

## 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 'Manage PI' page in LABVANTAGE CoreResearch@Duke. The 'PI User' tab is selected, showing user details for 'naomi' with Duke Unique ID 0000971. A red box highlights the user details. Below, the 'Facility Users' tab is visible, showing a list of users with a red text overlay: 'The 'User' tab displays information related to the PI.'

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.

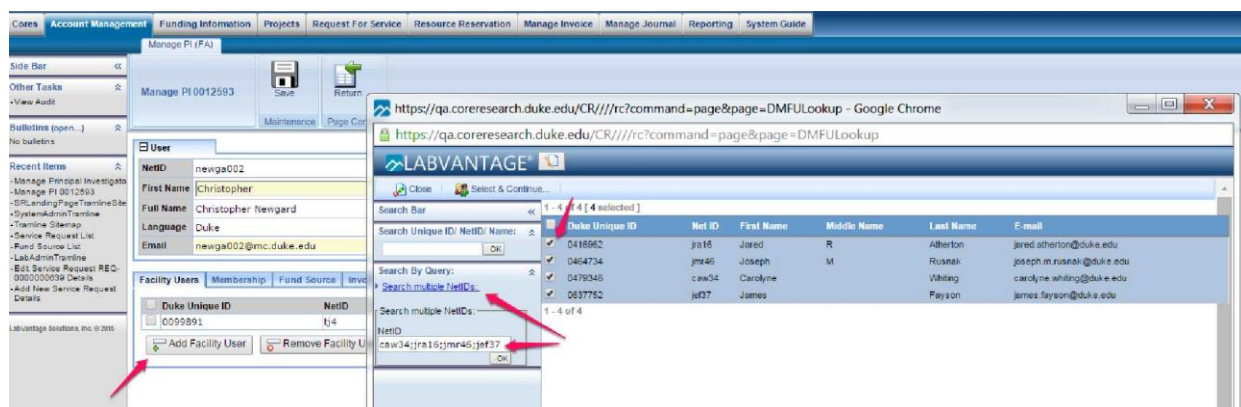
The 'Manage PI' page in LABVANTAGE CoreResearch@Duke. The 'Facility Users' tab is selected, showing a list of users. The 'Add Facility User' button is highlighted with a red box and a red text overlay: 'Click on the 'Add Facility User' button.'

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.
11. Click 'Save' to store your changes.

**This Operation has accomplished three actions:**

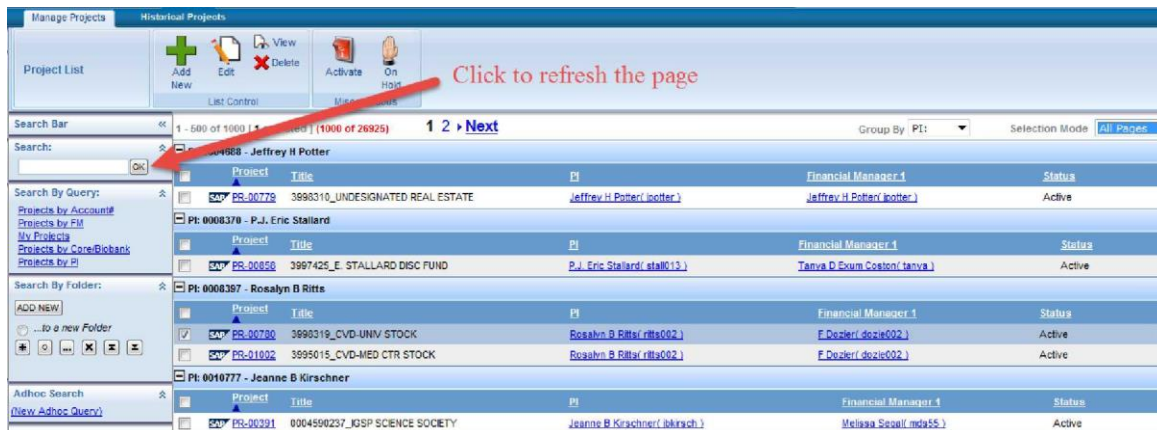
The Facility User account has been created

A job type of Facility User has been assigned to the user.

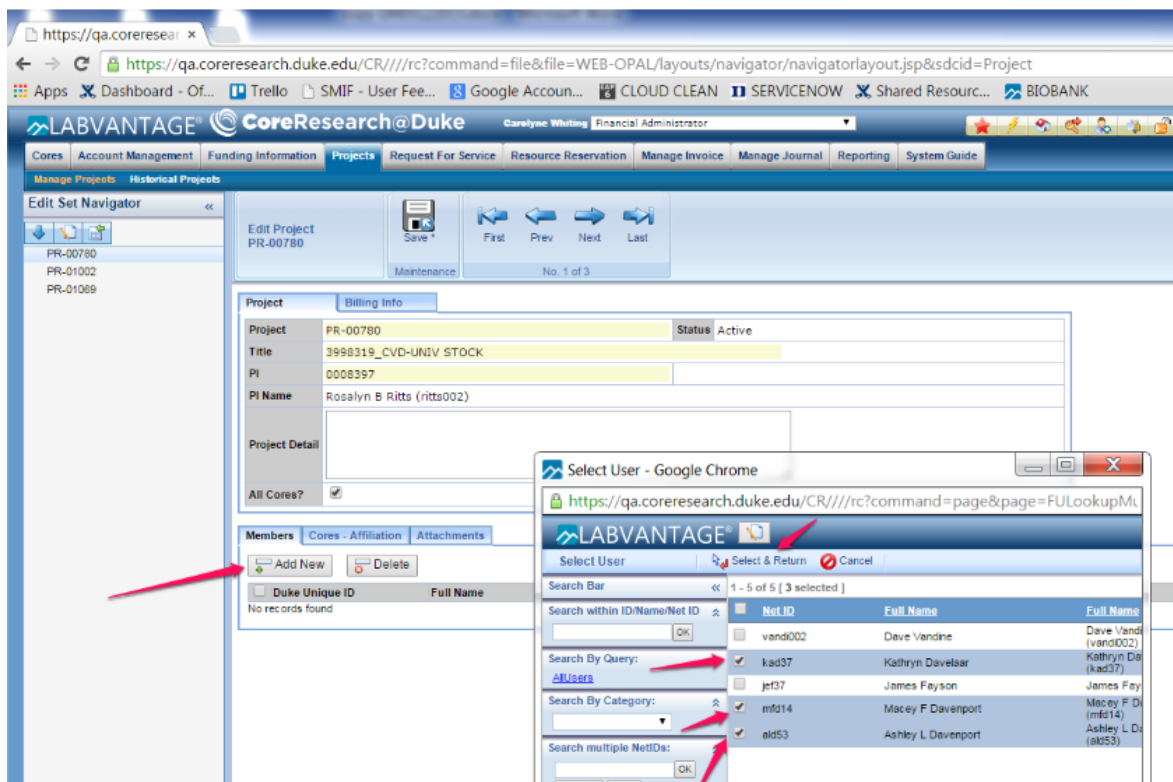
The Facility User has been linked to the Principal Investigator (PI).

## 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.



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.



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.