
A. User Access FAQ

1) How do I see who has roles in my district?

Open the Address Book from the button on the blue Main Menu.

2) Who can add or modify users?

One or more district individuals can be assigned the User Access Administrator role to manage who can view and work in unapproved plans and grant applications for their district only. This person can add users, add and delete roles for a user, initiate a new password or modify user information for users in their district.

The SEA user access administrator can add and manage users for any district as well as user for CSDE.

Any user can modify their own profile information- name, email address, phone numbers- and reset their passwords.

3) Can a user have multiple roles?

Yes, a role is a permission set, not a job title. In some districts, a user may work with more than one funding application and would need roles for each one.

4) Can multiple users have the same role?

Yes. For example, several people could have the same role that would give them the ability to work in an application.

5) Can a user be deleted?

No. Because activities are tracked by user, all users stay in the system in order to maintain activity records. However, a user can be inactivated by removing all roles assigned to the user.

6) Why didn't a new user get an email to set a password?

If the email address for a new user is correct, it could be that the email was routed to a junk folder. If the email address for a new user is incorrect, the password email was sent to that incorrect address. In that case, the user access administrator corrects the email address and clicks the link to Reset Password to send a new password email.

7) What are the permissions of the different roles?

Permissions are determined by 1) the district assigned and 2) the role assigned. SEA roles have access to all districts. District roles have permissions only for the district to which they have a role.

Role	User Access Administration	Consolidated Funding Application-Title IA & Title IIA	Consolidated Funding Application-Title III	State Bilingual Application
User Access Administrator	Edit	View	View	View
LEA Data View	None	View	View	View
LEA Grant Contact - Consolidated Title I-A and Title II-A	None	Edit and Mark Completed	View	View
LEA Grant Contact for Consolidated - Title III	None	View	Edit and Mark Completed	View
LEA Grant Contact for State Bilingual Grant	None	View	View	Edit and Mark Completed
LEA Superintendent	None	Edit and Give Superintendent Approval	Edit and Give Superintendent Approval	Edit and Give Superintendent Approval

8) Can a user work in multiple districts?

Yes. District User Administrators can assign a role for their district to any user in eGMS, even if that user is in another district. This is most often used in consortia. Search for the user and then assign the role.

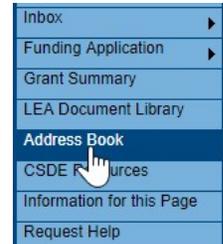
9) Must a person have a role to view the applications?

A person must have a user ID and appropriate role to view unapproved applications. Approved grant applications are visible to anyone, including the public.

B. Reviewing User Roles

It is best practice to review the roles in your district annually to determine if changes need to be made. A quick way to see who has roles in your district is to access the Address Book.

Use the toggle link View All District Contacts to see the roles for each user.



The screenshot shows the 'View All District Contacts' interface. A yellow arrow points from the 'View All District Contacts' link to the 'Return To Address Book' link in the 'LEA Contacts' section. The interface displays a list of roles and their corresponding contacts. A detailed view of a user's roles is shown on the right.

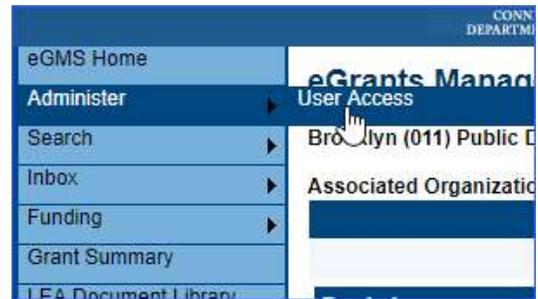
Role	Contact
LEA Data View	Clarke, Nadira
	Morales, Angelica
	Sousa-Martins, Ana
LEA Fiscal Representative	Broderick, Andrea
	Clarke, Nadira
	Morales, Angelica
	Siegel, Marlene
LEA Grant Contact for Alliance and Priority School District Grants	Clarke, Nadira
	Morales, Angelica
LEA Grant Contact for Consolidated - Title I-A and Title II-A	Clarke, Nadira
	Morales, Angelica
	Siegel, Marlene
LEA Grant Contact for Consolidated - Title III EL and Immigrant Subgrant	Clarke, Nadira
	Morales, Angelica
	Sousa-Martins, Ana
LEA Grant Contact for ESSA SIG	Clarke, Nadira
	Morales, Angelica
LEA Grant Contact for IDEA	Lenzen, Veronica
	Morales, Angelica
LEA Grant Contact for McKinney-Vento Homeless Assistance	Clarke, Nadira
	Morales, Angelica
LEA Grant Contact for State Bilingual Grant	Clarke, Nadira
	Morales, Angelica
	Sousa-Martins, Ana

Name	Role
Broderick, Andrea	LEA Fiscal Representative
	LEA Superintendent
	User Access Administrator
Clarke, Nadira	LEA Data View
	LEA Fiscal Representative
	LEA Grant Contact for Alliance and Priority School District Grants
	LEA Grant Contact for Consolidated - Title I-A and Title II-A
	LEA Grant Contact for Consolidated - Title III EL and Immigrant Subgrant
	LEA Grant Contact for ESSA SIG
	LEA Grant Contact for McKinney-Vento Homeless Assistance
	LEA Grant Contact for State Bilingual Grant
	LEA Grant Contact for Title IV Part A
	LEA Plan Data Entry
	LEA Superintendent
	User Access Administrator
Lenzen, Veronica	LEA Grant Contact for IDEA
Morales, Angelica	LEA Data View
	LEA Fiscal Representative

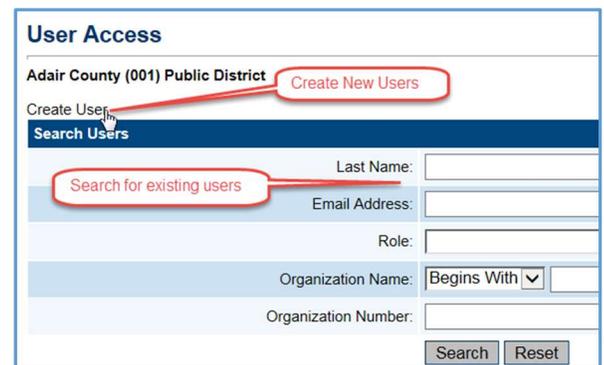
C. Creating New Users

1. Note: Only create new users for people who have never had access to the system. If a person is a current user and moves to another district, change the user's email address to the new one and delete the roles in your district.

- From Administer on the main menu and select *User Access*. (This menu item only appears for persons with User Access Role.)

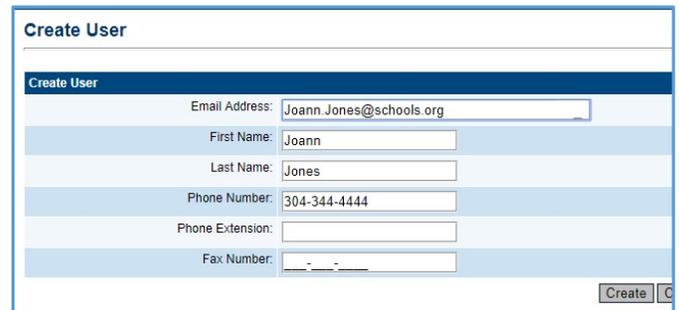


- The User Access page provides the ability to search for existing users using several filters – name, role, organizations.

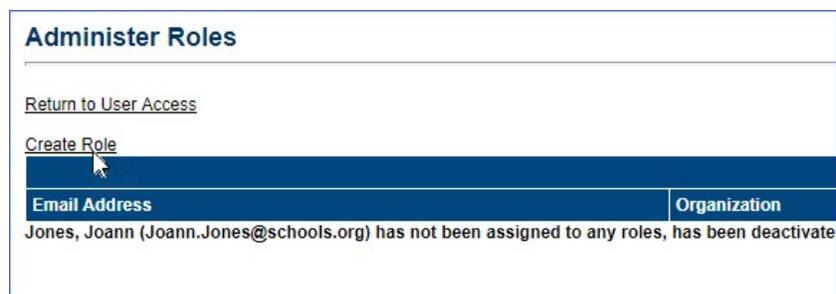


- Click on the “Create User” link to open a screen to create a new user.

- Enter the email address, first name and last name. It is advisable to add a phone number if it is known. However, the user can add it later from the user profile. Click on “Create.” The system sends an email to the address permitting the new user to set a password.



- The system next displays the Administer Roles page. Click on Create Role.



LEA user access administrators can only create roles for their own district. SEA administrators are able to select a district from the drop down menu. Select a role or roles for the user using the drop down box and click on the Create button. Note: for Grant application users leave the school selection at "ALL". Schools are selected only for School Plan users.

The screenshot displays a web-based interface for creating user roles. At the top, there are three fields: 'Organization:' with a dropdown menu showing 'Preston School District (114-000)', 'LEA:' with a dropdown menu showing 'Preston School District (114-000)', and 'School:' with a dropdown menu showing 'ALL'. Below these fields is a 'Role:' section. It contains the text '0 Option(s) selected.' and a link 'Select All / Deselect All'. A scrollable list of roles is shown, each with an unchecked checkbox. The roles are: LEA Fiscal Representative, LEA Grant Contact for Alliance and Priority School District Grants, LEA Grant Contact for Consolidated - Title I-A and Title II-A, LEA Grant Contact for Consolidated - Title III EL and Immigrant Subgrant, LEA Grant Contact for ESSA SIG, LEA Grant Contact for IDEA, LEA Grant Contact for McKinney-Vento Homeless Assistance, LEA Grant Contact for State Bilingual Grant, LEA Grant Contact for Title IV Part A, LEA Plan Data Entry, and LEA Superintendent. At the bottom right of the form are two buttons: 'Create' and 'Cancel'.

E. Modifying and Removing Users

1. Changing roles

- a. To change, delete or add a new role for an existing user, use the search screen to locate the user.

- b. Click on the *Administer Roles* icon.

Email Address	First Name	Last Name	Reset Password	Administer Roles	Delete All Roles	User History
Joann.Jones@schools.org	Joann	Jones	Reset Password			View

- c. From the Administer Role screen, you can add a new role by click on “Create Role” or delete an existing role by clicking on the trashcan icon beside the unwanted role.

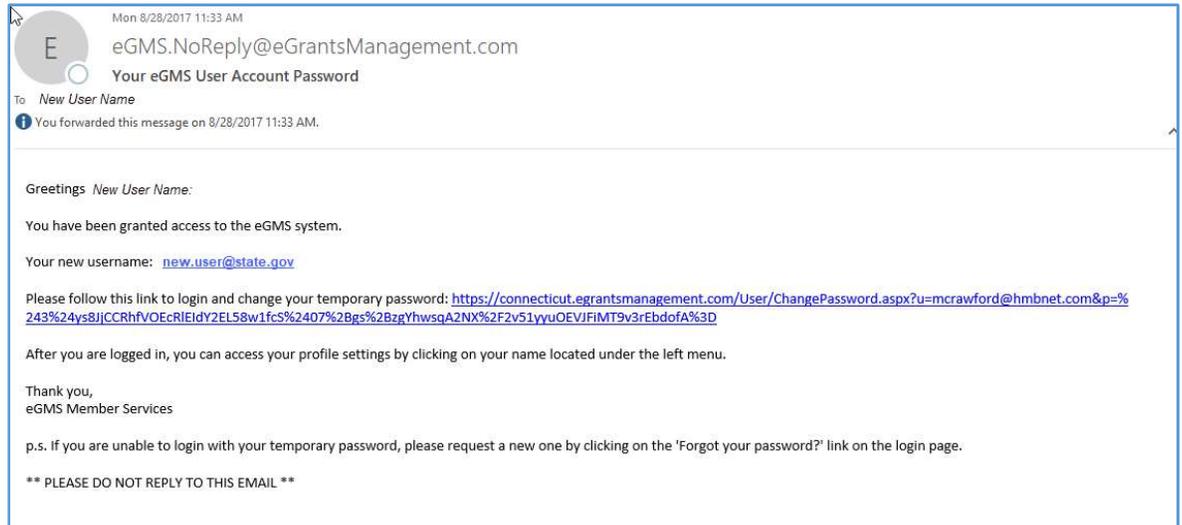
2. Deleting a User

Users cannot be deleted from the system in order to preserve the integrity of audit records. However, by deleting all roles, they no longer have access to any funding applications. Click on the “Delete All Roles” trashcan icon to disable a user.

3. Updating a profile

Users can update their own profiles - change their name, email address or phone number - once they are logged into the system. However a user access administrator can also modify the profile by searching for the user and clicking on the user email address from the search results.

- a. Managing Passwords New users are sent an email from the “eGMS.NoReply@eGrantsManagement.com” as soon as they are added to the system. This email allows them to set their own password.



- b. If users forget their password or want to reset their password, they can use the “Forgot your password?” link on the eGMS sign-in screen or, if they are logged in and wish to change their password, they can find the link by clicking on their name to bring up the user profile.
- c. User Access administrators can also generate a new password email by searching for the user and clicking on “Reset Password.” This is sometimes necessary if the first email was lost or the email address was incorrect.

4. Assigning users to multiple districts

- a. The SEA User Access administrators can assign roles in multiple districts for a user. Use the User Access Search page to find the user or create the new user. From the *Create Roles* select a district for the role and the role. (Leave School at *ALL* for users with funding application roles. The school is used only for users involved with the Planning Tool.)
- b. Repeat the process for other district roles.

- c. An LEA user access administrator can grant a role in their district to any user in the eGMS system.
- d. Search for the user. Click on the “Administer Roles” icon.
- e. Assign the user a role within your district. Note: User roles in other districts are not visible to District user access administrator and they can only modify roles for their district.