EGRANTS USER ROLE REQUEST WALKTHROUGH

A guide to requesting access to roles in Egrants

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INFORMATION GUIDE

This walkthrough provides a general overview of how to gain access to an Agency's grants in the PCCD Egrants system.

You may follow this walkthrough page by page or click on a step listed on the right of this slide for information on a specific step of the process.

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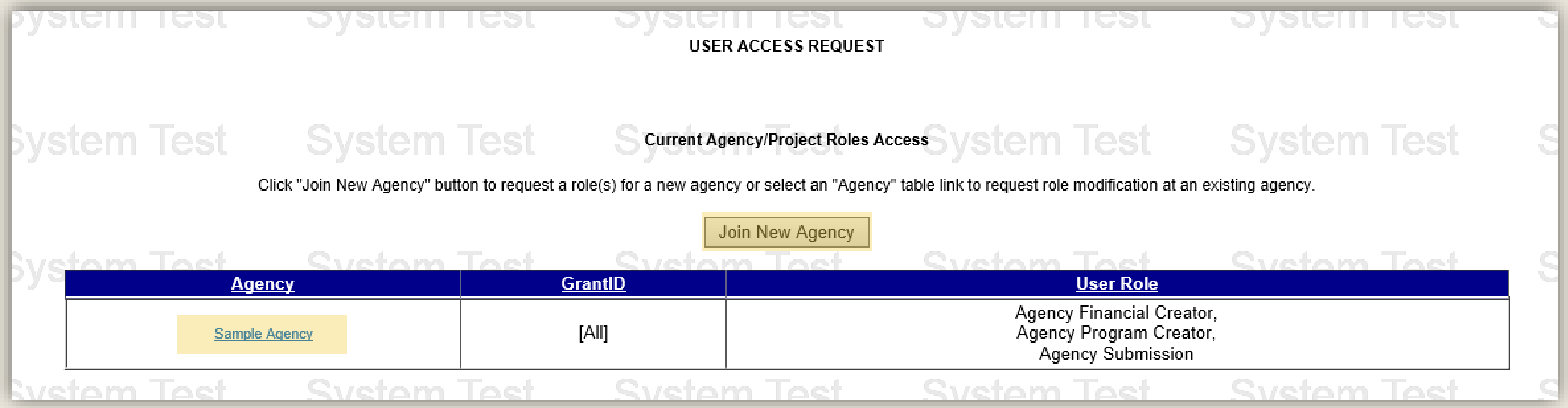
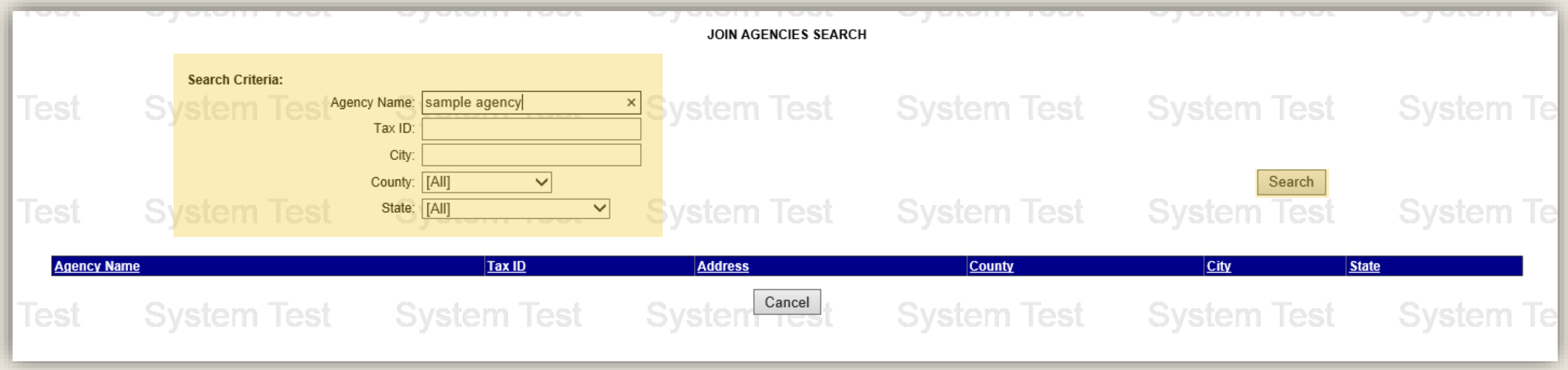
1. REQUEST ACCESS TO AGENCY ROLES

If you see the **Agency** you wish to join in the table located on the User Access Request page, click on the linked **Agency name.** If the Agency you need access to is not listed in the table, click the **Join New Agency button.**

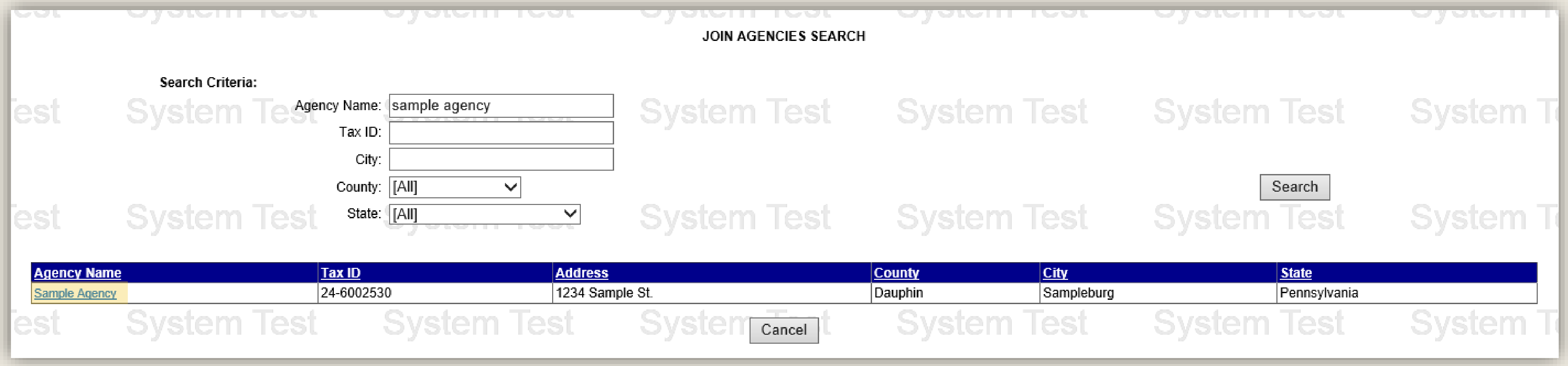
Most new users will need to click the Join New Agency button.



On the **Join Agencies Search** page, you'll enter information in one or more of the **Search Criteria** fields then click the **Search** button. It is best to enter as little information in the search criteria fields as possible.

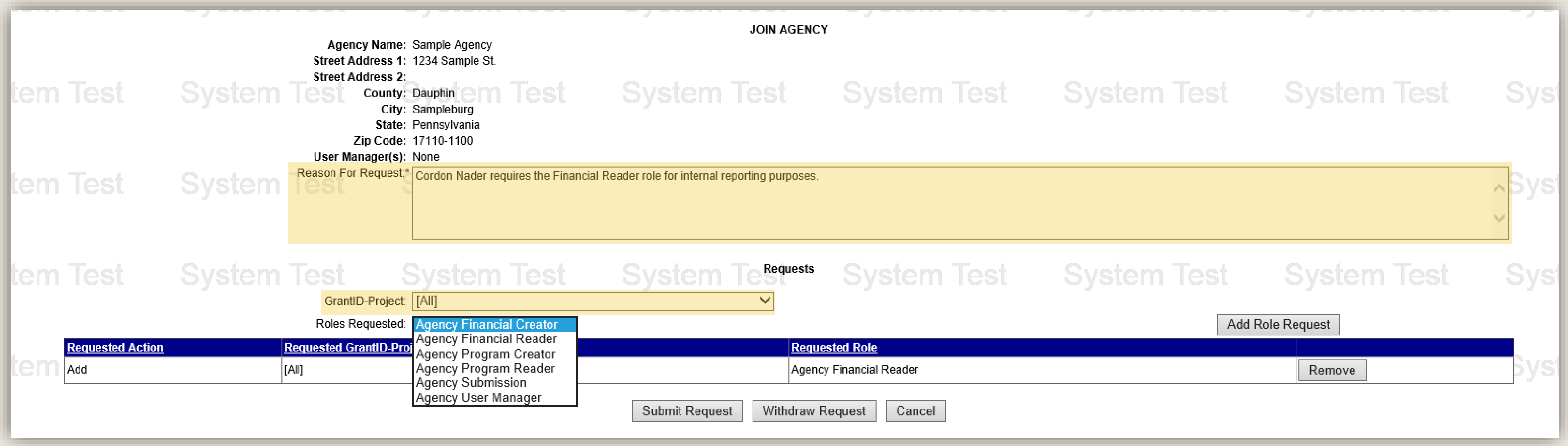


Search results will appear in a table below the Search Criteria section. Click on the **Agency Name** link that matches your Agency.



If your agency does not appear in the search results or has never applied for funding from PCCD through the PCCD Egrants system, complete and submit the [Egrants Agency Registration Request Form](). You will not be able to request Agency Roles until the Agency is registered with Egrants.

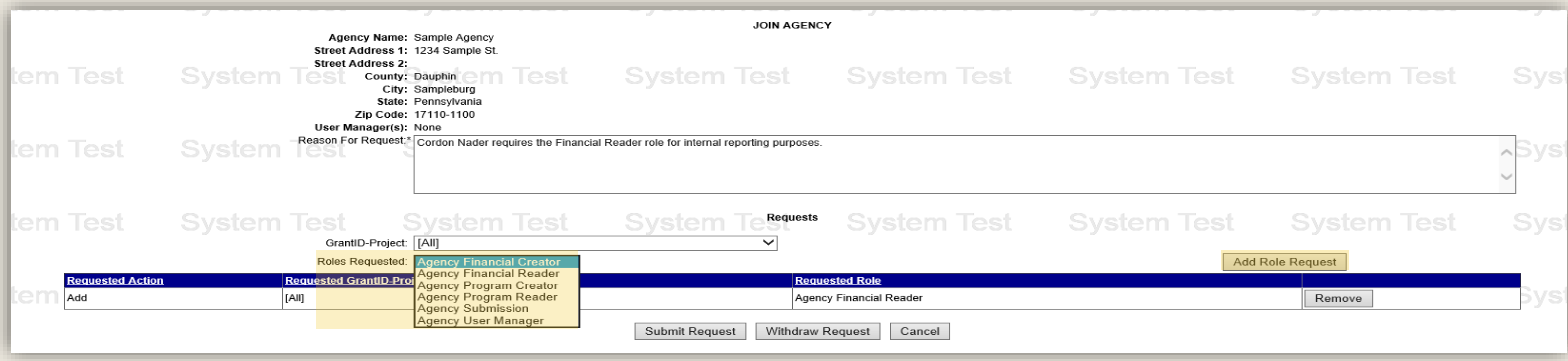
On the Join Agency page, complete the **Reason for Request** and choose which **GrantID-Project** you are requesting access to. If you would like access to all the grants under the Agency's name, choose the 'All' option.



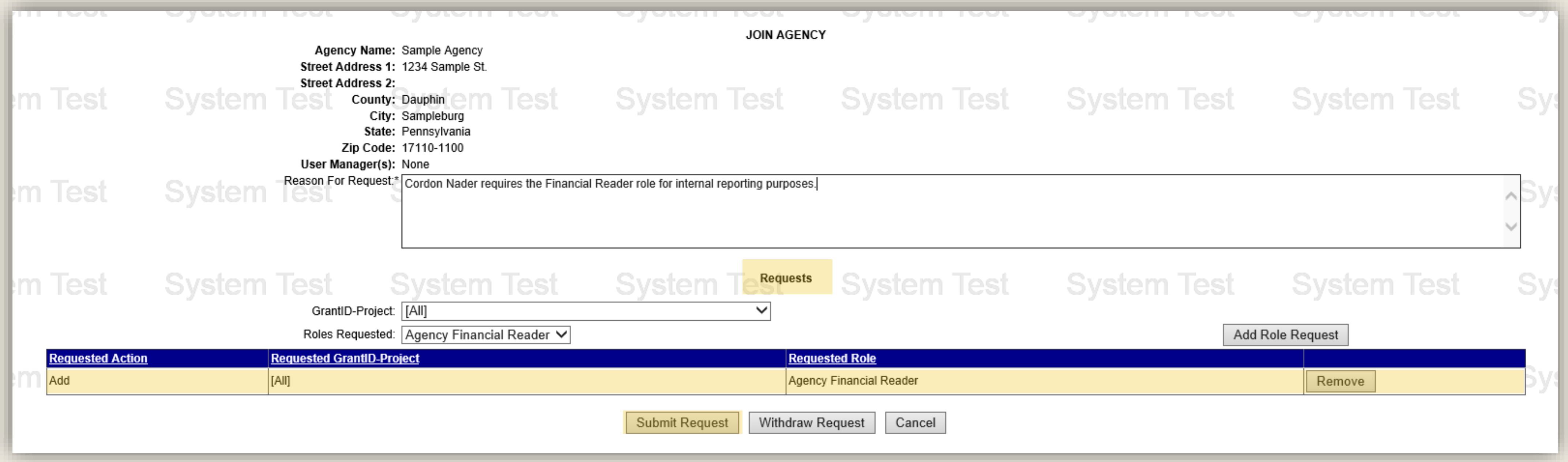
Information on **Roles** can be found on the next page.

Access to the Agency's grants are separated into six unique roles. To add a role, select a role from the **Roles Requested** menu and click the **Add Role Request** button. Users may request up to six roles. Please note:

- **Financial Creator** can **view and create** fiscal information (manage budget section information, fiscal reports, etc.)
- **Financial Reader** can **view** fiscal information
- **Program Creator** can **view and create** program information (manage program section information, program reports, etc.)
- **Program Reader** can **view** program information
- **Submission** can **submit grant forms** like applications, modification, and continuations
- **User Manager** can **manage user roles** for the Agency's grants (will still need other roles if performing other duties)



Once all desired roles have been added to the **Requests** table, click the **Submit Request** button.



3. CONFIRM REQUEST SUBMISSION

You can confirm that your request was submitted by looking at the **Request History** table, which should show the **User Roles requested** as well as an **In-Process** request **Status.**

USER ACCESS REQUEST

Current Agency/Project Roles Access

Click "Join New Agency" button to request a role(s) for a new agency or select an "Agency" table link to request role modification at an existing agency.

Join New Agency

Agency	GrantID	User Role
Sample Agency	[All]	Agency Financial Creator, Agency Program Creator, Agency Submission

Filter Criteria :

Request History Status: [All]

Request History

Agency	GrantID	User Role	Requested Date/Time	User Manager	Status
Sample Agency	[All]	Agency Financial Reader	8/20/2019 4:25:39 PM	None	In-Process

After submitting your request, your agency's User Manager will receive an alert to review and approved your request. Please speak with the User Manager of your agency if you do not receive access to the grant.

Additional Information

- Use the links in the table of contents to the right to revisit any step of this walkthrough.
- If you have any questions throughout this process, email ra-eGrantsSupport@pa.gov
- For additional grant guides and walkthroughs, please visit the PCCD Grant Guide webpage.

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