Google that tracks and reports website traffic. Google launched the service in November 2005 after acquiring Urchin. Google Analytics is now the most widely used web analytics service on the Internet.
ACLS can insert Google Analytics script through System Settings -> Configure System -> Google Analytics. You can join our centralised Google Analytics account or your own lab account.

First, create a text file and copy Google Analytics script to the text file and save it. Then upload the text file to ACLS and click on Submit.

Here is an example of Google Analytics for UNSW ACLS SSI.

6.44 Resource Catalogue

Labs can catalogue the research equipment and other items. By default, ACLS catalogues all active resources. Users and staff are able to access resource information and to book.
On catalogue grid table pages, you are able to access resource description, QR codes and location and trainers.

Resource catalogue provides a table form to access all active resource information. Upon login, the resource catalogue cover page with the indication of total active resources is displayed.

### 6.45 Manage and Track Consumables

Labs may provide the consumables to users for preparing and running experiments. ACLS provides the feature to manage consumable stock, track down the orders in the same concept as online shopping cart.

**Register consumables:**

Registering new consumables are the first part of data entry. Go to **Staff -> Consumable Resources** to proceed.
Consumable parameters are explained below.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumable Code</td>
<td>Short code or barcode for the consumable, for example, AT2070</td>
</tr>
<tr>
<td>Description</td>
<td>A short description for consumables, for example, ATnLOF2070 100ml</td>
</tr>
<tr>
<td>Consumable Category</td>
<td>Consumable category to manage the large scale of consumables</td>
</tr>
<tr>
<td>Consumable Image</td>
<td>An image to describe the consumable.</td>
</tr>
<tr>
<td>Consumable QR Code</td>
<td>Use mobile to scan QR code to order consumable at lab</td>
</tr>
<tr>
<td>Unit</td>
<td>Unit type, for example, ml, kg, cm. It can be used as 100ml as unit.</td>
</tr>
<tr>
<td>Min Order Quantity</td>
<td>Min order quantity other than 1</td>
</tr>
<tr>
<td>Price per Unit</td>
<td>Price per unit</td>
</tr>
<tr>
<td>Stock Quantity</td>
<td>Good practice to set up and monitor the stocks. So lab can place the orders when the stock goes low</td>
</tr>
<tr>
<td>Re-Order Quantity</td>
<td>Re-order quantity is the min stock level you wish to maintain.</td>
</tr>
<tr>
<td>Hide Stock Qty on Cart</td>
<td>Tick to display the stock quantity on the order cart page</td>
</tr>
<tr>
<td>Quick Close on Order</td>
<td>Order is closed upon placing the order</td>
</tr>
</tbody>
</table>
Operating ACLS

Admin Only
If it is enabled, the consumable can be ordered by lab admin only.
It means that the consumable is Not available for users

Search/Edit consumables:

3 searching ranges are provided. Sorting in category is available as well.

Search/Edit Consumables

Key Words: (consumable code, description)

Search By:  Active (2)  Inactive (0)  All (2)

You are able to edit the consumable profile through the search results. The consumables with low stocks will be flagged for attention.

Search/Edit Consumables

Key Words: (consumable code, description)

Search By:  Active (2)  Inactive (0)  All (2)

Click on Edit, you are able to update consumable profile and upload the images.
You can top up the stock quantity if it goes below the re-order quantity. System also tracks the changes of the price per unit.

Recommended image size is 200px by 200px.
Price change logs are shown via flying-in modal window.

Stock quantity change is logged for accountability and stock quantity audit.

Users to order consumables:
There are two ways to place order for consumables.

- Through frequent access links on Booking tab

- Through Dashboard
The way to order consumables is the same as that of the online shopping shop. System provides the live search and the catalogues to put the ordered items to the cart.

**Order Consumables**

- Add consumables to cart.
- Step 1: Add Items to cart
- Step 2: Update quantity
- Step 3: Select Account
- Step 4: Submit order

Users are able to check his order records via My Order, and check the cart status via My Cart.

My Cart shows the selected consumables, and users can update the order quantity or remove the items.
3 steps are required to confirm the order after adding items to cart.

Step 3 is to select the account and submit order. Upon placing the order, system sends the notification to the user on the order details.

Users are able to continue shopping or logout to consumable login page.

**Lab admin to order consumables for users:**

Lab admin can order consumables for any users if needed. Go to Consumable Manager -> Order Consumables for User.
The way to order consumables is the same as that for users described in the above section except of Step 3. In addition, lab admin is able to see any users’ orders and user cart instead of my cart.

Lab admin can check any users’ order via User Orders. 3 steps are required to confirm the order after adding items to cart.

Step 3 is to select the user and his accounts, and submit order.
For each order, after the order is placed, an email will be sent to the user with the following information.

- Please ask one of the staffs in the cleanroom for delivery.
- Or ask any staff in the office for delivery.

**Update consumable orders:**

Lab admins are able to change the any order details. Go to **Staff -> Consumable Resources -> Change Consumable Orders.**

Click on Update to edit the order.

**Delivery status of consumable orders:**

Labs require to record the delivery status of each consumable orders. Go to **Staff -> Consumable Resources -> Change Consumable Order,** system shows the delivery status as **Open** or **Closed.**

For the closed orders, you can see the staff who records delivery and recording date.
For the open orders, you can record the delivery by ticking the checkbox of delivery status.

**Cancel order:**

Changes are made to keep the order quantity after the order is cancelled. System auto-rolls back the ordered quantity to the stocks if the order is cancelled.

You are able to restore the cancelled order anytime if you wish to.
Consumable order report:

Lab admin can access all the consumable orders with the sorting features. Go to **Staff -> Consumable Resources -> Consumable Order Report.**

Consumable details including the stock quantity and low stock flag are provided.
Graphic presentation is available for the reports.

**Sort by User:**

![Graphic presentation of User report]

**Sort by Consumable:**

![Graphic presentation of Consumable report]

**Sort by Account:**

![Graphic presentation of Account report]
Consumable stock check:

System sends out a daily email to the lab admin on the consumable stock quantity.

Hi Admin,

System runs daily stock check. The current consumable stock quantities are detailed here.

-----------------------------------------------------------------------------------
- Consumable: C974009 4 inch chrome mask (soda lime) with holder, @stock quantity: 100
- Consumable: DIS4306 Crystallising dish for 6, @stock quantity: 200

Kind regards,

ACLS Demo

THIS IS SYSTEM GENERATED RESPONSE. PLEASE DO NOT REPLY.

Integrate the consumable orders to the monthly invoice:

Consumable orders are consolidated to the monthly invoice for the delivered orders. Here are the samples of the invoice for reference.

6.46 Staff Comments on Users

Staff may want to comments on some users regarding his performance, behaviours, and others. With the sticky notes on pin board, you can go to user Profile -> Pinboard to add your sticky notes

Only lab admin can delete the messages for the staff comments. The sticky notes commenting users can only accessible by all the staff on individual user profile, they are not shown on public pin board.
6.47 My Pin board

My pin board is like a message wall or cupboard in a lab room so users can leave sticky notes for anything. There are two types of sticky note.

- Personal: only accessible by user himself/herself.
- Public: can be viewed by any registered user and staff. The public sticky notes will be deleted from the pin board in 7 days or can be deleted by lab admin staff.

Upon login, you can see a pin board indicator on the top bar to tell you if any sticky notes are left on pin board.

Click on the green pin board icon, a fly-in modal window shows up the sticky notes on the pin board, including your own sticky notes and other people’s sticky notes which allows public view.
Go to *My Pinboard* to manage your sticky notes. For those unwanted, simply click on Rubbish Bin to delete.

Lab admin can delete any public sticky notes on his/her pin board.

### 6.48 Most Popular Resources

With Corea Analytics, users and staff are able to look at the most bookable resources and its trend over a year span.
6.49 Most Training Resources

Core Analytics is the latest collection of ACLS. Staff are able to access the most training resources and its trend over a year span.
6.50 Most Outage Resources

Core Analytics is the latest collection of ACLS. Staff are able to access the most outage resources and its trend over a year span.

6.51 Video Player

This feature helps to promote training courses, organization events, and so on. When a user clicks on the more video clips, he/she will be taken to the video clip page.

Provided that you already set one video clip up, system shows it on the landing page upon sign in.

Admin staff can access Video Repository Manager to register or change video clips. Admin is able to add or edit the video clips provided the video clips can be accessed on Youtube or other video platforms.
Explanation of the form:

- **Title**: video clip title which can be copied from Youtube, for example
- **Description**: video description which can be copied from Youtube, for example
- **Video type**: select the appropriate from the list, system provides the sorting feature in the future
- **Video source**: either Youtube or the other platform. The difference is that system gets the default thumbnail image of the video clip from Youtube automatically, or you can upload the thumbnail image if you get video from other video sources.
- **Embed URL**: The direct video URL won’t work here, You must get the embed URL from Youtube or other video sources. For example, on Youtube, right click on the video to see the dropdown list, then go to ‘Copy embed code’.
Operating ACLS

- Resource: you can register the clip under a resource name, system can sort the clips in the future to the resources
- Set as default: system always keep one clip as default. The default will be shown on the landing page upon login.
- Status: ticked the checkbox to enable video clip. If the clip is disabled, then it won’t be displayed in the video page.

6.52 User Profile Analyser

ACLS starts to equip with the graphic analytical tools to provide user growth charts over years, user population and geographic charts over multiple schools and orgs, and training trend charts.

- Growth charts

Growth charts demonstrate the trend of the user growth over years, and over months in the selected year. Using the charts, lab can foresee the future growth potential and provide a better strategy to meet the research demands.
- **Population charts**

  Population and geographic charts indicate the user population distributions. Using the charts, lab can work out a better strategy to meet the research demands of the major research groups.

- **Training charts**

  Training charts show the training records over years, and over months in the selected year. Using the charts, lab can foresee the future training demands and work out a better way to meet the training demands.
6.53 Customise Induction Process

A customizable induction process is introduced to give lab power to decide if the users are required to go through a special induction process. The process is required for medical labs, PC2 labs, Ethic labs and so on. Users who need to go through the process must complete the online process form on booking dashboard, and staff in charge might need to verify the submitted induction process. Furthermore, if the collaboration protocol is established between labs, the user induction process results can be shared between labs, so the same user does not need to re-do the induction process at the collaborated labs, just to provide the induction process reference ID.
6.53.1 Set Up Induction Process

You are able to set up multiple induction processes subject to the lab operational requirements.

Go to Staff -> Utility -> Induction Process Manager.
Each induction process covers the header and body first.

After creating an induction process, more details are required to make it work.

- Set up each step of the process
Basically, you need to tick the preset box and define the step order.

- Add staff-in-charge to the process

Upon users complete the induction process, ACLS sends the email notifications to the users and the nominated staff-in-charge.
- Preview induction process

Preview is available, it is a good practice to play preview after you complete the induction process setup.

6.53.2 Enable Induction Process to Users

There are two ways to enforce users to do the induction process.

- New user

Go to online registration process in User Profile Manager, select the induction process to enable.
Registered user

Go to User Profile Manager to edit user profile, go to induction process tab to enable or disable the induction.

Select the induction process and turn on to enable the process to the user.

Simply click on turn-off button to disable the induction process to the user.
Each induction process record is shown up in user profile, staff can verify the result if needed.

### 6.53.3 How The User Does an Induction Process?

Upon login to ACLS, users and staff see the induction tile on the booking tab page.

Click on Start Now to enter the induction process, ACLS automatically generates the reference ID, the ID includes lab short name.
BMIF Induction

The Mark Wellworth Analytical Centre (MWAC) is part of the Division of Research. We manage major instrumentation & custom-built laboratories, mainly in the Lowy, Wallace Wurth and Chemical Sciences buildings.

Reference ID: BMIF-Ref-WelHYD6G9htd-zZuXGia-1-1

Step 1: Induction around BMIF labs

Step 2: Upload completed induction form

Select Staff to Submit

- Dong Zhang
- Florence Tomasselli

The induction process only completes till staff finalise the process verification.
BMIF Induction
The Mark Wainwright Analytical Centre (MWAC) is part of the Division of Research. We manage major instrumentation used by researchers for the situ custom-built laboratories, mainly in the Lory, Wallace Wurth and Chemical Sciences buildings.

Reference ID: BMIF-Ral-YWhYD8QHnd-n2uXda-1-1

**Step 1: Induction around BMIF labs**

Reference: BMIF-Ral-YWhYD8QHnd-n2uXda-1-1
Last submission: 23/02/2019 10:00
Verification status: open

**Step 2: Upload completed induction form**

On staff ends, system shows full details of each induction process in the user profile.

### 6.53.4 Original Concept

I’d like to thank Dr Michael Carnell for his contributions to create the induction process feature. Here is the example of the conceptual diagram of the induction process form.
Upon the implementation of QR codes, ACLS is the second to none on the market to use QR codes for lab management system.
6.54.1 What is QR Code?

If you’ve never heard the term before, you may be scratching your head right now. While the more Internet savvy may already know, for those who don’t, here’s what a common QR code looks like:

6.54.2 Advantages of the QR Code

- The QR code can store up to a hundred times more information than barcodes, QR codes can be fixed or dynamic, and QR codes can be scanned from any direction.

- All smartphone camera is installed with QR reader, alternatively, a QR code reader app can be downloaded onto a smartphone by anyone, and they are mostly free of charge. This means that any customer can walk into your business with his or her smartphone, and scan a QR code which you have generated.
• Possible QR Code Applications

Now, let’s look at some business-related scenarios where you would use QR codes.

- Use a QR Code to direct a customer to the URL for your website, Facebook, Twitter or other social media page.
- Use it to share a text message (anything from “Happy Holidays!” to “Have you seen what we have upstairs?”)
- Use it as a discount code to be taken to the checkout counter for 10 percent off, for example.
- Use it on your business card with your contact details embedded inside the code.
- Use it to link to a Google Maps location for your new store location perhaps.
- Use it to link to a YouTube video or channel perhaps demonstrating new products or funny company videos.
- Use it to link to an app store download (perhaps of your company’s latest eCommerce app?)
- Use it to embed pricing for your products as an alternative for more conventional price tags.
- Put it on your website’s “contact us” page allowing people scan it and get your contact information direct on their phones.
- Put the code on the tables and walls of your restaurant as an easy way for customers to send off a Foursquare or Facebook status update.
- Put a code on your restaurant’s takeout menu allowing customers to scan it with their phones and instantly call to place an order.
- Put a QR code at the end of promotional videos taking viewers to a landing page on your website.

6.54.3 ACLS QR Code Applications

ACLS is launching the QR codes for resources and consumables. This provides a creative new way of engaging users and researchers to get their phones out and start scanning to book and access the equipment or instruments, to order consumables, to record consumable usages, and to access lab information.

The current implementation of QR codes is to use smartphone camera, QR reader app to scan and operate.

Using phone to scan and operate, is that simple?
6.54.4 Resource QR Codes

Upon the system upgrade to QR code patches, QR codes are generated for all the registered resources.

The QR codes show up at catalogue pages, calendar pages. QR codes can be added to bookmark or home screen on the smartphone, and works anytime and anywhere.

You can print QR codes out using label printer or just normal printer to post in the lab space, or use MoxyTouch app or MoxyTouch screen to show them up electronically.
You can add the QR code to the home screen on mobile phone for future use.

Scan and QR code taking you to the selected resource page on the smartphone.
Lab staff ask how we print out all the QR codes for the resources or machines. So they could put up QR code in the lab space or onto machines. Scanning QR codes become part of life due to the COVID-19 outbreak, users and researchers could just scan machine QR code to check bookings, make bookings and access lab information.
On Resource Manager page, you are able to print all resource QR codes on a single page, print to a printer or PDF is your choice.

6.54.6 Consumable QR Codes

QR codes are extremely effective for consumable order, recording and tracking. Scan and record in the lab during the experiment.

Scan and QR code taking you to the selected consumable page on the smartphone.

6.54.7 Generate QR Codes

After you add a new resource, go to Resource Manager edit page to generate QR codes.
The same way for new consumables.

6.54.8  **Printable consumable QR code list**

Similar to the printable resource QR codes, you could do the same to the consumable QR codes on Consumable Search page.
6.55 Watch Social Distancing at Lab Space (COVID-19)

Space booking with the concurrent user limit at work space would be complying with CONIV-19 social distancing regulations. You are able to link any resources to any spaces so to set up the user number control for space booking.

- Case study #1:

A lab space housing 5 tools, only allow 4 users working at lab space concurrently due to the social distancing regulations. 5 tools were listed under different resource groups in ACLS.

Can you set up the space linking to tools in the different resource groups? Yes, you can.

- Case study #2:

A lab space housing a number of tools, for some reasons, you want to stop users making any bookings to the lab space.

Can you turn off the entire lab space to accept any new bookings? Yes, you can. Just set the user limit to ZERO, no further bookings will be accepted.

- Case study #3:

There are lab space and resource group in ACLS. What are the relationship between both? They work separately linking with the tools or resources. Hence, you can set up a resource group and a space linking with the same clusters of the tools or resources.

The following flow chart explains how space booking works.
6.55.1 Set up spaces

Go to Staff tab -> Resource Manager -> Office/Lab Space.
You can add/edit space properties.

You are able to link resources to the defined space.
6.55.2 How can we link a resource to space?

As explained in the last chapter, you can link a resource to a space in the space editor. Alternatively, you are able to go to the resource editor to link the resource to any space.

6.55.3 Space booking – resource calendar

If the space booking is enabled, a space booking dashboard is available on the resource calendar page.
Click on Space Bookings button, space booking information page pops up. Users are able to scroll through space bookings in day view.
### ICP B39

Concurrent user limit: 1

Sunday, Jun 07 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Concurrent Users at Space</th>
<th>Vacancy</th>
</tr>
</thead>
<tbody>
<tr>
<td>0:00</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>0:30</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>1:00</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>1:30</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>2:00</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>2:30</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>3:00</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>3:30</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>4:00</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>4:30</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>5:00</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>5:30</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>6:00</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>6:30</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>7:00</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>7:30</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>8:00</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>8:30</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>9:00</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>9:30</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>10:00</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
<tr>
<td>10:30</td>
<td>1</td>
<td>vacancy: 0</td>
</tr>
</tbody>
</table>

#### 6.55.4 Space booking – timeline calendar
6.55.5 Is space booking about limiting the bookings?

No, space booking is about limiting the number of the concurrent users working at a lab space. It is not about limiting the booking numbers. In the above example, space B39 only allows one user working at lab space at any time, same user can book many resources or tools at the same lab space, the user number still counting as one.

6.55.6 What calendars are applied to space booking feature?

Space booking only applies to resource operation calendars and timeline calendars. The other calendars using by staff members are not part of space booking. Staff members are trusted to add new bookings with the social distancing in mind to limit the concurrent number of users working at the same space.

6.56 MoxyTouch Service (Powered by UniLab)

Moxytouch is a cloud based solution connects and casts to any screens anywhere in the world (https://moxy.unilab.com.au/moxytouchsite/). Container and DIY widgets provides a flexible option to set up screen contexts, including the feature of social distancing management and notification for work space, lab space and office space.
We collaborate with UniLab to deliver digital and smart lab solutions to research institutes, labs and communities.

6.57 Live ACLS Charts to MoxyTouch

In addition to streamline the calendar data to Moxy for onscreen update, you are able to streamline the lab data analytics to Moxy as well.

- Growth charts

Growth charts demonstrate the trend of the user growth over years, and over months in the selected year. Using the charts, lab can foresee the future growth potential and provide a better strategy to meet the research demands.
- Population charts

Population and geographic charts indicate the user population distributions. Using the charts, lab can work out a better strategy to meet the research demands of the major research groups.

- Training charts

Training charts show the training records over years, and over months in the selected year. Using the charts, lab can foresee the future training demands and work out a better way to meet the training demands.

- How to Set Up Labcast Data Dashboard to Moxy
Upon login to ACLS, go to My Labcast to get started.

Simply tick the checkboxes to choose.

The result of example shows here.
How to Set Up Moxy

Go to Dashboard container to set up dashboard.

You can preview the live dashboard on your desktop. Please contact us and UniLab support if you wish to know more.
6.58  Live ACLS Calendars to MoxyTouch

Through MoxyTouch and Labcast, **LIVE** booking calendars can cast to one or multiple display screens and kiosk touch screens. You can set up the screen at the entrance of the lab, PC2/PC3 labs, or clean rooms so users and staff can view the current bookings before entering the lab areas. It works like airport arrival and departure display board. Currently, Labcast provides two calendar theme, standard (white background) and dark (dark background) as shown below.

- **Standard Calendar theme**

- **Dark Calendar Theme**
Operating ACLS

Dark theme suits for darker lab area environment, such as microscopy rooms.

Labcast feature is only available to lab staff. To set up Labcast, you need to configure the Labcast in ACLS and also sign up to MMoxy service.

- Set up Labcast in ACLS

Upon sign in to ACLS, the landing page shows Labcast feature tile.

Labcast is a unique feature to all staff members. It provides a live calendar cast of the interested resources to a display screen, be a desktop, a laptop, a tablet, or a standalone screen via a cloud service.

Click on My Labcast to set up resource casting calendars. You can go with a single resource calendar or group any resources as you wish. Recommend that each cast limits to no more than 15 resources. Labcast service can show any number casts as you wish, so you don't have to cast more than 15 resource calendars onto a single page.
That is all you need to do in ACLS!

- Set up Labcast in Moxy

Moxy service powered by UniLab is implemented and available to operation at [https://moxy.unilab.com.au/](https://moxy.unilab.com.au/).

To publish your media containers to screens (indoor or outdoor), you need to have a cast unit, a name card size box, each device comes with unique ID. The device is powered by a USB connection to the PC or the monitor, or small power adaptor. Connecting HDMI cable to the monitor, and turn the cast unit on, it goes to the selected casts straight. This is the elegant plug and play solution provided by UniLab.

Please contact UniLab at support@unilab.com.au to request for a cast unit.

### 6.59 Consumable and Resource Widgets with MoxyTouch

The data sharing between Moxy service and ACLS is completed, so lab users and staff can take advantage of the QR codes on touch screen to record consumable usages and to access resource information and edit resource bookings.

- **MoxyTouch - Resource QR Code Operation**

Working with UniLab, a digital and responsive resource QR code is implemented through Moxy Widget -> Resource QR Code Widget.


- **MoxyTouch - Consumable QR Code Operation**

Working with UniLab, a digital and responsive consumable QR code is implemented through Moxy Widget -> Consumable QR Code Widget.

6.60 Staff Roster Calendar with MoxyTouch

In response to CONIV-19 outbreak, staff roster calendar is implemented and can be shared with Outlook and MoxyTouch (physical or virtual screen).

Step 1: select staff on rosters. Go to Staff tab -> User Profile -> Staff Roster Profile Manager, enable to turn on roster, disable to turn off roster.

Step 2: set up roster calendar, go to Booking tab -> Staff roster calendar to start. ACLS sends out the email notification to all staff on rosters for any changes on roster calendar. You can export the calendar to Outlook or MoxyTouch. For Outlook, it is rather personal to see the shared rosters. For MoxyTouch, it can provide a public URL for display on website or just email the URL to anyone to view the staff rosters.

Week view is the best option for full day roster bookings.
• Can any staff edit any roster bookings?

Yes, the roster calendar has no booking limit or controls.

• Export to Outlook

There is a URL available in the roster calendar and set up instructions for Outlook. Here is a screen print for example.

http://129.94.165.51/localrosterCalendar.w1kF9gF7s3bN7q8WEWluAjnN2QxDO3.ics

Export to Outlook Tips:
1. Open Outlook;
2. Go to calendar;
3. Add calendar -> From internet;
4. Copy and paste the above url to the location field, and click Ok to save it;
5. To reload the calendar, click on Send/Receive button on Outlook.

Similarly, you can export to Google calendar.

• Export to MoxyTouch

MoxyTouch is a responsive and DIY screen solution provided by UniLab. Here is the advice on how to connect with MoxyTouch at https://moxy.unilab.com.au/moxytouchsite/accessmoxytouchhow.php.

Step 1: Go to Moxy Container -> Widget -> Outlook Widget to copy and paste roster URL to the outlook calendar container

Step 2: Go to MoxyTouch -> MoxyTouch Single Screen to publish the calendar

Step 3: Preview Moxytouch

Step 4: Copy the public URL to use for email broadcasting or on website.
One MoxyTouch can provide more features than a single roster, you are encouraged to use it more for other dashboard and information sharing.

- Can general users access the staff roster after login to ACLS?

  Yes, system admin needs to copy the MoxyTouch public URL to the ACLS global parameter panel by System Settings -> Configure System, the parameter field name is StaffRosterURL.

- Can we turn off the email notification as all staff can access Staff Roster Calendar anyway?

  Yes, system admin needs to disable the parameter panel by System Settings -> Configure System, the parameter field name is EnableStaffRosterNotification.
6.61 User Training Records with MoxyTouch

Similar to the consumable and resource settings, you are able to connect ACLS to Moxy service to display user training records for staff and safety officers to check onsite.

6.62 Plug-In Modules

Plug-in modules form 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>Batch Data Report Tool</td>
<td>\textit{bDRT} enables ACLS to produce reports in bulk mode. Further integration with \textit{eDM} is required.</td>
<td>Implemented</td>
</tr>
<tr>
<td>Batch Invoice Statement Tool</td>
<td>\textit{biST} enables ACLS to generate invoice statements in bulk.</td>
<td>Implemented</td>
</tr>
<tr>
<td>Hub Trust Node</td>
<td>\textit{hTrustNode} 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 resource status and other information.</td>
<td>Implemented</td>
</tr>
<tr>
<td>iCal Protocol</td>
<td>\textit{ICAL} enables the export and sharing of the booking calendar with local calendar applications, such as Outlook, Thunderbird, Macmail.</td>
<td>Implemented</td>
</tr>
<tr>
<td>Mobile Access</td>
<td>\textit{MobileLight} is a smart mobile application for iPhone, Android and Windows mobiles.</td>
<td>Implemented</td>
</tr>
<tr>
<td>Survey Creator</td>
<td>\textit{iSurvey} allows you to conduct surveys, to create, publish, and analyse the results.</td>
<td>Implemented</td>
</tr>
<tr>
<td>Publication Analyser</td>
<td>\textit{iPublication} allows you to collect the publication information and to analyse.</td>
<td>Implemented</td>
</tr>
<tr>
<td>LDAP</td>
<td>\textit{iDAP} enables ACLS to integrate with the organization-wide active directory authentication scheme to realize single web access authentication.</td>
<td>Implemented</td>
</tr>
<tr>
<td>Training Event Booking Tool</td>
<td>\textit{iEB} is the training booking tool</td>
<td>Implemented</td>
</tr>
<tr>
<td>User Event Booking Tool</td>
<td>\textit{uEB} is the user booking tool</td>
<td>Implemented</td>
</tr>
<tr>
<td>Video Player</td>
<td>\textit{vPlayer} is the video player and admin tool</td>
<td>Implemented</td>
</tr>
</tbody>
</table>
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 or Reset Password on Login Page.

   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 user photo to expand and click Logout button as shown below.

3. What is the new login page script?

   The new login is a separate script for each ACLS, it can be adapted to meet demands to handle different authentication methods, cloud authentication, AAF, and 2 level authentications.
7.2 Online Registration

4. 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.

5. 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.

6. 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.

7. How do we set up a resource of interest in the online registration process?

You set up a resource list for online registration through Resource 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 resource list for online registration, it automatically adds a resource page to the registration process.

8. 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.

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

Four 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 form at registration.

10. How can we set up user photo upload in online registration?

The control parameter is at Configure System, tick the checkbox of User Photo For Reg to enable the user photo upload in online registration.

11. Are there any photo sized restrictions?

No, users can upload any sizes of the photos and system re-sizes automatically.

12. How can we register to ACLS nodes on ACLS SSI?

As SSI centralises the access to multiple ACLS nodes, for new users, click Here to go to ACLS node list for reg.
13. When I approve user registration, I am told by system that user is already registered, why?

The following screen print indicates that the same user email address was registered already. You can search user with the full range to reactivate or update user profile.
7.3 Booking

14. One of users cannot make bookings, I checked his profile, seems everything is correct, why?

Most likely, the user has not been given an account. System won’t grant the users to book unless the billing account (might be a dummy account) is linked to the user profile.

15. When I open resource calendar, calendar shows up a blank page or distorted, what should I do?

This is caused by the browser cache, please clear the browser cache.

16. 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.

17. How can I move to different days quickly other than clicking on prev/next button?

Add-on calendar is implemented to calendar page as shown below.
18. I am unable to make bookings as I wish. What are my booking limitations?

You are able to see your own booking quota through the Information Panel on booking calendar page.

<table>
<thead>
<tr>
<th>Booking Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Max Allowed Booking Hours/Day: 24</td>
</tr>
<tr>
<td>Max Allowed Booking Hours/Periods: 1348</td>
</tr>
<tr>
<td>Allowed Booking Period: 24/08/2020 to 22/11/2020</td>
</tr>
<tr>
<td>Booking Start Time on Day: 0:00</td>
</tr>
<tr>
<td>Booking End Time on Day: 24:59</td>
</tr>
<tr>
<td>Booking on Weekends: Allowed</td>
</tr>
<tr>
<td>Min Hour per Session:</td>
</tr>
</tbody>
</table>

19. Can I book a resource 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 resource.

20. 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.

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

You need a training certificate to be able to make bookings with a resource. By go to Dashboard -> My Training Records, you can check your records and also find the trainers for the particular resource.

If you do have a training certificate, then click on My Bookable Resources on Booking Tab to clear the system cache and reset the booking resource list.
22. Why can users make bookings for a resource even without training certificates?

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

23. 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.

24. 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.

25. 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.

26. 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.

27. 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.

28. If a user make 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).

29. 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 PDF Icon button to generate a PDF format of the calendar.

30. If we have many resources for booking, can we display them in the order of resource groups?

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

31. 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.
Frequently Asked Questions

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 resources. 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 resources outside their own unit.

32. 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 defined in the training certificates. There are two ways to check certificate settings, via User Profile Manager, or via Training Manager.

33. 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 training certificates, and nothing to do with the resources.

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

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

Yes, you can do this through User Booking tool.

35. 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 Enable Various Booking Calendars.

Check the functions you wish to make available to staff and users.
36. 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.

37. 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.

38. 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.

39. What is iCal?

iCalendar (iCal) is a computer file format that 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.

40. How do I turn off the compulsory booking confirmation for a resource?

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

However, you can switch off the compulsory booking confirmation. Go to Resource Manager and simply uncheck the box Compulsory Booking Confirmation.

41. 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.

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

Yes, go to Calendar Settings to make the change.
43. 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 is blocked until 5pm. However, you can allow current hour booking permission by changing the parameter Enable Current Hour Booking Change through System Settings -> Configure System.

44. Can I set different booking time intervals for different resources, for example, instrument A for one hour, instrument B for 15 minutes?

Yes, through Resource Manager, you can set a minimum booking unit for each resource.

45. 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.

46. 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.

47. 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.
48. Can I change an “approved” booking to “unapproved”?

No.

49. What does system tell me if I see the following booking error message?

![Booking Error Message]

The message means that users certificate only allows them to book no more than 2 days in advance. Please check training certificate settings.

50. How can I approve bookings?

There are 3 ways to get an unapproved booking.

- Direct approval link in the email
- Approve the bookings on Calendar page
- Approve the bookings on Dashboard

51. 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.

52. Is there any way of changing the settings so that future bookings can be made more than 3 months in advance?

Yes, you need to change the settings of training certificates to extend the max days/period to more than 90 days.

53. Can I book multiple resources on the same calendar page?

Yes. Resource timeline calendar offers the solution.
54. We run a few hundreds of resources. When I book a lab event, I close all resources for bookings for the lab event time. However, if I want to open a few resources for bookings, how can I do so?

Only system administrator can do so. Go to System Settings -> Configure System -> Booking Correction to cancel the lab event bookings.

55. Are we able to subscribe to receive emails when someone cancels a microscope booking?

Yes. At Information Panel on calendar page, you can set up email notification for booking cancellation so you are able to fill up the bookings. This is handy way to receive the reminder and book the heavily booked resources.

56. Can you advise why bookings are not working when using phone/QR method but they do work on the computer?

This is mainly caused by incorrect QR codes. Admin can re-generate QR codes for resources.

7.4 Group Booking

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

Yes.

58. Can Group Bookings be cancelled?

Yes, however, you can only cancel a group booking made by yourself. If you want to cancel a group booking made by other staff, please do so through Service Booking.
59. Are Group Bookings included in reports?

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

7.5 Update User Information

60. 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 contacts and to change password at My Profile.

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

61. 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.

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

This happens if User Photo Availability Check 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, the parameter Deactivate If No
Picture Period settings, then that user’s access to the system is deactivated automatically. However, this does not apply to System Administrators.

63. Is it possible to restrict certain user access?

Yes, uncheck the box activate user entry through User Profile Manager.

64. What would be implications for double profiles to the same user?

Sometimes, the same user registers twice over a long period of time, and admin does not check against record properly. System does auto-check against email address to prevent double profiles, however, the user may use the different email address to skip the auto-check. When staff select the user from dropdown list for different jobs, system may pick one out of two profiles; for example, when you set up a certificate to a user, staff may select the wrong profile. As the result, the user cannot book the resource.

65. What should I do if a user has attempted to register an account when she already has one?

This user profile is expired in system, simply reactivate her, then delete her reg.

7.6 Update User Supervisors

66. How can I set up supervisors for a user?

Go to User Profile Manager, find the user and then go to Supervisor tab to Edit User Supervisor.

Click on the button and you can add multiple supervisors, but you can only set one of them as the ‘default for invoicing’ supervisor.
67. **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.

68. **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.

69. **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.

70. **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.

71. **Can I set supervisor as inactive since the supervisor leaves the organisation?**

Yes. You can set to active or inactive by ticking the checkbox of **Status**.
7.7 Data Report and Invoice

72. 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.

73. 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.

74. 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.

75. 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.

76. We deploy ACLS tracker to track the true usage of research equipment. Can we see the booked hours and tracker hours on the report?

Yes. Go to Report Manager -> Resource Booking Report -> Booking Report By Resources to see both hours.

7.8 Batch Data Report

77. 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 resource, 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.
78. 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 resource running reports.

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

80. How can we access the generated reports?

Go to Report Manager -> Resource 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.

81. 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.

82. 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 reporting and invoicing modules so no others can run the reports and invoices at the same time.

When the process is complete, the system resumes reporting and invoicing modules.

83. How can I access the EXCEL files generated previously?

Click on Report Manager -> Archived Excel Files to access, then click each link to expand for details.
84. Can the invoice statements be PDF instead of HTM?

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

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

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

86. 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.

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

Please contact us to discuss this further.
7.9 Manage Account Budget

88. 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.

89. 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.

90. 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.

91. 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.

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

The current version only offers manual rollovers.

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

Budget Manager is designed to assist you in managing account cash flow 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.

94. Can an expired budget envelop be reactivated?

Yes, you can reactivate budget envelopes that have expired within the last 3 months.
7.10 User Training & Certification

95. 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 profile page. Go to Certificate tab, Edit User Certificates.

A trainer can only issue a certificate for the resource for which he/she is certified as a trainer.

96. 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.

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

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

98. How do I know I am a trainer for certain resources?

There are two places you can check for this:

- Dashboard -> My Training Records
- Booking -> Resource Trainer
- User Profile Manager -> User Profile -> Trainer

System shows you for what resources you are listed as trainer.

99. 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.
100. 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 trainers and certificates. Go to Resource Manager -> Booking Resource Chart.

101. I want to give a resource 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 resource. Go to Utilities -> Training Manager to set up a trainer.

102. The staff is set as the equipment trainer. When he goes to user profile, why can he not see the certificate in Edit User Certificate as show below?

The possible cause is that either you haven’t set up the training certificate, or the certificate is disabled.

103. I’m trying to find out how to get a list of certificate holders for a particular piece of equipment so I know who has booking rights and who doesn’t. Where can I find this?

There are two ways to get this information.
Go to user profile manager, click on full search button to open the full search panel, then select the certificate of that instrument to find all holders

Or,

Go to utilities -> training manager, select the resource and click on ‘certificate registration’ to see the certificate details, click on the marker to see the holder details.

7.11 Register Forms and Documents

104. 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.

105. 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 Dashboard, and each user can access their own forms and documents when they logon to ACLS.
106. What if I want to restore removed forms?

*Click on Deleted Form Records to restore. However, you can only restore the forms that have been removed within the last year.*
107. 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.

108. What documents should I upload as general documents?

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

109. What should I upload as resource documents?

Resource documents are grouped per resource. Examples of documents are instrument operation guide, tutorial materials, etc.

110. Should I upload resource maintenance contracts, or service agreements as resource documents?

No, you should not. Resource Contract Depository will be provided in the future.
111. What is the maximum file size for upload?

The maximum size is 20MB per file.

112. 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.

113. What is the difference between documents and forms?

There are two categories of documents: general and resource. But the forms are linked to users.

7.12 Track Training & Support Requests

114. 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.

115. 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 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

116. 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 not checked-in.

117. 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.
118. What is the size limit for file uploading?

It is 20MB. For larger files, the use of FTP is recommended. Contact the ACLS System Administrator.

119. What kind of files can I upload?

ACLS supports the following file formats when uploading:

- xls/xlsx
- doc/docx
- pdf
- zip

120. 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.

121. 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.
122. How can a customer or user download results through the system?

Click Access Sample Reports on Dashboard to go 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 Tracker

123. What if there is no communication between the tracker and the ACLS server?

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

- Loss of network
- ACLS server down
- ACLS server rejecting tracker request due to the incorrect server IP configuration
- Network Firewall

The tracker has a built-in feature that detects connection with the ACLS server at all times.

<table>
<thead>
<tr>
<th>Resource</th>
<th>IP Address</th>
<th>Tracker Installation</th>
<th>Tracker Connection</th>
<th>Tracker Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>300 NWR - Bloch</td>
<td>129.94.105.116</td>
<td>Installed</td>
<td>Connected</td>
<td>5.7</td>
</tr>
<tr>
<td>300 NWR - Gym</td>
<td>N/A</td>
<td>Not installed yet</td>
<td>Disconnected</td>
<td>N/A</td>
</tr>
<tr>
<td>300 NWR - Pwex</td>
<td>N/A</td>
<td>Not installed yet</td>
<td>Disconnected</td>
<td>N/A</td>
</tr>
<tr>
<td>400 NWR - Prodigy</td>
<td>N/A</td>
<td>Not installed yet</td>
<td>Disconnected</td>
<td>N/A</td>
</tr>
<tr>
<td>ProcLab Computer 01</td>
<td>129.94.104.140</td>
<td>Installed</td>
<td>Connected</td>
<td>5.7</td>
</tr>
<tr>
<td>ProcLab Computer 02</td>
<td>129.94.104.141</td>
<td>Installed</td>
<td>Connected</td>
<td>5.7</td>
</tr>
<tr>
<td>ProcLab Computer 03</td>
<td>129.94.104.142</td>
<td>Installed</td>
<td>Connected</td>
<td>5.7</td>
</tr>
<tr>
<td>ProcLab Computer 04</td>
<td>129.94.104.143</td>
<td>Installed</td>
<td>Connected</td>
<td>5.7</td>
</tr>
<tr>
<td>ProcLab Computer 05</td>
<td>129.94.104.126</td>
<td>Installed</td>
<td>Connected</td>
<td>5.7</td>
</tr>
<tr>
<td>ProcLab Computer 06</td>
<td>129.94.104.126</td>
<td>Installed</td>
<td>Connected</td>
<td>5.7</td>
</tr>
</tbody>
</table>

124. Why does the tracker open the 'Staff Authentication Page' on user login?

If you set the training certificate of the resource 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.

125. What is the use of tracker reload button on tracker app?

This is designed for re-run the app if the app connection to the web server is lost.

126. What can tracker do if users always forget to logout?

Auto-logout feature is available for tracker, Admin just need to enable this feature and set up the auto-logout timer.

7.15 LDAP

127. Where can I find LDAP implementation information?

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

128. 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.

129. 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 Administrator. Then the System Administrator can respond to the system in case of LDAP failure.

7.16 Conduct Surveys

130. What is the difference between running a survey at Login Page and at Dashboard Page?

- If you choose to run a survey at Login Page, firstly, the same users could submit multiple times to the survey. Secondly, the system generates an external link access to the survey, and you can broadcast this link to all users to participate in the survey.
- If you choose to run at Dashboard Page, firstly, it means that users can respond to the survey only upon login to the system. Each user can only respond to the survey once, as the system automatically switches off the survey to each user when they have responded. Secondly, there is no external link access to the survey.

131. How can I set up a survey to targeted users?

You need to set two parameters as following:

- Set Access Survey to Login Page
• Set **Access Survey** upon login

> Then you simply broadcast the access link shown at the publishing survey page to the targeted users.

132. **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.

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

134. **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.

135. **What does it look like when the survey is published to the Login Page?**

> Depending on the number of surveys, the snapshot below shows one survey at Login Page.

136. **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 numbers are growing all the time. Without locking, you cannot compare the response rate with that of other surveys. Reset to unlock.

### 7.17 General

137. **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
138. 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.

139. Can I set up a resource group without assigning any resources?

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

140. Can I clone a resource or tool?

Yes, go to *Resource Manager* to clone.

141. Can I delete a resource group?

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

142. What if I cannot find the staff to nominate the ownership of a resource group to?

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

143. What is the difference between resource group owners and trainers?

Owners can set up trainers. To issue 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.

144. Can the owner set himself as the trainer?

Yes.

145. What if my resource log time is incorrect?

Please contact the relevant ACLS support staff member for further action. Please refer to *Chapter 6.21 Edit Booking Data and Usage Log Data*.

146. What happens if I set the resource to ‘inactive’ through ‘Resource Manager’?

Only active resources 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 resources.

147. What is the explanation for Bookable and Operation Status listed in resource 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. If ‘status’ is set to inactive, bookable is turned off at the same time.

148. 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, ie. 3 hours x 7 hours.

149. 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.

150. 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.

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

Please refer to Chapter 5.5 Upload System Files for details.

152. How do I check ACLS web portal access information?

Go to Configure System, click on Access Records button to check the last 100 access records.

153. How does the scrolling text announcement work?

Go to System Settings -> Announcement - Scrolling Text, enter the message. Please note that messages must be completed within one paragraph and a single quote is not accepted. Remember to select the Enable Scroller option before saving.
154. How does the popup message announcement work?

Like the scrolling text setup, when it is set up correctly, an announcement popup message window displays when a user logs in.

155. 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.

156. 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
- Resource Manager: Only one default resource
- Group Manager: Only four default groups
Frequently Asked Questions

- School/Org Manager: Only one default school
- Resource Login: Only one default for example

157. We have ACLS configured for booking only. Why do we need tracker installed over the resources such as instruments?

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

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

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.

159. 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 on resource 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.

160. 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 Home Page Link to point to your home page.

```
HomePageLink https://www.nmr.unsw.edu.au
```

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.

161. 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 the receivers' name and email address, senders' name and email address, subject and resource.

162. Do I have to manually type holidays into the calendar each year?

Not necessary. You can click on Copy Public Calendar to 2018 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.
163. 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.

164. 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 can (staff CAN NOT) set up a training certificate and trainer to the resource he is listed as trainer for. In other words, the equipment supervisors can manage their own resource training set up without the need to contact admin.*

165. Where can we find the Terms & Conditions?

*On Dashboard, you can access Terms & Conditions. The details of Terms & Conditions can be seen on the fly modal window.*

---

**Terms & Conditions**

While working in the Biological Resources Animal Holding and Imaging Facility, all users are required to comply with the University’s occupational health and safety (OHS) procedures. Users are required to advise staff as soon as possible, or at least 24 hours prior to a booking if they wish to cancel. Failure to do this may result in the booked time being charged to the project. Users may only log time on equipment with the approval of their supervisor(s) and access fees will be charged for all logged instrument time (unless otherwise specified). Failure to appear on time (within 30 minutes) for a booking will forfeit the booked sessions unless staff are notified that you will be late.

All individuals must receive an induction to the facility from the animal technician in charge of the area where your animals are housed prior to entering the facility for the first time. All users of imaging equipment must receive appropriate training and approval to use the instruments from Carl Power or Alan Know.

Users agree not to provide access for unregistered users without the specific written permission from Carl Power in relation to the Animal Imaging Facility or the senior animal technician in relation to Animal Holding rooms and related equipment.

Users are not allowed to train other users, whether they are registered or not, unless written permission to do so has been granted for specified instruments by Carl Power. Users are not permitted to undertake any work that is not directly related to a project that Carl Power has approved in the Animal Ethics Committee and (ii) specifies the user as a researcher on that project.

Users agree to accurately complete all record keeping required by the facility to monitor the use of instruments including electronic or paper log books and booking systems. Users agree to report all faults or irregularities in equipment to a staff member of the facility. Samples are the responsibility of the user and the facility does not accept any responsibility for loss of damage of materials etc., left in the facility. Data is the responsibility of the user and the facility does not accept responsibility for loss or damage of data that has not been removed/copied/archived. Any work that is published or publicly presented, including theses, where all or a part of the work was undertaken in the facility, should acknowledge the role of the facility in providing access or assisting in the work.
166. Can we remove or stop the ongoing induction process to the user?

Yes, go to user profile, and cancel induction.

167. When I approve the induction process to the user, could I re-do after my approval is granted?

Yes, you can roll back.
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: resource, knowledge, expertise, solutions, reports and data
- Connection: secured access, live connection with individuals or groups

<table>
<thead>
<tr>
<th>New Features</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Azure AD SSO</td>
<td>Support Azure AD authentication</td>
</tr>
<tr>
<td>System configuration wizard</td>
<td>In addition to Resource 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>Task manager</td>
<td>Providing the tool so lab admin and managers can distribute jobs across the units or institutes.</td>
</tr>
<tr>
<td>ROS integration</td>
<td>Integrate with the university research output service so users and staff publications can be automatically updated in the ACLS user profiles</td>
</tr>
<tr>
<td>Finance integration</td>
<td>Integrate with the university finance system to do the live account validation upon users making bookings</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>resource session data integration</td>
</tr>
</tbody>
</table>

8.2 Research Equipment Management System (REMS)

ACLS has been designed and run as a single node and enclosed system. The demand to run an institutional-wide REMS is growing. The new ACLS Enterprise Solution, namely REMS, will provide an institution-wide REMS with the flexibility to maintain customized control to meet the individual lab demands due to the differences in the nature of research and science.

The following diagram shows the hosting conceptual design (indication only).
App server runs with multiple instances to provide the full capability of backend server. The following diagram indicates the full service instances of the app server. More instances can be added to expand REMS capabilities.
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).

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 MCN, in accordance with ANFF documentation, is indicated below in Table 1.

Table 1: Pricing regimes for basic access to MCN

The key for the pricing schedule is listed below and correlates with the user category

<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>

Basic consumables are included in the cost price, however, specialized 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 subsidized access to the resource 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.

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 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 organization’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>$200</td>
</tr>
<tr>
<td>POLYMER SYSTEM</td>
<td>3-7hrs</td>
<td>$ 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 Utilities -> 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 Resource**

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

- Go to **Resource Manager** to set up charge category for each resource:

<table>
<thead>
<tr>
<th>User Category</th>
<th>Charge/Hour ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry (AUS)</td>
<td>100.00</td>
</tr>
<tr>
<td>Industry (non-AUS)</td>
<td>100.00</td>
</tr>
<tr>
<td>Public Funded Researcher</td>
<td>40.00</td>
</tr>
<tr>
<td>University (AUS)</td>
<td>40.00</td>
</tr>
<tr>
<td>University (non-AUS)</td>
<td>100.00</td>
</tr>
</tbody>
</table>

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 resource 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.

Then follow the charge category setup page as below:

Select the resource, 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 on 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.

![Charge Category Manager](image)

Then map the relationship.

![Type of Researcher vs Charge Category](image)

Following approval of online registration, the system automatically sets up a user charge category for each resource accordingly. However, if there is no relationship 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 Resource**

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

In **Resource 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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Facility</th>
<th>Charge Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dong Zheng</td>
<td>AC/DC Sputtering</td>
<td>University/ Private Funded Researcher Assisted</td>
</tr>
<tr>
<td>jack test</td>
<td>AC/DC Sputtering</td>
<td>University/ Private Funded Researcher Assisted</td>
</tr>
<tr>
<td>test ok</td>
<td>AC/DC Sputtering</td>
<td>PhD Student Assisted</td>
</tr>
<tr>
<td>trash test</td>
<td>AC/DC Sputtering</td>
<td>PhD Student Assisted</td>
</tr>
</tbody>
</table>

Total: 4

This tool only sets the default charge category to those users who have not been assigned a charge category for a resource.

9.1.7 Resource vs Charge Category

Upon clicking on Resources 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

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

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

- **Submission page**

With respect to the standard, a confirmation checkbox has been added on the final confirmation page of the 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 **Utilities → 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 **Unassisted and Assisted Bookings**

The following booking functions are done for MCN to replace the standard Resource 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 shown below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Assisted Event</td>
</tr>
<tr>
<td>User</td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td></td>
</tr>
<tr>
<td>Question? IS THIS WORK LINKED TO INDUSTRY?</td>
<td>Is this booking related to a project or activity with an industry partner (e.g. ARC linkage grant, contract, etc.). Note: this is for reporting purposes only. A selection of YES will NOT alter the instrument charge category</td>
</tr>
<tr>
<td>Must Choose YES or NO</td>
<td>Yes</td>
</tr>
<tr>
<td>Staff Time Facility</td>
<td></td>
</tr>
<tr>
<td>Staff Time Account</td>
<td></td>
</tr>
<tr>
<td>Staff Time Hours</td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td></td>
</tr>
<tr>
<td>Booking for Training</td>
<td></td>
</tr>
<tr>
<td>No Mail to User</td>
<td></td>
</tr>
<tr>
<td>Full day</td>
<td>12:00</td>
</tr>
<tr>
<td></td>
<td>13:00</td>
</tr>
</tbody>
</table>

A few new concepts are introduced to this template:
Appendix A – Modification for ANFF

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

9.1.13 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.

9.1.14 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.

9.1.15 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 resource if the “Black Listed” setting in the user profile is checked.
9.1.16  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 with 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.

9.1.17 Reports and Invoices

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

9.1.18 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 Log.

9.1.19 Broadcast Messages To Newly Trained Users

‘To Newly Trained Users’ is added. Click on To Newly Trained Users to access. As usual, type in subject and message body, select a 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 training in the last two months.

9.1.20 **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.
9.1.21 **MCN Instruments – Hours of Usage**

Hours of Usage summarises the usage each month in the format of MCN requirements. Two options are available: Single resource hours of usage and Multiple resource hours of usage:

The process between single resource and multiple resources is the same. Choose the resource, select start month and end month, then click on **Continue** button.

In the example below, two facilities are selected:
9.1.22 **FOB for User Profile**

FOB tab is added to each user profile, only admin can change FOB properties:

- FOB title
- FOB type
- FOB reg date
- FOB expiry date

All users and staff FOB require expiry date.

Staff and users can view FOB information through *My Profile*.

9.1.23 **Consumable Module Modification**

- Ultimately we want the ability to specify linked consumables when making a booking.
- We already have the ACLS consumables register, where we are inputting various items such as wafers etc., that we can charge to users. What we are missing is the ability for users to "self-select" consumables as a part of their bookings. An example would be a user doing a thin film deposition of Gold. They should be able to book the tool and select how many nanometres of Gold they will use. ACLS should then add that charge to the booking. Another example would be a user booking a spin coating station... this person should be able to specify which photoresist they are using and the number of samples they will process —all of the resists and the charge/sample would be specified in the consumables register.
- I know ACLS has all the basic functionality for this already in place in separate locations, it should just a question hooking them together.
- Resource manager should allow us to set up each tool with the relevant "linked consumables" if applicable. That is, in the booking profile for a tool, we should be able to add a section for consumables. Staff could setup a tool and select: Linked Consumables = YES/NO, and if the answer is YES, we should be able to select items from the consumables register. These items would then show up when making the bookings and the users can indicate how much they are using.
- Some accounts shall be disabled for consumable orders
- Set up default user account as the first option to the unassisted and assisted booking calendar

9.1.23.1 **Accounts Used for Consumable Order**

Admin can set up the account dedicated for consumable orders. In the other words, when users place the orders, they only need to choose the consumable type accounts.
Appendix A – Modification for ANFF

- account manager to include a YES/NO control for whether an account can be used for consumables charges
- default status on an account will be YES.
- MCN staff will manually disable for accounts that should not be used for purchase of consumables
- IMPORTANT: accounts that are NO can still be used for booking of instruments.

<table>
<thead>
<tr>
<th>Account Name</th>
<th>ALEXANDER HEGER (MONASH MATH)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Type</td>
<td>✅  UNSW Account  ☐  External Invoice</td>
</tr>
<tr>
<td>Job Type</td>
<td>✅  Client Job  ☐  Non Client Job</td>
</tr>
<tr>
<td>Used for Consumable Orders</td>
<td>✅</td>
</tr>
<tr>
<td>Discount (%)</td>
<td>0.00</td>
</tr>
<tr>
<td>Note</td>
<td></td>
</tr>
<tr>
<td>Expiry Date</td>
<td>14/06/2035</td>
</tr>
<tr>
<td>Make Account Expired Now</td>
<td>☐</td>
</tr>
</tbody>
</table>

9.1.23.2 Linked Consumables of Resources

Admin can set up consumable list for each resource. If the consumables are set up for the resource, it is compulsory for users to place the orders with the min qty for each booking.

Go to Resource Manager to set up consumables.

Click on Add Linked Consumables to add consumables from the consumable library.
You are able to access the linked consumable page or delete it.

### 9.1.23.3 Linked Resources of Consumables

Admin can see the linked resources on the selected consumables and access the linked resources.

<table>
<thead>
<tr>
<th>Consumable Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-Source Cap Alg</td>
<td></td>
</tr>
</tbody>
</table>

- **Consumable Image**: ![](image)

<table>
<thead>
<tr>
<th>Unit Type (Min Order Qty)</th>
<th>Unit Price</th>
<th>Base Quantity</th>
<th>Render Quantity</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>420</td>
<td>0.02</td>
<td>100</td>
<td>20</td>
<td></td>
</tr>
</tbody>
</table>

- **Linked Resources**: ALD-15H Pk | Linked Qty | Min Order Qty | 
| ALD-15H Pk                  | 12         |               |

### 9.1.23.4 Unassisted Bookings

If linked consumables are enabled for the resources, it is compulsory to order consumable for each booking session. System does not check the order entry for the resources which do not enable the linked consumables.

- Consumable order details are visible on booking tooltips, including order number
- Record consumables
Click on Record Consumable Button on the popup booking form to record or order consumables.
Based on the linked consumable settings to the resource, the new page is open for the user to record consumables and account to the booking sessions.

Then enter the order quantity and the appropriate account, then submit. Then close the page by clicking on the below button and continue to the booking form. System does the check against min order quantity and update the stock quantity.

The consumable orders made by bookings are marked as delivered or closed automatically.

You can see the newly ordered details in the highlighted order panel.
Appendix A – Modification for ANFF

Upon save the bookings, the details of the consumable order or record are shown on the booking form and tooltips.

What if users don’t record or order consumables? System pops up the following alert message.
For those resources which do not set up linked consumables, users make bookings as usual.

### 9.1.23.5 Assisted Bookings

- It is the same mechanism to record the linked consumables. The difference is that system records the consumable orders to the user selected by the staff. Staff needs to select the same user for both the booking and the consumables.
At the recording consumable page, if it is a new booking, you need to select the same user as the selected user for booking.
9.1.23.6 **Timeline Bookings**

- On the timeline calendars, if one of the resource requires the linked consumables, the Record Consumable tooltips show up for all.
- Resource with linked consumables
9.1.23.7 What if the bookings are cancelled?

- For those bookings recorded with the consumables, if the bookings are cancelled, then
  the orders are cancelled either, and stock quantity is adjusted.

9.1.23.8 What if the consumable orders are cancelled?

- Upon cancelling the consumable orders which are recorded with the bookings, the
  bookings remain but the consumable orders are indicated as cancelled in the booking
  calendar.

9.1.23.9 My Orders Recorded BY Bookings

- In general, there are two types of consumable orders, one from shopping carts, and the
  other via bookings. Those orders made by bookings are shown with the booking
  reference on the order summary.
- My Consumable Order button is available on booking calendar page so users can check
  his orders anytime.
### Appendix A – Modification for ANFF

**ALD CNT Fiji**

- Accept future bookings only
- Switch to day/week view by clicking on DATE as link
- Permitted Hours: 0:00 - 24:00
- Account for Booking: MCN STAFF

**Resource Details**
- Calendar Settings
- Booking Quota
- User Contacts
- Color Codes
- Email Notification
- Retrospective Bookings

#### My Consumable Orders

- **Refresh Balance**

#### My Orders

<table>
<thead>
<tr>
<th>Order Number</th>
<th>Date</th>
<th>User</th>
<th>Order Type</th>
<th>Consumable Code</th>
<th>Consumable Description</th>
<th>Unit Quantity</th>
<th>Unit Price</th>
<th>Total</th>
<th>Order Date</th>
<th>Order Status</th>
<th>Cancellation Date</th>
<th>Booking ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Closed</td>
<td></td>
<td>1234567890</td>
</tr>
<tr>
<td>150</td>
<td>2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Open</td>
<td></td>
<td>9876543210</td>
</tr>
<tr>
<td>123</td>
<td>2019</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Canceled</td>
<td></td>
<td>0987654321</td>
</tr>
<tr>
<td>134</td>
<td>2019</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Closed</td>
<td></td>
<td>9876543210</td>
</tr>
</tbody>
</table>

**Balance**

- **Booked**
- **Balance**

---

**AC LAB SYSTEM**

294
9.1.23.10 Consumable Orders Recorded BY Bookings

- In general, there are two types of consumable orders, one from shopping carts, and the other via bookings. Those orders made by bookings are shown with the booking reference on the order summary.

- If the order is made via a booking, the booking details are shown up to the order form for changes and updates.
9.1.24 Booking with time-based consumable usage

Case study:

- Users make a booking on the 3D printer and the amount of 3D printer resin that is consumed depends on the length of the booking.
- It's not always possible for users to know the amount of resin they will consume in their booking so we'd like to have ACLS apply a consumables charge that is linked with the booking time itself.
- For example, John Smith books the printer for 2hrs. The rate for the "3D Printer Resource" is $10/hr. The rate for the time based consumable is set to $15/hr. John Smith will be charged for 2hr*$10/hr+$15/hr)= $50
- This could be accomplished by having the users manually specify how many hours their bookings are (basically by treating the "unit" of the consumable as hrs, but this will allow people to cheat. If ACLS is doing this calculating this charge automatically based on the length of time of the booking, it's much better.

Flow chart:
9.1.24.1 Set up time-based consumable charge rate

First step, go to consumable library, edit the selected consumable profile, a new setting is added as time-based price/hour. ACLS auto-calculate time-based quantity/15 minutes.
The reason to convert from price/hour to quantity/15 minutes is due to the calendar min time scale 15 minutes.

9.1.24.2 Linked time-based consumables to resources

Go to Resource Manager to set up linked consumables including the time-based consumables.
You are able to toggle the linked consumable state between the time-based consumable usage and quantity-based consumable usage.

9.1.24.3 **Time-based consumable usage**

ACLS is scripted to handle the mixed linked consumables to the resource. If the linked consumable is set as time-based, then users and staff don’t need to enter the quantity. System calculates the time-based linked consumable usage according to the booking time.

Select account and save. Then calendar shows the cached result as indication.

Upon saving the booking, the order is auto-calculated according to the time-based rate of the linked consumables. You are able to see the consumable orders with the indication of time-based.
Admin can alter the order even if it is the time-based. However, when the booking is changed, this order follows the change of the booking time as it is part of the booking.

Unassisted booking calendar, assisted booking calendar and time-line booking calendar are modified to handle the time-based linked consumable with the booking time.
You are able to cancel any bookings with the service booking calendar. If the cancelled bookings are saved with the time-based linked consumable, then the respective time-based consumable order is also cancelled.

9.2 Modification for ANFF WA Node

9.2.1 Background

The essence of the problem that we have is that we want to book a tool overnight to reserve the time and ensure that no one else books it, but we do not want for the overnight hours to be counted and reported in the excel usage reports that we generate for reporting of facility usage hours.

We adopt the proposed option “Somewhere in the settings for a tool we tick a box “do not include in excel reporting overnight hours booked between 8pm and 10am.”.

9.2.2 Resource Setting Changes

A special ANFF WA setting is added to the resource profile in Resource Manager to configure the resource for the special reporting hour control.

- Report Enabler: tick to enable the special hour control for report. If unchecked, report hours are calculated as usual. If checked, the report start time and end time are used to calculate. For example, the booked hours from 9 to 16, the report start time is 10 and end time is 15, the calculated usage hours are 5 instead of 7.
- Report start time: starting hour to count as reporting usage or booked hours
- Report end time: ending hour to count as reporting usage or booked hours
9.2.3 Report Manager

Operation and training hour report are implemented with the reporting hour controls.
ANFF WA Hours are added to the report as shown below. Both monthly and period reports are modified. Batch reports applies the same changes as well.

9.3 Modification for ANFF QLD Node

9.3.1 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:
Appendix A – Modification for ANFF

- Online registration submission
- Online registration approval
- Manual user registration by admin staff
- Project membership registration
- Project top up hours tracking
- Project daily updating to remaining hours
- Resource 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

9.3.2 Register Project

Through **Utilities -> 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 Manager](image)

<table>
<thead>
<tr>
<th>Name Category</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australian industry</td>
<td>Australian Industry Funded Contract Research</td>
</tr>
<tr>
<td>Australian publicly funded research agency</td>
<td>e.g., CSIRO or the Australian Synchrotron</td>
</tr>
<tr>
<td>External university</td>
<td>Publicly funded research for non-host universities</td>
</tr>
<tr>
<td>Host university</td>
<td>e.g., NHMRC Projects, ARC Discovery, Data Grants...</td>
</tr>
<tr>
<td>Industry linkage (university)</td>
<td>e.g., ARC Linkage Grants, NHMRC Development Grants...</td>
</tr>
<tr>
<td>International industry</td>
<td>International Industry Funded research</td>
</tr>
<tr>
<td>International other</td>
<td>Research for international clients who are not industry funded</td>
</tr>
<tr>
<td>Other</td>
<td>anything that does not fall into one of the listed categories</td>
</tr>
</tbody>
</table>

- **Step 2: Set Up Charge Tier**

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

  ![Project Manager](image)

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

### 9.3.3 Register Membership

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

<table>
<thead>
<tr>
<th>Supervisor Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Supervisor Manager</strong></td>
</tr>
<tr>
<td><strong>Supervisor Manager</strong></td>
</tr>
<tr>
<td><strong>Supervisor Manager</strong></td>
</tr>
</tbody>
</table>

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

Use the same method as described in the standard ACLS manual, go to **Resource Manager** to set up resources.

Three additional fields have been set up for each resource:

- 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.

9.3.5  **Online Registration**

The three 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.

9.3.6 **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.
9.3.7 **Consumable Resources**

**Consumable Resources** is specially implemented 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.

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

**9.3.9 Search Consumables**

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

There are two reporting tools available:

- Report by Consumables
  - Step 1: Select the time period for report:
    - Order Report By Consumable
    - From: 24/06/2017
    - To: 30/06/2017
    - Continue
  
  - Step 2: Select the consumable from the dropdown list:
    - Order Report By Consumable
    - Select Consumable: Continue
  
  - Step 3: Compile the report:
    - Order Report By Consumable
    - Report Period: 24/06/2017 To 30/06/2017
    - Consumable: 501101
    - Total: $100.00
      - Summary by Reorder
        - Line Item: Total: $100.00
      - Summary by Inventory
        - Line Item: Total: $100.00

- Report by Supervisors
  - Step 1: Select the time period for report:
  - Step 2: Select the supervisor from the dropdown list:
Appendix A – Modification for ANFF

- Step 3: Compile the report:

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

9.3.11 **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.

### Stocktake Active Consumables

<table>
<thead>
<tr>
<th>Consumable Code</th>
<th>Description</th>
<th>Stock Quantity Before</th>
<th>Stock Quantity After</th>
</tr>
</thead>
<tbody>
<tr>
<td>020191 1</td>
<td>Acrylic Perspex 3 mm</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>020193 1</td>
<td>Acrylic Perspex 4 mm</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>020194 1</td>
<td>Acrylic Perspex 5 mm</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>020195 1</td>
<td>Acrylic Perspex 6 mm</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>020196 1</td>
<td>Acrylic Perspex 7 mm</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>020197 1</td>
<td>Acrylic Perspex 8 mm</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>020198 1</td>
<td>Acrylic Perspex 9 mm</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>020199 1</td>
<td>Acrylic Perspex 10 mm</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>020200 1</td>
<td>Acrylic Perspex 11 mm</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>020201 1</td>
<td>Acrylic Perspex 12 mm</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>020202 1</td>
<td>Acrylic Perspex 13 mm</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>020203 1</td>
<td>Acrylic Perspex 14 mm</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>020204 1</td>
<td>Acrylic Perspex 15 mm</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Click on the ‘Stocktake Records’ button to continue. In this example, you are provided all the details for orders and top ups.

### Stocktake Active Consumables

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

Any user can order consumables through My Dashboard.

- **Step 1: Select the project:**

<table>
<thead>
<tr>
<th>Item ID</th>
<th>Description</th>
<th>Unit</th>
<th>Price per Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>A2518</td>
<td>A2518 100ml</td>
<td>100ml</td>
<td>$30.90</td>
</tr>
<tr>
<td>D2020</td>
<td>D2020 100ml</td>
<td>100ml</td>
<td>$30.90</td>
</tr>
<tr>
<td>916550</td>
<td>916550 100ml</td>
<td>100ml</td>
<td>$30.90</td>
</tr>
<tr>
<td>922260</td>
<td>922260 100ml</td>
<td>100ml</td>
<td>$30.90</td>
</tr>
<tr>
<td>741550</td>
<td>741550 100ml</td>
<td>100ml</td>
<td>$30.90</td>
</tr>
<tr>
<td>747260</td>
<td>747260 100ml</td>
<td>100ml</td>
<td>$30.90</td>
</tr>
</tbody>
</table>

- **Step 2: Enter the order quantity:**

Draft S W10 80 cm

- **Delivery Fee:**

<table>
<thead>
<tr>
<th>Item ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>671950</td>
<td>Thin-walled capillary tubes</td>
</tr>
</tbody>
</table>
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.

### 9.3.13 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 centre 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.
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’s 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 the 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 system sends an alert message to the generic ‘Contact Us Email’ in the system settings.

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. 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 resource and save the booking?

The system treats this booking as a booking for the user.

12. What if I choose the staff time resource and save the booking?

The system saves the booking to this resource in the name of the selected user, and also saves the booking 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 can’t I find the staff time facility in the dropdown list?

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

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

This appendix provides 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 or 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></td>
<td>Incident, other equipment damaged</td>
</tr>
</tbody>
</table>

In the latter situation the whole room would be shut. In this 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. 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 is best done as they add each new piece of equipment to the resource 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 organize them
- Records of all repairs/maintenance and costs, who performed them, what the problem was, etc
- Records of whether works were scheduled or unscheduled
- A place to record:
  - 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 and 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 resource according to the pre-set incident category
• Asset: refers to “any resource” to be registered as an “asset”. So an asset must be a resource, but not vice versa
• Material: refers to any materialized items, be they hard material, software, or an application
• Labour: refers to any work involved
• Resource Assembly: refers to assembly parts or components of a resource

10.2 2018 Requested Changes

Booking Home Page (General and System Administrators)

• Hide Resource Catalogue

Dashboard (General and System Administrators)

• We want to see the following:
  • My Home (Hide Forms, Resource Catalogue, Corea Analytics)
  • My Profile
  • Training Records
  • Resource Status
  • Resource Alerts

Incidents (General)

• Disable Incident section for non-system administrators

Contract (Funding)

• Purchase Date
Appendix B – Modification for IHMRI

• Funding Category (create drop-down list via Register Funding Category)
• Cost Centre Owner (create drop-down list via Register Cost Centre Owner)
• Cost Centre Number (max length 30)
• Amount ($)
• Notes

**Finance Report**

• Create a Funding Report (with total amount calculated for each resource):
  • Resource Group
  • Resource Name
  • Resource Assembly
  • Purchase Date
  • Funding Category (create funding drop down list)
  • Owner
  • Cost Centre Number
  • Amount ($)
  • Notes

**Register Funding Category**

• Create something similar to Incident Category Editor

**Contract Record Desk**

• For Contract (Maintenance) and Contract (Warranty) can we please make sure that the Reminder Date remains ticked when editing.

**Incident Date**

• We want to select the Incident Date instead of it automatically selecting the day it was reported on the Booking System

**Search Resource Profile**

• Add ‘Maintenance Agreement Number’ to the search criteria.
Flow Chart of Process
The following chapters relate directly to the process set out in the flow chart.

10.3 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.

![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

![Register Incident Category]

10.4 How to Report an Incident (System Administrator Only)

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

![Report Incident]

Click on Report Incident to lodge an incident:
### 10.5 How to Respond to an Incident

The system shows the reported incidents on My 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>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>Flash Red Light</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.

10.6 How to Search for an Incident

Multiple searching tools are provided to find incidents: by status, by resource 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.

---

### 10.7 How to Make Scheduled Maintenance & Unscheduled Service Bookings

By default, all unscheduled service bookings can only be made through the incident response process.

Before going 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:

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

• Register Resource Profile:

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

You can set the resource assembly through *Resource Manager.*
Here is an example of the resource assembly chart:

We need to define the term asset: In the system, an asset must be a resource or resource assembly, but a resource or resource assembly does not have to be an asset. Before you are able to register a resource assembly as an asset, you must register its resource as a resource profile first.

Data fields are defined as following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Example Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Date</td>
<td>15.7.10</td>
</tr>
</tbody>
</table>
# Appendix B – Modification for IHMRI

**Original cost of item** $155,000

**Depreciation** 5%pa

**Details of service contracts – cost, and what it covers**  
- **Cost:** $15,000 per year  
- **Covers:** 2 x scheduled maintenance per year, parts for scheduled maintenance, travel time. **Does not cover services for breakdowns**

**Lifespan of item** 7 yrs

**End of Life calculation, that warns on the Dashboard when it’s drawing close (more notice for more expensive items)** 15.7.17

**Asset numbers** 12 588746 48976 (the number will come off a barcode issued by the university)

**Location** Bldg 32.115

**Suppliers & supplier details**  
- **KI Scientific**  
  41564 Smith Street  
  Sydney  
  Ph 6351 6112  
  Fax 4543 1454  
  Contact Peter Jones  
  Email pjones@ki.com.au

**Details of required software**  
- Software is called ‘flowjoe’. Needs to work from Mac with OS10.4 or higher.

**Whether it is networked or not** Yes, data point number A-226

**Extra notes section to record eg computer passwords and any extra information** Password for software is: ihmri446

Data entry is explained as below:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource</td>
<td><strong>Not editable</strong></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 resource</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>Resource Networked</td>
<td>Yes/No</td>
</tr>
<tr>
<td>Software Details</td>
<td>Detailed description of software</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>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar selection</td>
<td>Drop down Calendar selection</td>
<td>Calendar selection</td>
<td>$ = Calculated based on valid until date &lt; current date</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>
</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>
</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>
</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
• Funding

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.

To find the registered consumables, simply type keywords to find them. If keywords are not entered, search for all.

For consumables 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>
</table>

AC LAB SYSTEM 331
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.

10.8 Contract Reminder Alert

The contract reminder alert applies to maintenance and warranty contracts. Upon activating the alert, an email alert will be sent out to the staff (set up through email receivers).

  Go to Email Receiver to set up the proper receivers for the contract expiry alerts.

10.9 Search Contract

Searching contract page is modified to suit IHMRI needs.
10.10 Access to Resource Lifespan

Through Report Manager -> Resource 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 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 resource
- 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

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

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

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

10.12 Booking Report

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

- Summary by resource
- Summary by booking type
- Summary by supervisor
- Itemised report

In this modification, the concept of ‘Report – Hours per Day’ is introduced. To make it work, you need to go to Resource Manager to set this up for each resource. The default is zero.
10.13 Set Up Unit Responsible

Unit Responsible is required to manage each resource group in IHMRI to own the following services.

- Who responds to *Training and Support Requests*
- Who responds to *Incidents*
- Who issues *Training Certificates*

Go to **Staff -> Unit Responsible Manager** to set up.

Go to **Resource Manager**, Unit Responsible is assigned to each resource group.

10.14 Set Up User Theme

User Theme comes with the three choices at this stage would be 'Chronic Conditions and Lifestyle', 'Diagnostics and Therapeutics' and 'Mental Health and the Ageing Brain'.

Go to **System Settings -> User Theme** to set up.
10.15 FAQ

14. 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 Resource Status.

15. 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.

16. 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”.

17. 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.

18. Can we edit the original incident description written by users?

Yes, you can.

19. 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 Resource Status page.

20. 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.

21. 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.

22. Do we have to set up asset to resource before making maintenance and service bookings?

This is not necessary.
23. **Can we search resource profiles by keywords?**
   
   Yes, you can search easily using keywords as illustrated below.

24. **Can we search contracts by keywords?**
   
   Yes, you can.

25. **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.

26. **Can we upload more than more documents per contract?**
   
   Yes.

27. **Can we issue training certificate to the user to record trainer and training date?**
   
   Yes. Go to user profile to edit user certificate.
Appendix C – Modification for IFM

IFM 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 -> 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 for the users who are security officers or technical managers.

For security officer group, 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 the 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 resource 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 Expiring Date: Once you set this to ON, the certificate 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 resource groups. You are able to toggle the booking status view of each resource 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 resource locations.

11.5 Approve Out-of-Hours Bookings on My Attention

On ‘Approve Bookings’ and ‘Approve Out-of-Hours Bookings’, you are able to see the latest user training record and contact users by email if needed.

11.6 Account Owners

Account owners are required by IFM so ACLS can generate invoices either account owners or user’s supervisor.

Go to Account Manager to add the account owner and email. By default, all the existing accounts have no account owner and owner email.
If account owners are not set up, then you won’t be able to run account owner invoices.

### 11.7 Account Owner Invoices

In ACLS, there are two functions to create invoices: Resource Booking Invoicing and Resource Batch Invoicing.

- **Resource Booking Invoicing:**

  You are able to generate single invoices as the function name is stated.

  Supervisor invoicing is the same function as what you are familiar with. The account owner invoicing is the newly implemented.
Resource Batch Invoicing:

You are able to generate batch invoices as the function name is stated. The entire batch invoicing is re-designed to be consistent with the tile design concepts.
You can email selected invoice to supervisor or account owner, or email to all.

### 11.8 High charge bookings

First of all, you need to set up default high charge value to the resource via Resource Manager.

- Set up default high charge amount
You can flush all resources high charge amount to the default value anytime.

- Set up resource high charge amount

<table>
<thead>
<tr>
<th>Booking Resource</th>
<th>Accutom 50-1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certificate details</td>
<td>Go to Training Manager to update certificates</td>
</tr>
<tr>
<td>Trainer details</td>
<td>Go to Training Manager to update trainers</td>
</tr>
<tr>
<td>Charge/HR ($)(UNSW Account)</td>
<td>0.00</td>
</tr>
<tr>
<td>Charge/HR ($)(External Invoice)</td>
<td>0.00</td>
</tr>
<tr>
<td>High Charge Amount ($) (No effect if set to 0)</td>
<td>0.00</td>
</tr>
<tr>
<td>Resource Group</td>
<td>METALLOGRAPHY-ACCUTOM</td>
</tr>
<tr>
<td>Resource Image</td>
<td>![Image]</td>
</tr>
<tr>
<td>Resource Type</td>
<td>Lab Space</td>
</tr>
<tr>
<td>Catalogue Access</td>
<td>Local</td>
</tr>
<tr>
<td>Item Number</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Precision cut-off machine</td>
</tr>
<tr>
<td>Location</td>
<td>na 1.203</td>
</tr>
<tr>
<td>Custodian</td>
<td></td>
</tr>
<tr>
<td>Min Hour per Session</td>
<td>0.25</td>
</tr>
<tr>
<td>Min Booking Unit</td>
<td>15 minutes</td>
</tr>
</tbody>
</table>

System emails to account owner if the charge is higher than the pre-set high charge value in the resource profile.
11.9 Risk Level

Risk level only applies to the unapproved bookings. As normal, you need to click `Dashboard -> Approve Bookings` to approve or decline the unapproved bookings.

Upon opening Approve Booking tile, you see all the unapproved bookings for action. Medium Risk checkbox is added for risk level decision.

Tick the Medium Risk checkbox to mark up the booking as medium risk level booking.

11.10 Display Booking Risk Level

On all the calendars, all the approved bookings are shown the risk level if the risk level is ticked when approving.
11.11 Display Risk Level in Security View

Medium risk is added to the booking details as shown in the following snapshot.

This applies to both summary view and security view. If booking note is available, click on Bookmark icon to open the detail console.
11.12 FAQ

1. How does the “Valid to Expiring 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 to the system.

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

   No. However, if you wish to extend the certificate with a new expiry date, you need to cancel the current certificate, and re-issue it. The system cannot 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 view upon security officer login?

   Upon login, security officer can only access the security view, through computer or mobile.
Appendix D - Modification for CSIRO

12 Appendix D - Modification for CSIRO

This appendix intends to cover the information about charge changes to the standard ACLS for CSIRO.

We have decided that we need the Category Manager module, as mentioned in Appendix A – Modification for ANFF, as we would like to have more than the current 2 default options of Internal or External.

12.1 Step 1: Set up Charge Category

Go to Utilities -> Charge Category Manager, set up the charge category.

12.2 Step 2: Set up Charge Category vs Type of Researcher

Click on Charge Category vs Type of Researcher button on Charge Category Manager page. The purpose of setting this up is to set up the initial charge category upon approving a new user registration.

12.3 Step 3: Set up Charge Category for each resource

Go to Utilities -> Resource Manager. Depending on the number of charge categories, you can set up the charge rate per category against each resource. This charge rate will be used for cost calculation in reports and invoices.

12.4 Step 4: Set up Charge Category vs Resource for each user

Go to User Profile -> User Profile Manager, find the user and edit their profile. The charge category settings are shown in the screenshot below.

To change or set up Charge Category, click on Edit User Charge Category. Then the system shows the charge category vs resource page for selection.

In the above example, if you book SEM - Tescan MIRA/TIMA, then you are charged the category #2 charge rate defined in Resource Manager.
The system tracks the change of user category in day unit. In other words, if you have checked “Category #1” for resource “SEM - Tescan MIRA/TIMA” from 20/7 to 25/7, and checked a new charge category “Category #2” from 26/7 to the future, the booking cost calculation is based on the different rates for the booking times accordingly.

You must set up the charge category per user for all users. If the system cannot locate the charge category for a user, the booking cost to the user is zero.
Appendix E – Modification for OSLO

This appendix intends to cover the information about changes for Oslo University to many aspects of ACLS. In short, they are:

Change to standard version:

- **System settings:**
  - Add microscopy type settings

- **Staff resources:**
  - Add charge category settings

- **Resource manager:**
  - Add charge rate matrix for resource vs charge category
  - Add charge rate change tracking

- **Online registration**
  - Add microscopy type selection
  - Add charge category selection

- **User profile**
  - Add microscopy type selection
  - Add charge category selection

- **Booking calendar**
  - Replace all the tools with ‘Un assisted’, ‘Assisted’ and ‘Service’ booking tool
  - Unassisted booking:
    - Set 13:00 as breakline for the general user, only applies to weekdays
    - Add “Assistance Required” checkbox to the event window
  - Assisted Booking
    - Add “Assistance Required” checkbox to the event window

- **Apply charge rate according to the charge table below**

- **Report manager**
  - Apply charge rate according to the charge table below to booking report and batch report

- **Invoice manager**
  - Apply charge rate according to the charge table below to booking report and batch report

<table>
<thead>
<tr>
<th>Assistance</th>
<th>Department of Biosciences</th>
<th>University Of Oslo</th>
<th>Other Academic</th>
<th>Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
<td>E</td>
</tr>
<tr>
<td>F</td>
<td>G</td>
<td>H</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- The letters stand for different prices.
- Assistance means that the lab staff is doing the work for or is actively helping the user. This will be more expensive, hence a different price. If “assistance required” box is checked, then apply the assistance rate with “+”; if not, apply “-“.
13.1 To Set Up Microscopy Type

Go to System Settings -> Microscopy Type to continue.

13.2 To Set Up Charge Category

Charge Category is required to apply the proper rate to the bookings for reporting and billing.

Go to Utilities -> Charge Category Manager to continue.

13.3 Online Registration and User Profile

Microscopy Type and Charge Category are added to both. In particular, the Charge Category is required to define the charge rate vs resource over time.

The other fields remain unchanged for online registration and user profile.
13.4 Booking Calendar

According to the modification requirements, the booking calendar is re-designed to provide the following 3 booking tools:

- **Unassisted**: available to users and staff, users can choose ‘assistance required’ if needed
- **Assisted**: available to staff only, staff can use this tool to book for users, if ‘assistance required’ is checked, then the booking session is under assistance
- **Service**: same as the standard version

To set the booking event as an assistance session, you must check the box ‘Assistance Required’, so the assistance charge rate applies.

- For general users, 13:00 time breakline is validated to ensure they can only book either before 13:00 or after 13:00. A warning sign shows up if that occurs.
- No booking session can cross 13:00. This rule applies to weekdays only.
### 13.5 To Set Up Charge Rate

Through *Utilities → Resource Manager*, you are able to set up the proper charge rate.

<table>
<thead>
<tr>
<th>User Category</th>
<th>Charge/Hour (W/HR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control: Mandatory training package (2h)</td>
<td>0.00</td>
</tr>
<tr>
<td>Control: Mandatory training package (3h)</td>
<td>750.00</td>
</tr>
<tr>
<td>Hour based</td>
<td>0.00</td>
</tr>
<tr>
<td>Hour based</td>
<td>400.00</td>
</tr>
<tr>
<td>BTV user</td>
<td>0.00</td>
</tr>
<tr>
<td>BTV user</td>
<td>400.00</td>
</tr>
<tr>
<td>BTV user with assistance</td>
<td>0.00</td>
</tr>
<tr>
<td>BTV user with assistance</td>
<td>350.00</td>
</tr>
<tr>
<td>Industry user</td>
<td>0.00</td>
</tr>
<tr>
<td>Industry user</td>
<td>1150.00</td>
</tr>
<tr>
<td>Industry user with assistance</td>
<td>0.00</td>
</tr>
<tr>
<td>Industry user with assistance</td>
<td>1150.00</td>
</tr>
<tr>
<td>Other Academic user</td>
<td>0.00</td>
</tr>
<tr>
<td>Other Academic user</td>
<td>400.00</td>
</tr>
<tr>
<td>Other Academic user with assistance</td>
<td>0.00</td>
</tr>
<tr>
<td>Other Academic user with assistance</td>
<td>850.00</td>
</tr>
<tr>
<td>Platform staff</td>
<td>0.00</td>
</tr>
<tr>
<td>Platform staff</td>
<td>0.00</td>
</tr>
<tr>
<td>Supervisor Basic</td>
<td>0.00</td>
</tr>
<tr>
<td>Supervisor Basic</td>
<td>400.00</td>
</tr>
<tr>
<td>Supervisor Plus</td>
<td>0.00</td>
</tr>
<tr>
<td>Supervisor Plus</td>
<td>0.00</td>
</tr>
<tr>
<td>U/O user</td>
<td>0.00</td>
</tr>
<tr>
<td>U/O user</td>
<td>400.00</td>
</tr>
<tr>
<td>U/O user with assistance</td>
<td>0.00</td>
</tr>
<tr>
<td>U/O user with assistance</td>
<td>850.00</td>
</tr>
</tbody>
</table>

The system shows the change tracking over month. In other words, each change applies per month. For example, if you change the rate on Jan 8, the changes take effect from Jan 1.
Appendix E – Modification for OSLO

Please note that changes are recorded in pairs, +/- or assistance/non-assistance.

13.6 Report

All the reports are compiled using the charge rate that is valid during the month. For example, it is March 2015 now, if you run the report for Jan 2015, the charge rate applied is the one valid in Jan 2015.

In the screenshot below, + means booking hours with assistance, - means booking hours without assistance.

13.7 Invoice

All the invoices are compiled using the charge rate that is valid during the month. For example, it is March 2015 now, if you run the report for Jan 2015, the charge rate applied is the one valid in Jan 2015.

In the screenshot below, + means booking hours with assistance, - means booking hours without assistance.
**Appendix E – Modification for OSLO**

**STUDENT**
February 2019

**Tlf:** 0055110
**FAX:** 0055110
**E-mail:** ac.felpia@oslo.no
**DATE:** March 6, 2015

**DETAILS**
This statement covers the work for you (group) in February 2015.

**Details of work:**

<table>
<thead>
<tr>
<th>Work Hours</th>
<th>Facility</th>
<th>Working Order Time</th>
<th>Actual Completion Time</th>
<th>Payment</th>
<th>Booked Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 Nov 2014</td>
<td>Acro Spinning End</td>
<td>0000/0000 00:00</td>
<td>0000/0000 00:00</td>
<td>Internal Account</td>
<td>0.50</td>
</tr>
<tr>
<td>20 Nov 2014</td>
<td>Acro Spinning End</td>
<td>0000/0000 00:00</td>
<td>0000/0000 00:00</td>
<td>Internal Account</td>
<td>0.50</td>
</tr>
<tr>
<td>20 Nov 2014</td>
<td>Acro Spinning End</td>
<td>0000/0000 00:00</td>
<td>0000/0000 00:00</td>
<td>Internal Account</td>
<td>0.50</td>
</tr>
</tbody>
</table>

**Summary of bookings:**

<table>
<thead>
<tr>
<th>Facility</th>
<th>Work Hours</th>
<th>Account</th>
<th>Rate (per hour)</th>
<th>Amount</th>
<th>Product Hours</th>
<th>Charges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acro Spinning End</td>
<td>20 Nov 2014</td>
<td>Acro-Spinning End</td>
<td>$1.00</td>
<td>$1.00</td>
<td>1.00</td>
<td>$1.00</td>
</tr>
<tr>
<td>Acro Spinning End</td>
<td>20 Nov 2014</td>
<td>Acro-Spinning End</td>
<td>$1.00</td>
<td>$1.00</td>
<td>1.00</td>
<td>$1.00</td>
</tr>
<tr>
<td>Acro Spinning End</td>
<td>20 Nov 2014</td>
<td>Acro-Spinning End</td>
<td>$1.00</td>
<td>$1.00</td>
<td>1.00</td>
<td>$1.00</td>
</tr>
</tbody>
</table>

**Total** | 1.00 | $1.00 | $1.00 |

**Fees**

<table>
<thead>
<tr>
<th>Account</th>
<th>Charges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Account</td>
<td>$1.00</td>
</tr>
</tbody>
</table>

**Summary Fees:** 0055110
14 Appendix F – Modification for CMCA

This appendix intends to cover the information about changes for CMCA, University of Western Australia to ACLS. In short, they are:

14.1 2018 Requested Changes

- CMCA Online registration form: 4 pages to complete the registration form
- Registration pathway:
  - Create pathway
  - Users and staff are able to see the pathway status
  - Upon the completion of pathway, admin staff can approve the registration
- User access expiry date alert and action:
  - When user’s access expiry date is approaching in less than two weeks, the system shows an alert on the booking page to remind the user to update the registration. Upon update, admin staff receives a notification for further action to extend the access expiry date.
  - If user access date is expired, user access to ACLS is disabled.
- Account selection for bookings
  - If the user holds more than one account, the user must choose the proper account from the dropdown list to continue. So add “Please choose the correct account for booking” to the dropdown list.
- Active users only for booking:
  - We want to set the active users for selection to all the booking tools instead of all users to the current ACLS.
- Search active users by bookings:
  - We want to be able to find out the users who booked a resource during the chosen period of time.
- Apply a special multiplexer to the standard charging rate for the off-business time
  - “We’d like to automatically apply a $\frac{1}{4}$ billing multiplier to the hours booked from the hours of 5pm to 9am next day, from the current rate applies to the bookings from 9am to 5pm”
  - “We’d like to automatically apply a $\frac{1}{4}$ billing multiplier to the hours booked, for the following hours:
    - 17.00 Monday until 9.00 Tuesday
    - 17.00 Tuesday until 9.00 Wednesday
    - 17.00 Wednesday until 9.00 Thursday
    - 17.00 Thursday until 9.00 Friday
    - And 17.00 Friday until 9.00 Monday
  - Leaving the full rate at other times, Monday to Friday 9.00 until 17.00
- Build all the reports to display usage hours and charges in terms of business time and off business time

- Flow Chart of User Registration Process:

- The addition to the Registration pathway page, so all existing users can have meetings to register for future courses. So there will be a new user meeting section and a existing user meeting section (in the existing user meeting section all CMCA users can be seen on the pull down sections) See NUM-EUM.jpg

- On the current NUM for the current modules will be changes a mock up is on the NUM.jpg. All pull down and tick boxes we can edit / change.

- Note the 1.1, 1.2 etc. is only to indicate the location on the page and should not be on the form itself.

To stay the same (First section)

Unapproved user
Date of New User meeting
Staff member present (text change)
Appendix F – Modification for CMCA

Training Plan CMCA Courses
- Course Dates. (pull down menu)
- Only the next course date
- One to one training

Technique Group (pull down menu)
- Optical / Confocal
- Cytometry
- XRD
- NMR
- NOTE: We can add/edit this field

Instrument (pull down menu)
- ALL CMCA INSTRUMENTS
- NOTE: We can add/edit this field

Any special arrangements or comments (Single line)

THIS SECTION IS REPEATED 3 TIMES, for different courses.

Training Plan (Electron Microscopy)

Heading: Training Plan for SEM
- Course Dates. (pull down menu)
  - Only the next course date
  - One to one training

Instrument (Pull down menu)
- Zeiss
- Verios
- Tescan
- 2.3 Discipline: (Pull down menu)
- Biosciences
- Physical Sciences
- Geosciences

Required modules (tick box, one or more can be ticked)
- Imaging
- Basic EDS
Appendix F – Modification for CMCA

- Advanced EDS

Any special arrangements or comments (Single line)

Heading: Training Plan for TEM

Course Date. (pull down menu)
- Only the next course date
- one to 1 training

Instrument: (pull down menu)
- 2100
- Titan

Discipline: (pull down menu)
- Biosciences
- Physical Sciences
- Geosciences

Any special arrangements or comments (Single line)

CMCA Swipe Card Access

What area(s) are swipe card access required (tick all that apply) (tick box, one or more can be ticked)
- CMCA@Bayliss
- CMCA@Physics
- CMCA@Perkins
- CMCA@IOMRC

Samples (No changes)

- Has sufficient information been provided on the samples to be studied
  Yes/No
- Date samples are ready
- What preparation (if any) will be used - Main)
  - CMCA-Physics
  - CMCA-Bayliss
  - CMCA-Perkins
  - Sample will be prepared elsewhere
  - NOTE: We can add/edit this field
Appendix F – Modification for CMCA

- Which preparation facilities (if any) will be used –Secondary
  - Physics Chem lab (for SEM prep)
  - Physics Chem lab (for TEM prep)
  - Cryo Prep
  - Vacuum Oven
  - Plasma Cleaner
  - NOTE: We can add/edit this field.

- What additional health and safety related information is required before the project can commence? (Paragraph)

- Additional comments (paragraph)
## Appendix F – Modification for CMCA

### New User Meeting

<table>
<thead>
<tr>
<th>User</th>
<th>Date of New User Meeting</th>
<th>Staff member present</th>
<th>Staff member present</th>
<th>Staff member present</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>12/12/2017</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Training Plan CMCA Courses

<table>
<thead>
<tr>
<th>Course Dates</th>
<th>Technique Group</th>
<th>Instrument</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose CMCA Course dates</td>
<td>Choose CMCA Technique group from list</td>
<td>Choose CMCA Instrument from list</td>
</tr>
</tbody>
</table>

### Training Plan (Electron Microscopy)

#### Training Plan for SEM

<table>
<thead>
<tr>
<th>Course Dates</th>
<th>Instrument</th>
<th>Discipline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose CMCA Course dates</td>
<td>Choose CMCA Instrument from list</td>
<td>Choose Discipline from list</td>
</tr>
</tbody>
</table>

- Required Modules (Tick if applicable)
  - [ ] Imaging
  - [ ] Basic EDS
  - [ ] Advanced EDS

### CMCA Swipe Card Access

What access is required (tick all that apply)
- [ ] CMCA/BSylLs
- [ ] CMCA/EPerkins
- [ ] CMCA/Physics
- [ ] CMCA/HHMMC

### Samples

Has sufficient information been provided on the sample to be studied?
- No

Date the samples will be ready for analysis:
| 12/12/2017 |

Which preparation facilities (if any) will be used – Main?
- Choose CMCA Preparation Facility – Main - from the list

Which preparation facilities (if any) will be used – Secondary?
- Choose CMCA Preparation Facility – Secondary - from the list

What additional health and safety related information is required before the project can commence?

Additional comments:
14.1.1 To Set Up Registration Pathway

Registration pathway is a process of approving the user registration request. By default, the system has the first built-in step “Received registration”. Admin staff can amend and add the registration process steps to suit your labs.

Go to System Settings -> CMCA Registration Pathway.

You are able to define the step number for each step. ACLS shows the step order in the pathway.

Pathway Chart

<table>
<thead>
<tr>
<th>Step 1 (1):</th>
<th>Electronic application submitted and being processed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2 (2):</td>
<td>Academic in charge scheduling the New User Meeting</td>
</tr>
<tr>
<td>Step 3 (3):</td>
<td>Training and access is confirmed through NUM</td>
</tr>
<tr>
<td>Step 4 (4):</td>
<td>Waiting for the signed form to be submitted by the User</td>
</tr>
<tr>
<td>Step 5 (5):</td>
<td>Signed form received</td>
</tr>
<tr>
<td>Step 6 (6):</td>
<td>ACLS activated / re-activated and user notified</td>
</tr>
</tbody>
</table>

To add a new step:

You can have up to 20 steps in the registration pathway.

14.1.2 To Register

According to the requirements, 4 pages of the form are defined and implemented. Users must fill the entire form to register.
Appendix F – Modification for CMCA

Page 1: Registration

Users can save a temporary copy for later use. The system keeps the temporary copy for max 14 days.

Page 2: Project Description and Risk Assessment
### Project Information (Please ensure all applicable fields are filled in)

- **Type of research**: academic staff
- **Expected project completion date**: 04/07/2018
- **Project category**: biomedical science
- **Project title**: 

### Principal Supervisor Details

- **Title**: 
- **Given name**: 
- **Family name**: 
- **Email address**: 

### Risk Assessment for sample/reagents that will be brought into the Centre

- **Sample description**: 
- **Where will the sample be prepared?**: 
- **Is it a C2/C3/C4 laboratory?**: Yes
- **If yes, the Office of Human Technology Transfer (OHrTT) number must be provided**: 
- **Sample form**: Solid
- **Sample concentration** (if applicable): 
- **Are the samples hazardous?**: Yes
- **If yes, provide details**: 
- **Are the samples classified as dangerous goods?**: No
- **If yes, provide details**: 
- **Are the samples registered as part of a CBBM project?**: No
- **If yes, provide details**: 
- **If yes, provide details and registration number**: 
Appendix F – Modification for CMCA

Page 3: Fund Sources and Payment Details

Fund sources (please ensure all applicable fields are filled in)

Are you or do you intend to use another ANMRIF nomenclature?*

If yes, please specify (ANMRIF Notes)*

Please specify all sources of funding*

1. NHMRC Project Grant
2. NHMRC COE
3. NHMRC Development Grant
4. NHMRC Program Grant
5. NHMRC Fellowship
6. Targeted Government Funded Program
7. Trust or Scholarship (general)
8. ARC DP
9. ARC COE
10. ARC LP
11. ARC Special Research Initiative
12. External University Grant (inv. UPA)
13. Industry Sponsored, Please specify the name of the company
14. Australian Postgrad Stipend
15. Self-Funded
16. Multiple Grants
17. Medical Research Institute
18. Cooperative Research Centre
19. Other, Please specify:
20. Funding from a external university

Please specify the name of the company if applicable, 15 or 19.
Appendix F – Modification for CMCA

Payment details (for LVWA users)

<table>
<thead>
<tr>
<th>Option(s)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Cell licensing rate operated by CMCA staff $120 / hour</td>
</tr>
<tr>
<td>1</td>
<td>Industry rate: Non-LVWA user operated $125</td>
</tr>
<tr>
<td>2</td>
<td>Industry rate: LVWA user operated $125</td>
</tr>
<tr>
<td>0</td>
<td>Hourly rate: HRI Bioregistry Facility (user operated) $120</td>
</tr>
<tr>
<td>0</td>
<td>Hourly rate: HRI Bioregistry Facility (including operator rate $120)</td>
</tr>
<tr>
<td>0</td>
<td>DMRC - Non-LVWA User Only</td>
</tr>
<tr>
<td>0</td>
<td>Int Probios rate</td>
</tr>
<tr>
<td>1</td>
<td>Permanent rate for single crystal X-ray diffracton $250</td>
</tr>
<tr>
<td>0</td>
<td>SuperX soaking (100) - Preliminary - LVWA operated only $17</td>
</tr>
<tr>
<td>0</td>
<td>SuperX soaking (100) - Preliminary - CMCA operated only $17</td>
</tr>
<tr>
<td>0</td>
<td>SuperX soaking (100) - Preliminary - user operated $17</td>
</tr>
<tr>
<td>0</td>
<td>SuperX soaking (100) - Preliminary: Block purchase min. 1,000 side scans $2,000</td>
</tr>
<tr>
<td>0</td>
<td>Subscription – Individual: MIR student $1,000</td>
</tr>
<tr>
<td>0</td>
<td>Subscription – Individual: Researcher $2,000</td>
</tr>
<tr>
<td>0</td>
<td>Subscription – Individual: Undergraduate student $1,000</td>
</tr>
<tr>
<td>0</td>
<td>Subscription – Research Group: (100 hrs usage rate) $5,000</td>
</tr>
<tr>
<td>0</td>
<td>Subscription – Research Group: Member</td>
</tr>
</tbody>
</table>

[If no selected: Subscription – Research Group: (100 hrs usage rate) $5,000 or Subscription – Research Group: Member, please enter LVWA Research Group Name* Here]

[Reduction code (RC)***]

[Project guard (PG)***]

Payment details (non-LVWA users)

<table>
<thead>
<tr>
<th>Option(s)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Cell licensing rate operated by CMCA staff $120 / hour</td>
</tr>
<tr>
<td>0</td>
<td>DMRC subscription for probe</td>
</tr>
<tr>
<td>0</td>
<td>Curtin University: hour rate payable directly to Curtin University</td>
</tr>
<tr>
<td>0</td>
<td>Curtin University: subscription – Individual: MIR student $1,000</td>
</tr>
<tr>
<td>0</td>
<td>Curtin University: subscription – Individual: Researcher $1,500</td>
</tr>
<tr>
<td>0</td>
<td>Curtin University: subscription – Individual: Undergraduate student $600</td>
</tr>
<tr>
<td>0</td>
<td>Curtin University: subscription – Research Group: (50 hrs usage rate) $1,000</td>
</tr>
<tr>
<td>0</td>
<td>Curtin University: subscription – Research Group: (100 hrs usage rate) $2,000</td>
</tr>
<tr>
<td>0</td>
<td>Curtin University: subscription – Research Group: (200 hrs usage rate) $4,000</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Individual: MIR student $1,000</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Individual: Researcher $1,500</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Individual: Undergraduate student $600</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Research Group: (50 hrs usage rate) $1,000</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Research Group: (100 hrs usage rate) $2,000</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Research Group: (200 hrs usage rate) $4,000</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Research Group: (300 hrs usage rate) $6,000</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Research Group: (400 hrs usage rate) $8,000</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Research Group: (500 hrs usage rate) $10,000</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Research Group: (600 hrs usage rate) $12,000</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Research Group: (700 hrs usage rate) $14,000</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Research Group: (800 hrs usage rate) $16,000</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Research Group: (900 hrs usage rate) $18,000</td>
</tr>
<tr>
<td>0</td>
<td>BOU / Murdoch University: subscription – Research Group: (1,000 hrs usage rate) $20,000</td>
</tr>
</tbody>
</table>

[If no selected: Subscription – Research Group: (100 hrs usage rate) $5,000 or Subscription – Research Group: Member, please enter LVWA Research Group Name* Here]

[Reduction code (RC)***]

[Project guard (PG)***]

LVWA / Non-LVWA Research Group Name

Invitee to the attention of***

Address***

*required field

Continue

Page 4: Terms & Conditions/Submission
Upon final submission, users can see the final page.

A short printable registration copy is available as a hard record. If a user signature is required, then it can be printed. Also the registration reference number is shown on the screen and an email notice is sent to the user for their records.

The registration reference number can be used to check the registration pathway status.

A copy of the registration notice is sent to the contact us email defined in “Configure System”. If you wish to add more staff to receive the new user registration request email, you can go to “System Settings” -> “Email Receiver” to set them up.

**14.1.3 Approve Registration**

Due to the introduction of registration pathway, to approve the user registration, you need to go to **User Profile -> Registration Pathway Manager**, and select the user to continue.

On the next page, you are able to see the status of each registration pathway. Until all the pathway is closed, you are able to approve the user registration.
Should you need to contact the user, simply click **Contact User**.

Should you need to access user registration form details, go to “Click to access registration form”. For admin, you are able to update the form details; for staff, you can view form only.

### 14.1.4 New User Meeting (NUM)

NUM is accessible via **Registration Pathway Manager**. To set up new meeting, click on **New User Meeting** or **Existing User Meeting**.

New user meeting is for the unapproved users. Existing user meeting is for the registered and active users.
# Appendix F – Modification for CMCA

## New User Meeting

<table>
<thead>
<tr>
<th>Unapproved User</th>
<th>Choose user from the list</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Dates</td>
<td>Choose CMCA Course Date from the list</td>
</tr>
<tr>
<td>Technical Group</td>
<td>Choose CMCA Technical Group from the list</td>
</tr>
<tr>
<td>Instrument</td>
<td>Choose CMCA Instrument from the list</td>
</tr>
</tbody>
</table>

Any special arrangements or comments

<table>
<thead>
<tr>
<th>Course Dates</th>
<th>Choose CMCA Course Date from the list</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Group</td>
<td>Choose CMCA Technical Group from the list</td>
</tr>
<tr>
<td>Instrument</td>
<td>Choose CMCA Instrument from the list</td>
</tr>
</tbody>
</table>

Any special arrangements or comments

<table>
<thead>
<tr>
<th>Course Dates</th>
<th>Choose CMCA Course Date from the list</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Group</td>
<td>Choose CMCA Technical Group from the list</td>
</tr>
<tr>
<td>Instrument</td>
<td>Choose CMCA Instrument from the list</td>
</tr>
</tbody>
</table>

Any special arrangements or comments

## Training Plan (Electron Microscopy)

### Training Plan for SEM

<table>
<thead>
<tr>
<th>Course Dates</th>
<th>Choose CMCA Course Date from the list</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instrument</td>
<td>Choose CMCA Instrument from the list</td>
</tr>
<tr>
<td>Discipline</td>
<td>Choose CMCA Discipline from the list</td>
</tr>
<tr>
<td>Required Modules, Tick All that apply</td>
<td>Basic EDS, Imaging</td>
</tr>
</tbody>
</table>

Any special arrangements or comments

### Training Plan for TEM

<table>
<thead>
<tr>
<th>Course Dates</th>
<th>Choose CMCA Course Date from the list</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instrument</td>
<td>Choose CMCA Instrument from the list</td>
</tr>
<tr>
<td>Discipline</td>
<td>Choose CMCA Discipline from the list</td>
</tr>
</tbody>
</table>

Any special arrangements or comments

## CMCA Swipe Card Access

What area(s) are swipe card access required? (Tick all that apply)

- CMCA@Biology
- CMCA@Pathology
You are able to access each NUM records by click on User Meeting Records button.

The NUM form is required to complete for new and existing user meeting. Each NUM form is required to select the user from the dropdown list.

### 14.1.5 NUM Settings

All the related dropdown list settings can be configured **System Settings**.

Each list set up is the same way, for example, set up CMCA Swipe Cards.
14.1.6 Set Up Business Time and Multiplexer

Go to **Staff -> System Settings -> Configure System -> Business Hour Settings.**

Weekends are considered as off business time.

14.1.7 Usage Reports

According to the proposal (ACLS Change of Order (201606-CMCA) – Final.pdf), booking reports and batch reports are modified to include the calculation for business hours and off business hours separately.

A new reporting platform is implemented so you can easily search (or shortlist), export/print to CSV, EXCEL and PDF. This new technique has been applied to all the report tables.

In addition, as the multiplexer is newly added to ACLS, so if you go back to the previous report in batch report mode, then all the business time and off business time calculations are set to 0 as no data are available unless you re-run the batch reports.

**Snapshot of booking reports by resource:**
Snapshot of batch reports:

14.1.8 User Registration Form

User registration forms are accessible via each user profile. The new meta data form design is implemented for a polished finish.
14.1.9 FAQ

1. How can I set up “Funding Source”?
   This is available to admin only. Go to System Settings -> Funding Sources.

2. How can I set up “Special Requirements”?
   This is available to admin only. Go to System Settings -> Special Requirements.

3. How can I set up “CMCA Facilities”?  
   This is available to admin only. Go to System Settings -> CMCA Facilities.

4. How can I set up “CMCA Labs”?
   This is available to admin only. Go to System Settings -> CMCA Labs.

5. How can I set up “UWA Payment Option”?  
   This is available to admin only. Go to System Settings -> UWA Payment Option.
6. How can I set up “Non-UWA Payment Option”?

This is available to admin only. Go to System Settings -> Non-UWA Payment Option.

7. Why can’t I approve the registration?

The pathway needs to be closed before you can give an approval.

8. Upon approval, can the user access the form?

Yes. He can go to User Profile Manger to access his profile, and also his registration form. However, he cannot change the form details.

14.2 2020 Requested Changes

- Each instrument will now be on a tier system 1, 2 or 3 and depending on what tier it is. Instruments can only be on one tier. The amount to be charged will be different for each tier.

- Users will be able to pre-purchase block of hours for instruments for each tier separately i.e. They would need to “pre-purchase a block of hours” for Tier 1 instruments, if you then want to use a Tier 2 instrument, you would need to either purchase a “pre-purchase a block of hours” for Tier 2, or do hourly rates, if you will be using < 50hrs…..or any of the possible combinations. So any user can have multiple hours and multiple tier subscriptions.

- There will be different amounts for UWA and external rates.

- When there is 10 hours left the user and admin will be notified by email

- When users are booking an instrument they will be able to see how many hours they have left on their subscription for each tier.

- We won't be using group subscriptions any longer.

- There will be no difference between in-hours and out of hours rates.

- We can determine and change instruments tiers, rates and hours per block
Working principles:

- Instruments are grouped into Tiers depending on their complexity and operating costs.
- Options: (1) pay in arrears by the hour, or (2) pre-pay for a block of hours to get a discount.
- The larger the block you buy, the more the discount.
- Block hours can be used on any instrument within that Tier.
- Block hours must be used by a single researcher (no shared blocks).
- Blocks must be used within 12 months of purchase (to prevent large blocks being purchased in Year 1 of a multi-year project)
- You cannot upgrade from one block size to another when you run out of hours (you must buy a new block of hours)

UWA internal rates:

<table>
<thead>
<tr>
<th>Hours</th>
<th>Tier 1</th>
<th>Tier 2</th>
<th>Tier 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Instrument A</td>
<td>Instrument D</td>
<td>Instrument H</td>
</tr>
<tr>
<td></td>
<td>Instrument B</td>
<td>Instrument F</td>
<td>Instrument I</td>
</tr>
<tr>
<td>1</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
</tr>
<tr>
<td>50</td>
<td>$xx</td>
<td>$xx</td>
<td>$xx</td>
</tr>
<tr>
<td>100</td>
<td>$xxx</td>
<td>$xxx</td>
<td>$xxx</td>
</tr>
<tr>
<td>200</td>
<td>$xxxx</td>
<td>$xxxx</td>
<td>$xxxx</td>
</tr>
<tr>
<td>400</td>
<td>$xxxxxx</td>
<td>$xxxxx</td>
<td>Not available</td>
</tr>
</tbody>
</table>

External rates:

- Standard 3:1 multiplier is used to reflect UWA’s 2/3 contribution to CMCA operating costs.

<table>
<thead>
<tr>
<th>Hours</th>
<th>Tier 1</th>
<th>Tier 2</th>
<th>Tier 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Instrument A</td>
<td>Instrument D</td>
<td>Instrument H</td>
</tr>
<tr>
<td></td>
<td>Instrument B</td>
<td>Instrument F</td>
<td>Instrument I</td>
</tr>
<tr>
<td>1</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
</tr>
<tr>
<td>50</td>
<td>$xx</td>
<td>$xx</td>
<td>$xx</td>
</tr>
<tr>
<td>100</td>
<td>$xxx</td>
<td>$xxx</td>
<td>$xxx</td>
</tr>
<tr>
<td>200</td>
<td>$xxxx</td>
<td>$xxxx</td>
<td>$xxxx</td>
</tr>
<tr>
<td>400</td>
<td>$xxxxxx</td>
<td>$xxxxx</td>
<td>Not available</td>
</tr>
</tbody>
</table>

Flow charts:
14.2.1 Set up tiers

Go to Staff tab -> Utility -> Charge Category Manager, set up multiple tiers.
14.2.2  Set up resource tier and rates

Go to **Resource Manager -> Charge Rates** to set up rates. Each resource is entitled to one tier only at any time.

Selected tier and rates are shown in the resource list table.
14.2.3 Purchase hours

Go to User Profile -> User Tier Manager to update the purchased hours by the user. In the following example, user “Aati” purchased the hours for various tiers.

Select tier and hour to purchase the hours and the current balance. The purchased records are logged for reference. The logs also include the usage hour by bookings.

14.2.4 Expiry date of the purchase:

The expiry date of the purchase is set to one year. If users top up the purchase, the expiry date would be updated accordingly.
14.2.5 Charge by hour or by tier:

By default, ACLS runs charge by hour to all the users, by doing so, users can continue making bookings as usual. Once charge by tier is switched on for the user, the user must have the balance hours in the purchased tiers.

14.2.6 Charge by internal rate or external rate:

By default, ACLS enables the internal rate to all the users. Admin is at position to enable the rate selection for resource vs user.
14.2.7 Balance logs for the purchased tiers:

Full log snapshot.

At this page, you are able to define the booking charges by hour or by tier, apply either internal rate or external rate. By default, settings go to by hour and internal rate so this won’t stop users to make bookings even if they haven’t purchased any hours.

14.2.8 Cancel the purchased hours:
Admin could cancel the purchased hours anytime, however, the balance hours will stay at Zero hours if the cancelled hours are more than balanced hours.

In purchased logs, the cancelled purchased hours are marked at minus.
14.2.9 Alternative ways to check balance and logs

Users are able to check the purchased hours balance and logs via My Profile. Staff can user’s balance and logs at user profile page.

14.2.10 Booking with tiers – operation calendar

While making the bookings, booking lightbox window indicates the tier and balance as shown here.
The booking hours are deducted from the balance each time, and recovered to balance if the booking is cancelled.

Resource tier is displayed on the calendar page for information.

14.2.11 Booking with tiers – user and training calendar

Once the tier is enabled to the user, staff could book for the user and also make training bookings for the user, ACLS deducts the balance from the purchased automatically.

14.2.12 Booking with tiers – timeline calendar
For timeline calendar, the tier and purchased hour balance is dynamically displayed for all resources on the calendar, that is different from the single resource operation calendar. No bookings can be accepted if the balance is zero, or less than the booking hours.

14.2.13 Booking cancellation

Once the tier is enabled to the user, the cancelled booking hours are restored to the balance automatically.

14.2.14 Training Bookings

Training booking calendar will not process with the user purchased hours and tiers.

14.2.15 Retrospective Bookings

Go to Data logbook manager to edit the retrospective bookings made in the past. The purchased hours are handled accordingly.

14.2.16 Batch report
Appendix F – Modification for CMCA

Batch reports are run with the automated calculation for the bookings charge by hour and charge by tier. The tiers and rates are included in the reports.

<table>
<thead>
<tr>
<th>Charge Category</th>
<th>Charge Rate ($)</th>
<th>Balance Hours</th>
<th>Booked Hours</th>
<th>Charges ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>tier 1: 50 hours (internal)</td>
<td>4.00</td>
<td>3.00</td>
<td>3.00</td>
<td>32.00</td>
</tr>
<tr>
<td>tier 1: 50 hours (internal)</td>
<td>3.00</td>
<td>5.00</td>
<td>5.00</td>
<td>15.00</td>
</tr>
</tbody>
</table>

14.2.17 Registration page

The following changes are made upon the request. The relevant changes also apply to the registration forms in user pathway manager and user profile manager.

- **On Page 1 Remove totally**

  This will remove the default payment option of $275 for all new users

- **On Page 3**

  Change the text to Payment details (internal)
Appendix F – Modification for CMCA

- Also on Page 3

Payment details (non-UWA and WA Research Partner users; incl. Murdoch, ECU, Curtin and Notre Dame)

Change text to Payment details (associate)
15 Appendix G – Modification for UTS

This appendix intends to cover the information about changes for University of Technology Sydney to ACLS.

15.1 User Profile Manager

Sorting after search is arranged by alphabetic order of user name instead of user title.

15.2 Customised Resource Fields (Item 3)

A new technique is used to add or remove the new fields for resources by yourself.

*Step 1: Add new customised fields*

Go to Resource Manager, click on Customised Resource Fields to add new fields.

For new fields, you need to enter field name and length of field (max number of characters). Please use letter and digit for field name only.
Upon creating the new fields, you can delete them anytime if they are not in use for any bookings.

**Step 2: Add customised fields to Resource**

You need to confirm if you want to set up new customized fields to any resources for its booking form or for its report respectively. If you don’t tick the relevant boxes, then the new customised fields won’t be effect to the resources.

This is all you need to do for adding customised fields.

**Step3: Change the customised field order on popup booking window**

You are able to change the customised fields order on the form. Click on “Set Field Order on Booking Window” button to make the changes.
15.3 Customised Resource Fields on Booking Form (Item 3)

The customised fields will show up on the form depending the resource settings. Please note that all the customised fields are compulsory entry. Without the data entry, the bookings won’t be accepted.

15.4 Customised Resource Fields on Report (Item 4)

Go to Report Manager, a new report tile is added for the resources which have the customised fields enabled. By doing so, the standard reports remain unchanged.

ACLS shortlists the resource groups (that are enabled with the customized fields) for selection.
Appendix G – Modification for UTS

Customised Booking Report

Select Resource Groups

- [ ] LS DIVING
- [ ] TRAILERS

The monthly report example is shown here. You can export to EXCEL anytime.

Please note that vehicle charge capping is not implemented. You can export to excel for the further data process.

Reports by any periods are available for the customised field resources and resource groups.
16 Appendix H – ACLS Python Tracker

ACLS Python Tracker is a cross-platform software desktop app written in Python which working with ACLS web server to provide a web-based desktop app. The tracker is to record user’s usage of the instruments, to restrict instrument access, to alert any OHS related issues in lab to the lab staff through the email, to show the next booking on the current day booking calendar, to show trainer contacts, to provide QR code for mobile device to scan and check lab resources, and also poster feature which is useful for today’s COVID-19 outbreak.

16.1 Working Mechanism of Tracker with ACLS Server

Through the tracker, you can implement a secured access to instrument or equipment by “No Login, No Operation” policy.

Before user can operate the instrument or equipment, he needs to login through the tracker. The tracker checks if user has a valid account, if user has the valid certificate to operate the equipment by himself or require the supervision of the staff member before permitting. During the period of operation or experiment, user can record the experimental notes, see the next booking to better manager his time of operation, and receive the notification sent by staff.

16.2 Tracker Operation

- Login process

Upon executing the tracker program, home page shows up as illustrated below. Home page indicates the following information:

  - Reload tracker: click Reload tracker button to refresh the home login page if you encounter any issues
Appendix H – ACLS Python Tracker

- COVID-19 Poster: this is the default setting in ACLS resource manager. It can be customised by lab to set up different posters
- QR code: use mobile phone to scan QR code and access to resource dashboard
- Trainer: show the trainer contacts
- About: app name and version
- Lab name: ACLS Demo in the snapshot
- Resource name: 3D camera in the snapshot
- Last login: show last login user name, school or organisation name and login day timestamp

Enter User ID and Password to sign in.
Depending on the tracker settings in ACLS resource manager, you might need to select account or project to continue.
• Upon accepting the login, Tracker stays at the top corner of the right-hand side of the screen. Tracker shows the escaped time at the tracking app bar.

• Logout timer (optional)

A logout timer can be activated to logout the tracker automatically when timer runs out of the pre-set hours. It is featured to give the option control to the labs where instrument or equipment operation may need to end at midnight without the human interference.
- Select the desired hours, and click ‘Start Timer’ to begin the countdown. Tracker logs out user automatically when countdown ends.
To stop timer, simply click on ‘Stop Timer’.

- Lock screen (optional)

Lock-screen feature is available as an option. The lock screen is useful for staff and users to lock screen while they are away for lunch break or any other short break. Staff can unlock screen anytime no matter whoever login.
Click Lock Screen to get the screen locked. The entire screen becomes semi-transparent in lock-screen mode.

- Record Notes
  You can record and submit notes during an experiment by clicking the ‘Note’ button. Enter your experiment notes in the textbox provided, and click ‘Submit’ to save the notes.

The user can make simple notes by clicking the ‘Submit Notes’ button. Once the submit button is clicked the note will be submitted to the server, saved and available in ACLS web tracker notes.
• Logging Out

Once you are finished using the instrument, click the ‘Logout’ button to terminate the session.

16.3 Tracker Configuration in ACLS Web Portal

This is for lab admin or system administrator to set up. Login to ACLS, go to Resource Manager to edit the resource property.

The obsolete Java tracker is still on the page for information. The new tracker is configured with the Python tracker page. Here is the explanation of the configuration parameters.
• Resource: instrument or equipment name
• Host ID: it is auto-generated by system used for tracker connection, you can reset the ID if needed. However, if the tracker is already connected, ID reset will make the tracker disconnected.
• ID Type: fixed and not changeable
• Block hotkeys: block all the hotkey combination to stop users from bypassing the tracker login. However, this is only effective if the tracker runs on pc admin account on the instrument or equipment Windows pc.
• Block task manager: tick to block task manager on Windows pc when running Tracker on pc admin account.
• Enable account/project selection: tick to enable account/project selection if you simply use tracker to record instrument/equipment access, or/and safeguard the access.
• Enable locking-screen: tick to enable locking screen feature.
• Enable auto-logout: tick to enable auto-logout. This is different from the timer feature. Timer is controllable on site by staff and users. If auto-logout is turned on, tracker logout upon auto-logout timer countdown is over.

![Enable Auto-Logout](image)

- Enable Full-Screen Mode: This option is enabled by default. If it is ticked, the tracker will be full screen on the login page and the user cannot bypass it. If it is unticked, the user can freely bypass the tracker without logging in. You should only untick this if you plan on disabling the tracker temporarily.
- Allow connection: If you don’t tick this checkbox, tracker connection would be declined.
- Notes: for admin use

Since the tracker is web based, a web URL is available for demo purpose, or used for the other devices such as tablets. Please contact us for the further discussion if you want to run the tracker for the non-computerised equipment or tools.
The tracker adds back the missing logout when the next user login. However, this might cause the incorrect usage time. For example, user A login at 12pm, then reboot pc when leaving without logout at 1pm. User B login at 3pm, tracker automatically adds the logout for user A at 3pm instead of 2pm.

Connection logs are available for cross-check for the situation that users might reboot pc after usage and system logs the longer time session than the actual usage.

16.4 ACLS Tracker Status

You are able to check tracker status including installation status, connection status and IP address of the connected equipment/devices and tracker version.

<table>
<thead>
<tr>
<th>Resource</th>
<th>IP Address</th>
<th>Tracker Installation</th>
<th>Tracker Connection</th>
<th>Tracker Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avizo 1 (no change)</td>
<td>129.94.164.57</td>
<td>Installed</td>
<td>Connected</td>
<td>0.7</td>
</tr>
<tr>
<td>Avizo 2 (no change)</td>
<td>129.94.164.77</td>
<td>Installed</td>
<td>Connected</td>
<td>0.7</td>
</tr>
<tr>
<td>EPMA 8500</td>
<td>129.94.164.3</td>
<td>Installed</td>
<td>Connected</td>
<td>0.7</td>
</tr>
<tr>
<td>FIB Avoga</td>
<td>129.94.164.155</td>
<td>Installed</td>
<td>Connected</td>
<td>0.7</td>
</tr>
<tr>
<td>FIB Avoga - Oxford</td>
<td>129.94.165.77</td>
<td>Installed</td>
<td>Connected</td>
<td>0.7</td>
</tr>
<tr>
<td>FIB NanoLab</td>
<td>129.94.165.64</td>
<td>Installed</td>
<td>Connected</td>
<td>0.7</td>
</tr>
<tr>
<td>Leica LRF-Out</td>
<td>129.94.165.181</td>
<td>Installed</td>
<td>Connected</td>
<td>0.7</td>
</tr>
</tbody>
</table>

16.5 ACLS Poster

You are able to change poster menu and poster image at tracker status page.
16.6 ACLS Tracker Server

ACLS tracker server requires the special configuration with Abyss Web Server X2. ACLS tracker is web based and https connection on the separate port. Please contact ACLS team for assistance.

16.7 Automatically setting up user folders with ACLS Tracker

ACLS Tracker can automatically create folders for each user that logs onto the lab computer. The user can store their files in the folder designated for them.

To enable folder creation:

- Log into ACLS
- Navigate to Staff, then System Settings, then “User Data Folder Setting (Tracker)” in the bottom right corner
- Tick “Create user folder” and press save.
- After these steps, you will need to set up a default directory for the user folders to reside in.

- Log into ACLS
- Navigate to Staff, then Utilities -> Resources, then “Resource Tracker Home Drive” at the bottom
A list of resources will be displayed. For each resource, you must input a directory that will contain all the user folders. This directory will be created on the resource computer. The director can be local folders or on networked drives.

For example, to have all the user folders placed into the data drive, input “D:\”.

System admin will need to select a naming format for the user folder on System Settings -> Configure System -> User Folder Setting (Tracker). The green button on the right.
There are three options available:

- “User name” will create folders based on the user’s first and last name
- “Login name” will create folders based on the user’s login e.g their zid
- “Alias” will create folders based on their provided alias, if it is registered in ACLS.

Press Save to accept the changes.

After these steps, ACLS Tracker will automatically create user folders for users to store their data in.

16.8 ACLS Sensor: keeping track of user folders

If automatic folder creation is enabled (see previous section), then the ACLS Sensor feature can be enabled in order to keep track of user folders. The folders are regularly scanned by ACLS Sensor to keep track of how large they are. This information is uploaded to the ACLS website, allowing you to keep track of disk usage on each lab computer.

To enable ACLS Sensor:

- Log into ACLS
- Navigate to Staff, then Utilities -> Resources, then “Resource Tracker Home Drive” at the bottom
For each resource that you want this feature enabled on, tick “Scan user data folder”

Press Accept

ACLS Sensor scans once every 24 hours. The scan takes place overnight.

To view scan results, press “Scan Home Drive” on the Resource Tracker Home Drive page.

This will take you to a page showing:

- User folders
- The size of each user folder
- The number of files in each user folders
- Scan time
- Last 30 days scan logs: By clicking this button, you will see a list of all scans in the last 30 days.
16.9 ACLS Tracker Installation: Windows XP/7/8/10

ACLS tracker can be downloaded with the dedicated download link provided by ACLS team. Please contact ACLS team if you want to try out.

Upon download, unzip the package, Copy ACLSTracker to System Drive C. The new python tracker does not require installation, it simply double click and run.
Create a shortcut to the desktop

Set up ACLS tracker as the startup program app.

- Press START + R to open the Windows Run window.
- Type in “shell:startup” and press OK.
- Copy the desktop shortcut and paste it in this folder.

This will make the computer run ACLS Tracker automatically every time it turns on.

- For the first time run, tracker brings up the resource selection page, simply select and save the selection, and close the tracker. If the resource is not listed, you need to go to
ACLS web portal to check the resource tracker settings as described in the Tracker Configuration chapter.

- Tracker is ready to run.

16.10 Disable Task Manager for Windows 7 and Windows 10

The tracker needs administrator rights to disable the task manager on Windows 7 and Windows 10. Instead, you can manually disable it by following these instructions.

- Press WINDOWS key and R (WIN+R) to open the Run window.
- Type in regedit.exe and press OK.
- Click and expand the folder named ‘HKEY_CURRENT_USER’.
- Click and expand the folder named ‘Software’.
- Click and expand the folder named ‘Microsoft’.
- Click and expand the folder named ‘Windows’.
- Click and expand the folder named ‘CurrentVersion’.
- Click and expand the folder named ‘Policies’.
- Click and expand the folder named ‘System’.
- On the right panel, double click ‘DisableTaskMgr’ and change the value data from 0 to 1. Press OK.
NOTE: If there is no ‘DisableTaskMgr’ in the right panel, then follow these steps:

- Right click an empty space in the right panel.
- Select New > DWORD.
- Give it the name DisableTaskMgr.

To re-enable task manager, follow the above steps but in step 10, change the value data from 1 to 0 instead.

16.11 ACLS Tracker for Linux

ACLS Tracker is available to run on Linux platforms such as Ubuntu and CentOS. Please contact the ACLS team if you would like to inquire about specific Linux platforms.

The Linux tracker supports the main ACLS Tracker functionality of logging in and tracking login time.

The Linux Tracker does not support the following advanced features:

- Automatic network drive mounting
- Hotkey blocking
- Automated folder creation and ACLS Sensor functionality

**ACLS Tracker Installation: CentOS 7:**

ACLS tracker can be downloaded with the dedicated download link provided by ACLS team. Please contact the ACLS team for a download link at acls.analytical@unsw.edu.au

- Place the application folder in the home directory (/home/[user])
- Open the terminal
- This step will add a desktop launcher for ACLS Tracker. Type and run “sudo nano /home/[user]/Desktop/ACLSTracker.desktop”, substituting [user] with the user of your account.
- In the text editor that appears, type in the following bolded block. Substitute [user] with the user of your account. When you finish, save the file by pressing CTRL+O and then enter. Then exit by typing CTRL+X.

```
[Desktop Entry]
Type=Application
Name=ACLS Tracker
Icon=/home/[user]/ACLSTracker-0.8.3-CentOS7/icon.png
Exec=/home/[user]/ACLSTracker-0.8.3-CentOS7/ACLSTracker
```
- Run the desktop launcher at least once, and select Trust so that the launcher will be usable. If the application fails to launch, see the troubleshooting section.
- This step will make ACLS Tracker launch automatically on login, so it can be skipped if it is not required.
  Type and run "sudo nano /etc/xdg/autostart/ACLSTracker.desktop".
- In the text editor that appears, type in the following bolded block. Substitute [user] with the user of your account. When you finish, save the file by pressing CTRL+O and then enter. Then exit by typing CTRL+X.

```
[Desktop Entry]
Type=Application
Name=ACLS Tracker
Icon=/home/[user]/ACLSTracker-0.8.3-CentOS7/icon.png
Exec=/home/[user]/ACLSTracker-0.8.3-CentOS7/ACLSTracker
X-GNOME-Autostart-enabled=true
```

Troubleshooting (Linux):

Confirm the tracker is compatible with the operating system by manually running it. This can be done by opening a terminal and running "/home/[user]/ACLSTracker-0.8.3-CentOS7/ACLSTracker".

If the tracker is able to run manually, then ensure the [Desktop Entry] files are formatted correctly.

If the tracker does not run manually, then the Linux system may not have the correct package prerequisites. These prerequisites are met by most Linux distributions, but some systems may not meet requirements.

One required package is libXScrnSaver. This is a small utility package with few requirements and it comes preinstalled on most Linux systems, so it should not cause any disruption to existing systems. It can be installed through a package manager e.g. On CentOS, type and run "sudo yum install –y libXScrnSaver".

16.12 Troubleshooting

- Tracker can’t connect to the ACLS tracker server, why?
- Answer:

  There are a number of causes for that as followings:
  - Loss of network
  - Tracker server down
  - Tracker server reject tracker request due to the wrong Host ID setting in tracker configuration file
  - Firewall of network
To establish a dynamic network data drive connection, you need to set up a Data Server to store and share experiment data with users. A single Windows share folder set up is sufficient on the data server. When a user logs in, the tracker communicates with the ACLS server to obtain full authentication information to make the network data connection; and when they logout, it disconnects the network drive.

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

- **Process of network drive connection:**
  - Tracker login
  - Tracker requests network drive settings
  - Tracker 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 Tracker renames the map drive using the name defined in the settings in the ACLS system
  - Tracker logout
  - Tracker 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, abdefg, 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: abdefg

- **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 your logon to ACLS web interface:

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

  ![DataStorageCtrl](image)

- **System Settings -> Configure Data Links**:

  Net Drive Settings: You need to define the following parameters for the console to connect to the network drive as follows:

  ![Links & Directories](image)

  - 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 Resource: this is optional, you can set up an individual folder connection for each individual equipment or resource listed in Resource FTP Access Directory.

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

  Continuing with Case #2, go to Resource FTP Access Directory Settings to set up individual resource folder connection. The individual resource 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 resource folder to make future data sharing and archiving clear and easy, such as \129.94.150.15\images\afm.

  Here is an example of this setup:
ACLS takes “Physical Directory” setting and keeps “afm” for example to conjunct with \129.94.150.15\emunit set out in ‘Net Drive Settings’.

- 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.
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 for 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 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:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ActiveDirectoryDomainName</td>
<td>ad.unsw.edu.au</td>
</tr>
<tr>
<td>LDAPEnable</td>
<td>(Please do the LDAP connection test before switching on LDAP!)</td>
</tr>
<tr>
<td>LDAPLoginPrefix</td>
<td>adunsw</td>
</tr>
</tbody>
</table>

- Active Directory Domain Name: the domain name for LDAP server, or IP address
- LDAP Enable: check the box to turn on LDAP in ACLS
Appendix J – About LDAP Implementation

- LDAP Login Prefix: depends on your local LDAP configuration, for example, some may need a prefix to form the login format as adunsw\z0000000. So your entry is adunsw in this example

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”.

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.

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:

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 and any users who have the email address xxx@unsw.edu.au are subject to this lock up. In other words, they must access ACLS through the UNSW ID system.
SSI aims at achieving a single access point to the trusted ACLS nodes. SSI is useful for multiple ACLS nodes access at university or organization level to replace multiple individual ACLS access. The diagram below demonstrates the concepts of SSI:

SSI supports the following authentications:

- ACLS local authentication
- LDAP authentication
- AAF authentication

AAF stands for Australian Access Federation which provides a single access authentication process for all Australian universities and government bodies. The advantage of AAF is that users can access ACLS with its own organization Uni-Key and Uni-Pass as long as they are registered in ACLS.

ACLS and AAF working mechanism is illustrated here.

The institutes/units/centres/labs which need to provide multiple-universities service can benefit from the AAF integration, no additional costs to implement ACLS and AAF integration as long as you are ACLS customers.
19.1 SSI Prerequisites

The following steps are recommended to set up SSI:

- Install and configure 64 bits server (VM or physical) to host SSI on Windows OS 2012
- Install IIS
- Install PHP engine to IIS
- Install PostgreSQL ODBC driver
- Configure Windows ODBC connection to ACLS SQL server

19.2 Deploy SSI

As SSI is written and run on PHP scripts, we provide the service to customize the scripts to meet your needs. Please contact us for assistance.
19.3 SSI Working Examples

Access Nodes:

- Biomedical Imaging Facility
- Biomedical Mass Spectrometry Facility
- Biological Resources Imaging Laboratory
- Electron Microscope Unit
- Flow Cytometry Core Facility
- Nuclear Magnetic Resonance Facility
- Spectroscopy Laboratory
- Solid State & Elemental Analysis Unit
- Biological Resources Centre
- Molecular Surface Interaction Network Laboratory
19.4 Enable SSI for ACLS Node

It is easy to configure ACLS node for SSI deployment. Go to Configure System page and set up the following parameters **Access Portal URL**.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
</table>

Next, you check the box to the parameter **Enable Single Sign In**.

**EnableSingleSignIn**

Upon enabling SSI, the ACLS own login page is switched off as users must sign-in via SSI.

19.5 Catalogue Resources

In the previous chapters, 4 access controls are described to manage the resource catalogue access.

- Local
- Organisation
- Universe
- Disable
19.6 Organisation Charts

Organisation charts are available in SSI as snapshots here.
Appendix L – Central Finance Integration

This feature provides account or general ledger code validation against the organization central finance records. The major drive for this implementation is to reduce the account code errors in ACLS so to reduce the central finance journal errors.

Here are the steps and details to run the weekly central finance record updates and the ACLS validation change process at UNSW.

- **UNSW Finance**

UNSW finance sends in the finance account records in excel to the designated admin staff once a week as a scheduled task configured in PeopleSoft. The point of contact at finance is Melissa Yau, her email is m.yau@unsw.edu.au.

- **Convert EXCEL sheets to CSV format**

Lab admin opens the sent-in finance records sheet in MS Excel and save it as CSV (MS-CSV) format, the file name remains unchanged.

- **Upload and Publish**

Login to ACLS SSI or ACLS Account Manager to upload the finance record csv file and publish to ACLS account book.
Appendix L – Central Finance Integration

Go to Account Manager, open UNSW Finance Account to access the stored finance account details. The loading of the entire finance records might take a minute, there are over 30,000 active finance ledge codes.

Click on Build Account Correction Table to continue, system auto-picks the suspicious accounts for editing or updating. If there are no matching records found in the finance records, then you edit the account. If there is close-call matching results, you can update the current account name with the correct account name as indicated in the table.

It is admin staff call to edit, update or leave as it is. System checks any new account creation against organization finance account records to minimize the unwanted or human errors so to reduce finance system journal processing loads for using the unidentified or expired accounts.
Appendix L – Central Finance Integration

Lab admin expects to run the account correction once week against the central finance records.

- **User Registration**

If you enabled account entry for user registration form, system does the account validation in the registration form before even submitting the form. By doing so, that really free lab admin from the future account validation workload.

System is able to prompt the user for the similar account for the minor errors.
• Weekly Exception Alert

System runs weekly exception checks on each Sunday morning, and send the account exception alerts to the lab admin for the further actions.

Should you wish to implement this feature for your ACLS, please contact us for assistance.
Appendix M – WHS Document Manager (UNSW Medicine)

WHS document administrative tool is developed for UNSW medicine. This feature could be available to all in the second half of 2020. It has a great user interface to create folders, upload draft, approve drafts with two level controls, maintain user declaration records, and more. The detailed guide for WHS will be available when the feature is available for ACLS community.

Author, level 1 approver and level 2 approver, and administrator is configured in ACLS
Appendix M – WHS Document Manager (UNSW Medicine)

1. Set up WHS folders
2. Upload document as draft
3. Document sent to level 1 for approval. Level 1 approver is set up in SOMS ACLS
   - Upload revision to user inbox, user uploads new draft
     - Approved by level 1?
       - No
         - Upload revision to user inbox, user uploads new draft
       - Yes
         - Document sent to approver 2 for approval
           - Approved by level 2?
             - No
               - Upload revision to user inbox, user uploads new draft
             - Yes
               - Draft is published
                 - Searchable by all users

AC LAB SYSTEM 426
Snapshots: documents, view and upload, approve, edit folders and rejected documents.
To declare: click on the file name to declare for acceptance.
The file is marked as declared to the user who declares.