

Training Manual

Grants Online Overview& System Navigation

Grants Online Release 2.18 Last Update: January 15, 2008

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Document Conventions

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 within Grants Online.

Using this Guide

Use the following writing conventions as a guide in using the manual. The manual uses block label text in order to scan for the information desired.

Text Conventions

Text; Example What it means.

Text in Bold: Click **Done** Indicates a command.

Text in Italics; *Amendment Details* Indicates a screen. screen appears.

Text in Bold Italics; *Name* 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 additional information or advisories when using Grants Online.

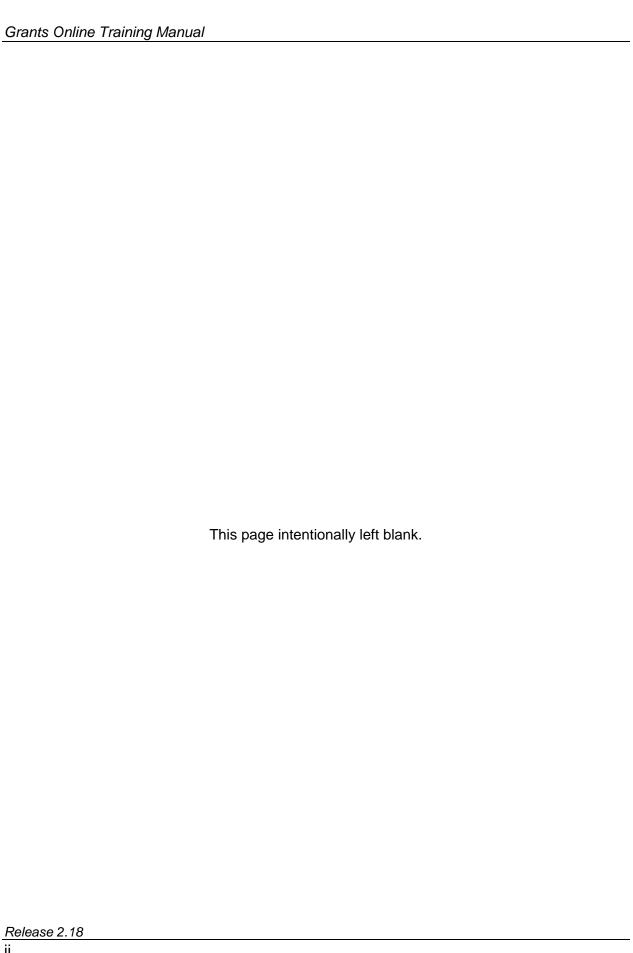


Note: A note is used to inform you about additional information during the procedure or process.



Warning!

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



Grants Online Overview

Overview

The National Oceanic and Atmospheric Administration (NOAA) offer a variety of competitive and non-competitive grants or 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 to process the grants and to ensure the awarding of the grant is given to the most qualified applicant for a competitive award, and for qualified designated applicants of non-competitive awards.

As part of its strategy to move scientifically and operationally into the 21st century, Grants Online was developed. Grants Online is an E-Government initiative to create an automated tool that will support the grant evaluation, award, management, and operations process. 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:

- Reducing or eliminating 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 Reviewers.
- 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

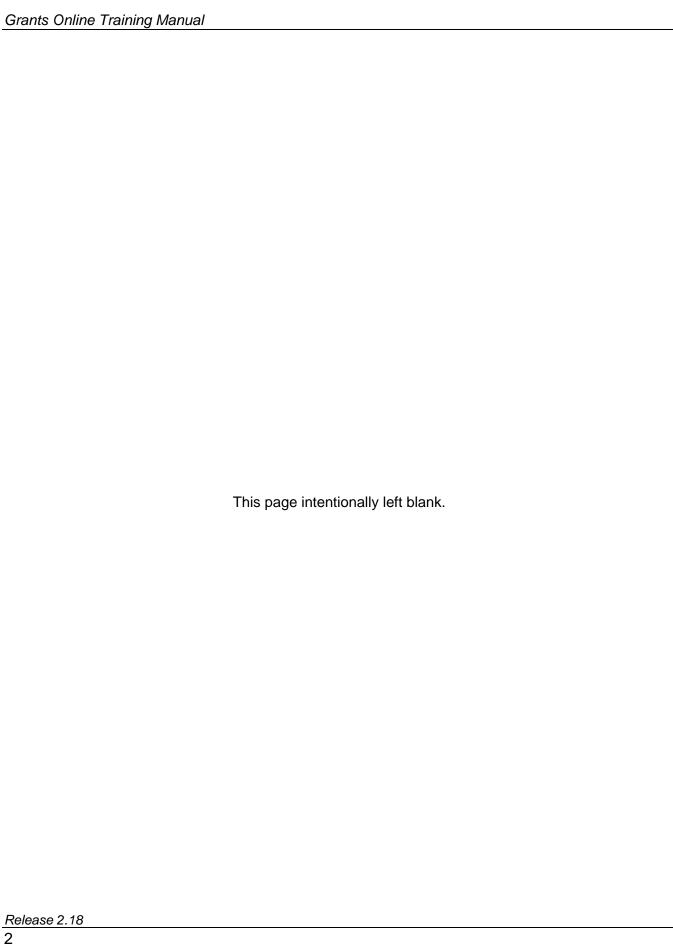


Note: You must have an Internet connection in order to access Grants Online.



Warning: Please do not use the browser "Back" button in Grants Online.

Using the browser "Back" button will log you out of Grants
Online.



Getting Started

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 to navigate and use 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.

Manual Objectives

By using this Manual you will be able to accomplish the following objectives:

- Obtain your password
- Login to the system
- Identify Grants Online screen features
- Manage your Inbox
- Update your Profile
- Find Award information

Overview

Grants Online is accessible through your web browser, preferably Internet Explorer.

Accessing Grants Online

- 1. Click on the Internet Explorer Icon on your desktop or Start Menu
 - Internet Explorer browser opens
- **2.** Enter the following URL information in your address bar of your browser:

https://grantsonline.rdc.noaa.gov then press ENTER

- Grants Online Home Page/Login Screen appears
- 3. Before logging into Grants Online, from this screen you can access the Public Search feature as well as other useful links, including the Grants Online Training page.



Logging in to Grants Online

- 1. If you haven't already obtained your Username and Password, contact the Grants Online Help Desk if you are an Internal NOAA/DOC user or your Recipient Administrator if you are a grantee. If you have been designated as the Recipient Administrator for your organization, contact the Grants Online Help Desk for additional assistance:
 - Phone: 301-444-2112 or toll free 1-877-662-2478
 - Email: grantsonline.helpdesk@noaa.gov
- 2. On the Grants Online Login Screen, enter your assigned *Username*
- 3. Enter your assigned **Password**
- 4. Click Enter





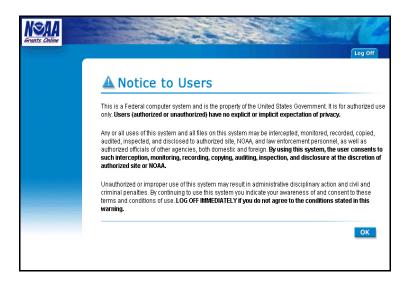
Warning!

If you entered your username or password incorrectly you will see an error message in red on the screen. After three unsuccessful attempts to log in, the system will lock you out and you will have to contact the Grants Online Help Desk to unlock your account. Click on the "Forgot your Password?" link for the Help Desk Phone Number.

If nothing happens when you click the Enter button, it means the se Grants Online server is down and will need to be restarted.

Logging in to Grants Online

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



Grants Online Navigation Features

Overview

Navigating Grants Online is a simple process. The look and feel of the system requires the use of a mouse and keyboard for navigation. Access to certain features of Grants Online is based on your user role. Your user role determines the required access for you to do your work in Grants Online.

Screen Layout



Screen Layout Defined

Once you have successfully logged into Grants Online, the system will default you to the Inbox tab. Grants Online is actually broken into several areas:

 <u>Tabs</u>: Highlighted by the gold border and located at the top of the page are Grants Online Tabs. Use the Tabs to navigate within the different areas of Grants Online. Click on the appropriate Tab to navigate to the desired area.



Note: Access to various Tabs is determined by your user role. A grayed out Tab will denote restricted areas. If trying to access a restricted area, a pop up message will display, stating "Unauthorized to access this area" (see below).



- Navigation Pane: Highlighted by the red border, is the navigation pane. Based on the Tab that you are currently on, commands for certain function display here. Click on the desired command to go to that specific screen.
- <u>Document Pane</u>: Highlighted by the black border, is the document pane. This is located in the middle of the screen. This is where most of the data in Grants Online will be input.

Other User Interface Features

Since the go-live of Grants Online in January 2005, other features have been added to the User Interface to facilitate the ease of navigation through the system.

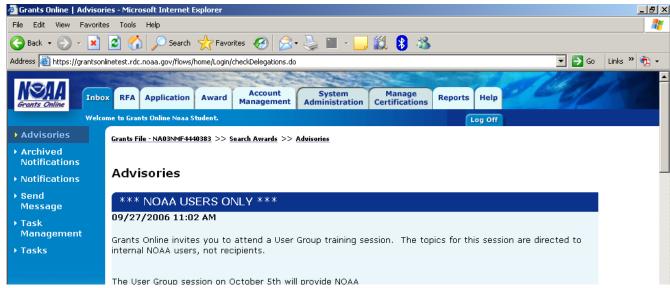
Pop Up Short Cuts

When placing your cursor over a tab at the top of the screen you will get a pop-up menu that contains the same links as the left navigation pane for that tab. This will allow you to navigate directly to one of those areas without clicking on the tab first.



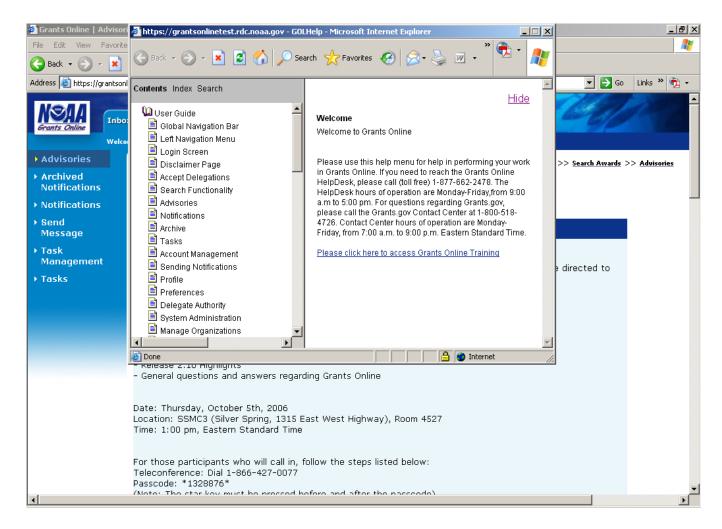
Breadcrumbs

The Grants Online system keeps track of the pages you have visited since you last logged on and put a "breadcrumb trail" of those pages at the top of the Document Pane. This feature can be used in place of a "Back" button.



Help Tab

The Help Tab provides information on accessing the Grants Online Help Desk as well as definitions and/or guidance for various Grants Online functions.

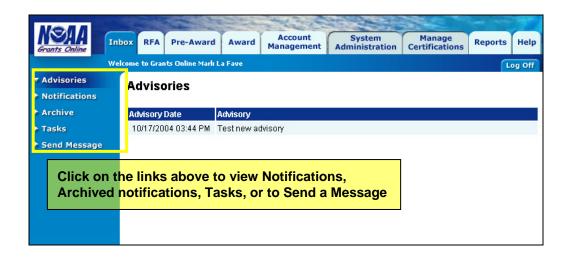


Inbox Tab

Managing your Inbox is a straightforward task. From your Inbox you can access and view information related to: system advisories, notifications and tasks. You may also send an email to a group or to an individual.

Advisories

Upon successfully logging into the system, you will be taken by default to the advisories page within the Inbox Tab. In figure 3, you can view any advisories noted in the system. These are created by the system administrator and cannot be edited.



Accessing Notifications

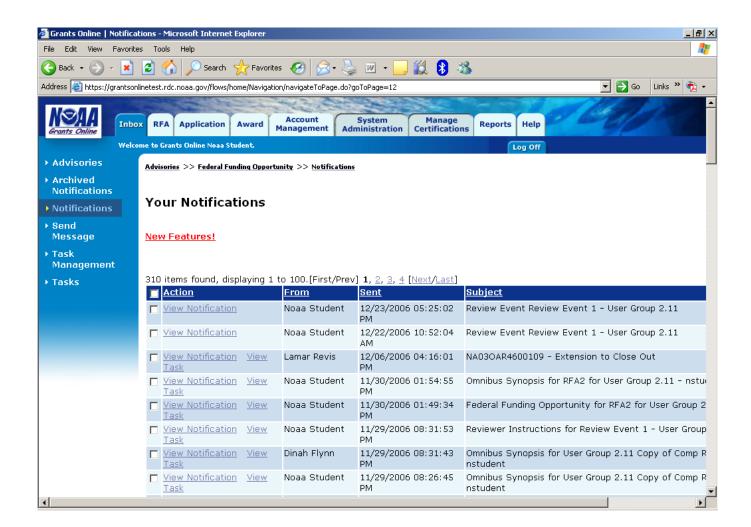
- 1. From the Inbox Tab, click **Notifications**
 - Notifications screen appears

Notifications

Notifications are displayed in your Inbox to inform you that you have tasks assigned to you through the workflow process. Other types of notifications include information related to: direct assignments, status within the workflow process, and overdue tasks. You can archive your tasks or delete them by checking the box and clicking on the blue Archive or Delete button.



Note: You can modify the notifications that appear in your Inbox through the Account Management Tab. Archived notifications appear in your Archive folder, accessible by clicking on the Archive link.



Viewing Notifications

- Click on the View Notification link next to the notification you wish to view (Pop-up of notification details appears when cursor is placed on the link.)
 - Notification details screen appears
- 2. Click Cancel to close the details screen and return to the Notifications list
- 3. NOTE: You can navigate directly to the task by clicking on the View Task link



Archiving and Deleting Notifications

- Click the check box next to the notification you wish to archive or delete
- 2. Click the blue **Archive** button or the blue **Delete** button
 - The task is moved to the Archives folder or is permanently deleted



ote: You can delete or archive an entire page of your notifications at once by checking the box in the header column (seen below)





Warning!

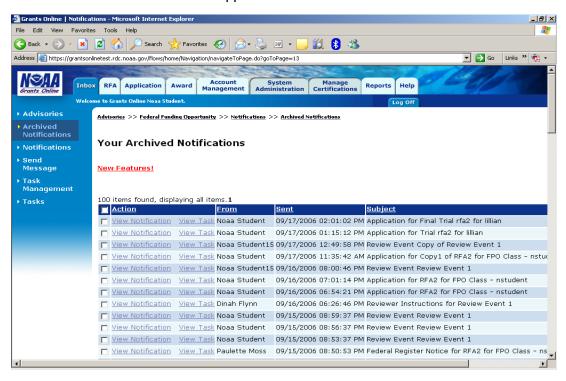
Once a notification is deleted, it cannot be recovered.

Archived Notifications

Archived Notifications is your personal repository for all notifications you would like to maintain for historical purposes.

Accessing Archived Notifications

- From the Inbox Tab, click Archived Notifications
 - Archived Notifications screen appears



Viewing Archived Notifications

- Click View next to the notification you wish to view
 - Notification details screen appears
- 2. Click **Cancel** to close the details and return to the *Archived Notifications* list

Deleting Archived Notifications

- 1. Select the notification you wish to delete by clicking in the check box next to that action
- 2. Click the **Delete** button at the bottom of the screen
 - The task will be removed from Archived Notifications



Warning!

Once a notification is deleted, it cannot be recovered

Send Message (Send Notifications)

Notifications can be created to send to an individual or to a group. The email is sent to the email address indicated in the user's profile.

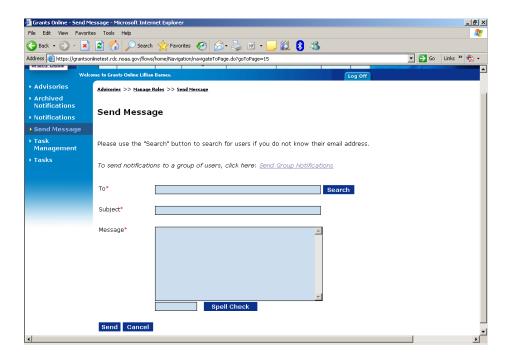


Note: Notifications will be sent with a "From" email address of <u>GrantsOnlineQandA@noaa.gov</u>. You must include your own name in the <u>body</u> of the email message so the receiver will know who the email is actually from.

Accessing Send Message

From the Inbox Tab, click Send Message

Send Message screen appears

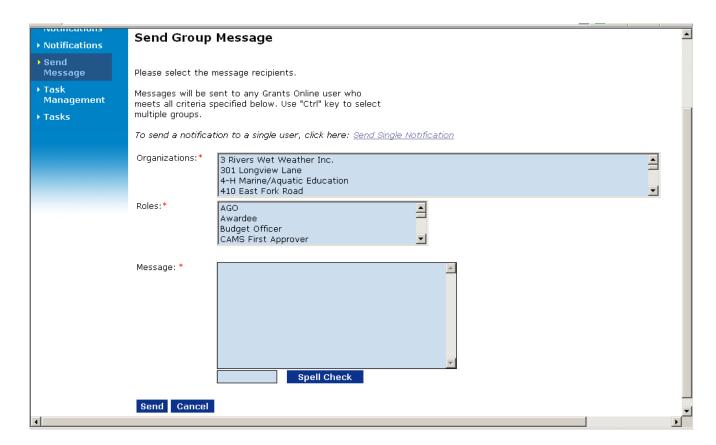


Sending Individual Notifications

- 1. Click the **Search** button besides the "To" field
- 2. Select the individual to whom you wish to send a notification
- **3.** Type the body of the notification in the MESSAGE box
- 4. Click **Spell Check** to check your spelling
- 5. Click **Send** once the message has been completed

Sending Group Messages

- 1 From the Send Message screen Click Send Group Notifications
- **2** Select the individuals to whom you wish to send a notification (You must select from both the ORGANIZATIONS and ROLES fields).
- 3 Type the body of the notification in the MESSAGE box
- 4 Click Send

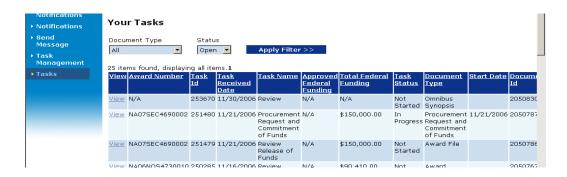


Tasks

While Notifications alert you to an action you must complete, Tasks allow you to complete that action assigned to you within the workflow. Tasks that are assigned to you can be located in the Task section in the Inbox Tab.

Accessing Tasks

- 1. From the Inbox Tab, click **Tasks**
 - Your Tasks screen appears





Note: Customizing the Tasks view may be accomplished through the Account Management Tab.

Viewing a Task

- Click View next to the task you wish to view
 - Launch Page appears. From this page you may perform your assigned work by selecting an action in the action dropdown.

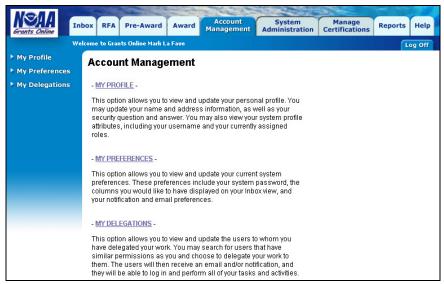
Filtering Tasks

- 1. Select the **Document Type** in the drop-down menu
- 2. Select the **Status** in the drop-down menu
- 3. Click Apply Filter
 - Tasks screen appears showing only filtered tasks.



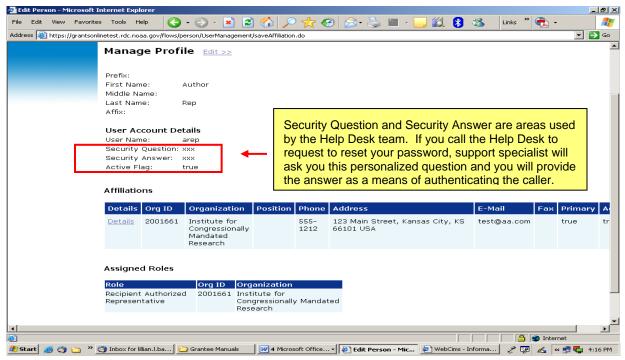
Account Management Tab

The Account Management Tab allows you to view your Profile, Preferences and Delegations. Within this tab you can update your profile, customize your Notifications and Tasks preferences, and delegate your inbox to other users.



Accessing My Profile

- 1. From the Account Management Tab, click My Profile
 - Manage Profile screen appears

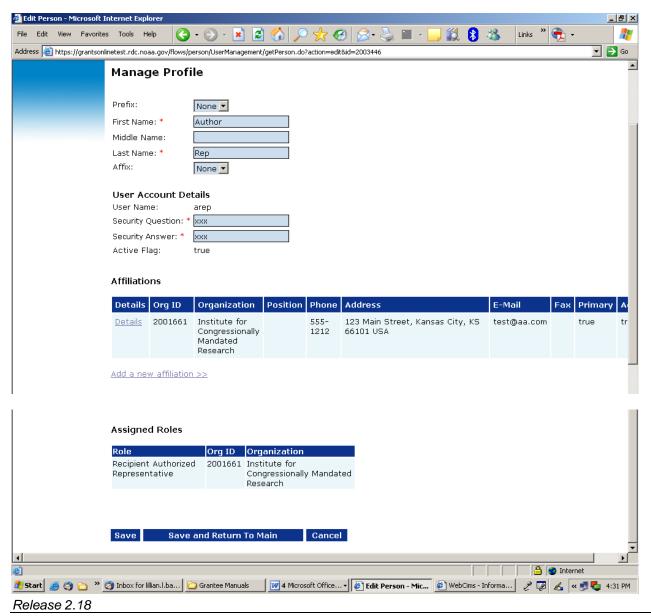


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Note: To change roles and affiliations, contact the Help Desk

Editing Your Profile

- 1. Click **Edit** (once you click edit, the screen will become formatted like the one below)
- 2. Make the necessary changes (Click on the "Details" link under Affiliations to update phone, address, and/or email information.)
- 3. Click **Save** to capture your changes
- 4. Click Save and Return to Main to return to the Account Management tab main screen
- 5. Click Cancel to go back to the previous screen (any changes you made will NOT be saved)

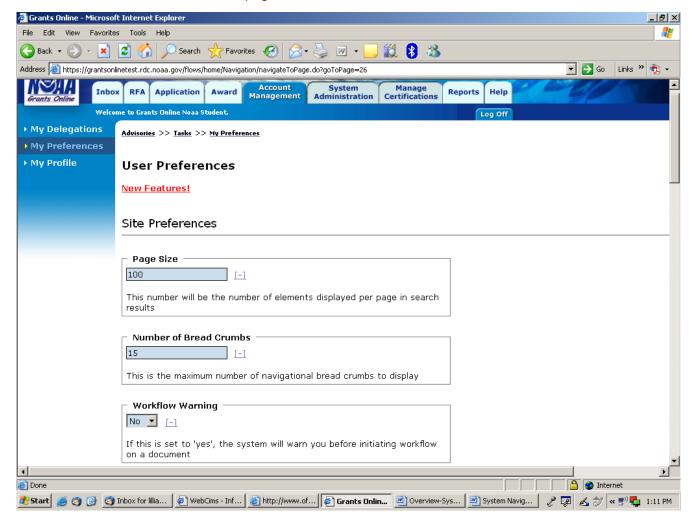


My Preferences

Customize your viewing preferences through the *My Preferences* screen. You may add/remove email Inbox notifications. This will remove notifications sent to your external email account only. Headings may be customized to display certain fields on your Tasks and Notifications screens. Additionally, you may change your password for Grants Online.

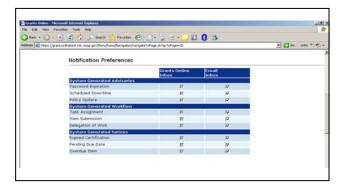
Accessing My Preferences

- 1. From the Account Management Tab, click My Preferences
 - User Preferences screen appears
- 2. Customize Page Size, Bread Crumbs, and Workflow Warning as desired.
- 3. Click **Save** at the bottom of the page.



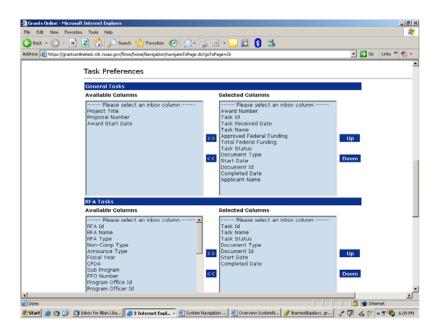
Customizing Notifications

- 1. Select desired type of Notification to enable/disable
- 2. Click box to enable or disable to the right of the task
- 3. Click **Save** at the bottom of the page.



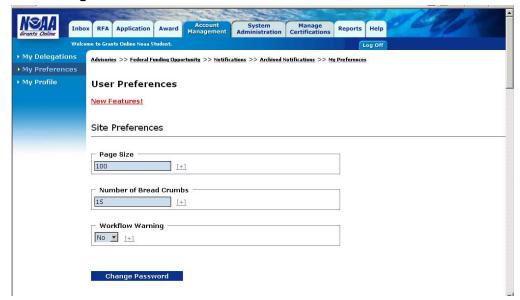
Customizing Tasks

- 4. Select desired type of Notification to enable/disable
- 5. "Push" and "Pull" task columns to select the desired columns for display in *Your Inbox*.
- 6. Use "Up" and "Down" buttons to select the desired column order for display in Your Inbox.
- 7. Click **Save** at the bottom of the page.



Changing Your Password

1. Click the blue **Change Password** button in the *User Preferences* screen



- Change Password screen appears
- 2. Enter old password (see picture below)
- 3. Enter new password (see picture below)
- 4. Enter new password again to confirm (see picture below)
- 5. Click Submit





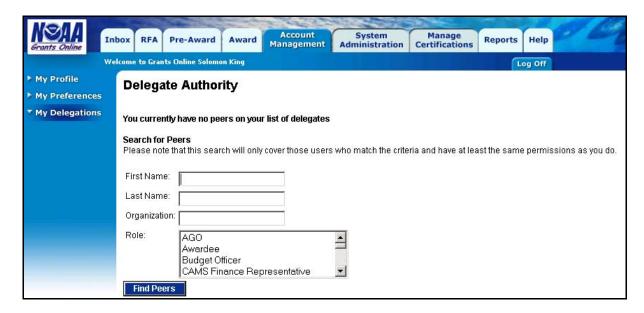
Please follow the indicated Password Guidelines. Also, note that the special characters listed are the ONLY ones that are valid (_\$#)

My Delegations

When you select the My Delegations link in the Account Management Tab, you will be able to view existing delegates, add delegates and rescind delegates. The only people you can select to be a delegate are those that have roles matching yours. Example – a Program Officer cannot create a delegation to an individual who only has the role of Budget Officer.

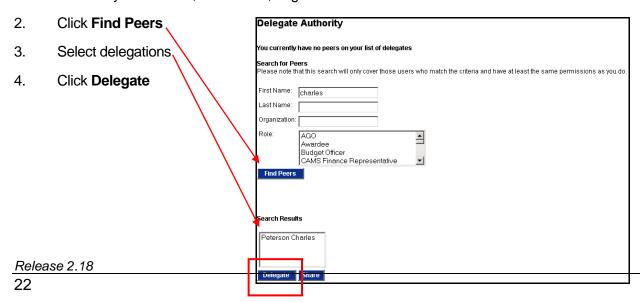
Accessing My Delegations

- 1. From the Account Management Tab, click My Delegations
 - Delegate Authority screen appears



Adding a Delegation

1. Search by First Name, Last Name, Organization or Role



Rescinding a Delegation

- 1. From the Account Management Tab, click **My Delegations**
 - My Delegations screen appears
- 2. Click on **Rescind** to remove the individual as your delegate



Logging in as a Delegate

- 1. Log in to Grants Online with your normal user name
- 2. Click **OK** on the *Notice to Users* page
- 3. Choose to either continue in as yourself (**Continue to Inbox**) or to go in as the person who delegated to you (**Select** by the person's name)



Warning!

It can take up to three minutes for the system to process your request to go in as a delegate .





Note: When you are in Grants Online as a delegate, the system will identify you as a delegate of that individual (see below). ** Both you and the delegate can work in Grants Online simultaneously.



Award Tab

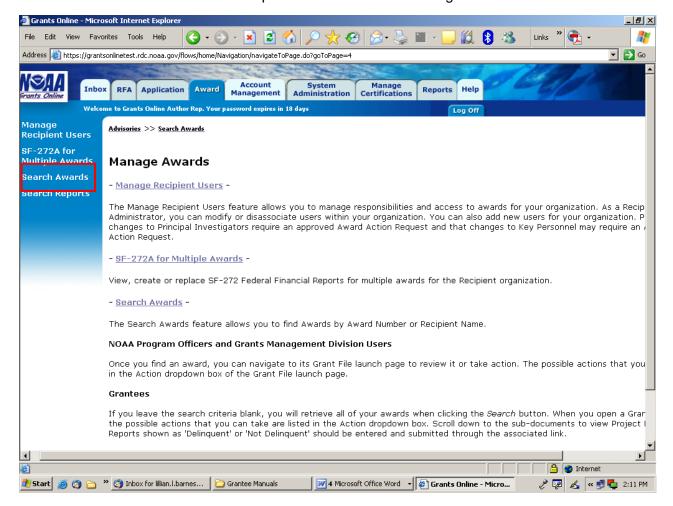
This section will provide you with a step-by-step process on how to search for an Award that has been signed by a Grants Officer. (Awards in Process are not viewable by Recipients.)

If you are a recipient, please refer to the Grantees Quick Reference Guide or the following Grantee Training Manuals for additional guidance on Award Tab functions:

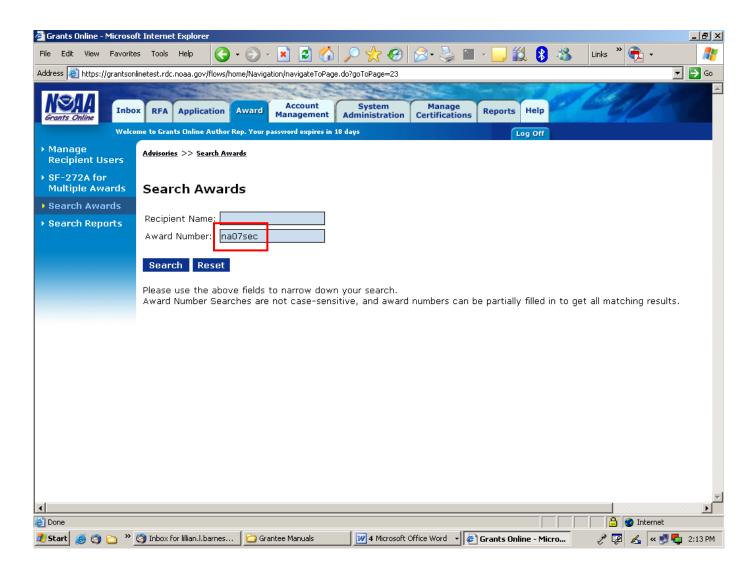
- 1. Accepting Awards and Managing Recipient Users
- 2. Performance Progress Reports
- 3. Federal Financial Reports
- 4. Award Action Requests

Searching for an Award

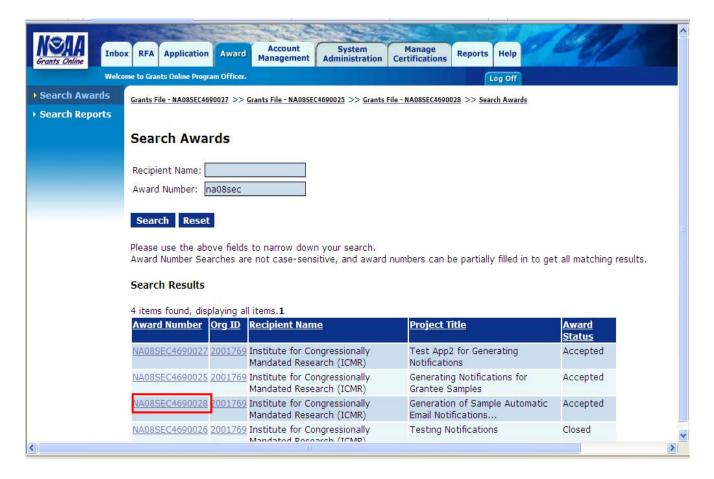
- 1. Once you have logged in to Grants Online, click on the Award tab
- 2. Click on the **Search Awards** option to search for an existing award



- 3. Enter search criteria if desired. Leave blank to display all awards to which you have access.
- 4. Click **Search**



- 5. The results from your search will display under the Search Results header
- 6. Select the Award you want to view by clicking the **Award Number** link.



7. The Grants File Launch page is now displayed. From here you can navigate to any document related to this award.

