

Managing Users in Utah Grants

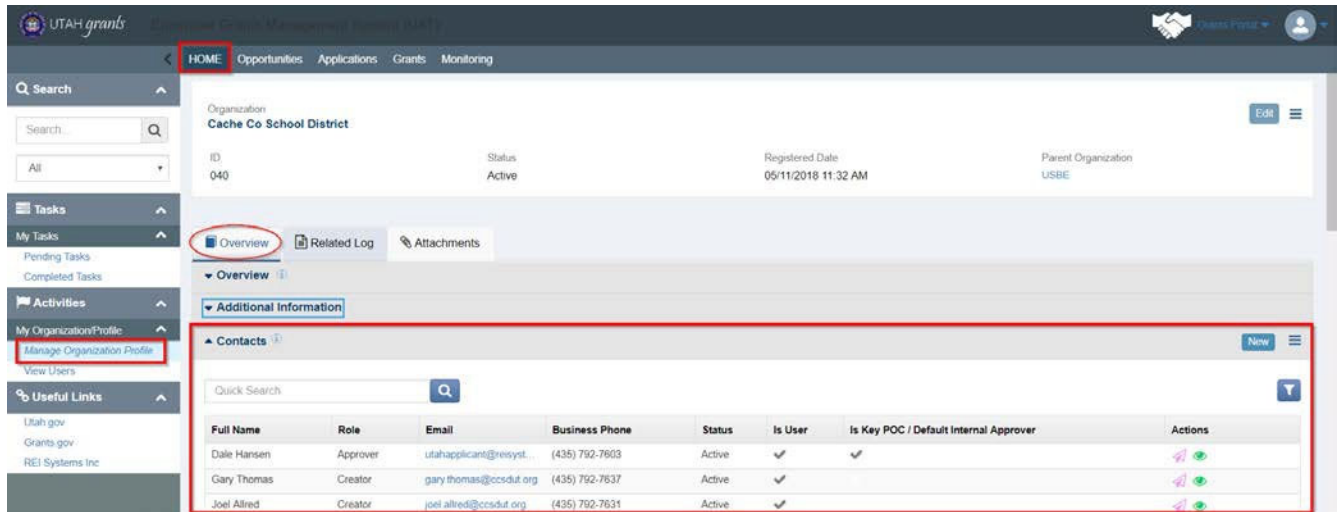
Key Point of Contact

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.



Organization: **Cache Co School District**

ID: 040 Status: Active Registered Date: 05/11/2018 11:32 AM Parent Organization: USBE

Overview | Related Log | Attachments

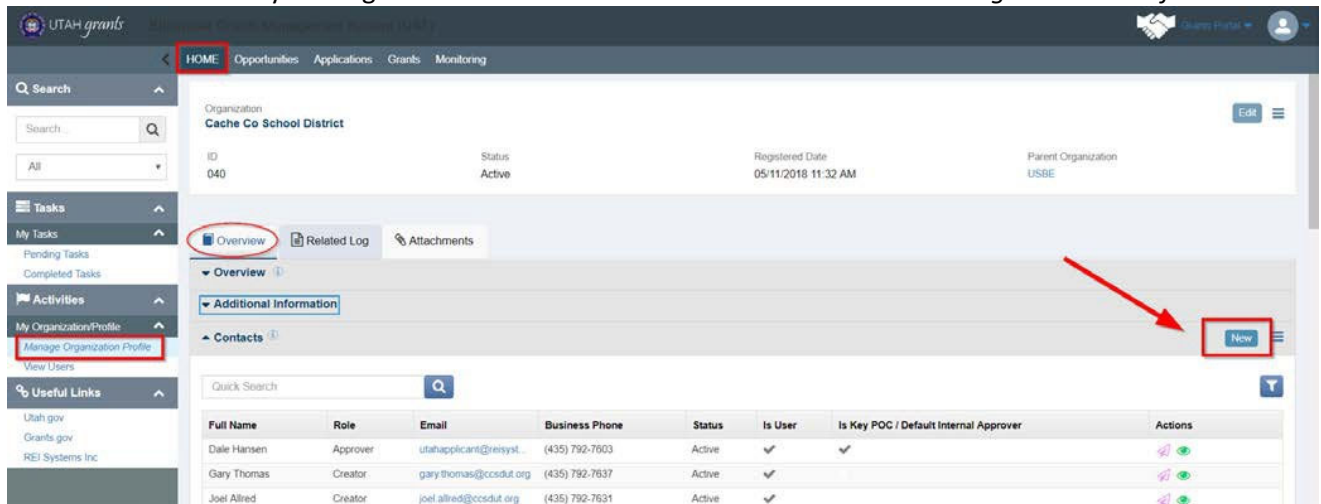
Additional Information

Contacts

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

Adding New Users

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



Organization: **Cache Co School District**

ID: 040 Status: Active Registered Date: 05/11/2018 11:32 AM Parent Organization: USBE

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Contacts

[New]

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

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*.

Create Contact

Cancel Save

Fields marked as * are required

Additional User Contact

Salutation: --None--

*First Name: [text box]

*Email: [text box]

*Role: Creator

*Last Name: [text box]

*Sponsoring Agency: USBE

*Phone: [text box]

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.

Contacts

Quick Search [text box]

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

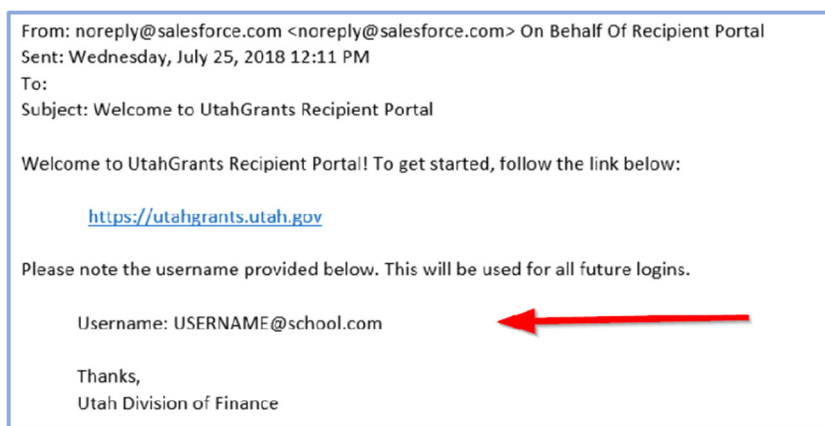
A *Send Invitation* form will open. Edit the email invitation (if necessary) and click Send. The new user will then receive an email with a link to complete their registration.

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.

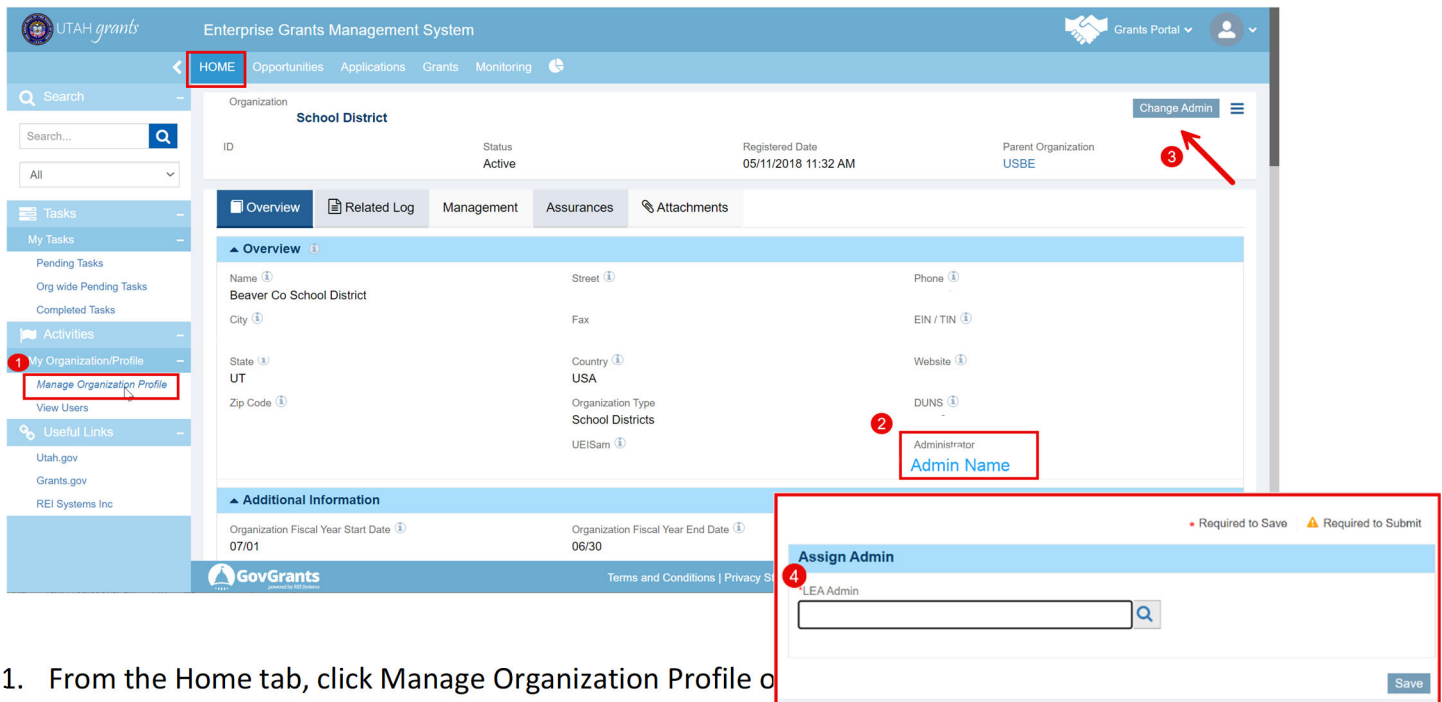
Need Help?

Contact the Utah Grants team

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

Subrecipient Administrator Role

The Subrecipient Administrator is a new role within Utah Grants. The Administrator has the same access and permissions as the Subrecipient Key Point of Contact, including requesting new users and changing the application owner. The Administrator must be an active user in the Approver role.



The screenshot displays the 'Enterprise Grants Management System' interface. The top navigation bar includes 'HOME', 'Opportunities', 'Applications', 'Grants', and 'Monitoring'. The left sidebar contains 'Tasks', 'My Tasks', 'Activities', 'My Organization/Profile', and 'Useful Links'. The main content area shows the 'Overview' tab for a 'School District' organization. Key fields include 'Name' (Beaver Co School District), 'City' (UT), 'State' (UT), 'Country' (USA), 'Organization Type' (School Districts), and 'DUNS' (School Districts). A 'Change Admin' button is visible in the top right corner. A red box highlights the 'Assign Admin' pop-up window, which contains a search bar for 'LEA Admin' and a 'Save' button. Red numbers 1 through 4 indicate the steps: 1. Click 'Manage Organization Profile' in the sidebar. 2. The Administrator is shown in the 'Overview' tab. 3. The 'Change Admin' button is highlighted. 4. The 'Assign Admin' pop-up window is shown.

1. From the Home tab, click Manage Organization Profile of the organization.
2. The Administrator will be shown on the organization Overview tab.
3. The Key Point of Contact and the current Administrator will see a "Change Admin" button.
4. A pop-up window will appear. The user is able to select the new administrator and save.

Note: The Administrator will be pre-assigned as the Subrecipient Key Point of Contact. The Key Point of Contact can reassign the role to another active user with a role of "Approver." Therefore, the Administrator role can be changed by either the Key Point of Contact or the current Administrator.

The administrator role can request new users, change user permissions, and change application ownership. Additional administrator permissions and responsibilities will be added with future updates.

The Key Point of Contact will continue to be the default Internal Approver on applications and payment requests.

Subrecipient User Roles

Transaction Workflow

Utah Grants utilizes a 2-step process for items submitted by subrecipients to the USBE. This 2-step process is used for the submission of grant applications and revisions, budget revisions, payment requests and progress reports.

An individual with a role of **Creator** is the first step, while the **Approver** is the second. The **Approver** role should be limited to individual(s) who can legally bind the organization.

To allow for flexibility within an organization, an individual in an **Approver** role can create or initiate a task, but cannot approve their own task. A separate **Approver** would be needed for the 2-step approval process.



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, plus approve & submit grant applications, payment requests, budget revisions, and progress reports.	Vice President, CEO, CFO Business Administrator Superintendent Director of Finance

Key Point of Contact

Each organization will need to assign a single Key Point of Contact (POC). This individual will be assigned the **Approver** role and functionality. Additionally, this individual will be copied on organization-level communications, award letters, etc. This individual manages the organization profile and users (user access administrator). Default individual for approvals (unless changed by the creator).

Adding New Users

The Key POC is responsible for user access in Utah Grants. Please see *Managing Users in Utah Grants* for more information.

Questions

If you have questions, please contact:

Utah Grants Help Line UtahGrants@schools.utah.gov
(801) 538-7604