Account Management System (AMS) User Guide

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CONTACT US

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Web: https://inside.era.nih.gov/eRA_helpdesk.cfm (Preferred method of contact for internal users)
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The most current version of this document will be available on the eRA website: [http://era.nih.gov](http://era.nih.gov).

**IMPORTANT:** Did you know the information in this user guide is available as online help, too? Access the New AMS Online Help directly at [http://era.nih.gov/erahelp/AMS_NEW](http://era.nih.gov/erahelp/AMS_NEW) or click the '?' icon anywhere within AMS for help specific to that screen.
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1 Overview

The Account Management System (AMS) facilitates user and system account administration based on assigned user roles. The system provides the ability to search existing accounts. When a search is performed, all records that meet the search criteria are returned on the Search Accounts screen.

Authorized users can:

- Create new user or system account(s) with an associated password.
  - The Username and password must comply with Standard eRA policy guidelines.
  - All temporary passwords are system generated.
- Manage an existing user or system account
- Manage role(s) on the user or system account
- Affiliate an account with an Organization, Agency, or Institute/Center (IC)
- Reset passwords on existing accounts (external users only)
  - NOTE: All passwords are system generated.

1.1 Agency Management Staff

Agencies, IC Coordinators, and the eRA Service Desk have the ability to search, create, maintain, and view user and system accounts for their Agency or IC. For IC Coordinators there is also the ability to assign Initial Review Group (IRG) clusters to an account.

1.2 Commons Management Staff

Once the institutional account is created, the Signing Official (SO) at each grantee organization is able to establish additional user accounts with various levels of access and capability. The SO or Accounts Administrator (AA) may then create additional accounts for the administrative and scientific staff.

SOs only can also view, create, and maintain system accounts.

1.3 iEdison Management Staff

The external iEdison management staff have the ability to search, create, maintain, and view user and system accounts for their organization. The iEdison Agency and ERL staff have the ability to search, create, maintain, and view user accounts only for their organization.

1.4 State Department Staff

The State Department staff have the ability to search, create, maintain, and view user accounts only.
2 Accessing AMS

2.1 Agency Management Staff

2.1.0.1 External Agency Management Staff

The Account Management System (AMS) is access via the eRA extranet.

1. To access the AMS Login screen click here.

The Commons Login screen is displayed.

![Commons Login Screen](image)

Figure 1: Commons Login Screen

1. Enter your Username and Password.
2. Click the Login button.

After successfully logging into the AMS, the system displays Search Accounts screen.
Figure 2: Search Accounts Screen for External Agency Users

For more information on performing a search, please see the Search Account topic.

2.1.0.2 Internal Agency Management Staff

The Account Management System (AMS) is access via the eRA Intranet.

1. Locate the Account Management System (AMS) on the Home screen under the heading Modules, User Guides & Documentation.
2. Click the + sign below the AMS name to expand the menu.
3. Click on the Quick Launch hyperlink.

When the Quick Launch hyperlink is clicked, the NIH Login screen is displayed.
Account Management System (AMS)

Figure 3: NIH Login Screen

4. Complete the Login process.
   a. Enter in your NIH **User Name**: (ID) and **Password**: OR ...
   b. Use your Smart Card and enter your Personal Identification Number (PIN) number.

5. Click the **Log in** button.

After successfully logging into the AMS, the system displays *Search Accounts* screen.
Figure 4: Search Accounts Screen for Internal Agency Users

For more information on performing a search, please see the Search Account topic.

For more information on managing IRG Clusters, please see the Manage IRG Clusters topic.

2.2 Commons Management Staff

After logging into Commons, AMS is accessed from the Admin --> Accounts --> Account Management sub-menu tab.

Figure 5: Commons Menu Tabs

When the Account Management tab is clicked, the system displays the Search Accounts screen (default screen) .
Figure 6: Search Accounts Screen for External Commons Users

For more information on performing a search, please see the Search Account topic.

2.3 iEdison Management Staff

AMS can be accessed via the iEdison Main Menu or the ERL Main Menu screen.

NOTE: It is best to search for an account first to verify that it exists before attempting to create a new account. AMS can also be accessed via the Create an iEdison Account hyperlink.

External and Agency iEdison Users
Figure 7: iEdison Main Menu Screen for External and Agency Users

iEdison ERL Users
1. Click the **Search for an iEdison Account to Modify** hyperlink on the *Main Menu* screen.

When the **Search for an iEdison Account to Modify** hyperlink is clicked, a pop-up screen displays.

![iEdison Main Menu Screen for ERL Users](image)

*Figure 8: iEdison Main Menu Screen for ERL Users*

When the **OK** button is clicked, the *Search Accounts* screen displays.

**External iEdison Users**
To access the Account Management System (AMS), follow these steps:

1. Navigate to the AMS login page.
2. Enter your credentials.
3. Click on the 'Manage Accounts' option.
4. Use the search function to locate the accounts you need.

**Search Accounts Screen for External and Agency iEdison Users**

**iEdison Agency and ERL Users**
Figure 11: Search Accounts Screen for iEdison ERL Users

For more information on performing a search, please refer to the Search Account topic.

2.4 State Department Staff

1. To access AMS click here.

The system navigates to the Commons Login screen.
Figure 12: Login Screen for State Department Users

2. Enter your **User Name** and **Password**.
3. Click the **Login** button.

Upon successful log in the default *Search Accounts* screen displays.

**NOTE:** The only **User Type** is **State**.
Figure 13: Search Accounts Screen for State Department Users

For more information on performing a search, please refer to the Search Account topic.
3 User Roles

The following users have the ability to search accounts, create accounts, manage accounts and grant or remove roles for user and system accounts:

3.1 Agency iEdison Management Staff

- iEdison Agency Administrator
- IDO Administrator
- NIH Accounts Administrator
- PO Administrator
- GMS/CMS Administrator

3.2 Agency Management Staff

- Agency Staff
- eRA Service Desk Administrators
- Institute/Center (IC) Coordinators

3.3 Commons Management Staff

- Accounts Administrator (AA)
- Administrative Official (AO)
- Business Official (BO)
- Signing Official (SO)

3.4 iEdison Management Staff

- Extramural Technology Transfer Office Administrator (Extramural TTO Admin)

3.5 State Department

- FACTS State Department Clearance Manager (FACTS SDC MGR role)
4 Search Account

4.1 User Accounts

The Search Accounts screen provides users the ability to search for existing user and system account(s) within or outside of the logged in user's organization or institution.

There are various account statuses:

- *Active* - A working user account with a role (s) for the appropriate system exists with a user profile.
- *Pending* - An Agency or Commons account owner that has not validated the account request or Data Quality needs to approve the account request
- *Pending Affiliation* - An active account not associated with an institution, organization, or a country
- *Profile Only* - The user profile is not associated with a Commons account

To search for an account, please refer to one of the following topics:

- [Search for Agency User Accounts](#)
- [Search for Commons User Accounts](#)
- [Search for iEdison User Accounts](#)
- [Search for State Department User Accounts](#)

4.2 System Accounts

Searching for system accounts can be performed by Commons, Agency, and external iEdison users. For more information on searching for system accounts, please click the appropriate hyperlink.

- [Search for System Accounts](#)

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to one of the following sections in the [Web Services Certificate (S2S) Guide](#):

- Section 2.4.1 for Agency users
- Section 2.4.2 for iEdison users
- Section 2.4.3 for Commons users

4.3 Search for User Accounts

4.3.1 Search for Agency or iEdison Agency/ERL User Accounts

The Search Accounts screen provides the ability to search for existing user and system account(s).
NOTE: You must enter at least one search field, besides the User Type and Account Status. Wild card characters such as the percent sign (%) can be used to search for a string of characters.

1. Enter the appropriate search criteria in at least one of the other search fields.
2. Perform one of the following options:
   a. Click the Search button to execute the search.
      i. Please refer to the Agency and iEdison Agency/ERL User Account Search Results topic.
   b. Click the Clear button to clear the search criteria.

If a user has appropriate privileges to work with system accounts and the User Type selected is System, then the Search within my organization check box is automatically checked. For more information please refer to the Search for System Accounts topic.

For information on Search Account error messages, please refer to the Error Messages topic.

4.3.1.1 Agency and iEdison Agency/ERL User Account Search Results

When the Search button is clicked, the system displays appropriate accounts in the Search Results located below the Search Criteria section on the Search Accounts screen. The search
results are sorted alphabetically first by last name, first name in the Name field and then by Account Status.

NOTE: The Create New Account button does not display until a search is performed.

The following columns appear in the search results:

- **User ID**
- **Name** - last name, first name
- **eRA User ID** - IMPAC II user ID
- **Email**
- **Account Status**
  - *Active* - The View button displays and the Manage button displays for the appropriate record per the logged in user's IC in the Action column.
  - *Pending Affiliation* - The View button displays and the Manage button displays for the appropriate record per the logged in user's IC in the Action column.
  - *Profile Only* - The Create button displays in the Action column.
- **Organization**
- **Secondary Org Text**
- **Action** - Option buttons are Manage, View, and Create.
Figure 15: Search Accounts Screen Displaying Search Results

Perform one or more of the following steps:

1. To view the Search Criteria, click anywhere in the Search Criteria bar.
2. To filter the search results, enter the appropriate value in the Filter: text box and hit the <Enter> key.
   a. For example, to view all users with the Secondary Org Text of DCCPS, type DCCPS in the Filter: text box.

NOTE: The default number of records per page is 10.

3. To change the number of records per page, select the appropriate number in the Show per page column.
4. To navigate between pages, perform one of the following options:
   a. Click the appropriate Page Number button.
   b. Click the right double arrows button to go to the end of the list.
   c. Click the left double arrows button to go to the beginning of the list.
5. To sort the search results, click the appropriate column heading name's **down arrow** (ascending sort) or the **up arrow** (descending sort). The default sort is by **Name** (Last Name, First Name).

6. To view the **Person Administration** screen, select the appropriate name hyperlink in the **Name** column.
   a. For more information, please see the **Person Administration** topic in the **Person Search** online help.

7. To perform one of the options in the **Action** column, please refer to the **Actions Options** topic.

8. To create a new account and profile click the **Create New Account** button at the bottom of the screen.
   a. Please refer to the **Create Account** topic.

9. To return to the top of the screen, click the **Back to top** hyperlink.

For information on Search Account error messages, please refer to the **Error Messages** topic.

**4.3.2 Search for Commons User Accounts**

The **Search Accounts** screen for Commons users provides the ability to search for existing user and system account(s).

![Search Accounts Screen for External Users](image)

*Figure 16: Search Accounts Screen for External Users*
NOTE: You must enter at least one search field, besides the User Type and Account Status. Wild card characters such as the percent sign (%) can be used to search for a string of characters.

1. Enter the appropriate search criteria in at least one of the other search fields.
2. If appropriate, select the appropriate Role.
   a. To select multiple roles, hold the <Ctrl> key and highlight the appropriate roles.

NOTE: When you search by roles, you can only search within your organization. You can select multiple roles, but the default search is for all roles appropriate to the logged in user's account role.

3. Perform one of the following options:
   a. Click the Search button to execute the search.
     i. Please refer to the Commons User Account Search Results topic.
   b. Click the Clear button to clear the search criteria.

If a user has appropriate privileges to work with system accounts and the User Type selected is System, then the Search within my organization check box is automatically checked. For more information please refer to the Search for System Accounts topic.

For information on Search Account error messages, please refer to the Error Messages topic.

4.3.2.1 Commons User Account Search Results

When the Search button is clicked, the system displays appropriate user accounts in the Search Results located below the Search Criteria section on the Search Accounts screen. The search results are sorted alphabetically first by last name, first name in the Name field and then by Account Status.

NOTE: The Create New Account button does not display until a search is performed.

The following columns appear in the search results:

- User ID
- Name - last name, first name
- Email
- Account Status -
  - Active - The Manage button displays in the Action column.
  - Pending - The Resend Email button displays in the Action column.
  - Pending Affiliation - The Manage button displays in the Action column.
  - Profile Only - The Create button displays in the Action column.
Roles & Affiliations
Action - The Action buttons are Manage, Resend Email, and Create.

NOTE: The Resend Email button is for Commons and external iEdison users only.

Figure 17: Search Accounts Screen Displaying Search Results

Perform one or more of the following steps:

1. To view the Search Criteria, click anywhere in the Search Criteria bar.
2. To filter the search results, enter the appropriate value in the Filter: text box and hit the <Enter> key.
   a. For example, to view all users with the Internet Assisted Review (IAR) role, type IAR in the Filter: text box.

NOTE: The default number of records per page is 10.
3. To change the number of records per page, select the appropriate number in the Show per page column.

4. To navigate between pages, perform one of the following options:
   a. Click the appropriate Page Number button.
   b. Click the right double arrows button to go to the end of the list.
   c. Click the left double arrows button to go to the beginning of the list.

5. To sort the search results, click the appropriate column heading name's down arrow (ascending sort) or the up arrow (descending sort). The default sort is by Name (Last Name, First Name).

6. To view the NIH Support View screen, select the appropriate name hyperlink in the Name column.
   a. For more information, please see the NIH Support View topic.

7. If displayed, click the Read More hyperlink in the Roles and Affiliations column to view a Principal Investigator's (PI) multiple affiliations.

8. To perform one of the options in the Action column, please refer to the Actions Options topic.

9. To create a new account and profile click the Create New Account button at the bottom of the screen.
   a. Please refer to the Create Commons and iEdison User Accounts topic.

10. To return to the top of the screen, click the Back to top hyperlink.

For information on Search Account error messages, please refer to the Error Messages topic.

### 4.3.3 Search for iEdison User Accounts

The Search Accounts screen for iEdison users (external, Agency, and iEdison Report Lite (ERL)) provides the ability to search for existing user and system account(s).

---

**NOTE:** For all iEdison users the Search within my organization check box is automatically checked.

---

**External iEdison User**

Here is the Search Accounts screen for iEdison external users.

---

**NOTE:** For external iEdison users the User Type is Commons.
Here is the Search Accounts screen for iEdison Agency/ERL users.

**NOTE:** For Agency/ERL users the **User Type** is *Agency.*
NOTE: You must enter at least one search field, besides the User Type and Account Status. Wild card characters such as the percent sign (%) can be used to search for a string of characters.

1. Enter the appropriate search criteria in at least one of the other search fields.
2. If appropriate, select the appropriate Role.
   a. To select multiple roles, hold the <Ctrl> key and highlight the appropriate roles.

NOTE: When you search by roles, you can only search within your organization. You can select multiple roles, but the default search is for all roles appropriate to the logged in user's account role.

3. Perform one of the following options:
   a. Click the Search button to execute the search.
      i. Please refer to the Search Results for iEdison User Accounts topic or Agency and iEdison Agency/ERL User Account Search Results
   b. Click the Clear button to clear the search criteria.

If an external iEdison user has appropriate privileges to work with system accounts and the User Type selected is System, then the Search within my organization check box is automatically checked. For more information please refer to the Search for System Accounts topic.

For information on Search Account error messages, please refer to the Error Messages topic.
4.3.3.1 External iEdison User Account Search Results

When the Search button is clicked, the system displays appropriate user accounts in the Search Results located below the Search Criteria section on the Search Accounts screen. The search results are sorted alphabetically first by last name, first name in the Name field and then by Account Status.

NOTE: The Create New Account button does not display until a search is performed.

The following columns appear in the search results:

- User ID
- Name - last name, first name
- Email
- Account Status -
  - Active - The Manage button displays in the Action column.
  - Pending - The Resend Email button displays in the Action column.
  - Pending Affiliation - The Manage button displays in the Action column.
  - Profile Only - The Create button displays in the Action column.
- Roles & Affiliations
- Action - The Action button is Manage.
Figure 20: Search Accounts Screen Displaying External iEdison Search Results

Perform one or more of the following steps:

1. To view the **Search Criteria**, click anywhere in the **Search Criteria** bar.
2. To filter the search results, enter the appropriate value in the **Filter**: text box and hit the `<Enter>` key.
   a. For example, to view all users with the Extramural TTO User role, type *TTO user* in the **Filter**: text box.

**NOTE:** The default number of records per page is 10.

3. To change the number of records per page, select the appropriate number in the **Show per page** column.
4. To navigate between pages, perform one of the following options:
   a. Click the appropriate **Page Number** button.
   b. Click the **right double arrows** button to go to the end of the list.
   c. Click the **left double arrows** button to go to the beginning of the list.

5. To sort the search results, click the click the appropriate column heading name's **down arrow** (ascending sort) or the **up arrow** (descending sort). The default sort is by **Name** (Last Name, First Name).

6. To view the **NIH Support View** screen, select the appropriate name hyperlink in the **Name** column.
   a. For more information, please see the **NIH Support View** topic.

7. If displayed, click the **Read More** hyperlink in the **Roles and Affiliations** column to view a users' multiple affiliations.

8. To perform one of the options in the **Action** column, please refer to the **Actions Options** topic.

9. To create a new account and profile click the **Create New Account** button at the bottom of the screen. Please refer to the **Create Commons or external iEdison User Accounts** topic.

10. To return to the top of the screen, click the **Back to top** hyperlink.

For information on Search Account error messages, please refer to the **Error Messages** topic

### 4.3.4 Search for State Department User Accounts

The **Search Accounts** screen for State Department users provides the ability to search for existing user accounts.

**NOTE:** For State Department users the **Search within my organization** check box is automatically checked and the only **User Type** is **State**.
**NOTE:** You must enter at least one search field, besides the **User Type** and **Account Status**. Wild card characters such as the percent sign (%) can be used to search for a string of characters.

1. Enter the appropriate search criteria in at least one of the other search fields.
2. Perform one of the following options:
   a. Click the **Search** button to execute the search.
      i. Please refer to the [State Department User Account Search Results](#) topic.
   b. Click the **Clear** button to clear the search criteria.

For information on Search Account error messages, please refer to the [Error Messages](#) topic.

### 4.3.4.1 State Department User Account Search Results

When the **Search** button is clicked, the system displays appropriate user accounts in the **Search Results** located below the **Search Criteria** section on the **Search Accounts** screen. The search results are sorted alphabetically first by last name, first name in the **Name** field and then by **Account Status**.

**NOTE:** The **Create New Account** button does not display until a search is performed.

The following columns appear in the search results:
- **User ID**
- **Name** - last name, first name
- **Email**
- **Account Status** -
  - *Active* - The **Manage** button displays in the **Action** column.
  - *Pending Affiliation* - The **Manage** button displays in the **Action** column.
- **Roles & Affiliations** - FACTS SDC MGR ROLE only
- **Action** - The **Action** buttons are **Create** and **Manage**.

*Figure 22: Search Accounts Screen Displaying State Department Search Results*

Perform one or more of the following steps:
1. To view the **Search Criteria**, click anywhere in the **Search Criteria** bar.
2. To filter the search results, enter the appropriate value in the **Filter: text box and hit the <Enter> key.**
   a. For example, to view all users with the word *Ann* in the **Name** or **User ID**, type **ANN** in the **Filter: text box.**

**NOTE:** The default number of records per page is 10.

3. To change the number of records per page, select the appropriate number in the **Show per page** column.
4. To navigate between pages, perform one of the following options:
   a. Click the appropriate **Page Number** button.
   b. Click the **right double arrows** button to go to the end of the list.
   c. Click the **left double arrows** button to go to the beginning of the list.
5. To sort the search results, click the click the appropriate column heading name's **down arrow** (ascending sort) or the **up arrow** (descending sort). The default sort is by **Name** (Last Name, First Name).
6. If displayed, click the **Read More** hyperlink in the **Roles and Affiliations** column to view a Principal Investigator's (PI) multiple affiliations.
7. To perform one of the options in the **Action** column, please refer to the **Actions Options** topic.
8. To create a new account and profile click the **Create New Account** button at the bottom of the screen.
   a. Please refer to the **Create State Department User Accounts** topic for more information.
9. To return to the top of the screen, click the **Back to top** hyperlink.

For information on Search Account error messages, please refer to the **Error Messages** topic

### 4.3.5 Funding Support Screen

The **Funding Support** screen lists the NIH application information associated with the selected Principal Investigator (PI). Use this information to positively identify PIs associated with your institution.

**NOTE:** The **Funding Support** screen is for Commons and external iEdison users only.
4.4 Search for System Accounts

The Search Accounts screen provides the ability to search for existing user and system account(s). The Search within my organization check box is automatically checked.

NOTE: iEdison Agency, iEdison ERL, and State Department users cannot search for or create system accounts.
NOTE: You must enter at least one search field, besides the User Type and Account Status. Wild card characters such as the per cent sign (%) can be used to search for a string of characters.

Perform the following steps:

1. To perform a search for a system account, select System from the User Type field's drop-down menu.

NOTE: When the User Type selected is System, then the Search within my organization check box is automatically checked.

2. Enter the appropriate search criteria in at least one of the other search fields besides User Type.
3. If appropriate, select the appropriate Role.
   a. To select multiple roles, hold the <Crtl> key and highlight the appropriate roles.

NOTE: When you search by system roles, you can only search within your organization. You can select multiple roles, but the default search is for all roles appropriate to the logged in user's account role.
4. Perform one of the following options:
   a. Click the **Search** button to execute the search.
      i. For more information on search results, see the System Account Search Results topic.
   b. Click the **Clear** button to clear the fields.

### 4.4.1 System Account Search Results

When the **Search** button is clicked, the system displays appropriate system accounts in the Search Results located below the Search Criteria section on the Search Accounts screen. The search results are sorted alphabetically first by last name, first name in the Name field and then by Account Status.

**NOTE:** The Create New Account button does not display until a search is performed.

The following columns appear in the search results:

- **User ID**
- **Name** - last name, first name
- **Organization**
- **Roles & Affiliations**
- **Certification Owner** - The Certificate Owner is the organization who acquired the certificate.
- **Action** - Option button is Manage.
Perform one or more of the following steps:

1. To view the Search Criteria, click anywhere in the Search Criteria bar.
2. To filter the search results, enter the appropriate value in the Filter: text box and hit the <Enter> key.
   a. For example, to view all users with the last name of Salem, type Salem in the Filter: text box.

**NOTE:** The default number of records per page is 10.
5. To change the number of records per page, select the appropriate number in the Show per page column.

6. To navigate between pages, perform one of the following options:
   a. Click the appropriate Page Number button.
   b. Click the right double arrows button to go to the end of the list.
   c. Click the left double arrows button to go to the beginning of the list.

7. If displayed, click the Read More hyperlink in the Roles and Affiliations column to view a system user's multiple affiliations.

8. To manage a system account, click the Manage button in the Action column.
   a. Please refer to the Manage System Accounts topic for more information.

9. To create a new account and profile click the Create New Account button at the bottom of the screen.
   a. Please refer to the Create System Account topic for more information.

10. To return to the top of the screen, click the Back to top hyperlink.

For information on Search Account error messages, please refer to the Error Messages topic.

### 4.5 Action Option Buttons

The Action column's buttons appear in the search result's depending on the account status and the logged in user's role.

The following action buttons are available:

- Create
- Manage
- Resend Email
- View

### 4.5.1 Create Button

The Create button displays on the Search Accounts screen when there is a profile, but there is no user account.

Agency Users
1. To create a Commons account, click the Create button for the appropriate person.

For more information on creating accounts, please refer to the Create Account - Agency Users topic.

Commons Users

1. To create a Commons account, click the Create button for the appropriate person.

For more information on creating accounts, please refer to the Create Account - Commons Users topic.

4.5.2 Manage Button

Agency and iEdison Agency/ERL Users

The Manage button appears if the account status is Active or Pending Affiliation for the
appropriate record per the logged in user’s IC.

Figure 28: Search Accounts for Internal Users Displaying the Manage Button

When the Manage button is clicked, the Manage Accounts screen displays.
Figure 29: Manage Account Screen for Internal Users
Account Management System (AMS)

For more information, please refer to the Manage Agency User Accounts topic.

**Commons and external iEdison Users**

The Manage button appears if the account status is *Active* or *Pending Affiliation*.

![Search Accounts for External Users Displaying the Manage Button](image)

1. To edit an account, click the appropriate Manage button.

When the Manage button is clicked, the Manage Account screen displays.
Figure 31: Manage Account Screen for External Users

For more information, please refer to the Manage Commons User Accounts topic.

**State Department Users**

For State Department users the Manage button appears if the account status is *Active* or *Pending Affiliation*. 
Figure 32: Search Accounts Displaying State Department Search Results

1. To edit an account, click the appropriate Manage button in the Action column.

When the Manage button is clicked, the Manage Account screen is displayed.
Please refer to the Manage State Department User Accounts topic for more information.

4.5.3 Resend Email Button

NOTE: For Commons and external iEdison users only the Resend Email button appears on the Search Accounts screen for user type accounts. These are accounts that are pending user review indicating that the user has not validated the account request.
Account Management System (AMS)

![Image of the Account Management System (AMS) interface]

**Figure 34: Search Accounts Screen Displaying the Resend Email Button**

1. To resend an email if present, click the **Resend Email** hyperlink for the appropriate account.

When the **Resend Email** hyperlink is clicked, the system sends an email notification to the account holder.

### 4.5.4 View Button

**NOTE:** The **View** button appears on the **Search Accounts** screen for an active account that is not within the logged in user's Agency or IC. The View feature is for **Agency Management** and **iEdison Agency Staff** only.

![Image of the Search Accounts screen with the View button highlighted]

**Figure 35: Search Accounts Screen Displaying the View Button**

1. To view the **Account Details** screen, click the appropriate **View** button.

When the **View** button is clicked, the **Account Details** screen is displayed for the appropriate account.
2. To return to the search results, click the Go Back hyperlink.
3. To start a new search, click the Back to Search button.
5 Create Accounts

There is the ability to create the following accounts:

- User Accounts
- System Accounts

5.1 Create User Accounts

There are various types of user accounts:

- Agency and iEdison Agency/ERL
- Commons and iEdison
- State Department

5.1.1 Create Agency or iEdison Agency/ERL User Accounts

1. To create an account perform a search first.
   a. Please refer to the Search for Agency User Accounts topic or Search for iEdison User Accounts.

The Create Account screen is displayed when one of the following buttons is clicked on the Search Accounts screen:

- Create button for existing accounts
  - The Create button displays when there is a user profile, but there is no user account.
- Create New Account button

IMPORTANT: For iEdison Agency/ERL users the Internet Review Group (IRG) Clusters and the Upload User Account Form functionality does NOT apply and are NOT viewable.
Perform the following steps:

1. The **User Type** is Agency.
2. Enter the **User ID** or let the system generate one.
   a. The **User ID** length should be between 6 and 30 characters and should **NOT** contain special characters except the @ sign, the hyphen, the period, and the underscore.
   b. The system can display the following messages: *This User ID is available* or *This User ID is already taken, please use another one.*
3. Usually the **Primary Organization** defaults to the logged in user's organization.
   a. If present, click the magnifying glass icon to assign a **Primary Organization**.
   b. Please refer to the [Set Primary Organization](#) topic.

4. For **Contact Information**, enter the **Last Name** and the **First Name**.
5. Enter the **Email** and **Confirm Email** addresses.
6. To add roles, please refer to the [Add/Delete Roles](#) topic.
7. To add clusters, please refer to the [Add/Delete IRG Clusters](#) topic.
8. To upload the Account Request Form, please refer to the [Upload Account Request Form](#) topic.
9. Perform one of the following options:
   a. When the account information is complete, click the **Create** button.
   b. Click the **Clear** button to clear the data entered in the fields.

When the **Create** button is clicked, the system displays the following message on the **Account Details** screen: *Account created successfully.*
Figure 38: Account Details Screen Displaying Message

9. Perform one of the following options:
   a. To return to the Search Accounts screen displaying the previous search results, click the Go Back hyperlink.
   b. To edit the account's information, click the Manage button.
      i. For more information, please refer to the Manage Agency and iEdison Agency/ERL User Accounts topic.
   c. To return to the Search Accounts screen to enter new search criteria, click the Back to Search button.

5.1.2 Create Commons or external iEdison User Accounts

1. To create an account perform a search first.
   a. Please refer to the Search Account for Commons Accounts or the Search for iEdison User Accounts topic.

NOTE: For external iEdison users, the Create Account screen can be access by clicking the Create an iEdison Account hyperlink on the iEdison Main Menu screen.

The Create Account screen is displayed when one of the following buttons is clicked on the Search Accounts screen:

- Create button in the Action column for existing accounts
- The Create button displays when there is a user profile, but there is no user account.
Figure 39: Create Account Screen for an Existing External Account

- **Create New Account** button
Perform the following steps:

2. The **User Type** is Commons.

3. Enter the **User ID** or let the system generate one.
   a. The **User ID** length should be between 6 and 30 characters and should **NOT** contain special characters except the @ sign, the hyphen, the period, and the underscore.
   b. The system can display the following messages: *This User ID is available* OR *This User ID is already taken, please use another one.*

4. Usually the **Primary Organization** defaults to the logged in user's organization.
   a. If there is no user organization name, click the magnifying glass icon to assign a **Primary Organization**.
   b. Please refer to the **Set Primary Organization** topic for more information.

5. Perform one of the following options:
   a. When the account information is complete, click the **Create** button.
   b. Click the **Clear** button to clear the data entered in the fields.

When the **Create** button is clicked, the system displays the following message on the **Account Details** screen: *Account created successfully.*
Figure 41: Account Details Screen Displaying Message

6. Perform one of the following options on the Account Details screen:
   a. To return to the Search Accounts screen displaying the previous search results, click the Go Back hyperlink.
   b. To edit the account's information, click the Manage button.
      i. For more information, please refer to the Manage Account for Commons Users topic.
   c. To return to the Search Accounts screen to enter new search criteria, click the Back to Search button.

5.1.3 Create State Department User Accounts

1. To create an account perform a search first.
   a. Please refer to the Search Account for State Department Users topic.

When the Create New Account button is clicked on the Search Accounts screen, the Create Account screen is displayed.
Perform the following steps:

2. The **User Type** is State.
3. Enter the **User ID** or let the system generate one.
   a. The **User ID** length should be between 6 and 30 characters and should **NOT** contain special characters except the @ sign, the hyphen, the period, and the underscore.
   b. The system can display the following messages: *This User ID is available* OR *This User ID is already taken, please use another one.*
4. To add countries, click the + **Add Countries** button.
   a. Please refer to the Add Countries topic for more information.
5. Perform one of the following options:
   a. When the account information is complete, click the **Create** button.
   b. Click the **Clear** button to clear the data entered in the fields.

When the **Create** button is clicked, the system displays the following message on the Account Details screen: *Account created successfully.*
6. Perform one of the following options on the Account Details screen:
   a. To return to the Search Accounts screen displaying the previous search results, click the Go Back hyperlink.
   b. To edit the account's information, click the Manage button.
      i. For more information, please refer to the Manage State Department User Accounts topic.
   c. To return to the Search Accounts screen to enter new search criteria, click the Back to Search button.

5.1.3.1 Add/Delete Countries

NOTE: The Add Countries functionality is for State Department users only.

1. To add a country to the account, click on the + Add Countries button on the Create Accounts screen.
When the + Add Countries button is clicked, the pop-up Add Countries screen displays.

2. To find a country, click in the list of countries and type the first letter of the country's name.
   a. For example, to find the United Kingdom hit the <U> key on the keyboard.

3. Highlight the appropriate country name.

When a country name is highlighted, the Add Countries button is enabled.

4. Perform one of the following options:
   a. Click the Close button to close the screen.
   b. Click the Add Countries button to add the selected country.

When the Add Countries button is clicked, the selected country to added the Roles section on the Create Account or Manage Account screen.
5. To add another country, click the **Add Countries** button. Repeat the steps above.
6. To remove a country, click the **X Remove** button.
7. To remove all countries, click the **X Remove All** button.

### 5.1.4 Add/Delete User Roles

**NOTE:** The list of roles displayed is dependent on the logged in user's role.

**NOTE:** State Department users only - For information on adding countries, please refer to the [Add/Delete Countries](#) topic.

1. To add user roles to the account, click on the **+ Add Roles** button on the **Create Accounts** screen.

### 5.1.4.1 Commons Users

When the **+ Add Roles** button is clicked, the pop-up **Add Roles** screen displays.
Account Management System (AMS)

Figure 48: Add Roles Screen for Commons Users

1. Highlight the appropriate role(s).
2. Click the Add Role(s) button.

When the Add Roles(s) button is clicked, the system returns to the Create Account or Manage Account screen and displays the newly added role(s).

Figure 49: Roles Section on the Create Accounts Screen for Commons Users

3. To add additional roles, click the + Add Roles(s) button. Repeat the steps above.
4. To remove a role click the appropriate Remove button in the Action column.
5. To remove all roles click the Remove All button.

NOTE: You cannot remove Signing Official (SO) role when the Research Performance Progress Report (RPPR) is assigned.
5.1.4.2 Agency and iEdison Agency/ERL Users

**IMPORTANT:** For Agency and iEdison Agency users there are certain combination of roles that cannot be granted to an account for a specific IC.

<table>
<thead>
<tr>
<th>List of Conflicting Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>RR CHIEF_ROLE and GM_MANAGER_ROLE</td>
</tr>
<tr>
<td>ICO PROGRAM OFFICIAL ROLE and GM_MANAGER_ROLE</td>
</tr>
<tr>
<td>RR_SUPERVJSOR_ROLE and GM_MANAGER_ROLE</td>
</tr>
<tr>
<td>(This role combination requires a waiver from the OPERA Director.)</td>
</tr>
<tr>
<td>UADM_USER_ROLE and GM_MANAGER_ROLE</td>
</tr>
<tr>
<td>UADM_USER_ROLE and GM_FMO_ROLE</td>
</tr>
<tr>
<td>IPF_CLERK_ROLE and GM_MANAGER_ROLE</td>
</tr>
<tr>
<td>IPF_SPECIALIST_ROLE and GM_MANAGER_ROLE</td>
</tr>
<tr>
<td>IPF_SUPER_USER_ROLE and GM_MANAGER_ROLE</td>
</tr>
<tr>
<td>GM_MANAGER_ROLE and GM_FMO_ROLE</td>
</tr>
<tr>
<td>UADM_ADMIN_ROLE and GM_MANAGER_ROLE</td>
</tr>
<tr>
<td>UADM_ADMIN_ROLE and ICO_PROGRAM_OFFICIAL_ROLE</td>
</tr>
<tr>
<td>UADM_ADMIN_ROLE and GM_FMO_ROLE</td>
</tr>
</tbody>
</table>

*Table 1: List of Conflicting Roles*

**NOTE:** For iEdison Agency users the roles are IDO Admin and IDO User. For iEdison ERL users the roles are EDI_GMS_CMS_ADMIN and EDI_GMS_CMS_USER.

When the *Add Roles* button is clicked, the pop-up *Add Agency Roles* screen displays.
Figure 50: Add Agency Roles Screen for Internal Users

1. Select the appropriate Business Area from the drop-down menu or start typing in the text box. For example, start typing "G" to access the GM Business Area roles.
Figure 51: The Business Area Drop-down Menu on the Add Agency Roles Screen

2. Select the appropriate role from the drop-down menu per the Business Area selected.

![Image of the Business Area Drop-down Menu](image1)

Figure 52: The Role Drop-down Menu on the Add Agency Roles Screen

3. Click the **Add to Selected Role(s)** button.

![Image of the Add to Selected Role(s) Button](image2)

Figure 53: Add Agency Roles Screen Displaying the Add to Selected Role(s) Button

When the **Add to Selected Role(s)** button is clicked, the role is added on the **AMS | Add Roles** screen.
4. To add the role to the account, click the **Add Selected Role(s) to Account** button.

When the **Add Selected Role(s) to Account** button is clicked, the added role is displayed on the **Create Accounts** or **Manage Account** screen.

5. To add additional roles, click the **+ Add Roles(s)** button. Repeat the above steps.
6. To remove a role click the appropriate **Remove** button in the **Action** column.
NOTE: Multiple roles can be added at the same time.

7. To add multiple roles, start typing a head in the Roles text box.
   a. For example, start typing G to access the GM Business Area roles.

8. Select the appropriate role for that Business Area.

9. Start typing a head the next desired Business Area such as IPF.

![Add Agency Roles Screen Displaying Adding Multiple Roles](image_url)

Figure 56: Add Agency Roles Screen Displaying Adding Multiple Roles

10. Select the next appropriate role.
11. Click the **Add to Selected Role(s)** button to add the selected roles.
12. Click the **Add Selected Role(s) to Account** button.

When the **Add Selected Role(s) to Account** button is clicked, the added role is displayed on the **Create Accounts** or **Manage Account** screen.

### 5.1.4.3 External iEdison Users

When the **+ Add Roles** button is clicked on the **Create Account** or **Modify Account** screen, the
pop-up "Add Roles" screen displays.

![Add Roles Screen](image)

**Figure 59: Add Roles Screen for External iEdison Users**

1. Select the appropriate role.
2. Click the **Add Roles(s)** button.

When the **Add Roles(s)** button is clicked, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).

![Roles Section](image)

**Figure 60: Roles Section on the Create Accounts Screen for External iEdison Users**

3. To add additional roles, click the + **Add Roles(s)** button. Repeat the steps above.
4. To remove a role click the appropriate **Remove** button in the *Action* column.
5. To remove all roles click the **Remove All** button.

### 5.1.5 Add/Delete Initial Review Group (IRG) Clusters

**NOTE:** Adding and deleting IRG Clusters is for **internal Agency** users only.
1. To add a cluster click the + Add Clusters button on the Create Accounts or Manage Account screen.

![Clusters Buttons](image1)

Figure 61: Clusters Buttons

When the + Add Clusters button is clicked, the pop-up Add Clusters screen is displayed.

![AMS | Add Clusters Screen](image2)

Figure 62: AMS | Add Clusters Screen

2. To add a cluster, highlight the appropriate cluster(s).
3. Click the Add Cluster(s) button.

When the Add Cluster(s) button is clicked, the cluster(s) is added to the Clusters section on the Create Account or Manage Account screen.

![Clusters](image3)
Figure 63: Clusters Section on the Create Account Screen

4. To add additional clusters, click the + Add Clusters button. Repeat the steps above.
5. To remove all clusters click the Remove All button.
6. To filter the cluster list, type the appropriate text in the Filter: text box.
7. To navigate through the cluster list, perform any one of the following options:
   a. Click the appropriate Page Number.
   b. Click the right double arrows to go to the end of the list.
   c. Click the left double arrows to go to the beginning of the list.
8. To indicate that the person is the cluster Chief, select the appropriate check box in the Chief? column.
9. To remove a cluster click the appropriate Remove button in the Action column.

5.1.6 Set Primary Organization

NOTE: The magnifying glass for the Primary Organization field on the Create Account screen appears if the logged in user is not affiliated with an Organization, IC, or Agency. Usually the Primary Organization defaults to the logged in user's Organization, etc.

Figure 64: Primary Organization Field

1. To add a primary organization click the magnifying glass icon on the Create Account screen.

When the magnifying glass icon is clicked, the Search Organization and Add Roles screen displays.
2. Enter an Org ID or an Organization Name.

**NOTE:** Wild card characters such as the percent sign (%) can be used to search for a string of characters.

3. Click the first Search button.

When the first Search button is clicked, the organization is displayed, if present.

4. To filter the search results, enter the appropriate value in the Filter: text box and hit the <Enter> key. For example, enter San Diego to view only those universities in California.

5. To change the number of records per page, select the appropriate number in the Show per page column.

6. To navigate between pages, perform one of the following options:
   a. Click the appropriate Page Number button.
   b. Click the right double arrows button to go to the end of the list.
   c. Click the left double arrows button to go to the beginning of the list.
7. Select the appropriate organization's radio button.
8. Click the second **Select** button or click the **Close** button to close the screen.

When the second **Select** button is clicked, the *Create Account* screen displays the selected primary organization. Please refer to the [Create Commons User Accounts](#) or the [Create Agency User Accounts](#) topics.

### 5.1.7 Upload Account Request Form

Institute/Center (IC) Coordinators now have the ability to upload the Account Request Form or an IC specific account request form on the *Create Account* screen when creating a new IMPAC II user account with roles. The following rules apply:

1. This form is mandatory when creating a new user account.
2. The form must be a Word or PDF document and the size limit is 35MB.


1. To upload the Account Request Form or an IC specific account request form, click the **Browse** button (click here).

   ![Upload Account Request form](image)

   *Figure 66: Upload Account Request Form Section on Create Account Screen*

2. Locate and select the Account Request Form to be uploaded.

Once the form is uploaded the path and file name displays in the text box.

**IMPORTANT:** Before clicking the **Create** button on the *Create Account* screen, ensure that the correct document is uploaded. Another document can be uploaded to replace the previous document, but once the **Create** button is clicked another document CANNOT be uploaded.

### 5.2 Create System Accounts

Creating system accounts can be performed by Commons, Agency, and external iEdison users.
NOTE: iEdison Agency/ERL and State Department users cannot create system accounts.

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to one of the following sections in the Web Services Certificate (S2S) Guide:

- Section 2.4.1 for Agency users - internal Agency users should contact their IC Coordinator to register the certificate; the IC Coordinator is the only one who is authorized to register the certificate
- Section 2.4.2 for iEdison users - only users with the TTO Admin user role have the privileges necessary to register the certificate in AMS; iEdison users must work with their TTO Admin user to register their certificate
- Section 2.4.3 for Commons users - only users with the SO role have the privileges necessary to register the certificate in AMS; Commons users must work with their SO to register their certificate

1. To create a system account, perform a search first.
   a. Please refer to the Search System Accounts topic.

NOTE: The Create New Account button does not display until a search is performed.

2. To create a system account, click the Create New Account button located below the search results.

When the Create New Account button is clicked, the Create Account screen displays.

3. Select System for User Type.

When System is selected for User Type, the Create Account screen displays the appropriate fields that need to be completed for a system account.

Here is a sample Create Account screen with the fields completed.
4. Type in the owner in the **Certificate Owner** field. The **Certificate Owner** is the organization who acquired the certificate.

5. Select the appropriate **Certificate Provider/Authority** from the drop-down menu.

**NOTE:** Examples of the values that are available for the Certificate Provider/Authority include: Comodo, Digicert, Entrust, Geo Trust, Go Daddy, InCommon, and Thawte.
6. Type in the **Certificate Serial Number**.

**NOTE:** The **Certificate Serial Number** format is XX:XX:XX:XX:XX:XX:XX:XX.

7. Complete the **Contact Information**.
8. Click the + **Add Roles** button to add the appropriate role(s).
   a. Note the role description on the screen when adding a role.
   b. See the [Add System Roles] topic for more information.
9. Select the **Agreement** check box below the **Roles** section.

The **Agreement** check box is mandatory for the user to acknowledge information provided for the system account. If the **Agreement** check box is not checked and the **Save** button is clicked, the system displays the following error message: *User must accept the agreement by checking the field.*

10. Perform one of the following options:
   a. Click the **Create** button to create the account.
   b. Click the **Clear** button to clear the fields on the screen.

The system performs validations when the **Create** button is clicked. If there are no error messages, then the system displays the **Account Details** screen with the following message: *Account created successfully!*
Figure 68: Create Account Screen Displaying Account Created Message

11. Click the **Validate Certificate** button to validate the certificate.
   a. See the [Validate Certificate](#) topic for more information.

12. Click the **Manage** button to make any additional changes.
   a. See the [Manage System Accounts](#) topic for more information.

13. Click the **Back to Search** button to return to the [Search Account](#) screen.

### 5.2.1 Add System Roles

**NOTE:** The list of roles is dependent on the logged in user's role.
1. To add system roles to the account, click on the + **Add Roles** button on the *Create Accounts* screen.

![Add Roles Button on the Create Account Screen](image)

When the + **Add Roles** button is clicked, the pop-up *Add Roles* screen displays.

**External System Roles**

![Add Roles Screen for External System Roles](image)

**Agency System Roles**
Create Accounts System (AMS)

Figure 71: Add Roles Screen Displaying Agency System Roles List

1. Highlight the appropriate role(s).
2. Click the Add Role(s) button.

When the Add Roles(s) button is clicked, the system returns to the Create Account or Manage Account screen and displays the newly added role(s).

Figure 72: Roles Section on the Create Accounts Screen for Agency Users

3. To add additional roles, click the + Add Roles(s) button. Repeat the steps above.
4. To remove a role click the appropriate Remove button in the Action column.
5. To remove all roles click the Remove All button.

5.2.2 Validate Certificate

When the Validate Certificate button is clicked on either the Manage Account or Account Details confirmation screen, the system displays the AMS | Validate Certificate screen with hyperlinks to instructions for the different browsers (i.e. Internet Explorer, Firefox, and Safari, etc.) for uploading a certificate file.
1. Perform one of the following options:
   a. To validate the certificate, click the **Validate** button on the Validate Certificate screen.
   b. Click the **Cancel** button to cancel the certificate validation.

![Validate Certificate Screen](image)

*Figure 73: Validate Certificate Screen*

When the **Validate** button is clicked, the system performs the certificate validation.

If the browser call does go through to the certificate provider, but the details of the uploaded certificate do not match the details entered in AMS, then the following warning message is displayed:
Warning! - This certificate works with eRA systems correctly, but the certificate details you entered in the account do not match information in the certificate you are trying to validate. Certificate information in the account must match certificate you are trying to validate.

Please information on Validate Certificate error messages, please refer to the Error Messages topic.

If there are no validation errors, a second Validate Certificate screen displays the following success message: 

Success! Your certification works with the eRA systems as expected.

---

Figure 74: Validate Certificate Screen Displaying the Success Message

2. Click the Close button to close the screen.

The following audit information is audited and stored in the database:
Account Management System (AMS)

- Certificate Number – Certificate Number of the uploaded certificate during validation
- Certificate Provider – Common Name of the uploaded certificate during validation
- Certificate Owner – The Certificate Owner that was entered during validation. The Certificate Owner is the organization who acquired the certificate.
- Time of Validation – Format: DD/MM/YYYY HH:MM:SS
- Result of Validation Attempt
  - Success
  - Validation is successful but the certificate details does not match the user entered details
6 Manage Accounts

6.1 User Accounts

Once an account is created it can be maintained via the Manage Accounts screen.

- Manage Commons and external iEdison User Accounts
- Manage Agency and iEdison Agency/ERL User Accounts
- Manage State Department User Accounts

6.2 System Accounts

Modifying system accounts can be performed by external and internal (Agency) users.

- Manage System Accounts

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to one of the following sections in the Web Services Certificate (S2S) Guide:

- Section 2.4.1 for Agency users
- Section 2.4.2 for iEdison users
- Section 2.4.3 for Commons users

6.3 User Accounts

6.3.1 Manage Agency and iEdison Agency/ERL User Accounts

1. Perform one of the following steps to edit an account:
   a. Click the appropriate Manage button in the Action column on the Search Accounts screen.
   b. Click the Manage button on the Account Details screen after an account have been created or saved (edited).

When the Manage button is clicked via either option, the Manage Accounts screen is displayed. Here is the Manage Account screen with a non-affiliated account with an Agency or Institute.
Here is the Manage Account screen with an affiliated account with an Agency or Institute.
Figure 76: Manage Account Screen with an Affiliated Account
NOTE: Fields grayed out cannot be edited.

An affiliation can be created for accounts that are either not currently associated with an institution, such as an account solely with the Internet Assisted Reviewer (IAR) authority role, or for accounts that need to be associated with multiple institutions.

NOTE: Users with the AA or SO role may create an affiliation for their organization only.

Perform one or more of the following steps:

1. To view the profile, click the **View Full Profile** hyperlink.
   a. Please refer to the **Person Administration** topic in the Person Search online help for more information.

2. Edit the **Email** addresses, if necessary.

3. To add roles click the **Add Roles** button.
   a. For more information, please refer to the **Add Roles** topic.

4. To affiliate an account with an agency or IC, click the **Affiliate** button.
   a. For more information, please refer to the **Affiliate Account** topic.

5. To unaffiliate a PI, click the **Unaffiliate** button.

6. To deactivate an account, click the **Deactivate** button.
   a. For more information, please refer to the **Unaffiliate Account** topic.

7. Perform one of the following options:
   a. Click the **Save** button to save the changes.
   b. Click the **Cancel** button to clear the fields.

When the **Save** button is clicked, the system displays the following message on the **Account Details** screen: *Account was updated successfully!*.
Figure 77: Account Details Screen Displaying Successful Message

8. Perform one of the following options:
   a. To return to the Search Accounts screen displaying the previous search results, click the **Go Back** hyperlink.
   b. To edit the account's information, click the **Manage** button.
   c. To return to the Search Accounts screen to enter new search criteria, click the **Back to Search** button.
6.3.2 Manage Commons and External iEdison User Accounts

NOTE: Managing Commons user accounts is also applicable to external iEdison user accounts.

The following roles can manage accounts:

- Account Administrator (AA)
- Administrative Official (AO)
- Business Official (BO)
- Signing Official (SO)
- TTO Administrator

1. Perform one of the following steps to edit an account:
   a. Click the appropriate Manage button in the Action column on the Search Accounts screen.
   b. Click the Manage button on the Account Details screen after an account have been created or saved (edited).

When the Manage button is clicked via either option, the Manage Accounts screen is displayed.

Here is the Manage Account screen with an account not affiliated with an Organization or Institution.
Here is the Manage Account screen with a user account affiliated with an Organization or Institute.
An affiliation can be created for accounts that are either not currently associated with an institution, such as an account solely with the Internet Assisted Reviewer (IAR) authority role, or for accounts that need to be associated with multiple institutions. Users with the AA or SO role may create an affiliation for their organization only.

**NOTE:** Only accounts with IAR, PI, TRAINEE, POSTDOC or SPONSOR roles may have multiple affiliations. If an account has any roles in addition to these, the affiliation cannot proceed.

**NOTE:** Fields grayed out cannot be edited.

Perform one or more of the following steps:
Account Management System (AMS)

1. Edit the **Email** addresses, if necessary.
2. To add or delete roles click the + **Add Roles** button.
   a. For more information, please refer to the **Add/Delete Roles** topic.
3. To affiliate an account with an organization, click the **Affiliate** button, if displayed.
   a. For more information, please refer to the **Affiliate Account** topic.
4. To unaffiliate an account, click the **Unaffiliate** button, if displayed.
   a. For more information, please refer to the **Unaffiliate Account** topic.
5. Perform one of the following options:
   a. Click the **Save** button to save the changes.
   b. Click the **Cancel** button to clear the fields.

When the **Save** button is clicked, the system displays the following message on the *Account Details* screen: *Account was updated successfully!*

![Account Details Screen Displaying Successful Message](image.png)

*Figure 80: Account Details Screen Displaying Successful Message*
6. Perform one of the following options:
   a. To return to the Search Accounts screen displaying the previous search results, click the Go Back hyperlink.
   b. To edit the account's information, click the Manage button.
   c. To return to the Search Accounts screen to enter new search criteria, click the Back to Search button.

6.3.3 Manage State Department User Accounts

1. Perform one of the following steps to edit an account:
   a. Click the appropriate Manage button in the Action column on the Search Accounts screen.
   b. Click the Manage button on the Account Details screen after an account have been created or saved (edited).

When the Manage button is clicked via either option, the Manage Accounts screen is displayed.
Figure 81: Manage Account Screen for State Department Users

NOTE: Fields grayed out cannot be edited.

Perform one or more of the following steps:

1. Edit the Email addresses, if necessary.
2. Click the + Add Countries button to add countries.
   a. For more information, please refer to the Add/Delete Countries topic.
3. Click the Remove button to remove a country from the list in the Roles section.
4. Click the Reset Password button to reset the user's password.
   a. Please refer the Reset Password topic for more information.
5. Perform one of the following options:
   a. Click the **Save** button to save the changes.
   b. Click the **Cancel** button to return to the *Account Details* screen.

When the **Save** button is clicked, the *Account Details* screen displays with the following message: *Account was updated successfully!*

![Account Details Screen for State Department Users](image)

6. Perform one of the following options on the *Account Details* screen:
   a. To return to the *Search Accounts* screen displaying the previous search results, click the **Go Back** hyperlink.
   b. To edit the account's information, click the **Manage** button.
   c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

### 6.4 **Manage System Accounts**

Modifying system accounts can be performed by Commons, Agency, and external iEdison users.
Account Management System (AMS)

NOTE: iEdison Agency/ERL and State Department users cannot create or manage system accounts.

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to one of the following sections in the Web Services Certificate (S2S) Guide:

- Section 2.4.1 for Agency users
- Section 2.4.2 for iEdison users
- Section 2.4.3 for Commons users

Perform the following steps:

1. To manage a system account perform a search.
   a. See the Search for System Accounts topic for more information.
2. Click the Manage button in the search results for the appropriate system account.

When the Manage button is clicked, the Manage Account screen displays.

NOTE: Fields grayed out cannot be edited.
Figure 83: Manage Account Screen for Commons Management Staff
3. Edit any non-gray fields.
4. To add roles, click the + Add Roles button.
   a. See the Add Roles topic for more information.
   b. See the System Roles topic for information on the different system roles.
5. To remove a role, click the appropriate X Remove button.
6. To remove all roles, click the X Remove All button.
7. For **internal (Agency) users ONLY** click the **Deactivate** button to deactivate an account.
   a. See the **Deactivate Account** topic for more information.

8. Perform one of the following options:
   a. Click the **Save** button to save the changes.
   b. Click the **Cancel** button to cancel the changes.

When the **Cancel** button is clicked, the **Account Details** screen is displayed.

When the **Save** button is clicked, the **Account Details** screen displays with the following message: **Account created successfully**.
Perform one of the following options on the Account Details screen:

a. If the certificate needs to be validated, click the Validate Certificate button.
   i. See the Validate Certificate topic for more information.

b. To return to the Manage Accounts screen, click the Manage button or the Go Back hyperlink.

c. To return to the Search Accounts screen to enter new search criteria, click the Back to Search button.
6.5 **Affiliate Account**

**Commons Users**

1. To affiliate an account with an organization, click the **Affiliate** button in the *Roles* section on the *Manage Account* screen.

When the **Affiliate** button is clicked, the *Add Roles* screen displays.

**NOTE:** The list of roles is dependent on the logged in user's role.

![Add Roles Screen](image)

**Figure 87: Add Roles Screen**

1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

When the **Add Role(s)** button is clicked, the role is added and the **Unaffiliate** button is displayed in the *Roles* section on the *Manage Account* screen.

![Roles Section](image)
6.6 Unaffiliate Account

6.6.1 Commons Users and Agency Users

1. To unaffiliate an account, click the Unaffiliate button in the Roles section on the Manage Account screen.

When the Unaffiliate button is clicked, an Account Unaffiliation pop-up screen displays.

![Account Unaffiliation Screen](image)

2. Perform one of the following options:
   a. Click the No button to cancel the unaffiliation.
   b. Click the Yes button to unaffiliate the account.

When the Yes button is clicked, the all roles assigned to the account are removed and the Affiliate button appears in the Role section on the Manage Account screen.

![Affiliate Button](image)

6.7 Deactivate Account

NOTE: The Deactivate Account feature is for Agency Management Staff only.
When the **Deactivate** button is clicked on the *Manage Account* screen, the *Deactivate Account* screen displays.

![Deactivate Account Screen](image)

*Figure 91: Deactivate Account Screen*

1. Enter a required comment.

**NOTE:** The **Deactivate** button is grayed out until a comment is entered.

2. Perform one of the following options:
   a. Click the **Deactivate** button to deactivate the account.
   b. Click the **Close** button to close the screen.

When the **Deactivate** button is clicked, the system removes the mapping between the NIH/Agency User ID and the eRA User ID and removes all assigned roles. The account information does not display when performing a search.

### 6.8 Reset Password

**NOTE:** The Reset Password functionality is for **Commons Management Staff**, **State Department Staff**, and **external iEdison** users only.

1. To reset a user's account password, click the **Reset Password** button located in the lower right side on the *Manage Accounts* screen.

When the **Reset Password** button is clicked, the pop-up **Resent Password** screen displays and an eMail Notification is sent to the appropriate user.
2. Click the **Close** button to close the screen.
7 Change Password

NOTE: The Change Password functionality is for Commons Management Staff and external iEdison users only.

1. Perform one of the following options:
   a. For external iEdison users, click the Change Your Password hyperlink on the Main Menu screen.
   b. For Commons users, click the Change Password tab.

![Modify Your iEdison Account Information](image)

*Figure 93: iEdison Main Menu Screen Displaying Change Your Password Hyperlink*

![Commons Menu Tabs Displaying the Change Password Tab](image)

*Figure 94: Commons Menu Tabs Displaying the Change Password Tab*

For iEdison users, when the Change Your Password hyperlink is clicked, a pop-up screen displays.

![Message from webpage](image)

*Figure 95: Accessing AMS Pop-up Screen*
When the OK button is clicked on the pop-up screen or the Change Password tab is clicked, the Change Password screen displays in a separate browser window.

**Figure 96: Change Password Screen**

2. Enter your **Current Password**.
3. Enter a **New Password**.
4. Type your new password a second time in the **Confirm New Password** field.
5. Perform one of the following options:
   a. Click the **Save** button to save the changes.
   b. Click the **Clear** button to clear the fields.

Use your new password the next time that you log into Commons or iEdison.
8 IRG Clusters

The AMS module provides the ability to manage and create IRG (Integrated Review Group) clusters, committees and SEPs for a given IC.

The User Administration (UADM) module can also be accessed to manage IRG clusters, but that is the only functionality in UADM.

**NOTE:** This feature is only accessible for the IRG CLUSTER SECURITY ROLE. Any of the three roles, UADM QUERY ROLE, UADM USER ROLE, UADM ADMIN ROLE must exist in addition to IRG CLUSTER SECURITY ROLE on the user account to maintain IRG clusters.

Please refer to one of the topics below for more information:

- Manage IRG Clusters
- Create IRG Clusters
- Create New Super Clusters

### 8.1 Manage IRG Clusters

1. Click the Manage IRG Clusters tab to access the Manage IRG Clusters screen.

![AMS Tabs Displaying the Manage IRG Clusters Tab](image)

The Manage IRG Clusters screen displays. The user’s Institute name is shown on the top of the screen. If there are multiple assigned IC mapped accounts, then all ICs are displayed in the drop down list.
2. To obtain all clusters for an IC, select the IC from the pull down menu.
   a. Click on the **Get Clusters** button.

The system displays all the existing clusters for the selected IC in ascending order based on the cluster code. See the above screen print.

3. To delete an IRG Cluster Component, select the appropriate check box and click the **Delete** button.

When the **Delete** button is clicked, the system displays the following prompt message: *Are you sure you want to delete the selected cluster(s)? All cluster components will be deleted as well.*

If the system determines that the IRG Cluster being deleted is assigned to one or more accounts, then the following pop-up prompt message appears: *Selected cluster(s) are assigned to existing accounts. All cluster components and their association will be removed for all accounts. Are you sure you want to delete the selected cluster(s)?*
4. To maintain an IRG Cluster, click the appropriate **Manage Clusters Components** hyperlink. See the above **Manage IRG Clusters** screen print.

The system displays the **Manage Cluster Components** screen with the appropriate information associated to the cluster and its components. The All Committees and SEPs are sorted in alphabetical order.

For more information on this screen, please refer to the **Manage Cluster Components** topic.
5. To create a new cluster or super cluster, click the \textit{Create New Cluster} or \textit{Create New Super Cluster} button.  
   a. For more information, please refer to the \textit{Create IRG Clusters} or \textit{Create New Super Cluster} topic.

\subsection*{8.2 Create IRG Clusters}

The Account Management System (AMS) provides the ability to create IRG clusters by assigning committees and SEPs for a given IC. This feature is only accessible for the IRG CLUSTER SECURITY ROLE.

The following business rules apply:

1. The system always provides the latest list of IC CMTES and SEPs.
2. The Cluster Code and the Cluster Description cannot be blank.
3. At least one component must exist for a cluster.
4. The SEP Defer must be selected for one component.
5. Required fields are asterisked. The required fields are: \textit{Cluster Code}, \textit{Cluster Description}, and \textit{Components}.

There are two different ways to access a blank \textit{Manage Cluster Components} screen to create an IRG cluster.

1. For the first way, select the \textit{Create New Cluster} button from the \textit{Manage IRG Clusters} screen.
2. The second way is to click on the appropriate **Manage Components** hyperlink under the **Action** column on the **Manage IRG Clusters** screen.

**NOTE:** This hyperlink should be used when editing existing cluster components.

![Manage IRG Clusters Screen Displaying Manage Cluster Components Hyperlinks](image)

**Figure 103:** Manage IRG Clusters Screen Displaying Manage Cluster Components Hyperlinks

The system displays the appropriate **Manage Cluster Components** screen completed with the existing cluster and its components information.

3. Click the **Create New** button.
For either way, the system displays a blank *Manage Cluster Components* screen. The system always provides the latest list of IC Committees (CMTES) and SEPs sorted alphabetically.

For more information on this screen, please refer to the *Manage Cluster Components* topic.
8.3 Create New Super Cluster

Super Cluster allow Internet Assisted Review (IAR) and Peer Review (REV) users to access most of the meetings as long as the meeting’s cluster is within the Super Cluster.

When the Create New Super Cluster button is clicked on the Manage IRG Clusters screen, the Manage Super Cluster screen displays.

**NOTE:** Required fields are noted by a red asterisk.
Figure 106: Manage Super Cluster Screen

1. Complete the appropriate information.
2. Perform one of the following options:
   a. Click the **Save** button to save the changes.
   b. Click the **Clear** button to clear out the data.

When the **Save** button is clicked, the system displays the following message: *Super Cluster has been successfully created.*
When the Clear button is clicked a warning pop-up message appears. The warning message is: 
Are you sure you want to leave this page? You have unsaved changes.
3. Perform one of the following options:
   a. Click the **Leave this Page** button to cancel the changes.
   b. Click the **Stay on this Page** button to continue editing.

4. To create another Super Cluster, click the **Create New** button and repeat the steps above.

### 8.4 Manage Cluster Components

1. To add an IC Committee to the Components, select the appropriate check box and click the **Add** button.

![All IC Committees:](image)

*Figure 109: All IC Committees Section on Manage Cluster Components Screen*

2. To add an IC Committee as a SEP, select the appropriate check box and click the **Add as SEP** button.
Figure 110: All IC Committees Section on Manage Cluster Components Screen

The system adds the IC Committee and/or the SEP IC Committee to the **Components** list.
3. To add a SEP, select the appropriate check box and click the **Add** button.
4. To add a SRC 99 to the Components, select the appropriate check box and click the SRC 99 button.

**NOTE:** Only one SRC 99 component can be created for a component.

5. To indicate a component at SEP Defer, select the appropriate component’s radio button. See the Components screen print.

The system adds the SEP and/or the SRC 99 to the Components list.
6. To delete an IRG Cluster Component, select the appropriate component’s check box and click on the **Delete** button.

![Components Section on Manage Cluster Components Screen](image)

**Figure 114: Components Section on Manage Cluster Components Screen**
Figure 115: Components Section on Manage Cluster Components Screen

7. To save the changes, click the **Save** button.

The system displays the following message: *Cluster has been successfully updated.*

![Manage IRG Clusters]

**Manage Cluster Components**
- Cluster has been successfully updated

Figure 116: Manage Cluster Components Screen with Successfully Saved Message

8. To reset the changes made before saving, click the **Reset** button.

A warning pop-up message appears. The warning message is: *Are you sure you want to leave this page? You have unsaved changes.*
9. Perform one of the following options:
   1. Click the **Leave this Page** button to cancel the changes.
   2. Click the **Stay on this Page** button to continue editing.
9 User Reports

There is the ability in AMS to run reports. There is a new tab in AMS labeled AMS User Reports. When the AMS User Reports tab is clicked, the All Users Report screen displays. The following reports are available:

- **All Users Report** (default screen)
- **Deactivated Users Report**

**NOTE:** The Deactivated Users Report functionality is not available for external users.

Here is the All Users Report screen for Commons, external iEdison, and State Department users.

![Figure 118: All Users Report Screen for External Users](image)

Here is the All Users Report screen for Agency and iEdison Agency/ERL users.

**NOTE:** The **Organization(s)** field defaults to the IC the logged in user has roles with. If the logged in user has multiple ICs, the **Organization(s)** field displays a drop-down menu. For the eRA Service Desk users, the **Organization(s)** field also has an **ALL** option.
9.1 **All Users Report**

1. To run the report select or enter the appropriate search criteria.
2. Perform one of the following options:
   a. Click the **Search** button to run the report.
   b. Click the **Clear** button to clear the search criteria.

When the **Search** button is clicked, the **Search Results** are displayed. The default sort is by **User ID** in ascending order.

Here is the **All Users Report** screen for Commons, external iEdison, and State Department users.
Here is the *All Users Report* screen for Agency and iEdison Agency/ERL users.

![All Users Report Screen](image)

**Figure 121: All Users Report Screen Displaying the Search Results for Internal Users**

### 9.2 Deactivated Users Report

**NOTE:** The *Deactivated Users Report* functionality is not available for external users.

1. To run the report, click the **Deactivated Users Report** hyperlink in the left side menu.

**NOTE:** The **User Type** field defaults to *Agency* and the **Organization(s)** field defaults to the IC the logged in user has roles with. If the logged in user has multiple ICs, the **Organization(s)** field displays a drop-down menu. For the eRA Service Desk users, the **Organization(s)** field also has an *ALL* option.

![Deactivated Users Report Screen](image)

**Figure 122: Deactivated Users Report Screen**
2. Enter or use the calendar icon to set the start and end dates.
3. Click the **Search** button to execute the report.

When the **Search** button is clicked, the system displays all deactivated user accounts for the appropriate organization(s) and the dates entered. The default sort is by **User ID** in ascending order.

![Deactivated Users Report Screen](image)

*Figure 123: Deactivated Users Report Screen Displaying the Search Results*

If no dates are entered or selected, the following error messages display:

- **Missing Required Information: Deactivation Start Date**
- **Missing Required Information: Deactivation Start Date**

If a future date is selected for the end date, the following error message displays: **Invalid Date: Date should be between 01/01/1900 and today's date.**

### 9.3 Features of Both Reports

1. To filter the hit list results, type some text in the **Filter** field such as a last name.
2. To sort the hit list results, click the **up** (descending order) or **down** (ascending order) arrows in the appropriate column heading.
3. To adjust the number of records displayed, select the appropriate amount from the **Show per page** field's drop-down menu.
4. To navigate the hit list pages, select the appropriate **Page Number**, the **left double** arrows to return the first page, or the **right double** arrows to go to the end of the list.
5. To show or hide columns in the hit list, click the **Show/Hide Columns** button.

When the **Show/Hide Columns** button is clicked, a drop-down menu displays.
NOTE: The list of column names varies depending on whether the logged in user is an external or internal user.

---

Figure 124: Show/Hide Columns Drop-down Menu

6. Select the appropriate column or columns to show/hide.

The system immediately removes or adds the column into the hit list. When a column is selected with a blue background, the blue background changes to white which means that the column is removed from the hit list and vice-versa.

7. To export the hit list, click the Export button.

When the Export button is clicked, a drop-down menu displays.

---

Figure 125: Export Column Drop-down Menu

8. Select the appropriate option (Copy, Excel, CSV, PDF, and Print).

If the Print option is selected, the appropriate report displays along with a Print dialog box.
NOTE: The list of column names varies depending on whether the logged in user is an external or internal user.

<table>
<thead>
<tr>
<th>User ID</th>
<th>Name</th>
<th>Primary Org</th>
<th>Secondary Org</th>
<th>Account Deactivation Date</th>
<th>Deactivated By</th>
</tr>
</thead>
<tbody>
<tr>
<td>POTTERH</td>
<td>Potter, Harry</td>
<td>CA - National Cancer Institute</td>
<td></td>
<td>2016-03-01</td>
<td>IMPACR8</td>
</tr>
<tr>
<td>SNAPEP</td>
<td>Snape, Professor</td>
<td>CA - National Cancer Institute</td>
<td></td>
<td>2016-05-02</td>
<td>IMPACR8</td>
</tr>
</tbody>
</table>

*Figure 126: AMS Reports - Deactivated Users Reports Screen for Print Option*
10 eMail Notifications

There is an automated nightly job that checks the date an internal NIH user last accessed an eRA module. The following processing applies:

1. If the user has not been logged into an eRA module for 120 days, then the account status is set to *Inactive*.
2. If the user account was created more than 120 days before and the user has never logged in, then that user account’s status is set to *Inactive*.

The following Notifications are sent to notify the appropriate user:

- Reminder Notice – sent 28 days, 14 days, and every day for the 10 days prior to deactivation
- Notice of Deactivation – when the user account is deactivated
11 Logging Out of Account Management System (AMS)

To log out of the Account Management System (AMS), click the **Logout** button at the top right corner of the any main Manage Accounts screens.

![Logout Button](image)

*Figure 127: Logout Button*
12 Error Messages

12.1 Search Account Error Messages

<table>
<thead>
<tr>
<th>Condition</th>
<th>Error Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>No records are found</td>
<td>No results match the provided search criteria. Here are several error resolution suggestions. Try to broaden your search by adding more search parameters. Create an account.</td>
</tr>
<tr>
<td>Search results exceed 500 records</td>
<td>Maximum number of 500 results exceeded. Please try to limit your search by adding more search parameters.</td>
</tr>
<tr>
<td>Data is not entered in one additional field besides User Type</td>
<td>You must enter at least one search field, in addition to User Type.</td>
</tr>
<tr>
<td>Only one character is provided in the Last Name field</td>
<td>Last name should be 2 or more characters long.</td>
</tr>
<tr>
<td>Less than 3 characters are entered in the User ID field</td>
<td>User ID, should be 3 or more characters long.</td>
</tr>
</tbody>
</table>

Table 2: Search Account Error Messages

12.2 Validate Certificate Errors

<table>
<thead>
<tr>
<th>Condition</th>
<th>Error Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>The browser call did not go through to the certificate provider</td>
<td>The appropriate browser error is displayed.</td>
</tr>
<tr>
<td>The browser call does go through to the certificate provider, but the mapping does not exist.</td>
<td>Validation is successful but certificate mapping does not exist for the user.</td>
</tr>
<tr>
<td>The browser call does go through to the certificate provider, but the mapping is incorrect.</td>
<td>Validation is successful but the certificate mapping does not match the user entered details.</td>
</tr>
</tbody>
</table>

Table 3: Validate Certificate Screen Errors
### 12.3 Create Account Errors

<table>
<thead>
<tr>
<th>Condition</th>
<th>Error Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>An attempt to create a FACTS account without the appropriate privileges.</td>
<td>You do not have sufficient privileges to grant (FACTS_SDC_MGR_ROLE) to this organization (United States).</td>
</tr>
</tbody>
</table>

*Table 4: Create Account Errors*