Discussion Topics

- Current environment
- Program goal
- System features
- Grant management features
- Add facility user
- Link facility user to PI’s Project
- Put project on hold
- Queries to support close-out
- Operational support
- Training overview
- Implementation overview
**Current Environment**

- Separate systems and methods for making reservations and requests across the shared resources
- Difficulty linking grants/fund codes to requests & reservations
- Not integrated with SAP/R3, manual billing processes for most shared resources increases errors
- Delays in posting charges to fund codes
- Users have to be set up on each core and remain as users even after they leave
- No consolidated reporting by grant across all shared resources
- Limited control over code utilization

**Goal**

Provide a centrally supported, enterprise wide, efficient, booking to billing system to support operation of Shared Resources.

This goal will be met by:

- Automating fund code management- download from SAP
- Mechanizing billing and invoicing
- Integrating SAP/R3 to manage JV’s
- Providing robust reporting for core management
- Centralize user profiles across all shared resources, supported by Department
- Reporting for Grant Managers
System Features

• Fund Code Management
  • Auto load of fund codes via SAP
  • Auto creation of PI, FM & GM user accounts
  • Auto link fund codes to PI, FM and GM
  • Auto management of fund code status via SAP
  • Ability to put project/fund code on hold
  • Assignment of memberships and affiliations
  • Linking of users to fund codes

• Billing
  • Direct billing through SAP/R3
  • Automated or manual billing cycles to support close-out
  • Split charges to multiple fund codes
  • Pre-invoice option
  • Review charges to date
  • Review pending charges
  • Auto email invoices to PI and GM

System Features (cont.)

• Booking
  • Instrument reservations
  • Service requests
  • Lab & tool reservations (phase II)
  • Estimates for reservations & services
  • Instrument / tool certification management
  • Notes, 2-way communications

• Access Security
  • NetID and Password
  • Role based security by fund code and privileges
  • Favorites by user
Grant Management Features

- Auto creation of project for each fund code/grant
- Affiliation & membership linking to project/grant/fund code for discounts
- Link students & lab staff to projects/fund codes for accurate billing
- Close out compliance
- Reporting of pending, in process & completed reservations and requests
- Status tracking
- Fund code level reporting
- Consolidated review across multiple fund codes
- Completed reservations & requests
- Pending reservations & requests
- Notes to facility user
- Email notifications
- Safety Officer notifications
- Look up historical invoices

Add Facility User – **Select the PI**
Add Facility User – Choose Add Facility User

Add Facility User – Enter user info / choose user

Select user and click "Select & Continue"
Add Facility User – *Choose Delegate Status and Confirm ‘Add Facility User’*

![Image of Add Facility User page](image1)

**Link User to PI’s Project – *Select the PI’s Project***

![Image of Link User to PI’s Project page](image2)

Time indicator: 30 days prior to Project’s end date
Link User to PI's Project – *Select the Facility User*

![Select User Dialog](image1)

Select the Facility User.

---

Link User to PI's Project – *Choose End Date and 'Add New'*

![Project End Date Dialog](image2)

If desired, enter end date for project access.

---
Put Project on Hold – **Choose project and select On Hold**

Once on hold, the project cannot accept any new Requests or Reservations.
Queries to Support Close-out

Operational Support

<table>
<thead>
<tr>
<th>CoreResearch@Duke</th>
<th>Shared Resources Operational Support Structure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DHTS Service Now</strong></td>
<td><strong>Shared Resource (Core)</strong></td>
</tr>
<tr>
<td>- Password</td>
<td>All Core specific issues</td>
</tr>
<tr>
<td>- Network</td>
<td>- Equipment</td>
</tr>
<tr>
<td>- Account Access</td>
<td>- Calendar/Schedule</td>
</tr>
<tr>
<td></td>
<td>- Facilities</td>
</tr>
<tr>
<td></td>
<td>- Services</td>
</tr>
<tr>
<td></td>
<td>- Split Invoice</td>
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<tr>
<td></td>
<td>- Facility User</td>
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<tr>
<td></td>
<td>- External User</td>
</tr>
</tbody>
</table>
## Training Overview

<table>
<thead>
<tr>
<th>Training Objectives</th>
<th>Core Users</th>
<th>Core Personnel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility Users</td>
<td>Update Profile</td>
<td></td>
</tr>
<tr>
<td>PI and PI-D</td>
<td>Update Profile</td>
<td></td>
</tr>
<tr>
<td>PI-D, GM, and FA</td>
<td>Update Profile</td>
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<tr>
<td>Basic</td>
<td>Access Help</td>
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</tr>
<tr>
<td>PI and PI-D</td>
<td>Access Help</td>
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<td>PI-D, GM, and FA</td>
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</tr>
<tr>
<td>Core Staff</td>
<td>Update Profile</td>
<td></td>
</tr>
<tr>
<td>Core Manager/Director</td>
<td>Update Profile</td>
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<tr>
<td>Access Help</td>
<td>Access Help</td>
<td></td>
</tr>
</tbody>
</table>

### Usage & Operational

- Create quick links
- Manage Estimates (create, edit, cancel, submit)
- Manage Service Requests (create, edit, cancel, submit, and change funding source)
- Reservation (create, edit, cancel, submit, and change funding source)
- Manage Notifications

<table>
<thead>
<tr>
<th>Trainer</th>
<th>ORI &amp; Cores</th>
<th>Regional Office (SOM)</th>
<th>Regional Office (SOM)</th>
<th>ORI</th>
<th>ORI</th>
</tr>
</thead>
</table>

## Implementation Overview

- **Phase 1 Roll-out Schedule: December - April**
  - Genomic Computational Biology Cluster
  - Genomic Computational Biology Integrative Genomics Analysis (Omics)
  - Duke Human Vaccine Institute RBL: Immunology
  - Light Microscopy Core Facility (LMCF)
Implementation Overview (cont.)

• Phase II Participants
  • Small Materials Instrument Facility - Engineering
  • Research Flow Cytometry - DHVI
  • Flow Cytometry Shared Resource - DCI/Immunology
  • Flow Core - CFAR
  • Irradiator Shared Resources (4) - DCI/Radiation Oncology
  • Duke Immersive Virtual Environment - Engineering
  • DNA Biobank - DTMI
  • Center for Applied Genomics Biospecimen Repository - GCB

• Phase II Timeline
  • Requirements specification starts in December
  • Roll-out from mid FY2015-mid FY16

• New Functionality
  • Accounts Receivable
  • Several items deferred from Phase I and small number of new items