

eGrants

learning series

creating agency users

Contents

Contents.....	1
Creating New Agency Users.....	2
Create Agency User ❖ Before You Start.....	2
Create Agency User ❖ Step-by-Step	3

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 Bureau Office User Administrator.

Note that Bureau 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. 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.

Screenshot of the eGrants User Agency Summary screen. The page shows a table of users for Palmyra Area SD. The table has columns for Last Name, First Name, Login, Email, and Locked. There are three users listed: Darcy Brenner-Smith, Lisa Brown, and Mark Bucher. Above the table are buttons for '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"/>		

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.

Screenshot of the 'Add New Agency User' window. The window contains a form with fields for Login, User Type, First Name, MI, Last Name, Job Title, Email, Phone, and Ext. A 'Save' button is at the bottom right.

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.

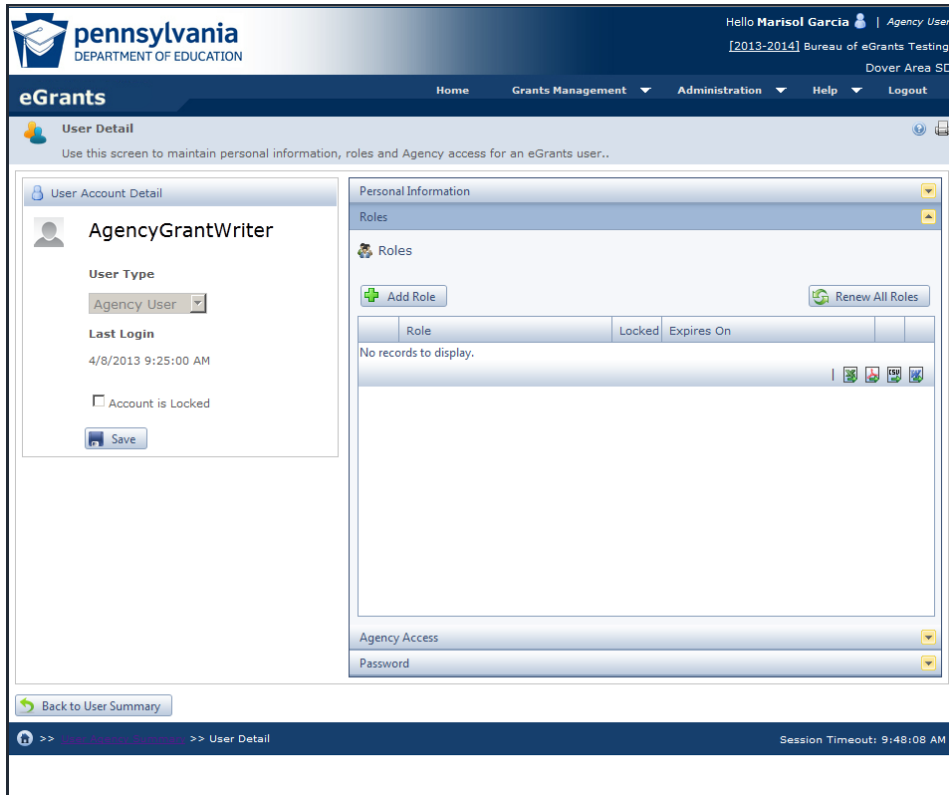
The screenshot shows the 'User Detail' screen in the eGrants system. The user being edited is 'AgencyGrantWriter'. The 'User Type' is 'Agency User'. The 'Last Login' is '4/8/2013 9:25:00 AM'. The 'Account is Locked' checkbox is unchecked. The 'Personal Information' section contains the following fields: 'Contact Information' (a dropdown menu), 'First Name' (Andrea), 'MI' (empty), 'Last Name' (Cameron), 'Job Title' (Grant Writer), 'Email' (c-loulync@pa.gov), 'Phone' (5555555555), and 'Ext' (empty). There is a 'Save' button at the bottom right of the form. The footer of the page includes 'Copyright © 2010-2013 Commonwealth of Pennsylvania. All Rights Reserved.' and 'Session Timeout: 9:45:01 AM'.

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

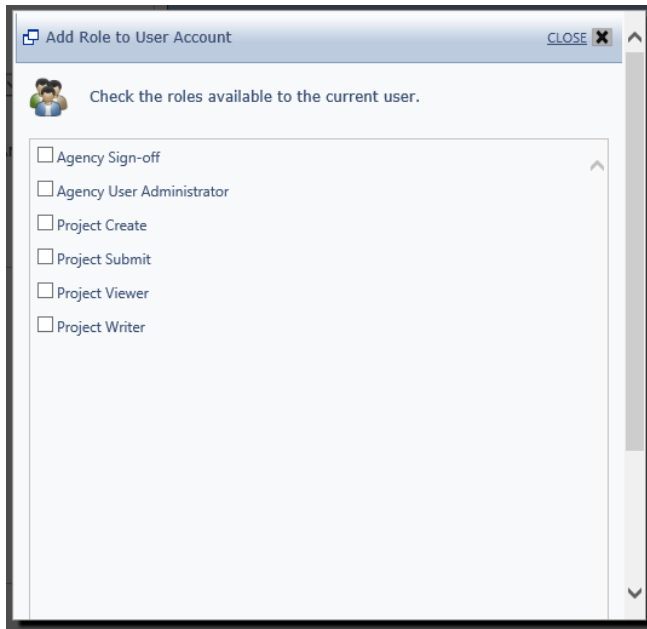
7. To add an existing agency user from another Program Office, click the **Add Existing Agency User** button, and follow the steps for adding a new agency user.

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

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



9. 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 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 the PDE legal office.

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.

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”**