

# **BADGER LMS**

# **USER MANUAL**

Version 1.8 02 Jan 2020

# **VERSION HISTORY**

Version #	Changed By	Revision Date	Changes
1.0	Basil Chew	12 Feb 2015	Initial release
1.1	Basil Chew	9 April 2015	2.1 Changed Emergency Crisis Management to Emergency Incident Preparedness
1.2	Basil Chew	11 May 2015	2.2 Update new link for Badger download
1.3	Basil Chew	2 Dec 2015	2.1 Update links to safety webpages
1.4	Basil Chew	3 Jan 2016	Annual review 10.1 refine procedures for deleting Java cache
1.5	Basil Chew	3 Jan 2017	Annual review 2.1 Update links to Core Labs webpage 3.1 Reminder to logout 3.2 Check junk mail folder if new password is not received 4.5.1 Dual mode instruments
1.6	Basil Chew, Yingchun Zhao	3 Jan 2018	Annual review Add acronyms table 2.1 change PI Approval to RFS system from pre-approval form 3.1 remove requirement for lowercase email address 4.2 add new multi-day reservations feature 4.4 automatic cancellation of no-show reservations 10.2 replace preapproval form with RFS
1.7	Basil Chew, Yingchun Zhao	3 Jan 2019	Annual review 2.2 add emphasis on Badger version 2.3 add pocket ID requirement for registration 3.2 update some screenshots 4.0 add Badger MicroServices
1.8	Basil Chew, Yingchun Zhao	2 Jan 2020	Annual review Table of contents-update 2.1 change "checklist" to "procedures", updated 2.2 installing Badger-update the hyperlink 4 Badger Microservices-add the QR code, delete one note 5.7.1 Dual modes-delete 5.8 disabling a device-add one note

# **ACRONYMS**

Acronym	Definition
CLC	Core Labs Charging
LMS	Lab Management System
PI	Principal Investigator
RFS	Request for Service

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# INTRODUCTION

#### 1.1 BADGER

Badger is a Lab Management System used in the Core Labs to handle reservations and equipment access. Features include:

- A uniform online instrument booking system, accessible by registered KAUST users. One system to address the needs of all Core Labs.
- Charging capability for tracking costs incurred by individual users and groups.
- Allows trained users to book and reserve time to use instruments and prevent unauthorized access.
- Transparent booking calendar to allow users to view when instruments are available.
- Audit trail functionality for tracing user activity on interfaced instruments.
- On demand reporting facility e. g. Instrument Utilization Report, Charging Report.

# 2 REGISTRATION PROCESS FOR NEW USERS

#### 2.1 PROCEDURES

# 2.1.1 Access for full service only

Users who require only Full Service via the RFS (Request for Service) portal need to complete procedures no. ① & ③ below

# 2.1.2 Access for Training, Independent Use

Users who require trainings and to be independent users, need to complete procedures no. ①-④below.

# ① Submit a one-time PI-Approval on RFS Portal <a href="https://corelabsrfs.kaust.edu.sa">https://corelabsrfs.kaust.edu.sa</a>

- For KAUST internal users, please log in with KAUST IT credentials and submit a one-time request for PI-Approval.
- For KAUST Research and Technology Park users, please register as a KAUST Research Park Tenant user (check box), then log in and submit a request for PI Approval.
- For external users, please contact <u>CoreLabs.Services@KAUST.EDU.SA</u> for more information.

Note: Please do not use Internet Explorer

# 2 Lab Safety Training

As per the KAUST Lab Safety Manual, all users of KAUST laboratories must pass the following trainings:

- Laboratory Safety Training
- Hazardous Waste Training
- Emergency Incident Preparedness Training

OR

- Combined Lab Safety Orientation Note:
- These trainings can be self-enrolled through Bioraft: <a href="https://kaust.bioraft.com/raft/training/courses">https://kaust.bioraft.com/raft/training/courses</a>
- If you do not have a KAUST portal account, the required trainings can be completed here:
  - https://hse.kaust.edu.sa/training/Pages/RS VisitorTraining.aspx
- Once the certificates are received, please forward your certificates to clc@kaust.edu.sa.
- If you need a copy of your certificates please request from researchsafety@kaust.edu.sa

# 3Badger Registration https://corelabs.kaust.edu.sa/services/badger

Download the Badger software on your own (user's) computer or use the clientside on any computer and register as a new member.

Note:

 If you do not know the exact pocket ID that your PI will assign to you, please enter any number during registration; we will correct it based on your PI approval.

# ④To become a qualified user for a specific tool/instrument (Independent User)

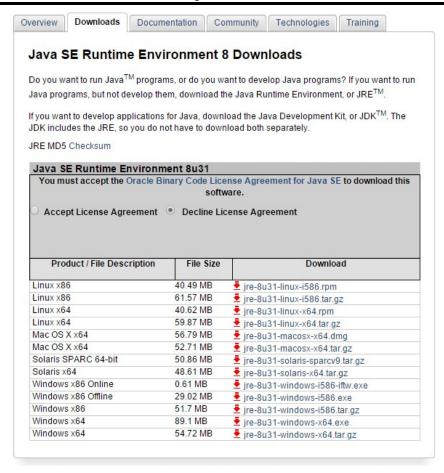
You will need to be trained and qualified on the tool for independent use. Please contact the relevant labs/tool owners directly to arrange for training.

# Additional requirement for cleanroom access:

Please follow the link to book an available date for the 'Cleanroom Safety Training' <a href="https://docs.google.com/forms/d/e/1FAlpQLSfAmNyMvzL7a6oxlgdnSrKBduBQBOoxxCXpv4tEh9dIrse56Q/viewform?formkey=dHJNRzZSRXZqWUZXVDVhTXNHd0c0bFE6MA#gid=0">https://docs.google.com/forms/d/e/1FAlpQLSfAmNyMvzL7a6oxlgdnSrKBduBQBOoxxCXpv4tEh9dIrse56Q/viewform?formkey=dHJNRzZSRXZqWUZXVDVhTXNHd0c0bFE6MA#gid=0</a>

#### 2.2 INSTALLING BADGER

 The Badger LMS software requires Java Runtime Environment (JRE) from Oracle-Sun. Please download and install the appropriate <u>file</u> for your operating system (normally Windows x64 \*.exe or Mac OS X x64 \*.dmg).

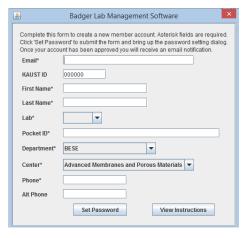


- Instructions for installation can be found here.
- If you have problems installing Java please contact IT Helpdesk.
- Download and install the Badger LMS software <u>here</u>.
   Make sure to download and install Core labs Badger LMS software as different versions are used in KAUST.

#### 2.3 CREATING AN ACCOUNT

- Launch the Badger LMS software
- Click on the New Member? Button





- Fill in the required fields. For help click on the **View Instructions** button.
- Your email address must be in lowercase only.

- If you don't know the **Pocket ID**, enter any number for registration; it will be corrected based on your PI approval.
- Once completed, submit the form by selecting Set Password. Any field which is in error will be shown in red and should be corrected. Once a password has been set the application moves to the review process. You will receive an email once the account has been approved.

# 3 LOGGING IN TO BADGER

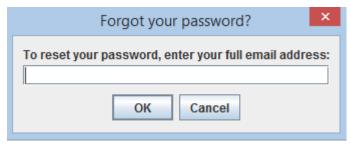
#### 3.1 EMAIL AND PASSWORD

- When logging in KAUST members do not need to enter the domain '@kaust.edu.sa' all others must enter the entire email address.
- Do not leave your session open as other users may use your account and accrue charges. It is your responsibility to logout as soon as you have finished your transaction.

#### 3.2 LOST PASSWORD

 Staff do not have access to existing passwords. You need to request the system to reset your password and email you a randomly assigned one. Click on the **Lost Password** button on the login screen.



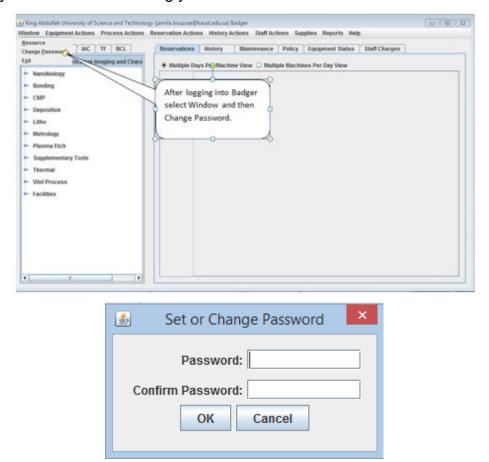


- Your email address must be the same one that you used to register with Badger.
- Check your junk mail folder if you do not receive the new password.
- When receiving the following error message, you also can click on the Lost Password button.



## 3.3 CHANGING YOUR PASSWORD

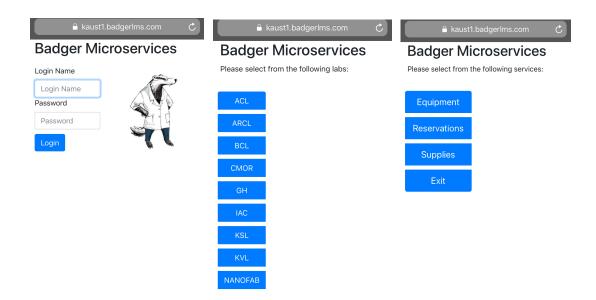
 After logging in with your temporary password it is strongly recommended you reset it to something you will remember.



# 4 BADGER MICROSERVICES

- Badger MicroServices is a simplified version of Badger designed to run on mobile devices through a browser.
- To access Badger MicroServices please bookmark the following link to your mobile browser:
  - https://kaust1.badgerlms.com:8443/WebServices/mbadger
- Or scan the QR code below to access Badger MicroServices.

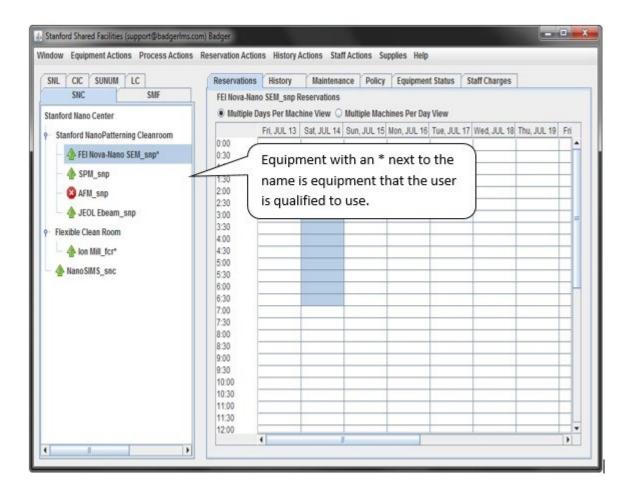


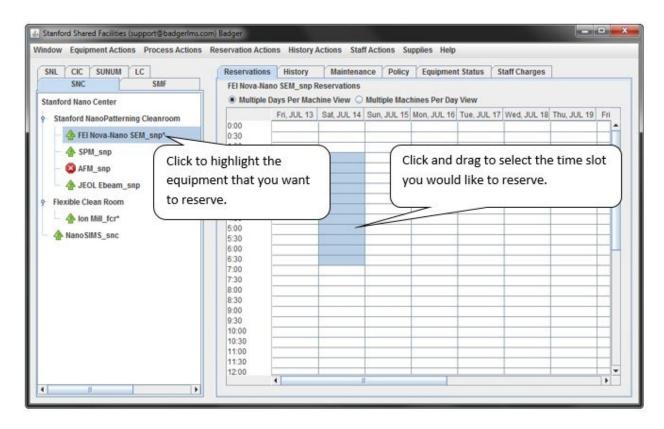


# 5 RESERVING AND ENABLING TOOLS

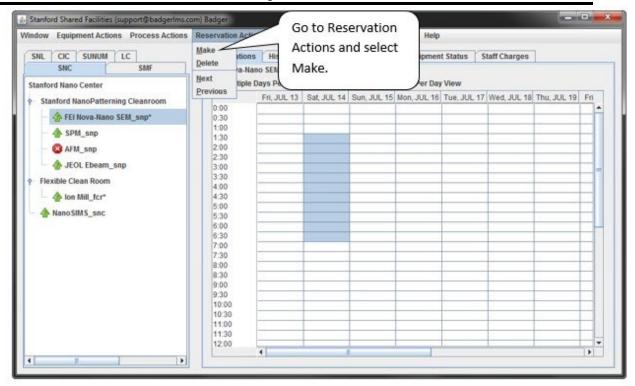
- To reserve or use a tool, members need to be qualified on that equipment. Please contact the relevant staff member to conduct the training. Once you have passed the requirements you will be added to the list of qualified users for that tool.
- If you are qualified on a tool, you will see an asterisk next to the equipment name.
- Reserving a tool merely books a time slot for you. To use the tool itself you
  will need to enable it in Badger. This physically turns on a key component of
  the tool. Charges are based on the tool enable/disable times.

# 5.1 CREATING A RESERVATION



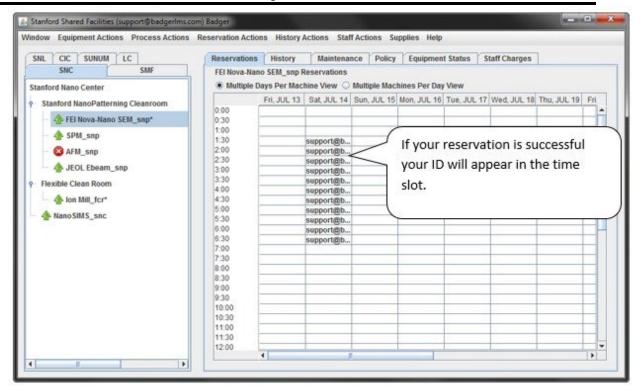


#### Badger LMS



- After clicking on Make, the Machine Reservation Information box will be displayed.
- Select the appropriate Project, Account, and enter any Process information if needed. When finished click OK and the reservation will be made.
- Clicking on iCalender will confirm a reservation and send you an email.
   When you open the email and accept the reservation, the date and time will be added to your calendar.
- Occasionally, reservations are rejected because the lab may have maximum reservation time limits or other policies which conflict with your reservation. Check with lab staff if this occurs.





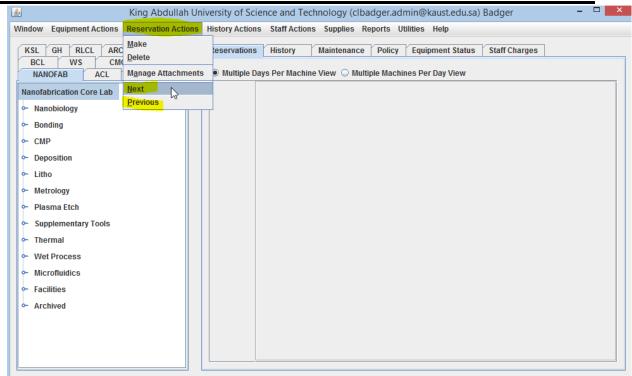
#### 5.2 MULTI-DAY RESERVATIONS

Users may reserve multiple days at a time by right-clicking on a highlighted reservation area.

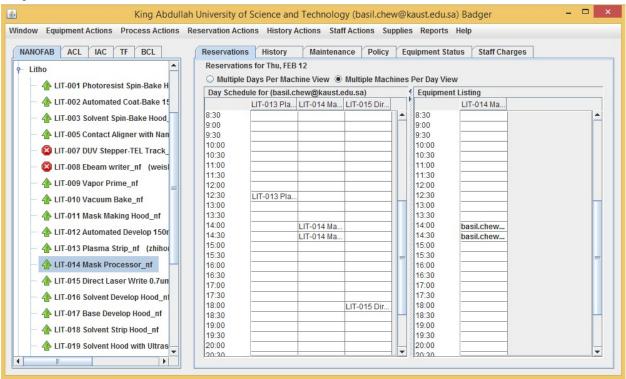


### 5.3 RESERVATIONS SCHEDULE

To view dates in the past or future, select **Reservation Actions – Next/Previous**.



To see your reserved tools for the day, you can click on the **Multiple Machines Per Day View** in the **Reservations** tab.

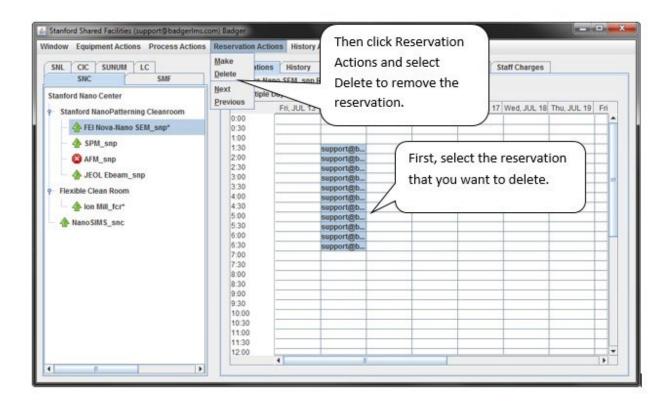


#### 5.4 RESERVATION NO-SHOWS

If you reserve a tool and do not enable it within a certain period your reservation may be automatically cancelled. This grace period differs from tool to tool and is set by the labs. You may be penalized or charged for the no-show.

#### 5.5 DELETING A RESERVATION

- If a reservation was made in error or you are unable to use the equipment for the time you requested you can remove the requested time.
- You can only delete your own reservations.
- You cannot delete a reservation which is in progress or has expired.
- Please check with the individual labs regarding their cancellation policies.

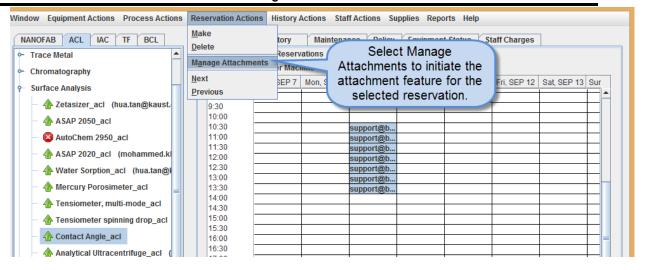


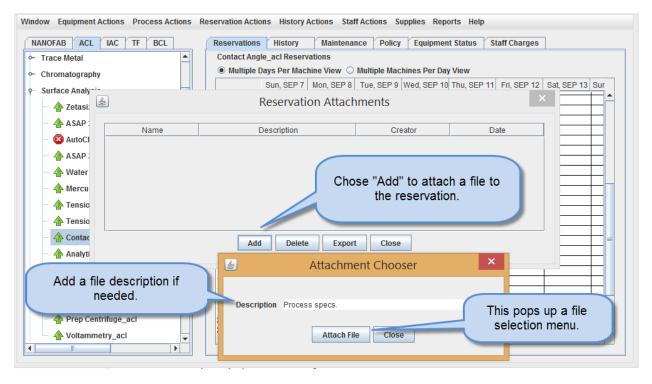
#### 5.6 RESERVATION ATTACHMENT

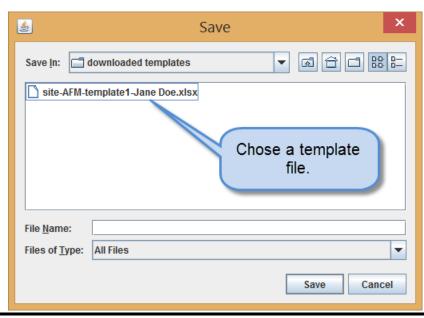
There are a number of process scenarios which involve member specified processing instructions which staff may need to know of prior to the actual reservation time. This process information frequently takes the form of a spreadsheet, but may also be a document of another format. The Badger Attachment feature allows a member to attach a file to a reservation within a configurable size limitation.

A member should create a reservation just as they normally would by selecting the device, dragging the time slot and selecting project information.

#### Badger LMS



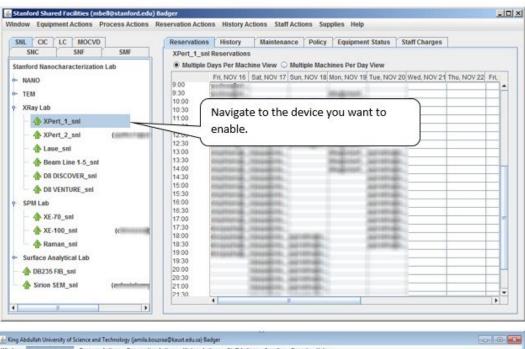


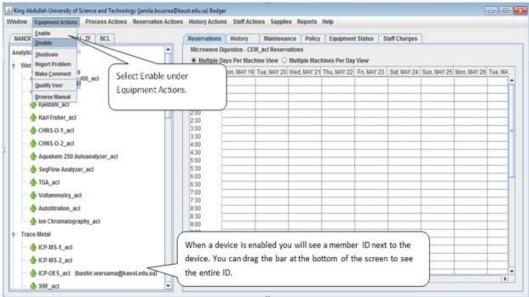


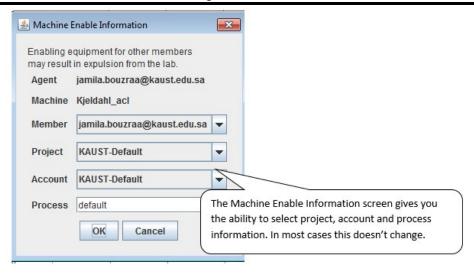
Multiple files may be attached to a reservation. Only staff in the lab may review and download these file attachments.

### 5.7 ENABLING A DEVICE

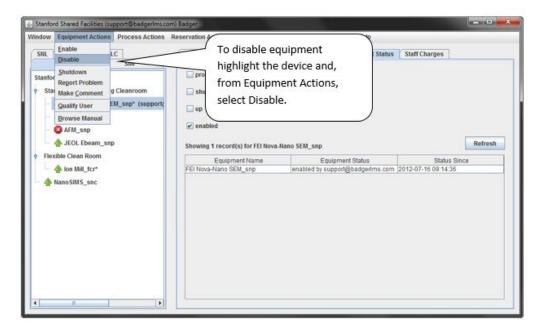
- Before a device may be used you must enable it in Badger. Most equipment have a physical interlock which will prevent some key component from functioning unless the device is enabled in Badger.
- When you have been qualified by staff, it may take few minutes before the qualification propagates out to the system. You may need to log off and log back on to get any new qualifications.
- Charges generally accrue from the moment a device is enabled and continue until the device is disabled.



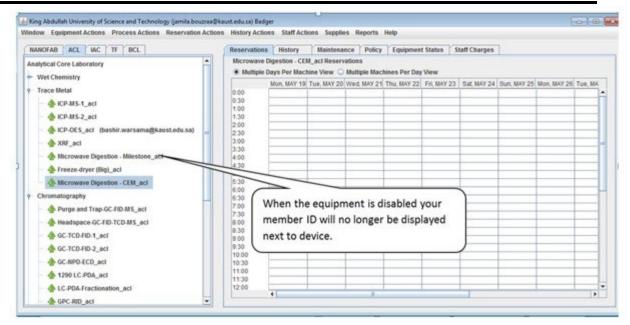




# 5.8 DISABLING A DEVICE



#### **Badger LMS**

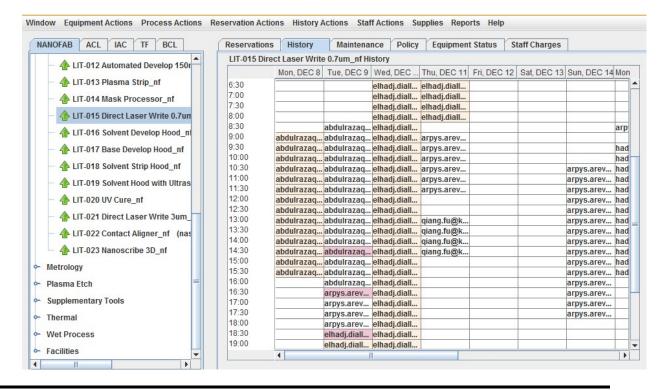


Make sure to disable. If you do not disable the charges will incur for the entire time you have enabled the instrument.

Do not disable Badger if the tool is still running, any misuse of Badger may lead to disciplinary action.

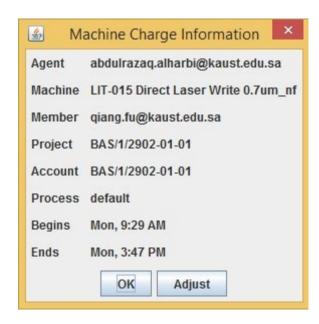
#### 5.9 HISTORY TAB

To view the enable history for a tool, go to the History tab.



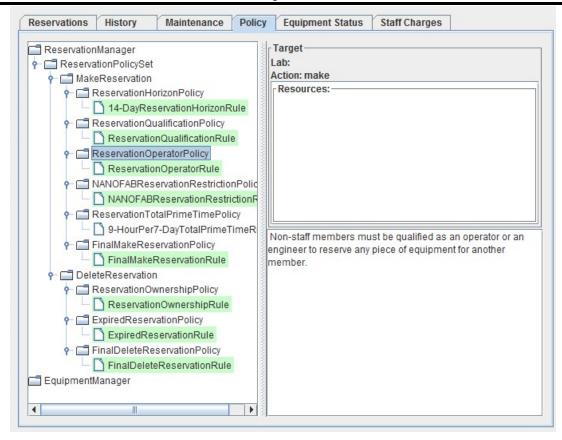
If you need to view an earlier or later date, go to **History Actions** and select **Previous** or **Next.** 

Double clicking on a calendar entry shows the tool enable details. **Agent** is the staff member or the user who enabled the tool, **Member** is the user who will be charged. In this case a service request was asked for by the member.



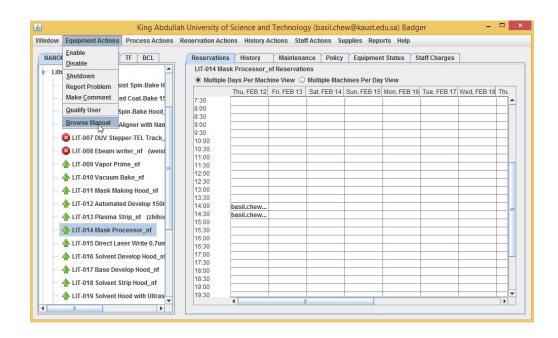
# **6 RESERVATION POLICY**

To view the reservation policies, select the Policy tab. Clicking on the icons will give an explanation of the policy.



# 7 TOOL MANUALS/STANDARD OPERATING PROCEDURES

- Tool manuals can be accessed from the Equipment Actions menu.
- Simply select the tool of interest and click on Equipment Actions, Browse Manual.
- Not all tools may have a manual/SOP attached.



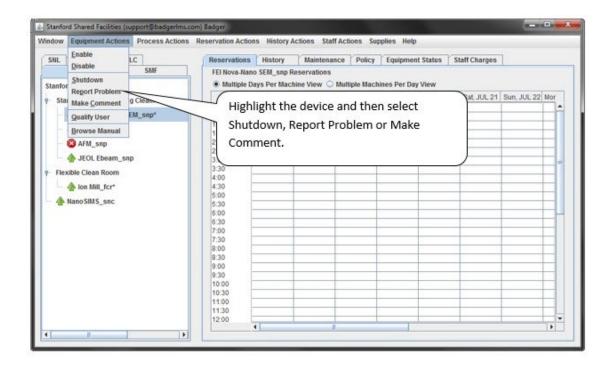
# 8 TOOL ISSUES

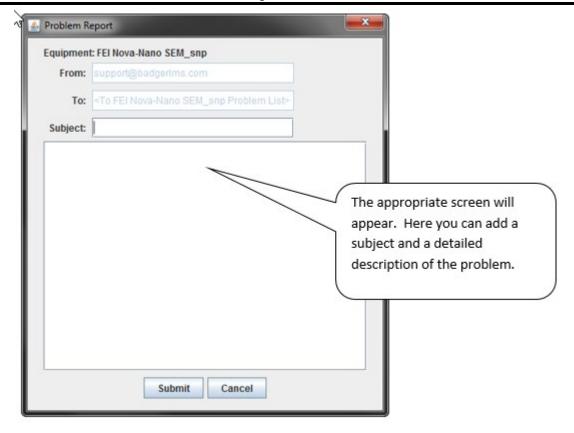
#### 8.1 TOOL STATUS ICONS

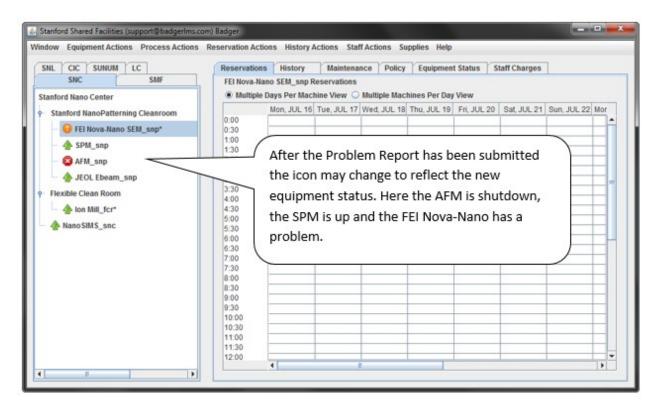


#### 8.2 REPORTING TOOL ISSUES

- If you encounter problems while using the tool you have the following options:
  - Make Comment: Insert a comment for staff. Tool remains in full operational mode.
  - Report problem: Insert a subject and detailed description of the problem. Tool status icon will show "The tool has equipment problems" but can still be enabled.
  - Shutdown: Insert a subject and detailed explanation of shutdown reason. Tool status icon will show "The tool is shutdown". You cannot enable the tool until the shutdown is cleared by staff.
- Any member can shutdown, report problems or make a comment.
- A shutdown or problem can only be cleared by staff.

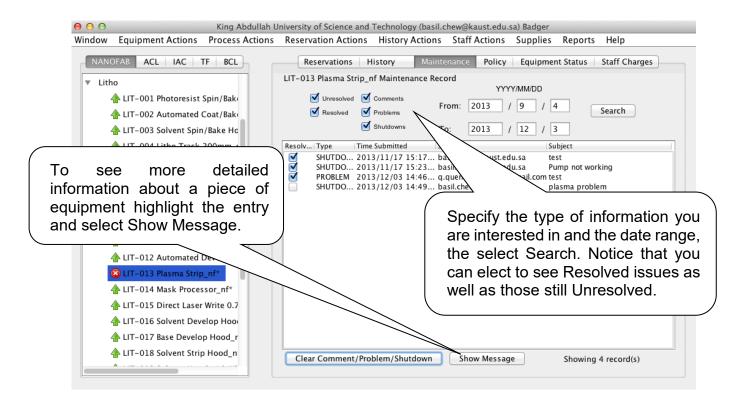






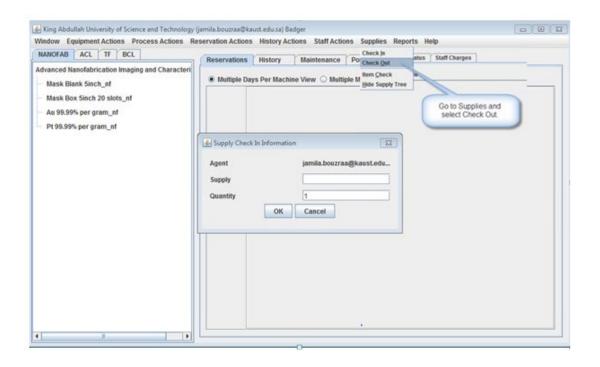
# 8.3 REVIEWING MAINTENANCE INFORMATION

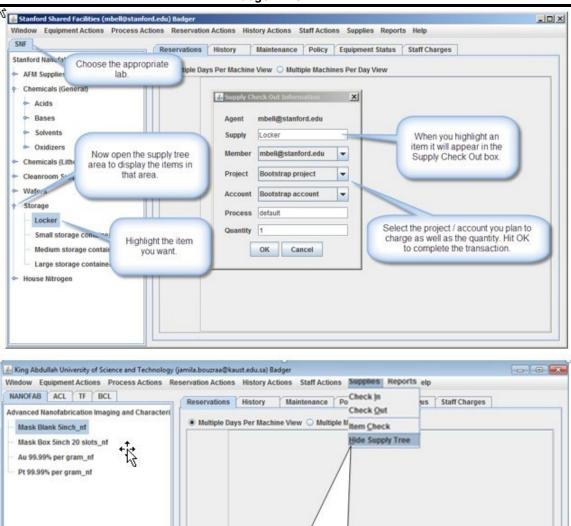
 Details on tool shutdowns, problems and comments can be found in the Maintenance tab.  Simply select the tool, entry of interest and click on the Show Message button.



# 9 INVENTORY CHECKOUT

- Check with lab staff for a price list of items in the lab.
- The supply tree does not display until you select Check Out as shown below.





# 10 MEMBER REPORTS

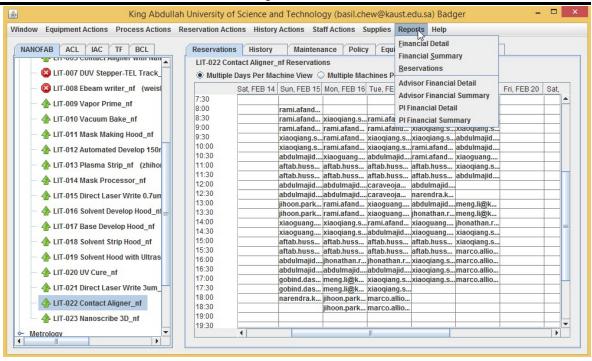
 Members can see a report on their activities via the Reports menu selection at the top of the screen. While Members may only view their own activities they will find that the Financial Detail report is parameterized to enable a variety of queries. Once a report is created it can be downloaded to your computer and input into Excel or other applications.

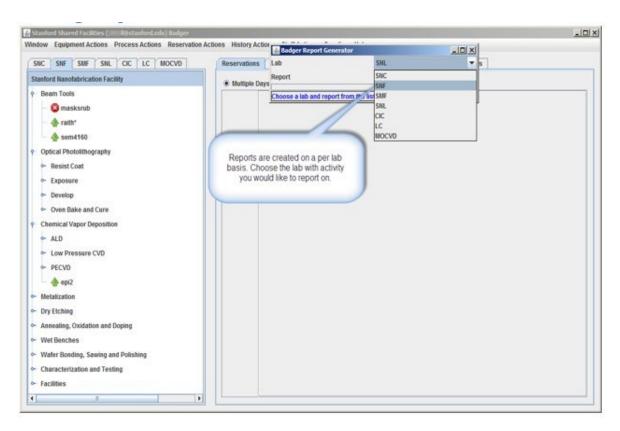
To return to equipment, Click on supplies and

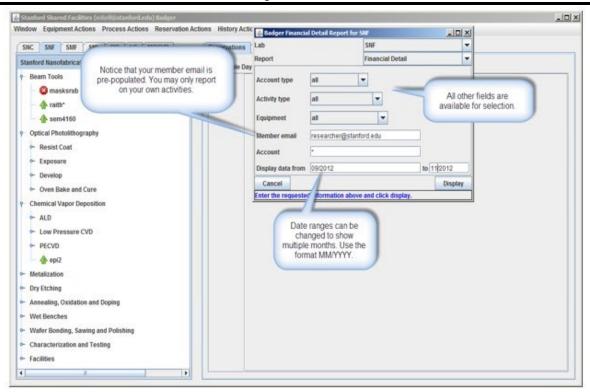
then click on Hide Supply tree

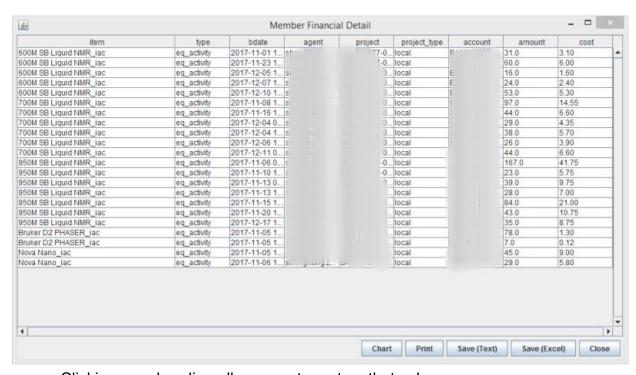
 Principal Investigators or Advisors will be able to see details of all users registered under them.

#### Badger LMS









- Clicking on a heading allows you to sort on that column.
- Amount is the number of minutes a device was enabled or inventory count.
- **Cost** indicates the current cost for this use as calculated at midnight. For performance reasons cost figures are recalculated each night and not at the time a report is run.
- Type: eq\_activity=tool usage, inven\_activity=samples/supplies, staff\_activity = staff time

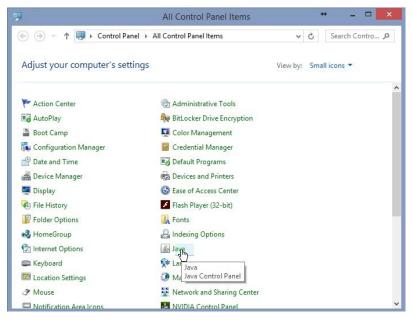
# 11 TROUBLESHOOTING

# 11.1 UNABLE TO LAUNCH BADGER

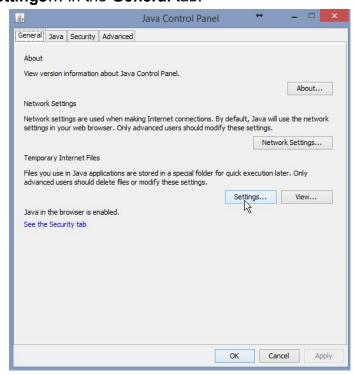
Badger is a Java Web Start application. If you are unable to launch Badger you may need to do a clean reinstall using the following steps:

#### 11.1.1 For windows users

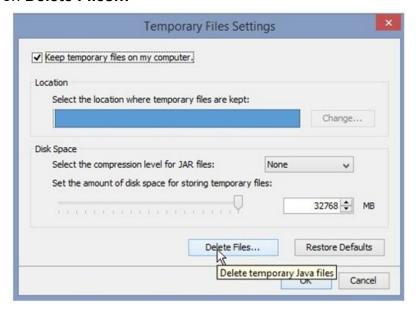
Go to the Control Panel and select Java.



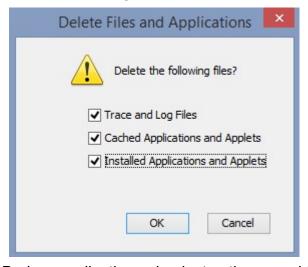
Select Settings... in the General tab.



Click on Delete Files...



Select all checkboxes and hit OK.

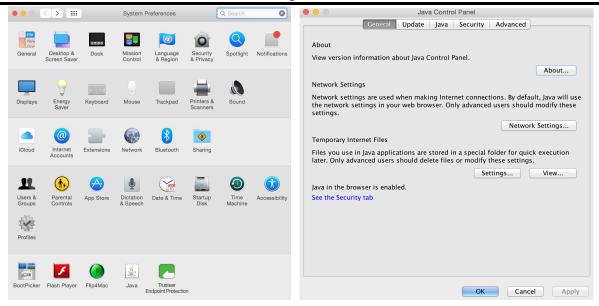


• Reinstall the Badger application using instructions provided in section 2.2.

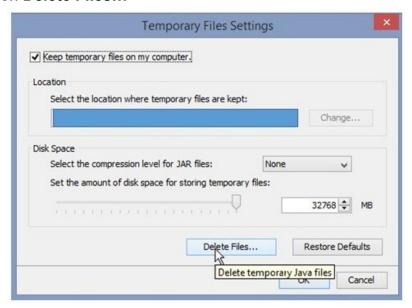
#### 11.1.2 For Mac users

Launch System Preferences and click on the Java icon at the bottom. This
will open a new Java Control Panel.

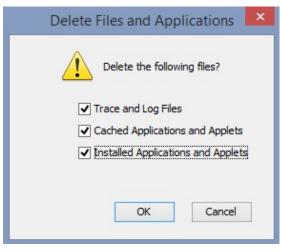
#### Badger LMS



- In the **General** tab, click the **Settings...** button.
- Click on Delete Files...



Select all checkboxes and hit OK.



Reinstall the Badger application using instructions provided in section 2.2.

#### **11.2 FAQS**

- Registration When I register on Badger it only allows me to select one Lab. Does this mean I can only use one lab?
  - No. The system just requires that you select a Lab but you will automatically be eligible to use all the Core labs depending on your certification and training.
- Registration When I register on Badger it only allows me to enter one pocket ID. Can I use multiple Pocket IDs?
  - Yes. To avoid errors in entering multiple Pocket IDs during registration you are only required to enter one pocket ID. However if you wish to use more than one you will have to submit these pocket IDs in the RFS system. No pocket ID can be used unless it has been approved by the Principal Investigator in RFS.
- Charging Can one pocket ID be shared on the system by multiple PIs?
   No. Each Pocket ID only has one owner in RFS system and SAP, the information in all three systems must be the same.
  - Charging Can a user select from multiple pocket IDs for charging purposes?

Yes.

# 11.3 CONTACT INFORMATION

Please send an email to clc@kaust.edu.sa if you have any questions.