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Quick Startup Guide

Requesting Lab and Instrument Access

Once logged in navigate to the My Profile tab (Path: My HomePage > My Profile)

Select the User Wizard button

The page will be redirected to a wizard to help with the registration process.

a. Click on the start button to go through the registration process.
b. Access to your lab can be requested by clicking on “Request Access.”

a. To Select access to the facilities click “Next.”
   i. If a facility access form is provided, fill it out during the access request process.
   ii. The facility admin will approve or reject your access request.
b. Request access to applicable instruments within a facility.
   
   iii. Fill out instrument access request form if applicable.
   
   iv. Approval may be automatic depending on the facility.
Entering a PTA

To enter a PTA Navigate to the Instrument page.

1. Select any appointment block. Make sure you can select the correct lab from the Lab drop down menu. If there are no PTA codes in the Account Code drop select “Don’t see your Account code?”
2. The **Add Account Code** window will appear allowing you to enter a PTA code. Enter in the PTA in the **Enter the Account Code** field. If there is a name of the code it can be entered in the name field.

![Add Account Code](image)

3. Once saved the PTA code will be found in the Account Code drop down box.

### Instruments

The instruments tab displays all the instruments listed in a facility.

![Instruments](image)

1. View the description and select options of an instrument by hovering over the image.
   - To mark an instrument “Favorite,” click the star. Selecting this will display the instrument under “**My Favorite Instruments**” on the user HomePage.
   - Report an issue to the admin by clicking “Report an Issue.” Fill in a brief description and a ticket will be created for the admin.
   - Request access to the instrument by clicking “Request Access” next to permission status. Status will show as “Allowed” when the access request has been accepted.
   - View any instrument messages by clicking “Message from the Instrument.
   - Click “Full Description” to view more details.
2. Click a timeslot on the calendar to reserve the instrument.
   a. In the calendar, select the start time. For example, to use the instrument between 9:00 am and 10:30 am, click on the box below (9:00 am). A page loads which to select an end time and session type.
b. To make the reservation, it is mandatory to select a PTA code from account code dropdown list.
3. Waitlist appointments can be created by selecting the timeslot that another user has reserved. Click the tab “Add to Waitlist” and there will be a notification if the time becomes available.