

# EGRANTS USER ROLE REQUEST WALKTHROUGH

A guide to  
requesting access  
to roles in Egrants



# INFORMATION GUIDE

This walkthrough provides a general overview of how to gain access to an Agency's grants in the PCCD Egrants system.

You may follow this walkthrough page by page or click on a step listed on the right of this slide for information on a specific step of the process.

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# 1. REQUEST ACCESS TO AGENCY ROLES

Back Button will not take you back pages, instead use the application menus and controls.

[Main Menu](#) | [User Management](#) | [Funding Announcement](#) | [Project Management](#) | [Work Manager](#)

## Welcome to PCCD Egrants!

*Please select a menu tab or prompt link to continue.*

[CLICK HERE](#) To access an existing project (Grant Application, Continuation Application, Modification...) or create/update reports such as the Program Report, Fiscal Report, or Inventory Report ([Project Management](#) tab).

[CLICK HERE](#) To create a new Application (or Concept Paper) in response to a Funding Announcement ([Funding Announcement](#) tab).

[CLICK HERE](#) To view any Alerts and/or Tasks assigned to you ([Work Manager](#) tab).

[CLICK HERE](#) To update your profile information (Name, Address, Phone Number...) or to request security in order to maintain or view grants for your organization/county ([User Management](#) tab).

[CLICK HERE](#) To Subscribe to receive an email when new granting opportunities become available.

[CLICK HERE](#) To Unsubscribe from Email notifications when granting opportunities become available.



If you see the **Agency** you wish to join in the table located on the User Access Request page, click on the linked **Agency name**. If the Agency you need access to is not listed in the table, click the **Join New Agency** button.

*Most new users will need to click the Join New Agency button.*

USER ACCESS REQUEST

Current Agency/Project Roles Access

Click "Join New Agency" button to request a role(s) for a new agency or select an "Agency" table link to request role modification at an existing agency.

[Join New Agency](#)

Agency	GrantID	User Role
<a href="#">Sample Agency</a>	[All]	Agency Financial Creator, Agency Program Creator, Agency Submission

On the **Join Agencies Search** page, you'll enter information in one or more of the **Search Criteria** fields then click the **Search** button. It is best to enter as little information in the search criteria fields as possible.

JOIN AGENCIES SEARCH

**Search Criteria:**

Agency Name:  x

Tax ID:

City:

County:  ▼

State:  ▼

Agency Name	Tax ID	Address	County	City	State
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Search results will appear in a table below the Search Criteria section. Click on the **Agency Name** link that matches your Agency.

**JOIN AGENCIES SEARCH**

**Search Criteria:**

Agency Name:

Tax ID:

City:

County:

State:

<u>Agency Name</u>	<u>Tax ID</u>	<u>Address</u>	<u>County</u>	<u>City</u>	<u>State</u>
<a href="#">Sample Agency</a>	24-6002530	1234 Sample St.	Dauphin	Sampleburg	Pennsylvania

If your agency does not appear in the search results or has never applied for funding from PCCD through the PCCD Egrants system, complete and submit the [Egrants Agency Registration Request Form](#). You will not be able to request Agency Roles until the Agency is registered with Egrants.

On the Join Agency page, complete the **Reason for Request** and choose which **GrantID-Project** you are requesting access to. If you would like access to all the grants under the Agency's name, choose the 'All' option.

JOIN AGENCY

Agency Name: Sample Agency  
Street Address 1: 1234 Sample St.  
Street Address 2:  
County: Dauphin  
City: Sampleburg  
State: Pennsylvania  
Zip Code: 17110-1100  
User Manager(s): None

Reason For Request: Cordon Nader requires the Financial Reader role for internal reporting purposes.

Requests

GrantID-Project: [All]

Roles Requested:

Requested Action	Requested GrantID-Pro	Requested Role	
Add	[All]	Agency Financial Reader	<input type="button" value="Remove"/>

Information on **Roles** can be found on the next page.

Access to the Agency’s grants are separated into six unique roles. To add a role, select a role from the **Roles Requested** menu and click the **Add Role Request** button. Users may request up to six roles. Please note:

- **Financial Creator** can view and create fiscal information (manage budget section information, fiscal reports, etc.)
- **Financial Reader** can view fiscal information
- **Program Creator** can view and create program information (manage program section information, program reports, etc.)
- **Program Reader** can view program information
- **Submission** can submit grant forms like applications, modification, and continuations
- **User Manager** can manage user roles for the Agency’s grants (will still need other roles if performing other duties)

JOIN AGENCY

Agency Name: Sample Agency  
 Street Address 1: 1234 Sample St.  
 Street Address 2:  
 County: Dauphin  
 City: Sampleburg  
 State: Pennsylvania  
 Zip Code: 17110-1100  
 User Manager(s): None

Reason For Request: Cordon Nader requires the Financial Reader role for internal reporting purposes.

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Requests

GrantID-Project: [All]

Requested Action	Requested GrantID-Pro	Roles Requested	Requested Role
Add	[All]	Agency Financial Creator Agency Financial Reader Agency Program Creator Agency Program Reader Agency Submission Agency User Manager	Agency Financial Reader

Add Role Request
Remove

Submit Request
Withdraw Request
Cancel



Once all desired roles have been added to the **Requests** table, click the **Submit Request** button.

JOIN AGENCY

Agency Name: Sample Agency  
Street Address 1: 1234 Sample St.  
Street Address 2:  
County: Dauphin  
City: Sampleburg  
State: Pennsylvania  
Zip Code: 17110-1100  
User Manager(s): None

Reason For Request: \* Cordon Nader requires the Financial Reader role for internal reporting purposes.

**Requests**

GrantID-Project: [All]

Roles Requested: Agency Financial Reader

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

# 3. CONFIRM REQUEST SUBMISSION

You can confirm that your request was submitted by looking at the **Request History** table, which should show the **User Roles requested** as well as an **In-Process** request **Status**.

USER ACCESS REQUEST

Current Agency/Project Roles Access

Click "Join New Agency" button to request a role(s) for a new agency or select an "Agency" table link to request role modification at an existing agency.

<u>Agency</u>	<u>GrantID</u>	<u>User Role</u>
<a href="#">Sample Agency</a>	[All]	Agency Financial Creator, Agency Program Creator, Agency Submission

Filter Criteria :

Request History Status:  ▼

<u>Agency</u>	<u>GrantID</u>	<u>User Role</u>	<u>Requested Date/Time</u>	<u>User Manager</u>	<u>Status</u>
<a href="#">Sample Agency</a>	[All]	Agency Financial Reader	8/20/2019 4:25:39 PM	None	In-Process

After submitting your request, your agency's User Manager will receive an alert to review and approved your request. Please speak with the User Manager of your agency if you do not receive access to the grant.

# Additional Information

- Use the links in the table of contents to the right to revisit any step of this walkthrough.
- If you have any questions throughout this process, email [ra-eGrantsSupport@pa.gov](mailto:ra-eGrantsSupport@pa.gov)
- For additional grant guides and walkthroughs, please visit the [PCCD Grant Guide webpage](#).

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