

### 3 Accounts Management

The Accounts Management function provides users, with appropriate permissions, the ability to manage user accounts and their organization’s information. To access this function, complete the following steps:

#### User Account Management

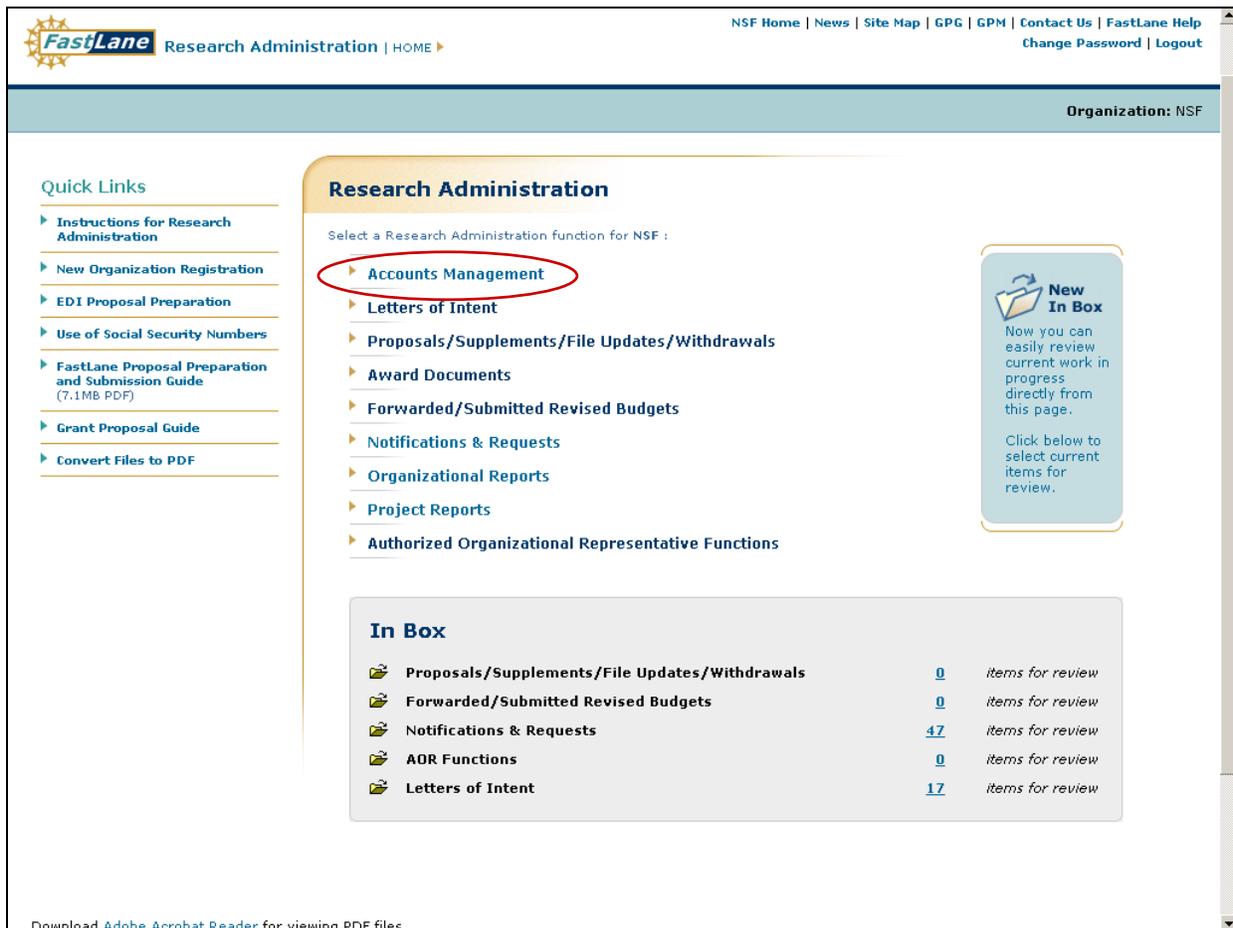


Figure 1. Research Administration Homepage screen

1. From the *Research Administration Homepage Screen* (Figure 1), the various Research Administration functions are displayed. The user can only access functions for which they have appropriate permissions. Access to Research Administration functions is dependent upon the user’s assigned permissions.
2. Click the **Accounts Management** link to access this function within Research Administration.

3. The *Accounts Management Main Screen* (Figure 2) will be displayed.

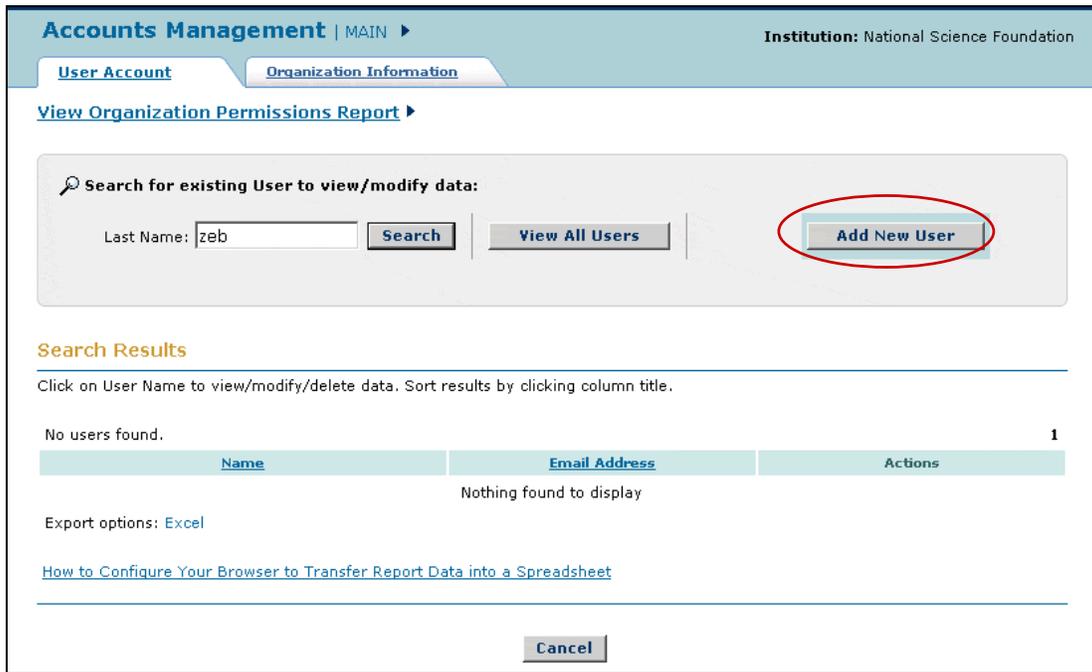


Figure 2. Accounts Management Main Screen

## Search for, Add, Modify, and Delete FastLane Users

### Search for a FastLane User

The *Accounts Management Main Screen* automatically goes to the *User Account* tab (Figure 2) allowing the user to perform a search on users associated with the designated organization. To be able to view and access the Search button, the user must have the permission to “Add, Modify, and Delete FastLane User”. There are three different ways to search for a FastLane user:

1. Enter a specific name or key text of a name in the **Last Name** field and clicking on the **Search** button. The search results will be displayed under the Search Results portion of the User Account screen.

Or

Click the **View All Users** button.

Or

Leave the Last Name field blank and click the **Search** button. The search results will be displayed under the Search Results portion of the User Account screen.

2. The search results are returned in alphabetical order by last name. The search results can be resorted by clicking on the **Name** or **Email Address** column header. The search results can also span multiple pages. The **Prev**, **Next** or numbered page links located above the **Actions** column can be used to access the other pages of search results. The search results can be exported into Microsoft Excel by clicking the **Excel** link next to the Export options label.
3. If a user is not listed in the search results, and the user would like to add a FastLane user, use the *Add a FastLane User* functionality described on Page 3-3.
4. To return to the Research Administration homepage, click on the **Cancel** button.

### **Add a FastLane User**

To be able to view and access the Add New User button, the FastLane user must have the permission to “Add, Modify and Delete FastLane User”. *It is important to verify that a user exists within the current FastLane database prior to clicking Add New User.* The following describes the process for adding a new FastLane user.

1. Click the **Add New User** button (circled in Figure 2) on the Accounts Management Main screen to access the *Add New User* function in Research Administration.
2. The *Add New User Screen* (Figure 3) will be displayed. The required data fields will have an asterisk next to text name of the field.

**Accounts Management** | MAIN ▶
Institution: SUNY at Buffalo

User Account

**Add New User**

*Required Fields are preceded by an asterisk (\*)*

Organization ID: 0028373000

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**User Profile**

Social Security Number:

\*First Name:

\*Last Name:

\*Email:

Phone Number:  10 digits only

Fax Number:  10 digits only

[Privacy Act](#)

MI:

**Create Password:**

\*Create Password:

\*Confirm Password:

[See Password Requirements](#)

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**Principal Investigator (PI) Profile**

Add User as PI

Suffix:  (Jr., Sr., III, Etc)

\*Department:

\*Degree Type:

\*Degree Year:

ORGANIZATION NAME:  
**SUNY at Buffalo**

(Once added to the NSF PI profile, the PI can change his/her address through the PI Information screen in the Proposal Preparation function.)

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**User Permissions**

- Add, Modify, and Delete FastLane Users
- Change User Permissions
- Initialize/Change User Password
- Organizational Reports
- Administer Notifications To or Requests For NSF Approvals Under Grants
- Submit Proposals/Supplements/Updates/Withdrawals to NSF
- Administer Revised Budgets
- View/Print Organization's Award Letters
- View Project Reports
- Review/Revise Organizational Information
- Authorized Organizational Representative Functions
- Financial Administrator

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**GRFP Permission** (select one only)

- Coordinating Official (Only One Per organization)
- Alternate Coordinating Official

Add User

Cancel

Figure 3. Add New User Screen

3. There are five sections within the *Add New User Screen* – User Profile, Create Password, Principal Investigator (PI) Profile, User Permissions, and GRFP Permission (for assigning Coordinating Officials for the Graduate Research Fellowship Program). Depending upon the FastLane user’s permissions, the appropriate sections will be displayed. In this example (Figure 3), the FastLane user has all the permissions to administer all User Account functions.
  
4. The FastLane user can create the user profile, request to add the user as a Principal Investigator and assign the user’s permissions. If the user does not want to use his/her own

SSN, a pseudo SSN will be generated by the FastLane system for that user. In order to create a user's password please complete the following action:

Type the password twice to ensure that the password is entered as intended. The password must be six to twenty characters long and must contain at least one alphabetic and one numeric character.

5. To add a user as a Principal Investigator, the **Add User as PI** checkbox must be selected and the Department, Degree Type and Degree Year fields must be filled in. The Degree Type and Degree Year are chosen from drop-down lists and the Department is free form text that should represent the PI's affiliation within the organization.
6. The User Permissions are for the organizational management of FastLane. Selecting the check box next to the permission description enables that permission for the user. Checks appearing in the box denote permission for that function. The Financial Administrator permission is available only to users from organizations that submit Federal Cash Transaction Reports (FCTR). GRFP Coordinating Official permissions (primary and alternative) are available to organizations that had a GRFP fellow.
7. Once all the user data has been entered, click on the **Add User** button at the bottom of the screen (circled item on Figure 3).
8. The *View Add User Profile Screen* (Figure 4) will be displayed, providing the FastLane user with an opportunity to verify that the appropriate information has been entered before submission. If you are satisfied with the information, click **Confirm Add User** (circled in Figure 4) to submit the information to the FastLane system. To return to the previous data entry screen to modify the profile, click **Cancel**.

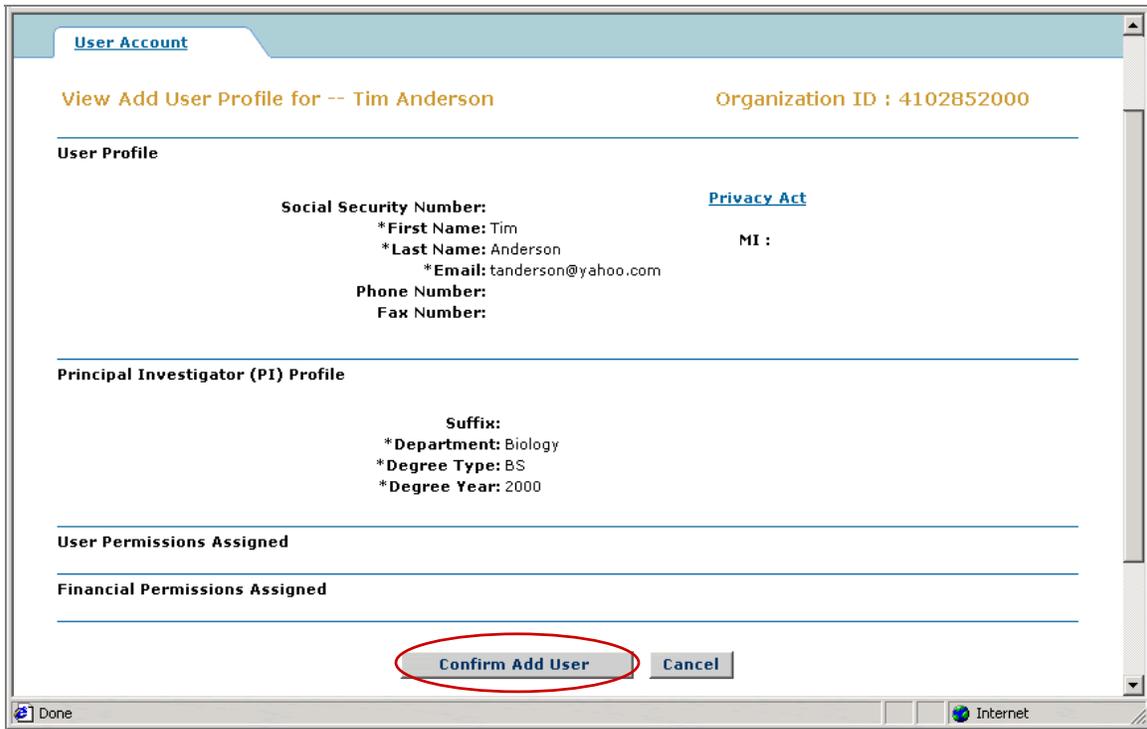


Figure 4. View Add User Profile Screen

9. *Add User Confirmation Screen* (Figure 5) will be displayed denoting that the user has been added successfully to the FastLane system.

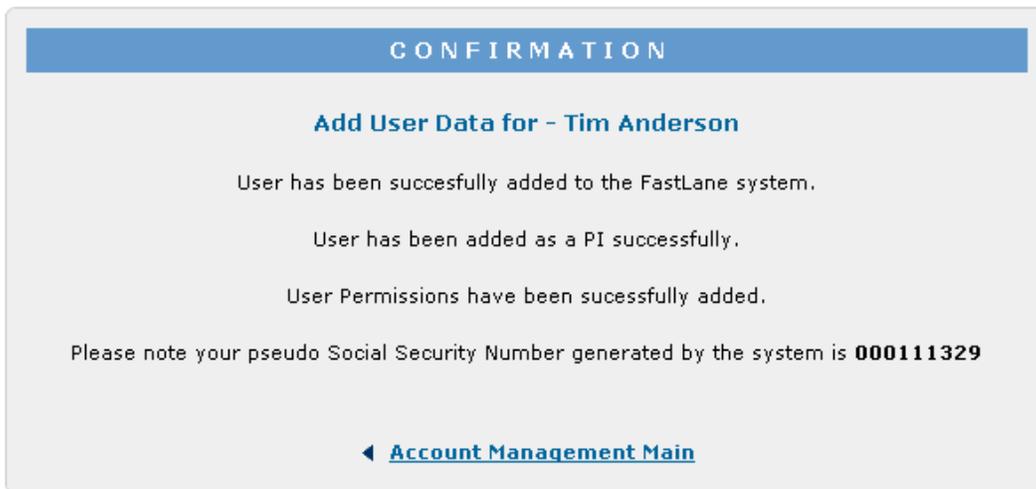
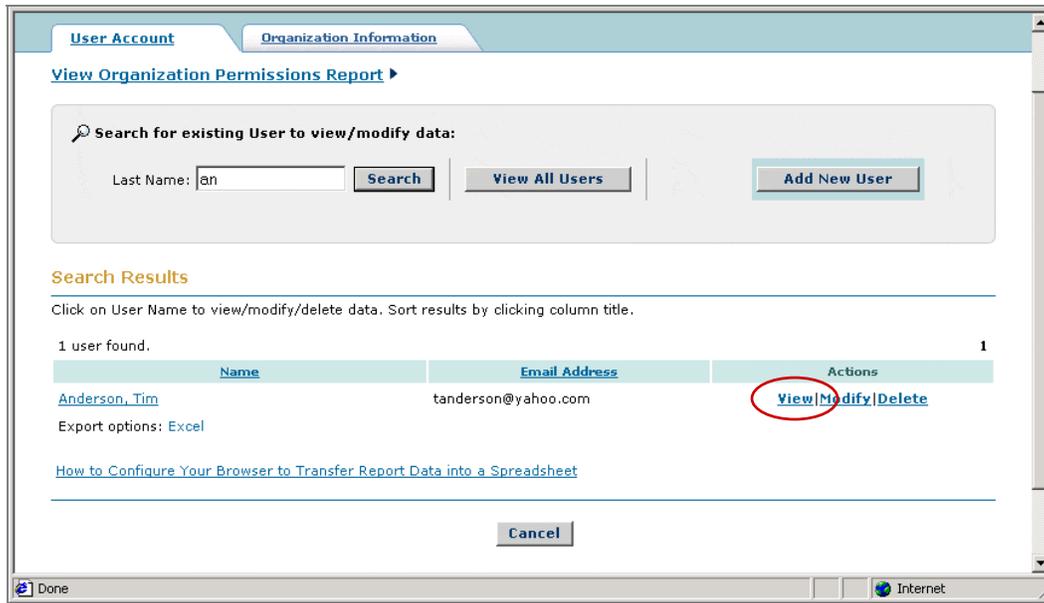


Figure 5. Add User Confirmation Screen

10. Click the **Account Management Main** link to return to the *Accounts Management Main Screen* (Figure 2).

## **Modify a FastLane User**

To be able to view and access the Modify button, the FastLane user must have the permission to “Add, Modify and Delete FastLane User”. The following describes the process for modifying a FastLane user:



**Figure 6. Search User Results Screen**

1. Modify the user profile by two methods:

Before modifications are made, the user can view the FastLane user by clicking on the user’s name link in the **Name** column or the **View** link in the **Actions** column. The *View User Profile Screen* (Figure 7) displays when either of these links is clicked. The user selects **Modify User** and the *Modify User Profile Screen* (Figure 8) appears.

Or

The user can immediately modify a user profile by clicking the **Modify** link in the **Actions** column on the *Search User Results Screen* (Figure 6).

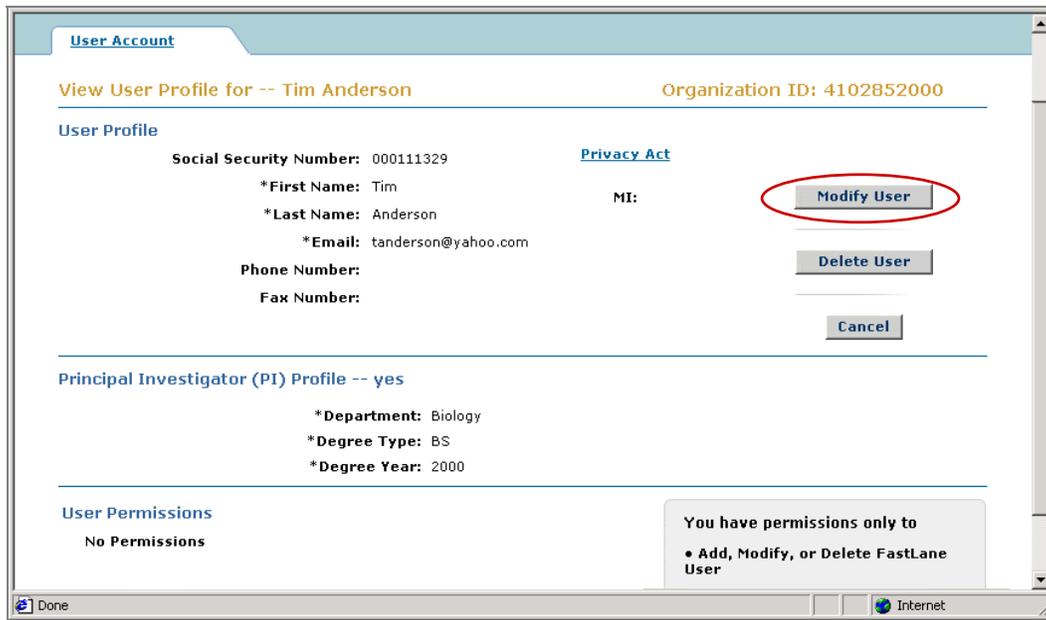
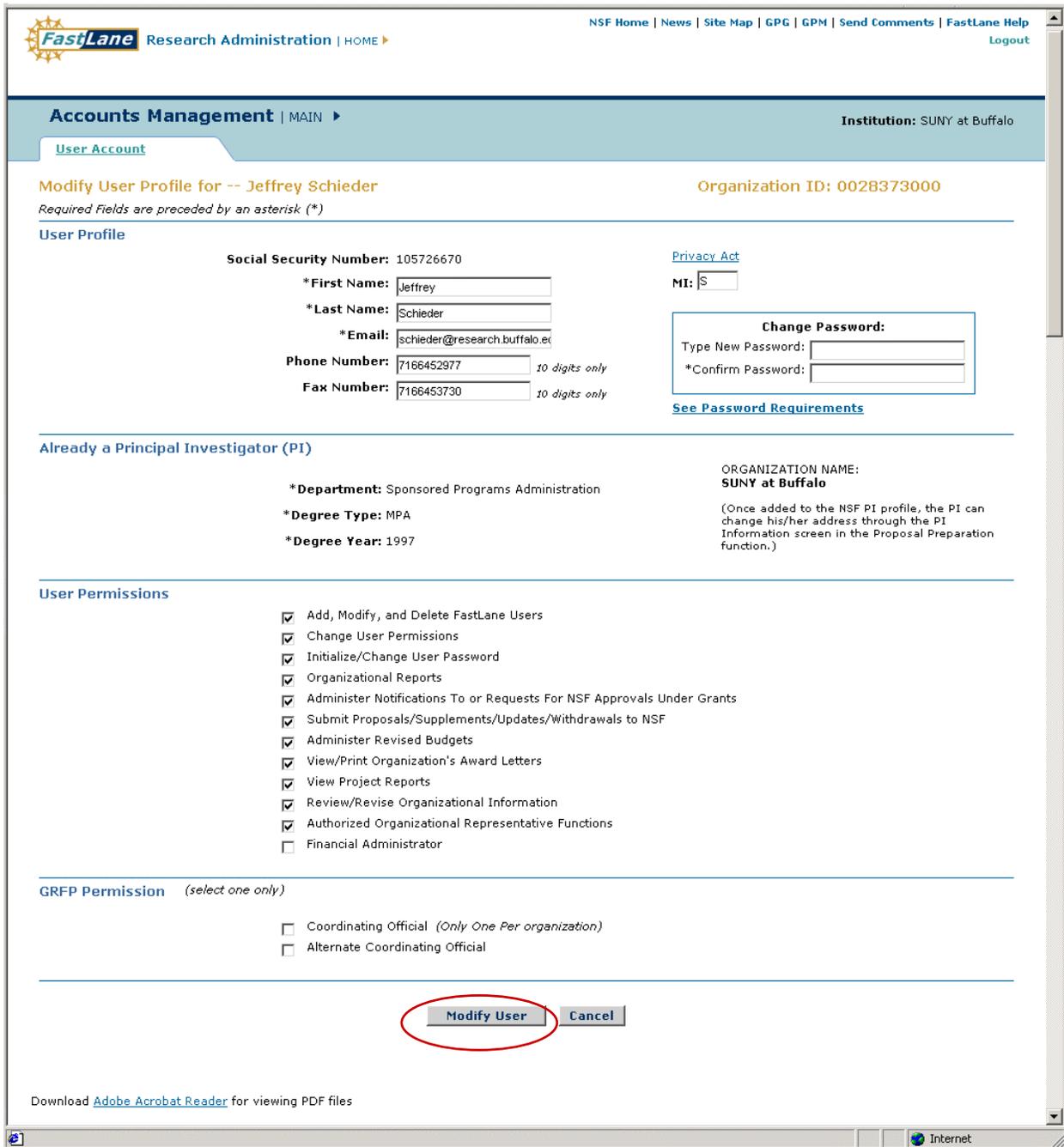


Figure 7. View User Profile Screen



**Figure 8. Modify User Profile Screen**

2. On the *Modify User Profile Screen* (Figure 8), the FastLane user can modify the user profile, add the user as a Principal Investigator, and change the user’s permissions. Change User Permissions or GRFP Permission by selecting or un-selecting check boxes next to corresponding permissions. All the fields that have an asterisk next to them are required fields. The FastLane user can also change the user’s password on this screen. To change a user’s password the following action must be completed:

Enter in the password twice to ensure that the password is entered as intended. The password must be six to twenty characters long and must contain at least one alphabetic and one numeric character.

*\* NOTE: Because an e-mail message is sent whenever a password is changed, it is extremely important to have correct e-mail addresses saved in the FastLane system.*

3. Click on the **Modify User** button at the bottom of the *Modify User Profile Screen* (circled on Figure 8). An updated View Modify User Profile Screen will be displayed (Figure 9). The **Cancel** button returns you to the *Accounts Management Main Screen* (Figure 2).

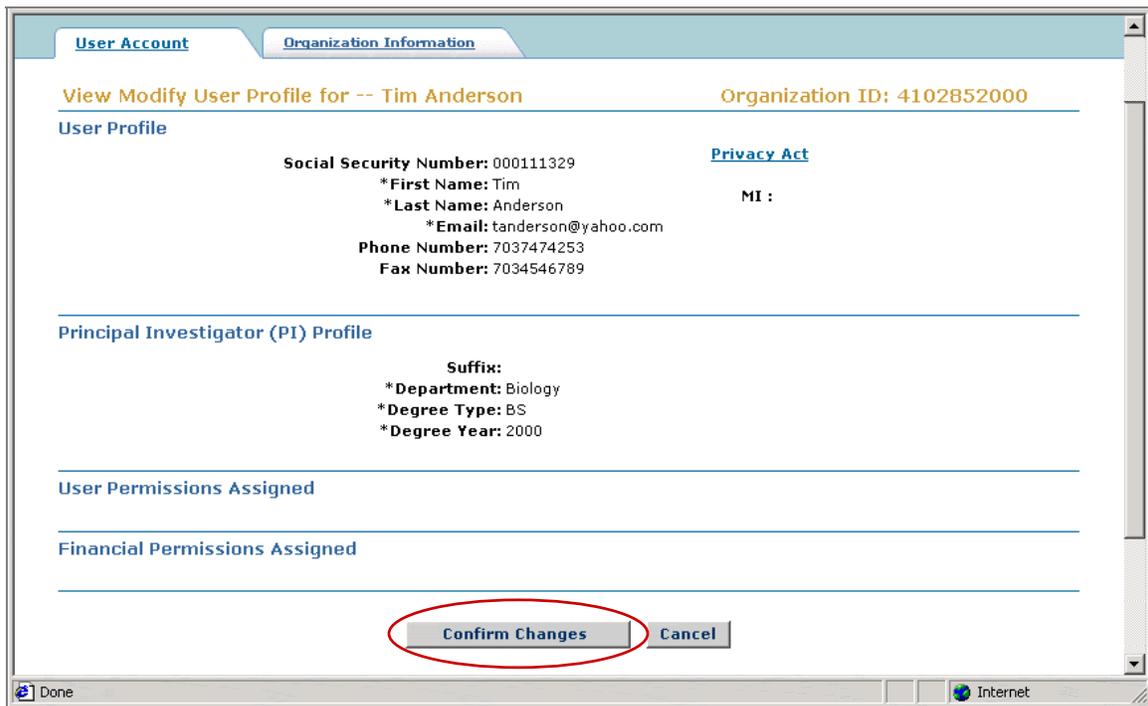


Figure 9. Updated View Modify User Profile Screen

4. Click the **Confirm Changes** button (circled in Figure 9) and the *Modify User Data Confirmation Screen* (Figure 10) will display. Clicking the **Cancel** button on the View Modify User Data screen redisplay the *Modify User Profile Screen* (Figure 8) and allows the FastLane user to make corrections to the user's information.

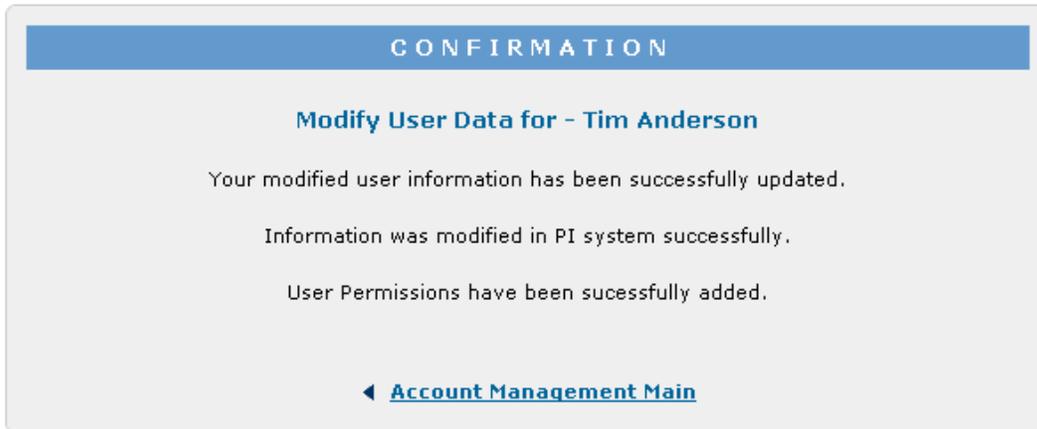


Figure 10. Modify User Data Confirmation Screen

- When the *Modify User Data Confirmation Screen* (Figure 10) displays, the user changes have been successfully updated in the FastLane system. Clicking the **Account Management Main** link displays the *Accounts Management Main Screen* (Figure 2).

**Delete a FastLane User**

To be able to view and access the Delete button, the FastLane user must have the permission to “Add, Modify and Delete FastLane User”. The following describes the process for deleting a FastLane user:

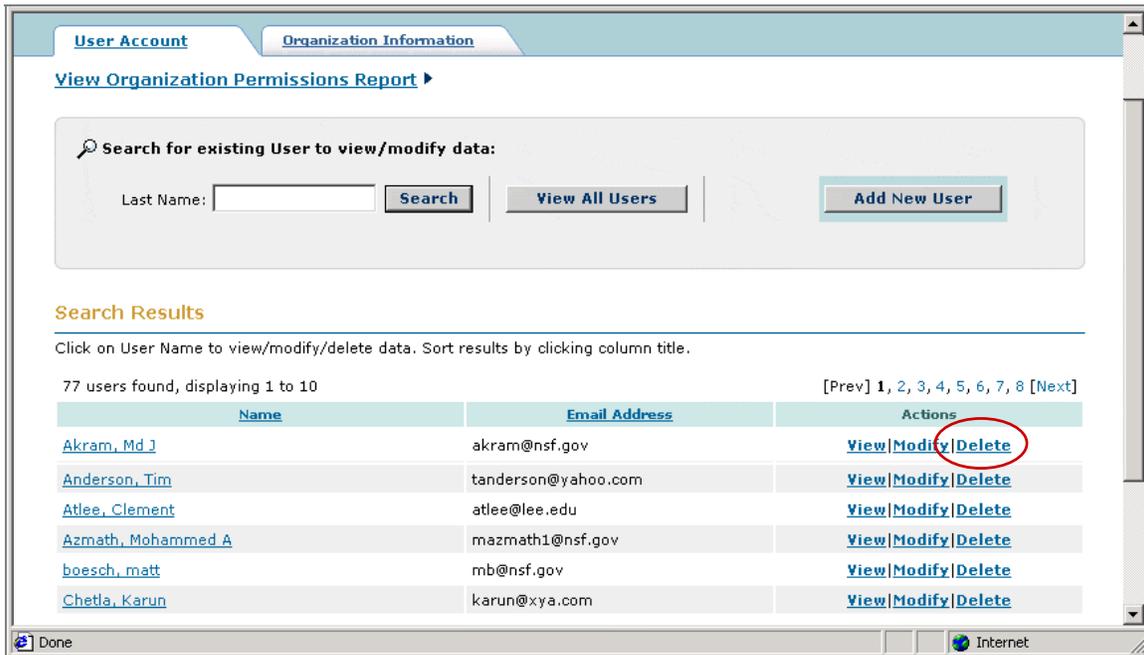


Figure 11. Search User Results Screen

1. Delete the user by two methods:

Before modifications or deletions are made, the user can view the FastLane user by clicking on the user's name link in the **Name** column or the **View** link in the **Actions** column. The *View User Profile Screen* (Figure 7) displays when either of these links is selected. The user clicks **Delete User** and the *Delete User Data Screen* (Figure 12) appears.

Or

The user can immediately delete a user profile by clicking **Delete** link in the **Actions** column on the *Search User Results Screen* (circled in Figure 11).

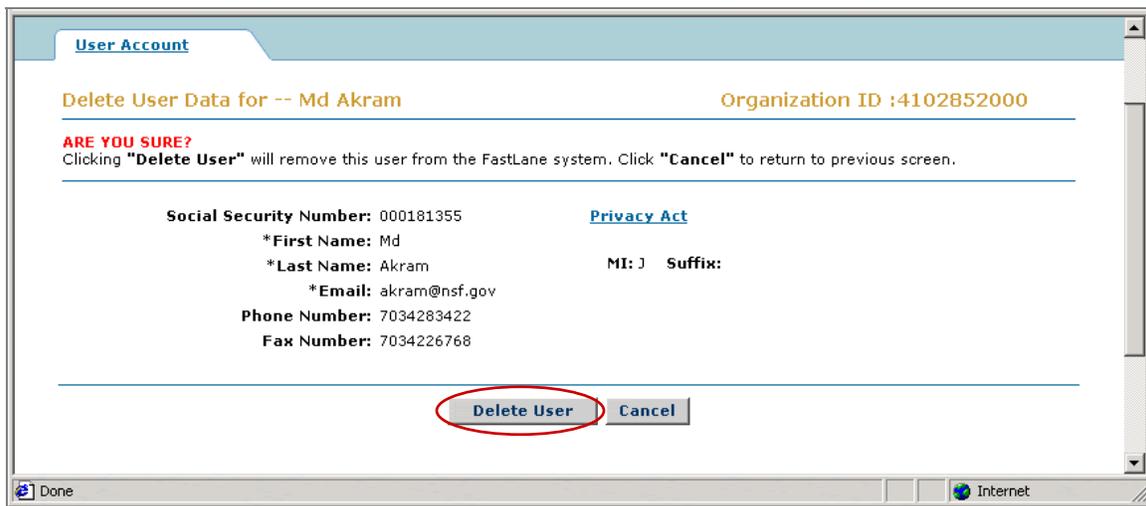


Figure 12. Delete User Data Screen

2. If the information displayed on the Delete User Data Screen (Figure 12) is correct, click Delete User. The Delete User Message Screen (Figure 13) will display. Clicking the Cancel button on the Delete User Data Screen (Figure 12) takes you back to the Search User Results Screen (Figure 11).

*\* Note: Before deleting a user that has the primary GRFP Coordinating Official (CO) permission, another user must be assigned the permission.*



**Figure 13. Delete User Message Screen**

3. When the *Delete User Data Confirmation Screen* (Figure 13) appears, the user has been successfully deleted from the FastLane system. Clicking the **Account Management Main** link displays the *Accounts Management Main Screen* (Figure 2).

## **Organizational Information**

The FastLane *Organizational Information Tab Screen* (Figure 14) displays the current profile for the organization, and the means to revise the existing organization information. This feature is available to the users who have the “Revise/Review Organization Information” permission. The Organization Name cannot be changed on this page. Please refer to the Change of Organization Name Request Section on Page 3-18.

The Fast Lane *Organizational Information Tab Screen* (Figure 14) will display a different profile for the user, depending if the user is a member of an institution that has award applications and requirements. Figure 14 displays a current profile for an institution without an award. Figure 15 displays a current profile for an institution with an award.

**NOTE:** *If your organization is not an award institution, you will not see a screen found in Figure 15. You will only see a screen found in Figure 14.*

The following actions are needed to modify organization information:

1. Modify organization information by entering the appropriate data into the corresponding fields. All required fields are labeled with an asterisk (\*).
2. Click **Submit Changes** (circled in Figure 14 for non-award institutions; circled in Figure 15 for award institutions) when all appropriate data has been entered in the fields.
3. Click **Cancel** to go back to the *Accounts Management Main Screen* (Figure 2).

**Accounts Management** | MAIN ▶ Institution: National Science Foundation

User Account **Organization Information**

**Revise Information for -- National Science Foundation**  
*\* Required Field*

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**Organization Profile**

\* **Organization Name:** NSF [Request Change of Organization Name](#)

\* **Address 1:** 4201 Wilson Boulevard

**Address 2:** Room 455

\* **City:** Arlington

\* **State:** Virginia \* **Zip:** 00567

\* **Country:** United States

\* **E-mail:** ccc@test.com

\* **Telephone Number:** 7035253466 *10 digits only*

**Fax Number:** *10 digits only*

\* **EIN/TIN:** 163466789

\* **DUNS Number:** 987654321

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Done Internet

Figure 14. Non-award Institution Organizational Information Tab Screen

**Accounts Management** | MAIN ▶ Institution: SUNY at Buffalo

User Account **Organization Information**

Revise Information for -- SUNY at Buffalo  
\* Required Field

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**Organization Profile**

\* **Organization Name:** SUNY Buffalo [Request Change of Organization Name](#)

\* **Address 1:** 501 Capen Hall

**Address 2:** \_\_\_\_\_

\* **City:** Buffalo

\* **State:** New York \* **Zip:** 142600000

\* **Country:** United States

\* **E-mail:** rschieder@research.buffalo.edu

\* **Telephone Number:** 7166452977 *10 digits only*

**Fax Number:** 7166453730 *10 digits only*

\* **EIN/TIN:** 141368361

\* **DUNS Number:** 038633251

**Award Notification Addressee:**

**Salutation:** Dr. Kaars:

**Name:** Dr. Charles J. Kaars

**Telephone Number:** 7166452977 *10 digits only*

\* **Award Letter Email Address:** awards@research.buffalo.edu

**Title:** Assistant Vice-President for Sponsored

**President/Head of Organization:**

**Name:** Prof. William R. Greiner

**Title:** President

**President phone:** 7166452901 *10 digits only*

Done Internet

**Figure 15. Award Institution Organizational Information Tab Screen**

4. A *Revise Information Confirmation Screen* (Figure 16 for non-award institutions and Figure 17 for award institutions) will be displayed with all of the new information entered on the previous screen. Click **Confirm Changes** (circled in Figure 16 and Figure 17) to submit information. A link is provided from this page to the *Request Change of Organization Name Screen* (Figure 19).
5. Click **Cancel** to go back to the *Organizational Information Tab Screen* (Figure 14 for non-award institutions or Figure 15 for award institutions)

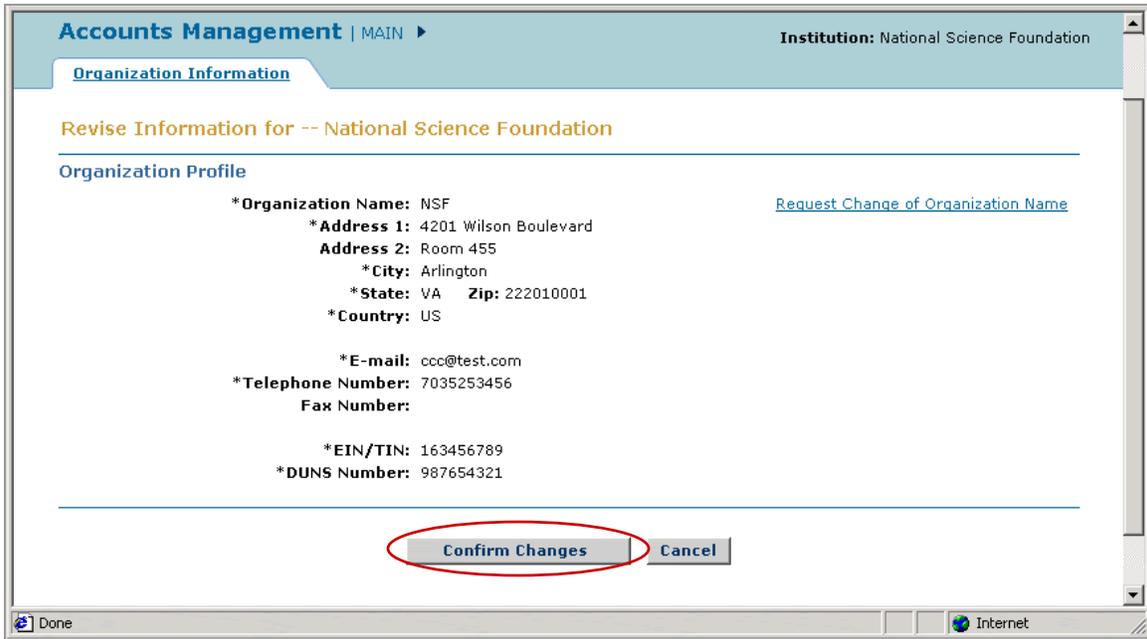


Figure 16. Revise Non-award Information Confirmation Screen

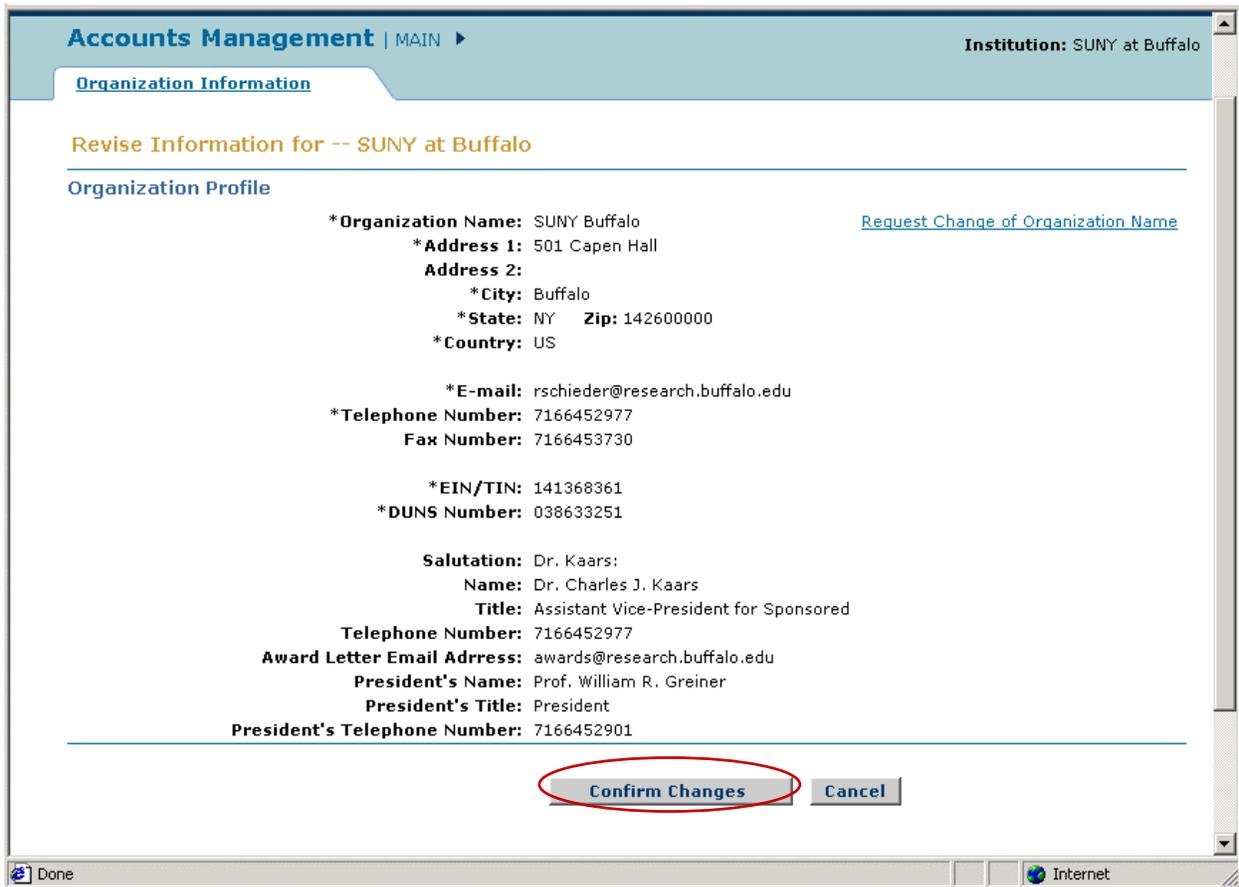


Figure 17. Revise Award Information Confirmation Screen

6. An *Updated Organization Information Confirmation Screen* (Figure 16) will load with a confirmation of changes message. This screen acknowledges the update of the organization information and appears for both award and non-award institution changes.



**Figure 18. Updated Organization Information Confirmation Screen**

## Change of Organization Name Request

The Change of Organization Name Request provides you with the means to request a new name for your organization. This ability is restricted only to users who have the “Revise/Review Organization Information” permission.

1. The following options are associated with requesting an organizational name change:
  - a. Request a Change of Organization Name
  - b. View the status of a Request for a Change Organization Name
  - c. Request a Change of Organization Name while current Organization Name Change Request is Pending

### Request a Change of Organization Name

1. From the *Organizational Information Screen* (Figure 19), click on the Request Change of Organization Name link (circled in Figure 19).

The screenshot shows the 'Organizational Information' screen for the National Science Foundation. The page title is 'Accounts Management | MAIN' and the organization is identified as 'National Science Foundation' with ID '4102852000'. The main heading is 'Revise Information for -- National Science Foundation' with a note that required fields are marked with an asterisk. The 'Organization Profile' section contains a form with the following fields: \*Organization Name (NSF), \*Address 1 (4201 Wilson Blvd.), Address 2, \*City (North Arlington), \*State (Virginia), \*Zip (222301000), \*Country (United States), \*E-mail (fastlane@nsf.gov), \*Telephone Number (7032927252), Fax Number (7032923464), \*EIN/TIN (324325436), \*DUNS Number (074811803), and DUNS Qualifier (INDV). A blue link 'Request Change of Organization Name' is located to the right of the form, circled in red.

Figure 19. Organizational Information Screen

2. The *Request Change of Organization Screen* (Figure 20) will appear.

The screenshot shows a web application interface for 'Accounts Management'. The main header indicates the user is in the 'Organization Information' section for the 'National Science Foundation' (Organization ID: 4102852000). The page title is 'Request Change of Organization Name for -- National Science Foundation'. Below the title, there is a form with several input fields: 'Organization ID: 4102852000', '\* New Name of Organization: [text box] (Legal Name of Organization)', 'Short Name: [text box]', '\* Award Letter E-mail Address: [text box]', and 'Recipient Name: [text box]'. Below these fields is an 'Additional Comments:' section with a large text area. At the bottom of the form, there are two buttons: 'Submit Request' and 'Cancel'. The 'Submit Request' button is circled in red. The browser's status bar at the bottom shows 'Done' and 'Internet'.

Figure 20. Request Change of Organization Screen

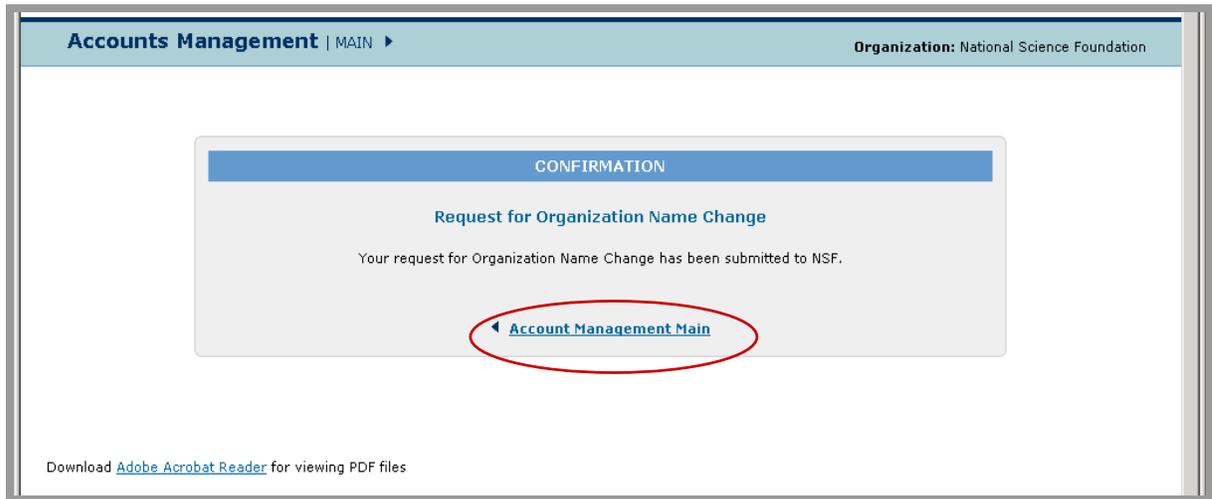
3. Modify organization information by entering the appropriate data into corresponding fields. All required fields are labeled with an asterisk (\*).

4. Click **Submit Request** (circled in Figure 20)

Or

Click **Cancel** to return to the *FastLane Organizational Information Tab Screen* (Figure 19).

5. A *Confirmation Screen* (Figure 21) will appear.



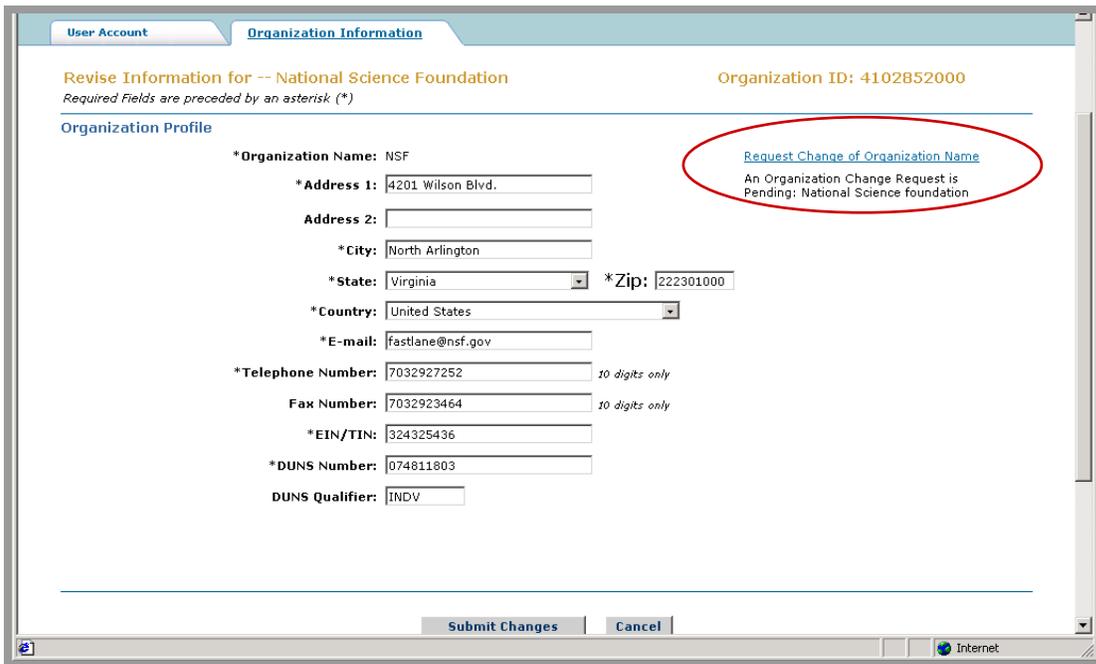
**Figure 21. Confirmation Screen**

6. Click on **Account Management Main** (circled in Figure 21) to return to the Accounts Management Main Screen (Figure 2).

**View the status of a Request for a Change Organization Name**

If you or another user in your organization with permissions has already requested for a Change Organization Name, complete the following steps:

1. From the *Organizational Information Screen* (Figure 22), view the message below the Request Change of Organization Name link to determine the status of the request (circled in Figure 22). The message will state that your last requested is pending as well as provide the organizational name in that request.



**Figure 22. Organizational Information Screen**

**NOTE:** The Message will appear only if a Change of Organization Name Request is pending. If the Message does not appear, then your organizational name is updated and your organizational information is reflecting the approved change.

2. If you wish to view further detail of the request, click on **Request Change of Organization Name** (circled in Figure 22).

3. The *Request Change of Organization Screen* (Figure 23) will appear with the fields populated of the information you included in your request as well as denote that your request is pending.

**Accounts Management** | MAIN ▶ **Organization:** National Science Foundation

**Organization Information**

**Request Change of Organization Name for -- National Science Foundation** **Organization ID:** 4102852000  
*Required Fields are preceded by an asterisk (\*) -- Prepopulated Fields denote pending request*

---

**Organization ID:** 4102852000

\* **New Name of Organization:**  ( Legal Name of Organization)

**Short Name:**

\* **Award Letter E-mail Address:**

**Recipient Name:**

**Active Awards:** no

**Additional Comments:**

asdfsdfs sfdsdfs

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**Figure 23. Request Change of Organization Screen**

4. Click **Cancel** to return to the *FastLane Organizational Information Screen* (Figure 22).

**Request a Change of Organization Name while current Organization Name Change Request is Pending**

You or another user in your organization with permissions have already requested for a Change Organization Name. There may be an interim period of time that it takes for your organizational name change request to be approved and updated. This period of time is denoted by a pending status message (circled in Figure 24). However, if you wish to request a Change Organization Name while a current Organizational Name Change Request is pending, complete the following steps:

1. From the *Organizational Information Screen* (Figure 24), click on the **Request Change of Organization Name** (circled in Figure 24).

The screenshot shows a web interface for editing organizational information. At the top, there are tabs for 'User Account' and 'Organization Information'. Below the tabs, the title is 'Revise Information for -- National Science Foundation' and the 'Organization ID: 4102852000' is displayed. A note states 'Required Fields are preceded by an asterisk (\*)'. The main section is titled 'Organization Profile' and contains a form with the following fields: '\*Organization Name: NSF', '\*Address 1: 4201 Wilson Blvd.', 'Address 2:', '\*City: North Arlington', '\*State: Virginia', '\*Zip: 222301000', '\*Country: United States', '\*E-mail: fastlane@nsf.gov', '\*Telephone Number: 7032927252 (10 digits only)', 'Fax Number: 7032923464 (10 digits only)', '\*EIN/TIN: 324325436', '\*DUNS Number: 074811803', and 'DUNS Qualifier: INDV'. A red circle highlights a message on the right side of the form: 'Request Change of Organization Name' (a blue link) and 'An Organization Change Request is Pending: National Science foundation'. At the bottom of the form are 'Submit Changes' and 'Cancel' buttons. The browser's status bar at the bottom shows 'Internet'.

**Figure 24. Organizational Information Screen**

**NOTE:** The Message will appear only if a Change of Organization Name Request is pending. If the Message does not appear, then your organizational name is updated and your organizational information is reflecting the approved change.

2. The *Request Change of Organization Screen* (Figure 25) will appear with the fields populated of the information you included in your request as well as denote that your request is pending.

The screenshot displays a web interface for 'Accounts Management'. The main header shows 'Organization: National Science Foundation'. Below this, the page title is 'Request Change of Organization Name for -- National Science Foundation' with 'Organization ID: 4102852000'. A note states: 'Required Fields are preceded by an asterisk (\*) -- Prepopulated Fields denote pending request'. The form contains the following fields: 'Organization ID: 4102852000', '\* New Name of Organization: National Science Foundation (Legal Name of Organization)', 'Short Name: NSF', '\* Award Letter E-mail Address: chajacks@att.net', 'Recipient Name: Charles Jackson', and 'Active Awards: no'. There is also an 'Additional Comments' section with a text area containing 'asdfsdfs sdfsdfs'. At the bottom, two buttons are visible: 'Submit Request' and 'Cancel', both of which are circled in red.

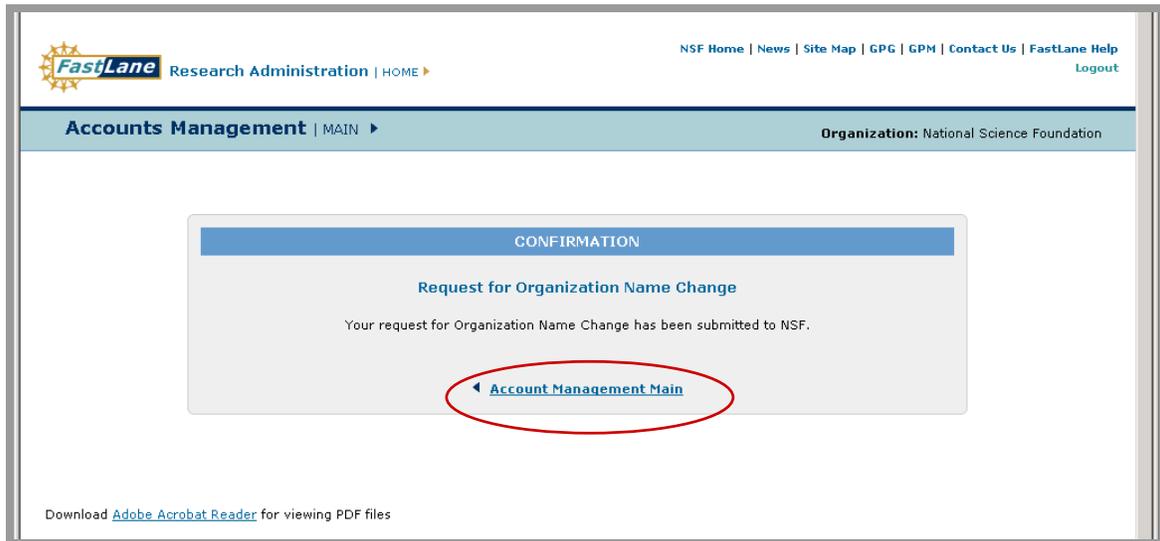
Figure 25. Request Change of Organization Screen

3. Modify organization information by entering the appropriate data into corresponding fields. All required fields are labeled with an asterisk (\*).
4. Click **Submit Request** (circled in Figure 25)

Or

Click **Cancel** to return to the *FastLane Organizational Information Screen* (Figure 24).

5. A *Confirmation Screen* (Figure 26) will appear.



**Figure 26. Confirmation Screen**

6. Click on **Account Management Main** (circled in Figure 26) to return to the Accounts Management Main Screen (Figure 2).