Recipient Administrator Guidance

NOAA Grants Online Program Management Office

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You have been identified as a Recipient Administrator for your organization. With the assignment of this important role, you must identify the users responsible for completing reports and performing other administrative tasks associated with the terms of the award. This document provides information that will facilitate management of the Recipient Administrator tasks. Please note, the Grants Online Help Desk **is not** responsible for the creation and management of Recipient accounts.

Create an account for a new user

1. Log in to Grants Online https://grantsonline.rdc.noaa.gov/ using your Recipient Administrator account.
2. Click the ***Awards*** tab.
3. Click the **Manage Recipient Users** link.
4. Click the **Add another user** link (typically at the bottom of the screen).
5. From the ***Select Organization*** landing page…
    - if you are the Recipient Administrator for more than one organization, you must select the organization with which the new user will be associated. Click the **Select** button.
    - if you are the Recipient Administrator for one organization, you will not need to select an organization.
6. Complete information on the ***Create Recipient User*** landing page:
    - All fields with a red asterisk are mandatory.
    - ***See the chart on the next page for an explanation of user roles.***
    - **Carefully select** the User Role for the account being created; the default role is Recipient User (Key Personnel).

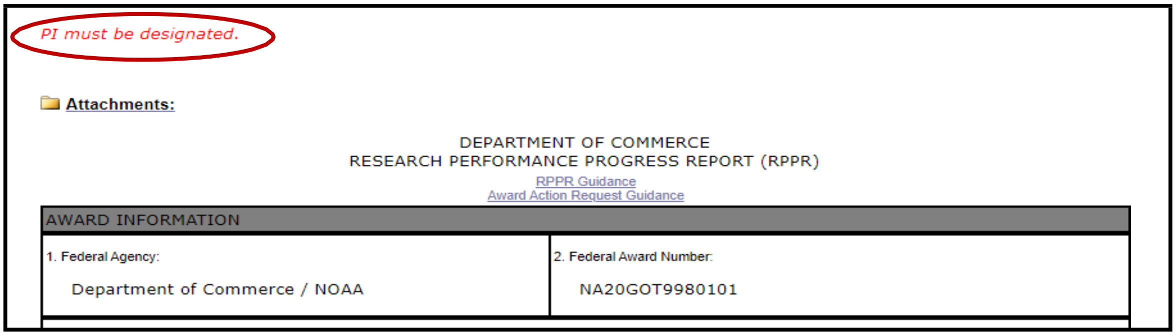
      NOTE: If a new user is assigned the Recipient User role, he/she will have limited access to the organization's awards.
7. Click the **Save** button to retain the information entered and generate a unique user name.
8. Click the **Reset Password** button.
9. In response to the "Are you sure?" question re: whether the intent is to reset the password for the new user, click the **Reset** button.
10. A new password displays on the screen. This temporary password **must be** communicated when the user is provided with his/her user name. Make certain to inform the user that the temporary password is **valid until 11:59 pm (ET) on the day on which it was received.**
11. Click the **Done** button.

Definitions of the Grant Recipient User Roles	
User Role	**Responsibilities**
Recipient Authorized Representative (also referred to as the Authorized Representative)	Has signatory authority for official grant documents (e.g., SF-424). A person with this role may countersign Award documents (i.e., New Award, CD-450, or amendment (CD-451)). More than one person may have this role at an organization. For each award, only one person is designated as the primary Authorized Representative.
Recipient Administrator	Has permission to set-up other people in his/her organization as Grants Online users. The Recipient Administrator can also give a user access, as appropriate, to specific awards.
Business / Financial Representative (BIZ/FIN)	Can initiate Award Action Requests and prepare Federal Financial Reports (FFRs). The person with this role ***cannot*** submit the FFR directly to the Federal agency; he/she must send it to his/her organization's Authorized Representative.
Business / Financial Representative – Submitting (BIZ/FIN)	Has the same role as the Business / Financial Representative. However, a person with this role ***may*** submit the FFR directly to the Federal agency without routing it through an Authorized Representative.
Principal Investigator / Project Director (PI/PD)	Can initiate Award Action Requests and complete Performance Progress Reports (PPRs). A person with this role ***cannot*** submit the PPR directly to the Federal agency; he/she must send it to his/her organization's Authorized Representative.
Principal Investigator / Project Director – Submitting (PI/PD)	Has the same role as the Principal Investigator / Project Director. However, a person with this role ***may*** submit the PPR directly to the Federal agency without routing it through an Authorized Representative.
Key Personnel (Recipient User)	Can view assigned awards for the organization and initiate Award Action Requests. A person withthis role must submit documents to the organization's Authorized Representative. The Authorized Representative will review and submit documents to the agency.
More than one user can have the same role. A single user can have more than one role.	

The Principal Investigator/Project Director (PI/PD) is not identified

For an award where all or a part of the award is used to conduct research, a PI/PD **must be** specified. If a PI/PD is not identified, the person tasked with submitting the Research Performance Progress Report (RPPR) will not be able to submit the report until the PI/PD role is specified.

The image below shows the error message displayed to the Authorized Representative or the Recipient User (Key Personnel) tasked with submitting the RPPR when the PI/PD role **is not** specified.


PI must be designated.

Attachments:

DEPARTMENT OF COMMERCE
RESEARCH PERFORMANCE PROGRESS REPORT (RPPR)
RPPR Guidance
Award Action Request Guidance

AWARD INFORMATION	
1. Federal Agency: Department of Commerce / NOAA	2. Federal Award Number: NA20GOT9980101

Add the Principal Investigator/Project Director (PI/PD)

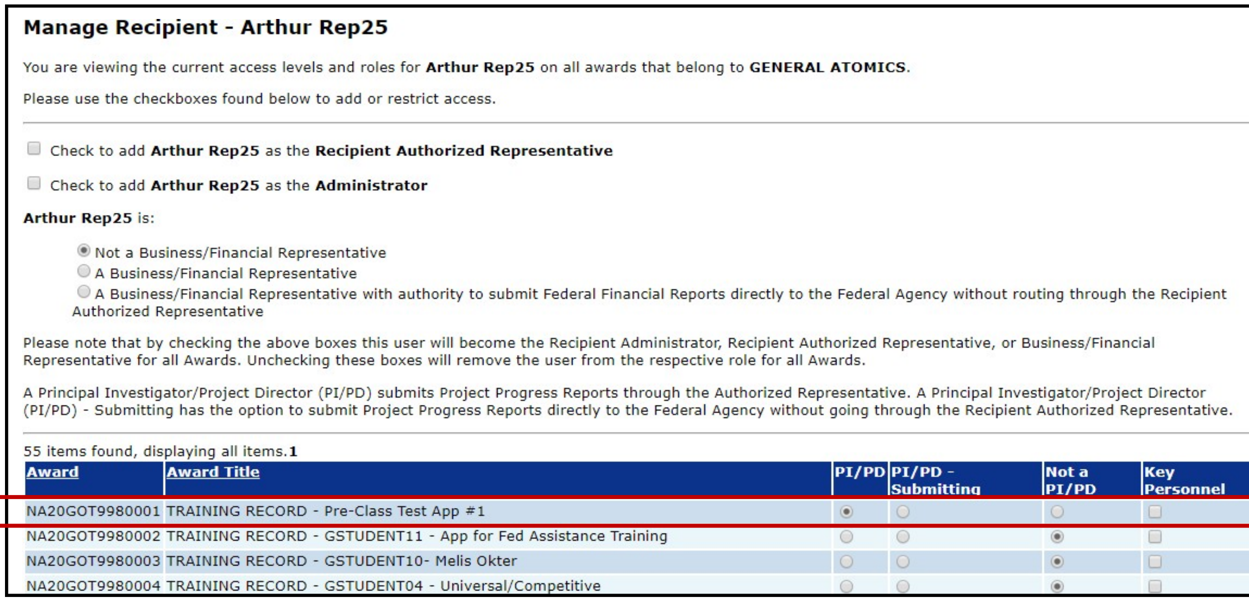
1. Log in to Grants Online https://grantsonline.rdc.noaa.gov/ using your Recipient Administrator account.
2. Click the ***Awards*** Tab.
3. Click the **Manage Recipient Users** link.
4. If you are the Recipient Administrator…
    - for more than one organization, you **must** select the appropriate organization from the dropdown menu. Click the **Select** button and the names of all registered users are visible.
    - for one organization, all users in your organization should be visible. Advance to step 6.
5. If the user …
    - does not have a Grants Online account, follow steps 4 – 11 in the Create an account for a new user section of this document.
    - has a Grants Online account, proceed to the next step.

6. In the Action column, click the **Manage Award Access** link.

   NOTE: You may need to again select the appropriate organization (if you are the Recipient Administrator for more than one organization). From the dropdown menu, choose the organization. If you are the Recipient Administrator for one organization, proceed to the next step in the process.

7. Use the radio buttons and the check boxes on the **Manage Recipient – {Username}** screen to specify the roles and therefore the actions the user will be permitted to perform.
8. As shown below, a radio button is used to indicate the user we want to assign the PI/PD role.

   NOTE: Select the radio button (either PI/PD or PI/PD submitting) in the row that corresponds to the award number for which you are making the assignment.



Manage Recipient - Arthur Rep25

You are viewing the current access levels and roles for **Arthur Rep25** on all awards that belong to **GENERAL ATOMICS**.

Please use the checkboxes found below to add or restrict access.

Check to add **Arthur Rep25** as the **Recipient Authorized Representative**

Check to add **Arthur Rep25** as the **Administrator**

Arthur Rep25 is:

Not a Business/Financial Representative
A Business/Financial Representative
A Business/Financial Representative with authority to submit Federal Financial Reports directly to the Federal Agency without routing through the Recipient Authorized Representative

Please note that by checking the above boxes this user will become the Recipient Administrator, Recipient Authorized Representative, or Business/Financial Representative for all Awards. Unchecking these boxes will remove the user from the respective role for all Awards.

A Principal Investigator/Project Director (PI/PD) submits Project Progress Reports through the Authorized Representative. A Principal Investigator/Project Director (PI/PD) - Submitting has the option to submit Project Progress Reports directly to the Federal Agency without going through the Recipient Authorized Representative.

55 items found, displaying all items.**1**

Award	Award Title	PI/PD	PI/PD - Submitting	Not a PI/PD	Key Personnel
NA20GOT9980001	TRAINING RECORD - Pre-Class Test App #1				
NA20GOT9980002	TRAINING RECORD - GSTUDENT11 - App for Fed Assistance Training				
NA20GOT9980003	TRAINING RECORD - GSTUDENT10- Melis Okter				
NA20GOT9980004	TRAINING RECORD - GSTUDENT04 - Universal/Competitive				

9. Click the **Assign** button.
10. The message, ***"The Save was successful, this User's Roles and Award Assignments have been modified accordingly."*** indicates completion of the requested task.
11. Click the **Cancel** button to return to the previous screen.

Update an existing user's password

1. Log in to Grants Online https://grantsonline.rdc.noaa.gov/ using your Recipient Administrator account.
2. Click the ***Awards*** Tab.
3. Click the **Manage Recipient Users** link.
4. If you are the Recipient Administrator…
   - for more than one organization, you must select the appropriate organization from the dropdown menu. Upon selecting an organization,the names of all registered users are visible.
   - for one organization, all users in your organization should be visible.
5. Locate the user, within that organization, on whose account you would like to work.
6. In the Action column, click the **Edit Profile** link.
7. To reset the password, click the **Reset Password** button.
   - Resetting password for: **{Username}.**
   - Are you sure?
   - Click the **Reset** button.
   - Ask the user to write the temporary password on a piece of paper.
   - Emphasize that the password is **case sensitive**.
   - Inform the user that the temporary password is **valid until 11:59 pm (ET) on the day on which it was received**.
   - Click the **Done** button.
8. Ask the user to log on to his/her account using the temporary password.
9. When the temporary password is correctly typed, the user is logged on to Grants Online and presented with a data entry screen.
10. Instruct the user to type the temporary password (***old password***).
11. Ask the user to create a ***new password*** that meets the requirements listed below. Emphasize that the password is **case sensitive**.
    - A minimum of 12 non-blank characters; the first character must be alphabetic; there must be one upper case character; one lower case character; one number (0-9); one special character – hash tag or pound symbol (#), underscore (_) or dollar sign ($).
    - Six of the characters may only occur once in the password.
    - Prior passwords cannot be re-used (i.e., at least three characters must be different than a previously-used password).
    - The ***new password*** can't contain a part of the user's name or account name.
12. The user should be instructed to type the ***new password*** and then confirm the ***new password.***
13. Upon successfully typing and confirming a ***new password***, the user is returned to the Grants Online login screen.
14. The user should be able to login to Grants Online using the newly-created password.

Unlock a user’s account

1. Log in to Grants Online https://grantsonline.rdc.noaa.gov/ using your Recipient Administrator account.
2. Follow steps 2 – 6 under the Update an existing user's password section.
3. Click the **Unlock Account** button.
4. The message ***“User account successfully unlocked.”*** indicates completion of the requested task.
5. Instruct the user to login using what they believe to be the last used password. If the first two attempts are not successful (and you are certain they have the correct username), follow the steps to reset the user’s password.

Specify or update a user role

1. Log in to Grants Online https://grantsonline.rdc.noaa.gov/ using your Recipient Administrator account.
2. Click the ***Awards*** Tab.
3. Click the **Manage Recipient Users** link.
4. If you are the Recipient Administrator…
   - for more than one organization, you must select the appropriate organization from the dropdown menu. The names of all registered users are visible.
   - for one organization, all users in yourorganization should be visible.
5. Locate the user, within that organization, whose account you would like to manage.
6. In the Action column, click the **Manage Award Access** link.
7. If you are the Recipient Administrator…
   - for more than one organization, you may need to again select the appropriate organization from the dropdown menu.
   - for one organization, proceed with the next step.
8. Use the radio buttons and the check boxes on the **Manage Recipient – {Username}** screen to specify the roles and therefore the actions the user will be permitted to perform.
9. Click the **Assign** button.
10. The message, ***“The Save was successful, this User’s Roles and Award Assignments have been modified accordingly.”*** indicates completion of the requested task.
11. Click the **Cancel** button to return to the previous screen.

Disassociate a user account

1. Complete steps 1–9 under the previous section Specify or update a user role.
2. While on the **Manage Recipient – {Username}** screen, on a separate piece of paper(or by printing the current screen), note the user's current role(s).
3. **DO NOT click** the **Disassociate User** button although this may seem like the next logical step. Just below the **Disassociate User** button there are two important Notes:
   a. Please note that this will remove **all** roles and access to awards that this user holds in this Organization!
   b. You may need to submit and get approval on a **Change in Key Personnel Award Action Request** before you take this action. Please refer to the Award Action Request Guidance document.
4. Click the **Inbox** tab**.**
5. Click the **Task Management** link.
6. On the resulting screen, you will have the opportunity to enter information. The more items for which you enter data, the narrower the search.
   - Search Criteria (the applicable role e.g., Recipient Authorized Representative)
   - Award Number
   - Last Name of User
   - Organization
7. Click the **Search** button.
8. If there are any tasks associated with the user account, those tasks must be reassigned to another user within the organization. Tasks should **only** be reassigned to a user who has the **same role**(s) (and therefore level of access) as the user to whom the tasks are currently assigned. If no tasks need to be reassigned, advance to step 13.
9. Click the **Reassign** button.
   - On the resulting screen, specify the last name of the user to whom the task should be reassigned. If the user has a common last name, enter the first nameor other information to narrow the search. To keep the search as efficient as possible, specify fewer rather than more data elements.
   - Click the **Search** button.
     - If the person is not an existing Grants Online user the ***"Nothing found to display. "*** message may be visible when the **Search** button is clicked.
     - If so, use the **Add a new user >>** link.
     - Refer to the steps in the Create an account for a new user section.
   - From the list of user names that are displayed, click the **Select** link next to the appropriate user's name.
   - As a fail-safe measure the system asks "Are you sure you want to reassign the following task to **{new user with the same role}**?
   - Click the **Yes** or **No** button.

- Repeat steps 10 – 15 as many times as is necessary to reassign all tasks.
- When you have removed all tasks, repeat steps 1-9 under the Specify or update a user role section.

10. When on the **Manage Recipient – {Username}** screen uncheck any checkboxes that are checked at the top of the screen. In addition, make certain all radio buttons are in an "inactive" state (e.g., the radio buttons for Not a Business/Financial Representative and Not a PI/PD are selected).
11. Click the **Assign** button.
12. At the top of the screen, just under the **Manage Recipient – {Username}** header, there is a message indicating that ***"The save was successful, this User's Roles and Award Assignments have been modified accordingly."***
13. Click the **Disassociate User** button.
14. The system returns to the Manage Recipients screen.
15. Look at the data in the Disassociated Date column for that user; the current date should be displayed.