GETTING STARTED

Step 1: Login to Infinity X:

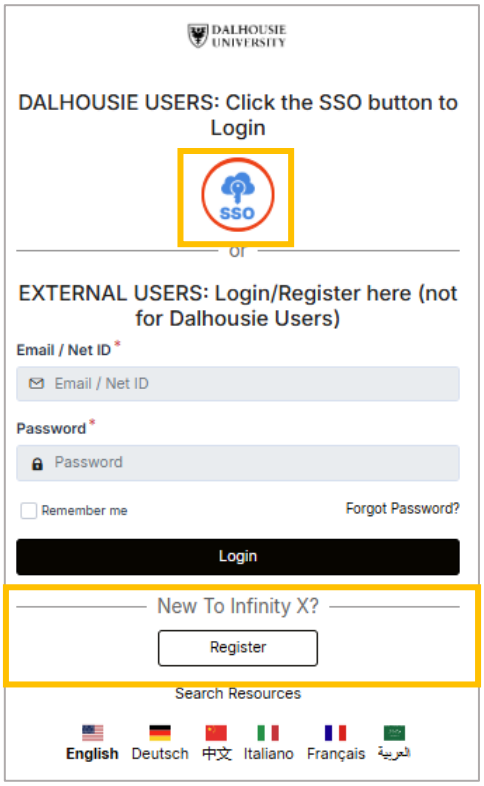
Navigate to the Dalhousie Infinity X login page: https://infinity.ideaelan.com/du/auth/login

INTERNAL USERS: If you have a Dalhousie NetID, select the **single sign-on (SSO)** button to log in. You will be directed through Dalhousie's institutional sign-on.

Dalhousie users do not need to register

EXTERNAL USERS: If you do not have a Dalhousie NetID, click on the **<Register>** button on the home page. Once confirmed, you can log in using the registration email and password.

Do not register if you have a Dalhousie NetID.



Step 2: Navigate the New User Wizard

New users will be directed to the User Wizard. Click on **<Start>** to initiate.

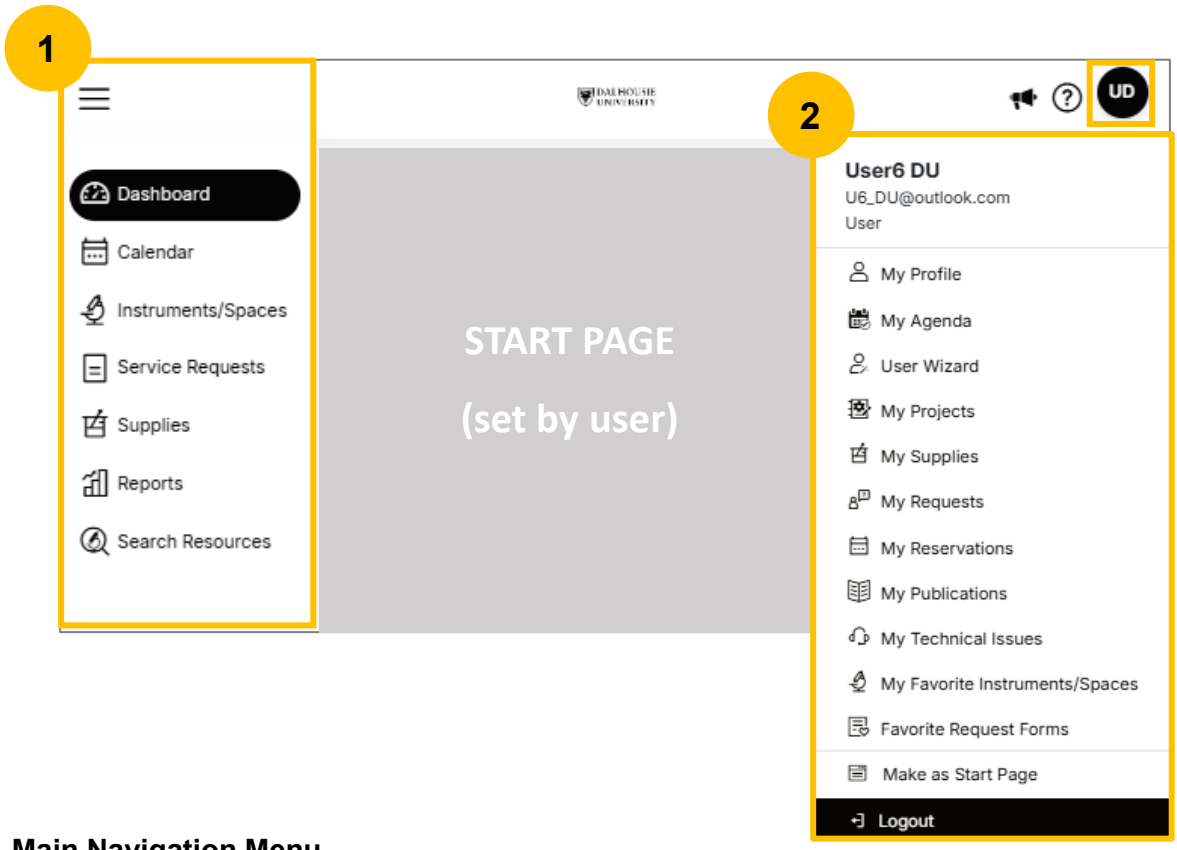
Choose a Client. Click **<Request Access>** next to the name of the Client that will be financially responsible for your use of the facility. The Client Administrator will be notified by e-mail and prompted to approve your request. Click **<Continue>**

IMPORTANT: If you do not see the appropriate Client profile listed, the Client is not registered with Dalhousie. ***You will not be able to submit requests for services or infrastructure access until this Client is registered and has approved you as an affiliated user.***

Choose a Facility (optional). You do not need to select a facility at this stage, click **<Continue>** to skip this step. Facility access is discussed on page 3.

GETTING ORIENTED

Infinity X includes several ways to access information and complete common tasks. The main navigation menu is used to find resources and initiate activities, while the user menu provides access to your profile, requests, reservations, favourites, and other information specific to you.



1. Main Navigation Menu

Use the left-hand main navigation menu to search resources and start an activity:

- **Instruments/Spaces** → to request access or schedule reservations
- **Calendar** → to schedule reservations
- **Service Requests** → to request a service

2. User Menu

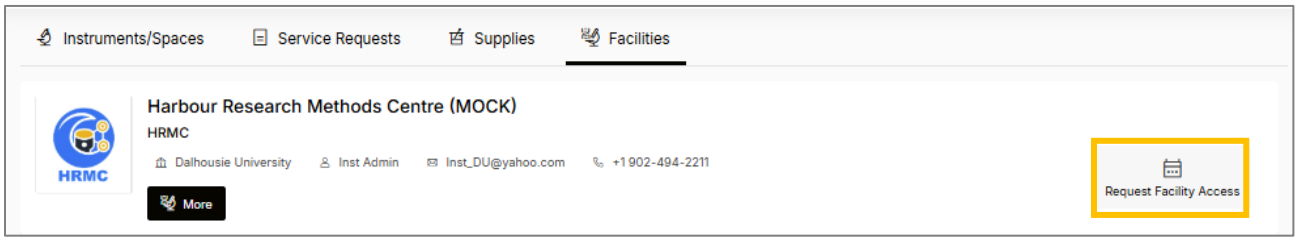
Click on your user icon to open the user menu. Use this menu to update your profile and track an activity already started:

- **My Requests** → submitted request forms
- **My Reservations** → scheduled bookings
- **My Technical Issues** → issues you've reported

HOW TO ACCESS A FACILITY

Step 1: Locate the Facility and Request Facility Access

Click **<Search Resources>** on the main navigation menu and navigate to **Facilities**



Step 2: Submit the Facility Access Request

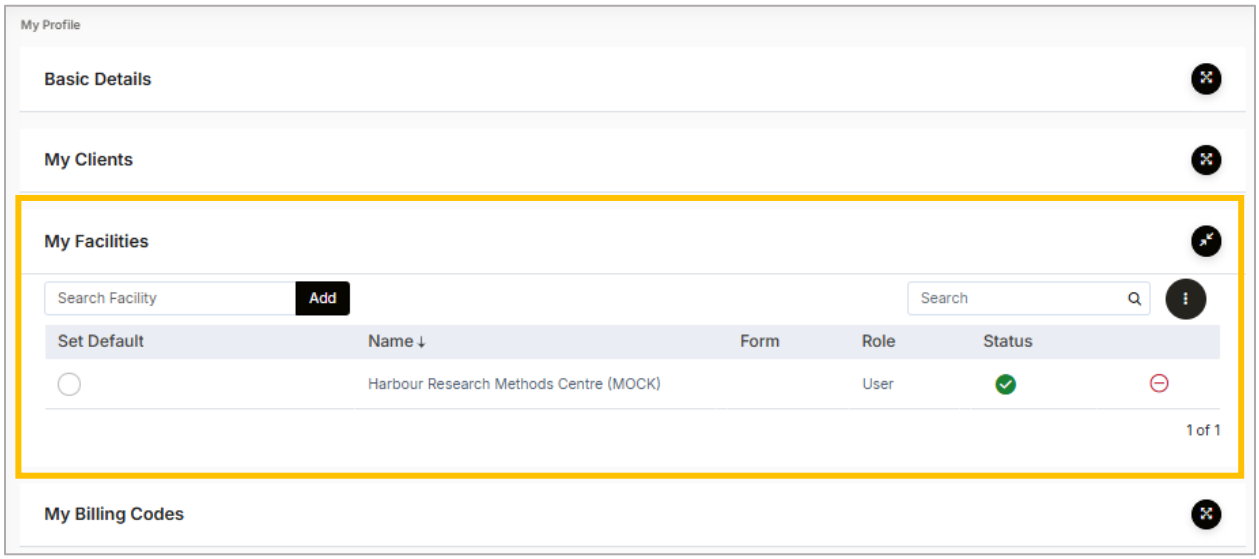
Complete the facility access form if one is presented.

Review the information and submit the request. The user submits an access request, and the facility administrator reviews the submitted information and approves or rejects the request.

Step 3: Monitor the Request

Your request will be sent to the facility admin or in-charge person for review. Any follow up or updates will be sent via e-mail.

You can check the status of your facility access under the user menu **My Profile → My Facilities.**

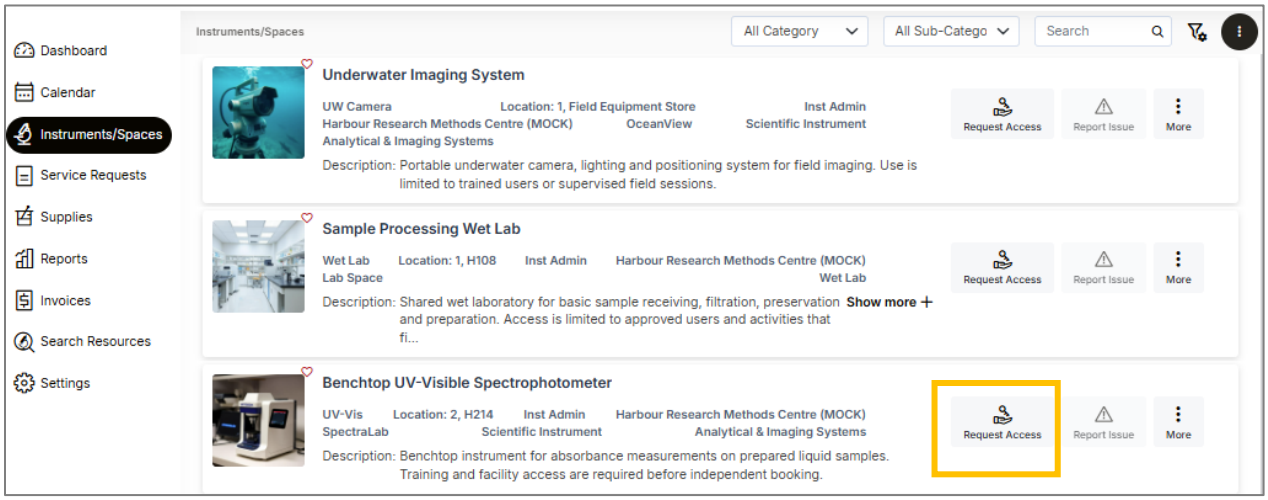


HOW TO RESERVE INSTRUMENTS OR SPACES

Step 1: Locate the Instrument or Space

Click **<Instruments/Spaces>** to open a list of facility resources available to users.

When you do not have access to an instrument, **Request Access** will appear beside the description instead of **Schedule**. Select **Request Access** and complete the access form, if required.

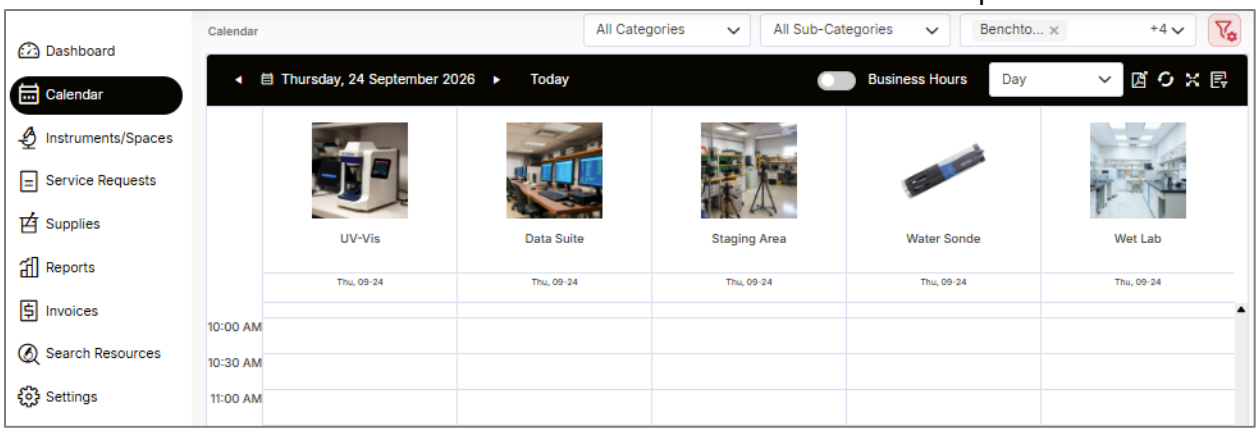


Step 2: Monitor the Request

Your request will be sent to the facility admin or in-charge person for review. Any follow up or updates will be sent via e-mail. Once access has been approved, you can reserve the instrument according to the facility's booking rules.

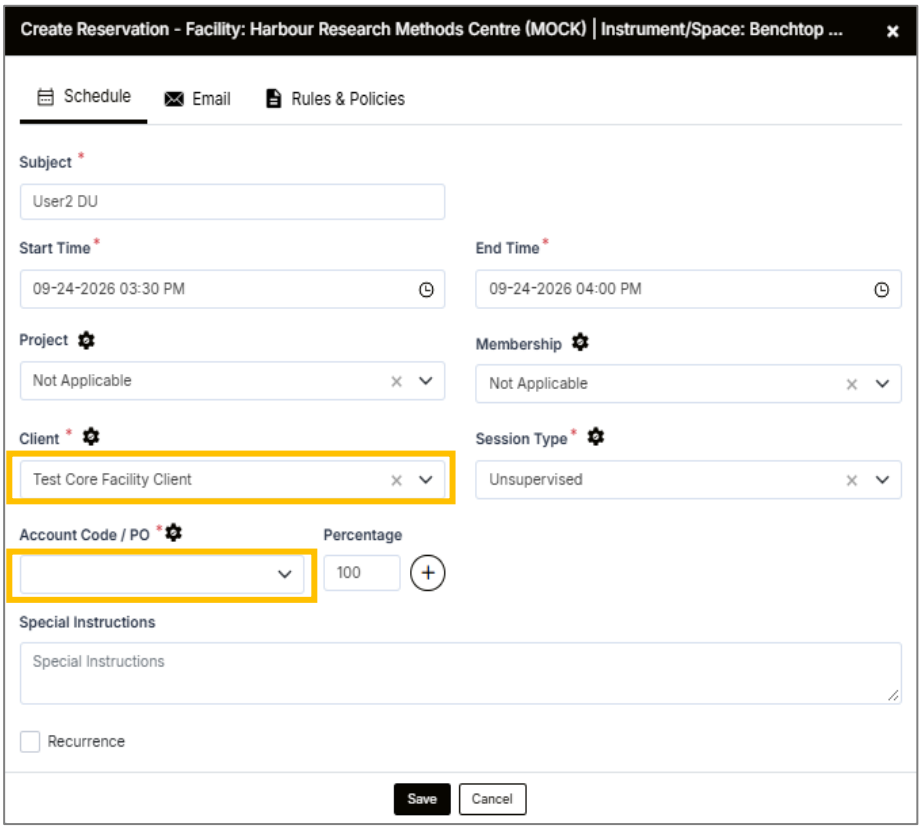
Step 3: Create a Reservation

Click **<Calendar>** and select a timeslot on the calendar for the instrument/space.



A **Create Reservation** window will appear to confirm your requested time and billing information. Billing information is required even if there are no charges associated with the reservations.

If you do not see the appropriate Client profile, the Client registration is not complete. ***You will not be able to submit requests for services until this Client is registered and has approved you as an affiliated user.***



Click **<Save>** to submit. The facility may have additional review/approval steps and/or form linked to this resource.

HOW TO REQUEST SERVICES

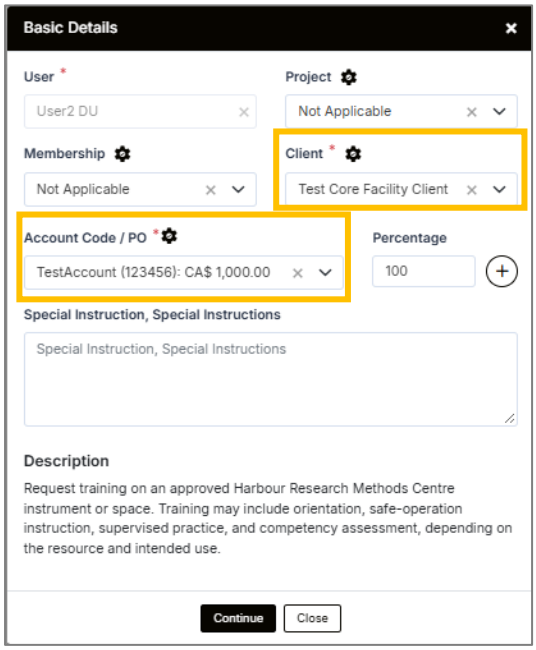
Step 1: Locate the Service Request Form

Click **<Service Requests>** This will display all of the facility's request forms available to you.



Step 2: Initiate a Service Request

Select the form you are interested in. The **Basic Details** window will appear with a description of the service and to confirm your billing information. Billing information is required even if there are no charges associated with the form (for example, a quote request).



If you do not see the appropriate Client profile, the Client registration is not complete. ***You will not be able to submit requests for services until this Client is registered and has approved you as an affiliated user.***

Step 3: Submit the Request Form

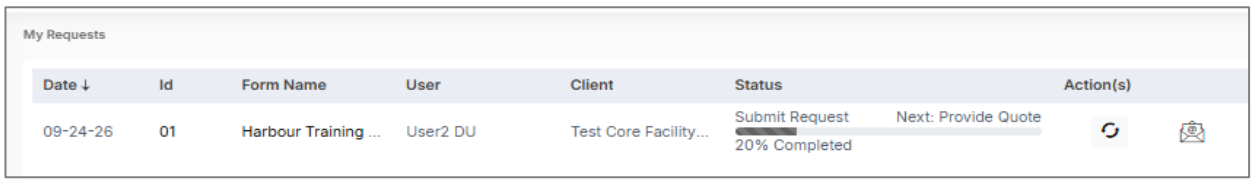
Complete the fields for the specific request form. When you are ready to submit the form, click **<Submit>**. You will receive e-mail notifications for activity or communication relating to this request and can view the request progress in **My Requests**



HOW TO MANAGE REQUESTS

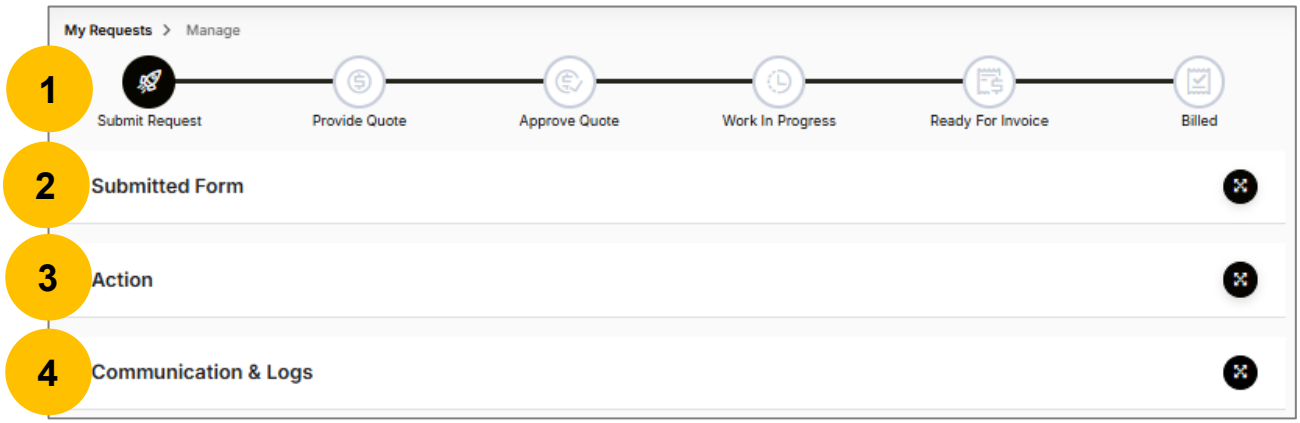
Step 1: Go to My Requests

Click the user menu and click **My Requests**



Step 2: Open Request Management Window

Click on the form name to open the request management window. This window is visible to all users/admins included in the workflow for that service request.



The request management window includes:

1. **Workflow progress bar** - as the request progresses through the workflow stages, the workflow progress bar at the top of the window will be updated
2. **Submitted Form section** (expandable) – review the information submitted in the form and any additional information added by an administrator, if applicable
3. **Action section** (expandable) – the request is advanced through each workflow stage when the applicable user clicks the appropriate action.
4. **Communications & Logs section** (expandable) – E-mails and attachments relating to the request can be sent directly from this section. A log maintains a record of communication and activity.

QUICK REFERENCE GUIDE

I want to…	Where to go
Find an instrument or space	**Instruments/Spaces** or **Search Resources** → **Instruments/Spaces**.
Request access to an instrument or space	**Instruments** → **select instrument** → **Request Access**. When a user does not have access, Request Access appears instead of Schedule.
Reserve and instrument or space	**Calendar**, or **Instruments** → **Schedule**. Selecting Schedule opens the calendar for that instrument.
Find a services across Dalhousie	**Search Resources** → **Services.** The Search Resources area provides a Services tab and a search bar.
Submit a service request	**Service Requests** → select the appropriate facility from the top left list of facilities available to you. Find and select the appropriate form.
Check a service request	**My Requests.** Users can see submitted service requests, their status, submitted form, and workflow.
Check my reservations	**My Reservations.** This displays your instrument and space bookings.
Reprot an instrument problem	**Instruments** → **Technical Issue.** The issue entry includes subject, description, severity, and an optional attachment.
View a problem I reported	**My Technical Issues.**
View my facility access	**My Profile** → **My Facilities.** The profile area shows pending or active facility access and submitted facility access forms.
Find resources across Dalhosuie	**Search Resources.** The search area includes Instruments/Spaces, Services, and Facilities.
View my client affiliations	**My Profile** → **My Clients.** The profile area shows pending or active client affiliations.