

DUKE MEDICINE



CoreResearch@Duke External User Reservations User Guide

7/11/18
Version 2.0

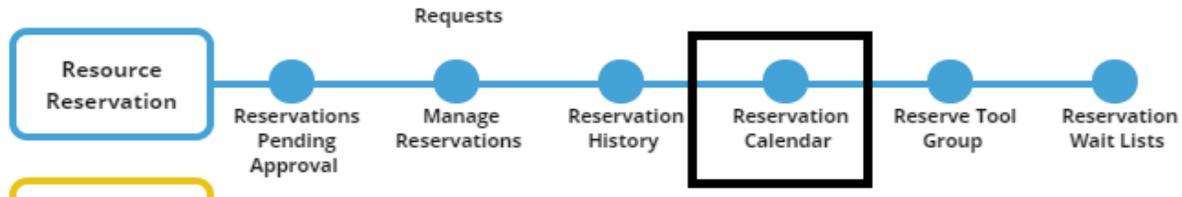
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Reservation Creation

How to create a reservation

1. LOGIN to CoreResearch@Duke.
2. Click on the Reservation Calendar tramstop, located on the “Resource Reservation” tramline.



3. Select the Core with which you want to make your reservation with from the drop-down. In addition, select your group and calendar view.
4. Select the date you need the reservation by using the calendar navigation options and either clicking and dragging or double clicking on the desired timeslot on the date and time grid. Note: Some instruments require certification in order to make a reservation. If you are not certified on the selected instrument, you will receive an error message and will not be allowed to proceed with the reservation. Contact the Core Manager to learn more about the certification process for the selected instrument.

5. Click ‘Check Availability’ to make sure that the selected slot is available.

Resource Reservation Event

Reservation Save Check Availability Close Submit For Approval

Reservation Billing Info Usage Check Availability Assessment

Life Cycle	
Instrument	Leica SP5 upright confocal - Nan Duke
Reservation ID	(Auto) Status Initial
Core	Light Microscopy Core Facility (LMCF)
Private?	<input type="checkbox"/>
Project Name	Project ID * <input type="text"/>
Reserved By Name	Reserved By Unique ID <input type="text"/>
Reserved For Name	Reserved For Unique ID * <input type="text"/>
Reserved For Phone	Reserved For Email <input type="text"/>
Reservation Start Time	Reservation Start Date * 07/11/2018 <input type="text"/>
Reservation End Time	Reservation End Date * 07/11/2018 <input type="text"/>
Activity	
Location	Assistance required ? <input type="radio"/> Yes <input checked="" type="radio"/> No
Repeat required ?	Repeat Type <input type="text"/>
Repeat End Date	Repeat Every <input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday
Parent Request ID	<input type="text"/>
Experiment Information	<input type="text"/>

- Fill in all the mandatory fields highlighted in yellow. Note: "Activity" may or may not be required depending on the instrument selected.
- If training or assistance is needed for the reservation, choose the Activity "with Assistance", and for "Assistance required?" select 'Yes'.

Resource Reservation Event

Reservation Save Check Availability Close Submit For Approval

Reservation | Billing Info | Usage Log | Safety Assessment

Life Cycle			
Instrument	Ocean Optics		
Reservation ID	(Auto)	Status	Initial
Core	Optical Molecular Imaging and Analysis		
Private?	<input type="checkbox"/>	Project ID *	<input type="text"/>
Project Name		Reserved By Unique ID	0646124
Reserved By Name	Angelica Morgan (alm90)	Reserved For Unique ID *	0646124
Reserved For Name	Angelica Morgan (alm90)	Reserved For Email	
Reserved For Phone	+1 919 613 0534	Reservation Start Date *	07/11/2018
Reservation Start Time	3 AM	Reservation End Date *	07/11/2018
Reservation End Time	2 AM		
Activity	<input type="text"/>	Assistance required ?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Location	<input type="text"/>	Repeat Type	<input type="text"/>
Repeat required ?	<input type="checkbox"/>	Repeat Every	<input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday
Repeat End Date	<input type="text"/>		
Parent Request ID	<input type="text"/>		
Experiment Information	<input type="text"/>		

- Click 'Save'. The screen will refresh with new buttons available at the top. Click 'Submit For Approval'.

Resource Reservation Event

Reservation Save Modify Reservation Close Cancel Reservation Submit For Approval

Reservation | Billing Info | Usage Log | Safety Assessment

Life Cycle	1. Initial/Cancelled/Rejected	2. Pending Approval	3. Approved	4. Completed
	Next, Submit for Approval			

Instrument	Ocean Optics		
Reservation ID	RES-0000146267	Status	Initial
Core	Optical Molecular Imaging and Analysis		
Private?	<input type="checkbox"/>	Project ID *	PR-54225
Project Name	Test Project for Jared Atherton (jra16) as PI and FM - Fund	Reserved By Unique ID	<input type="text"/>
Reserved By Name	<input type="text"/>	Reserved For Unique ID *	<input type="text"/>
Reserved For Name	<input type="text"/>	Reserved For Email	<input type="text"/>
Reserved For Phone	<input type="text"/>	Reservation Start Date *	07/11/2018
Reservation Start Time	06:00 PM	Reservation End Date *	07/11/2018
Reservation End Time	06:30 PM		
Activity *	<input type="text"/>	Assistance required ?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Location	<input type="text"/>	Repeat Type	<input type="text"/>
Repeat required ?	<input type="checkbox"/>	Repeat Every	<input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday
Repeat End Date	<input type="text"/>		
Parent Request ID	<input type="text"/>		
Experiment Information	<input type="text"/>		

Services Performed | Attachments

- If the resource group item is set for automatic approval, your reservation will automatically be approved, otherwise you will be notified via email when your reservation has been approved by core staff.

Reservation Modification

How to modify a reservation (prior to reservation start time)

- Double click on the reservation from the Reservation Calendar.

- Select the Modify Reservation button and update the Start Date/Time and End Date/Time as desired. Select Save.

Resource Reservation Event

Reservation **Modify Reservation** Maintenance Stop Start Extend Reduce Cancel Reservation Update Actual Usage Close

Reservation Billing Info Usage Log Safety Assessment

Life Cycle: **1. Initial/Cancelled/Rejected**

Tool Group Reservation?

Instrument: Ocean Optics

Reservation ID: RES-0000146267

Core: Optical Molecular Imaging and Analysis

Private?

Project Name: Test Project for Jared Atherton (jra16) as PI and F

Reserved By Name: Angelica Morgan (alm90)

Reserved For Name: Angelica Morgan (alm90)

Reserved For Phone: +1 919 613 0534

Reservation Start Time: 06:00 PM

Reservation End Time: 06:30 PM

Activity: Instrument Only

Location:

Repeat required?

Repeat End Date:

Reserved on: 07/11/2018 09:18:14 AM

Experiment Information:

Services Performed:

Modify Reservation - Google Chrome

vld-lvdev01:8080/CR/rc?command=page&ssid=Reservation

Modify Reservation Save Check Availability Close & Refresh

Reservation

Reservation ID	RES-0000146267	Status	Approved
Reservation Start Date *	07/11/2018	Reservation Start Time	6 PM 00
Reservation End Date *	07/11/2018	Reservation End Time	6 PM 30

REPEAT RESERVATION PATTERN

Modify Repeat Pattern?

Repeat Type:

Repeat Every: Sunday Monday Tuesday Wednesday Thursday Friday Saturday

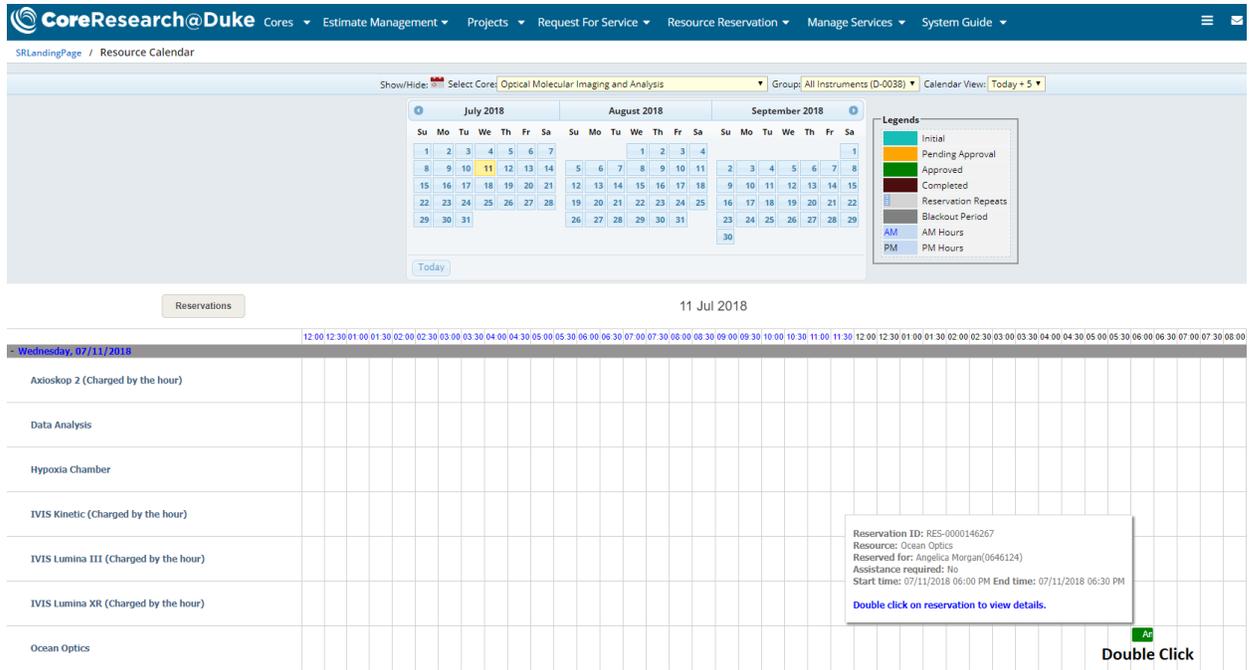
Repeat required?

Repeat End Date:

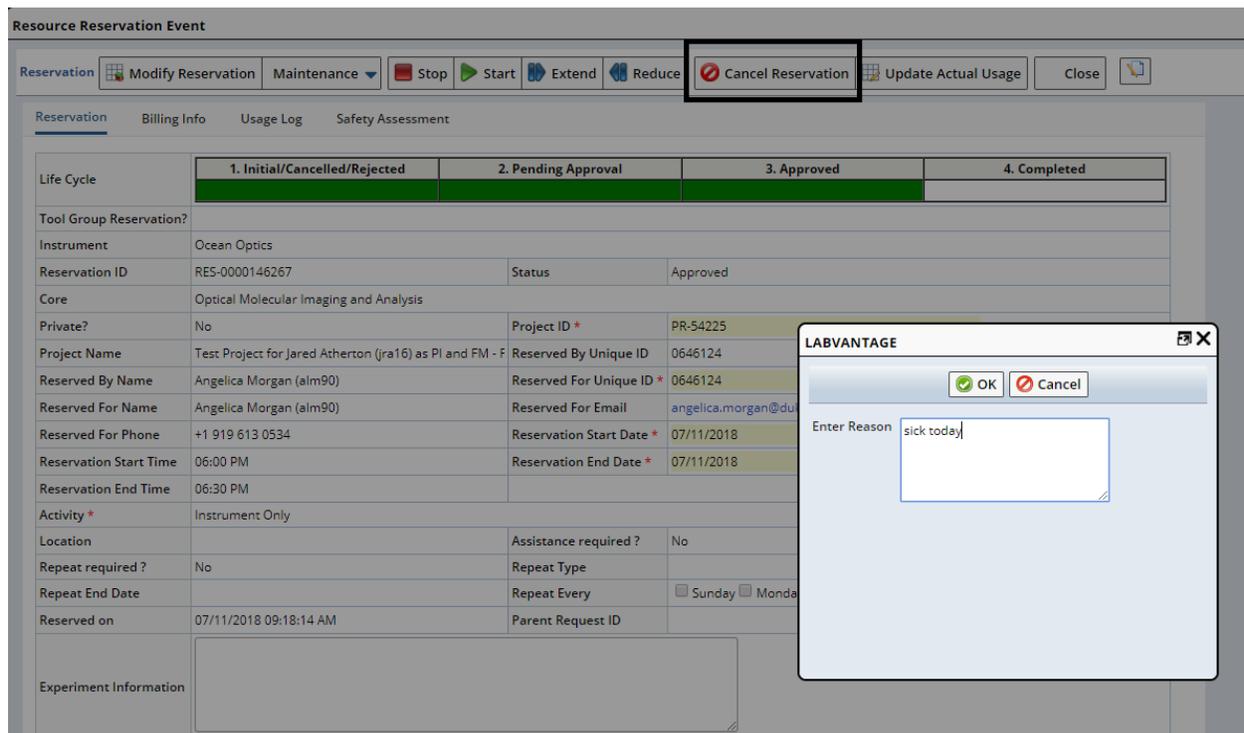
Reservation Cancellation

How to cancel a reservation (prior to reservation start time)

1. Double click on the reservation from the Reservation Calendar.



2. Select the Cancel Reservation button, enter a Reason and select OK.



Reservation Fulfillment

How to start and stop a reservation

1. Double click on the reservation on the Reservation Calendar

2. Press the Start button. Note: Some instruments allow for selection of the Start button prior to the scheduled Start time and others do not, so you may receive an error message if you select the Start button prior to the scheduled start time.

Resource Reservation Event

Reservation Modify Reservation Maintenance Stop **Start** Extend Reduce Cancel Reservation Update Actual Usage Close

Reservation Billing Info Usage Log Safety Assessment Start Session

Life Cycle	1. Initial/Cancelled/Rejected	2. Pending Approval	3. Approved	4. Completed
Tool Group Reservation?				
Instrument	Ocean Optics			
Reservation ID	RES-0000146267	Status	Approved	
Core	Optical Molecular Imaging and Analysis			
Private?	No	Project ID *	PR-54225	
Project Name	Test Project for Jared Atherton (jra16) as PI and FM - F	Reserved By Unique ID	[Redacted]	
Reserved By Name	[Redacted]	Reserved For Unique ID *	[Redacted]	
Reserved For Name	[Redacted]	Reserved For Email	[Redacted]	
Reserved For Phone	[Redacted]	Reservation Start Date *	07/11/2018	
Reservation Start Time	06:00 PM	Reservation End Date *	07/11/2018	
Reservation End Time	06:30 PM			
Activity *	Instrument Only			
Location		Assistance required ?	No	
Repeat required ?	No	Repeat Type		
Repeat End Date		Repeat Every	<input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday	
Reserved on	07/11/2018 09:18:14 AM	Parent Request ID		
Experiment Information	[Redacted]			

Services Performed

3. If during your session you decide that you do not need the instrument for as long as you reserved it, select the Reduce button to decrease the current end date and/or time. This will make the instrument available to others to reserve during the time in which you no longer plan to use it.

The screenshot shows the 'Resource Reservation Event' interface. The 'Reduce' button in the top toolbar is highlighted with a red box. A secondary window titled 'Reduce Session' is open, displaying reservation details for RES-0000146267. The 'Reservation End Time' is set to 6 PM and 30 minutes, which is also highlighted with a red box.

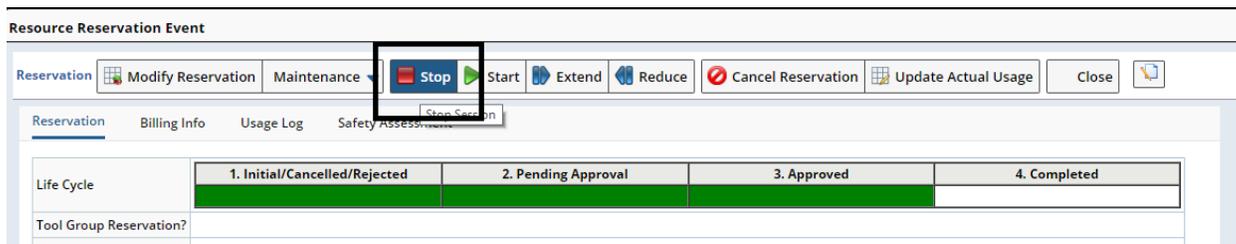
Life Cycle	1. Initial/Cancelled/Rejected	2. Pending Approval
Tool Group Reservation?		
Instrument	Ocean Optics	
Reservation ID	RES-0000146267	Status
Core	Optical Molecular Imaging and Analysis	
Private?	No	Project ID *
Project Name	[Redacted]	Reserved By User
Reserved By Name	[Redacted]	Reserved For Instrument
Reserved For Name	[Redacted]	Reserved For Location
Reserved For Phone	[Redacted]	Reservation Start Time
Reservation Start Time	06:00 PM	Reservation End Time
Reservation End Time	06:30 PM	Activity *
Activity *	Instrument Only	
Location		Assistance required?
		No

4. If during your session you decide that you need the instrument for longer than you reserved it, select the Extend button to decrease the current end date and/or time. If the updated, end/date time does not overlap with another scheduled reservation, the reservation calendar will be blocked off to prevent others from scheduling a reservation during the extended time.

The screenshot shows the 'Resource Reservation Event' interface. The 'Extend' button in the top toolbar is highlighted with a red box. A secondary window titled 'Extend Session' is open, displaying reservation details for RES-0000146267. The 'Reservation End Time' is set to 6 PM and 30 minutes, which is also highlighted with a red box.

Life Cycle	1. Initial/Cancelled/Rejected	2. Pending Approval
Tool Group Reservation?		
Instrument	Ocean Optics	
Reservation ID	RES-0000146267	Status
Core	Optical Molecular Imaging and Analysis	
Private?	No	Project ID *
Project Name	[Redacted]	Reserved By User
Reserved By Name	[Redacted]	Reserved For Instrument
Reserved For Name	[Redacted]	Reserved For Location
Reserved For Phone	[Redacted]	Reservation Start Time
Reservation Start Time	06:00 PM	Reservation End Time
Reservation End Time	06:30 PM	Activity *
Activity *	Instrument Only	
Location		Assistance required?
Repeat required?	No	Repeat Type
Repeat End Date		Repeat Frequency

- When you are finished using the instrument, select the Stop button.



- The screen will refresh with an Operation Successful message and the available button operations will change. If different than the reservation's start and end time, you may update the Actual Usage value at this time by selecting the Update Actual Usage button. Note: The Update Actual Usage function is only allowed up until the Core Manger marks the Service Tasks for the reservation to 'Ready to Invoice'.

