Reauthorization Project
Authorized Account Approver (AAA)

NOAA Grants Online Program Management Office

October 2018 (c)
Version 4.26
## Table of Contents

Overview .............................................................................................................................................. 5
Navigate to AAA Functions .................................................................................................................. 7
Access the Available AAA Lists ......................................................................................................... 7
  - List of Users and Role(s) – Always Available .............................................................................. 7
  - List of Users and Role(s) – During the Reauthorization Period .................................................... 8
Execute a Search .................................................................................................................................. 9
  - Search by Organization .................................................................................................................. 9
  - Search by User ............................................................................................................................... 13
Update Status for User Role(s) ......................................................................................................... 15
Help Desk Assistance (Reauthorization Concerns) .......................................................................... 16
Overview

The Grants Online Program Management Office (PMO) has established an official role for all Federal (internal) and Recipient Administrators (external) users who have been authorized to update Grants Online roles and user accounts. This new role is the Authorized Account Approver (AAA). During the next system upgrade (Release 4.26) the AAA role will be added to the profile of internal and external users who currently operate with the authority to update Grants Online roles and user accounts. Release 4.26 is currently scheduled for the last weekend in October 2018.

Because of the increased visibility and importance of the Grants Online system, the Grants Online PMO is fortifying the security and controls for Grants Online user accounts. Annually, during the first quarter and starting in FY 2019, all internal and external AAAs must review and reauthorize their users’ Grants Online access and role(s). Only accounts that have been in existence for longer than six (6) months will be included in the Reauthorization process. If there are multiple AAAs for an organization (internal and external), all AAAs within that organization have access to the same list of users and can see updates made by each other.

At the conclusion of the Reauthorization window of opportunity, the Grants Online PMO will apply the action indicated by the AAA(s). The PMO will research and conduct follow-up to resolve outstanding questions or concerns about user role(s).

Instructions for Federal AAAs

- Federal AAAs should continue to email the Help Desk when they need to modify or add a new role to a user’s account. Please see that last page of this document for the information that should accompany email requests. Because of the anticipated high volume of requests, there will be a longer than normal delay in the Help Desk response.

- When a Federal AAA wants to remove a user account and the associated Grants Online role(s), inform them all delegations should be removed and all open tasks should be reassigned. If the Federal AAA selects AAA Removed from the Status dropdown menu but does not remove all delegations and reassign open tasks, the user and his/her role(s) will not be removed during the post-reauthorization window of opportunity. That user and his/her role(s) will continue to display among the list of active accounts. Additional interaction with the Help Desk will be required.

- For an explanation of Grants Online roles, reference the Explanation of User Roles document. The last page of that document explains the difference between a Certified Program Officer and an Uncertified Program Officer.

- For a cross-reference between Grants Online tasks and the users that are authorized to perform each task, reference the Grants Online User Role document.
Instructions for Grantee AAAs (Recipient Administrators)

- Grantee AAAs (Recipient Administrators) have the authority to add a new role or modify an existing role to a user’s account. Reference the response to the “How do I specify or update a user role?” question in the Recipient Administrator guidance document.

- If the Disassociated Date data element contains a date, that user’s name will not be included on the Reauthorization list.

- To remove a user account and the associated Grants Online role(s), all delegations should be removed and all open tasks should be reassigned. If the AAA selects AAA Removed from the Status dropdown menu but has not completed the two prerequisite actions the user and his/her role(s) will not be removed post-reauthorization. That user and his/her role(s) will continue to display among the list of active accounts.

- If a Recipient has awards from two Department of Commerce Bureaus or Agencies (e.g., NOAA and EDA), there may appear to be duplicate records. To avoid this issue, filter search results by organization ID. Specifically, when conducting a “By User” search, two seemingly duplicate records may be displayed. Further defining the search by specifying an organization name will address the appearance of duplicate records.
Navigate to AAA Functions

While on the Inbox tab, click the **AAA Functions** link on the left-hand navigation pane.

Access the Available AAA Lists

**List of Users and Role(s) – Always Available**

Click the **Get list of current user authorizations** link to view an up-to-date list of users and their role(s) for whom you are the assigned AAA. This link is always available to AAAs and produces a dynamic list of user accounts and the corresponding active role(s) for a user.
List of Users and Role(s) – During the Reauthorization Period
The second section on the screen, Annual Reauthorization, provides a list of all the users and their role(s) for whom you are the assigned AAA. The list in this section is only accessible during the Reauthorization window of opportunity. This static list represents a snapshot in time of the active users & roles generated just prior to the Reauthorization period. The radio buttons,  By Organization and  By User determine the sort order of the list.

- Click the  By Organization radio button, leave the  All Organizations  dropdown menu and the  All Users  dropdown menu in the default state. Click the Search button.

  ~ or ~

- Click the  By User radio button, leave the  All Users  dropdown menu and the  All Organizations  dropdown menu in the default state. Click the Search button.

NOTE: There may be a difference between the list generated when the user clicks the hyperlink below the AAA Functions header and the list generated when a list of users is retrieved using the Annual Reauthorization section of the screen. Again, the list generated using the hyperlink displays a dynamic view of the data; the second list is a static view of the data.
Execute a Search

Search by Organization

1. Click the ⬤ By Organization radio button.

2. Click the ---- All Organizations ---- ▼ dropdown menu. From the resulting list, select the organization that should be the focus of the search. Click the Search button to display all users and their role(s) for the selected organization.

3. The result of clicking the Search button when the search is limited to one organization is displayed in the next image. Typically when a search is limited to one organization, data for multiple users within the organization is displayed. The image (representative of several pages of results) below shows an internal user who is affiliated with the NWS organization and has a Grants Specialist role for several CFDAs.
NOTE: The CFDA may (or may not) be visible when a person has the role of Grants Specialist, Grants Officer or Director. The Threshold may (or may not) be visible when a person has the role of Grants Officer or Budget Officer.

4. To narrow the search to a single user (when an organization was selected) click the ---- All Users ---- ▼ dropdown menu. Select a user from the resulting list. Click the Search button to display the user and his/her role(s).

5. For the purpose of demonstration, the information that is visible when a person with different Grants Online roles performs the search is shown in this step. In all three examples the search was limited to an organization and subsequently to a user within that organization.

- **EXAMPLE 1**
  An internal AAA (member of Grants Management) performs the search. The data that is displayed is that of a user who is affiliated with the NWS organization and has a Grants Officer role for several CFDAs. One line item does not have a CFDA and has a $0.00 Threshold.
• **EXAMPLE 2**
  An internal **Line Office AAA** performs the search. Notice, in this example, there is no data in either the CFDA or the Threshold column. However, if the user had a Budget Officer role, there may be data in the Threshold column.

  ![Example 2 Image]

• **EXAMPLE 3**
  The **Recipient Administrator** performs the search. Notice there is no CFDA or Threshold column.

  ![Example 3 Image]

6. To complete the Reauthorization process, the AAA must specify a status for each row on the screen. By default, the status for each row is AAA Notified. Other options from which the AAA can select are: 1) AAA Disclaimed; 2) AAA Reauthorized; and 3) AAA Removed. Later, in the **Update Status for User Role(s)** section each option available from the Status dropdown menu is explained.

7. When an option is selected for the Status, the information in the following columns (the **Status**, the **Status Date**, and the **Updated By**) is refreshed with new data.
NOTE: The new information visible on the screen does not indicate the user account has been modified. The modification/update of the user account will occur when the window of opportunity to complete Reauthorization for that Fiscal Year closes. Until the Fiscal Year window of opportunity closes, the AAA may change the information for the users’ role(s) assigned to him/her.

8. When the Fiscal Year window of opportunity closes, the Grants Online PMO will do the following for:

- The role with a status of “AAA Reauthorized” – no action
- The role with a status of “AAA Removed” will be deleted (if all delegations have been removed and all open tasks have been reassigned) from the user’s account.

If there are delegations associated with the user role or open tasks, those issues must be addressed. Data will not automatically be deleted when those issues are resolved. Those records will be deleted when the next PMO-generated batch jobs are run (currently an undetermined interval).

- The role with a status of “AAA Disclaimed” or “AAA Notified” require additional research and follow-up.
Search by User

1. Click the By User radio button.

![Screenshot of the By User radio button and dropdown menu]

2. Click the All Users dropdown menu. From the visible list, select the user you wish to focus on. Click the Search button to display information for a single user and the role(s) for all organizations with which he/she is affiliated.

![Screenshot of the search result for a user with roles as Grants Officer for NMFS and NOS, and multiple CFDAs and Thresholds]

3. The result of clicking the Search button when the search has been narrowed to one user is visible in the image below. In this example, the user has roles as a Grants Officer for NMFS and NOS. This person also has multiple CFDAs and multiple Thresholds.

Remember, the CFDA may (or may not) be visible when a person has the role of Grants Specialist, Grants Officer or Director. The Threshold may (or may not) be visible when a person has the role of Grants Officer or Budget Officer. For all remaining roles both the CFDA and the Threshold are blank.
4. To narrow the search to a single organization (when the user has been selected), click the ---- All Organizations ---- ▼ dropdown menu and select an organization. Click the Search button to display the user’s role(s) for that organization.

5. The image below is visible when the search is limited to one user and subsequently to one organization. The same data was returned when the search was done by organization and then by user (e.g., NWS, Auser10 (last name), TestGMD (first name)). Also note, the update that was made in an earlier search in the previous section (where we searched by organization and subsequently by user within that organization) is visible on the screen.

6. Return to step #5 in the previous section. The information presented there is the same as for this section. The only difference is that in the previous section the initial search is by organization; in this section the initial search is by user.
Update Status for User Role(s)

For each row on the screen, click the AAA Notified dropdown menu. In the image below there is a red box surrounding the four options that are available for each user role. With the dropdown menu fully expanded, select one option for each user role. The option selected should represent the AAA’s best knowledge of an accurate status for a user’s role(s).

NOTE: Following Grants Online convention, the options on the dropdown menu are listed in alphabetical order.

- AAA Disclaimed -- I am not the AAA for the user and/or am unable to determine if the user should have the role indicated.
- AAA Notified – The AAA has been notified of the start of the Reauthorization window of opportunity for the current fiscal year. This is the default.
- AAA Reauthorized – The role assigned to the user should remain as it is.
- AAA Removed – The role assigned to the user should be removed (i.e., the user no longer needs access to Grants Online with the role indicated).
Help Desk Assistance (Reauthorization Concerns)

When requesting Help Desk assistance with Reauthorization-related matters, please provide the following information:

- Use **Reauthorization** in the Subject line of the grantsonline.helpdesk@noaa.gov email
- Name of the organization
- If the user is affiliated with more than one active Grants Online organization, please provide the organization ID (orgID)
- Grants Online user name on the account in question (e.g., jsmith)
- Which user roles are included in this request?
- Description of request or issue of concern