Adding and Editing Users – Organization and Documents

Add Edit Users General Information and Notes

> ➢ Note: It's the Subgrantee Administrator's responsibility to manage users for the organization & the grants.
> ➢ Note: Only Subgrantee Administrator's can add, delete and manage users.
> ➢ Note: New Users added to the Organization are not automatically added to eGrants documents (i.e. Proposals, Grants, PRs and RFRs) that were created **_before_** the New User was added to the Organization. eGrants will add them automatically for all future documents created after the New User has been added to the Organization or eGrants documents (i.e. Proposals, Grants, PRs and RFRs).

Step 1. Subgrantee Administrator: Create/Add New User for your Organization

a. Login to eGrants https://www.txdot.gov/apps/egrants
b. Click Organization(s) link to view your Organization page.
c. Click the Organization Members link to display the Organization Members page.
d. Click the Add Members link.
- To Create a New User to add to eGrants and your Organization:
  - ✓ Click the NEW MEMBER button.
  - ✓ Enter the New User contact information on the Add/Edit Members page including all required fields(*) and **Role**.
  - ✓ Click SAVE & ADD TO ORGANIZATION to add the New User to eGrants and your Organization as a Current Member.
- To Add a New Member already in eGrants to your Organization:
  - ✓ Enter the partial name of the person you wish to add in the **Person Search** field.
  - ✓ Click the SEARCH button.
  - ✓ Locate person in the Search Results
  - ✓ Check checkbox next to Person:
  - ✓ Assign the User a Role:
  - ✓ Enter an Active Date:

☐ Person	Role	Active Dates	Assigned By	Modified By
☑ Test, Mr, eGrants	Subgrantee Administrator ▾	7/13/2011 -		

e. Click SAVE & ADD TO ORGANIZATION to add the New User to eGrants and your Organization as a Current Member.

Step 2. Subgrantee Administrator: Add New User to Organization Documents

a. Login to eGrants https://www.txdot.gov/apps/egrants
b. Click Proposal/Grant tab. In Search Proposal/Grant, click CLEAR; click SEARCH. Grants assigned to you are listed.
c. Click on the grant ID (Name Column) of the grant you want to add users to in the search results.
d. On the Grant Menu, under 🅑 Access Management Tools; click VIEW MANAGEMENT TOOLS.
e. Click the 👤 ADD/EDIT PEOPLE link.
f. On the Current People Assigned the New User you just added to the Organization will appear at the bottom of list of users and will be unchecked and not have an Active Date.
g. Check the checkbox next to the User you wish to add to the Document
h. Assign a Role using the Drop Down field.
i. Assign Active Dates.
- In the first box Enter the starting active date for the user.
- Leave the second box blank for open ended access for the user or you may enter a de-active or end date.
- SAVE the page.
j. Repeat this process for any other documents such as Performance Reports or Request for Reimbursements.