

PRINCIPAL INVESTIGATOR

The **Principal Investigator** role is for the customers of the system who are primarily responsible for FOPs used in orders, distributing charges between FOPS and reviewing the monthly invoices.

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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 request services by entering an open order online. The Core Manager can then add to or edit the order as needed and submit the order when the work is completed.

1. From the **Entry** dropdown menu, click **Order Entry**.
2. If only one core or resource is displayed, skip to Step 3.
If multiple cores or resources are displayed, select a **core**.
3. Select the **FOP number** to charge the order to.
4. Select the **Category** and **Description** from the dropdown menus and modify *Quantity* as appropriate. The *Price*, *Subtotal* and *Total* will auto populate.
5. 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**.
6. To add additional line items, click **Add item**.
7. Type any **order-specific comments** into the *Comments* box. These comments can be viewed by all users with access to this order.
8. In the *Purchaser's Last Name* box, enter the ***last name of the person placing the order***.
9. Click **Save Open Order**. In the pop-up window, select **OK** to save this as an open order for later review and submission by Core Manager.
10. A separate *Print Open Order Ticket* window will open. You can click **Print** to print a copy of the receipt or click **Close**, if no copy is needed.
NOTE: *If you do not see this function, enable pop-ups in your internet browser.*
11. Click **Cancel** to return to the *Principal Investigator 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**.
NOTE: *If a resource to which you should have access is not displayed, contact that core.*
3. On the calendar, click the **date and start time** of the reservation.
4. 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.
5. Modify **FOP** and **Project ID** as appropriate.
6. Modify the **Start and End** times.
7. Enter any *Comments* in the box.
8. 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.
 - 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.
9. You can make another reservation or click **Cancel** to go back to the *Principal Investigator Portal*.

SEARCH FOR SERVICES IN A CORE

You can search for a core (or all cores) and view available services.

1. Under *Quick Links*, click **Search for Services**.
2. You can confine your search to a specific core or search all cores.
 - To search all cores, select **All Cores** from the dropdown, enter keyword(s) to narrow the search or % to show all. Click **Search**.
 - To search a specific core, select the **core** from the dropdown. Click **Show All** to find all services and products for that core. Enter keyword(s) to narrow the search within the Core selected.
NOTE: *The Search For field allows for wildcards.*
Examples: XXX%, %XXX, %XXX%
3. Click **Cancel** to return to the *Principal Investigator Portal*.

CORRECT A FOP

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

1. From the **Entry** dropdown menu, click **FOP Correction/Distribution**.
2. Choose to **Display All Transactions for Current Month**.
NOTE: *Multiple FOPs will list separately.*
3. Click the *Question Mark* icon  to view comments associated with an order.
4. Click **Show Totals** to display the total charges by FOP in a summary format.
5. In the appropriate FOP list, locate the order you wish to correct and use the *New FOP* dropdown to select the appropriate **FOP**.
6. Click **Update Display** to display your change in the *New FOP* list.
7. When you are done making corrections, click **Save** to save your work.
8. Click **Print** (then **Print** again in the Print dialog box) to print the transaction list.
9. Click **Close** to return to the *Principal Investigator 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, click **FOP Correction/Distribution**.
2. Choose to **Display All Transactions for Current Month**.
NOTE: *Multiple FOPs will list separately.*
3. Click the *Question Mark* icon  to view comments associated with an order.
4. Click **Show Totals** to display the total charges by FOP in a summary format.
5. In the appropriate FOP list, locate the order you wish to correct and use the *New FOP* dropdown to select **Distribute Evenly Across Multiple FOP #s**.
6. Put a **check mark** in the box in front of all FOPs to be charged.
7. Click **Continue**.
8. Click **Save** to save your work.
9. Click **Print** (then **Print** again in the Print dialog box) to print the transaction list.
10. Click **Close** to return to the *Principal Investigator 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, click **FOP Correction/Distribution**.
2. Choose to **Display All Transactions for Current Month**.
NOTE: Multiple FOPs will list separately.
3. Click the *Question Mark* icon  to view comments associated with an order.
4. Click **Show Totals** to display the total charges by FOP in a summary format.
5. In the appropriate FOP list, locate the order you wish to correct and use the *New FOP* dropdown to select **Distribute Manually Across Multiple FOP #s**.
6. Enter the **appropriate amounts for each FOP**. These must equal the total amount of the order.
7. Click **Continue**.
8. Click **Save** to save your work.
9. Click **Print** (then **Print** again in the Print dialog box) to print the transaction list.
10. Click **Close** to return to the *Principal Investigator Portal*.

APPROVE/DISPUTE INVOICES

You can review, approve or dispute invoices for the current month.

NOTE: In all situations, the invoice is uploaded to Finance and any needed adjustments are entered by the Core Manager and effective the following month.

1. From the **Invoice Menu**, select **Approve/Dispute Invoices**.
2. Click on the **Invoice Number** to bring up a screen with that invoice information shown.
3. At the far right of each invoice line are two buttons.
To approve all invoices, click **Submit** at the bottom of the page. To dispute an invoice, click its **red** button. From the pop-up menu, select the reason for the dispute. In the *Dispute Comment* box, enter any additional comments. Click **Submit**. Click **OK** to the message.
4. Click **Cancel** to return to *Principal Investigator Portal*.

USER SETUP/MAINTENANCE

You can create a new user and add/change the user's associated FOP(s).

Create a User

1. From the **Maintenance Menu**, select **Resource User Maintenance**.
2. Enter the **user's NetID** in *Search for NetID* field.
NOTE: *Users already associated with the PI are listed at the bottom of the page.*
3. Click **Search**.
4. Click **OK** to confirm that you would like to add the user.
5. Enter the **new user's information** (for e-mail enter <NetID>@nd.edu and set *Reservation E-mails* to **E-mail with vCal**).
6. Click **Associate User**.
7. Click the **User's Name**.
8. Check **the FOP(s)** you want to associate with the user.
9. Click **Update**. The user now has access to the selected FOP(s).
10. Click **Cancel** to return to the *Principal Investigator Portal*.

Add/Change a User's Associated FOP(s)

1. From the **Maintenance Menu**, select **Resource User Maintenance**.
2. Click the **User's Name**.
3. Check **the FOP(s)** you want to associate with the user.
4. Click **Update**. The user now has access to the selected FOP(s).
5. Click **Cancel** to return to the *Principal Investigator Portal*.