



University of California
San Francisco

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

RRP Strategic Roadmap

1. Provide funds for investment in Emerging Technologies and State of the Art Equipment.
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

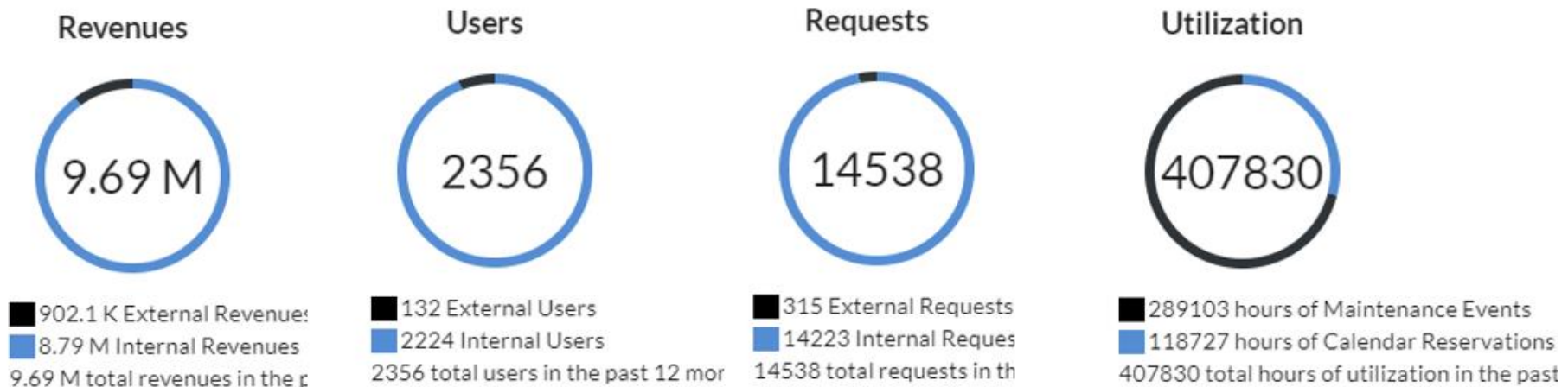
Liaison Services

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



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.

The screenshot shows a reservation details form with three tabs: 'General', 'Comments', and 'Contacts'. The 'General' tab is active. Below the tabs, there is a 'Reservation details' section with a warning icon and the text 'Unsaved reservation - click save reservation'. The details include: 'For: Dissecting Microscope M125 - Room 100 - Davion Considine, (no phone) - (Core: Campus Scientific Store (Product Cores) (UOPH) Lab) - (Unconfirmed)', 'Lab: Core: Campus Scientific Store (Product Cores) (UOPH) Lab', and 'Created on: January 19, 2021 10:02'. There is a text input field with 'hfghfgh' and a dropdown menu for 'Specify the required resource:' set to 'Dissecting Microscope M125 - Room 100'. The 'Event Notes' section has a text area with 'My notes here' and a dropdown menu set to 'note visible to anyone'. A checkbox labeled 'Copy notes to the charge and display on the invoice' is checked and highlighted with an orange box. Below the 'Event Notes' section is a 'Times' section with a table showing 'Scheduled' on 'Jan 20 2021 10:00 AM' to 'Jan 20 2021 12:00 PM'. At the bottom, there are two buttons: 'Save Reservation' and 'Cancel Changes'.

General Comments Contacts

Reservation details ⚠ Unsaved reservation - click save reservation

For: Dissecting Microscope M125 - Room 100 - [Davion Considine](#), (no phone) - (Core: Campus Scientific Store (Product Cores) (UOPH) Lab) - (Unconfirmed)
Lab: [Core: Campus Scientific Store \(Product Cores\) \(UOPH\) Lab](#)
Created on: January 19, 2021 10:02

hfghfgh
Specify the required resource: Dissecting Microscope M125 - Room 100

Event Notes: My notes here note visible to anyone

Copy notes to the charge and display on the invoice

Times

	Start	End	
Scheduled	Jan 20 2021 10:00 AM	Jan 20 2021 12:00 PM	

[Save Reservation](#) [Cancel Changes](#)

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 two different teams to address inquires in iLab; the UCSF iLab Support team can address many internal inquires; 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)

UCSF Support (ilab@ucsf.edu)	Agilent Support (ilab-support@agilent.com)
<ul style="list-style-type: none">• Speedtype Issues (Expiration, Setup, adding to lab, granting access)	<ul style="list-style-type: none">• User log in issues
<ul style="list-style-type: none">• Refund request	<ul style="list-style-type: none">• External user registration
<ul style="list-style-type: none">• PO approval	<ul style="list-style-type: none">• External user profile updates
<ul style="list-style-type: none">• Core implementation & changes	<ul style="list-style-type: none">• Bugs or 'something isn't working'
<ul style="list-style-type: none">• Internal User role updates (Access to invoices, Lab Manager privileges etc.)	<ul style="list-style-type: none">• Duplicate accounts, can be merged

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

UCSF Test Core



[About Our Core](#) [Schedule Equipment](#) [Request Services](#) [Studies](#) [View All Requests](#) [Reservations](#) [People](#) [Reporting](#) [Billing](#) [External Payment \(0\)](#) [Time Entry](#) [Charge Entry](#) [Administration](#)

▼ Pricing

[Control access to prices](#)

Add special price access: (minimum of 3 letters needed for results)

[▼ Search results](#)

1 results for San Francisco VA Medical Center:

Name	Access Level
San Francisco VA Medical Center (institution)	<div style="border: 1px solid black; padding: 2px;">Affiliate share price</div> <ul style="list-style-type: none">InternalExternal not for profitExternal for profit<li style="background-color: #0070C0; color: white;">Affiliate

[existing price permissions](#)

Name (Institute, Lab, Project or Person)	Price Granted	Actions
University of California at San Diego:	Affiliate	✘

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.

RRP Poll Questions

Join at
slido.com
#28927



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

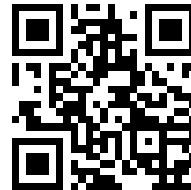
Virtual Core Fair Brainstorm

- 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/>