

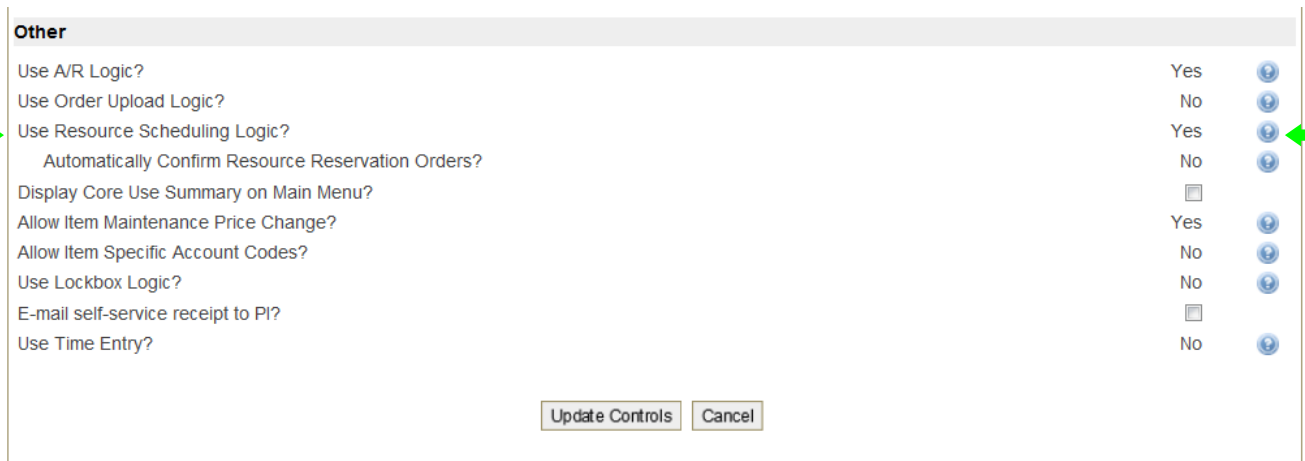
## Using the CORES Online Reservation System









Core facilities that manage shared equipment may opt to use the CORES Resource Reservation module. This functionality allows for all shared equipment to be reserved via a central CORES calendar and automatically creates an order based on the information entered by the PI/Resource User. Once the Resource Reservation module is completely set up and functional, it reduces the reservation process to three easily monitored stages:

1. The PI/Resource User logs in to CORES and reserves the equipment for their desired time. They specify the time frame and center number that should be charged.
2. After the reservation time has passed, CORES changes the reservation to an "Unconfirmed Order." The Core Manager/Associate must confirm the order to ensure that the core receives payment.
3. The order is uploaded at the end of the billing cycle by the Office of Research. Payment is automatically transferred to the core and the PI receives the invoice via email.

### First, ensure that your core is currently set up with Resource Scheduling Logic:

1. Go to Maintenance Menu → Core
2. Next to "Use Resource Scheduling Logic?", ensure that it is marked "Yes." (see below). If it says, "No", please contact the Office of Research to request that the functionality be turned on.



Other		
Use A/R Logic?	Yes	
Use Order Upload Logic?	No	
Use Resource Scheduling Logic?	Yes	
Automatically Confirm Resource Reservation Orders?	No	
Display Core Use Summary on Main Menu?	<input type="checkbox"/>	
Allow Item Maintenance Price Change?	Yes	
Allow Item Specific Account Codes?	No	
Use Lockbox Logic?	No	
E-mail self-service receipt to PI?	<input type="checkbox"/>	
Use Time Entry?	No	

### To create a calendar:

1. Go to Maintenance Menu → Resource
2. Click "Add Resource."
3. Specify the billing parameters for this resource (see next page)

Enter the Resource Name and Description.

**Resource Name:** Super fancy microscope #1

**Description:**

**Is this resource an Assistant?**  Yes  No

**Is this resource currently available for Scheduling?**  Yes  No

**Is this resource billable?**  Yes  No

**Billing Type:** -- Select Billing Type --

**User must be approved to reserve resource?**  Yes  No

**Allow Recurring Reservations?**  Yes  No

**Allow additional Category/Description(s)?**  Yes  No

**Allow Assistant(s) to be reserved for this resource?**  Yes  No

**Show Resource Availability?**

Yes means that this resource will be visible for users to reserve.

Specify how CORES should determine the amount of time for which the user should be

This will allow a user to schedule a reservation to recur on a schedule. For example: every Monday at 3pm- 5pm

Yes means that this resource must always be associated with another resource. No means that this is a stand-alone device.

If there will be a charge incurred for using this equipment, select "Yes." If the user will not be charged, select "No."

If you select "Yes", this calendar will not be visible to a user until you give them access.

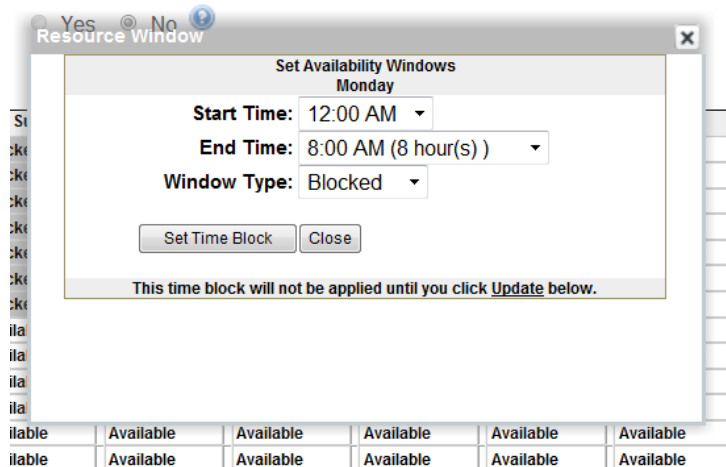
- Specify the lab hours that the resource will be available for use. If your equipment will be available 24 hours a day, you may skip this step.
  - Click "Show Resource Availability" to display the weekly calendar.

Show Resource Availability?

New windows created will not be applied until the resource is saved.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
12:00 AM	Blocked	Available	Available	Available	Available	Available	Available
1:00 AM	Blocked	Available	Available	Available	Available	Available	Available
2:00 AM	Blocked	Available	Available	Available	Available	Available	Available
3:00 AM	Blocked	Available	Available	Available	Available	Available	Available
4:00 AM	Blocked	Available	Available	Available	Available	Available	Available
5:00 AM	Blocked	Available	Available	Available	Available	Available	Available
6:00 AM	Blocked	Available	Available	Available	Available	Available	Available
7:00 AM	Available	Available	Available	Available	Available	Available	Available
8:00 AM	Available	Available	Available	Available	Available	Available	Available
9:00 AM	Available	Available	Available	Available	Available	Available	Available
10:00 AM	Available	Available	Available	Available	Available	Available	Available
11:00 AM	Available	Available	Available	Available	Available	Available	Available
12:00 PM	Available	Available	Available	Available	Available	Available	Available
1:00 PM	Available	Available	Available	Available	Available	Available	Available
2:00 PM	Available	Available	Available	Available	Available	Available	Available
3:00 PM	Available	Available	Available	Available	Available	Available	Available
4:00 PM	Available	Available	Available	Available	Available	Available	Available
5:00 PM	Blocked	Available	Available	Available	Available	Available	Available
6:00 PM	Blocked	Available	Available	Available	Available	Available	Available
7:00 PM	Blocked	Available	Available	Available	Available	Available	Available
8:00 PM	Blocked	Available	Available	Available	Available	Available	Available
9:00 PM	Blocked	Available	Available	Available	Available	Available	Available
10:00 PM	Blocked	Available	Available	Available	Available	Available	Available
11:00 PM	Blocked	Available	Available	Available	Available	Available	Available

- Click on the time that you would like to "Block".
- Specify the Start and End Times using the drop-down menus. Select "Blocked" for the Window Type.



- Click "Set Time Block."
  - **NOTE:** CORES will not show the time blocks until you have saved the Resource settings.

5. Specify any additional charges that should be automatically included for this Resource. For example, if use of a particular piece of equipment will always require a certain reagent, chemical, or special maintenance, you might include those charges here.

- Click on "Add default items for this resource" to display the items currently in your price list.

Add default items for this resource.

Category	Description	Quantity	Price	Ext Price
Chemistry	Phosphorous	1.0000	3.00	3.00

- Select the category, item, and quantity just as you would in order entry.
- Click "Associate Services."
- Repeat for each item charge that should be included in the reservation.

6. Specify the email notification settings for new reservations.

- Check the boxes for each core staff member who should receive an email notification when new reservations are made.

Email Policy:

<input type="checkbox"/> Boyd, Kelli	<input type="checkbox"/> Only send emails when assistant is used.
<input type="checkbox"/> Cook, James	
<input type="checkbox"/> Cook, Megan	
<input type="checkbox"/> Doss, Stephanie	
<input type="checkbox"/> Downing, Melissa	

7. Specify the cancellation policy and terms.

**Cancellation Policy:**

- User can cancel any time prior to reservation -- Select One --
- User can cancel any time up to the day of the reservation without charge  
- Users must contact core manager to cancel day of reservation  
- Charges apply at core manager's discretion if core manager cancels
- User can cancel up to  hour(s) prior to reservation -- Select One --  
- Users must contact core manager to cancel after this time  
- Charges apply at core manager's discretion if core manager cancels
- User can cancel any time prior to reservation.  
- Cancellations before  hour(s) prior to reservation will not be charged  
- Cancellations after this time will be charged

8. Specify the terms of your Edit Policy.

**Edit Policy:**

- User can not edit reservation
- User can edit reservation up to  hour(s) prior to reservation  
- Users must contact core manager to edit the reservation after this time
- User can edit reservation at any time on the day of occurrence ?

9. Specify the time limitations on reservations.

**Limit future reservations to within:**  days ?

**Resource reservation time interval:**  hours  minutes

**Minimum reservation time period:**  hours  minutes

**Maximum reservation time period:**  hours  minutes

10. Include any special information that you would like to include for your Resource Users.

**Instructions to users:**

**Location:**

**Picture:**   ?

**Machine Name:**  ?

11. Click "Update" to save your settings.

**To set the hourly rate for the resource:**

1. Go to Maintenance Menu → Item Maintenance
2. If you have already loaded a price for usage of this particular resource, click on the item.
  - If you have not already loaded a price for this particular resource, click “Add Item” and enter the basic details.
3. Confirm that the unit of measure is *per hour*. If you have previously set your rates “per scan” or similar, you will need to refigure your rates to an equivalent hourly charge.
4. Under “Assigned Resource,” check the box next to the Resource to which this price should be associated.

**- Edit** **VUMC Test**

Fields in **bold** are required.

Status:  Active  Inactive

Core Name: TPSR - Comparative Pathology VUMC Price: \$62.00

Category: Equipment Academic Price: \$74.40

Description: Super fancy microscope #1 Corporate/Pharma Price: \$99.20

**Unit of Measure:** per hour External Price: \$74.40

Default Order Entry Item:  Meharry Price: \$66.96

PI Order Entry: Not Applicable VA Price: \$66.96

**Assigned Resources**

Super fancy microscope #1

5. Click “Update Item” to save your settings.

**Confirm that your Resource Calendar is now active:**

1. On your CORES main page, click on “Reserve Core Device.”
2. You should now see your Resource Calendar listed

Home

VANDERBILT UNIVERSITY MEDICAL CENTER

**Calendar Resource Selection** **VUMC Test**

Select up to 6 Resources:

- ▶ **TPSR - Comparative Pathology**
- Super fancy microscope #1 - Just something

Once your Resource Calendar is active, any Service Core Manager/Associate or Principal Investigator (PI) can make a reservation, as well as any Lab Managers/Assistants or Resource Users associated with them in CORES.

**NOTE:** If you have opted to require user approval before scheduling, no one will see your calendars unless you have given them access.

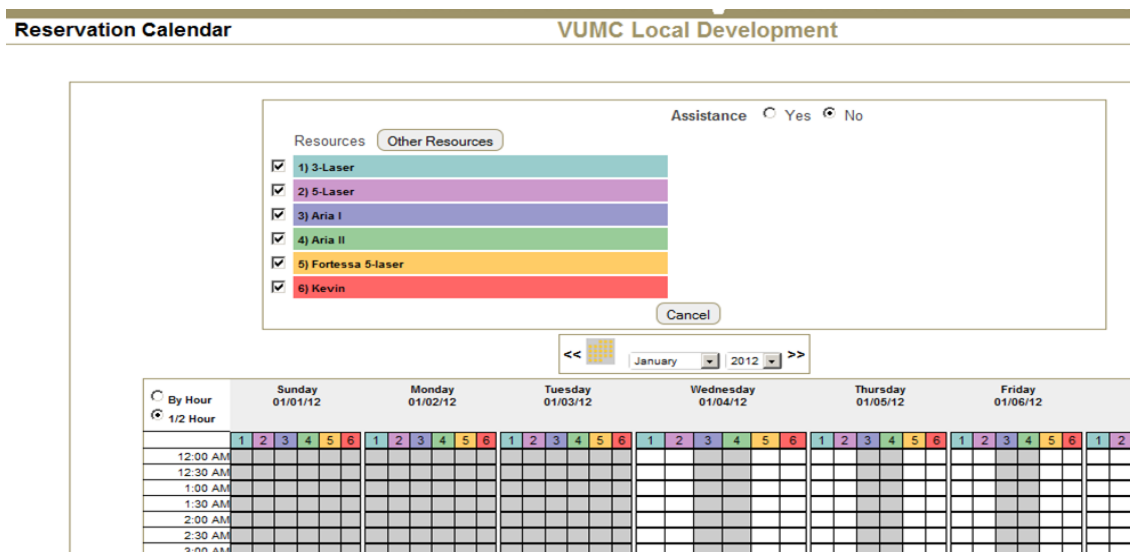
In general, users will make reservations on their own, without assistance from the core manager. However, Service Core Managers and Associates do have the ability to make reservations on a user's behalf.

**To make a reservation:**

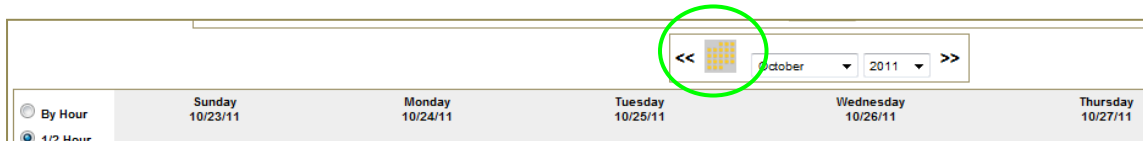
1. On your CORES main page, click on "Reserve Core Device."
2. Check the boxes next to the core instrumentation/resource you want to reserve.



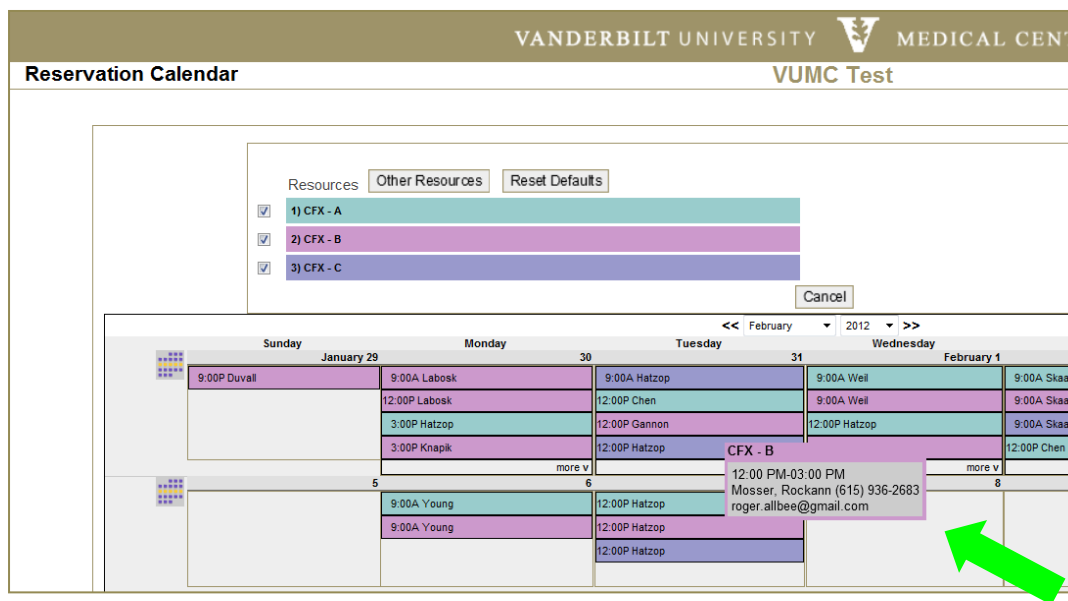
3. Click "View Calendar" to view resource availability.



The default view is by week. Select a specific day view by clicking on the date, move from week-to-week using the arrows, or view the entire month by clicking on the calendar icon:



When you mouse over the PI name, a pop-up box provides basic information about the reservation.



4. Click on the desired open time slot (no color block) in the column for the instrument you want to reserve. A detailed view is displayed on the next page.

**Resource Scheduler**

**Resource Scheduler - Selection**

**Name:** CFX - B  
**Core:** MCBR Services  
**Category:** Instrument Access  
**Description:** Real-time PCR  
**Price:** \$2.35 / hour  
**Resource Description:** Bio-Rad CFX Real time PCR Instrument  
**Resource Instructions:** CFX email run completion notification & reports, not data file, sent to Vanderbilt email accounts; notification, reports & data file sent to non Vanderbilt email accounts.  
**Minimum Reservation:** 3 hours  
**Maximum Reservation:** 3 hours  
**Cancellation Policy:** User can cancel any time prior to reservation, cancellations within 1 hour (s) prior to reservation will be charged a 100.00 percent fee of the total reservation.

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Use the dropdown to select appropriate PI and Cost Center

Select Start and End Times

Add specific comments, as desired.

**Name:**

**Center Number:**

**Reservation Date:** 10/27/11

**Start Time:** 12:00 AM ▾

**End Time:** 3:00 AM (3 hour(s) ) ▾

**Comments:**

512 characters left

Note\*: Any applicable pricing modifiers will be applied when this reservation is generated into an order. Also, all prices are subject to change without notice.

5. After completing the form, click Submit. Your reservation will automatically and immediately appear on the core calendar. Confirmation details appear in the next screen view.

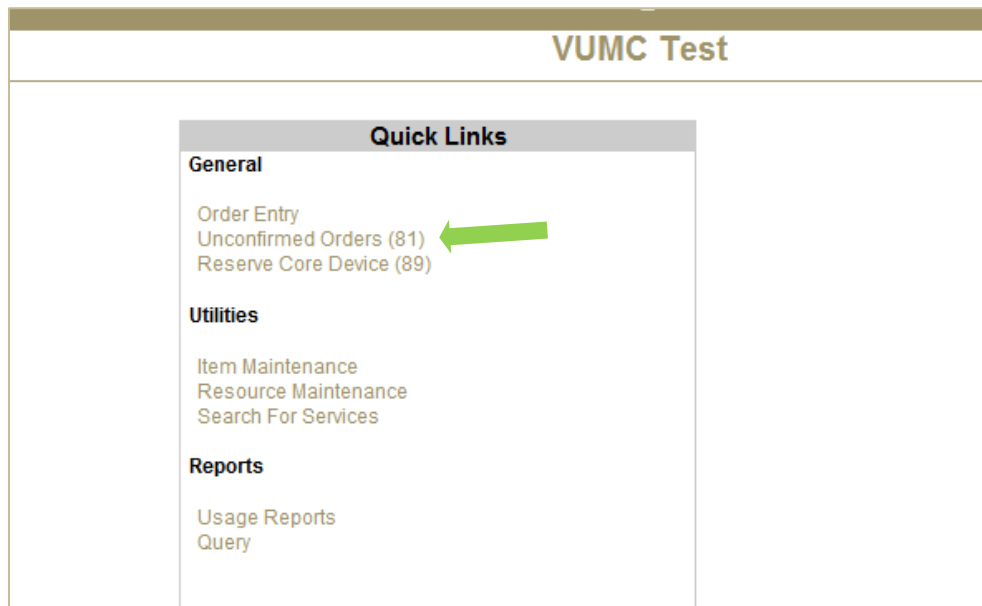
**To edit or cancel a reservation:**

1. On your CORES main page, click on **Reserve Core Device**
2. Select the core and resource that you reserved
3. In the calendar view, click on your reservation block
4. Scroll to the bottom of the reservation summary information
5. Click on **Cancel Reservation**



## To confirm a reservation for billing:

After the reservation time has passed, CORES will automatically convert the reservation to an "Unconfirmed Order," which will show up on your CORES main page:



1. On your CORES main page, click on "Unconfirmed Orders."
2. Click on the Reservation Confirmation number to view the reservation and review for accuracy. Individual reservations may also be deleted at this point – for example, if the equipment malfunctioned, you could delete the reservation to ensure that the user is not charged.

Unconfirmed Orders VUMC Test Mar 22, 2013 at 0

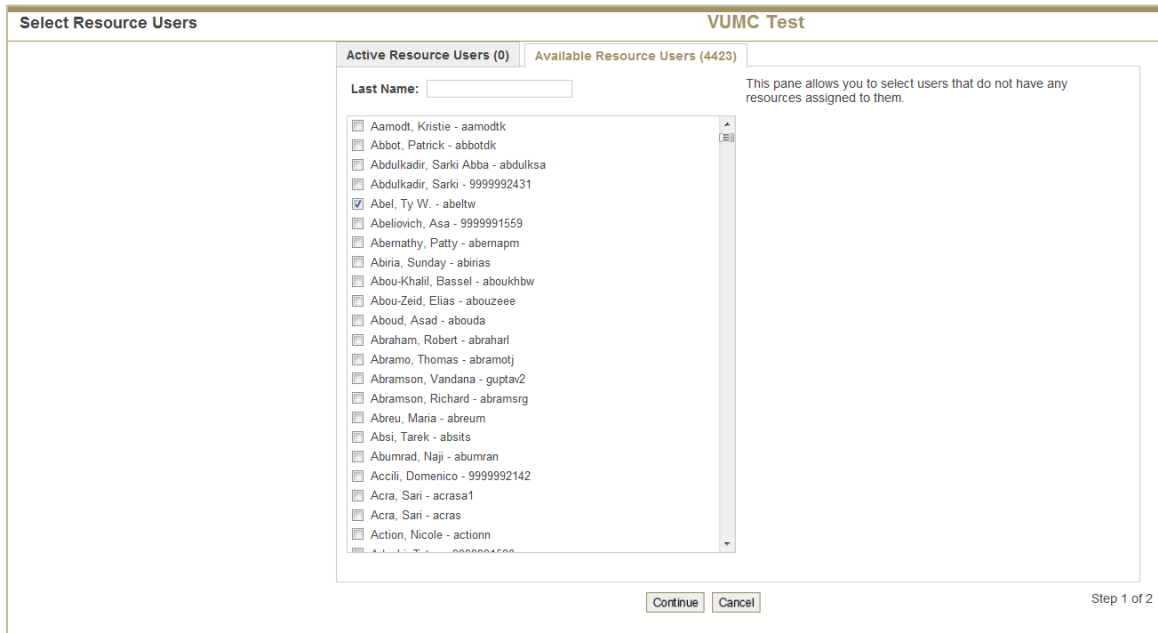
Reservation Confirmation Nbr	Center Number	Description	Reservation Date	PI Name	Resource User	Resource	Primary Resource Qty	Project	Order Amount
<input checked="" type="checkbox"/>	Select/Deselect All								
<input checked="" type="checkbox"/> 20130301-117	V0000013493	CRC Research	03/21/13	Clauss, Jacqueline		3T-B daily	1.5	BLACKFORD-30389	\$750.00
<input checked="" type="checkbox"/> 20130124-68	4282300861	HD067254-01PREDICTING LATE-EMERGING RD	03/21/13	Cutting, Laurie	Delheimer, Jule	3T-B daily	1		\$500.00
<input checked="" type="checkbox"/> 20130111-70	4043517006	Novo Nordisk investigator-initiated weight loss stud	03/21/13	Niswender, Kevin	Fister, Matthew	3T-A daily	2.5		\$1,250.00
<input checked="" type="checkbox"/> 20130226-40	4206610801	EY017082 NEURAL REPRESENTATION OF FEATURES IN THE HUMAN VISU	03/21/13	Tong, Frank		3T-B daily	2.5	TONG F - 30311	\$1,250.00
<input checked="" type="checkbox"/> 20130123-86	4043517006	Novo Nordisk investigator-initiated weight loss stud	03/21/13	Niswender, Kevin	Fister, Matthew	3T-A daily	1		\$500.00
<input checked="" type="checkbox"/> 20130123-85	4043517006	Novo Nordisk investigator-initiated weight loss stud	03/20/13	Niswender, Kevin	Fister, Matthew	3T-A daily	2.5		\$1,250.00
<input checked="" type="checkbox"/> 20130304-71	4206610801	EY017082 NEURAL REPRESENTATION OF FEATURES IN THE HUMAN VISU	03/20/13	Tong, Frank		3T-B daily	2.5	TONG F - 30311	\$1,250.00
<input checked="" type="checkbox"/> 20130301-118	V0000013493	CRC Research	03/20/13	Clauss, Jacqueline		3T-B daily	1.5	BLACKFORD-30389	\$750.00
<input checked="" type="checkbox"/> 20130219-78	1042709118	VIOM Pilot Project	03/20/13	Welch, Brian	Gifford, Ailya	3T-A daily	1.5	WELCH B - 30356	\$750.00
<input checked="" type="checkbox"/> 20130301-116	V0000013493	CRC Research	03/19/13	Clauss, Jacqueline		3T-B daily	1.5	BLACKFORD-30389	\$750.00
<input checked="" type="checkbox"/> 20130111-89	4043517006	Novo Nordisk investigator-initiated weight loss stud	03/19/13	Niswender, Kevin	Fister, Matthew	3T-A daily	2.5		\$1,250.00
<input checked="" type="checkbox"/> 20130216-4	4282300861	HD067254-01PREDICTING LATE-EMERGING RD	03/19/13	Cutting, Laurie	Delheimer, Jule	3T-B daily	1		\$500.00

3. You may do a "mass approval" of all unconfirmed orders by simply checking all of the boxes and clicking "Confirm Orders" at the bottom of the page.

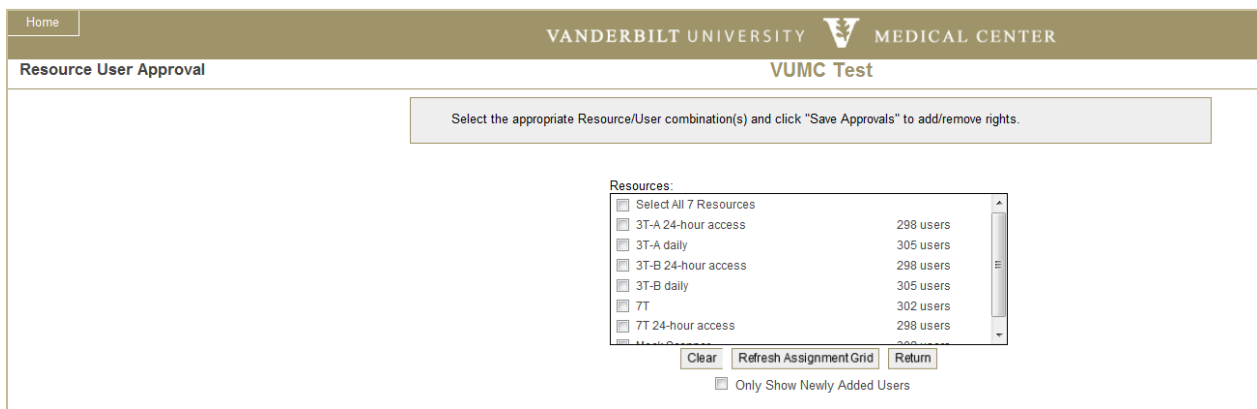
**NOTE:** This process must be done every month in order to ensure timely billing. Unconfirmed orders that are still outstanding at the time of the monthly upload will be automatically deleted and the core will not be able to receive payment.

**To approve a user for a resource:**

1. Go to Maintenance Menu → Resource User Approval.
2. Click on the tab for "Available Resource Users."
3. Check the box next to the name of the user.
4. If the user logs in to CORES as a Lab Manager/Assistant, check the name of their PI as well.



5. Click "Continue" at the bottom of the screen.
6. Check the boxes for the equipment that the user should be able to see.



7. Click "Refresh Assignment Grid"

8. Check the boxes for each piece of equipment to which the user should have access.

Only Show Newly Added Users

Resource Users	3T-A 24-hour access	3T-A daily	3T-B 24-hour access	3T-B daily	7T	7T 24-hour access	Mock Scanner
Abdulkadir, Sarki	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Abiria, Sunday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Abou-Khall, Bassel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Abraham, Robert	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Step 2 of 2

9. Click "Save Approvals" at the bottom of the screen.

## Troubleshooting

### **A user cannot log in to CORES.**

If they have not yet requested a CORES user account, please have them submit their request online at <https://www.mc.vanderbilt.edu/root/vumc.php?site=CFUIS&doc=13512>. New accounts are usually confirmed with one business day.

If they already have an active account, please have them contact the Office of Research directly at [CORESemail@vanderbilt.edu](mailto:CORESemail@vanderbilt.edu)

### **How do I schedule a reservation for a non-VUMC customer?**

Investigators outside Vanderbilt do not have access to CORES at this time. These users will need to contact you directly to request that you make the reservation for them.

### **A Resource User does not see the appropriate PI as an option.**

Please have them contact the Office of Research directly at [CORESemail@vanderbilt.edu](mailto:CORESemail@vanderbilt.edu)

### **A user cannot see the resource/equipment that they need.**

Most likely, this user has not been approved as a user for that piece of equipment. Please see above "[To approve a user for a resource](#)" and ensure that they have been given the appropriate access.

### **A Resource User does not see the center number that they need.**

Their PI will need to manually grant them access to each center number or scholarship that they should use. Please refer them to the [Reservations User Manual](#) on the Office of Research – CORES website for more specific directions.

### **Oops! A PI/Resource User picked the wrong center number.**

Depending on your Edit Policy, the PI/Resource User may be able to edit the center number in the reservation at any time up until the cancellation window. To do so, simply navigate back to the core calendar and click on your reservation. CORES will allow you to change the date, time, center number, etc. Please see above "[To edit or cancel a reservation](#)"

If the reservation time has already passed and the order is confirmed, you (or the PI) can change the center number in CORES by going to Entry → Center Number Correction/Distribution.

If the invoice has already been created, please direct the user to work with their Department Administrator to submit a manual correction (Journal Entry).