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Office of Extramural Research

Account Management System (AMS) User Guide

System Version 2.9.1.13

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CONTACT US

Document Comments:

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How are we doing? The Communications & Documentation Team of the electronic Research Administration (eRA) is dedicated to serving our community and welcomes your feedback to assist us in improving our user guides. Please send comments about the user guide to this address: eRACommunications@mail.nih.gov.

Troubleshooting support:

Please contact the eRA Help Desk:

Toll-free: 1-866-504-9552

Phone: 301-402-7469

TTY: 301-451-5939

Web:http://grants.nih.gov/support (Preferred method of contact for **external** users)

Web:https://inside.era.nih.gov/eRA_helpdesk.cfm (Preferred method of contact for **internal** users)

Email:commons@od.nih.gov (for Commons Support)

Email:helpdesk@od.nih.gov (for IMPAC II Support)

Hours: Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

DISCLAIMER STATEMENT

No data shown in illustrations represents any real account, project, or individual. Any resemblance to actual accounts, projects, or individuals is purely coincidental.

DOCUMENT HISTORY

Date	System Version	Document Version	Description of Change
1/22/2016	1.0.0.0	1.0.0	Created brand new user guide from online help files
3/25/2016	2.01.04.0	1.1.0	See release notes - external users and see release notes - internal users
6/27/2016	2.5.1.3	1.1.1	IC Coordinators can now view and replace an account's Account Request Form
8/19/2016	2.7.1.13	1.2.0	Search for and reactivate accounts that have been locked due to inactivity. Updated reporting functionality
9/19/2016	2.8.1.0	1.3	The Create Account screen now lets NIH/Agency administrators search the NED system to find user profiles in their organizations.
11/17/2016	2.9.8.13	1.3.1	Removes all roles associated with an account when the account is deactivated. Allows IC Coordinators to re-certify active accounts to prevent the account holder from getting locked out. llows eRA Service Desk Agents to reactivate users and add mapping if no mapping exists.
12/22/2016	2.9.8.13	1.3.2	When you unlock an account, the user receives a notification saying that he or she has to login to the account on that same day or the account will be relocked. eRA Service Desk agents can click the Add Roles to Other org button to give a system account roles in another organization. Added instructions for verifying a new Commons account when you receive a Notification of New Account from eRA

The most current version of this document will be available on the eRA website: 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 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

2.1.1 External Agency Management Staff

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

1. To access the AMS *Login* screen click here.

The Commons *Login* screen opens.

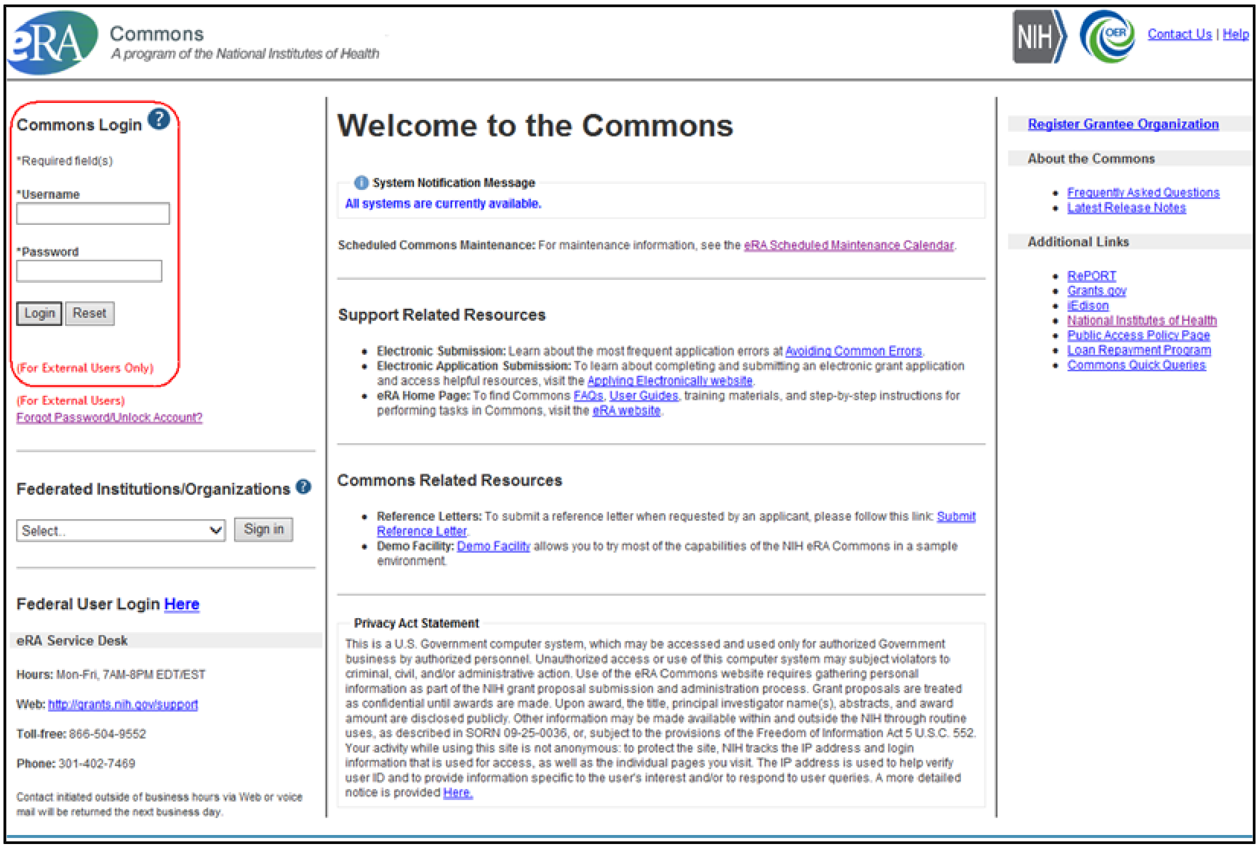


Figure 1: Commons Login Screen

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

After successfully logging into the AMS, the system displays the *Search Accounts* screen.

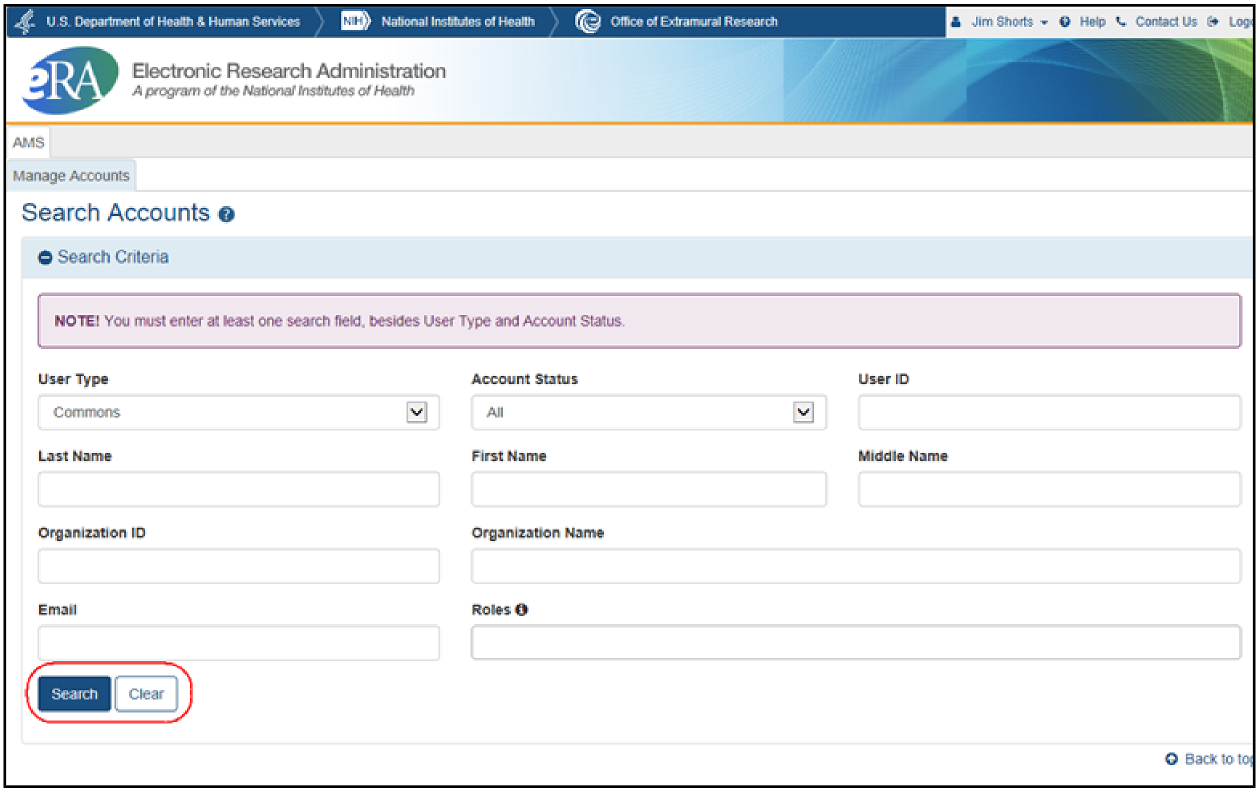


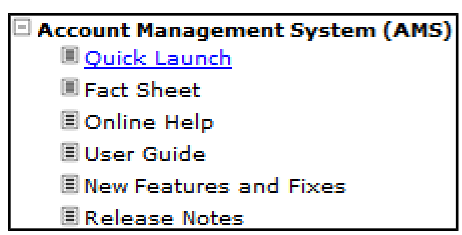
Figure 2: Search Accounts Screen for External Agency Users

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

2.1.2 Internal Agency Management Staff

Access the Account Management System (AMS) from the eRA Intranet.

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



When you click **Quick Launch**, the NIH *Login* screen opens,.

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.

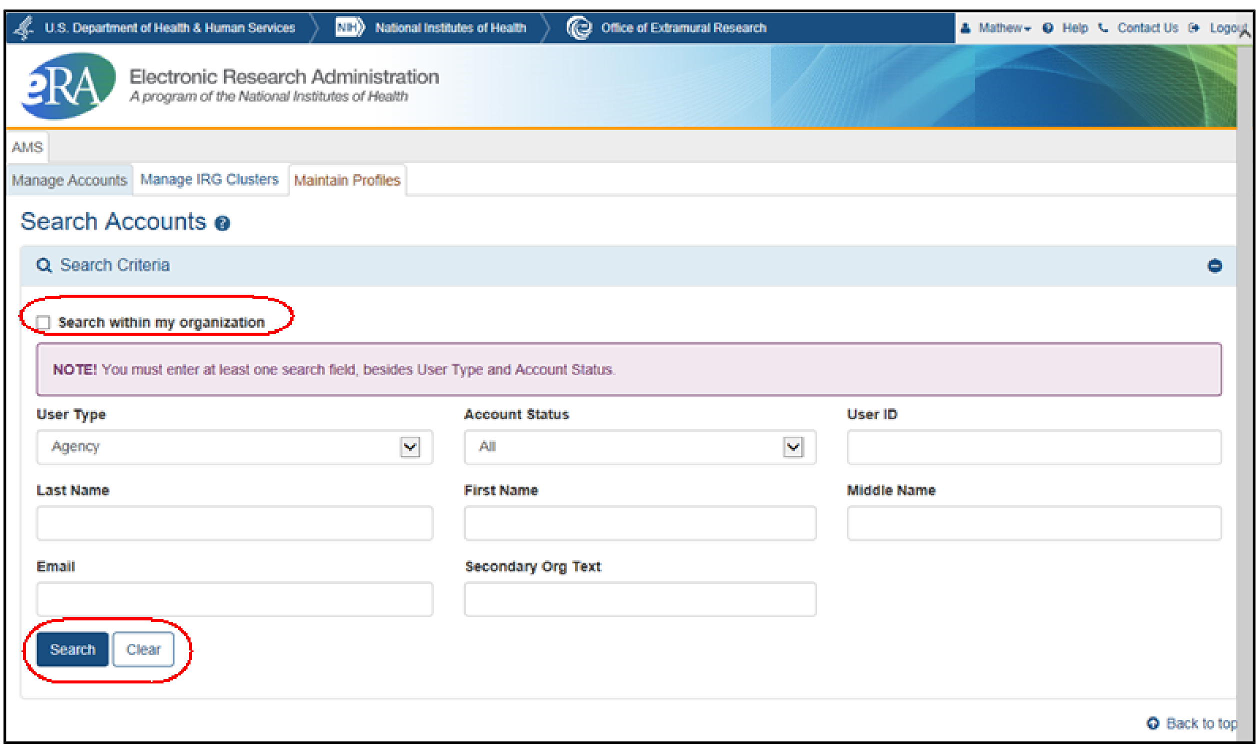


Figure 4: Search Accounts Screen for Internal Agency Users

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.

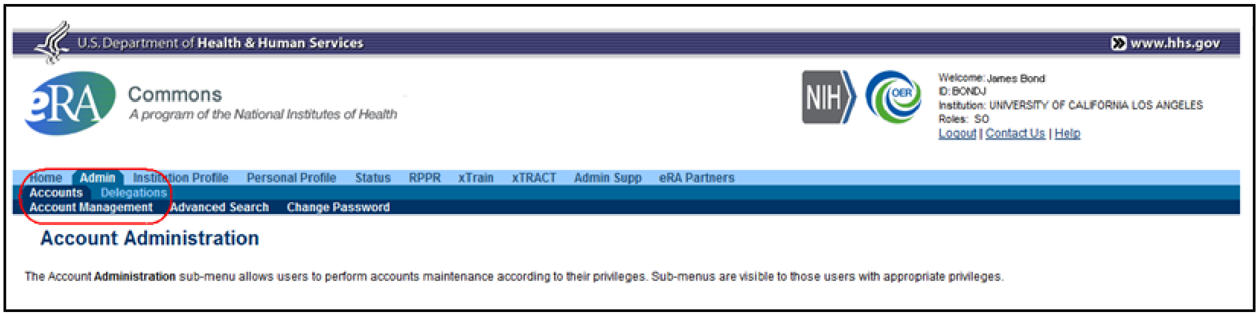


Figure 5: Commons Menu Tabs

When the **Account Management** tab is clicked, the system displays the *Search Accounts* screen (default screen) .

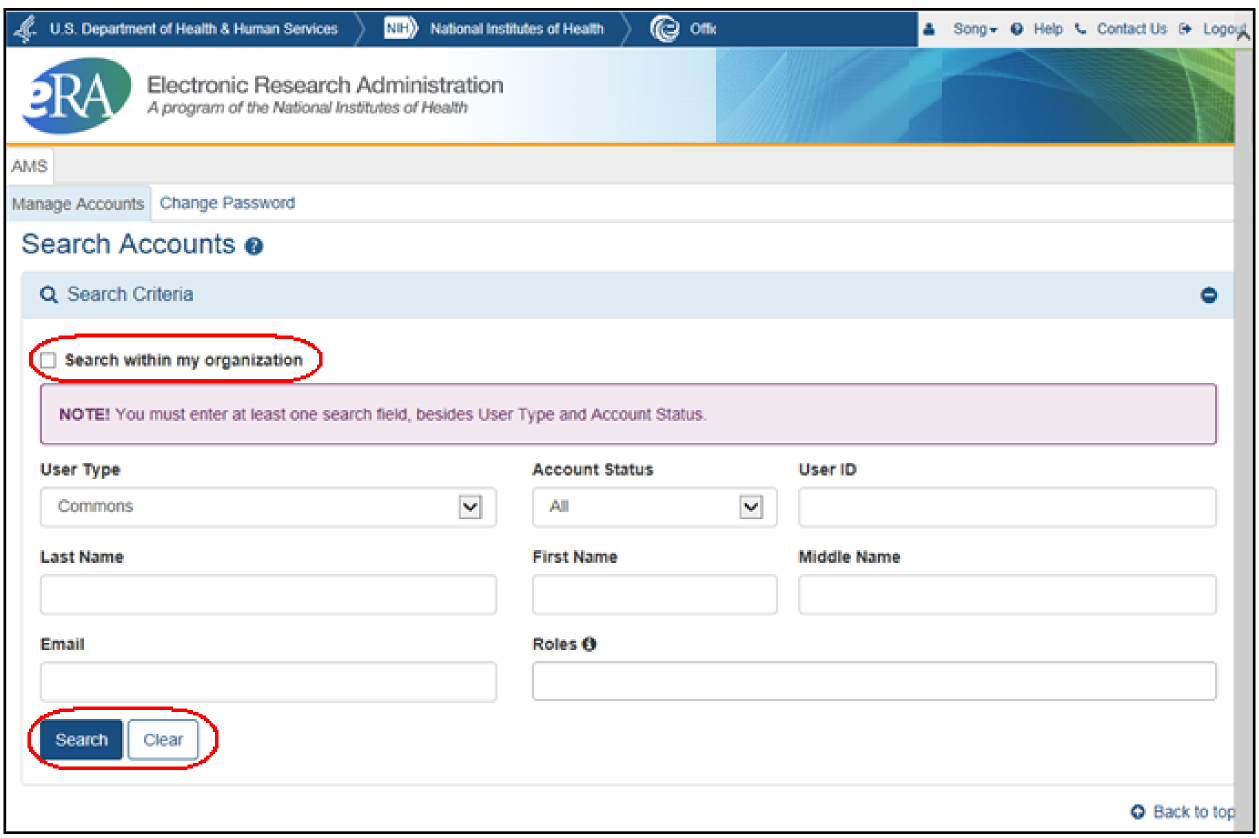


Figure 6: Search Accounts Screen for External Commons Users

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

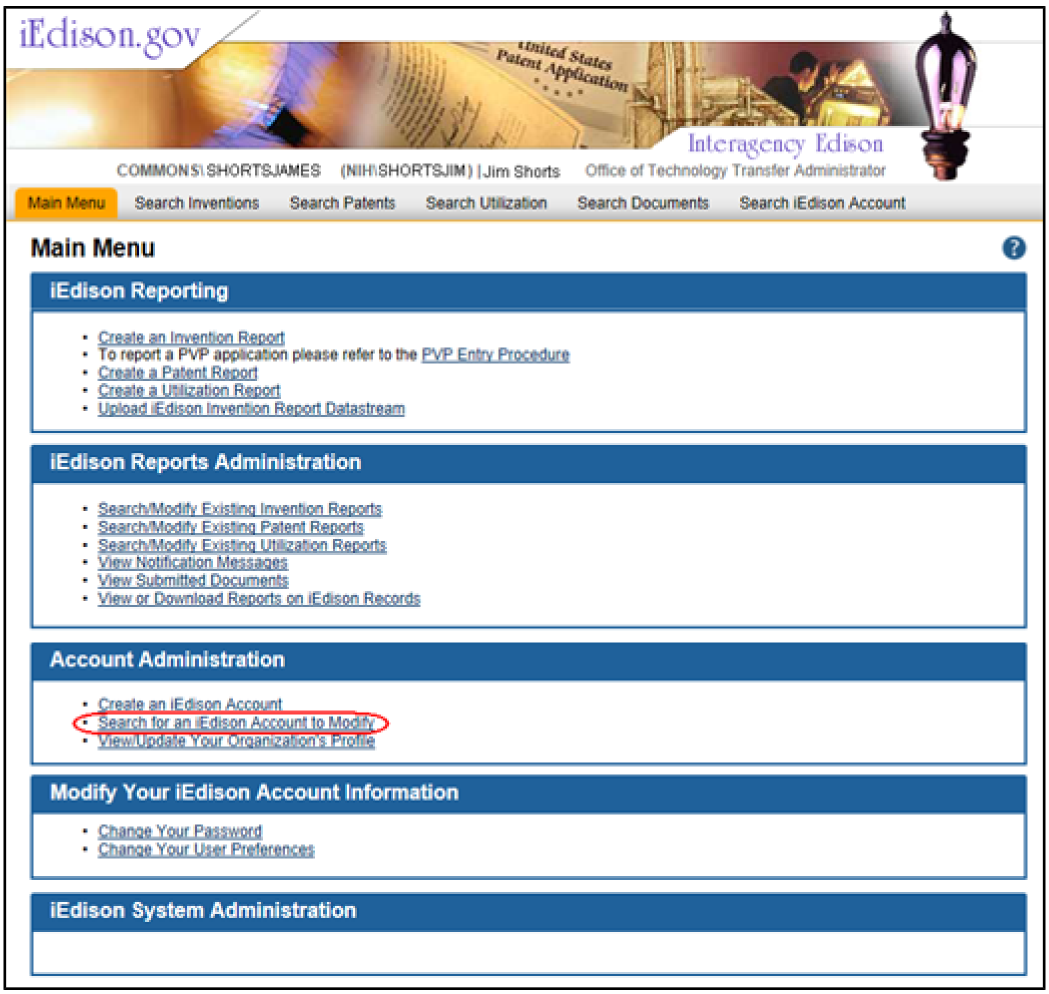


Figure 7: iEdison Main Menu Screen for External and Agency Users

iEdison ERL Users

Figure 8: iEdison Main Menu Screen for 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.

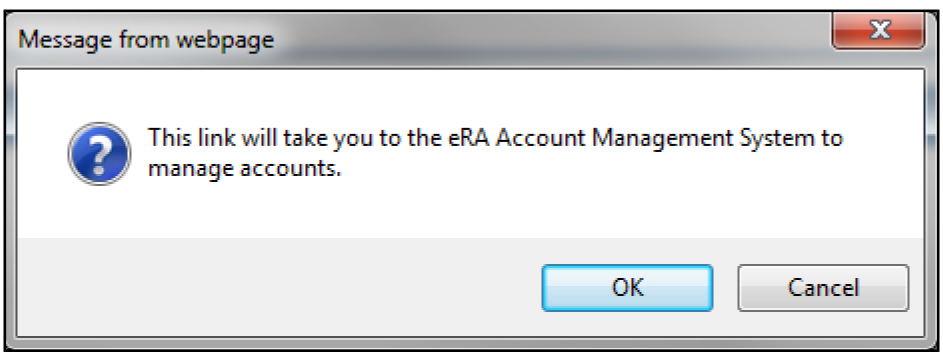


Figure 9: Accessing AMS Pop-up Screen

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

External iEdison Users

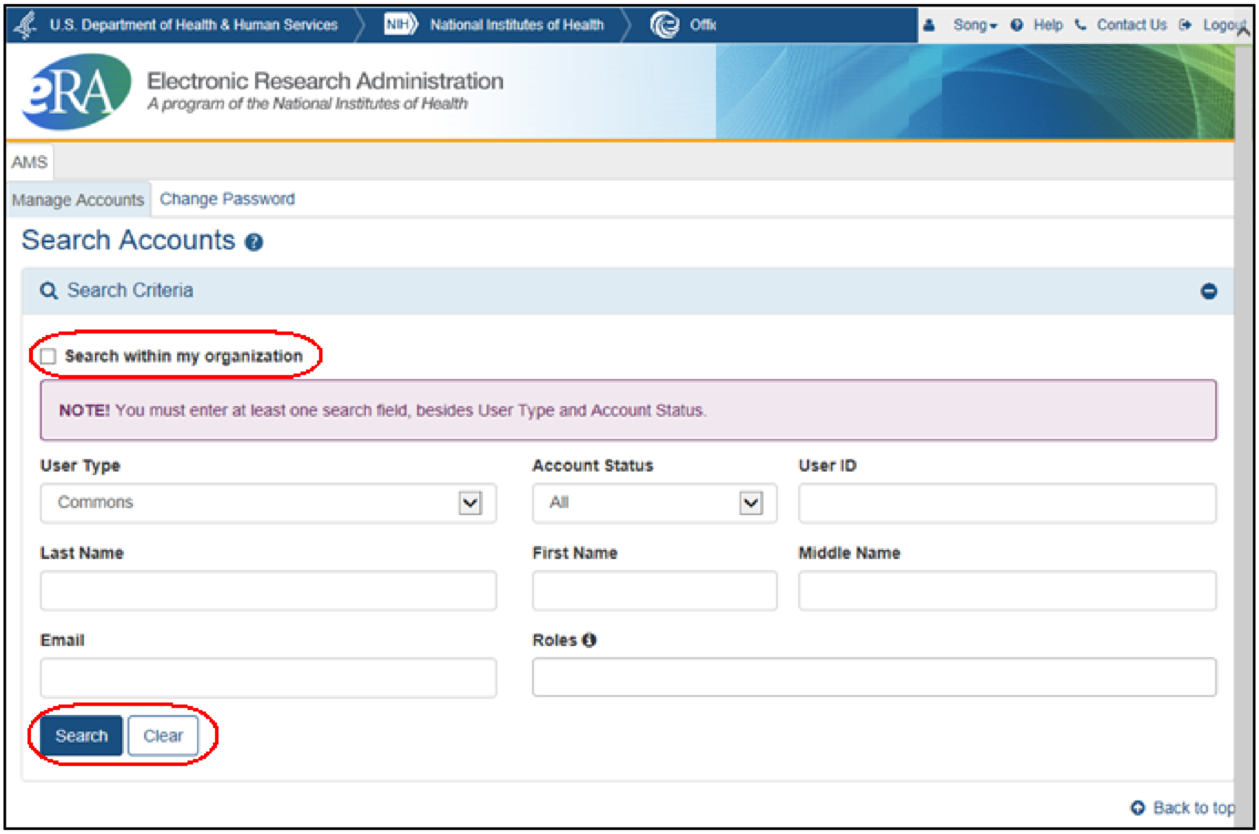


Figure 10: Search Accounts Screen for External and Agency iEdison Users

iEdison Agency and ERL Users

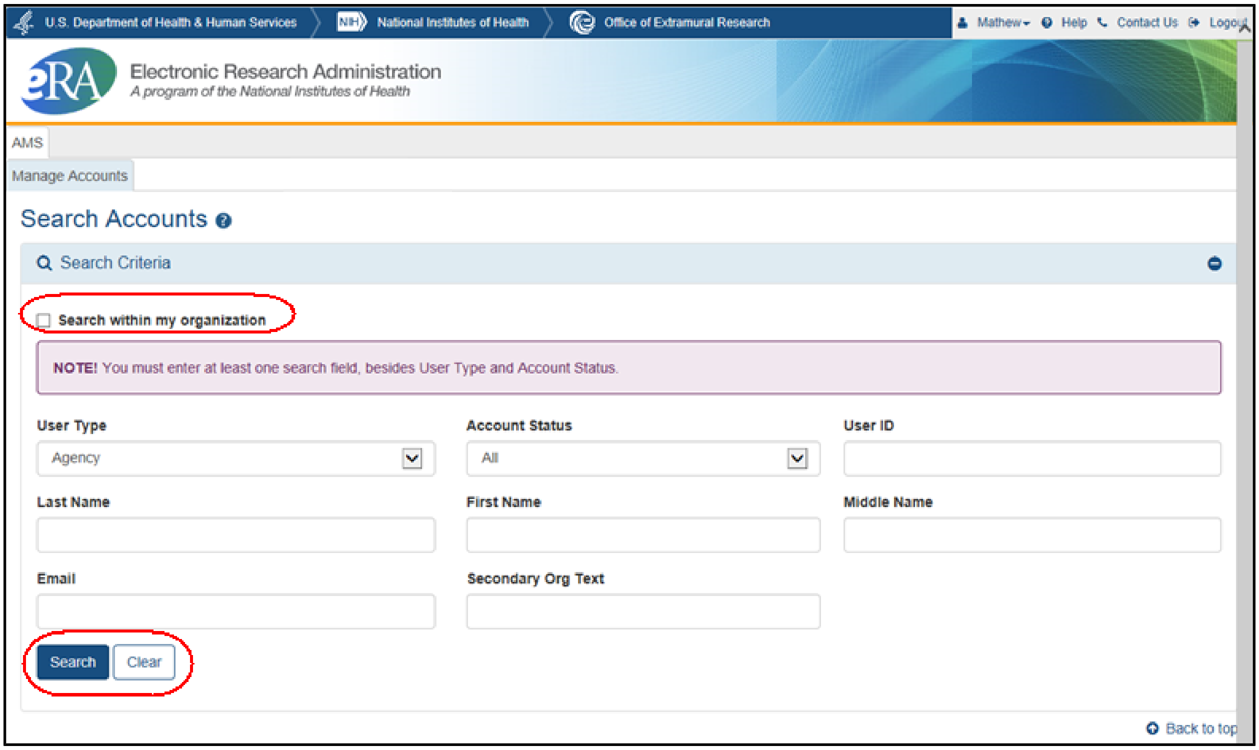


Figure 11: Search Accounts Screen for iEdison ERL Users

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.

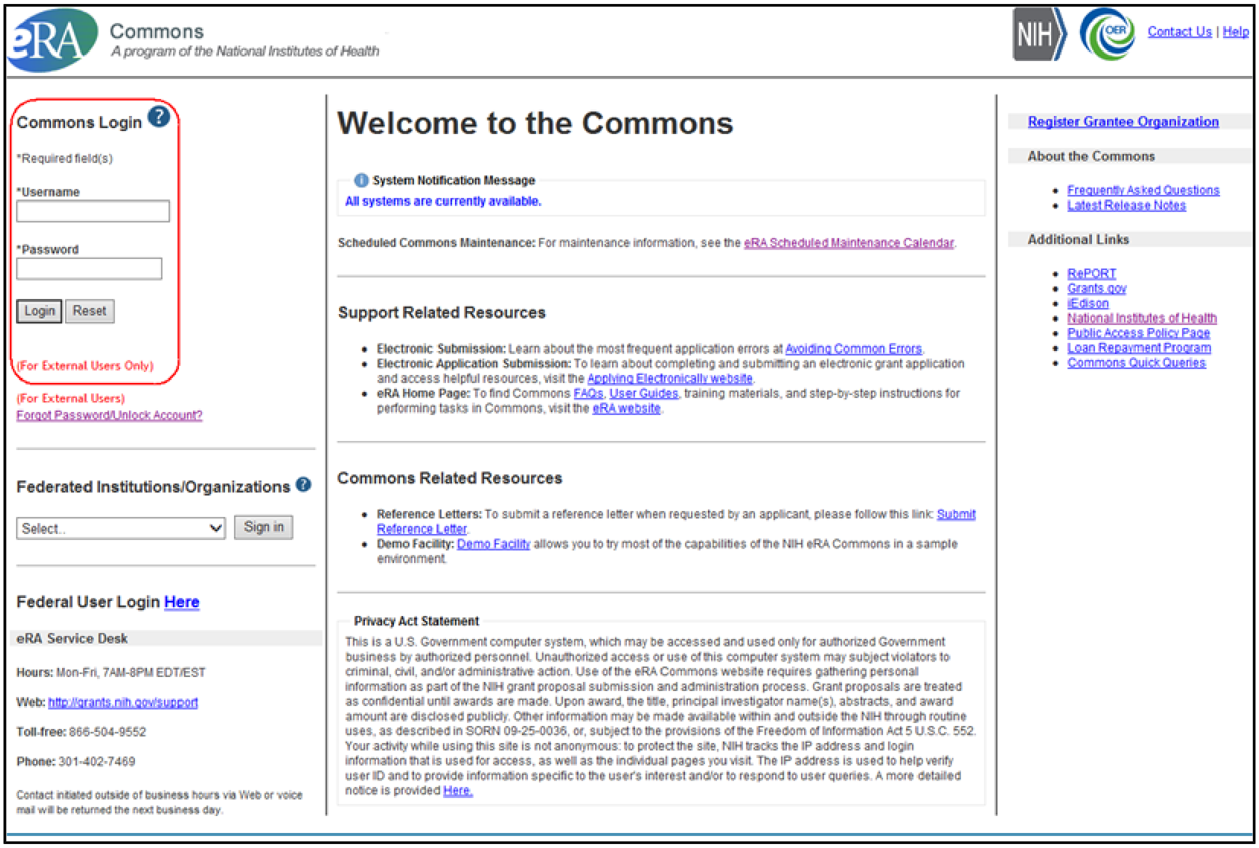


Figure 12: Login Screen for State Department Users

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*.

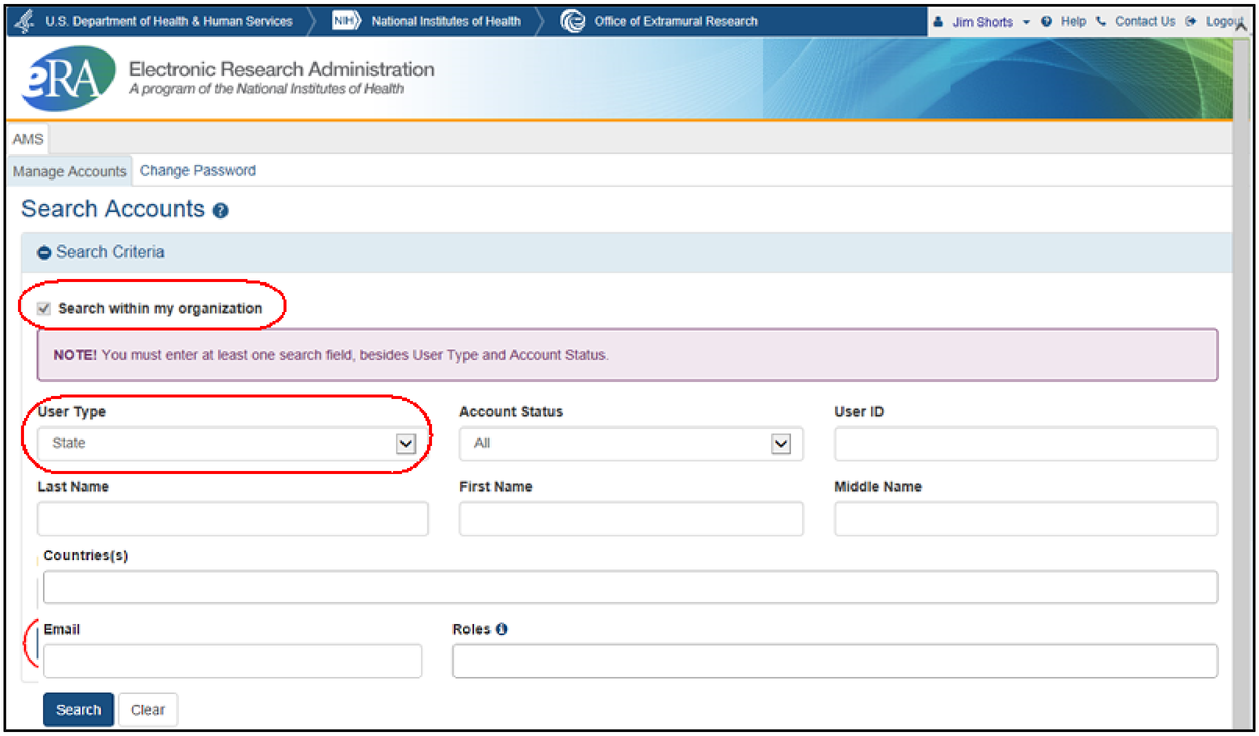


Figure 13: Search Accounts Screen for State Department Users

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)

AMS user accounts can have the following statuses:

- Active — A valid account in good standing.
- *Deactivated* — Account has been disabled by an administrator
- *Locked due to inactivity* — Locked by the system due to inactivity (no user activity for 120 days).
- *Pending Affiliation* —
- *Profile Only* — An individual account that has not been linked to an organization.

4 Search Account

4.1 User Accounts

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

There are various account statuses:

- *Active* - A working user account with a role for the appropriate system exists with a user profile.
- *Pending* - An Agency or Commons account whose owner 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
- *Deactivated* - An account that has been deactivated due to inactivity.

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).

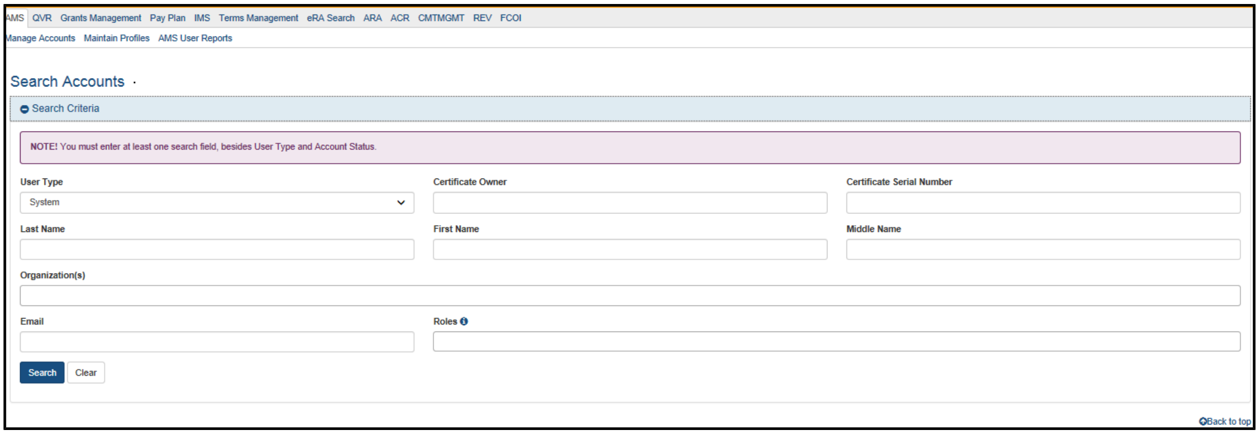


Figure 14: Search Accounts Screen for Agency Users

NOTE: You must enter something at least one search field besides **User Type** and **Account Status**.
You can us\e the percent sign (%) as a Wild card character to search for a string of characters.

1. Enter some search criteria in at least one of the other search fields.
2. Click **Search** to execute the search or click **Clear** to clear the search criteria.

See Agency and iEdison Agency/ERL User Account Search Results for information on search results.

NOTE: If you have privileges to work with system accounts and you select **User Type** *System*, then the **Search within my organization** check box is automatically checked. For more information refer to the Search for System Accounts topic.

4.3.1.1 Search Options

Search by Role

To search by role, select a role from the Roles drop-down menu (to select multiple roles, hold the **<Ctrl>** key as you click the 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 your user role.

Search by Status

You can search by status to locate accounts that have been deactivated (by an administrator or due to inactivity). To do so, select the appropriate status from the **Account Status** drop-down menu:

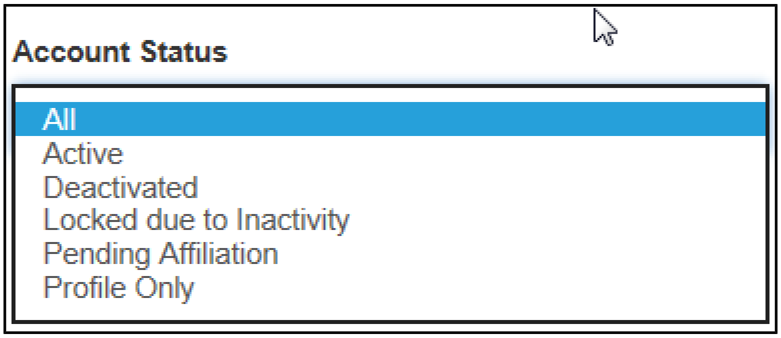


Figure 15: Account Status drop-down menu

NOTE: The full list of account statuses is only visible to users with certain user roles. Depending on your user role, you may see a different version of this menu.

The status *Deactivated* indicates that the account has been disabled by an administrator, while the status *Locked due to inactivity* is applied to accounts that have had no activity for 120 days. Make your selection and click **Search** to proceed.

For information on reactivating an account, see Reactivate or Unlock Account.

4.3.1.2 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**.

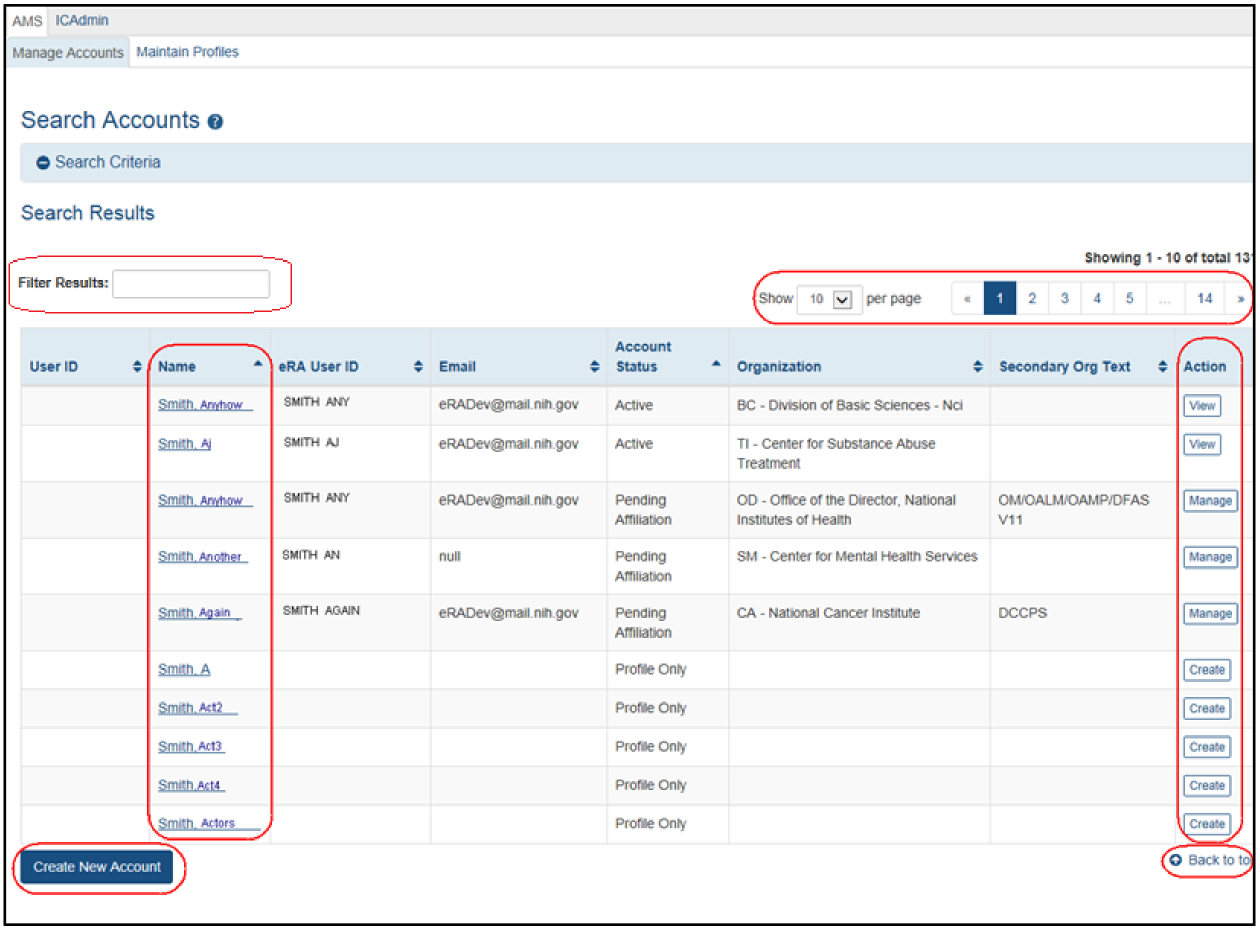


Figure 16: Search Accounts Screen Displaying Search Results

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 Results:** 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 Results:** 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 *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).

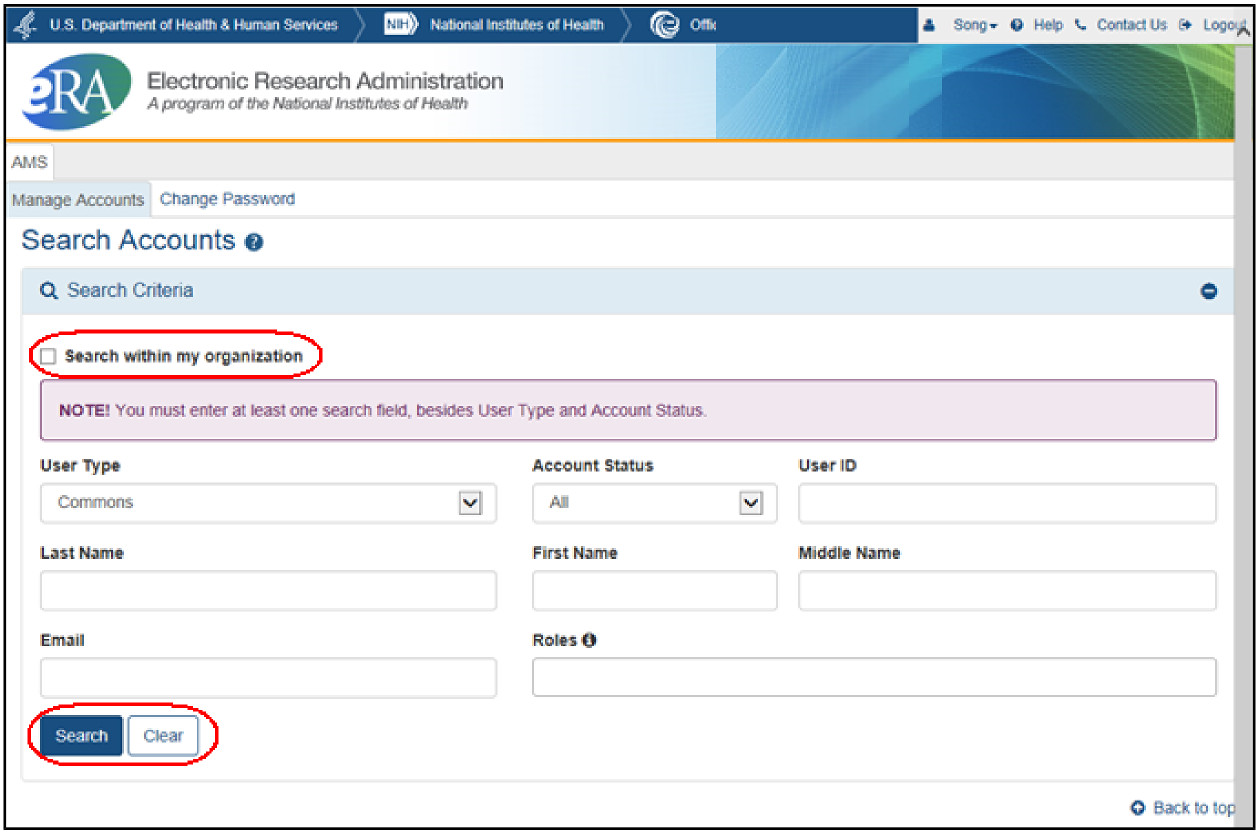


Figure 17: Search Accounts Screen for External Users

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. Click the **Search** button to execute the search or click **Clear** to clear the search.
3. The system returns the search results. For more information see Commons User Account Search Results.

   For information on Search error messages, see Error Messages.

4.3.2.1 Search Options

Search by Role

To search by role, select a role from the Roles drop-down menu (to select multiple roles, hold the **<Ctrl>** key as you click the 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.

Search by Status

You can search by status to locate accounts that have been deactivated. To do so, select the appropriate status from the **Account Status** drop-down menu:

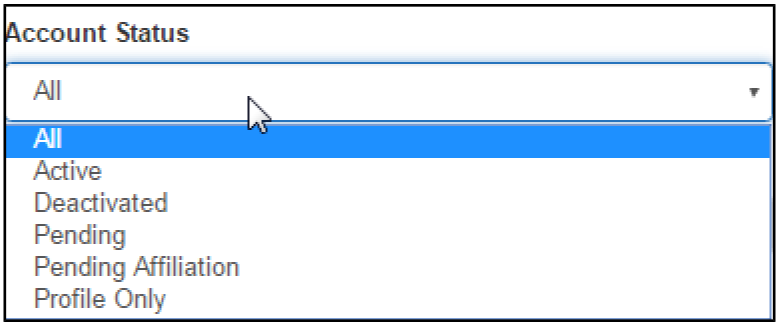


Figure 18: Account Status drop-down menu

NOTE: The full list of account statuses is only visible to users with certain user roles. Depending on your user role, you may see a different version of this menu.

For information on reactivating a deactivated account, see Reactivate or Unlock Account.

4.3.2.2 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.

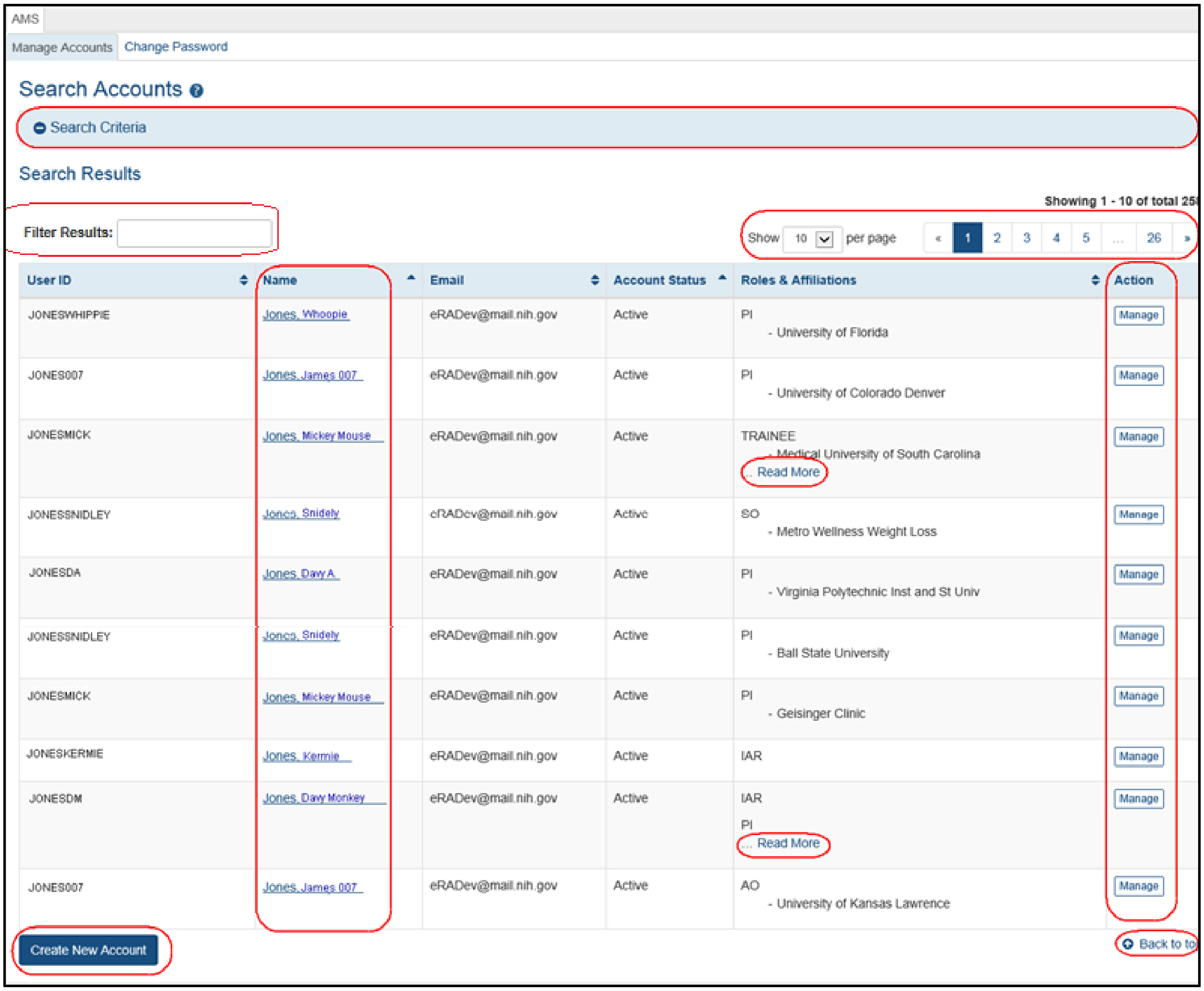


Figure 19: Search Accounts Screen Displaying Search Results

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 Results:** 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 Results:** 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 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*.

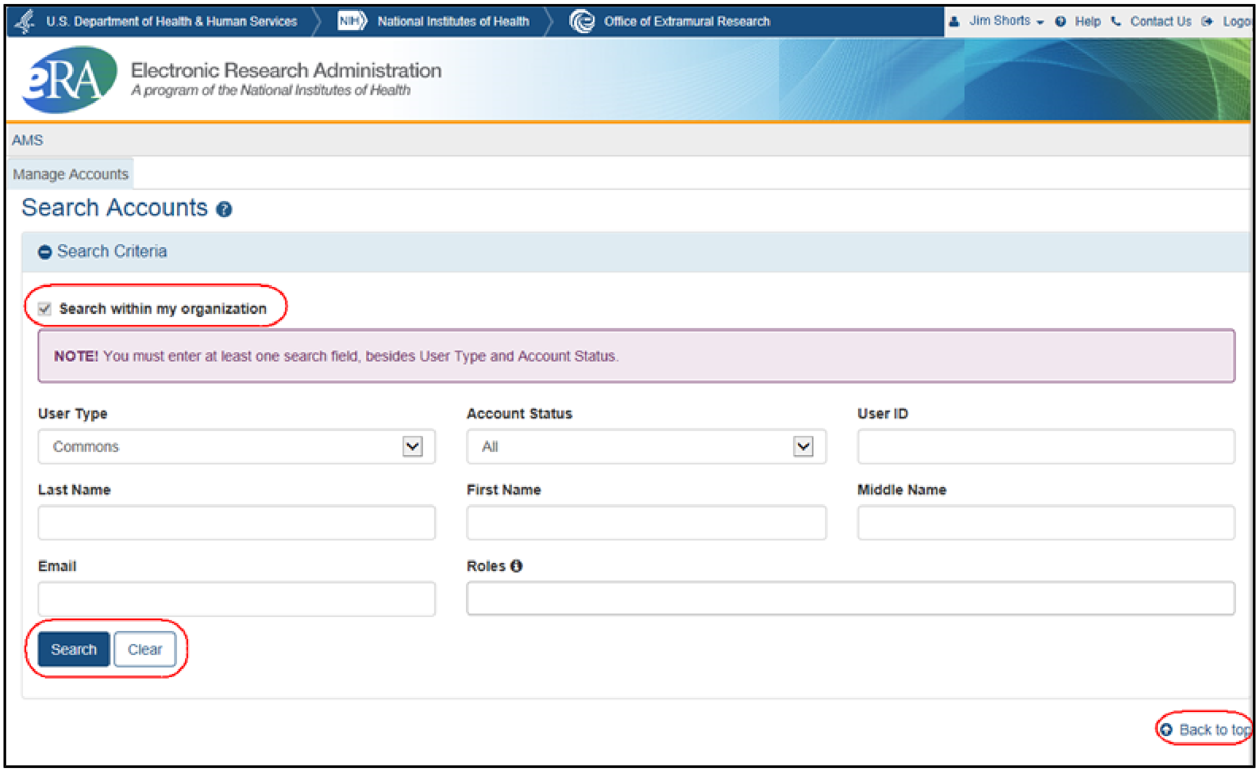


Figure 20: Search Accounts Screen for iEdison External Users

Agency and ERL iEdison User

Here is the *Search Accounts* screen for iEdison Agency/ERL users.

NOTE: For Agency/ERL users the **User Type** is *Agency*.

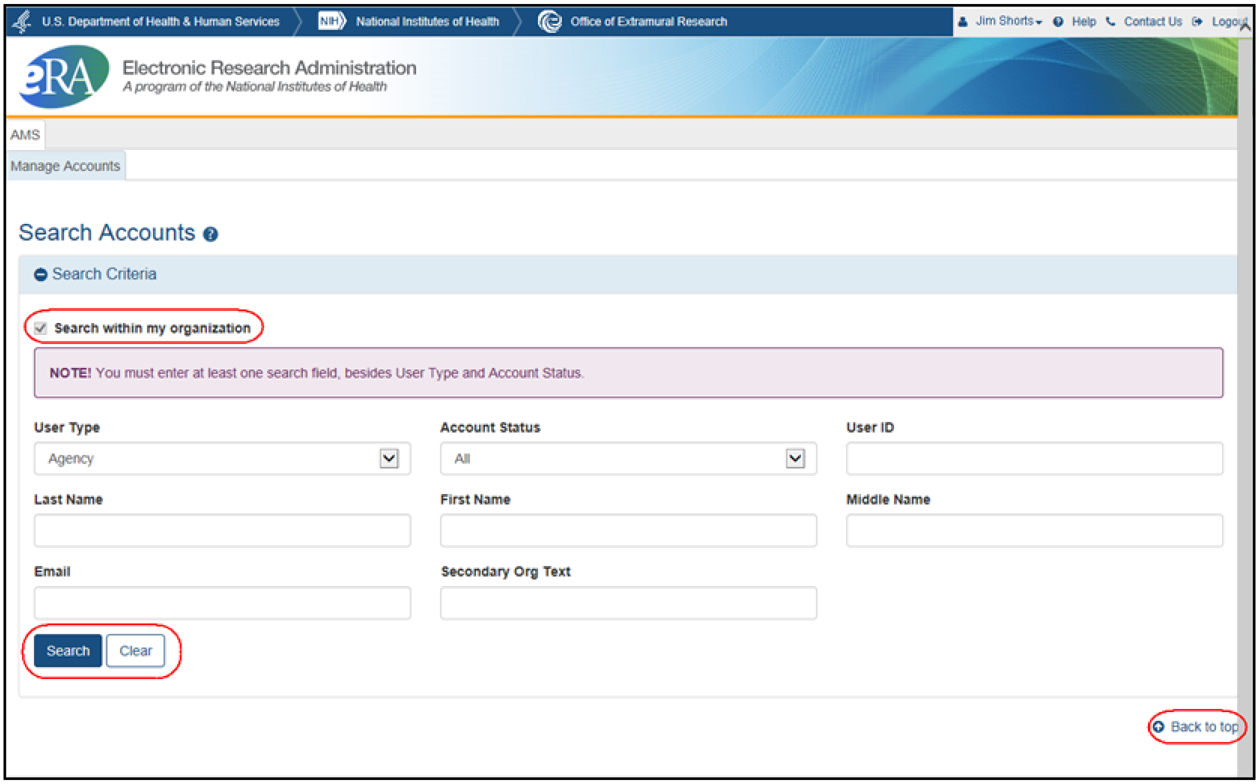


Figure 21: Search Accounts Screen for iEdison Agency/ERL Users

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 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**.

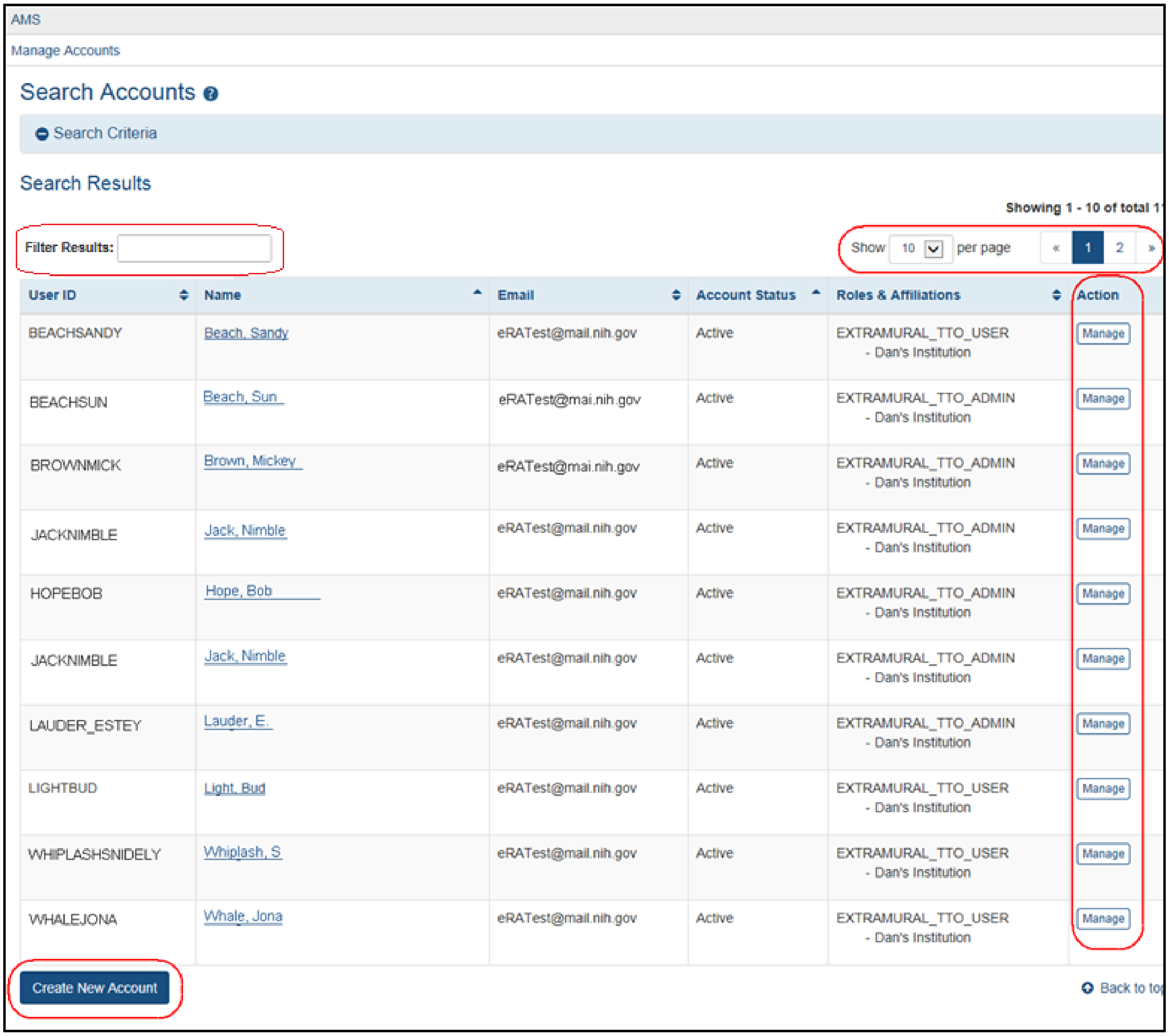


Figure 22: Search Accounts Screen Displaying External iEdison Search Results

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*.

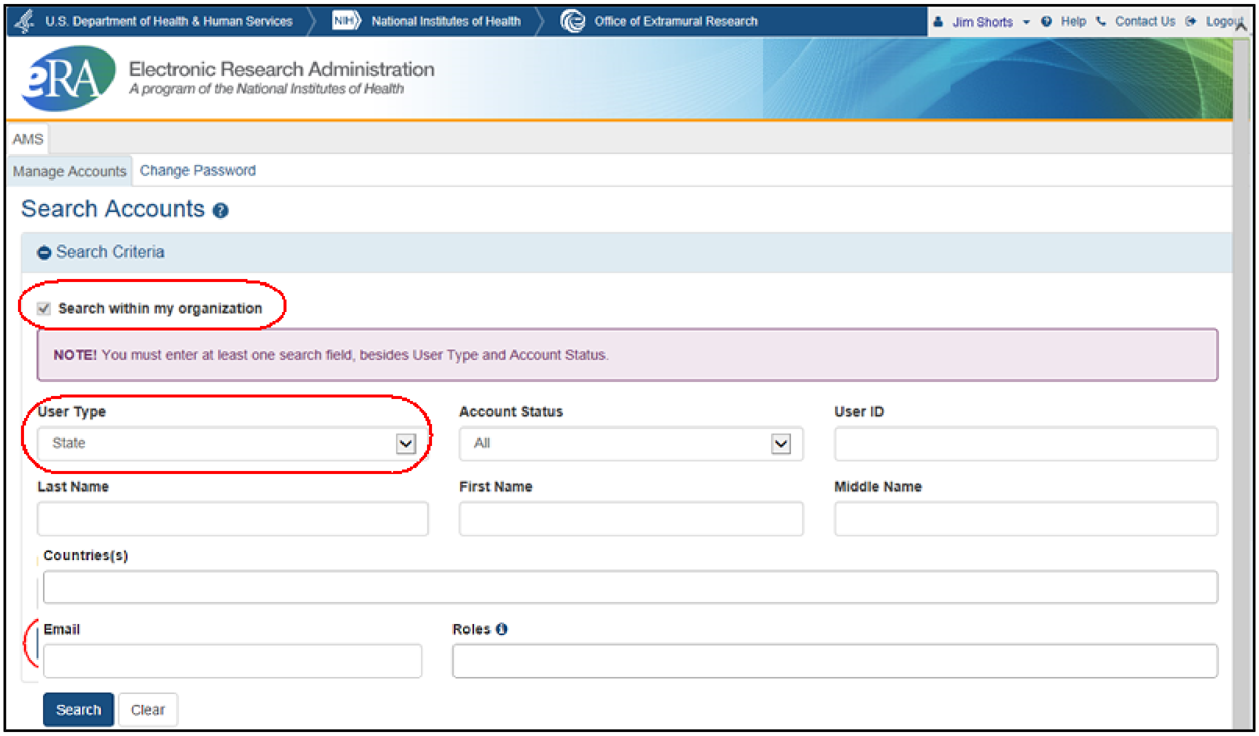


Figure 23: Search Accounts Screen for State Department Users

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. 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**.

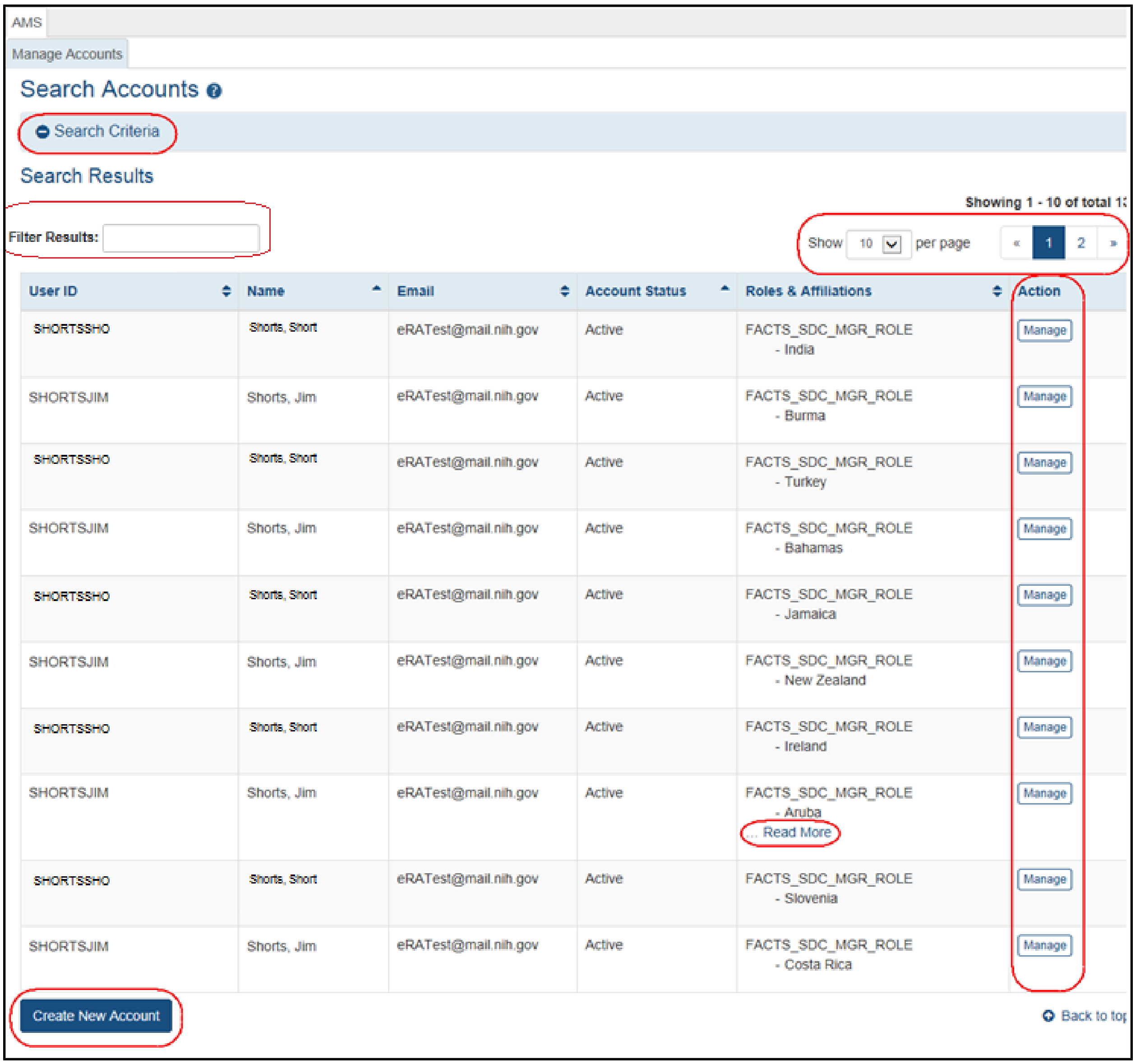


Figure 24: Search Accounts Screen Displaying State Department Search Results

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.

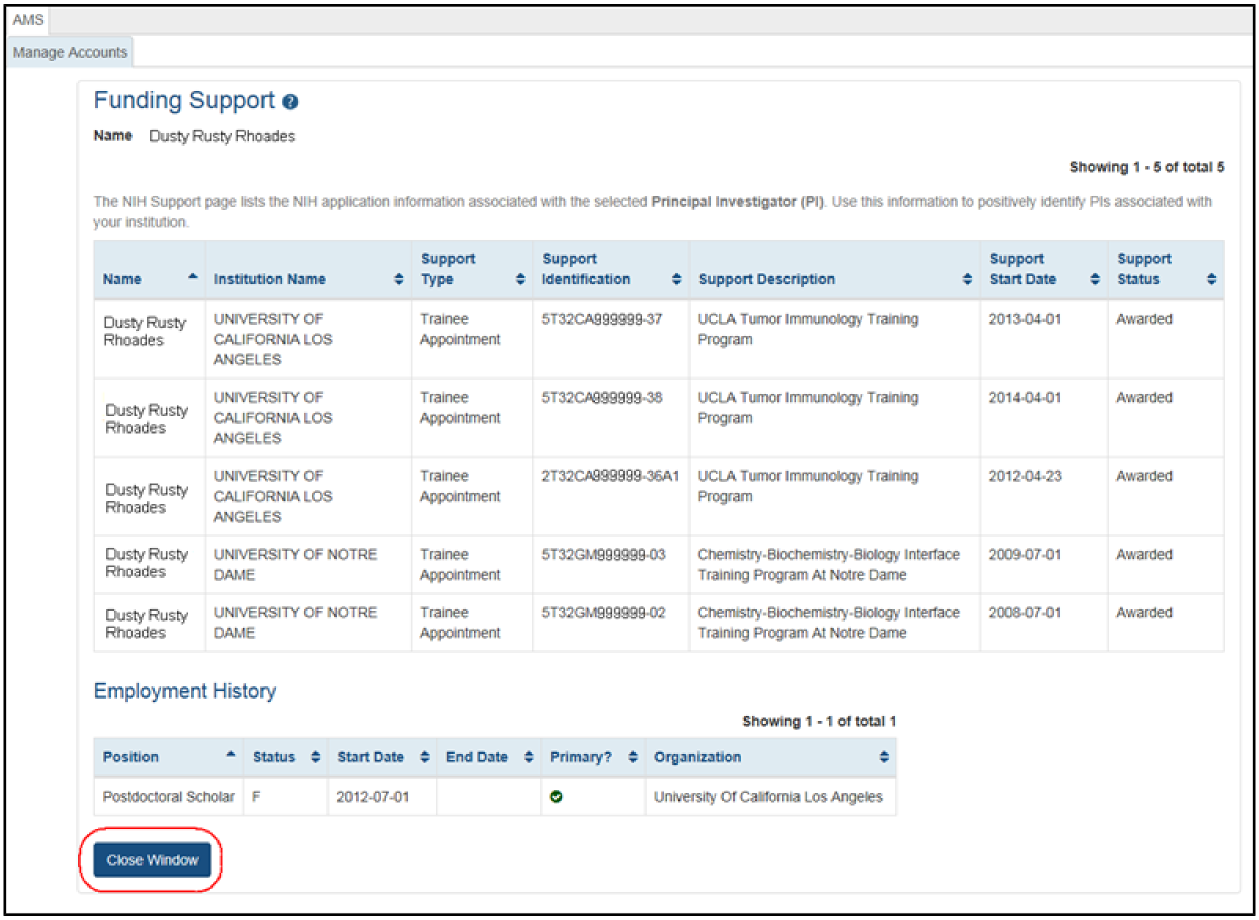
3. To change the number of records per page, select the appropriate number in the **Show per page** column.
4. To navigate between pages, perform one of the following options:
    a. Click the appropriate **Page Number** button.
    b. Click the **right double arrows** button to go to the end of the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



AMS

Manage Accounts

Funding Support

Name Dusty Rusty Rhoades

Showing 1 - 5 of total 5

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

Name	Institution Name	Support Type	Support Identification	Support Description	Support Start Date	Support Status
Dusty Rusty Rhoades	UNIVERSITY OF CALIFORNIA LOS ANGELES	Trainee Appointment	5T32CA999999-37	UCLA Tumor Immunology Training Program	2013-04-01	Awarded
Dusty Rusty Rhoades	UNIVERSITY OF CALIFORNIA LOS ANGELES	Trainee Appointment	5T32CA999999-38	UCLA Tumor Immunology Training Program	2014-04-01	Awarded
Dusty Rusty Rhoades	UNIVERSITY OF CALIFORNIA LOS ANGELES	Trainee Appointment	2T32CA999999-36A1	UCLA Tumor Immunology Training Program	2012-04-23	Awarded
Dusty Rusty Rhoades	UNIVERSITY OF NOTRE DAME	Trainee Appointment	5T32GM999999-03	Chemistry-Biochemistry-Biology Interface Training Program At Notre Dame	2009-07-01	Awarded
Dusty Rusty Rhoades	UNIVERSITY OF NOTRE DAME	Trainee Appointment	5T32GM999999-02	Chemistry-Biochemistry-Biology Interface Training Program At Notre Dame	2008-07-01	Awarded

Employment History

Showing 1 - 1 of total 1

Position	Status	Start Date	End Date	Primary?	Organization
Postdoctoral Scholar	F	2012-07-01		✔	University Of California Los Angeles

Close Window

Figure 25: Funding Support Screen

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.

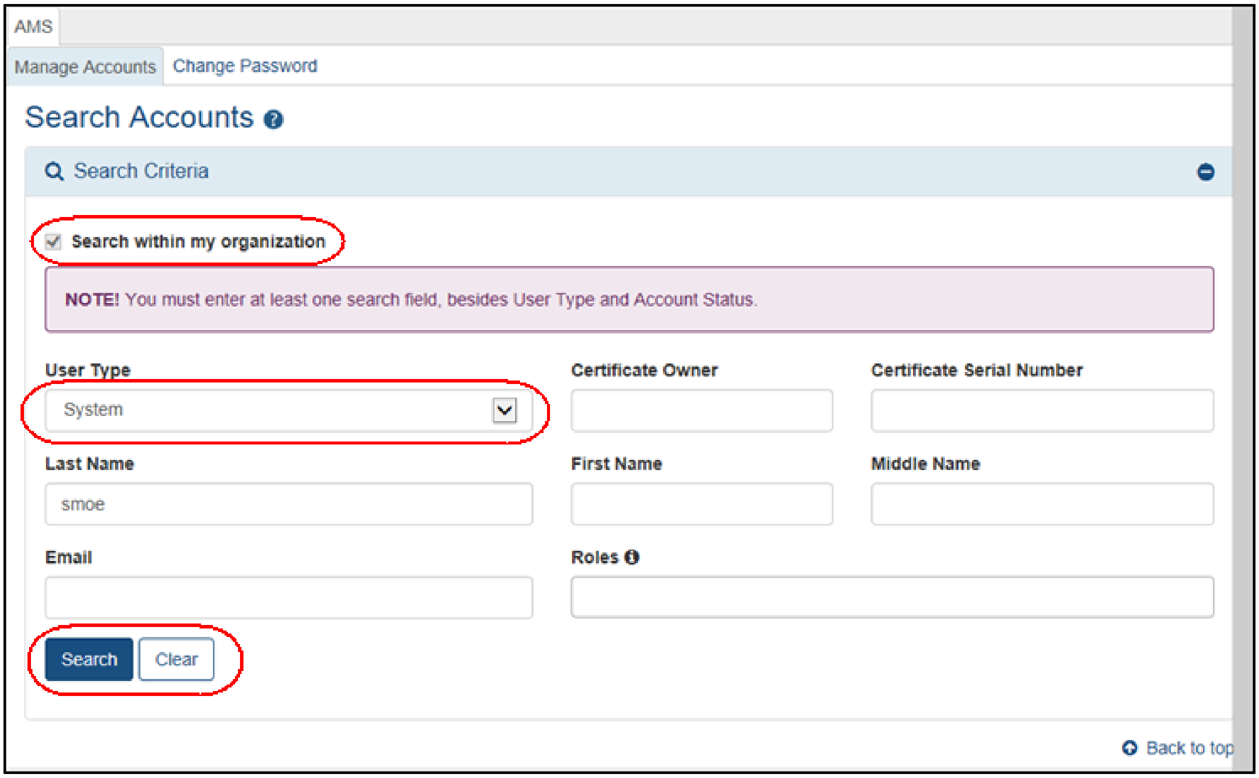


Figure 26: Search Accounts Screen Displaying Searching for System Accounts

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**.

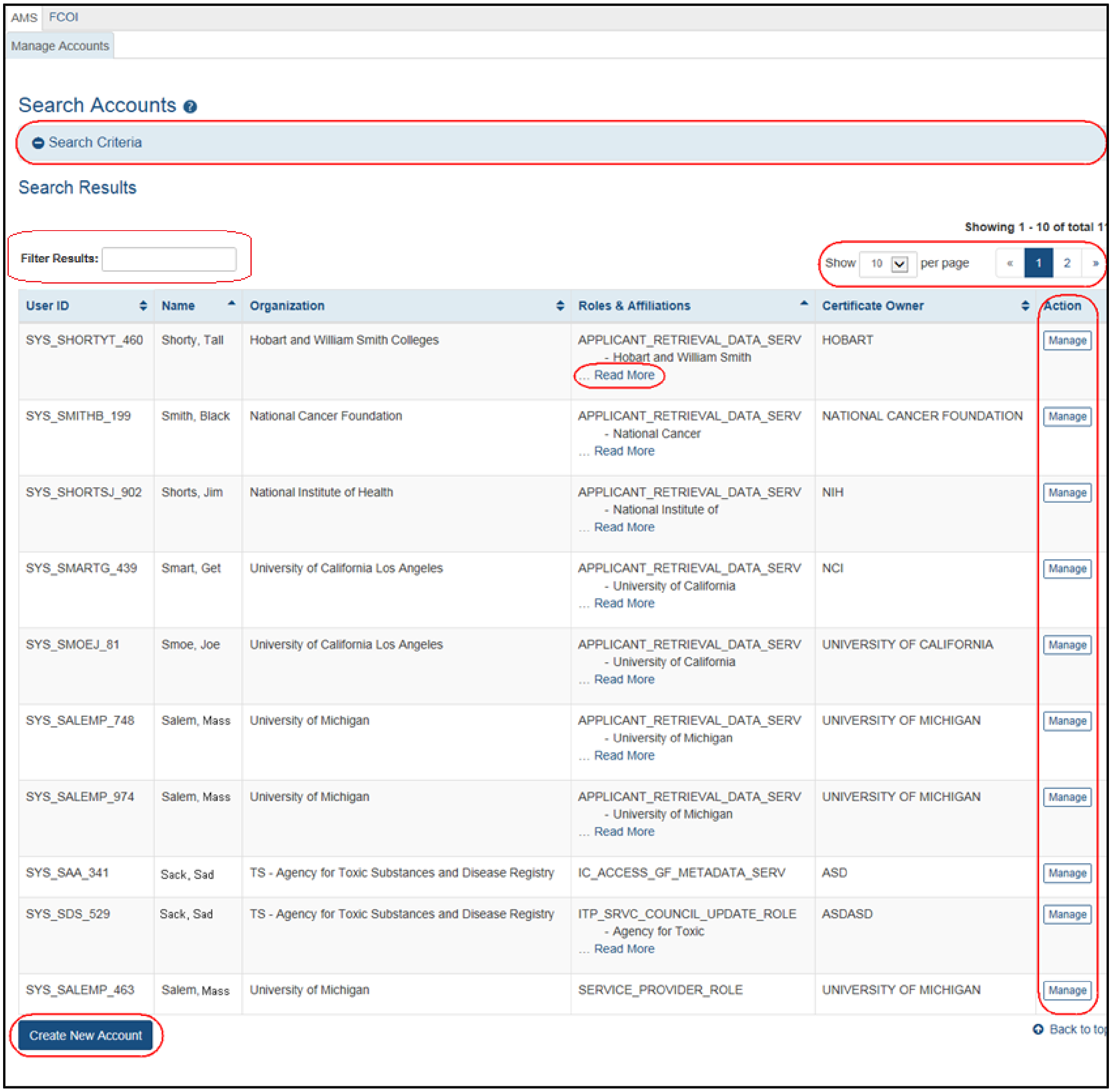


Figure 27: Search Accounts Screen Displaying System Accounts Search Results

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 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

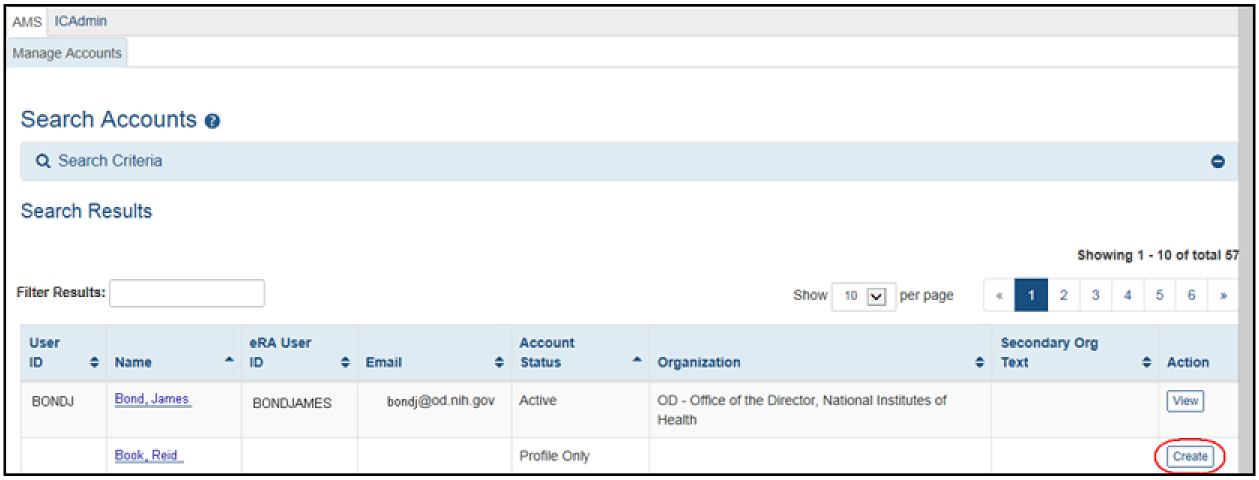


Figure 28: Search Accounts Screen Displaying the Create Button

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

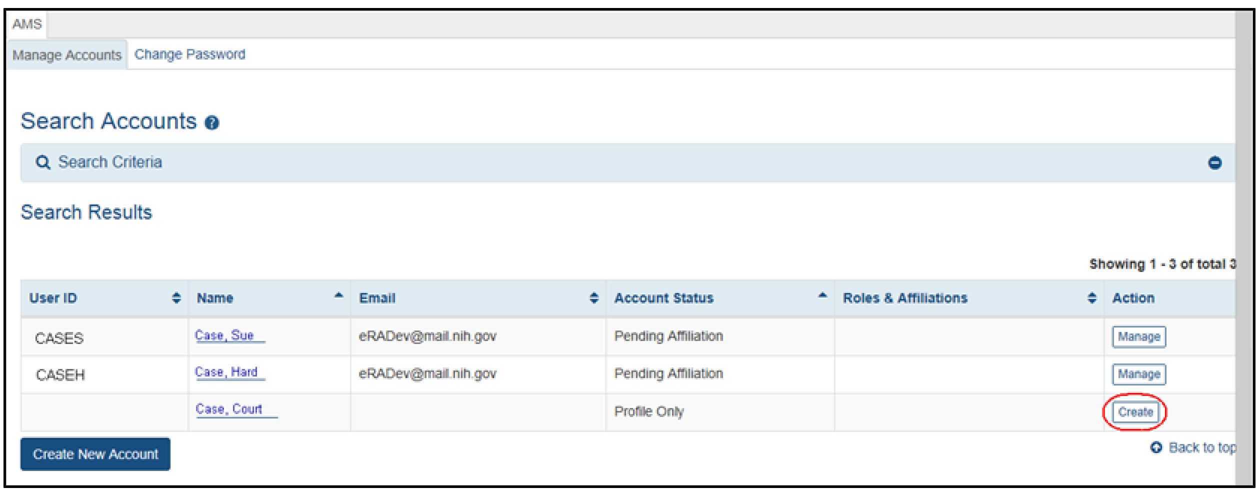


Figure 29: Search Accounts Screen Displaying the Create Button

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.

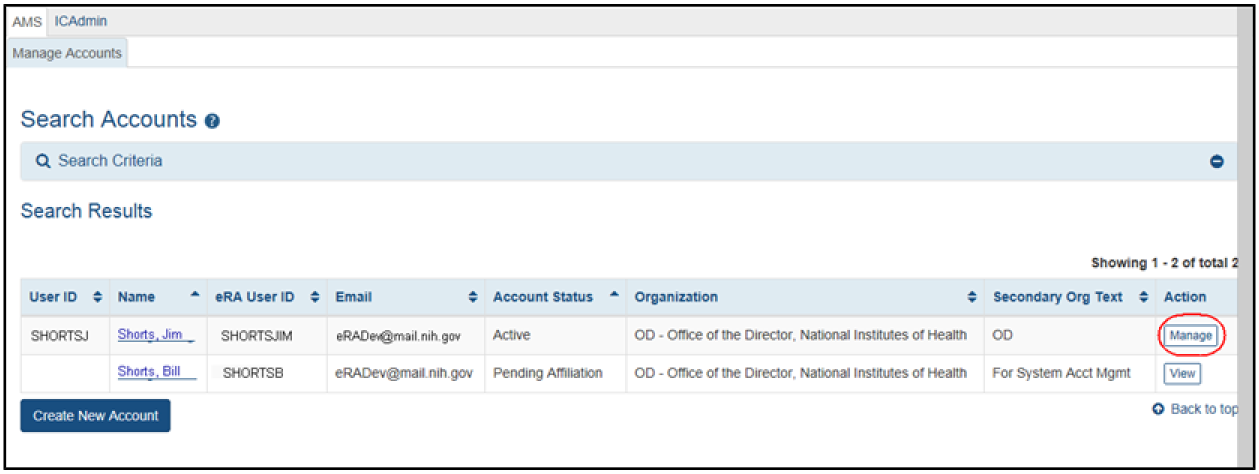


Figure 30: Search Accounts for Internal Users Displaying the Manage Button

When the **Manage** button is clicked, the *Manage Accounts* screen displays.

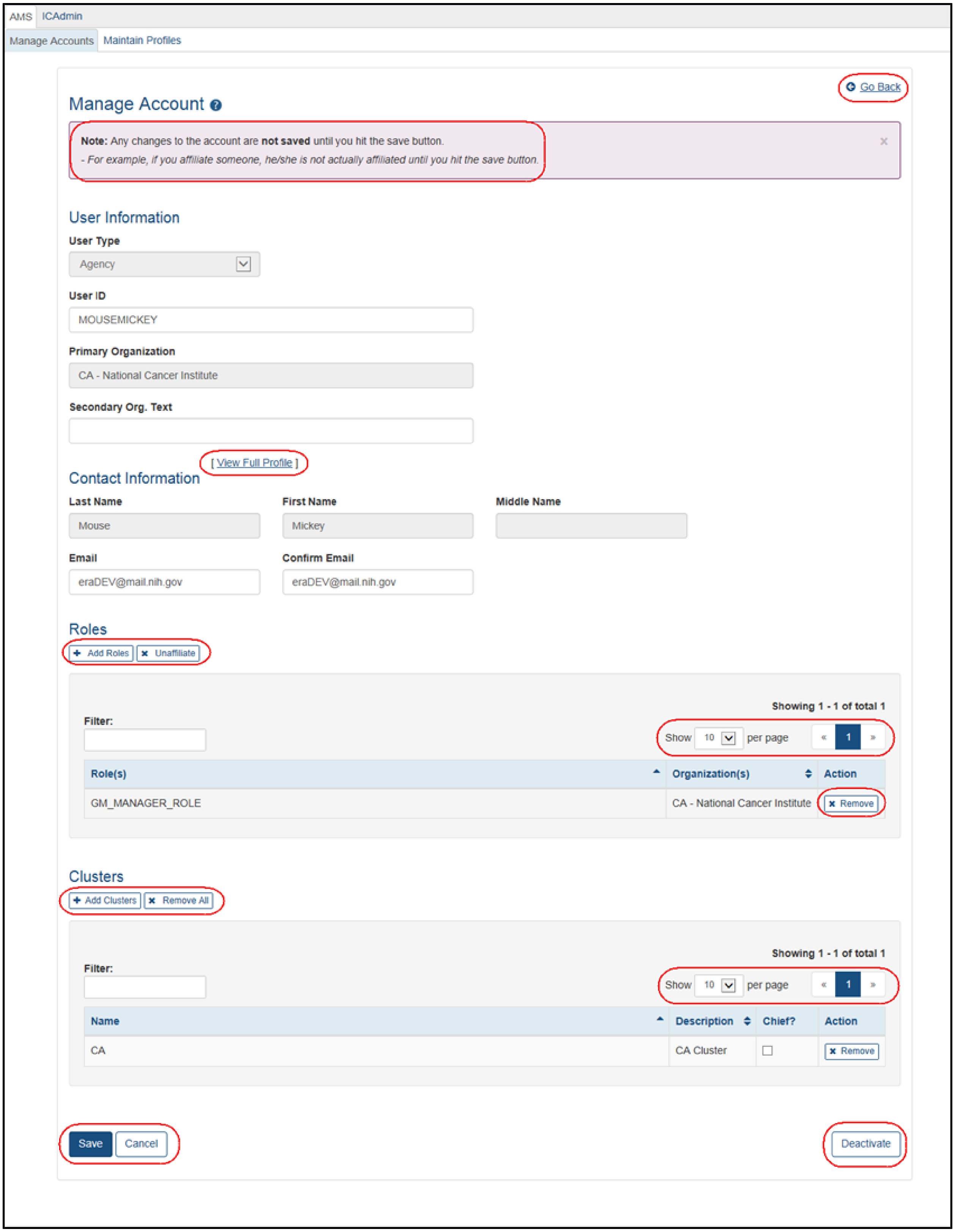


Figure 31: Manage Account Screen for Internal Users

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*.

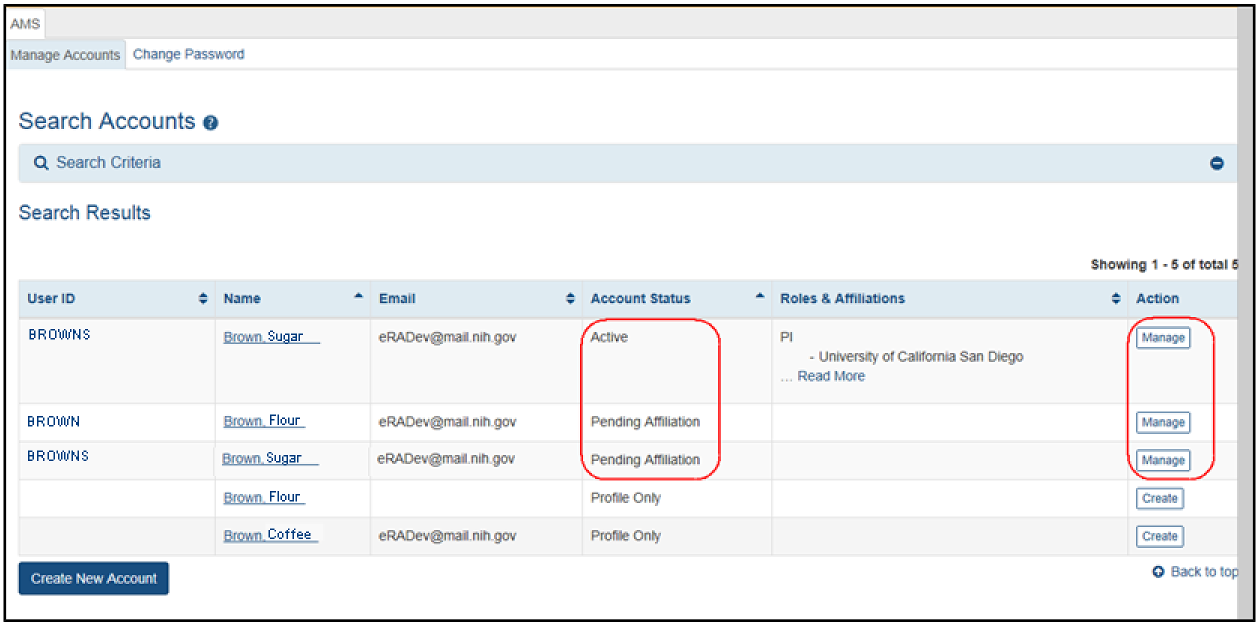


Figure 32: Search Accounts for External Users Displaying the Manage Button

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

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

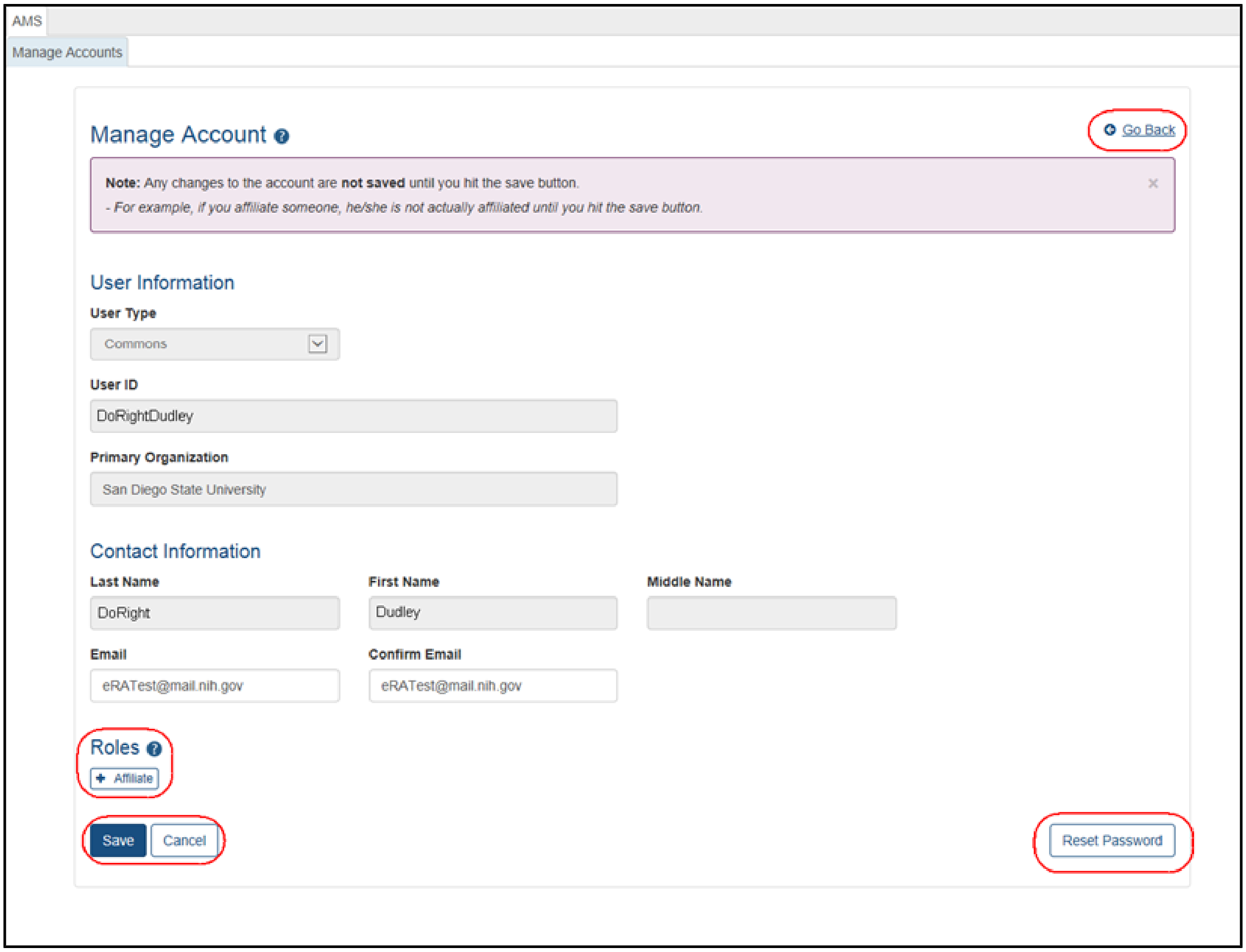


Figure 33: Manage Account Screen for External Users

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*.

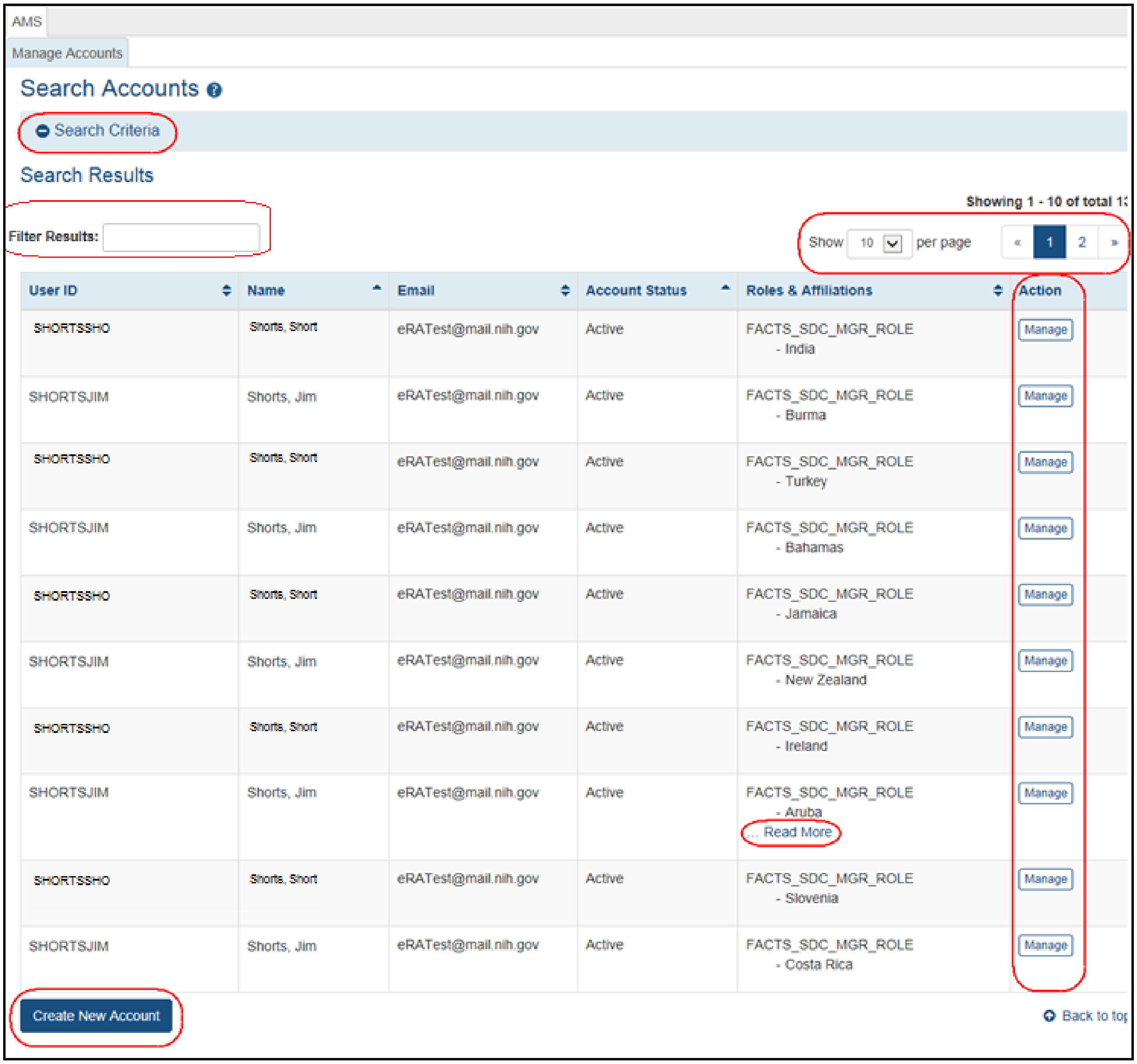


Figure 34: Search Accounts Displaying State Department Search Results

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

When the **Manage** button is clicked, the *Manage Account* screen opens.

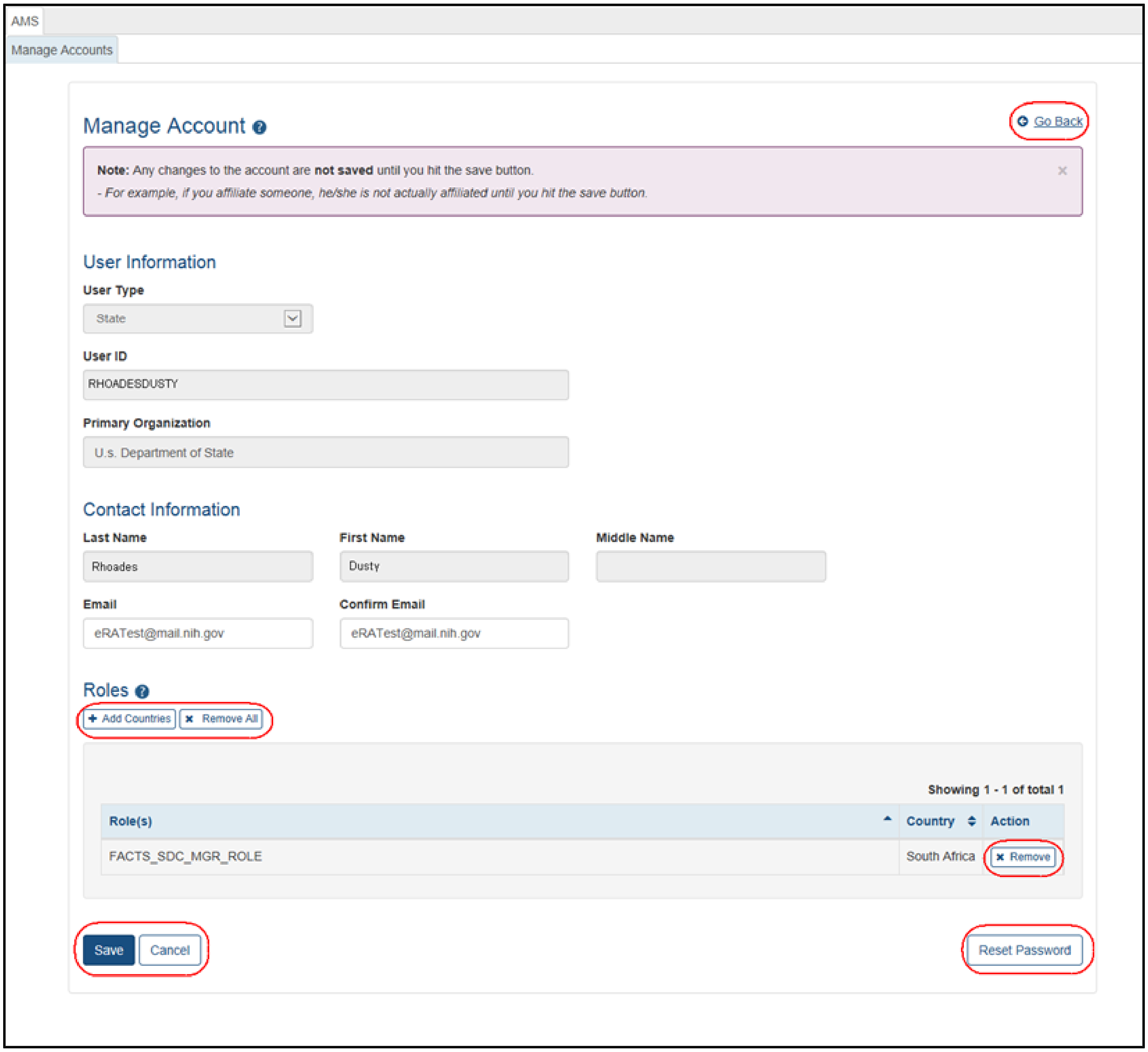


Figure 35: Manage Account for State Department Users

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.

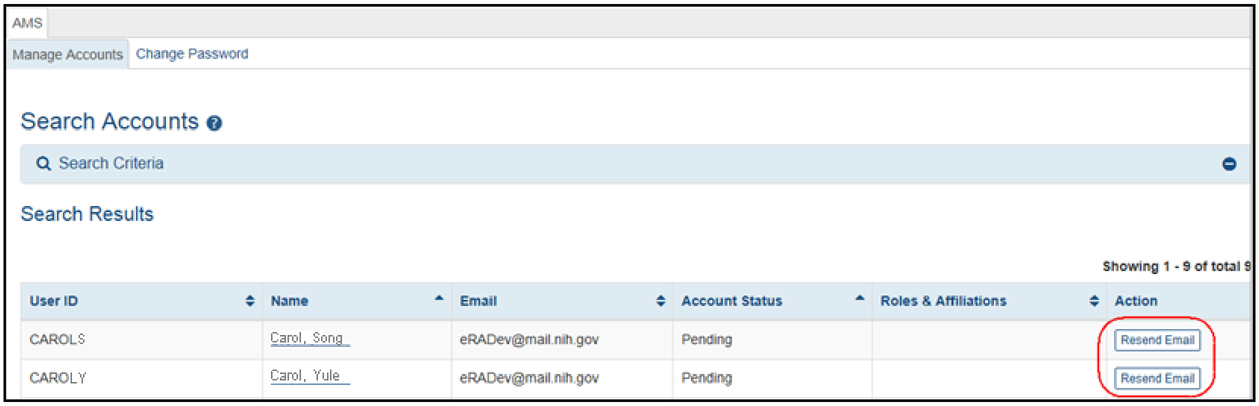


Figure 36: Search Accounts Screen Displaying the Resend Email Button

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.

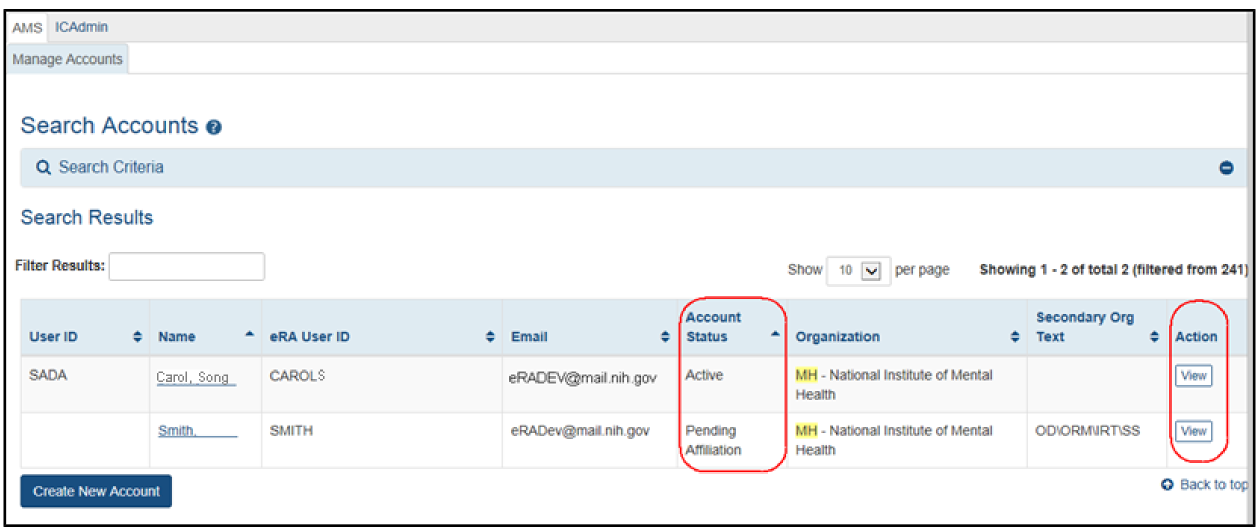


Figure 37: Search Accounts Screen Displaying the View Button

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

When the **View** button is clicked, the *Account Details* screen opens for the appropriate account.

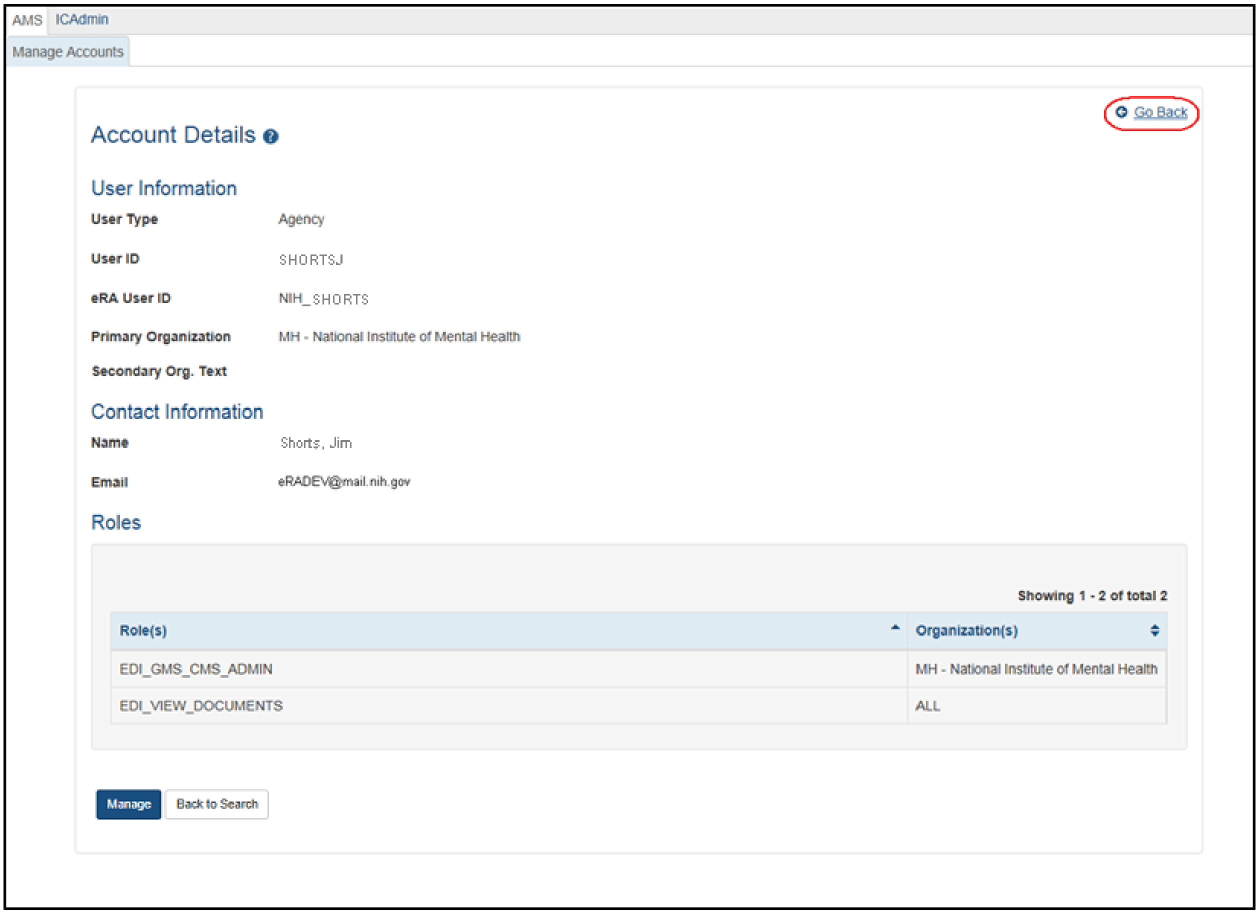


Figure 38: Account Details Screen

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 three basic types of user accounts:

- Agency and iEdison Agency/iEdison Report Lite (ERL)
- Commons and iEdison external
- State Department

5.1.1 Create Agency or iEdison Agency/ERL User Accounts

1. To create an account for an internal user, first search AMS to make sure the user doesn't already have an account. For instructions, see Search for Agency User Accounts or Search for iEdison User Accounts.
2. You launch the create-account process from the Search Results screen:
   - In the search results, profiles that are not already associated to a user account display a **Create** button in the Action column: 

     Click the **Create** button to create a user account for the profile.
   - Or click the **Create New Account** button below the search results:

3. When you click the **Create New Account** or **Create** button, the *Create Account* screen opens, as shown here.

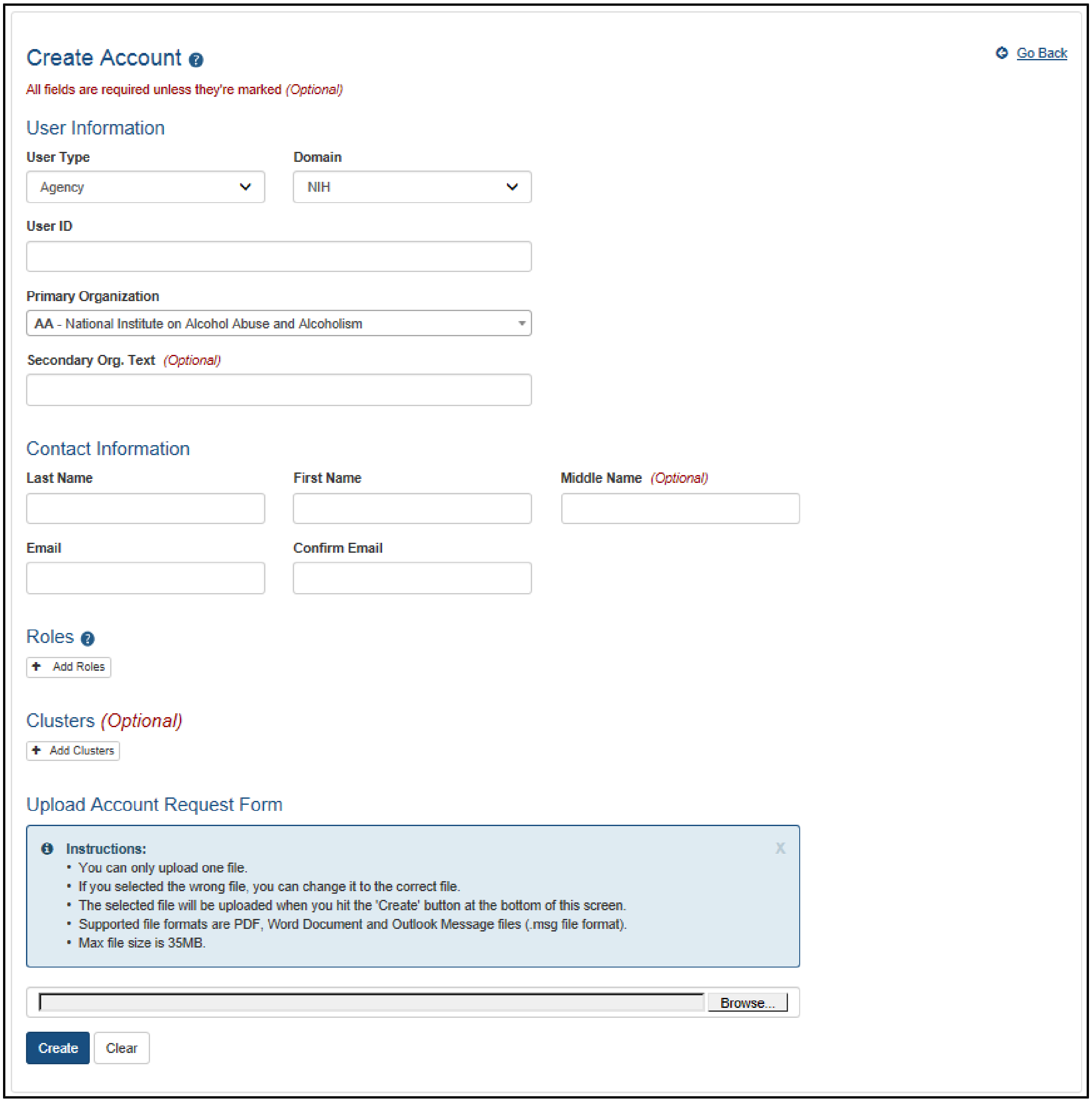


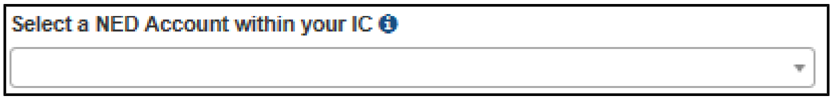
Figure 39: Create Account screen for a new internal account

See the sections below for instructions on how to use this screen to create accounts for NIH internal users and for other types of agency users.

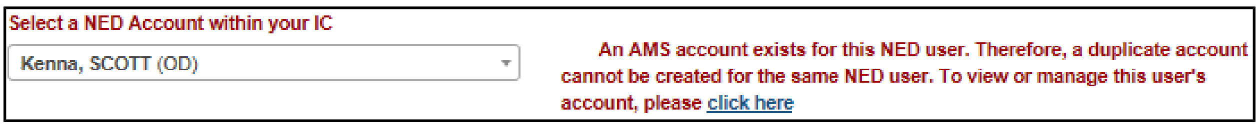
5.1.1.1 NIH internal users

1. Set **User Type** to Agency.
2. Set **Domain** to NIH.

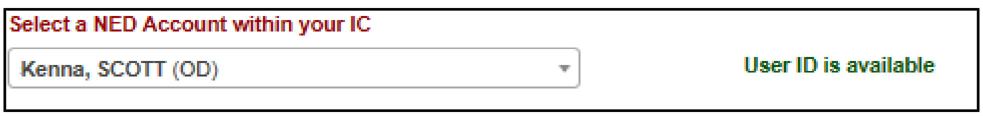
3. When you set the domain to NIH, the **Select a NED Account** field appears, as shown here:



4. Mandatory: Use this field to search the NED system and identify the user profile to associate to the new account: Begin typing the user's last name in the text box. The system searches for matching profiles in your organization and displays them as you type.
5. When the correct profile appears, click to select it.
    a. If the profile is already associated to an account, the system displays a message advising you to manage the existing account rather than create a new one, as shown here:

    b. If the profile is available, the system displays a message saying so, as shown here.

    Continue with the steps below to create an account for the profile.
6. The system generates the **user ID**, so proceed to the **Primary Organization** field and select an organization from the drop-down menu.
7. If applicable, use the **Secondary Organization**text box to enter a secondary organization.
8. Enter the user's **Contact Information** in the text boxes: Last name, first name, middle name (optional) and email address, then reenter the email address.
9. Click the **Add Roles** button to add user roles to the account. See Add/Delete Roles for instructions.
10. If you want to add Initial Review Group (IRG) Clusters, click **Add Clusters**. For instructions see Add/Delete IRG Clusters .
11. Upload the Account Request Form. See Upload Account Request Form for instructions.
12. When you have entered all information for the account, click **Create** to create the account or Click **Clear** to clear all data from the form.

When you click **Create**, the system opens the *Account Details* screen and displays a confirmation message, as shown here:

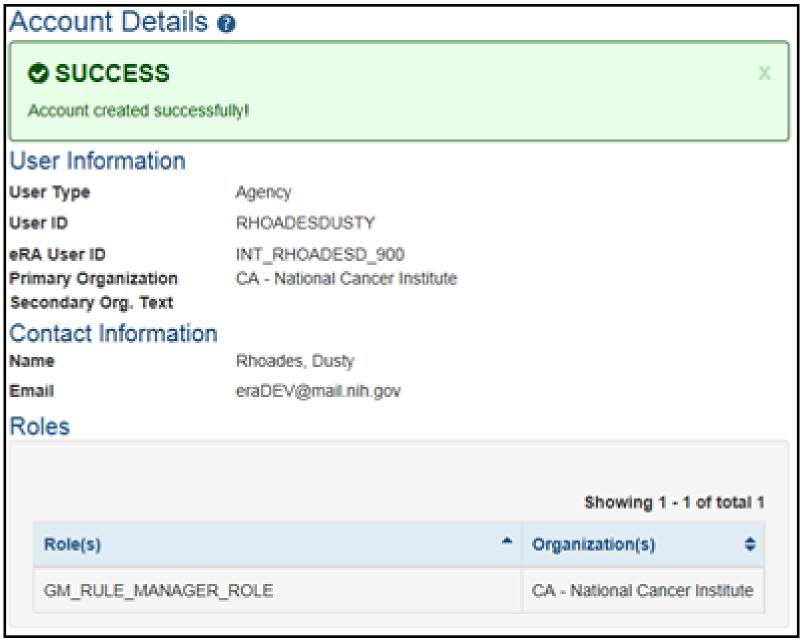


Figure 40: Account Details screen Success message

5.1.1.2 NIH iEdison/ERL, NIH external, and Federation users

1. Set **User Type** to Agency.
2. Choose the appropriate user **Domain**:
    - *NIH iEdison* — internal iEdison/ERL user
    - *NIH external* — external NIH user
    - *Federation* — internal user at non-NIH agency
3. Enter a **User ID**: The User ID must be between 6 and 30 characters long and cannot contain special characters except the @ sign, the hyphen, the period, and the underscore.
   If the ID you enter is available, the system displays a message saying: *This User ID is available.* If it's not available, message will say *This User ID is already taken, please use another one*. Keep tweaking the ID until you find one that is available.
4. Usually the **Primary Organization** defaults to your organization. To use another organization, select it from the drop-down menu.
5. If applicable, use the **Secondary Organization**text box to enter a secondary organization.
6. Enter the user's **Contact Information** in the text boxes: Last name, first name, middle name (optional) and email address, then reenter the email address.
7. Click the **Add Roles** button to add user roles to the account. See Add/Delete Roles for instructions.

8. If you want to add Initial Review Group (IRG) Clusters, click **Add Clusters**. For instructions see Add/Delete IRG Clusters.
9. Upload the Account Request Form. See Upload Account Request Form for instructions.
10. When you have entered all information for the account, click **Create** to create the account or Click the **Clear** to clear all data from the form.

When you click **Create**, the system opens the *Account Details* screen and displays a confirmation message, as shown above.

5.1.2 Create Commons or external iEdison user account for an individual (e.g., PD/PI)

1. To create an account for an external user, first search AMS to make sure the user doesn't already have an account. For instructions, see Search Account for Commons Accounts or Search for iEdison User Accounts.
2. You launch the create-account process from the Search Results screen:
   - In the search results, profiles that are not already associated to a user account display a **Create** button in the Action column: 

     Click the **Create** button to create a user account for that profile.
   - Or click the **Create New Account** button below the search results:

NOTE: For external iEdison users, click the **Create an iEdison Account** hyperlink on the iEdison *Main Menu* screen to create an account.

3. When you click one of the **Create** buttons, the *Create Account* screen opens, as shown below.

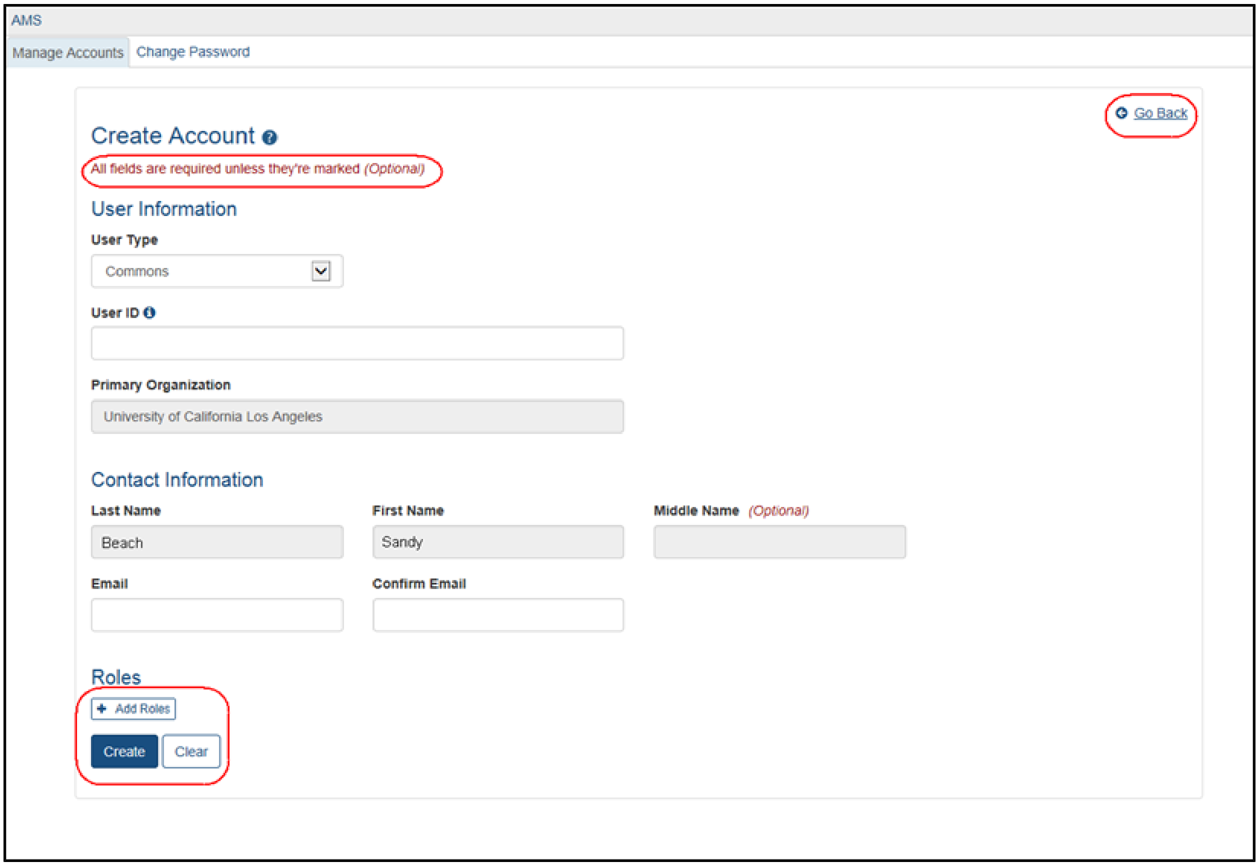


Figure 41: Create Account Screen for an External Account

Perform the following steps to create an account:

4. Set **User Type** to Commons.
5. 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*.
6. Usually the **Primary Organization** defaults to the logged in user's organization.
    a. If there is no user organization name selected, click the magnifying glass icon to assign a **Primary Organization**. (See Set Primary Organization for more information.)
7. Perform one of the following options:
    a. When the account information is complete, click **Create** to create the account or click **Clear** to clear all information from the form.

When you click **Create**, the system displays the *Account Details* screen with a confirmation message, as shown here.

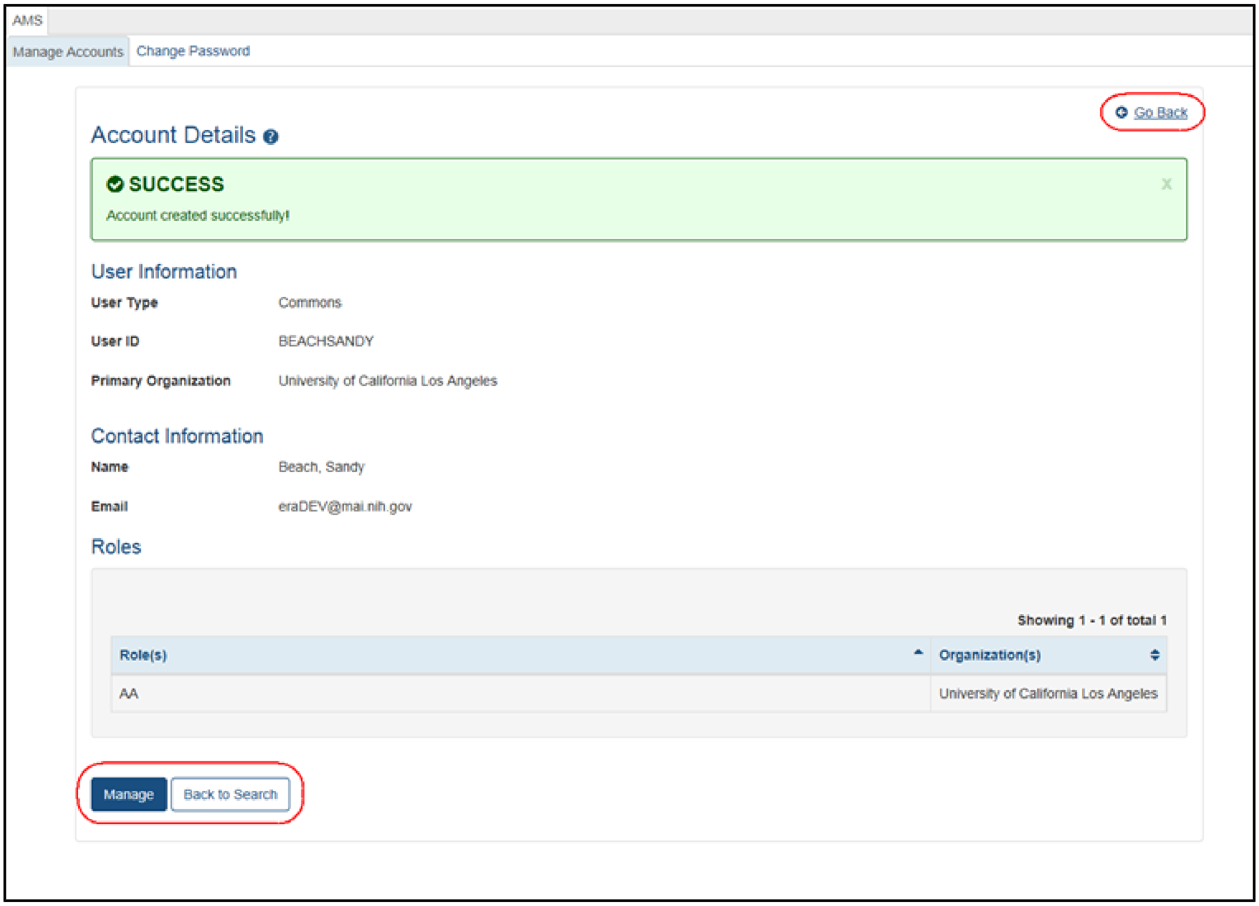


Figure 42: Account Details Screen Displaying Message

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.

5.1.2.1 Account Invitations from eRA Systems

Create-Account requests for Commons accounts that are validated by invitations from eRA modules can be approved or rejected automatically:

- If the identifying information the new user submits unambiguously matches the profile selected by the account requester and the profile is not already associated to another user account, the request is approved automatically.

- If the identifying information is incorrect or an account already exists for the user profile, or if a comment has been entered in the user's funding and committee service history, request is denied and the system sends notifications to the account requester and to the eRA Service Desk.

Examples of system-generated account invitations:

- **SO creates a new PI account in AMS**

  The new PI receives a system-generated invitation to log in to eRA Commons and validate the account.

- **SRO enables a new reviewer in Internet Assisted Review (IAR)**

  The reviewer receives a system-generated invitation to log in to eRA Commons and create an account to access IAR. See the IAR Online Help for information on enabling reviewers

- **PD/PI appoints a new trainee in xTrain**

  The trainee receives a system-generated invitation to log in to eRA Commons and create an account to access xTrain. See xTrain Online Help for information on appointing trainees.

Workflow

The account invitation procedure includes these steps:

1. The account requester creates the new account.
2. The new user receives an email notification that includes the username and other details about the new account.
3. The user receives a second email that includes a temporary password for the new account and instructions for logging into the system.
4. The user logs in with the provided credentials and is immediately instructed to create a new password for the account.

NOTE: If the user enters incorrect login information too many times, the account is locked and the user must contact the eRA Service Desk to complete the login process.

If you receive an account notification email from eRA, follow these instructions for validating your new account: Notification of New eRA Account

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 opens.

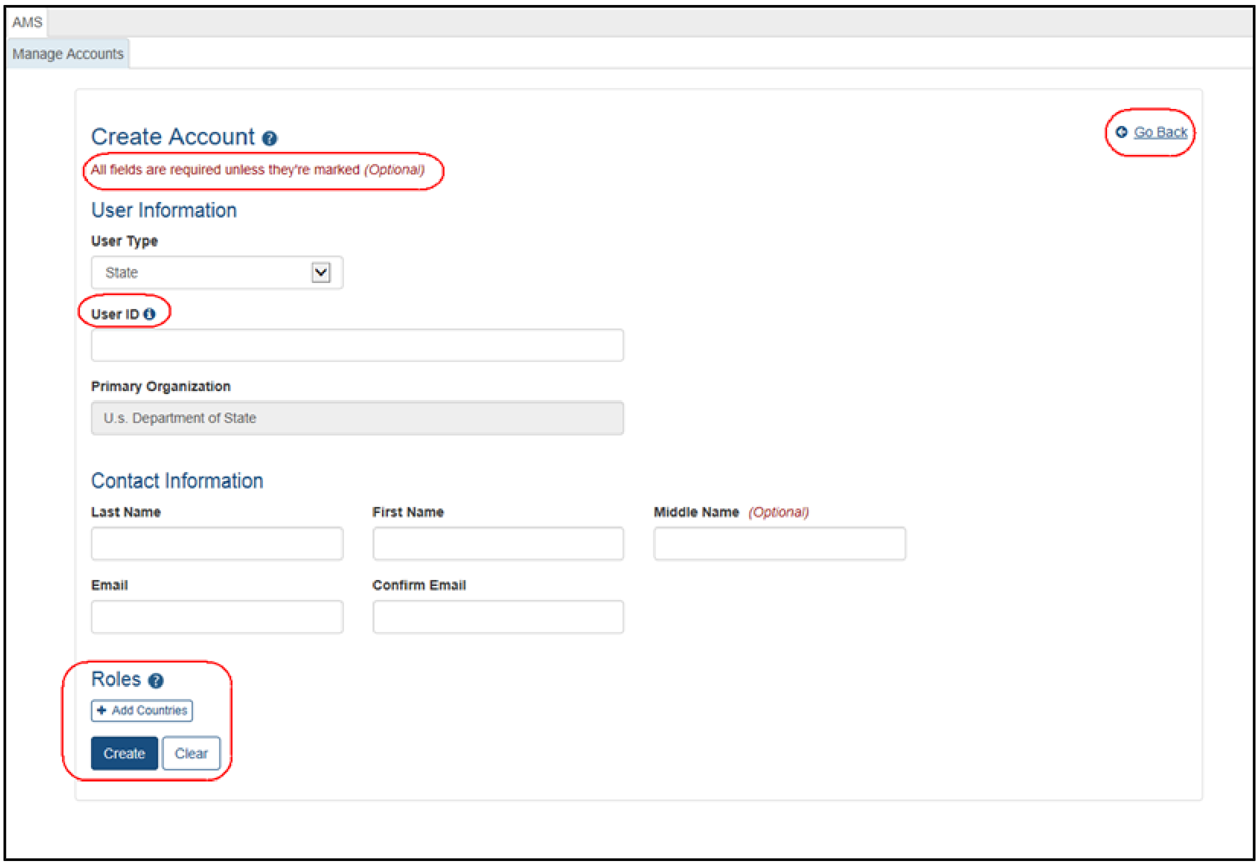


Figure 43: Create Account Screen for State Department Users

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*.

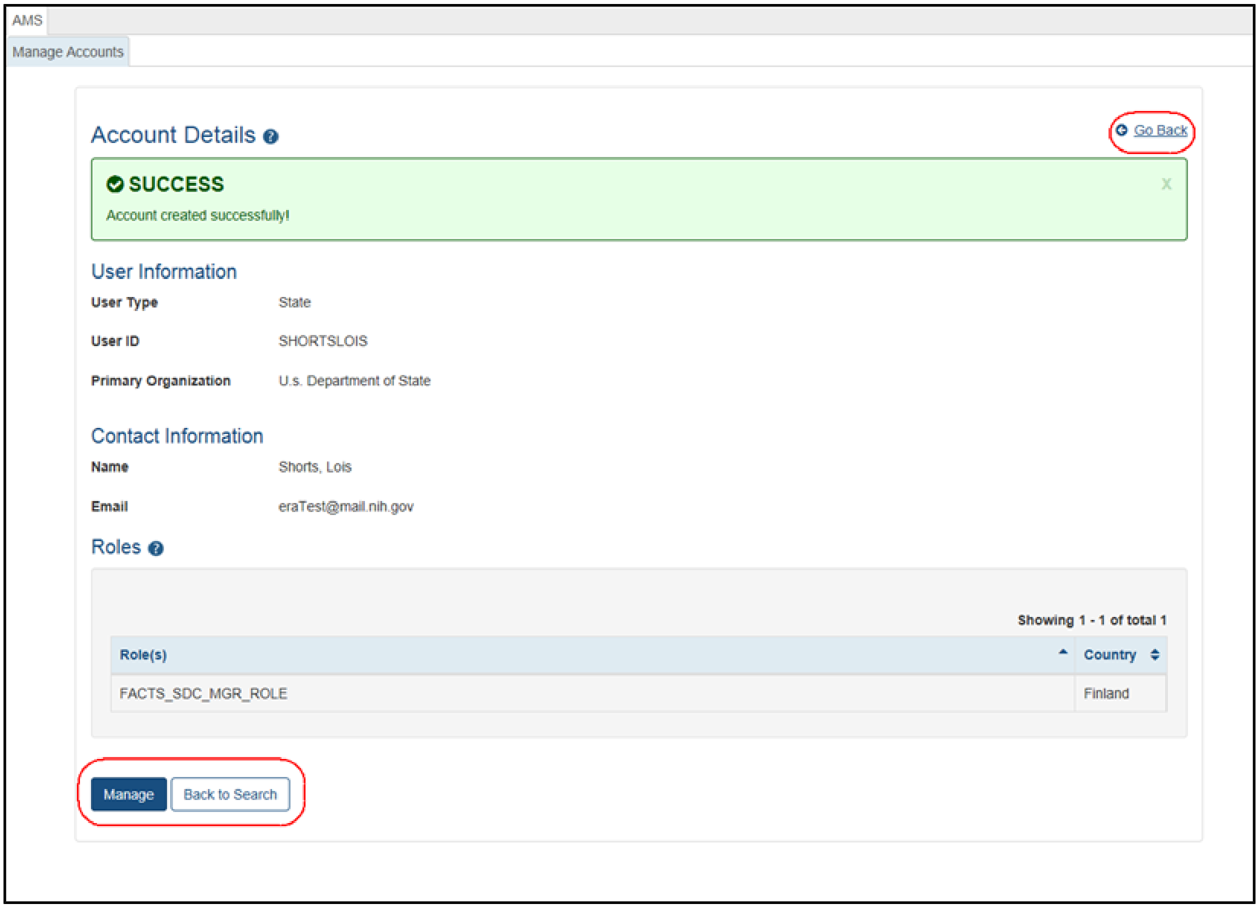


Figure 44: Account Details Screen for State Department Users

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.

Figure 45: Add Countries Button

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

Figure 46: Add Countries Screen

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.

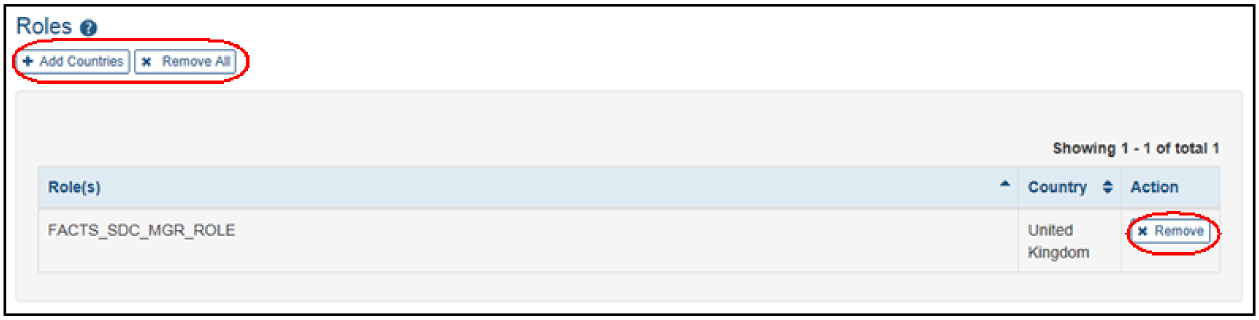


Figure 47: Roles/Add Countries Section on the Create Account Screen

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

NOTES:

- The list of roles displayed is dependent on the logged in user's role.
- Accounts with scientific roles should be maintained for the career of the scientist and affiliations should be added as necessary.
- Administrative roles cannot be combined with scientific roles on the same user account and accounts with administrative roles cannot be affiliated with more than one institution.
- State Department users only - For information on adding countries, please refer to the Add/Delete Countries topic.

1. To add user roles to an account, click the + **Add Roles** button on the *Create Account* or *Manage Account* screen.
2. The Add Roles button lets you add user roles within the account-holder's organization.
3. Alternatively, eRA Service Desk agents can click the **Add Roles to Other org** button to give the account user roles in another organization.

Figure 48: Add Roles Buttons

5.1.4.1 Commons Users

When the + **Add Roles** button is clicked, the .

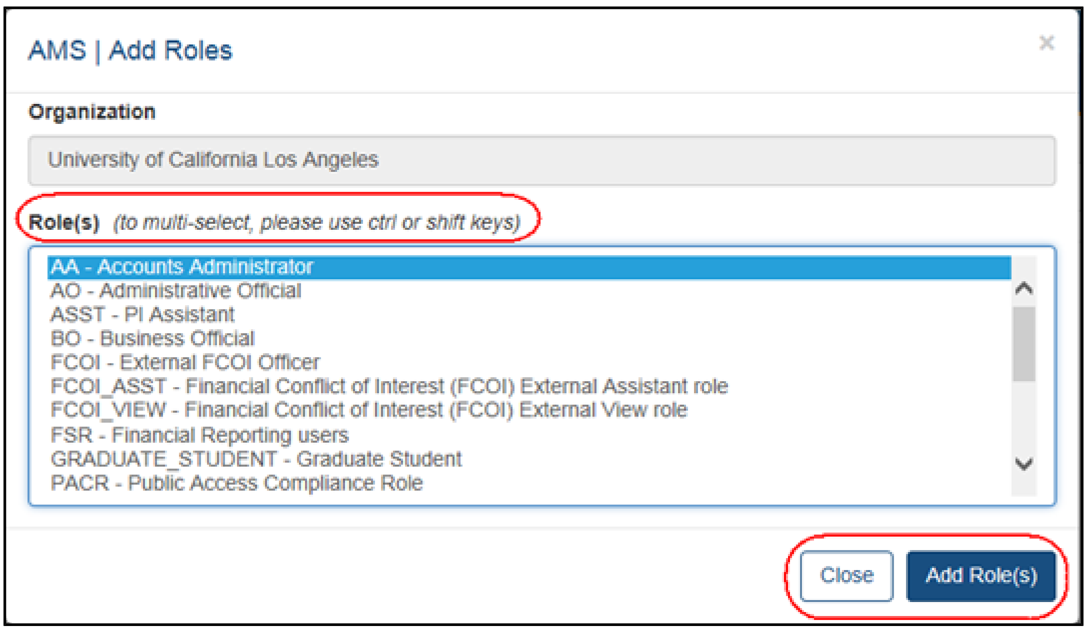


Figure 49: Add Roles Screen

1. Select the appropriate role(s).
   Note: For reference, here is a complete list of Commons user roles.
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).

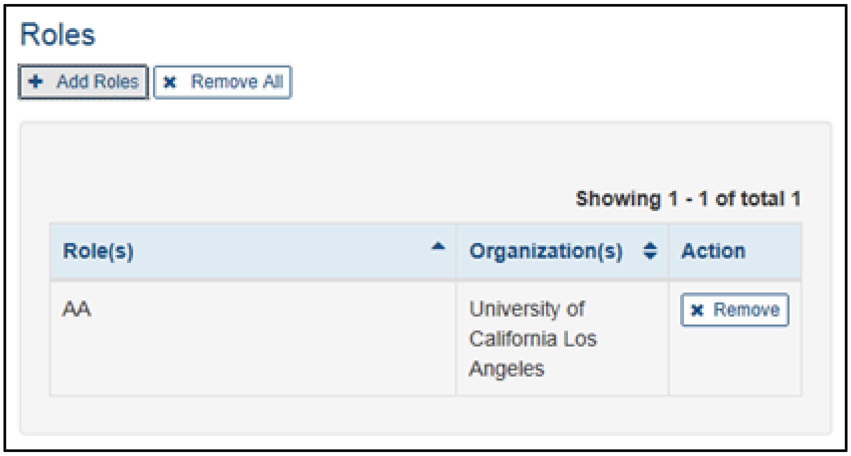
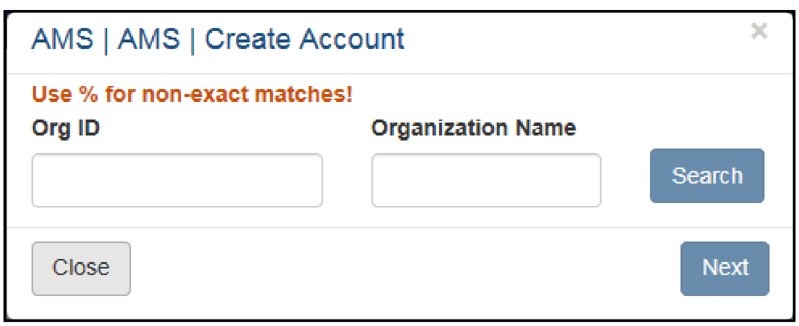


Figure 50: Roles Section on the Create Accounts Screen for Commons Users

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: When the + **Add Roles to other org.** button is clicked, a pop-up search window opens so you can search for and select the other organization, as shown here.



Select the other organization in this window and click **Next** to proceed to the *Add Roles* screen shown above.

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

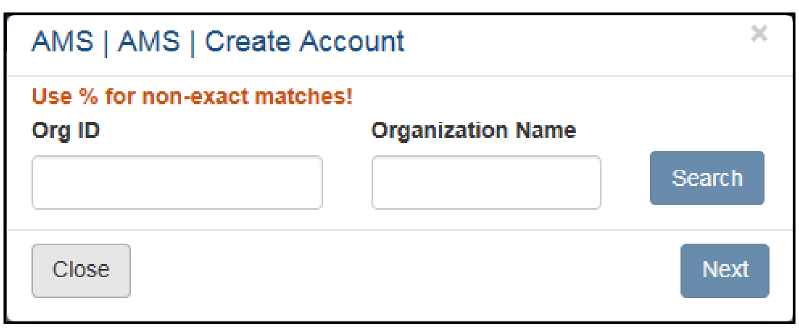
IMPORTANT: For Agency and iEdison Agency users there are certain combination of roles that cannot be granted to an account for a specific IC.

List of Conflicting Roles
RR_CHIEF_ROLE and GM_MANAGER_ROLE
ICO PROGRAM OFFICIAL ROLE and GM_MANAGER_ROLE
RR_SUPERVJSOR_ROLE and GM_MANAGER_ROLE (This role combination requires a waiver from the OPERA Director.)
UADM_ USER_ ROLE and GM_MANAGER_ROLE
UADM_ USER_ ROLE and GM_FMO_ROLE
IPF_CLERK_ROLE and GM_MANAGER_ROLE
IPF_SPECIALIST_ROLE and GM_MANAGER_ROLE
IPF_SUPER_USER_ROLE and GM_MANAGER_ROLE
GM_MANAGER_ROLE and GM_FMO_ROLE
UADM_ ADMIN_ ROLE and GM_MANAGER_ROLE
UADM_ ADMIN_ ROLE and ICO_PROGRAM_OFFICIAL_ROLE
UADM_ ADMIN_ ROLE and GM_FMO_ROLE

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.

Note: When the **+ Add Roles to other org.** button is clicked, a pop-up search window opens so you can search for and select the other organization, as shown here.



Select the other organization in this window and click **Next** to proceed to the *Add Roles* screen shown below.

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

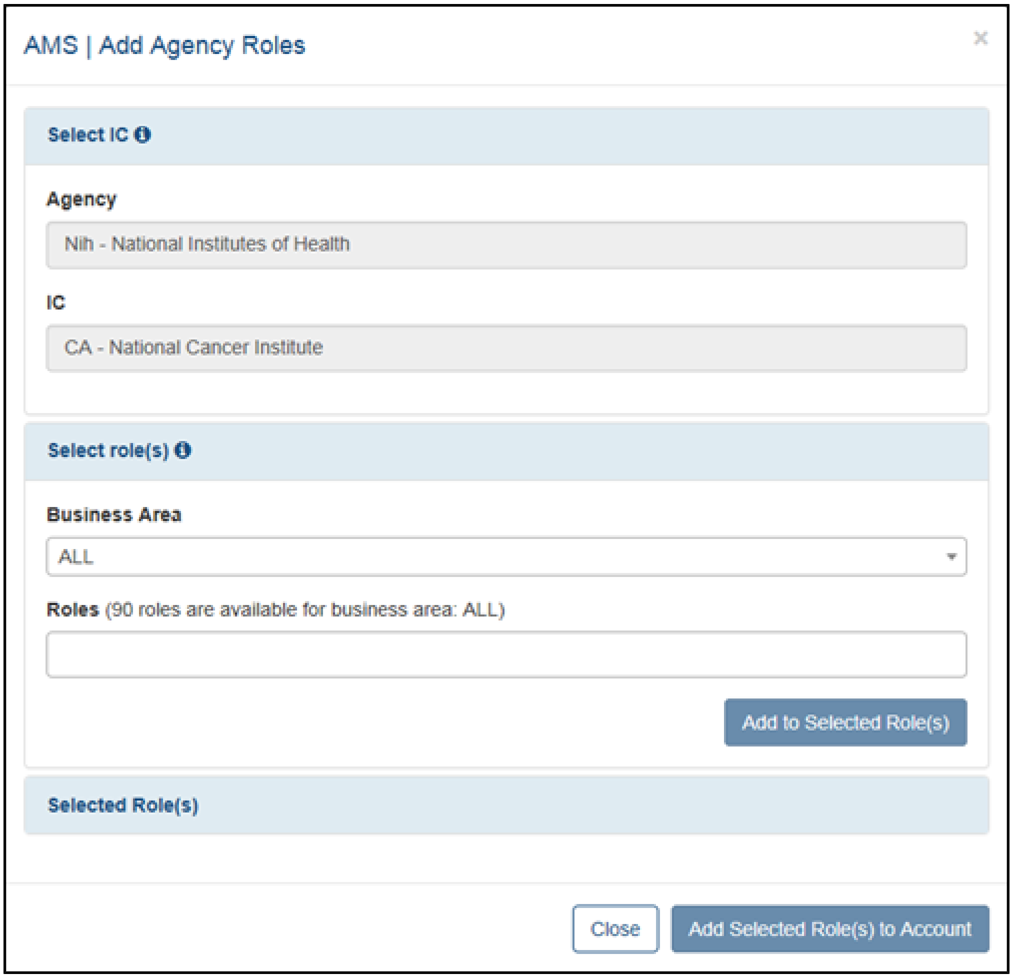


Figure 51: Add Agency Roles Screen for Internal Users

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.

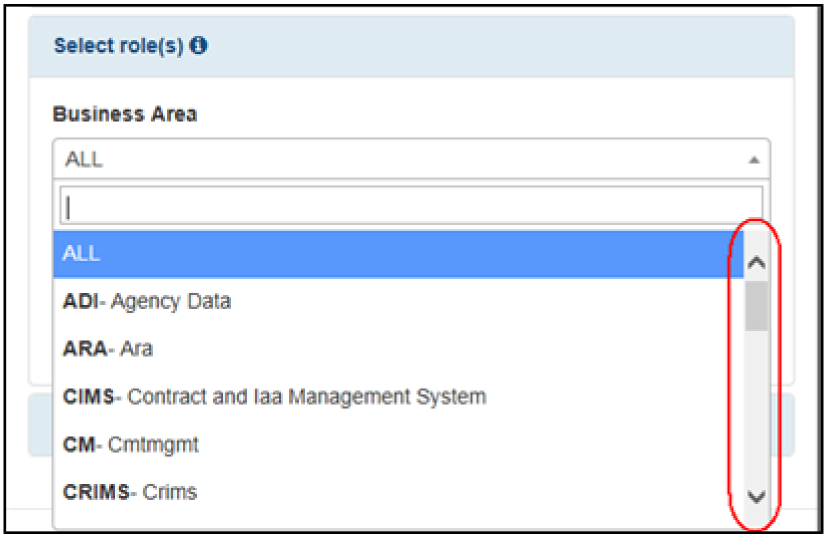


Figure 52: The Business Area Drop-down Menu on the Add Agency Roles Screen

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

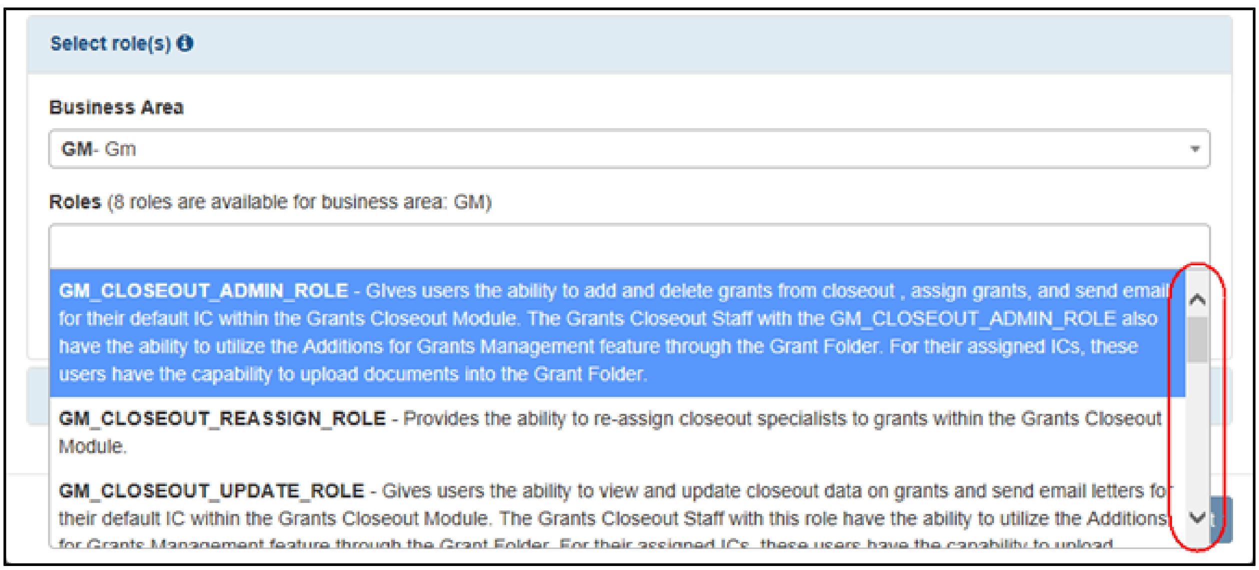


Figure 53: The Role Drop-down Menu on the Add Agency Roles Screen

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

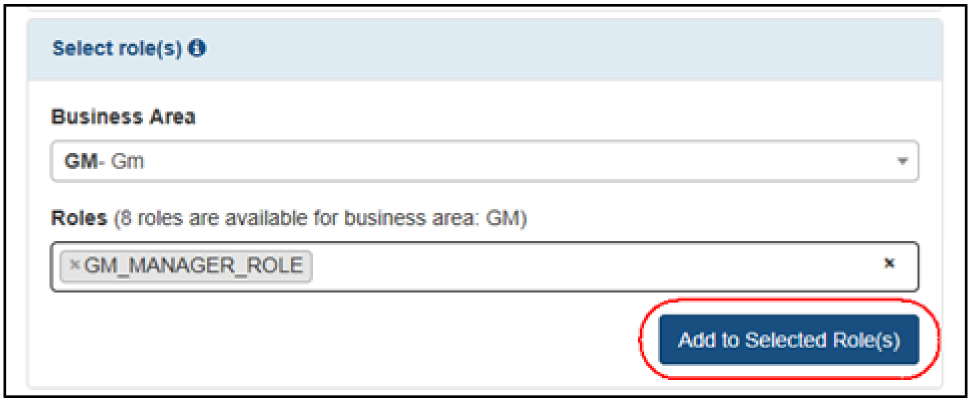


Figure 54: Add Agency Roles Screen Displaying the Add to Selected Role(s) Button

When the **Add to Selected Role(s)** button is clicked, the role is added on the *AMS | Add Roles* screen .

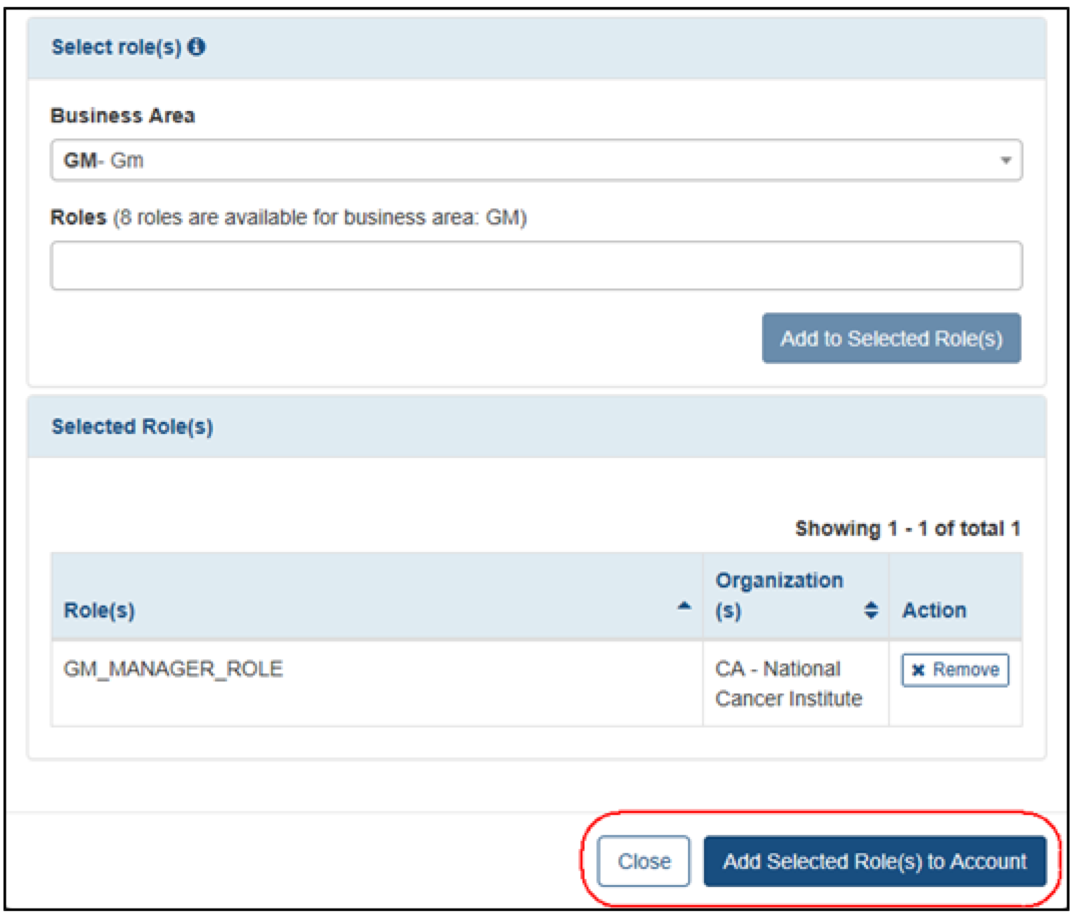


Figure 55: Selected Role(s) Section on the Add Agency Roles Screen

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 appears on the *Create Accounts* or *Manage Account* screen.

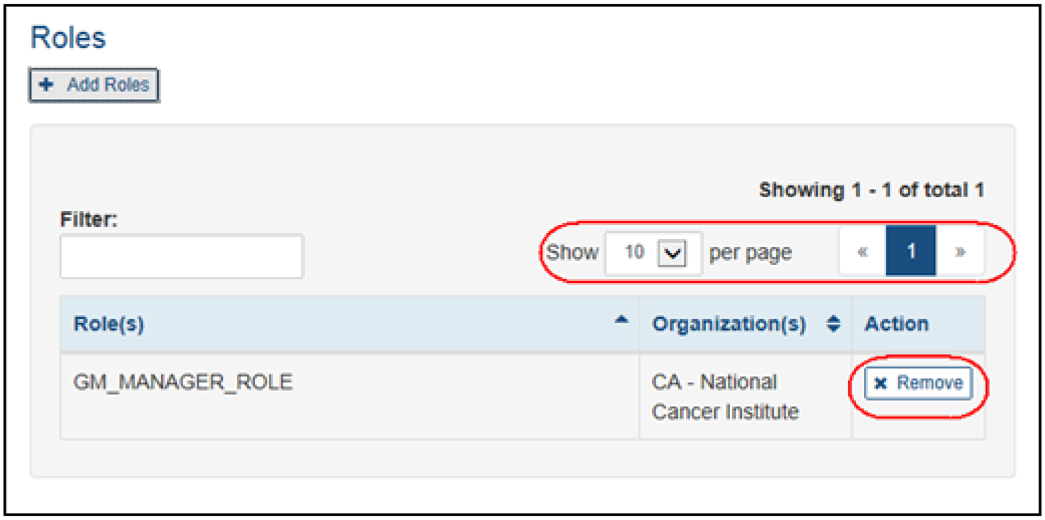


Figure 56: Roles Section on the Create Accounts Screen

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*.

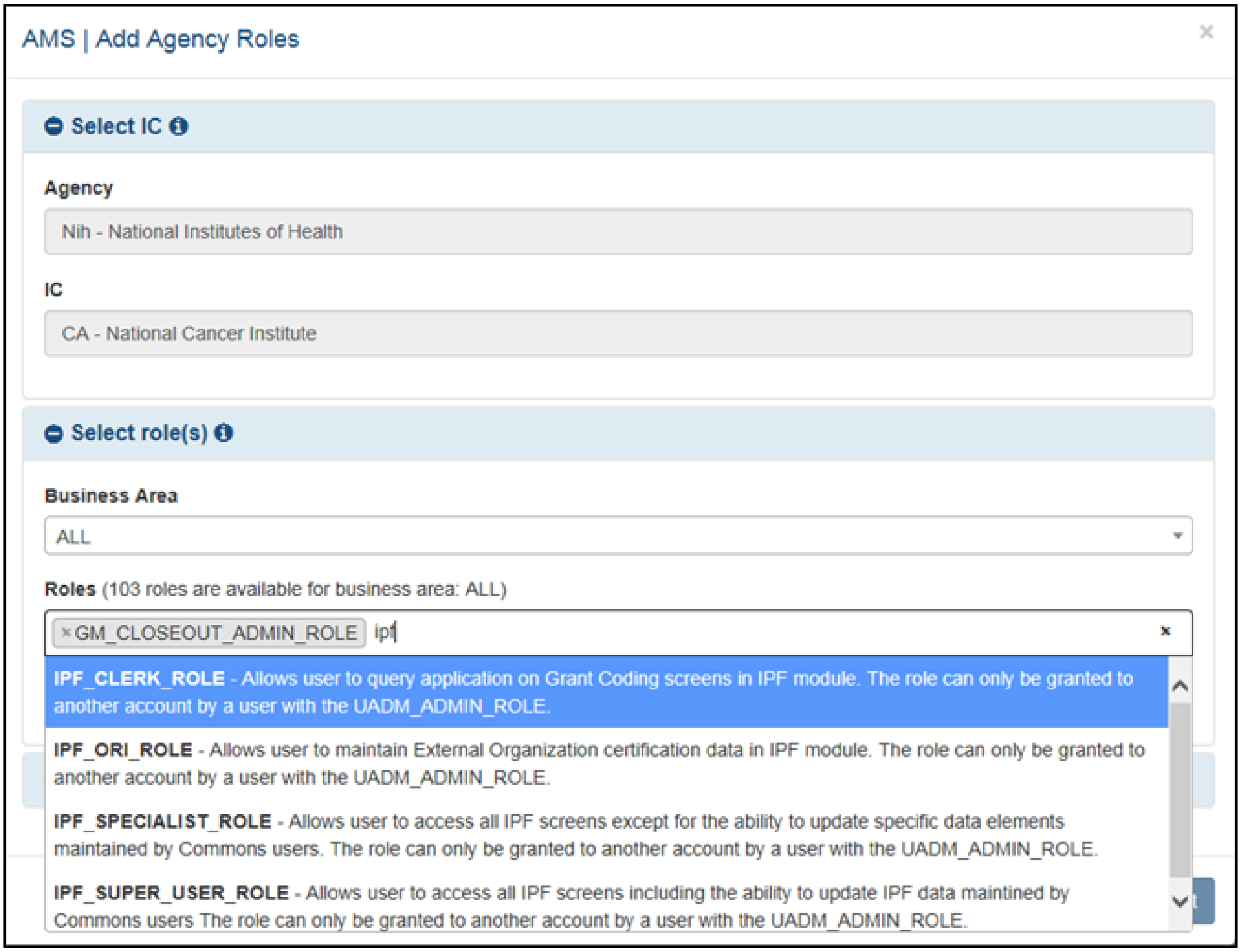


Figure 57: Add Agency Roles Screen Displaying Adding Multiple Roles

10. Select the next appropriate role.

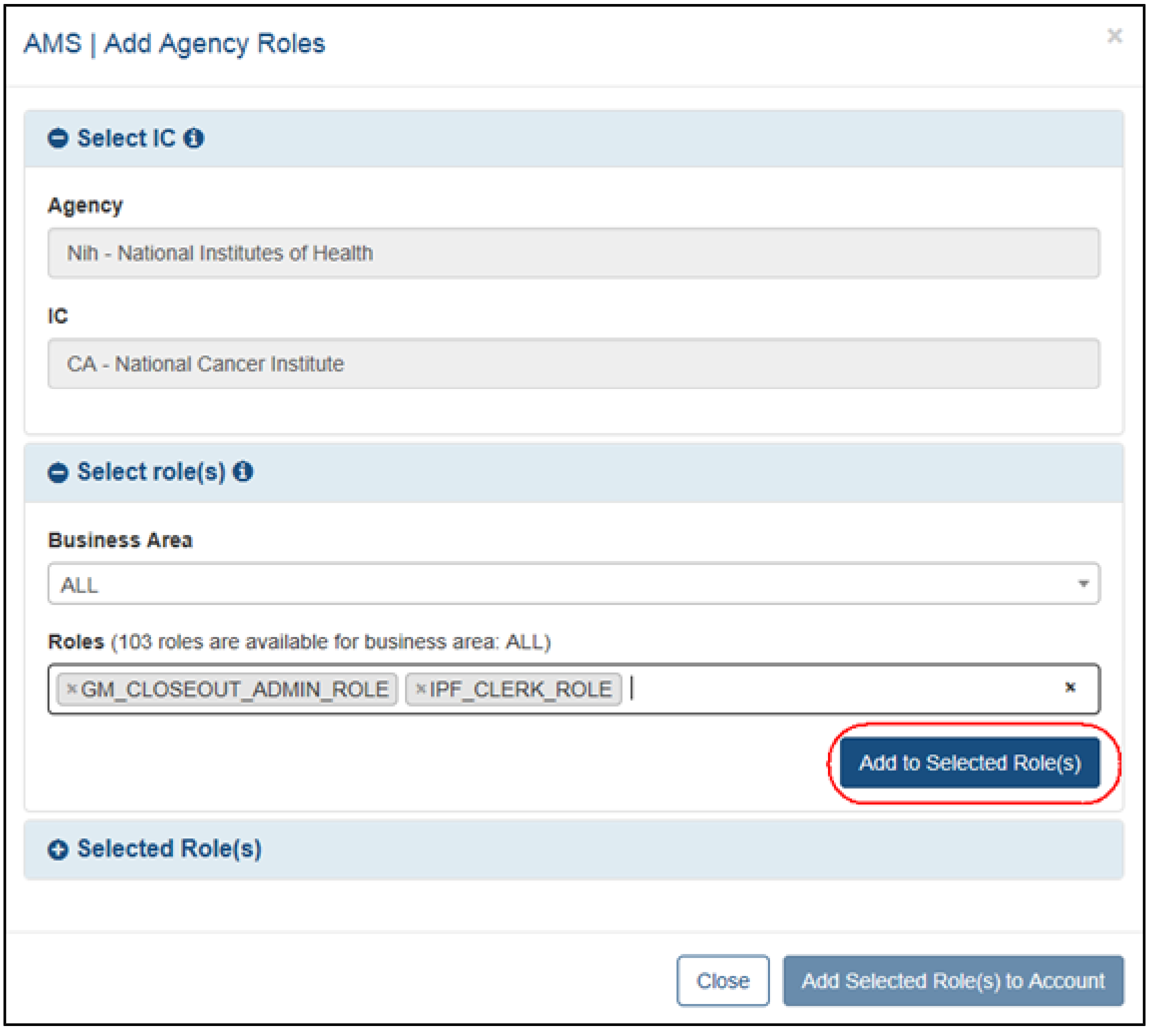


Figure 58: Add Agency Roles Screen Displaying the Add to Selected Role(s) Button

11. Click the **Add to Selected Role(s)** button to add the selected roles.

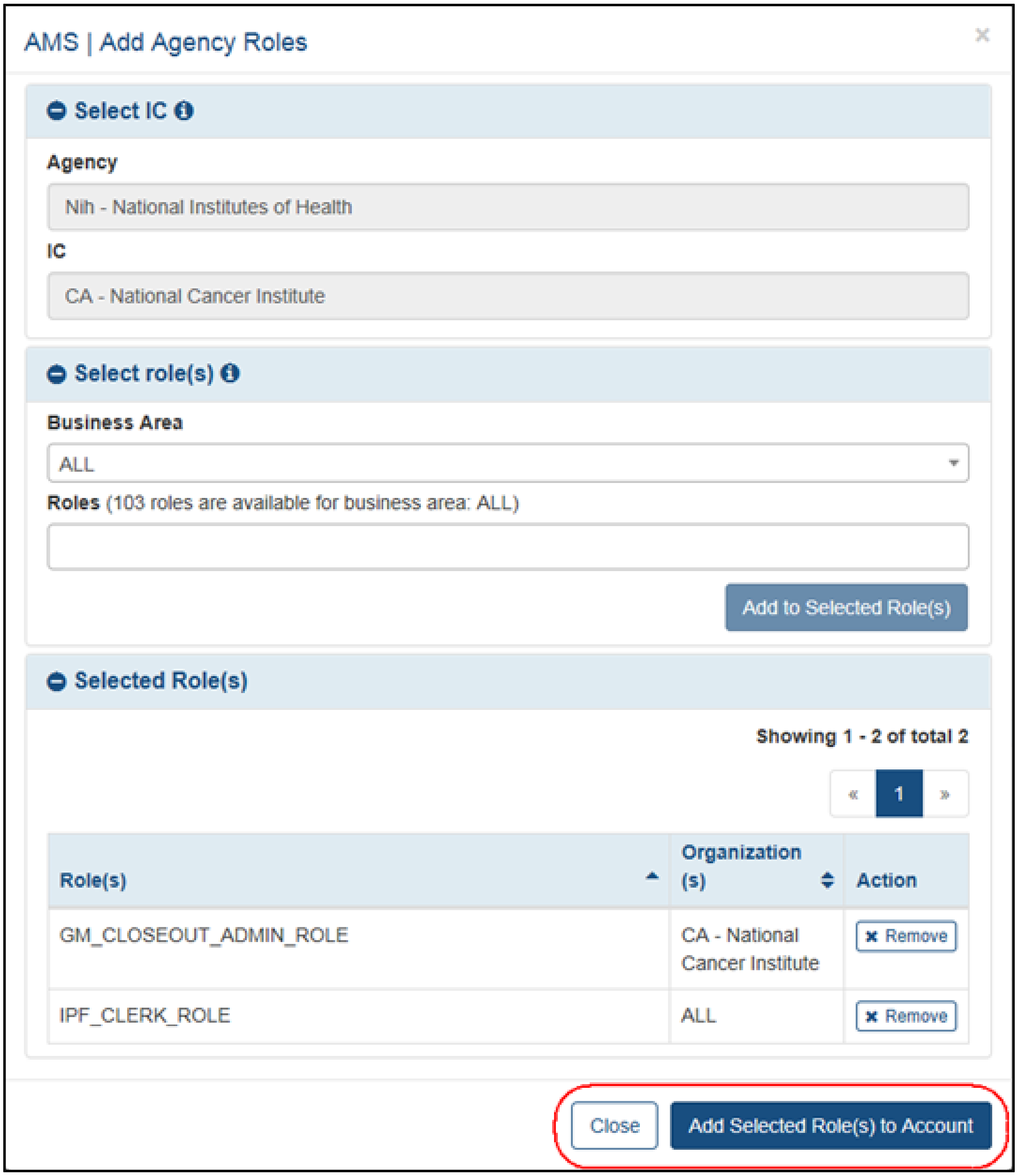


Figure 59: Add Agency Roles Screen Displaying the Add Selected Role(s) to Account Button

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 appears 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.

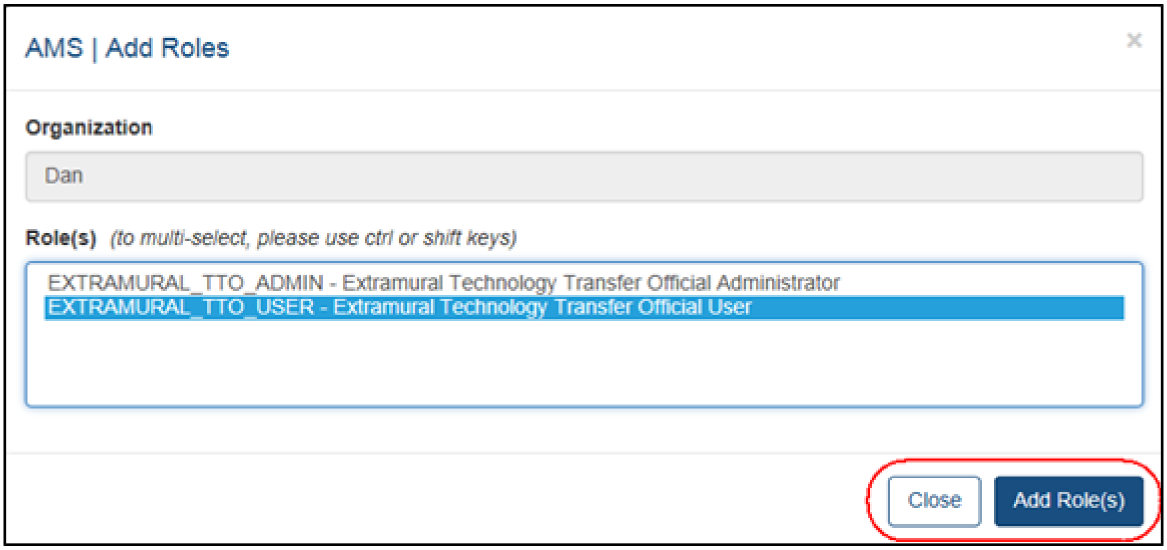


Figure 60: Add Roles Screen for External iEdison Users

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).

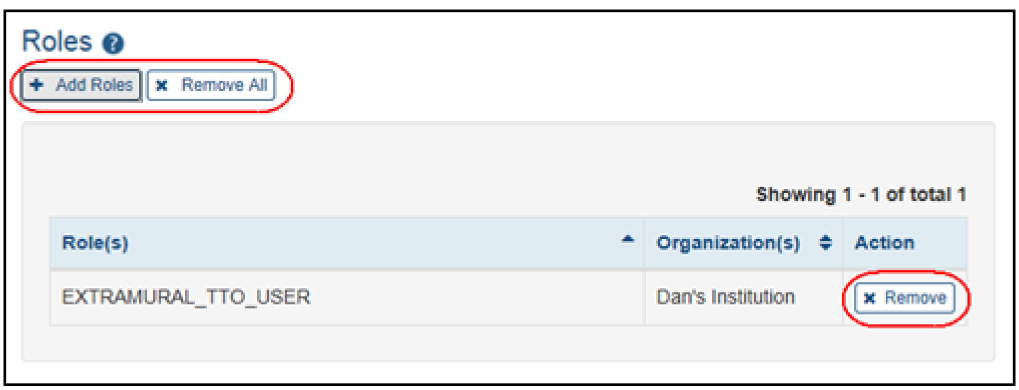


Figure 61: Roles Section on the Create Accounts Screen for External iEdison Users

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.

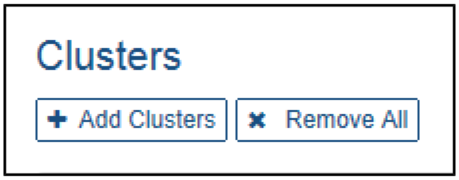


Figure 62: Clusters Buttons

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

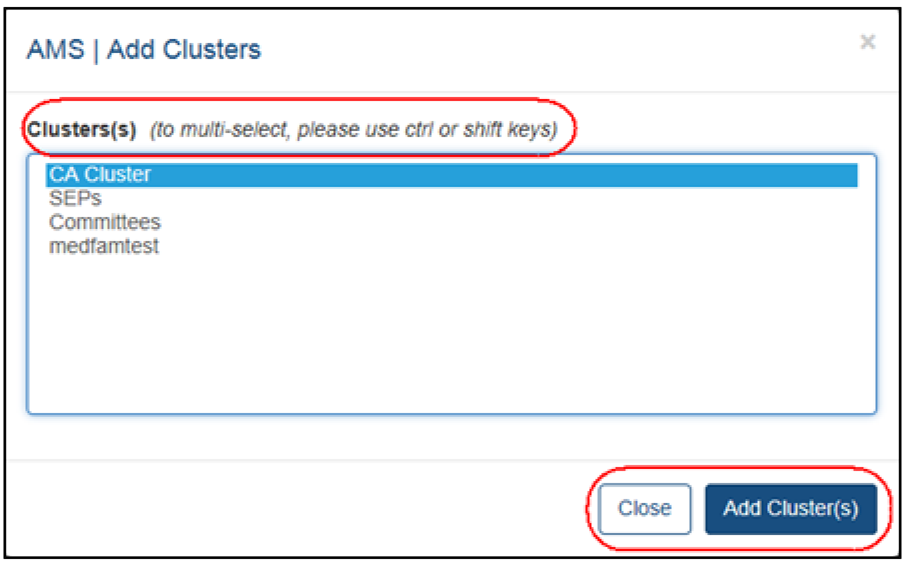


Figure 63: AMS | Add Clusters Screen

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.

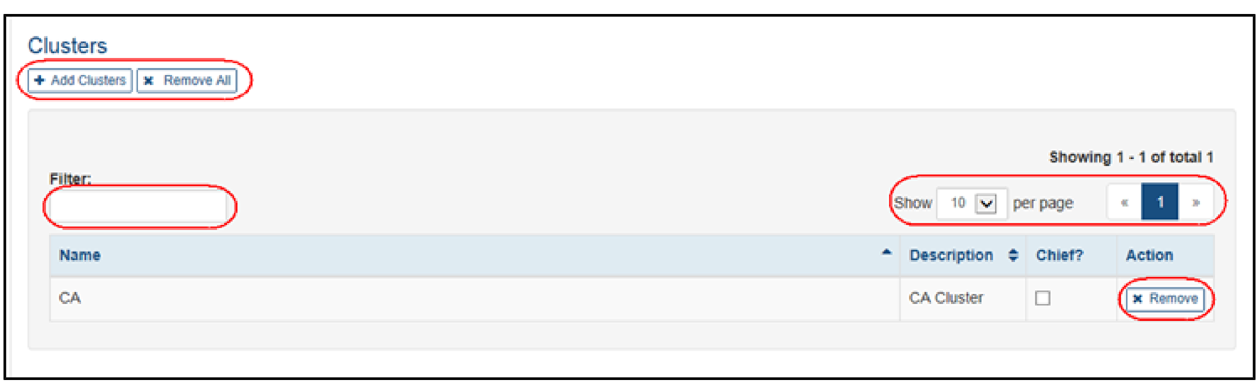


Figure 64: Clusters Section on the Create Account Screen

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.

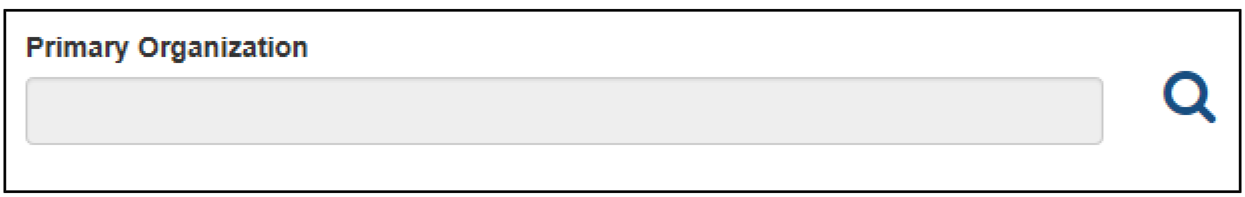


Figure 65: Primary Organization Field

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 opens.

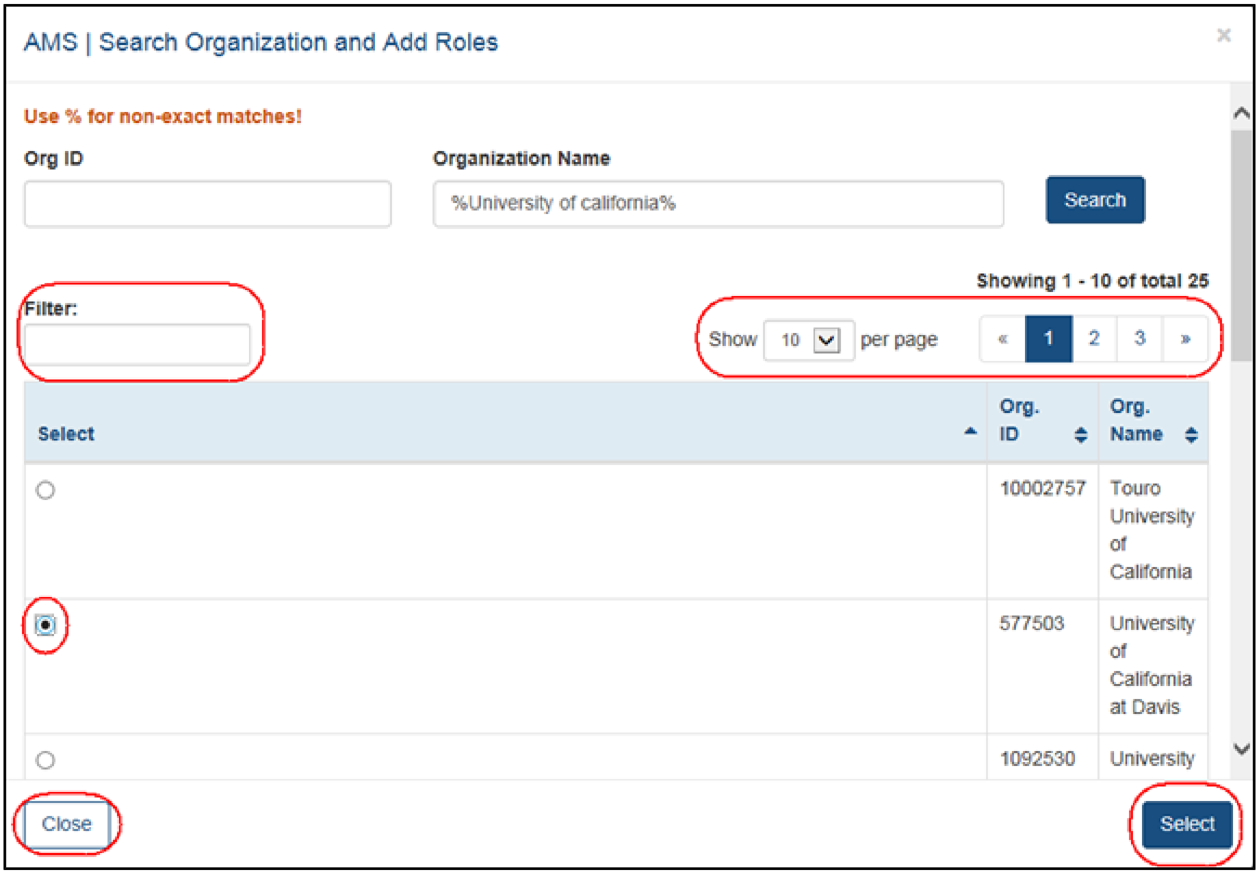


Figure 66: Search Organization and Add Roles Screen

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 can upload the NIH 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 can be a Word or PDF document and the size limit is 35MB.

You can download the preferred NIH Account Request formfrom the Inside eRA Point of Contacts page, or click this link to download it directly: https://inside.era.nih.gov/files/Data-Access-Request-Form.pdf.

http://inside.era.nih.gov/files/Data-Access-Request-Form.pdf

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

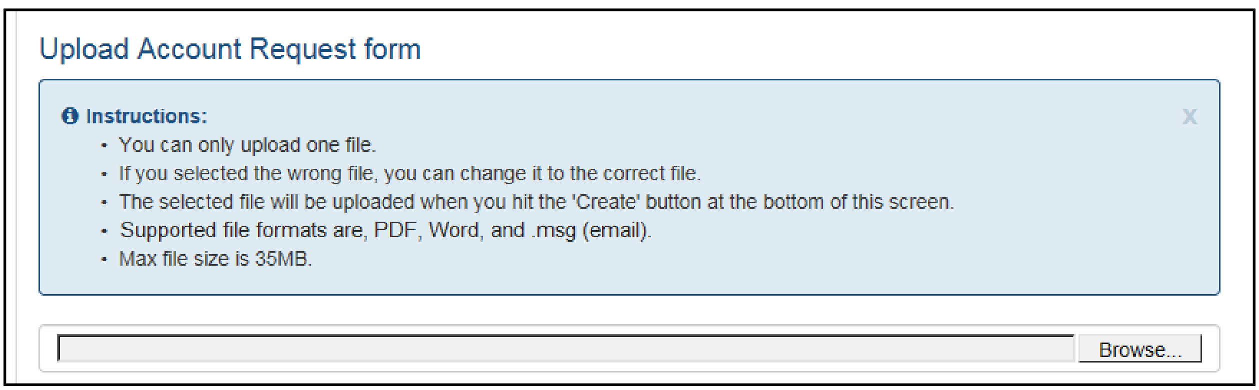


Figure 67: Upload Account Request Form Section on Create Account Screen

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.

5.1.8 Upload Account Request Form

Institute/Center (IC) Coordinators now have the ability to upload a new or replacement *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:

- This form is mandatory when creating a new user account.
- The form must be a Word, PDF, or .msg (email) document and the size limit is 35MB.

If using the Account Request form, it can be accessed on the *Inside eRA Point of Contacts* web page via this hyperlink https://inside.era.nih.gov/files/Data-Access-Request-Form.pdf.

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

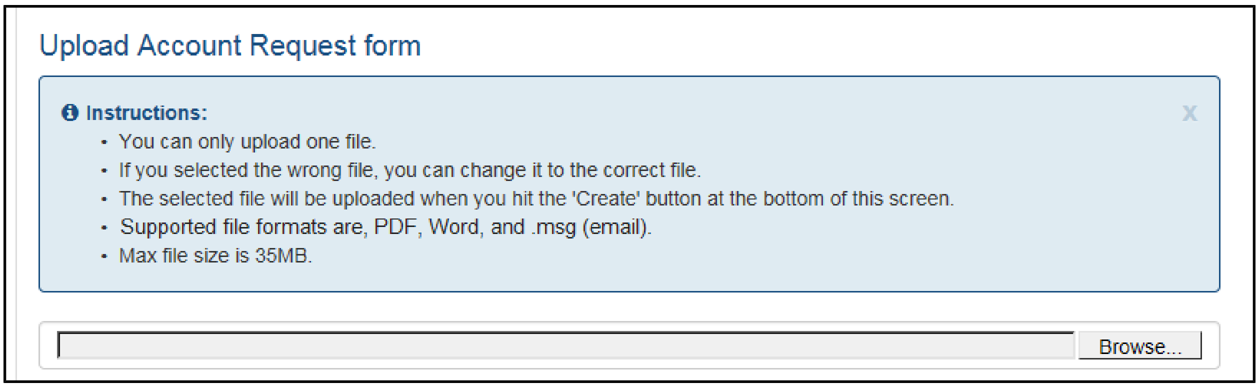
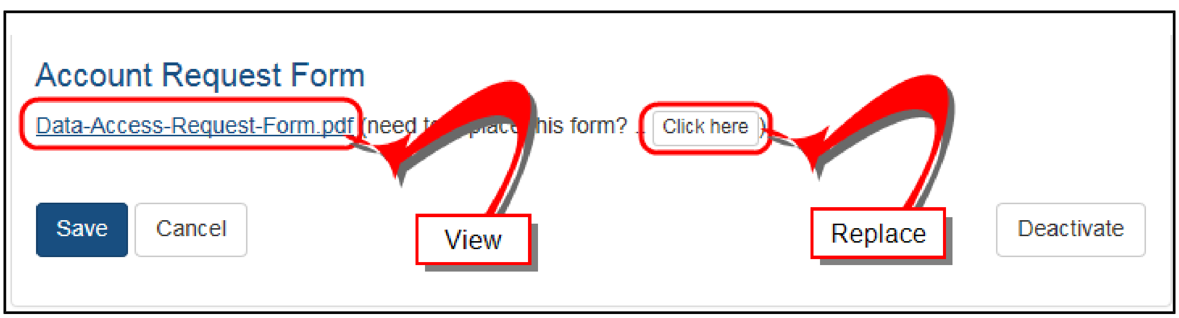


Figure 68: Upload Account Request Form Section on Create Account Screen

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.
3. Click on the Create button to finish.
4. To replace the Account Request form, find the account in the Account Management System, click the "Manage" button in the Actions Column, and proceed to the bottom of the page. You will then have the option to view the existing document and to replace it if necessary. (click to view)



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

NOTE: To upload a new or replacement account request form for an existing account, see Manage Account Request Forms.

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.

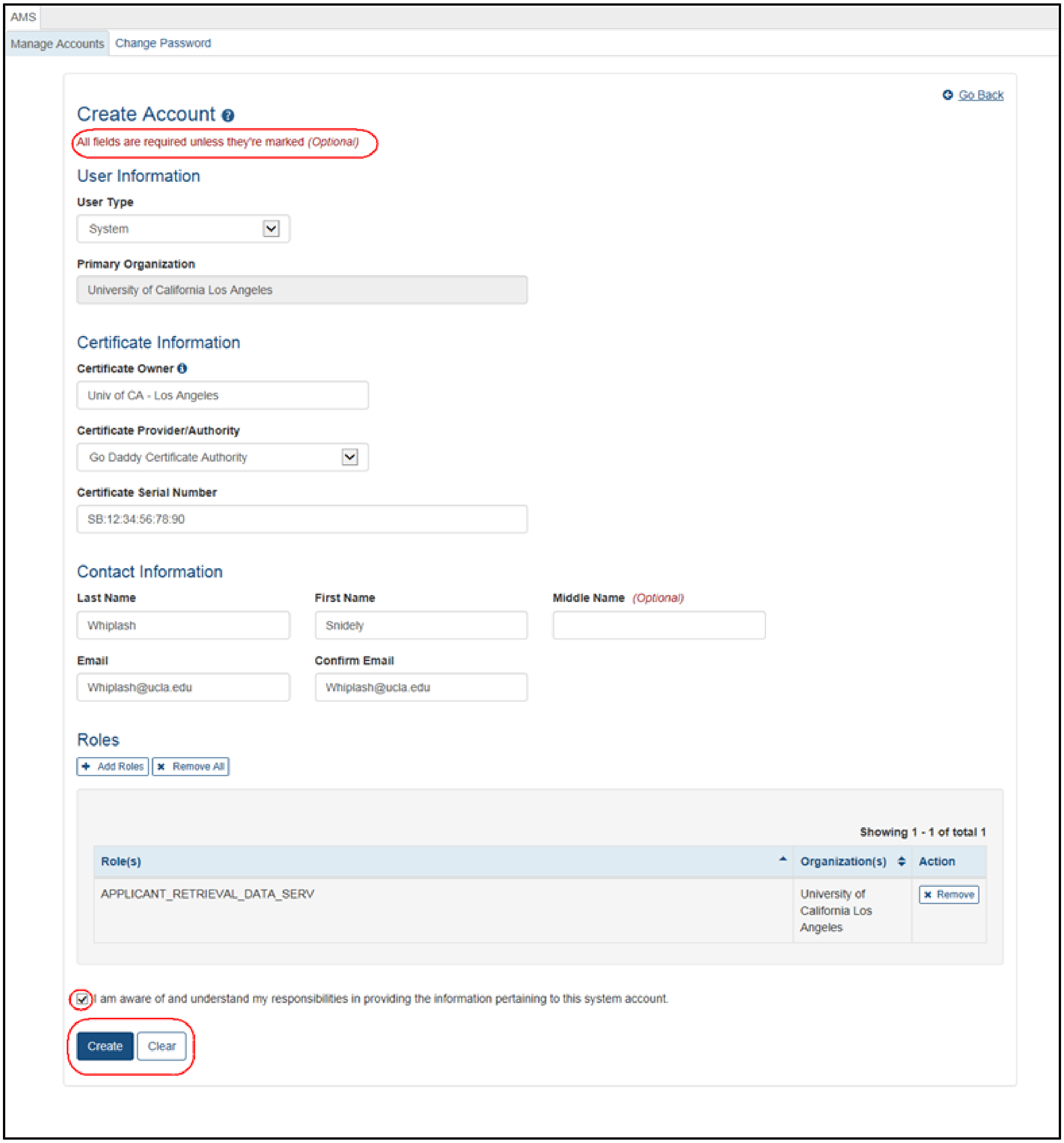


Figure 69: Create Account Screen Displaying Creating a System Account

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!*

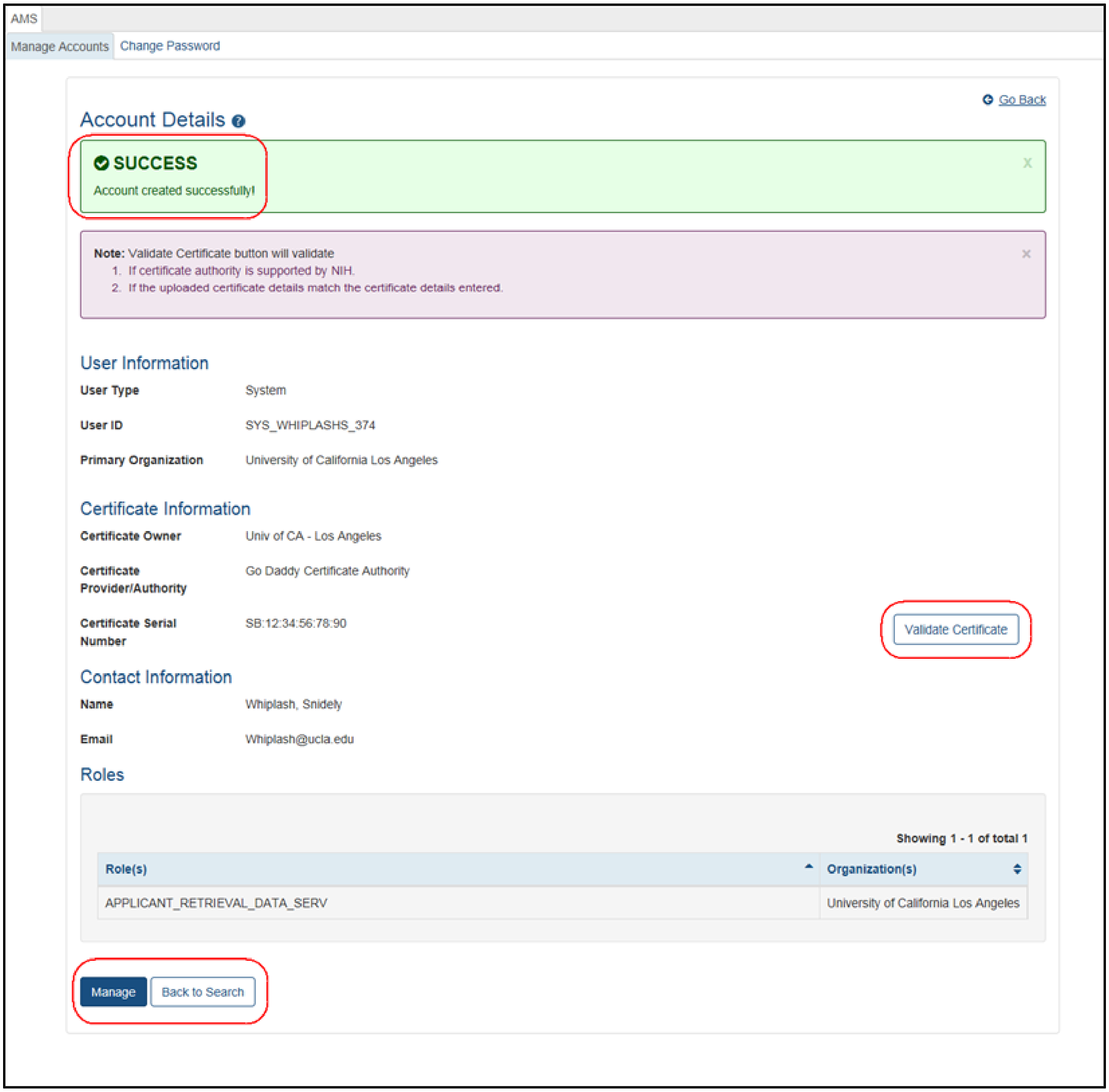


Figure 70: Create Account Screen Displaying Account Created Message

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.

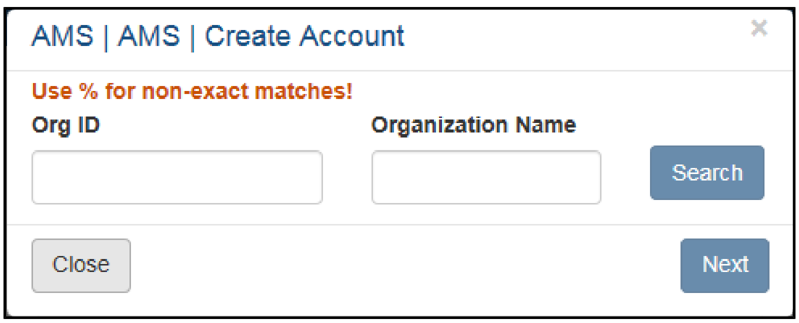
5.2.1 Add/Delete System Roles

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

1. To add system roles to the account, click the + **Add Roles** button on the *Create Accounts* or *Manage Accounts* screen:

2. Alternatively, eRA Service Desk agents can click the **Add Roles to Other org** button to give the account roles in another organization, as shown here.

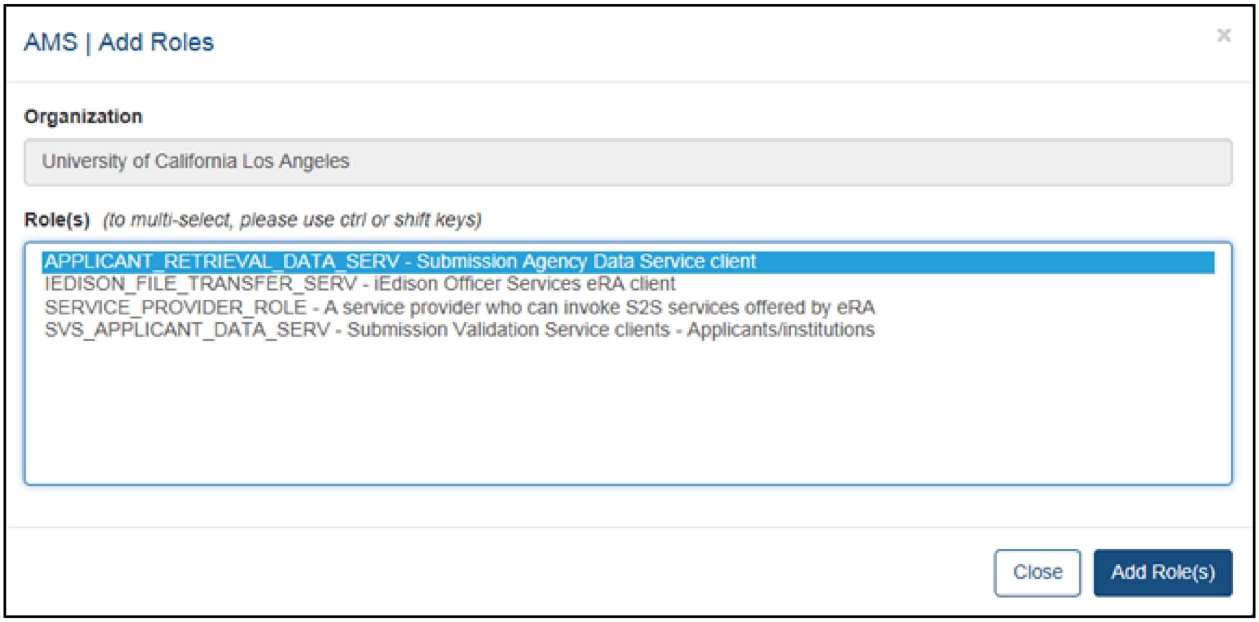
    - When the + **Add Roles to other org.** button is clicked, a pop-up search window opens so you can search for and select the other organization, as shown here:

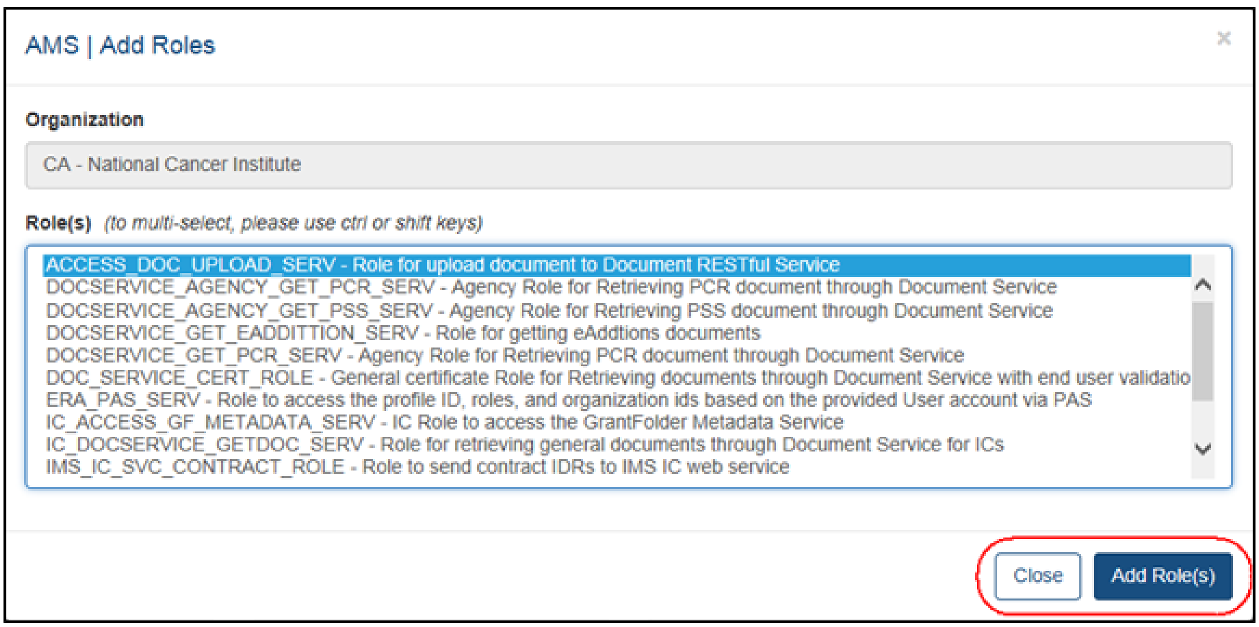
    Select the other organization in this window and click **Next** to proceed to the *Add Roles* screen described below.

3. When you click the + **Add Roles** button, the *Add Roles* screen opens, as shown below.

Add Roles screen, external users

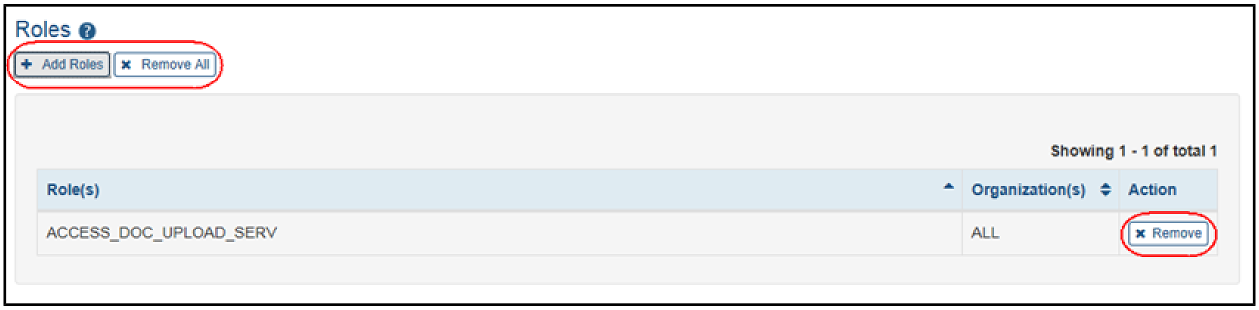


Add Roles screen, agency users



In the Add Roles screen:

1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.
3. 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), as shown here.



a. To add additional roles, click the **+ Add Roles(s)** button in this screen and then repeat the procedure described above.
b. To remove a role click the appropriate **Remove** button in the **Action** column.
c. 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.

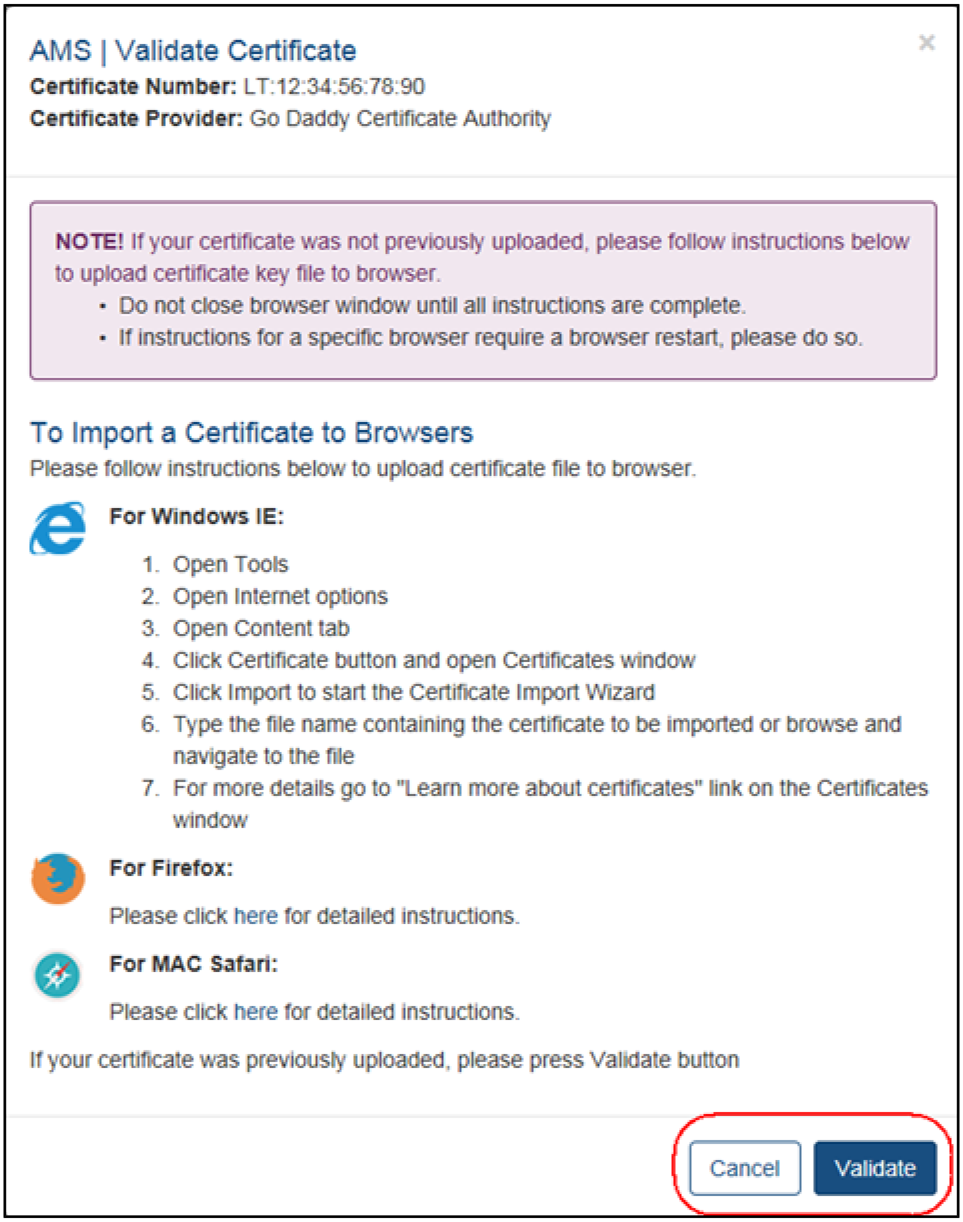


Figure 71: Validate Certificate Screen

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 opens:

> *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*.

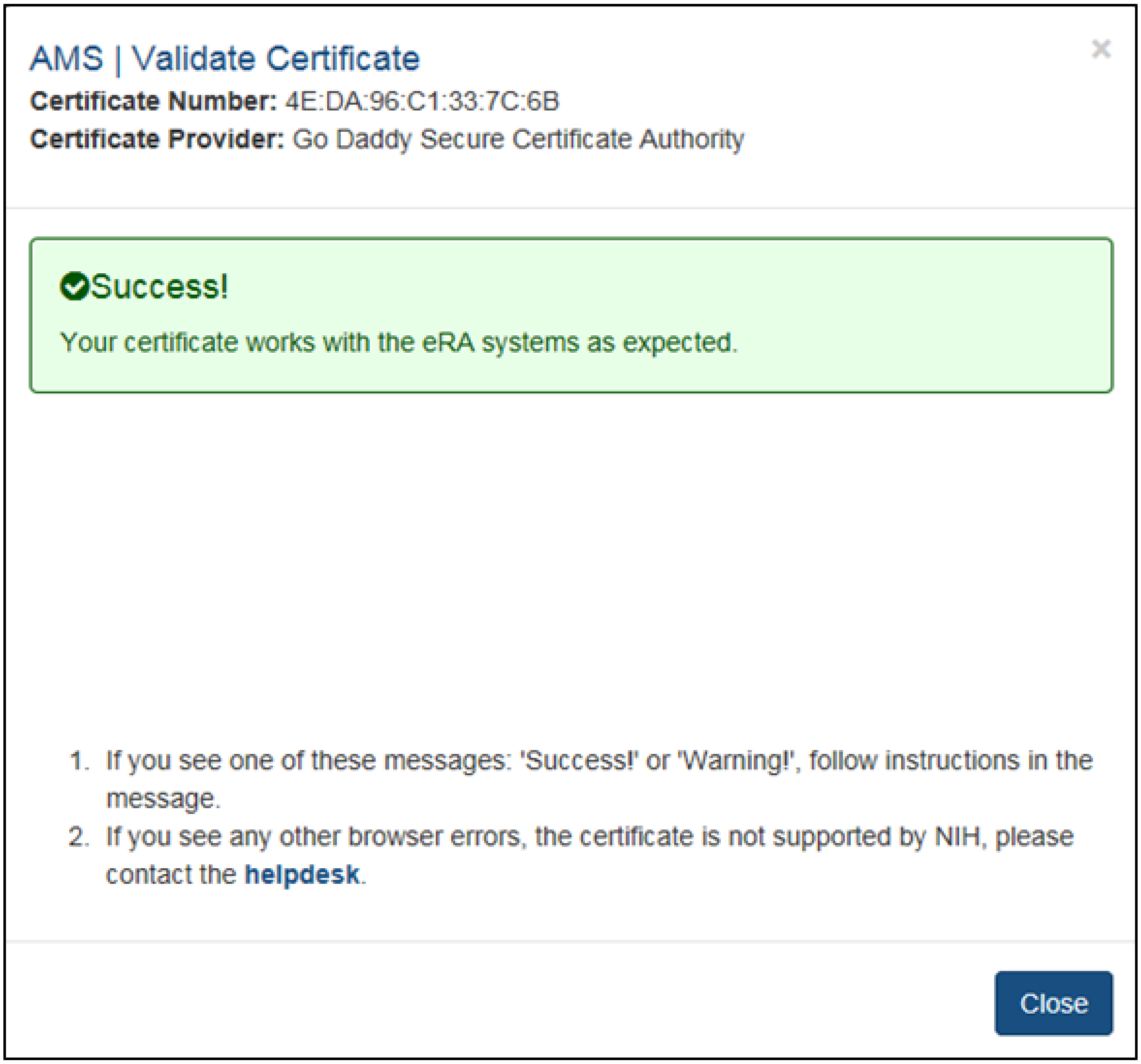


Figure 72: Validate Certificate Screen Displaying the Success Message

2. Click the **Close** button to close the screen.

The following audit information is audited and stored in the database:

- 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

Perform one of these actions to open an account for editing in the *Manage Accounts* screen:

- Click the **Manage** button in the **Action** column of the Search Accounts screen.
- Click the **Manage** button on the *Account Details* screen after an account has been created or edited.

When you click the **Manage** button, the *Manage Accounts* screen opens.

Here is the *Manage Account* screen for an account that is not affiliated with an Agency or Institute:

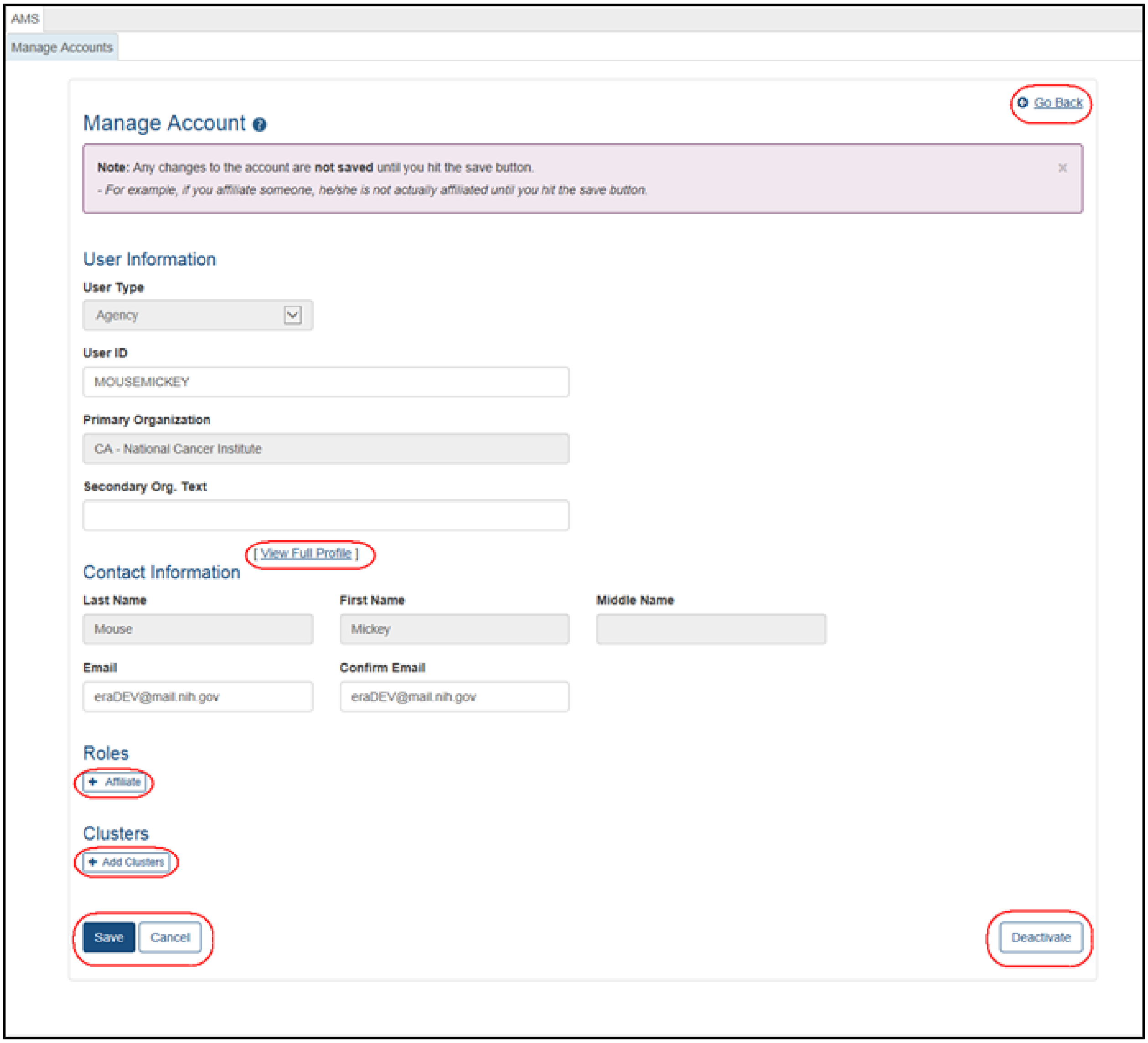


Figure 73: Manage Account screen for unaffiliated account

Here is the *Manage Account* screen for an account that is affiliated with an Agency or Institute.

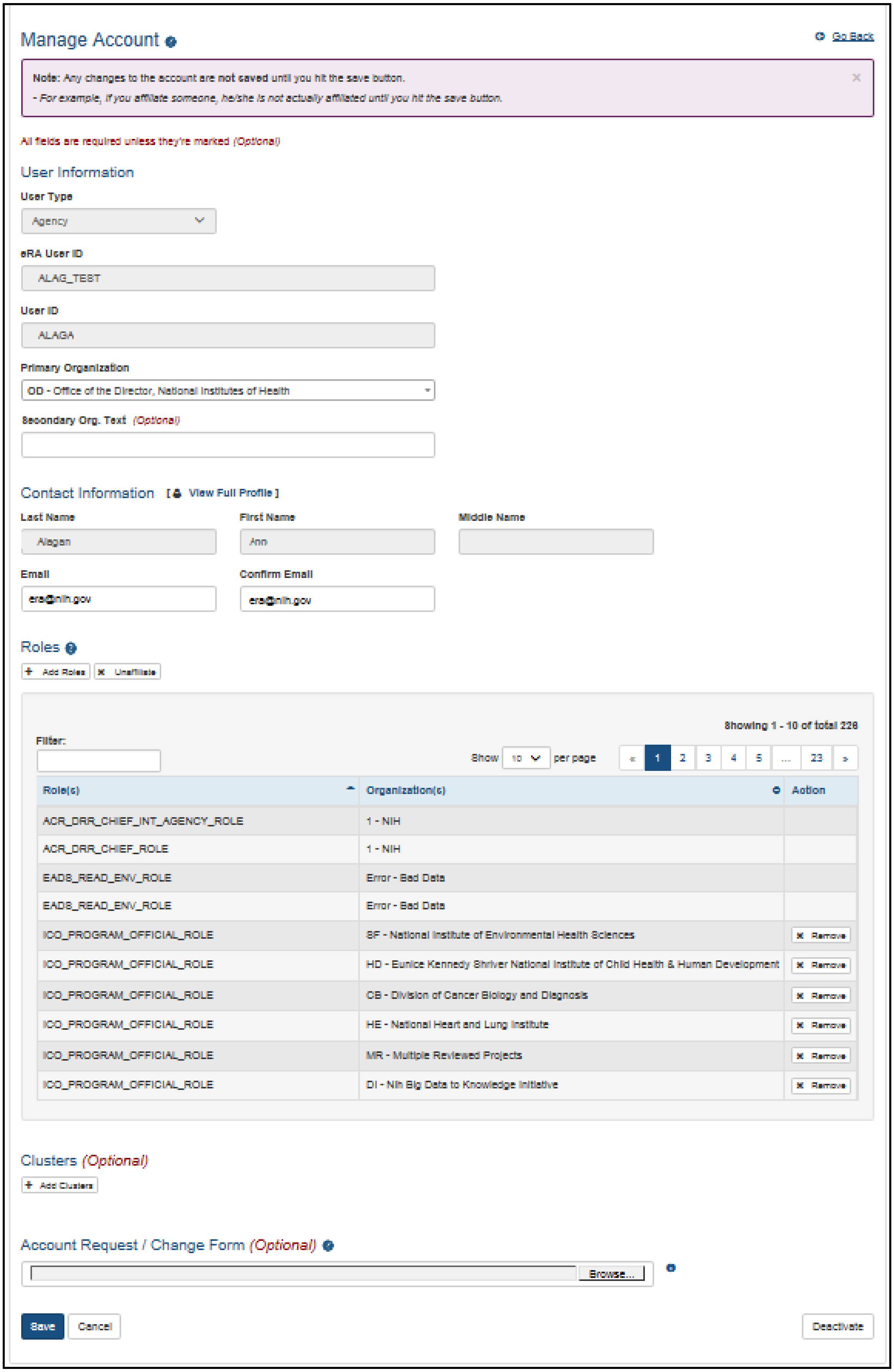

Manage Account
Go Back
Note: Any changes to the account are not saved until you hit the save button.
- For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.
All fields are required unless they're marked (Optional)
User Information
User Type
Agency
eRA User ID
ALAG_TEST
User ID
ALAGA
Primary Organization
OD - Office of the Director, National Institutes of Health
Secondary Org. Text (Optional)
Contact Information
[View Full Profile]
Last Name
Alagan
First Name
Ann
Middle Name
Email
era@nih.gov
Confirm Email
era@nih.gov
Roles
Add Roles
Unaffiliate
Showing 1 - 10 of total 228
Filter:
Show 10 per page
« 1 2 3 4 5 ... 23 »
Role(s)
Organization(s)
Action
ACR_DRR_CHIEF_INT_AGENCY_ROLE
1 - NIH
ACR_DRR_CHIEF_ROLE
1 - NIH
EADS_READ_ENV_ROLE
Error - Bad Data
EADS_READ_ENV_ROLE
Error - Bad Data
ICO_PROGRAM_OFFICIAL_ROLE
SF - National Institute of Environmental Health Sciences
Remove
ICO_PROGRAM_OFFICIAL_ROLE
HD - Eunice Kennedy Shriver National Institute of Child Health & Human Development
Remove
ICO_PROGRAM_OFFICIAL_ROLE
CB - Division of Cancer Biology and Diagnosis
Remove
ICO_PROGRAM_OFFICIAL_ROLE
HE - National Heart and Lung Institute
Remove
ICO_PROGRAM_OFFICIAL_ROLE
MR - Multiple Reviewed Projects
Remove
ICO_PROGRAM_OFFICIAL_ROLE
DI - Nih Big Data to Knowledge Initiative
Remove
Clusters (Optional)
Add Clusters
Account Request / Change Form (Optional)
Browse...
Save
Cancel
Deactivate

Figure 74: Manage Account screen for affiliated account

you can create an affiliation for accounts that are either not currently associated with an institution, such as an account that has only 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 can create affiliations for their organization only.

You can perform the following actions in this screen:

- To view the profile, click **View Full Profile**.
    a. Please refer to the Person Administration topic in the Person Search online help for more information.
- Edit the User Information as needed. (Note that Fields that are grayed out cannot be edited.)
- To add roles click the **Add Roles**
    a. For more information, see Add Roles.
- To affiliate the account with an agency or IC, click **Affiliate**.
    a. For more information, see Affiliate Account.
- To remove one or more of the account's affiliations, click **Unaffiliate**.
- a. For more information, see Unaffiliate Account.
- To upload an Account Request/Change Form, click **Browse** and navigate to the file.
- a. For more information, see Manage Account Request Forms.
- To deactivate an account, click **Deactivate**.
    a. For more information, see Deactivate Account.

When you are finished in this screen, click **Save** to save the changes or click **Cancel** to discard the changes.

When you click **Save** button, the system displays the following confirmation message.

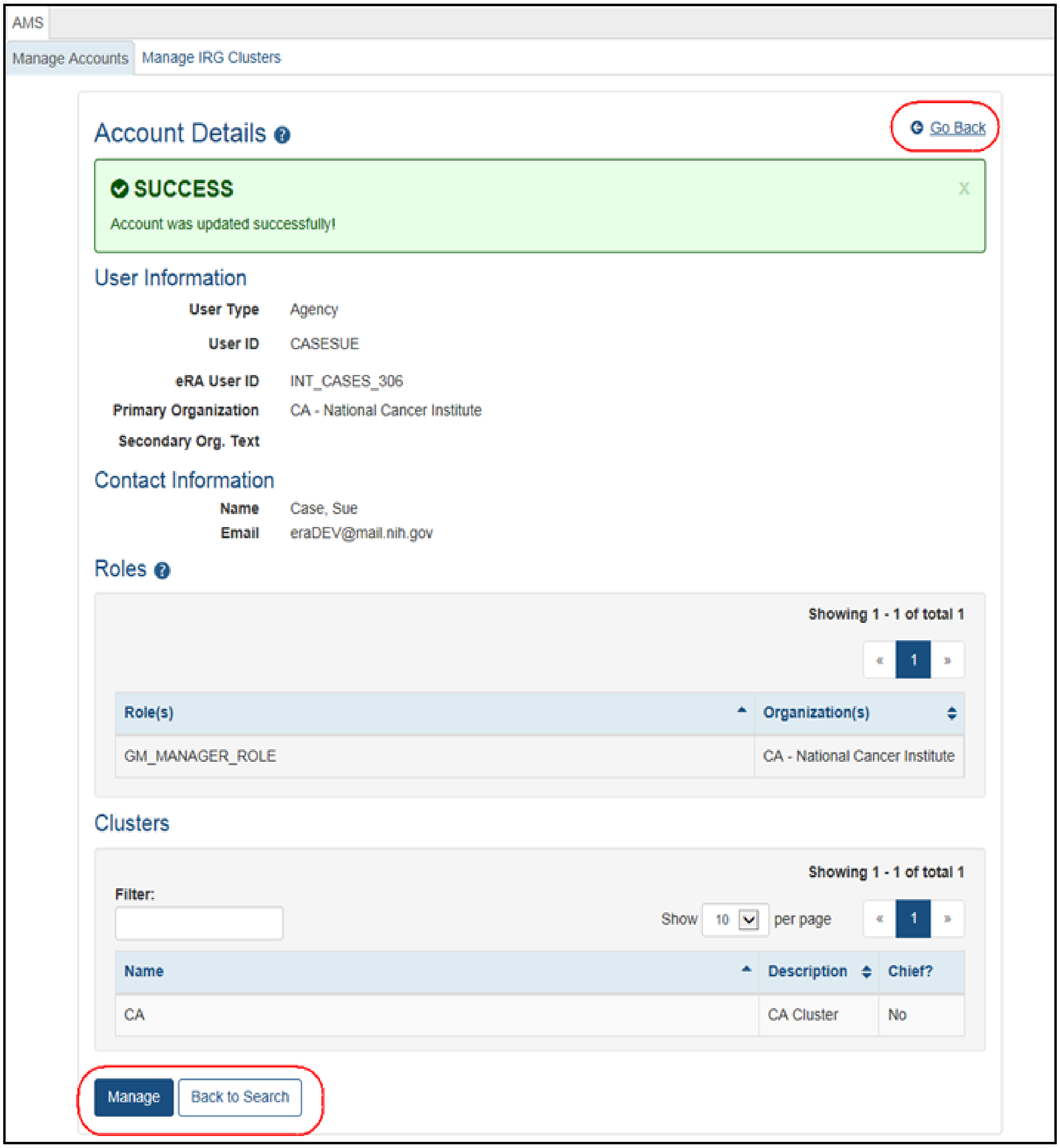


Figure 75: Account Details screen confirmation message

Other Actions:

- To return to the *Search Accounts* screen displaying the previous search results, click **Go Back** .
- To edit the account's information, click **Manage**.
- To return to the *Search Accounts* screen to enter new search criteria, click **Back to Search**.

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 opens.

Here is the Manage Account screen with an account not affiliated with an Organization or Institution.

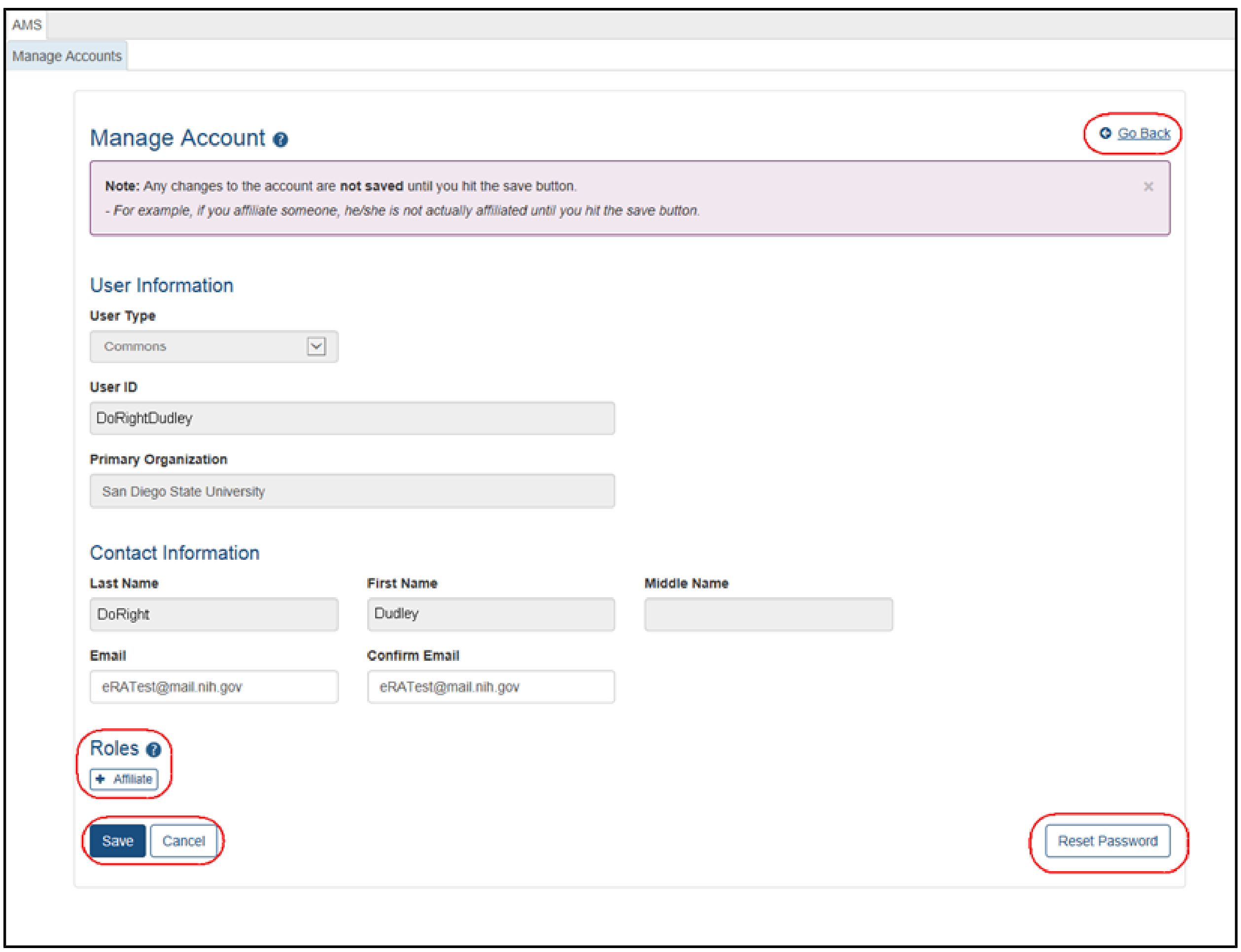


Figure 76: Manage Account Screen Displaying a Non-affiliated User Account

Here is the Manage Account screen with a user account affiliated with an Organization or Institute.

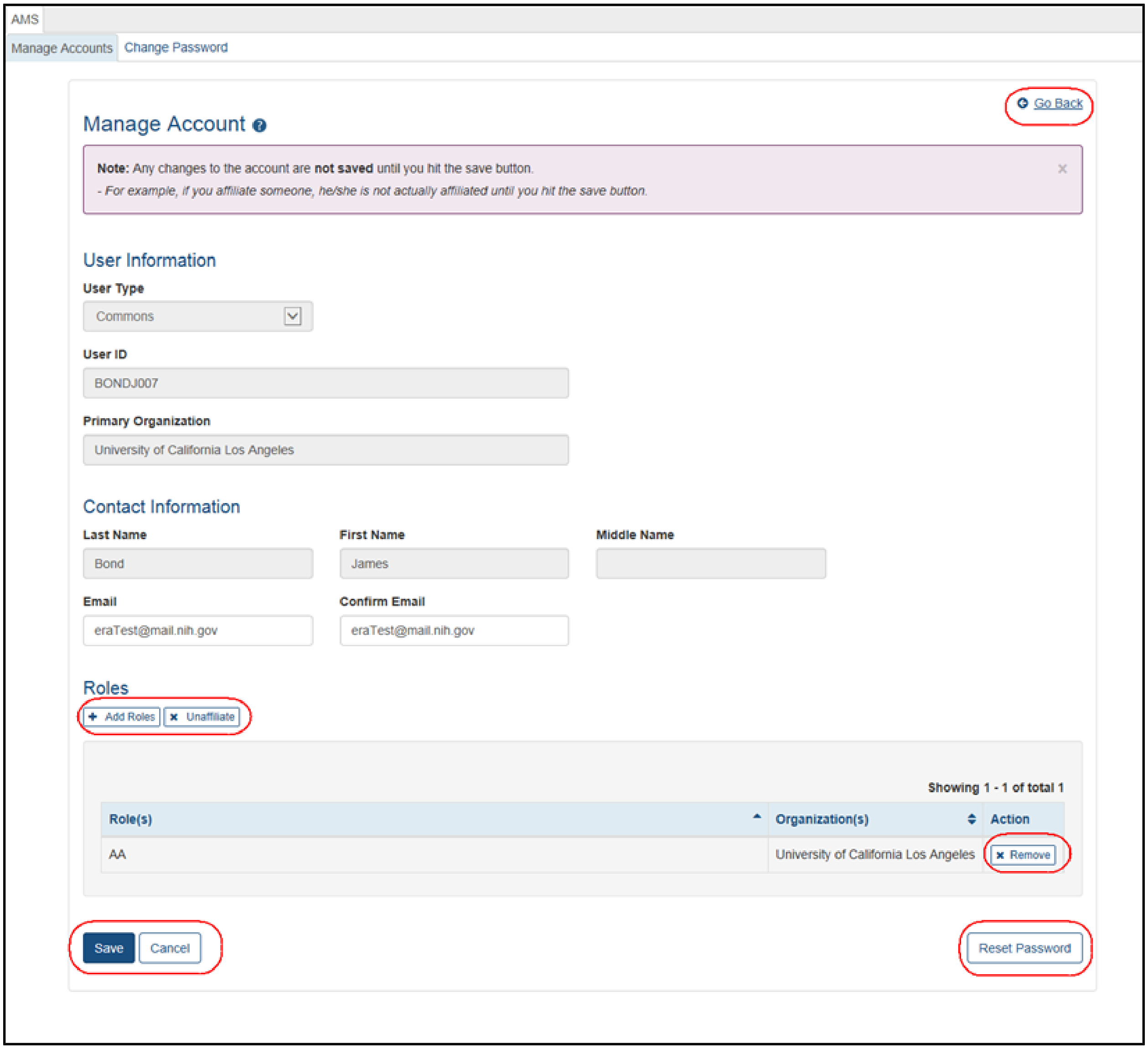


Figure 77: Manage Account Screen Displaying an Affiliated Account

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: Administrative roles such as SO, AA, AO, etc., cannot be combined with Scientific roles such as PI, TRAINEE, ASST, etc.

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 :

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!*.

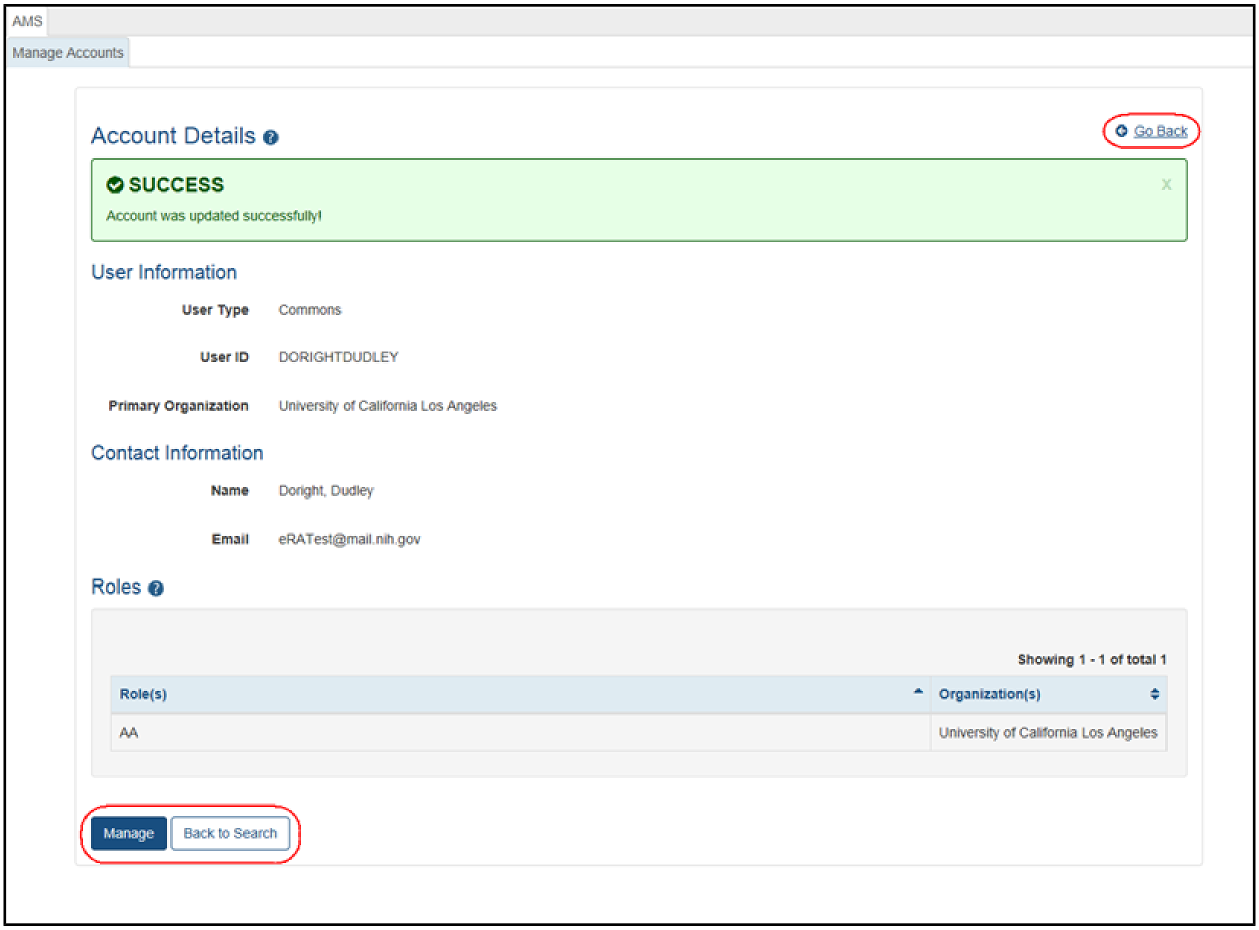


Figure 78: Account Details Screen Displaying Successful Message

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 opens.

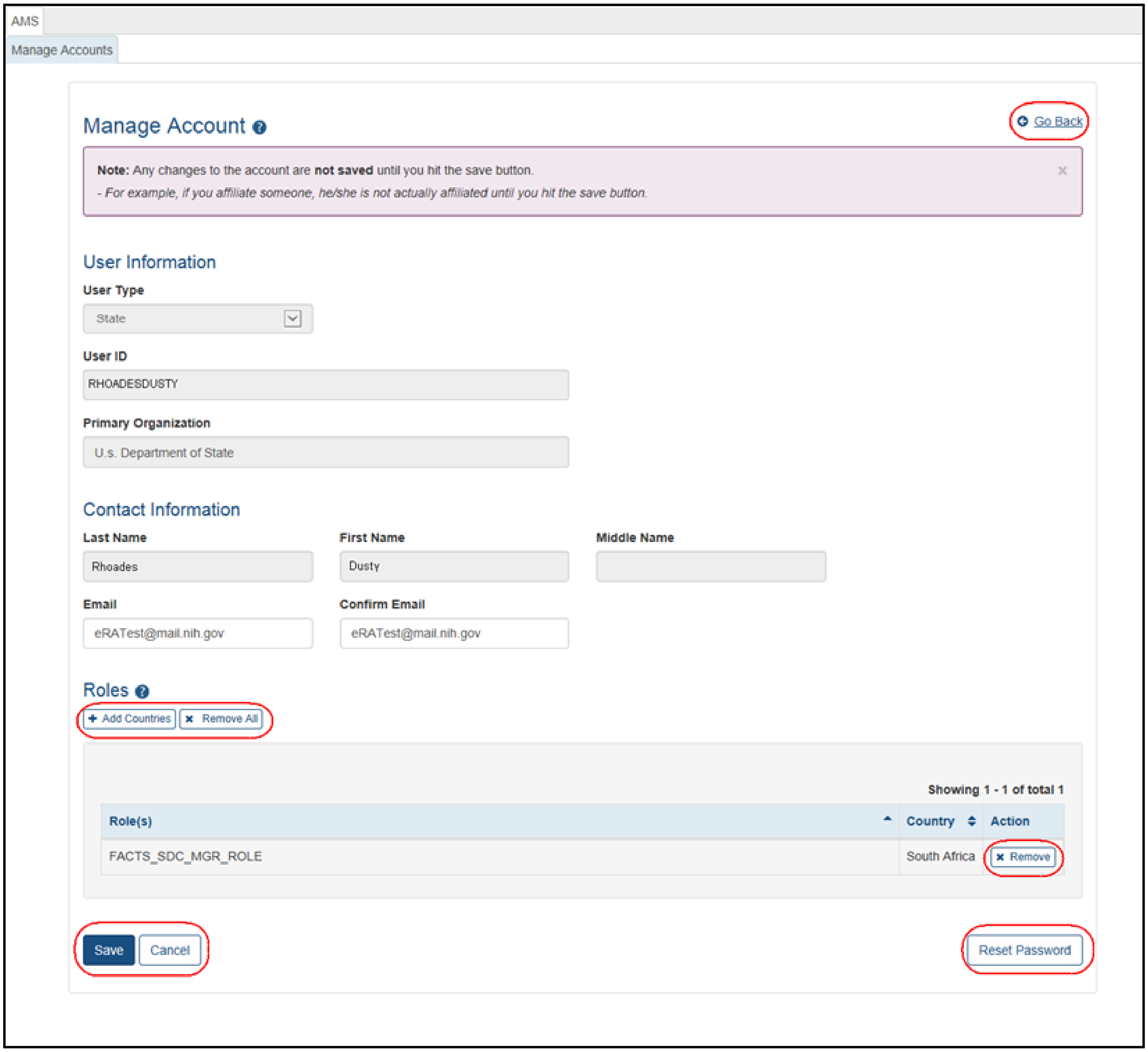


Figure 79: Manage Account Screen for State Department Users

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!*

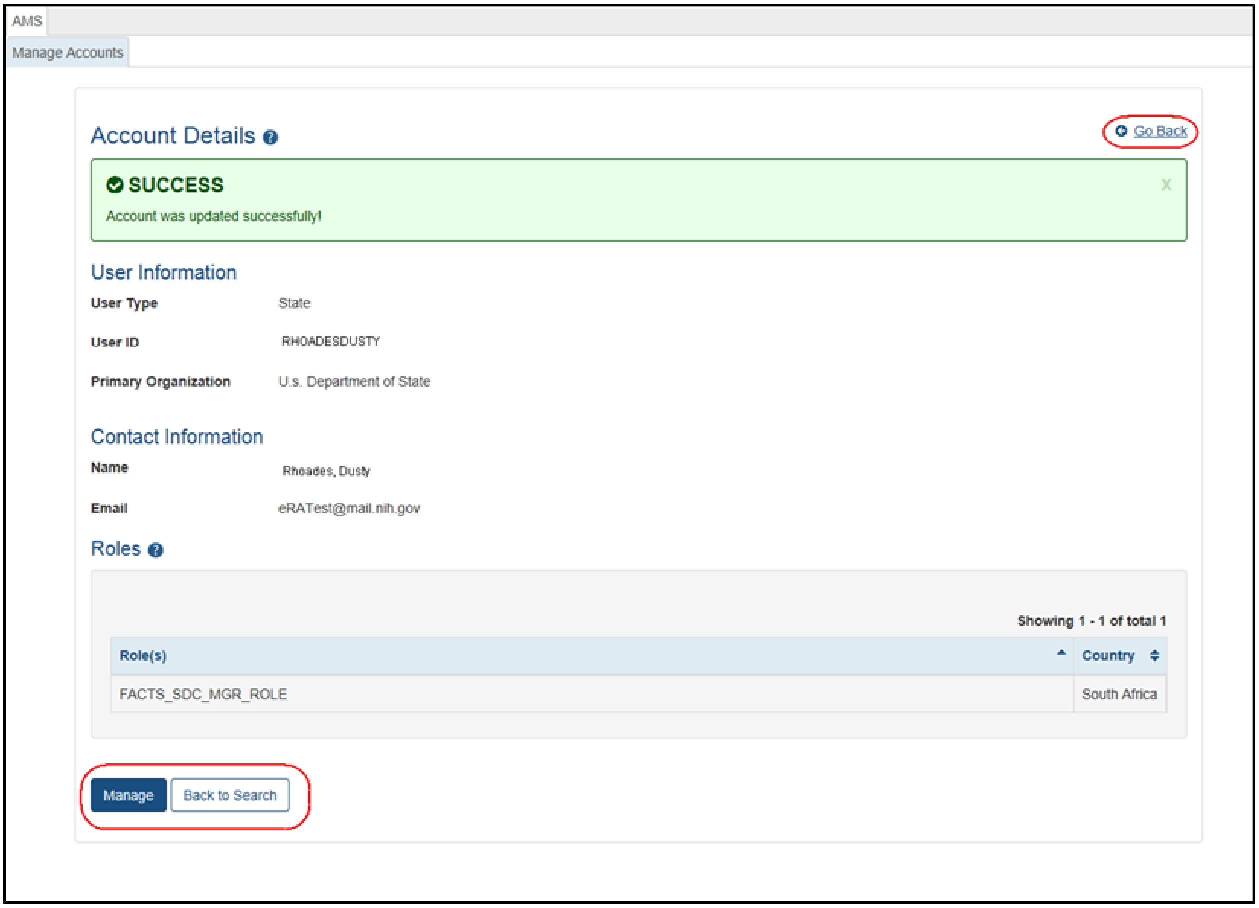


Figure 80: Account Details Screen for State Department Users

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.

6.3.4 Manage Account Request Forms

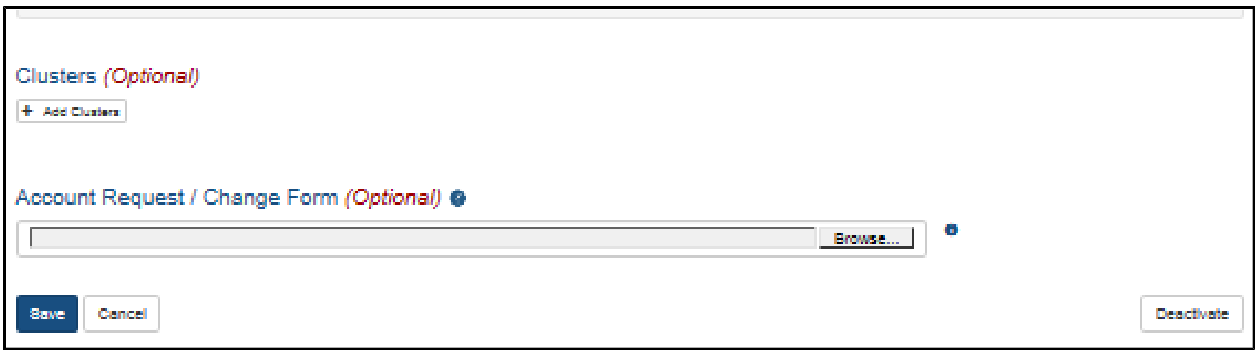
IC Coordinators now have the ability to upload new or revised account request forms from the Manage Account screen.

Guidelines:

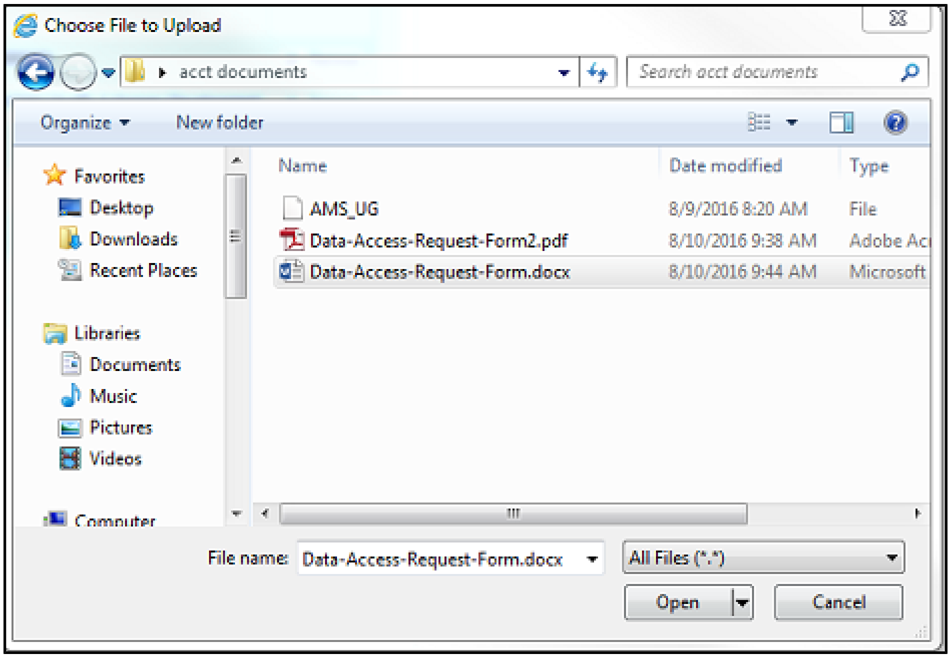
- The form must be a Word, PDF, or .MSG (email) document and the size limit is 35MB.
- You can use the standard NIH Data Access Request Form or another account request document as required by your IC.
  - Download the NIH Data Access Request Form here: https://inside.era.nih.gov/files/Data-Access-Request-Form.pdf.

Follow these steps to upload an account request form:

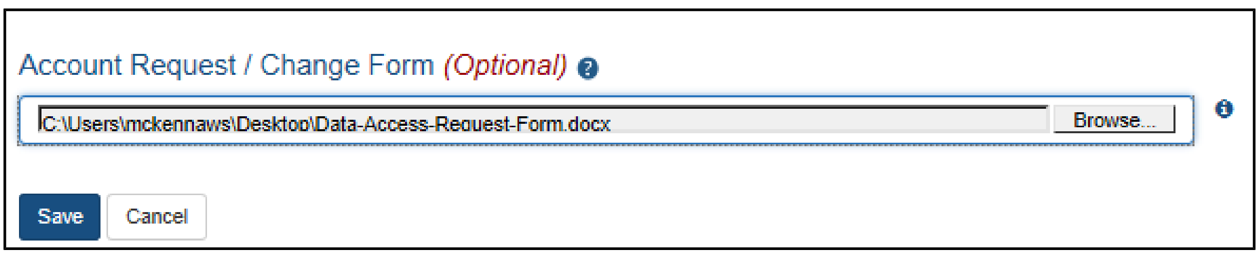
1. Open the account in the the Manage Account screen.
2. Click the **Browse** button at the bottom of the *Manage Account* screen, as shown here:



3. Navigate to the document you want to upload and click **Open**, as shown here:

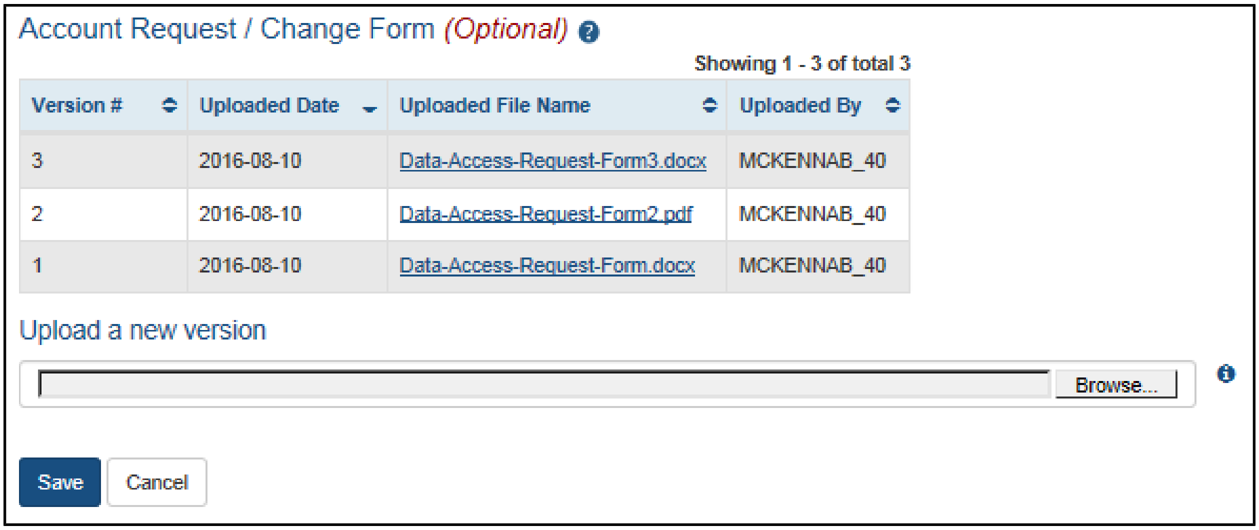


4. The file you selected appears in the Account Request/Change Form text box, as shown here:



5. Click **Save** to upload the file; or click **Browse** to select a different file, or click **Cancel** to cancel the upload.

When you click **Save**, the system displays a confirmation message and the uploaded file appears in the *Account Request/Change Form* display, as shown here:



Account Request / Change Form *(Optional)*

Showing 1 - 3 of total 3

Version #	Uploaded Date	Uploaded File Name	Uploaded By
3	2016-08-10	Data-Access-Request-Form3.docx	MCKENNAB_40
2	2016-08-10	Data-Access-Request-Form2.pdf	MCKENNAB_40
1	2016-08-10	Data-Access-Request-Form.docx	MCKENNAB_40

Upload a new version

Browse...

Save Cancel

If one or more account request forms have been uploaded previously, they will be listed in this display with a sequential version number, the upload date, the file name and the name of the user who uploaded the file.

6.3.4.1 Other Actions

- To view an uploaded form, click on the file name.
- To upload a new version of the form, click the **Browse** button and repeat the above procedure.

6.4 Manage System Accounts

Modifying system accounts can be performed by Commons, Agency, and external iEdison users.

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.

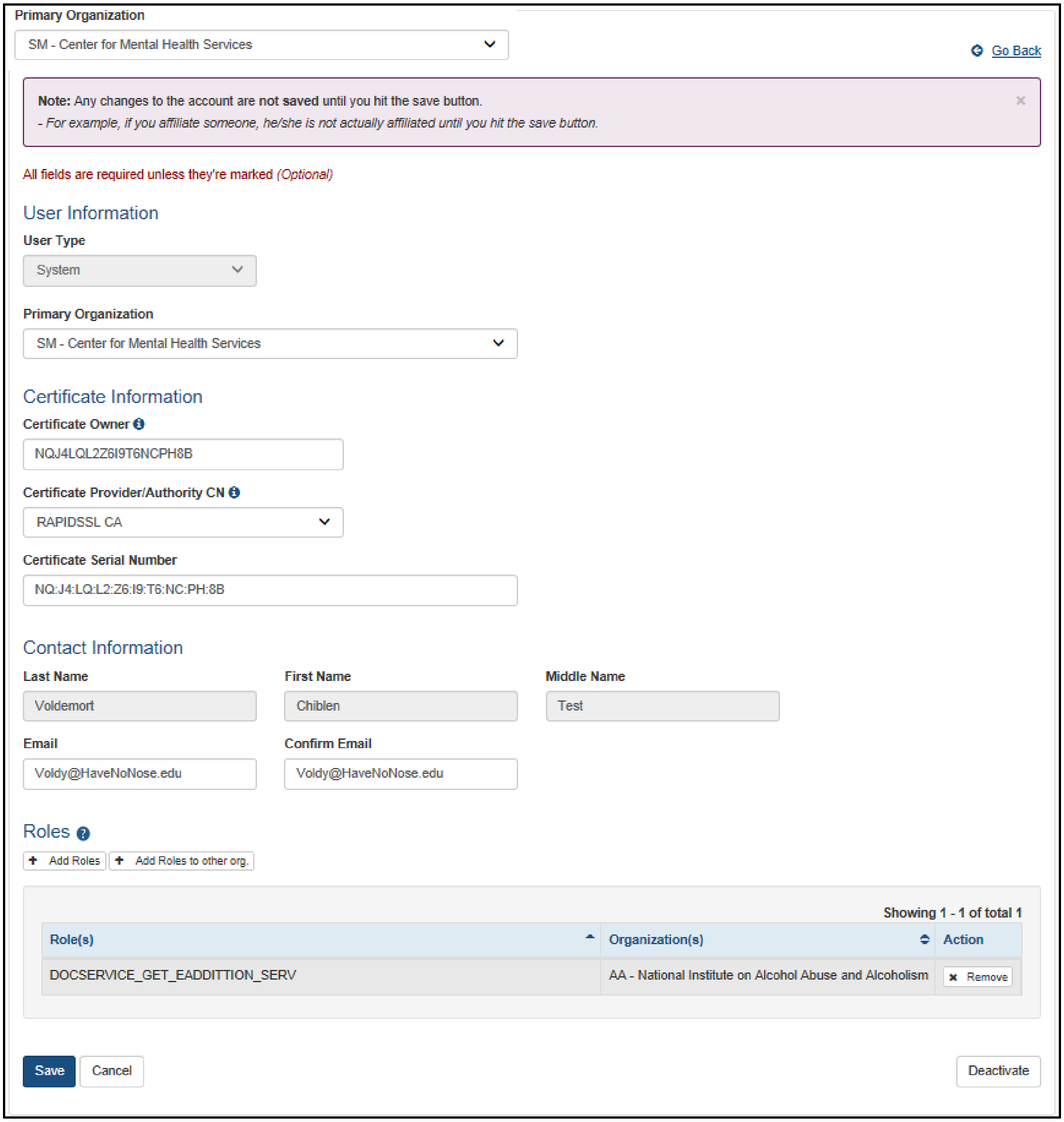


Figure 81: Manage Account Screen for Commons Management Staff

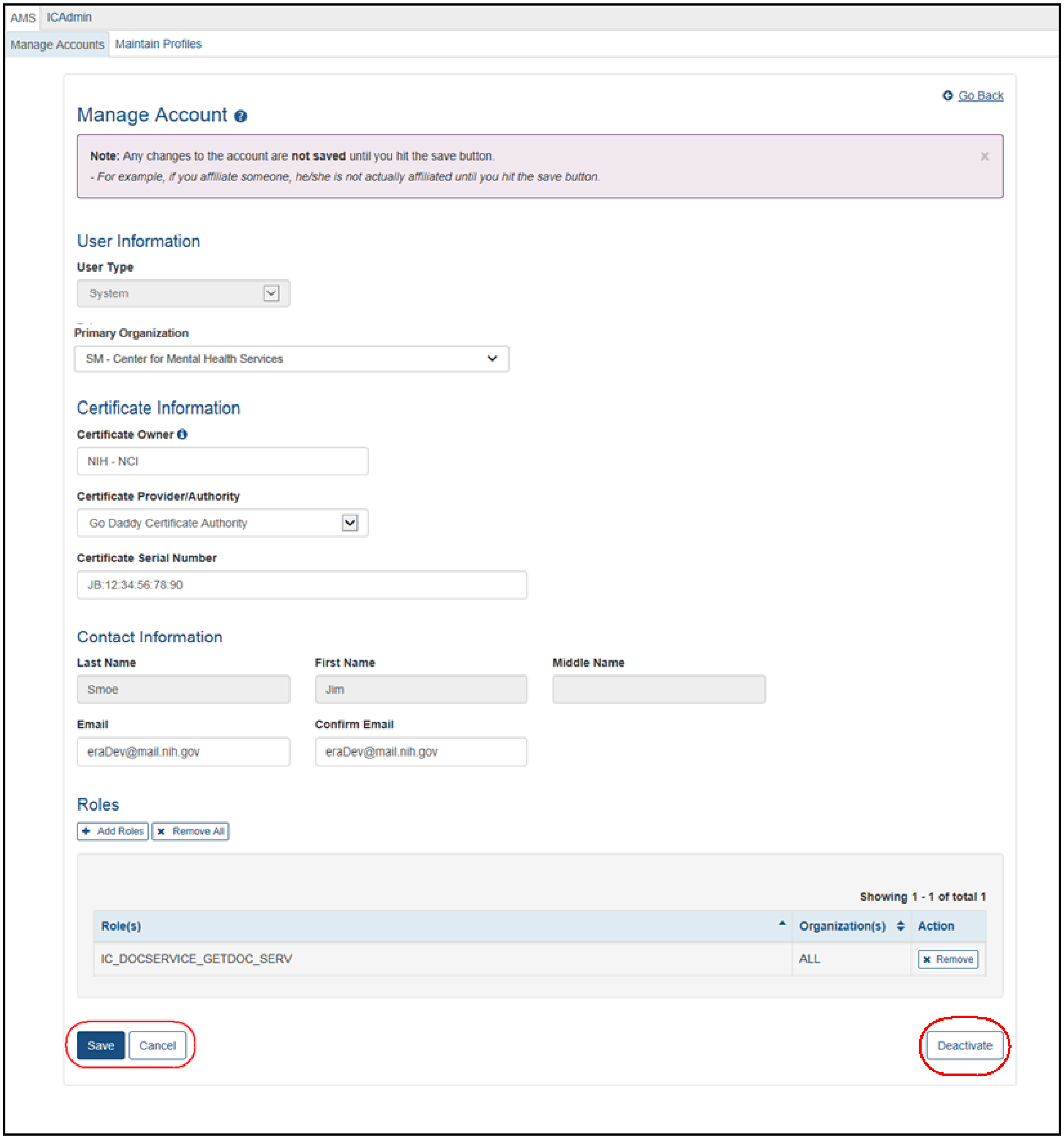


Figure 82: Manage Account Screen for Agency Management Staff

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 opens.

When the **Save** button is clicked, the *Account Details* screen displays with the following message: *Account created successfully*.

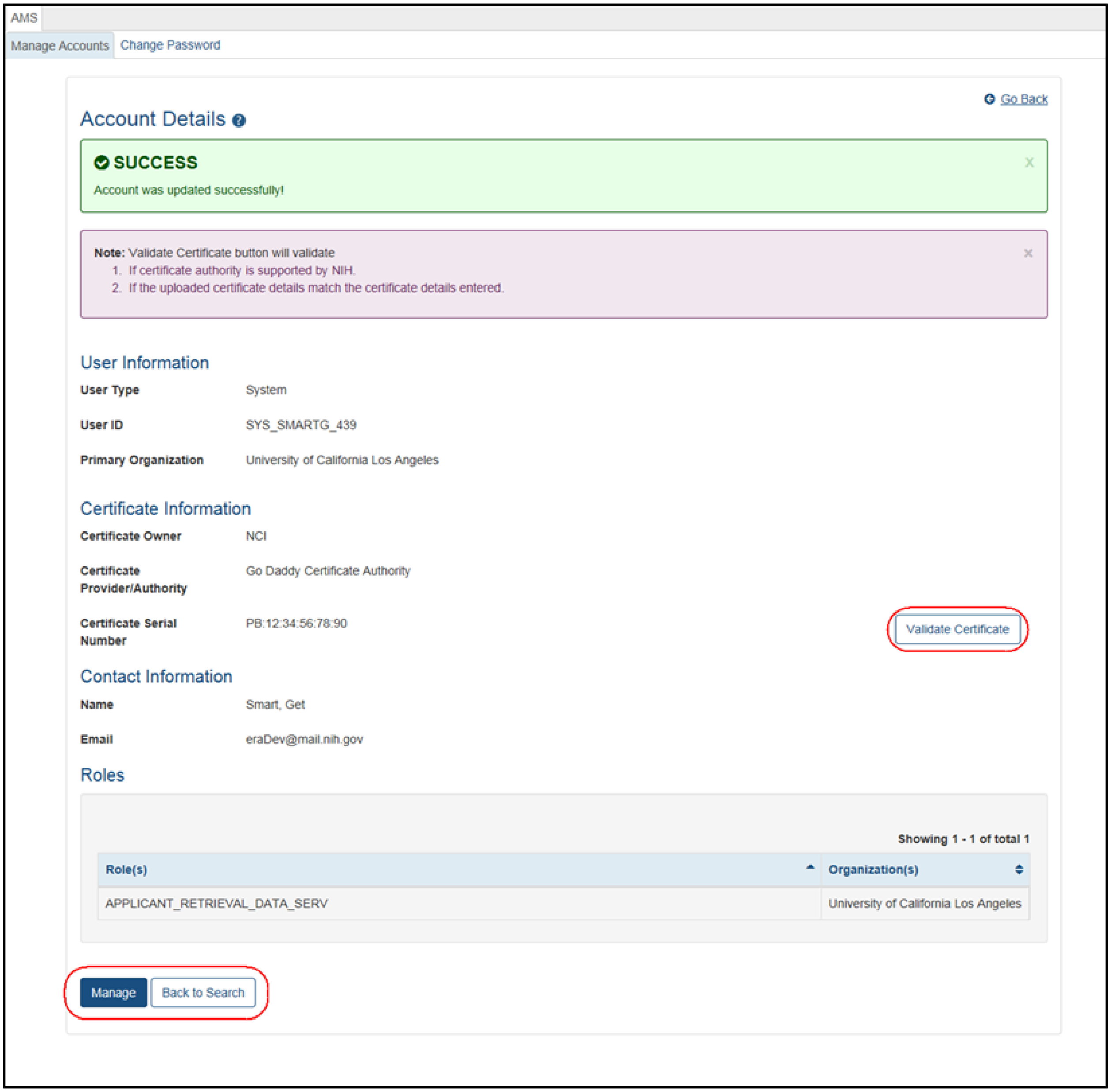


Figure 83: Account Details Screen for Commons Management Staff

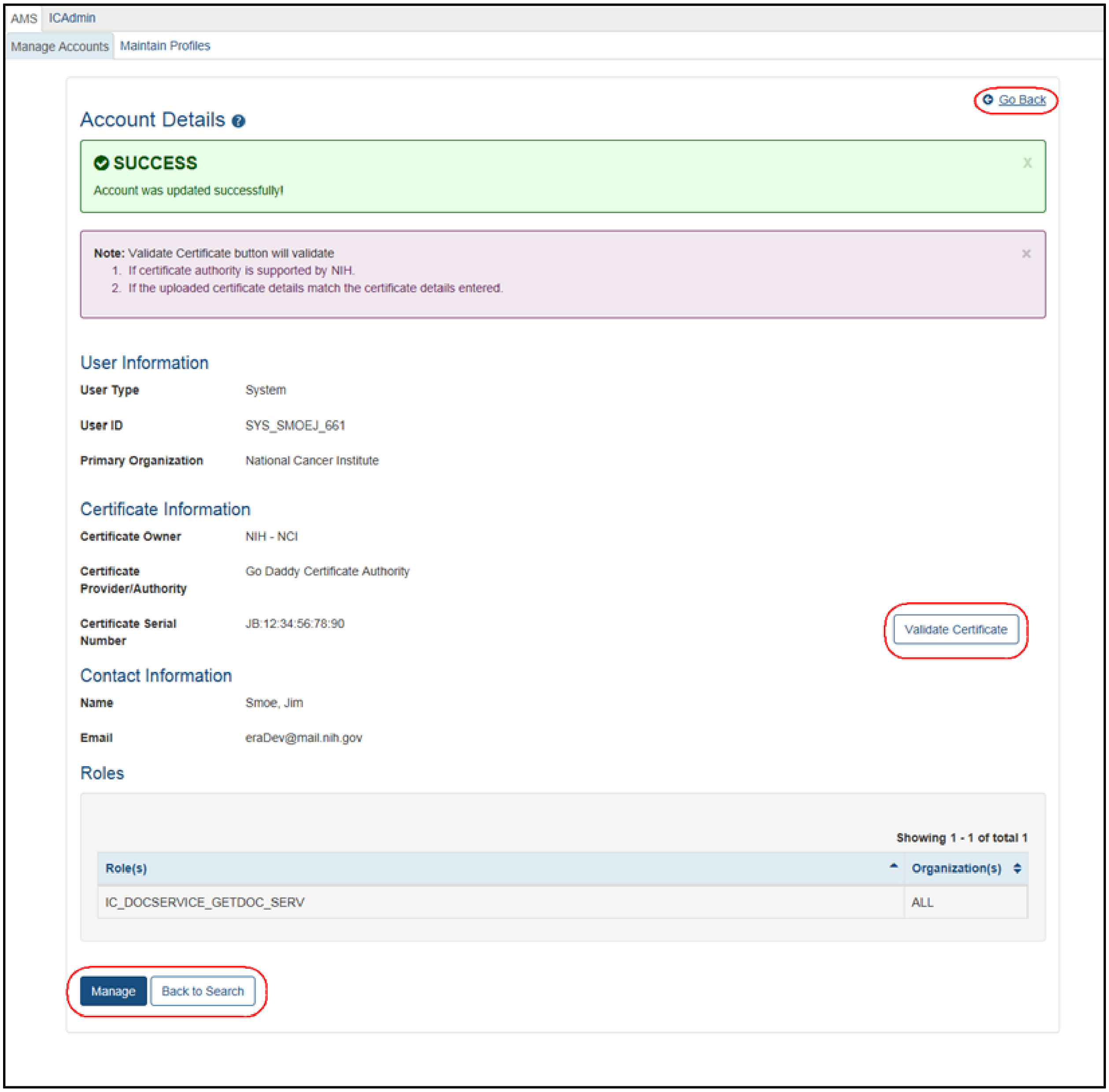


Figure 84: Account Details Screen for Agency Management Staff

9. 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 Add/Delete User Roles

NOTES:

- The list of roles displayed is dependent on the logged in user's role.
- Accounts with scientific roles should be maintained for the career of the scientist and affiliations should be added as necessary.
- Administrative roles cannot be combined with scientific roles on the same user account and accounts with administrative roles cannot be affiliated with more than one institution.
- State Department users only - For information on adding countries, please refer to the Add/Delete Countries topic.

1. To add user roles to an account, click the + **Add Roles** button on the *Create Account* or *Manage Account* screen.
2. The Add Roles button lets you add user roles within the account-holder's organization.
3. Alternatively, eRA Service Desk agents can click the **Add Roles to Other org** button to give the account user roles in another organization.

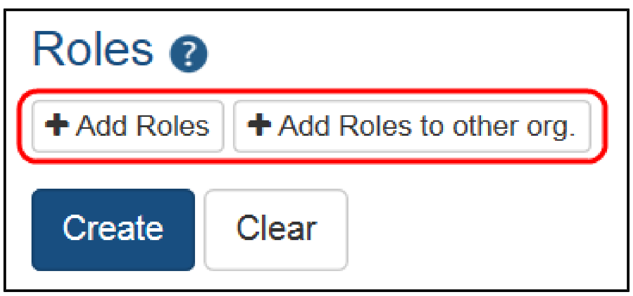


Figure 85: Add Roles Buttons

6.5.1 Commons Users

When the + **Add Roles** button is clicked, the .

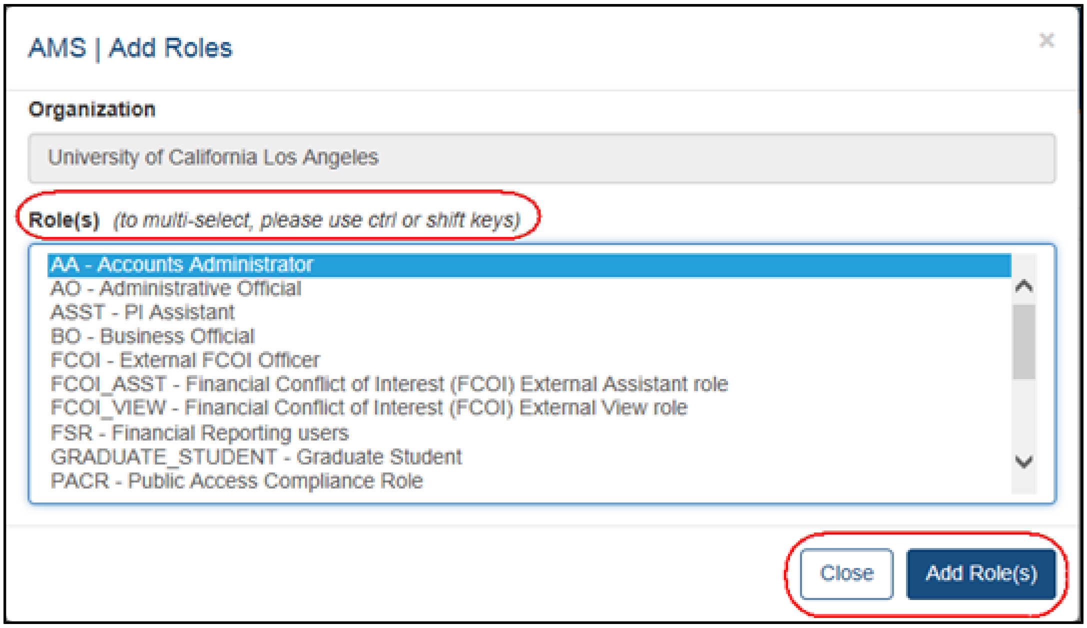


Figure 86: Add Roles Screen

1. Select the appropriate role(s).
   Note: For reference, here is a complete list of Commons user roles.
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).

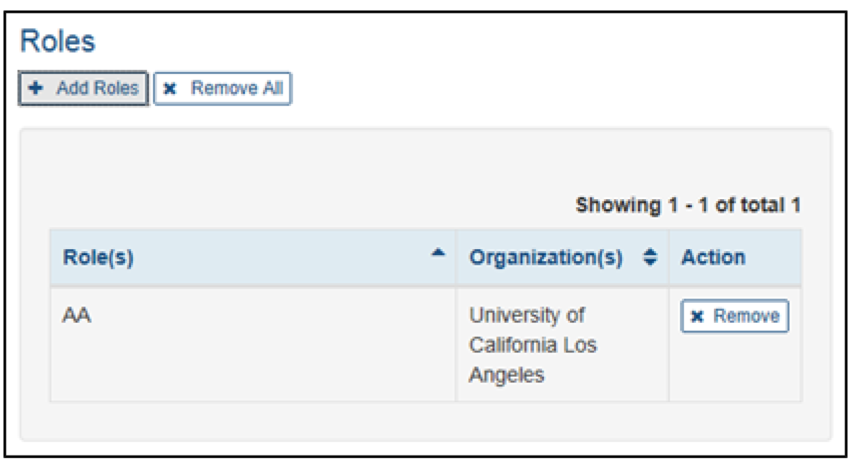
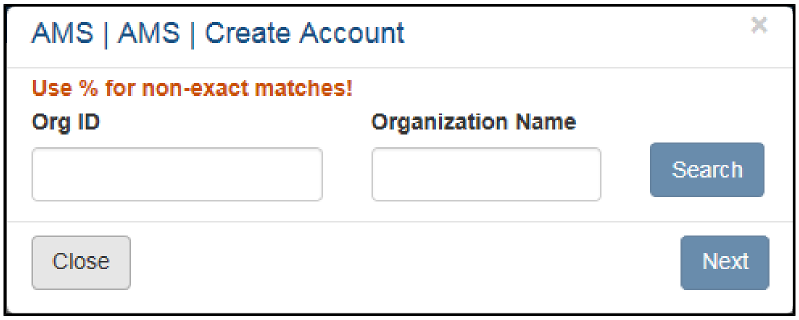


Figure 87: Roles Section on the Create Accounts Screen for Commons Users

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: When the **+ Add Roles to other org.** button is clicked, a pop-up search window opens so you can search for and select the other organization, as shown here.



Select the other organization in this window and click **Next** to proceed to the *Add Roles* screen shown above.

NOTE: You cannot remove Signing Official (SO) role when the Research Performance Progress Report (RPPR) is assigned.

6.5.2 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.

List of Conflicting Roles
RR_CHIEF_ROLE and GM_MANAGER_ROLE
ICO PROGRAM OFFICIAL ROLE and GM_MANAGER_ROLE
RR_SUPERVJSOR_ROLE and GM_MANAGER_ROLE (This role combination requires a waiver from the OPERA Director.)
UADM_ USER_ ROLE and GM_MANAGER_ROLE
UADM_ USER_ ROLE and GM_FMO_ROLE
IPF_CLERK_ROLE and GM_MANAGER_ROLE
IPF_SPECIALIST_ROLE and GM_MANAGER_ROLE

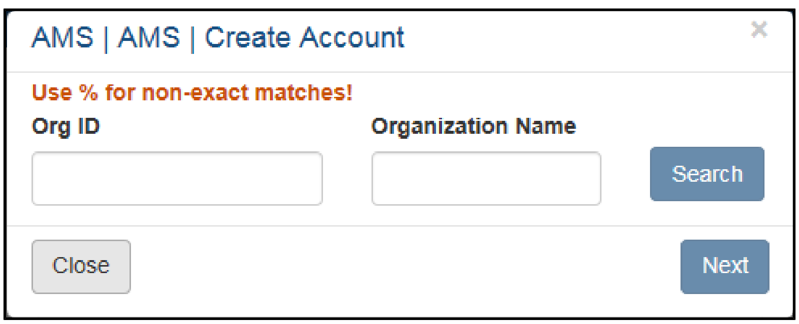
Table 2: List of Conflicting Roles

List of Conflicting Roles
IPF_SUPER_USER_ROLE and GM_MANAGER_ROLE
GM_MANAGER_ROLE and GM_FMO_ROLE
UADM_ ADMIN_ ROLE and GM_MANAGER_ROLE
UADM_ ADMIN_ ROLE and ICO_PROGRAM_OFFICIAL_ROLE
UADM_ ADMIN_ ROLE and GM_FMO_ROLE

Table 2: 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.

Note: When the + **Add Roles to other org.** button is clicked, a pop-up search window opens so you can search for and select the other organization, as shown here.



Select the other organization in this window and click **Next** to proceed to the *Add Roles* screen shown below.

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

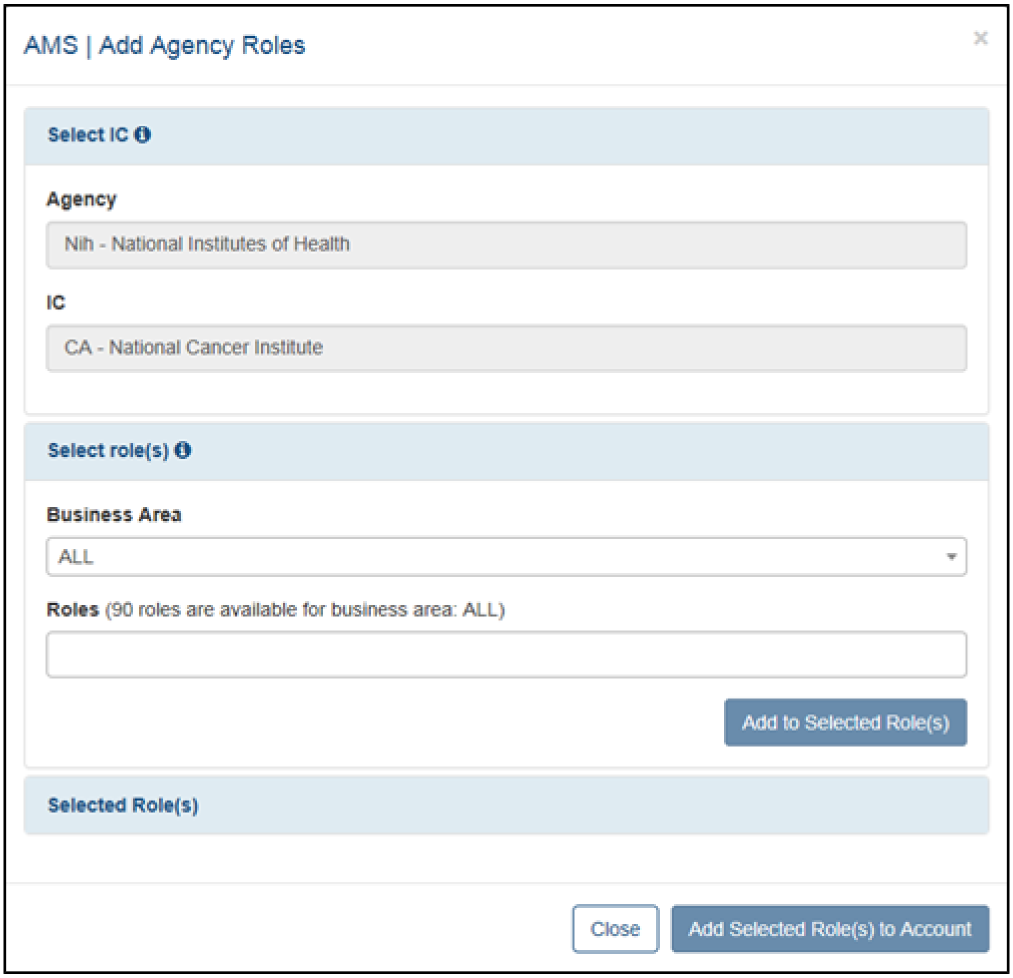


Figure 88: Add Agency Roles Screen for Internal Users

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.

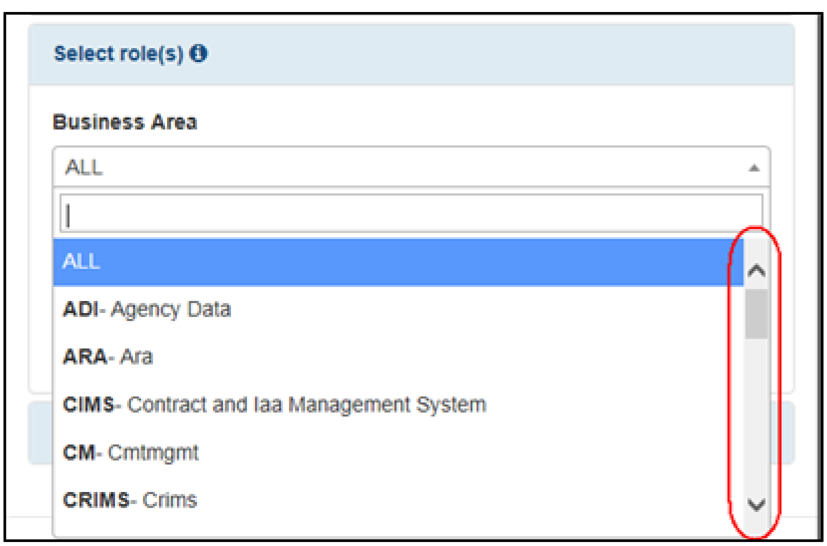


Figure 89: The Business Area Drop-down Menu on the Add Agency Roles Screen

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

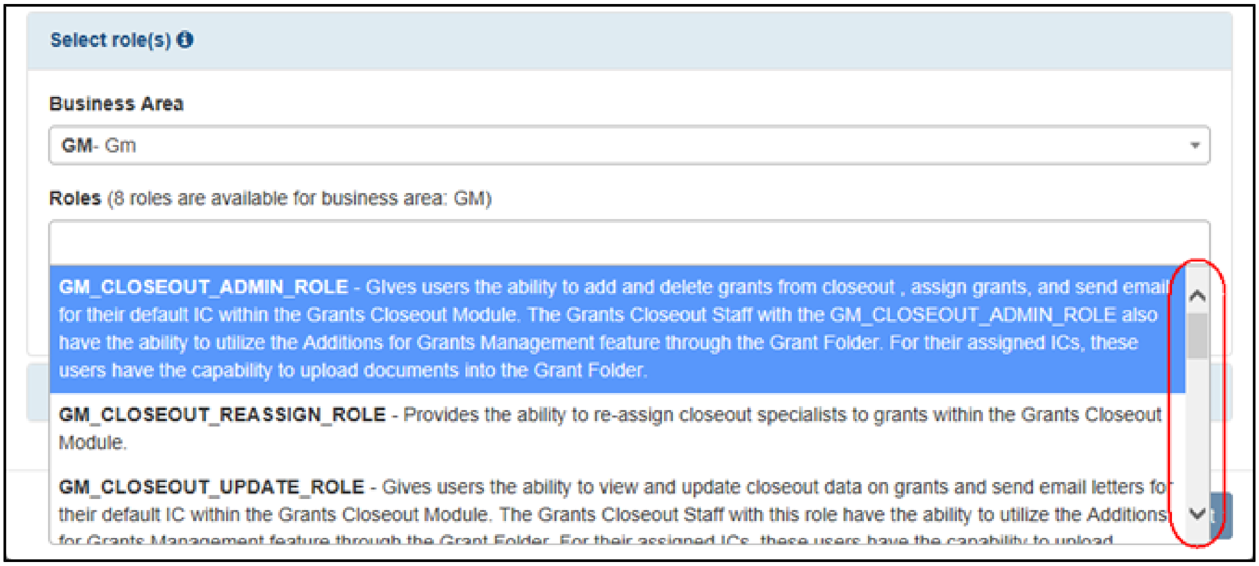


Figure 90: The Role Drop-down Menu on the Add Agency Roles Screen

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

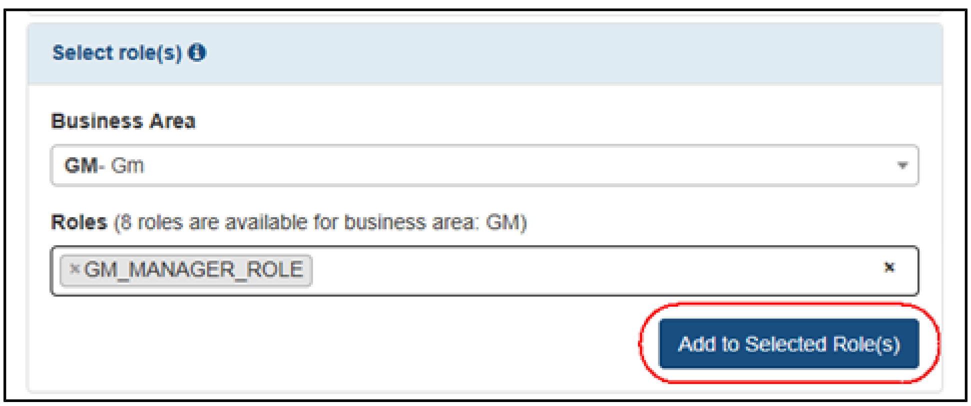


Figure 91: Add Agency Roles Screen Displaying the Add to Selected Role(s) Button

When the **Add to Selected Role(s)** button is clicked, the role is added on the *AMS | Add Roles* screen .

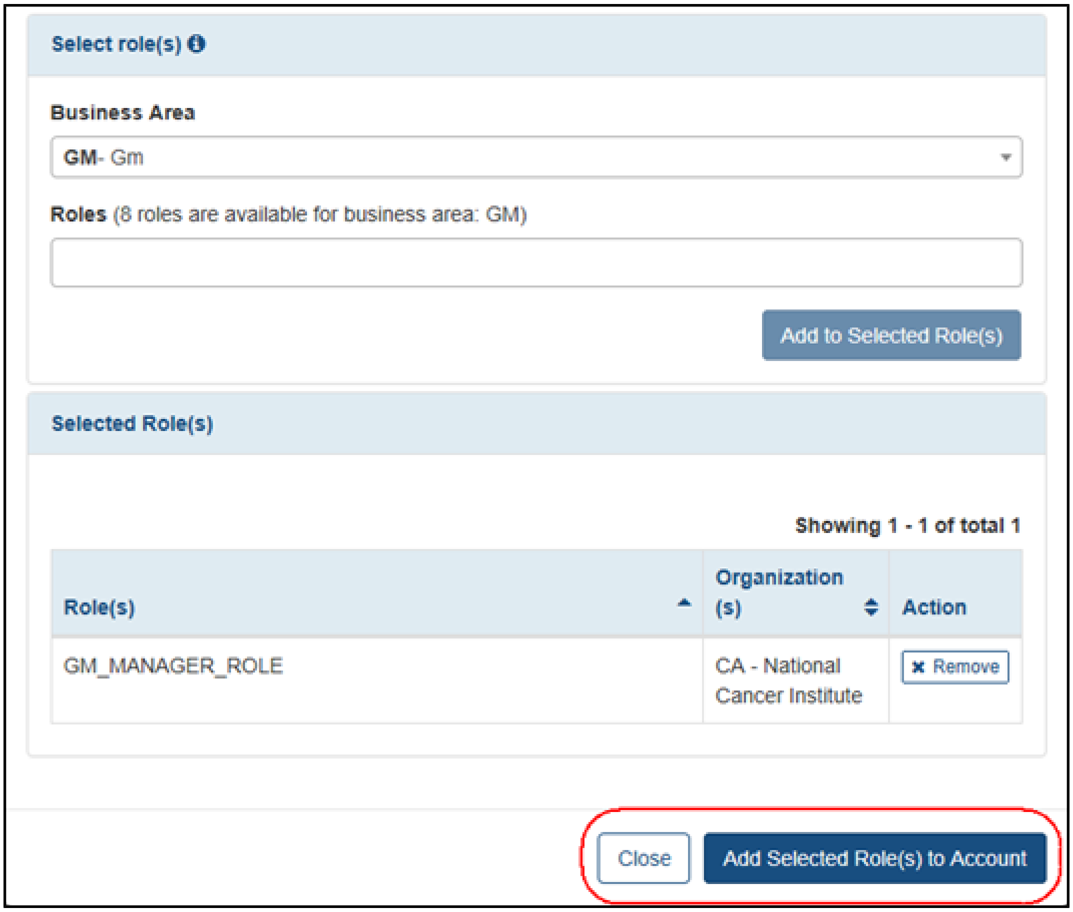


Figure 92: Selected Role(s) Section on the Add Agency Roles Screen

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 appears on the *Create Accounts* or *Manage Account* screen.

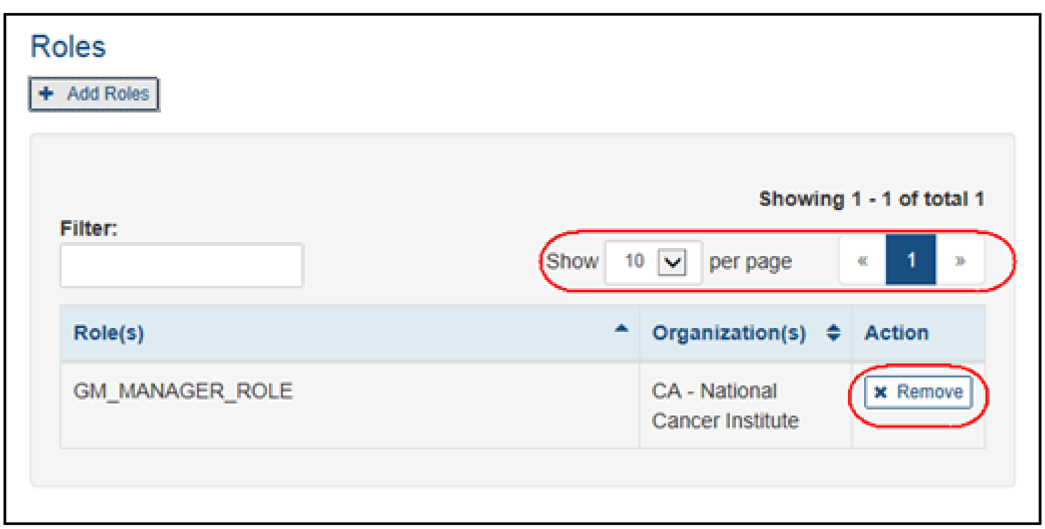


Figure 93: Roles Section on the Create Accounts Screen

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*.

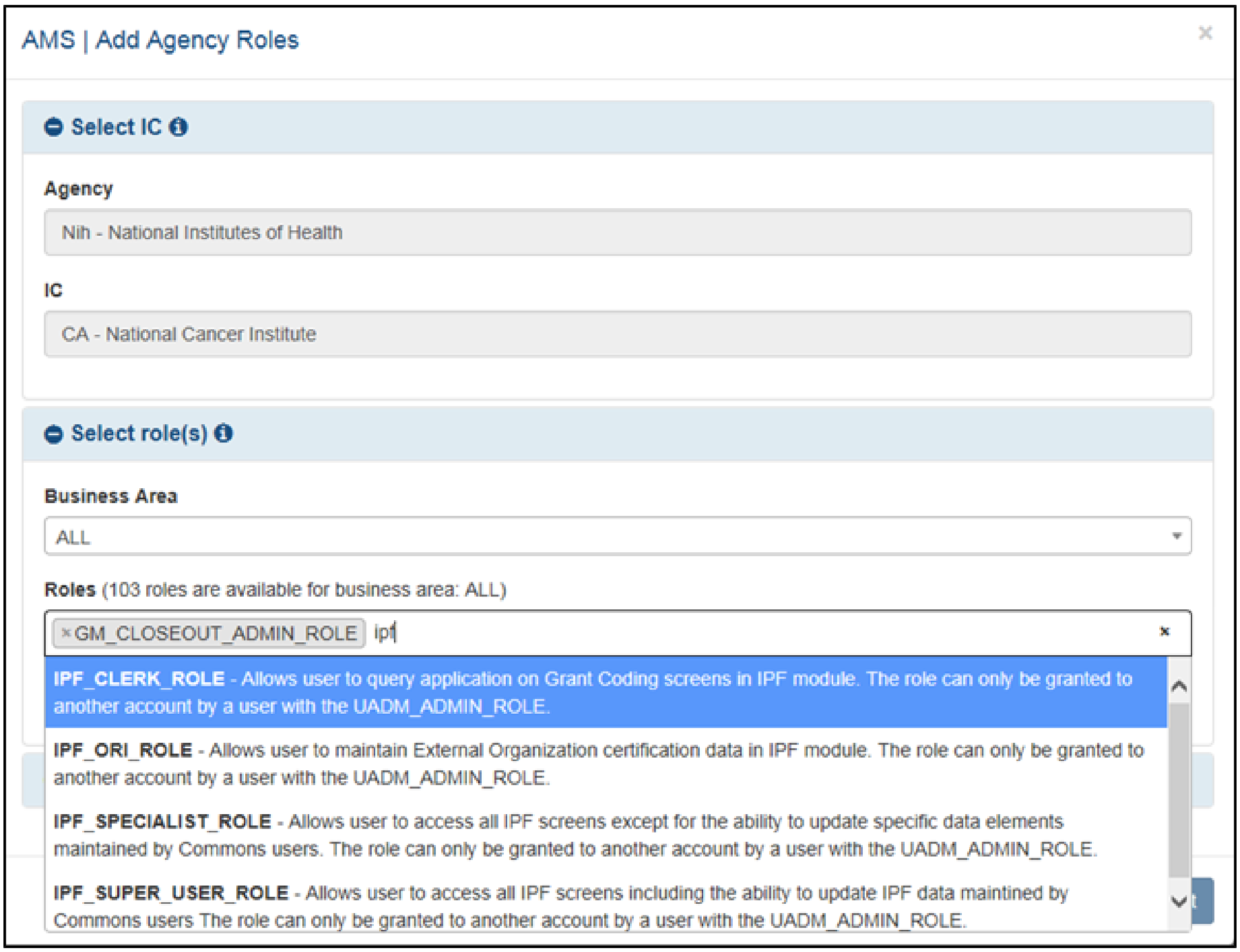


Figure 94: Add Agency Roles Screen Displaying Adding Multiple Roles

10. Select the next appropriate role.

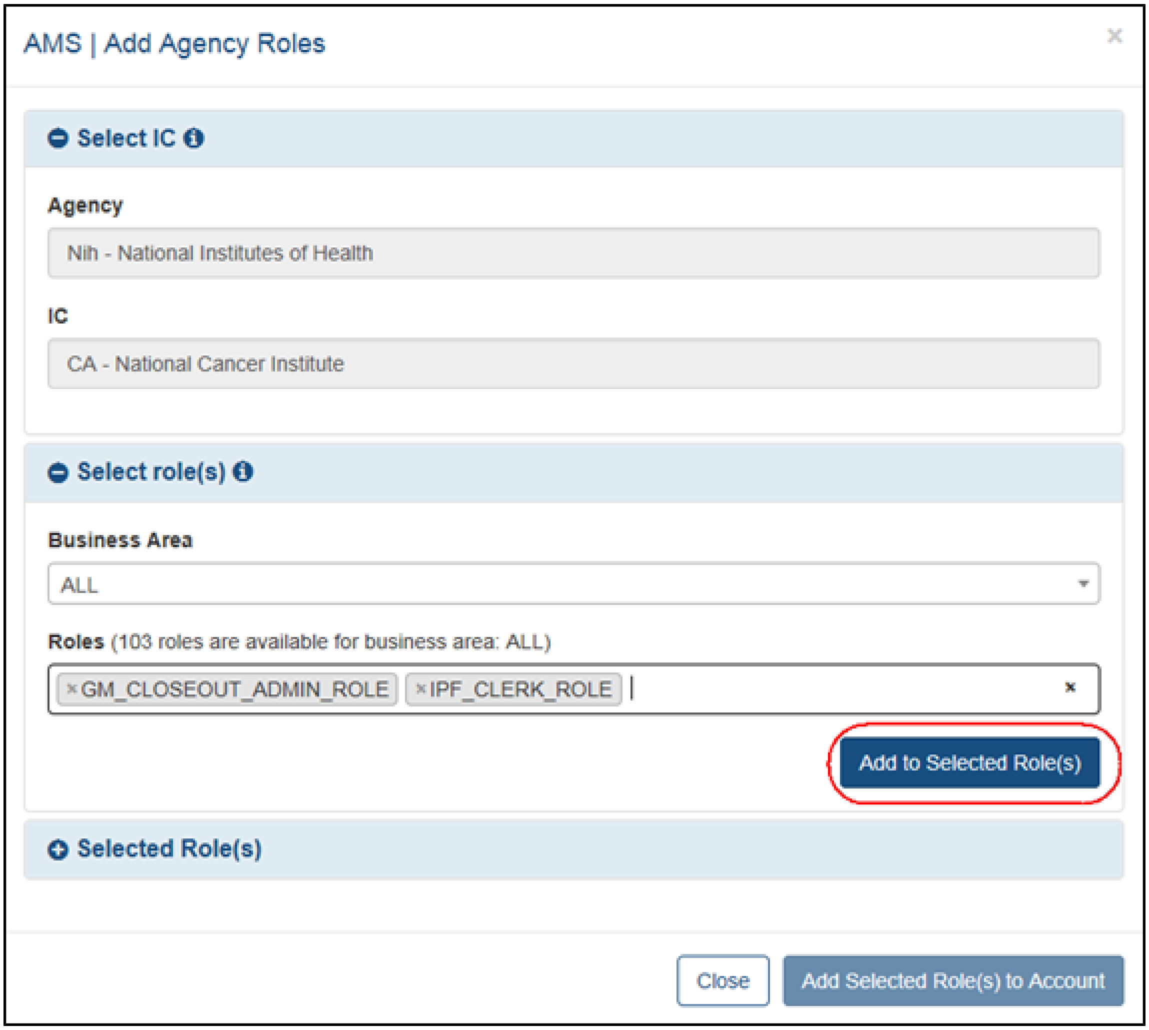


Figure 95: Add Agency Roles Screen Displaying the Add to Selected Role(s) Button

11. Click the **Add to Selected Role(s)** button to add the selected roles.

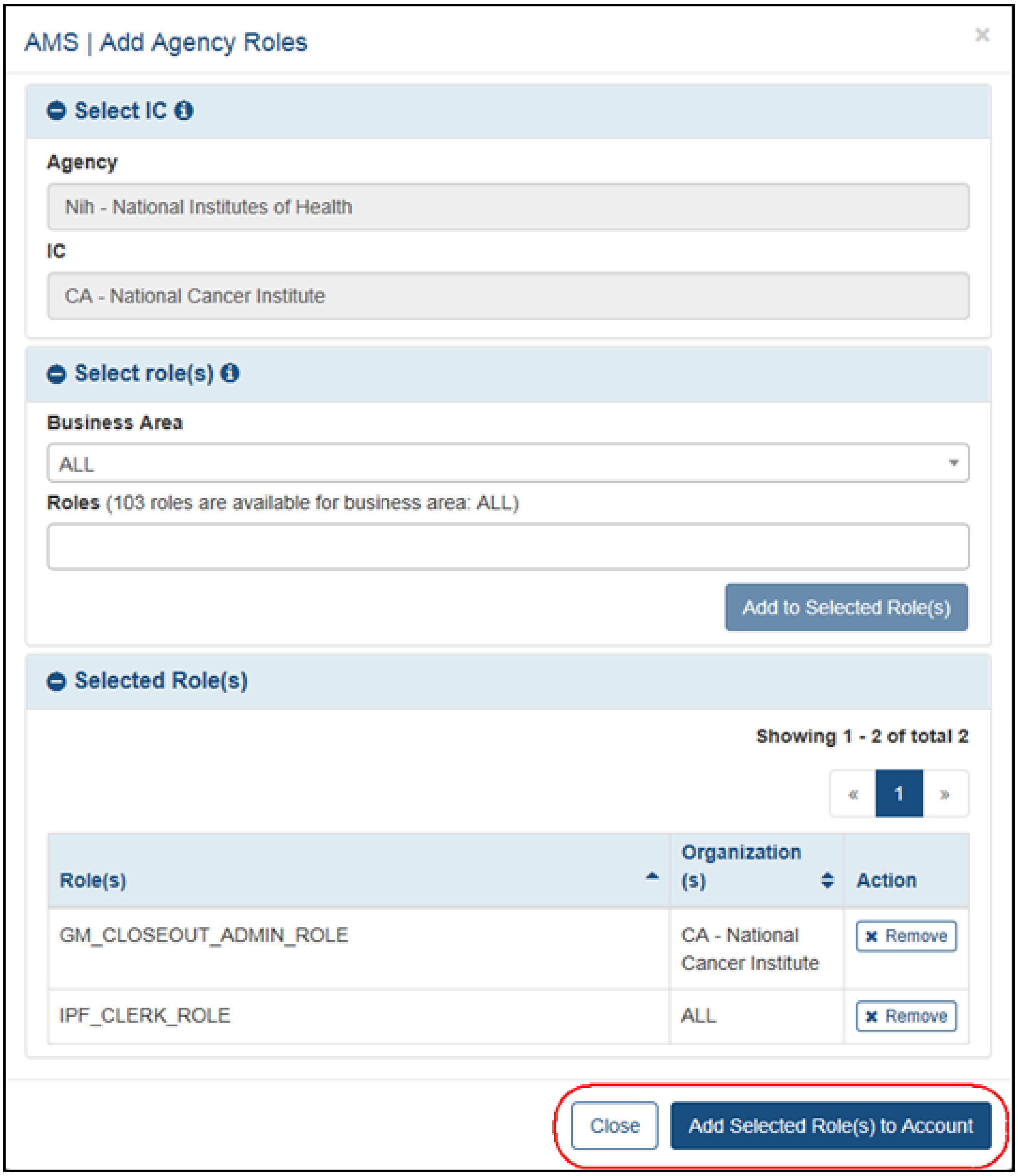


Figure 96: Add Agency Roles Screen Displaying the Add Selected Role(s) to Account Button

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 appears on the *Create Accounts* or *Manage Account* screen.

6.5.3 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.

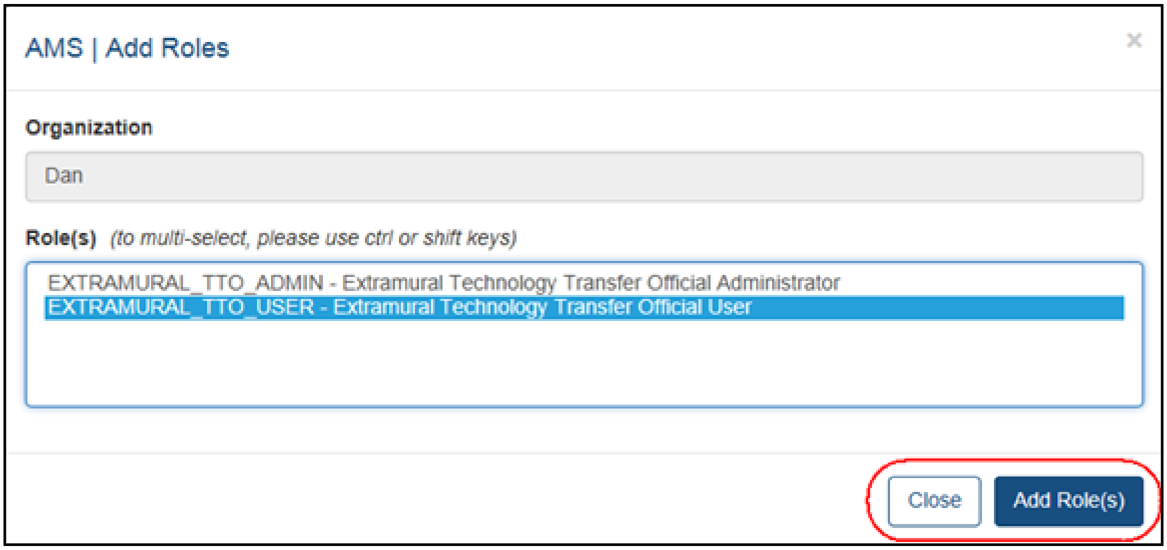


Figure 97: Add Roles Screen for External iEdison Users

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).

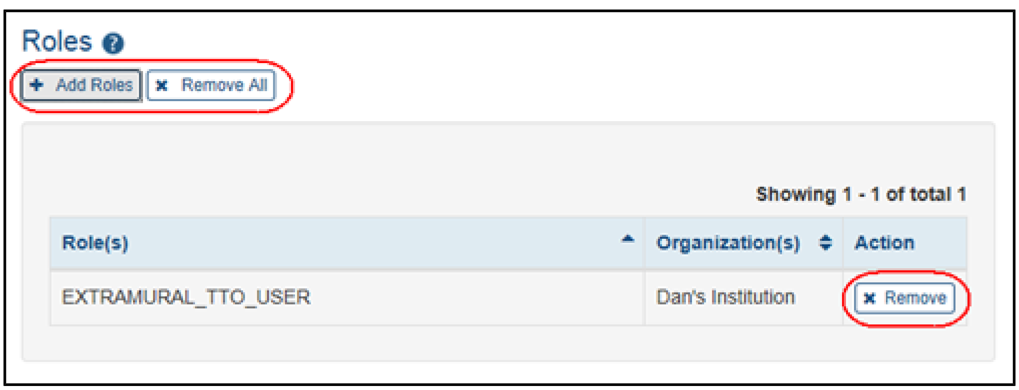


Figure 98: Roles Section on the Create Accounts Screen for External iEdison Users

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.

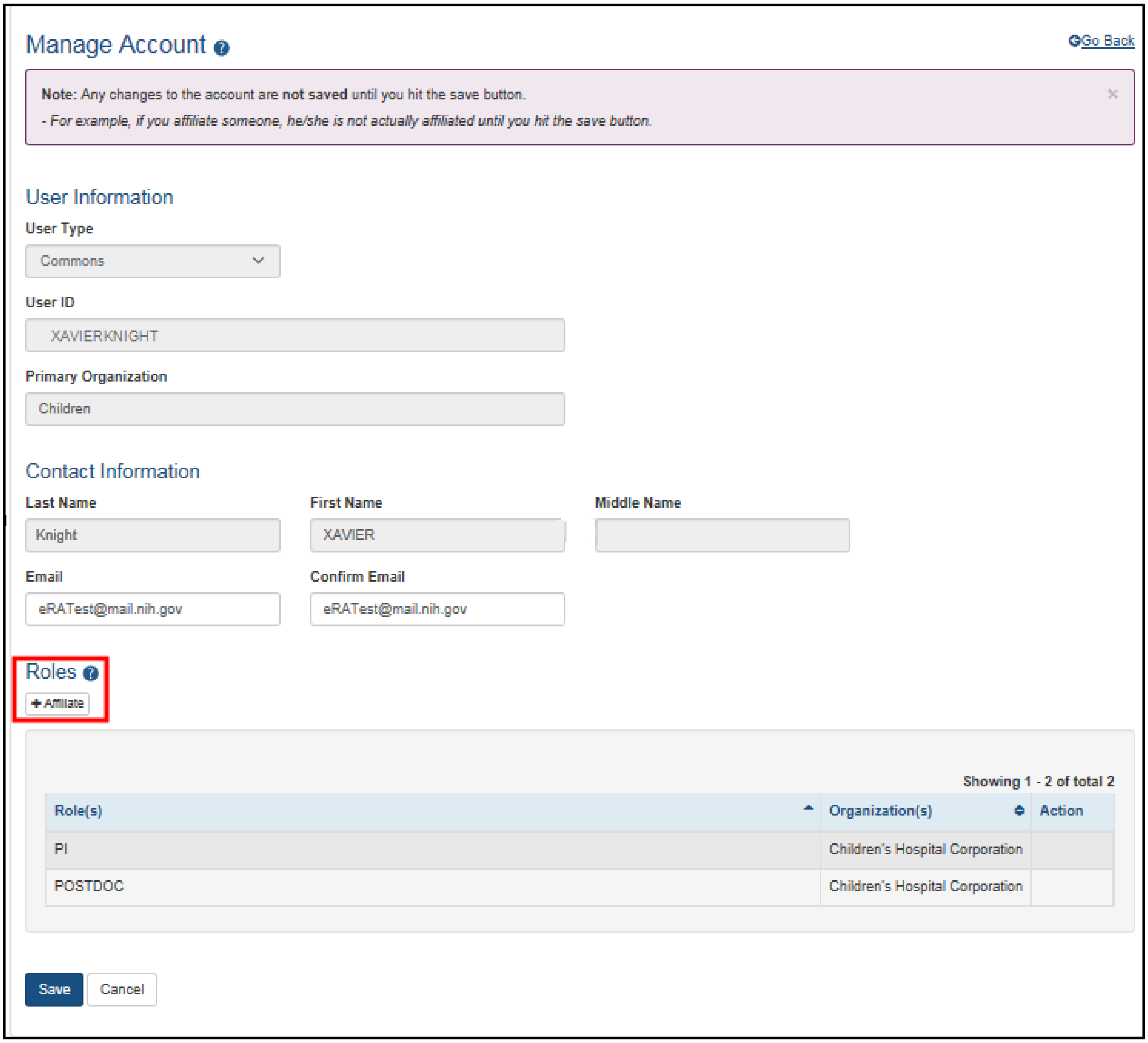
6.6 Affiliate Account

External Users

NOTES:

- Only accounts with ***scientific*** roles such as PI, SPONSOR, POSTDOC, ASST, etc., are permitted to be affiliated with more than one institution.
- Accounts with ***administrative*** roles (SO/AO, AA, BO, TTO Admin, TTO User) can belong to one institution only.
- Further, if a user leaves (unaffiliates) an administrative role at one institution, that account cannot be affiliated to a different institution in any administrative **or** scientific role: The user needs to create a new account to use with the new institution.
- Additionally, you cannot remove administrative roles from an existing account in order to add a scientific role instead: Once a user has held administrative role, he or she must create a new user account to use in another role.

1. To affiliate an existing account with an organization, search for the user in AMS and select the **Manage** button in the action column of the search results.
2. Click the **Affiliate** button under *Roles* on the *Manage Account* screen. (click to view)



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.

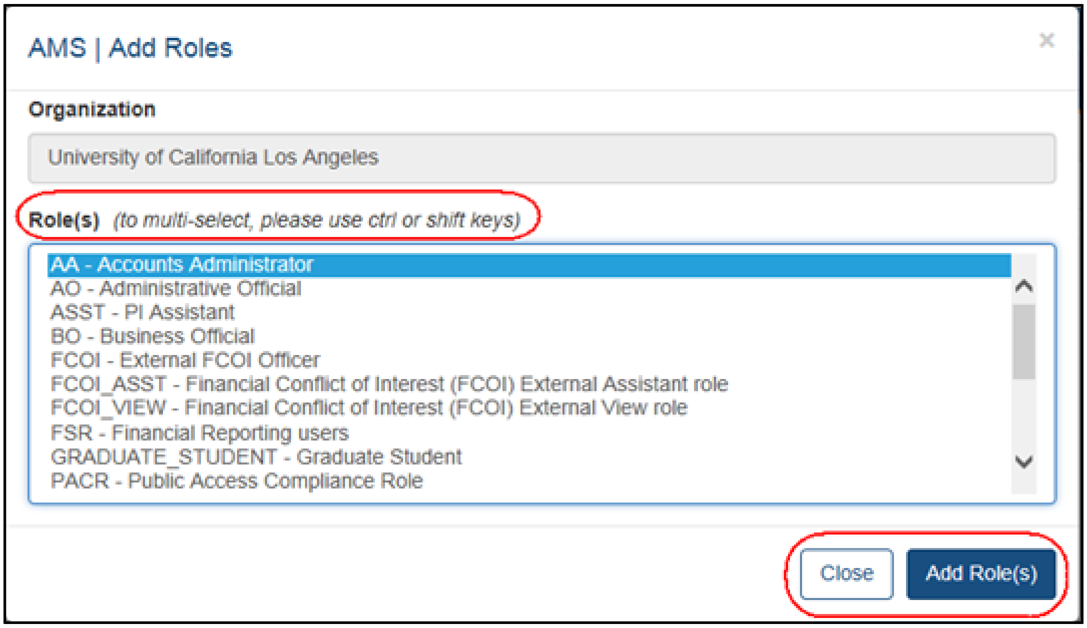


Figure 99: Add Roles screen

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 appears in the *Roles* section on the *Manage Account* screen.

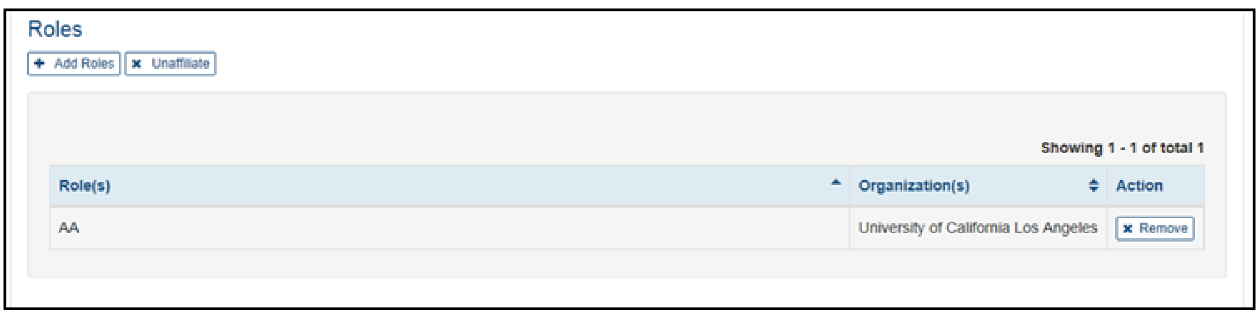


Figure 100: Roles section on the Manage Account screen

Agency Users

When a role is added for an agency or IC user at account creation time, the account is considered affiliated with that agency or IC. For information on adding roles, please refer to the Add Roles topic.

6.7 Unaffiliate Account

6.7.1 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.

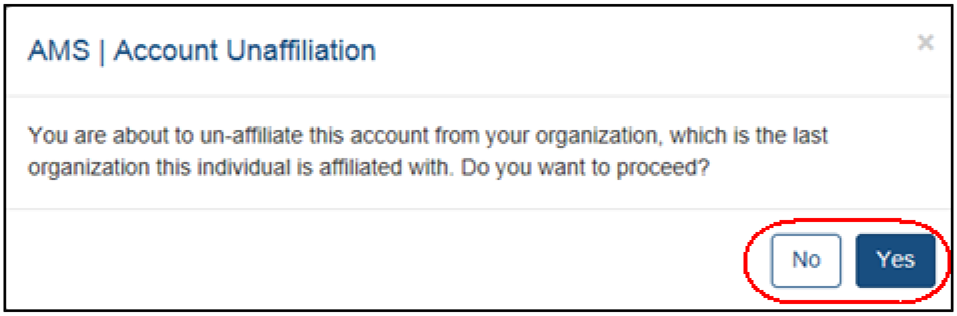


Figure 101: Account Unaffiliation Screen

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.

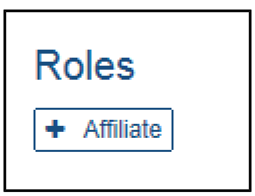


Figure 102: Affiliate Button in Roles Section on Manage Account Screen

6.8 Deactivate Account

When you click the **Deactivate** button in the *Manage Account* screen, the *Deactivate Account* screen opens, .

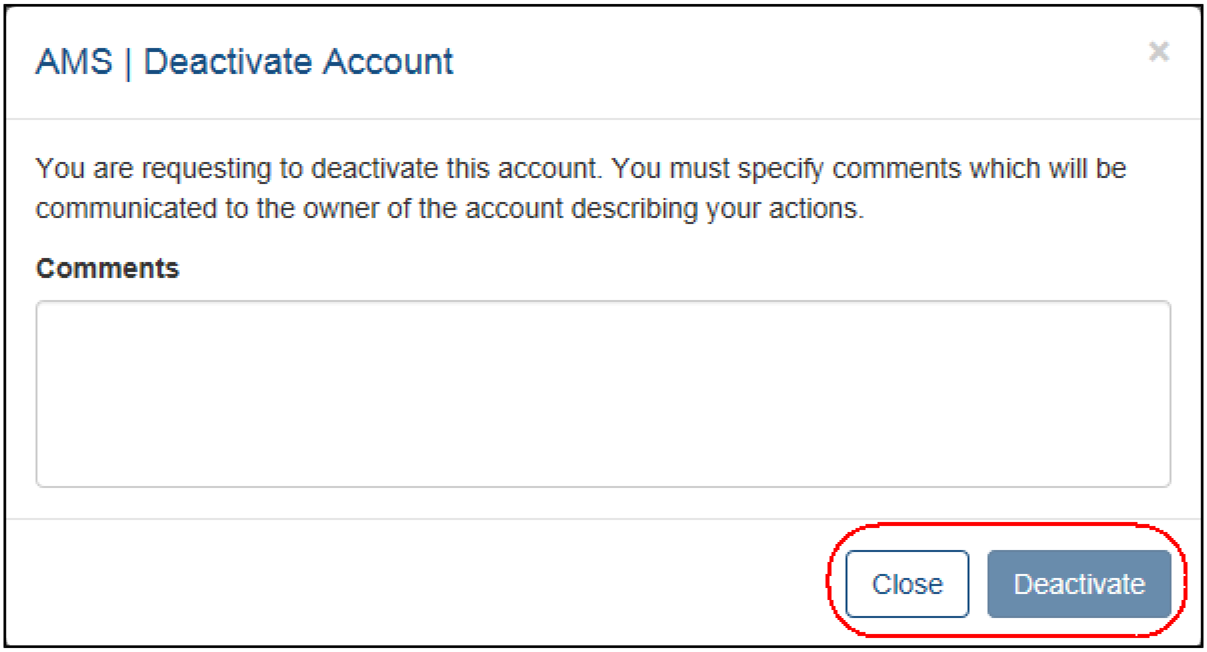


Figure 103: Deactivate Account Screen

1. Enter a comment (mandatory).

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

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2. Then click **Deactivate** to deactivate the account or click **Close** to close the screen.

When you click **Deactivate**, the system removes the mapping between the NIH/Agency User ID and the eRA User ID, removes all assigned roles, and sends an email notice to the account owner that includes the text you entered in the **Comments** field. The account will no longer appear in account-search results.

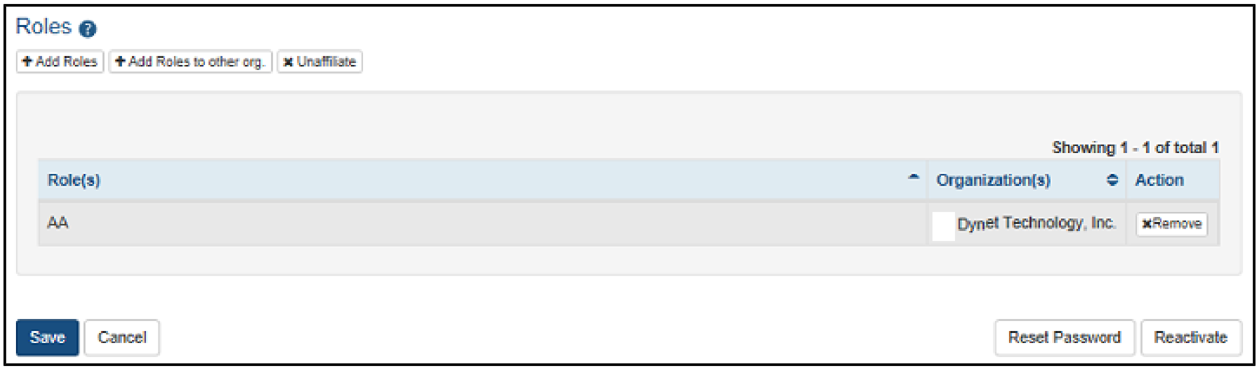
6.9 Reactivate or Unlock Account

6.9.1 Commons Users and Agency Users

Follow these steps to reactivate an account that has been deactivated by an administrator, or to unlock an account that has been locked due to inactivity.

1. Open the account in the *Manage Account* screen.

2. If an account is deactivated, a **Reactivate** button will be present at the bottom of the *Manage Account* screen, as shown here. Click this button to proceed.



2.a If an account is locked due to inactivity, an **Unlock** button will be present at the bottom of the *Manage Account* screen, as shown here. Click this button to proceed.

3. When you click **Reactivate** or **Unlock**, the *Reactivate Account* or *Unlock Account* screen opens, as shown here.

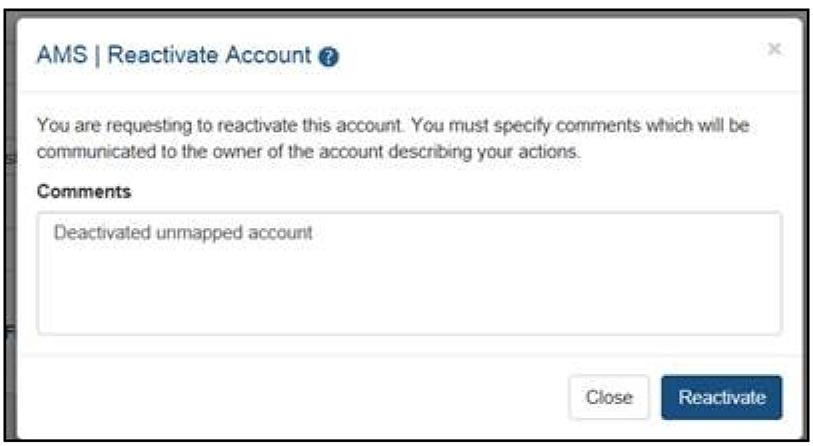


Figure 104: Reactivate Account screen

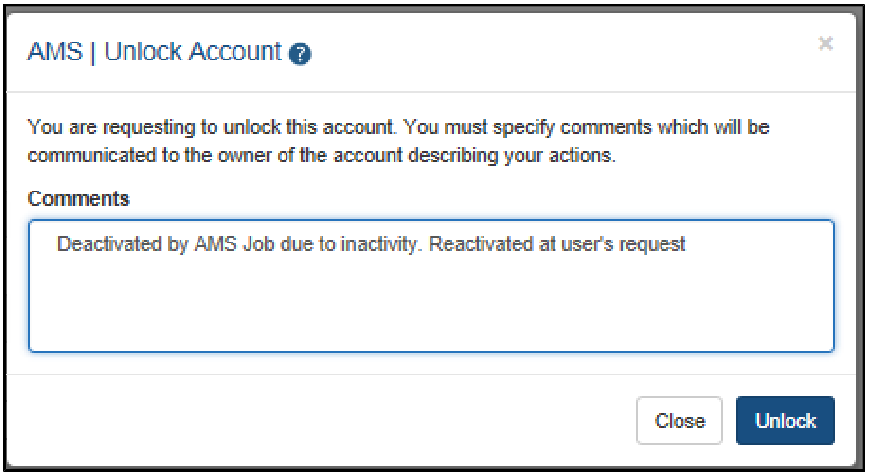


Figure 105: Unlock Account screen

4. In either screen, take these steps:

a. *Mandatory*: Enter comments in the comments field to inform the user about this action.
b. Click **Reactivate** or **Unlock** to reactivate/unlock the account, or click **Close** to cancel.

When you click **Reactivate** or **Unlock**, the system reactivates/unlocks the account and displays a confirmation message, as shown below.

And the account owner receives an email notice that includes the text you entered in the **Comments** field.

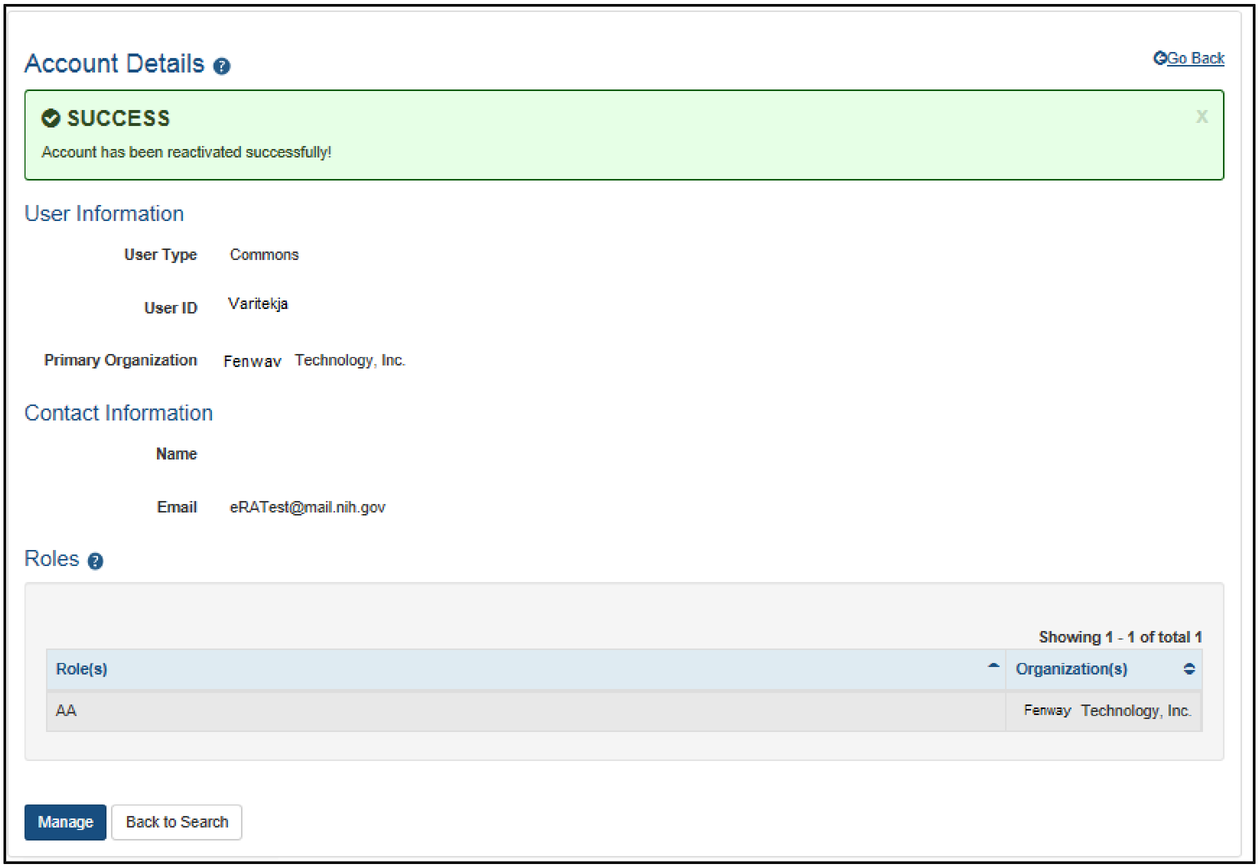


Figure 106: Reactivate confirmation message

Figure 107:

NOTE: When you unlock an account, the user receives a notification saying that he or she has to login to the account on that same day or the account will be relocked.

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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.

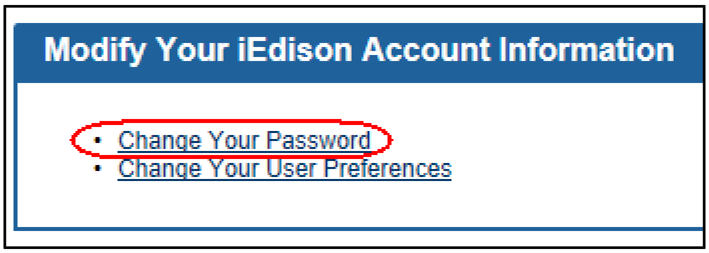


Figure 108: iEdison Main Menu Screen Displaying Change Your Password Hyperlink

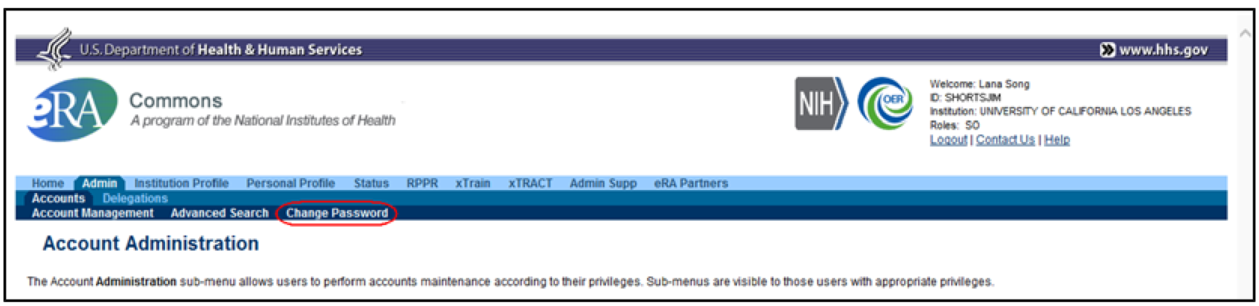


Figure 109: Commons Menu Tabs Displaying the Change Password Tab

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

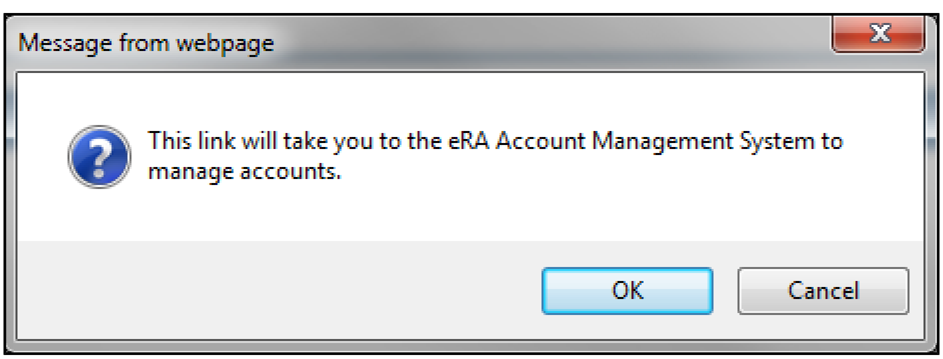


Figure 110: Accessing AMS Pop-up Screen

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.

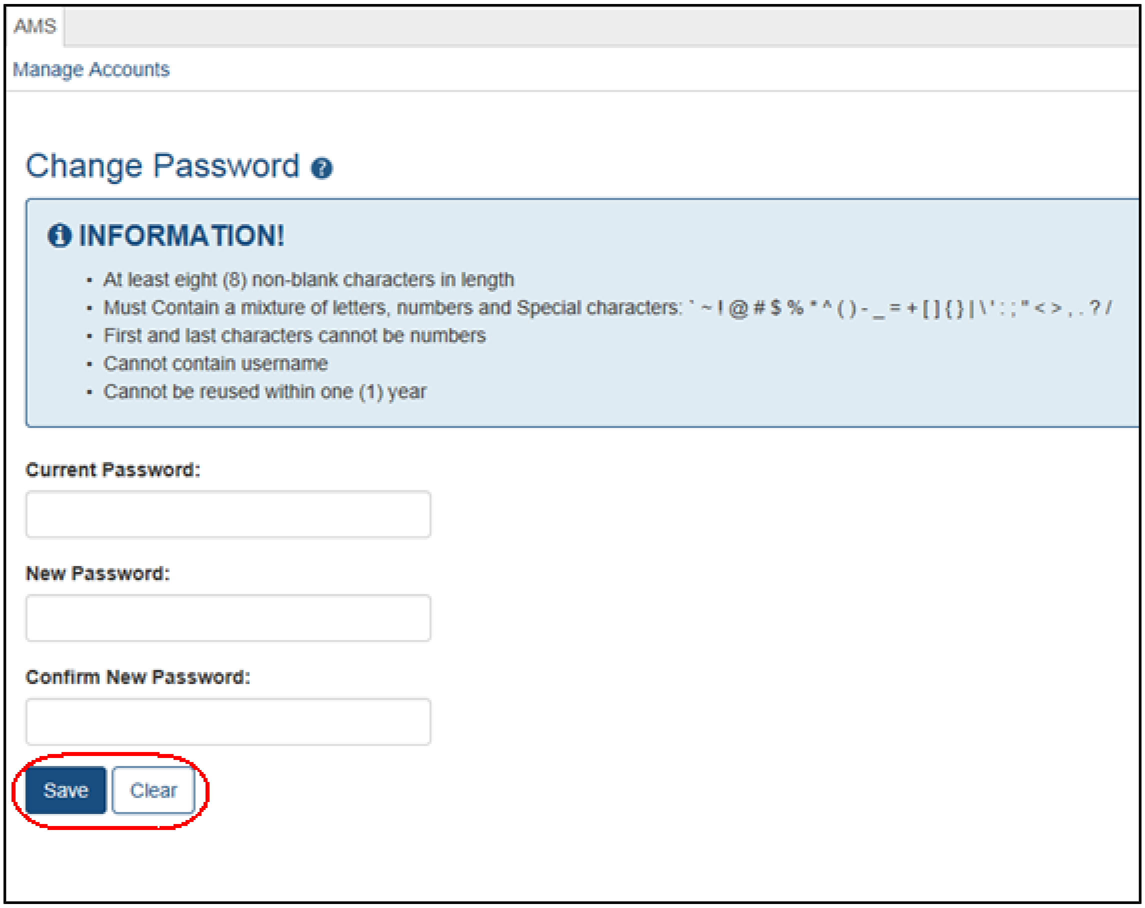


Figure 111: Change Password Screen

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.

7 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.

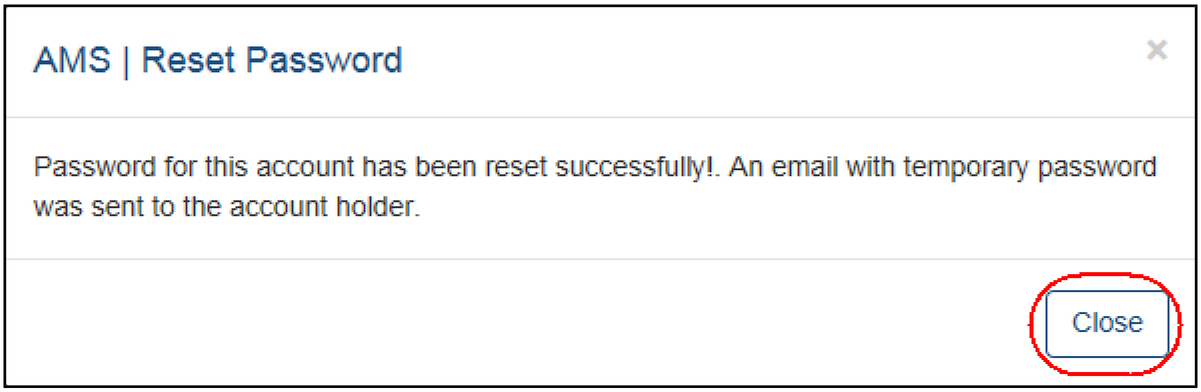


Figure 112: Reset Password Screen

2. Click the **Close** button to close the screen.

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 topic 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.

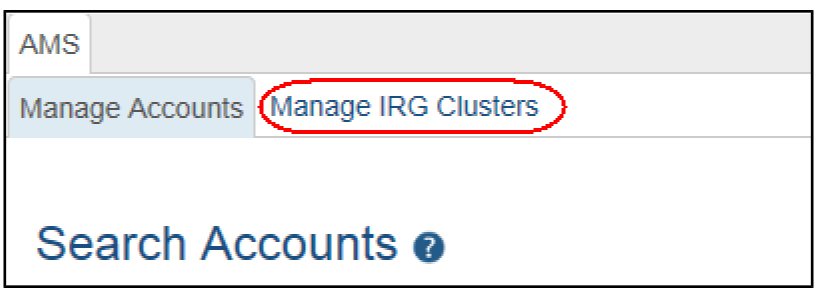


Figure 113: AMS Tabs Displaying the Manage IRG Clusters Tab

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.

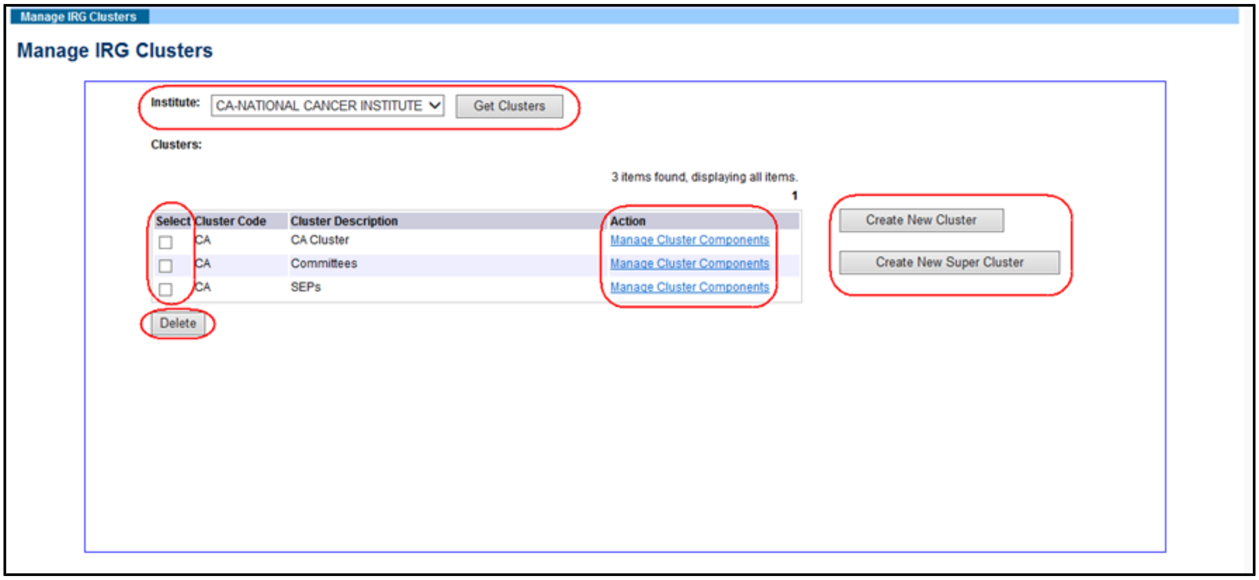


Figure 114: Manage IRG Clusters Screen

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.*

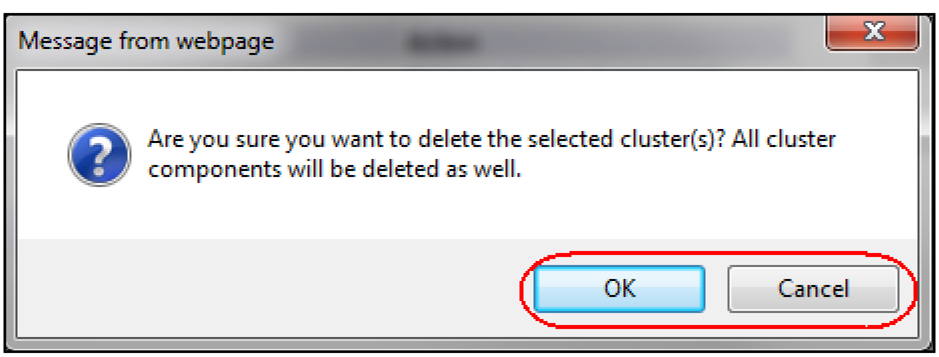


Figure 115: Delete Cluster Pop-up Message Screen

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)?*

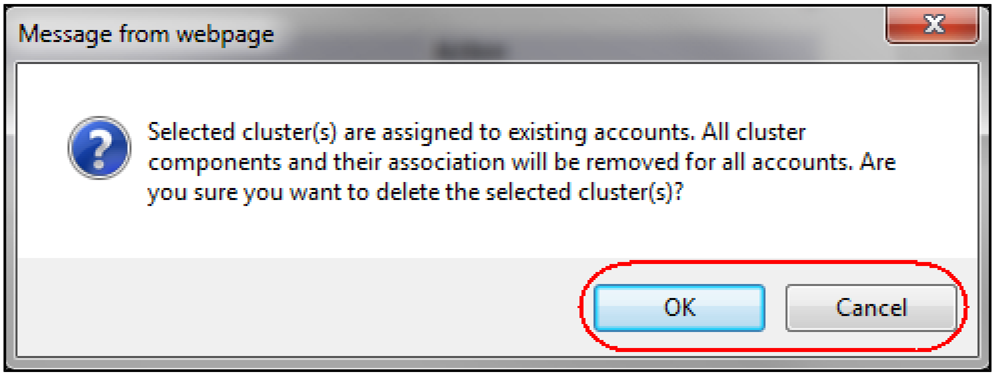


Figure 116: Delete Cluster Pop-up Message Screen for Existing Accounts

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.

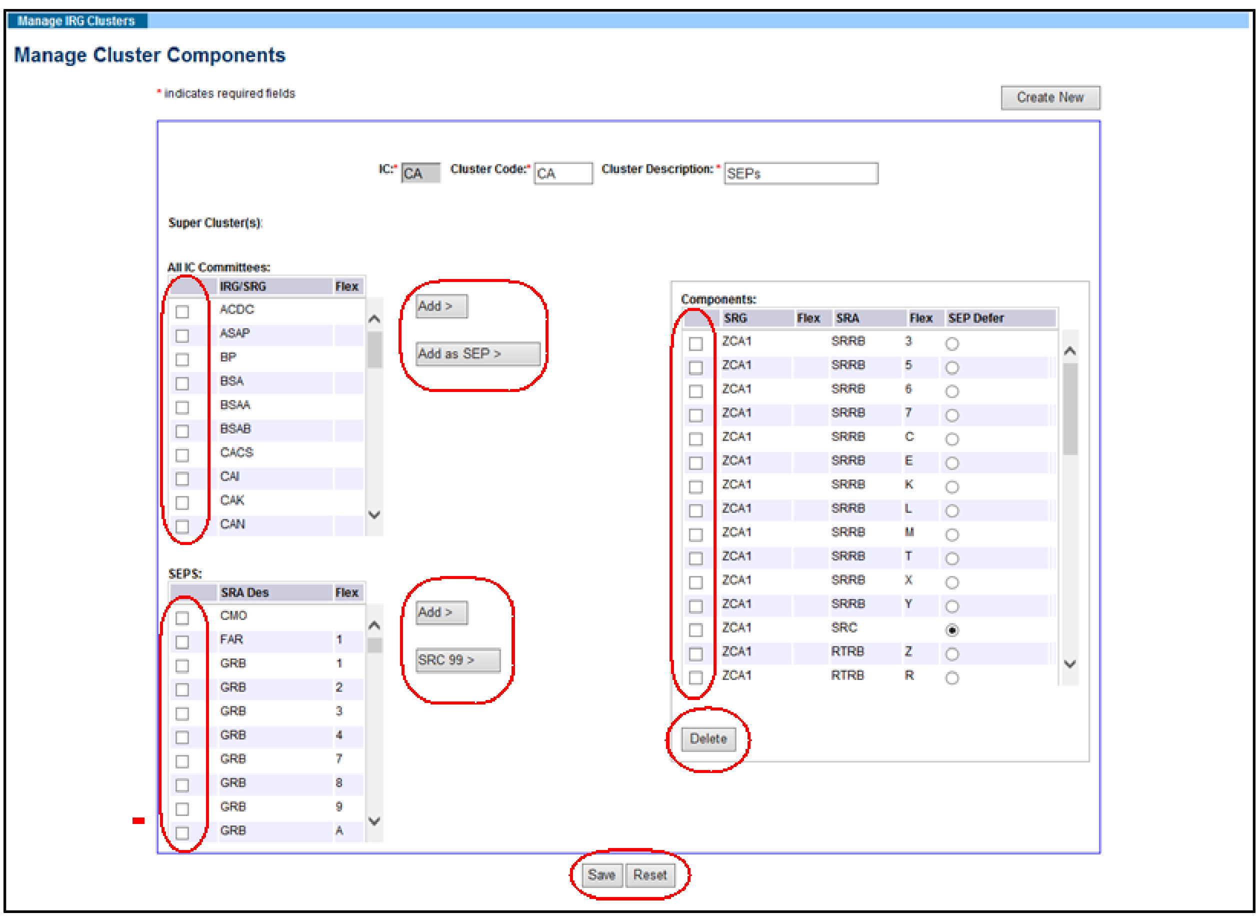


Figure 117: Manage Cluster Components Screen

5. To create a new cluster or super cluster, click the **Create New Cluster** or **Create New Super Cluster** button.
   a. For more information, please refer to the Create IRG Clusters or Create New Super Cluster topic.

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: **Cluster Code**, **Cluster Description**, and **Components**.

There are two different ways to access a blank *Manage Cluster Components* screen to create an IRG cluster.

1. For the first way, select the **Create New Cluster** button from the *Manage IRG Clusters* screen.

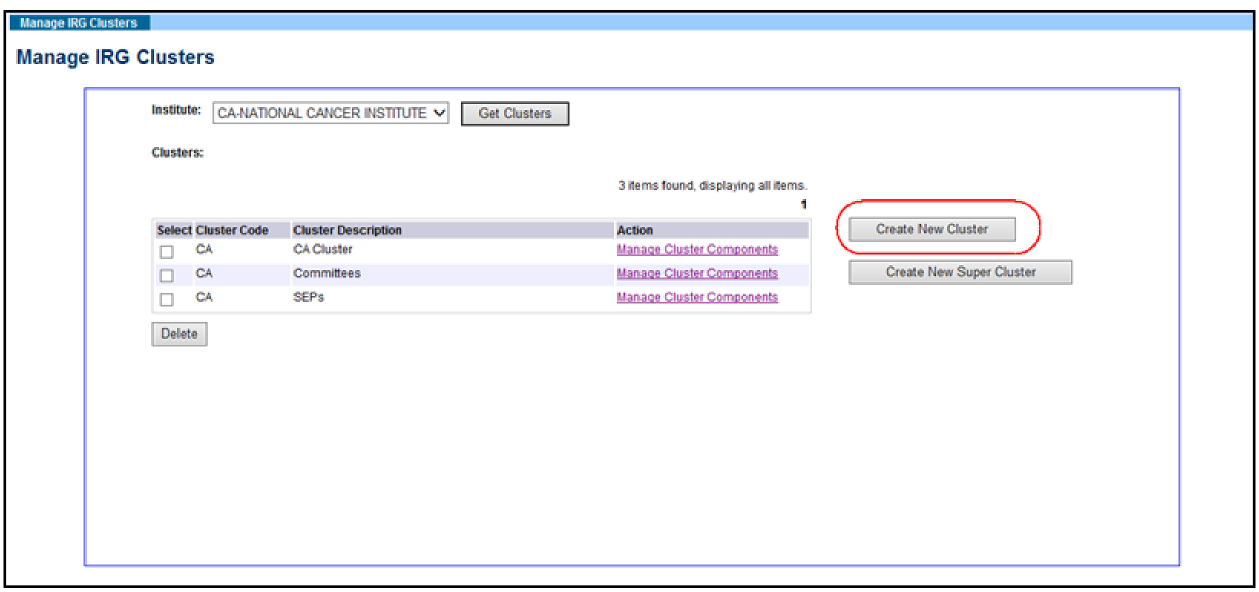


Figure 118: Manage IRG Clusters Screen Displaying the Create New Cluster Button

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.

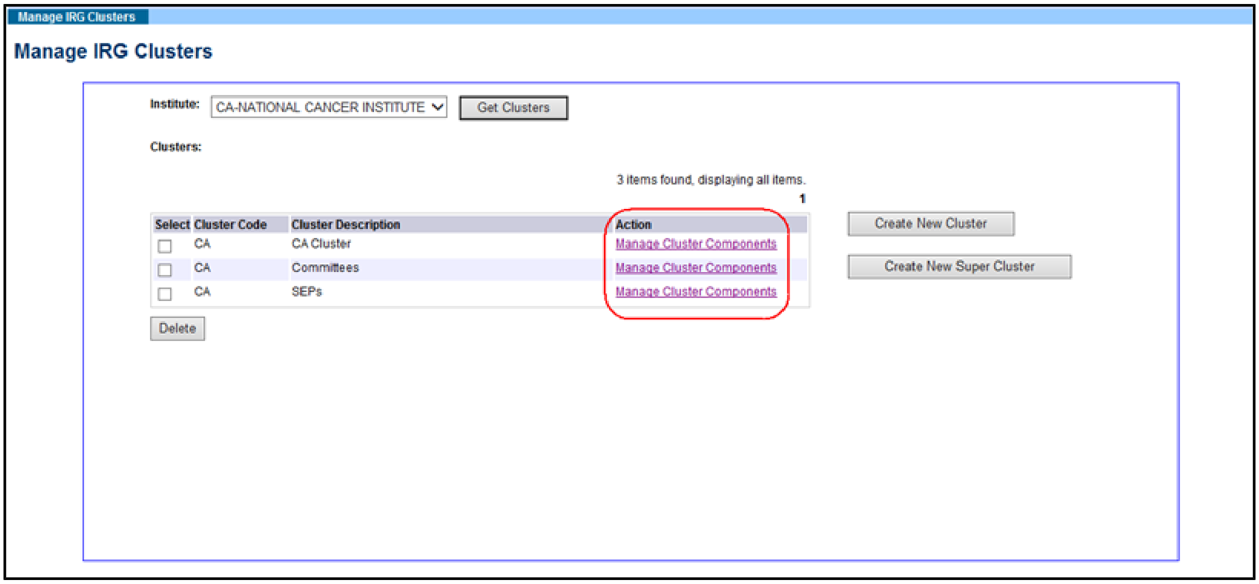


Figure 119: Manage IRG Clusters Screen Displaying Manage Cluster Components Hyperlinks

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

3. Click the **Create New** button.

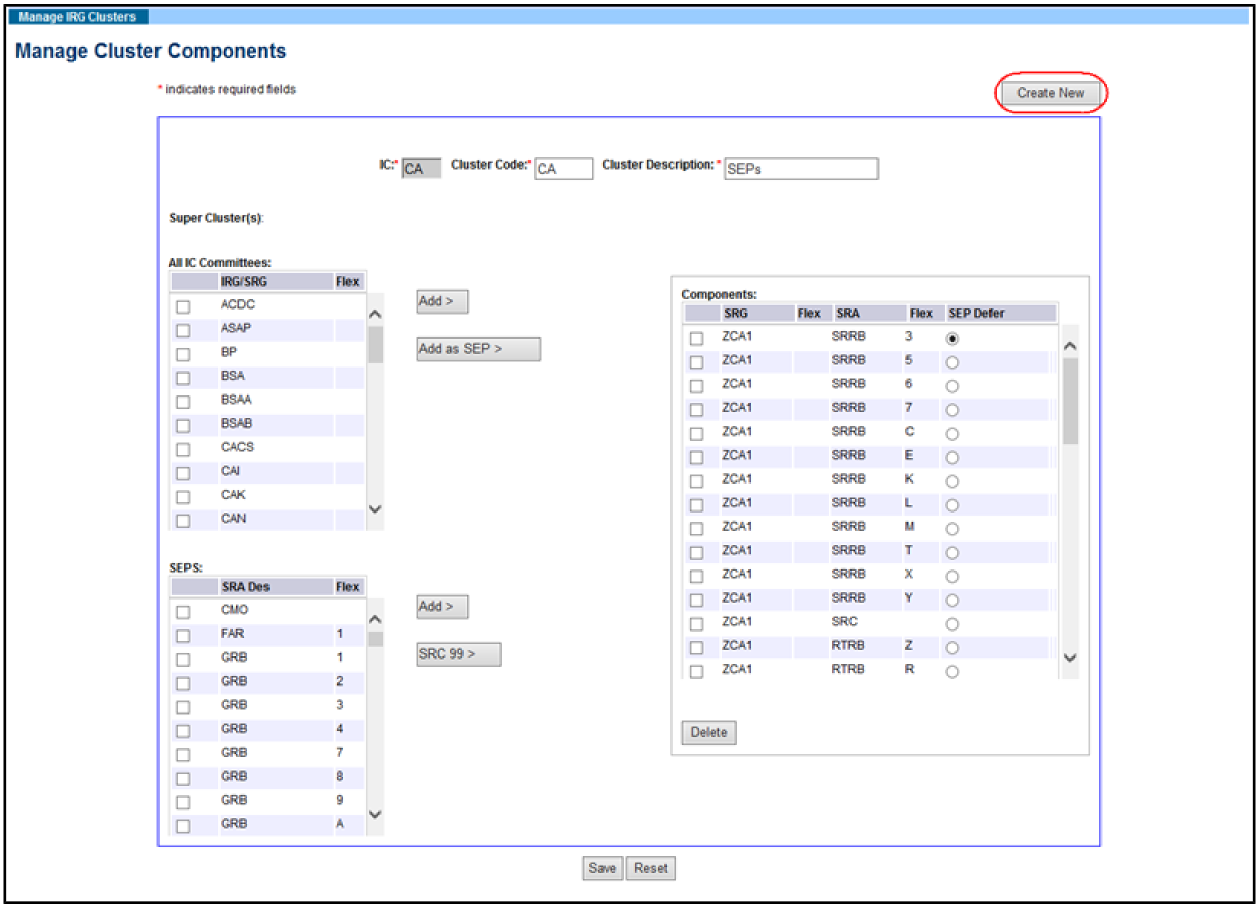


Figure 120: Manage Clusters Component Screen

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.

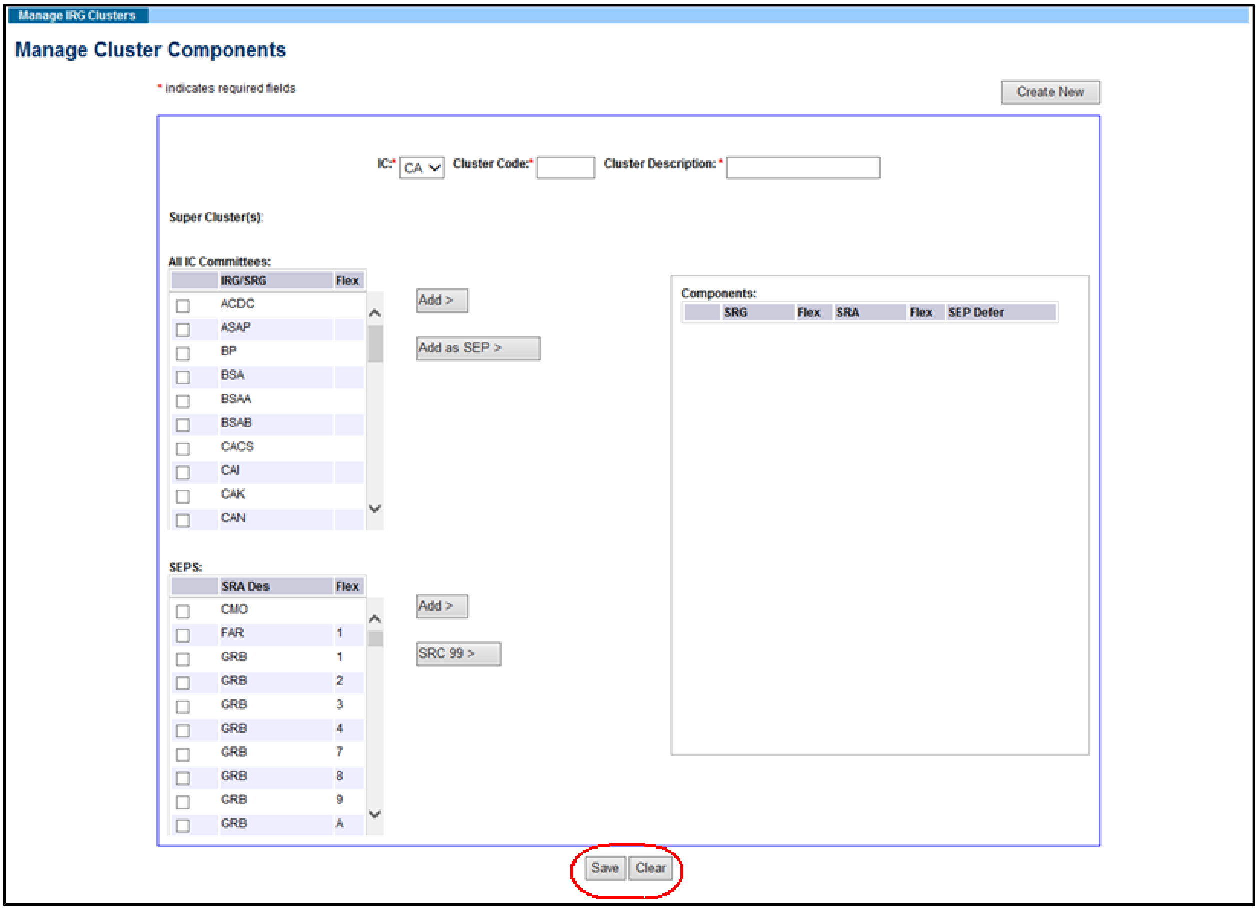


Figure 121: Manage Clusters Component Screen

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.

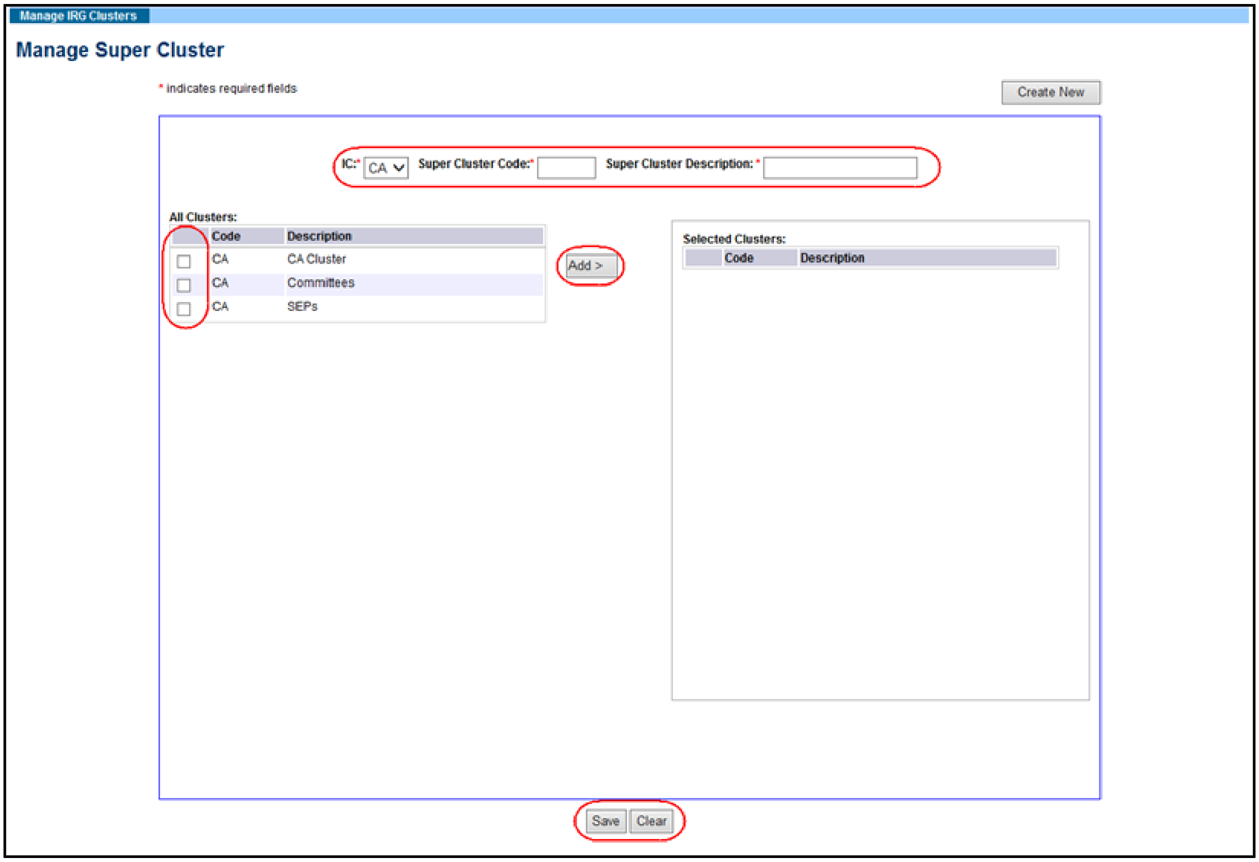


Figure 122: Manage Super Cluster Screen

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*.

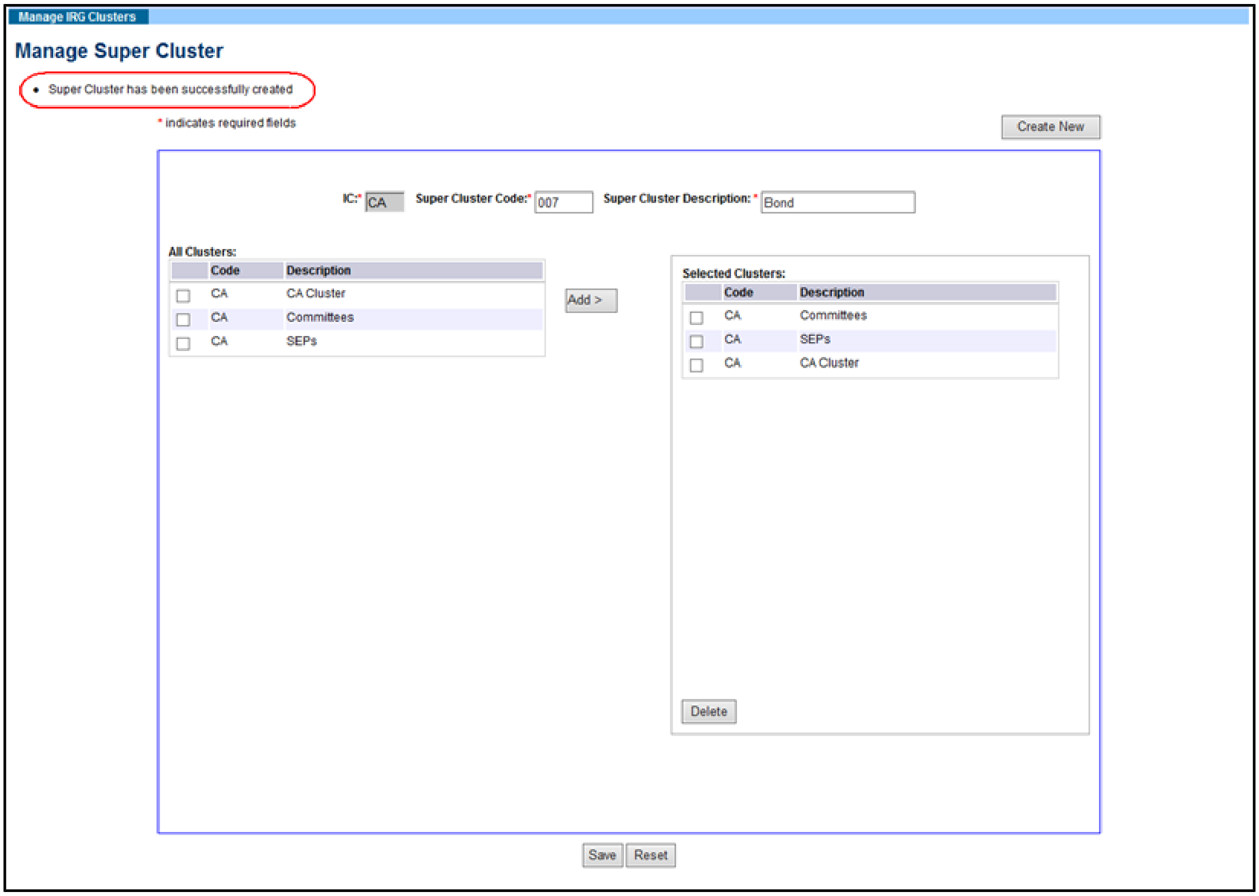


Figure 123: Manage Super Cluster Screen Displaying Successful Message

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.*

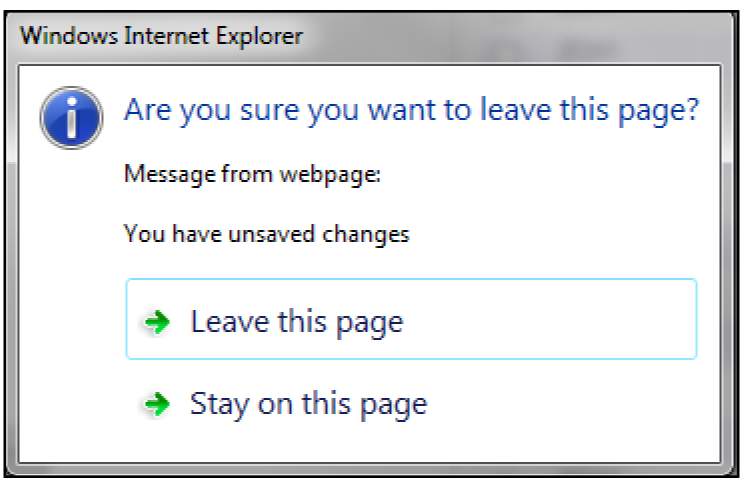


Figure 124: Warning Pop-up Message Screen

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 .

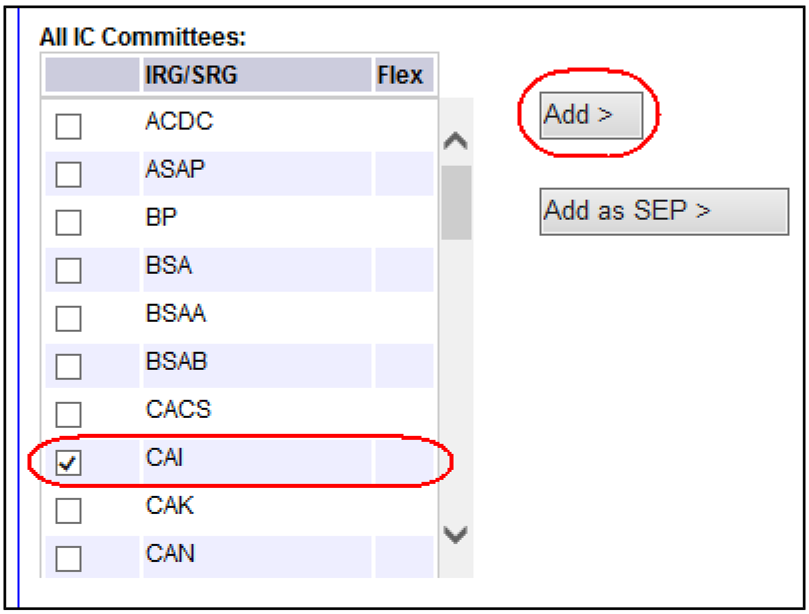


Figure 125: All IC Committees Section on Manage Cluster Components Screen

2. To add an IC Committee as a SEP, select the appropriate check box and click the **Add as SEP** button .

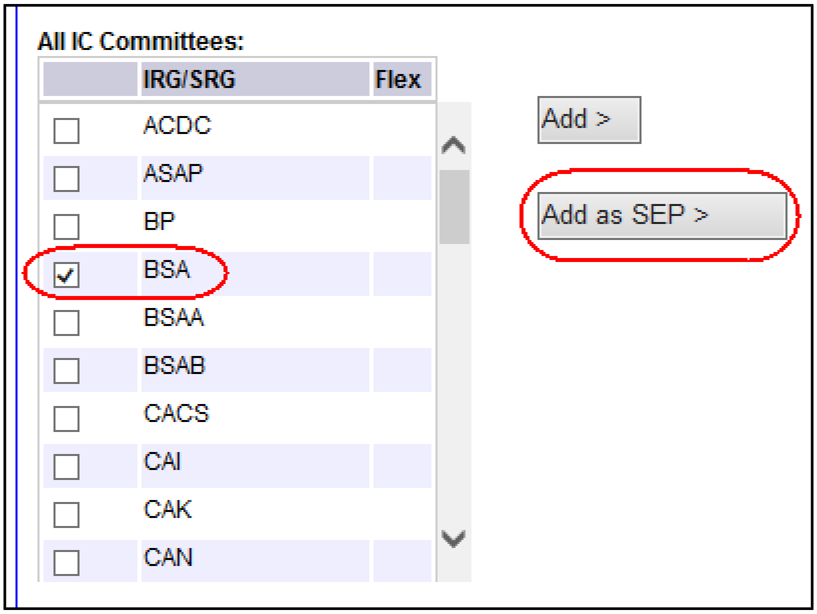


Figure 126: All IC Committees Section on Manage Cluster Components Screen

The system adds the IC Committee and/or the SEP IC Committee to the **Components** list.

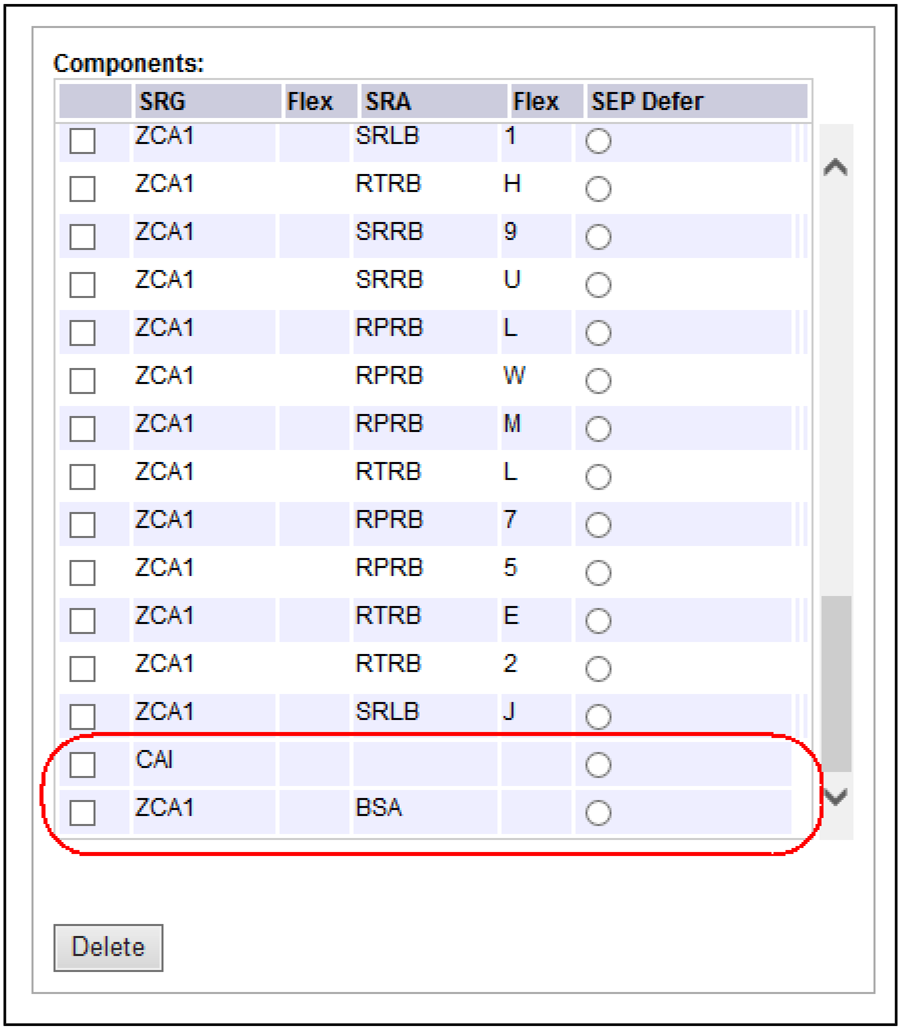


Figure 127: Components Section on Manage Cluster Components Screen

3. To add a SEP, select the appropriate check box and click the **Add** button.

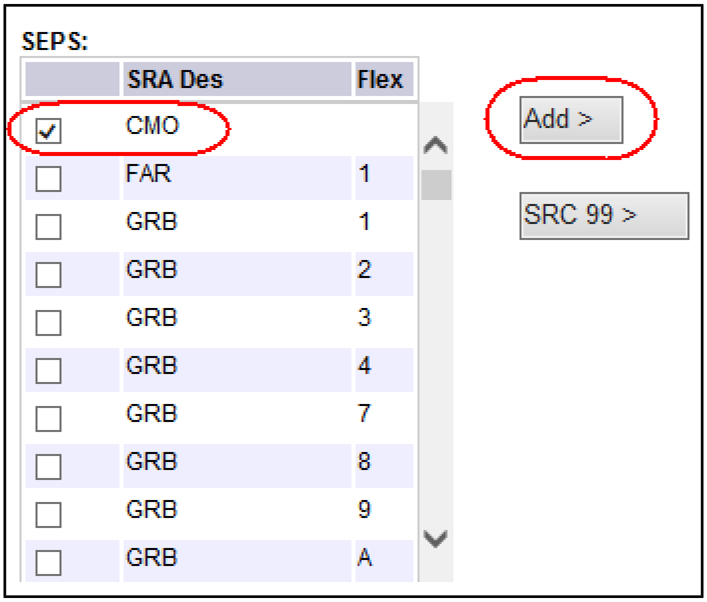


Figure 128: SEPS Section on Manage Cluster Components Screen

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.

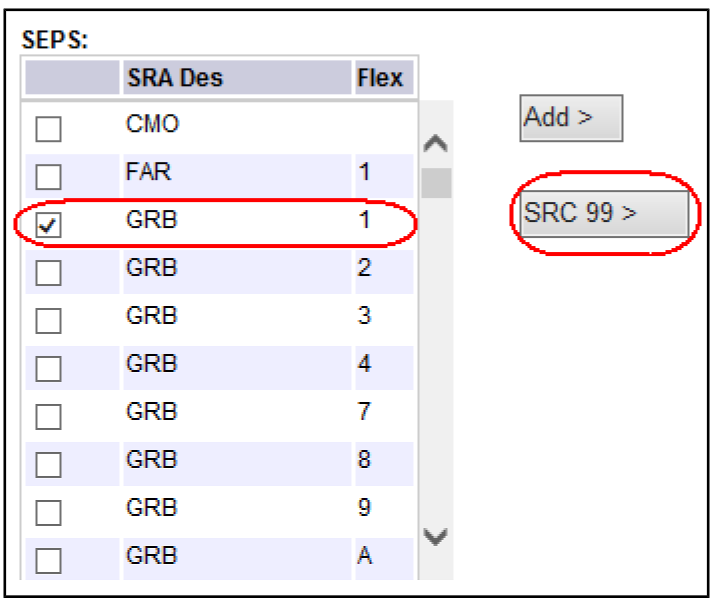
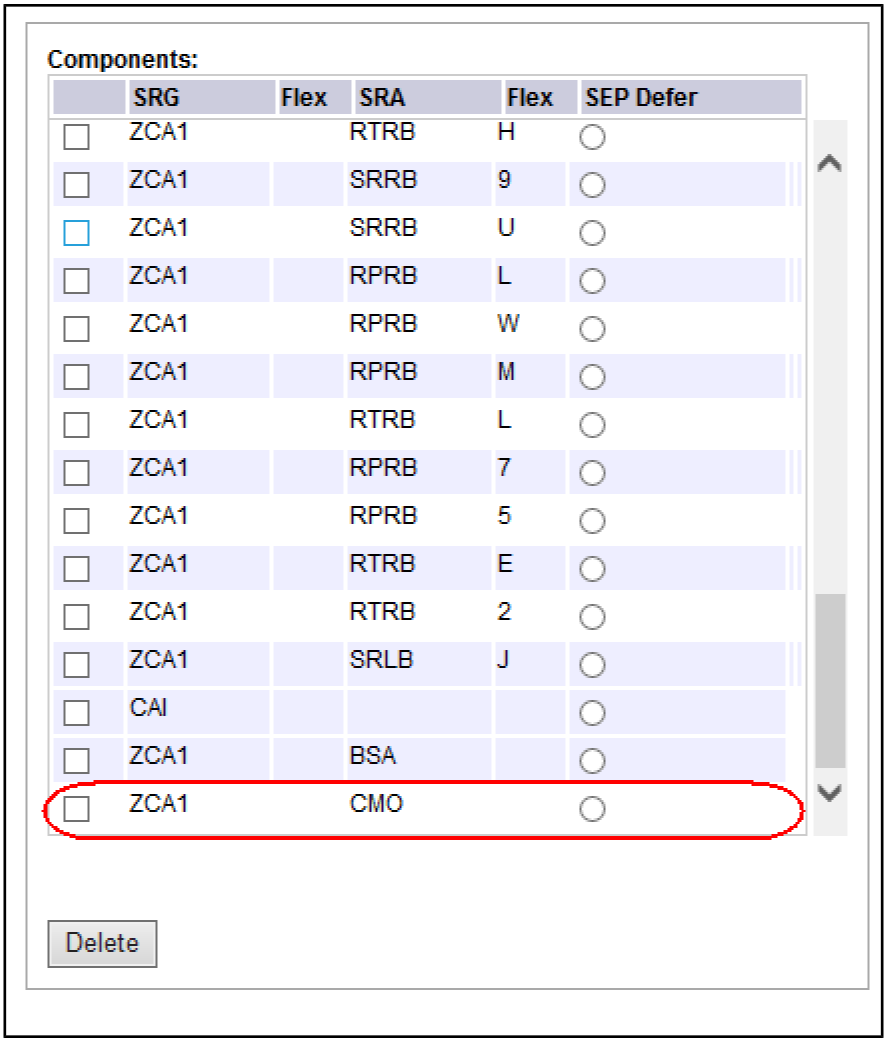


Figure 129: SEPS Section on Manage Cluster Components Screen

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.



Components:

	SRG	Flex	SRA	Flex	SEP Defer
☐	ZCA1		RTRB	H	○
☐	ZCA1		SRRB	9	○
☐	ZCA1		SRRB	U	○
☐	ZCA1		RPRB	L	○
☐	ZCA1		RPRB	W	○
☐	ZCA1		RPRB	M	○
☐	ZCA1		RTRB	L	○
☐	ZCA1		RPRB	7	○
☐	ZCA1		RPRB	5	○
☐	ZCA1		RTRB	E	○
☐	ZCA1		RTRB	2	○
☐	ZCA1		SRLB	J	○
☐	CAI				○
☐	ZCA1		BSA		○
☐	ZCA1		CMO		○

Delete

Figure 130: Components Section on Manage Cluster Components Screen

6. To delete an IRG Cluster Component, select the appropriate component's check box and click on the **Delete** button.

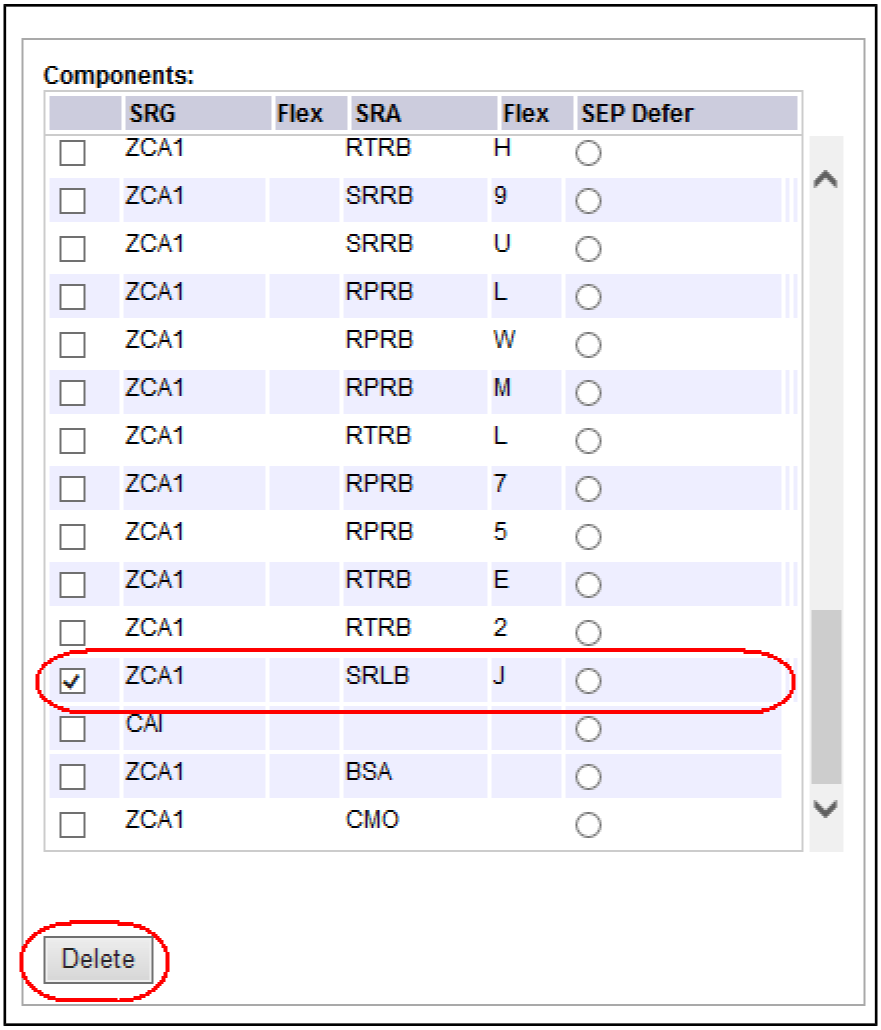


Figure 131: Components Section on Manage Cluster Components Screen

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

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

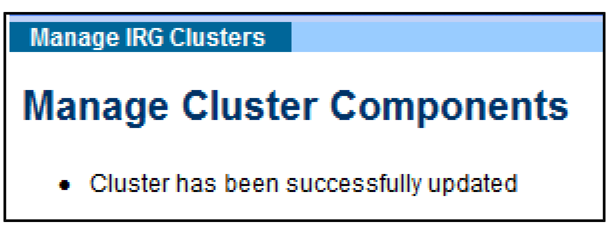


Figure 132: Manage Cluster Components Screen with Successfully Saved Message

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.*

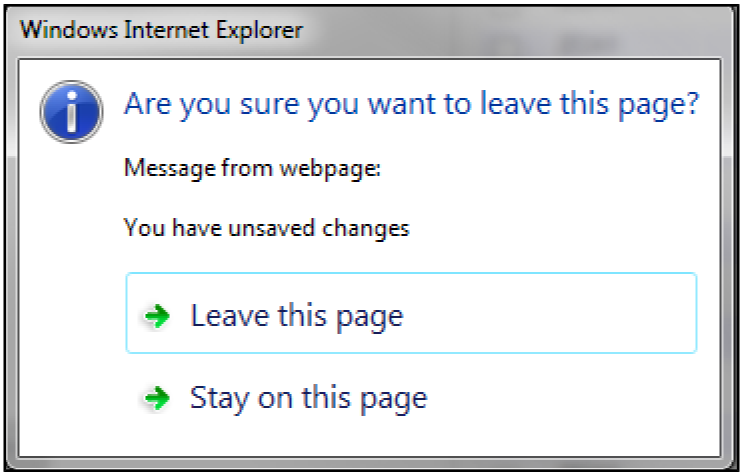


Figure 133: Warning Pop-up Message Screen

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

AMS includes the following reports capabilities:

- All Users Report — Information on all users in your organization
- Inactive Users Report — lists user accounts that have been locked due to inactivity (**note**: for internal users only)
- Deactivated Users Report — lists user accounts that have been deactivated by an administrator (**note**: for internal users only)

To open the reporting functions, click the **AMS User Reports** tab.

The *All Users Report* screen opens. There are two versions of this screen, as shown below. The version you see depends on the organization you belong to.

9.1 All Users Report Screen for External Users

All Users Report screen for Commons, external iEdison, and State Department users

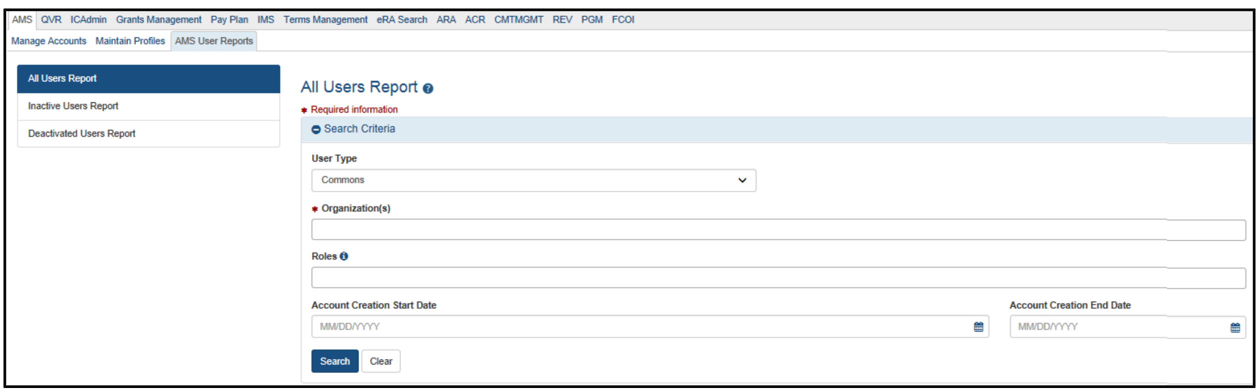


Figure 134: All Users Report Screen for External Users

Use this screen to run an All Users Report on external users.

The **All Users Report** button is preselected by default, as shown below. Follow the steps below to launch the report.

1. Select "Commons" in the **User Type** field and set the search criteria in the other fields as follows:

2. **Organization** — This field displays your organization name. Service Desk agents, to select an organization, begin typing its name or ID number in this field. The live search function displays organization names as you type. When the one you want appears, scroll down and click to select it, as shown below. (**note**: To select multiple organizations, hold the <Ctrl> key as you click.) **Note:** This field is mandatory.

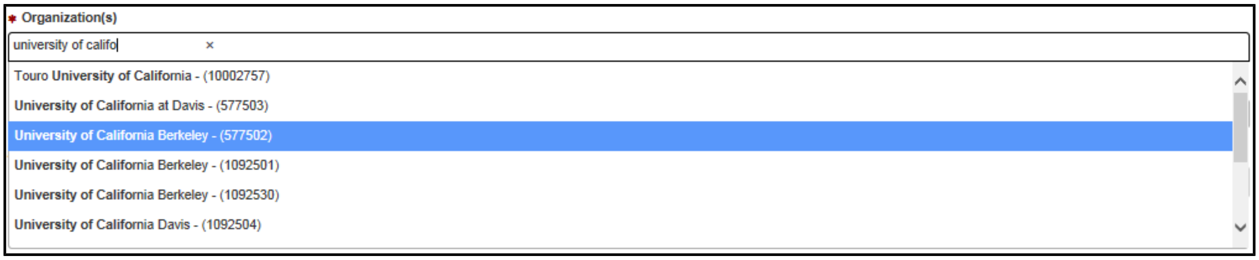
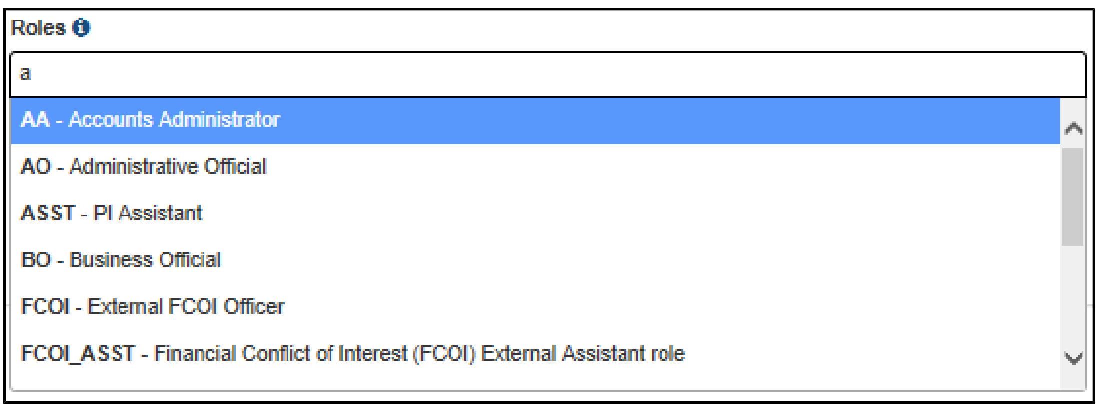


Figure 135: Organization field, external

3. **Roles** — Leave this field blank to report all user roles. To limit the report to one or more user roles, click this field to open the drop-down menu or begin typing the name of a role. The live search function displays roles as you type. When the one you want appears, scroll down and click to select it, as shown below. (**Note**: To select multiple roles, hold the <Ctrl> key as you click.)



4. **Account Creation Start Date/End Date** — Leave these fields blank to report all time periods. To limit the report to a certain time period, enter a start date, end date, or start and end dates. Enter dates in MM/DD/YYYY format or click the calendar icon to select them from the calendar.
5. When you finish entering search criteria, click **Search** to run the report. See Report Output below.

9.2 All Users Report Screen for Internal Users

All Users Report screen for Agency and iEdison Agency/ERL users

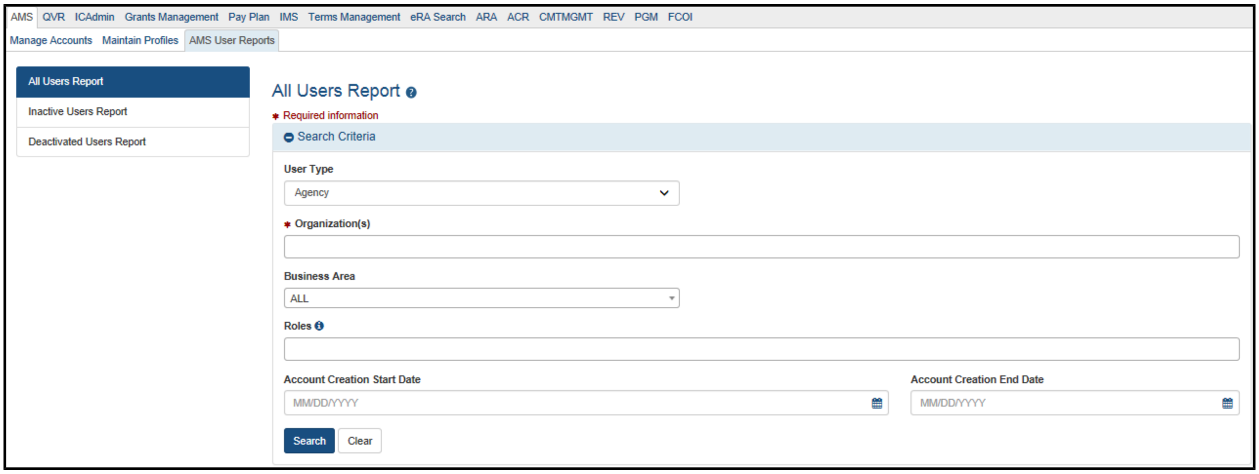


Figure 136: All Users Report Screen for Internal Users

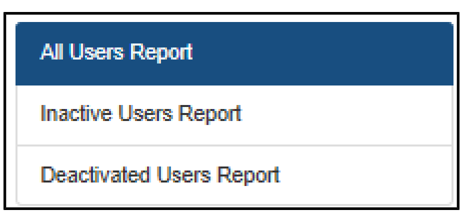
Use this screen to run these types of reports on internal users:

- All Users Report — Information on all users in your organization
- Inactive Users Report — for user accounts that have been locked due to inactivity (no activity for 120 days)
- Deactivated Users Report — for user accounts that have been deactivated by an administrator

9.3 All Users Report for Internal Users

Follow the steps shown here to run an All Users Report for internal users:

1. Click the All Users Report button:



2. select "Agency" in the **User Type** field and set search criteria in the other fields as follows:
3. **Organization** — IC users, this field displays your organization name. Service Desk agents, to select an organization, click this field to open the drop-down menu or begin typing the organization name or two-letter code. The live search function displays organization names as you type. When the one you want appears, scroll down and click to select it, as shown

below. (**Note**: To select multiple organizations, hold the <Ctrl> key as you click). **Note:** This field is mandatory for the All Users Report.

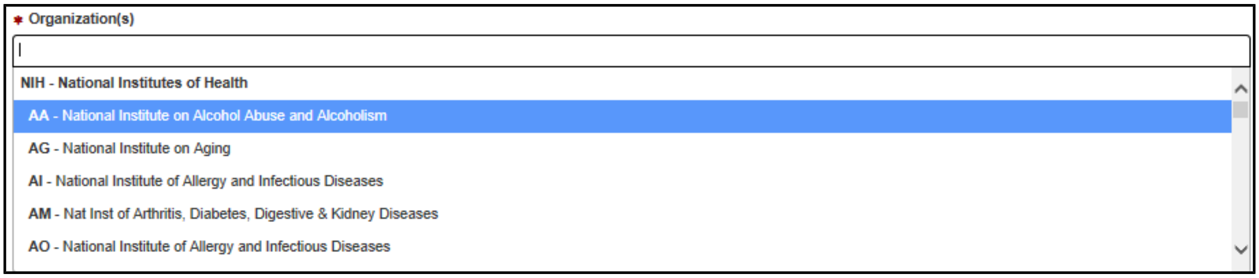


Figure 137: Organization field, internal

4. **Business Area** — This field defaults to "All" business areas (that is, all eRA modules and systems). To limit the report to users of one or more business areas, click this field to open the drop-down menu and scroll down and click to select a business area, as shown below. (**Note**: To select multiple areas, hold the <Ctrl> key as you click.)

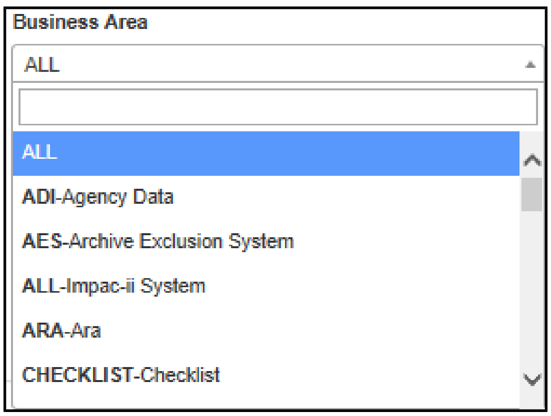


Figure 138: Business Area field

5. **Roles** — Leave this field blank to report all user roles. To limit the report to one or more user roles, click this field to open the drop-down menu or begin typing the name of the role. The live search function displays roles as you type. When the one you want appears, scroll down and click to select it, as shown below. (**Note**: To select multiple roles, hold the <Ctrl> key as you click.).

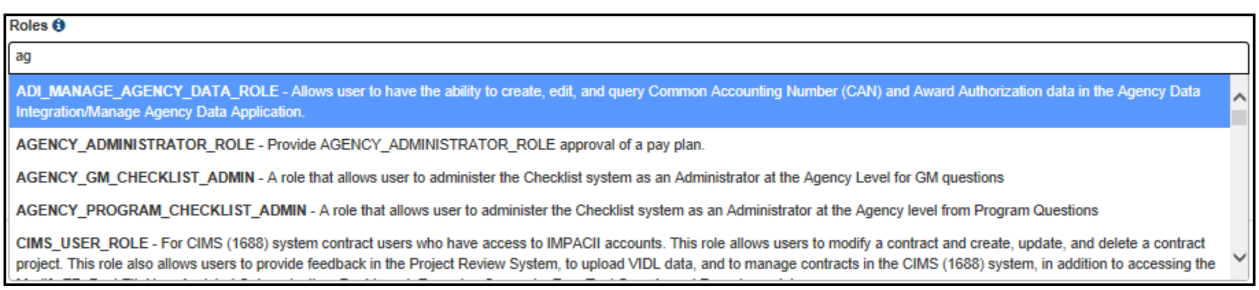


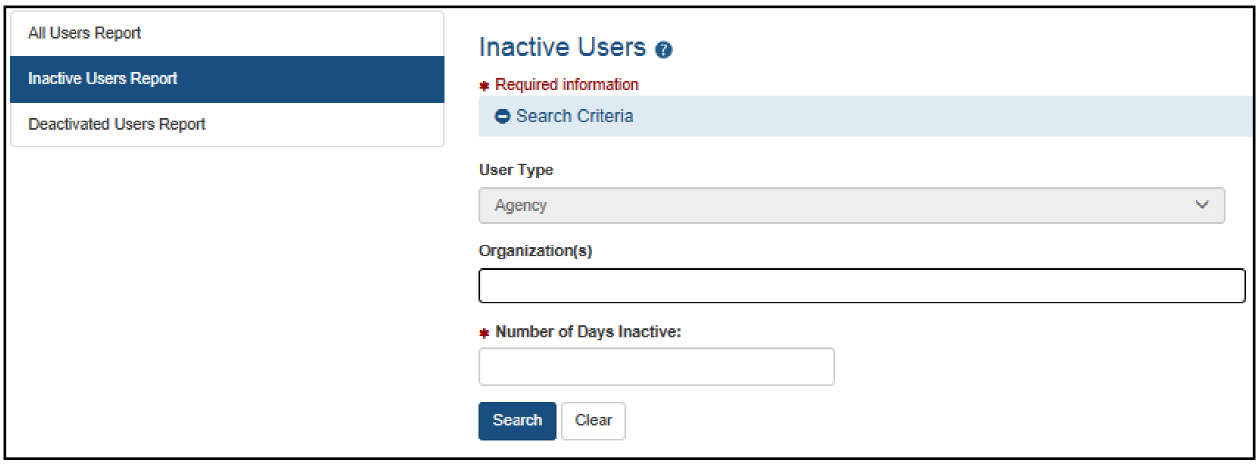
Figure 139: Roles field

6. **Account Creation Start Date/End Date** — Leave these fields blank to report all time periods. To limit the report to a certain time period, enter a start date, end date or start and end dates. Enter dates in MM/DD/YYYY format or click the calendar icon to select them from the calendar.
7. When you finish entering search criteria, click **Search** to run the report. See Report Output below.

9.4 Inactive Users Report

Follow these steps shown below to run an Inactive Users Report for internal users:

1. Click the **Inactive Users Report** button, as shown below



2. The **User Type** field is automatically set to "Agency." Enter search criteria in the other fields as follows.
3. **Organization** — For IC users, this field displays your organization name. Service Desk agents, by default the search will include all organizations, but to limit it to one or more organizations, click this field to open the drop-down menu or begin typing an organization name or two-letter code. The live search function displays organization names as you type. When the one you want appears, scroll down and click to select it. (to select multiple organizations, hold the <Ctrl> key as you click). **Note**: This field is optional for the Inactive Users Report.

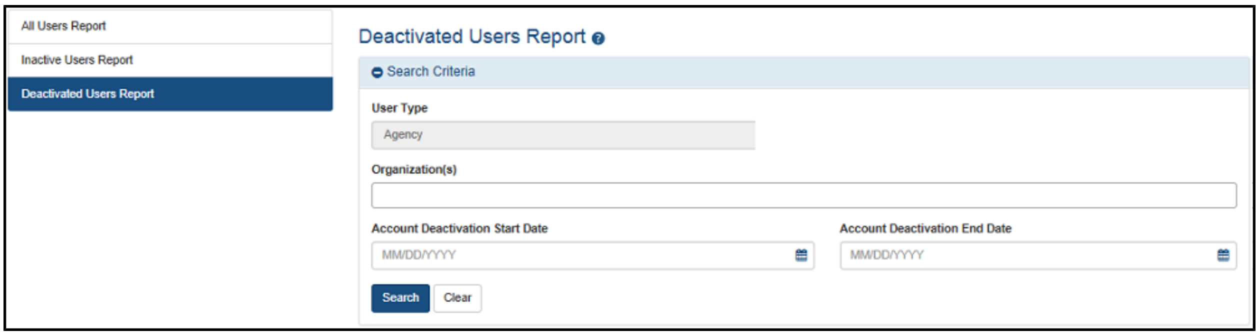
4. **Number of Days Inactive**— Enter the minimum of days of inactivity for users to be included in the report. **Note**: After 120 days of inactivity, the system will automatically lock the account.

When you finish entering search criteria, click **Search** to run the report. See Report Output below.

9.5 Deactivated Users Report

Follow the steps shown below to run an Deactivated Users Report for internal users:

1. Click the **Deactivated Users Report** button, as shown below.



2. The **User Type** field is automatically set to "Agency, but enter search criteria in the other fields as follows.
3. **Organization** — For IC users, this field displays your organization name. Service Desk agents, by default the search will include all organizations, but to limit it to one or more organizations, click this field to open the drop-down menu or begin typing an organization name or two-letter code. The live search function displays organization names as you type. When the one you want appears, scroll down and click to select it. (to select multiple organizations, hold the <Ctrl> key as you click). **Note**: This field is optional for the Deactivated Users Report.
4. Account Deactivation **Sart Date /End Date** — By default the report returns all deactivated users, but too limit the report to users who were deactivated during a certain time period, enter a start date, end date, or start and end dates. Enter dates in MM/DD/YYYY format or click the calendar icon to select them from the calendar.
5. When you finish entering search criteria, click **Search** to run the report. See Report Output below.

9 Report Output

9.6 All Users Report

To run the All Users report, click the **All Users report** button and enter search criteria [as described above](). When you click the **Search** button for the All Users report, the report output displays. There are two versions of this report, as shown below. The version you see depends on the organization you belong to.

All Users Report output for Commons, external iEdison, and State Department users.

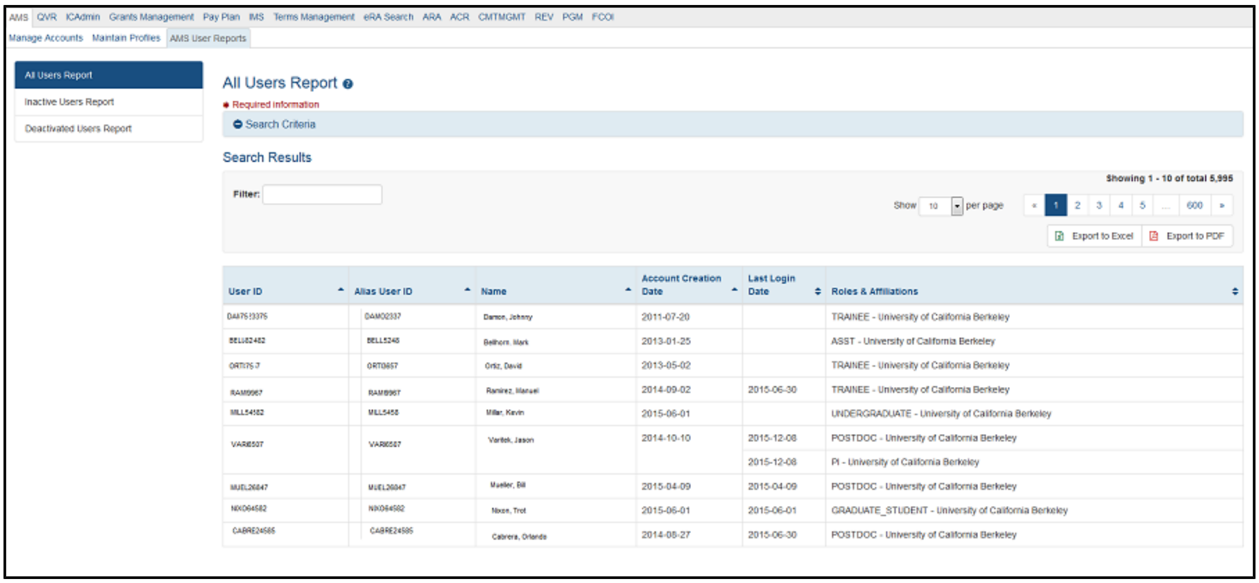


Figure 140: All Users Report output for external users

All ***Users Report*** output for Agency and iEdison Agency/ERL users. .

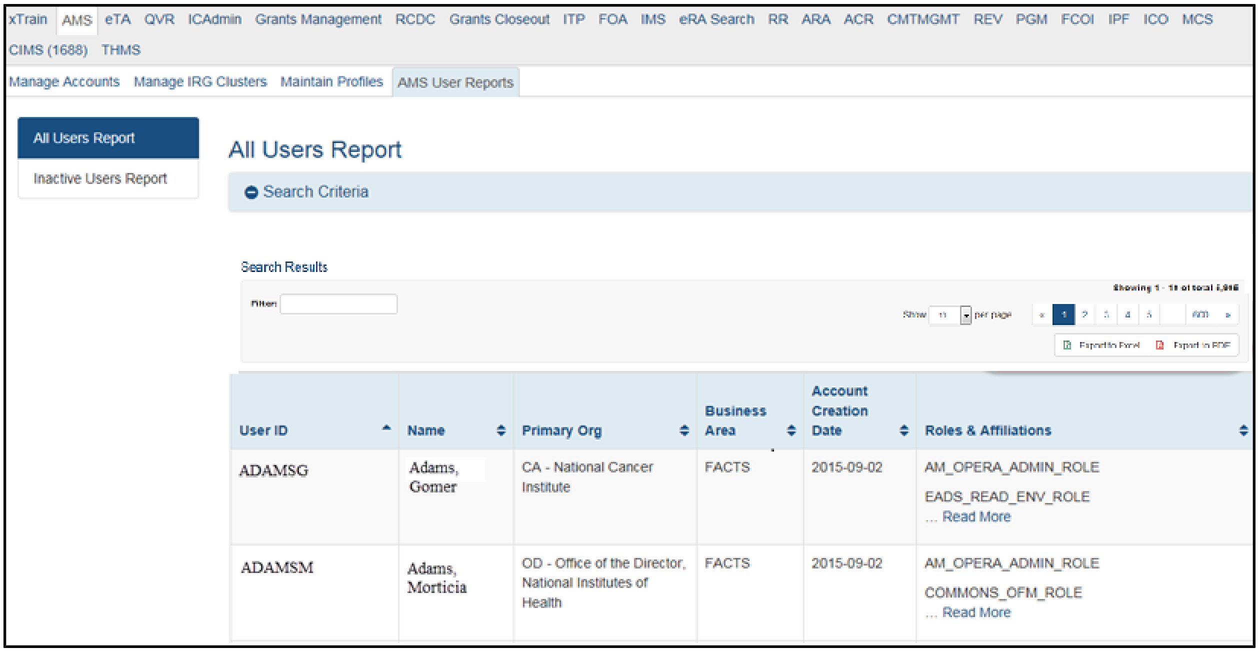


Figure 141: All Users Report output for internal users

9.7 Inactive Users Report

Note: This report is only available for internal users.

When you click the **Search** button for the Inactive Users report, the report output displays, as shown here.

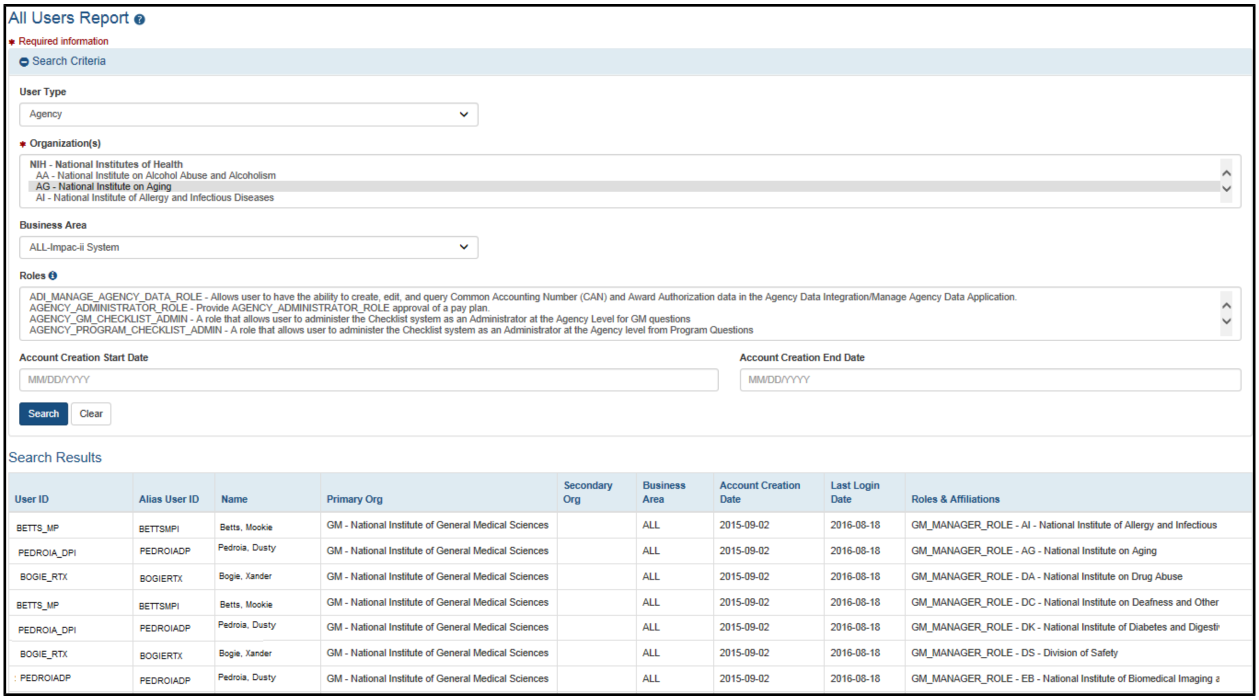


Figure 142: Inactive Users Report output

The report includes the following columns: User ID, Alias User ID, Name, Primary Org, Secondary Org, Business Area, Account Creation Date, Last Login Date, Roles and Affiliations.

9.8 Deactivated Users Report

Note: This report is only available for internal users.

When you click the **Search** button for the Deactivated Users report, the report output displays, as shown here.

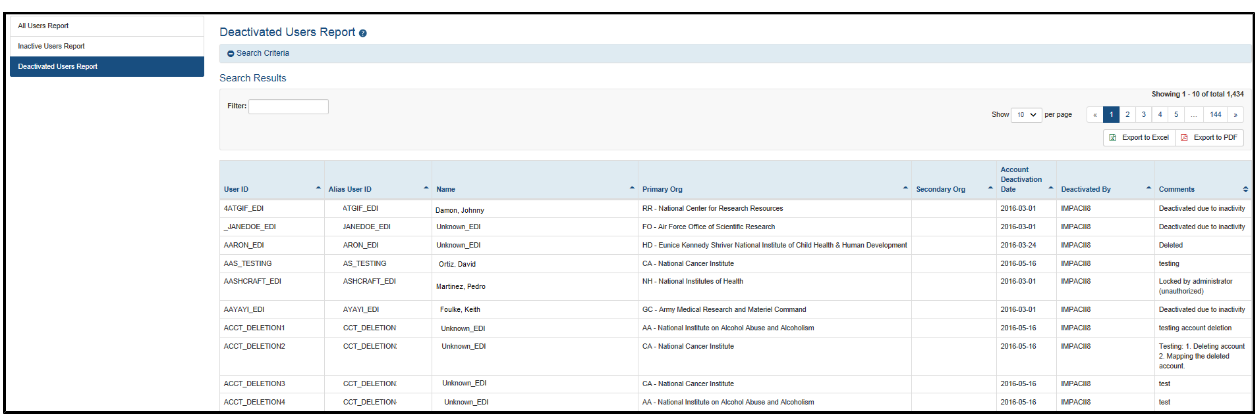


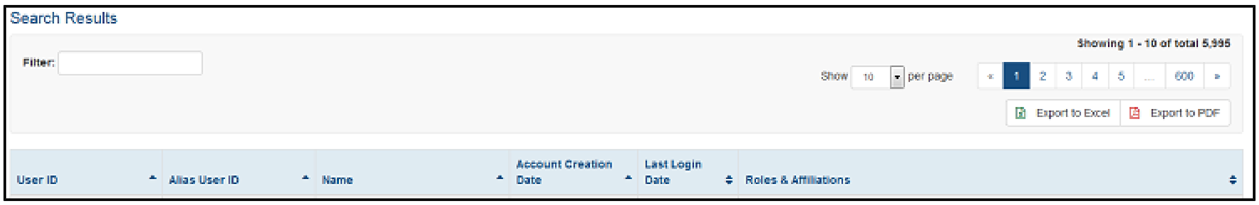
Figure 143: Deactivated Users Report output

The report includes the following columns: User ID, Alias User ID, Name, Primary Org, Secondary Org, Account Deactivation Date, Deactivated By, Comments.

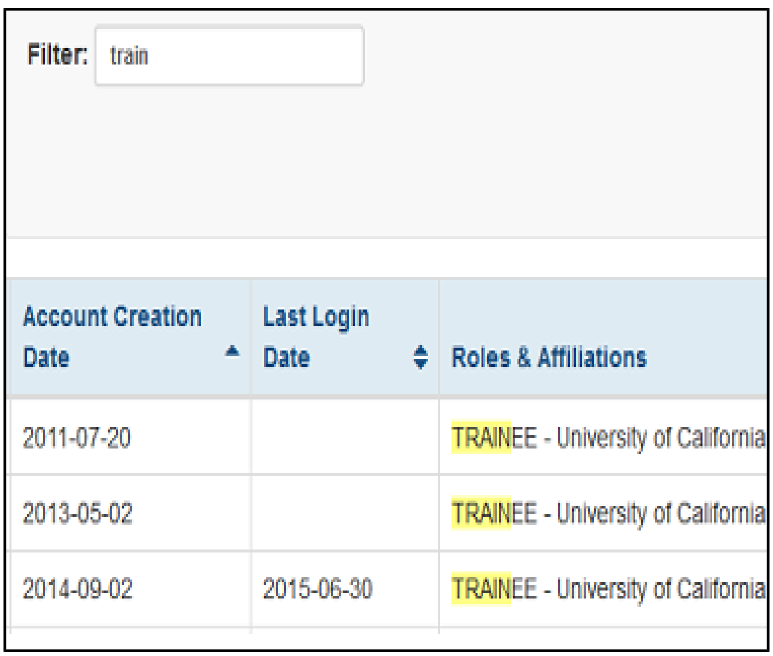
9.9 *Navigating the report output*

These tips for browsing, filtering and exporting the report output apply to all report types.

The report output displays include the controls shown here.



- To filter the report, type some text in the **Filter** field, such as a name. All instances of the filter text in the report output will be highlighted in yellow, as shown below:



- To adjust the number of records displayed, select a number in the **Show per page** drop-down menu.
- To navigate the report pages, click a **Page Number** or use the left and right arrow buttons.
- To re-sort the report columns in ascending or descending order, click the up/down arrows in the column headers.

- To export the report output as an Excel spreadsheet or PDF, click the appropriate **Export** button, shown here:

  - **Export to Excel**

When you click this button, an open-or-save dialog opens, as shown here.

Click **Open** to open the report data in Excel. A new Excel window opens Go to it and click the **Enable Editing** button in the yellow bar at the top of the worksheet, then work with the spreadsheet as usual.

  - **Export to PDF**

Click this button to save the report as a PDF file. A save dialog opens. Choose a location and save the file.

10 eMail Notifications

There is an automated nightly job that checks the date that **internal** NIH users last accessed the system and takes the following actions:

1. If the user has not logged into an eRA module for 120 days, 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, the account status is set to *Inactive*.

The following email notifications are sent to the account owner:

- Reminder Notice – sent 4 weeks, 2 weeks, and 1 day prior to deactivation
- Notice of Deactivation – sent when the account is deactivated

There is a column in the search results' hit list titled **Recertification Date** so that users can re-certify the user accounts to be active for an extended period of time.

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.

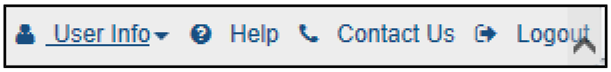


Figure 144: Logout Button

12 Error Messages

12.1 Search Account Error Messages

Condition	Error Message
No records are found	*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.*
Search results exceed 500 records	*Maximum number of 500 results exceeded. Please try to limit your search by adding more search parameters.*
Data is not entered in one additional field besides **User Type**	*You must enter at least one search field, in addition to User Type.*
Only one character is provided in the **Last Name** field	*Last name should be 2 or more characters long.*
Less than 3 characters are entered in the **User ID** field	*User ID, should be 3 or more characters long.*

Table 3: Search Account Error Messages

12.2 Validate Certificate Errors

Condition	Error Message
The browser call did not go through to the certificate provider	Message content is specific to the type of browser.
The browser call does go through to the certificate provider, but the mapping does not exist.	*Validation is successful but certificate mapping does not exist for the user.*
The browser call does go through to the certificate provider, but the mapping is incorrect.	*Validation is successful but the certificate mapping does not match the user entered details.*

Table 4: Validate Certificate Screen Errors

12.3 Create Account Errors

Condition	Error Message
An attempt to create a FACTS account without the appropriate privileges.	You do not have sufficient privileges to grant (FACTS_SDC_MGR_ROLE) to this organization (United States).

Table 5: Create Account Errors