### TCAG Online Customer Services

Web address: http://tocs.tcag.ca Support email: oligo@sickkids.ca

Version: 1.1

## A quick tutorial for TOCS customers

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### **Outline**

- 1. About the TOCS project.
- 2. What can TOCS do for you?
- 3. How are *user accounts* organized?
- 4. Roadmap for TOCS customers.
- 5. How to create and manage *user account* in your group?
- 6. How to create and manage *payment* account in your group?
- 7. How to order oligos and check order status?
- 8. How to view orders placed by your group members?
- 9. How to get your group's invoices?
- 10. Things need to keep in mind.

### 1. About the TOCS project

- Laboratory Information Management System (LIMS):
  - Sample tracking
  - Workflow controlling
  - Data gathering and storing
  - Result reporting and accessing
- o TOCS is a web-based LIMS, plus e-business enabled:
  - Widely accessible through Internet.
  - Online ordering and billing.
  - TOCS is a secure site. Your data is protected.



### 2. What can TOCS do for you?

- TOCS is widely accessible through Internet, with a web browser you can:
  - Order services, eg, DNA synthesis, DNA sequencing.
  - Track the status of your orders.
  - Access results, eg, DNA sequences, genotypes.
  - Get invoices.
- Currently, only DNA synthesis facility has been implemented. Ultimately, TOCS will cover all TCAG facilities.
- First testing version was formally released on Aug 22, 2005.

## 3. How are *user accounts* organized?

- o In order to use TOCS, every user needs a *user account*.
- Users are organized into user groups, a group is typically a research lab.
- There are three types of users in a user group:
   PI, superuser and normal user.
- Every group must have one and only one PI or Supervisor.
- For any user group, firstly, its PI account has to created by TCAG. Then the PI can login to TOCS, and create superuser(s) and/or normal user(s) in his/her group.

### Example showing one *user group*, *user accounts*, and *user types*.

Home Synthesis	s Sequencing FISH							Hel		
My account  Group members  Below is the members in your group (click user ID to edit):										
Change password  Group ordered	<u>All</u> / <u>None</u>	User ID	User type	Name	Email	Telephone	Status	Date created	Date modified	Expi date
services		10051	PI	Steve Scherer	steve@genet.sickkids.on.ca	416-813-7613	activated	Aug 17,2005	Aug 17,2005	Nev
nvoices Payment info		10052	superuser	Jennifer Skaug	jskaug@genet.sickkids.on.ca		activated	Aug 17,2005	Dec 22,2005	Nev
Group members		10053	normal user	Yan Ren	yanren@genet.sickkids.on.ca		activated	Aug 17,2005	Dec 02,2005	Nev
ogout		10054	normal user	Lars Feuk	lars@genet.sickkids.on.ca		activated	Aug 17,2005	Aug 17,2005	Nev
Contact us		10057	normal user	Shin-ichi Horike	shinichi@genet.sickkids.on.ca		activated	Aug 17,2005	Aug 17,2005	Nev
		10058	normal user	Kohji Okamura	kohji@genet.sickkids.on.ca		activated	Aug 17,2005	Dec 01,2005	Nev
		10059		Dorota Kwasnicka-Crawford	dorota@genet.sickkids.on.ca		activated	Aug 17,2005	Nov 17,2005	Nev
		10060	superuser	Jo-Anne Herbrick	joanne@genet.sickkids.on.ca	416-813-8319	activated	Aug 17,2005	Nov 22,2005	Nev

### What's the differences of the three user types

Operations User type	User account manage-ment *	Assigning superuser	Payment account manage-ment **	Viewing invoices	Viewing group members' orders	Viewing own orders	Placing orders
PI	Yes	Yes	Yes	Yes	Yes	Yes	Yes
superuser	Yes	No	Yes	Yes	Yes	Yes	Yes
normal user	No	No	No	No	No	Yes	Yes

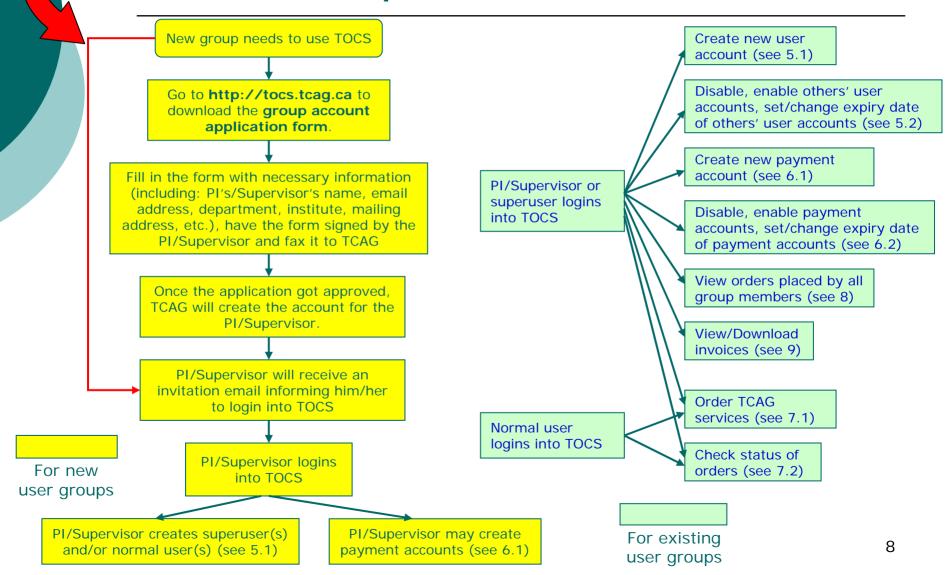
<sup>\*</sup> Includes: creating, disabling and enabling user account, and setting the expiry date of user account.

The reason we need *superuser* is that, in case PI is too busy, he/she can assign somebody in the group to be a superuser, so that the superuser can perform necessary managerial activities. Of course, if PI prefers to take care of user accounts and payment accounts in the group by himself/herself, he/she doesn't need to assign any superuser in the group.

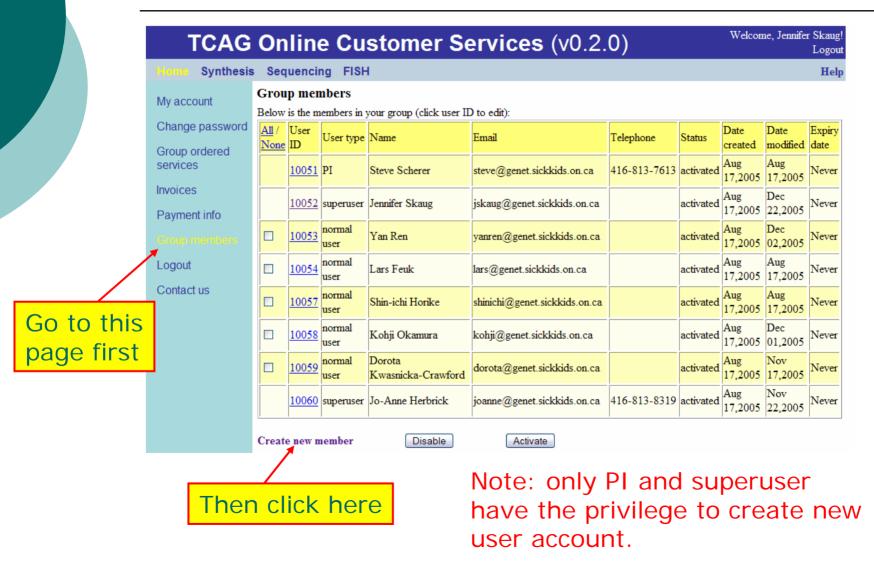
<sup>\*\*</sup> Includes: creating, disabling and enabling payment account, and setting the expiry date of payment account.

Note: at the initial process of setting up TOCS, TCAG directly creates accounts for the existing customers in the attempt to minimize the work on customer's side, i.e., customers used TCAG facilities in the past months don't need to submit an application form.

### 4. Roadmap for TOCS customers



# 5.1. How to create a new *user* account in your group? (1)



## 5.1. How to create a new user account in your group? (2)

		My profile	Create a new mer	nber in Steve Scherer's group:		you submit this form, TOCS will			
		Change password	-	Steve Scherer		matically send an invitation email taining some basic instructions and			
1		Group ordered	Group account status			password) to the new user. And			
		services	Group type		_	nitial status of the new user account			
		Invoices	-	: Genetics and Genomic Biology : The Hospital for Sick Children		wait confirmation". After the user			
			Institute	The Hospital for Sick Children		he invitation email and logged into			
		Payment info	A. Please provide the	following information of the new group member:					
			Name:			S, his/her account status turns to			
			E-mail:		acti	vated".			
		Logout		(Please ensure inputting a correct email address, you ca	n NOT ch	ange it later!)			
		Contact us	Telephone:	(a rease crisme inputing a correct crism address, you ea		ango a race.)			
	ou aro	the DL of	Fax:			If you did accidentally create a us			
you are the PI of		Full mailing address: Room 14-704, TMDT East Building, MaRS Centre, 101 C							
IIS	group	, you can	_	(including building, street, room number, etc)	ollege Sile	address. You can simply leave it			
ssign the new user be a <i>superuser</i> y checking here		City: Toronto  Province: Ontario			there, since no one will be able to				
					use it. TOCS system will				
<u>у</u> (	HECKII	ig riere	Country:			automatically clean it up at a			
			Post code:	M5G 1L7		proper time.			
			<b>\</b>						
			B. This user is a su	•					
(Note: Superuser can perform many management activities of the group, including creating accounts, etc. PI is automatically a superuser.)						g creating members, maintaining group payment			
			decounts, etc. 1115 date	maccay a superaser,					
			C. Expiry date:   (mm/dd/yyyy)   Never expires.						
			D. Invitation email:						
				nail to the new member. (Invitation email can also be ser	nt later).	Fill in the form,			
						then click this			
			E. User confirmation:						
			User's confirmation i     Don't need confirmation	needed		button			

Cancel

Confirm and Submit

a user

## 5.1. How to create a new *user* account in your group? (3)

- After account creation, usually the new user will receive the invitation email in a few minutes.
- o But, if the new user didn't get the invitation email even a couple of days after his/her account creation:
  - You can re-send him/her the invitation email (see 5.2 for how to re-send the invitation email).
  - If this still didn't work, likely the invitation emails were treated as spam by the user's email provider (eg. Yahoo).
  - So whenever possible, ask the new user to use an institute email account instead of a public one.
  - Ask the user to add oligo@sickkids.ca to his/her contact list, if he/she has to use a public email account. Then emails from TOCS system will not be treated as spam.
- You can always contact us at oligo@sickkids.ca if problem resists.

## 5.2. How to manage *user account* in your group? (1)



make change to

his/her account

# 5.2. How to manage *user account* in your group? (2)

#### Edit customer account information: My profile Group's PI: Steve Scherer Change password Group account status: activated Placed orders Department: Genetics and Genomic Biology Invoices Institute: The Hospital for Sick Children Payment info A. Update information of user (Kohii Okamura): User ID: 10058 User account status: activated Logout User type: normal user User name: Kohji Okamura Contact us E-mail: kohji@genet.sickkids.on.ca Telephone: Fax: Full mailing address: MaRS Centre - East Tower, Room 14-701, 101 College Street (including building, street, room number, etc) Citv: Toronto Province: Ontario Country: Canada Post code: M5G 1L7 ✓ Never expires. Expirv date: (mm/dd/vvvv)

If you are the PI of this group, you can change the user type: normal user ⇔ superuser

You can set the expiry date of the user's account. After the expiry date, the user will not be able to login or order any services.

You can also turn off / on the user's account.

B. Other management activities you can do to the user's account

Disable Activate

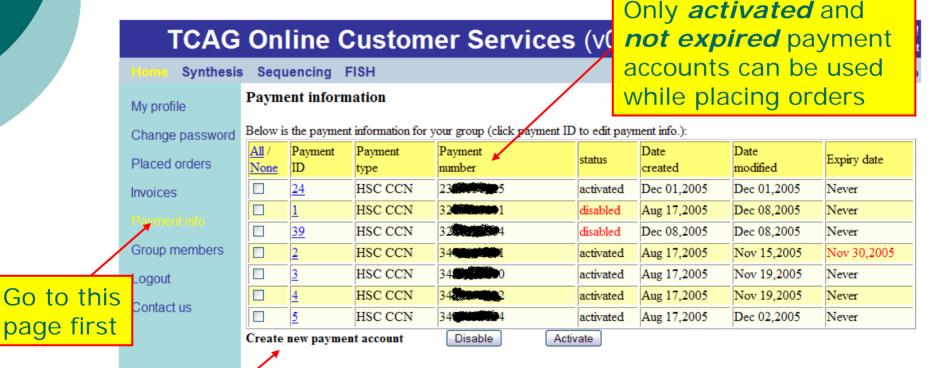
Cancel

Save changes

For an "await confirmation" account, a "**Send invitation**" button will show up here. You can use it to re-send the invitation email.

# 6.1. How to create *payment* account in your group? (1)

Before you can order TCAG services, you have to set up payment account(s) first.



Then click here

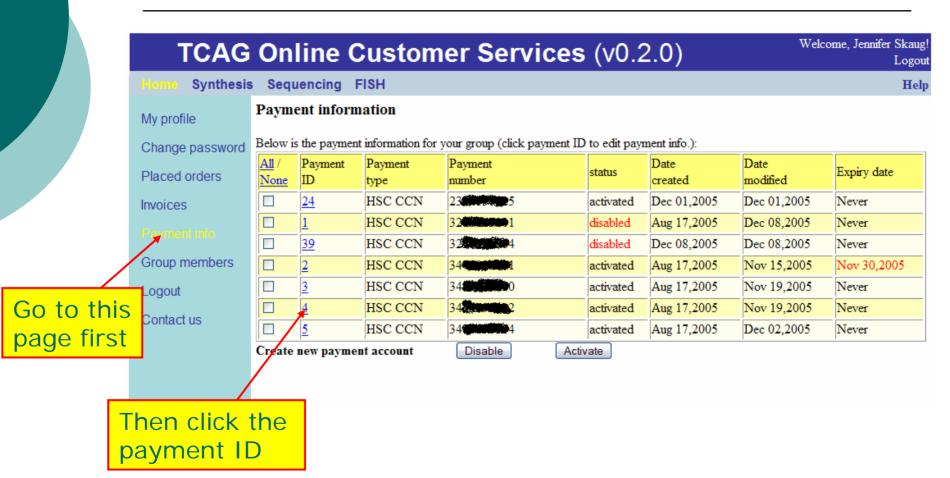
Note: only PI and superuser have the privilege to create new payment account.

# 6.1. How to create *payment* account in your group? (2)

click this button

My profile	Create new payment account for Steve Scherer's group (1051)							
Change password	I want to:							
Placed orders	Payment account type: Internal Cost Center Number (sick kids user) (Credit card payment will be supported soon)							
Invoices	Number: (Please ensure the number is correct, you can NQT modify it later.)							
Group members	Please input the following information for the new payment account:	If you did accidentally						
Logout	Billing address:	create a wrong payment						
Contact us	ATTN to:	account, please email us						
	Full mailing address: Room 14-704, TMDT East Building, MaRS Centre	to fix it.						
	(including building, street, foom number, etc)							
	City: Toronto							
	Province: Ontario	N/						
	Country: Canada	You can set the						
	Post code: M5G 1L7	expiry date of the						
		payment account.						
	Payment account expiry date: (mm/dd/yyyy) Never expires	. 3						
		After the expiry						
	Confirm and Submit Cancel	date, the payment						
		account can not be						
Fill in the form, then								

# 6.2. How to manage *payment* account in your group? (1)



## 6.2. How to manage *payment* account in your group? (2)

Edit group payment account information: My profile Group's PI: Steve Scherer Change password Group account status: activated Placed orders Department: Genetics and Genomic Biology Invoices Institute: The Hospital for Sick Children A. Update information of the payment account: Payment account ID: 4 Group members Payment account status: activated Logout Payment account type: Internal Cost Center Number (sick kids user) Cost center number: 34 Contact us Billing address: ATTN To: Julie You can update Full mailing address: Room 14-708, East Tower, MaRS Centre, 101 College Street (including building, street, room number, etc) these fields City: Toronto Province: Ontario Country: Canada Post code: M5G 1L7 ✓ Never expires. Payment account expiry date: (mm/dd/yyyy)

Cancel

B. Other management activities you can do to the group's account

Activate

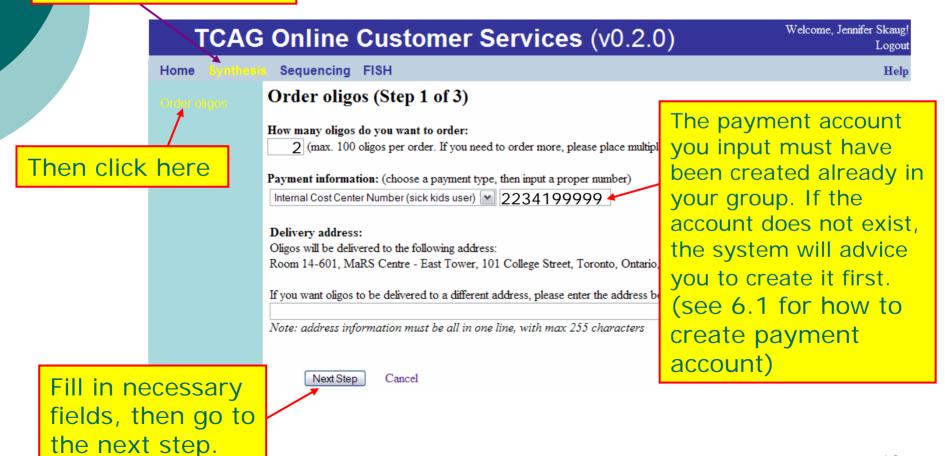
Save changes

Disable

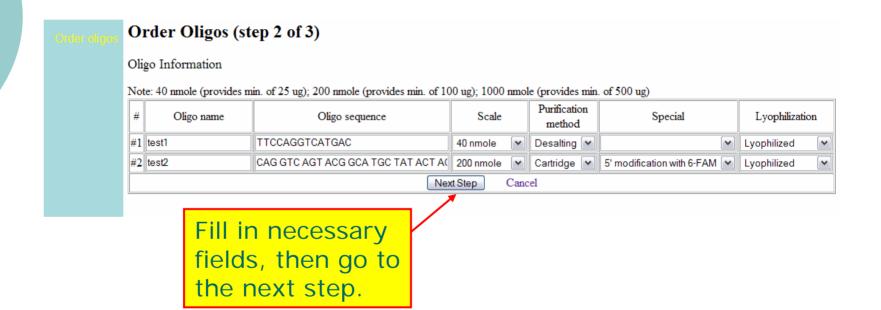
You can also turn off / on the payment account.

## 7.1. How to order oligos (1)

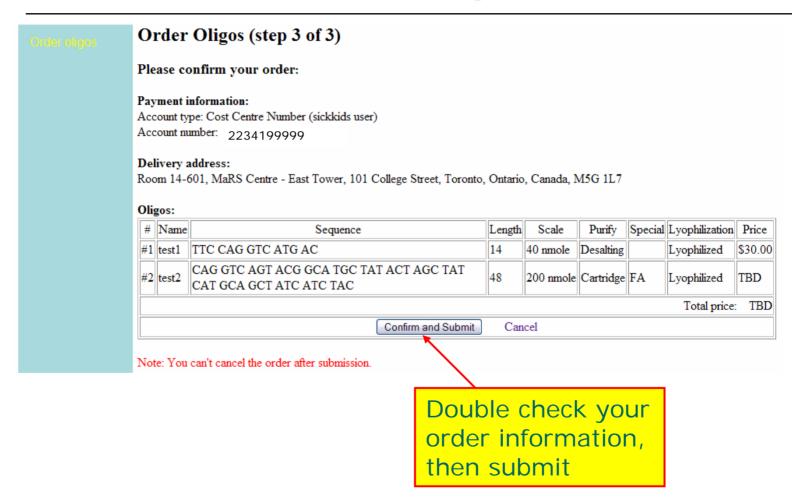
Go to the Synthesis facility first



## 7.1. How to order oligos (2)



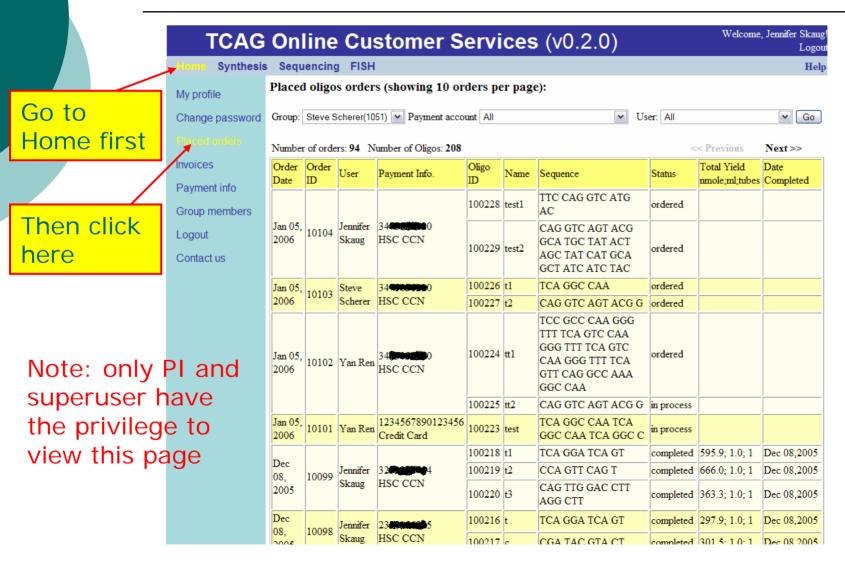
## 7.1. How to order oligos (3)



## 7.2. How to check your order status



# 8. How to view orders placed by your group members?



## 9. How to get your group's invoices?



Download the invoice in PDF by clicking the Invoice ID

Note: only PI and superuser have the privilege to view the invoices

### 10. Things need to keep in mind

o Bookmark TOCS web address:

http://tocs.tcag.ca

- Do not share user account. Everyone should use his/her own account.
- Never tell others your password.
- In case you have any problems with TOCS, please contact us at

oligo@sickkids.ca