

PENNSTATE



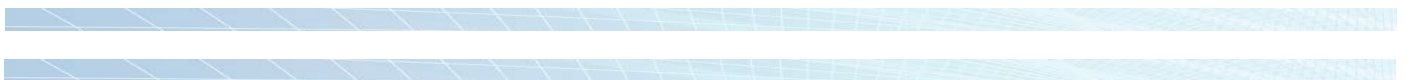
RIMS

RESEARCH INSTRUMENTATION MANAGEMENT SYSTEM

# **RIMS Reference Manual For Facility Users**

**Office of the Vice President for Research**

2013

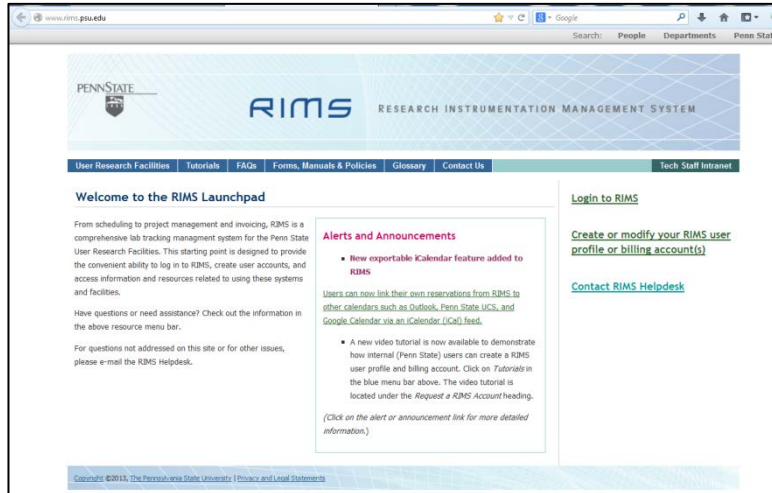


# Table of Contents

<b>Section 1</b>	
RIMS Launchpad .....	1
<b>Section 2</b>	
RIMS System Startup.....	2
<b>Section 3</b>	
RIMS System Main Screen .....	3
<b>Section 4</b>	
RIMS Lab and Equipment Log In/Out.....	4
<b>Section 5</b>	
RIMS Equipment Manager .....	9
<b>Section 6</b>	
RIMS Equipment Reservations.....	10
<b>Section 7</b>	
RIMS Invoice Manager .....	13
<b>Section 8</b>	
RIMS Mailer.....	14
<b>Section 9</b>	
RIMS Product Manager .....	15
<b>Section 10</b>	
RIMS Project Manager .....	17
<b>Section 11</b>	
RIMS Reports.....	19
<b>Section 12</b>	
RIMS To-Do .....	20
<b>Section 13</b>	
RIMS Transaction Manager.....	21

## Section 1 – RIMS Launchpad

**Step 1.1:** In the URL address bar, type [www.rims.psu.edu](http://www.rims.psu.edu) and the RIMS Launchpad screen will be displayed.



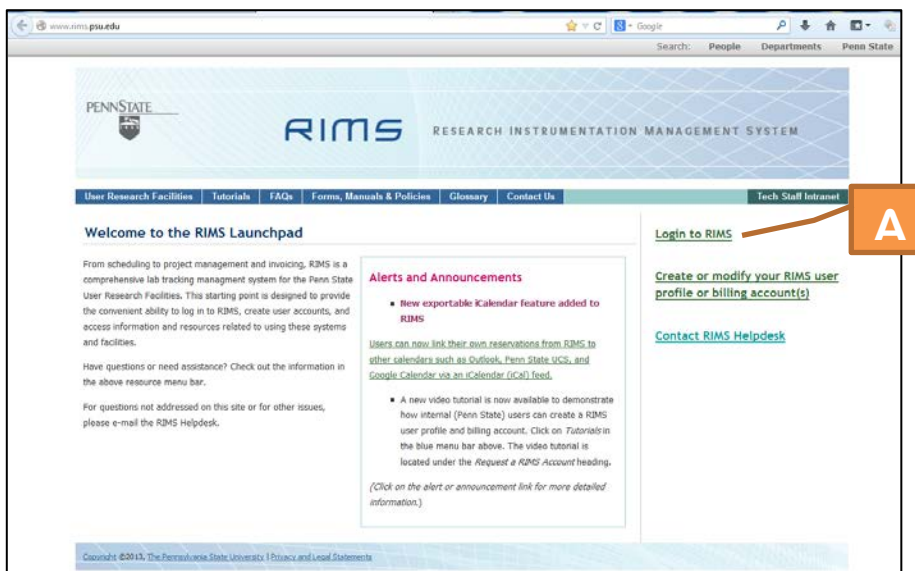
### About The Page Content:

#### Sections of the RIMS Launchpad

User Research Facilities	A list of user research facilities currently utilizing the RIMS system
Tutorials	Tutorials and quickstart guides posted for user reference online
FAQs	Frequently Asked Questions (FAQs) with answers
Forms & Policies	Links to forms and policies applicable to user facilities
Glossary	Glossary of user facilities acronyms and abbreviations
Contact Us	Contact information for user support and technical assistance as well as account billing and payment assistance
Tech Staff Intranet	Link for technical staff intranet
Welcome to the RIMS Launchpad	RIMS narrative message section
Alerts & Announcements box	For posting urgent alerts and important announcements for the user facilities community
RIMS Login Side Bar Link	The login link to access RIMS
Create or Modify your RIMS User Profile or Billing Account(s)	Link to access the User Facilities Information System (UFIS), which is used in conjunction with RIMS to collect user and billing project info for RIMS
Contact RIMS Helpdesk	Link to send an e-mail to the <a href="mailto:rims@psu.edu">rims@psu.edu</a> mailbox

## Section 2 – RIMS System Startup

**Step 2.1** In the right sidebar, click on the grey “Login to RIMS” button under the heading “Already have a RIMS User Account? [A]”



**Step 2.2** Type in your Penn State Access Account ID and Password (Penn State users) or Friends of Penn State Digital Identity and Password (External users) and click on the grey “Login” button.

A screenshot of the WebAccess login page. The page features the Penn State logo and the 'WebAccess' title. Below the title is a 'Help' link. The main content area is titled 'Please enter your Access Account ID or Friends of Penn State ID (e.g. xyz5000)'. It contains a login form with two input fields: 'User ID' and 'Password'. Below the fields is a grey 'Log In' button. To the right of the form is a large fingerprint icon. Below the form are two links: 'Change Access Account Password' and 'Change FPS Account Password'. The footer contains copyright information for 2011 and links to 'Nondiscrimination Policy' and 'Privacy and Legal Statements'.

## Section 3 – RIMS System Main Screen

**Step 3.1** Upon successful login, the RIMS Main Screen that contains a number of smaller portlets by default\* will appear:

- A. Applications dropdown menu to jump to various applications
- B. Settings dropdown menu to view user info, change desktop section layout, and change background image or text size under styles
- C. User Facilities icon – to return “home” to this main screen from other RIMS screens
- D. Message of the Day – for posting messages in addition to the RIMS Launchpad
- E. Lab Time – to log in to Lab Time
- F. Equipment – to log in to Equipment
- G. Lab Tracker – a list of who is logged in to Lab Time in areas
- H. Equipment Tracker – a list of who is logged in to Equipment in areas
- I. Offline Equipment – a list of tools and equipment that are currently offline
- J. Expiring POs – a list of expiring external ARSOs that you may be involved in
- K. Suggestion Box – an opportunity to make suggestions or report trouble

\* Under Settings/Desktop/Layout [B], change layout from default portlets displayed to other portlets available.

The screenshot displays the RIMS System Main Screen with the following components and annotations:

- Header:** PENNSTATE User Facilities RIMS. User: Leeanna Horner. Date/Time: 9/13/2013 11:13 am.
- Navigation:** Applications (A), Settings (B), User Facilities (C).
- Message of the Day (D):** Weekly Nanofab Training Sessions AND MSC Nanofab Orientation. Includes a link to equipment training webpage.
- Lab Time (E):** You are not logged in. Includes a New Login button.
- Equipment (F):** You are not using any equipment. Includes a My Reservations section with a table for scheduling.
- Lab Tracker (G):** 9 users logged in in Cleanroom MSC as of 09/13/2013 11:12 AM. Includes a table of active users.
- Equipment Tracker (H):** 8 users logged in in Lab Space (MCL) as of 09/13/2013 11:12 AM. Includes a table of active users.
- Offline Equipment (I):** Table listing offline equipment with details on duration and expected up time.
- Expiring POs (J):** There are no expiring ARSOs.
- Suggestion Box (K):** Please Choose: Submit A Suggestion, Submit A Trouble Call.

Name	Elapsed Time	Lab
Eichfeld, Chad (cme133)	1 h 54 m	Cleanroom MSC
Johnson, Raegan (rj12)	1 h 59 m	Cleanroom MSC
LaBella, Michael (ml102)	0 h 18 m	Cleanroom MSC
Lavallee, Guy (gpl107)	1 h 45 m	Cleanroom MSC
Liu, Lu (lu117)	2 h 9 m	Cleanroom MSC
Michael, Elizabeth (ekm5129)	0 h 41 m	Cleanroom MSC
Mills, Shaun (slm5291)	3 h 24 m	Cleanroom MSC
Wallace, Margeaux (mlw325)	18 h 18 m	Cleanroom MSC
Zhang, Kehao (kzv5062)	19 h 9 m	Cleanroom MSC

Name	Elapsed Time	Equipment	Lab
Gray, Jennifer (jg375)	2 h 0 m	TEM: Jeol 2010 LaB6	Lab Space (MCL)
Miyagi, Takahira (bkm47)	0 h 54 m	NSOM/Raman/AFM: Witac	Lab Space (MCL)
Smith, Brandon (bhs140)	3 h 24 m	XRD: Rigaku DMAX RAPID	Lab Space (MCL)
Stryer, Megan (mvs5389)	0 h 7 m	XRD: PANalytical XPert Pro MPD	Lab Space (MCL)
Sullivan, Nichole (nfs112)	17 h 43 m	XPS Kratos Ultra	Lab Space (MCL)
Tighe, Tim (tbt1)	0 h 11 m	AFM: Bruker Icon	Lab Space (MCL)
Wonderling, Nichole (nmw10)	72 h 51 m	XRD: Philips Pro MRD 4-Circle	Lab Space (MCL)
Yu, Shih-ying (siy5084)	1 h 20 m	TEM: Jeol 2010F FE-TEM/STEM	Lab Space (MCL)

Equipment	Duration Offline	Expected Up Time	Actions
FIB/SEM FEI Quanta 3D 200	0d 17h 12m	09/13/2013 02:00 PM	View
Flow Cytometer: Beckman Coulter Astrios BSL2 Sorter	0d 2h 42m	09/13/2013 05:00 PM	View

## Section 4 – RIMS Lab and Equipment Log In/Out

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**Step 4.1** Locate the Lab Time and Equipment portlets positioned by default along the left side of the RIMS main screen.

The screenshot shows two portlets. The top portlet is titled "Lab Time" and contains the text "You are not logged in." with a "New Login" button. The bottom portlet is titled "Equipment" and contains the text "You are not using any equipment." and "You must log in to the at least 1 lab. Make sure you log into the correct lab where the equipment is located." Below this is a section titled "My Reservations (for the next 48 hours)" with a table header: "Equipment", "Start Time", and "End Time". Below the table is a dropdown menu showing "1\_Test\_Equipment" and a "Schedule" button.

**Method 4a** *ON THE FLY USE* (without an advance reservation)

**Step 4a.2** Click on the grey "New Login" button in the Lab Time portlet on the main RIMS screen (as shown in screen print in Step 4.1 above)

**Step 4a.3** When the Create New Login for Lab Time appears, choose your billing project from the Project dropdown box, the lab area in which you will be working from the Lab Time dropdown box, enter optional notes in the Notes box if you wish, and then click on the grey "Log In" button to log in to the lab space.

The dialog box contains the following fields: "Project:" with a dropdown menu showing "[432-48 23HN] NNIN Consult (07-026)", "Lab Time:" with a dropdown menu showing "(choose product)", and "Notes:" with a text area. At the bottom are "Log In" and "Cancel" buttons.

**Step 4a.4**

After logging in to the Lab Time, you'll be returned to the RIMS main screen where you will now see and click on the grey "Use Equipment" button in the Equipment portlet (unless you are using a lab space that bills to be in the lab and doesn't have any equipment to log into/be billed for):

The screenshot shows a web interface with two main sections. The top section is titled "Lab Time" and contains the following information:

<b>User</b>	Student, Elaine (eis5183)
<b>Start Date</b>	06/06/2012 08:59 AM
<b>Project</b>	[432-48 23HN] NNIN Consult
<b>Product</b>	Lab Space (MCL)
<b>Actions</b>	<a href="#">Log Out</a>   <a href="#">Switch</a>   <a href="#">Edit</a>

The bottom section is titled "Equipment" and contains the following information:

You are not using any equipment.

**My Reservations (for the next 48 hours)**

Equipment	Start Time	End Time
<input type="text" value="1_Test_Equipment"/>		

**Step 4a.5**

When the Use Equipment screen appears, choose your billing project from the Project dropdown box, the piece of equipment or tool on which you will be working from the Equipment dropdown box (NOTE: only those equipment items/tools that are located in the Lab Space you selected in the previous step will appear in the dropdown box at this time), enter optional notes in the Notes box if you wish, adjust the Estimated End Time date and time to block the length of time you expect to use the equipment/tool on the RIMS calendar, and then click on the grey "Log In" button to log in to the equipment/tool.

The screenshot shows a form titled "Please enter the equipment information." with the following fields:

Project:

Equipment:

Filter by Lab:

Login to Lab

Notes:

Estimated End Time:

**Step 4a.6** After logging in to the Equipment, you'll be returned to the RIMS main screen where you will be able to verify by looking in the Lab Time and Equipment portlets that you successfully logged in to both.

The screenshot shows two portlets on the RIMS main screen. The top portlet is titled "Lab Time" and displays the following information:

- User: Student, Elaine (eis5183)
- Start Date: 06/06/2012 08:59 AM
- Project: [432-48 23HN] NNIN Consult
- Product: Lab Space (MCL)
- Actions: [Log Out](#) | [Switch](#) | [Edit](#)

The bottom portlet is titled "Equipment" and displays the following information:

- User: Student, Elaine (eis5183)
- Start Date: 06/06/2012 10:32 AM
- Project: [432-48 23HN] NNIN Consult
- Product: 1\_Test\_Equipment
- Actions: [Log Out](#) | [Auto Log Out](#) | [Switch](#) | [Edit](#)

Below the Equipment portlet, there is a "Use Equipment" button. Underneath that, there is a section titled "My Reservations (for the next 48 hours)" with a table header:

Equipment	Start Time	End Time
1_Test_Equipment		

At the bottom of the reservation table, there is a dropdown menu showing "1\_Test\_Equipment" and a "Schedule" button.

**Method 4b**

**USING A RESERVATION MADE IN ADVANCE**

*(see Section 6 for information about how to make a reservation in advance)*

**Step 4b.2** Click on the grey "New Login" button in the Lab Time portlet on the main RIMS screen (as shown in screen print in Step 4.1 above)

**Step 4b.3** When the Create New Login for Lab Time appears, choose your billing project from the Project dropdown box, the lab area in which you will be working from the Lab Time dropdown box, enter optional notes in the Notes box if you wish, and then click on the grey "Log In" button to log in to the lab space.

The screenshot shows a form titled "Please enter your lab time information." with the following fields:

- Project: [432-48 23HN] NNIN Consult (07-026) (dropdown menu)
- Lab Time: (choose product) (dropdown menu)
- Notes: (text area)

At the bottom of the form, there are two buttons: "Log In" and "Cancel".



**Step 4b.4** After logging in to the Lab Time, you'll be returned to the RIMS main screen where you will see that the reservation you made in advance listed in the Equipment portlet under the "My Reservations (for the next 48 hours)" heading has now become a link for you to click on.

The screenshot shows two portlets. The top portlet, titled "Lab Time", displays user information: User (Student, Elaine (eis5183)), Start Date (06/06/2012 10:51 AM), Project ([432-48 23HN] NNIN Consult), Product (Lab Space (MCL)), and Actions (Log Out | Switch | Edit). The bottom portlet, titled "Equipment", contains the message "You are not using any equipment." and a "Use Equipment" button. Below this is a section for "My Reservations (for the next 48 hours)" which includes a table with one reservation:

Equipment	Start Time	End Time
<a href="#">1_Test_Equipment</a>	6/6 11:00 AM	6/6 12:00 PM

Below the table is a dropdown menu showing "1\_Test\_Equipment" and a "Schedule" button.

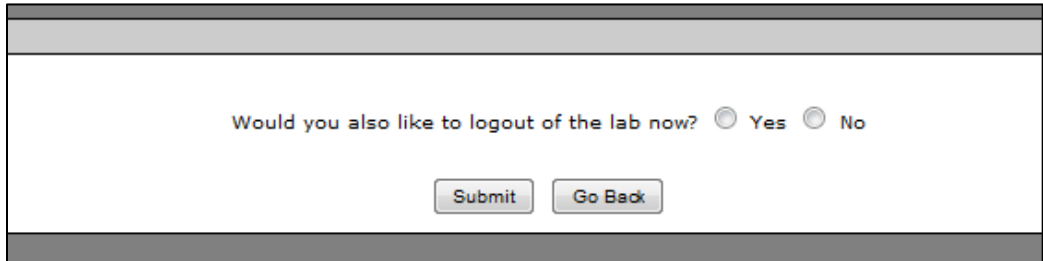
**Step 4b.5** When you click on the equipment link in the My Reservations list, the Use Equipment screen appears. Choose your billing project from the Project dropdown box. The piece of equipment or tool that you reserved will be prepopulated in the Equipment dropdown box. Enter optional notes in the Notes box if you wish, and then click on the grey "Log In" button to log in to the equipment/tool. **NOTE: You have 15 minutes from the start time of your reservation to log in before your reservation is considered as missed and will be cancelled.**

The screenshot shows a form titled "Please enter the equipment information." with the following fields: Project (dropdown menu showing "[432-48 23HN] NNIN Consult (07-028)"), Equipment (dropdown menu showing "1\_Test\_Equipment ()"), Filter by Lab (dropdown menu showing "Logged In Labs"), and a checkbox for "Login to Lab". There is also a "Notes:" label and a text area for entering notes. At the bottom of the form are "Log In" and "Cancel" buttons.

**Step 4b.6** After logging in to the Equipment, you'll be returned to the RIMS main screen where you will be able to verify by looking in the Lab Time and Equipment portlets that you successfully logged in to both.

**Step 4.7**

When you are finished using the equipment (either via an On-The-Fly use or via Advance Reservation), return to a RIMS terminal or web-based computer to access the RIMS main screen again and locate the Actions row of options in the Equipment portal in which Log Out is the first option. When you click on “Log Out”, a screen will display to give you the option to log out of the Lab space also by selecting the Yes radio button.



Would you also like to logout of the lab now?  Yes  No

Click on the grey “Submit” button to return to the RIMS main screen and verify in the Lab Time and Equipment portlets that you are successfully logged out of both.

## Section 5 – RIMS Equipment Manager

### LookUp

*Provides an alphabetical list of equipment in the RIMS system*

- This list is LONG ... use the browser “Find” function (Control-F) for a search box in the lower left corner to help search the lengthy list and then click on “View in the Action column of the Equipment row to open details on the respective equipment item

Equipment	Asset Number	Actions
1_Test_Equipment		
AFM: Bruker Icon	MCL / N030C MSC	
ALD System	Cleanroom MSC ( N-109 / MSC )	
Anneal: Lindberg Blue H Furnace		
Anneal: MRL (black Max)	Cleanroom MRI (Nanofab)	
Anneal: N-type Furnace	Cleanroom MRI (Nanofab)	
Anneal: P-type Furnace	Cleanroom MRI (Nanofab)	
Auger FE Electron Spectrometer	MCL / N031D MSC	
BET: Surface Area Only (MRL)	MCL / N004 MSC	
BET: Surface Area/porosimeter (MRL)	MCL / N007 MSC	
Cluster Tool: Applied Materials (PECVD)	Cleanroom MSC	
Cold Isostatic Press (CIP)	MCL / N137A MSC	
Critical Point Drier: Bal-Tec CPO 030 (Muck)	In Huck: EM Facility	
CW/UV Station	169 MRL Lab Space	
Dicing Saw: ADT 7100 ProVectus	126A MRL Building	
Diffusion: Dry Oxide Furnace	Cleanroom MRI (Nanofab)	
Diffusion: Wet Oxide Furnace	Cleanroom MRI (Nanofab)	
ELTS		
Electrical: 4194A Impedance/Gain-Phase Analyzer	MCL Dielectric Lab (N-221A / MSC)	
Electrical: 4294A Precision Impedance Analyzer	MCL Dielectric Lab (N-221A / MSC)	
Electrical: Cascade Probe Station	MCL Dielectric Lab (N-221A / MSC)	
Electrical: GAD0 1 Hardware	MCL Dielectric Lab (N-221A / MSC)	
Electrical: High Voltage Breakdown/Polarization	MCL Dielectric Lab (N-221A / MSC)	
Electrical: Other 1	MCL Dielectric Lab (N-221A / MSC)	
Electrical: Other 2	MCL Dielectric Lab (N-221A / MSC)	
Electrical: Polarization	MCL Dielectric Lab (N-221A / MSC)	
Electrical: Poling	MCL Dielectric Lab (N-221A / MSC)	
Electrical: Solatrom	MCL Dielectric Lab (N-221A / MSC)	
Electrical: System 1	MCL Dielectric Lab (N-221A / MSC)	
Electrical: System 2	MCL Dielectric Lab (N-221A / MSC)	
Electrical: System 3	MCL Dielectric Lab (N-221A / MSC)	
Electrical: System 4	MCL Dielectric Lab (N-221A / MSC)	
Electroplater: Technic Inc	Cleanroom MRI (Nanofab)	
Ellipsometer: Qwertier	Cleanroom MRI (Nanofab)	
Ellipsometer: Nanoscope	Cleanroom MRI (Nanofab)	
Ellipsometers: Woolam	EEW Cleanroom	
EPMA: SX50 (Hosler)	MCL / Hoeller Building	
EBM FEI: Quanta 200	MCL / N090K MSC	
Etch: Alketal Oxide ORB	Cleanroom MSC	

- Detail view that appears has three tabs [1] General information, [2] Scheduling parameters for reserving the equipment item, and [3] a list of qualified equipment users

**General** | Scheduling | Users | Groups

**Name:** 1\_Test\_Equipment  
**Asset Number:**  
**Description:** An equipment record for testing purposes  
**Inactive?** false  
**Primary Staff:** Lehman  
**Secondary Staff:** Klingler  
  
**Lab:** Lab S

**General** | Scheduling | Users | Groups

**Reservation Group:** No Group  
**Max Days To Schedule Ahead:** using default of 14  
**Min Reservation Hours:** using default of 0.50  
**Max Reservation Hours:** using default of 4.00  
**Min Hours Between Reservations:**  
**Prime Time Hours Per Week:**  
**After Hours Per Week:**  
**Prime Time Hours Per Week:**  
**After Hours Per Week:**  
**Flag If Under Reservation:**  
**Flag If Over Reservation:**  
**Max Open/In-Use Hours Per Week:**  
**Max Minutes for Reservation:**

**General** | Scheduling | Users | Groups

Last Name	First Name
Administrator	Master
Bailey	Rick
Bailey User	Rick
Bailey User2	Rick
Bohn-User	Ryan
Horner	Leeanna
HornerTest	Leeanna
HornerTest2	Leeanna
Klinger	Timothy
Lavallee Test	Guy
Lehman	Dan
Lehman Test User	Dan
Schmell	Matt
Stringer	Scott

OK

## Section 6 – RIMS Equipment Reservations

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### ***Setting Up Your Calendar View for the First Time***

The first time you view the equipment reservation calendar in RIMS following the 4/30/2012 upgrade, you will need to add the equipment items you wish to add to the calendar:

- Under Equipment in the left sidebar, click inside the dropdown box where it says "Type name to add to calendar ..." and begin typing the first few letters of the equipment item that you wish to add to your calendar display list in that left sidebar.
- When the item appears in the dropdown box, click on it to add it to your calendar display list.
- Repeat typing the first few letters of each equipment item you wish to add in the Equipment box until you have added all of the equipment items to your calendar list that you might wish to display on your calendar.
- Once you add an equipment item to your calendar display list, it will remain there until you remove it (see below for instructions for how to remove an item) - even if you log out of RIMS and log back in.
- At any time in the future when you are added as a qualified equipment user to additional equipment items, you can repeat the steps above to add that additional equipment item to your calendar display list.

### ***Adjusting and Customizing Your Calendar Grid View***

- Clicking on the name of any individual equipment item in the list toggles it on and off to display or not display that respective equipment item's reservations on the calendar grid.
- The "Show All | Hide All" options at the top right of the calendar display list will allow you to perform those functions for ALL of the equipment items in the calendar display list.
- To the right of each equipment item in the calendar display list is a down arrow that drops down a menu for that respective equipment item with the following options:
  - New Reservation
  - Display Only This Equipment
  - Display All Listed Equipment
  - Remove Equipment from List
  - Color Palette (MANY colors to choose from to customize colors of your own equipment items)

## ***Making a New Reservation***

### **Method 1: From the Main RIMS screen**

- Under My Reservations in the Equipment portlet, choose the equipment item you wish to reserve from the dropdown list of your qualified equipment use items and then click on the grey Schedule button.
- The Equipment Reservations calendar screen appears with the New Reservation box in the upper left side bar open with the equipment item you selected at the main screen already populated in the Tool field.
- Adjust your start and end dates and times.
- Choose your billing project from the dropdown list of your valid billing projects.
- Click on the grey Save button to create your reservation.
- You will see it appear on the calendar grid.

### **Method 2: From the Equipment Reservations Calendar Screen**

- Click on New Reservation in the Calendar heading bar or click in the day/time area of the calendar grid that you wish to reserve in order to open the New Reservation box in the upper left side bar.
- If the equipment item you wish to reserve isn't the one in the Tool field, choose the item you wish to reserve from the dropdown Tool field box.
- Adjust your start and end dates and times.
- Choose your billing project from the dropdown list of your valid billing projects.
- Click on the grey Save button to create your reservation.
- You will see it appear on the calendar grid.

## ***Editing an Existing Reservation***

- Click on the existing reservation in the calendar grid to open the Reservation Info box in the upper left side bar.
- Click on the grey Edit button at the bottom of the Reservation Info box.
- Adjust the parameters of the reservation as desired.
- Click on the grey Save button at the bottom to save the edited reservations details.
- Click on the grey Close button at the bottom to close the Reservation Info box.
- You will see the revised reservation block appear on the calendar grid.

## ***Exporting a Feed of Your Reservations***

- Click on *Export* in the Calendar heading bar.
- Follow the instructions to download an iCalendar Feed (.ics) of your own equipment reservations.

### ***Reservation Limits***

A user can be granted full privilege to a piece of equipment or probationary privilege.

Probationary limits are:

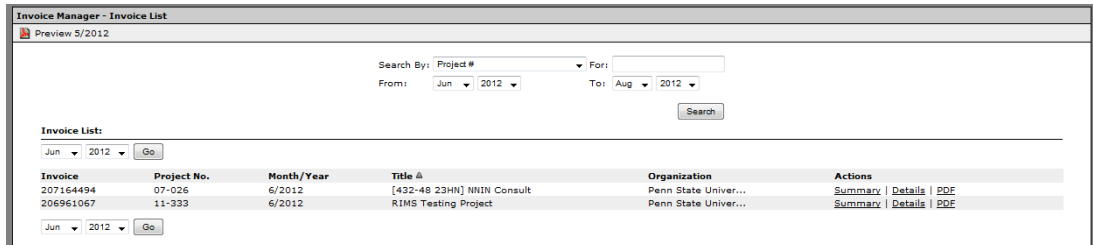
- A probationary user can only make reservations that are entirely between the hours of 8 am to 6 pm Monday through Friday. (i.e.: the reservation cannot be scheduled from 4 pm to 8 pm)
- On-the-fly equipment use (or reserved equipment use that was scheduled to end at 6 pm) will not be cut off at 6 pm. The system will allow the user to complete the session.
- Technical staff CAN make reservations for probationary users outside of primetime and the user WILL be able to log in to the reservation/equipment (contact Technical Staff to make a request)

The Technical Staff also has the ability to control scheduling in other ways that could limit the length of reservation or number of reservations per user per day, during prime time, per week, etc.

## Section 7 – RIMS Invoice Manager

### LookUp

*Provides the ability to review previous monthly invoices or preview partial month invoices prior to billing*



Invoice	Project No.	Month/Year	Title	Organization	Actions
207164494	07-026	6/2012	[432-48 23HN] NNIN Consult	Penn State Univer...	<a href="#">Summary</a>   <a href="#">Details</a>   <a href="#">PDF</a>
206961067	11-333	6/2012	RIMS Testing Project	Penn State Univer...	<a href="#">Summary</a>   <a href="#">Details</a>   <a href="#">PDF</a>

- You can only view invoices of projects for which you have been added by your PI as a qualified project user.
- Adjust the search option fields to search by Project #, Invoice #, PI (Last Name), Performed by (Last Name), or Performed for (Last Name). Enter the search criteria in the “For” box. For example, if you chose Project # in the Search by dropdown box, the “For” box would be the numerical number of your project such as 07-026 or 11-333.
- Adjust the “From” and/or “To” date fields to search for previous monthly invoices. The default is the current month.
- When the search results return, choose either Summary, Details, or PDF in the Actions column of the respective invoice row to view the invoice summary, details, or PDF.
- **RIMS does not contain any overhead charges on external billing (industry, government, and other university).** Overhead is added manually to invoices just prior to being e-mailed to the PI.

## Section 8 – RIMS Mailer

**Step 8.1** If you wish to use the internal RIMS mailer to send an e-mail message, choose Mailer from the Applications dropdown list to display the blank message screen:



**Step 8.2** Click on the grey “To:” button to open the dropdown box of mailer groups available for you to choose as recipients of your message. Users have the following group options available to them in the mailer:

Individual User	Will open up a user search screen to search users by last name and select one to receive the message; can be repeated to send the message to multiple users
Active Qualified Equipment Users	Will open up a dropdown list of equipment items in RIMS for you to select one or many (using Shift/Enter or Control/Enter) so those users qualified for the respective equipment items receive the message
Active Lab Users	All active users who are in the Lab User (on-site ) user group
Active Remote Users	All active users who are in the Remote User (off-site) user group
Active Primary Investigators	All active Primary Investigators (PIs); note that this is both internal and external project PIs
Active Bill To Contacts	Billing projects for all active projects (internal and external projects)
Group	Will open up a dropdown list of groups in RIMS for you to select one or many (using Shift/Enter or Control/Enter) so those in the respective groups will receive the message; note that these are some of the same groups to which mailing is possible in other individual choices in the mailer
Users of (Lab of choice) in Time Frame	Will open up a Time Frame box for you to enter the “Lab of choice” and “From” and “To” dates and select either the Performed For or the Performed By user
All Active RIMS Users Within Time Frame	Will open up a Time Frame box for you to enter “From” and “To” dates and select either the Performed For or the Performed By user
All Active Users	All active users in the RIMS system

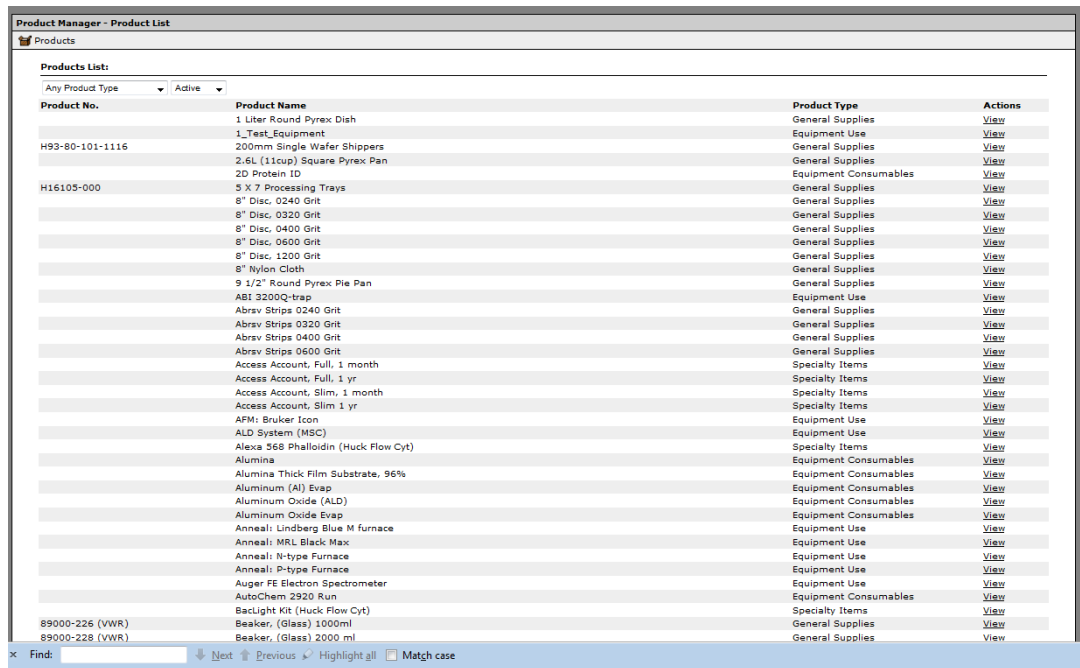


## Section 9 – RIMS Product Manager

### LookUp

**Provides an alphabetical list of products in the RIMS system**

- This list is LONG ... use the Product Type dropdown box at the top of the list to narrow the list to a particular product type:
  - *Equipment Consumable* – runs, samples, metals, consumables, etc.
  - *Equipment Use* – equipment or tools
  - *General Supplies* – general supply items
  - *Lab Time* – charge for the area or lab space
  - *Specialty Items* – specialty items and services
  - *Staff Time* – labor for facilities staff assistance
- Use the browser “Find” function (Control-F) for a search box in the lower left corner to help search the lengthy list and then click on “View in the Action column of the Product row to open details on the respective product item



The screenshot displays the 'Product Manager - Product List' window. At the top, there is a 'Products List:' section with a dropdown menu for 'Any Product Type' and a filter for 'Active'. Below this is a table with the following columns: Product No., Product Name, Product Type, and Actions. The table lists various products such as '1 Liter Round Pyrex Dish', '200mm Single Wafer Shippers', '2.6L (11cup) Square Pyrex Pan', and '2D Protein ID'. Each row has a 'View' link in the Actions column. At the bottom of the window, there is a search bar labeled 'Find:' and navigation buttons for 'Next', 'Previous', 'Highlight all', and 'Match case'.

Product No.	Product Name	Product Type	Actions
	1 Liter Round Pyrex Dish	General Supplies	<a href="#">View</a>
	1_Test_Equipment	Equipment Use	<a href="#">View</a>
H93-80-101-1116	200mm Single Wafer Shippers	General Supplies	<a href="#">View</a>
	2.6L (11cup) Square Pyrex Pan	General Supplies	<a href="#">View</a>
	2D Protein ID	Equipment Consumables	<a href="#">View</a>
H16105-000	5 X 7 Processing Trays	General Supplies	<a href="#">View</a>
	8" Disc, 0240 Grit	General Supplies	<a href="#">View</a>
	8" Disc, 0320 Grit	General Supplies	<a href="#">View</a>
	8" Disc, 0400 Grit	General Supplies	<a href="#">View</a>
	8" Disc, 0600 Grit	General Supplies	<a href="#">View</a>
	8" Disc, 1200 Grit	General Supplies	<a href="#">View</a>
	8" Nylon Cloth	General Supplies	<a href="#">View</a>
	9 1/2" Round Pyrex Pie Pan	General Supplies	<a href="#">View</a>
	ABI 3200Q-trap	Equipment Use	<a href="#">View</a>
	Abrev Strips 0240 Grit	General Supplies	<a href="#">View</a>
	Abrev Strips 0320 Grit	General Supplies	<a href="#">View</a>
	Abrev Strips 0400 Grit	General Supplies	<a href="#">View</a>
	Abrev Strips 0600 Grit	General Supplies	<a href="#">View</a>
	Access Account, Full, 1 month	Specialty Items	<a href="#">View</a>
	Access Account, Full, 1 yr	Specialty Items	<a href="#">View</a>
	Access Account, Slim, 1 month	Specialty Items	<a href="#">View</a>
	Access Account, Slim, 1 yr	Specialty Items	<a href="#">View</a>
	AFM: Bruker Icon	Equipment Use	<a href="#">View</a>
	ALD System (MSC)	Equipment Use	<a href="#">View</a>
	Alexa 568 Phalloidin (Huck Flow Cyt)	Specialty Items	<a href="#">View</a>
	Alumina	Equipment Consumables	<a href="#">View</a>
	Alumina Thick Film Substrate, 96%	Equipment Consumables	<a href="#">View</a>
	Aluminum (Al) Evap	Equipment Consumables	<a href="#">View</a>
	Aluminum Oxide (ALD)	Equipment Consumables	<a href="#">View</a>
	Aluminum Oxide Evap	Equipment Consumables	<a href="#">View</a>
	Anneal: Lindberg Blue M furnace	Equipment Use	<a href="#">View</a>
	Anneal: MRL Black Max	Equipment Use	<a href="#">View</a>
	Anneal: N-type Furnace	Equipment Use	<a href="#">View</a>
	Anneal: P-type Furnace	Equipment Use	<a href="#">View</a>
	Auger FE Electron Spectrometer	Equipment Use	<a href="#">View</a>
	AutoChem 2920 Run	Equipment Consumables	<a href="#">View</a>
	BacLight Kit (Huck Flow Cyt)	Specialty Items	<a href="#">View</a>
89000-226 (VWR)	Beaker, (Glass) 1000ml	General Supplies	<a href="#">View</a>
89000-228 (VWR)	Beaker, (Glass) 2000 ml	General Supplies	<a href="#">View</a>

- Detail view that appears has two tabs [1] Product information and [2] Pricing (current product pricing as well as historical and future pricing)

Product
Pricing

**Name:** 1\_Test\_Equipment  
**Description:** A product record for equipment testing. rkb100  
**Item Number:**  
**Object Code:** 0411  
**Product Type:** Equipment Use  
**Staff Only?** No  
**Inactive?** No  
**Participates in Tier?** No

Product
Pricing

*These charges do not include indirect costs.*  
Unit Of Measure: Hours

**Historical Pricing**

Billing Type	Valid From	Valid To	Per Unit Charge	Min Charge	Max Charge	Daily Cap	Weekly Cap	Monthly Cap	Yearly Cap
Academic	03/01/2008	08/01/2010	0.00	0.00	-	-	-	-	-
Academic	08/01/2010	10/01/2010	0.00	0.00	-	-	-	-	-
Academic	07/01/2011	11/01/2011	0.00	0.00	-	-	-	-	-
Academic	11/01/2010	12/01/2010	0.00	0.00	-	-	-	-	-
Academic	12/01/2010	07/01/2011	0.00	0.01	-	-	-	-	-
Academic	10/01/2010	11/01/2010	0.00	0.00	-	-	-	-	-
Non-Academic	12/01/2010	07/01/2011	0.00	0.01	-	-	-	-	-
Non-Academic	10/01/2010	11/01/2010	0.00	0.00	-	-	-	-	-
Non-Academic	07/01/2011	11/01/2011	0.00	0.00	-	-	-	-	-
Non-Academic	03/01/2008	10/01/2010	0.00	0.00	-	-	-	-	-
Non-Academic	11/01/2010	12/01/2010	0.00	0.00	-	-	-	-	-

**Current Pricing**

Billing Type	Valid From	Valid To	Per Unit Charge	Min Charge	Max Charge	Daily Cap	Weekly Cap	Monthly Cap	Yearly Cap
Academic	11/01/2011		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Non-Academic	11/01/2011		0.00	0.00	0.00	0.00	0.00	0.00	0.00

**Future Pricing**  
No pricing available

## Section 10 – RIMS Project Manager

### LookUp

***Provides a searchable list of your Projects in RIMS***

(a “Project” is a billing account or budget/fund/cost center or grant)

The screenshot shows a web form titled "Project Management - Project List". It contains several input fields for search criteria: Project Title, Project #, Primary Investigator (last name), Co-Investigator (last name), Team Member (last name), Organization, Bill To (last name), PSU Routing #, NSF Staff Category, and NSF Research Area. There are also checkboxes for "No Charge", "Staff Time No Charge", and "Account Verification", and a dropdown menu for "Status" set to "Open Projects". A "Search" button is located at the bottom right. Below the form, the text "Please enter search criteria." is displayed.

- Users can only view Projects to which you have been added by your PI as a qualified project user.
- Various search fields are available in the Project Manager for you to use to search for projects (title, project #, PI, etc.); in this example, we've used PI to return the search result desired.

The screenshot shows the same search form as above, but with search results displayed below. The "Primary Investigator (last name)" field is filled with "mansfield". The search results table is as follows:

Project No.	Title ▲	PI	Organization	Billing Type
07-026	1432-48 23HN1 NNIN Consult	Mansfield, William	Penn State Univer...	Academic

- Click on the Project No. or Title in the search results list to open details on the respective project.

- Detail view that appears has three tabs [1] Project information, [2] a list of qualified users on the project, and [3] Budget information:

The screenshot shows a web interface with three tabs: "Project", "Users", and "Budget".

**Project Tab:**

- Project No: 07-026
- Title: [432-48 23HN] NNIN Consult
- Start Date: 02/15/2007
- End Date:
- Primary Investigator: William Mansfield (wmm14)
- Co-Investigator:
- Bill To: Monica Grubb
- Organization: Penn State University
- NSF Research Area: Staff (No NSF reporting)
- NSF Staff Category: Local Users
- User Facilities Reporting Type:
- Department:
- Budget & Fund:
- Cost Center:
- No Charge:
- Notes:

**Users Tab:**

- Ted Gehoski (twg11)
- Changjun Huang (cuh11)
- William Mansfield (wmm14)
- Elaine Student (eis5183)

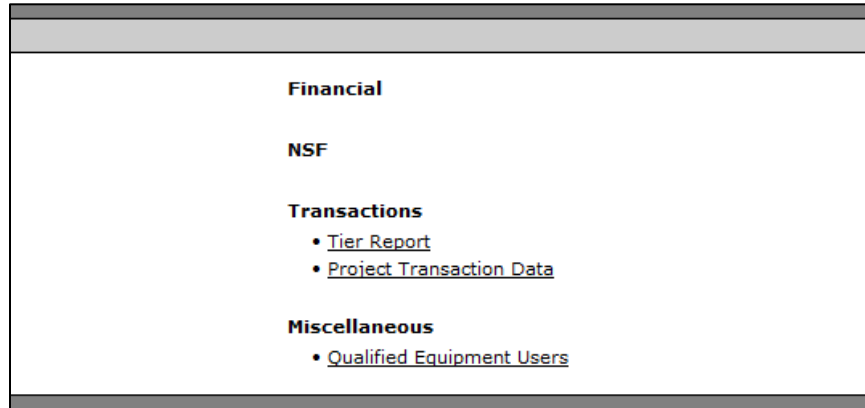
**Budget Tab:**

- PSU Routing No: 0403248 UP23HN0

## Section 11 – RIMS Reports

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**LookUp** Reports available in RIMS for users to pull on a real-time basis are under Reports in the Applications dropdown list



### ***Project Transaction Data Report***

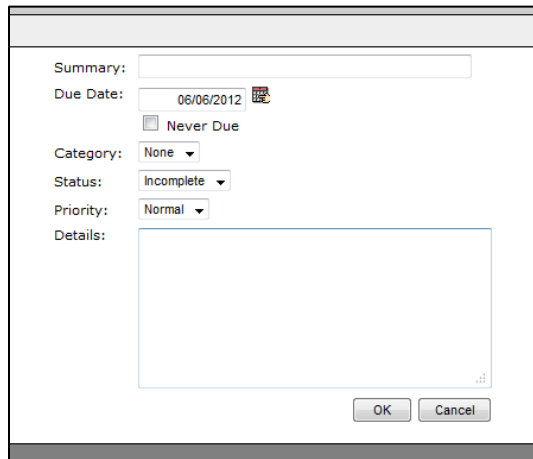
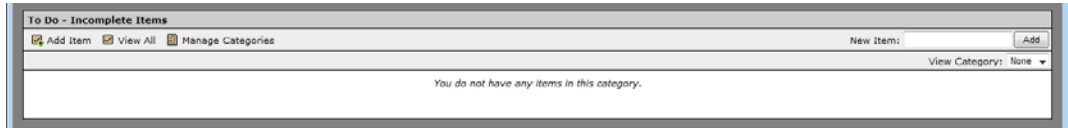
- This report provides the ability to view the entire period of a project, as opposed to only a month at a time (via Invoice Manager). The information on this report is consistent with data that appears on the invoices (i.e.: after billing, with credits applied). This report does not include overhead.

## Section 12 – RIMS To-Do

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### **EXTRA**

An internal To-Do list is available in RIMS if you wish to track to-do items using the system. The items don't necessarily need to be RIMS related. This is just a special extra, convenient feature built into the RIMS system.



The screenshot shows a form for creating a new to-do item. The fields are as follows:

- Summary: [Empty text box]
- Due Date: 06/06/2012 [Calendar icon]
- Never Due
- Category: None [Dropdown arrow]
- Status: Incomplete [Dropdown arrow]
- Priority: Normal [Dropdown arrow]
- Details: [Empty text area]

At the bottom right, there are "OK" and "Cancel" buttons.

## Section 13 – RIMS Transaction Manager

### LookUp

Provides the ability to review transaction activity (historical for reference or preview transactions prior to monthly billing); you can only view your own transactions

The screenshot shows the 'Transaction Manager - Search' window. It features a 'Jump To Transaction' link and several search criteria fields: 'Performed For' (any user), 'Performed By' (any user), 'Project' (any project), 'Status' (Any), 'Product Type' (any), 'Product' (any), 'Time Frame' (From and To date pickers), and 'Using' (Start Date). Search and Cancel buttons are at the bottom right.

- Adjust the search options field to search by your name (Performed For), a staff member who did the work for you (Performed By), your billing project (Project), Product Type and/or Product Name (i.e., Lab Time and Machine Shop), and Time Frame. The more search criteria you fill in, the more narrow your search results will be.

The screenshot shows the search results for the criteria entered above. The search criteria are: Performed For: Student, Elaine (eis5183); Performed By: (any user); Project: [432-44 4353 AC REL] AC Reliability (09-283); Time Frame: From 06/05/2012 To 06/06/2012. The results table is as follows:

Number	Performed By	Performed For	Start Date	End Date	Project No.	Product Type	Product	Units	Billed	Actions
207155237	Student, Elaine	Student, Elaine	6/5/12 01:35 PM	6/5/12 03:01 PM	09-283	Equipment Use	FESEM: NanoSEM 630	1.73 hrs	\$ 69.20	<a href="#">View</a>
207155235	Student, Elaine	Student, Elaine	6/5/12 01:34 PM	6/5/12 02:19 PM	09-283	Lab Time	Lab Space (MCL)	0.75 hrs	\$ 0.00	<a href="#">View</a>
<b>Page Subtotal:</b>									\$ 69.20	
<b>Grand Total:</b>									\$ 69.20	

- When the search results return, choose View in the Actions column of the respective transaction row to view the transaction in a full-screen format (or to print the transaction screen to mark up and send (either in electronic format or hardcopy to the technical staff or [RIMS@psu.edu](mailto:RIMS@psu.edu) address) to request an edit to the transaction prior to billing closing on the 5<sup>th</sup> working day of the next month.

The screenshot shows the 'Transaction Manager - Edit Transaction' window. It has tabs for 'General' and 'Audit'. The 'General' tab is active, showing transaction details: Performed For: Student, Elaine (eis5183); Performed By: Student, Elaine (eis5183); Project: [432-44 4353 AC REL] AC Reliability (09-283); Product Type: Equipment Use; Product: FESEM: NanoSEM 630 (); Units Used: Hours; Number of Units: 1.73. A 'No Charge' checkbox is checked. The amount to be billed is \$ 69.20. The date/time is 06/05/2012 1:35 PM. A note indicates 'This transaction is closed.' There is a 'Cancel' button at the bottom right.