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Office of Extramural Research

Account Management System (AMS) User Guide

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CONTACT US

Document Comments:

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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)

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.

DOCUMENT HISTORY

Date	System Version	Document Version	Description of Change	Author
1/22/2016	1.0.0.0	1.0.0	Created brand new user guide from online help files	eRA Communications

The most current version of this document will be available on the eRA website: http://era.nih.gov.

IMPORTANT: Did you know the information in this user guide is available as online help, too? Access the New AMS Online Help directly at http://era.nih.gov/erahelp/AMS_NEW or click the '?' icon anywhere within AMS for help specific to that screen.

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1 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.

Authorized users can:

- Create new user or system account(s) with an associated password.
    - The Username and password must comply with Standard eRA policy guidelines.
    - All temporary passwords are system generated.
- Manage an existing user or system account
- Manage role(s) on the user or system account
- Affiliate an account with an Organization, Agency, or Institute/Center (IC)
- Reset passwords on existing accounts (external users only)
    - **NOTE**: All passwords are system generated.

1.1 Agency Management Staff

Agencies, IC Coordinators, and the eRA Service Desk have the ability to search, create, maintain, and view **user** and **system** accounts for their Agency or IC. For IC Coordinators there is also the ability to assign Initial Review Group (IRG) clusters to an account.

1.2 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.

1.3 iEdison Management Staff

The external iEdison management staff have the ability to search, create, maintain, and view **user** and **system** accounts for their organization. The iEdison Agency and ERL staff have the ability to search, create, maintain, and view **user** accounts only for their organization.

1.4 State Department Staff

The State Department staff have the ability to search, create, maintain, and view **user** accounts only.

2 Accessing AMS

2.1 Agency Management Staff

2.1.0.1 External Agency Management Staff

The Account Management System (AMS) is access via the eRA extranet.

1. To access the AMS *Login* screen click here.

The Commons *Login* screen is displayed.

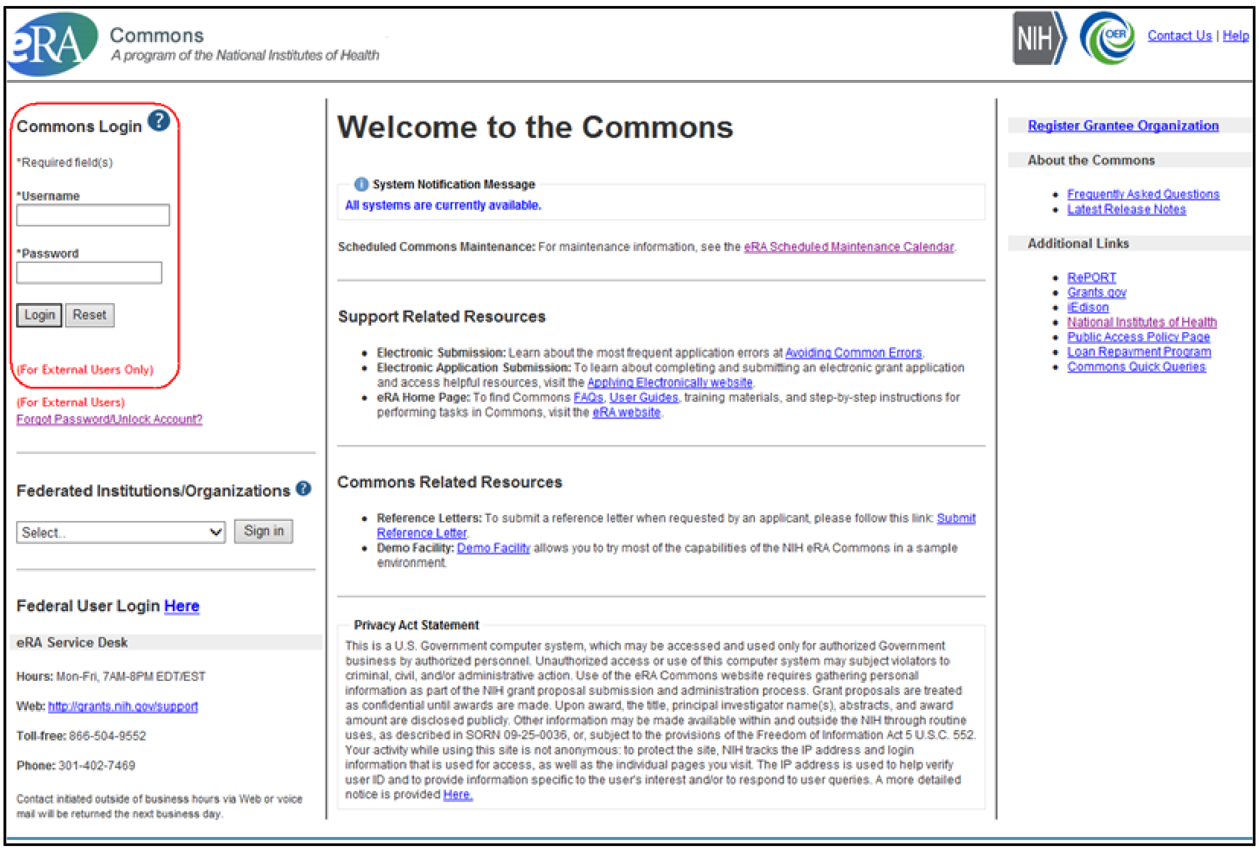

Figure 1: Commons Login Screen

1. Enter your **Username** and **Password**.
2. Click the **Login** button.

After successfully logging into the AMS, the system displays *Search Accounts* screen.

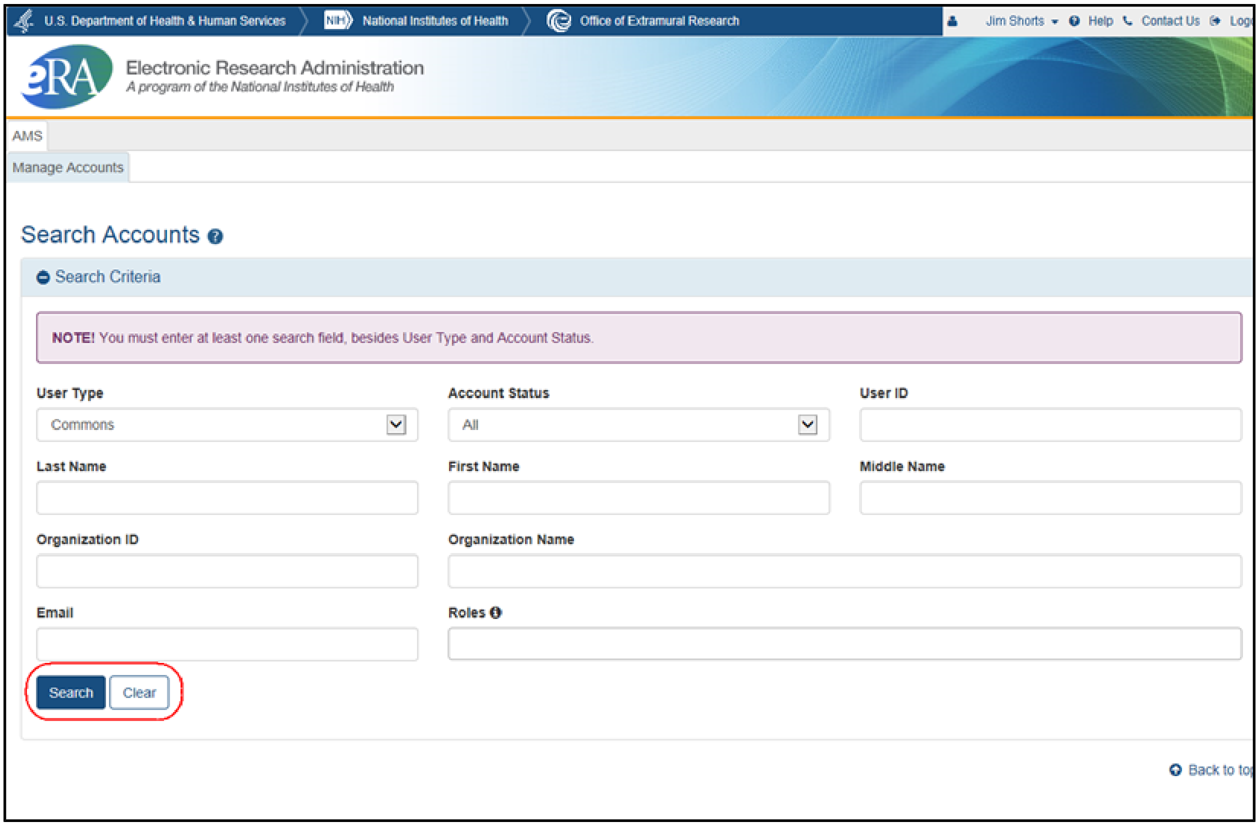

Figure 2: Search Accounts Screen for External Agency Users

For more information on performing a search, please see the Search Account topic.

2.1.0.2 Internal Agency Management Staff

The Account Management System (AMS) is access via the eRA Intranet.

1. Locate the Account Management System (AMS) on the *Home* screen under the heading **Modules, User Guides & Documentation**.
2. Click the + sign below the AMS name to expand the menu.
3. Click on the **Quick Launch** hyperlink.

When the **Quick Launch** hyperlink is clicked, the NIH *Login* screen is displayed.

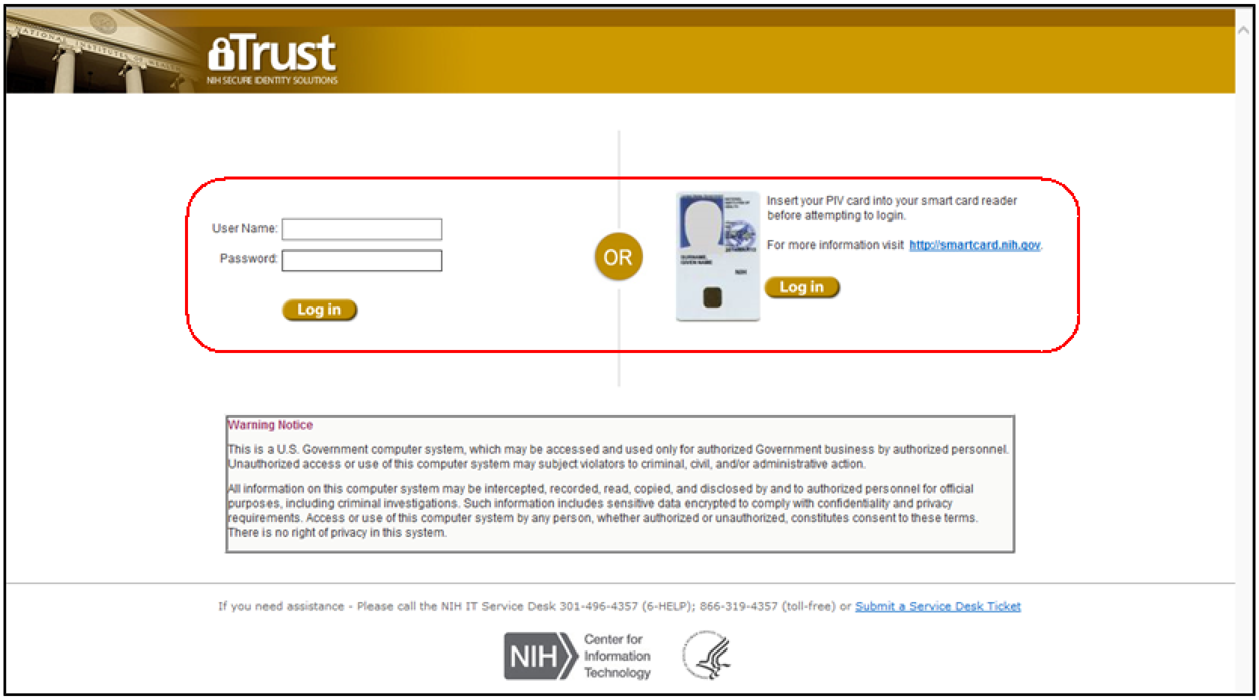

Figure 3: NIH Login Screen

4. Complete the Login process.
    a. Enter in your NIH **User Name:** (ID) and **Password:** OR ...
    b. Use your Smart Card and enter your Personal Identification Number (PIN) number.
5. Click the **Log in** button.

After successfully logging into the AMS, the system displays *Search Accounts* screen.

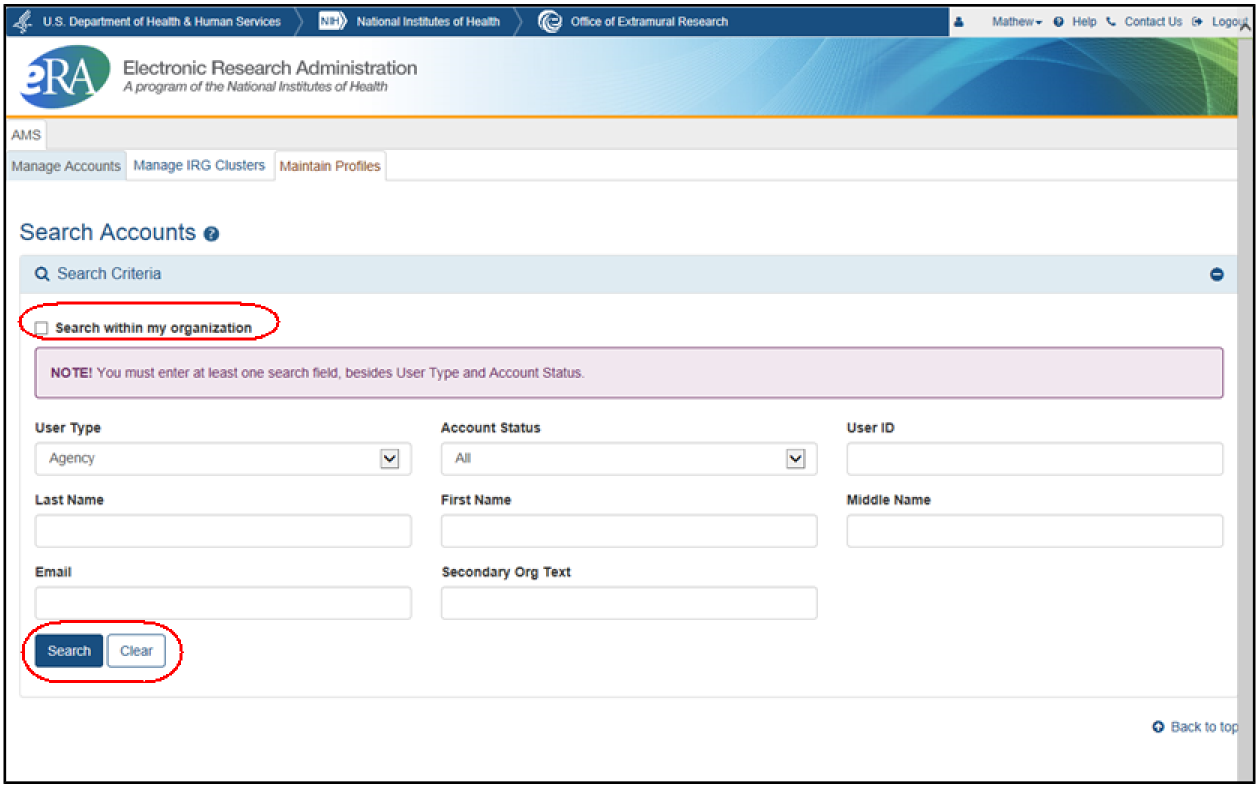

Figure 4: Search Accounts Screen for Internal Agency Users

For more information on performing a search, please see the Search Account topic.

For more information on managing IRG Clusters, please see the Manage IRG Clusters topic.

2.2 Commons Management Staff

After logging into Commons, AMS is accessed from the **Admin** --> **Accounts** --> **Account Management** sub-menu tab.

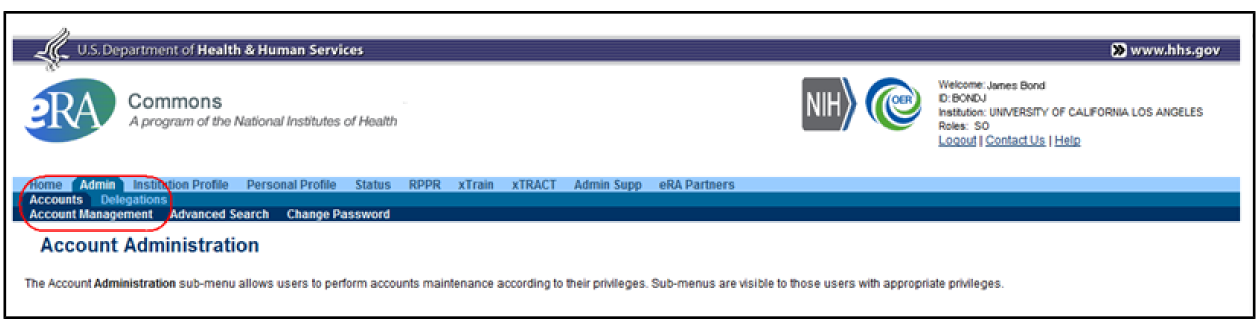

Figure 5: Commons Menu Tabs

When the **Account Management** tab is clicked, the system displays the *Search Accounts* screen (default screen) .

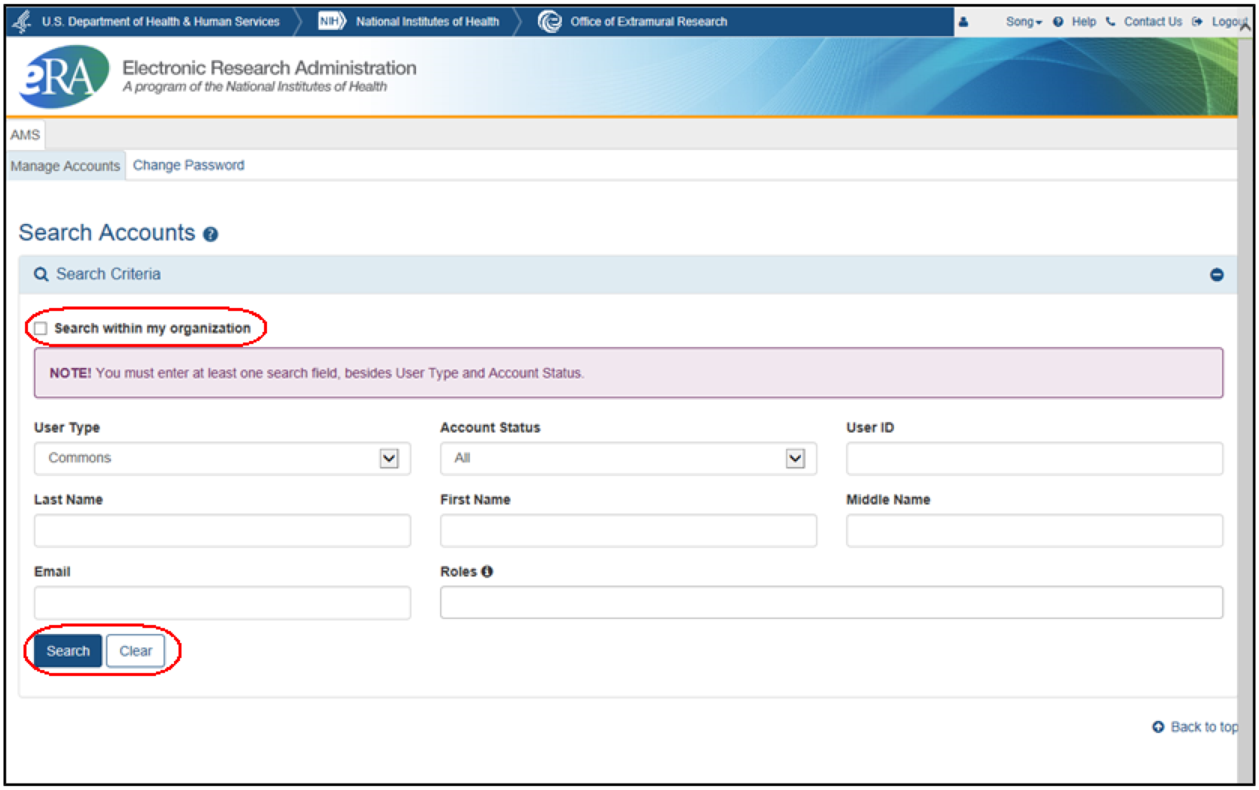

Figure 6: Search Accounts Screen for External Commons Users

For more information on performing a search, please see the Search Account topic.

2.3 iEdison Management Staff

AMS can be accessed via the iEdison *Main Menu* or the ERL *Main Menu* screen.

NOTE: It is best to search for an account first to verify that it exists before attempting to create a new account. AMS can also be accessed via the **Create an iEdison Account** hyperlink.

External and Agency iEdison Users

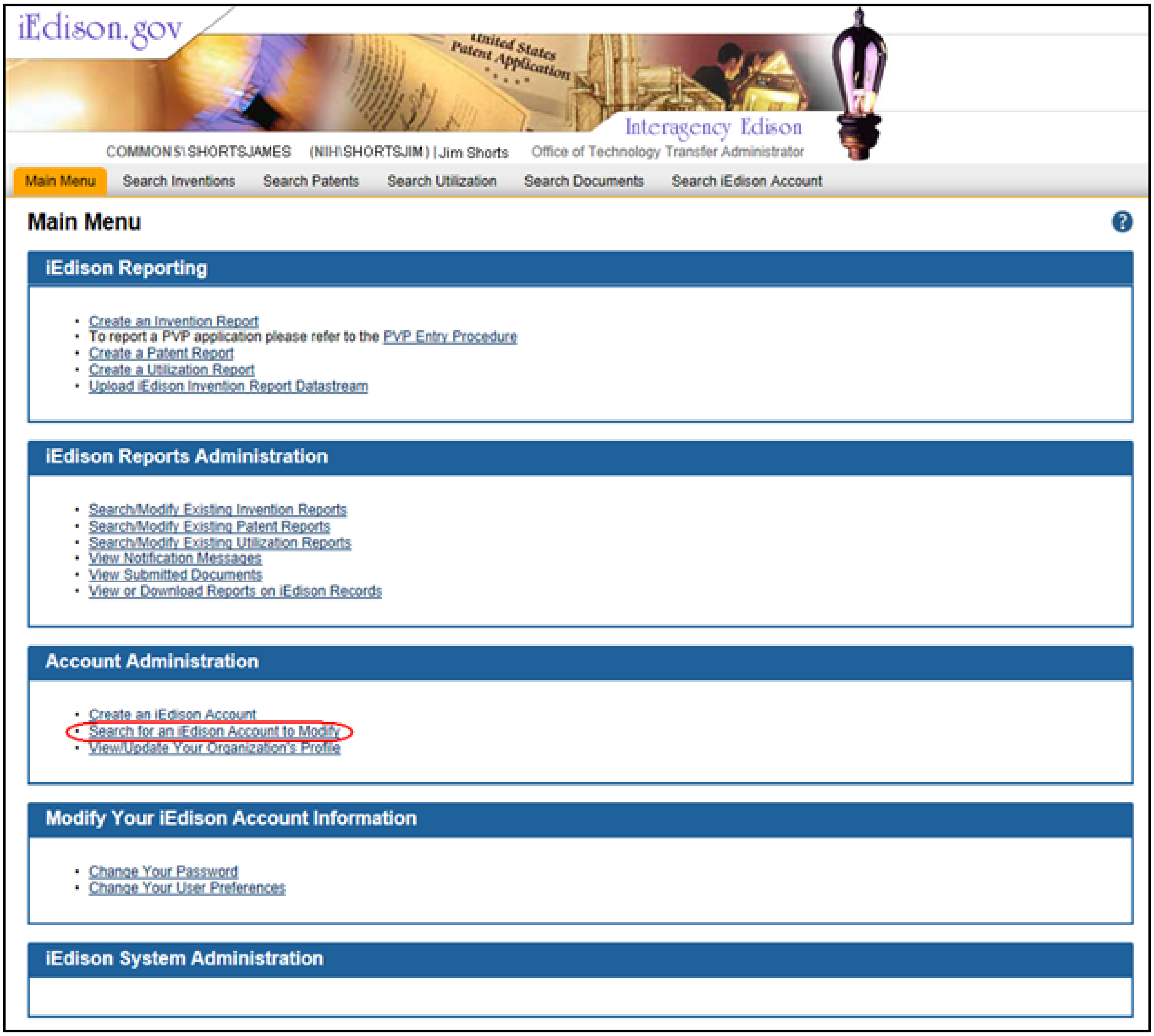

Figure 7: iEdison Main Menu Screen for External and Agency Users

iEdison ERL Users

Figure 8: iEdison Main Menu Screen for ERL Users

1. Click the **Search for an iEdison Account to Modify** hyperlink on the *Main Menu* screen.

When the **Search for an iEdison Account to Modify** hyperlink is clicked, a pop-up screen displays.

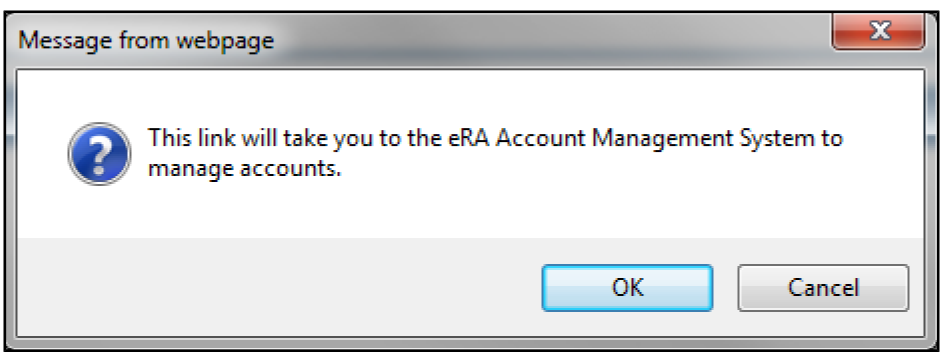

Figure 9: Accessing AMS Pop-up Screen

When the **OK** button is clicked, the *Search Accounts* screen displays.

External iEdison Users

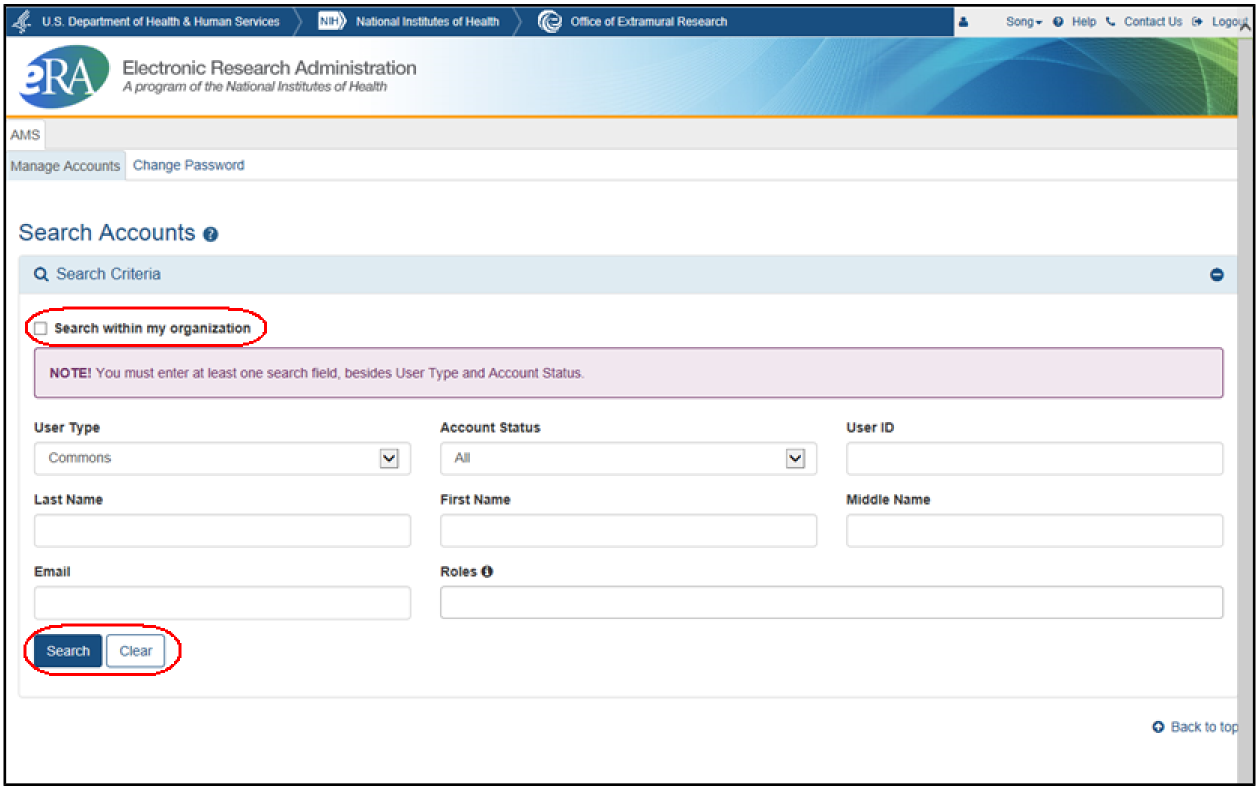

Figure 10: Search Accounts Screen for External and Agency iEdison Users

iEdison Agency and ERL Users

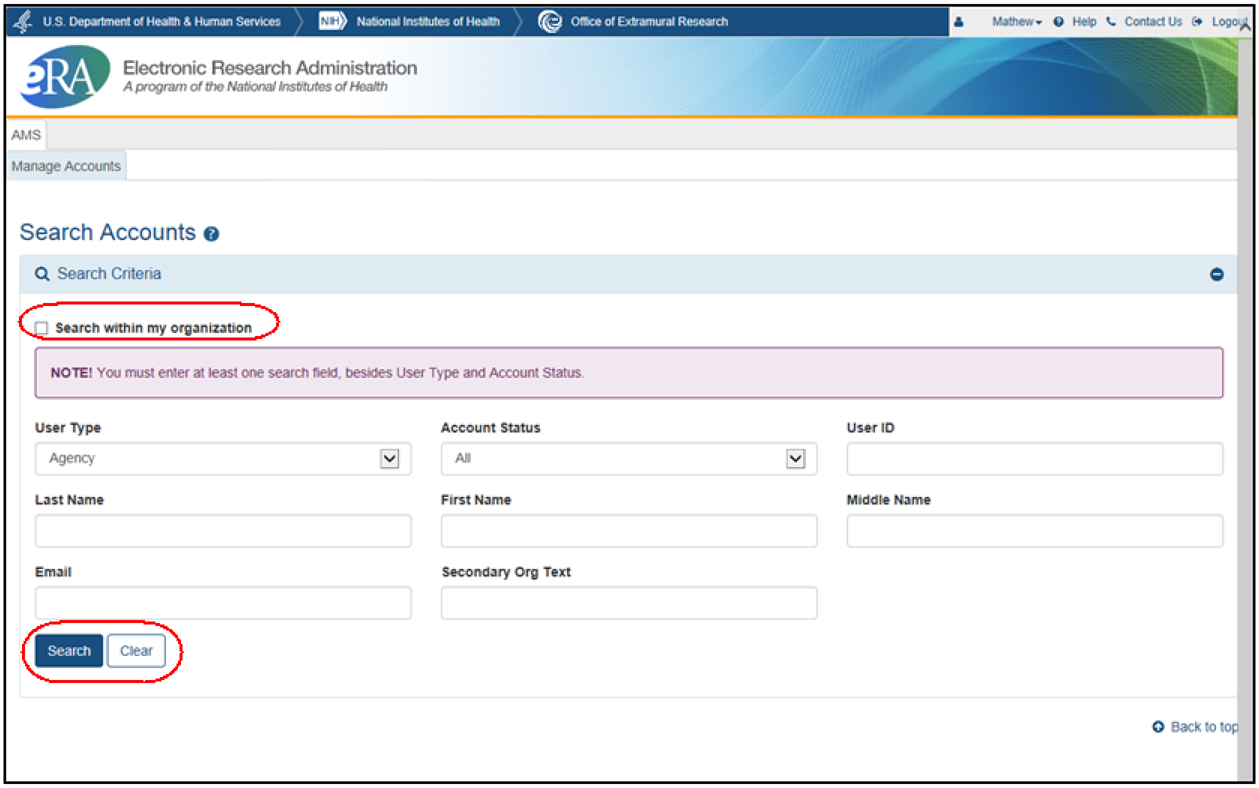

Figure 11: Search Accounts Screen for iEdison ERL Users

For more information on performing a search, please refer to the Search Account topic.

2.4 State Department Staff

1. To access AMS click here.

The system navigates to the Commons *Login* screen.

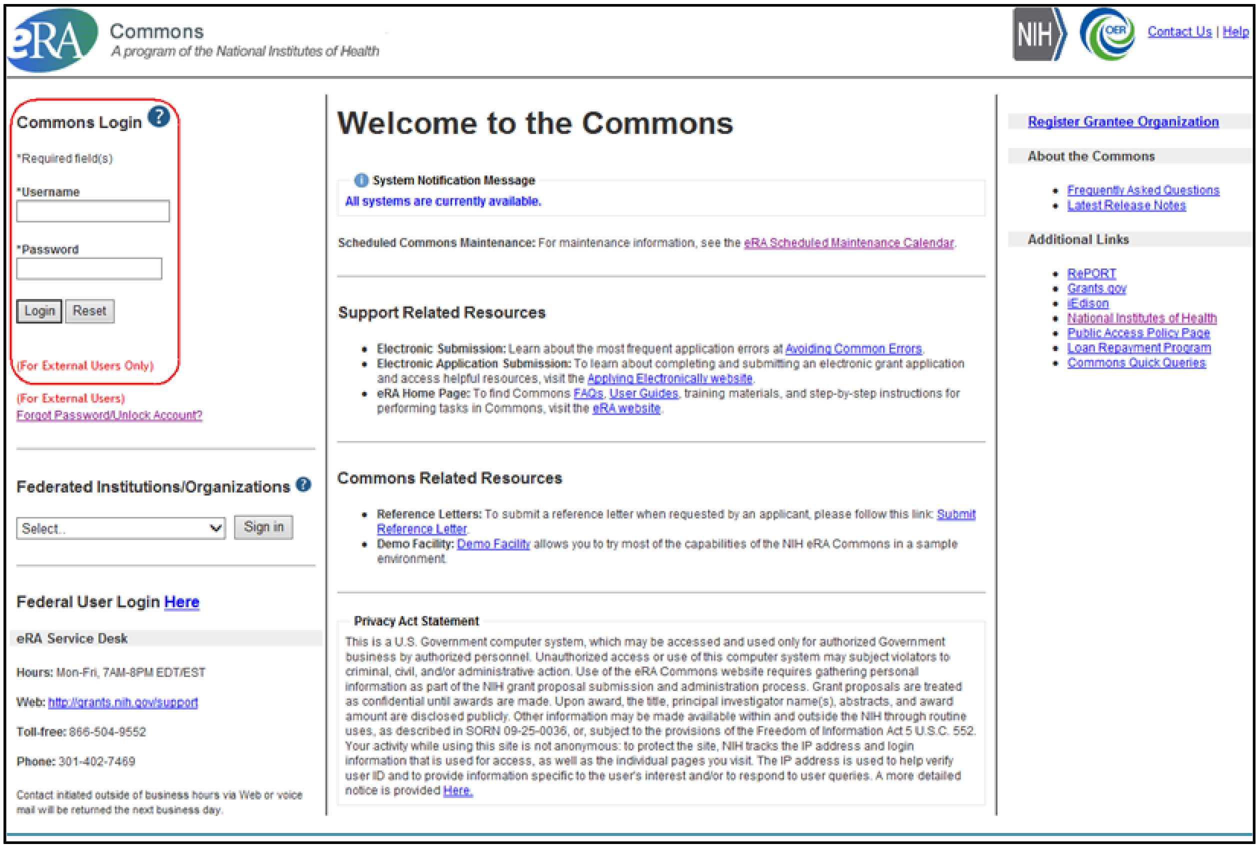

Figure 12: Login Screen for State Department Users

2. Enter your **User Name** and **Password**.
3. Click the **Login** button.

Upon successful log in the default *Search Accounts* screen displays.

NOTE: The only **User Type** is *State*.

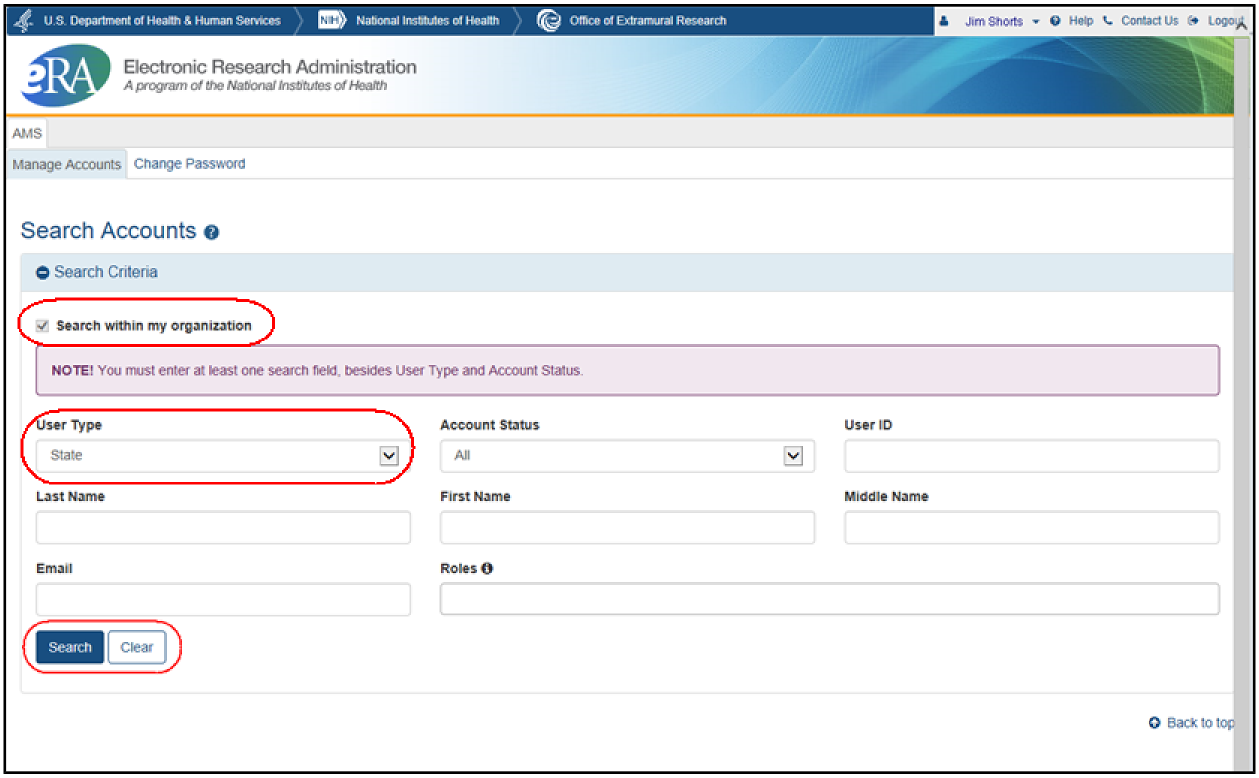

Figure 13: Search Accounts Screen for State Department Users

For more information on performing a search, please refer to the Search Account topic.

3 User Roles

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

3.1 Agency iEdison Management Staff

- iEdison Agency Administrator
- IDO Administrator
- NIH Accounts Administrator
- PO Administrator
- GMS/CMS Administrator

3.2 Agency Management Staff

- Agency Staff
- eRA Service Desk Administrators
- Institute/Center (IC) Coordinators

3.3 Commons Management Staff

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

3.4 iEdison Management Staff

- Extramural Technology Transfer Office Administrator (Extramural TTO Admin)

3.5 State Department

- FACTS State Department Clearance Manager (FACTS SDC MGR role)

4 Search Account

4.1 User Accounts

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

There are various account statuses:

- *Active* - A working user account with a role (s) for the appropriate system exists with a user profile.
- *Pending* - An Agency or Commons account owner that has not validated the account request or Data Quality needs to approve the account request
- *Pending Affiliation* - An active account not associated with an institution, organization, or a country
- *Profile Only* - The user profile is not associated with a Commons account

To search for an account, please refer to one of the following topics:

- Search for Agency User Accounts
- Search for Commons User Accounts
- Search for iEdison User Accounts
- Search for State Department User Accounts

4.2 System Accounts

Searching for system accounts can be performed by Commons, Agency, and external iEdison users. For more information on searching for system accounts, please click the appropriate hyperlink.

- Search for System Accounts

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

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

4.3 Search for User Accounts

4.3.1 Search for Agency or iEdison Agency/ERL User Accounts

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

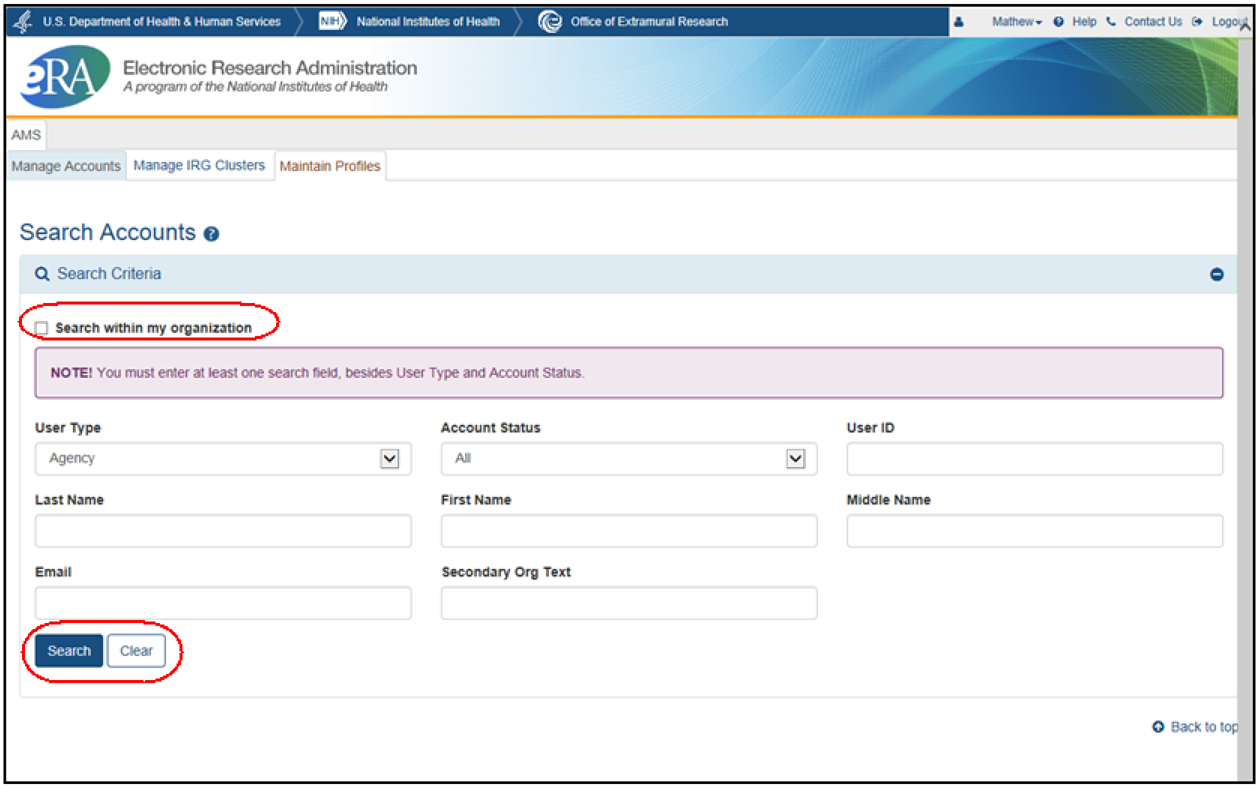

Figure 14: Search Accounts Screen for Agency Users

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. Perform one of the following options:
    a. Click the **Search** button to execute the search.
        i. Please refer to the Agency and iEdison Agency/ERL User Account Search Results topic.
    b. Click the **Clear** button to clear the search criteria.

If a user has appropriate privileges to work with system accounts and the **User Type** selected is *System*, then the **Search within my organization** check box is automatically checked. For more information please refer to the Search for System Accounts topic.

For information on Search Account error messages, please refer to the Error Messages topic.

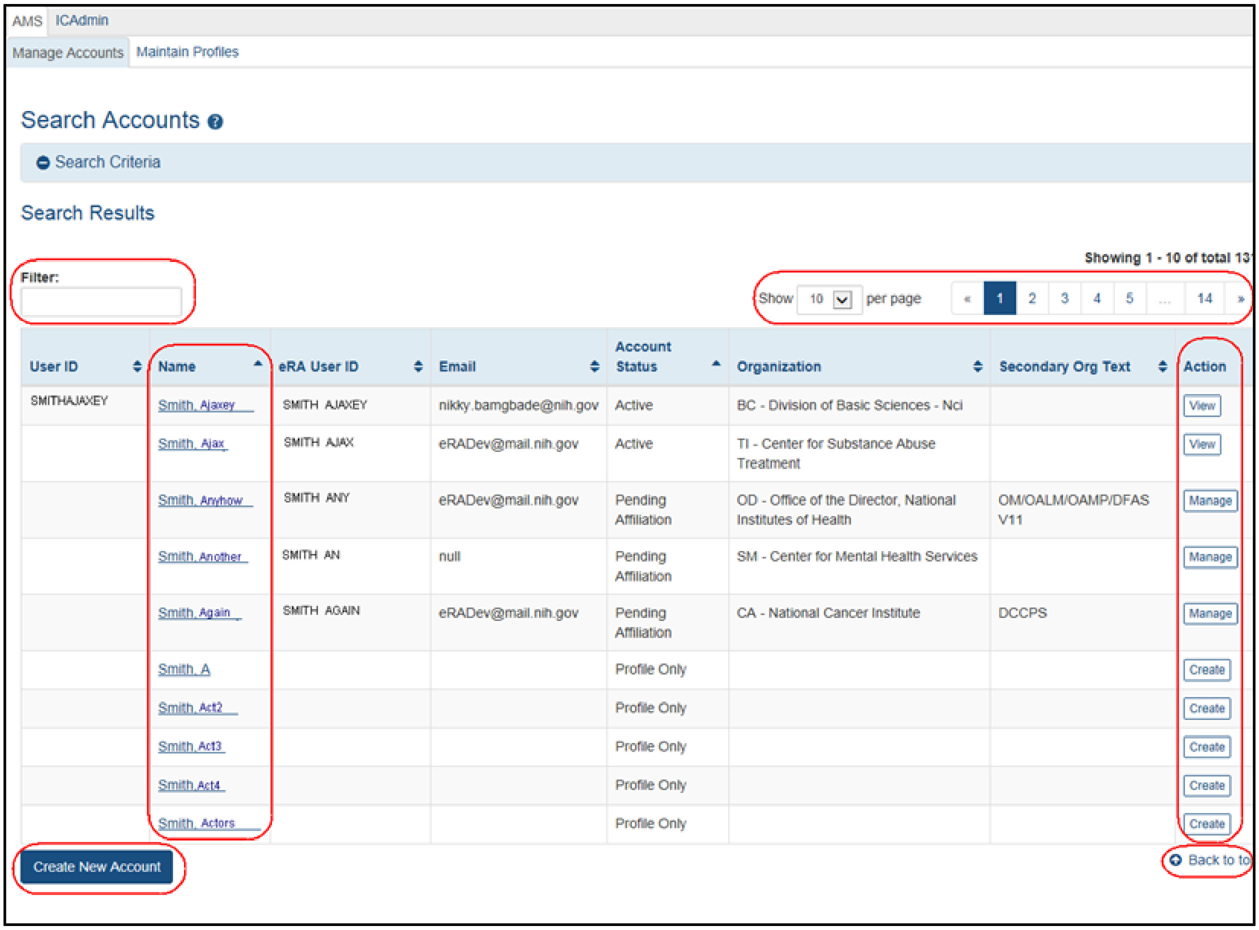
4.3.1.1 Agency and iEdison Agency/ERL User Account Search Results

When the **Search** button is clicked, the system displays appropriate 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
- **eRA User ID** - IMPAC II user ID
- **Email**
- **Account Status**
  - *Active* - The **View** button displays and the **Manage** button displays for the appropriate record per the logged in user's IC in the **Action** column.
  - *Pending Affiliation* - The **View** button displays and the **Manage** button displays for the appropriate record per the logged in user's IC in the **Action** column.
  - *Profile Only* - The **Create** button displays in the **Action** column.
- **Organization**
- **Secondary Org Text**
- **Action** - Option buttons are **Manage**, **View**, and **Create**.



User ID	Name	eRA User ID	Email	Account Status	Organization	Secondary Org Text	Action
SMITHAJAXEY	Smith, Ajaxey	SMITH AJAXEY	nikky.bamgbade@nih.gov	Active	BC - Division of Basic Sciences - Nci		View
	Smith, Ajax	SMITH AJAX	eRADev@mail.nih.gov	Active	TI - Center for Substance Abuse Treatment		View
	Smith, Anyhow	SMITH ANY	eRADev@mail.nih.gov	Pending Affiliation	OD - Office of the Director, National Institutes of Health	OM/OALM/OAMP/DFAS V11	Manage
	Smith, Another	SMITH AN	null	Pending Affiliation	SM - Center for Mental Health Services		Manage
	Smith, Again	SMITH AGAIN	eRADev@mail.nih.gov	Pending Affiliation	CA - National Cancer Institute	DCCPS	Manage
	Smith, A			Profile Only			Create
	Smith, Act2			Profile Only			Create
	Smith, Act3			Profile Only			Create
	Smith, Act4			Profile Only			Create
	Smith, Actors			Profile Only			Create

Figure 15: 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:** text box and hit the **<Enter>** key.
    a. For example, to view all users with the Secondary Org Text of DCCPS, type *DCCPS* in the **Filter:** 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 *Person Administration* screen, select the appropriate name hyperlink in the **Name** column.
    a. For more information, please see the Person Administration topic in the Person Search online help.
7. To perform one of the options in the **Action** column, please refer to the Actions Options topic.
8. 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 Account topic.
9. To return to the top of the screen, click the **Back to top** hyperlink.

For information on Search Account error messages, please refer to the Error Messages topic.

4.3.2 Search for Commons User Accounts

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

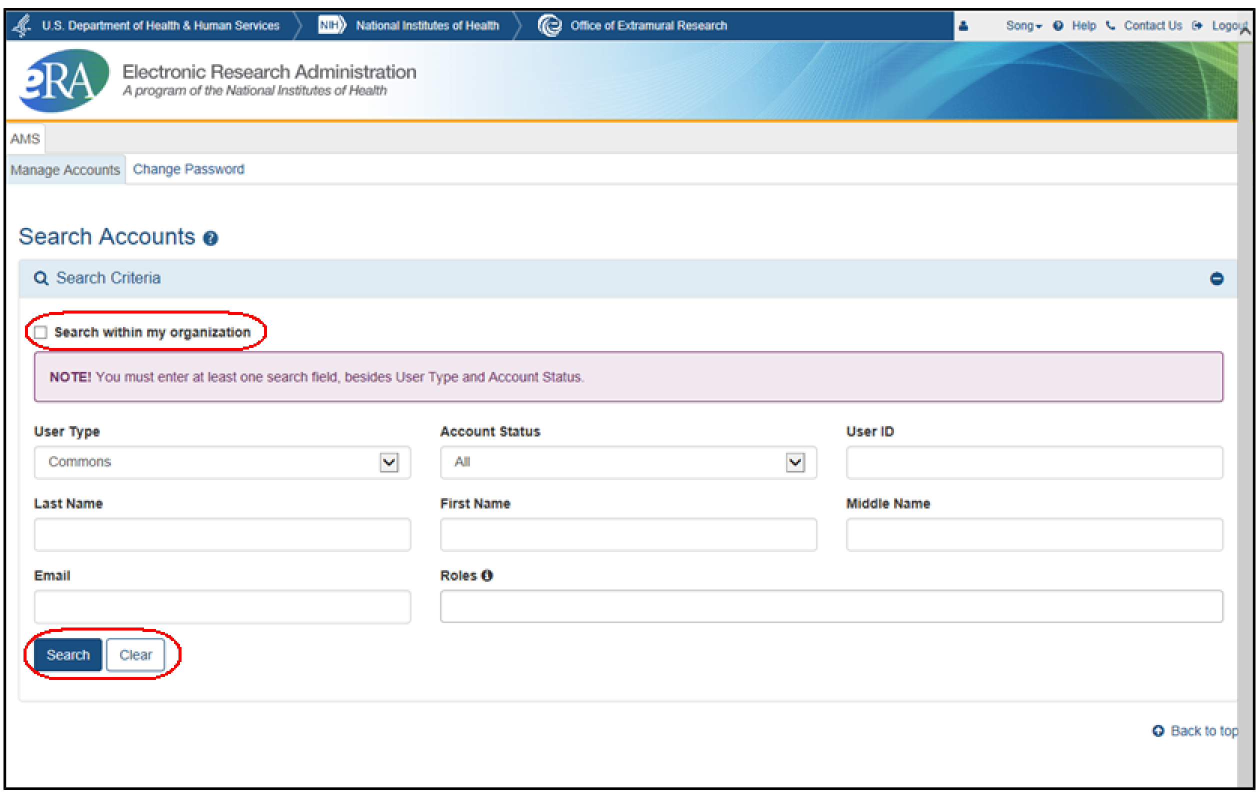

Figure 16: Search Accounts Screen for External Users

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.

1. Enter the appropriate search criteria in at least one of the other search fields.
2. If appropriate, select the appropriate Role.
    a. To select multiple roles, hold the **<Ctrl>** key and highlight the appropriate 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.

3. Perform one of the following options:
    a. Click the **Search** button to execute the search.
        i. Please refer to the Commons User Account Search Results topic.
    b. Click the **Clear** button to clear the search criteria.

If a user has appropriate privileges to work with system accounts and the **User Type** selected is *System*, then the **Search within my organization** check box is automatically checked. For more information please refer to the Search for System Accounts topic.

For information on Search Account error messages, please refer to the Error Messages topic.

4.3.2.1 Commons User Account Search Results

When the **Search** button is clicked, the system displays appropriate user 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
- **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.

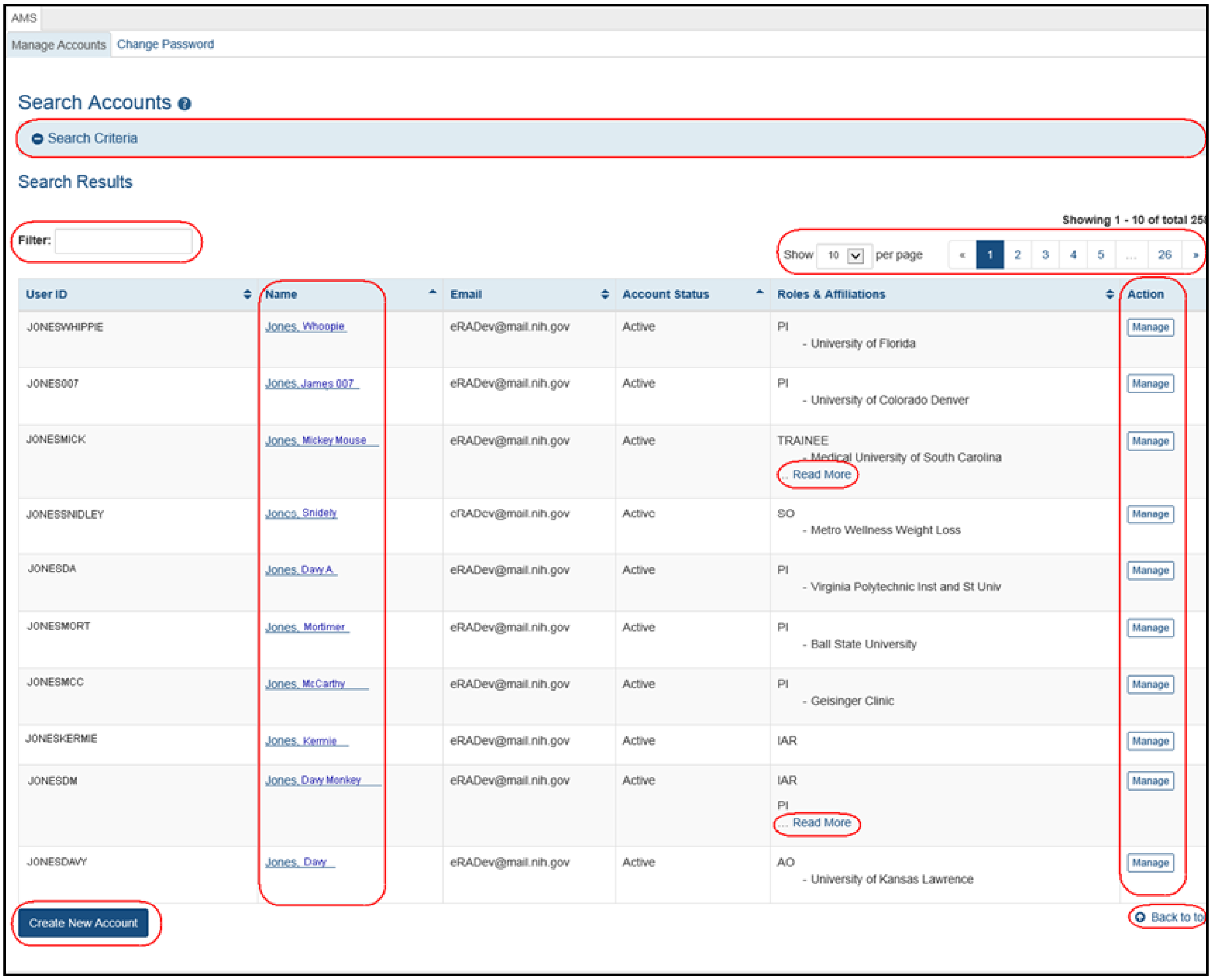

Figure 17: Search Accounts Screen Displaying Search Results

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:** 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:** text box.

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

---

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.

For information on Search Account error messages, please refer to the Error Messages topic.

4.3.3 Search for iEdison User Accounts

The *Search Accounts* screen for iEdison users (external, Agency, and iEdison Report Lite (ERL)) provides the ability to search for existing user and system account(s).

NOTE: For all iEdison users the **Search within my organization** check box is automatically checked.

External iEdison User

Here is the *Search Accounts* screen for iEdison external users.

NOTE: For external iEdison users the **User Type** is *Commons*.

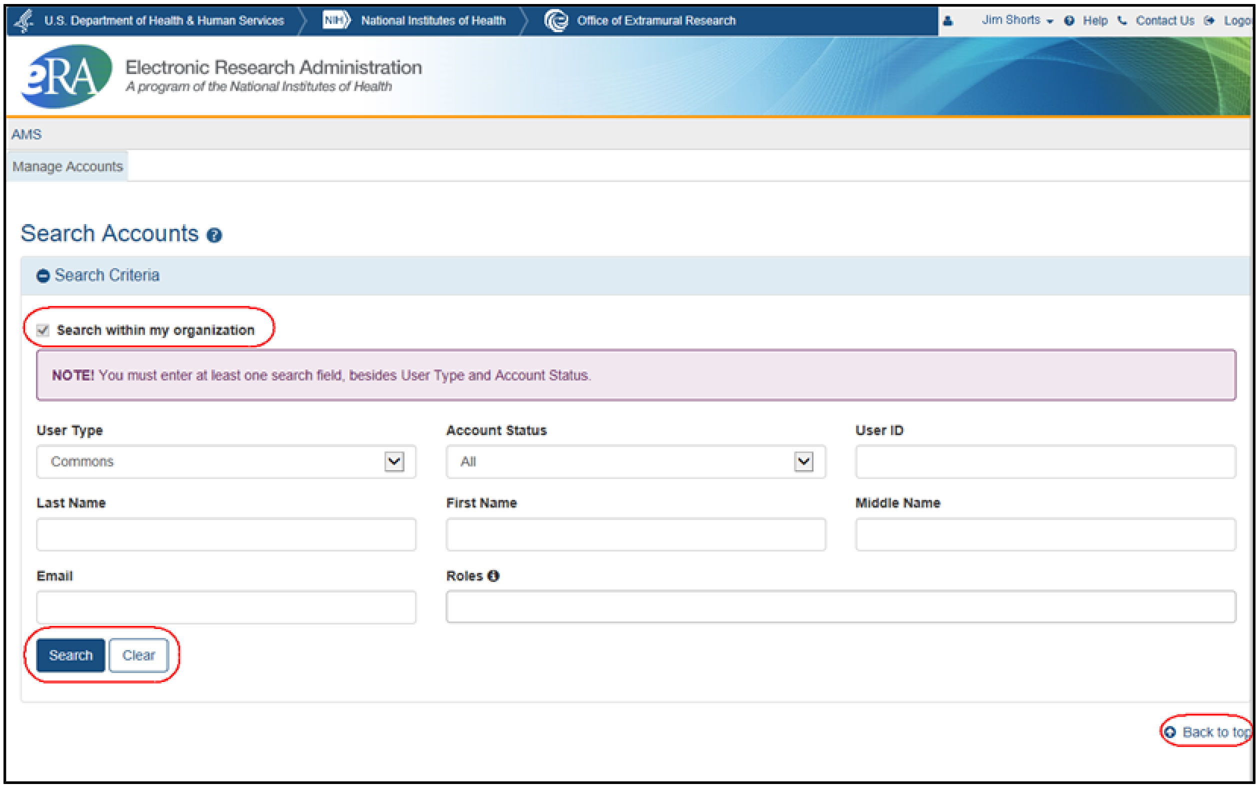

Figure 18: Search Accounts Screen for iEdison External Users

Agency and ERL iEdison User

Here is the *Search Accounts* screen for iEdison Agency/ERL users.

NOTE: For Agency/ERL users the **User Type** is *Agency*.

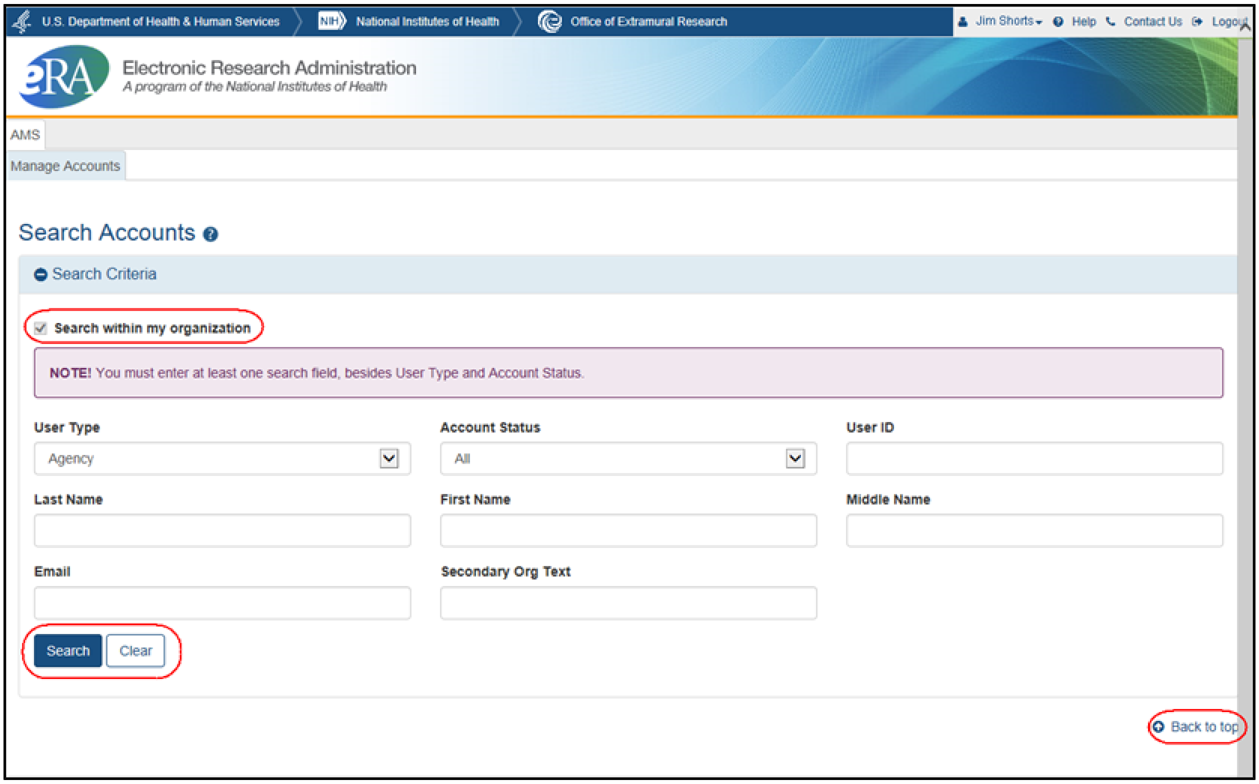

Figure 19: Search Accounts Screen for iEdison Agency/ERL Users

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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. If appropriate, select the appropriate Role.
    a. To select multiple roles, hold the **<Ctrl>** key and highlight the appropriate 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.

---

3. Perform one of the following options:
    a. Click the **Search** button to execute the search.
        i. Please refer to the Search Results for iEdison User Accounts topic or Agency and iEdison Agency/ERL User Account Search Results
    b. Click the **Clear** button to clear the search criteria.

If an external iEdison user has appropriate privileges to work with system accounts and the **User Type** selected is *System* , then the **Search within my organization** check box is automatically checked. For more information please refer to the Search for System Accounts topic.

For information on Search Account error messages, please refer to the Error Messages topic.

4.3.3.1 External iEdison User Account Search Results

When the **Search** button is clicked, the system displays appropriate user 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
- **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** button is **Manage**.

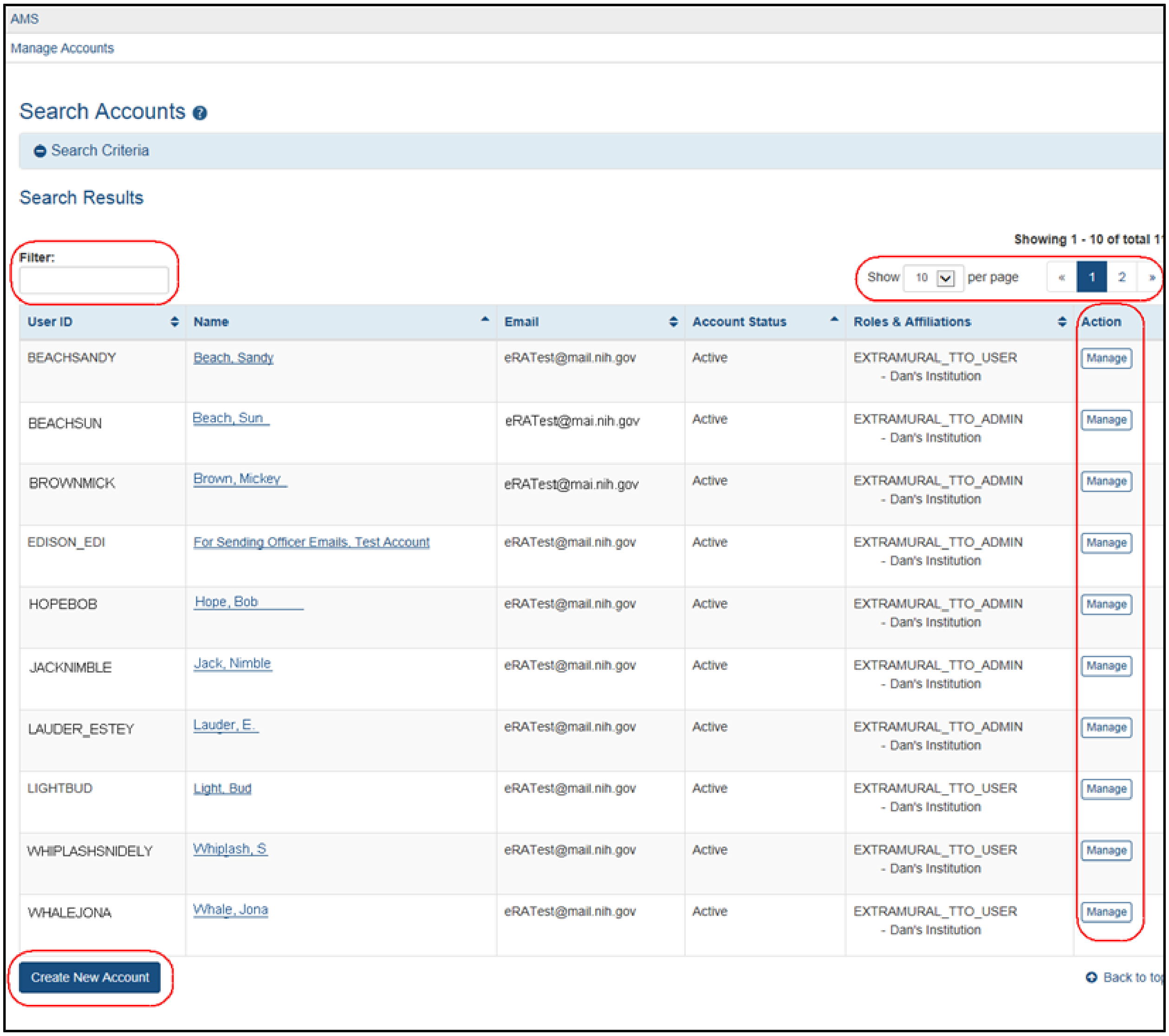


Figure 20: Search Accounts Screen Displaying External iEdison Search Results

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 Extramural TTO User role, type *TTO user* in the **Filter:** text box.

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

---

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 users' 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. Please refer to the Create Commons or external iEdison User Accounts topic.
10. To return to the top of the screen, click the **Back to top** hyperlink.

For information on Search Account error messages, please refer to the Error Messages topic

4.3.4 Search for State Department User Accounts

The *Search Accounts* screen for State Department users provides the ability to search for existing user accounts.

NOTE: For State Department users the **Search within my organization** check box is automatically checked and the only **User Type** is *State*.

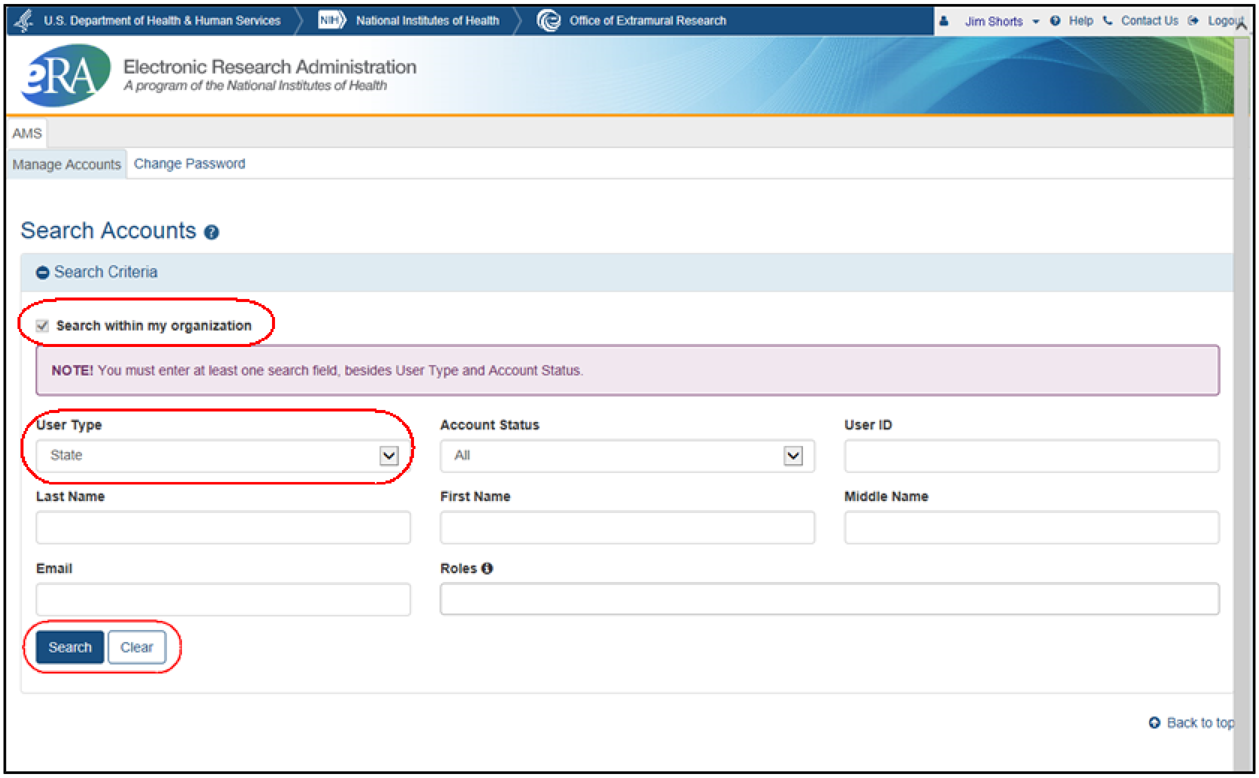


Figure 21: Search Accounts Screen for State Department Users

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.

---

1. Enter the appropriate search criteria in at least one of the other search fields.
2. Perform one of the following options:
    a. Click the **Search** button to execute the search.
        i. Please refer to the State Department User Account Search Results topic.
    b. Click the **Clear** button to clear the search criteria.

For information on Search Account error messages, please refer to the Error Messages topic.

4.3.4.1 State Department User Account Search Results

When the **Search** button is clicked, the system displays appropriate user 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
- **Email**
- **Account Status** -
  - *Active* - The **Manage** button displays in the **Action** column.
  - *Pending Affiliation* - The **Manage** button displays in the **Action** column.
- **Roles & Affiliations** - FACTS SDC MGR ROLE only
- **Action** - The **Action** buttons are **Create** and **Manage**.

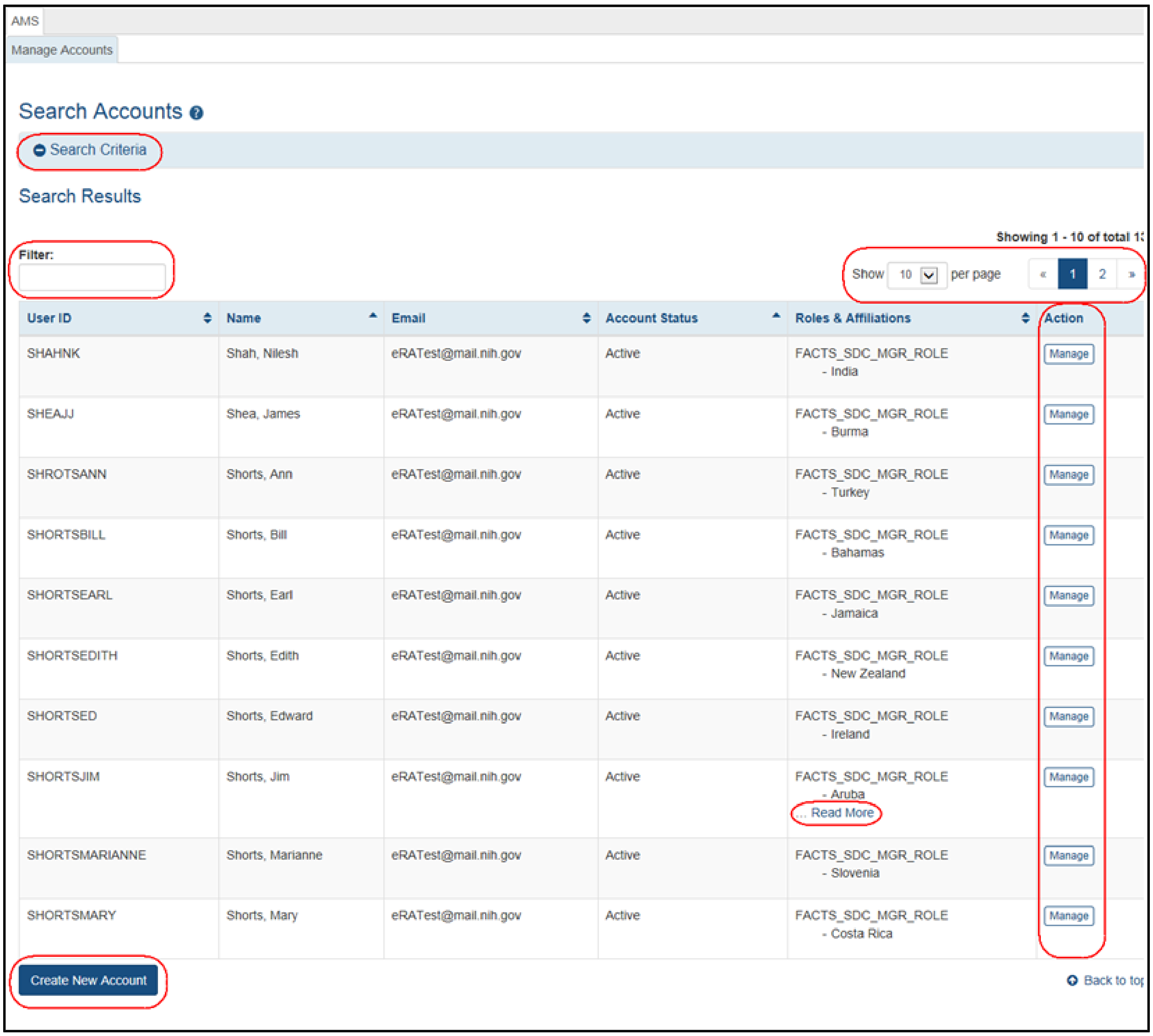


Figure 22: Search Accounts Screen Displaying State Department Search Results

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 word *Ann* in the **Name** or **User ID**, type *ANN* in the **Filter:** text box.

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

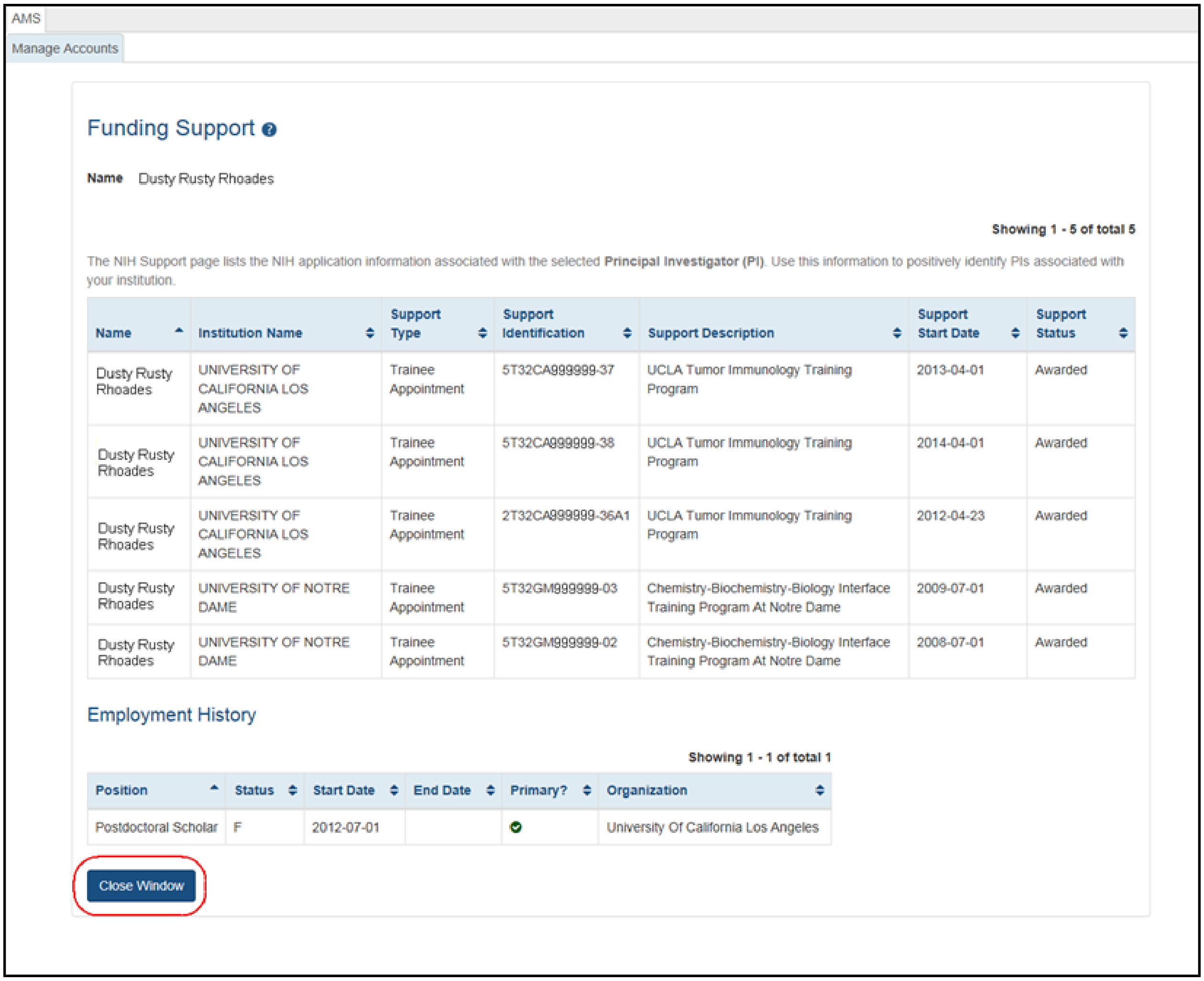
3. To change the number of records per page, select the appropriate number in the **Show per page** column.
4. To navigate between pages, perform one of the following options:
    a. Click the appropriate **Page Number** button.
    b. Click the **right double arrows** button to go to the end of the 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. If displayed, click the **Read More** hyperlink in the **Roles and Affiliations** column to view a Principal Investigator's (PI) multiple affiliations.
7. To perform one of the options in the **Action** column, please refer to the Actions Options topic.
8. 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 State Department User Accounts topic for more information.
9. To return to the top of the screen, click the **Back to top** hyperlink.

For information on Search Account error messages, please refer to the Error Messages topic

4.3.5 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

Position	Status	Start Date	End Date	Primary?	Organization
Postdoctoral Scholar	F	2012-07-01		✔	University Of California Los Angeles

Close Window

Figure 23: Funding Support Screen

4.4 Search for System Accounts

The *Search Accounts*screen provides the ability to search for existing user and system account(s). The **Search within my organization** check box is automatically checked.

NOTE: iEdison Agency, iEdison ERL, and State Department users cannot search for or create system accounts.

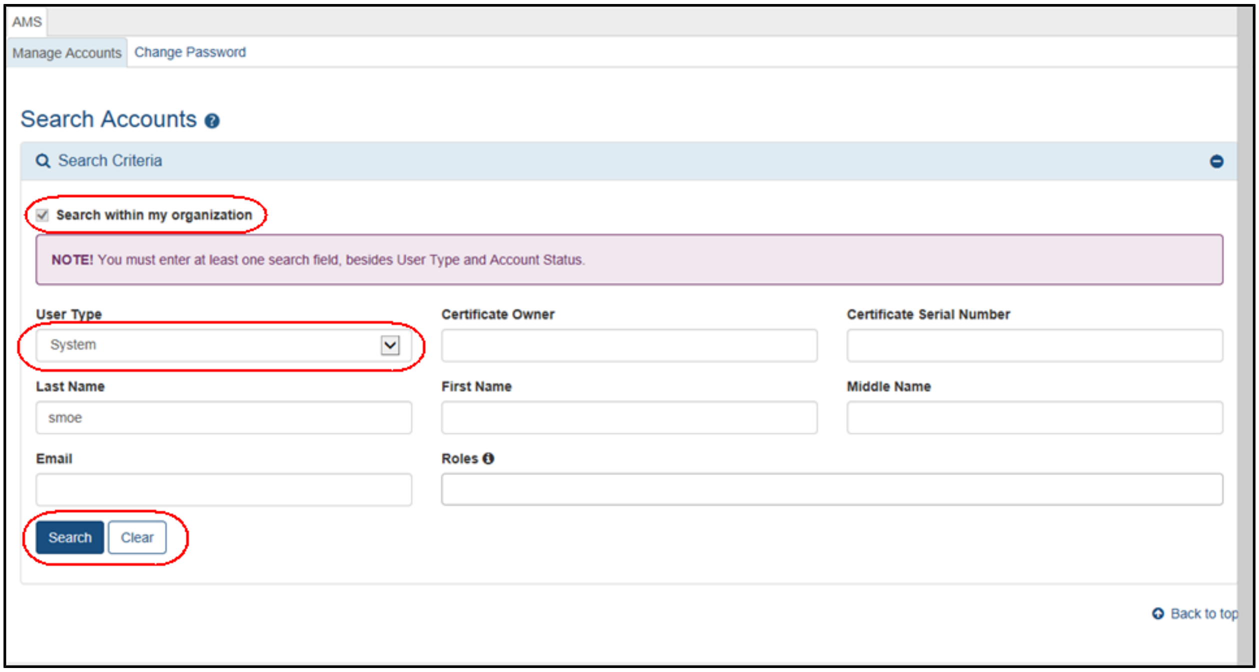


Figure 24: Search Accounts Screen Displaying Searching for System Accounts

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

Perform the following steps:

1. To perform a search for a system account, select *System* from the **User Type** field's drop-down menu.

NOTE: When the **User Type** selected is *System*, then the **Search within my organization** check box is automatically checked.

2. Enter the appropriate search criteria in at least one of the other search fields besides **User Type**.
3. If appropriate, select the appropriate Role.
    a. To select multiple roles, hold the **<Crtl>** key and highlight the appropriate 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.

4. Perform one of the following options:
   a. Click the **Search** button to execute the search.
      i. For more information on search results, see the System Account Search Results topic.
   b. Click the **Clear** button to clear the fields.

4.4.1 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**.

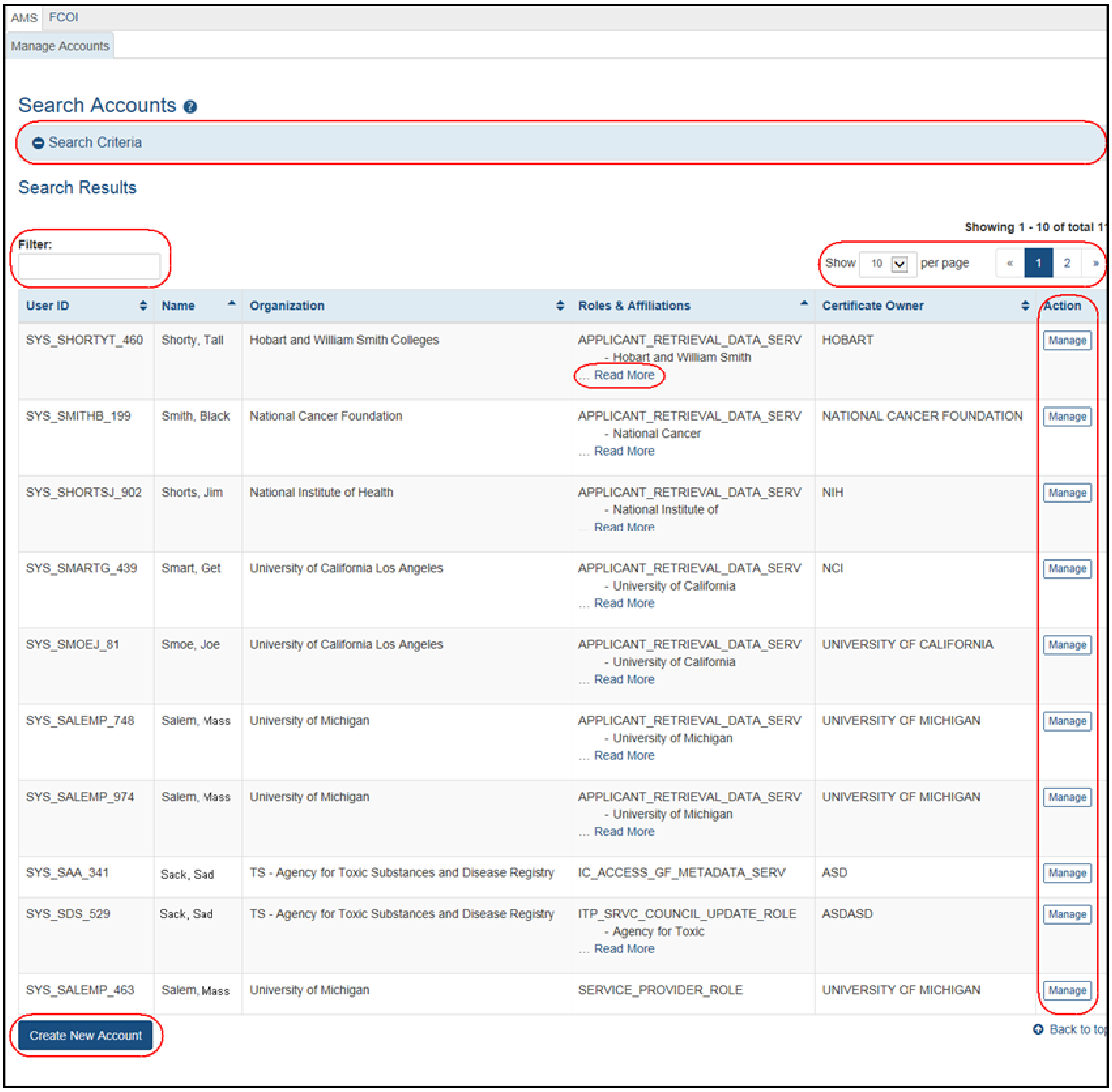


Figure 25: Search Accounts Screen Displaying System Accounts Search Results

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.

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.

For information on Search Account error messages, please refer to the Error Messages topic.

4.5 Action Option Buttons

The **Action** column's buttons appear in the search result's depending on the account status and the logged in user's role.

The following action buttons are available:

- **Create**
- **Manage**
- **Resend Email**
- **View**

4.5.1 Create Button

The **Create** button displays on the *Search Accounts* screen when there is a profile, but there is no user account.

Agency Users

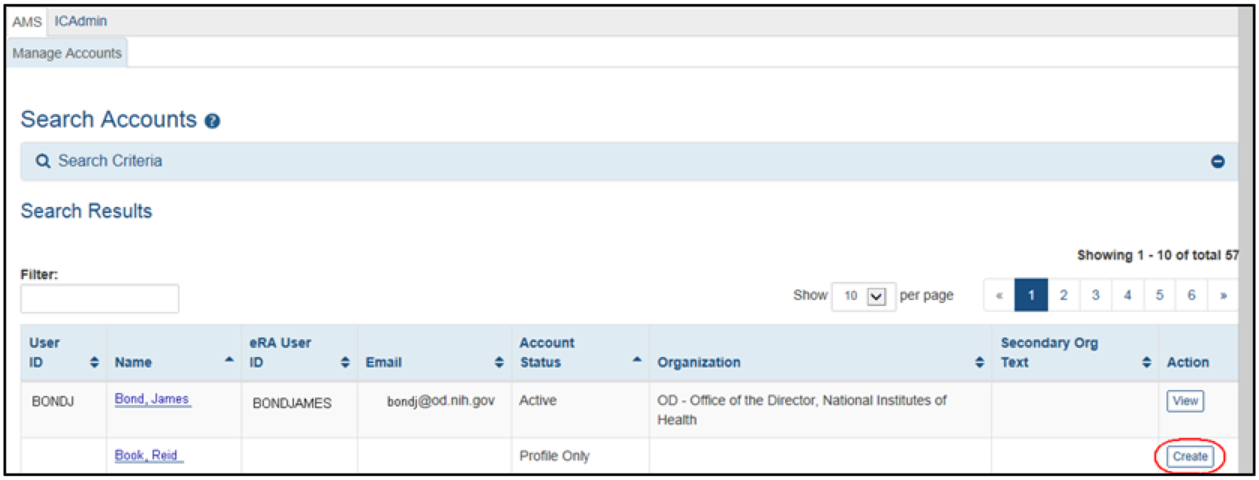


Figure 26: Search Accounts Screen Displaying the Create Button

1. To create a Commons account, click the **Create** button for the appropriate person.

For more information on creating accounts, please refer to the Create Account - Agency Users topic.

Commons Users

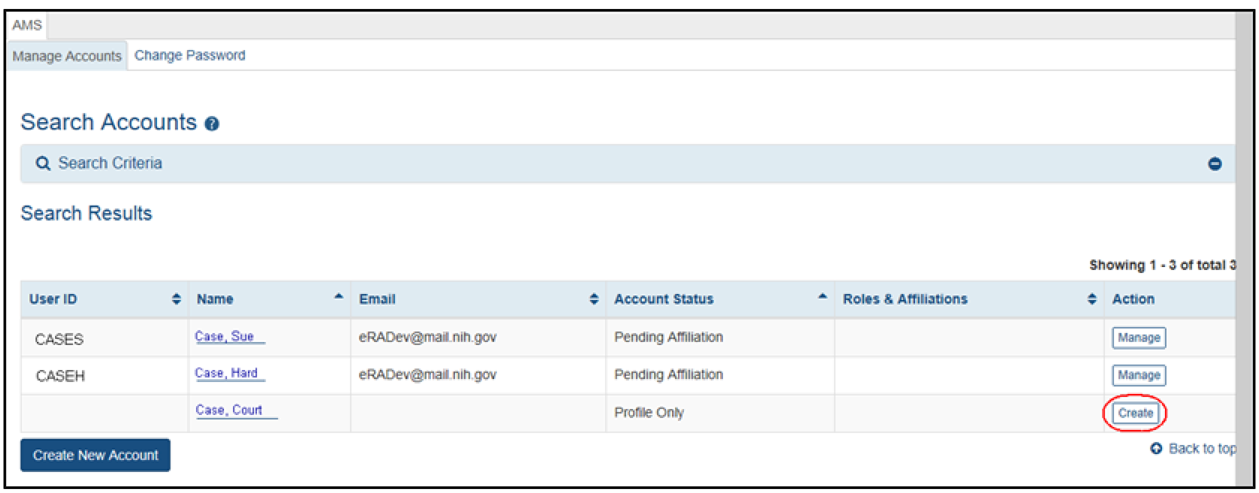


Figure 27: Search Accounts Screen Displaying the Create Button

1. To create a Commons account, click the **Create** button for the appropriate person.

For more information on creating accounts, please refer to the Create Account - Commons Users topic.

4.5.2 Manage Button

Agency and iEdison Agency/ERL Users

The **Manage** button appears if the account status is *Active* or *Pending Affiliation* for the appropriate record per the logged in user's IC.

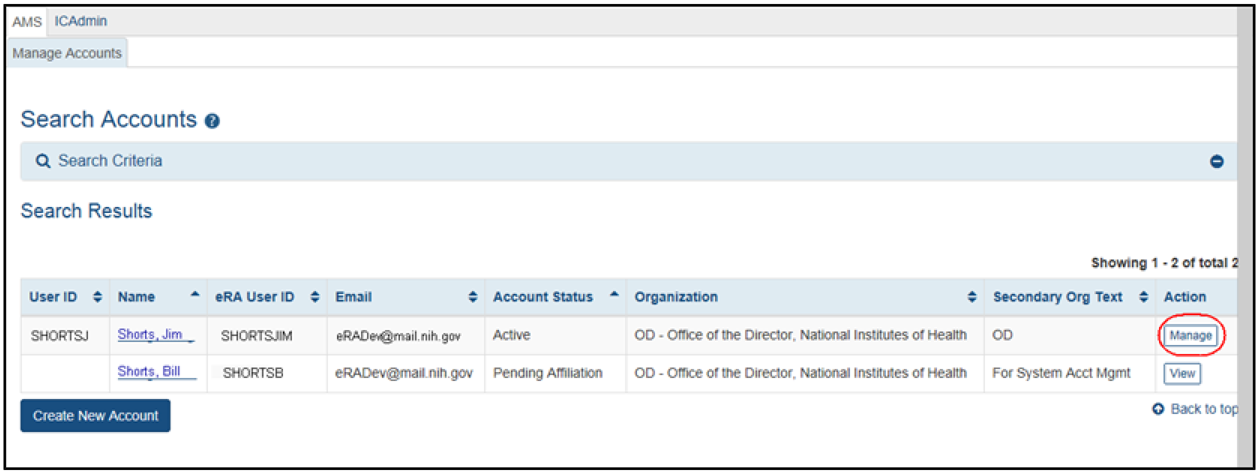


Figure 28: Search Accounts for Internal Users Displaying the Manage Button

When the **Manage** button is clicked, the *Manage Accounts* screen displays.

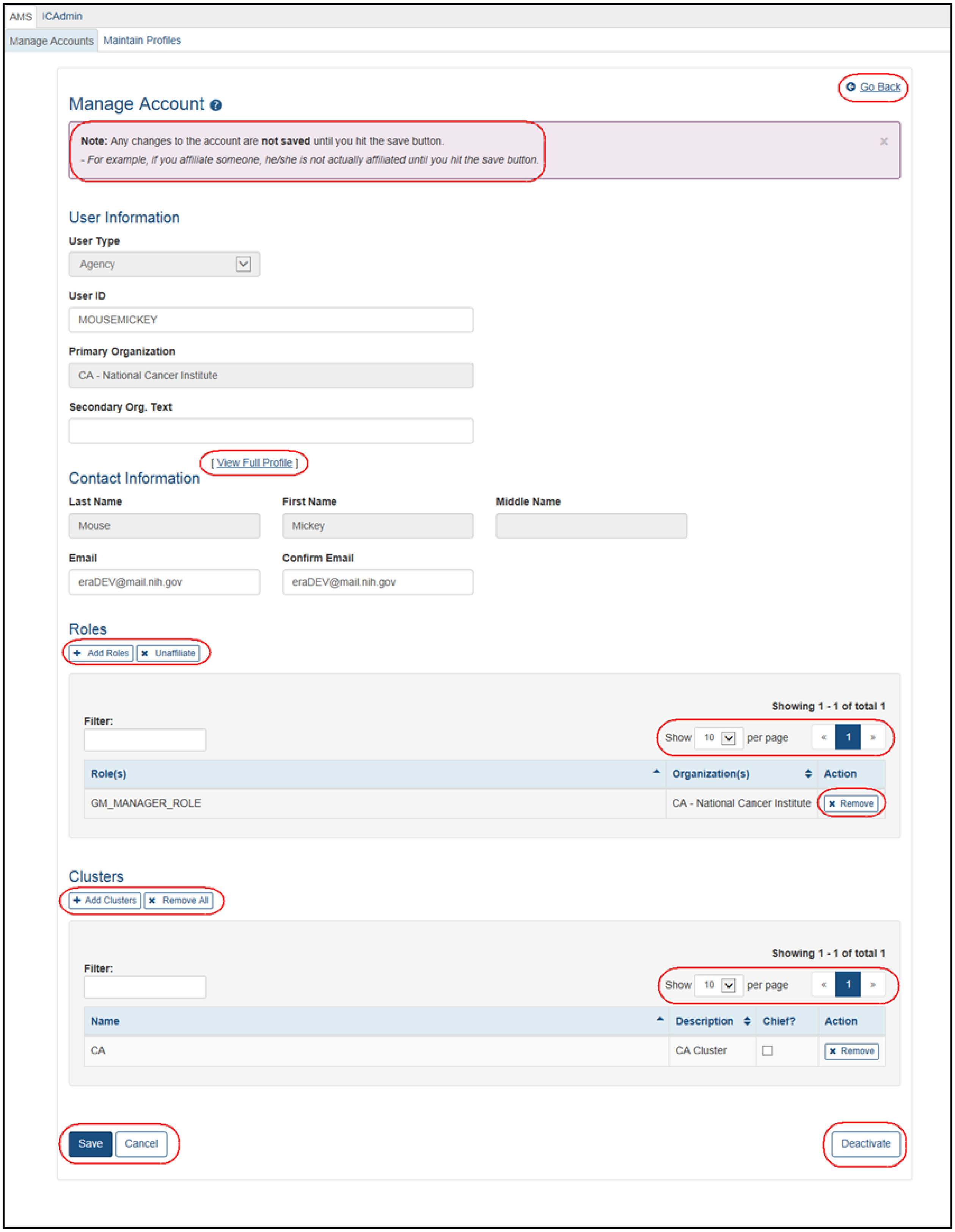


Figure 29: Manage Account Screen for Internal Users

For more information, please refer to the Manage Agency User Accounts topic.

Commons and external iEdison Users

The **Manage** button appears if the account status is *Active* or *Pending Affiliation*.

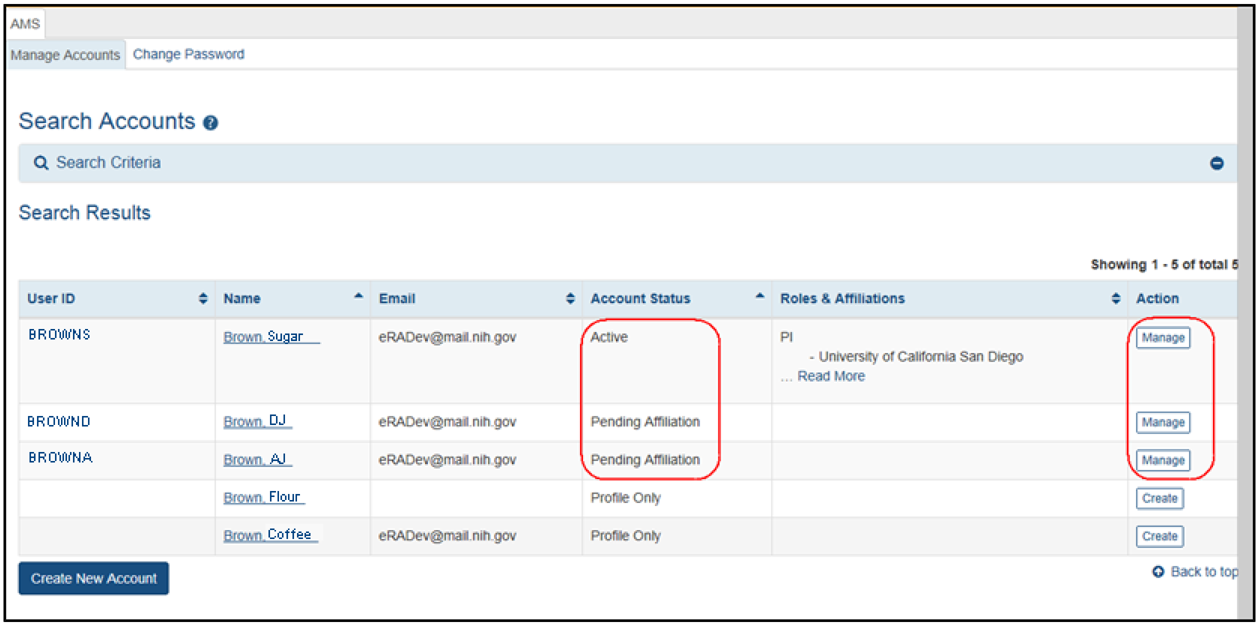


Figure 30: Search Accounts for External Users Displaying the Manage Button

1. To edit an account, click the appropriate **Manage** button.

When the **Manage** button is clicked, the *Manage Account* screen displays.

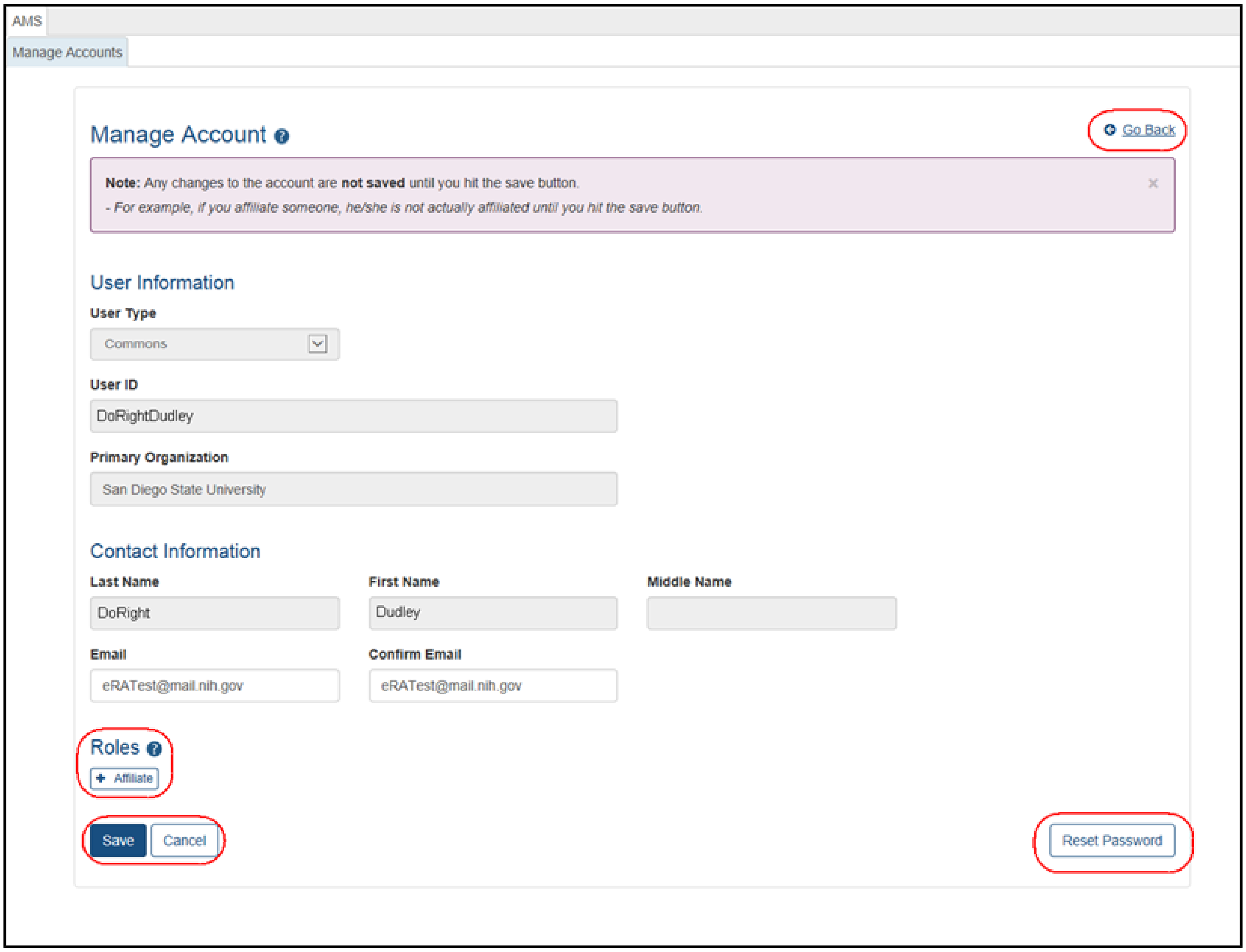


Figure 31: Manage Account Screen for External Users

For more information, please refer to the Manage Commons User Accounts topic.

State Department Users

For State Department users the **Manage** button appears if the account status is *Active* or *Pending Affiliation*.

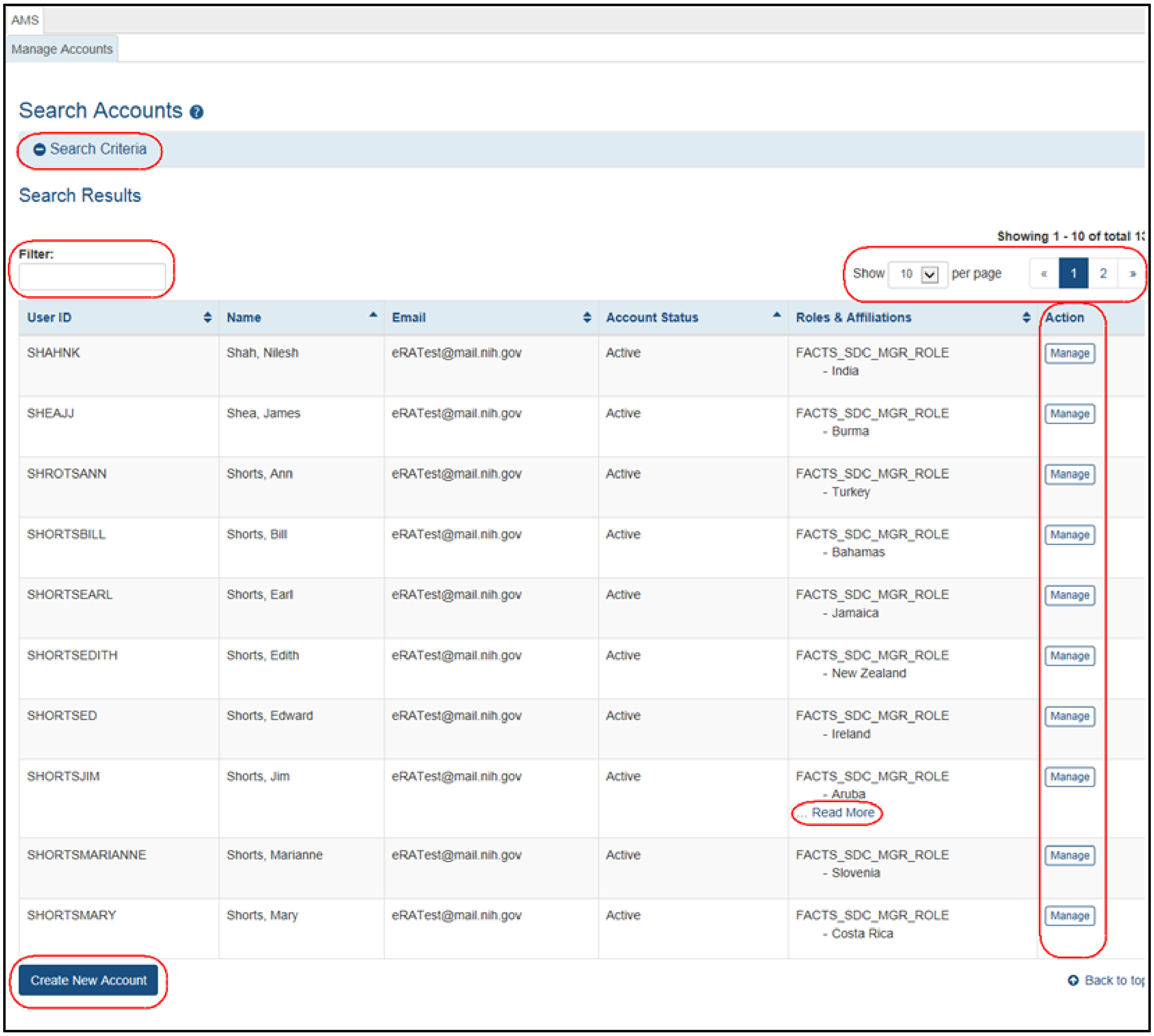


Figure 32: Search Accounts Displaying State Department Search Results

1. To edit an account, click the appropriate **Manage** button in the **Action** column.

When the **Manage** button is clicked, the *Manage Account* screen is displayed.

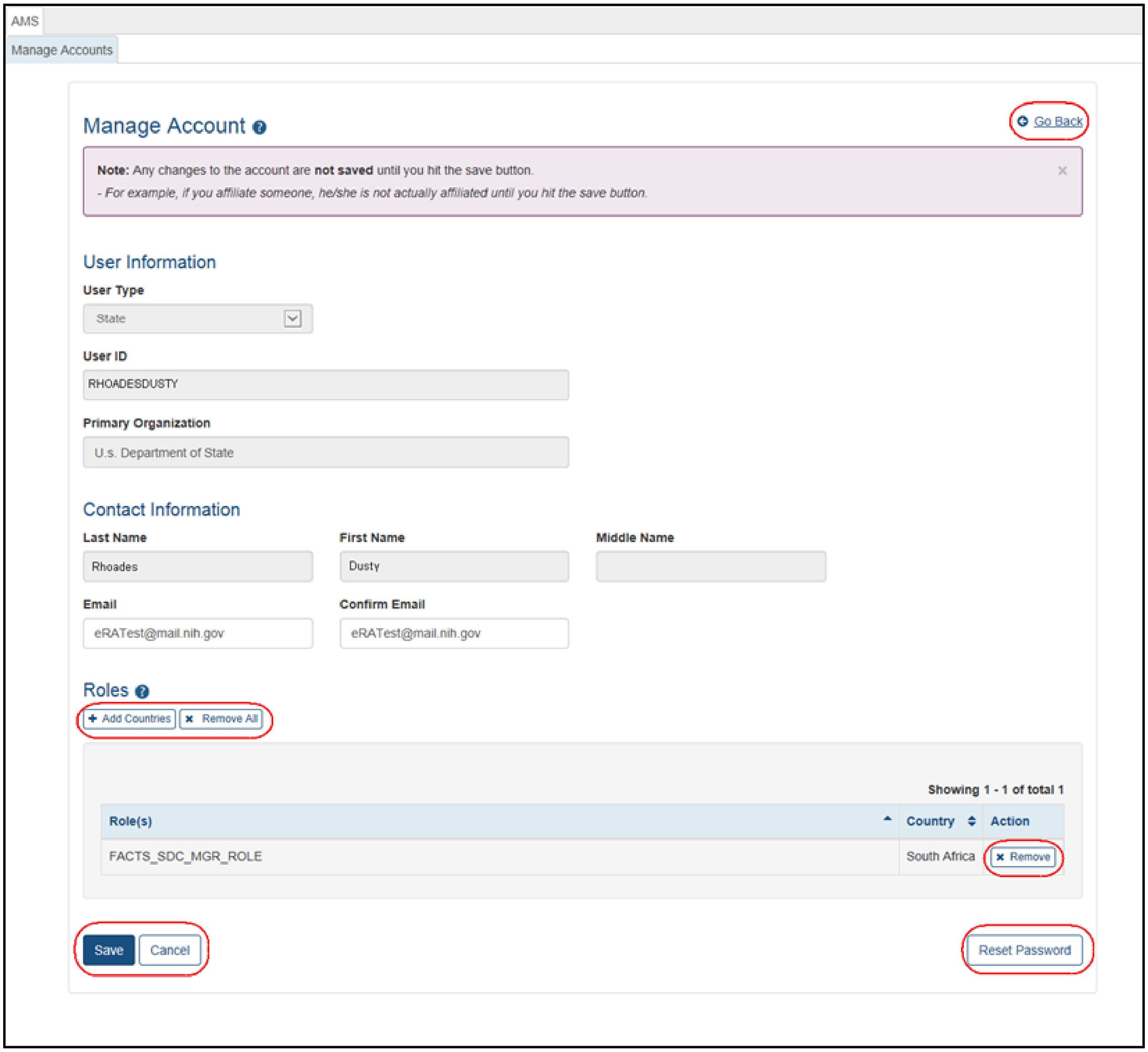


Figure 33: Manage Account for State Department Users

Please refer to the Manage State Department User Accounts topic for more information.

4.5.3 Resend Email Button

NOTE: For **Commons and external iEdison users only** the **Resend Email** button appears on the *Search Accounts* screen for user type accounts. These are accounts that are pending user review indicating that the user has not validated the account request.

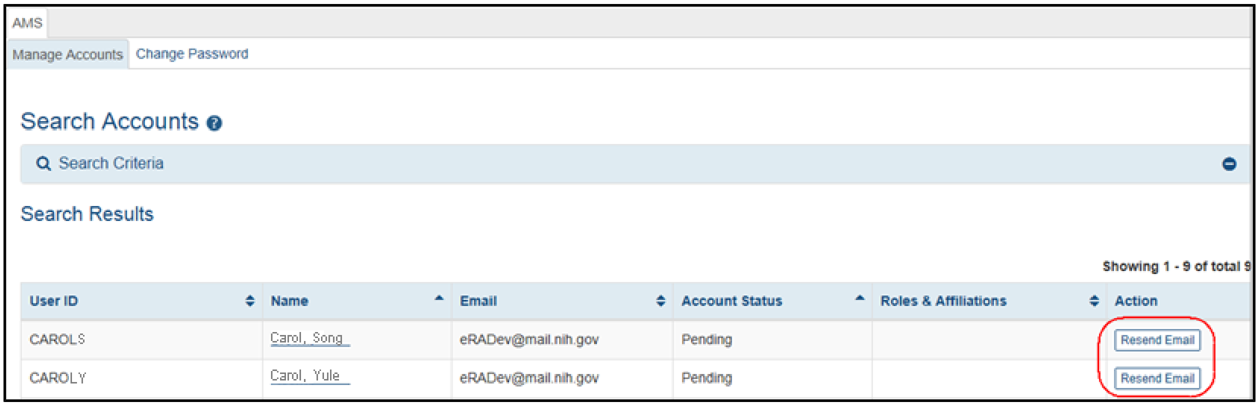


Figure 34: Search Accounts Screen Displaying the Resend Email Button

1. To resend an email if present, click the **Resend Email** hyperlink for the appropriate account.

When the **Resend Email** hyperlink is clicked, the system sends an email notification to the account holder.

4.5.4 View Button

NOTE: The **View** button appears on the *Search Accounts* screen for an active account that is not within the logged in user's Agency or IC. The View feature is for **Agency Management** and **iEdison Agency Staff** only.

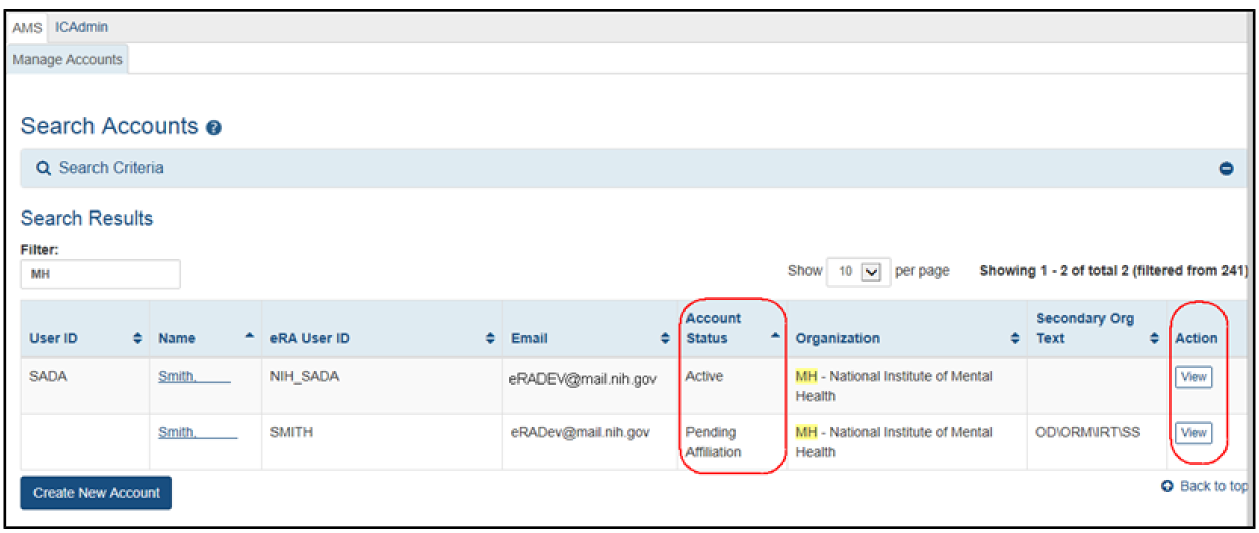


Figure 35: Search Accounts Screen Displaying the View Button

1. To view the *Account Details* screen, click the appropriate **View** button .

When the **View** button is clicked, the *Account Details* screen is displayed for the appropriate account.

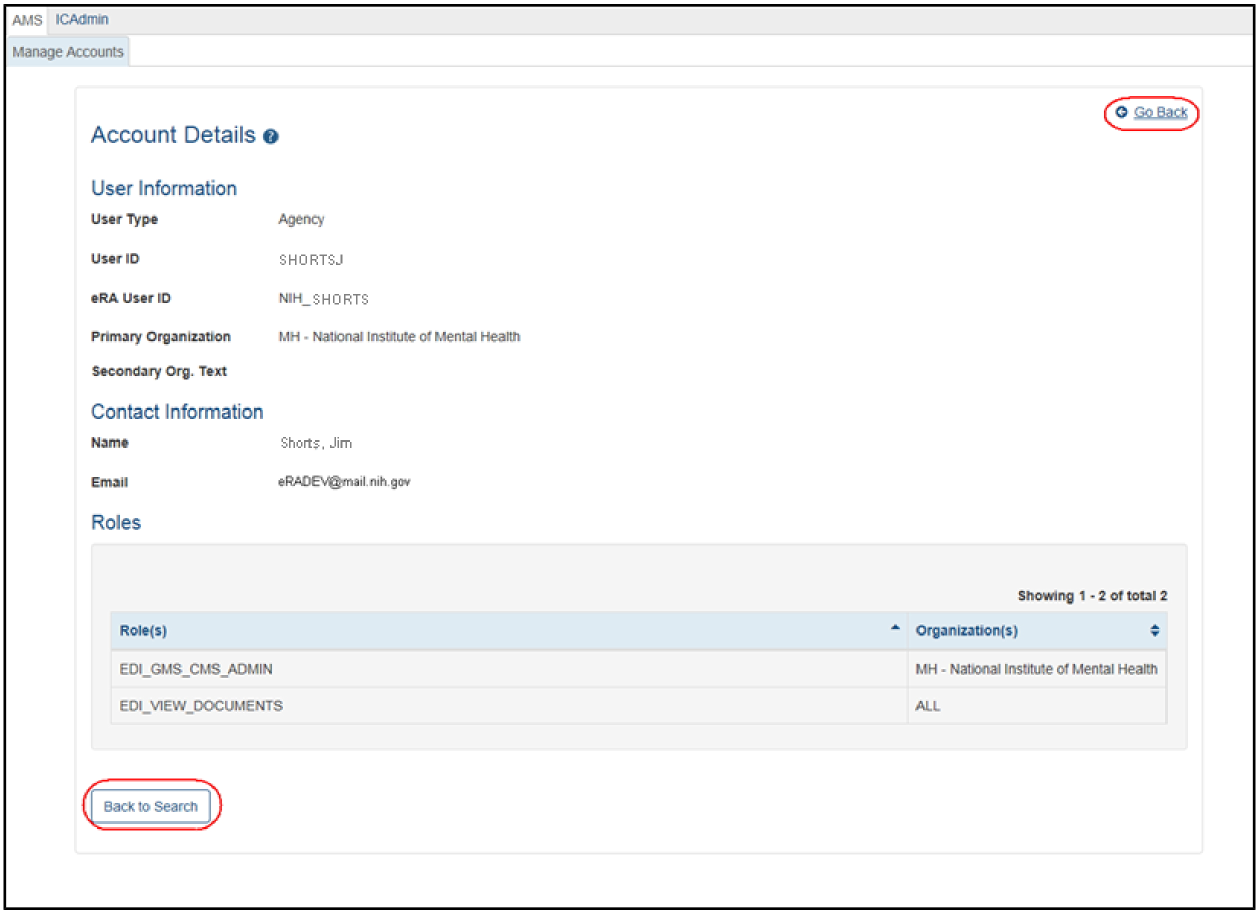


Figure 36: Account Details Screen

2. To return to the search results, click the **Go Back** hyperlink.
3. To start a new search, click the **Back to Search** button.

5 Create Accounts

There is the ability to create the following accounts:

- User Accounts
- System Accounts

5.1 Create User Accounts

There are various types of user accounts:

- Agency and iEdison Agency/ERL
- Commons and iEdison
- State Department

5.1.1 Create Agency or iEdison Agency/ERL User Accounts

1. To create an account perform a search first.
    a. Please refer to the Search for Agency User Accounts topic or Search for iEdison User Accounts.

The *Create Account* screen is displayed when one of the following buttons is clicked on the *Search Accounts* screen:

- **Create** button for existing accounts
- The **Create** button displays when there is a user profile, but there is no user account.

IMPORTANT: For iEdison Agency/ERL users the Internet Review Group (IRG) Clusters functionality does not apply and is not viewable.

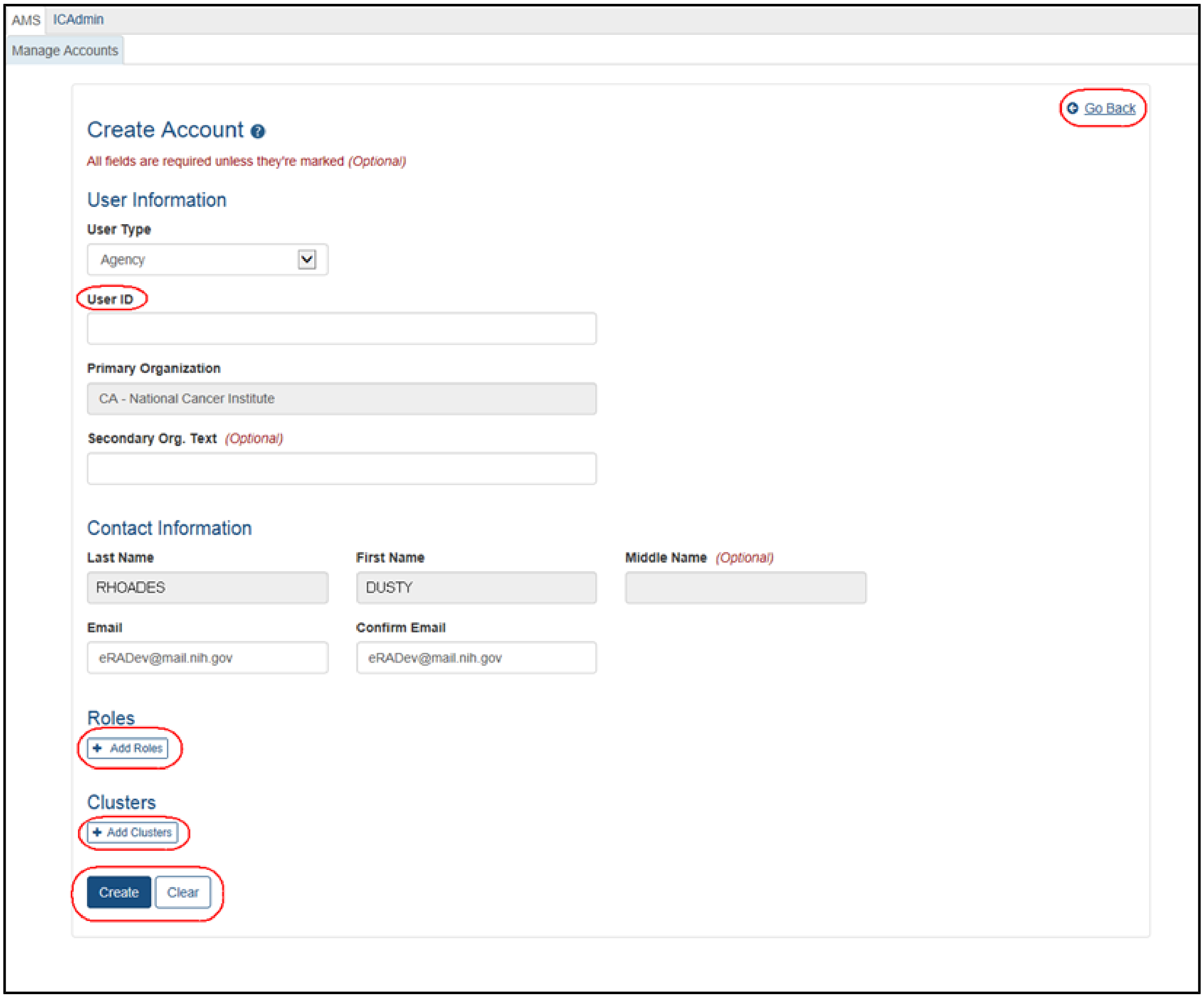


Figure 37: Create Account Screen for Existing Internal Accounts

- **Create New Account** button

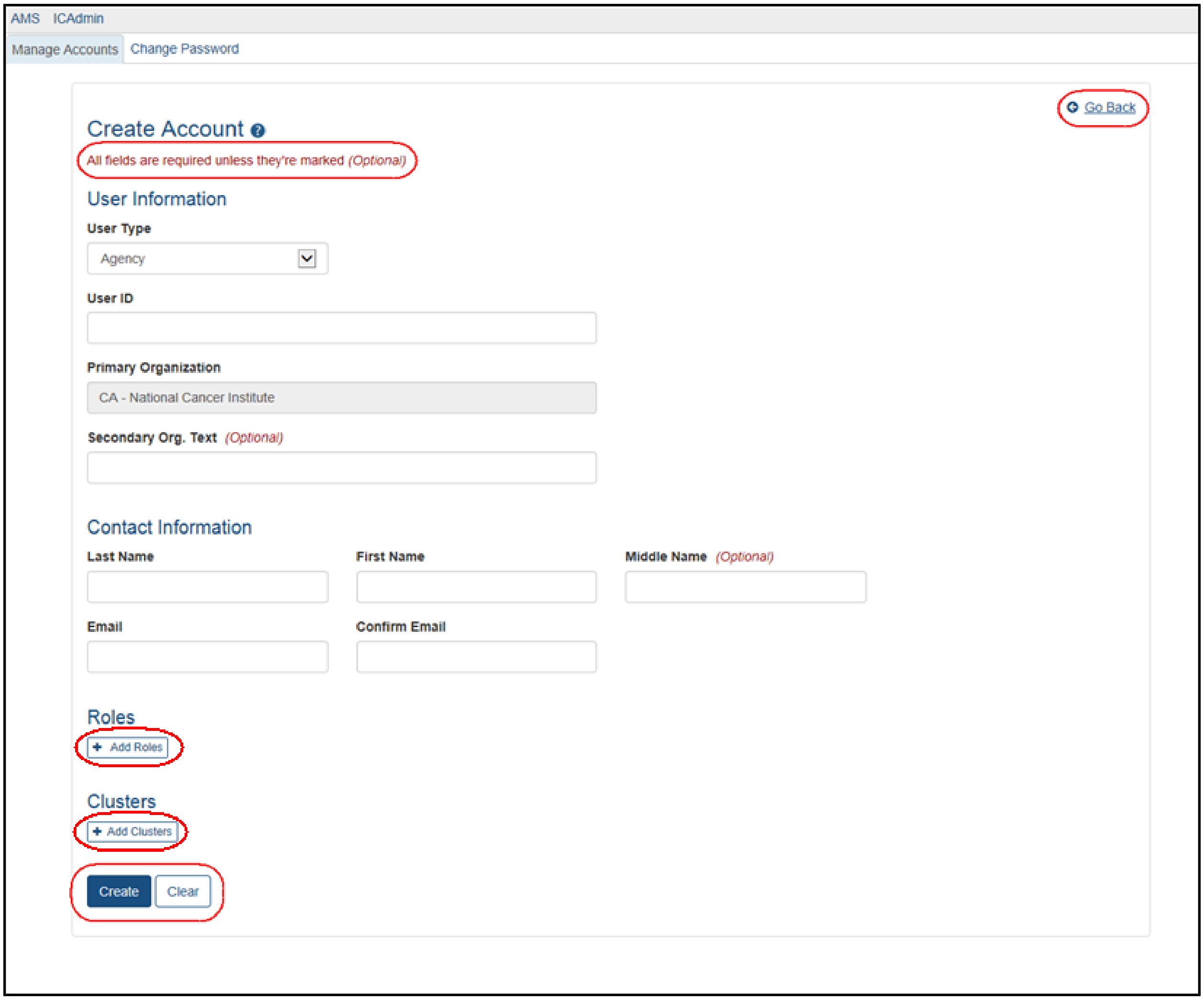


Figure 38: Create Account Screen for a New Internal Accounts

Perform the following steps :

1. The **User Type** is Agency.
2. 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*.
3. Usually the **Primary Organization** defaults to the logged in user's organization.
    a. If present, click the magnifying glass icon to assign a **Primary Organization**.
    b. Please refer to the Set Primary Organization topic.
4. For *Contact Information*, enter the **Last Name** and the **First Name**.
5. Enter the **Email** and **Confirm Email** addresses.

6. To add roles, please refer to the Add/Delete Roles topic.
7. To add clusters, please refer to the Add/Delete IRG Clusters topic.
8. Perform one of the following options:
    a. When the account information is complete, click the **Create** button.
    b. Click the **Clear** button to clear the data entered in the fields.

When the **Create** button is clicked, the system displays the following message on the *Account Details* screen: *Account created successfully*.

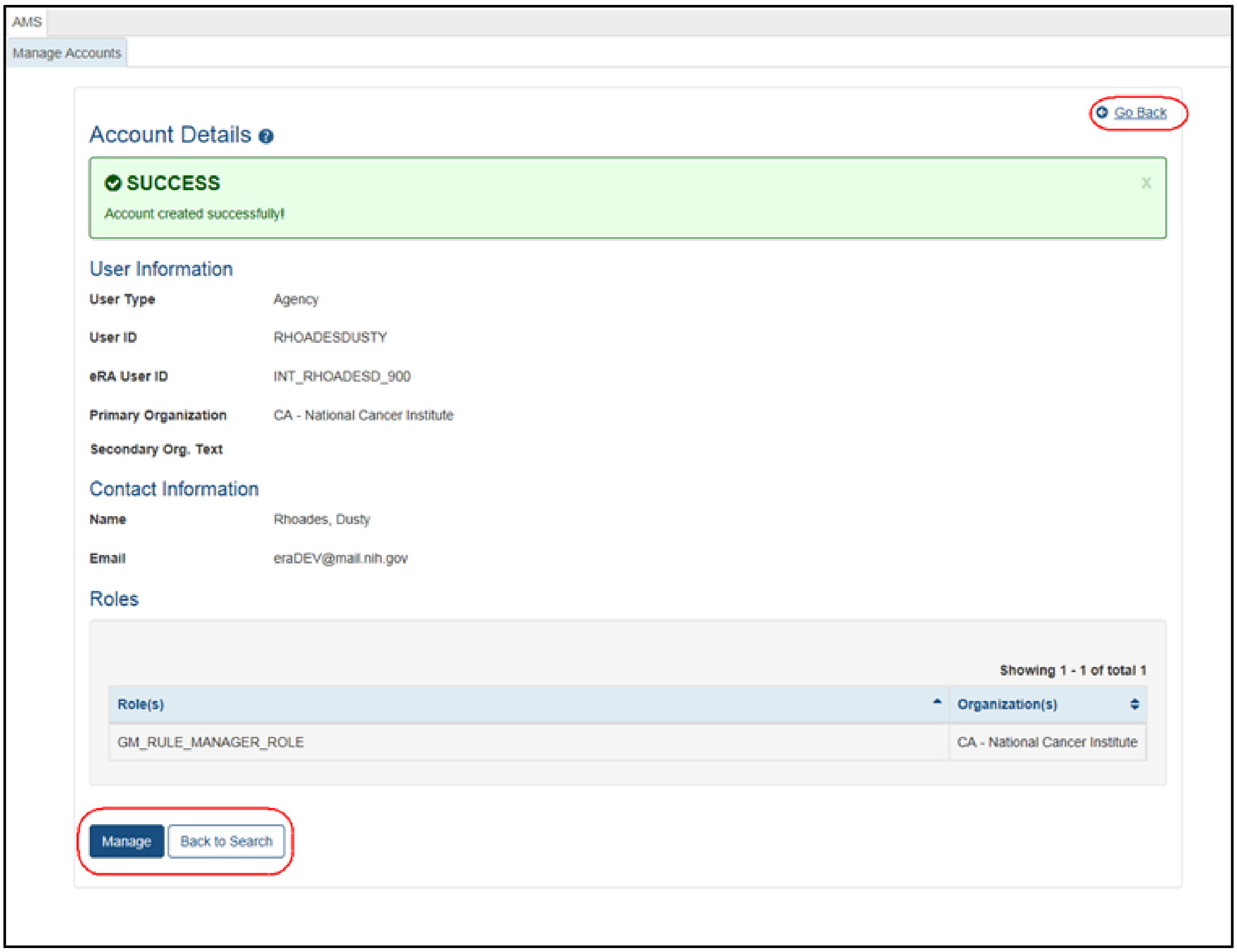


Figure 39: Account Details Screen Displaying Message

9. 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.
        i. For more information, please refer to the Manage Agency and iEdison Agency/ERL User Accounts topic.

c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

5.1.2 Create Commons or external iEdison User Accounts

1. To create an account perform a search first.
   a. Please refer to the Search Account for Commons Accounts or the Search for iEdison User Accounts topic.

NOTE: For external iEdison users, the Create Account screen can be access by clicking the **Create an iEdison Account** hyperlink on the iEdison *Main Menu* screen.

The *Create Account* screen is displayed when one of the following buttons is clicked on the *Search Accounts* screen:

- **Create** button in the **Action** column for existing accounts
- The **Create** button displays when there is a user profile, but there is no user account.

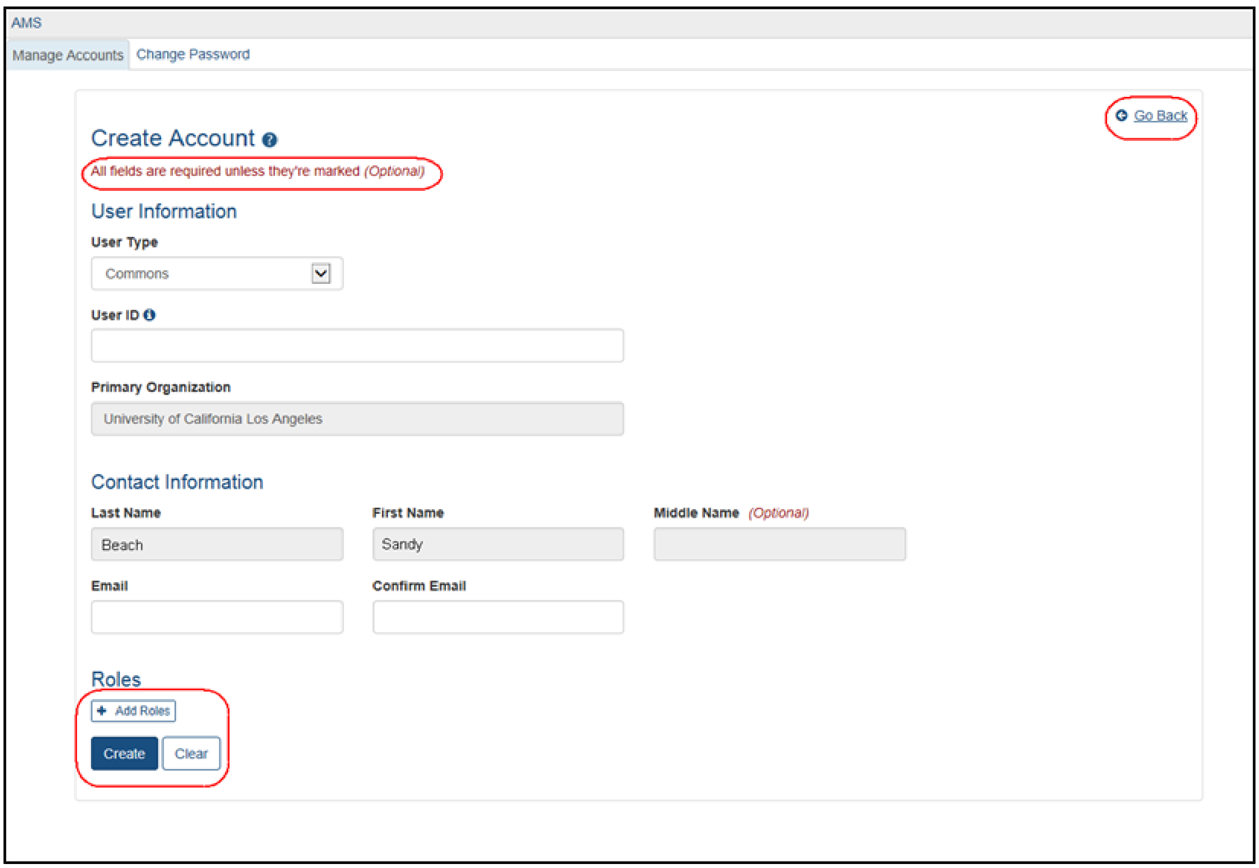


Figure 40: Create Account Screen for an Existing External Account

- **Create New Account** button

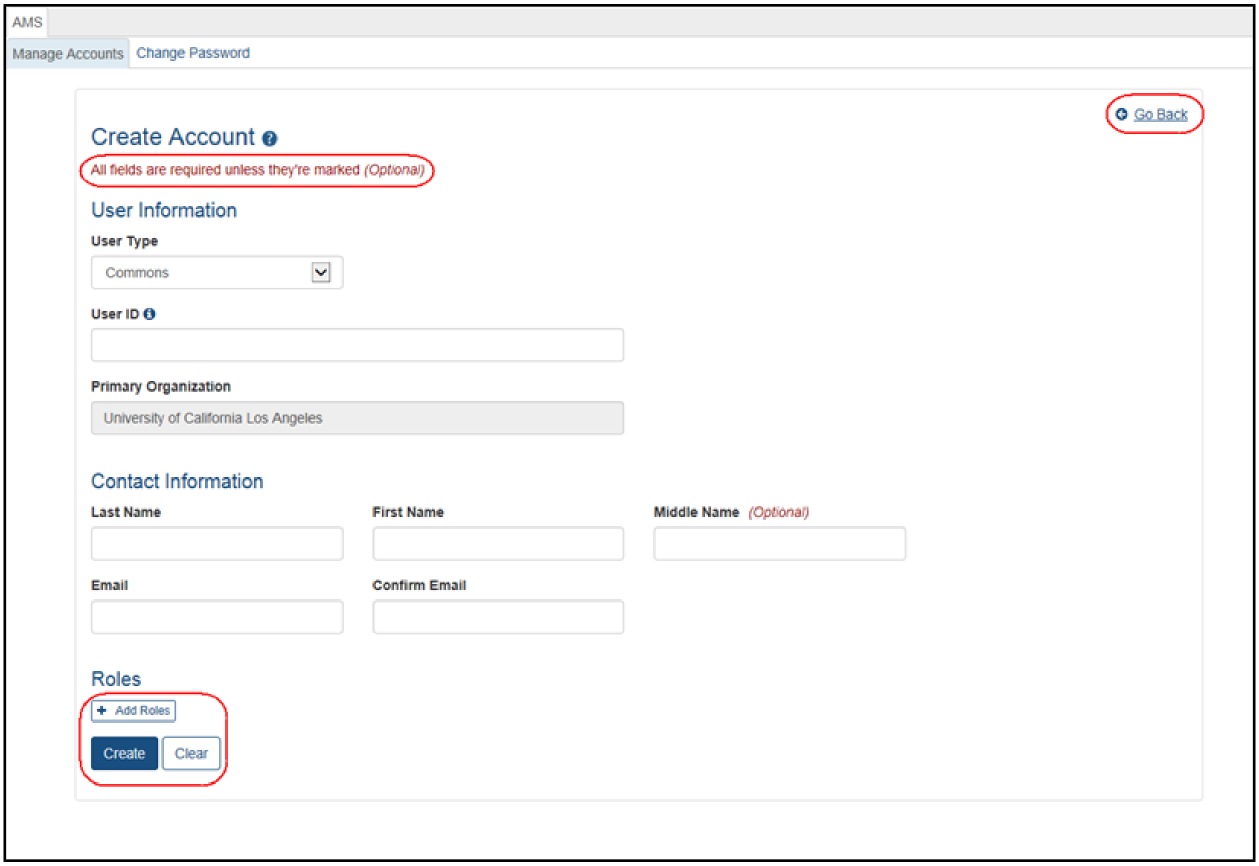


Figure 41: Create Account Screen for a New External Account

Perform the following steps :

2. The **User Type** is Commons.
3. 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*.
4. Usually the **Primary Organization** defaults to the logged in user's organization.
    a. If there is no user organization name, click the magnifying glass icon to assign a **Primary Organization**.
    b. Please refer to the Set Primary Organization topic for more information.
5. Perform one of the following options:
    a. When the account information is complete, click the **Create** button.
    b. Click the **Clear** button to clear the data entered in the fields.

When the **Create** button is clicked, the system displays the following message on the *Account Details* screen: *Account created successfully*.

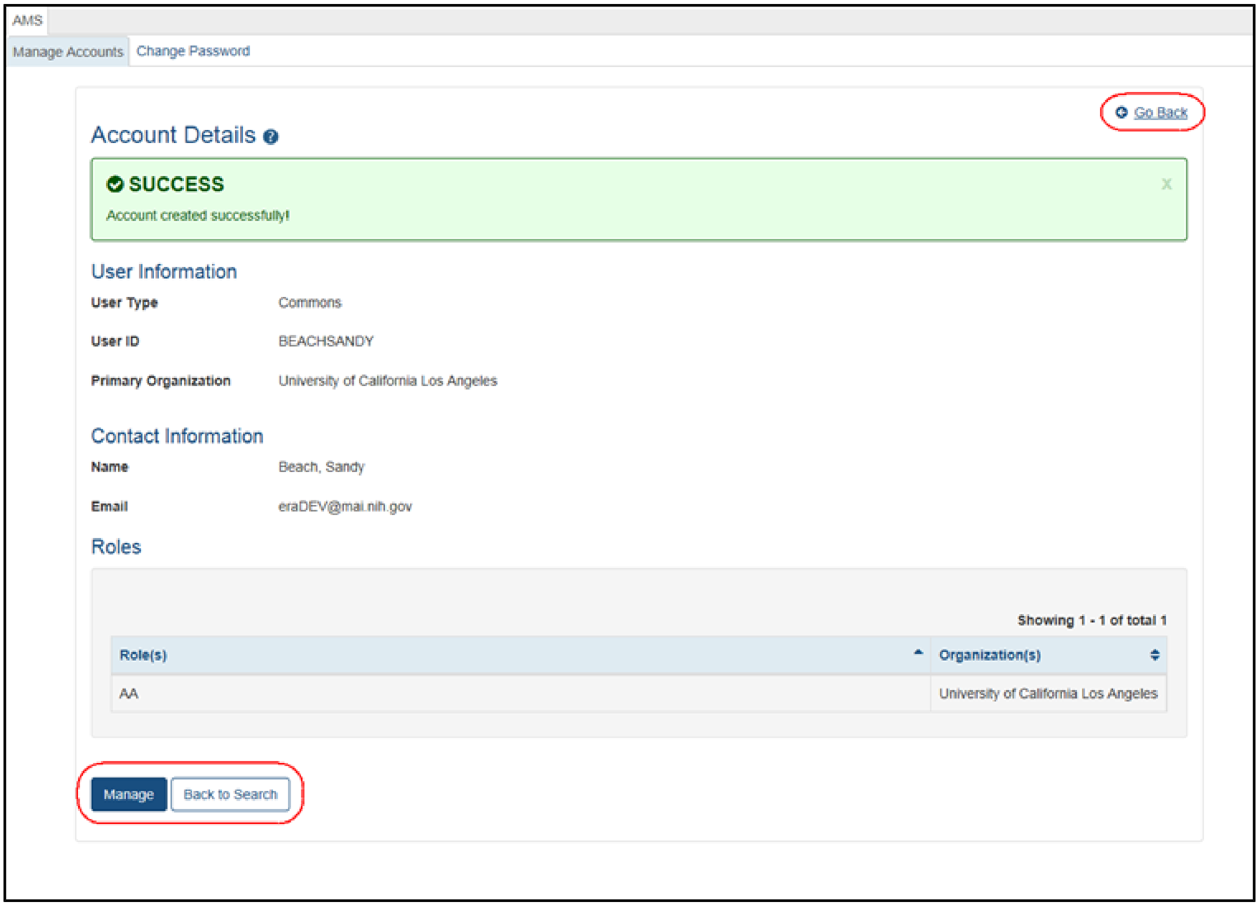


Figure 42: Account Details Screen Displaying Message

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.

5.1.3 Create State Department User Accounts

1. To create an account perform a search first.
    a. Please refer to the Search Account for State Department Users topic.

When the **Create New Account** button is clicked on the *Search Accounts* screen, the *Create Account* screen is displayed.

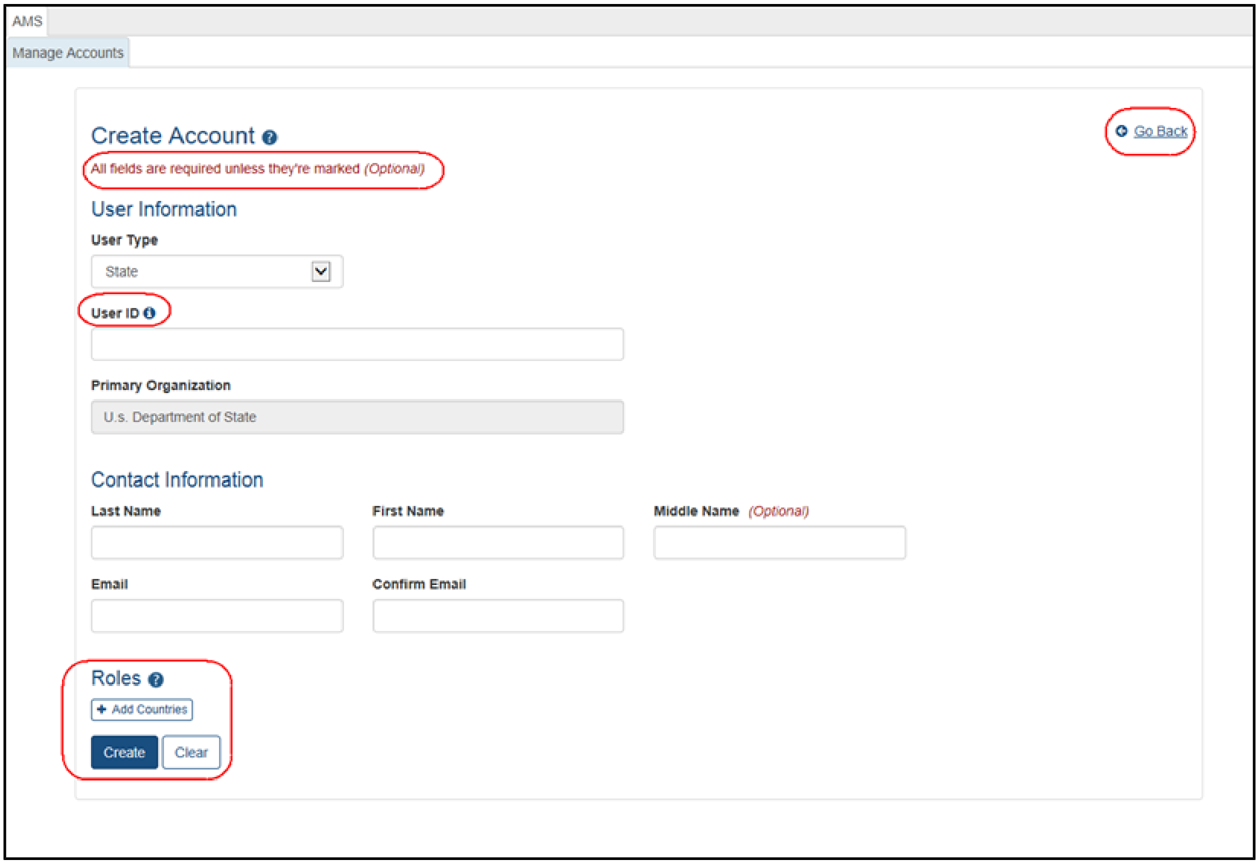


Figure 43: Create Account Screen for State Department Users

Perform the following steps :

2. The **User Type** is State.
3. 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*.
4. To add countries, click the + **Add Countries** button.
   a. Please refer to the Add Countries topic for more information.
5. Perform one of the following options:
   a. When the account information is complete, click the **Create** button.
   b. Click the **Clear** button to clear the data entered in the fields.

When the **Create** button is clicked, the system displays the following message on the *Account Details* screen: *Account created successfully*.

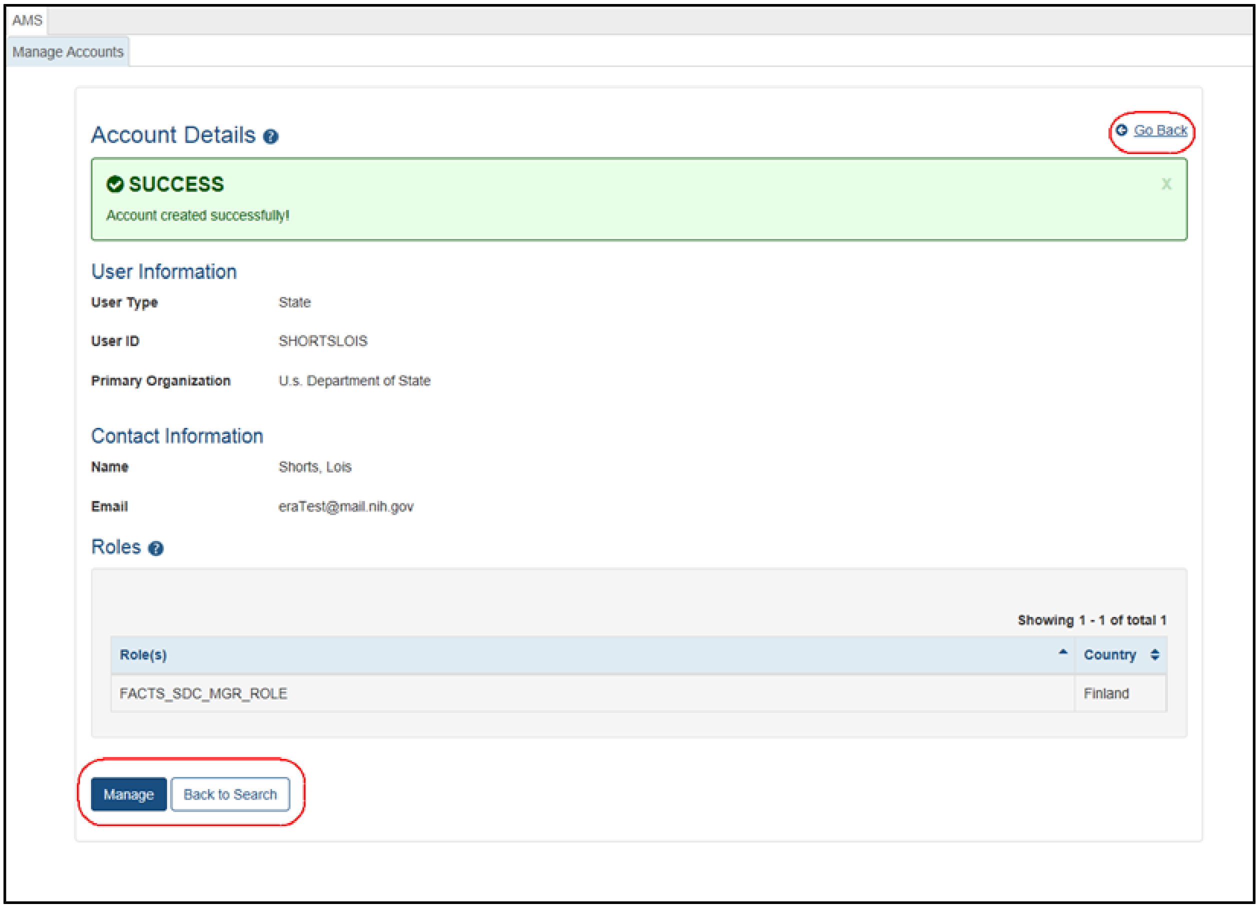


Figure 44: Account Details Screen for State Department Users

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 State Department User Accounts topic.
    c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

5.1.3.1 Add/Delete Countries

NOTE: The Add Countries functionality is for State Department users only.

1. To add a country to the account, click on the **+ Add Countries** button on the *Create Accounts* screen.

Figure 45: Add Countries Button

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

Figure 46: Add Countries Screen

2. To find a country, click in the list of countries and type the first letter of the country's name.
    a. For example, to find the United Kingdom hit the **<U>** key on the keyboard.
3. Highlight the appropriate country name.

When a country name is highlighted, the **Add Countries** button is enabled.

4. Perform one of the following options:
    a. Click the **Close** button to close the screen.
    b. Click the **Add Countries** button to add the selected country.

When the **Add Countries** button is clicked, the selected country to added the *Roles* section on the *Create Account* or *Manage Account* screen.

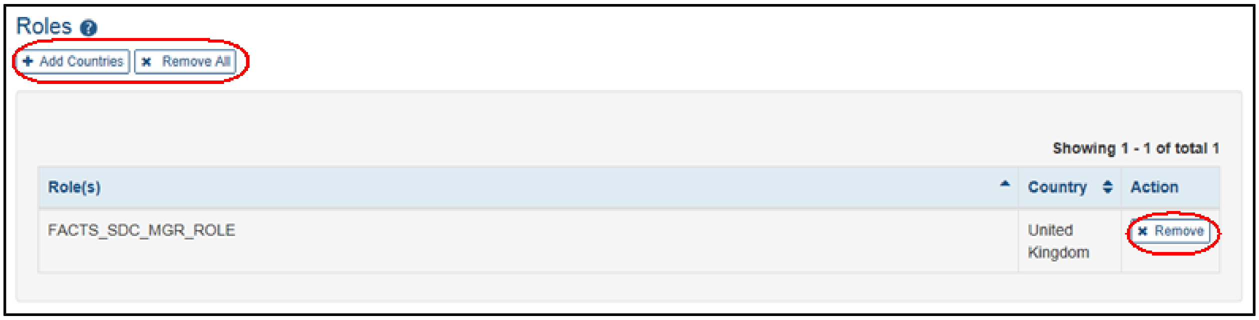


Figure 47: Roles/Add Countries Section on the Create Account Screen

5. To add another country, click the + **Add Countries** button. Repeat the steps above.
6. To remove a country, click the **X Remove** button.
7. To remove all countries, click the **X Remove All** button.

5.1.4 Add/Delete User Roles

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

NOTE: State Department users only - For information on adding countries, please refer to the Add/Delete Countries topic.

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

Figure 48: Add Roles Button on the Create Account Screen

5.1.4.1 Commons Users

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

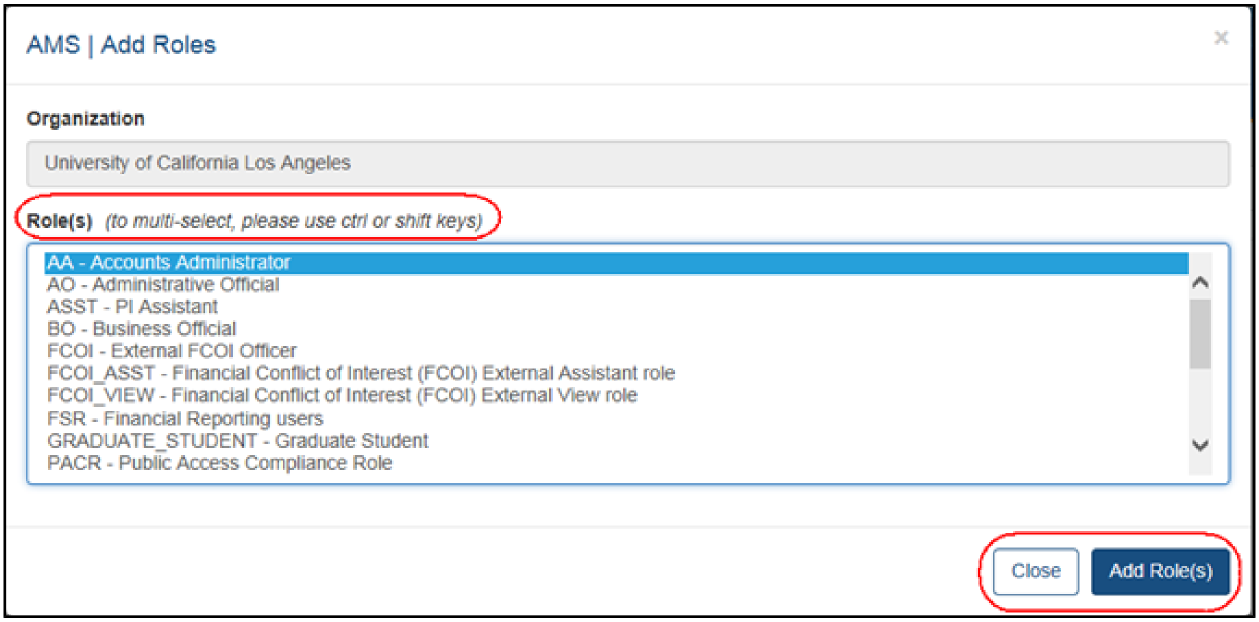


Figure 49: Add Roles Screen for Commons Users

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).

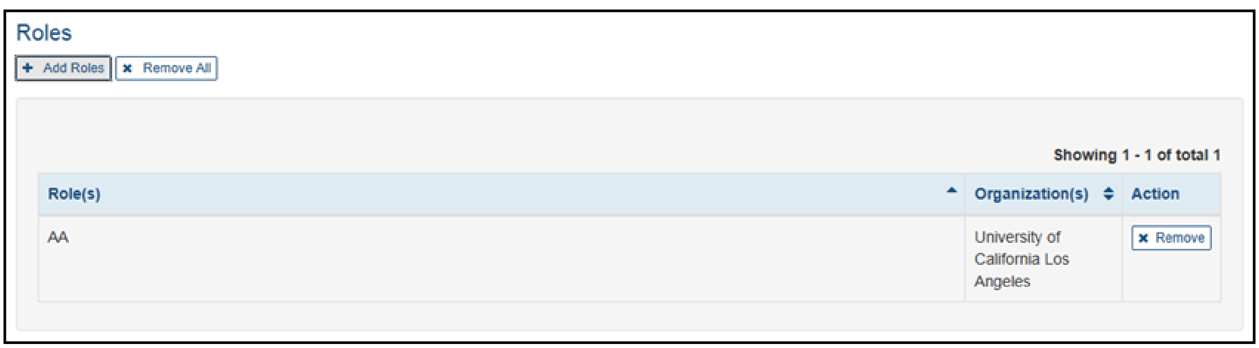


Figure 50: Roles Section on the Create Accounts Screen for Commons Users

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.

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

5.1.4.2 Agency and iEdison Agency/ERL Users

NOTE: For iEdison Agency users the two roles are IDO Admin and IDO User.
For iEdison ERL users the roles are EDI_GMS_CMS_ADMIN and EDI_GMS_CMS_USER.

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

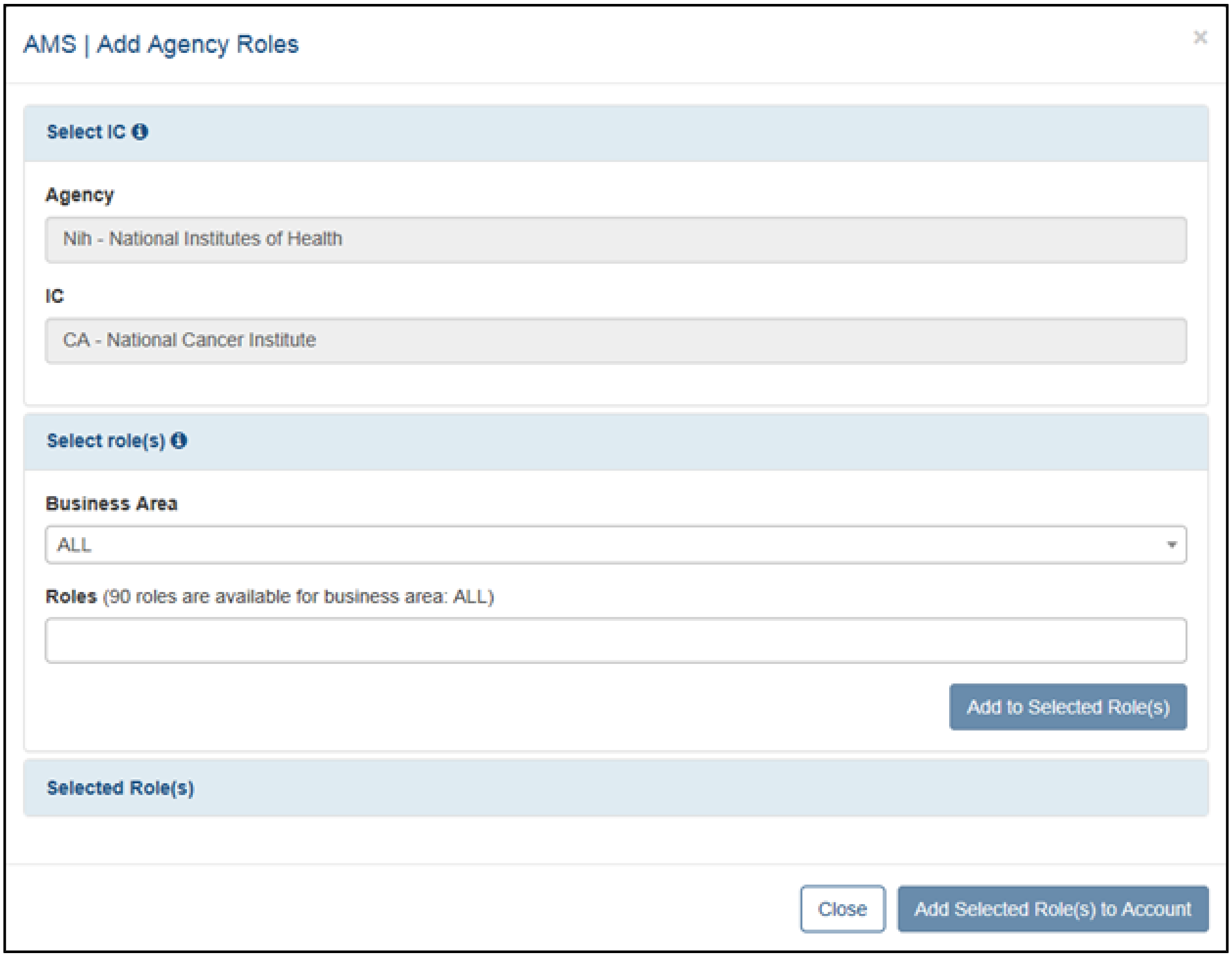


Figure 51: Add Agency Roles Screen for Internal Users

1. Select the appropriate *Business Area* from the drop-down menu or start typing in the text box. For example, start typing "G" to access the GM Business Area roles.

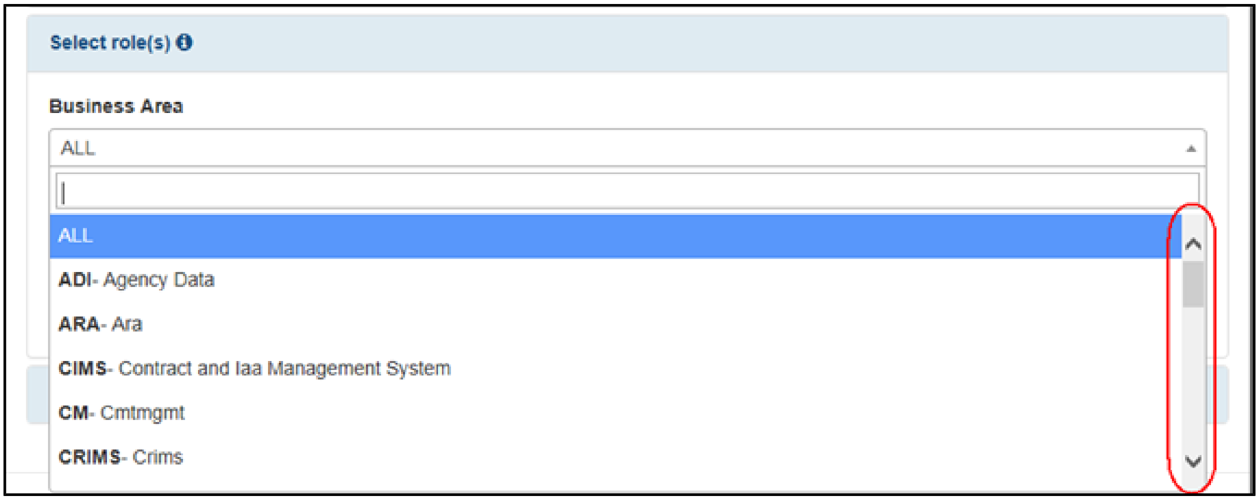


Figure 52: The Business Area Drop-down Menu on the Add Agency Roles Screen

2. Select the appropriate role from the drop-down menu per the *Business Area* selected.

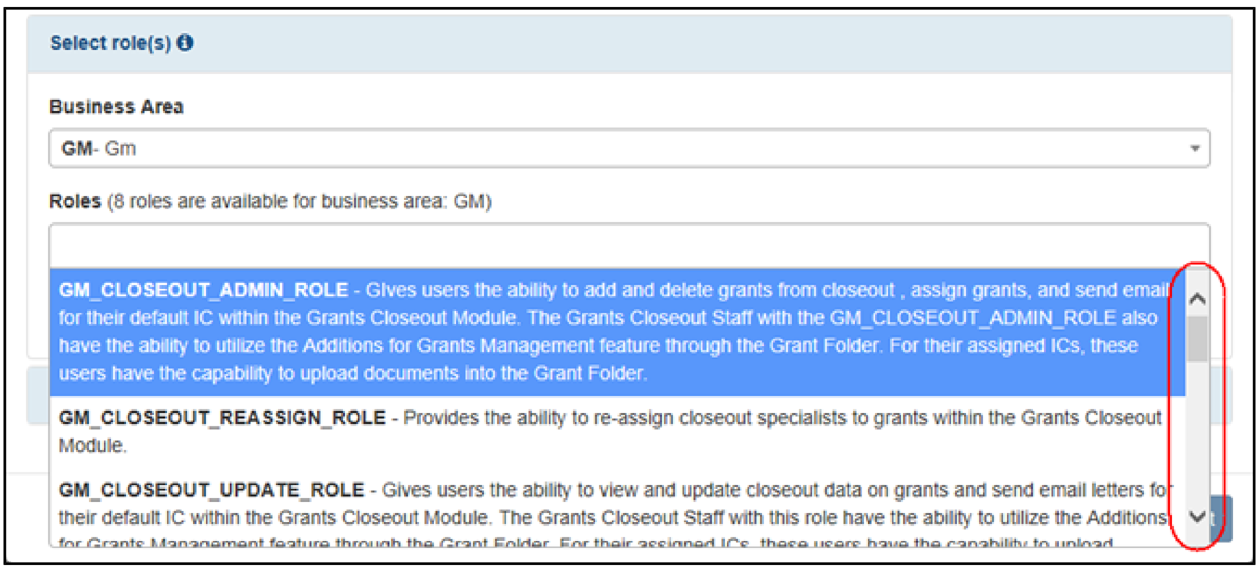


Figure 53: The Role Drop-down Menu on the Add Agency Roles Screen

3. Click the **Add to Selected Role(s)** button .

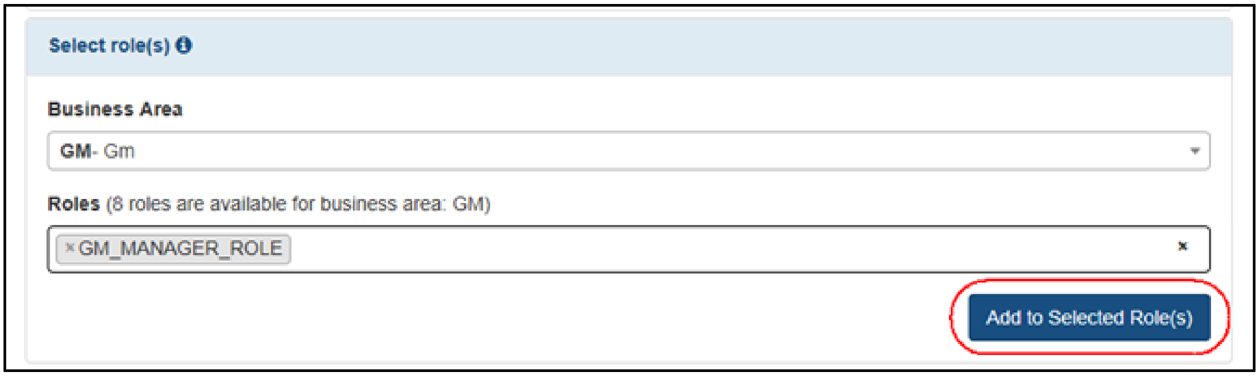


Figure 54: Add Agency Roles Screen Displaying the Add to Selected Role(s) Button

When the **Add to Selected Role(s)** button is clicked, the role is added on the *AMS | Add Roles* screen .

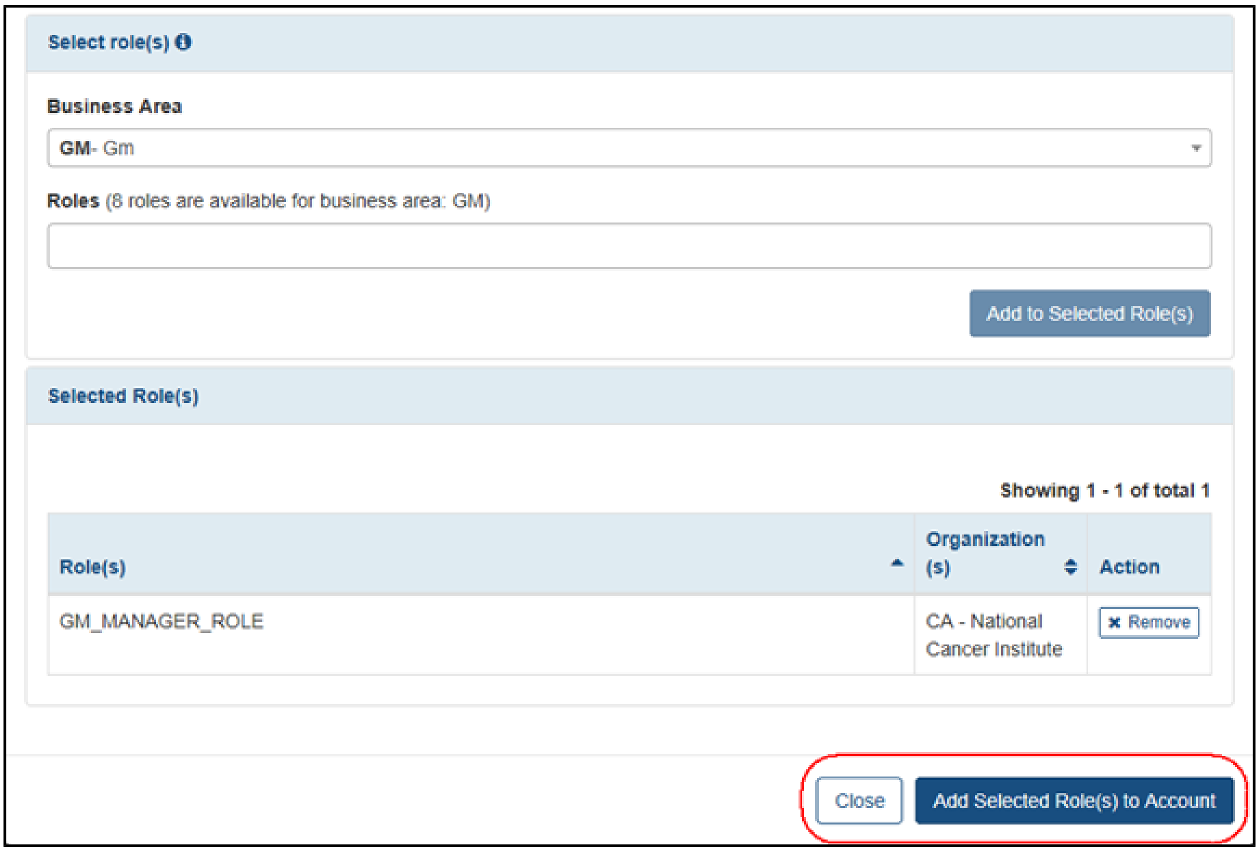


Figure 55: Selected Role(s) Section on the Add Agency Roles Screen

4. To add the role to the account, click the **Add Selected Role(s) to Account** button.

When the **Add Selected Role(s) to Account** button is clicked, the added role is displayed on the *Create Accounts* or *Manage Account* screen.

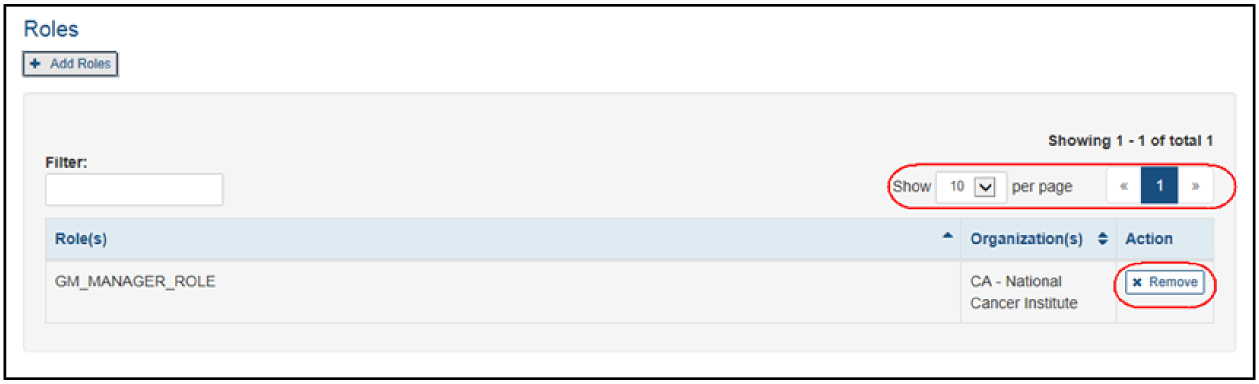


Figure 56: Roles Section on the Create Accounts Screen

5. To add additional roles, click the **+ Add Roles(s)** button. Repeat the above steps.
6. To remove a role click the appropriate **Remove** button in the **Action** column.

NOTE: Multiple roles can be added at the same time.

---

7. To add multiple roles, start typing a head in the **Roles** text box.
   a. For example, start typing *G* to access the GM Business Area roles.
8. Select the appropriate role for that Business Area.
9. Start typing a head the next desired Business Area such as *IPF*.

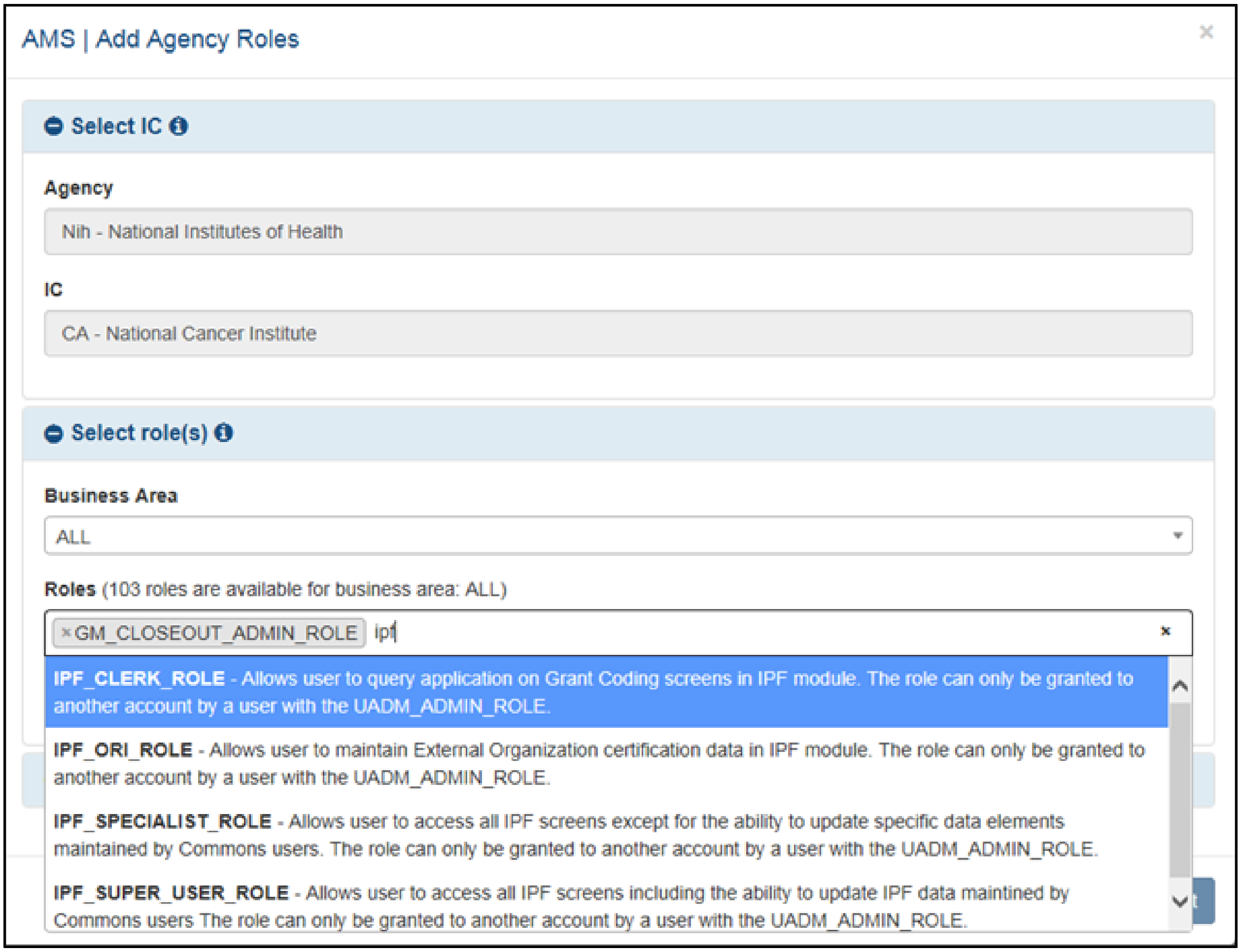


Figure 57: Add Agency Roles Screen Displaying Adding Multiple Roles

10. Select the next appropriate role.

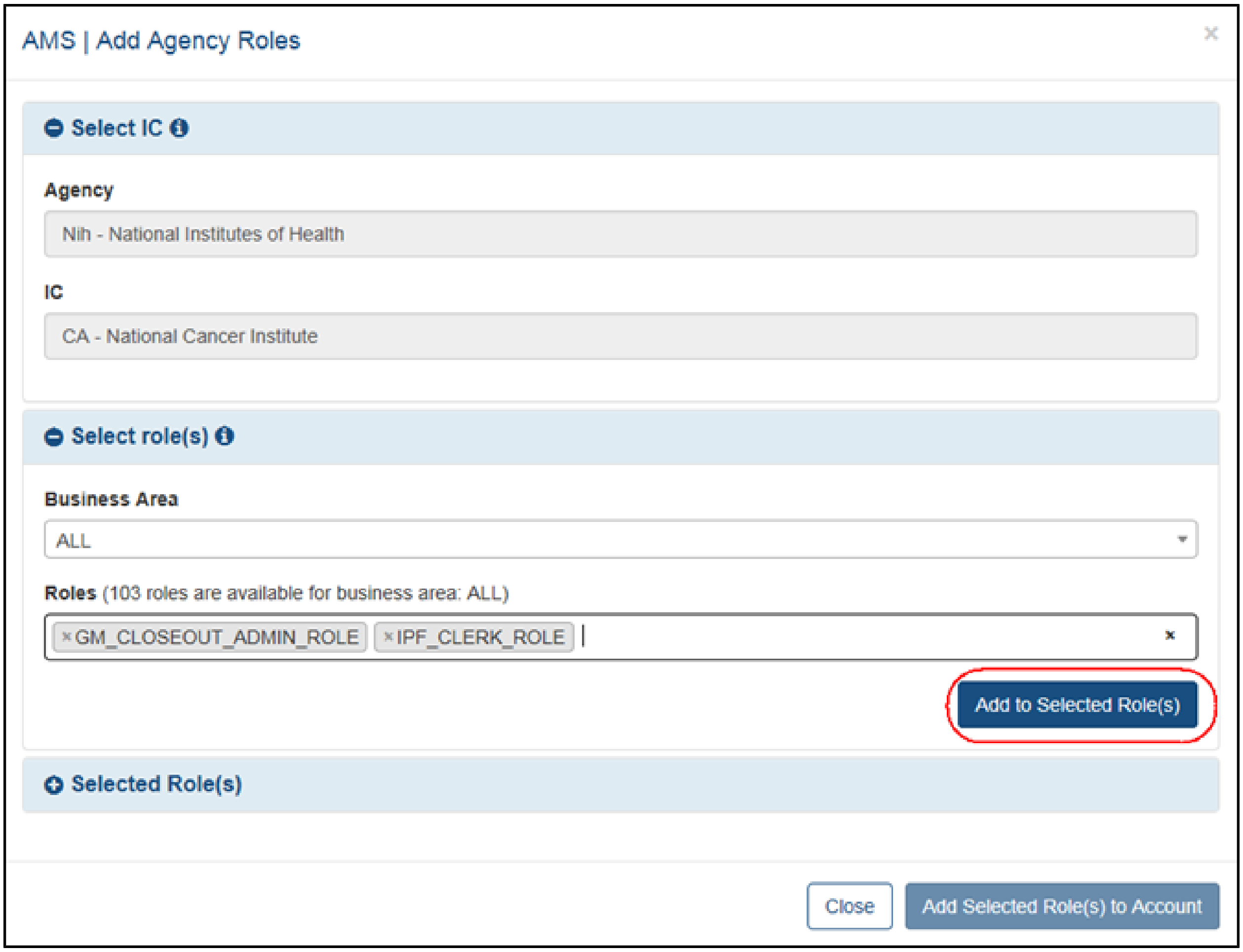


Figure 58: Add Agency Roles Screen Displaying the Add to Selected Role(s) Button

11. Click the **Add to Selected Role(s)** button to add the selected roles.

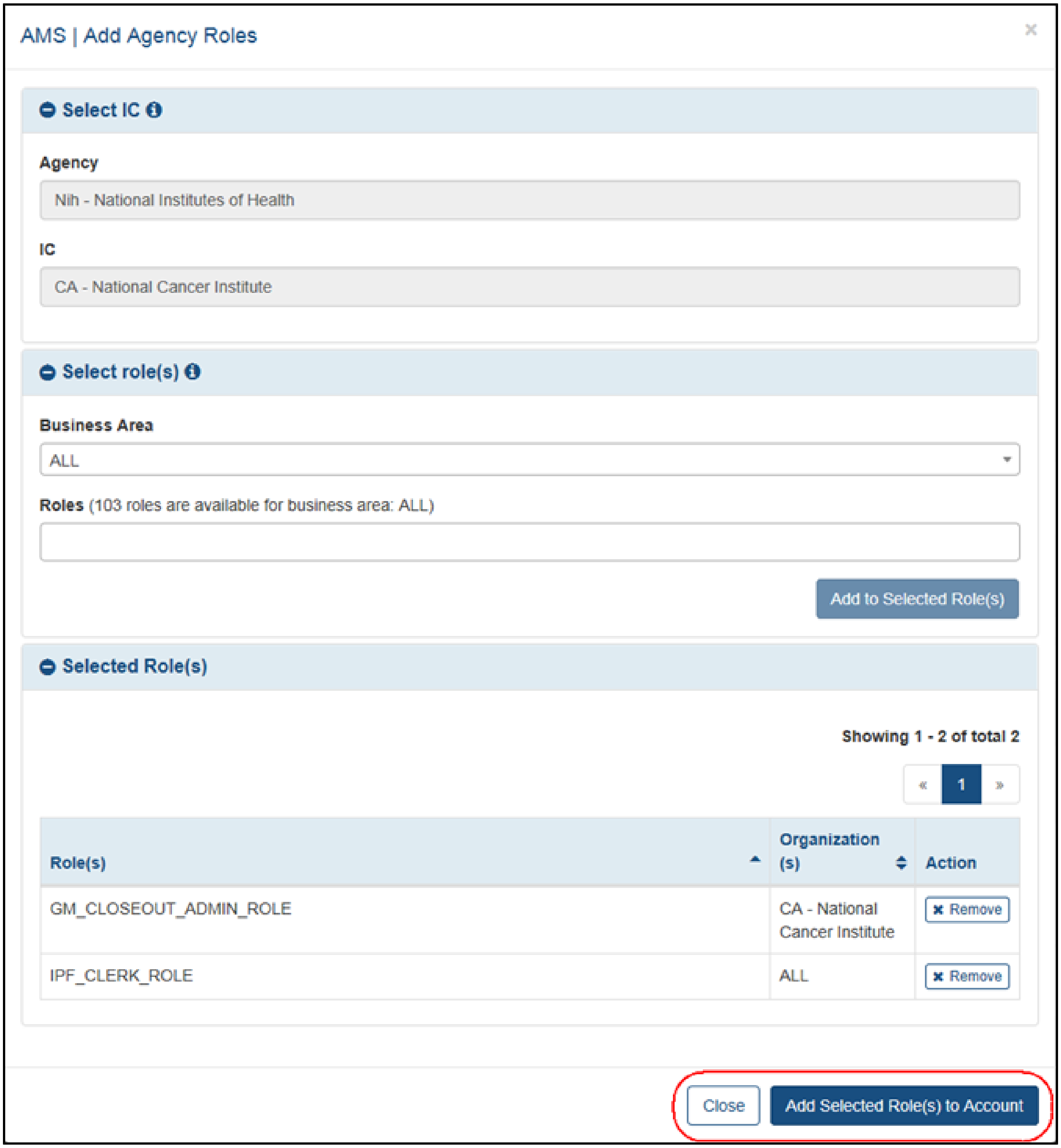


Figure 59: Add Agency Roles Screen Displaying the Add Selected Role(s) to Account Button

12. Click the **Add Selected Role(s) to Account** button.

When the **Add Selected Role(s) to Account** button is clicked, the added role is displayed on the *Create Accounts* or *Manage Account* screen.

5.1.4.3 External iEdison Users

When the + **Add Roles** button is clicked on the *Create Account* or *Modify Account* screen, the pop-up *Add Roles* screen displays.

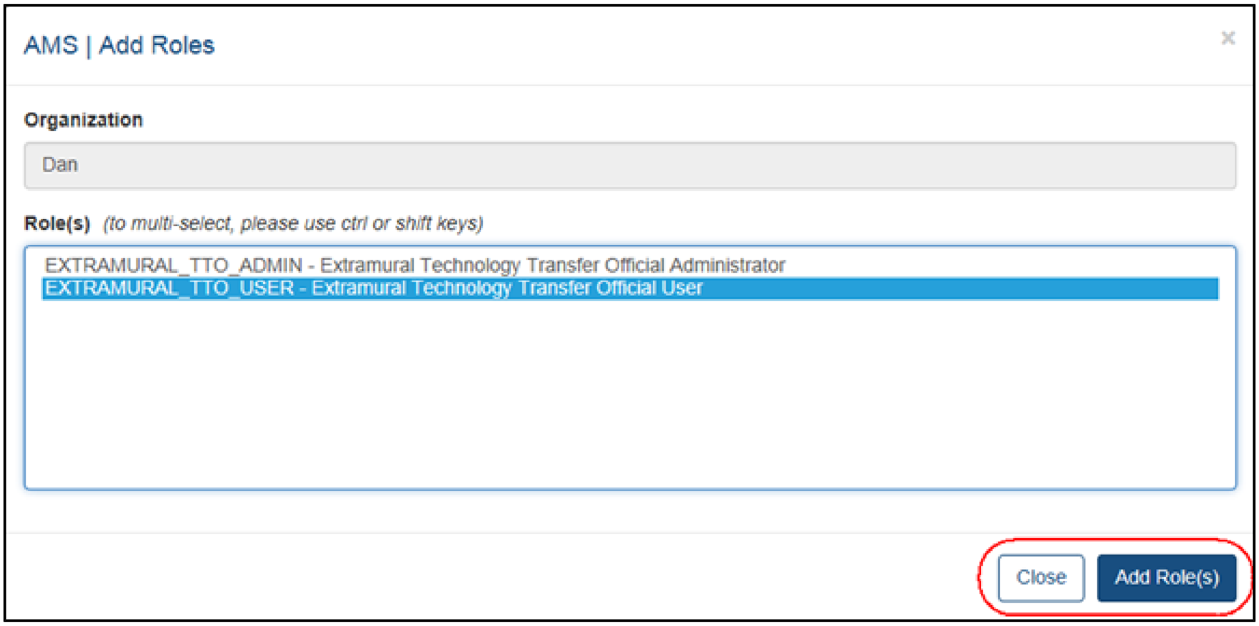


Figure 60: Add Roles Screen for External iEdison Users

1. Select the appropriate role.
2. Click the **Add Roles(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).

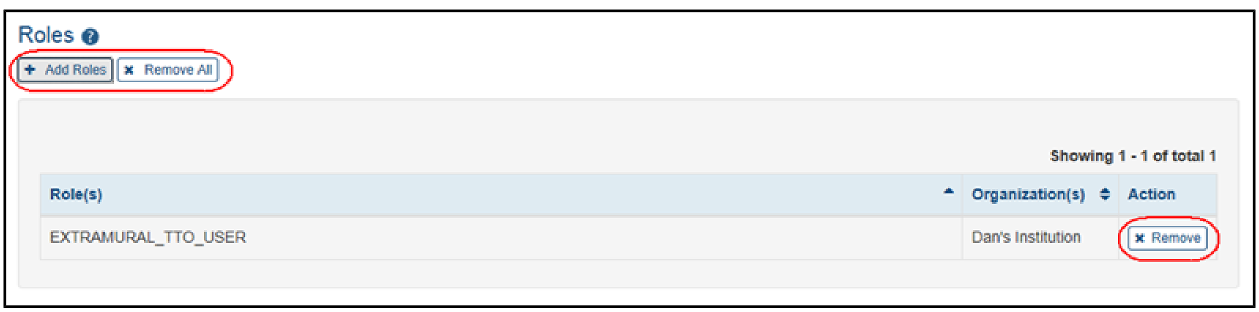


Figure 61: Roles Section on the Create Accounts Screen for External iEdison Users

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.

5.1.5 Add/Delete Initial Review Group (IRG) Clusters

NOTE: Adding and deleting IRG Clusters is for **internal Agency** users only.

1. To add a cluster click the **+ Add Clusters** button on the *Create Accounts* or *Manage Account* screen.

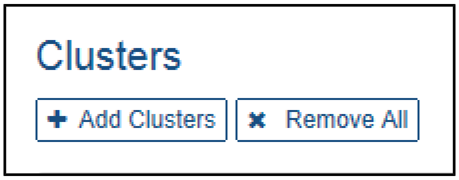


Figure 62: Clusters Buttons

When the + **Add Clusters** button is clicked, the pop-up *Add Clusters* screen is displayed.

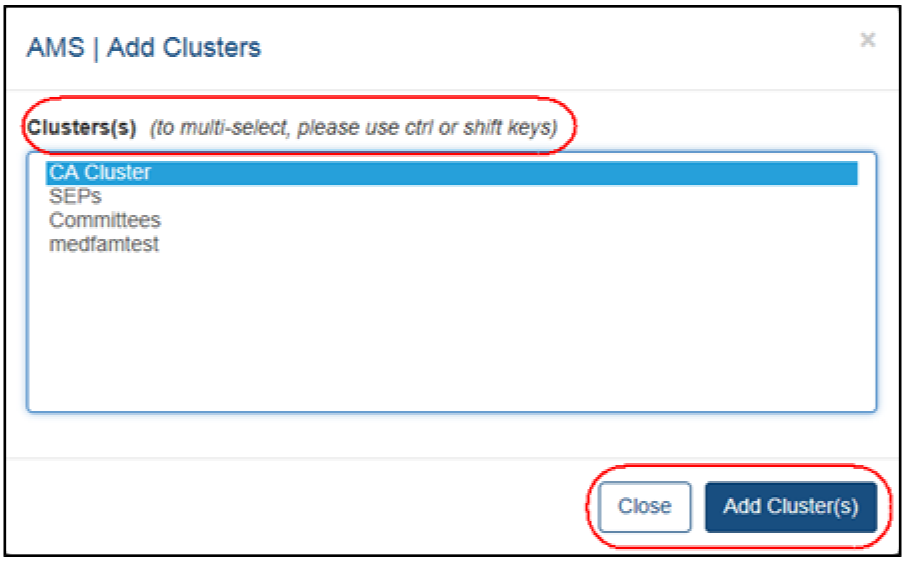


Figure 63: AMS | Add Clusters Screen

2. To add a cluster, highlight the appropriate cluster(s).
3. Click the **Add Cluster(s)** button.

When the **Add Cluster(s)** button is clicked, the cluster(s) is added to the *Clusters* section on the *Create Account* or *Manage Account* screen.

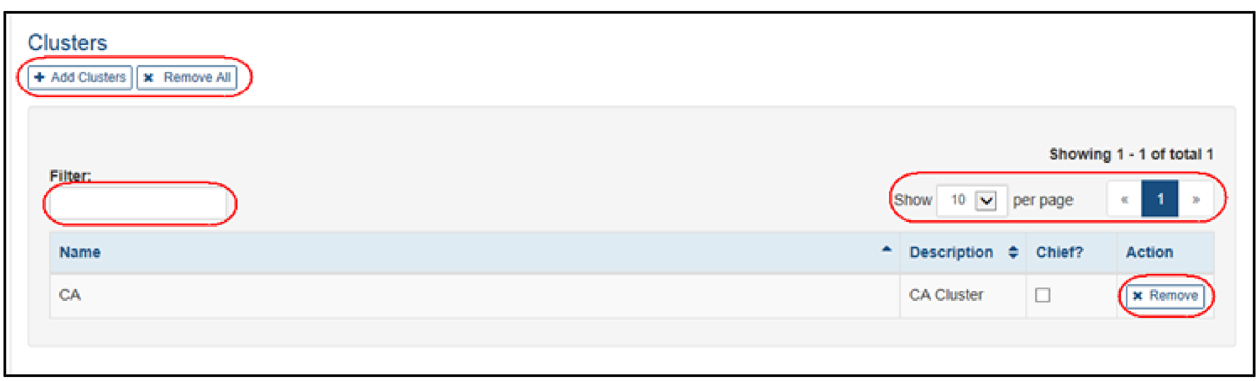


Figure 64: Clusters Section on the Create Account Screen

4. To add additional clusters, click the **+ Add Clusters** button. Repeat the steps above.
5. To remove all clusters click the **Remove All** button.
6. To filter the cluster list, type the appropriate text in the **Filter:** text box.
7. To navigate through the cluster list, perform any one of the following options:
    a. Click the appropriate Page Number.
    b. Click the **right double** arrows to go to the end of the list.
    c. Click the **left double** arrows to go to the beginning of the list.
8. To indicate that the person is the cluster Chief, select the appropriate check box in the **Chief?** column.
9. To remove a cluster click the appropriate **Remove** button in the **Action** column.

5.1.6 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, etc.

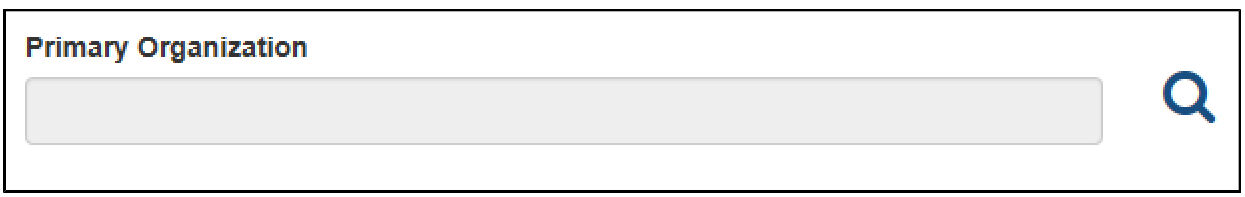


Figure 65: Primary Organization Field

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 displays.

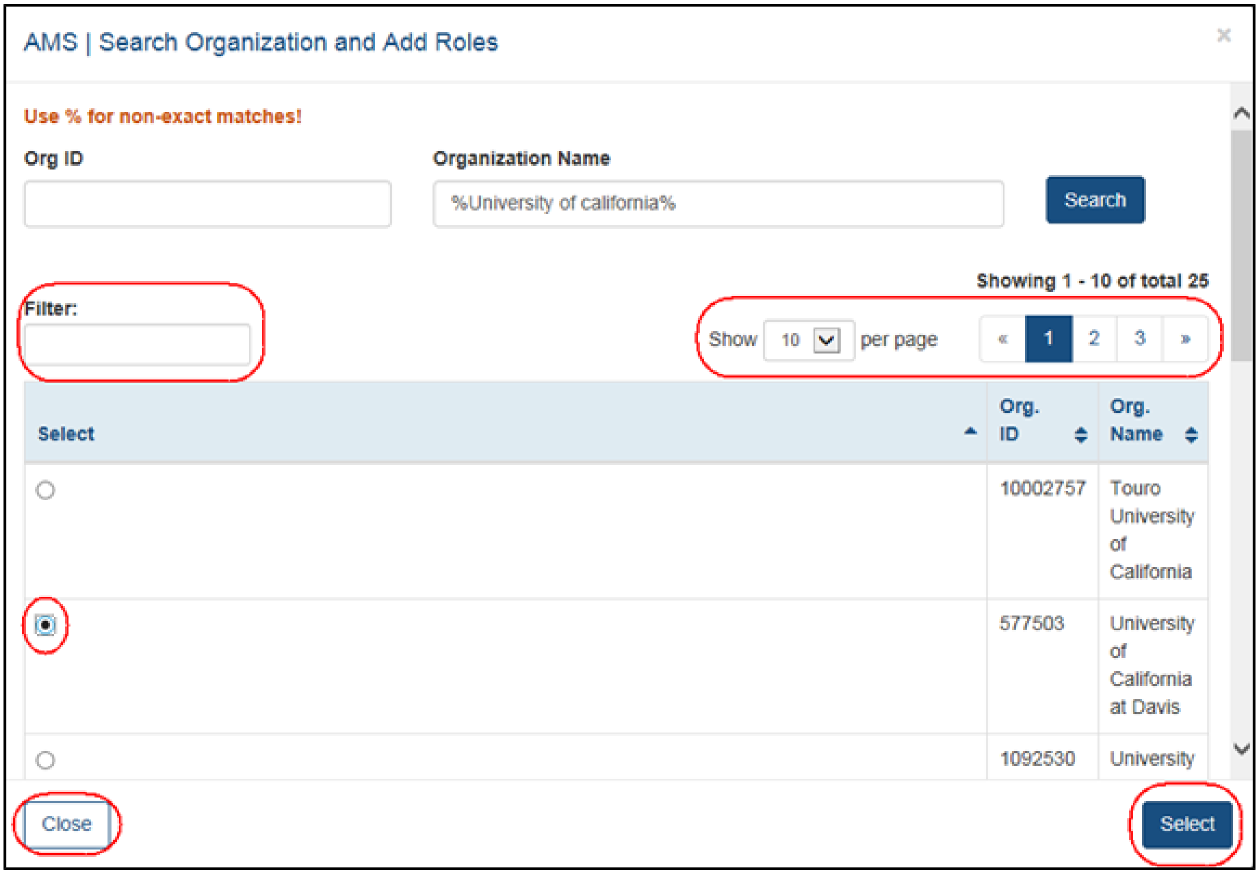


Figure 66: Search Organization and Add Roles Screen

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. Please refer to the Create Commons User Accounts or the Create Agency User Accounts topics.

5.2 Create System Accounts

Creating system accounts can be performed by Commons, Agency, and external iEdison users.

NOTE: iEdison Agency/ERL and State Department users cannot create system accounts.

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

- Section 2.4.1 for Agency users - internal Agency users should contact their IC Coordinator to register the certificate; the IC Coordinator is the only one who is authorized to register the certificate
- Section 2.4.2 for iEdison users - only users with the TTO Admin user role have the privileges necessary to register the certificate in AMS; iEdison users must work with their TTO Admin user to register their certificate
- 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

1. To create a system account, perform a search first.
   a. Please refer to the Search System Accounts topic.

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

---

2. To create a system account, click the **Create New Account** button located below the search results.

When the **Create New Account** button is clicked, the *Create Account* screen displays.

3. Select *System* for **User Type**.

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

Here is a sample *Create Account* screen with the fields completed.

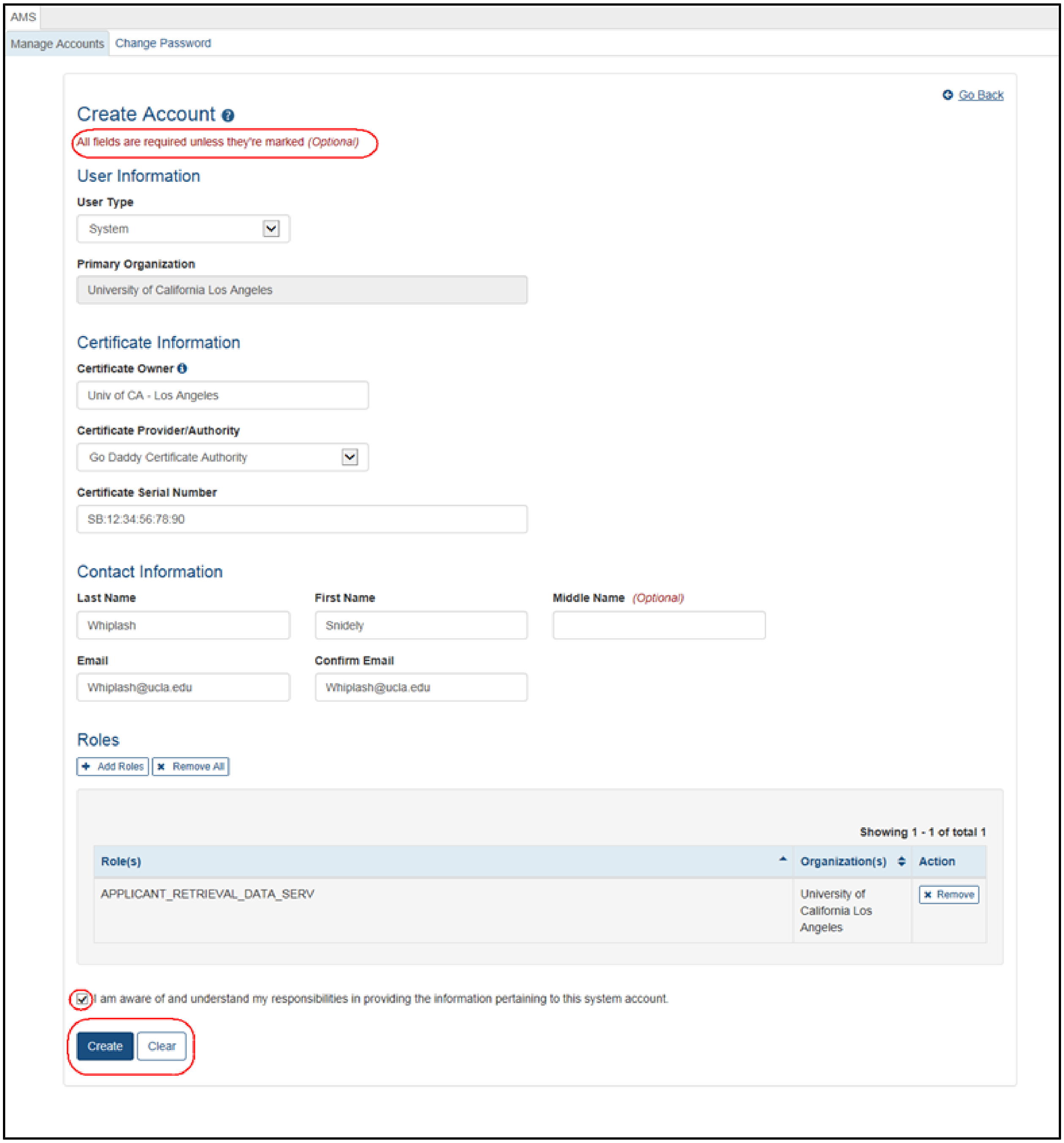


Figure 67: Create Account Screen Displaying Creating a System Account

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

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

---

7. Complete the **Contact Information**.
8. Click the **+ Add Roles** button to add the appropriate role(s).
    a. Note the role description on the screen when adding a role.
    b. See the Add System Roles topic for more information.
9. 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*.

10. Perform one of the following options:
    a. Click the **Create** button to create the account.
    b. Click the **Clear** button to clear the fields on the screen.

The system performs validations when the **Create** button is clicked. If there are no error messages, then the system displays the *Account Details* screen with the following message: *Account created successfully!*

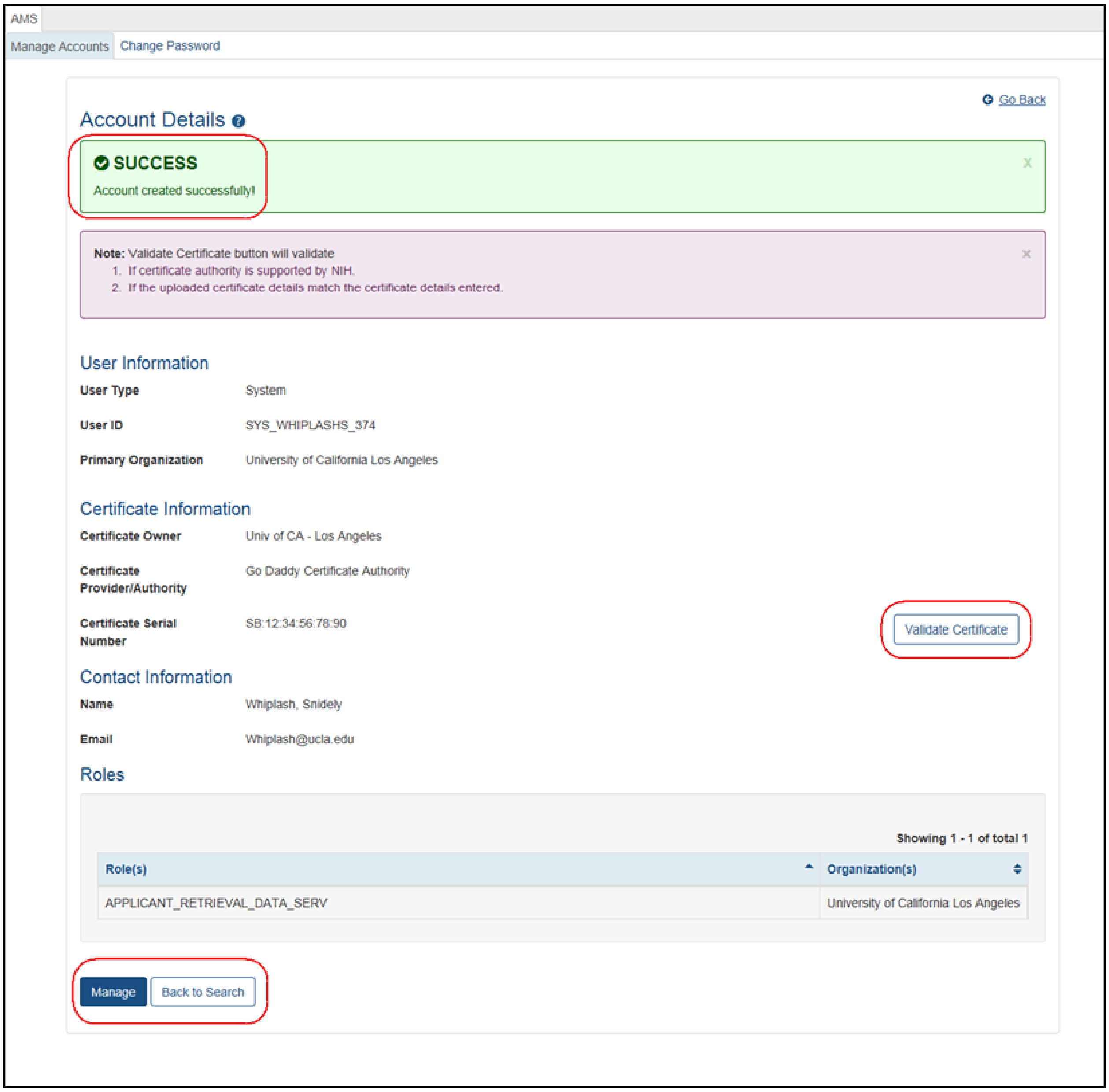


Figure 68: Create Account Screen Displaying Account Created Message

11. Click the **Validate Certificate** button to validate the certificate.
    a. See the Validate Certificate topic for more information.
12. Click the **Manage** button to make any additional changes.
    a. See the Manage System Accounts topic for more information.
13. Click the **Back to Search** button to return to the *Search Account* screen.

5.2.1 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.

Figure 69: 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

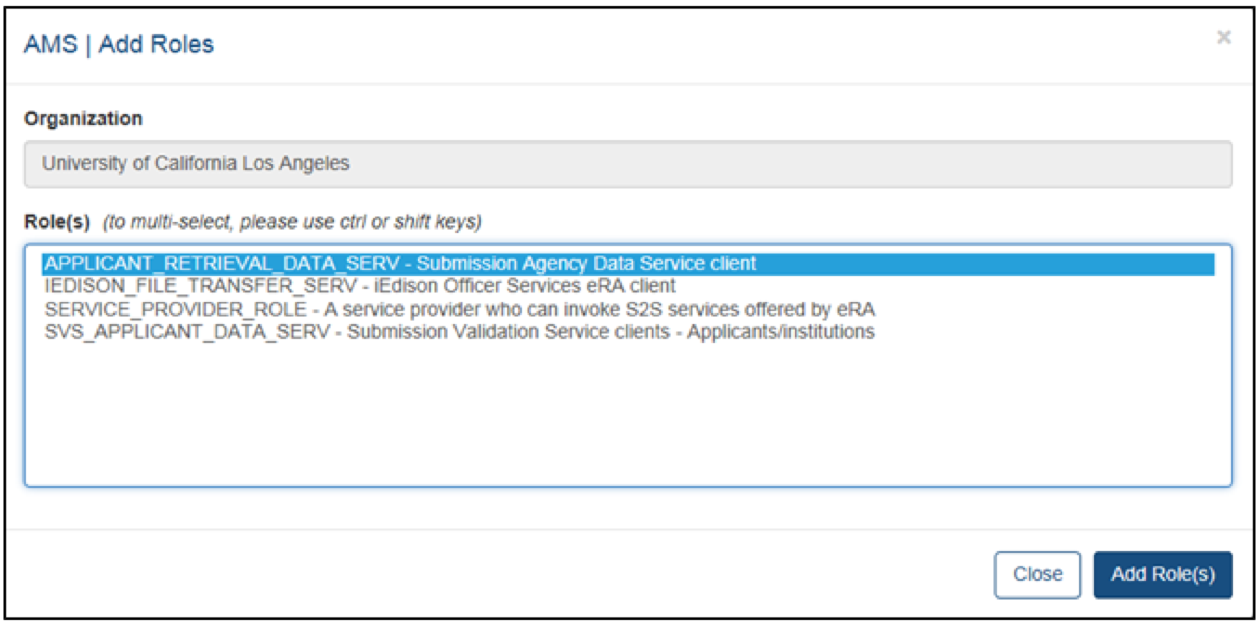


Figure 70: Add Roles Screen for External System Roles

Agency System Roles

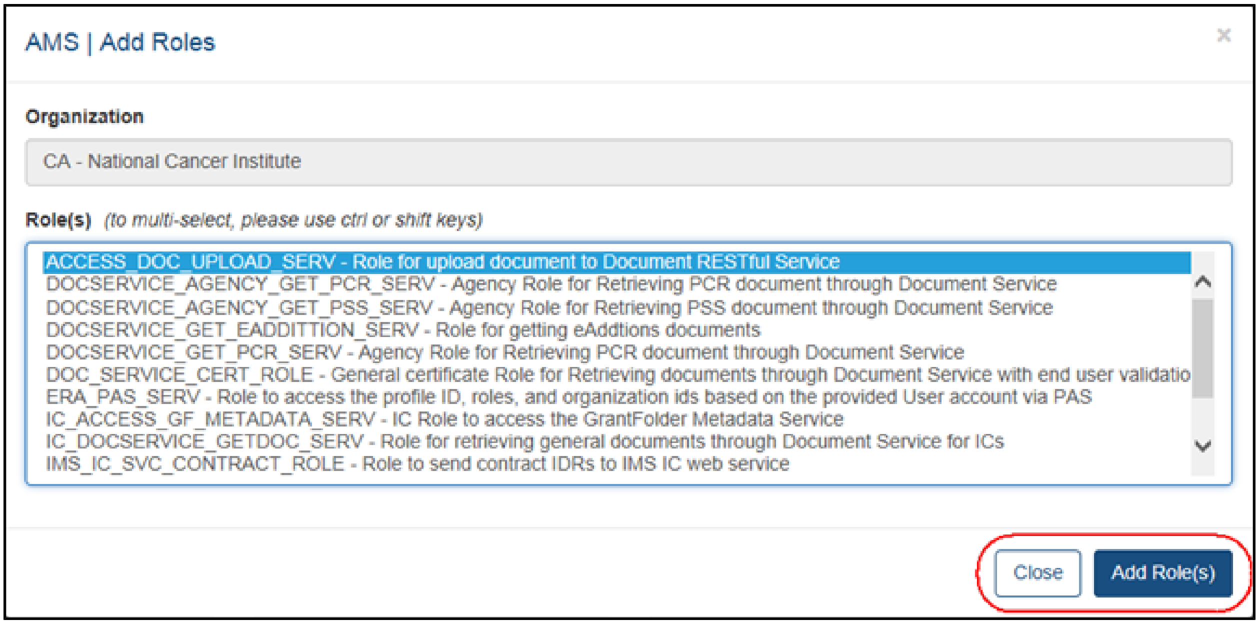


Figure 71: Add Roles Screen Displaying Agency System Roles List

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).

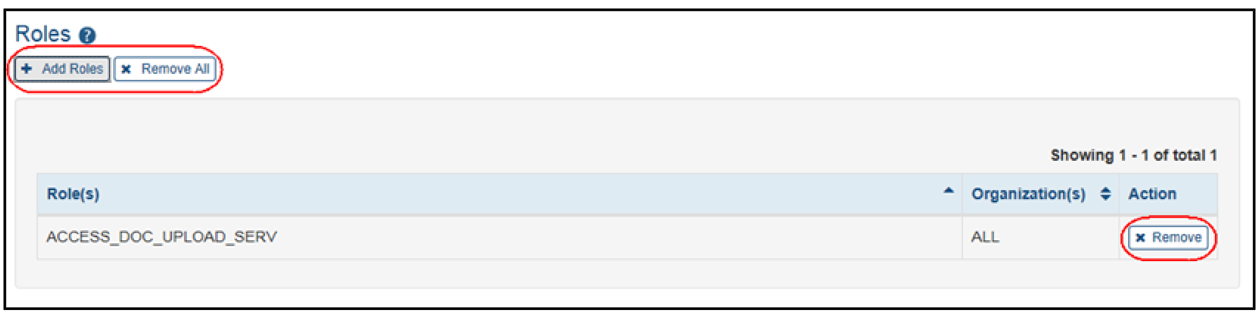


Figure 72: Roles Section on the Create Accounts Screen for Agency Users

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.

5.2.2 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.

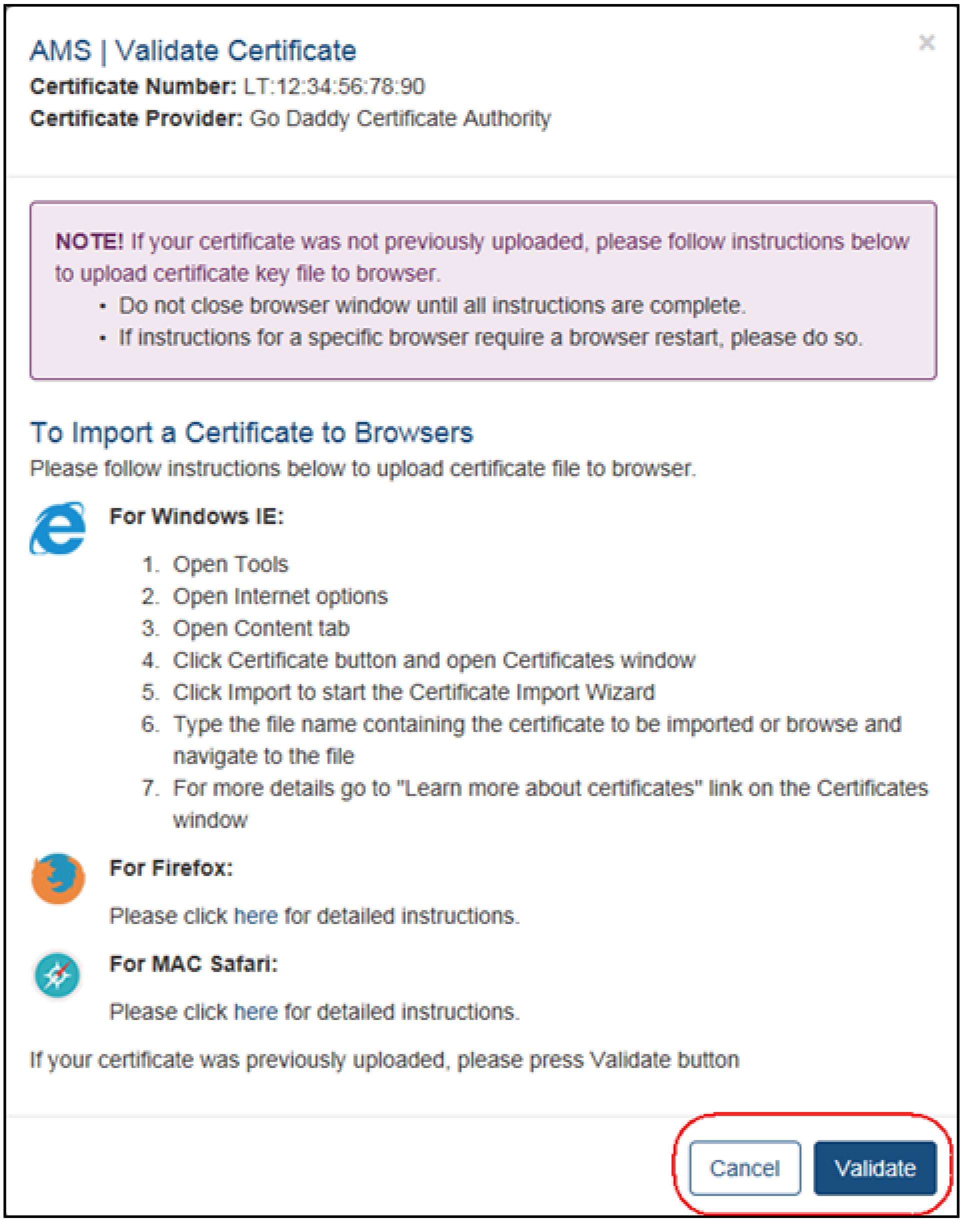


Figure 73: Validate Certificate Screen

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 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.

Please information on Validate Certificate error messages, please refer to the Error Messages topic.

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.*

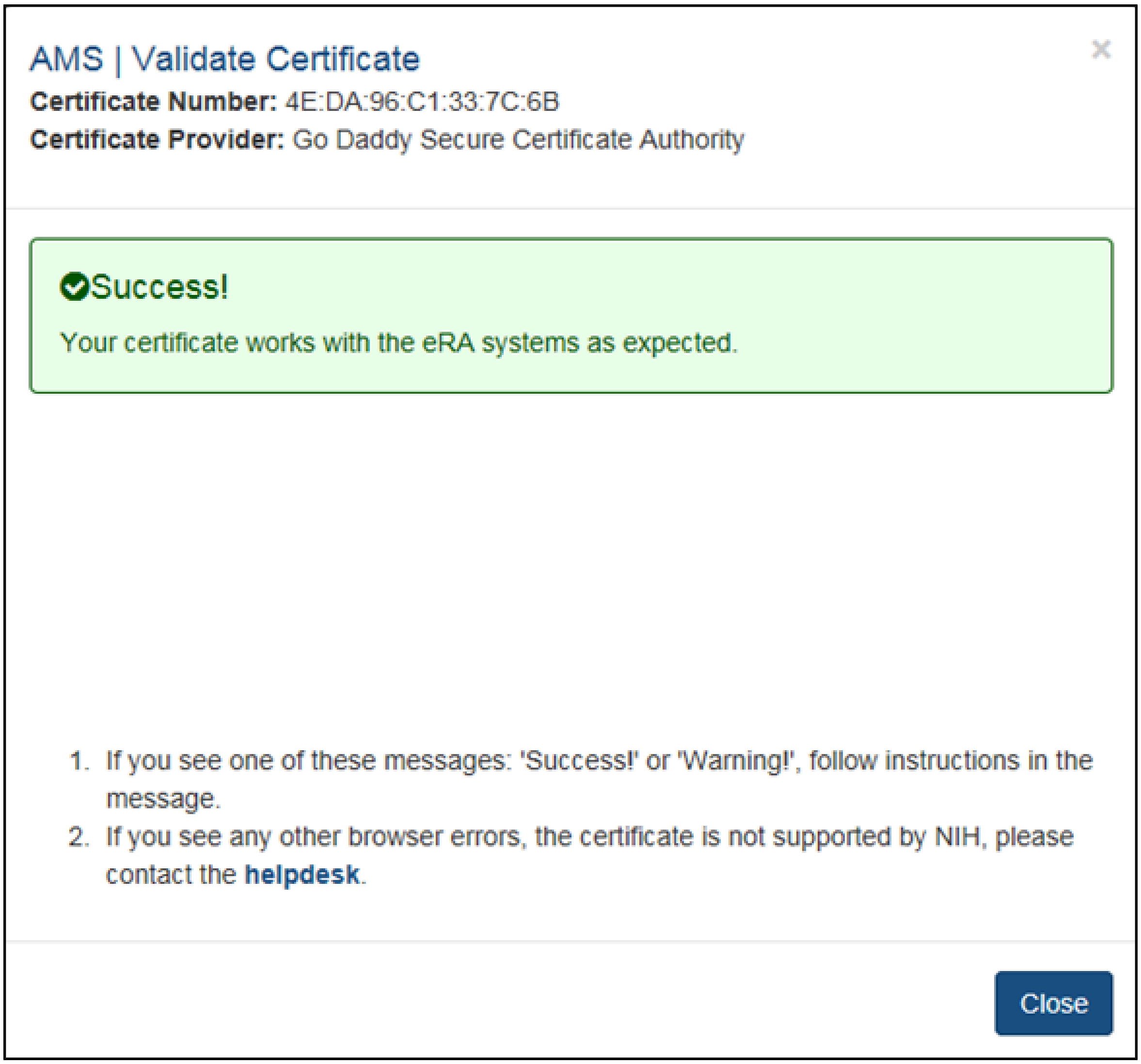


Figure 74: Validate Certificate Screen Displaying the Success Message

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

6 Manage Accounts

6.1 User Accounts

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

- Manage Commons and external iEdison User Accounts
- Manage Agency and iEdison Agency/ERL User Accounts
- Manage State Department User Accounts

6.2 System Accounts

Modifying system accounts can be performed by external and internal (Agency) users.

- Manage System Accounts

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

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

6.3 User Accounts

6.3.1 Manage Agency and iEdison Agency/ERL User Accounts

1. Perform one of the following steps to edit an 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 is displayed.

Here is the *Manage Account* screen with a non-affiliated account with an Agency or Institute.

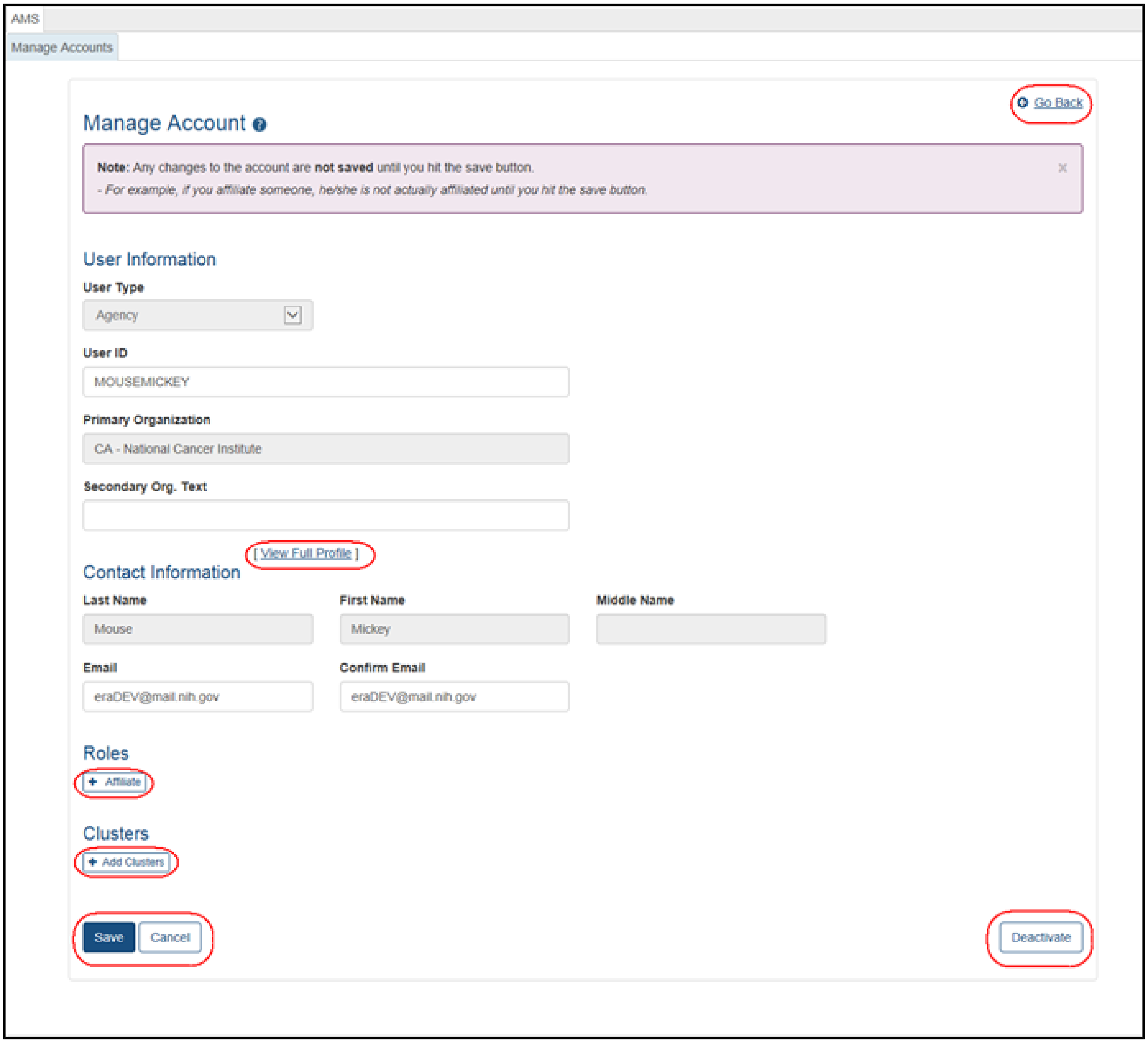


Figure 75: Manage Account Screen Displaying a Not Affiliated Account

Here is the *Manage Account* screen with an affiliated account with an Agency or Institute.

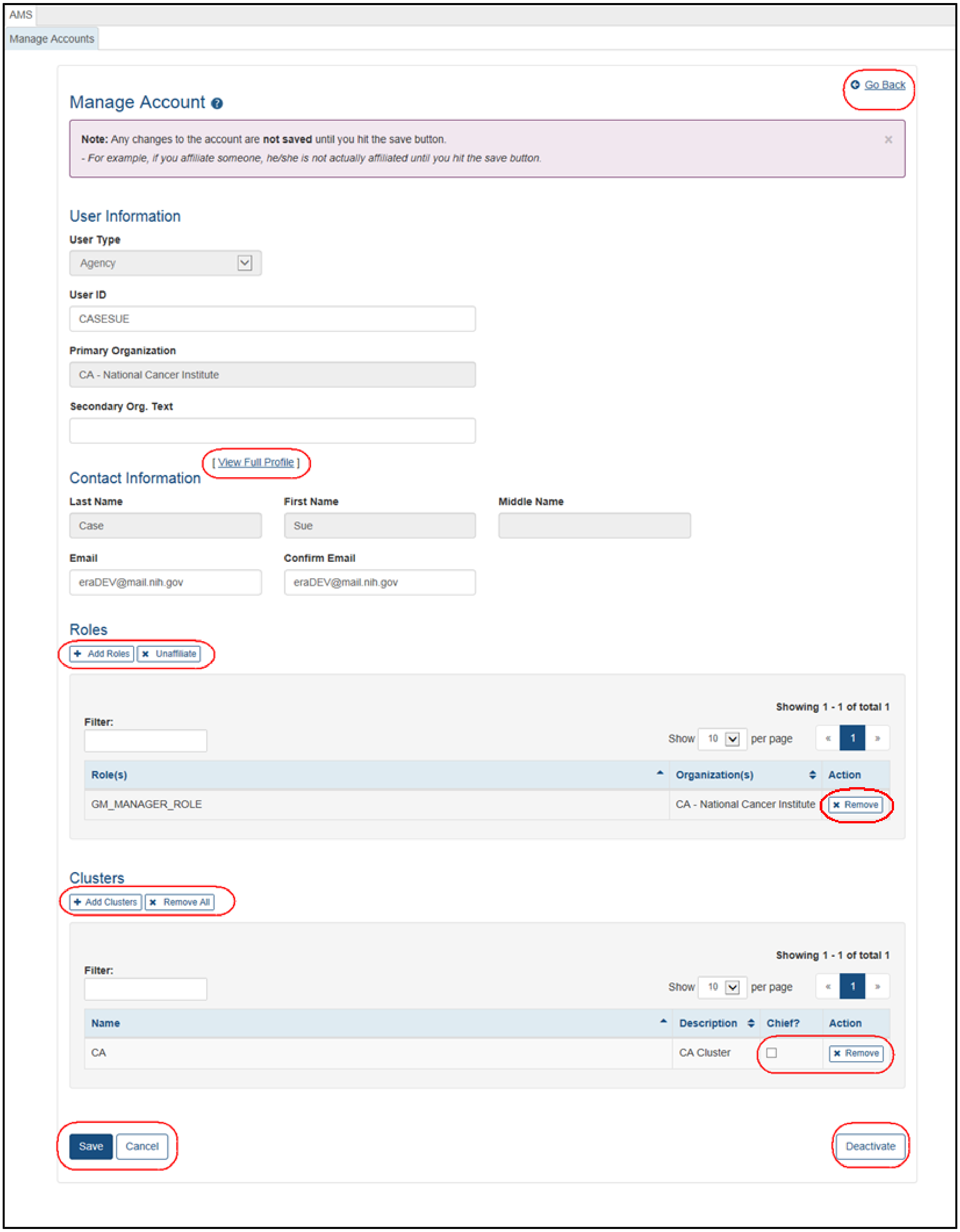


Figure 76: Manage Account Screen with an Affiliated Account

NOTE: Fields grayed out cannot be edited.

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.

NOTE: Users with the AA or SO role may create an affiliation for their organization only.

Perform one or more of the following steps :

1. To view the profile, click the **View Full Profile** hyperlink.
    a. Please refer to the Person Administration topic in the Person Search online help for more information.
2. Edit the **Email** addresses, if necessary.
3. To add roles click the **Add Roles** button.
    a. For more information, please refer to the Add Roles topic.
4. To affiliate an account with an agency or IC, click the **Affiliate** button.
    a. For more information, please refer to the Affiliate Account topic.
5. To unaffiliate a PI, click the **Unaffiliate** button.
6. To deactivate an account, click the **Deactivate** button.
    a. For more information, please refer to the Unaffiliate Account topic.
7. Perform one of the following options:
    a. Click the **Save** button to save the changes.
    b. Click the **Cancel** button to clear the fields.

When the **Save** button is clicked, the system displays the following message on the *Account Details* screen: *Account was updated successfully!*.

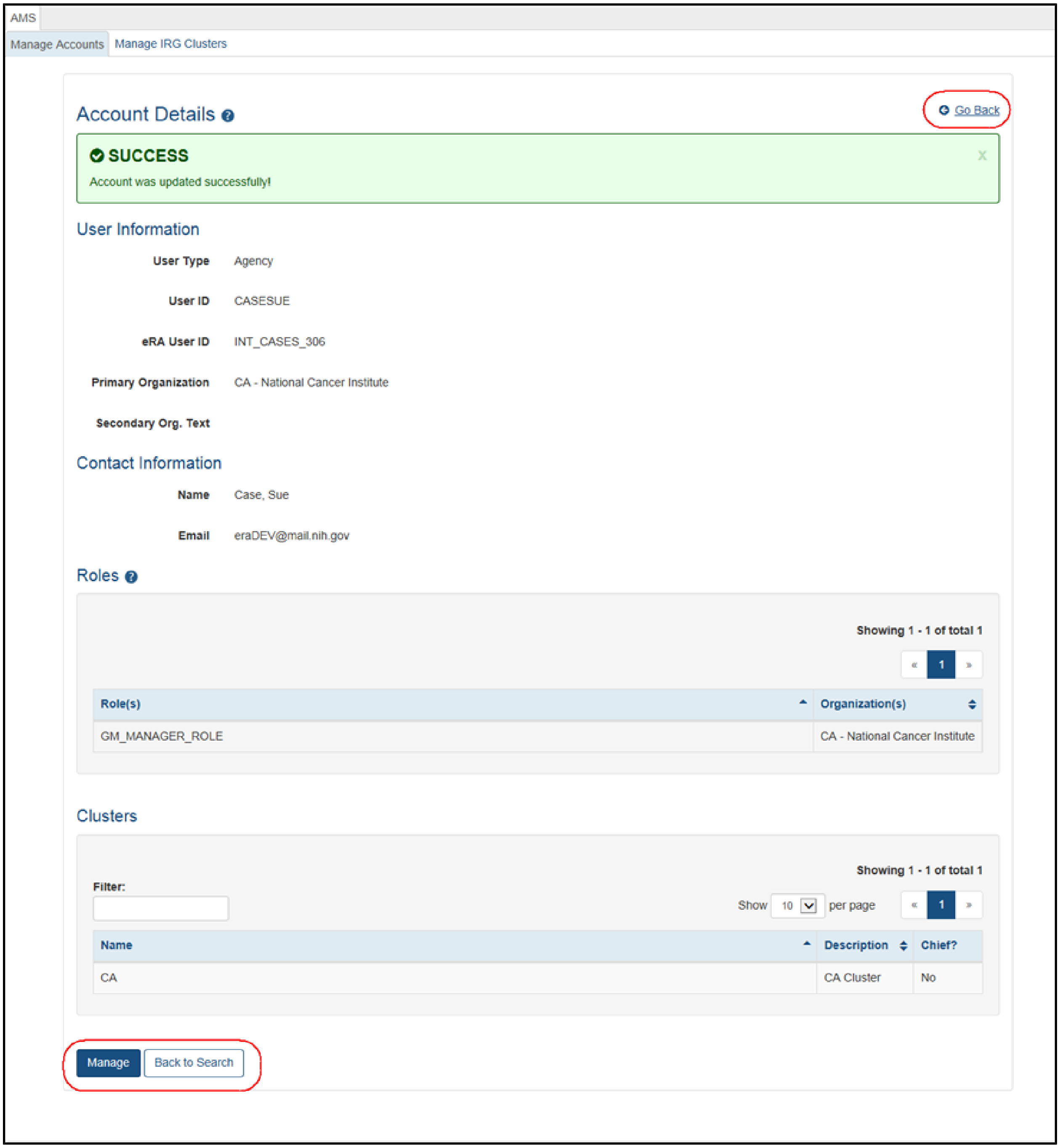


Figure 77: Account Details Screen Displaying Successful Message

8. 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.

6.3.2 Manage Commons and External iEdison User Accounts

NOTE: Managing Commons user accounts is also applicable to external iEdison 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 edit an 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 is displayed.

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

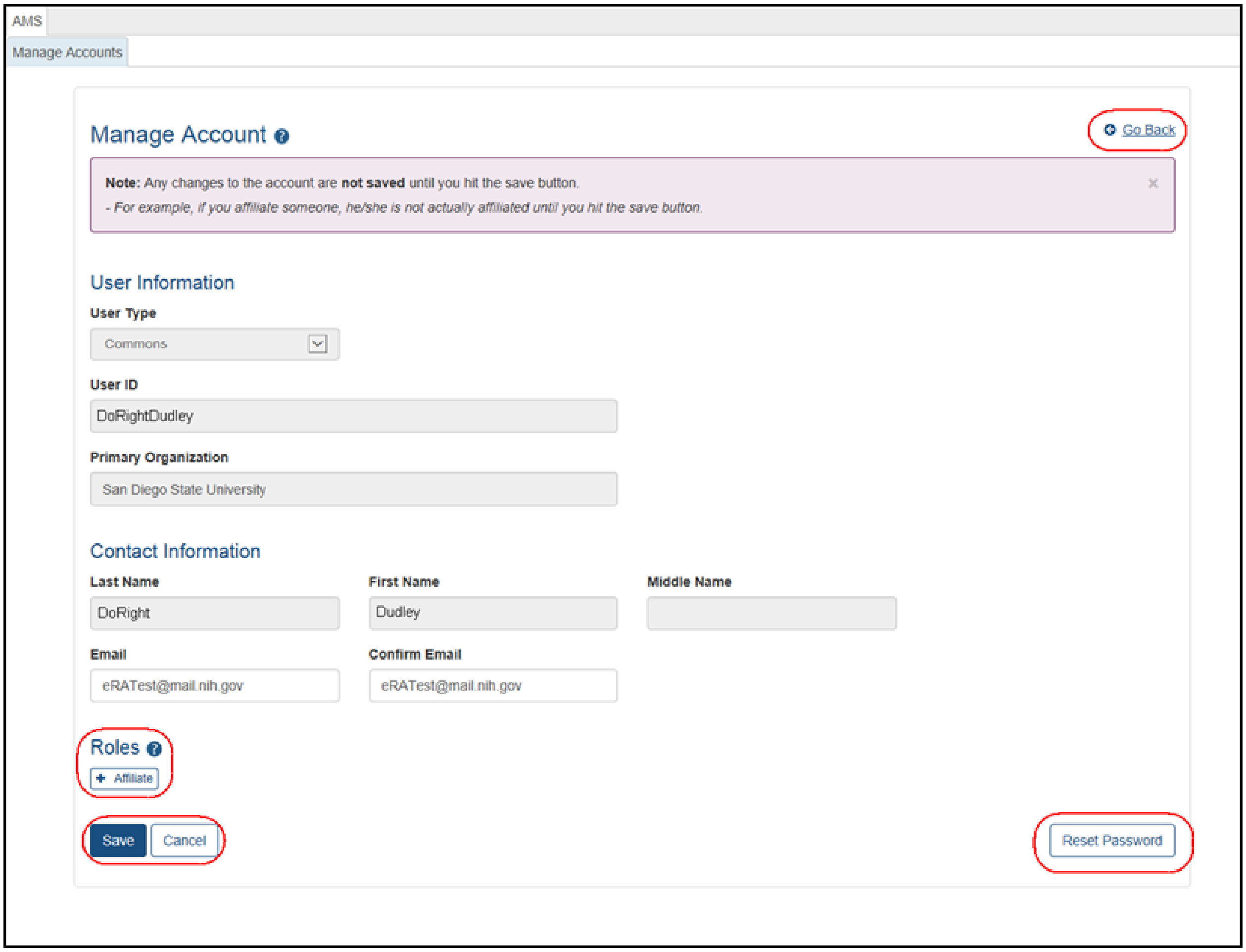


Figure 78: Manage Account Screen Displaying a Non-affiliated User Account

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

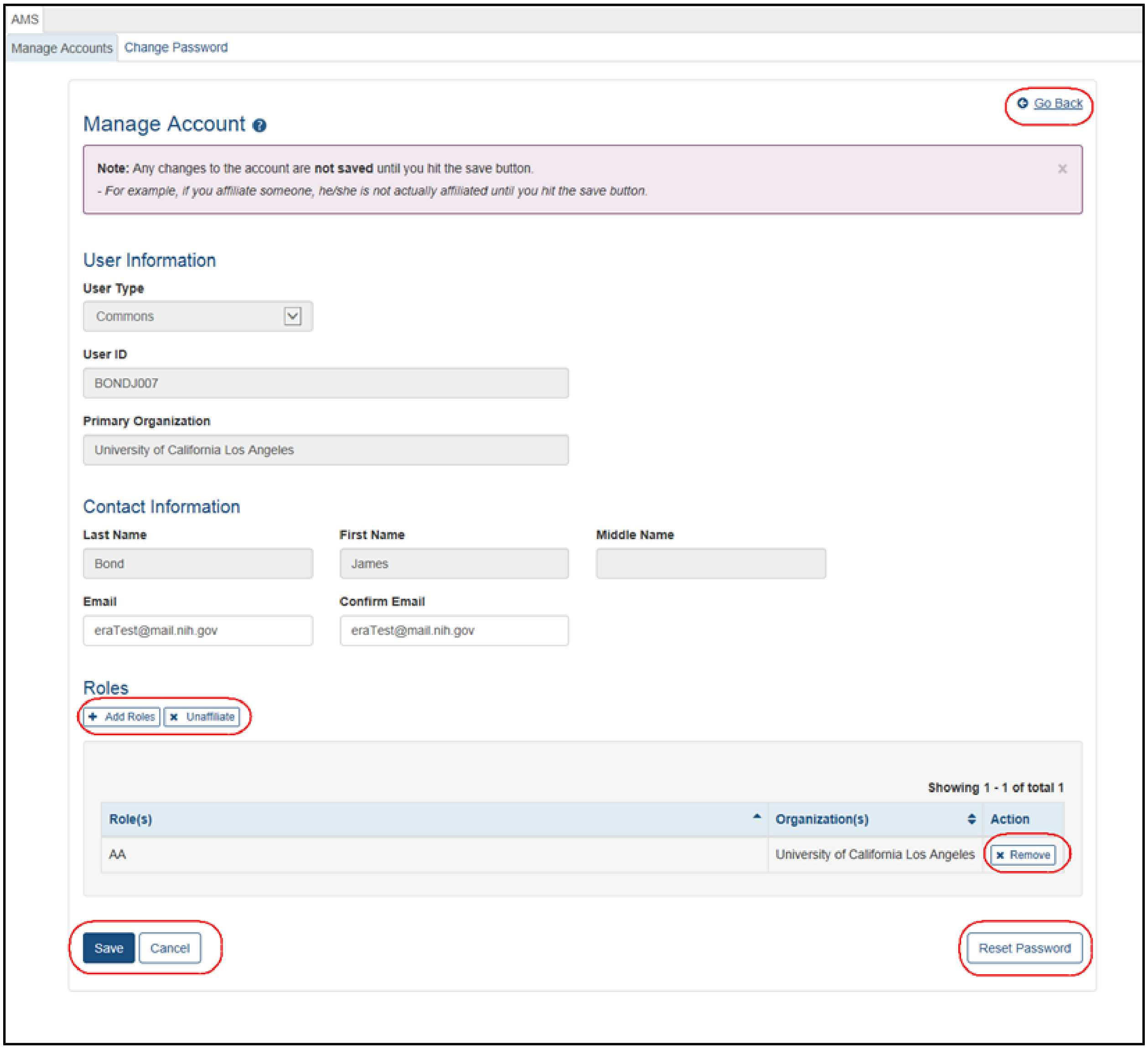


Figure 79: Manage Account Screen Displaying an Affiliated Account

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.

NOTE: Only accounts with IAR, PI, TRAINEE, POSTDOC or SPONSOR roles may have multiple affiliations. If an account has any roles in addition to these, the affiliation cannot proceed.

NOTE: 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, please refer to the Add/Delete Roles topic.
3. To affiliate an account with an organization, click the **Affiliate** button, if displayed.
   a. For more information, please refer to the Affiliate Account topic.
4. To unaffiliate an account, click the **Unaffiliate** button, if displayed.
   a. For more information, please refer to the Unaffiliate Account topic.
5. Perform one of the following options:
   a. Click the **Save** button to save the changes.
   b. Click the **Cancel** button to clear the fields.

When the **Save** button is clicked, the system displays the following message on the *Account Details* screen: *Account was updated successfully!*.

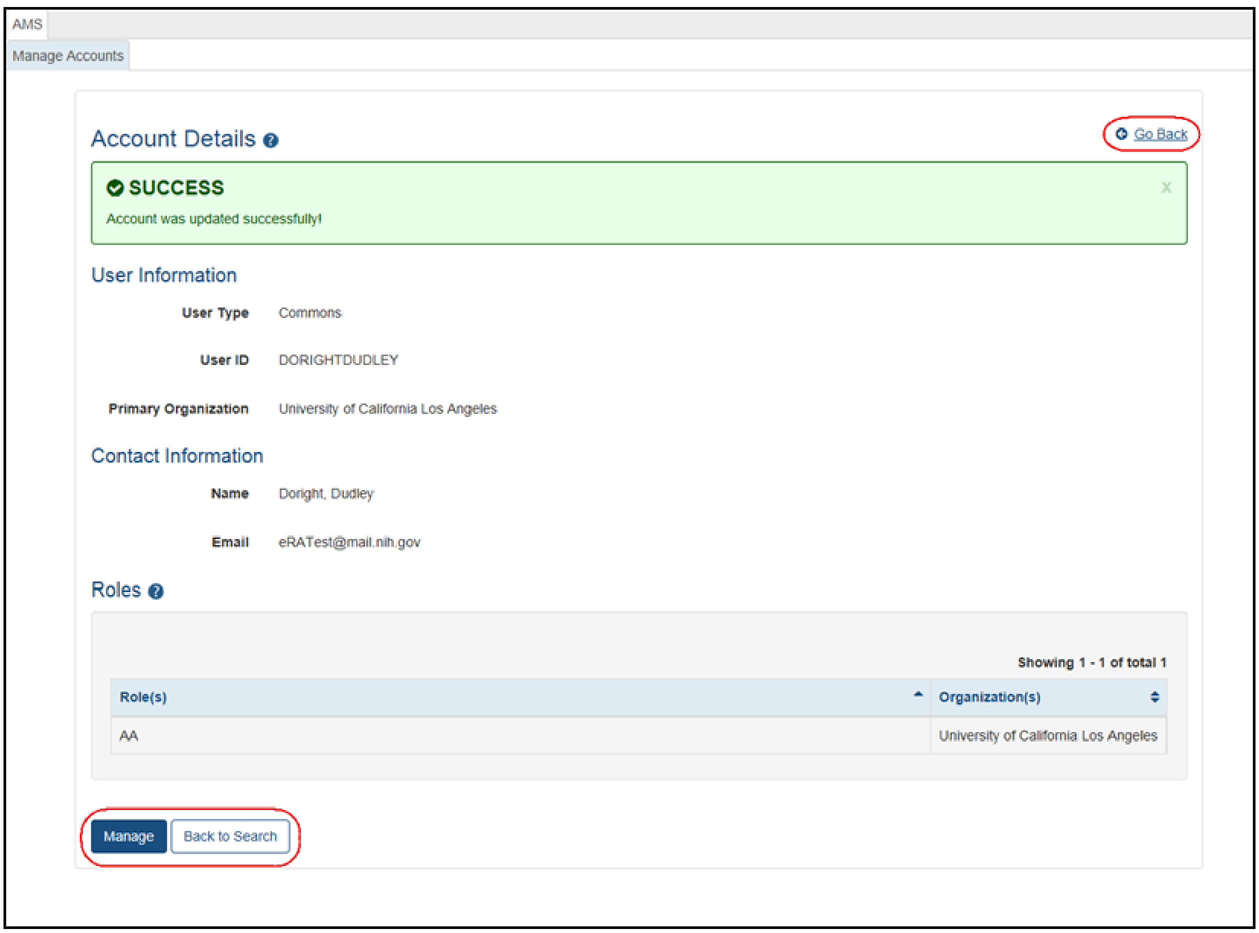


Figure 80: Account Details Screen Displaying Successful Message

6. 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.

6.3.3 Manage State Department User Accounts

1. Perform one of the following steps to edit an 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 is displayed.

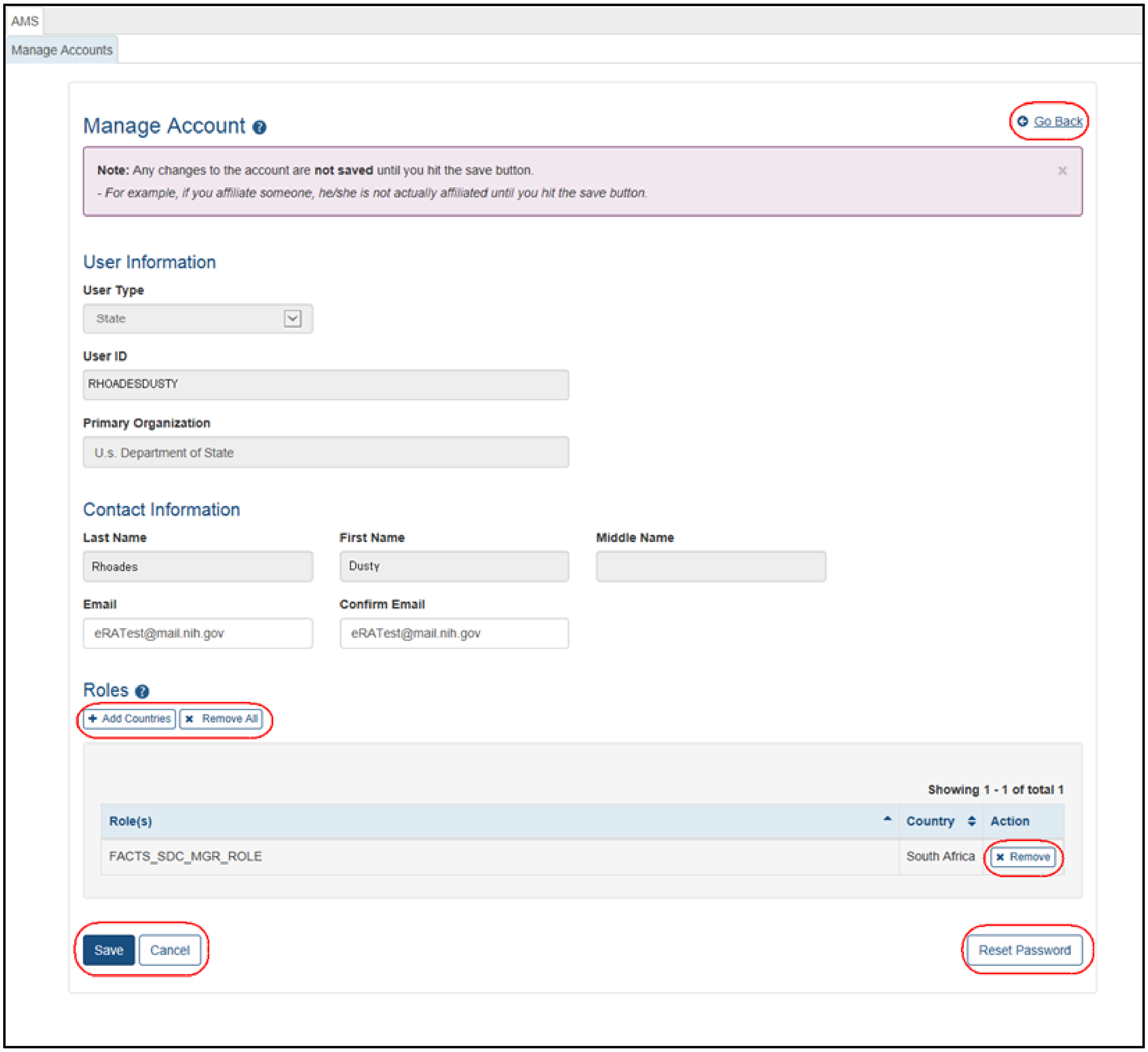


Figure 81: Manage Account Screen for State Department Users

NOTE: Fields grayed out cannot be edited.

Perform one or more of the following steps :

1. Edit the **Email** addresses, if necessary.
2. Click the **+ Add Countries** button to add countries.
    a. For more information, please refer to the Add/Delete Countries topic.
3. Click the **Remove** button to remove a country from the list in the *Roles* section.
4. Click the **Reset Password** button to reset the user's password.
    a. Please refer the Reset Password topic for more information.

5. Perform one of the following options:
    a. Click the **Save** button to save the changes.
    b. Click the **Cancel** button to return to the *Account Details* screen.

When the **Save** button is clicked, the *Account Details* screen displays with the following message: *Account was updated successfully!*

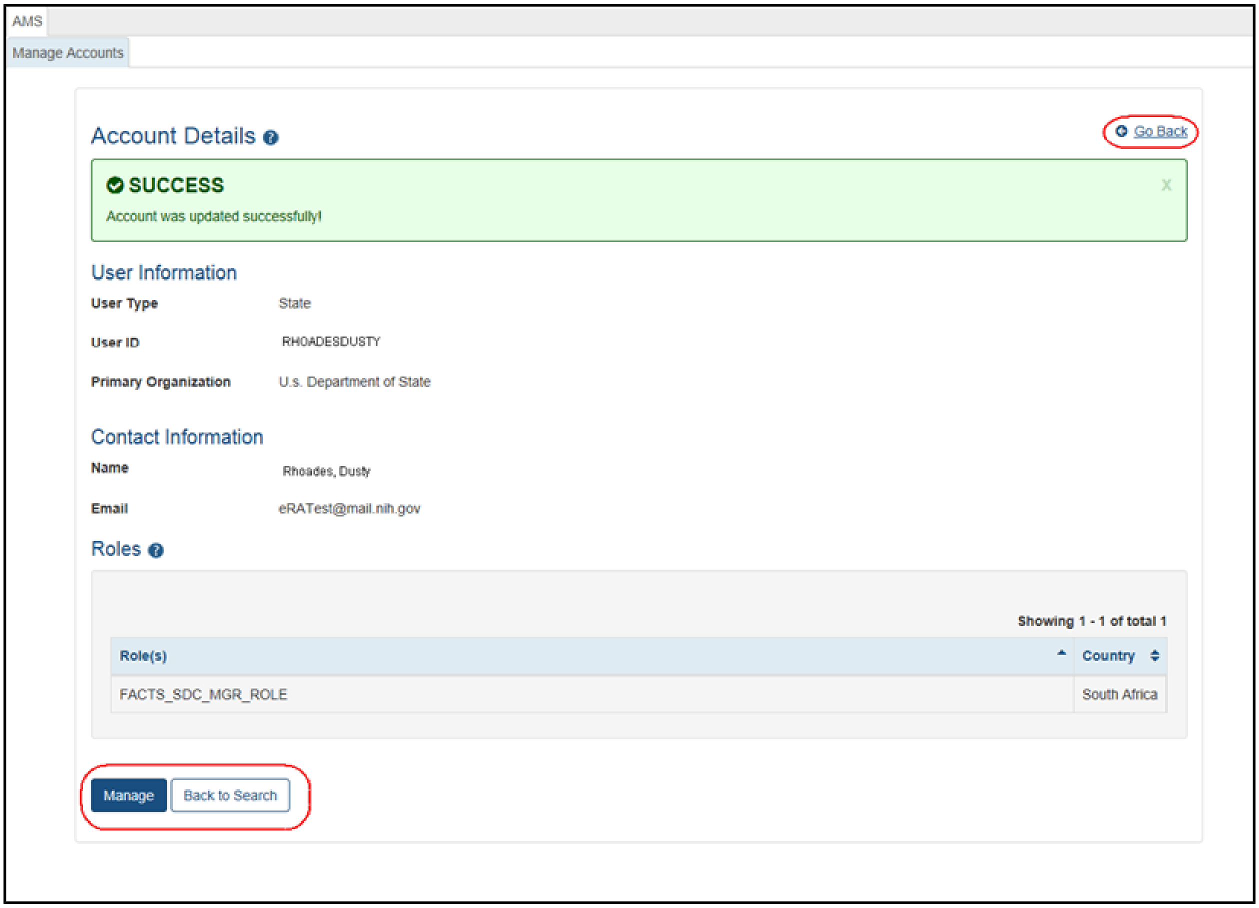


Figure 82: Account Details Screen for State Department Users

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.
    c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

6.4 Manage System Accounts

Modifying system accounts can be performed by Commons, Agency, and external iEdison users.

NOTE: iEdison Agency/ ERL and State Department users cannot create or manage system accounts.

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

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

Perform the following steps:

1. To manage a system account perform a search.
    a. See the Search for System Accounts topic for more information.
2. Click the **Manage** button in the search results for the appropriate system account.

When the **Manage** button is clicked, the *Manage Account* screen displays.

NOTE: Fields grayed out cannot be edited.

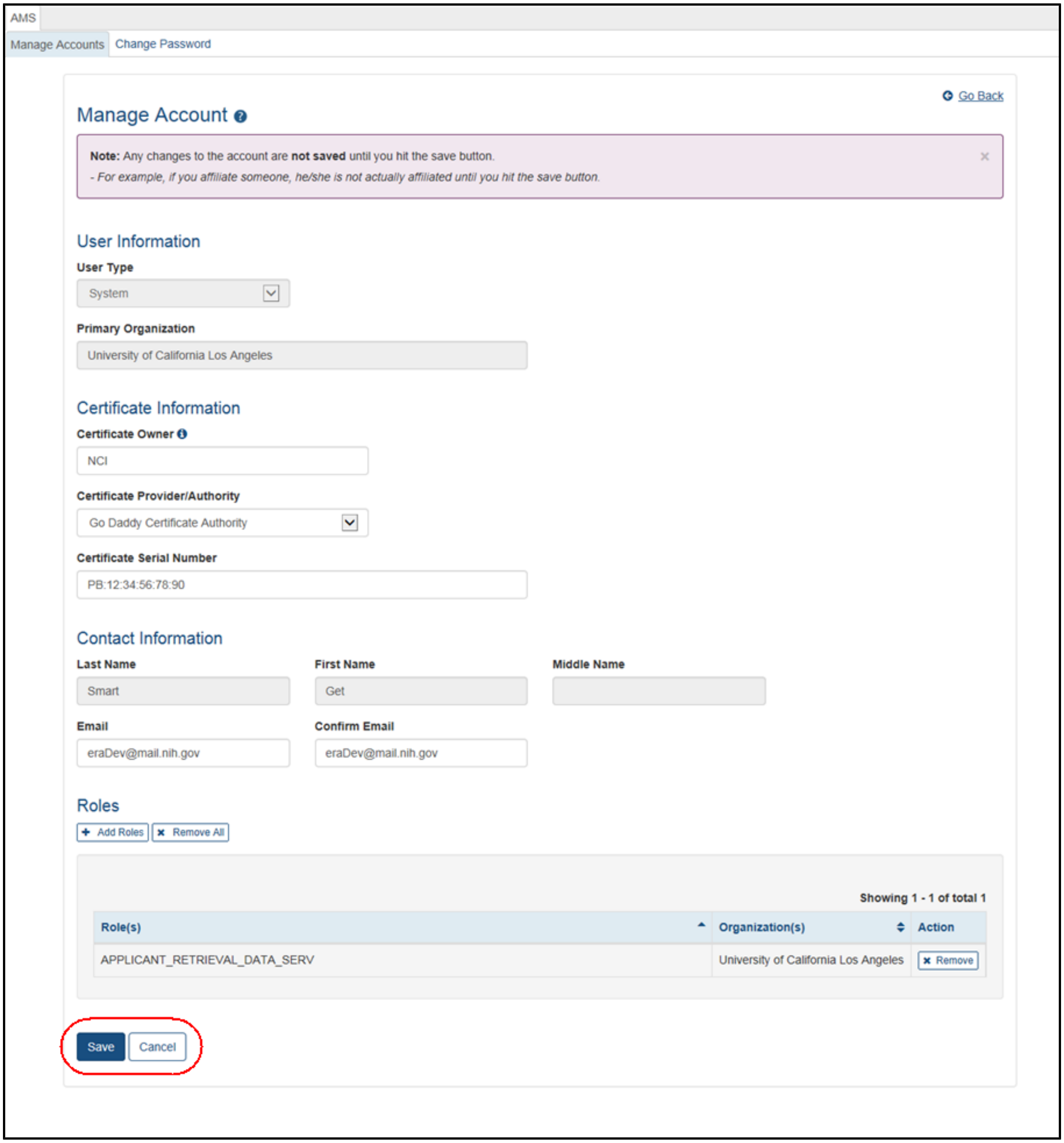


Figure 83: Manage Account Screen for Commons Management Staff

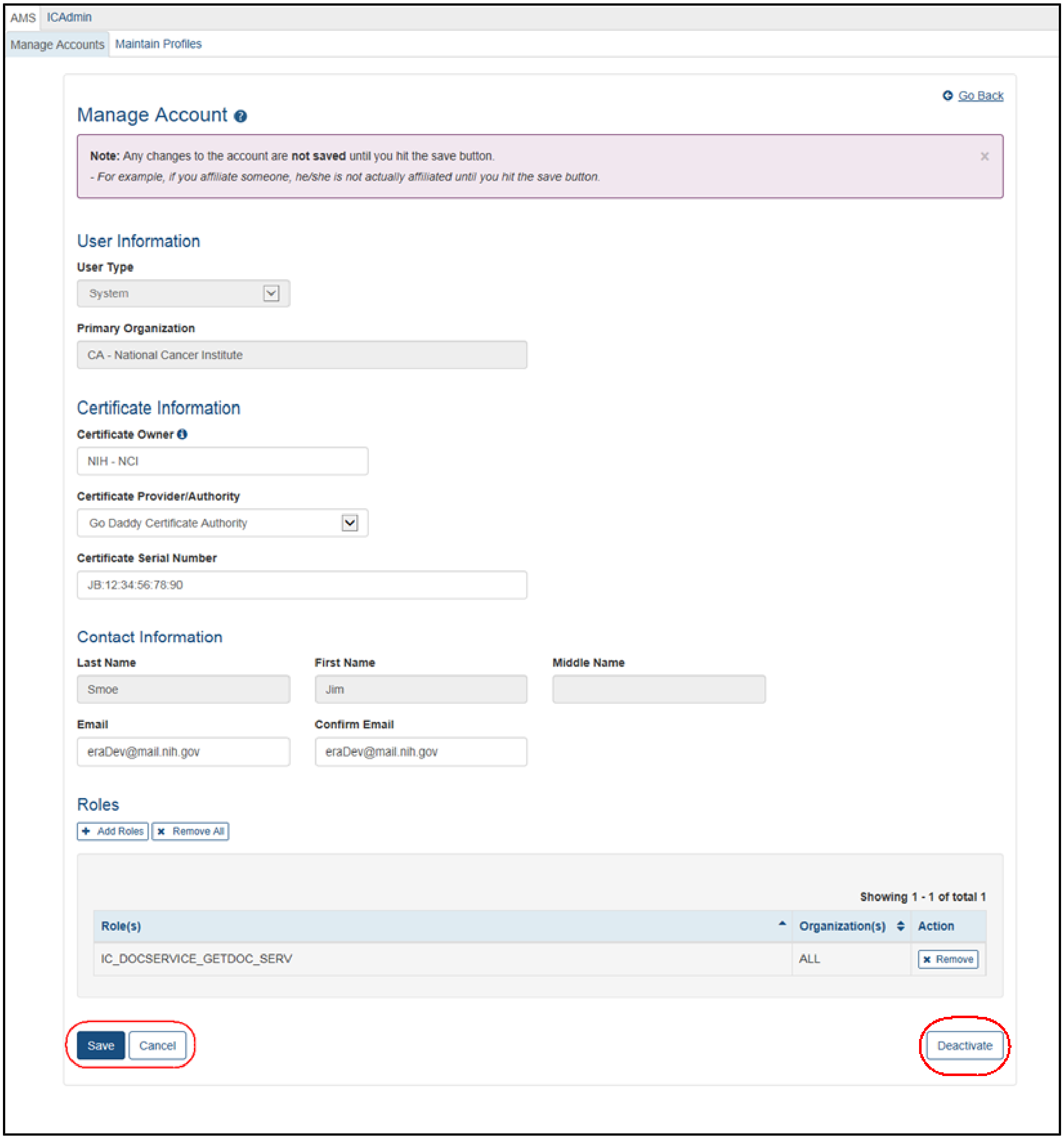


Figure 84: Manage Account Screen for Agency Management Staff

3. Edit any non-gray fields.
4. To add roles, click the + **Add Roles** button.
    a. See the Add Roles topic for more information.
    b. See the System Roles topic for information on the different system roles.
5. To remove a role, click the appropriate **X Remove** button.
6. To remove all roles, click the **X Remove All** button.

7. For **internal (Agency) users ONLY** click the **Deactivate** button to deactivate an account.
    a. See the Deactivate Account topic for more information.
8. Perform one of the following options:
    a. Click the **Save** button to save the changes.
    b. Click the **Cancel** button to cancel the changes.

When the **Cancel** button is clicked, the *Account Details* screen is displayed.

When the **Save** button is clicked, the *Account Details* screen displays with the following message: *Account created successfully*.

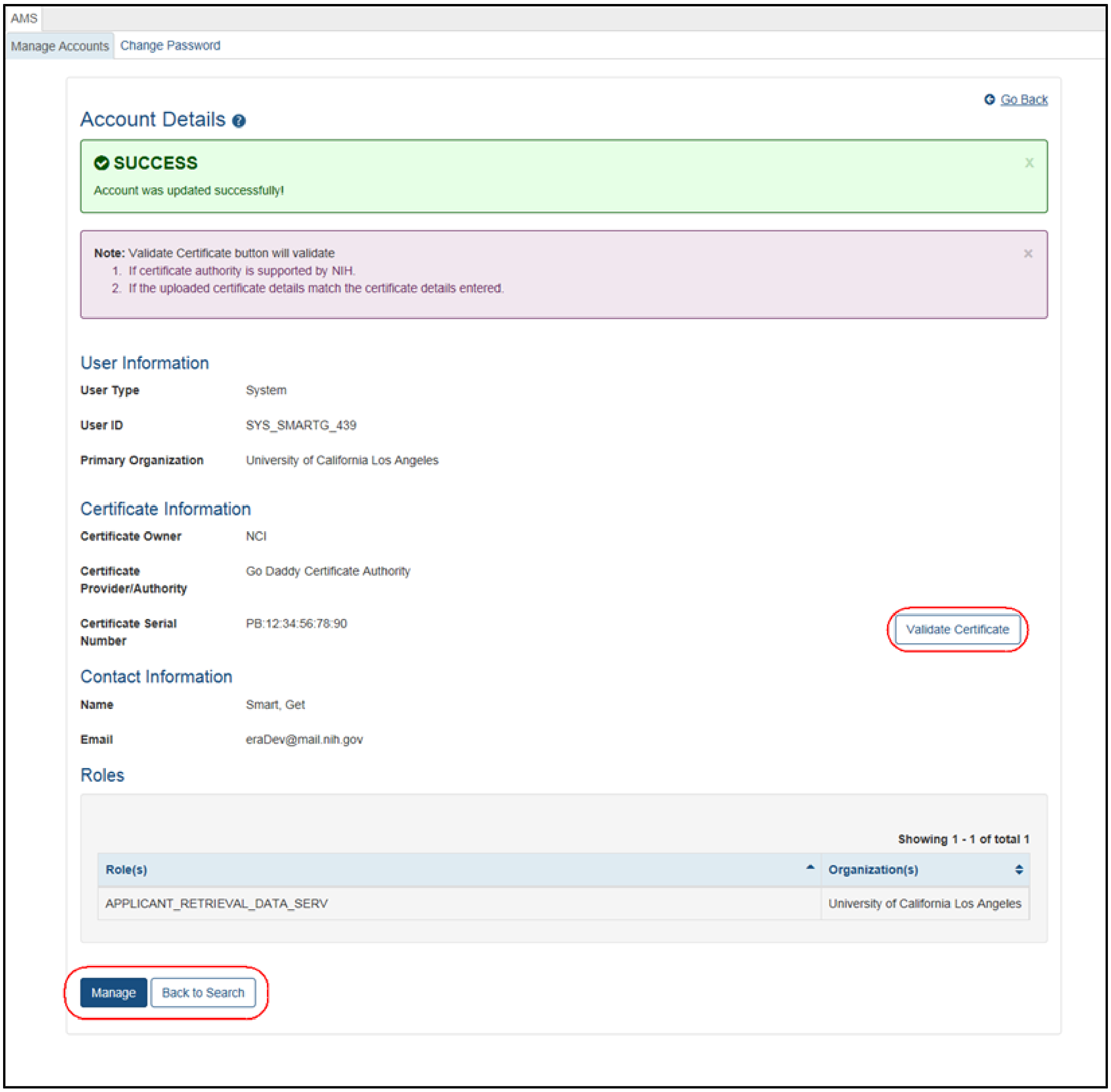


Figure 85: Account Details Screen for Commons Management Staff

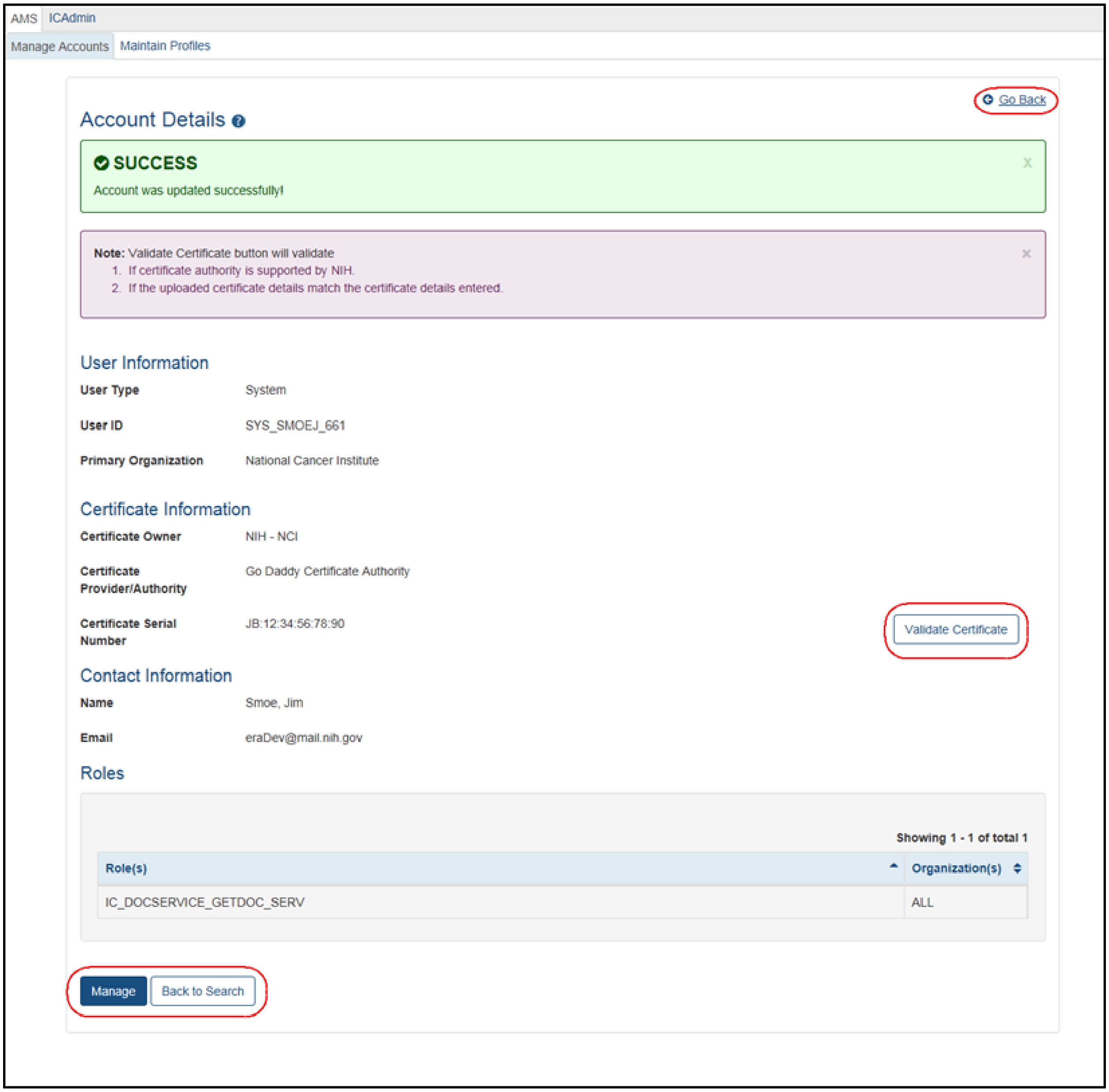


Figure 86: Account Details Screen for Agency Management Staff

9. Perform one of the following options on the *Account Details* screen:
    a. If the certificate needs to be validated, click the **Validate Certificate** button.
        i. See the Validate Certificate topic for more information.
    b. To return to the *Manage Accounts* screen, click the **Manage** button or the **Go Back** hyperlink.
    c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

6.5 *Affiliate Account*

Commons Users

1. To affiliate an account with an organization, click the **Affiliate** button in the *Roles* section on the *Manage Account* screen.

When the **Affiliate** button is clicked, the *Add Roles* screen displays.

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

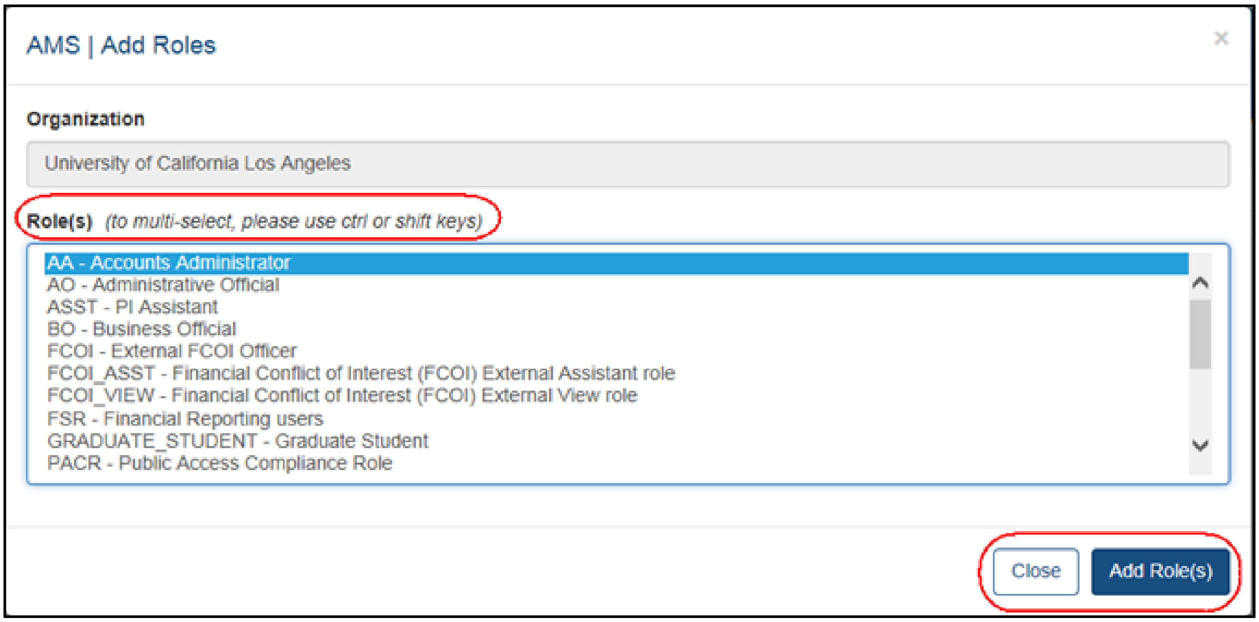


Figure 87: Add Roles Screen

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 and the **Unaffiliate** button is displayed in the *Roles* section on the *Manage Account* screen.

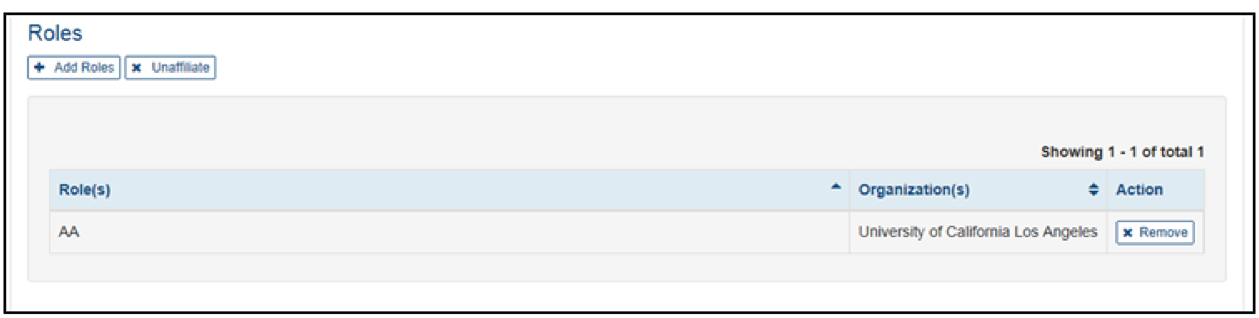


Figure 88: Roles Section on the Manage Account Screen

Agency Users

When a role is added for an agency or IC user at account creation time, the account is considered affiliated with that agency or IC. For information on adding roles, please refer to the Add Roles topic.

6.6 Unaffiliate Account

6.6.1 Commons Users and Agency Users

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

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

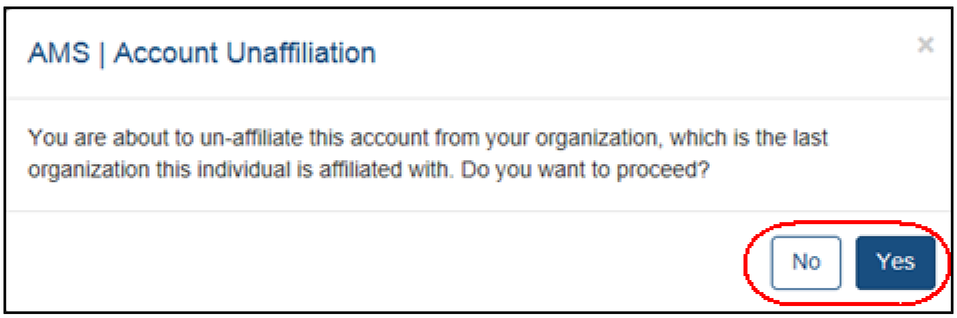


Figure 89: Account Unaffiliation Screen

2. Perform one of the following options:
    a. Click the **No** button to cancel the unaffiliation.
    b. Click the **Yes** button to unaffiliate the account.

When the **Yes** button is clicked, the all roles assigned to the account are removed and the **Affiliate** button appears in the *Role* section on the *Manage Account* screen.

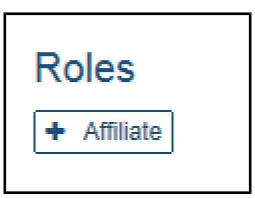


Figure 90: Affiliate Button in Roles Section on Manage Account Screen

6.7 Deactivate Account

NOTE: The Deactivate Account feature is for **Agency Management Staff** only.

When the **Deactivate** button is clicked on the *Manage Account* screen, the *Deactivate Account* screen displays.

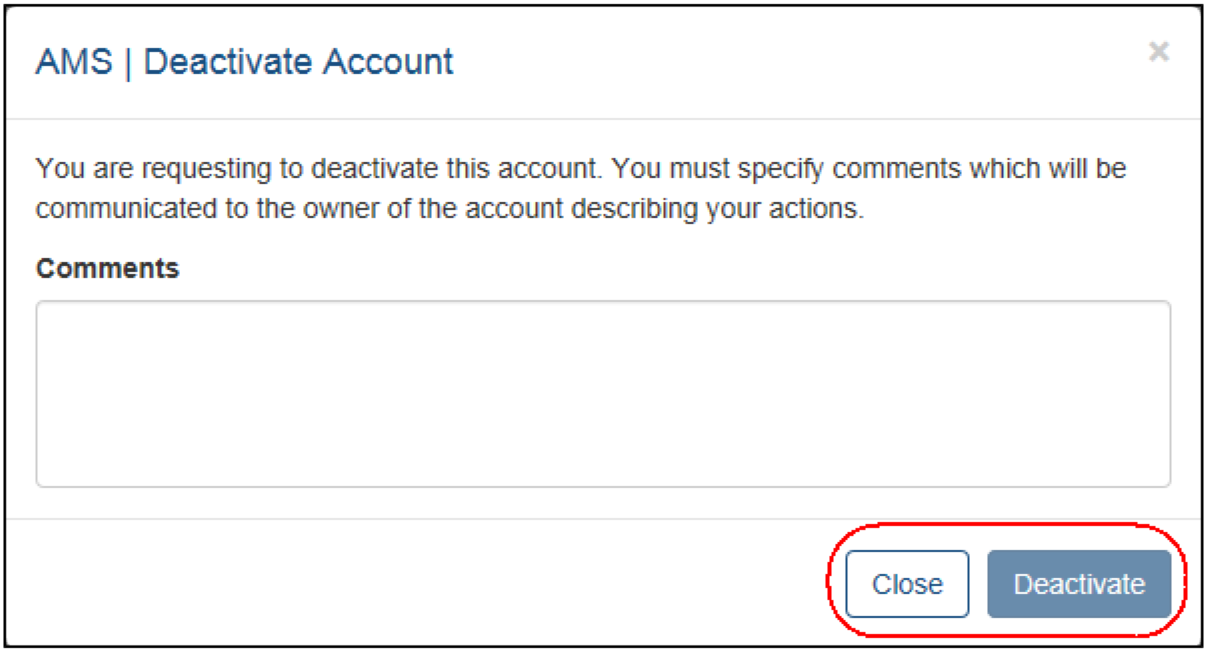


Figure 91: Deactivate Account Screen

1. Enter a required comment.

NOTE: The **Deactivate** button is grayed out until a comment is entered.

2. Perform one of the following options:
   a. Click the **Deactivate** button to deactivate the account.
   b. Click the **Close** button to close the screen.

When the **Deactivate** button is clicked, the system removes the mapping between the NIH/Agency User ID and the eRA User ID and removes all assigned roles. The account information does not display when performing a search.

6.8 Reset Password

NOTE: The Reset Password functionality is for **Commons Management Staff**, **State Department Staff**, and **external iEdison** users only.

1. To reset a user's account password, click the **Reset Password** button located in the lower right side on the *Manage Accounts* screen.

When the **Reset Password** button is clicked, the pop-up *Resent Password* screen displays and an eMail Notification is sent to the appropriate user.

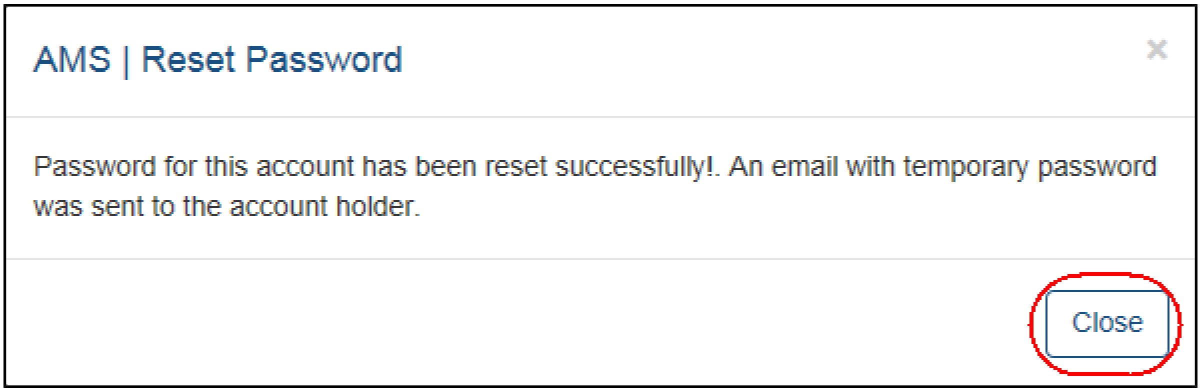


Figure 92: Reset Password Screen

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

7 Change Password

NOTE: The Change Password functionality is for **Commons Management Staff** and **external iEdison** users only.

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.

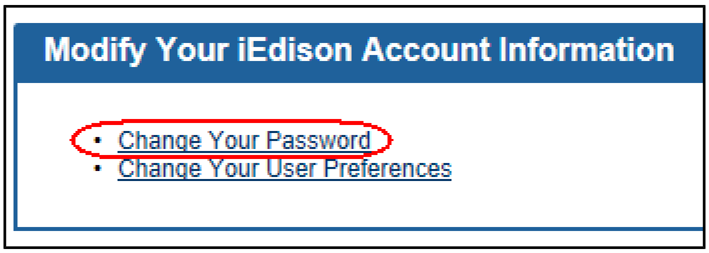


Figure 93: iEdison Main Menu Screen Displaying Change Your Password Hyperlink

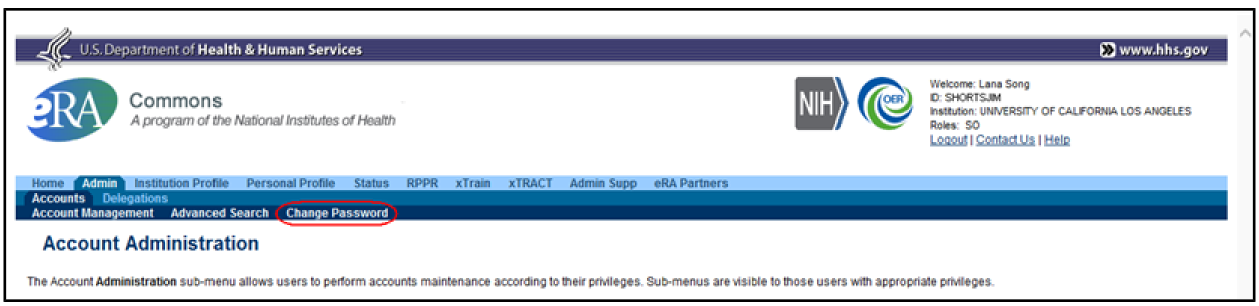


Figure 94: Commons Menu Tabs Displaying the Change Password Tab

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

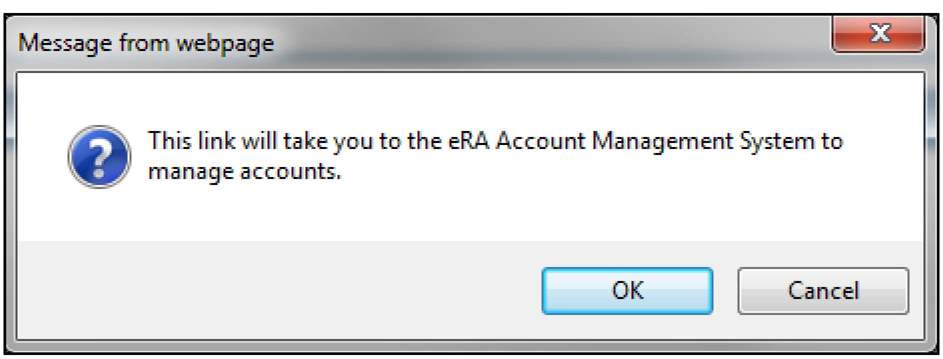


Figure 95: Accessing AMS Pop-up Screen

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.

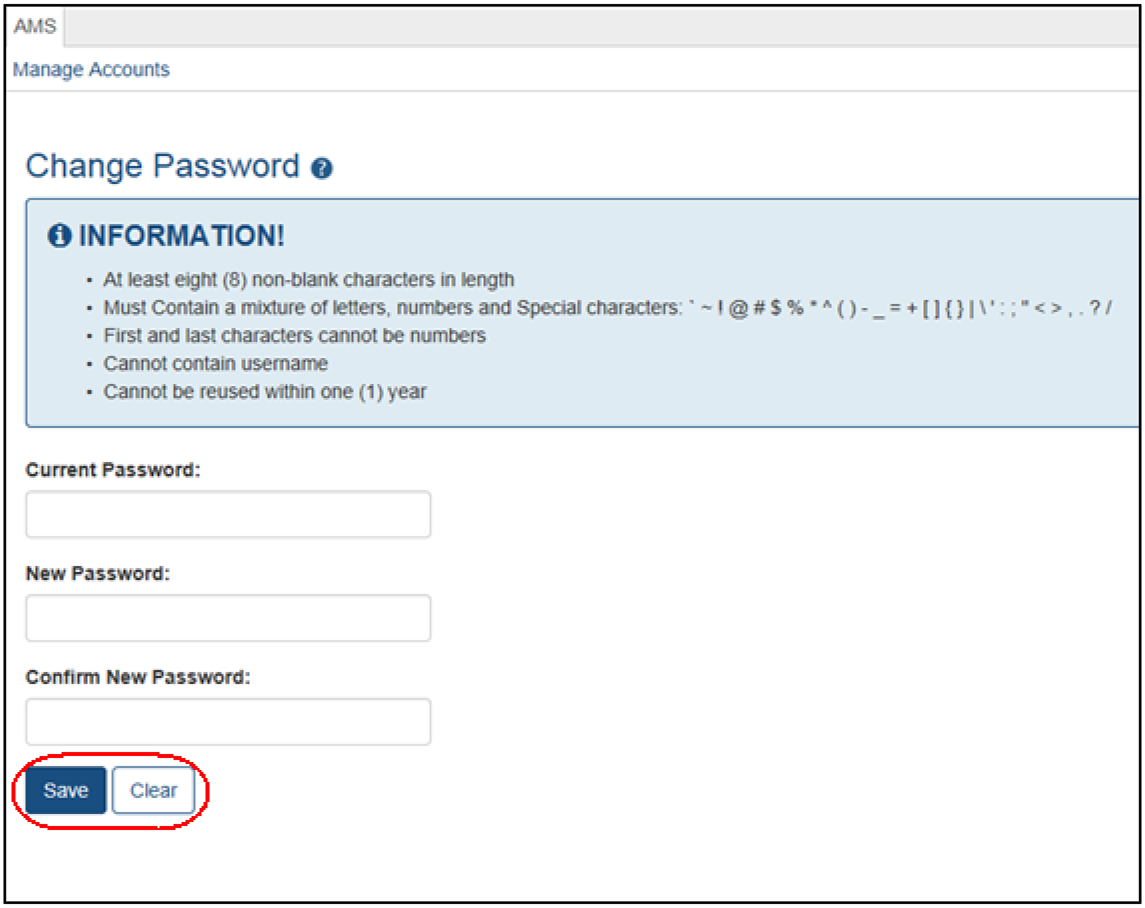


Figure 96: Change Password Screen

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.

8 IRG Clusters

The AMS module provides the ability to manage and create IRG (Integrated Review Group) clusters, committees and SEPs for a given IC.

The User Administration (UADM) module can also be accessed to manage IRG clusters, but that is the only functionality in UADM.

NOTE: This feature is only accessible for the IRG CLUSTER SECURITY ROLE. Any of the three roles, UADM QUERY ROLE, UADM USER ROLE, UADM ADMIN ROLE must exist in addition to IRG CLUSTER SECURITY ROLE on the user account to maintain IRG clusters.

Please refer to one of the topic below for more information:

- Manage IRG Clusters
- Create IRG Clusters
- Create New Super Clusters

8.1 Manage IRG Clusters

1. Click the **Manage IRG Clusters** tab to access the *Manage IRG Clusters* screen.

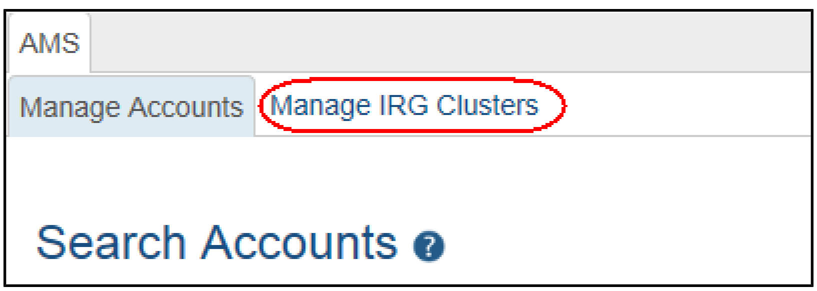


Figure 97: AMS Tabs Displaying the Manage IRG Clusters Tab

The *Manage IRG Clusters* screen displays. The user's Institute name is shown on the top of the screen. If there are multiple assigned IC mapped accounts, then all ICs are displayed in the drop down list.

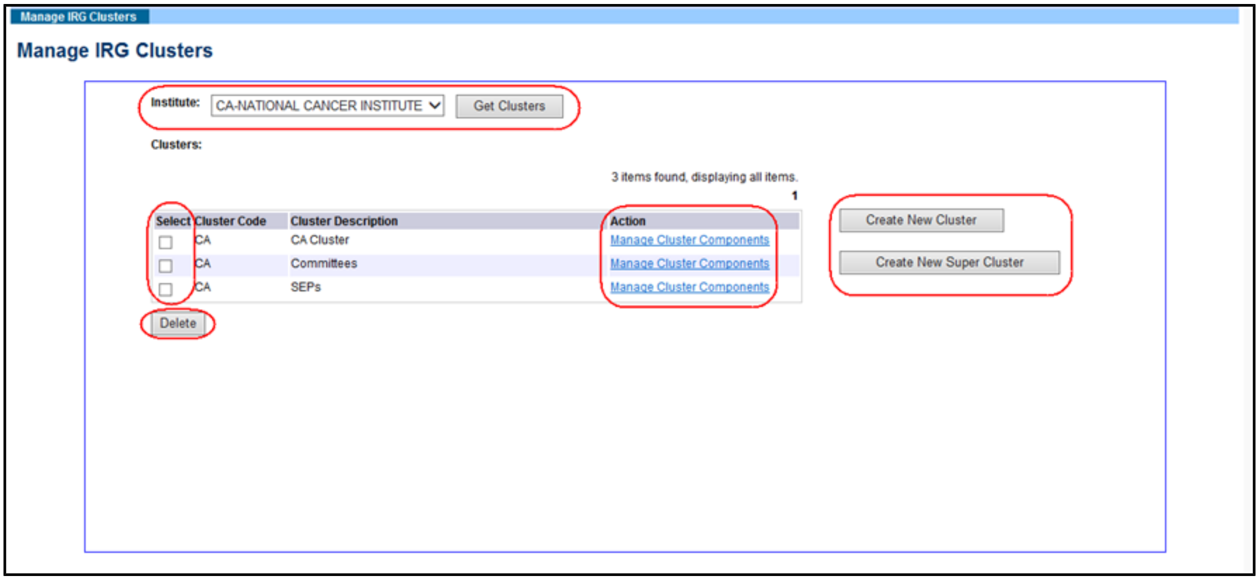


Figure 98: Manage IRG Clusters Screen

2. To obtain all clusters for an IC, select the IC from the pull down menu.
    a. Click on the **Get Clusters** button.

The system displays all the existing clusters for the selected IC in ascending order based on the cluster code. See the above screen print.

3. To delete an IRG Cluster Component, select the appropriate check box and click the **Delete** button.

When the **Delete** button is clicked, the system displays the following prompt message : *Are you sure you want to delete the selected cluster(s)? All cluster components will be deleted as well.*

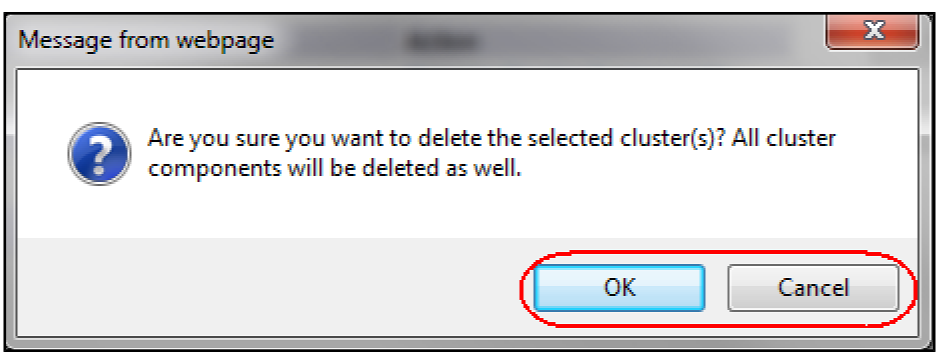


Figure 99: Delete Cluster Pop-up Message Screen

If the system determines that the IRG Cluster being deleted is assigned to one or more accounts, then the following pop-up prompt message appears: *Selected cluster(s) are assigned to existing accounts. All cluster components and their association will be removed for all accounts. Are you sure you want to delete the selected cluster(s)?*

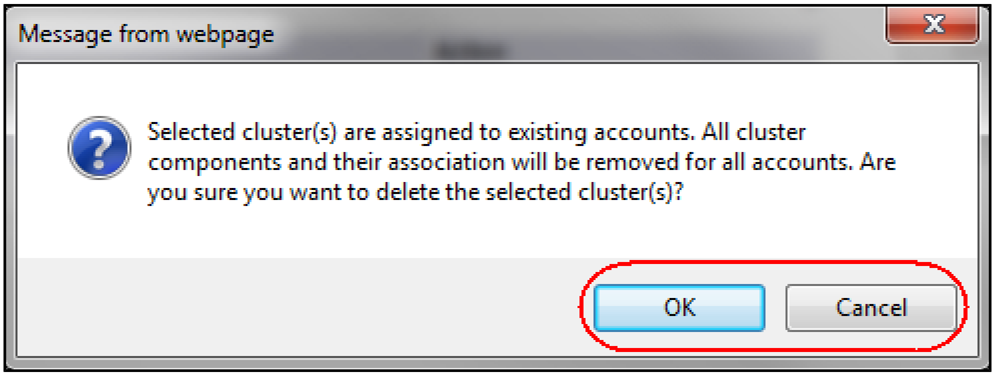


Figure 100: Delete Cluster Pop-up Message Screen for Existing Accounts

4. To maintain an IRG Cluster, click the appropriate **Manage Clusters Components** hyperlink. See the above *Manage IRG Clusters* screen print.

The system displays the *Manage Cluster Components* screen with the appropriate information associated to the cluster and its components. The All Committees and SEPs are sorted in alphabetical order.

For more information on this screen, please refer to the Manage Cluster Components topic.

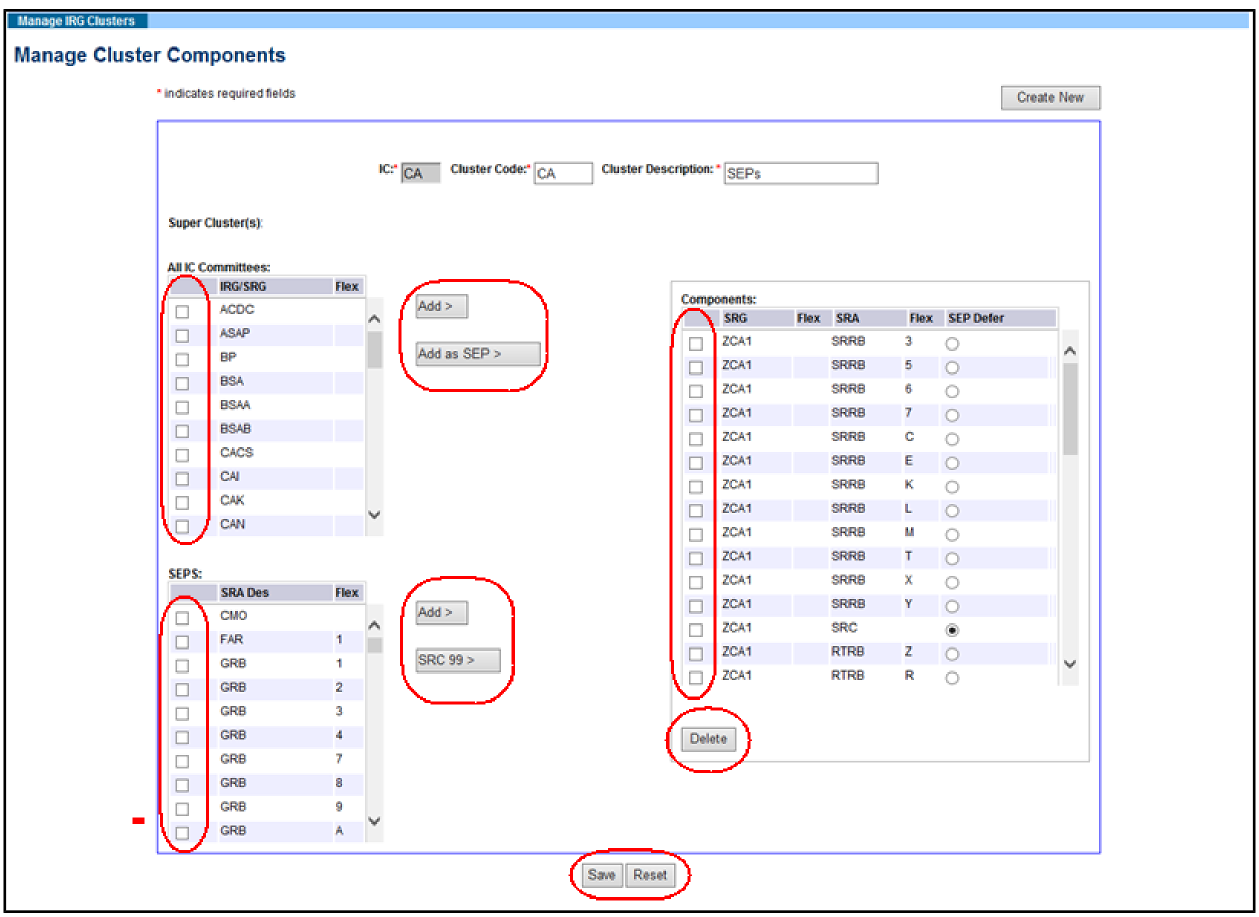


Figure 101: Manage Cluster Components Screen

5. To create a new cluster or super cluster, click the **Create New Cluster** or **Create New Super Cluster** button.
    a. For more information, please refer to the Create IRG Clusters or Create New Super Cluster topic.

8.2 Create IRG Clusters

The Account Management System (AMS) provides the ability to create IRG clusters by assigning committees and SEPs for a given IC. This feature is only accessible for the IRG CLUSTER SECURITY ROLE.

The following business rules apply:

1. The system always provides the latest list of IC CMTES and SEPs.
2. The Cluster Code and the Cluster Description cannot be blank.
3. At least one component must exist for a cluster.
4. The SEP Defer must be selected for one component.
5. Required fields are asterisked. The required fields are: **Cluster Code**, **Cluster Description**, and **Components**.

There are two different ways to access a blank *Manage Cluster Components* screen to create an IRG cluster.

1. For the first way, select the **Create New Cluster** button from the *Manage IRG Clusters* screen.

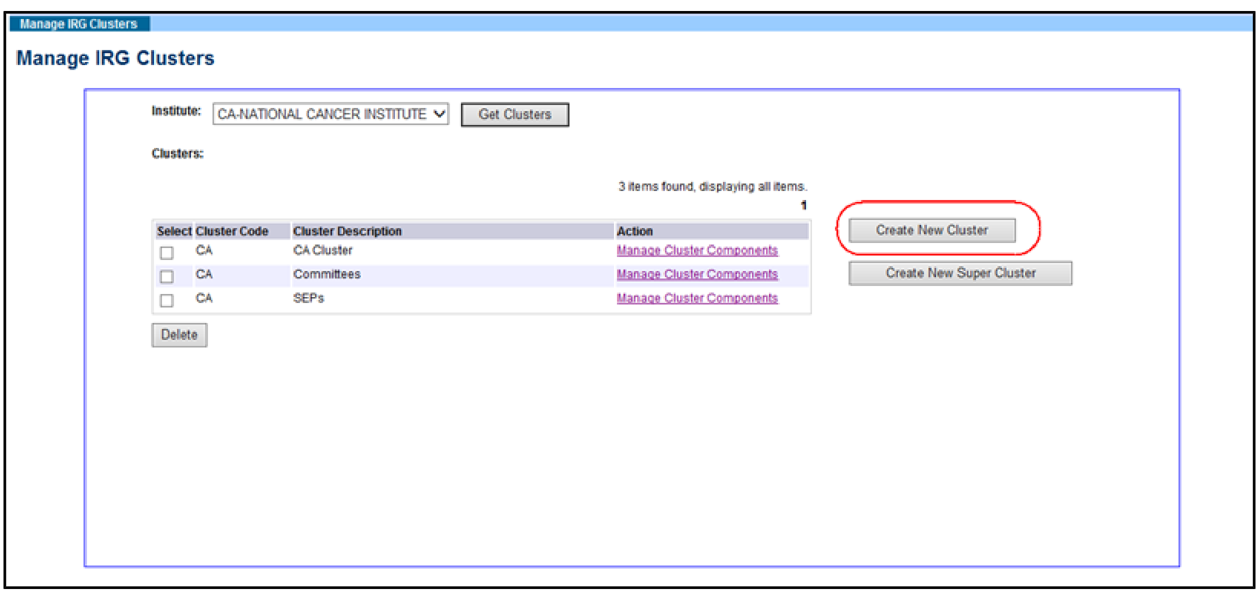


Figure 102: Manage IRG Clusters Screen Displaying the Create New Cluster Button

2. The second way is to click on the appropriate **Manage Components** hyperlink under the **Action** column on the *Manage IRG Clusters* screen.

NOTE: This hyperlink should be used when editing existing cluster components.

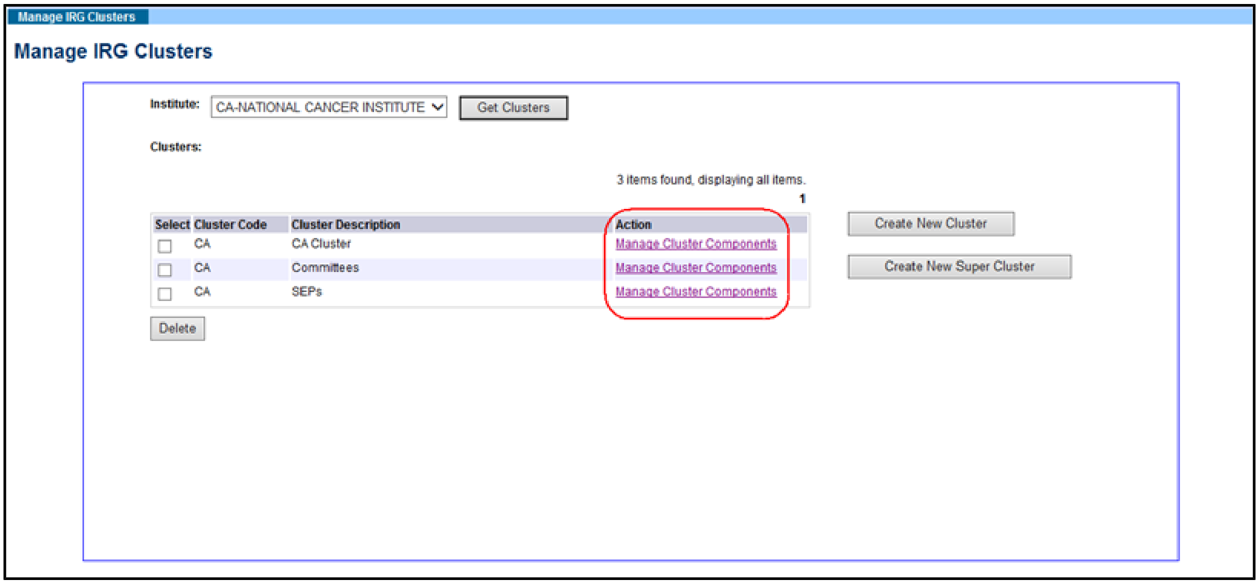


Figure 103: Manage IRG Clusters Screen Displaying Manage Cluster Components Hyperlinks

The system displays the appropriate *Manage Cluster Components* screen completed with the existing cluster and its components information.

3. Click the **Create New** button.

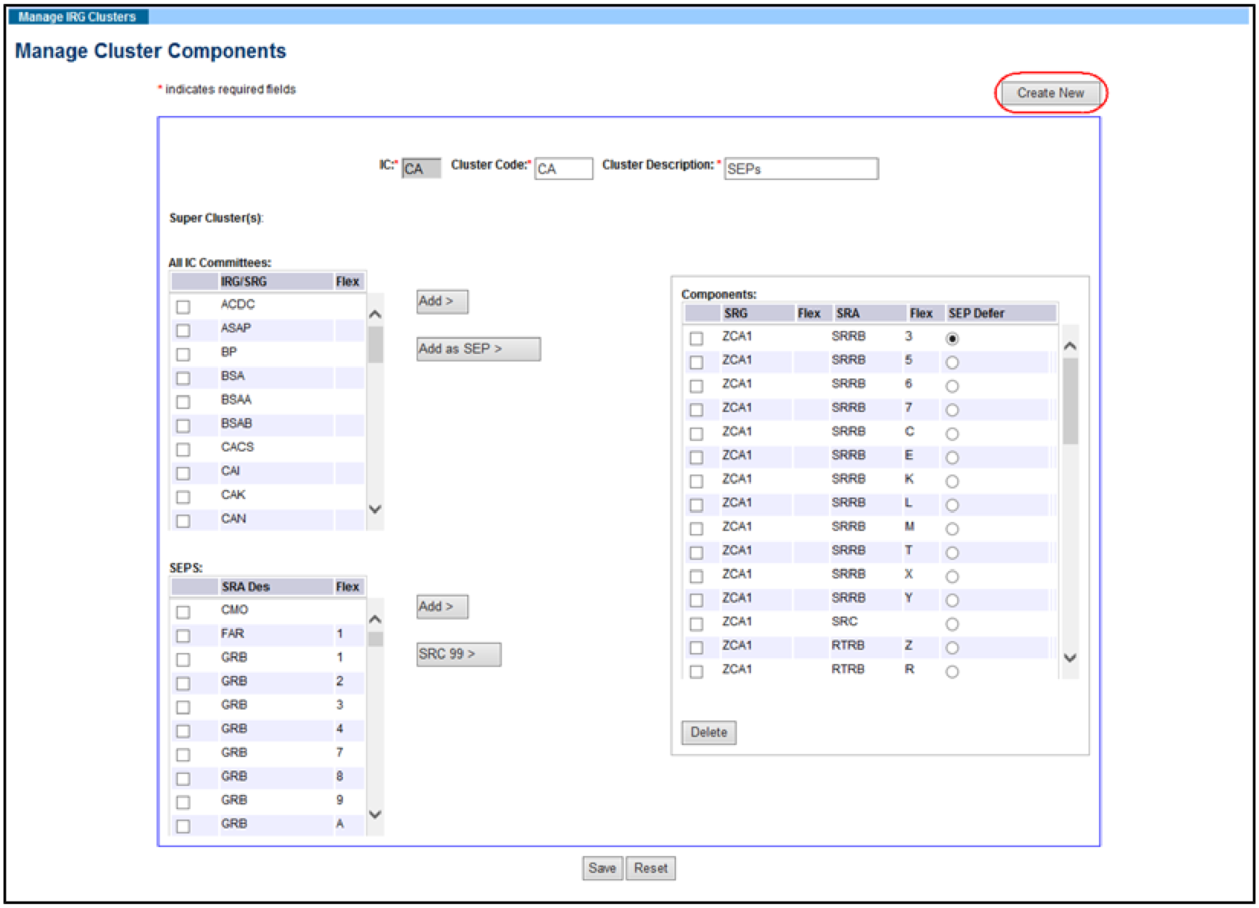


Figure 104: Manage Clusters Component Screen

For either way, the system displays a blank *Manage Cluster Components* screen. The system always provides the latest list of IC Committees (CMTES) and SEPs sorted alphabetically.

For more information on this screen, please refer to the Manage Cluster Components topic.

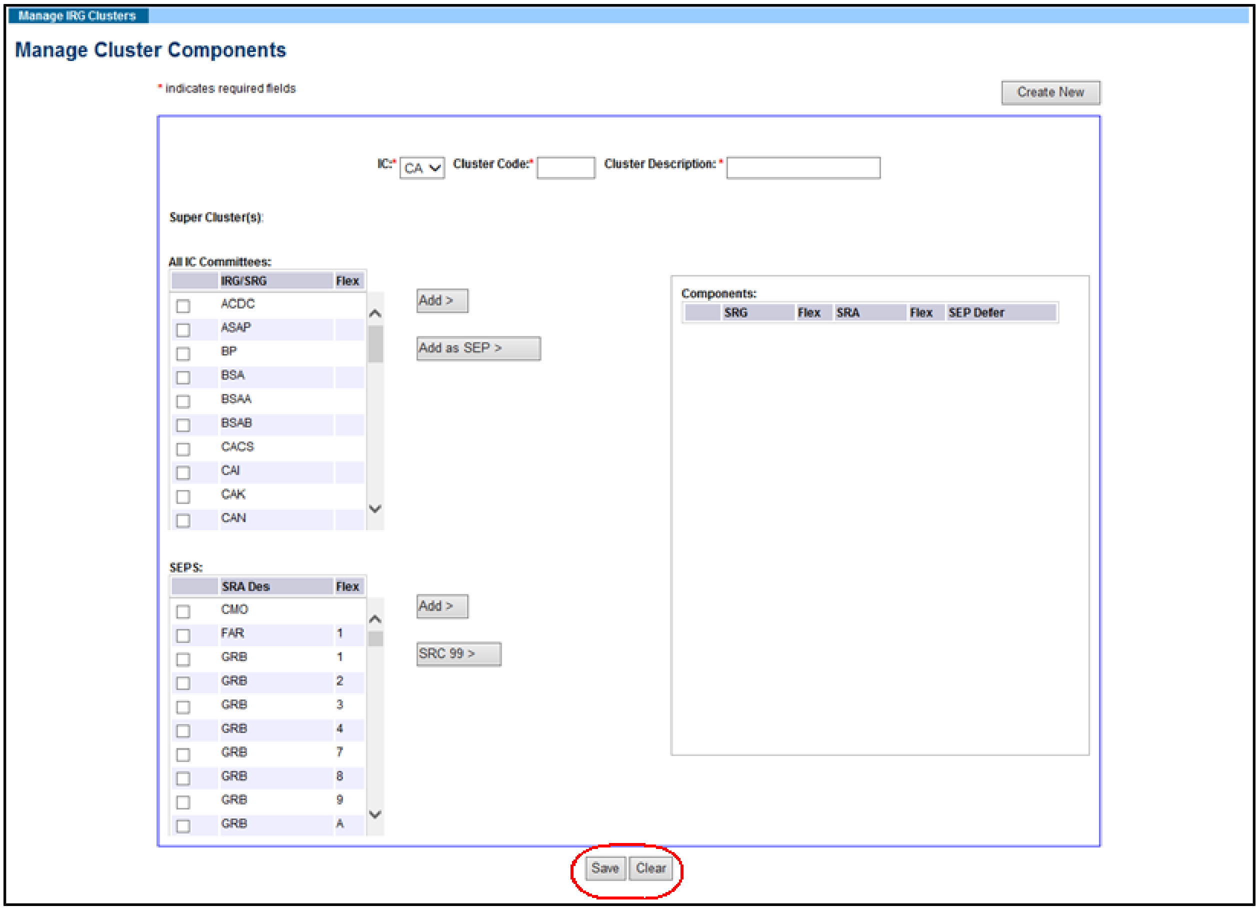


Figure 105: Manage Clusters Component Screen

8.3 Create New Super Cluster

Super Cluster allow Internet Assisted Review (IAR) and Peer Review)REV) users to access most of the meetings as long as the meeting's cluster is within the Super Cluster.

When the **Create New Super Cluster** button is clicked on the *Manage IRG Clusters* screen, the *Manage Super Cluster* screen displays.

NOTE: Required fields are noted by a red asterisk.

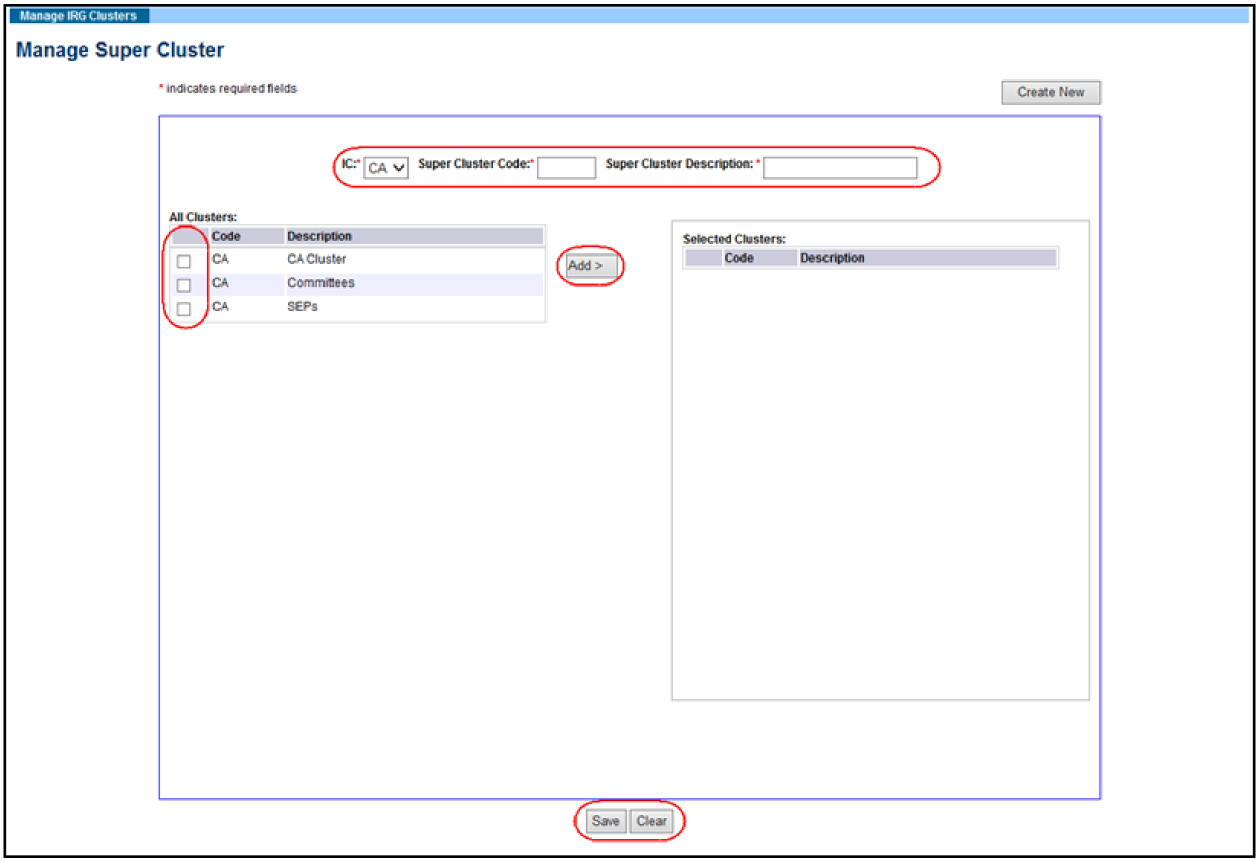


Figure 106: Manage Super Cluster Screen

1. Complete the appropriate information.
2. Perform one of the following options:
    a. Click the **Save** button to save the changes.
    b. Click the **Clear** button to clear out the data.

When the **Save** button is clicked, the system displays the following message: *Super Cluster has been successfully created*.

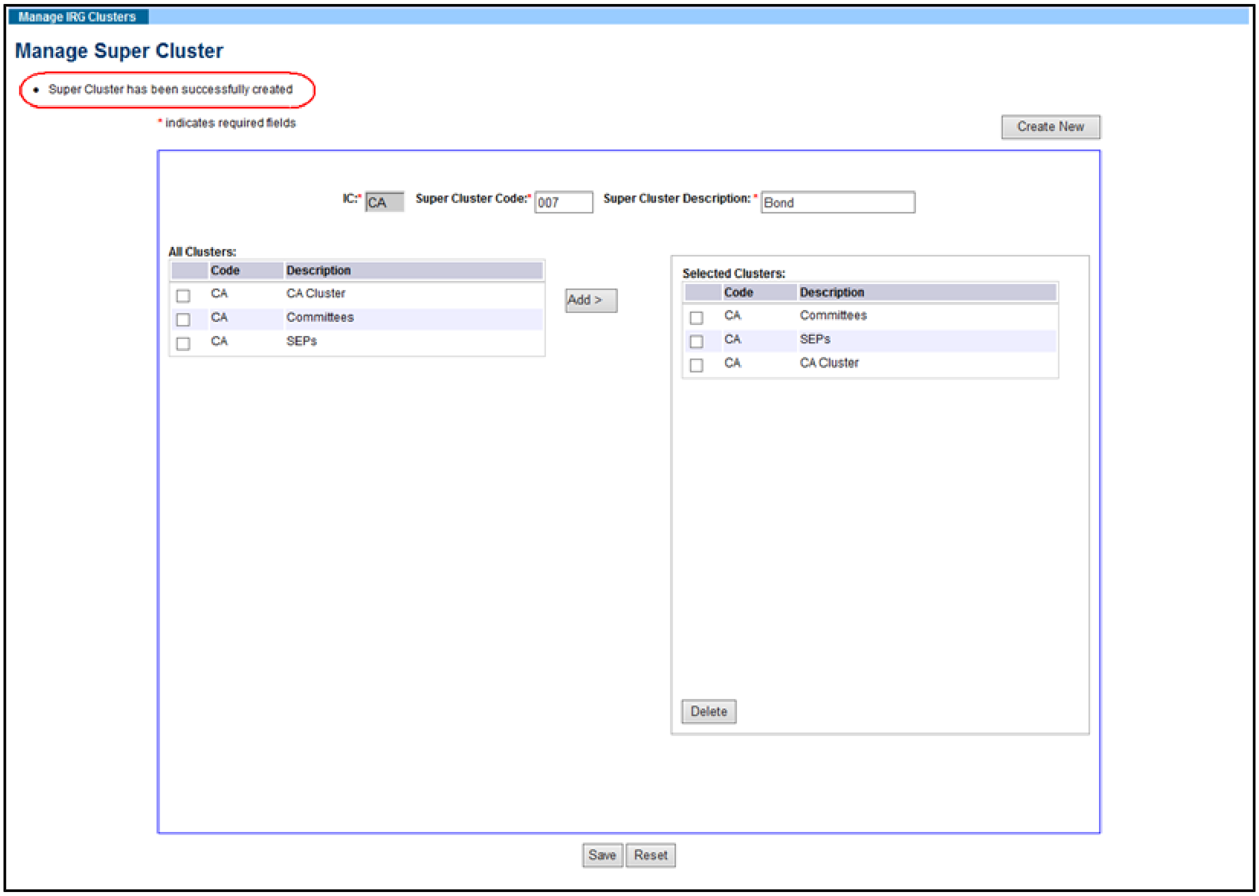


Figure 107: Manage Super Cluster Screen Displaying Successful Message

When the **Clear** button is clicked a warning pop-up message appears. The warning message is: *Are you sure you want to leave this page? You have unsaved changes.*

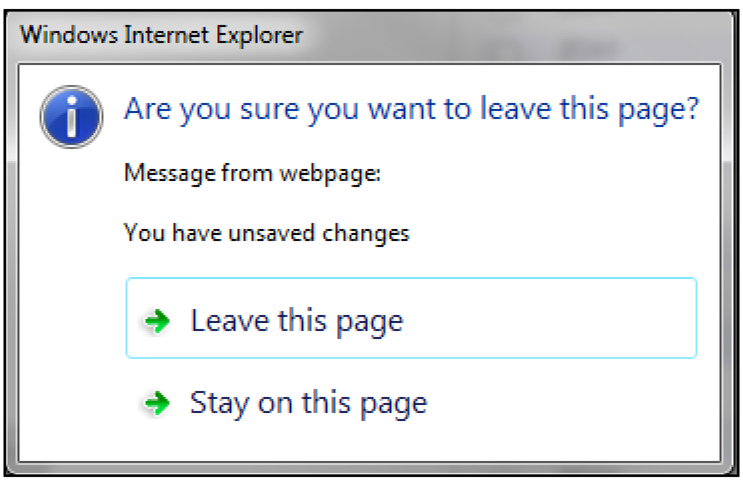


Figure 108: Warning Pop-up Message Screen

3. Perform one of the following options:
    a. Click the **Leave this Page** button to cancel the changes.
    b. Click the **Stay on this Page** button to continue editing.
4. To create another Super Cluster, click the **Create New** button and repeat the steps above.

8.4 Manage Cluster Components

1. To add an IC Committee to the Components, select the appropriate check box and click the **Add** button .

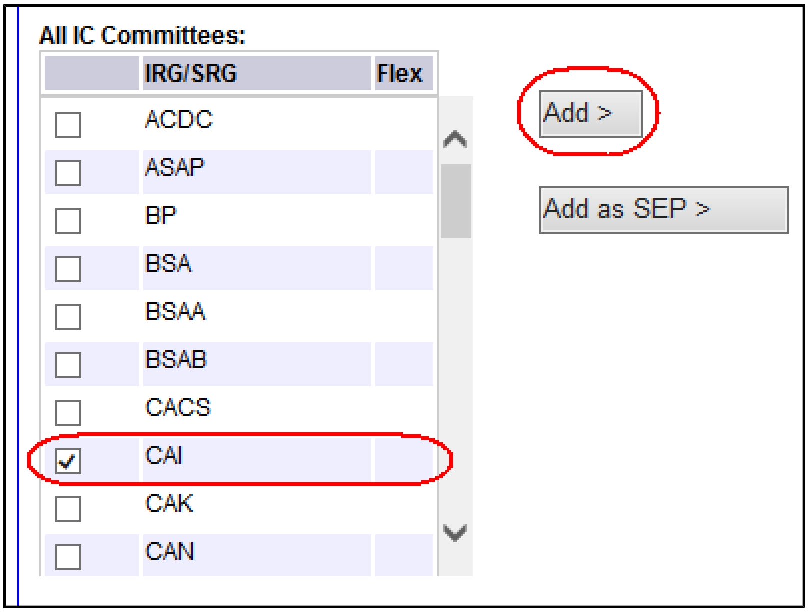


Figure 109: All IC Committees Section on Manage Cluster Components Screen

2. To add an IC Committee as a SEP, select the appropriate check box and click the **Add as SEP** button .

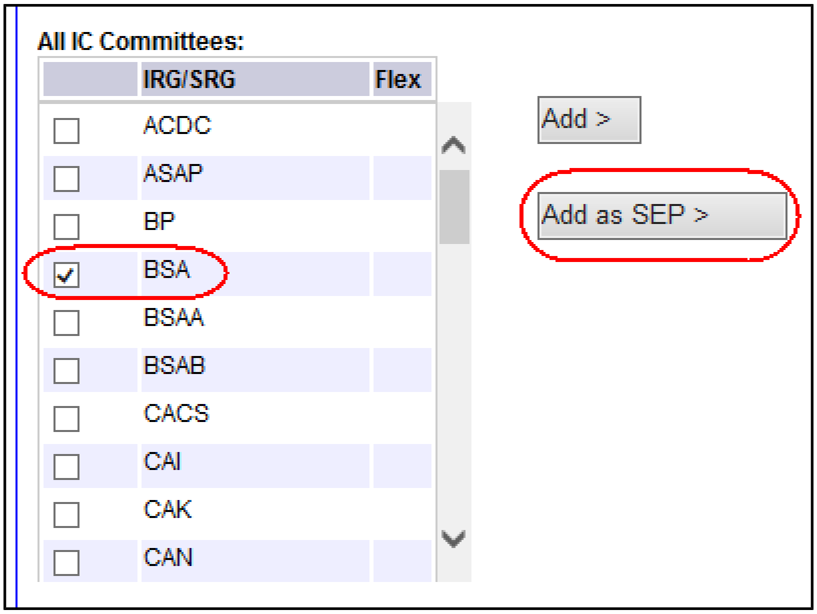
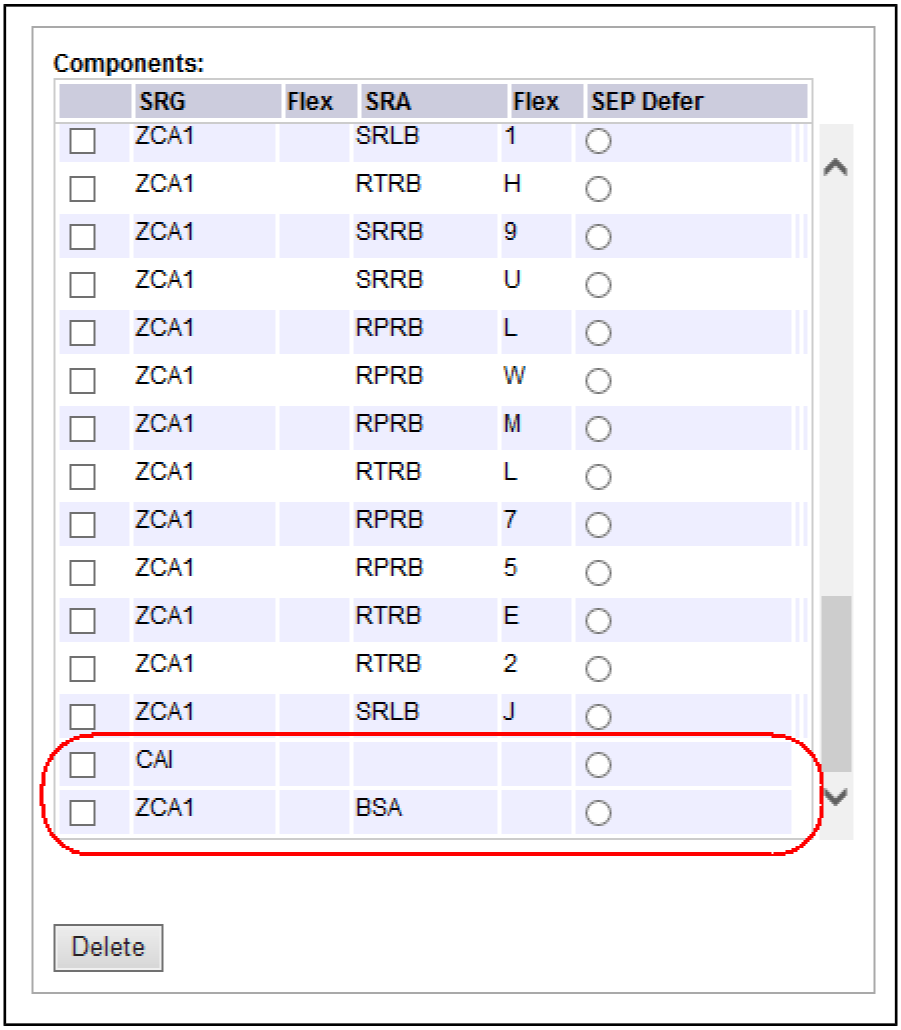


Figure 110: All IC Committees Section on Manage Cluster Components Screen

The system adds the IC Committee and/or the SEP IC Committee to the **Components** list.



Components:

	SRG	Flex	SRA	Flex	SEP Defer
	ZCA1		SRLB	1	
	ZCA1		RTRB	H	
	ZCA1		SRRB	9	
	ZCA1		SRRB	U	
	ZCA1		RPRB	L	
	ZCA1		RPRB	W	
	ZCA1		RPRB	M	
	ZCA1		RTRB	L	
	ZCA1		RPRB	7	
	ZCA1		RPRB	5	
	ZCA1		RTRB	E	
	ZCA1		RTRB	2	
	ZCA1		SRLB	J	
	CAI				
	ZCA1		BSA		

Delete

Figure 111: Components Section on Manage Cluster Components Screen

3. To add a SEP, select the appropriate check box and click the **Add** button.

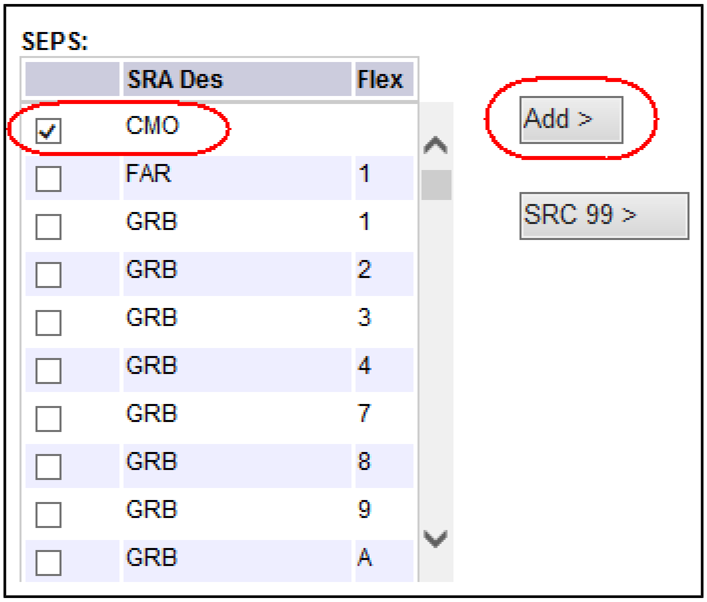


Figure 112: SEPS Section on Manage Cluster Components Screen

4. To add a SRC 99 to the Components, select the appropriate check box and click the **SRC 99** button.

NOTE: Only one SRC 99 component can be created for a component.

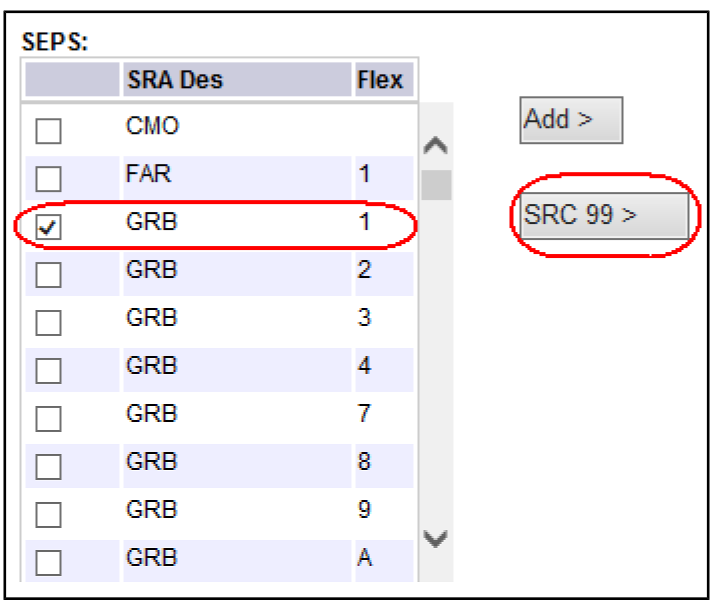
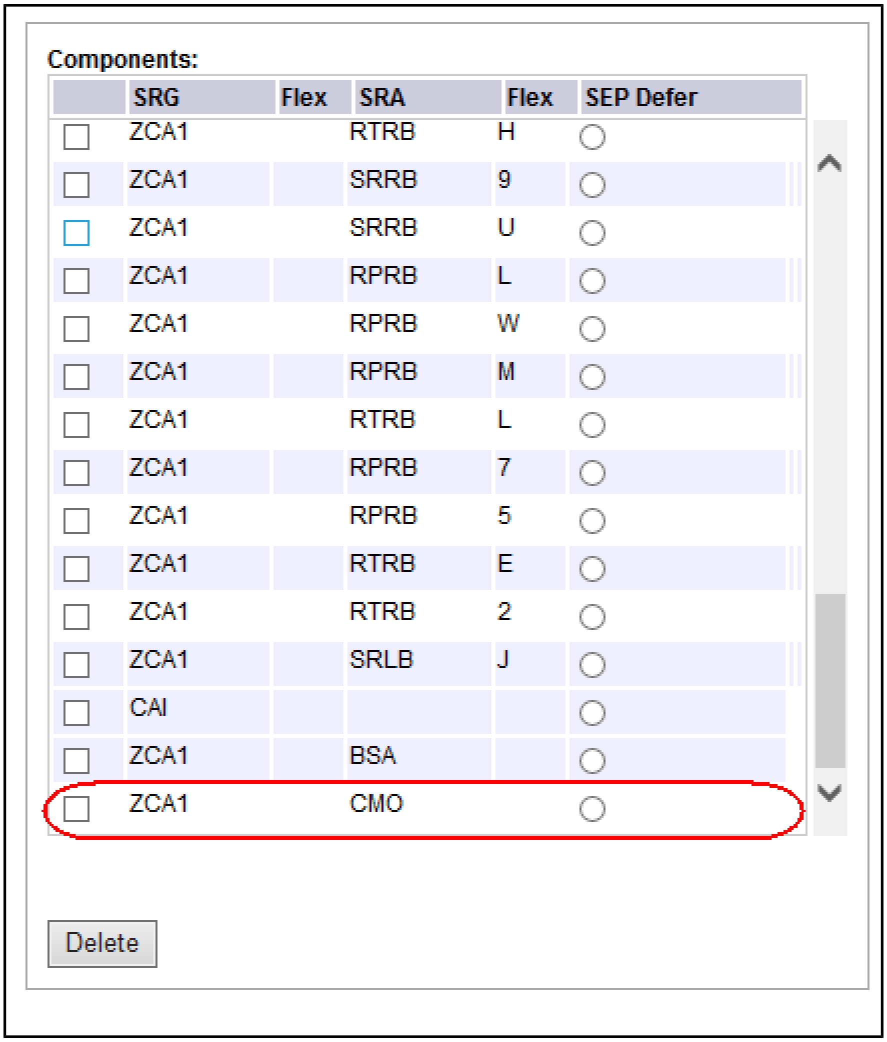


Figure 113: SEPS Section on Manage Cluster Components Screen

5. To indicate a component at SEP Defer, select the appropriate component's radio button. See the *Components* screen print.

The system adds the SEP and/or the SRC 99 to the **Components** list.



Components:

	SRG	Flex	SRA	Flex	SEP Defer
☐	ZCA1		RTRB	H	○
☐	ZCA1		SRRB	9	○
☐	ZCA1		SRRB	U	○
☐	ZCA1		RPRB	L	○
☐	ZCA1		RPRB	W	○
☐	ZCA1		RPRB	M	○
☐	ZCA1		RTRB	L	○
☐	ZCA1		RPRB	7	○
☐	ZCA1		RPRB	5	○
☐	ZCA1		RTRB	E	○
☐	ZCA1		RTRB	2	○
☐	ZCA1		SRLB	J	○
☐	CAI				○
☐	ZCA1		BSA		○
☐	ZCA1		CMO		○

Delete

Figure 114: Components Section on Manage Cluster Components Screen

6. To delete an IRG Cluster Component, select the appropriate component’s check box and click on the **Delete** button.

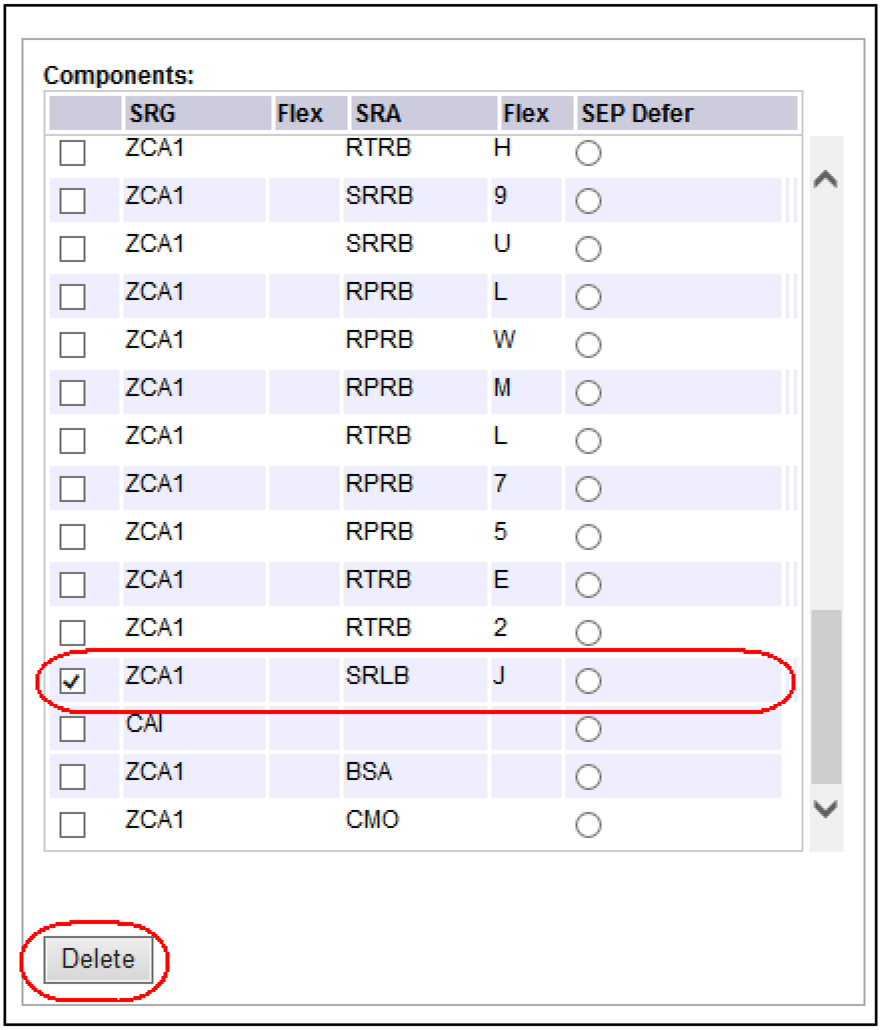


Figure 115: Components Section on Manage Cluster Components Screen

7. To save the changes, click the **Save** button.

The system displays the following message: *Cluster has been successfully updated*.

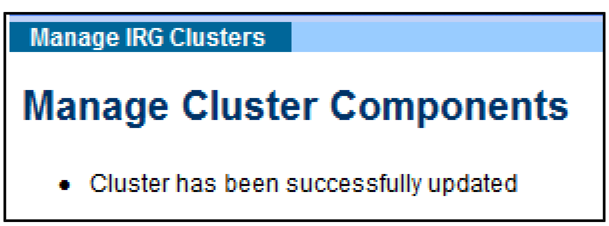


Figure 116: Manage Cluster Components Screen with Successfully Saved Message

8. To reset the changes made before saving, click the **Reset** button.

A warning pop-up message appears. The warning message is: *Are you sure you want to leave this page? You have unsaved changes.*

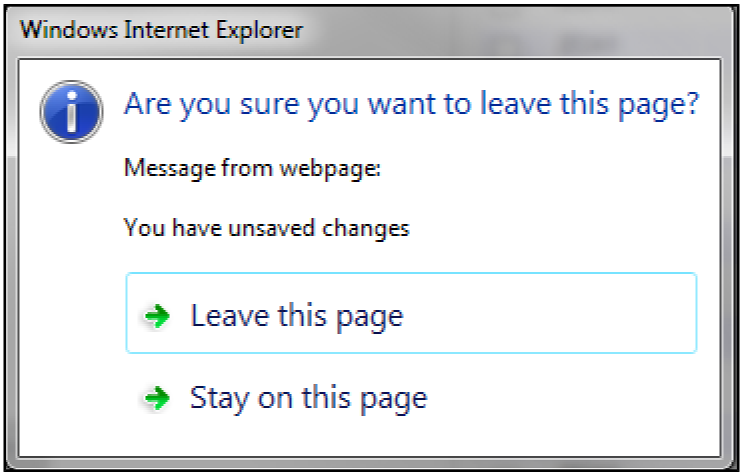


Figure 117: Warning Pop-up Message Screen

9. Perform one of the following options:
    1. Click the **Leave this Page** button to cancel the changes.
    2. Click the **Stay on this Page** button to continue editing.

9 Logging Out of Account Management System (AMS)

To log out of the Account Management System (AMS), click the **Logout** button at the top right corner of the any main Manage Accounts screens.

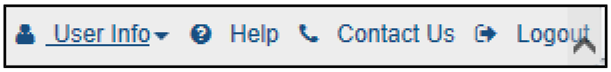


Figure 118: Logout Button

10 Error Messages

10.1 Search Account Error Messages

Condition	Error Message
No records are found	*No results match the provided search criteria. Here are several error resolution suggestions. Try to broaden your search by adding more search parameters. Create an account.*
Search results exceed 500 records	*Maximum number of 500 results exceeded. Please try to limit your search by adding more search parameters.*
Data is not entered in one additional field besides **User Type**	*You must enter at least one search field, in addition to User Type.*
Only one character is provided in the **Last Name** field	*Last name should be 2 or more characters long.*
Less than 3 characters are entered in the **User ID** field	*User ID, should be 3 or more characters long.*

Table 1: Search Account Error Messages

10.2 Validate Certificate Errors

Condition	Error Message
The browser call did not go through to the certificate provider	The appropriate browser error is displayed.
The browser call does go through to the certificate provider, but the mapping does not exist.	*Validation is successful but certificate mapping does not exist for the user.*
The browser call does go through to the certificate provider, but the mapping is incorrect.	*Validation is successful but the certificate mapping does not match the user entered details.*

Table 2: Validate Certificate Screen Errors

10.3 Create Account Errors

Condition	Error Message
An attempt to create a FACTS account without the appropriate privileges.	You do not have sufficient privileges to grant (FACTS_SDC_MGR_ROLE) to this organization (United States).

Table 3: Create Account Errors