Resources at Dartmouth User's Manual

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ABOUT RADAR

RaDar (Resources at Dartmouth) is the Norris Cotton Cancer Center (NCCC) portal which allows researchers to request services from Shared Resource Departments, and to make reservations to use Shared Instruments.

Orders for both Services and Assisted or Unassisted Instrument use from Shared Resources Departments typically incur charges. Unassisted use of NCCC Shared Instruments does not incur charges.

Administrators for Shared Resource Departments and Instruments use RaDar to manage orders and any associated billing and reporting.
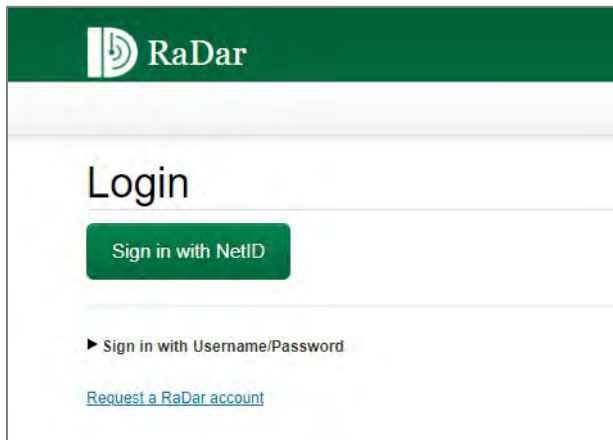
REQUEST A RADAR ACCOUNT

All RaDar users must have a Dartmouth NetID. Individuals not associated with Dartmouth, can request a sponsored NetID account.

To request an account, email ccops@dartmouth.edu.

Please provide the name and email that should be associated with the account, as well as your NetID if you have one. You will need to provide a billing chartstring number to associate with the account. The chartstring is required regardless of your use of chargeable resources.

LOGGING IN

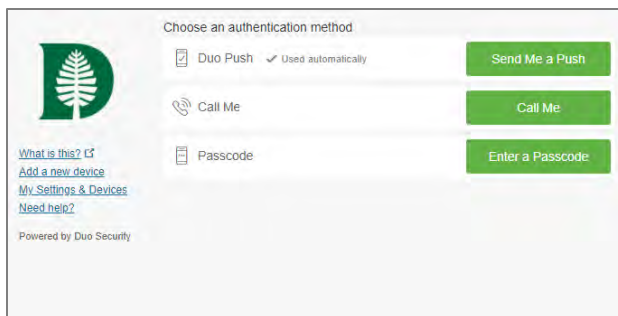Go to radar.dartmouth.edu/users/sign_in

DUO SECURITY

You may be requested to use Duo Security as a secondary authentication to log in.

For more information on Due Security, visit:
services.dartmouth.edu/TDClient/1806/Portal/KB/ArticleDet?ID=64933

BROWSING RESOURCES

NOTE:

Dependent on your level of system access, there may be slight variations to what you see on your screen. These instructions are intended to cover the functions for standard resource users.
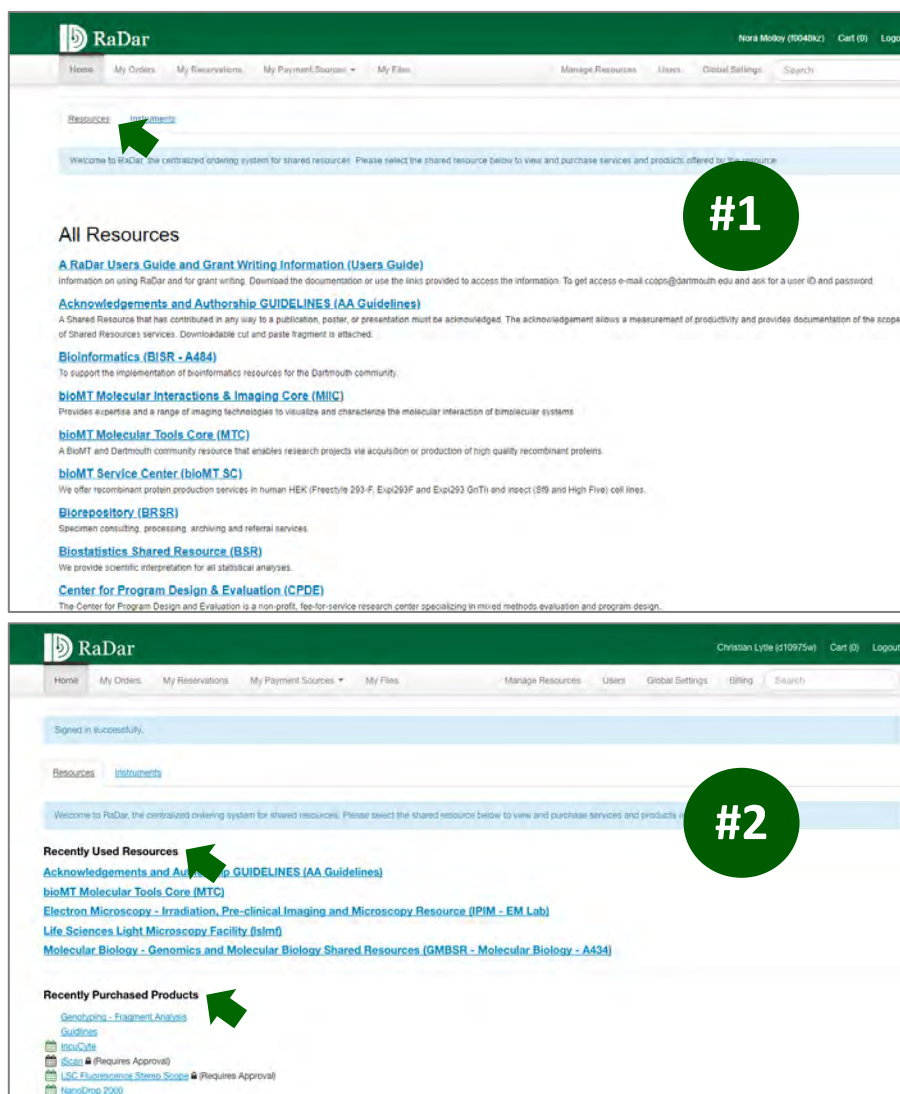
RESOURCES TAB:

This is the RaDar homepage (**FIGURE 1**) which shows a list of the resource categories (i.e. NCCC Shared Instruments) and shared resources "cores" or departments (i.e. Life Sciences Light Microscopy Facility.)

Note that within these categories and departments, RaDar users can request both Services and Instruments. Services and Instruments have slightly different process flows through the system, and both will be described in the coming pages.

> **Figure #1** below shows the view of the **Home Page** that a new user will have.

> **Figure #2** below shows the view of the **Home Page** that will appear once a user has begun to utilize **RESOURCES**. The user's recently used resources and recently ordered products will be moved to the top of the page for faster access.

BROWSING RESOURCES *(continued)*

The Resources listed in blue include both NCCC resources, as well as resources available through other Geisel and Dartmouth entities. Clicking on the blue name of a resource category or department will take you to a page with a brief description of what is offered (**FIGURE #3**). It may be a combination of both services and instruments. You can click on an individual item name to get more information. Services and instruments are ordered in different ways. Services (**FIGURE #4**) have an **ADD TO CART** button while instruments can be scheduled by the user directly utilizing a calendar function (**FIGURE #5**). See also **Ordering Services and Reserving Instruments** on page 7**.**

INSTRUMENTS TAB

Returning to the **HOME PAGE**, adjacent to the **RESOURCES TAB**, is the **INSRUMENTS TAB**. These are the same instruments found within the different Resource Categories on the **RESOURCES TAB**, but from the **INSTRUMENTS TAB** (**FIGURE #6**), they can be searched directly.

Each instrument listed has two links associated with it. Clicking on the instrument name will take you directly to that instrument's page where you will see the description and can schedule use (**FIGURE #7**). The second link, in smaller text, is a direct link to the page of the Resource Category or Department the where the instrument is located (**FIGURE #8**).
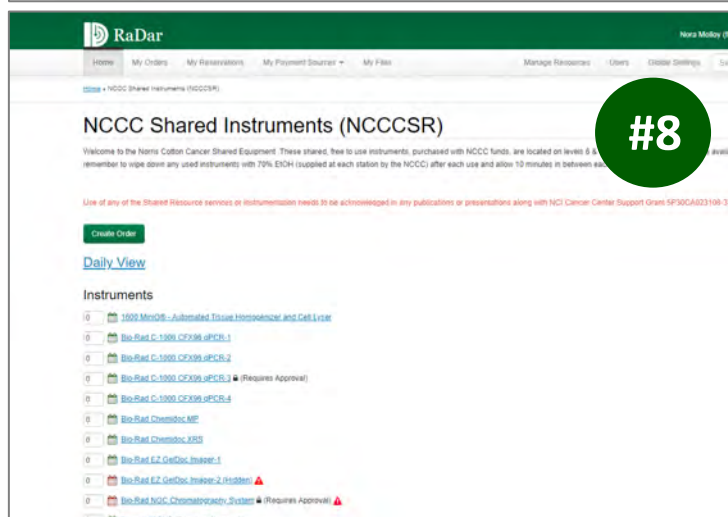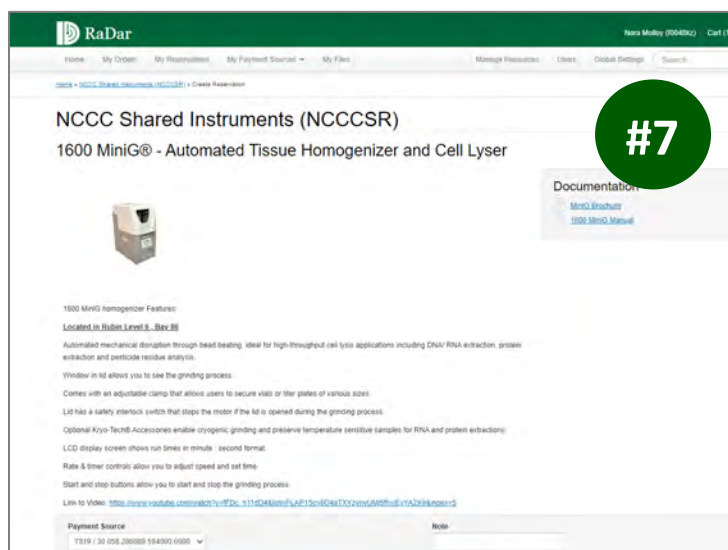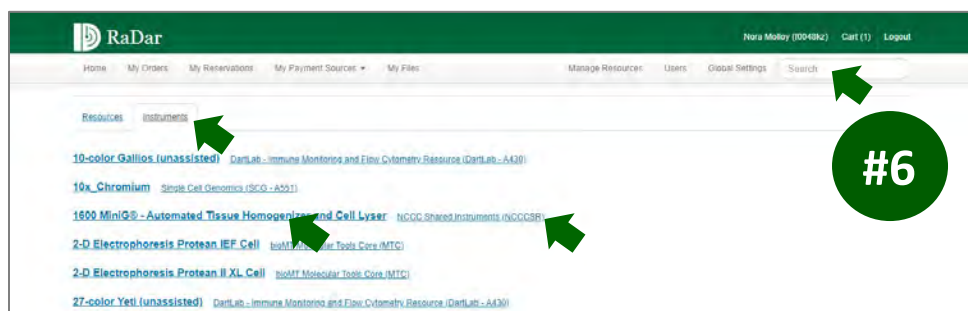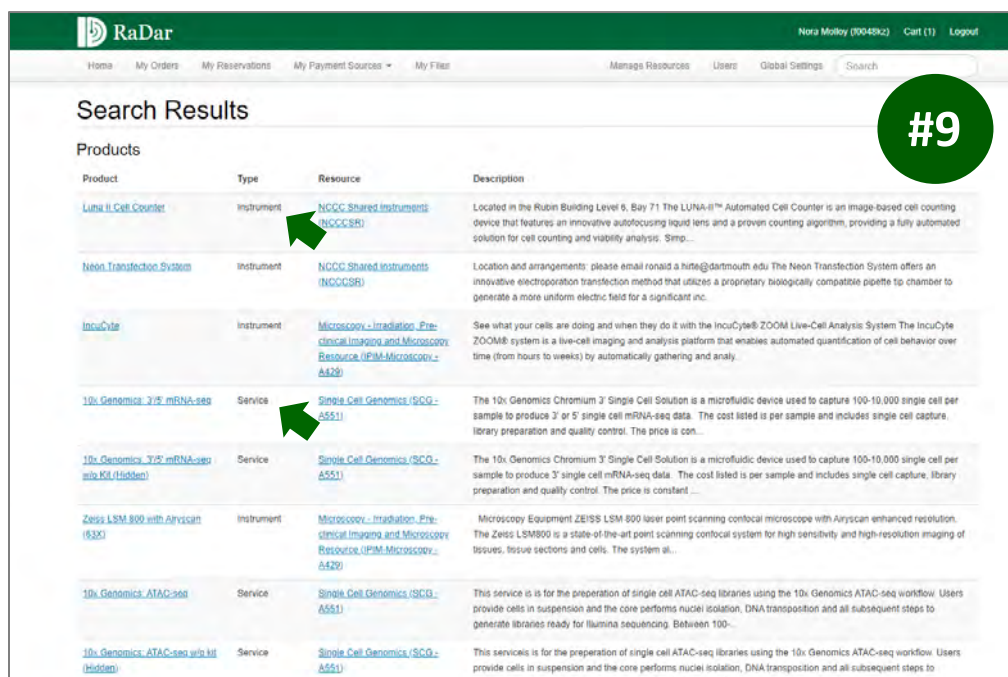
SEARCH FUNCTION

The **SEARCH** box will always be in the top right corner. Any key word you search will pull from all areas of RaDar, so you may see results from *products*, *resources*, *instruments*, *your existing reservations,* etc. (**FIGURE #9**) It is searching both titles and descriptions. This is a great tool when you need to search for a service or an instrument and are not sure where to find it.

SEARCH FUNCTION TIPS:

There are some limitations in the search function. The tips below will help you get the best results.

1. A RaDar search ***will not produce results based on partial words***. This means that searching on "molec" will not pull up all results containing "molecular". But searching "molecular" will pull up more than a dozen results. This also means that terms like "cell" vs. the plural "cells" will turn up different results.
2. Use equipment manufacturer names if known. It is a very specific search that can narrow your results. (Bio-Rad, Sorvall, Beckman etc.)
3. Use words that may be part of the description of an instrument or resource department. For example, what test or capabilities you are looking for. Terms such as chromatography or nucleic acid will turn up a diverse set of results.

ORDERING SERVICES AND RESERVING INSTRUMENTS

Ordering Services and Reserving Instruments have different processes for ordering, so they are separated into different sections below.

In general, it is typically preferred that users initiate their requests for instruments and services through RaDar, but Resource Departments and RaDar administrators do have the ability to place orders on a user's behalf if necessary.

ORDERING SERVICES

Because of the diversity of services provided, users are asked different questions specific to that service. Not all can be covered here. If you have questions, contact the Shared Resource you are ordering from directly for help.

1. Go to Radar.dartmouth.edu
2. **LOG IN** using the button in the upper right corner.
3. Click on **HOME** from the main menu.
4. Click on the **RESOURCES** tab.
5. Select the Resource Department you wish to order from.
6. Select the service you want to order and click **ADD TO CART** or **CREATE ORDER** (**FIGURE #10**).

ORDERING SERVICES *(continued)*

7. In the **CART**, (**FIGURE #11**) select the **PAYMENT SOURCE** (chart string account) you wish to use for the service and click **CONTINUE**. If you do not have an active payment source, you will need to contact your Department Business Administrator to have one added. A chart string is required for all orders even when there is no expected fee.
8. Complete any additional fields that are requested based on your selection.
9. Confirm your quantity is correct and be sure to click **UPDATE** to save any changes.
10. Click **SAVE SUBMISSION** if asked.
11. Click **PURCHASE**

Note that if you do not complete an order/purchase, the service will remain in your cart and you can access it later.

MY ORDERS TAB *(Reviewing existing orders)*

The **MY ORDERS** tab (**FIGURE #12**) lets you quickly look at both **PENDING** (incomplete) or **ALL** your service orders by toggling between the tabs at the top of the page. (Note that **MY RESERVATIONS** shows your instrument use reservations. **ORDERS** are for **SERVICES** and **RESERVATIONS** are for scheduled **INSTRUMENT** use. Clicking the blue **ORDER NUMBER** will take you to specific information about that order.
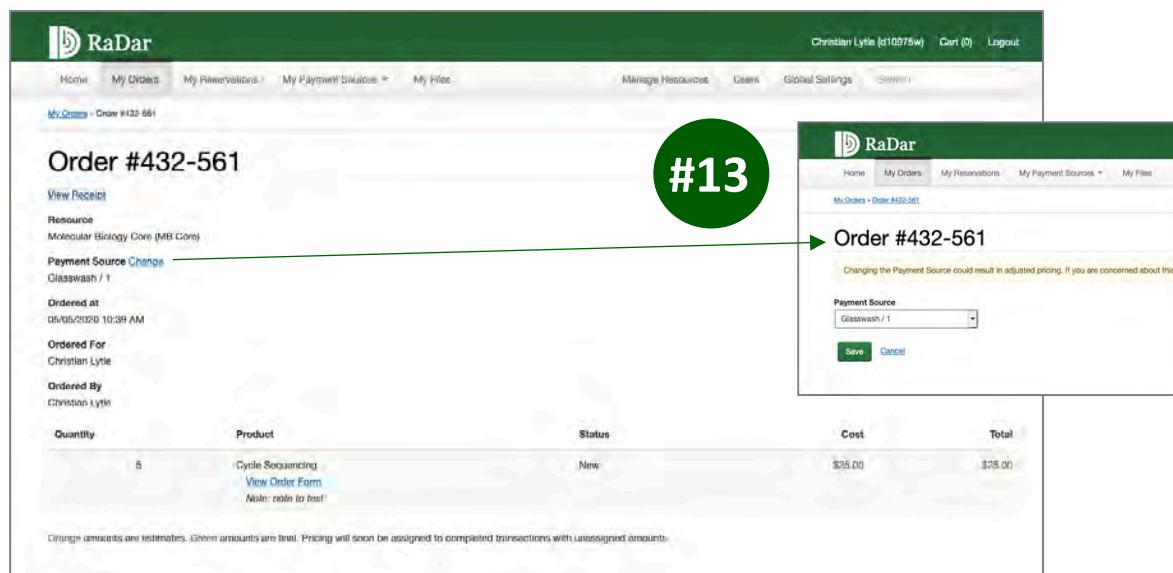
When looking at the details of a specific order (**FIGURE #13**) you can:

- **VIEW RECEIPT** (and print) if needed.
- Review and change your **PAYMENT SOURCE**.
- View the **ORDER FORM**.
- View **PRICING**. Note that the prices in orange are estimates, and those in green are final.

ORDERING SERVICES AND RESERVING INSTRUMENTS *(continued)*

RESERVING INSTRUMENTS

There are a few different navigation routes that can be followed to be able to submit an instrument reservation. This manual will cover two options.

OPTION 1:

This option is great when you have just one instrument you are looking to reserve for a single time slot.

1. Go to Radar.dartmouth.edu
2. **LOG IN** using the button in the upper right corner.
3. Click on **HOME** from the main menu.
4. Click on the **INSTRUMENTS** tab.
5. Click on the instrument you want to reserve to proceed to the scheduling page (**FIGURE #14**)
6. Select the **PAYMENT SOURCE** (chart string account) for the service. If you do not have an active payment source, contact your Business Administrator to have one added.
7. The block calendar at the bottom of the page shows availability. Select the date and times you wish to use the instrument which will then appear in the calendar below.
8. Click on the **CREATE** button. If you are making a reservation for immediate use, the button will say **CREATE AND START**.
9. A window will open and let you know that your reservation was successful or if there is a scheduling problem and you need to select a different time.

OPTION 2:

This option is great when you have multiple instruments and/or multiple time slots that you want to make reservations for.

1. Go to Radar.dartmouth.edu
2. **LOG IN** using the button in the upper right corner.
3. Click on **HOME** from the main menu.
4. Navigate the alphabetical list and open **NCCC Shared Instruments (NCCCSR)**. This would work for any of the Shared Resource listings on this page, but for this explanation, we are using the Cancer Center Shared Instruments.
5. A list of instruments will appear. You can click on an instrument name to read about an instrument. (**FIGURE #15**).
    a. Click on the calendar icon to see the availability of that instrument (**FIGURE #16**). (Note on this calendar page that you can switch between daily, weekly, and monthly views.) In the upper right corner, you can click **PLACE RESERVATION** to be taken to the page where you can set your reservation date and time (**FIGURE #14**). From here, the steps follow the same as OPTION 1.

    OR

    b. If you want to order multiple instruments, from the instrument list, enter the number of reservations you wish to make for each instrument. For example, if you wanted to reserve something for an hour every morning for a week, you could enter "5". Click **CREATE ORDER** and you will be taken to your **CART** where you can enter the details for each individual request (**FIGURE #17**).

MY RESERVATIONS TAB

The **MY RESERVATIONS** tab (**FIGURE #18**) allows you to view your instrument reservations. Use the tabs **UPCOMING** and **ALL** (includes past orders).

Clicking on your order number will bring up the details of the order and provide you the opportunity to edit the reservation.

- Click on the Date and Time to edit your reservation to a new specific date and time.
- Click on **MOVE UP** to find out the earliest possible availability.
- **REPORT AN ISSUE** if there is a problem with the instrument.
- **CANCEL** will allow you to delete the reservation.

FINANCIAL MANAGEMENT

MY PAYMENT SOURCES

From the HOME page, the **MY PAYMENT SOURCES** dropdown arrow will reveal three different options for viewing payment sources **MY PAYMENT SOURCES**, **MY TRANSACTIONS**, **MY TRANSACTIONS IN REVIEW (FIGURE #19)**.
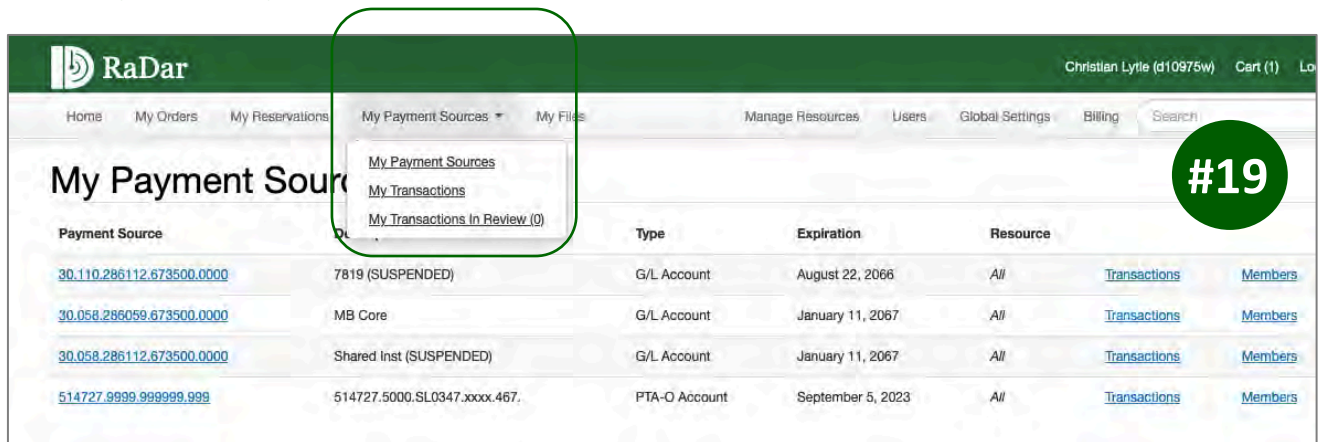
MY PAYMENT SOURCES (**FIGURE #20**) lists the active and suspended payment sources that have been associated with your account. The **PAYMENT SOURCE** account number is a link to the details and other members with access to that PAYMENT SOURCE. Information on the account includes the "Description" of the account, the "Type" of account it is, the "Expiration" date of the account and which "Resources" it can be used with. The **Transactions** link will show the transactions that have use that account. The **Members** link will show who had access to that account.
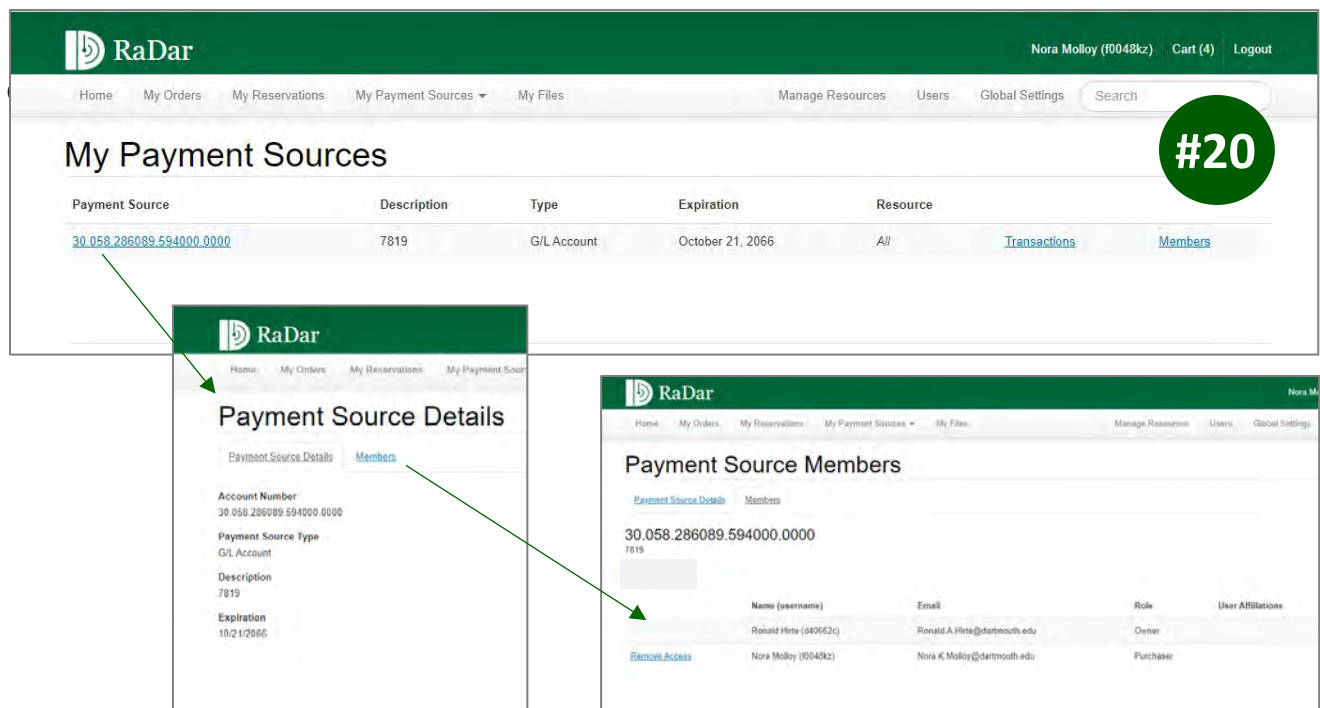
MY TRANSACTIONS

Again, from the **MY PAYMENT SOURCES** drop down in the main page menu, **MY TRANSACTIONS** allows you to search your history of past transactions. (**FIGURE #21**)

There are six different search boxes (**A**), each with their own drop-down menu, to help you define your search. You can use as many of these criteria as you wish to define your search.

On the right, are further fields to define the search (**B**)

- Click on the top box, which is unlabeled, and select the **TRANSACTION STATUS** you wish to use. **ORDERED** covers all orders. **FULFILLED** will search only completed orders. **JOURNALED / STATEMENT** will search orders that have been billed and **RECONCILED** will search those that have been paid.
- Select the **START DATE** you wish to use for your search. This box automatically defaults to the first day of the last month.
- Select the **END DATE** you wish to use.
- Click on the **FILTER** button found below the 6 search boxes to initiate the search.

Once you click on the **FILTER** button, the **TRANSACTIONS** meeting the search criteria will appear in a list below the search criteria (**C**). This list can be exported as a .CSV file using the link on the top right of the search results list.

MY TRANSACTIONS IN REVIEW

Again, from the **MY PAYMENT SOURCES** drop down in the main page menu, **MY TRANSACTIONS IN REVIEW** (**FIGURE #22**) allows you to see your any of your transactions being reviewed for payment as well as the history of transactions that have taken place.

You do not have to use search functions to see transactions waiting to be processed. However, specific transactions can be found by using the same search functions explained under **MY TRANSACTIONS** on page 14 (**A** & **B**).

Once you click on the **FILTER** button, the **TRANSACTIONS IN REVIEW** meeting the search criteria will appear in a list below the search criteria (**C**).
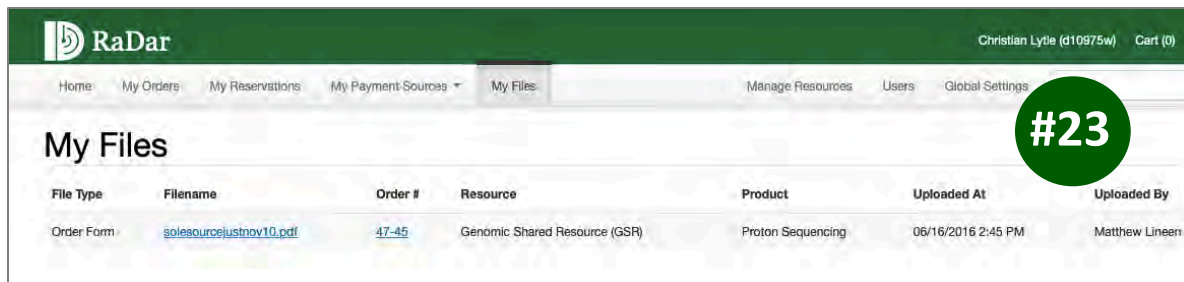
MY FILES

Service Orders often result in data files being created and attached to the **SERVICE ORDER**. The **MY FILES** tab in the main RaDar menu, allows you to view and download stored files (**FIGURE #23**).

The list shown allows you to see the File Type, Filename, Order #, the Resource department that produced the file, the Product Order and information on who uploaded it when.

To access a file from the list, click on the **FILENAME** to go directly to that specific file or click on the **ORDER #** which will take you to all the files associated with the order.