

# Users Guide

The general users guide for resource.cores.utah.edu

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# Login

The cores resource system supports 2 different login formats:

1. System Local Login
2. SAML Supported 2FA Login

Users may login to the system using any of these methods with the following caveats:

1. External users (users without a uNID at the University of Utah) will need to use the system local login as created by the administration office
2. All users must be manually added to the system by requesting access from administration office directly or via a work authorization request.
3. The username/password login directs users to the System login action.
4. The DUO 2FA (SAML) Login process is similar to the LDAP login process but uses the University of Utah Duo servers.

## Internal Users

Users who have an SSO account with the University of Utah (e.g. a uNID) should use the DUO login flow by clicking on the button below.

**University of Utah DUO**

## External Users

Users who do not have a SSO Account with the University of Utah (e.g. a uNID) should use the username and password form below to access the resource system.

**Username (required)**

Username

**Password (required)**

Password

**Login**

**Passsword Reset**

## New User Instructions

All users, regardless of login method, are required to fill out a [Work Authorization](#) prior to being added to the resource system. Instructions for filling out a work authorization are located at the link provided at the bottom of the page on the Work Authorization system start page.

University of Utah users who attempt to login to this system prior to filling out a Work Authorization will receive a "User Not Found" Error. Users receiving this error should fill out a [Work Authorization](#) and contact the [Cores Admin Office](#) if they need expedited access.

## System Local Login

1. Navigate to <https://resource.cores.utah.edu/api/v1/auth/login>

2. Enter your username and password in the provided fields
3. Click the "Login" button

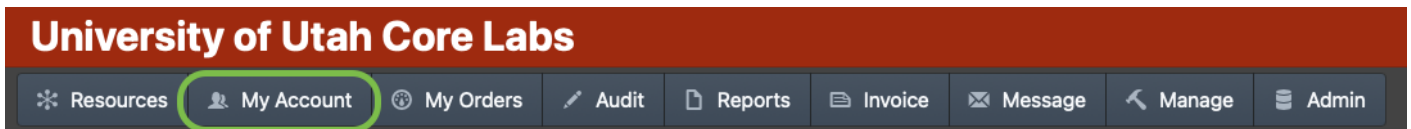
## **DUO 2FA Login**

1. Navigate to <https://resource.cores.utah.edu/api/v1/auth/login>
2. Click the "DUO Login" Button
3. Enter your username and password in the provided fields (uNID and Password)
4. Click "Login"
5. Follow the "Send Me a Push" or "Enter a Passcode" actions.

Note: If you are already logged into the University DUO system (eg. logged on to CIS) clicking the DUO login button will log you on automatically.

# Manage User Account Details

Users can manage their personal contact information, manage message/notification settings and set their default charge account from the "My Account" page.



## Update Details

1. Change any details desired
2. Click the "Save Changes" Button
3. (Optional) Click the "Revert Changes" button to restore the data

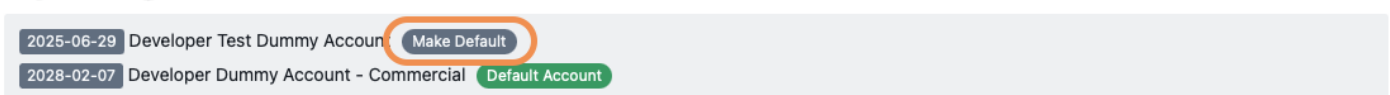
### My Details

The screenshot shows the 'My Details' form. It has several input fields: 'First Name' (Elliot), 'Middle Name (Optional)' (P), 'Last Name' (Francis), 'Email' (ef@genetics.utah.edu), and 'Phone Number' (801-587-8372). Below the fields are two buttons: 'Save Changes' (highlighted with a green circle) and 'Revert Changes'. An orange arrow points to the 'Middle Name (Optional)' field, and a purple arrow points to the 'Save Changes' button. The text 'University Login' is visible at the bottom left of the form.

## Set an account as default

1. Click the "Make Default" button in the "My Charge Accounts" Section

### My Charge Accounts



## Opt Out of Email Notifications

Resources My Account

## My Details

First Name  
Elliot

Email(s)  
u0346559@utah.edu x

Email Add

Opt Out of Email Notifications

Save Changes Revert Changes

## Change login password (Local System Users Only)

1. Enter the desired password in the "New Password" and "Confirm Password" fields
2. Click the "Change Password Button"

Note: Users with LDAP/DUO Logins will see "University Login" in place of the "Update Password" Box

### Update Password

..... 🔑 🔒

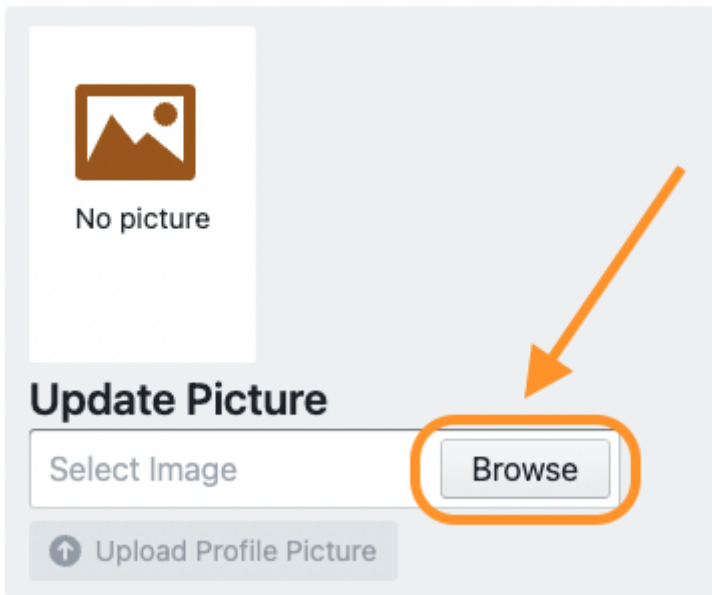
..... 🔒

Change Password

## Profile Picture

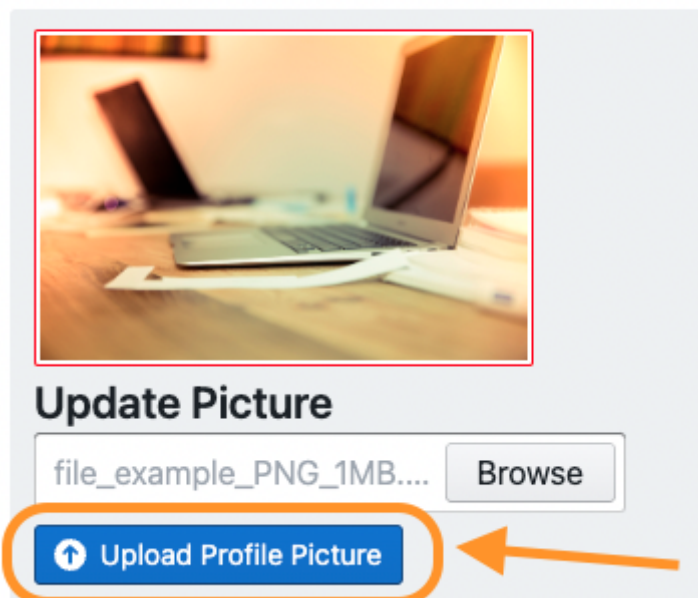
1. To add or change your picture, click the "Browse" button and select an image from your computer. (It must be an image type i.e. .jpg, .png, etc.)

## Profile Picture



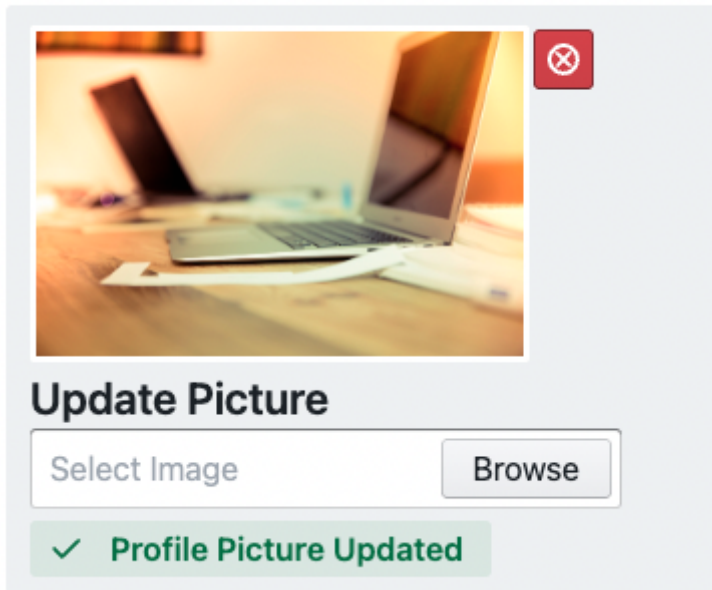
2. Once you have selected an image, you will see a preview of the image with a red border. **Make sure to click the "Upload Profile Picture" button** to upload it to your account details.

## Profile Picture



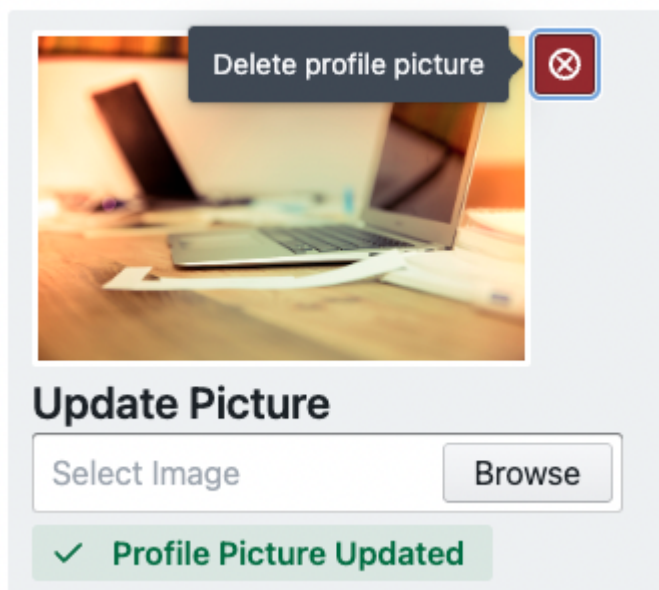
3. After a successful upload, you will see a confirmation that your account profile picture has been updated.

## Profile Picture

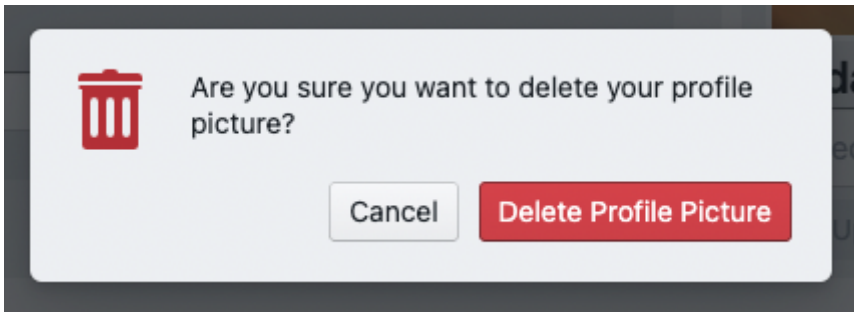


4. To remove a profile picture, click the red 'x' button next to your image.

## Profile Picture

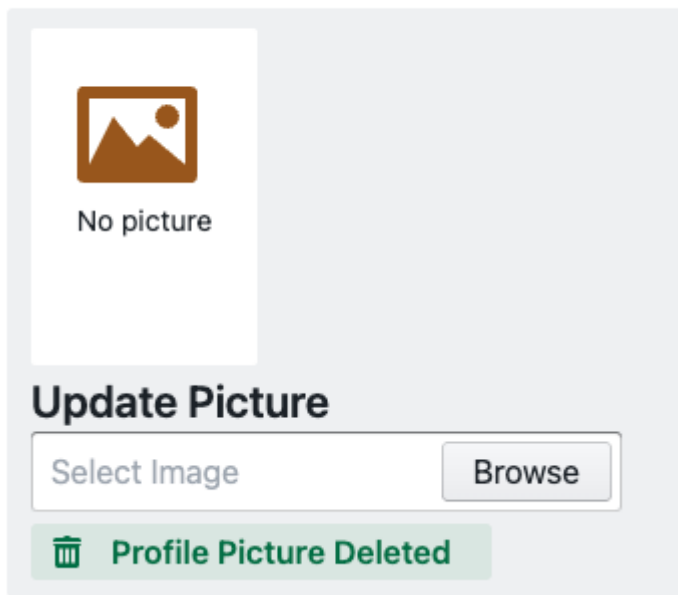


5. You will see a confirmation dialog where you can agree to delete the picture or cancel the action.



6. After you delete your image, you will see a confirmation that it has been deleted and you will no longer see a profile picture on your account details.

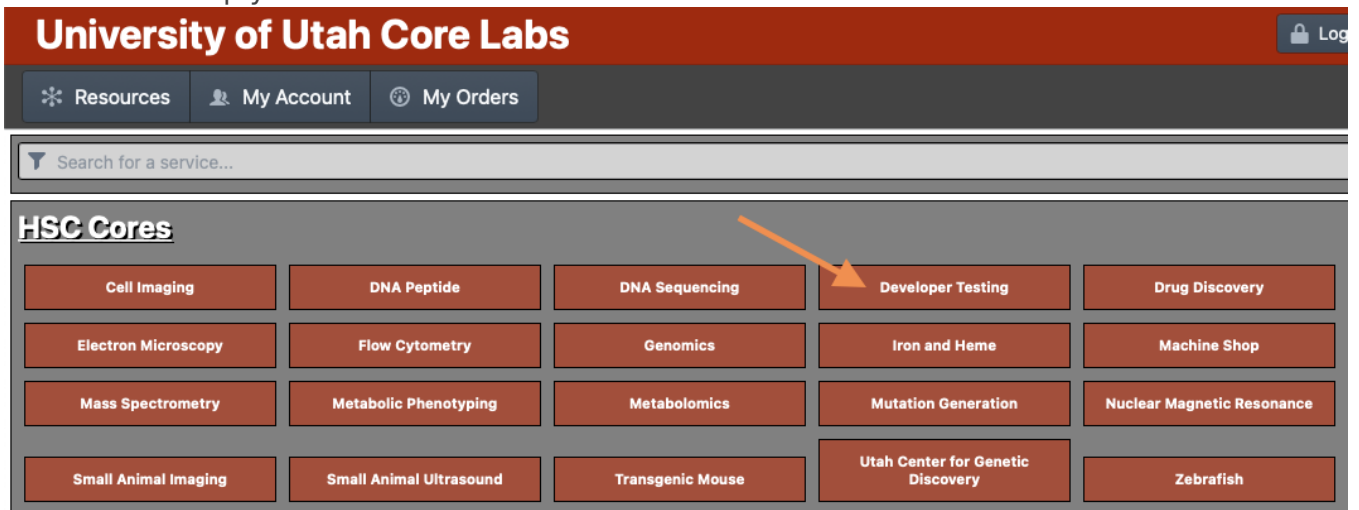
## Profile Picture



# Create a Line Item / Non-Scheduled Order

For groups that have a user facing order forms use the following steps to create a new order.

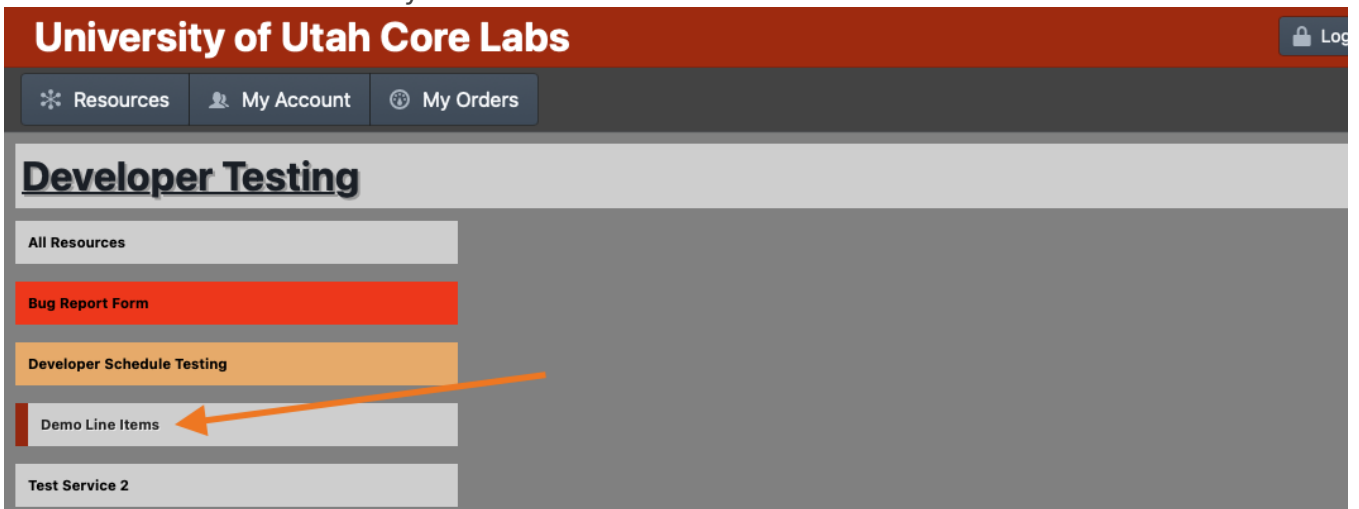
1. Select the Group you want to order from



The screenshot shows the top navigation bar of the University of Utah Core Labs website. The header is dark red with the text "University of Utah Core Labs" and a "Log" button. Below the header is a dark grey navigation bar with three menu items: "Resources", "My Account", and "My Orders". A search bar is located below the navigation bar. The main content area is titled "HSC Cores" and contains a grid of 20 service buttons. An orange arrow points to the "Developer Testing" button in the second row, fourth column.

HSC Cores				
Cell Imaging	DNA Peptide	DNA Sequencing	Developer Testing	Drug Discovery
Electron Microscopy	Flow Cytometry	Genomics	Iron and Heme	Machine Shop
Mass Spectrometry	Metabolic Phenotyping	Metabolomics	Mutation Generation	Nuclear Magnetic Resonance
Small Animal Imaging	Small Animal Ultrasound	Transgenic Mouse	Utah Center for Genetic Discovery	Zebrafish

2. Select the Line Item service you want to order from



The screenshot shows the "Developer Testing" page on the University of Utah Core Labs website. The header is dark red with the text "University of Utah Core Labs" and a "Log" button. Below the header is a dark grey navigation bar with three menu items: "Resources", "My Account", and "My Orders". The main content area is titled "Developer Testing" and contains a list of five service items. An orange arrow points to the "Demo Line Items" item in the list.

Developer Testing
All Resources
Bug Report Form
Developer Schedule Testing
Demo Line Items
Test Service 2

3. Select the account you want to charge this order to. (Note: If no accounts are listed there may be no valid accounts available to be charged. Accounts may be invalidated manually by the administration office OR automatically by the system if the account expires. Contact the admin office for any account issues.)


# University of Utah Core Labs

Resources My Account My Orders

## Static Order Form - Demo Line Items

### User/Account

Elliot Francis

Select Account 

PO Number : PO # (Optional)

Order Date : 2021-03-31

### Order Lines

Description	Amount	Rate	Total
Test Item	0	\$10.00	\$0.00

Vendor Price

(Optional) (Optional) (Optional)

Order Total : \$0.00 x 1 = \$0.00

Reset Form Submit Cancel

4. Click on the button corresponding to the account you wish to charge to

### Select Account

Select	ID	Short Account	Title	Expires
<b>Select</b>	2438	15246	Developer Test Dummy Account	2025-06-29
Select	4049	17013	Developer Dummy Account - Commercial	2028-02-07

Page 1 of 1

Cancel

5. Fill out the remainder of the form and click the "Submit" button. **(Note: If anything is incorrect on the form the "Submit" Button will remain grayed out)**

## Static Order Form - Demo Line Items

### User/Account

PO Number :

Order Date : 2021-03-31

### Order Lines

Description	Amount	Rate	Total
Test Item	<input type="text" value="1"/>	\$10.00	\$10.00

Vendor Price

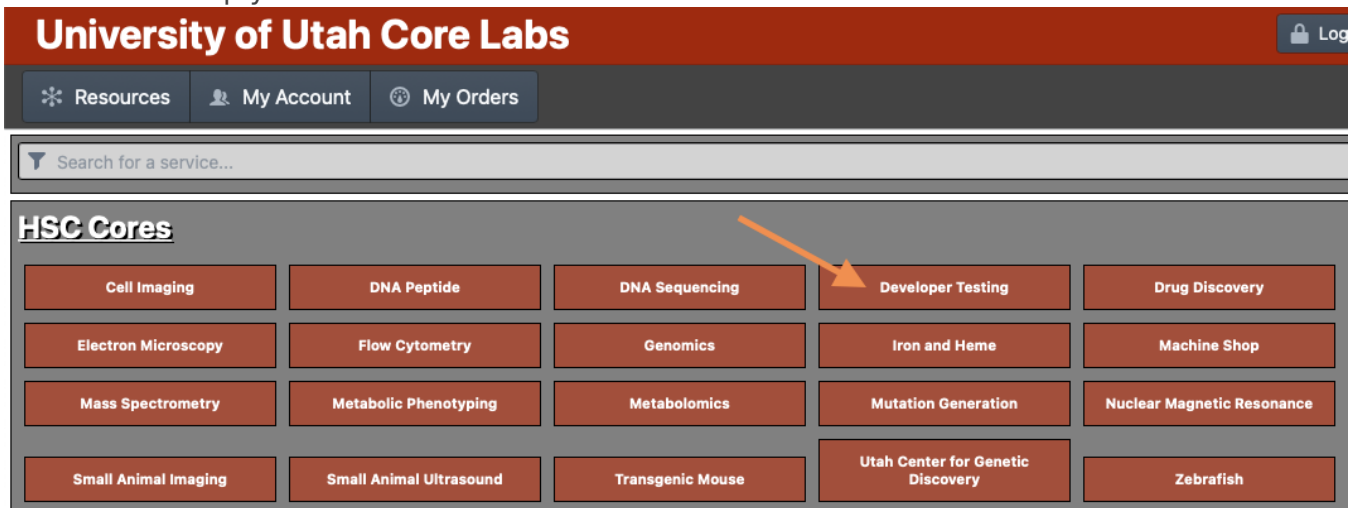
Order Total :  $\$10.00 \times 1.525 = \$15.25$

6. When the system has created the order a dialog with your order number will pop up. Clicking out of this dialog will send you back to the group services list. **If there was an error creating your order the pop-up box will contain the error message. Please screenshot or save the error message text to send to the system administrators for debugging if the error persists between attempts.**

# Create a Scheduled Event / Order

For groups that have a user facing order forms use the following steps to create a new order.

1. Select the Group you want to order from



The screenshot shows the top navigation bar of the University of Utah Core Labs website. The header is dark red with the text "University of Utah Core Labs" in white. Below the header is a dark grey navigation bar with three buttons: "Resources" (with a star icon), "My Account" (with a person icon), and "My Orders" (with a circular arrow icon). Below the navigation bar is a search bar with the placeholder text "Search for a service...". The main content area is titled "HSC Cores" and contains a grid of 20 service buttons. An orange arrow points to the "Developer Testing" button in the second row, fourth column.

HSC Cores				
Cell Imaging	DNA Peptide	DNA Sequencing	Developer Testing	Drug Discovery
Electron Microscopy	Flow Cytometry	Genomics	Iron and Heme	Machine Shop
Mass Spectrometry	Metabolic Phenotyping	Metabolomics	Mutation Generation	Nuclear Magnetic Resonance
Small Animal Imaging	Small Animal Ultrasound	Transgenic Mouse	Utah Center for Genetic Discovery	Zebrafish

2. Select the scheduled service you want to order from



The screenshot shows the "Developer Testing" page on the University of Utah Core Labs website. The header is dark red with the text "University of Utah Core Labs" in white. Below the header is a dark grey navigation bar with three buttons: "Resources" (with a star icon), "My Account" (with a person icon), and "My Orders" (with a circular arrow icon). The main content area is titled "Developer Testing" and contains a list of five menu items. An orange arrow points to the "Developer Schedule Testing" item, which is highlighted in orange.

Developer Testing
All Resources
Bug Report Form
Developer Schedule Testing
Demo Line Items
Test Service 2

3. Select a starting time from the calendar and single click on the slot

**University of Utah Core Labs** Log

Resources My Account My Orders

## Developer Schedule Testing

Sunday, March 28 – Saturday, April 3, 2021

today pick day all services <

	Sun 3/28	Mon 3/29	Tue 3/30	Wed 3/31	Thu 4/1	Fri 4/2	Sat 4/3
all-day							
12am							
1am							
2am							
3am							
4am							
5am							
6am							
7am							
8am							
9am							
10am							
11am							
12pm							

- Adjust the start time and event duration in the details window as needed (Note: Error messaged regarding limits on the event details will appear at the top of the event in red. Some services have restrictions that can be bypassed depending on which account they are getting charged to.)
- Select the account to charge the order to
- Fill out any additional fields as needed
- Click the "Create Event Button"

### Create New Event

Test

Resource (required)  
Developer Schedule Testing

Event Start Time (required)  
2021-04-02 11:00

Event Duration (required)  
30 Minutes

Event Ends  
2021-04-02 11:30

### User/Account

Elliot Francis

Developer Test Dummy Account

Process (required)  
Standard Rate

PO Number (optional)

Description/Comments (optional)

Label

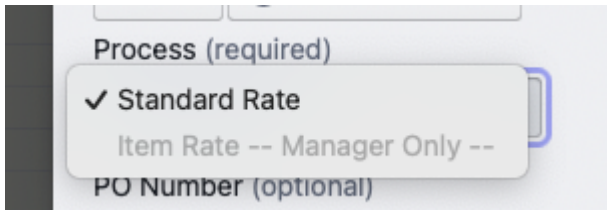
Create Event Cancel

If there was an error creating your order the pop-up box will contain the error message. Please screenshot or save the error message text to send to the system administrators

for debugging if the error persists between attempts.

## Disabled Processes

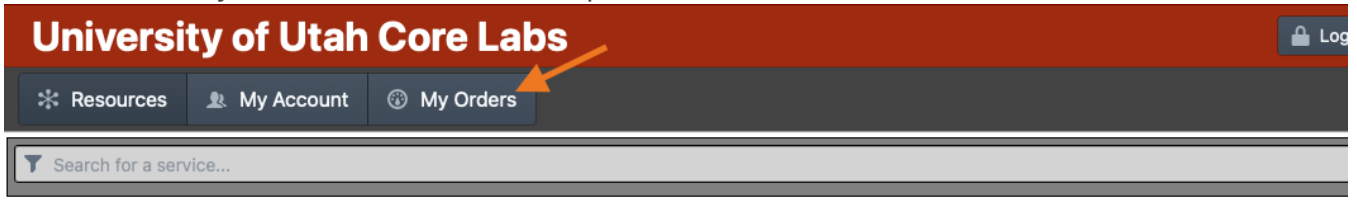
Some processes are only available to facility managers these rates will be be marked as such and will not be selectable



# View Previous Orders / Invoices

To view any orders or invoices that belong to you use the following steps:

1. Click on the "My Orders" button on the top menu bar.



2. Select a date range

## My Orders

Past week  
Past month  
Past 3 months  
Past 6 months  
Past year  
Past 2 years

< February 2021 March 2021 >

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6		1	2	3	4	5	6
7	8	9	10	11	12	13	7	8	9	10	11	12	13
14	15	16	17	18	19	20	14	15	16	17	18	19	20
21	22	23	24	25	26	27	21	22	23	24	25	26	27
28							28	29	30	31			

3. Click on the Order Number or Invoice Number to view the details

### Orders

Order ID	Service	Order Date
<a href="#">312768</a>	MES Mice	2021-03-30 11:42

### Invoices

[My Orders](#) [I'm Account Owner \(PI\)](#)

Invoice ID	Project/Activity	Account Title	Invoice Date
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# Request Charge Account Access

All orders created in the resource management system require an account to be charged against even if that order has a zero dollar value. Accounts come in 4 types:

1. **On Campus Accounts** - These accounts come with a chartfield number and are used to transfer funds internally
2. **Off Campus Educational Accounts** - These accounts are governed by federal intra-institution guideline and have a specific F&A rate automatically attached to them
3. **Commercial Accounts** - These accounts are for outside entities that do work with the universities such as companies or non-profit organizations
4. **Dummy Accounts** - These are internal placeholder accounts that automatically exclude any orders charged to them and are controlled by the cores administration office primarily to allow group managers to schedule time on their own equipment for downtime or maintenance.

## Request Process

Users will be unable to order services in the system until they have an account permission attached to their user login. Users can request that an account permission be added to their account by going to <https://workauth.cores.utah.edu> and filing out a On-Campus or Off-Campus/Commercial Work Authorization form.

## Submission

1. Go to <https://workauth.cores.utah.edu>
2. Select either "On Campus" if you are doing work for a department of the University of Utah or "Off Campus/Commercial" if you are an external entity.
3. Fill out the form:
  1. Submitter Information - Your contact information
  2. PI/Approving Contact - The contact information for the person responsible for authorizing charges on the account in question
  3. Accounting Contact - The contact information of the person responsible for resolving issues with the account
  4. Any comments
  5. Add the list of users approved to be added/removed from the account. This includes anyone listed in the previous sections if they need authority to charge to the account in question.
4. Submit the form

## Approval

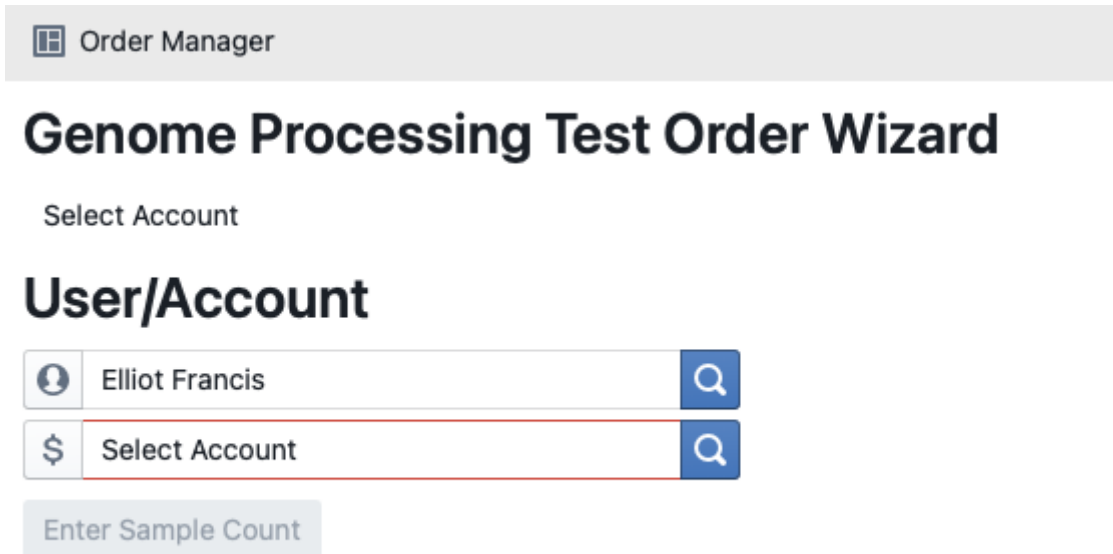
After submission the work authorization system will send an email to the individual listed as the approving contact. To ensure that they are ready to respond to this email it is recommended that they be notified prior to submitting the request. This person will be provided a link to open and review the submitted for approval or denial. If the request is approved then the cores administration office will be notified by email and the request processed. If denied the submitter will receive an email with the denial as the address provided.

After the admin office has processed the request they account access should be available immediately after processing. For questions about a submitted work authorization contact the cores admin office.

# Create a Black Box Sample Processing Order

The Black Box Sample processing system uses an order wizard that will guide the user through the ordering process.

1. Select an account



Order Manager

## Genome Processing Test Order Wizard

Select Account

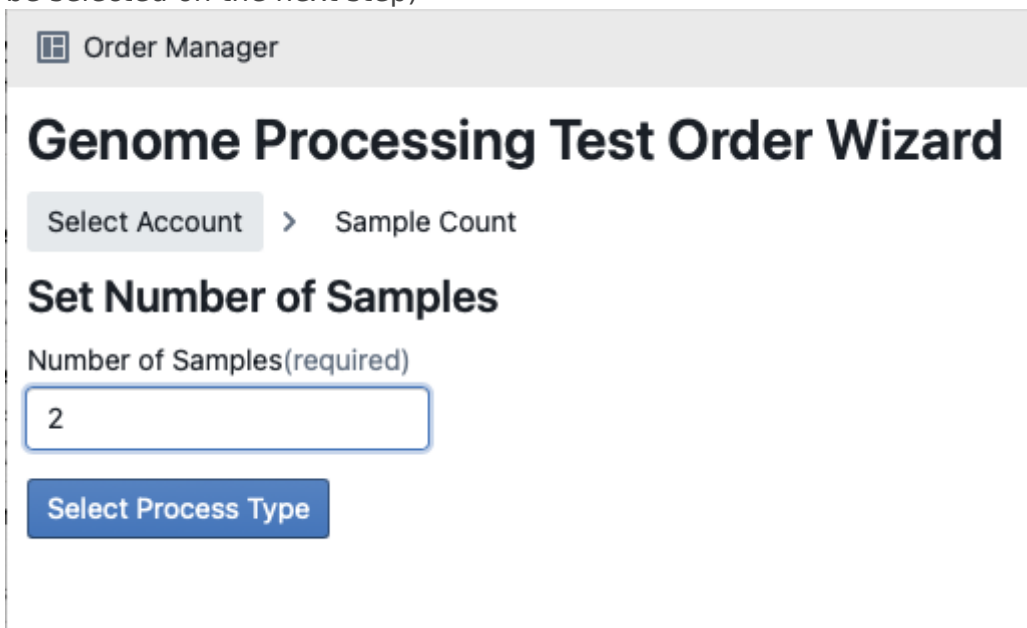
### User/Account

Elliot Francis

Select Account

Enter Sample Count

2. Enter the number of samples to be submitted (Note: This can affect what processes can be selected on the next step)



Order Manager

## Genome Processing Test Order Wizard

Select Account > Sample Count

### Set Number of Samples

Number of Samples(required)

2

Select Process Type

3. Select from the available processes that can be performed

Order Manager

## Genome Processing Test Order Wizard

Select Account > Sample Count > Select Process

### Select Process

Tubes (Minimum 1 Samples) Plate (Minimum 95 Samples) 4 Plate (Minimum 380 Samples)

Enter Samples

4. Enter the sample information

Order Manager

## Genome Processing Test Order Wizard

Select Account > Sample Count > Select Process > Enter Samples

### Enter/Upload Samples

Upload File

Index	Sample Name	Sample Type	
1	<input type="text" value="Test"/> <input type="button" value="Set As Empty"/>	<input type="text" value="One"/>	
2	Empty <input type="button" value="Set Open"/>	<input type="text" value="Two"/>	\$1.00

Next

5. Enter any additional order details or instructions

Order Manager

## Genome Processing Test Order Wizard

Select Account > Sample Count > Select Process > Enter Samples > Notes

### Enter Notes

Description

None

Notes to Core Facility

None

Administrator Notes

Verify Submission

6. Review the submission data and click the submit button

Order Manager

## Genome Processing Test Order Wizard

Select Account > Sample Count > Select Process > Enter Samples > Notes > Verify

### Verify Submission

**Ordered For/By :** Elliot Francis  
**Account to charge :** Developer Test Dummy Account (x)  
**Number of Samples :** 1  
**Selected Process :** Tubes

Submit Order

7. The system will then display your order number and send you to the "Order Manager" page so you can view your submitted orders and their status.

Order Manager

## Genome Processing Test Order Wizard

Select Account > Sample Count > Select Process > Enter Samples > Notes > Verify

### Verify Submission

**Ordered For/By :** Elliot Francis  
**Account to charge :** Developer Test Dummy Account (x)  
**Number of Samples :** 1  
**Selected Process :** Tubes

Viewing : Submitted

New Order

Order ID #


Open Order


Order Number	Service Name	Actions	# of Samples	Processing Status	Owner (PI)	Not
305302	Genome Processing Test	<a href="#">Q Details</a>	2	Submitted	Elliot Francis <a href="#">EIHG IT Group</a>	Yes
232885	MSSP Testing	<a href="#">Q Details</a>	1	Submitted	Elliot Francis <a href="#">EIHG IT Group</a>	No

# Create a Walkup Order/Event

Walkup services are instruments that are designed to be used for short durations as they are available rather than being scheduled in advance.

Walkup Instrument

 Wizard



 Walkup Events

## Test Walkup Service



In Process/Abandoned Events

No In Process Events

Owner

 Elliot Francis 

Charge Account

 Select Account 

Process (required)

Standard Rate 

Start

End



When using a walkup service you will be presented with an account selector and start/stop buttons. After selecting an account the Start button will be illuminated and you can then start your usage.

## Test Walkup Service



In Process/Abandoned Events

No In Process Events


Owner

 Elliot Francis 

Charge Account

 Developer Test Dummy Account 

Process (required)

Standard Rate 



Start

End

After clicking the start button the event will start.

## Test Walkup Service


Owner

 Elliot Francis 

Charge Account

 Developer Test Dummy Account 

Process (required)

Standard Rate 

 **Usage Timer Active**

Started at 2022-06-22 10:56:22

Start

End

If you need to leave the page or accidentally close the window you can resume by returning to the page and clicking on the blue button for the already started event.

Resumed events will be treated as one continuous usage period from the the the event was opened. Be sure to close out/end your events for each use session otherwise the intervening time will be counted as part of the resumed session.

Walkup Instrument

Wizard

Walkup Events

## Test Walkup Service

In Process/Abandoned Events

Resume 2 (Started 2022-06-22 10:56:22 by [Elliot Francis] )

Owner

Elliot Francis

Charge Account

Select Account

Process (required)

Standard Rate

Start

End

In process/abandoned events can also be viewed in the events manager list.

Walkup Instrument

Wizard

Walkup Events

In Progress/Abandoned

ID	Service	Status	Start Date	End Date	Parent Order	Attached Event	User	Actions
3	Test Walkup Service	In Progress/Abandoned	2022-06-22 10:57	<No End Date>			Elliot Francis	Force Complete Delete

Once you are finished with your usage click the end button to close out the event. Completed events can also be viewed in the events manager.

Completed

Start Date between

2022-05-22

2022-06-22



Page 1 of 1



ID	Service	Status	Start Date	End Date	Parent Order	Attached Event	User	Actions
2	Test Walkup Service	Completed	2022-06-22 10:56	2022-06-22 10:57	358066	190605	Elliot Francis	No Actions Available
1	Test Walkup Service	Completed	2022-06-21 10:50	2022-06-21 10:51	357937	190518	Elliot Francis	No Actions Available



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