3 Accounts Management

The Accounts Management function provides users, with appropriate permissions, the ability to manage user accounts and their organization's information. To access this function, complete the following steps:

User Account Management

Figure 1. Research Administration Homepage Screen

1. From the *Research Administration Homepage Screen* (Figure 1), the various Research Administration functions are displayed. The user can only access functions for which they have appropriate permissions. Access to Research Administration functions is dependent upon the user's assigned permissions.

2. Click the **Accounts Management** link to access this function within Research Administration.

3. The *Accounts Management Main Screen* (Figure 2) will be displayed.

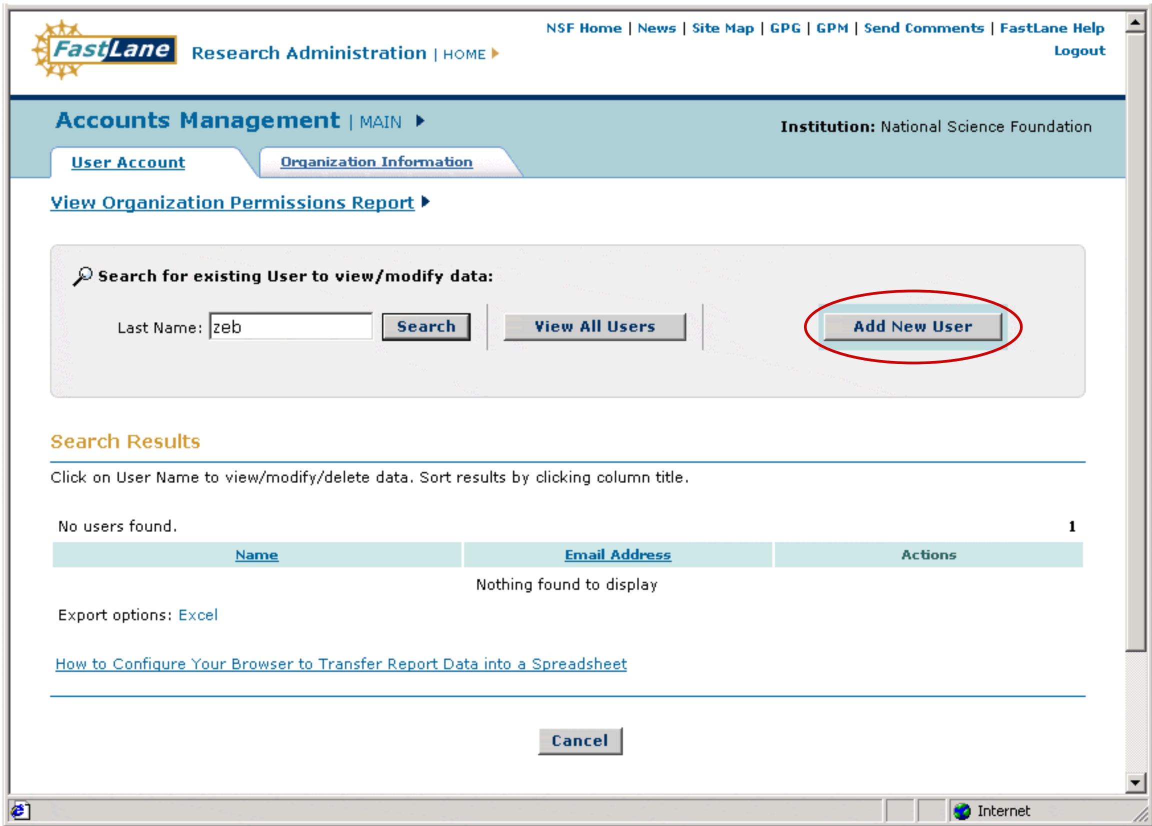

Figure 2. Accounts Management Main Screen

Search for, Add, Modify, and Delete FastLane Users

<u>Search for a FastLane User</u>

The *Accounts Management Main Screen* automatically goes to the *User Account* tab (Figure 2) allowing the user to perform a search on users associated with the designated organization. To be able to view and access the Search button, the user must have the permission to "Add, Modify, and Delete FastLane User". There are three different ways to search for a FastLane user:

1. Enter a specific name or key text of a name in the **Last Name** field and clicking on the **Search** button. The search results will be displayed under the Search Results portion of the User Account screen.

   Or

   Click the **View All Users** button.

   Or

Leave the Last Name field blank and click the **Search** button. The search results will be displayed under the Search Results portion of the User Account screen.

2. The search results are returned in alphabetical order by last name. The search results can be resorted by clicking on the **Name** or **Email Address** column header. The search results can also span multiple pages. The **Prev**, **Next** or numbered page links located above the **Actions** column can be used to access the other pages of search results. The search results can be exported into Microsoft Excel by clicking the **Excel** link next to the Export options label.

3. If a user is not listed in the search results, and the user would like to add a FastLane user, use the *Add a FastLane User* functionality described on Page 3-3.

4. To return to the Research Administration homepage, click on the **Cancel** button.

Add a FastLane User

To be able to view and access the Add New User button, the FastLane user must have the permission to "Add, Modify and Delete FastLane User". *It is important to verify that a user exists within the current FastLane database prior to clicking **Add New User**.* The following describes the process for adding a new FastLane user.

1. Click the **Add New User** button (circled in Figure 2) on the Accounts Management Main screen to access the *Add New User* function in Research Administration.

2. The *Add New User Screen* (Figure 3) will be displayed. The required data fields will have an asterisk next to text name of the field.

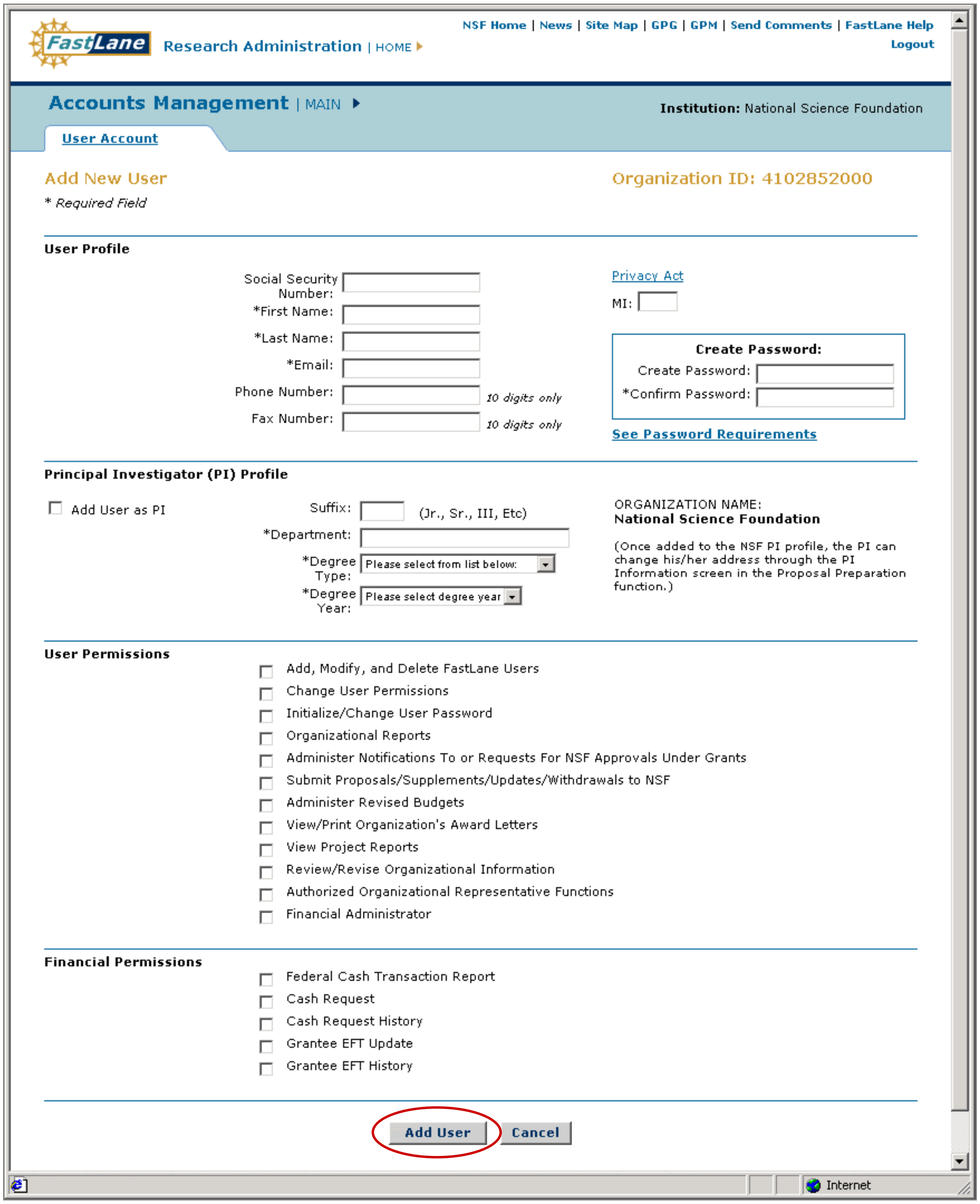

Figure 3. Add New User Screen

3. There are five sections within the *Add New User Screen* – User Profile, Create Password, Principal Investigator (PI) Profile, User Permissions, and Financial Permissions. Depending upon the FastLane user's permissions, the appropriate sections will be displayed. In this example (Figure 3), the FastLane user has all the permissions to administer all User Account functions.

4. The FastLane user can create the user profile, request to add the user as a Principal Investigator and assign the user's permissions. If the user does not want to use his/her own

SSN, a pseudo SSN will be generated by the FastLane system for that user. In order to create a user's password please complete the following action:

Type the password twice to ensure that the password is entered as intended. The password must be six to twenty characters long and must contain at least one alphabetic and one numeric character.

5. To add a user as a Principal Investigator, the **Add User as PI** checkbox must be selected and the Department, Degree Type and Degree Year fields must be filled in. The Degree Type and Degree Year are chosen from drop-down lists and the Department is free form text that should represent the PI's affiliation within the organization.

6. The User Permissions are for the organizational management of FastLane. Selecting the check box next to the permission description enables that permission for the user. Checks appearing in the box denote permission for that function. Financial Administrator permissions are available to all organizations that submit Federal Cash Transaction Reports (FCTR). Users who have the financial administrator permission can, in turn, assign the other financial permissions such as the Cash Request, Federal Cash Transaction Report, Cash Request History, Grantee EFT update and Grantee EFT history through the user account management feature of Accounts Management.

7. Once all the user data has been entered, click on the **Add User** button at the bottom of the screen (circled item on Figure 3).

8. The *View Add User Profile Screen* (Figure 4) will be displayed, providing the FastLane user with an opportunity to verify that the appropriate information has been entered before submission. If you are satisfied with the information, click **Confirm Add User** (circled in Figure 4) to submit the information to the FastLane system. To return to the previous data entry screen to modify the profile, click **Cancel**.

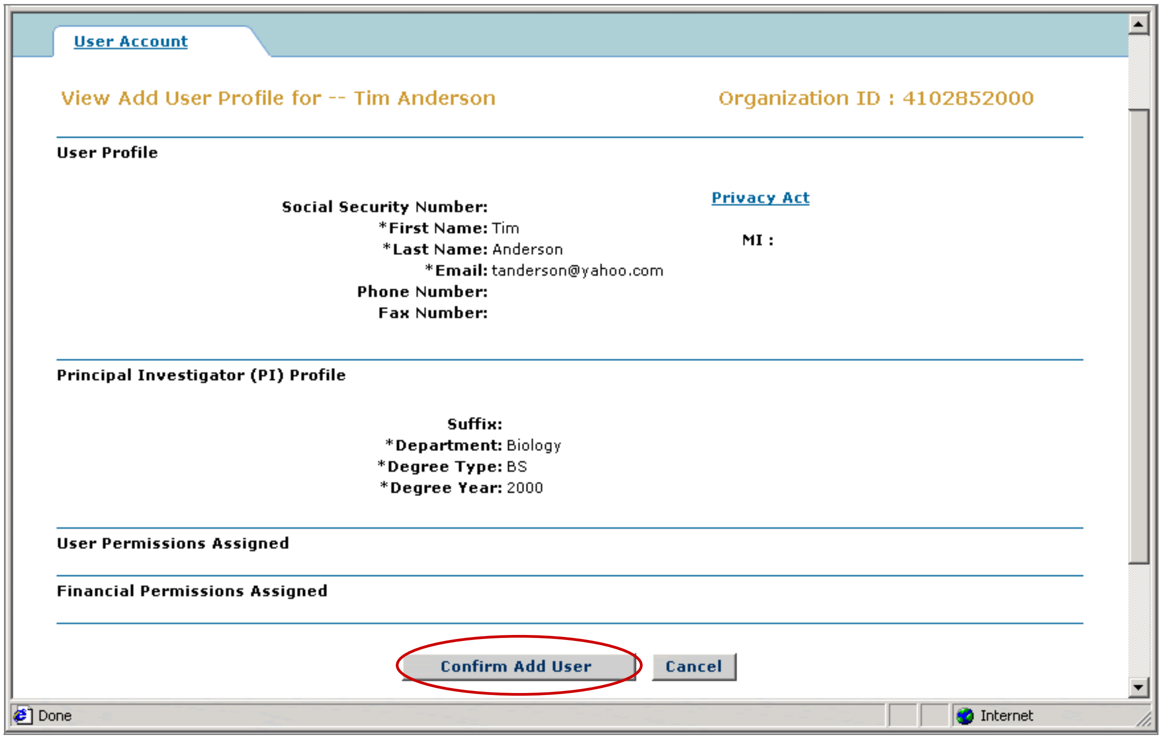

Figure 4. View Add User Profile Screen

9. *Add User Confirmation Screen* (Figure 5) will be displayed denoting that the user has been added successfully to the FastLane system.

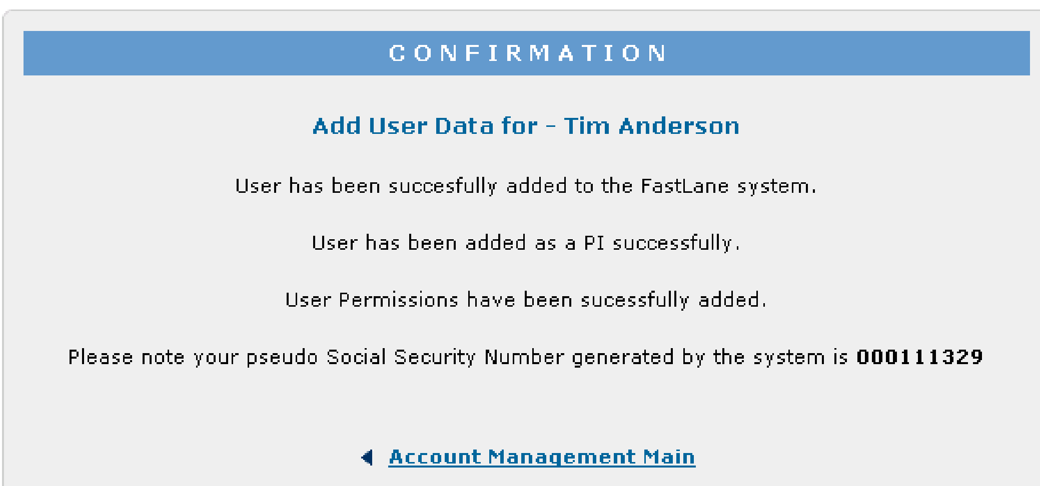

Figure 5. Add User Confirmation Screen

10. Click the **Account Management Main** link to return to the *Accounts Management Main Screen* (Figure 2).

Modify a FastLane User

To be able to view and access the Modify button, the FastLane user must have the permission to "Add, Modify and Delete FastLane User". The following describes the process for modifying a FastLane user:

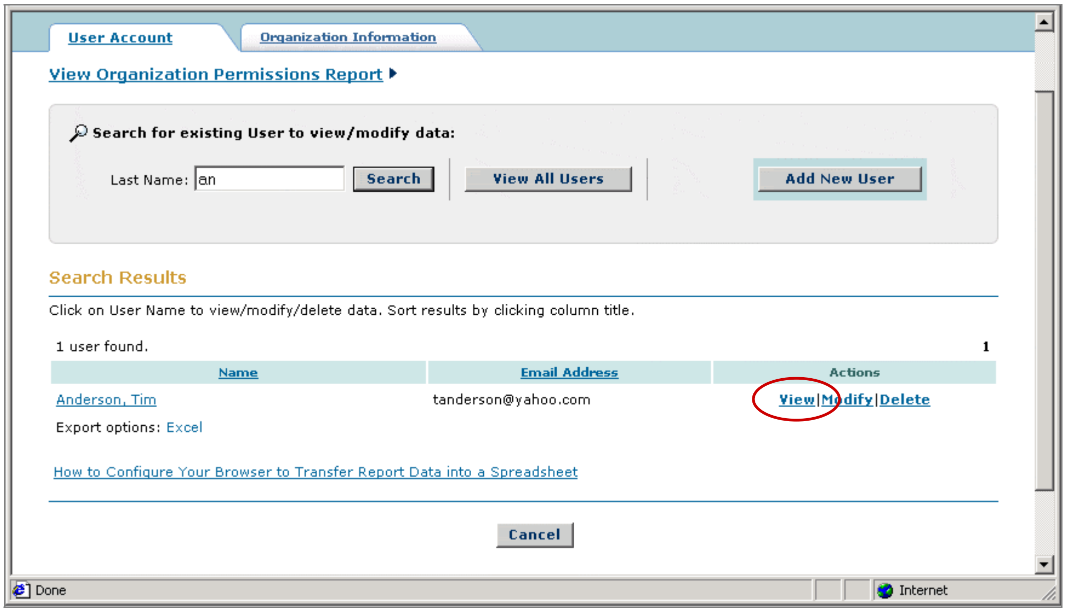

Figure 6. Search User Results Screen

1. Modify the user profile by two methods:

   Before modifications are made, the user can view the FastLane user by clicking on the user's name link in the **Name** column or the **View** link in the **Actions** column. The *View User Profile Screen* (Figure 7) displays when either of these links is clicked. The user selects **Modify User** and the *Modify User Profile Screen* (Figure 8) appears.

   Or

   The user can immediately modify a user profile by clicking the **Modify** link in the **Actions** column on the *Search User Results Screen* (Figure 6).

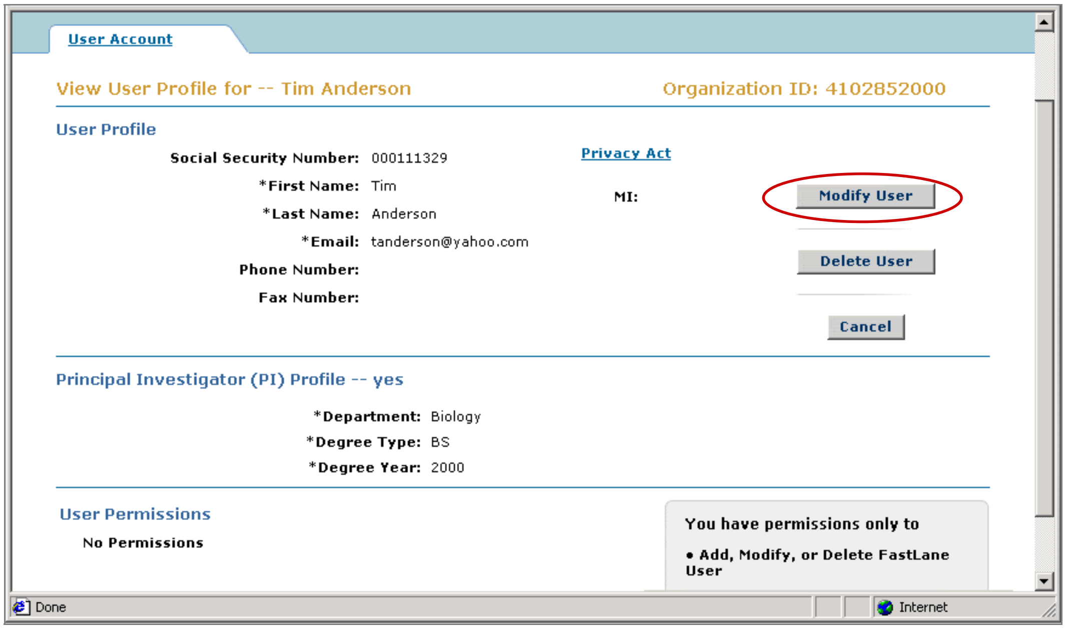

Figure 7. View User Profile Screen

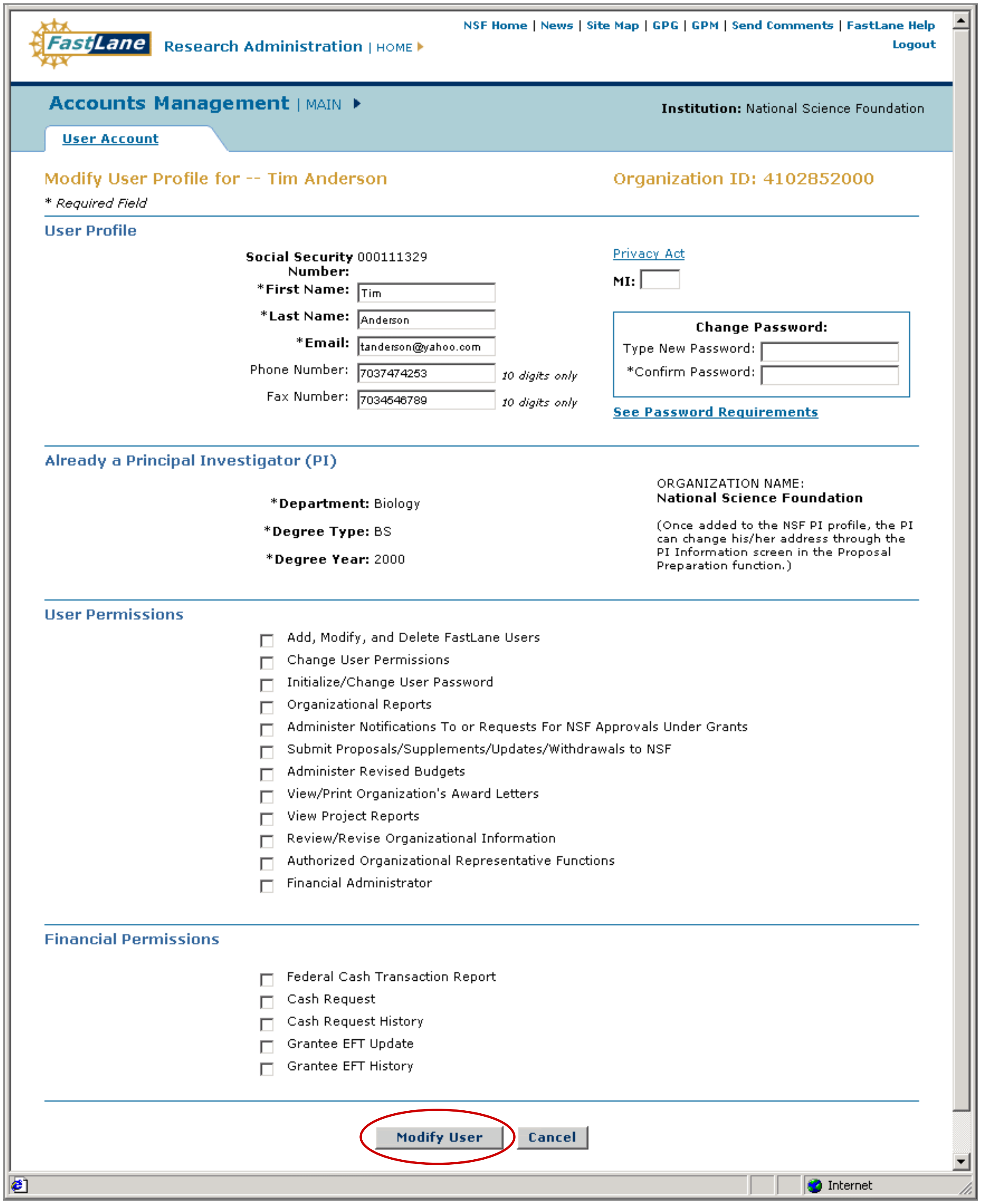

Figure 8. Modify User Profile Screen

2. On the *Modify User Profile Screen* (Figure 8), the FastLane user can modify the user profile, add the user as a Principal Investigator, and change the user's permissions. All the fields that have an asterisk next to them are required fields. The FastLane user can also change the user's password on this screen. To change a user's password the following action must be completed:

Enter in the password twice to ensure that the password is entered as intended. The password must be six to twenty characters long and must contain at least one alphabetic and one numeric character.

** NOTE: Because an e-mail message is sent whenever a password is changed, it is extremely important to have correct e-mail addresses saved in the FastLane system.*

3. Click on the **Modify User** button at the bottom of the *Modify User Profile Screen* (circled on Figure 8). An updated View Modify User Profile Screen will be displayed (Figure 9). The **Cancel** button returns you to the *Accounts Management Main Scr*een (Figure 2).

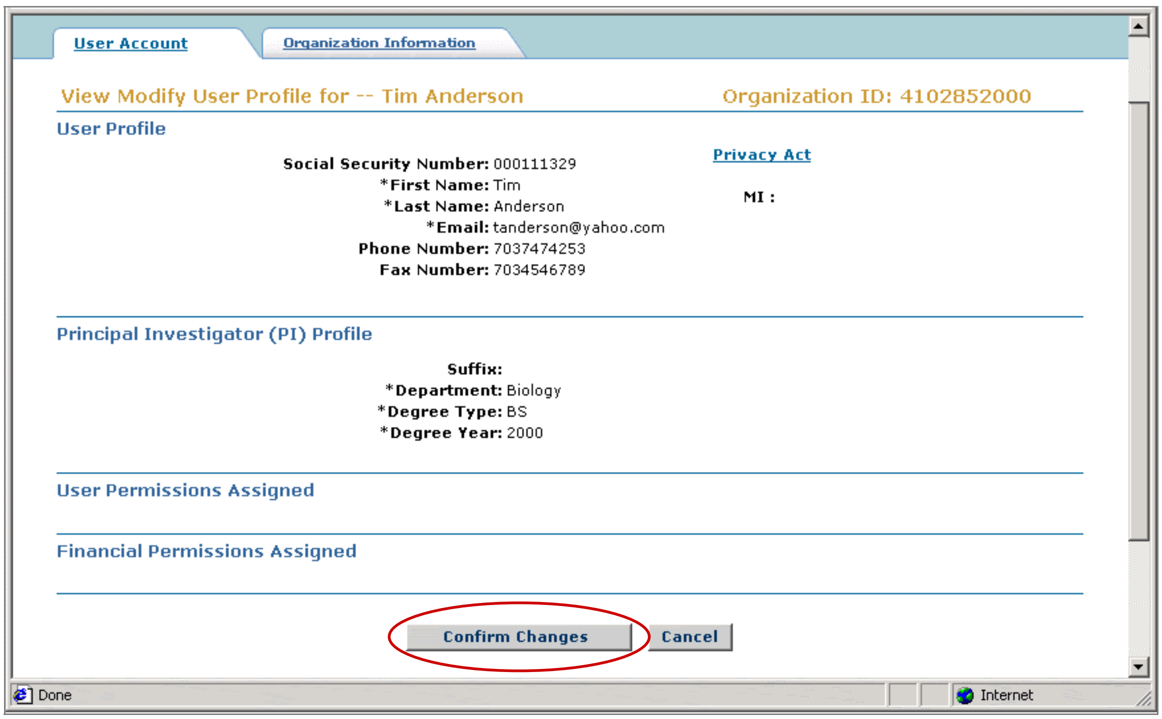

Figure 9. Updated View Modify User Profile Screen

4. Click the **Confirm Changes** button (circled in Figure 9) and the *Modify User Data Confirmation Screen* (Figure 10) will display. Clicking the **Cancel** button on the View Modify User Data screen redisplays the *Modify User Profile Screen* (Figure 8) and allows the FastLane user to make corrections to the user's information.

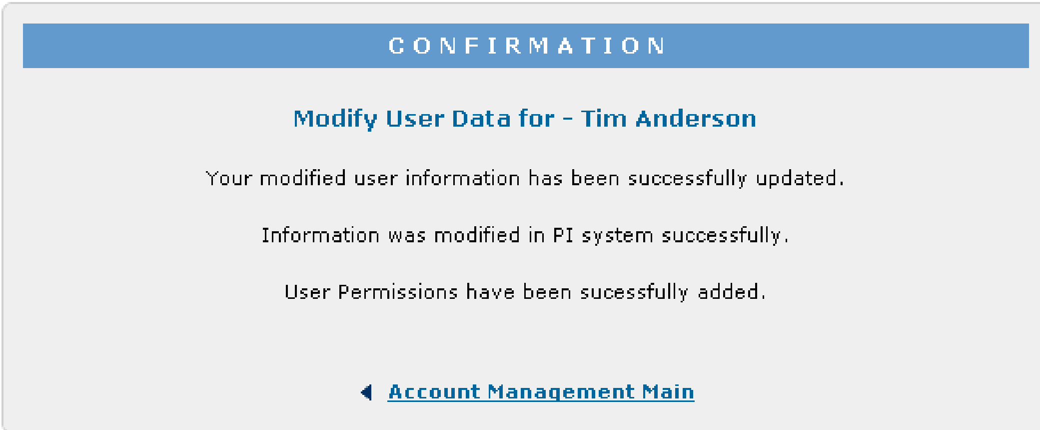

Figure 10. Modify User Data Confirmation Screen

5. When the *Modify User Data Confirmation Screen* (Figure 10) displays, the user changes have been successfully updated in the FastLane system. Clicking the **Account Management Main** link displays the *Accounts Management Main Screen* (Figure 2).

Delete a FastLane User

To be able to view and access the Delete button, the FastLane user must have the permission to "Add, Modify and Delete FastLane User". The following describes the process for deleting a FastLane user:

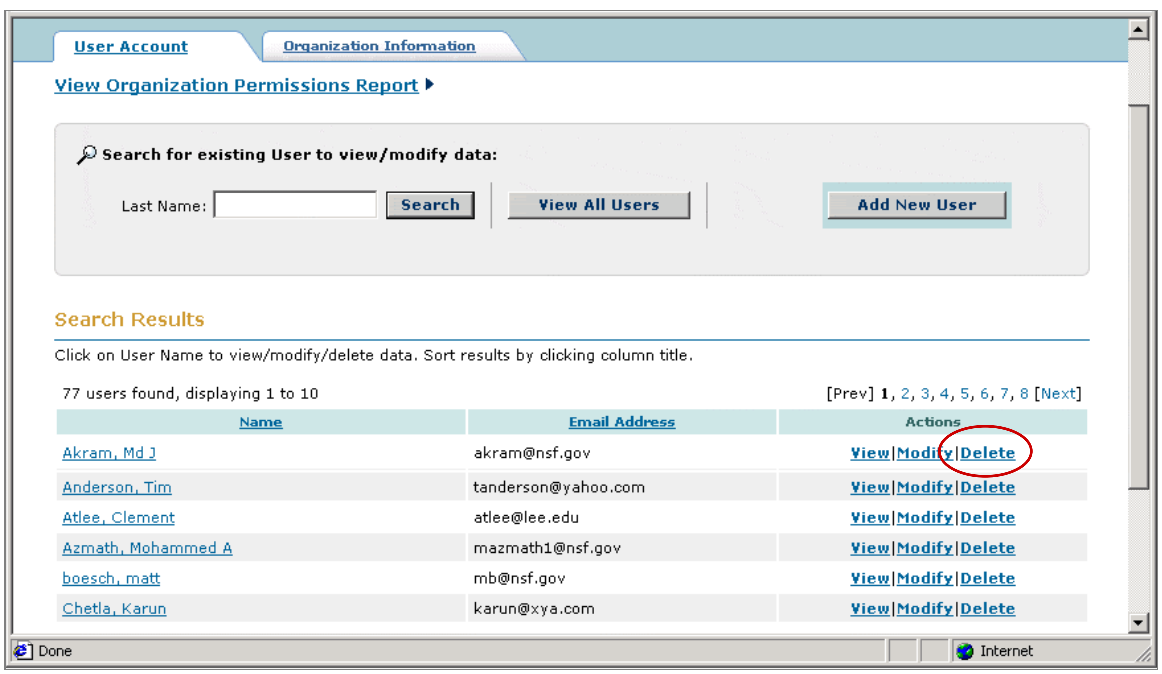

Figure 11. Search User Results Screen

1. Delete the user by two methods:

   Before modifications or deletions are made, the user can view the FastLane user by clicking on the user's name link in the **Name** column or the **View** link in the **Actions** column. The *View User Profile Screen* (Figure 7) displays when either of these links is selected. The user clicks **Delete User** and the *DeleteUser Data Screen* (Figure 12) appears.

   Or

   The user can immediately delete a user profile by clicking **Delete** link in the **Actions** column on the *Search User Results Screen* (circled in Figure 11).

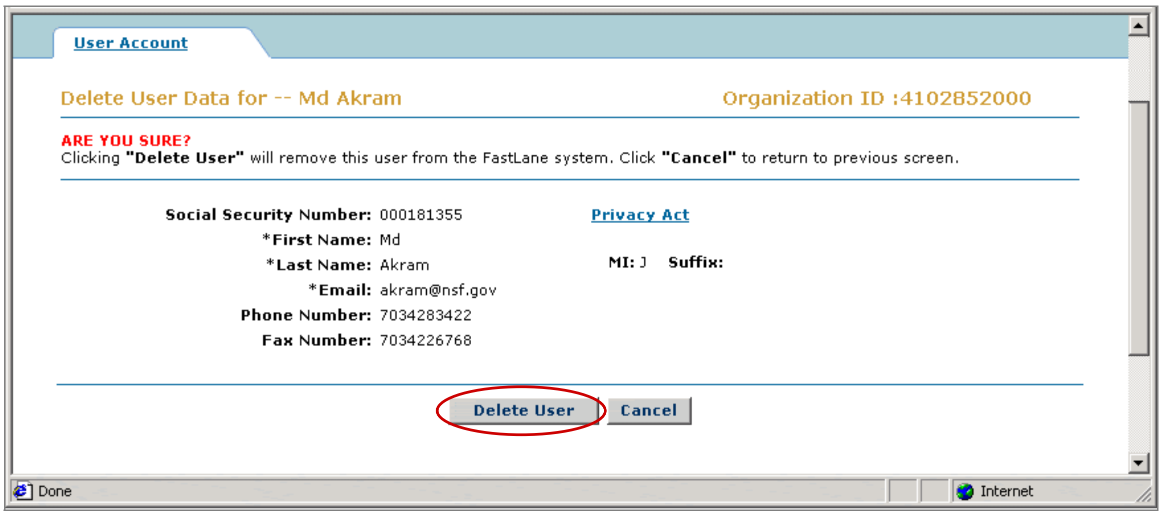

Figure 12. Delete User Data Screen

2. If the information displayed on the *Delete User Data Sc*reen (Figure 12) is correct, click **Delete User**. The *Delete User Message Screen* (Figure 13) will display. Clicking the **Cancel** button on the *Delete User Data Screen* (Figure 12) takes you back to the *Search User Results Screen* (Figure 11).

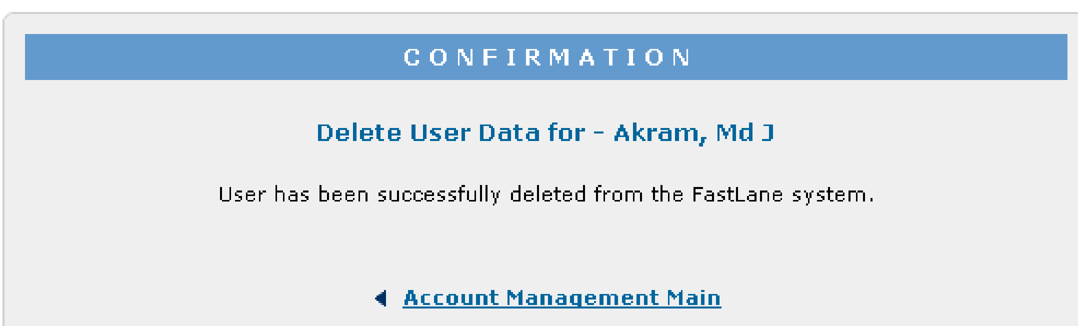

Figure 13. Delete User Message Screen

3. When the *Delete User Data Confirmation Screen* (Figure 13) appears, the user has been successfully deleted from the FastLane system. Clicking the **Account Management Main** link displays the *Accounts Management Main Screen* (Figure 2).

Organizational Information

The FastLane *Organizational Information Tab Screen* (Figure 14) displays the current profile for the organization, and the means to revise the existing organization information. This feature is available to the users who have the “Revise/Review Organization Information” permission. The Organization Name cannot be changed on this page. Use the *Request Change of Organization Name Screen* (Figure 19) to change the organizational name.

The Fast Lane *Organizational Information Tab Screen* (Figure 14) will display a different profile for the user, depending if the user is a member of an institution that has award applications and requirements. Figure 14 displays a current profile for an institution without an award. Figure 15 displays a current profile for an institution with an award.

NOTE: *If your organization is not an award institution, you will not see a screen found in Figure 15. You will only see a screen found in Figure 14.*

The following actions are needed to modify organization information:

1. Modify organization information by entering the appropriate data into the corresponding fields. All required fields are labeled with an asterisk (*).

2. Click **Submit Changes** (circled in Figure 14 for non-award institutions; circled in Figure 15 for award institutions) when all appropriate data has been entered in the fields.

3. Click **Cancel** to go back to the *Accounts Management Main Screen* (Figure 2).

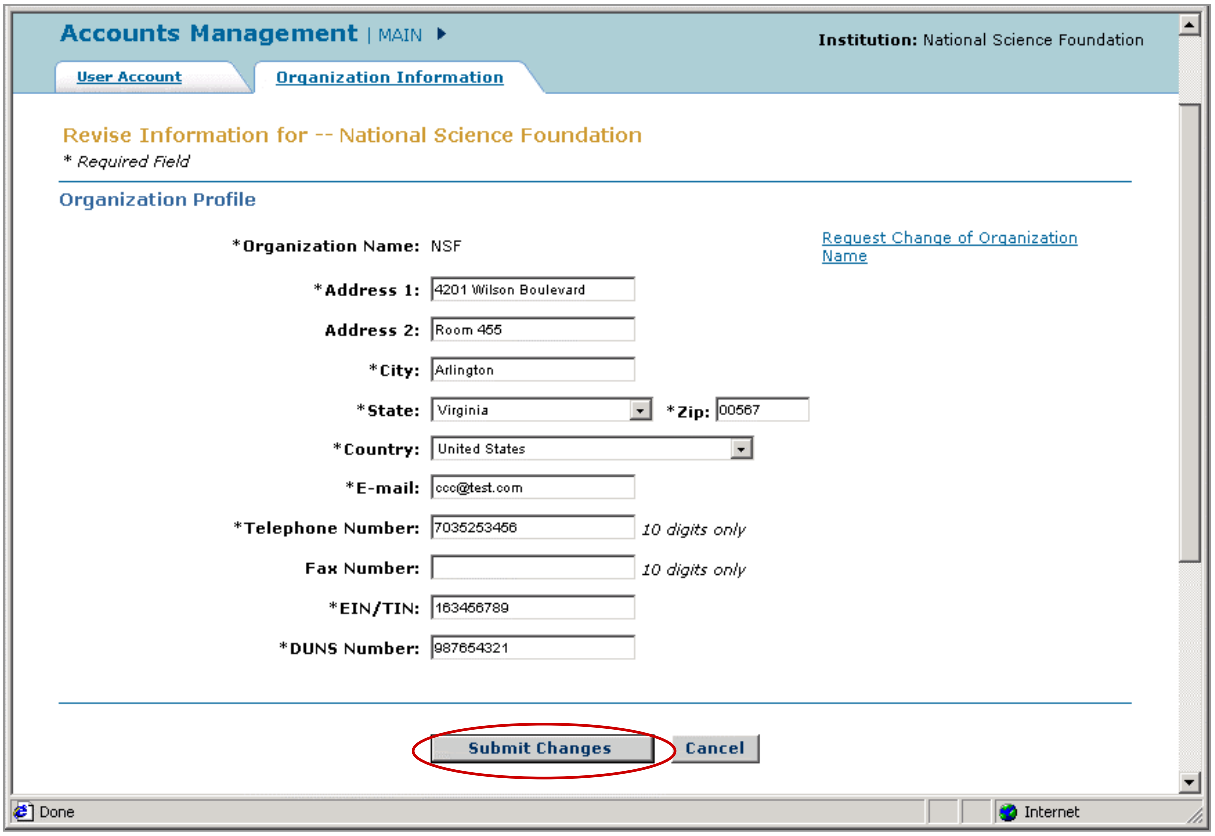

Figure 14. Non-award Institution Organizational Information Tab Screen

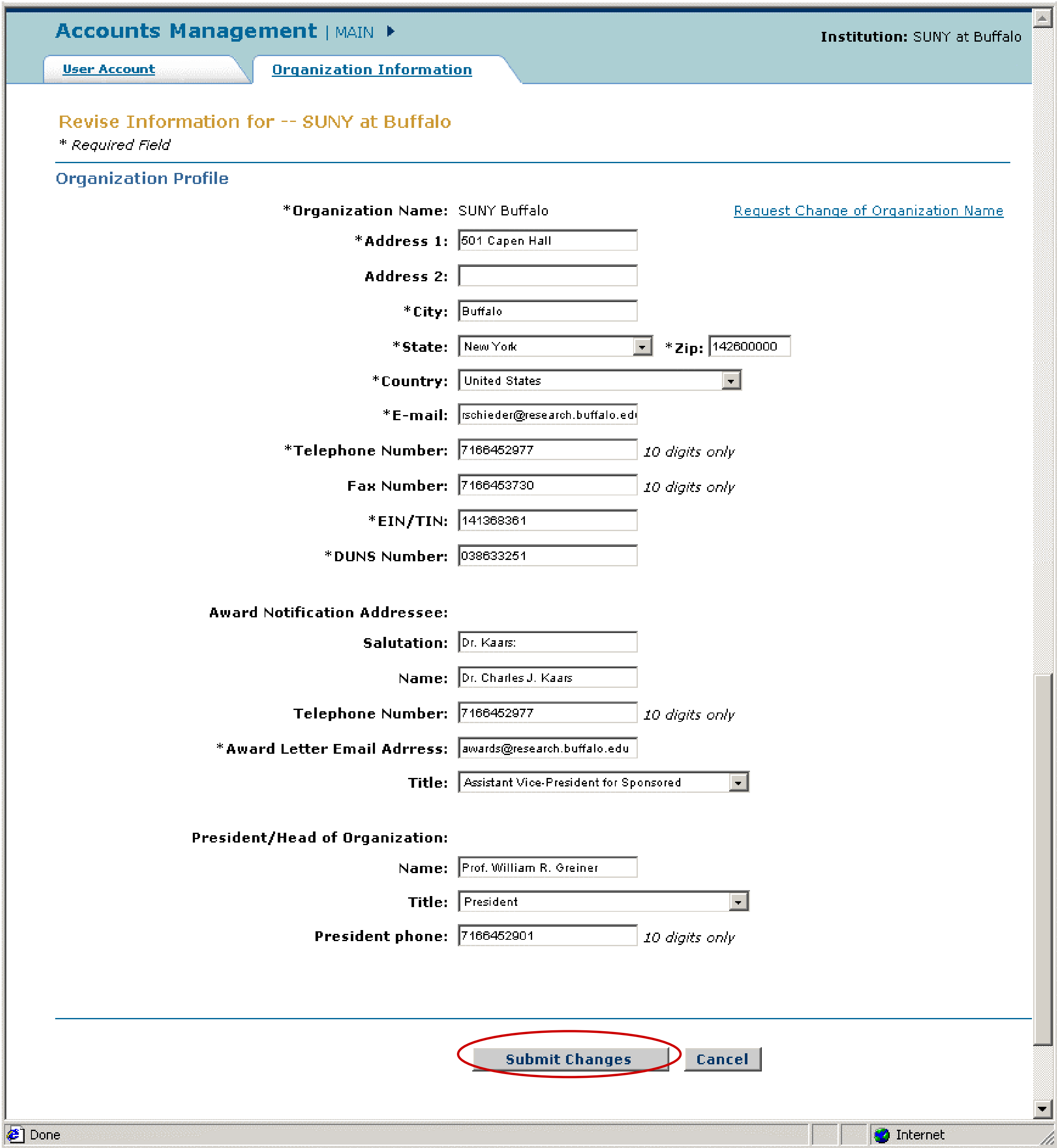

Figure 15. Award Institution Organizational Information Tab Screen

4. A *Revise Information Confirmation Screen* (Figure 16 for non-award institutions and Figure 17 for award institutions) will be displayed with all of the new information entered on the previous screen. Click **Confirm Changes** (circled in Figure 16 and Figure 17) to submit information. A link is provided from this page to the *Request Change of Organization Name Screen* (Figure 19).

5. Click **Cancel** to go back to the *Organizational Information Tab Screen* (Figure 14 for non-award institutions or Figure 15 for award institutions)

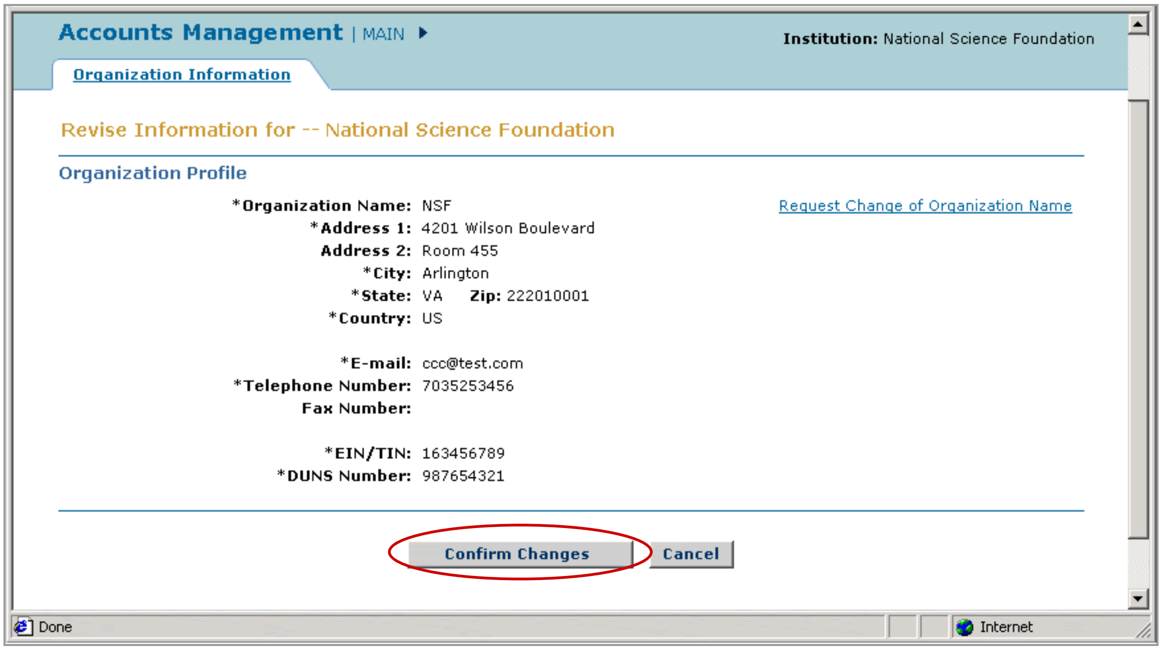

Figure 16. Revise Non-award Information Confirmation Screen

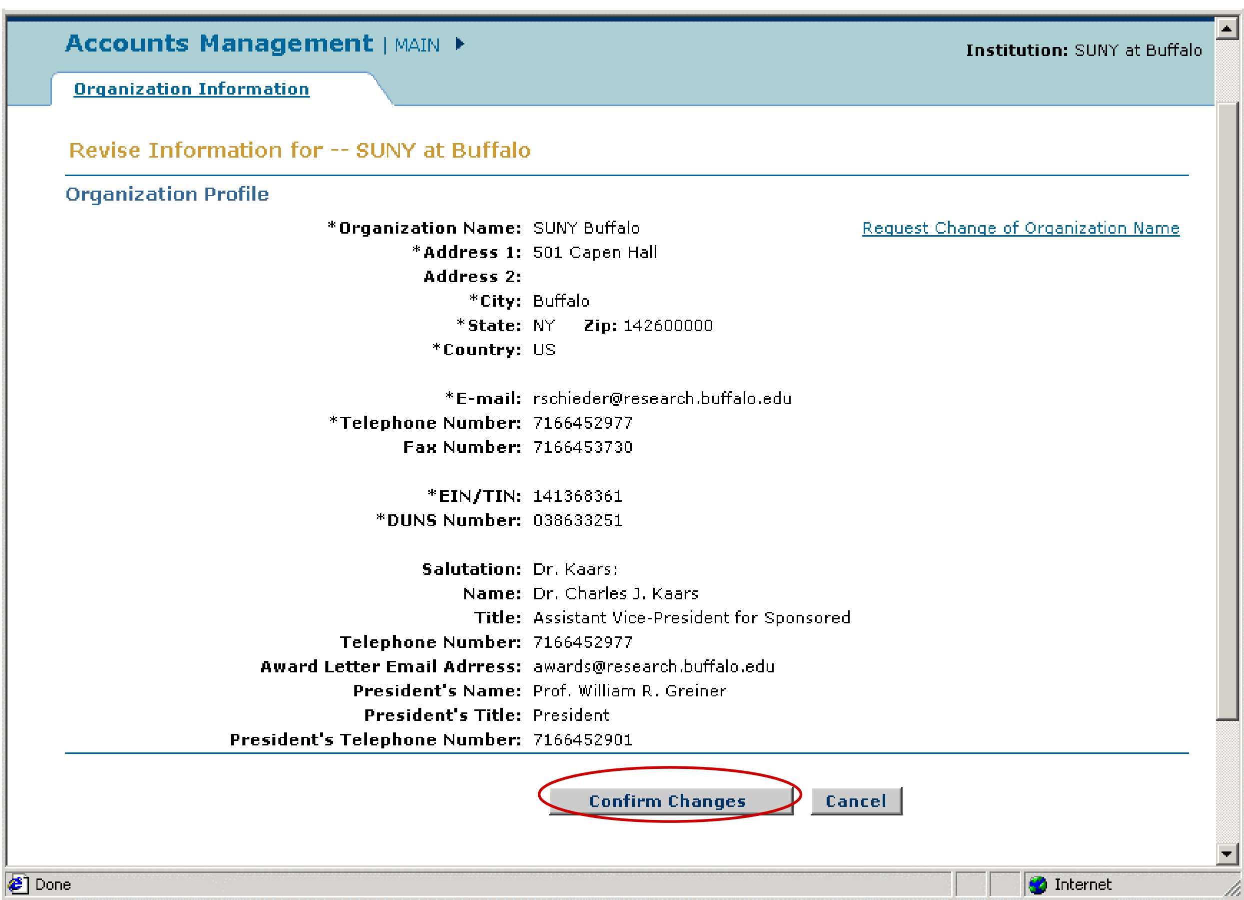

Figure 17. Revise Award Information Confirmation Screen

6. An *Updated Organization Information Confirmation Screen* (Figure 16) will load with a confirmation of changes message. This screen acknowledges the update of the organization information and appears for both award and non-award institution changes.

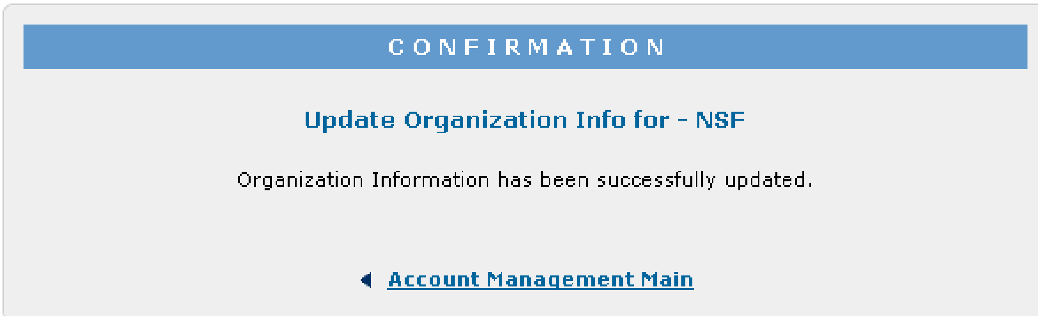

Figure 18. Updated Organization Information Confirmation Screen

Request Change of Organization Name

The Request Changes of Organization Name link provides the means to request a new name. The required fields are designated with an asterisk. The Organization ID and Active Awards information is displayed for your organization.

The following actions are needed to modify organization information:

1. Modify organization information by entering the appropriate data into corresponding fields. All required fields are labeled with an asterisk (*).

2. Click **Submit Request** (circled in Figure 19) and then **Confirm** on the next page when all appropriate data has been entered in the fields to complete the change process.

3. Click **Cancel** to return to the FastLane *Organizational Information Tab Screen* (Figure 14 or 15).

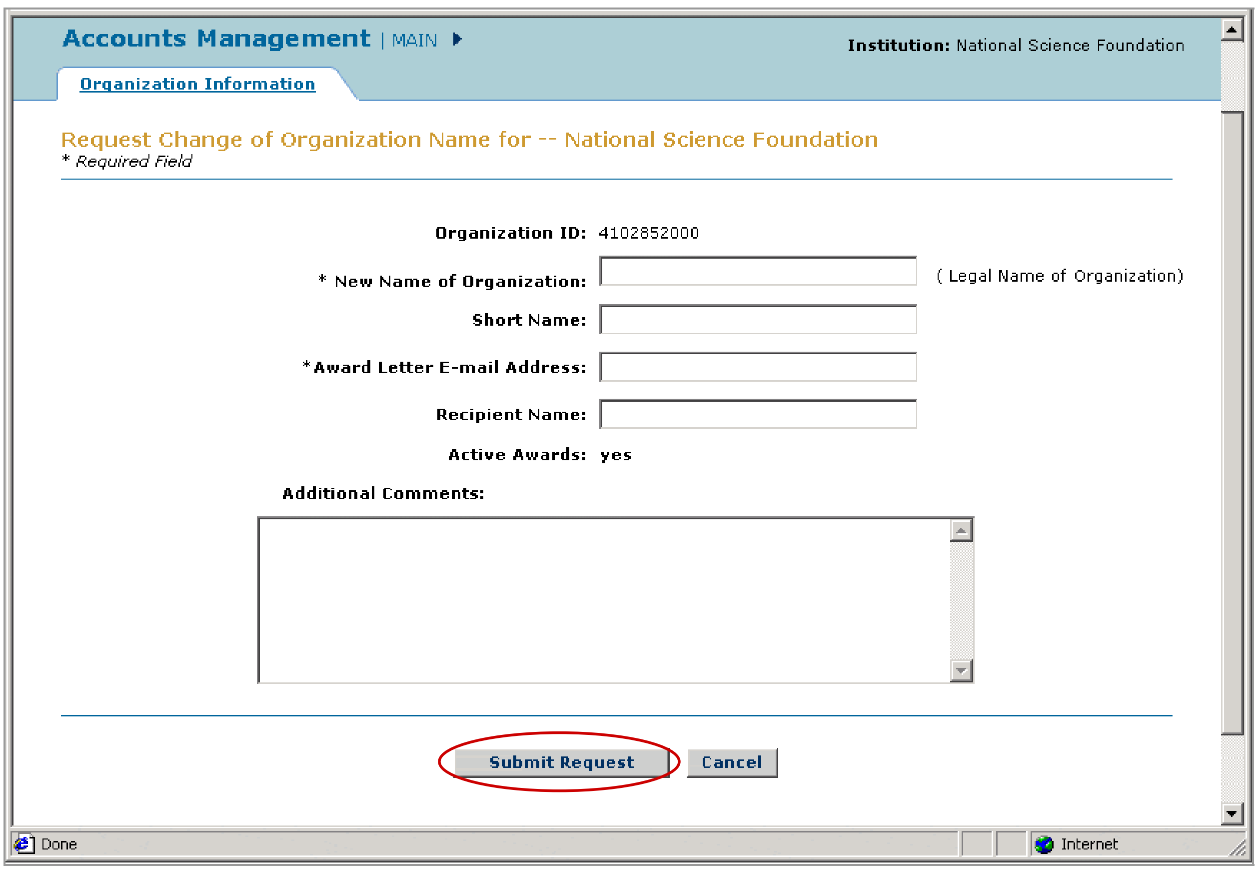

Figure 19. Request Change of Organization Name