



Grants & Incentive Management System
Agency of Commerce & Community Development



New User Activating Guide for Authorizing Officials

(M/AO, SAO and AO Roles, collectively AO)

V4.0, 06/2016

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I. Adding Users to an Organization

Roles an AO can add/approve: *Viewer, Writer and Administrator*

1. The AO is able to add approved users to the organization, as well as approve users if they have NOT created a new user account yet.

NOTE: If the new user has created a new account on their own, the AO will need to contact program staff to have them approve the new user account.

2. The AO logs in and clicks on the 'My Organization(s)' link.

VERMONT Grants & Incentive Management System
Agency of Commerce & Community Development

My Home | My Applications/Grants | My Monitoring/Reporting | My Requisitions/Claims/Invoices | **My Organization(s)** | My Profile | Logout

2. [SHOW HELP](#)

Welcome TrishaAO
Authorizing Official
[Change My Picture](#)

Instructions:
Select the **SHOW HELP** button above for detailed instructions on the following.
> Applying for an Opportunity
> Using System Messages
> Understanding your Tasks
> Managing your awarded grant

Hello TrishaAO, please choose an option below.

View Available Proposals

You have 6 My Opportunities available.
Select the **View Opportunities** button below to see what is available to your organization.

[VIEW OPPORTUNITIES](#)

I. Adding Users to an Organization, cont.

- 3. Click on the 'Organization Members' link.
- 4. Click on 'Add Members' link.

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My Home | My Applications/Grants | My Monitoring/Reporting | My Requisitions/Claims/Invoices

My Organization(s) | My Profile | Logout

SAVE SHOW HELP

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Organization - Guilford Testing Organization

Please complete all the required fields below. Required fields are marked with a *.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Information

Name: Guilford Testing Organization *

Short Name: GuilfordTestingOrg *

Address: 123 Any St. *

City: _____ State: Vermont * Zipcode: 05500 *

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Organization - Guilford Testing Organization

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:

- 1. To add a member to your organization, select the **Add Members** link below.
- 2. If a member has already added his/her information in the system, you can search for the member.
- 3. If you need to add a member's information into the system, select **New Member**.
- For more detailed instructions, select the **Show Help** button above.

Current Members | [Add Members](#)

Sort By: -----SELECT----- Results Per Page 20 GO

Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/> Administrator Test	Administrator	9/25/2012	1	System, Grant 10/8/2012	
<input checked="" type="checkbox"/> AFO_Test	Administrator/Financial Officer	9/25/2012		System, Grant 10/8/2012	
<input checked="" type="checkbox"/> AO_Test	Authorizing Official	9/25/2012	1	System, Grant	

I. Adding Users to an Organization, cont.

If the user already has an approved user account:

5. Enter the partial name (either first or last) and click 'Search'.

6. The list of users matching the search criteria will then display.

7. Select the person you want to add using the checkbox, select the appropriate role from the Role drop down, and enter the Active Date.

Note: See page 9 for DHCD and page 10 for VEPC role descriptions.

8. Click 'Save'.

The screenshot shows the Vermont Grants & Incentive Management System interface. At the top, there is a navigation bar with links for 'My Home', 'My Applications/Grants', 'My Monitoring/Reporting', and 'My Requisitions/Claims/Invoices'. Below this, there are links for 'My Organization(s)', 'My Profile', and 'Logout'. A 'SAVE' button is circled in yellow, with the number '8.' next to it. Below the navigation bar, there is a 'Back' button and a heading for 'Organization - Guilford Testing Organization'. A sub-heading reads 'Follow the instructions listed below to add/remove/modify organization members.' Below this, there are links for 'Organization Information', 'Organization Members', 'Organization Documents', and 'Organization Details'. The 'Organization Members' section is active, showing a list of administrators. A search box labeled 'Person Search' contains the name 'Trisha' and is circled in yellow, with the number '5.' next to it. Below the search box, there are 'SEARCH' and 'NEW MEMBER' buttons. The main table lists organization members with columns for 'Person', 'Role', 'Active Dates', 'Active Documents', 'Assigned By', and 'Modified By'. The second row is selected, and a dropdown menu for the 'Role' column is open, showing options like 'Administrator', 'Authorizing Official', and 'Senior Authorized Official'. The 'Administrator' role is selected and circled in yellow, with the number '7.' next to it. The 'Active Dates' column for this row shows '5/6/2015' and is also circled in yellow. The 'Person' column for this row shows a checkbox that is checked and circled in yellow.

Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input type="checkbox"/> Standen, TishaTestAO	-- Select --	5/6/2015	-		
<input checked="" type="checkbox"/> Standen, TrishaAdmin	Administrator	5/6/2015			
<input type="checkbox"/> Standen, TrishaAO	-- Select --	5/6/2015	-		
<input type="checkbox"/> Standen, TrishaCDA	-- Select --	5/6/2015	-		
<input type="checkbox"/> Standen, TrishaCDS	-- Select --	5/6/2015	-		

I. Adding Users to an Organization, cont.

If the user does **NOT** have a user account:

9. Click 'New Member'.

10. Have the user fill out the form—name, email, username and password.

11. AO adds the Active Date and selects the correct organization role from the drop down.

Note: See page 9 for DHCD and page 10 for VEPC role descriptions

12. Click 'Save & Add to Organization'.

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Organization - VTP Test Company

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:

- 1. To add a member to your organization, select the **Add Members** link below.
- 2. If a member has already added his/her information in the system, you can search for the member.
- 3. If you need to add a member's information into the system, select **New Member**.
- For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Person Search

SEARCH

NEW MEMBER

9.

[Home](#)

[Grants/Incentives/ERS](#)

[Monitoring/Reporting](#)

[Requisitions/Claims/Invoices](#)

[Archive](#)

[Reports](#)

[Administration](#)

[Training Materials](#)

[Organization\(s\)](#)

[Profile](#)

[Logout](#)

SAVE & ADD TO ORGANIZATION

SHOW HELP

12.

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Organization - VTP Test Company

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Add/Edit Members

Administrators with the authority to add members to your organization can follow these steps:

Please complete the information below. All required fields are marked with an *.

Name	Prefix	First	Middle	Last	Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	<input type="text"/>				
Email	<input type="text"/>				
Username	<input type="text"/>				
Password	<input type="text"/>		Confirm Password	<input type="text"/>	
Date Active	<input type="text"/>	Date Inactive	<input type="text"/>		
Role	<input type="text"/>				

10.

11.

II. Attaching Users to an Application

1. Log in as Authorizing Official or Municipal/ Authorizing Official
2. Open the application to which you want to add users.
3. Click on the 'View Management Tools' button, under the Access Management Tools heading.

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My Home | My Applications/Grants | My Monitoring/Reporting | My Requisitions/Claims/Invoices

My Organization(s) | My Profile | Logout

ADD NOTE SHOW HELP

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VEGI Application 2016 Menu

Document Information: [VEGI-APP-2015-GuilfordTestingOrg-00001](#)

Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	VEGI Application 2016	Guilford Testing Organization	Authorizing Official	App In Progress	N/A - N/A N/A

View, Edit and Complete Forms
Select the **View Forms** button below to view, edit, and complete forms.
[VIEW FORMS](#)

Change the Status
Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.
[VIEW STATUS OPTIONS](#)

Access Management Tools
Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.
[VIEW MANAGEMENT TOOLS](#) 3.

II. Attaching Users to an Application, cont.

4. Click on the 'Add/Edit People' link.
5. Check the box next to the appropriate name.
6. Choose their role for this application from the Role dropdown.
7. Add the Access Date in the format shown.
8. Click Save.
9. Click the 'Document Information' link to get back to the application main page.

8. [SAVE](#) [SHOW HELP](#)

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VEGI Application 2016 Menu - Management Tools

The menu below contains links to the tools that can be used to manage this document. See the description below each link for more detail.

Document Information: [VEGI-APP-2015-GuilfordTestingOrg-00001](#)
 9. [Details](#)

Management Tools

[CREATE FULL PRINT VERSION](#)
 Select the link above to create a printable version of the document.

[CREATE FULL BLANK PRINT VERSION](#)
 Select the link above to create a blank printable version of the document.

4. [ADD/EDIT PEOPLE](#)
 Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

[STATUS HISTORY](#)
 Select the link above to view the status

[CHECK FOR ERRORS](#)
 Select the link above to check the entire

[ATTACHMENT REPOSITORY](#)
 Select the link above to view all attach

Current People Assigned

Person	Organization(s)	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/> TrishaAO Standen Email	Green Mountain Coffee Roasters (Authorizing Official), Guilford Testing Organization (Authorizing Official), Freedom Foods (Authorizing Official)	Authorizing Official	5/28/2014	Grant System
<input checked="" type="checkbox"/> Test SAO Email	Guilford Testing Organization (Authorizing Official), King Arthur Flour (Authorizing Official)	Authorizing Official	5/28/2014	Grant System
<input checked="" type="checkbox"/> Test Administrator Email	Guilford Testing Organization (Administrator), Freedom Foods (Administrator)	Administrator	5/28/2014	Grant System
5. <input checked="" type="checkbox"/> Test Writer Email	Guilford Testing Organization (Writer), Freedom Foods (Writer)	6. <input type="text" value="Writer"/>	7. 5/28/2014	Grant System
<input type="checkbox"/> Beverly McAllister Email	Guilford Testing Organization (Financial Officer)	Senior Authorizing Official, Administrator, Financial Officer, Administrator/Financial Officer		
<input type="checkbox"/> Test FO Email	Guilford Testing Organization (Financial Officer), Freedom Foods (Financial Officer)	Writer, Viewer, Financial Officer		



III. DHCD Roles

The following are roles for the applicant organization users:

Municipal/Authorizing Official

A Municipal Official is the highest level user within an applicant organization. The Municipal Official is responsible for certifying that the application and grant submissions by the organization are as accurate as they can be and have been approved by him or her. The Municipal Official can perform all applicant organization related functions (includes submitting application and requisitions), along with the Administrator and Administrator/Financial Officer roles, can initiate applications.

The Municipal Official can assign an Administrator, who has many of the same abilities as the Municipal Official but who lacks the authority to submit some applications.

Administrator

The Administrator for an applicant organization is the second-in-charge. This person will likely oversee much of the day-to-day grant operations along with the Writers and Viewers that he/she assigns. The Administrator has the ability to initiate applications, as well as assign Writer and Viewer roles.

Administrator/Financial Officer

The Administrator/Financial Officer is responsible for overseeing much of the day-to-day grant operations, much like the Administrator, but is also responsible for filling out and submitting requisitions for the grants.

Writer

A Writer for an applicant organization is a person that can contribute to the grant application once it's been initiated, but cannot perform the grant management tasks that may be necessary. This person will not be able to add or disable other accounts to the applicant organization. The Writer must be assigned at the organization level and at the application level.

Viewer

A Viewer has view-only permissions on the grant related information. This person is used as an internal reviewer. The Viewer must be assigned at the organization level and at the application level.

NOTE:

Add all roles to the organization prior to creating the application if possible. All roles, except the Writer and Viewer roles, will be automatically attached to the application. The Writer and Viewer roles must always be attached to both the organization and the application.

If your application is already created, you must attach ALL new users first to the organization, then to the application or any other item that they will be working with.



IV. VEPC Roles

The following are roles for the applicant organization users:

Senior Authorized Official

A Senior Authorized Official (SAO) is the highest level user within an applicant organization. For Vermont Employment Growth Incentive Applications, the SAO holds either the highest position at a local organization, or a management level position at an out of state corporate headquarters. The SAO is responsible for certifying that the application submissions by the organization are as accurate as they can be and have been approved by him or her. The Senior Authorizing Official can perform all applicant organization related functions and along with the Authorizing Official and Administrator roles can initiate applications.

The Senior Authorized Official may not necessarily be the person that performs the most work on the incentive-related items in the system. The Senior Authorized Official can assign an Administrator who has many of the same abilities as the Senior Authorized Official but lacks the ability to submit grant applications and pre-applications.

Authorizing Official

An Authorizing Official (AO) is the second-highest level user within and applicant organization. The AO is responsible for certifying that the application submissions by the organization are as accurate as they can be and have been approved by him or her prior to being sent to the Senior Authorized Official for their organization. The Authorizing Official can perform all applicant organization related functions and along with the Senior Authorized Official and Administrator roles can initiate applications.

The Authorizing Official may not necessarily be the person that performs the most work on the grant-related items in the system. The Authorizing Official can assign an Administrator who has many of the same abilities as the Authorizing Official but lacks the ability to submit grant applications.

Administrator

The Administrator for an applicant organization is generally the person in-charge of managing the application process. This person will likely oversee much of the day-to-day grant operations along with the Writers and Viewers that he/she assigns. The Administrator has the ability to initiate applications.

Writer

A Writer for an applicant organization is a person that can contribute to the grant application once it's been initiated, but cannot perform the incentive management tasks that may be necessary. This person will not be able to add or disable other accounts to the applicant organization. The Writer must be assigned at the organization level and at the application level.

Viewer

A Viewer has view-only permissions on the grant related information. This person is used as an internal reviewer.

NOTE:

Add all roles to the organization prior to creating the application if possible. All roles, except the Writer and Viewer roles, will be automatically attached to the application. The Writer and Viewer roles must always be attached to both the organization and the application.

If your application is already created, you must attach ALL new users first to the organization, then to the application or any other item that they will be working with.