Service Rate Database

Tutorial (Includes Screenshots)

The Service Rate Database can be accessed online at the following link. **NOTE:** Database is best viewed using either Google Chrome or Mozilla Firefox browsers.

http://servicerates.research.illinois.edu/

- Login with NetID and Password (Shibboleth) are required for all users.

Sections:

- **Service Rates Tab:** Main page where users will have access to view all Service Rates that have been entered into the system.
- **My Funds Tab:** Shows Department Contact personnel the Fund(s) that they currently manage. This is also where new Funds will be set up.
- **My Rates Tab:** Shows Department Contact personnel the Service Rate(s) that they currently manage and where new Services will be set up.
- **Add Batch Tab:** Allows users to set up Funds and Service Rates in a Batch style process.
- **Users Tab:** Allows Departmental Contacts to add personnel by entering Name or NetID.
- **Help Icon:** Contains email link, Resources page, FAQ's, and Field definitions.

NOTE: Any changes to either a Fund or a Service Rate will trigger a certification pop-up box. The certification will only occur one time per day and will serve as acknowledgement of changes made and agreement with certification language.

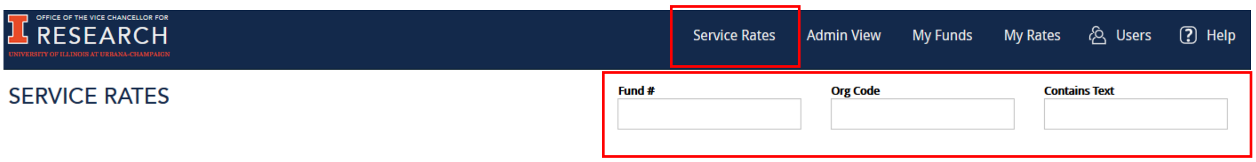
*** Questions about the database can be sent to - spaservicerate@illinois.edu.

Service Rates Tab:

- Main page where users will have access to view all Service Rates that have been entered into the system. Information includes:
  - Fund
  - 3 Digit Org Code responsible
  - Fund Business Contact and Technical Contact info including name, {email and phone – will show upon hover over name}
  - Service Description
  - Basis
  - Internal Rate

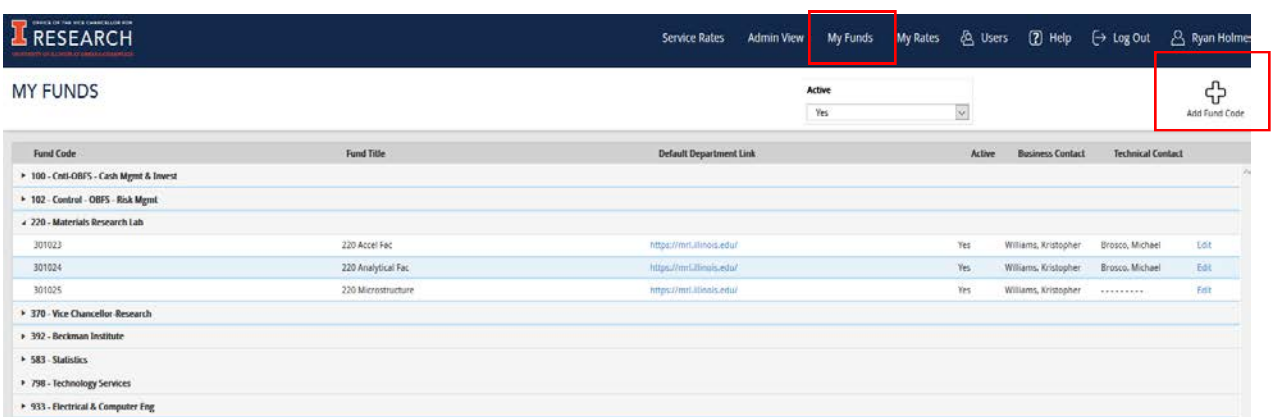
- External Rate (if applicable)
- Rate Begin Date
- Rate End Date
- Future Rate Indicator (if applicable) - icon
- Department link (if applicable)

- Users can utilize the search capabilities on Fund, Org Code, and Category/Description by entering criteria in one of the boxes at the top.

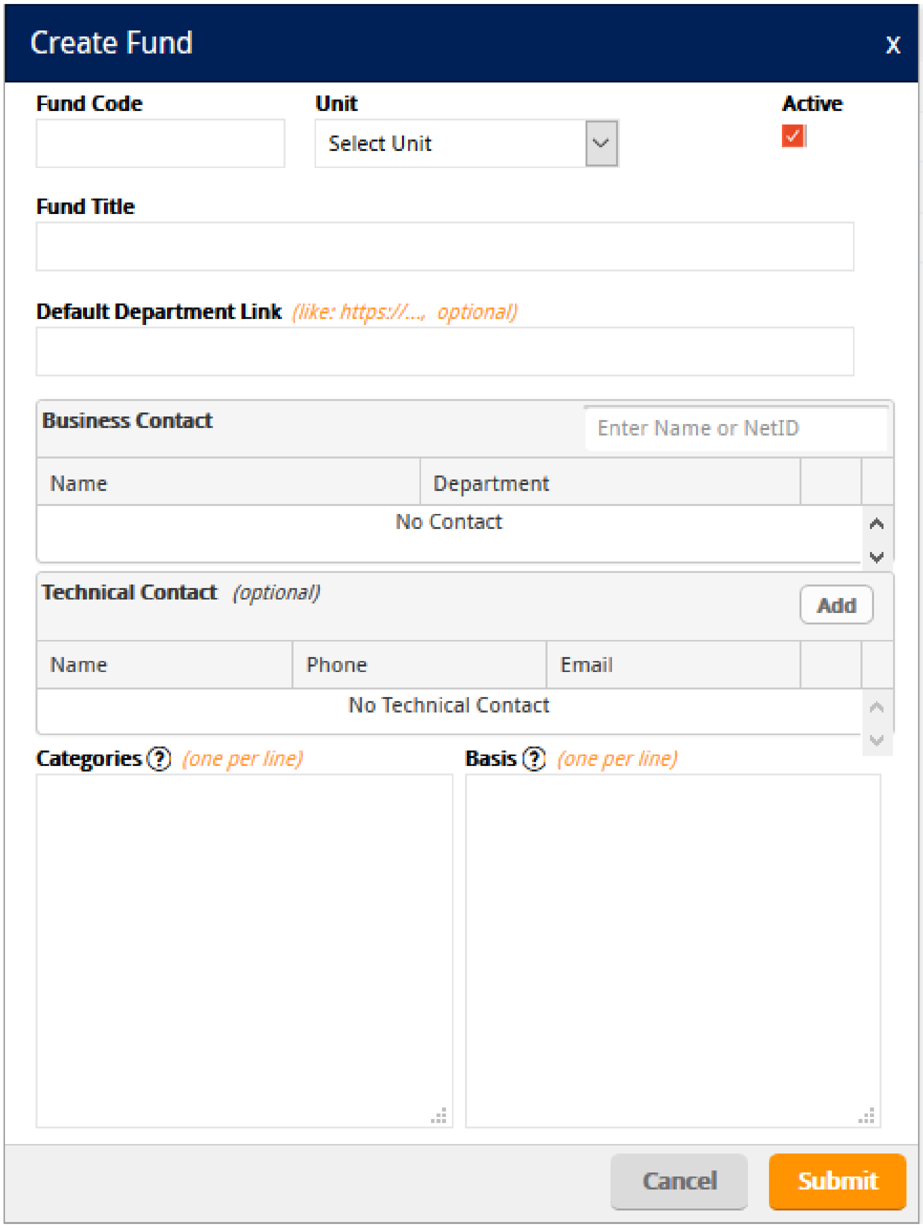


My Funds Tab:

- Shows Department Contact personnel the Fund(s) that they currently manage. This is also where new Funds will be set up.



- **<u>Adding a New Fund Code</u>:**
  - Select the “Add Fund Code” icon (Plus sign) on right-hand side of screen.

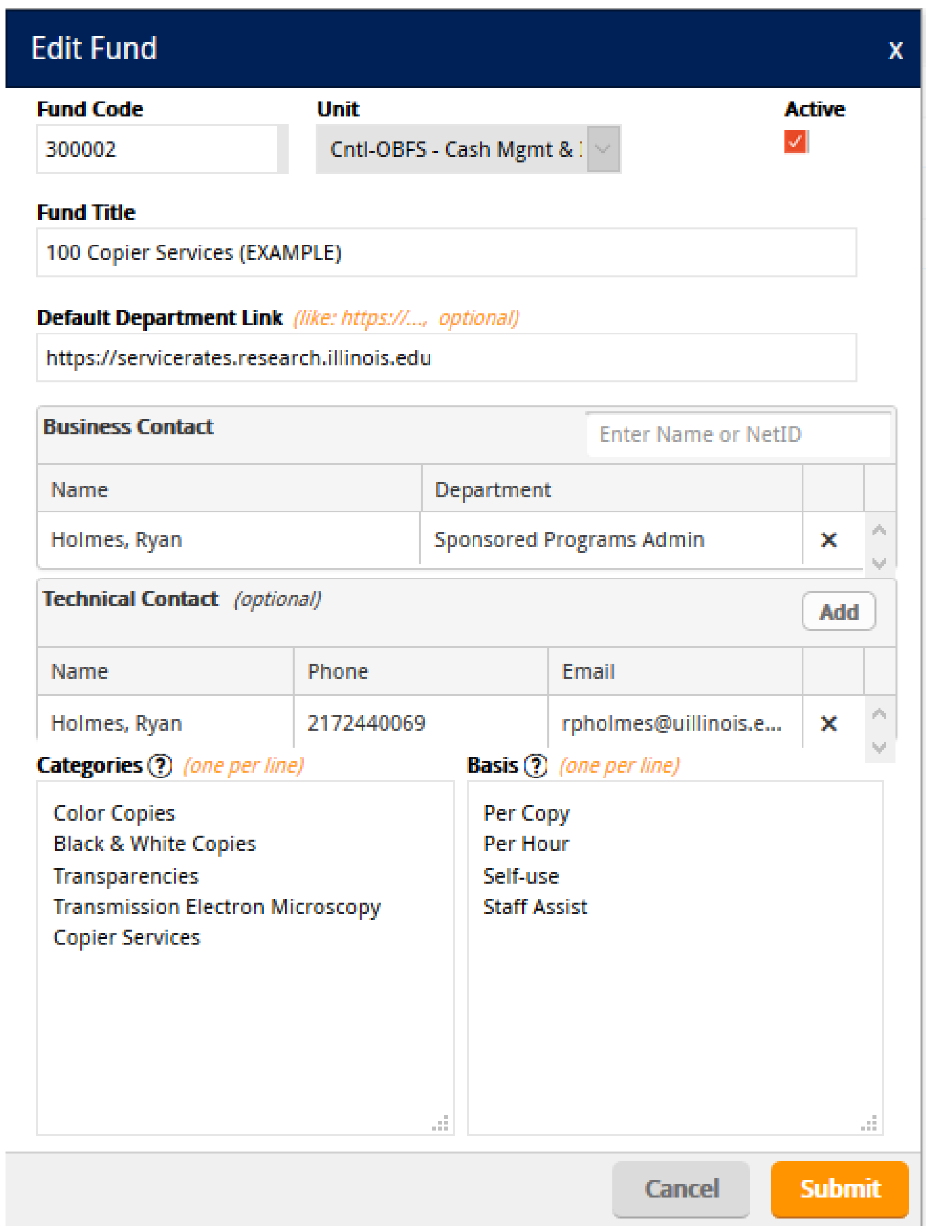


- Enter Fund Code for Service provided that matches Banner.
- Select applicable Unit from drop-down menu.
- Enter Fund Title that matches Banner Title (including 3-digit Org prefix).
- Provide Default Department Link that shows department website or Service Rate details (if applicable).
- Enter Business Contact using Name or NetID.
- Enter Technical Contact using the Add Button and follow instructions.
- Categories will be populated by each department and allows for consistency with adding new rates and for enhanced search capabilities. Categories provide

a short explanation of service category (i.e., Copier Services, etc.) that will assist users in identifying the broad nature of the fund. Limited to 50 characters.

- Basis will be populated by each department and allows for consistency with adding new rates. This serves as the explanation for how the service is charged (i.e., per hour, per copy, square footage, etc.). Limit 50 characters.
- Click Submit.

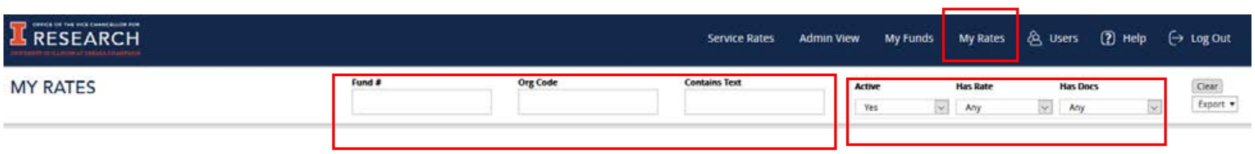
- **Edit Existing Fund Codes:**
  - Funds can be edited by clicking on the "Edit" Button at the far right-hand side of the screen.



- Provides ability to change Fund Title, update department link, and add/delete/edit Categories and Basis information.
- Business Contacts and Technical Contacts can be changed using Name, NetID, or the “Add” . **Note that only one Business contact and one Technical contact per Fund can be saved.**
- Click Submit.

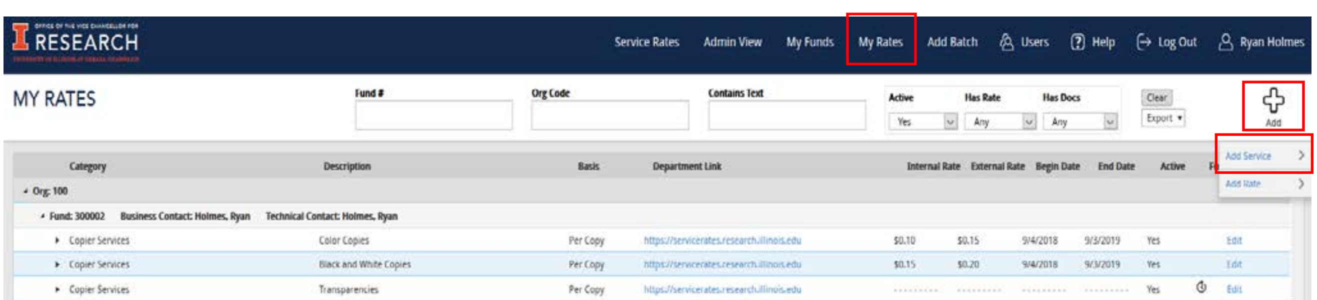
My Rates Tab:

- Shows Department Contact personnel the Service Rate(s) that they currently manage and where new Services will be set up.
- Users can utilize the search capabilities on Fund, Org Code, and Category/Description by entering criteria in one of the boxes at the top.

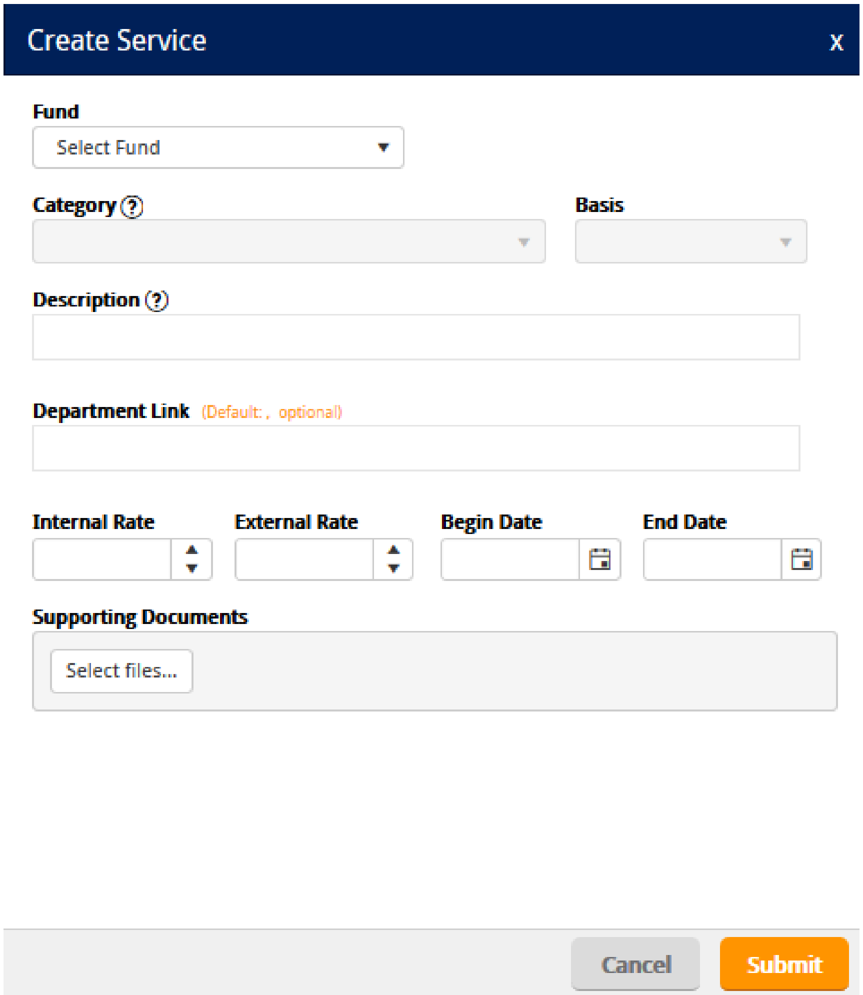


- Similar information as Service Rates Tab but can be filtered on the following criteria in order to help manage various types of rates:
  - Active
  - Has Rate
  - Has Docs

- <u>**Adding a New Service**</u>:



  - Select the “Add” icon (Plus sign) on right-hand side of screen and then select “Add Service” from drop down menu.

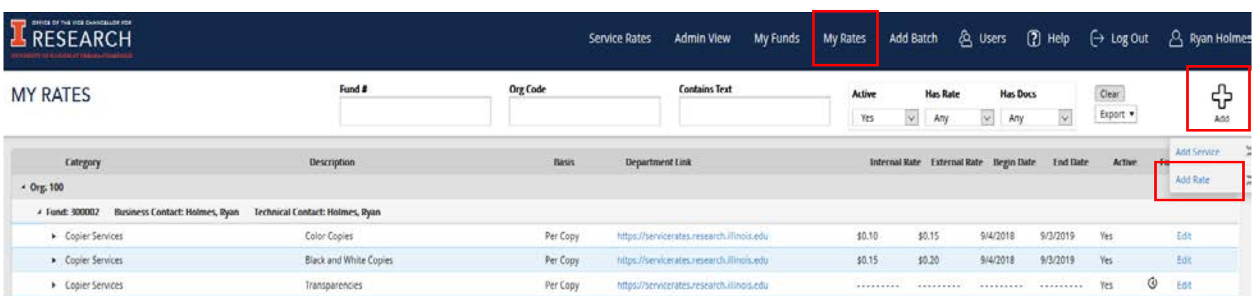


- Select the appropriate Fund from the drop-down menu.
- Select the Category of service provided. If not located, you will need to go back and Edit the Existing Fund Code as noted above. The new Category will need to be added in that screen before you can access the Category in this new "Create Service" screen.
- Select the Basis of service provided. Similar to the Category, if the Basis is not located it will have to be added via the Edit Existing Fund Codes process.
- Provide a Description for the service which describes the individual services provided (i.e., color copies, black & white copies, transparencies, etc.) under each Category that will help customer know what the service is. Limit 500 characters.
- Provide Department Link that shows department website or Service Rate details (if applicable).
- Enter Internal Rate
- Enter External Rate (if applicable)
- Enter Begin Date
- Enter End Date

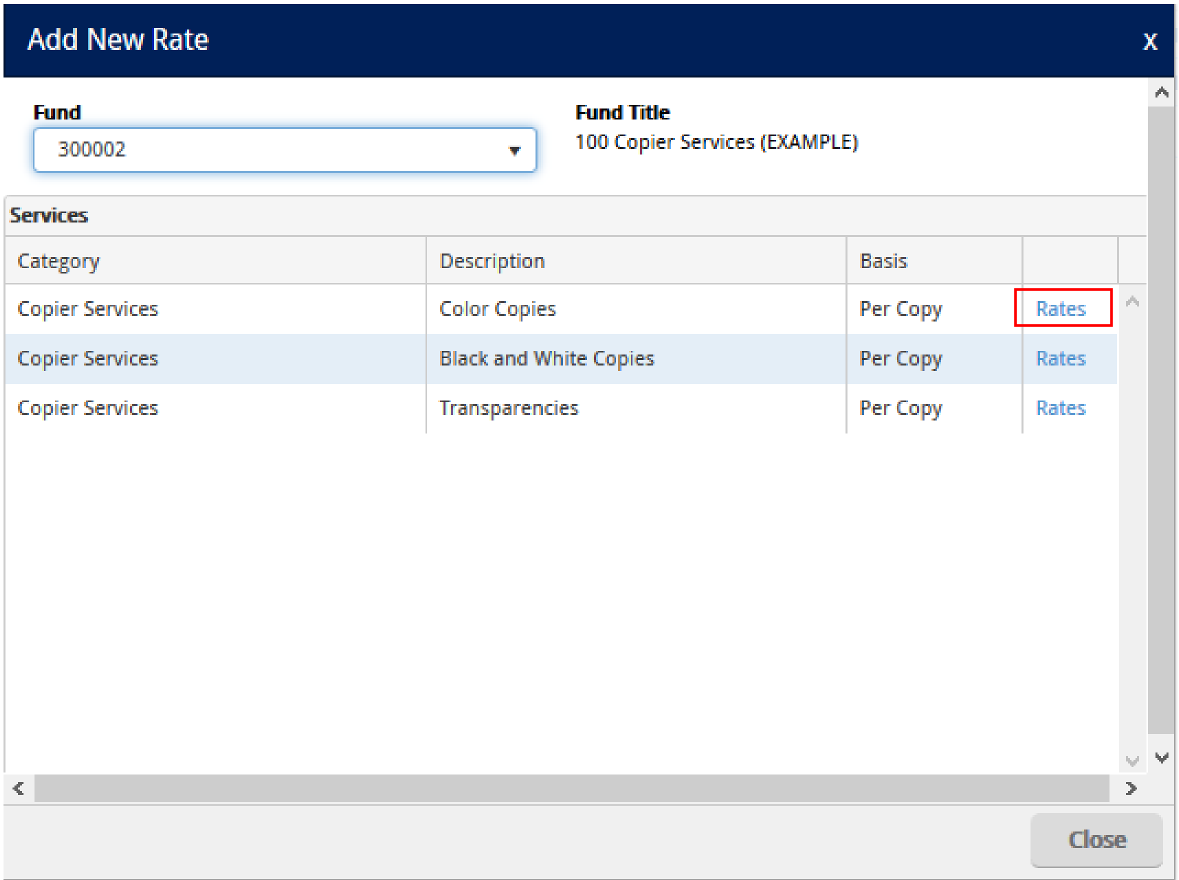
  - Users will be able to attach supporting documentation when adding new rates. This can be excel, word, .pdf, etc. type files that support the calculation for the rate added. Attachments are not required but are **HIGHLY RECOMMENDED** as this will assist in future requests for documentation and allow for a more robust and complete database going forward. If documentation is added user will see an icon like this ( ) on the Admin View Tab and also on the My Rates Tab. Note that supporting documentation will not be accessible by public users but only for Admin roles and for each department's admin users for just their Org's rates.
  - Click Submit

- **NOTE:** Begin and End Dates CANNOT exceed 2 years. This is in accordance with University Policy. See OBFS Section 22 - https://www.obfs.uillinois.edu/bfpp/section-22-self-supporting-revenue-generating/service-storeroom-activities

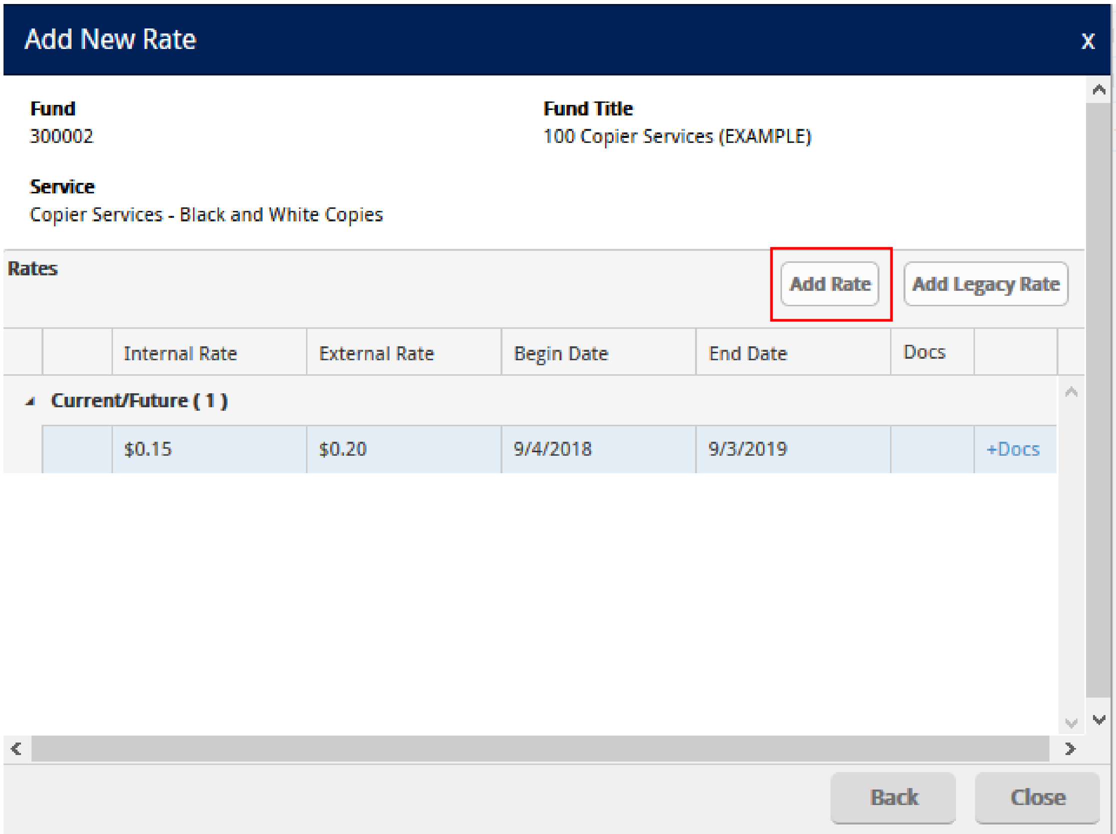
- **Adding a New Rate**:



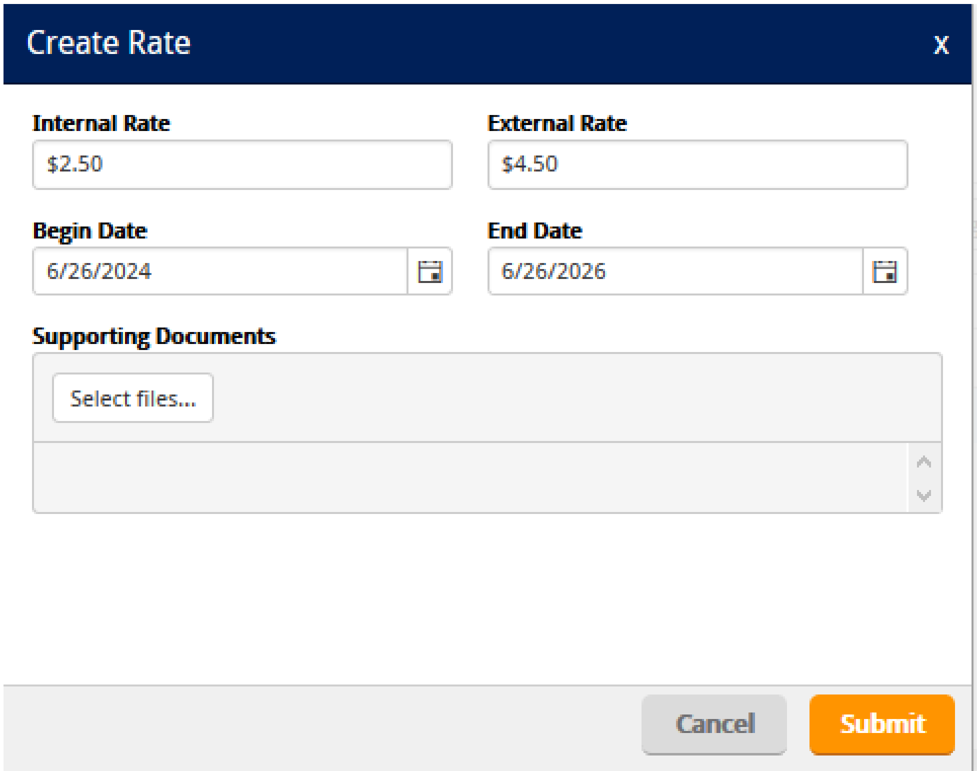
- Select the "Add" icon (Plus sign) on right-hand side of screen and then select "Add Rate" from drop down menu.



- Select the appropriate Fund from the drop-down menu.
- Locate the particular Service you would like to update and select “Rates” on right-hand side of screen.

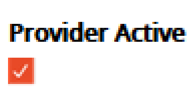


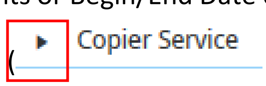
- Select the "Add Rate" button which will bring up the following detail screen where Internal Rate, External Rate (if applicable), Begin Date, End Date, and supporting documentation can be added.
- Click Submit.



- **Edit Existing Service Rate – 2 Options:**
  - **Option 1:** Rate details can be edited by clicking on the "Edit" Button at the far right-hand side of the screen.

    - This allows Department Admin Users to edit Category, Basis, Description, and/or Department link.
    - In addition, departments have the ability to mark a rate "inactive" if the service is no longer offered. In order to make this change, departments will uncheck the "Provider Active" button within the Edit function noted above. The default is for all rates to be checked when entered.

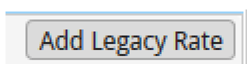


  - **Option 2:** Rate amounts or Begin/End Date can be edited by clicking on the right-facing arrow (

) next to the Service Category. This will expand that particular service to show the current (and any future rates, if applicable) rates.

  - Once expanded, the user will have the option to "Add Rate" on the far right-hand side of the screen. From there, the user can update the Internal and/or External Rates, Begin and End Dates, and also upload supporting documentation as desired.
  - When completed, click Submit and the rates will now be added to the Service Rates Tab.
    - **<u>NOTE</u>:** The Begin Date will automatically be set for the first day after the current end date. Users are able to roll this date back into the current rate period if desired. **Reminder:** Rate periods **<u>cannot</u>** exceed two years.

- **<u>Adding Legacy Rates</u>:**
  - Legacy rates can be added by clicking on the right-facing arrow next to the Service Category. This will expand that particular service to show the current rates (and any future rates, if applicable).
    - Once expanded, the user will have the option to "Add Legacy Rates" on the far right-hand side of the screen.

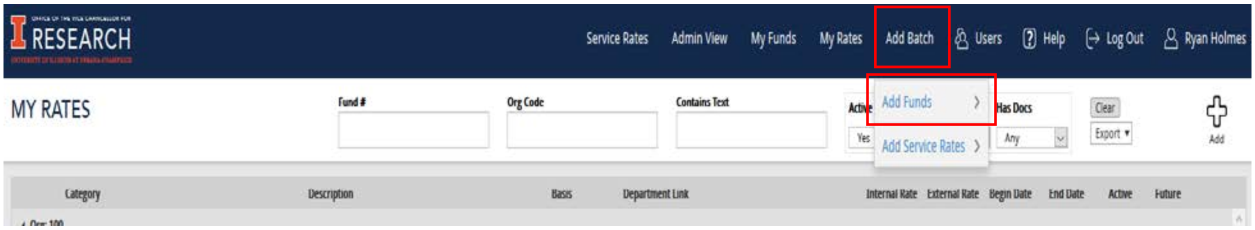


    - From there, users can update the internal and/or external rates, begin and end dates, and also upload supporting documentation as desired. Note that this information will be from past rates and can be utilized by the departments for historical information and analysis.

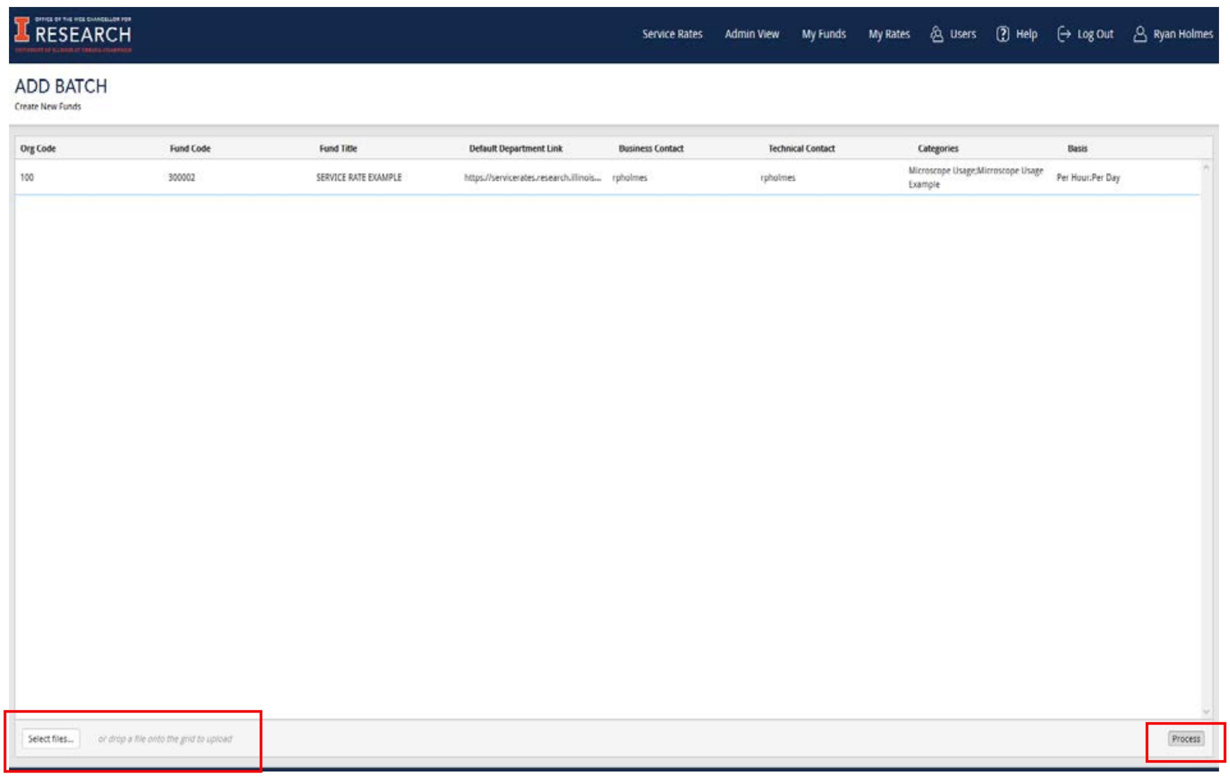
Add Batch Tab:

- Allows users to set up Funds and Service Rates in a Batch style process.

1. **<u>Batch – Add Funds</u>:**
   - Funds can be added via a Batch process using the "Add Batch" Tab on the top of the screen and then selecting "Add Funds" from the drop down menu.



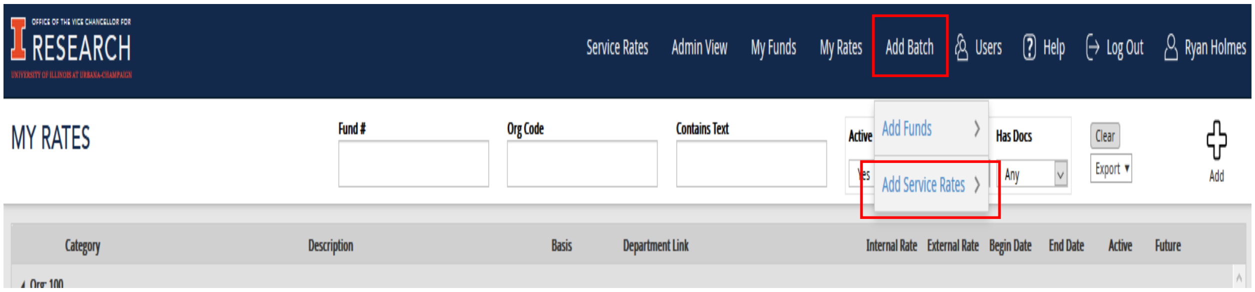
- An instructions page will be shown along with a “Download Example CSV” file that will need updated and prepared for Upload process. Once completed, the user will then “Select files” at bottom of screen (or “drop a file on the grid to upload” and click “Process” button.



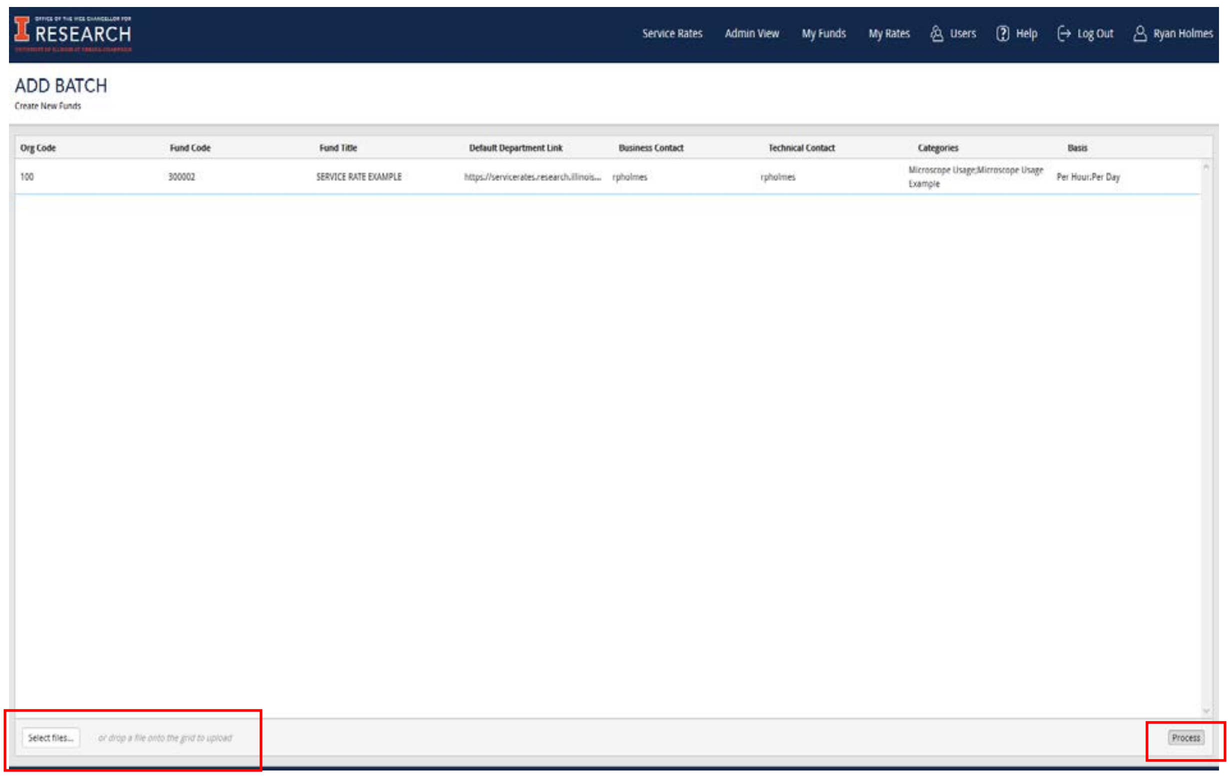
- An Upload message will be produced to indicate successful upload or to show any errors (if applicable).

2. <u>Batch – Add Service Rates</u>:

- Service Rates can be added via a Batch process using the “Add Batch” Tab at the top of the screen and then selecting “Add Service Rates” from the drop down menu.



- An instructions page will be shown along with a "Download Example CSV" file that will need updated and prepared for Upload process. Once completed, the user will then "Select files" at bottom of screen (or "drop a file on the grid to upload" and click "Process" button.



- An Upload message will be produced to indicate successful upload or to show any errors (if applicable).

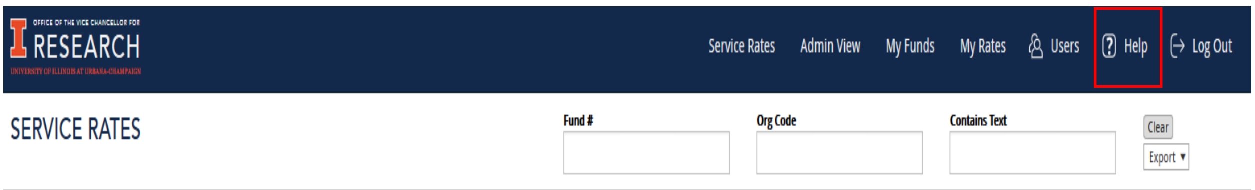
Users Tab:

- Allows Departmental Contacts to add personnel by entering Name or NetID.

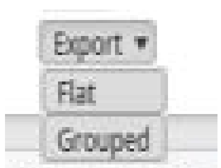
- Note that initial Department Contact loaded into the system will be the Financial Manager for each Fund in Banner.
- Edits to Departmental Contact personnel can also be made by Central Admin User Roles. If needed, contact spaservicerate@illinois.edu for additional assistance.

Help Icon:

- Contains email link, Resources page, FAQ's, and Field definitions.



Export Option:



- From the Service Rates Tab users have the ability to export the database into an Excel file by clicking the down arrow on the "Export" icon at the top right-hand side of the screen. This will give you an option to download a flat file or a grouped file.

  - Note that both options have the same information but the display in excel is different. Users will be prompted on how to save/open the file and then click "Ok.
  - If search filters were used to limit rates, only those rates will be exported. If no filters are used, all current rates will be exported.