STEP 5: ASSIGN USERS TO PROJECTS

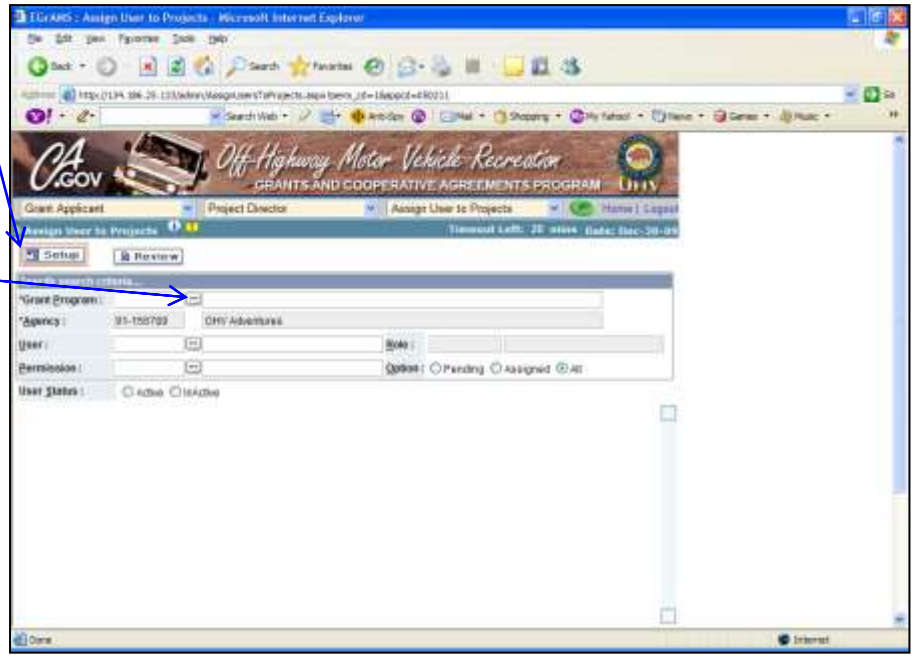
Only those users identified as the agency's Project Director may grant access and assign users permission to work on projects. If you are not identified as the Project Director for your agency, then you will not be able to perform this function.

Step 1 – From the "Assign Users to Projects" screen, click the "Setup" button.

This action will "refresh" the screen.

Click the 'Show Lookup' button for "Grant Program"

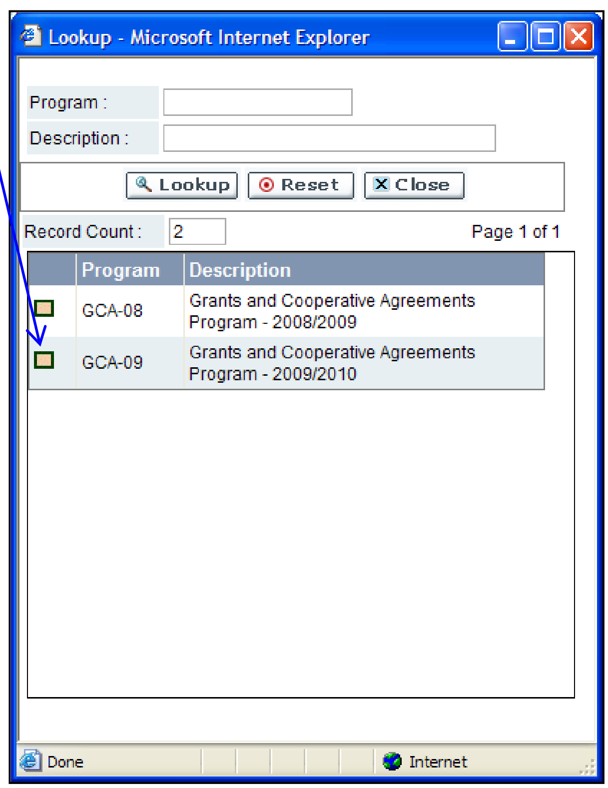
This action will display the screen in Step 2.



Step 2 – Click the appropriate box to select the 'Grants and Cooperative Agreements Program'.

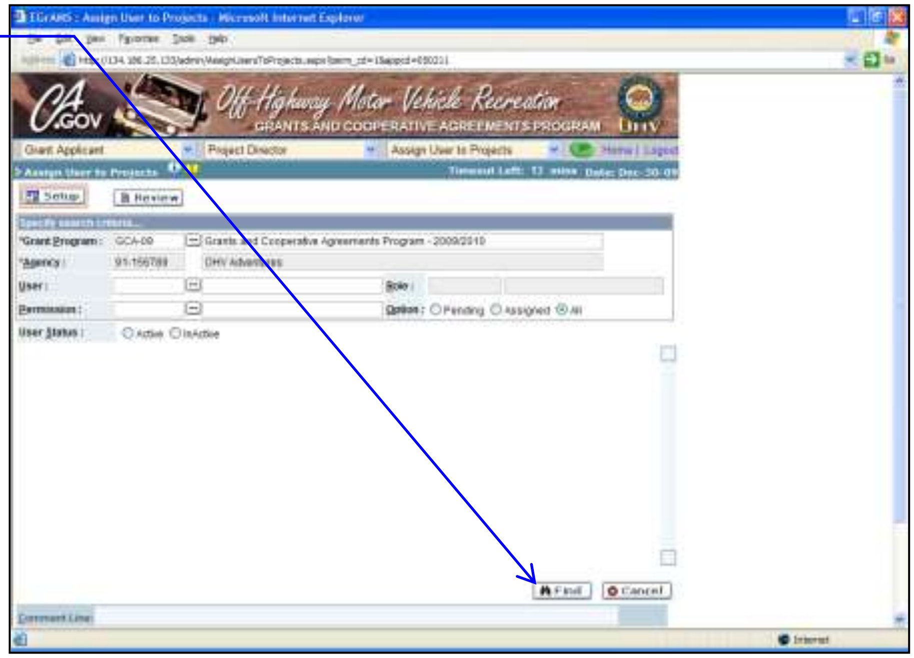
Your selection will automatically populate the "Grant Program" field in Step 1.

This action will display the screen in Step 3.



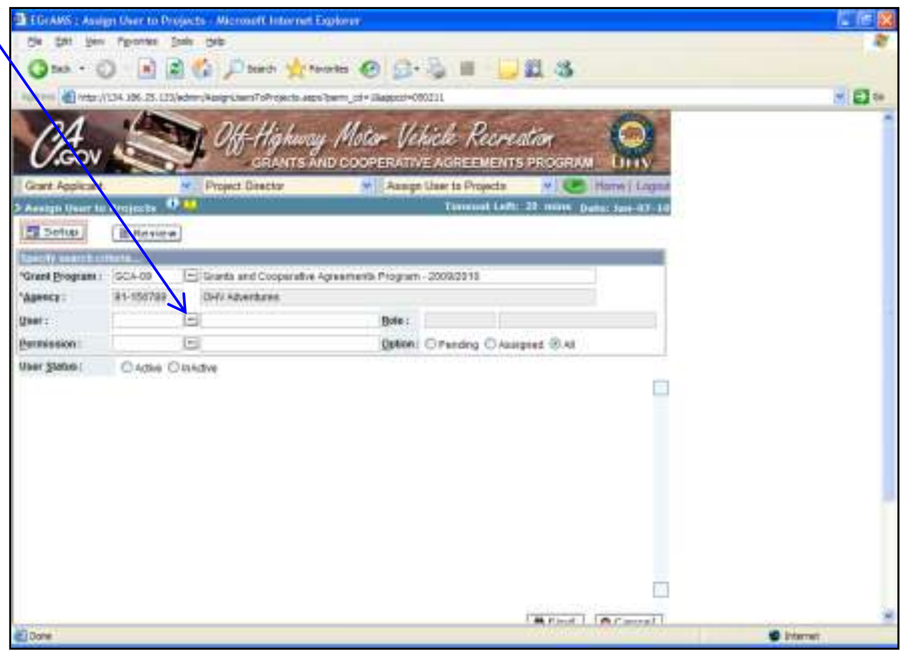
Step 3 – Click the Find button.

This action will display the screen in Step 4.



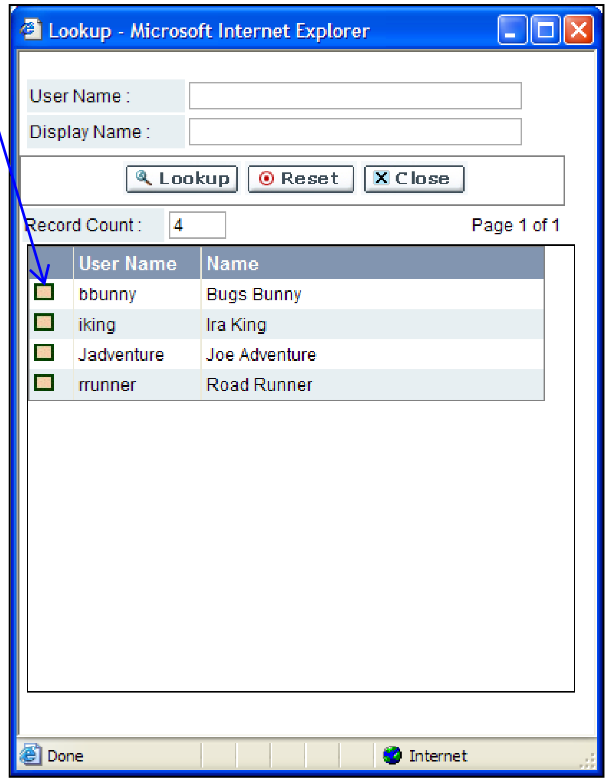
Step 4 – Click the ... 'Show Lookup' button for the "Users" field.

This action will display the screen in Step 5.



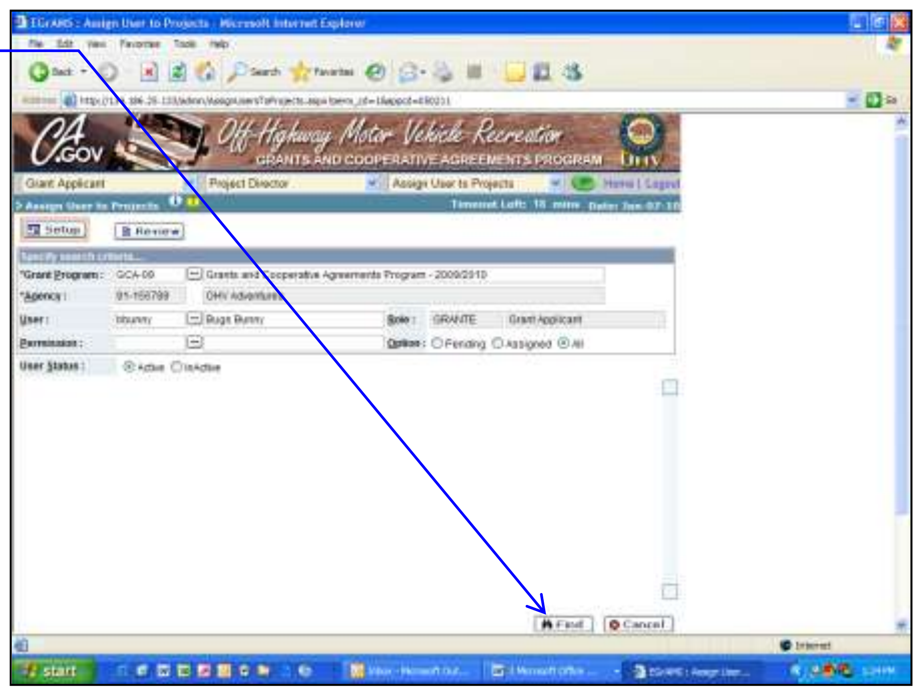
Step 5 – Click the appropriate box to select the user for whom you are assigning permissions.

This action will display the screen in Step 6.



Step 6 – Click the Find button at the bottom of the screen.

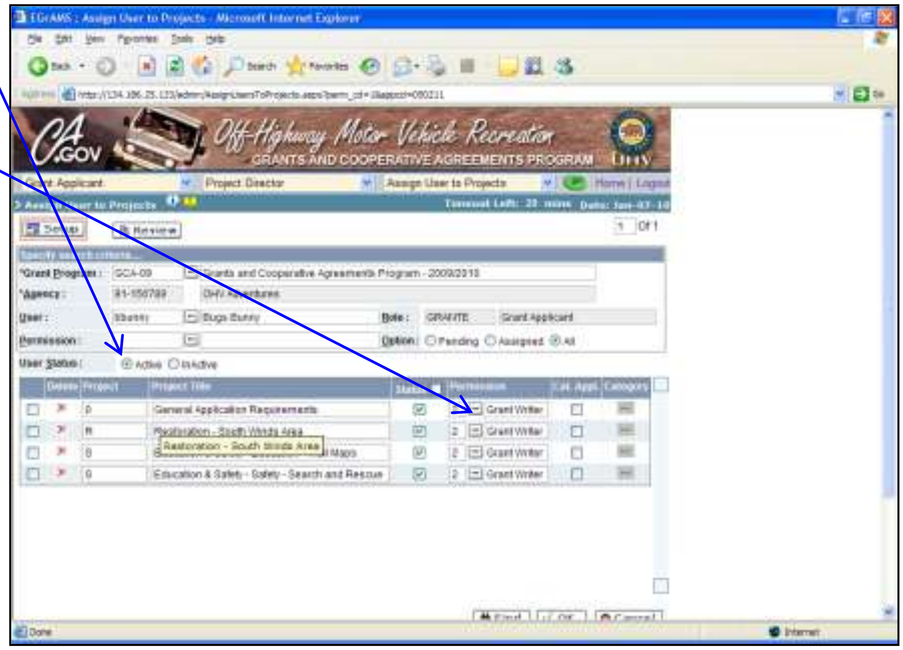
This action will display the screen in Step 7.



Step 7 – Verify “User Status” is defaulted to "Active".

Click the 'Show Lookup' button for "Permissions”

This action will bring up the screen in Step 8.



Step 8 – Click the appropriate box to select the description that fits the permission you want to assign the user for that project.

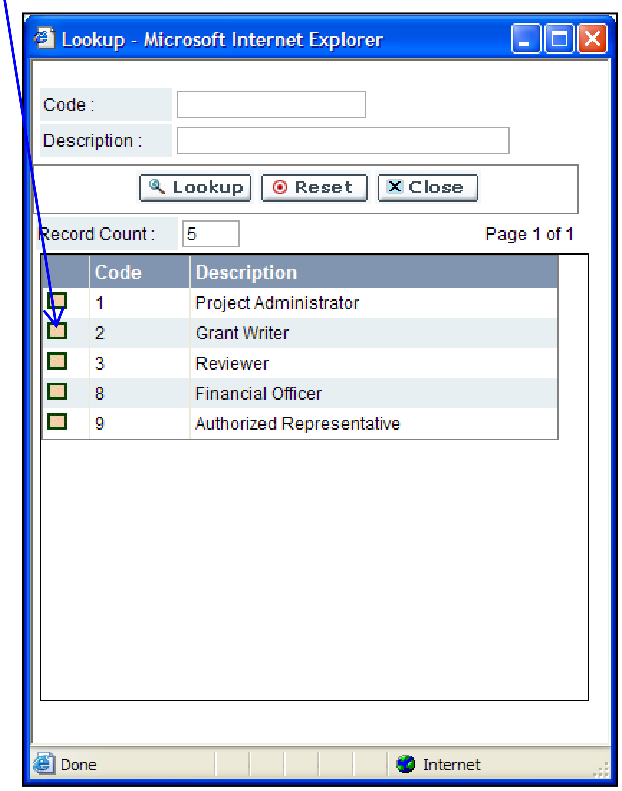
Your selection will automatically populate the "Permission" field.

Permissions:

- Project Administrator – responsible for performing the administrative tasks for the agency and has full access to the grant application
- Granter Writer – responsible for entering the grant application and has full access to the grant application
- Reviewer – responsible for reviewing the grant application
- Financial Officer – responsible for reviewing the budgetary aspects of the grant application
- Authorized Representative – responsible for approving contracts and payments

Note:

- Repeat Steps 7 and 8 for each project.
- See Step 10 if you want to limit user access within a project.



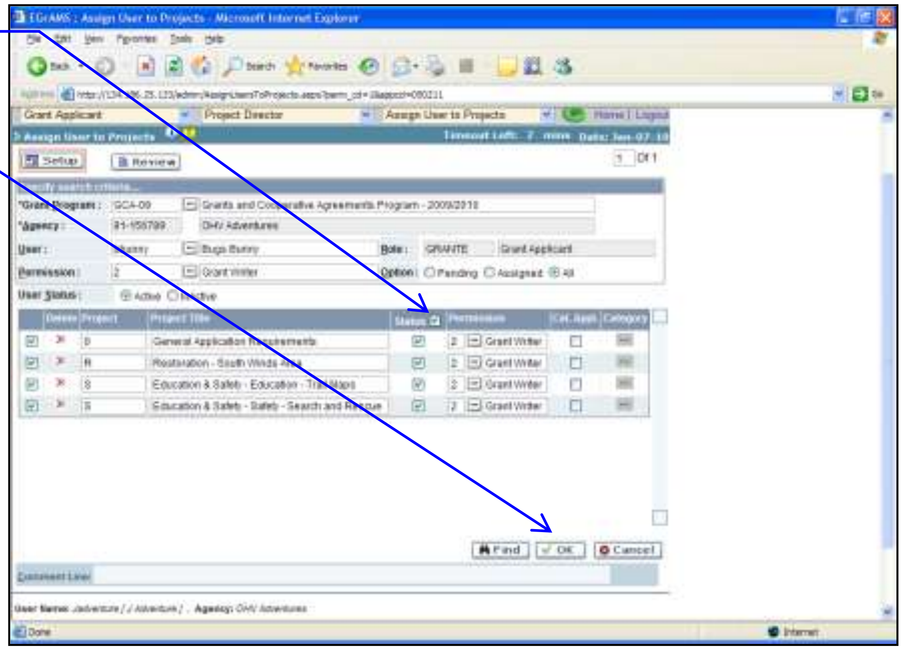
Step 9 – Click to check the "Status" box (this activates the permissions), then

Click the 'OK' button at the bottom of the screen to Save.

After clicking the 'OK' button, you should receive the following message:

If not, you must correct the errors to complete 'Assign Users to Projects'.

Note: Repeat Steps 4 – 9 to assign permission to other users.



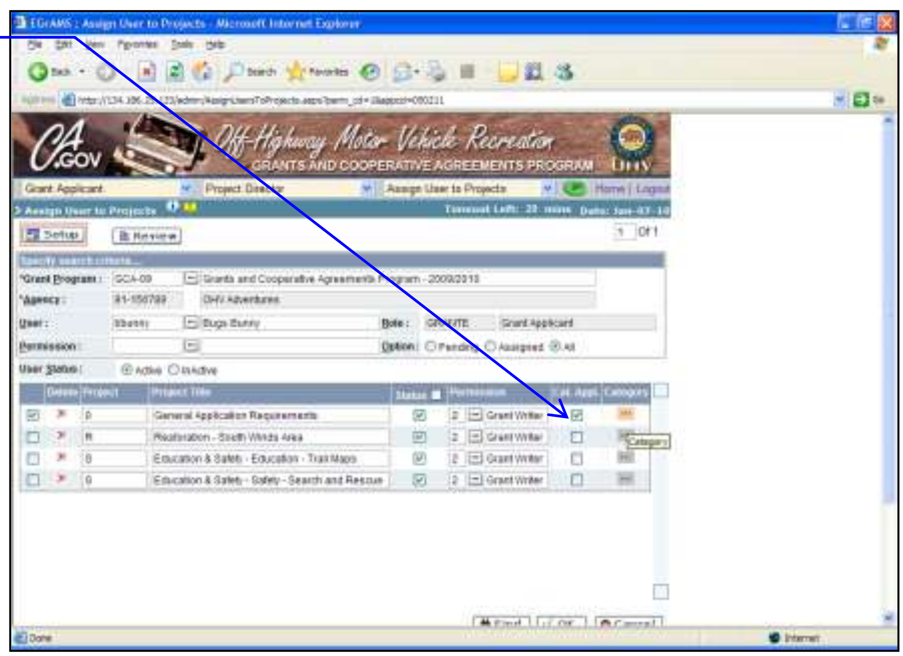
Step 10 – If you want to limit users' access within a project to:

- Read,
- Write, or
- No Access (NA)

Click to check the box under "Cat. Appl.", then

Click the "Category" button ···

This action will display the screen in Step 11.



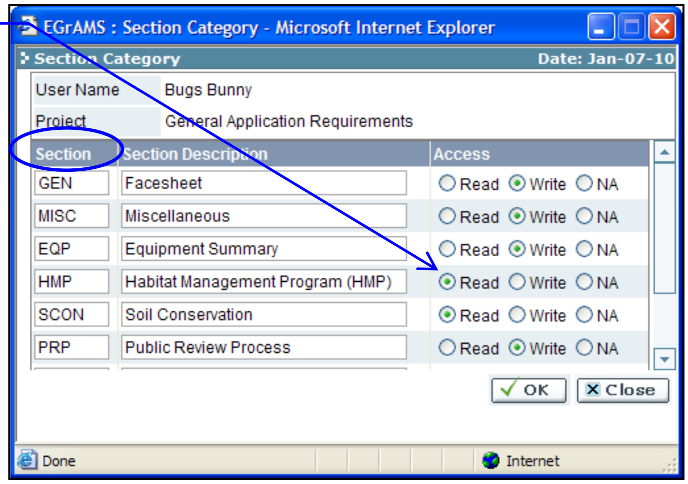
Step 11 – For each "Section", click the appropriate access option for the user

- Read,
- Write, or
- No Access (NA)

to the various sections of the project / application.

Once access options for each "Section" have been selected Click the 'OK' button to Save.

This action will display the screen in Step 12.



Step 12 – Repeat Steps 10 and 11 to limit Users' access as applicable for other projects.

Once complete, Click the 'OK' button at the bottom of the screen to Save.

After clicking the 'OK' button, you should receive the following message:

If not, you must correct the errors to complete 'Assign Users to Projects'.

Note: If you wish to remove "Cat. Appl." which limits Users' access within a project, then Click the "Cat. Appl." to uncheck this feature.

Once all Users have been assigned Click "Home".

This will return you to the "Welcome" screen.