CoreResearch@Duke

Institutional Shared Resource Management System

Grant Manager Overview
November 2014

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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
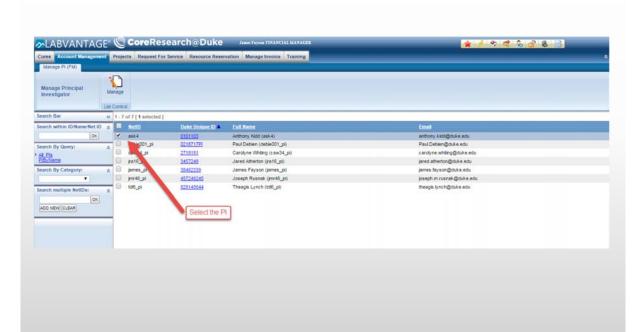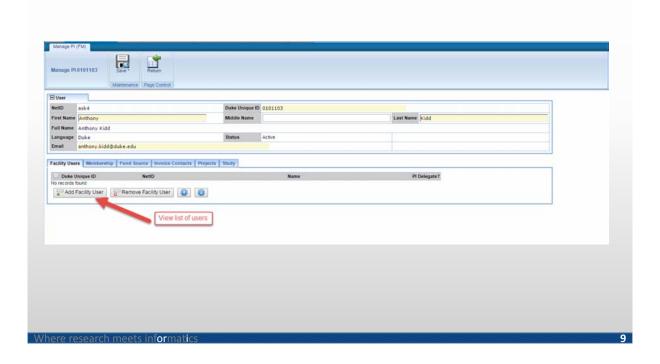- Look up historical invoices

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Add Facility User – *Select the PI*

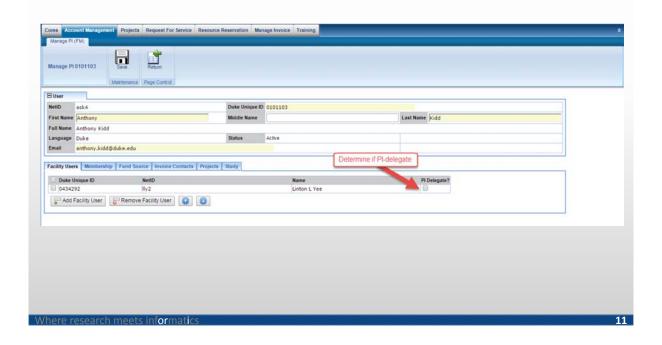# Add Facility User – *Choose Add Facility User*

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

Add Facility User – *Choose Delegate Status and Confirm 'Add Facility User'*
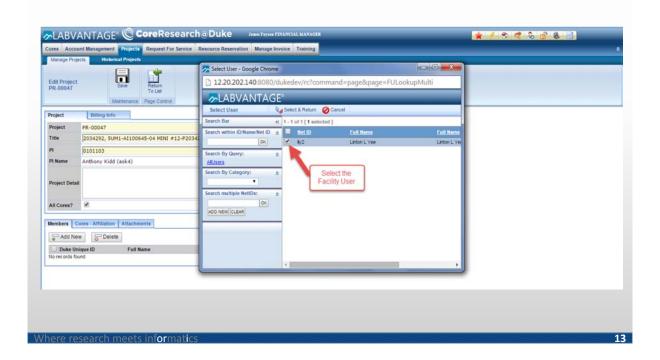
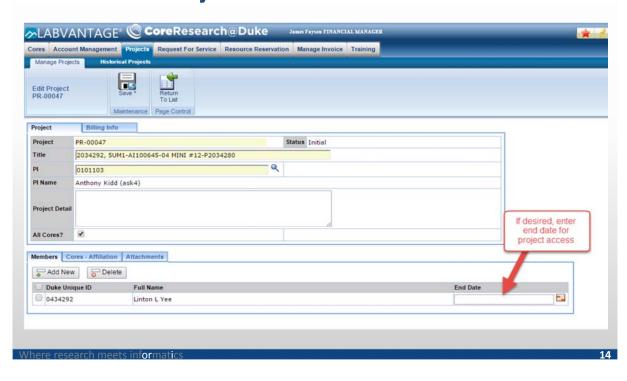## Link User to PI's Project – *Select the PI's Project*

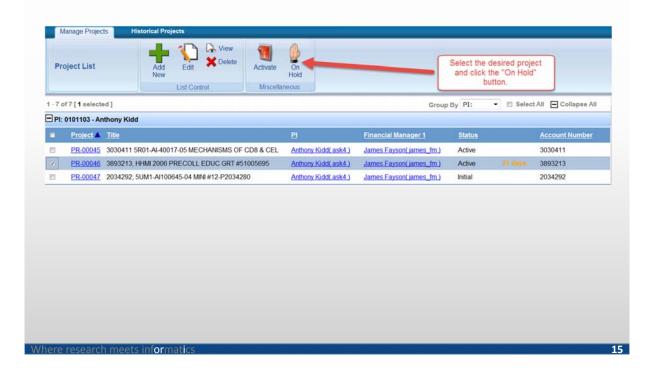Link User to PI's Project – *Select the Facility User*

Link User to PI's Project – *Choose End Date and 'Add New'*
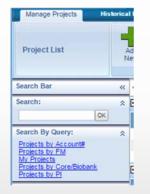
Put Project on Hold – *Choose project and select On Hold*

Put Project on Hold – *Project status indicates On Hold meaning no new requests or reservations*
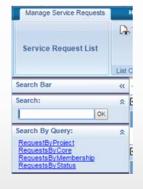
Queries to Support Close-out

Operational Support

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

CoreResearch@Duke — Shared Resources Operational Support Structure

Training Overview

CoreResearch@Duke — Shared Resources Training Plan

Training Objectives	Core Users			Core Personnel	
	Facility Users	PI and PI-D	PI-D, GM, and FA	Core Staff	Core Manager/Director
Basic	• Update Profile • Access Help	• Update Profile • Access Help	• Update Profile • Access Help	• Update Profile • Access Help	• Update Profile • Access Help
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	• Link/De-link Facility Users • Create PI Delegate • Create quick links • Manage Notifications	• Link/De-link Facility Users • Create PI Delegate • Create quick links • Manage Notifications • Manage Projects (put on Hold, etc.) • Manage Invoices (view, preview, and summary) • Run Queries (pending, completed, funding source status, historical projects, invoices, etc.)	• 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 • Manage Projects (put on Hold, etc.) • Manage Invoices (view, preview, and summary)	• 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 • Manage Projects (put on Hold, etc.) • Split Charges • Manage Invoices (edit, view, preview, and JV Now) • Run Utilization Reports
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

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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