Transcript – How an SO Creates Accounts

Welcome to this tutorial on How Signing Officials Create Accounts in eRA Commons.

This video will highlight the steps a Signing Official, SO, needs to take to create a new account in eRA Commons.

With an institution successfully registered with eRA Commons, the SO can create new accounts for Principal Investigators, or PIs, and or affiliate an existing PI account to their institution.

When an SO goes to create a new account for a PI, the first step is to make sure the PI does not already have a Commons account, regardless of the institution that created it.

This is an important step because a PI should have only one Commons account throughout their research career.

Here are the steps for the SO to search for a PI in eRA Commons…

1. Select the Accounts tab from within the Admin module.

2. From within Accounts, select the Advanced Search tab to display the Account List screen.

3. Enter the search criteria. The percent sign (%) may be used as a wildcard (e.g., Sm%).

The Search within your institution field is checked as a default and means that Commons will only search for matching records within your institution.

To include accounts outside of your institution, uncheck this field before performing the search.

NOTE: When searching outside of your organization, you must include the Last Name or Commons ID in your search criteria.

4. Select the Search button.

If the PI is found to have a Commons account already, they can affiliate the PI to their institution.

To do this option, the SO will click the Create Affiliation link in the Action column of the search results.

The system will display the Modify Account screen.

To affiliate the account, add the Role and the Organization (affiliation) by using the look up option for each.

Click the Add link to add the new role and affiliation. To save the changes, click the Save button.

If no PI is found through the search, the SO can now create the account for the PI by following these steps:

1) Select the Accounts tab from within the Admin module.

2) Select the Manage Accounts option.

The Search Accounts screen opens in a separate window. You'll notice that the Create Account button is disabled.

You cannot create a new account until you perform a search on the account first.

 This measure is in place to help avoid the creation of duplicate accounts.

3) Search for the person whose account you are creating.

After performing the search, the Create Account button becomes enabled.

4) Select the Create Account button. The Create Account screen displays.

The User Type should be defaulted to Commons and the Organization should default to that of your own.

These fields can be updated if necessary.

5) On the Create Account screen, enter the Personal Information in the appropriate fields.

Note that all fields except Middle Name are required.

6) After entering Personal Information, you can assign a role to the account.

Use the look-up tool for Role by selecting the magnifying glass for that field.

In a separate window, the Select Role screen opens showing all roles available for assigning to that user type.

7) Select the Save button to complete the process.

8) Optional: If necessary, you can use the Delete link to remove unwanted roles.

This concludes this tutorial on How Signing Officials Create Accounts in eRA Commons.

Thank you for watching.