The SoM Research Administration Advisory Committee (RAAC) is a group of experienced departmental grant managers and central administrators from across the School of Medicine to focus on research administration process improvement and identification of solutions (IT or otherwise) to facilitate improved departmental workflow.

Nominations for members were requested from business managers and central administration leaders. This group is co-chaired by Lisa Varani and Moria Montalbano.

The group began meeting December 12, 2014 and will meet every other week for 1 ½ hours. The first task at hand is process mapping the “As Is” (current) state for Other Support.
Discussion Topics

- Current environment
- Program goal
- System features
- Grant management features
- 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
- No central support
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 via downloads from SAP
• Mechanizing billing and invoicing
• Interfacing with SAP/R3 to manage JV’s
• Providing robust reporting for core management
• Centralized user profiles across all shared resources, supported by Department

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

• 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
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
Implementation Overview

• Phase 1 Live!

• Roll-out Schedule through February 2015
  • Genomic Computational Biology Cluster - Live
  • Duke Human Vaccine Institute RBL: Immunology – February
  • Duke Human Vaccine Institute RBL: Containment– TBD

Implementation Overview (cont.)

• Phase II Participants
  • Light Microscopy Core Facility (LMCF)
  • 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
Implementation Overview (cont.)

• Phase II Timeline
  • Requirements specification underway
  • Roll-out from late FY2015-mid FY16

• Phase II New Functionality
  • Accounts Receivable
  • Reservation enhancements including Reservation by Tool
  • Core based estimates
  • Dozen small enhancements

Implementation Overview (cont.)

• Phase III General Roll-out
  • Implementation of shared resources that fit the profile for the base system
  • Approximately 50 Shared Resources
  • Roll-out to start 4th Q FY2015 through 1st Q FY 2017