

PCCD Egrants User Management Access Request Quick Start Guide

Note: Some User Managers have asked us if they can just grant access to their users without users first having to request access. Unfortunately, this would require User Managers to search through our entire database of people. This would mean a User Manager would have access to names, addresses, and phone numbers for everyone in our database (over 7000 people). In some cases, this includes confidential addresses and home and cell phone numbers. Therefore in order to protect our clients' privacy, we must require that individual users initiate the requests.

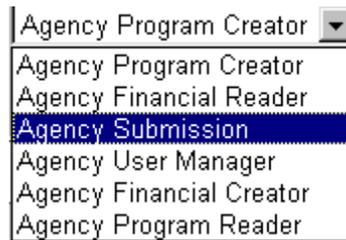
1. Once you have completed and saved your profile, click on the **“User Management”** tab on the menu bar. You will be transferred to the **“User Access Request”** page. (You can also click on the “Access Requests” link below the tabs for the same result.)
2. Click on the “Join New Agency” button. You will be transferred to the **“Join Agencies Search”** page.
3. Enter some information about your agency in the search criteria boxes. You may search on the “Agency Name”, “City” or select a county from the “County” dropdown list. (You can also enter partial information in the text boxes. For example if you want a listing of all agencies that begin with the letter “P” just enter “P” in the “Agency Name” box.) You may use any combination of criteria to search.
4. Click on the “Search” button. Records that match your criteria will be displayed in the grid. If there are no records that match your criteria the message “No records found!” will be displayed above the grid. In many cases, this might happen if you spell your agency name differently than it is entered in the system. For example, if you enter “PA” the system won’t find “Pennsylvania.” It’s best to use fewer letters to find your agency.
5. Click on the “Agency Name” for the agency that you wish to join. You will be transferred to the **“Join Agency”** page. The agency information will be filled in on the page automatically. If this is not the correct agency, click on the “Cancel” button to be returned to the previous page. **Note: The address displayed is for the agency not the user.**

Note: If the User Manager(s) reflects “None,” your agency does not have a user manager and PCCD must process your security request. Complete the [“Egrants User Registration Request Form,”](#) found at the Egrants Help Center, and FAX to PCCD Egrants Support at (717) 783-7165.

6. Enter a reason for the request for access to this agency in the “Reason For Request:” text box in the middle of the page. If you do not enter a reason you will receive a validation message – **“Must enter request reason.”**

- Select the “GrantID” or “All” in the “Requests” section of the page. This dropdown will have all of the grants for the agency that you are requesting access to. If there are no grants yet for this agency, the dropdown will only have “All” listed. You may be granted access to only a specific grant if that is the only one you are working with. The agency “User Manager” is the one who will make the decision as to what you have access to.

Select the role that you are requesting for this agency from the “Roles Requested” dropdown (see below). There are 6 to choose from. You may request more than one role. Select the first one you wish to add by clicking on it (it will receive the focus and be highlighted in blue) and then click the “Add Role Request” button. Do this for as many roles as you are requesting. There is a “Quick Start Guide” that explains the roles located on the website at [User Roles](#).



Roles dropdown

The grid below shows the example of a user requesting “Agency Submission, Agency User Manager and Agency Program Reader.

Requests

GrantID-Project: [All]

Roles Requested: Agency Program Reader

Requested Action	Requested GrantID-Project	Requested Role	
Add	[All]	Agency Submission	<input type="button" value="Remove"/>
Add	[All]	Agency User Manager	<input type="button" value="Remove"/>
Add	[All]	Agency Program Reader	<input type="button" value="Remove"/>

Agency Requests for multiple roles

- When you are finished adding roles, click on the “Submit Request” button at the bottom of the page. You will be transferred back to the “**User Access Request**” page. The request will now display in the “Request History” section of the page. The system will place a task in the User Manager’s “Work Manager” to review your request, but it is advisable to let the User Manager know you have completed a request.