Electronic Research Administration
A program of the National Institutes of Health

National Institutes of Health
Office of Extramural Research

Account Management System (AMS) User Guide for Commons

Apr 12, 2018

CONTACT US

Document Comments:

We value your feedback on this document.

How are we doing? The Communications & Documentation Team of the electronic Research Administration (eRA) is dedicated to serving our community and welcomes your feedback to assist us in improving our user guides. Please send comments about the user guide to this address: eRACommunications@mail.nih.gov.

Troubleshooting support:

Please contact the eRA Help Desk:

Toll-free: 1-866-504-9552

Phone: 301-402-7469

TTY: 301-451-5939

Web:http://grants.nih.gov/support (Preferred method of contact for **external** users)

Web:https://inside.era.nih.gov/eRA_helpdesk.cfm (Preferred method of contact for **internal** users)

Email:commons@od.nih.gov (for Commons Support)

Email:helpdesk@od.nih.gov (for IMPAC II Support)

Hours: Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

DISCLAIMER STATEMENT

No data shown in illustrations represents any real account, project, or individual. Any resemblance to actual accounts, projects, or individuals is purely coincidental.

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Latest Updates

Updates and new features in AMS:

Apr 12, 2018

- eRA Service Desk agents and Grant Solutions account administrators who have the UADM_USER_ROLE and the FOAM_GS_ADMIN or FOAM_GS_AGENCY_ADMIN role can create and manage accounts for GrantSolutions users. See Create GrantSolutions user accounts.

Oct 26, 2017

- The account unlock operation now requires the user to login that day: When an administrator unlocks an account that's been locked due to inactivity, an email notification is sent that asks the user to login to the account that same day. If the user does not login before the end of the day, the account is locked again.

May 18, 2017

- The temporary passwords used in system-generated Commons account invitations and password reset emails are only valid for one 24 hours: Users must log in the same day they receive the notification email, and those who attempt to login with an expired password will be redirected to the password reset/lost password workflow. For more information see Account Invitations from eRA Systems, Initial Login to eRA Account, and Reset Password.

Feb 16, 2017

- The AMS User Guide has been split into separate documents for each user domain (Agency, Commons, iEdison, State Dept). When you login to AMS, the system recognizes your domain and uses it to select the correct online help package.
- It's now possible to search for system accounts by IMPACII user ID.
- Added a more prominent link to the Person Administration module in the Manage Account and Create Account confirmation screens. Click to manage user names and other personal information.

Dec 22, 2016

- When you unlock an account, the user receives a notification saying that he or she has to login to the account on that same day or the account will be relocked. See Reactivate Account
- eRA Service Desk agents can click the **Add Roles to Other org** button to give a system account roles in another organization. See Add/Delete System Roles
- Added instructions for verifying a new Commons account when you receive a *Notification of New Account* from eRA. See Notification of New Account

Nov 17, 2016

- Removes all roles associated with an account when IC Coordinators or Service Desk Agents deactivate the account.
- Allows IC Coordinators to re-certify active accounts to prevent the account holder from getting locked out. Note it will be a requirement for IC coordinators to input a comment and upload an account request form to clarify the re-certification.
- Allows eRA Service Desk Agents to reactivate users and add mapping if no mapping exists.
- Enhances Deactivated Users Report to display correct information, including Deactivated By and Account Deactivation Date.
- Updates the email notifications sent prior to account deactivation to indicate that users should contact their IC Coordinator instead of the eRA Service Desk to request account re-activation.

Sept 15 2016:

- The Create Account screen now lets NIH/Agency administrators search the NED system to find user profiles in their organizations. See Create Agency Accounts for more information.

- Create-Account requests for untrusted Commons accounts can now be approved or rejected automatically. See Create Commons or external iEdison User Accounts for more information.

Aug 18 2016:

- Enhancements to the reporting functionality, including a new internal report on deactivated user accounts. See User Reports.
- IC Coordinators can now upload new or revised account request forms from the Manage Account screen. See Manage Account Request Forms for instructions.
- IC Coordinators and Service Desk agents can now search for accounts that have been locked due to inactivity and reactivate them. See Search by Status for instructions.
- New requirements for accounts with administrative roles: Once a user has held an administrative role (SO/AO, AA, BO, or TTO Admin/User) at one institution, that account cannot be changed to a strictly scientific role, and cannot be affiliated to a different institution in any administrative **or** scientific role: In these cases, the former administrative user must create a new account to use in his or her new role. See Affiliate Account for more information.

July 22 2016:

- Service Desk Agents can now update User IDs on their accounts.
- In the Search Results screen, the label of the Filter box has been changed to Filter Results.
- Search-by-country functionality is now available for state accounts.

June 23 2016:

- AMS validates users' affiliations for administrative roles (SO/AO, AA or BO user roles) to make sure users have administrative roles at only one institution.

- The IC Coordinator (or the Service Desk) can now view and if necessary replace an account's Account Request Form (ARF).

Overview

The Account Management System (AMS) facilitates user and system account administration based on assigned user roles. The system provides the ability to search existing accounts. When a search is performed, all records that meet the search criteria are returned on the *Search Accounts* screen.

Commons Management Staff

Once the institutional account is created, the Signing Official (SO) at each grantee organization is able to establish additional user accounts with various levels of access and capability. The SO or Accounts Administrator (AA) may then create additional accounts for the administrative and scientific staff.

SOs only can also view, create, and maintain system accounts.

User Roles

The following users have the ability to search for, manage and create accounts, and to add or remove roles for user and system accounts:

Commons Management Staff

- Accounts Administrator (AA)
- Administrative Official (AO)
- Business Official (BO)
- Signing Official (SO)

Account Statuses

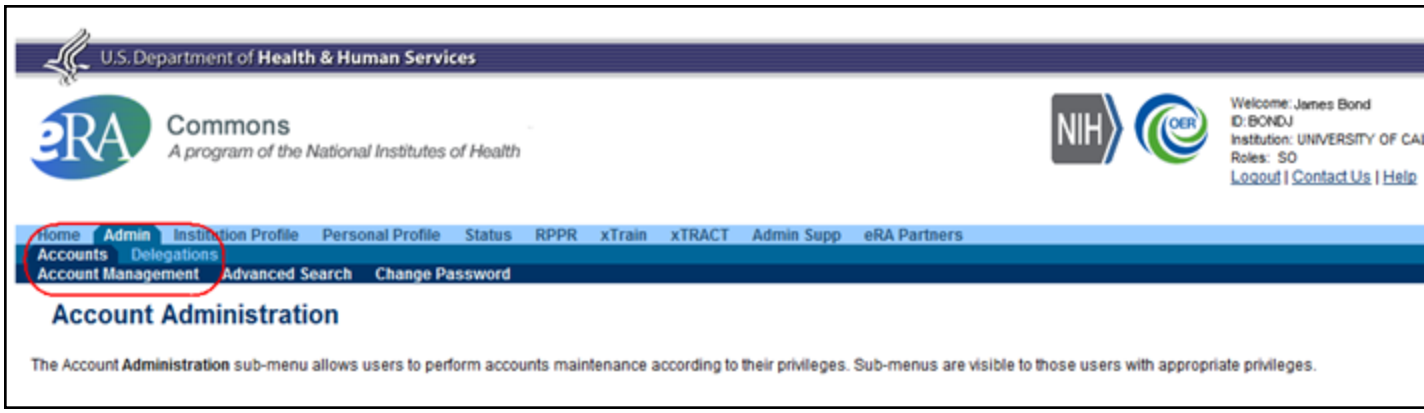
AMS user accounts can have the following statuses:

- Active — A valid account in good standing.
- *Deactivated* — Account has been disabled by an administrator
- *Locked due to inactivity* — Locked by the system due to inactivity (no user activity for 120 days).
- *Pending Affiliation* — Account has not yet been associated to an organization
- *Profile Only* — A profile that is not associated to a user account.

Accessing AMS

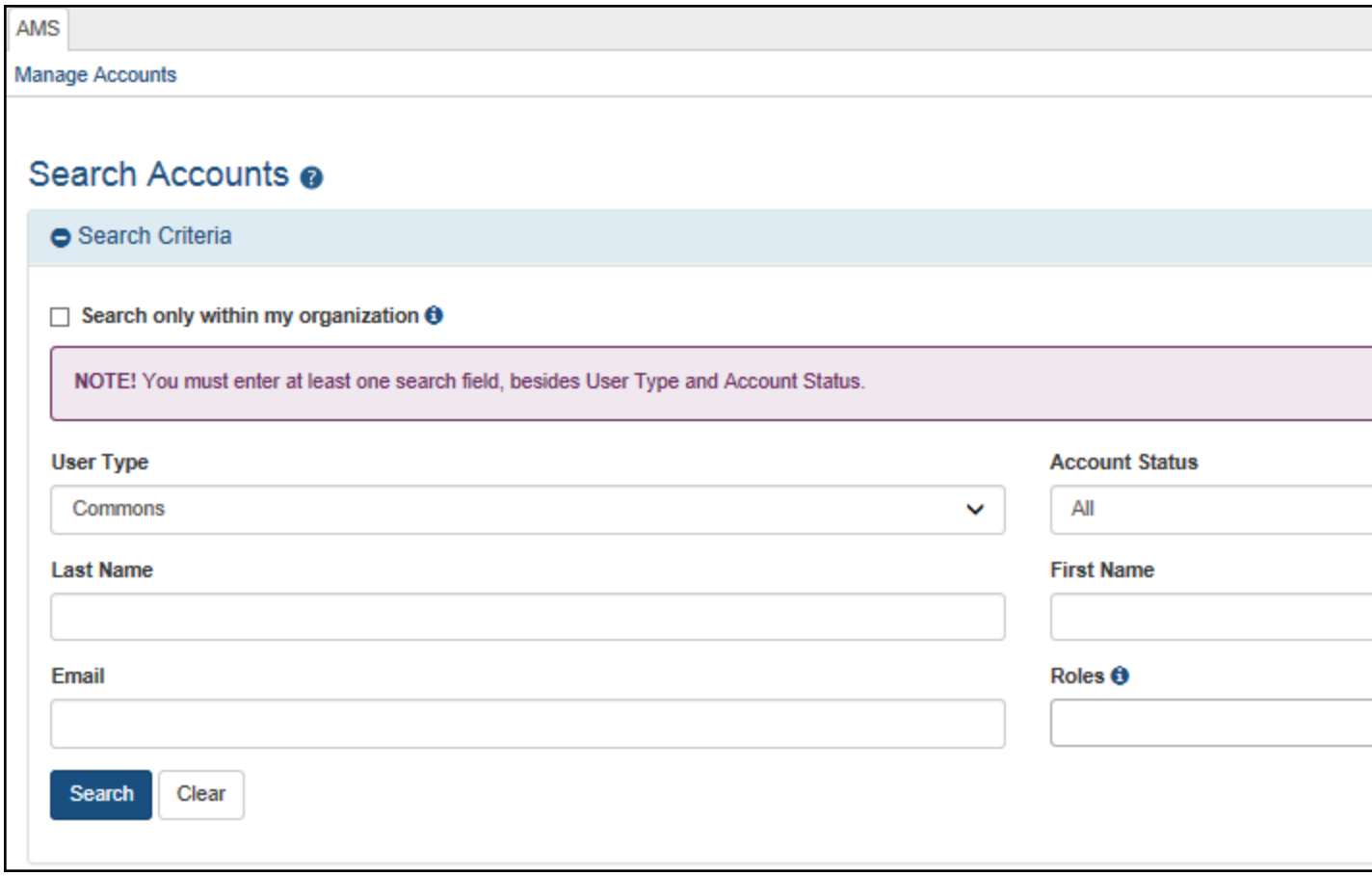
Commons Management Staff

After logging into Commons, access AMS via the **Admin** --> **Accounts** --> **Account Management** sub-menu tab, as shown here.



Commons Menu Tabs

When you click **Account Management**, the AMS *Search Accounts* screen opens, as shown here.



Search Accounts Screen for External Users

For instructions on performing a search, see Search Account.

Logging Out of Account Management System (AMS)

To log out of AMS, click the **Logout** button at the top right corner of the any screen.

Logout Button

Search Accounts

User Accounts

The *Search Accounts* screen provides the ability to search for existing user and system account(s) within or outside of your organization or institution.

See Search for User Accounts

System Accounts

Agency, Commons and external iEdison users can search for system accounts

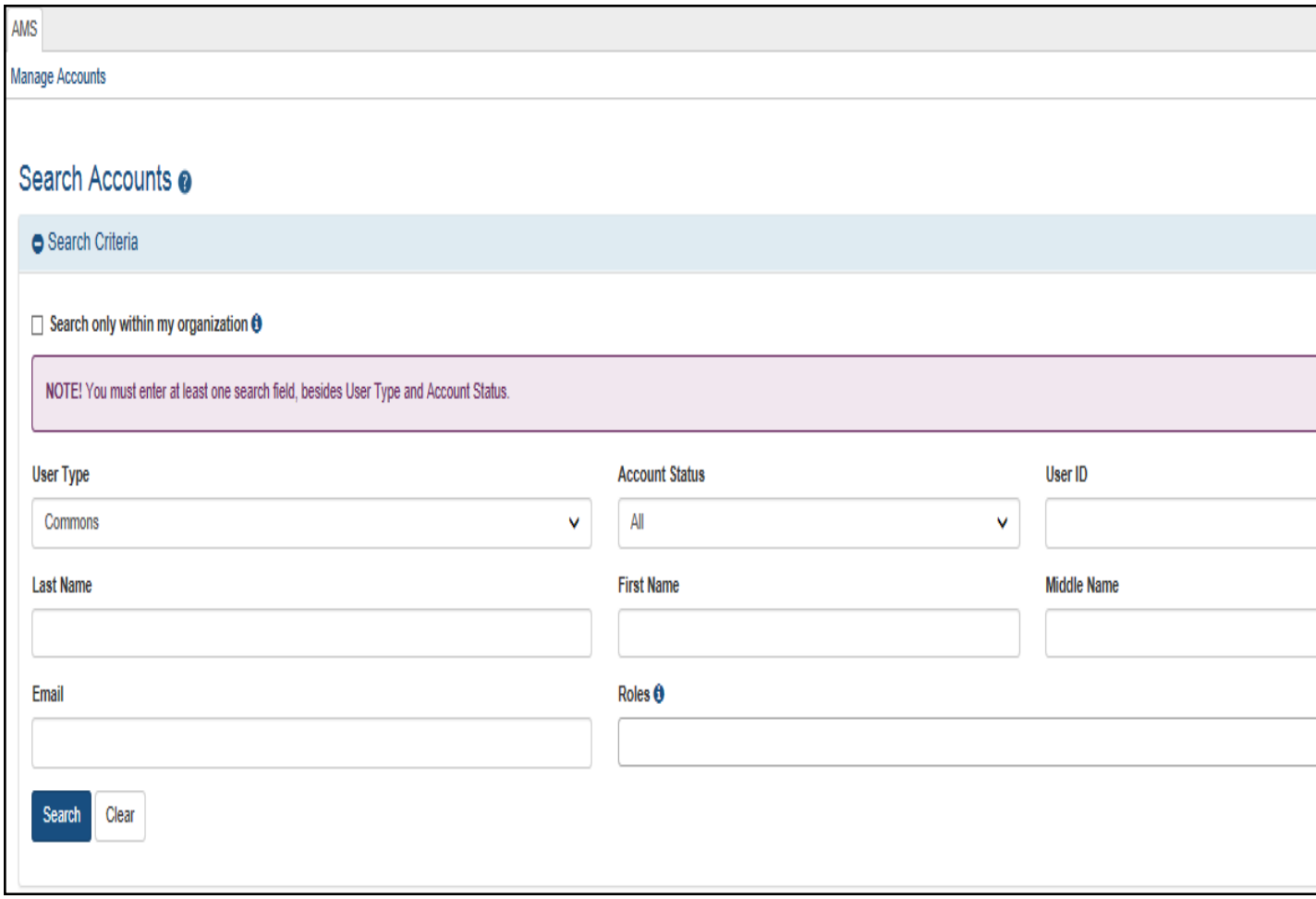
See Search for System Accounts

Certificates

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to the Web Services Certificate (S2S) Guide:Section 2.4.3 for Commons users

Search for Commons User Accounts

The *Search Accounts* screen for external users provides the ability to search for existing user and system account(s).



Search Accounts Screen for External Users

NOTE: You must enter at least one search field, besides the **User Type** and **Account Status**.
Wild card characters such as the percent sign (%) can be used to search for a string of characters.

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1. Enter the appropriate search criteria in at least one of the other search fields.
2. Click the **Search** button to execute the search or click **Clear** to clear the search criteria.
3. The system returns the search results. For more information see Commons User Account Search Results.

   NOTE: Use the **User ID** field to search by IMPACII user ID

Search Options

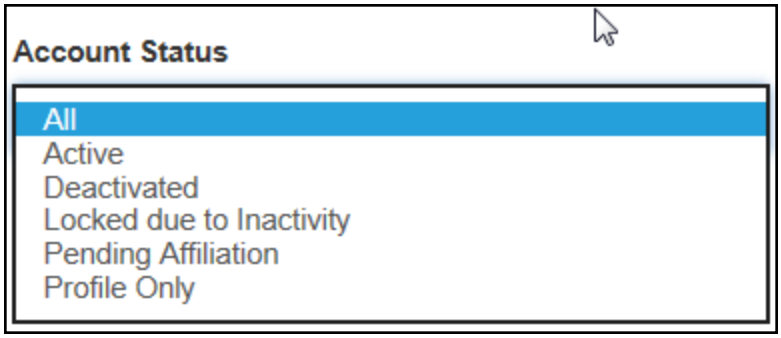
Search by Role

To search by role, select a role from the Roles drop-down menu (to select multiple roles, hold the **<Ctrl>** key as you click the roles).

NOTE: When you search by roles, you can only search within your organization. You can select multiple roles, but the default search is for all roles appropriate to the logged in user's account role.

Search by Status

You can search by status to locate accounts that have been deactivated (by an administrator or due to inactivity). To do so, select the appropriate status from the **Account Status** drop-down menu:



Make your selection and click **Search** to proceed.

About Locked Accounts

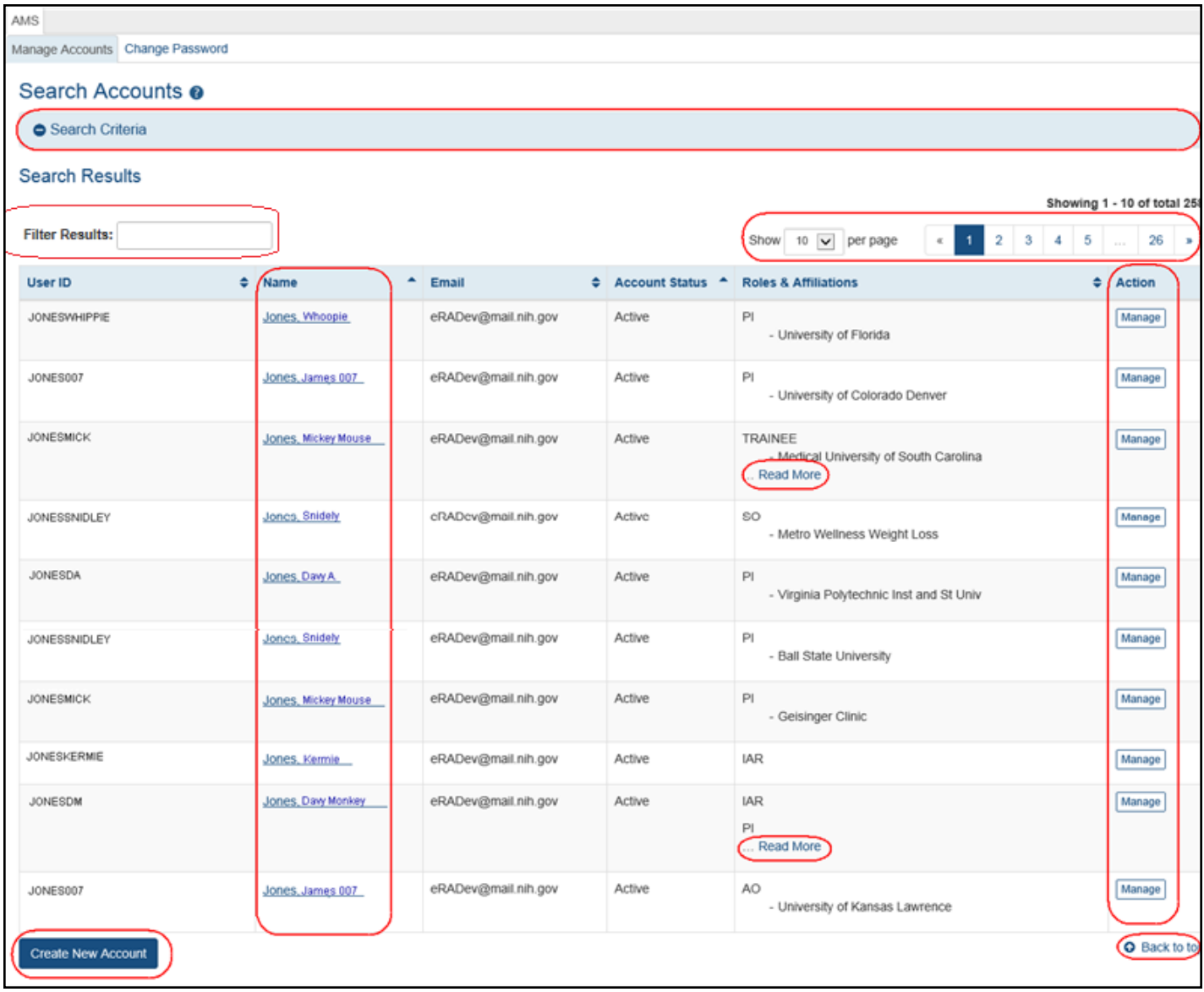
The status *Deactivated* indicates that the account has been disabled by an administrator, while the status *Locked due to inactivity* is applied to accounts that have had no activity for 120 days.

For information on reactivating a deactivated account, see Reactivate or Unlock Account.

Commons User Account Search Results

When you click the **Search** button, the system displays the **Search Results** in the bottom section of the *Search Accounts* screen, .

The search results are sorted alphabetically by name, then by **Account Status**.



NOTE: The **Create New Account** button does not display until a search is performed.

The following columns appear in the search results:

- **User ID**
- **Name** - last name, first name
- **Email**
- **Account Status** -
  - *Active* - The **Manage** button displays in the **Action** column.
  - *Pending* - The **Resend Email** button displays in the **Action** column.
  - *Pending Affiliation* - The **Manage** button displays in the **Action** column.
  - *Profile Only* - The **Create** button displays in the **Action** column.
- **Roles & Affiliations**
- **Action** - The **Action** buttons are **Manage**, **Resend Email**, and **Create**.

NOTE: The **Resend Email** button is for Commons and external iEdison users only.

Search Accounts Screen Displaying Search Results

Perform one or more of the following steps :

1. To view the **Search Criteria**, click anywhere in the **Search Criteria** bar.
2. To filter the search results, enter the appropriate value in the **Filter Results:** text box and hit the **<Enter>** key.
   a. For example, to view all users with the Internet Assisted Review (IAR) role, type *IAR* in the **Filter Results:** text box.

NOTE: The default number of records per page is 10.

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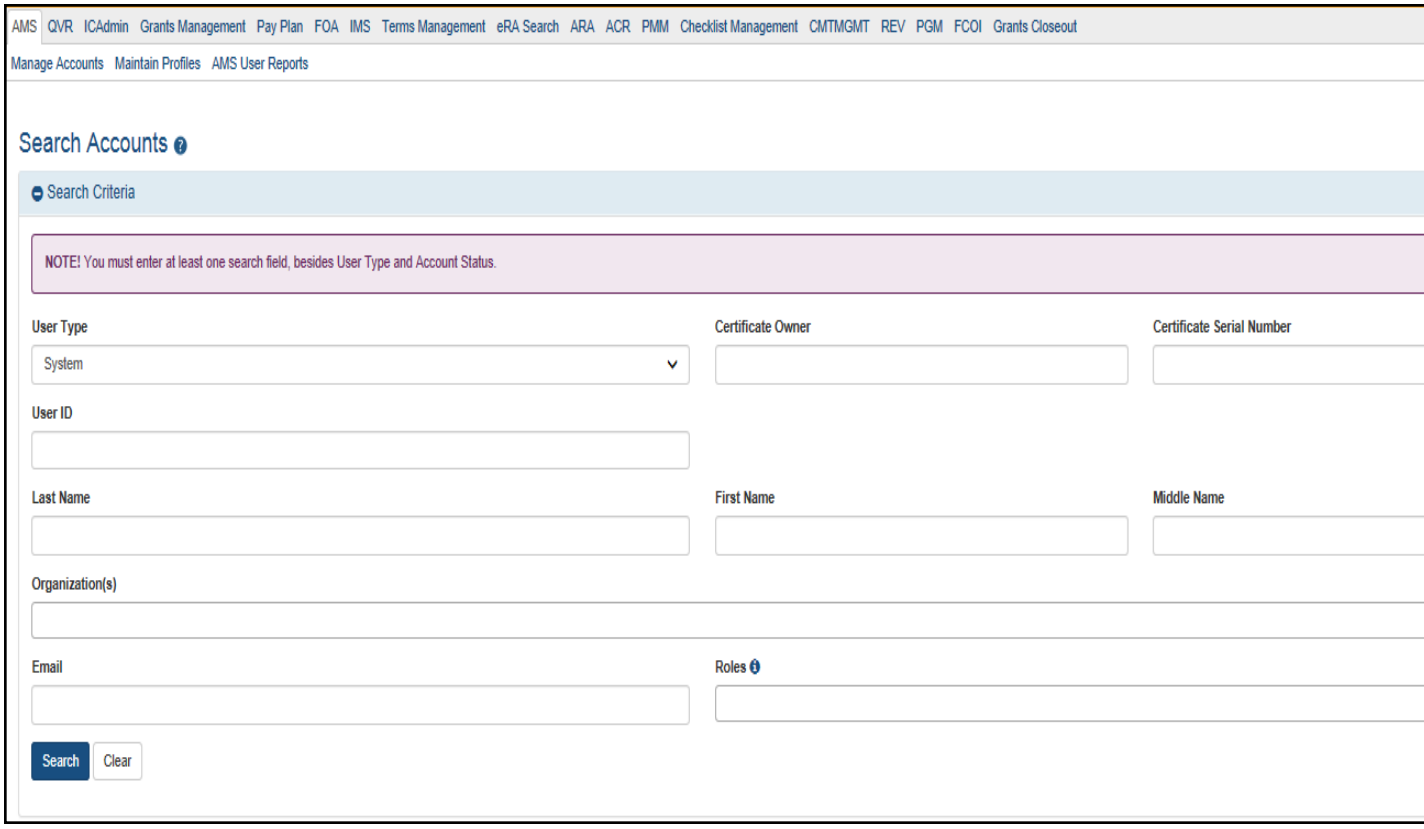
3. To change the number of records per page, select the appropriate number in the **Show per page** column.
4. To navigate between pages, perform one of the following options:
   a. Click the appropriate **Page Number** button.
   b. Click the **right double arrows** button to go to the end of the list.
   c. Click the **left double arrows** button to go to the beginning of the list.
5. To sort the search results, click the click the appropriate column heading name's **down arrow** (ascending sort) or the **up arrow** (descending sort). The default sort is by **Name** (Last Name, First Name).
6. To view the *NIH Support View* screen, select the appropriate name hyperlink in the **Name** column.

   a. For more information, please see the NIH Support View topic.
7. If displayed, click the **Read More** hyperlink in the **Roles and Affiliations** column to view a Principal Investigator's (PI) multiple affiliations.
8. To perform one of the options in the **Action** column, please refer to the Actions Options topic.
9. To create a new account and profile click the **Create New Account** button at the bottom of the screen.
   a. Please refer to the Create Commons and iEdison User Accounts topic.
10. To return to the top of the screen, click the **Back to top** hyperlink.

Search for System Accounts

The , provides the ability to search for existing user and system account(s).

NOTE: Agency, Commons, and external iEdison users can search for and create system accounts.



Search Accounts Screen Displaying Searching for System Accounts

NOTE: You must enter at least one search field, besides the **User Type** and **Account Status**.
Wild card characters such as the percent sign (%) can be used to search for a string of characters.

Perform the following steps:

1. To search for a system account, select *System* from the **User Type** field's drop-down menu.
2. Enter the appropriate search criteria in at least one of the other search fields besides **User Type**.
3. Use the **User ID** field to search by IMPACII user ID
4. If you wish, select a **Role** from the drop-down menu. (To select multiple roles, hold the **<Crtl>** key and highlight the desired roles.)

NOTE: When you search by system roles, you can only search within your organization. You can select multiple roles, but the default search is for all roles appropriate to the logged in user's account role.

5. Click **Search** to execute the search or click **Clear** to clear the fields and start over.

System Account Search Results

When the **Search** button is clicked, the system displays appropriate system accounts in the **Search Results** located below the *Search Criteria* section on the *Search Accounts* screen. The search results are sorted alphabetically first by last name, first name in the **Name** field and then by **Account Status**.

NOTE: The **Create New Account** button does not display until a search is performed.

The following columns appear in the search results:

- **User ID**
- **Name** - last name, first name
- **Organization**
- **Roles & Affiliations**

- **Certification Owner** - The **Certificate Owner** is the organization who acquired the certificate.
- **Action** - Option button is **Manage**.

AMS FCOI

Manage Accounts

Search Accounts

Search Criteria

Search Results

Showin

Filter Results:

Show 10 per page

User ID	Name	Organization	Roles & Affiliations	Certificate Owner
SYS_SHORTYT_460	Shorty, Tall	Hobart and William Smith Colleges	APPLICANT_RETRIEVAL_DATA_SERV - Hobart and William Smith ... Read More	HOBART
SYS_SMITHB_199	Smith, Black	National Cancer Foundation	APPLICANT_RETRIEVAL_DATA_SERV - National Cancer ... Read More	NATIONAL CANCER FOUNDATIO
SYS_SHORTSJ_902	Shorts, Jim	National Institute of Health	APPLICANT_RETRIEVAL_DATA_SERV - National Institute of ... Read More	NIH
SYS_SMARTG_439	Smart, Get	University of California Los Angeles	APPLICANT_RETRIEVAL_DATA_SERV - University of California ... Read More	NCI
SYS_SMOEJ_81	Smoe, Joe	University of California Los Angeles	APPLICANT_RETRIEVAL_DATA_SERV - University of California ... Read More	UNIVERSITY OF CALIFORNIA
SYS_SALEMP_748	Salem, Mass	University of Michigan	APPLICANT_RETRIEVAL_DATA_SERV - University of Michigan ... Read More	UNIVERSITY OF MICHIGAN
SYS_SALEMP_974	Salem, Mass	University of Michigan	APPLICANT_RETRIEVAL_DATA_SERV - University of Michigan ... Read More	UNIVERSITY OF MICHIGAN
SYS_SAA_341	Sack, Sad	TS - Agency for Toxic Substances and Disease Registry	IC_ACCESS_GF_METADATA_SERV	ASD
SYS_SDS_529	Sack, Sad	TS - Agency for Toxic Substances and Disease Registry	ITP_SRVC_COUNCIL_UPDATE_ROLE - Agency for Toxic ... Read More	ASDASD
SYS_SALEMP_463	Salem, Mass	University of Michigan	SERVICE_PROVIDER_ROLE	UNIVERSITY OF MICHIGAN

Create New Account

Search Accounts Screen Displaying System Accounts Search Results

Perform one or more of the following steps :

1. To view the **Search Criteria**, click anywhere in the **Search Criteria** bar.
2. To filter the search results, enter the appropriate value in the **Filter:** text box and hit the **<Enter>** key.
   a. For example, to view all users with the last name of Salem, type *Salem* in the **Filter:** text box.

NOTE: The default number of records per page is 10.

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5. To change the number of records per page, select the appropriate number in the **Show per page** column.
6. To navigate between pages, perform one of the following options:
   a. Click the appropriate **Page Number** button.
   b. Click the **right double arrows** button to go to the end of the list.
   c. Click the **left double arrows** button to go to the beginning of the list.
7. If displayed, click the **Read More** hyperlink in the **Roles and Affiliations** column to view a system user's multiple affiliations.
8. To manage a system account, click the **Manage** button in the **Action** column.
   a. Please refer to the Manage System Accounts topic for more information.
9. To create a new account and profile click the **Create New Account** button at the bottom of the screen.
   a. Please refer to the Create System Account topic for more information.
10. To return to the top of the screen, click the **Back to top** hyperlink.

Funding Support Screen

The *Funding Support* screen lists the NIH application information associated with the selected Principal Investigator (PI). Use this information to positively identify PIs associated with your institution.

NOTE: The *Funding Support* screen is for Commons and external iEdison users only.

AMS

Manage Accounts

Funding Support

Name Dusty Rusty Rhoades

Showing 1 - 5 of total 5

The NIH Support page lists the NIH application information associated with the selected **Principal Investigator (PI)**. Use this information to positively identify PIs associated with your institution.

Name	Institution Name	Support Type	Support Identification	Support Description	Support Start Date	Support Status
Dusty Rusty Rhoades	UNIVERSITY OF CALIFORNIA LOS ANGELES	Trainee Appointment	5T32CA999999-37	UCLA Tumor Immunology Training Program	2013-04-01	Awarded
Dusty Rusty Rhoades	UNIVERSITY OF CALIFORNIA LOS ANGELES	Trainee Appointment	5T32CA999999-38	UCLA Tumor Immunology Training Program	2014-04-01	Awarded
Dusty Rusty Rhoades	UNIVERSITY OF CALIFORNIA LOS ANGELES	Trainee Appointment	2T32CA999999-36A1	UCLA Tumor Immunology Training Program	2012-04-23	Awarded
Dusty Rusty Rhoades	UNIVERSITY OF NOTRE DAME	Trainee Appointment	5T32GM999999-03	Chemistry-Biochemistry-Biology Interface Training Program At Notre Dame	2009-07-01	Awarded
Dusty Rusty Rhoades	UNIVERSITY OF NOTRE DAME	Trainee Appointment	5T32GM999999-02	Chemistry-Biochemistry-Biology Interface Training Program At Notre Dame	2008-07-01	Awarded

Employment History

Showing 1 - 1 of total 1

Funding Support Screen

Create Accounts

You can create the following types of accounts:

Create User Accounts

Create System Accounts

Create a Commons account for an individual(e.g., PD/PI)

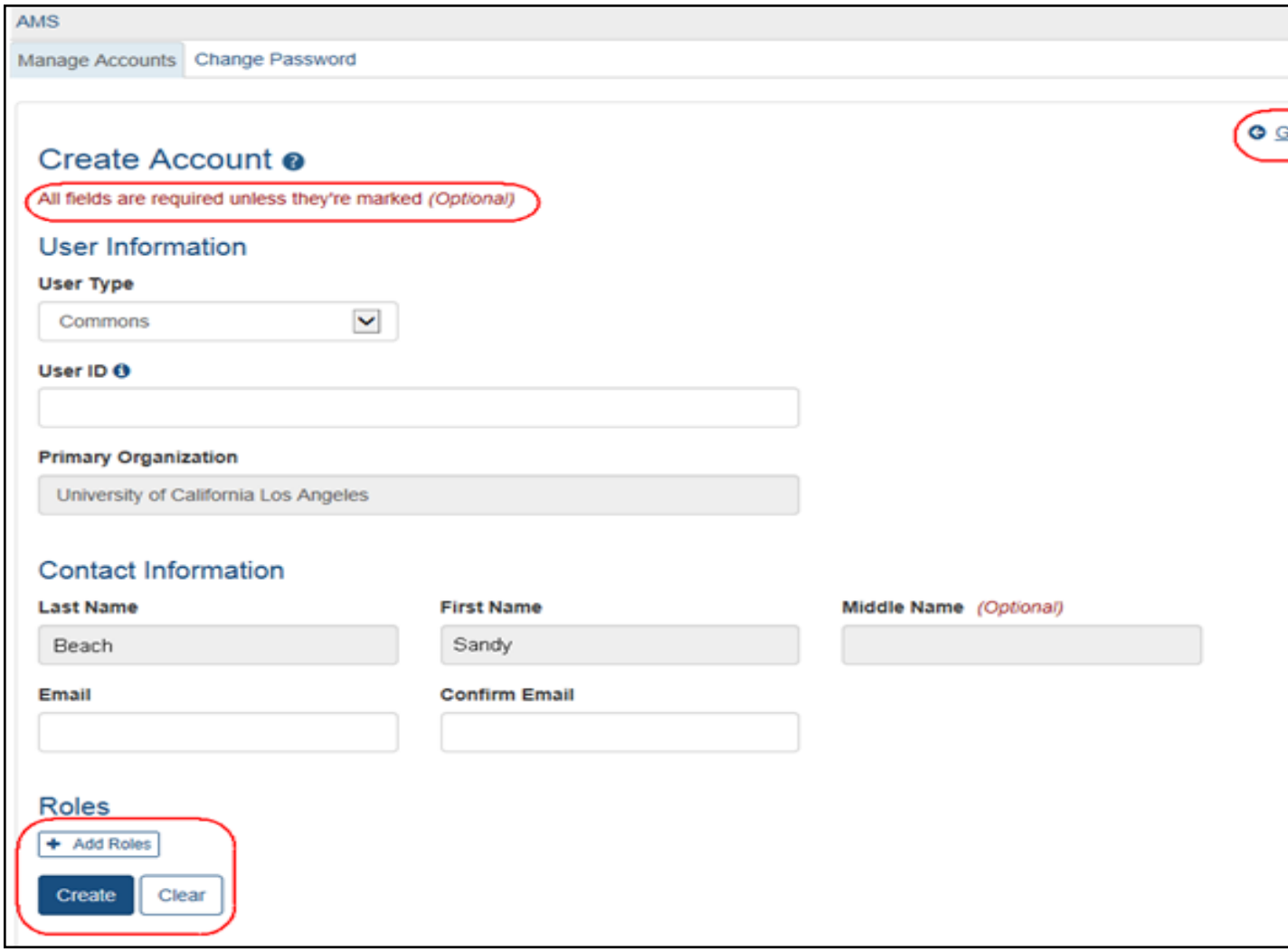
If you are a Commons user with an SO, AA or BO role, you have the ability to create new Commons user accounts (such as for a PD/PI).

IMPORTANT: PD/PIs cannot create their own accounts: Only an SO or AA Commons user can create this account.

1. To create a new user account, first search AMS to make sure the user doesn't already have an account. For instructions, seeSearch Account for Commons Accounts.
2. You launch the create-account process from the Search Results screen screen.
   - In the search results, profiles that are not already associated to a user account display a **Create** button in the Action column:

     Click the **Create** button to create a user account for that profile.
   - Or click the **Create New Account** button located below the search results:

3. When you click one of the **Create** buttons, the *Create Account* screen opens, as shown below.



Create Account Screen for an External Account

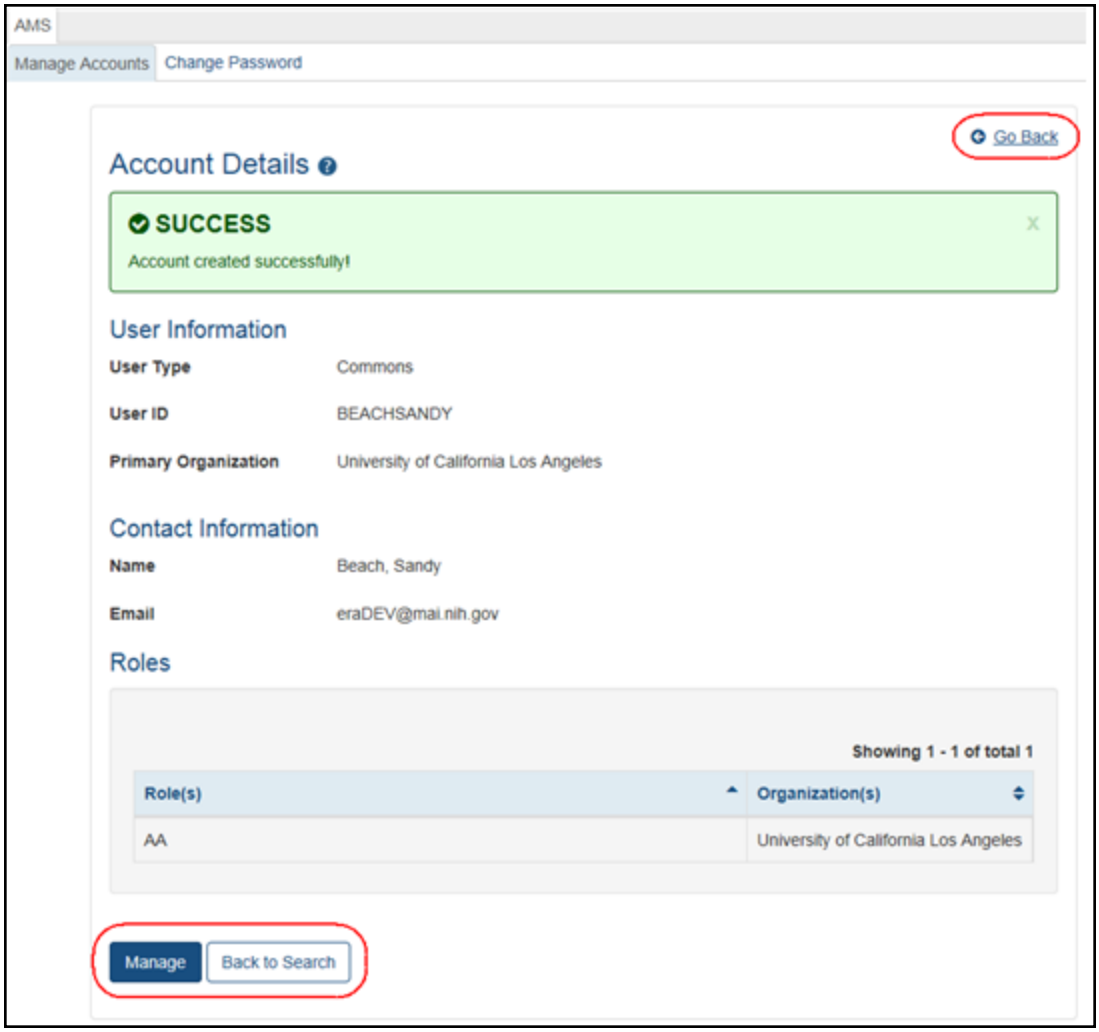
Perform the following steps to create an account:

4. Set **User Type** to Commons.
5. Enter the **User ID** or let the system generate one.
    a. The **User ID** length should be between 6 and 30 characters and should **NOT** contain special characters except the @ sign, the hyphen, the period, and the underscore.
    b. The system can display the following messages: *This User ID is available* OR *This User ID is already taken, please use another one*.
6. Usually the **Primary Organization** defaults to the logged in user's organization.

a. If there is no user organization name selected, click the magnifying glass icon to assign a **Primary Organization**. (See Set Primary Organization for more information.)

7. Perform one of the following options:
   a. When the account information is complete, click **Create** to create the account or click **Clear** to clear all information from the form.

When you click **Create**, the system displays the *Account Details* screen with a success message, as shown here.



Account Details Screen with success Message

6. Perform one of the following options on the *Account Details* screen:
   a. To return to the *Search Accounts* screen displaying the previous search results, click the **Go Back** hyperlink.
   b. To edit the account's information, click the **Manage** button.
      i. For more information, please refer to the Manage Account for Commons Users topic.
   c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

Account Invitations from eRA Systems

Create-Account requests for eRA accounts that are validated by invitations from eRA modules can be approved or rejected automatically:

- If the identifying information the new user submits unambiguously matches the profile created by the account requester and the profile is not already associated to another user account, the request is approved automatically.
- If the identifying information is incorrect or an account already exists for the user profile, or if a comment has been entered in the user's funding and committee service history, request is denied and the system sends notifications to the account requester and to the eRA Service Desk.

Examples of system-generated account invitations:

- **SO creates a new PI account in AMS**

  The new PI receives a system-generated invitation to log in to eRA Commons and validate the account.

- **SRO enables a new reviewer in Internet Assisted Review (IAR)**

  The reviewer receives a system-generated invitation to log in to eRA Commons and create an account to access IAR. See the IAR Online Help for information on enabling reviewers

- **PD/PI appoints a new trainee in xTrain**

The trainee receives a system-generated invitation to log in to eRA Commons and create an account to access xTrain. See xTrain Online Help for information on appointing trainees.

Workflow

The account invitation procedure includes these steps:

1. The account requester creates the new account.
2. The new user receives an email notification that includes the username and other details about the new account.
3. The user receives a second email that includes a temporary password for the new account and instructions for logging into the system. This email explains that that the user must login to the system that day or the account will be locked. After an account is locked, any attempt to log in will be redirected to the password reset/lost password workflow.. See Initial Login to eRA Account.
4. The user logs in with the provided credentials and is immediately instructed to create a new password for the account.

NOTE: If the user enters incorrect login information too many times, the account is locked and the user must contact the eRA Service Desk to complete the login process.

Add/Delete User Roles

NOTES:

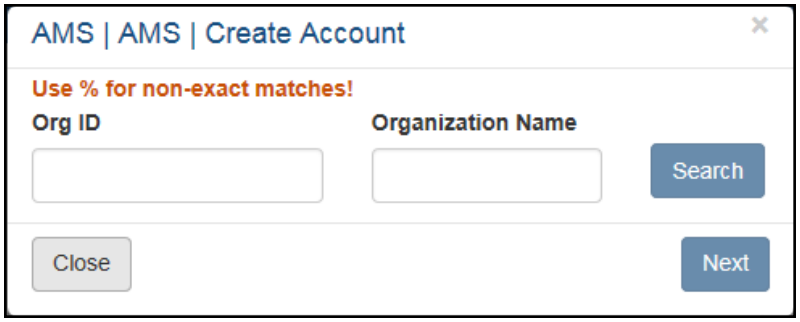
- The list of roles displayed is dependent on the logged in user's role.
- Accounts with scientific roles should be maintained for the career of the scientist and affiliations should be added as necessary.
- Administrative roles cannot be combined with scientific roles on the same user account and accounts with administrative roles cannot be affiliated with more than one institution.

---

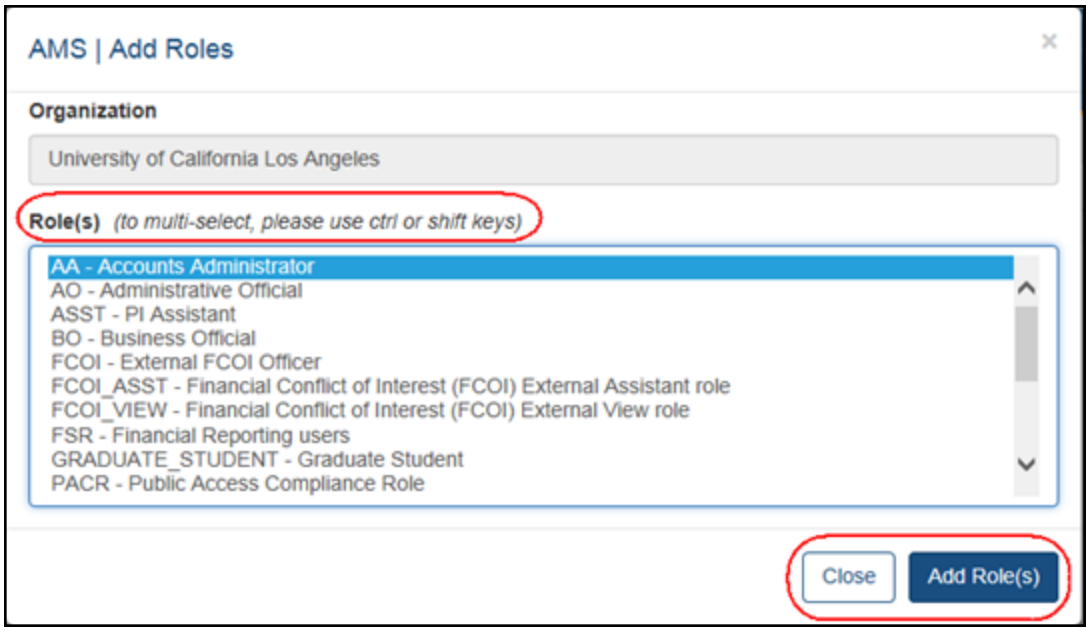
1. To add user roles to an account, click on the **+ Add Roles** button at the bottom of the *Create Accounts* or *Manage Accounts* screen, as shown here.

When you click **+ Add Roles**, the *Add Roles* screen opens, as shown below.

NOTE: If you click **+ Add Roles to other org**, the window shown here will open first, so you can search for and select the other organization.



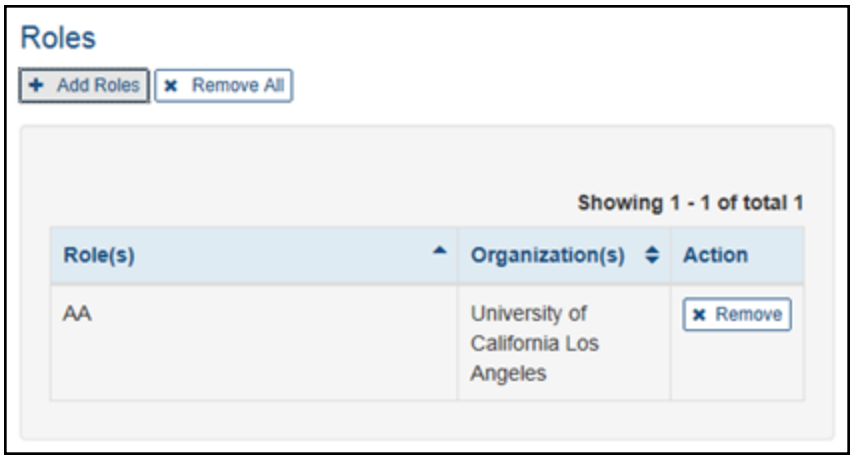
Select the organization and click **Next** to proceed to the *Add Roles* screen as described below.



Add Roles screen

1. Scroll through the list and click to select the appropriate role(s).
   Note: For reference, here is a complete list of Commons user roles.
2. Click the **Add Role(s)** button.

When you click **Add Roles(s)**, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s) .



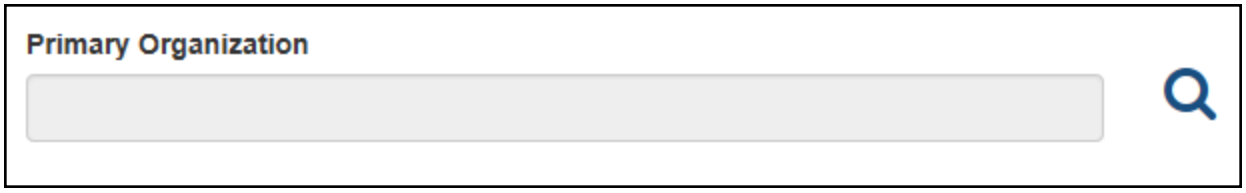
Roles Section on the Create Accounts Screen

3. To add additional roles, click the **+ Add Roles(s)** button and repeat the steps above.
4. To remove a role, click the appropriate **Remove** button in the **Action** column.
5. To remove all roles, click the **Remove All** button.

NOTE: You cannot remove Signing Official (SO) role when the Research Performance Progress Report (RPPR) is assigned.

Set Primary Organization

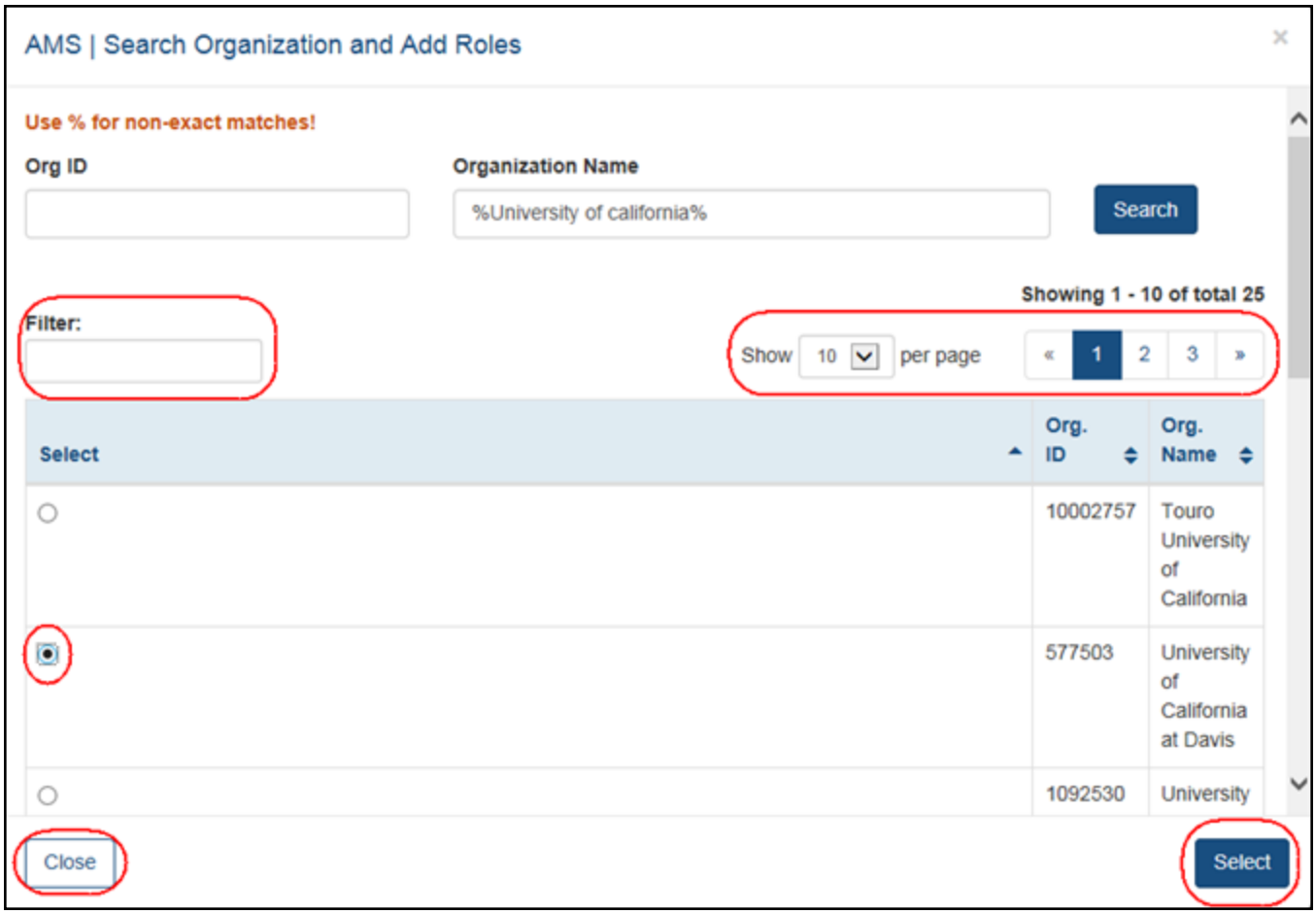
NOTE: The **magnifying glass** for the **Primary Organization** field on the *Create Account* screen appears if the logged in user is not affiliated with an Organization, IC, or Agency. Usually the **Primary Organization** defaults to the logged in user's Organization.



Primary Organization Field

1. To add a primary organization click the **magnifying glass** icon on the *Create Account* screen.

When the **magnifying glass** icon is clicked, the *Search Organization and Add Roles* screen opens.



Search Organization and Add Roles Screen

2. Enter an **Org ID** or an **Organization Name**.

NOTE: Wild card characters such as the percent sign (%) can be used to search for a string of characters.

---

3. Click the first **Search** button.

When the first **Search** button is clicked, the organization is displayed, if present.

4. To filter the search results, enter the appropriate value in the **Filter:** text box and hit the **<Enter>** key. For example, enter *San Diego* to view only those universities in California.
5. To change the number of records per page, select the appropriate number in the **Show per page** column.

6. To navigate between pages, perform one of the following options:
   a. Click the appropriate **Page Number** button.
   b. Click the **right double arrows** button to go to the end of the list.
   c. Click the **left double arrows** button to go to the beginning of the list.
7. Select the appropriate organization's radio button.
8. Click the second **Select** button or click the **Close** button to close the screen.

When the second **Select** button is clicked, the *Create Account* screen displays the selected primary organization. For more information see Create External User Accounts.

Create System Accounts

System accounts are used to access eRA Web Services.

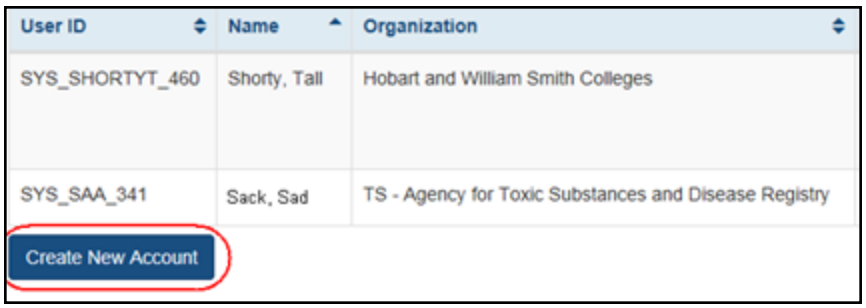
Agency, Commons, and external iEdison users can create system accounts.

1. To create a system account, first perform a search to make sure the account you want to create does not already exist.
   a. For instructions see Search System Accounts.

NOTE: The **Create New Account** button described below is not available until a search is performed.

---

2. Review the search results to see if the account you want already exists, and if not, click the **Create New Account** button that appears below the search results, shown here:



User ID	Name	Organization
SYS_SHORTYT_460	Shorty, Tall	Hobart and William Smith Colleges
SYS_SAA_341	Sack, Sad	TS - Agency for Toxic Substances and Disease Registry

Create New Account

When you click **Create New Account**, the .

3. Select *System* in the **User Type** drop-down menu.

When you select user type *System*, the screen displays the fields you need to complete for a system account.

AMS

Manage Accounts | Change Password

Go Back

Create Account

All fields are required unless they're marked *(Optional)*

User Information

User Type

System

Primary Organization

University of California Los Angeles

Certificate Information

Certificate Owner

Univ of CA - Los Angeles

Certificate Provider/Authority

Go Daddy Certificate Authority

Certificate Serial Number

SB:12:34:56:78:90

Contact Information

Last Name: Whiplash

First Name: Snidely

Middle Name *(Optional)*:

Email: Whiplash@ucla.edu

Confirm Email: Whiplash@ucla.edu

Roles

Add Roles | Remove All

Showing 1 - 1 of total 1

Role(s)	Organization(s)	Action
APPLICANT_RETRIEVAL_DATA_SERV	University of California Los Angeles	Remove

☑ I am aware of and understand my responsibilities in providing the information pertaining to this system account.

Create | Clear

Create Account Screen Displaying Creating a System Account

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

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

---

6. Enter the **Certificate Serial Number** in the format XX:XX:XX:XX:XX:XX:XX:XX.

For information on obtaining and registering a certificate from a Certificate Provider or Authority, refer to one of the Web Services Certificate (S2S) Guide:

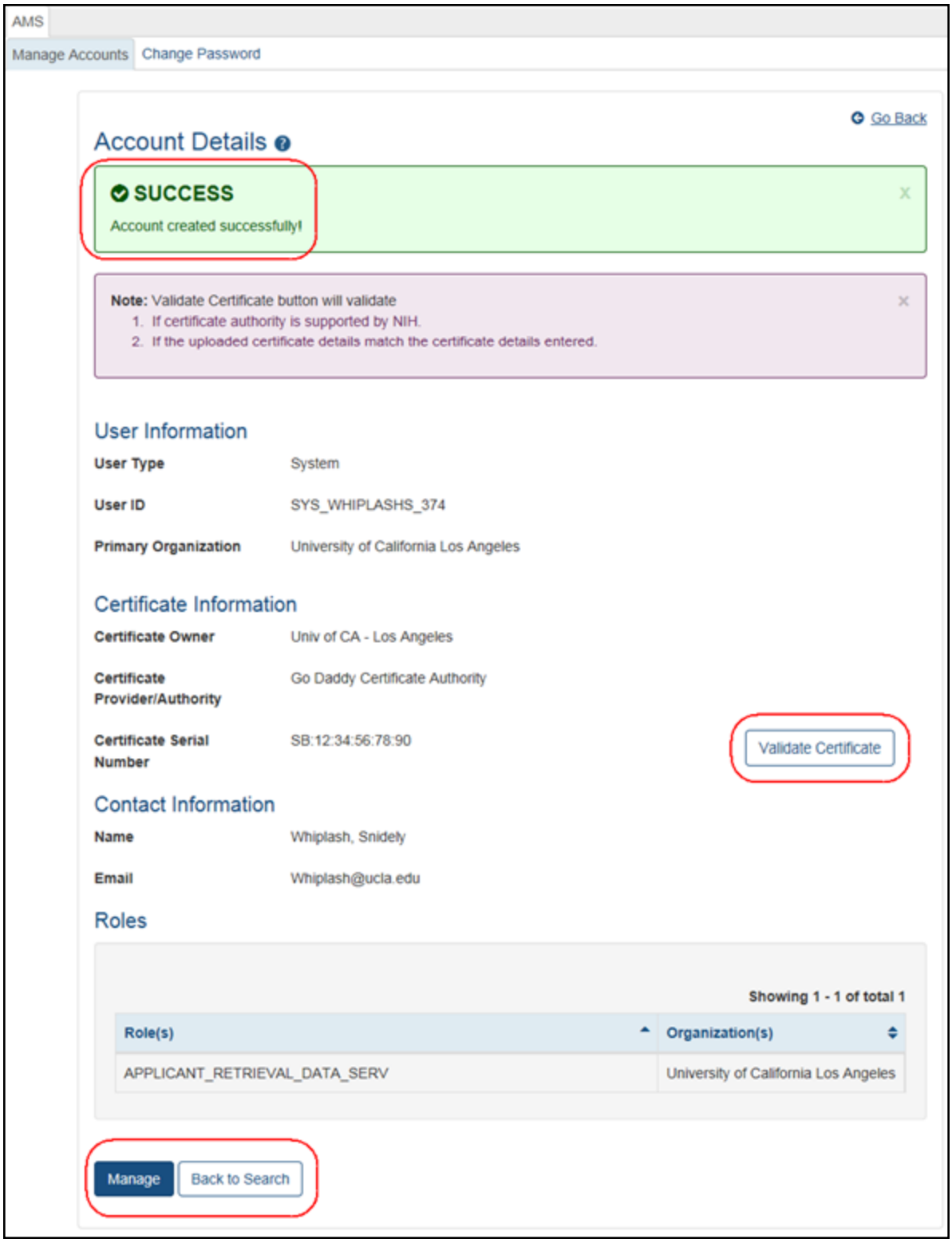
- Section 2.4.3 for Commons users - only users with the SO role have the privileges necessary to register the certificate in AMS; Commons users must work with their SO to register their certificate

2. Complete the **Contact Information**.
3. Click the **Add Roles** button to add the roles to the account.
   a. Note the role description on the screen when adding a role.
   b. See Add System Roles for more information.
4. Select the **Agreement** check box below the *Roles* section.

The **Agreement** check box is mandatory for the user to acknowledge information provided for the system account. If the **Agreement** check box is not checked and the **Save** button is clicked, the system displays the following error message: *User must accept the agreement by checking the field*.

5. Click the **Create** button to create the account or click **Clear** to clear all fields.

When you click **Create**, the system validates the account information. If there are no errors, then the *Account Details*screen opens, displaying a success message, .



Account Details screen displaying success message

Other Actions:

- Click the **Validate Certificate** button to validate the certificate. See Validate Certificate for more information.
- Click the **Manage** button if you want to make additional changes. See Manage System Accounts for more information.
- Click the **Back to Search** button to return to the *Search Account* screen.

Add System Roles

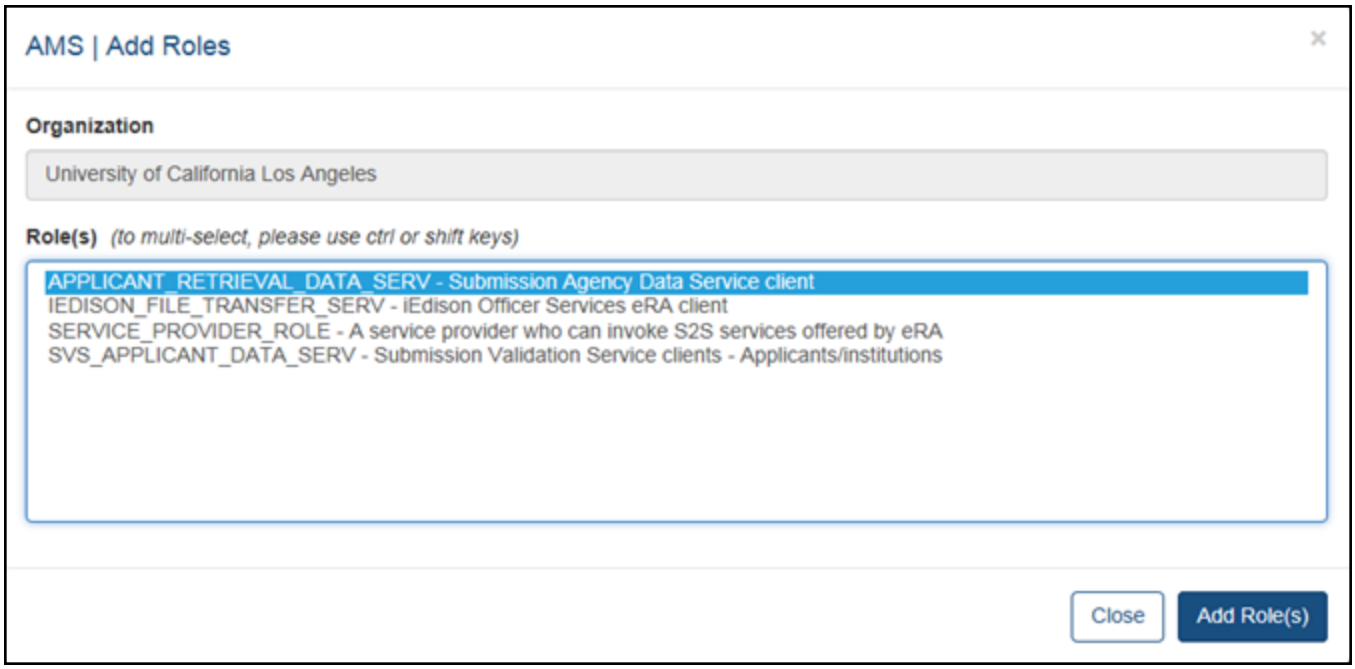
NOTE: The list of roles is dependent on the logged-in user's role.

1. To add system roles to the account, click on the **+ Add Roles** button on the *Create Accounts* screen.

Add Roles Button on the Create Account Screen

When the **+ Add Roles** button is clicked, the pop-up *Add Roles* screen displays.

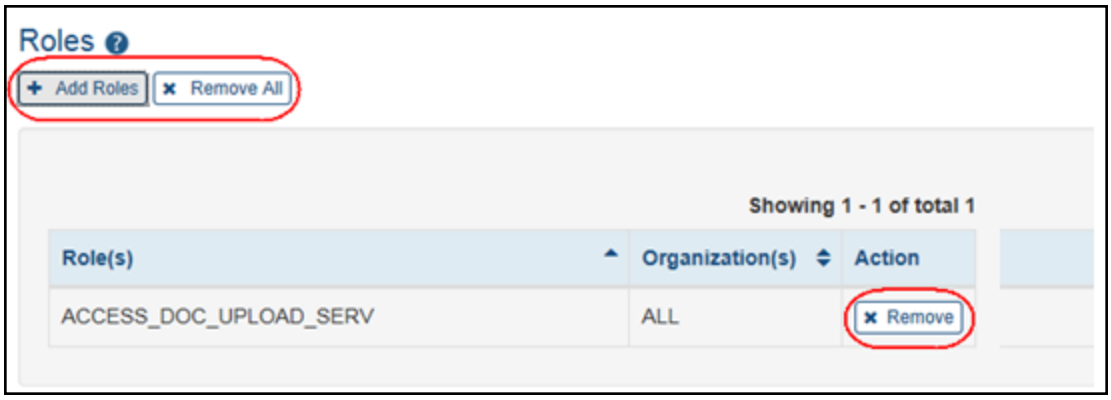
External System Roles



Add Roles Screen for External System Roles

1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

When the **Add Roles(s)** button is clicked, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).



Roles Section on the Create Accounts Screen for Agency Users

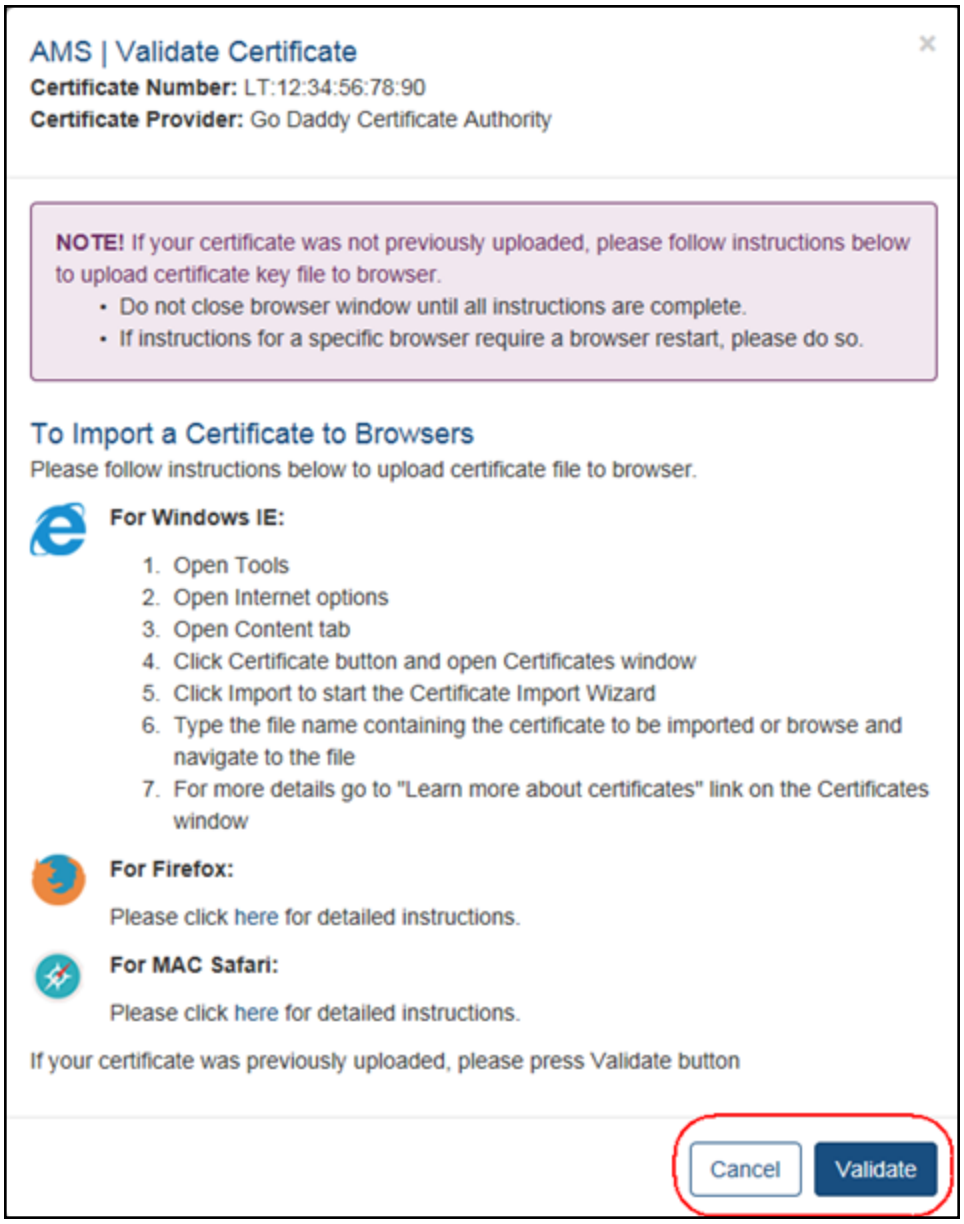
3. To add additional roles, click the **+ Add Roles(s)** button. Repeat the steps above.

4. To remove a role click the appropriate **Remove** button in the **Action** column.
5. To remove all roles click the **Remove All** button.

Validate Certificate

When the **Validate Certificate** button is clicked on either the *Manage Account* or *Account Details* confirmation screen, the system displays the *AMS | 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. Perform one of the following options:
    a. To validate the certificate, click the **Validate** button on the *Validate Certificate* screen.
    b. Click the **Cancel** button to cancel the certificate validation.



Validate Certificate Screen

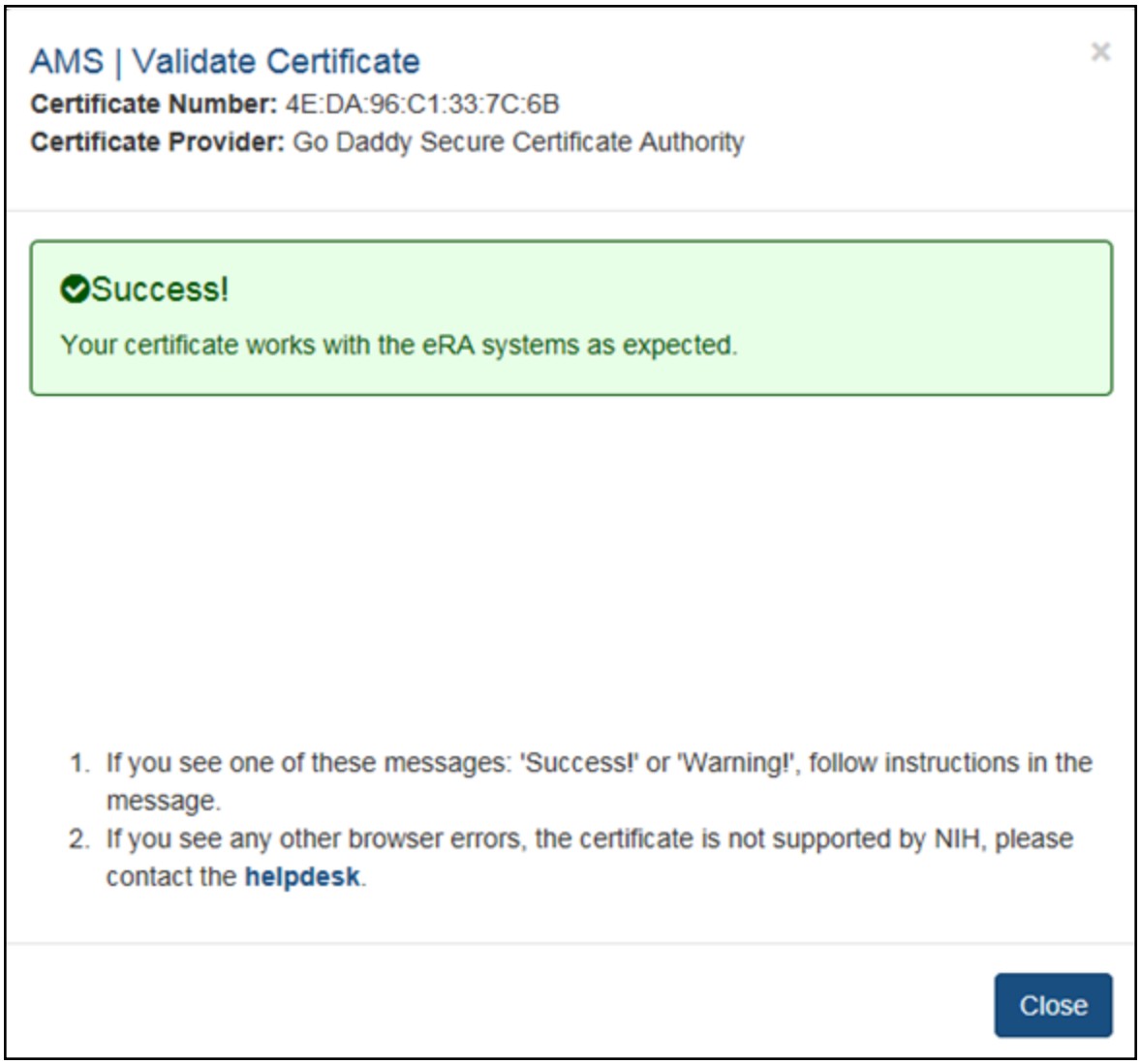
When the **Validate** button is clicked, the system performs the certificate validation.

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 opens:

> *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.

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



Validate Certificate Screen Displaying the Success Message

2. Click the **Close** button to close the screen.

The following audit information is audited and stored in the database:

- Certificate Number – Certificate Number of the uploaded certificate during validation
- Certificate Provider – Common Name of the uploaded certificate during validation
- Certificate Owner – The Certificate Owner that was entered during validation. 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 details does not match the user entered details

Manage Accounts

User Accounts

Once an account is created it can be maintained via the *Manage Accounts* screen.

- Manage User Accounts

System Accounts

Agency, Commons, and iEdison external users can modify system accounts.

- Manage System Accounts

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to the Web Services Certificate (S2S) Guide:

- Section 2.4.3 for Commons users

Managing External User Accounts

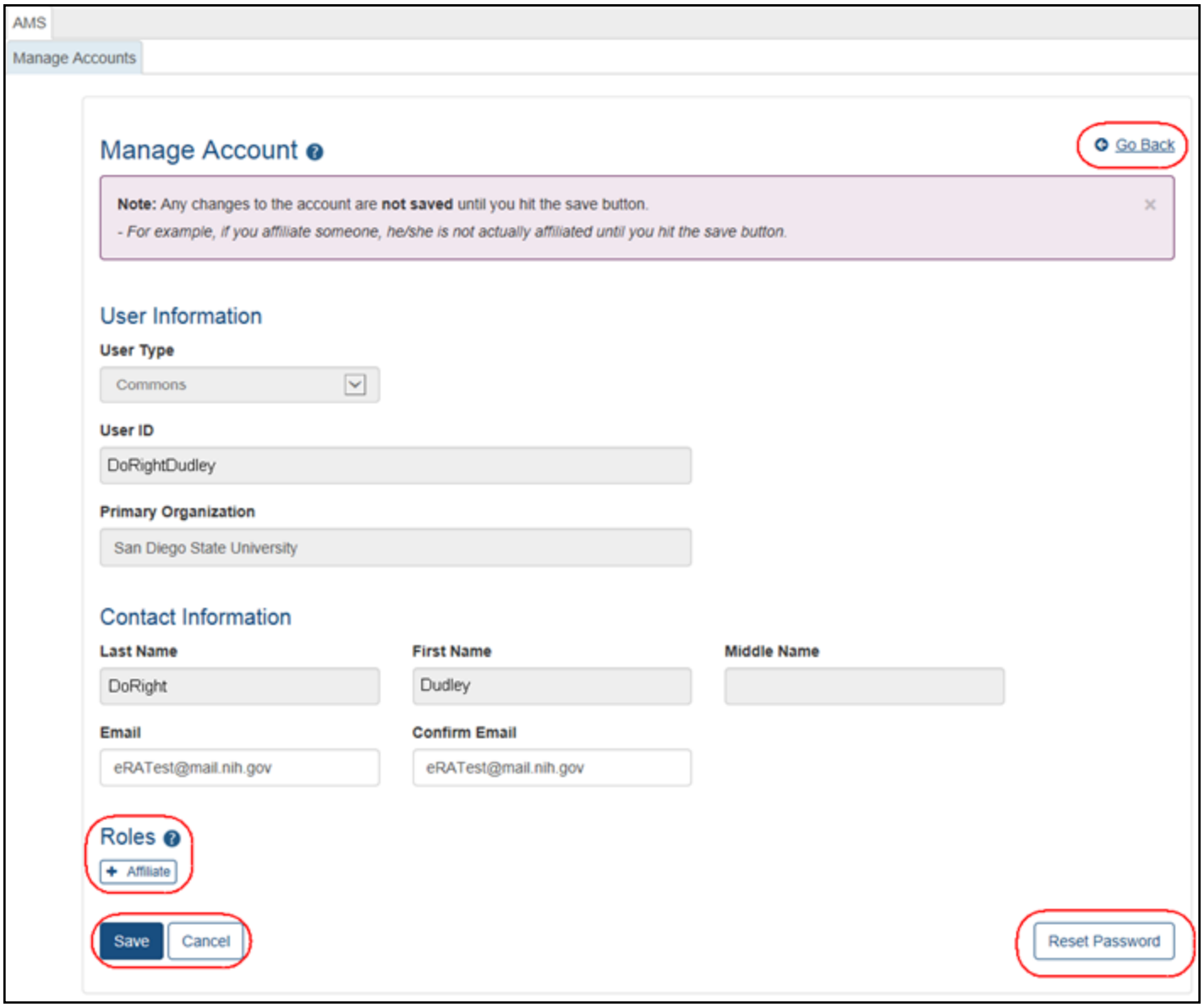
The following roles can manage accounts:

- Account Administrator (AA)
- Administrative Official (AO)
- Business Official (BO)
- Signing Official (SO)
- TTO Administrator

1. Perform one of the following steps to manage a user account:
    a. Click the appropriate **Manage** button in the **Action** column on the *Search Accounts* screen.
    b. Click the **Manage** button on the *Account Details* screen after an account have been created or saved (edited).

When the **Manage** button is clicked via either option, the *Manage Accounts* screen opens.

Here is the Manage Account screen with an account not affiliated with an Organization or Institution.



Manage Account Screen Displaying a Non-affiliated User Account

Here is the Manage Account screen with a user account affiliated with an Organization or Institute.

AMS

Manage Accounts | Change Password

Manage Account

Note: Any changes to the account are **not saved** until you hit the save button.

- For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.

User Information

User Type

Commons

User ID

BONDJ007

Primary Organization

University of California Los Angeles

Contact Information

Last Name

Bond

First Name

James

Middle Name

Email

eraTest@mail.nih.gov

Confirm Email

eraTest@mail.nih.gov

Roles

+ Add Roles | × Unaffiliate

Showing

Role(s)	Organization(s)
AA	University of California Los Angeles

Save | Cancel

Manage Account Screen Displaying an Affiliated Account

An affiliation can be created for accounts that are either not currently associated with an institution, such as an account solely with the Internet Assisted Reviewer (IAR) authority role, or for accounts that need to be associated with multiple institutions. Users with the AA or SO role may create an affiliation for their organization only.

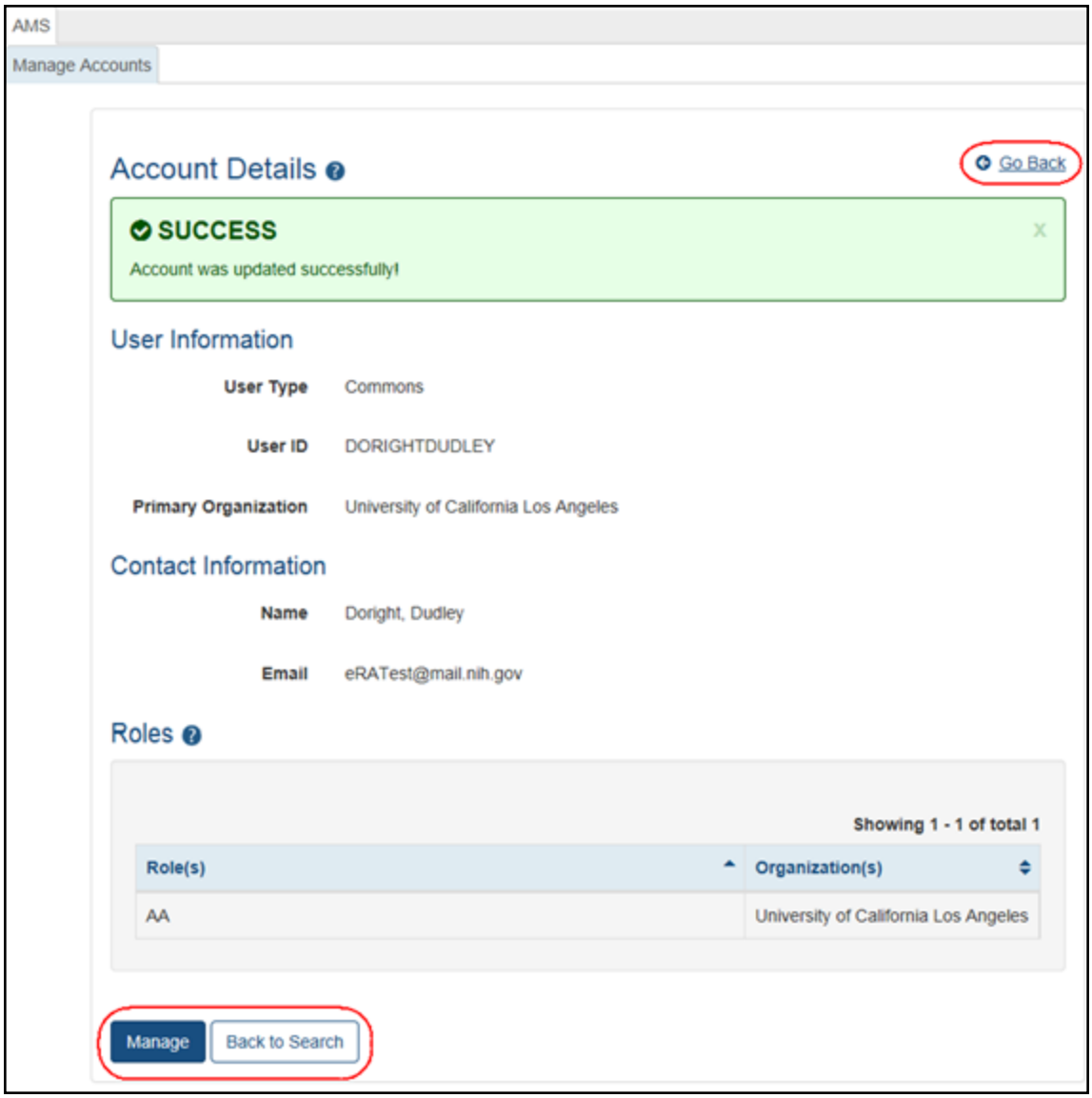
NOTES:

- Administrative and reporting roles such as SO, AA, AO, FSR, etc., cannot be combined with Scientific roles such as PI, TRAINEE, ASST, etc.
- Only accounts with scientific roles such as IAR, PI, TRAINEE, POSTDOC, etc., may have multiple affiliations. If an account has any roles in addition to these, additional affiliations cannot be added.
- Fields grayed out cannot be edited.

Perform one or more of the following steps:

1. Edit the **Email** addresses, if necessary.
2. To add or delete roles click the **+ Add Roles** button.
   a. For more information, see Add/Delete Roles.
3. To affiliate an account with an organization, click the **Affiliate** button, if displayed.
   a. For more information, see Affiliate Account.
4. If the **Unaffiliate** button is present, you can click it to unaffiliate an account.
   a. For more information, please refer to the Unaffiliate Account.
5. If the account has been deactivated, a **Reactivate** button will be present at the bottom of the screen. Click it to reactivate the account. For more information, see Reactivate Account.
6. When you are done, click **Save** to save the changes or click **Cancel** to discard your changes.

When the **Save** button is clicked, the system displays the .



Account Details Screen Displaying Success Message

7. Perform one of the following options:
   a. To return to the *Search Accounts* screen displaying the previous search results, click the **Go Back** hyperlink.
   b. To edit the account's information, click the **Manage** button.
   c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

Account Statuses

AMS user accounts can have the following statuses:

- Active — A valid account in good standing.
- *Deactivated* — Account has been disabled by an administrator
- *Locked due to inactivity* — Locked by the system due to inactivity (no user activity for 120 days)
- *Pending Affiliation* — An individual account that has not been linked to an organization
- *Profile Only* — A user ID that is not associated to an account

Add/Delete User Roles

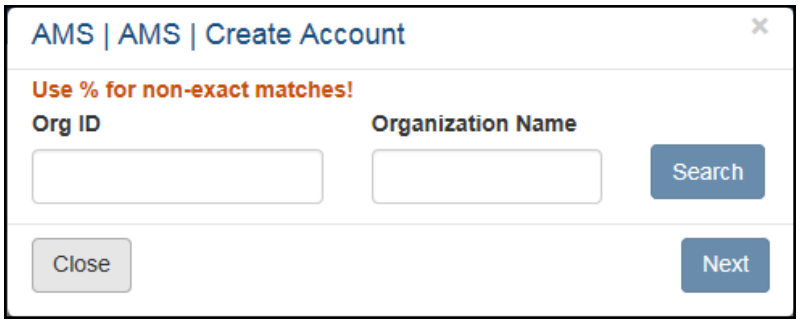
NOTES:

- The list of roles displayed is dependent on the logged in user's role.
- Accounts with scientific roles should be maintained for the career of the scientist and affiliations should be added as necessary.
- Administrative roles cannot be combined with scientific roles on the same user account and accounts with administrative roles cannot be affiliated with more than one institution.

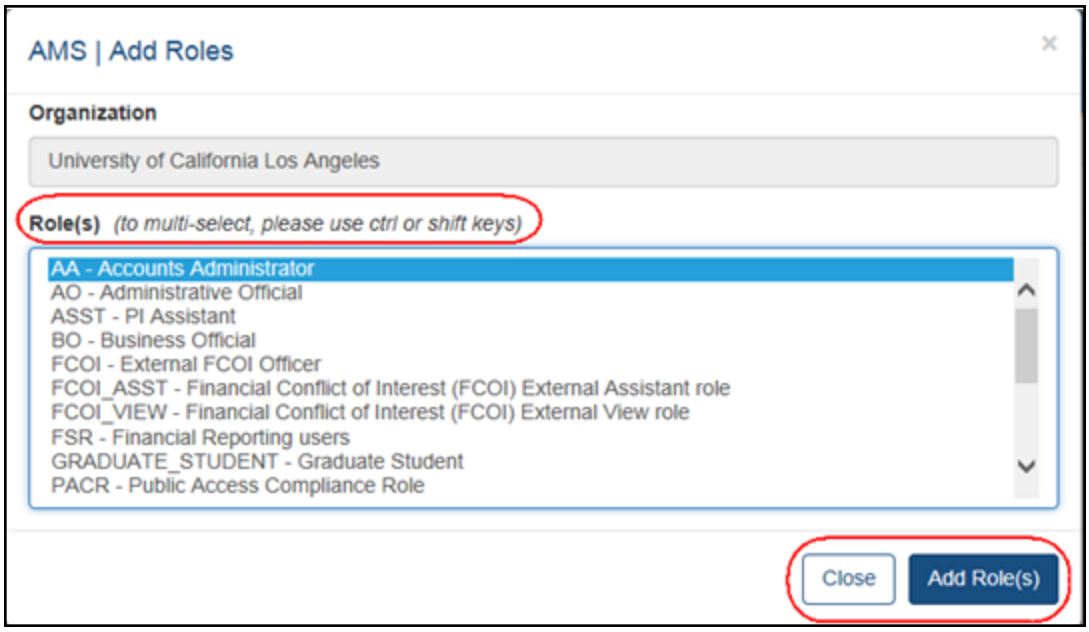
1. To add user roles to an account, click on the **+ Add Roles** button at the bottom of the *Create Accounts* or *Manage Accounts* screen, as shown here.

When you click **+ Add Roles**, the *Add Roles* screen opens, as shown below.

NOTE: If you click **+ Add Roles to other org**, the window shown here will open first, so you can search for and select the other organization.



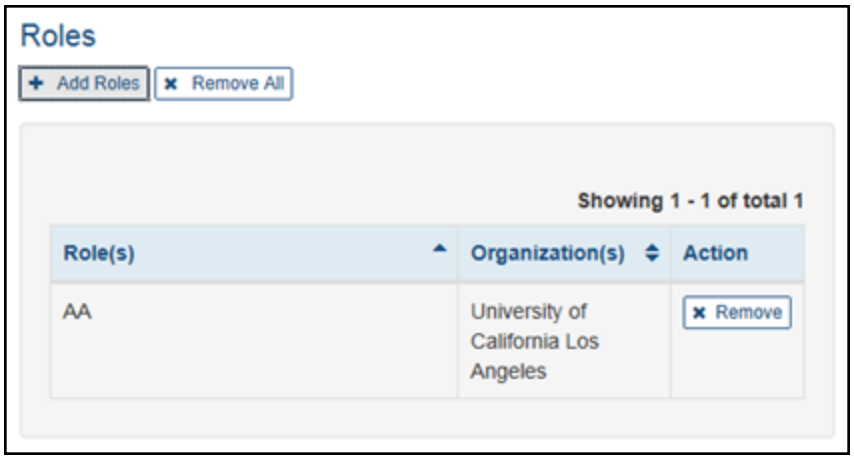
Select the organization and click **Next** to proceed to the *Add Roles* screen as described below.



Add Roles screen

1. Scroll through the list and click to select the appropriate role(s).
   Note: For reference, here is a complete list of Commons user roles.
2. Click the **Add Role(s)** button.

When you click **Add Roles(s)**, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s) .



Roles Section on the Create Accounts Screen

3. To add additional roles, click the **+ Add Roles(s)** button and repeat the steps above.
4. To remove a role, click the appropriate **Remove** button in the **Action** column.
5. To remove all roles, click the **Remove All** button.

NOTE: You cannot remove Signing Official (SO) role when the Research Performance Progress Report (RPPR) is assigned.

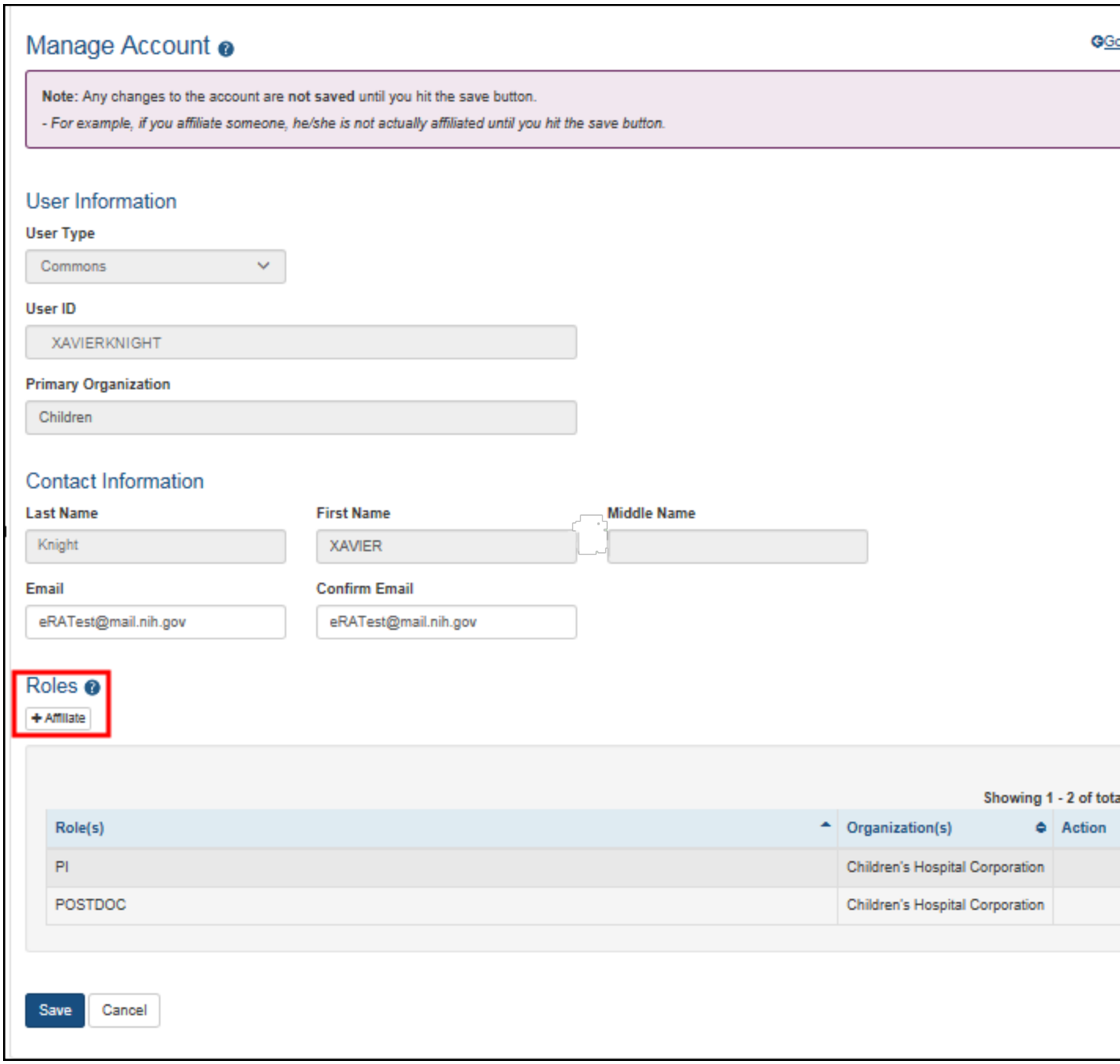
Affiliate Account

NOTES:

- Only accounts with ***scientific*** roles such as PI, SPONSOR, POSTDOC, ASST, etc., are permitted to be affiliated with more than one institution.
- Accounts with ***administrative*** roles can belong to one institution only.
- Further, if a user leaves (unaffiliates) an administrative role at one institution, that account cannot be affiliated to a different institution in any administrative **or** scientific role: The user needs to create a new account to use with the new institution.
- Additionally, you cannot remove administrative roles from an existing account in order to add a scientific role instead: Once a user has held

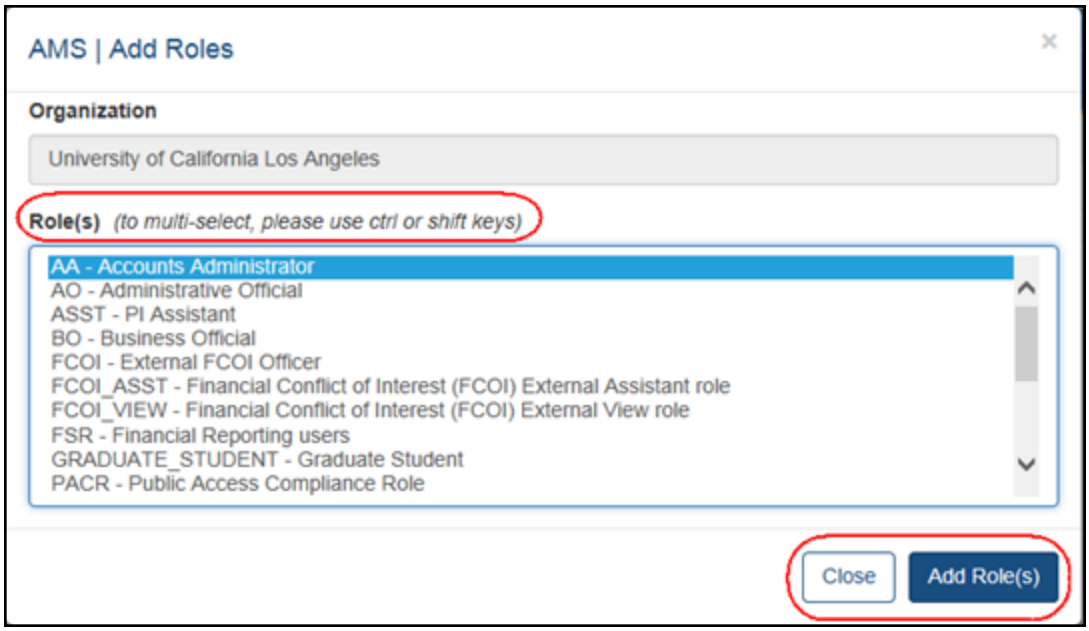
administrative role, he or she must create a new user account to use in another role.

1. To affiliate an existing account with an organization, search for the user in AMS and select the **Manage** button in the action column of the search results.
2. Click the **Affiliate** button under *Roles* on the Manage Account screen, as shown here:



When the **Affiliate** button is clicked, the Add Roles screen opens, as shown here:

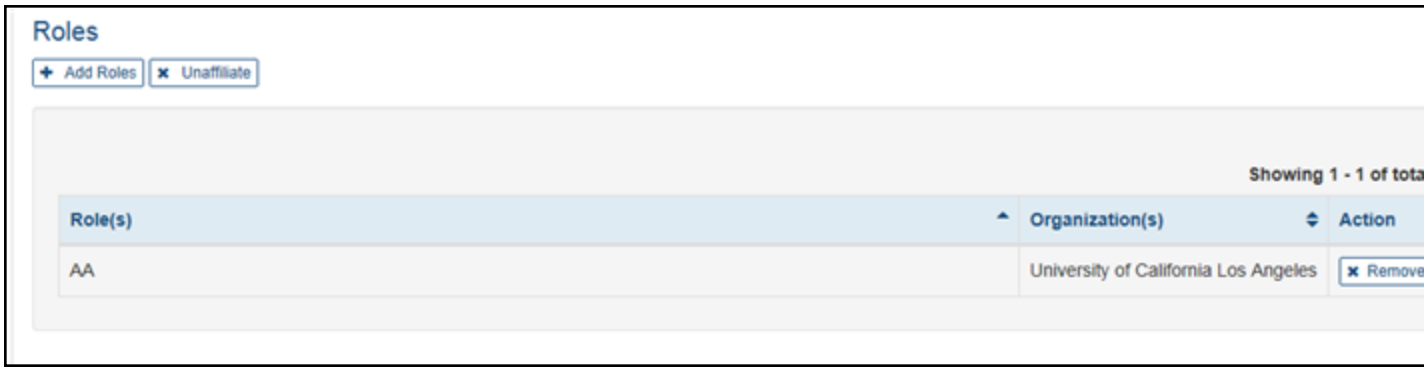
NOTE: The list of roles is dependent on the logged in user's role.



Add Roles screen

1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

When the **Add Role(s)** button is clicked, the role is added, the account is placed in 'Active' status, and the **Unaffiliate** button appears in the *Roles* section, as shown here:

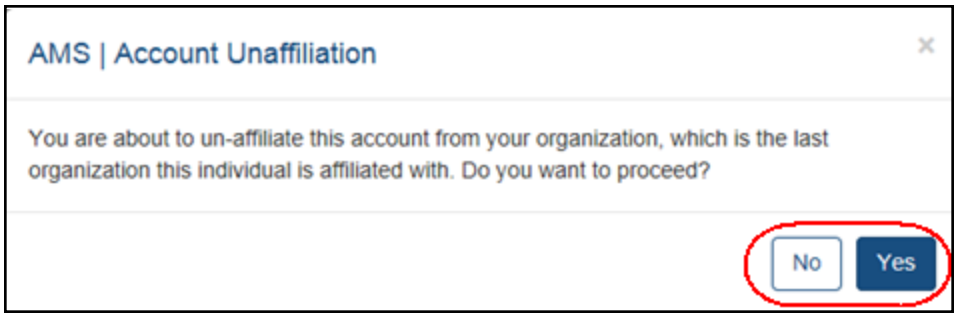


Roles section on the Manage Account screen

Unaffiliate Account

1. To unaffiliate an account, click the **Unaffiliate** button in the *Roles* section of the *Manage Account* screen.

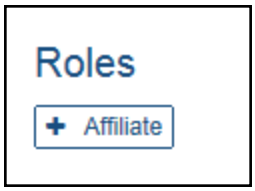
When the **Unaffiliate** button is clicked, an *Account Unaffiliation* pop-up screen displays.



Account Unaffiliation Screen

2. Click the **Yes** button to unaffiliate the account, or click **No** to cancel the unaffiliation.

When the **Yes** button is clicked, all roles assigned to the account are removed, the account is placed in 'Pending Affiliation' status, and the **Affiliate** button appears in the *Roles* section of the *Manage Account* screen, as shown here:



IC Transfer Process

1. The IC Coordinator will un-affiliate the account by removing all roles for their IC.
2. The account will go into 'Pending Affiliation' Status, in which there are no roles associated with the account, and the user cannot perform any functions.
3. An IC Coordinator from the new IC will search for accounts in 'Pending Affiliation' status and select an account to affiliate.

For information on Affiliating an account, see Affiliate Account.

Affiliate Button in Roles Section on Manage Account Screen

Reactivate Account

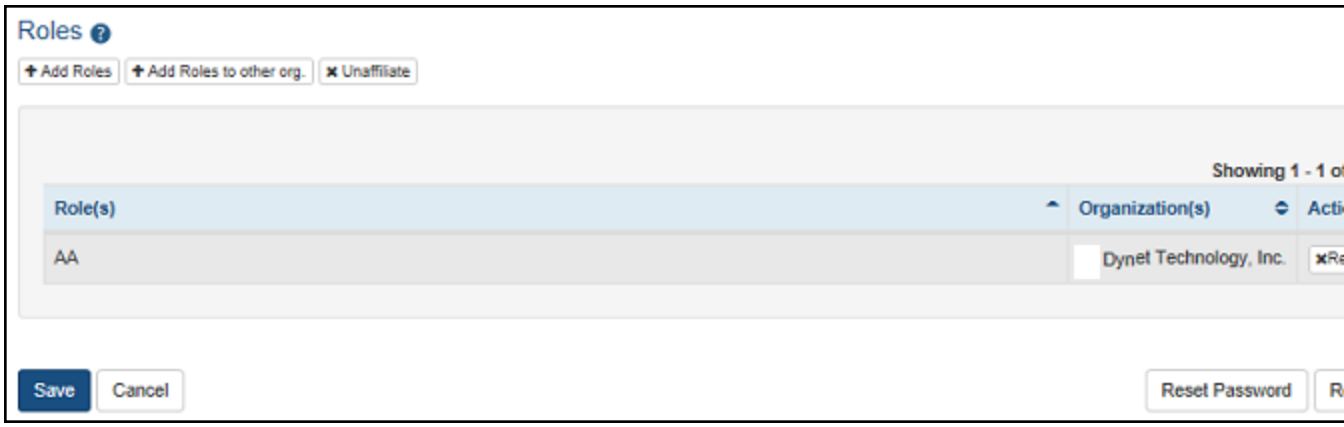
Follow these steps to reactivate an account that has been deactivated by an administrator.

NOTE: Commons users are required to reset their passwords after a defined time period. The system locks the account is if the user fails to rest the password. Use the Reset Password function to unlock these accounts.

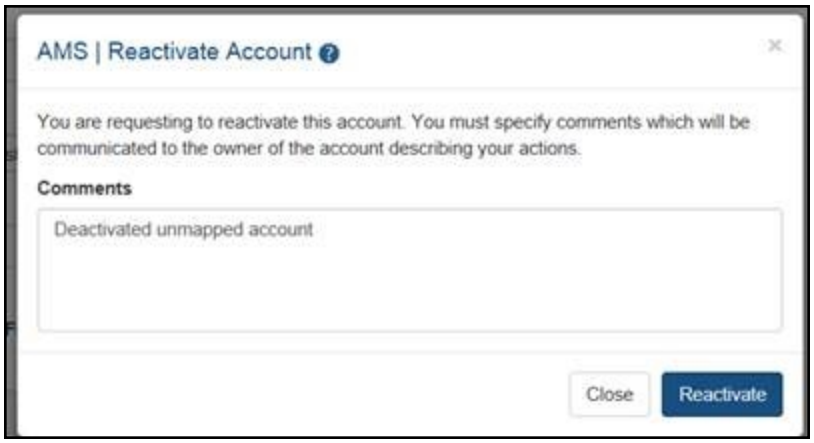
---

1. Open the account in the *Manage Account* screen.

2. If an account is deactivated, a **Reactivate** button will be present at the bottom of the *Manage Account* screen, as shown here. Click this button to proceed.



3. When you click **Reactivate**, the *Reactivate Account* screen opens, as shown here.



Reactivate Account screen

4. In this screen, take these steps:

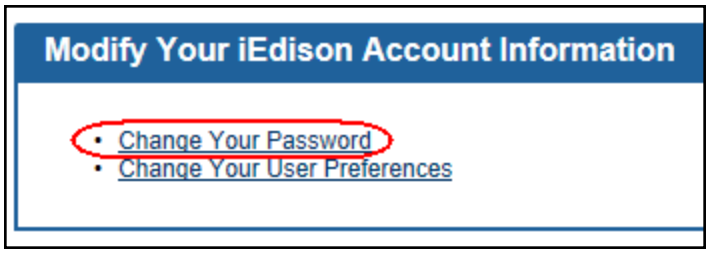
a. *Mandatory*: Enter comments in the comments field to inform the user about this action.
b. Click **Reactivate** to reactivate the account, or click **Close** to cancel.

5. When you click **Reactivate**, the system reactivates the account and displays a confirmation message.
   And the account owner receives an email notification that includes the text you entered in the **Comments** field.

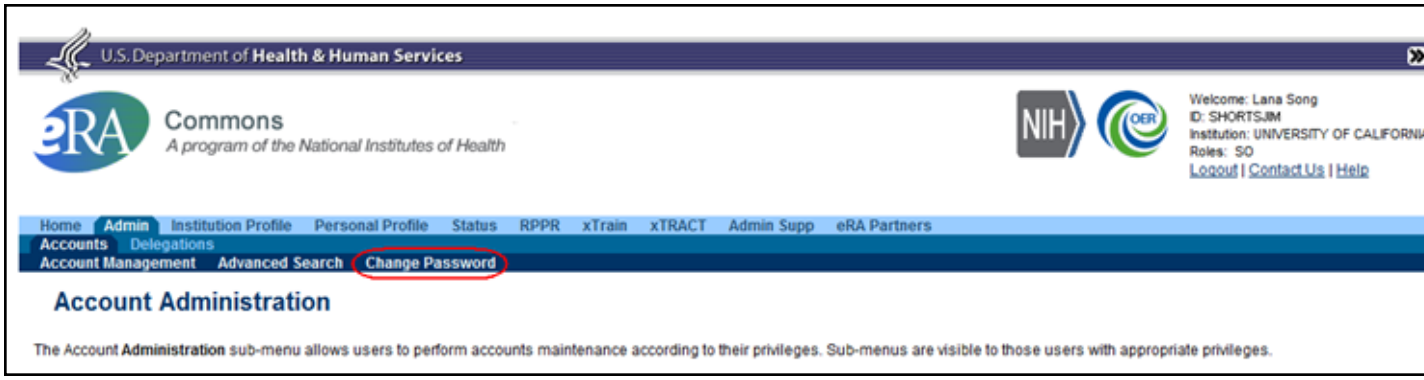
NOTE: The unlock notification asks the user to login to the account that same day. If the user does not login before the end of the day, the account is locked again.

Change Password

1. Perform one of the following options:
   a. For external iEdison users, click the **Change Your Password** hyperlink on the *Main Menu* screen.
   b. For Commons users, click the **Change Password** tab.

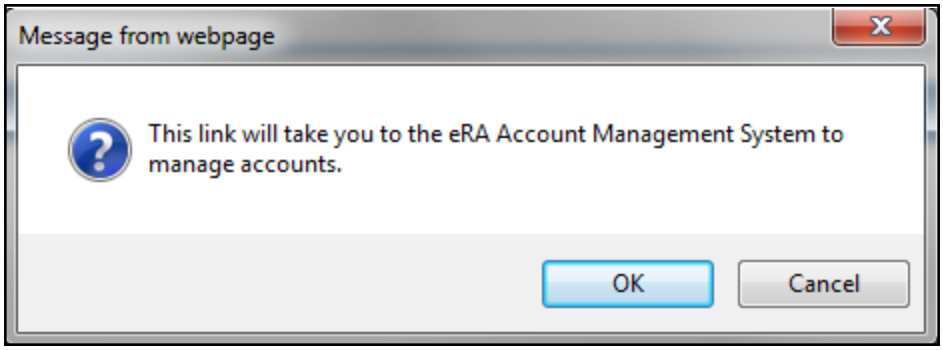


iEdison Main Menu Screen Displaying Change Your Password Hyperlink



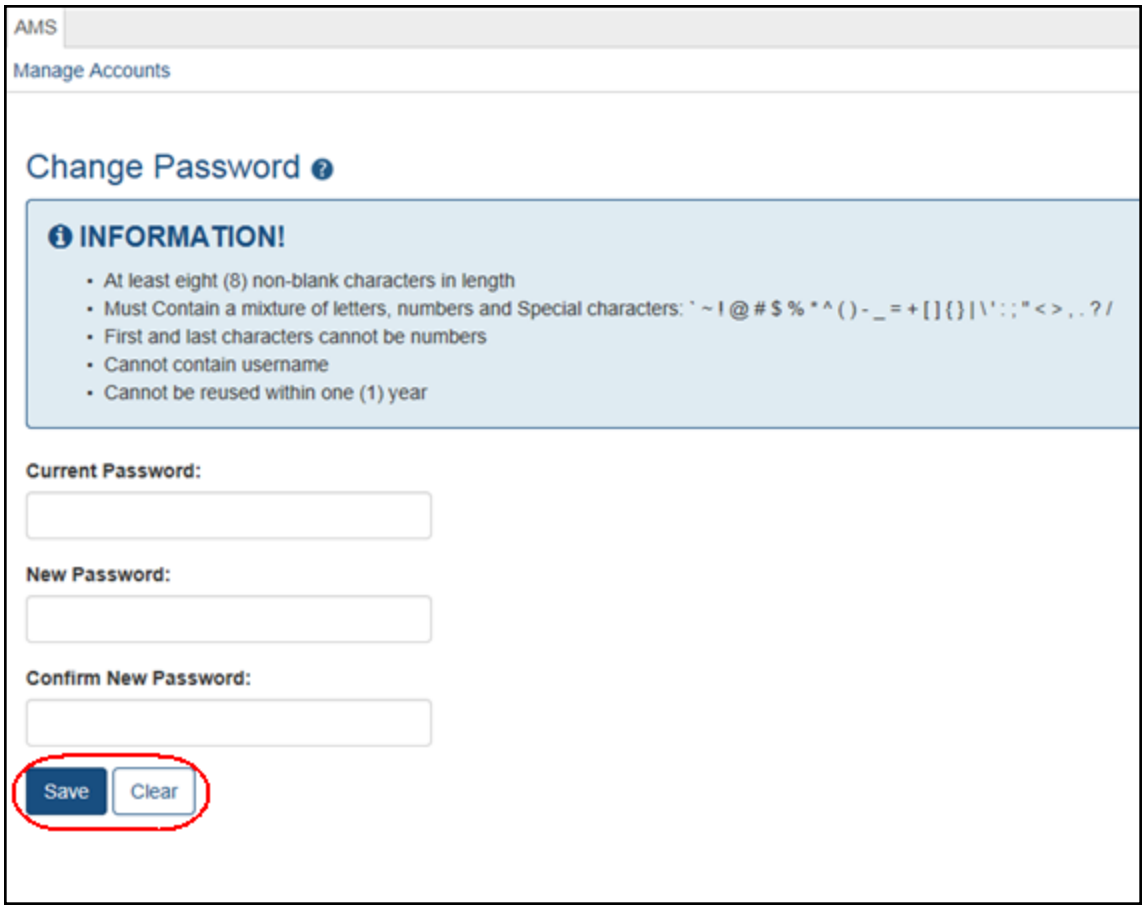
Commons Menu Tabs Displaying the Change Password Tab

For iEdison users, when the **Change Your Password** hyperlink is clicked, a pop-up screen displays.



Accessing AMS Pop-up Screen

When the **OK** button is clicked on the pop-up screen or the **Change Password** tab is clicked, the *Change Password* screen displays in a separate browser window.



Change Password Screen

2. Enter your **Current Password**.
3. Enter a **New Password**.
4. Type your new password a second time in the **Confirm New Password** field.
5. Perform one of the following options:
   a. Click the **Save** button to save the changes.
   b. Click the **Clear** button to clear the fields.

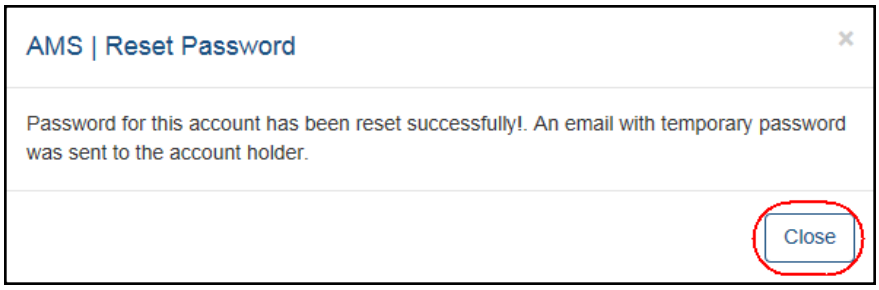
Use your new password the next time that you log into Commons or iEdison.

Reset Password

NOTE: Users are required to reset their passwords after a defined time period. The system locks the account is if the user fails to reset the password. Use this procedure to unlock these accounts.

1. To reset a user's account password, open account in the the *Manage Accounts* screen and click the **Reset Password** button

located on the lower right side of the screen.
2. A pop-up confirmation screen opens. Click **Close** to close it.



3. When you complete the password reset, an email notification with a temporary password is sent to the account holder.

Manage System Accounts

System accounts are used to access eRA Web Services.

Agency, Commons and external iEdison users can manage system accounts in their organizations.

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to the Web Services Certificate (S2S) Guide:

- Section 2.4.3 for Commons users

Perform the following steps:

1. To manage a system account, first perform a search to locate the account.
   a. See Search for System Accounts for more information.
2. On the Search Results screen, click the **Manage** button for the system account you want to manage.

When the **Manage** button is clicked, the *Manage Account* screen opens, as shown below.

Primary Organization

SM - Center for Mental Health Services

Note: Any changes to the account are **not saved** until you hit the save button.
- For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.

All fields are required unless they're marked *(Optional)*

User Information

User Type

System

Primary Organization

SM - Center for Mental Health Services

Certificate Information

Certificate Owner

NQJ4LQL2Z6I9T6NCPH8B

Certificate Provider/Authority CN

RAPIDSSL CA

Certificate Serial Number

NQ:J4:LQ:L2:Z6:I9:T6:NC:PH:8B

Contact Information

Last Name

Voldemort

First Name

Chiblen

Middle Name

Test

Email

Voldy@HaveNoNose.edu

Confirm Email

Voldy@HaveNoNose.edu

Roles

+ Add Roles | + Add Roles to other org.

Showing 1 - 1

Role(s)	Organization(s)	Acti
DOCSERVICE_GET_EADDITTION_SERV	AA - National Institute on Alcohol Abuse and Alcoholism	

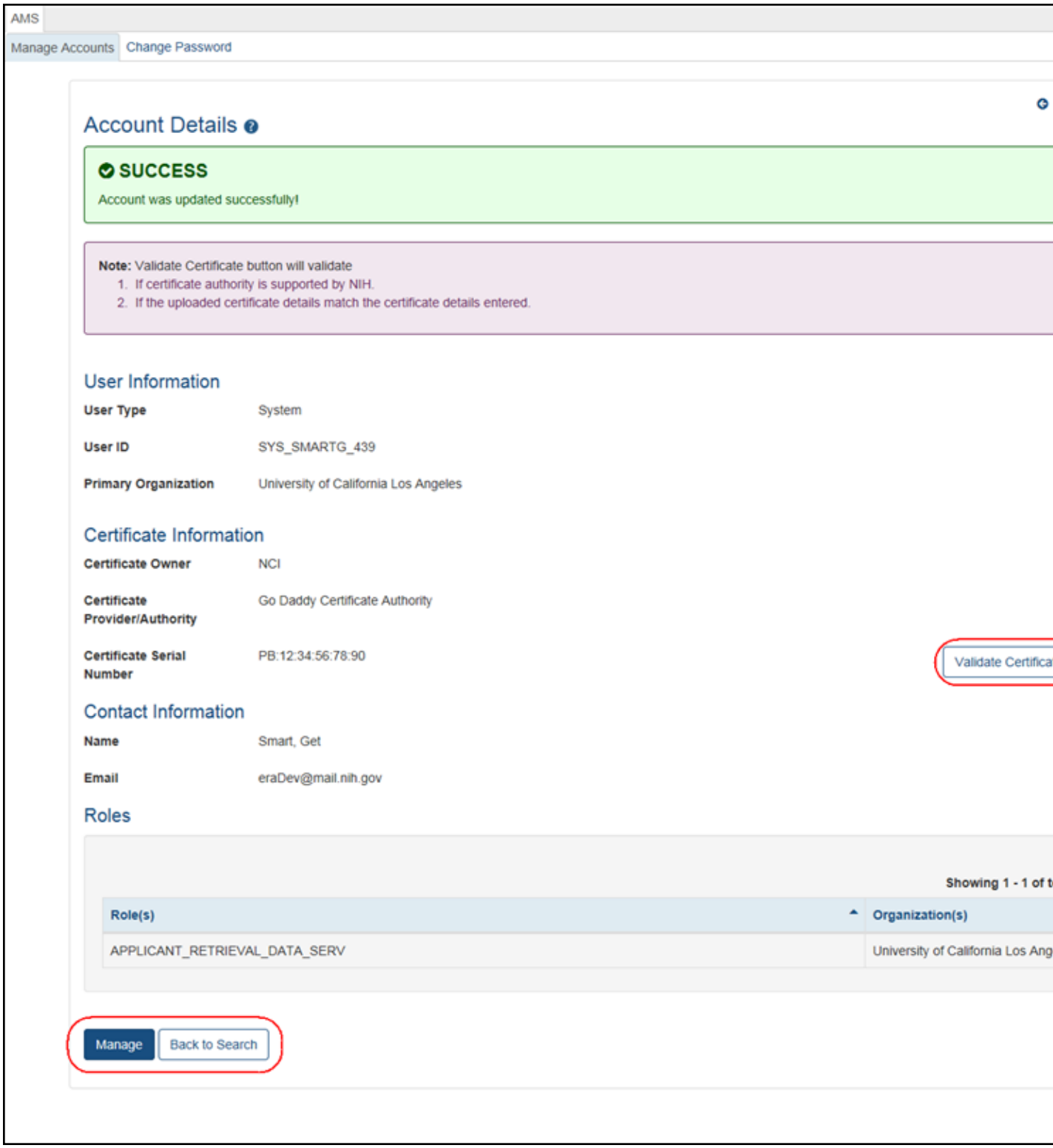
Save | Cancel

Manage Account Screen for external accounts

NOTE: Fields that are grayed out cannot be edited.

3. Edit the non-gray fields as needed.
4. Click the **Add Roles** button to add the roles to the account. See Add System Roles for more information.
5. To remove a role, click the **Remove** button. To remove all roles, click the **Remove All** button.
6. Click **Deactivate** to deactivate an account. See Deactivate Account for more information.
7. Click **Save** to save the changes or lick **Cancel** to cancel.

When you click **Save**, the *Account Details* screen opens and displays a success message, as shown below



Account Details Screen for external users

Account Details Screen for Agency Management Staff

8. You can perform these additional actions in the *Account Details* screen:
    - If the certificate needs to be validated, click the **Validate Certificate** button. See Validate Certificate for more information.
    - To return to the *Manage Accounts* screen, click the **Manage** button or the **Go Back** hyperlink.
    - To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

Add System Roles

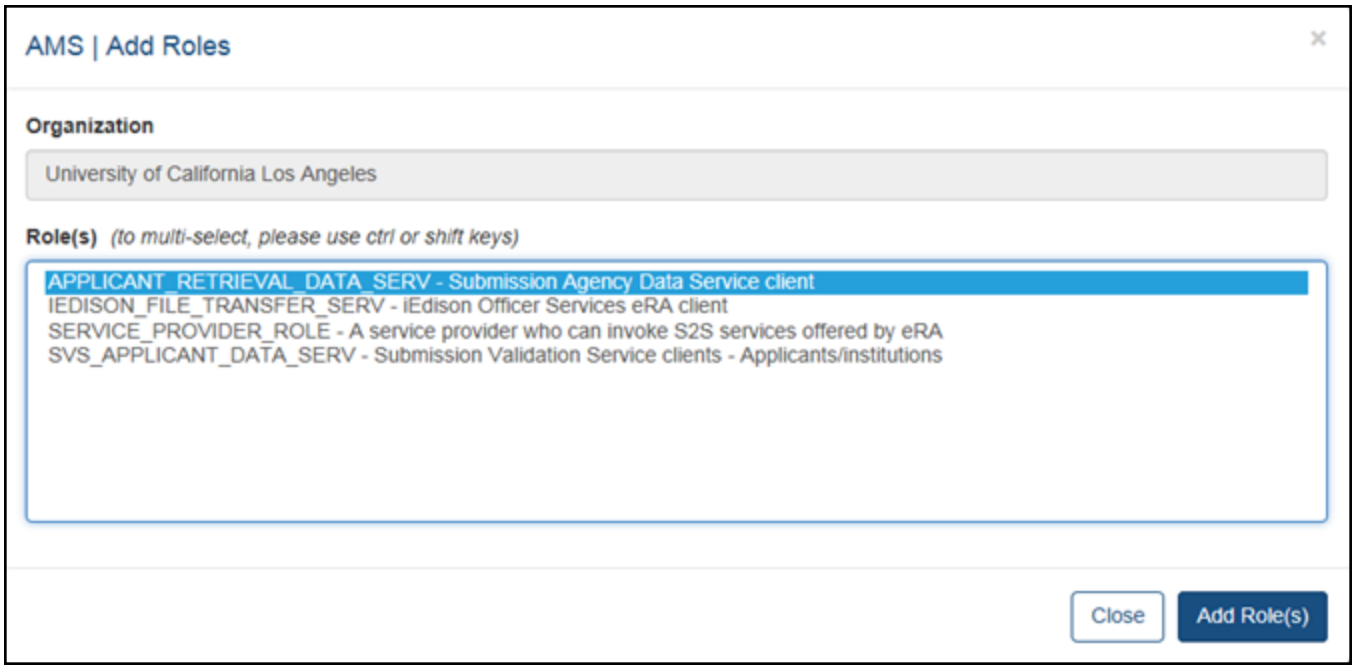
NOTE: The list of roles is dependent on the logged-in user's role.

1. To add system roles to the account, click on the **+ Add Roles** button on the *Create Accounts* screen.

Add Roles Button on the Create Account Screen

When the **+ Add Roles** button is clicked, the pop-up *Add Roles* screen displays.

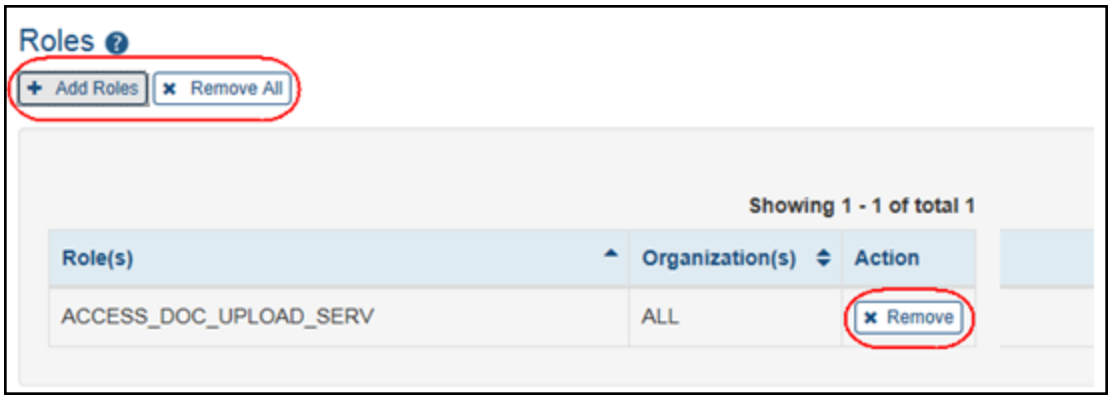
External System Roles



Add Roles Screen for External System Roles

1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

When the **Add Roles(s)** button is clicked, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).



Roles Section on the Create Accounts Screen for Agency Users

3. To add additional roles, click the **+ Add Roles(s)** button. Repeat the steps above.

4. To remove a role click the appropriate **Remove** button in the **Action** column.
5. To remove all roles click the **Remove All** button.

User Reports

AMS includes the following reports capabilities:

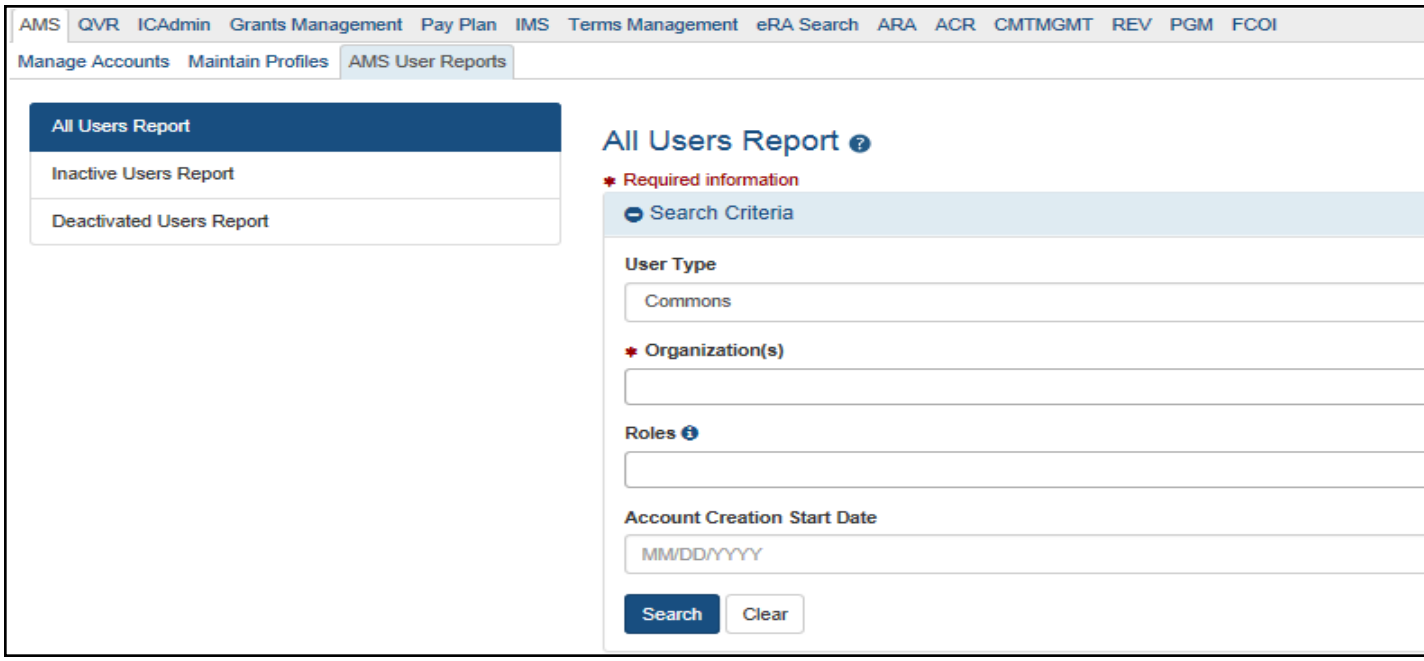
- **All Users Report** — Information on all user accounts in your organization
- **Inactive Users Report** — lists user accounts that have been locked due to inactivity (**note**: for internal users only)
- **Deactivated Users Report** — lists user accounts that have been deactivated by an administrator (**note**: for internal users only)
- **Role Description Report** — lists all roles, role descriptions, and associated privileges for any business area (**note**: for internal users only)

To open the reporting functions, click the **AMS User Reports** tab.

The *All Users Report* screen opens. There are two versions of this screen, as shown below. The version you see depends on the organization you belong to.

All Users Report Screen for External Users

All Users Report screen for Commons, external iEdison, and State Department users

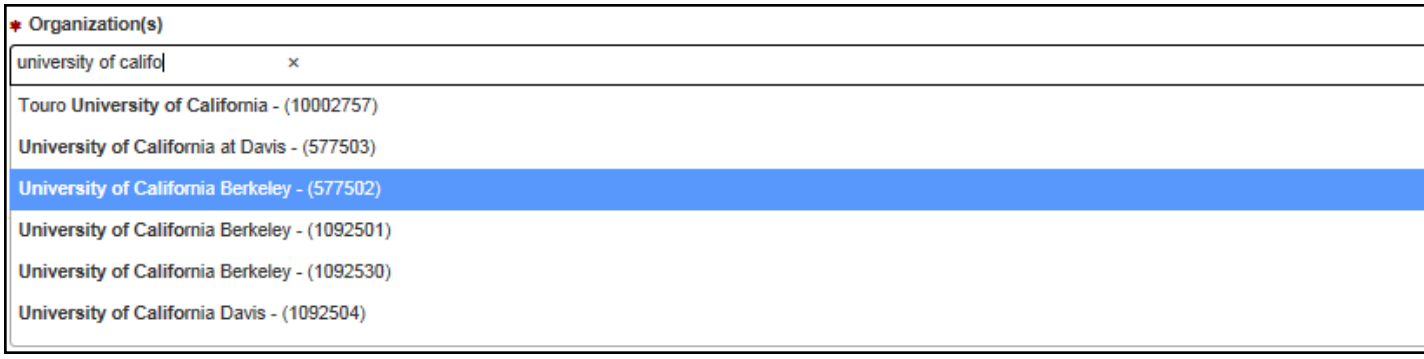


All Users Report Screen for External Users

Use this screen to run an All Users Report on external users.

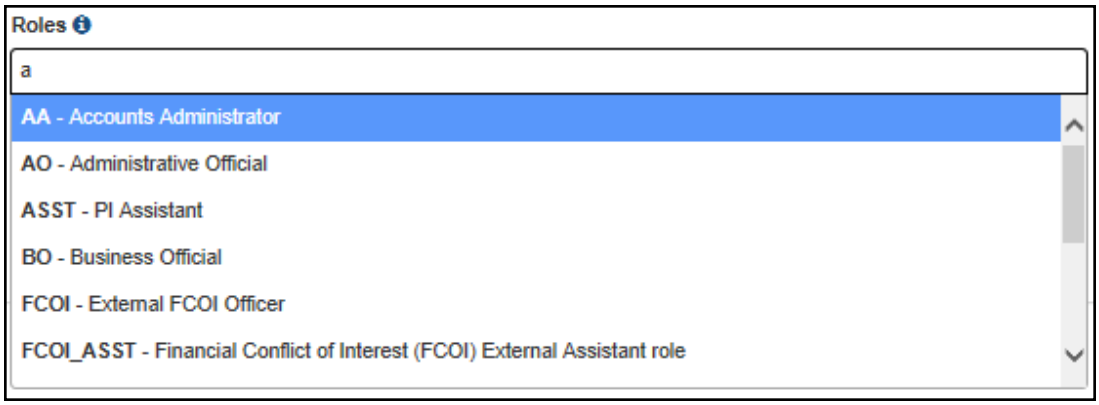
The **All Users Report** button is selected by default, as shown below. Follow the steps below to launch the report.

1. Select "Commons" in the **User Type** field and set the search criteria in the other fields as follows:
2. **Organization** — This field displays your organization name. Service Desk agents, to select an organization, begin typing its name or ID number in this field. The live search function displays organization names as you type. When the one you want appears, scroll down and click to select it, as shown below. (**note**: To select multiple organizations, hold the <Ctrl> key as you click.) **Note:** This field is mandatory.



Organization field, external

3. **Roles** — Leave this field blank to report all user roles. To limit the report to one or more user roles, click this field to open the drop-down menu or begin typing the name of a role. The live search function displays roles as you type. When the one you want appears, scroll down and click to select it, as shown below. (**Note**: To select multiple roles, hold the <Ctrl> key as you click.)



4. **Account Creation Start Date/End Date** — Leave these fields blank to report all time periods. To limit the report to a certain time period, enter a start date, end date, or start and end dates. Enter dates in MM/DD/YYYY format or click the calendar icon to select them from the calendar.
5. When you finish entering search criteria, click **Search** to run the report. See Report Output below.

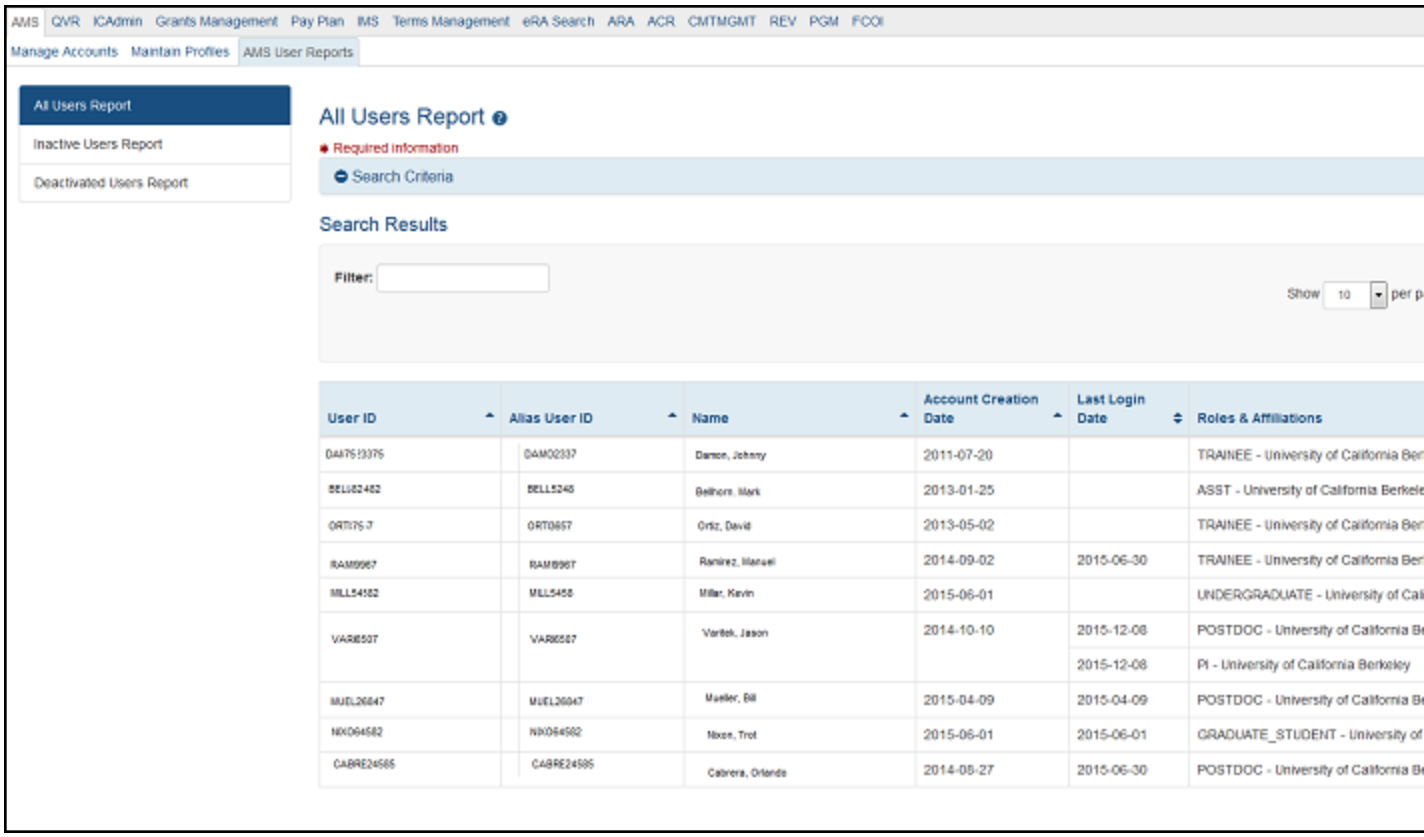
Organization field, internal

Role Description Report

Report Output

All Users Report output

To run the All Users report, click the **All Users report** button and enter search criteria as described above. When you click the **Search** button for the All Users report, the report output displays.



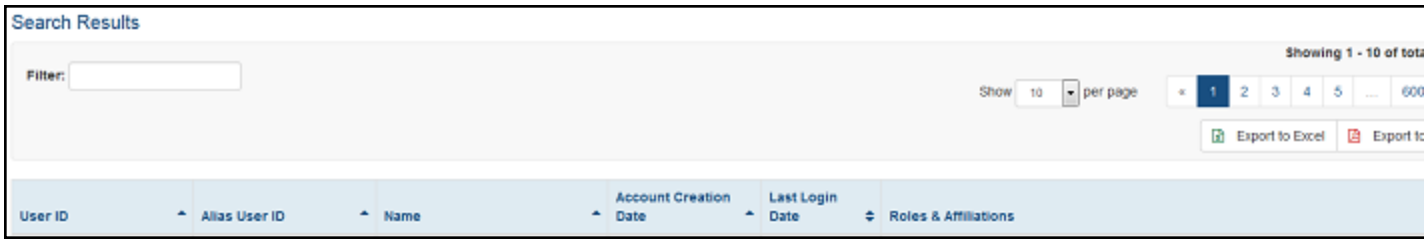
All Users Report output

Role Description Report output

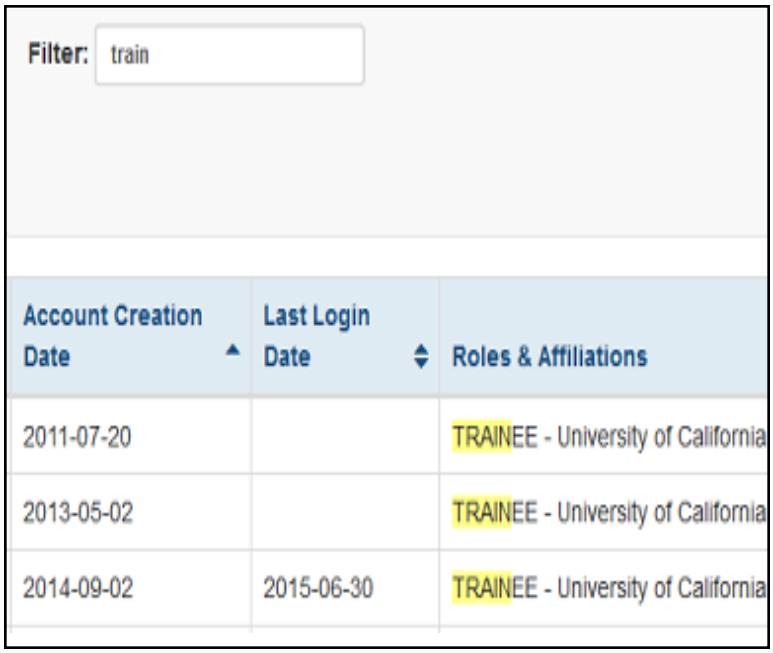
Navigating the report output

These tips for browsing, filtering and exporting the report output apply to all report types.

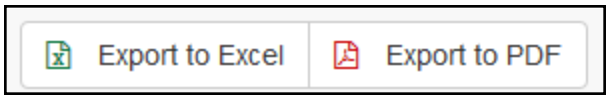
The report output displays include the controls shown here.



- To filter the report, type some text in the **Filter** field, such as a name. Only rows that contain the filter term will be displayed, and all instances of the filter text will be highlighted in yellow, as shown below:



- To adjust the number of records displayed, select a number in the **Show per page** drop-down menu.
- To navigate the report pages, click a **Page Number** or use the left and right arrow buttons.
- To re-sort the report columns in ascending or descending order, click the up/down arrows in the column headers.
- To export the report output as an Excel spreadsheet or PDF, click the appropriate **Export** button, shown here:



- **Export to Excel**

When you click this button, an open-or-save dialog opens, as shown here.

Click **Open** to open the report data in Excel. A new Excel window opens Go to it and click the **Enable Editing** button in the yellow bar at the top of the worksheet, then work with the spreadsheet as usual.

- **Export to PDF**

Click this button to save the report as a PDF file. A save dialog opens. Choose a location and save the file.