Core Management Meeting

Research Resource Program

March 3rd 2021
Agenda

- Welcome!
- RRP Team Introductions
- Panelist: Mike Lee, Executive Director - RRP Leadership Updates
- Panelist: Steve Li, Implementation Associate - iLab Implementation Highlights
- Panelist: Rochelle Kelley, iLab Support Tips and Updates
- Finance Update
- Upcoming Core Related Events
New Team Members

▪ Kasha Hudack, Program Analyst
  • Kasha is the main point of contact for iLab end user support and contributes to other RRP projects
  • Email: Kasha.Hudack@ucsf.edu

▪ Olena Akerman, Finance Manager
  • Responsible for all RRP Recharges and Finance matters
  • Email: Olena.Akerman@ucsf.edu

▪ Michael Hanes, Finance Analyst
  • RRP Finance Analyst, Post Award Analyst
  • Email: Michael.Hanes@ucsf.edu
Additional Team Members

▪ Michael Lee, Executive Director
  • Email: Michael.Lee@ucsf.edu

▪ Rochelle Kelley, Program Manager
  • Email: Rochelle.Kelley@ucsf.edu

▪ Steve Li, Implementation Associate
  • Email: Steve.Li@ucsf.edu
2. Develop expertise and support for management and analysis of big data.
3. Centralize and standardize biospecimen banking across campus.
4. Provide career development support for core research management and staff.
5. Acknowledge and provide support for core activities that are not recharged for.
6. Support the development of current and new researchers.
7. Improve financial management of cores.
8. Consolidate space within and between cores, where appropriate.
9. Promote the availability of all cores and their training programs.

https://rrp.ucsf.edu/roadmap
Mission Statement V2.3

The Research Resource Program (RRP) provides strategic planning, implementation, & operational process improvement, directing investment & maintenance initiatives to leverage core facilities & shared research resources at UCSF, empowering researchers in advancing health worldwide.

Original goals

1) Efficiency improvement: No duplication of existing cores or services.
2) Centralization effort: Move away from individual Departmental Cores and place them under RRP.
3) Reduce faculty burden: Faculty do not need to manage the core.

Updated goals

1) Focus on the campuses.
2) RRP can serve as home, but not a requirement. Determine what Cores need and provide support services.
3) Empower Core staff to take on opportunity. Faculty serve as advisors, freeing up their time to write grants and manage lab.
How to support Cores, Shared Resources & Researchers?

*RRP offers the following support services.*

**Investments**
- Funding Mechanisms
- Education
- Research & Development (Outreach)

**Administrative Operations**
- iLab
- Communications, Website & Marketing
- Maintenance & Improvement
- Core & Shared Resource Classification
- Financial Services
- RRP Cores Operation Support
- Liaison Services
- Events Planning
- User Group Committees (Campus and Technology)
iLab Implementation Highlights

- Successfully implemented all cores from MyCores to iLab in 2019 – 2020
- MyCores officially sunset in Jan 2021
- 9.69 M total core revenue in the past 12 months
- 2,351 total users in the past 12 months
- 407,830 total hours of utilization in the past 12 months

Revenues

9.69 M

Users

2356

Requests

14538

Utilization

407830

- 902.1 K External Revenue
- 8.79 M Internal Revenues
- 9.69 M total revenues in the past 12 months
- 2356 total users in the past 12 months
- 14538 total requests in the past 12 months
- 289103 hours of Maintenance Events
- 118727 hours of Calendar Reservations
- 407830 total hours of utilization in the past 12 months
RRP iLab Site Updated

I'm a iLab User
Information on creating a equipment reservation and requesting services in iLab.

READ MORE FOR iLAB USERS

I'm a Lab Manager
Information on managing a lab, adding users, and assigning speedtypes in iLab.

READ MORE FOR LAB MANAGERS

I'm a Core Administrator
Information on core administrator settings

READ MORE FOR CORE ADMINs

I'm a Biller
Information on creating a billing event

READ MORE FOR BILLER
Stay Up to Date with New iLab Features

Sign up for agilent iLab updates by emailing michaele.preston@agilent.com

**Scheduling**

**Enhancement - Event Notes**
Event notes can now be copied to the associated charge notes. This makes the event notes visible on the invoice and in reporting.
Service Tickets Protocol

Most Common Issues:

▪ **User access** customers need to register, have an active lab association *and* be granted access to a valid speedtype

▪ **Speedtype expiration** date points to the Project end date. Please ask the lab to check with their finance contact to ensure the *project ID is valid*

▪ **Invoice search** When searching CM0-12345 invoices, omit CM0 and input 12345 in the search bar. Need appropriate role to search for invoices

When submitting support tickets remember to:

▪ Decide which support team is appropriate (Refer to support table)

▪ Provide core name, equipment information and details

▪ Provide full P.I name and relevant info such as speedtype etc.
Service Tickets Protocol cont.

There are two different teams to address inquiries in iLab; the UCSF iLab Support team can address many internal inquiries; any external user issues or account updates must be submitted to the Agilent Support team. (*Note: RRP has access to all Agilent tickets and can step in as needed)

<table>
<thead>
<tr>
<th>UCSF Support (<a href="mailto:ilab@ucsf.edu">ilab@ucsf.edu</a>)</th>
<th>Agilent Support (<a href="mailto:ilab-support@agilent.com">ilab-support@agilent.com</a>)</th>
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<tbody>
<tr>
<td>• Speedtype Issues (Expiration, Setup, adding to lab, granting access)</td>
<td>• User log in issues</td>
</tr>
<tr>
<td>• Refund request</td>
<td>• External user registration</td>
</tr>
<tr>
<td>• PO approval</td>
<td>• External user profile updates</td>
</tr>
<tr>
<td>• Core implementation &amp; changes</td>
<td>• Bugs or 'something isn't working'</td>
</tr>
<tr>
<td>• Internal User role updates (Access to invoices, Lab Manager privileges etc.)</td>
<td>• Duplicate accounts, can be merged</td>
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</tbody>
</table>

Core Management Meeting
Gladstone and VA External Users (Dual Appointment)

- Gladstone and VA external users with Dual Appointments need to request or locate their UCSF lab instance in iLab
  - UCSF Lab Instances must be chosen when **internal funds** are available
  - Guide available on RRP Site

- If Gladstone/VA lab does not exist a new lab needs to be created for users to use internal speedtypes. Users may contact ilab@ucsf.edu for help with lab associations
Affiliate Customer Price Tiers

- When **not** using internal funds, ensure the correct price tier is added (Affiliate Rate). Go to -> administration -> Pricing -> Search Affiliate Institution -> Grant Access to appropriate tier (Screenshot below, example: SFVAMC)
- Examples: All UC Campus, SFVAMC, Gladstone
Requesting Usage Data or Invoices from MyCORES

- Email ilab@ucsf.edu with the following information:
  - Provide reference numbers for all invoices (Reference number will begin with RR)
  - Provide MyCORES Core Name and range of Usage data. (Seven years of MyCORES usage data is available for download by RRP only)
RRP Finance Update

- Olena Akerman, Finance Manager – RRP Point Person for:
  - Recharge Preparation

- Mike Hanes, Finance Analyst – RRP Point Person for:
  - RRP BearBuy procurement processing and match exceptions
  - Post Award Analyst for RRP Funding Mechanisms
  - RRP recharge proposal preparation
  - Monthly iLab:
    - Billing events on the 2nd business day each month
    - Invoicing and General Ledger Upload
    - Suspense Corrections
    - Core Fee Calculation and Processing – new rate structure for iLab
Goals for the year

1) Core Classification/Operations Menu
   Update Campus Core Certification process. Focus on operational & financial recovery models. Display as menu of items like legos and build your core with the various pieces.

2) Recharge/financial services
   Work with groups on their budget to figure out actual operational costs.

3) Marketing and communication
   RRP website broad contact list. Make it easy to update and have general info only.

4) iLab maintenance period
   Make sure we can provide support and system works for cores and researchers.

5) Test run of the Core Assistance Fund (CAF) and try to secure funding for Core Award for Research and Development (CARD)
   Based off feedback, improve for next year.
Upcoming Events

- **ABRF Conference**
  - March 7th – 11th, 2021
  - [Register here](#)

- **iLab User Group Meeting**
  - April 13th -14th, 2021
  - [Register here](#)

- **Office Hours - All Users of iLab are welcome to attend!**
  - Every Thursday at 11am (1 hour)
  - [Office hours link](#)
  - One on One appointments may be requested via [iLab@ucsf.edu](mailto:iLab@ucsf.edu)
Virtual Core Fair Brainstorm

- Allot 10 minute slots for cores to showcase
  - Equipment/Services available, updated covid protocols, etc
- Break out rooms based on core technology
Thank you for joining us!

Sign up to receive RRP/Core updates!

*Join the mailing list here*

https://rrp.ucsf.edu/