

New User Activating Guide for Authorizing Officials

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

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I. Adding Users to an Organization

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

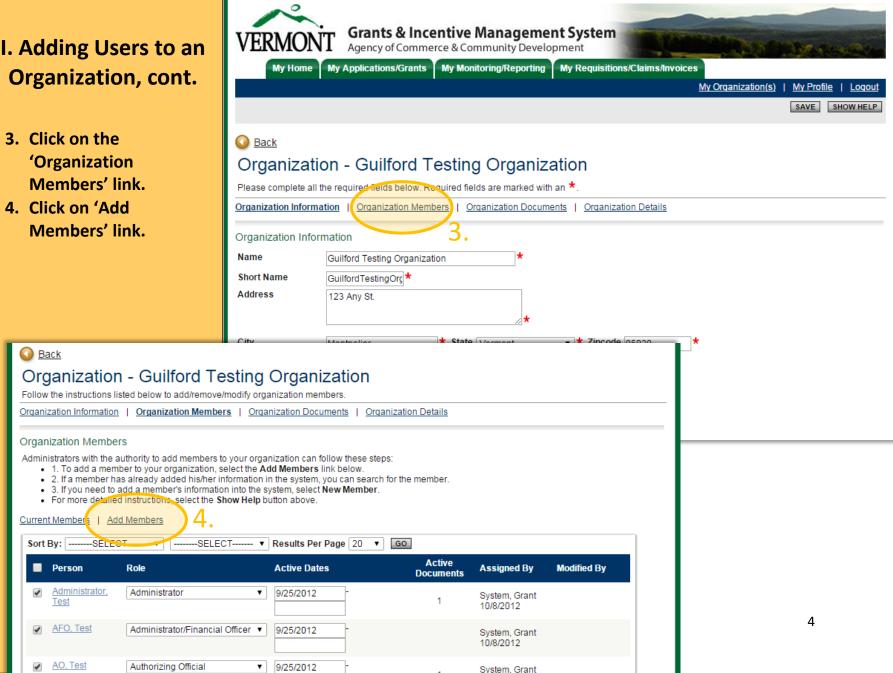
1. The AO is able to add approved users to the organization, as well as approve users if they have NOT created a new user account yet.

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.







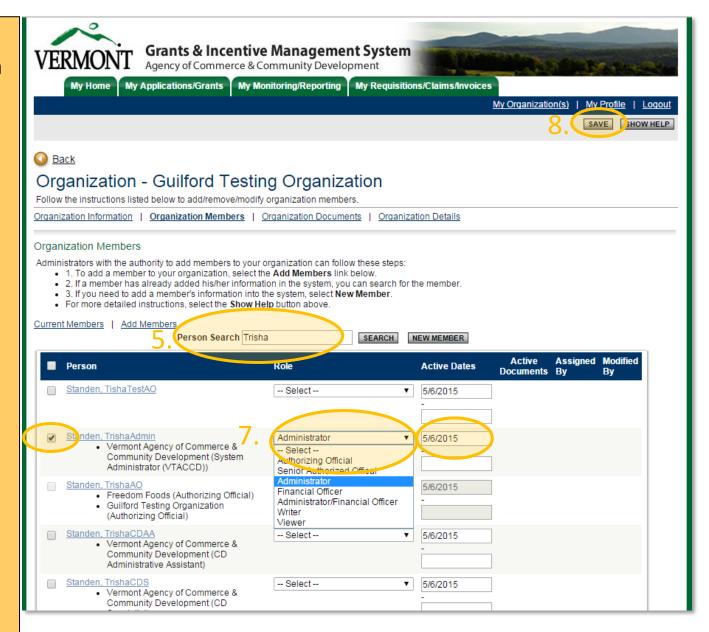
I. Adding Users to an Organization, cont.

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'.



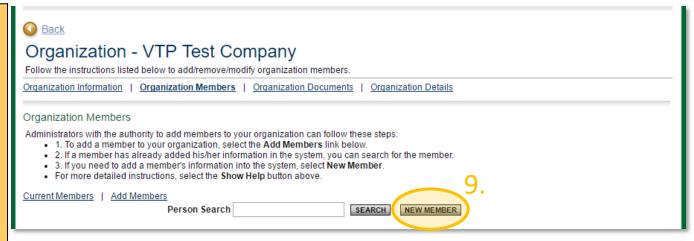
I. Adding Users to an Organization, cont.

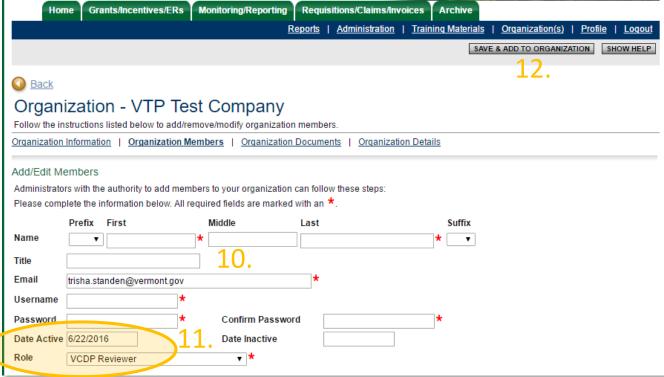
If the user does <u>NOT</u> have a user account:

- 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

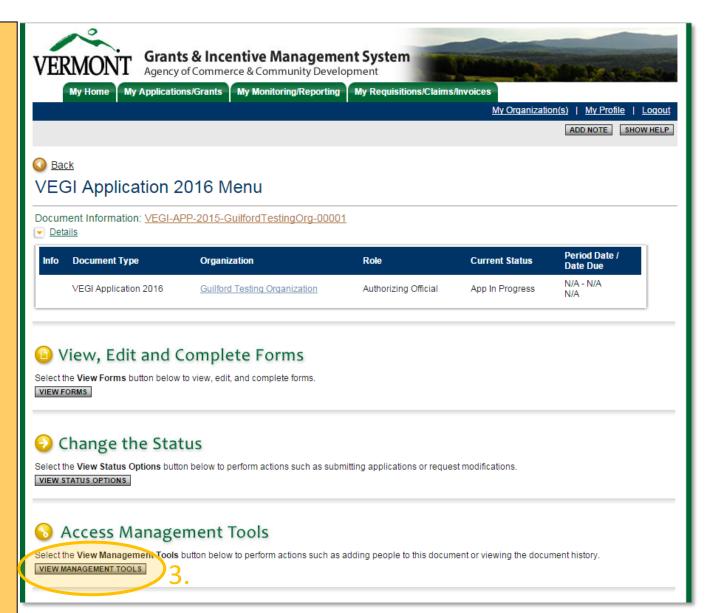
12. Click 'Save & Add to Organization'.





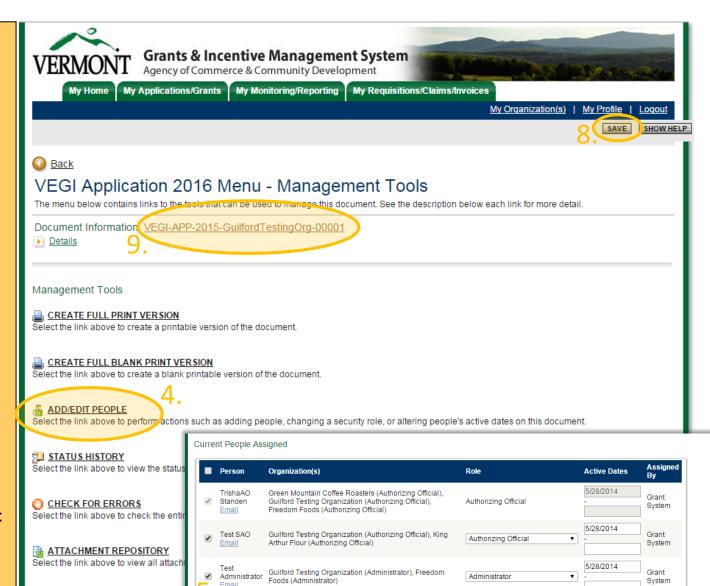
II. Attaching Users to an Application

- 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.



II. Attaching Users to an Application, cont.

- 4. Click on the 'Add/Edit People' link.
- 5. Check the box next to the appropriate name.
- 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.



Guilford Testing Organization (Writer), Freedom Foods

Guilford Testing Organization (Financial Officer), Freedom

Guilford Testing Organization (Financial Officer)

Foods (Financial Officer)

st Writer

Beverly

Email 1

Email

McAllister

5/28/2014

-- Select --Authorizing Official Senior Authorized (

Administrator

Viewer

Financial Officer

Financial Officer

Administrator/Financial Officer

Grant System

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 approve 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 incharge 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.

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