

How to Add a Facility User and Link to a Project

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.

 **CoreResearch@Duke** Cores ▾ Account Management ▾ Estimate Management ▾ Projects ▾ Manage Services ▾ Manage Invoice ▾ Reporting ▾ System Guide ▾

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
☐	05	

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

Search Unique ID/ NetID/ Name: 2 

Search By Query:

Search multiple NetIDs: ByFirstandLastName

Search multiple NetIDs:

NetID



1 - 5

Select & Continue...

☐	Duke Unique ID	Net ID	First Name	Middle Name	Last Name	E-mail
☒	30	tj4				
☐	04	jtj4				
☐	05	tj41				
☐	06	tj45				
☐	06	tj47				

1 - 5 of 5

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.

CoreResearch@Duke Cores Account Management Estimate Management Projects Manage Services Manage Invoice Reporting System Guide

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

05 jls87

1 Add Facility User Remove Facility User

Search Bar

Search Unique ID/ NetID/ Name: OK

Search By Query:

Search multiple NetIDs: ByFirstandLastName

Search multiple NetIDs:

NetID alm90;jra16;jkg22;jm511 2 OK

1 - 4 of 4

Select & Continue... 4

Duke Unique ID	Net ID	First Name	Middle Name	Last Name	E-mail
04	jra16				
06	alm90				
06	jkg22				
07	jm511	Joseph		McKean	joseph.mckean@duke.edu

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

 Save *

 Return

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

☐	Duke Unique ID	Name	Active?	PI Delegate?
☐	0529168	Jeffrey L Schaal (jls87)	☐	☐
☐	0416962	Jared R Atherton (jra16)	☒	☐
☐	0715735	Joseph McClean (jm511)	☒	☐
☐	0691201	Jeremy K Guill (jkg22)	☒	☐
☐	0646124	Angelica Morgan (alm90)	☒	☐

 Add Facility User

 Remove Facility User





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).

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.

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



Cores

Account Management

Estimate Management

Projects

Manage Services

M

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?	☒

Members

Cores - Affiliation

Attachments

1

Add New

Delete

☐	Duke Unique ID	Full Name	Active?	End Date
No records found				

Select User - Google Chrome

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

3

Select User

Select & Return

Cancel

Advanced Search

Search By Category

Search multiple NetIDs:

Add New

Clear

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

[3 selected] 1 - 4 of 4

☐	Net ID	Duke Unique ID	Full Name
☒	jra16		
☐	alm90		
☒	jkg22		
☒	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.