SHREC Coordinator

Job Description

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Brief Description of SHREC:

SHREC stands for Space, High-performance and Resilient Computing. It is an I/UCRC center sponsored by the National Science Foundation (NSF) and companies/organizations/government entities interested in the research SHREC students and faculty conduct. An I/UCRC center is an Industry-University Cooperative Research Center, which just means universities and companies combine forces to achieve mutually-beneficial ends. Industry provides funding with annual memberships (ours are $40,000/year) and in return, they get access to all the research the students and faculty produce with the funds. Students get experience and often times job offers after graduation from these industry members. There are 4 universities that are part of SHREC currently. They are University of Pittsburgh (the main SHREC site), BYU, University of Florida, and Virginia Tech. Each of these sites has a PI (principal investigator). The PI at BYU is Dr. Mike Wirthlin. The PI is in charge of reporting results to the National Science Foundation. SHREC used to be CHREC, but was reformed in 2017. CHREC started in 2007. Twice a year the university PIs, select students and industry leaders will get together for a workshop (conference) at one of the universities to discuss results and propose new research projects. You will be asked to travel to these conferences. BYU currently has about 23 students employed. There is a “Master List of Students” spreadsheet on the desktop that will give you basic information on each student.

Meet People (in person, email or on phone):

- Everyone in the Electrical and Computer Engineering Office (Student secretaries, Kris, Mark, Janalyn)
- The professors that you will be working with (Professors Wirthlin, Nelson, Goeders, and Hutchings)
- Dr. Aaron Hawkins (Department Chair)
- The students that you will be working with in the lab (Room 461 and 459 CB)
- Kristi Chase: Research Accounting (ASB Building)- on maternity leave until May sometime
- Debbie Silversmith: ORCA (ASB Building)
- Lissa Camacho (Dean’s Office)
- Introduce yourself by email to the other SHREC Centers
- ECE Shop –Joe Bussio (where you will print posters, borrow carts for heavy objects, etc.)
- Other SHREC admin coordinators: Nicole works for Dr. Alan George at University of Pittsburgh; Limor works for Dr. Herman Lam at the University of Florida. VirginiaTech does not have an admin coordinator, but they have a couple people who help out with SHREC conferences. The Principle Investigator at VT is Dr. Wu Feng. Nicole works full time; Limor works 10 hours/wk.

You will contact these people if you have questions regarding these subjects:

Consult this Admin Job Description Booklet and Admin Files first ☺

Accounting/Financial: Dr. Wirthlin if you think he knows, then Mark. Contact Mark using the online ticketing system.

- Journal Entries: Mark, Kristi Chase if necessary
- Different Accounts: Dr. Wirthlin

Office/Department: Student Secretaries, then Kris Bess

Engineering Dept/EB Building: Lissa Camacho

Y-Expense: Student Secretaries, then email Y-Expense help desk

Travel plans/itineraries: Karen Brereton

CCL Wiki: Andrew Keller (Phd Student)

Moving heavy/multiple items: Joe Bussio

Tech/computer: Department IT group (Michael Chambers and students). Use Ticket system.

Immerse: Dr. Hawkins

Set up your Tech, etc.:

Mostly Department IT- Michael Chambers and student employees-

- Get a CAEDM account (to log in to your computer)
- Get access to Groups>EcenSec on the network
- Box Account
- MyBYU App on your phone
- Duo Account set up
- Set up a CCL/FPGA account for Wiki access
- Change your voicemail greeting
- Change your email signature
- Get my key on my last day
- Ask Kris to change the name on my mailbox and look at copy room supplies
- Put in financial ticket to get access to Bob reports for SHREC accounts
- Get access to Rec 02 list from Kris Bess
- Ask Kris to order you a new name plate for your door and your desk
- Financial Ticket: getting access to proxy for professors in department on Y-Expense

NSF I/UCRC materials

(don't worry about reading these until after you have read this "How to" document, just background info):

- General I/UCRC background
  - https://www.nsf.gov/eng/iip/iucrc/home.jsp
- CFP for I/UCRC (specifically the one we implemented)
  - https://www.nsf.gov/publications/pub_summ.jsp?WT.z_pims_id=5501&ods_key =nsf17516
- Visit the SHREC website and carefully review the materials on this site
  - www.chrec.org
  - Members Only section: (username: chrec password: RTL128HLS512)
- BYU's SHREC Proposal: https://nsf.gov/awardsearch/showAward?AWD_ID=1738550&HistoricalAwards=false

Regular Weekly Duties:

These will be your regular duties weekly, but other things will crop up all the time. <u>For a full list of tasks by the frequency in which they occur, see the word document in Admin File>#7>Shrec admin assistant>Tasks by days of week.</u>

- Mondays
  - Check my email and catch up with items that happened over the weekend
  - Order donuts and bagels for lab meeting this week (fall and winter semesters)
  - Meet with Dr. Wirthlin
- Tuesdays
  - Check Weekly Reports
- Wednesdays
  - (For the summer) Go to IMMERSE Meetings
- Thursdays
  - Go to the SHREC/CCL lab meeting (right now 11AM Thursdays)
  - (BI-WEEKLY) Record in the excel doc "SHREC Student Hours" and submit student time cards. Email will come in to tell you to approve the hours. Email goes to whatever account BYU has on file for you, sometimes your personal email.
- Fridays
  - Complete weekly projects
  - Update your hours for next week on the CCL Wiki; keep Dr. Wirthlin in the loop if any significant changes

Wikis:

I did not know how to create Wiki pages before I started this job. I learned how to create and edit wiki pages from the grad students (specifically Andrew Keller) and by going to https://www.dokuwiki.org/dokuwiki# Whenever I don't know how to do something that someone has done on their page, I usually just copy their code and change the specifics to what I need.

There are 3 wiki sites you will see in this job. The one you use mostly is the CCL wiki (link in Helpful Links section of this guide).

On the CCL wiki, make yourself a Wiki page in the Admin section of the CCL Wiki and delete the old Admin page. Instructions are listed below.

Include on the page:

- Your name
- Job title
- A picture of you
- Your contact information (BYU Phone, BYU email, Office number, and I put my cell number on as well in case someone really needed to get ahold of me.)
- What hours you work each week
- What time you take lunch each day
- When you are taking vacations

If you ever need to adjust your hours, then edit that down on your Wiki page.

You will be keeping the Wiki pages up to date. One thing that you need to do with this is that you will need to check the student Wiki pages on the CCL Wiki and make sure that they have current information on them. You should check to make sure that each student has:

- His/her picture
- His/her contact information (phone # and email)
- A section for Weekly Reports. The Weekly reports should include the following information:
- Dates for the week you are reporting on (The previous Monday through Friday)
- Summary of activities worked on (Green)
- Major milestones achieved (Blue)
- List of goals for the next week (Red)
    - Most students will color code their weekly reports (with the colors above that are in parentheses next to each point), but it is not a requirement.

If a student is missing any of this information, you should email the student and ask them to update their Wiki page.

You will also be in charge of updating different parts of the Wiki.

You will need to help Professor Wirthlin update the "Lab Wirthlin meetings" section of the CCL Wiki that is under the Admin tab. Professor Wirthlin will have you create a table for the whole semester with the dates of the lab meetings in it. The easiest way I found to create these tables was to click the edit button for the page, copy the code for the table for the previous semester, paste the old code above so that the new semester table will be at the top of the page, and then fill in the boxes with the new information for the upcoming semester.

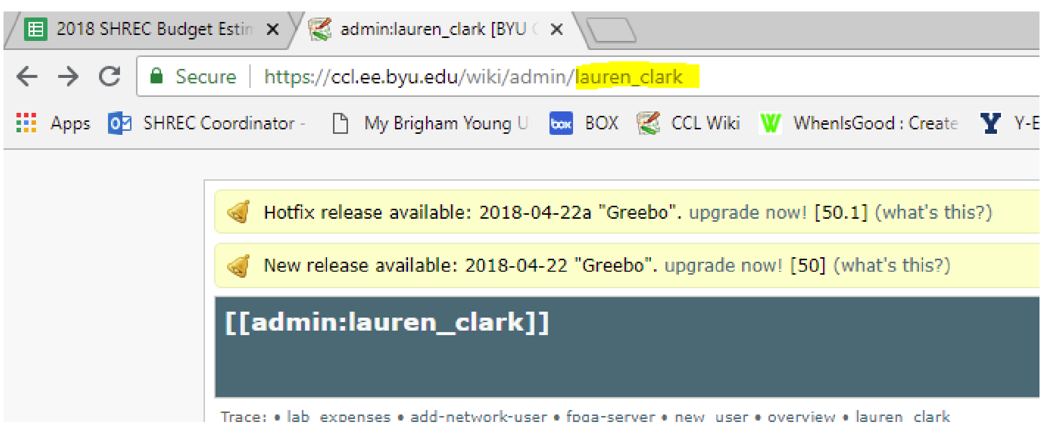
You will also need to help keep the CCL email list up-to-date on the CCL Wiki. The email list is under the "students" tab. Make sure that all the people on the list are current and add new people when they are hired to work in the lab. Most students are prompt in their response time when you email them.

1. Directions on creating a new account for a new student on the CCL Wiki and FGPA Server:

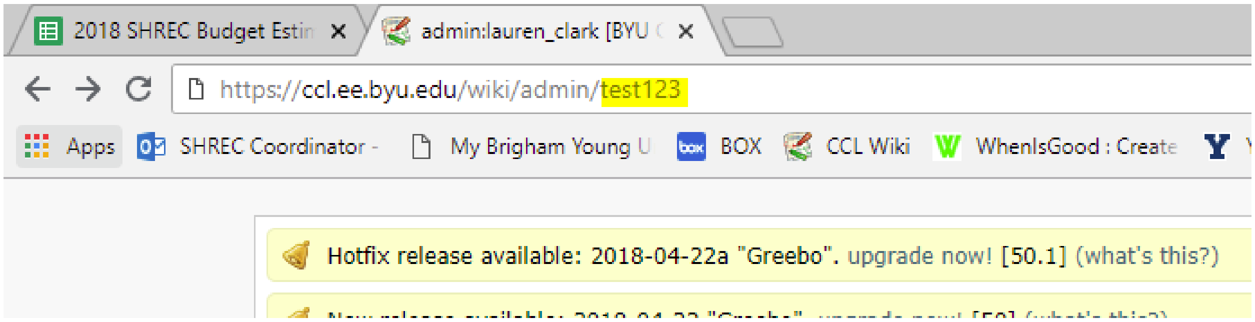
https://ccl.ee.byu.edu/wiki/howto/add-network-user

2. To create a new page on the CCL Wiki:

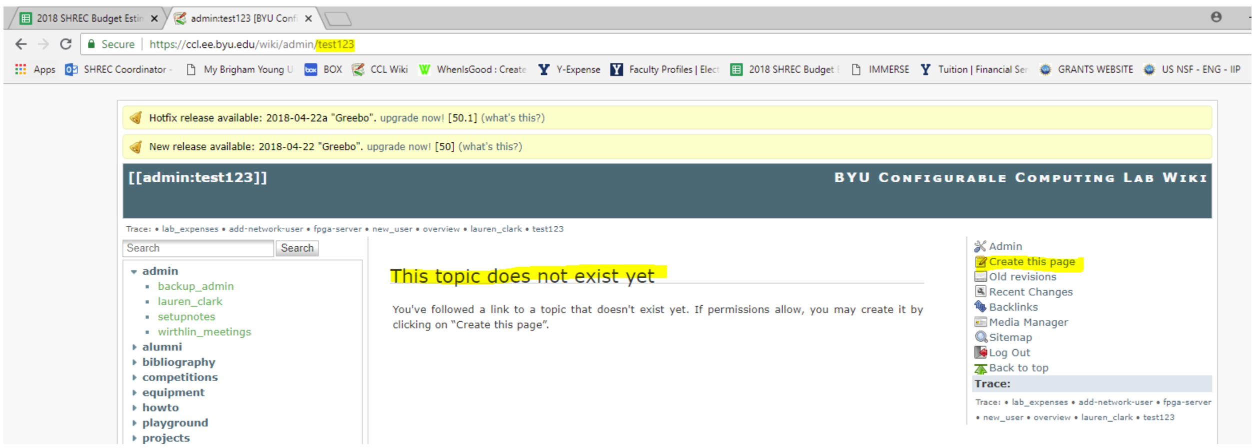
Click under the section heading you want to place the new page under ("Admin," "Alumni," Students," etc.). Go up to the web address bar and delete the last portion of the URL after the last backslash (\).



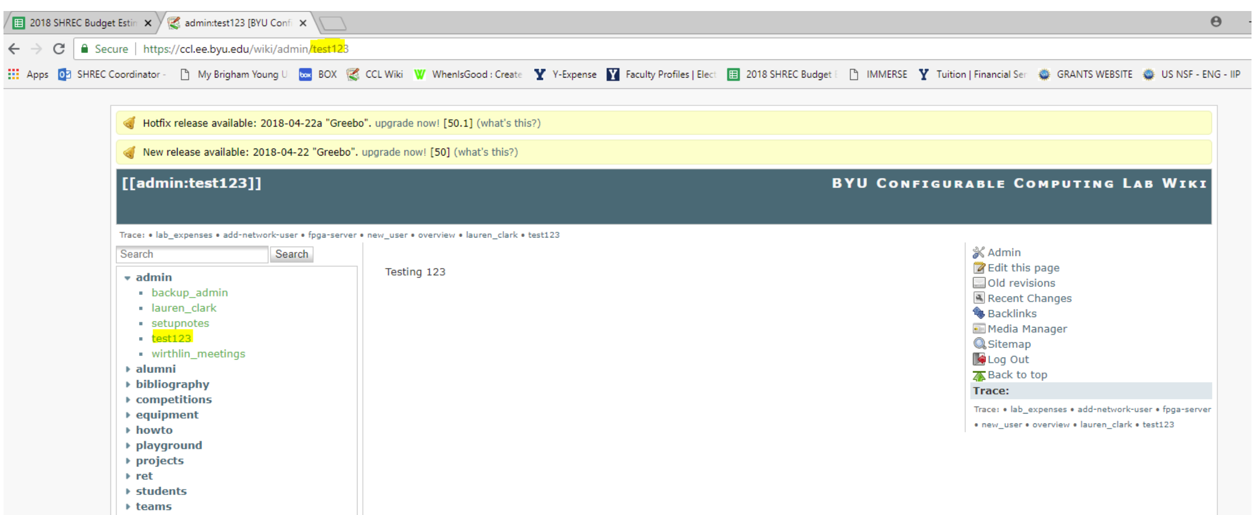
Type in what you want the title of the page to be and hit enter.



This will bring up a page that says the page does not exist. On the Right hand side, there will be a menu and one of the options will be "Create this page." Click on it.

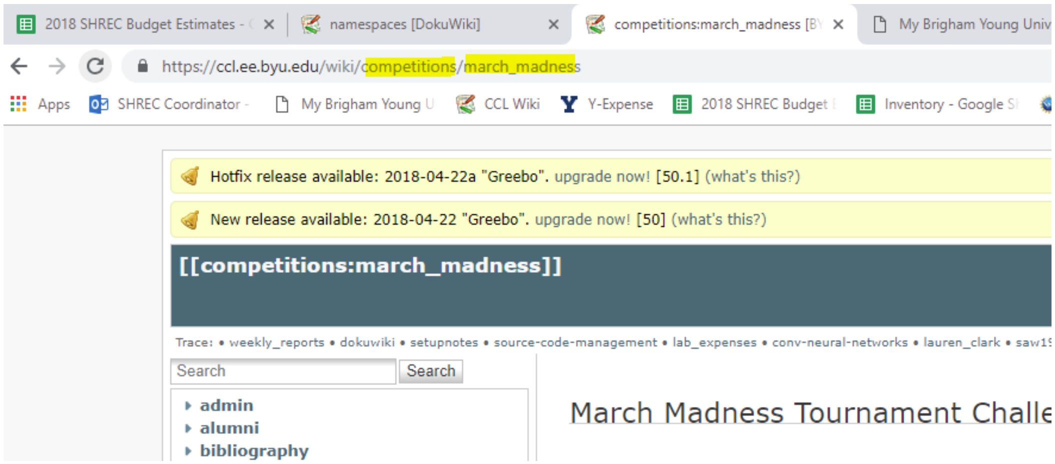


This will create the page, and you can customize it as needed. If making a new page for a student, make sure they enter the information asked of them on the New Hire Checklist (also listed below).



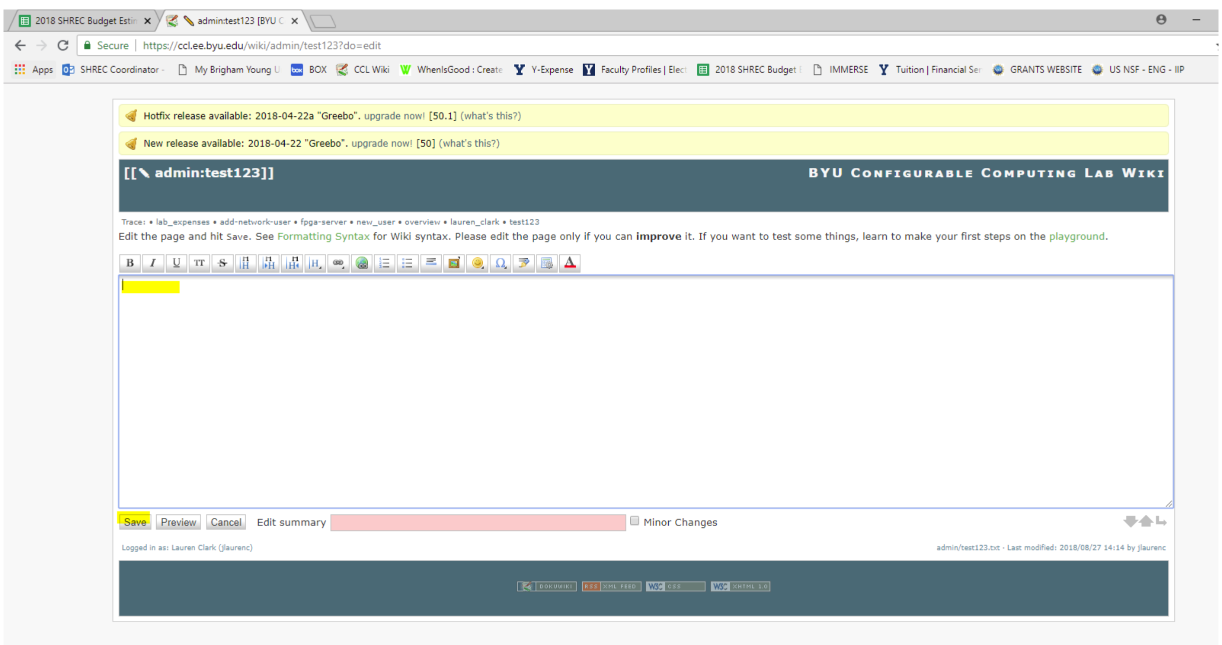
3. <u>To create a new subsection (namespace) on the CCL</u> Wiki:

Click on any page. Go up to the html in the web browser and change the current subsection and page name to what you would like the subsection and page to be called. Make sure to leave a backslash in between the subsection name and page name. Then follow the same remaining steps listed under number 2 (creating a new page).

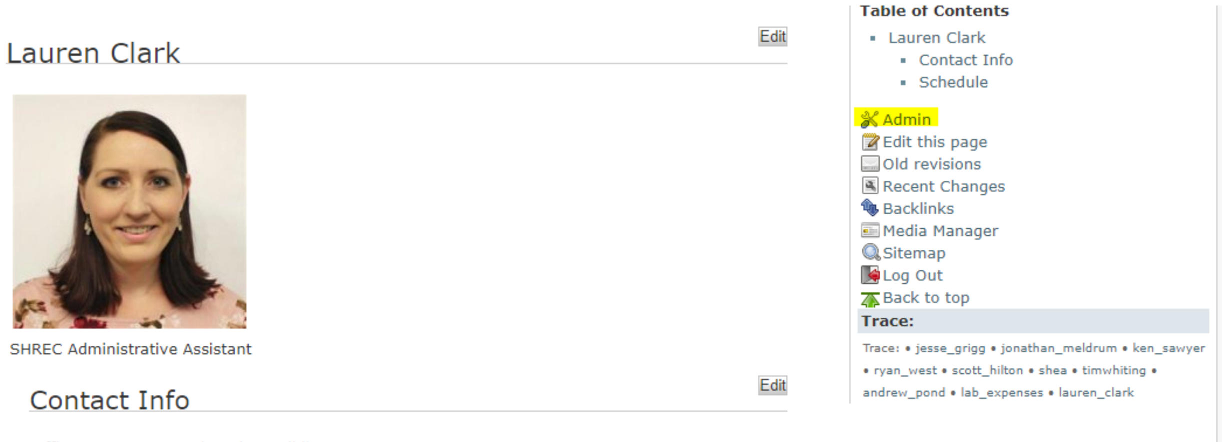


4. To delete a page on the CCL Wiki:

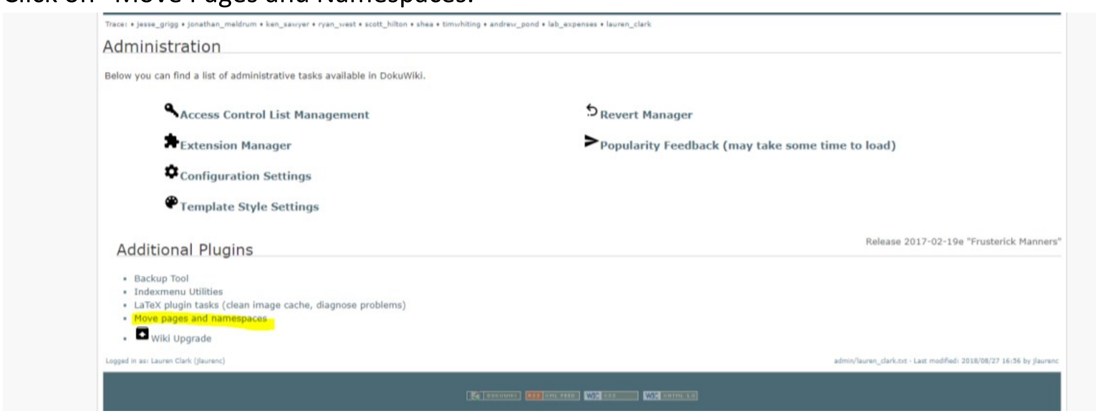
Go onto the page you want to delete. Click on the "edit" button, delete all the information stored on the page. Hit save. The page will no longer exist.



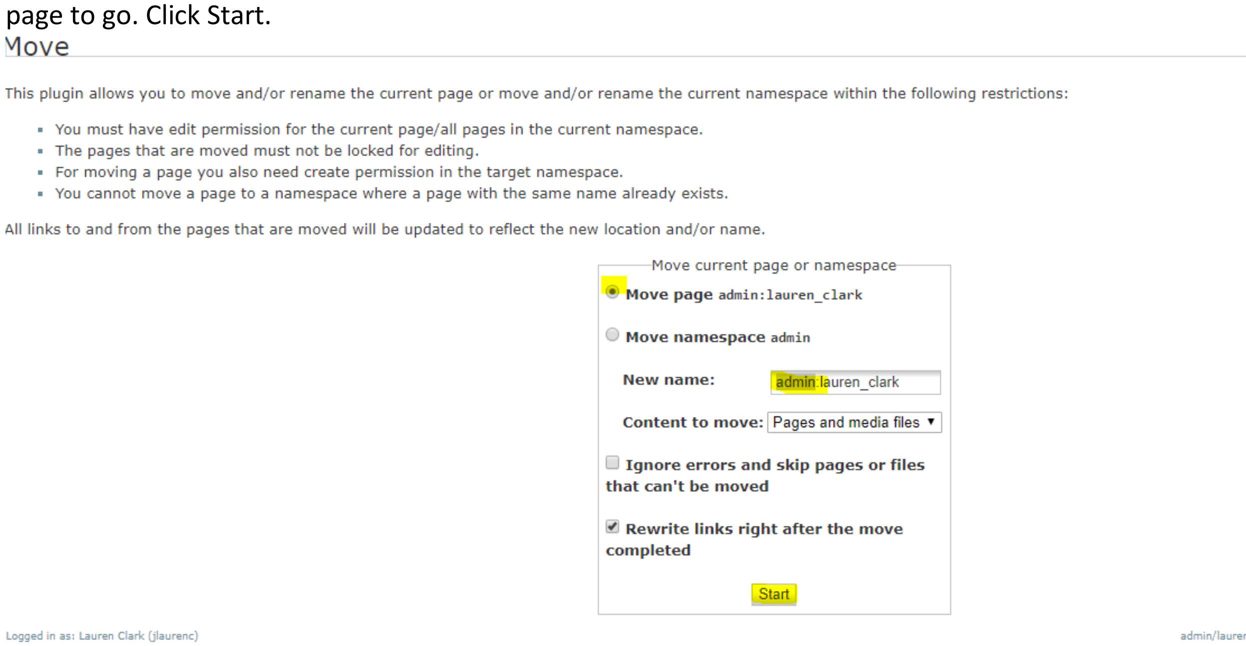
5. To move a page to a different sub-section:
Go to the page you want to move. Under the Table of Contents on the right, click "Admin."



Click on “Move Pages and Namespaces.”



Delete the section header of the page and type in the section header of where you want the page to go. Click Start.



Spreadsheets:

You will be working with/making many Excel spreadsheets and some Google Spreadsheets. Until you figure out what you would like to do that is different from the old spreadsheets, I would just copy their formatting. If you see a charge on the budget spreadsheet that you are unfamiliar with, ask Dr. Wirthlin if he knows what the charge is. If he does not know, ask Mark.

As a note, it can be difficult to get Mark to do things quickly. Mark is a nice guy and is friendly. He just has a lot on his plate, especially at right before and after a semester starts. Dr. Wirthlin knows we have to just deal with the slow pace of getting financial things done.

Emailing:

You will do a lot of emailing in this position. If you are emailing a group of students, you should put their emails in the BCC line because of FERPA issues. If I am emailing a group of professors and students I will usually put the professor's emails in the To line and all of the student's emails in the BCC line.

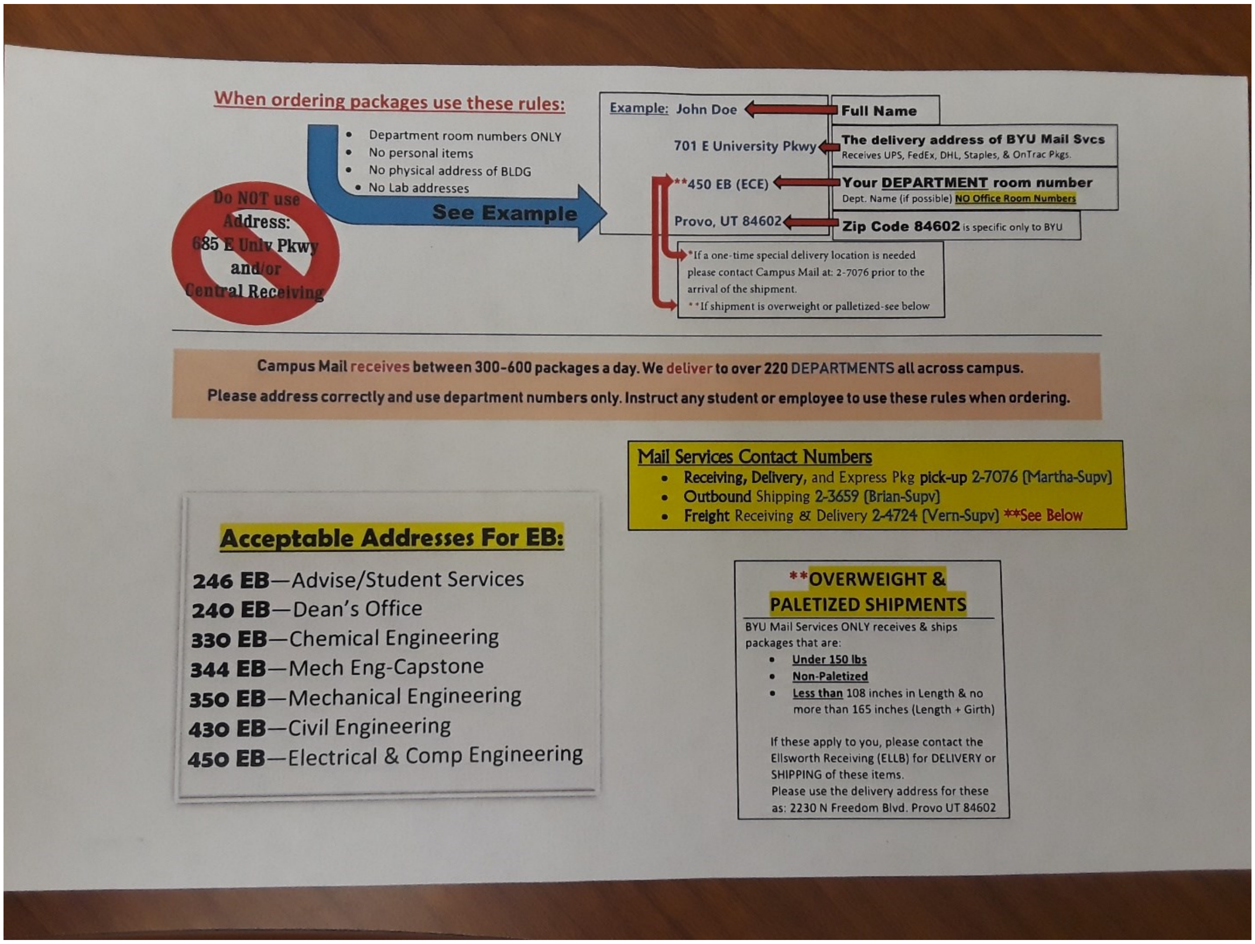
IAB Members and LISTSERV Mailing List:

BYU has a private server where email lists/groups can be created. SHREC professors and Industry members will email papers and conference information via LISTSERV.

Sometimes an email will need to be added or deleted from the mailing list. To do that, first, sign into your account (see below in the passwords section of this document). Click on the email list "CHREC_IAB_BYU." At the top left of the next page you will see the words "List Management." Click on that. Then click on "Subscriber Management." You will enter in the email you wish to delete under the section "examine or delete." You will add a new email AND name under "Add a new subscriber." Submit the change.

Purchasing:

For this position, you will be doing most of the purchasing for BYU's SHREC Center. You will do most of the purchasing with either the Electrical Engineering Campus Card or with the Electrical Engineering Mastercard or VISA. All of these cards are kept behind the front desk and you can ask a student secretary for them. I usually take a picture of the card and keep in on my phone or this desktop. If you are taking a physical card, then you will need to sign it out. If you are making an online purchase, there is a paper in a sheet protector you will need to get from the secretaries. The front of this document has all of the Mastercard information (card number, names, contact information, shipping information, and billing information) on it. On the back of the sheet there is the information for all of the different accounts that the Electrical and Computer Engineering Department has accounts for. If you need any help, the student secretaries can help you. If the account you are looking for is not listed on the sheet, the department doesn't have an account. Check the "Passwords" section of this document to see if we already have an account. If not, create one. Below is the shipping address instructions.



You will need to know what three sets of numbers are whenever purchasing something (you will enter these on the purchase order). The table below summarizes what these numbers mean.

Name	**Account Number (aka Operating Unit)**	**Account Code**	**Account Class**
Description	The account the money will be drawn from (the NSF Account is listed in the example below)	The type of expense you have (the example is a code for "supplies")	The assigned number for a specific professor (Dr. Wirthlin's number is listed below)

Example	Ex. R0112363	Ex. 6100	Ex. 19204

You will often see these numbers arranged in order with dashes in between (i.e., R0112363-6100-19204). In the example above, you would be telling the accountant you bought supplies for Dr. Wirthlin and the expense needs to be taken from the NSF Account when the credit card bill comes in. The account numbers and codes are listed in this document below under the "Expense Reports" and "Accounts" headings. The student secretaries can print you out a list of account classes if the paper copy I currently have in my files goes missing.

After Purchasing:

After purchasing something, you will have to fill out a receipt information paper (Purchase Order). You should get one of these when you check out either the Mastercard or the campus card from the front desk. The page will ask you to fill out information that is on the receipt along with a few extra details like where you bought the product, what professor it is for, and what account the purchase should be applied to. Look at all of the SHREC accounts and the stipulations attached to the account (discussed later in this guide) [is it good for international travel, can you only put wages on that account, etc], how much money is left in the account, and how much money is estimated to be in the account at the end of the year. Once you have looked over all of these variables, choose the account that you think is best for the purchase. Once you have filled out the paper, scan and email the PO and receipt to your email, staple the receipt to the back and turn it into the financials In-Box behind the front desk. Again, if you need any help, the student secretaries would be happy to help you. In short, fill out a purchase order for all purchases except those bought through Joe at the ECE shop, travel booked by Karen and BYU car rentals. Just complete a PO for things you physically pay for with the BYU or MasterCard/VISA. NOTE: Don't submit the Purchase order for food until the food is actually delivered.

Packages:

When packages arrive, the student secretaries will bring them to your office or email you that the package has arrived. If you go and get the package from the front office, sign out the package. If you remember who ordered what item, put it at their desk in the lab. If they are not in the lab, email them to make sure they know the package is there. If you do not remember who ordered the item (which is entirely likely because the students tend to order lots of things right before experiments and conferences), then send an email out to the lab using the CCL email list on the CCL wiki. Remember to put all of their emails in the BCC line. Usually, a student will either show up or contact you in the next couple of hours to pick up the package.

Travel Overview:

You will be helping with most of the SHREC travel for the professors and students. You will need to make sure that there is a Travel Authorization form that has been filled out in Y-Expense **before** you ask Karen to book flights and hotels (details on using Y-Expense Below). Everyone needs to have his or her own TA or a group travel TA needs to be filled out with all of their names on it. Professor Wirthlin will probably have you create the TA. Once the Travel Authorization is filled out and approved, you can start arranging travel. ***For student(s) traveling without a BYU employee, fill out the PDF copy of the student travel authorization and email it to Aaron Hawkins for approval. You will submit this signed PDF with the receipts the students will give you for reimbursement after the trip.

While trying to schedule travel, Professor Wirthlin will probably ask you to come up with a couple different options for the professors and/or students. Talk to Professor Wirthlin or whomever you are arranging flights for and ask them if they have a time preference/constraint on when they need to arrive and depart from their destination. Ask them if they want a hotel, rental car, shuttle, etc. booked as well. The preferred airline is usually <u>Delta</u> and the preferred hotel is usually a Marriott, but you should ask them if they have preferences. Once you have figured out the timings that the person is interested in, call or email Karen Bereton in the travel office and ask her what the price would be for the different options. Once you have this information, pass it onto Professor Wirthlin/student traveling and they will make the final decision about flights. Once you have that approval, you can ask Karen to book them.

If the professors end up not flying with the students for an away SHREC conference, you will most likely be asked to fly with the students to make sure that everything goes smoothly and that everyone gets there and back in one piece.

Karen is nice to work with because you do not need to provide as much information to her about the people that are going. If the people that you are booking the flights for have travelled using the BYU travel office before, then she will be able to pull all of the information that she needs herself. If they have never flown for school-related activities that have used BYU Travel, **then you should provide her with their name, birthdate, and net ID information.** Karen is great. She will help you book flights, hotels, rental cars, etc. Make sure that you not only have the <u>travel authorization number</u>, but the <u>account number</u> when you call Karen. Have Karen email Professor Wirthlin the travel itinerary as well as having the itinerary emailed to you.

<u>Karen likes to be called</u> when you make a travel request, not emailed. She likes to chat a bit.

- Karen Brereton – BYU Travel
    - karen_brereton@byu.edu
    - Extension 2-7160

Travel Authorizations in Y-Expense:

Y-Expense is the BYU system you will use to arrange travel authorization, create expense reports and reimburse people for anything they purchase with personal funds that is for department use. The office of purchasing and travel offers a great training on Y-Expense, which I recommend attending. You can sign up for a training session on the Y-Expense homepage. Click on “Y-Expense Training” in the middle of the page. Here are some general instructions to get you by until the training.

The FIRST Thing you must do when you log in is select who you want to proxy for. Otherwise, you will be creating a travel authorization or expense report for yourself.

FOR ALL TAs:

After selecting a proxy and letting the page load, click on “Start Travel Authorization.”

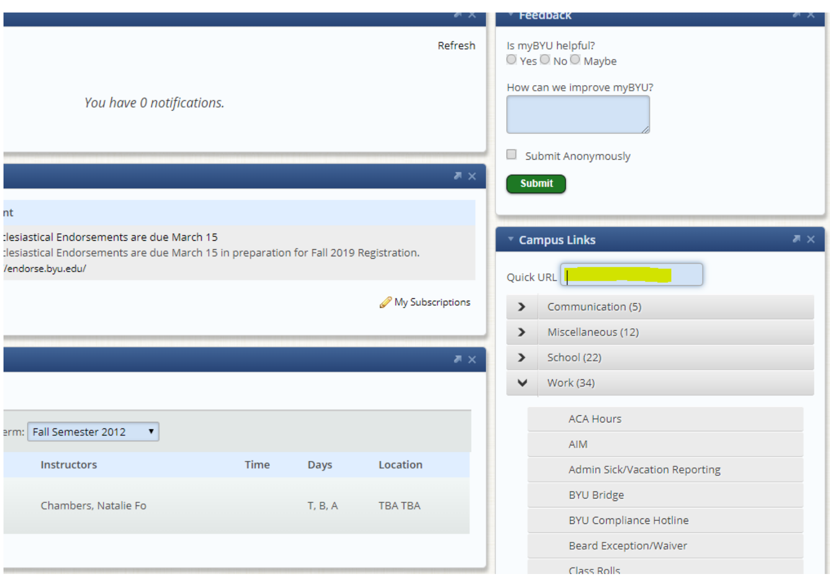
Follow the instructions for the three steps of creating a TA according to the type of travel:

TA for BYU Employee/Professor traveling alone:

If the traveling will be less than 30 days, select the travel type "Individual Travel" (as opposed to "Extended individual travel") on "Step 1."Fill out all required information. If it is "optional," don't fill it out. You do not need to upload any attachments or itemize what you think the professor's expenses will be. Just give an estimated guess what you think the total estimated cost will be (Google some of the flights, hotels, etc. to get an idea for price). As a side-note, cash advances are not allowed on this type of travel. They are allowed on group travel. The professor will need to tell you to what account number to charge the trip, or may ask you which account could handle the expense. Make sure to read the notes on the account restrictions (under the "Accounts" section of this document.) Each account has specific restrictions depending on if it is money from the government, research funds, etc. Some accounts restrict international travel, for instance. After step 3 is completed, submit the TA for approval. The professor you proxied for will receive an email that you have submitted the TA. He/She will also get an email when the TA has been approved. You will probably also get the email when it has been approved (usually 2-5 business days) and can then start working on arranging travel reservations with Karen. Karen will send you and the professor an email when the reservations have been booked. If you only request Karen books you a flight and later the professor needs a hotel to be booked, too, it is not a problem. Just let Karen know to add the hotel to the travel plans for the flight already booked (give her the TA number.) She will send you and the professor an updated travel itinerary.

TA for Student(s) without BYU Employee/Professor Accompaniment:

Have each student traveling (Or you can) fill out the PDF form "Student Travel Authorization", or if it is a group traveling, have all the students listed on one "student travel authorization" form. It is easier if you fill out the form. To get the information you need regarding the student, like their address, go to MyBYU, campus links, and in the search box, type in Rec02.



For the form, go to the Y-Expense homepage, and click on the link “Student travel authorization” on the lower right side of the page. This will bring up a pop-up window that will have a link to 2 PDFs. Sometimes you just need to fill out just one of the PDFs, sometimes both. Use the Flow Chart below to know when a student needs to fill out one or both forms. There are instructions at the bottom of the Student Travel Authorization form if needed.

Fill out the student travel auth as completely as possible. GET THE STUDENT’S NET ID, BIRTHDAY and FULL NAME. Karen will need this to book a flight. You may also need to get a credit card number from the student. The hotel cannot be pre-paid by BYU, so the student may have to have the money to pay the hotel and then be reimbursed. If you use the department card to pay for the hotel, you have to have the person on the card sign credit card authorization form from the hotel. They will have to fax an ID and the card along with the form to the hotel. This gets messy, so it is preferable to just have the student pay when they check in. You will need the student’s CC info to reserve the hotel, but they won’t be charged until they check in in most cases. If Dr. Wirthlin is traveling, use his AMEX to book the hotel. The AMEX card details are on a sticky note in the drawer under the keyboard.

Email the form to the Department and/or Dean for their signature.

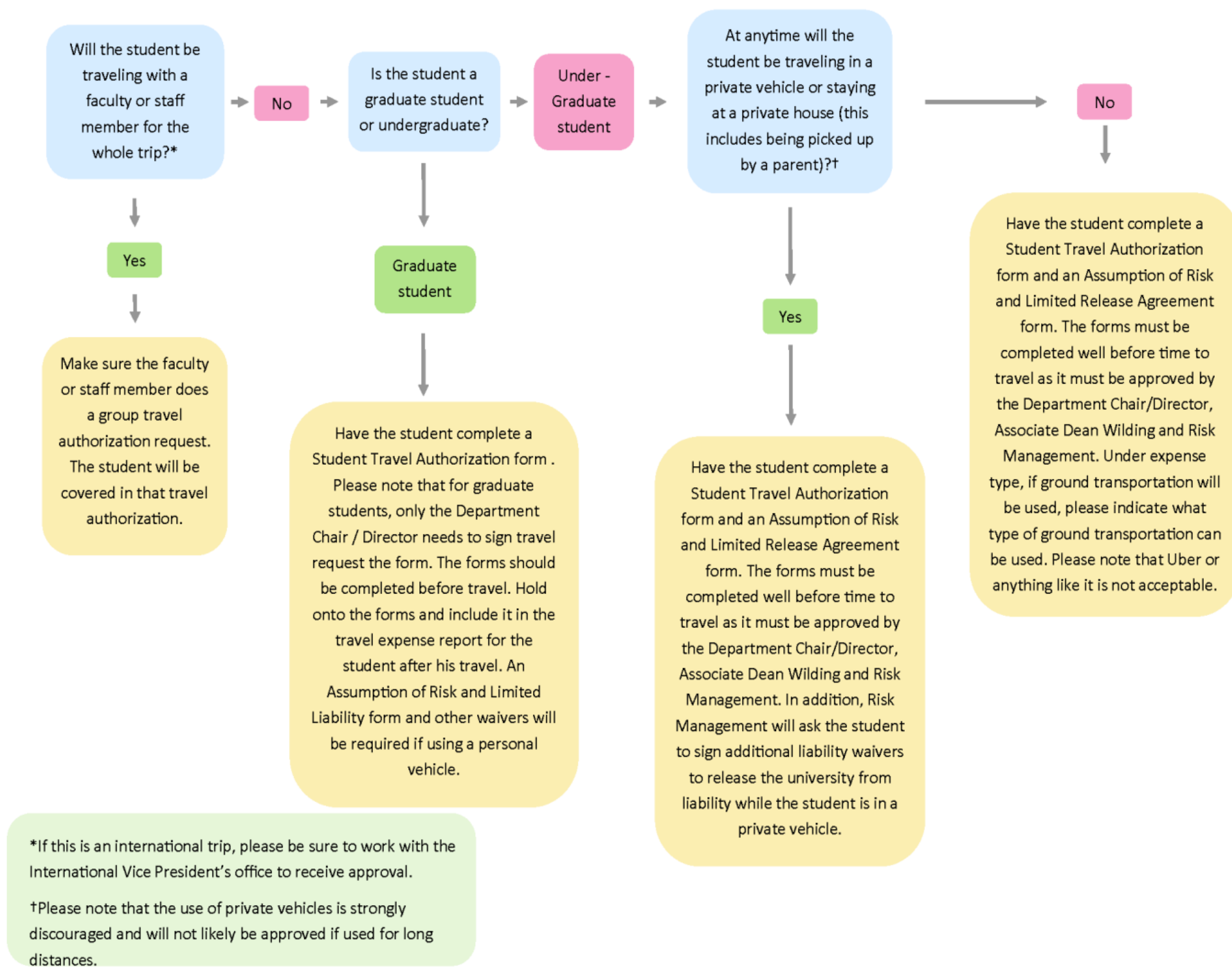
Once the TA is approved (signed), call or email Karen at BYU travel and arrange the flights, etc. for the trip. Tell her we don’t have a TA number because it is a lone student traveling without a professor and account number we want charged (and thus the professor doesn’t need airfare, hotel, etc).

Keep the student authorization forms until the trip has ended and file them with the receipts for reimbursements you will receive for the trip. You will submit all receipts and the student TA when you submit the expense report after the trip.

TA for Group Travel with multiple professors/BYU Employees:

If multiples BYU employees are traveling together with or without students, just create one Travel Authorization in Y-Expense. Proxy under the professor who is in charge of the trip. When asked what travel type it is, select “group” travel. When you get to Step 2, click on “Share this travel authorization.” This will bring up a pop-up screen for you to select the BYU employees you want to add.

Student Travel Procedures



Expense Reports in Y-Expense:

Once someone has returned from his or her trip, you will have to fill out a travel expense report. Here are the things you will need to do for that:

When doing expense reports it will ask you for the account number, account code, and the account class. For the account code (the 4-digit one), there are some department numbers that are good to know:

- Faculty travel:
  - Domestic: 7000 Foreign: 7050
- Student travel:
  - Domestic: 7030 Foreign: 7080

- Membership fees: 6192
- Supplies: 6100, 6109
- Mail: 6130
- Food/hosting: 6180
- Benefits Faculty: 5920
- Benefits Students: 5960
- Facilities and Administration: 8990, 8991
- Tuition: 6319
- Wages: 5220, 5260, 5570, 5600, 5672
- Printing and Copying: 6120

*If there is more than one account code listed for a specific type of expense, just pick one.

For the account class codes, there are different classes for different professors; ask the part-time secretaries to print out a sheet for you with all of the different classes for each professor. You will need the professor's classes before you can do an expense report for any student.

- Go into Y-Expense, click on "Start Expense Report," then click on "Travel Expense Report." You can also go to the TA for the trip on the left side of the home page and click on "New" to start a travel expense report.

- Get all of the receipts from the person(s) that went on the trip
- Ask the professor what card they used to make their purchases (was it a BYU card or a personal card)
    - To make sure that you are clear on which card they used, ask them if they need to be reimbursed. They will only need reimbursement if it was a personal card.
    - **If they used a BYU card,** you will go to the left side of the Y-Expense homepage, look at the BYU card transactions, and select the transactions one that you want

to insert into the expense report. It can take up to a week from the end of the trip for the charges to show up under BYU transactions.

  - **If they used a personal card,** you will need to manually enter in the transactions in the expense report when prompted to do so.
- Ask if they need a per diem.
  - If yes, ask them specifically for how many breakfasts, lunches, dinners and incidentals (snacks, tips, etc. One incidental allowed per day).
  - Per diem should calculate automatically in the system. Y-Expense also has a link to help you manually calculate the per diem depending on where they had travelled. It is on the Homepage of Y-Expense on the right-hand side.
  - If they want to use non-per diem, get the actual receipts the professor/student used on meals and incidentals and manually enter them into the expense report.
- Ask the person if they drove their own car to the airport
  - *Helpful hint* If you are reimbursing for driving to and from the airport, it is 100 miles round trip from BYU to the Salt Lake City Airport. Under the Y-Expense Per Diem link it will also calculate how much is owed for mileage. Use the "standard" mileage reimbursement from the drop down menu. This accounts for wear and tear on a personal vehicle as well as the gas.
- <u>If the person has lost or was not given a receipt</u>, have them complete the "Lost or Missing Receipt" form listed on the right-hand side of the Y-Expense Homepage. Mark Ormsby has to sign it. Submit this with your report in place of the receipt.
- ***If expense report is for student traveling without faculty, see note below
- If the trip was an international one, you must include the exchange rate and the cost in US dollars for the specified day the purchase was made. You will have to look up past

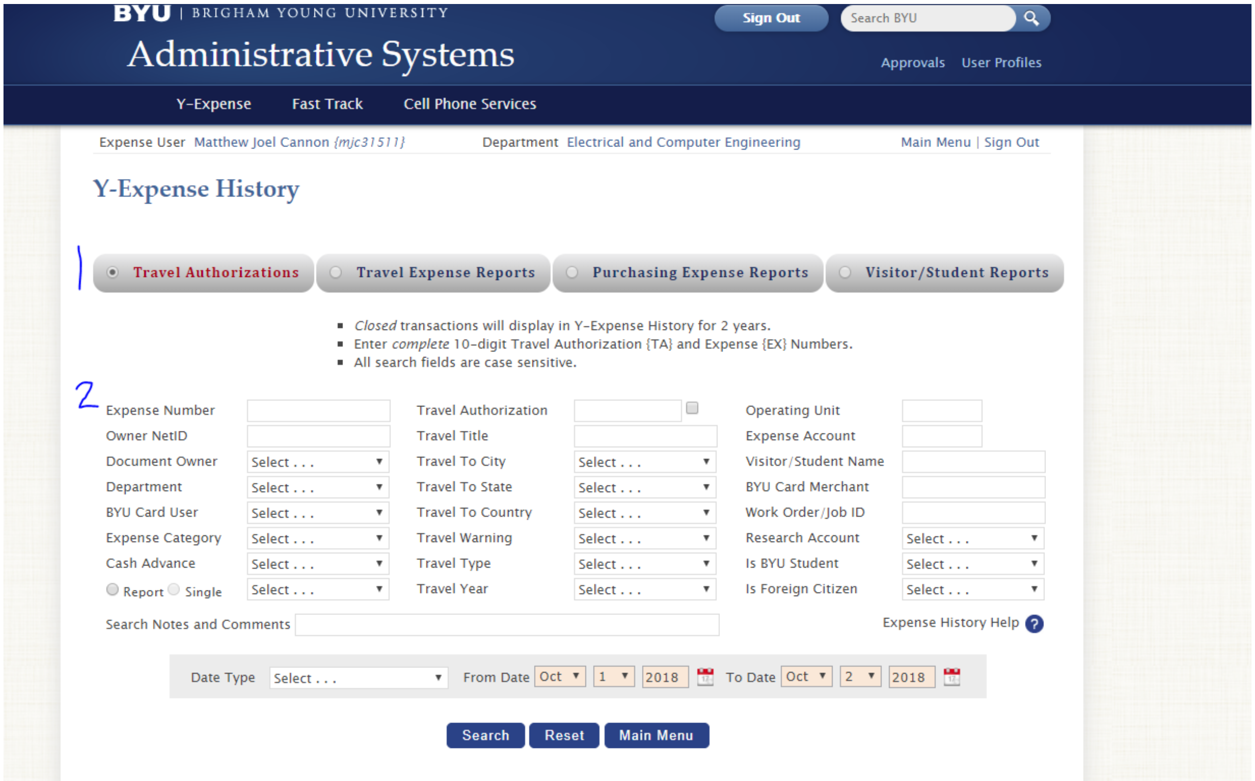
exchange rates to do this. It is sometimes helpful to create and submit an excel spreadsheet with the conversions along with the receipts.

- Input the receipts that you were given in Y-Expense under the specified professor
- Scan receipts
- *Go to the J-Drive*
    - *Assistant Controller folder*
    - *Folder for specific professor*
    - *Whatever folder under the specific professor that makes sense (usually the folders will be by year)*
- Once the receipts are saved to the J-Drive, attach and save the receipts to Y-Expense as well
- Print the Expense Report from Y-Expense
- Staple the receipts to the printed out Y-Expense form
- Get a White flag/tab from the copy room and write on it:
    - Professor/student name
    - Place that was travelled to
    - Dates of the trip
    - TA# (It will be on the expense report, unless student traveled alone)
    - Expense Report # (This will also be on the expense report)
- Attach the white flag to the expense report
- Put the expense report with the receipts stapled to it in the filing cabinet (second drawer in the cabinet directly behind the student secretaries)

*****Note:** To start a travel expense report for a student that is not accompanying a professor, go to Y-Expense, don't proxy for anyone; do it under your own name. This will make sure you are emailed when the report is approved. Click the "Start Expense Report," then click "Visitor or Student Expense Report" and go through the screens and fill out the information. Upload the forms mentioned earlier and the receipts with this expense report.

After all Expense reports have been approved for a trip with associated TA:

To view past TAs and Expense Reports in Y-Expense, go to the home page of Y-Expense and click on "Y-Expense History." Select what type of record you are looking for, then put in one or 2 parameters. The system is sensitive in excluding possible records.



To reimburse someone for personally buying something for the Department:

Go into Y-Expense, click on “Start Expense Report,” then click on “Reimbursement to Employee” or “Student/Visitor expense report.”

Lab Meeting:

Each week the SHREC group will have a lab meeting (during fall and winter semesters). The donut order is for this lab meeting. You will be expected to attend this meeting each week and give any administrative updates that you have (usually I don’t have any). This is also the time where professors will often ask you to do things, so I like to bring a notepad to make sure that I remember all of their requests. The lab meeting will mostly be technical presentations on what each research group in the lab is working on and what the other SHREC sites are working on.

You will need to take roll at the lab meeting. The roll you take will not be formal and you will not be passing around a roll sheet. Instead, you will be observing who is there during the lab meeting and taking roll yourself. It is helpful to study the pictures on the student’s CCL wiki pages so that you can recognize faces. You should also check the donut sheet to see if there are any other names on the list that you may have forgotten or not known.

At the end of the semester there is a lab party with Pizza, games and family members invited. Here are the instructions on how to prepare and conduct the party/meeting. **IMPORTANT: When making a flyer to advertise for the party, do not call it a "Party," call it a "meeting."**

https://ccl.ee.byu.edu/wiki/admin/how_to_administrative/end_of_semester_party_instructions

Donut Order:

This may change. Dr. Wirthlin and I talked about cutting costs by not ordering treats for the lab meeting as often.

Each week for the SHREC lab meeting, an order of donuts will come in. It is your job to set up the donut order for the lab meeting each week (I do this on Mondays). Talk to Professor Wirthlin to find out if he wants to pay for the donuts weekly or if he wants to pay for them all at the beginning of each semester. I liked ordering them weekly because then I was able to switch up how many donuts or bagels we ordered each week. Usually, the order is 3 dozen donuts/bagels. I liked to switch off every other week and order 2 dozen donuts and 1 dozen bagels one week and to order 1 dozen donuts and 2 dozen bagels the next week. I always ordered 1 package of cream cheese per bagel. Cougar Café also tended to overcharge us if you did a recurring order at the beginning of the semester. Their number is 422-4134.

When you make the order, have the donuts delivered to the front desk about a half hour before the lab meeting. Go to the break room and grab enough knives and napkins for everyone and then take the donuts and bring them to your office until about 5 minutes before the meeting.

5 minutes before the meeting go into the room where the lab is meeting (most likely 460) and set up the donuts on the table by the door. The food sheet that you need to bring every week (and bring to any event where food is ordered and there could be fewer than 13 people) is under Admin Files>CCL Info>Food Form. Because there are possibly fewer than 13 people taking donuts, the university needs to know the names of everyone eating the donuts. Take the donut list and a pen to the meeting so everyone who takes a donut can sign the sheet. You will also need to put the date, your name, and what account the donut purchase is being purchased on.

After the lab meeting, complete a receipt information form and attach the receipt and the donut form to it, then put it in the financial's In-Box in the main office.

Weekly Reports:

The weekly reports log is kept in an excel document in the CCL folder. Check the reports for the previous week around Wednesday of the next week.

Things you need to do in the Document each week:

- Add the weekly dates at the top of the new column for last week's weekly report
- Click on the link in each person's row or just open the wiki and go down the list.
- If the person has completed their weekly report, then put a 1 next to their name
- If the person has not completed their weekly report, then put an 0 next to their name
- If the person has caught up on their weekly reports and has finished past weekly reports that were previously not completed, replace the 0 with a 1 and highlight the cell in yellow to indicate that the report was late (optional to highlight)/
- By using 1 and 0 instead of Y and N, you can have excel easily add up how many reports are missing and how many reports have been completed.
- Save the document when you are done
- Once you are done checking the reports, look through the spreadsheet for anyone who did not submit a weekly report that week.
- If you have students that have not completed weekly reports for the last 2 weeks, then email them reminding them that they need to fill out their weekly reports.

Employee Time Approval:

You will be the time supervisor for all of the students working for the SHREC Center who are working under Professors Goeders, Hutchings, Nelson, and Wirthlin. You will not only be in charge of approving their time, but you will also be in charge of keeping track of each student's time for each pay period and for the semester as a whole. Here is the procedure that you should follow each pay period:

- Each semester you should create a tab in the SHREC Student Hours excel sheet. In this sheet you should create a report for the SHREC professors that shows how much time each student works per time period, how much time each student works per semester, and what the weekly average of hours worked is for each student. Copy and paste the report from the previous semester, update the names and clear the contents.
- You will get an email after each pay period has been completed from student employment. This email will contain a link that you will click on that will lead you to the employee time approval page.
- Open up your excel sheet to track the student hours
- Go down the list of the employee hours from the employee pay period link and record them in your excel sheet. Double checking your numbers doesn't hurt ☺

- Most of the formulas work without you having to re-input any information into the formulas. The only formula that works differently is the formula for the “Average per Week” column. If you look at this formula it will say something to the effect of =SUM(C2:K2)/3/2 you will need to change one number in this formula for each student. In the example above, =SUM(C2:K2)/3/2 you will need to change the first number that the sum is being divided by, in this case the 3. The 3 represents the number of pay periods that you are dividing by. This number will go up by one for each pay period that you enter into the excel sheet. All of the other formulas should work fine without needing any adjustments.
- Once you have finished inputting, double-checking, and editing formulas, approve all of the student’s hours and close the link to the pay period approval page.
- Next, prepare an email to Professors Goeders, Hutchings, Nelson, and Wirhtlin. In this email, attach your updated excel sheet and make the professors aware of any anomalies in the student’s work hours that they should be aware of. Once you have sent the email you are done with the employee time approval process.

Flyers/Advertisements

Dr. Wirthlin may ask you to make a flyer or advertisement for something. Once he has approved the design, print color copies to the printer in the copy/supplies room and give these to the student secretaries. They will put a date on the flyer and will hang the flyers where you want them (like the Clyde and the Engineering Buildings). Flyers do not need to have department, college or BYU logos on them. If the flyer is a job-recruiting tool, it is advisable to put the flyer or the job information on Handshake (Employment Recruiting App/website).

Accounts:

- CHREC Accounts
    - Industrial-C (R0602229)
        - From industrial sponsors of our old center (CHREC) disbanded 2017
        - Subject to 10% F&A
        - Account does not go away
        - Most flexible account
        - Needs to be renewed with Kristi Chase every year (she will email)
        - Spend on this account LAST since we can never get more money in this account

- SHREC Accounts

- MIPR-S (R0112389)
    - Govt. associated account
    - Funded by Air Force Research Labs like AFRL Wright-Patterson and Kirkland
    - Spend out first
    - No International Travel
- NSF-S (R0112363)
    - Govt. associated account
    - $150,000 year - we received $450,000 lump sum in Sept. 2017 for 3 years of funding
    - Pay for administrative stuff (travel to workshops, hosting our workshop, etc.)
    - Your salary will be on this account
    - Subject to 50% F&A
    - Can pay tuition on this account because tuition is not F&A taxable
    - Spend $150,000 a year (From September 1 to August 31 of the next year)
    - Spend out before Industrial

- Sandia-S (R0302751)
    - Govt. associated account
    - Subject to 10% F&A
    - Goes away in 5 years (9/2022)
    - Want to spend this out before other industrial accounts
    - No international travel
    - Spend out Spend out after MIPR

- LANL-S (R0302771)
    - Govt. associated account
    - From Los Alamos National Lab
    - Subject to 10% F&A
    - Need to be a bit careful (government)
    - No international travel
    - Spend out before Industrial

- Industrial-S (R0602555)
    - From industrial sponsors
    - Subject to 10% F&A
    - Does not go away
    - Most flexible account
    - Spend it out so that we don’t get money withheld by NSF

    - REU-S R0112378
        - Govt. associated account
        - Supplement to our main NSF award
        - Spend only on Undergraduate Students
        - No F&A

    - RET-S R0112379
        - Govt. associated account
        - Supplement to our main NSF award
        - Can only be used for the high school teachers and their purchases
        - No F&A

- Other Accounts
    - Dr. Wirthlin’s personal research account (aka Consolidated account)
        - Account number 20243111
        - Included in the Monthly accounting spreadsheets
        - No F&A
    - Watson Fund, account number 23243089 is the old Watson fund, 31243124 is the new account number.
        - This is NOT a SHREC account, it is a department account, but you may come across it now and again. Include both in monthly budget reports.
        - In Quarter 1 and 3 the new account gets around $30,000 deposited into it. Money SHREC can use may be transferred from the new account into the old account so we can keep track of our specific expenditures. Decision to do this is still pending.
        - We have access to look at the old and new account in the Bob system. If you need to access it, go to MyBYU>Financial Services>Business Objects>Financial Systems Information>University Financial Reports>Non-Project Budget Expense and fill in fiscal periods and operating number (account number listed above)
    - Graduate Fund, account number 11243052
        - This is NOT a SHREC account, but you may come across it now and again. We don’t pull reports or do anything with this account normally, but sometimes we charge graduate student expenses to it if we have specific permission from Dr. Wirthlin. Dr. Karl Warnick manages the account.

Accounting Notes:

- F&A is like a tax the university charges for using the money in the accounts. Most accounts have 10% F&A.
- F&A is not charged on tuition
- The same student's wages, travel and tuition should be on the same account.
- If a student is not taking classes, we have to pay student benefits (about 3.5% of the student's monthly wages)

Monthly Account Work:

I have an entire document tutorial that explains how to do the monthly budget report and the monthly estimates. Here is where it is found: Admin Files>#7>SHREC admin assit.>Budget spreadsheet tutorial

Here is some other helpful information about the accounting:

- Mark Ormsby and Professor Wirthlin will be the most helpful if you have questions about the accounts. If one person cannot answer your question, then usually the other person can. Talk to Dr. Wirthlin first. Mark is hard to get a hold of.
- When trying to come up with a monthly estimate for each month on how many hours students are going to work and therefore how much each student is going to cost, keep in mind that in *December (and April for students leaving for sp/su) students usually work about half as much* as every other month because of finals and holidays.
- When you are deciding what charges to put on either the B1 project or B2 project know that *these people are on B1* and everyone else is on B2 unless Professor Wirthlin tells you otherwise:
    - Professor Hutchings
    - Professor Nelson
    - Half of Dr. Goeder's expenses
    - Eli Cahill
    - Tanner Gaskin
    - Half of Dallon Glick's expenses
    - Adam Hastings
    - Harrison McCullough
    - Jesse Grigg
    - Hayden Cook
    - Clark Green
    - Wesley Stirk

- If you see a supply purchase on the account overview that you have not put on your estimates sheet when the order was placed, then you need to track down that purchase. You can do this by clicking the YExpense link that will be in the View Detail box from the spreadsheet that you export into Excel from the BOB system. If you still don't know what the expense is for, ask Dr. Wirthlin and he will likely have you put in a request with Mark through the ticketing system.

- If the original estimates that you made for the year seem off, then look at the how much each student has really worked per week and see if you can make a better estimate that will make your prospective budget more accurate.

There are several reports besides this one you will update each month. The monthly reports include:

- Monthly accounting document (colorful Excel spreadsheet) Send to Dr. Wirthlin
- Estimate accounts (Google Spreadsheets, update the "Actual" costs when numbers come in each month)
- B1 Project Costs 2019 Send to Dr. Hutchings
- MS Wages Tuition and hours totals
- NASA Cost sharing
- SHREC and CHREC Percentages 2019
- Project Costs 2019 Send to Dr. Wirthlin
- Keeping Track of Yearly Income Send to Dr. Wirthlin
- Update CHREC Wiki if member payments came through that month (under Members section)

Each Semester, you will update these reports:

- Wage and Tuition Reports for Mark (accounts for students for new semester, wage rate, contract amounts for Phd Students); submit through ticket system one category at a time.
- History of Wage Rates
- Make sure Master list of Student Information is up-to-date
- End of Semester Report
- Cleaning Checks for students leaving lab
- Lab Party (only in semesters where they do lab; call it final lab "meeting")
- Manage/Clean up Wiki pages (Move student pages for students leaving), update the students list, update the seating chart and computers (if computers moved)

Semi-Annually, you will update these reports:

- SHREC conferences take place semi-annually. Every 18 months or so, we host the conference at BYU. Coordination usually begins 3+ months prior to the conference.
  January and June:
    - L.I.F.E. Forms
    - Any other duties the hosting university asks
    - Poster Printing
    - If we host, look at the Admin Booklet for duties.
    - Email posters the students make to Herman/Alan and have students put posters on wiki

Annually you will update these reports:

Summer

- SHREC Partners Report (Nicole from Pittsburgh University will send you the sheet to fill out and return. Look at last year's example.) Usually due in July or August.
- SHREC Annual Report on NSF website (you will probably compile data throughout year). Due end of August. You will work with Dr. Wirthlin on this.
- Immerse. Aaron Hawkins will contact you about this. You will also do extensive work in **February** to hire candidates for Immerse.

Various Times of Year

- Grant Supplement Requests like REU, INTERN, RET, etc. (Dr. Wirthlin will ask you to submit them through Fastlane)
- Spreadsheets Dr. Wirthlin and others would like you to compile (lots of these)

Descriptions of some Reports to Update:

Wage and Tuition Sheet: At the end of every semester, you will need to work with Dr. Wirthlin to complete the wage and tuition spreadsheet for Mark. This spreadsheet will include all students that are paid for by SHREC funding and you will have to decide what accounts they are paid on each month and what their rate of pay will be (sometimes they will receive a raise, usually in spring and fall; see policy document). For the graduate students, you will need to decide who will get tuition covered for the upcoming semester (and how much tuition will be covered based on their hours in lab). PHD students will usually receive tuition. Tuition MUST be charged on the same account that the student is getting paid from. You will start a financial ticket on the ECEN ticket system for each of the items above (one ticket/spreadsheet for students moving accounts, one for students changing their rate of pay, one for tuition for grad students). NOTE: Start working on this a month or so before a new semester starts. Dr. Wirthlin will consult with you on it, but you should bring it up in one of your weekly meetings.

Master Student Hours, Wages, and Tuition Spreadsheet: It is decided if Master's student get tuition or not based on how many hours that they have worked in the lab. The formula for calculating how much tuition each student has covered by SHREC is listed in the MS wage, tuition and hours spreadsheet. It can also be figured out by filling out this chart:

Calculating Tuition Payment	
Hours left to use	
How much tuition coverage earned: Hrs left to use * (cost of 2 full-time semesters/1100 hours possible to work per year FWSS)	
No. of Credits student is taking for term or semester	

Class Titles (only EcEn classes or approved other classes)	
Cost of Tuition (# of credits * cost per credit if not above 8.5 credits)	
How much they want covered by their tuition funds earned (email and ask)	
How many hours they used: how much tuition they want covered/(cost of 2 full time semesters/1100 hours per year)	

2019 SHREC and CHREC Percentages Spreadsheet: This spreadsheet will summarize how all of the accounts were spent out throughout the year. Each month you will deposit the transactions in the document. At the end of the year, sort each tab in the document by account code (type of expense). Then complete the calculations at the top right of each tab to show how money was spent during the year.

Project Costs Spreadsheets: Update this report monthly as well. Make sure to include tuition, travel and supplies as well as wages. Follow the format already established in the spreadsheet. Once the main project costs spreadsheet is complete, copy and paste the data from the B1 tab into the document "B1 Project Costs". Update all formulas on the main page of the document and send to Dr. Hutchings.

NASA Cost Sharing Spreadsheets: Dr. Wirthlin will probably ask you to keep track of Matthew Cannon's and Andrew Keller's costs for the year in case he needs to report these to any government agencies. The document is in the Admin Files>Accounting>SHREC Accounts>Other Spreadsheets file. I always updated this after finishing the monthly and estimate spreadsheets each month. Try not to put Matthew and Andrew on a government associated account. We need to show that we paid at least as much for them from non-government accounts (like the S-Industrial account) as the amount NASA (a government entity) gave them in grant money, which is $8,000 annually.

*End of Semester Report***:** At the end of each semester, you will need to create a report for the professors about the students that you are keeping track of for pay period hours, lab attendance, and weekly reports. The end of semester report should have a column for the student's name, a column for which professor is their advisor, a column for their average hours worked each week for the semester, a column for how many weekly reports that they missed for the semester, and a column that reports how many lab meetings that they missed throughout the semester. This report will help the professor to decide which students to keep on, who to give raises to in future, and which students to let go from the lab.

Hosting SHREC Conferences:

For SHREC Conferences held in Provo you will be in charge of all of the arrangements. You will need to get a venue for the conference, coordinate food (2 breakfasts, 2 lunches, 1 dinner, and snacks), find a venue for the fancy dinner, organize scheduling, etc. When you send out registration there will be a website page made for your conference. On that page, there will be different sections. The top section will have the link to register and then there will be sections for the SHREC Annual/Midyear Workshop location, SHREC Annual/Midyear Workshop hotels, SHREC Annual/Midyear Workshop dinner, Airports and directions to the hotel, Taxi Services, and Directions from the hotel to the workshop site. Make sure to set a budget for the Workshop with Professor Wirthlin at the beginning of your planning so that you both feel comfortable with the amount of money being spent.

**NOTE: use the Excel spreadsheet checklist in Admin Files>Grant Info>SHREC Workshops>SMW 18 at BYU>Task Lists>SMW18TaskList2018

Directions: I used Google Maps to get all of the directions for the Workshop. It is the most reliable source that I have found for directions.

Taxi and Shuttle Services: I also used Google to find the taxi services in Provo.

BYU-Specific Hosting Issues: If you are hosting the SHREC Workshop on-campus, make sure to politely and professionally make participants aware that they cannot smoke on campus.

If you are hosting the SHREC Workshop on campus make sure to find out if the dean that is over the building you are using allows coffee to be served in that building or not. There is not a campus-wide ban of coffee being served on campus and the dean of each building gets to decide if they are comfortable with coffee being served in their building or not. The conference center does not allow coffee to be served in the building. All buildings allow people to bring coffee into their buildings.

BYU Catering: If the SHREC Workshop is on campus, then BYU catering may be required in the building you are using. BYU Catering is a moderately priced option with decent food, which makes it a good option for most meals. Look through BYU Catering's and BYU Food To-Go's menus so that you know what options you have available to you to choose from. BYU Catering is nice because they will present the food more formally than BYU Food To-Go. The last lunch of the workshop is usually a box lunch so that participants can grab their food and go catch their flights. BYU Food To-Go is a good option for box lunches because they have sandwich and salad box lunch options. BYU Catering is a nice option for snacks and breakfasts because they will be presented more professionally and the menus are already priced out per person. For the first lunch, the workshop participants prefer to have a hot lunch option. This is a good meal to use BYU approved off campus catering for. Depending on where you hold the dinner will depend on who you use to cater it. If you are holding the dinner on campus, then BYU catering is a good option. BYU Catering has buffet options that allow you to have options for everyone no matter what their dietary restrictions are.

*__Hotel Blocks__***:** Talk to Dr. Wirthlin and figure out what hotel you would like to offer block rooms at for the workshop. Most likely, you will be using the Provo Marriott on Center Street. Call Karen in BYU Travel to help you set up the contract with the Provo Marriott. She will know what contract prices the Marriott is supposed to give BYU groups and will make sure that the Provo Marriott follows through with getting the paperwork to you. Dr. Wirthlin will have to approve and sign the contract when it comes.

When we were trying to figure out how many rooms to book, we asked how many rooms other universities had previously held for participants under block room rates. These numbers were quite high. The questions that we should have been asking were how many rooms were used under the block rate. These numbers were in the low thirties. If you have to book a hotel that will make you pay for the unused rooms, set the amount for them to hold around 35. We did not and it caused issues.

*__Website__***:** Limor at UF will do the website for you. You will need to start sending her information about the venues, hotels, airports, etc. in January if you are hosting the June midyear workshop. She will code the information into the website using html or wordpress.

*__Registration__***:** Nicole from Pitt will be in charge of registration. Once the registration link goes out, she will send you the registration list once a week. The week before the conference Nicole will send out the registration list once a day to you so that you can see how many more people you need to add to you participant count.

__Printing:__ If you are hosting the workshop, then you will need to get the workshop printing done. This includes all printouts for folders, the workshop proceedings books, and any other miscellaneous printing needs. If you are hosting the midyear workshop, then all folders have the agenda, attendee list, the poster and demo list. If you are hosting the annual workshop, all folders will have the above-mentioned items and the member folders will ballots for them to vote on projects at the conference. Other items you can include are maps/directions, list of things to do in Utah, and any other location-specific information.

*__Budgeting__***:** Make sure to budget all of your items so that you know what the expected cost for the conference is. It will be especially important to budget food because of how much food costs can vary.

*__Booking venues__***:** Depending on where you want to hold the SHREC Workshop will depend on how far in advance you will need to book the venue. For instance, if you want to hold the workshop in the Wilkinson Center Ballroom, then you will need to book the Ballroom about 18 months in advance. If, however, you want to book the workshop at the Hinckley Center or Conference Center, then you can only book those as early as 4 months in advance. A good rule of thumb is to call the venue right when you decide that you want to host the workshop there. Even if you cannot book the venue at that time, they will still have the ability to tell you if they are usually booked at that time and how busy they usually are during that month.

*SHREC Giveaway***:** At every SHREC Workshop, SHREC participants receive a gift as a part of their registration. It will be your job to talk to Dr. Wirthlin about what the budget is for the SHREC giveaway and then look online to find a place that has products that you can customize with the SHREC logo that is in your price range. I used Amazon to buy our product. Dr. Wirthlin had me compile a list of items that were a range of prices that looked like they could be interesting as a gift. I looked at things like water bottles, 3D puzzles, speakers, usb flash drives, charging ports, mobile chargers, etc. We then showed the proposed items to students and professors in the lab meeting and received feedback on what sort of items that they were interested in. I then went and looked for items similar to what they had suggested and created a new list. I had Dr. Wirthlin look at the new list, ok it, and then I created a Google survey where I listed the price for the item and the picture and I had everyone vote on his or her top two items. After the majority of students answered the survey, I deleted the items that were unpopular from consideration. I then sent out another survey with the top 5 options and told everyone to vote for one item. The winning item was our gift for the workshop. We bought our gift from Amazon and we bought clear 1" x 2 5/8" laser printer Avery labels to put on the gift and white 2" x 4" laser printer Avery shipping label to put the SHREC logo on the boxes that the gift came in. Avery's website allows you to create label designs from their website to print for each specific template, so I used their site instead of Microsoft Publisher to create the labels. Ask the student secretaries how to print labels from the color printer in the office.

Electrical: You will need over 50 outlets for the SHREC Workshop. Contact the Electrical Shop and fill out a work order with them to get the outlets and other electrical cords put in place for the conference.

*Campus Scheduling***:** If you get anything from campus scheduling (like easels) be aware that they do not deliver until 9 or 10 in the morning, so if you want something before that, then it will be delivered at 4 PM the day before.

SHREC Conference Tasks:

There are tasks that need to be completed in order to get everything done for the Workshop. All of the tasks that are not geographically restrained (like catering, venues, etc.), will be split up between the schools in SHREC to help lighten the burden of hosting for the host school. Because of this, different university's personnel will become skilled in completing different parts of the workshop prep tasks.

L.I.F.E Forms:

One of the tasks that BYU has taken on is creating the IUCRC L.I.F.E Forms for each workshop and attaching the proper survey that the NSF Coordinator (aka Evaluator) needs the members to fill out. The current Evaluator is Vida Scarpello. Here are some step-by-step instructions to create L.I.F.E. Forms. Incase these directions are too vague, follow the PowerPoint guide in Admin Files>#7> SHREC Admin Asst.>LIFE Forms Tutorial 2017.

1. Go to https://iucrclife.chass.ncsu.edu/lifeforms/
2. Next, click on “Admin Register” that is located at the top right part of the page
3. Fill in the boxes for username (your email address), password, and verify password
4. You now have an Admin login. Go back to the first page that you visited for the IUCRC and now click on “Admin Login” on the top right side of the page.
5. Fill in the boxes with your username and password.
6. You should now be on a new page. On this page click the button on the left side of the page that says “+ Add Meeting”
7. On this page fill out the date, the name of the center (SHREC’s name is too long, so call it the “NSF SHREC Center”), what university it is being held at, and the password to access the L.I.F.E. Form. This password is usually the same password as the C/SHREC website’s password for the members-only section.
8. Once you have filled out the boxes you will have to choose what options you want for your L.I.F.E. Forms. I would always activate the “Add boxes for comments, questions, and suggestions on the evaluation page,” “Add boxes for PI's to respond to comments,” and “Use project phase specific response categories for new proposals vs. project updates. New proposal response categories reflect level of interest, and project update response categories reflect assessment of progress”
9. There will be a bunch of survey options below these boxes and you will have to talk to the NSF Coordinator (currently Vida Scarpello) and ask him/her what surveys he/she needs attached to the L.I.F.E. Forms. Last conference they had us select the “Pulse Member” survey and the “Center Years 1-5”. Those are both buttons you click on on this page.
10. Once you have chosen the settings that you want click add and it will create the meeting. If you need to, you can edit the settings at any time by clicking the “Edit” button next to the meeting name on your admin login page.
11. Once the meeting has been created, click on the “View” button next to the meeting name. This will pull up a new screen.
12. On this screen, you will have the ability to add projects to the L.I.F.E Form for members to give feedback on.
13. You will need to gather information from all the universities about what projects they are presenting on that need a L.I.F.E. Form. You will need to ask for:
    a. Project name
    b. P.I. (professor in charge of the project)
    c. What order the projects are being presented in.
    d. Is it a new proposal or a project update
14. When you fill in the information for each project there will be boxes for
    a. Project Title

b. PI
c. University
d. Admin-Specified ID (can be used for ordering)
    i. This is the box where I would fill in the number of when the project is being presented. If the project were being presented fourth, then I would put a 4 in this box. If you do not numerically order your projects, then they will automatically order themselves in alphabetical order.
e. Project phase
f. NOTE: If this conference is the MIDYEAR Workshop, you will just have projects that have started that year. If the conference is the ANNUAL workshop, you will have the upcoming projects for the next year. Dr. George will send the new project names. He will ask faculty from all sites for input and then should send you a list of the new project names. The members, etc. only vote on one set of projects (either ones that have started earlier in the year or those proposed for the upcoming year).

15. Once you have entered the projects and “attached” (clicked the button for) the survey for the NSF Coordinator, then you are finished. You can get PDF versions of the L.I.F.E. Form and surveys by clicking the “View” button for the conference. PDF version buttons will be near the top of the page. Send the PDF to the coordinator of whatever university is hosting the conference.
16. This last conference (SAW18) Vida wanted us to print out the “Faculty” surveys instead of allowing online access to the faculty. All you have to do with that is sign out of admin and go to the main page of the Life forms (https://iucrclife.chass.ncsu.edu/lifeforms/index.php) click on the survey you set up in the list of surveys available to take on the website, enter the password you set up for the survey, and then click “faculty.” At the bottom of the next page you will see a link for “Faculty Process/Outcome Questionnaire.” Click this, save it as a PDF, and email it to whoever is the coordinator hosting the conference. They will need to print enough copies for all the faculty members attending the conference. Don’t complete the survey, just exit out of it.

Posters:

Another job that you will be in charge of for the SHREC Conferences is printing posters. You will have to coordinate with Professor Wirthlin on when you will get the posters printed. Here are the steps to printing the posters:

1. A week or two before you are ready to print the posters go to the EE Shop and ask Joe if there is enough glossy paper and ink to print 6-8 four-foot long posters. If there is not, then ask him to order more ink and paper.

2. Make sure that the students know the date that their posters are due. The students should post their poster on the CHREC wiki under the correct year and project number in both PDF and Power Point.
3. The easiest way to print the posters is to get a flash-drive and then download all of the PDF versions of the posters onto the flash-drive.
4. Once you have the pdf versions of the posters on a flash-drive, go back to the EE Shop and plug the flash drive into the poster printer.
5. Next, choose a poster to print and then hit settings. Change the quality of the print to "best" and then hit print.
6. Repeat step 5 for the rest of the posters
7. Each poster will take about 15 minutes to print.
8. Once the posters are printed, get the neon green poster holder out of the lab closet and put all of the posters in it. NOTE: This poster holder opens on both ends. Make sure to tape one end shut before putting posters in the holder and tape the other end closed after putting the posters inside. You don't want posters falling out as you are walking through the airport! The poster holder can just be carried onto a flight and put under your seat. I did this for the past conference in Pittsburgh and no one stopped me.

If the plotter in the shop is down, try the plotter in 425 CB. Submit through the CADEM online system. https://caedm.et.byu.edu/wiki/index.php/Plotting If that plotter is out, use Cougar Creations. Take a flash drive over to the Wilk and print them on the spot. Do not try to email the job to them because they will say it will take 3-4 days to get the job done. It is preferable to get the posters printed in the shop or in 425 CB because they cost about $18 a poster there. Cougar Creations costs about $42 a poster.

Grant Writing and Compiling:

One of the things that you will do in this position is help Dr. Wirthlin with all of the grants and reports for NSF.

https://identity.research.gov/sso/UI/Login?module=nsf&env=prvw&app=portal

This is website where you will create, edit and submit most grant proposals and updates. Once you log in (see "Passwords" section for Dr. Wirthlin's credentials), you will use the menus to find the reports you will work on.

Annual Report:

For this report, you will log in to the website above, then click on "Awards & Reporting," then "Project Reports." If you go to the "All Awards" tab, you will see all the "umbrella" grants we have received. The one we are currently working in is the one with the award date of 9/1/2017.

If you click on the award number for our current award, you can view past and upcoming reports we have/will submit. The due date of the reports will be posted.

Ideally, you will collect information slowly throughout the year for the annual report due in August. Once you have gathered all of the information that you have access to (student participants, products from the IAB emails of BYU faculty), ask professor Wirthlin to help you get the rest of the information.

Some of the information you will be able to figure out on our own includes the following:

- Students who worked for SHREC this year and their email addresses
- Calculate the amount of person-months worked during the reporting period. A person-month is equivalent to 160 hours worked. I found that the easiest way to calculate the amount of person-months worked by someone was to go to the Student Hours spreadsheet and add up all of the hours for each reporting period.
- Papers, theses, dissertations, publications, papers presented at conferences, etc. have been written during the reporting period (all Emails in IAB from BYU professors will need to be included as well as papers/research presented at conferences, including student research).
- Where people have travelled internationally, (you will probably have booked the travel. If you did not, you can check Y-Expense history).
- Countries that students and professors have been collaborating with, if any
- What people, organizations, etc. that people have been collaborating with that are not SHREC members.
- IAB Members this year (if they have paid membership fees this year)
- You can look at past reports to see the type of answers you should have.

Supplemental Grants:

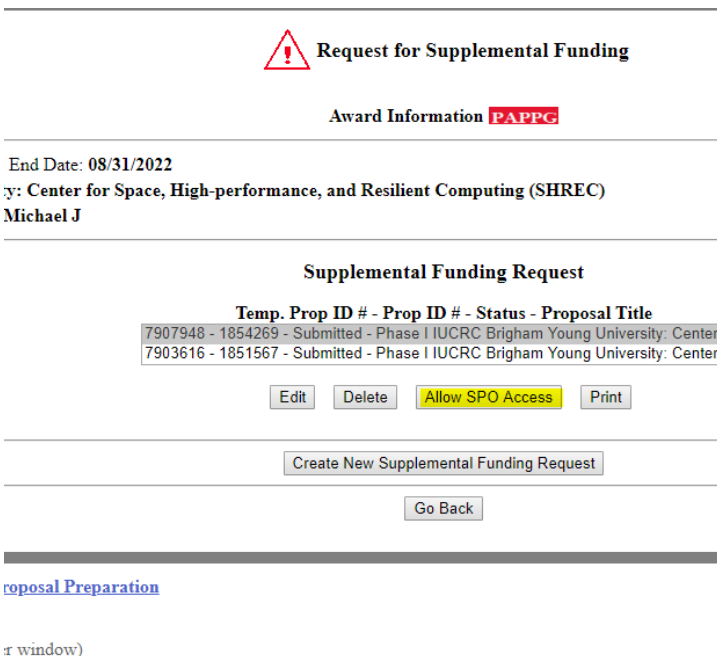
Go to https://identity.research.gov/sso/UI/Login?module=nsf&env=prvw&app=portal

Log in using Dr. Wirthlin's credentials. Then click on "Awards and Reporting" and then "Award Functions." This will take you to an older-looking site.

Click on "Award and Reporting Functions." Then Click on "Supplemental Funding Request." Then click on the main award you want to submit this supplement under. Currently it is the first one on the list. Click "Create New Supplemental Funding Request" and start editing. If you want to view past supplemental funding requests, just click on them in the window, click print and "Print Entire Proposal." Many times we reuse verbiage from past reports for new ones. Dr. Wirthlin will tell you what he wants to change from the most recent report. Past supplemental reports can be found under Admin Files>Grant Info>Supplemental Grants.

You will need to fill out an ORCA summary sheet, which is an Excel file found under Admin Files>Grant Info>Supplemental Grants. You will just need to update the information for the particular supplemental grant you are submitting. A lot of the information will stay the same. Send this file to Dr. Wirthlin when you email him that the supplemental request is ready. Include an attachment of the supplemental request by printing the report to PDF.

Once Dr. Wirthlin has looked over the supplemental, edited it, and Okayed it, you will need to give view and edit access to Debbie in the ORCA office. To do this, go to the homepage of the supplemental funding portal and click on "Allow SPO Access," then click on the button that says, "Allow SPO to View and Edit" (or something like that).



If the report is done correctly, she will submit the supplemental grant to NSF for consideration.

Some other supplemental grants that you and Dr. Wirthlin may look into for funding are I will include links to the NSF pages for these in the Helpful Links section of this document.

REU: Research Experience for Undergraduates (they like to see us hiring diverse and underrepresented students)

RET: Research Experience for Teachers (teachers in the community)

INTERN: This is a program for graduate students where NSF provides up to $50,000 for graduate students to go and intern somewhere in Industry.

VRS: This is just like an REU or RET but for Veterans. The NSF Link to this page explicitly explains who qualifies as a veteran (not ROTC)

Partner's Report:

Each year, Nicole at Pitt will email you with a spreadsheet asking you to complete BYU's portion of the spreadsheet. This is the "Partners Report," or "site report." You should have a lot of the information already if you are steadily compiling for the annual report. Nicole will probably send you the report from last year for reference. It is self-explanatory and has instructions on the first tab of the spreadsheet if you need it. When Dr. Wirthlin has looked over you answers, you will just email the spreadsheet to Nicole and she will submit it.

Lab Cleaning Checks:

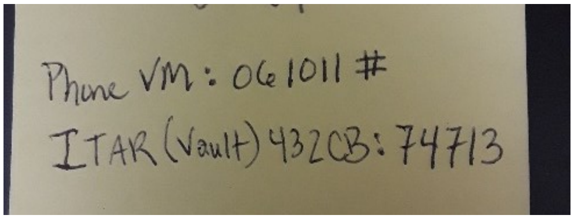
From time-to-time, Dr. Wirthlin will ask you to facilitate lab-cleaning checks. For the cleaning check, students will need to clean out their desks and drawers. The easiest way that I found to get students to sign up for cleaning checks was to send them a link to a google sheet with spaces for them to sign up on. I did cleaning checks in 5-10-minute increments. Usually the cleaning check did not take that long. You will need to ask the students if they use all of the items that they have at their desk sand make a list of the items that belong to the lab so that there is a record of where everything is.

Door Codes:

You will be in charge of the door codes for the ITAR lab. The ITAR lab is the lab that holds projects that government agencies, like NASA, are interested in and are collaborating with SHREC to complete. Because of this, only certain people are allowed in the ITAR lab and only certain people can have the code to the lab. Since these are U.S. government projects, only U.S. citizens are allowed in the ITAR lab and a list is kept with who those specific individuals are. The door code must be changed twice a year to make sure that the lab is kept secure and that only people who are actively working on ITAR projects still have access to the lab. You will need to find Joe Bussio in the EE/CE workshop and talk to him to get the door code changed. You will need to give him a random 5-digit code and he will go and change the door code for you. I currently change it in Spring and Fall.

The Lab (460 CB) also has a door code, which is currently 75912. Your silver key will also open this door and almost any door in the old ECE department offices.

Here are the current codes for ITAR and your Voicemail:



ITAR Access:

You will be in charge of access to the ITAR room. ITAR stands for International Traffic in Arms Regulations. Some of the SHREC members are people like NASA or the DOD who have sensitive materials and technology that they want to collaborate with BYU's SHREC Center on. Because the materials are so sensitive, BYU has to have a special room to keep the equipment in. This room will have a coded lock that will be changed every quarter (as of this writing, the last time the code was changed was September 2018). Anyone who is allowed in the room has to be a U.S. Citizen. You will be in charge of keeping track of who is allowed in the ITAR room. There is a blue folder that you will be given that will have ITAR forms in it. Before someone is allowed in the ITAR room, you will have to have them sign the paper. This paper makes them aware that if they steal anything it is a federal offense and that we will be validating their U.S. Citizenship with BYU. To verify the student's U.S. Citizenship with BYU you will have to go and talk to Janalyn in the EE/EcC office. Because she is the department's advisor, she has access to a page that will show if the student is a U.S. Citizen or not. Ask Janalyn to print out the page and staple it to the ITAR form that the student signs. You CANNOT show the page with proof of citizenship to anyone but Dr. Wirthlin because of FERPA laws. If BYU's ITAR room gets audited and someone from the government asks to see proof of citizenship for all of the students, you are not allowed to give it to them. They will have to go through BYU's legal services to get those papers. Once a student has graduated or no longer needs access to ITAR, then shred their proof of citizenship page and put their signed ITAR form in the back of the folder. Once this is done, email Lissa Camacho in the Dean's office with the student's name, BYU ID number, and expiration date for when they will no longer need access to the room.

Hiring:

You will be in charge of helping to hire students. For each new hire, first email them the 2 attachments "I-9…" and "Safety Training" in Admin>CCL>Student Employment. After those are completed, you will have them meet with you and fill out the New Hire Form, which has a checklist of the things you need to do, including but not limited to: getting them setup on the FPGA server, creating a wiki page for them, and going through the new student checklist with them. The New student checklist can be found in the Admin files>CCL Info>Student Employment. The instructions to add people to the FPGA server and wikis is under the tab “add-network-user” on the CCL wiki. Details on completing these hiring tasks are in the CCL Wiki section of this booklet. You will probably choose which financial account to put the student on. Check with the advisor on the wage rate they want for the student and/or use the wage rate guidelines in the admin files. ***NOTE: Make sure when you submit the financial ticket to get the student hire that you request Mark to make you the student’s Y-time manager so you can keep track of this student’s hours. We have to report these hours to NSF in our annual report.

IMMERSE

Each summer, Dr. Aaron Hawkins heads several faculty with mentoring undergraduate student projects. Dr. Hawkins will ask you to help out with Immerse in several ways.

1. In February when IMMERSE applications are due, Dr. Hawkins will contact you about helping to sort the students and assign them to faculty members for mentorship. The way we did it for 2019 was to eliminate students with a GPA lower than 3.0 and then to ask faculty to look through the list of applicants and let us know who they were interested in interviewing. They were also supposed to tell me if they had already arranged with a student to work with them. The faculty were supposed to submit twice the amount of names as the number of students they were looking to hire. Dr. Hawkins and the IMMERSE committee got together and divvied up the students based on their research interests and how many students each faculty wanted to hire. We gave each faculty member twice the amount of applicants as the number they wanted to hire. The faculty then interviewed their “teams” and those they didn’t want to hire got put into a “second pool” which other faculty could then pick from if they were still looking. Dr. Hawkins will probably have specific ideas about how he wants this completed.
2. Attend weekly meetings (if you aren’t too busy) and taking care of the student papers. Sometimes the department orders pizza for the meetings, which you can enjoy with the students.
3. Take care of the papers: Upload all the beginning proposals and final papers for Immerse students to BOX in the shared folder you have with Dr. Hawkins. (Students will email you their papers). Record which students turned in which papers on a spreadsheet in the BOX folder. At the end of August, send Dr. Hawkins the downloaded spreadsheet via email. If you don’t have access to the BOX folder, ask Dr. Hawkins to give you access.

Students Leaving the Lab:

When students leave the lab they have to go through a checkout process. For this process, you will need to send them a link to “leaving_student_checklist” from the “admin” section of the CCL Wiki. One of the items on that list is for them to have a final cleaning check with you that they are in charge of scheduling with you. It usually doesn’t take longer than 5 minutes to do a cleaning check. If students are just leaving for the summer, but coming back to the lab in the fall, then have them complete the "leaving_for_the_summer_student_checklist." When the student leaves lab permanently, move their CCL wiki page to the "alumni" section. Check under the Wiki section of this document for instructions on moving pages.

Mailing:

From time-to-time Dr. Wirthlin will have you mail items. If he has you mail letters/regular-sized envelopes, ask the secretaries if we have stamps and drop it at the mail slot outside the dean's office on the second floor (a slot in the wall of the hallway by room 204 EB). If we don't have postage, go to the mail desk in the BYU Store basement to mail it. You can buy postage there with the campus card (borrow from secretaries, fill out a PO afterwards). If you mail something that is time sensitive, mail it with a carrier that will give you a tracking number so that you can watch to make sure that it arrives.

If you're shipping a package, go to BYU Print and Mail's website and go to Mail Services. In the online service section click on the link for "Shipment Request and Pickup." The link will ask you to login with your BYU netID and then have you fill out the request form. The form will ask if you want the package picked up. Select yes (it says it is $1, but I never see those charges pop up on our accounts. Maybe they just add it to the shipping cost). The form will ask where you want it picked up (the Dean's office of the Engineering Building, 204 EB), if you have a prepaid shipping label or if it's going to be charged to a department account, where you are shipping it to, what carrier you want it shipped with, etc. Once you have this form filled out and submitted it will give you a number that you need to write on a sticky note and tape to the box. Once you've done this, take it down to the Dean's office on the second floor (204 EB) and give it to the secretary. BYU print and mail will send you an email once they have sent the package. The email will have a tracking link as well.

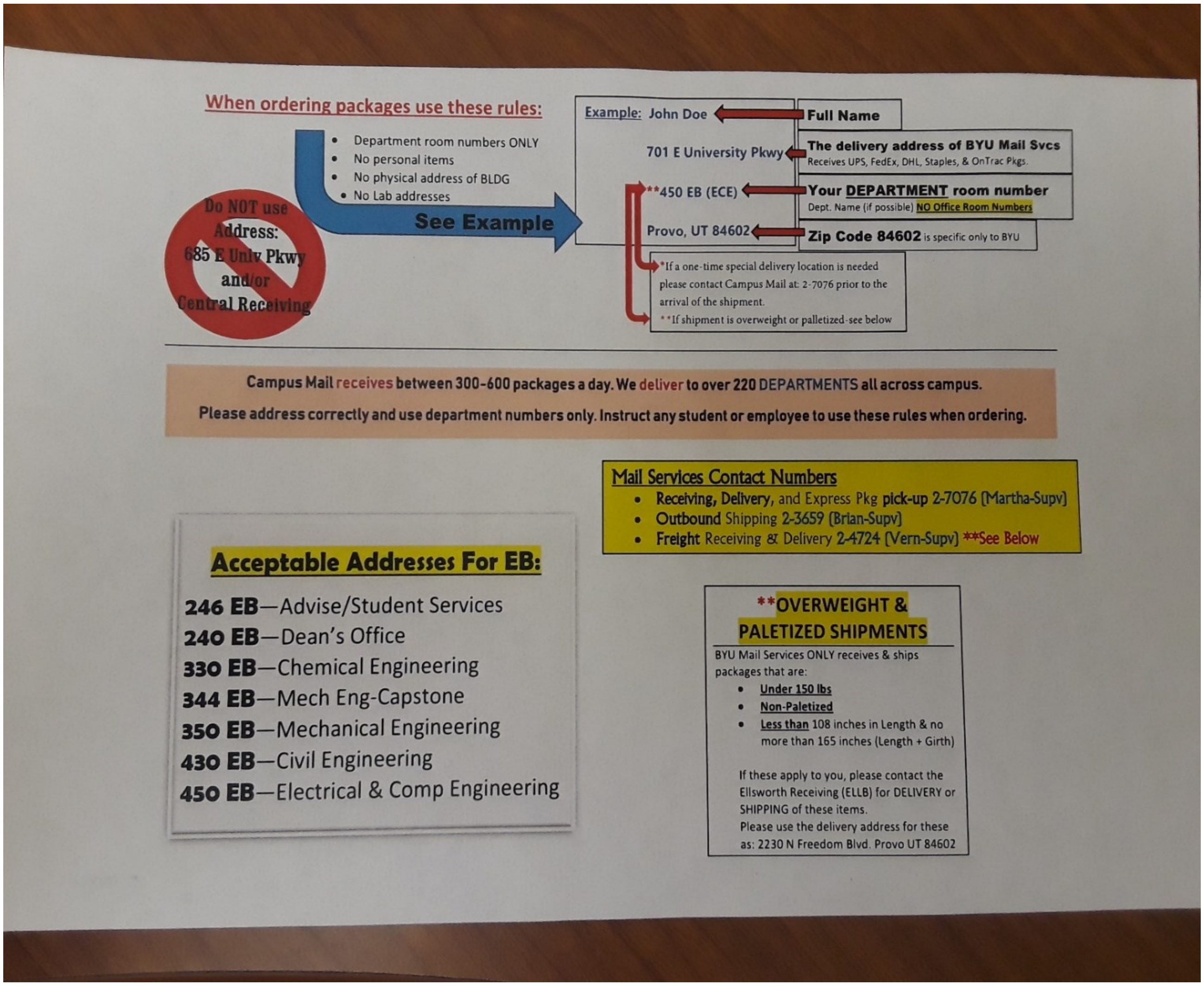
If you are mailing something that is extra heavy or large and you need to send it internationally (and thus need to clear customs in a foreign country), here is what you need to do:

1. Call BYU Shipping/Scheduling services at 422-3018 and talk with the international shipping specialist about the options you have for mailing it (FedEx, DHL, etc.). You can also email mail_scheduling@byu.edu *Some people use Carnets when shipping internationally, but we never have used one and things have gone smoothly, so we avoid them because they are expensive.
2. BYU has accounts for most major shipping companies. The company I used last time I had to ship something like this was DHL. I talked with Brian Bates, the shipping/scheduling manager, and Jesse, the international shipping specialist.
3. Jesse contacted their DHL customer service rep, **Amy Wagner**, who watched for our shipment and updated us with the shipment's travel progress all along the way. Amy

was great to work with. There will also be a DHL tracking link that will update you on the status of the delivery and customs clearance. Here is Amy's information: Amy Wagner, Key Account Executive Tel #: +1-877-873-2521 ext:53297 Fax: 480-383-7423 amy.wagner@dhl.com

4. On the day I wanted to have the server leave the US, I submitted an online shipping request (see above for details) and got an RTS number, which I taped to the computer server we were sending. Jesse and Brian were expecting the shipment that day, as I told them earlier to watch for it.
5. We didn't have a box large enough for the server we sent, so we personally drove the server to the University Press Building and dropped it off with Jesse. We arranged ahead of time to have them package and box it for us (which they can do for any shipment, but for a fee). I dropped it off as early in the morning as possible so they would have time to box it up and send it out that day.
6. Because BYU shipping and a DHL rep were both aware of our shipment and had told us what we needed to do before-hand, the shipment went off without a hitch and the server arrived on-time. Make sure to arrange these things ahead of time and ship a few extra days early in case there is a customs problem.
7. For shipping stuff back from another country to the US, contact Amy Wagner (info above) and ask her what we need to include with the shipment. On a couple of boards we had returning from the UK, she had us fill out form US3299 from the Department of Homeland Security. I have a copy of this form under Admin>Travel receipts. We included that with the shipment. We gave the DHL account number of BYU (960594348) to the people shipping the board back from the UK (so they could charge us for the cost) and emailed Mail scheduling so they would expect the package and would charge SHREC. Amy offered to watch the shipment coming back from the UK to the US, but it arrived before we even contacted her about it.
8. Things to note on international shipments: shipments with value less than $800 don't incur duties/import taxes as long as you ship them as "personal effects" (aka CF3299 (Declaration for free entry of personal effects), assign the shipment as "proforma invoice" as opposed to "commercial invoice" when prompted on the shipment creation on DHL.com, and the US3299 form mentioned above is filled out and included with the shipment. If you have questions, contact the DHL rep for BYU (Amy). She will guide you through the process.

NOTE: If SHREC students or faculty are trying to take computer parts, etc. with them to the airport when they are flying internationally, have them check the bag holding the parts. In the bag, have the above-mentioned Unaccompanied Baggage form filled out (form in Admin Files> Travel Receipts>US3299…) and have a receipt showing the parts were purchased or donated in the United States. This is mainly if customs stops someone on the way back into the United States. If you don't have these papers, the United States may think you bought the items abroad and will make you pay import taxes on them.



Odd Jobs:

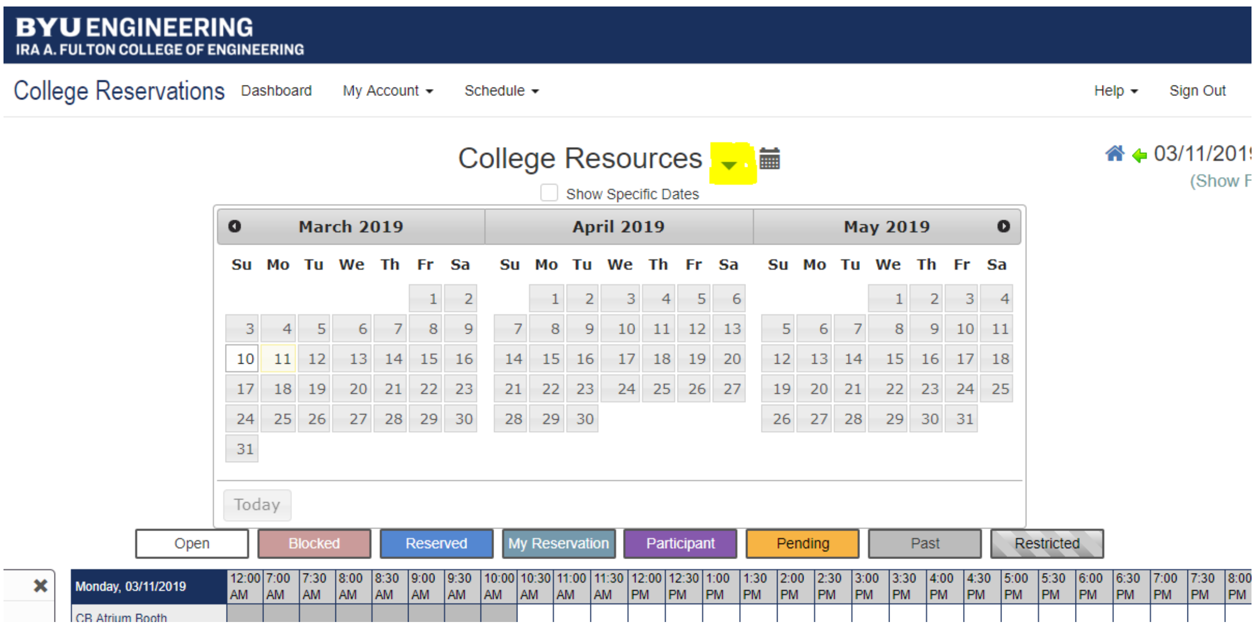
Sometimes you will be given odd jobs or things to do for the professors that does not necessarily have anything to do with SHREC. One odd job that I have done from time to time is have one of the professor's students come to my office to take a test that they missed. You may be asked to review grant documents, accounts, etc. for different projects that are not connected with the SHREC center. I liked these projects because it gave me a broader view of the research being done in the department.

Reserve a Room in CB or EB:

Go to the bookmarked link https://reserve.et.byu.edu/reservations/Web/index.php

Sign in with your CAEDM account. If you ever need access to department websites, etc, make sure to put in a ticket with IT.

If you want to reserve a room for lab meetings, etc, select the select the date and time across from the room listed. If you use the drop down menu (highlighted), more rooms show up that you can book. Once you click on the date and time you want to reserve the room, just fill out the form the link will take you to and save it. Some rooms need approval from the department to be booked, but most do not.



How to Surplus Items

All Computers and Monitors need to be taken to Michael Chambers's office when Dr. Wirthlin asks you to surplus them. Michael will see if the department has any other use for the computers or monitors.

All other items (equipment, furniture, supplies, etc.) need to be surplused through BYU Surplus. The directions for specific equipment can be found at this link under Capital and non-Capital equipment:

https://finserve.byu.edu/accounting/surplus-procedures

Helpful Links:

Here are some links that I found useful while I had this position. Most of them are already on your Google favorites bar for the SHREC Google account.

Ticketing System to submit Financial and/or IT requests:

https://ece.byu.edu/ticket/index.php

Google Drive

https://drive.google.com/drive/u/0/my-drive

CHREC/SHREC website

http://www.chrec.org/

NSF REU info

https://www.nsf.gov/pubs/2013/nsf13542/nsf13542.htm#toc

NSF RET info

https://www.nsf.gov/pubs/2017/nsf17575/nsf17575.htm#toc

NSF INTERN info

https://www.nsf.gov/pubs/2017/nsf17091/nsf17091.jsp

NSF VRS info

https://www.nsf.gov/pubs/2014/nsf14124/nsf14124.jsp

BYU Electrical Shop

http://plantwo.byu.edu/building/power.html

BYU Transportation Services and Vehicle Rental

http://plantwo.byu.edu/transportation/motor_pool.html

BYU CCL Wiki

https://ccl.ee.byu.edu/wiki/doku.php?id=lab_expenses

BYU CHREC Wiki

https://chrec.ee.byu.edu/wiki/doku.php?id=admin:coordinator:tasks

BYU Reliability Wiki

http://reliability.ee.byu.edu/wiki/doku.php

BYU Box

http://box.byu.edu/

Reserve a room in the EB or CB for lab or trainings:

www.reserve.et.byu.edu

Passwords:

The front desk will have many accounts that are used by the whole department. Here are the ones that our lab uses. Some of these you will want to change so that your email is the user name. These are the accounts as of now:

ITAR Room: 74713

Phone Voicemail pin: 061011#

459 CB: 880810#

Outlook Email:

Shrec_coordinator@byu.edu

Username: shrec-coordinator

Password: SHREC4

Gmail: (Only for Google Docs, sheets and forms- not for emailing)

Shrec.coordinator@gmail.com

!SHREC14!

Recovery email is shrec_coordinator@byu.edu

AirBnb (For group research trips)

Sign in with shrec.coordinator@gmail.com credentials

Boomerang Carnets (only use if traveling with things internationally worth more than $2,500)

https://webapp.atacarnet.com/WebApp/Dashboard.aspx

username: shrec_coordinator@byu.edu

Password: SHREC4

ISIS Science and Technology Facilities Council (Rutherford Lab)

Username: Shrec_coordinator@byu.edu

Password: !SHREC4!

ALL Wikis:

Username: NetID

Password: Normal NetID Password

Grants.gov (never used this, but just in case you need it)

Username: shrec_byu

Password: Sphprc19!

(Sp for Space, H for high, P for Performance, R form resilient and C for Computing)

Dr. Wirthlin's NSF/Fastlane login:

ID: 00332023

Password: Shrec20!9

CHREC Grant #: 1265957

SHREC Grant #: 1738550

CHREC Website: www.chrec.org (There is not a SHREC website currently)

ID: shrec

Password: **RTL128HLS512**

(Note: Dr. George will update password before each conference)

IAB LISTSERV

https://listserv.byu.edu/cgi-bin/wa?INDEX&X=6B8AB17E5F003BDFA6&Y=shrec_coordinator%40byu.edu

shrec_coordinator@byu.edu

SHREC4

L.I.F.E. Forms

www.iucrc.com

username: shrec_coordinator@byu.edu

Password: SHREC4

Password for member to access the L.I.F.E. Forms: shrec4ward!

If you change the password, change it to the same password as the Chrec Website (What Dr. George chooses)

OSH Park – to order parts for students

Username: shrec_coordinator@byu.edu

Password: SHREC4

Dominos Pizza:

Username: shrec_coordinator@byu.edu

Password: !SHREC14!

PayPal: (Joe Bussio's account)

Username: ecen_secretary@byu.edu
Password: Nonlinear123

OSH Stencils – to order boards for students

Username: shrec_coordinator@byu.edu

Password: ccl.Admin17

Avnet.com

Username: hope_collins@byu.edu

Password: ccl.Admin17

If a student asks you if there is an account for something and Luke Newmeyer (an old student) was the original account owner, then the user info is the same as it is for OSH Park/Stencils.

Store.arduino.cc

Username: shrec_coordinator

Password: BYUSHREC4

www.polulu.com

Username: shrec_coordinator@byu.edu

Password: BYUSHREC4

Lego Education

https://education.lego.com/en-us

Username: shrecbyu4

Password: SHREC4

Arrow

www.arrow.com

Username: shrec_coordinator@byu.edu

Password: !Shrec14!

PCBWAY

Pcbway.com

Username: shrec_coordinator@byu.edu

Password: !SHREC14!

JLCPCB

Username: shrec_coordinator

Password: !Shrec14!

BYU Handshake (for posting jobs to student community)

Username: shrec_coordinator@byu.edu

Password: BYUSHREC4

FedEx (I never use this, have BYU Print and Mail make the label and give them the FEDEX account of the university-Secretaries should have- or the account of the person receiving package if they offer to pay)

Username: ShrecCoordinator

Password: !Shrec4!

University's **FEDEX account** number (to give to people so we are charged for shipping):

128165428

XILINX

Username: shrec_coordinator@byu.edu

Password: !SHREC14!

HiTech Global

Shrec_coordinator@byu.edu

Password: SHREC14

Initial SHREC Duties for First Ever SHREC Coordinator:

This is the list of the duties for my position that the first coordinator (Hope) was given when I first started. This is just a reference in case Dr. Wirthlin needs it. It can also be handy to see what Dr. Wirthlin thinks is a high priority. However, I wouldn't pay too much attention to it since it is a list from 2 years ago and things have changed. If you ever run out of things to do, just ask Professor Wirthlin and he will have something for you to do.

Starting Tasks (first day or two) [I crossed these off as I went so that I knew how much progress I was making]

- Get hired and do any training that is necessary (Mark Ormsby)
- Get room setup with phone (get any supplies/equipment necessary for job, painting, bulletin boards, etc.) (Kris Bess)
- Get a department mailing box (Kris Bess)
- Get a department key (Kris Bess)
- Calendaring important dates
- Dec 5-6 - CHREC/SHREC workshops in Gainesville, FL (University of Florida) - it would be nice if you could attend. You will likely be helping with the coordination and planning of this meeting.
- Jun 5-6 - SHREC workshop in Provo. You will be the coordinator of this meeting.

Short Term (First week)

- Go into room CB 461 and introduce yourself to the students.
- Attend lab meeting on Thursday at 10:00 in room 460 CB. Introduce yourself to everyone
- Manage the "treats" for the Thursday meeting (instructions on this will be given)
- Introduce yourself to the faculty working in the lab (Nelson/Wirthlin/Goeders/Hutchings)

- Contact Marcos Orfila (execsec@byu.edu) and meet with him to talk about his tasks associated with CHREC coordination (weekly reports and pay period hours).
- Get the “CHREC” binder from Marcos
- Meet with Kris Bess to talk about the SHREC workshop in Provo (June 5-6, 2018)
- Kris has started the process of this and has some materials that you will need to take over.
- Contact Nicole Gannon (nmgannon@pitt.edu) and University of Pittsburgh. She is your colleague at Pitt coordinating the center there. Introduce yourself and perhaps have a phone call chat. She will be sending documents for you to read (planning documents for our semi-annual workshops).
- Setup a “Wiki” page for yourself on the lab wiki (Andrew can help you with this)
- Read NSF I/UCRC materials
    - General I/UCRC background
        - https://www.nsf.gov/eng/iip/iucrc/home.jsp
    - CFP for I/UCRC (specifically the one we implemented)
        - https://www.nsf.gov/publications/pub_summ.jsp?WT.z_pims_id=5501&ods_key=nsf17516
- Visit the CHREC website and carefully review the materials on this site
    - www.chrec.org
    - Members Only section: (username:chrec password:CA72bingo)
- Read the SHREC proposal (I can email it to you when you are ready)
- Meet with part time secretaries (Erika, Elaina, etc.) to learn how to:
- Process travel reimbursements
- Make credit card purchases

Medium Term

- Take over budget responsibilities (go over budgets and accounts together)
- Meet with and get to know BYU staff working with us
- Kristi Chase: Research Accounting
- Debbie Silversmith: ORCA
- Wiki - Need to setup and improve access controls (different roles: faculty, admin, and student)
- Start working on travel and plans for the December SHREC/CHREC workshop at UF
- Flights, posters, presentations, etc.
- Start working on SHREC workshop in June
- Venue, hotels, details, etc.
- Edit
- Ongoing Tasks

Weekly [The Weekly and onward lists were the ones that I found to be most important. They helped me to make sure that I completed everything each week]

- Check weekly reports for each student in the lab (and record - keep a record of weekly report progress)
- Weekly organization meeting with faculty to go over tasks and issues.
- Organize and attend lab weekly meetings (Thursday at 10)
    - arrange for treats (and fill out paper work)
    - discuss any issues
    - become familiar with what students are doing
    - Manage schedule of speakers and send out reminders
    - Take attendance

Each pay period (bi-weekly)

- Check the hours of each student in the report and log in the spreadsheet. Update the following stats for each person: total hours for semester, total hours for tax year, average hours per week. Identify problems of working too little or too much.

Monthly

- Review the budget from Mark (have Mark teach this person how to do it)
- Meet with me to go over budget and budget issues each month.
- Manage the invoices and payments for all equipment ordered through the month (wiki of purchases)

Each semester/term

- Submit report to Mark on all tuition payments and all (contact students to get this tuition information)
    - Figure out how much tuition credit each student has
- Manage the end of semester lab parties (get pizza, fill out forms, reserve room)

Bi-Annual CHREC meetings

- Manage all travel (airlines, hotels, cars, etc.) for students and faculty going to CHREC meetings. Manage the expense reports for CHREC meetings (for both faculty and students)
- Work with students to get and print posters.
- Post materials on the wiki and email to Herman/Alan

Yearly

- Lead effort on yearly CHREC report (prepare for report before year’s end)
- Submit annual REU supplemental proposal

- Follow-up on MIPR payments and process
- Edit
- Other Tasks

High Priority

- Manage purchasing of equipment and supplies, shipping
- Respond to Issues brought up by other SHREC centers
- Respond to short-term faculty needs
- Manage hiring of all students (working with Mark).
  - Work with students through the new student checklist
  - Manage all "exit" procedures for students (clean up desks and check, take down signs, update wiki, etc.)
- Manage budget: (track items, create budget sheet for each project to be given to each faculty member)
- Work with administrative assistants at other universities in miscellaneous administrative issues
- Planning for CHREC workshops
- Manage the CHREC workshops for Provo/Utah
- Manage all travel
  - CHREC workshops with students
  - Student travel
  - Plan my travel (work with Karen), submit my expense reports (learn how to do this)
- Follow-up up on membership payments
- Cost sharing reports (NASA)
- Complete any reports (NSF, etc.)

Medium Priority

- Quarterly CHREC member reports
- Carefully document everything you do (create a manual explaining the duties for next person to take over).
- Manage/Clean up Wiki pages
- Manage administrative work associated with visiting scholars and students.
- Manage the IAB mailing list
- Manage the membership agreements
- Submit all NSF supplemental requests (CORBI, REU, supplemental requests for MIPR)
  - Understand how the NSF payment system works and manage the payments to CHREC including MIPRs, NSF yearly support, etc.
- IMMERSE management
- Manage the laboratory infrastructure

- Keep the lab seating assignments wiki page up to date (better records of)
- Create name tags for everyone
- Manage the cleaning and decorating of the lab
- Help clean up lab (bring old lab stuff to weekly meetings for removal)

Frequently Used Terminology

AFRL: Air Force Research Lab

Advisors: Refers to the four professors at BYU advising SHREC students. Currently includes Drs. Wirthlin, Goeders, Nelson and Hutchings.

B1 and B2: BYU SHREC's two overarching projects. B1 is Rapid FPGA Design Prototyping and Implementation. B2 is Reliable FPGA-Based Systems. Most students work on B2.

CCL: Configurable Computing Lab (Where the students work in 461 CB and 459 CB)

ECEN: Electrical and Computer Engineering (Department)

I/UCRC: Industry/University Cooperative Research Center (e.g., SHREC)

IAB: Industry Advisory Board (e.g., Sandia National Laboratories, Raytheon, etc.)

ITAR: International Traffic in Arms Regulations

FPGA: field-programmable gate array. BYU SHREC specifically works with these. Wikipedia says an FGPA is "an integrated circuit designed to be configured by a customer or a designer after manufacturing."

JCM: JTAG Configuration Manager. A small red board with three parts to it including a micro Zed. Visual. Article.

JTAG: Joint Test Action Group. JTAG Cable Visual.

L.I.F.E. Forms: Level of Interest and Feedback Evaluation Forms System

Member-sites: The universities with SHREC centers. Currently includes University of Pittsburgh, BYU, University of Florida and Virginia Tech

MIPR: Military Interdepartmental Purchase Requests

Raspberry Pi: a brand of inexpensive computer used to learn programming

RET: Research Experience for Teachers

REU: Research Experience for Undergraduates

SHREC: Space, High-Performance and Resilient Computing Center

Site Directors: Lead at the SHREC centers at universities. Currently, Drs. Michael Wirthlin, Alan George, Herman Lam and Wuchun (Wu) Feng are site directors.

Things to add:

- Process of Getting BYU Store Giftcards
- Submitting a Supplemental Request for Funds on Research.gov
- Submitting a Kuali Report