

DUKE MEDICINE



CoreResearch@Duke Shared Resources Training Guide

For Principal Investigators, Principal Investigator-Delegates, Financial Managers, and Financial Administrators.

5/14/15
Version 1.8

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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:

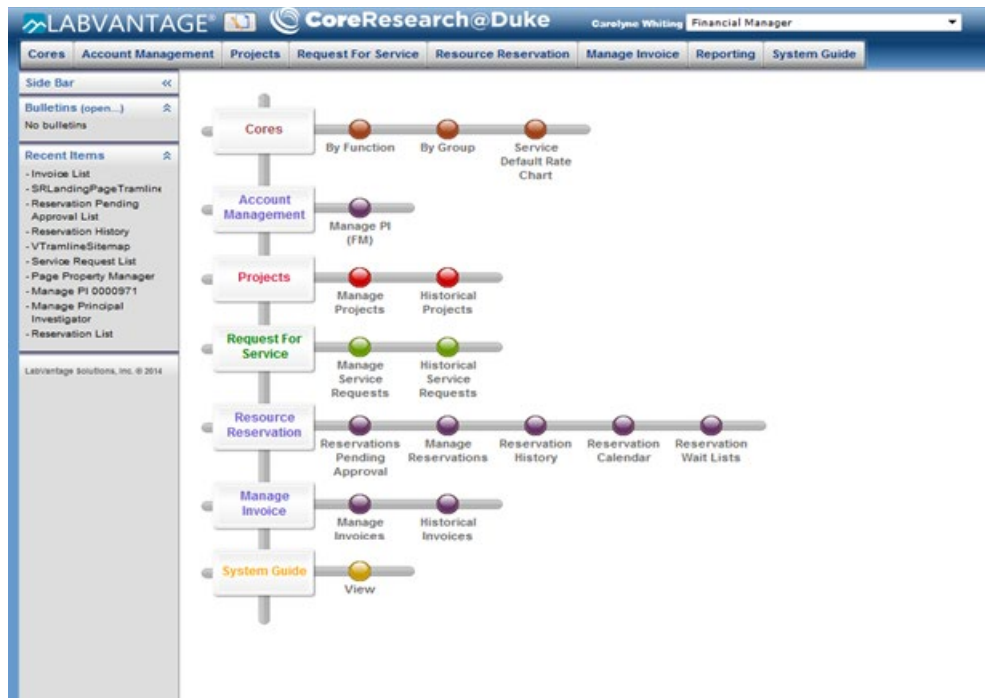
- Internet Explorer
- Chrome
- Safari
- Firefox is *NOT* supported.

Pop Up Blockers *MUST* be disabled for this site.

Navigation

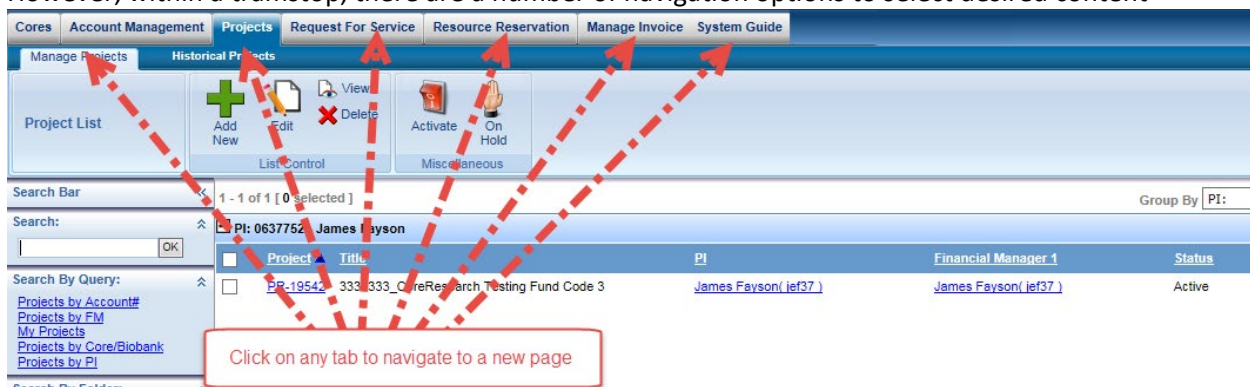
Site Map

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

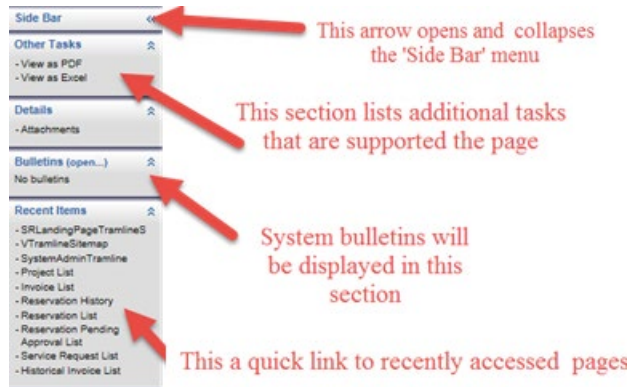
At the top right corner of each page, you will find control icon that provide additional navigation, setting, and content features.



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.

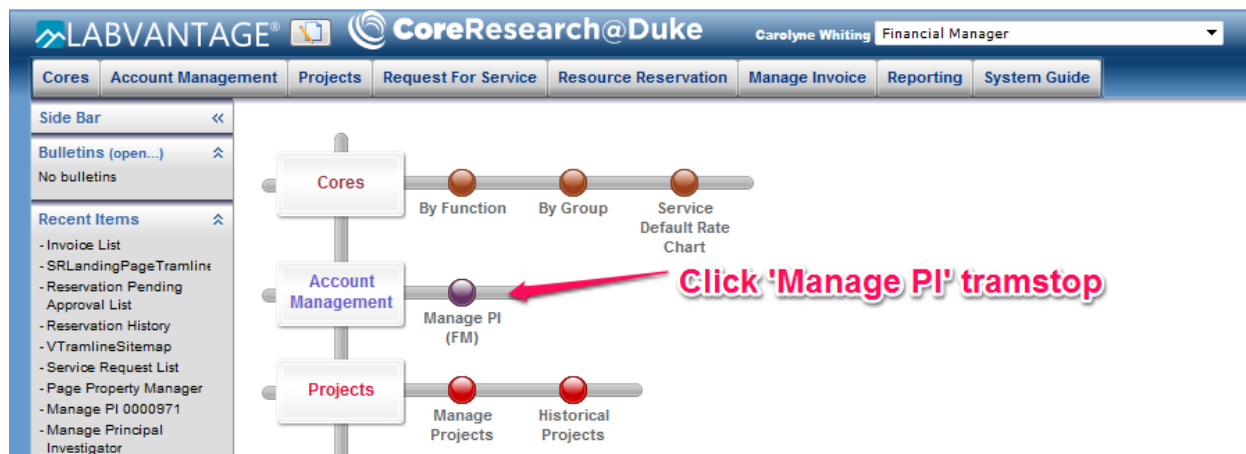
Side Bar Menu

The 'Side Bar' menu offers additional control and navigation features.

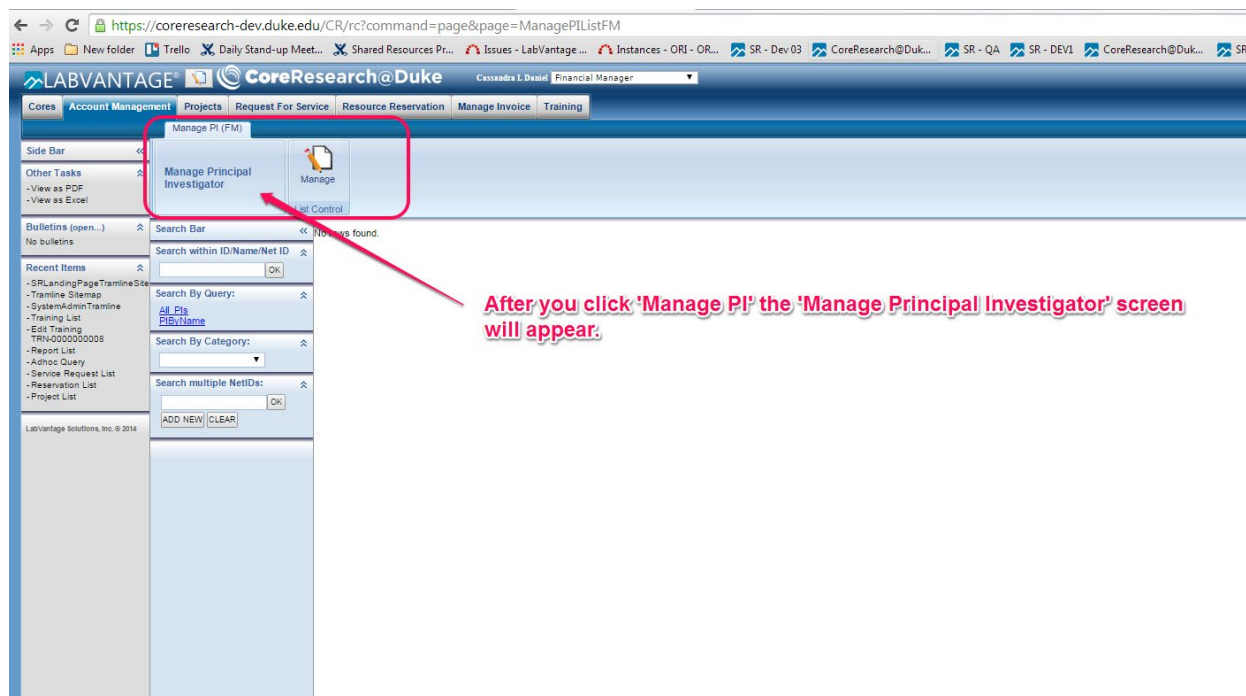


Adding a Facility User – Linking Facility User to a PI (STEP 1 of Linking Process)

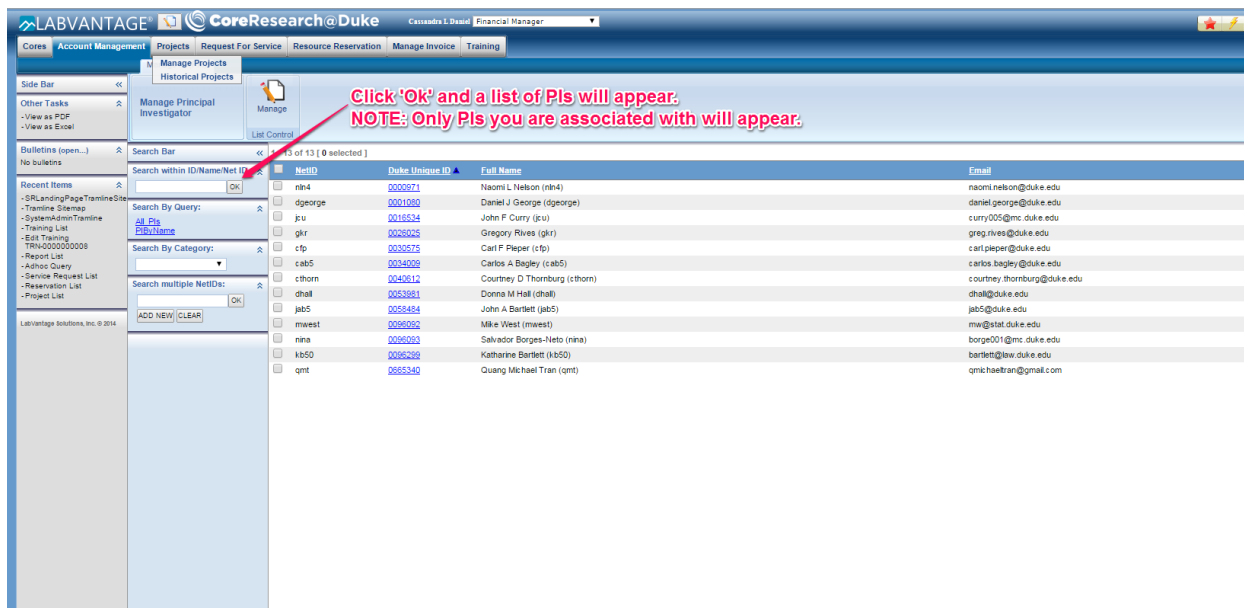
1. Access CoreResearch@Duke
2. From the 'Account Management' Tramline, click 'Manage PI' Tramstop.



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.

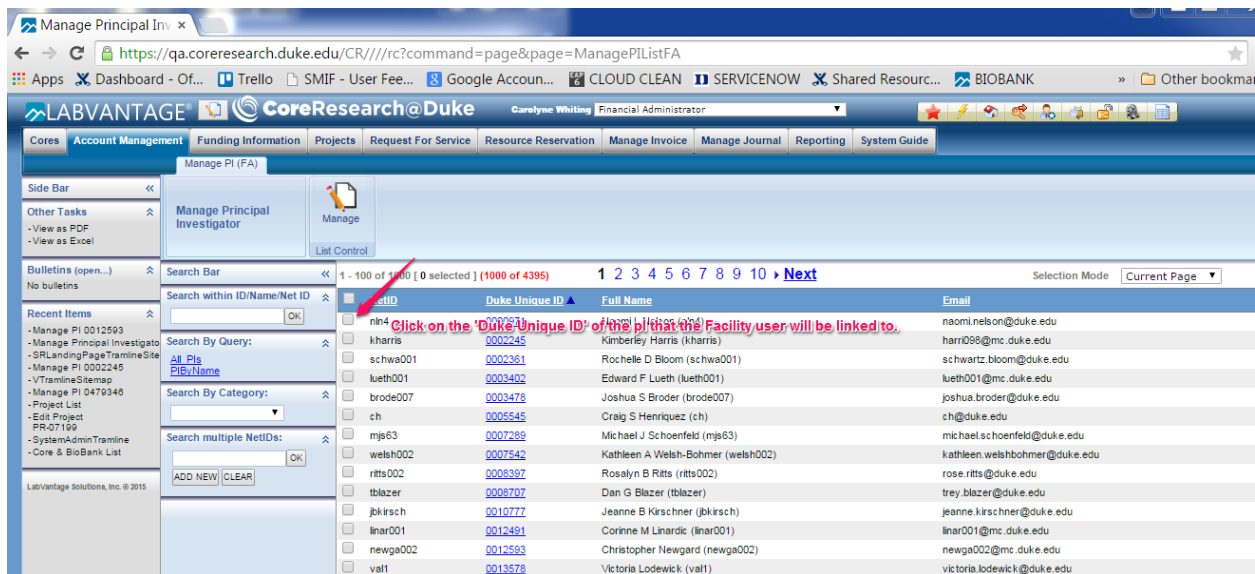


Click 'OK' and a list of PIs will appear.
NOTE: Only PIs you are associated with will appear.

NetID	Duke Unique ID	Full Name	Email
nin4	0000071	Naomi L. Nelson (nin4)	naomi.nelson@duke.edu
dgeorge	0001080	Daniel J. George (dgeorge)	daniel.george@duke.edu
jcu	0016534	John F. Curry (jcu)	curry005@mc.duke.edu
gkr	0026025	Gregory Rives (gkr)	greg.rives@duke.edu
clp	0030575	Carl F. Pieper (clp)	carl.pieper@duke.edu
cab5	0034009	Carlos A. Bagley (cab5)	carlos.bagley@duke.edu
cthorn	0040612	Courtney D. Thornburg (cthorn)	courtney.thornburg@duke.edu
chall	0053081	Donna M. Hall (chall)	chall@duke.edu
jab5	0055484	John A. Bartlett (jab5)	jab5@duke.edu
mwest	0060092	Mike West (mwest)	mwest@stat.duke.edu
nina	0060093	Salvador Borges-Nieto (nina)	borges001@mc.duke.edu
kb50	0065429	Katherine Bartlett (kb50)	bartlett@lew.duke.edu
qmt	0065340	Quang Michael Tran (qmt)	qmichaeltran@gmail.com

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

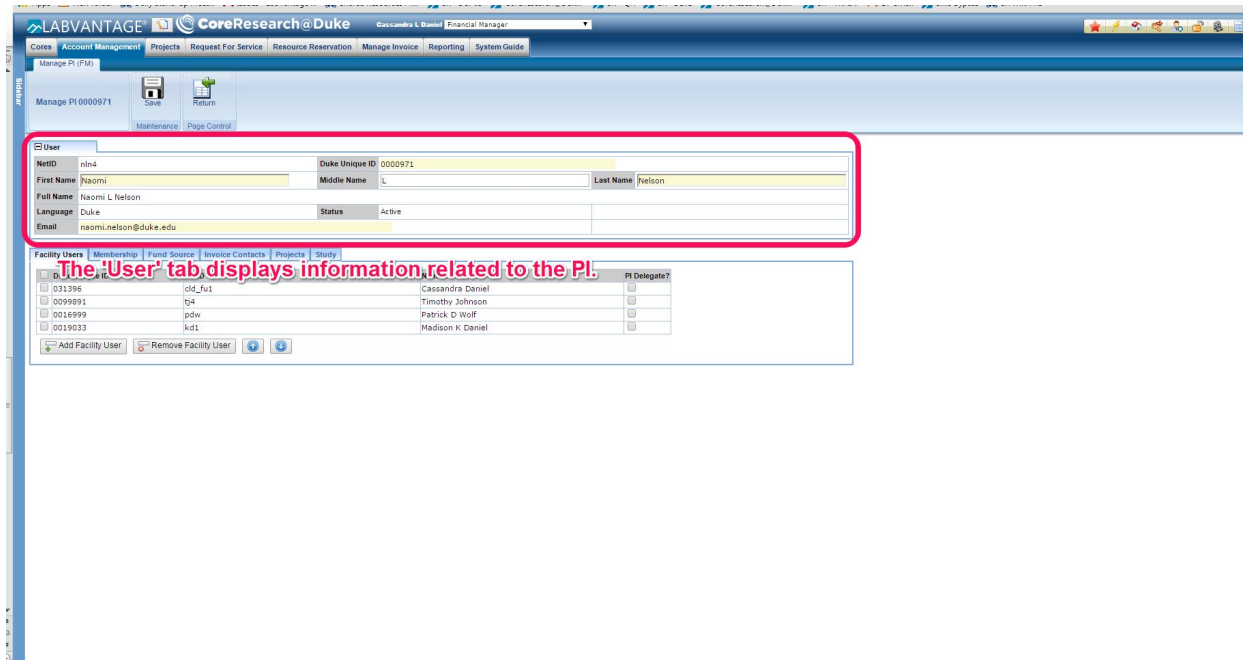
NOTE: You will only be able to manage one PI at a time.



Click on the 'Duke Unique ID' of the PI that the Facility user will be linked to.

NetID	Duke Unique ID	Full Name	Email
nin4	0000071	Naomi L. Nelson (nin4)	naomi.nelson@duke.edu
kharris	0002245	Kimberley Harris (kharris)	harris096@mc.duke.edu
schwa001	0002361	Rochelle D. Bloom (schwa001)	schwartz.bloom@duke.edu
lueth001	0003402	Edward F. Lueth (lueth001)	lueth001@mc.duke.edu
brode007	0003478	Joshua S. Broder (brode007)	joshua.broder@duke.edu
ch	0005545	Craig S. Henriquez (ch)	ch@duke.edu
mja63	0007289	Michael J. Schoenfeld (mja63)	michael.schoenfeld@duke.edu
welsh002	0007542	Kathleen A. Welsh-Bohmer (welsh002)	kathleen.welshbohmer@duke.edu
ritts002	0008397	Rosalyn B. Ritts (ritts002)	rose.ritts@duke.edu
tblazer	0008707	Dan G. Blazer (tblazer)	trey.blazer@duke.edu
jbkirsch	0010777	Jeanne B. Kirschner (jbkirsch)	jeanne.kirschner@duke.edu
linar001	0012491	Corinne M. Linardic (linar001)	linar001@mc.duke.edu
newga002	0012593	Christopher Newgard (newga002)	newga002@mc.duke.edu
val1	0013578	Victoria Lodewick (val1)	victoria.lodewick@duke.edu

NOTE: Once you select the 'Duke Unique ID', the 'Manage PI' page will be displayed. The top tab displays information about the PI.



LABVANTAGE CoreResearch@Duke Cassandra L. Daniel Financial Manager

Manage PI (FIM)

Manage PI 0000971

Save Return

Maintenance Page Control

User

NetID: nln4 Duke Unique ID: 0000971

First Name: Naomi Middle Name: L Last Name: Nelson

Full Name: Naomi L. Nelson

Language: Duke Status: Active

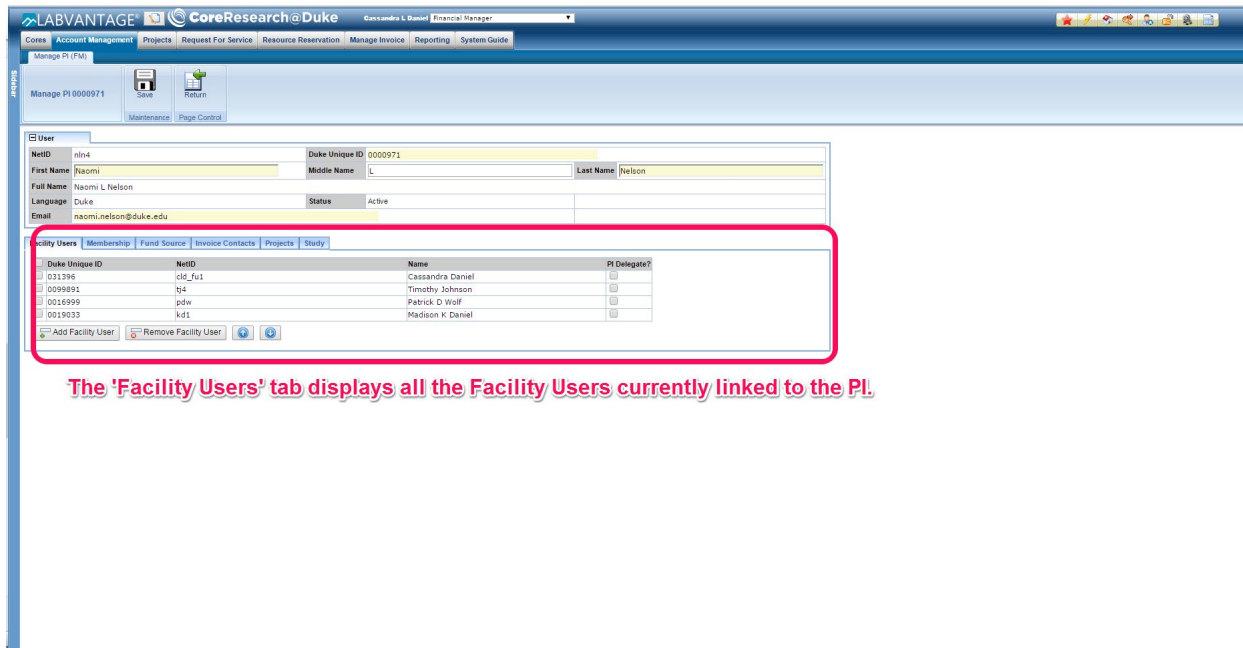
Email: naomi.nelson@duke.edu

Facility Users | Membership | Fund Source | Invoice Contacts | Projects | Study

Duke Unique ID	NetID	Name	PI Delegate?
031396	cld_fu1	Cassandra Daniel	<input type="checkbox"/>
0098891	tg4	Timothy Johnson	<input type="checkbox"/>
0016999	pdw	Patrick D Wolf	<input type="checkbox"/>
0019033	kd1	Madison K Daniel	<input type="checkbox"/>

Add Facility User Remove Facility User

NOTE: The bottom tab displays all the current Facility Users associated with the PI on the 'Manage PI' page.



LABVANTAGE CoreResearch@Duke Cassandra L. Daniel Financial Manager

Manage PI (FIM)

Manage PI 0000971

Save Return

Maintenance Page Control

User

NetID: nln4 Duke Unique ID: 0000971

First Name: Naomi Middle Name: L Last Name: Nelson

Full Name: Naomi L. Nelson

Language: Duke Status: Active

Email: naomi.nelson@duke.edu

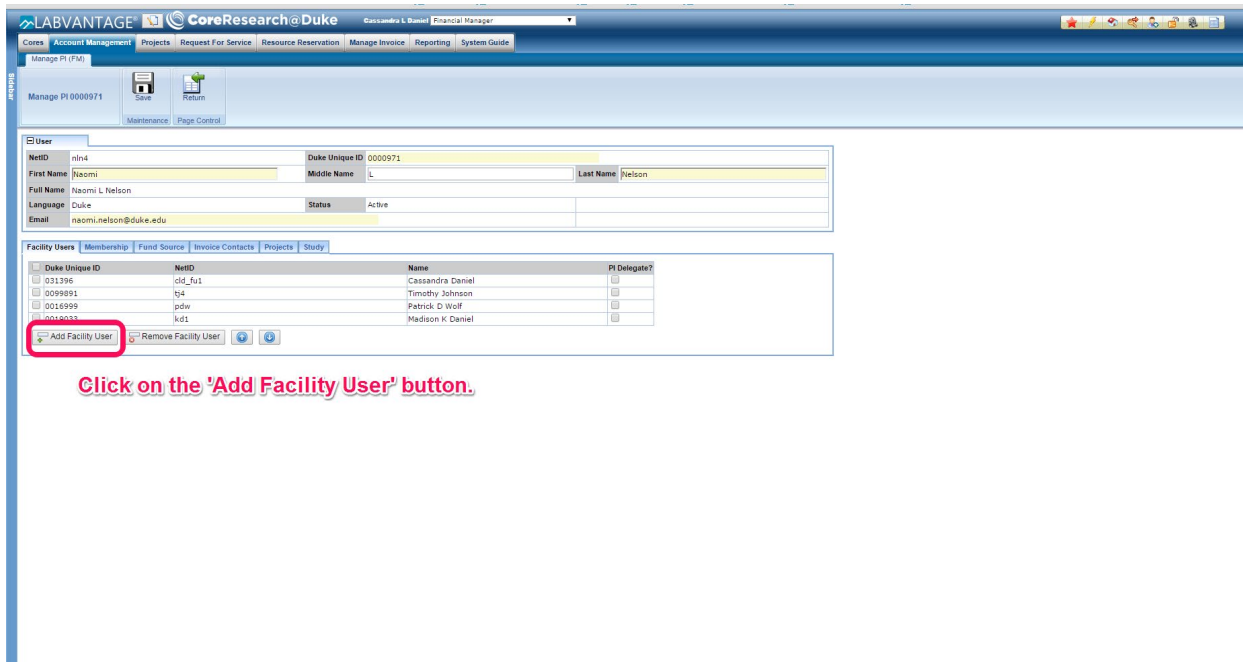
Facility Users | Membership | Fund Source | Invoice Contacts | Projects | Study

Duke Unique ID	NetID	Name	PI Delegate?
031396	cld_fu1	Cassandra Daniel	<input type="checkbox"/>
0098891	tg4	Timothy Johnson	<input type="checkbox"/>
0016999	pdw	Patrick D Wolf	<input type="checkbox"/>
0019033	kd1	Madison K Daniel	<input type="checkbox"/>

Add Facility User Remove Facility User

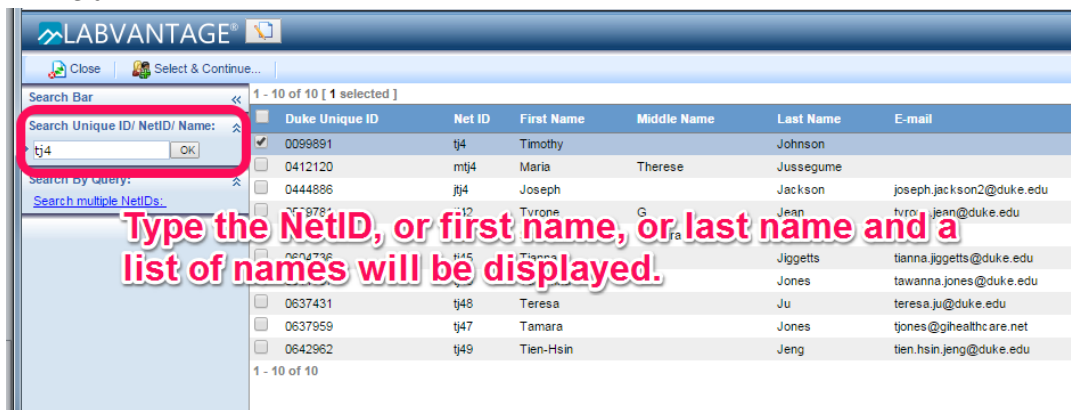
The 'Facility Users' tab displays all the Facility Users currently linked to the PI.

6. Click on the 'Add Facility User' button.



The screenshot shows the LABVANTAGE CoreResearch@Duke interface. The 'Add Facility User' button is highlighted with a red box. Below the button, a red text overlay reads: "Click on the 'Add Facility User' button."

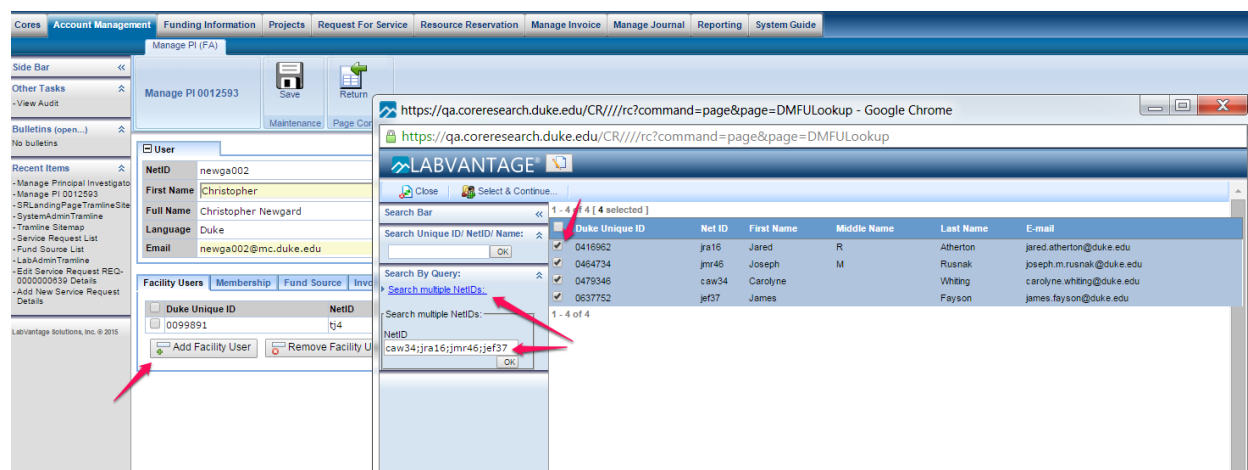
7. Type the NetID - OR - the First Name - OR - the Last Name in the 'Search Unique ID/NetID Name' field.



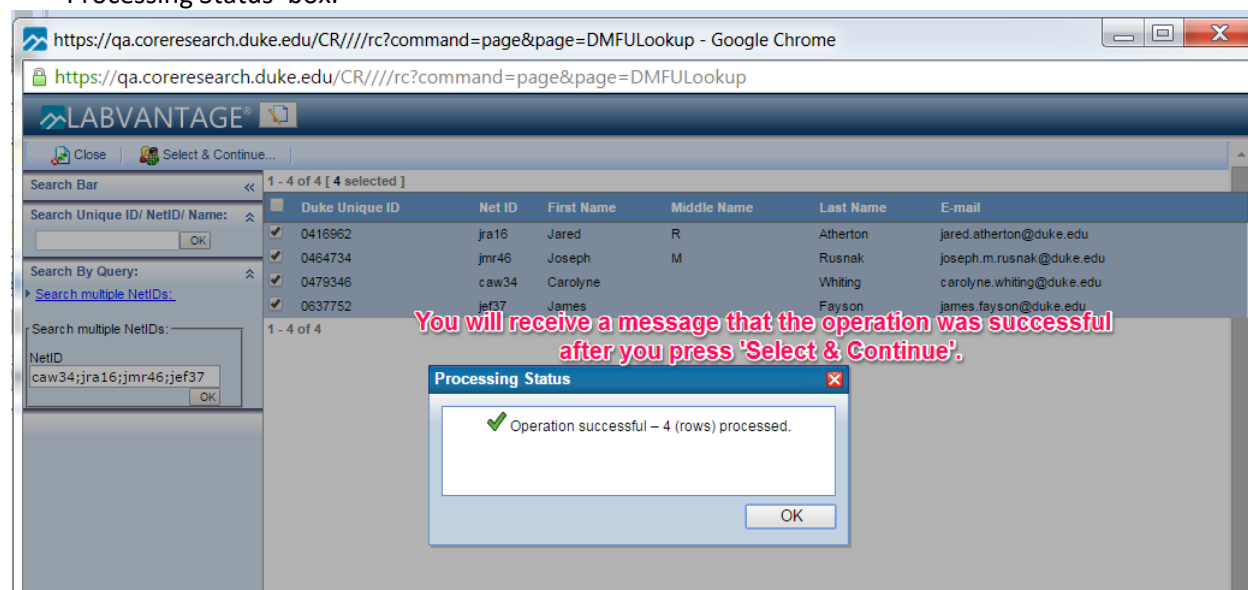
The screenshot shows the LABVANTAGE search results. The search field is highlighted with a red box. Below the search field, a red text overlay reads: "Type the NetID, or first name, or last name and a list of names will be displayed."

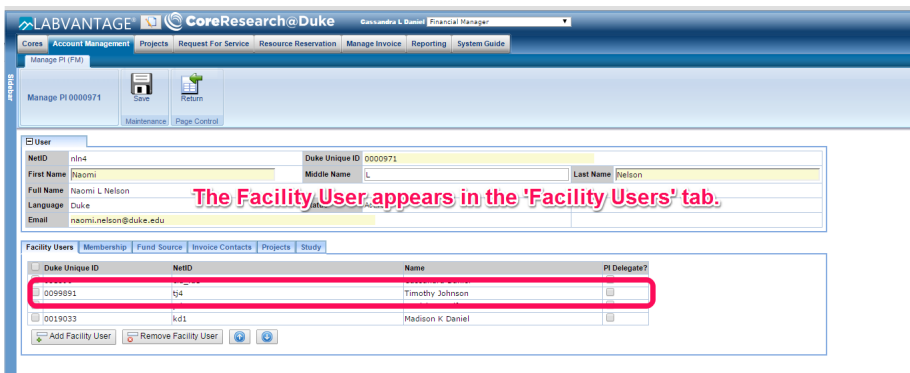
Duke Unique ID	Net ID	First Name	Middle Name	Last Name	E-mail
<input checked="" type="checkbox"/> 0099891	tj4	Timothy		Johnson	
<input type="checkbox"/> 0412120	mtj4	Maria	Therese	Jussegume	
<input type="checkbox"/> 0444886	jtj4	Joseph		Jackson	joseph.jackson2@duke.edu
<input type="checkbox"/> 0509781	tyrone	Tyrone	G	Jean	tyron_jean@duke.edu
<input type="checkbox"/> 0637431	tj48	Teresa		Ju	teresa.ju@duke.edu
<input type="checkbox"/> 0637959	tj47	Tamara		Jones	tjones@ghhealthcare.net
<input type="checkbox"/> 0642962	tj49	Tien-Hsin		Jeng	tien.hsin.jeng@duke.edu

- 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.



- You will receive a message confirming the 'Operation was Successful' and Click on 'OK' in the 'Processing Status' box.

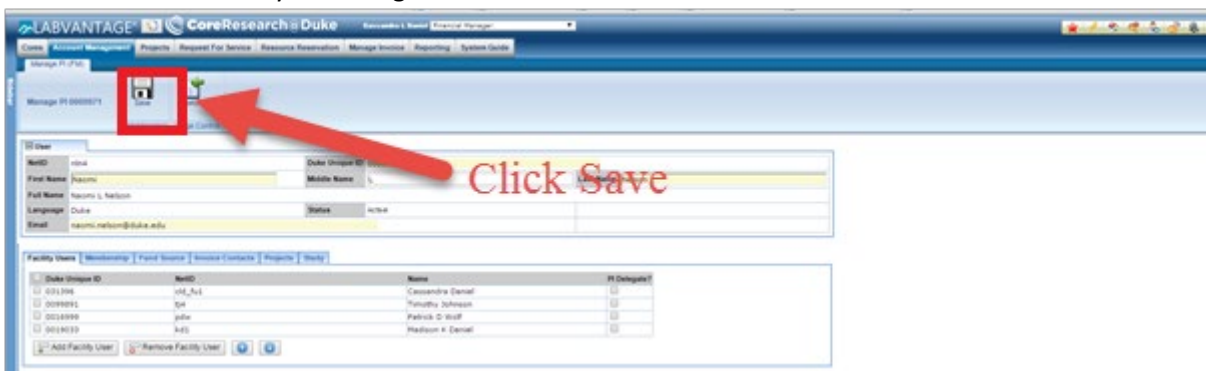




The Facility User appears in the 'Facility Users' tab.

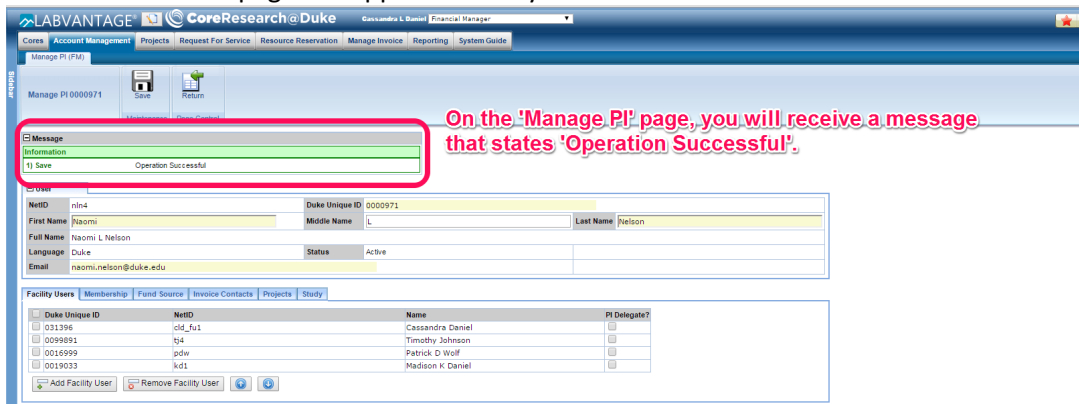
Duke Unique ID	NetID	Name	PI Delegate?
0009971	nln4	Naomi L. Nelson	<input type="checkbox"/>
0009991	ts4	Timothy Johnson	<input type="checkbox"/>
0019033	kdt	Madison K. Daniel	<input type="checkbox"/>

11. Click 'Save' to store your changes.



Click Save

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



On the 'Manage PI' page, you will receive a message that states 'Operation Successful'.

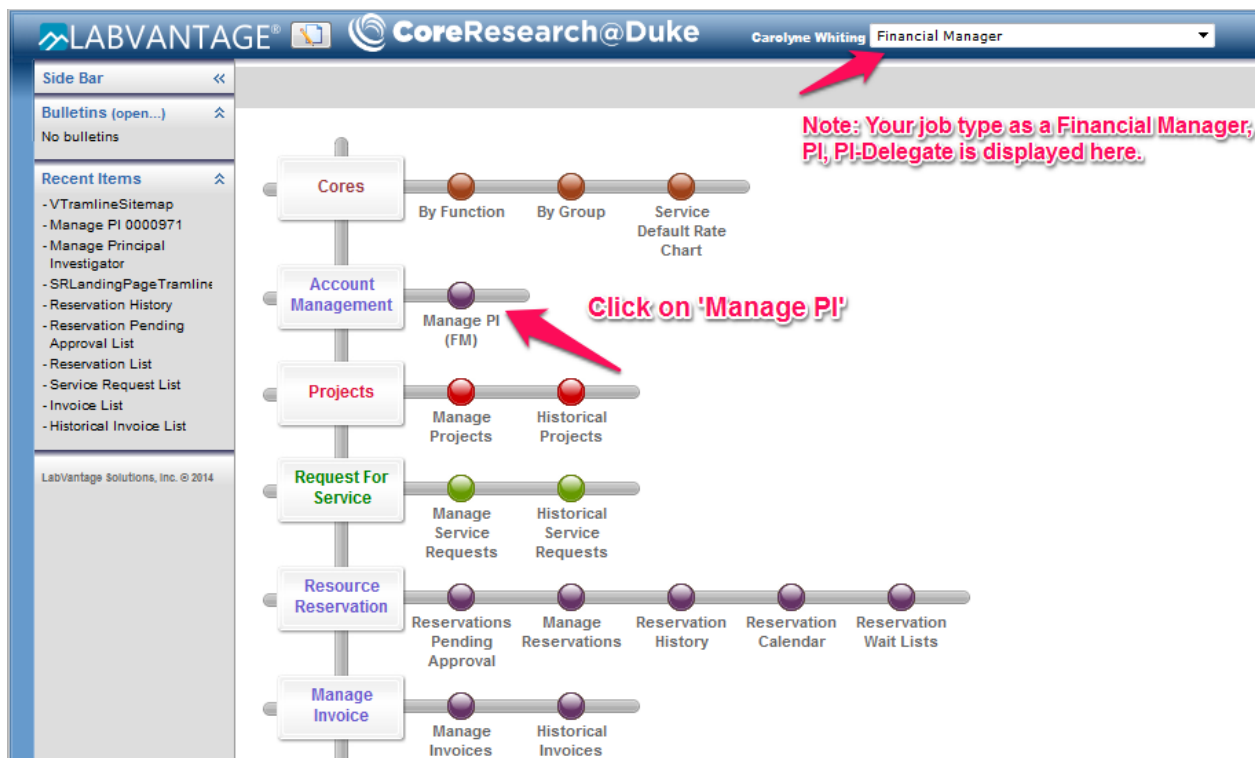
Duke Unique ID	NetID	Name	PI Delegate?
001396	cd_fu1	Cassandra Daniel	<input type="checkbox"/>
0009991	ts4	Timothy Johnson	<input type="checkbox"/>
0016999	pdw	Patrick D. Wolf	<input type="checkbox"/>
0019033	kdt	Madison K. Daniel	<input type="checkbox"/>

This Operation has accomplished three actions:

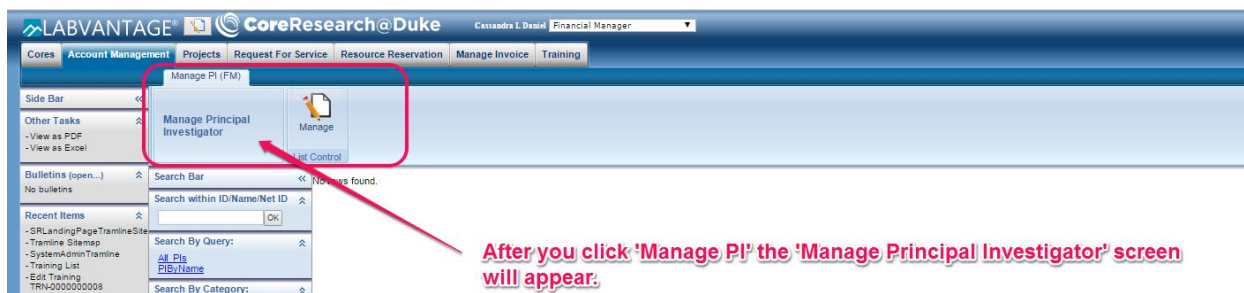
- The Facility User account has been created
- A job type of Facility User has been assigned to the user.
- The Facility User has been linked to the Principal Investigator (PI).

Assigning a Principal Investigator-Delegate

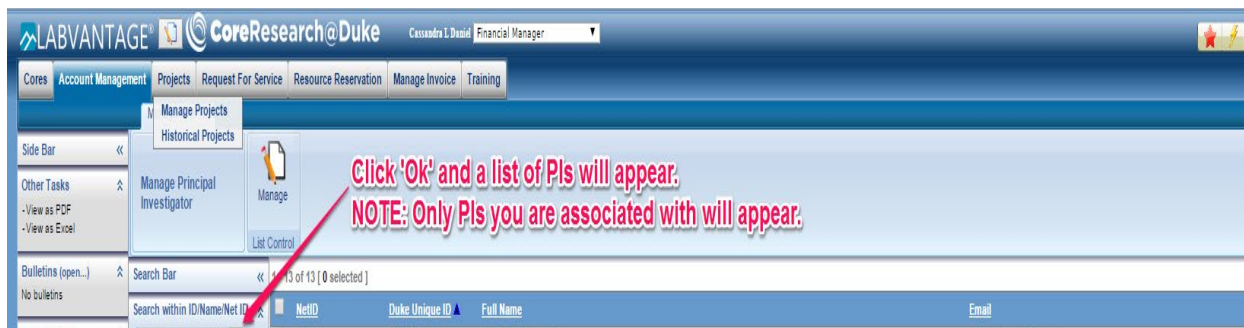
1. Access CoreResearch@Duke
2. From the 'Account Management' Tramline, click 'Manage PI' Tramstop.



3. The 'Manage Principal Investigator' page will be displayed.

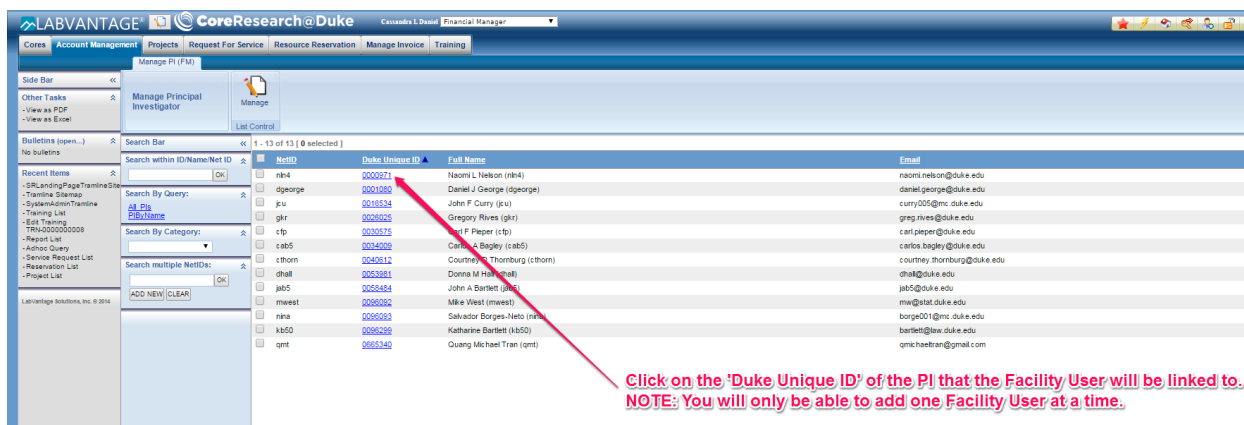


- Click 'OK' and a list of PIs will be displayed who share your fund code.

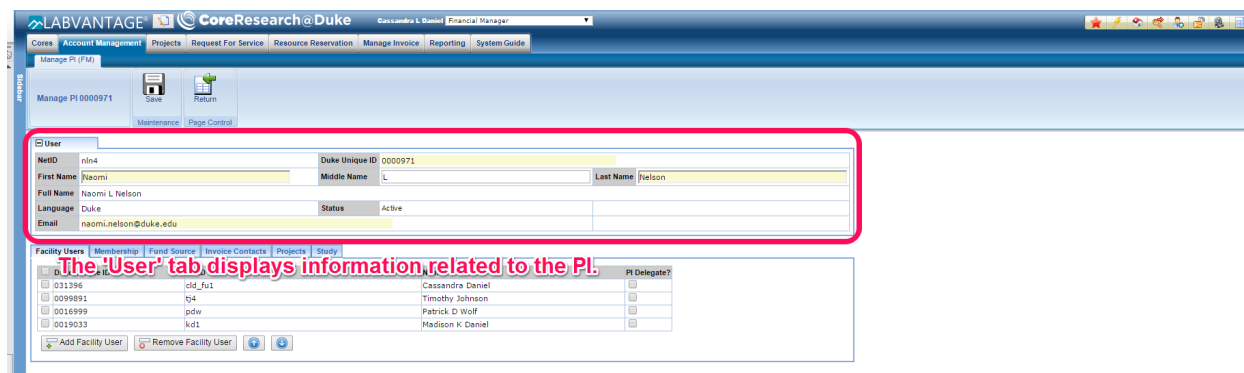


- To select a PI to manage, click on the 'Duke Unique ID'.

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.



6. Select one or more individuals to become PI-delegates

Manage PI 0000971
Save *
Return

Maintenance
Page Control

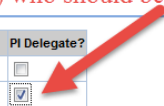
User

NetID	nl4	Duke Unique ID	0000971		
First Name	Naomi	Middle Name	L	Last Name	Nelson
Full Name	Naomi L Nelson				
Language	Duke	Status	Active		
Email	naomi.nelson@duke.edu				

Facility Users
Membership
Fund Source
Invoice Contacts
Projects
Study

<input type="checkbox"/>	Duke Unique ID	NetID	Name	PI Delegate?
<input type="checkbox"/>	031396	cld_fu1	Cassandra Daniel	<input type="checkbox"/>
<input type="checkbox"/>	0099891	tj4	Timothy Johnson	<input checked="" type="checkbox"/>
<input type="checkbox"/>	0016999	pdw	Patrick D Wolf	<input type="checkbox"/>
<input type="checkbox"/>	0019033	kd1	Madison K Daniel	<input type="checkbox"/>

Select the person(s) who should be the PI-delegate



Add Facility User (non DataMart)
 Add Facility User
 Remove Facility User

7. Once the operation has been saved, a message will displayed confirming Operation Successful.

Manage PI 0000971
Save
Return

Maintenance
Page Control

Message

Information

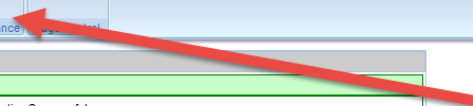
1) Save Operation Successful

User

NetID	nl4	Duke Unique ID	0000971		
First Name	Naomi	Middle Name	L	Last Name	Nelson
Full Name	Naomi L Nelson				
Language	Duke	Status	Active		
Email	naomi.nelson@duke.edu				

Facility Users
Membership
Fund Source
Invoice Contacts
Projects
Study

<input type="checkbox"/>	Duke Unique ID	NetID	Name	PI Delegate?
<input type="checkbox"/>	031396	cld_fu1	Cassandra Daniel	<input type="checkbox"/>
<input type="checkbox"/>	0099891	tj4	Timothy Johnson	<input checked="" type="checkbox"/>
<input type="checkbox"/>	0016999	pdw	Patrick D Wolf	<input type="checkbox"/>
<input type="checkbox"/>	0019033	kd1	Madison K Daniel	<input type="checkbox"/>

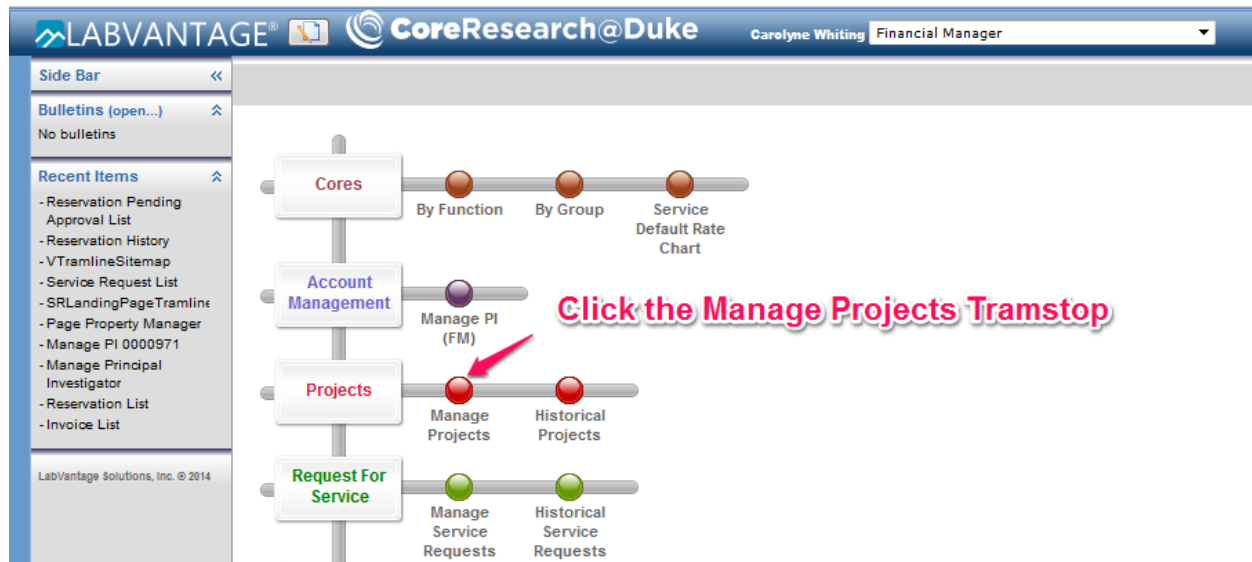


Click Save to keep your modifications

Add Facility User (non DataMart)
 Add Facility User
 Remove Facility User

Assigning Facility Users as Members of a Project (STEP 2 of Linking Process)

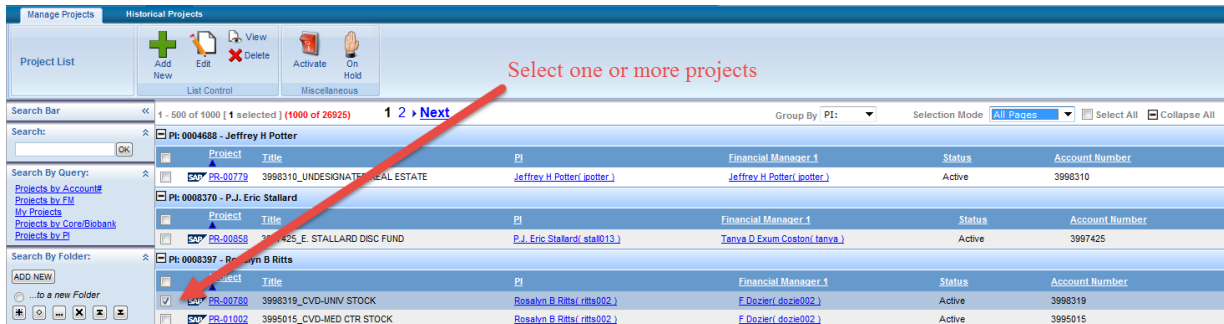
1. LOGIN to CoreResearch@Duke.
2. The Tramline page will display.
3. From the 'Projects' tramline, click 'Manage Projects' tramstop



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 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'.



Manage Projects | Historical Projects

Project List | Add New | Edit | Delete | View | Activate | On Hold | Miscellaneous

Search Bar: 1 - 500 of 1000 [1 selected] (1000 of 26925) 1 2 > Next

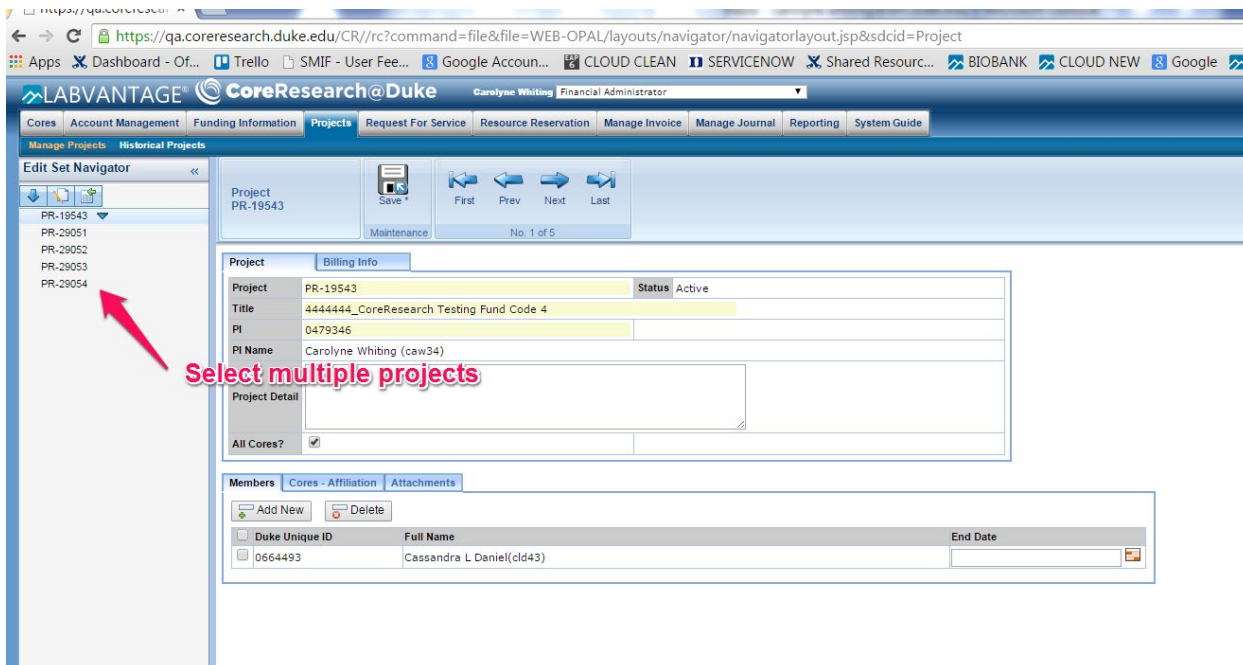
Search: [Search Box] OK

Search By Query: Projects by Account#, Projects by PI, My Projects, Projects by Core/BioBank, Projects by PI

Search By Folder: ADD NEW, ...to a new Folder

Project	Title	PI	Financial Manager	Status	Account Number
Pt: 0004688 - Jeffrey H Potter					
PR-00779	3998310_UNDESIGNATED REAL ESTATE	Jeffrey H Potter (potter)	Jeffrey H Potter (potter)	Active	3998310
Pt: 0008370 - P.J. Eric Stallard					
PR-00858	3998310_STALLARD DISC FUND	P.J. Eric Stallard (stall013)	Tanya D Exum Costant (tanva)	Active	3997425
Pt: 0008397 - Rosalyn B Ritts					
PR-00780	3998319_CVD-UNIV STOCK	Rosalyn B Ritts (ritts002)	F Dozier (dozie002)	Active	3998319
PR-01002	3995015_CVD-MED CTR STOCK	Rosalyn B Ritts (ritts002)	F Dozier (dozie002)	Active	3995015

NOTE: The view below is the multiple view screen.



LABVANTAGE® CoreResearch@Duke

Caroline Whiting | Financial Administrator

Cores | Account Management | Funding Information | Projects | Request For Service | Resource Reservation | Manage Invoice | Manage Journal | Reporting | System Guide

Manage Projects | Historical Projects

Edit Set Navigator

Project PR-19543

Save | First | Prev | Next | Last | Maintenance | No. 1 of 5

Project | Billing Info

Project: PR-19543 | Status: Active

Title: 4444444_CoreResearch Testing Fund Code 4

PI: 0479346

PI Name: Carolyn Whiting (caw34)

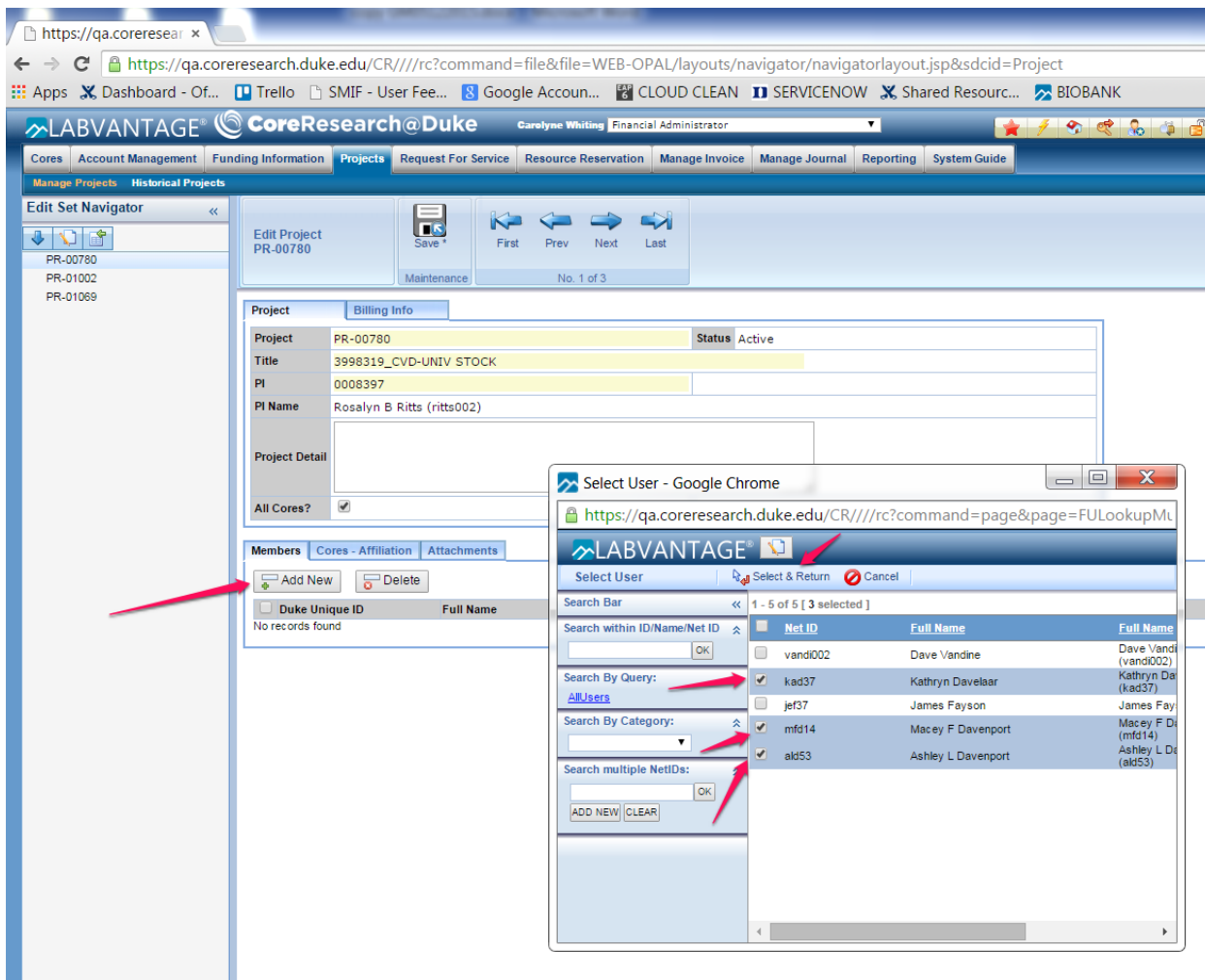
Project Detail

All Cores? ☒

Members | Cores - Affiliation | Attachments

Add New | Delete

Duke Unique ID	Full Name	End Date
0664493	Cassandra L Daniel(cld43)	



LABVANTAGE® CoreResearch@Duke

Project: PR-00780 Status: Active

Title: 3998319_CVD-UNIV STOCK

PI: 0008397

PI Name: Rosalyn B Ritts (ritts002)

Project Detail

All Cores? ☒

Members Cores - Affiliation Attachments

Add New Delete

Duke Unique ID Full Name

No records found

Select User - Google Chrome

LABVANTAGE®

Select User Select and Return Cancel

Search Bar 1 - 5 of 5 [3 selected]

Search within ID/Name/Net ID OK

Search By Query: All Users

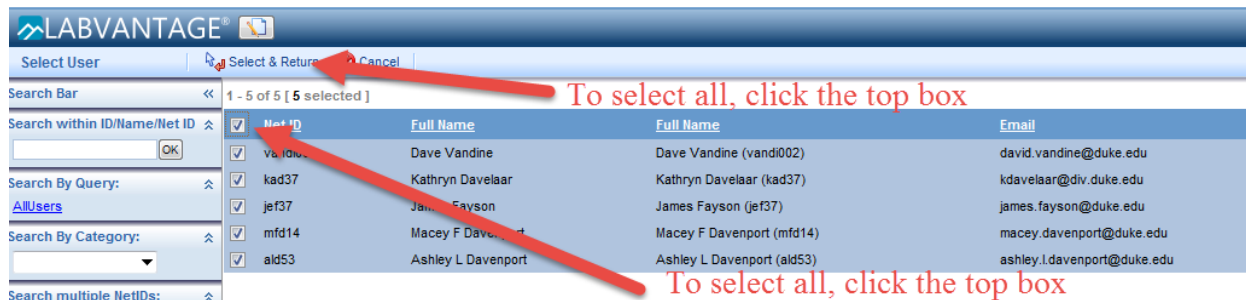
Search By Category:

Search multiple NetIDs: OK

ADD NEW CLEAR

Net ID	Full Name	Full Name
<input type="checkbox"/> vand002	Dave Vandine	Dave Vandine (vand002)
<input checked="" type="checkbox"/> kad37	Kathryn Davelaar	Kathryn Davelaar (kad37)
<input type="checkbox"/> jef37	James Fayson	James Fayson (jef37)
<input checked="" type="checkbox"/> mfd14	Macey F Davenport	Macey F Davenport (mfd14)
<input checked="" type="checkbox"/> ald53	Ashley L Davenport	Ashley L Davenport (ald53)

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.



LABVANTAGE®

Select User Select and Return Cancel

Search Bar 1 - 5 of 5 [5 selected]

Search within ID/Name/Net ID OK

Search By Query: All Users

Search By Category:

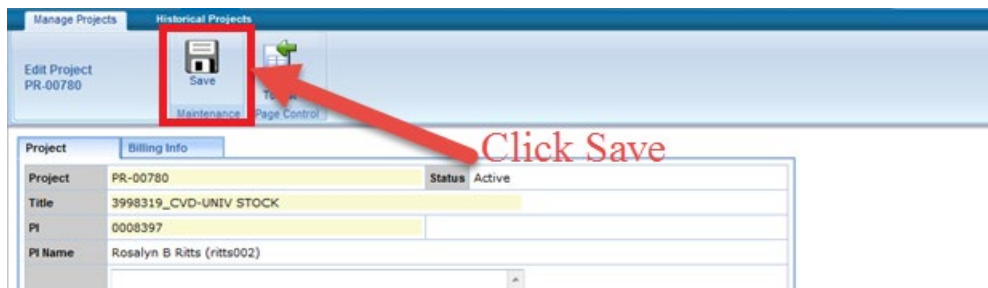
Search multiple NetIDs:

Net ID	Full Name	Full Name	Email
<input checked="" type="checkbox"/> vand002	Dave Vandine	Dave Vandine (vand002)	david.vandine@duke.edu
<input checked="" type="checkbox"/> kad37	Kathryn Davelaar	Kathryn Davelaar (kad37)	kdavelaar@div.duke.edu
<input checked="" type="checkbox"/> jef37	James Fayson	James Fayson (jef37)	james.fayson@duke.edu
<input checked="" type="checkbox"/> mfd14	Macey F Davenport	Macey F Davenport (mfd14)	macey.davenport@duke.edu
<input checked="" type="checkbox"/> ald53	Ashley L Davenport	Ashley L Davenport (ald53)	ashley.l.davenport@duke.edu

To select all, click the top box

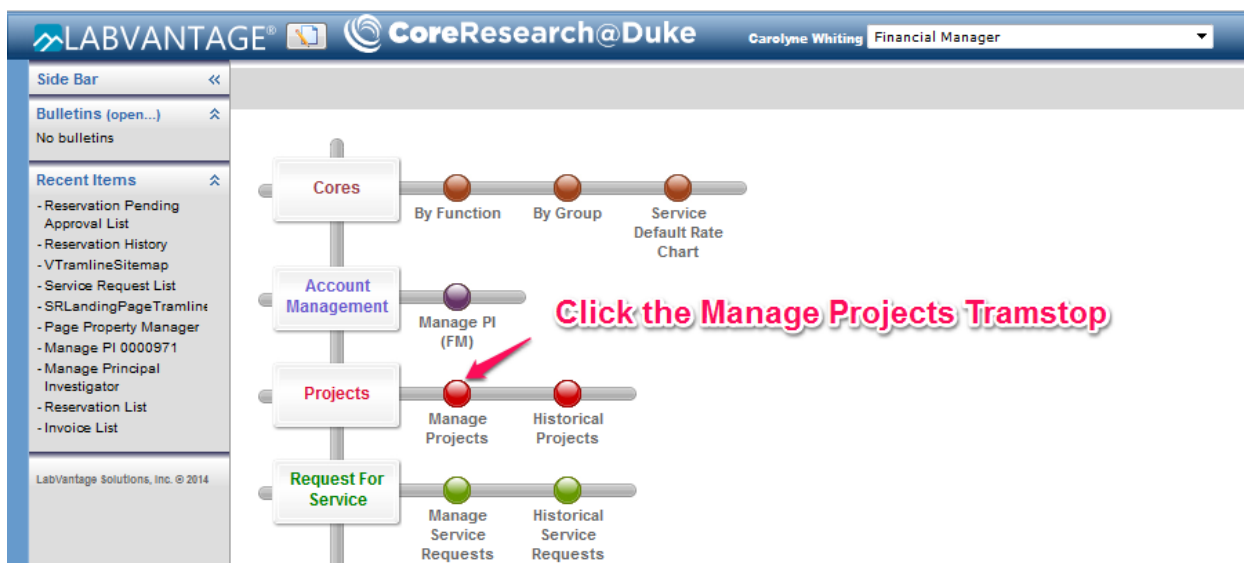
To select all, click the top box

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.



Manage Projects | Historical Projects

Project List | Add New | Edit | View | Delete | Activate | On Hold

Search Bar: 1 - 500 of 1000 (1 selected) (1000 of 26925) 1 2 > Next

Search: [Search Box] OK

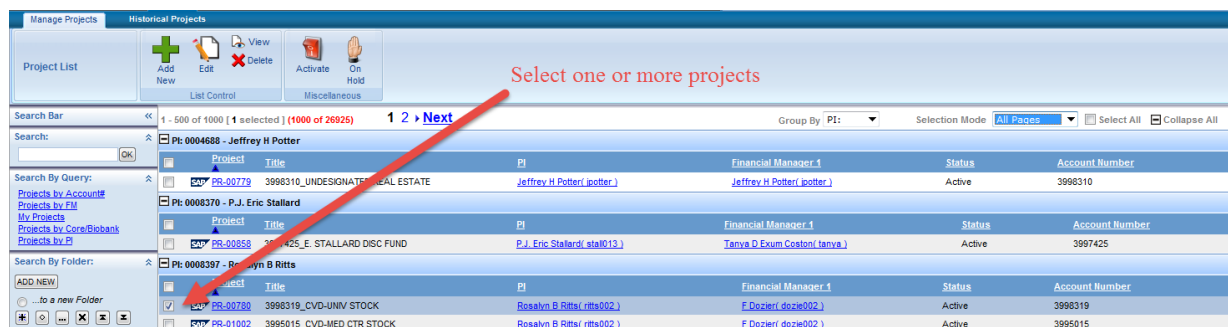
Search By Query: Projects by Account, Projects by PI, My Projects, Projects by Core/BioBank, Projects by PI

Search By Folder: ADD NEW, ...to a new Folder

Adhoc Search (New Adhoc Query)

Project	Title	PI	Financial Manager 1	Status	Account Number
Ph: 0004688 - Jeffrey H Potter					
<input checked="" type="checkbox"/> PR-00779	3998310_UNDESIGNATED REAL ESTATE	Jeffrey H Potter(j.potter)	Jeffrey H Potter(j.potter)	Active	3998310
Ph: 0008370 - P.J. Eric Stallard					
<input checked="" type="checkbox"/> PR-00858	3997425_E_STALLARD DISC FUND	P.J. Eric Stallard(stall013)	Tanya D Exum Costoni(tanya)	Active	3997425
Ph: 0008397 - Rosalyn B Ritts					
<input checked="" type="checkbox"/> PR-00780	3998319_CVD-UNIV STOCK	Rosalyn B Ritts(rits002)	F Dozier(dozie002)	Active	3998319
<input checked="" type="checkbox"/> PR-01002	3995015_CVD-MED CTR STOCK	Rosalyn B Ritts(rits002)	F Dozier(dozie002)	Active	3995015
Ph: 0010777 - Jeanne B Kirschner					
<input checked="" type="checkbox"/> PR-00391	0004590237_GSP SCIENCE SOCIETY	Jeanne B Kirschner(j.kirsch)	Melissa Segal(mds55)	Active	0004590237

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'.



Manage Projects | Historical Projects

Project List | Add New | Edit | View | Delete | Activate | On Hold

Search Bar: 1 - 500 of 1000 (1 selected) (1000 of 26925) 1 2 > Next

Search: [Search Box] OK

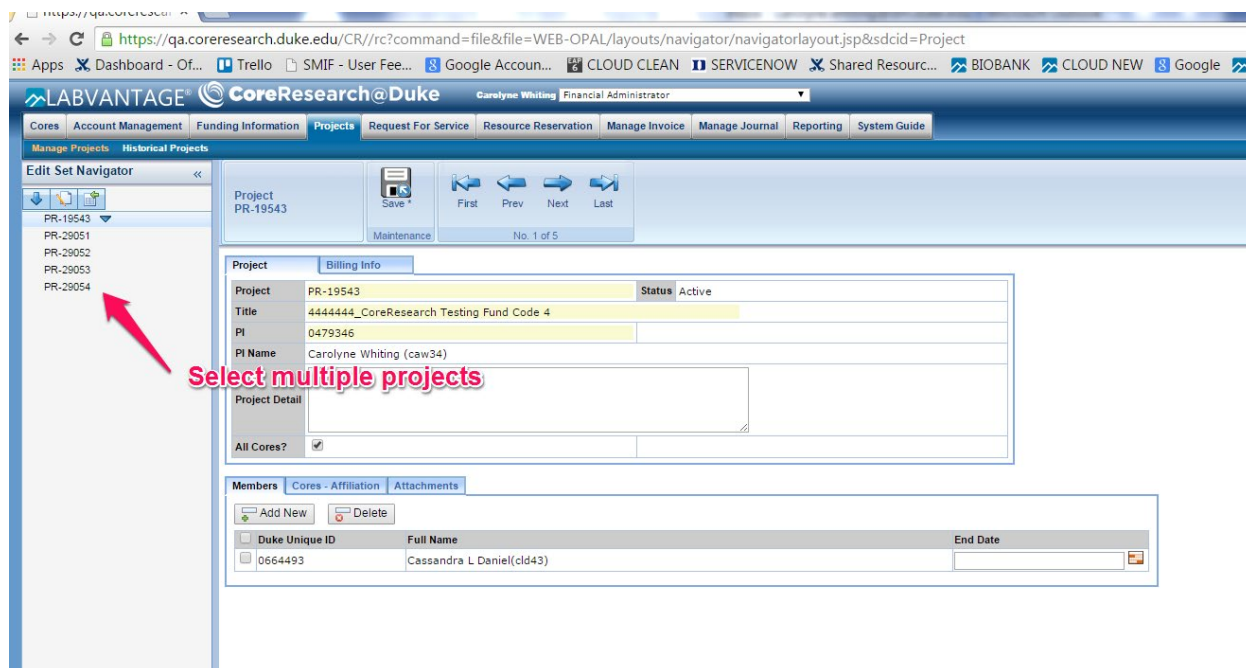
Search By Query: Projects by Account, Projects by PI, My Projects, Projects by Core/BioBank, Projects by PI

Search By Folder: ADD NEW, ...to a new Folder

Adhoc Search (New Adhoc Query)

Project	Title	PI	Financial Manager 1	Status	Account Number
Ph: 0004688 - Jeffrey H Potter					
<input checked="" type="checkbox"/> PR-00779	3998310_UNDESIGNATED REAL ESTATE	Jeffrey H Potter(j.potter)	Jeffrey H Potter(j.potter)	Active	3998310
Ph: 0008370 - P.J. Eric Stallard					
<input checked="" type="checkbox"/> PR-00858	3997425_E_STALLARD DISC FUND	P.J. Eric Stallard(stall013)	Tanya D Exum Costoni(tanya)	Active	3997425
Ph: 0008397 - Rosalyn B Ritts					
<input checked="" type="checkbox"/> PR-00780	3998319_CVD-UNIV STOCK	Rosalyn B Ritts(rits002)	F Dozier(dozie002)	Active	3998319
<input checked="" type="checkbox"/> PR-01002	3995015_CVD-MED CTR STOCK	Rosalyn B Ritts(rits002)	F Dozier(dozie002)	Active	3995015

NOTE: The view below is the multiple view screen.



LABVANTAGE CoreResearch@Duke | Carolyn Whiting | Financial Administrator

Project: PR-19543

Project Detail

Project: PR-19543 | Status: Active

Title: 4444444_CoreResearch Testing Fund Code 4

PI: 0479346

PI Name: Carolyn Whiting(caw34)

Project Detail

All Cores? ☒

Members | Cores - Affiliation | Attachments

Add New | Delete

Duke Unique ID	Full Name	End Date
0664493	Cassandra L Daniel(cld43)	

LABVANTAGE® CoreResearch@Duke Jared R Atherton Financial Administrator

Cores Account Management Funding Information **Projects** Request For Service Resource Reservation Manage Invoice Manage Journal Reporting System Guide

Manage Projects Historical Projects

Sidebar Edit Project PR-00780 Save Return To List Maintenance Page Control

Project Billing Info

Project PR-00780 Status Active

Title 3998319_CVD-UNIV STOCK

PI 0008397

PI Name Rosalyn B Ritts (ritts002)

Project Detail

All Cores? ☒

Members Cores - Affiliation Attachments

Add New Delete

<input type="checkbox"/> Duke Unique ID	Full Name	End Date
<input checked="" type="checkbox"/> 0284426	Dave Vandine(vandi002)	
<input type="checkbox"/> 0565563	Kathryn Davelaar(kad37)	
<input checked="" type="checkbox"/> 0637752	James Fayson(jef37)	
<input checked="" type="checkbox"/> 0639160	Macey F Davenport(mfd14)	
<input type="checkbox"/> 0639855	Ashley L Davenport(ald53)	

9. The selected Facility User(s) will be removed from the Members list. Click 'Save' to store the change.

LABVANTAGE® CoreResearch@Duke Jared R Atherton Financial Administrator

Cores Account Management Funding Information **Projects** Request For Service Resource Reservation Manage Invoice Manage Journal Reporting System Guide

Manage Projects Historical Projects

Sidebar Edit Project PR-00780 Save Return To List Maintenance Page Control

Project Billing Info

Project PR-00780 Status Active

Title 3998319_CVD-UNIV STOCK

PI 0008397

PI Name Rosalyn B Ritts (ritts002)

Project Detail

All Cores? ☒

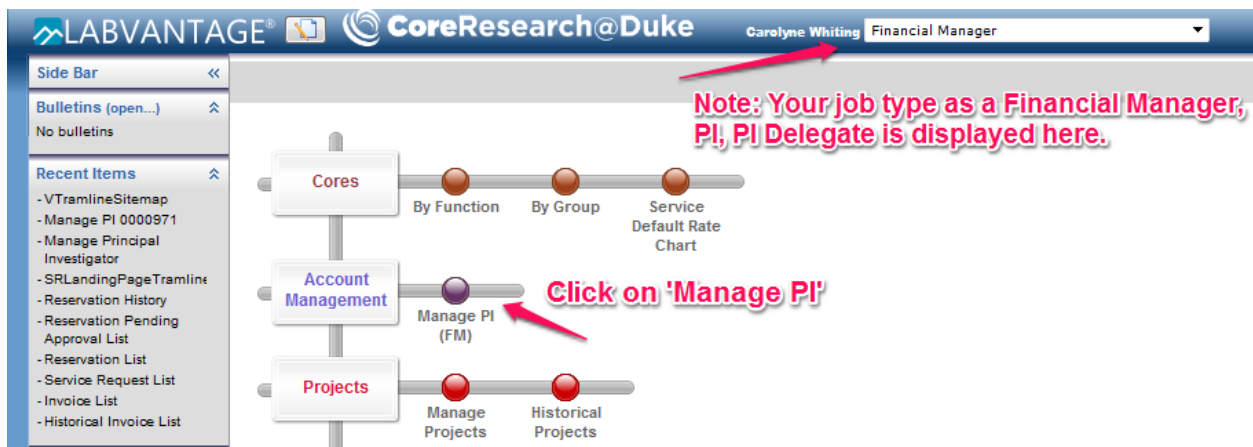
Members Cores - Affiliation Attachments

Add New Delete

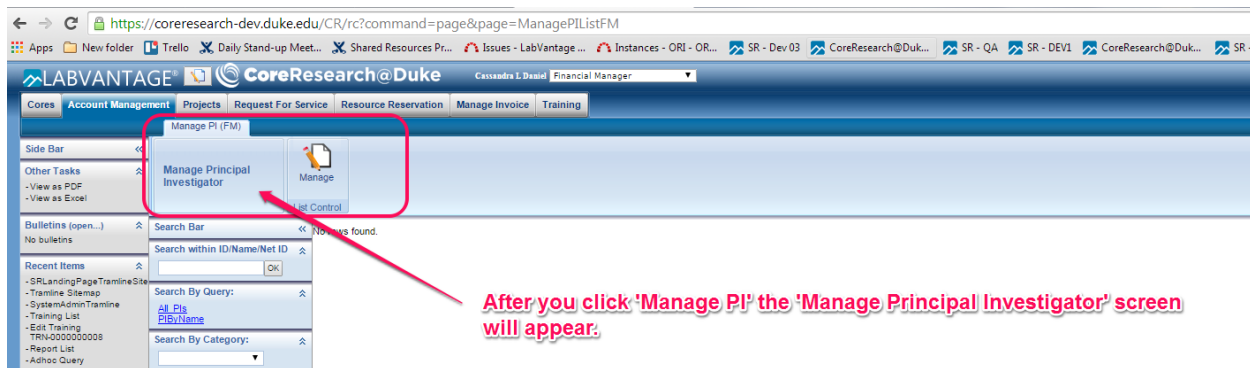
<input type="checkbox"/> Duke Unique ID	Full Name	End Date
<input type="checkbox"/> 0565563	Kathryn Davelaar(kad37)	
<input type="checkbox"/> 0639855	Ashley L Davenport(ald53)	

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.

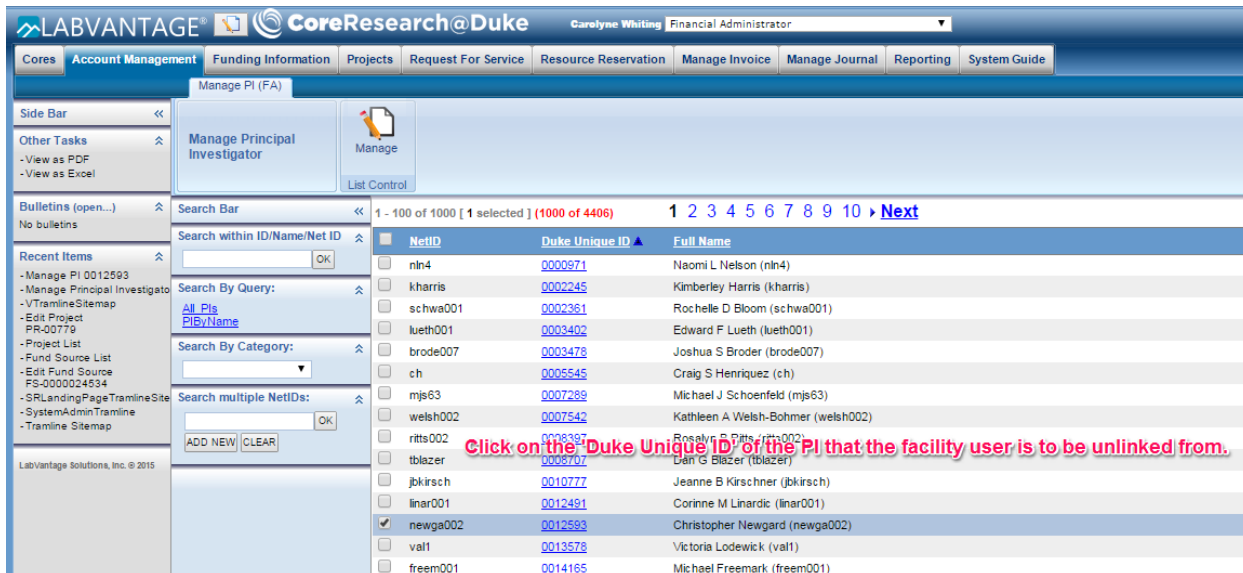


3. The 'Manage Principal Investigator' page will be displayed.



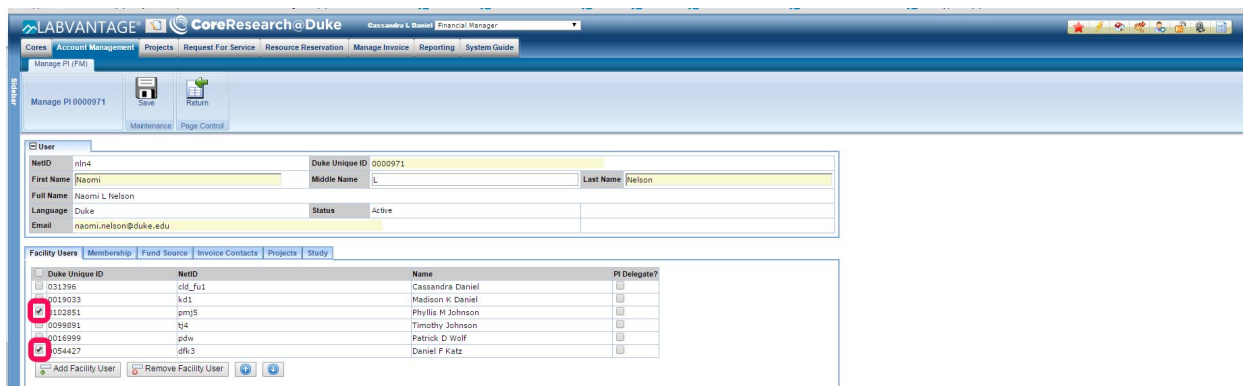
- To select a PI to manage, click on the 'Duke Unique ID'.

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

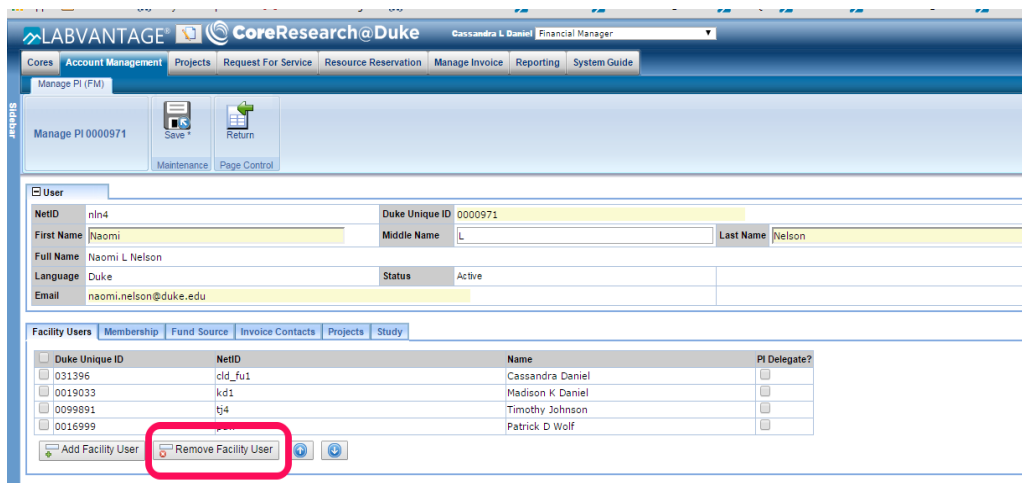


Click on the 'Duke Unique ID' of the PI that the facility user is to be unlinked from.

- Under the Facility Users Tab, select the name(s) for the user(s) you would like to remove from the PI.
- NOTE: You can remove multiple Facility Users at one time.



7. Click on 'Remove Facility User'.

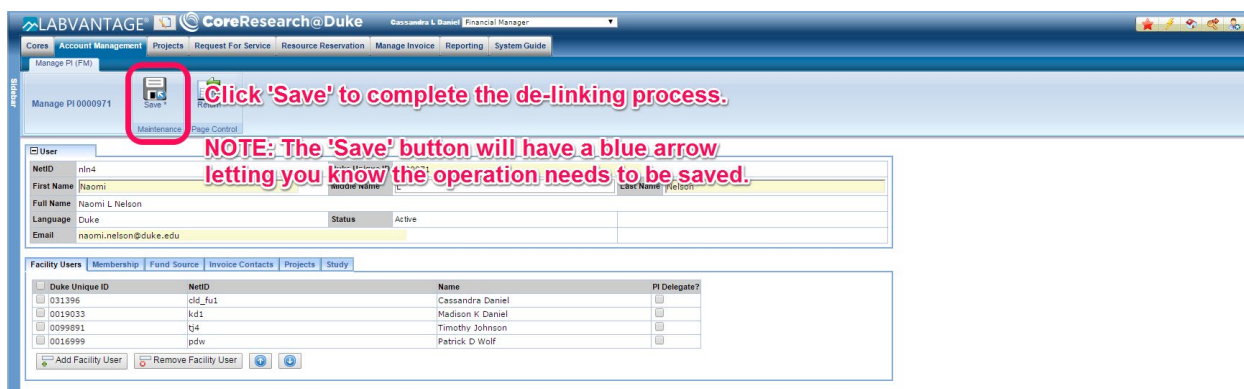


The screenshot shows the 'Manage PI (FM)' page for PI 0000971. The 'User' section displays details for Naomi L. Nelson. Below this, the 'Facility Users' section shows a table of users associated with the PI. The 'Remove Facility User' button is highlighted with a red box.

Duke Unique ID	NetID	Name	PI Delegate?
031396	cld_fu1	Cassandra Daniel	<input type="checkbox"/>
0019033	kd1	Madison K. Daniel	<input type="checkbox"/>
0099891	tj4	Timothy Johnson	<input type="checkbox"/>
0016999	pdw	Patrick D. Wolf	<input type="checkbox"/>

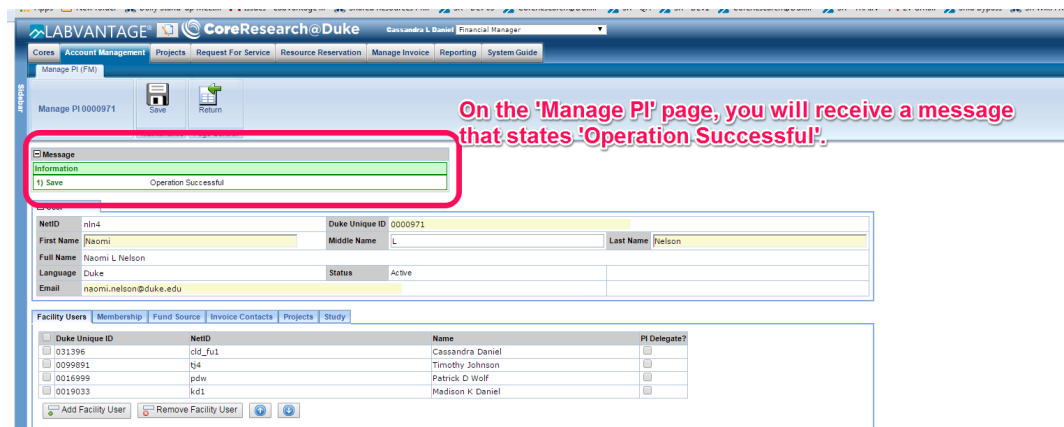
8. Click on 'Save'.

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.



The screenshot shows the 'Manage PI (FM)' page for PI 0000971. The 'Save' button is highlighted with a red box. A red arrow points to the 'Save' button with the text 'Click \'Save\' to complete the de-linking process.' and a red box around the 'Save' button with the text 'NOTE: The \'Save\' button will have a blue arrow letting you know the operation needs to be saved.'

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



The screenshot shows the 'Manage PI (FM)' page for PI 0000971. A message box is highlighted with a red box, displaying '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 the refresh the page.



Manage Projects | Historical Projects

Project List | Add New | Edit | Delete | View | Activate | On Hold

Search Bar: 1 - 500 of 1000 (1,456) (1000 of 26925) 1 2 > Next

Search: [] OK

Search By Query:

- Projects by Account#
- Projects by FM
- My Projects
- Projects by Core/Biosbank
- Projects by PI

Search By Folder:

ADD NEW

- ...to a new Folder
- ...

Adhoc Search (New Adhoc Query)

Project	Title	PI	Financial Manager 1	Status	Account Number
PH 000868	Jeffrey H Potter				
PR-00779	3998310_UNDESIGNATED REAL ESTATE	Jeffrey H Potter (jpotter)	Jeffrey H Potter (jpotter)	Active	3998310
PH 0008370	P.J. Eric Stallard				
PR-00858	3997425_E_STALLARD DISC FUND	P.J. Eric Stallard (stall013)	Tanya D Exum Costoni (tanva)	Active	3997425
PH 0008397	Rosalyn B Ritts				
PR-00709	3998319_CVD-UNIV STOCK	Rosalyn B Ritts (rits002)	F Dozier (dozie002)	Active	3998319
PR-01002	3995015_CVD-MED CTR STOCK	Rosalyn B Ritts (rits002)	F Dozier (dozie002)	Active	3995015
PH 0010777	Jeanne B Kirschner				
PR-00391	0004590237_GSP SCIENCE SOCIETY	Jeanne B Kirschner (bkirsch)	Melissa Sena (mds55)	Active	0004590237

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



Manage Projects | Historical Projects

Project List | Add New | Edit | Delete | View | Activate | On Hold

Search Bar: 1 - 500 of 1000 (1,456) (1000 of 26925) 1 2 > Next

Search: [] OK

Search By Query:

- Projects by Account#
- Projects by FM
- My Projects
- Projects by Core/Biosbank
- Projects by PI

Search By Folder:

ADD NEW

- ...to a new Folder
- ...

Adhoc Search (New Adhoc Query)

Project	Title	PI	Financial Manager 1	Status	Account Number
PR-00043	Rhinovirus Project	Geoffrey S Ginsburg (ginsb005)	Cassandra Daniel (clid43_sa)	Active	123456
PH 0465502PI	Lauren Horne				
PR-00026	393-2125_Apheresis - Ulcerative Colitis Site	Lauren Horne (lmh36_pl)	Lauren Horne (lmh36_fm)	Active	393-2125

6. The status of the project will change to 'On Hold'.



Manage Projects | Historical Projects

Project List | Add New | Edit | Delete | View | Activate | On Hold

Search Bar: 1 - 500 of 1000 (1,456) (1000 of 26925) 1 2 > Next

Search: [] OK

Search By Query:

- Projects by Account#
- Projects by FM
- My Projects
- Projects by Core/Biosbank
- Projects by PI

Search By Folder:

ADD NEW

- ...to a new Folder
- ...

Adhoc Search (New Adhoc Query)

Project	Title	PI	Financial Manager 1	Status	Account Number
PR-00043	Rhinovirus Project	Geoffrey S Ginsburg (ginsb005)	Cassandra Daniel (clid43_sa)	On Hold	123456
PH 0465502PI	Lauren Horne				
PR-00026	393-2125_Apheresis - Ulcerative Colitis Site	Lauren Horne (lmh36_pl)	Lauren Horne (lmh36_fm)	On Hold	393-2125

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.



Click to refresh the page

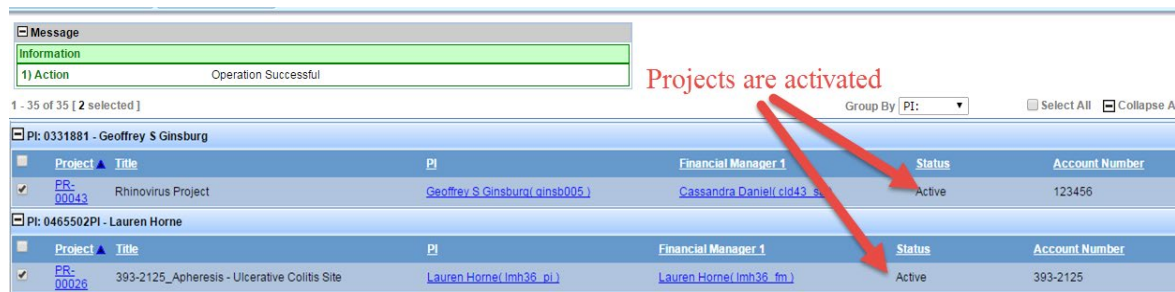
5. Select the Project or Projects 'On Hold' and click the 'Activate' button.



Click on the 'Activate' button

Select the project(s)

6. Projects are activated.

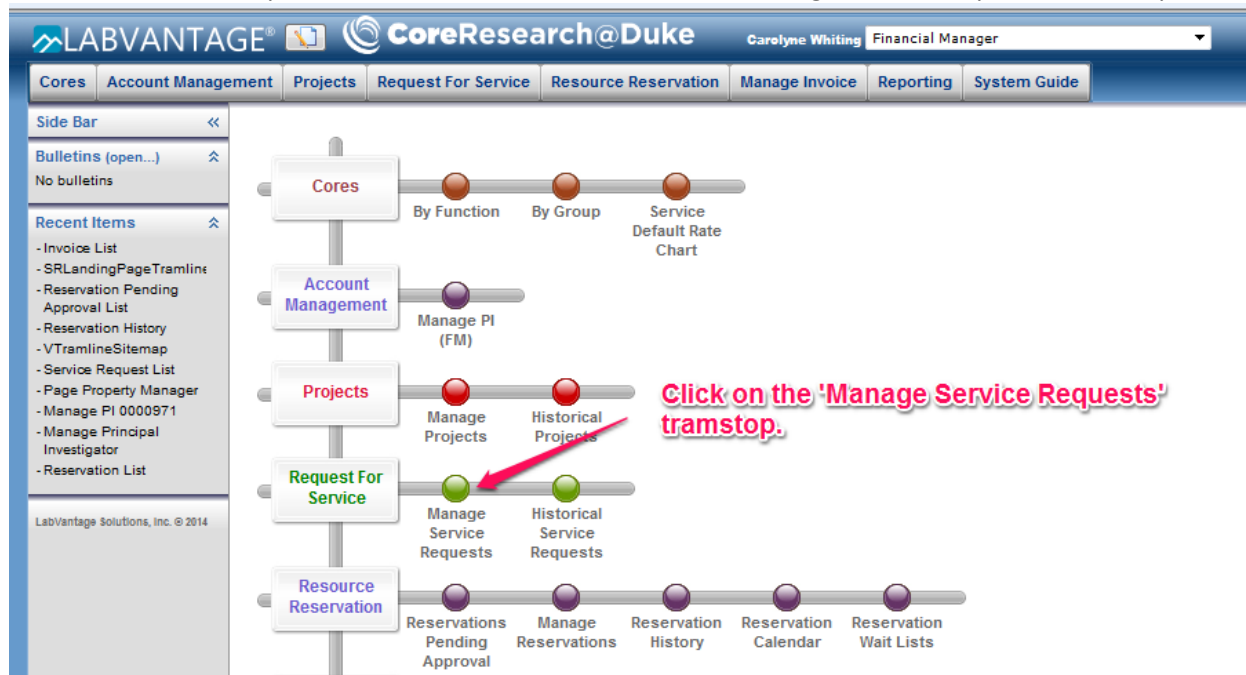


Projects are activated

Project	Title	PI	Financial Manager 1	Status	Account Number
PR-00043	Rhinovirus Project	Geoffrey S Ginsburg (ginsb005)	Cassandra Daniel (cid43_sa)	Active	123456
PR-00026	393-2125_Apheresis - Ulcerative Colitis Site	Lauren Horne (lmh36_pi)	Lauren Horne (lmh36_fm)	Active	393-2125

Request Queries

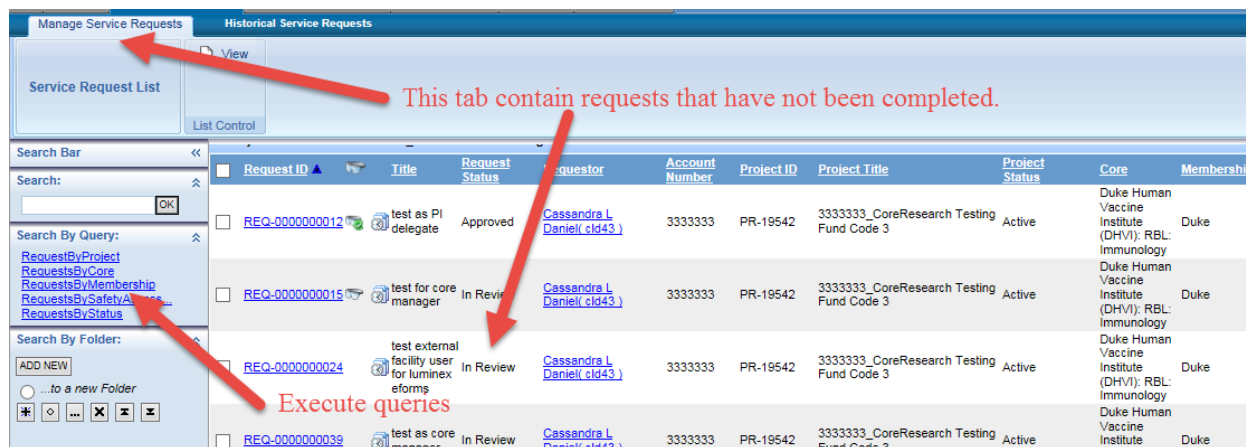
1. Access CoreResearch@Duke.
2. From the 'Request for Service' Tramline, click on the 'Manage Service Requests' Tramstop.



The screenshot shows the LABVANTAGE CoreResearch@Duke interface. The top navigation bar includes tabs for Cores, Account Management, Projects, Request For Service, Resource Reservation, Manage Invoice, Reporting, and System Guide. The left sidebar contains a 'Recent Items' list. The main area displays a tramline with stops for Cores, Account Management, Projects, Request For Service, and Resource Reservation. The 'Request For Service' tramline has two stops: 'Manage Service Requests' and 'Historical Service Requests'. A red arrow points to the 'Manage Service Requests' stop with the text '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.



The screenshot shows the 'Manage Service Requests' page. The top navigation bar includes tabs for 'Manage Service Requests' and 'Historical Service Requests'. The 'Manage Service Requests' tab is active, showing a 'Service Request List' table. A red arrow points to the 'Service Request List' tab with the text 'This tab contain requests that have not been completed.' Another red arrow points to the 'Execute queries' button with the text 'Execute queries'.

Request ID	Title	Request Status	Requestor	Account Number	Project ID	Project Title	Project Status	Core	Membership
REQ-0000000012	test as PI delegate	Approved	Cassandra L. Daniel (cid43)	3333333	PR-19542	3333333_CoreResearch Testing Fund Code 3	Active	Duke Human Vaccine Institute (DHVI): RBL: Immunology	Duke
REQ-0000000015	test for core manager	In Review	Cassandra L. Daniel (cid43)	3333333	PR-19542	3333333_CoreResearch Testing Fund Code 3	Active	Duke Human Vaccine Institute (DHVI): RBL: Immunology	Duke
REQ-0000000024	test external facility user for luminex eforms	In Review	Cassandra L. Daniel (cid43)	3333333	PR-19542	3333333_CoreResearch Testing Fund Code 3	Active	Duke Human Vaccine Institute (DHVI): RBL: Immunology	Duke
REQ-0000000039	test as core manager	In Review	Cassandra L. Daniel (cid43)	3333333	PR-19542	3333333_CoreResearch Testing Fund Code 3	Active	Duke Human Vaccine Institute (DHVI): RBL: Immunology	Duke

Historical Service Requests

The 'Historical Service Requests' tab displays completed, rejected, and cancelled services.

Manage Service Requests | **Historical Service Requests**

Service Request List | View | List Control

Search Bar: 1 - 15 of 15 [0 selected] Group By: Project ID: [Select]

Search: [] OK

Search By Query: RequestByProject, RequestsByCore, RequestsByMembership, RequestsBySafetyAssess..., RequestsByStatus

Search By Folder: ADD NEW, ...to a new Folder, [*], [/], [...], [X], [>], [<]

This tab displays completed, cancelled, and rejected Service Requests.

Request ID	Title	Request Status	Requestor	Account Number	Project ID	Project Title	Project Status	Core	Mem
REQ-0000000008	test for external facility user	Rejected	Cassandra L. Daniel (cld43)	4444444	PR-19543	4444444_CoreResearch Testing Fund Code 4	Active	Fund Expired	Duke Human Vaccine Institute (DHVI): RBL: Immunology
REQ-0000000016	Carol's PI Title EForm	Cancelled	Carolyn Whiting (caw34)	4444444	PR-19543	4444444_CoreResearch Testing Fund Code 4	Active	Fund Expired	Duke Human Vaccine Institute (DHVI): RBL: Immunology

Historical Projects

This page contains all the closed projects or projects with inactive fund codes that can be accessed by the user.

Manage Projects | **Historical Projects**

Project List | View | Activate | List Control | Miscellaneous

Search Bar: 1 - 500 of 1000 [0 selected] (1000) 1 2 Next Group By: PI: Selection Mode: All Pages Select All

Search: [] OK

Search By Query: Projects by Account#, Projects by PI, My Projects, Projects by Core/Biobank, Projects by PI

Search By Folder: ADD NEW, ...to a new Folder, [*], [/], [...], [X], [>], [<]

This tab displays closed projects and inactive fund codes associated with the user

Project ID	Title	PI	Financial Manager 1	Status	Account Number
PR-05227	3934941_COUGAR BIOTECH CLIN AGRMNT #COU-AA-302	Daniel J. George (georg003)	Dorothy A. Peters (peter041)	Fund Expired	3934941
PR-00335	0004591046_MANAGING AT DUKE	Kimberley Harris (kharis)	Gwendolyn Purnell (purnell2)	Fund Expired	0004591046

Execute queries

Invoice Queries

1. Access CoreResearch@Duke.
2. From the 'Manage Invoice' Tramline, click on the 'Manage Invoices' tramstop.

LABVANTAGE®  **CoreResearch@Duke** Carolyn Whiting Financial Manager

Cores **Account Management** **Projects** **Request For Service** **Resource Reservation** **Manage Invoice** **Reporting** **System Guide**

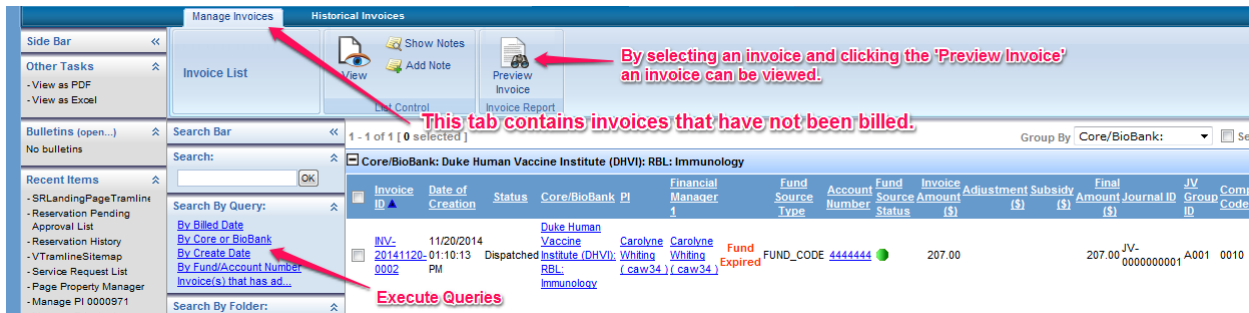
Side Bar <<
Bulletins (open...) >>
No bulletins
Recent Items >>
- Invoice List
- SRLandingPageTramline
- Reservation Pending Approval List
- Reservation History
- VTramlineSitemap
- Service Request List
- Page Property Manager
- Manage PI 0000971
- Manage Principal Investigator
- Reservation List
LabVantage Solutions, Inc. © 2014

Cores By Function By Group Service Default Rate Chart
Account Management Manage PI (FM)
Projects Manage Projects Historical Projects
Request For Service Manage Service Requests Historical Service Requests
Resource Reservation Reservations Pending Approval Manage Reservations Reservation History Reservation Calendar Reservation Wait Lists
Manage Invoice Manage Invoices Historical Invoices

Click the 'Manage Invoices' tramstop



- Once on the 'Manage Invoices' list page, there are a number of activities that can be executed to display desired invoices



By selecting an invoice and clicking the 'Preview Invoice' an invoice can be viewed.

This tab contains invoices that have not been billed.

Execute Queries

Invoice ID	Date of Creation	Status	Core/BioBank	PI	Financial Manager	Fund Source Type	Account Number	Fund Source Status	Invoice Amount (\$)	Adjustment (\$)	Subsidy (\$)	Final Amount (\$)	Journal ID	JV Group ID	Company	Fiscal Period	SAP Document No.
INV-20141120-0002	11/20/2014 01:10:13 PM	Dispatched	Duke Human Vaccine Institute (DHVI); RBL; Immunology	Carolyn Whiting (caw34)	Carolyn Whiting (caw34)	Fund Expired	FUND_CODE 444444		207.00			207.00	JV-0000000001	A001	0010	0514	600068841

- Click on the 'Historical Invoice tab to review Invoices that have posted to SAP.



This tab contains invoices that have been billed.

The SAP Document Number is displayed for billed invoices.

Invoice ID	Date of Creation	Status	Core/BioBank	PI	Financial Manager	Fund Source Type	Account Number	Fund Source Status	Invoice Amount (\$)	Adjustment (\$)	Subsidy (\$)	Final Amount (\$)	Journal ID	JV Group ID	Company	Fiscal Period	SAP Document No.
INV-20141124-0016	11/24/2014 04:24:44 PM	Billed	Duke Human Vaccine Institute (DHVI); RBL; Immunology	Madison S Spach (cspach)	Madison S Spach (cspach)	FUND_CODE 3935014			207.00			207.00	JV-0000000008	A001	0010	0514	600068841
INV-20141124-0017	11/24/2014 04:25:04 PM	Billed	Duke Human Vaccine Institute (DHVI); RBL; Immunology	Madison S Spach (cspach)	Madison S Spach (cspach)	FUND_CODE 3935014			784.00			784.00	JV-0000000009	A001	0010	0514	600068842
INV-20141124-0018	11/24/2014 04:25:35 PM	Billed	Duke Human Vaccine Institute (DHVI); RBL; Immunology	Madison S Spach (cspach)	Madison S Spach (cspach)	FUND_CODE 3935014			177.00			177.00	JV-0000000010	A001	0010	0514	600068843
INV-20141208-0001	12/08/2014 10:11:20 AM	Billed	Duke Human Vaccine Institute (DHVI); RBL; Immunology	Roger E McLendon (rmclend01)	Amy S Orange (orange01)	FUND_CODE 0004591505			1127.00			1127.00	JV-0000000026	A001	0010	0614	600068879

Searching CoreResearch@Duke for SAP Invoice IDs

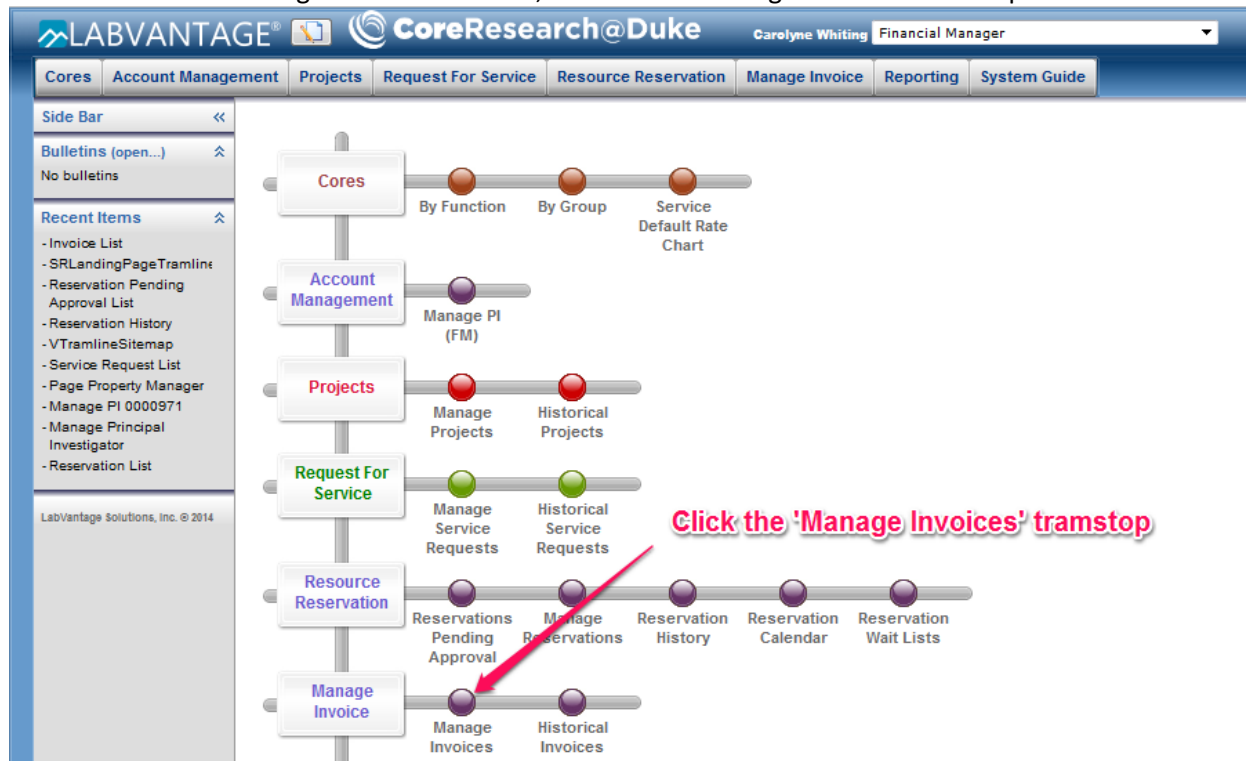
1. On SAP R/3's Document Overview page, one can find useful information to lookup invoices in CoreResearch@Duke. For example, all documents submitted via the CoreResearch@Duke JV automation process will have the Doc Type YL. In addition, the Invoice ID and the Document Number are stored in both SAP R/3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

Doc. Type : YL (CoreResearch@Duke) Normal document

Doc. Number	400143345	Company Code	0010	Fiscal Year	2015
Doc. Date	02/04/2015	Posting Date	01/31/2015	Period	07
Calculate Tax	<input type="checkbox"/>				
Ref.Doc.	JV081461				
Doc. Currency	USD				
Doc. Mdr Text	JV-0000000003				

Item	FW	Account	Account short text	Cost Ctr	Profit Ctr	MBS elem.	Fund	Text	Amount	Funds Center
1	40	690100	INTERDEPARTMENTAL SE		1199998	2033372	2033372	INV-20150116-0001	1,850.00	6860105000
2	50	751000	CREDIT FOR SERVICES	4591085	1199998		4591085		1,850.00-	6860500620
*									0.00	

2. Access CoreResearch@Duke.
3. From the 'Manage Invoice' Tramline, click on the 'Manage Invoices' tramstop.



The screenshot shows the LabVantage interface with the 'Manage Invoice' tramline selected. The tramline consists of several tramstops: 'Manage Invoices' and 'Historical Invoices'. A red arrow points to the 'Manage Invoices' tramstop, and a text overlay says 'Click 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

- Click on the 'Historical Tab' and either paste (Ctrl V) enter to Invoice ID from SAP R/3 and click 'OK'.

- Check the box next to the Invoice ID and click 'Preview Invoice'.

- The invoice will be displayed.

INVOICE # INV-20150116-0001

Integrative Genomic Analysis Shared Resource (GCB)

Duke University/Duke University School of Medicine

Director: David Corcoran

www.genome.duke.edu/cores/analysis/

omics-analysis@duke.edu

Phone: (919) 613-3392

Fax: (919) 668-0795

Project Information

Alejandro Aballay
2033372_5R01-GM070977-11 PARENT
5R01-GM070977-11 PARENT
31-Aug-2015

Invoice Summary

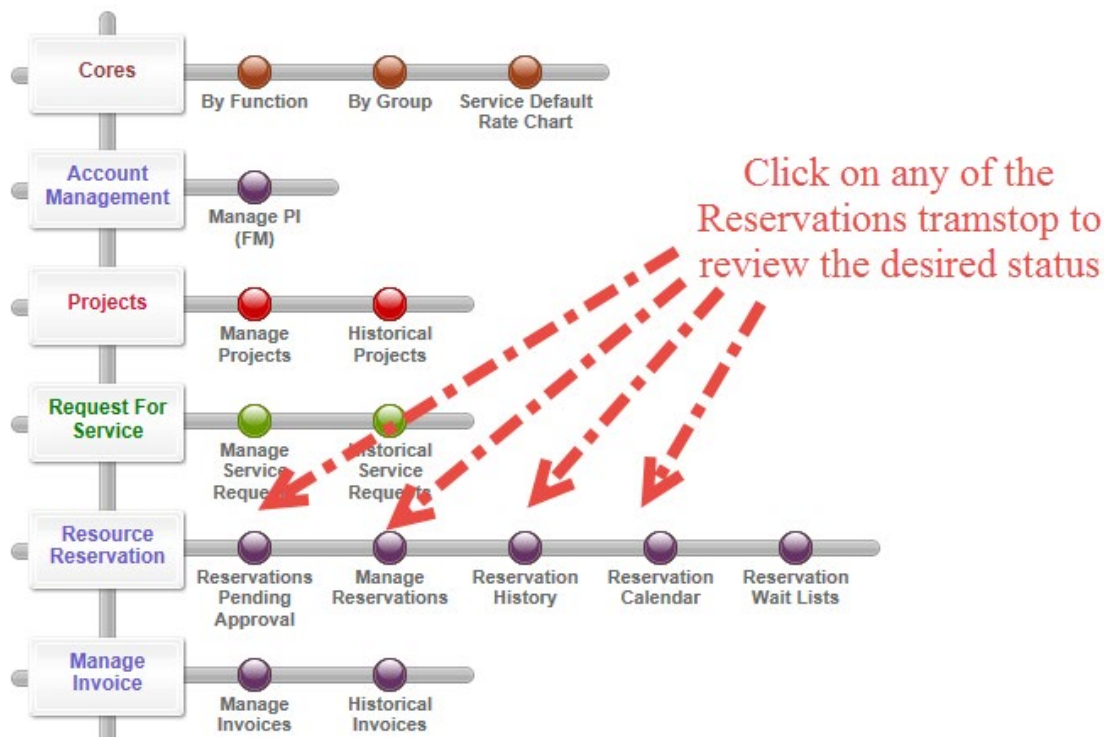
Billing Period	08/15
Invoice Creation Date	01-Feb-2015
Invoice Amount	\$ 1850.00
Subsidy	\$
Adjustment	\$
Total Invoice Amount	\$ 1850.00

Services

Request ID Service Task ID	Date	Requestor/ Fulfiller	Description	Qty	Unit	Cost Per Unit	Line Total
REQ-0000000005 ST-0000000108	18-Jan-2015	Alejandro Aballay/ David L Corcoran	Data Analysis	18.5	Hour	\$ 100.00	\$ 1,850.00
						Subtotal : \$	1,850.00

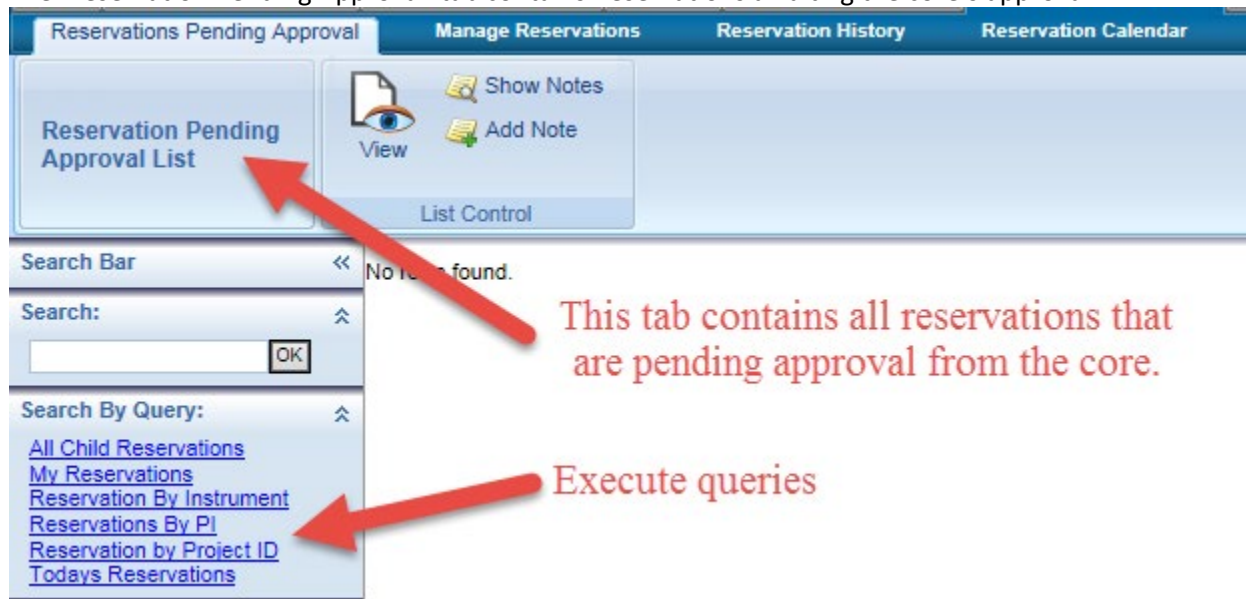
Reservation Queries

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.



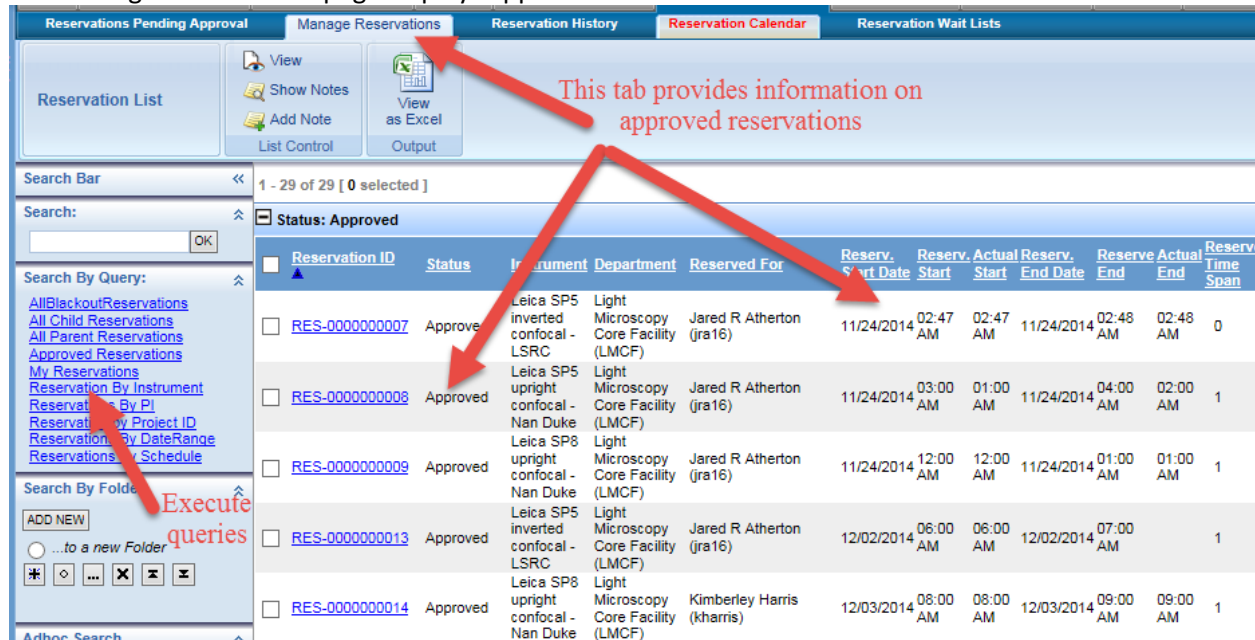
The screenshot shows the 'Reservations Pending Approval' tab. The interface includes a search bar, a search button, and a list of search queries. The search results show 'No items found.' The search queries are:

- All Child Reservations
- My Reservations
- Reservation By Instrument
- Reservations By PI
- Reservation by Project ID
- Today's Reservations

Red arrows point from the text "This tab contains all reservations that are pending approval from the core." to the 'Reservations Pending Approval' tab and from the text "Execute queries" to the search queries.

Manage Reservations

The Manage Reservations page displays approved reservations.



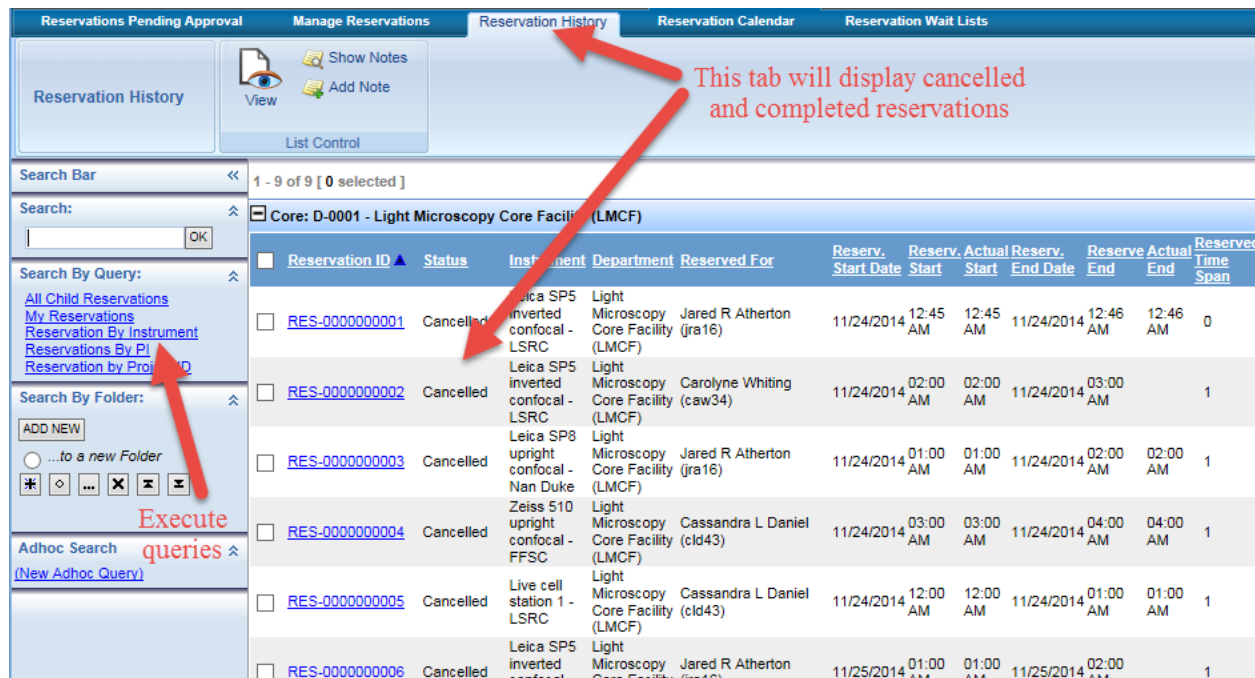
This tab provides information on approved reservations

Execute queries

Reservation ID	Status	Instrument	Department	Reserved For	Reserv. Start Date	Reserv. Start	Actual Start	Reserv. End Date	Reserve End	Actual End	Reserve Time Span
RES-000000007	Approved	Leica SP5 inverted confocal - LSRC	Light Microscopy Core Facility (LMCF)	Jared R Atherton (jra16)	11/24/2014	02:47 AM	02:47 AM	11/24/2014	02:48 AM	02:48 AM	0
RES-000000008	Approved	Leica SP5 upright confocal - Nan Duke	Light Microscopy Core Facility (LMCF)	Jared R Atherton (jra16)	11/24/2014	03:00 AM	01:00 AM	11/24/2014	04:00 AM	02:00 AM	1
RES-000000009	Approved	Leica SP8 upright confocal - Nan Duke	Light Microscopy Core Facility (LMCF)	Jared R Atherton (jra16)	11/24/2014	12:00 AM	12:00 AM	11/24/2014	01:00 AM	01:00 AM	1
RES-000000013	Approved	Leica SP5 inverted confocal - LSRC	Light Microscopy Core Facility (LMCF)	Jared R Atherton (jra16)	12/02/2014	06:00 AM	06:00 AM	12/02/2014	07:00 AM		1
RES-000000014	Approved	Leica SP8 upright confocal - Nan Duke	Light Microscopy Core Facility (LMCF)	Kimberley Harris (kharris)	12/03/2014	08:00 AM	08:00 AM	12/03/2014	09:00 AM	09:00 AM	1

Reservation History

This page displays cancelled and completed reservations.



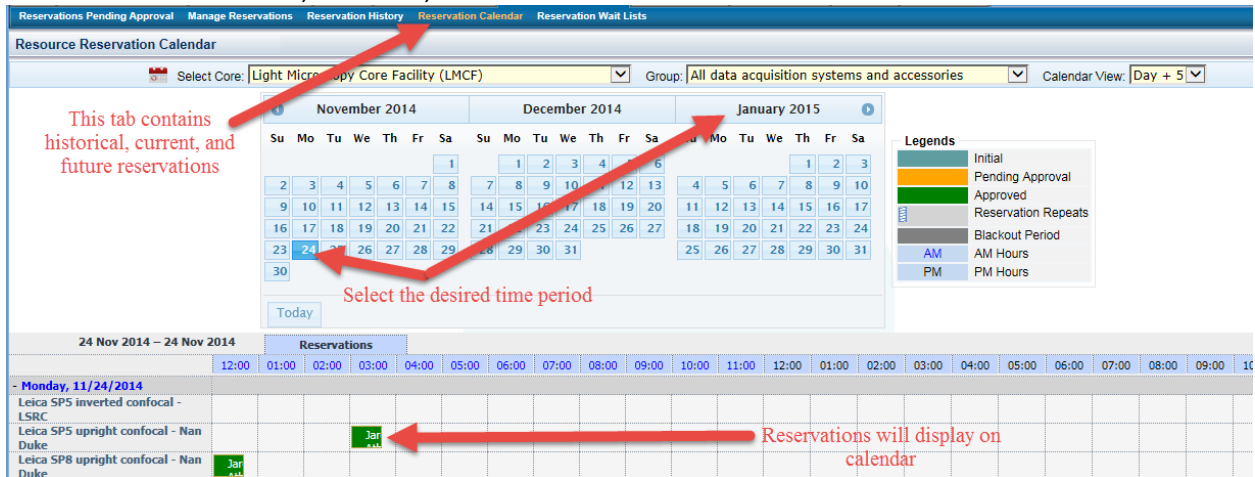
This tab will display cancelled and completed reservations

Execute queries

Reservation ID	Status	Instrument	Department	Reserved For	Reserv. Start Date	Reserv. Start	Actual Start	Reserv. End Date	Reserve End	Actual End	Reserve Time Span
RES-000000001	Cancelled	Leica SP5 inverted confocal - LSRC	Light Microscopy Core Facility (LMCF)	Jared R Atherton (jra16)	11/24/2014	12:45 AM	12:45 AM	11/24/2014	12:46 AM	12:46 AM	0
RES-000000002	Cancelled	Leica SP5 inverted confocal - LSRC	Light Microscopy Core Facility (LMCF)	Carolyn Whiting (caw34)	11/24/2014	02:00 AM	02:00 AM	11/24/2014	03:00 AM		1
RES-000000003	Cancelled	Leica SP8 upright confocal - Nan Duke	Light Microscopy Core Facility (LMCF)	Jared R Atherton (jra16)	11/24/2014	01:00 AM	01:00 AM	11/24/2014	02:00 AM	02:00 AM	1
RES-000000004	Cancelled	Zeiss S10 upright confocal - FFSC	Light Microscopy Core Facility (LMCF)	Cassandra L Daniel (cld43)	11/24/2014	03:00 AM	03:00 AM	11/24/2014	04:00 AM	04:00 AM	1
RES-000000005	Cancelled	Live cell station 1 - LSRC	Light Microscopy Core Facility (LMCF)	Cassandra L Daniel (cld43)	11/24/2014	12:00 AM	12:00 AM	11/24/2014	01:00 AM	01:00 AM	1
RES-000000006	Cancelled	Leica SP5 inverted confocal -	Light Microscopy Core Facility	Jared R Atherton (jra16)	11/25/2014	01:00 AM	01:00 AM	11/25/2014	02:00 AM		1

Reservation Calendar

This tab contains current, historical, and future reservations.



The screenshot shows the 'Reservation Calendar' tab in the CoreResearch@Duke system. The interface includes a navigation bar with tabs: 'Reservations Pending Approval', 'Manage Reservations', 'Reservation History', 'Reservation Calendar' (selected), and 'Reservation Wait Lists'. Below the navigation bar, there are dropdown menus for 'Select Core' (set to 'Light Microscopy Core Facility (LMCF)') and 'Group' (set to 'All data acquisition systems and accessories'). A 'Calendar View' dropdown is set to 'Day + 5'.

The main calendar area displays three months: November 2014, December 2014, and January 2015. A red arrow points to the 'Reservation Calendar' tab with the text: 'This tab contains historical, current, and future reservations'. Another red arrow points to the calendar grid with the text: 'Select the desired time period'. A legend on the right side of the calendar area defines the following colors and symbols:

- Initial (Light Blue)
- Pending Approval (Orange)
- Approved (Green)
- Reservation Repeats (Grey)
- Blackout Period (Dark Grey)
- AM (Light Blue)
- PM (Dark Blue)

Below the calendar grid, a timeline view shows reservations for the period '24 Nov 2014 - 24 Nov 2014'. The timeline is divided into hourly slots from 12:00 to 10:00. A reservation is shown for 'Monday, 11/24/2014' at 03:00, labeled 'Leica SP5 upright confocal - Nan Duke'. A red arrow points to this reservation with the text: '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

System Guide Type: FAQ		
System Guide Name	System Guide Type	Summary
General FAQ and Common Issues	FAQ	General FAQ and Common Issues
System Guide Type: How-To		
System Guide Name	System Guide Type	Summary
How to Create a Service Request	How-To	This how-to details the steps necessary to create a new service request in the CoreResearch@Duke application.
How to Create an EForm Service Request	How-To	How to Create an EForm Service Request
How to View an Existing Service Request	How-To	How to View an Existing Service Request
How to Edit an Existing Service Request	How-To	How to Edit an Existing Service Request
How To Cancel a Service Request as a Requestor	How-To	How To Cancel a Service Request as a Requestor
How To Delete a Service Request	How-To	How To Delete a Service Request
How To Create a Reservation	How-To	How To Create a Reservation
How To Edit a Reservation Request	How-To	How To Edit a Reservation Request
How To Cancel a Reservation Request	How-To	How To Cancel a Reservation Request

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?*