

# **EquipMe Documentation**

Connecting researchers with campus resources

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## PURPOSE

This document provides information about EquipMe’s background and how to use EquipMe.

EquipMe is a web-based reservation system that allows researchers to access Jefferson research service centers. Jefferson research facilities can easily display equipment/services they have to offer, allowing researchers a quick and streamlined way to access any research resources they may need.

EquipMe simplifies sharing by providing researchers and facility managers with a single space for scheduling services for their research. The app also simplifies how services are billed to the investigator. By putting a more formalized and traceable sharing system in place, EquipMe improves record-keeping and promotes accountability for high-value assets.



## WHO IS THIS GUIDE FOR?

### If you are a researcher...

Use EquipMe to request a service/equipment on a specific day and time. Requests will be reviewed and approved by the facility before your reservation can occur.

### If you manage research equipment...

Use EquipMe to administer your equipment or upload what services you offer to researchers. You can approve or deny incoming reservation requests, check on past events, add standard pricing and even customize an invoice before it is sent to the researcher. EquipMe maintains a history of reservations that have been completed, those that you denied, and those where the researcher was a "no show." The application streamlines the billing process by tracking the number of completed reservations at your facility and compiling a report with the accumulated cost at the end of each month. These reports are formatted to the IDT template and will be sent to the billing admin to complete the billing process. If necessary, facilities can manually adjust the amount that is billed for any individual reservation.

## WHAT DOES EQUIPME DO?

EquipMe is a reservation system that allows you to easily view and reserve the Equipment needed for you next research project. See how to use EquipMe and set up an account as a new [External Investigator here.](#)

### Research Investigators:

- Easily view and reserve available equipment or services
- Receive reservation reminders and invoices via email

### Principal investigators:

- Comfortably add new services at any time
- Easily administer your facility, schedule, staff and equipment
- Automatically receive a summary of your months billing activity
- Customize each invoice to your needs

## WHY DID WE CREATE EQUIPME?

The request for a reservation application originally came from Brian Squilla, the Senior VP of administration, academic provost.

Previously, there was NO formal tracking of equipment at Jefferson, outside of the Cancer Center. This led to duplicate equipment purchases, unknown users and little awareness of services offered. The equipment we spent so much time and effort retrieving for the university, was not being utilized to its fullest potential.

The purpose of this project is to enhance the research experience at Jefferson by providing a tool for research centers to share their services. Creating an in-house application allows us to customize features, easily add or edit equipment, and take ownership of our billing process without weighing down staff. Tracking utilization also helps to maintain equipment us keep service centers operational.

WHY DON'T MY CHARGE CODES APPEAR IN EQUIPME? THIS PREVENTS ME FROM ENTERING A RESERVATION REQUEST

**To Access a Grant Charge Code:**

Reservation requests can only be entered by active researchers. To become an active researcher in EquipMe, you will need to have a PI approve you to work under their research grant/charge code usually begins with 080). If you believe that you should have access to use a charge code, but the charge code does not appear in EquipMe, please contact the grant's Principal Investigator and request to be added as an authorized designee. The Principal Investigator can authorize designees using MyHR. See instructions 1-6 below:

\*Note: Charge codes will appear in EquipMe 24 hours after designee is added\*

**To Access a Department Charge Code:**

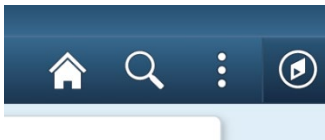
To get a **department charge code** (usually begins with 108) to appear in EquipMe, **Enter a ServiceNow ticket**

[Other Request](#)

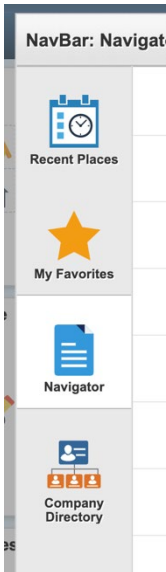
In the description box please include your **name, campus key, and charge code** you would like to appear in EquipMe, mention "to be directed to the EquipMe Service Now Team". You will be given a ticket number for this request. Your ticket will be addressed as soon as possible. Note: when using a department charge code, the billing admin for the department will be notified every time funds are used.

See instructions below:

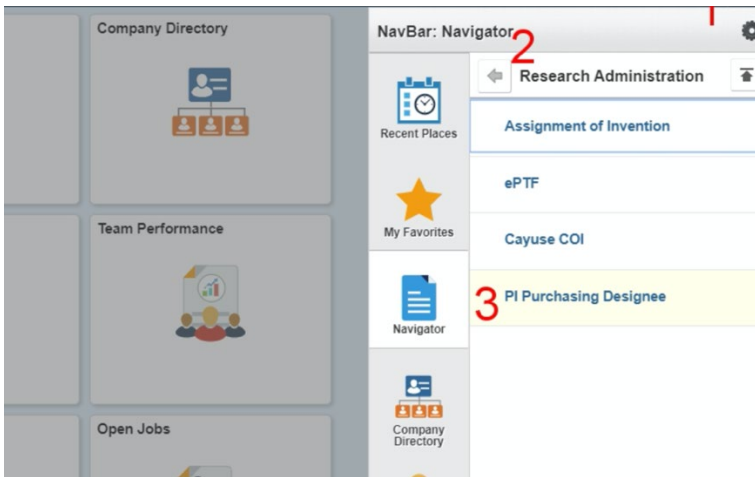
1. Go to [MyHR](#) Website.
2. Go to Navigation bar on the righthand side



3. Select "Navigator"



4. Select "Research Administration"
5. Select "PI Purchasing Designee"



## 6. Enter the Designee's Information



PI Purchasing Designee

*I, the Principal Investigator for the above-referenced TJU Account Numbers, hereby authorize these purchasing designees to request orders on my behalf. Prior to requesting the order, as required, I will review and discuss the order requests with these Designees to ensure all orders adhere to all university, sponsor, and federal guidelines and regulations of the grant accounts that I am charging.*

*I am certifying that all purchases processed by my designees are allocable to the specific aims of each grant prior to ordering.*

Empl ID 000040790 Ryan Tomlinson Product ALL Refresh

Product N28601 Submission Number A19-0166-001 Grants Title Effect of Celecoxib and muMab911 on Stress Fracture Risk and Repair in Mice	Assigned To 000092096 Name Nicholas Ruggiero Assigned To 000930264 Name Bradley Snyder
Product S33401 Submission Number A19-0222-001 Grants Title NGF-TrkA Signaling in Dental Implant Osseointegration and Osseoperception	Assigned To 000930264 Name Bradley Snyder
Product S33701 Submission Number A19-0237-001 Grants Title NGF-TrkA Signaling in Load-Induced Bone Formation	Assigned To 000930264 Name Bradley Snyder
Product U12901 Submission Number A18-0053-001 Grants Title The Role of NSAIDs in Osseointegration of Dental Implants	Assigned To 000930264 Name Bradley Snyder

\*Note: Charge codes will appear in EquipMe 24 hours after designee is added\*

### As a Principal investigator:

The charge codes that appear in EquipMe originate from PeopleSoft HR and the Research Administration Center of Excellence (RACE). As a principal investigator you should have access to your own charge codes in [MyHR](#) at any time. To have these charge codes appear in EquipMe, you will need to list yourself as a designee to that code in MyHR. Please follow the step-by-step instructions above ^ to add yourself as a designee.

\*Note: Charge codes will appear in EquipMe 24 hours after designee is added\*

If appropriate charge codes do not appear in EquipMe and you are not able to resolve the issue with these instructions, submit a ServiceNow Ticket and direct to the **EquipMe ServiceNow Team**.



## HOW DOES BILLING FOR EQUIPMENT WORK?

On the first of every month, a Billing Report email will be sent to lab operators, summarizing reservations that occurred during the previous month along with the dollar amounts to be billed. The lab operator must confirm the monthly billing statement is correct, make any adjustments needed and send to the billing administrator. The billing admin will complete the billing process to collect appropriate funds.

## WHAT ARE THE DIFFERENT ROLES/PERMISSIONS THAT I CAN HAVE WITHIN THE EQUIPME APP?

**Research Investigator** - Can only request equipment reservations. This is the default role.

If you are involved in facility operations, you will be able given an ADMIN view. Admins will be assigned one of these roles:

**Facility Owner**- The facility owner is involved in the onboarding and maintenance of facility staff. They are responsible for delegating roles and accounts for the facility Equipment and services offered.

**Facility Manager** – Can approve and deny equipment reservations. Can adjust the duration of a reservation (which changes the hours billed). This role is given to the manager who is in charge of the piece of the equipment.

**Lab Operator**– Can approve and deny equipment reservations. Can adjust the duration of a reservation (which changes the hours billed). While this role has the same permissions as the Facility Manager, Lab Managers are delegated by the Facility Manager by choice. For example, a Facility Manager may want to add a Lab Manager who can handle approving and denying reservation requests at times when the Facility Manager is on vacation.

A piece of equipment's Facility Manager and Lab Manager(s) are specified when a piece of equipment is added into EquipMe. If you believe that you are not set up with the correct roles within EquipMe, write a ServiceNow ticket.

**Billing Admin**- The billing admin is responsible for receiving the billing report from the lab operator at the end of each month, adjusting any info necessary and forwarding to IDT

**Trainer**- The trainer is responsible for training investigators to use the equipment at the facility. If the facility resorts its training to equipment vendor, the trainer is responsible for scheduling with the vendor. If there is no training required, no trainer is needed.

## HOW ARE PRICING STRUCTURES DETERMINED?

The sample, animal, and hourly rate per equipment is determined by the equipment's facility manger, and it is provided at the time the equipment/service is added to EquipMe.

If you are a facility manager and you need to change your pricing, you can do so at any time using the equipment management page.

1. Navigate to the facility view
2. On the calendar page, select "equipment"
3. Select which Equipment you would like to alter
4. Adjust the pricing per hour, sample, or animal and click "save"

## WHO AT JEFFERSON CAN USE EQUIPME? CAN OUTSIDE INSTITUTIONS RESERVE JEFFERSON EQUIPMENT?

The ability to reserve equipment through EquipMe is available to anyone with a campus key. If you are a facility looking to provide services to outside individuals, you are able to do so following the instructions below:

1. External Investigators must be provided a campus key and password, as part of the Jefferson network.
2. External Investigators must also obtain Duo to access the application from anywhere.
3. External Investigators must have a credit card for processing payment following their reservation.

## WHY ARE THERE DIFFERENT CHARGE CODES?

All charge codes are pulled from Jefferson's RACE (Research Administration Center of Excellence) table. If a code appears for you that means you are listed as a designee under that charge code/grant. If your department is associated with research charges the department charge code may appear also.

To remove yourself from a charge code listed, please contact the PI of that grant to have yourself removed.

If you are unsure who this grant belongs to, please put in a ServiceNow Ticket requesting the PI's information and to be removed from the grant.

RESEARCHERS - ENTERING A REQUEST TO RESERVE EQUIPMENT

Researchers can use EquipMe to request to reserve pieces of equipment on a specific day and time.

With a Jefferson campus key and password, and approved access to a grant you can log in to EquipMe and enter a request to reserve a piece of equipment.

If you are not an approved grant designee, you will not be able to enter a reservation request for yourself. Generally, approved designees include only faculty research professors. To become a designee, contact your Principal Investigator; see note below.

How to get my charge code to appear in EquipMe.

For all other questions please enter a ServiceNow Ticket.

1. Go to <https://jefferson.service-now.com/equipme> and enter your campus key and password.
2. Select **New Reservation**.



3. The *What are you reserving?* window appears. Complete all of the fields.

The screenshot shows a web form titled "What are you reserving?". It contains the following fields and controls:

- Reservation For:** A text input field with a person icon on the right.
- Equipment Type:** A dropdown menu with a downward arrow.
- Service:** A dropdown menu with a downward arrow.
- Are You A Jefferson Employee?:** Two buttons labeled "Yes" and "No".
- Reason For Request:** A text input field with a help icon (question mark in a circle).
- Next:** A rounded rectangular button at the bottom right.

**Reservation For** — enter the name or campus key of the person who this reservation request is for. This could be yourself or someone else.

**Equipment Type** — select the type of equipment that you want to reserve.

**Service**— select the specific service that you want to reserve.

**Charge Code** — select the charge code(s) where the equipment usage should be billed. If you select more than one charge code, you will be able to enter percentages to indicate how billing will be divided among charge codes.

If you believe that you should have access to use a charge code, but the charge code does not appear in EquipMe, please contact the grant's Principal Investigator and request to be added as an authorized designee. The Principal Investigator [can authorize designees using PeopleSoft](#).

[Further charge code instruction here:](#)

**Reason for Requesting** — enter a note that briefly summarizes the work that you will be performing with the equipment.

4. Select **Next**.

5. The **Consultation** screen appears. Answer **Yes** or **No**. Select **Next**.

**Consultation**

Have You Had A Consultation With The Lab About The Project?

Yes No

Back Next

6. If **No** is selected, answer the question below to precede next to complete a consult request with the facility.

**Consultation**

Have You Had A Consultation With The Lab About The Project?

Yes No

1. Are you a new/inexperienced or a trained/returning user?

Back Next

7. Confirm **Consultation Request** details.

## Consultation Request

This request is for  
**Emma Coath**  
exc446

### Details

Equipment Name \_\_\_\_\_ 3D Ultrasound Imaging

Reason for Request:  
test

1. Are you a new/inexperienced or a trained/returning user?  
test

8. If selected **Yes to previous consult**, you may be asked if you've had training. Answer **Yes** or **No**. Select **Next**.

## Consultation

Have You Had A Consultation With The Lab About The Project?

## Training

Have You Had This Training?

9. If selected **No to training**, fill out a time for training to proceed.

### Training

Training is a one-day event through the Xtrahl trainer.

### Location

1020 Locust St, Jefferson Alumni Hall, Room 442A

### When

Date  
Thursday, April 21, 2022

Start Time  
9:00am

End Time  
10:00am

[Back](#) [Next](#)

10. Confirm **Training Request**.

### Training Request

This request is for **Emma Coath**  
exc446

#### Details

Equipment Name \_\_\_\_\_ SARRP  
Location \_\_\_\_\_ 1020 Locust St, Jefferson Alumni Hall, Room 442A  
Date \_\_\_\_\_ Thursday, April 21, 2022  
Time \_\_\_\_\_ 9:00am - 10:00am  
Reason for Request:  
test

#### Billing

Training Fee	\$100.00
(100%)	\$100.00
<b>Total Estimate</b>	<b>\$100.00</b>

[Back](#) [Confirm](#)

11. If selected **Yes to consult and training**, you may proceed with reserving the equipment by selecting a date and time of service.

**Reserve Equipment**

Reservations must be requested at least one week prior to the imaging date. If you were instructed to do so during your consultation, please take food away from the animals 4 to 6 hours prior to imaging. Injection of non-radioactive agents must also be completed by the investigator prior to imaging.

On the next page, your billing summary will show the baseline charge of \$87.50 per animal. Additional charges will be added by the lab as discussed during your consultation. The cost structure for SAMI is as follows: PET or CT alone = \$87.50 per animal, PET & CT = \$175 per animal, Optical Imaging & X-Ray = \$62.50 per animal.

**Location**

1020 Locust St. JAH Room 474

**When**

Date  
Friday, April 22, 2022

Start Time  
11:00am

End Time  
2:00pm

Estimated Usage  
3

Ray = \$62.50 per animal.

12. Confirm equipment request

**Equipment Request**

This request is for  
**Emma Coath**  
exc-446

**Details**

Equipment Name \_\_\_\_\_ PET/CT  
Location \_\_\_\_\_ 1020 Locust St. JAH Room 474  
Date \_\_\_\_\_ Friday, April 22, 2022  
Time \_\_\_\_\_ 11:00am - 2:00pm  
Reason for Request:  
test

**Billing**

3 animal(s) x \$175.00	\$525.00
(100%)	\$525.00
<b>Total Estimate</b>	<b>\$525.00</b>

After submitting the reservation request, you will be sent the following automated emails:

**Confirmation email** — sent immediately after you submit the reservation request.

**Approval/Denying email** — sent to the facility manager for approving or denying the reservation request.

**Cancellation email** — sent only if someone cancels the reservation.

**No Show email** — sent only if researcher does not show up for their reservation.

**Activity Report email** — sent on the Friday evening after the reservation occurs, providing a billing invoice for your equipment usage. The email instructs you how to contact the facility manager if you do not agree with the charges.

**Pay Online email** — sent to external investigators after their reservation is completed and must pay invoice by credit card with 15 days

All of the automated emails listed above will be sent only to the user who submits the reservation request in EquipMe. For example, if you enter a reservation request on behalf of someone else, the automated emails will only be sent to you.




## RESEARCHERS - CANCELING A RESERVATION

When necessary, you can cancel equipment reservations that you have made.

Cancellations should be kept to a minimum and at least 24 hours before the reservation time. The number of cancellations that you make is tracked within EquipMe.

1. Go to <https://jefferson.service-now.com/equipme> and enter your campus key and password.
2. Go to Calendar
3. Select the reservation that you want to cancel
4. On the right side of the calendar, under details, select **Cancel Reservation**.

The screenshot displays the 'Details' tab of a reservation in the EquipMe system. It includes fields for Reservation Number (RES0001752), Equipment Name (PET/CT), Location (1020 Locust St. JAH Room 474), Date (Friday, April 22, 2022), and Time (11:00am - 2:00pm). The 'Reason for Request' field contains the text 'test'. The 'Status' section shows a yellow circle with a white horizontal line, indicating 'Reservation Pending', with the user 'Emma Coath (exc446)' and the timestamp '4/20/2022, 3:43pm'. At the bottom, there are two buttons: 'Cancel Reservation' (highlighted with a red box) and 'Contact Approver'.

Details	Facility	Billing
<b>Reservation Details</b>		
Reservation Number		RES0001752
Equipment Name		PET/CT
Location	1020 Locust St. JAH Room 474	
Date	Friday, April 22, 2022	
Time	11:00am - 2:00pm	
<b>Reason for Request</b>		
test		
<b>Status</b>		
 <b>Reservation Pending</b>		
Emma Coath (exc446)		
4/20/2022, 3:43pm		
<input type="button" value="Cancel Reservation"/> <input type="button" value="Contact Approver"/>		

You will be prompted to confirm that you want to cancel the reservation.

## PRINCIPAL INVESTIGATORS - AUTHORIZING A PURCHASING DESIGNEE

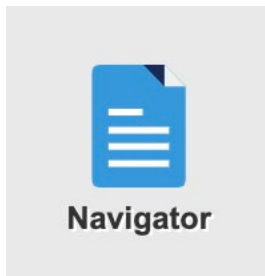
If you are a Principal Investigator and you would like to allow someone to perform research with different equipment under your Grant, you can authorize that person as a [purchasing designee in PeopleSoft](#).

The charge codes in EquipMe refresh nightly. It will take 24 hours for a newly authorized designee to be able to use the charge code after being added as a designee.

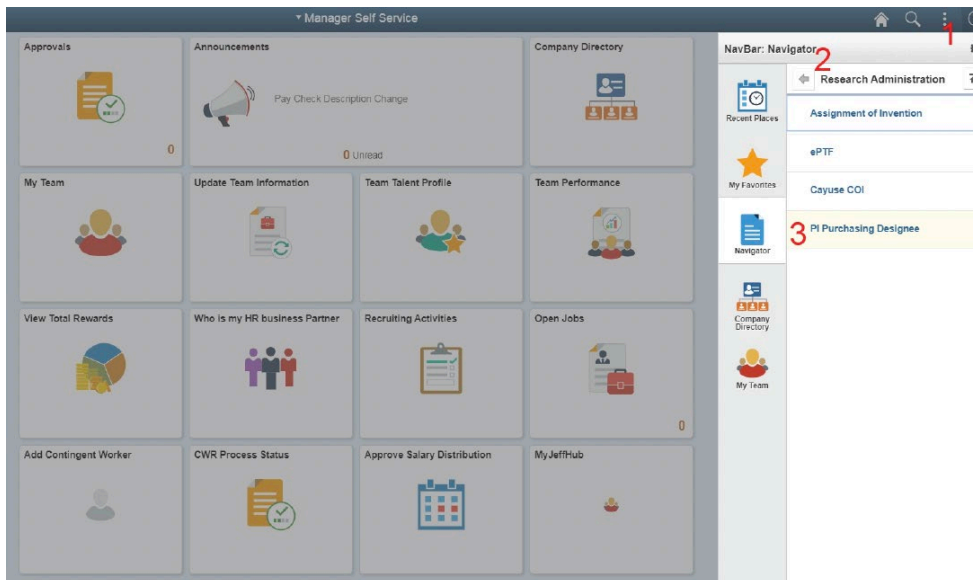
1. Go to [MyHR](#) and log in with your campus key.
2. Select the NavBar icon to open the navigation bar.



3. On the navigation bar, select Navigator.



4. Select Research Administration, then PI Purchasing Designee.



- The PI Purchasing Designee page opens. Next to the appropriate Product/Grant, select the **+** icon and find the person who you want to authorize to use that charge code.

PI Purchasing Designee

*I, the Principal Investigator for the above-referenced TJU Account Numbers, hereby authorize these purchasing designees to request orders on my behalf. Prior to requesting the order, as required, I will review and discuss the order requests with these Designees to ensure all orders adhere to all university, sponsor, and federal guidelines and regulations of the grant accounts that I am charging.*

*I am certifying that all purchases processed by my designees are allocable to the specific aims of each grant prior to ordering.*

Empl ID 000040780 Ryan Tomlinson Product  Refresh

Product N28601 Submission Number A19-0166-001 <b>Grants Title</b> Effect of Celecoxib and muMab911 on Stress Fracture Risk and Repair in Mice	Assigned To <input type="text" value="00092096"/> Name Nicholas Ruggiero Assigned To <input type="text" value="000930264"/> Name Bradley Snyder
Product S33401 Submission Number A19-0222-001 <b>Grants Title</b> NGF-TrkA Signaling in Dental Implant Osseointegration and Osseoperception	Assigned To <input type="text" value="000930264"/> Name Bradley Snyder
Product S33701 Submission Number A19-0237-001 <b>Grants Title</b> NGF-TrkA Signaling in Load-Induced Bone Formation	Assigned To <input type="text" value="000930264"/> Name Bradley Snyder
Product U12901 Submission Number A18-0053-001 <b>Grants Title</b> The Role of NSAIDs in Osseointegration of Dental Implants	Assigned To <input type="text" value="000930264"/> Name Bradley Snyder

## FACILITY MANAGERS – ADJUSTING A RESERVATION’S BILLING INFORMATION

When necessary, you can manually adjust the number of hours to be billed or add on an extra charge to any individual reservation.

You can adjust the invoice on pending, approved and completed reservations. For your reservations to be billed accurately, ALL CHANGES must be made by the last day of the calendar month that the reservation occurred.

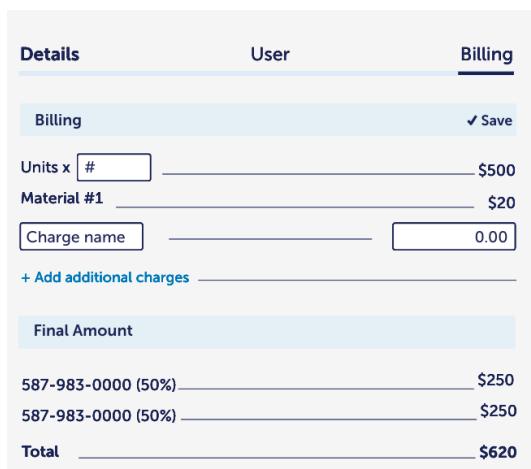
1. Go to <https://jefferson.service-now.com/equipme> and enter your campus key and password.
2. Click on your initials in upper-right corner of the app and select **Switch to Facility View**.
3. On the left side of the app, select the reservation that you want to adjust the billing for. You can use either the **Calendar** view or **List** view to find the reservation.
4. Open the **Billing** page on the right side of the app and select the **Pencil** icon.



The screenshot shows the 'Billing' page in the app. At the top, there are three tabs: 'Details', 'User', and 'Billing'. The 'Billing' tab is selected and highlighted in blue. Below the tabs, there is a 'Billing' section with a pencil icon. The main content area shows a table with the following items:

Final Amount	
587-983-0000 (50%)	\$250
587-983-0000 (50%)	\$250
<b>Total</b>	<b>\$620</b>

5. You can change the number of hours that the equipment was used or select **Add Additional Charge** to add on a charge.



The screenshot shows the 'Billing' page in the app, with the 'Billing' tab selected. The 'Billing' section is highlighted in blue and contains a 'Save' button. Below this, there are input fields for 'Units x #', 'Material #1', and 'Charge name'. The 'Charge name' field is currently empty, and the 'Charge amount' field is set to '0.00'. There is a '+ Add additional charges' link below the input fields. The main content area shows the same table as in the previous screenshot:

Final Amount	
587-983-0000 (50%)	\$250
587-983-0000 (50%)	\$250
<b>Total</b>	<b>\$620</b>

6. Select **Save** when finished

## FACILITY MANAGERS – APPROVING/DENYING RESERVATION REQUESTS INDIVIDUALLY

When approving and denying reservation requests, you can select the reservation on the calendar to view detailed information about each request such as the researcher's reason for the request and the duration of the reservation.

If you would prefer to quickly approve or deny multiple requests at once, refer to [Facility Managers - Approving/Denying Reservation Requests - Quick Method](#).

1. Go to <https://jefferson.service-now.com/equipme> and enter your campus key and password.
2. Click on your initials in upper-right corner and select **Switch to Facility View**.
3. You may view reservations on the **calendar** or **list** view. Toggle between Calendar and list by clicking the “Calendar” button at the top of the page.

### Calendar

The screenshot shows the EquipMe interface in calendar view for Wednesday, April 20, 2022. The calendar grid displays reservation requests for the day. A filter sidebar on the left allows users to filter by status (All, Pending, Upcoming, Past) and includes a search for users. A legend on the left identifies reservation statuses: Completed (blue), Approved (green), Submit Invoice (purple), Pending (orange), Canceled (red), Blocked Time (grey), and No Show (pink). The calendar shows several requests, including a pending request for 'A. Vitrobot & Clippi...' on Wednesday at 9:30am-11:30am, and a completed request for 'SARRP' on Thursday at 11:00am-2:00pm.

### List


The screenshot shows the EquipMe interface in list view. The list displays reservation requests with columns for STATUS, EQUIPMENT, and USER. The status column indicates the request's current state, such as PENDING (orange) or COMPLETED (blue). The equipment column lists the reservation type, and the user column shows the researcher's name and ID. The list view also includes the same filter sidebar and legend as the calendar view.

STATUS	EQUIPMENT	USER
PENDING	Virus Neutralization Assay	Nicole Herbat (nh073)
INVOICE SUBMIS...	SARRP	Emma Coath (exo448)
INVOICE SUBMIS...	PET/CT	Emma Coath (exo448)
INVOICE SUBMIS...	PET Alone	Emma Coath (exo448)
PENDING	3D Ultrasound Imaging	Emma Coath (exo448)
INVOICE SUBMIS...	CT Alone	Emma Coath (exo448)

4. Select a pending request to approve or deny. Pending requests appear orange.

Before deciding to approve or deny the request, you can see more detailed information about the request by selecting the details tab. The **Details** page shows the **request reason** that was entered by the researcher, the **User** page shows the researcher's history, including the number of cancelled and no-show reservations, and the **Billing** page shows the duration of the reservation request.

5. Open the **Details** tab on the right side of the page. Then, select either **Deny Reservation** or **Approve Reservation** as appropriate.

<b>Details</b>	<b>User</b>	<b>Billing</b>
<b>Reservation Details</b>		
Equipment Name	CryoEM	
Location	1223 Chestnut St. Philadelphia, PA 19123	
Date	Thursday, August 10, 2020	
Time	12:00 PM - 2:00 PM	
<b>Reason for Request</b>		
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec dolor sit toy amet id lacuss ege onsectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec dolor sit toy amet id lacuss ege onsectetur adipiscing.		
<b>Approval Status</b>		
	<b>Reservation Pending</b> Victoria Gulick (vav004) Mar 3, 2:37pm	
<input type="button" value="Deny Reservation"/>	<input type="button" value="Approve Reservation"/>	

6. If you chose to deny the reservation, you will be prompted to confirm your choice.

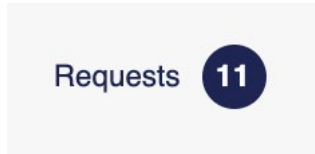
The user who requested the reservation will automatically be sent an email notification stating whether the reservation was approved or denied.

## FACILITY MANAGERS – APPROVING/DENYING RESERVATION REQUESTS QUICK METHOD

You can quickly approve or deny multiple requests at once.

If you would like to see more detailed information about each request when approving/denying, refer to [Facility Managers - Approving/Denying Reservation Requests Individually](#).

1. Go to <https://jefferson.service-now.com/equipme> and enter your campus key and password.
2. Click on your initials in the upper-right corner of the app and select **Switch to Facility View**.
3. Click on the total number of pending requests in the upper-right corner of the app.



4. A reservation requests window opens, listing all of your pending reservation requests.
5. Select one or more requests, then select either **Approve** or **Deny** as appropriate.



## FACILITY MANAGERS – CANCELING AN APPROVED RESERVATION

You can cancel reservations at any time. For example, if you approved a reservation but later realize that your internal team needs to use the equipment during that time, you can cancel the reservation that you already approved. A notification will be sent to the researcher letting them know there was a cancellation. They can make a new reservation at any time.

1. Go to <https://jefferson.service-now.com/equipme> and enter your campus key and password.
2. Click on your initials in upper-right corner and select **Switch to Facility View**.
3. On the right side of the app, select the approved reservation that you want to cancel. You can use either the **Calendar** view or **List** view to find the reservation.
4. Select the details tab on the right side of the screen. Then select **Cancel Reservation**.

The screenshot shows a mobile application interface for managing reservations. At the top, there are three tabs: 'Details' (selected), 'User', and 'Billing'. Below the tabs, there are three sections: 'Reservation Details', 'Reason for Request', and 'Approval Status'. The 'Reservation Details' section includes fields for Equipment Name (CryoEM), Location (1223 Chestnut St. Philadelphia, PA 19123), Date (Thursday, August 10, 2020), and Time (12:00 PM - 2:00 PM). The 'Reason for Request' section contains placeholder text. The 'Approval Status' section shows a green checkmark icon and the text 'Reservation Approved' by Victoria Gulick (vav004) on Mar 3, 2:37pm. At the bottom, there are two buttons: 'Cancel Reservation' (highlighted with a red box) and 'Mark No Show'.

5. You will be prompted to confirm that you want to cancel the reservation.
6. Enter the reason for cancellation and select Send. The message that you enter will be included in an automated email that is sent to the researcher who made the reservation.

The screenshot shows a confirmation dialog box with a close button (X) in the top right corner. The title is 'Reason for canceling.' Below the title is a text input field containing the text 'The equipment is scheduled for a repair at this time.' At the bottom of the dialog, there are two buttons: 'Cancel' and 'Send' (highlighted with a dark blue background).



## FACILITY MANAGERS – HOW MANY PENDING RESERVATION REQUESTS DO I HAVE?

It's easy to check how many pending reservation requests you have. You need to either approve or deny each request.

1. Go to <https://jefferson.service-now.com/equipme> and enter your campus key and password.
2. The total number of outstanding reservation requests that you need to either approve or deny is shown in the upper-right corner of the app

The screenshot displays the EquipMe application interface. At the top, the 'My Facility' section is active, showing a navigation bar with 'Calendar', 'Reports', 'Equipment', and 'Facility'. A notification in the top right corner indicates 'Requests 17', with a red box and arrow pointing to it. The main area shows a calendar for Wednesday, April 20, 2022, with a time slot from 8:00 to 2:00. The calendar contains several reservation requests with status indicators: 'PENDING' (A. Vitrobot & Clippi...), 'COMPLETED' (SARRP), and 'PENDING' (PET/CT). A 'Nothing selected!' message is displayed on the right side of the calendar.

## FACILITY MANAGERS – REPORTING A RESERVATION AS A NO SHOW

If a researcher does not show up to his or her approved reservation, you should mark the reservation as a **No Show**.

Each researcher's running sum of No-Show appointments and self-cancelled reservations is tracked in EquipMe. This number is visible to facility managers when approving or denying reservation requests made by that user.

1. Go to <https://jefferson.service-now.com/equipme> and enter your campus key and password.
2. Click on your initials in the upper-right corner of the app and select **Switch to Facility View**.
3. On the right side of the app, select the approved reservation that you want to mark as No Show. You can use either the **Calendar** view or **List** view to find the reservation.
4. Open the **Details** tab, then select **Mark No Show**.

**Only reservations in the Approved status can be marked as No Show. Approved reservations appear green.**

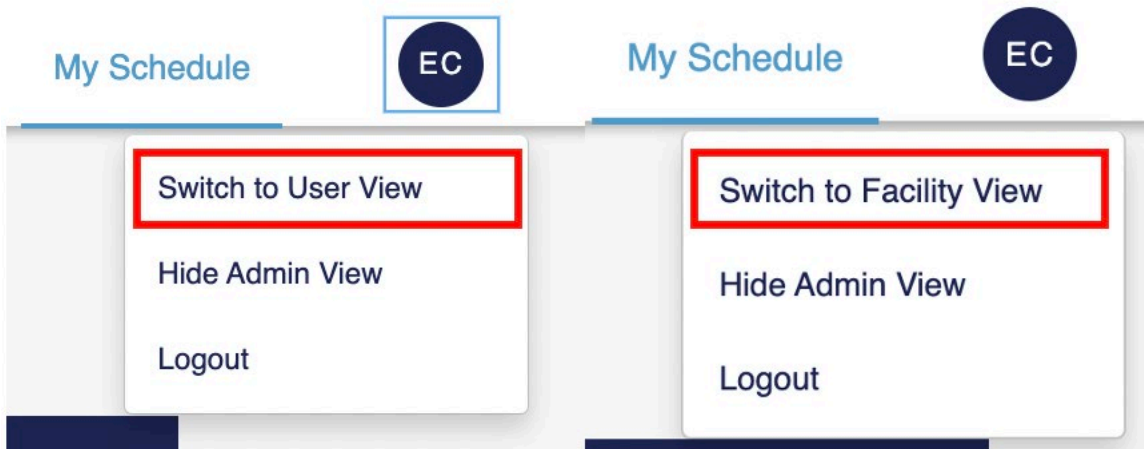
The screenshot shows the 'Details' tab of a reservation. At the top, there are tabs for 'Details', 'User', and 'Billing'. Below this is a 'Reservation Details' section with fields for Equipment Name (CryoEM), Location (1223 Chestnut St. Philadelphia, PA 19123), Date (Thursday, August 10, 2020), and Time (12:00 PM - 2:00 PM). A 'Reason for Request' section contains placeholder text. The 'Approval Status' section shows a green checkmark icon and the text 'Reservation Approved' by Victoria Gulick (vav004) on Mar 3, 2:37pm. At the bottom, there are two buttons: 'Cancel Reservation' and 'Mark No Show', with the latter highlighted by a red box.

If you accidentally mark a reservation as **No Show**, you can set it back to Approved status by simply selecting **Approve Reservation** on the Approval page.

The screenshot shows the 'Details' tab of a reservation. At the top, there are tabs for 'Details', 'User', and 'Billing'. Below this is a 'Reservation Details' section with fields for Equipment Name (CryoEM), Location (1223 Chestnut St. Philadelphia, PA 19123), Date (Thursday, August 10, 2020), and Time (12:00 PM - 2:00 PM). A 'Reason for Request' section contains placeholder text. The 'Approval Status' section shows a purple 'X' icon and the text 'Reservation No Show' by Victoria Gulick (vav004) on Mar 3, 2:37pm. At the bottom, there are two buttons: 'Cancel Reservation' and 'Approve Reservation', with the latter highlighted by a red box.

## FACILITY MANAGERS – HOW TO ENTER RESERVATION REQUESTS TO USE EQUIPMENT AT OTHER FACILITIES?

To accommodate this, EquipMe has two views: the Facility View and the User View. To change the view, click on your initials in the upper-right corner and select **Switch to User/Facility View**.



## FACILITY MANAGERS – HOW TO EDIT MY EQUIPMENT?

1. Sign into your EquipMe account and click on **Equipment**

The screenshot shows the 'My Facility' dashboard in the EquipMe application. At the top, there are navigation links for 'New Reservation', 'Block Time', 'Calendar', 'Reports', 'Equipment' (highlighted with a red box), and 'Facility'. A filter sidebar on the left includes options for 'All', 'Pending', 'Upcoming', and 'Past', along with a 'Find User' search bar. The main area displays a calendar grid for Thursday, March 03, 2022, with time slots from 8:00 to 9:00.

2. Click on your Equipment

The screenshot shows the 'Equipments' list in the EquipMe application. The table contains the following data:

Equipment Name	Facility Name	Department	Schedule	Number of Resources	Updated	Created
C. PROOF-OF-CONCEPT PILOT EXPERIMENT	Cryo-EM	BIOCHEMISTRY	9AM - 5PM MON-FRI	1	2021-10-07 09:18:15	2021-10-06 20:01:08
B. 200 kV Glacios	Cryo-EM	BIOCHEMISTRY	8AM - 5PM MON-SUN	1	2022-01-31 14:28:57	2021-03-26 12:50:12
Viral Load Assay	BSL3	Microbiology & Immunology	9AM - 6PM MON-FRI	1	2022-02-25 16:18:31	2021-12-02 13:18:41
Protocol B x Rat	High-Frequency Ultrasound	Center for Translational Medicine	9AM - 6PM MON-FRI	1	2022-03-08 10:03:48	2022-03-08 02:08:08
SARRP	Small Animal Radiation Research Platform	Radiation Oncology	9AM - 5PM MON-FRI	1	2021-11-16 14:51:50	2021-08-13 10:38:27
Liquid Chromatography-Mass Spectrometry	Metabolomics	Center for Translational Medicine	8AM - 5PM MON-FRI	1	2021-10-19 11:17:12	2021-03-31 10:55:15
Training	BSL3	Microbiology & Immunology	9AM - 6PM MON-FRI	1	2022-02-23 13:16:59	2022-01-19 16:08:47
Flex 2	Flexstation	Center for Translational Medicine	8AM - 5PM MON-SUN	1	2021-08-26 13:57:03	2019-12-17 09:05:22
PET/CT	SAMI	Radiology	8AM - 5PM MON-FRI	1	2021-11-03 20:41:43	2021-03-31 10:55:15
Int. Microscopy (EV) PDP	SAMI	Radiology	8AM - 6PM MON-FRI	1	2021-10-26	2021-10-26

3. Edit your Equipment information and remember to click **Save**

## FACILITY MANAGERS – HOW TO ADD A NEW EQUIPMENT?

1. Sign into your EquipMe account and click on **Equipment**

The screenshot shows the EquipMe dashboard for a facility manager. At the top left is the Jefferson logo. The main header includes 'EquipMe', 'My Schedule', and a user profile icon labeled 'EC'. Below the header, the 'My Facility' section contains navigation buttons: 'New Reservation', 'Block Time', 'Calendar', 'Reports', 'Equipment' (highlighted with a red box), and 'Facility'. A filter sidebar on the left allows selection of reservation status: All (selected), Pending, Upcoming, and Past. The main area displays a calendar for Thursday, March 03, 2022, with a grid showing time slots from 8:00 to 9:00 across the days of the week.

2. Click on **New**

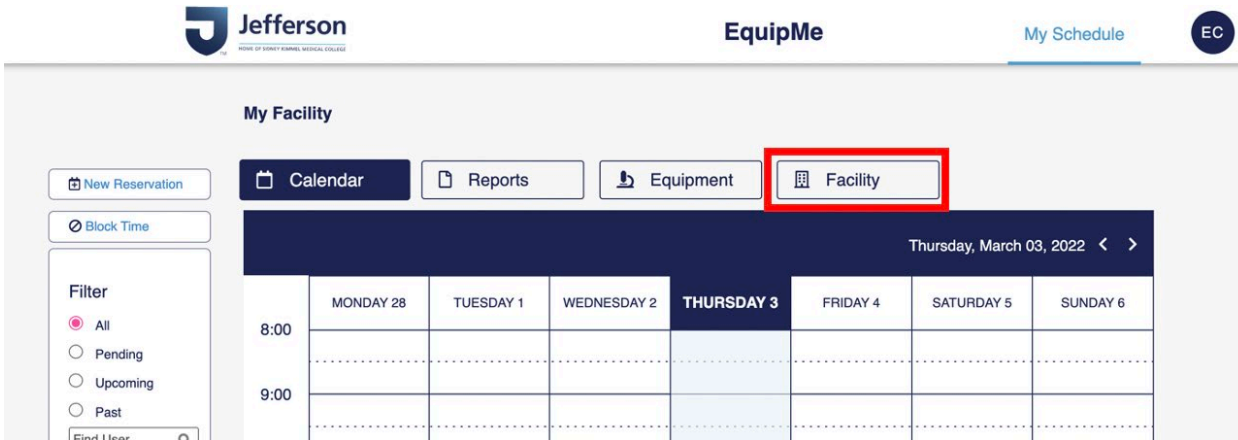
The screenshot shows the 'Equipments' list in the EquipMe interface. The 'New' button is highlighted with a red box. The table below lists various pieces of equipment with their details.

Equipment Name	Facility Name	Department	Schedule	Number of Resources	Updated	Created
C. PROOF-OF-CONCEPT PILOT EXPERIMENT	Cryo-EM	BIOCHEMISTRY	9AM - 5PM MON-FRI	1	2021-10-07 09:18:15	2021-10-06 20:01:08
B. 200 kV Glacios	Cryo-EM	BIOCHEMISTRY	8AM - 5PM MON-SUN	1	2022-01-31 14:28:57	2021-03-26 12:50:12
Viral Load Assay	BSL3	Microbiology & Immunology	9AM - 6PM MON-FRI	1	2022-02-25 16:18:31	2021-12-02 13:18:41
Protocol B x Rat	High-Frequency Ultrasound	Center for Translational Medicine	9AM - 6PM MON-FRI	1	2022-03-08 10:03:48	2022-03-08 02:08:08
SARRP	Small Animal Radiation Research Platform	Radiation Oncology	9AM - 5PM MON-FRI	1	2021-11-16 14:51:50	2021-08-13 10:38:27
Liquid Chromatography-Mass Spectrometry	Metabolomics	Center for Translational Medicine	8AM - 5PM MON-FRI	1	2021-10-19 11:17:12	2021-03-31 10:55:15
Training	BSL3	Microbiology & Immunology	9AM - 6PM MON-FRI	1	2022-02-23 13:16:59	2022-01-19 10:08:47
Flex 2	Flexstation	Center for Translational Medicine	8AM - 5PM MON-SUN	1	2021-08-26 13:57:03	2019-12-17 09:05:22
PET/CT	SAMI	Radiology	8AM - 5PM MON-FRI	1	2021-11-03 20:41:43	2021-03-31 10:55:15
In-Vivo MFC FX PRO	SAMI	Radiology	8AM - 5PM MON-FRI	1	2021-10-26	2021-10-01

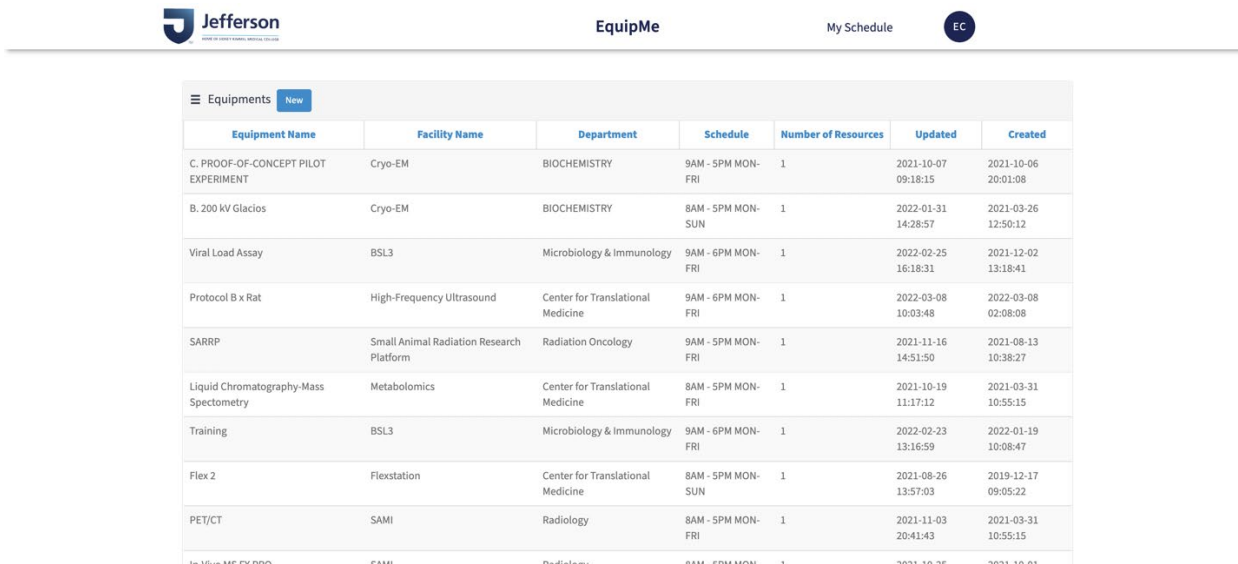
3. Edit your Equipment information and remember to click **Save**

# FACILITY MANAGERS – HOW TO EDIT MY FACILITY?

1. Sign into your EquipMe account and click on **Facility**



2. Click on your Facility to edit



3. Edit your Facility information and remember to click **Save**

# FACILITY MANAGERS - CAN I MAKE A NEW FACILITY?

No, please submit a ServiceNow ticket requesting a new facility and direct to the ServiceNow team.

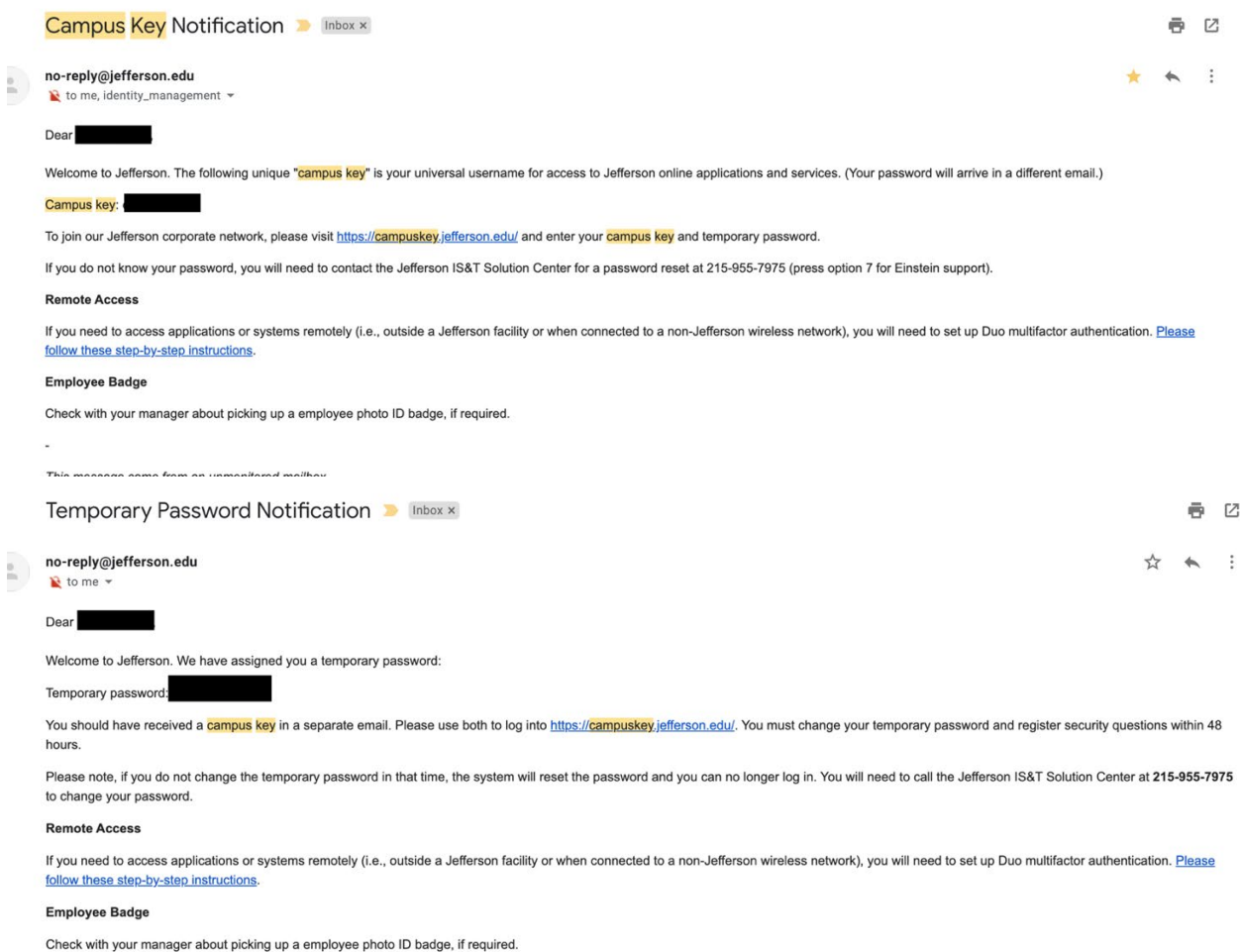
## EXTERNAL INVESTIGATORS- HOW DO I GET A CAMPUS KEY?

As an external partner you will need to receive a 1) **Campus key and password** then set up 2) **multi-form authentication** (the Duo app) to access our EquipMe reservation system. This is a one-time requirement.

1. To obtain a Campus Key: please Email Philip Berg ([Philip.berg@jefferson.edu](mailto:Philip.berg@jefferson.edu)) and request a Campus Key for Research Use. In the email provide:

- **Full Name**
- **Date of birth**
- **Email address (Will be used to receive campus key, invoices and submit payment)**
- **Cell Phone number (Will be used for multi-form authentication)**
- **Which Equipment you would like to reserve**

Once a campus key is created, you will receive an email with your **new campus key** and **temporary password**.



Go to <https://campuskey.jefferson.edu> On your first sign in, it will ask you to create your own password.

2. Next set up Duo (Dual Authentication). This is the final step to accessing our reservation system (EquipMe).

On your first login to <https://jefferson.service-now.com/equipme> It will prompt you to set up Duo. Download the app on your phone and follow the prompts to complete setup.

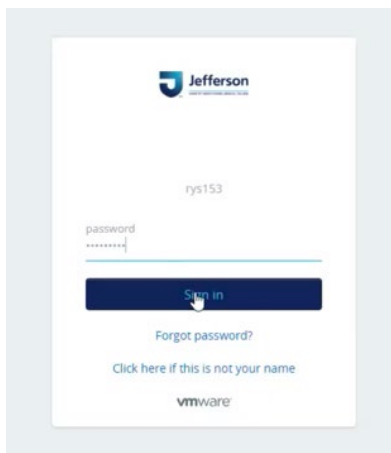
3. When Duo setup is complete you can login and make a reservation in EquipMe

# Duo Multifactor Authentication Setup

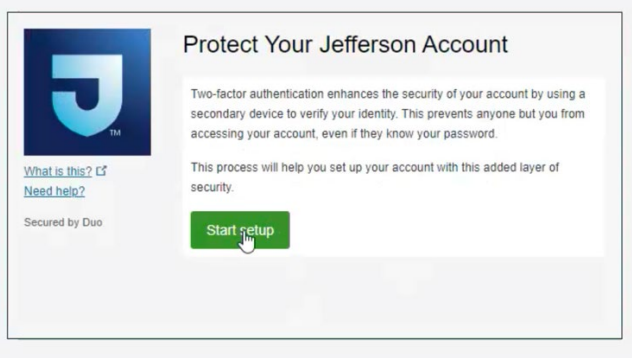
These instructions are for individuals who have already have a campus key.

The Duo mobile app can be used on any device running iOS 12/Android 8 or greater. If your device is not running one of the supported OS types, you still have the capability of using the **Call Me** and **Passcode** authentication methods of Duo with a capable mobile device or landline.

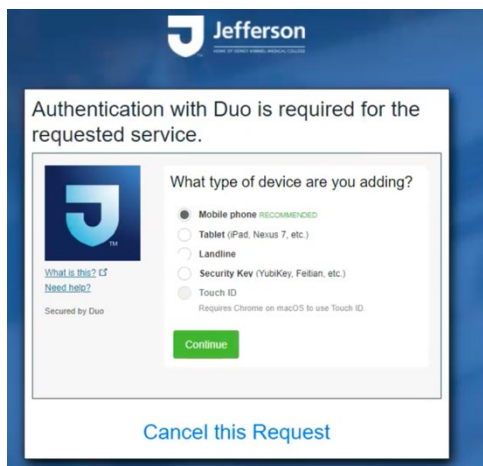
1. Go to <https://jefferson.service-now.com/equipme>
2. Enter your campus key and password



3. You will be prompted to Set-up Two factor authentication with Duo

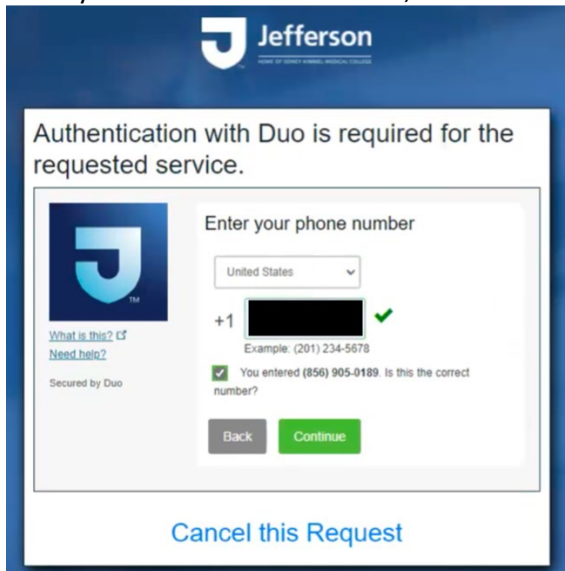


4. Select the Mobile option as your second form Authentication

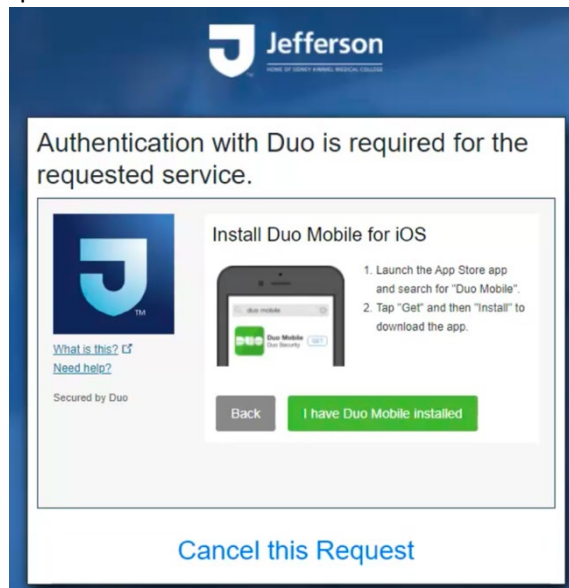
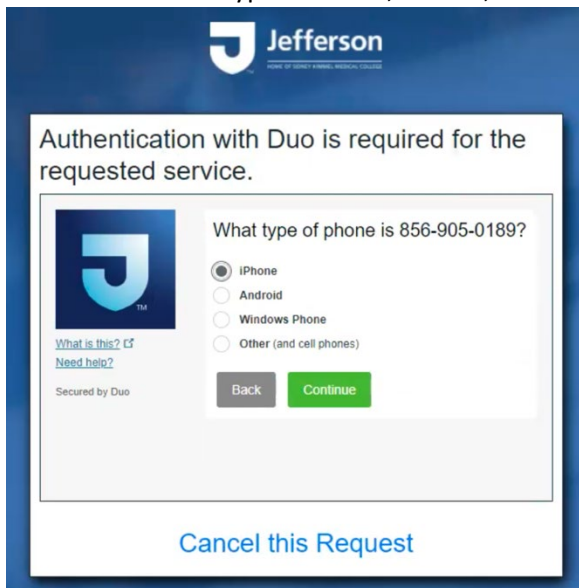




5. Enter your mobile Phone number, confirm it is correct.

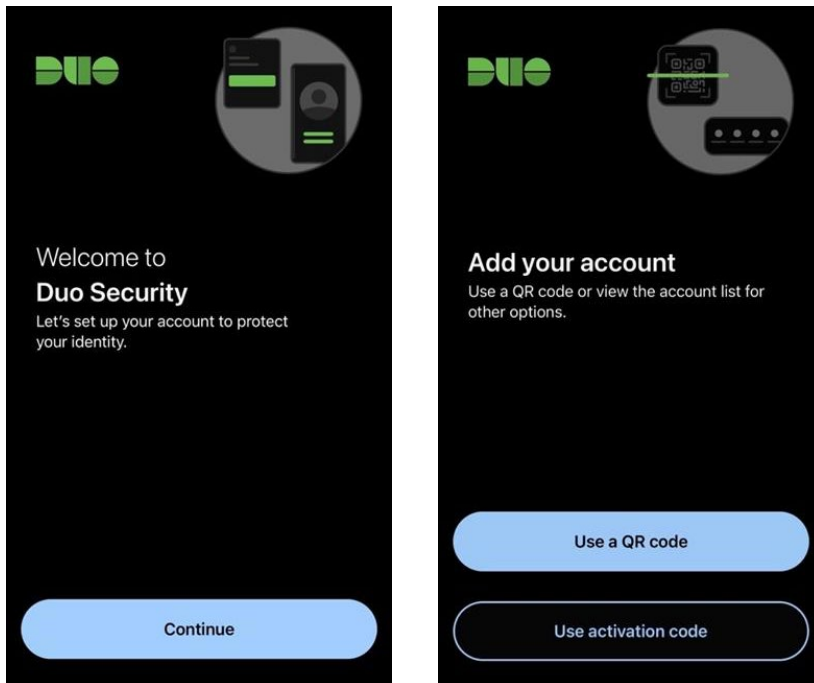


6. Select the Phone Type: Android, iPhone, Windows phone

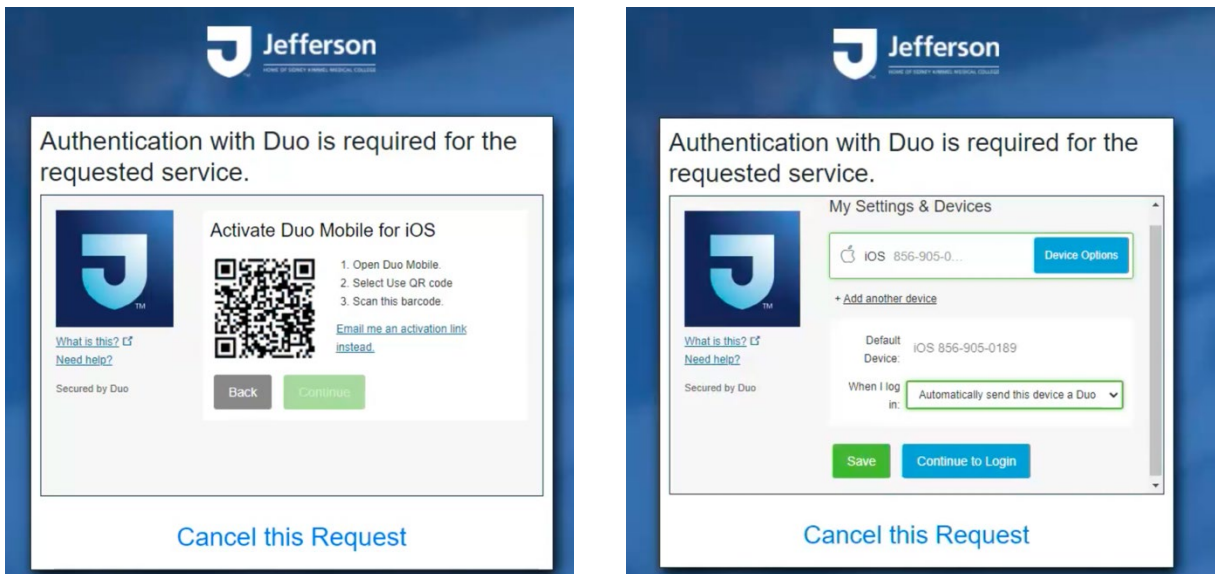


7. You will be prompted to download the Duo Mobile App on your Phone.
8. On your iPhone or Android, follow the download prompts. When you have downloaded select, "I have Duo Installed".

9. Select "Scan QR code" on the mobile view.



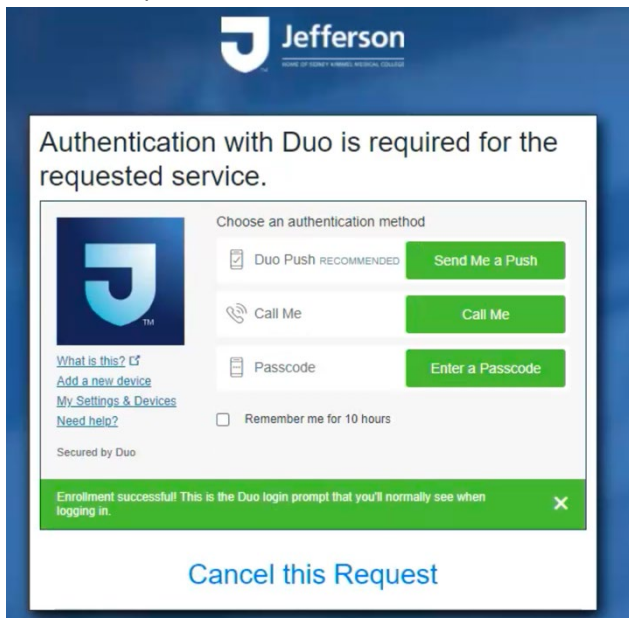
10. Use your iPhone or android to scan the QR code on your computer screen  
a. Select, "Automatically send this device a Duo Push"



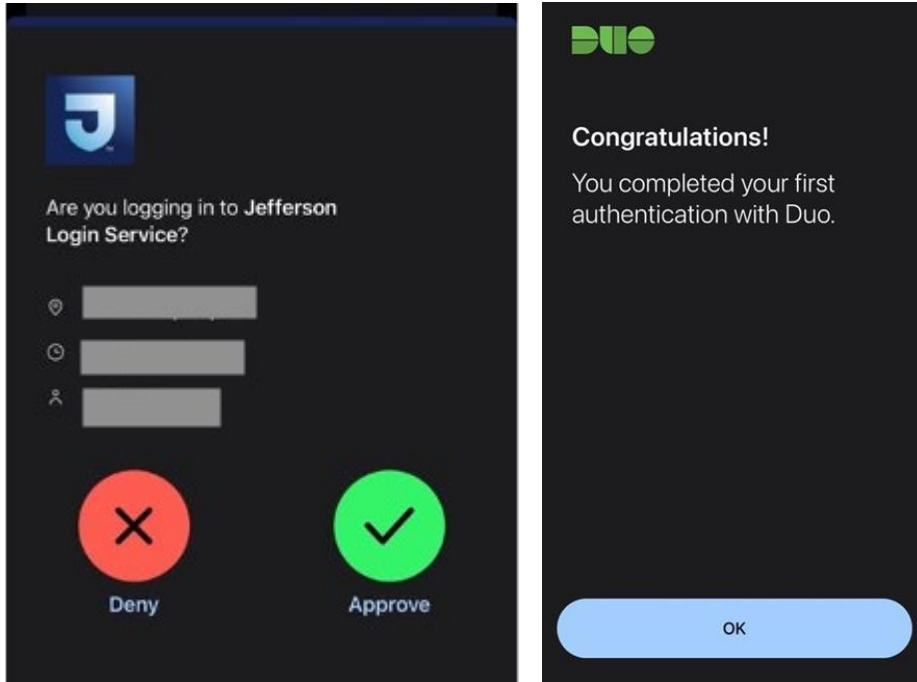
11. The Jefferson Account will appear, Hit “save”



12. On the computer screen select “Send me a Push”



13. The Duo App will prompt you to approve the push, verifying your identity



If you have questions, please call the IS&T Solution Center at 215-955-7975 .

## EXTERNAL INVESTIGATORS- HOW DO I RESET MY PASSWORD?

If you have forgotten your Campus Key password and need to reset, a video conference is required to verify your identity. Contact the IS&T Solution Center to set up your video conference meeting. Call the IS&T Solution Center at 215-955-7975.

You can use Teams video, Zoom, or Facetime for video verification if you are unable to use Rescue Lens. Please share your photo ID and face during your call.

If using Rescue Lens



1. Download Rescue Lens from the Google Play Store or the Apple App Store on their mobile device
  2. Click OK to allow access to camera
  3. Retrieve PIN Code from IS&T Solution Center and click Connect
  4. Show face and photo identification card
  5. If the photo identification card matches the customer, the customer can be considered verified
- To reset password go to <https://campuskey.jefferson.edu/itim/ui/Login.jsp>

Enter the 14 digit password

Then enter 4 security questions

