

Using



for

Program Monitoring

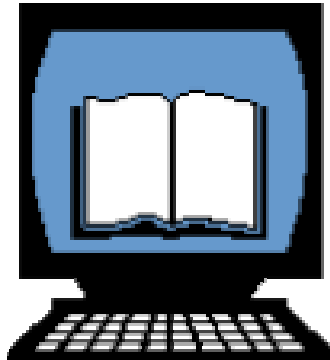
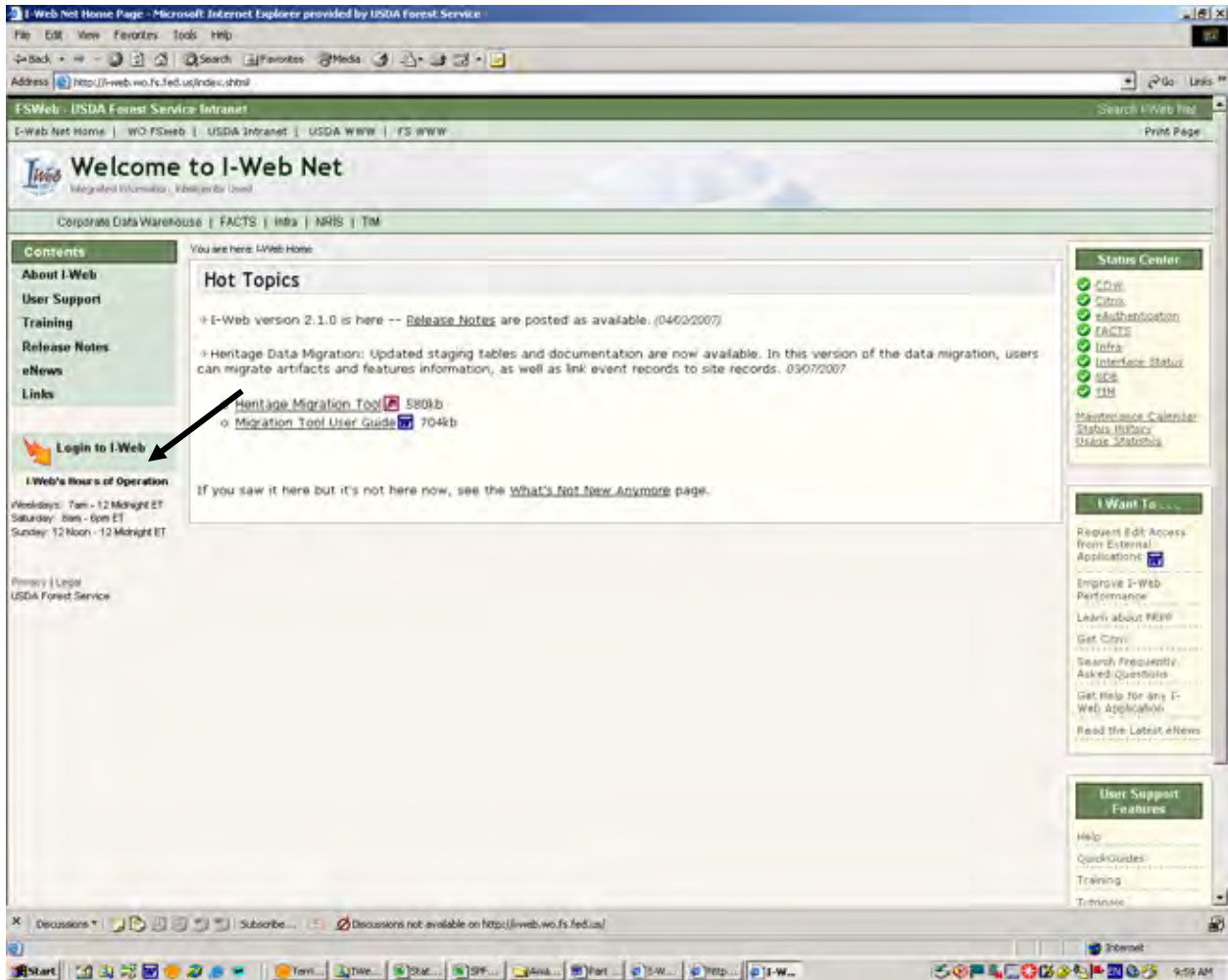


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IWEB HOME PAGE



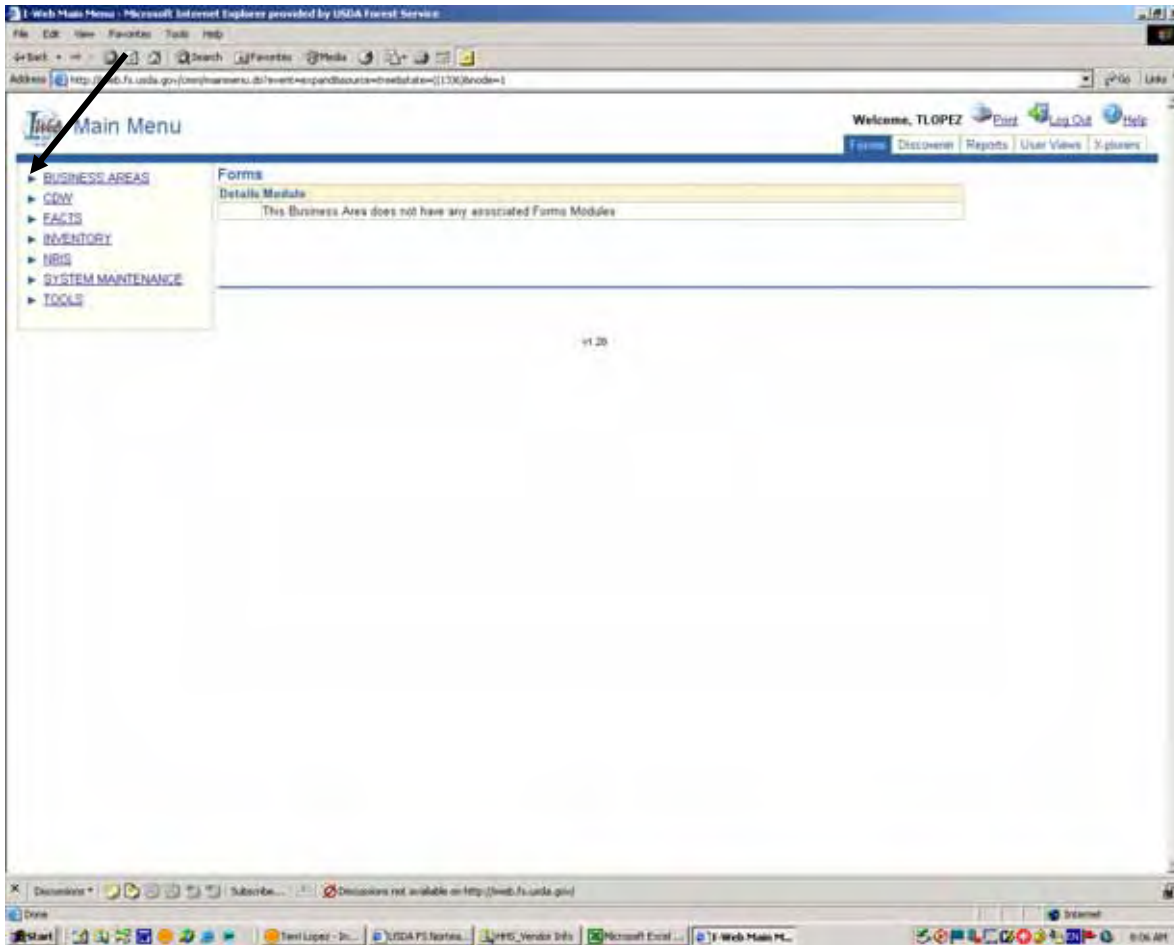
i-web.wo.fs.fed.us

Click on “Login to IWeb”.

Next screen, click on “Login for Full Access”.

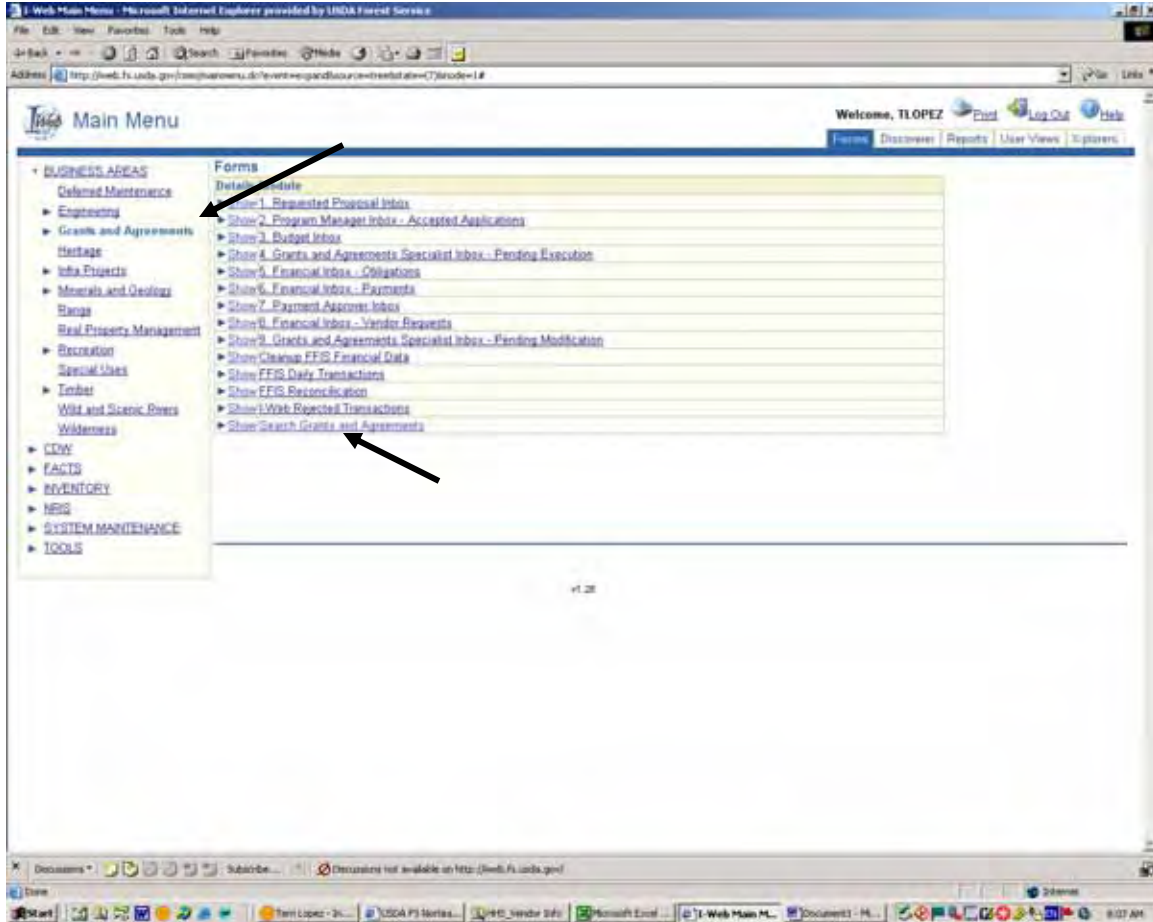
Continue to follow screen prompts for E-Authentication login and password.

LOGIN SCREEN



Click on the triangle beside Business Areas to reduce the number of options to select.

IWeb is an umbrella for many other programs other than Grants and Agreements.



Click on Grants and Agreements.

The specific options for this program will appear.

IWeb is internet based however you will need VPN access in order to use IWeb from home or on travel.

SEARCH SCREEN

Search GA - Microsoft Internet Explorer provided by USDA Forest Service

File Edit View Favorites Tools Help

Address http://webd.fs.usda.gov/ty/tyweb/SearchGA.do;jsessionid=211cc075afae463eb77e9117907ae474...a3481e0c94ade4094c39f6a3c3a3a6d27a4597710b06a17e

Grants & Agreements Welcome, TLOPEZ

Reset Search Criteria Search Grants and Agreements

Proposal ID

Org

Min App Received Date 12

Min Status Date 12

Min Expiration Date 12

Master Agreement Number

Agreement No

Project Title

Job Code

CFDA No

Agreement Status

Max App Received Date 12

Max Status Date 12

Max Expiration Date 12

Applicant Name

Contact/Cooperator Name

Obligation Doc ID

FY Instl Type Agency Region Unit SubUnit Sequence

Search

Select Proposal ID Agreement No Project Title CFDA Org Received Date Status Status Date Exp Date Applicant Name

No Records Found

Back | Help

- This is the most used screen.
- The wildcard is % sign.
- When typing in IWeb, use all capitals.
- Click on “Reset Search Criteria” to clear the screen of previous entries.
- Many options on how to search for projects.

Examples of ways to search:

To find a grant when you know the number, fill in the following:

FY (4 digits)

Sequence (last three digits of the grant number)

To find open grants within a specific fiscal year, fill in the following:

FY (4 digits)

In Agreement Status select GA-EXECUTED

SEARCH SCREEN, CONTINUED

To find open grants for a specific recipient:

In Agreement Status select GA-EXECUTED.

In Applicant Name type the name of the recipient surrounded by % sign
(e.g., %MICHIGAN STATE UNIVERSITY%)

To find open grants within a specific fiscal year for one individual, fill in the following:

FY (4 digits)

In Agreement Status select GA-EXECUTED

In Contact/Cooperator Name type in the person's last name surrounded by the wild card
(%)

To find a new grant that's in the proposal stage, fill in the following:

Proposal ID.

The Proposal ID is a 16 digit number. You can do an abbreviated search for this number by using the wildcard and the last five digits of the ID number (e.g., %42460)

To find grants related to Emerald Ash Borer, fill in the following:

Project Title with the wildcard surrounding the words (e.g., %EMERALD ASH BORER")

This option is limited to how the title was originally typed into the system. In this case, Emerald Ash Borer may have been typed as "EAB".

MONITORING TAB

The screenshot displays the 'Monitoring' tab in a web application. At the top, there is a navigation bar with 'Grants & Agreements' and a user welcome message 'Welcome, TLOPEZ'. Below this, there are several buttons: 'Copy Agreement', 'Post Agreement', 'Terminate Agreement', and 'Closeout Agreement'. The main content area is divided into sections. The 'Information' section contains various input fields for 'FY', 'Type', 'Agency', 'Region Unit', 'Sub Unit Seq', 'Mod No', 'Start Date', 'Expiration Date', 'IDIS Paid', and 'Status'. The 'Monitoring' section features a table with columns: 'Select and Delete', 'Create', 'Performance No.', 'Performance Start Date', 'Performance End Date', 'Report Source', 'Report Due Date', and 'Report Received Date'. The table contains five rows of data. Below the table is a 'Comments' text area. At the bottom, there are more navigation buttons: 'Previous Set', 'Modifications', 'Monitoring', 'Authorities', 'FAAD', 'OPRA', 'Exit Funding', and 'Status'. Two black arrows point to the 'Performance Start Date' field in the first row of the table and the 'Comments' text area.

Select and Delete	Create	Performance No.	Performance Start Date	Performance End Date	Report Source	Report Due Date	Report Received Date
<input type="checkbox"/>	<input type="checkbox"/>	5	04/05/2007	04/05/2007	L BURBAN	04/05/2007	
<input type="checkbox"/>	<input type="checkbox"/>	4	02/13/2007	02/13/2007	L BURBAN	02/13/2007	
<input type="checkbox"/>	<input type="checkbox"/>	3	10/01/2006	09/30/2006	BTG	12/31/2006	
<input type="checkbox"/>	<input type="checkbox"/>	1	06/26/2006	06/26/2006	L BURBAN	06/26/2006	
<input type="checkbox"/>	<input type="checkbox"/>	2	11/07/2006	11/07/2006	L BURBAN	11/07/2006	

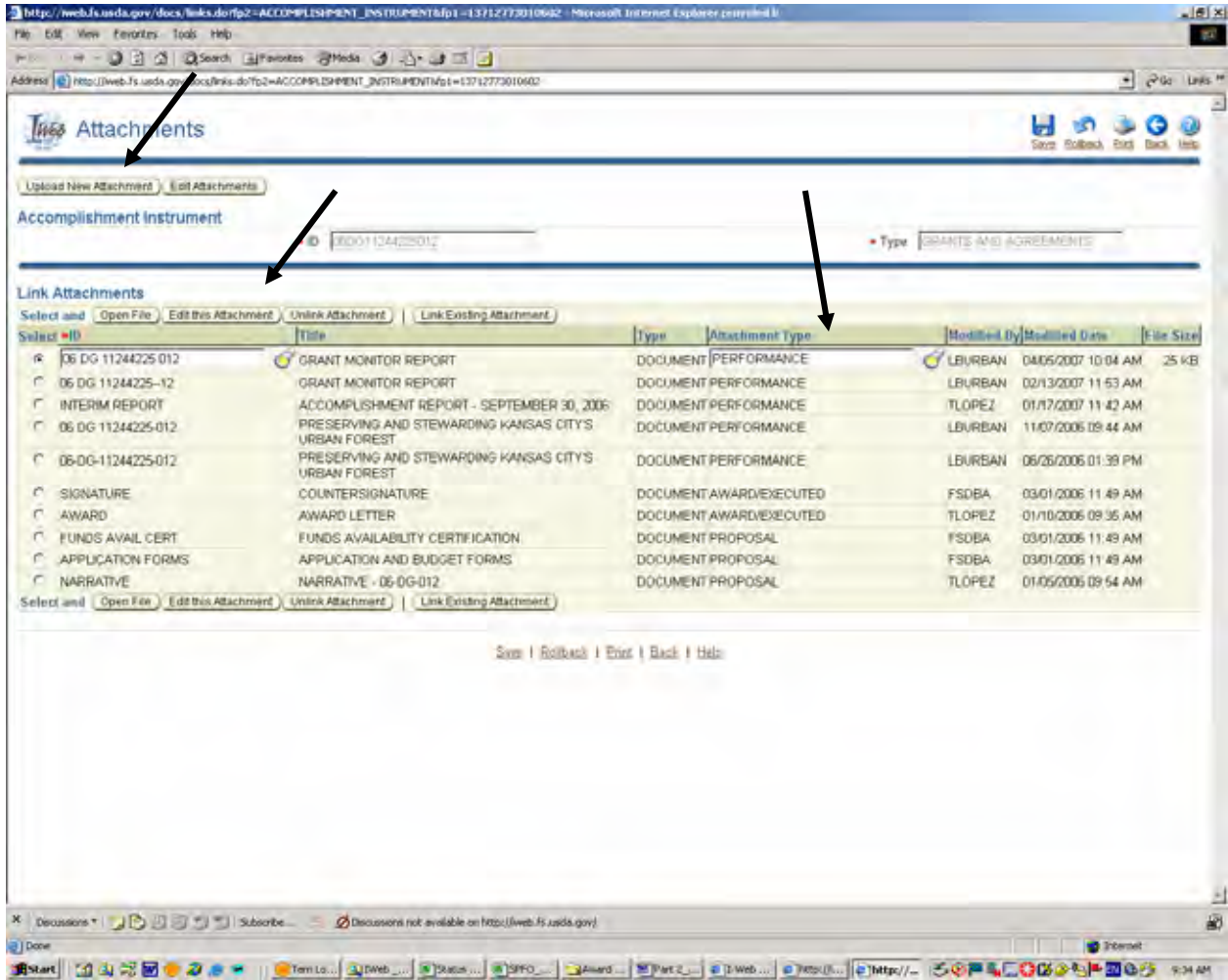
- This tab is used to document all types of monitoring:
 - Attaching reports received from recipients.
 - Attaching monitoring reports prepared by FS program staff.
 - Document a phone call by typing directly into the comments box.
 - Can cut and paste a Word document or email correspondence into the Comments block (to paste into the Comments box, right click in the box and select the paste option. Do not use any of the options at the top of the screen.)
- All blocks with a red asterisk must be completed.
- Don't get hung up too much on the dates when entering monitoring information.
 - The date fields are mainly needed for the required reports submitted by recipients which have specific time frames for submission.

MONITORING TAB, CONTINUED

- Hard copies of monitoring reports no longer have to be sent to NTS if they are attached in IWeb. **However, all required reports from recipients that are due based on the terms and conditions of the award letter must be sent to the Grants Specialist for incorporation into the grant file.**

VERY IMPORTANT: You must complete an entry in the Monitoring Tab when attaching documents in IWeb. IWeb reports are being developed which will generate monitoring information from this tab.

ATTACHMENT SCREEN



VERY IMPORTANT: Every time you attach a file in IWeb, document it on the Monitoring Tab.

All monitoring reports should reflect the Attachment Type as “Performance”.

You can upload any type of document to support your project (i.e., Word file, Excel spreadsheet, pictures, PDF file, etc.)

Various functions:

- To begin uploading a file, click “Upload New Attachment”.
- To open an exiting file, click on the radio button for the file you want to view and click “Open File”.
- To delete a file, click on the radio button for the file you want and click “Unlink Attachment”.
- To change a title for your attachment or upload a different file, click “Edit this Attachment”.

- Once a file is opened you can print it or save it to another location.

Eventually, the attachment section will become rather large. You can sort the information by clicking on one of the green title boxes.

- For example, if you want all the performance reports sorted together, click on Attachment Type and the order of the attachments will be in ascending order.
- If you click on Attachment Type again, the order will change to descending order.

Refer to the attached Quick Guide for more information concerning Attachments.

SAMPLE GRANT FILE WITH GRAPHICS ATTACHED – 05-DG-328

The screenshot shows a web browser window displaying the 'Attachments' page for an 'Accomplishment Instrument' with ID 05-DG-328. The page title is 'IWeb Attachments'. Below the title, there are buttons for 'Upload New Attachment' and 'Edit Attachments'. The instrument ID is shown as 05-DG-328 and the type is 'GRANTS AND AGREEMENTS'. A table titled 'Link Attachments' is displayed with columns: Select, Title, Type, Attachment Type, Modified By, Modified Date, and File Size. An arrow points to the 'Attachment Type' column header. The table contains several rows of attachments, including graphics and performance reports.

Select	Title	Type	Attachment Type	Modified By	Modified Date	File Size
<input checked="" type="checkbox"/>	FIFIELD-PINE LAKE REVISION	IMAGE	EXHIBIT	TLOPEZ	04/17/2007 09:08 AM	823 KB
<input type="checkbox"/>	PINE LAKE WELCOME SIGN	IMAGE	EXHIBIT	TLOPEZ	04/17/2007 09:09 AM	421 KB
<input type="checkbox"/>	FIFIELD WELCOME SIGN	IMAGE	EXHIBIT	TLOPEZ	04/17/2007 09:06 AM	510 KB
<input type="checkbox"/>	MUSEUM SIGN	IMAGE	EXHIBIT	TLOPEZ	04/17/2007 09:04 AM	1292 KB
<input type="checkbox"/>	BROCHURES	IMAGE	EXHIBIT	TLOPEZ	04/17/2007 09:03 AM	1014 KB
<input type="checkbox"/>	ACCOMPLISHMENT REPORT	DOCUMENT	PERFORMANCE	TLOPEZ	04/09/2007 07:55 AM	114 KB
<input type="checkbox"/>	ON-LINE AUTHORIZATION	DOCUMENT	CLOSEOUT	TVOSS	03/20/2007 10:49 AM	
<input type="checkbox"/>	ACCOMPLISHMENT REPORT - SEPTEMBER 2006	DOCUMENT	PERFORMANCE	TLOPEZ	11/15/2006 08:38 AM	

PAYMENTS TAB

The screenshot shows the 'Grants & Agreements' web application. The 'Payments' tab is selected. The 'Fund Summary' section contains the following table:

Line No	Budget Org Code	Job Code	Budget FY	Source Name	Total Other Value	Total Obligation	Total Collection	Payments To Date	Pending Payment	Undelivered Obligation
1	2442	SPUF4206	2006 FS	FOREST SERVICE	\$0.00	\$79,000.00	\$0.00	\$49,375.00	\$0.00	\$29,625.00

Below the table, the 'Pending Payments' section shows 'No Records Found'.

Fund Summary section shows:

- The amount of matching funds for the project
 - Source Block = NF (non-federal)
 - Name = Name of Recipient
- The amount of federal funds for the project (Source Block = FS)
 - Amount Awarded (Total Obligation)
 - Amount Expended (Payments to Date)
 - Balance Remaining (Undelivered Obligation)

There may be more than one line of matching and/or federal funds listed, depending on how the grant was awarded (for example, multiple lines for a consolidated grant) or if there's been an increase in funding in a subsequent fiscal year.

PAYMENTS TAB – PAID INVOICES

The screenshot displays the 'Grants & Agreements' web application. At the top, there are search and filter options for Agency, Region, Unit, Subunit, and Seq. Below this is a 'Fund Summary' table:

Line No	Budget Org Code	Unit Code	Budget FY	Source Name	Total Other Value	Total Obligation	Total Collection	Payments To Date	Unlevered Obligation
1	2442	SPUF4206	2006 FS	FOREST SERVICE	\$0.00	\$79,000.00	\$0.00	\$49,375.00	\$25,625.00

Below the fund summary is the 'Paid Invoices' section, which contains a table of payment requests:

Req Select	Req No	Inv No	Invoice Date	Payment Method	Date Received	Performance Start Date	Performance End Date	Payer	Recipient	Invoice Total	Comments	Payment Status	Status Line
<input checked="" type="checkbox"/>	3	NO INVOICE	01/22/2007	HHS DISBURSEMENT	01/23/2007	01/23/2007	01/23/2007	BTO	138258010602	\$9,875.01	AUTO GENERATED - Decreases obligation for NO document. 02469059204	FFIS-PROCESSED	01/23/2007
<input type="checkbox"/>	2	NO INVOICE	10/20/2006	HHS DISBURSEMENT	10/20/2006	10/20/2006	10/20/2006	BTO	138258010602	\$13,166.68	AUTO GENERATED - Decreases obligation for NO document. 02469059203	FFIS-PROCESSED	10/20/2006
<input type="checkbox"/>	1	NO INVOICE	07/23/2006	HHS DISBURSEMENT	07/23/2006	07/23/2006	07/23/2006	BTO	138258010602	\$9,875.01	AUTO GENERATED - Decreases obligation for NO document. 02469059202	FFIS-PROCESSED	07/24/2006
<input type="checkbox"/>	0	NO INVOICE	04/06/2006	HHS DISBURSEMENT	04/07/2006	04/06/2006	04/06/2006	BTO	138258010602	\$16,458.30	AUTO GENERATED - Decreases obligation for NO document. 02469059201	FFIS-PROCESSED	04/07/2006

Click on the Paid Invoices Tab to see a listing of each drawdown taken for your project.

From this tab you will know if a recipient is drawing funds on a regular basis.

MODIFICATIONS TAB

The screenshot shows the IWeb Grants & Agreements interface. At the top, there's a navigation bar with 'Welcome, TLOPEZ' and various utility icons. Below this, a summary section shows 'Mod No.' 002, 'Start Date' 07/01/2006, and 'Expiration Date' 06/30/2007. The 'Modifications' section contains a table with the following data:

Select	Mod No	Mod Date	Mailed Date	FY	Description of Mod	Field to be Modified	Old Value	New Value	Mod Status	Status Date
<input checked="" type="checkbox"/>	002	07/21/2006		2006	INCREASE FUNDS	AMOUNT		42574	EXECUTED	07/24/2006
<input type="checkbox"/>	001	05/22/2006		2006	TIME EXTENSION	EXPIRATION DATE	6/30/2006	6/30/2007	EXECUTED	
<input type="checkbox"/>	001	05/22/2006		2006	INCREASE FUNDS	AMOUNT		125412	EXECUTED	

The information on this tab will document actions taken to modify a grant.

Note that the Mod No. at the top of the screen says 002, therefore, two modifications have been processed for this project.

All associated documents for a modification (award letter, countersignature, revised narratives, etc.) are uploaded into IWeb (starting in FY06) and will be available for field staff to review as needed.

NOTE:

You may receive notification from IWeb when a grant is modified. This is a recent enhancement that has been made to the system where the program manager is notified that a change was made to a project. No action is required on your end if you see this type of email.

OBLIGATIONS TAB

http://web.fs.usda.gov/ga/obligations.do - Microsoft Internet Explorer provided by USDA Forest Service

Address: http://web.fs.usda.gov/ga/obligations.do

Welcome, TLOPEZ

Copy Agreement | Print Agreement

Med No: 001

Start Date: 04/13/2004

Expiration Date: 02/01/2006

Status: GA-CLOSED

Project Title: RURAL FIRE PROTECTION- DRY I

Summary | Details | Notes | Contacts | Cooperators | Commitments | Other Contributions | **Obligations** | Payments | Expenditure Refunds | Next Set >>>

Fund Summary

Line No	Budget Org Code	Job Code	Budget FY	Source	Name	Total Other Value	Total Obligation	Total Collection	Payments To Date	Pending Payment	Unobligated Obligation
			2004	NF	GA DATA CONVERSION COOPERATOR	\$60,000.00	\$60,000.00	\$0.00	\$0.00	\$0.00	\$0.00
1	2442	S2Z29004	2004	FS	FOREST SERVICE	\$0.00	\$18,763.95	\$0.00	\$18,763.95	\$0.00	\$0.00

FS Obligation Transactions

Select	Line No	Line No	Mod No	Fiscal Year	BDC	Job Code	Budget FY	Budget Org Code	Program Code	Payee	Amount	Comments	Obligation Status	Status Date	FFIS Doc ID
R	001	000	000	2004	4110	S2Z29004	2004	2442	SPS2	HHS	\$60,000.00	CONVERSION GENERATED obligations from FFIS	FFIS-PROCESSED	06/19/2006	24420425290
C	001	001	000	2004	4110	S2Z29004	2004	2442	SPS2	HHS	(\$18,236.45)	BASED ON FINAL SF-269	FFIS-PROCESSED	04/05/2007	24420425290
Total															

Summary | Details | Notes | Contacts | Cooperators | Commitments | Other Contributions | **Obligations** | Payments | Expenditure Refunds | Next Set >>> | Save | Export | Print | Link | Back | Attach | Find | Rollback

Copy Agreement | Print Agreement

The Obligations Tab reflects the amount of funds obligated for a project. But, you will also find on this tab any deobligations that have taken place for a project.

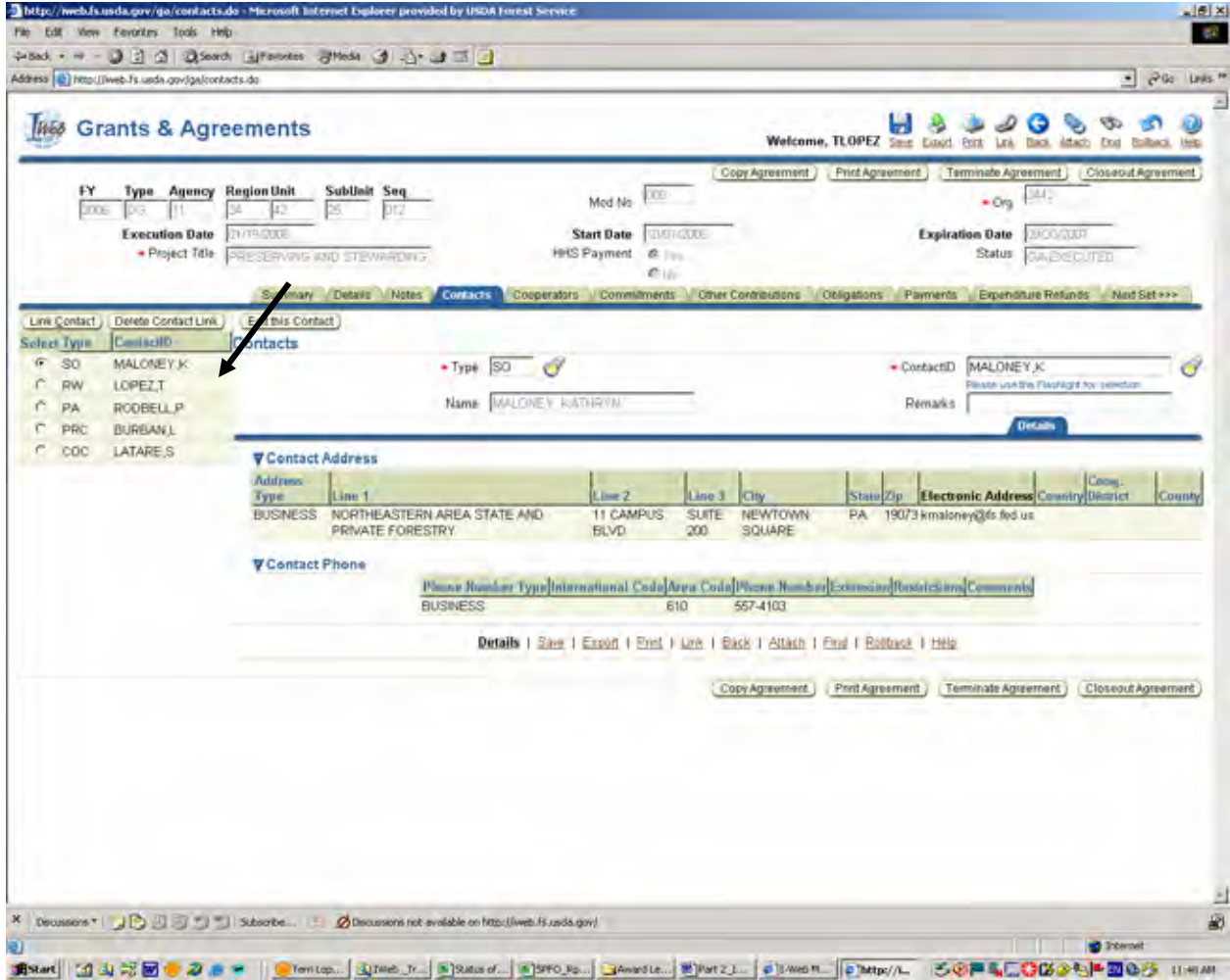
In the FS Obligation Summary section the first line is the total amount obligated for the project (\$60,000) and the second line reflect the amount deobligated. In this case, the decrease in funds is based on the final Financial Status Report submitted by the recipient.

Note:

The federal funds listed in the Fund Summary section reflect the amount expended for the project, not the amount awarded.

The Status block in the upper right hand corner reflects “GA-Closed”.

CONTACTS TAB



Ensure that your name appears in the Contacts Tab if you are responsible for a project.

This will also assist you in using the Search screen to find all the grants that you are responsible for.

NOTES TAB

The screenshot displays the 'Grants & Agreements' web application interface. The 'Notes' tab is active, showing a form for adding a note. A dropdown menu is open, listing note types: AGREEMENT, COMMITMENT, OBLIGATION, PAYMENT, MODIFICATION, and OTHER. An arrow points to the 'AGREEMENT' option. The form includes fields for User ID, Date, Type, Comments, Email To, and Email Date. The top of the page shows project details: FY (2006), Type (DC), Agency (11), Region (04), Unit (42), Subunit (25), and Seq (012). Other fields include Execution Date (01/19/2006), Start Date (10/01/2005), Expiration Date (08/30/2007), and Status (GA-EXECUTED). The browser window title is 'http://web.fs.usda.gov/ga/notes.do - Microsoft Internet Explorer provided by USDA Forest Service'.

This tab is used to document administrative-type actions for a project. Do not use this tab for monitoring a project.

Can use this tab to send emails if you need another individual to review/document actions for a project.

NOTES TAB, CONTINUED

[Copy Agreement](#) | [Print Agreement](#) | [Terminates Agreement](#) | [Closeout Agreement](#)

Mod No: 1000 Org: 0442
 Start Date: 10/01/2006 Expiration Date: 09/30/2007
 HHS Payment: Yes Status: SA-EXECUTED
 No

[Summary](#) | [Details](#) | **[Notes](#)** | [Contacts](#) | [Cooperators](#) | [Commitments](#) | [Other Contributions](#) | [Obligations](#) | [Payments](#) | [Expenditure Refunds](#) | [Next Set >>>](#)

Notes
[Select and Delete](#) | [Send Email](#) | [Create](#)

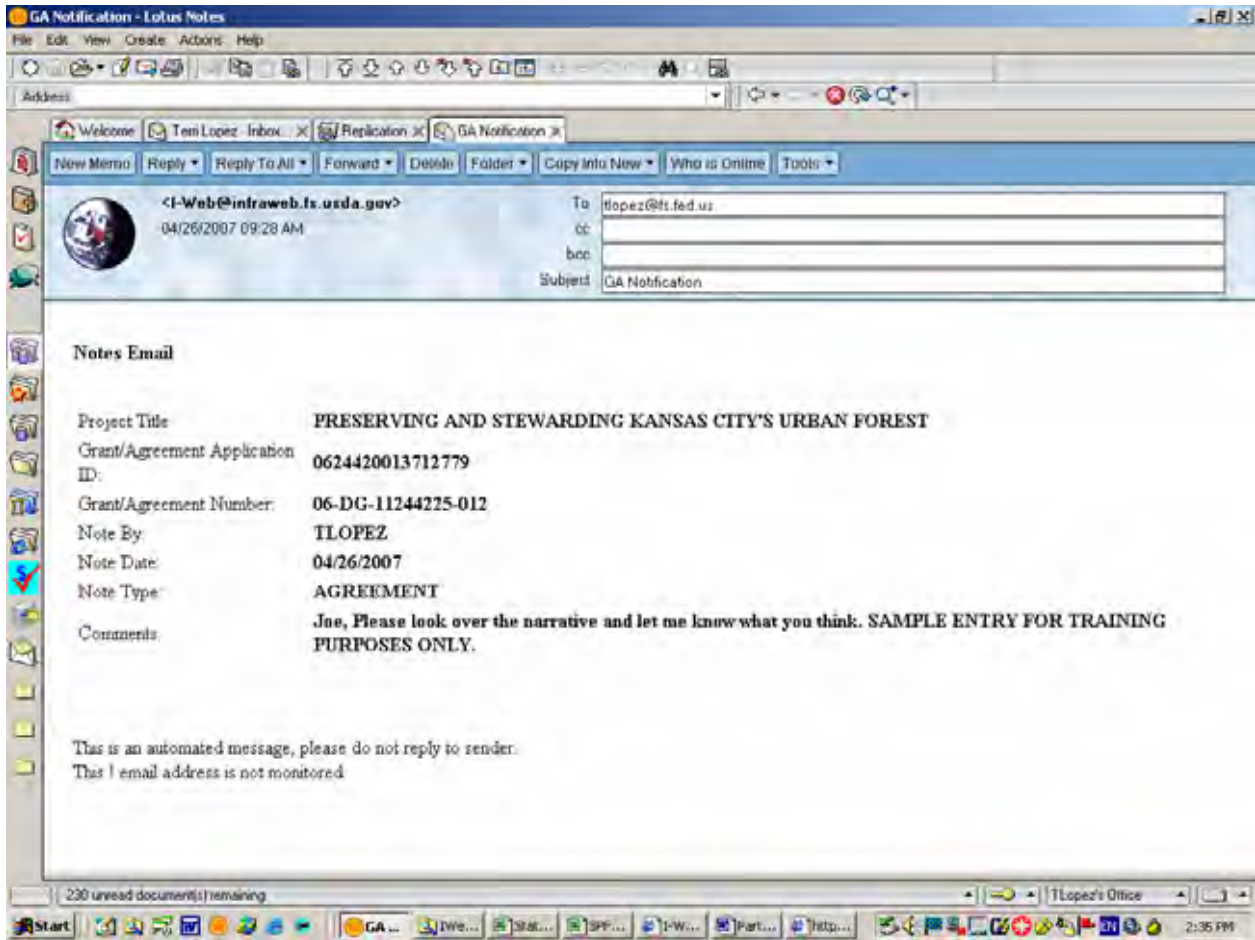
Select	User ID	Date	Type	Comments	Email To	Email Date
<input checked="" type="checkbox"/>	TLOPEZ	04/26/2007	AGREEMENT	Joe, Please look over the narrative and let me know what you think. SAMPLE ENTRY FOR TRAINING PURPOSES ONLY.	tlopez@fs.fed.us	04/26/2007

[Summary](#) | [Details](#) | **[Notes](#)** | [Contacts](#) | [Cooperators](#) | [Commitments](#) | [Other Contributions](#) | [Obligations](#) | [Payments](#) | [Expenditure Refunds](#) | [Next Set >>>](#) | [Save](#) | [Export](#) | [Print](#)

[Copy Agreement](#) | [Print Agreement](#) | [Terminate Agreement](#) | [Closeout Agreement](#)

Example of an e-mail entry.

SAMPLE E-MAIL GENERATED FROM NOTES TAB



STATUS TAB

The screenshot shows the 'Grants & Agreements' web application. At the top, it says 'Welcome, TLOPEZ'. Below this are several buttons: 'Copy Agreement', 'Print Agreement', 'Terminate Agreement', and 'Closeout Agreement'. The main content area is divided into two sections: a summary form and a 'Status History' table.

Summary Form:

- FY:** 2006
- Type:** 00
- Agency:** 11
- Region:** 04
- Unit:** 42
- SubUnit:** 05
- Seq:** 012
- Mod No:** 000
- Org:** 0442
- Execution Date:** 01/19/2006
- Start Date:** 10/01/2005
- Expiration Date:** 09/30/2007
- Project Title:** PRESERVING AND STEWARDING
- HMS Payment:** Yes (selected)
- Status:** GA-EXECUTED

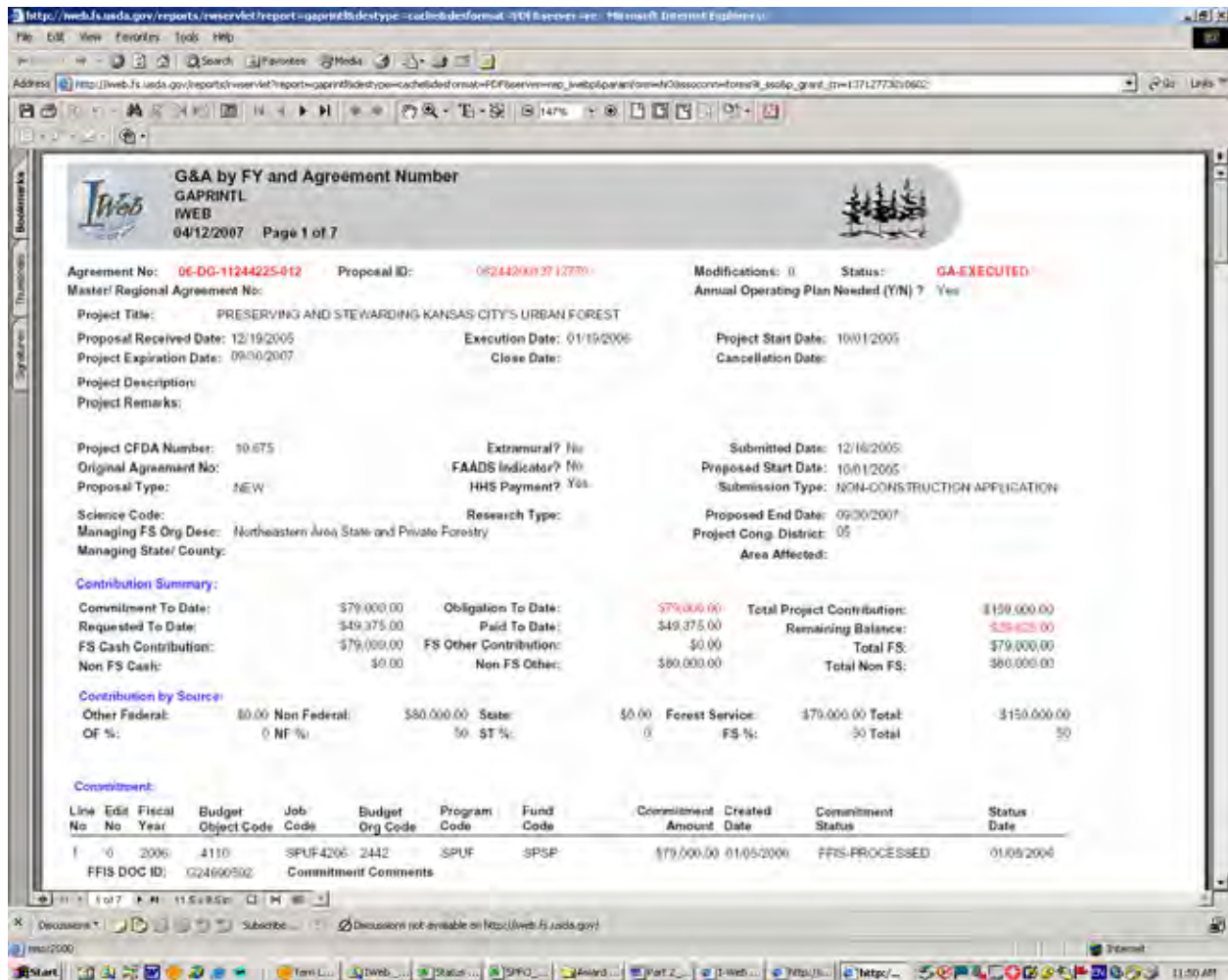
Status History Table:

Type	Id	Status Code	Status Date	Created By	Comments
PROPOSAL	06DG11244225012	APP-ACCEPTED	01/05/2006	TLOPEZ	
PROPOSAL	06DG11244225012	APP-APPROVED	01/05/2006	TLOPEZ	
COMMITMENT 1.0		BUDGET-PENDING APPROVAL	01/05/2006	PRODBELL	
COMMITMENT 1.0		BUDGET-APPROVED	01/05/2006	TGROSS	
COMMITMENT 1.0		FFIS-SENT	01/05/2006	FSDBA	
COMMITMENT 1.0		FFIS-PROCESSED	01/08/2006	FSDBA	
AGREEMENT	06DG11244225012	GA-PENDING	01/09/2006	FSDBA	
AGREEMENT	06DG11244225012	GA-EXECUTED	01/26/2006	TLOPEZ	
OBLIGATION 1.0		FINANCIAL-PENDING APPROVAL	01/26/2006	TLOPEZ	
OBLIGATION 1.0		FFIS-PROCESSED	02/02/2006	FSDBA	

This tab gives a history of all executable actions taken for a project.

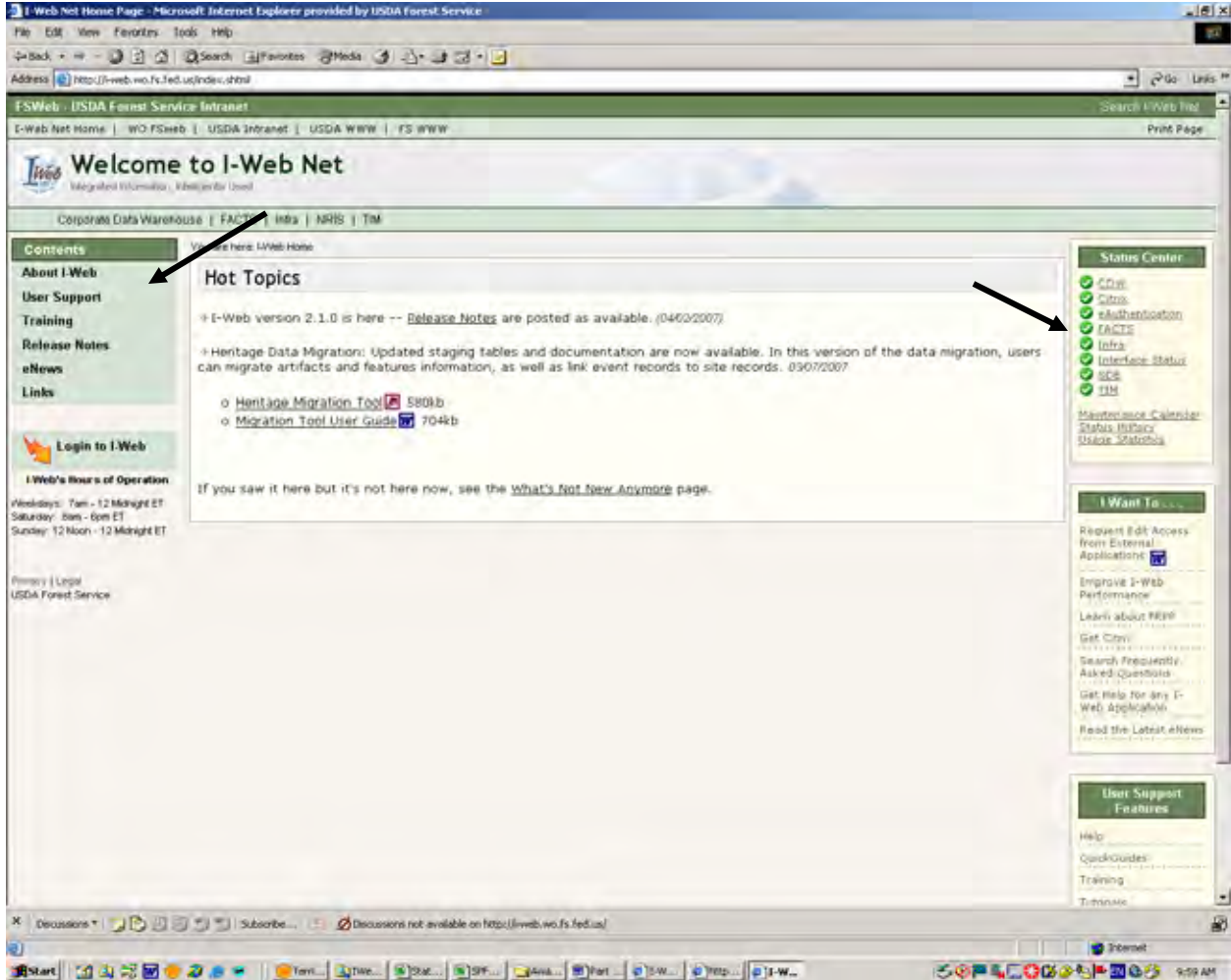
“FSDBA” is actions taken at the Albuquerque Service Center.

PRINT AGREEMENT BUTTON



The Print Agreement button in the upper right hand corner of the screen will produce, in one document, everything that is on each tab.

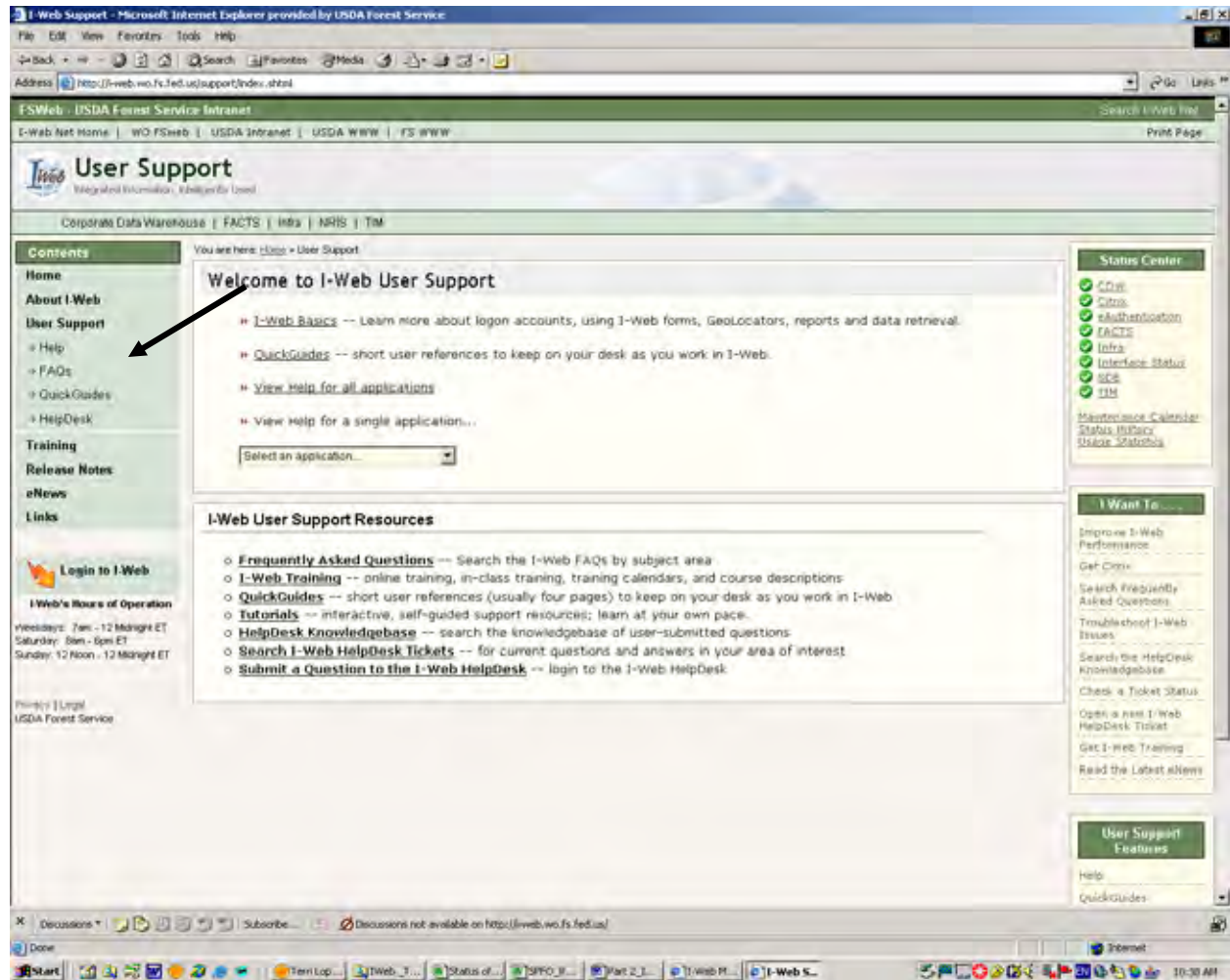
IWEB HOME PAGE



Become familiar with all that's available on the IWeb home page.

The Status Center will show if the system is down. Look under the "Infra" listing for the status of the Grants and Agreements portion of IWeb.

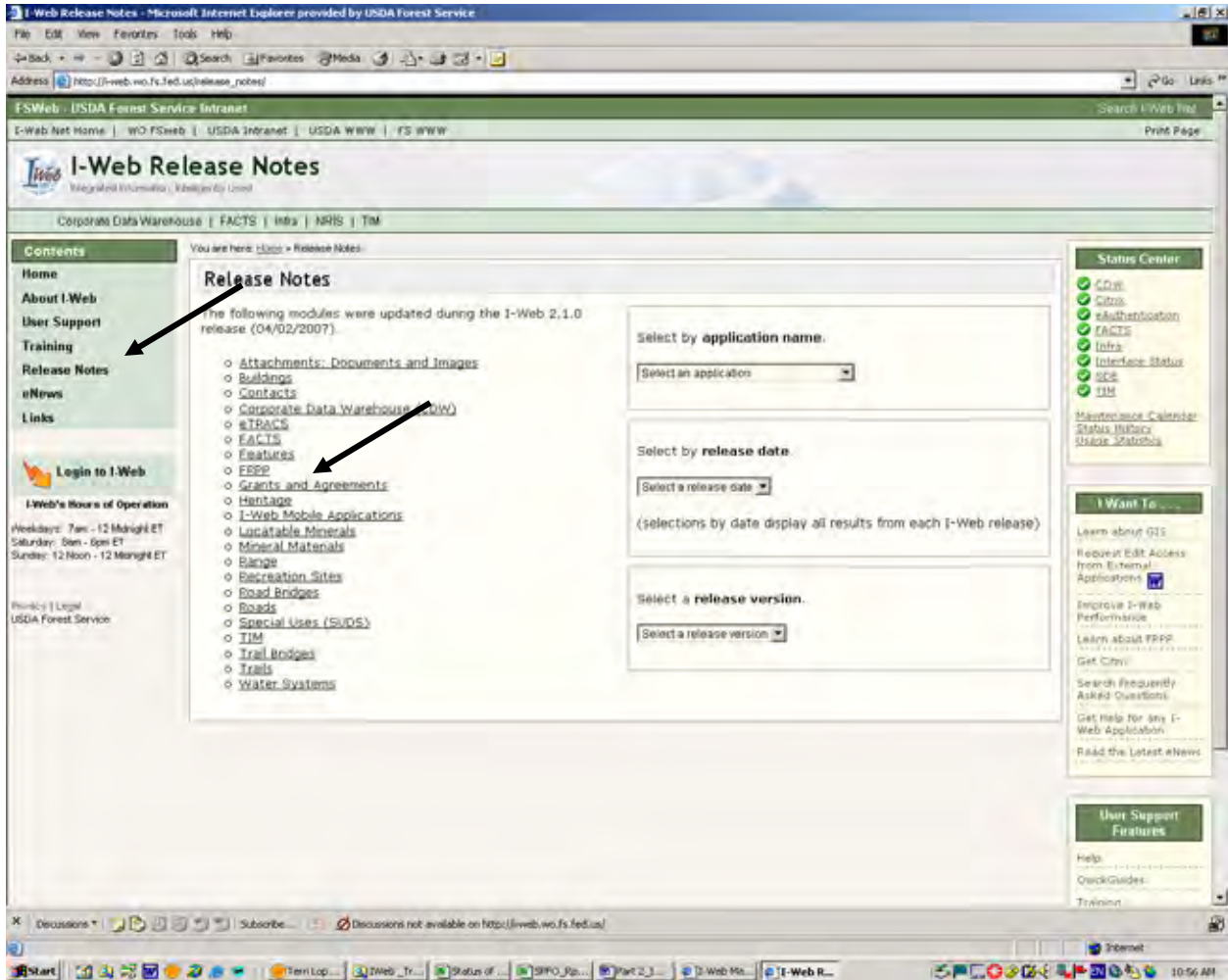
USER SUPPORT SCREEN



On the User Support Screen, you can access:

- Quick Guides that are available for specific topics.
- A comprehensive Help Manual.
- The Helpdesk to submit a ticket if you are having a problem or would like to make a suggestion for improvement.

RELEASE NOTES



The Release Notes will give you an overview of all the enhancements that have been made to the system.

ATTACHMENT I

Quick Guide for Attaching Documents

Click on the following link for the Quick Guide

<http://i-web.wo.fs.fed.us/support/quickguides/index.shtml>

ATTACHMENT II

Sample Printout of Project Information

**Click on the Print Agreement Button when logged into an grant
in IWeb.**