UT Core Facilities: The Core of the Research Enterprise

Jonathan Phipps, PhD
UT Core Facilities

What Are UT Core Facilities?
Shared Resources offering access to equipment and services to the greater campus community

Who can use a UT Core?
UT Core Facilities are open to all UT faculty, staff, and students

How are facilities supported?
UT Core Facilities recover costs through user fees and non-federal subsidies

What do fees cover?
Direct and allowable costs:
Service contracts, staff salary and benefits, equipment depreciation, lab supplies, misc. operational expenses
Central Mission of UT Core Facilities

**Support:**
Provide the faculty and staff with access to state-of-the-art resources and expert resource scientists

**Community:**
Foster collaborative opportunities and serve a diverse range of faculty

**Education:**
Provide students with experiential learning opportunities through training and access to instrumentation

**Service:**
Serve faculty and external partners while expanding the reputation of the university at the regional, national, and international levels
What are the Current UT Cores?

**Life Sciences**
- Advanced Microscopy
- Bioimaging
- Biological Mass Spectrometry
- Sanger Sequencing Lab
- Next-Gen Sequencing Lab

**Physical and Material Sciences**
- Electron Microscopy
- X-Ray Diffraction
- Micro-Processing Research Facility
- Polymer Characterization Lab
- Electromagnetic Properties Lab
- Advanced Photoemission Spectrometry
- Ion Beam Materials Lab
- Molecular Beam Epitaxy

**Natural Sciences**
- Lab For Environmental Archaeology
- Water Quality Core
- ICP-Mass Spectrometry

**Communications/Computational**
- Advanced Computing Facility
- Bioinformatics resource Facility
- User Experience Lab and Messaging Effects Core
What is the Role of the UT Core Facilities Program?

**Identify Critical Needs:**
Provide a mechanism for strategic growth of the research infrastructure

**Connect Partners:**
Identify potential partnerships among facilities with complementary services

**Increase Awareness:**
Market available resources through web listings, speaking opportunities, and printed materials

**Provide Administrative Support:**
Assistance for organizing facilities, developing business models, and supporting billing and scheduling

**Financial Support:**
Expands capabilities and encourages departments to make resources available to the campus community while lowering costs to faculty
How Do Cores Benefit Faculty?

**Fast track Research:**
Equipment and resource scientists within UT Core Facilities reduce start-up time by providing access to cutting-edge resources and expert consultation.

**Cost Savings:**
By distributing operational costs UT Core Facilities provide access to state-of-the-art resources at affordable rates.

**Outcomes:**
UT Core Facilities provide enhance the capability and capacity of faculty by removing barriers to research, leading to more effective studies and opening new avenues for funding.
How Do Cores Benefit Departments and Colleges?

**Distribute Costs:**
Core Facilities provide a mechanism to bill for costs of operations to faculty from outside the home department as well as to sponsored projects using approve rates.

**New Avenues of Support:**
UT Core Facilities have been at the forefront of recent capital equipment purchases using both internal and external award mechanisms.

**Administrative Burden:**
Participating cores have access to the Stratocore Billing and Scheduling system. Once implemented, Stratocore will allow business offices to minimize effort in recovering user fees.
Billing and Scheduling

Stratocore PPMS:

• Online calendar and service reservation system

• Instantly check account status for internal users (prevents booking without a valid E or R account)

• Quickly create invoices for both internal and external customers

• Once finalized, internal customers are billed automatically through integration with IRIS

• Supporting documentation is easily distributed to financial account managers
Account and Invoice Management

Financial Account management

My managed accounts

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<tr>
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<th>author</th>
<th>start</th>
<th>end</th>
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Request authorization to manage a financial account:

New account management request

Group management

Final invoices

- Invoice ref. PPMS2.JIAM-20190901, account number: E010135044
- Invoice ref. PPMS2.JIAM-20190901, account number: E010135044
- Invoice ref. PPMS3-CEB-20190326, account number: E010135044
- Invoice ref. PPMS3-CEB-20190305, account number: E010135044
- Invoice ref. PPMS2.JIAM-20190301, account number: E010135044
- Invoice ref. PPMS3-CEB-20181211, account number: E010135044
- Invoice ref. PPMS2.JIAM-20181203, account number: E010135021
- Invoice ref. PPMS2.JIAM-20181203, account number: E010135044
- Invoice ref. PPMS3-CEB-20181113, account number: E010135044
- Invoice ref. PPMS3-CEB-20180711, account number: E010135044
Invoicing Workflow

User Creates Order

Business Office generates draft invoice

Work completed by core

Invoice Finalized

Journal File Transmitted to IRIS
Order Creation

Users can quickly order services or book instrument time.
Order Creation

From the Instrument booking screen, users may select a time or multiple times for use. The system reserves the session, and may be set to either bill for the time booked, or adjust using an integrated tracking module.
Order Creation

Order service or consumable

Make this order on behalf of this user:
Phipps Jon

Select a financial account for the order:
E010135044 - default account

Services and consumables available for order (select and enter the quantity values)

<table>
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<th>Service</th>
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For services, uses may select the service and adjust the quantity from the menu.
Core staff may adjust quantities, or add reagent costs as needed. Once the order has been completed, it is available for invoicing.
Invoicing

Invoices are compiled for a given period (business offices may set their own schedules), and totaled. Invoices may be emailed to the responsible party (usually the business manager for the billing account).
Each order is uniquely tagged, and information on the user, time and date of the order, the account billed, as well as a detailed price breakdown may be viewed in Stratocore or exported as an Excel file.
Detailed Records can be used to locate charges and reconcile using IRIS.

Invoicing and IRIS

### Invoice ref PPMS2-JIAM-20190701, detailed summary

#### Autonomous Sessions

<table>
<thead>
<tr>
<th>Account Number</th>
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<th>Sessions</th>
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<th>Final Amount</th>
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#### Assisted Sessions

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**Show more details**

### Invoice ref. PPMS2-JIAM-20190701, details for account number E011315073

#### Autonomous Sessions

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**Summary**

Total charged for autonomous use *(after fees, rebates & subsidies applied)*

**Total amount charged***: 37.50
## Invoicing and IRIS

**Invoice ref. PPMS2-JIAM-20190701, details for account number E011315073**

### Autonomous Sessions

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### Summary

Total charged for autonomous use *(after fees, rebates & subsidies applied)*

| Total amount charged* | 37.50 |

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**Document Overview - Display**

- **Doc. Type**: ZE (Imported Trans Vouch) Normal document
- **Doc. Number**: 2100013858
- **Company Code**: UT
- **Fiscal Year**: 2020
- **Doc. Date**: 07/01/2019
- **Posting Date**: 07/01/2019
- **Period**: 01
- **Calculate Tax**: False
- **Ref.Doc.**: STRATOCORE
- **Doc. Currency**: USD
- **Doc. Edr. Text**: 2-190701E011315073

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Stratocore

Stratocore PPMS:

• New user account requests may be made at https://www.ppms.us/utk

• PIs may create their own lab groups, and add multiple financial accounts for use. Each account may be assigned to specific projects and/or personnel.

• Financial accounts (E or R) may be added during profile creation or after. Integration with IRIS allows Stratocore to check for the validity of the account and prevents billing if the account has expired.

• Departmental accounts may also be used if a unique internal order number is provided for each user

• If you have any questions, please contact Jon Phipps @ jphipps@utk.edu
Questions?