




# Create and Update Appointments

## Creating Appointments

To create a new appointment on an instrument, access the "CORE" tab in the RSS. Under "Scheduling," select "Instrument Scheduler." Follow the instructions in the view schedule section to navigate to the date you'd like to create the appointment.

To create an appointment for an instrument using the online scheduler, you must first be given authorization by the core facility. [Contact the core facility](#) for additional guidance.

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**RSS - Research Support System**    Thursday, June 13, 2019



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










**Instrument Scheduling**

cores:

instrument:

date:  
 

**Day View - 06/13/2019**    

time	bill to	scheduled by	machine operator
 7:00 AM			
 7:15 AM			
 7:30 AM			
 7:45 AM			
 8:00 AM			
 8:15 AM			
 8:30 AM			
 8:45 AM			
 9:00 AM			
 9:15 AM			
 9:30 AM			
 9:45 AM			
 10:00 AM			
 10:15 AM			
 10:30 AM			
 10:45 AM			
 11:00 AM			

## Show Step-by-Step Details

In the "Day View", click the "add" button next to the starting time for which you'd like to create a new appointment.

Instrument Scheduling

Classic Me

core:  
Flow Cytometry Research Facility

instrument:  
LSR II

date:  
07/02/2019

Day View

Month View

Day View - 07/02/2019

	time	bill to	scheduled by	machine operator
	7:00 AM			
	7:15 AM			
	7:30 AM			
	7:45 AM			
	8:00 AM			
	8:15 AM			
	8:30 AM			
	8:45 AM			
	9:00 AM			
	9:15 AM			
	9:30 AM			
	9:45 AM			
	10:00 AM			
	10:15 AM			
	10:30 AM			
	10:45 AM			
	11:00 AM			
	11:15 AM			
	11:30 AM			

In the dialog box that appears, check the "Reserved Appointment Times" section to verify the instrument, date, and duration of the appointment you would like to schedule.

All times entered into the instrument scheduler are in the 24-hour format.

Reserved Appointment Time(s)

begin date & time (mm/dd/yyyy & military time)

07/02/2019

08:45

end date & time (mm/dd/yyyy & military time)

07/02/2019

09:45

LSR II

repeat

Next, enter the name of the person who will be billed. **This should be the person who is financially responsible for the project being conducted**, typically a Principal Investigator or University faculty member. While research associates, postdoctoral researchers, and students may request services from core facilities, the financially responsible person will typically be the

person who is listed as principal investigator on the grant being debited for the work.

Enter a few letters of their last name into the "Bill To" field, then click the name of the person to select them. Once selected, their name will appear in the grey box next to the "Bill To" field.

Appointment Details

bill to (last name, first name)

geig

name	dept.
Geiger, James M	UNMC - Research Data Specialist I - Vice Chancellor for Research

contact (last name, first name)

email:

phone:

contact info

project id

protocol (\*\*use the ctrl key to select multiple protocols\*\*)

bio hazardous?

☐ Yes

☒ No

machine operator

Appointment Details

bill to (last name, first name)

contact (last name, first name)

email:

phone:

contact info

project id

protocol (\*\*use the ctrl key to select multiple protocols\*\*)

bio hazardous?

☐ Yes

☒ No

machine operator

service type

op manual/auto

Auto

If the contact person for the appointment should be different from the person who is being billed, enter their name into the "contact" field. This field works the same as the "bill to" field.

This is generally the person who will be responsible for the samples. Generally, administrative assistants or departmental administrators should not be entered as the contact. Entering contact information will add that person to any automated notices that are associated with the appointment.

The contact field is a required field. If the billed person is also the requesting person enter their name again in this field.

This field works the same as the "bill to" field. Enter a few letters of their last name into the "contact" field, then click the name of the person to select them. Once selected, their name will appear in the grey box next to the "contact" field.

Enter any other contact information, like alternate numbers or good times to call, in the "contact info" field.

Appointment Details

bill to (last name, first name) \*

Geiger, James M

email: james.geiger@unmc.edu

phone: 402-559-4565

contact (last name, first name)

Wilkie, Linda M

email: lwilkie@unmc.edu

phone: 402-559-7649

contact info

Please call cell phone, 402-555-8769

project id

protocol (\*\*use the ctrl key to select multiple protocols\*\*)

bio hazardous? \*

Yes

No

machine operator \*

Information can be entered into the project fields to tie charges to a specific project. An internal ID may be included in the project ID field and the IRB/IACUCC protocol may be selected.

If the sample being submitted for analysis is biohazardous, mark the "yes" option.

project id

protocol (\*\*use the ctrl key to select multiple protocols\*\*)   
124-07-EP-IRB-Jennifer Larsen, MD  
382-08-FB-IRB-Jennifer Larsen, MD

bio hazardous? ☐ Yes ☒ No

In the machine operator dropdown, select the individual who will be performing the service or analysis. This may be a core facility staff member or a lab staff member who has received training from the core facility. If you're unsure who to select as the machine operator, contact the core facility.

The service type dropdown will list the available services that can be provided by the selected operator on the machine or instrument being scheduled. Select whichever one needs to be performed.

Once the bill to, machine operator, and service type fields have been entered, the application will calculate and display the estimated charges for this appointment.

Appointments made in the online scheduler must include a payment method in the form of a cost object.

## Edit Appointment

To edit an existing appointment on an instrument, access the "CORE" tab in the RSS. Under "Scheduling," select "Instrument Scheduler." Follow the instructions in the view schedule section to navigate to the date of the appointment.

**Appointments cannot be edited after having started.** Additionally, core facilities are allowed to set appointment edit lockout times. Contact the core facility to change the details of an appointment that has already occurred, or is occurring soon.

## RSS - Research Support System

Monday, July 15, 2019

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## Instrument Scheduling

core: Flow Cytometry Research Facility	instrument: LSR II Green	date: 05/03/2019		<a href="#">Day View</a>	<a href="#">Month View</a>
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## Day View - 05/03/2019

	time	bill to	scheduled by	machine operator	
	7:00 AM				
	7:15 AM				
	7:30 AM				
	7:45 AM				
	08:00 - 09:00 AM	Cell Analysis Facility - UNMC Core Facility	Victoria Smith	Victoria Smith	
	9:00 AM				
	9:15 AM				
	9:30 AM				
	9:45 AM				
	10:00 AM				
	10:15 AM				
	10:30 AM				
	10:45 AM				
	11:00 AM				
	11:15 AM				
	11:30 - 12:30 AM	James Geiger	James Geiger	James Geiger	
	12:30 PM				
	12:45 PM				
	13:00 - 13:30 PM	Cell Analysis Facility - UNMC Core Facility	Victoria Smith	Victoria Smith	
	13:30 - 14:15 PM	Shannon Buckley-Mckeown	Heather Vahle	Heather Vahle	
	14:15 PM				

## Show Step-by-Step Details

In the "Day View", click the "edit" pencil icon next to the starting time for which you'd like to edit an appointment.

	07:30 AM				
	07:45 AM				
	08:00 AM - 09:00 AM	Flow Cytometry Research Facility - UNMC Core Facility	Victoria Smith	Victoria Smith	
	09:00 AM				
	09:15 AM				
	09:30 AM				
	09:45 AM				
	10:00 AM - 13:00 PM	Zaid Al-Kadhimi	Holly Britton	Holly Britton	
	13:00 PM - 14:00 PM	Tammy Kellan	Cortney Madsen	Cortney Madsen	
	14:00 PM				
	14:15 PM				
	14:30 PM				
	14:45 PM				
	15:00 PM - 17:00 PM	Kyle Hewitt	Linda Chee	Linda Chee	
	17:00 PM				
	17:15 PM				

This will open the appointment allowing you to adjust the necessary fields. Type the corrected entries into the corresponding fields. Adjust as many of the fields as necessary

### Reserved Appointment Time(s)

begin date & time (mm/dd/yyyy & military time)

03/26/2021



13:00

end date & time (mm/dd/yyyy & military time)

03/26/2021



14:00

LSR II Green

repeat

### Appointment Details

bill to (last name, first name)



Kielian, Tammy L  
email: tkielian@unmc.edu  
phone: 402-559-8002

contact (last name, first name)



Madsen, Cortney E  
email: cortney.heim@unmc.edu  
phone: 402-559-8001

contact info

project id

protocol (\*\*use the ctrl key to select multiple protocols\*\*)

08-05-011-ABL2-IBC-Tammy Kielian, PhD  
16-091-09-FC-IACUC-Tammy Kielian, PhD  
16-123-10-FC-IACUC-Tammy Kielian, PhD  
177-14-FB-IRB-Tammy Kielian, PhD  
18-042-02-FC-IACUC-Tammy Kielian, PhD

bio hazardous?

☐ Yes ☒ No

machine operator

Madsen, Cortney E

service type

Supervised Data Acquisition - I / Hourly

op manual/auto

Manual

**End dates and times must occur after the begin date and times** If you need to edit a date/time span such that the new begin time occurs after the current end date/time start by adjusting the end date/time to avoid receiving an error.

When you are done making your adjustments click the save button at the bottom of the screen. You will receive a confirmatory pop-up if your changes have been saved successfully. Do not

click the cancel or back button during this process.

OMPOUND INTER... OER Home Page ... WebHome Main T... Imported From IE

devqa.unmc.edu says  
The appointment has been successfully saved.

04:30 AM

contact info

project id

protocol (\*\*use the ctrl key to select multiple protocols\*\*)

bio hazardous? ☐ Yes ☒ No

machine operator

service type  op manual/auto

misc service types

Estimated Charges: \$97.50

apply to all machines?

payment method(s) (\*\*only active sap cost object display.)

type	account(s)	po#	chrg amt	chrg %	
Cost Object	3453012095612		97.50	100.00	

notes

note on invoice yes: ☐ no: ☒

show

OK

## Cancel Appointment

To cancel an existing appointment on an instrument, access the "CORE" tab in the RSS. Under "Scheduling," select "Instrument Scheduler." Follow the instructions in the view schedule section to navigate to the date of the appointment.



**Core facilities are allowed to set cancellation lockout times.** These may vary by core and by instrument. To avoid being charged for a no-show appointment, contact



the core facility to cancel your appointment within the lockout window.

## Show Step-by-Step Details

Navigate to the appointment that you would like to cancel. Select the "delete appointment" icon from the far right column.

09:45 AM				
10:00 AM - 13:00 PM	Zaid Al-Kadhimi	Holly Britton	Holly Britton	
13:00 PM - 15:30 PM	Tammy Kellan	Cortney Madsen	Cortney Madsen	
15:00 PM - 17:00 PM	Kyle Hewitt	Linda Chee	Linda Chee	
17:00 PM				
17:15 PM				
17:30 PM				

This will open a new dialog box asking for the reason for the cancellation. Uncheck the "send email" checkbox unless you want to notify the other named persons on the appointment of the cancellation. Click the "Cancel Appointment" button to complete the cancellation.

### Delete Appointment

reason for cancellation (limit 255 characters)

Cells died. Unable to complete experiment|

flag as down time ☐

send email ☒ 1

Cancel Appointment 2

Cancel

**DO NOT click the cancel link at the bottom of the pop-up.** This will "cancel" your cancellation. Use the "Cancel Appointment" button to remove an appointment from the schedule.

Revision #12

Created 19 November 2019 17:00:43 by James Geiger

Updated 29 June 2021 19:18:25 by Linda Wilkie