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

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.

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 (continued)**

<table>
<thead>
<tr>
<th><strong>Fund Source</strong> – 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.</th>
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<tbody>
<tr>
<td><strong>Account Number</strong> – 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.</td>
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**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)**

<table>
<thead>
<tr>
<th><strong>Requestor</strong> – The requestor of a service or reservation.</th>
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<tbody>
<tr>
<td>• 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.</td>
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<tr>
<td>• When a Core Director, Core Manager, Core Staff creates a request on behalf of someone else, they are able to set the requestor.</td>
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<tr>
<th><strong>Service Request</strong> – A request to a shared resource core for services to be performed by that core.</th>
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<tr>
<th><strong>Reservation Request</strong> – A request to a shared resource core to schedule/reserve a resource of that core.</th>
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<tr>
<th><strong>Service Task</strong> – 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.</th>
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<tbody>
<tr>
<td>User Job Types</td>
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<td><strong>Core Director</strong> – Same as Core Manager, but rights to multiple Cores.</td>
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| **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 | **Call the DHTS Service Desk – (919)684-2243** |
| **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. | |