

Managing Users in Utah Grants

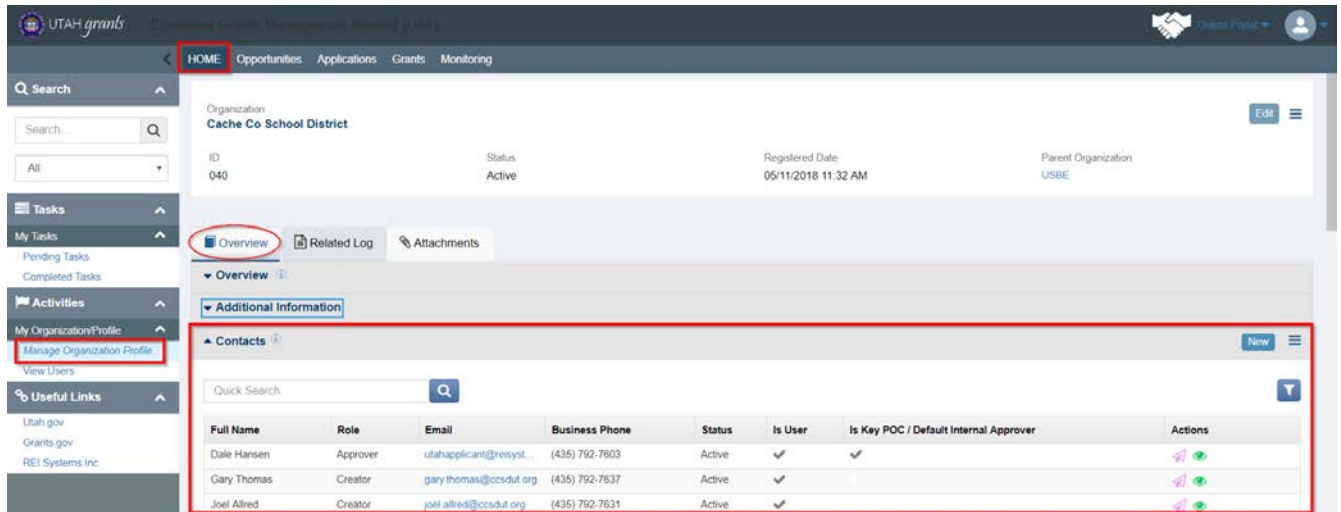
Key Point of Contact

Each organization assigns a single **Key Point of Contact (POC)**. The Key POC:







- Is assigned the Approver role and functionality
- Is copied on organization-level communications, award letters, etc.
- Manages the organization’s profile and users (user access administrator)
- Is the default internal approver on submissions to USBE (this task can be reassigned by the Creator to another individual with the role of Approver, if appropriate).

Where to Locate User Information

From the Utah Grants Home screen, select *Manage Organization Profile* (left pane). Users appear in the *Overview* sub tab in the *Contacts* section.

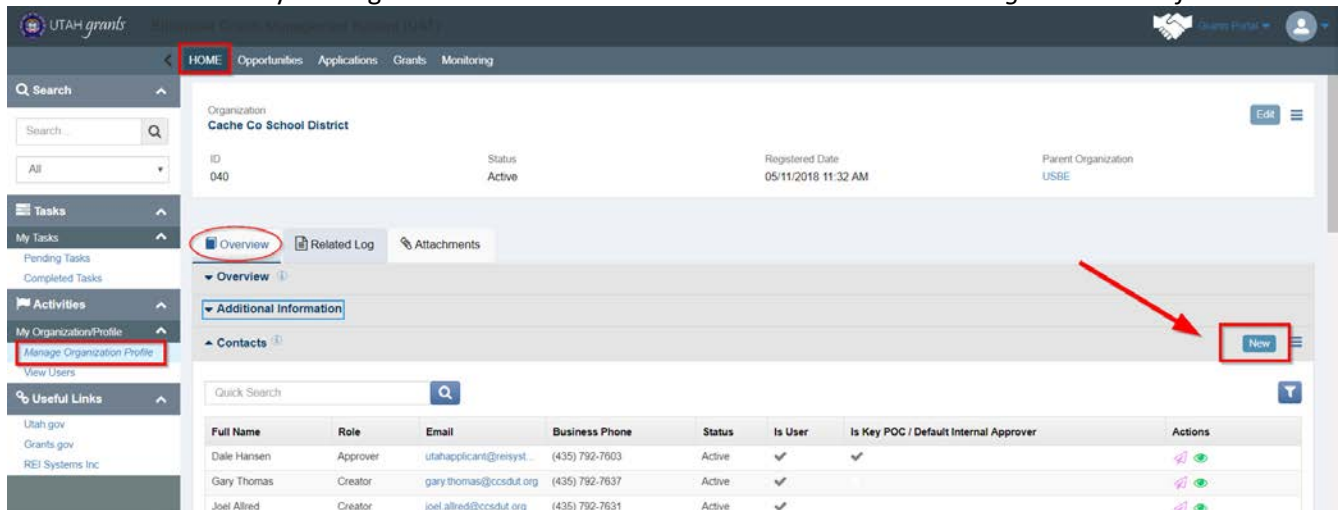


The screenshot shows the 'Manage Organization Profile' page for 'Cache Co School District'. The 'Overview' tab is selected, and the 'Contacts' section is expanded to show a table of users. The table has the following columns: Full Name, Role, Email, Business Phone, Status, Is User, Is Key POC / Default Internal Approver, and Actions.

Full Name	Role	Email	Business Phone	Status	Is User	Is Key POC / Default Internal Approver	Actions
Dale Hansen	Approver	utahapplicant@reisynt...	(435) 792-7603	Active	✓	✓	 
Gary Thomas	Creator	gary.thomas@ccsdut.org	(435) 792-7637	Active	✓		 
Joel Alfred	Creator	joel.alfred@ccsdut.org	(435) 792-7631	Active	✓		 

Adding New Users

The Key POC adds new users by clicking on the *New* button in the *Contacts* section of the *Organization Profile*.



The screenshot shows the 'Manage Organization Profile' page for 'Cache Co School District'. The 'New' button in the 'Contacts' section is highlighted with a red box and a red arrow.

The Key POC enters the information for the user. Selects the appropriate Role (See *User Roles* below), selects USBE as the *Sponsoring Agency* and clicks Save. Click the *Back* button to return to the *Organization Overview*.

Fields marked as * are required

Additional User Contact

Salutation: -None-

*Role: Creator

*Sponsoring Agency: USBE

*First Name: []

*Last Name: []

*Email: []

*Phone: []

New users will now appear in *Contacts* with a *Status* of New. Click the purple paper airplane icon to send the user an invitation to register.

Full Name	Role	Email	Business Phone	Status	Is User	Is Key POC / Default Internal Approver	Actions
Dale Hansen	Approver	utahapplicant@reisyst...	(435) 792-7603	Active	✓	✓	
Gary Thomas	Creator	gary.thomas@ccsdut.org	(435) 792-7637	Active	✓		
Joel Allred	Creator	joel.allred@ccsdut.org	(435) 792-7631	Active	✓		
Michael Liechty	Approver	mike.liechty@ccsdut.org	(435) 752-3925	Active	✓		
Paula Hull	Creator	utahapplicant@reisyst...	(435) 792-7617	Active	✓		
Clement Robin	Creator	robin.clement@ccsdut...	(435) 792-7615	Active	✓		
Robyn Hedgecock	Creator	robyn.hedgecock@ccs...	(435) 752-3925	Active	✓		
Steven Norton	Approver	steve.norton@ccsdut.org	(435) 752-3925	Active	✓		
Tim Smith	Creator	tim.smith@ccsdut.org	(435) 792-7627	Active	✓		
Roger singhal	Creator	psinghal0@gmail.com	(508) 542-0611	New			
John Test	Creator	rebecca.nielsen@scho...	(801) 538-7696	New			

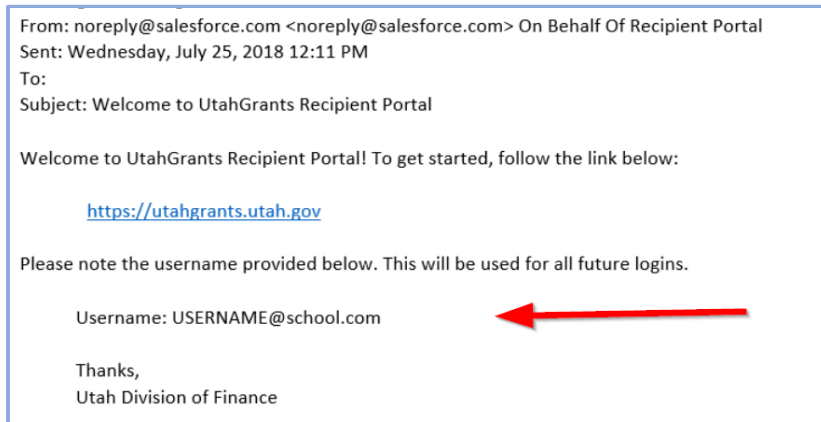
A *Send Invitation* form will open. Edit the email invitation (if necessary) and click Send. The new user will then receive an email with a link to complete their registration.

The user activation process is summarized below:



Utah Grants Username

The invitation email to Utah Grants will provide a prompt to access Utah Grants and establish a password. The username is included in the email message. **Please note that the username may not be the same as the user's email address.**



Removing or Changing User Access

To remove a user's access or to change a user's role, the Key POC should email the change request to UtahGrants@schools.utah.gov. Please include your organization's name, the user's name, and a description of the change request.

User Roles

Role	Utah Grants Activities	Typical Title
Creator	Read, create, and update: applications, payment requests, budget revisions and progress reports.	Business Manager Management Company Program Manager Management Company/Consultant
Approver*	Same as Creator <u>plus</u> approve & submit grant applications, payment requests, budget revisions and progress reports.	Vice President, CEO, CFO Business Administrator Superintendent Director of Finance

*An Approver can create or initiate a task, but cannot approve their own task. A different user with an Approver role must approve the transactions. See *Subrecipient User Roles* for more information.

New User Access to Applications

When an application announcement is published in Utah Grants, a task is sent to each **active** user in the organization. **New users activated after an announcement is published will not have access to that task.** If it is necessary for the new user to own the task of completing the application, please email utahgrants@schools.utah.gov with the organization's name, user's name, and the name of the application to be assigned.

Need Help?

Contact the Utah Grants team

Email: UtahGrants@schools.utah.gov
Phone 801-538-7604