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Target Audience

This document was written to support the activities for the following CoreResearch@Duke Job Type: Facility User

Facility User Job Type Access

Facility User accounts are created automatically when a person from the Duke system is linked to a PI. After a facility user account is created through the PI linking process, the facility user must then be added to the fund code as a member of the project.

System Requirements

Supported Browsers:

- Internet Explorer
- Chrome
- Safari
- Firefox is NOT supported.

Pop Up Blockers MUST be disabled for this site.

Login Process

To access the CoreResearch@Duke application, users must go to https://coreresearch.duke.edu/CR. Users will be presented with a login screen. The login process validates the Duke NetID and password provided and logs the user into the CoreResearch@Duke application if the user has an active account.

For TRAINING and TESTING purposes, please use the URL https://qa.coreresearch.duke.edu/CR
The login process determines what job types the logged in user can have in the system. Job types are assigned to the user when an account is established. A user’s Job Type determines the pages and operations available to the user.

At any given time, the user can be logged into the system with only one job type, though the user may have many job types assigned to them. Switching to another job type can be done in the job type dropdown at the top of the page. If a user only has one job type assigned, they will not see this as a dropdown and instead it will show the single job type as static text.

Navigation

General
Do not use the ‘Back’ or ‘Forward’ buttons in your browser. Only navigate within the confines of the application. Selecting ‘Back’ in your browser will force you to refresh the page and may clear any pending operations.

Sitemap
On login, a Sitemap is presented specific to the currently selected job type of the user.

By default, the Facility User has access to the External Sitemap. The sitemap and logged in job type, defines which functions and operations are available to you. Tram Lines and Tram Stops organize the available functions.
Tram Line
A Tram Line is a grouping of related Tram Stops, or functions. Tram Lines are represented on the initial Site Map as well as tabs.

Tram Stop
A Tram Stop is an individual function and will direct you to a respective page. Tram Stops are represented on the initial Site Map as well as sub-tabs. The primary Tram Stops that DMPI Human Physiology Testing Core will use are ‘Manage Estimates,’ ‘Manage Service Requests,’ and ‘Manage Invoices.’
Page Tabs

Within a Tram Stop, there are a number of navigation options to select desired content.
Toolbar

At the top-right of the application, there is a Toolbar with several operations:

<table>
<thead>
<tr>
<th>Toolbar</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Sitemap Selection" /></td>
<td>Sitemap Selection – Switch between LIMS (Transactional) Sitemap and LabAdmin (Configurational) Sitemap</td>
</tr>
<tr>
<td><img src="image" alt="Log Off" /></td>
<td>Log Off – Log off the CoreResearch@Duke application. Recommended every time you are done using the application.</td>
</tr>
<tr>
<td><img src="image" alt="User Preferences" /></td>
<td>User Preferences – Allows you to view your user information as well as set Email Notification Exclusions.</td>
</tr>
<tr>
<td><img src="image" alt="Show Hidden Records" /></td>
<td>Show Hidden Records – Allows you to view hidden records that have been disabled or inactivated.</td>
</tr>
<tr>
<td><img src="image" alt="Clear My Previous Sessions" /></td>
<td>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.</td>
</tr>
<tr>
<td><img src="image" alt="System Guide" /></td>
<td>System Guide – FAQ’s, Cheat Sheets, Workflows Diagrams, Process Diagrams, etc.</td>
</tr>
</tbody>
</table>

Side Bar Menu

The ‘Side Bar’ menu offers additional control and navigation features.
Service Requests
How to create a service request

1. LOGIN to CoreResearch@Duke.
2. Select the ‘Manage Service Requests’ Tram Stop from the ‘Request For Service’ Tram Line.
3. Click ‘Add New Request’ in the operations bar.
4. Enter all necessary information on each tab. Mandatory fields are highlighted in yellow. To search click on the magnifying glass. Enter your search information (i.e. fund code) and click OK.

5. Click ‘Save’ when you are done filling in the mandatory fields.
6. If you’re unsure of the exact service, click on Service Description, describe what you’re looking for and save.

7. If you know what services you want, click on Add New (in Services Requested), select from the list, and save.
8. Once the request is saved click ‘Submit For Review’.