



FastLane Help System

Sponsored Project Office (SPO) Functions

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SPO Functions

Financial Representative Information

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

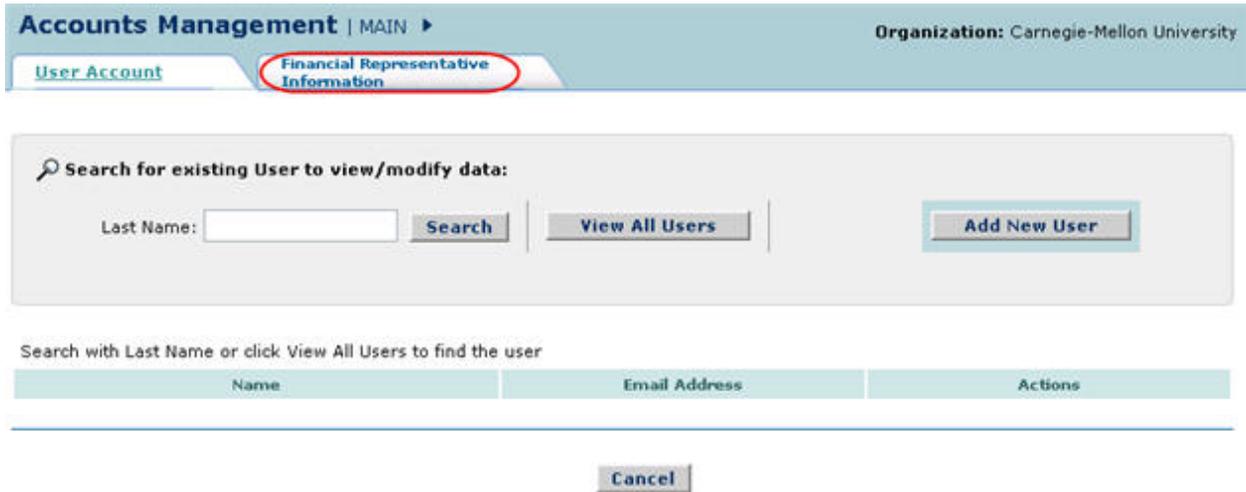


Figure 1 Accounts Management screen on the User Account tab. The Financial Representative Information tab is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click the **Financial Representative Information** tab.
3. Fill in the information for up to three Financial Representatives in the available fields (Figure 2).

Accounts Management | MAIN Organization: Carnegie-Mellon University

User Account Financial Representative Information

Update Financial Representative Information for -- Carnegie-Mellon University Organization ID: 0001057000

Financial Representatives

Salutation:

Name:

Title:

E-mail:

Telephone Number: 10 digits only

Salutation:

Name:

Title:

E-mail:

Telephone Number: 10 digits only

Salutation:

Name:

Title:

E-mail:

Telephone Number: 10 digits only

Submit Changes

Figure 2 The Financial Representative Information page. The fields for one of the Financial Representatives and the Submit button are circled.

4. Once the necessary information for one to three Financial Representatives has been filled out click the **Submit** button (Figure 2).

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.)*

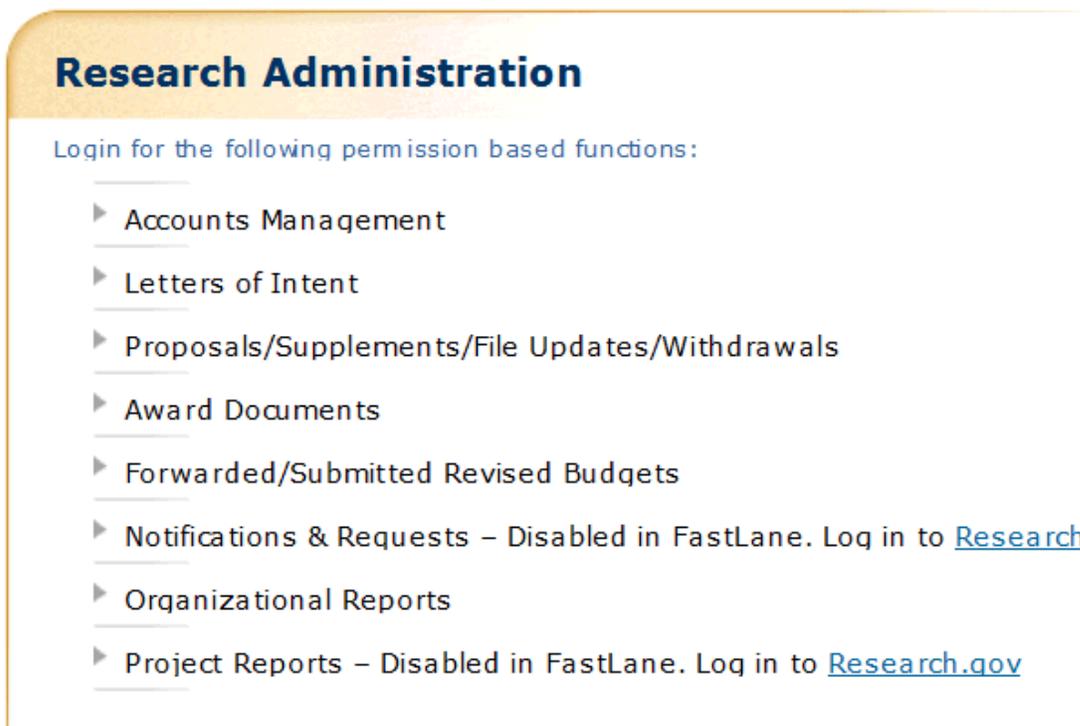


Figure 1 Research Administration screen. This individual has user permissions for all functions carried out in Research Administration.

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 user functions.

User Permission Granted	Function Listed on Research Administration Screen
Add, Modify, and Delete FastLane Users	Accounts Management
Change User Permissions	

Initialize User Passwords	(Within accounts management, you have access only to those functions for which you have permission.)
Review/Revise Organizational Information	
Financial Administrator	
View Only	<ul style="list-style-type: none"> • Organizational Reports • View/Print Organization's Award Letters
Sponsored Projects Officer	<ul style="list-style-type: none"> • Organizational Reports • View/Print Organization's Award Notices • View/Edit Notifications To or Requests For NSF Approvals Under Grants • View/Edit Proposals/Supplements/File Updates/Withdrawals • View/Edit Revised Budgets
Authorized Organizational Representative	<ul style="list-style-type: none"> • Organizational Reports • View/Print Organization's Award Notices • View Project Reports • View/Edit Notifications To or Requests For NSF Approvals Under Grants • View/Edit Proposals/Supplements/Withdrawals • View/Edit/Submit Revised Budgets • Authorized Organizational Representative Functions

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](#)
- [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).



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

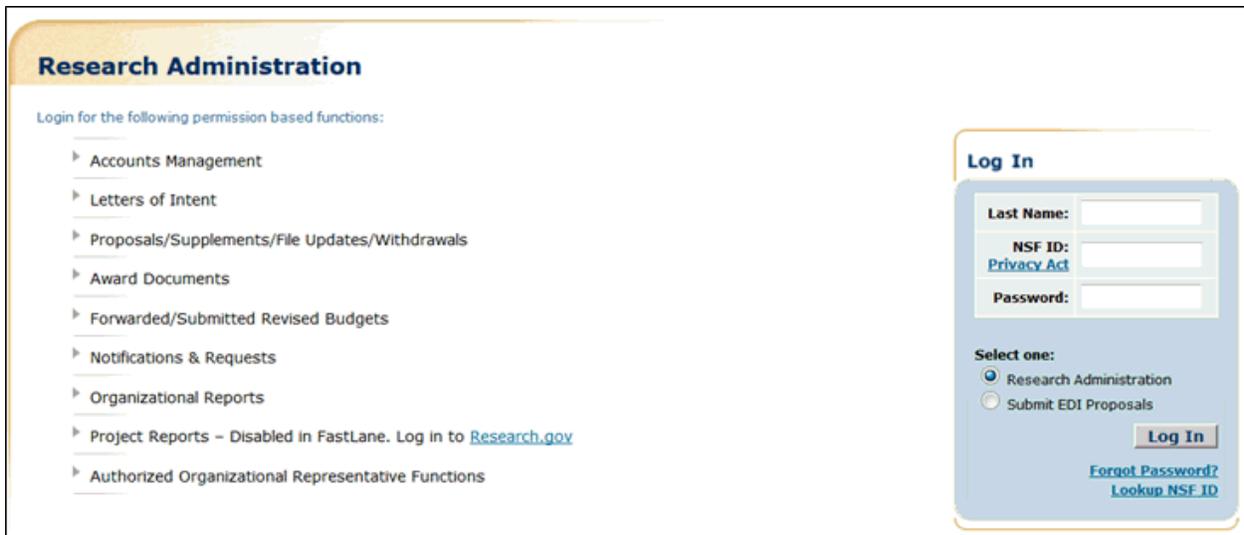


Figure 2 Research Administration Login screen. The Login box, the radio button for Research Administration, and the Login button are circled.

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
 - [Edit/Submit proposals \(AOR only\)](#)
 - [Withdraw a proposal \(AOR only\)](#)
 - [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](#)
 - [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**
- ▶ **Notifications & Requests**
- ▶ **Organizational 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>66</u>	<i>items for review</i>
 Notifications & Requests	<u>8</u>	<i>items for review</i>
 AOR Functions	<u>2</u>	<i>items for review</i>
 Letters of Intent	<u>0</u>	<i>items for review</i>

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

In the **Financial Representative Information** section, you can do the following:

- Input the information for up to three financial representatives

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](#)).

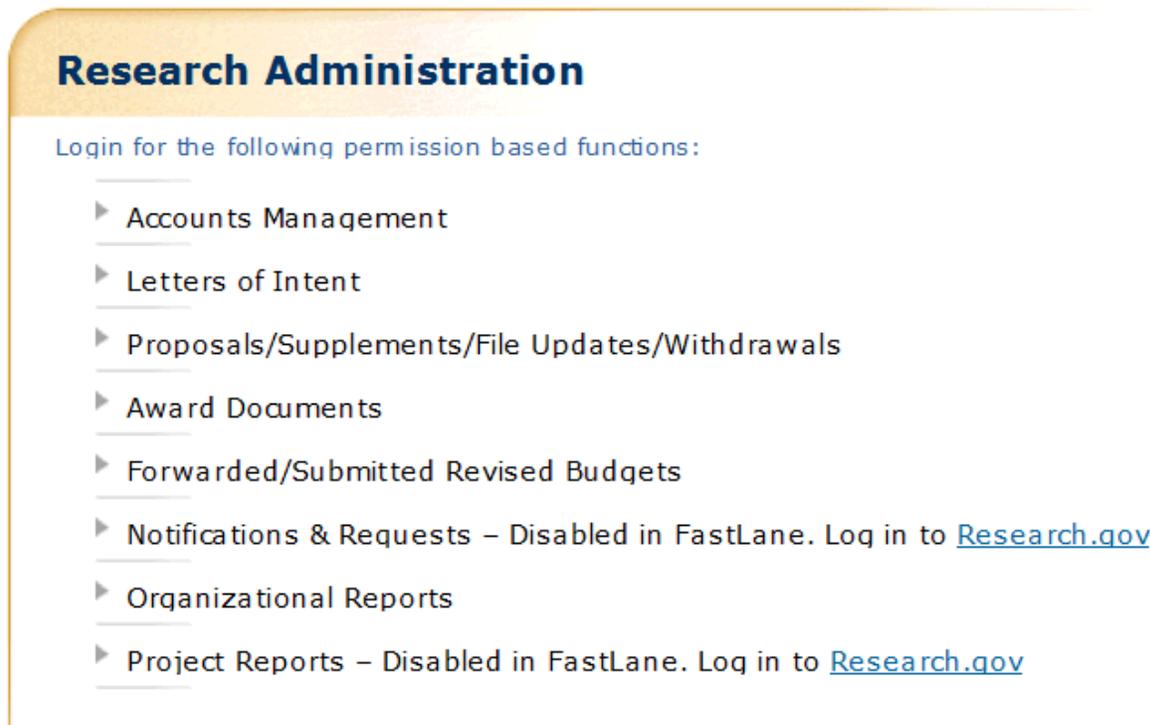


Figure 1 Research Administration screen. The Accounts Management link is circled.

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.)

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 with Last Name or click View All Users to find the user

Name	Email Address	Actions
<input type="button" value="Cancel"/>		

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](#)).



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.)

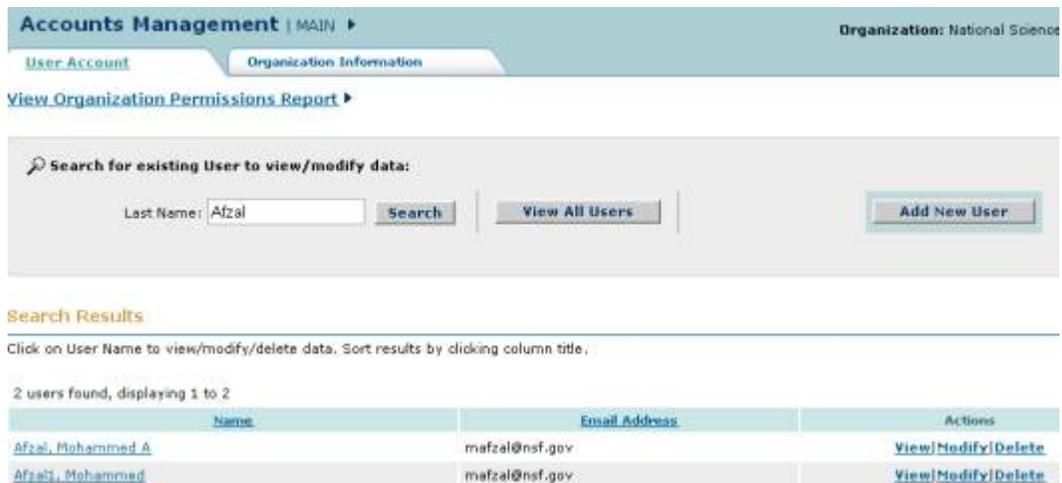


Figure 2 Accounts Management screen with the user's name, email address, and options for action in the Search Results section.

View All Users

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

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

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.)

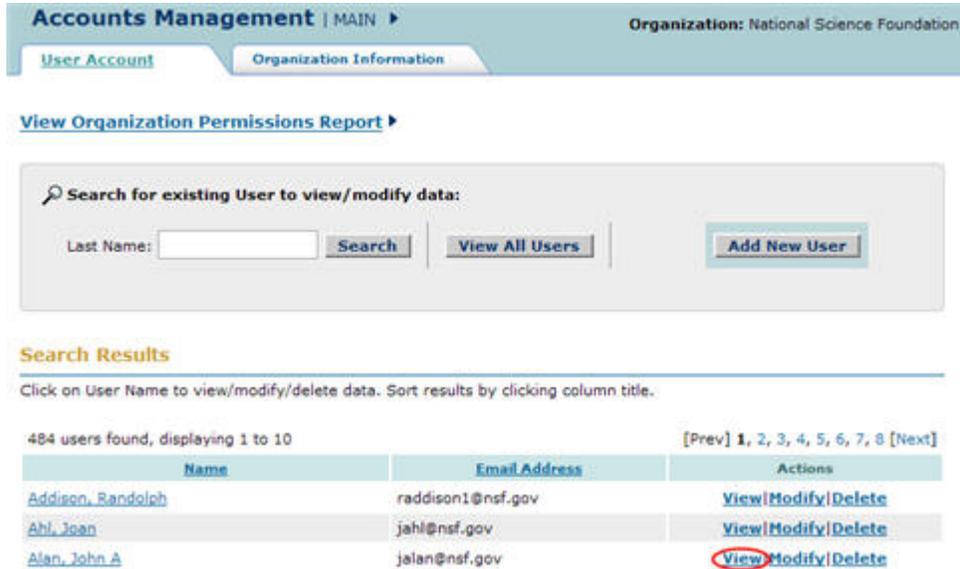
The screenshot shows the 'Accounts Management' interface with the 'View All Users' button clicked. Below the search section, there is a 'Search Results' section. It displays a table with 735 users found, showing the first 10 results. The table has columns for 'Name', 'Email Address', and 'Actions'. The 'Actions' column contains links for 'View', 'Modify', and 'Delete' for each user.

Name	Email Address	Actions
Adams, Gregory G	gadams@nsf.gov	View Modify Delete
Adams, Noel	nadams@nsf.gov	View Modify Delete
Addison, Randolph	raddison@nsf.gov	View Modify Delete
Afzal, Mohammed A	mafzal@nsf.gov	View Modify Delete
Afzal, Mohammed	mofzal@nsf.gov	View Modify Delete
Ahl, Joan	jahl@nsf.gov	View Modify Delete
Ahlen, John W	john.ahlen@mail.state.ar.us	View Modify Delete
Albus, Cheryl F	calbus@nsf.gov	View Modify Delete
Anderson, Lara A	lalderon@bearingpoint.net	View Modify Delete
Anderson, Lynn A	lynnald@hotmail.com	View Modify Delete

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](#)).



The screenshot shows the 'Accounts Management' interface for the 'National Science Foundation'. It features a search bar with the text 'Search for existing User to view/modify data:' and buttons for 'Search', 'View All Users', and 'Add New User'. Below the search bar, there is a 'Search Results' section with a table of users. The table has three columns: 'Name', 'Email Address', and 'Actions'. The 'View' 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 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](#)

*First Name: John MI: A **Modify User**

*Last Name: Alan

*Email: jalan@nsf.gov

Phone Number: 7035551000 **Delete User**

Fax Number: 7035550000

Cancel

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

alphanan , 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 [Privacy Act](#)

*First Name: MI:

*Last Name:

*Email:

Phone Number: 10 digits only

Fax Number: 10 digits only

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

Modify User

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

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.

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 Modify User

*Last Name: Alan

*Email: jalan@nsf.gov

Phone Number: 7035551000 Delete User

Fax Number: 7035550000

Cancel

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

alphanan , 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

Delete User Cancel

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.

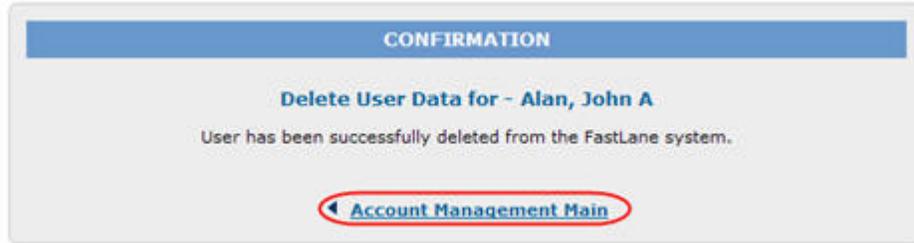


Figure 8 Confirmation screen. The Account Management Main link is circled.

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](#)).

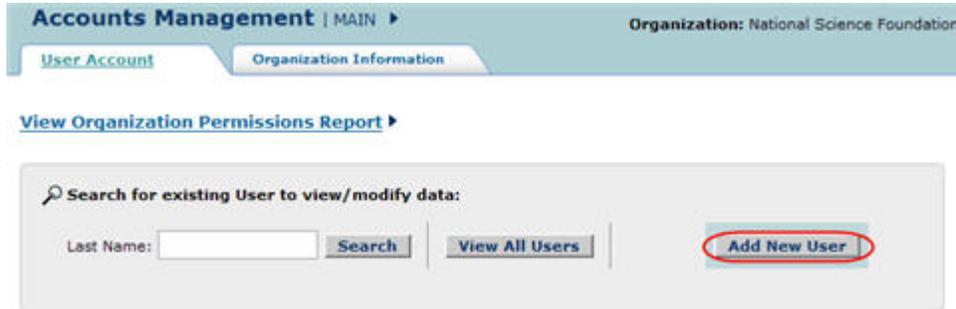


Figure 1 Accounts Management screen. The Add New User button is circled.

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).

Figure 2 Add New User screen.

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. 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 someone in your organization is authorized to sign and submit proposals and other documents that require electronic signature, you must give that person the permission for Authorized Organizational Representative Functions.*

7. *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.
8. 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.

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

User Account

View Add User Profile for -- john billy **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:** billy
***Email:** john.billy@nsf.gov
Phone Number:
Fax Number:

MI :

Principal Investigator (PI) Profile

Suffix:
Department:
***Degree Type:**
***Degree Year:** 0
ORCID Identifier:

User Permissions Assigned

Figure 3 View Add User Profile screen.

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

CONFIRMATION

Add User Data for - jorge Ruiz

User has been successfully added to the Research.gov and Fastlane.
User has been added as a PI successfully.
User Permissions have been successfully added.

Please note your NSF ID generated by the system is **000569572**

The user has been sent an email with further instructions for signing in. Please note that you will need to give the user temporary password you created, and after 30 minutes user will be able to sign into Research.gov, where they will be prompted to change their password.

[Account Management Main](#)

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

10. 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](#)).

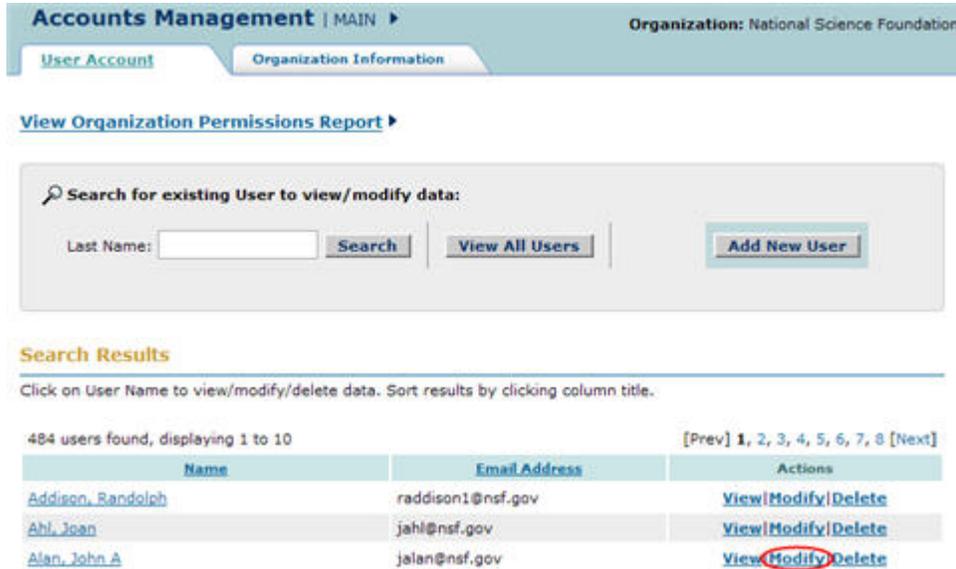


Figure 1 Accounts Management screen. The Modify link is circled.

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).

The screenshot shows the 'Modify User Profile' screen for user ARO TEST. The form is divided into several sections: 'User Profile', 'Already a Principal Investigator (PI)', and 'User Permissions'. The 'User Profile' section includes fields for NSF ID, First Name, Last Name, Email, Phone Number, and Fax Number. The 'Already a Principal Investigator (PI)' section includes fields for Department, Degree Type, Degree Year, and ORCID Identifier. The 'User Permissions' section includes radio buttons for 'None', 'View Only', 'Sponsored Projects Officer', and 'Authorized Organizational Representative'. The 'Authorized Organizational Representative' option is selected.

Organization ID: 4102852000

Change Password:
The password change function is no longer available in Accounts Management. Users can now change their own passwords using the Change Password link available in FastLane on the top right, or by selecting 'Change Password' from Research.gov's My Profile page.

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:

- None
- View Only
 - Organizational Reports
 - View/Print Organization's Award Notices
 - View Project Reports
- Sponsored Projects Officer
 - Organizational Reports
 - View/Print Organization's Award Notices
 - View Project Reports
 - View/Edit Notifications To or Requests For NSF Approvals Under Grants
 - View/Edit Revised Budgets
 - View/Edit Proposals/Supplements/Withdrawals
- Authorized Organizational Representative
 - Organizational Reports
 - View/Print Organization's Award Notices
 - View Project Reports
 - View/Edit Notifications To or Requests For NSF Approvals Under Grants
 - View/Edit Proposals/Supplements/Withdrawals
 - View/Edit Revised Budgets
 - Authorized Organizational Representative Functions

Add, Modify, and Delete FastLane Users
 Change User Permissions

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 -- AAabbcdd Aa 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

<p>NSF ID: 000603958 *First Name: AAabbcdd *Last Name: Aa *Email: bcraze@nsf.gov Phone Number: 1113339999 Fax Number: 1113339998</p>	<p>Privacy Act MI: C</p>
---	---

Principal Investigator (PI) Profile

<p>Suffix: Department: Econ *Degree Type: DAg *Degree Year: 1969 ORCID Identifier:</p>	
--	--

User Permissions Assigned

Sponsored Projects Officer

download [Adobe Acrobat Reader](#) for viewing PDF files

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).



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

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](#)).

The screenshot shows the 'Accounts Management' interface for the National Science Foundation. It includes a search bar with 'Last Name:' and buttons for 'Search', 'View All Users', and 'Add New User'. Below is a 'Search Results' section with a table of users. The 'Delete' link 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 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.

The screenshot shows the 'Delete User Data for -- John Alan' screen. It includes a warning message: 'ARE YOU SURE? Clicking "Delete User" will remove this user from the FastLane and Research.gov systems. Click "Cancel" to return to previous screen.' Below the message are user details and a 'Delete User' button circled in red.

NSF ID: 000484219 [Privacy Act](#)

*First Name: John MI: A Suffix:

*Last Name: Alan

*Email: jalan@nsf.gov

Phone Number: 7035551000

Fax Number: 7035550000

[Delete User](#) [Cancel](#)

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.

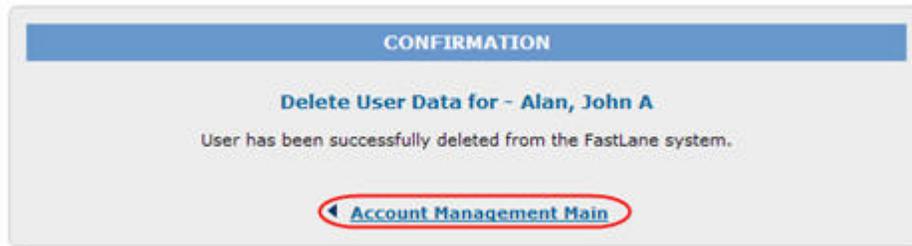


Figure 3 Confirmation screen. The Account Management Main link is circled.

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](#)).

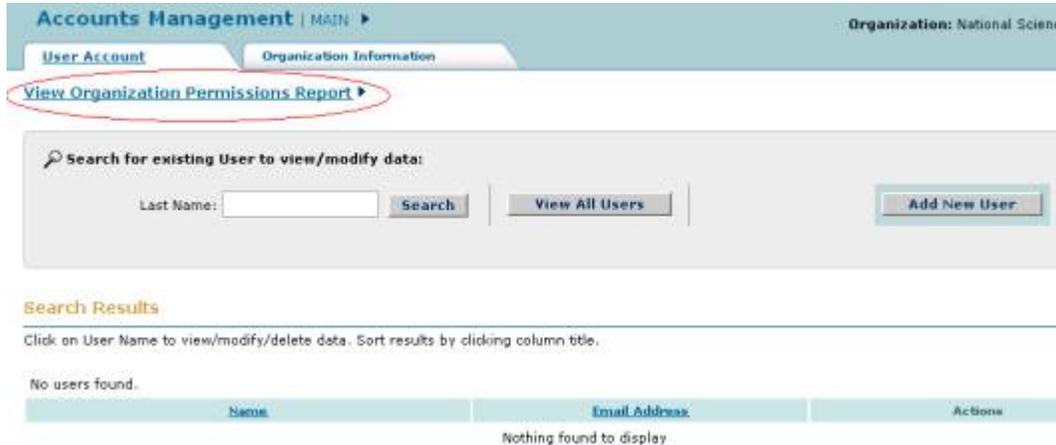


Figure 1 Accounts Management screen on the User Account tab. The View Organization Permissions Report link is circled.

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](#)

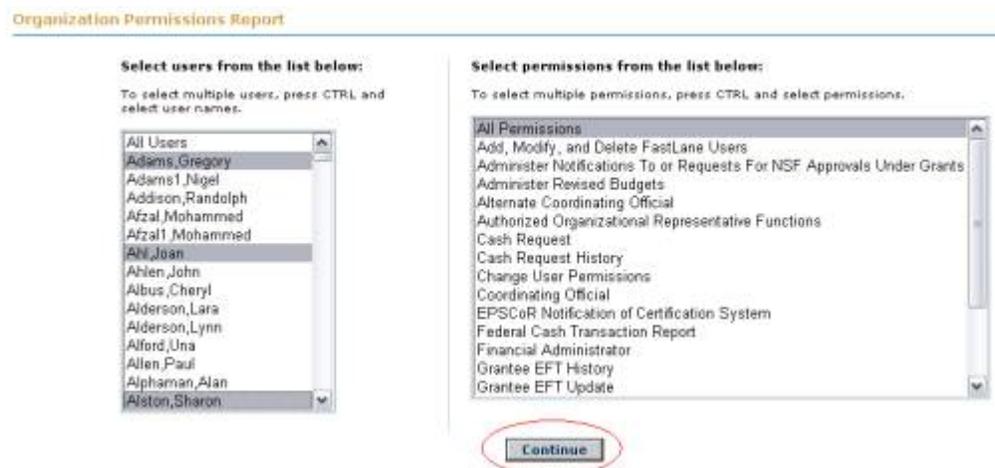


Figure 2 Organization Permissions Report screen. Three user names and All Permissions are highlighted. The Continue button is circled.

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
- Afzal1, Mohammed
- Ahl, Joan
- Ahlen, John
- Albus, Cheryl
- Alderson, Lara
- Alderson, Lynn
- Allford, 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	cb Bailey@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	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
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'. The 'Organization Information' tab is highlighted with a red circle. Below the tabs, there is a search bar for existing users and a button to 'Add New User'. At the bottom, there is a table 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 (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, DUNS number, and DUNS qualifier. A red circle highlights the 'Submit Changes' button at the bottom of the form.

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.

CONFIRMATION

Update Organization Info for - NSF

Organization Information has been successfully updated.

[← Account Management Main](#)

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'. 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 three buttons: '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. The **Revise Information** screen displays (Figure 2).

The screenshot shows the 'Revise Information' screen for the 'National Science Foundation'. The page title is 'Revise Information for -- National Science Foundation' and the 'Organization ID' is '4102852000'. Below the title, there is a section for 'Organization Profile' with various fields for organization details. At the top right of the form, there is a link labeled 'Request Change of Organization Name', which is circled in red. At the bottom of the form, there are two buttons: 'Submit Changes' and 'Cancel'.

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: 4102852000
Required Fields are preceded by an asterisk (*) -- Prepopulated Fields denote pending request

Organization ID: 4102852000

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

Short Name:

*Award Letter E-mail Address:

Recipient Name:

Active Awards: no

Additional Comments:

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.



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](#)).



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 displays the 'Revise Information for -- NSF' screen. The organization ID is 4102852000. The form includes fields for:

- *Organization Name: NSF
- *Address 1: 4201 Wilson Boulevard
- Address 2: (empty)
- *City: Arlington
- *State: Virginia
- *Zip: 222301000
- *Country: United States
- *E-mail: fastlane@nsf.gov
- *Telephone Number: 7032927151 (10 digits only)
- Fax Number: 7032923465 (10 digits only)
- *EIN/TIN: 324325436
- *DUNS Number: 112233444
- DUNS Qualifier: jnti

 A red-bordered box on the right contains the message: 'An Organization Change Request is Pending: New National Science Foundation'. A link 'Request Change of Organization Name' is located above this message.

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
- [Active awards](#)
Search for awards with the option to view the abstract for an award
- [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).

Organizational Reports | MAIN ▶

Select Organization Name: National Science Foundation ▼

Indicate Report Type:

- Recent Proposals**
- Active Awards**
- Continuing Grant Increments**
- Organization Permissions Report**

Continue

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](#)
 - [Active awards](#) listing
 - [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 ▶

Select Organization Name: National Science Foundation ▼

Indicate Report Type:

- Recent Proposals
- Active Awards
- Continuing Grant Increments
- Organization Permissions Report

Continue

Figure 1 Organizational Reports screen.

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

Continue

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.

52 Proposals found, displaying 1 to 10 [< Previous 10] 1, 2, 3, 4, 5, 6 [Next 10 >]

Division	Proposal Number	Proposal Title	PI Name	Status	Status Date	Requested Amount	Program Officer
DIS	2220050	DIS NSF USE - Diary Notice Permission Testing	PIU, Test	Awarded	01/27/2013	\$95.00	elizabeth PD-EG
DIS	2220055	DIS NSF USE - Diary Notice Permission Testing	PIU, Test	Awarded	01/28/2013	\$95.00	elizabeth PD-EG
DIS	2220056	DIS NSF USE - Diary Notice Permission Testing	PIU, Test	Awarded	01/27/2013	\$95.00	elizabeth PD-EG
DIS	2220179	DIS NSF USE - March Release (Diary Notice Testing)	PIU, Test	Declined	02/14/2013	\$95.00	elizabeth PD-EG
IIS	0707531	PRD 11/18/06 Release Functional Verification 2	Dale, Eric	N/A	04/23/2010	\$0.00	
IIS	0707533	PRD 11/18/06 Release Functional Verification 3	Dale, Eric	N/A	04/08/2010		
IIS	0707535	PRD 11/18/06 Release Functional Verification 5	Dale, Eric	N/A	05/25/2010		
IIS	1035139	PRD 11/18/06 Release Functional Verification 1	Dale, Eric	N/A	04/02/2010	\$0.00	
DBI	1062346	elizabeth Test Proposal for 1062338	Hightman, Alan	N/A	06/10/2010		
OCE	1062358	Workshop for PI's Of The Research Experience For Undergraduate (REU) Program	Brown, Melbourne	N/A	06/22/2010	\$127,420.00	

Transfer Data to: [Excel](#)

[Cancel](#)

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 NETWO**
 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 Recent Proposals Reports](#)

View Active Awards

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
- Active Awards
- Continuing Grant Increments
- Organization Permissions Report

Continue

Figure 1 Organizational Reports screen.

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 : 01/01/2011 To : 03/01/2011

Award Number:

 (Enter 7 digits)

Status Change occurring anytime after the following date:

Sort results by:

- Award Expiration Date
 Award Number

Continue

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:
 - **Award End 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.

3 Awards found, displaying 1 to 3

1

Award Number	PI Name	Total Award Amount	Award Title	Expiration Date	FPR Due Date	FPR Overdue Date
2220056	PII, Test	\$3.00	SD NOT USE - Diary Notice Permission Testing	05/31/2012	06/01/2012	08/30/2012
2220050	PII, Test	\$6.00	SD NOT USE - Diary Notice Permission Testing	05/31/2012	06/01/2012	08/30/2012
2220055	PII, Test	\$5.00	SD NOT USE - Diary Notice Permission Testing	09/30/2011	10/01/2011	12/30/2011

Transfer Data to: Excel

Cancel

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.



Figure 4 NSF Award Abstract screen.

View Continuing Grant Increments

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



Figure 1 Organizational Reports screen.

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).

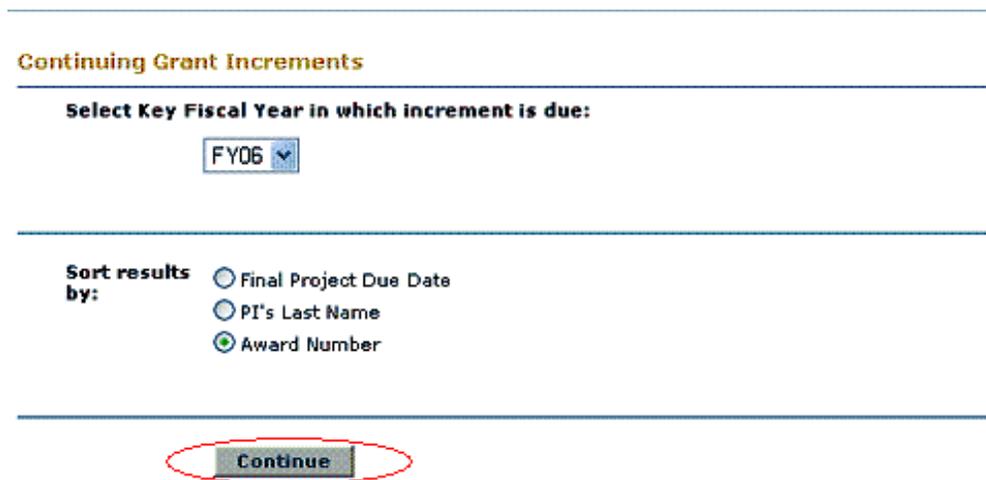


Figure 2 Continuing Grant Increments screen. The Continue button is circled.

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 Populations 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](#).

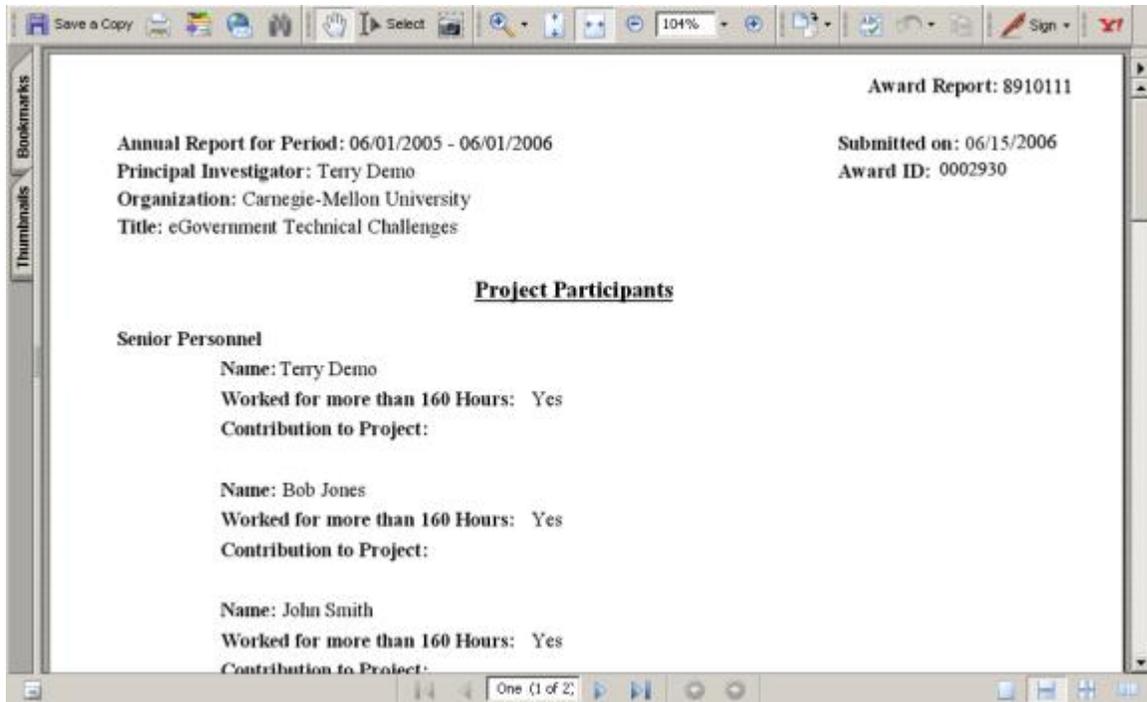


Figure 5 Screen with the selected report in PDF format.

View User Permissions Report

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

Figure 1 Organizational Reports screen.

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.

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
- Afzall, 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.

- 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	kchetia@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
Bailey, 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

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

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

Afzali, Mohammed

Ahl, Joan

Ahlen, John

Albus, Cheryl

Alderson, Lara

Alderson, Lynn

Ailford, 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

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	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
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.