How Accounts are Created in eRA Commons Transcript

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Welcome to this tutorial on How Accounts are Created in eRA Commons. This video will highlight the steps a Signing Official, SO, or an Account Administrator (AA) needs to take to create a new account in eRA Commons.

With an institution successfully registered with eRA Commons, the SO can create new accounts for program directors and or principal investigators, PD-PIs, or affiliate an existing PD-PI to their institution.

When an SO goes to create a new account for a PD-PI, the very first step is to make sure the person does not already have a Commons account, regardless of the institution that created it. This is an important step because a PD-PI should only have one Commons account throughout their career as a program director and or principal investigator.

Here are the steps the SO takes to search for a PD-PI in eRA Commons.

- From within the Admin module, select the Accounts tab
- From within Accounts, select the Account Management tab. The Account Management System's Search Accounts screen will open in a new browser window.
- On the search accounts screen, be sure the checkbox for Search only within my organization is not checked. You want to search the entire Commons database for the user so that you do not create a duplicate account.
- **NOTE**: When searching outside of your organization, it is possible to exceed the maximum of 500 results that can be displayed. Make sure you have enough information from your user to do a thorough search.
- Enter the search criteria, using as much information on the user as is available to you. But remember some users may have a legal name that is different from what they use every day, for example "Bill" for "William". The percent sign (%) may be used as a wildcard for the different name fields to assist in broadening the search. So, in this example we will use TI% for the last name; K % for the first name, and J % for the middle initial.
- When done, select the Search button.

If the PD-PI is found to have a Commons account already, SO can affiliate the PD-PI to their institution. To choose this option, the SO will click the Manage Button in the Action column of the search results.

- The system will display the Manage Account screen.

- To affiliate the account, click the Affiliate button along the left side. From the AMS | Add Roles screen, select the eRA Commons roles the user needs for your institution. Using the Control key you can select a number of roles at the same time. You will see the new roles and the affiliation listed. To save the changes, click the Save button.

If no PD-PI is found through the search, the SO can now create the account by following these steps:

- Click the Create New Account button in the bottom left corner. The Create Account screen displays. The User Type should be defaulted to Commons and the Organization should default to that of your own.
- On the Create Account screen, enter the Personal Information in the appropriate fields. Note that all fields except Middle Name are required. Start with the Commons User ID. As the user id is entered, the system will confirm for you that it is available.
- Note that the user ID must be between 6 and 30 characters long and should NOT contain special characters, with the exceptions of the ampersand sign, the hyphen, the period, and the underscore. Also do not make the user ID institution specific as the PD/PI will use it through out their career.
- Enter the Contact information for the user. Last name, First Name, Middle name (this is optional) and email address.
- After entering Personal Information, you can assign a role to the account. You can select multiple roles at the same time using the control or shift keys.
- Click the Add Roles button when your selection is complete.
- If necessary, you can use the Remove button to delete unwanted roles.
- When done, click the Create button to save your changes.

A confirmation screen will be displayed, summarizing the account information.

The user will receive a confirmation email at the address provided on the Create Account screen, letting them know the account was created. In the email, they can review the details of the account.

They will then receive a second email with a temporary password so they can log into Commons, update their password, and complete their personal profile to ensure that awarding agencies have the most up to date information about the user.

A number of resources are available to you for account management.

- Register | Accounts Webpage: https://era.nih.gov/register-accounts
- Create and Edit an Account Webpage: https://era.nih.gov/register-accounts/create-and-edit-an-account.htm
- eRA Commons Online Help: https://era.nih.gov/erahelp/AMS_New/Default.htm#cshid=2
- If you still need assistance with creating an account, please contact the eRA Service Desk.
- https://grants.nih.gov/support/index.html

This concludes this tutorial on How Signing Officials Create Accounts in eRA Commons. Thank you for watching.