



*Institutional Shared Resource Management System*

*Grant Manager Overview  
November 2014*

*Chris Freel, Moria Montalbano*

 **Duke University School of Medicine**  
Duke Office of Research Informatics

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 **CoreResearch@Duke**  
Shared Resources

## 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*

The screenshot shows the LABVANTAGE CoreResearch@Duke interface. The user is logged in as James Fayson, FINANCIAL MANAGER. The main menu includes: Cores, Account Management, Projects, Request For Service, Resource Reservation, Manage Invoice, and Training. The current view is 'Manage PI (PM)'. On the left, there are options for 'Manage Principal Investigator' and 'Manage'. Below these are search filters: 'Search within ID-Name:Net ID', 'Search By Query', 'Search By Category', and 'Search multiple NetIDs'. The main table displays a list of PIs with columns for 'NetID', 'Duke Unique ID', 'Full Name', and 'Email'. A red arrow points to the first row, 'ask4', which is highlighted. A callout box with the text 'Select the PI' is positioned near the arrow.

NetID	Duke Unique ID	Full Name	Email
ask4	0101103	Anthony Kidd (ask4)	anthony.kidd@duke.edu
deb001_pi	021871721	Paul Debien (deb001_pi)	Paul Debien@duke.edu
whi01_pi	2718181	Carolynne Whiting (caw34_pi)	carolynne.whiting@duke.edu
ja16_pi	3457248	Jared Atherton (ja16_pi)	jared.atherton@duke.edu
james_pi	34452338	James Fayson (james_pi)	james.fayson@duke.edu
jrv46_pi	457245245	Joseph Rusanak (jrv46_pi)	joseph.m.rusanak@duke.edu
lsh_pi	628145544	Theagis Lynch (lsh_pi)	theagis.lynch@duke.edu

## Add Facility User – Choose Add Facility User

Manage PI (FM)

Manage PI 0101103

Save \* Return

Maintenance Page Control

User

NetID ask-4 Duke Unique ID 0101103

First Name Anthony Middle Name Last Name Kidd

Full Name Anthony Kidd

Language Duke Status Active

Email anthony.kidd@duke.edu

Facility Users Membership Fund Source Invoice Contacts Projects Study

Duke Unique ID	NetID	Name	PI Delegate?
No records found			

Add Facility User Remove Facility User

View list of users

## Add Facility User – Enter user info / choose user

LABVANTAGE

Close Select & Continue...

Search Bar 1 - 12 of 12 [ 1 selected ]

Search Unique ID/ NetID Name: yee OK

Duke Unique ID	Net ID	First Name	Middle Name	Last Name	E-mail	
<input type="checkbox"/>	0222203	yee00001	Huang	L	Yee	thomas.yee@duke.edu
<input type="checkbox"/>	0273179	mccamyee	Emily	McCamy	emily.mccamy@duke.edu	
<input type="checkbox"/>	0338050	yk41	Yee Ling	Kwan	yee.kwan@duke.edu	
<input type="checkbox"/>	0407435	gya	Gloria	Yayra	Ayee	gloria.ayee@duke.edu
<input checked="" type="checkbox"/>	0434292	ly2	Linton	L	Yee	linton.yee@duke.edu
<input type="checkbox"/>	0450901	wmg9	Wuo	M	Gorgboyee	wuo.gorgboyee@duke.edu
<input type="checkbox"/>	0505068	aay	Antares	Andrew	Yee	antares.yee@duke.edu
<input type="checkbox"/>	0518908	wc88	Wen-Yee		Choi	w.choi@cellbio.duke.edu
<input type="checkbox"/>	0599843	yw94	Yee Weng		Wong	yeeweng.wong@duke.edu
<input type="checkbox"/>	0585917	yh96	Yee Fang		Hum	yeefang.hum@duke.edu
<input type="checkbox"/>	0606219	tkd4	Tyeemia	Kewana	Davis	tyeemiad@yahoo.com
<input type="checkbox"/>	0623958	mahmo02w	Sayeed		Mahmood	sayeed.mahmood@duke.edu

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Select user and click "Select & Continue"

## Add Facility User – Choose Delegate Status and Confirm 'Add Facility User'

The screenshot shows the 'Manage PI (FM)' interface. The 'User' section displays details for Anthony Kidd (NetID: ask4, Duke Unique ID: 0101103). Below this is a 'Facility Users' table with columns for Duke Unique ID, NetID, Name, and PI Delegate?. A red arrow points to the 'PI Delegate?' checkbox for Linton L. Yee (Duke Unique ID: 0434292). A red box with the text 'Determine if PI-delegate' is positioned above the arrow.

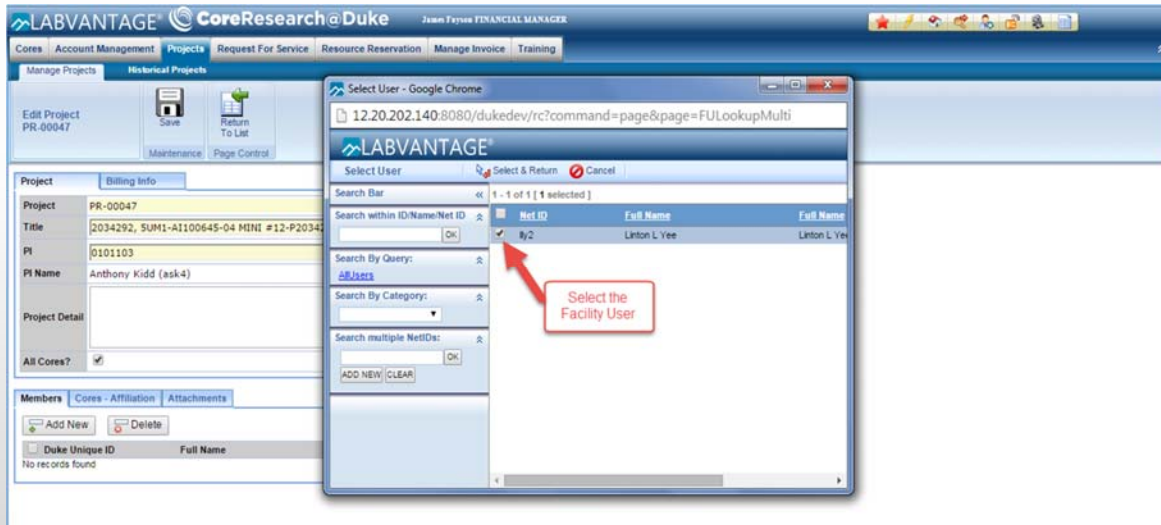
Duke Unique ID	NetID	Name	PI Delegate?
0434292	lly2	Linton L. Yee	<input type="checkbox"/>

## Link User to PI's Project – Select the PI's Project

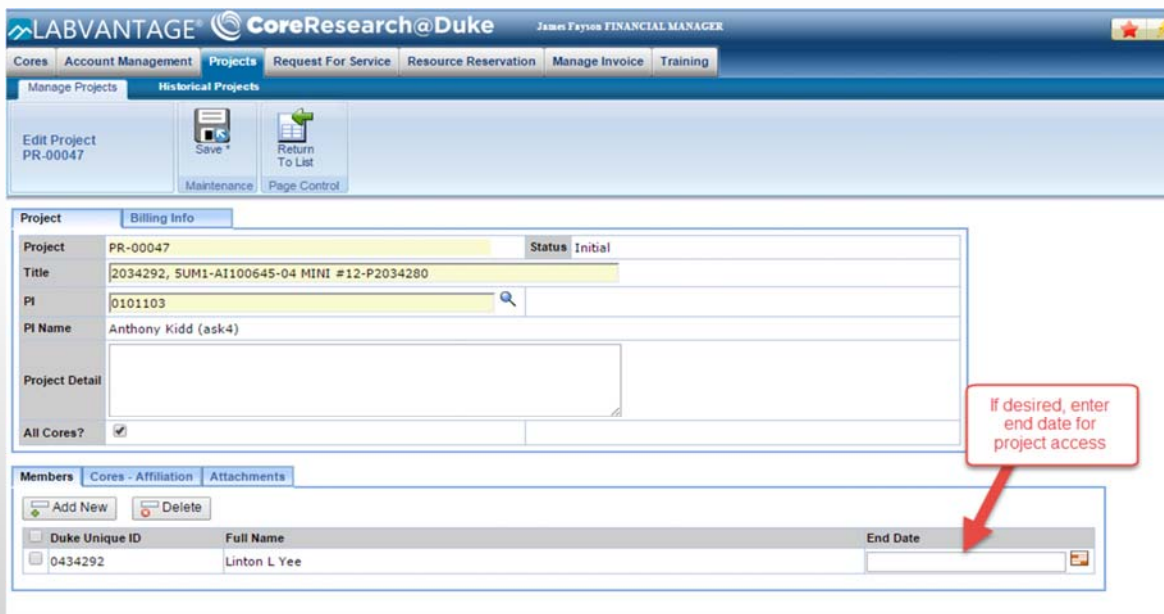
The screenshot shows the 'Manage Projects' interface. A red arrow points to a project selected by PI: 0101103 - Anthony Kidd. Another red arrow points to a '33 days' time indicator. A red box with the text 'Time indicator: 30 days prior to Project's end date' is positioned above the arrow.

Project	Title	PI	Financial Manager	Status	Account Number
<input checked="" type="checkbox"/>	PR-00047	0101103	Anthony Kidd (ask4)	Initial	3893213
<input type="checkbox"/>	PR-00048	0101103	Anthony Kidd (ask4)	Initial	2034292

## Link User to PI's Project – *Select the Facility User*



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



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

The screenshot shows the 'Manage Projects' interface. At the top, there are tabs for 'Manage Projects' and 'Historical Projects'. Below these are several action buttons: 'Add New', 'Edit', 'View', 'Delete', 'Activate', and 'On Hold'. A red arrow points from a callout box to the 'On Hold' button. The callout box contains the text: 'Select the desired project and click the "On Hold" button.' Below the buttons, there is a 'Project List' section with a table of projects. The table has columns for 'Project', 'Title', 'PI', 'Financial Manager 1', 'Status', and 'Account Number'. The second row is selected, and its status is 'Active'.

Project	Title	PI	Financial Manager 1	Status	Account Number
PR-00045	3030411 5R01-AI-40017-05 MECHANISMS OF CD8 & CEL	Anthony Kidd(ask4.)	James Fayson(james_fm.)	Active	3030411
PR-00046	3893213, HHMI 2006 PRECOLL EDUC GRT #51005695	Anthony Kidd(ask4.)	James Fayson(james_fm.)	Active	21 days 3893213
PR-00047	2034292, 5UM1-AI100645-04 MINI #12-P2034280	Anthony Kidd(ask4.)	James Fayson(james_fm.)	Initial	2034292

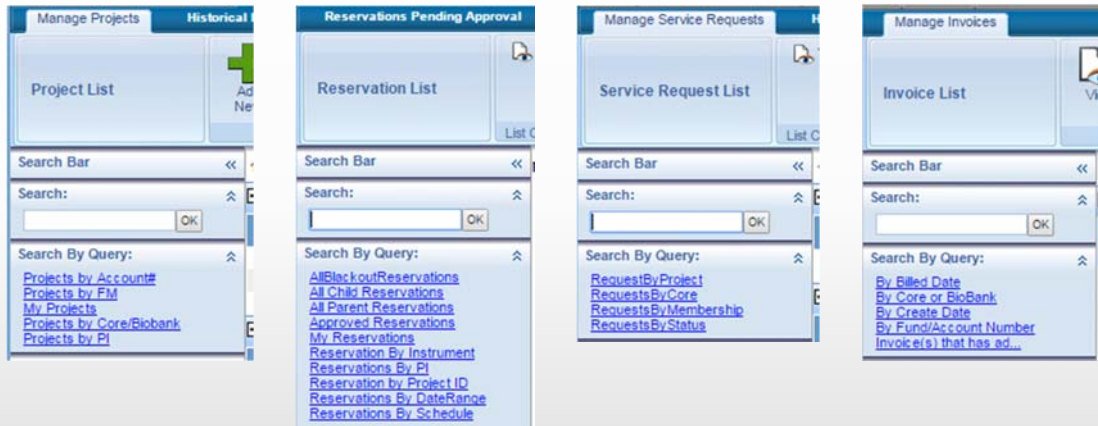
## Put Project on Hold – *Project status indicates On Hold meaning no new requests or reservations*

The screenshot shows the 'Manage Projects' interface. At the top, there are tabs for 'Manage Projects' and 'Historical Projects'. Below these are several action buttons: 'Add New', 'Edit', 'View', 'Delete', 'Activate', and 'On Hold'. A red arrow points from a callout box to the 'On Hold' status of the second row in the project list table. The callout box contains the text: 'Once on hold, the project cannot accept any new Requests or Reservations'. The table has columns for 'Project', 'Title', 'PI', 'Financial Manager 1', 'Status', and 'Account Number'. The second row is selected, and its status is 'On Hold'.


Project	Title	PI	Financial Manager 1	Status	Account Number
PR-00045	3030411 5R01-AI-40017-05 MECHANISMS OF CD8 & CEL	Anthony Kidd(ask4.)	James Fayson(james_fm.)	Active	3030411
PR-00046	3893213, HHMI 2006 PRECOLL EDUC GRT #51005695	Anthony Kidd(ask4.)	James Fayson(james_fm.)	On Hold	21 days 3893213
PR-00047	2034292, 5UM1-AI100645-04 MINI #12-P2034280	Anthony Kidd(ask4.)	James Fayson(james_fm.)	Initial	2034292




## Queries to Support Close-out



## Operational Support

 Shared Resources Operational Support Structure			
DHTS Service Now	Shared Resource (Core)	SOM SR Regional Office	ORI Research Support Services
Access: Phone, ServiceNow Ticket  - Password - Network - Account Access	Access: Phone, Service Now Ticket  All Core specific issues - Equipment - Calendar/Schedule - Facilities - Services - Split Invoice - Facility User - External User	Access: Service Now Ticket  Billing, Invoicing Issues - Rates & Rate Tables - Fund Codes - Reconciliation - Affiliations / Memberships - Discounts - Training PI/FM/GM/FU - Facility User linking	Access: Service Now Ticket  CoreResearch@Duke Issues - Program functionality - Bug resolution - Documentation - Training Shared Resources

## Training Overview

 <b>Shared Resources Training Plan</b>					
Training Objectives	Core Users			Core Personnel	
	Facility Users	PI and PI-D	PI-D, GM, and FA	Core Staff	Core Manager/Director
Basic	<ul style="list-style-type: none"> <li>Update Profile</li> <li>Access Help</li> </ul>	<ul style="list-style-type: none"> <li>Update Profile</li> <li>Access Help</li> </ul>	<ul style="list-style-type: none"> <li>Update Profile</li> <li>Access Help</li> </ul>	<ul style="list-style-type: none"> <li>Update Profile</li> <li>Access Help</li> </ul>	<ul style="list-style-type: none"> <li>Update Profile</li> <li>Access Help</li> </ul>
Usage & Operational	<ul style="list-style-type: none"> <li>Create quick links</li> <li>Manage Estimates (create, edit, cancel, submit)</li> <li>Manage Service Requests (create, edit, cancel, submit, and change funding source)</li> <li>Reservation (create, edit, cancel, submit, and change funding source)</li> <li>Manage Notifications</li> </ul>	<ul style="list-style-type: none"> <li>Link/De-link Facility Users</li> <li>Create PI Delegate</li> <li>Create quick links</li> <li>Manage Notifications</li> </ul>	<ul style="list-style-type: none"> <li>Link/De-link Facility Users</li> <li>Create PI Delegate</li> <li>Create quick links</li> <li>Manage Notifications</li> <li>Manage Projects (put on Hold, etc.)</li> <li>Manage Invoices (view, preview, and summary)</li> <li>Run Queries (pending, completed, funding source status, historical projects, invoices, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>Manage Estimates (create, edit, cancel, submit)</li> <li>Manage Service Requests (create, edit, cancel, submit, and change funding source)</li> <li>Reservation (create, edit, cancel, submit, and change funding source)</li> <li>Manage Notifications</li> <li>Manage Projects (put on Hold, etc.)</li> <li>Manage Invoices (view, preview, and summary)</li> </ul>	<ul style="list-style-type: none"> <li>Manage Estimates (create, edit, cancel, submit)</li> <li>Manage Service Requests (create, edit, cancel, submit, and change funding source)</li> <li>Reservation (create, edit, cancel, submit, and change funding source)</li> <li>Manage Notifications</li> <li>Manage Projects (put on Hold, etc.)</li> <li>Split Charges</li> <li>Manage Invoices (edit, view, preview, and JV Now)</li> <li>Run Utilization Reports</li> </ul>
Trainer	ORI & Cores	Regional Office (SOM)	Regional Office (SOM),	ORI	ORI
Delivery Method	SOP and Step-by-step Documents	SOP and Step-by-step Documents	SOP and Step-by-step Documents	Workshops SOP, and Step-by-step Documents	Workshops, SOP and Step-by-step Documents

## 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