
Manage System Accounts

Version 1.16.01.0

External User's Mini User Guide

New Features

Overview

The Account Management System (AMS) is available to register certificates for use of the eRA web services. This process adds roles to specific institutions that require access to these web services. A system account can be created or updated to gain access to the referenced web services.

The following system account functions can be performed via AMS:

- Search Account
- View Account
- Edit Account (Edit Account Information, Delete Role(s), Add Role(s))
- Create Account
- Validate Certificate

User Roles

- SIGNING OFFICIAL (SO)
 - This role gives users the ability to search/create/edit system accounts within their institutions.

Accessing Accounts to Manage System Accounts

1. To create a system account, log into Commons at <http://commons.era.nih.gov/commons>.
2. Click on the **Admin** tab → the **Accounts** tab → the **Manage Accounts** tab.

For more information on logging into Commons, please refer to the [Commons](#) online help.

Successful Login and Access

When the **Manage Accounts** tab is clicked, the system displays the *Search Accounts* screen in a separate browser window.

1. From the drop-down menu for **User Types**, select *System* to view the *Search Accounts* screen for searching for the system user type.

The screenshot displays the 'Search Accounts' interface. At the top, there are 'Notes & Tips' and a 'Search Accounts' header with a help icon. Below this is the 'Search Criteria' section, which includes a 'Roles' dropdown menu with a list of roles: APPLICANT_RETRIEVAL_DATA_SERV, IEDISON_FILE_TRANSFER_SERV, SERVICE_PROVIDER_ROLE, and SVS_APPLICANT_DATA_SERV. There are input fields for 'First Name', 'Middle Name', 'Last Name', and 'Email'. Below these are fields for 'Certificate Owner' and 'Certificate Serial Number'. The 'User Types' dropdown menu is set to 'System' and is circled in red. To its right is a 'Search outside your Institution' checkbox. At the bottom right of the search criteria section are 'Search' and 'Clear' buttons, both also circled in red. Below the search criteria is the 'Search Results' section, which currently displays 'Nothing found to display.' and a 'Create Account' button. The footer contains links for 'Contact Us', 'Privacy Act Statement', 'Accessibility', and 'Disclaimer', along with logos for NIH, Department of Health and Human Services, and GRANTS.GOV™.

Figure 1: Search Accounts Screen Displaying the System Roles

NOTE: The **Create Account** button only appears after a search is executed.

Search Account

1. To search for an account, enter the appropriate search criteria.

Last Name requires a minimum of two characters. Upper or lower case may be used. A wild card character (%) may be used to search for string patterns on any field.

Below is a description of the role and examples of access provided:

Role	Description	Examples of Access Provided for This Service
APPLICANT_RETRIEVAL_DATA_SERV	Provides access to the Submission Agency Data Service (SADS) to retrieve person, organization, Funding Opportunity Announcement, application and grant data supporting electronic submission.	Application status information. Person or Organization information (provided the user has access to that organization data). Previous Submission or Prior Grant information Information regarding a particular Funding Opportunity (FOA)
IEDISON_FILE_TRANSFER_SERV	The role is used when creating system accounts to register certificates. This role on a certificate is also needed to access iEdison web service.	Used to upload invention, patent, and utilization reports data into iEdison by using web service.
SERVICE_PROVIDER_ROLE	Provides access to the Submission Image Service (SIL) to generate the assembled application image for a single or multi-project application.	Generates Grant Image for Single and Complex Grant Applications as it would be viewed by NIH staff and reviewers.
SVS_APPLICANT_DATA_SERV	Provides access to the Submission Validation Service (SVS) to validate an application or a component of a multi-project application against agency business rules.	Validates the application against agency business rules. Currently applies to Multi project applications and R03 and R21 applications

*For more information on the services provide by these roles, please refer to the [NIH System to System \(S2S\) “Client” Transaction Guide](#).

2. Click the **Search** button to execute the search or click the **Clear** button to clear the search criteria.

When the **Search** button is clicked, the system displays the *Search Accounts* screen with the *Search Results* in a hit list.

NOTE: Users with the SO role can view/edit all system accounts for their respective Institutions.

Notes & Tips:

- A minimum of two characters is needed to execute a search on 'Last Name'.
- A wild card search may be executed on any field using the percent character (%).

Search Accounts ?

Search Criteria

Roles

APPLICANT_RETRIEVAL_DATA_SERV
 IEDISON_FILE_TRANSFER_SERV
 SERVICE_PROVIDER_ROLE
 SVS_APPLICANT_DATA_SERV

First Name Middle Name Last Name Email

Certificate Owner Certificate Serial Number User Types

Search Results

1 One item found.

Contact Person Name	Roles/Affiliation	Certificate Owner	Action
Eveready, Tom	APPLICANT_RETRIEVAL_DATA_SERV -UNIVERSITY OF CALIFORNIA SAN DIEGO IEDISON_FILE_TRANSFER_SERV -UNIVERSITY OF CALIFORNIA SAN DIEGO	University of California	View Edit

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Figure 2: Search Accounts Screen Displaying Search Results per SO's Institution

The search results can be sorted by clicking the **Contact Person Name** hyperlink or the **Certificate Owner** hyperlink. The default sort is ascending. By clicking the appropriate hyperlink a second time, the system sorts the search results in descending order. The two sorts are mutually exclusive of each other.

Create Account

1. To create a system account, click the **Create Account** button at the bottom left corner of the *Search Accounts* screen.

NOTE: The **Create Account** button only appears after a search is executed.

When the **Create Account** button is clicked, the system displays the *Create Account* screen with no entry on the user type field.

2. Select *System* for **User Type** on the *Create Account* screen.

When *System* is selected for **User Type**, the *Create Account* screen displays the appropriate fields that need to be completed for a system account.

The screenshot shows the 'Create Account' web form. The 'User Type' dropdown is set to 'System'. The 'Organization' field is empty. The 'Certificate Owner' field is empty. The 'Certificate Provider/Authority' dropdown is empty. The 'Certificate Serial Number' field is empty. The 'Contact Information' section includes fields for 'First Name', 'Middle Name', 'Last Name', 'E-mail', and 'Confirm e-mail'. A checkbox is checked with the text 'I am aware of and understand my responsibilities in providing the information pertaining to this system account.' The 'Roles' section is empty. The form has 'Save', 'Clear', and 'Cancel' buttons at the bottom left. The footer contains links for 'Contact Us', 'Privacy Act Statement', 'Accessibility', and 'Disclaimer', along with logos for NIH, Department of Health and Human Services, and GRANTS.GOV.

Figure 3: Create Account Screen with System User Type Selected

NOTE: For users with the SO role, the institution's name is pre-populated with their respective Institution.

3. Type in the owner in the **Certificate Owner** field. The **Certificate Owner** is the organization who acquired the certificate.
4. Select the appropriate **Certificate Provider/Authority** from the drop-down menu.

For information on obtaining/registering a certificate from a Certificate Provider/Authority, please refer to one of the following sections in the [Web Services Certificate Guide](#):

- Section 2.4.1 for Internal users
- Section 2.4.2 for iEdison users
- Section 2.4.3 for Commons users

NOTE: Examples of the values that are available for the Certificate Provider/Authority include: *Comodo, Digicert, Entrust, Geo Trust, Go Daddy, InCommon, and Thawte.*

5. Type in the **Certificate Serial Number**.

NOTE: The **Certificate Serial Number** format is XX:XX:XX:XX:XX:XX:XX:XX.

6. Complete the *Contact Information*.

7. Select the **Agreement** check box below the **Confirm e-mail** field.

The **Agreement** checkbox is mandatory for the user to acknowledge information provided for the system account. If the **Agreement** checkbox is not checked and the **Save** button is clicked, the system displays the following error message: *The agreement has not been accepted. Please accept the agreement by checking the checkbox. (ID: 206109).*

8. For the **Role** field in the *Roles* section, click the **magnifying glass** icon.

When the **magnifying glass** icon is clicked, the system displays the *Select Role* screen.

a. Click the **Select** hyperlink on the *Select Role* screen.

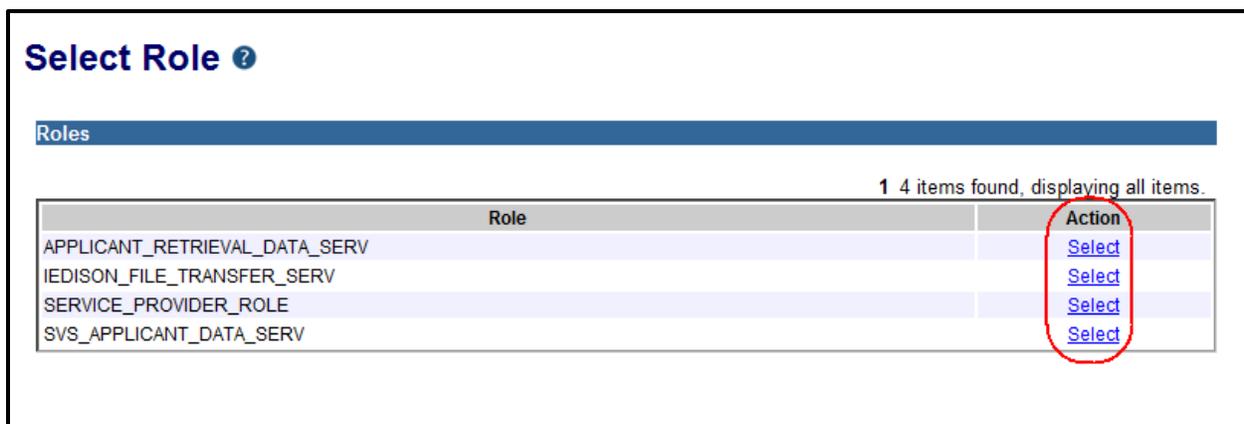


Figure 4: Select Role Screen

When the **Select** hyperlink is clicked, the system returns to the *Create Account* screen.

8. Click the **Add** button to add the selected role with organization/institution to the system account.
9. Perform one of the following options on the *Create Accounts* screen:
 - a. Click the **Save** button to save the changes.

- b. Click the **Clear** button to clear the fields.
- c. Click the **Cancel** button to return to the *Search Account* screen.

The system performs validations when the **Save** button is clicked. Please refer to the [Error/Warning Messages](#) topic for more information. If there are no error messages, then the system displays the *Create Account Confirmation* screen with the following message: *Account was successfully created* and with the following note: **NOTE: eRA would like you to go through a certificate validation procedure to ensure your certificate works with eRA systems as designed.**

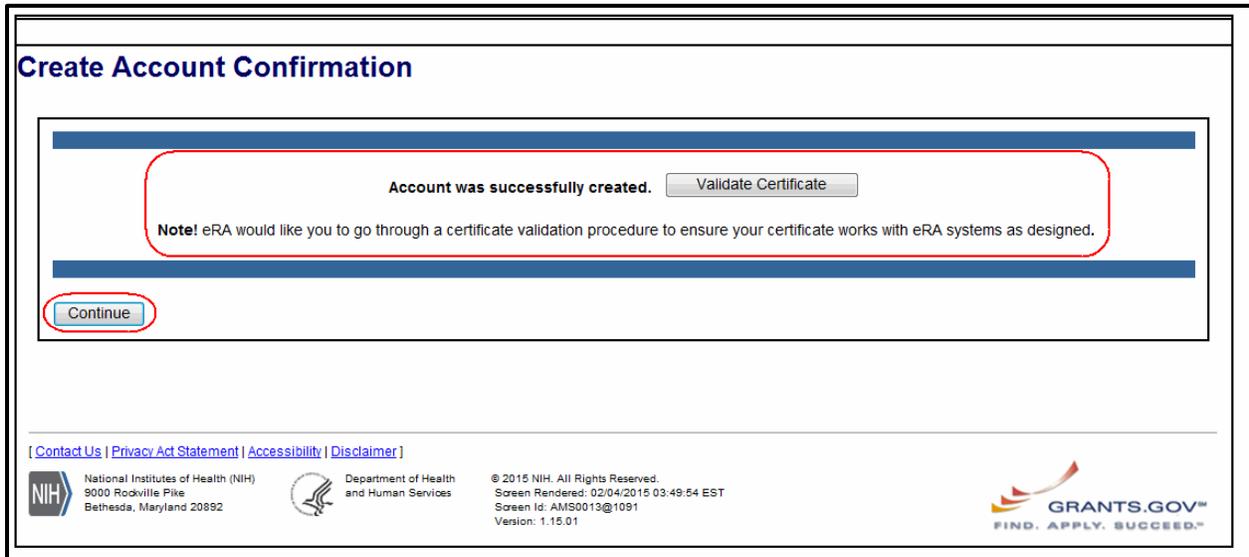


Figure 5: Create Account Confirmation Screen Displaying the Validate Certificate Button

9. Click the **Validate Certificate** button to validate the certificate.
 - a. For more information please refer to the [Validate Certificate](#) topic.
10. Click the **Continue** button to return to the *Search Accounts* screen.

When the **Continue** button is clicked on the *Create Account Confirmation* screen, the system displays the *Search Accounts* screen with the new account created being displayed and sends an email notification to the contact person of the system account. Please refer to the [Email Notifications](#) topic for more information.

Notes & Tips:

- A minimum of two characters is needed to execute a search on 'Last Name'.
- A wild card search may be executed on any field using the percent character (%).

Search Accounts ?

Search Criteria

Roles

First Name
 Middle Name
 Last Name
 Email

Certificate Owner
 Certificate Serial Number
 User Types

Search Results

1 2 items found, displaying all items.

Contact Person Name	Roles/Affiliation	Certificate Owner	Action
Eveready, Tom	APPLICANT_RETRIEVAL_DATA_SERV -UNIVERSITY OF CALIFORNIA SAN DIEGO IEDISON_FILE_TRANSFER_SERV -UNIVERSITY OF CALIFORNIA SAN DIEGO	University of California	View Edit
Energizer, Bunny	APPLICANT_RETRIEVAL_DATA_SERV -UNIVERSITY OF CALIFORNIA SAN DIEGO	University of California	View Edit

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Figure 6: Search Accounts Screen Displaying Newly Created Account

View Account

1 2 items found, displaying all items.

Contact Person Name	Roles/Affiliation	Certificate Owner	Action
Eveready, Tom	APPLICANT_RETRIEVAL_DATA_SERV -UNIVERSITY OF CALIFORNIA SAN DIEGO IEDISON_FILE_TRANSFER_SERV -UNIVERSITY OF CALIFORNIA SAN DIEGO	University of California	View Edit
Energizer, Bunny	APPLICANT_RETRIEVAL_DATA_SERV -UNIVERSITY OF CALIFORNIA SAN DIEGO	University of California	View Edit

Figure 7: Search Accounts Screen Search Results Displaying the View Hyperlink

1. To view an account, click the appropriate account's **View** hyperlink in the *Search Results* section on the *Search Accounts* screen.

When the **View** hyperlink is clicked, the system displays *View Account* screen.

2. Click the **Cancel** button to exit the screen.

View Account

Personal Information

* User Type: System

* Organization: UNIVERSITY OF CALIFORNIA SAN DIEGO

* Certificate Owner: University of California

* Certificate Provider/Authority: Go Daddy Certificate Authority

* Certificate Serial Number: TW:01:02:03:04

Contact Information (List the person who can be contacted for the system account)

* First Name: Tom

Middle Name:

* Last Name: Eveready

* E-mail: oliverl@mail.nih.gov

Roles

Role	Organization	Action
APPLICANT_RETRIEVAL_DATA_SERV	UNIVERSITY OF CALIFORNIA SAN DIEGO	
IEDISON_FILE_TRANSFER_SERV	UNIVERSITY OF CALIFORNIA SAN DIEGO	

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Figure 8: View Account Screen

Modify Account

1 2 items found, displaying all items.

Contact Person Name	Roles/Affiliation	Certificate Owner	Action
Eveready, Tom	APPLICANT_RETRIEVAL_DATA_SERV -UNIVERSITY OF CALIFORNIA SAN DIEGO IEDISON_FILE_TRANSFER_SERV -UNIVERSITY OF CALIFORNIA SAN DIEGO	University of California	View Edit
Energizer, Bunny	APPLICANT_RETRIEVAL_DATA_SERV -UNIVERSITY OF CALIFORNIA SAN DIEGO	University of California	View Edit

Figure 9: Search Accounts Screen Search Results Displaying the Edit Hyperlink

1. To edit an account, perform a search on the *Search Accounts* screen.
2. Click the **Edit** hyperlink for the appropriate account to be edited.

When the **Edit** hyperlink is clicked, the system displays the *Modify Account* screen.

Modify Account ?

Personal Information

* User Type:

* Organization:

* Certificate Owner:

* Certificate Provider/Authority:

* Certificate Serial Number:

Note! eRA would like you to go through a certificate validation procedure to ensure your certificate works with eRA systems as designed.

Contact Information (List the person who can be contacted for the system account)

* First Name:

Middle Name:

* Last Name:

* E-mail:

* Confirm e-mail:

Roles

Role	Organization	Action
APPLICANT_RETRIEVAL_DATA_SERV	UNIVERSITY OF CALIFORNIA SAN DIEGO	Delete
IEDISON_FILE_TRANSFER_SERV	UNIVERSITY OF CALIFORNIA SAN DIEGO	Delete
<input type="text"/>	<input type="text"/>	Add

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Figure 10: Modify Account Screen

- If desired, make the appropriate edits in the *Personal Information* and/or *Contact Information* section.

NOTE: The **User Type** and **Organization** fields are not editable.

- For information on obtaining/registering a certificate from a Certificate Provider/Authority, please refer to one of the following sections in the [Web Services Certificate Guide](#):
 - Section 2.4.1 for Internal users
 - Section 2.4.2 for iEdison users
 - Section 2.4.3 for Commons users
- To validate the certificate, click the **Validate Certificate** button.
 - For more information please refer to the [Validate Certificate](#) topic.
- To delete a role, click the **Delete** hyperlink for the appropriate role.

When the **Delete** hyperlink is clicked, the system deletes that role from the list of roles assigned to that system account.

NOTE: A system account should have at least one role. If all roles are deleted from a system account, the system account becomes deactivated. Only active system accounts appear on the *Search Accounts* screen.

7. Perform one of the following options:
 - e. When all edits are complete, click the **Save** button.
 - f. Click the **Clear** button to clear out the edits and restore the previous data.
 - g. Click the **Cancel** button to cancel the edits and return to the *Search Accounts* screen.

When the **Save** button is clicked, the **Validate Certificate** button is grayed out and the system performs validations. Please refer to the [Error/Warning Messages](#) topic for more information. If there are no error messages, the changes are saved, the **Validate Certificate** button is enabled, and the following message is displayed: *The account has been successfully updated (ID: 200533).*

Modify Account ?

Information Message

i The account has been successfully updated (ID: 200533)

Personal Information

* User Type:

* Organization:

* Certificate Owner:

* Certificate Provider/Authority:

* Certificate Serial Number:

Note! eRA would like you to go through a certificate validation procedure to ensure your certificate works with eRA systems as designed.

Contact Information (List the person who can be contacted for the system account)

* First Name:

Middle Name:

* Last Name:

* E-mail:

* Confirm e-mail:

Roles

Role	Organization	Action
APPLICANT_RETRIEVAL_DATA_SERV	UNIVERSITY OF CALIFORNIA SAN DIEGO	Delete
IEDISON_FILE_TRANSFER_SERV	UNIVERSITY OF CALIFORNIA SAN DIEGO	Delete
<input type="text"/>	<input type="text"/>	Add

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Figure 11: Modify Account Screen Displaying Saved Account Message

8. After the updates have been saved, click the **Cancel** button to close the *Modify Account* screen and return to the *Search Accounts* screen.

Validate Certificate

When the **Validate Certificate** button is clicked on either the *Modify Account* or *Create Account Confirmation* screen, the system displays the *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. To validate the certificate, click the **Validate** button.

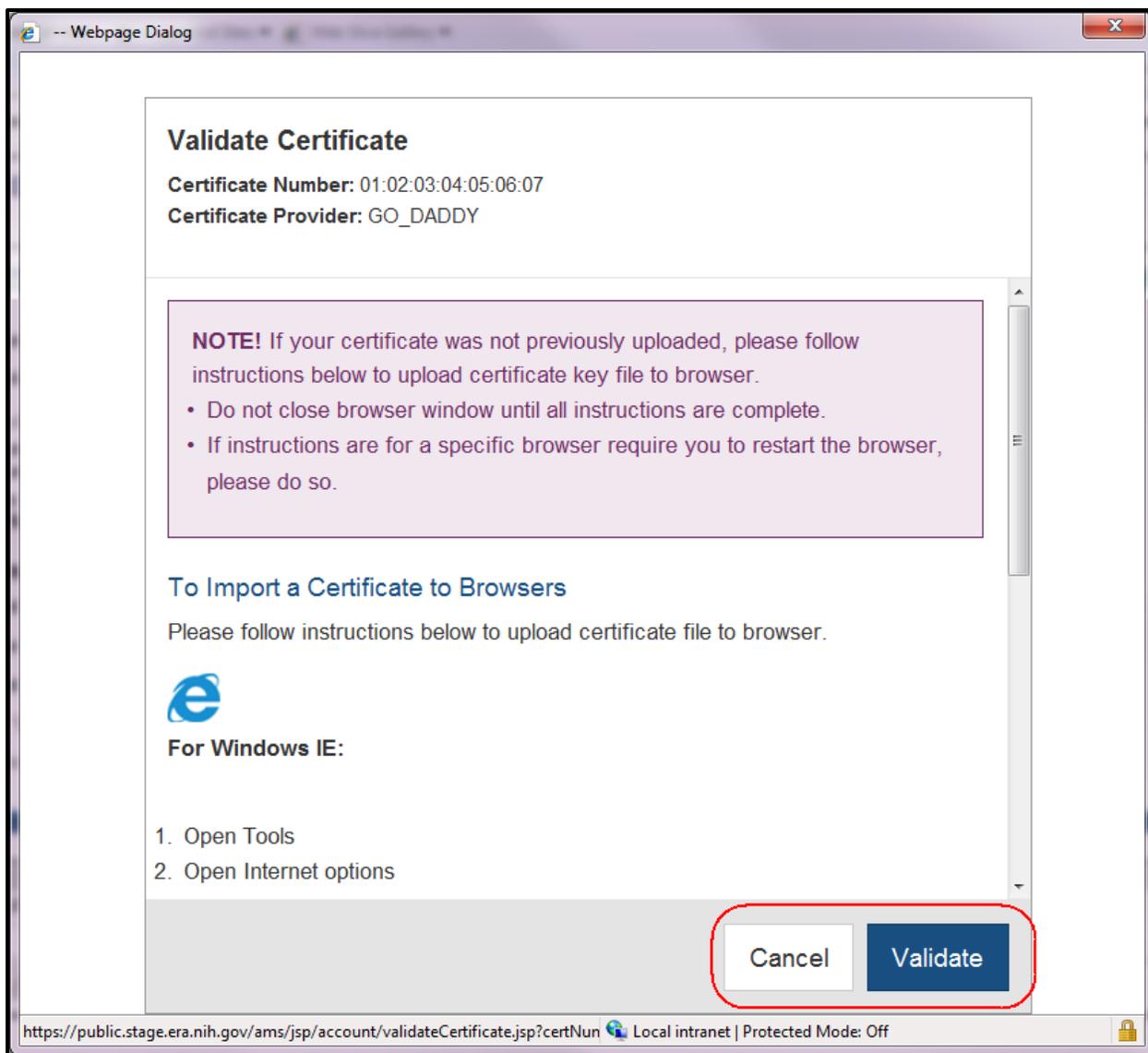


Figure 12: Validate Certificate Screen Displaying Browser Instructions

When the **Validate** button is clicked, the system performs the certificate validation. For more information please refer to the [Error/Warning Messages](#) topic.

If there are no validation errors, the system displays on the *Validate Certificate* screen the following success message: *Success! Your certification works with the eRA systems as expected.*

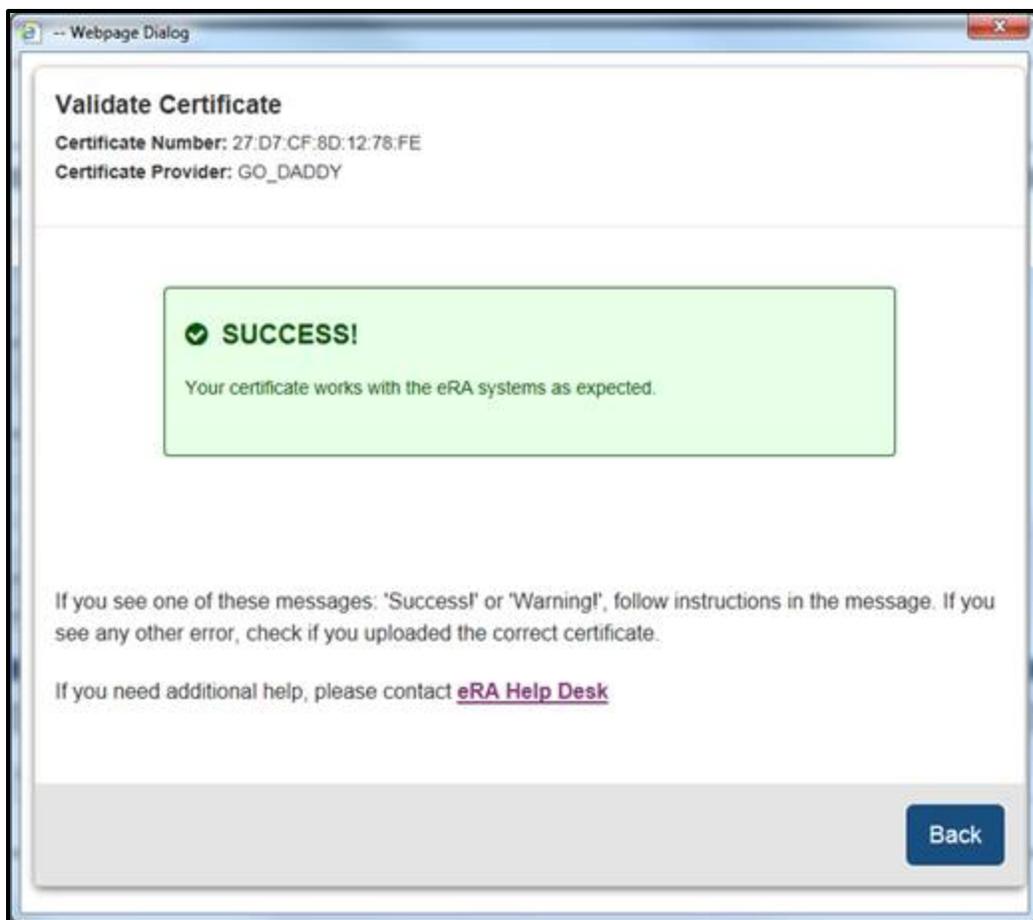


Figure 13: Validate Certificate Screen Displaying Successful Validation Message

The following audit information is stored in the database.

- Certificate Number – Certificate Number that was entered during validation
- Certificate Owner – 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 mapping does not exist
 - Validation is successful but the certificate does not match the user entered details

Email Notifications

NOTE: Currently email notifications are only being sent when a new system account is created.

Create New Account

*** This is an automated notification - Please do not reply to this message. ***

First Name Last Name,

An eRA system account has been created and registered with the provided certificate serial number on MON DD, YYYY by <user's name>. The system account details are:

- Certificate Owner: <name>

- Role(s) that are assigned to this account: <Role Name>;

For additional information, please refer to the details at <Website URL>. If you have any questions about the creation of this account or level of access, contact your administrator at: <Administrator's email address>.

Error Messages

Search Errors

If the system determines that the query result exceeds the 500 record limits, then the system displays the following error message:

The query has returned more records than the limit allowed by maximum query result size. Please redefine your query parameters. (ID: 22102)

If the system determines that at least two characters were not entered in the **Last Name** field, then the system displays the following error message:

You must search on at least two characters of the Last Name (ID: 200528)

Create/Edit Account Errors

If the system determines that the **Certificate Serial Number** is invalid, then the system displays the following error message:

The Certificate Serial Number format is invalid. It should be provided in the "xx:xx:xx:xx:xx:xx:xx" format where the number of xx can be varied depending on the certificate provider.

If the system determines that the certificate has been associated with an existing account, then the system displays the following error message:

The provided Certificate Serial Number has been mapped to an existing account. Please provide another Certificate Serial Number to create this system account.

Validate Certificate Errors

If the browser call did not go through to the certificate provider, the appropriate browser error is displayed.

If the browser call does go through to the certificate provider, but the mapping does not exist then the following error message is displayed:

Validation is successful but certificate mapping does not exist for the user.

If the browser call does go through to the certificate provider, but the mapping is incorrect then the following error message is displayed:

Validation is successful but the certificate mapping does not match the user entered details.

Validate Certificate Warning

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 is displayed:

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.