

SERVICE CORE ASSOCIATE

The **Core Associate** role is to manage core services, including order entry and core device reservations.

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Log in to CORES

insideND (inside.nd.edu)

- On the **Academic** (faculty) or **Administrative Tools** (all others) tab in the **Research** channel, click on the **CORES logo**.

OR




cores.nd.edu

- Click on the **CORES logo**.
- Log in using your **NetID** and **password**.

NOTE: If you have multiple roles in CORES, you will see a *Role Selection* page. Select the role for the task you need to complete.

PLACE AN ORDER

You can enter an order and save it as an open order or submit it. You can also save it as template or recurring order with a repeat cycle.

1. Under *Quick Links*, click **Order Entry**.
2. Search for the customer for whom you want to place an order in one of these three ways:
 - Option 1: Select from your Top 10 Customers list at the bottom of the screen. Click the appropriate **customer's FOP**.
NOTE: Proceed to Step 4.
 - Option 2: Search for a specific PI or FOP. Type in the last name of the **PI or FOP** in the *Search For* field. You can also select a specific **Project ID** to search for by selecting it from the *Project ID* dropdown menu. The *Date Service Provided* defaults to the current date, or you can click on the **icon** to select a different date. Click on the appropriate FOP from the search list.
NOTE: Proceed to Step 4.
 - Option 3: Select an external customer. Click **External Customer** (upper right). Select the appropriate customer information. Click **Select**. Verify that this is the correct customer and the information is correct. Click **Continue**.
3. Select the **Category** and **Description** from the dropdown menus and modify **Quantity** and **Price** as appropriate. The *Subtotal* and *Total* will auto populate.
4. You may use the following options, as available
 - To add line item comments, click  and then **Close**.
 - To add line item resource, click  and then **Close**.
 - To add line item assistant, click  and then **Close**.
5. To add additional line items, click **Add Item**.
6. Type any **order-specific comments** into the *Comments* box. These comments can be viewed by all users with access to this order.
7. Enter the last name of the person placing the order in the **Purchaser's Last Name** box.
8. Type any **Core Manager notes** into the *Core Manager Notes* box. These notes cannot be viewed by the customer.
9. Select one of the following:
 - Submit Order: When all items are added, click **Submit Order**. Click **OK** to submit for billing. Click **Print** to print the order receipt or **Cancel** printing. Enter another order or click **Cancel** to return to the *Service Core Manager Portal*.
NOTE: For external customer, click Submit for Invoice.
 - Split Payment and Submit Order: To split payment between FOPs after all items are added, check **Split Payments**. For further instructions, see these sections in this guide: "Distribute Evenly across Multiple FOPs" and "Distribute Manually across Multiple FOPs".
 - Submit Order And Save As Template: To save the order as a template with preloaded information, check **Submit Order And Save as Template**, and then click **Submit Order** and click **OK** to message. Click **Print** to print the order receipt or **Cancel** printing. Enter another order or click **Cancel** to return to the *Service Core Manager Portal*.
NOTE: The template will display as a check box under Use Order Template, indicating that an order can be placed with preloaded information. Uncheck the box to clear information from the order screen.

- Save as Open Order: When all items are added, click **Save as Open Order**. Click **OK** to save for later submission. Click **Return** to return to the *Service Core Manager Portal*.
- Save as Estimate: When all items are added, click **Save as Estimate**. Click **OK** to save as order estimate for later submission. Review the list of estimate orders or click **Return** to return to the *Service Core Manager Portal*.
- Save As Recurring Order: To set the order as a recurring order, check **Save As Recurring Order**. From the *Repeat* dropdown, select the repeat cycle, *Recurrence Pattern* and *Range*. Click **Save As Recurring Order** and click **OK** to submit the order. Enter another order or click **Cancel** to return to the *Service Core Associate Portal*.

RESERVE CORE DEVICE

You can reserve a device for a specific date and time. Reserving a device creates an unconfirmed order for that device.

1. Under *Quick Links*, click **Reserve Core Device**.
2. If only one core or resource is displayed, skip to Step 3.
If multiple cores or resources are displayed, select a **core** (required) and up to 6 resources (optional). Then click **View Calendar**. For each device chosen, a different colored column will be added to the calendar. Hovering over the colored numbers will show device details.
IMPORTANT! You will repeat steps 3-11 for each device you wish to reserve.
NOTE: *If a resource to which you should have access is not displayed, contact that core.*
3. Use the down arrows to change the month and year. Use the radio buttons at upper left to change time intervals.
4. On the calendar, click the **date and start time** of the reservation.
5. Adjust *Category* and *Description*, as needed. As the *Description* changes, the *Price* will auto populate as appropriate.
6. To add line items, check **Add line items** and select the *Category* and *Description* from the dropdown menus and modify *Quantity* as appropriate. Both the *Price* and *Extended Price* will auto populate. Click **Add Item** to add additional items.
7. There are three options for choosing who to reserve for:
 - To **Reserve for a PI**, check the box and select the **PI's name and the appropriate FOP** from the dropdown menus.
 - To **Reserve for an External Customer**, check the box and select the **customer's name** from the dropdown menu.
 - To **Reserve for a Resource User**, check the box and select the **user's name, the PI's name, appropriate FOP and Project ID** from the dropdown menus.
8. Modify the **Start and End** times.
9. To repeat the reservation, from the *Repeat* dropdown select the **appropriate frequency**.
10. Enter any *Comments* in the box.

11. Click **Submit** to enter the reservation or **Submit and Print** if you wish to print a copy of the reservation.
 - If you select **Submit**, you will return to the calendar.
NOTE: The reservation will not appear as an unconfirmed order until after midnight.
 - If you select **Submit and Print**, click **Print** from the *Reservation Confirmation* page, and **Print** from the Print dialog box. Click **Return** to return to the calendar.
12. You can make another reservation or click **Cancel** to go back to the *Service Core Associate Portal*.

NOTE: If you wish to edit or delete a reservation before it becomes an unconfirmed order, you must do so from the calendar.

OPEN ORDER STATUS

You can edit and save open orders. You can also submit the entire order or a partial order for billing.

1. Under *Quick Links*, click **Open Orders**.
2. If you want to reorder the list, click the appropriate **row heading**.
3. To print an order, click the **Print** icon next to the line item. Click **Print** or click **Close** if no copy is needed.
4. To view or change an order, click on the **Open Order number**. Make changes to the open order as needed.
5. Click **Add Item** to add to the order. Use the dropdowns to set order details.
6. You can save the order as an open order, submit the entire order for billing, or submit a partial order for billing:
 - Click **Save Open Order** and then **OK** to save as an open order. Click **Close** to return to the *Open Order* screen.
 - Click **Submit Order** and then **OK** to submit the order. Click **Print** to print or **Cancel** to return to the *Open Order* screen.
 - **Submit Partial Order:** All items must be saved before selecting this option. To submit a partial order, check the box at far right of the line item(s) you wish to submit, and then click **Submit Partial Order**. Click **OK** to the message. Click **Print** to print or **Cancel** to return to the *Open Order* screen.
7. Click **Return** to return to the *Service Core Associate Portal*.

TIME ENTRY

You can record actual time worked for professional services. You can choose to make the time non-billable or charge to a PI or External Customer.

1. Under *Quick Links*, select **Time Entry**.
2. If only one person is displayed, skip to Step 3.
If multiple people are displayed, select **up to 6**. Click **View Calendar**. For each person chosen, a different colored column will be added to the calendar. Hovering over a color indicator will show user details.
IMPORTANT! You will repeat steps 3-11 for each person.
3. Use the down arrows to change the month and year. Use the radio buttons at upper left to change time intervals.

4. Click **the day and time** for which you want to record time by clicking the appropriate block on the calendar.
NOTE: This is actual time previously worked.
5. There are three billing options:
 - **Internal/Non-billable:** Time is entered but PIs not billed. Data displays in Time Tracking Report.
 - **Charge a PI:** Select the **name and FOP** from the dropdown menus. To add a PI to your current customer list, check **Add PI to List of Current Customers**.
 - **Charge for External Customer:** Select **name** from the dropdown. To add External Customer to your current customer list, check **Add PI to List of Current Customers**.
6. Select **Category** and **Description** from the dropdowns.
7. Select a **Project ID** from the dropdown menu, if applicable.
8. Enter the **Start Time** and **End Time** from the dropdown menu.
9. Enter **Comments**, if any.
10. Click **Submit**. Click **OK** to the message to submit for billing.
11. Click **Cancel** to return to the *Service Core Associate Portal*.


ORDER ESTIMATES

Once you have saved an order as an Estimate, you can edit or delete the Estimate, or save it as an open order or submit it.

Edit an Estimate

1. From the **Entry** dropdown menu, select **Order Estimate**.
2. Search for an order or, if the order is listed on the page, click on the **Estimate #**.
3. Make edits to the estimate as needed.
4. To add line items, check **Add Item** and select the *Category* and *Description* from the dropdown menus and modify *Quantity* as appropriate. The *Price*, *Subtotal* and *Total* will auto populate. To add additional items, click **Add Item**.
5. Click one of the following:
 - **Submit Order** and then **OK** to submit the order. Click **Print** or **Cancel** to return to the *Order Entry* screen.
 - **Save as Open Order** to save as an open order and then click **OK**. Review the open orders or click **Return** to return to *Service Core Associate Portal*.
 - **Save Estimate** and then **OK** to resave the estimate with changes.
 - **Cancel** to go back without accepting the changes.
6. Click **Return** to return to *Service Core Associate Portal*.

Delete an Estimate

1. From the *Entry* dropdown menu, select **Order Estimate**.
2. On the *Estimates* page, click the **Delete** icon  and then **OK** to confirm the deletion.
3. Click **Return** to return to *Service Core Associate Portal*.

Print an Estimate

1. From the *Entry* dropdown menu, select **Order Estimate**.
2. On the *Estimates* page, click the **Print** icon.
3. A separate Print Receipt Screen will open. Click **Print** to print or **Close** to return to the *Order Estimates* page.
4. Click **Return** to return to *Service Core Associate Portal*.

UNCONFIRMED ORDERS

You can confirm (submit) any unconfirmed orders which are automatically generated from reservations and recurring orders. Orders will not appear as unconfirmed until after midnight of the day of the reservation. You can also edit an unconfirmed order and submit it. Once an unconfirmed order is edited, it must be submitted. It cannot be resaved as an unconfirmed order.

Confirm an Unconfirmed Order

1. Under *Quick Links*, click **Unconfirmed Orders**.
2. Select (check) the order(s) you wish to confirm.
NOTE: *By default, all orders are checked. You may need to check **Select/Deselect** to deselect the orders before checking the one you want.*
3. Click **Confirm Orders**.
4. Click **OK** to submit the orders as confirmed orders.
NOTE: *These orders will be included in the next upload file to Finance.*
5. Click **Return** to return to the *Service Core Associate Portal*.

Edit an Unconfirmed Order

1. Under *Quick Links*, click **Unconfirmed Orders**.
2. Click the *Reservation Confirmation Number* of the order you wish to view/edit.
3. Adjust the **Quantity** as appropriate and also add line items and comments as necessary.
4. To save changes and submit the order, click **Submit Order**. Click **Print** or **Cancel** to return to the *Order Entry* screen.
To cancel the changes and return to the Unconfirmed Orders page, click **Cancel**.
5. Click **Return** to return to the *Service Core Associate Portal*.

Delete an Unconfirmed Order

1. Under *Quick Links*, click **Unconfirmed Orders**.
2. Click the **Delete (red x)** button for the order you wish to delete.
3. Click **OK** in the pop-up window to complete the deletion.
NOTE: *Deleted unconfirmed orders will not be included in the upload file to Finance.*
4. Click **Return** to return to the *Service Core Associate Portal*.

REFUND ENTRY

1. From the **Entry** dropdown menu, select **Refund Entry**.
2. Enter the **Order Number** of the order to be refunded.
3. Click the **Search** button.
4. On the *Refund - Item Information* page, in the **Date Refund Provided Field**, select the date that the refund was provided. The date cannot be a date in the future or a date before the order was entered.
5. Select a reason for the refund from the **Refund Reason** dropdown menu.
6. In the **Refund Quantity** field, enter the quantity to be refunded.
7. Ensure that the PI's name appears in the **Refunder's Last Name** field.
8. Click on the **Comment ("C")** icon to write a line item comment. Once the comment has been entered the icon will turn to a bright green color. These comments can be viewed by all users who have access to this order.
NOTE: This is not a required field.
9. Enter **Core Manager Notes**. These notes can only be viewed by the Core manager, Core Manager Assistants, and the Office of Research.
NOTE: This is not a required field.
10. Click **Submit Refund**. Click **OK** in the pop-up window to submit the refund.
11. A separate *Print Receipt* screen will open. Click **Print** to print the receipt or **Cancel** if you do not need to print.
12. You will be returned to the *Refund – Order Number Search* page. Click **Cancel** to return to the *Service Core Associate Portal*.

CORRECT A FOP

You can only correct FOPs for open orders prior to submission.

1. From the **Entry** dropdown menu, select **Open Orders**.
2. Click on the **Open Order number**, this will bring up the **Open Order**.
 1. A box will appear at the top of the screen that says **Open Order** has been loaded.
 3. In the gray box, there is a field labeled FOP: with a dropdown menu next to it.
 2. Click on the **dropdown** menu to see other FOPs assigned to that PI.
 3. Select the correct *FOP* for the **Open Order**.
 4. Add comments into the Comments field.
Note: This is not a required field.
 - Add comments into the *Core Manager Notes* field.
Note: This is not a required field.
5. Click **Submit Order** button to submit the order for billing.
6. A pop up box will appear which "Please select **OK** to submit the order for billing for Cancel to make more changes."
7. Click **OK** to submit for billing.
8. A gray box will appear that says "Thank you. Your order has been submitted."
 - Click **Return** to return to the *Service Core Associate Portal*.

DISTRIBUTE EVENLY ACROSS MULTIPLE FOPs

You can distribute charges evenly across multiple FOP numbers. You can only do this for open orders prior to submission.

1. From the **Entry** dropdown menu, select **Open Orders**.
1. Click on the **Open Order number**, this will bring up the **Open Order**.
2. A box will appear at the top of the screen that says **Open Order** has been loaded.
3. At the bottom left-hand side of the screen click the box labeled Split Payments?
4. Add comments into the Comments field.
Note: *This is not a required field.*
5. Add comments into the Core Manager Notes field.
Note: *This is not a required field.*
2. Click **Submit Order** button to submit the order **for** billing.
6. A pop up box will appear which "Please select **OK** to split the payments for billing for Cancel to make more changes."
7. Click **OK** to submit for billing.
8. A new screen will appear, with a drop down box under **New FOP**.
9. From the dropdown menu select **Distribute amount Evenly across Multiple FOP #s**.
3. A new screen will appear with all *FOPs* associated to that PI, click the boxes next to the **FOPs** you wish to bill for the order, and click **Continue**.
10. A new screen will appear showing how the order will be split. Click **Submit** to submit the **Open Order** for billing.
11. You will be returned to the *Open Orders* screen.
 - Click **Return** to return to the *Service Core Associate Portal*.

DISTRIBUTE MANUALLY ACROSS MULTIPLE FOPs

You can distribute charges manually across multiple FOP numbers. You can only do this for open orders prior to submission.

1. From the **Entry** dropdown menu, select **Open Orders**.
1. Click on the **Open Order number**, this will bring up the **Open Order**.
2. A box will appear at the top of the screen that says **Open Order** has been loaded.
3. At the bottom left-hand side of the screen click the box labeled Split Payments?
4. Add comments into the Comments field.
Note: *This is not a required field.*
5. Add comments into the Core Manager Notes field.
Note: *This is not a required field.*
2. Click **Submit Order** button to submit the order **for** billing.
6. A pop up box will appear which "Please select **OK** to split the payments for billing for Cancel to make more changes."
7. Click **OK** to submit for billing.
8. A new screen will appear, with a drop down box under **New FOP**.
9. From the dropdown menu select **Distribute amount Manually across Multiple FOP #s**.
3. A new screen will appear with all *FOPs* associated to that PI.
4. In the boxes next to the **FOPs** enter the amount of the total order to be billed to **each FOP**, and click **Continue**.

10. A new screen will appear showing how the order will be split. Click **Submit** to submit the **Open Order** for billing.
11. You will be returned to the *Open Orders* screen.
 - Click **Return** to return to the *Service Core Associate Portal*.

ORDER UPLOAD

The **Order Upload** process is used in Core Facilities that currently track their orders using an alternative method or other software, and will need to upload their data into **CORES** at the month end.

Create the Excel File

You will need to create an Excel file that contains all of the fields listed below with the following formatting. The header record will need to be included in the upload file, and the field names need to be **EXACTLY** as listed below.

1. Create an excel file that has each of the following as a column title.
 - a. Primary Comments (Not Required)
 - b. Customer Account Number
 - c. Transaction Date
 - d. Service Description
 - e. Quantity
 - f. Unit
 - g. Price
 - h. Service Category
 - i. Secondary Comments (Not Required)
 - j. Pl's Name
 - k. Purchaser's Last Name (Not Required)
 - l. Short Contributing Center Name (Not Required)
 - m. Resource Name (Not Required)
 - n. Line Item Assistant (Not Required)
 - o. Line Item Comments (Not Required)
2. Determine the data that will be entered into each field and ensure that it is formatted following these rules.
 - a. Primary Comments – If no value is to be supplied, two double quotes are required. Field Type-VARCHAR (70).
 - b. Customer Account Number – This is the FOP or FOPA number to be charged and must be defined in CORES. The correct format is XXXXXYYYYYZZ or XXXXXYYYYYZZaaaa and corresponds to Fund, Org, and Program, or Fund Org, Program and Activity. Field Type-VARCHAR (30).
 - c. Transaction Date – Must be a date from the month previous to the current accounting period. For example, if the current accounting period is October, the transaction date must be in September. The format must be in the format DD-MON-YY (e.g., 30-OCT-12). Field Type-DATE.
 - d. Service Description – Description of the service exactly as it is in CORES. Field Type-VARCHAR (100).

- e. Quantity – Number of service units for the period provided. Field Type-Number (8,2).
 - f. Unit – Unit of measure for the service provided (each, hour, etc.). Field Type-CHAR (20).
 - g. Price – Unit cost for service provided. Field Type-Number (7,2).
 - h. Service Category – Category of the service exactly as it is in CORES. Field Type-VARCHAR (100).
 - i. Secondary Comments – If no value supplied, two double quotes are required. Field Type-VARCHAR (100).
 - j. PI's Name – The format must be PI's Last Name, a comma, First Name, a space, and Middle Initial, and enclosed in double quotes. (The name must be exactly as it is in the **CORES** software, if no middle initial in CORES leave it out of the upload file.) Field Type-VARCHAR (60).
 - k. Purchaser's Last Name – Last name or NetID of the individual requesting the service. Field Type-VARCHAR (40).
 - l. Short Contributing Center Name – If no value is supplied, two double quotes are required. Field Type-VARCHAR (8).
 - m. Resource Name – The name of the Resource (equipment or instrument) as defined in CORES. If no value is supplied, two double quotes are required. Field Type-VARCHAR2 (50).
 - n. Line Item Assistant – The Net ID of the line item assistant. If no value is supplied, two double quotes are required. Field Type-CHAR (10).
 - o. Line Item Comments – If no value is supplied, two double quotes are required. Field Type-VARCHAR2 (512).
3. Save the properly set up Excel file as a template that can be used each month.
 4. Enter the monthly data for core services into the spreadsheet, by the preferred method.

Save Excel File as CVS File

After completing all of the above steps, save the file for upload into CORES.

1. On the *File Tab*, click the **Save As** button.
2. From the **Save as type** dropdown menu, select **CSV (MS-DOS)**.
3. Select **Save** in the dialog box to save the file.
4. Select **File**, then **Close**, then **Save** (*You may want to save this file for your records*).

Upload CSV File to CORES

This final step will load the information into **CORES** for processing by the Office of Research.

1. Log into the **CORES** application.
2. On the *Order File Upload Menu*, select **Order File Upload**.
3. Select **Browse** and locate the file name to be uploaded.
4. Select **Open**, for the file name to be uploaded.
5. Select **Validate**.
6. Select **OK** – Note that the Order Upload Validation process may take several minutes.
7. A web page will display when the validation is complete. The results of the validation will indicate if any orders failed validation. These orders will not upload if the process continues.

8. If there are any errors, they can be fixed by following the process described in *Correcting Errors in Upload File* below. Once the errors have been corrected, proceed to step 9.
9. Select **Upload**.
10. Select **OK**.

Correct Errors in an Upload File

If there are any errors in the upload file identified by the validation process, follow these steps.

1. Open the Excel file for the month that is to be loaded to **CORES**.
2. If necessary, click on **Enable Editing** or **Enable Content**.
3. Correct all errors in the Excel file that were identified by the validation process.
5. On the *File Tab*, click the **Save As** button.
6. From the **Save as type** dropdown menu, select **CSV (MS-DOS)**.
7. Select **Save** in the dialog box to save the file.
8. Select **File**, then **Close**, then **Save** (*You may want to save this file for your records*).
9. Once the CSV has been corrected for all identified errors, follow the steps above to *Upload CSV File to CORES*.

PROJECT MAINTENANCE

You can update project information or add a new project.

1. From the **Maintenance Menu** drop-down, select **Project**.
2. Choose to order the list by **Project ID** or **Project Name**.
3. If your project is not listed, click **Add Project**.
 - Fill in the **Project ID**, **Project Name**, **Project Description**, **Project Start Date**, and **Project End Date** fields.
 - If the project is an active project, check the box next to *Active*.
 - Click **Update Project**.
4. To edit a project, click the **required project** to select it.
 - Make any changes necessary for the project.
 - Click **Update Project**.
5. Click **Cancel** to return to the *Service Core Associate Portal*.

CORE MAINTENANCE

You can update the address, e-mail, phone number and fax number of your core. You can also change Core Functions.

1. From the **Maintenance Menu** dropdown, select **Core**.
2. Change the address, e-mail, phone and/or fax number as needed.
3. To change core functions, click **Functionality Controls**.
4. To view a brief description of a function, hover over the check box.
5. Check or uncheck boxes to change functions.
6. Click the **Update Controls** button.
7. Click **Update Core**. This will update the data and return you to the *Service Core Associate Portal*.

FOP SEARCH

1. From the **Maintenance Menu** dropdown, select **FOP Search**.
2. Enter either the **PI's last name** or the **FOP**.

NOTE: The **Search For** field allows for wildcards.
Examples: XXX%, %XXX, %XXX%

3. Click **Search**. Either the selected FOP or all the PI's FOPs will be listed, depending on what criteria were used.
4. Click **Cancel** to return to the *Service Core Associate Portal*.

ITEM MAINTENANCE

You can delete an item or add an item and associate it with a category and description.

1. From the **Maintenance Menu** dropdown, select **Item**.
2. If prompted, select a **Category** and click **Search**.
NOTE: You can toggle between *Active Items* and *Inactive Items* from the search results.
3. If you want to delete an item, click on the **Delete** button that corresponds to the item. Click **Delete Item**.
4. To edit an item, click the item *Description*. Make the necessary changes and click **Update Item**.
5. To add an item, click **Add Item** to add a new item.
 - Select the **Category** from the dropdown menu, or click **New** to enter a new category.
 - Enter the **Description**, **Unit of Measure**, **UND Price**, and **External Price**.
 - Check **Default Item Entry Item** to display category/description as default line item in every Order Entry.
 - Check **PI Order Entry** to allow the PI to order the item in Order Entry.
 - Click **Add Item**.
6. Click **Return** to return to the *Service Core Associate Portal*.

EMAILING IN CORES

You can send an ad hoc email to chosen recipients (Send an Email) or set an automatic message on all active Core receipts (Create a Receipt Message).

Send an Email

1. From the **Maintenance Menu** dropdown, select **Message** and then **Email**.
2. In the *Subject* field, type in the message subject.
3. Type the message in the *Message Content* field.
4. To select the message recipients, click **Review/Edit List**.
5. Check the name(s) of the intended recipient(s). Click **Save**.
6. Click **Deliver This Message** then **OK** in the pop-up window to send message and return to the *Service Core Associate Portal*.




Create a Receipt Message

1. From the **Maintenance Menu** dropdown, select **Message** then **Receipt Message**.
2. In the *Message Content* field, enter the message to appear on all Core receipts.

3. From the *Status* dropdown, choose **Active** or **Inactive** (prevents message from being sent).
4. Add **Start Date** and **End Date** to select the timeframe in which the message will be sent.
5. Click **Add**. This will return you to the *Service Core Associate Portal*.

CREATE A RECURRING ORDER TEMPLATE

You can set an order to automatically reoccur at set interval times.

1. From the **Maintenance Menu** dropdown, select **Reoccurring Order Template**.
2. Enter the **PI's last name** or the **FOP** in the *Search for* field.
3. Click **Search**.
4. Click on the appropriate **FOP number**.
5. Select the *Category* and *Description* from the dropdown menus and modify *Quantity* and *Price* as appropriate. The *Subtotal* and *Total* will auto populate.
6. To add a line item, click **Add Item**. Select the **Category** and **Description** and modify **Quantity** and **Price** as appropriate. The *Subtotal* and *Total* will auto populate.
7. You may use the following options, as available
 - To add line item comments, click  and then **Close**.
 - To add line item resource, click  and then **Close**.
 - To add line item assistant, click  and then **Close**.
7. Type any **order-specific comments** into the *Comments* box. These comments can be viewed by all users with access to this order.
8. Type any **Core Manager notes** into the *Core Manager Notes* box. These notes cannot be viewed by the customer.
9. From the *Repeat* dropdown, select the repeat cycle, *Recurrence Pattern* and *Range*. Click **Save Template** and click **OK** to submit the order and begin. You will return to the *Recurring Order* screen.
10. Click **Cancel** return to the *Service Core Associate Portal*.

ASSOCIATE RESOURCE USER TO PI(S)

You can associate Resource Users to Principal Investigators (PIs) to allow the Resource User designate rights to perform on the PIs' behalf. You can also edit an existing Resource User's association to a PI.

Enter New Resource User and Associate to PI

1. From the **Maintenance Menu** dropdown, select **Resource User**.
2. Enter the **NetID** of the Resource user you wish to add.
3. Click **Search**.
4. Enter the **new user's information** (for e-mail enter <NetID>@nd.edu and set *Reservation E-mails* to **E-mail with vCal**).
5. Click **Add User**.
6. Check the **PI(s)** to which you want the Resource user associated and click **Update**.
7. You will return to the *Service Core Associate Portal* and under **News** it will list the added user.

Edit Resource User's Association to PI

1. From the **Maintenance Menu** dropdown, select **Resource User**.

2. Enter the **NetID** of the Resource user you wish to add.
3. Click **Search**.
4. Click **Associate to PI**.
5. Check the **PI(s)** to which you want the Resource user associated and click **Update**.
6. Click Cancel to return to the *Service Core Associate Portal*.


RESOURCE USER APPROVAL

You can select (approve) the Resources available to a user.

1. From the **Maintenance Menu** dropdown, select **Resource User Approval**.
2. Click on the tab **Available Resource Users**.
3. Type the **Resource Users** last name into the **Last Name** box and press enter.
4. Select one or more users by checking the box in front of the name.
5. Click **Continue**.
6. The next screen will show all the Resources available to this user. **Check/Uncheck** the devices that *should/should not be* used by this user.
7. To save the changes, click the **Save Approvals** button, and then **OK** to save the changes. To not save changes and return to the *Service Core Associate Portal*, click **Cancel** and then **OK**.

RESOURCE MAINTENANCE

You can set up a resource that users can order. You can set such parameters as billing options, reservation times, cancellation policy, email notifications, etc. You can also edit existing resources or delete them.

1. From the **Maintenance Menu** dropdown, select **Resource**.
2. To delete a Resource, click on the **Delete** button that corresponds to the Resource. Click **Delete** and then **OK**.
3. To Edit a Resource, click the **Resource you wish to edit**.
 - Make changes to the resource's setup as appropriate.
 - Click **Update**.
4. To add a Resource, click **Add Resource**.
 - Enter the **Resource Name** and **Description**.
 - Select the appropriate Yes or No radio buttons or check boxes as appropriate.
NOTE: Click  for more detail.
 - If the resource is billable, select the **Billing Type** from the dropdown menu.
NOTE: If the resource is marked as not billable, this dropdown menu will not appear.
 - Modify **Quantity** as appropriate.
 - Select the necessary **Email Policy**, **Cancellation Policy** and **Edit Policy** from the options shown.
 - Select the **Resource reservation time interval**, **Minimum reservation time period**, and **Maximum reservation time period** from the dropdown menus.
 - Enter the **Instructions to Users**, **Location** and **Picture** in the fields provided.
 - Click **Update**.
5. Click **Return** to the *Service Core Associate Portal*.

SEARCHING FOR AN EXTERNAL CUSTOMER AND PLACING AN ORDER

You can determine if an external customer that utilizes your core is in the CORES software and place an order for them the same way that you place an order for internal customers.

1. From the **Entry** dropdown menu, select **Order Entry**.
2. Enter the **PI last name** and click **Search**.
3. You will see a 10-digit external account number which begins with a 9 for an external customer. You may also see a PO Number if one has been added to the system for them.
4. NOTE: You can also search for an external customer by the **Company Name**.
 - Check the box next to **Include Company**, and then search for the company name.
 - Click on the appropriate funding for the order.
5. The **Order Entry** screen will open and you can enter the order as usual.
6. Click **Submit** to submit the order, **Save as an Open Order**, or **Save as an Estimate**.
7. If you are placing an order on a **PO Number** which has been set up with an **Encumbrance** (beginning balance) notice that the balance remaining on the PO will be displayed in the upper right-hand of the screen.

ADDING AN EXTERNAL CUSTOMER TO CORES

You can add an external customer to the CORES software, if the customer is currently not set up in the system. Please ensure the PI is not already in the system by searching by PI last name.

1. From the **Maintenance Menu** dropdown, select **External**.
2. Enter the name, email address, and phone number for the new **External PI**.
3. Select the **Company Name** from the dropdown menu, or if the Company is not already in the system, click **Add New Company**.
4. Enter the contact name, address and phone number for the accounts payable department for the company.
5. Click **Save**.
6. NOTE: If a **PO Number** is to be associated with the external customer, it is important that you **Contact OVPR** as soon as possible. Only the OVPR role can add a PO Number to the system.

PLACE AN ORDER FOR A PI WITH BOTH INTERNAL AND EXTERNAL FUNDING

Some PI's have both Internal Funding and External Funding. This is only an issue for PI's which are faculty members at both Notre Dame and IUSM-South Bend.

1. From the **Entry** dropdown menu, select **Order Entry**.
2. Enter the **PI's Last Name** and click **Search**.
3. IF the PI is in the system with both internal and external funding, they will have both internal and external account numbers.
 - The internal account is the FOP or FOPA.
 - The external account is a 10 digit number that begins with a 9.
4. Choose the appropriate funding for the order you are placing and place the order as usual.