Northern Border Regional Commission

Your GMS Account and Contacts

Use the following guidance to set up and make edits to the points of contact for your organization, assign system user permissions, and more.

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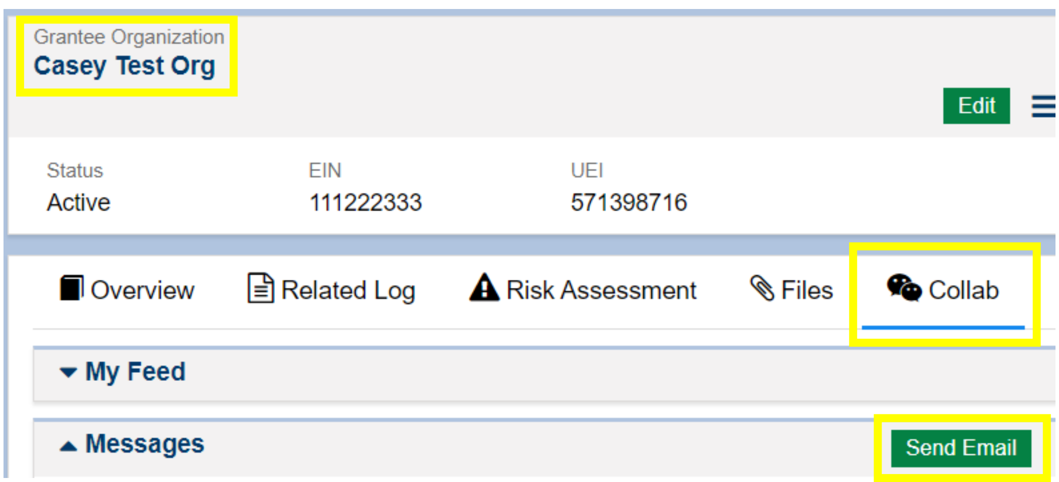
Organization Profile

If the top of your page says “Grantee Organization” you are viewing your organization profile and the following sections are applicable.

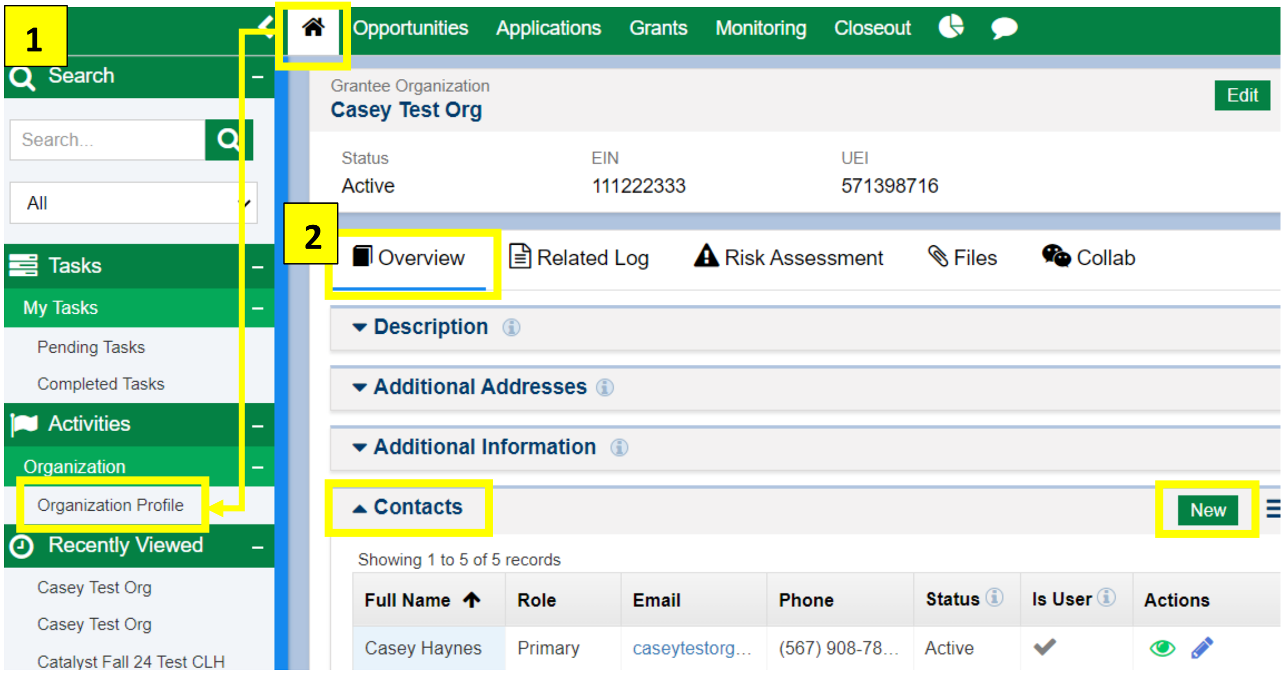
For additional assistance with your **Organization Profile**, click the Collab tab, click Send Message, and direct your request to admin@nbrc.gov



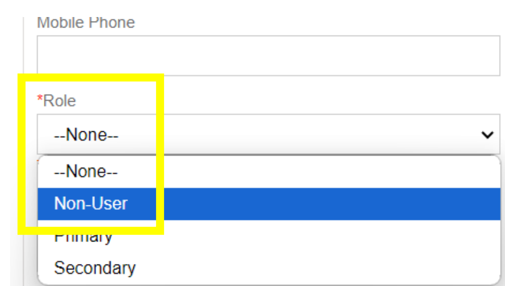
Adding Contacts

You can list as many contacts as desired on your organization’s account, but <u>only two people can be given GMS access at a time</u>.

1. Make sure you are on the Home page, then click Organization Profile in the lefthand navigation bar
2. Making sure you are on the Overview tab, scroll down to the Contacts section and click the New button:



3. In the Create Contact window, fill out the relevant information and make sure to <u>set the Role for this new contact as a Non-User</u> and click Save



The new contact you created will now appear on your Organization's profile page and signals to NBRC that we have permission to discuss account information with this individual.

NOTE: If you are working with a LDD, **do not** list them as a contact here. Scroll to the Project Contacts section to see how to associate an LDD partner with your project.

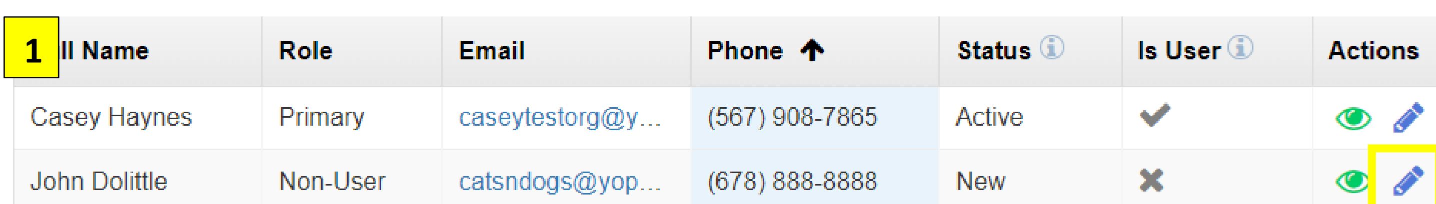
Assigning or Updating GMS Users

Notice the "Primary" and "Secondary" options under Role in the step above.

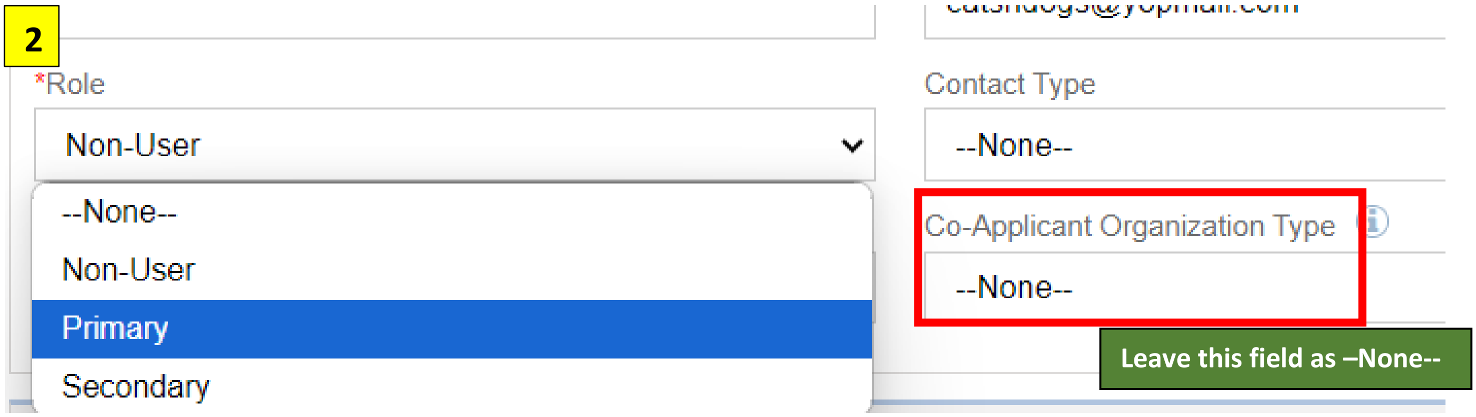
- Secondary: can log into the GMS and view account information, can make edits to open application and grant administration tasks.
- Primary: able to see and click the Submit and similar buttons in order to finalize those activities. Can have both contacts set up as Primary if desired.

You can only have two Primary/Secondary contacts, so once you've decided which two users should be able to access the GMS and conduct activity on behalf of your organization

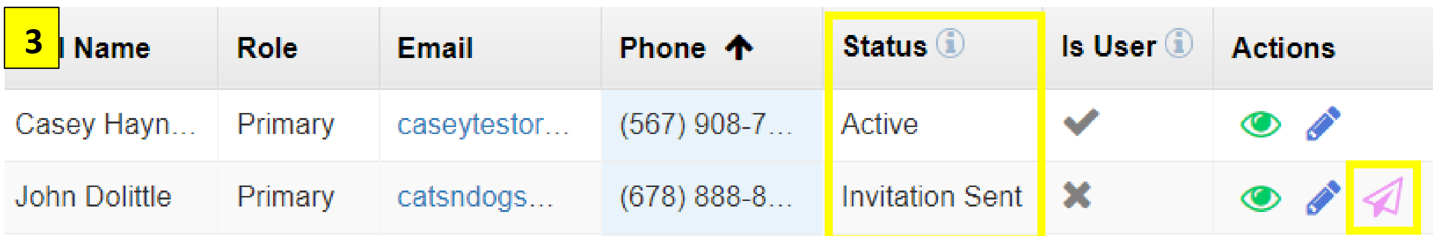
1. Click the blue pencil icon under the Actions column to edit the contact information:



2. Update the Role and click Save. NOTE: Leave Co-Applicant Type as "—None—" otherwise you will not be able to complete the following step



3. There will now be a paper airplane icon ( ) under the Actions column. Click that icon to send an email that will prompt them to create their user account. They have 72 hours to accept the invitation or it will expire, and you will need to re-send the invitation. The Status column will show "Invitation Expired" if too much time has elapsed. Status will change to "Active" once they have accepted the invitation and finalized their account.



Name	Role	Email	Phone	Status	Is User	Actions
Casey Hayn…	Primary	caseytestor…	(567) 908-7…	Active		
John Dolittle	Primary	catsndogs…	(678) 888-8…	Invitation Sent		

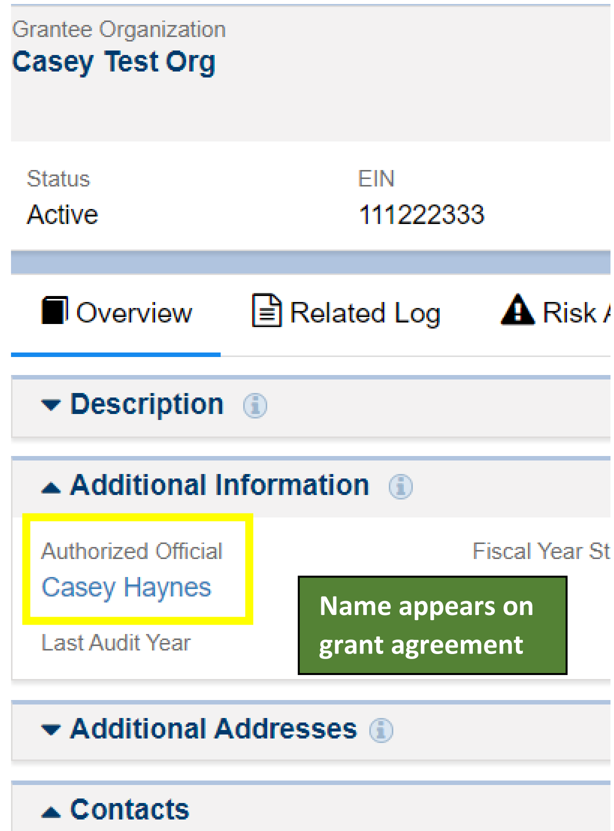
NOTE: If you already have two Primary/Secondary users showing as Active but need to give a different contact access to the GMS, first make sure the contact is created as a Non-User and then the Authorized Official should contact NBRC with:

- Name and desired Role (Primary vs Secondary) for your existing Non-User contact
- Name of existing contact to be deactivated and changed to Non-User. Their contact information will remain on your organization profile but will not have access to the GMS.

NBRC will make changes on the backend and then send the invitation on your behalf for the new user to finalize their user access.

Updating Your Authorized Official

By default, the individual who creates the organization account in the GMS becomes listed as the organization's Authorized Official (AO). You can view the current AO under the Additional Information section of your Organization Profile. This individual is the name that will appear on and sign grant agreements.



Any Active contact given Primary access (See [Assigning or Updating GMS Users]) can be listed as the project's AO.

<u>To update your organization's AO to an existing Primary contact:</u>

1. The current AO should contact NBRC with the name of the existing contact to be made AO
    a. NBRC will confirm once the change has been made

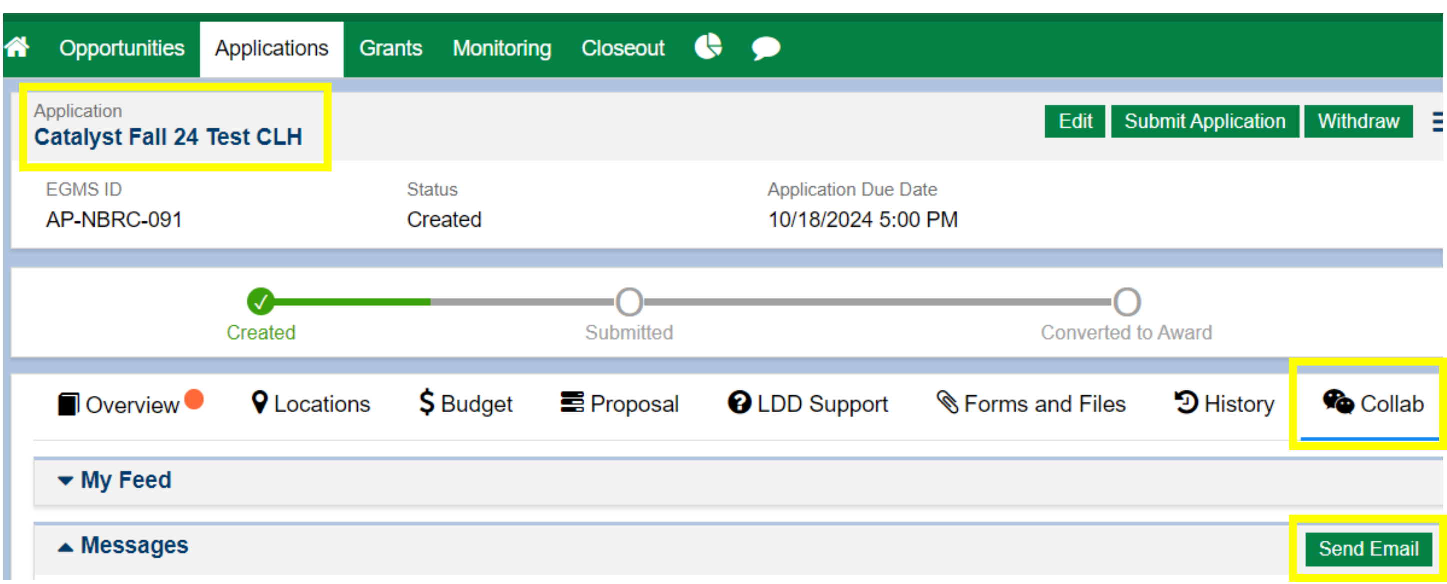
<u>If the new AO is net yet a user of the GMS:</u>

1. Follow the steps in [Adding Contacts] to add the new AO as a Non-User
2. The current AO or representative of the organization's governing body should contact NBRC naming the new AO
    a. NBRC will make changes on the backend and then send the invitation on your behalf for the new user to finalize their user access
3. Once the new AO has finalized their account and has successfully logged in, they must contact NBRC to finalize the change of AO on the organization profile
    a. NBRC will confirm once the change has been made

Project Contacts: Applicants

Project contacts are existing contacts in the GMS that you can associate with your project. Associating a project contact does not give that contact access to your project record—NBRC will conduct project-related outreach to anyone listed as a contact on your project.

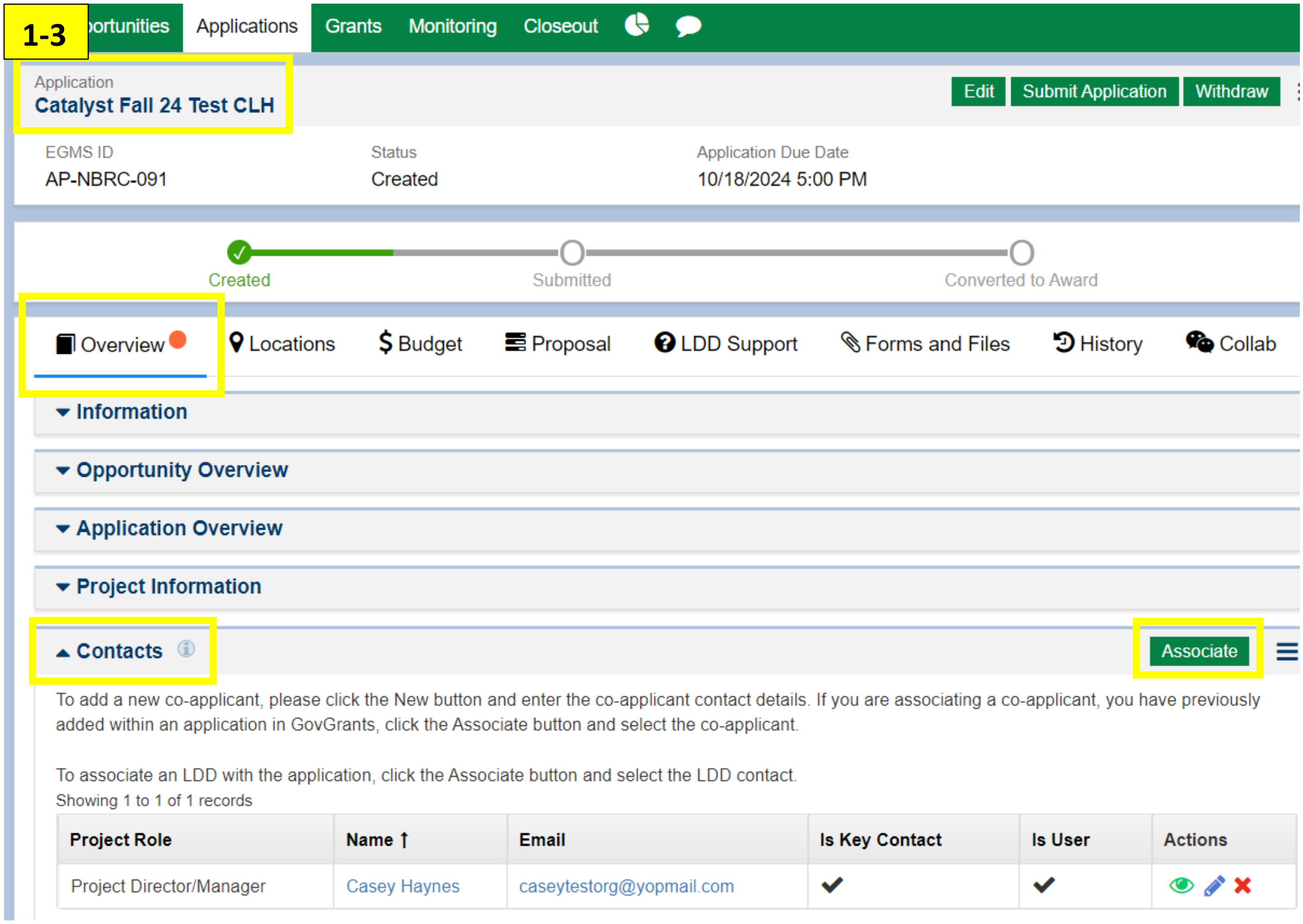
For assistance with your **Project Contacts**, navigate to your Application record, click into the Collab tab and then Send Email, directing your message to [admin@nbrc.gov].



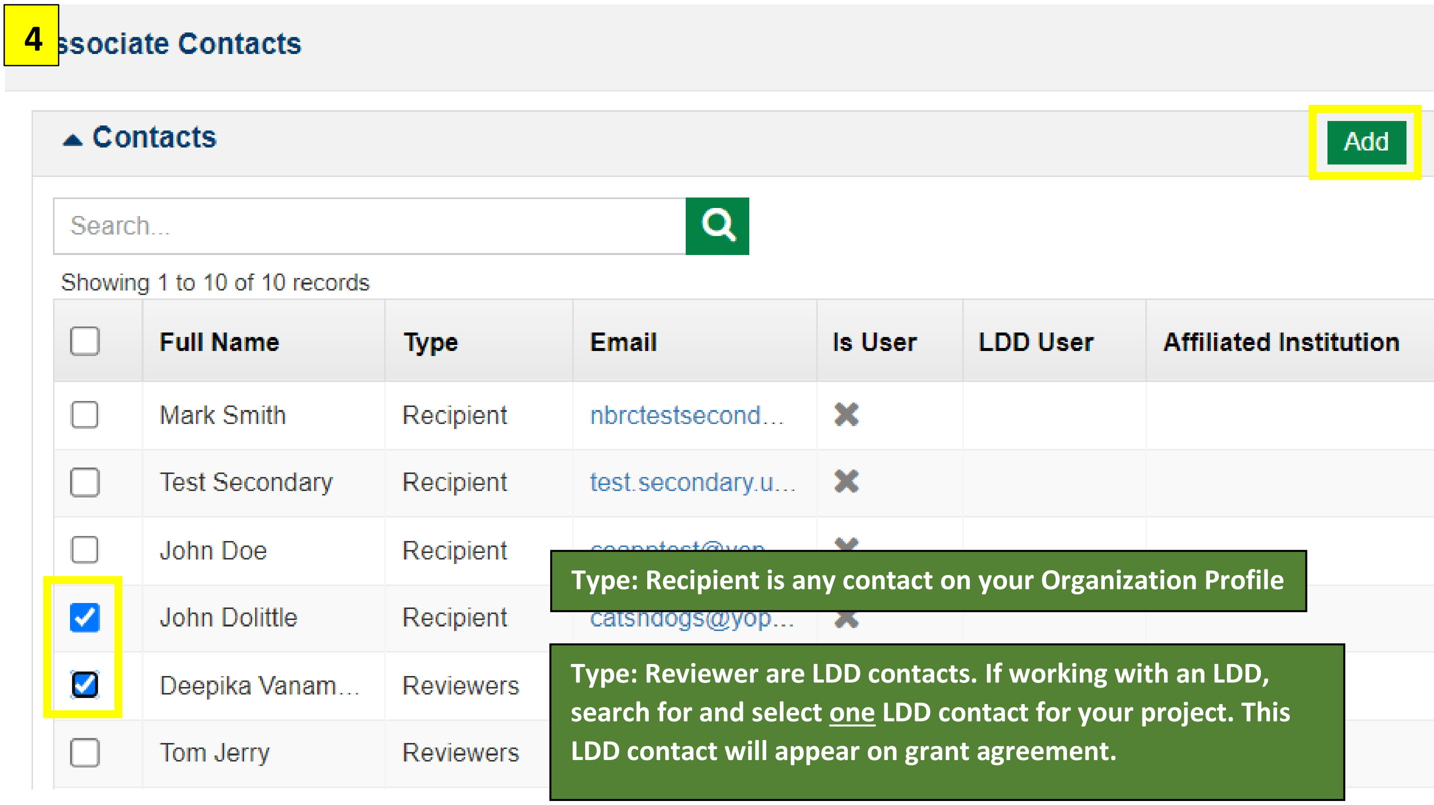
Associating Project and LDD Contacts

Whoever creates the application record will be that record's owner and set up as a project contact by default. You can view your project's current contact list by

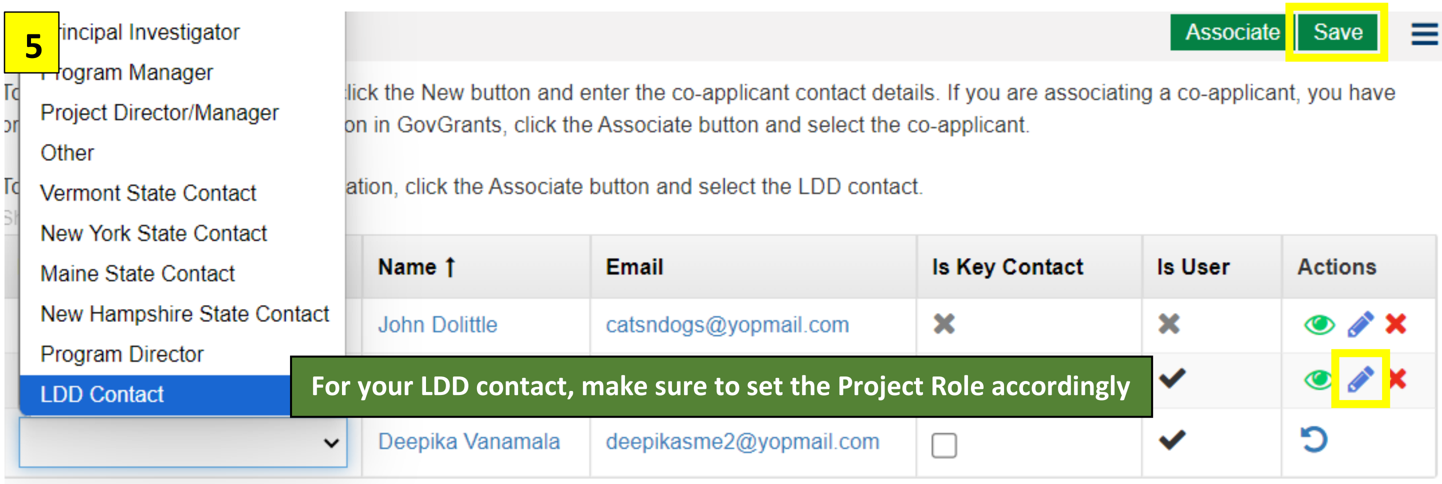
1. Navigating to your application record
2. Scroll down on the Overview tab
3. On the Contacts section, click Associate button



4. In the Associate Contacts window, check the boxes for each contact you would like to associate to the project record, and click Add.
   a. If working with a Local Development District (LDD), you can use the search bar to look up and add that contact to your project record. Associate only one LDD contact with your record—that contact will appear on your grant agreement.
   b. Associating does not give a LDD contact access to your project details—see NBRC's Creating and Submitting an Application for guidance on requesting LDD reviews and giving edit access.



5. When the page refreshes, you can click the blue pencil icon( ) to edit the Project Role for each contact and click Save.
    a. Be sure to set your LDD contact's role to "LDD Contact"



Project Contacts: Awardees

Additional guidance forthcoming