# RIMS Reference Manual
# For Facility Users

**Office of the Vice President for Research**

2013
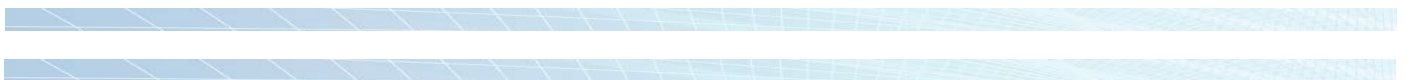
# Table of Contents

**Section 1 – RIMS Launchpad**

***Step 1.1:*** In the URL address bar, type www.rims.psu.edu and the RIMS Launchpad screen will be displayed.
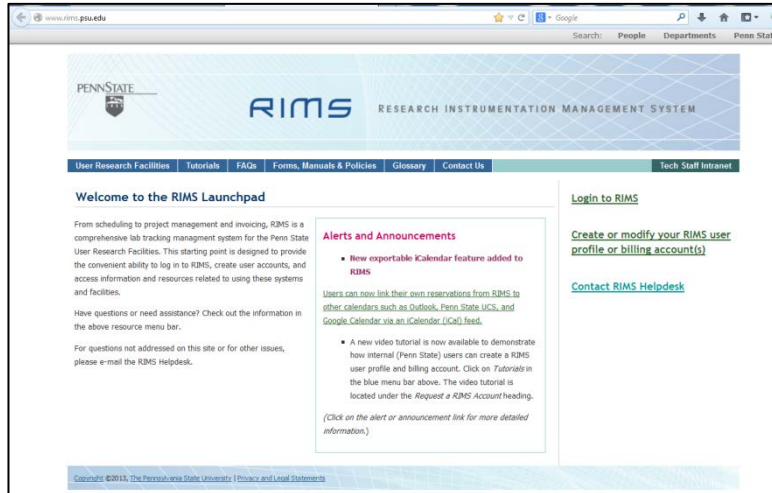


***About The Page Content:***

**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 rims@psu.edu 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]
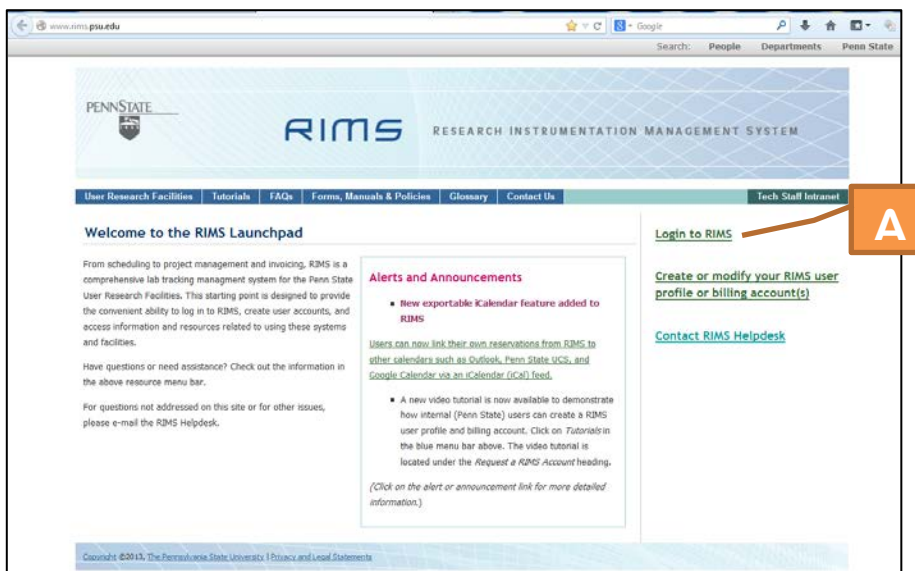


***Step 2.2***        Type in your Penn State Access Account ID and Password (Penn State users) or Friends of Penn State Digital Identity and Password (External users) and click on the grey "Login" button.

# 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.

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

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



**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.

**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):



**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.

***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.

**Lab Time**

| | |
|---|---|
| **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 |

**Equipment**

| | |
|---|---|
| **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 |

[ Use Equipment ]

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

| Equipment | Start Time | End Time |
|---|---|---|

[ 1_Test_Equipment ▼ ] [ Schedule ]

***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.

Please enter your lab time information.

| | |
|---|---|
| Project: | [432-48 23HN] NNIN Consult (07-026) ▼ |
| Lab Time: | (choose product) ▼ |
| Notes: | |

[ Log In ] [ 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 portel under the "My Reservations (for the next 48 hours)" heading has now become a link for you to click on.

**Lab Time**

| | |
|---|---|
| User | Student, Elaine (eis5183) |
| Start Date | 06/06/2012 10:51 AM |
| Project | [432-48 23HN] NNIN Consult |
| Product | Lab Space (MCL) |
| Actions | Log Out | Switch | Edit |

**Equipment**

You are not using any equipment.

[ Use Equipment ]

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

| Equipment | Start Time | End Time |
|---|---|---|
| 1_Test_Equipment | 6/6 11:00 AM | 6/6 12:00 PM |

[ 1_Test_Equipment  ▼ ] [ Schedule ]
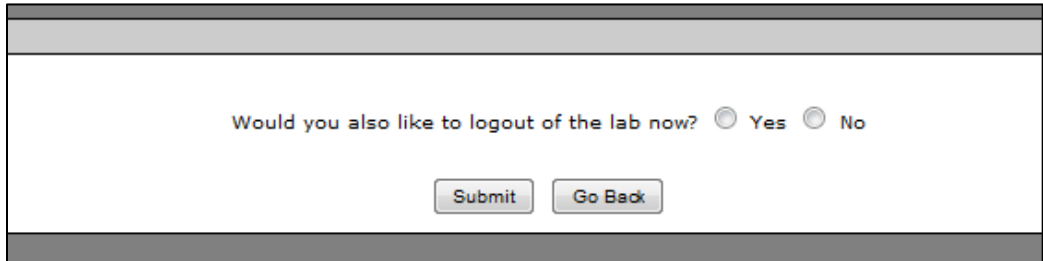
**Step 4b.5**    When you click on the equipment link in the My Reservations list, the Use Equipment screen appears. Choose your billing project from the Project dropdown box. The piece of equipment or tool that you reserved will be prepopulated in the Equipment dropdown box. Enter optional notes in 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.

Please enter the equipment information.

| | |
|---|---|
| Project: | [432-48 23HN] NNIN Consult (07-026)  ▼ |
| Equipment: | 1_Test_Equipment ()  ▼ |
| Filter by Lab: | Logged In Labs  ▼ |
| | ☐ Login to Lab |
| Notes: | [          ] |

[ Log In ] [ Cancel ]

**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.



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



- 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

**Section 6 – RIMS Equipment Reservations**

*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 dropdrown 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:
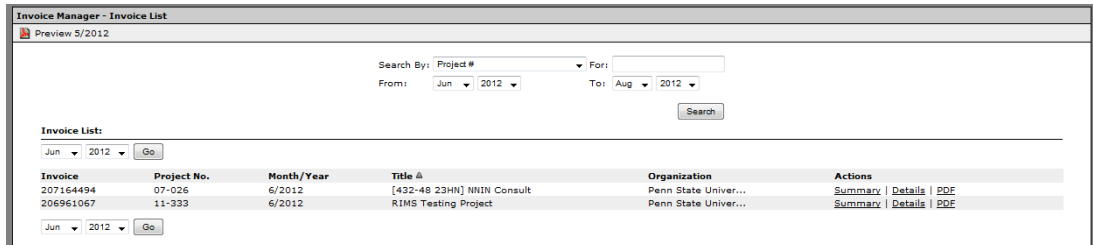
- A probationary user can only make reservations that are entirely between the hours of 8 am to 6 pm Monday through Friday.  (i.e.: the reservation cannot be scheduled from 4 pm to 8 pm)
- On-the-fly equipment use (or reserved equipment use that was scheduled to end at 6 pm) will not be cut off at 6 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*



- 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:

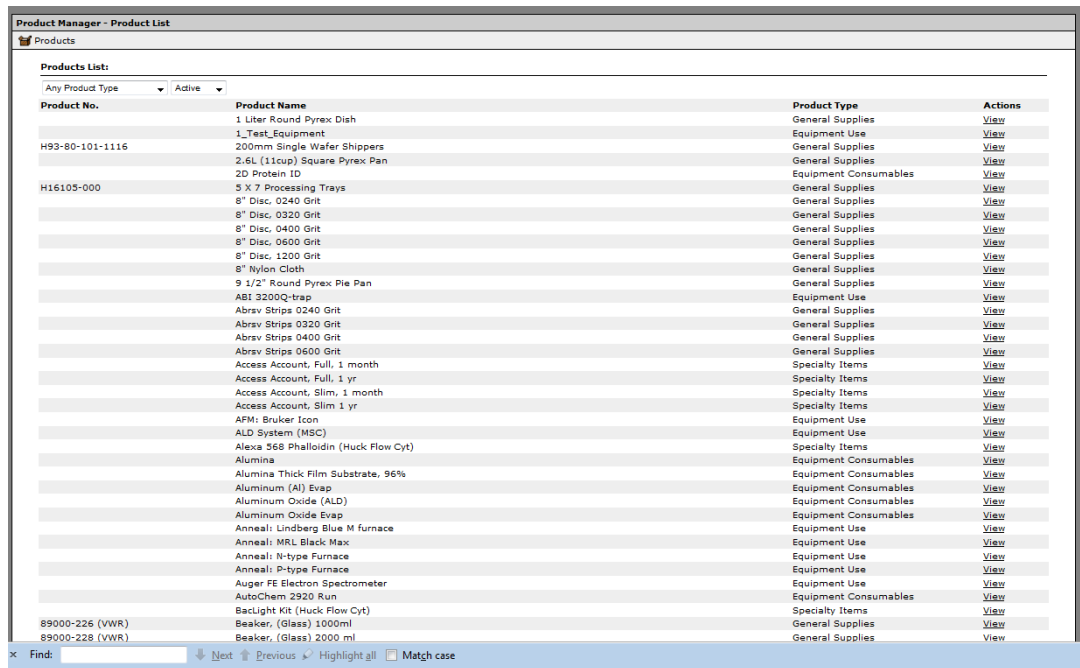| | |
|---|---|
| Individual User | Will open up a user search screen to search users by last name and select one to receive the message; can be repeated to send the message to multiple users |
| Active Qualified Equipment Users | Will open up a dropdown list of equipment items in RIMS for you to select 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

- 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 | 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 | 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)

**Project Management - Project List**

| | |
|---|---|
| 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: | NSF Research Area: |
| Status: Open Projects | ☐ No Charge ☐ Staff Time No Charge ☐ Account Verification |

Search

*Please enter search criteria.*

- 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.

**Project Management - Project List**

| | |
|---|---|
| Project Title: | Project #: |
| Primary Investigator (last name): mansfield | Co-Investigator (last name): |
| Team Member (last name): | Organization: |
| Bill To (last name): | PSU Routing #: |
| NSF Staff Category: | NSF Research Area: |
| Status: Open Projects | ☐ No Charge ☐ Staff Time No Charge ☐ Account Verification |

Search

| Project No. | Title △ | PI | Organization | Billing Type |
|---|---|---|---|---|
| 07-026 | [432-48 23HN] 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:

| Project | Users | Budget |
| --- | --- | --- |

| 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: | |

| Project | Users | Budget |
| --- | --- | --- |

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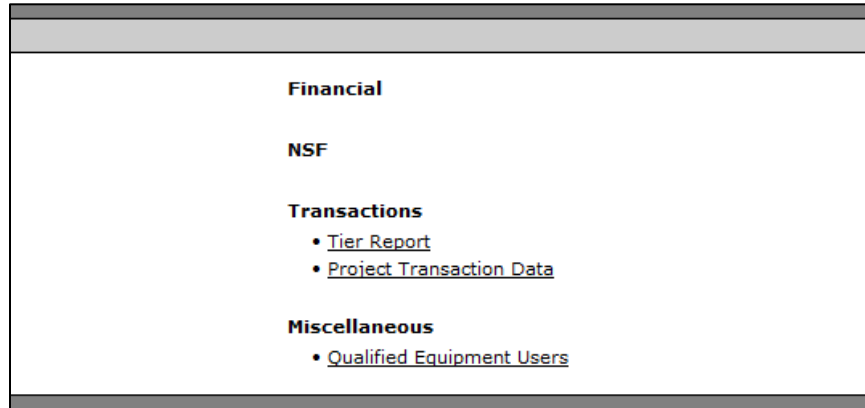Elaine Student (eis5183)

| Project | Users | Budget |
| --- | --- | --- |

PSU Routing No: 0403248 UP23HN0

**Section 11 – RIMS Reports**

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

**Financial**

**NSF**

**Transactions**
- Tier Report
- Project Transaction Data

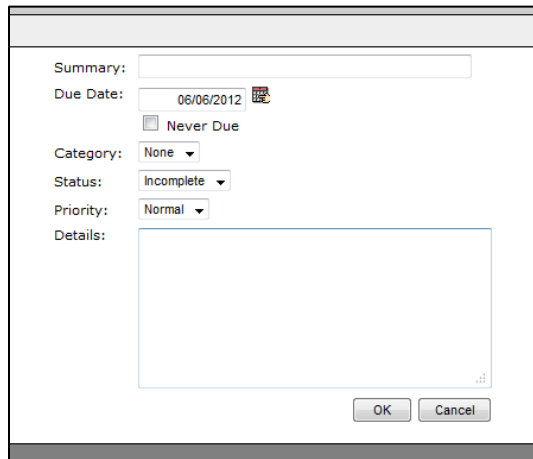**Miscellaneous**
- Qualified Equipment Users

*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

***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.
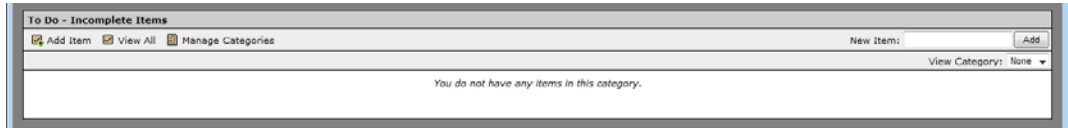
## Section 13 – RIMS Transaction Manager

***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



- 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 you search results will be.



- 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 address) to request an edit to the transaction prior to billing closing on the 5<sup>th</sup> working day of the next month.