

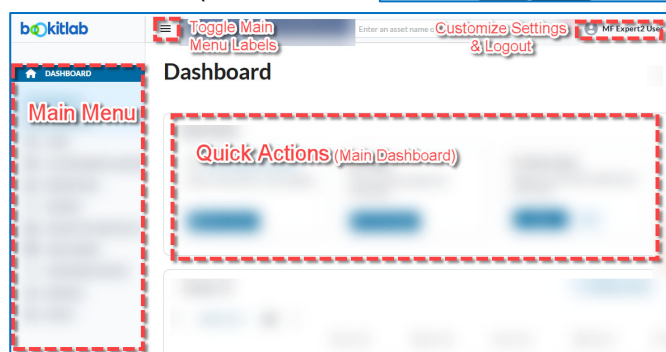
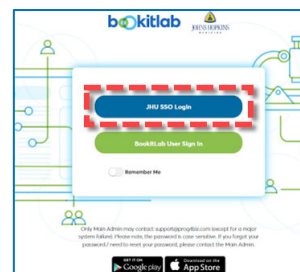
# Intro to MicFac-BookitLab (SSO version)

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## 1. Login (JHU SSO) & Landing page navigation

- 1.1. Go to <https://core.bookitlab.com/microscopy-jhmi/>
- 1.2. Click **JHU SSO Login** button (see right) and use *JHED@jh.edu* to login. Links for installing the *mobile app* are at the bottom of this screen.
- 1.3. For returning users, BookitLab will continue from your *last* screen. For new users, the initial screen is the **Main Dashboard** (see below right). The **Main Menu** is along the left of the screen, and you can use the ☰ icon in the upper-left to **toggle** its text labels to save screen space. When you click your name in the upper-right, a menu to **Customize User Settings** and **Log out** appear. The rest of the Main Dashboard shows **Quick Actions** (customizable) and a timeline schedule of instruments.



- 1.4. **Main Menu** Within the Main Menu is **All Instruments/Assets**, and it has a sub-menu **Fav Instruments** that is a useful shortcut to making reservations on your favorite instruments (see §2.3).
- 1.5. **Quick Actions** widgets can be customized. Potentially useful widgets are:
  - 1.5.1. **Upcoming Reservations** (see §3.1): Quick access to making new reservations, as well as viewing upcoming schedule of reservations.
  - 1.5.2. **Usages**: Quick access to start a last-minute reservation (i.e. 'live usage'); needed for instruments under Access Control (e.g. Zeiss LSM confocals).
  - 1.5.3. **Work Orders**: Quick access to report a problem with the instrument or work area.
- 1.6. **Log out**: Click on your name in the upper-right of the screen and **Log out** is at the bottom of the menu.

## 2. Customizing/Confirming: User Profile, Alerts/Notifications

### 2.1. Confirming Your User Profile (email!)


2.1.1. Confirm your email and Display name.


Click on (a) *your name* in the upper-right of the screen to reveal a drop-down menu.

From the menu, select (b) **User Details** to show your User Profile in BookitLab.

2.1.2. Review your **User Profile**, particularly your Display Name and your email (c) (all communications from BookitLab to this email address).

2.1.3. To change these values, click on

(d)  icon to wake a new window. Edit (e) fields as needed (Full Name is your Display Name). Make sure to click (f) **Save Changes**.



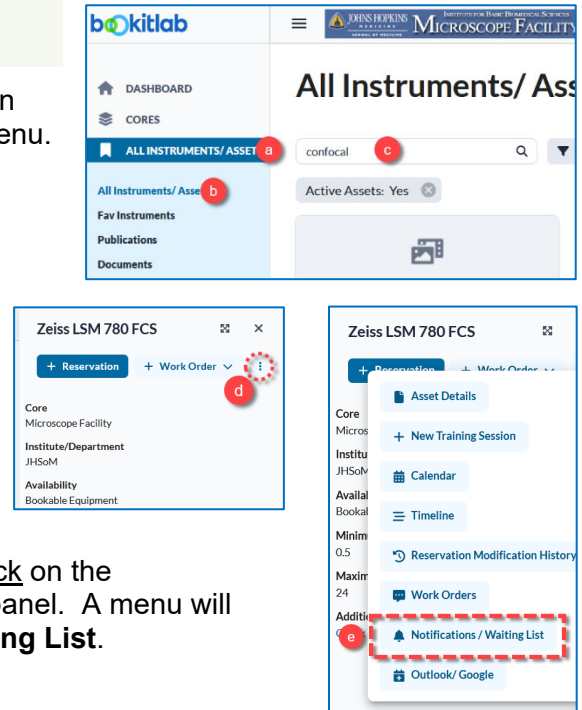
### 2.2. Establishing Reservation Alert Notifications (Instrument-specific)

2.2.1. From the **Main Menu** (left side of screen), click on (a) **All Instruments/Assets**, which reveal a submenu.

Click on (b) **All Instruments/Assets** to show the instruments available in the MicFac. To filter the choices, type appropriate text into (c) **Search** box. This example uses 'confocal' to search.

2.2.2. Click on the **Instrument (Asset)** that you want to attach alert notifications. In the screen shot, the display is showing 'Cards', but 'Table' view will work also. This example used 'Zeiss LSM 780 FCS' as the example. A panel will open along the right side of the screen, listing the details of the instrument.

2.2.3. In the panel describing the instrument details, click on the (d) triples-dots near the upper-right corner of the panel. A menu will appear. Click on the entry (e) **Notifications/Waiting List**.



2.2.4. In the floating panel, **Resource Notification Settings**, there are three fields to consider.

- Resource specifies the **Instrument** that will have an alert notification. Default is the instrument you chose in prior steps, but you could change the Instrument if you wish.

- Upcoming Reservation notification is a great way to get reminders of upcoming reservations. We recommend checking the box and setting the value to 24h in advance. Remember that reservations for popular microscopes (e.g. confocals) cannot be canceled less than 20h prior to the reservation.

- Reservation Cancellations is a waiting list. If you want to be on the waiting list, check the box and specify the window of time. We recommend setting 48h-96h as the time window, spanning 2d-4d ahead.

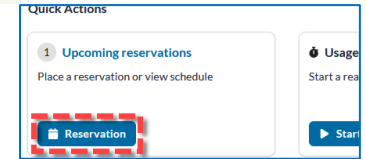
2.2.5. Click the Save button to save changes to your **Notification Settings**.

The screenshot shows the 'Resource Notification Settings' panel. The 'Resource' dropdown is set to 'Zeiss LSM 780 FCS' and is annotated with 'Specify Instrument'. The 'Upcoming Reservation notification' section has the checkbox 'Notify me before reservation start' checked and the value '24' set, annotated with 'Reservation Reminder'. The 'Reservation Cancellations' section has the radio button 'Notify on cancellations occurring in the next' selected and the value '48' set, annotated with 'Wait List (Cancellations)'. A 'Save' button is highlighted with a red dashed box and annotated with 'Save'. A 'Close' button is also visible in the top right corner of the panel.

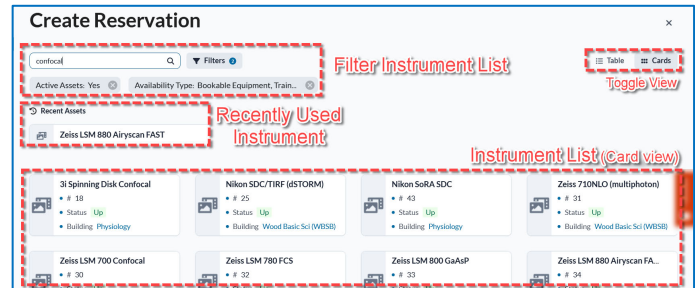
### 3. Quick Actions: Reservations

#### 3.1. Quick Action - Book A Reservation

3.1.1. To create a quick action for a reservation, click on the Reservation button in the Upcoming reservations Widget (see right).

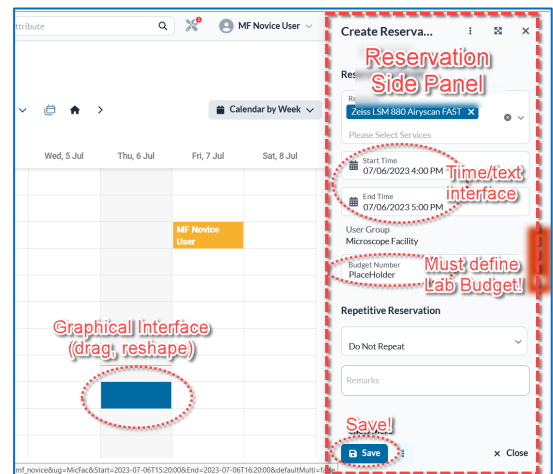


3.1.2. In the Create Reservation window (see below-right), you will first choose the instrument to book a reservation. Each of the possible instruments is either a tile card (Cards view) or a row in a table (Table view) in the bottom half of the screen. Type text in the Search box to filter (this example uses 'confocal' in the Search box); only instruments that match search text should display. Change the display (Table vs Cards) in the upper right of the screen. For convenience, recent choices appear under the search/filter area.



Click on the instrument you want to reserve.

3.1.3. After choosing the instrument, the Calendar Scheduler window opens with the reservation side panel ready to accept details of the reservation. You have a choice of graphical interface to 'draw' in the calendar, dragging and reshaping the reservation time. Alternatively, you can specify the start and end times separately by selecting the text in the reservation side panel.



Unlike our prior WebCalendar, you must specify your lab's Budget Number, particularly if your lab has multiple budgets.

There's more than one way to get to the Calendar Scheduler window, and additional controls of this window are described in §4.1.

3.1.4. Click Save in lower-left of reservation side panel. A 'Reservation created successfully' message should appear and a confirmatory email sent to your User Profile email.

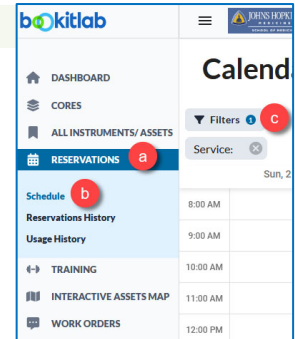
3.1.5. You can cancel your reservation attempt by either clicking the 'x' in the upper-right, or the 'x Close' in the lower-right.

## 4. Alternative Reservation methods: Reservations/Schedule, Timeline

There are multiple ways to get to the graphical **Calendar Scheduler**. Quick Action (see §3.1) is one way. Two other common ways are (1) via the **Reservation** heading on the **Main Menu**, and (2) via the Timelines in the Dashboard. The **Calendar Scheduler** is a powerful user interface to view reservations and *detailed* instructions are included below in §4.1.

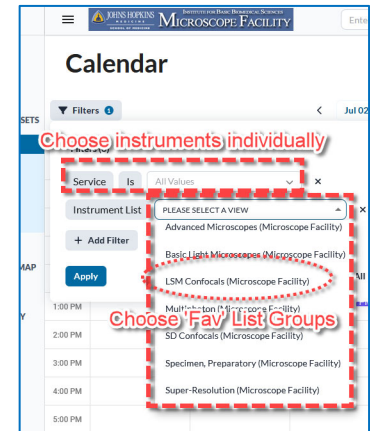
### 4.1. Schedule (*detailed* Calendar Scheduler instructions)

4.1.1. In the Main Menu (left side of screen), click on (a) **Reservations**, which reveal a submenu. Click on (b) **Schedule** to show the **Calendar Schedule** window.

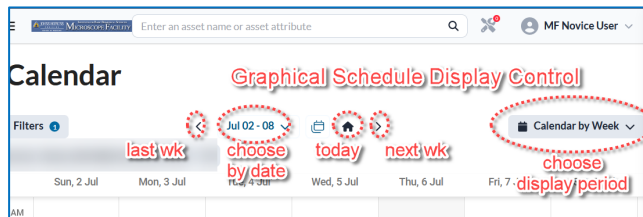


4.1.2. Instruments: If Reservations for too many instruments are showing, click on (c) **Filters**.

- Your *first* time using this tool will require you to specify the *type* of filter apply. From the pop-up menu, choose 'Service', which is individual instruments.
- If you want to filter by individual instruments, select them from the pull-down menu next to **Service** (see right).
- If you want to use a preset **Fav List** groupings, select the appropriate list from **Instrument List** (see right).

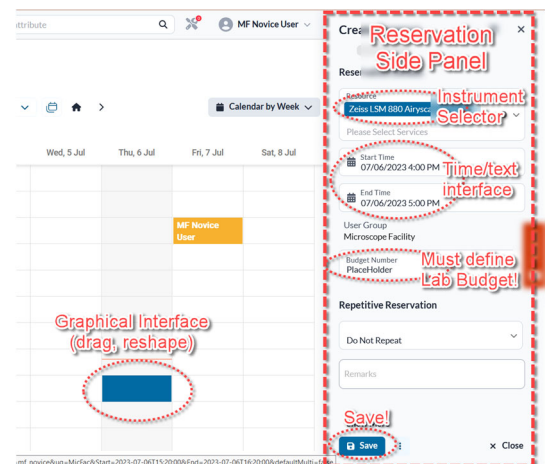


4.1.3. Graphical Calendar Display: The control regions are identified below.



4.1.4. Making Reservations: You can click on the '+ Add Reservation' button in the upper right, or you can draw directly in the graphical Calendar your desired time slot, moving or resizing as needed. The reservation side panel opens to show details of the reservation as you draw.

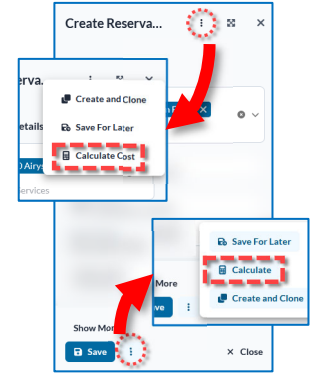
- The Instrument Selector allows you to choose the instrument reservations. *Warning: You should have only one instrument in the selector.*
- The Time/text interface allows you to specify the start and end times directly, fine-tuning any graphical selections.
- You must specify your lab's Budget Number, particularly if your lab has multiple budgets.



- To estimate the cost of the reservation, click on the **triple-dots** in the reservation side panel. Both sets of **triple-dots** (near top and near bottom of panel) bring up similar menu functions, including **Calculate**, which will display the estimated cost of the reservation.

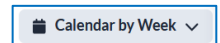
- Click **Save** in lower-left of reservation side panel. A 'Reservation created successfully' message box should appear and a confirmatory email sent to your User Profile email.

To cancel your reservation attempt by either clicking the 'x' in the upper-right, or the 'x Close' in the lower-right.



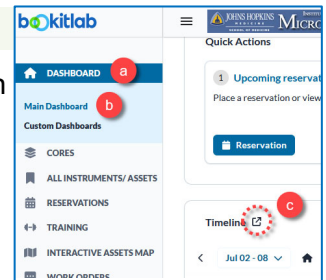
4.1.5. Editing Reservations: Just click on a reservation in the graphical Calendar Scheduler and its details will show in the reservation side panel. You can only alter your own reservations.

4.1.6. Display Period: In the Graphical Display Control area (see §4.1.3 above, button at right), there is a pull-down menu that can change the period of time displayed. Your choices are Day, Week, and Month. In §4.1.3, the button is labeled 'Calendar by Week' (showing week-long view), but the label changes depending on the current period displayed.



## 4.2. Timeline

4.2.1. In the Main Menu (left side of screen), click on (a) **Dashboard**, which reveal a submenu. Click on (b) **Main Dashboard** to show the Quick Actions and Timeline below it. For the full-screen Timeline, click (c) **zoom** icon right next to Timeline above the top-most timeline. The Timeline window should expand to fill the full panel (Quick Actions no longer visible).

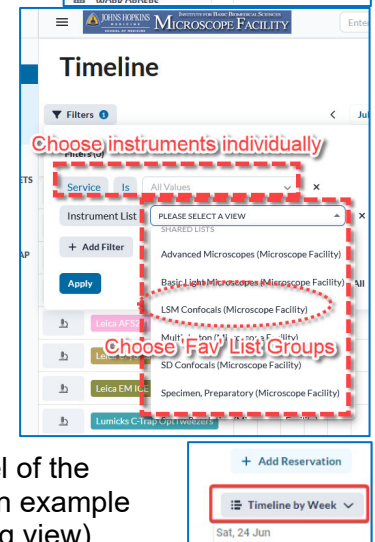


4.2.2. Instruments (Timeline rows): Like Calendar Scheduler, to reduce the number of instruments listed, click on (c) **Filters**.

- Your first time using this tool will require you to specify the type of filter apply. From the pop-up menu, choose '**Service**', which is individual instruments.

- If you want to filter by individual instruments, select them from the pull-down menu next to **Service** (see right).

- If you want to use a preset **Fav List** groupings, select the appropriate list from **Instrument List** (see right).



4.2.3. Time resolution (Timeline width): In the upper-right, there is a pull-down menu that can change the period of time displayed. Your choices are **Day**, **Week**, **Month**, **Quarter**, and **Year**. The label of the menu button changes depending on the current period displayed. In example at right, the button is labeled 'Timeline by Week' (showing week-long view).

4.2.4. Making/ Reservations: The controls are identical to **Calendar** scheduler (§4.1.4), but oriented horizontally. You can draw directly in the graphical **Timeline** your desired time slot, moving or resizing as needed. The reservation side panel opens to show details of the reservation as you draw.

4.2.5. Editing Reservations: Just click on a reservation in the graphical Timeline and its details will show in the reservation side panel. You can only alter your own reservations.