



H E L P D O C U M E N T A T I O N

FastLane Help System

Sponsored Project Office (SPO) Functions

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SPO Functions

Sponsored Project Office Functions Introduction

The Sponsored Project Office (SPO) representative potentially has many diverse functions. All these functions are accessed through Research Administration (see [Log In to SPO Functions](#)).

The functions you are able to carry out as an SPO depend upon the permissions that you have as a user. When you log in to Research Administration, on the **Research Administration** screen (Figure 1), you will have access only to those SPO functions for which you have permission.

Note: *If you have permission as a Financial User, to carry out financial functions, click the **Financial Functions** link on the **FastLane Home Page** screen.)*



Figure 1 Research Administration screen. This individual has user permissions for all functions carried out in Research Administration.

If you do not have permissions for a function, that function does not display when you access the **Research Administration** screen. Here is a table that maps user permissions to SPO functions.

User Permission Granted	SPO Function Listed on Research Administration Screen
Add, Modify, and Delete FastLane Users	Accounts Management (Within accounts management, you have access only to those functions for which you have permission.)
Change User Permissions	
Initialize, Change User Passwords	
Review/Revise Organizational	

Information	
Organizational Reports	Organizational Reports
Submit Proposals, Supplements, File Updates, and Withdrawals to NSF	<ul style="list-style-type: none"> • Letters of Intent • Proposals/Supplements/File Updates/Withdrawals
Administer Notifications and/Requests for NSF Approval	Notifications and Requests
Administer Revised Budgets	Forwarded/Submitted Budgets
View/Print Organization's Award Letters	Award Documents
View Project Reports	Project Reports
Authorized Organizational Representative	Authorized Organizational Representative Functions
Financial Administrator	Accounts Management

Click on a link below for instructions for that SPO function:

- [Accounts Management](#)
- [Letters of Intent](#)
- Proposals/Supplements/File Updates/Withdrawals:
 - [Work on and submit proposals](#)
 - [Withdraw a proposal](#)
 - [View and print a submitted proposal](#)
 - [Check the status of a proposal](#)
 - [Supplementary Funding Requests](#)
 - [Proposal File Updates](#)
- [Award Documents](#)
- [Check Continuation Funding Status](#)
- [Forwarded/Submitted Revised Budgets](#)
- [Notifications and Requests](#)
- [Organizational Reports](#)
- [Project Reports](#)
- [Authorized Organizational Representative Functions](#)

Log In to SPO Functions in Research Administration

1. On the **FastLane Home Page** screen (Figure 1), click **Research Administration**. The **Research Administration Login** screen displays (Figure 2).

NSF Home | News | Site Map | FastLane Help | Grants.gov Help | Contact Us

FastLane
www.fastlane.nsf.gov

FastLane is an interactive real-time system used to conduct NSF business over the Internet. FastLane is for official NSF use only. [More About FastLane...](#)

FastLane User Support (7 AM to 9 PM Eastern Time • M-F)
1-800-673-6188
FastLane Availability (recording):
1-800-437-7408

Proposals, Awards and Status | Proposal Review | Panelist Functions | **Research Administration** | Financial Functions

Honorary Awards | Graduate Research Fellowship Program | Postdoctoral Fellowships and Other Programs

Quick Link

- ▶ Registration Information
- ▶ Award Search and Funding Trends
- ▶ FastLane FAQs (Opens new Browser Window)
- ▶ Grants.gov FAQ (Opens new Browser Window)

Advisories

- 08/01/07** - FastLane changes to reduce the use of Social Security Numbers (SSNs) will be implemented on August 4, 2007.
- 07/31/07** - FastLane changes to reduce the use of Social Security Numbers (SSNs) will be implemented on August 4, 2007.
- 07/05/07** - Information on the Use of Designated Fonts in NSF Proposals (Opens new browser window)
- 06/22/07** - Starting June 23rd, NSF is making it easier for PIs to report journal publication citations as part of their

Figure 1 FastLane Home Page screen. The Research Administration link is circled.

Research Administration

Login for 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

Log In

Last Name:

NSF ID: [Privacy Act](#)

Password:

Select one:

Research Administration

Submit EDI Proposals

Log In

[Forgot Password?](#)
[Lookup NSF ID](#)

Figure 2 Research Administration Login screen. The Login box, the radio button for Research Administration, and the Login button are circled.

2. In the **Login** section (Figure 2), enter the following in the boxes for:
 - **Last Name**

- **NSF ID** (your National Science Foundation Identification number)
 - **Password**
3. Click the radio button for Research Administration (Figure 2).
 4. Click the **Login** button (Figure 2). The **Research Administration** screen displays (Figure 3), with the listing of functions for which you have permissions.
 5. Click on a function link (Figure 2) to go to that function in Research Administration:
 - [Accounts Management](#)
 - [Letters of Intent](#)
 - Proposals/Supplements/File Updates/Withdrawals—Work on:
 - Proposals
 - [Work on and submit proposals](#)
 - [Withdraw a proposal](#)
 - [View and print a submitted proposal](#)
 - [Check the status of a proposal](#)
 - [Supplementary Funding Requests](#)
 - [Proposal File Updates](#)
 - [Award Documents](#)
 - [Check Continuation Funding Status](#)
 - [Forwarded/Submitted Revised Budgets](#)
 - [Notifications and Requests](#)
 - [Organizational Reports](#)
 - [Project Reports](#)
 - [Authorized Organizational Representative Functions](#)
(Click on a link for instructions for that function.)

The **Research Administration** screen (Figure 3) also features an **In Box** that shows you how many documents are available for review in these SPO function categories:

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

Click on the number of the documents link to go to that function category.

Research Administration

Select a Research Administration function for National Science Foundation |

- 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

New In Box

Now you can easily review current work in progress directly from this page.

Click below to select current items for review.

In Box

Proposals/Supplements/File Updates/Withdrawals	<u>21</u>	Items for review
Forwarded/Submitted Revised Budgets	0	Items for review
Notifications & Requests	11	Items for review
AOR Functions	0	Items for review
Letters of Intent	0	Items for review

Figure 3 Research Administration screen. The In Box, with the number of documents waiting for attention by function category, is circled.

Accounts Management

Accounts Management Introduction

In Accounts Management, you communicate with NSF on basic information about your organization and the people in it.

In the **User Account** section, you can do the following:

- Add a user and assign the individual a password and user permissions
- View and modify the profile of an existing user, including modifying user permissions
- Delete a user
- View the Organization Permissions Report that shows the permissions for all functions and for all individuals

In the **Organization Information** section, you can do the following:

- Change your organization's name
- Revise your organization's basic contact information

See [Access Accounts Management](#) for instructions to begin working on Accounts Management.

Access Accounts Management

1. Access the **Research Administration** screen (Figure 1) (see [Log In to SPO Functions](#)).



Figure 1 Research Administration screen. The Accounts Management link is circled.

2. On the **Research Administration** screen (Figure 2), click **Accounts Management** (Figure 1). The **Accounts Management** screen displays on the **User Account** tab (Figure 2) at first without any listing of users. You have these immediate options on the **Accounts Management** screen:

- [Search for a user](#)
- [View all users](#)
- [Add a user](#)
- [View an Organization Permissions Report](#)

Once a listing of users displays on the screen, you have these additional options:

- [View a user profile](#)
- [Modify a user's information or permissions](#)
- [Delete a user](#)

(Click on a link above for instructions for that option.)



Figure 2 Accounts Management screen.

Search for a User

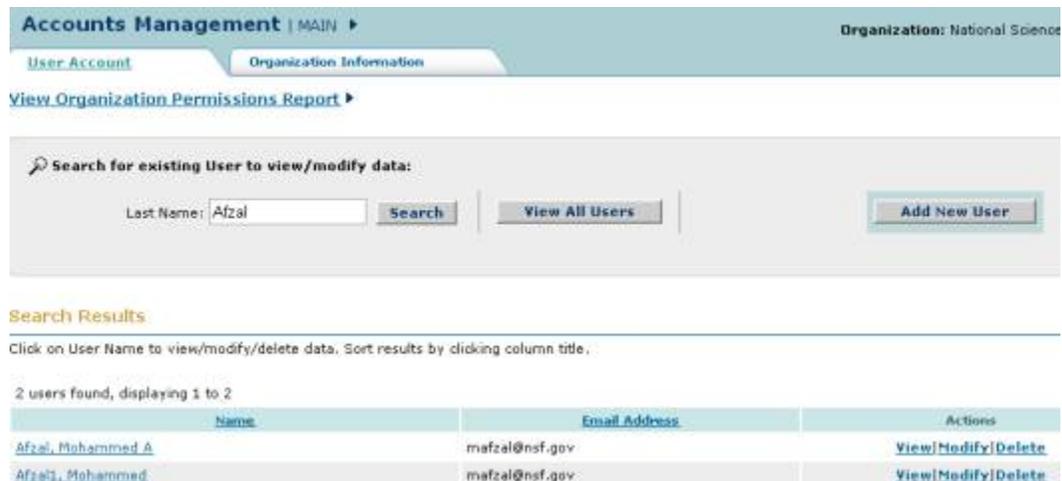
1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see [Access Accounts Management](#)).



The screenshot shows the 'Accounts Management' interface with the 'User Account' tab selected. The 'Organization' is 'National Science Foundation'. Below the navigation tabs, there is a search section titled 'Search for existing User to view/modify data:'. It includes a text input field for 'Last Name' containing 'Afzal', a 'Search' button (circled in red), a 'View All Users' button, and an 'Add New User' button. Below this is a table with columns for 'Name', 'Email Address', and 'Actions'.

Figure 1 Accounts Management screen. The Search button is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), in the **Search for Existing User to View/Modify Data** section, type the last name of the user in the **Last Name** box.
3. Click the **Search** button (Figure 1). The **Accounts Management** screen displays (Figure 2) with the user listed in the **Search Results** section. For the user, you have these options for action:
 - [View the information and permissions for a user](#)
 - [Modify a user's information or permissions](#)
 - [Delete a user](#)
 (Click on a link above for instructions for that option.)



The screenshot shows the 'Accounts Management' interface after a search. The 'Last Name' field contains 'Afzal' and the 'Search' button has been clicked. Below the search section, there is a 'Search Results' section with a table listing the search results. The table has columns for 'Name', 'Email Address', and 'Actions'.

Name	Email Address	Actions
Afzal, Mohammed A	mafzal@nsf.gov	View Modify Delete
Afzal, Mohammad	mafzal@nsf.gov	View Modify Delete

Figure 2 Accounts Management screen with the user's name, email address, and options for action in the Search Results section.

View All Users

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see [Access Accounts Management](#)).



Figure 1 Accounts Management screen. The View All Users button is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click the **View All Users** button. The **Accounts Management** screen displays (Figure 2) with a listing of all the users in your organization in the **Search Results** section. For any user listed, you have these options:
 - [View the information and permissions for a user](#)
 - [Modify a user's information or permissions](#)
 - [Delete a user](#)
 (Click on a link above for instructions for that option.)

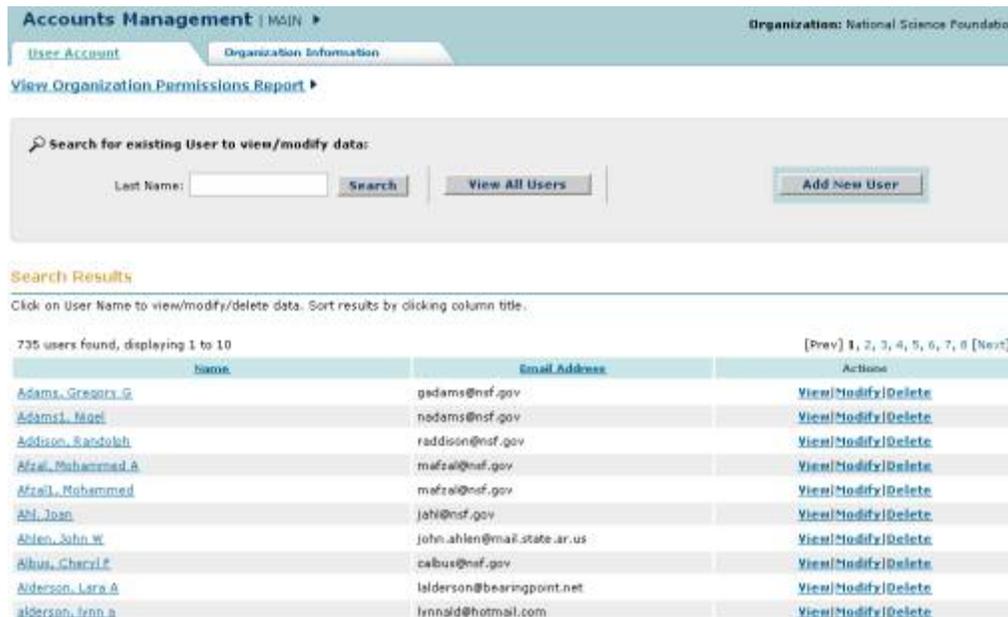


Figure 2 Accounts Management screen with all the users of your organization listed in the Search Results section.

View a User Profile

1. Access the **Accounts Management** screen on the **User Account** tab with a user name in the **Search Results** section (Figure 1) (see [Search for a User](#) or [View All Users](#)).

Accounts Management | MAIN ▶ Organization: National Science Foundation

User Account Organization Information

[View Organization Permissions Report ▶](#)

Search for existing User to view/modify data:

Last Name:

Search Results

Click on User Name to view/modify/delete data. Sort results by clicking column title.

484 users found, displaying 1 to 10 [Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next]

Name	Email Address	Actions
Addison, Randolph	raddison1@nsf.gov	View Modify Delete
Ahl, Joan	jahl@nsf.gov	View Modify Delete
Alan, John A	jalan@nsf.gov	View Modify Delete

Figure 1 Accounts Management screen. The View link is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click **View** on the row for the user whose profile you want to view. The **View User Profile** screen displays (Figure 2) with the individual's profile. The **View User Profile** screen also shows your own SPO permissions. You have these options on this screen:
 - [Modify the user profile](#)
 - [Delete the user](#)

View User Profile for -- John Alan **Organization ID: 4102852000**
Required Fields are preceded by an asterisk ()*

User Profile

NSF ID: 000865319	Privacy Act	Modify User
*First Name: John	MI: A	Delete User
*Last Name: Alan		Cancel
*Email: jalan@nsf.gov		
Phone Number: 7035551000		
Fax Number: 7035550000		

Principal Investigator (PI) Profile -- no

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

alphaman , Alan has permissions only to

- Add, Modify, or Delete FastLane User
- Change user permissions
- Change user password

To change user privileges Use **Modify User** button.

Figure 2 View User Profile screen. Modify User button is circled.

Modify the User Profile

1. On the **View User Profile** screen (Figure 2), click the **Modify User** button. The **Modify User Profile** screen displays (Figure 3).

Modify User Profile for -- John Alan **Organization ID: 4102852000**

Required Fields are preceded by an asterisk ()*

User Profile

NSF ID: 000865319

*First Name:

*Last Name:

*Email:

Phone Number: 10 digits only

Fax Number: 10 digits only

[Privacy Act](#)

MI:

Change Password:

Type New Password:

*Confirm Password:

[Password Requirements](#)

Principal Investigator (PI) Profile

Add User to PI profile

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

Department:

*Degree Type:

*Degree Year:

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

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

Figure 3 Modify User Profile screen. The Modify User button is circled.

2. Modify the user profile as you require (see [Add a User](#), Step 3 through Step 8 for instructions on the different sections of the user profile).
3. Click the **Modify User** button (Figure 3). The **View Modify User Profile** screen displays (Figure 4).

View Modify User Profile for -- John Alan **Organization ID: 4102852000**

Required Fields are preceded by an asterisk (*)

User Profile

NSF ID: 000865319 [Privacy Act](#)

*First Name: John MI :A

*Last Name: Alan

*Email: jalan@nsf.gov

Phone Number: 7035551000

Fax Number: 7035550000

Principal Investigator (PI) Profile

Suffix:

Department:

*Degree Type:

*Degree Year: 0

User Permissions Assigned

- 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

[Confirm Changes](#)

Figure 4 View Modify User Profile screen. The Confirm Changes button is circled.

4. Click the **Confirm Changes** button (Figure 4). The **Confirmation** screen displays (Figure 5).

CONFIRMATION

Modify User Data for - John Alan

Your modified user information has been successfully updated.

User Permissions changes have been successfully updated.

[← Account Management Main](#)

Figure 5 Confirmation screen. The Account Management Main link is circled.

5. Click **Account Management Main** (Figure 5). The **Accounts Management** screen displays on the **User Account** tab.

Delete the User

1. On the **View User Profile** screen (Figure 6), click the **Delete User** button. The **Delete User Data** screen displays (Figure 7) with a message for you to confirm that you want to delete the user.

View User Profile for -- John Alan **Organization ID: 4102852000**
Required Fields are preceded by an asterisk ()*

User Profile

NSF ID: 000865319 [Privacy Act](#)

*First Name: John MI: A

*Last Name: Alan

*Email: jalan@nsf.gov

Phone Number: 7035551000

Fax Number: 7035550000

Principal Investigator (PI) Profile -- no

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

alphaman , Alan has permissions only to

- Add, Modify, or Delete FastLane User
- Change user permissions
- Change user password

To change user privileges Use Modify User button.

Figure 6 View User Profile screen. The Delete User button is circled.

Delete User Data for -- John Alan **Organization ID :4102852000**
Required Fields are preceded by an asterisk ()*

ARE YOU SURE?
Clicking "**Delete User**" will remove this user from the FastLane system. Click "**Cancel**" to return to previous screen.

NSF ID: 000482002 [Privacy Act](#)

*First Name: John MI: A Suffix:

*Last Name: Alan

*Email: jalan@nsf.gov

Phone Number: 7035551000

Fax Number: 7035550000

Figure 7 Delete User Data screen. The Delete User button is circled.

2. Click the **Delete User** button (Figure 7). The **Confirmation** screen displays (Figure 8) with the message that the individual is deleted as a user of your organization.

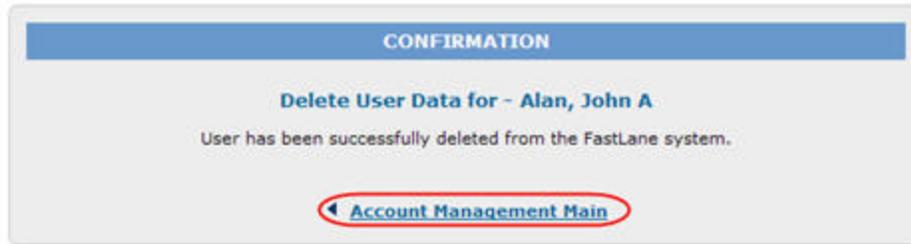


Figure 8 Confirmation screen. The Account Management Main link is circled.

3. Click **Account Management Main** (Figure 8). The **Accounts Management** screen displays on the **User Account** tab.

Add a User

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see [Access Accounts Management](#)).

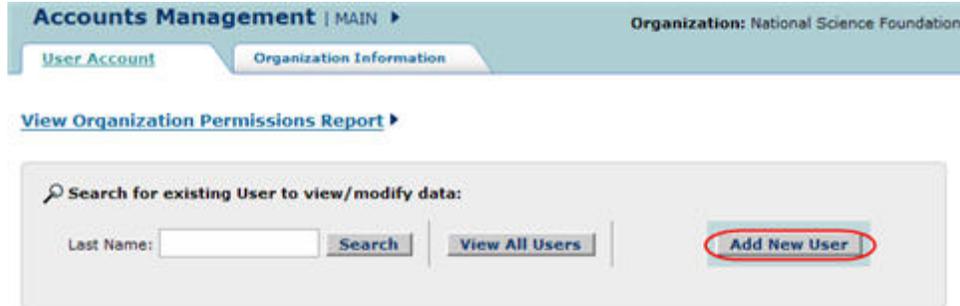


Figure 1 Accounts Management screen. The Add New User button is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click the **Add New User** button. The **Add New User** screen displays (Figure 2).

[User Account](#)

Add New User **Organization ID: 000000000**

Enter the user's NSF ID if known. Leave the field blank for the system to generate a new NSF ID.
Required fields are preceded by an asterisk (*)

User Profile

NSF ID:

*First Name:

*Last Name:

*Email:

Phone Number: 10 digits only

Fax Number: 10 digits only

[Privacy Act](#)
MI:

Create Password:

*Create Password:

*Confirm Password:

[Password Requirements](#)

Principal Investigator (PI) Profile

Add User as PI

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

Department:

*Degree Type: v

*Degree Year: v

ORGANIZATION NAME:
Carnegie-Mellon University

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

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

Financial Permissions

- Federal Cash Transaction Report
- Financial Report Certifier
- Cash Request
- Cash Request History
- Grantee EFT Certifier
- Grantee EFT Preparer
- Grantee EFT History

GRFP Permission (select one only)

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

Figure 2 Add New User screen. The Add User as PI check mark box and the Add User button are circled.

3. In the **User Profile** section (Figure 2), do the following:
 - In the **NSF ID** box, type the new user's NSF ID if known (optional). *(If you do not know the user's NSF ID, or the individual is a new FastLane user, leave the box blank and system will provide an NSF ID.)*
 - In the **First Name** box, type the user's first name.

- In the **Last Name** box, type the user's last name.
 - In the **Email** box, type the user's correct email address.
 - In the **Phone Number** box, type the user's phone number (optional).
 - In the **Fax Number** box, type the user's fax number (optional).
4. In the **Create a Password** section (Figure 2), create a password for the new user (a password must be 6 to 20 characters and have 1 alpha and 1 numeric character):
 - In the **Create a Password** box, type a password.
 - In the **Confirm Password** box, type the password again.
 5. *If the new user will be preparing proposals and functioning as the Principal Investigator*, complete the **Principal Investigator (PI) Profile** section (Figure 2):
 - Click the **Add as a PI** check mark box.
 - In the **Suffix** box, type any suffix for the individual (optional).
 - Select a department from the **Department** drop-down list (optional).
 - Select a degree type from the **Degree** drop-down list.
 - Select a degree year from the **Degree Year** drop-down list.

Note: PIs do not require user permissions for Research Administration to conduct their work as a PI. PIs work in the Proposals, Awards, and Status application of FastLane.

6. In the **User Permissions** section (Figure 2), click the check mark box for any permission that you want to assign to the new user.

Note: The permissions that display depend upon the type of your organization registered with NSF. Financial Administrator permissions are available to all organizations that submit Federal Cash Transaction Reports (FCTRs). GRFP permissions display only for FastLane users (with applicable permissions) that are members of organizations that have active GRFP Fellows. The following conditions apply in assigning GRFP permissions:

- You are required to assign one user (either new or existing) as a (primary) GRFP Coordinating Official (CO). If you have this responsibility in multiple organizations, you are required to choose one (primary) CO for each organization.
- Alternate CO permissions can be granted to any number of users, but only one user can be granted the (primary) CO permission for each organization.
- To remove a user with (primary) CO permission, another user must be assigned as (primary) CO first. Then the previous (primary) CO can be removed from the user or permission list.

Note: *If the same person in your organization is to both submit and also sign proposals and other documents that require electronic signature, you must give that person the permissions both for Submit Proposals/Supplements/Updates/Withdrawals to NSF and for Authorized Organizational Representative Functions.*

7. *If you have the Financial Administrator permission*, the **Financial Permissions** section displays on the **Add New User** screen (Figure 2). Click on a check mark box for any of the financial permissions you are granting the new user (see the Financial Functions User Guide for more details.)

8. If the **GRFP Permission** section displays (Figure 2), click on a check mark box if you want to give the new user a GRFP permission. See Note above for conditions for applying permissions for GRFP.
9. Click the **Add User** button (Figure 2). The **View Add User Profile** screen displays (Figure 3) with the profile information and permissions of the new user.

View Add User Profile for -- John Alan **Organization ID : 4102852000**
Required Fields are preceded by an asterisk ()*

Please Note: This user's account will also be added to Research.gov. All applicable FastLane permissions will also be assigned to the user's account in Research.gov.

User Profile [Privacy Act](#)

***First Name:** John
***Last Name:** Alan **MI :**A
***Email:** jalan@nsf.gov
Phone Number: 7035551000
Fax Number: 7035550000

Principal Investigator (PI) Profile

Suffix:
Department:
***Degree Type:** BS
***Degree Year:** 1969

User Permissions Assigned

- 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

Figure 3 View Add User Profile screen. The Confirm Add User button is circled.

10. Click the **Confirm Add User** button (Figure 3). The **Confirmation** screen displays (Figure 4).

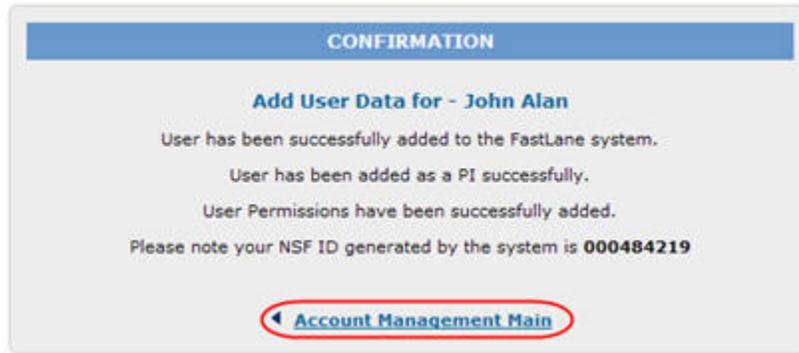


Figure 4 Confirmation screen. The **Account Management Main** link is circled.

11. Click **Account Management Main** (Figure 4). The **Accounts Management** screen displays on the **User Account** tab (Figure 1).

Modify a User Profile

1. Access the **Accounts Management** screen on the **User Account** tab with a user name in the **Search Results** section (Figure 1) (see [Search for a User](#) or [View All Users](#)).

The screenshot shows the 'Accounts Management' interface for the 'National Science Foundation' organization. It features a search bar with a 'Search' button, a 'View All Users' button, and an 'Add New User' button. Below the search bar, there is a 'Search Results' section with a table of users. The table has columns for 'Name', 'Email Address', and 'Actions'. The 'Modify' link in the 'Actions' column for the user 'Alan, John A' is circled in red.

Name	Email Address	Actions
Addison, Randolph	raddison1@nsf.gov	View Modify Delete
Ahl, Joan	jahl@nsf.gov	View Modify Delete
Alan, John A	jalan@nsf.gov	View Modify Delete

Figure 1 Accounts Management screen. The Modify link is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click **Modify** on the row for the user whose profile you want to modify. The **Modify User Profile** screen displays (Figure 2).

Modify User Profile for -- John Alan **Organization ID: 4102852000**

Required Fields are preceded by an asterisk ()*

User Profile

NSF ID: 000865319

*First Name:

*Last Name:

*Email:

Phone Number: 10 digits only

Fax Number: 10 digits only

[Privacy Act](#)

MI:

Change Password:

Type New Password:

*Confirm Password:

[Password Requirements](#)

Principal Investigator (PI) Profile

Add User to PI profile

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

Department:

*Degree Type:

*Degree Year:

ORGANIZATION NAME:
National Science Foundation

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

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

Figure 2 Modify User Profile screen. The Modify User button is circled.

3. Modify the user profile as you require (see [Add a User](#), Step 3 through Step 8 for instructions on the different sections of the user profile).
4. Click the **Modify User** button (Figure 2). The **View Modify User Profile** screen displays (Figure 3).

View Modify User Profile for -- John Alan **Organization ID: 4102852000**
Required Fields are preceded by an asterisk (*)

Please Note: This user's account will also be updated in Research.gov. All applicable Fastlane permissions will also be updated to the user's account in Research.gov.

User Profile

[Privacy Act](#)

NSF ID: 000484245
*First Name: John
*Last Name: Alan
*Email: jalan@nsf.gov
Phone Number: 7035551000
Fax Number: 7035550000

MI :A

Principal Investigator (PI) Profile

Suffix:
Department:
*Degree Type: BS
*Degree Year: 1969

User Permissions Assigned

- 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

[Confirm Changes](#)

Figure 3 View Modify User Profile screen. The Confirm Changes button is circled.

5. Click the **Confirm Changes** button (Figure 3). The **Confirmation** screen displays (Figure 4).

CONFIRMATION

Modify User Data for - John Alan

Your modified user information has been successfully updated.
User Permissions changes have been successfully updated.

[Account Management Main](#)

Figure 4 Confirmation screen. The Account Management Main link is circled.

pd_spo_functions

6. Click **Account Management Main** (Figure 4). The **Accounts Management** screen displays on the **User Account** tab.

Delete a User

1. Access the **Accounts Management** screen on the **User Account** tab with a user name in the **Search Results** section (Figure 1) (see [Search for a User](#) or [View All Users](#)).

Accounts Management | MAIN ▶ Organization: National Science Foundation

User Account Organization Information

[View Organization Permissions Report ▶](#)

Search for existing User to view/modify data:

Last Name:

Search Results

Click on User Name to view/modify/delete data. Sort results by clicking column title.

484 users found, displaying 1 to 10 [Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next]

Name	Email Address	Actions
Addison, Randolph	raddison1@nsf.gov	View Modify Delete
Ahl, Joan	jahl@nsf.gov	View Modify Delete
Alan, John A	jalan@nsf.gov	View Modify Delete

Figure 1 Accounts Management screen. The Delete link is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click **Delete** on the row for the user you want to delete. The **Delete User Data** screen displays (Figure 2) with a message for you to confirm that you want to delete the user.

Delete User Data for -- John Alan Organization ID :4102852000

Required Fields are preceded by an asterisk (*)

ARE YOU SURE?
Clicking "Delete User" will remove this user from the FastLane and Research.gov systems. Click "Cancel" to return to previous screen.

NSF ID: 000484219 [Privacy Act](#)

*First Name: John
*Last Name: Alan
*Email: jalan@nsf.gov
Phone Number: 7035551000
Fax Number: 7035550000

Figure 2 Delete User Data screen. The Delete User button is circled.

3. Click the **Delete User** button (Figure 2). The **Confirmation** screen displays (Figure 3) with the message that the individual has been deleted as a user from your organization.

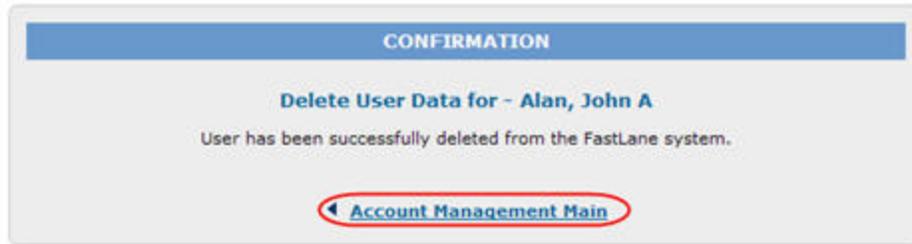


Figure 3 Confirmation screen. The Account Management Main link is circled.

4. Click **Account Management Main** (Figure 3). The **Accounts Management** screen displays on the **User Account** tab.

View the Organization Permissions Report

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see [Access Accounts Management](#)).

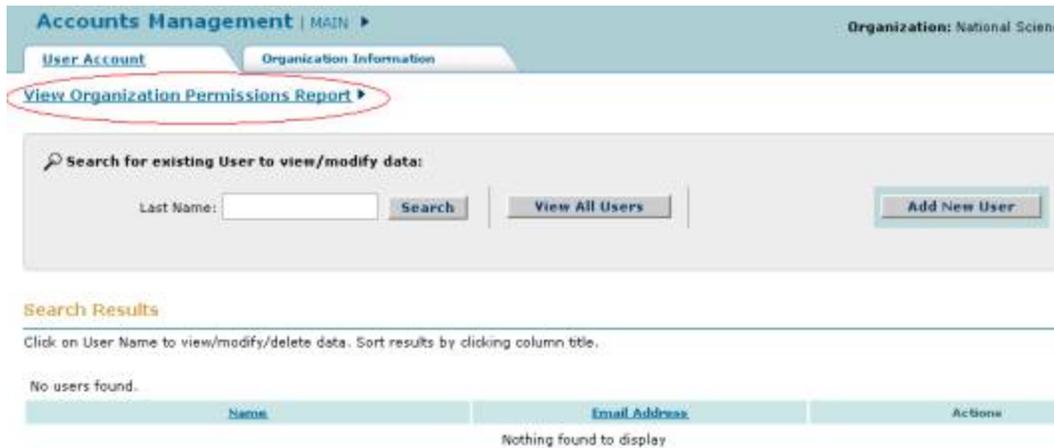


Figure 1 Accounts Management screen on the User Account tab. The View Organization Permissions Report link is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click **View Organization Permissions Request**. The **Organizations Permission Report** screen displays (Figure 2), where you have the following options:
 - [View permissions for selected users](#)
 - [View users for selected permissions](#)
 - [View a full report of all permissions for all users](#)

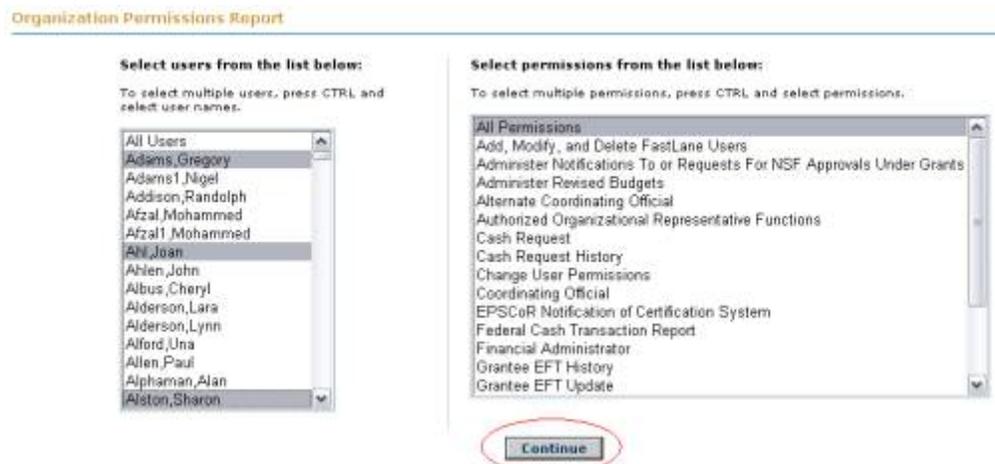


Figure 2 Organization Permissions Report screen. Three user names and All Permissions are highlighted. The Continue button is circled.

View Permissions for Selected Users

1. On the **Organization Permissions Report** screen (Figure 2), from the **Select Users** list (Figure 2), highlight the users whose permissions you want to view or highlight All Users.
2. From the **Select Permissions** list (Figure 2), highlight All Permissions.
3. Click the **Continue** button (Figure 2). The **User Permissions Search Results** screen displays (Figure 3) showing the permissions for each selected user.

User Permissions Search Results

Sort results by clicking column titles.

6 Records found, displaying 1 to 6:

User	Permission	Phone	E-mail
Adams, Gregory	Add, Modify, and Delete FastLane Users	N/A	gadams@nsf.gov
Adams, Gregory	Administer Notifications To or Requests For NSF Approvals Under Grants	N/A	gadams@nsf.gov
Adams, Gregory	Change User Permissions	N/A	gadams@nsf.gov
Adams, Gregory	Initialize/Change User Password	N/A	gadams@nsf.gov
Adams, Gregory	Organizational Reports	N/A	gadams@nsf.gov
Adams, Gregory	Submit Proposals/Supplements/Updates/Withdrawals to NSF	N/A	gadams@nsf.gov

Figure 3 User Permissions Search Results screen with a listing of the permissions for one of the individuals whose names were highlighted. The other individuals whose names were highlighted have no permissions.

View Users for Selected Permissions

1. On the **Organization Permissions Report** screen (Figure 4), from the **Select Permissions** list (Figure 4), highlight the permissions for which you want to see the users.

Organization Permissions Report

Select users from the list below:

To select multiple users, press CTRL and select user names.

- All Users
- Adams, Gregory
- Adams1, Nigel
- Addison, Randolph
- Afzal, Mohammed
- Afzail, Mohammed
- Ahl, Joan
- Ahlen, John
- Albus, Cheryl
- Alderson, Lara
- Alderson, Lynn
- Alford, Una
- Allen, Paul
- Alphaman, Alan
- Alston, Sharon

Select permissions from the list below:

To select multiple permissions, press CTRL and select permissions.

- All Permissions
- Add, Modify, and Delete FastLane Users
- Administer Notifications To or Requests For NSF Approvals Under Grants
- Administer Revised Budgets
- Alternate Coordinating Official
- Authorized Organizational Representative Functions**
- Cash Request
- Cash Request History
- Change User Permissions
- Coordinating Official
- EPSCoR Notification of Certification System
- Federal Cash Transaction Report
- Financial Administrator
- Grantee EFT History
- Grantee EFT Update

Continue

Figure 4 Organization Permissions Report screen. All Users and the Authorized Organizational Representative Functions permission are highlighted. The Continue button is circled.

2. From the **Select Users** list (Figure 4), highlight All Users.
3. Click the **Continue** button (Figure 4). The **User Permissions Search Results** screen displays (Figure 5) showing the users for the highlighted permission.

User Permissions Search Results

Sort results by clicking column titles.

61 Records found, displaying 1 to 10 [[Previous 10](#)] 1, 2, 3, 4, 5, 6, 7 [[Next 10 >](#)]

User	Permission	Phone	E-mail
Albus, Cheryl	Authorized Organizational Representative Functions	703-292-7051	calbus@nsf.gov
Alderson, Lara	Authorized Organizational Representative Functions	703-747-2345	lalderson@bearingpoint.net
Alderson, Lynn	Authorized Organizational Representative Functions	N/A	lynnald@hotmail.com
Allen, Paul	Authorized Organizational Representative Functions	N/A	paul.allen@nsf.gov
Alphaman, Alan	Authorized Organizational Representative Functions	123-456-7890	ref2@test.com
Aortester, Alpha	Authorized Organizational Representative Functions	111-111-1111	kchetla@nsf.gov
B-thomas, Evelyn	Authorized Organizational Representative Functions	703-292-4204	ebthomas@nsf.gov
Bailey, Charlett	Authorized Organizational Representative Functions	N/A	cbailey@nsf.gov
Bailey-thomas, Evelyn	Authorized Organizational Representative Functions	703-306-1145	ebailey@nsf.gov
Basley, Elena	Authorized Organizational Representative Functions	703-306-1152	ebailey@nsf.gov

Figure 5 Organization Permissions Search Results screen listing all users who have the Authorized Organizational Representative Functions permission.

View All Permissions for All Users

1. On the **Organization Permissions Report** screen (Figure 6), from the **Select Permissions** list (Figure 6), highlight All Permissions.



Figure 6 Organization Permissions Report screen. All Users and All Permissions are highlighted. The Continue button is circled.

2. From the **Select Users** list (Figure 6), highlight All Users.
3. Click the **Continue** button (Figure 6). The **User Permissions Search Results** screen displays (Figure 7) showing the permissions for all users, who are listed in alphabetical order.

User Permissions Search Results

Sort results by clicking column titles.

1,159 Records found, displaying 1 to 10 [[Previous 10](#)] [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#), [9](#), [10](#) [[Next 10](#) >]

User	Permission	Phone	Email
Adams,Gregory	Add, Modify, and Delete FastLane Users	N/A	gadams@nsf.gov
Adams,Gregory	Administer Notifications To or Requests For NSF Approvals Under Grants	N/A	gadams@nsf.gov
Adams,Gregory	Change User Permissions	N/A	gadams@nsf.gov
Adams,Gregory	Initialize/Change User Password	N/A	gadams@nsf.gov
Adams,Gregory	Organizational Reports	N/A	gadams@nsf.gov
Adams,Gregory	Submit Proposals/Supplements/Updates/Withdrawals to NSF	N/A	gadams@nsf.gov
Adams1,Nigel	Organizational Reports	N/A	nadams@nsf.gov
Afzal,Mohammed	Add, Modify, and Delete FastLane Users	703-428-3422	mafzal@nsf.gov
Afzal,Mohammed	Administer Notifications To or Requests For NSF Approvals Under Grants	703-428-3422	mafzal@nsf.gov
Afzal,Mohammed	Administer Revised Budgets	703-428-3422	mafzal@nsf.gov

Figure 7 User Permissions Search Results screen with a listing of all users in alphabetical order and with the permissions listed for each user.

Revise Organization Information

Note: If you need to change the name of your organization, see [Change Organization Name](#) for instructions.

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see [Access Accounts Management](#)).

The screenshot shows the 'Accounts Management' interface. At the top, there are two tabs: 'User Account' and 'Organization Information', with the latter circled in red. Below the tabs, there is a search area with a text input for 'Last Name', a 'Search' button, a 'View All Users' button, and an 'Add New User' button. A table below the search area has columns for 'Name', 'Email Address', and 'Actions'.

Figure 1 Accounts Management screen on the User Account tab. The Organization Information tab is circled.

2. On the **Accounts Management** screen (Figure 1), click the **Organization Information** tab. The **Revise Information** screen displays (Figure 2).

The screenshot shows the 'Revise Information' screen for the 'National Science Foundation'. It includes a header with the organization name and ID, and a section for 'Organization Profile' with various input fields for address, contact information, and identifiers. A 'Submit Changes' button is circled in red at the bottom.

Organization Profile

- *Organization Name: NSF
- *Address 1: 4201 Wilson Boulevard
- Address 2:
- *City: Arlington
- *State: Virginia
- *Zip: 222301000
- *Country: United States
- *E-mail: fastlane@nsf.gov
- *Telephone Number: 7032927151
- Fax Number: 7032923465
- *EIN/TIN: 324325436
- *DUNS Number: 112233444
- DUNS Qualifier: int0

Request Change of Organization Name
An Organization Change Request is Pending: NSF

Figure 2 Revise Information screen. The Submit Changes button is circled.

3. In the boxes (Figure 2), revise the information as you require.
4. Click the **Submit Changes** button (Figure 2). The **Revise Information** screen displays (Figure 3) again with the revised organization information.

Revise Information for -- National Science Foundation

Required Fields are preceded by an asterisk (*)

Organization Profile

***Organization Name:** NSF
***Address 1:** 4201 Wilson Boulevard
Address 2:
***City:** Arlington
***State:** VA ***Zip:** 222301000
***Country:** US

***E-mail:** fastlane@nsf.gov
***Telephone Number:** 7032927151
Fax Number: 7032923465

***EIN/TIN:** 324325436
***DUNS Number:** 112233444
DUNS Qualifier: inti

[Confirm Changes](#)

[Cancel](#)

Figure 3 Revise Information screen with the revisions. The Confirm Changes button is circled.

5. Click the **Confirm Changes** button (Figure 3). The **Confirmation** screen displays (Figure 4) with a message that the organization information has been revised.



Figure 4 Confirmation screen. The Account Management Main link is circled.

6. Click **Account Management Main** (Figure 4). The **Accounts Managements** screen displays on the **User Account** tab.

Change the Organization Name

Note: If you need to revise other organization information, see [Revise Organization Information](#) for instructions.

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see [Access Accounts Management](#)).

The screenshot shows the 'Accounts Management' interface. At the top, there are two tabs: 'User Account' and 'Organization Information', with the latter circled in red. Below the tabs, there is a search area with a text input for 'Last Name', a 'Search' button, a 'View All Users' button, and an 'Add New User' button. At the bottom, there is a table header with columns for 'Name', 'Email Address', and 'Actions'.

Figure 1 Accounts Management screen on the User Account tab. The Organization Information tab is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click the **Organization Information** tab. The **Revise Information** screen displays (Figure 2).

The screenshot shows the 'Revise Information' screen for the 'National Science Foundation'. The organization ID is 4102852000. The form contains various fields for organization details, including name, address, city, state, zip, country, email, telephone, fax, EIN/TIN, and DUNS number. A link labeled 'Request Change of Organization Name' is circled in red. At the bottom, there are 'Submit Changes' and 'Cancel' buttons.

Figure 2 Revise Information screen. The Request Change of Organization Name link is circled.

3. Click **Request Change of Organization Name** (Figure 2). The **Request Change of Organization Name** screen displays (Figure 3).

Request Change of Organization Name for -- National Science Foundation Organization ID: 410285200
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:

Figure 3 Request Change of Organization Name screen. The Submit Request button is circled.

4. In the **New Name of Organization** box (Figure 3), type the new name.
5. In the **Short Name** box (Figure 3), type the short name of the organization (optional).
6. In the **Award Letter Email Address** (Figure 3), type the email address of the individual who receives award letters.
7. In the **Recipient Name** box (Figure 3), write the name of the email recipient (optional).
8. In the **Additional Comments** box (Figure 3), type or copy and paste any additional information that you want to convey on the organization's name change.
9. Click the **Submit Request** button (Figure 3). The **Confirmation** screen displays (Figure 4) with the message that your organization name change has been submitted to NSF.

CONFIRMATION

Request for Organization Name Change

Your request for Organization Name Change has been submitted to NSF.

[Account Management Main](#)

Figure 4 Confirmation screen. The Account Management link is circled.

10. Click **Account Management Main** (Figure 4). The **Accounts Management** screen displays on the **User Account** tab.

Check the Status of an Organization Name Change

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see [Access Accounts Management](#)).

The screenshot shows the 'Accounts Management' interface. At the top, there are two tabs: 'User Account' and 'Organization Information'. The 'Organization Information' tab is highlighted with a red circle. Below the tabs, there is a search bar with the text 'Search for existing User to view/modify data:'. To the right of the search bar are buttons for 'Search', 'View All Users', and 'Add New User'. Below the search bar, there is a table with columns for 'Name', 'Email Address', and 'Actions'. The table is currently empty.

Figure 1 Accounts Management screen on the User Account tab. The Organization Information tab is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click the **Organization Information** tab. If NSF has not yet approved a name change request, the **Revise Information** screen displays as in Figure 2 with a message that the name change is pending. If a name change request has been approved, the screen displays without the message. You can still submit a new name request if a previous request is still pending (see [Change the Organization Name](#) for instructions).

The screenshot shows the 'Revise Information for -- NSF' screen. The organization ID is 4102852000. The screen displays various fields for organization information, including address, city, state, zip, country, e-mail, telephone number, fax number, EIN/TIN, DUNS number, and DUNS qualifier. A red box highlights a message that says 'An Organization Change Request is Pending: New National Science Foundation'. The message is circled in red.

Figure 2 Revise Information screen. Circled is the message that an organization change request is pending, along with the new name.

Organizational Reports

Organizational Reports Introduction

In Organizational Reports, you can view basic information about the activity of your organization with NSF.

In Organizational Reports, you can view the following:

- [Recent proposals](#)
Search for proposals and check their status
- [Documents not electronically signed](#)
View a listing of all documents awaiting electronic signature with the option of viewing a list of your organization's users with the AOR permission
- [Active awards](#)
Search for awards with the option to view the abstract for an award
- [Final Project Reports](#)
Check the status of Final Project Reports for expired awards
- [Continuing Grant Increments](#)
Check continuation funding status
- [Organizational Permissions Report](#)
View the permissions for your organization's users
(Click on a link above for the instructions for that option.)

See [Access Organizational Reports](#) for instructions to begin working on Organizational Reports.

Access Organizational Reports

1. Access the **Research Administration** screen (Figure 1) (see [Log In to SPO Functions](#)).



Figure 1 Research Administration screen. The Organizational Reports link is circled.

2. On the **Research Administration** screen (Figure 1), click **Organizational Reports**. The **Organizational Reports** screen displays (Figure 2).

 The image shows the "Organizational Reports" screen. At the top, there is a breadcrumb "Organizational Reports | MAIN". Below this is a "Select Organization Name:" label followed by a dropdown menu currently showing "National Science Foundation". Underneath is the "Indicate Report Type:" section with six radio button options: "Recent Proposals" (which is selected), "Documents Not Electronically Signed", "Active Awards", "Final Project Reports", "Continuing Grant Increments", and "Organization Permissions Report". At the bottom center, there is a "Continue" button.

Figure 2 Organizational Reports screen.

3. In the **Select Organization Name** drop-down list (Figure 2), select the organization whose reports you want to view.
4. In the **Indicate Report Type** section (Figure 2), you have options to view the following:
 - [Recent proposals](#)
 - [Documents not electronically signed](#) listing
 - [Active awards](#) listing

pd_spo_functions

- [Final Project Reports](#)
- [Continuing Grant Increments](#)
- [Organizational Permissions Report](#)
(Click on a link above for instructions for that option.)

View Recent Proposals Reports

1. Access the **Organizational Reports** screen (Figure 1) (see [Access Organizational Reports](#)).

Organizational Reports | MAIN ▶ Organization: Carnegie-Mellon University

Select Organization Name:

Indicate Report Type:

- Recent Proposals**
- Documents Not Electronically Signed
- Active Awards
- Final Project Reports
- Continuing Grant Increments
- Organization Permissions Report

Figure 1 Organizational Reports screen. The radio button for Recent Proposals and the Continue button are circled.

2. On the **Organizational Reports** screen (Figure 1), click the radio button for Recent Proposals.
3. Click the **Continue** button (Figure 1). The **Recent Proposals** screen displays (Figure 2).

Recent Proposals

Search for Recent Proposals by any of the following:

Status:

Pending

Recommended for funding

Declined

All

Date of most recent status change:

Proposal Number:

PI's Last Name:

Sort results by:

Status

Proposal Number

PI's Last Name

Performing Organization

Figure 2 Recent Proposals screen. The Continue button is circled.

4. In the **Search for Recent Proposals** section (Figure 2), search for proposals by any of these criteria:
 - **Status**
Click a radio button for a status criterion.
 - **Date of most recent status change**
Type the date of the latest status change (in mm/dd/yyyy format).
 - **Proposal number**
Type the proposal number.
 - **PI's last name**
Type the last name of a PI.
5. In the **Sort Results By** section (Figure 2), click a radio button for one of the sort criteria.
6. Click the **Continue** button (Figure 2). The **Recent Proposals Search Results** screen displays (Figure 3) with a listing of recent proposals.

Recent Proposals Search Results

Click on "Proposal Number" to view detailed Proposal information. Sort results by clicking column titles.

2 Proposals found, displaying 1 to 2

1

Division	Proposal Number	Proposal Title	PI Name	Performing Organization	Status	Status Date	Requested Amount	Program Officer
CNS	0546515	eGovernment Technical Challenges	Demo, Terri	Carnegie Mellon University	Awarded	01/12/2006	\$697,966.00	Mary A. Smith
CNS	0551692	eGovernment Technical Challenges	Demo, Terri	Carnegie Mellon University	Withdrawn	01/27/2006	\$739,361.00	Mary A. Smith

Transfer Data to: [Excel](#)

Figure 3 Recent Proposals Search Results screen. The proposal number is circled for a proposal.

- To see detailed information on a proposal, select the proposal number (Figure 3) on the row for the proposal whose information you want to see. The **Proposal Information** screen displays (Figure 4) with the information.

Proposal Information

PROPOSAL

Proposal Number: **0546515**
 Proposal Title: **eGovernment Technical Challenges**
 Received on: **07/19/05**
 Principal Investigator: **Terri Demo**
 Organization: **Carnegie Mellon University**
This Proposal has been Electronically Signed by the Authorized Organizational Representative (AOR).

PROGRAM

NSF Division: **DIVISION OF COMPUTER AND NETWORK SYSTEMS**
 Program Name: **NETWORK SYSTEMS**
 Program Officer: **Mary A. Smith**
 Telephone: **(703) 555-1212**
 Email: **msmith@nsf.gov**

PROPOSAL STATUS

Status As of Today Dated: **09/20/06**
 Award **0546551** was made on **01/12/06** for \$ **90,804.00** with an effective date of **03/01/06**.

Award Duration: **12** (months)

Figure 4 Proposal Information screen.

View Documents Not Electronically Signed

1. Access the **Organizational Reports** screen (Figure 1) (see [Access Organizational Reports](#)).

Organizational Reports | MAIN >

Select Organization Name: National Science Foundation ▼

Indicate Report Type:

Recent Proposals

Documents Not Electronically Signed

Active Awards

Final Project Reports

Continuing Grant Increments

Organization Permissions Report

Continue

Figure 1 Organizational Reports screen. The radio button for Documents Not Electronically Signed and the Continue button are signed.

2. On the **Organizational Reports** screen (Figure 1), click the radio button for Documents Not Electronically Signed.
3. Click the **Continue** button (Figure 1). The **Documents That Are Not Electronically Signed** screen displays (Figure 2) with an explanation of NSF use of electronic signatures.

Documents that are Not Electronically Signed

Effective June 1, 2001, all proposals to NSF are required to be electronically signed by an Authorized Organizational Representative (AOR) of the submitting organization. This process can concurrently occur with submission of the proposal for those organizations where the individual authorized to submit proposals to NSF also is a designated AOR, or as a separate function for those organizations that choose to keep the certification process separate from the submission function. For those using the separate function, AORs with the Authorized Organizational Representative Functions permission will use the "Authorized Organizational Representative Functions" application within Organizational Management to electronically sign proposals. For those organizations where the submission and certification processes are separate, the AOR has five business days from the date of electronic submission to electronically sign the proposal.

Effective November 28, 2001, all Revised Proposal Budgets, PI Transfer Requests, Change of PI Requests, and Addition of Subaward Requests submitted via FastLane to NSF are required to be electronically signed by an Authorized Organizational Representative (AOR) of the submitting organization. This process can concurrently occur with submission for those organizations where the individual authorized to submit is a designated AOR, or as a separate function for those organizations that choose to keep the certification process separate from the submission function. For those using the separate function, AORs with the Authorized Organizational Representative Functions permission will use the "Authorized Organizational Representative Functions" application within Organizational Management to electronically sign these documents. For those organizations where the submission and certification processes are separate, the AOR has five business days from the date of electronic submission to electronically sign the document.

Click on "Continue" button to see the documents, if any, that have not yet been electronically signed by an AOR at your organization. Only unsigned proposals submitted since June 1, 2001 and unsigned Revised Proposal Budgets, PI Transfer Requests, Change of PI Requests, and Addition of Subaward Requests submitted since November 28, 2001 will appear on this report.

Continue

Figure 2 Documents That Are Not Electronically Signed screen. The Continue button is circled.

- Click the **Continue** button (Figure 2). The **Documents Not Electronically Signed** screen displays (Figure 3) with any documents that are awaiting electronic signature.

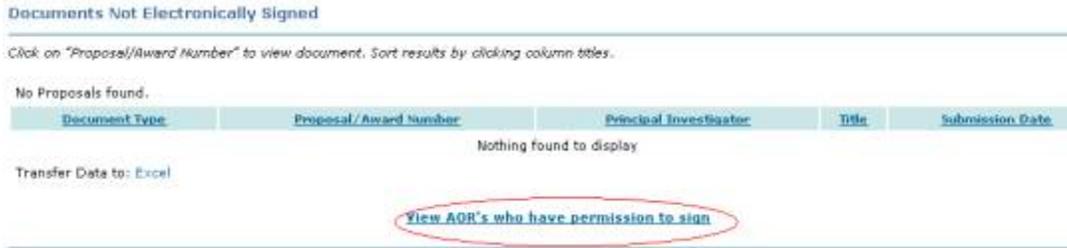


Figure 3 Documents Not Electronically Signed screen. The View AORs Who Have Permission to Sign link is circled.

- To see the list of individuals with permissions to sign, click **View AORs Who Have Permission to Sign** (Figure 3). The **Following AORs Have Permission to Sign** screen displays with a listing of individuals with the permission for electronic signature.

The following AOR's have permission to sign:

19 AORs found, displaying 1 to 10 [< Previous 10] 1, 2 [Next 10 >]

AOR	Phone	E-mail
Aragon,Laurie	800-772-6627	l.aragon@comap.com
Demo,Terry	703-292-1000	tdemo@nsf.gov
Demo,Terry	703-292-1000	tdemo@nsf.gov
Demo,David	703-292-8026	dlotts@nsf.gov
Demo,David	703-292-8026	dlotts@nsf.gov
Dent,Arthur	703-555-1212	dlotts@nsf.gov
Goodrich,Pat	540-231-4558	goodm@vt.edu
Kctester1,John	111-111-1111	abc@xyz.com
M,M	N/A	m,m@bp.com
Mccullough,Vincent	N/A	vincent.mccullough@ngc.com

Figure 4 The Following AORs Have Permission to Sign screen.

View Active Awards

1. Access the **Organizational Reports** screen (Figure 1) (see [Access Organizational Reports](#)).

Organizational Reports | MAIN ▶

Select Organization Name: University of California University Wide Extension Serv ▼

Indicate Report Type:

- Recent Proposals
- Documents Not Electronically Signed
- Active Awards
- Final Project Reports
- Continuing Grant Increments
- Organization Permissions Report

Continue

Figure 1 Organizational Reports screen. The radio button for Active Awards and the Continue button are circled.

2. On the **Organizational Reports** screen (Figure 1), select the radio button for Active Awards.
3. Select the **Continue** button (Figure 1). The **Active Awards** screen displays (Figure 2).

Active Awards

Search for Awards by any of the following:

Award Date occurring on or between the following date(s):
 (If searching for a particular date, enter same date for both "To" and "From" dates.)

From : To :

Award Number:
 (Enter 7 digits)

Status Change occurring anytime after the following date:

Sort results by:

Performing Organization
 Award Expiration Date
 Award Number

Figure 2 Active Awards screen. The Continue button is circled.

4. In the **Search for Awards** section (Figure 2), search for active awards by any of the following criteria:
 - **Date range**
 - In the **From** box, enter the beginning date for the range (in mm/dd/yyyy format).
 - In the **To** box, enter the ending date for the range (in mm/dd/yyyy format).
 - **Award number**
 - In the **Award** number box, type the award number.
 - **Status change**
 - In the **Status Change Occurring Anytime After this Date** box, type the date after which the status change occurred (in mm/dd/yyyy format).
5. In the **Sort Results By** section (Figure 2), click the radio button for one of the sorting criteria:
 - **Performing Organization**
 - **Award Expiration Date**
 - **Award Number**
6. Select the **Continue** button (Figure 2). The **Active Awards Search Results** screen displays (Figure 3) with a listing of the active awards that match your search criteria.

Active Awards Search Results

Click on "Award Number" to view Award Abstract. Sort results by clicking column title.

239 Awards found, displaying 1 to 10 [[< Previous 10](#)] [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#), [9](#), [10](#) [[Next 10 >](#)]

Award Number	PI Name	Performing Organization	Total Award Amount	Award Title	Expiration Date	FPR Due Date	FPR Overdue Date
0329442	Demo, Terri	Carnegie Mellon University	\$100,000.00	eGovernment Technical Challenges	10/31/2006	11/01/2006	01/30/2007

Figure 3 Active Awards Search Results screen. An award number is circled for an active award.

7. Select a column heading (Figure 3) to view the active awards ordered by that category.
8. To view the abstract for an active award, select the award number (Figure 3) on the row for the active award whose abstract you want to view. The **NSF Award Abstract** screen displays (Figure 4) with the award abstract.



NSF Award Abstract - #0329442

eGovernment Technical Challenges

NSF Org BES

Latest Amendment Date October 30, 2006

Award Number 0329442

Award Instrument Standard Grant

Figure 4 NSF Award Abstract screen.

View Final Project Reports Status

1. Access the **Organizational Reports** screen (Figure 1) (see [Access Organizational Reports](#)).

Figure 1 Organizational Reports screen. The radio button for Final Project Reports and the Continue button are circled.

2. On the **Organizational Reports** screen (Figure 1), select the radio button for Final Project Reports.
3. Select the **Continue** button (Figure 1). The **Final Project Reports** screen displays (Figure 2).

Figure 2 Final Project Reports screen. The Continue button is circled.

4. In the **Search to View Project Reports** section (Figure 2), select a radio button for one search criterion.

- In the **Sort Results By** section (Figure 2), select a radio button for one sort criterion.
- Select the **Continue** button (Figure 2). The **Search Results for all Awards by Final Project Report(s)** screen displays (Figure 3) with a listing of awards matching the search criteria entered.

Search Results for All Awards by Final Project Report(s):

Click on "Award Number" link to view details for the Awards' Final Project Report(s). Sort results by clicking column titles.

344 Awards found, displaying 1 to 10 [[< Previous 10](#)] [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#), [9](#), [10](#) [[Next 10 >](#)]

Award Number	Award Type	PI Name	Award Title	Award Expiration Date
0085902	Continuing Grant	Demo, Terri	eGovernment Technical Challenges	08/31/2006
0092436	Continuing Grant	Demo, Terri	eGovernment Technical Challenges	01/31/2007
0092687	Standard Grant	Demo, Terri	eGovernment Technical Challenges	05/31/2007
0093140	Continuing Grant	Demo, Terri	eGovernment Technical Challenges	12/31/2006

Figure 3 Search Results for all Awards by Final Project Report(s). An award number is circled.

- Select the link for the award that you want to view a report for (Figure 3). The **Final Project Report** screen displays (Figure 4).

Final Project Report: Award #0085902

Click on "Report Number" link to view the Final Project Report in PDF format(opens in same window). Report Numbers without links denote reports that has not yet been submitted. Sort results by clicking column titles.

1 Report found. 1

Report Number	NSF Report Status	PI Submission Status	Report Period Start Date	Report Period End Date	Report Due Date	Report Overdue Date	Submission Date
3298222	Action Pending	Submitted	08/02/2005	09/30/2005	10/01/2005	12/30/2005	08/22/2006

Transfer Data to: [Excel](#)

Figure 4 Final Project Report screen. A report number is circled.

- Select the link (Figure 4) for the report number you want to view. A screen displays (Figure 5) with the report contents in PDF format. If you need to download Adobe Reader, see [Adobe Reader for FastLane](#).

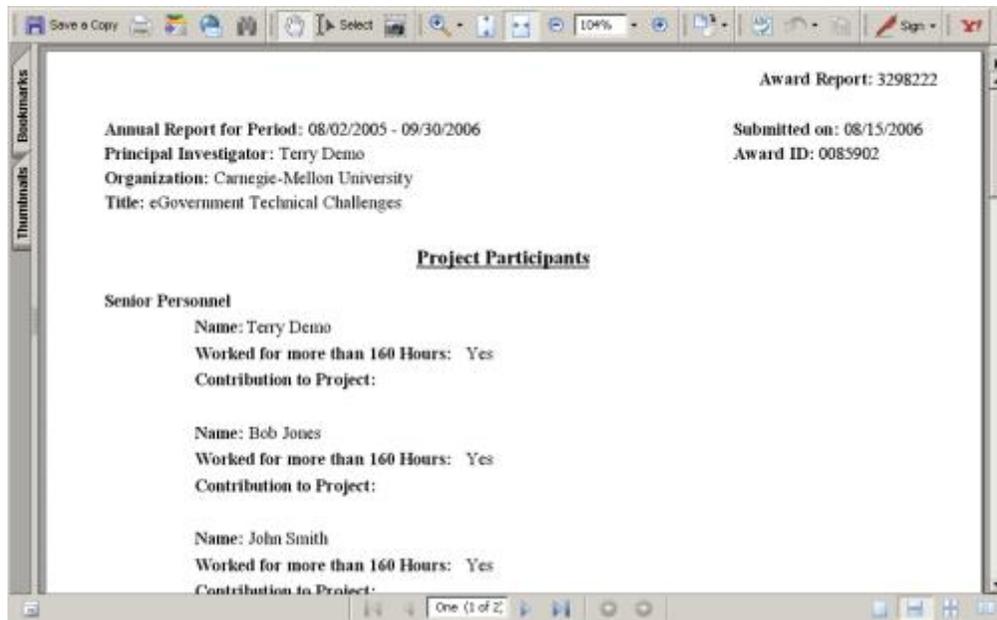


Figure 5 Screen with the selected report in PDF format.

View Continuing Grant Increments

1. Access the **Organizational Reports** screen (Figure 1) (see [Access Organizational Reports](#)).

Organizational Reports | MAIN ▶ Organization: Carnegie-Mellon University

Select Organization Name:

Indicate Report Type:

- Recent Proposals
- Documents Not Electronically Signed
- Active Awards
- Final Project Reports
- Continuing Grant Increments
- Organization Permissions Report

Figure 1 Organizational Reports screen. The radio button for Continuing Grant Increments and the Continue button are circled.

2. On the **Organizational Reports** screen (Figure 1), select the radio button for Continuing Grant Increments.
3. Select the **Continue** button (Figure 1). The **Continuing Grant Increments** screen displays (Figure 2).

Continuing Grant Increments

Select Key Fiscal Year in which increment is due:

Sort results by:

- Final Project Due Date
- PI's Last Name
- Award Number

Figure 2 Continuing Grant Increments screen. The Continue button is circled.

4. In the **Select Key Fiscal Year in which Increment Is Due** drop-down box (Figure 2), select the fiscal year for the award you want to check.
5. In the **Sort Results By** list (Figure 2), select a radio button (Figure 2) for a criterion to sort the awards by:
 - **Final Project Due Date**
 - **PI's Last Name**
 - **Award Number**
6. Select the **Continue** button (Figure 2). The **Search Results for Awards by Continuing Grant Increments** screen displays (Figure 3) with a listing of the awards that meet your search criteria.

Search Results for Awards by Continuing Grant Increments FY07:

Click on "Award Number" link to view details for the Awards' Project Report(s). Sort results by clicking column titles.

124 Awards found, displaying 1 to 10 [[Previous 10](#)] [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#), [9](#), [10](#) [[Next 10](#) >]

Award Number	PI Name	Award Title	Date of Next Increment Expected	Increment Amount
0002930	Demo, Terry	BIO Research Training Group Program: Biology in Small Populations	12/31/2007	\$80,000.00
0002931	Demo, Terry	Experimental and Theoretical Studies on the Structure of Highly Preheated Air Flames	12/31/2007	\$60,000.00
0002932	Demo, Terry	BIO Research Training Group Program: Biology in Small Populations	12/31/2007	\$80,000.00
0002933	Demo, Terry	Experimental and Theoretical Studies on the Structure of Highly Preheated Air Flames	12/31/2007	\$60,000.00
0002934	Demo, Terry	BIO Research Training Group Program: Biology in Small Populations	12/31/2007	\$80,000.00
0002935	Demo, Terry	Experimental and Theoretical Studies on the Structure of Highly Preheated Air Flames	12/31/2007	\$60,000.00

Figure 3 Search Results for Awards by Continuing Grant Increments screen. An award number is circled.

7. Select the link for the award number (Figure 3) that you want to view a report for. The **Continuing Grant Increments** screen displays (Figure 4).

Continuing Grants Increments FY07 Project Report: Award #0002930

Click on "Report Number" link to view the Project Report in PDF format (opens in same window). Report Numbers without links denote reports that has not yet been submitted. Sort results by clicking column titles.

1 Report found. 1

Report Number	NSF Report Status	PI Submission Status	Report Period Start Date	Report Period End Date	Report Due Date	Report Overdue Date	Submission Date
8910111	Due	Not Submitted	05/02/2006	04/30/2007	01/30/2007	05/01/2007	--

Transfer Data to: [Excel](#)

Figure 4 Continuing Grant Increments screen. A report number is circled.

8. Select the report number link for the report you want to view (Figure 4). A screen displays (Figure 5) with the report contents in PDF format. If you need to download Adobe Reader, see [Adobe Reader for FastLane](#).

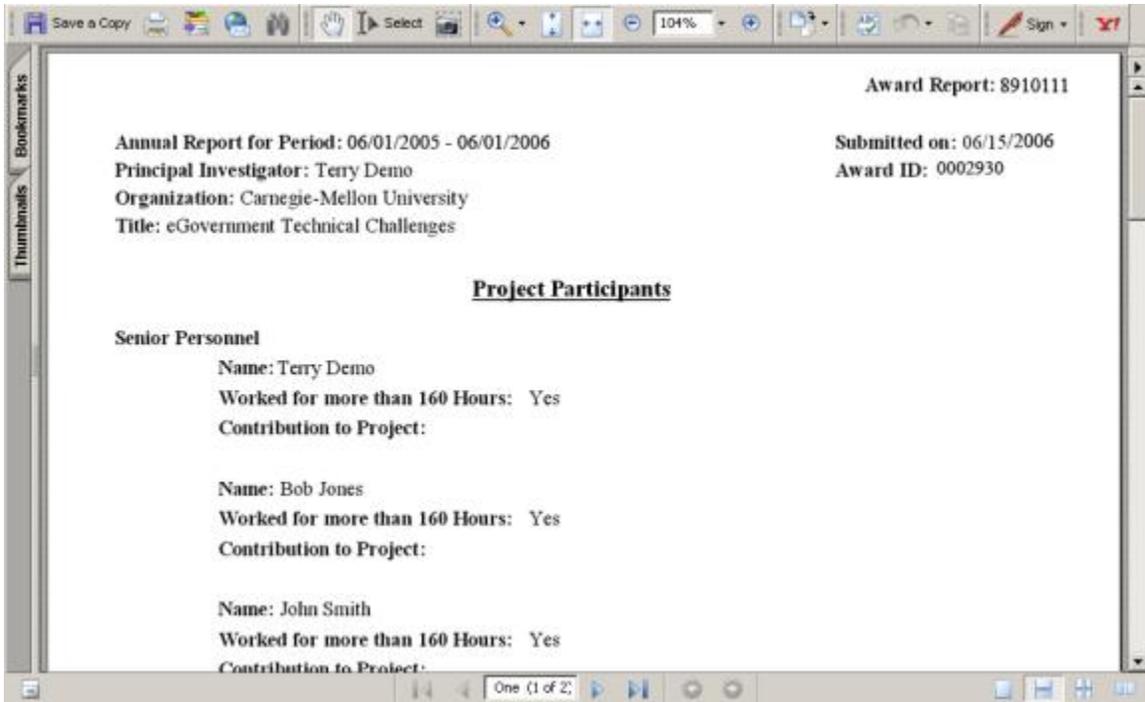


Figure 5 Screen with the selected report in PDF format.

View User Permissions Report

1. Access the **Organizational Reports** screen (Figure 1) (see [Access Organizational Reports](#)).

Figure 1 Organizational Reports screen. The radio button for Organization Permissions Report and the Continue button are circled.

2. On the **Organizational Reports** screen (Figure 1), click the radio button for Organization Permissions Report.
3. Click the **Continue** button (Figure 1). The **Organizations Permission Report** screen displays (Figure 2), where you have the following options:
 - [View permissions for selected users](#)
 - [View users for selected permissions](#)
 - [View a full report of all permissions for all users](#)

Figure 2 Organization Permissions Report screen. Three user names and All Permissions are highlighted. The Continue button is circled.

View Permissions for Selected Users

1. On the **Organization Permissions Report** screen (Figure 2), from the **Select Users** list (Figure 2), highlight the users whose permissions you want to view or highlight All Users.
2. From the **Select Permissions** list (Figure 2), highlight All Permissions.
3. Click the **Continue** button (Figure 2). The **User Permissions Search Results** screen displays (Figure 3) showing the permissions for each selected user.

User Permissions Search Results

Sort results by clicking column titles.

6 Records found, displaying 1 to 6:

User	Permission	Phone	E-mail
Adams, Gregory	Add, Modify, and Delete FastLane Users	N/A	gadams@nsf.gov
Adams, Gregory	Administer Notifications To or Requests For NSF Approvals Under Grants	N/A	gadams@nsf.gov
Adams, Gregory	Change User Permissions	N/A	gadams@nsf.gov
Adams, Gregory	Initialize/Change User Password	N/A	gadams@nsf.gov
Adams, Gregory	Organizational Reports	N/A	gadams@nsf.gov
Adams, Gregory	Submit Proposals/Supplements/Updates/Withdrawals to NSF	N/A	gadams@nsf.gov

Figure 3 User Permissions Search Results screen with a listing of the permissions for one of the individuals whose names were highlighted. The other individuals whose names were highlighted have no permissions.

View Users for Selected Permissions

1. On the **Organization Permissions Report** screen (Figure 4), from the **Select Permissions** list (Figure 4), highlight the permissions for which you want to see the users.

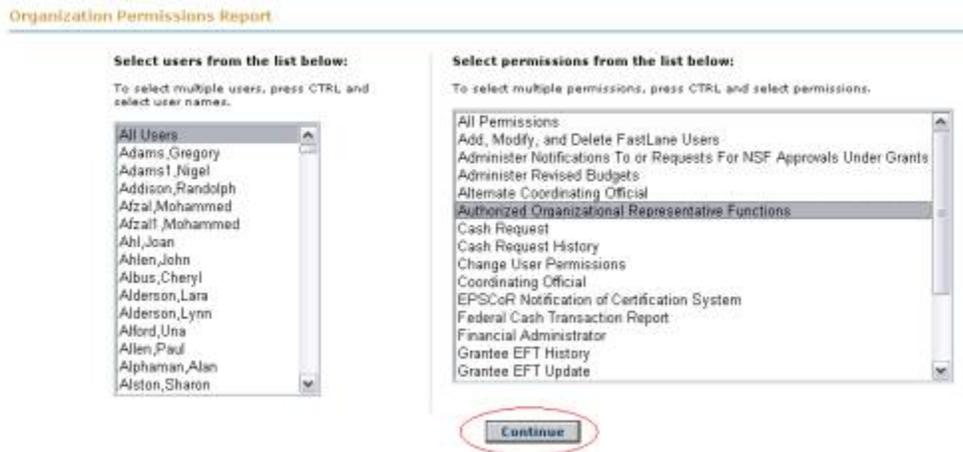


Figure 4 Organization Permissions Report screen. All Users and the Authorized Organizational Representative Functions permission are highlighted. The Continue button is circled.

2. From the **Select Users** list (Figure 4), highlight All Users.

- Click the **Continue** button (Figure 4). The **User Permissions Search Results** screen displays (Figure 5) showing the users for the highlighted permission.

User Permissions Search Results

Sort results by clicking column titles.

61 Records found, displaying 1 to 10 [[Previous 10](#)] 1, 2, 3, 4, 5, 6, 7 [[Next 10 >](#)]

User	Permission	Phone	Email
Albus, Cheryl	Authorized Organizational Representative Functions	703-292-7051	calbus@nsf.gov
Alderson, Lara	Authorized Organizational Representative Functions	703-747-2345	lalderson@bearingpoint.net
Alderson, Lynn	Authorized Organizational Representative Functions	N/A	lynnald@hotmail.com
Allen, Paul	Authorized Organizational Representative Functions	N/A	paul.allen@nsf.gov
Alphaman, Alan	Authorized Organizational Representative Functions	123-456-7890	ref2@test.com
Aortester, Alpha	Authorized Organizational Representative Functions	111-111-1111	kchetla@nsf.gov
B-thomas, Evelyn	Authorized Organizational Representative Functions	703-292-4204	ebthomas@nsf.gov
Bailey, Charlett	Authorized Organizational Representative Functions	N/A	cbailey@nsf.gov
Bassey-thomas, Evelyn	Authorized Organizational Representative Functions	703-306-1145	ebassey@nsf.gov
Basley, Elena	Authorized Organizational Representative Functions	703-306-1152	ebasley@nsf.gov

Figure 5 Organization Permissions Search Results screen listing all users who have the Authorized Organizational Representative Functions permission.

View All Permissions for All Users

- On the **Organization Permissions Report** screen (Figure 6), from the **Select Permissions** list (Figure 6), highlight All Permissions.



Figure 6 Organization Permissions Report screen. All Users and All Permissions are highlighted. The Continue button is circled.

- From the **Select Users** list (Figure 6), highlight All Users.
- Click the **Continue** button (Figure 6). The **User Permissions Search Results** screen displays (Figure 7) showing the permissions for all users, who are listed in alphabetical order.

User Permissions Search Results

Sort results by clicking column titles.

1,159 Records found, displaying 1 to 10 [[Previous 10](#)] [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#), [9](#), [10](#) [[Next 10](#) >]

User	Permission	Phone	Email
Adams,Gregory	Add, Modify, and Delete FastLane Users	N/A	gadams@nsf.gov
Adams,Gregory	Administer Notifications To or Requests For NSF Approvals Under Grants	N/A	gadams@nsf.gov
Adams,Gregory	Change User Permissions	N/A	gadams@nsf.gov
Adams,Gregory	Initialize/Change User Password	N/A	gadams@nsf.gov
Adams,Gregory	Organizational Reports	N/A	gadams@nsf.gov
Adams,Gregory	Submit Proposals/Supplements/Updates/Withdrawals to NSF	N/A	gadams@nsf.gov
Adams1,Nigel	Organizational Reports	N/A	nadams@nsf.gov
Afzal,Mohammed	Add, Modify, and Delete FastLane Users	703-428-3422	mafzal@nsf.gov
Afzal,Mohammed	Administer Notifications To or Requests For NSF Approvals Under Grants	703-428-3422	mafzal@nsf.gov
Afzal,Mohammed	Administer Revised Budgets	703-428-3422	mafzal@nsf.gov

Figure 7 User Permissions Search Results screen with a listing of all users in alphabetical order and with the permissions listed for each user.

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