CoreResearch@Duke

Access / System Requirements / Login

Access Guidelines
- All users must first have a Duke NetID.
- **Principal Investigators and Financial (Grant) Managers** are automatically given access based upon active Fund Codes in SAP.
- **Core Directors, Core Managers and Core Staff** are given access by System Administrators in the Office of Research Informatics. To request access, contact DHTS at 684-2243 and have them send a ticket to the Office of Research Informatics.
- **Facility Users (members of a PI's lab)** are given access by Financial Managers or PI's linking them to the PI and to Projects.

System Requirements
- **Supported Browsers**
  - Internet Explorer
  - Chrome
  - Safari
- **Firefox is *NOT* supported.**
- **Pop Up Blockers *MUST* be disabled for this site.**

Login Information
- **URL: https://coreresearch.duke.edu/CR/**
- When entering manually into a browser window's address bar, you can just enter **coreresearch.duke.edu** and press enter/return.
- **Prerequisites**
  - User must have a valid NetID
  - User must have been set up with an account in CoreResearch@Duke per Access guidelines above.
- Login with your NetID credentials

Toolbar

Sitemap Selection – Switch between **LIMS (Transactional) Sitemap** and **LabAdmin (Configurational) Sitemap**

Log Off – Log off the CoreResearch@Duke application. Recommended every time you are done using the application.

User Preferences – Allows you to view your user information as well as set Email Notification Exclusions.

Clear My Previous Sessions – Logs off previous sessions. In case you are logged into the application from multiple browser windows/tabs or multiple computers, this clears all previous sessions.

System Guide – FAQ's, Cheat Sheets, Workflows Diagrams, Process Diagrams, etc.
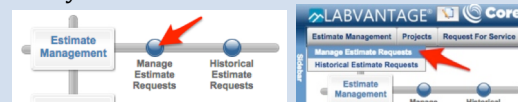
Definitions

Landing Page – The first page you see in the system upon login, showing Tram Lines and Tram Stops.
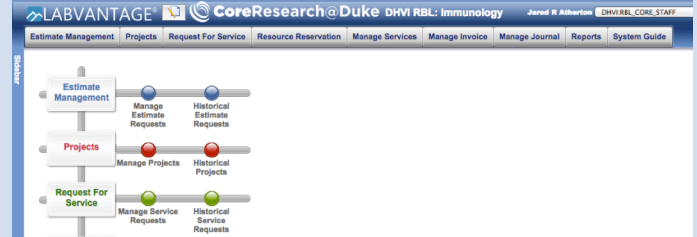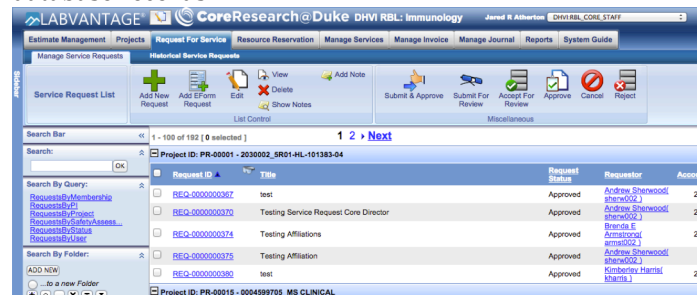
Tram Line - A visual representation of a functional category on the landing page or a tab header. Contains one or more Tram Stops or sub-tabs.

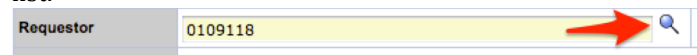**Tram Stop -** A visual representation of a function within the system that falls under a Tram Line or tab header.

List Page - A page displaying a list of one or multiple database records.

Maintenance Page – A page displaying a single record, either in edit or read only mode.

Lookup Tool – A tool to select a field value from a filtered list.

CoreResearch@Duke

Definitions (continued)

Fund Source – A Fund Source in CoreResearch@Duke can be a Fund Code, Cost Center, Purchase Order (PO), or Non-PO. This is considered the billable account number.

Account Number – The billable account number of a fund source. This is most often the Fund Code or Cost Center number as it is referenced in SAP.

Project – A 'Project' in CoreResearch@Duke is a container for a Fund Source (Fund Code, Cost Center, Purchase Order, Non-PO), the Principal Investigator (PI) listed for that Fund Source, the Financial Manager/Grant Manager for that fund source, and Members (Facility Users).
- A PI, PI Delegate, or Financial Manager will need to add Facility Users as Members of the Project before those Facility Users can make requests against that Project.
- Projects are automatically created for most Fund Codes and data is updated from SAP.
- A Fund Code that has two Principal Investigators will generate two separate Projects in CoreResearch@Duke, one for each PI.

Membership – A membership in CoreResearch@Duke refers to a Principal Investigator's membership to an internal Duke organization.
- Memberships can be used by Cores to provide discounted rates for services performed.
- Memberships can only be selected when making a request if the PI is established in Duke's FReD/DFac tool and the Core acknowledges that membership.
- Memberships are only established by official designation within the FReD/DFac tools at Duke.
- Some examples of possible PI Memberships include:
  - Duke Cancer Institute
  - Duke Human Vaccine Institute
  - Center for Human Genome Variation (CHGV)
- The default membership is 'Duke'
- Discounted rates are only applied if the Core has set up their rates accordingly.

Affiliation - An Affiliation in CoreResearch@Duke refers to a Project's (Fund Source's) affiliation with a subsidizing entity, whether internal to Duke or external to Duke.
- Affiliations can be used by Cores to provide discounted rates for services performed.
- Affiliations must be applied to Projects by Core Managers.
- Affiliations can only be selected when making a request if the selected Core has designated the affiliation for the selected Project.
- Discounted rates are only applied if the Core has set up their rates accordingly.

Definitions (continued)

Requestor – The requestor of a service or reservation.
- When a Facility User, PI, PI Delegate, or External Facility User creates a request, that person is the requestor and they are automatically set as the requestor in the system.
- When a Core Director, Core Manager, Core Staff creates a request on behalf of someone else, they are able to set the requestor

Service Request – A request to a shared resource core for services to be performed by that core.

Reservation Request – A request to a shared resource core to schedule/reserve a resource of that core.

Service Task – Individual services to be performed. Service Tasks can be Billable or Non-Billable. Billable Service Tasks have fees/rates associated with them and show on invoices as individual line items. A Service Request or Reservation Request may contain one or multiple Service Tasks.

CoreResearch@Duke

User Job Types

Core Director – Same as Core Manager, but rights to multiple Cores.

Core Manager – Manager of Core
Responsible for:
- Core configuration
- Setting Service Task Rates
- Applying Service Tasks to Requests
- Communication with PIs, Financial Managers, and Requestors
- Management of Estimates
- Management of Requests (Service, Reservation)
- Assignment of tasks to Core Staff
- Invoicing and Billing
- Running Reports

Core Staff – Non-management Core Staff
Responsible for:
- Fulfilling Service Tasks
- Communication with PIs, Financial Managers, and Requestors when needed

Principal Investigator (PI) – Responsible Person for any given Project / Fund Source.
Responsible for:
- Management of Facility Users via PI/Facility User Linking Process
- Assigning Facility User membership to Projects/Fund Sources
- Communication with Facility Users, Financial Manager, Core

PI Delegate – Same role as a PI, but is typically a Facility User or Financial Manager acting on a PI's behalf.

Financial (Grant) Manager –
Responsible for:
- Creating Facility User accounts via PI/Facility User Linking Process
- Assigning Facility User membership to Projects/Fund Sources.
- Project Management (Placing Projects on Hold)
- Approving Invoices
- Communication with PI, Core

Facility User – Typically the requestor that is requesting services to be performed or reservations.
Responsible for:
- Submitting Requests to the Core
- Communication with PI, Core

External Facility User – A user that is external to Duke and is operating on a PO or Non-PO.

Help / Support

System Guide – Before contacting the DHTS Service Desk, please search the documentation available in the in-application System Guide. The System Guide can be accessed by the System Guide Tram Line, or by clicking the button in the top-right toolbar.

Call the DHTS Service Desk – (919)684-2243