



PCCD Egrants Agency User Manager Help Guide

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Table of Contents

Purpose of this Document	3
Approving New Requests.....	3
Work Manager.....	3
User Management.....	4
Administration Agency Request Detail.....	5
Maintaining existing security.....	6
Add Role Access.....	7
Selected Grant access.....	7
All Project Access.....	8
Modify Existing Access.....	8
Remove Role Access	8
Mark user as Inactive.....	9

Purpose of this Document

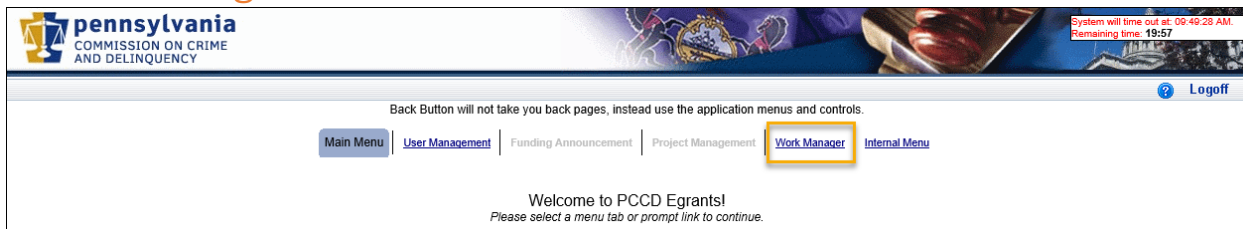
The purpose of this document is to provide instructions for users having the Agency User Manager security role in PCCD Egrants and how to approve requests as well as maintaining existing security for users already established within their agency.

Approving New Requests

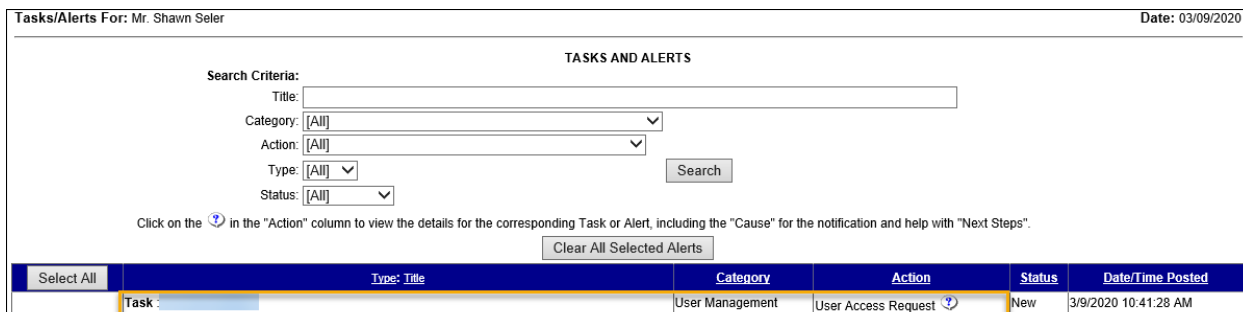
Newly registered users for an agency have the ability to request access to their organization online. These requests for access will only be granted when an agency has a designated Agency User Manager (User Manager).

When an online request for security is created, any user with the User Manager security role will receive a notification in their Egrants Work Manager queue. This can be found by clicking on the Work Manager menu option on the page. A Users' Work Manager should be periodically checked for new notifications.

Work Manager



Within the Work Manager, the User Manager should see a notification with the category of “User Management” and action of “User Access Requested”. The User Manager also has the option of using the Search Criteria fields to filter for this specific notification.



This notification will appear as a task. This means that this notification cannot be cleared until the action required by this notification is completed. In this case, the required action will be to approve the request. Clicking on the help icon will take the User Manager to a detail page providing further information.

NOTIFICATION DETAILS

Reference Number: 2802.2-0111
Type: Task
Category: User Management
Action: User Access Request
Cause: An external user is Requesting access to an Agency.
Next Steps (if any): Review the request and approve or deny the users request.
Title: [REDACTED]
Date/Time Posted: 3/9/2020 10:41 AM
Status: New

From the Search page, or the Notification Detail page, the User Manager should click on the task title to navigate to the User Access Request Details page.

User Management

The other way to see if there are pending requests for access is to click on the User Management menu, then click on the Administration Requests sub-menu.

System will time out at: 09:51:38 AM. Remaining time: 19:57

Back Button will not take you back pages, instead use the application menus and controls.

Main Menu | **User Management** | Funding Announcement | Project Management | Work Manager | Internal Menu
 Profiles Access Requests | **Administration Requests** | Administration User Maintenance

ADMINISTRATION REQUEST SEARCH

Search Criteria:

Agency Name: [All]

Grant ID:

Requestor Last Name:

Requestor First Name:

Request Status: In-Process

Search

No records found!

Agency	GrantID	Requestor Last Name	Requestor First Name	Date Submitted	Request Status
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The Administration Request Search page will automatically attempt to show any requests that are currently In-Process (pending approval) by the User Manager.

ADMINISTRATION REQUEST SEARCH

Search Criteria:

Agency Name: [All]

Grant ID:

Requestor Last Name:

Requestor First Name:

Request Status: In-Process

Search

Agency	GrantID	Requestor Last Name	Requestor First Name	Date Submitted	Request Status
PA Commission On Crime & Delinquency	[ALL]	[REDACTED]	[REDACTED]	3/9/2020 10:41:00 AM	In-Process

Click on the Requestor Last Name to view the details of the request.

Administration Agency Request Detail

On the Request Detail page, the User Manager has the responsibility of approving or Denying the request. They should review the reason for the request entered by the user and review the grant access being requested. A user has the option of requesting access to selected grants or all grants.

ADMINISTRATION AGENCY REQUEST DETAIL

User ID: 1008
Requestor Name: [Redacted]
Agency Name: PA Commission On Crime & Delinquency
Reason for Request: Testing
User Manager Comments: *

Action Requested	Grant ID	Current Roles Requested	Approve/Deny *
Add	[All]	Agency Financial Creator	[Dropdown]
Add	[All]	Agency Program Creator	[Dropdown]

The User Manager is required to provide a comment in the User Manager Comments box and choose to approve or deny a request for access in the drop down box. When complete, click the save button at the bottom of the page.

ADMINISTRATION AGENCY REQUEST DETAIL

User ID: 1008
Requestor Name: [Redacted]
Agency Name: PA Commission On Crime & Delinquency
Reason for Request: Testing
User Manager Comments: *
The Financial Creator Role has been Approved, but the Program Creator is not authorized.

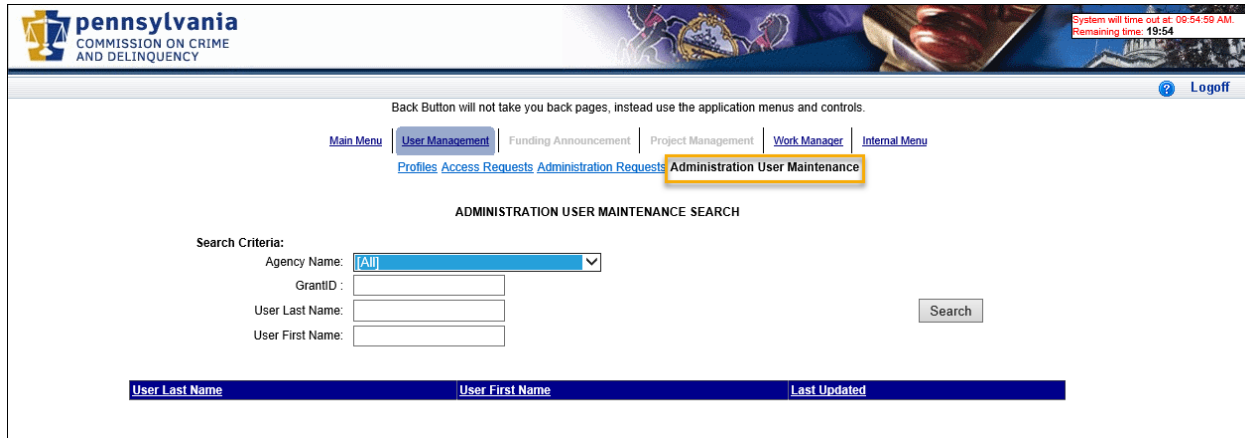
Action Requested	Grant ID	Current Roles Requested	Approve/Deny *
Add	[All]	Agency Financial Creator	Approve [Dropdown]
Add	[All]	Agency Program Creator	Deny [Dropdown]

When the request has been approved/Denied, the Work Manager task will automatically be removed.

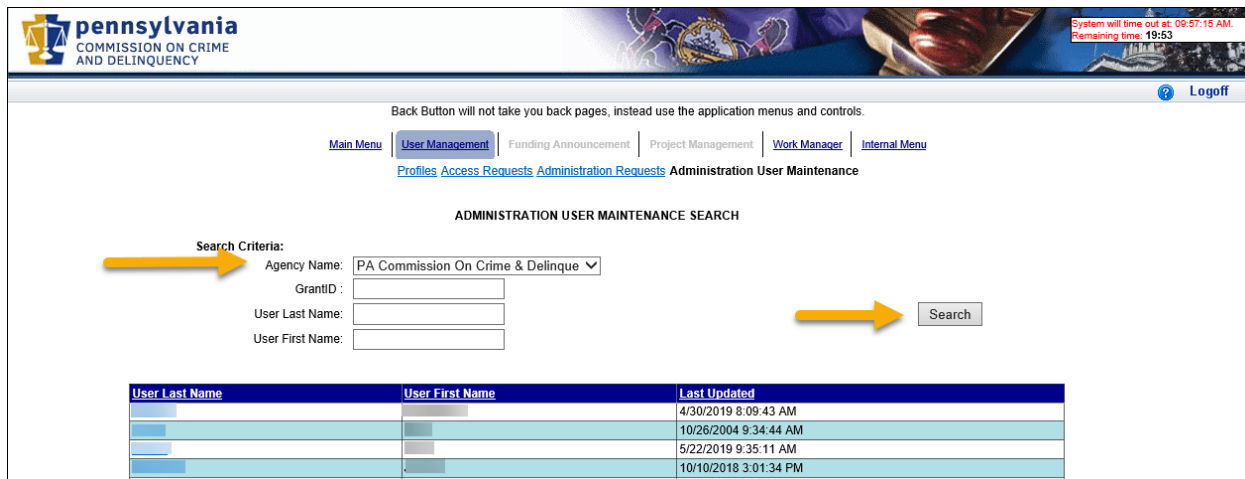
Once the change has been made, the user will need to log off Egrants and log back on for the changes to take effect.

Maintaining existing security

To maintain security for users already established within an organization, the User Manager will need to click on the User Management menu, then click on the Administration User Maintenance sub-menu.



To search for users associated within your agency, select the organization from the Agency Name drop down list, and click the Search button. (Alternatively, you may search for a specific user by name, or users with access to specific grants.)



You will see a listing of all users that are currently associated to the agency, based on the search criteria entered. To select one of the users to maintain their access, click on the users' last name, which appear as a link.

This will take you to the Administration Agency – Role Maintenance page. On this page, you may add roles, take away specific grant roles, remove all roles of a user, and/or mark the user as inactive to prevent them from logging into Egrants.

Add Role Access

To add an additional role to a users' account, from the Administration Maintenance – Role Maintenance page, in the “Assign Roles” section, select the agency to which roles will be assigned and select the name of the role from the drop-down list. Click on the Add Access button when the agency and role have been selected.



This will add a new row to the table that contains the list of existing security roles. This row will be expanded to show all grants that are currently associated to the selected agency.

There are two options for granting security: Selected Grant access and All Projects access.

Selected Grant access

The User Manager may only want a user to have access to specific grants. In this case, the User Manager will select grants in which the user should have access. When all applicable grants have been checked, click on the Update button. When all necessary roles have been added, click on the Save button at the bottom of the page.

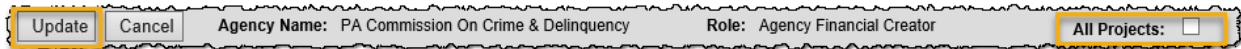
'. A table with two columns, 'Action' and 'Grant ID', is shown. The 'Action' column contains a list of checkboxes. Above the table are buttons for 'Select All' and 'Remove All'. A yellow arrow points to the 'Update' button. At the bottom of the table, there is a blue bar with the numbers 1 through 12." data-bbox="115 495 875 854"/>

The user will need to log off Egrants and log back on for the changes to take effect.

All Project Access

The User Manager has the option of granting access to all grants for the selected role and organization. This will ensure access to all current and future grant applications submitted by an organization.

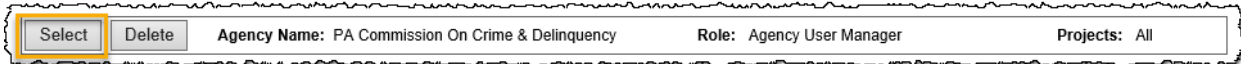
To grant All Project access, the User Manager should place a checkmark next to the All Projects checkbox then click the Update button.



Click on the Save button at the bottom of the page. Once saved, the user will need to log off Egrants and log back on for the changes to take effect.

Modify Existing Access

The User Manager may modify the access of a role that is assigned to a user by clicking on the Update button next to the role they wish to modify.



This will expand the row to show the users current access. From this view, the User Manager may add additional grant roles, remove assigned grant roles, or change how roles are assigned.

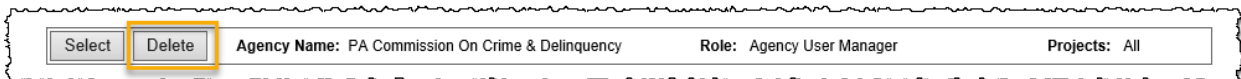
- If the All Projects checkbox is selected, the grants in the table will automatically be selected, and the checkboxes next to the Grant ID's will be disabled. Deselecting the All Projects checkbox will allow the User Manager to select specific grants.
- If the All Projects checkbox is not selected, the User Manager may choose to select the All Projects checkbox if they wish to give access to ALL current and future grants. The User Manager may also choose to grant additional access to grants in the list. In addition, the User Manager may also remove access to a specific grant by removing the checkmark next to the Grant ID.

When all changes have been made, click on the Update button and then the Save button at the bottom of the page.

The user will need to log off Egrants and log back on for the changes to take effect.

Remove Role Access

To remove all access for a specific role, on the Administration Agency - Role Maintenance page, click on the Delete button next to the role.



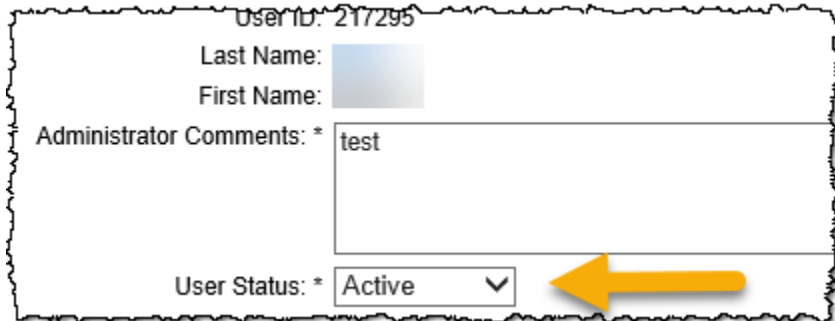
You will then be prompted to confirm deletion of the role.

Once all deletions have been made, click the Save button at the bottom of the page.

The user will need to log off Egrants and log back on for the changes to take effect.

Mark user as Inactive

To mark a user as inactive and prevent the user from logging into PCCD Egrants, change the value in the User Status drop down list from Active to Inactive, then click the Save button at the bottom of the page.



The screenshot shows a user management form with the following fields:

- User ID: 217295
- Last Name: [Redacted]
- First Name: [Redacted]
- Administrator Comments: * test
- User Status: * Active [Dropdown arrow]

A yellow arrow points to the 'Active' dropdown menu in the 'User Status' field.

For security purposes, if a person is no longer with your organization, it is the responsibility of the Agency User Manager to prevent unauthorized access to the account. To do so, PCCD recommends when a person leaves the agency (Retirement, Death, New Job, etc.) that the User Manager removes all access currently assigned to that person, and marks the User Status as Inactive before clicking the Save button at the bottom of the page.