ONLINE PEOPLESOFT SERVICE CENTER MODULE

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ONLINE PEOPLESOFT SERVICE CENTER MANUAL

You can now complete your Service Center Rates online.

Three players involved:

1) Office of Cost Analysis (OCA)
2) Service Center Facility
3) College

Link to Service Center Bolt on Module:

MyPack Portal/Main Menu/Financials Systems/Service Center

Service Center Overview:

• There are four components associated with the People-soft Service Center Module:
  • Facility Setup
  • Rate Name Setup
  • Rate Request Form
  • Overview
  • NOTE: this manual covers all four of the components mentioned above.

Access to Service Center Module:

• Before any user can access the Facility Setup, Rate Name Setup and/or the Rate Request Form, individuals must complete system training by OCA. Please contact the Office of Cost Analysis at 515-8808 for training. In addition a SAR request by the service unit /department has to be submitted and approved. Two roles for Service Center SAR Requests:
  • 1) Service Center Administrator-This would be the role to give to the Service Center Administrator. If you are unsure who the Administrator would be, please call Cost Analysis at 515-8808
  • 2) Form Approvers-This would be for all approvers to the Rate Request Form including the Service Center Initiator who is the person entering the Rate Request Form details.
  • 3) Both (A User can have Both Roles, if needed.)

• Unlike in the past, a Service Center project ID is not necessarily considered a Service Center Facility

• Service Facilities can have multiple project IDs based on how your college defines their Service Facilities. (For example, Analytical Instrumentation Facility has many project IDs under one facility)
**New Service Center Facilities: (This is not done in the service center module)**

- Once you have defined your Facility and if the facility is new, you should call the Office of Cost Analysis (515-8808) for training on establishing a Service Center.

- You should also select a Service Center Rate Administrator (person completing the Facility and Rate Name Setup components) and an Initiator (person completing rate request form) prior to the meeting that will be completing the required forms.

- Cost Analysis (OCA) will meet with the Service Center Administrator, Service Center Director and the Initiator to go over service center requirements.

- OCA is the only unit that can set up a new Service Center Facility as well as assign the Service Center Administrator role in the online system.

- At this point a SAR request should be submitted for all the users associated with the service facility. (Please refer to page 1 for the SAR roles needed). SAR requests only need to be done once for the Service Center Module.

- Once the SAR roles have been requested (if needed), The following are the user types associated with the online version of the service facilities:

  1) *Service Center Rate Administrator*-Is responsible for the information on the Facility Setup and Rate Name Setup

  2) *Initiator*-Is responsible for entering the details on the Rate Request Form.

  3) *Service Center Director*-Head of the facility and a rate request form approver

  4) *Financial Fund Approver*-Person responsible for the financial aspects of the rate request form and form approver

  5) *Department Head*-Head of the Department and form approver

  6) *Financial LEAD*-Business Officer in the College and form approver

  7) *Service Center Inquirer*-Can see the details of the rate request form but is NOT a form approver
CREATING THE FACILITY SETUP

Note only the Office of Cost Analysis can create a new facility. However once it is created, the Service Center Administrator can add contact/approver and Personnel information.

- There are 3 tabs associated with the Facility Setup page:

1) General-OCA completes the Facility Name and Description based on a meeting with the Service Facility’s staff (as described above).

2) Contact/Approvers-OCA will setup up the Service Center Administrator. Once this happens, the Facility’s status will change from New to Pending.

3) The Administrator should now be able to locate the Service Facility through a search mechanism searching on either the Facility code, the Department number or the Service Center Facility status.

4) The Service Center Rate Administrator now has the ability to go into the Facility Setup page and add the Service Facility’s roles and the personnel (discussed below).

5) Personnel-Service Center Rate Administrator can list all employees associated with facility on this tab.
Above is the screenshot to find an Existing Value on the Facility Setup. Only the Office of Cost Analysis can Add a New Value. The user can Find an Existing Value searching by Facility Code, Department or Status. There is a magnifying glass if you don’t know the Facility Code or the Department or you can select “Contains” on the dropdown and enter a partial number for Facility Code or Department. You can also select from the status dropdown. If you are having difficulties, please contact Cost Analysis at 515-8808.
Below is a snapshot of the user types that are associated with a service facility.

![User Types Snapshot]

- After the Service Center Administrator finds the Facility and the applicable SAR requests have been approved, the Service Center Administrator should go into the Facility Setup page and assign unit’s user types on the Contacts/Approvers tab. Please make sure the individuals have SAR request approvals for their respective roles.

- On the Personnel tab of the Facility Setup page (see below), the Service Center Administrator has the option of selecting all the Permanent Full Time personnel working in the entire Facility or they will have the option to set up personnel at applicable Rate Name Setup level or a combination of both.) If the facility has many rates/services, it may be best to add all the Full time permanent personnel working on all the rates at the Facility Setup level. If the Facility only has a few Rates/Services, the Administrator may decide to add the Full Time Permanent Personnel at the Rate Name Setup level. The Initiator will be able to see the personnel that has been added on the Salary Details page of the Rate Request form once the individuals have been added. A personnel tab has been added to the Facility as well as the Rate Name setup for flexibility. It’s really a decision by the Service Center Administrator where to add the Full Time Permanent Employees. They should NOT be added in both places.

- The Administrator can search on the name or enter the Empl ID.

- The Administrator must also select the Employee Type/Fringe Benefit type for each employee. (Click the magnifying glass for details). The administrator should choose the employee type for each individual based on the listed definitions in the search menu.
• Once the Service Center Administrator has completed the Contact/Approver part of the Facility Setup Page and and/or the Personnel tab (optional) and hits “Save”, the Facility will change from “Pending” to “Active”.

• NOTE: the Service Center Rate Administrator is NOT required to select personnel on the Facility Setup Page. The Administrator has the option of selecting the Full Time Permanent Personnel on the Facility Setup or the Rate Name Setup but not both. See page 5 above for more details on this.

• Once the Facility is Active, the Administrator can go to the Rate Name Setup page.
CREATING THE RATE NAME SETUP

- RATE NAME SETUP: (Responsibility of the Service Center Rate Administrator):
- There are two components to the Rate Name Setup page:

1) General- Includes the Rate/Service Name and Rate/Service Description, Rate contact and Notes.
2) Personnel- To be completed for full time individuals providing effort on the particular service if the personnel was not selected at the Facility Setup level. Part time individuals will be entered on the Rate Request Form.

The Service Center Rate Administrator can Find an Existing Rate if any Rate Name Setups were previously added, or if a Rate already exists.
The Administrator may add a new rate/service for all new services.

Once all the rate/services have been added or existing rate/services have been located, the Service Center Rate Administrator can:

1) If New- Complete Rate Name, Description, Rate Contact and Notes
2) If Existing-Edit Rate Name, Description, Rate Contact and Notes.
3) Click the save button at the bottom when complete.
Below is an example of an existing Rate

- If the Rate doesn’t already exist, The Service Center Administrator adds and completes a Rate Name Setup for each service the service facility provides. Information included is: Rate Name, Rate Description, Rate Contact and Notes.

- NOTE: Rate Name Setups are not “Active” until the Rate Request Form has been approved by either (a) the Office of Cost Analysis if charging Sponsored C&G projects or External Federal customers or (b) the College Financial LEAD if NOT charging Sponsored C&G projects or External Federal Customers.

- As mentioned on page 5, the Service Center Administrator has the option of selecting only the Permanent Full Time personnel on each of the Rate Name Setup pages, or selecting all the Permanent Full Time personnel in the facility on the Facility Setup page or a combination of both. If a Full Time Permanent Employee was added on the Facility Setup, you should NOT add them on the Rate Name Setup in the Personnel Section. Only add names to the Rate Name Setup Section that were not added in the Facility Setup Personnel Tab. Part Time/Non-Permanent employees can be added to the Rate Request form (discussed later in this manual.)
On the slide below, you will see two individuals that were selected on the Facility Setup page (under “Facility” section) and one individual working exclusively on Rate Name under “Rate” section. However, the Administrator may add all the Full Time Permanent Employees at the Facility Setup level. The Personnel tab was added at both the Facility and Rate Name Setup levels for users flexibility and convenience.
CREATING THE RATE REQUEST FORM:

Finding an Existing Value

NOTE: (Service Center Initiator is responsible for this component.)

The user can find an Existing Value if there was a previous Rate Request Form prepared.

You can select “begins with” or if you prefer, you can use the dropdown and select “Contains” for any search criteria. If the Facility has services with multiple project IDs, you can search on the Facility code and all the rates along with the respective project IDs will appear or just search on the project IDs one at a time.

NOTE: AS YOU WORK THROUGH THE RATE REQUEST FORM, IT IS RECOMMENDED THAT YOU SAVE THE ENTERED INFORMATION OFTEN. YOU CAN SAVE THE INFORMATION AS MANY TIMES AS NECESSARY BEFORE SUBMITTING.
The following are the tabs you will see at the top of the Rate Request form.

- There are 4 tabs to the Rate Request form:
  - 1) Rate Request form-Initiator will enter the Project Id, Check Box on Charge C&G and/or External Federal Customers, Direct Cost, Adjustments, Usage & Rate on this page.
  - 2) Salary Details-This will show the Permanent Full Time Employees chosen from the Facility Setup Page and/or the Rate Name Setup Page. The initiator has the option of choosing Part Time/Non-Permanent employees as well (discussed on page)
  - 3) Facilities/Equipment-This shows the Facility Building, Room and percent of time the Service Rate takes place in the listed Building and Room. Rooms cannot be allocated more than 100%. Also this tab list the equipment used on the rate. The initiator must list the Tag Number and all relevant data will be populated. The initiator must check the Facilities/Equipment information below is accurate or not applicable each time a service rate is developed in order to complete the Rate Request form and forward to OCA for review and approval.
  - 4) Comments-Section for all comments associated with the request form. We encourage use of this tab as it can provide valuable information regarding the data on the Rate Request Forms.

**NOTE:** Due to data inter-dependency between the Rate Request form tab and the Salary Detail tab, users will be required to enter data back and forth between the two tabs at different times thus the following information is written to direct the user when to enter data on the different tabs of the Rate Request form.
NOTE: If a previous Rate Request form exists, the user SHOULD copy the previous rate by using the COPY feature on the right of the Rate Request form. However, some data will NOT be copied. Once the copy feature is used, the user must start by completing the project ID on the rate request form and select whether the rate will charge contract and grant sponsored projects or External Federal Customers. Once this information is provided on the form page the initiator can move on the Salary Details tab. NOTE: If the user must create a new rate form due to a new service, the Service Center Administrator must add the Rate/Service Name Setup prior to creating a new form as the Rate Name Setup and the Rate Request Form are linked.

**ADDING A NEW RATE REQUEST FORM**

If a previous Rate Request form does not exists for the particular service, the Initiator should make sure the Administrator has added a Rate Name Setup for the service. Rate Name Setups and Rate Request Forms should be a one to one match. Once that has been added, the Initiator can “Add a New Value”. The Initiator should select the appropriate Facility code and Rate Name Code by using the magnifying glass search feature and click on Add and follow the appropriate steps.

![Rate Request Form](image)

**NOTE**: Once the Initiator “Adds a New Value”, they can begin to complete the Rate Request Form in the same manner as if they copied an existing rate. The Initiator must enter the Project Id, and click the Check Box “Charge C&G Projects and/or External Federal Customers”, and enter a value in the Utilization Box and Save before proceeding.
**SALARY DETAILS TAB**

After the Rate Form is copied or a New Value added the Initiator should begin with the Salary Details page.

The Salary Details page includes permanent labor that was entered on the Facility Setup or Rate Name Setup page by the Service Center Rate Administrator.

NOTE: Best practices procedure is to have the Initiator inform the Service Center Administrator prior to updating/adding a new rate to ensure that the Permanent Full Time Employees have been updated at the Facility or Rate Name Setup tabs. Temporary Non-permanent labor will need to be added by the Initiator on this Salary Detail tab.

• NOTE: If it is determined that there are new employees to the service or any existing employees that are no longer working in the service facility, the Service Center Rate Administrator must update the Permanent Full Time Employee Names on either the Facility Setup or Rate Name Setup pages prior to the Salary Details being completed on the Rate Request Form.
• The HR Salary Amount will populate based on the most current information in the HR system. If this is correct, the initiator will need to type that amount in under the Annual Salary section. If not correct for the service center then the correct amount should be entered in the Annual Salary section.

• The initiator is then required to enter the percent of effort for how much time the listed individuals are working on this particular service even if the individual is being paid by a different source.

• If the individual works in the Facility but is NOT working on that particular service, the individual personnel will need to be deleted by hitting the (-) button to the right of the row)

NOTE: The Service Center Rate Administrator cannot add Part Time or Non-Permanent employees at the Facility or Rate Name Setup. These can only be added on the Rate Request Form by the Initiator on each individual Rate Request Form.
• When adding Part time or Non-Permanent Employees, the Initiator does not have to list by Empl ID or Employee Name. If these are known, please enter them. If not known, Empl ID is not a required field. If the Employee Name is not known, please just list TBD. Please list the Position Title, Employee/Fringe Benefit Type, Annual Salary and % of Effort that the employee is working on this service rate. The fringe benefit amount will calculate accordingly once the Employee Type and all required fields have been populated.

• Once all Salary information has been listed and updated on the Salary Details tab of the particular rate/service, the sum of these expenditure amounts will forward to the Rate Request form.

• The Initiator should now be able to complete the other required fields on the Rate Request form such as:
**Direct Costs section** — NOTE: LIST ALL DIRECT COSTS NECESSARY TO PERFORM SERVICE EVEN IF A DIFFERENT FUNDING SOURCE IS PAYING FOR PART OF THE COSTS. YOU WILL USE THE DIRECT COST SUBSIDY LINE IN THE ADJUSTMENTS SECTION TO SUBTRACT ANY COSTS PAID FROM A DIFFERENT SOURCE. INCLUDE ALL DIRECT COSTS AND ALL UTILIZATION FOR BOTH INTERNAL AND EXTERNAL CUSTOMERS.

### Direct Costs

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Salaries</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Fringe Benefits</td>
<td>0.00</td>
</tr>
<tr>
<td>Maintenance Contracts</td>
<td>0.00</td>
</tr>
<tr>
<td>Repairs</td>
<td>0.00</td>
</tr>
<tr>
<td>Technical Supplies</td>
<td>5,059.00</td>
</tr>
<tr>
<td>Travel</td>
<td>0.00</td>
</tr>
<tr>
<td>Other</td>
<td>500.00</td>
</tr>
<tr>
<td><strong>Total Costs</strong></td>
<td><strong>5,559.00</strong></td>
</tr>
</tbody>
</table>

**EXAMPLES OF DIRECT COSTS:**

- **Salaries**: After listing all permanent full time employees on the Facility Setup or Rate Name Setup Page, you would also list all temporary employees on the Salary Detail tab of the Rate Request Form. List their percent of effort they are working on the service regardless if they are paid by the service center project ID or not. If they are NOT paid by the service center project ID, you would list all individual salaries and associated fringe benefits as a credit on the Direct Cost Subsidy line along with all other costs the service center project ID is NOT paying for.

- **Fringes**: Once you choose the employee type on the Facility Setup or Rate Name Setup for all Permanent Full Time Employees and on the Salary Details tab of the Rate Request form for Temporary Employees, once the percent of effort has been entered, the system will calculate the associated fringe benefits based on the Employee Type you entered.

- **Maintenance Contracts**: Enter the total annual costs of maintenance contracts directly related to the service. Consider maintenance on scientific equipment, agricultural equipment (combines or tractors) used in the field, microscopes, spectrometers, or any other equipment that is directly related to providing the service.

- **Repairs**: Enter the total annual costs for non-routine repairs that relate directly to items used in providing this service. Examples might include repairs to combines, scientific equipment, vehicles, etc.

- **Technical Supplies**: Enter the total annual costs for technical supplies used in providing this service. Examples may include pipettes, syringes, special chemicals and other expendable supplies under $5000 that are directly related to the service being provided. NOTE: Office supplies are a component of departmental administration, and therefore cannot be included as a direct charge.
• **Travel**- Enter the total annual costs for travel directly related to providing this service. This may include the costs of travel and lodging for training seminars or conferences of service center personnel directly related to their work. Describe the Travel costs on the Rate Request Form in the section provided.

• **Other.** (Please describe the “Other” Costs). Enter the annual total for any other expenses directly related to providing this service. "Other" examples may include printing, freight charges, and equipment software.

NOTE: Administrative positions such as secretaries and bookkeepers that do not devote a significant amount of their effort to service center related activities would be reimbursed through the year end F&A allocation back to the colleges and are not allowed to be considered a direct cost on the service center. They would not be considered a direct cost if their role is not technical in nature.
**ADJUSTMENTS SECTION:**

- **Over/Under Applied Costs:** Enter the over or under applied costs of the previous period. Over applied costs are direct costs that were over-estimated on a previously approved rate form and charged to customers. Over applied cost may have occurred when overestimating direct costs were too high or estimated utilization was too low for your service center. It is critical that the service center track their utilization and expenses to assist in determining the over or under applied costs. For all internal customers, the service center cannot have more than a 60-day balance. For all under applied costs, you would show a positive figure and for over applied costs you would show a negative figure.

- *(You are allowed to keep the amount you charge external non federal customers that is over the calculated federal approved rate.)*

- IF YOU HAVE ANY QUESTIONS ABOUT CALCULATION THE OVER/UNDER APPLIED COSTS, PLEASE CALL THE OFFICE OF COST ANALYSIS.

- **Direct Cost Subsidy:** Identify and subtract the total amount of costs paid by another source (e.g. another project ID or ledger) and list the project IDs that paid those costs or that supplied the funding to the service center. Direct Cost Subsidies should only happen in services taken place in lower ledger 3 and ledger 4 project IDs as upper ledger 3 projects are self-supporting trust funds and should pay for all their costs and not be subsidized by any other funding source.

---

![Adjustments Table]

<table>
<thead>
<tr>
<th>Adjustments</th>
<th>Direct Cost Subsidy (only applicable to lower level 3 Project ID’s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over/Under Applied Costs</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Adjusted Costs:</td>
<td>38,195.52</td>
</tr>
</tbody>
</table>

**Usage**

221450
**USAGE SECTION**

**UNIT OF MEASURE**- Enter the basis or unit of usage applied in the service center's billings, i.e. "hours", "CPU hours", "number of samples", etc. On what unit of activity will you base your charge to customers? It is important to enter this information.

**TOTAL OF SERVICES “UNIT OF USAGE” IN A YEAR**- Enter the actual number of hours, samples etc for the service for the upcoming year.

**BASIS USED TO ESTABLISH UTILIZATION**- Please list what basis you used to determine the current year utilization i.e, prior years daily logs, average of last 3 years daily logs.

**RATE SECTION**

The Initiator should put in the Desired Rate Effective Date.

- **Rate**—The system will calculate the Total Cost Calculated Internal Use Rate and the Total Adjusted Costs/Subsidized Internal Rate.

- **Requested Internal Rate**—This must to be completed. Unit may charge what is calculated or the unit may request to charge a lower internal rate ONLY if non-federal external customers pay more than the total cost and that amount is used to cover the difference to internal users. If the unit wishes to charge a rate lower than the Total Adjusted Costs/Subsidized Internal Rate and the condition listed above is met, it should be listed on the “Requested Internal Rate-Below Adjusted/Subsidized Rate”.

<table>
<thead>
<tr>
<th>Rate</th>
<th>Desired Rate Effective Date: 11/01/2015</th>
<th>Total Costs Calculated Internal Use Rate: 39.50 (47,369.74 / 1200)</th>
<th>Total Costs/Units of Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Adjusted Costs/Subsidized Internal Rate: 30.16 (36,195.52 / 1200)</td>
<td>Total Adj Costs/Units of Usage</td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Requested Internal Rate Below Adjusted/Subsidized Rate: 30.00</td>
<td>NOTE: Unit may request a lower internal rate ONLY if external customers pay more than total cost and that amount is used to cover the difference to internal users.</td>
<td></td>
</tr>
</tbody>
</table>

Rate Effective Date: 11/01/2015
Rate Expiration Date: 11/01/2017
Approved Use Rate: 30.00
Facilities/Equipment Tab:

Facilities Information—Once the Initiator has completed the Salary Details and Rate Request form, the form cannot be submitted until the Facilities/Equipment tab is completed. Search feature allows Initiator (or any approver) to search for the Building this service takes place in. It also allows for the search of the valid rooms in that particular Building. The Initiator should list the percent the service takes place in that particular Building/Room keeping in mind that no space can be allocated more than 100%. (NOTE: All activities in the room need to be considered when listing % Utilized by Service).

The Initiator must validate the information by clicking the check box beside the “Facilities Information below is correct or the service does not take place in NC State owned space” even if there is no facility the service/rate takes place in.

• Equipment Information—If there is any equipment used in the service rate, the Initiator should enter the Tag Numbers. A search feature will aid in this selection. Once the tag numbers are entered, the Asset ID, Description, Project IDs, In Service Date and Useful Live will be populated.

• The Initiator must validate the information by clicking the check box beside the “Equipment Information below is accurate or no capitalized equipment is used in delivering the service” even if there is no equipment.
**Comments Tab:**

- Any comments can be added to the comments tab. We encourage the use of this comment section as this is the place to put any information the reviewers/approvers of the rate form(s) need to know.
APPROVALS

Once all tabs and all information has been updated/entered, the Initiator may submit the rate for review and approval. The workflow will be based on the roles set up by the Service Center Administrator in the Facility Setup Page.

- There will be no auto approve for any approver other than the initiator who is also the next approver in workflow which is the SVC Director. If an individual has multiple roles, s/he will have to approve each role instance.
- Rate Requests form can be denied at which time the rate goes back to the Initiator for revisions and resubmission.
- If Facility has multiple rates, this process needs to be done for each rate.
SPECIAL FEATURES:

• There are Print, Copy, Attachments, Delete and Guidelines buttons on the Rate Request form that allow the user to perform any of those functions.

• Print—Ability to print form once the form is saved.

• Copy—Can copy any rate form that has been final approved – if user has access to the form. This allows the initiator not to have to re-enter all information on a revised rate submission. However, certain tabs will have to be updated (i.e., Salary Details and Facilities/Equipment).

• Attachments—Allows unit to attached any applicable documentation even after final approved.

• Delete—Allows Initiator to delete a rate form (or any user having access to the form until the form has status of “Complete”

• Guidelines—Link to OCA website for Service Center information.

• If you need assistance with the development of a Service Center Use Rate, please contact 515-8808. More information can be accessed on our website at:

• http://oca.ofa.ncsu.edu/service-center/

• Please remember that it is the Department / College’s responsibility to monitor and keep accurate accounting records for all Service Centers.
Anyone that has basic financial system access can access the Overview tab.

A user can search by Facility Code, Facility Name, Department, Status, Project ID.

If a user wants to see all facilities at the university, do not select any criteria and hit the search button. This will bring up all service facilities at the university.
Upon clicking a particular row of Facility Code/Project ID combination, one will see the following:

Rate Code, Rate Status, Rate Name, Project ID, Rate, Effective Date, Expiration Date, Whether the Rate charges Contract and Grant Projects, Request ID # and a summary of the service center space such as Building #, Building Name, Room #, and % Utilization.

**Questions: Contact the Office of Cost Analysis at 515-1885**

2019/03/26