

CoreResearch@Duke Service Requests User Guide

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.
- You will be presented with the <u>Service Request List Page</u> 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.



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.



Sav	📊 Save 💠 Add New 🛛 Maintenance 🗸 📑 Return 🛸 Submit For Review 🌲 Submit & Approve 🥃 Accept F											
Service Request Billing Info Parent Request Service Description Safety Assessment Audit												
ervic	e Request ID *	REQ-00	00006739									
itle *	r.	New Te	st Request	t								
ore *	*	D-0059										
ore N	Name	DHVI: FI	ow Cytom	etry Facility								
rojec	ct ID *	PR-0374	14			2	R	equest Status	Initial			
eque	estor *											
eque	estor Full Name											
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eque eque ervice	estor Full Name estor Email Addre estor Phone Num es Requested Add New Service ID	ss ber Repeat Ser Add By Gro	vices	Attachments Delete Service Name		Billable	Actua Quanti	il Proj	ject Title			
eque eque ervice	estor Full Name estor Email Addre estor Phone Num es Requested Add New Service ID ST-000001485	ss ber Repeat Ser Add By Gro	vices up	Attachments Delete Service Name Flow Jo Seat		Billable	Actua Quanti 1	il Proj	ject Title			
eque eque ervice	estor Full Name estor Email Addre estor Phone Num es Requested Add New Service ID ST-000001482	ss ber Repeat Ser Add By Gro	vices up	Attachments Delete Service Name Flow Jo Seat yping (Staff As:	sisted)	Billable S S	Actua Quanti 1	il Proj	ject Title			

Service Request	Billing Info	Parent Request	Service Description	Safety Assessment	Audit

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	I need	a Flow .	Jo Seat	and as	sistance	e with P	henoty	ping.							
Services Requested															

5. 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.



Service	Services Requested Repeat Services Attachments									
Add New Add By Group Delete										
	Service ID	Service Name	Billable	Actual Quantity	Project Title					
	ST-0000001485	Flow Jo Seat	\$	1	PR-03744 (3020668_1R25-DA035133- 01)					
	ST-0000001482	Phenotyping (Staff Assisted)	\$	1	PR-03744 (3020668_1R25-DA035133- 01)					
	ST-0000001481	Consumables	\$	1	PR-03744 (3020668_1R25-DA035133- 01)					

🔀 S	🔀 Select Service - Google Chrome 📃 🗌												
Secure https://dev.coreresearch.duke.edu/CR/rc?command=page													
Select Service 💱 Select & Return 🧭 Cancel													
Sea	rch within the Id/Desc:	Q Search by a Quer	y:	▼ Q									
[0 s	elected] 1-7 of 7	Group By Core:	•										
= =	Service Task ID	Service Name	Туре	Core	Major Service Name	Minor Service Name	Billable	Pass Thru?	Instr. Usage?	Tiered?			
	Core: DHVI: Flow Cyto	metry Facility (7)											
	ST-000001482	Phenotyping (Staff Assisted)	Service Task	DHVI: Flow Cytometry Facility	Laboratory Services	Phenotyping	\$		ø				
	ST-0000001484	Phenotyping (Independent)	Service Task	DHVI: Flow Cytometry Facility	Laboratory Services	Phenotyping	\$		ø				
	ST-0000001483	Sorting (Staff Assisted)	Service Task	DHVI: Flow Cytometry Facility	Laboratory Services	Sorting	\$		ø				
	ST-0000001480	Sorting (Independent)	Service Task	DHVI: Flow Cytometry Facility	Laboratory Services	Sorting	\$		#				
	ST-0000001485	Flow Jo Seat	Service Task	DHVI: Flow Cytometry Facility	Laboratory Services	Software	\$						
	ST-0000001479	Consulting/Training/Data Analysis	Service Task	DHVI: Flow Cytometry Facility	Laboratory Services	Consulting, Data Analysis, Training	\$						
	ST-0000001481	Consumables	Service Task	DHVI: Flow Cytometry Facility	Pass Through	Consumables	\$	3					

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



Service	Services Requested Repeat Services Attachments										
•	Add New										
	Service ID	Service Name	Billable	Actual Quantity	Project Title						
	ST-0000001485	Flow Jo Seat	\$	1	PR-03744 (3020668_1R25-DA035133- 01)						
	ST-0000001482	Phenotyping (Staff Assisted)	\$	1	PR-03744 (3020668_1R25-DA035133- 01)						
	ST-0000001481	Consumables	\$	1	PR-03744 (3020668_1R25-DA035133- 01)						

8. Select Return

@ c	oreRe	sea	rcł	1@	Du	ke	Esti	imate	Manag	gement 🔻	Pro	ojects	; 🔻	Req	uest Fo	r Service
Edit Se	rvice Reques	st REQ-	00000	0673	9 Det	ails		_								
🗖 Sav	e 🛉 Add Ne	ew M	ainten	ance	•	👕 Ret	urn	🧫 S	ubmit	For Review	r 🌛 s	Submi	it & A	pprov	e 🛃 A	ccept For
Service	Request	Billing I	Info	Par	ent Re	equest		Service	Descri	ption	Safety /	Assess	ment	A	udit	
		\$	В	I	Ū	E	Ξ	∃	■	9pt		• <u>/</u>	<u>q</u> -	:=	- 1 <u>=</u>	• <u>=</u>
Servic	es Requested		a Flow 3						Jugang.							
Service	es Requested	Rep	eat Ser	vices	A	ttachm	nents									
•	Add New															
	Service ID				Ser	rvice N	ame			Billabl	e A Qu	ctual antity	,	Pr	oject Tit	:le
	ST-000000148	85			FI	ow Jo S	eat			\$	1		(3	F 020668	R-03744 1R25-D 01)	A035133-
														F	R-03744	

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



CoreResearch@Duke Estin	nate Managemer	nt 👻 Projects 👻	Request For Service	- Resource F	Reservation 🔻	Manage Se
Service Request List						
🕂 Add New Request 🔋 Add eForm Request 🖏 Edit	List Control 🔻	Submit & Approve	🗫 Submit For Reviev	/ 差 Accept For	Review 👌 Ap	oprove 🥝 Cai
Search Q Search By Query	- Q	Show Advanced Sea	arch			Move from In Re
[1 selected] 1 - 5 of 5 Group By Project ID:	•					
🗖 📕 Request ID 🔺 🧤 Title	Request Status	Principle Investigator	Requestor	Submitted Date	Approved By	Approved Date
Project ID: PR-00856 -						
Project ID: PR-03744 -						
REQ-0000006739 New Test Request	Pending Approval			07/02/2018 01:51:12 PM		

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

() Core Rese	earch@Duke Estin	mate Manageme	nt 🕶 Projects 👻 R	equest For Service	 Resource F 	Reservation 🔻	Manage Serv	<i>v</i> ices ▼ Manaį	ge Invoice 🔻 Mor
Service Request List									
🕂 Add New Request	🖡 Add eForm Request 🏾 🏹 Edit	List Control 🔻	🗼 Submit & Approve	🗫 Submit For Review	w 🛃 Accept For	Review 🛃 A	pprove 🥝 Cance	el 👼 Reject 🔍	😙 Safety Assessment
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🖃 📃 Project ID: PR-00856 -									
REQ-0000006666	FlowJo Site License	Approved			12/07/2017 02:00:01 PM		12/07/2017 02:00:01 PM	2033065	177
🖃 🔍 Proje									
REQ-0000006739	New Test Request	Approved			07/02/2018 01:51:12 PM		07/02/2018 01:52:30 PM	3020668	

11. 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.

Services Requested Services Performed Repeat Services Attachments																					
[Add as Initial 📮 Add as InProgress 🗧 Add By Group 🕞 Delete 😨 Mark as InProgress 🚿 Mark as Done 🕲 Mark as ReadyForInvoice 🔊 Mark as Cancelled 💿 Change Account 🍰 Assign 💰 Un-Assign																				
C	P	T 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
(8	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				8	143	Hour	1	143.00	0	.00	PR-03744 (3020668_1R25- DA035133-01)	Duke			
(ST- 0000001485	Flow Jo Seat	1	Initial				8	350	Each	1	350.00	0	.00	PR-03744 (3020668_1R25- DA035133-01)	Duke			

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

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.

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Edit Se	rvice	Request RE	Q-0000006739 D	etai	ils													Manage Se	rvice Requests	Historical	Service Requ
📊 Save	•	Add New	Maintenance 🔻		Return	accept Fo	r Review 📄 Approve 🄇	🖉 Cance	el 👼 Reject 🖙	Safety A	ssessm	nent Rev	view 😼 Sat	fety Asse	ssment Com	olete					
Servic	es Req	uested																			
Service	s Requ	ested S	ervices Performed		Repeat Se	ervices Atta	chments														
_				_					2												
- /	Add as	Initial 🥛	Add as InProgree	5S	add 🖓	By Group 🗧	Delete 😔 Mark as InP	Progress	Mark as Done	e 🌖 N	lark as	Readyl	ForInvoice	🔊 Marl	k as Cancelle	d 🜖 Ch	ange Account	🔒 Assign 🏻 🔒	Un-Assign		
100	Upd	ate Rates													3						
P	T 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	4 Invoice ID	Invoice Creation Date
1	2	ST- 0000001481	Consumables	1	Done		Jul 2, 2018 1:58 PM	🖬 An	gelica 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	🖬 An	gelica 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	E An	gelica 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 \rightarrow Done \rightarrow Ready for Invoice. The update billable quantity requires a user to move the ST from Done \rightarrow Ready for Invoice.



Se	vices Re	uested Se	rvices Performed		Repeat Se	ervices Atta	chments													
[F Add	as Initial 📮 date Rates	Add as InProgres	s	두 Add	By Group	Delete	ess 谢 Mark as Done	e 📀 N	lark as	2 Ready	ForInvoice	🗟 Marl	as Cancelled	🜖 Cha	ange Account	Assign 🔒	Un-Assign		
C	PTR	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
i	1	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			
1		ST- 0000001482	Phenotyping (Staff Assisted)	1	Done		Jul 2, 2018 1:58 PM	Angelica Morgan (alm90)	8	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

CoreResearch@Duke Estin	mate Management 🔻	Projects 👻 R	equest For Service 🖣	Resource R	eservation 👻	Manage Serv	ices 👻 Man	age Invoice 🔻 More 🔻		≡ ≊	n (6 AM -
Service Request List									Manage Servio	e Requests Histo	rical Ser	vice Requests
🕂 Add New Request 📑 Add eForm Request 🕥 Edit	List Control 🔹 🌲	Submit & Approve	🗫 Submit For Review	accept For	Review 🔁 Aj	pprove 🥝 Cance	el 👼 Reject	🐨 Safety Assessment Revi	ew Safety As	ssessment Comple	te 🕶	•
Search Q Search By Query	🔒 View	now Advanced Sear	ch								De	etails 🔻
[0 selected] 1-5 of 5 Group By Project ID:	X Delete	_								🛐 View as PDF	0	ther Tasks
🗖 📕 Request ID 🔺 🧤 Title	Show Notes	iple Investigator:	Requestor	ubmitted Date	Approved By	Approved Date	Account Numb	er Project Title	Project d	3 View as Excel		Membershijp
Project ID: PR-00856	Auu Note											
REQ-0000006666 Flow/jo Site License	Approved j			2/07/2017 2:00:01 PM	Patrice M McDermott(pmcderm)	12/07/2017 02:00:01 PM		j.	•	DHVI: Flow Cyte Facility	ometry	Duke
Project ID: PR-03744												
REQ-0000006739 New Test Request	Approved i			07/02/2018 01:51:12 PM	Angelica Morgan(alm90)	07/02/2018 01:52:30 PM			 Fun Expi 	d DHVI: Flow Cyte Facility	ometry	Duke

Operation	Description
Add New	Create a new Service Request with Initial Status. Displays the Service Request
Request	Maintenance Page.
Add eForm	Create a new Service Request based on an eForm. Note: only applicable to some Cores
Request	
Edit	Edit details of an existing Service Request, including adding Service Tasks. Displays the
	Service Request Maintenance Page.
View	Display the Service Request Maintenance Page in Read-Only mode.
Delete	Delete the selected Service Request if there are no associated Service Tasks
Show	Displays notes for the selected Service Request
Notes	» Notes 📋 🔁 崖
	Fulfilled on 7/2/2018
	Comment 07/02/2018 02:04:55 PM
Add Note	Add a new note for the selected Service Request
	» Notes 🖞 🗸 崖
	P New pote
	Save Cancel
Submit and	Update Service Request Status to Review from Initial
Approve	
Submit for	Update Service Request Status from Initial to Pending Approval
Review	
Accept for	Update Service Request Status from Pending Approval to In Review
Review	
Approve	Update Service Request Status from Pending Approval or In Review to Approved



Cancel	Noves to the <u>Historical Service Request Requests List page</u> and assigns a status of Cancelled												
Pajact	Undate Service Request Status from Pending Approval or In Review to Rejected Moves												
Reject	to the Historical Carries Derivert Deriverts list needs												
	to the <u>Historical Service Request Requests List page</u>												
Safety	Displays Safety Assessment detail of Service Request Maintenance Page to complete												
Assessment	Safety Review information. Note: only applicable to some Cores												
Review	Safety AssessmentREQ-0000006411 - Google Chrome												
	Secure https://dev.coreresearch.duke.edu/CR/rc?command=page&sdcid=ServiceRequest												
	Safety Assessment REQ-0000006411 Save Maintenance V 👒 Safety Assessment Complete <table-cell></table-cell>												
	Service Request Billing Info Parent Request Service Description Safety Assessment Audit												
	Assigned Containment * BSL-2 Red Room status												
	Hazard # 2												
	Related SOPs DHVI Safety SOP #041, 053, 056												
	Assessment Approved By James A Burch (jaburch)												
	Assessment Complete Date 11/27/2017 09:57:57 AM												
Safety	Updates Safety Assessment status from Pending Review to Complete												
Assessment													
Complete													
View as	Displays selected data values in PDF format (displays in new browser window)												
PDF													
View as	Displays selected data values in Excel format (download)												
Excel													

Service Request Management Maintenance Page

(CoreReso	earch@Duke Est	timate Manageme	nt 👻 🛛 Pi	rojects 🛨 Re	quest For Se	ervice 🔻	Resource Res	ervation 👻	Manage	Services 👻	Manage Invoice	👻 More		= •
Edit Service Request RE	Q-0000006651 Details												Manage Sen	vice Reque
📊 Save 🜵 Add New	Maintenance	🗫 Submit For Re	view 🌛 S	Submit & Approv	e 🛃 Accept	t For Reviev	v 🛃 Approve	🧭 Cancel	and Reject	🐨 Safety As	ssessment Review	🧝 Safety A	sessment Co	mplete
Service Request Bil	없 Show Notes est : 같 Add Note	Service Description	Safety A	Assessment A	udit									
Service Request ID *	REQ-000006651													
Title *	VTEU Luminex Control Testing													
Core *	D-0002													
Core Name	DHVI RBL: Immunology													
Project ID *	PR-35529		C I	Request Status	Approved									
Requestor *	0279016		ß											
Requestor Full Name	Heather E Lynch (hel)													
Requestor Email Address	heather.lynch@duke.edu													
Requestor Phone Number	+1 919 681 2935													
Services Requested S	ervices Performed Repeat Se	rvices Attachme	ents											
Service ID	Service Name	Billable	Actual Quantity	Project	t Title									
ST-000000080	Full Multi-Plex Protein Assay (BSL2	2/3) 💲	1	PR-35 (2034867_HHSN) / HHSN27	529 272201300017 2000010)	1								

Operation	Description
Save	Save the updated or new data values
Add new	Create a new Service Request with Initial Status. Displays the Service Request
	Maintenance Page.
Show	Displays notes for the selected Service Request
Notes	



	» Notes 🖞 🗶 🛓
	Test EStimate
	Comment 10/04/2017 01:33:43 PM
Add Note	Add a new note for the selected Service Request
	» Notes 🖞 📿 崖
	🖞 New note - 0
	Save Cancel
	Save
Return	Displays the Service Requests List Page
Submit for	Update Service Request Status from Initial to Pending Approval
Review	
Submit and	Update Service Request Status to Review from Initial
Approve	
Accept for	Update Service Request Status from Pending Approval to In Review
Review	
Approve	Update Service Request Status from Pending Approval or In Review to Approved
Cancel	Moves to the Historical Service Request Requests List page and assigns a status of
	Cancelled
Reject	Update Service Request Status from Pending Approval or In Review to Rejected. Moves
	to the <u>Historical Service Request Requests List page</u>
Safety	Displays Safety Assessment detail of Service Request Maintenance Page to complete
Assessment	Safety Review information. Note: only applicable to some Cores
Review	A Safety AssessmentREQ-0000006411 - Google Chrome
	Secure https://dev.coreresearch.duke.edu/CR/rc?command=page&sdcid=ServiceRequest
	Safety Assessment REQ-0000006411 Save Maintenance V Safety Assessment Complete 2 Close
	Service Request Billing Info Parent Request Service Description Safety Assessment Audit
	Assigned Containment * BSL-2 Red Room status
	Hazard # 2
	Related SOPs DHVI Safety SOP #041, 053, 056
	Assessment Approved By James A Burch (Jaburch)
Safety	Updates Safety Assessment status from Pending Review to Complete
Assessment	
Complete	
complete	



Services Requested Detail

S	ervice	s Requested	Repeat Services Attachments			
	•	Add New	dd By Group			
		Service ID	Service Name	Billable	Actual Quantity	Project Title
		ST-000000082	sjTREC Analysis	\$	1	
		ST-000000512	Cell separation	\$	1	

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

Operation	Description	escription												
Add New	Displays the S	Service Task	Look up to	add a new S	ervice Tas	k to the Service R	equest							
- 🖂 Select Service - Google Chrome														
	Secure https://dev.coreresearch.duke.edu/CR/rc?command=page													
	Select Service 💱 Select & Return 🥝 Cancel													
	Bearch Q Search By Query													
	[0 selected] 1 - 7 of 7	[0 selected] 1-7 of 7 Group By Core:												
	🗖 🔳 Service Task ID	Service Name	Type Core	Major Service Name	Minor Service									
	Core: DHVI: Flow Cyt	Core: DHVI: Flow Cytometry Facility (7)												
	ST-0000001482	Phenotyping (Staff Assisted)	DHVI: Service Flow Task Cytometry Facility	Laboratory Services	Phenotypin									
	ST-0000001484	ST-0000001484 Phenotyping (Independent) Task Cytometry Facility Facility												
	ST-0000001483	ST-0000001483 Sorting (Staff Assisted) DHVI: Service Flow Task Cytometry Facility												
	ST-0000001480	ST-0000001480 Sorting (Independent) DHVI: Service Flow Facility Laboratory Services Sorting												
	•	- -			•									
Add By	Displays the S	Displays the Service Task Group Look up to add all Service Tasks within a selected												
Group	Service Task	Service Task Group to the Service Request												
Delete	Removes the	noves the selected Service Task from the Service Request												

Services Performed Detail

Services Requested Services Performed Repeat Services Attachments

-	Add as	s Initial 두 / ate Rates	Add as InProgress		ଟ Add By	Group 📴 Del	ete 💿 Mark as InProgr	ress 靜 Mark	as Done	0	Aark as F	teadyForInvo	ice 🛃	Mark as Can	celled	Change Account	Assign	Un-Assign	
	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
		ST- 0000000082	sjTREC Analysis	1	Initial				\$	125	Sample	1	125.00	0	.00		Duke		
		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

Invoice Creation Date



Add as in	Displays the Service Task Group Look up to add all Service Tasks within a selected									
Progress	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 Tas	sk Group 1	to the	e Serv	ice Reques	st				
Delete	Removes t	he selecte	ed Se	rvice ⁻	Task from	the Servic	e Request			
Mark as In	Updates th	ne Service	Task	statu	s from Init	ial to In Pr	rogress			
Progress							-0			
Mark as Done	Undates th	ne Service	Task	statu	s from In F	Progress to	Done			
Mark as Beady	Undates th	ne Service	Tack	statu	s from Do	he to Read	ly for Invoi	ce Displa	vs the	new
for Invoice		and the Ir	voice		s nom Doi wahla an	the Invoic	oc List Dog		ys the	new
	Services Requested Service	es Performed Repeat Ser	rvices Attac	thments			es List rag	с.		
	Add as Initial	d as InProgress 🚽 Add B	by Group 🔓 I	Delete 💿 Ma	rk as InProgress 谢 Mark as	Done 💿 Mark as ReadyF	orInvoice 😹 Mark as Cance	lled 📀 Change Account	👶 Assign 🔒	Un-Assign
	🔯 Update Rates									
	PT RP Service ID Se	ervice Name # Status	Assigned To	Fulfillment D	ate Fulfilled By	Billable Rate Unit Q	Actual Actual Billable uantity Cost (\$) Quantity	Billable Cost (\$) Project Title	Membership	Affiliation Invoice ID
	ST- 0000000082 sj7	TREC Analysis 1 Ready for Invoice		Jul 2, 2018 2:50 PN	Angelica Morgan (alm9)) 🖏 125 Sample 1	125.00 1	125.00 (2930133_VIAMET PHARM CLIN RES TRIAL AGRMNT)	Duke	INV- 20180702- 0001
Mark as	Updates th	ne Service	Task	statu	s to Cance	lled and tl	he Service	Task will r	ot be	billed.
Cancelled										
Change	Displays th	e Project	look	up pa	ge to upda	ate the Pro	piect for a s	selected S	ervice	Task
	Displays the Project look up page to update the Project for a selected Service Task									
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	Title *	Carolyne's eForm for :	· · · ·	NetID	Full Name	Email				
	Core *	D-0002	Search multiple NetIDs: ^	lahti001	Cherie Lahti (lahti001)	cherie.lahti@duke.edu				
	Core Name D	DHVI RBL: Immunolog	Add New	kriebe	Kristina Riebe (kriebe)	rlebe002@mc.duke.edu				
	Project ID *	PR-02912	Q	sempo001	Gregory D Sempowski (sempo001)	greg.sempowski@duke.edu				
	Requestor *	0001080	Clear	hel	Heather E Lynch (hel)	heather.lvnch@duke.edu				
	Requestor Full Name E	Daniel J George (georg daniel george@duke e		msamo	Melissa Samo (msamo)	melissa.samo@duke.edu				
	Requestor Phone Number +	+1 919 668 4615		o dict1	Christopher I Chin (cic11)	cic11@duke.edu				
				ira16	Jared R Atherton (jra16)	jared.atherton@duke.edu				
	Services Requested Serv	vices Performed		imr46	loseph M Rusnak (imr46)	ioseph.m.rusnak@duke.edu				
				Caw34	Carolyne A Whiting (caw34)	carolyne.whiting@duke.edu				
	add as Initial 🗧 🗸	Add as InProgress		dm170	Darlene McCain (dm170)	darlene.mccain@duke.edu				
	😺 Update Rates			am277	Andrew MacIntyre (am277)	a.n.macintyre@duke.edu				
				pm107	Paul Morrow (pm107)	paul.morrow@duke.edu				
	PT RP Service ID	Service Name #		alm90	Angelica Morgan (alm90)	angelica morgan@duke.edu				
				iko14	Johanna K O'Dell (ko14)	iohanna odell@duke.edu				
	ST- 0000000082 sjTREC Analysis 1			ikg22	Jeremy K Guill (ikg22)	jeremy guill@duke.edu				
				 ec764 	Samir Sabu (sc764)	samirs@lahvantage.com				
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	X Servicemup									
	Service Nam	ne	Price/Unit(\$)	Quantity	,					
	Consumable	s	b							
		1	P	1						

Repeat Services Detail

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

Service	es Requested Services	Performed Repeat Se	rvices	Attachmen	ts				
•	Add New OPlete								
	Service ID	Service Name	Billable	Actual Quantity	Unit	Start Date	End Date	Frequency	Turn On?
	ST-000000080	Full Multi-Plex Protein Assay (BSL2/3)	•	1	Plate	Jul 2, 2018		Monthly	

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



Service	es Requested	Services Performed	Repeat Services	Attachments (
	Number	Description		
	1	attachment.docx		

📑 Manage

Operation	Description							
Manage	Displays the Attachments manager to upload attachments.							
	Shttps://dev.coreresearch.duke.edu/CR/rc?command=page - Google Chrome							
	Secure https://dev.coreresearch.duke.edu/CR/rc3command=page							
	Attachment Manager 🔣 Save * 🔀 Close							
	Service Request Individual attachment file size limit is 1990. Upboding an attachment krager than 10HB will BAttachments (0)							
	Number Description Type File							
	(auto) lattachment.docx Upload & Reference Choose File attachment.docx Gil Shared Resources							
	Add New Delete							

Historical Service Requests List Page

CoreResearch@Duke Estimate Management - Projects ·	 Request For Service 	▼ Resource Reservation ▼	Manage Services	s 👻 Manage Invoice	· ▼ More ▼	= =	* n° (i)	AM -
Historical Service Request List					Man	age Service Requests	Historical Service	e Requests 🛱
🕞 View List Control 🖙 Safety Assessment Review Safety Assessment Complete Ot	Other Tasks							
Search Add Note Search By Query Q. Show Advan [0 selection Add Note Group By [Project ID: Selection Mode [All Pages	View as PDF View as Excel							
🗆 🔳 Request ID 🛧 😽 🏷 Title Reque	est Status Principle Inve	stigator Requestor S	Submitted Date App	proved By Approved Da	te Account Numbe	r Project Title	Projec Statu	t C
Project ID: PR-00464								
Compl	pleted	× a	07/21/2017 03:38:54 PM	07/24/2017 01:54:58 PM	2032220		•	
🖃 🔍 Project ID: PR-00561								
REQ-0000001092 Carplo/Tung Macaque SGE TruCulture (phase 2) Luminex Compl	pleted		06/03/2016 03:36:48 PM	06/06/2016 12:04:12 PM	2032481		٠	Fund Closed
🖃 🔍 Project ID: PR-00651								
REQ-0000001183 👒 👩 Nelson/Permar rhCMV602and603 cytokine luminex Compl	pleted		06/15/2016 05:38:19 PM	06/16/2016 09:57:01 AM	2032510	TANENT	•	Fund Closed

Operation	Description
View	Display the Service Request Maintenance Page in Read-Only mode.
Show	Displays notes for the selected Service Request
Notes	» Notes 🖞 🗶 🗄
	Test EStimate
	Comment 10/04/2017 01:33:43 PM
Add Note	Add a new note for the selected Service Request
	» Notes 📋 🔁 🖺
	🗂 New note - C
	4
	Save
Safety	Displays Safety Assessment detail of Service Request Maintenance Page to complete
Accord	Safety Paview information. Note: only applicable to some Cores
Assessment	Safety Review information. Note: only applicable to some cores
Review	

View

	- 🔀 Safety AssessmentREQ-0000006411 - Google Chrome					
	Secure https://dev.com	reresearch.duke.edu/CR/rc?command=page&sdcid=ServiceRequest				
	Safety Assessment REQ-0000006411 Save	Maintenance 👻 👒 Safety Assessment Complete 😺 Close				
	Service Request Billing In	fo Parent Request Service Description Safety Assessment Audit				
	Assigned Containment *	BSL-2 Red Room status				
	Hazard #	2				
	Related SOPs	DHVI Safety SOP #041, 053, 056				
	Assessment Approved By	ames A Burch (jaburch)				
	Assessment Complete Date 1	11/27/2017 09:57:57 AM				
Safety	Updates Safety A	ssessment status from Pending Review to Complete				
Assessment						
Complete						
View as	Displays selected data values in PDF format (displays in new browser window)					
PDF						
View as	Displays selected	l data values in Excel format (download)				
Excel						