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Target Audiences

This document was written to support the activities for the following CoreResearch@Duke Job Types: Principal Investigators, Principal Investigator-Delegates, Financial Managers, and Financial Administrators.

Login Process

User log into http://coreresearch.duke.edu is required to gain access to the application. The login process validates the NetID and password provided using Shibboleth authentication. Login process determines what job types the logged in user can have in the system. Job types are assigned to the user when an account is established. A user’s Job Type determines the pages and operations available to the user. At any given time, the user can be logged into the system with only one job type at a time even though the user may have many job types assigned to them.

Users can also log into CoreResearch@Duke through the Duke@Work Portal under the Grant Management tab (under Other Grants Management Links), the Finance tab (under Financial Reports) and the MyResearch tab.

System Requirements

Supported Browsers:

- Internet Explorer
- Chrome
- Safari
- Firefox is NOT supported.

Pop Up Blockers MUST be disabled for this site.

Navigation

Site Map

On login, a site map is presented based on the access rights of the user.
Page Tabs

However, within a tramstop, there are a number of navigation options to select desired content.
Control Icons
At the top right corner of each page, you will find control icon that provide additional navigation, setting, and content features.

1. The icon creates a favorites link to list pages
2. This control will navigate the user to the landing page containing a list of save favorites
3. This icon will take the user back to the home site map
4. This button will log the user off the system
5. Clicking on this icon, will expose a list of user preferences including notification options
6. This control will clear all previous sessions
7. This button will navigate the user to the ‘System Guide’ tramstop
8. Clicking on this button, will display the Rate Table report.

Side Bar Menu
The ‘Side Bar’ menu offers additional control and navigation features.
Adding a Facility User – Linking Facility User to a PI (STEP 1 of Linking Process)

1. Access CoreResearch@Duke
2. From the ‘Account Management’ Tramline, click ‘Manage PI’ Tramstop.

3. The ‘Manage Principal Investigator’ page will be displayed.
4. Click ‘OK’ and a list of PIs will be displayed who share your fund code.

5. To select a PI to manage, click on the ‘Duke Unique ID’.

NOTE: You will only be able to manage one PI at a time.
NOTE: Once you select the ‘Duke Unique ID’, the ‘Manage PI’ page will be displayed. The top tab displays information about the PI.

NOTE: The bottom tab displays all the current Facility Users associated with the PI on the ‘Manage PI’ page.
6. Click on the ‘Add Facility User’ button.

7. Type the NetID - OR - the First Name - OR - the Last Name in the ‘Search Unique ID/NetID Name’ field.
8. Select the name you wish to associate as a Facility User to the PI. Multiple Facility Users can be added by clicking the ‘search Multiple NetIDs’ link and entering a list of NetIDs separated by semicolons. Click the checkbox of each Facility User you would like to add.

9. You will receive a message confirming the ‘Operation was Successful’ and Click on ‘OK’ in the ‘Processing Status’ box.
11. Click ‘Save’ to store your changes.

12. A confirmation page will appear to verify the save.

This Operation has accomplished three actions:

- The Facility User account has been created
- A job type of Facility User has been assigned to the user.
- The Facility User has been linked to the Principal Investigator (PI).
Assigning a Principal Investigator-Delegate

1. Access CoreResearch@Duke
2. From the ‘Account Management’ Tramline, click ‘Manage PI’ Tramstop.

3. The ‘Manage Principal Investigator’ page will be displayed.
4. Click ‘OK’ and a list of PIs will be displayed who share your fund code.

5. To select a PI to manage, click on the ‘Duke Unique ID’.

   NOTE: You will only be able to manage one PI at a time.

   Once you select the ‘Duke Unique ID’, the ‘Manage PI’ page will be displayed. The top tab displays information about the PI.
6. Select one or more individuals to become PI-delegates

7. Once the operation has been saved, a message will be displayed confirming Operation Successful.
Assigning Facility Users as Members of a Project (STEP 2 of Linking Process)

1. LOGIN to CoreResearch@Duke.
2. The Tramline page will display.
3. From the ‘Projects’ tramline, click ‘Manage Projects’ tramstop

4. The 'Project List' page will display. If this is your first time on this page, you will need to click “OK” next to the search box to refresh the page.
5. Click on the Project ID to edit a single Project, or for multiple projects, select the Projects you would like to modify and click ‘EDIT’.

NOTE: The view below is the multiple view screen.
8. Select the facility users to be associated with the project and click the ‘Select and Return’ button and the users will be assigned to the project. If this is your first time in this page, you will need to click “OK” next to the search box the refresh the page.
9. Click ‘Save’ to store the change.

Removing Facility Users from a Project (STEP 1 of De-Linking Process)

1. LOGiN to CoreResearch@Duke.
2. The Tramline page will display.
3. From the ‘Projects’ tramline, click ‘Manage Projects’ tramstop

4. The 'Project List' page will display. If this is your first time on this page, you will need to click “OK” next to the search box the refresh the page.
5. Click on the Project ID to edit a single Project, or for multiple projects, select the Projects you would like to modify and click ‘EDIT’.

NOTE: The view below is the multiple view screen.
9. The selected Facility User(s) will be removed from the Members list. Click ‘Save’ to store the change.
De-Linking Facility Users from a PI (STEP 2 of De-Linking Process)

1. Access CoreResearch@Duke.
2. From the ‘Account Management’ Tramline, click on the ‘Manage PI’ Tramstop.

3. The ‘Manage Principal Investigator’ page will be displayed.
4. To select a PI to manage, click on the 'Duke Unique ID'.
   **NOTE:** You will only be able to manage one PI at a time.

5. Under the Facility Users Tab, select the name(s) for the user(s) you would like to remove from
   the PI.
6. **NOTE:** You can remove multiple Facility Users at one time.
7. Click on ‘Remove Facility User’.

8. Click on ‘Save’.
   
   **NOTE:** You must ‘Save’ the operation to completely remove the association of Facility Users to the PI. Note: If the Facility User is assigned to a project under this PI, then the user cannot be removed.

9. Once the operation has been saved, a message will displayed confirming Operation Successful.
Placing a Project on Hold

1. LOGIN to CoreResearch@Duke.
2. The Tramline page will display.
3. From the ‘Projects’ tramline, click ‘Manage Projects’ tramstop.

4. The 'Project List' page will display. If this is your first time in this page, you will need to click “OK” next to the search box to refresh the page.

5. Select the Project or Projects and click the ‘On Hold’ button.

6. The status of the project will change to ‘On Hold’.
Activating an On Hold Project

1. LOGIN to CoreResearch@Duke.

2. The Tramline page will display.

3. From the ‘Projects’ tramline, click ‘Manage Projects’ tramstop.

4. The 'Project List' page will display and search for the projects ‘On Hold’. If this is your first time in this page, you will need to click “OK” next to the search box the refresh the page.

5. Select the Project or Projects ‘On Hold’ and click the ‘Activate’ button.

6. Projects are activated.
Request Queries

1. Access CoreResearch@Duke.
2. From the ‘Request for Service’ Tramline, click on the ‘Manage Service Requests’ Tramstop.

Manage Service Requests

Once on the ‘Manage Service Requests’ list page, there are a number of activities that can be executed to display desired Service Requests.

Historical Service Requests

The ‘Historical Service Requests’ tab displays completed, rejected, and cancelled services.
Historical Projects
This page contains all the closed projects or projects with inactive fund codes that can be accessed by the user.

Invoice Queries
1. Access CoreResearch@Duke.
2. From the ‘Manage Invoice’ Tramline, click on the ‘Manage Invoices’ tramstop.
Click the 'Manage Invoices' tramstop.
3. Once on the ‘Manage Invoices’ list page, there are a number of activities that can be executed to display desired invoices

4. Click on the ‘Historical Invoice tab to review Invoices that have posted to SAP.
Searching CoreResearch@Duke for SAP Invoice IDs

1. On SAP R/3’s Document Overview page, one can find useful information to lookup invoices in CoreResearch@Duke. For example, all documents submitted via the CoreResearch@Duke JV automation process will have the Doc Type YL. In addition, the Invoice ID and the Document Number are stored in both SAP R/3 and CoreResearch@Duke. To find an invoice in CoreResearch@Duke, locate the Invoice ID and copy (Ctrl C) or write down the number.

2. Access CoreResearch@Duke.

3. From the ‘Manage Invoice’ Tramline, click on the ‘Manage Invoices’ tramstop.

4. Once on the ‘Manage Invoices’ list page, there are a number of activities that can be executed to display desired invoices.
5. Click on the ‘Historical Tab’ and either paste (Ctrl V) enter to Invoice ID from SAP R/3 and click ‘OK’.

6. Check the box next to the Invoice ID and click ‘Preview Invoice’.

7. The invoice will be displayed.
Reservation Queries

1. Access CoreResearch@Duke.
2. From the ‘Resource Reservation’ Tramline, click on the desired Tramstop.

Reservations Pending Approval

The ‘Reservation Pending Approval’ tab contains Reservations awaiting the core’s approval.

Click on any of the Reservations tramstop to review the desired status

This tab contains all reservations that are pending approval from the core.

Execute queries
Manage Reservations

The Manage Reservations page displays approved reservations.

Reservation History

This page displays cancelled and completed reservations.
Reservation Calendar

This tab contains current, historical, and future reservations.

This tab contains historical, current, and future reservations.

Select the desired time period.

Reservations will display on calendar.
Additional Information:

Additional training information can be found under the System Guide tramline.

1. Click the View tramstop to retrieve training material

<table>
<thead>
<tr>
<th>System Guide Type</th>
<th>System Guide Name</th>
<th>System Guide Type</th>
<th>Summary</th>
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<tbody>
<tr>
<td>FAQ</td>
<td>General FAQ and Common Issues</td>
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<tbody>
<tr>
<td>How-To</td>
<td>How to Create a Service Request</td>
<td>How-To</td>
<td>This how-to details the steps necessary to create a new service request in the CoreResearch@Duke application.</td>
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<tr>
<td></td>
<td>How to Create an EForm Service Request</td>
<td>How-To</td>
<td>How to Create an EForm Service Request</td>
</tr>
<tr>
<td></td>
<td>How to View an Existing Service Request</td>
<td>How-To</td>
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<td></td>
<td>How to Edit an Existing Service Request</td>
<td>How-To</td>
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</tr>
<tr>
<td></td>
<td>How To Cancel a Service Request as a Requestor</td>
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Support

For additional assistance, please contact the Duke Medicine Service Desk at (919) 684-2243, or within ServiceNow at https://duke.service-now.com/, select Self-Service in the left navigation bar; click the Service Catalog link to access the Can We Help You?