



Grantee Training Manual

Grants Online Overview & System Navigation

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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; <i>Amendment Details</i> screen appears.	Indicates a screen.
	Text in Bold Italics; <i>Name</i>	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.

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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.

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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 your Recipient Administrator. If you have been designated as the Recipient Administrator for your organization, contact the Grants Online Help Desk:
 - 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**

ABOUT GRANTS ONLINE | OPPORTUNITIES | PROGRAMS | SEARCH | SITE MAP | HELP

NOAA
Grants Online

Welcome to
Grants Online

General Public
Use our Public Search feature to see information pertaining to awarded NOAA grants.

Grant Applicants
To Find and Apply for a NOAA grant, go to the grants.gov website.

Current Grant Recipient

- View information about your current NOAA grants
- Submit post-award action requests, progress reports, and financial reports
- Correspond with your NOAA Program Officer and Grant Specialist

Reviewers

- Access current applications assigned to you
- Submit your review comments and scores

NOAA Staff

- Generate funding notices
- Review grant applications
- Select applications for award
- Process selected applications
- Award and manage grants
- Correspond with Grant Recipients

NOAA Grants Online is the premier Federal solution for full life-cycle grants management processing.

Username
Password
Password Lookup Enter

NOAA
Publication of the National Oceanic & Atmospheric Administration (NOAA), U.S. Department of Commerce.
Last Updated: 2/05/03/09 17:33 v1.6
<http://www.noaa.gov>

Accessibility Privacy Policy



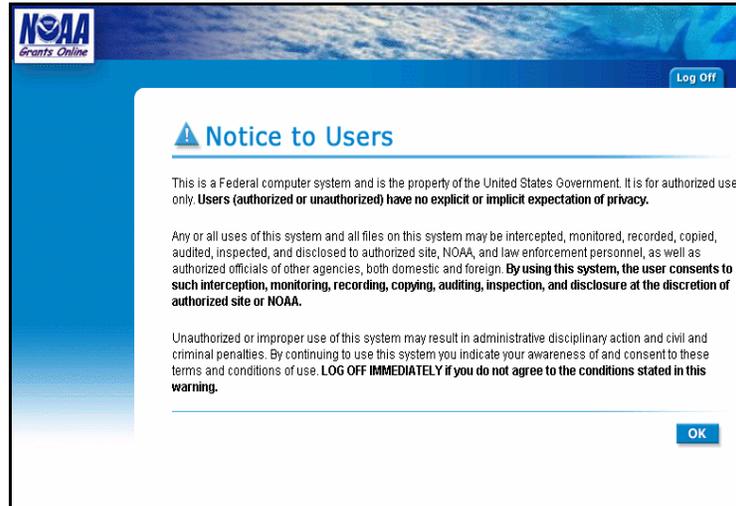
Warning!

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

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

Logging in to Grants Online

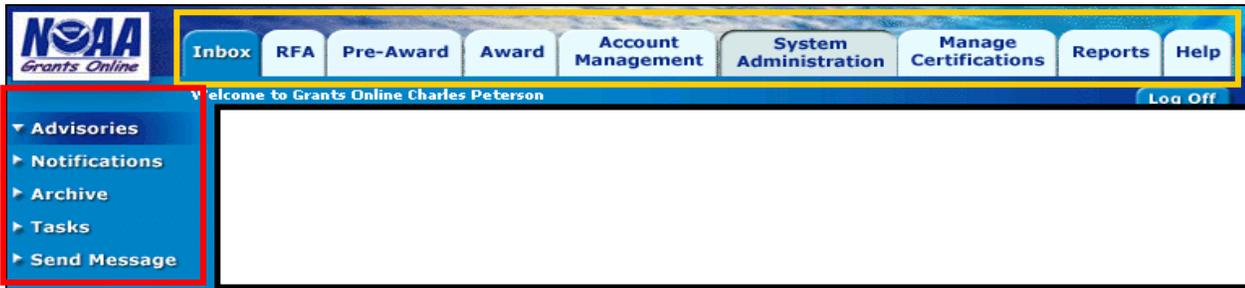
5. The Notice to Users screen appears
6. Review disclaimer information and click **OK**



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:

- **Tabs:** 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).



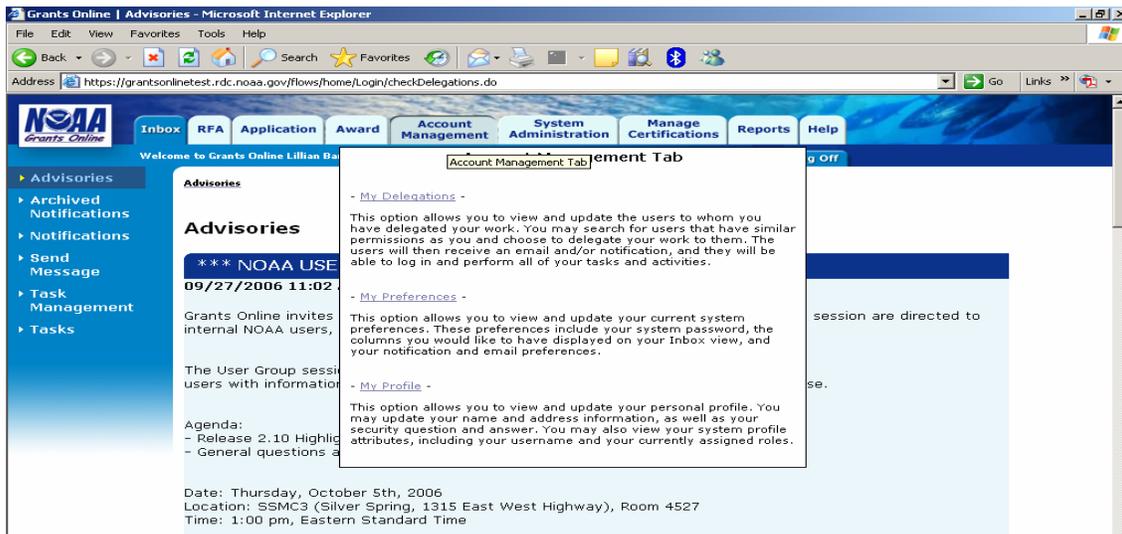
- **Navigation Pane:** Highlighted by the red border, is the navigation pane. Based on the Tab that you are currently on, commands for certain function display here. Click on the desired command to go to that specific screen.
- **Document Pane:** Highlighted by the black border, is the document pane. 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.

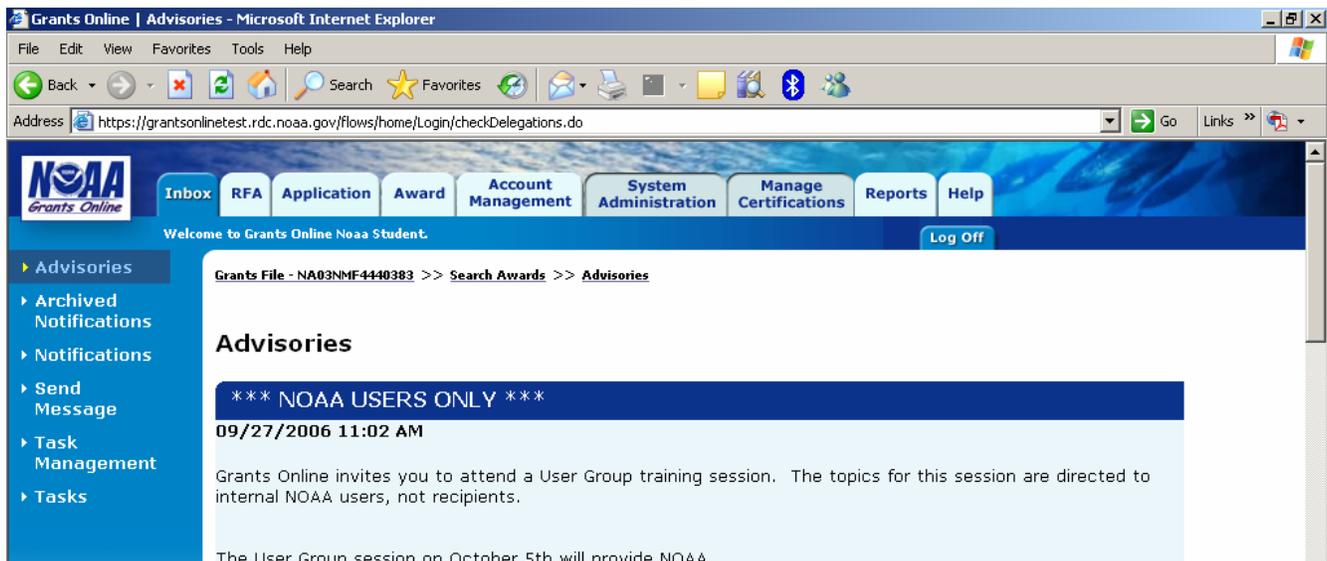
Pop Up Short Cuts

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.



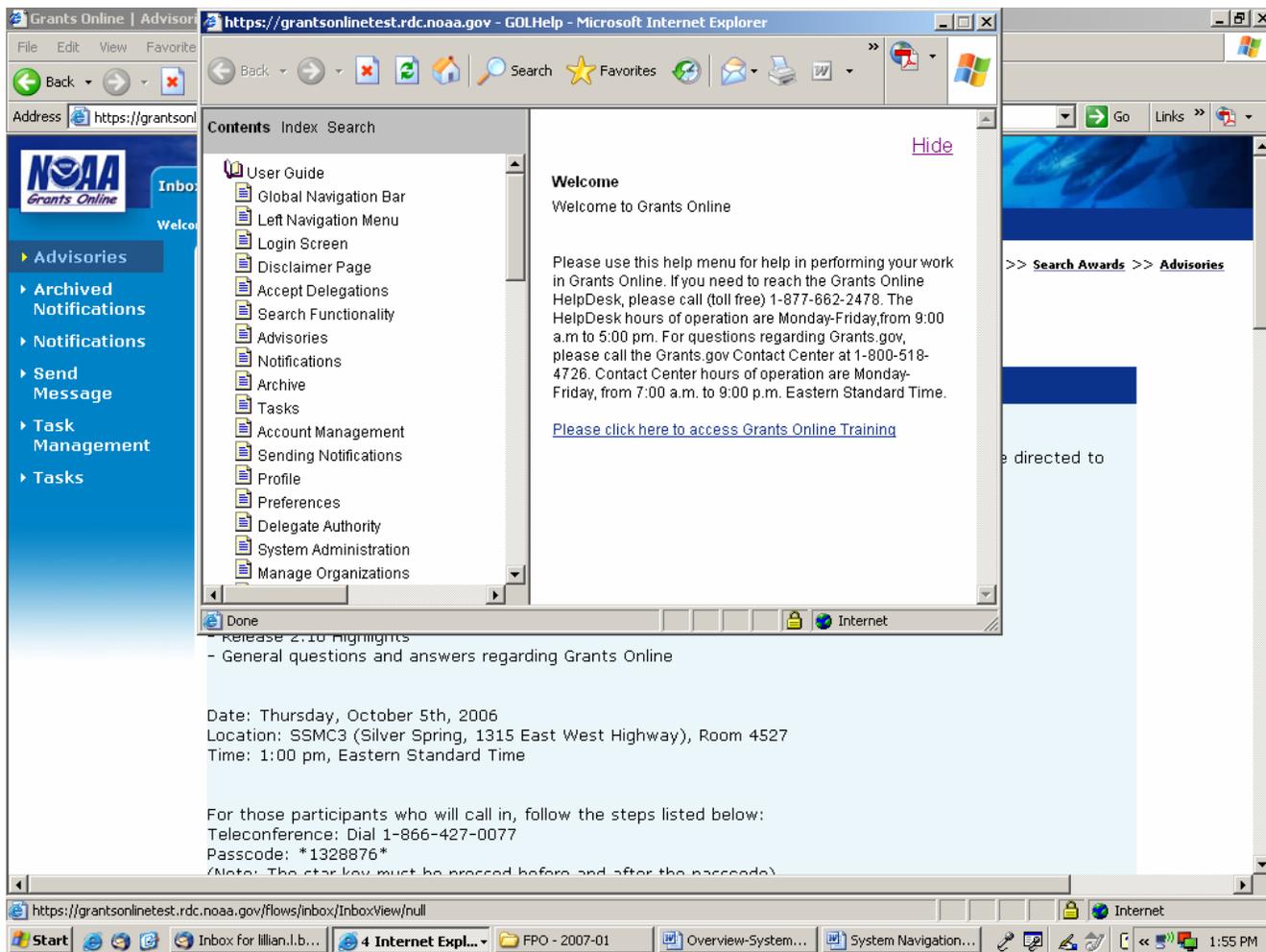
Breadcrumbs

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.

The screenshot shows the NOAA Grants Online interface. At the top, there is a navigation bar with tabs for 'Inbox', 'RFA', 'Pre-Award', 'Award', 'Account Management', 'System Administration', 'Manage Certifications', 'Reports', and 'Help'. Below this, a welcome message reads 'Welcome to Grants Online Mark La Fave' and a 'Log Off' button is visible. On the left, a vertical menu contains 'Advisories', 'Notifications', 'Archive', 'Tasks', and 'Send Message'. The main content area is titled 'Advisories' and contains a table with the following data:

Advisory Date	Advisory
10/17/2004 03:44 PM	Test new advisory

A yellow callout box with a grid pattern is positioned over the 'Advisories' menu item and contains the text: 'Click on the links above to view Notifications, Archived notifications, Tasks, or to Send a Message'.

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.

Action	From	Sent	Subject
<input type="checkbox"/> View Notification	Noaa Student	12/23/2006 05:25:02 PM	Review Event Review Event 1 - User Group 2.11
<input type="checkbox"/> View Notification	Noaa Student	12/22/2006 10:52:04 AM	Review Event Review Event 1 - User Group 2.11
<input type="checkbox"/> View Notification View Task	Lamar Revis	12/06/2006 04:16:01 PM	NA03OAR4600109 - Extension to Close Out
<input type="checkbox"/> View Notification View Task	Noaa Student	11/30/2006 01:54:55 PM	Omnibus Synopsis for RFA2 for User Group 2.11 - nstu
<input type="checkbox"/> View Notification View Task	Noaa Student	11/30/2006 01:49:34 PM	Federal Funding Opportunity for RFA2 for User Group 2
<input type="checkbox"/> View Notification View Task	Noaa Student	11/29/2006 08:31:53 PM	Reviewer Instructions for Review Event 1 - User Group
<input type="checkbox"/> View Notification View Task	Dinah Flynn	11/29/2006 08:31:43 PM	Omnibus Synopsis for User Group 2.11 Copy of Comp R nstudent
<input type="checkbox"/> View Notification View Task	Noaa Student	11/29/2006 08:26:45 PM	Omnibus Synopsis for User Group 2.11 Copy of Comp R nstudent

Viewing Notifications

1. 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

The screenshot shows a web browser window displaying a list of notifications. A pop-up window is open over one of the notifications, showing the following details:

- Award File is pending your review.
- Award Number: NA07SEC4690012
- Project Title:
- Amendment#:
- Recipient: Institute of Congressionally Mandated Research
- Federal Share: \$1,000.00
- Requested Start Date: December 1, 2006
- Program Office: One NOAA Program Office (ONPO)
- Program Officer: NOAA Student Grants Specialist:
- Task Id: 252667
- Document Id: APP 2050805
- Sent From: Phone:

The background list of notifications includes columns for checkboxes, 'View Notification' and 'View Task' links, recipient names (e.g., Lamar Revis, Haja Bah, Internal Reviewer, NOAA Student), dates and times, and subjects (e.g., Award File for NA07SEC4690012, Procurement Request for NA07SEC4690012 - \$1,000.00, NEPA document for NA07SEC4690012 - \$1,000.00).

Archiving and Deleting Notifications

1. 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



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

<input checked="" type="checkbox"/>	Notification ID	Recipient Name	Sender Name	Subject	Created Date
-------------------------------------	-----------------	----------------	-------------	---------	--------------



Warning!

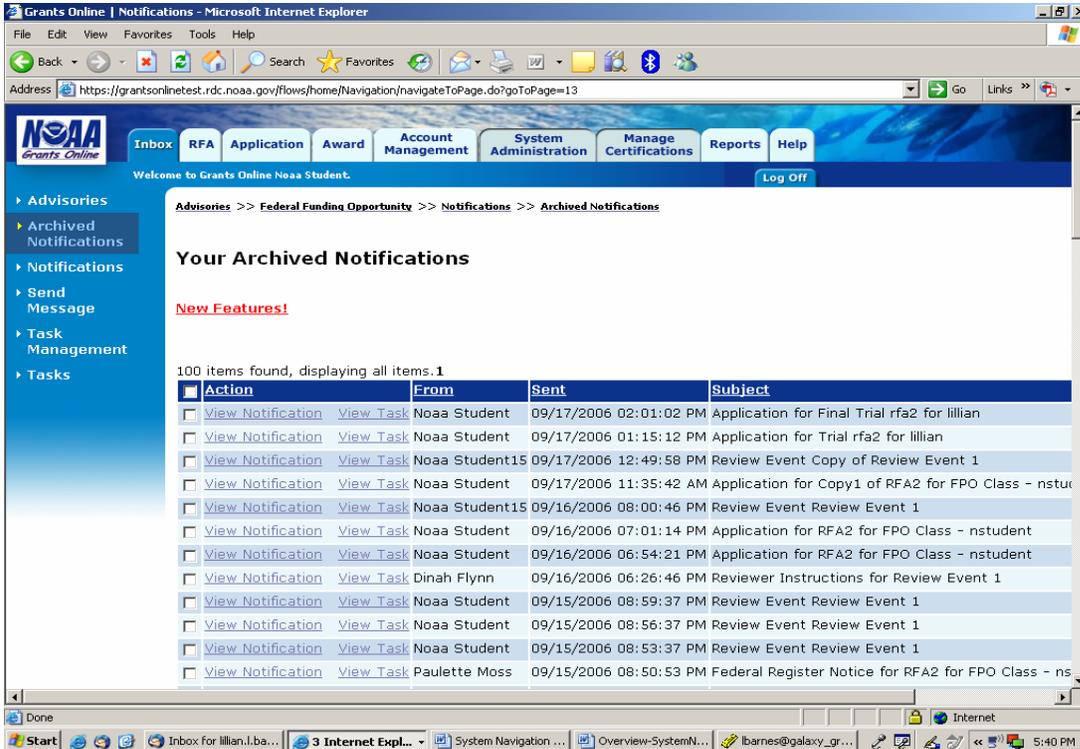
Once a notification is deleted, it cannot be recovered.

Archived Notifications

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

Accessing Archived Notifications

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



Viewing Archived Notifications

1. 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 GrantsOnlineQandA@noaa.gov. You must include your own name in the **body** 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**

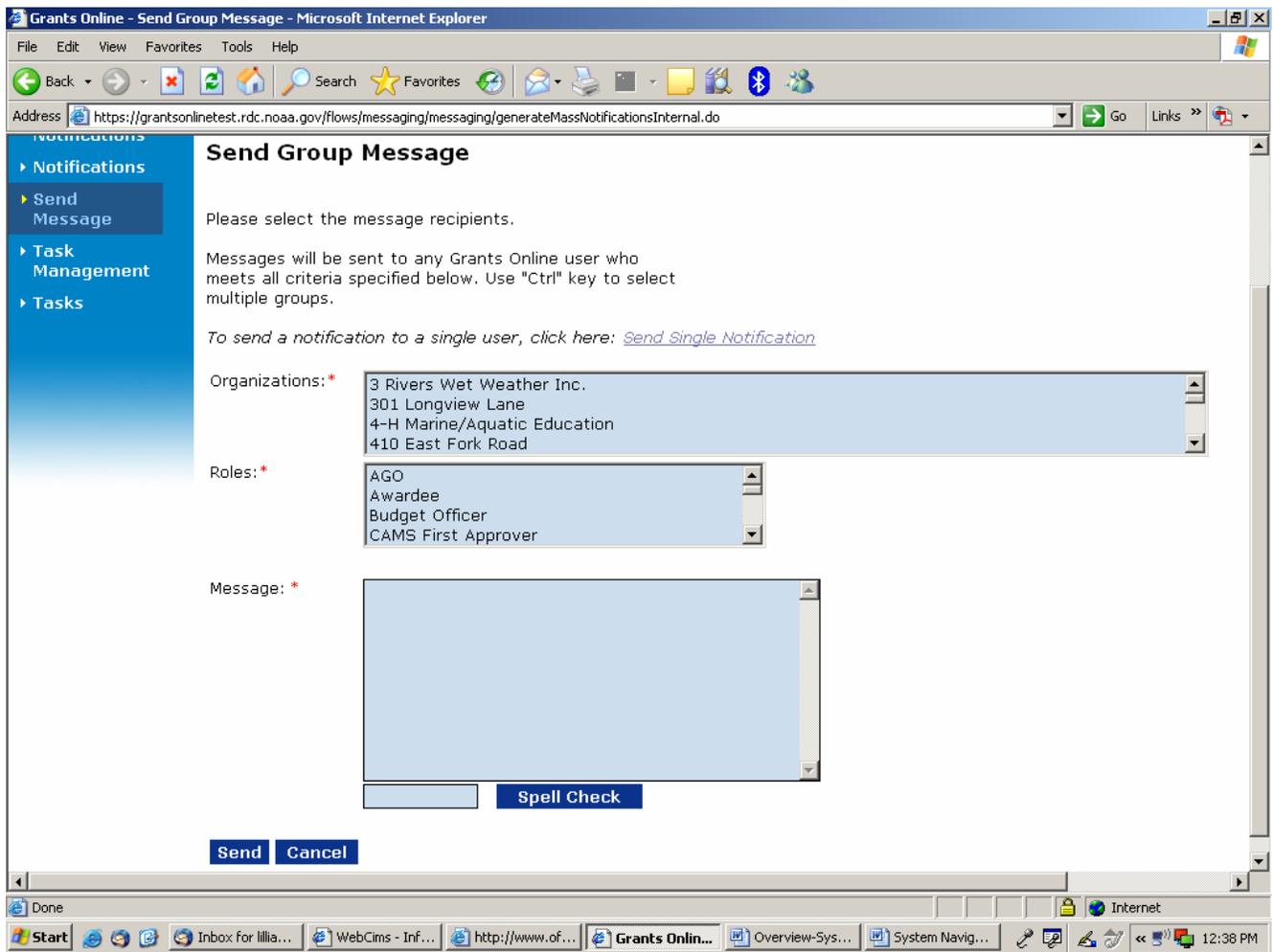
- *Send Message* screen appears

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

View	Award Number	Task Id	Task Received Date	Task Name	Approved Federal Funding	Total Federal Funding	Task Status	Document Type	Start Date	Document Id
View	N/A	253670	11/30/2006	Review	N/A	N/A	Not Started	Omnibus Synopsis		2050830
View	NA07SEC4690002	251480	11/21/2006	Procurement Request and Commitment of Funds	N/A	\$150,000.00	In Progress	Procurement Request and Commitment of Funds	11/21/2006	2050787
View	NA07SEC4690002	251479	11/21/2006	Review Release of Funds	N/A	\$150,000.00	Not Started	Award File		2050786
View	NA06NDC54730010	250285	11/16/2006	Review	N/A	\$0.410.00	Not	Award		2050767



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

Viewing a Task

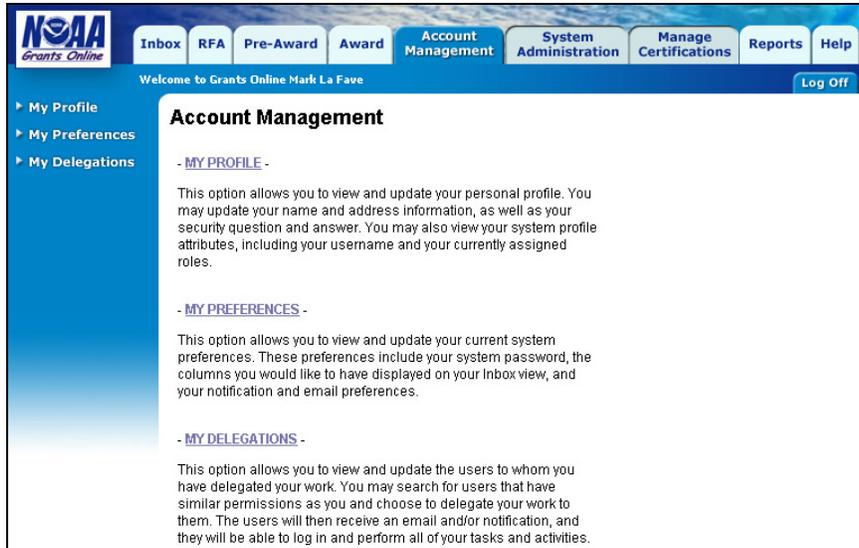
1. Click **View** next to the task you wish to view
 - *Launch Page* appears. From this page you may perform your assigned work by selecting an action in the action dropdown.

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.

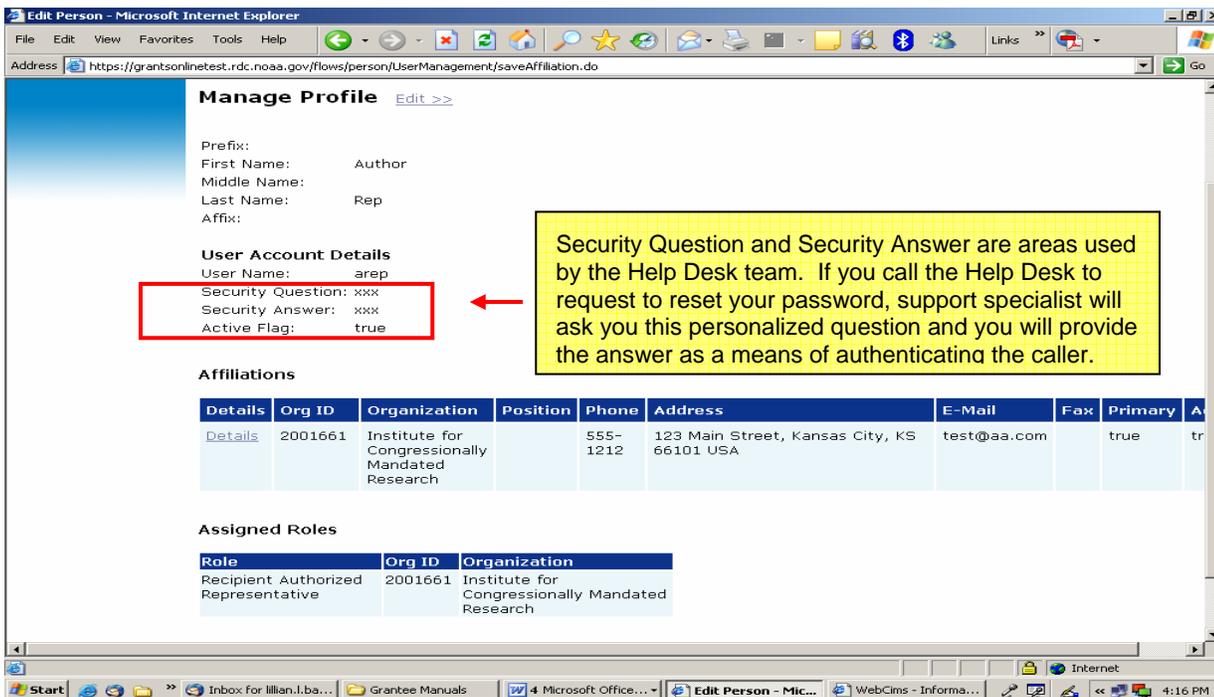
Account Management Tab

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

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



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)

Manage Profile

Prefix:

First Name: *

Middle Name:

Last Name: *

Affix:

User Account Details

User Name: arep

Security Question: *

Security Answer: *

Active Flag: true

Affiliations

Details	Org ID	Organization	Position	Phone	Address	E-Mail	Fax	Primary	A
Details	2001661	Institute for Congressionally Mandated Research		555-1212	123 Main Street, Kansas City, KS 66101 USA	test@aa.com		true	tr

[Add a new affiliation >>](#)

Assigned Roles

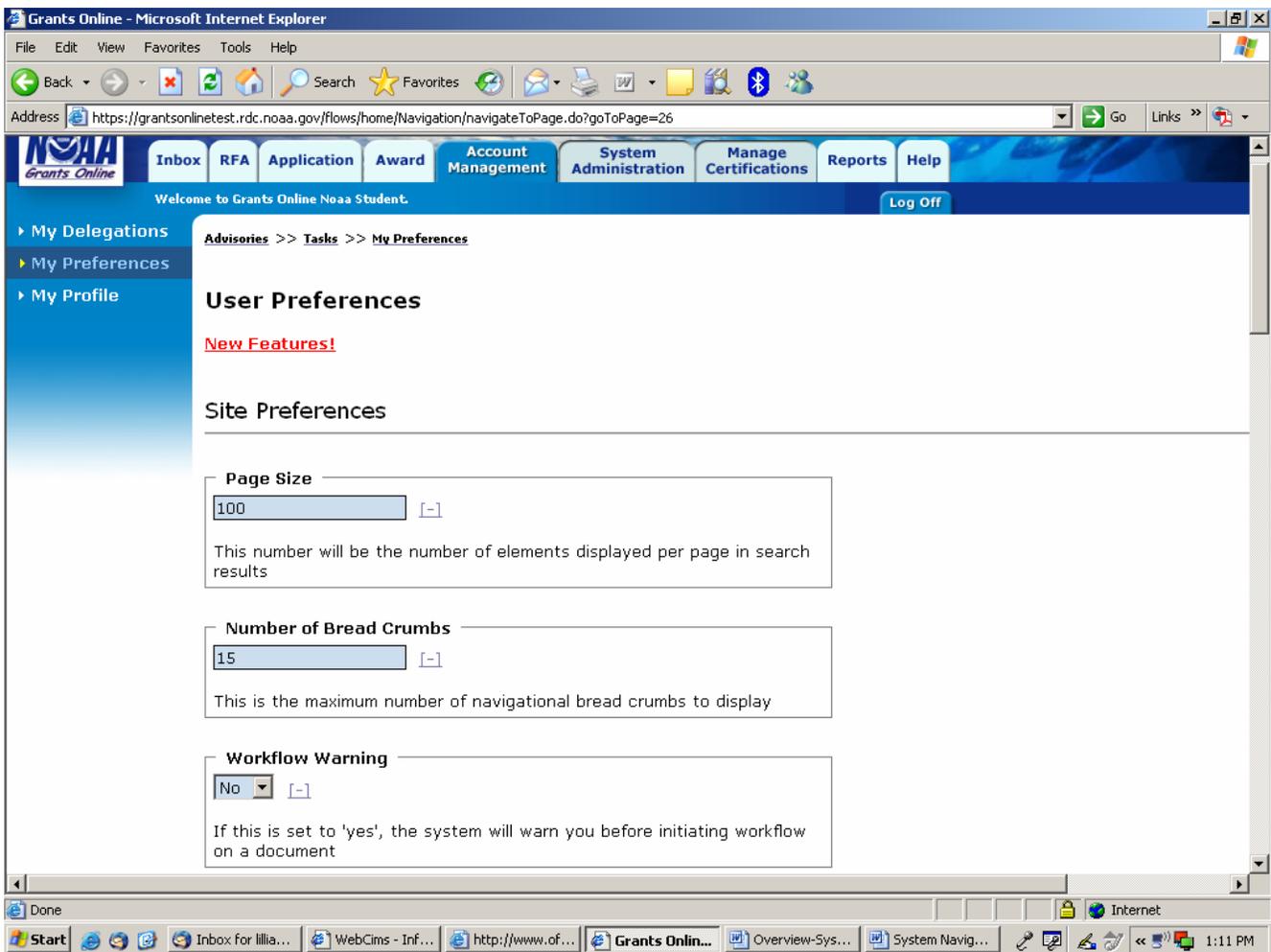
Role	Org ID	Organization
Recipient Authorized Representative	2001661	Institute for Congressionally Mandated Research

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.

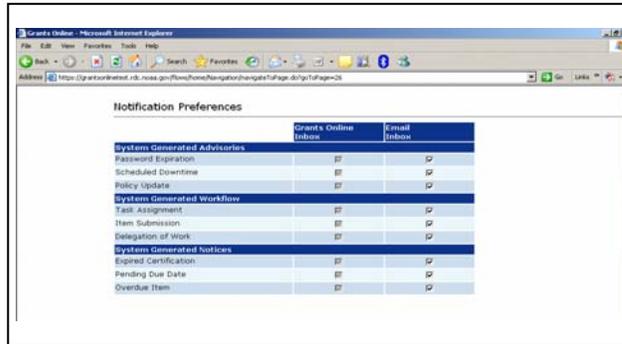
Accessing My Preferences

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.



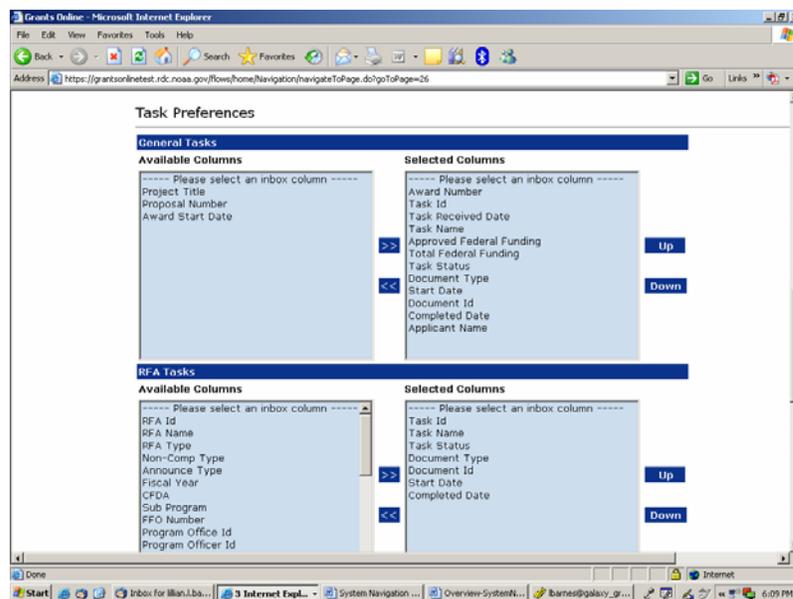
Customizing Notifications

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

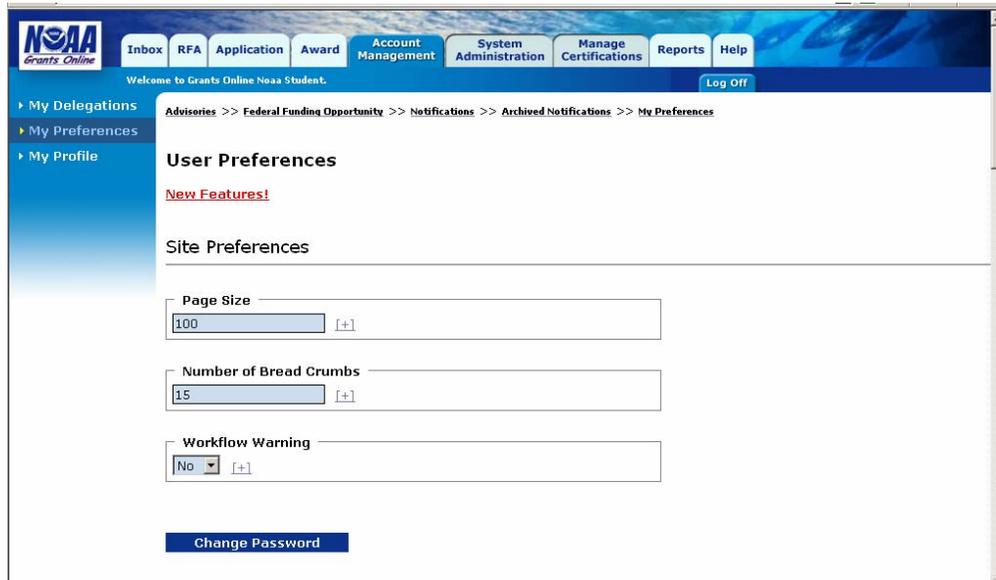
4. Select desired type of Notification to enable/disable
5. “Push” and “Pull” task columns to select the desired columns for display in *Your Inbox*.
6. Use “Up” and “Down” buttons to select the desired column order for display in *Your Inbox*.
7. Click **Save** at the bottom of the page.



Grantee Grants Online Training Manual

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**



Note: 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
2. Click **Find Peers**
3. Select delegations
4. Click **Delegate**

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

NOAA Grants Online

Welcome to Grants Online Solomon King

Log Off

My Profile
My Preferences
My Delegations

Delegate Authority

Current Peers on delegation List:

Action	Prefix	Affix	Name	Phone	Email	Fax	Title	Organization
Rescind	Mr.		Charles Peterson	301-713-0105	charles.peterson@noaa.gov			SOUTH EAST

Search for Peers
Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.

First Name:

Last Name:

Organization:

Role:
Awardee
Budget Officer
CAMS Finance Representative

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 .

Select	User Name
Select	Solomon King



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.

OPERATING AS DELEGATE FOR SOLOMON KING

Award Tab

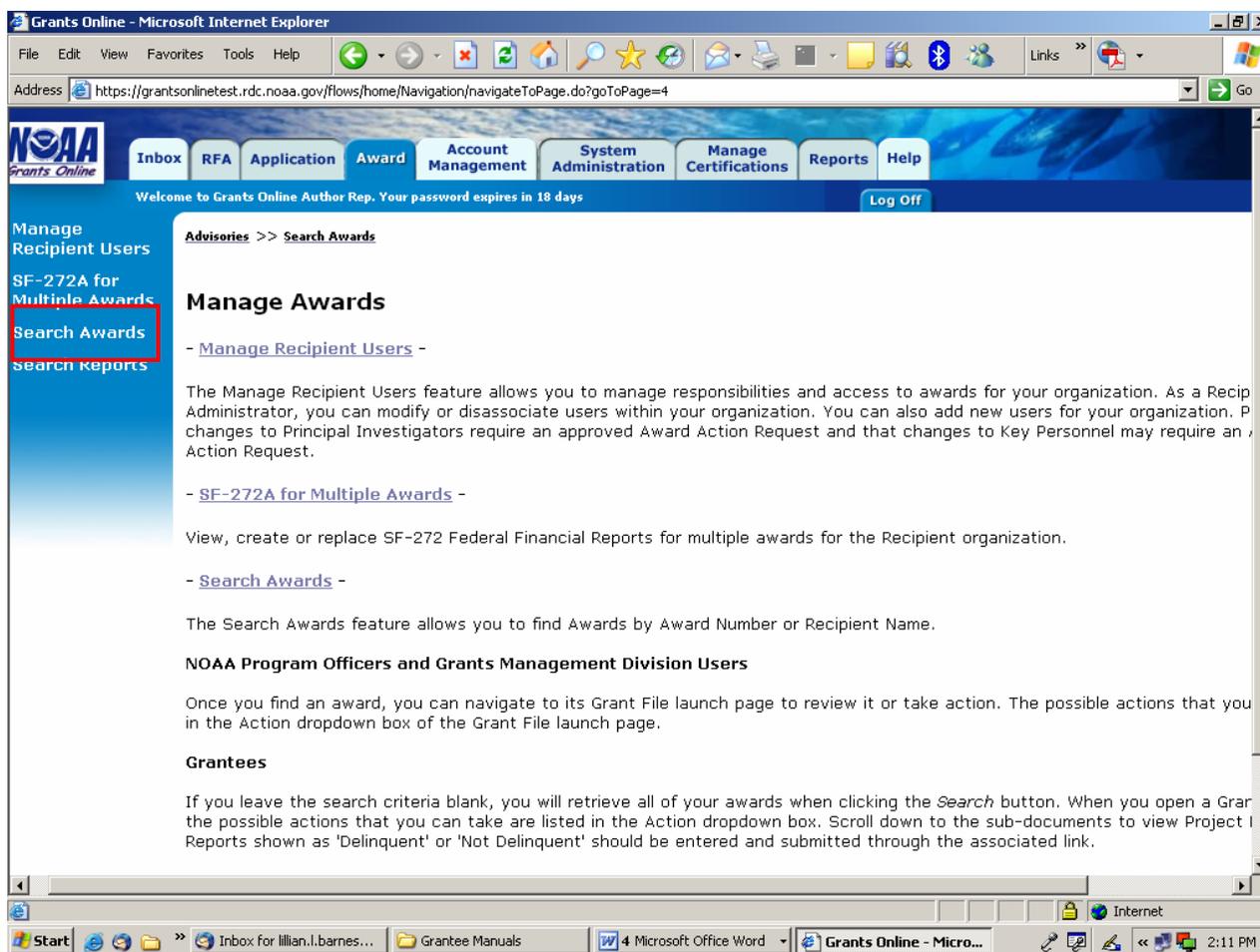
This section will provide you with a step-by-step process on how to search for an Award that has been signed by a Grants Officer. (Awards in Process are not viewable by Recipients.)

Please refer to Grantees Quick Reference Guide or the following Grantee Training Manuals for additional guidance on Award Tab functions:

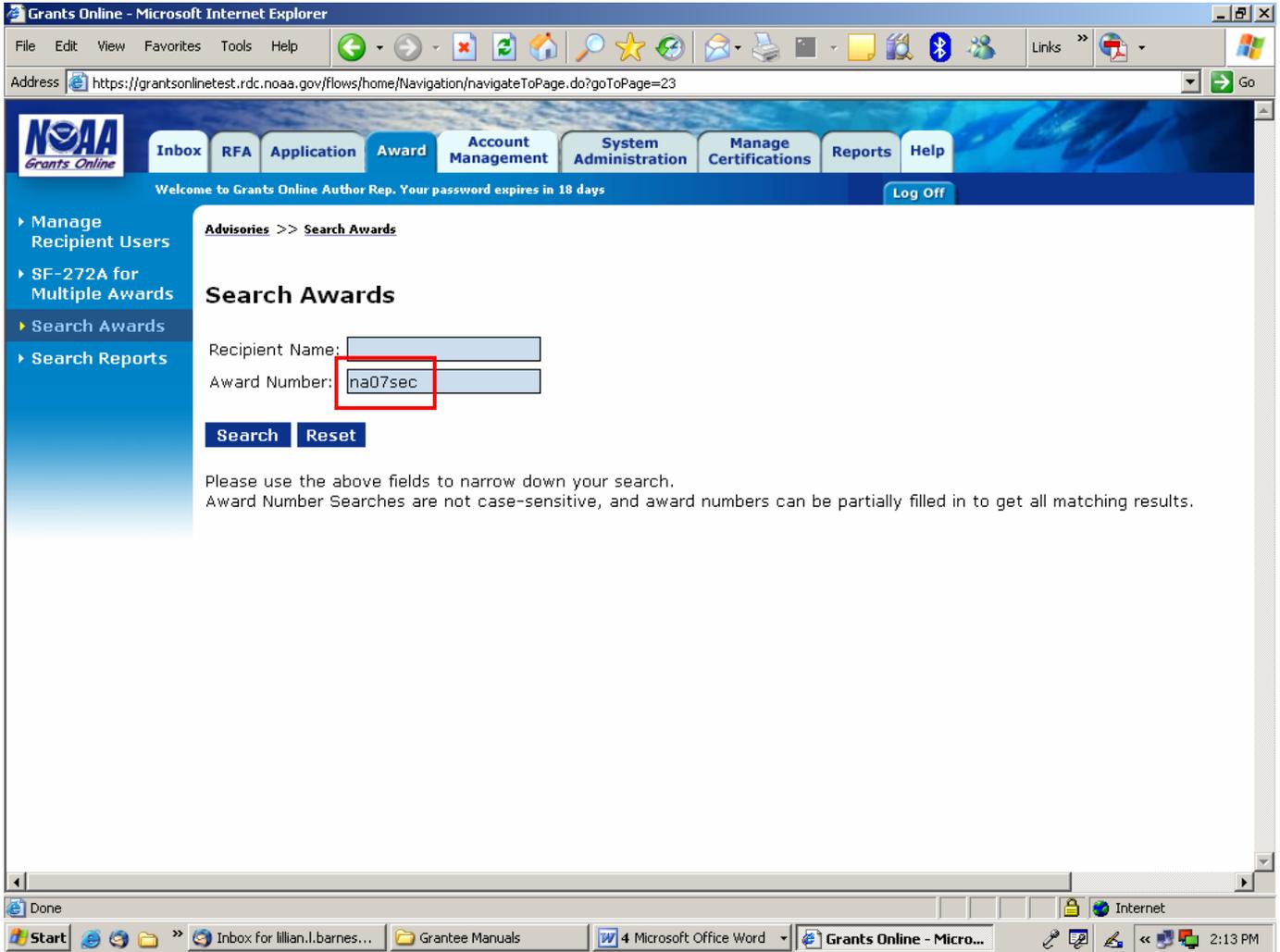
1. Accepting Awards and Managing Recipient Users
2. Performance Progress Reports
3. Federal Financial Reports
4. Award Action Requests

Searching for an Award

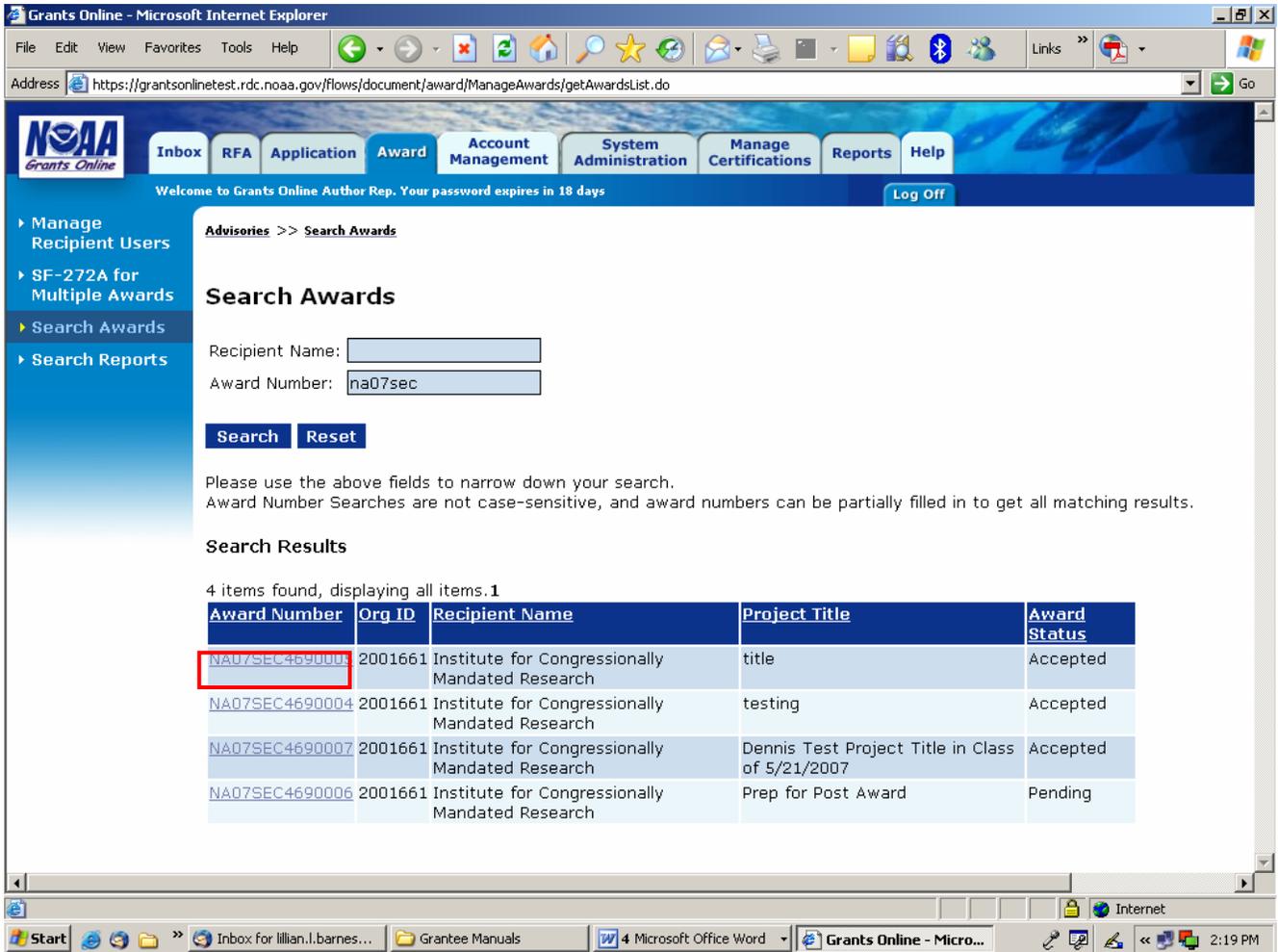
1. Once you have logged in to Grants Online, click on the Award tab
2. Click on the **Search Awards** option to search for an existing award



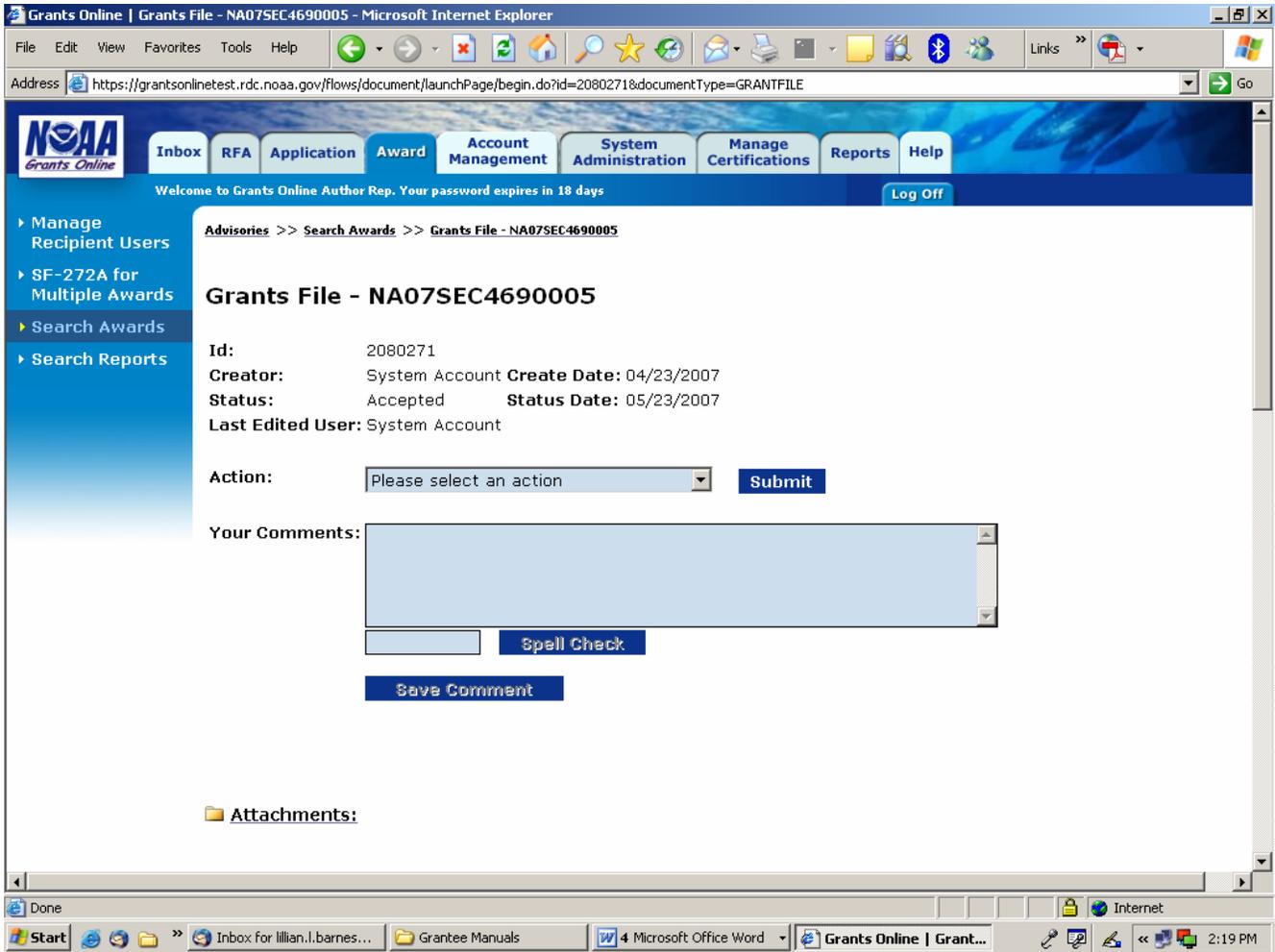
3. Enter search criteria if desired. **Leave blank to display all awards to which you have access.**
4. Click **Search**



- 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.



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



Grants Online | Grants File - NA075EC4690005 - Microsoft Internet Explorer

Address: https://grantsonlinetest.rdc.noaa.gov/flows/document/launchPage/begin.do?id=2080271&documentType=GRANTFILE

Attachments:

Grant Information

CFDA Number: 11.469	Award Period: 10/01/2006 - 09/30/2007	Program Office: USEC One NOAA Program Office (ONPO)
Program Officer: Noaa Student	Program Officer Phone: (202) 555-1212	Program Officer Email: testemail@atlas.rdc.noaa.gov
Total Federal Funding: \$1,000.00	Total Non Federal Funding: \$0.00	Multi-Year: No
Organization Name: Institute for Congressionally Mandated Research	Electronic Recipient: Yes	ASAP Recipient: Yes
Progress Report Frequency: Semi-Annually	SF-272 Frequency: Semi-Annually	SF-269 Frequency: Comprehensive - a final interim report is not required
Final Reports Due On: 12/29/2007	Closeout Date: N/A	
Project Title: title		

Sub Documents

Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date
Award Package	2080537	Dennis Test Project Title in Class of 5/21/2007	System Account	05/23/2007	System Account	Accepted	05/24/2007
Award File 0	2080533	Dennis Test Project Title in Class of 5/21/2007	System Account	05/21/2007	System Account	Accepted	05/21/2007

Export options: [Excel](#)

Associated Documents

Nothing found to display.

Financial Reports

Type	ID	Period Start	Period End	Due Date	Status	Amount Requested
SF-272: Federal Cash Transactions Report	2083352	10/01/2006	03/31/2007	04/30/2007	Accepted	N/A

Export options: [Excel](#)

Progress Reports

Type	ID	Period Start	Period End	Due Date	Status
Performance Progress Report	2082194	10/01/2006	03/31/2007	04/30/2007	Accepted

Export options: [Excel](#)

Done

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