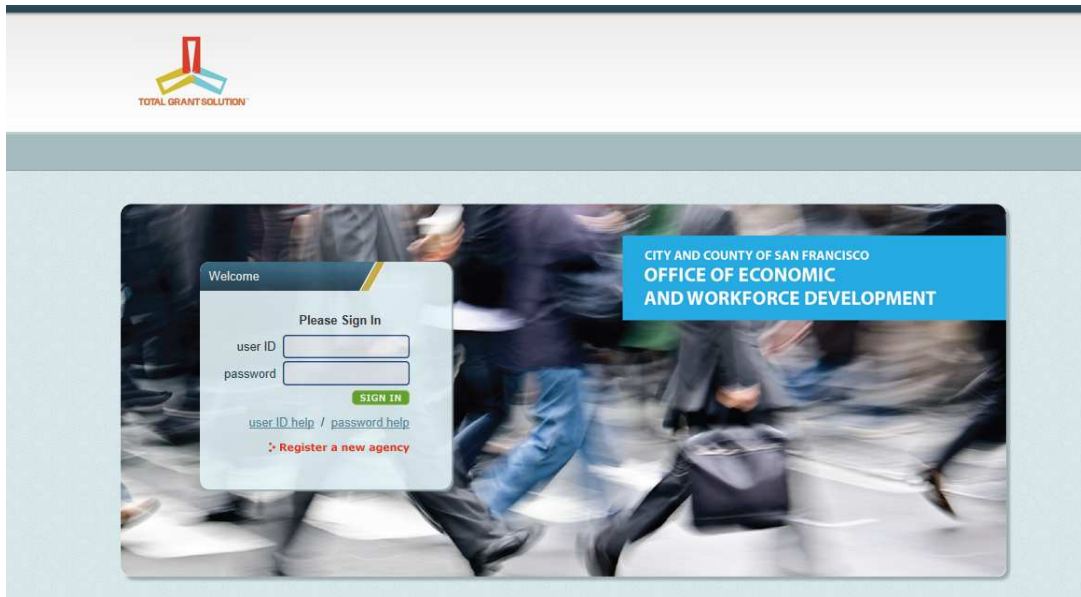


How to add a user, delete a user, or change a user's permissions in TGS:

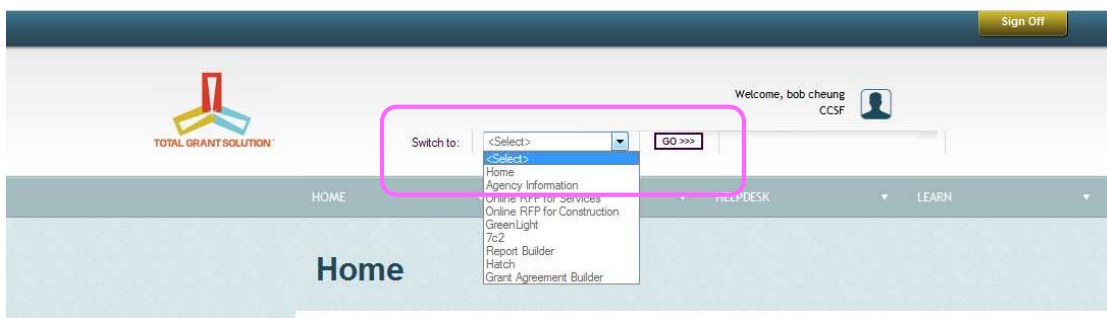
OEWD's version of TGS can be found at:

<https://totalgrantsolution.org/tgsewd/MasterLogon/>



Log onto TGS with an organizational level log on and password – these are generally held by the Executive Director or their designee.

Choose “agency information” from the drop down list.



Once the agency information page appears, choose the “general” tab at the top of the screen then scroll to the middle of the page where users are displayed.

Sign Off

Welcome, CCSF

Switch to: <Select> GO >>>

CONTACT GENERAL FINANCIAL

Agency Info

Please review your Agency Information below and update fields as needed. Once done, click the 'Submit' button to the right or at the bottom of this page to save your data. Fields with an asterisk (*) are required.

Click to save agency info: submit

Full Time Employees

To edit or delete a user: Click on the appropriate link at the far left of the line and follow the instructions on the screen. This is the area where you can change permissions for users. An organization may have one or many users with “organizational administrator” designation.

Note: “Organizational Administrator” is the only permission level allowed to submit a proposal on an agency’s behalf in the online RFP module and the only permission level allowed to submit monthly invoices. Data entry level access will allow users to enter the assigned level of information (financial or program) but those users will not have a “submit” button available to them.

Agency Users

Use this section to add/edit/delete users who will have access to TGS (Total Grant Solution) tools.

GreenLight is used for online Grant Agreement negotiation. Only Organization Admin level users have access to GreenLight.

7c2 is used by funded agencies to report monthly results and submit reimbursement requests.

To add a new user, click the **"Add User"** link, complete the fields, then click **"Update."**

To edit a user's information, click the **"Edit"** link next to that user, change the fields, then click **"Update."**

To delete a user, click the **"Delete"** link, then click **"Delete"** in the confirmation box (note: once deleted, information cannot be retrieved).

For **"User Level"** choose the level based on the type of access a user may have on the 7c2 system (i.e., for users who need to enter data, choose the appropriate data entry level; for users who never need to enter data, but require information from the system, choose the appropriate read-only level; for users who need FULL access, including submission rights, choose "Organization Administrator," but note that this level should be limited to only one or two high level people - also note that only "Organization Administrators" have access to GreenLight, the Total Grant Solution online negotiation system).

Under "Uses RFP" and "Uses 7c2," click the box or boxes that match the system(s) the user will use (i.e., if the person you are adding will be using 7c2, but not the RFP site, then check only the 7c2 box).

	Last Name	First Name	User ID	Password	User Level	E-Mail	Uses RFP	Uses 7c2
Edit Delete							<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Delete							<input type="checkbox"/>	<input type="checkbox"/>
Edit Delete							<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Delete							<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

To add users:

Below the table of users, click on “add user”

The screenshot shows a user management interface. At the top, there are two rows of 'Edit' and 'Delete' buttons. Below these, the 'Add User' button is highlighted with a pink rectangular box. The interface has a light blue background with a yellow horizontal bar and a dark blue bar labeled 'Officers'.

A new line will appear in the user table where the new user's name, password, user level, and types of uses can be set. The instructions on the screen give additional information about each field. When finished, click "update" to the left of the line where the new user has been added.

This screenshot shows a table with columns: Last Name, First Name, User ID, Password, User Level, E-Mail, Uses RFP, and Uses 7c2. A new user entry is shown with Last Name 'Mouse', First Name 'Mickey', User ID 'aa2741', and Password '123GCF'. The 'Update' button to the left of this row is highlighted with a pink box. The 'User Level' dropdown menu is also highlighted with a pink box and is open, showing options: Read Only All, Board Member, Data Entry All, Organizational Administrator, Read Only Program, Read Only Financial, Data Entry Program, and Data Entry Financial. Above the table, instructions state: 'Under "Uses RFP" and "Uses 7c2," click the box or boxes that match the system(s) the user will use (i.e., if the person you are adding will be using 7c2, but not the RFP site, then check only the 7c2 box).' The 'Uses RFP' and 'Uses 7c2' checkboxes for the new user are checked.

Scroll back to the top or down to the bottom of the screen and click the orange "submit" button for the changes to be saved.

The screenshot shows the 'Agency Info' page. At the top, there is a 'Sign Off' button. Below the header, there is a 'TOTAL GRANT SOLUTION' logo, a 'Switch to:' dropdown menu, and a 'GO >>>' button. The main content area is titled 'Agency Info' and contains instructions: 'Please review your Agency Information below and update fields as needed. Once done, click the "Submit" button to the right or at the bottom of this page to save your data. Fields with an asterisk (*) are required.' The 'submit' button is highlighted with a pink rectangular box.