



Account Management Module (AMM) User Guide for Com- mons Users

December 17, 2024

NOTE: This user guide is an identical PDF version of the online help.

Contact Us

Additional Help Needed? Please contact the eRA Service Desk (<https://www.era.nih.gov/need-help>).

Toll-free: 1-866-504-9552; **Phone:** 301-402-7469

Hours: Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

Feedback on the user guide? Please email the eRA Communications Office (era-communications@mail.nih.gov).

Disclaimer STATEMENT

No data shown in illustrations represents any real account, project, or individual. Any resemblance to actual accounts, projects, or individuals is purely coincidental.

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Latest Updates

Updates and new features in AMM:

December 17, 2024

System Accounts Enhancements

The [Create System Account](#) screen now contains the following updates:

- The *User Type* field automatically has **System** selected.
- A new mandatory *Certificate Expiration Date* field.
- The ability to import a certificate file and copy the certificate details to the account creation form.

September 27, 2024

Updated Annual Recertification Report Screen

The Annual Recertification process now has the following enhancements:

- The screen displays all current accounts outside of the annual recertification period.
- The Recertification button is now labeled **Recertify All Accounts and Associated Roles**.
- The hitlist displays the a new column, **Is ROB Signed?**, indicating whether the account owner has read and acknowledged the eRA Rules of Behavior (ROB) on or after October 1 of each year.
- See [Annual Recertification](#) and [System Recertification](#) for more information.

April 4, 2024

New Look and Feel for Some Screens

All remaining screens in AMM have moved to the new visual appearance adopted by other eRA modules. The capabilities remain the same. The screens will adopt the new standard features being incorporated in eRA modules, such as:

- Grid tool to specify how many table rows appear per page Grid tool.
- Download tool icon to export table data to Excel.
- Apps menu icon to navigate to other modules Apps menu icon to navigate to other modules.
- Updated header and footer.
- Action menus and buttons are aligned to the right on all screens.

See [Basics and Navigation for eRA Modules](#) for more information.

July 27, 2023

New Look and Feel for Online Help and User Guide

- The online help and user guide have been updated to the new look and feel, consistent with the new look and feel of eRA Modules. There are no changes to the function of the help topics.

New Name for AMM

- Account Management has been rebranded as Account Management Module (AMM) to distinguish it from the HHS Access Management System (AMS), and the online help has been updated to reflect this change.

Accessing AMM

Users Who Create and Manage eRA Commons Accounts

1. After [logging into Commons](#), access AMM from the Commons welcome screen by clicking the **Account Management (Admin)** tile, or selecting **Admin** from the *Apps* menu.
2. The Administration screen opens. In the top navigation, click the *Accounts* tab and select **Account Management** from the dropdown menu. The *AMM Search Accounts* screen opens.

For instructions on performing a search, see [Search Account](#).

NOTE: If you see an eRA/IMPACII Systems Rules of Behavior page, you must read it over and agree to terms before you are allowed to access IMPACII modules. See [eRA/IMPAC II Rules of Behavior Agreement](#) for more information.

Basics and Navigation for eRA Modules

For increased usability, eRA modules are gradually switching to a streamlined, modern, mobile-friendly look and feel for screens. The new look and the new navigation adjust dynamically for a variety of screen or font sizes, making your browsing experience more efficient on the device of your choice. New user interface elements offer a consistent set of tools that you can use across modules. A new header and footer conserve space, leaving more work area for you to accomplish your tasks.

This topic explores the new navigation and user interface elements that you might see on updated screens. All modules will eventually use the same framework for building the appearance and navigation for screens. Older style screens will co-exist with updated screens during the transition to the new look and feel. Not all screen elements shown here will appear in all modules.

Read this topic to learn about:

- Header/footer for eRA modules
- Navigation to and within modules
- Actions column and how it might be replaced by an ellipsis (three-dot) dropdown in a row
- Standard tools for tables

Header and Footer Navigation

A mixture of older and newer headers may appear throughout screens in eRA Modules. During a period of transition, you will see both older and newer style screens in eRA modules.

The new header and footer use symbols to save screen real estate and dynamically adjust to fit smaller screens.

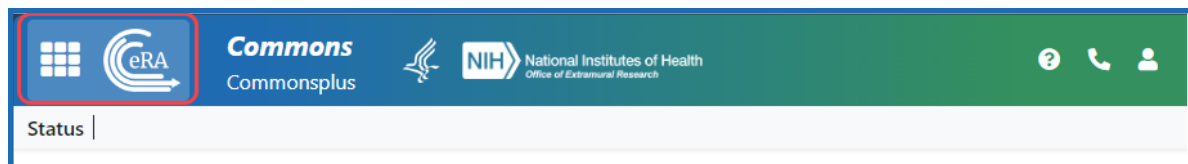


Figure 1: Full eRA Header with Main Menu at left, which displays module navigation, outlined

The first icon from left is the Main Menu. The Main Menu shows all apps available to the currently logged-in user, shown below:

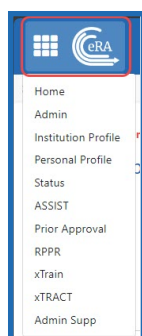


Figure 2: Expanded Main Menu, showing all modules to which you have access

Other Icons in Header



Links to the Department of Health and Human Services.



Links to grants.nih.gov.



Links to a general eRA Service Desk Support page.



Links to eRA Points of Contact page.



The person icon shows your login information, institution, a link to change your password, email preferences, and sign out link:

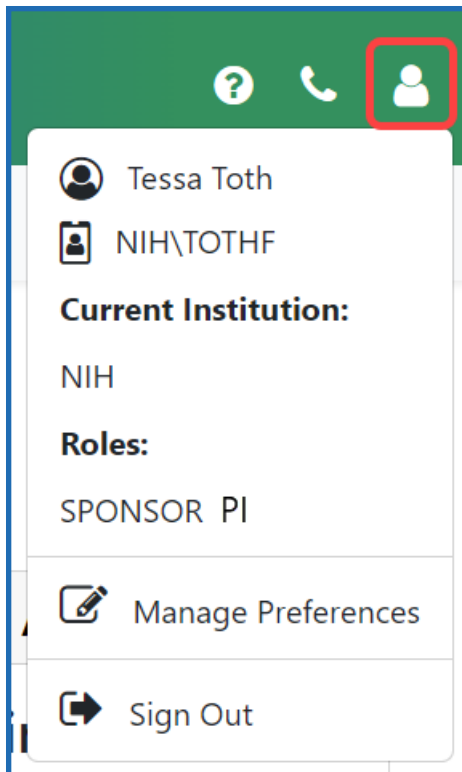


Figure 3: Person icon menu, showing name, user ID, institution, roles, and sign out link

Dynamic Header

Below, on a narrow screen, most items on the header are hidden, but they pop down when you click the grid icon in the upper right, circled below.



Figure 4: Narrow eRA Header, which hides all banner options under a bento box icon, shown at right

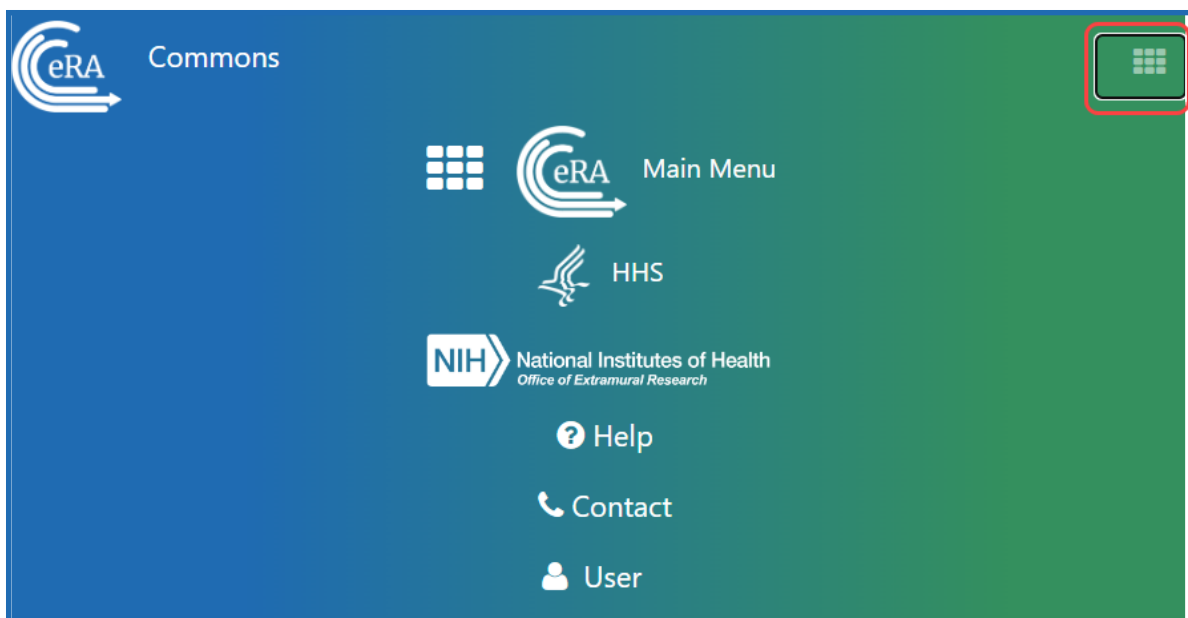


Figure 5: Narrow eRA Header, which has been expanded to show all banner options after bento box icon is clicked

Redesigned Footer

The footer is clean and offers only essential information organized into columns.

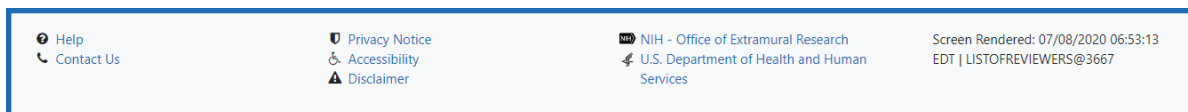


Figure 6: eRA Footer

Navigating Within a Module

The module abbreviation, circled below left, lets you quickly see which module you are working in.

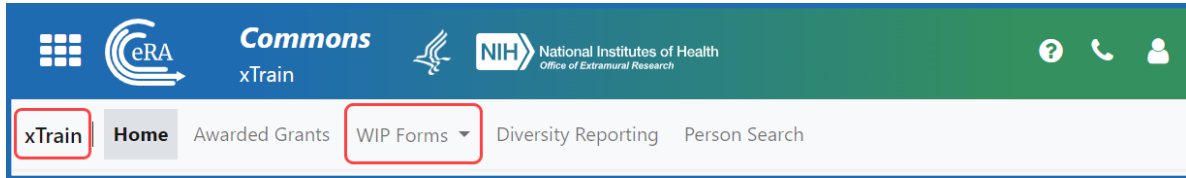


Figure 7: Navigation within a module, showing module name at left and module pages in navigation along top under banner

The sections of the modules are listed across the top, with the current section highlighted in gray, circled above.

To navigate to the screens available under each section, click the section name to see a dropdown that shows all screen names, as shown below.

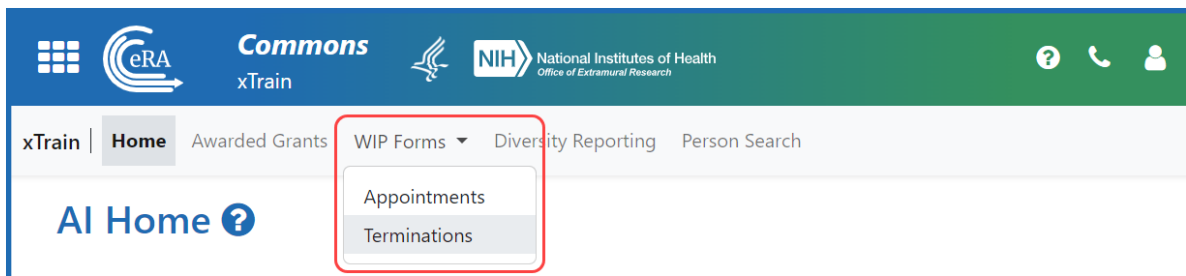


Figure 8: Module Navigation with Dropdowns of Screen Names

If the screen size is small, all the app section names are collapsed under a three-line icon, shown below.

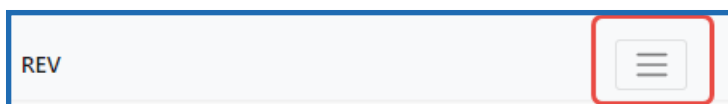


Figure 9: Module Navigation is collapsed when narrow, with bento box icon at right which when clicked shows all module top navigation

When clicked, the three-line icon shows all module navigation in vertical form, below.

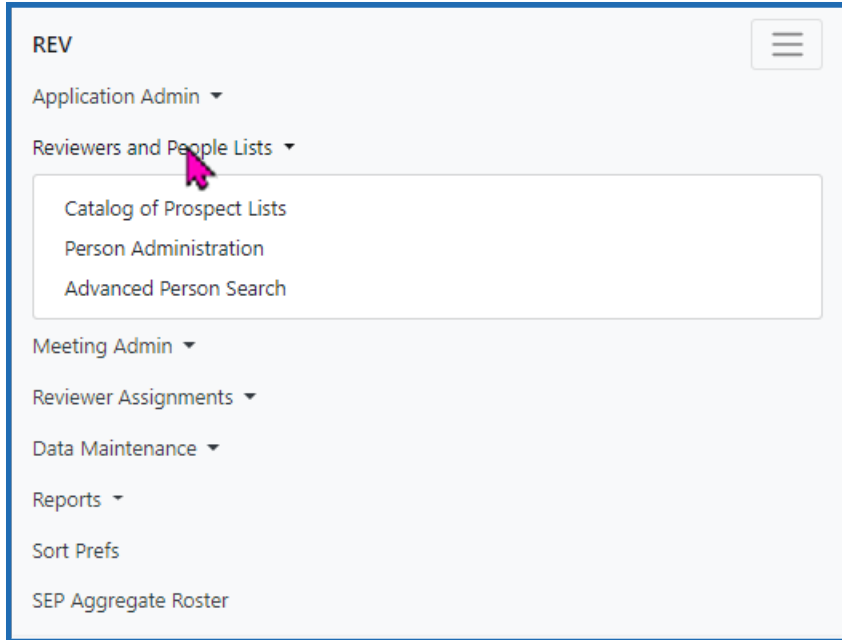


Figure 10: Module navigation expanded, when screen is narrow and all top navigation is under bento box icon at right

Actions Column Replaced by Ellipsis Menu

Actions that are available for each row in a table might be displayed under a three-dot ellipsis icon instead of an **Actions** column, as shown below. This happens if there are three or more actions to be displayed. If only one action item is listed, then the column will list that action as the header and have an 'x' in the body of the column.

A screenshot of a table with two columns: 'Application/Award ID' and 'Grants.gov Tracking #'. The first row has the value '5K08AG050505-02' in the first column and a three-dot ellipsis icon in the second column. A red box highlights the ellipsis icon, and a dropdown menu is open below it, showing two options: 'RPPR' and 'Human Subjects'. The second row has the value '1R21AR020202-01A1 (MPI)' in the first column and is partially obscured by the dropdown menu.

Application/Award ID	Grants.gov Tracking #
5K08AG050505-02	...
1R21AR020202-01A1 (MPI)	RPPR Human Subjects

Figure 11: Three-dot ellipsis menu replaces action menu and displays actions that can be taken on a record in a table

Standard Tools for Tables

Tables are sleeker with tools for showing the data you want to see.

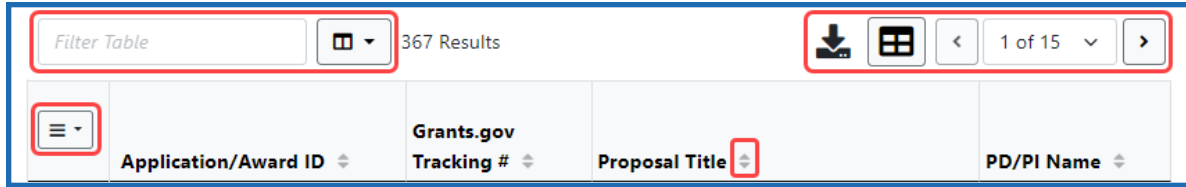


Figure 12: Section of a table header showing standard table tools shown outlined


Filter Table

Entering filter text features instant filtering of the list as you type, with the number of found results updated as you type. The text you type in the filter field is highlighted in the table.



Figure 13: Filter Table Field with Number of Found Results

Selecting Rows/Bulk Action Tool

Use the bulk actions tool  to select or deselect all, and to show selected rows only or all rows. Other bulk action tools might also let you mark or clear the checkboxes of all currently visible rows (such as those found by typing filter text).

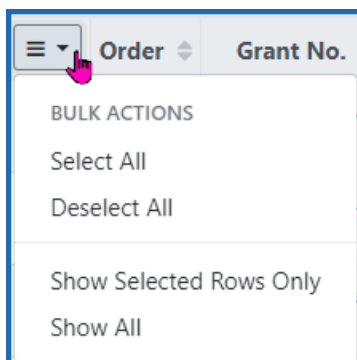


Figure 14: Bulk Actions Tool Lets you Show/Hide and Select/Unselect Rows

Check All

Check All marks all checkboxes regardless of the number of pages of records shown. In other words, if there are 10 pages of records available, with only the first page currently visible, **Check All** marks all enabled checkboxes on all pages. By contrast, **Check All Visible** marks only those enabled checkboxes on the currently visible page. See **Page Navigation** below for directions on how to navigate between pages of data.

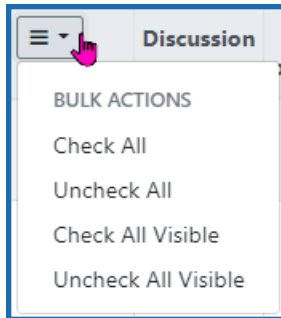



Figure 15: Bulk select tool example

Column Picker

Click the column picker icon  to choose the visible columns in a table by selecting/deselecting their checkboxes. The column selection is only in effect until you navigate to another screen.

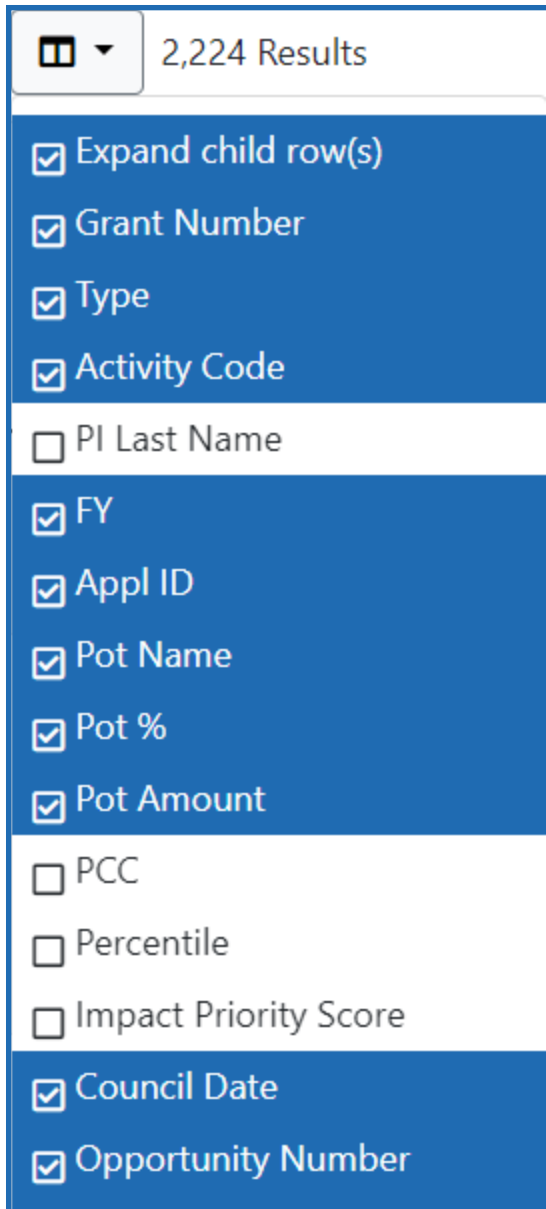


Figure 16: Expanded Column Picker, which lets you choose which columns are visible

Column Sorting

Click column headers to sort by that column.

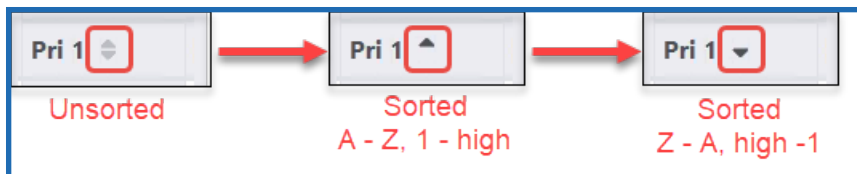



Figure 17: Sort indicators in table columns

Download and Print

Use the download tool , shown below, to export table data to Excel or PDF, or to print. Data from all columns is exported/printed even if only a subset of columns are visible.

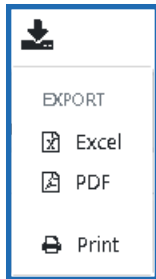



Figure 18: Download Tool lets you print or export to Excel or PDF

Rows Per Page

To help avoid scrolling, use the grid tool  to specify how many table rows appear per page.

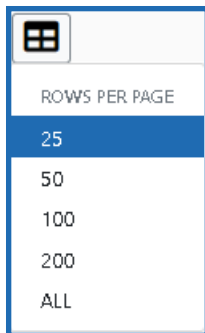


Figure 19: Grid Tool lets you choose number of rows displayed per page

Page Navigation

Navigate to each page of search results using the following tool:

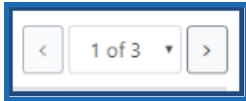


Figure 20: Navigation to move between pages of search results

Instantly scroll back to the top of the page by clicking the "Back to Top" button, which appears on selected screens that show long search results. The button is an up arrow in a yellow rectangle and appears at the bottom right of the screen, when applicable:

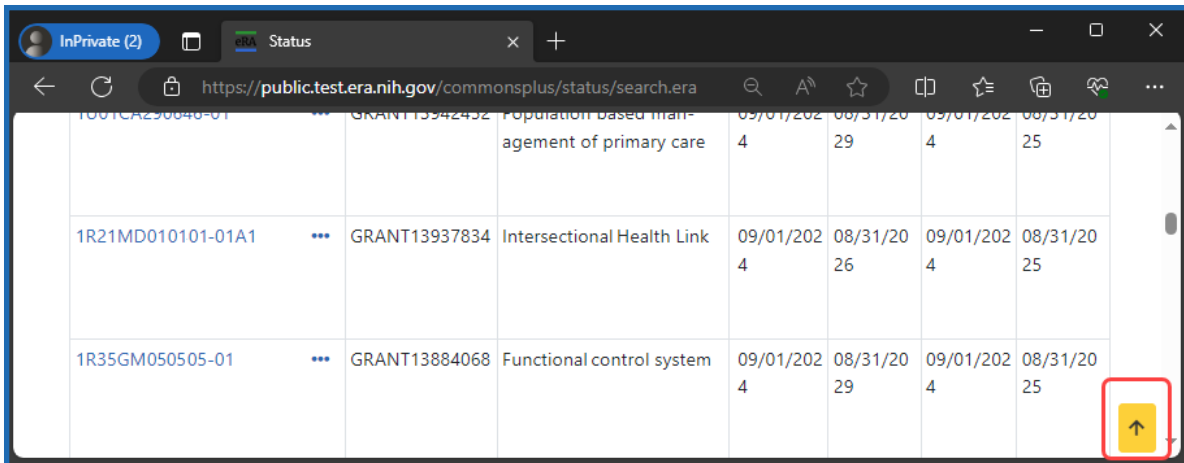


Figure 21: Yellow "back to top" button with up arrow in yellow rectangle, used to instantly scroll to the top of search results

Expanding Table Rows to Reveal More Details

Some tables have an indicator at the beginning of each row that more information can be viewed for the row. If you see a triangle pointing to the right at the beginning of a row, click it for more information on the record.

Relinquishing Statement Search Results

Search Criteria: RS Search Type: Search for Awards

Filter Table 3 Results

Application/Award ID	Proposal Title	PD/PI Name	Application Status	Budget Period Start Date	Budget Period End Date
▶ 2R15GM030303-03	Chlamydia trachomatis	MACNA, MEG	Awarded. Non-fellowships only	06/01/2023	05/31/2026
▶ 5R01ES040404-04	Understanding airway disease	SAALA, INI	Awarded. Non-fellowships only	02/01/2023	01/31/2024
▶ 5R21DC090909-03	Effects of Stimulation for Aphasia	DUNYOG, ELLES	Awarded. Non-fellowships only	09/01/2022	08/31/2024

Figure 22: Triangle shown at beginning of table row indicates that there is hidden information for the row

The triangle turns downwards and expands the row to show additional information.

Relinquishing Statement Search Results

Search Criteria: RS Search Type: Search for Awards

Filter Table [icon] 3 Results [download icon] [grid icon] < 1 of 1 >

Application/Award ID	Proposal Title	PD/PI Name	Application Status	Budget Period Start Date	Budget Period End Date
2R15GM030303-03	Chlamydia trachomatis	MACNA, MEG	Awarded. Non-fellowships only	06/01/2023	05/31/2026
<p>Relinquishing Statements</p> <p>Relinquishing Statement 12586</p> <p>Submitted to Agency</p> <p>RS Submitted Date: 11/14/2023</p>					
SR01ES040404-04	Understanding airway disease	SAALA, INI	Awarded. Non-fellowships only	02/01/2023	01/31/2024
SR21DC090909-03	Effects of Stimulation for Aphasia	DUNYOG, ELLES	Awarded. Non-fellowships only	09/01/2022	08/31/2024

Figure 23: Click the triangle at the beginning of a table row to show more information about the record

Overview

The Account Management Module (AMM) facilitates user and system account administration based on assigned user roles. The system provides the ability to search existing accounts. When a search is performed, all records that meet the search criteria are returned on the *Search Accounts* screen.

Commons Management Staff

Once the institutional account is created, the Signing Official (SO) at each grantee organization is able to establish additional user accounts with various levels of access and capability. The SO or Accounts Administrator (AA) may then create additional accounts for the administrative and scientific staff.

SOs only can also view, create, and maintain system accounts.

User Roles

The following users have the ability to search for, manage and create accounts, and to add or remove roles for user and system accounts:

Commons Management Staff

- Accounts Administrator (AA)
- Administrative Official (AO)
- Business Official (BO)
- Signing Official (SO)

Account Statuses

AMM user accounts can have the following statuses:

- **Active** — A valid account in good standing.
- **Deactivated** — Account has been disabled by an administrator
- **Locked due to inactivity** — Locked by the system due to inactivity (no user activity for 120 days).

- *Pending Affiliation* — Account has not yet been associated to an organization
- *Profile Only* — A profile that is not associated to a user account.

Search for Commons User Accounts

Click on **Account Management (Admin)** to open the AMM *Search Account* screen.

The *Search Accounts* screen for external users provides the ability to search for existing user and system account(s). Selecting either Commons or System in the **User Type** drop-down updates your Search Criteria screen with the search criteria fields appropriate for each User Type.

Commons User Type Search

AMM | Manage Accounts | AMM User Reports

Search Accounts

Search Criteria

NOTE! You must enter at least one search field, besides User Type and Account Status.

User Type: Commons (dropdown)
 Account Status: All (dropdown)
 User ID: [text field]
 Last Name: [text field]
 First Name: [text field]
 Middle Name: [text field]
 Organization(s): [text field]
 Email: [text field]
 Roles: [text field]

Clear Search

Figure 24: Search Accounts Screen for Commons Users

1. Select *Commons* from the **User Type** dropdown field.
2. Enter the appropriate search criteria in at least one of the other search fields.
 - You must enter at least one search field, besides the **User Type** and **Account Status**.
 - Wild card characters such as the percent sign (%) can be used to search for a string of characters.
 - Use the **User ID** field to search by IMPACII user ID.

3. Click the **Search** button to execute the search or click **Clear** to clear the search criteria.

For more information see [Commons User Account Search Results](#).

Search by Role

To search by role, select a role from the **Roles** drop-down menu. To select multiple roles, hold the **<Ctrl>** key as you click the roles.

NOTE: When you search by roles, you can only search within your organization. You can select multiple roles, but the default search is for all roles appropriate to the logged in user's account role.

Search by Status

You can search by status to locate accounts that have been deactivated (by an administrator or due to inactivity). To do so, select the appropriate status from the **Account Status** drop-down menu:

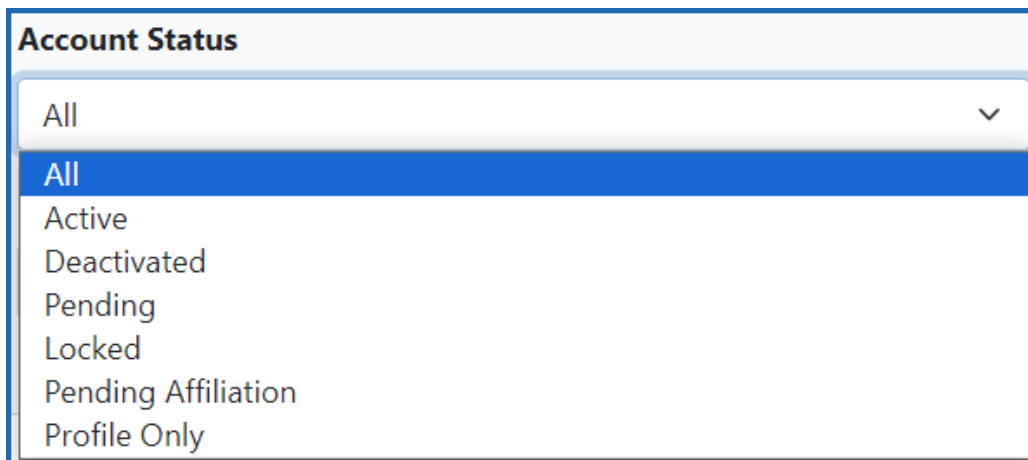


Figure 25: Account Status menu

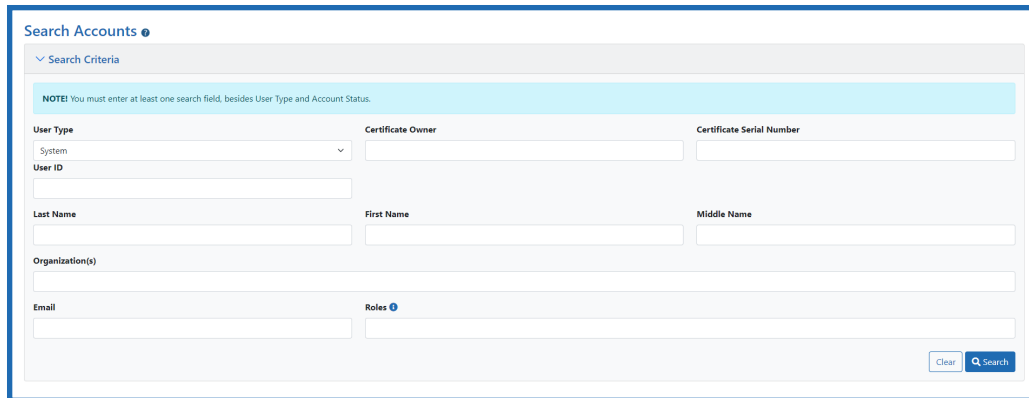
Make your selection and click **Search** to proceed.

Locked Accounts

The status *Deactivated* indicates that the account has been disabled by an administrator, while the status *Locked due to inactivity* applies to accounts that have had no activity for 120 days.

For information on reactivating a deactivated account, contact the [Service Desk](#).

System User Type Search



The screenshot shows the 'Search Accounts' interface. At the top, there is a 'Search Criteria' section with a dropdown arrow. Below it, a light blue note states: 'NOTE! You must enter at least one search field, besides User Type and Account Status.' The search fields are arranged in a grid:

- User Type:** A dropdown menu with 'System' selected.
- Certificate Owner:** A text input field.
- Certificate Serial Number:** A text input field.
- User ID:** A text input field.
- Last Name:** A text input field.
- First Name:** A text input field.
- Middle Name:** A text input field.
- Organization(s):** A text input field.
- Email:** A text input field.
- Roles:** A dropdown menu with a blue circle icon next to it.

At the bottom right, there are two buttons: 'Clear' and 'Search'.

Figure 26: Search Accounts Screen Displaying Searching for System Accounts

1. Select *System* from the **User Type** dropdown field.
2. Enter the appropriate search criteria in at least one of the other search fields.
 - You must enter at least one search field, besides the **User Type** and **Account Status**.
 - Wild card characters such as the percent sign (%) can be used to search for a string of characters.
 - Use the **User ID** field to search by IMPACII user ID.
3. Click **Search** to execute the search or click **Clear** to clear the fields and start over.

Search by Role

To search by role, select a role from the **Roles** drop-down menu. To select multiple roles, hold the **<Ctrl>** key as you click the roles.

NOTE: When you search by system roles, you can only search within your organization. You can select multiple roles, but the default search is for all roles appropriate to the logged in user's account role.

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to the [Web Services Certificate \(S2S\) Guide](#): Section 2.4.3 for Commons users

Commons User Account Search Results

When you click the **Search** button, the **Search Results** display below the Search Criteria on the *Search Accounts* screen.

NOTE: The **Create New Account** button does not display until you perform a search.

Commons Account Search Results

AMM | Manage Accounts AMM User Reports

Search Accounts

> Search Criteria

Search Results

Filter Results: 311 Results

User ID	Name	Email	Account Status	Roles & Affiliations	Login via Login.gov	Action
POTTER4	Potter, James	eRAStage@mail.nih.gov	Active	AA Godric's Hollow Hospital (000000)	OPTIONAL	Manage
POTTER	Potter, Lily	eRAStage@mail.nih.gov	Profile Only		OPTIONAL	Create
HPOTTER	Potter, Harry	eRAStage@mail.nih.gov	Pending		OPTIONAL	Resend Email

[Create New Account](#)

Figure 27: Commons User Account Search Results

Search Results Columns

- **User ID**
- **Name** - last name, first name
- **Email**

- **Account Status** -
 - *Active* - The **Manage** button displays in the **Action** column.
 - *Pending* - The **Resend Email** button displays in the **Action** column.
 - *Pending Affiliation* - The **Manage** button displays in the **Action** column.
 - *Profile Only* - The **Create** button displays in the **Action** column.
- **Roles & Affiliations**
- **Login via Login.gov**
- **Action** - The Action button options are **Manage**, **Resend Email**, and **Create**.

Commons Account Action Options

- **Create Account**
 - To create a new account and profile, click the **Create New Account** button at the bottom of the screen, or find the correct User ID and click the **Create** button.
 - Refer to the [Create Commons User Accounts](#) topic for more information.
- **Manage Account**
 - The **Manage** button appears if the account status is *Active* or *Pending Affiliation*.
 - To edit an account, click the **Manage** button and the Manage Account screen displays.
 - Refer to the [Manage External User Accounts](#) topic for more information.
- **Resend Email**
 - The **Resend Email** button appears on the *Search Accounts* screen for accounts that are pending user review, indicating that the user has not validated the account request.
 - Click **Resend Email** to resend the account confirmation email.

System Account Search Results

AMM | Manage Accounts | AMM User Reports

Search Accounts

> Search Criteria

Search Results

Filter Results: 18 Results

User ID	Name	Organization	Roles & Affiliations	Certificate Owner	Action
DUMBLEDOREA	Dumbledore, Albus	OD - Office of the Director, National Institutes of Health	ACCESS_DOC_UPLOAD_SERV	University of Hogwarts	Manage
GOLDSTEINPT	Goldstein, Tina	University of livermory	APPLICANT_RETRIEVAL_DATA_SERV ◦ University SERVICE_PROVIDER_ROLE SVS_APPLICANT_DATA_ ... read more	University of livermory	Manage
GRINDELWALDG	Grindelwald, Gellert	AI - National Institute of Allergy and Infectious Diseases	IC_DOCSERVICE_GETDOC_SERV	NIAID	Manage
SCAMANDERN	Scamander, Newt	AI - National Institute of Allergy and Infectious Diseases	IC_DOCSERVICE_GETDOC_SERV	NIAID	Manage

[Create New Account](#)

Figure 28: Search Accounts Screen Displaying System Accounts Search Results

Search Results Columns

- **User ID**
- **Name** - last name, first name
- **Organization**
- **Roles & Affiliations**
- **Certification Owner** - The **Certificate Owner** is the organization who acquired the certificate.
- **Action** - Option button is **Manage**.

System Account Action Options

- To manage a system account, click the **Manage** button in the **Action** column. Refer to the [Manage System Accounts](#) topic for more information.
- To create a new account and profile click the **Create New Account** button at the bottom of the screen. Refer to the [Create System Account](#) topic for more information.

Modify Search Results

To view the **Search Criteria**, click anywhere in the **Search Criteria** bar.

1. To filter the search results, enter the appropriate value in the **Filter Table** text box. The hitlist automatically filters matching text as you type.

- a. For example, to view all users with the Internet Assisted Review (IAR) role, type *IAR* in the **Filter Table** text box.
2. To change the number of records per page, select the appropriate number in the **Show per page** icon. The default number of records per page is 10.
3. To navigate between pages, perform one of the following options:
 - a. Click the appropriate **page number** button.
 - b. Click the **right arrow** button to go to the end of the list.
 - c. Click the **left arrow** button to go to the beginning of the list.
4. To sort the search results, click the appropriate column heading name's **down arrow** (ascending sort) or the **up arrow** (descending sort). The default sort is by **Name** (Last Name, First Name).
5. To view the *NIH Support View* screen, select the appropriate name hyperlink in the **Name** column.
 - a. For more information, please see the [NIH Support View](#) topic.
6. If displayed, click the **Read More** hyperlink in the **Roles and Affiliations** column to view a Principal Investigator's (PI) multiple affiliations.
7. To return to the top of the screen, click the yellow **Back to top** icon in the bottom-left corner of the screen.

NIH Funding Support View

The *Funding Support* screen lists the NIH application information associated with the selected Principal Investigator (PI). Use this information to positively identify PIs associated with your institution. Access this screen by clicking on a user's hyperlinked name in the Search Results.

NOTE: The *Funding Support* screen is for Commons users only.

AMM | Manage Accounts | AMM User Reports

Funding Support

Name: Albus S Potter

Filter Table 3 Results 1 of 1

The NIH Support page lists the NIH application information associated with the selected Project Director/Principal Investigator (PD/PI). Use this information to positively identify PD/Pis associated with your institution.

Name ^	Institution Name	Support Type	Support Identification	Support Description	Support Start Date	Support Status
Albus S Potter	UNIVERSITY OF HOGWARTS	Trainee Appointment	5T32NR007-08	Biobehavioral Nursing Research Training Program	2006-03-01	Awarded
Albus S Potter	UNIVERSITY OF HOGWARTS	Trainee Appointment	5T32NR007-07	Biobehavioral Nursing Research Training Program	2005-03-01	Awarded
Albus S Potter	UNIVERSITY OF HOGWARTS	Trainee Appointment	2T32NR007-06	Biobehavioral Nursing Research Training Program	2004-05-01	Awarded

Employment History

Filter Table 2 Results 1 of 1

Position ^	Status	Start Date	End Date	Primary?	Organization
		2002-01-01		✓	St. Mungo's Hospital
		2002-01-01			

Figure 29: Funding Support Screen

Create Accounts

You can create the following types of accounts:



[Create Commons Accounts](#)

[Create System Accounts](#)

Create Commons Account

If you are a Commons user with an SO, AA or BO role, you have the ability to create new Commons user accounts (such as for a PD/PI).

IMPORTANT: PD/PIs cannot create their own accounts: Only an SO or AA Commons user can create this account.

1. To create a new user account, first search AMM to make sure the user doesn't already have an account. For instructions, see [Search Account for Commons Accounts](#)
2. You launch the create-account process from the [Search Results](#) screen.
 - In the search results, profiles that are not already associated to a user account display a **Create** button in the Action column: 
 - Click the **Create** button to create a user account for that profile.
 - Or click the **Create New Account** button located below the search results: 
3. When you click one of the **Create** buttons, the *Create Account* screen opens.

AMM | Manage Accounts | AMM User Reports

Create Account

* Required Fields

User Information

User Type *

Commons

User ID *

Primary Organization *

Contact Information

Last Name * First Name * Middle Name

Email * Confirm Email *


Roles *

+ Add Roles + Add Roles to other org.

Close Clear Create

Figure 30: Create Account Screen for an External Account

Perform the following steps to create an account:

4. Set **User Type** to Commons.
5. Enter the **User ID** or let the system generate one.
 - a. The **User ID** length should be between 6 and 30 characters and should **NOT** contain special characters except the @ sign, the hyphen, the period, and the underscore.
 - b. The system can display the following messages: This User ID is available OR This User ID is already taken, please use another one.
6. Usually the **Primary Organization** defaults to the logged in user's organization.
 - a. If there is no user organization name selected, click the magnifying glass icon  to assign a **Primary Organization**. (See [Set Primary Organization](#) for more information.)
7. Perform one of the following options:
 - a. When the account information is complete, click **Create** to create the account or click **Clear** to clear all information from the form.

When you click **Create**, the system displays the *Account Details* screen with a success message.

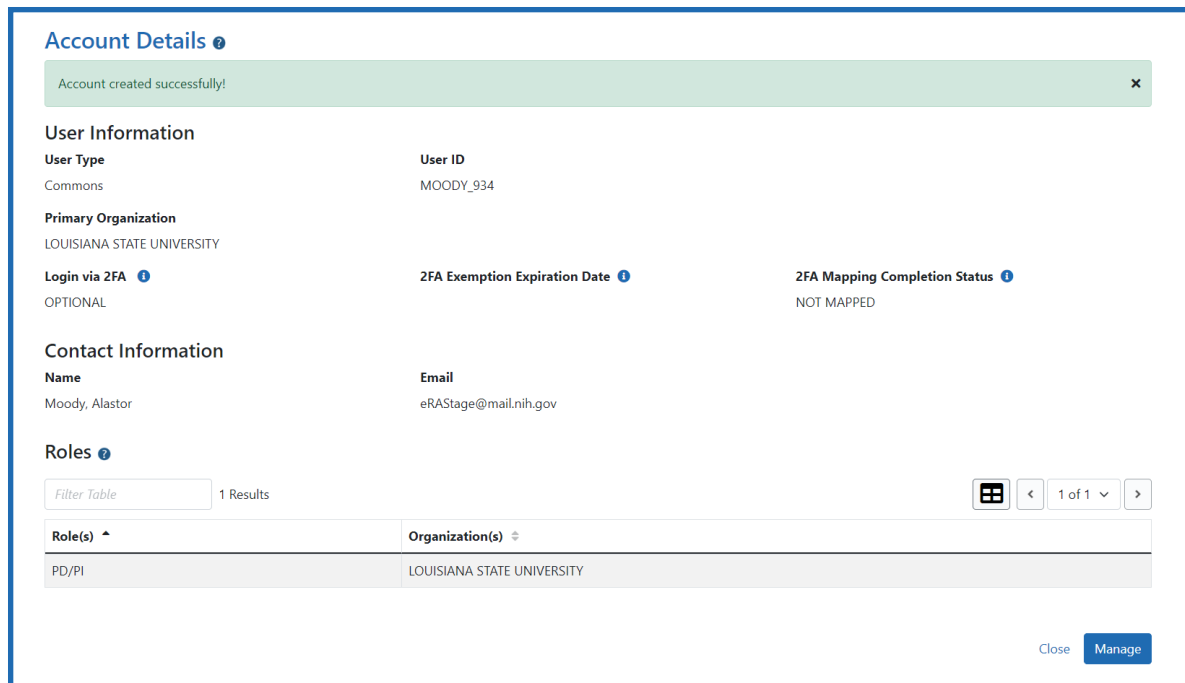


Figure 31: Account Details Screen with success Message

6. Perform one of the following options on the *Account Details* screen:
 - a. To return to the *Search Accounts* screen displaying the previous search results, click the **Go Back** hyperlink.
 - b. To edit the account's information, click the **Manage** button.
 - i. For more information, please refer to the [Manage Account for Commons Users](#) topic.
 - c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

Account Invitations from eRA Systems

Create-Account requests for eRA accounts that are validated by invitations from eRA modules can be approved or rejected automatically:

- If the identifying information the new user submits unambiguously matches the profile created by the account requester and the profile is not already associated to another user account, the request is approved automatically.
- If the identifying information is incorrect or an account already exists for the user profile, or if a comment has been entered in the user's funding and committee service history, request is denied and the system sends notifications to the account requester and to the eRA Service Desk.

Examples of system-generated account invitations:

- **SO creates a new PI account in AMM**

The new PI receives a system-generated invitation to log in to eRA Commons and validate the account.

- **SRO enables a new reviewer in Internet Assisted Review (IAR)**

The reviewer receives a system-generated invitation to log in to eRA Commons and create an account to access IAR. See the [IAR Online Help](#) for information on enabling reviewers

- **PD/PI appoints a new trainee in xTrain**

The trainee receives a system-generated invitation to log in to eRA Commons and create an account to access xTrain. See [xTrain Online Help](#) for information on appointing trainees.

Workflow

The account invitation procedure includes these steps:

1. The account requester creates the new account.
2. The new user receives an email notification that includes the username and other details about the new account.
3. The user receives a second email that includes a temporary password for the new account and instructions for logging into the system. This email explains that that the user must login to the system that day or

- the account will be locked. After an account is locked, any attempt to log in will be redirected to the password reset/lost password workflow.
- The user logs in with the provided credentials and is immediately instructed to create a new password for the account.

NOTE: If the user enters incorrect login information too many times, the account is locked and the user must contact the eRA Service Desk to complete the login process.

Add/Delete User Roles

Agency-Specific Instructions: State Department users only - For information on adding countries, please refer to the Add/Delete Countries topic.

NOTE:

- The list of roles displayed is dependent on the logged in user's role.
- Accounts with scientific roles should be maintained for the career of the scientist, and affiliations should be added as necessary.
- Administrative roles cannot be combined with scientific roles on the same user account, and accounts with administrative roles cannot be affiliated with more than one institution.

To add user roles to an account, click on the **+ Add Roles** button at the bottom of the *Create Accounts* or *Manage Accounts* screen.

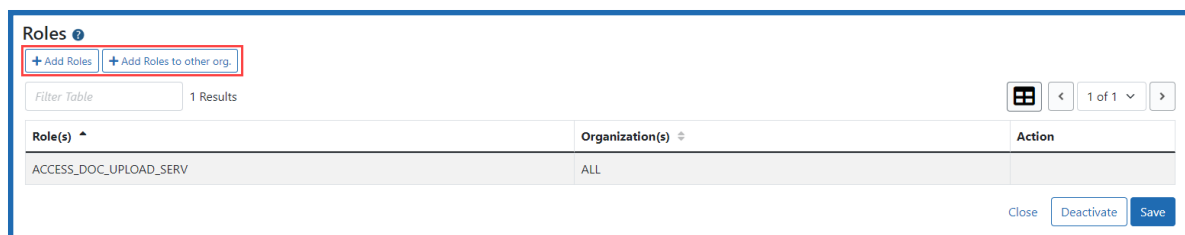
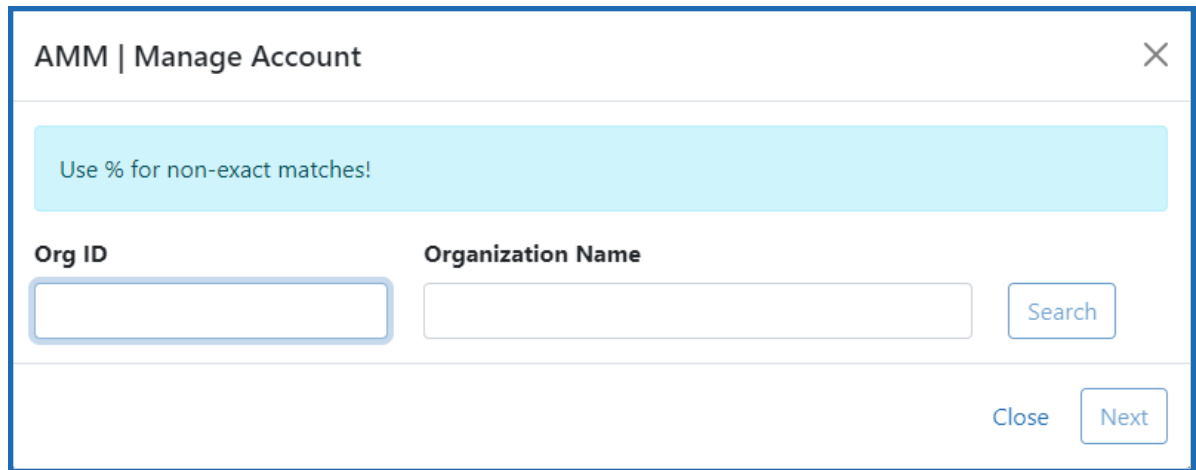


Figure 32: Add Roles buttons on Create Accounts and Manage Accounts screen

When you click **+ Add Roles**, the *Add Roles* screen opens.

NOTE: If you click + **Add Roles to other org**, the *Manage Account* window opens first, so you can search for and select the other organization.



AMM | Manage Account

Use % for non-exact matches!

Org ID

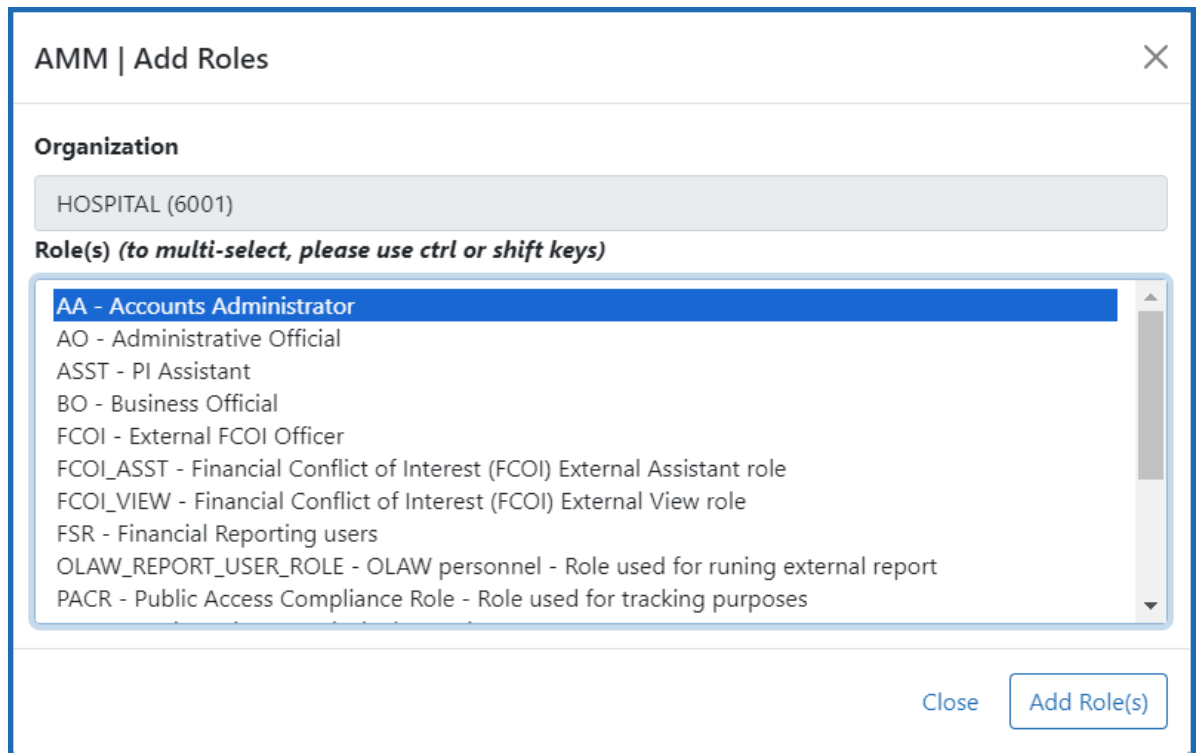
Organization Name

Search

Close Next

Figure 33: Manage Account for Add Roles to Other Organizations

Select the organization and click **Next** to proceed to the *Add Roles* screen as described below.



AMM | Add Roles

Organization

HOSPITAL (6001)

Role(s) (to multi-select, please use ctrl or shift keys)

- AA - Accounts Administrator
- AO - Administrative Official
- ASST - PI Assistant
- BO - Business Official
- FCOI - External FCOI Officer
- FCOI_ASST - Financial Conflict of Interest (FCOI) External Assistant role
- FCOI_VIEW - Financial Conflict of Interest (FCOI) External View role
- FSR - Financial Reporting users
- OLAW_REPORT_USER_ROLE - OLAW personnel - Role used for runing external report
- PACR - Public Access Compliance Role - Role used for tracking purposes

Close Add Role(s)

Figure 34: Add Roles screen

1. Scroll through the list and click to select the appropriate role(s). See the [complete list of Commons user roles](#) for reference.
2. Click the **Add Role(s)** button.

When you click **Add Roles(s)**, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).

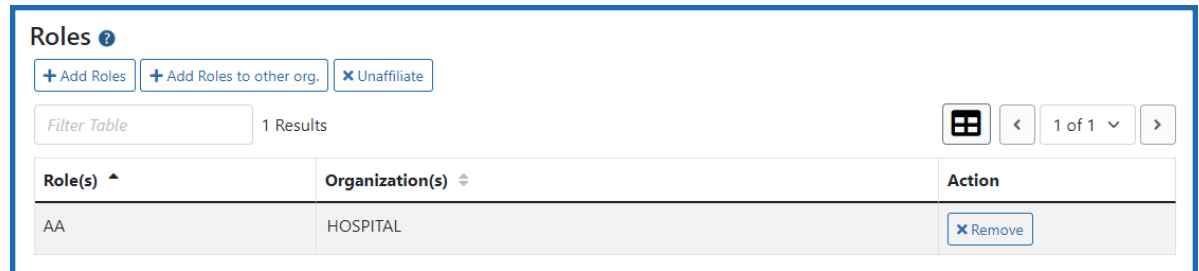


Figure 35: Roles Section on the Create Accounts Screen

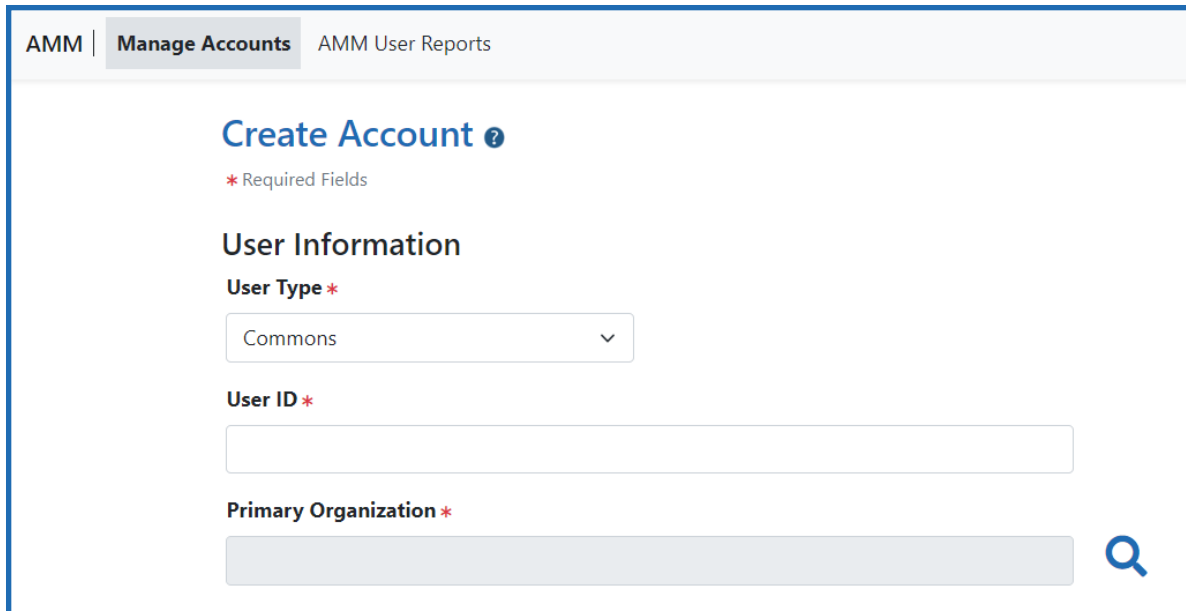
3. To add additional roles, click the **+ Add Roles(s)** button and repeat the steps above.
4. To remove a role, click the appropriate **Remove** button in the **Action** column.
5. To remove all roles, click the **Remove All** button.

NOTE: You cannot remove Signing Official (SO) role when the Research Performance Progress Report (RPPR) is assigned.

NOTE: You cannot add user a role if the account is in deactivated status. You must reactivate the account first.

Set Primary Organization

NOTE: The **magnifying glass** for the **Primary Organization** field on the *Create Account* screen appears if the logged-in user is not affiliated with an Organization, IC, or Agency. Usually the **Primary Organization** defaults to the logged-in user's Organization.




AMM | Manage Accounts AMM User Reports

Create Account

* Required Fields

User Information

User Type *

Commons 

User ID *

Primary Organization *




Figure 36: Primary Organization Field

1. Click the **magnifying glass** icon on the *Create Account* screen to open the *Search Organization and Add Roles* and add a primary organization.
2. Enter an **Org ID** or an **Organization Name**.

NOTE: Use the percent sign (%) before or after a string of characters for wild card searches.

3. Click the **Search** button to display the organization search results.

AMM | Manage Account
✕

Use % for non-exact matches!

Org ID

Organization Name

12 Results

1 of 2

Select ^	Org. ID ⇅	Org. Name ⇅
<input type="radio"/>	10065699	LOUISIANA STATE UNIVERSITY
<input type="radio"/>	4672105	LOUISIANA STATE UNIVERSITY ALEXANDRIA
<input type="radio"/>	577904	LOUISIANA STATE UNIVERSITY AT ALEXANDRIA
<input type="radio"/>	577906	LOUISIANA STATE UNIVERSITY AT EUNICE
<input type="radio"/>	577908	LOUISIANA STATE UNIVERSITY AT SHREVEPORT
<input checked="" type="radio"/>	4672107	LOUISIANA STATE UNIVERSITY BATON ROUGE
<input type="radio"/>	4672101	LOUISIANA STATE UNIVERSITY BATON ROUGE
<input type="radio"/>	4672108	LOUISIANA STATE UNIVERSITY EUNICE

Figure 37: Search Organization and Add Roles Screen

4. To filter the search results, enter the appropriate value in the **Filter Table** text box and hit the **<Enter>** key. For example, enter *San Diego* to view only those universities in California.
5. To change the number of records per page, select the appropriate number in the **Show per page** column.
6. To navigate between pages, perform one of the following options:

- a. Click the appropriate **Page Number** button.
 - b. Click the **right arrow** button to go to the end of the list.
 - c. Click the **left arrow** button to go to the beginning of the list.
7. Select the appropriate organization's radio button.
 8. Click the **Select** button or click the **Close** button to close the screen.

The *Create Account* screen then displays the selected primary organization. For more information see [Create External User Accounts](#).

Create System Accounts

System accounts are used to access eRA [Web Services](#).

Agency and Commons, users can create system accounts.

To create a system account, first perform a search to make sure the account you want to create does not already exist. For instructions see [Search Accounts](#).

NOTE: The + **Create New Account** button described below is not available until you perform a search.

Review the search results to see if the account you want already exists, and if not, create a new account using one of the following options:

1. Click the + **Create New Account** button that appears below the search results:

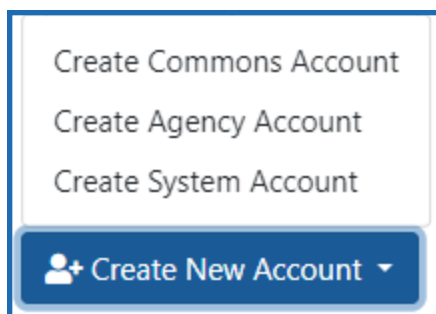


Figure 38: Create New Account button expanded

2. OR, click the ellipsis action menu icon next to a user's name and select **Create System Account Using Profile**:

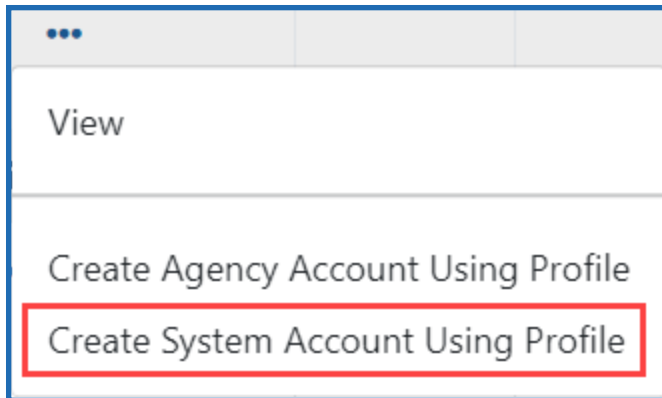


Figure 39: User action menu showing Create System Account Using Profile option

The *Create Account* screen opens. Complete the require fields in the following sections:

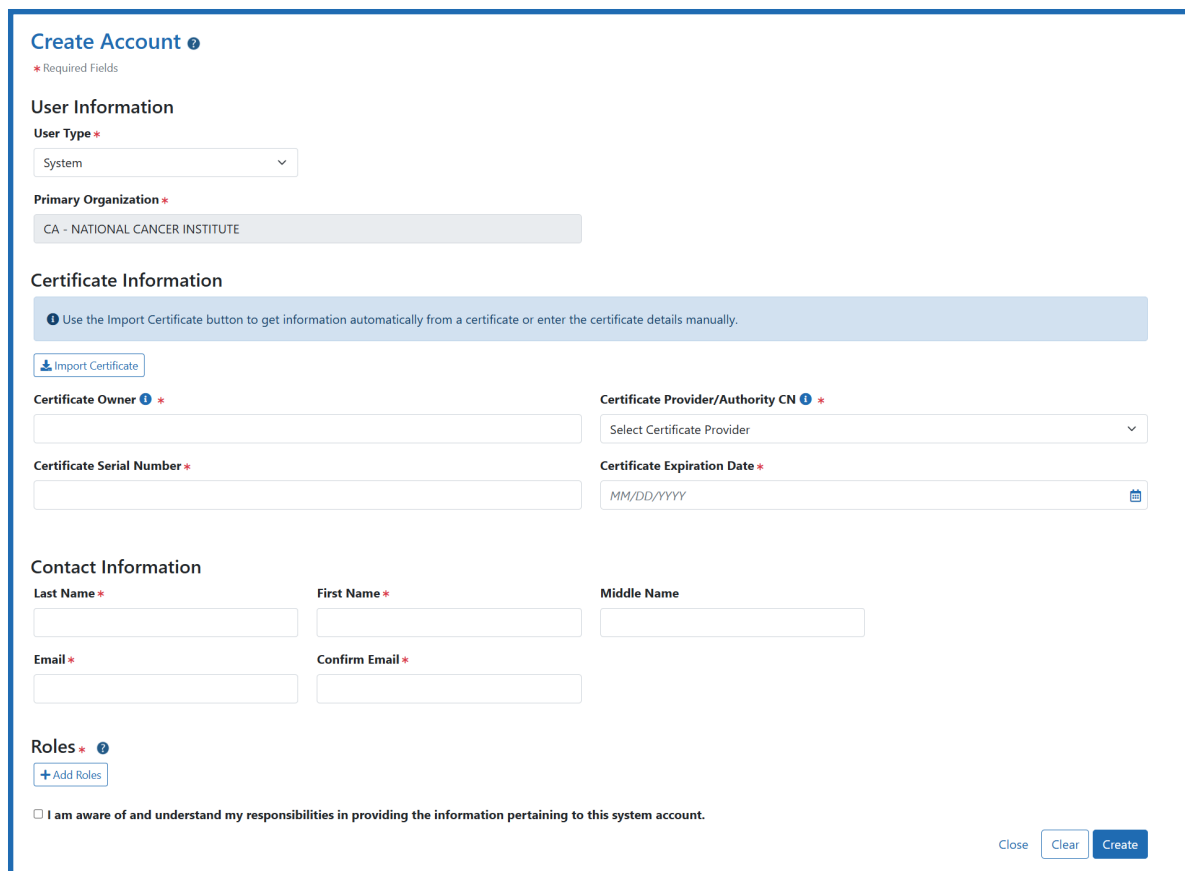
A screenshot of the "Create Account" screen. The title "Create Account" is at the top left. Below it, a red asterisk indicates "Required Fields". The form is divided into several sections: "User Information" with a "User Type" dropdown menu (set to "System") and a "Primary Organization" field (set to "CA - NATIONAL CANCER INSTITUTE"); "Certificate Information" with a blue instruction bar, an "Import Certificate" button, and fields for "Certificate Owner", "Certificate Provider/Authority CN" (dropdown), "Certificate Serial Number", and "Certificate Expiration Date" (calendar icon); "Contact Information" with fields for "Last Name", "First Name", "Middle Name", "Email", and "Confirm Email"; and "Roles" with an "Add Roles" button. At the bottom, there is a checkbox for "I am aware of and understand my responsibilities in providing the information pertaining to this system account." and three buttons: "Close", "Clear", and "Create".

Figure 40: Create Account Screen Displaying Creating a System Account

User Information

- The **User Type** field displays *System* as the prepopulated value.
- The **Primary Organization** field displays the prepopulated Primary IC of the Account Coordinator creating the account. This is a read-only field.

Certificate Information

Complete the certificate information by manually typing all certificate information into the required fields, or use the **Import Certificate** button to automatically import the required information into each field from the certificate file:

Certificate Information

Use the Import Certificate button to get information automatically from a certificate or enter the certificate details manually.

Import Certificate

Certificate Owner *

Certificate Serial Number *

Certificate Provider/Authority CN *

Certificate Expiration Date *

Figure 41: The Create System Account screen's Certificate Information section showing the Import Certificate upload button

Click the **Import Certificate** button to upload a certificate file:

1. Drag and drop a file to the upload field or click Browse to select the file from your computer.

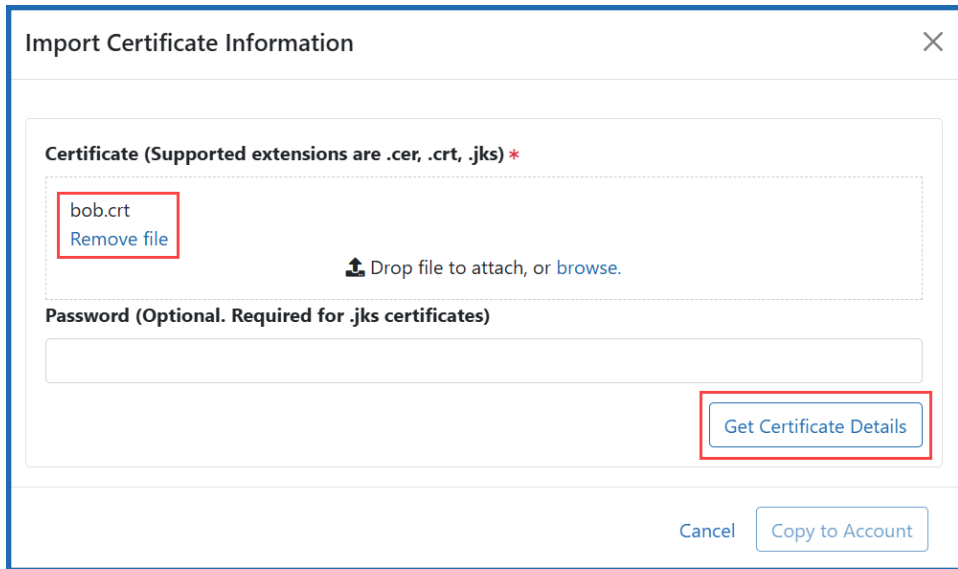


Figure 42: Import Certificate Information upload popup

2. Click the **Get Certificate Details** button to retrieve certificate details from the uploaded file.

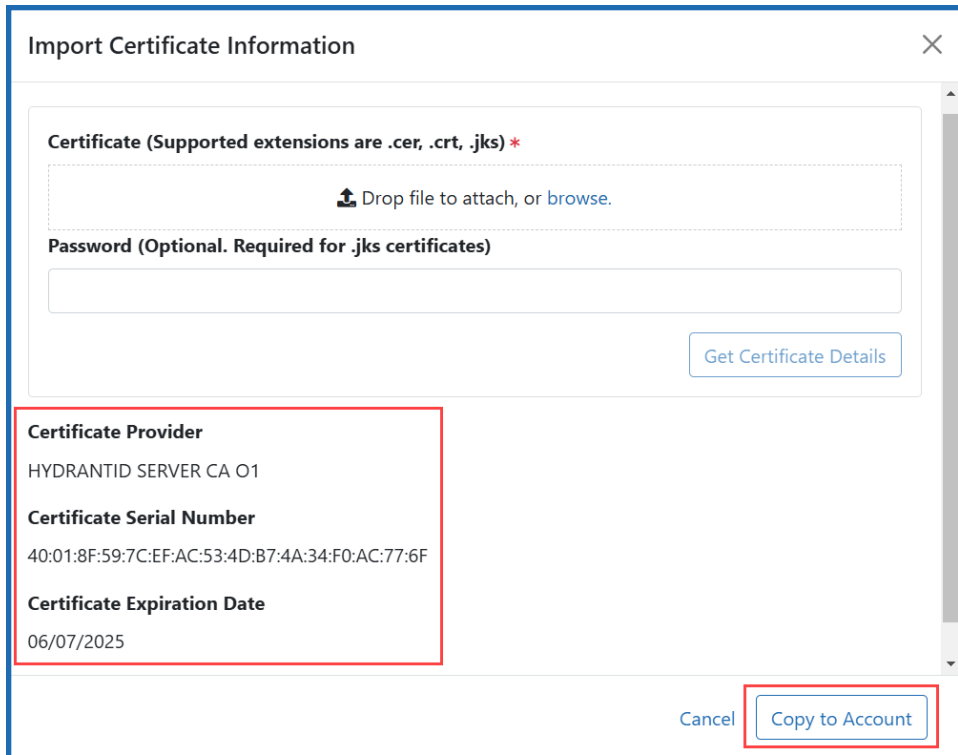


Figure 43: Import Certificate Information popup showing Certificate Details and Copy to Account button

3. Click the **Copy to Account** button to return to the *Create Account* screen with the information imported into the appropriate fields.

If you are manually entering the certificate information, type the required information in the following fields:

1. **Certificate Owner** — enter the organization who acquired the certificate.
2. **Certificate Provider/Authority CN** — select the appropriate provider from the drop-down menu.

TIP: Examples of the values that are available for the Certificate Provider/Authority include: Comodo, Digicert, Entrust, Geo Trust, Go Daddy, InCommon, and Thawte.

3. **Certificate Serial Number** — enter in the format XX:XX:XX:XX:XX:XX:XX.
4. **Certificate Expiration Date** — enter or select from the calendar picker field.

For information on obtaining and registering a certificate from a Certificate Provider or Authority, refer to one of the [Web Services Certificate \(S2S\) Guide](#):

- Section 2.4.3 for Commons users - only users with the SO role have the privileges necessary to register the certificate in AMM; Commons users must work with their SO to register their certificate

Contact Information

Complete the following fields:

- Last Name
- First Name

- Middle Name (optional)
- Email
- Confirm Email

Roles

Click the **Add Roles** button to add the roles to the account. The *Add Roles* popup displays.

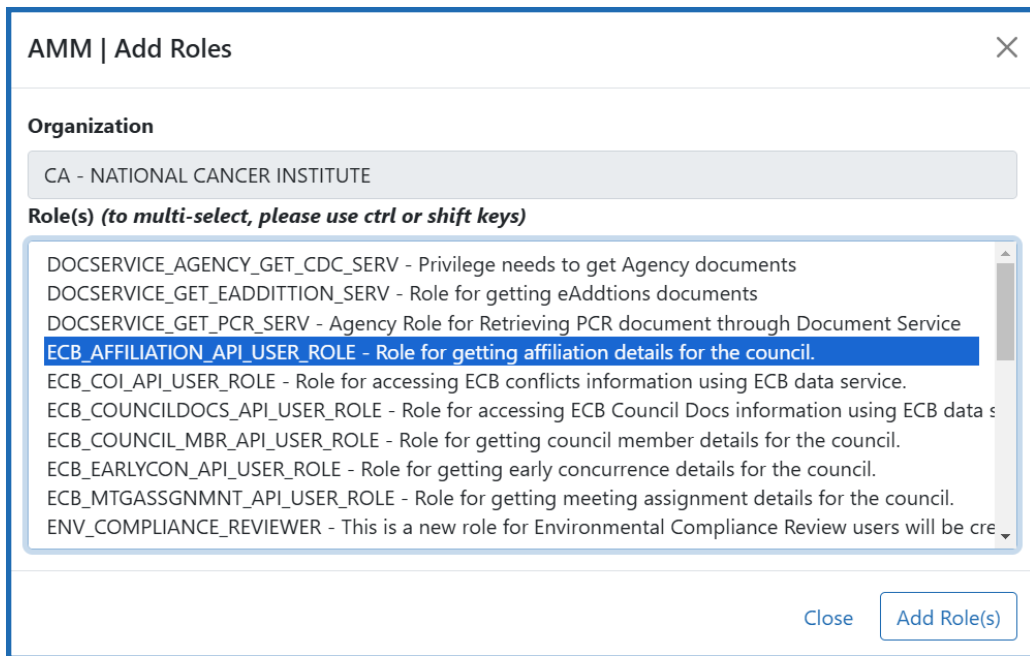


Figure 44: Add Roles popup for Create System Account

- Note the role description on the screen when adding a role.
- See [Add System Roles](#) for more information.

Select the **Agreement** checkbox below the *Roles* section.

Roles ✖

[+ Add Roles](#) [✖ Remove All](#)

Filter Table 1 Results

Role(s) ^	Organization(s) ▾	Action
ECB_AFFILIATION_API_USER_ROLE	CA - NATIONAL CANCER INSTITUTE	✖ Remove

I am aware of and understand my responsibilities in providing the information pertaining to this system account.

Close [Clear](#) [Create](#)

The **Agreement** check box is mandatory for the user to acknowledge information provided for the system account. If the **Agreement** checkbox is not checked and the **Save** button is clicked, the system displays the following error message: *User must accept the agreement by checking the field.*

3. Click the **Create** button to create the account or click **Clear** to clear all fields.

When you click **Create**, the system validates the account information. If there are no errors, then the *Account Details* screen opens, displaying a success message.

Other Actions:

- Click the **Validate Certificate** button to validate the certificate. See [Validate Certificate](#) for more information.
- Click the **Manage** button if you want to make additional changes. See [Manage System Accounts](#) for more information.
- Click the **Back to Search** button to return to the *Search Account* screen.

Add System Roles

NOTE: The list of roles is dependent on the logged-in user's role.

1. To add system roles to the account, click on the **+ Add Roles** button on the *Create Accounts* or *Manage Accounts* screen.

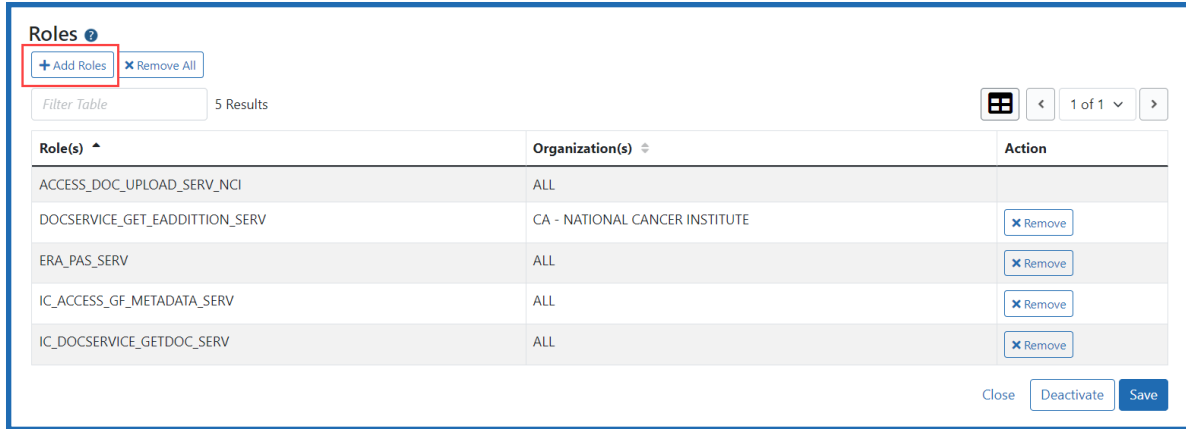


Figure 45: Add Roles Button on the Create Account Screen

Clicking the + **Add Roles** button displays the *Add Roles* pop-up screen.

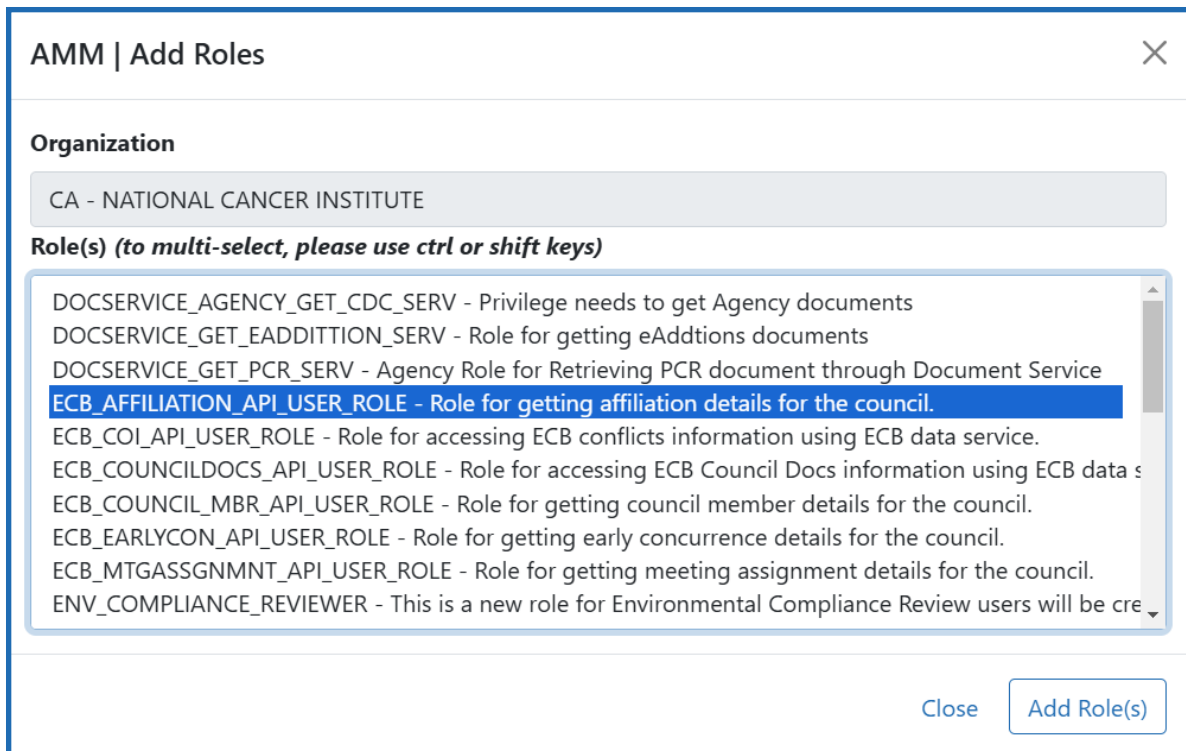


Figure 46: Add Roles Screen Displaying Agency System Roles List

1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

Clicking the **Add Roles(s)** button returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).

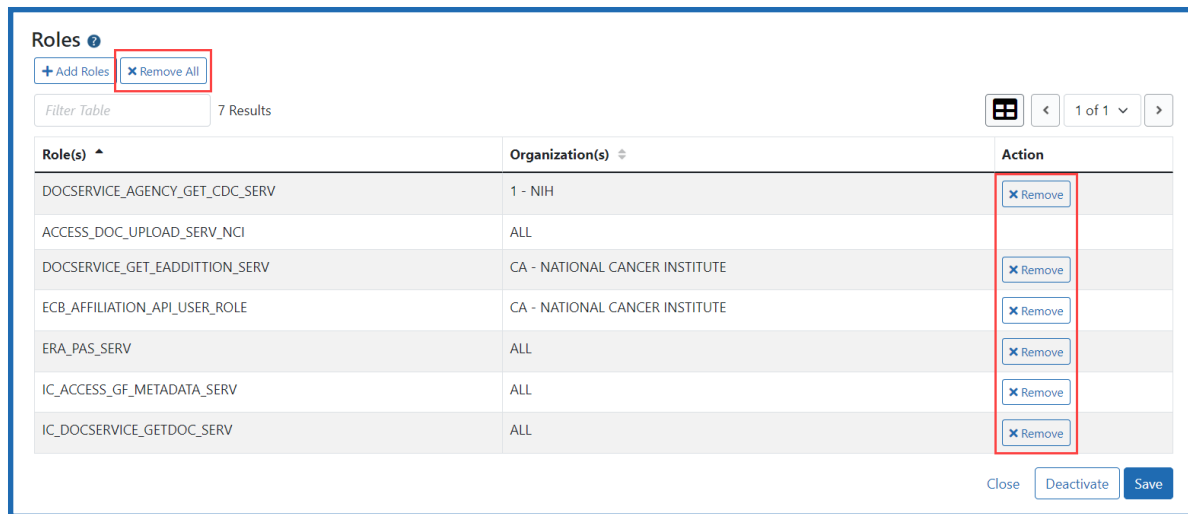


Figure 47: Roles Section on the Create Accounts Screen for Agency Users

3. To add additional roles, click the **+ Add Roles(s)** button. Repeat the steps above.
4. To remove a role click the appropriate **Remove** button in the **Action** column.
5. To remove all roles click the **Remove All** button.

Validate Certificate

When the **Validate Certificate** button is clicked on either the *Manage Account* or *Account Details* confirmation screen, the system displays the *AMM | Validate Certificate* screen with hyperlinks to instructions for the different browsers (i.e. Internet Explorer, Firefox, and Safari, etc.) for uploading a certificate file.

Perform one of the following options:

1. To validate the certificate, click the **Validate** button on the *Validate Certificate* screen.
2. Click the **Cancel** button to cancel the certificate validation.

AMM | Validate Certificate

Certificate Number:

40:01:87:90:D1:D1:12:65

Certificate Provider: SERVER CA 01



NOTE! If your certificate was not previously uploaded, please follow instructions below to upload certificate key file to browser.

- Do not close browser window until all instructions are complete.
- If instructions for a specific browser require a browser restart, please do so.

To Import a Certificate to Browsers

Please follow instructions below to upload certificate file to browser.



For Windows IE:

1. Open Tools
2. Open Internet options
3. Open Content tab
4. Click Certificate button and open Certificates window
5. Click Import to start the Certificate Import Wizard
6. Type the file name containing the certificate to be imported or browse and navigate to the file
7. For more details go to "Learn more about certificates" link on the Certificates window



For Firefox:

Please click [here](#) for detailed instructions.

Figure 48: Validate Certificate Screen

Click the **Validate** button to perform the certificate validation.

If the browser call does go through to the certificate provider, but the details of the uploaded certificate do not match the details entered in AMM, then the following warning message displays:

Warning! - This certificate works with eRA systems correctly, but the certificate details you entered in the account do not match information in the certificate you are trying to validate. Certificate information in the account must match certificate you are trying to validate.

If there are no validation errors, a second *Validate Certificate* screen displays the following success message: *Success! Your certification works with the eRA systems as expected.*

Click the **Close** button to close the screen.

The following audit information is audited and stored in the database:

- Certificate Number – Certificate Number of the uploaded certificate during validation
- Certificate Provider – Common Name of the uploaded certificate during validation
- Certificate Owner – The Certificate Owner that was entered during validation. The Certificate Owner is the organization who acquired the certificate.
- Time of Validation – Format: DD/MM/YYYY HH:MM:SS
- Result of Validation Attempt
 - Success
 - Validation is successful but the certificate details does not match the user entered details

Manage Accounts

User Accounts

Once an account is created it can be maintained via the *Manage Accounts* screen.

- [Manage User Accounts](#)

System Accounts

Agency and Commons users can modify system accounts.

- [Manage System Accounts](#)

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to the [Web Services Certificate \(S2S\) Guide](#):

- Section 2.4.3 for Commons users

Managing Commons User Accounts

The following roles can manage accounts:

- Account Administrator (AA)
 - Administrative Official (AO)
 - Business Official (BO)
 - Signing Official (SO)
1. Perform one of the following steps to manage a user account:
 - a. Click the **Manage** button for an account on the [Search Accounts](#) screen.
 - b. Click the **Manage** button on the *Account Details* screen after an account have been created or saved (edited).

Clicking the **Manage** button opens the Manage Account screen.

Manage Account ✕

Note: Changes to the account are **not saved** until you hit the save button.
 - For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.

* Required Fields

User Information

Account Status: Active

User Type *

User ID *

Primary Organization *
 🔍

Login via 2FA ⓘ : OPTIONAL

2FA Exemption Expiration Date ⓘ :

2FA Mapping Completion Status ⓘ : NOT MAPPED

Contact Information

Last Name * **First Name *** **Middle Name**

Email * **Confirm Email ***

Roles 🔍

Filter Table 1 Results 🔍 < 1 of 1 >

Role(s) ^	Organization(s) ⇅	Action
AA	MINISTRY OF MAGIC	<input type="button" value="X Remove"/>

Figure 49: Manage Account screen for an external account

Actions

You can perform the following actions:

- Edit the **Email** addresses if necessary.
- Add Roles. To add or delete roles click the **+ Add Roles** button. For more information, see [Add/Delete Roles](#).
- To affiliate an account with an organization, click the **Affiliate** button, if displayed. (An affiliation can be created for accounts that are either not currently associated with an institution, such as an account solely with the Internet Assisted Reviewer (IAR) authority role, or for accounts that need to be associated with multiple institutions. Users with the

AA or SO role may create an affiliation for their organization only. For more information, see [Affiliate Account](#).

- If the **Unaffiliate** button is present, you can click it to unaffiliate an account. For more information, see [Unaffiliate Account](#).
- Two-Factor Authentication:
 - **Login via 2FA** — Shows the status of login.gov for this account: "Required," "Optional" or "Exemption." This field is set automatically at the organization level.
 - **2FA Exemption Expiration Date** — When *Login via 2FA* is set to "Exemption," this field displays the end date for the exemption. The user can log in using eRA credentials until this date.

NOTE: Two-factor authentication exemptions are only granted on a limited basis by the eRA Service Desk and only the eRA Service Desk can modify this date.

- **2FA Mapping Completion Status** — Indicates whether the user's account is Mapped or Not Mapped for two-factor authentication.

NOTE: Administrators do not have the ability to deactivate or reactivate accounts, and should contact the Service Desk for assistance on a case-by-case basis.

Account Statuses

AMM user accounts can have the following statuses:

- **Active** — A valid account in good standing.
- **Deactivated** — Account has been disabled by an administrator
- **Locked due to inactivity** — Locked by the system due to inactivity (no user activity for 120 days)
- **Pending Affiliation** — An individual account that has not been linked to an organization
- **Profile Only** — A user ID that is not associated to an account

NOTES:

- Administrative and reporting roles such as SO, AA, AO, FSR, etc., cannot be combined with Scientific roles such as PI, TRAINEE, ASST, etc.
-

- Only accounts with scientific roles such as IAR, PI, TRAINEE, POSTDOC, etc., may have multiple affiliations. If an account has any roles in addition to these, additional affiliations cannot be added.
- Fields grayed out cannot be edited.

Add/Delete User Roles

Agency-Specific Instructions: State Department users only - For information on adding countries, please refer to the Add/Delete Countries topic.

NOTE:

1. The list of roles displayed is dependent on the logged in user's role.
2. Accounts with scientific roles should be maintained for the career of the scientist, and affiliations should be added as necessary.
3. Administrative roles cannot be combined with scientific roles on the same user account, and accounts with administrative roles cannot be affiliated with more than one institution.

To add user roles to an account, click on the **+ Add Roles** button at the bottom of the *Create Accounts* or *Manage Accounts* screen.

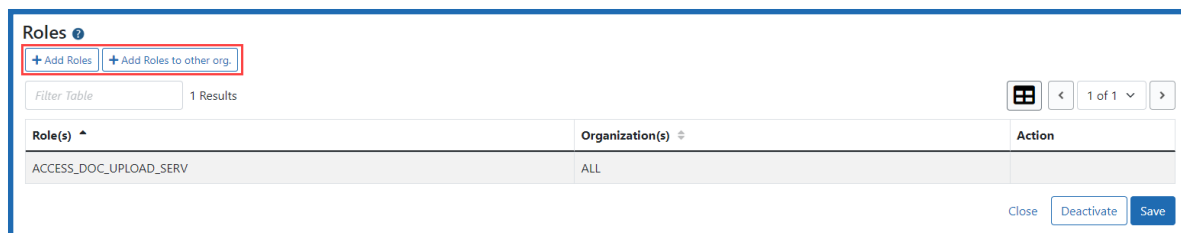


Figure 50: Add Roles buttons on Create Accounts and Manage Accounts screen

When you click **+ Add Roles**, the *Add Roles* screen opens.

NOTE: If you click **+ Add Roles to other org**, the *Manage Account* window opens first, so you can search for and select the other organization.

AMM | Manage Account

Use % for non-exact matches!

Org ID

Organization Name

Search

Close Next

Figure 51: Manage Account for Add Roles to Other Organizations

Select the organization and click **Next** to proceed to the *Add Roles* screen as described below.

AMM | Add Roles

Organization

HOSPITAL (6001)

Role(s) (to multi-select, please use ctrl or shift keys)

- AA - Accounts Administrator
- AO - Administrative Official
- ASST - PI Assistant
- BO - Business Official
- FCOI - External FCOI Officer
- FCOI_ASST - Financial Conflict of Interest (FCOI) External Assistant role
- FCOI_VIEW - Financial Conflict of Interest (FCOI) External View role
- FSR - Financial Reporting users
- OLAW_REPORT_USER_ROLE - OLAW personnel - Role used for running external report
- PACR - Public Access Compliance Role - Role used for tracking purposes

Close Add Role(s)

Figure 52: Add Roles screen

1. Scroll through the list and click to select the appropriate role(s). See the [complete list of Commons user roles](#) for reference.
2. Click the **Add Role(s)** button.

When you click **Add Roles(s)**, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).

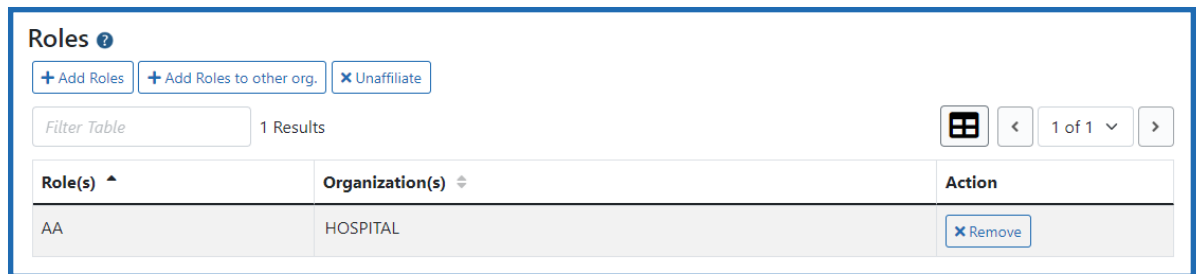


Figure 53: Roles Section on the Create Accounts Screen

3. To add additional roles, click the **+ Add Roles(s)** button and repeat the steps above.
4. To remove a role, click the appropriate **Remove** button in the **Action** column.
5. To remove all roles, click the **Remove All** button.

NOTE: You cannot remove Signing Official (SO) role when the Research Performance Progress Report (RPPR) is assigned.

NOTE: You cannot add user a role if the account is in deactivated status. You must reactivate the account first.

Affiliate Account

1. To affiliate an existing account with an organization, search for the user account in AMM and click the **Manage** button for the account.
2. Click the **Affiliate** button under *Roles* on the *Manage Account* screen:

AMM | Manage Accounts AMM User Reports

Manage Account

Note: Changes to the account are **not saved** until you hit the save button.
- For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.

* Required Fields

User Information

Account Status: Active

User Type: Commons

User ID: MOODY16

Primary Organization: STATE UNIVERSITY (5612)

Login via 2FA: OPTIONAL

2FA Exemption Expiration Date: MM/DD/YYYY

2FA Mapping Completion Status: NOT MAPPED

Contact Information

Last Name: Moody First Name: Alastor Middle Name:

Email: eRATest@mail.nih.gov Confirm Email: eRATest@mail.nih.gov

Roles

+ Affiliate

Filter Table 1 Results

Role(s)	Organization(s)	Action
TRAINEE	STATE UNIVERSITY	

Close Save

Click the **Affiliate** button to open the *Add Roles* screen:

NOTE: The list of roles is dependent on the logged in user's role.

AMM | Add Roles ✕

Organization

HOSPITAL (6001)

Role(s) (to multi-select, please use ctrl or shift keys)

- AA - Accounts Administrator
- AO - Administrative Official
- ASST - PI Assistant
- BO - Business Official
- FCOI - External FCOI Officer
- FCOI_ASST - Financial Conflict of Interest (FCOI) External Assistant role
- FCOI_VIEW - Financial Conflict of Interest (FCOI) External View role
- FSR - Financial Reporting users
- OLAW_REPORT_USER_ROLE - OLAW personnel - Role used for runing external report
- PACR - Public Access Compliance Role - Role used for tracking purposes

Close Add Role(s)

Figure 54: Add Roles screen

1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

When the **Add Role(s)** button is clicked, the role is added, the account is placed in 'Active' status, and the **Unaffiliate** button appears in the *Roles* section:

Roles ⓘ

+ Add Roles
+ Add Roles to other org.
x Unaffiliate

Filter Table 1 Results 🗪 < 1 of 1 >

Role(s) ^	Organization(s) ▾	Action
AA	HOSPITAL	x Remove

Figure 55: Roles section on the Manage Account screen

Unaffiliate Account

1. To unaffiliate an account, click the **Unaffiliate** button in the *Roles* section of the *Manage Account* screen.

When the **Unaffiliate** button is clicked, an *Account Unaffiliation* pop-up screen displays.

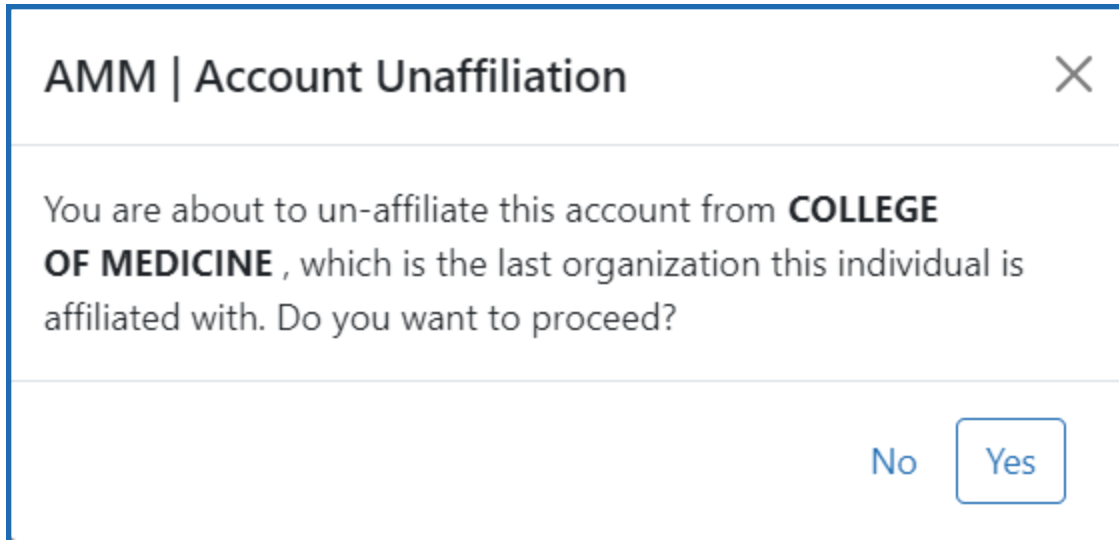


Figure 56: Account Unaffiliation Screen

- Click the **Yes** button to unaffiliate the account, or click **No** to cancel the unaffiliation.

After unaffiliating the account, all roles assigned to the account are removed, the account is placed in 'Pending Affiliation' status, and the **Affiliate** button appears in the *Roles* section of the *Manage Account* screen:

AMM | Manage Accounts | AMM User Reports

Manage Account

Note: Changes to the account are **not saved** until you hit the save button.
- For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.

Required Fields

User Information

Account Status: Active

User Type: Commons

User ID: MOODY16

Primary Organization: STATE UNIVERSITY(5612)

Login via 2FA: OPTIONAL

2FA Exemption Expiration Date: MM/DD/YYYY

2FA Mapping Completion Status: NOT MAPPED

Contact Information

Last Name: Moody | First Name: Alastor | Middle Name:

Email: eRAtest@mail.nih.gov | Confirm Email: eRAtest@mail.nih.gov

Roles

+ Affiliate

Filter Table | 1 Results

Role(s)	Organization(s)	Action
TRAINEE	STATE UNIVERSITY	

Close Save

Figure 57: Affiliate Button in Roles Section on Manage Account Screen

IC Transfer Process

1. The Account Coordinator will unaffiliate the account by removing all roles for their IC.
2. The account will go into 'Pending Affiliation' Status, in which there are no roles associated with the account, and the user cannot perform any functions.
3. An Account Coordinator from the new IC will search for accounts in 'Pending Affiliation' status and select an account to affiliate.

For information on Affiliating an account, see [Affiliate Account](#).

Manage System Accounts

System accounts are used to access eRA [Web Services](#).

Agency and Commons users can manage system accounts in their organizations.

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to the [Web Services Certificate \(S2S\) Guide](#):

- Section 2.4.3 for Commons users

Perform the following steps:

1. To manage a system account, first perform a search to locate the account.
 - a. See Search for System Accounts for more information.
2. On the Search Results screen, click the **Manage** button for the system account you want to manage. The *Manage Account* screen opens.

Manage Account

Note: Changes to the account are **not saved** until you hit the save button.
 - For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.

* Required Fields

User Information

Account Status: Active

User Type *
 System

Primary Organization *
 UNIVERSITY OF HOGWARTS

Certificate Information

Certificate Owner *
 University of Hogwarts

Certificate Provider/Authority CN *
 INCOMMON RSA

Certificate Serial Number *
 2A:218E:2F:73:A6

Contact Information

Last Name *
 Potter

First Name *
 Harry

Middle Name

Email *
 eRAStage@mail.nih.gov

Confirm Email *
 eRAStage@mail.nih.gov

Roles

+ Add Roles + Add Roles to other org. X Remove All

Filter Table 3 Results

Role(s) ^	Organization(s) ⌵	Action
APPLICANT_RETRIEVAL_DATA_SERV	UNIVERSITY OF HOGWARTS	X Remove
SERVICE_PROVIDER_ROLE	ALL	
SVS_APPLICANT_DATA_SERV	UNIVERSITY OF HOGWARTS	

Close Deactivate Save

Figure 58: Manage Account Screen for external accounts

NOTE: Fields that are grayed out are not editable.

3. Edit the available fields as needed.
4. Click the **Add Roles** button to add the roles to the account. See [Add System Roles](#) for more information.
5. To remove a role, click the **Remove** button. To remove all roles, click the **Remove All** button.
6. Click **Deactivate** to deactivate an account. See Deactivate Account for more information.
7. Click **Save** to save the changes or click **Cancel** to cancel. The *Account Details* screen opens and displays a success message.

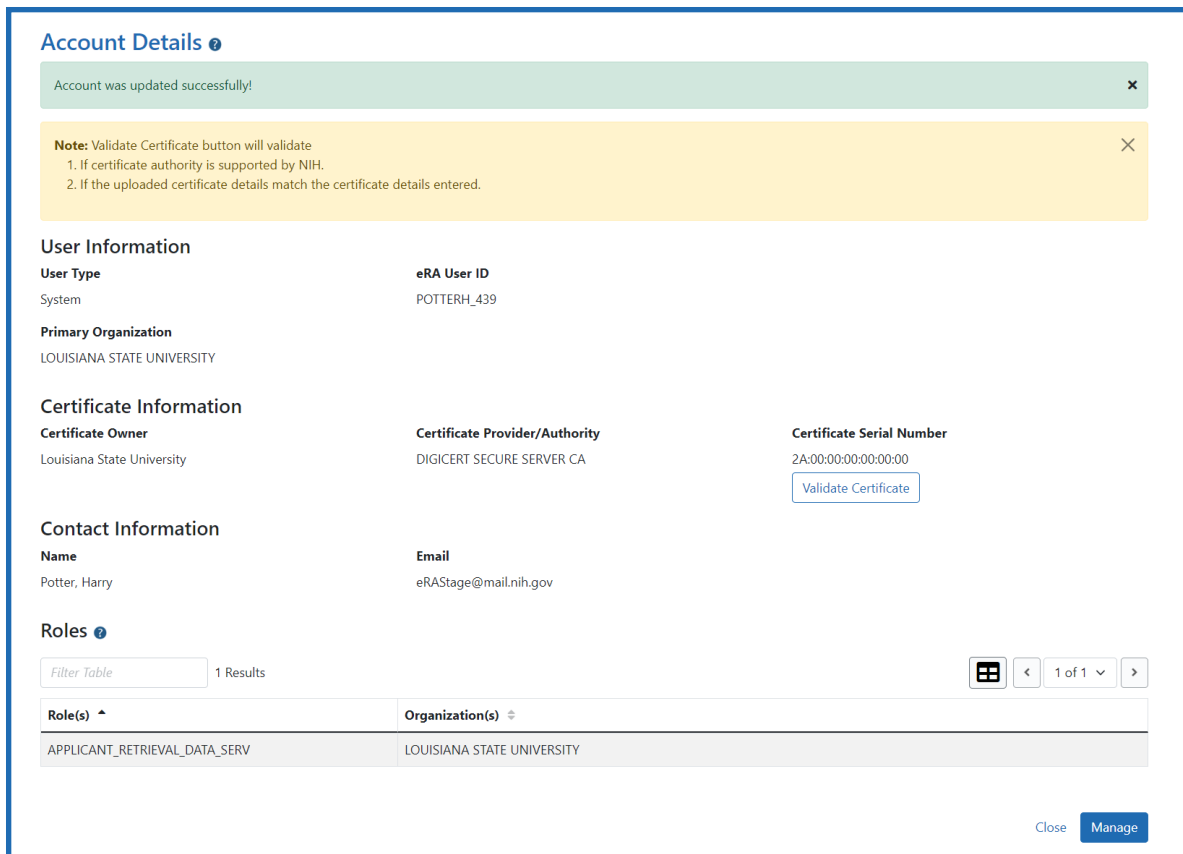


Figure 59: Account Details Screen for external users

- You can perform these additional actions in the *Account Details* screen:
 - If the certificate needs to be validated, click the **Validate Certificate** button. See [Validate Certificate](#) for more information.
 - To return to the *Manage Accounts* screen, click the **Manage** button or the **Go Back** hyperlink.
 - To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

Add System Roles

NOTE: The list of roles is dependent on the logged-in user's role.

- To add system roles to the account, click on the **+ Add Roles** button on the *Create Accounts* or *Manage Accounts* screen.

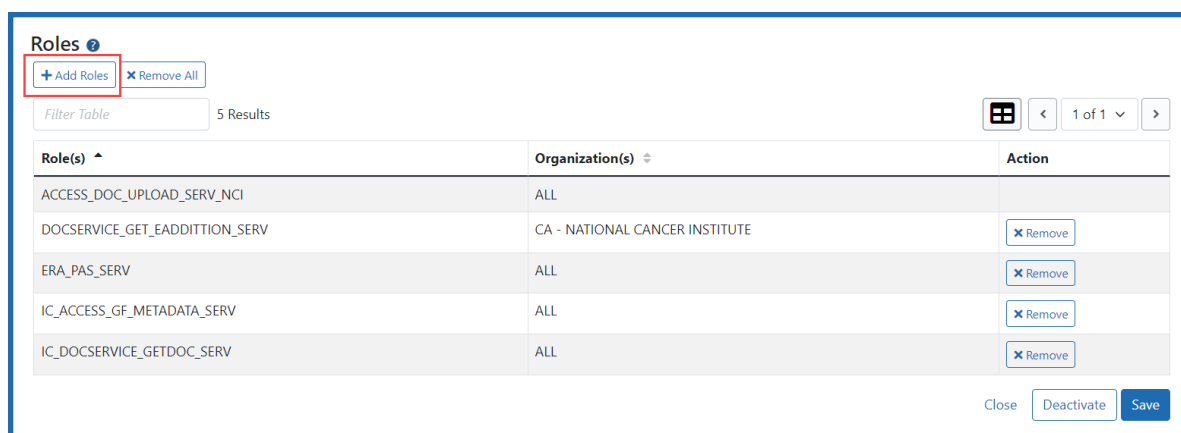


Figure 60: Add Roles Button on the Create Account Screen

Clicking the **+ Add Roles** button displays the *Add Roles* pop-up screen.

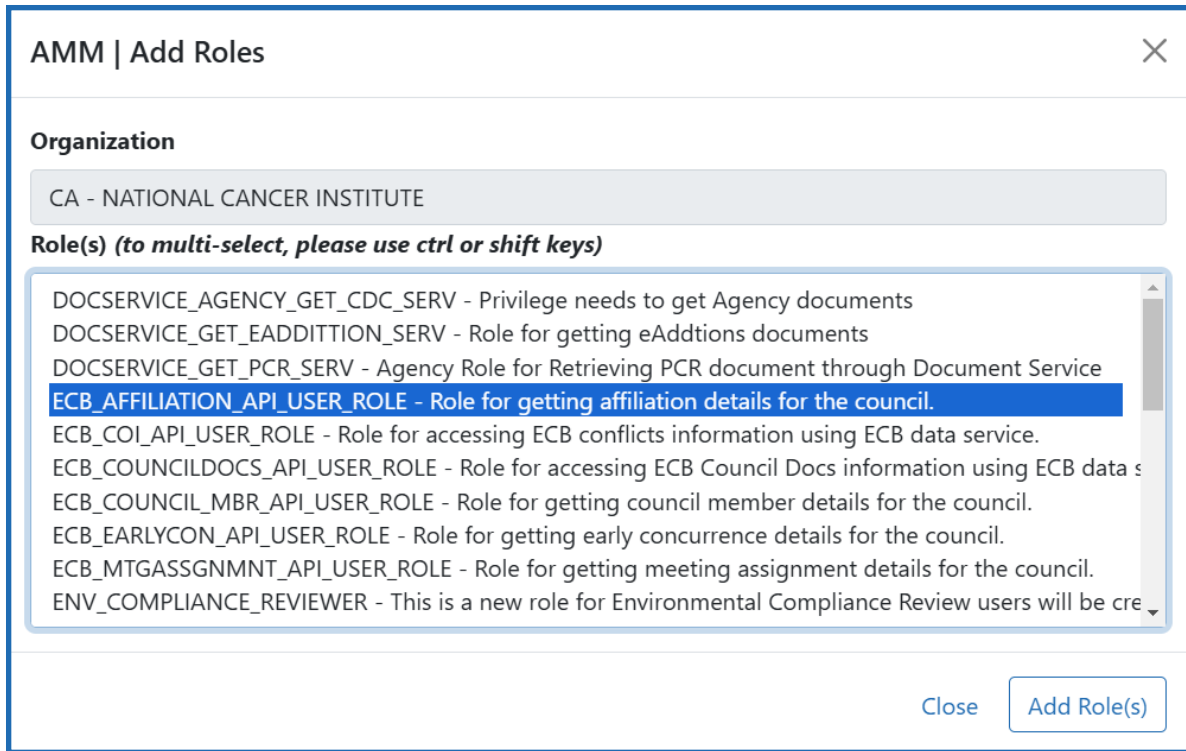


Figure 61: Add Roles Screen Displaying Agency System Roles List

1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

Clicking the **Add Roles(s)** button returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).

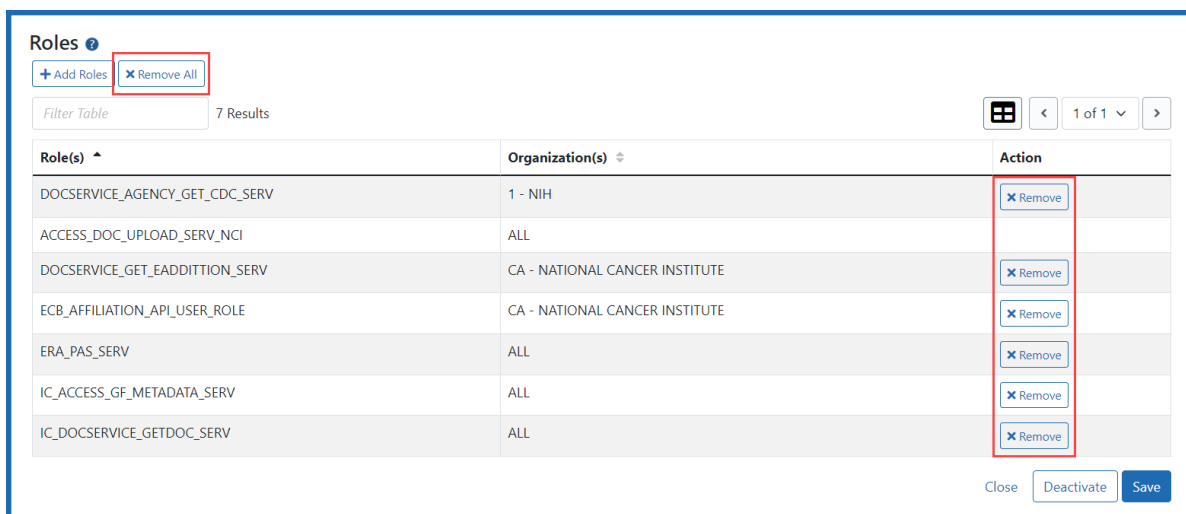


Figure 62: Roles Section on the Create Accounts Screen for Agency Users

3. To add additional roles, click the **+ Add Roles(s)** button. Repeat the steps above.
4. To remove a role click the appropriate **Remove** button in the **Action** column.
5. To remove all roles click the **Remove All** button.

Change Password

1. In the Commons Admin app, select **Change Password** from the *Accounts* tab:

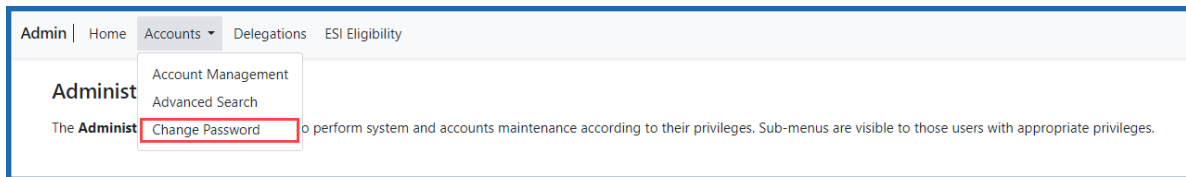


Figure 63: Commons Menu Tabs Displaying the Change Password Tab

The **Change Password** tab displays the *Change Password* screen in a separate browser window.

 A screenshot of the 'Change Password' screen. At the top left, the title 'Change Password' is displayed. Below the title is a light blue information box with a close button (X) in the top right corner. The information box contains the following text:

- The password length must be between 15-64 characters
- Cannot re-use previous 10 generations of passwords
- Allows user selection of long passwords and passphrases, including spaces and all printable characters

 Below the information box are three input fields:

- 'Current Password: *' with a text input field.
- 'New Password: *' with a text input field.
- 'Confirm New Password: *' with a text input field.

 At the bottom right of the form, there are two buttons: 'Clear' and 'Submit'.

Figure 64: Change Password Screen

2. Enter your **Current Password**.
3. Enter a **New Password**.
4. Type your new password a second time in the **Confirm New Password** field.

5. Perform one of the following options:
 - a. Click the **Save** button to save the changes.
 - b. Click the **Clear** button to clear the fields.


Use your new password the next time that you log into Commons.

NOTE: The password guidelines are:

- Password length must be between 15-64 characters
- First and last characters cannot be numbers
- Cannot contain username
- Cannot re-use previous 10 generations of passwords

Reset Password

NOTE: Users are required to reset their passwords after a defined time period. The system locks the account if the user fails to reset the password. Use this procedure to unlock these accounts.

1. To reset a user's account password, open account in the the [Manage Accounts](#) screen and click the **Reset Password** button  located on the lower right side of the screen.
2. A pop-up confirmation screen opens. Click **Close** to close it.

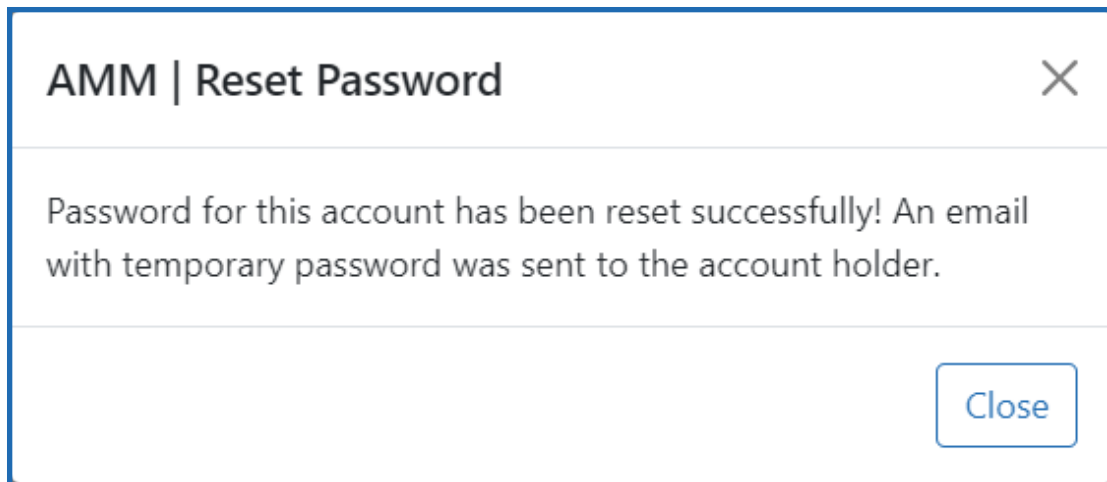


Figure 65: Reset Password confirmation screen

3. When you complete the password reset, an email notification with a temporary password is sent to the account holder.

User Reports

AMM includes the following reports capabilities:

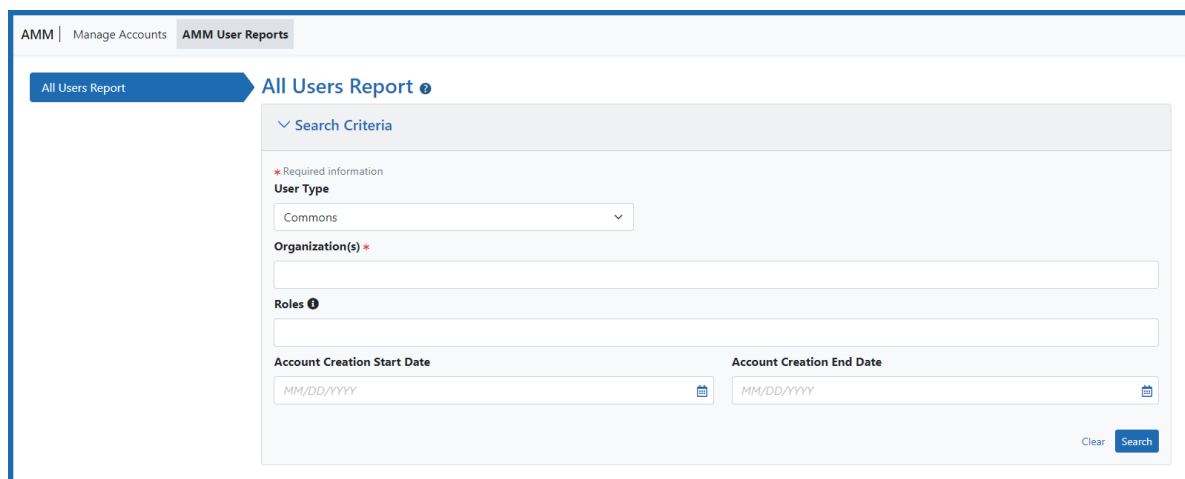
- **All Users Report** — Information on all user accounts in your organization.
- **Inactive Users Report** — Lists user accounts that have been locked due to inactivity. *For internal users only.*
- **Deactivated Users Report** — Lists user accounts that have been deactivated by an administrator. *For internal users only.*
- **Role Description Report for Agency Accounts** — Lists all Agency roles, role descriptions, and associated privileges for any business area. *For internal users only.*
- **Role Description Report for System Accounts** — Lists all System roles, role descriptions, and associated privileges for any business area. *For internal users only.*

To open the reporting functions, click the **AMM User Reports** tab.

The *All Users Report* screen opens. There are two versions of this screen, as shown below. The version you see depends on the organization you belong to.

TIP: To select multiple organizations, roles, or business areas, hold the <Ctrl> key as you click.

All Users Report Screen for External Users



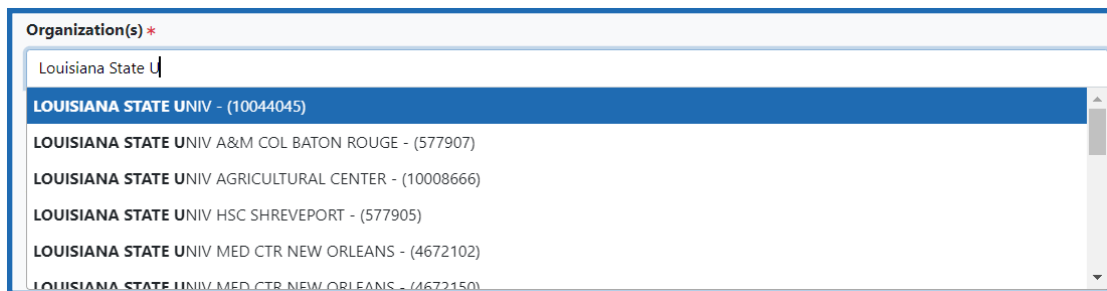
The screenshot displays the 'All Users Report' interface. At the top, there is a breadcrumb trail: 'AMM | Manage Accounts | AMM User Reports'. Below this, a blue arrow points to 'All Users Report'. The main content area is titled 'All Users Report' and contains a 'Search Criteria' section. Under 'Search Criteria', there is a red asterisk indicating required information. The 'User Type' dropdown is set to 'Commons'. The 'Organization(s)' field is empty. The 'Roles' field is also empty. Below these are two date pickers for 'Account Creation Start Date' and 'Account Creation End Date', both showing the format 'MM/DD/YYYY'. At the bottom right, there are 'Clear' and 'Search' buttons.

Figure 66: All Users Report Screen for External Users

Use this screen to run an All Users Report on external users. The **All Users Report** button is selected by default. Follow the steps below to launch the report.

1. Select "Commons" in the **User Type** field and set the search criteria in the other fields as follows:
2. **Organization** — This field displays your organization name. Service Desk agents, to select an organization, begin typing the name or ID number in this field. The live search function displays organization names as you type. When the one you want appears, scroll down and select it.

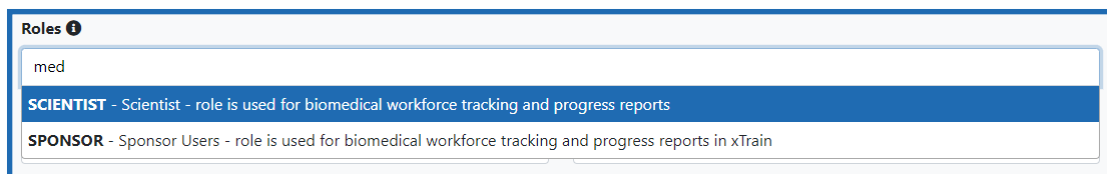
NOTE: This field is mandatory.



The screenshot shows a search interface for the "Organization(s)" field. The input text is "Louisiana State U". A dropdown menu is open, displaying a list of organizations with their IDs. The first item, "LOUISIANA STATE UNIV - (10044045)", is highlighted in blue. Other items include "LOUISIANA STATE UNIV A&M COL BATON ROUGE - (577907)", "LOUISIANA STATE UNIV AGRICULTURAL CENTER - (10008666)", "LOUISIANA STATE UNIV HSC SHREVEPORT - (577905)", "LOUISIANA STATE UNIV MED CTR NEW ORLEANS - (4672102)", and "LOUISIANA STATE UNIV MED CTR NEW ORLEANS - (4672150)".

Figure 67: Organization field, external

3. **Roles** — Leave this field blank to report all user roles. To limit the report to one or more user roles, click this field to open the drop-down menu or begin typing the name of a role. The live search function displays roles as you type. When the one you want appears, scroll down and click to select it.



The screenshot shows a search interface for the "Roles" field. The input text is "med". A dropdown menu is open, displaying a list of roles. The first item, "SCIENTIST - Scientist - role is used for biomedical workforce tracking and progress reports", is highlighted in blue. The second item is "SPONSOR - Sponsor Users - role is used for biomedical workforce tracking and progress reports in xTrain".

Figure 68: Roles drop-down menu

4. **Account Creation Start Date/End Date** — Leave these fields blank to report all time periods. To limit the report to a certain time period, enter a start date, end

date, or start and end dates. Enter dates in MM/DD/YYYY format or click the calendar icon to select them from the calendar.

5. When you finish entering search criteria, click **Search** to run the report.

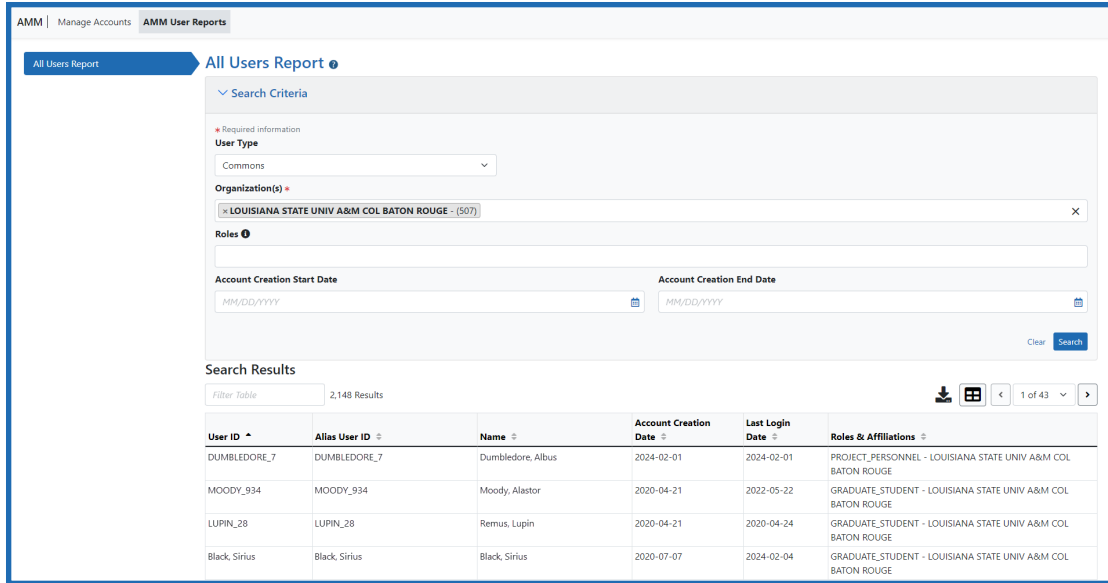


Figure 69: All Users Report output

Figure 70: All Users Report Screen for Internal Users

Figure 71: Organization field, internal

Figure 72: Business Area field

Figure 73: Roles field

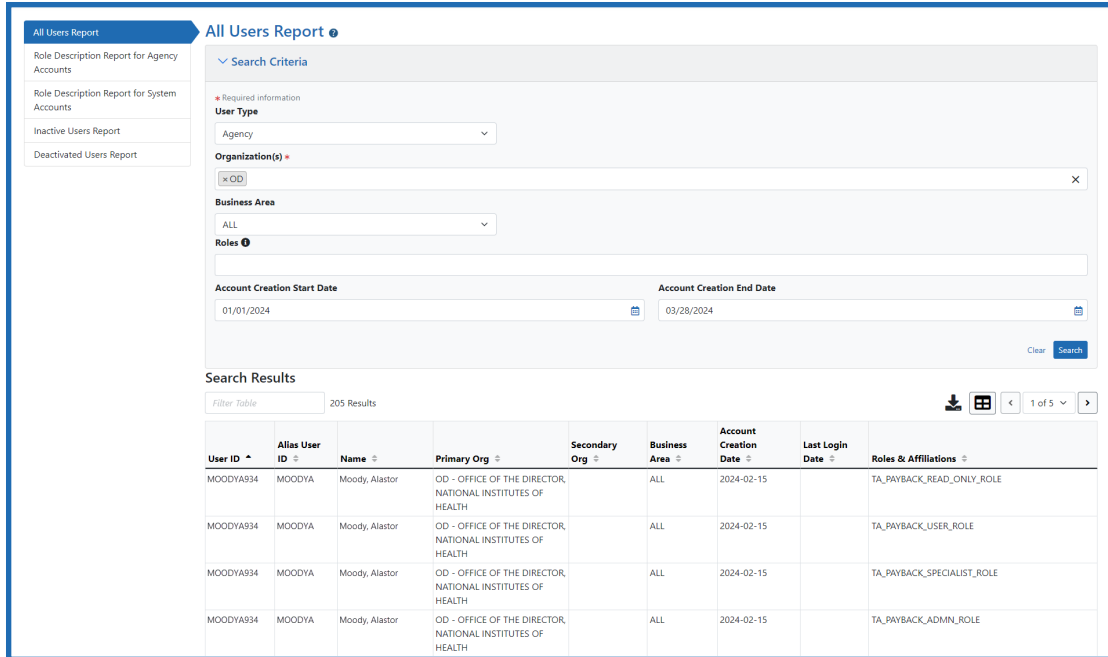


Figure 74: All Users Report output for internal users

Navigating Report Outputs

These tips for browsing, filtering and exporting the report output apply to all report types. Report output displays include several control options:

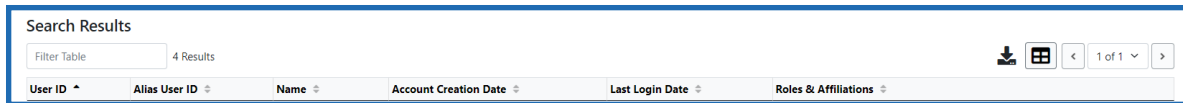
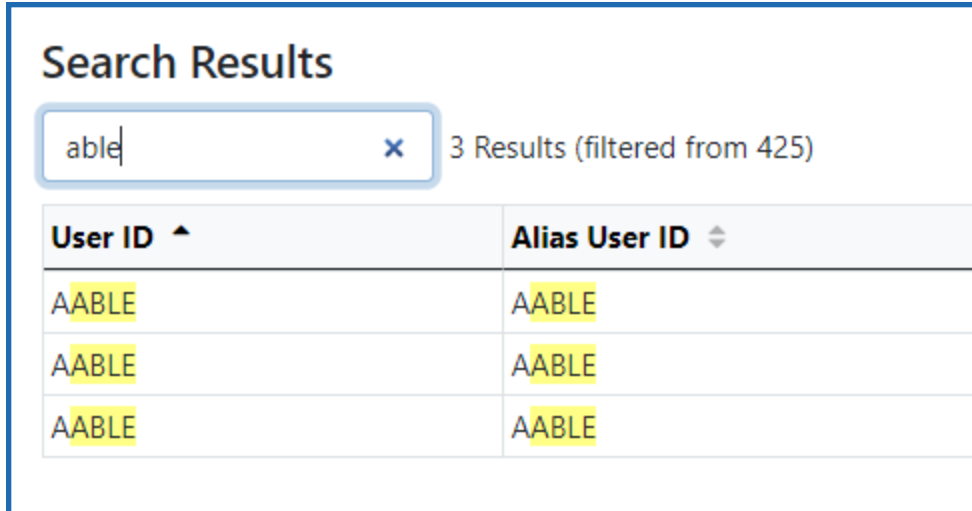


Figure 75: Report output controls

- To filter the report, type some text in the **Filter** field, such as a name. Only rows that contain the filter term display, and all instances of the filter text are highlighted in yellow:



Search Results

able × 3 Results (filtered from 425)

User ID ▲	Alias User ID ◆
AABLE	AABLE
AABLE	AABLE
AABLE	AABLE

Figure 76: Filter results

- To adjust the number of records displayed, select a number in the **Show per page** drop-down menu.
- To navigate the report pages, click a **Page Number** or use the left and right arrow buttons.
- To re-sort the report columns in ascending or descending order, click the up/down arrows in the column headers.
- To export the report output as an Excel spreadsheet or PDF, click the appropriate **Export** button:

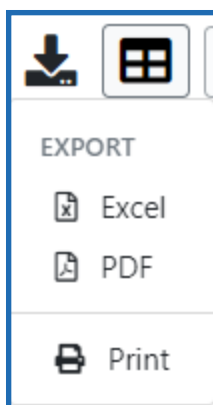


Figure 77: Export button

- **Excel** — When you click this button, an open-or-save dialog opens.
- Click **Open** to open the report data in Excel. A new Excel window opens. Click the **Enable Editing** button in the yellow bar at the top of the worksheet to work with the data.



Figure 78: Open-or-save dialog

- **PDF** — Click this button to save the report as a PDF file. A save dialog opens. Choose a location and save the file.