FACULTY OF MEDICINE AND HEALTH SCIENCES

CFMS BASICS FOR PI'S

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INTRODUCTION

The CFMS (Core Facility Management System) is the logistic backbone of the UGent core facilities operations. The CFMS handles labs, users, instrument scheduling and invoicing.

The target audience of this document are the Principal Investigators and their Lab Admin Alternatives.

Disclaimer

This document is not intended to be a comprehensive user manual for the CFMS. Instead, it provides a practical, hands-on guide covering the basic functionality and everyday use of the system.

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CONTENT

The main topics covered:

- Lab creation
- User registration
- Log in
- Setting up the lab
- Adding users
- Handling invoices

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LAB SETUP

To use the CFMS system as Principal Investigator, a lab must exist for the PI in the CFMS. If that is not the case, you need to request the creation of a new lab.

Each created lab has a Lab Type which determines invoicing details and is determined by cost drivers like personnel cost, device cost, maintenance cost, consumables, VAT, overhead and client type.

There are two client types:

Internal users

UGent users, they are exempt from VAT and overhead.

External users

Non-UGent users, they are due VAT and overhead*.

* except for some Strategic Research Centers (SOC) from UGent

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LAB TYPES

The most common lab types are listed belows.

Type nr	Description	Client Type	VAT	Overhead
Type 01	Internal Academic	Internal	no	no
Type 07	European funded	Internal	no	no
Type 17	External Academic Industry sponsored UZGent	External	yes	yes (except SOC)
Type 23	European funded	External	no	no

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LAB CREATION

For internal users (UGent only)

Send an email to cfms@ugent.be with

- PI email address
- WBS Element code
- Fund Code (I, II, III, IV1, IV2, IX1, IX2, IX3, V)
- Lab Type (see list)

For external users (non UGent)

Send an email to cfms@ugent.be with PI email address with

- Name of the lab/department/company
- Lab Type: The Lab Type (see list)

The CFMS Facility Admin will automatically be added as Lab Admin Alternative for assisting setting up the lab.

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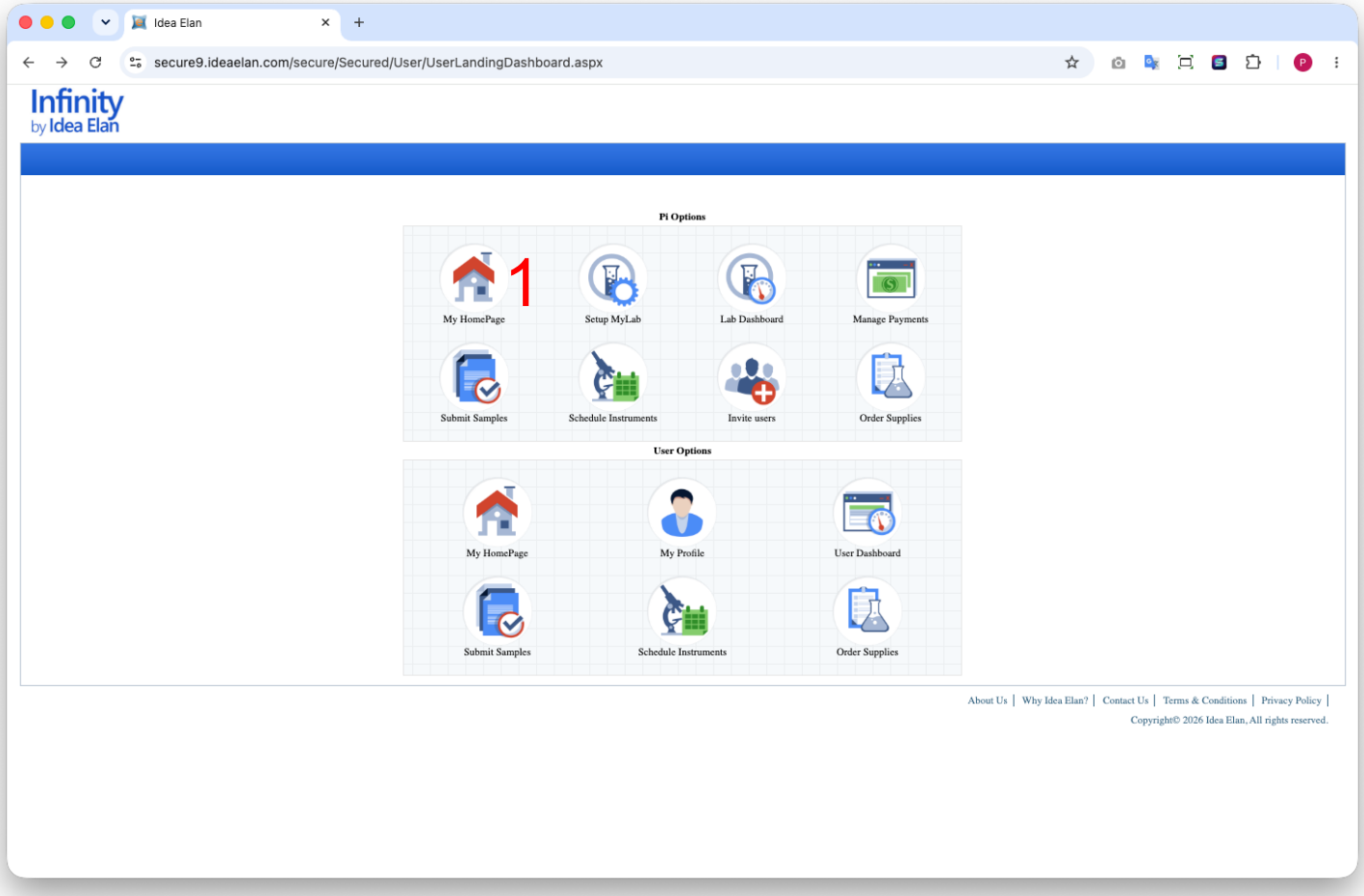
USER REGISTRATION

- The PI/Lab Admin and all users need to have a user account in the CFMS.
- This requires registration to the CFMS.
- The procedure to register internal and external users in the CFMS is described here ⚿ (contact CORE GIfMI if you can't access the document).

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LOGIN

- **Navigate to https://cfms.ugent.be.**
- Login with your credentials.
- A grid with icons will be shown.
  If not, you are probably already at the Home Page.
  - The **PI Options** enable lab setup, user management, …
  - The **User Options** allow users to do profile management, instrument scheduling, …
  - Remark: PI/Lab Admin is also a standard user.
- The icons are shortcuts to often used functions. All functionality of the CFMS is accessible via the menus on the homepage.
- **Click on My HomePage.**



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HOMEPAGE

From the homepage, you can access all functionality of the CFMS.
The main menu consists of two parts:

USERS SECTION

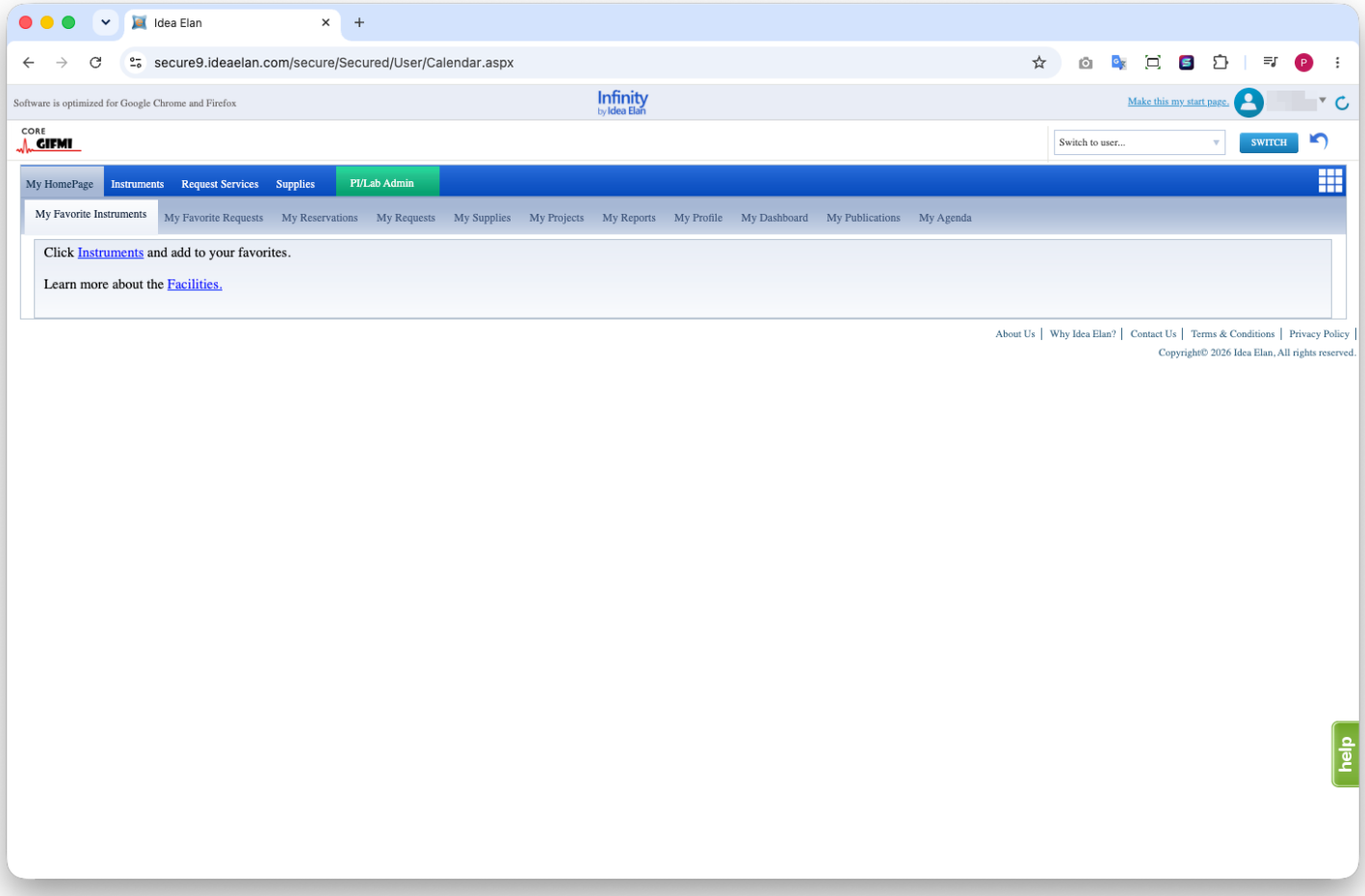
All users can do the following:

- Schedule instruments
- Manage reservations
- Access your user statistics

PI/LAB ADMIN SECTION

This is the green highlighted part in the main menu. Here you can manage your lab as PI/Lab Admin:

- Setup the lab
- Manage users
- Manage invoices

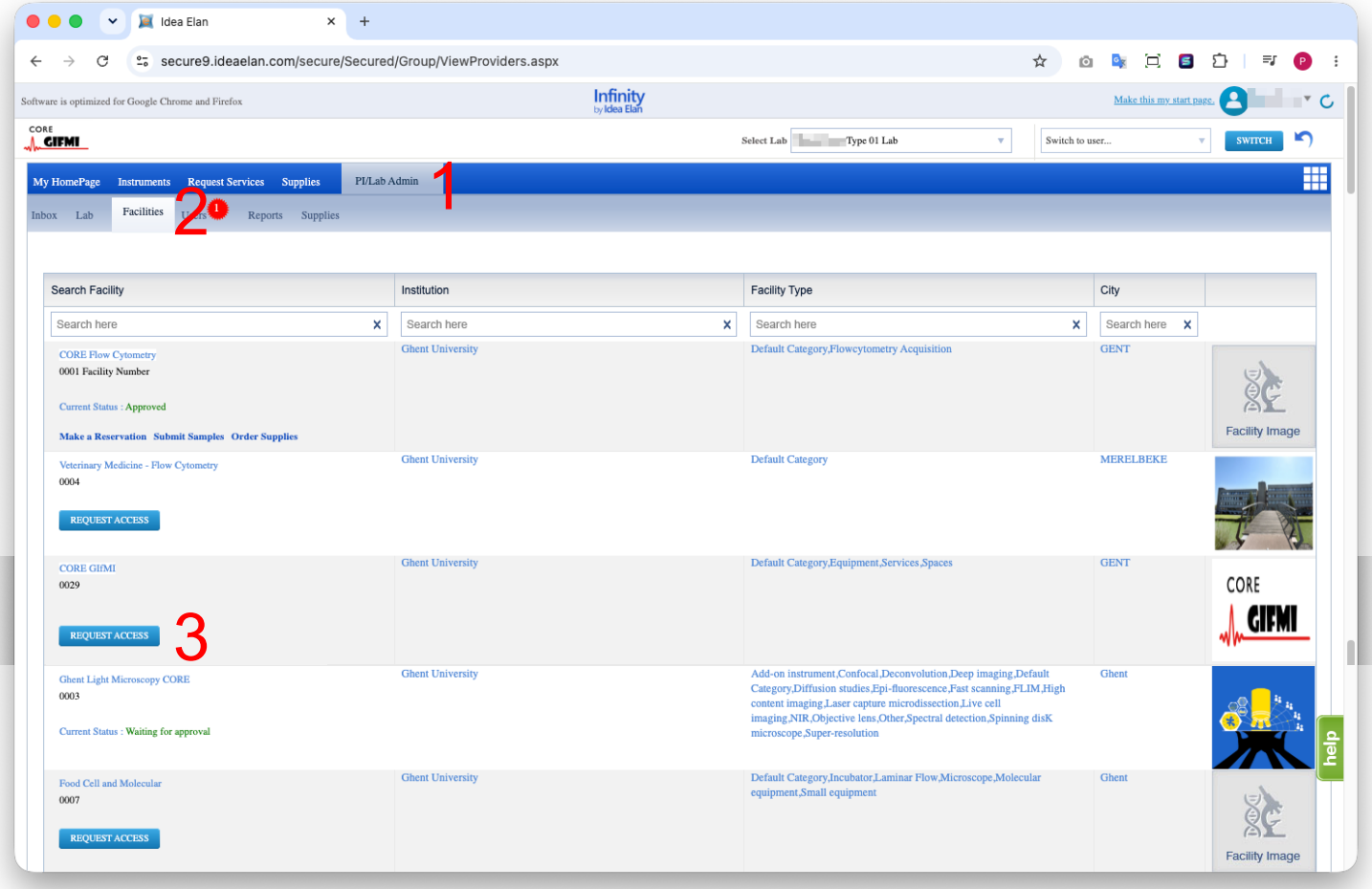


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SETTING UP THE LAB – REQUEST ACCESS TO THE CORE FACILITY

Your lab must first be granted access to the core facility.

- Click on PI/Lab Admin → Facilities.
- Scroll until you find CORE GIfMI.
- Click on Request Access.
- The CFMS Facility Admin will approve your request as soon as possible, the Current Status will be set to Approved. You will receive an email with the confirmation.



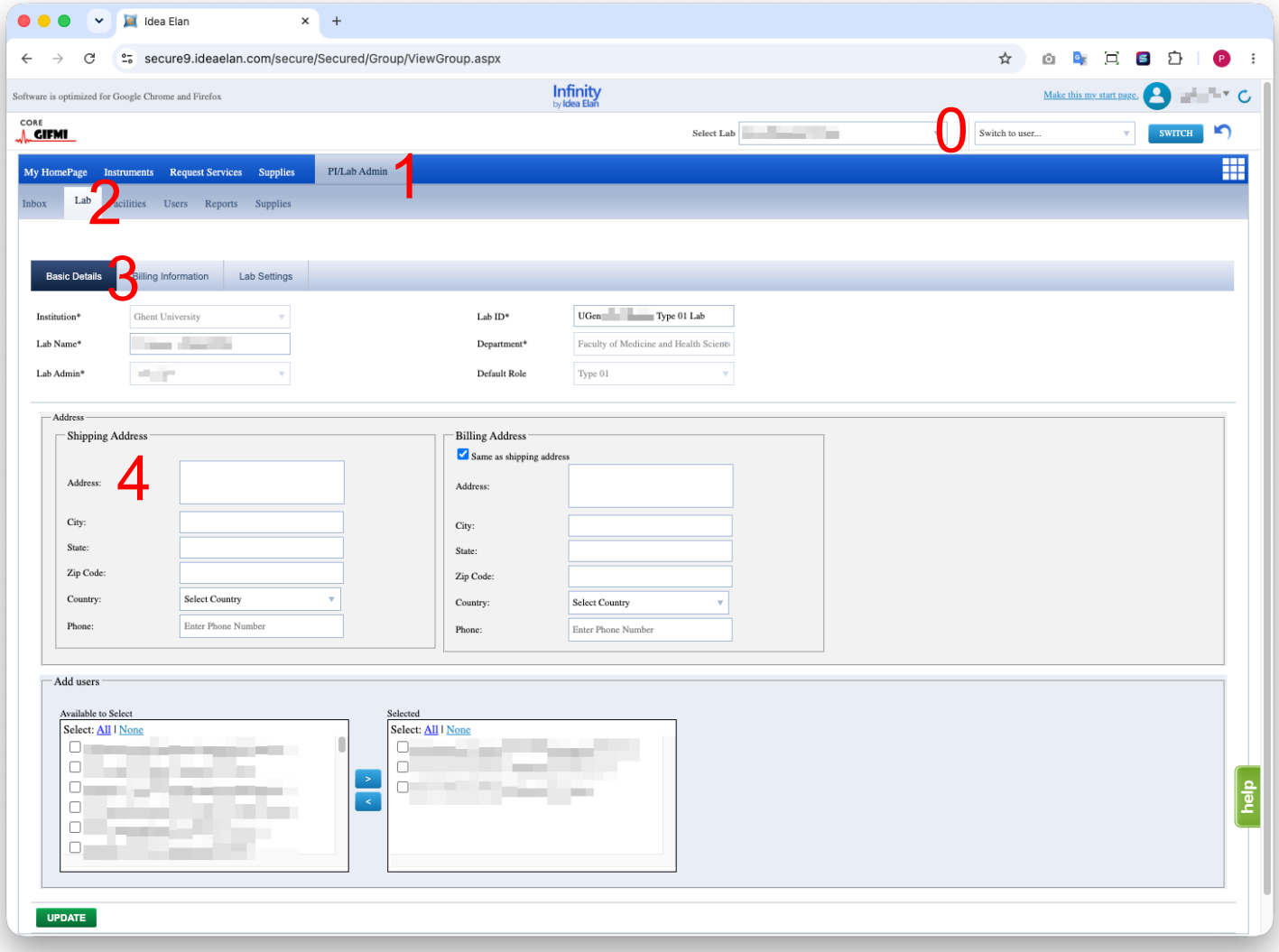
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SETTING UP THE LAB – LAB INFO AND USERS

Your lab must be properly configured and populated with users.

COMPLETE LAB INFORMATION

- PI's can have multiple labs. Make sure you are on the correct lab using the dropdown box.
- Click on PI/Lab Admin → Lab → Billing Information.
- Complete the missing address information.



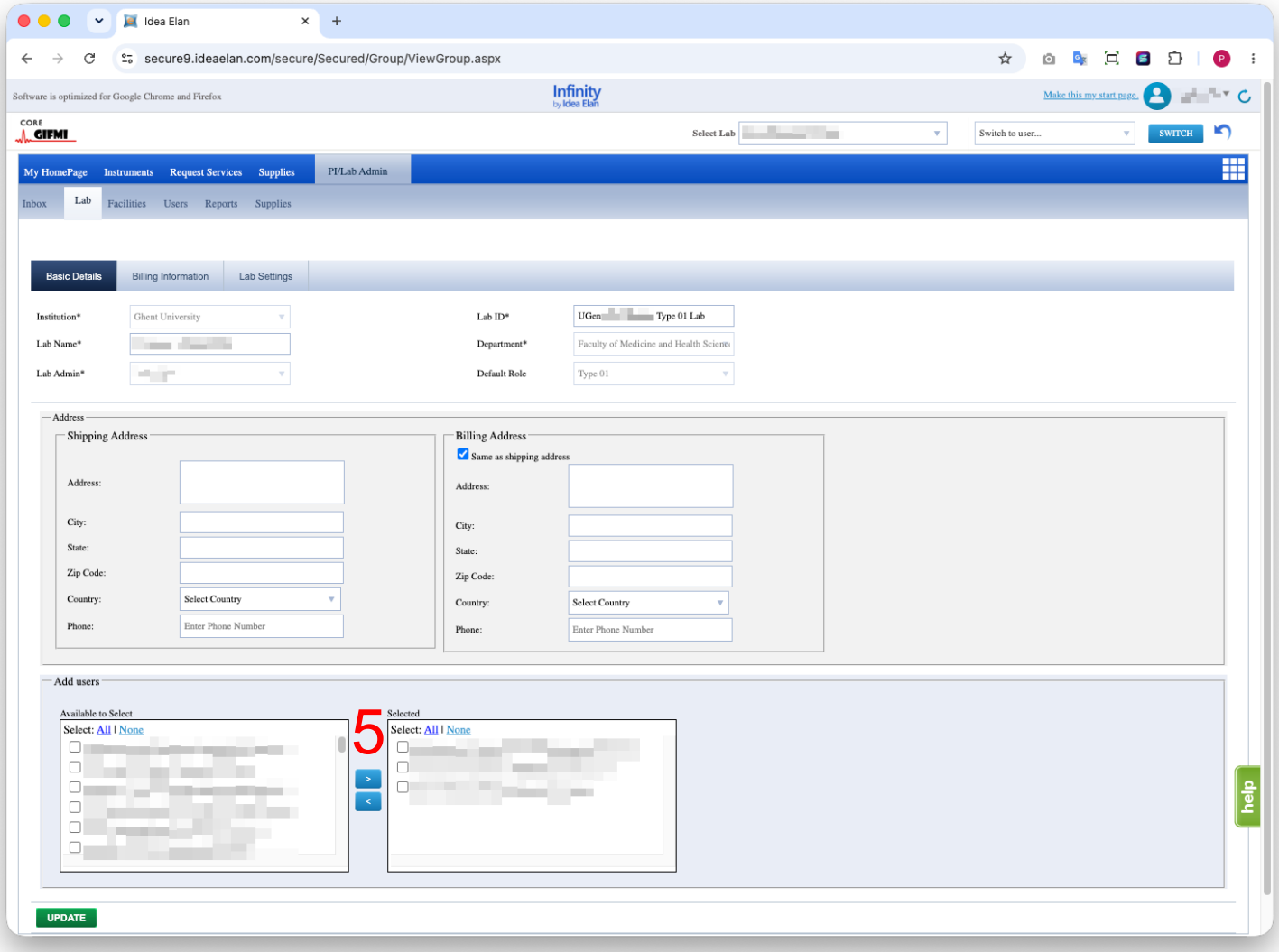
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SETTING UP THE LAB – LAB INFO AND USERS

Your lab must be properly configured and populated with users.

ADDING USERS

- Select the users to add using the checkbox in the left pane.
- Click on the right-pointing arrow.
  The right pane will be populated with all added users.
- Removing users from the lab can be done in the reversed way.
- **Remark**
  Users can also request access to a lab. These request are handled in the Inbox or Users menu (see later).



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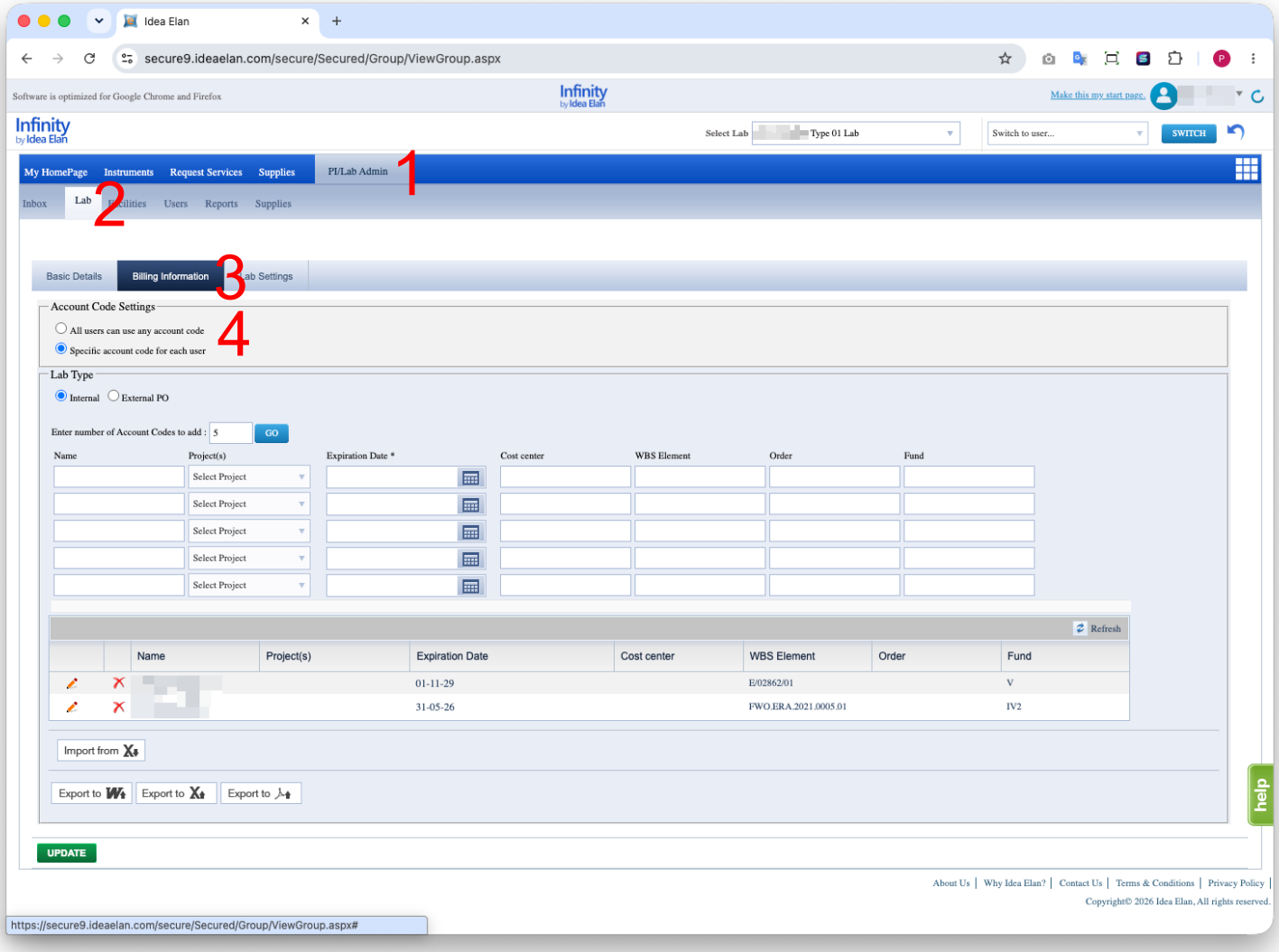
SETTING UP THE LAB – ADD COST CENTERS

The lab must now be updated with the financial details needed for instrument scheduling and invoicing.

Remark

- This is only applicable for internal users.
- External invoices are not handled by the CFMS.

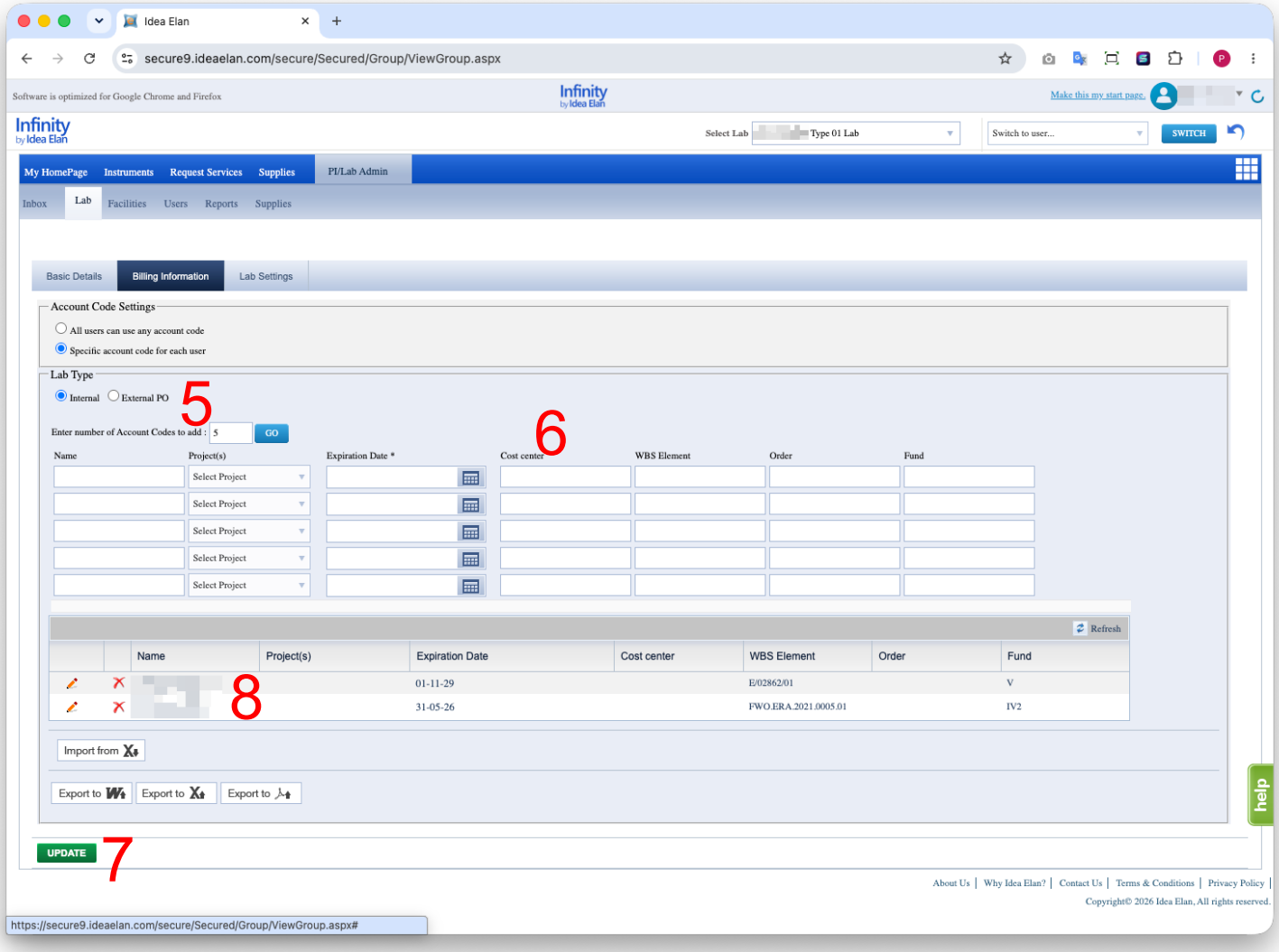
- Click on PI/Lab Admin → Lab → Basic Details.
- Set the desired account code option.
  Tip: set to Specific account code for specific user for maximal flexibility.



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SETTING UP THE LAB – ADD ACCOUNT INFORMATION

- Set Lab Type to Internal (UGent) or External (non-UGent), depending on the lab type. Contact CORE GIfMI for more information.
- Enter one or more budget elements.
  - *Name* (optional)
  - *Expiration Date* (if unknown: Dec 2099)
  - *WBS Element*
  - *Fund Code* (I, II, III, IV1, IV2, IX1, IX2, IX3, V)
- Click on Update.
  The account will be added to the list.
- **Remark**
  - If incorrect, an orange message box will pop up. Solve the issue and retry.
  - Budget elements can also be imported from Excel.

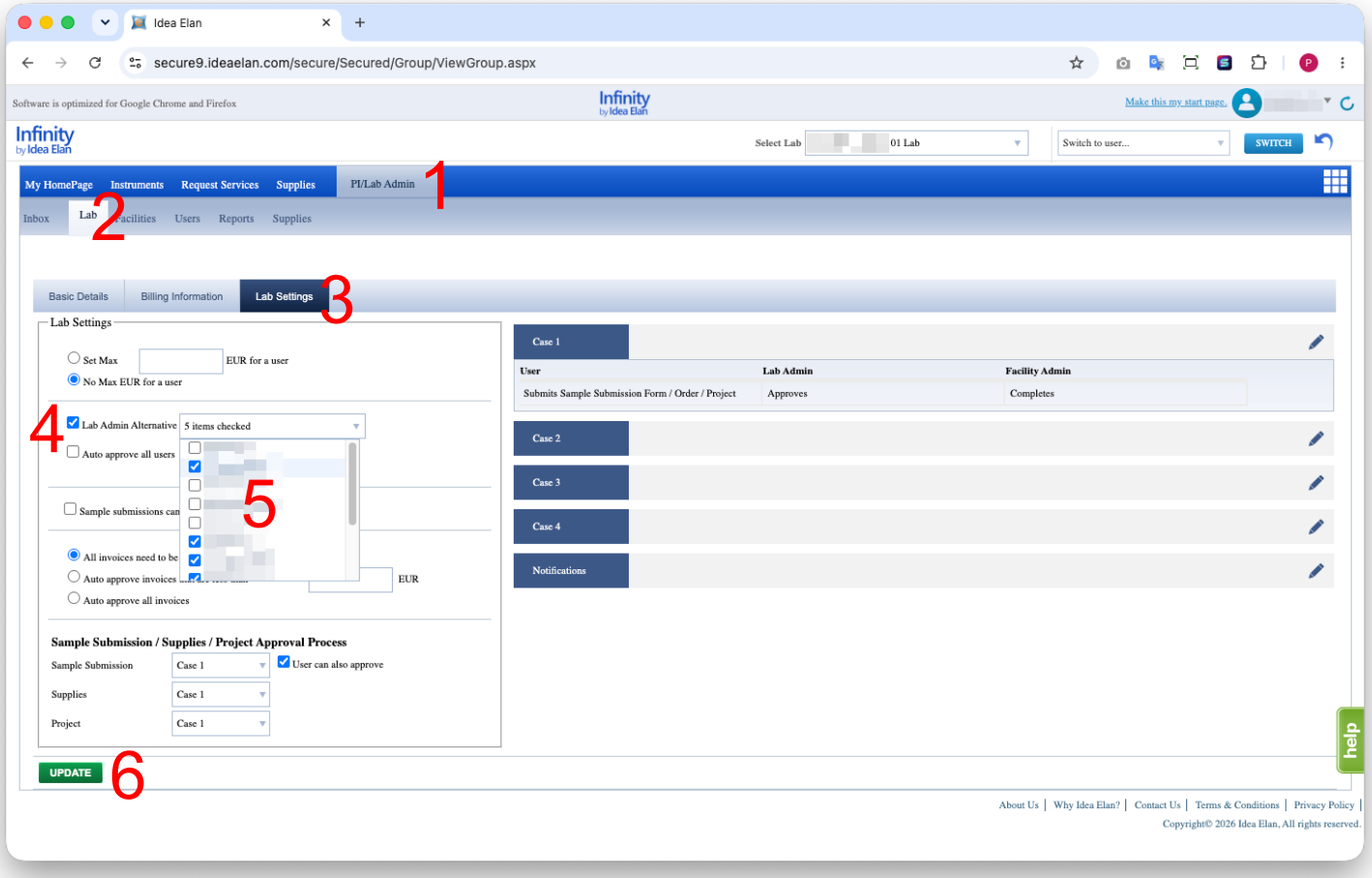


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SETTING UP THE LAB – ADD A LAB ADMIN ALTERNATIVE

It is recommended to create a user account for financial administration with PI-level permissions. This allows access to the lab setup and financial information for reviewing and tracking incoming invoices.

- Click on PI/Lab Admin → Lab → Lab Settings.
- Check Lab Admin Alternative.
- Select the users (see 'user registration').
- Click on Update.



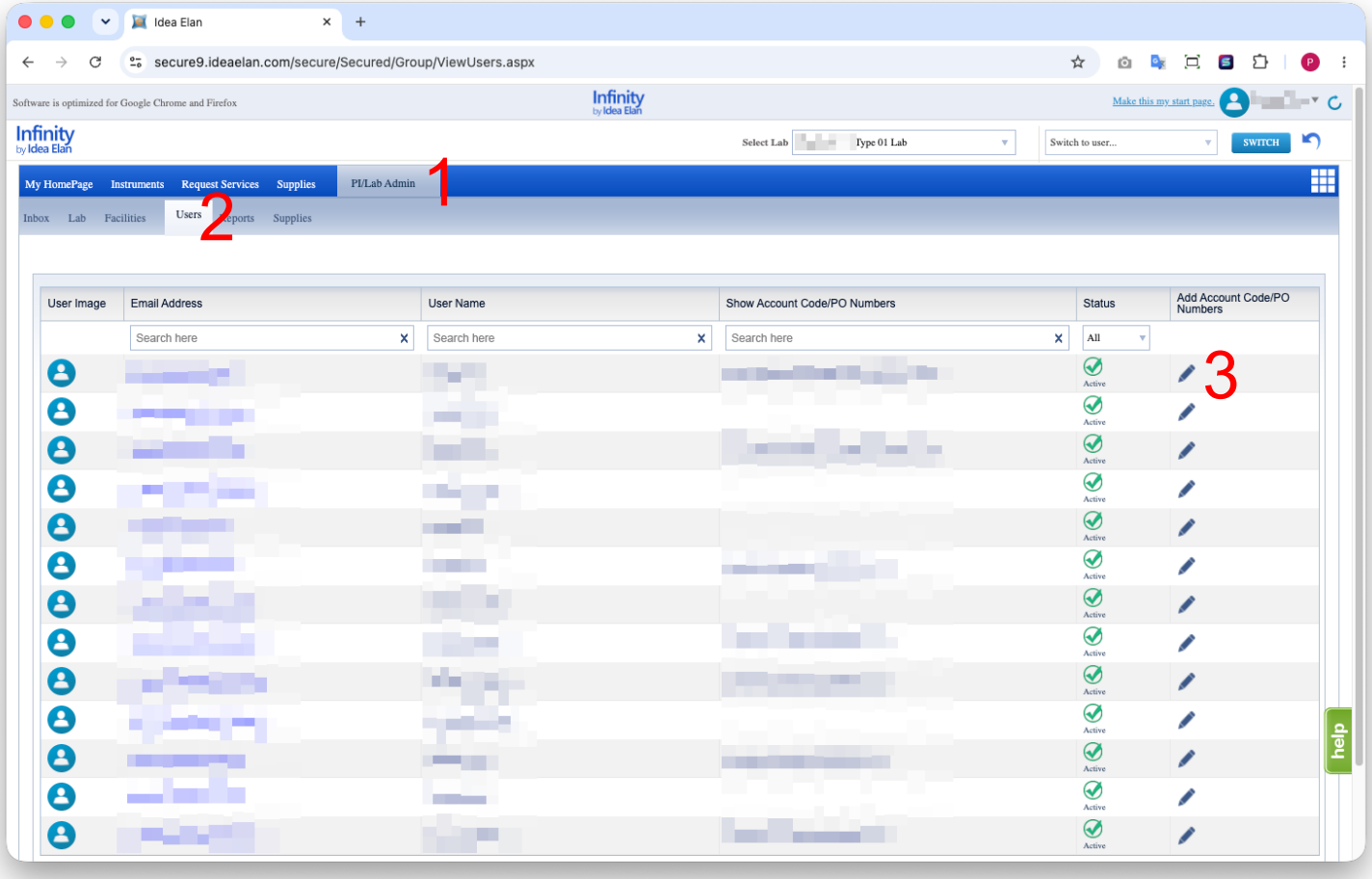
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SETTING UP THE LAB – ASSIGN ACCOUNT TO USERS

Each user must have at least one account assigned before instruments can be scheduled and invoicing can be processed.

LIST ALL USERS

- Click on PI/Lab Admin → Users.
- All users affiliated to the lab will be listed, including their respective access to the account codes.
- Click on the pencil icon next to the user.
- **Remark**
  - Users can be (de)activated by clicking the green or red icon. They will still stay member of the lab.

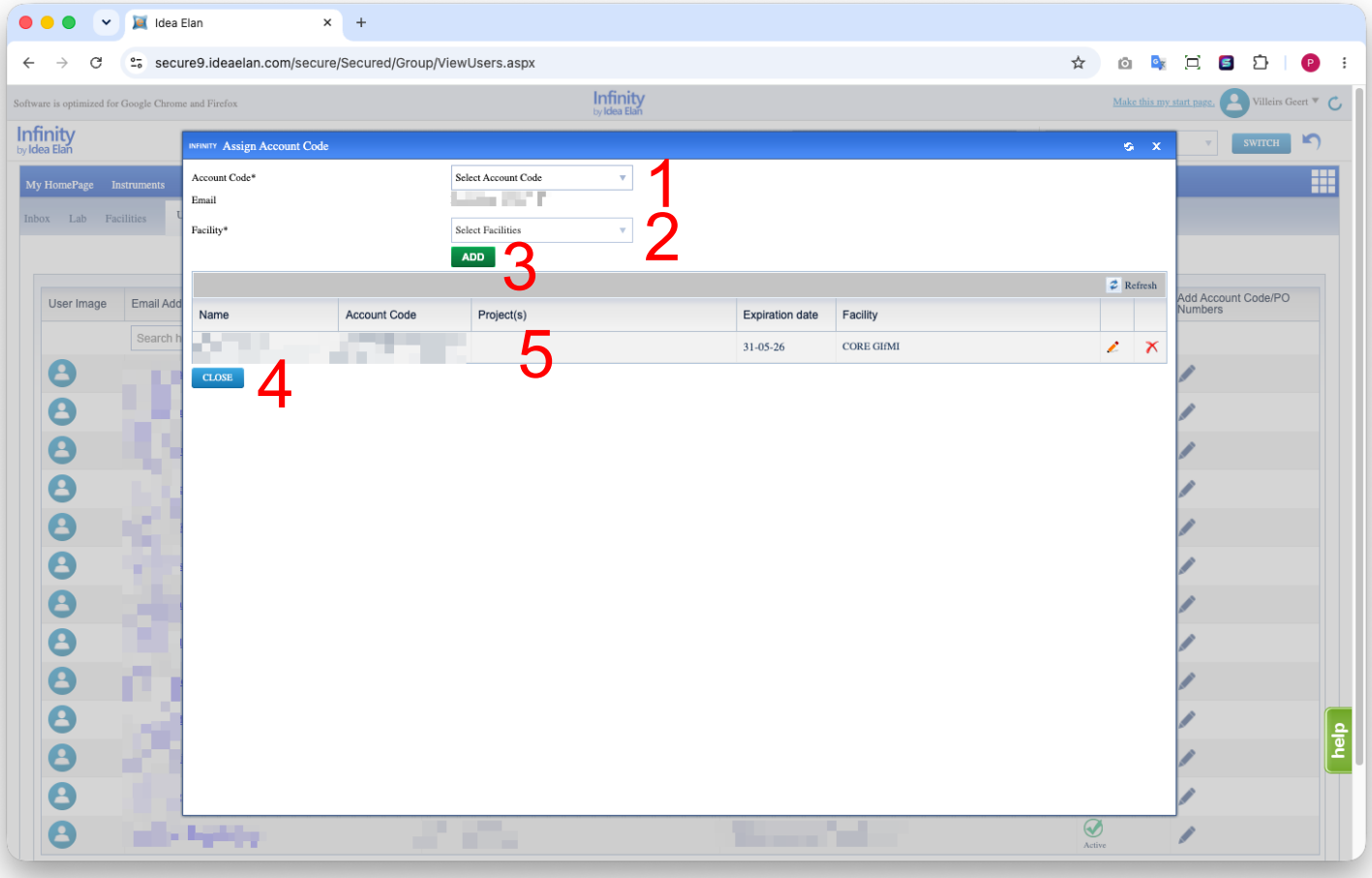


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SETTING UP THE LAB – LINK ACCOUNT TO USERS

The PI can fully manage access to core facilities and account codes.
Access can be configured flexibly, allowing any combination of users, core facilities, and account codes. For example, a user may have access to different account codes depending on the core facility being used.

- Select the account code.
- Select appropriate core facilities.
- Click Add.
- Select the users (see 'user registration').
- The account code will be added to the list.



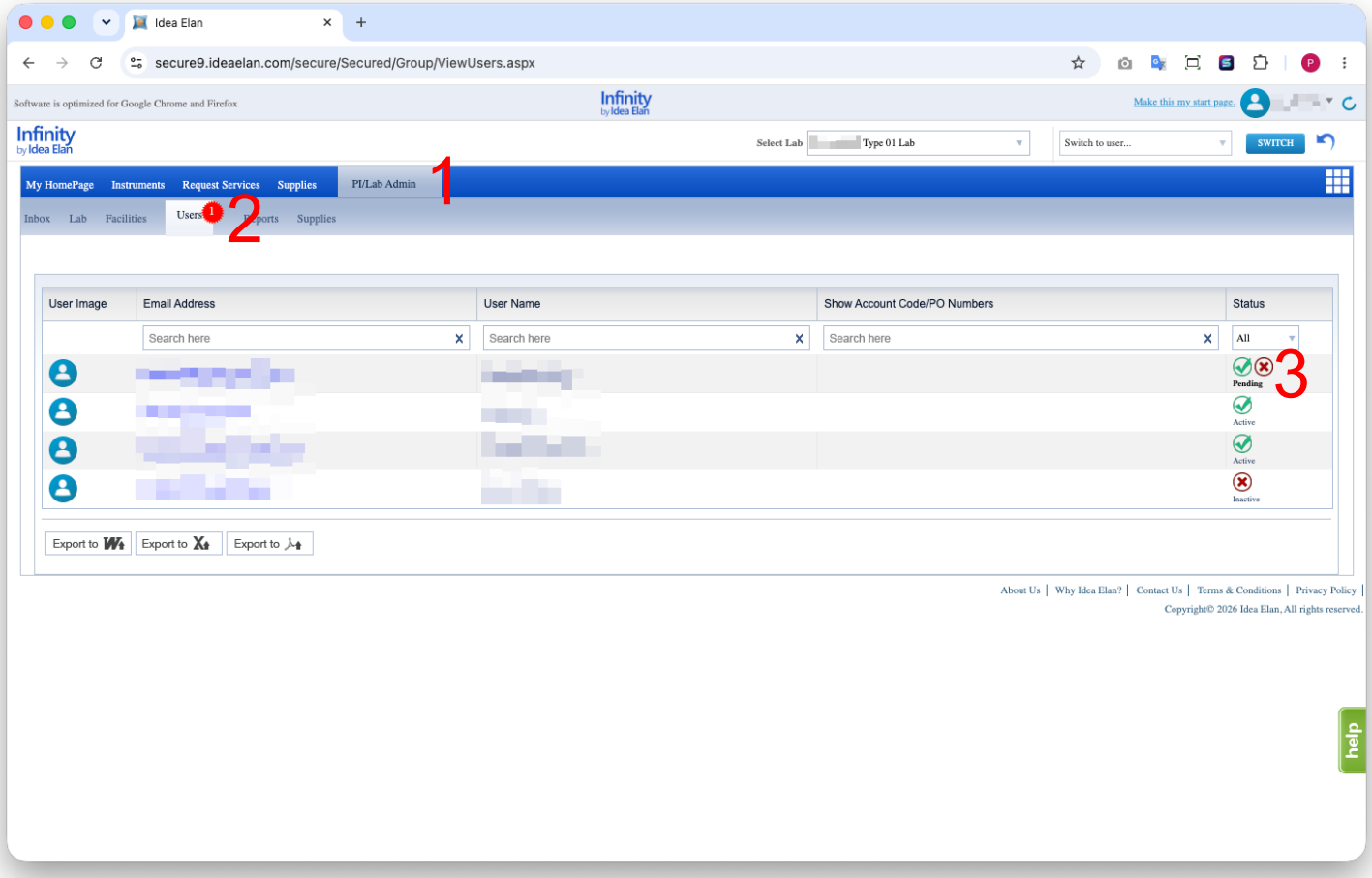
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SETTING UP THE LAB – LAB ACCESS REQUESTS

Users can be added manually to a lab as decribed before or by approving a lab access request from the user.
Lab access requests can be handled in two ways.

USERS

- Click PI/Lab Admin → Users.
- New lab access requests are marked with a red notification badge.
- Click the green or red icon on the right to approve or reject a request.
- Proceed as described before to assign accounts to users.



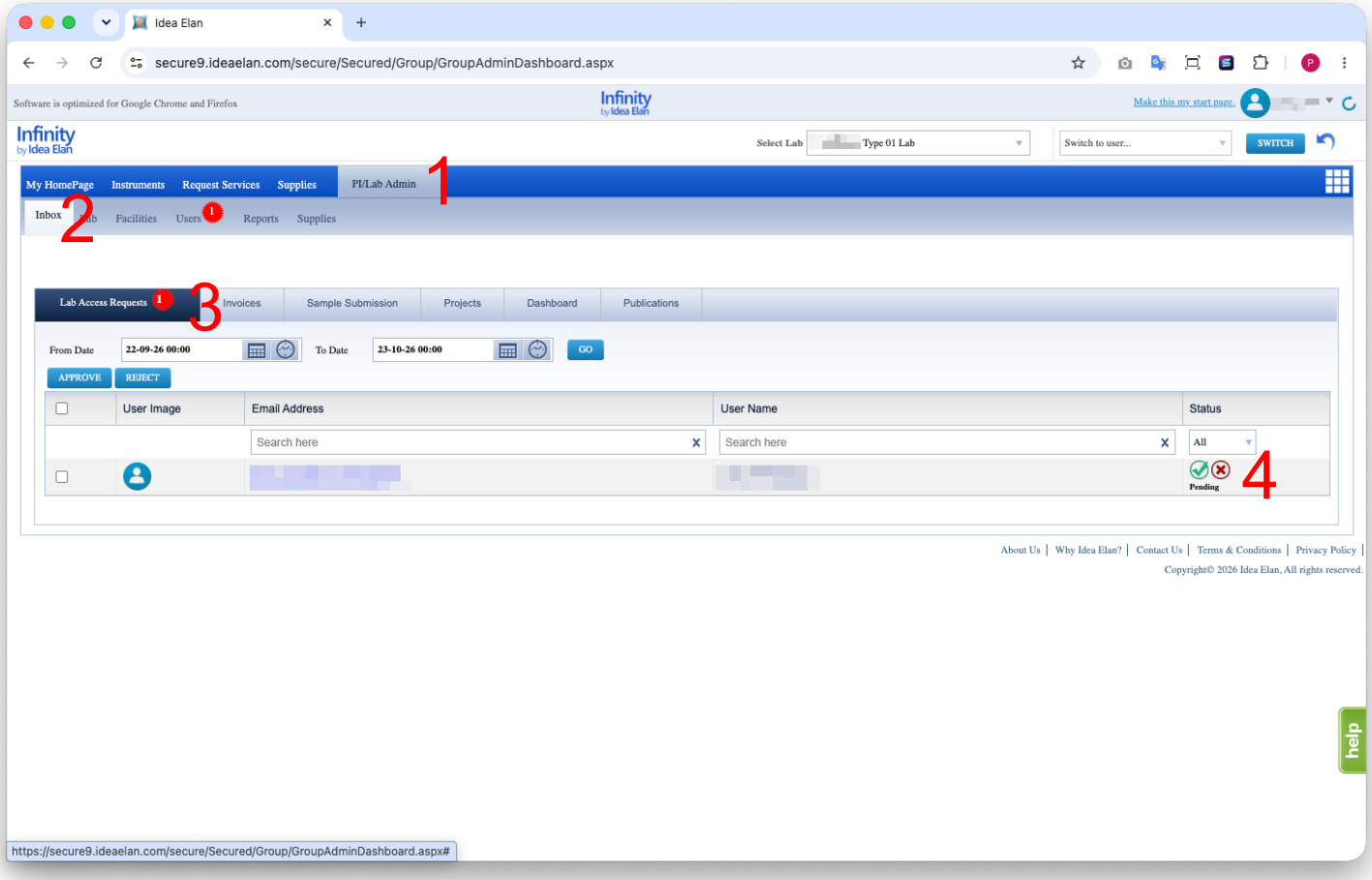
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SETTING UP THE LAB – LAB ACCESS REQUESTS

Users can be added manually to a lab as decribed before or by approving a lab access request from the user.
Lab access requests can be handled in two ways.

INBOX

- Click PI/Lab Admin → Inbox → Lab Access Requests.
- New lab access requests are marked with a red notification badge.
- Click the green or red icon on the right to approve or reject a request.
- Proceed as described before to link accounts to users.



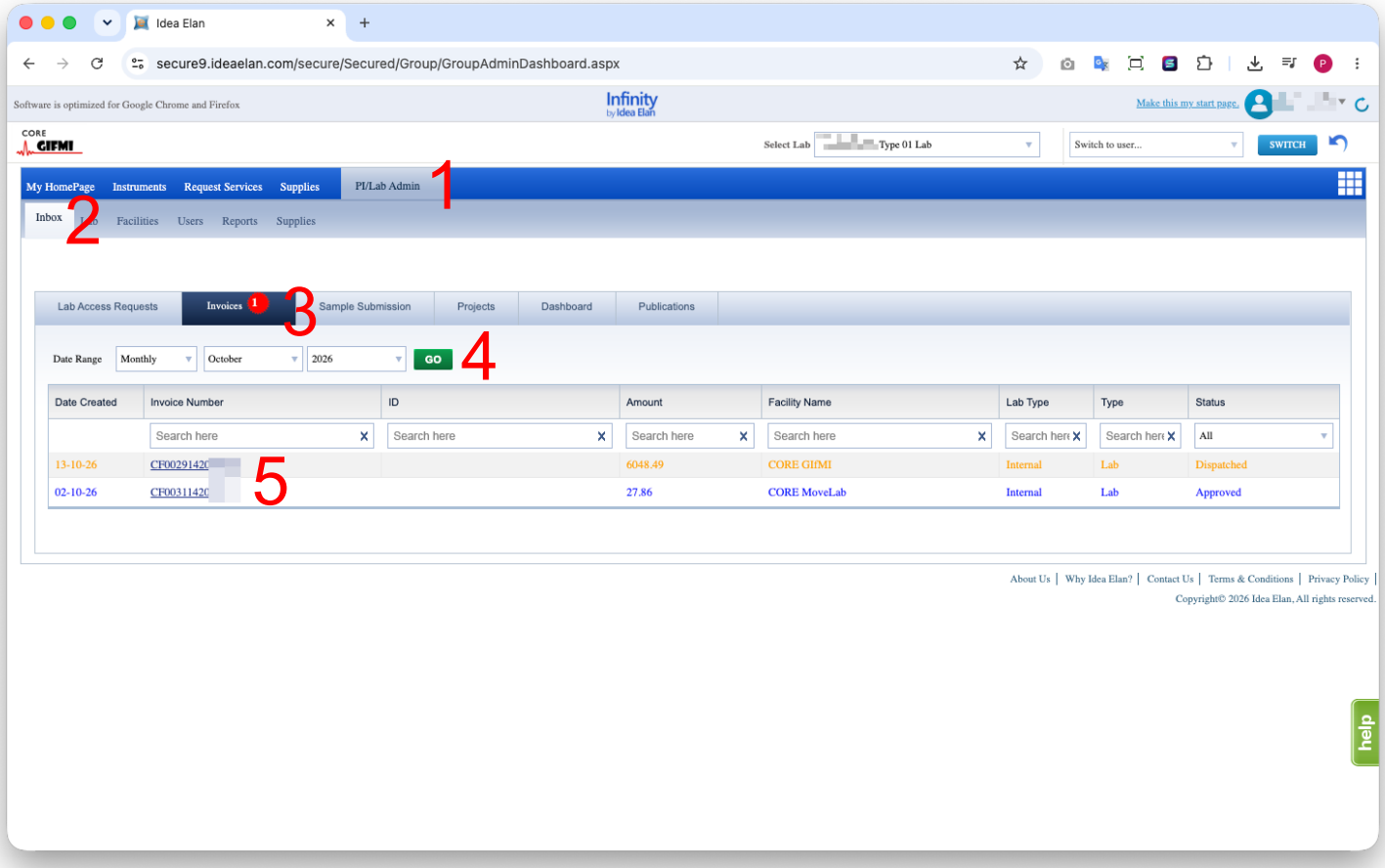
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INVOICES

Invoices are available through the Inbox. Invoices are usually sent quarterly. The PI/Lab Admin will receive a message from the CFMS.

LIST OF INVOICES

- Click on PI/Lab Admin → Inbox → Invoices.
- The availability of new invoices is marked by a red notification badge.
- If you don't see the invoice or want to review older invoices, customize the date picker to an appropriate range.
  TIP: use Annual or Custom.
- New incoming invoices have the status Dispatched.
- Click on the desired invoice number to review and/or approve.



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INVOICES - STATUS

The top part of the invoice view shows a bar marking the current status of the invoice.

Generated

The CFMS Facility Admin has generated an invoice.

Dispatched

The CFMS Facility Admin has sent the invoice.

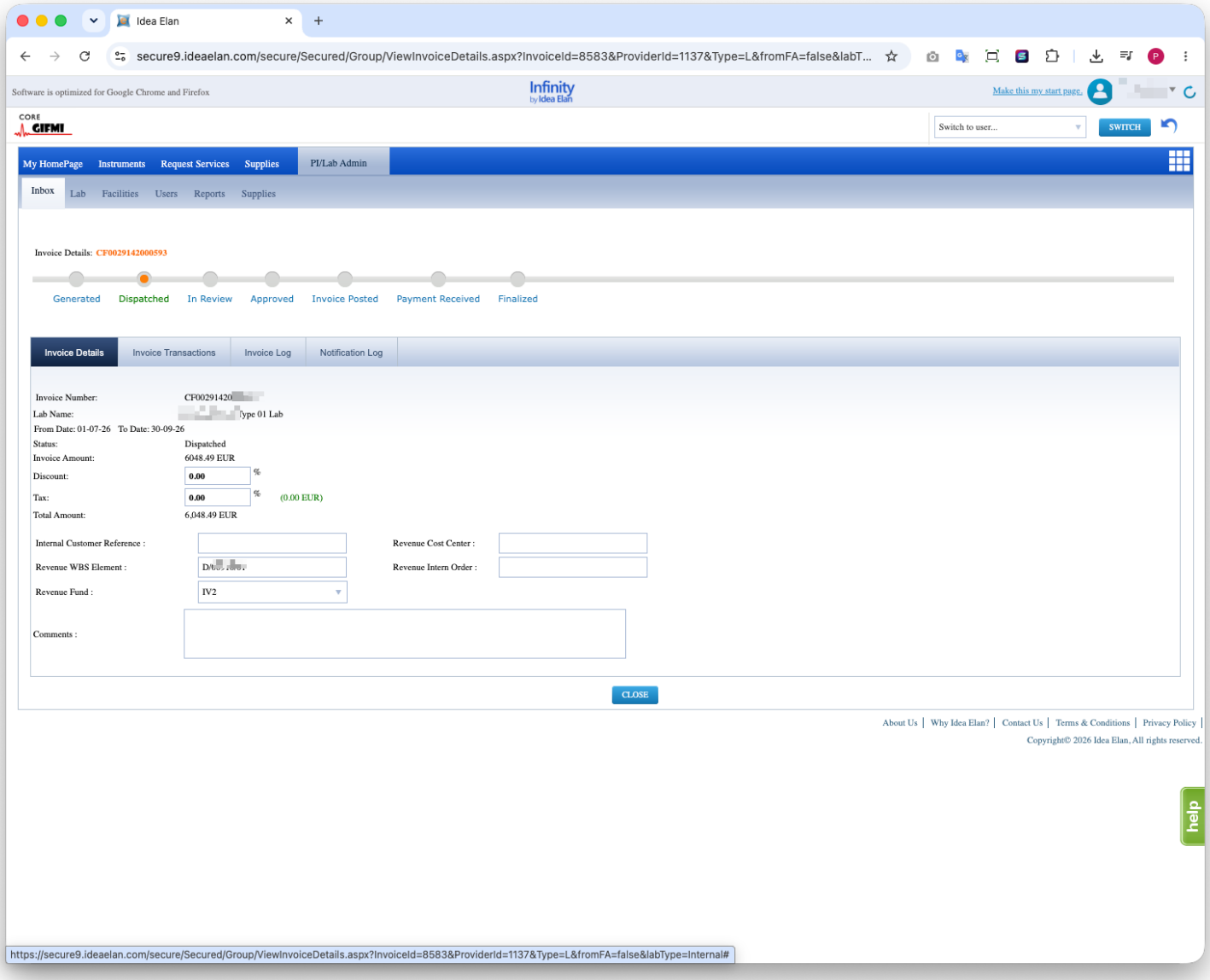
In Review

The PI/Lab Admin has requested the CFMS Facility Admin for corrections to the invoice.

Appoved

The PI/Lab Admin has approved the invoice, payment will be initiated by the financial department.

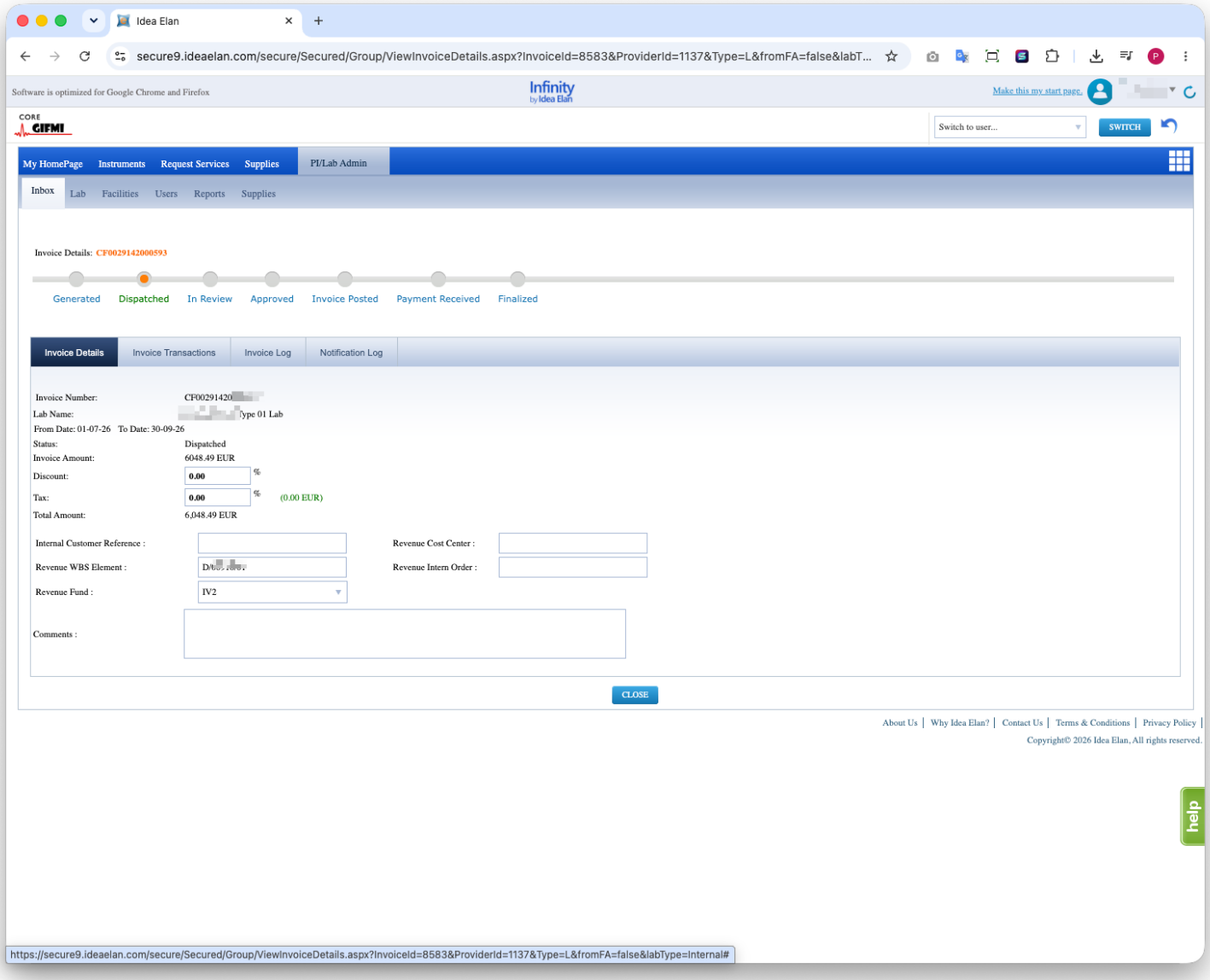
The other status flags are handled by the UGent fincancial department.



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INVOICES - DETAILS

- Click on Invoice Details.
- This tab shows a summary of the invoice.

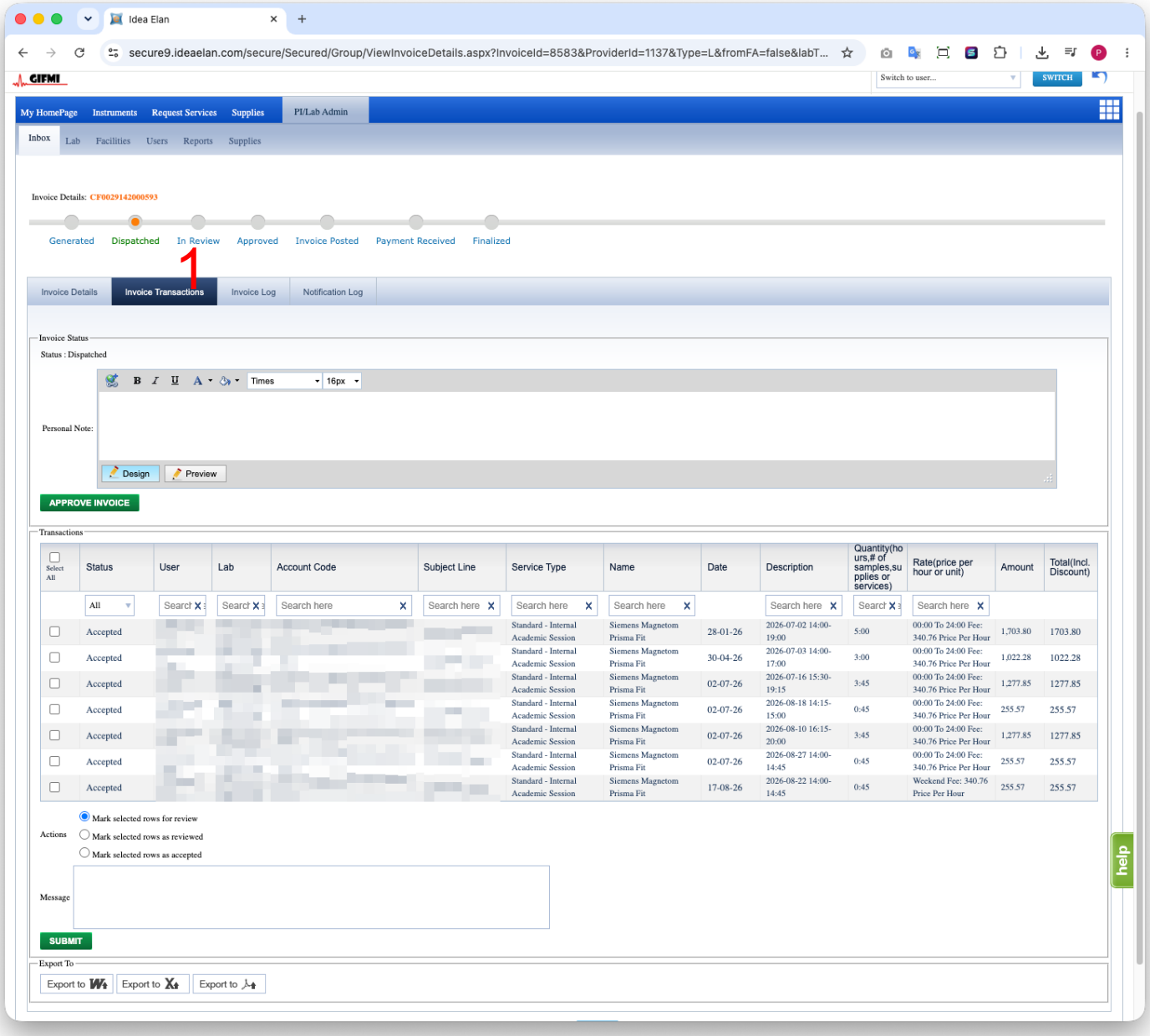


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INVOICES - TRANSACTIONS

Before approving an invoice, it is recommended to review all transactions linked to this specific invoice

- Click on Invoice Transactions.
- This page shows a list of all transactions for the invoice.
- From this page, you can approve or request a review for the invoice.



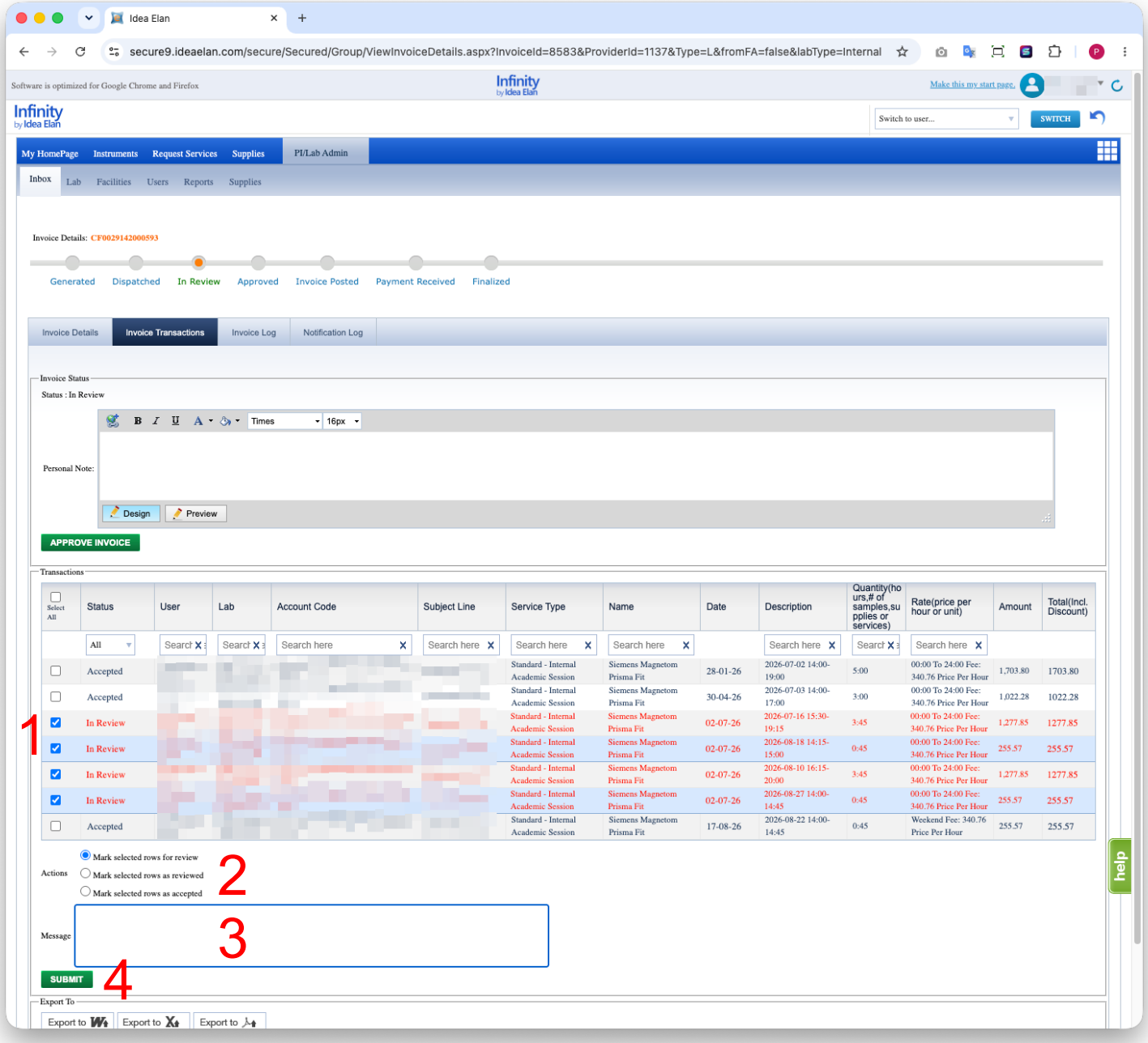
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INVOICES - REVIEW

This is an example of an invoice in review.

To review an invoice:

- Select the transactions eligible for review by checking the boxes next to the transaction.
- Select the correct action.
- Write a message to motivate the review.
- Click on Submit.
- The Status of the invoice and these transactions will change to In Review.
- The CFMS facility admin will receive a message and will review you request. Some conversation may be necessary to clarify the issues.



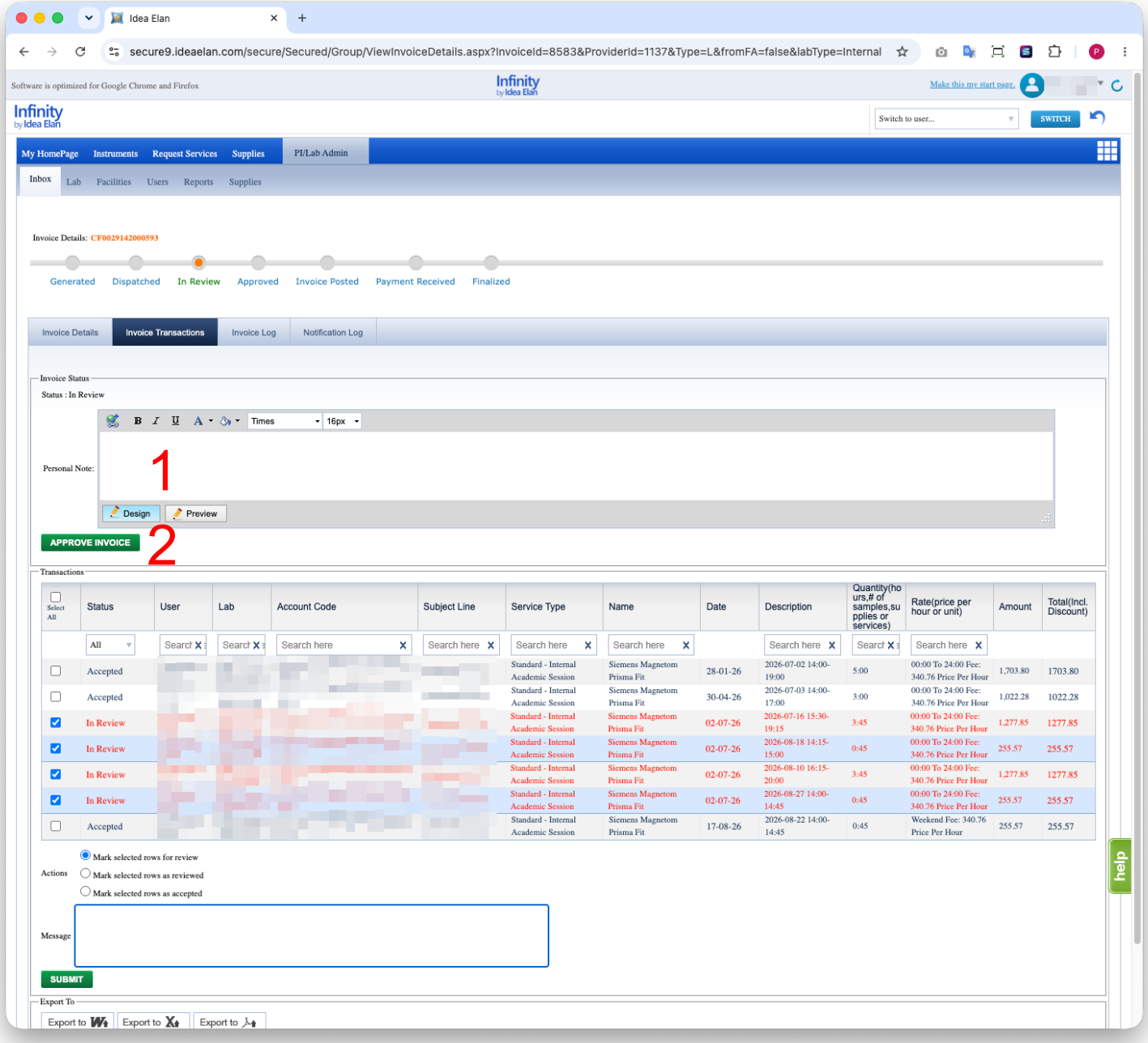
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INVOICES - APPROVE

After reviewing the invoice, the invoice must be approved for payment.

To approve an invoice:

- Write a personal note (optional)
- Click on Approve.
- The Status of the invoice will change to Approved. The CFMS Facility Manager will be notified of your approval.



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RESOURCES

- There is more information on the CFMS available on the CORE GIfMI Community Teams under channel Documentation/CFMS.
- You can join the community via https://gifmi.ugent.be/en/community
- Send questions and remarks to gifmi@ugent.be.

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