



State of Indiana eCivis Grants Network Policy

User Management

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Definitions

Account Setup – The process of creating an Agency eCivis user account in eCivis Grants Network. External Applicants and Subrecipients do not need an eCivis Grants Network license but will need to have an account set up in the Portal to use the system. Also, see Portal (eCivis Portal).

Agency eCivis User – A user of eCivis Grants Network. This is a State of Indiana staff person using the system as a Grantee or Grantor. See Grantee and Grantor.

Applicant – An individual or entity applying to a grant program.

Department – Departments built within eCivis Grants Network. A single Indiana State Agency may have one or more departments within eCivis Grants Network representing their divisions, offices, agencies, etc.

Department Master Account Holder (DMAH) – An Agency eCivis user that can see across their entire eCivis Grants Network listing or department, typically an Indiana State Agency Lead.

eCivis – The software vendor that created eCivis Grants Network (Indiana State Agencies as Grantees/Grantors) and eCivis Portal (Applicants/Subrecipients to Indiana State Agencies' grant programs).

eCivis Grants Network – The grant management system created by eCivis for state Grantees/Grantors.

Grantee – Persons or organizations who receive funding from another party. Indiana State Agencies operate in the role of a Grantee when they receive funding from external parties like the Federal government. A Grantee is also referred to as a Subrecipient.

Grantor – Persons or organizations that provide grant funding to another party. Indiana State Agencies operate as Grantors when they distribute grant funds to Subrecipients (Grantees). Also, referred to as a Funder.

Indiana State Agency Lead – A State of Indiana employee in a leadership role within eCivis Grants Network. See Department Master Account Holder (DMAH).

Organization Master Account Holder (OMAH) – An Agency eCivis user that can access all grant activity across the eCivis Grants Network platform.

Project Lead – The State Agency grant program manager or grant coordinator for a specific Grantee project in eCivis Grants Network. Also, Project Lead is referred to sometimes as simply the Lead.

Subrecipient – An entity that receives a grant from an Indiana State Agency utilizing eCivis Grants Network. Referred to also as a Grantee of the Indiana State Agency.

Section 1 – Purpose

The purpose of this policy and procedures user guide is to provide definitions and mechanisms to manage accounts for Agency eCivis users accessing the eCivis Grants Network resource. All Agency eCivis users must abide by the [Information Resources Use Agreement \(IRUA\)](#).

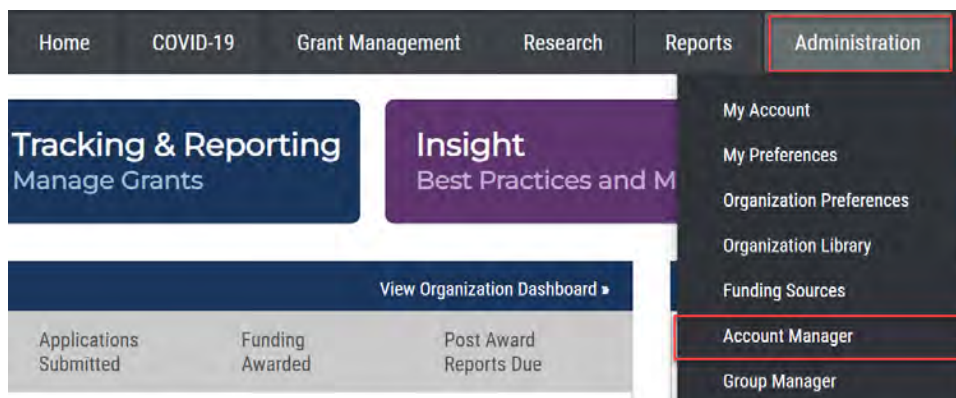
Section 2 – Responsibility

Each department is responsible for the proper management of their users by following the procedures outlined in this document.

User management of eCivis Grants Network accounts involves providing system access, appropriate security, and required accountability across the platform for assigned organizational roles. Creating, controlling, and monitoring user accounts are critical to overall system security.

Section 3 – eCivis License Issuance

The State of Indiana allows only licensed Agency eCivis users to access the eCivis Grants Network. When an agency participates in the enterprise system, a predetermined number of licenses are purchased and renewed annually. A list of licensed Agency eCivis users for the enterprise system, by agency, can be generated in eCivis Grants Network under **Administration -> Account Manager -> Manage user accounts**.



Account Manager

1. Select Action to Perform

- Manage user accounts
- Reset the password of an existing user account
- Add a new user account
- Delete an existing user account
- Generate an email to your organization's GN Users

The State Budget Agency (SBA) is responsible for adding new accounts, deleting old accounts, and managing existing Agency eCivis user accounts. The Indiana Office of Technology (IOT) is responsible for resetting the password of an existing Agency eCivis user's account as the State of Indiana is using IOT's single sign-on authentication method.

Section 4 – Adding a New Agency eCivis User

To add a new Agency eCivis user in eCivis Grants Network, a request must be submitted to SBA by the Agency eCivis user or the agency point of contact (POC) via the ASM eCivis Request Form on the [Contact Grants Management Team](#) page. This is a two-step process. The first step is entering the Agency eCivis user's information utilizing the ASM eCivis Request Form. The second step is SBA Management Information System (MIS or "IT") adding that Agency eCivis user to the State's Azure Active Directory (AAD) eCivis group. Each Agency will have a primary and a secondary authorized user for agency submission approval. All new user requests for all user types must be submitted to the SBA. Agencies are responsible for keeping the list of users update to date and will promptly notify SBA of changes in personnel.

A new Agency eCivis user's Status will be *New* until that user signs in for the first time to the eCivis Grants Network system and completes the account setup. After that, the Agency eCivis user's Status will be *Active*. An Agency eCivis user's Status will change to *Inactive* if they do not access the eCivis system for 180 days.

Section 5 – Existing User Management

The State of Indiana Agency resources with an access level of Department Master Account Holder (DMAH) can update user information for Department level users, Community Based Organizations (CBO) or Auditor access levels within the Departments they have access to. It is best practice for either your agency POC or your Department's Director to make changes to roles within your agency. The State of Indiana is using IOT's single sign-on methodology for usernames and passwords, so it is important that you do not use the Rest Passwords feature of eCivis. Managing accounts are found under **Administration -> Account Manager -> Manage User Accounts**.

Section 6 – Removing Users Best Practices

Agency eCivis users who leave State employment or move to another agency will be removed from the State's AAD through the IOT user offboarding process. This will remove their ability to sign in to eCivis using that account. This will ensure that only appropriate staff retain access to critical system data. The account in eCivis Grants Network must be manually removed. An Agency eCivis user, or the agency POC, must submit the eCivis ASM Request form to the SBA to request deletion of the Agency eCivis user's account.

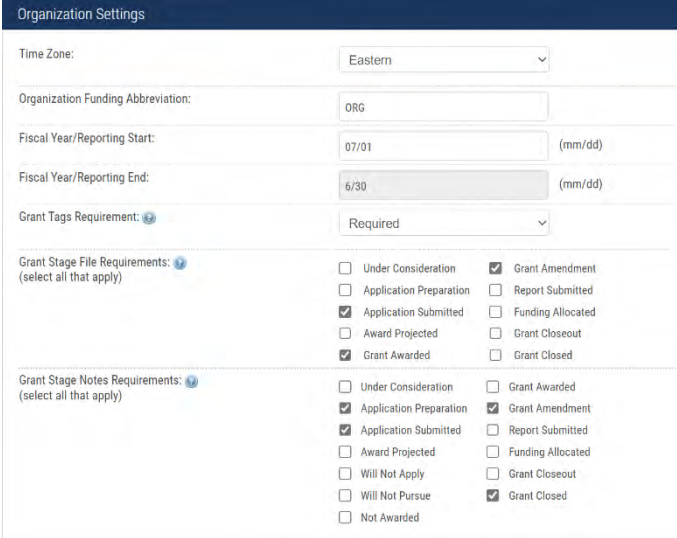
NOTE: Prior to deleting an Agency eCivis user in eCivis Grants Network, all Projects assigned to the Agency eCivis user must be moved to another Project Lead.

Section 7 – Inactive User Status

Agency eCivis users who have not accessed the eCivis system for 180 days will automatically become inactive. If the Agency eCivis user remains inactive, the Agency eCivis user's account should be reviewed and potentially removed from the system.

NOTE: Prior to deleting an Agency eCivis user in eCivis, all projects and tasks assigned to them must be reassigned to another Project Lead.

Section 8 – User Access Levels and Definitions

<p>OMAH</p> <p>(Organization Master Account Holder)</p>	<p>State Budget Agency (SBA) eCivis Users</p> <ul style="list-style-type: none"> • Can access all grant activity across the entire eCivis platform • Have reporting ability across the entire platform • Can manage and add new users to any department • Can create all roles • Can regenerate system invites • Can run User Activity reports at all levels • Can manage the eCivis Organization Library and Preferences including the following:  <p>The screenshot shows the 'Organization Settings' form with the following visible options:</p> <ul style="list-style-type: none"> Time Zone: Eastern Organization Funding Abbreviation: ORG Fiscal Year/Reporting Start: 07/01 (mm/dd) Fiscal Year/Reporting End: 6/30 (mm/dd) Grant Tags Requirement: Required Grant Stage File Requirements (select all that apply): <ul style="list-style-type: none"> <input type="checkbox"/> Under Consideration <input type="checkbox"/> Application Preparation <input checked="" type="checkbox"/> Application Submitted <input type="checkbox"/> Award Projected <input checked="" type="checkbox"/> Grant Awarded <input checked="" type="checkbox"/> Grant Amendment <input type="checkbox"/> Report Submitted <input type="checkbox"/> Funding Allocated <input type="checkbox"/> Grant Closeout <input type="checkbox"/> Grant Closed Grant Stage Notes Requirements (select all that apply): <ul style="list-style-type: none"> <input type="checkbox"/> Under Consideration <input checked="" type="checkbox"/> Application Preparation <input checked="" type="checkbox"/> Application Submitted <input type="checkbox"/> Award Projected <input type="checkbox"/> Will Not Apply <input type="checkbox"/> Will Not Pursue <input type="checkbox"/> Not Awarded <input type="checkbox"/> Grant Awarded <input checked="" type="checkbox"/> Grant Amendment <input type="checkbox"/> Report Submitted <input type="checkbox"/> Funding Allocated <input type="checkbox"/> Grant Closeout <input checked="" type="checkbox"/> Grant Closed <ul style="list-style-type: none"> - Define Fiscal Year start and end dates - Set system-wide email preferences and alerts - Manage required Grant Stages and available Grant Tags - Define permission levels for other User Access Levels (access to reports, ability to create solicitations, override assigned tasks, etc.) <ul style="list-style-type: none"> • Can define and manage system-wide and automatic tasks • Can add and manage Approval Workflow Groups • Can manage the Organization Tags and Subrecipient Management Finding/Audit Tags • Can create grant programs and competitive/non-competitive funding sources for any department
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<p>DMAH (Department Master Account Holder)</p>	<ul style="list-style-type: none"> • See all their agency's departments that are listed in eCivis Grants Network • Have reporting ability within their agency's departments listed in eCivis Grants Network • Can add and manage Approval Workflow Groups • Can run User Activity reports for their departments • Can create grant programs and competitive/non-competitive funding sources in the Agency eCivis user's assigned department(s)
<p>Department</p>	<ul style="list-style-type: none"> • Can research, add, and edit grantee projects • Only have access to the projects they create or to which they are added/assigned • Do not have access to Subrecipient Management (Grantor system)
<p>CBO (Community-Based Organization)</p>	<p>External Partners Collaborating with an Indiana State Agency</p> <ul style="list-style-type: none"> • Can research and add grantee projects • Can edit only the projects they create • Have view-only access to grantee projects to which they are added/assigned • Do not have access to Subrecipient Management (Grantor system)
<p>Auditor</p>	<p>State of Indiana Agency Identified Users</p> <ul style="list-style-type: none"> • Can research and add grantee projects • Can only edit the projects they create • Have view-only access to those grantee projects to which they are added/assigned • Do not have access to Subrecipient Management (Grantor system)
<p>Applicant/ Subrecipient (Portal Account)</p>	<p>External Users</p> <ul style="list-style-type: none"> • Do not have access to the Grantee system (research grants or manage grantee projects) • Can submit subrecipient activity and finance reports • Can request grant amendments • Have no organization or department account management access • Apply for grant opportunities • Manage in-process grant applications