PCCD Egrants Security Roles
Quick Start Guide

The purpose of this guide is to provide a quick reference for Egrants User Managers as they manage access to their agency's projects within the Egrants system. Additional information on the registration process and user management is available on the Egrants website at: www.pccd.pa.gov/Funding/Pages/Egrants-Home

In order to provide as much flexibility as possible to applicant agencies, security within the Egrants system is role-based. There are six security roles available to applicant agencies, and individual users may have any combination (including all) of these roles. In addition, User Managers may choose to assign roles on a project-by-project basis, or they may assign roles to a user for all of the agency's projects.[1]

The six roles are as follows:

ROLE	DESCRIPTION
1. PROGRAM READER	This role allows a user **READ-ONLY** access to all programmatic data within a project. This includes all summary project data (the kind of information that would, in the past, have appeared on the first page of a printed application); all narrative sections not specifically associated to the budget; and all sections devoted to performance measurement. Examples include, but are not limited to: Problem Description; Project Description; and Performance Measures.
2. PROGRAM CREATOR	This role allows a user **READ/WRITE** access to all programmatic data within a project. This includes all summary project data (the kind of information that would, in the past, have appeared on the first page of a printed application); all narrative sections not specifically associated to the budget; and all sections devoted to performance measurement. Examples include, but are not limited to: Problem Description; Project Description; and Performance Measures. This role can also submit program reports.

[1] Users do not have to be employees of an agency to receive access. If an applicant agency is working on a project with another agency (via pass-through or other contractual arrangement) the applicant's User Manager can grant access to that project to a member of the other agency provided that person has registered on the Egrants system and requests access.

ROLE	DESCRIPTION
3. FINANCIAL READER	This role allows a user **READ-ONLY** access to all financial data within a project. This includes all summary project data (the kind of information that would, in the past, have appeared on the first page of a printed application); all budget sections and line items; and some contractual sections such as Recipient Agency Budget.
4. FINANCIAL CREATOR	This role allows a user **READ/WRITE** access to all financial data within a project. This includes all summary project data (the kind of information that would, in the past, have appeared on the first page of a printed application); all budget sections and line items; and some contractual sections such as Recipient Agency Budget. This role can also submit fiscal reports.
5. SUBMISSION	This role allows a user to **SUBMIT** applications, modifications, and continuations. A user without this role may work on a project, but will not be able to submit it to PCCD. Similarly, if a project were returned to the applicant for revisions, only users with this role could re-submit the revised project. This role can allow agencies (particularly larger ones) to enforce some level of review over what is submitted to PCCD.
6. USER MANAGER	Though the title can be somewhat confusing, this role allows a user to **MANAGE SECURITY ROLES** (access) for an agency's projects. While agencies can have as many User Managers as they need to accommodate their business processes, PCCD will only set up the first User Manager per agency. Because we make over 1300 grants per year, some to very large agencies, we cannot handle user management tasks for all our applicants. Each applicant agency registering in the Egrants system will be required to designate a person as their User Manager, and PCCD will establish the appropriate role(s) for that person. That person then assumes the responsibility for managing users for the applicant agency's projects. (We strongly recommend that the agency have more than one User Manager to cover in case of illness/accident, but it would be the initial User Manager's responsibility to create second and subsequent User Managers.)

NOTE ON ACCESS REQUESTS: In order for a User Manager to grant access to a project, a system user must first request access. Several agencies have asked that we give User Managers the ability to grant access without first receiving this request. We CANNOT do this. To do so, we would have to allow a User Manager to search through personal demographic data for all people stored in our system. Because the system maintains some data that is not associated with public documents, we cannot allow this. We apologize for any inconvenience this may cause.