

Question:

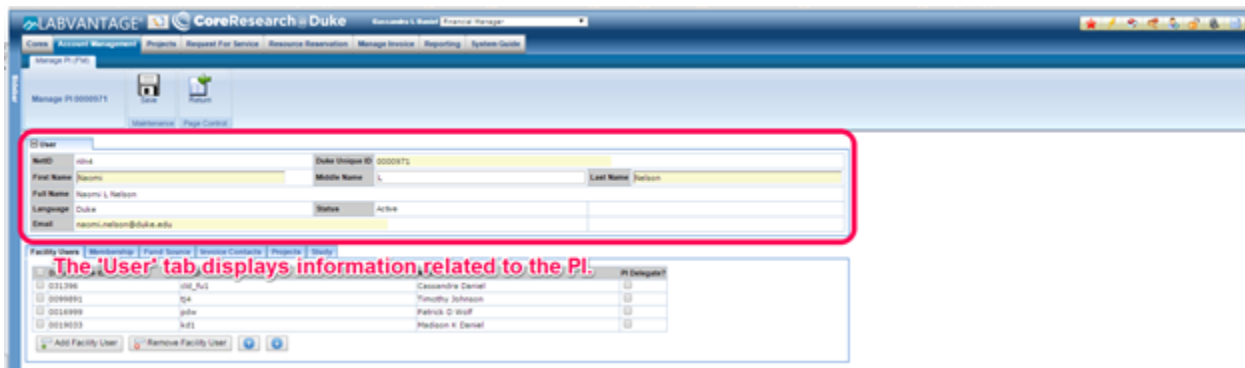
How do I add a Facility User in CoreResearch@Duke and link them to a project?

Answer:

For Principal Investigators, Principal Investigator-Delegates, Financial Managers, and Financial Administrators.

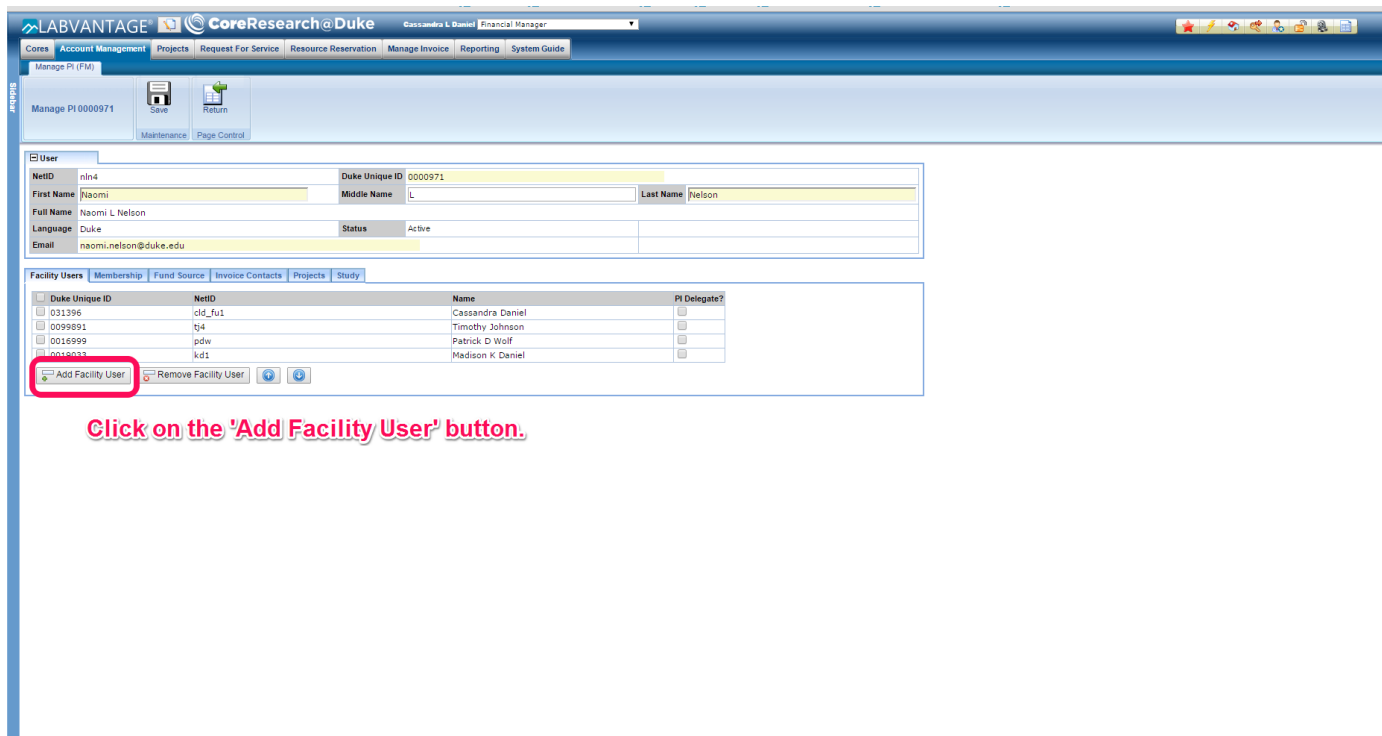
Adding a Facility User – Linking Facility User to a PI (STEP 1 of Linking Process)

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.

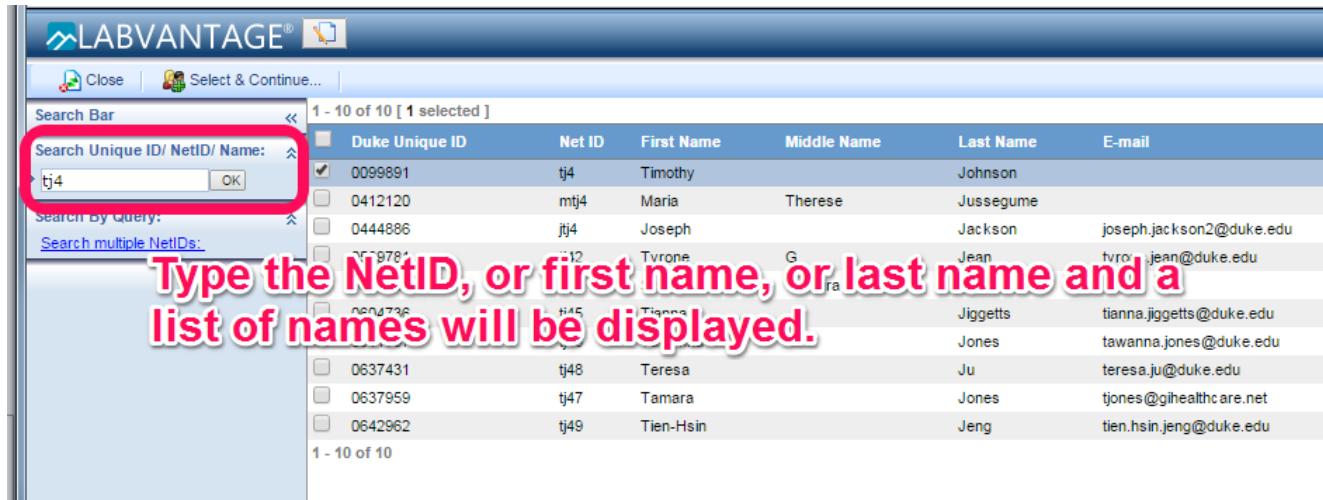


5. NOTE: The bottom tab displays all the current Facility Users associated with the PI on the 'Manage PI' page.

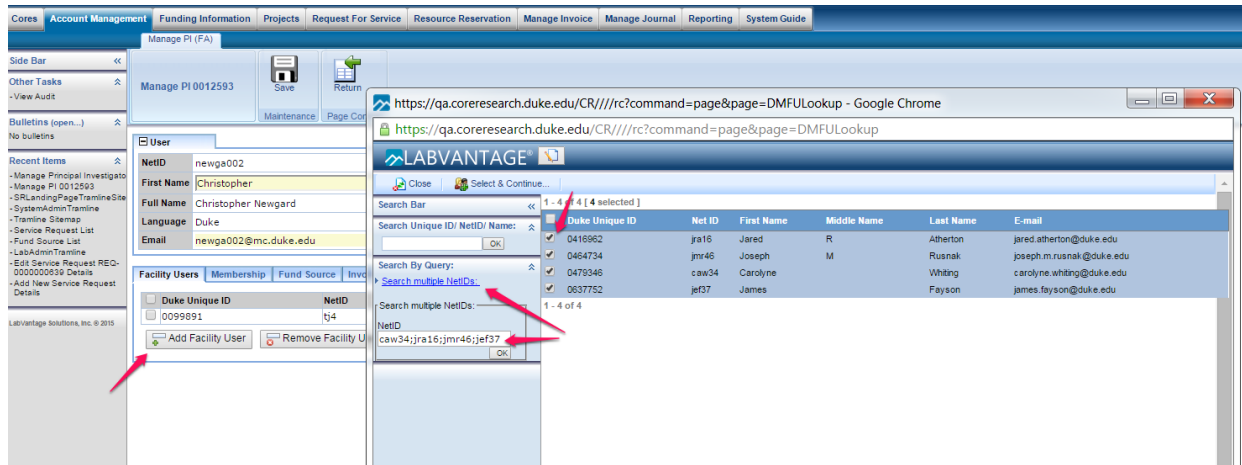
6. Click on the 'Add Facility User' button.



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



7. 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.



8. You will receive a message confirming the 'Operation was Successful' and Click on 'OK' in the 'Processing Status' box.

9. The Facility User(s) you selected will be displayed in the 'Facility Users' tab.

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 "OK" next to the search box the refresh the page.

Click to refresh the page

Project	Title	PI	Financial Manager 1	Status	Account Number
PR-00779	3998310_UNDESIGNATED REAL ESTATE	Jeffrey H Potter (jpotter)	Jeffrey H Potter (jpotter)	Active	3998310
Ph: 0008370 - P.J. Eric Stallard					
PR-00858	3997425_E_STALLARD DISC FUND	P.J. Eric Stallard (stall013)	Tanva D Exum Costoni (tanva)	Active	3997425
Ph: 0008397 - Rosalyn B Ritts					
PR-00780	3998319_CVD-UNIV STOCK	Rosalyn B Ritts (ritts002)	F Dozier (dozie002)	Active	3998319
PR-01002	3995015_CVD-MED CTR STOCK	Rosalyn B Ritts (ritts002)	F Dozier (dozie002)	Active	3995015
Ph: 0010777 - Jeanne B Kirschner					
PR-00391	0004590237_GSP SCIENCE SOCIETY	Jeanne B Kirschner (jbkirsch)	Melissa Segal (mds55)	Active	0004590237

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

LABVANTAGE® CoreResearch@Duke

Caroline Whiting Financial Administrator

Manage Projects Historical Projects

Edit Project PR-00780

Project: PR-00780 Status: Active

Title: 3998319_CVD-UNIV STOCK

PI: 0008397

PI Name: Rosalyn B Ritts (ritts002)

Members: Add New Delete

Select User - Google Chrome

LABVANTAGE®

Select User

Search within ID/Name/Net ID

Search By Query: All Users

Search By Category:

Search multiple NetIDs:

Net ID	Full Name	Full Name
vandi002	Dave Vandine	Dave Vandine (vandi002)
<input checked="" type="checkbox"/>	kad37	Kathryn Davelaar (kad37)
<input type="checkbox"/>	jef37	James Fayson (jef37)
<input checked="" type="checkbox"/>	mfd14	Macey F Davenport (mfd14)
<input checked="" type="checkbox"/>	ald53	Ashley L Davenport (ald53)

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.