

**Pennsylvania Department of Transportation**  
**Grant Management System**  
**dotGrants**

**New User Activating Guide**  
**For Authorized Officials**

# Activating New User(s)

1. The Authorized Official (AO) can add people to the organization and activate them if they have registered.
2. To do this, login as the AO and click on the organization link which would be located under the "Name" column under "My Organizations" on the right side of your Main Menu.

The screenshot shows the dotGrants web application interface. At the top, there is a header with the dotGrants logo and the text 'pennsylvania PA'. On the right side of the header, it says 'User: BHSTE AO' with a 'Logout' link. Below the header is a 'Main Menu' section with a 'Show Help' button. The main content area is divided into several sections: 'MY DOCUMENTS', 'SYSTEM INFORMATION', 'MY INFORMATION', 'MY ORGANIZATIONS', and 'MY MESSAGES'. The 'MY ORGANIZATIONS' section contains a table with the following data:

Name	Role	Accounts
Agate Test	Authorized Official	<a href="#">View</a>

A red arrow points to the 'Agate Test' entry in the 'Name' column of the 'MY ORGANIZATIONS' table.

This block provides a detailed view of the 'MY INFORMATION' and 'MY ORGANIZATIONS' sections. The 'MY INFORMATION' section displays the following details:

<b>Name</b>	BHSTE AO
<b>Title</b>	login: [REDACTED]
<b>Address</b>	agate okemos, Michigan 48864
<b>Phone Number</b>	(517)555-1212
<b>Email Address</b>	me@agatesoftware.com
<b>Username</b>	[REDACTED]

Below the 'MY INFORMATION' section is a link: [View/Edit My Information](#)

The 'MY ORGANIZATIONS' section displays the following table:

Name	Role	Accounts
Agate Test	Authorized Official	<a href="#">View</a>

3. Click on the Add Members tab to view the Person Search. This located at the bottom of the page after clicking on the name of your organization.

[Main Menu](#) | **Organization Information**

[Main Menu](#) ▶

**SAVE** **ADD NOTE**

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**ORGANIZATION INFORMATION**

Name  \*

Identifier  \*

DOT Code

Address  \*

City  \* State  \* Zipcode  \*

County

Phone  \* Fax

Email

Website

[CVMU Number](#)

[Congressional Districts](#)

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**ORGANIZATION CATEGORIES**

Category	Description
<input type="checkbox"/> Airport Authority	
<input type="checkbox"/> BHSTE Municipality	
<input type="checkbox"/> BMS Municipality	
<input type="checkbox"/> County	
<input type="checkbox"/> PennDot Agency	
<input type="checkbox"/> Public Transportation	
<input type="checkbox"/> Railroad Company	
<input type="checkbox"/> Railroad User	
<input type="checkbox"/> State Agency (Non-PennDOT)	
<input type="checkbox"/> Transportation Organization	

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**ORGANIZATION MEMBERS**

1: Current Members **2: Add Members**

Person	Role	Organization Person Active Dates	System Person Active Dates	Assigned By
<input checked="" type="checkbox"/> <a href="#">8_s_test</a>	Application Administrator	10/26/2011-	5/13/2010-	AO, BHSTE
<input checked="" type="checkbox"/> <a href="#">AO, BHSTE</a>	Authorized Official	3/13/2007-	3/13/2007-	McGuire, Mike
<input checked="" type="checkbox"/> <a href="#">AppAdmin, BHSTE</a>	Application Administrator	3/10/2007-	3/10/2007-	AO, BHSTE
<input checked="" type="checkbox"/> <a href="#">Clerk, Clerk</a>	BHSTE Clerk	3/10/2007-	3/13/2007-	McGuire, Mike
<input checked="" type="checkbox"/> <a href="#">User, New</a>	Authorized Official	9/19/2011-	9/19/2011-	DeCamp, David
<input checked="" type="checkbox"/> <a href="#">User, Sample</a>	Viewer	10/24/2011-	10/24/2011-	AO, BHSTE
<input checked="" type="checkbox"/> <a href="#">User, Test</a>	Authorized Official	9/20/2011-	9/20/2011-	DeCamp, David
<input checked="" type="checkbox"/> <a href="#">User, Test</a>	Authorized Official	9/19/2011-	9/19/2011-	DeCamp, David
<input checked="" type="checkbox"/> <a href="#">Viewer, Bhste</a>	Viewer	3/10/2007-	3/10/2007-	AppAdmin, BHSTE

**SAVE** **ADD NOTE**

- Enter the partial name (either first or last) and click Search.

**Note:** If your partial name is too short, the results may be too large to display and you will receive the following error message:

You have entered a search criteria that may yield a large result. Please enter more letters to filter the returned list.

- The list of users with approved accounts matching the search criteria will then display. Users who accounts have not been approved in the system will show up in this list but they will not be able to access the system until they are approved and given a "System Person Active Date".

<input type="checkbox"/>	Person	Role	Organization Person Active Dates	System Person Active Dates	Assigned By
<input type="checkbox"/>	Adams, Mr. Michael	Authorized Official	10/27/2011-	3/13/2008-	
<input type="checkbox"/>	Balistrieri 06-428, Mrs. Michele	Authorized Official	10/27/2011-	-	
<input type="checkbox"/>	Banks, Mr. michael	Authorized Official	10/27/2011-	10/28/2008-	
<input type="checkbox"/>	Beener, Mr. Michele	Authorized Official	10/27/2011-	-	
<input type="checkbox"/>	Beener, Ms. Michele	Authorized Official	10/27/2011-	-	
<input type="checkbox"/>	Benlock, Mr. Michael	Authorized Official	10/27/2011-	8/8/2007-	
<input type="checkbox"/>	Bernhardt, Mr. Michael	Authorized Official	10/27/2011-	6/4/2009-	

- Select the person you want to add by checking the box next to their name, select their appropriate role from the Role dropdown, and enter the Active Date under "Organization Person Active Dates".

<input type="checkbox"/>	Person	Role	Organization Person Active Dates	System Person Active Dates	Assigned By
<input type="checkbox"/>	Adams, Mr. Michael	Authorized Official	10/27/2011-	3/13/2008-	
<input type="checkbox"/>	Balistrieri 06-428, Mrs. Michele	Authorized Official	10/27/2011-	-	
<input checked="" type="checkbox"/>	Banks, Mr. michael	Application Administrator	10/27/2011-	10/28/2008-	
<input type="checkbox"/>	Beener, Mr. Michele	Authorized Official	10/27/2011-	-	

**Note:** You can also set when the user will become inactive to the organization by setting the second active date.

**ORGANIZATION MEMBERS**

1: Current Members
2: Add Members

**Person Search:**

<input type="checkbox"/>	Person	Role	Organization Person Active Dates
<input type="checkbox"/>	<a href="#">Adams, Mr. Michael</a>	Authorized Official	10/27/2011 - <input type="text"/>
<input type="checkbox"/>	<a href="#">Balistrieri 06-428, Mrs. Michele</a>	Authorized Official	10/27/2011 - <input type="text"/>
<input checked="" type="checkbox"/>	<a href="#">Banks, Mr. michael</a>	Authorized Official	10/27/2011 - <span style="background-color: yellow;">10/27/2012</span>

- Click the "Save" button either in the upper left hand corner or the bottom left hand corner of the screen.

**SAVE**

**ADD NOTE**

- The selected person(s) are now added and are active within the bounds of their assigned roles. You can now view these users under the "Current Members" tab.

**ORGANIZATION MEMBERS**

1: Current Members
2: Add Members

<input type="checkbox"/>	Person	Role	Organization Person Active Dates	System Person Active Dates	Assigned By
<input checked="" type="checkbox"/>	<a href="#">B, s test</a>	Application Administrator	10/26/2011 - <input type="text"/>	5/13/2010 - <input type="text"/>	AO, BHSTE
<input checked="" type="checkbox"/>	<a href="#">AO, BHSTE</a>	Authorized Official	3/13/2007 - <input type="text"/>	3/13/2007 - <input type="text"/>	AO, BHSTE
<input checked="" type="checkbox"/>	<a href="#">AppAdmin, BHSTE</a>	Application Administrator	3/10/2007 - <input type="text"/>	3/10/2007 - <input type="text"/>	AO, BHSTE
<input checked="" type="checkbox"/>	<a href="#">Banks, Mr. michael</a>	Application Administrator	10/27/2011 - <input type="text"/>	10/28/2008 - <input type="text"/>	AO, BHSTE

## Inactivating New User(s)

1. The Authorized Official (AO) can deactivate previously added users from the organization and can also remove them completely too. Inactivating a user from your organization will just cause that user to lose access to anything within that organization until the inactive date has been removed. If you remove a user from the organization they will lose access to the organization and in order to give that user access again you would need to add that user to the organization all over again.
2. To do this, login as the AO and click on the organization link.

 **MY INFORMATION**

<b>Name</b>	BHSTE AO
<b>Title</b>	login: [REDACTED]
<b>Address</b>	agate okemos, Michigan 48864
<b>Phone Number</b>	(517)555-1212
<b>Email Address</b>	me@agatesoftware.com
<b>Username</b>	[REDACTED]

[View/Edit My Information](#)

 **MY ORGANIZATIONS**

Name	Role	Accounts
<a href="#">Agate Test</a>	Authorized Official	<a href="#">View</a>

3. Click on the "Current Members" tab to view all the current members.

 **ORGANIZATION MEMBERS**

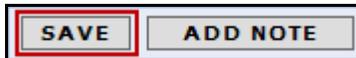
1: Current Members
2: Add Members

	Person	Role	Organization Person Active Dates	System Person Active Dates	Assigned By
<input checked="" type="checkbox"/>	<a href="#">8, s_test</a>	Application Administrator	10/26/2011 -	5/13/2010 -	AO, BHSTE
<input checked="" type="checkbox"/>	<a href="#">AO, BHSTE</a>	Authorized Official	3/13/2007 -	3/13/2007 -	[REDACTED]
<input checked="" type="checkbox"/>	<a href="#">AppAdmin, BHSTE</a>	Application Administrator	3/10/2007 -	3/10/2007 -	AO, BHSTE
<input checked="" type="checkbox"/>	<a href="#">Banks, Mr. michael</a>	Authorized Official	10/27/2011 -	10/28/2008 -	AO, BHSTE
<input checked="" type="checkbox"/>	<a href="#">Clerk, Clerk</a>	BHSTE Clerk	3/10/2007 -	3/13/2007 -	[REDACTED]
<input checked="" type="checkbox"/>	<a href="#">User, New</a>	Authorized Official	9/19/2011 -	9/19/2011 -	[REDACTED]
<input checked="" type="checkbox"/>	<a href="#">User, Sample</a>	Viewer	10/24/2011 -	10/24/2011 -	AO, BHSTE
<input checked="" type="checkbox"/>	<a href="#">User, Test</a>	Authorized Official	9/20/2011 -	9/20/2011 -	[REDACTED]
<input checked="" type="checkbox"/>	<a href="#">User, Test</a>	Authorized Official	9/19/2011 -	9/19/2011 -	[REDACTED]
<input checked="" type="checkbox"/>	<a href="#">Viewer, Bhste</a>	Viewer	3/10/2007 -	3/10/2007 -	AppAdmin, BHSTE

- Specify the date you want the person(s) inactivated in the second "Organization Person Active Dates" textbox. On the date you specified, the person(s) will no longer be active for that organization.

ORGANIZATION MEMBERS					
1: Current Members		2: Add Members			
<input type="checkbox"/>	Person	Role	Organization Person Active Dates	System Person Active Dates	Assigned By
<input checked="" type="checkbox"/>	S, s_test	Application Administrator	10/26/2011 -	5/13/2010 -	AO, BHSTE
<input checked="" type="checkbox"/>	AO, BHSTE	Authorized Official	3/13/2007 -	3/13/2007 -	AO, BHSTE
<input checked="" type="checkbox"/>	AppAdmin, BHSTE	Application Administrator	3/10/2007 -	3/10/2007 -	AO, BHSTE
<input checked="" type="checkbox"/>	Banks, Mr. michael	Authorized Official	10/27/2011 - 10/27/2011	10/28/2008 -	AO, BHSTE
<input checked="" type="checkbox"/>	Clerk, Clerk	BHSTE Clerk	3/10/2007 -	3/13/2007 -	AO, BHSTE
<input checked="" type="checkbox"/>	User, New	Authorized Official	9/19/2011 -	9/19/2011 -	AO, BHSTE

- Click the "Save" button.



**Note:** The AO will only be able to inactivate the following roles: Authorized Official, Application Administrator, Administrator/Financial Officer, Financial Officer, Grant Coordinator, Viewer, and Writer. Any other roles will have the active date fields locked and the AO will not be able to inactivate that person.

## Removing Member(s) From Organization

6. The Authorized Official (AO) can remove previously added people from the organization.
7. To do this, login as the AO and click on the organization link.

**MY INFORMATION**

<b>Name</b>	BHSTE AO
<b>Title</b>	login: [blacked out]
<b>Address</b>	agate okemos, Michigan 48864
<b>Phone Number</b>	(517)555-1212
<b>Email Address</b>	me@agatesoftware.com
<b>Username</b>	[blacked out]

[View/Edit My Information](#)

**MY ORGANIZATIONS**

Name	Role	Accounts
<a href="#">Agate Test</a>	Authorized Official	<a href="#">View</a>

8. Click on the Current Members tab to view all the current members.

**ORGANIZATION MEMBERS**

1: Current Members
2: Add Members

<input type="checkbox"/>	Person	Role	Organization Person Active Dates	System Person Active Dates	Assigned By
<input checked="" type="checkbox"/>	<a href="#">s, s_test</a>	Application Administrator	10/26/2011 -	5/13/2010 -	AO, BHSTE
<input checked="" type="checkbox"/>	<a href="#">AO, BHSTE</a>	Authorized Official	3/13/2007 -	3/13/2007 -	[blacked out]
<input checked="" type="checkbox"/>	<a href="#">AppAdmin, BHSTE</a>	Application Administrator	3/10/2007 -	3/10/2007 -	AO, BHSTE
<input checked="" type="checkbox"/>	<a href="#">Banks, Mr. michael</a>	Authorized Official	10/27/2011 -	10/28/2008 -	AO, BHSTE
<input checked="" type="checkbox"/>	<a href="#">Clerk, Clerk</a>	BHSTE Clerk	3/10/2007 -	3/13/2007 -	[blacked out]
<input checked="" type="checkbox"/>	<a href="#">User, New</a>	Authorized Official	9/19/2011 -	9/19/2011 -	[blacked out]
<input checked="" type="checkbox"/>	<a href="#">User, Sample</a>	Viewer	10/24/2011 -	10/24/2011 -	AO, BHSTE
<input checked="" type="checkbox"/>	<a href="#">User, Test</a>	Authorized Official	9/20/2011 -	9/20/2011 -	[blacked out]
<input checked="" type="checkbox"/>	<a href="#">User, Test</a>	Authorized Official	9/19/2011 -	9/19/2011 -	[blacked out]
<input checked="" type="checkbox"/>	<a href="#">Viewer, Bhste</a>	Viewer	3/10/2007 -	3/10/2007 -	AppAdmin, BHSTE

9. Uncheck the person(s) that you want to remove.

ORGANIZATION MEMBERS				
1: Current Members		2: Add Members		
<input type="checkbox"/>	Person	Role	Organization Person Active Dates	System Person Active Dates
<input checked="" type="checkbox"/>	<a href="#">8, s_test</a>	Application Administrator	10/26/2011 -	5/13/2010 -
<input checked="" type="checkbox"/>	<a href="#">AO, BHSTE</a>	Authorized Official	3/13/2007 -	3/13/2007 -
<input checked="" type="checkbox"/>	<a href="#">AppAdmin, BHSTE</a>	Application Administrator	3/10/2007 -	3/10/2007 -
<input type="checkbox"/>	<a href="#">Banks, Mr. michael</a>	Authorized Official	10/27/2011 -	10/28/2008 -
<input checked="" type="checkbox"/>	<a href="#">Clerk, Clerk</a>	BHSTE Clerk	3/10/2007 -	3/13/2007 -
<input checked="" type="checkbox"/>	<a href="#">User, New</a>	Authorized Official	9/19/2011 -	9/19/2011 -

10. Click the "Save" button.

<b>SAVE</b>	<b>ADD NOTE</b>
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11. The person(s) have now been removed from the organization.

ORGANIZATION MEMBERS				
1: Current Members		2: Add Members		
<input type="checkbox"/>	Person	Role	Organization Person Active Dates	System Person Active Dates
<input checked="" type="checkbox"/>	<a href="#">8, s_test</a>	Application Administrator	10/26/2011 -	5/13/2010 -
<input checked="" type="checkbox"/>	<a href="#">AO, BHSTE</a>	Authorized Official	3/13/2007 -	3/13/2007 -
<input checked="" type="checkbox"/>	<a href="#">AppAdmin, BHSTE</a>	Application Administrator	3/10/2007 -	3/10/2007 -
<input checked="" type="checkbox"/>	<a href="#">Clerk, Clerk</a>	BHSTE Clerk	3/10/2007 -	3/13/2007 -
<input checked="" type="checkbox"/>	<a href="#">User, New</a>	Authorized Official	9/19/2011 -	9/19/2011 -

**Note:** The AO will only be able to remove the following roles: Authorized Official, Application Administrator, Administrator/Financial Officer, Financial Officer, Grant Coordinator, Viewer, and Writer. Any other roles will have the checkbox locked and the AO will not be able to remove that person.