

eGrants

learning series

agency user management

SET-UP GUIDE FOR AGENCY USER ADMINISTRATORS

Creating new user accounts

Managing user account information

Managing privileges and roles

Locking and removing users

Contents

Contents	i
Introduction	1
About Agency Users.....	1
Roles and Security	2
Electronic Signatures	2
Creating New Agency Users	3
Create Agency User ❖ Before You Start.....	3
Create Agency User ❖ Step-by-Step	4
Editing User Information	9
Edit Agency User ❖ Step-by-Step	9
Resetting User Passwords	12
Reset Agency User Password ❖ Step-by-Step.....	12
Locking or Removing Agency User Accounts	15
Lock Agency User Account ❖ Step-by-Step	16
Unlock Agency User Account ❖ Step-by-Step.....	18
Delete Agency User Account ❖ Step-by-Step	20
Renewing User Roles	21
Renew User Roles ❖ Step-by-Step.....	22

Introduction

Welcome to the **eGrants**, Pennsylvania Department of Education’s online system for submitting and managing grant applications.

eGrants is available to all participating Agencies eligible to apply for and receive educational grants, including school districts, charter schools, intermediate units, libraries and other institutions.

Each participating Agency must assign an Agency User Administrator to create and manage **eGrants** accounts for all employees and associates who access the system.

The authorized Agency User Administrator must be verified by one of the PDE Program Offices to receive a valid account login ID, password and instructions.

This manual provides specific instructions for Agency User Administrators responsible for creating new Agency users and managing their accounts.

IMPORTANT LEARNING RESOURCES: All users are encouraged to review the “Getting Started” module of the **eGrants Learning Series** before logging into the system.

About Agency Users

eGrants is a secured Internet system. To protect user privacy, information about each Agency is secured. When you create a user account for your Agency, only information for your specific Agency is available.

Agency users are managed by the Agency User Administrator. Their access to system information and options is restricted based on their user type (Agency User) and by security roles assigned by the User Administrator.

Federal and state educational grants are managed by individual PDE Program Offices. Each Agency user can access information for one or more assigned PDE Program Offices to view available grant information and apply for grants.

To view available grants, the Agency must contact the Program Office Administrator to request access. There is no limit to the number of Program Offices an Agency can access; however, each Program Office Bureau must approve access for the Agency.

Authorized Program Office User Administrators oversee the Agency user population. They are responsible for creating Agency User Administrator accounts and assisting with user issues, when needed.

Roles and Security

The Agency User Administrator is responsible for securing **eGrants** information and access to the tasks agency users can perform.

When the Agency User Administrator creates new user accounts, a selection of security roles is available for assignment. These roles control the information the new user can view, the tasks that can be performed and the approvals that can be applied.

Roles are specified individually for each Program Office. If your Agency users have access to more than one Program Office, privileges must be assigned individually for each Program Office.

The operations needed to create users and apply roles are quite simple. Follow this guide for step-by-step instructions on all user management tasks.

Electronic Signatures

eGrants uses online electronic signatures to record approvals on submitted projects.

Like a signature on a paper document, the electronic signature is a legally binding authorization that validates the user's acceptance and approval of contracts, terms and conditions.

Generally, only managerial personnel in an Agency, such as a superintendent or director, have the authority to sign and submit legal documents.

Electronic signatures are secured and verified by the user's unique login ID and password. A special "electronic signature" role controls the ability to sign documents electronically.

The ability to use an electronic signature must be assigned by the Pennsylvania Department of Education's Office of Chief Counsel. Users must submit a legal agreement that verifies they have authority to submit legal documents on behalf of the Agency. After review and approval, an authorized PDE representative assigns the electronic signature role in **eGrants**.

Agency User Administrators are responsible for creating the user accounts for the Agency's managerial staff and assigning other roles the manager may perform, such as "authorized signoff" and "project submit." However, the User Administrator does not have the authority to assign the "electronic signature" role.

For information on obtaining the authority to apply electronic signatures for Agency personnel, contact the Program Office or the **eGrants** help desk.

Creating New Agency Users

Agency User Administrators can create new accounts for Agency personnel.

To create a user account, assign a unique login ID, enter basic information and select roles to provide privileges to view and manage different types of Agency information.

After the account is created, the new user can login to **eGrants** immediately. The user can view information only for the current Agency and its available Program Offices. If the user requires access to other Program Office or Agency information to perform peer reviews or other functions, contact your Program Office User Administrator.

Note that Program Office User Administrators and **eGrants** system administrators also can create new Agency users, upon request.

AUTOMATIC PASSWORD GENERATION: When you create a new user account, **eGrants** automatically assigns a starter password and generates an email message to your new user. When the user logs into the system for the first time, he or she must change the password.

Create Agency User ❖ Before You Start

Only Agency User Administrators can create new users for an Agency.

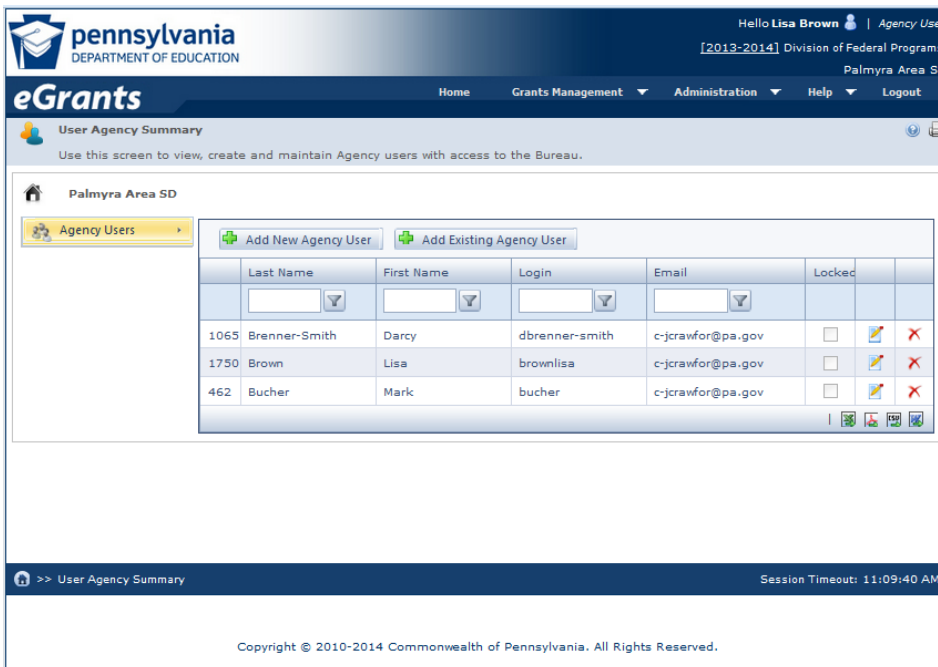
Before creating a new Agency user:

1. Verify basic information about the user:
 - First and last name, middle initial and preferred title
 - Job title
 - Email address
 - Telephone and extension
2. Verify that the user does not have an existing **eGrants** account.
3. Identify the Program Office for which you are adding (or editing) the Agency user. You must select the appropriate Program Office before creating a new user or changing role assignments.
4. Identify all the roles the user will perform for the Agency and for the current Program Office. Refer to “Managing Roles and Security” for more information.
5. Ask if the new user has a preferred login. (If no login ID is preferred, a login containing the user’s last name is recommended.)

Create Agency User ❖ Step-by-Step

To create a new Agency user:

1. Login to **eGrants** as an Agency User Administrator.
2. Select the appropriate program office.
3. From the main menu bar, click **Administration > User Management**. The **User Agency Summary** screen appears.



Use this screen to view, create and maintain Agency users with access to the Bureau.

Palmyra Area SD

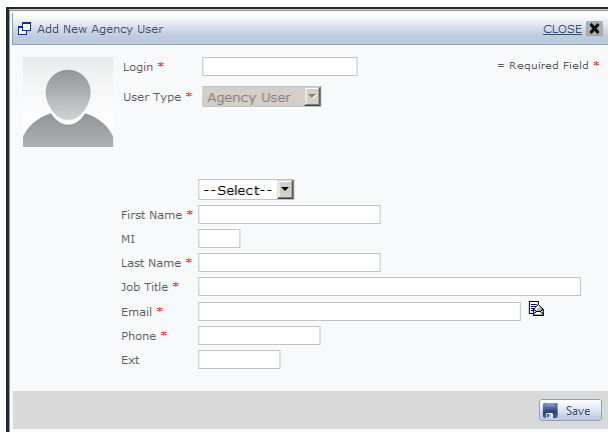
Agency Users

	Last Name	First Name	Login	Email	Locked		
1065	Brenner-Smith	Darcy	dbrenner-smith	c-jcrawfor@pa.gov	<input type="checkbox"/>		
1750	Brown	Lisa	brownlisa	c-jcrawfor@pa.gov	<input type="checkbox"/>		
462	Bucher	Mark	bucher	c-jcrawfor@pa.gov	<input type="checkbox"/>		

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A list of all available users for your Agency appears. Note that there are two buttons: **Add New Agency User** and **Add Existing Agency User**. The steps are the same for both.

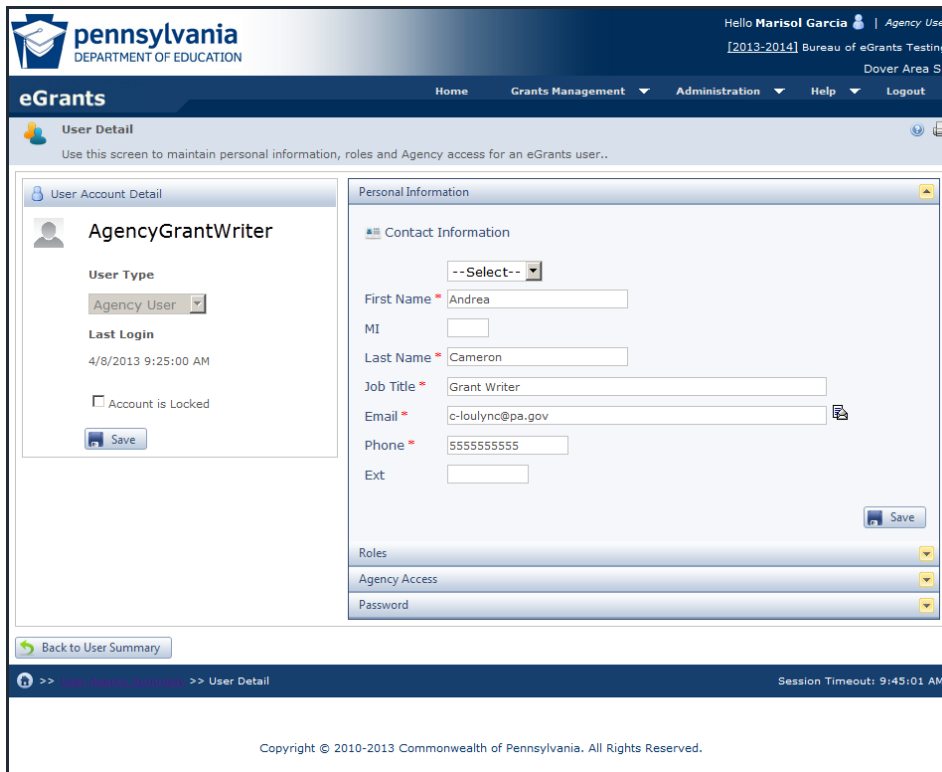
4. Click the **Add New Agency User** button above the list. The **Add New Agency User** window appears.



5. Complete the fields:

Login	Text / Required	Type a unique user login for the new user. To verify if the login is available, press TAB . The system indicates if the login is available. If the login is not available, enter a new login.
User Type	Restricted	Only Agency User Administrators can be created on this screen.
Title of Address	Dropdown / Optional	Click the dropdown list. Click the title of address.
First Name	Text / Required	Type the user's first name. Compound and hyphenated names are acceptable.
Middle Initial	Text / Optional	Type the user's middle initial.
Last Name	Text / Required	Type the user's last name. Compound and hyphenated names are acceptable.
Job Title	Text / Required	Type the user's job title. This title is retrieved when the user enters Contact Information or Electronic Signature information.
Email	Text / Required	Type a valid email address for the user. An email is required for eGrants user authorization and various notifications. The same email address can be used for multiple user accounts (such as a shared department address). A system message appears if the email is used for other user accounts.
Phone	Text / Required	Type the area code and telephone number for the user.
Ext	Text / Optional	Type the user's extension, if required.

6. Click **Save** to save the information and close the window. The **User Detail** screen appears.



pennsylvania
DEPARTMENT OF EDUCATION

Hello Marisol Garcia | Agency User
[2013-2014] Bureau of eGrants Testing
Dover Area SD

eGrants Home Grants Management Administration Help Logout

User Detail
Use this screen to maintain personal information, roles and Agency access for an eGrants user..

User Account Detail

AgencyGrantWriter

User Type
Agency User

Last Login
4/8/2013 9:25:00 AM

Account is Locked

Save

Personal Information

Contact Information

-- Select --

First Name * Andrea

MI

Last Name * Cameron

Job Title * Grant Writer

Email * c-loulync@pa.gov

Phone * 5555555555

Ext

Save

Roles

Agency Access

Password

[Back to User Summary](#)

Session Timeout: 9:45:01 AM

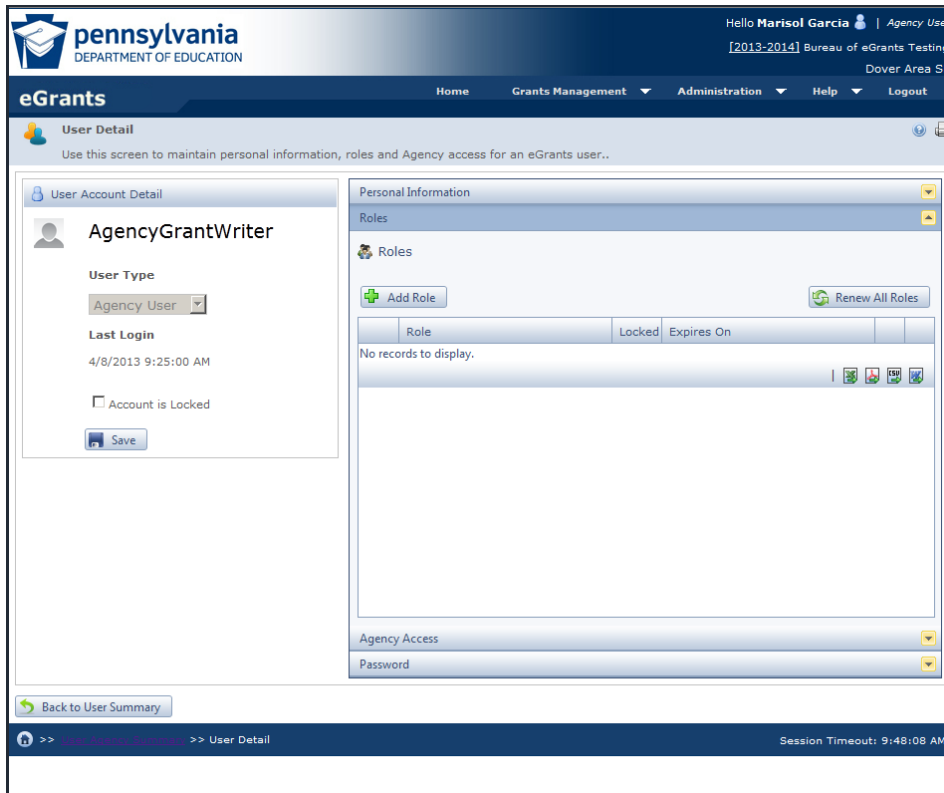
Copyright © 2010-2013 Commonwealth of Pennsylvania. All Rights Reserved.

The information you entered for the new users appears in the fields.

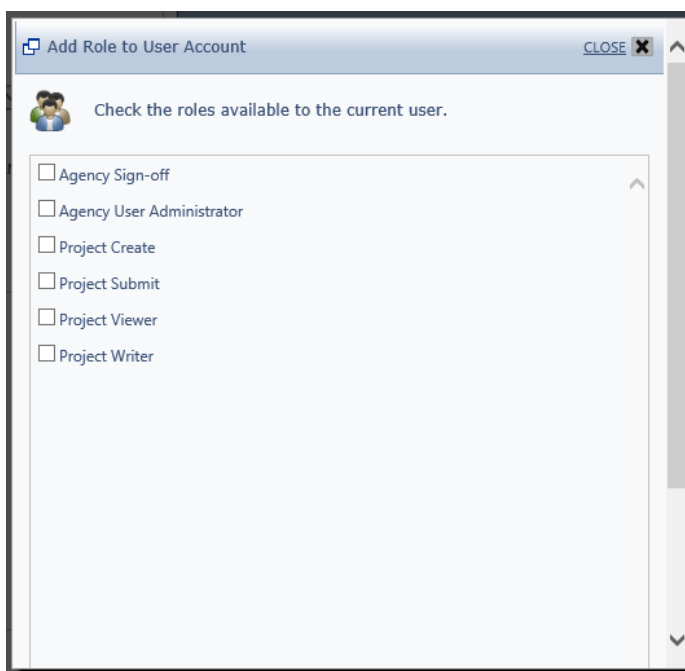
- To add an existing agency user from another Program Office, click the **Add Existing Agency User** button, and follow the steps for adding a new agency user.

If needed, edit the **Personal Information** fields and click **Save** to modify the information.

- Before the user can access eGrants information, at least one role must be assigned. Click the **Roles** panel bar to expand the panel.



- Click **Add Role**. The **Add Role to User Account** window appears.



10. Check the box or boxes to assign one or more roles for access rights or task assignment. Roles can be combined as needed to enable the user to perform a combination of tasks for your Agency.

Agency Sign-off	Task Assignment	Click the checkbox if the user is an authorized approver of projects. This role enables the user to perform the authorized signoff task during project submission.
Agency User Administrator	Security Access	The User Administrator role provides access to the Administration menu and enables the user to create and manage user accounts.
Project Create	Task Assignment	The Project Create role enables the user to view and select available grant programs and create a new project on behalf of the Agency. It activates the Create New Project button on user screens.
Project Writer	Security Access	The Project Writer role enables the user to enter and edit an answer text on a project and modify project details.
Project Viewer	Security Access	Project Viewers have the capability to view all project information in read-only format. The role can be combined with agency signoff and others.
Project Submit	Task Assignment	The Project Submit role activates the Submit button and enables the user to complete and submit a grant application to the Program Office.
Electronic Signature	Task Assignment	The role activates the Electronic Signature functions used for applying an authorized electronic signature to a contract. It can be assigned only upon approval by an authorized PDE representative.

11. After assigning one or more roles, click **Select**. The **Add Role to User Account** window closes. All assigned roles appear in the selection list.
12. Click **Back to User Summary** to add additional users or perform other user management tasks.

After roles are added, the user account is ready for login and use.


The new user receives an email with login instructions and a temporary password from RA-eGrantsHelp@pa.gov. The email usually arrives within one minute. If you do not receive an email, check your spam/junk folder.

NOTE: The roles you assign are valid only for the current Program Office. If your Agency has access to more than one Program Office, you must change the Program Office and assign new roles.

❖ **END OF INSTRUCTIONS: “CREATE AGENCY USER”**

Editing User Information

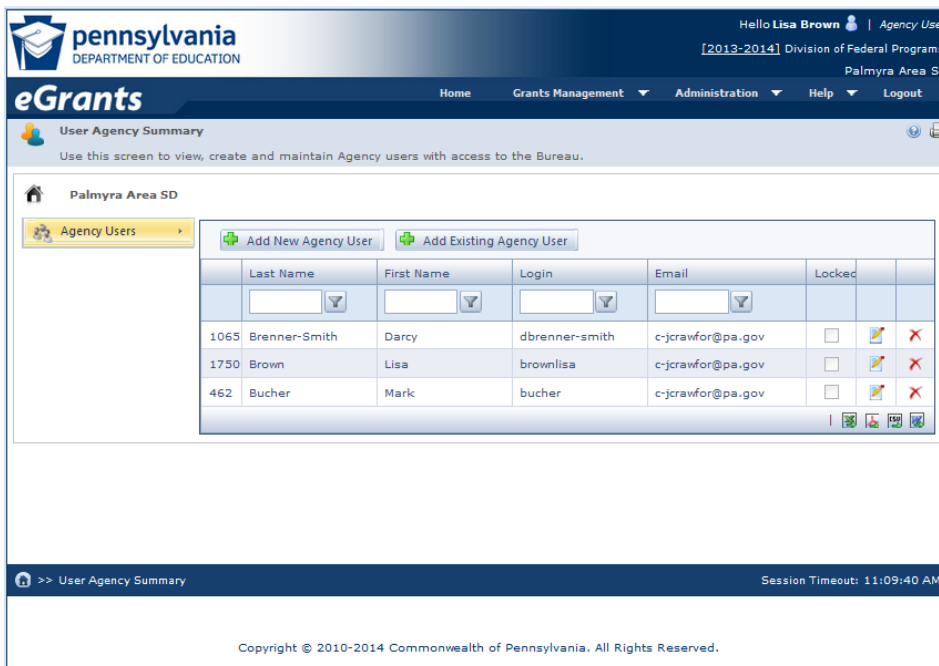
Agency User Administrators can edit information assigned to an Agency user, when required.

USER PROFILE MAINTENANCE: Users with active access to eGrants can maintain their own Personal Information (name, address, etc.) by clicking the **Profile** icon  in the upper left corner of every screen.

Edit Agency User ❖ Step-by-Step


To edit information for an existing Agency user:


1. Login to eGrants as an Agency User Administrator.
2. If you have access to more than one **Program Office**, the **Select Program Office** window appears. Click **SELECT** beside the appropriate Program Office.
3. From the main menu bar, click **Administration > User Management**. The **User Agency Summary** screen appears.

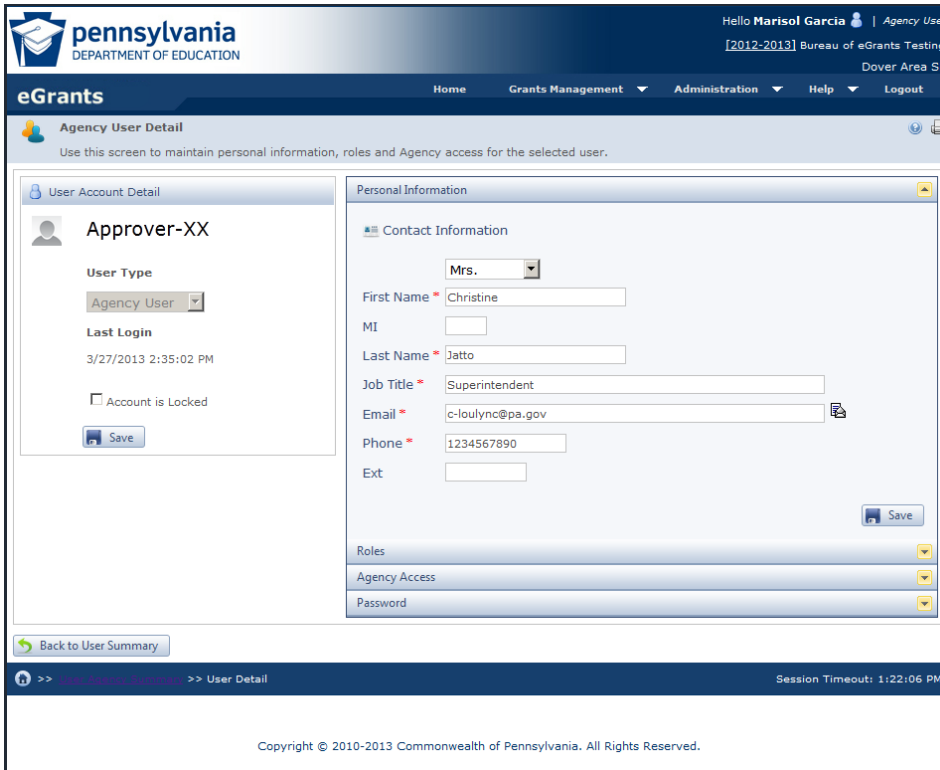


The screenshot shows the 'User Agency Summary' screen in the eGrants system. The page header includes the Pennsylvania Department of Education logo and the user's name 'Hello Lisa Brown | Agency User'. The main menu bar contains 'Home', 'Grants Management', 'Administration', 'Help', and 'Logout'. The 'User Agency Summary' section includes a sub-header 'Palmyra Area SD' and a table of agency users. The table has columns for 'Last Name', 'First Name', 'Login', 'Email', and 'Locked'. There are also buttons for 'Add New Agency User' and 'Add Existing Agency User'.

	Last Name	First Name	Login	Email	Locked		
1065	Brenner-Smith	Darcy	dbrenner-smith	c-jcrawfor@pa.gov	<input type="checkbox"/>		
1750	Brown	Lisa	brownlisa	c-jcrawfor@pa.gov	<input type="checkbox"/>		
462	Bucher	Mark	bucher	c-jcrawfor@pa.gov	<input type="checkbox"/>		

4. A list of all available users for your Agency appears. Locate the user to edit:
 - Click the column heading in the selection list to sort a column in alphabetical order.
 - Type all or part of the information (case-sensitive) you wish to locate in one or more fields below the column heading and click the filter icon .

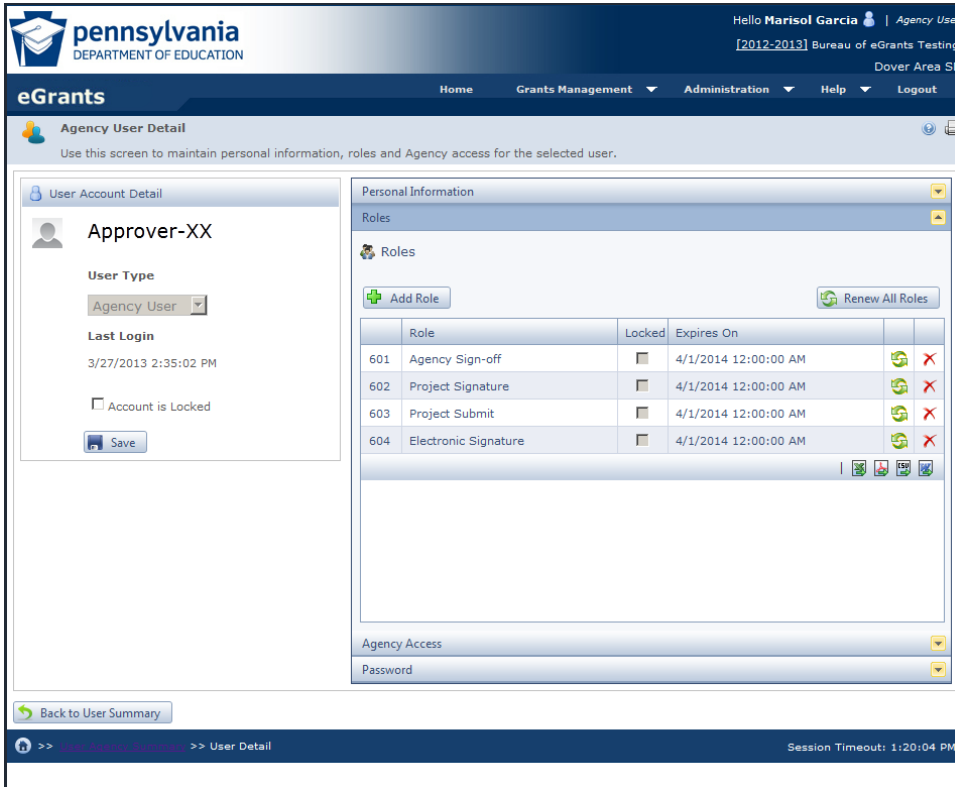
- Click the **Select** icon  in the row of the user to edit. The **Agency User Detail** screen appears.



The screenshot shows the 'Agency User Detail' screen for a user named 'Approver-XX'. The interface includes a navigation menu at the top with options like 'Home', 'Grants Management', 'Administration', 'Help', and 'Logout'. The main content area is divided into two sections: 'User Account Detail' on the left and 'Personal Information' on the right. The 'User Account Detail' section shows the user type as 'Agency User' and the last login time as '3/27/2013 2:35:02 PM'. The 'Personal Information' section contains a 'Contact Information' form with fields for 'First Name' (Christine), 'Last Name' (Jatto), 'Job Title' (Superintendent), 'Email' (c-loulync@pa.gov), and 'Phone' (1234567890). There are 'Save' buttons at the bottom of both sections. A 'Back to User Summary' link is located at the bottom left of the main content area. The footer of the page includes the copyright notice: 'Copyright © 2010-2013 Commonwealth of Pennsylvania. All Rights Reserved.'

- Click and edit any of the fields. Note that you cannot edit the login ID for any user.
- Click **Save** to save the information.

8. To add new roles or remove roles for the current Program Office, click the **Roles** panel bar to expand the panel.



Agency User Detail

Use this screen to maintain personal information, roles and Agency access for the selected user.

User Account Detail

Approver-XX

User Type
Agency User

Last Login
3/27/2013 2:35:02 PM

Account is Locked

Personal Information


Roles

Role	Locked	Expires On
601 Agency Sign-off	<input type="checkbox"/>	4/1/2014 12:00:00 AM
602 Project Signature	<input type="checkbox"/>	4/1/2014 12:00:00 AM
603 Project Submit	<input type="checkbox"/>	4/1/2014 12:00:00 AM
604 Electronic Signature	<input type="checkbox"/>	4/1/2014 12:00:00 AM

Agency Access

Password

Session Timeout: 1:20:04 PM

9. Add or remove roles as needed:
 - **Add Role**
Click the **Add Role** button to open the **Add Role to User Account** window. Check the box or boxes for new roles to add and click **Select**.
 - **Remove Role**
To remove a role from the selection list, click its **Delete** icon .

Roles are saved automatically when you complete the **Add** window or edit the selection grid.

10. Click **Back to User Summary** to edit other users or perform other user management tasks.

❖ **END OF INSTRUCTIONS: “EDIT AGENCY USER”**

Resetting User Passwords

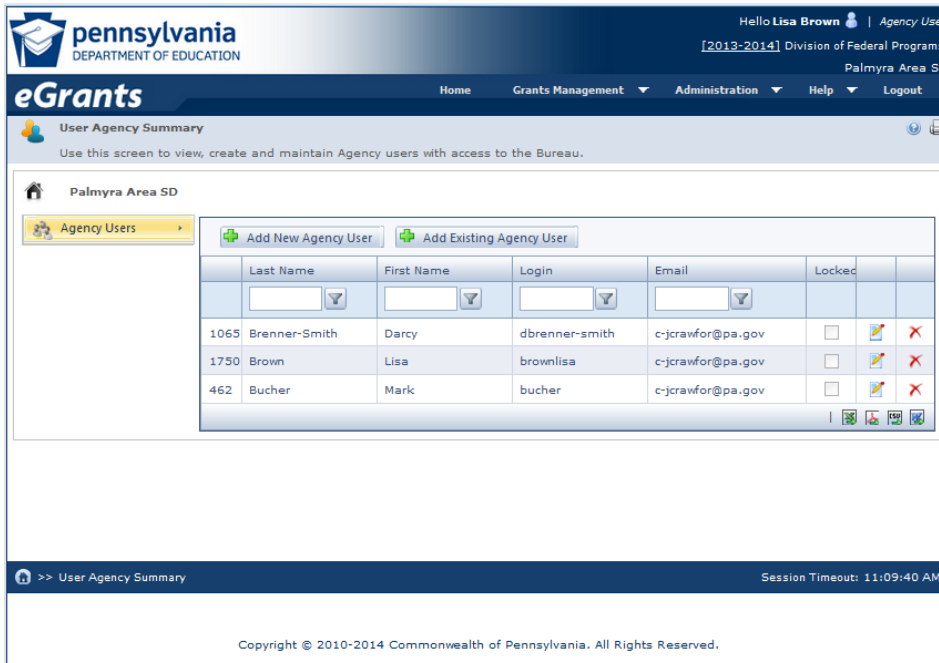
If needed, Agency User Administrators can reset a user's password.

FORGOTTEN PASSWORD OPTION: Users can generate a new password on their own. If a user forgets a password, he or she can simply click the **Forgot Password** option on the **eGrants** login screen. The system resets the password and emails instructions with a new temporary password.

Reset Agency User Password ❖ Step-by-Step

To reset a password for an existing Agency user:


1. Login to **eGrants** as an Agency User Administrator.
2. If you have access to more than one **Program Office**, the **Select Program Office** window appears. Click **SELECT** beside the appropriate Program Office.
3. From the main menu bar, click **Administration > User Management**. The **User Agency Summary** screen appears.




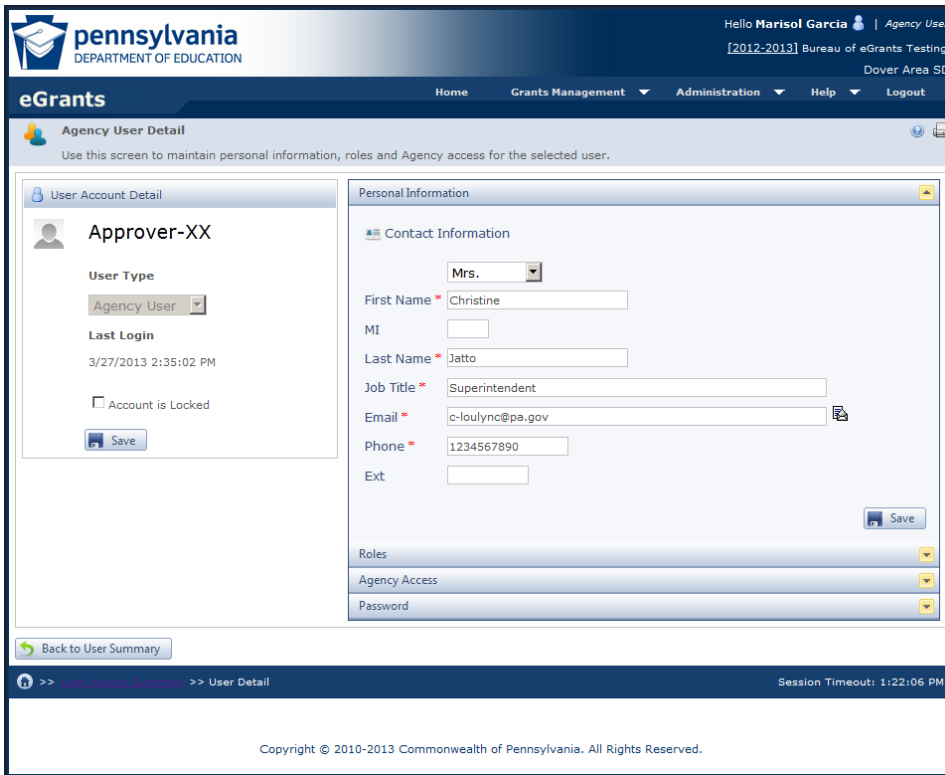
The screenshot shows the 'User Agency Summary' screen for 'Palmyra Area SD'. The page title is 'User Agency Summary' and the subtitle is 'Use this screen to view, create and maintain Agency users with access to the Bureau.' The main content area has a 'Palmyra Area SD' header and a 'Agency Users' dropdown menu. Below the menu are two buttons: 'Add New Agency User' and 'Add Existing Agency User'. A table lists the following users:

	Last Name	First Name	Login	Email	Locked		
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		
1065	Brenner-Smith	Darcy	dbrenner-smith	c-jcrawfor@pa.gov	<input type="checkbox"/>		
1750	Brown	Lisa	brownlisa	c-jcrawfor@pa.gov	<input type="checkbox"/>		
462	Bucher	Mark	bucher	c-jcrawfor@pa.gov	<input type="checkbox"/>		

At the bottom of the screen, there is a footer: 'Copyright © 2010-2014 Commonwealth of Pennsylvania. All Rights Reserved.' and a session timeout notice: 'Session Timeout: 11:09:40 AM'.

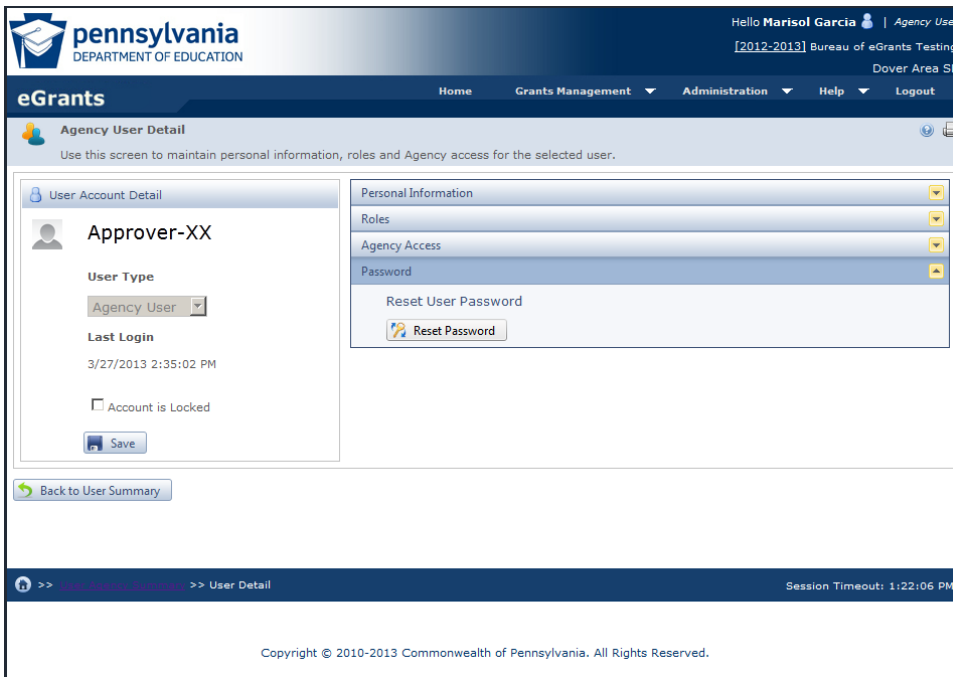
4. A list of all available users for your Agency appears. Locate the user to edit:
 - Click the column heading in the selection list to sort a column in alphabetical order.
 - Type all or part of the information (case-sensitive) you wish to locate in one or more fields below the column heading and click the filter icon .

- Click the **Select** icon  in the row of the user to edit. The **Agency User Detail** screen appears.



The screenshot shows the 'Agency User Detail' screen for a user named 'Approver-XX'. The user type is 'Agency User' and the last login was on 3/27/2013 at 2:35:02 PM. The account is not locked. The 'Personal Information' section is expanded, showing contact information: Mrs. Christine Jatto, Superintendent, with email c-louync@pa.gov and phone 1234567890. There are 'Save' buttons for both the personal information and the user account detail sections. A 'Back to User Summary' button is at the bottom left. The footer shows 'Copyright © 2010-2013 Commonwealth of Pennsylvania. All Rights Reserved.' and a session timeout of 1:22:06 PM.

- Click the **Password** panel bar to expand the panel.



This screenshot is similar to the previous one, but the 'Password' panel bar is expanded. The 'Personal Information' panel is now collapsed. The expanded 'Password' panel shows a 'Reset User Password' section with a 'Reset Password' button. The rest of the interface, including the user account details and navigation elements, remains the same.

- Click the **Reset Password** button. The system resets the password and sends an email to the user with instructions for using the temporary password.

8. Click **Back to User Summary** to perform other user management tasks.

❖ **END OF INSTRUCTIONS: “RESET AGENCY USER PASSWORD”**

Locking or Removing Agency User Accounts

For security purposes, Agency User Administrators can lock or remove an Agency user's account.

After an account is locked or removed, the user cannot access **eGrants**.

- **Locked Accounts**

Accounts can be locked temporarily to prevent a user from accessing **eGrants** information. Use the option to suspend privileges for a specified period, such as an employee's leave of absence. A locked account can be reactivated at any time.

- **Deleted Accounts**

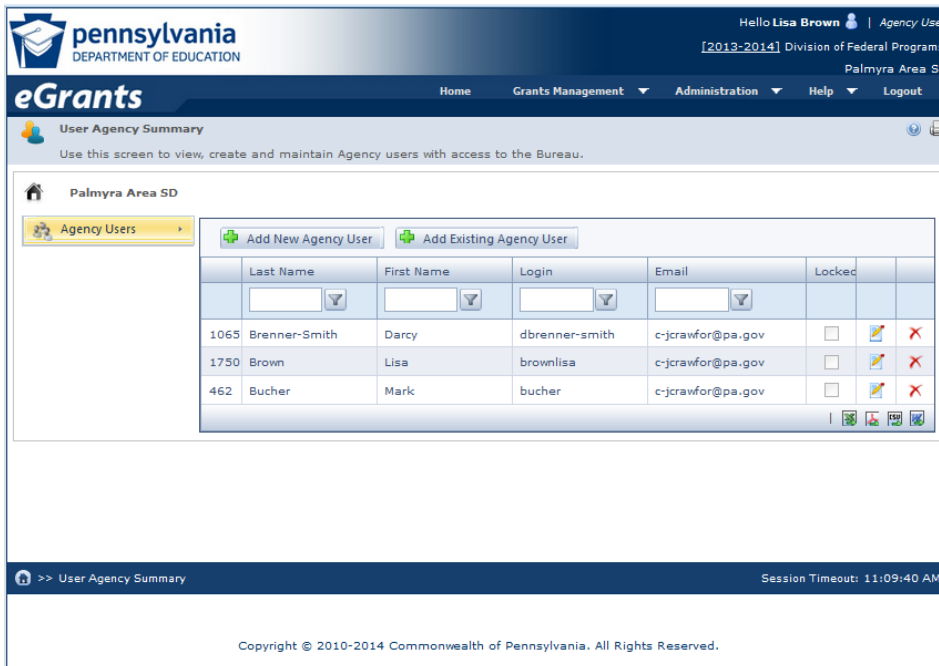
After an account is deleted, the login ID is prevented from accessing **eGrants** permanently. The account cannot be reactivated and the login ID cannot be reused. Delete accounts only if an Agency user is no longer employed. If a deleted user wishes to open an account in the future, a new login ID is required.

LOGIN ID REUSE RESTRICTION: Login IDs in **eGrants** are linked to specific user tasks, such as data entry, approvals, review comments and authorized signoffs. In order to maintain the integrity of system records, login IDs must be unique and cannot be reused. To prevent potential duplication of login IDs that represent user activities, deleted logins are maintained in a secured system archive.

Lock Agency User Account ❖ Step-by-Step


To lock an Agency user account temporarily and prevent access to **eGrants**:


1. Login to **eGrants** as an Agency User Administrator.
2. If you have access to more than one **Program Office**, the **Select Program Office** window appears. Click **SELECT** beside the appropriate Program Office.
3. From the main menu bar, click **Administration > User Management**. The **User Agency Summary** screen appears.

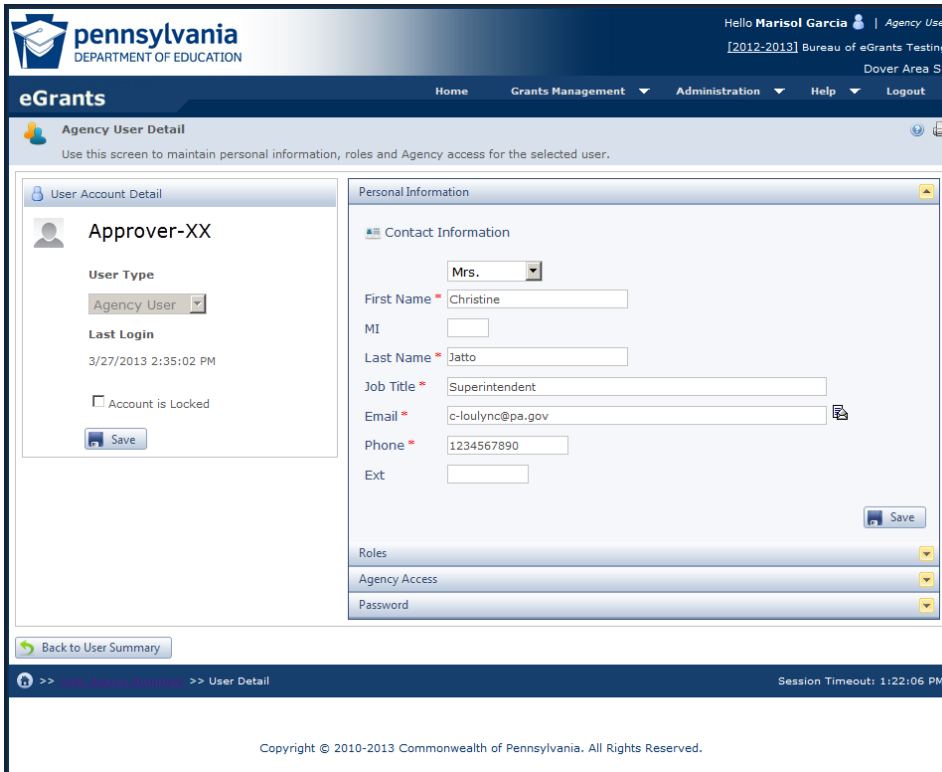


The screenshot shows the 'User Agency Summary' page for 'Palmyra Area SD'. It features a table of agency users with the following data:

	Last Name	First Name	Login	Email	Locked		
1065	Brenner-Smith	Darcy	dbrenner-smith	c-jcrawfor@pa.gov	<input type="checkbox"/>		
1750	Brown	Lisa	brownlisa	c-jcrawfor@pa.gov	<input type="checkbox"/>		
462	Bucher	Mark	bucher	c-jcrawfor@pa.gov	<input type="checkbox"/>		

4. A list of all available users for your Agency appears. Locate the user to edit:
 - Click the column heading in the selection list to sort a column in alphabetical order.
 - Type all or part of the information (case-sensitive) you wish to locate in one or more fields below the column heading and click the filter icon .

- Click the **Select** icon  in the row of the user to edit. The **Agency User Detail** screen appears.



The screenshot displays the 'Agency User Detail' interface. On the left, the 'User Account Detail' pane shows the user 'Approver-XX' with a 'User Type' of 'Agency User' and a 'Last Login' of '3/27/2013 2:35:02 PM'. An 'Account is Locked' checkbox is present, and a 'Save' button is at the bottom. The main 'Personal Information' pane includes a 'Contact Information' section with fields for 'Mrs.' (title), 'Christine' (first name), 'Jatto' (last name), 'Superintendent' (job title), 'c-loulync@pa.gov' (email), and '1234567890' (phone). A 'Save' button is located at the bottom right of this section. Below the main form are sections for 'Roles', 'Agency Access', and 'Password'. A 'Back to User Summary' button is at the bottom left. The footer shows 'Copyright © 2010-2013 Commonwealth of Pennsylvania. All Rights Reserved.' and a 'Session Timeout: 1:22:06 PM' indicator.

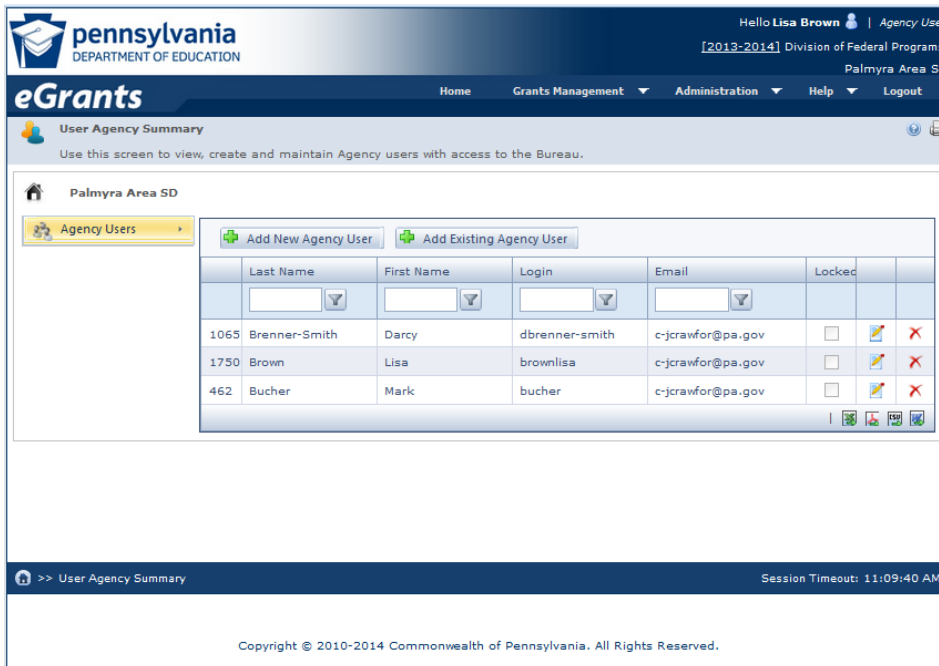
- Click the **Account is Locked** checkbox in **User Account Detail** pane on the left side of the screen.
- Click **Save** to lock the account.
- Click **Back to User Summary** to edit other users or perform other user management tasks.

❖ **END OF INSTRUCTIONS: "LOCK USER ACCOUNT"**

Unlock Agency User Account ❖ Step-by-Step

To unlock an Agency user account and restore access to **eGrants**:

1. Login to **eGrants** as an Agency User Administrator.
2. If you have access to more than one **Program Office**, the **Select Program Office** window appears. Click **SELECT** beside the appropriate Program Office.
3. From the main menu bar, click **Administration > User Management**. The **User Agency Summary** screen appears.



Use this screen to view, create and maintain Agency users with access to the Bureau.

Palmyra Area SD


Agency Users

Add New Agency User Add Existing Agency User

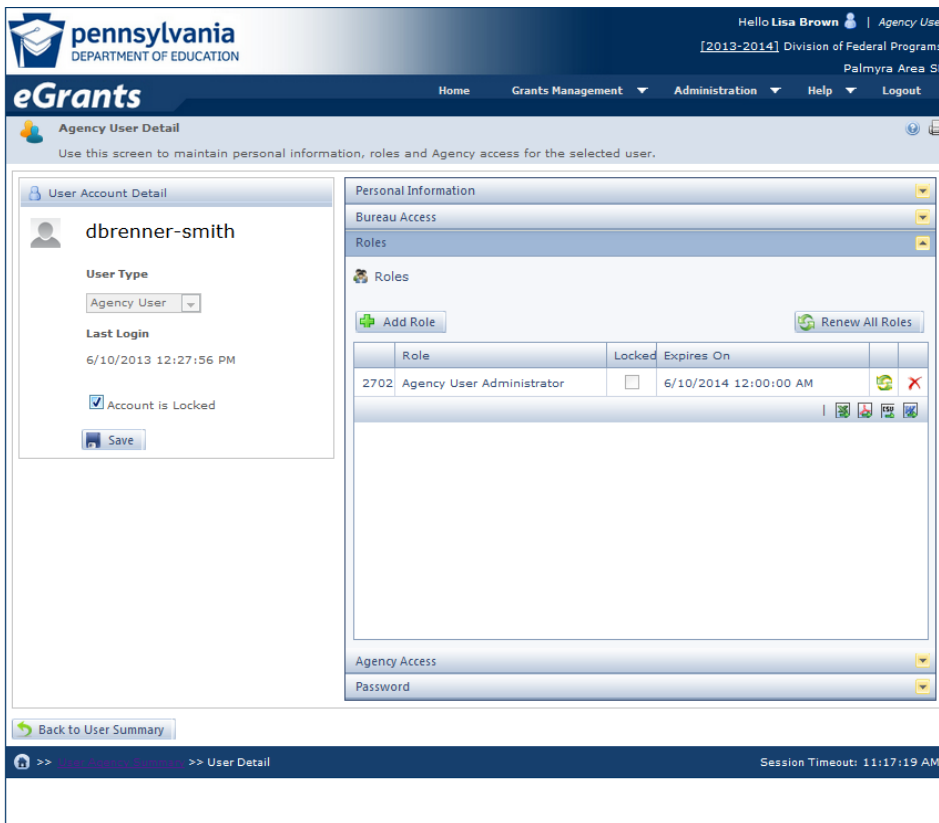
	Last Name	First Name	Login	Email	Locked		
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		
1065	Brenner-Smith	Darcy	dbrenner-smith	c-jcrawfor@pa.gov	<input type="checkbox"/>		
1750	Brown	Lisa	brownlisa	c-jcrawfor@pa.gov	<input type="checkbox"/>		
462	Bucher	Mark	bucher	c-jcrawfor@pa.gov	<input type="checkbox"/>		

Session Timeout: 11:09:40 AM

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4. A list of all available users for your Agency appears. Locate the user to edit:
 - Click the column heading in the selection list to sort a column in alphabetical order.
 - Type all or part of the information (case-sensitive) you wish to locate in one or more fields below the column heading and click the filter icon .

5. Click the **Select** icon  in the row of the user to edit. The **Agency User Detail** screen appears.



Agency User Detail
Use this screen to maintain personal information, roles and Agency access for the selected user.

User Account Detail
dbrenner-smith

User Type
Agency User

Last Login
6/10/2013 12:27:56 PM

Account is Locked

Save

Personal Information
Bureau Access
Roles

Roles

Add Role **Renew All Roles**

Role	Locked	Expires On
2702: Agency User Administrator	<input type="checkbox"/>	6/10/2014 12:00:00 AM

Agency Access
Password

Back to User Summary

Session Timeout: 11:17:19 AM

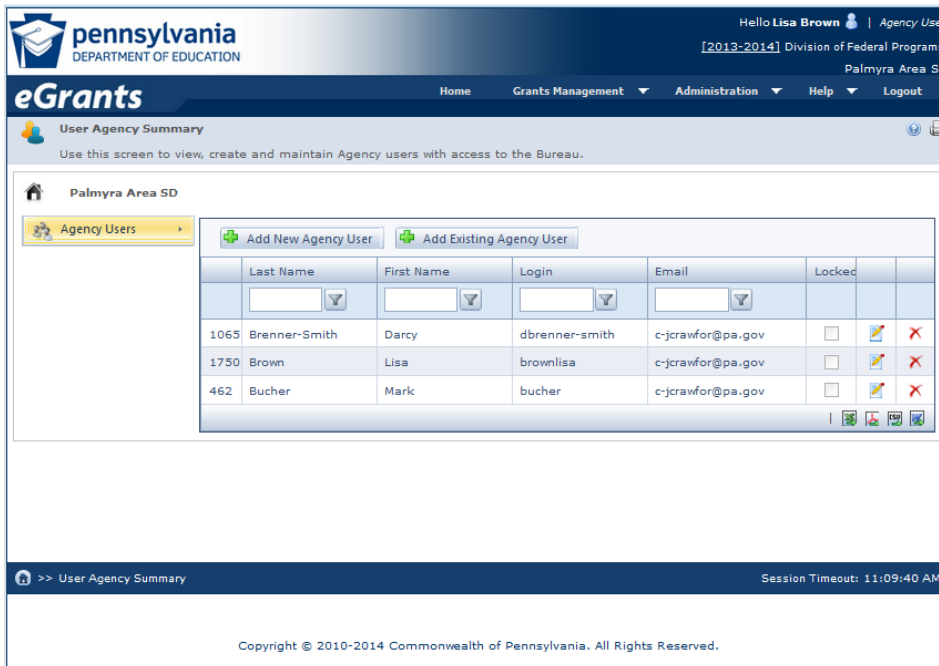
6. Click to remove the check from the **Account is Locked** checkbox in **User Account Detail** pane (left side of the screen).
7. Click **Save** to unlock the account.
8. Click **Back to User Summary** to edit other users or perform other user management tasks.

❖ **END OF INSTRUCTIONS: "UNLOCK USER ACCOUNT"**

Delete Agency User Account ❖ Step-by-Step

To remove an Agency user account and login ID permanently:

1. Login to **eGrants** as an Agency User Administrator.
2. If you have access to more than one **Program Office**, the **Select Program Office** window appears. Click **SELECT** beside the appropriate Program Office.
3. From the main menu bar, click **Administration > User Management**. The **User Agency Summary** screen appears.



Use this screen to view, create and maintain Agency users with access to the Bureau.

Palmyra Area SD


Agency Users

Add New Agency User Add Existing Agency User

	Last Name	First Name	Login	Email	Locked		
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		
1065	Brenner-Smith	Darcy	dbrenner-smith	c-jcrawfor@pa.gov	<input type="checkbox"/>		
1750	Brown	Lisa	brownlisa	c-jcrawfor@pa.gov	<input type="checkbox"/>		
462	Bucher	Mark	bucher	c-jcrawfor@pa.gov	<input type="checkbox"/>		

>> User Agency Summary Session Timeout: 11:09:40 AM

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4. To delete a user, click the **Delete** icon  in the row beside the user name. The system prompts you for verification before deleting the user.
5. Click **OK** to remove the user and login ID permanently.

❖ **END OF INSTRUCTIONS: “DELETE USER ACCOUNT”**

Renewing User Roles

In accordance with Pennsylvania Department of Education's computer security policies, user access to the **eGrants** systems must be reviewed on an annual basis.

eGrants automatically assigns an expiration date of one year to each role. Agency User Administrators are responsible for reviewing and renewing the roles for all Agency users.

Agency User Administrators are advised to review their Agency users each year to ensure:

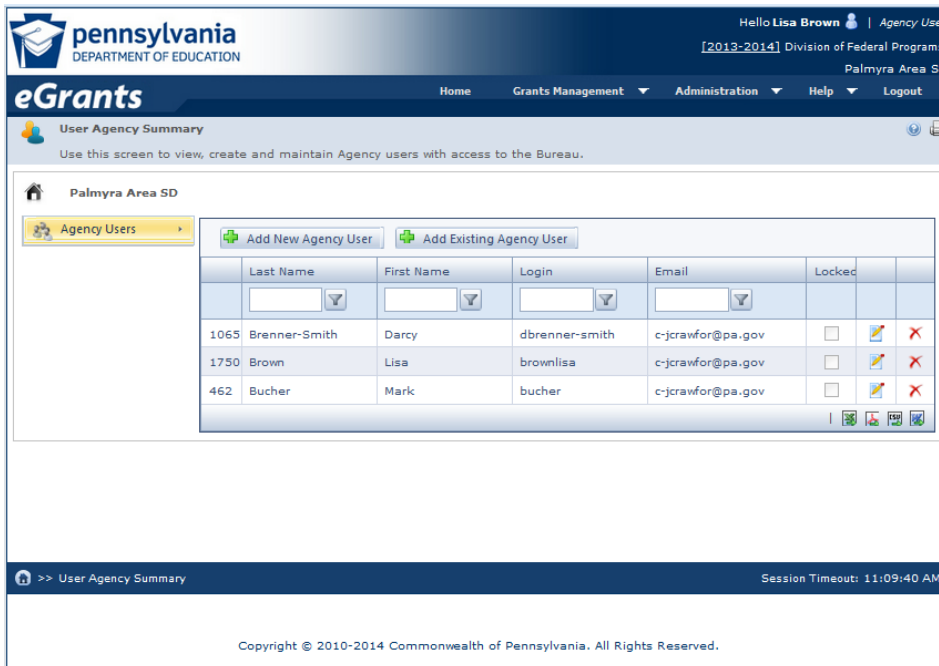
- **User records are up-to-date.**
To ensure that users who no longer represent the Agency have been inactivated, review the user records periodically. Lock users who are not currently employed. Delete users who are no longer employed.
- **Roles reflect the current user's job responsibilities.**
If Agency personnel change positions or responsibilities, their respective roles in **eGrants** may require updating. Review the roles each year for accuracy.

USER REQUESTS FOR ACCESS: If an active user reports a problem with access, the roles may have expired. Verify the assigned roles and their expiration dates.

Renew User Roles ❖ Step-by-Step


To renew one or more roles for an existing Agency user:


1. Login to **eGrants** as an Agency User Administrator.
2. If you have access to more than one **Program Office**, the **Select Program Office** window appears. Click **SELECT** beside the appropriate Program Office.
3. From the main menu bar, click **Administration > User Management**. The **User Agency Summary** screen appears.

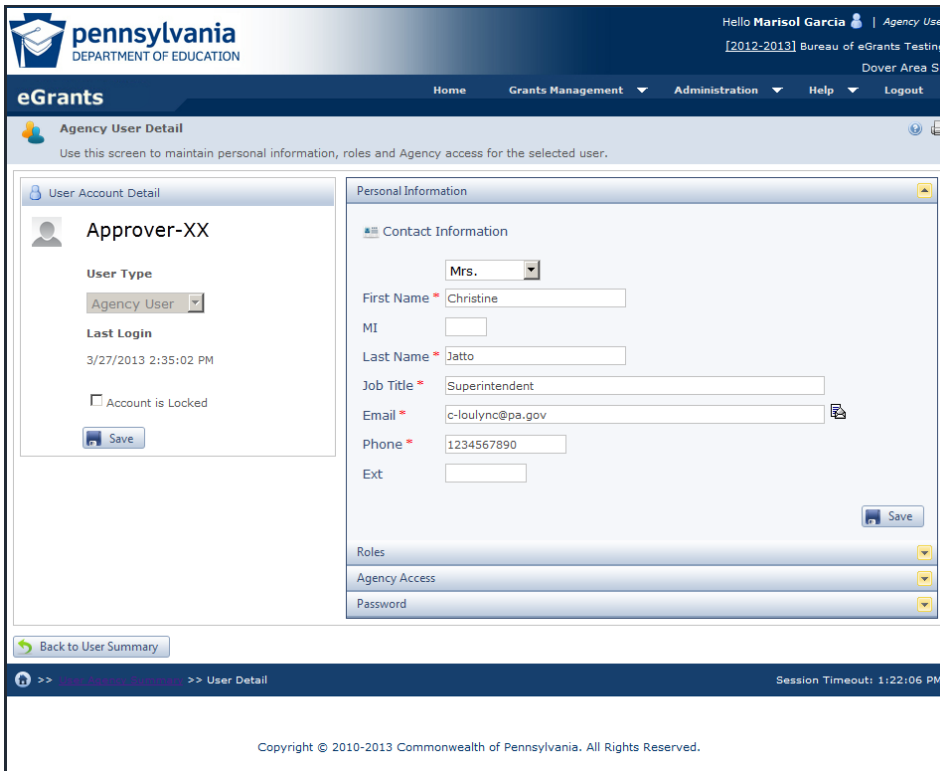


The screenshot shows the 'User Agency Summary' page for 'Palmyra Area SD'. It includes a navigation menu with 'Home', 'Grants Management', 'Administration', 'Help', and 'Logout'. The main content area has a table of users and two buttons: 'Add New Agency User' and 'Add Existing Agency User'.

	Last Name	First Name	Login	Email	Locked		
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		
1065	Brenner-Smith	Darcy	dbrenner-smith	c-jcrawfor@pa.gov	<input type="checkbox"/>		
1750	Brown	Lisa	brownlisa	c-jcrawfor@pa.gov	<input type="checkbox"/>		
462	Bucher	Mark	bucher	c-jcrawfor@pa.gov	<input type="checkbox"/>		

4. A list of all available users for your Agency appears. Locate the user to edit:
 - Click the column heading in the selection list to sort a column in alphabetical order.
 - Type all or part of the information (case-sensitive) you wish to locate in one or more fields below the column heading and click the filter icon .

- Click the **Select** icon  in the row of the user to edit. The **Agency User Detail** screen appears.



Hello **Marisol Garcia** | Agency User
 [2012-2013] Bureau of eGrants Testing
 Dover Area SD

eGrants Home Grants Management Administration Help Logout

Agency User Detail
 Use this screen to maintain personal information, roles and Agency access for the selected user.

User Account Detail

Approver-XX

User Type
Agency User

Last Login
3/27/2013 2:35:02 PM

Account is Locked

Save

Personal Information

Contact Information

Mrs.

First Name * Christine

MI

Last Name * Jatto

Job Title * Superintendent

Email * c-loulync@pa.gov

Phone * 1234567890

Ext

Save

Roles

Agency Access

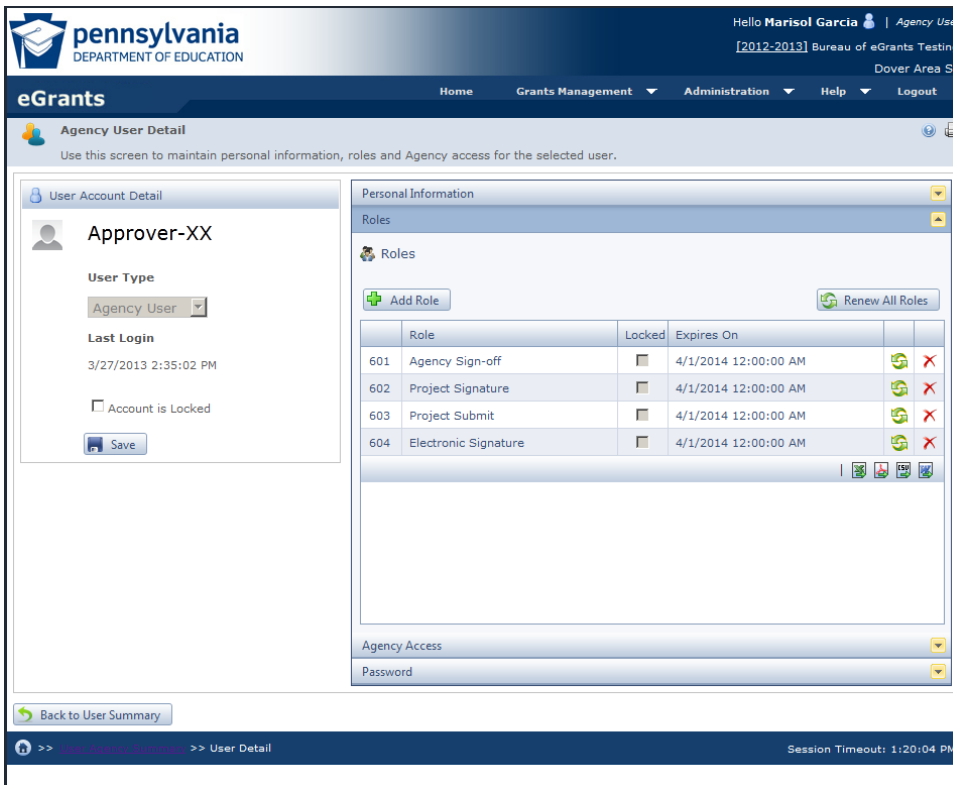
Password

[Back to User Summary](#)

Session Timeout: 1:22:06 PM

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- Click the **Roles** panel bar to expand the panel and view roles and expiration dates.



Hello **Marisol Garcia** | Agency User
 [2012-2013] Bureau of eGrants Testing
 Dover Area SD

eGrants Home Grants Management Administration Help Logout

Agency User Detail
 Use this screen to maintain personal information, roles and Agency access for the selected user.

User Account Detail

Approver-XX

User Type
Agency User

Last Login
3/27/2013 2:35:02 PM

Account is Locked

Save

Personal Information

Roles

Roles

Add Role **Renew All Roles**



	Role	Locked	Expires On		
601	Agency Sign-off	<input type="checkbox"/>	4/1/2014 12:00:00 AM		
602	Project Signature	<input type="checkbox"/>	4/1/2014 12:00:00 AM		
603	Project Submit	<input type="checkbox"/>	4/1/2014 12:00:00 AM		
604	Electronic Signature	<input type="checkbox"/>	4/1/2014 12:00:00 AM		

Agency Access

Password

[Back to User Summary](#)

Session Timeout: 1:20:04 PM

7. After reviewing the expiration dates, renew the roles as needed:
 - **Renew All Roles**
For permanent employees, all roles can be renewed at once. Click **Renew All Roles**. The expiration dates will be set for a year from the current date.
 - **Renew Roles Individually**
To renew a single role for a year from the current date, click the **Renew Expiration** icon  for the selected role. The expiration date will be set for a year from the current date.
 - **Add Role**
If a new role is needed, click the **Add Role** button to open the **Add Role to User Account** window. Check the box or boxes for new roles to add and click **Select**.
 - **Remove Role**
To remove a role, click its **Delete** icon .

Roles are saved automatically when you complete the **Add** window or edit the selection grid.

8. Click **Back to User Summary** to edit other users or perform other user management tasks.

❖ **END OF INSTRUCTIONS: “RENEW USER ROLES”**