



# Grantee Training Manual

## Performance Progress Reports

Prepared by BearingPoint, Inc.

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## Document Conventions

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**Overview** Welcome to the Grants Online Training Manual. This manual is set up to provide you with step-by-step information to accomplish tasks within Grants Online. The manual is logically sequenced based on the National Oceanic and Atmospheric Administration's (NOAA) Grants lifecycle process and is written to address your role as a grantee within Grants Online.

**Using this Guide** The following conventions were used in creating this manual. The manual uses block label text in order to scan for the information desired.

<b>Text Conventions</b>	<b>Text; Example</b>	<b>What it means.</b>
	Text in Bold; Click <b>Done</b>	Indicates a command.
	Text in Italics; <i>CD450 Details</i> screen appears.	Indicates a screen.
	Text in Bold Italics; <b><i>Name</i></b>	Indicates data to be entered into a field.
	Text in All Caps; LOGIN	Indicates a field name.

**Notes and Warnings** Notes and Warnings are used to indicate information or advisories when using Grants Online.



**Note:** A note is used to inform you about additional information during the procedure or process.



**Warning!** Business process may not work as desired or a procedure may produce an undesirable effect.

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## Grants Online Overview

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**Overview** The National Oceanic and Atmospheric Administration (NOAA) offers a variety of competitive and non-competitive grants and awards to various communities including States, Universities, and non-profit organizations. Prior to the advent of Grants Online, the processing of grants was a paper-based task involving time-consuming human interactions and program polices. The process of awarding grants to the most qualified applicant for a competitive Award, and to qualified designated applicants of non-competitive Awards, was also largely paper-driven.

As part of its strategy to move scientifically and operationally into the 21<sup>st</sup> century, Grants Online was developed. Grants Online is an E-Government initiative to create an automated tool that will support the grants management lifecycle activities. Grants Online significantly streamlines and unifies grants processing throughout all of NOAA, allowing the agency to increase efficiencies related to mission goals.

Grants Online is developed to answer several issues that occur during the award processing including:

- Reduce or eliminate paper forms for application.
- Provide an interface with Grants.gov to ensure applicants can apply for grants electronically.
- Reduce the processing time by incorporating workflows between Federal Program Officers (FPO), Grants Management Division (GMD), Financial Assistance Legal Division (FALD), and Grantees.
- Serve the NOAA community in its efforts to meet its mission goals more effectively.

Grants Online allows Grantees to:

- Accept Awards electronically.
- Manage user roles for individuals within their organization.
- Submit post-Award Action Requests, Performance Progress Reports, and Federal Financial Reports.

## Grants Online Software Description

### About Grants Online

Grants Online operates in a web environment, and can be accessed anywhere at anytime provided that you have Internet access. You will be required to use an Internet browser to log in and use Grants Online. Internet Explorer is the preferred browser for PC users; FireFox is the preferred browser for MAC users. No software is required for installation. Logins and passwords are required and will be relayed to you once you are established within the system



**Note:** You must have an Internet connection in order to access Grants Online.



**Warning:** Please do not use the browser "Back" button in Grants Online. Using the browser "Back" button will log you out of Grants Online.

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## Getting Started

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**Overview** When you are using any Windows-based software, navigation and ease of use are key components. Grants Online incorporates an intuitive Graphic User Interface (GUI) that assists end users in navigating and using the system appropriately. In Grants Online, all actions within the system can be made through mouse and keyboard. In this module, you will be shown the basics of Grants Online, including the look and feel of the system, navigation, and user customizations.

**Module Objectives** In this module you will accomplish the following objectives:

- Learn about how to obtain your Grants Online password
- Learn how to log into Grants Online

**Overview** Grants Online is accessible through your web browser, specifically Internet Explorer.

### Accessing Grants Online

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1. Click on the Internet Explorer Icon on your desktop to open the Internet Explorer browser.
2. Enter the following URL information in your address bar of your browser:  
<http://www.grantsonline.rdc.noaa.gov> then press **ENTER**
  - *Grants Online Login* page appears



## Logging in to Grants Online

1. If you haven't already, contact the Grants Online Help Desk to obtain your Username and Password.
  - Phone: 301-444-2112 or toll free at 1-877-662-2478
  - Email: grantsonline.helpdesk@noaa.gov
2. Enter your assigned **Username**.
3. Enter your assigned **Password**.
4. Click **Enter**.



### Warning!

If you enter an incorrect username or password, you will receive an error message in red on the screen. After three unsuccessful attempts to log in, the system will lock you out. In such cases, you are required to contact your System Administrator, Authorized Representative, or the Grants Online Help Desk to unlock your account

If nothing happens when you click enter, it means the server is down and will need to be restarted.

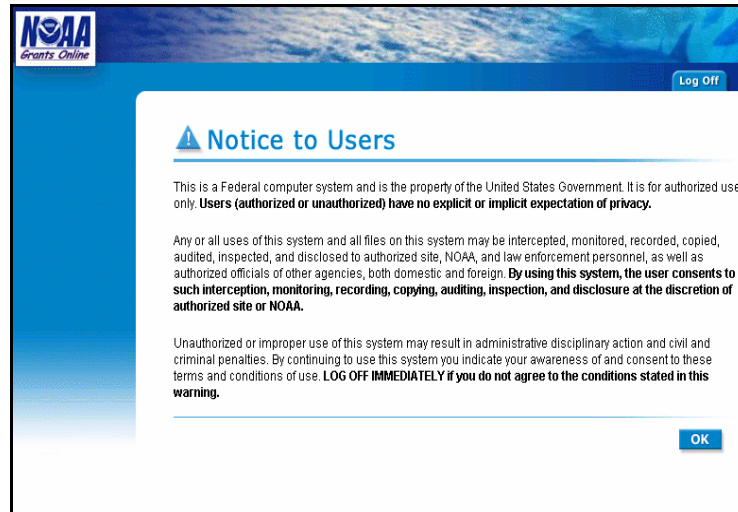


**Note:** If you click on the **Grants Online Training** link you can view and download training material including training manuals, quick reference guides, and online webinars.

## Logging in to Grants Online

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5. The *Notice to Users* screen appears.
6. Review disclaimer information and click **OK**.



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## Performance Progress Reports

**Overview** In this module, you will learn how to search, complete, and submit Performance Progress Reports in Grants Online.

**Module Objectives** The Performance Progress Reports module will review the following objectives:

- Processing Performance Progress Reports.
- Forwarding Performance Progress Reports to the agency as an Authorized Representative.

### Performance Progress Reports – Overview

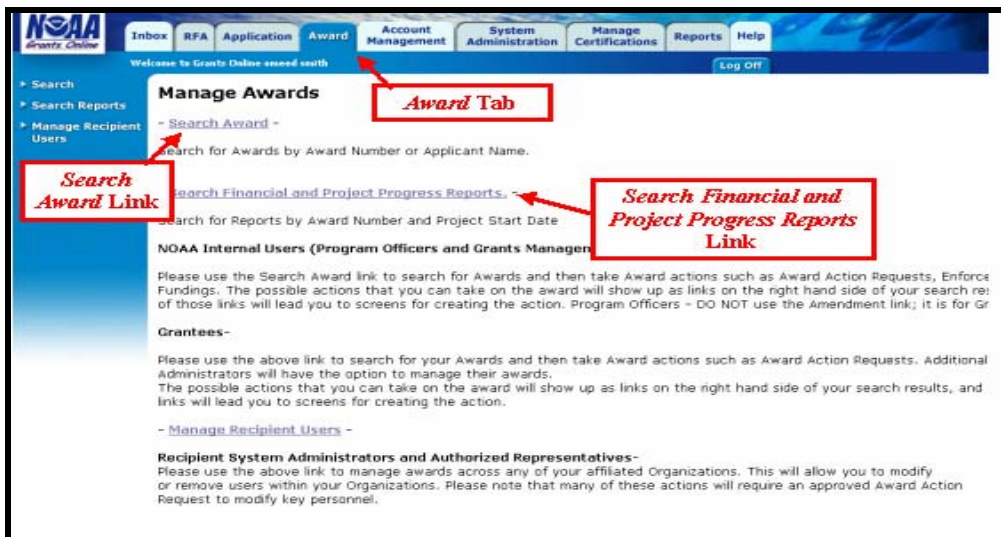
There are two versions of the Performance Progress Report: Simple and Expanded.

The **Simple Performance Progress Report** is an electronic means to enter some basic reporting information and attach the Performance Progress Report that grantees are currently submitting by paper or email. The advantage to submitting this report via Grants Online is that the report will initiate workflow actions for submission by the Recipient Authorized Representative and acceptance by the Federal Program Officer, with optional routing to other internal NOAA personnel for review. Additionally, the Grants Online data repository is becoming the Official Award File for all Award documents. By submitting the report via Grants Online, the recipient is credited the report submission without waiting or depending on others to enter the information.

The **Expanded Performance Progress Report** is based on a prototype Performance Progress Report currently under development by a Federal Review Board. It should not be used unless an agreement is in place with the Program Officer to use this report. At this time, nearly all grantees will use the Simple version of the Performance Progress Report.

### Searching and Viewing Performance Progress Report

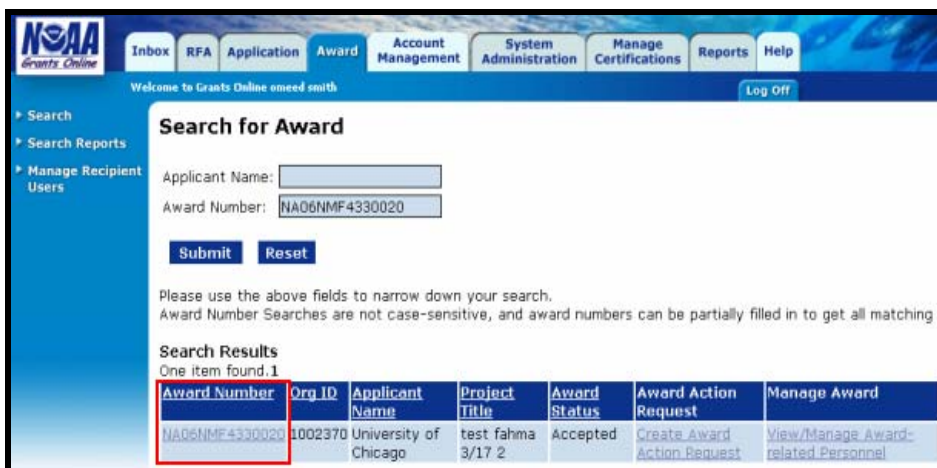
1. Select the **Award** tab and click the **Search Award** link to search for the AWARD NUMBER of the report you wish to complete.



2. After selecting the **Search Award** link click **Submit**. This will return all Awards for which you are designated as a Principal Investigator. If you are an Authorized Representative or Business/Financial Representative, all Awards for your organization will be displayed. Alternatively, you may narrow the search by entering the **Award Number** before clicking **Submit**.



3. The following screen displays the search results. To select the Award, click on the actual Award number link in the **Award Number** column.



- Once you have selected an Award, the following *Grants File* page is displayed. Please note the Grants file lists all of the Award files for the Award in the Sub Documents section. Award file 0 is the original Award and the subsequent Award files such as Award file 1 and Award file 2 represent either Amendments and/or Award Action Requests.

**Grants File - NA06NMF4330020**

ID: 2037090  
 Creator: System Account Create Date: 03/17/2006  
 Status: Grants File Approved Status Date: 03/17/2006  
 Last Edited User: System Account

This document currently has no tasks assigned to you.

---

**Grant Information**

CFDA Number:	11.423	Award Period:	04/01/2006 - 04/01/2007	Program Officer:	Fahima Zahr
Program Officer:	Fahima Zahr	Program Officer Phone:	122-123-1245	Program Officer Email:	fzahr@nsa.gov
Total Federal Funding:	\$100,000.00	Total Non-Federal Funding:	\$0.00	Multi-Year:	No
Organization Name:	University of Chicago	Electronic Recipient:	no		
Progress Report Frequency:	Semi-Annually	Financial Report Frequency:	n/a		
Project Title:	test fahima 3/17 2				

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**Sub Documents**

7 items found, displaying all items 1

Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date
Award Package	2037110	test fahima 3/17 2	System Account	03/17/2006	System Account	RecipientAuthorizedRepresentativeActions Complete AcceptAward	03/20/2006
Award File 0	2037090		System Account	03/17/2006	System Account	GrantsOfficerActions Complete ApproveAwardFile	03/17/2006
Award File 1	2037211		System Account	03/20/2006	System Account	In Progress	03/20/2006
Award File 2	2037220		System Account	03/20/2006	System Account	In Progress	03/20/2006
Award File 3	2037220		System Account	03/20/2006	System Account	In Progress	03/20/2006
Award File 4	2037231		System Account	03/20/2006	System Account	In Progress	03/20/2006
Award File 5	2037234		System Account	03/20/2006	System Account	In Progress	03/20/2006

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**Associated Documents**

24 items found, displaying all items 1

Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date	Program Officer
Award Action Request	2037211	Sub award transfer or contracting out of any work...	aweed swah	03/20/2006	aweed swah	Completed	03/20/2006	
Award Action Request	2037221	No Cost Extension - without invocation of Expanded...	aweed swah	03/20/2006	aweed swah	CAMSFirstApproverActions Not Started	03/20/2006	
Award Action Request	2037231	Reprogram or Rebudget	aweed swah	03/20/2006	aweed swah	GrantsOfficerActions Complete ApproveRequest	03/20/2006	

- Scroll down to the bottom of the *Grants File* screen to view the *Associated Documents* section and view the Performance Progress Reports. It is possible that the report you wish to create was pre-generated in anticipation of you finishing and submitting the report. If the status states “**In Progress**,” then the report is ready for you to complete and submit. Click on the ID link for the report.

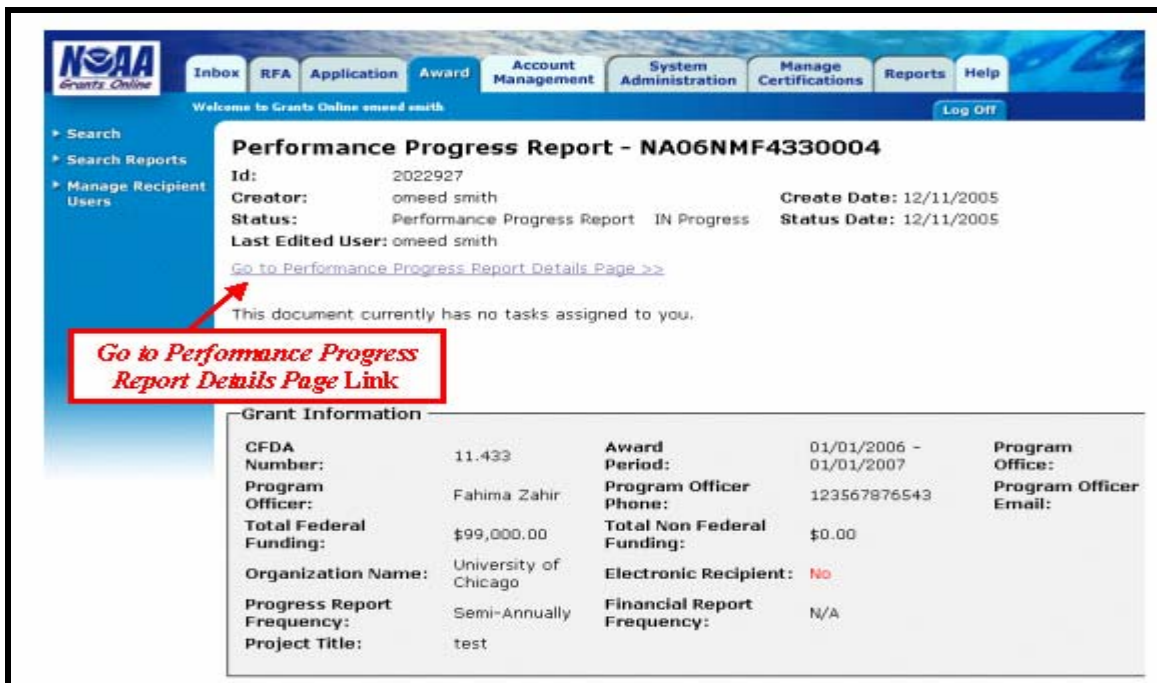
Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date	Program Officer
Performance Progress Report	<a href="#">2036619</a>	07/01/2005 - 11/11/2005	Dennis A. Seem	03/01/2006	Dennis A. Seem	IN Progress	03/01/2006	Undefined
Performance Progress Report	<a href="#">2020051</a>	11/11/2004 - 11/11/2005	David Archer	11/22/2005	Dennis A. Seem	Accepted	01/31/2006	Ingrid Guch



Note: If a Performance Progress record is not available for completion and submission, contact the Grants Online Help Desk to have the necessary report record added to the system.

- The Performance Progress Report Screen is displayed. Select the link entitled, **Go to Performance Progress Report Details Page**. If a Performance Progress record is not available for completion and submission, contact the Grants Online Help Desk and request to have the necessary report record added to Grants Online.

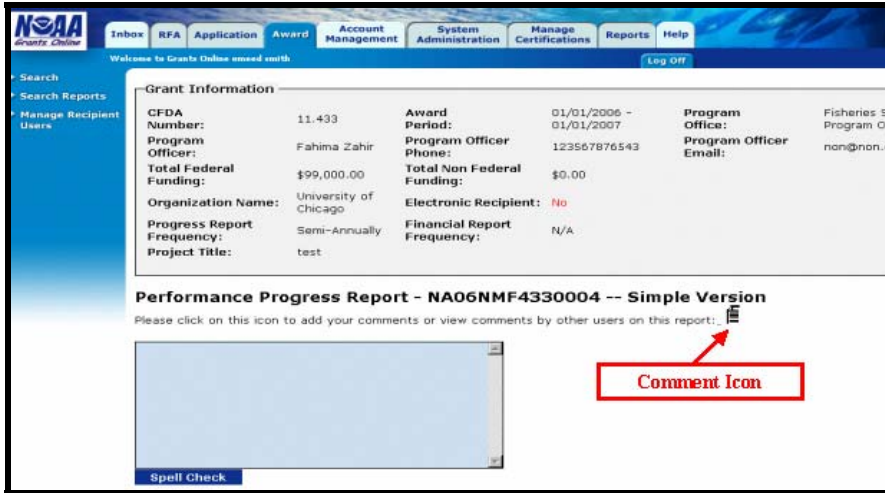




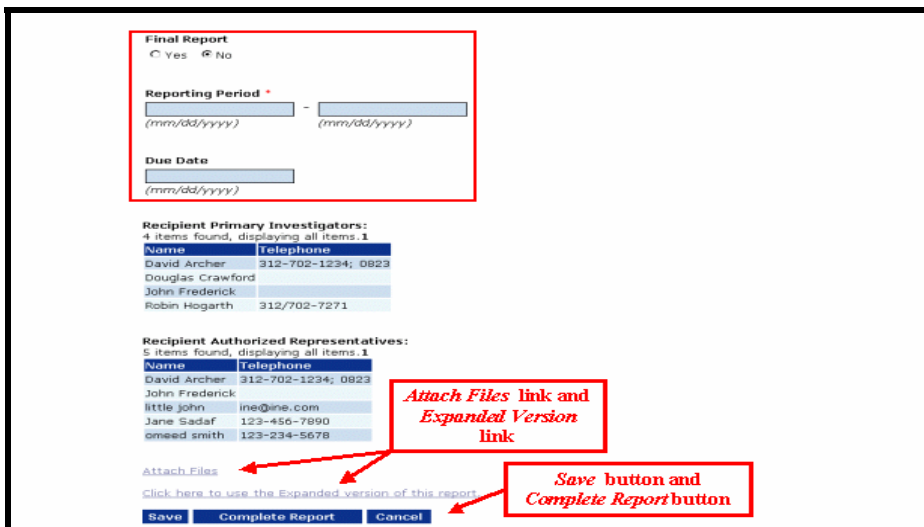
Grant Information			
CFDA Number:	11.433	Award Period:	01/01/2006 - 01/01/2007
Program Officer:	Fahima Zahir	Program Officer Phone:	123567876543
Total Federal Funding:	\$99,000.00	Total Non Federal Funding:	\$0.00
Organization Name:	University of Chicago	Electronic Recipient:	No
Progress Report Frequency:	Semi-Annually	Financial Report Frequency:	N/A
Project Title:	test		



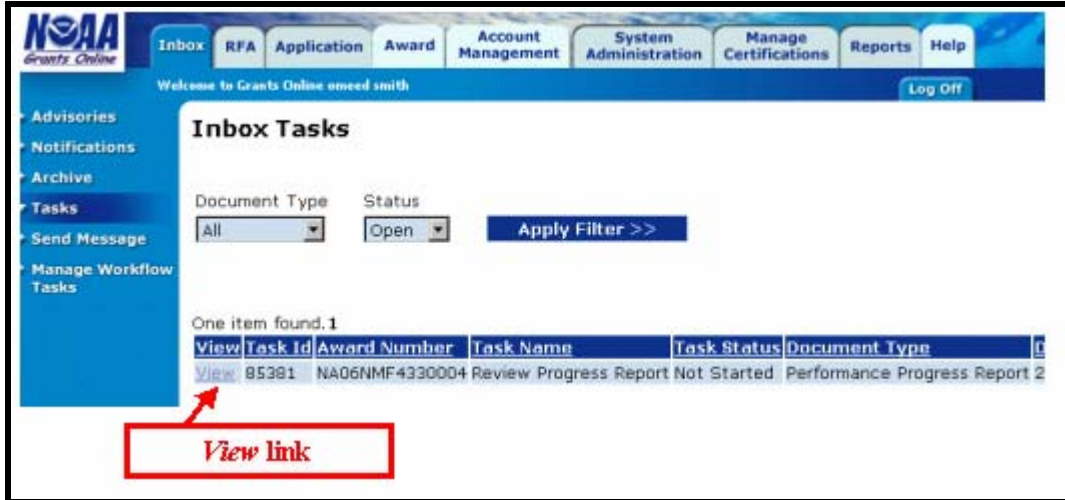
5. The *Performance Progress Report – Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users.
6. The large text box that is visible as part of the simple report screen may be used to provide an overview or introduction to your report, including an explanation of the attached files. Alternatively, if you have a simple or short report, it may be entirely entered in this text box.



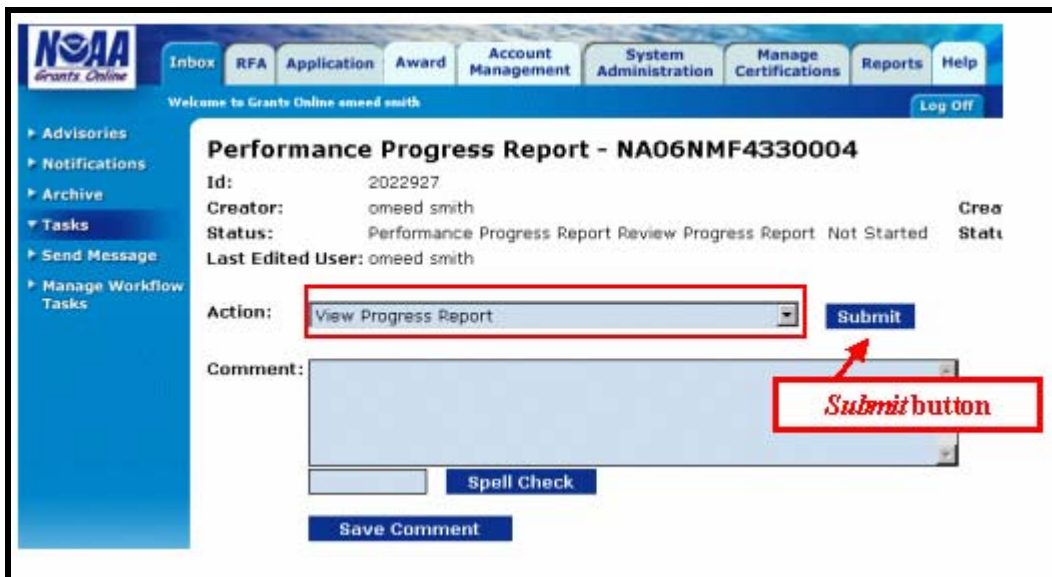
7. Review the detailed Performance Progress Report information, including designation of Final Report, Reporting Period, and Due Date. If you need to change this information, please contact the Grants Online Help Desk.
8. Attach files by selecting the **Attach Files** link.
9. Once all the information has been entered, click the **Save** button, followed by the **Complete Report** button.



- Once you have completed the report and selected the **Complete Report** button from the *Performance Progress Report* screen, you will receive a task to Review the Performance Progress Report. Navigate to the **Inbox** tab, select **Tasks** from the menu on the left, and select the **View** link for the Performance Progress Report task.



- The Performance Progress Report task launch page is displayed. From the action drop down menu select **View Progress Report** and select the **Submit** button.



- 12. After reviewing and editing the Performance Progress Report, select the **Complete Report** button.

The screenshot shows a web form with a 'Due Date' field, two tables of investigator information, and a 'Complete Report' button. The 'Complete Report' button is highlighted with a red box and an arrow pointing to it from below.

**Due Date**  
  
(mm/dd/yyyy)

**Recipient Primary Investigators:**  
6 items found, displaying all items.1

Name	Telephone
David Archer	312-702-1234; 0823
Douglas Crawford	
John Frederick	
Robin Hogarth	312/702-7271
Zach Johnson	xxx
alka kumar	1234567890

**Recipient Authorized Representatives:**  
4 items found, displaying all items.1

Name	Telephone
David Archer	312-702-1234; 0823
John Frederick	
little john	ine@ine.com
omeed smith	123-234-5678

[Attach Files](#)

**Save** **Complete Report** **Cancel**

**Complete Report Button**

- 13. Upon clicking the **Complete Report** button, the task launch page is displayed. From the action drop down menu, select **Forward Progress Report to Authorized Representative** and click on the **Submit** button. A task will be sent to the Recipient Authorized Representative to Review the Performance Progress Report. The Recipient Authorized Representative will have the option to view the Progress Report, return the Progress Report to the creator for revisions, or forward the Progress Report to NOAA.

The screenshot shows the 'Performance Progress Report - NA06NMF4330004' task launch page. The 'Action' dropdown menu is set to 'Forward Progress Report to Authorized Representative' and is highlighted with a red box. The 'Submit' button is also highlighted with a red box and an arrow pointing to it from below.

**Performance Progress Report - NA06NMF4330004**

**Id:** 2022927  
**Creator:** omeed smith  
**Status:** Performance Progress Report Review Progress Report In Progress  
**Last Edited User:** omeed smith

**Action:**  **Submit**

**Comment:**

**Submit button**

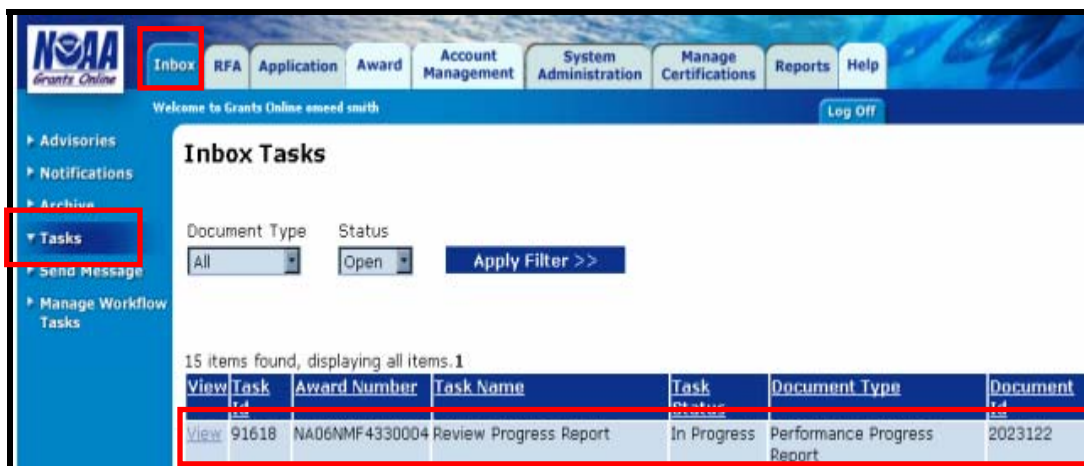
**Spell Check**

**Save Comment**

### Forwarding the Performance Progress Report to the Agency as an Authorized Representative

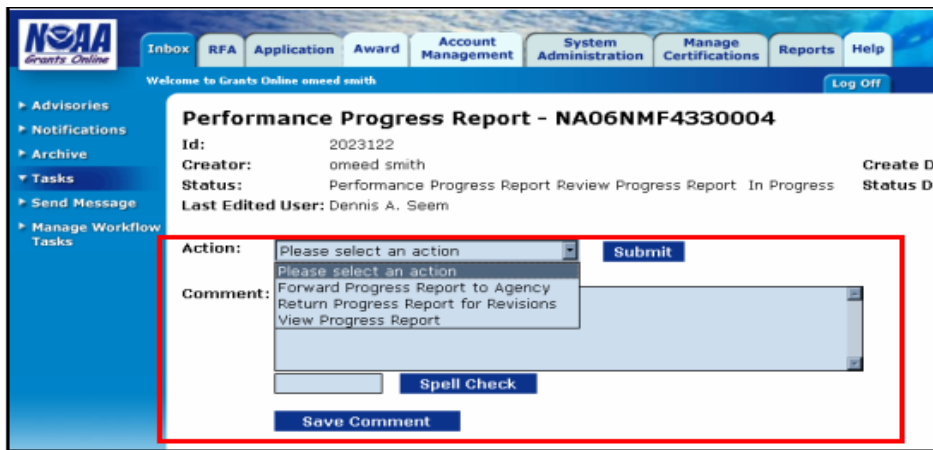
Once a Performance Progress Report is complete, the Authorized Representative will receive a task in their inbox to review the report and forward it to the agency. This task is sent to all of the Authorized Representatives within your organization. For example, if there are three Authorized Representatives within your organization, each of them will receive the task to review the Performance Progress Report. Once one of the Authorized Representatives selects the **View** link for the task, they will own the task and the task will be removed from the inbox of the other two Authorized Representatives.

1. Select the **Inbox** tab followed by the **Tasks** link. Select the **View** link next to the Review Progress Report task.

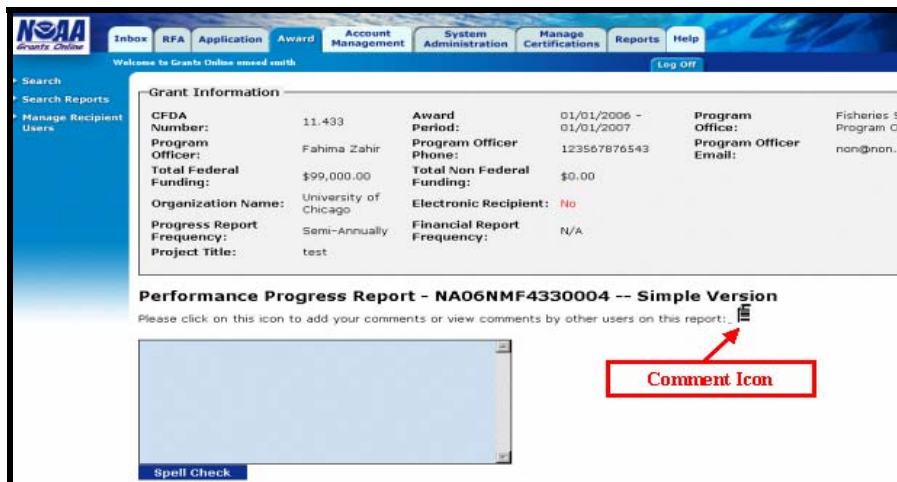


2. The following screen is the task launch page. From this screen you may select one of the following options:
  - **Forward Progress Report to Agency** – Select this action to forward the Progress Report to NOAA for review and Approval.
  - **Return Progress Report for Revisions** – Select this action to return the Progress Report to the creator for revisions. For example, if a Principal Investigator submitted this report, a task to review the Progress Report is sent to the Principal Investigator.
  - **View Progress Report** – Select this action to allow the Authorized Representative to view the report before forwarding the report to the agency.

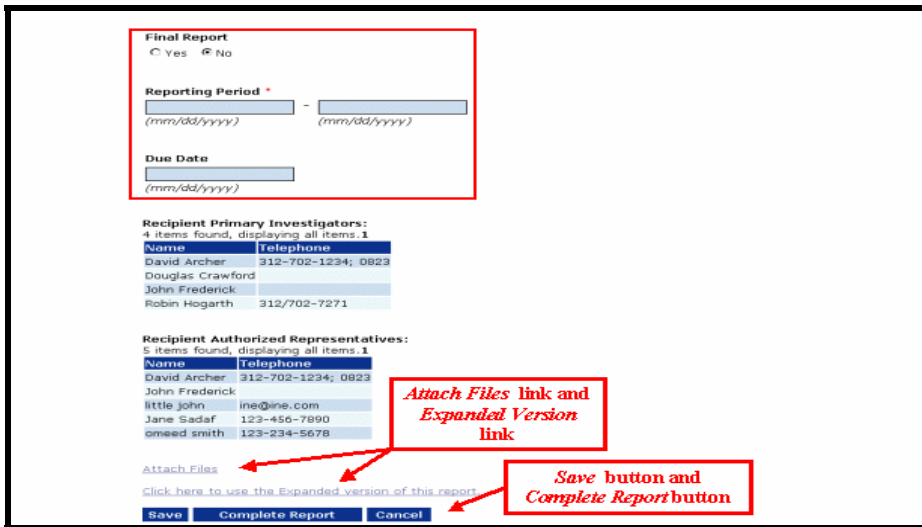
For the purposes of this manual we will select **View Progress Report** followed by the **Submit** button.



3. The *Performance Progress Report – Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users.
4. The large text box that is visible as part of the Simple Report screen may be used to provide an overview or introduction to your report, including an explanation of the attached files. Alternatively, if you have a simple or short report, it may be entirely entered in this text box.



5. Review the detailed Performance Progress Report information, including designation of Final Report, Reporting Period, and Due Date. If you need to change this information, please contact the Grants Online Help Desk.
6. View and edit the attached files by selecting the **Attach Files** link.
7. Once all the information has been reviewed, click the **Save** button, followed by the **Complete Report** button.



8. The following screen is the task launch page. We are now going to select the **Forward Progress Report to Agency** action followed by the **Submit** button. This action will forward the Progress Report to NOAA for review and Approval. You may also enter a comment for NOAA in the COMMENT field. Be sure to enter and save your comment before selecting an action and submitting.

