

## 2 FastLane Research Administration Module Overview

Users with Research Administration permissions in registered FastLane organizations can access some or all of the following permission-based functions:

- Accounts Management
- Letters of Intent
- Proposals/Supplements/File Updates/Withdrawals
- Award Documents
- Forwarded/Submitted Revised Budgets
- Notifications & Requests
- Organizational Reports
- Project Reports
- Authorized Organizational Representative Functions

If your organization is not registered in FastLane, it can be registered by using the **New Organization and FastLane Contact Registration** link available on the *Registration Information* page of the FastLane website.

When your organization is registered, a FastLane Contact is named and given a password. The FastLane contact is responsible for adding all those who need to access FastLane: Principal Investigators (PIs), research assistants, college and department business officers and support staff. Permissions are also given to those who must work in either Research Administration or Financial business functions.



After an organization and its FastLane Contact person are registered with FastLane, the organization's FastLane Contact person, or any user in the organization who has the **Add User** permission, can access FastLane's Research Administration module to add other members of their organization as FastLane users. See the Account Management user guide for more information on adding users.

## Log In

A user with permissions to access at least one of the Research Administration functions needs his or her Last Name, SSN (actual Social Security Number or pseudo-SSN assigned at account creation), and Password. The user must also acknowledge the Rules of Behavior (ROB) each time he or she changes his or her password, including during the user's first log in. More information on ROB and Password Changes can be found on page 2-5.

To log in to the Research Administration module, the user needs to complete the following steps:

1. Select **Research Administration** from the *FastLane* homepage (Figure 1).

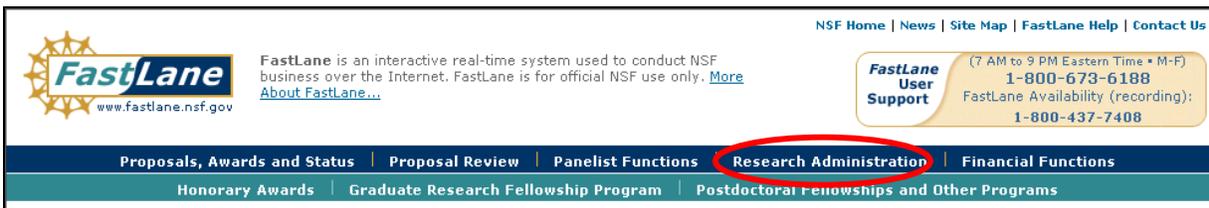


Figure 1: *FastLane* homepage (<http://www.fastlane.nsf.gov>)

2. Enter your Last Name, SSN, and Password in the Log In box on the *Research Administration Login* screen (Figure 2).



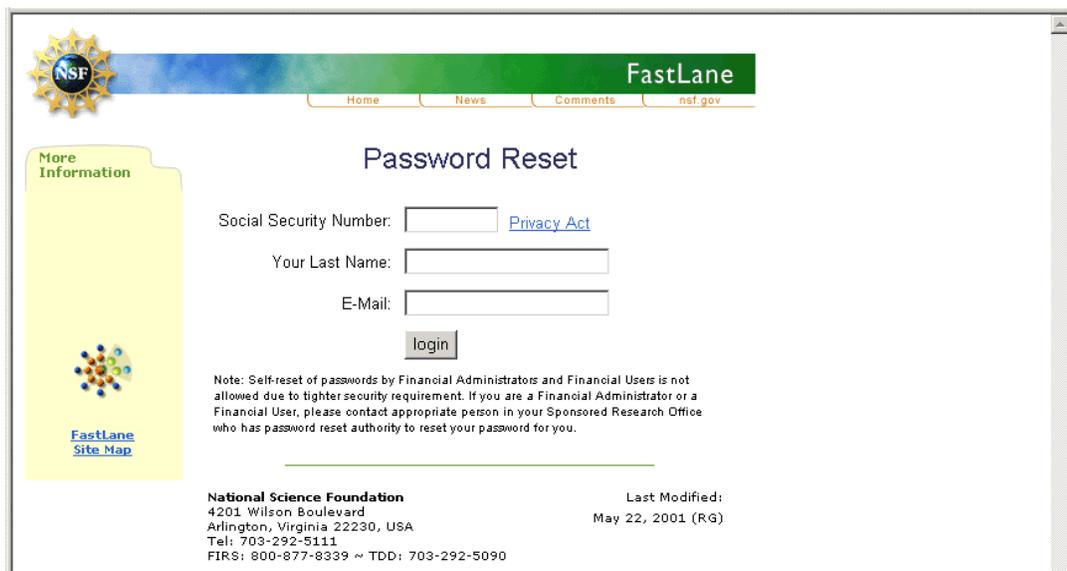
Figure 2. *Research Administration Login* screen

3. Click **Log In** on the *Research Administration Login* screen (Figure 2).
4. In the following situations, the user must acknowledge Rules of Behavior and change his or her password before being admitted access to the system:
  - a. The user logs in for the first time following the account creation (by another user).
  - b. The user chooses to reset his or her password following a warning after log on informing the user that his or her password will expire in 10 or fewer days.
  - c. The user, after a successful log in using an unexpired password, selects the Change Password link from the navigation (and logs in again if requested).
  - d. The user logs in using an expired password. (A password expires 365 days after being set for most users. Passwords expire after 120 days for users with Financial Functions permissions.)
  - e. The user logs in after having FastLane reset his or her password through the “Forgot Password” link.
  - f. The user logs in after an NSF administrator has reset his or her password.See Password Change on page 5 for detailed instructions on acknowledging Rules of Behavior and changing passwords.

## Reset Password

A user who forgets his or her password can have the password reset as long as the user knows his or her Last Name, Social Security Number (actual Social Security Number or pseudo-SSN assigned at account creation), and e-mail address that matches the e-mail address listed on his or her user account. To reset a password, the user must complete the following steps:

1. From the *Research Administration Login* screen (Figure 2), click on the **Forgot Password** link.
2. Enter your Social Security Number, Last Name, and E-Mail on the *Password Reset* screen (Figure 3).



The screenshot shows the 'Password Reset' page on the FastLane website. The page has a green header with the NSF logo and 'FastLane' text. Below the header are navigation links: Home, News, Comments, and nsf.gov. The main content area is titled 'Password Reset' and contains three input fields: 'Social Security Number', 'Your Last Name', and 'E-Mail'. A 'login' button is positioned below the 'E-Mail' field. To the right of the 'Social Security Number' field is a link for 'Privacy Act'. A note below the form states: 'Note: Self-reset of passwords by Financial Administrators and Financial Users is not allowed due to tighter security requirement. If you are a Financial Administrator or a Financial User, please contact appropriate person in your Sponsored Research Office who has password reset authority to reset your password for you.' On the left side, there is a 'More Information' section with a 'FastLane Site Map' link. At the bottom, the National Science Foundation contact information is listed, along with the last modified date: 'May 22, 2001 (RG)'.

Figure 3. Password Reset screen

3. Click **login** on the *Password Reset* screen (Figure 3).
4. Your temporary password will be sent to you via e-mail, and you will be required to acknowledge Rules of Behavior and change your password the next time you log in.

## Password Change

When setting a new password, the user must first acknowledge Rules of Behavior (ROB).

To set a new password, the user must complete the following steps:

1. A password change may be initiated in any of the following ways:
  - a. The user logs in for the first time following the account creation (by another user).
  - b. The user chooses to reset his or her password following a warning after log on informing the user that his or her password will expire in 10 or fewer days.
  - c. The user, after a successful log in using an unexpired password, selects the Change Password link from the navigation (and logs in again if requested).
  - d. The user logs in using an expired password. (A password expires 365 days after being set for most users. Passwords expire after 120 days for users with Financial Functions permissions.)
  - e. The user logs in after having FastLane reset his or her password through the “Forgot Password” link.
  - f. The user logs in after an NSF administrator has reset his or her password.
2. Read the Rules of Behavior and click on the “I have read and accept the Rules of Behavior” check box on the *Rules of Behavior* screen (Figure 4).

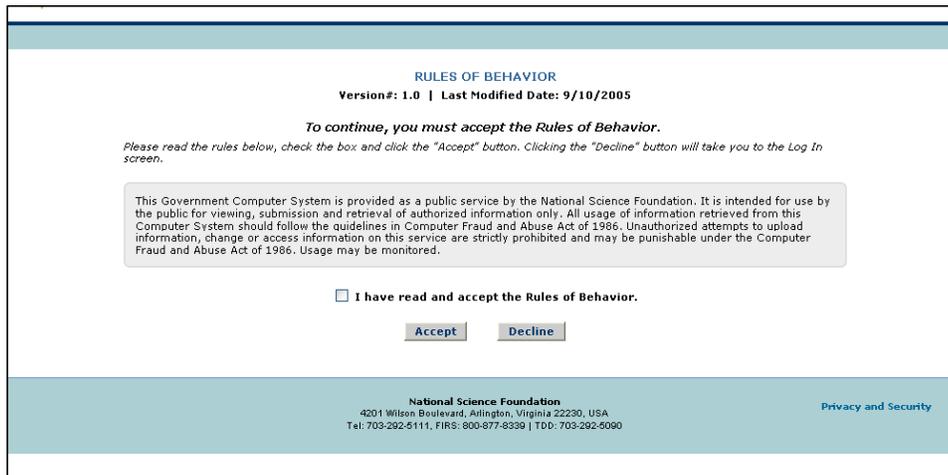


Figure 4: Rules of Behavior screen

3. Click the “Accept” button on the *Rules of Behavior* screen (Figure 4).

*\*Note: If you choose to decline the Rules of Behavior by clicking “Decline”, you will be logged out of the system. If you click “Accept” without clicking on the check box, you will receive an error message and be prompted to click on the check box.*

4. Enter your current/old/temporary password (if requested) and your a new password twice (once in each of the 2 text boxes) on the *Change Password* screen (Figure 5).

*\* Note: Passwords must be 6 to 20 characters in length, must contain at least 1 numeric and 1 alpha character, are not case sensitive, cannot be a repeat of one the previous 3 passwords, and expire every 365 days (120 days for users with Financial Functions permissions).*



**Figure 5: Change Password screen(s)**

5. Click the button on the *Change Password* screen to continue with the Password Change.

*\* Note: This button may be titled “Submit” or “Change Password.”*

## Research Administration Functions

The following Research Administration functions are available to FastLane users, provided the user has the appropriate permissions.

- **Accounts Management.** The Accounts Management module consists of the FastLane user's user account and their organization information features. These features include:

User Account Features	Organization Information Features
View and Modify User Profile, Create Password, View Principal Investigator (PI) Profile, Assign User Permissions, Assign Financial Permissions	Organization Information, Request Change of Organizational Name

These features are available to users who have permissions to update user information and revise and review the organization's information. The user can request a change to the organizational name in Research Administration application.

- **Letters of Intent.** The Letters of Intent (LOI) provides a snapshot and concise summary about the goals of a forthcoming proposal project by the Sponsored Project Officer (SPO) in response to a solicitation from NSF.
- **Proposals/Supplements/File Updates/Withdrawals.** This module provides the Research Administrator the ability to review, submit, or withdraw proposals, supplements, file updates to NSF. Within the Proposals/Supplements/File Updates/Withdrawals module, the users will be able to check, edit, submit, and return to PI documents in progress as well as view and search documents submitted to NSF. Details of each type can be displayed through this section, and the entire proposal can be printed from this area.
- **Award Documents.** This function provides users with the ability to view active and expired award letters and amendments letters.
- **Forwarded/Submitted Revised Budgets.** This module provides users the ability to view the revised budgets that were forwarded by the PI or submitted by the Sponsored Projects Office (SPO). The forwarded budgets can be edited, refreshed, or submitted. All of the previously submitted revisions can be viewed and printed from this section.
- **Notifications & Requests.** This module provides users the ability to view the notifications and requests forwarded by the PI, submitted by the SPO, and view the status. From this section notifications and requests can be modified, returned to PI, submitted to NSF or deleted. Users can prepare notifications and requests.
- **Organizational Reports.** The Organizational Reports section provides the capability to list reports of active awards and proposals. The search functionality provided in this section provides users, for that organization, the ability to look for the specific information in the reports.

*Research Administration User Guide*

- **Project Reports.** The Project Report section is where the annual progress reports, final project reports, and interim reports can be accessed based on the different search criteria.
- **AOR Functions.** The AOR Functions allows the Authorized Organizational Representative to electronically sign proposals/supplements and other documents.

## In Box

The In Box (Figure 6) provides users with permissions with a direct link to current work in progress that requires the attention of the logged in user from the Research Administration homepage. Depending on his/her permissions, the user can view some or all of the following features in the inbox:

- Proposals/Supplements/Files/Updates/Withdrawals
- Forwarded/Submitted Revised Budgets
- Notifications and Request
- AOR functions
- Letters of Intent

The In Box feature also displays the number of documents available in each of these features.

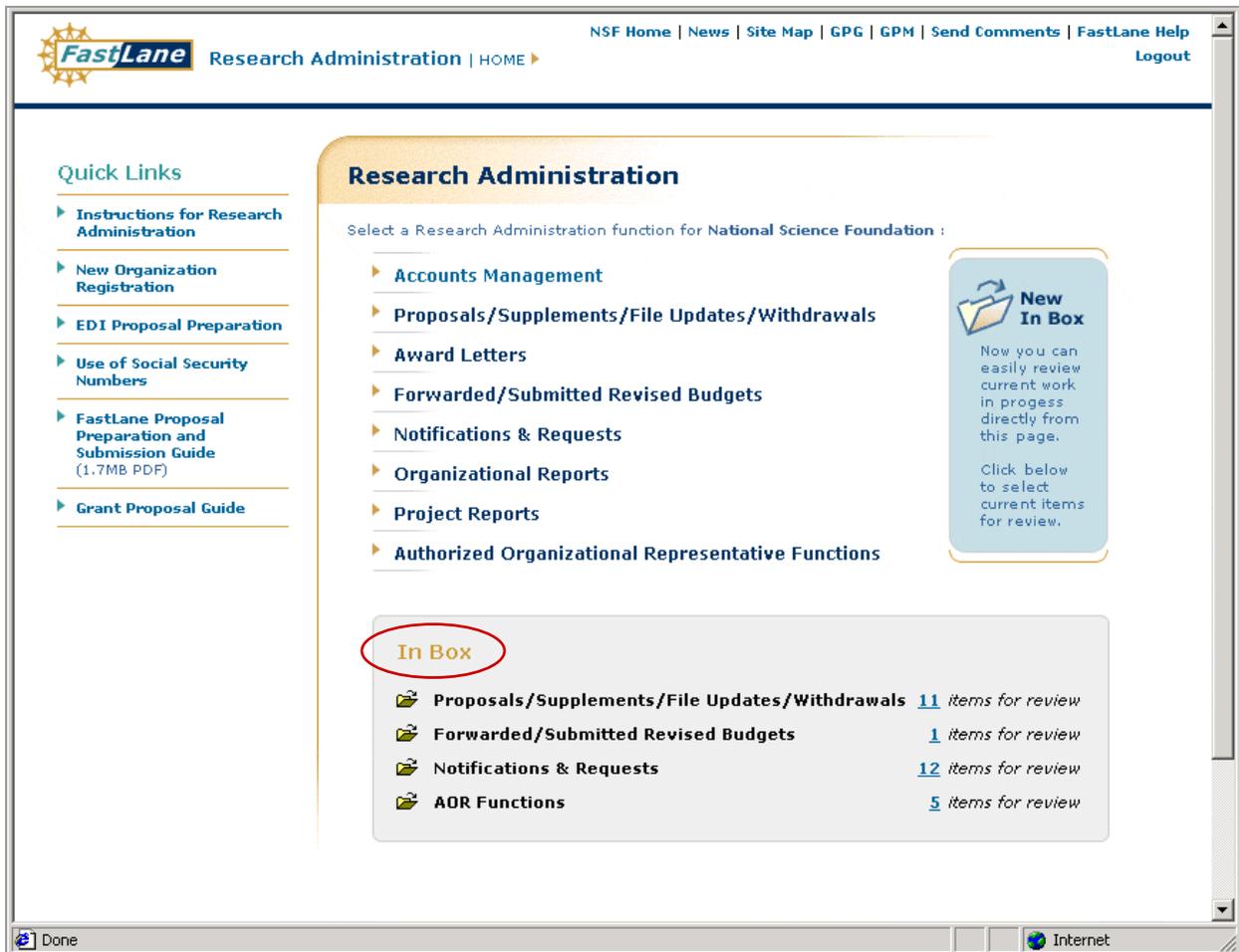


Figure 6. In Box for Research Administration

 The Folder icon is used to select the different work in progress documents through the In Box.

To access the function directly from the In Box:

*Research Administration User Guide*

1. Select  to load the corresponding function screen.

Or

2. Select the number link to access the same information.