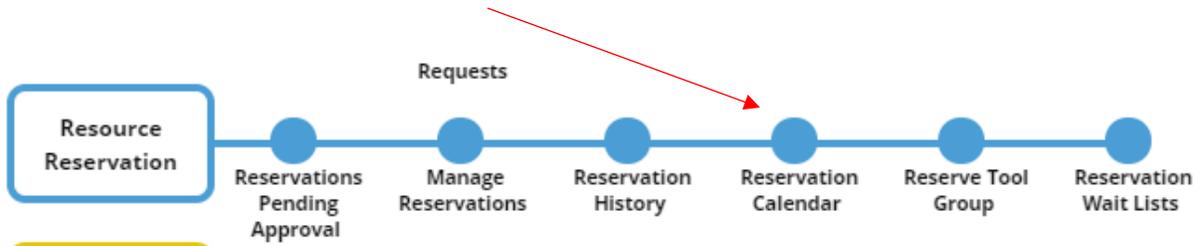


How to Request a Krios Cryo-TEM (TEM3) Reservation in CoreResearch

1. LOGIN to CoreResearch@Duke at <https://coreresearch.duke.edu/> using your Duke NetID and password
2. The Tramline Page will display.
3. Select the Reservation Calendar Tramstop from the Resource Reservation Tramline.



4. The Resource Calendar will display. From the Select Core pull down menu, select “Shared Materials Instrumentation Facility (SMIF)” and from the Group pull down menu, select “Electron Microscopes”

Select the desired start of your reservation on the calendar. Note that the start date must be at least one week ahead of the current date. Then double click on the desired starting time block for the TEM3: FEI Cryo-TEM instrument. The starting time is the time that your samples will be loaded into the Krios, and should be a weekday morning.

1. Select SMIF: Cryo-EM Facility as the Core

2. Select Cryo-Em Instruments as the Group

3. Select the desired start date of your reservation

4. Double click on the desired start time

Day	12:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	
- Friday, 04/29/2022																						
TEM.3: FEI Krios Cryo-TEM																						
- Saturday, 04/30/2022																						
TEM.3: FEI Krios Cryo-TEM																						
- Sunday, 05/01/2022																						
TEM.3: FEI Krios Cryo-TEM																						
- Monday, 05/02/2022																						
TEM.3: FEI Krios Cryo-TEM																						
- Tuesday, 05/03/2022																						
TEM.3: FEI Krios Cryo-TEM																						
- Wednesday, 05/04/2022																						
TEM.3: FEI Krios Cryo-TEM																						

5. The Resource Reservation Event window will display with the start date and time that you selected. You may modify the reservation start time further if needed. Select the Reservation End Date by clicking on the calendar icon next to this field, and select an estimated Reservation End Time from the pull-down menus in this field. Note that the Krios should be reserved in 24 hour time slots, with a minimum reservation time of 24 hours (1 day) and a maximum reservation time of 72 hours (3 days). Contact SMIF for special requests of shorter or longer reservation times.

7. You must enter a Project ID (e.g. fund code or account number). Click on the arrow icon next to the box for Project ID.

8. Leave the “Search Project ID/Project Title” blank and click on the magnifying glass beside this field to display a list of all the project/fund codes that you have access to in the system. Select the desired fund

code from the list by clicking in the circle next to the Project ID. Then click “Select & Return” at the top of the page.

2. Select the desired fund/project code

Project ID	Title	Principle Investigator	Financial Manager 1	Project Status
PR-10358	3916762_ALSTADT-WALTERS	Mark D Walters(mwalters)	Susan L Bonifield(bonif001)	●
PR-21236	0004570119_SMIF MINOR ACQUISITI	Mark D Walters(mwalters)	Melissa Kerr(mak83)	●
PR-23172	0004514186_MATERIALS SCI INITIA	Mark D Walters(mwalters)	Mark D Walters(mwalters)	●
PR-26776	0004510064_SHARED INSTRUMENTATI	Mark D Walters(mwalters)	Mark D Walters(mwalters)	●
PR-26827	0004510170_SMIF USER COSTS	Mark D Walters(mwalters)	Mark D Walters(mwalters)	●
PR-27720	3916941_INSTRUMENTATION AND RES DEV SUPPORT	Mark D Walters(mwalters)	Melissa Kerr(mak83)	●

3. Click “Select & Return” once the appropriate fund code has been selected

9. You must enter the following information in the “Experiment Information” box:

- Project approval code (assigned by the review committee)
- Person who will load and run the sample: (SMIF or approved Super-User)
- Your cell phone number (so we can notify you if needed)
- Optional: Express queue instructions

Enter information in the “Experiment Information” box

10. After all necessary fields have been completed, click “Save”. The system will check to make sure the reservation is allowed. The Resource Reservation Event window will re-appear with an assigned Reservation ID number, and an option to Modify reservation. Click the “Submit for Approval” button at the top of the screen to finish making the reservation. **If you don’t click “Submit for Approval” the reservation will not be made.**

1. Click Save.

Resource Reservation Event

Reservation

Life Cycle

1. Initial/Cancelled/Rejected Next: Submit for Approval	2. Pending Approval	3. Approved	4. Completed
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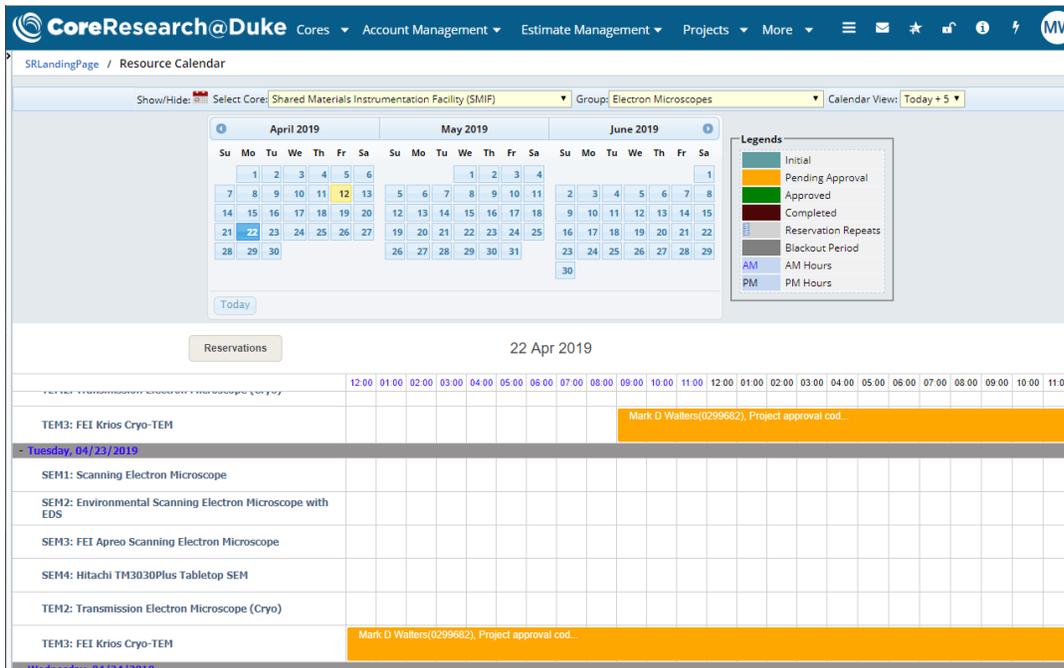
Instrument: TEM3: FEI Krios Cryo-TEM
 Reservation ID: RES-0000259754
 Status: Initial
 Core: Shared Materials Instrumentation Facility (SMIF)
 Project ID: PR-10358
 Project Name: 3916762_ALSTADT-WALTERS
 Reserved By Name: Mark D Walters (mwalters)
 Reserved For Name: Mark D Walters (mwalters)
 Reservation Start Date: 04/22/2019
 Reservation End Date: 04/24/2019

Services Performed Attachments

IU	TR	PT	Service ID	Service Name	#	Status	Assigned To	Fulfillment Date	Fulfilled By	Billable	Rate (\$)	Unit	Actual Quantity	Actual Cost (\$)	Billable Quantity	Billable Cost (\$)	Project Title	Membership	Affiliation	Invoice ID	Invoice Creation Date
No records found																					

2. You must click “Submit for Approval” to make your reservation

11. After clicking “Submit for Approval”, the calendar view will reappear with your block of time shown in yellow as Pending Approval.



12. SMIF will review the reservation request. If the information in the reservation request satisfies the Krios reservation policies, the reservation will be approved. If the reservation request is not approved, the requestor will be contacted and SMIF will discuss how the reservation can be modified to meet the reservation policies.

When the reservation is approved, SMIF will send e-mail to the requester to verify approval and provide any additional instructions. The reservation in the calendar view will now be shown in green as Approved.

Note: You can have the CoreResearch system automatically send you email notification when a reservation request is approved by changing your personal notification preferences. A guide on “How to Manage Email Notifications” can be found at <https://medschool.duke.edu/node/100236>. (Scroll down to the System Functionality Section of this web page).

Holding the cursor over the reservation will create a pop-up window that provides additional information about the reservation.

Double-clicking on the reservation will re-open the Resource Reservation Event window for additional details and for modifying or cancelling the reservation (see next page).

Modifying or Cancelling a Krios Cryo-TEM (TEM3) Reservation in CoreResearch

Reservations may be cancelled or modified by the user up to 3 days in advance of the reservation. Contact SMIF if a reservation needs to be changed within 3 days of the reservation start.

Double click the reservation in the Resource Calendar View to open the Resource Reservation Event window.

Resource Reservation Event

Reservation [Modify Reservation] Maintenance [Stop] [Start] [Extend] [Reduce] [Cancel Reservation] [Update Actual Usage] [Close]

Reservation | Billing Info | Usage Log | Safety Assessment

Life Cycle	1. Initial/Cancelled/Rejected	2. Pending Approval	3. Approved	4. Completed
Tool Group Reservation?				
Instrument	TEM3: FEI Krios Cryo-TEM			
Reservation ID	RES-0000259754	Status	Approved	
Core	Shared Materials Instrumentation Facility (SMIF)			
Private?	No	Project ID *	PR-10358	
Project Name	3916762_ALSTADT-WALTERS	Reserved By Unique ID	0299682	
Reserved By Name	Mark D Walters (mwalters)	Reserved For Unique ID *	0299682	
Reserved For Name	Mark D Walters (mwalters)	Reserved For Email	mark.walters@duke.edu	
Reserved For Phone	+1 919 660 5486	Reservation Start Date *	04/22/2019	
Reservation Start Time	09:00 AM	Reservation End Date *	04/24/2019	
Reservation End Time	09:00 AM			
Activity				
Location		Assistance required ?	No	
Repeat required ?	No	Repeat Type		
Repeat End Date		Repeat Every	<input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday	
Reserved on	04/12/2019 11:52:56 AM	Parent Request ID		
Experiment Information	Project approval code: 041719-1 Samples will be loaded by: SMIF Cell phone number: 555-5555			

Services Performed

IU	TR	PT	Service ID	Service Name	#	Status	Assigned To	Fulfillment Date	Fulfilled By	Billable	Rate (\$)	Unit	Actual Quantity	Actual Cost (\$)	Billable Quantity	Billable Cost (\$)	Project Title	Membership	Affiliation	Invoice ID	Invoice Creation Date
No records found																					

The button selections at the top of the page can be used by the User/Requestor for the following actions:

- **Modify Reservation:** allows the user to change the start and end dates and times of the reservation
- **Maintenance:** can be used to add additional notes if needed
- **Cancel Reservation:** allows the user to cancel the reservation and remove it from the calendar
- **Close:** Closes this window and returns to the Resource Calendar view

The following button selections should only be used by SMIF staff or the Super-User loading and running the samples:

- **Stop:** Selected if the Krios data collection finishes before the reservation end-time
- **Start:** Selected if the sample loading begins before or after the reservation start time
- **Extend:** Selected to extend the reserved time if needed during the data collection (and if time is available)
- **Reduce:** Selected to reduce the reserved time if needed during the data collection
- **Update Actual Usage:** Selected if needed to correct start and end times after the reservation time has passed