



# CoreResearch@Duke Service Requests User Guide

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07/29/18  
Version 1.0

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## Target Audiences

This document supports Core activities for the following CoreResearch@Duke (CR@D) Job Types: Core Director, Core Manager and Core Financial Manager.

## Navigation

Service Requests operations are performed on the LIMS Sitemap / Request for Service tramline



## Service Requests Overview

Requests from customers (Facility Users) for service(s) to be fulfilled by the Core will come in the form of Service Requests. Service Requests can be initiated by customers (Facility Users) directly, or initiated by Core Personnel. When a Service Request is 'Submitted for Approval' by a customer, the Core is notified by an email notification to the Core Email Address. A Service Request ID (e.g. REQ-0000000577) will be provided in the email notification.

## Service Request Life Cycle

The life cycle of a Service Request in CoreResearch@Duke is depicted below:

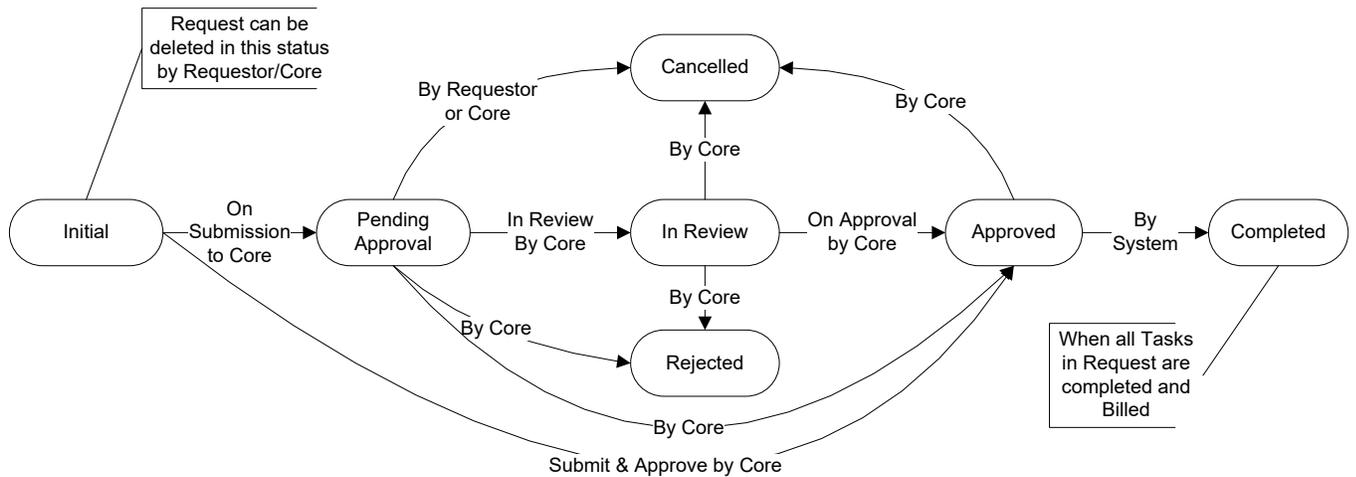


Figure 1: Request for Service Life Cycle

### Initial

- A Service Request created by the Requestor or Core Personnel will receive the “Initial” status.
- While the status is “Initial”, the Requestor or Core Personnel may enter or edit necessary details for the Request
- The Requestor or Core Personnel can delete a Request with this status.

### Pending Approval

- After the creation of the Request, the Requestor or Core Personnel will submit the Request to the Core for review and approval. Upon submission, the Request status is changed to “Pending Approval”.
- While the Request status is “Pending Approval”, the Core Personnel can change the Request status to “Cancelled”, “In Review”, “Approved”, or “Rejected” As shown in Figure 2.
- While the Request status is “Pending Approval”, the Requestor can change the status to “Cancelled”.

### In Review

- The Core Personnel will accept the Request for Review and the Request status changes to “In Review”.
- The Core Personnel can consult with the Requestor to fill in and finalize the details of the Request.
- The Core Personnel can add or remove Service Tasks on the Request.
- The Core Personnel can cancel or reject the Request.
- When the Core Personnel are satisfied with the details of the Request, they can change the status of the Request to “Approved”.

### Approved

- This is the active state of the Request. The Core Staff can start working on Requests in this status. The Service Tasks associated with the Request are performed and subsequent operations like service execution, peer review, and invoice generation are allowed.
- This operation requires that the Service Request have the status of “Initial”, “Pending Approval” or “In Review”.
- The Core Personnel can submit and approve the Request on creation time using ‘Submit & Approve’ button.
- The Core Personnel can add or delete Service Tasks to the Request.
- The Core Personnel will also have an option to cancel the Request that has this status.

#### **Completed**

- When all the Service Tasks associated to the Request are completed (all Service Tasks have the status “Billed”), the Request will be automatically marked as **Completed**. This is the last state of the Request.
- Once the Request is marked as Completed no further operations to the Request or associated Service Tasks allowed.

#### **Cancelled**

- The Core Personnel can cancel a Request that has the status of “Pending approval”, “Approved”, or “In Review”.
- The Requestor can cancel the Request in the “Initial” or “Pending Approval” statuses.
- After the Request has been cancelled, it moves to the Historical Tramstops.
- The User can view the Historical Request details in read-only mode.
- A notification will be sent to the Requestor with comments when the Request is cancelled by the Core Personnel.

#### **Rejected**

- The Core Personnel can reject a Request that is in “Pending Approval” and “In Review” status.
- A notification will be sent to the Requestor with comments when the Request is rejected by the Core Personnel.

## Service Task Life Cycle

The life cycle of a Service Task in CoreResearch@Duke is depicted below:

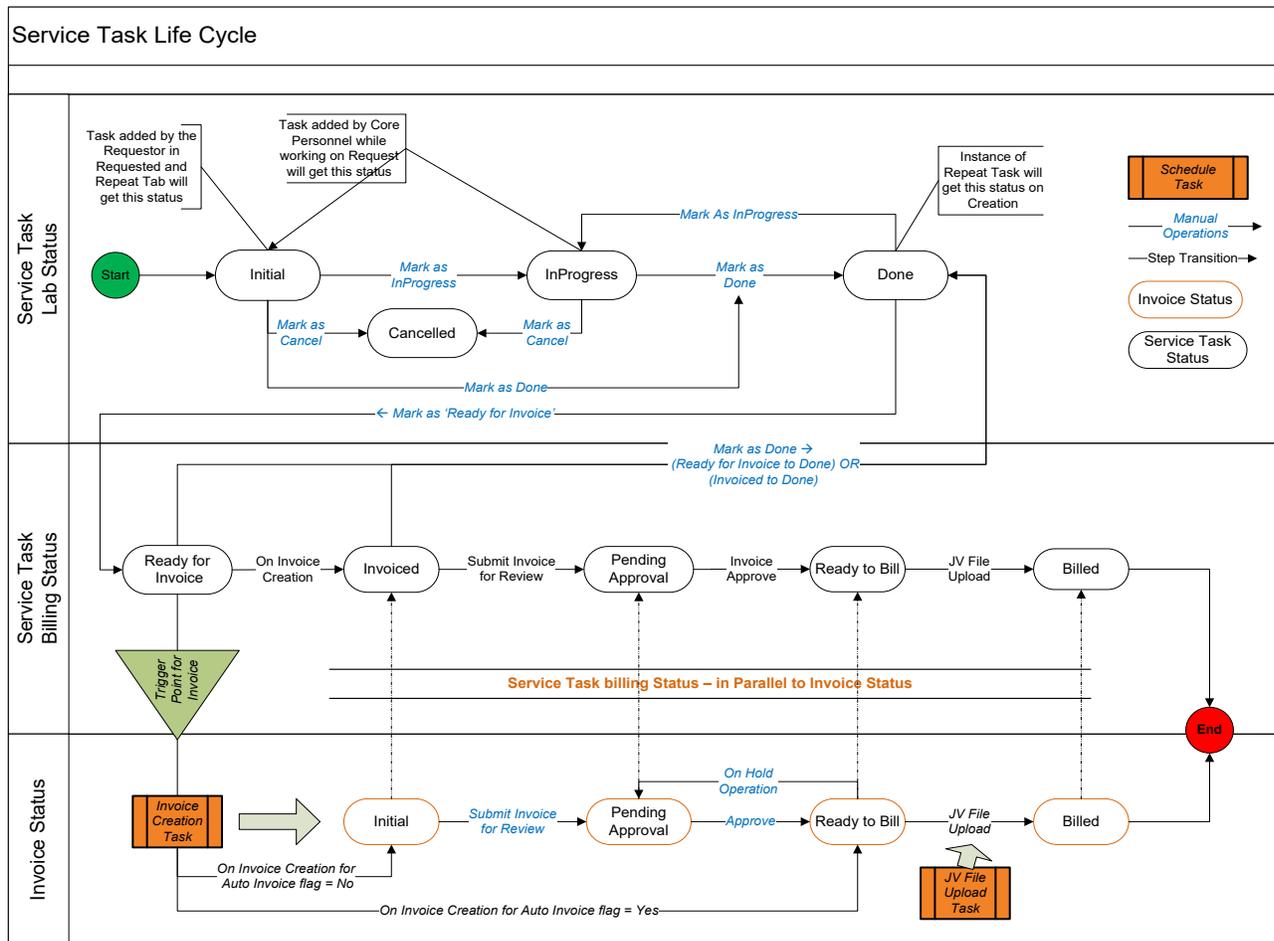


Figure 2: Service Task Life Cycle

**Initial**

- A Service Task will get this status when the Ad-hoc or Repeat Services are assigned to the Request by the Requestor
- The Core Personnel will also have the option to add Ad-hoc Service Task(s) to the approved Request under Service Performed tab. The Service Task status will be "Initial" on creation if the User selects Service Task and clicks 'Select as Initial' button on the Service Task List page.

**In Progress**

- A Service Task will get this status when the Core Personnel have indicated that work has been started on the selected Service Task or the Core Staff wants to revert the task back from "Done" status in order to modify the information of the Service Task.
- The Core Personnel will select and mark the Service Task as "In Progress" using a 'Mark as InProgress' button.
- This operation requires that the Service Task have the status of "Initial" or "Done".
- The Core Personnel will also have the option to add Ad-hoc Service Task(s) to the approved Request under the Service Performed tab. The Service Task status will be "In Progress" on creation if the User selects Service Task and clicks 'Select as InProgress' button on the Service Task List page.

**Done**

- A Service Task will receive this status when the Core Staff have completed the work on the Service Task
- Additionally a task will receive this status if a Core Staff reverts the task from the “Ready for Invoice” or “Invoiced” statuses in order to modify the information of the Service Task.
- This is a manual operation and the Core Staff will use the ‘Mark as Done’ button in order to perform this.
- The Core Staff will select the Task and click ‘Mark as Done’ button. The Service Task status changes to the “Done” status.
- This operation requires that a Service Task have the status of “Initial”, “In Progress”, “Ready for Invoice” or “Invoiced”.
- The Service Task instance of the Repeat Service(s) will also get this status on creation.
- The Service Task that is marked as “Done” by Core Staff will then be available for peer review.

**Ready for Invoice**

- This is the next stage of the Service Task lifecycle after the task has been marked as “Done” by the Core staff after completing the work on the Task.
- The Core Manager will review the work done by the Core Staff and if they feel that it qualifies for invoicing, they will mark the Service Task as “Ready for Invoice”.
- This operation requires that Service Task have the status of “Done”.
- Once a Task has acquired a status of “Ready for Invoice”, it can still be reverted to the “Done” status if the User needs to modify the Service Task information.

**Invoiced**

- A Schedule Task will generate Invoices for all the eligible Service Tasks (status = “Ready for Invoice”) for the PI and Account# combination. The Service Task will get this status on the Invoice creation.
- The Core Personnel can run the same task manually from the Invoice List page also.
- This operation requires that a Service Task first have the status of “Ready for Invoice”.
- The Service Task will obtain the status of “Invoiced” upon the successful generation of the Invoice.

**Pending Approval**

- When the Core Personnel submits the Invoices to the PI and Financial Managers using ‘Submit for Review’ button (Invoice status = “Initial”), the Service Tasks associated with Invoice will get this status.
- In addition, when the Core Personnel put the Invoice(s) on hold (Invoice status = “Ready to Bill”), Service Tasks associated with the Invoice(s) will get this status.
- This relationship is described in ‘Invoicing and Billing Information’ FRS.

**Ready to Bill**

- When the Core Personnel approves the Invoices using ‘Approve’ button (Invoice status = “Pending Approval”), the Service Tasks associated with Invoice will get this status.
- In addition, For the Cores with Auto Invoice flag ‘Yes’, associated Service Tasks with Invoices will get this status on Invoice creation.
- This relationship is described in ‘Invoicing and Billing Information’ FRS.

**Billed**

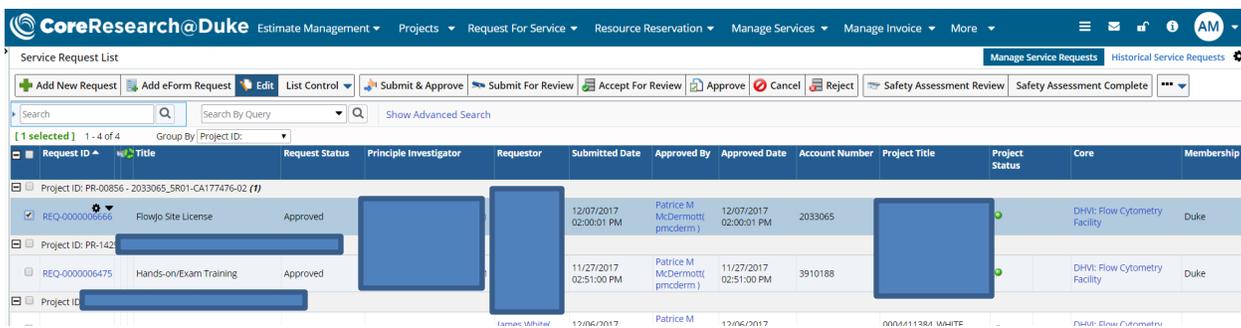
- After the LABVANTAGE System creates the JV file and uploads it to SAP/R3, the status of the Service Task changes to “Billed”.
- This is an automated process. The LABVANTAGE will have a schedule task to execute this.
- This operation requires that the Service Task have the status of “Invoiced”.

**Cancelled**

- The Core Personnel can cancel the Service Task.
- This operation requires that the Service Task have the status of “Initial” or “InProgress”.

## Steps

1. Service Requests can be found in the Service Request List by going to the Manage Service Requests Tram Stop on the Request For Service Tram Line.
2. You will be presented with the [Service Request List Page](#) where you can search for the newly received Service Request using the basic Search function or Search By Query function on the Search Bar. The basic Search will search the Service Request ID. Other queries search other specific values to find the Estimate you are looking for.
3. Select the Service Request you would like to review by clicking on the Service Request ID hyperlink or by selecting the checkbox next to it and select Edit.



Request ID	Title	Request Status	Principle Investigator	Requestor	Submitted Date	Approved By	Approved Date	Account Number	Project Title	Project Status	Core	Membership
REQ-000006656	Flowjo Site License	Approved			12/07/2017 02:00:01 PM	Patrice M McDermott (pmcderm)	12/07/2017 02:00:01 PM	2033065			DHVI: Flow Cytometry Facility	Duke
REQ-000006475	Hands-on/Exam Training	Approved			11/27/2017 02:51:00 PM	Patrice M McDermott (pmcderm)	11/27/2017 02:51:00 PM	3910188			DHVI: Flow Cytometry Facility	Duke

4. You will be presented with an Edit Service Request page. Here you can review the details of the Services Requested by the customer and any Attachments they may have attached as supporting documentation for the Service Request.

[Service Request](#)
[Billing Info](#)
[Parent Request](#)
[Service Description](#)
[Safety Assessment](#)
[Audit](#)

Service Request ID *	REQ-000006739	
Title *	New Test Request	
Core *	D-0059	
Core Name	DHVI: Flow Cytometry Facility	
Project ID *	PR-03744	Request Status: Initial
Requestor *		
Requestor Full Name		
Requestor Email Address		
Requestor Phone Number		

[Services Requested](#)
[Repeat Services](#)
[Attachments](#)

<input type="checkbox"/>	Service ID	Service Name	Billable	Actual Quantity	Project Title
<input type="checkbox"/>	ST-0000001485	Flow Jo Seat	\$	1	
<input type="checkbox"/>	ST-0000001482	Phenotyping (Staff Assisted)	\$	1	
<input type="checkbox"/>	ST-0000001481	Consumables	\$	1	

[Service Request](#)
[Billing Info](#)
[Parent Request](#)
[Service Description](#)
[Safety Assessment](#)
[Audit](#)

Services Requested

9pt

I need a Flow Jo Seat and assistance with Phenotyping.

- Upon reviewing the Service Request and optionally discussing details and additional clarification offline with the customer, you can now add services and quantities to the Service Request. Select the Services Requested tab at the bottom and select Add New.

Services Requested    Repeat Services    Attachments

<input type="checkbox"/>	Service ID	Service Name	Billable	Actual Quantity	Project Title
<input type="checkbox"/>	ST-0000001485	Flow Jo Seat	\$	<input type="text" value="1"/>	PR-03744 (3020668_1R25-DA035133-01)
<input type="checkbox"/>	ST-0000001482	Phenotyping (Staff Assisted)	\$	<input type="text" value="1"/>	PR-03744 (3020668_1R25-DA035133-01)
<input type="checkbox"/>	ST-0000001481	Consumables	\$	<input type="text" value="1"/>	PR-03744 (3020668_1R25-DA035133-01)

Select Service - Google Chrome  
 Secure | https://dev.coreresearch.duke.edu/CR/rc?command=page  
 Select Service    Select & Return    Cancel

Search within the Id/Desc:     Search by a Query:

[ 0 selected ]    1 - 7 of 7    Group By: Core:

<input type="checkbox"/>	Service Task ID	Service Name	Type	Core	Major Service Name	Minor Service Name	Billable	Pass Thru?	Instr. Usage?	Tiered?
<input type="checkbox"/>	Core: DHVI: Flow Cytometry Facility (7)									
<input type="checkbox"/>	ST-0000001482	Phenotyping (Staff Assisted)	Service Task	DHVI: Flow Cytometry Facility	Laboratory Services	Phenotyping	\$		<input type="checkbox"/>	
<input type="checkbox"/>	ST-0000001484	Phenotyping (Independent)	Service Task	DHVI: Flow Cytometry Facility	Laboratory Services	Phenotyping	\$		<input type="checkbox"/>	
<input type="checkbox"/>	ST-0000001483	Sorting (Staff Assisted)	Service Task	DHVI: Flow Cytometry Facility	Laboratory Services	Sorting	\$		<input type="checkbox"/>	
<input type="checkbox"/>	ST-0000001480	Sorting (Independent)	Service Task	DHVI: Flow Cytometry Facility	Laboratory Services	Sorting	\$		<input type="checkbox"/>	
<input type="checkbox"/>	ST-0000001485	Flow Jo Seat	Service Task	DHVI: Flow Cytometry Facility	Laboratory Services	Software	\$		<input type="checkbox"/>	
<input type="checkbox"/>	ST-0000001479	Consulting/Training/Data Analysis	Service Task	DHVI: Flow Cytometry Facility	Laboratory Services	Consulting, Data Analysis, Training	\$		<input type="checkbox"/>	
<input type="checkbox"/>	ST-0000001481	Consumables	Service Task	DHVI: Flow Cytometry Facility	Pass Through	Consumables	\$	<input type="checkbox"/>		

- The selected service(s) will be placed in the Services Requested tab. Now, set the Actual Quantity for each service and select Save.

<input type="checkbox"/>	Service ID	Service Name	Billable	Actual Quantity	Project Title
<input type="checkbox"/>	ST-0000001485	Flow Jo Seat	\$	<input type="text" value="1"/>	PR-03744 (3020668_1R25-DA035133-01)
<input type="checkbox"/>	ST-0000001482	Phenotyping (Staff Assisted)	\$	<input type="text" value="1"/>	PR-03744 (3020668_1R25-DA035133-01)
<input type="checkbox"/>	ST-0000001481	Consumables	\$	<input type="text" value="1"/>	PR-03744 (3020668_1R25-DA035133-01)

8. Select Return

CoreResearch@Duke Estimate Management    Projects    Request For Service

Edit Service Request REQ-0000006739 Details

[Service Request](#)    [Billing Info](#)    [Parent Request](#)    [Service Description](#)    [Safety Assessment](#)    [Audit](#)

Services Requested

I need a Flow Jo Seat and assistance with Phenotyping.

Services Requested    Repeat Services    Attachments

<input type="checkbox"/>	Service ID	Service Name	Billable	Actual Quantity	Project Title
<input type="checkbox"/>	ST-0000001485	Flow Jo Seat	\$	<input type="text" value="1"/>	PR-03744 (3020668_1R25-DA035133-01)
					PR-03744

9. Select the Service Request to Approve and select Approve.

- Once the Service Request is Approved, work can begin on the request. Select the Service Request to be fulfilled and select Edit.

- The Edit Service Request page will display. Select the Services Performed tab at the bottom. Use the buttons on Services Performed to move each service through the service task life cycle.

PT	RP	Service ID	Service Name	#	Status	Assigned To	Fulfillment Date	Fulfilled By	Billable	Rate (\$)	Unit	Actual Quantity	Actual Cost (\$)	Billable Quantity	Billable Cost (\$)	Project Title	Membership	Affiliation	Invoice ID	Invoice Creation Date
		ST-0000001481	Consumables	1	Initial				\$	0	Each	1	.00	0	.00	PR-03744 (3020668_1R25-DA035133-01)	Duke			
		ST-0000001482	Phenotyping (Staff Assisted)	1	Initial				\$	143	Hour	1	143.00	0	.00	PR-03744 (3020668_1R25-DA035133-01)	Duke			
		ST-0000001485	Flow Jo Seat	1	Initial				\$	350	Each	1	350.00	0	.00	PR-03744 (3020668_1R25-DA035133-01)	Duke			

- Once a Service is Marked as ReadyForInvoice, it will be placed into an invoice.
- Invoices will be locked on the 1<sup>st</sup> of the following month and billed on the 3<sup>rd</sup> business day of the following month.
- Once all Services within a Service Request are either Cancelled or Billed, the Service Request is closed and moved to [Historical Service Requests](#).

## Updating actual and billable quantity for service requests

Actual and Billable quantity can be updated based on the following conditions:

Status	Update Actual Quantity	Update Billable Quantity
Initial	Yes	No
In Progress	Yes	No
Done	No	Yes
Ready for Invoice	No	No

Quantity updates for service tasks based on status. **Invoices must be in a status of "Initial" for services to be updated.**

1. Actual and Billable quantities can be updated from the Manage Service Requests page under the Request for Service tab.
2. To update billable quantity the user must select the Service Task (ST) and press the "Mark as Done" button. Once the billable quantity has been update the user will then save the service request.
3. If a user needs to update the actual quantity, the user would move the ST from Done to In Progress by pressing the "Mark as InProgress" button.

Services Requested

Services Requested | Services Performed | Repeat Services | Attachments

2

3

PT	RP	Service ID	Service Name	#	Status	Assigned To	Fulfillment Date	Fulfilled By	Billable	Rate (\$)	Unit	Actual Quantity	Actual Cost (\$)	Billable Quantity	Billable Cost (\$)	Project Title	Membership	Affiliation	Invoice ID	Invoice Creation Date
		ST-0000001481	Consumables	1	Done		Jul 2, 2018 1:58 PM	Angelica Morgan (alm90)	\$	0	Each	1	.00	1	.00	PR-03744 (3020668_1R25-DA035133-01)	Duke			
		ST-0000001482	Phenotyping (Staff Assisted)	1	Done		Jul 2, 2018 1:58 PM	Angelica Morgan (alm90)	\$	143	Hour	1	143.00	1	143.00	PR-03744 (3020668_1R25-DA035133-01)	Duke			
		ST-0000001485	Flow Jo Seat	1	Done		Jul 2, 2018 1:58 PM	Angelica Morgan (alm90)	\$	350	Each	1	350.00	1	350.00	PR-03744 (3020668_1R25-DA035133-01)	Duke			

Once a user has updated the actual or billable quantity they must move the ST back to the Ready for Invoice status. The update actual quantity feature requires the user to move the ST from InProgress→Done→Ready for Invoice. The update billable quantity requires a user to move the ST from Done→Ready for Invoice.

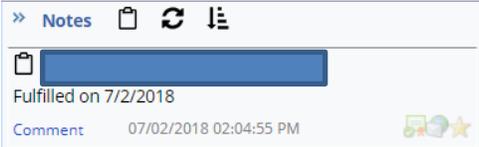
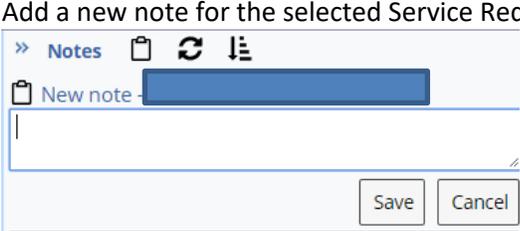
Services Requested   **Services Performed**   Repeat Services   Attachments   2

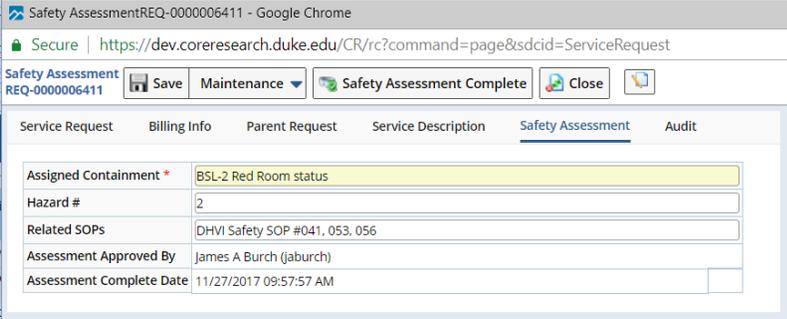
PT	RP	Service ID	Service Name	#	Status	Assigned To	Fulfillment Date	Fulfilled By	Billable	Rate (\$)	Unit	Actual Quantity	Actual Cost (\$)	Billable Quantity	Billable Cost (\$)	Project Title	Membership	Affiliation	Invoice ID	Invoice Creation Date
		ST-0000001481	Consumables	1	Done		Jul 2, 2018 1:58 PM	Angelica Morgan (alm90)		0	Each	1	.00	1	.00	PR-03744 (3020668_1R25-DA035133-01)	Duke			
		ST-0000001482	Phenotyping (Staff Assisted)	1	Done		Jul 2, 2018 1:58 PM	Angelica Morgan (alm90)		143	Hour	1	143.00	1	143.00	PR-03744 (3020668_1R25-DA035133-01)	Duke			
		ST-0000001485	Flow Jo Seat	1	Done		Jul 2, 2018 1:58 PM	Angelica Morgan (alm90)		350	Each	1	350.00	1	350.00	PR-03744 (3020668_1R25-DA035133-01)	Duke			

## Manage Service Requests List Page

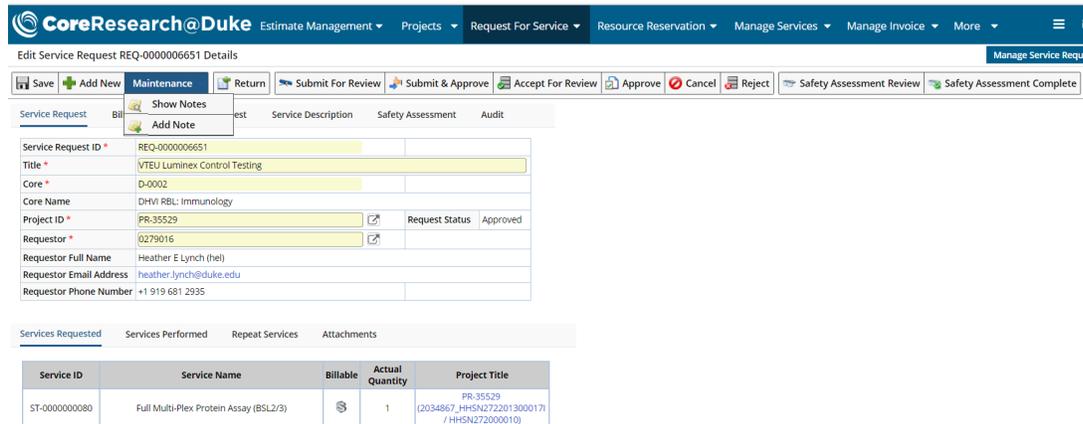
Service Request List

Request ID	Title	Investigator	Requestor	Submitted Date	Approved By	Approved Date	Account Number	Project Title	Project Status	Membership
PR-00856										
REQ-0000006666	Flowjo Site License	Approved		12/07/2017 02:00:01 PM	Patrice M McDermott (prcderm)	12/07/2017 02:00:01 PM				DHV: Flow Cytometry Facility Duke
PR-03744										
REQ-0000006739	New Test Request	Approved		07/02/2018 01:51:12 PM	Angelica Morgan (alm90)	07/02/2018 01:52:30 PM				Fund Expired DHV: Flow Cytometry Facility Duke

Operation	Description
Add New Request	Create a new Service Request with Initial Status. Displays the <a href="#">Service Request Maintenance Page</a> .
Add eForm Request	Create a new Service Request based on an eForm. Note: only applicable to some Cores
Edit	Edit details of an existing Service Request, including adding Service Tasks. Displays the <a href="#">Service Request Maintenance Page</a> .
View	Display the <a href="#">Service Request Maintenance Page</a> in Read-Only mode.
Delete	Delete the selected Service Request if there are no associated Service Tasks
Show Notes	Displays notes for the selected Service Request 
Add Note	Add a new note for the selected Service Request 
Submit and Approve	Update Service Request Status to Review from Initial
Submit for Review	Update Service Request Status from Initial to Pending Approval
Accept for Review	Update Service Request Status from Pending Approval to In Review
Approve	Update Service Request Status from Pending Approval or In Review to Approved

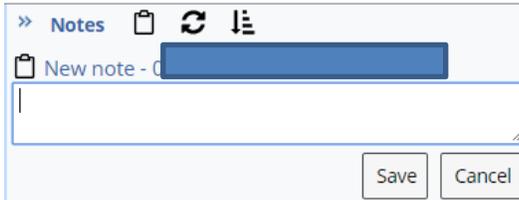
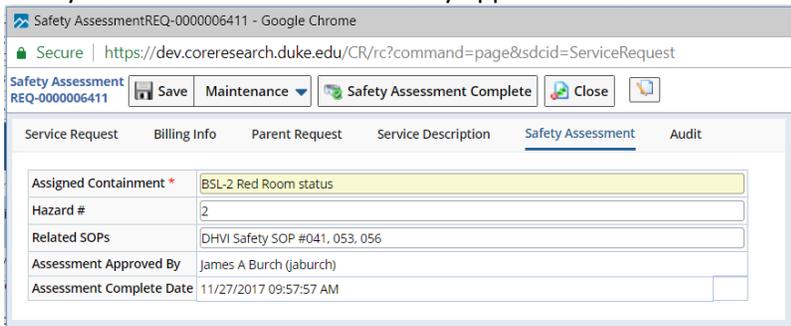
Cancel	Moves to the <a href="#">Historical Service Request Requests List page</a> and assigns a status of Cancelled
Reject	Update Service Request Status from Pending Approval or In Review to Rejected. Moves to the <a href="#">Historical Service Request Requests List page</a>
Safety Assessment Review	Displays Safety Assessment detail of Service Request Maintenance Page to complete Safety Review information. Note: only applicable to some Cores 
Safety Assessment Complete	Updates Safety Assessment status from Pending Review to Complete
View as PDF	Displays selected data values in PDF format (displays in new browser window)
View as Excel	Displays selected data values in Excel format (download)

## Service Request Management Maintenance Page



The screenshot shows the 'Edit Service Request REQ-000006651 Details' page. The top navigation bar includes 'CoreResearch@Duke' and various menu items like 'Estimate Management', 'Projects', 'Request For Service', etc. Below the navigation, there are several action buttons: Save, Add New, Maintenance, Return, Submit For Review, Submit & Approve, Accept For Review, Approve, Cancel, Reject, Safety Assessment Review, and Safety Assessment Complete. The main content area is divided into tabs: Service Request, Billing, Service Description, Safety Assessment, and Audit. The 'Service Request' tab is active, showing a form with fields for Service Request ID, Title, Core, Core Name, Project ID, Requestor, and Requestor Contact Information. Below the form, there is a table for 'Services Requested' with columns for Service ID, Service Name, Billable, Actual Quantity, and Project Title.

Operation	Description
Save	Save the updated or new data values
Add new	Create a new Service Request with Initial Status. Displays the <a href="#">Service Request Maintenance Page</a> .
Show Notes	Displays notes for the selected Service Request

	
Add Note	<p>Add a new note for the selected Service Request</p> 
Return	Displays the <a href="#">Service Requests List Page</a>
Submit for Review	Update Service Request Status from Initial to Pending Approval
Submit and Approve	Update Service Request Status to Review from Initial
Accept for Review	Update Service Request Status from Pending Approval to In Review
Approve	Update Service Request Status from Pending Approval or In Review to Approved
Cancel	Moves to the <a href="#">Historical Service Request Requests List page</a> and assigns a status of Cancelled
Reject	Update Service Request Status from Pending Approval or In Review to Rejected. Moves to the <a href="#">Historical Service Request Requests List page</a>
Safety Assessment Review	<p>Displays Safety Assessment detail of Service Request Maintenance Page to complete Safety Review information. Note: only applicable to some Cores</p> 
Safety Assessment Complete	Updates Safety Assessment status from Pending Review to Complete

## Services Requested Detail

Services Requested   Repeat Services   Attachments

<input type="checkbox"/>	Service ID	Service Name	Billable	Actual Quantity	Project Title
<input type="checkbox"/>	ST-000000082	sJTREC Analysis	\$	1	
<input type="checkbox"/>	ST-0000000512	Cell separation	\$	1	

Note: Operations are only available before the Service Request is Approved.

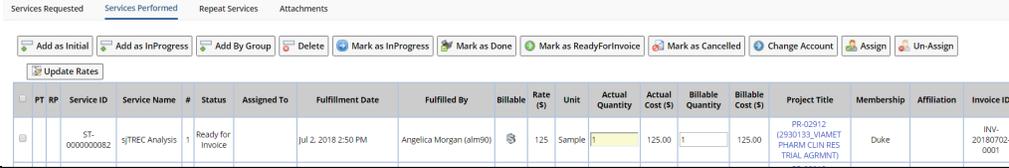
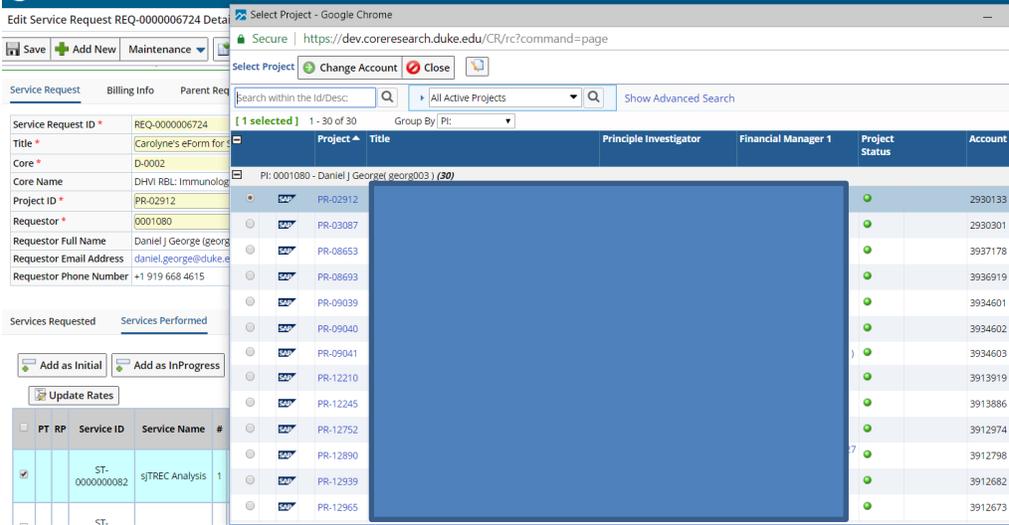
Operation	Description
Add New	<p>Displays the Service Task Look up to add a new Service Task to the Service Request</p>
Add By Group	Displays the Service Task Group Look up to add all Service Tasks within a selected Service Task Group to the Service Request
Delete	Removes the selected Service Task from the Service Request

## Services Performed Detail

Services Requested   **Services Performed**   Repeat Services   Attachments

<input type="checkbox"/>	PT	RP	Service ID	Service Name	#	Status	Assigned To	Fulfillment Date	Fulfilled By	Billable	Rate (\$)	Unit	Actual Quantity	Actual Cost (\$)	Billable Quantity	Billable Cost (\$)	Project Title	Membership	Affiliation	Invoice ID	Invoice Creation Date
<input type="checkbox"/>			ST-000000082	sJTREC Analysis	1	Initial				\$	125	Sample	1	125.00	0	.00		Duke			
<input type="checkbox"/>			ST-0000000512	Cell separation	1	Initial				\$	110	Sample	1	110.00	0	.00		Duke			

Operation	Description
Add as Initial	Displays the Service Task Look up to add a new Service Task to the Service Request

Add as In Progress	Displays the Service Task Group Look up to add all Service Tasks within a selected Service Task Group to the Service Request
Add By Group	Displays the Service Task Group Look up to add all Service Tasks within a selected Service Task Group to the Service Request
Delete	Removes the selected Service Task from the Service Request
Mark as In Progress	Updates the Service Task status from Initial to In Progress
Mark as Done	Updates the Service Task status from In Progress to Done
Mark as Ready for Invoice	Updates the Service Task status from Done to Ready for Invoice. Displays the new Invoice ID and the Invoice is viewable on the Invoices List Page. 
Mark as Cancelled	Updates the Service Task status to Cancelled and the Service Task will not be billed.
Change Account	Displays the Project look up page to update the Project for a selected Service Task to another Project for that PI. 
Assign	Displays the User look up to assign the Service Task to a Core staff member. Only applicable for Initial or In Progress Service Tasks.

The screenshot shows the 'Edit Service Request' page for request ID REQ-000006724. The form includes fields for Title, Core, Core Name, Project ID, Requestor, and Requestor Contact Information. A 'Services Requested' table is visible below the form. A 'User Lookup' dialog box is open, displaying a list of users with columns for NetID, Full Name, and Email. The 'User Lookup' dialog also includes search filters and a 'Select & Return' button.

**Un-assign** Clears the Assigned To data value for a selected Service Task.

**Update Rates** For Pass Thru Service Tasks Only. Allows for editing of the Service Name, Price and Quantity

The 'Update Service Name and Rates' dialog box contains a 'ServiceMap' table with the following data:

Service Name	Price/Unit(\$)	Quantity
Consumables	0	1

Buttons for 'Save', 'Close & Refresh', and a help icon are located at the top of the dialog.

## Repeat Services Detail

Repeat Service Tasks are Service Tasks that will be added the Service Request automatically by the system at a defined frequency.

The 'Repeat Services' tab shows a table of service tasks with the following data:

Service ID	Service Name	Billable	Actual Quantity	Unit	Start Date	End Date	Frequency	Turn On?
ST-000000080	Full Multi-Plex Protein Assay (BSL2/3)	<input checked="" type="checkbox"/>	1	Plate	Jul 2, 2018		Monthly	<input checked="" type="checkbox"/>

Operation	Description
Add New	Displays the Service Task Look up to add a new Repeat Service Task to the Service Request.
Delete	Removes the selected Service Task from the Service Request

## Attachments Detail

Useful for adding documents to the Service Request

Services Requested Services Performed Repeat Services Attachments (1)

Number	Description	View
1	attachment.docx	

[Manage](#)

Operation	Description
Manage	<p>Displays the Attachments manager to upload attachments.</p>

## Historical Service Requests List Page

CoreResearch@Duke Estimate Management Projects Request For Service Resource Reservation Manage Services Manage Invoice More

Historical Service Request List Manage Service Requests Historical Service Requests

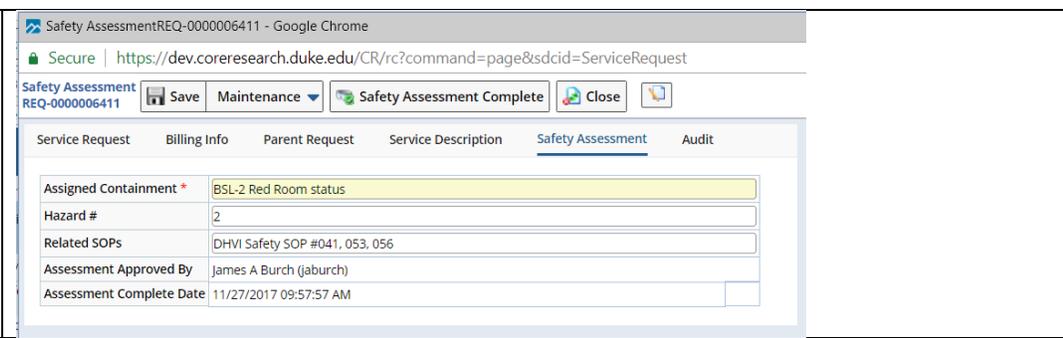
View List Control Safety Assessment Review Safety Assessment Complete Other Tasks

Search Show Notes Search By Query Show Advanced View as PDF

0 selected Add Note Group By: Project ID Selection Mode: All Pages View as Excel

Request ID	Title	Request Status	Principle Investigator	Requestor	Submitted Date	Approved By	Approved Date	Account Number	Project Title	Project Status
Project ID: PR-00464										
REQ-0000004723	Felix Mba Medie	Completed			07/21/2017 03:38:54 PM		07/24/2017 01:54:58 PM	2032220		
Project ID: PR-00561										
REQ-0000001092	Del Carpio/Tung Macaque SGE TruCulture (phase 2) Luminex	Completed			06/03/2016 03:36:48 PM		06/06/2016 12:04:12 PM	2032481		Fund Closed
Project ID: PR-00651										
REQ-0000001183	Nelson/Permar rHCMV602and503 cytokine luminex	Completed			06/15/2016 05:38:19 PM		06/16/2016 09:57:01 AM	2032510		Fund Closed

Operation	Description
View	Display the <a href="#">Service Request Maintenance Page</a> in Read-Only mode.
Show Notes	<p>Displays notes for the selected Service Request</p>
Add Note	<p>Add a new note for the selected Service Request</p>
Safety Assessment Review	Displays Safety Assessment detail of Service Request Maintenance Page to complete Safety Review information. Note: only applicable to some Cores

	
Safety Assessment Complete	Updates Safety Assessment status from Pending Review to Complete
View as PDF	Displays selected data values in PDF format (displays in new browser window)
View as Excel	Displays selected data values in Excel format (download)