

Hercules User Guide

Hercules is the platform that allows users to submit sequencing services requests. Through Hercules users will be able to request services, approve/reject quotes, submit work orders, and generate waybills to ship samples to the lab.

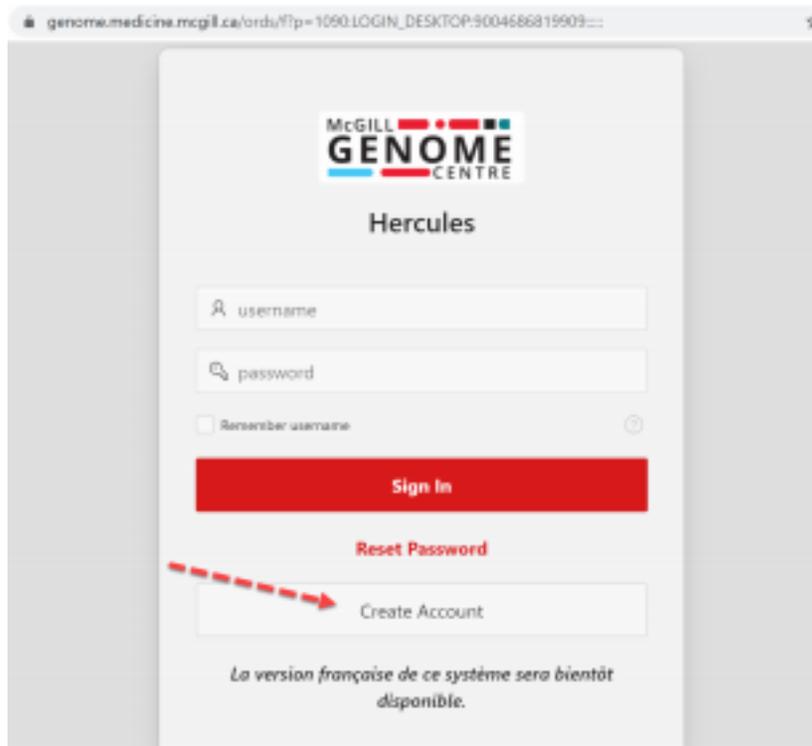
The current Hercules version 2.1 (as of May 2021) is the first production version to be available for end users. Just the necessary workflows and modules are available at this moment. More options and modules will be available in the next versions. If you need additional information please contact andres.tocasuche@mcgill.ca. To report any issues please submit an incident using the [google form](#).

Creating an account on Hercules

An account is required to be able to submit service requests to the MGC

How to create an account on Hercules?

1. Visit the Hercules **login page**:
 - a. hercules.genome.mcgill.ca
2. Click on the “**Create Account**” button.



3. Fill up the form and **Save** it. The system will send you a **confirmation email**.

Create Account ✕

Personal information

* First Name: Andres

* Last Name: Tocasuche

* Occupation: Assistant

Work Telephone: (514)-398-7211

Mobile Telephone:

* Referral Source: Returning user

Mailing List: Yes No

* Address Line1: McGill Genome Center 740 Dr Penfield Ave

Address Line2:

* City: Montreal

* Province/State: Quebec

* Postal/Zip Code: H3A 0G1

* Country: Canada

4. Check your email to **activate your account** by clicking on the “**Account Activation Link**”.
5. When clicking on the activation link the **Terms and Conditions** page will open. Please read the document and agree by ticking the checkbox and **Activate** the account.
6. The account should be active at this point. You will be able to login using the credentials you provided previously.

✓ Your account is active now. Please sign in.

McGILL
GENOME
CENTRE

Hercules

username

password

Remember username

Sign In

Reset Password

Create Account

La version française de ce système sera bientôt

Creating your first Project

When login in into Hercules you will be redirected to your home page. Creating a request is fairly easy.

1. Click on the **New Request** button.
2. Fill up the required fields and provide as much information as possible of your project.
3. If you are not the **lead investigator**, please make sure that you enter a valid email address for the lead investigator responsible for the project.

Are you the Lead Investigator for this project?: Yes No ←

"Lead Investigator" here refers to the researcher to whom the quote(s) and invoice(s) will be addressed and has authority over the project, both scientific and financial. Any invoice arising from this request will be paid by funds under control of the Lead Investigator at the Institution specified below.

If not, specify your job in this project: *

and Lead Investigator's email: * ? ←

Lead Investigator's Organization: *

"Organization" here is that to which invoice(s) pertaining to this request will be issued.

Lead Investigator's Demographic: *

Lead Investigator's Sector: *

a. An email will be sent to the lead investigator inviting her/him to create an account on Hercules

4. In the section “**Service Request Summary**” please select the service type you are requesting: **Genomics** or **Bioinformatics**.

5. In the text box to describe the work you are requesting, please mention as well the Project Manager you contacted for this request (if applicable).

Service Request Summary

Please note that if your project consists of genomics and bioinformatics services, then submit an independent request, one for Genomics and another one for Bioinformatics
To request a quote, describe the work you are requesting...

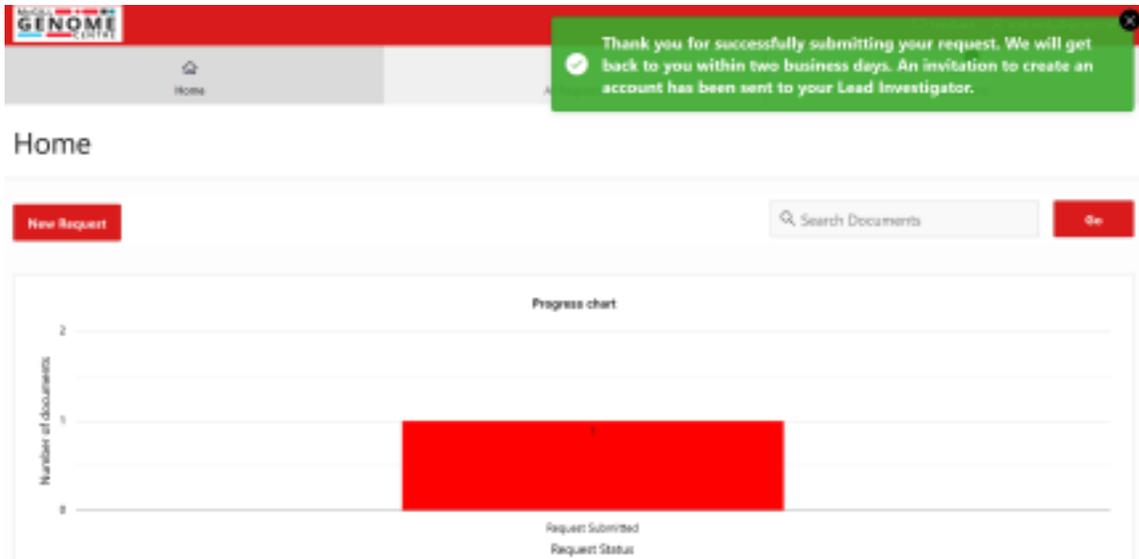
Request Status: **Request Initiated**

Kindly select the type of service you are requesting today * **Genomics** Bioinformatics

Describe the work you are requesting: (Please, provide as much information as possible to accelerate the issuance of the quote): *

6. When completing the form click on the “**Submit for Review**” button at the bottom right of the page.

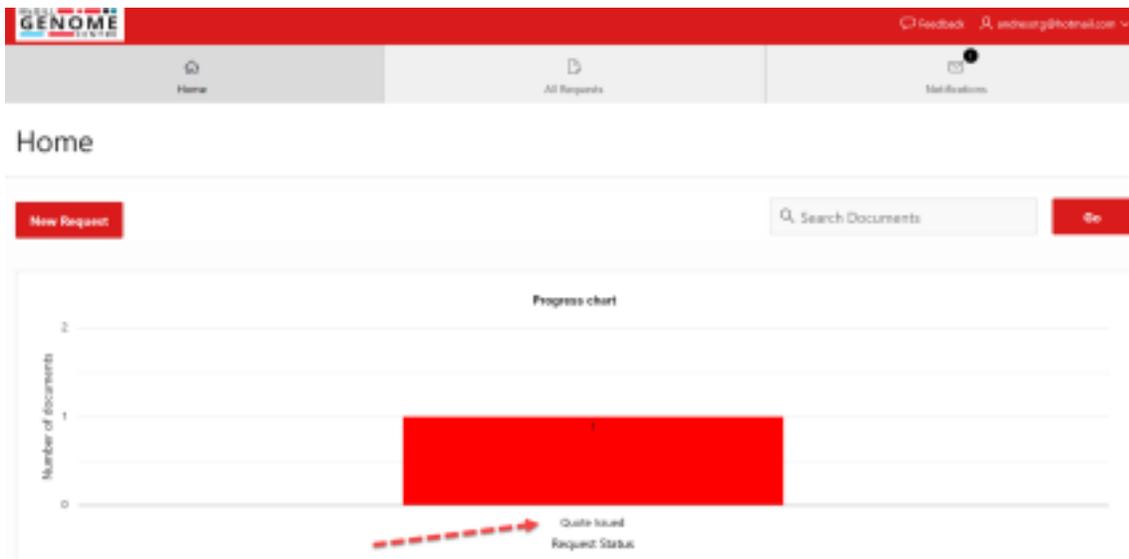
a. If you are not able to complete the form, you can use the “**Save for Later**” button. A draft will be saved and you will be able to access it later for completion.



7. Your request will be reviewed by a **Project Manager**.

Receiving a Quote

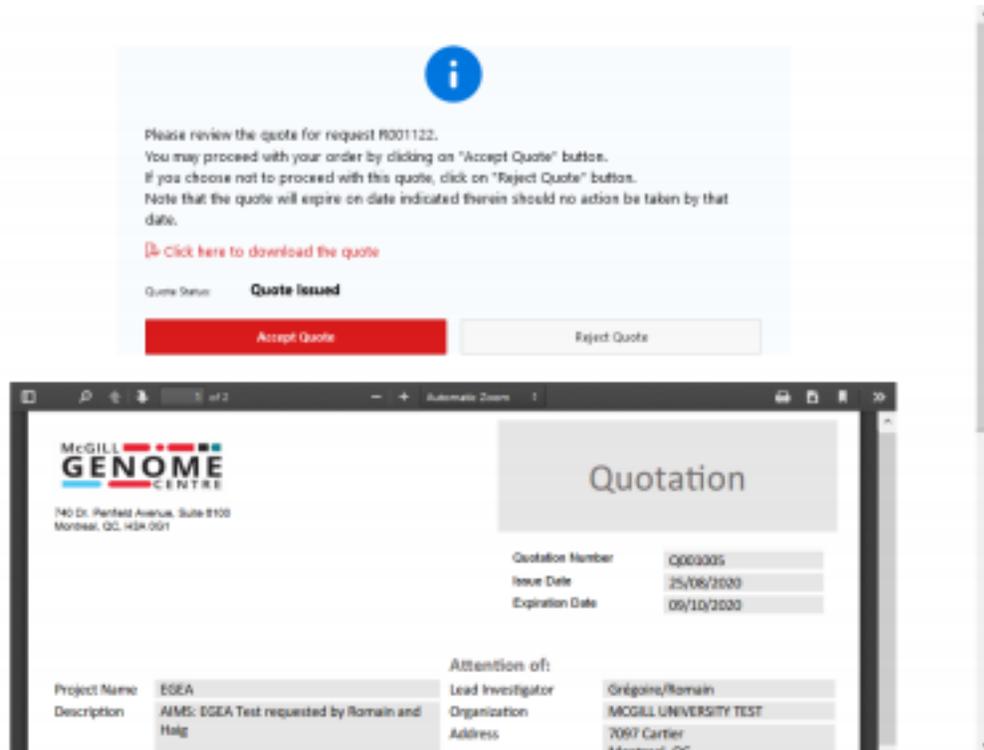
Explain PM processing the request



1. You will receive an email notification informing that a new Quote for your Request has been issued.

2. Login into Hercules.

3. On the **Progress Chart**, click on the **Quote Issued** bar.
4. Clicked on the new **Quote Number**.
5. Review the Quote issued and **Accept** or **Reject** the quote.



Creating the Work Order - Sample Manifest

When accepting a Quote, you will be redirected to the Work Order Detail page. In there follow these steps:

1. Fill up the **Purchase Order** fields and attach any files if necessary.
 - a. If your organisation generates a Purchase Order, please upload it if necessary.
2. Specify if your **samples** are human-derived.
 - a. If samples are human-derived, please upload the Ethics Document(s).
3. Click on the button **Create Sample Manifest** at the bottom right of the page.

Create Sample Manifest

4. The **Work Order Detail** page will open. Fill up the required fields.

5. On the **Sample Manifest** section follow the instructions to specify the number of samples that will be included in the shipment.
6. You can review the Study Design by clicking on the **View Study Design** button on the right of the sample manifest section.
7. If you need to edit any field please click on the **Edit** button in order to be able to make changes.
8. After editing please click on the **Save** button.

HOME | SERVICE REQUESTS | WORK UNDER DESIGN | REQUESTS

Does this work involve any human derived samples? Yes No

Sample Manifest

[View Study Design](#)

Instructions:
For each line in the table below, specify the number of samples that will be included in the shipment ("# Of Samples Shipped") in the last column to the right and click on "Save" before proceeding to the sample manifest file below.

Search: All Test Columns Go Actions

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Workgroup Title	Sample Set Title	Sample Set Description	Sample Type Code	# Of Samples Expected	# Of Samples Shipped
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1 - RM/Long on Remine Novelty	A	NO DESCRIPTION - TEST	RMA	1	
1 rows selected							Total 1

Sample Manifest File

Download Manifest Template [Download](#)

Upload Completed Manifest Document

No Completed Manifest Document

9. Download our **Sample Manifest Template** from the **Download** link.
10. When completing the sample manifest template, please upload it on the **Upload Completed Manifest Document** field.
11. **Submit** by clicking on the **Submit Work Order** button at the bottom right.
 - a. You can choose to **Save for Later** if the work order is not completed.



Creating the Waybill and Shipping

When your work order is received, it is analysed and Approved or Rejected by the Project Manager responsible for your request. An email notification will be sent to you when the work

order is approved (or rejected). The following steps apply when the work order is approved:

1. You can access the approved work order by clicking on the link provided on the email notification, or by login into Hercules.
2. On the **Progress Chart** click on the “**Work Order Approved**” bar.
3. On the Service Request page, click on your **Work Order Number** (WO#####)
4. Review that the information displayed is correct.
5. Click on the **Create Waybill** button at the bottom right of the page.



6. Follow the instructions and specify the **shipment contents** and **shipping quantities**.

The following options are valid.

- a. As specified when submitting the sample manifest, this shipment includes all expected samples and is complete.
 - b. As specified when submitting the sample manifest, this shipment includes a subset of expected samples with more samples to follow in the near future.
7. When completed, click on the **Create Waybill** button at the bottom right of the page.



8. Print the Waybill
9. Follow the instruction from the Waybill:

- a. Where to ship
 - b. How to ship.
10. Attach the waybill when sending your samples




SD001084-Q000886-W0000606

Shipment Waybill

*A signed and dated printout of this waybill **MUST** be included in your shipment.*

INSTRUCTIONS

1) Where to ship ATTN:Reception, Room 200 McGill Genome Centre 740 Doctor-Penfield Ave Montreal, Quebec, H3A 0G1, Canada Tel: (514) 398-1234	2) How to ship This is the 'How To' for shipping samples to the Genome Centre. Testing of URL: http://www.mcgillgenomecentre.ca
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PROJECT INFO

Lead Investigator: Andres Tocasuche	<u>Core</u>	<u>Category</u>
Contact: Andres Tocasuche Tel.		
Project Name: 2_Herc_test		
Quote: Q000886		
Payment type: Purchase Order		
Payment ref. (PO# or other): PO_inter1243		
WO#: W0000606		

SHIPMENT CONTENTS

Carriers	Shipped#	Samples	Shipped#
96-well plates	1	DNA	1
96-well tube rack	1	RNA	1
Tube storage boxes	1	Cells	1
Other approved carrier	1	Other	1

As specified when submitting the sample manifest, this shipment:
 -includes a subset of expected samples with more samples to follow in the near future.

SHIPPER'S ACKNOWLEDGENT

I, Andres Tocasuche, have verified that this shipment is in order and conforms with instructions herein and in guidance documents for sample submission. I understand that failure to do so may result in delays and/or additional fees.



 Signature

2020/08/19

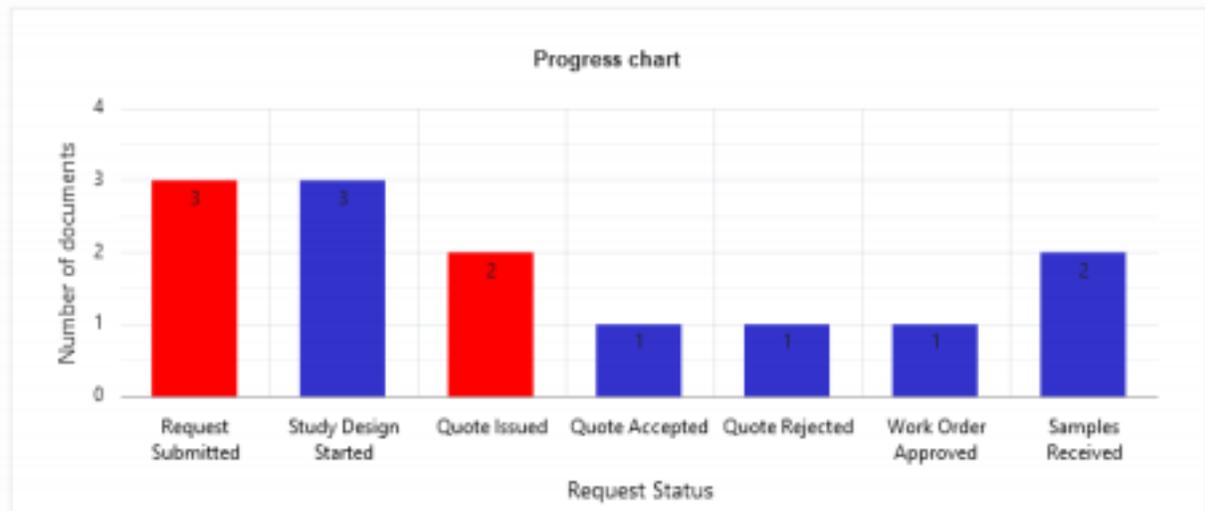
 date

11. The lab will notify you when the shipments are received successfully.

The Progress Chart

[New Request](#)

[Go](#)



The Progress Chart will show the completed and pending steps on the life cycle of a request.

From submitting a Request to Samples received confirmation. Clicking on any of the bars of the will bring you to the page related to the bar.