User Guide

# Account Management Module (AMM) User Guide for State Department 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.

# Table of Contents

# 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

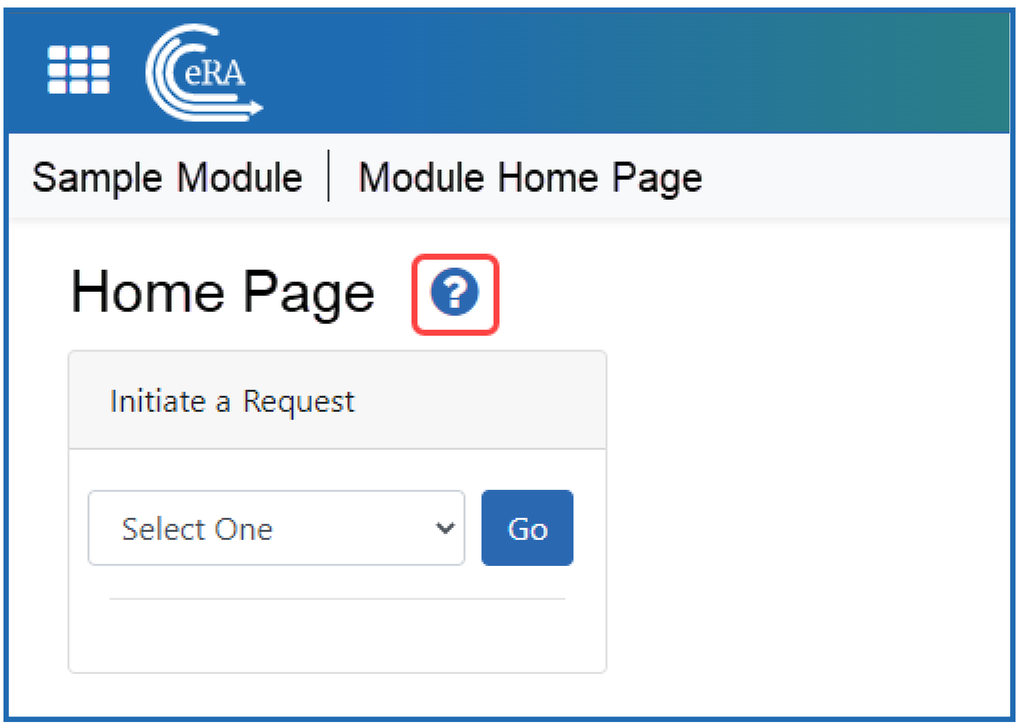
- Account Management has been rebranded as Account Management Module (AMM) to distinguish it from the HHS Access Management System (AMS), and the online help has been updated to reflect this change.

# Welcome to Account Management Module (AMM) Online Help

This help system provides online information about the functionality of the Account Management Module (AMM) module. This topic illustrates the use of this online help system.

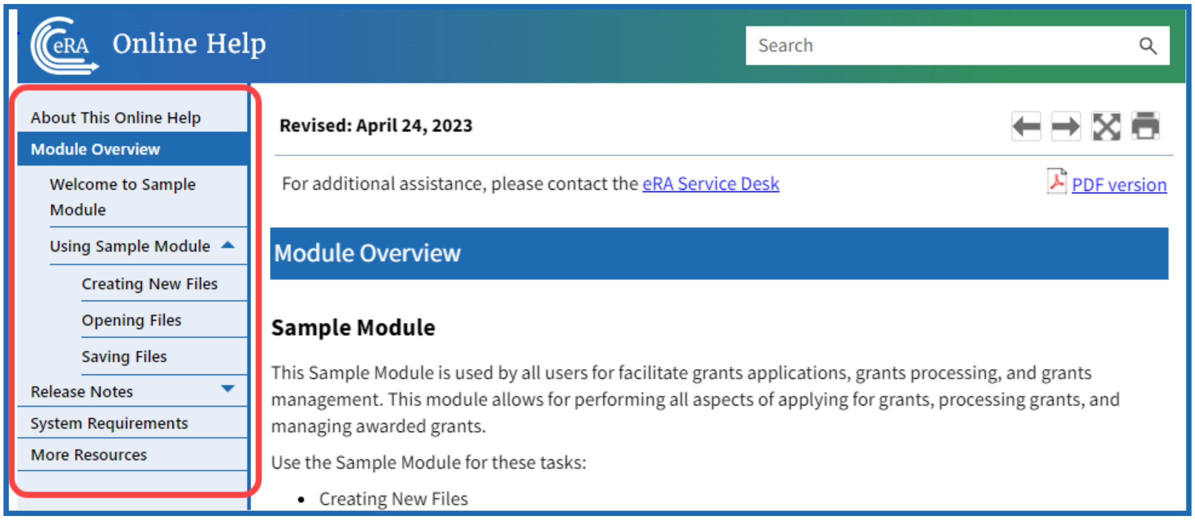
## Help Icon in Module Leads to Online Help

Access online help by clicking the Help icon, which is a blue circle containing a white question mark, from any screen within the Account Management Module (AMM) module.

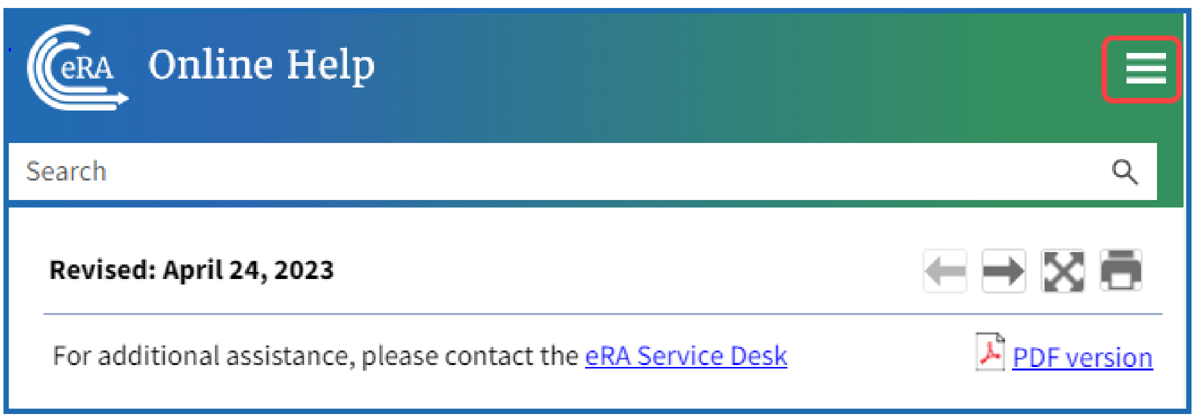



## Table of Contents Pane

Use the table of contents pane at the left of a help system to navigate through topics. If a topic name has a down arrow next to it, click it to reveal subheadings.

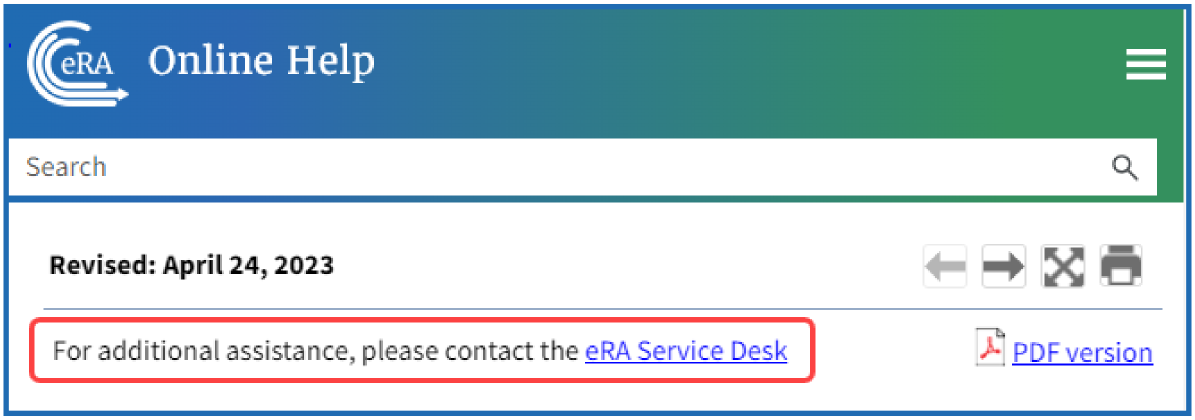



When the browser window is narrow, the table of contents pane is hidden. To view a hidden table of contents, click the three-horizontal-line icon at right top to toggle the table of contents between onscreen and hidden.



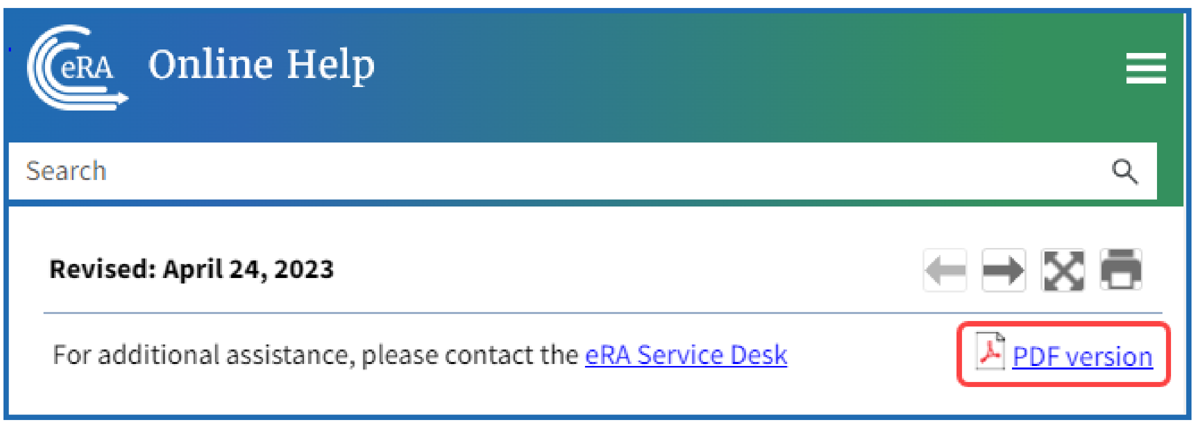

## Contacting the eRA Service Desk

Online help pages contain a link to the eRA Service Desk at top. Contact the service desk for help with error messages, system questions, and help solving problems in eRA modules. The link is located above the page title on all online help pages.




## Viewing all Online Help in a PDF Version

All online help is available in PDF format. The PDF contains identical information as the online help. The PDF is linked at the top right of every online help page with a link named PDF Version.




## Showing Hidden Text or Images

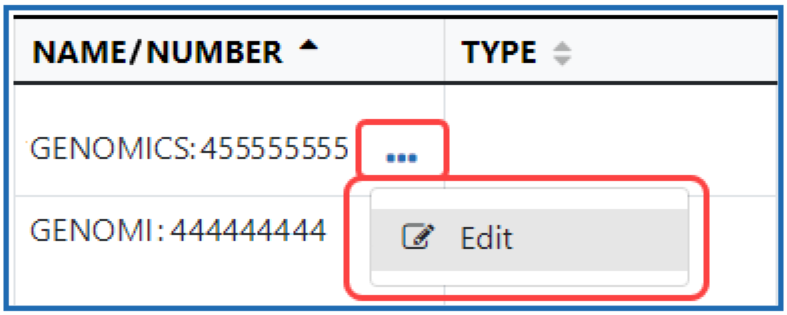
You might encounter dropdown text or toggled images in online help. Sometimes, to save screen space and let you focus on the information important to you, online help hides text or images behind linked text.

For instance, click the following heading to see the hidden dropdown text showing steps of a procedure:

Creating a New File

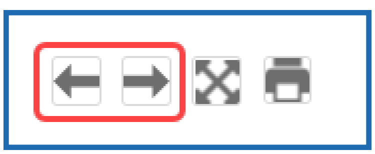
1. Click the New button.
2. Enter a name for the file.
3. Click the Save button.

Images can also be toggled. In the example below, click the words "Access the Edit action by clicking the three-dot ellipsis icon" to see the hidden image.



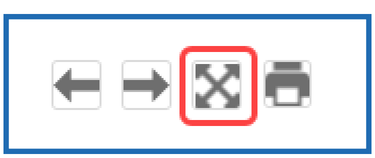

## Tools for Navigating Topics, Showing Hidden Material, and Printing

Click the left and right arrow icons at top right to go to the previous or next topic in the table of contents:

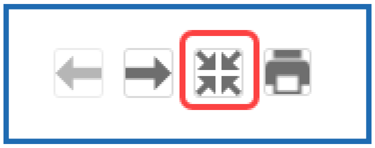


Click the print icon, below, to print:

Click the expand icon, below, to expand all material that is hidden in a topic.



Click the collapse icon, below, to collapse all material. The collapse icon appears only after clicking the expand icon.



## Search Field

Type text into the search field to find all topics that contain matching text. Then either press the Enter key or click the magnifying glass icon to search.


If you type multiple words in the search field, the search assumes an 'AND' between each word. For example, if you search for ***system requirements***, the search does this: Find all topics that contain both ***system* AND *requirements***, not necessarily adjacent to each other in text. It counts variations of words as a match; for example; ***require*** or ***required*** are deemed to be matches for ***requirements***.

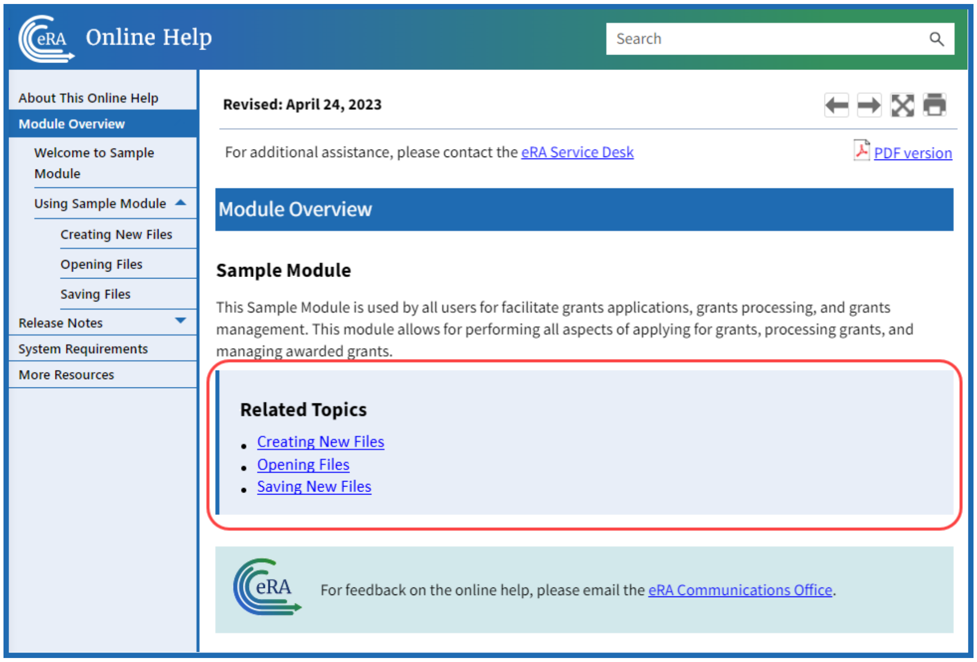
If you want only topics that contain an exact phrase, enclose it in double quotation marks like this:

"system requirements"

The search field searches ONLY the current help system for the Account Management Module (AMM) module. To search all help systems, go to [the eRA website] and use the search field at the top of the page.

## Finding Related Topics

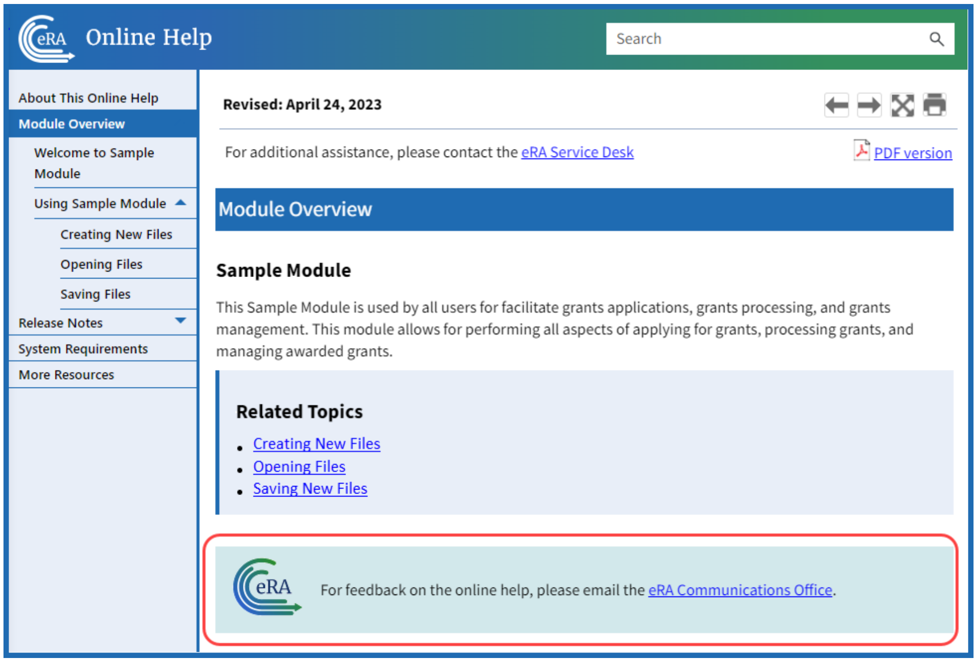
Most topics contain a Related Topics section, which show links to a list of topics that are related to the one you are viewing.




## Providing Feedback on the Online Help or PDF

All topics contain a green feedback footer with an email link to the eRA Communications Office, which creates and updates online help and PDFs. The eRA Communication Office does not provide technical support but is happy to accept feedback on how we might make the online help better meet your needs.

For tech support, contact the eRA Service Desk instead of the Communication Office.


Online Help
Search
About This Online Help
Module Overview
Welcome to Sample Module
Using Sample Module
Creating New Files
Opening Files
Saving Files
Release Notes
System Requirements
More Resources
Revised: April 24, 2023
For additional assistance, please contact the eRA Service Desk
PDF version
Module Overview
Sample Module
This Sample Module is used by all users for facilitate grants applications, grants processing, and grants management. This module allows for performing all aspects of applying for grants, processing grants, and managing awarded grants.
Related Topics
Creating New Files
Opening Files
Saving New Files
For feedback on the online help, please email the eRA Communications Office.

# Accessing AMM

## State Department Staff

The only **User Type** available is *State*.

1. State Department staff can access AMM at this address: https://public.era.nih.gov/ams.
2. The *Commons Login* screen opens.
3. Enter your **User Name** and **Password**.
4. Click the **Login** button.

Upon successful login, the*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.

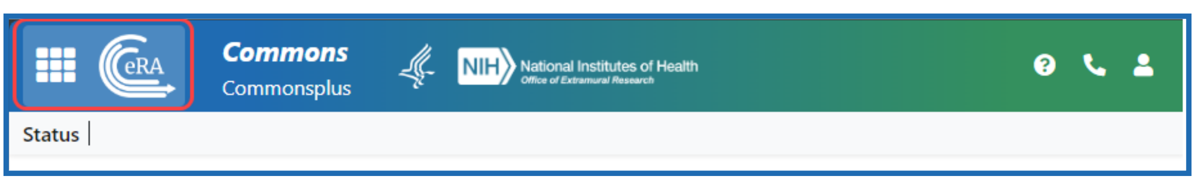


*Figure 1: Full eRA Header with Main Menu at left, which displays module navigation, outlined*

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

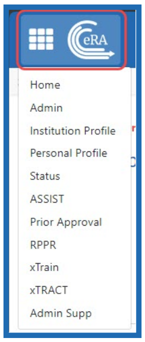
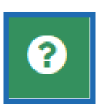



*Figure 2: Expanded Main Menu, showing all modules to which you have access*

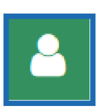
## Other Icons in Header

 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:

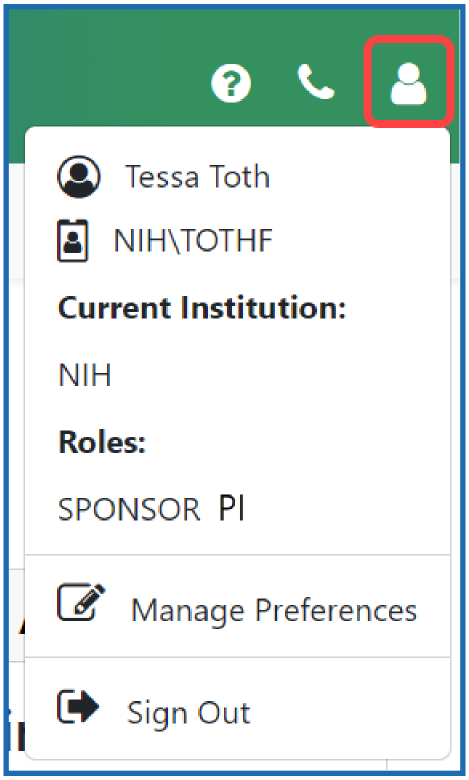



*Figure 3: Person icon menu, showing name, user ID, instituion, roles, and sign out link*

### 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.

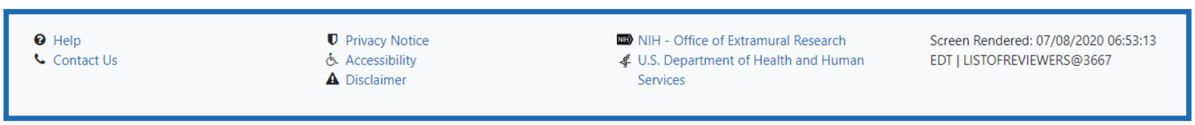



*Figure 6: eRA Footer*

## Navigating Within a Module

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

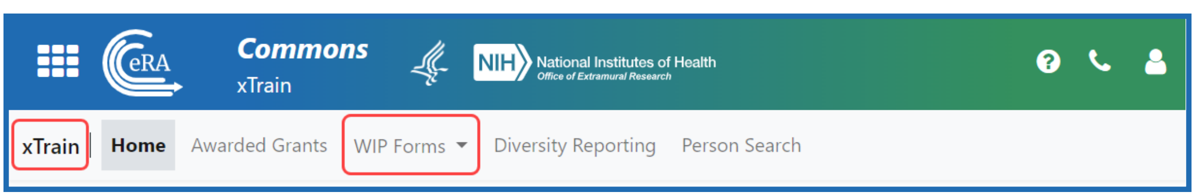


*Figure 7: Navigation within a module, showing module name at left and module pages in navigation along top under banner*

The sections of the modules are listed across the top, with the current section high-lighted 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.

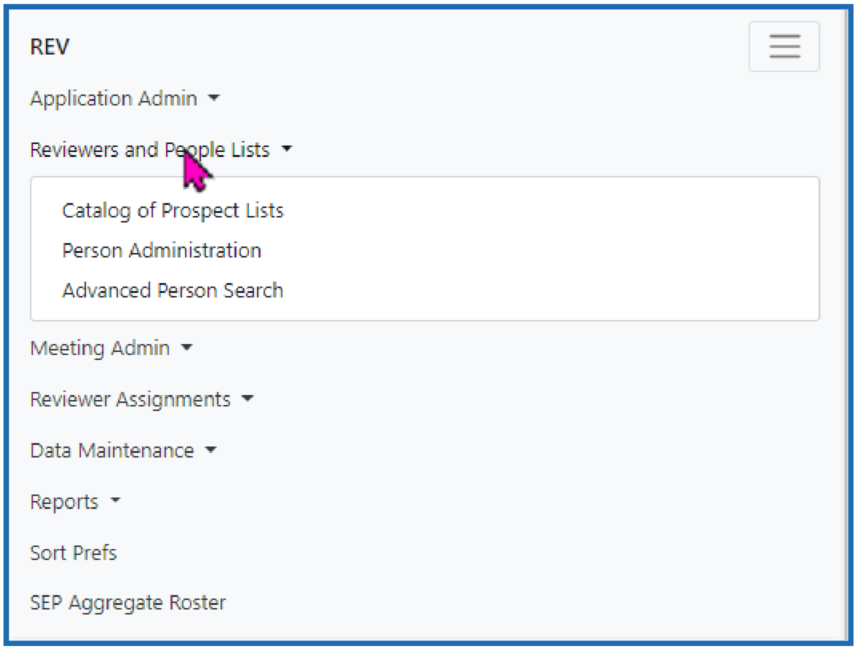



*Figure 10: Module navigation expanded, when screen is narrow and all top navigation is under bento box icon at right*

## 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.

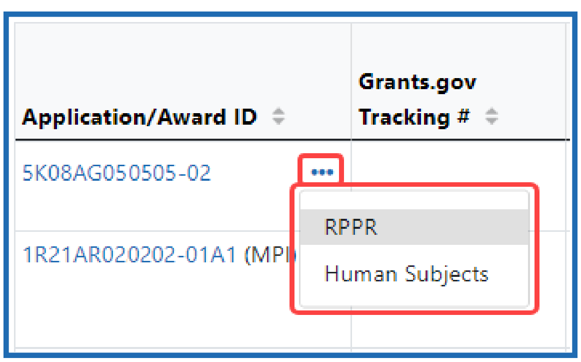



*Figure 11: Three-dot ellipsis menu replaces action menu and displays actions that can be taken on a record in a table*

# Standard Tools for Tables

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

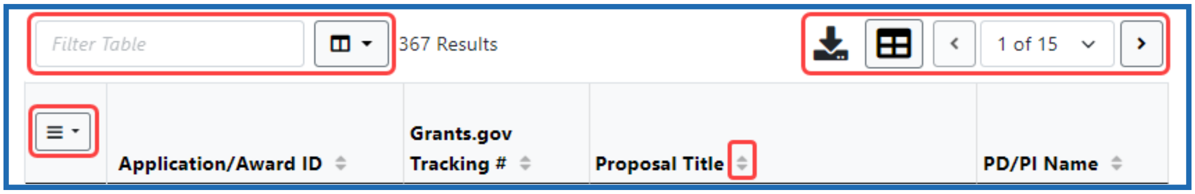



*Figure 12: Section of a table header showing standard table tools shown outlined*

## 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).

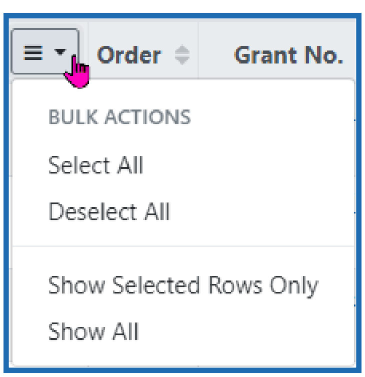



*Figure 14: Bulk Actions Tool Lets you Show/Hide and Select/Unselect Rows*

### 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.

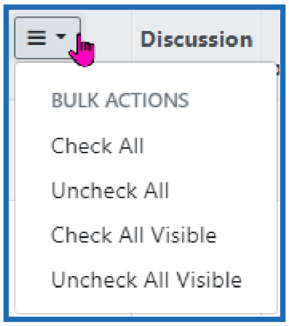
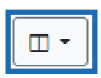



*Figure 15: Bulk select tool example*

### 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.

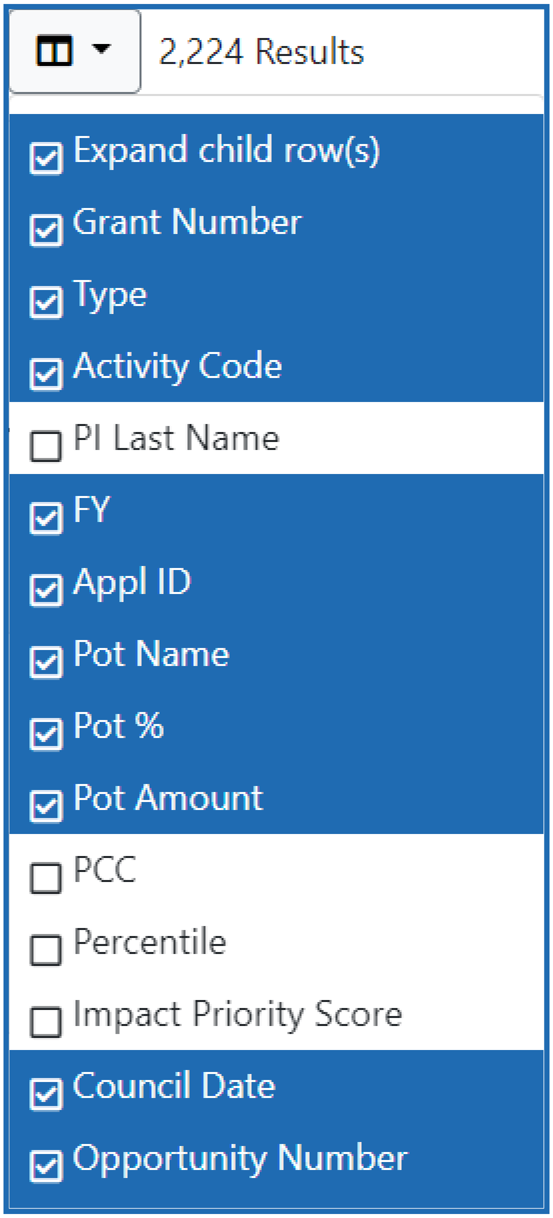



*Figure 16: Expanded Column Picker, which lets you choose which columns are visible*

### Column Sorting

Click column headers to sort by that column.

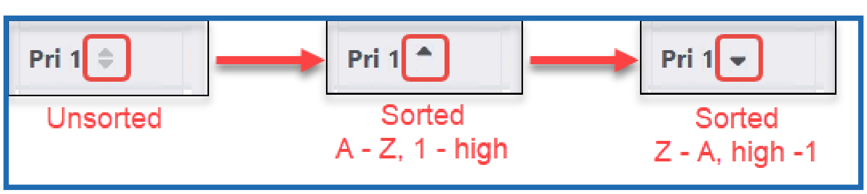


*Figure 17: Sort indicators in table columns*

### 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.

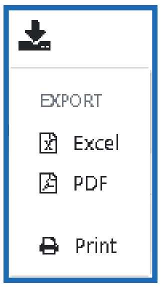
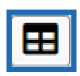



*Figure 18: Download Tool lets you print or export to Excel or PDF*

### Rows Per Page

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

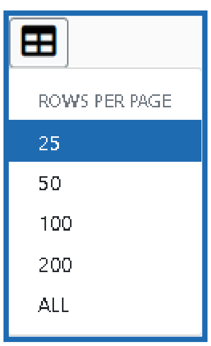



*Figure 19: Grid Tool lets you choose number of rows displayed per page*

### 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:

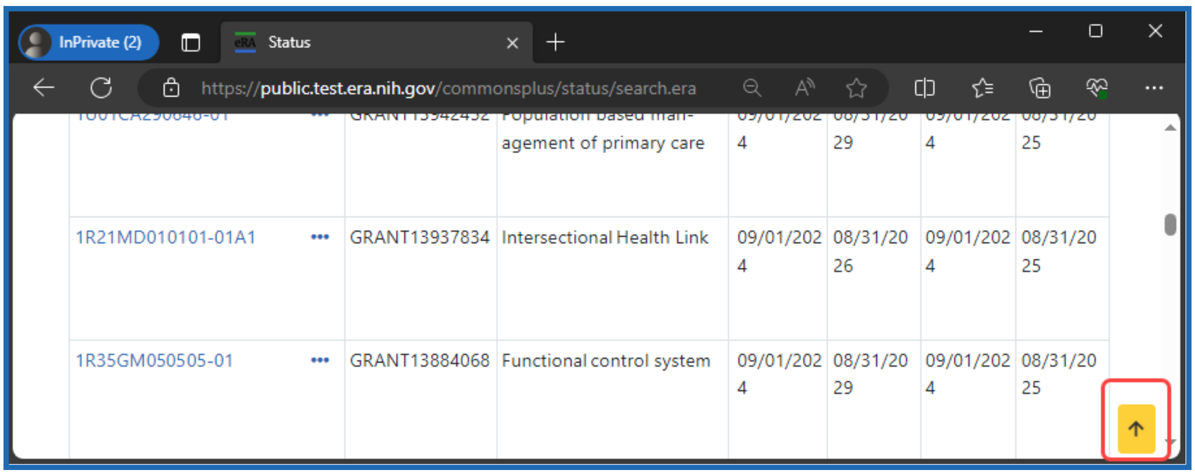



*Figure 21: Yellow "back to top" button with up arrow in yellow rectangle, used to instantly scroll to the top of search results*

## 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.

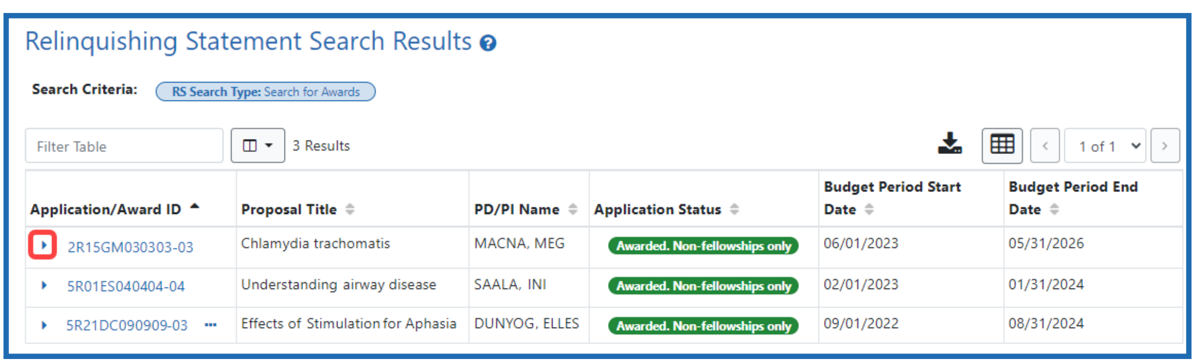


*Figure 22: Triangle shown at beginning of table row indicates that there is hidden information for the row*

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

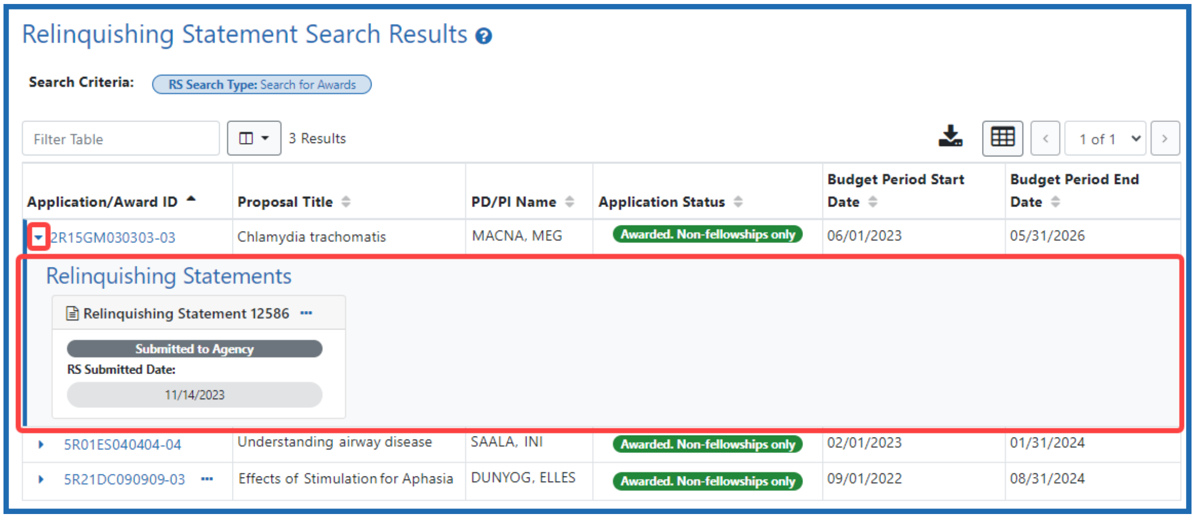



*Figure 23: Click the triangle at the beginning of a table row to show more information about the record*

# 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.

State Department staff have the ability to search, create, maintain, and view user accounts only.

Authorized users can:

- Create new user accounts.
  - The Username and password must comply with Standard eRA policy guidelines.
  - All temporary passwords are system generated.
- Manage existing user accounts.
- Manage role(s) on user accounts.
- Affiliate an account with an Organization, Agency, or Institute/Center (IC).
- Reset passwords on existing accounts.
  - **NOTE**: All passwords are system generated.

## 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:

### State Department

- FACTS State Department Clearance Manager (FACTS SDC MGR role)

## 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 State Department User Accounts

The *Search Accounts* screen for State Department users provides the ability to search for existing user accounts.

**NOTE:** For State Department users the **Search within my organization** check box is automatically checked and the only **User Type** is *State*.

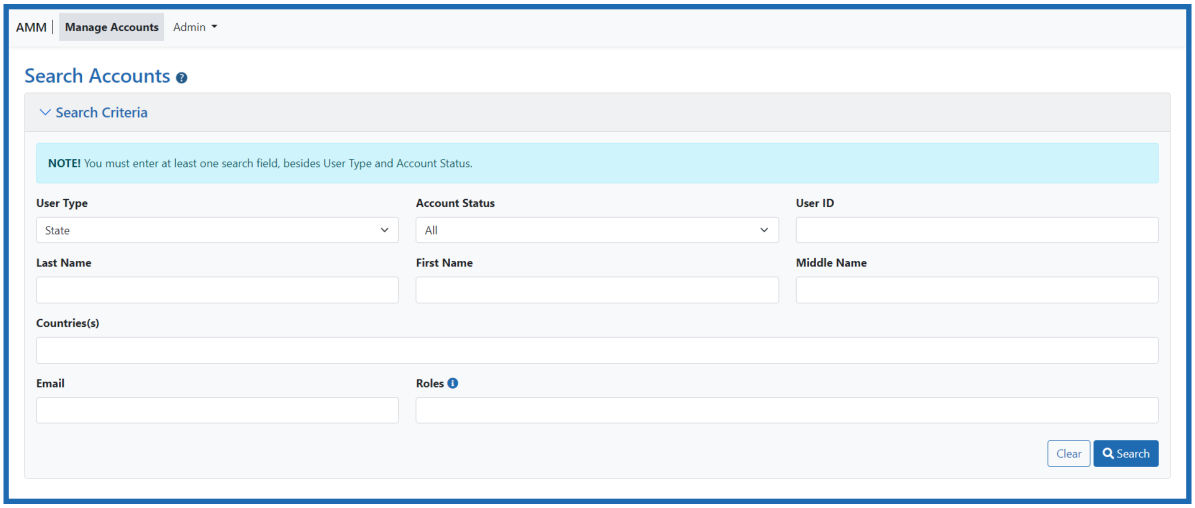



*Figure 24: Search Accounts Screen for State Department Users*

**NOTE:** You must enter at least one search field. Wild card characters such as the percent sign (%) can be used to search for a string of characters.

1. Enter the appropriate search criteria in at least one of the other search fields.
2. Perform one of the following options:
    a. Click the **Search** button to execute the search.
        i. Please refer to the State Department User Account Search Results topic.
    b. Click the **Clear** button to clear the search criteria.

## State Department User Account Search Results

When the **Search** button is clicked, the system displays appropriate user accounts in the **Search Results** located below the *Search Criteria* section on the *Search Accounts* screen. The search results are sorted alphabetically first by last name, first name in the **Name** field and then by **Account Status**.

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

The following columns appear in the search results:

- **User ID**
- **Name** - Last name, First name
- **Email**
- **Account Status** -
  - *Active* - The **Manage** button displays in the **Action** column.
  - *Pending Affiliation* - The **Manage** button displays in the **Action** column.
- **Roles & Affiliations** - FACTS SDC MGR ROLE only.
- **Login via Login.gov** - indicates whether two-factor authentication via Login.gov is required or optional for a user.
- **Certificate Owner** - for System Accounts only.

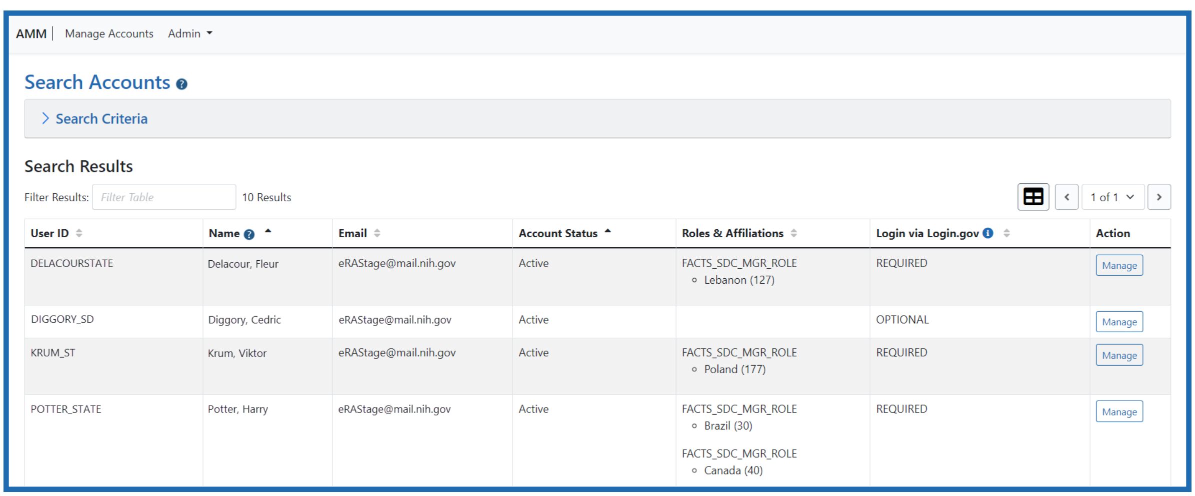



*Figure 25: Search Accounts Screen Displaying State Department Search Results*

## Working with the Search Results

1. To view the **Search Criteria**, click anywhere in the **Search Criteria** bar.
2. To filter the search results, enter a value in the **Filter Table** text box. The matching results update automatically.
   a. Example: to view all users with the word *Ann* in the **Name** or **User ID**, type *ANN* in the filter field.

**NOTE:** The default number of records per page is 10.

3. To change the number of records per page, select the appropriate number in the **Show per page** column.
4. 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.
5. To sort the search results, click the 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).
6. If displayed, click the **Read More** hyperlink in the **Roles and Affiliations** column to view a Principal Investigator's (PI) multiple affiliations.
7. Actions Options
8. To return to the top of the screen, click the **Back to top** hyperlink.

## Action Options

- **Create Account**
  - Click the **Create New Account** button and select **Create State Account** from the dropdown.


*Figure 26: Create New Account button*

- Refer to the Create State Department User Accounts topic for more information.

- **Manage Account**
  - The **Manage** button appears in the Action column for an account if the account status is *Active* or *Pending Affiliation*.


*Figure 27: Search Accounts screen with Manage button*

  - Click the **Manage** button to open the *Manage Account* screen.
  - See Manage State Department User Accounts for more information.

# Create State Department User Accounts

1. To create an account, first perform a search to verify that a State Department account does not already for the user.
    a. For instructions see Search Account for State Department Users.

Click the **Create New Account** button on the *Search Accounts* screen to open the *Create Account* screen.

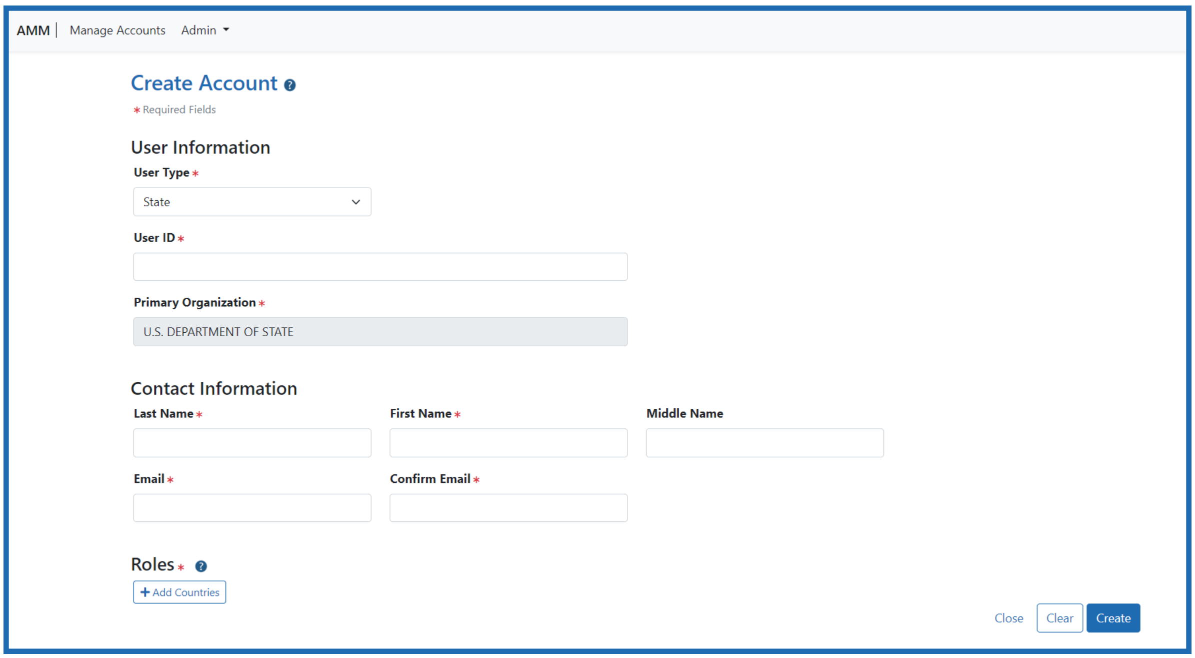



*Figure 28: Create Account Screen for State Department Users*

Perform the following steps:

2. The **User Type** is State.
3. 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.
4. To add countries, click the **+ Add Countries** button.
   a. Please refer to the Add Countries topic for more information.
5. Perform one of the following options:
   a. When the account information is complete, click the **Create** button.
   b. Click the **Clear** button to clear the data entered in the fields.

When the **Create** button is clicked, the system displays the following message on the *Account Details* screen: *Account created successfully*.

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 State Department User Accounts topic.
   c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

## 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.

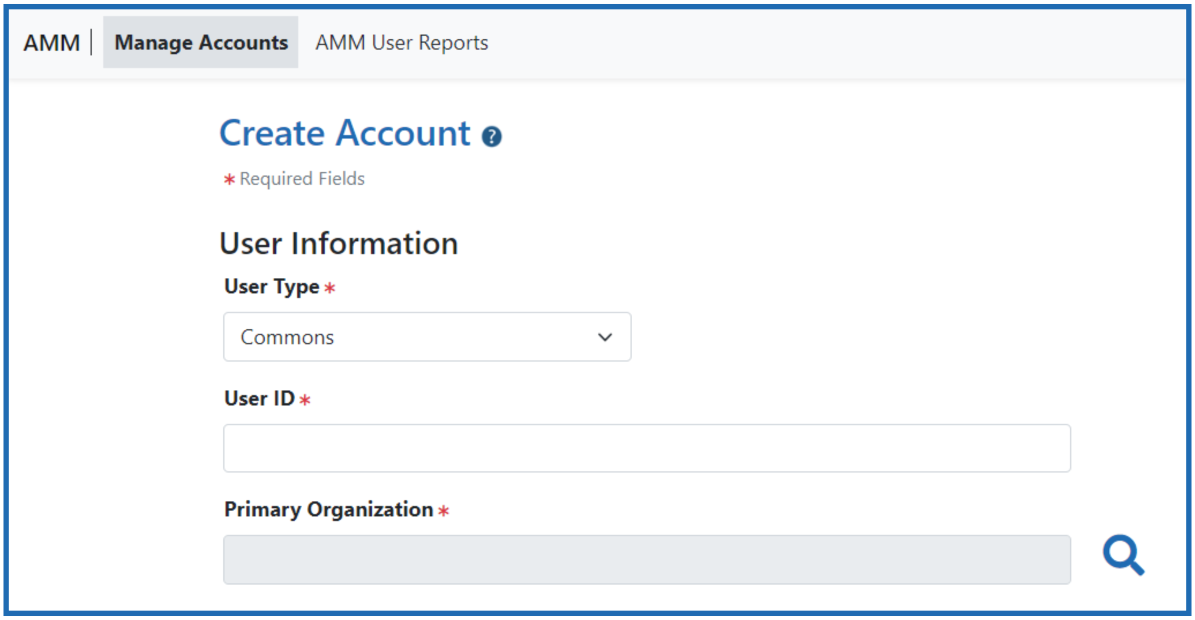



*Figure 29: Primary Organization Field*

1. Click the **magnifying glass** icon on the *Create Account* screen to open the *Search Organization and Add Roles* and add a primary orgnization.
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.

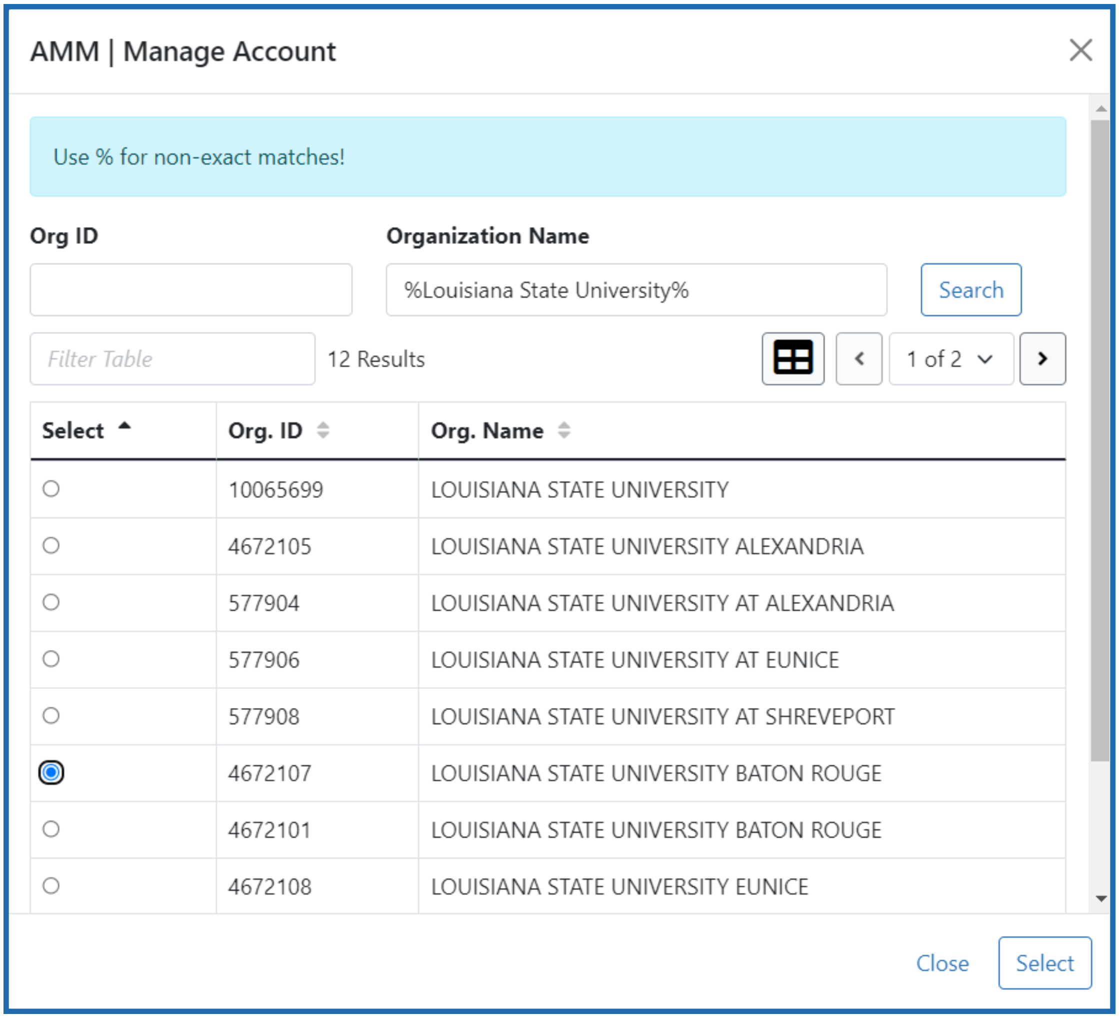



*Figure 30: Search Organization and Add Roles Screen*

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.

# Manage Accounts

## User Accounts

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

- Manage State Department User Accounts

# Manage State Department User Accounts

1. Perform one of the following steps to edit an account:
    a. Click the appropriate **Manage** button in the **Action** column on the *Search Accounts* or *Annual Recertification* screens.
    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:

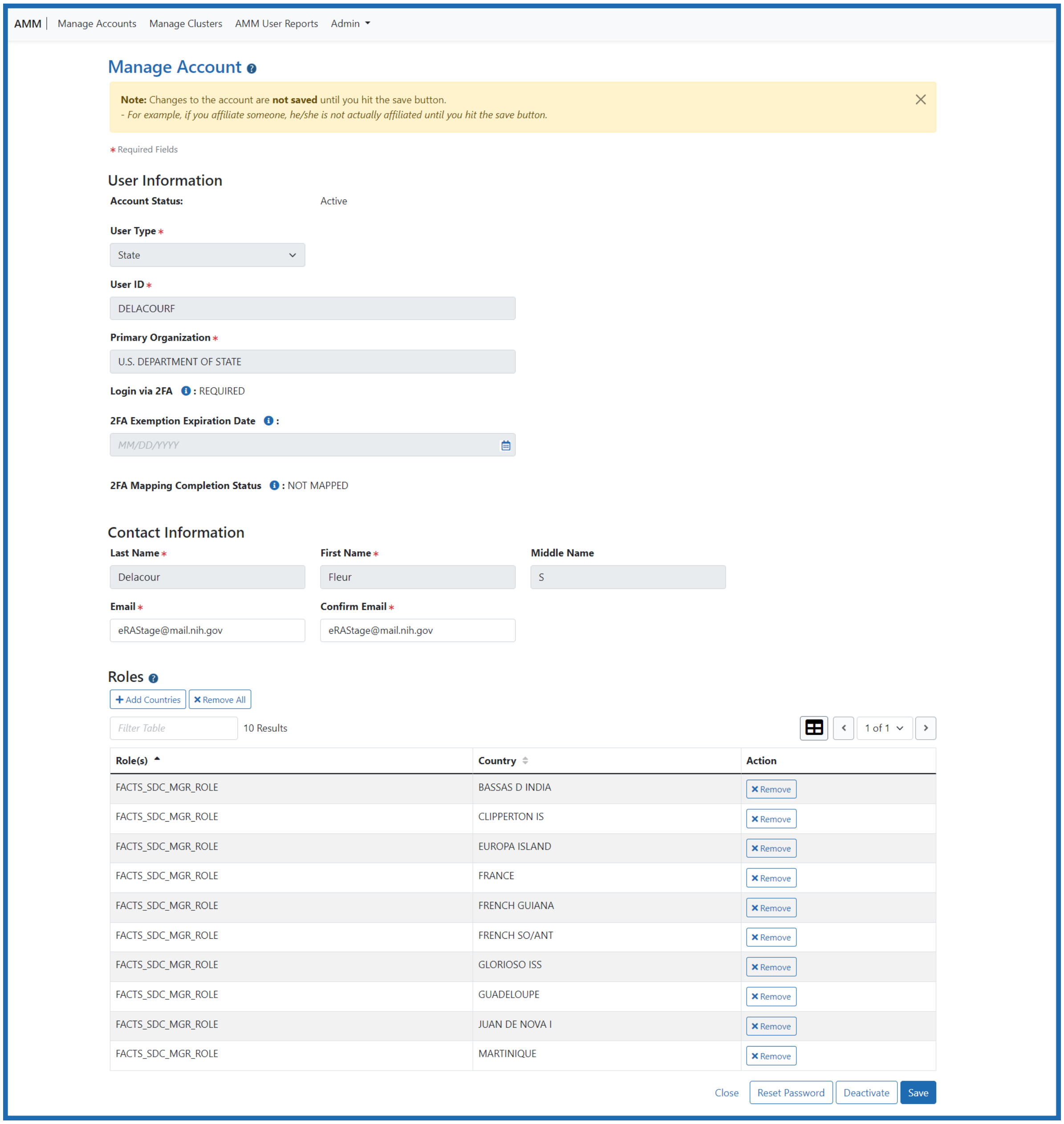



*Figure 31: Manage Account Screen for State Department Users*

**NOTE:** Fields that are grayed out are not editable.

Perform one or more of the following steps:

1. Edit the **Email** addresses, if necessary.
2. Click the **+ Add Countries** button to add countries.
    a. For more information, please refer to the Add/Delete Countries topic.
3. Click the **Remove** button to remove a country from the list in the *Roles* section.
4. Click the **Reset Password** button to reset the user's password.
    a. Please refer the Reset Password topic for more information.
5. Perform one of the following options:
    a. Click the **Save** button to save the changes.
    b. Click the **Cancel** button to return to the *Account Details* screen.

Clicking the **Save** button opens the Account Details screen with the message: *Account was updated successfully!*

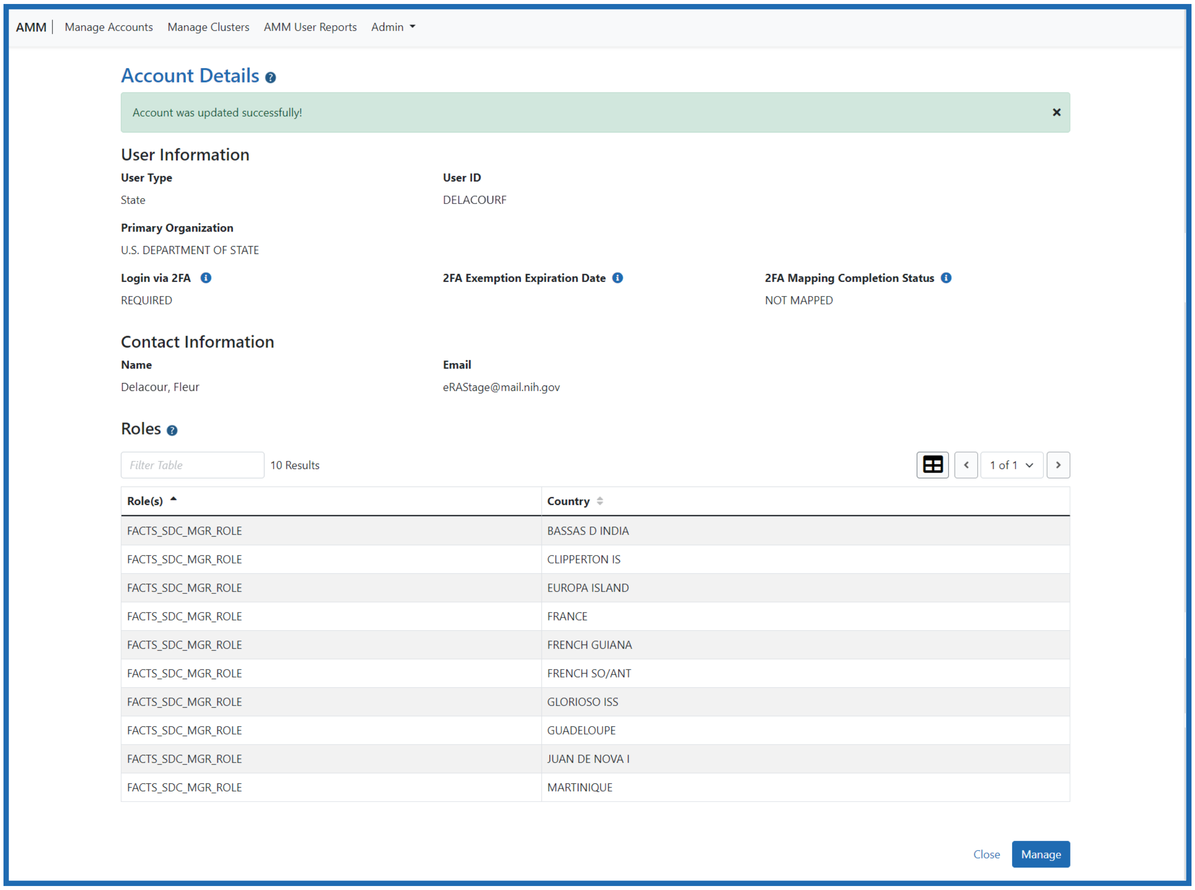



*Figure 32: Account Details screen with success confirmation message*

To edit the account's information, click the **Manage** button.

### 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.

## Reactivate/Unlock Account

**IMPORTANT:** The Reactivate/Unlock Account feature is not currently available to Commons Account Coordinators.

**NOTE:** Users with the Account Administrator (AA) role can reactivate accounts that have been deactivated by an administrator or automatically locked due to inactivity.

On the *Search Results* or *Account Details* screens, click **Manage** to open the *Manage Account* screen. If an account is deactivated, a **Reactivate** button 

displays at the bottom of the *Manage Account* screen. Click this button to proceed.

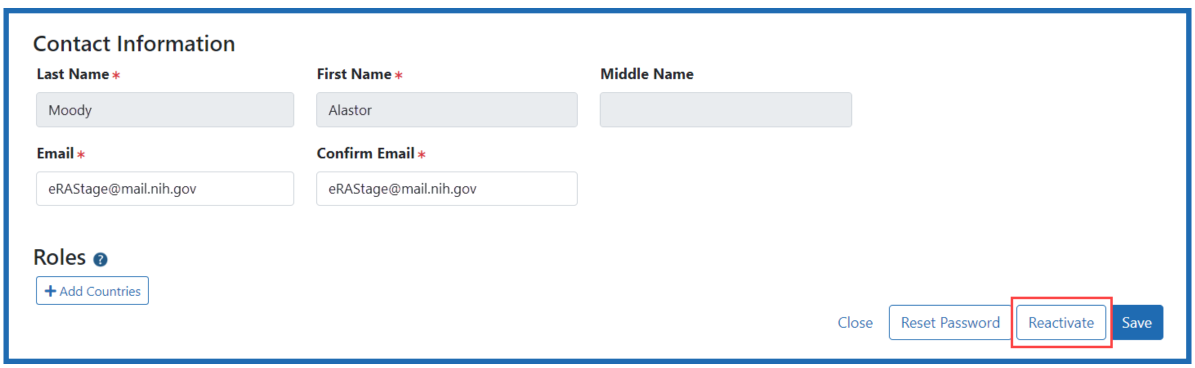



*Figure 33: Reactivate button at the bottom of the Manage Account screen*

2.a If an account is locked due to inactivity, an **Unlock** button displays at the bottom of the *Manage Account* screen. Click this button to proceed.

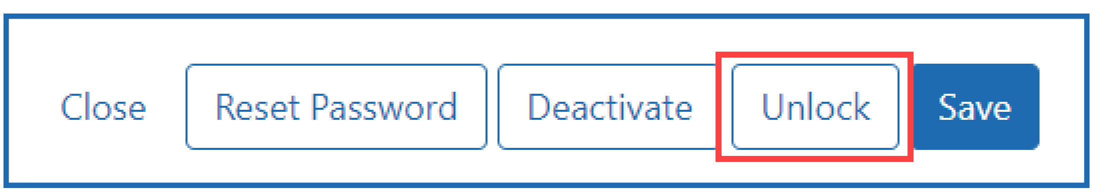



*Figure 34: Unlock button at the bottom of the Manage Account screen*

When you click **Reactivate** or **Unlock**, the *Reactivate Account* or *Unlock Account* screen opens.

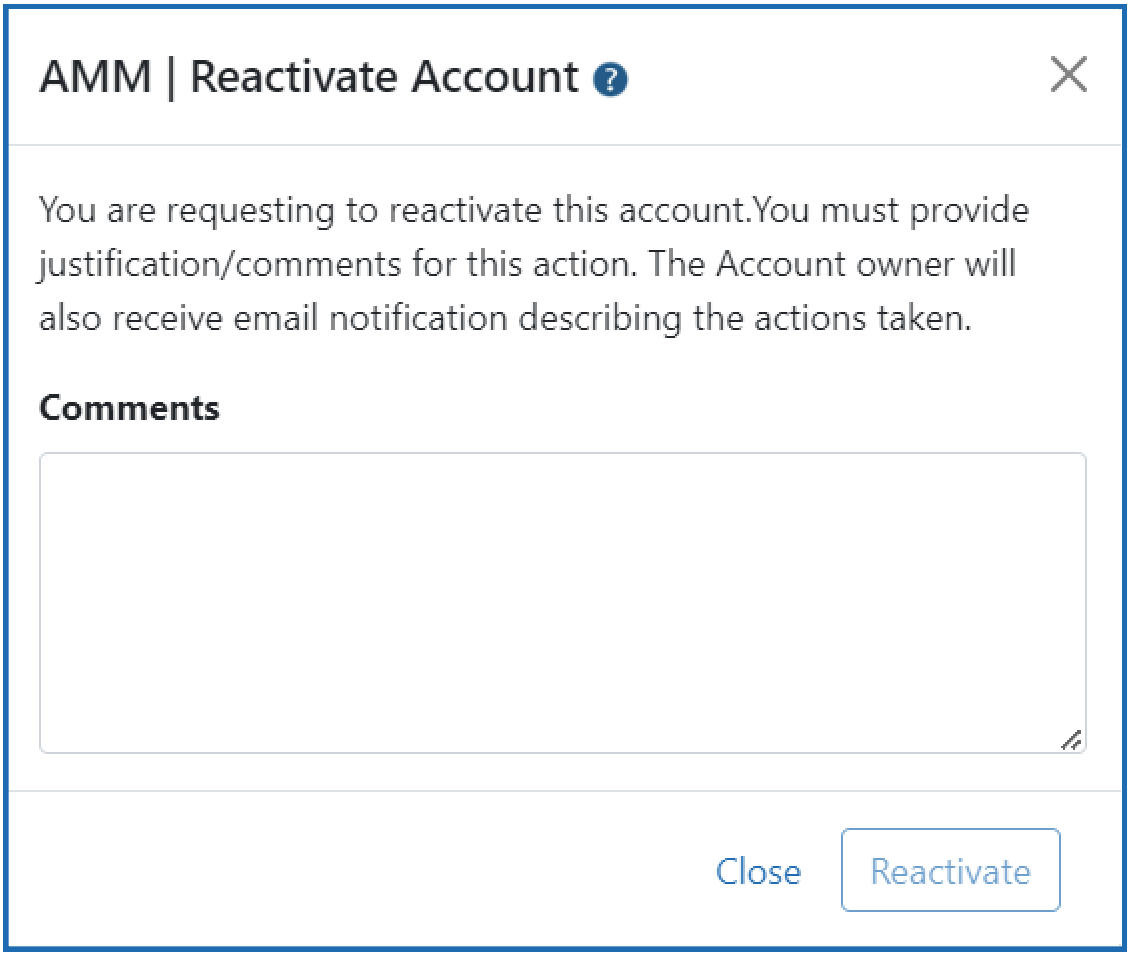



*Figure 35: Reactivate Account screen*

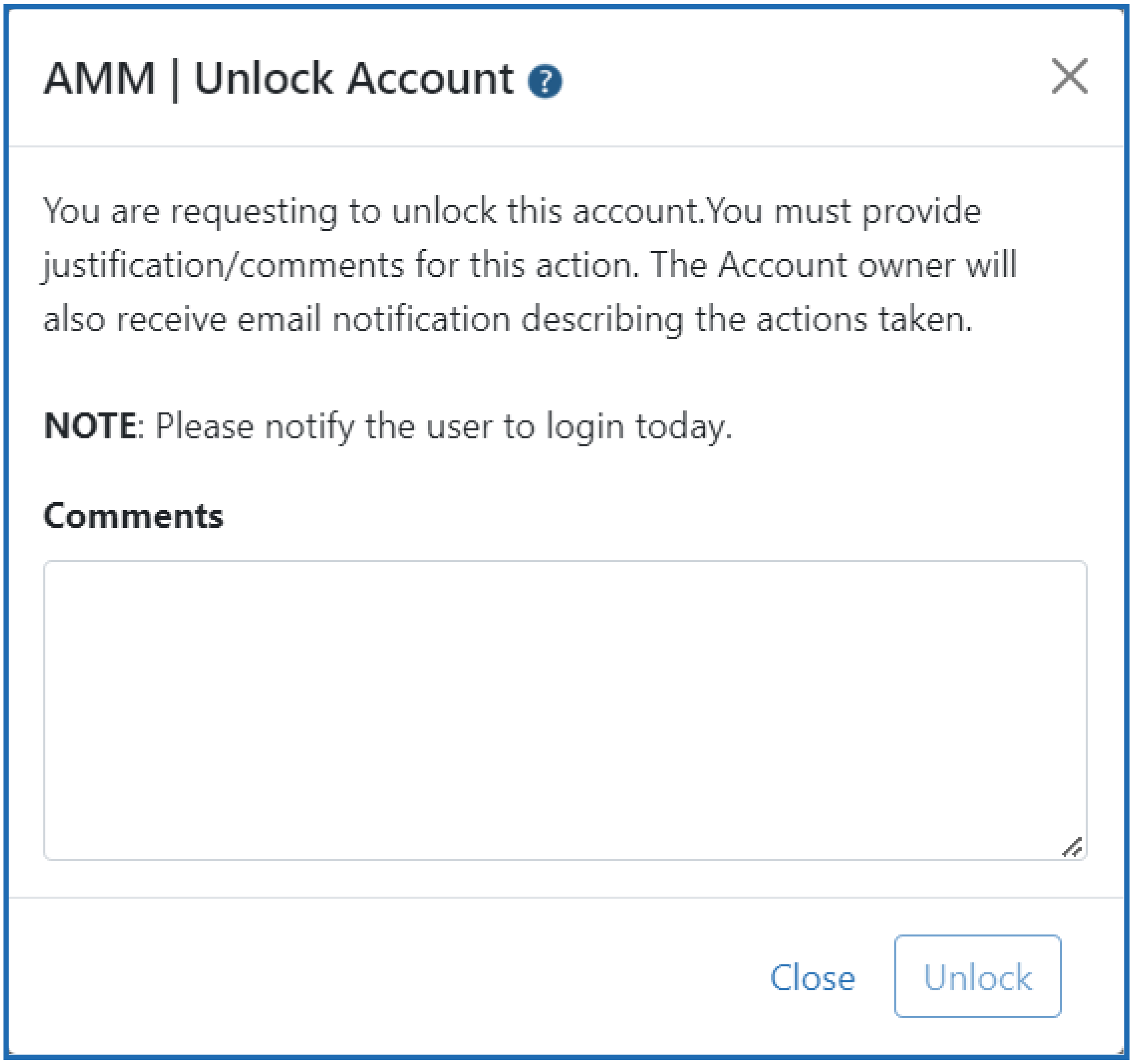



*Figure 36: Unlock Account screen*

Enter comments in the comments field to inform the user about this action (required). Click **Reactivate** or **Unlock** to reactivate/unlock the account, or click Close to cancel.

a. Enter comments in the comments field to inform the user about this action (required).
b. Click **Reactivate** or **Unlock** to reactivate/unlock the account, or click **Close** to cancel.

5. When you click **Reactivate** or **Unlock**, the system reactivates/unlocks the account and displays a confirmation message.
6. The account owner receives an email notification that includes the text you enter in the **Comments** field.

**NOTE:** The unlock notification asks the user to login to the account that same day. If the user does not login before the end of the day, the account is locked again.

**NOTE:** For instructions on deactivating an account, see Deactivate Account.

## Add/Delete Countries

**Agency-Specific Instructions:** This functionality is for State Department users only.

1. To add a country to the account, click on the **+ Add Countries** button on the *Create Accounts* screen.

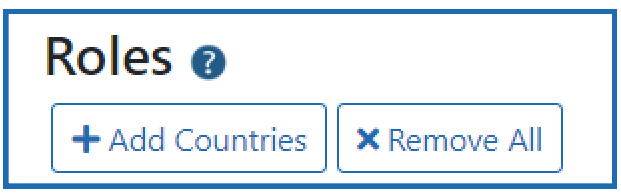



*Figure 37: Add Countries Button*

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

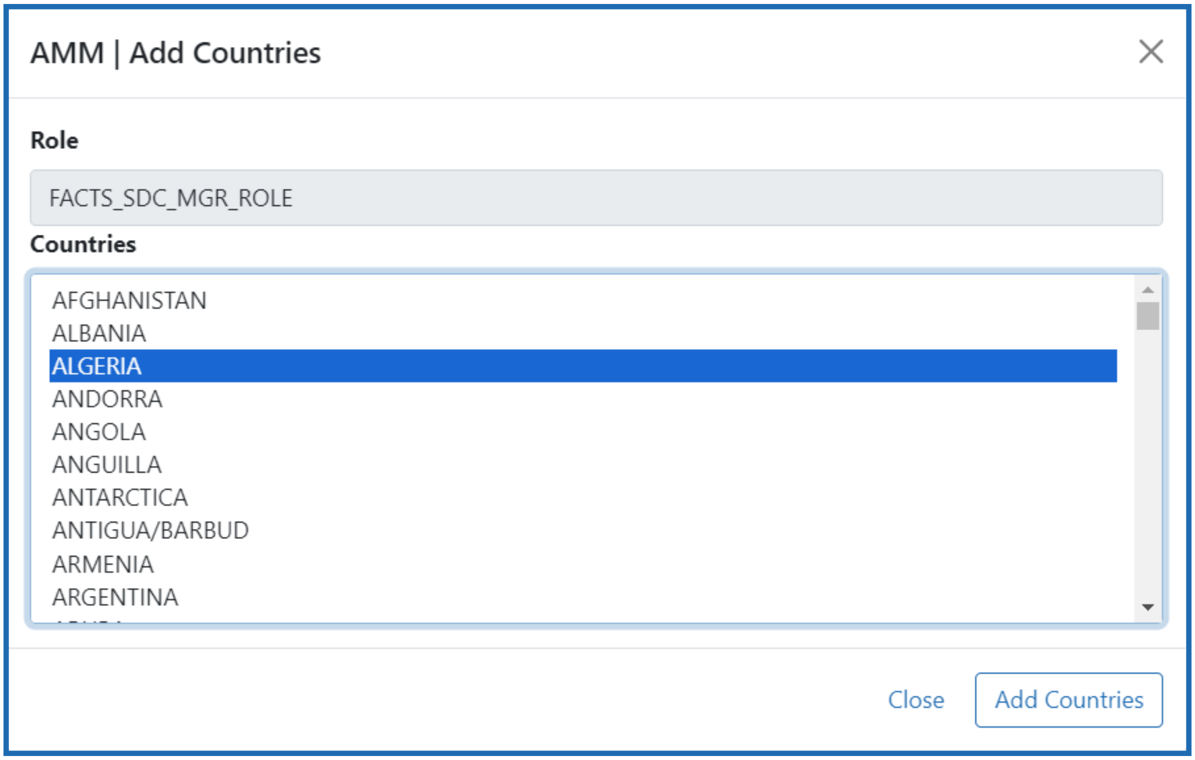



*Figure 38: Add Countries Screen*

2. To find a country, click in the list of countries and type the first letter of the country's name.
    a. For example, to find the United Kingdom hit the **<U>** key on the keyboard.
3. Highlight the appropriate country name.

When a country name is highlighted, the **Add Countries** button is enabled.

4. Perform one of the following options:
    a. Click the **Close** button to close the screen.
    b. Click the **Add Countries** button to add the selected country.

Clicking the **Add Countries** button adds the selected country to the *Roles* section on the *Create Account* or *Manage Account* screen.


*Figure 39: Roles/Add Countries Section on the Create Account Screen*

5. To add another country, click the **+ Add Countries** button. Repeat the steps above.
6. To remove a country, click the **X Remove** button.
7. To remove all countries, click the **X Remove All** button.

## 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.

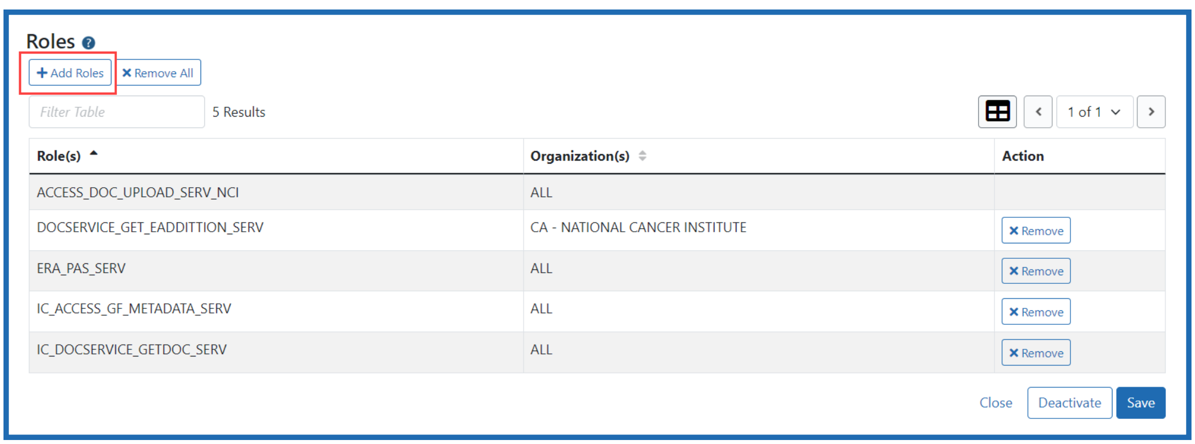



*Figure 40: Add Roles Button on the Create Account Screen*

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

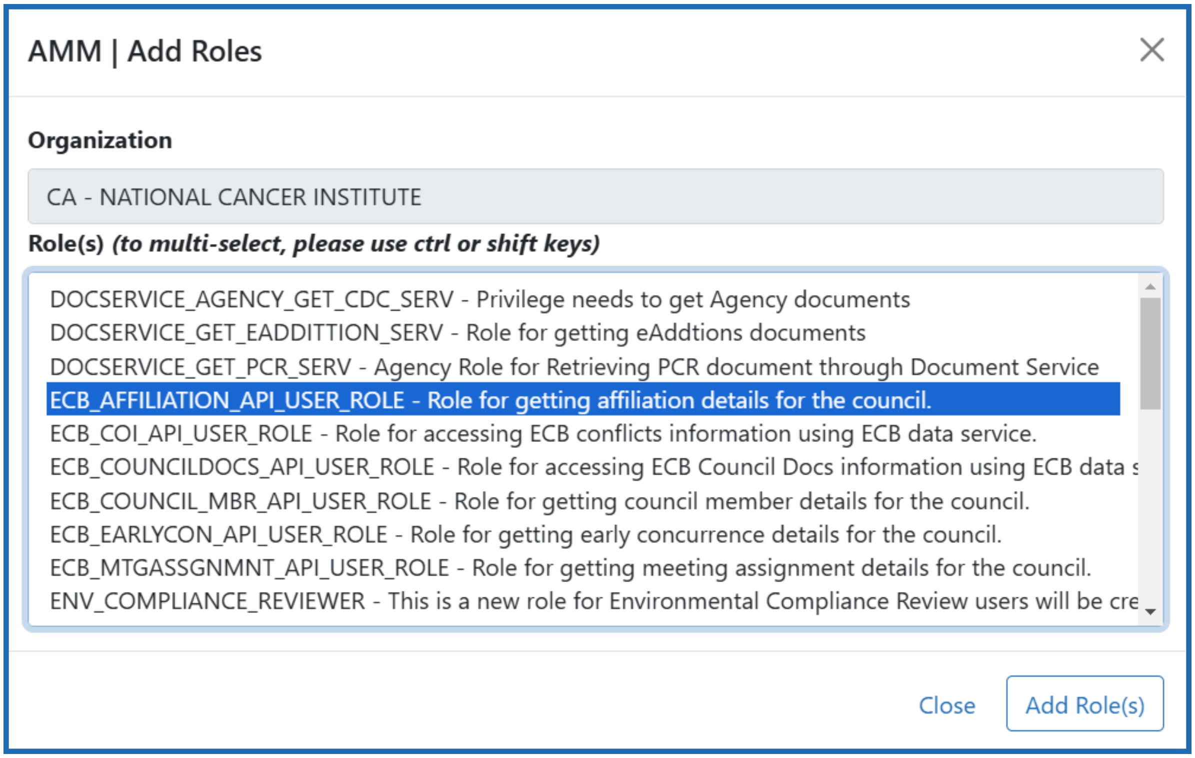



*Figure 41: Add Roles Screen Displaying Agency System Roles List*

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).

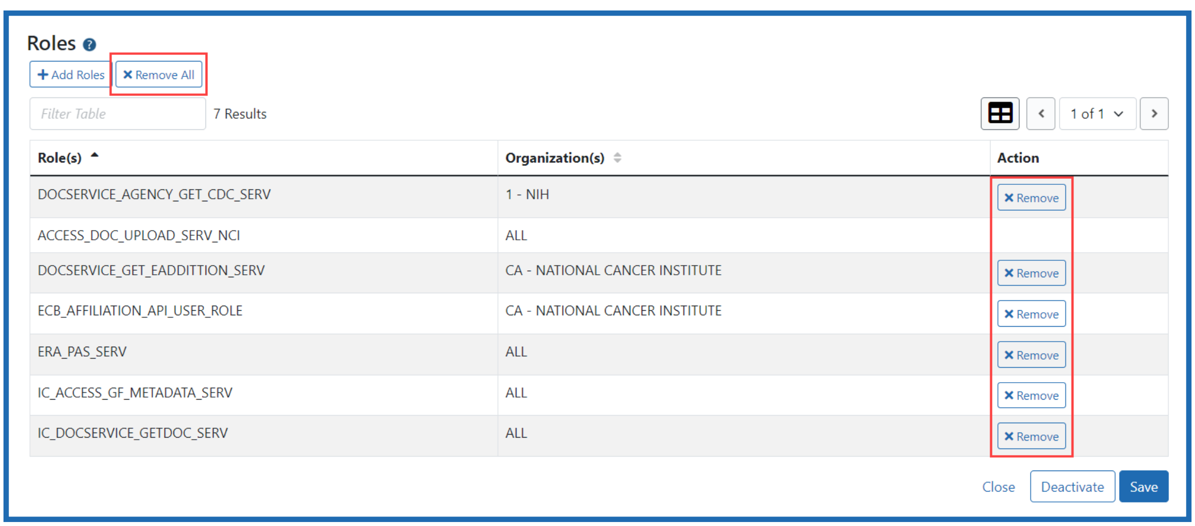


*Figure 42: Roles Section on the Create Accounts Screen for Agency Users*

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.

## Annual Recertification

This screen opens when you select **Annual Recertification for State Accounts** from the Admin dropdown menu.

eRA Service Desk agents, Account Admins and IC Account Coordinators use this screen to review all the all non-deactivated user accounts in their ICs, including application and DB accounts. After reviewing the accounts, IC Coordinators make all necessary updates and changes and then recertify them.

This screen shows accounts at the IC that were created on or before the Recertification Period Start Date and are not deactivated. (status 1, 3, 4 & 5). AMM shows you only the accounts that you are responsible for based on the type of Admin you are.

A banner at the top of the screen shows the number of accounts that are pending review, if applicable.

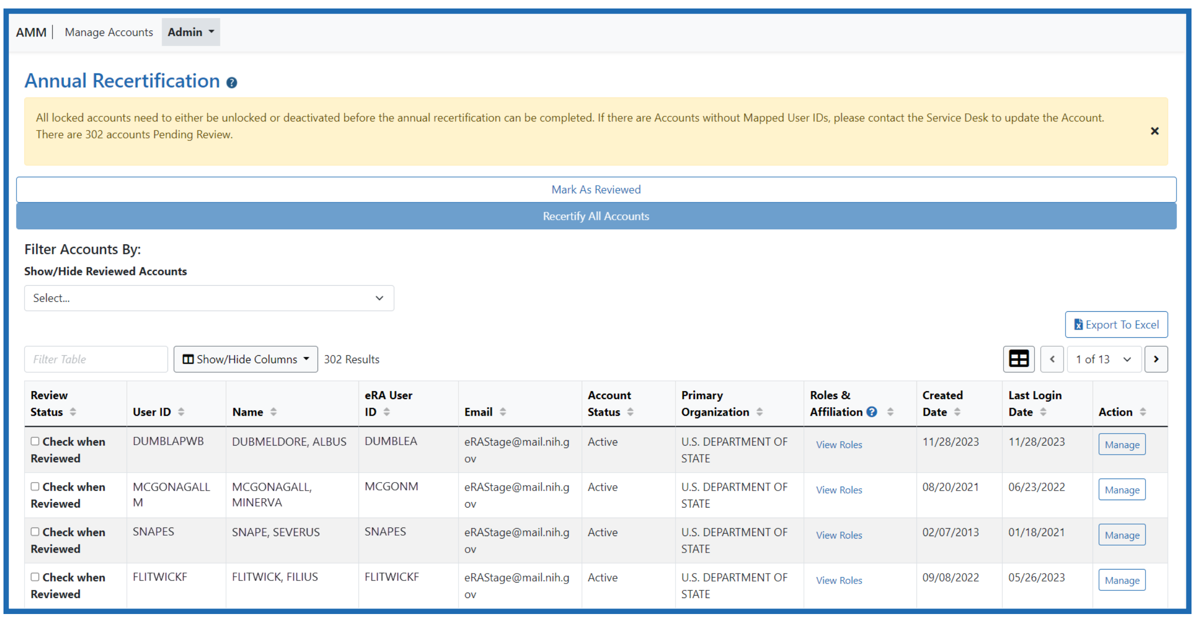



*Figure 43: Annual Recertification of User Accounts*

## Actions

Use the tools in this screen to review and recertify accounts:

### Show Account Data

- **Select IC** — If you are responsible for more than one IC, use the **IC** drop-down menu to select the one you want to work with.
- **Filter** — You can use the filters at the top of the screen to filter the accounts by Org/Department, Additional Information, NED Federal Supervisor, Account Status, NED Org Path, and Show/Hide Reviewed Accounts.
- **Show/Hide Columns** — Click to select the columns to show in the table.
- **View Roles** — In addition to the on-screen information, you can click the **View Roles** hyperlink to open a View Roles pop-up window and review the account's user roles.

### Review and Update Accounts and Roles

- Review information for all accounts and associated roles.
- If necessary, click the **Manage** action for an account to make updates and changes in the Manage Account screen, which will open in a new tab.
- **Check when Reviewed** — Click the checkboxes in the Review Status column when you finish reviewing accounts.
- **Mark As Reviewed** — Click to mark all displayed accounts as reviewed in bulk (accounts that are hidden by the filters will not be marked as reviewed). A confirmation popup verifies that you wish to review all accounts. Click **Continue** to proceed.


*Figure 44: Mark As Reviewed button*

**IMPORTANT:** All locked accounts need to either be unlocked or deactivated before the annual recertification can be completed. If there are Accounts without Mapped User IDs, please contact the Service Desk to update the Account.

**NOTE:** As an Account Coordinator, you cannot mark your own account as reviewed. Another Account Admin will have to Review and make any changes to your account and mark it as reviewed.

- The *Reviewed by* name and date in the *Review Status* column will be updated if the account is updated via the Manage Account screen after the *Check when Reviewed* box is checked.


*Figure 45: Review Status column showing a selected checkbox and "Reviewed by" with the name and date of the review completion.*

- If account info is updated in NED after an account is reviewed, Account Coordinators have to re-review the account and check the Reviewed Checkbox.
- When all accounts in the IC have been reviewed, a banner at the top of the screen notifies you.


*Figure 46: Accounts reviewed banner*

**NOTE:** You still must click **Recertify All Accounts and Associated Roles** to complete the recertification process.

### Recertify Accounts

- After reviewing all accounts, click the **Recertify All Accounts and Associated Roles** button at the top of the screen to recertify all accounts.


*Figure 47: Recertify all Accounts and Associated Roles button*

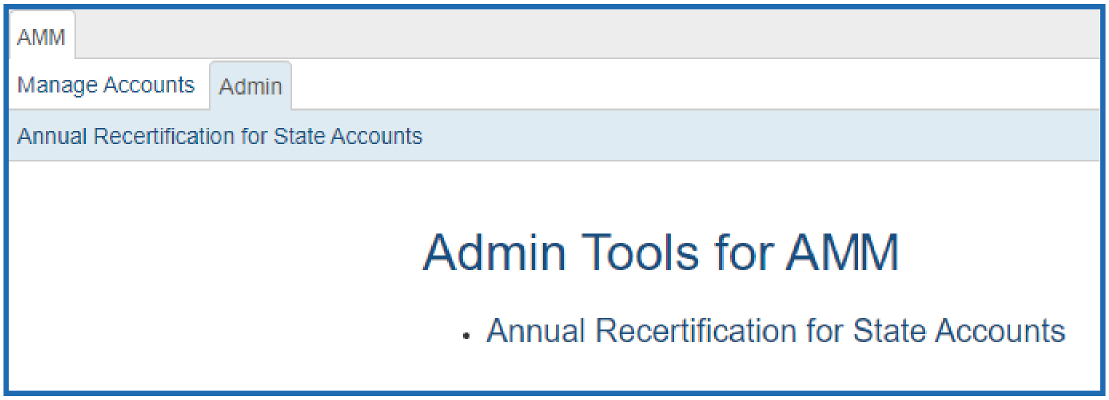
- A green success banner displays, with a blue banner indicating the date of completion and the IC you have recertified.


*Figure 48: Blue Annual Recertification Completed banner and Green Recertification success banner*

- After you successfully recertify accounts, AMM sends you a confirmation email that includes a link you can click to see a list of the accounts you recertified.
- AMM will deactivate accounts that are locked due to 120 days of inactivity and not recertified or logged in within 30 days after the annual recertification.

## Admin Tools

Account Coordinators click the **Admin** tab to access the following account administration tools:

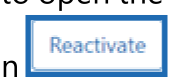



- Annual Recertification for State Accounts
  Review and Recertify State Dept user application and database accounts

## Reactivate/Unlock Account

**IMPORTANT:** The Reactivate/Unlock Account feature is not currently available to Commons Account Coordinators.

**NOTE:** Users with the Account Administrator (AA) role can reactivate accounts that have been deactivated by an administrator or automatically locked due to inactivity.

On the *Search Results* or *Account Details* screens, click **Manage** to open the *Manage Account* screen. If an account is deactivated, a **Reactivate** button 

displays at the bottom of the *Manage Account* screen. Click this button to proceed.

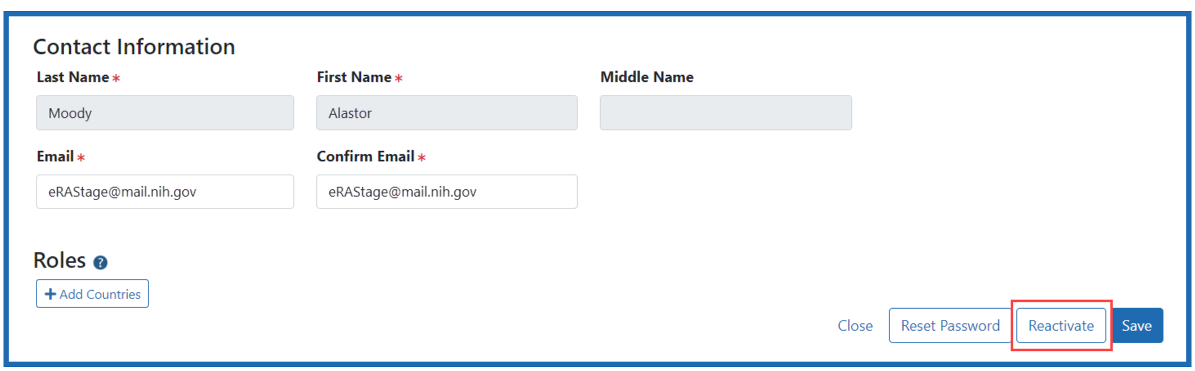



*Figure 49: Reactivate button at the bottom of the Manage Account screen*

2.a If an account is locked due to inactivity, an **Unlock** button displays at the bottom of the *Manage Account* screen. Click this button to proceed.


*Figure 50: Unlock button at the bottom of the Manage Account screen*

When you click **Reactivate** or **Unlock**, the *Reactivate Account* or *Unlock Account* screen opens.

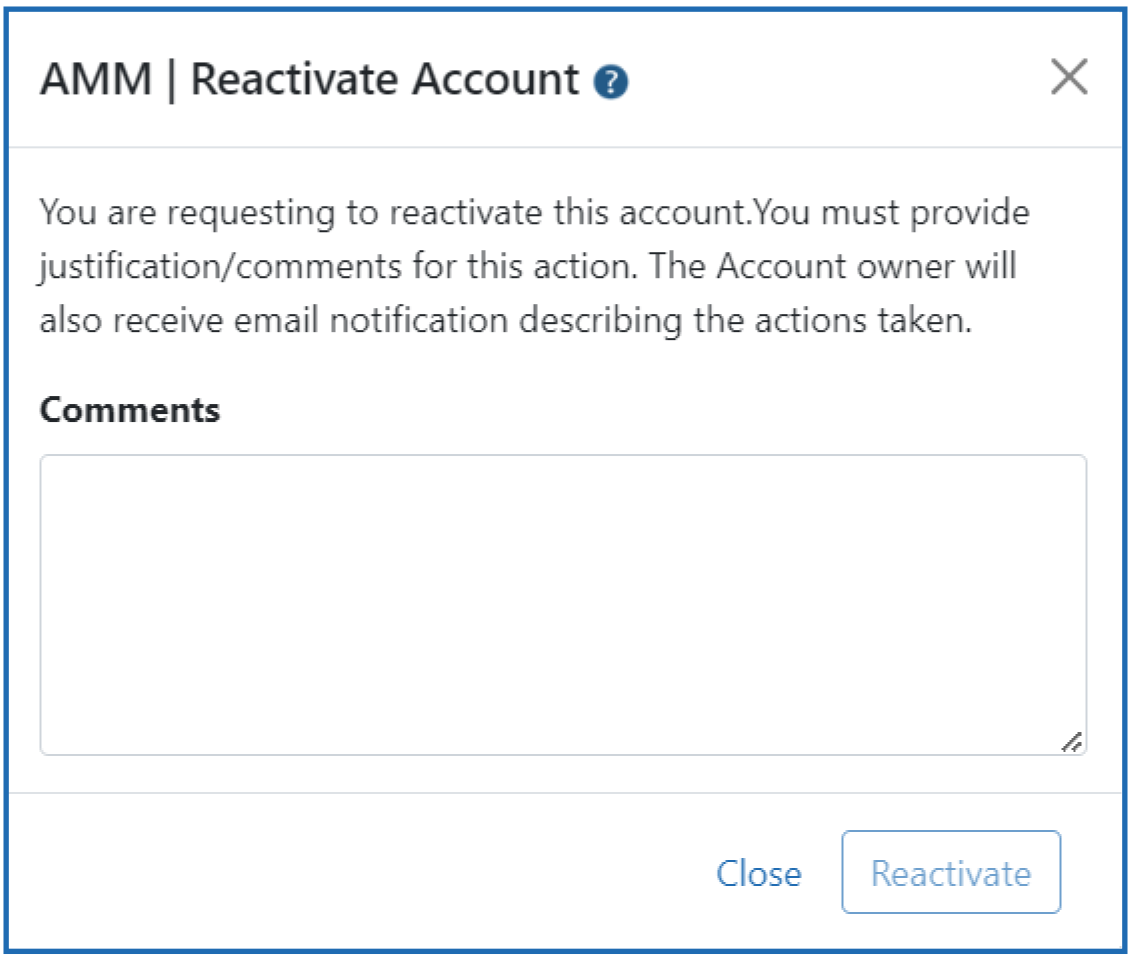



*Figure 51: Reactivate Account screen*

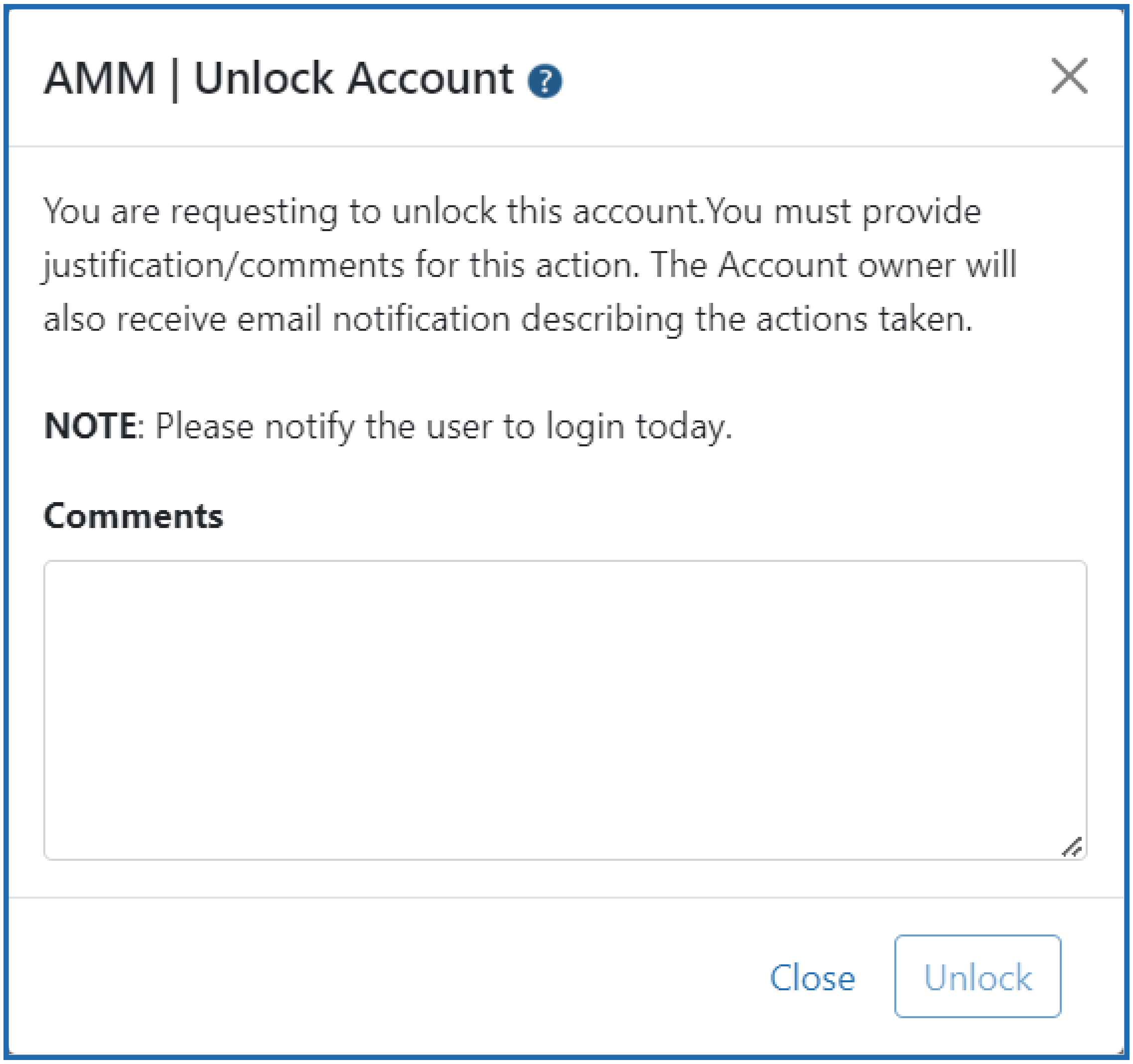



*Figure 52: Unlock Account screen*

Enter comments in the comments field to inform the user about this action (required). Click **Reactivate** or **Unlock** to reactivate/unlock the account, or click Close to cancel.

a. Enter comments in the comments field to inform the user about this action (required).
b. Click **Reactivate** or **Unlock** to reactivate/unlock the account, or click **Close** to cancel.

5. When you click **Reactivate** or **Unlock**, the system reactivates/unlocks the account and displays a confirmation message.
6. The account owner receives an email notification that includes the text you enter in the **Comments** field.

**NOTE:** The unlock notification asks the user to login to the account that same day. If the user does not login before the end of the day, the account is locked again.

**NOTE:** For instructions on deactivating an account, see Deactivate Account.

# 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

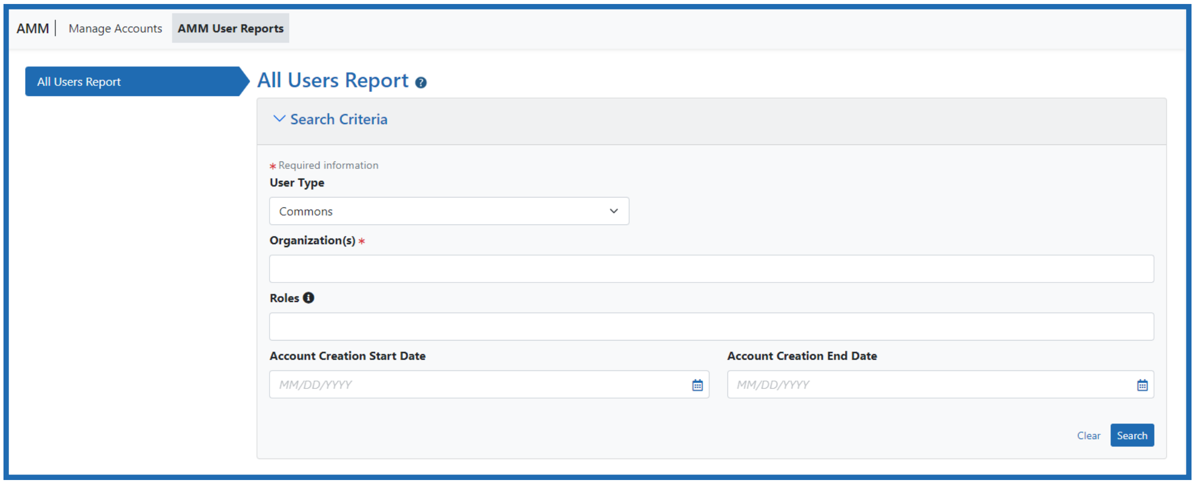



*Figure 53: All Users Report Screen for External Users*

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.

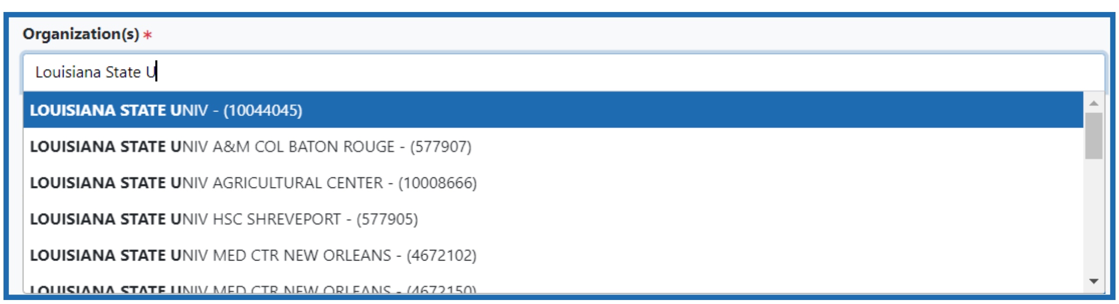



*Figure 54: Organization field, external*

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.

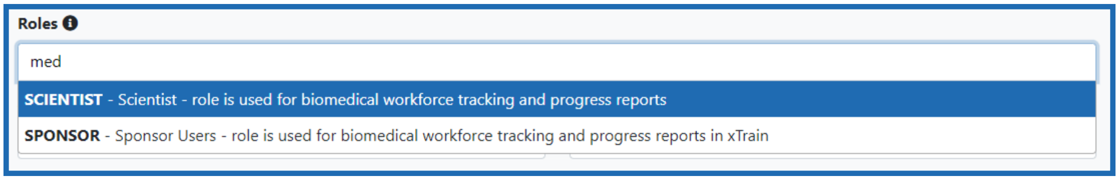



*Figure 55: Roles drop-down menu*

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.

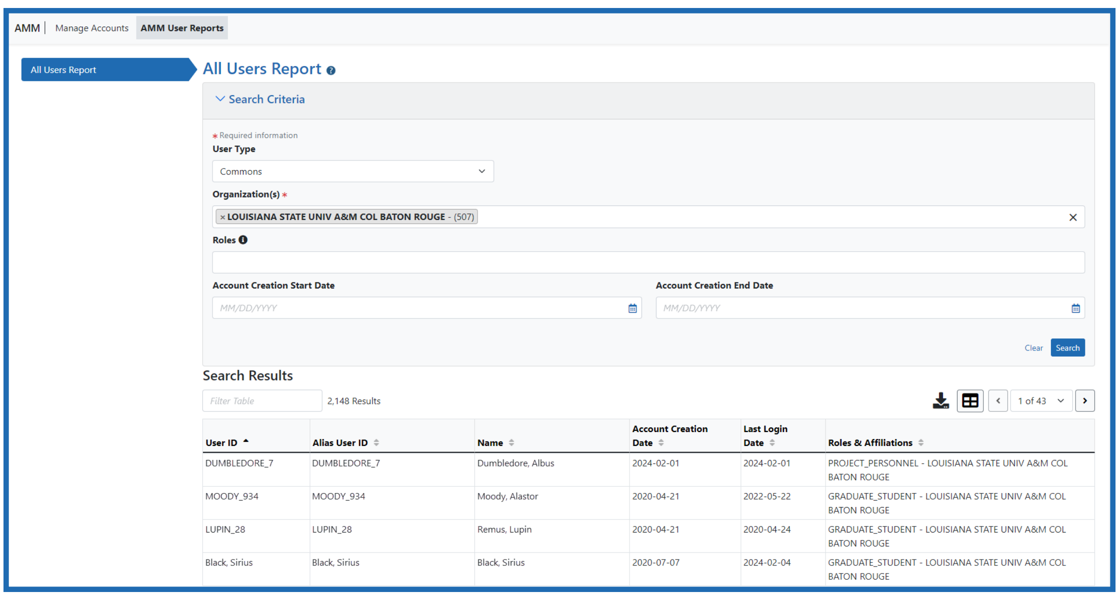



*Figure 56: All Users Report output*

*Figure 57: All Users Report Screen for Internal Users*

*Figure 58: Organization field, internal*

*Figure 59: Business Area field*

*Figure 60: Roles field*

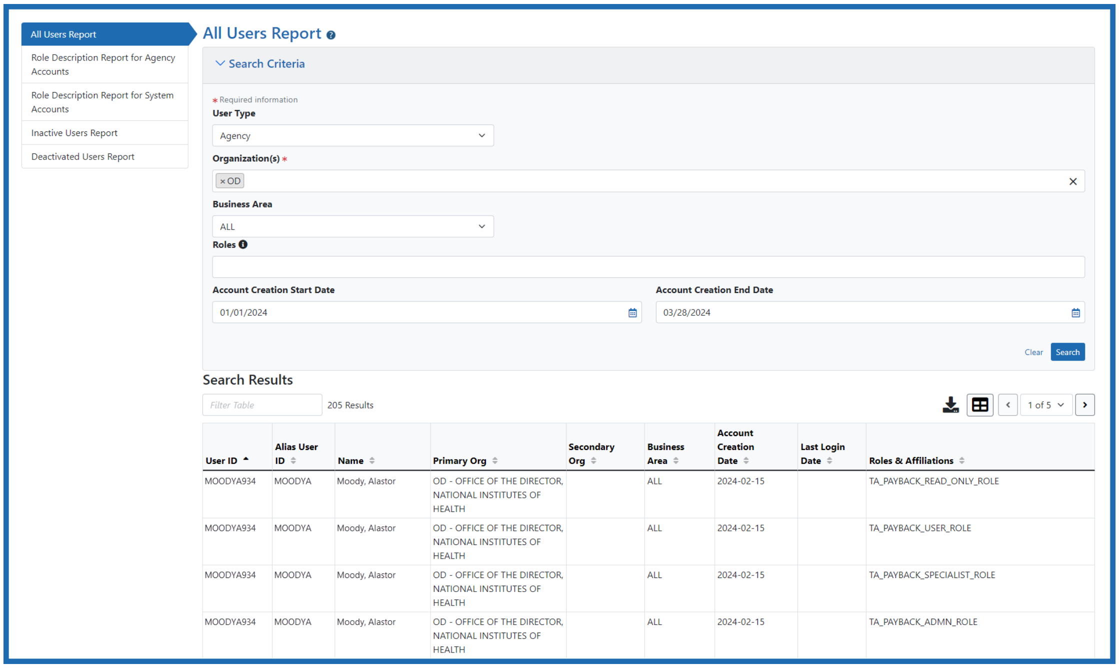



*Figure 61: All Users Report output for internal users*

## 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:

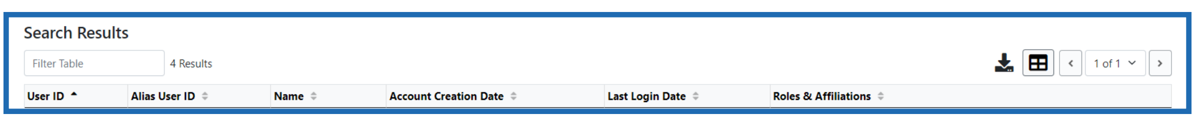



*Figure 62: Report output controls*

- 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:

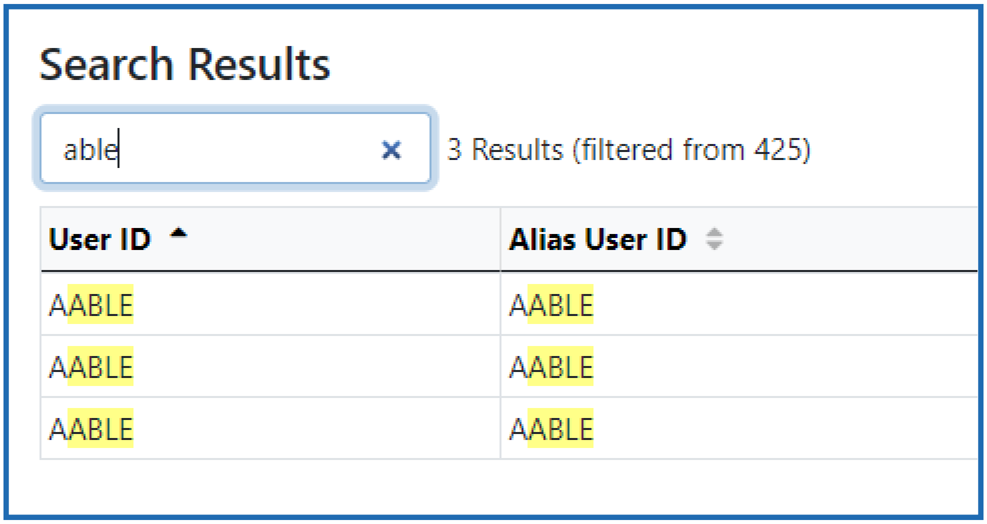



*Figure 63: Filter results*

- 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:

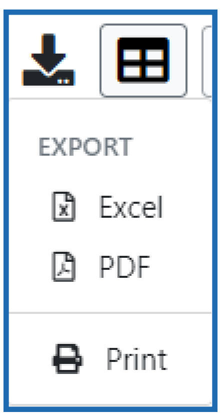



*Figure 64: Export button*

- **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.

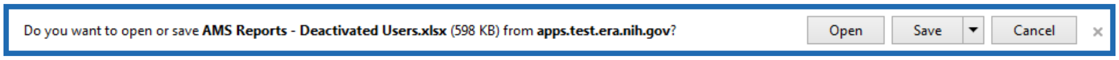



*Figure 65: Open-or-save dialog*

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