

Subject: FDP Expanded Clearinghouse – Web-based system Tips!

Hi Piloteers!

Hopefully you have all received and read the email regarding the go-live of the web-based system on April 26th!

The go-live email and instructions provided great information for you, but we also wanted to provide a bit of info here on items that have happened or we have learned about since go-live that might be helpful as you work on finishing up and submitting your Profiles! Please see this information and tips below.

Reminder: Profiles are due by COB May 10th!!

Web Browser

For best experience, we recommend using the latest version of Google Chrome. Current versions of other popular browsers are also supported, such as Firefox, Internet Explorer/Edge and Apple Safari. Internet Explorer versions 9 and older are not supported and may experience issues—in this case an upgrade is strongly recommended.

Account creation for Org Points of Contact

- All accounts have been created for the Profile Points of Contact (POC) which now become the “Org Owners” in the system. If you are one of these POC’s and have not received your account creation email with your password, please let us know via fdpechelp@gmail.com.
 - All Organization Owners should have permissions to create an entity Profile and update users. If at any time, a user who is the Organizational Owner cannot update the Profile, please email fdpechelp@gmail.com.
 - Organizational Owners must update their own user permissions to also be a Profile Certifier. Please do not remove other permissions when adding the Profile Certifier permission.

Profiles submitted and FDP Admin review/publishing

- As of today we have published 29 Profiles! 100 more to go! Keep them coming on in 😊 **Please get your Profiles in by the deadline so we can move forward with bringing on Cohort 3!**
- Once you submit your Profile it will be reviewed within 2 business days and you will hear from Pamela, Jennifer or me via email to let you know if there are questions or if your Profile has been published – FDP Admin review consists of such things as making sure that:
 - Responses and information seems appropriate and fields all completed
 - All links work and go to the appropriate place based on question being asked – it’s not ok to just link to general research admin web page and let people search around to find the right thing! (Note: when opening links, be sure and check for a download that you might need to open)
 - Comments in comments box are clear and appropriate for public (not feedback about system, for instance)
 - Legal Entity Name and DUNS number match the SAM record
 - If Audit attached is for a broader entity, is the Primary Audit Entity information provided

- Within a week after your profile is published, you will also notice that the link to your profile will change in the Excel version of the FDP Clearinghouse and users clicking on your link in that system will be directed to your On-Line profile instead. This is a function that the Expanded Clearinghouse Co-Chairs and David Wright are managing automatically, so you do not need to do anything.

We are updating these in batches, however, so please be patient if it takes a few days for the link to be updated. We are doing this to eliminate the need for you to concurrently maintain both your Excel Profile and your online Profile. Once all of Cohort 1&2 has published profiles, the Excel version of the Clearinghouse will be retired and users will only see the online version.

Bug Fixes and minor other fixes

- As issues are discovered our awesome developers Chris and Michael are fixing and you might see slight formatting or wording changes here and there. At this point as we are cleaning things up, we aren't going to let you all know about each of these. If you are involved in having discovered the issue, we will inform you though!

Email Notifications from the System

- You will receive system generated emails for the following actions currently in the system:
 - Account creation
 - Password reset
 - To Profiler Certifier when Profile is submitted for certification from Editor
 - To Profile Certifier when Profile is retracted from submission to Certifier by Editor
- All Email Notifications from the System will be from fdpechelp@gmail.com.

System “Users”, “Contacts” and Pilot Listserv members

- Please read the instructions about the difference between Users and Contacts - https://fdpclearinghouse.org/helpdocs/instructions.html#_Toc480530343
- When a User is created and given the “Profile Certifier” permissions, they will automatically appear as the Primary Authorized Signing Official in the Contacts. There can only be one Profile Certifier
- We track Pilot Listserv members separately via this listing - http://sites.nationalacademies.org/cs/groups/pgasite/documents/webpage/pga_173410.pdf
 - The listserv is not currently populated from system Users and Contacts
 - If you need to update a system User or Contact – you do this in the system
 - If you need to update a Pilot Listserv member, please send an email to fdpechelp@gmail.com

Help Desk

- Please send all comments, questions, feedback and praise to fdpechelp@gmail.com
- Multiple people are monitoring this email and one of us will respond fairly quickly – generally within a couple hours – but many times within minutes!
- We will also be hosting an in person Help Desk next week at the FDP meeting at the Hyatt Lobby bar, 5/10 and 5/11 from approximately 8:30 -10:00 pm. Bring all your questions and your login information and come hang out with us and get your questions answered and maybe your Profile created, entered, submitted and published all at the same time!

Thanks everyone!

Lynette, Jennifer and Pamela (co-chairs)

And the FDP Expanded Clearinghouse Working Group and System Development Group

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