How to Add a Facility User and Link to a Project
MGC
CoreResearch@Duke: How to Add a Facility User and Link to a Project

Question:
How do I add a Facility User in CoreResearch@Duke and link them to a project?

Answer:

For Principal Investigators, Principal Investigator Delegates, Financial Managers, and Financial Administrators:

**Adding a Facility User - Linking Facility User to a PI (STEP 1 of Linking Process)**

1. Access CoreResearch@Duke
2. From the 'Account Management' Tramline, click 'Manage PI Tramstop.'
3. Click 'OK' and a list of PIs will be displayed who share your fund code.
4. Click on the 'Duke Unique ID' to manage.

5. NOTE: The bottom tab displays all the current Facility Users associated with the PI on the 'Manage PI' page.
6. Click on the 'Add Facility User' button.

7. Type the NetID - OR - the First Name - OR - the Last Name in the 'Search Unique ID/NetID/Name' field.

8. Select the name you wish to associate as a Facility User to the PI. Multiple Facility Users can be added by clicking the 'search Multiple NetIDs' link and entering a list of NetIDs separated by semicolons. Click the checkbox of each Facility User you would like to add.

9. You will receive a message confirming the 'Operation was Successful' and click on 'OK' in the 'Processing Status' box.
10. The Facility User(s) you selected will be displayed in the ‘Facility Users’ tab. You must select the Active checkbox for the newly added Facility User and click Save in order for them to be able to be added to a Project.

10. Click ‘Save’ to store your changes.

This Operation has accomplished three actions:
The Facility User account has been created
A Job type of Facility User has been assigned to the user.
The Facility User has been linked to the Principal Investigator (PI).
Assigning Facility Users as Members of a Project (STEP 2 of Linking Process)

1. LOGIN to CoreResearch@Duke.
2. The Tramline page will display.
3. From the 'Projects' tramline, click 'Manage Projects' tramstop
4. The 'Project List' page will display, if this is your first time on this page, you will need to click the spyglass next to the search box the refresh the page.

**CoreResearch@Duke** Core Management - Account Management - Estimate Management - Projects - Manage Services - Manage Invoice - Reporting - System Guide

### Project List

<table>
<thead>
<tr>
<th>Project ID/Project Title</th>
<th>Title</th>
<th>Principle Investigator</th>
<th>Financial Manager 1</th>
<th>Project Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>PR-01451</td>
<td></td>
<td></td>
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<td>PR-09722</td>
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<tr>
<td>PR-43495</td>
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</tbody>
</table>

5. Click on the Project ID to edit a single Project, or for multiple projects, select the Projects you would like to modify and click 'EDIT'.

**Click the spyglass to show all Projects**

![Image of the 'Project List' page with a search bar highlighted and annotations pointing to the search bar and the spyglass](image-url)
6. Click ‘Add New’ button on the Members Tab to add one or more facility users

7. Select the facility users to be associated with the project and click the ‘Select and Return’ button and the users will be assigned to the project. If this is your first time in this page, you will need to click “OK” next to the search box to refresh the page.

8. Click ‘Save’ to store the change. Note: the Active box will automatically be checked giving the Project Member permission to bill to the project. An inactive project member stays on the Project for historical reference, but cannot bill to the project.