

# 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

☆☆☆☆☆ 721 views

## 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.

The screenshot shows the 'Manage PI 0111381' interface in CoreResearch@Duke. The top navigation bar includes 'Cores', 'Account Management', 'Estimate Management', 'Projects', 'Manage Services', 'Manage Invoice', 'Reporting', and 'System Guide'. The main content area has tabs for 'User', 'Facility Users', 'Membership', 'Fund Source', and 'Invoice Contacts'. The 'Facility Users' tab is active, displaying a table with columns: Duke Unique ID, Net ID, First Name, Middle Name, Last Name, and E-mail. A search dialog is open, showing a search bar with 'tj4' and a 'Select & Continue...' button. The search results table lists the following data:

Duke Unique ID	Net ID	First Name	Middle Name	Last Name	E-mail
<input checked="" type="checkbox"/> 30	tj4				
<input type="checkbox"/> 04	jtj4				
<input type="checkbox"/> 05	tj41				
<input type="checkbox"/> 06	tj45				
<input type="checkbox"/> 06	tj47				

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.

Manage PI 0111381

Save Return Other Tasks

User

NetID		Duke U
First Name *		Middle
Full Name		
Email *		
Phone		

Facility Users Membership Fund Source Invoice Contacts

Duke Unique ID	Name
<input type="checkbox"/> 05	jls87)

1 Add Facility User Remove Facility User

vlt-lvqa01:8080/CR/rc?command=page&page=DMFULookup - Google Chrome

Not secure | vlt-lvqa01:8080/CR/rc?command=page&page=DMFULookup

Close Select & Continue... 4

Search Bar << 1 - 4 Select & Continue...

Search Unique ID/ NetID/ Name: 3

OK

Search By Query: 4

Search multiple NetIDs: ByFirstandLastName

Duke Unique ID	Net ID	First Name	Middle Name	Last Name	E-mail
<input checked="" type="checkbox"/> 04	jra16				
<input checked="" type="checkbox"/> 06	alm90				
<input checked="" type="checkbox"/> 06	jkg22				
<input checked="" type="checkbox"/> 07	jm511	Joseph		Mclean	joseph@mclean@duke.edu

1 - 4 of 4

NetID 2

alm90;jra16;jkg22;jm511

OK

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.

**CoreResearch@Duke** Cores ▾ Account Management ▾ Estimate Management ▾ Project

Manage PI 0111381

Other Tasks ▾

^ User **2**

NetID	eray	Duke Unique ID *	0111381	
First Name *	Ellen	Middle Name	M	Last Name *
Full Name	Ellen M Ray			
Email *	eray@duke.edu			
Phone	+1 919 660 5122			

Facility Users   Membership   Fund Source   Invoice Contacts   Projects   Study

<input type="checkbox"/>	Duke Unique ID	Name	Active?	PI Delegate?
<input type="checkbox"/>	0529168	Jeffrey L Schaal (jls87)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0416962	Jared R Atherton (jra16)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0715735	Joseph McClean (jm511)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0691201	Jeremy K Guill (jkg22)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0646124	Angelica Morgan (alm90)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.

Project List

+ Add New Edit List Control Activate On Hold Other Tasks

Search Project ID/Project Title: Search By Query Show Advanced Search

[ 0 selected ] 1 - 115 of 115 Group By PI:

Project	Title	Principle Investigator	Financial Manager 1	Project Status
PI: 0056997 - Adam P Wax( apw2 ) (14)				
SAP PR-01451	20	A		●
SAP PR-09722	39	A		●
SAP PR-41350	33	A		●
SAP PR-43495	20	A		●

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'.

6. Click 'Add New' button on the Members Tab to add one or more facility users

Edit Project PR-48005

 Save  Return

Project **Billing Info**

Project *	PR-48005
Title *	0004511298_WEST MEDX
PI *	0111381
PI Name	Ellen M Ray (eray)
Project Detail	
All Cores?	<input checked="" type="checkbox"/>

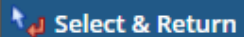
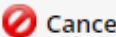
Members **Cores - Affiliation** Attachments

**1**  
 Add New  Delete

<input type="checkbox"/>	Duke Unique ID	Full Name	Active?	End Date
No records found				


Select User - Google Chrome

Not secure | vlt-lvqa01:8080/CR/rc?command=page

Select User **3**  Select & Return  Cancel

Advanced Search  Returns the Selected Item(s) to the Calling Page (CTRL + R) Query

Search By Category

Search multiple NetIDs:  Add New  Clear

[ 3 selected ] 1 - 4 of 4

<input type="checkbox"/>	Net ID	Duke Unique ID	Full Name
<input checked="" type="checkbox"/>	jra16		
<input type="checkbox"/>	alm90		
<input checked="" type="checkbox"/>	jkg22		
<input checked="" type="checkbox"/>	jm511		

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 the 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.