Core Managers Meeting

VUMC Office of Research
December 9, 2014
AGENDA

* CORES-to-iLab Transition Timeline
* iLab Application Review
* Vanderbilt iLab Implementation Team
* Expectations During Beta Testing
* Upcoming Meetings & Wave 3+ Implementation
* Credit Cards Functionality in CORES
**CORES-to-iLab Transition Timeline**

**Wave 1**: Kick-off September
- Beta-testing December
- Flow Cytometry, VAPR, & VHTS

**Wave 2**: Kick-off December
- Beta-testing March
- VANTAGE, CISR, & Demo Core

**Wave 3**: TBD (~9 cores per month)

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**Timeline**

<table>
<thead>
<tr>
<th>Q3 2014</th>
<th>Q4 2014</th>
<th>Q1 2015</th>
<th>Q2 2015</th>
<th>Q3 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gap Analysis, Integration &amp; Development</td>
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*Note: Implementation is currently occurring in a Test environment only. The move into Production is pending confirmation.*
iLab Solutions Application Review
About Our Core

- Information about the core.
- Internal & External facing page.
- Viewable by core user & core admin.
- Must login from unique user ID and password to view internally.
Schedule Equipment

- Cores which offer instruments to researchers may use the iLab scheduling module.
- Calendars may be created for each schedulable resource in a core.
- Calendar descriptions, pictures and user access rules can be captured.
- Viewable by core users and core staff.
- Core users will see only ‘View Schedule’ option.
Sample weekly view of a reservation calendar.

Color coded bars represent different pricing for reservations during that time. It can also represent trained user vs. untrained user availability.

Purple reservations represent a future customer reservation.
Request Services

- Viewable by core users and core staff.
- Core users will not see editing tools.
- Project descriptions, pictures and forms can be captured per project.

Cores which are project or service based would take advantage of the "Request Services" tab.

Cores can list the different projects that a customer might request. Once a customer initiates the project, the customer will be asked to complete a form that is built specific to that type of request.

"Services & Rates" is where a core will list all available services that are offered along with their coordinating prices for each price class. The customer sees this section as a read-only 'price-list'. They cannot initiate a service from this lower section and will only see the pricing for the tier they've been assigned.
View All Requests

- Viewable by Core Users and Core Staff.
- Core users will see only the requests they’ve submitted in the queue, they will not see other requests.
View All Request - Continued

- Request details may be viewed by core staff and core user.
- Core staff may communicate with the user, provide a quote or add services to the request.
- Core staff will also process the status of the request.
- Core user would review request for progress and to communicate with the core.
Reservations

- Reservations tab is generally viewable by core staff only, but can be adjusted so core users may view.
- Allows core staff to see bookings across all calendars for any given day.
As noted by the orange heading on the top of the tab, this tab is only viewable to core staff.

- Allows you to generate a list of users who have worked the core.
- Additional features allow trained users and access requests to be managed from here and emails to be sent to select recipients.
As noted by the orange heading on the top of the tab, this tab is only viewable to core staff.

Allows core staff to run reports on data iLab has collected through service charges or reservations.

Charge reporting, Request reporting and Event reporting parameters available.

Numerous filters available to refine reports.
As noted by the orange heading on the top of the tab, this tab is only viewable to core staff.

- Allows core staff to run billing events based on data captured through project requests and calendar reservations.

- Billing files can be generated into drafts and finalized.

- Invoices are available immediately after billing is generated. Bulk send allows invoices to be sent to all PI’s with charges.

- History of billing files and invoices are always available.
Vanderbilt iLab Implementation Team

Jessie Pirtle, Janey Wang, & Seth Martin

**Roles:** Conduct weekly training meetings with core managers/associate, assist with core setup and testing in iLab, serve as liaison between Vanderbilt and iLab, and provide continued user support.

Check OOR website for updated info on implementation schedule, upcoming meetings, training videos, & documents:
[https://medschool.vanderbilt.edu/oor/vanderbilt-cores-%E2%80%93-ilab-partnership](https://medschool.vanderbilt.edu/oor/vanderbilt-cores-%E2%80%93-ilab-partnership)
### Core Implementation Timeline

<table>
<thead>
<tr>
<th>Core completes template</th>
<th>iLab creates core site</th>
<th>iLab incorporates feedback</th>
<th>Core tests and learns iLab</th>
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<th>Core tests and learns iLab</th>
<th>Core tests and learns iLab</th>
<th>iLab provides support</th>
</tr>
</thead>
<tbody>
<tr>
<td>~1 week</td>
<td>2 weeks</td>
<td>1 week</td>
<td>1 week</td>
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### Kick-off
- Explain iLab system to Cores
- Set expectations for implementation
- Provide information gathering template
- Group meeting; all cores in wave attend together

### Info gathering
- Understand current core workflow
- Review gathered information
- Schedule weekly meetings
- Address any questions

### Core review
- Demonstrate modeled functionality
- Gather feedback on further changes (distinguish must-haves / need-to-haves)

### Training 1
- Provide login credentials
- Initial training on iLab workflow
- Review manual and other available resources

### Training 2
- Further training on iLab system
- Tweak configuration as necessary

### Training 3
- Further training on iLab system
- Tweak configuration as necessary

### Training 4
- Further training on iLab system
- Tweak configuration as necessary

### Beta Testing
Expectations During Beta Testing

- User Group Meetings required for beta testers
- 1-hour weekly meetings with Vanderbilt iLab Implementation Team
- 1-hour of independent core module review and testing
- Identify and recruit approximately 10 customers for beta testing
Upcoming Meetings:
User Group Meetings

- Next Meeting: February 10th, 1:30pm (206 PRB)
- Target Audience: beta testers, core managers, lab managers, lab assistants
- Discussion/Demo: functionalities, workflow, new features, idea sharing
Upcoming Meetings: Town Hall Meetings

- Next Meeting: January 28th, 2pm (206 PRB)
- Target Audience: Principal Investigators, Administrative Officers, Admin Assistants, Lab Managers, Lab Assistants, Core Administrators, Departmental Administrators
Credit Cards Processing Functionality in CORES

- December 2014 - Final Month for Credit Card Billing

- Alternative Options
  - Setup own merchant ID and work with PCI Compliance office to obtain required equipment
  - Request customers to use POs, checks, or electronic fund transfers
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Questions?