CoreResearch@Duke

CoreResearch@Duke Shared Resources Training Guide

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

5/14/15
Version 1.8

CoreResearch@Duke

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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.
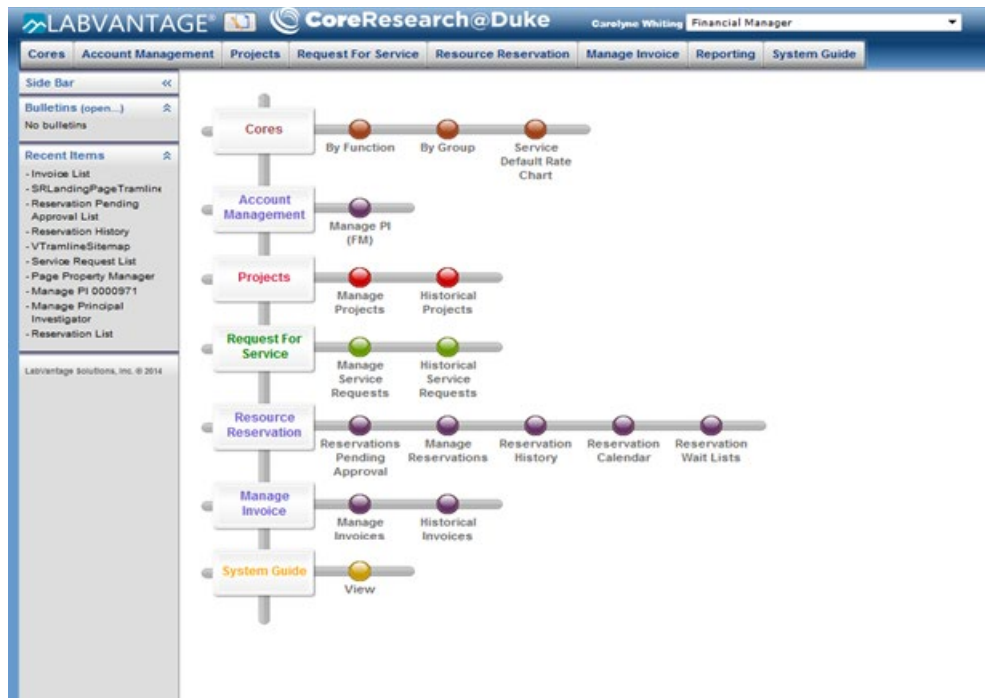
System Requirements

Supported Browsers:

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

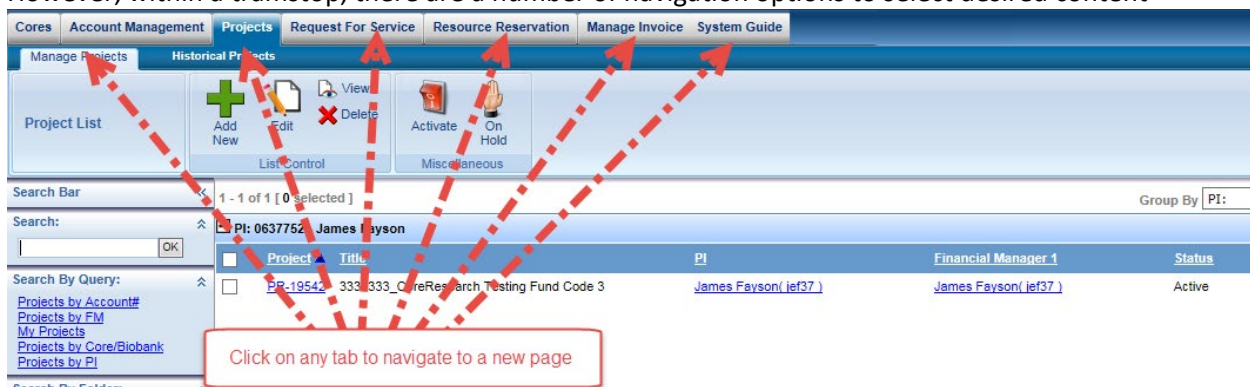Pop Up Blockers *MUST* be disabled for this site.

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

Click on any tab to navigate to a new page

CoreResearch@Duke
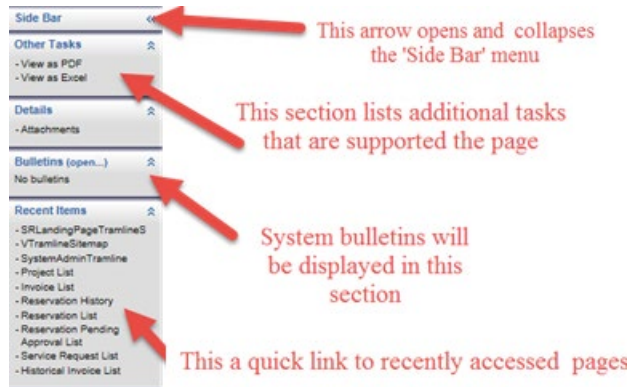
Control Icons

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.

This arrow opens and collapses the 'Side Bar' menu

This section lists additional tasks that are supported the page

System bulletins will be displayed in this section

This a quick link to recently accessed pages

CoreResearch@Duke

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.

![CoreResearch@Duke logo]

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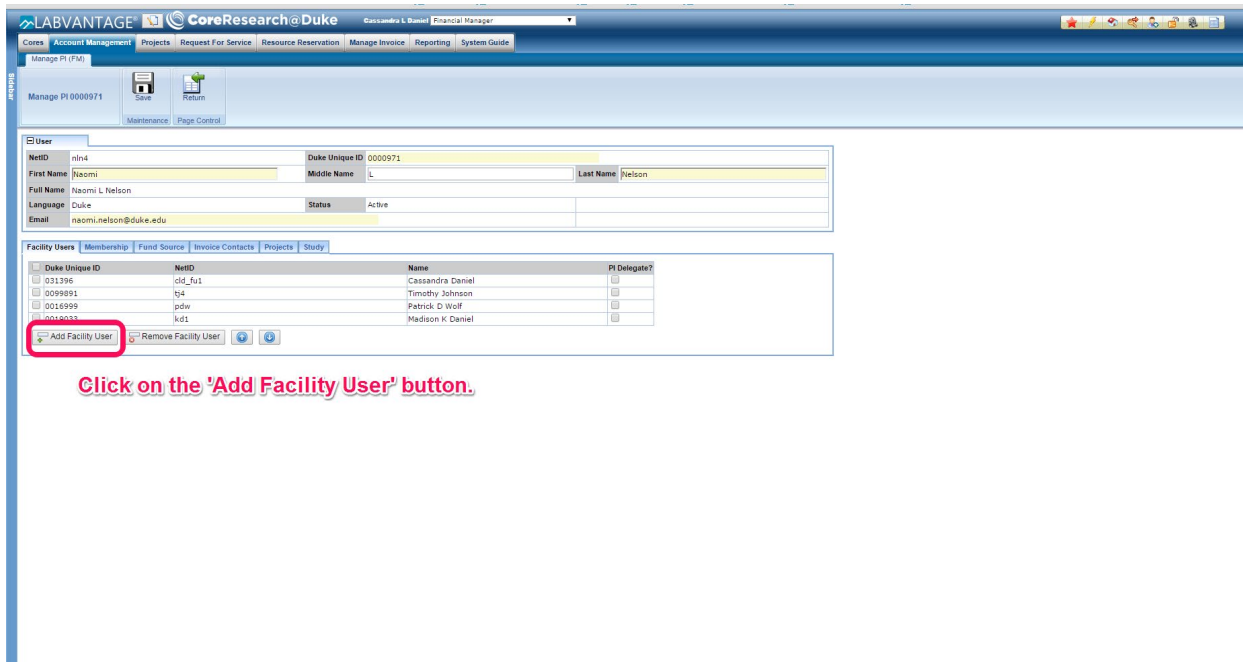
6. Click on the 'Add Facility User' button.

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.
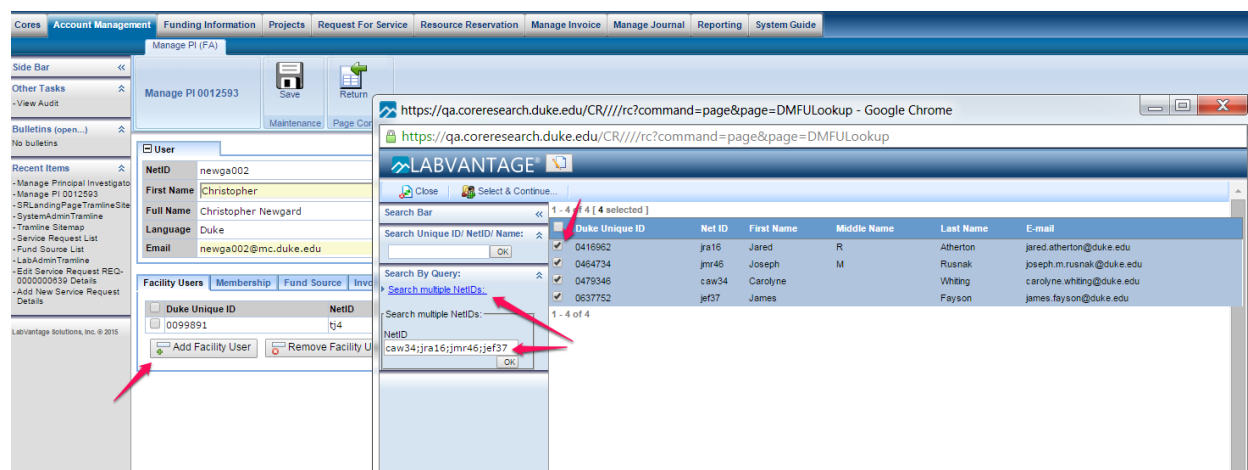
9. You will receive a message confirming the 'Operation was Successful' and Click on 'OK' in the 'Processing Status' box.
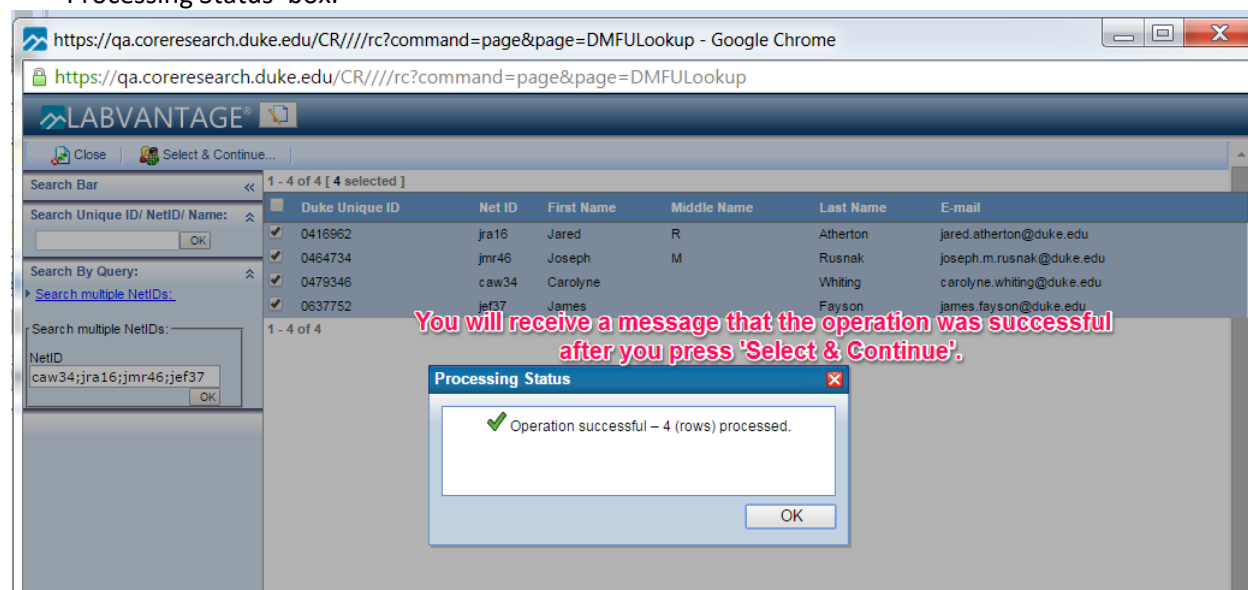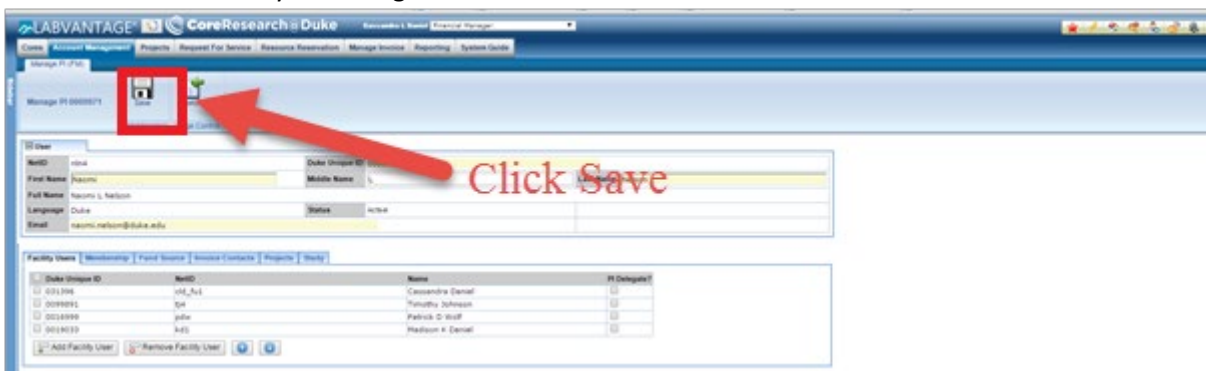
The Facility User appears in the 'Facility Users' tab.
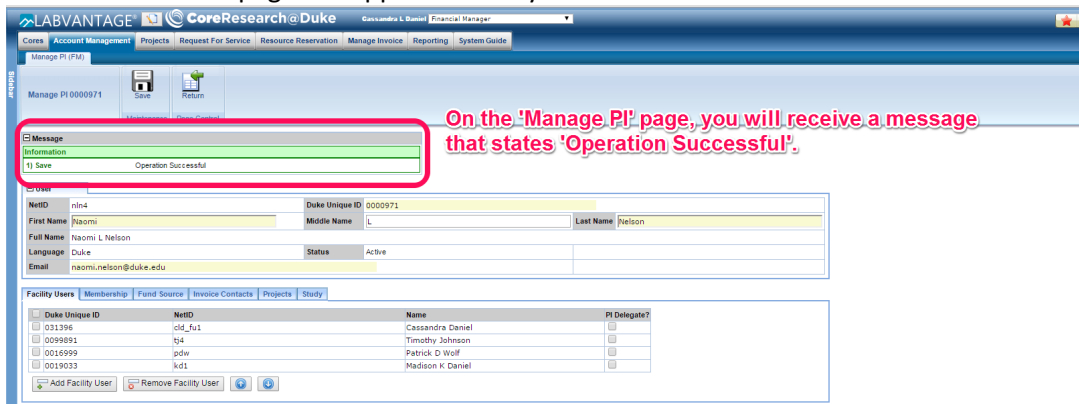
11. Click 'Save' to store your changes.

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'.

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.

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

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.
NOTE: You will only be able to add one Facility User at a time.
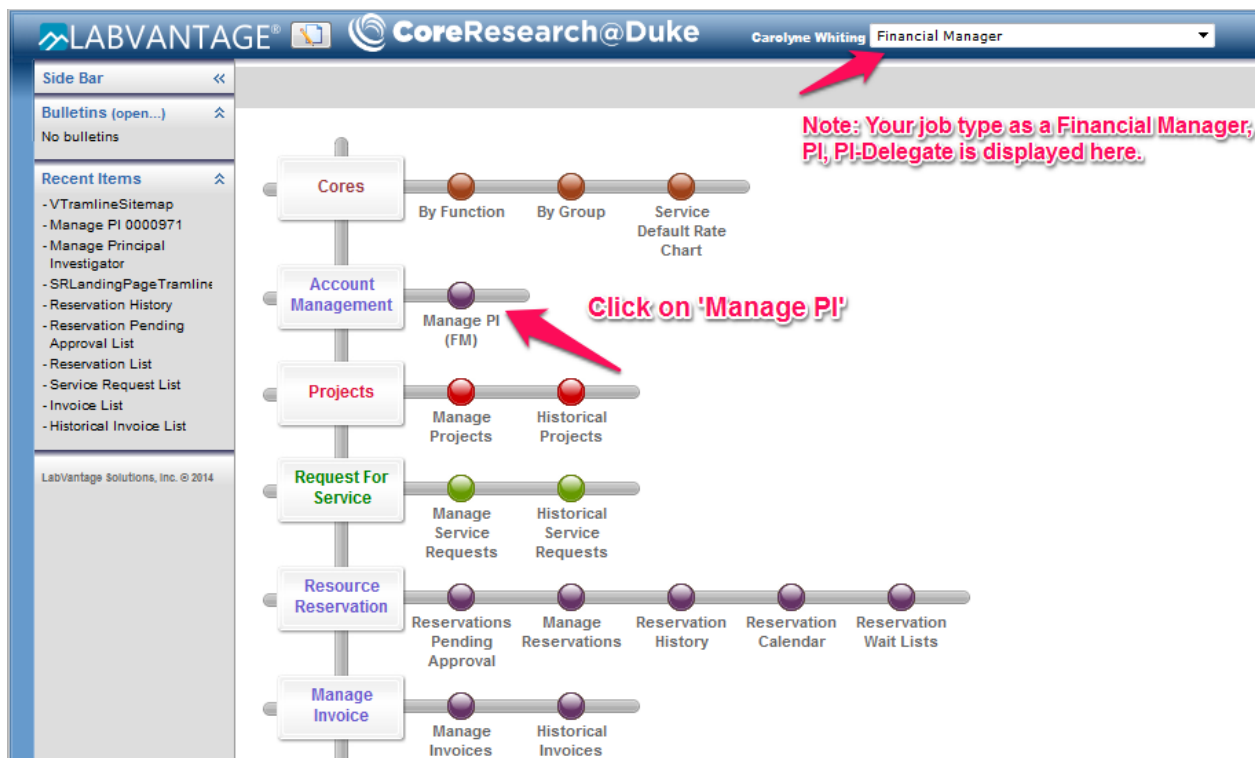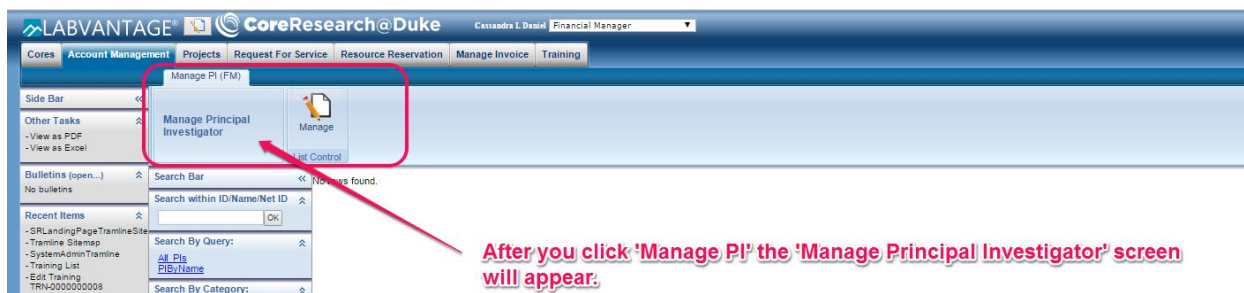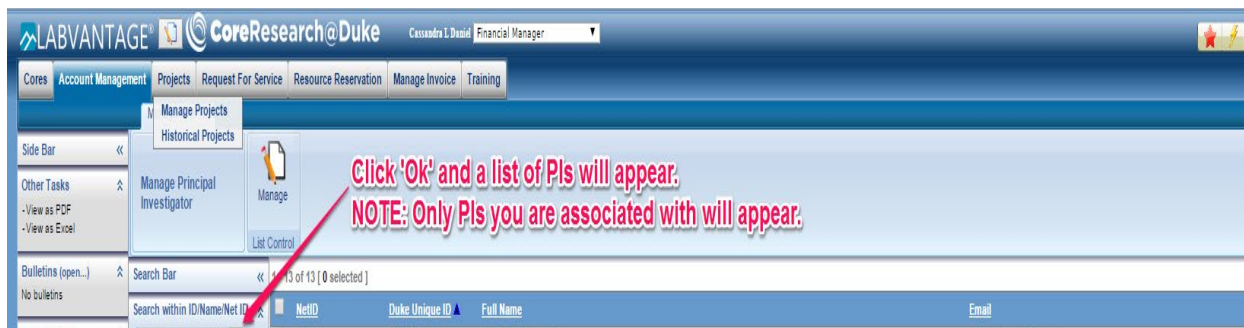
NOTE: Once you select the 'Duke Unique ID', the 'Manage PI' page will be displayed.
The top tab displays information about the PI.
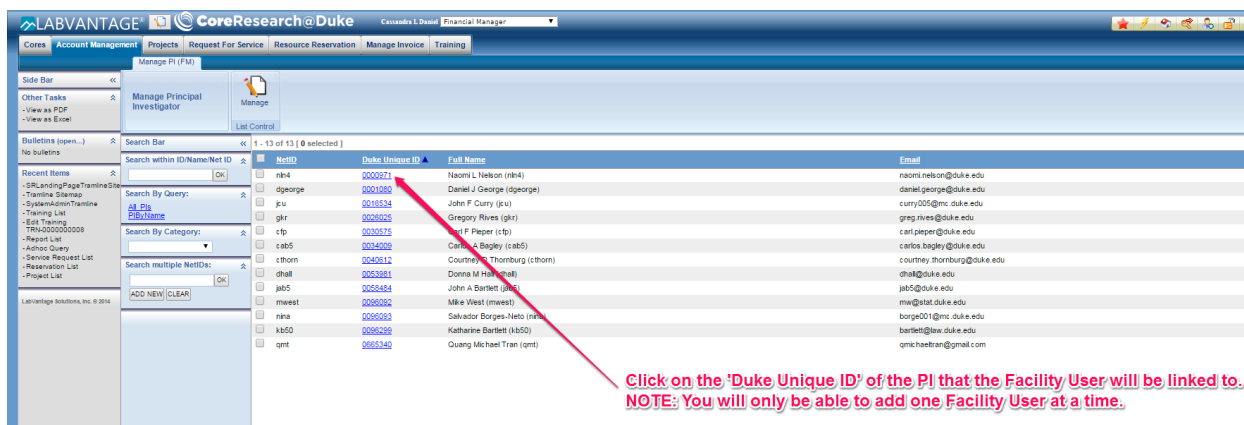
The 'User' tab displays information related to the PI.

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

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

CoreResearch@Duke

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'.

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.

Click Save

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

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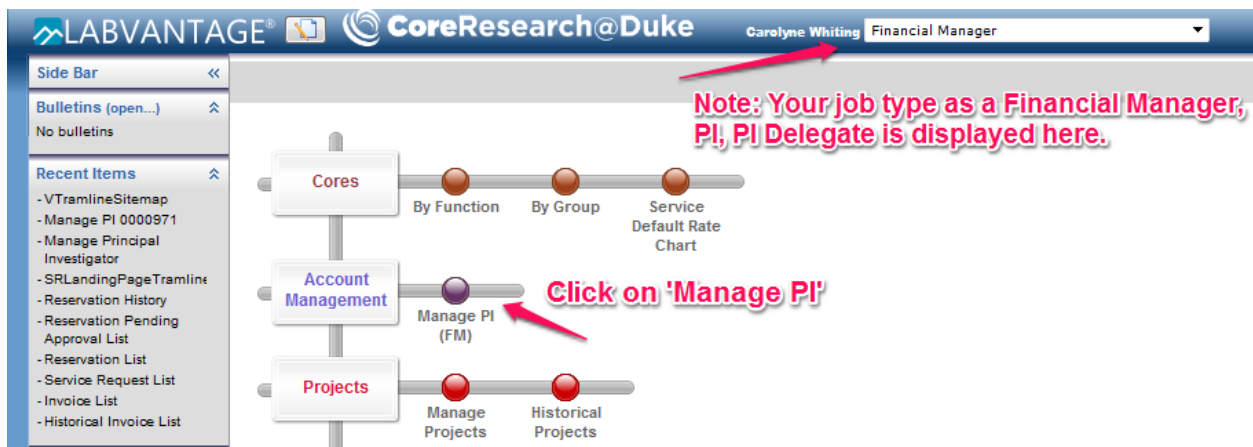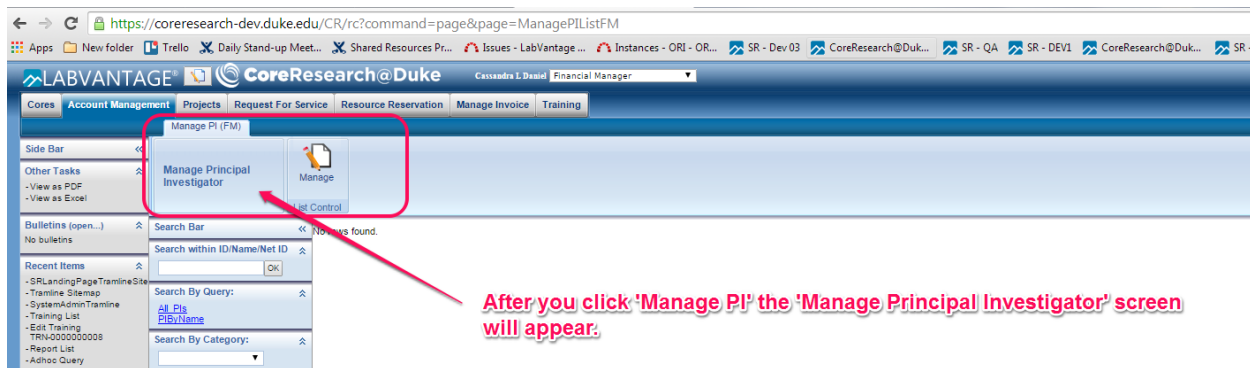
3. The 'Manage Principal Investigator' page will be displayed.
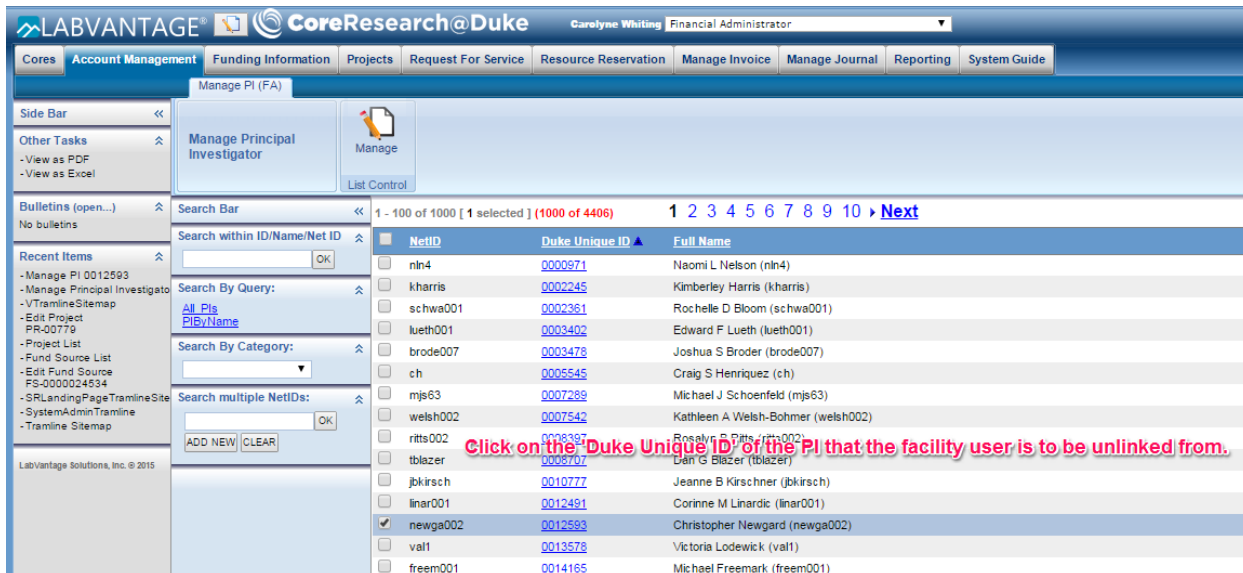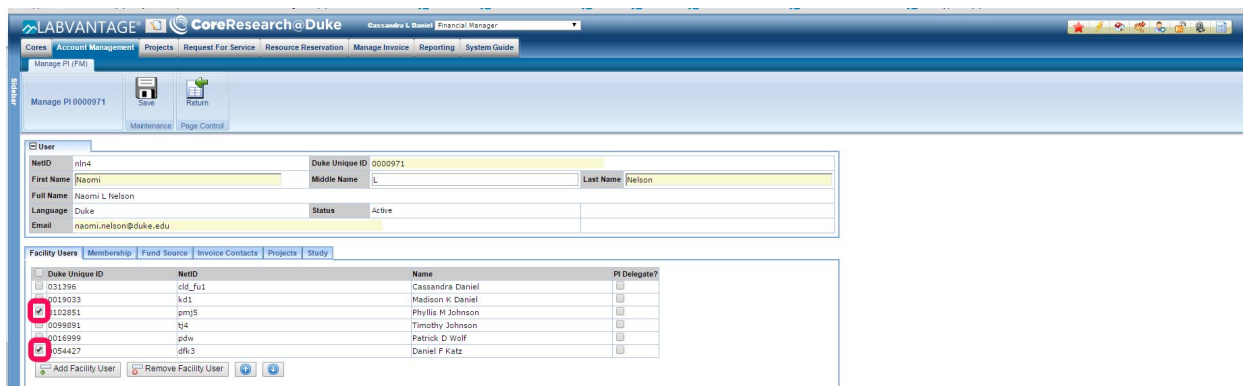
4. To select a PI to manage, click on the 'Duke Unique ID'.
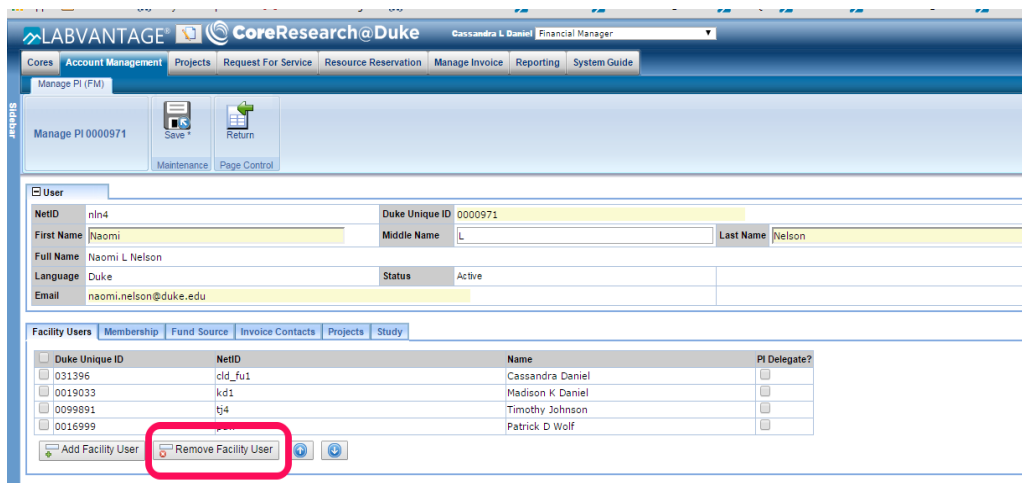   NOTE: You will only be able to manage one PI at a time.

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

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.
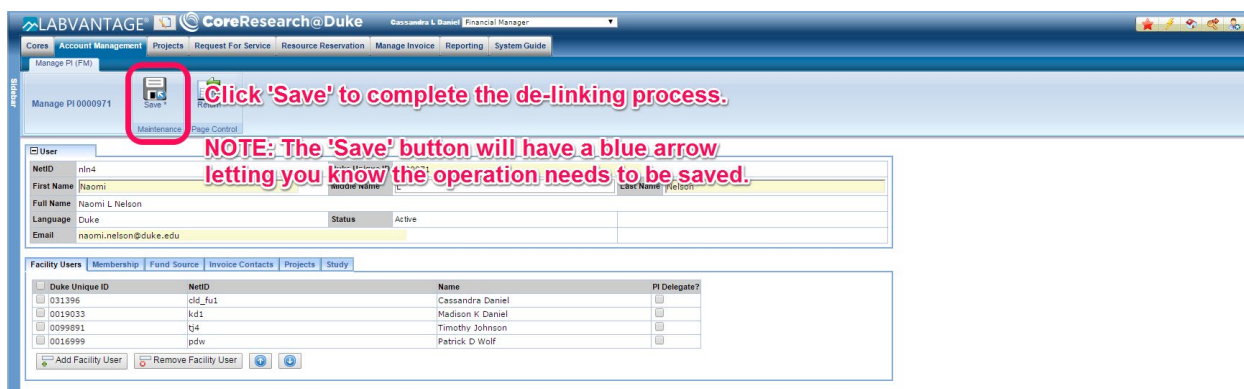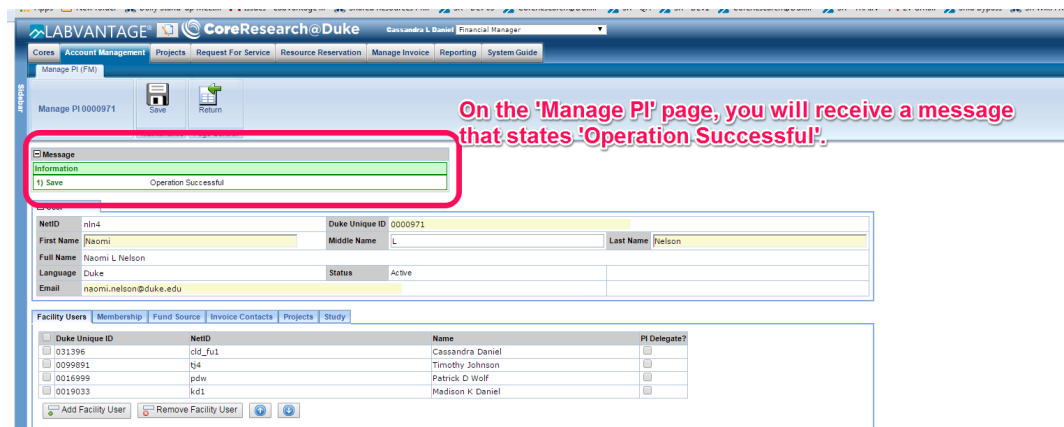
7. Click on 'Remove Facility User'.

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

Click the Manage Project 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.

Click to refresh the page

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

Click on the 'On Hold' button

Select the project(s)

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

The projects are 'On Hold'

Activating an On Hold Project

1. LOGIN to CoreResearch@Duke.
2. The Tramline page will display.

Click the Manage Project Tramstop

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.
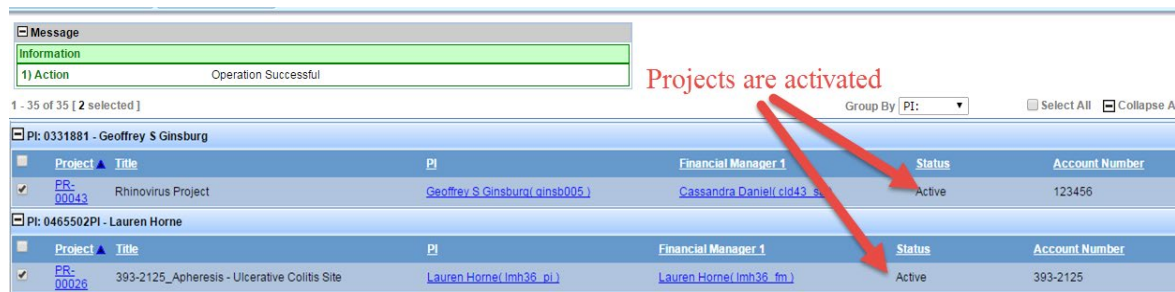

Click to refresh the page

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

Click on the 'Activate' button
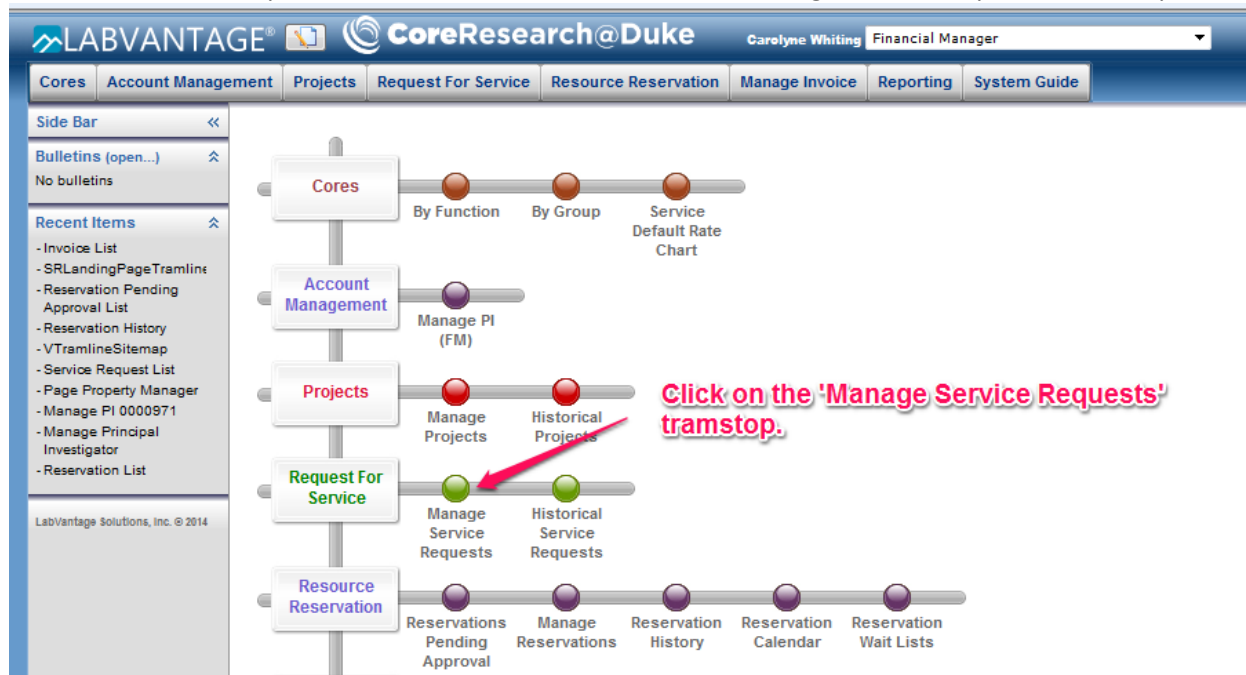
Select the project(s)
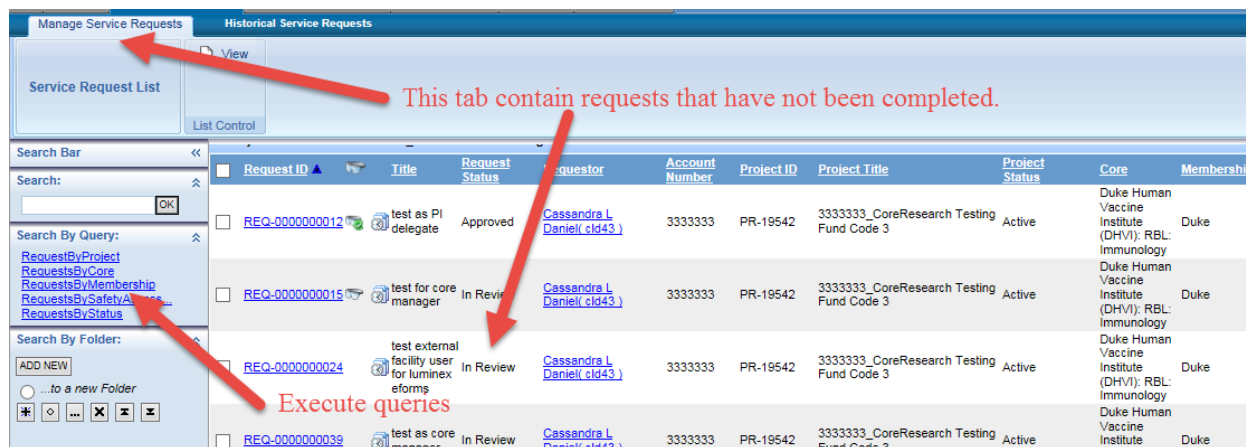
6. Projects are activated.

Projects are activated

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.

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
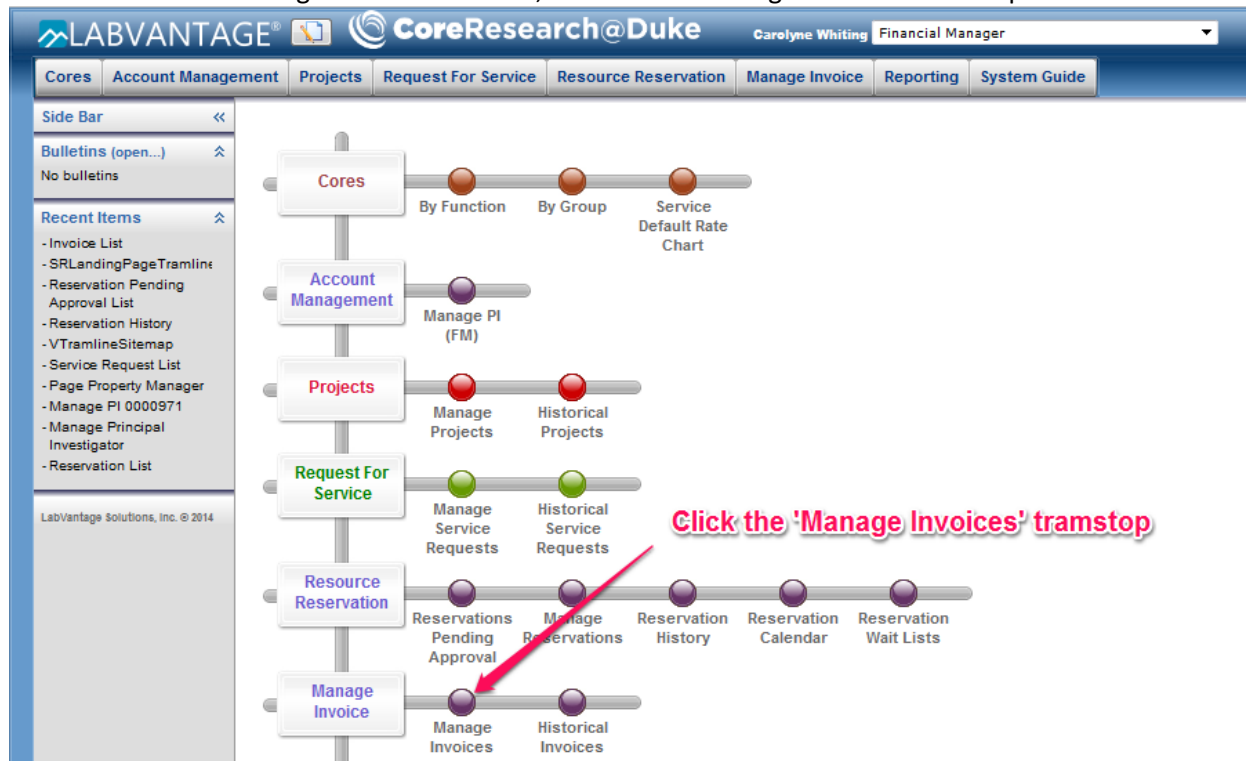
1. On SAP R/3's Document Overview page, one can find useful information to lookup invoices in CoreResearch@Duke. For example, all documents submitted via the CoreResearch@Duke JV automation process will have the Doc Type YL. In addition, the Invoice ID and the Document Number are stored in both SAP R/3 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.

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

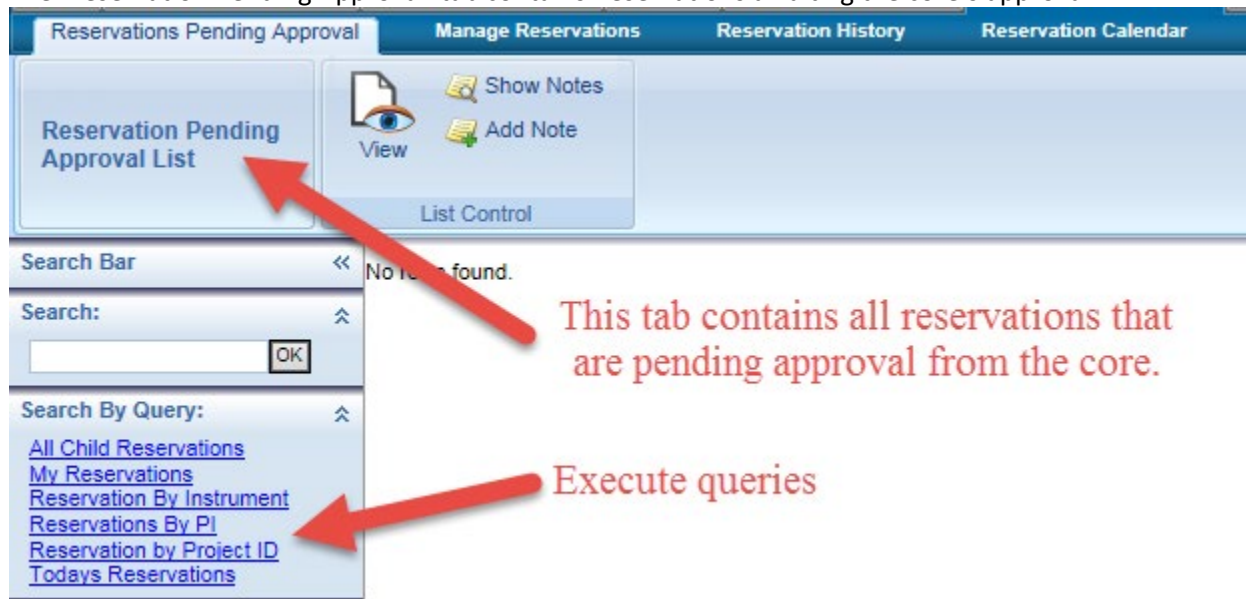| Request ID Service Task ID	Date	Requestor/ Fulfiller	Description	Qty	Unit	Cost Per Unit	Line Total
REQ-0000000005 ST-0000000108	16-Jan-2015	Alejandro Aballay/ David L Corcoran	Data Analysis	18.5	Hour	$ 100.00	$ 1,850.00
						Subtotal : $	1,850.00

![CoreResearch@Duke logo]

Reservation Queries

1. Access CoreResearch@Duke.
2. From the 'Resource Reservation' Tramline, click on the desired Tramstop.
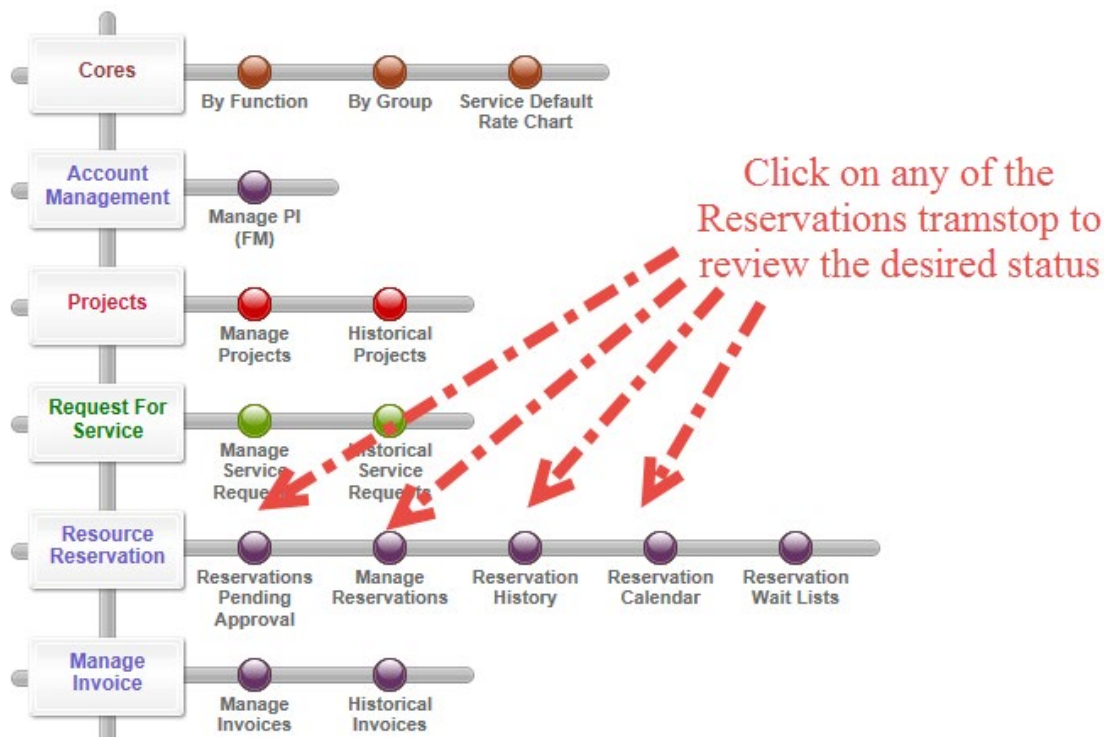
Reservations Pending Approval

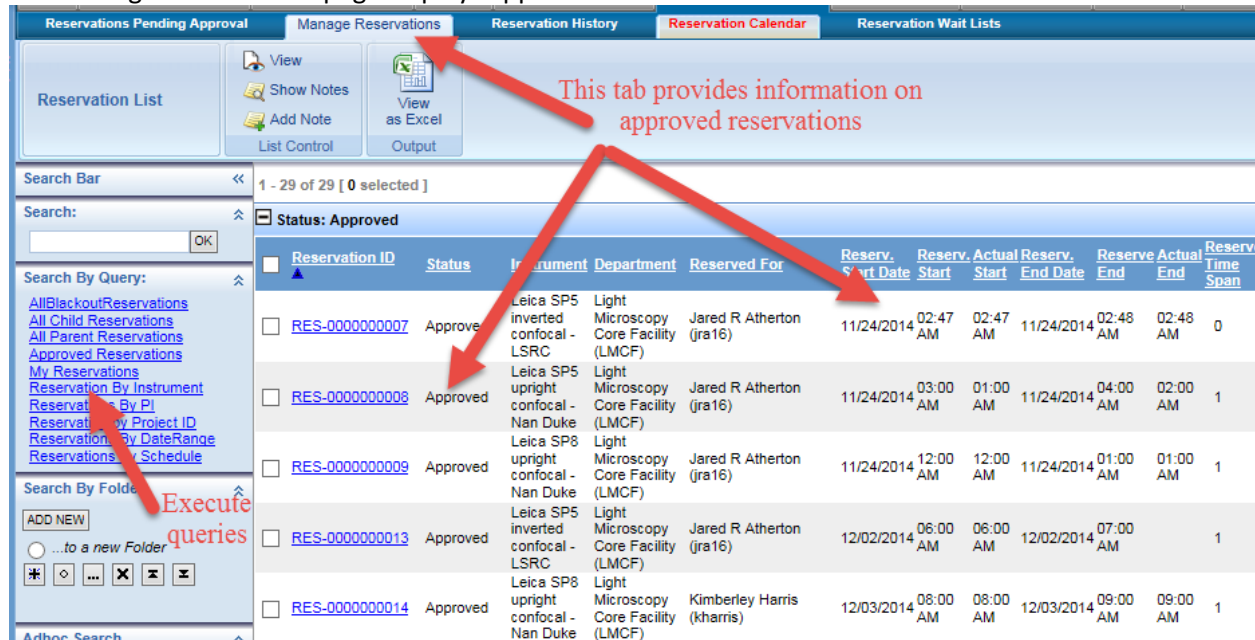The 'Reservation Pending Approval' tab contains Reservations awaiting the core's approval.

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.

Additional Information:

Additional training information can be found under the System Guide tramline

1. Click the View tramstop to retrieve training material

System Guide Name	System Guide Type	Summary
System Guide Type: FAQ		
General FAQ and Common Issues	FAQ	General FAQ and Common Issues
System Guide Type: How-To		
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?*