Overview
This quick reference card (QRC) for MasterControl summarizes how users in the Leader role can modify a step in a route to make changes to its membership.

Adding a User or Role
As a Leader, you can add or remove MasterControl users in a step in a route.

You have the option of adding by individual users or by role. If you have a group of people to enter, then adding them by role takes less time. But, be aware that this option adds all the users in that role.

1. In MasterControl, go to one of the following locations:
   - In My Tasks or Tracking, find the route you want to modify.
   - In Task Collaboration, go to the Members section at the bottom.

2. Click the Modify Step icon ( ).
   The Modify Step window appears.

3. In the Step drop-down list, ensure the correct step in the route appears.

4. In the Available field, select a user or role.
   Tip: To select more than one, hold down Ctrl as you click multiple choices.
   a. In the Quickfind box, enter the person’s first name, last name, or a portion of either.
      The contents in the scrollable box changes as you enter characters.
   b. In the scrollable box, click the name of the person/role you want.

5. Click the add arrow ( ) to the left of Collaborators, Leaders, or Add Only, as necessary.
   The person or role appears in the appropriate box.
   Note: A person can appear in only one box.

6. Return to steps 4 and 5 to add other users/roles as necessary.
   Note: to return the screen back to the way it was when you first viewed it, click Undo Changes.

7. Click Save.
   A green wink appears, confirming you successfully modified this step. Also, MasterControl replaces each role name with the names of individual users in each role.

8. To close the window, click ✗.
   Note: Providing Guest connections are not supported at this time.

Removing a User
1. In My Tasks or Tracking, find the route you want to modify.

2. Click the route’s Modify Step icon ( ).
   The Modify Step window appears.

3. In the Step drop-down list, ensure the correct step in the route appears.

4. In the Collaborators, Leaders, or Add Only box, click a person you want to remove.
   Tip: To select more than one, hold down Ctrl as you click multiple choices.

5. To the left of the box, click the remove arrow ( ).
   The person’s name disappears.

6. Return to steps 4 and 5 to remove other users as necessary.

7. Click Save.
   A green wink appears, confirming you successfully modified this step.

8. To close the window, click ✗.

Getting Help
If you experience any technical problems working with MasterControl that you are unable to resolve, email the DCRI Service Desk at dcriservicedesk@dm.duke.edu.