Recipient Administrator Guidance Document

NOAA Grants Online Program Management Office

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You have been identified as a Recipient Administrator for your organization. This document provides information that will facilitate your ability to perform the tasks associated with your role. The Grants Online Help Desk **<u>does not</u>** assume responsibility for creating and managing (including setting up passwords) for Recipient Accounts. Those actions should be performed by the Recipient Administrator.

Create an account for a new user

1. Log in to Grants Online https://grantsonline.rdc.noaa.gov/ using your Recipient Administrator account.
2. Click the ***Awards*** Tab.
3. Click the **Manage Recipient Users** link.
4. Click the **Add another user** link (typically at the bottom of the screen).
5. Complete all information on the ***Create Recipient User*** launch page:
   a. All fields with a red asterisk are mandatory.
   b. ***See the chart below for an explanation of user roles.***
   c. Carefully select the User Role for the account being created; the default role is Recipient User (Key Personnel).
6. Click the **Save** button to retain the information entered and generate a unique user name.
7. Click the **Done** button.

Grant Recipient User Roles – Definitions	
User Role	**Responsibilities**
Recipient Authorized Representative (also referred to as the Authorized Representative)	Has signatory authority for official grant documents (e.g., SF- 424). A person with this role may countersign Award documents (i.e., New Award, CD-450, or amendment (CD-451)). More than one person may have this role at an organization. For each award, only one person is designated as the primary Authorized Representative.
Recipient Administrator	Has permission to set-up other people in his/her organization as Grants Online users. The Recipient Administrator can also give a user access, as appropriate, to specific awards.
Business / Financial Representative (BIZ/FIN)	Can initiate Award Action Requests and prepare Federal Financial Reports (FFRs). The person with this role ***<u>cannot</u>*** submit the FFR directly to the Federal agency; s/he must send it to his/her organization's Authorized Representative.

Business / Financial Representative – Submitting (BIZ/FIN)	Has the same role as the Business / Financial Representative. However, a person with this role ***may*** submit the FFR directly to the Federal agency without routing it through an Authorized Representative.
Principal Investigator / Project Director (PI/PD)	Can initiate Award Action Requests and complete Performance Progress Reports (PPRs). A person with this role ***cannot*** submit the PPR directly to the Federal agency; s/he must send it to his/her organization's Authorized Representative.
Principal Investigator / Project Director – Submitting (PI/PD)	Has the same role as the Principal Investigator / Project Director. However, a person with this role ***may*** submit the PPR directly to the Federal agency without routing it through an Authorized Representative.
Key Personnel (Recipient User)	Can view assigned awards for his/her organization and initiate Award Action Requests. However, a person with this role must submit documents to his/her organization's Authorized Representative. The Authorized Representative will review and submit documents to the agency.
More than one user can have the same role. **A single user can have more than one role.**	

Update an existing user's password

1. Log in to Grants Online https://grantsonline.rdc.noaa.gov/ using your Recipient Administrator account.
2. Click the ***Awards*** Tab.
3. Click the **Manage Recipient Users** link.
4. If you are the Recipient Administrator for more than one organization, you must select the appropriate organization from the dropdown menu. Upon selecting an organization, the names of all registered users are visible. Advance to step 6.
5. If you are the Recipient Administrator for one organization, omit step 4; all users in your organization should be visible.
6. Locate the user, within that organization, on whose account you would like to work.
7. In the Action column, click the **Edit Profile** link.
8. To reset the password, click the **Reset Password** button.
   a. Resetting password for: **{Username}.**
   b. Are you sure?
   c. Click the **Reset** button.

   d. Ask the user to write the temporary password on a piece of paper.
   e. Emphasize that the password is **case sensitive**.
   f. Click the **Done** button.
9. Ask the user to log on to his/her account using the temporary password.
10. When the temporary password is correctly typed, the user is logged on to Grants Online and presented with a data entry screen.
11. Instruct the user to again type the temporary password (***old password***).
12. Ask the user to write the ***new password*** on a piece of paper, ensuring the ***new password*** meets all requirements. Emphasize that the password is **case sensitive.**
    a. A minimum of 12 non-blank characters; the first character must be alphabetic; there must be one upper case character; one lower case character; one number (0-9); one special character – hash tag or pound symbol (#), underscore (_) or dollar sign ($).
    b. Six of the characters may only occur once in the password.
    c. Prior passwords cannot be re-used (i.e., at least three characters must be different than a previously-used password).
    d. The ***new password*** can't contain a part of the user's name or account name.
13. The user types a ***new password*** and types the ***new password*** again as a confirmation.
14. Upon successfully typing and confirming a ***new password***, the user is returned to the Grants Online login screen.
15. The user should be able to login to Grants Online using the newly-created password.

Unlock a user's account

1. Log in to Grants Online https://grantsonline.rdc.noaa.gov/ using your Recipient Administrator account.
2. Follow steps 2 - 7 under the Update an existing user's password section.
3. To unlock an account, click the **Unlock Account** button.
4. The message ***"User account successfully unlocked."*** indicates completion of the requested task.
5. Instruct the user to login using what they believe to be the last used password. If the first two attempts are not successful (and you are certain they have the correct username), follow the steps to reset the user's password.

Specify or update a user role

1. Log in to Grants Online https://grantsonline.rdc.noaa.gov/ using your Recipient Administrator account.
2. Click the ***Awards*** Tab.
3. Click the **Manage Recipient Users** link.

4. If you are the Recipient Administrator for more than one organization, you must select the appropriate organization from the dropdown menu. Upon selecting an organization, the names of all registered users are visible. Advance to step 6.
5. If you are the Recipient Administrator for one organization, you should omit step 4; all users in your organization should be visible.
6. Locate the user, within that organization, whose account you would like to manage.
7. In the Action column, click the **Manage Award Access** link.
8. You may need to again select the appropriate organization (if you are the Recipient Administrator for more than one organization). From the dropdown menu, choose the organization.
9. Click the **Select** button.
10. Use the radio buttons and the check boxes on the **Manage Recipient – {Username}** screen to specify the roles and therefore the actions the user will be permitted to perform.
11. Click the **Assign** button.
12. The message, ***"The Save was successful, this User's Roles and Award Assignments have been modified accordingly."*** indicates completion of the requested task.
13. Click the **Cancel** button to return to the previous screen.

Disassociate a user account

1. Complete steps 1 – 9 under the previous section **Specify or update a user role**.
2. While on the **Manage Recipient – {Username}** screen, on a separate piece of paper (or by printing the current screen), note the user's current role(s).
3. Though it may seem like a logical next step **DO NOT click** the **Disassociate User** button.
4. Just below the **Disassociate User** button there are two important Notes:
    a. This will remove **all** roles and access to awards that this user holds in this Organization.
    b. You may need to submit and get approval on a Change in Key Personnel Award Action Request before you take this action. (Refer to the Award Action Request Guidance document).
5. Click the **Inbox** tab**.**
6. Click the **Task Management** link.
7. On the resulting screen, you will have the opportunity to enter the following information:
    a. Search Criteria (specify the applicable role e.g., Recipient Authorized Representative)
    b. Last Name of User
8. Click the **Search** button.
9. If there are any tasks associated with the user account, those tasks must be reassigned to another user within the organization. Tasks should only be reassigned to a user who has the same role (and therefore level of access) as the user to whom the tasks are currently assigned. If there no tasks need to be reassigned, advance to XXX.

a. To reassign a task, click the **Reassign** button.
b. On the resulting screen, specify the last name of the user to whom the task should be reassigned. If the user has a common last name, enter the first name or other information to narrow the search. To keep the search as efficient as possible, specify fewer rather than more data elements.
c. Click the **Search** button.
    - If the person is not an existing Grants Online user the ***"Nothing found to display."*** message may be visible when the **Search** button is clicked.
    - If so, use the **Add a new user >>** link.
    - Refer to the steps in the Create an account for a new user section.
d. From the list of user names that are displayed, click the **Select** link next to the appropriate user's name.
e. As a fail-safe measure the system asks "Are you are sure you want to reassign the following task to {**new user with the same role**}?
f. Click the **Yes** or **No** button.
g. Repeat step 10 – 16 as many times as is necessary to reassign all tasks.
h. When you have removed all tasks, repeat steps 1-9 under the Specify or update a user role section.

10. When on the **Manage Recipient – {Username}** screen uncheck any checkboxes that are checked at the top of the screen. In addition, make certain all radio buttons are in an "inactive" state (e.g., the radio buttons for Not a Business/Financial Representative and Not a PI/PD are selected).
11. Click the **Assign** button.
12. At the top of the screen, just under the **Manage Recipient – {Username}** header, there is a message indicating that the ***"The save was successful, this User's Roles and Award Assignments have been modified accordingly."***
13. Click the **Disassociate User** button.
14. The system returns to the Manage Recipients screen.
15. Look at the data in the Disassociated Date column for that user; the current date should be visible.