Federal Program Officer (FPO)

User Manual

System Navigation

NOAA Grants Online Program Management Office

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Version 4.17

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Overview

This document provides step-by-step instructions that facilitate the Federal Program Officer's (FPO) navigation of the Grants Online system.

Accessing Grants Online

1. Type https://grantsonline.rdc.noaa.gov in the address bar of your browser to launch the Grants Online home page.

2. Before logging into Grants Online, the user can access the public search feature, the Grants Online training page, and other useful links from this screen.

WARNING!

If the user enters his/her username or password incorrectly, s/he will see a red error message on the screen. After three unsuccessful attempts to log in, the system locks the user out of his/her account. The user must click the "**Forgot your password?**" link and provide the correct responses to his/her security questions. If the issue is "**Forgot your username?**" click that link to obtain the Help Desk phone number.

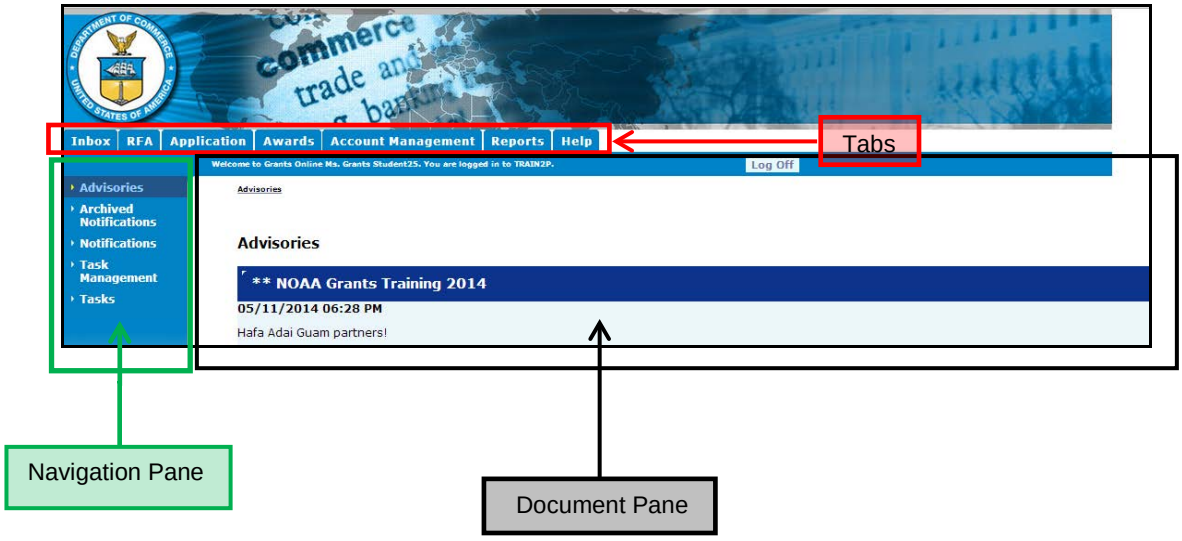
Grants Online Navigation Features

Access to most Grants Online features is determined by the user's role. Each registered user is given a role and level of access sufficient to accomplish his/her assigned tasks.

Screen Layout

When the user has successfully signed into Grants Online, the system will default to the Inbox Tab. Grants Online is divided into several content areas:

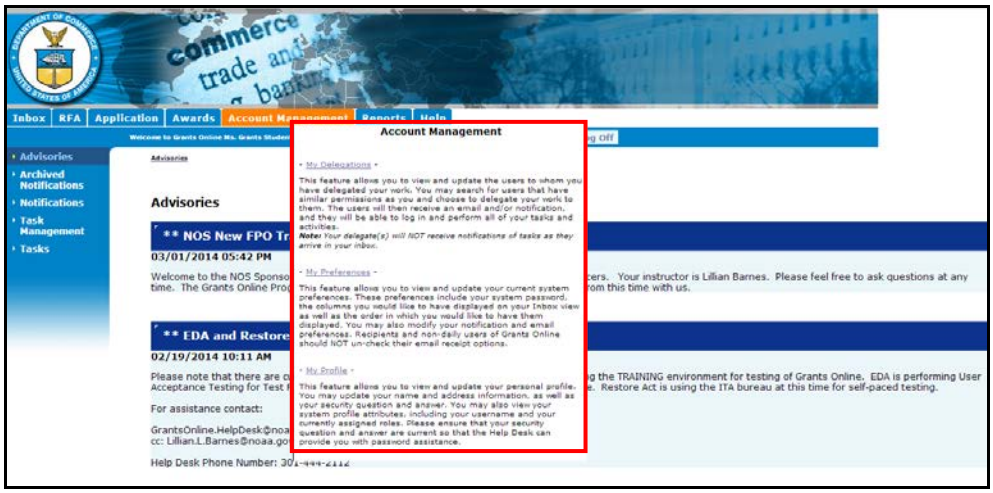
- **Tabs**: Highlighted by a red border at the top of the screen. Use the tabs to navigate to the different areas of Grants Online.
- **Navigation Pane**: Highlighted by a green border on the left-hand side of the screen. The options displayed in the navigation pane are determined by the active tab. Click on the desired link to go to that content area of Grants Online.
- **Document Pane**: Highlighted by a black border located in the middle of the screen. This is where most of the Grants Online details and information are displayed.



User Interface Features

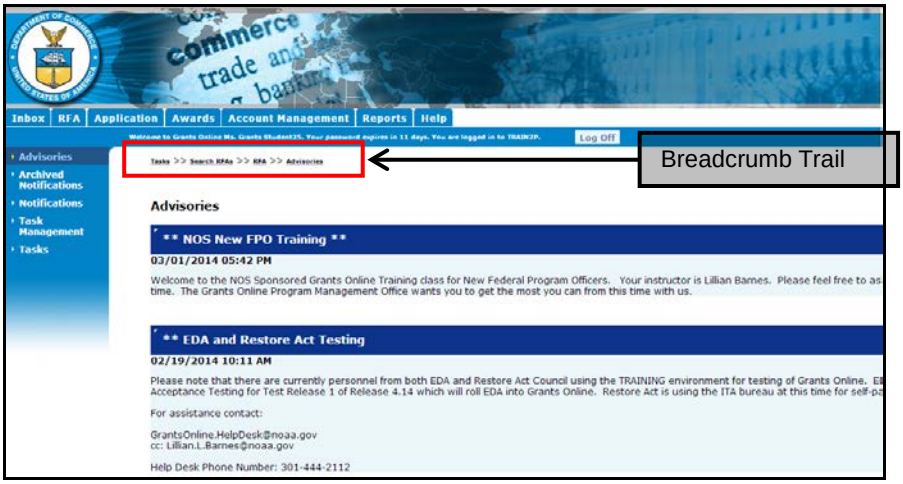
Pop-Up Short Cuts

When the user places the cursor over a tab at the top of the screen, s/he will see a pop-up menu that contains the same links as the left navigation pane for that tab. This allows the user to navigate directly to a content area without first having to click the tab.



Breadcrumbs

The Grants Online system keeps track of the pages the user has visited since s/he last signed on. The software puts a "breadcrumb trail" of those pages at the top of the document pane. This feature should be used instead of the browser's "Back" button.

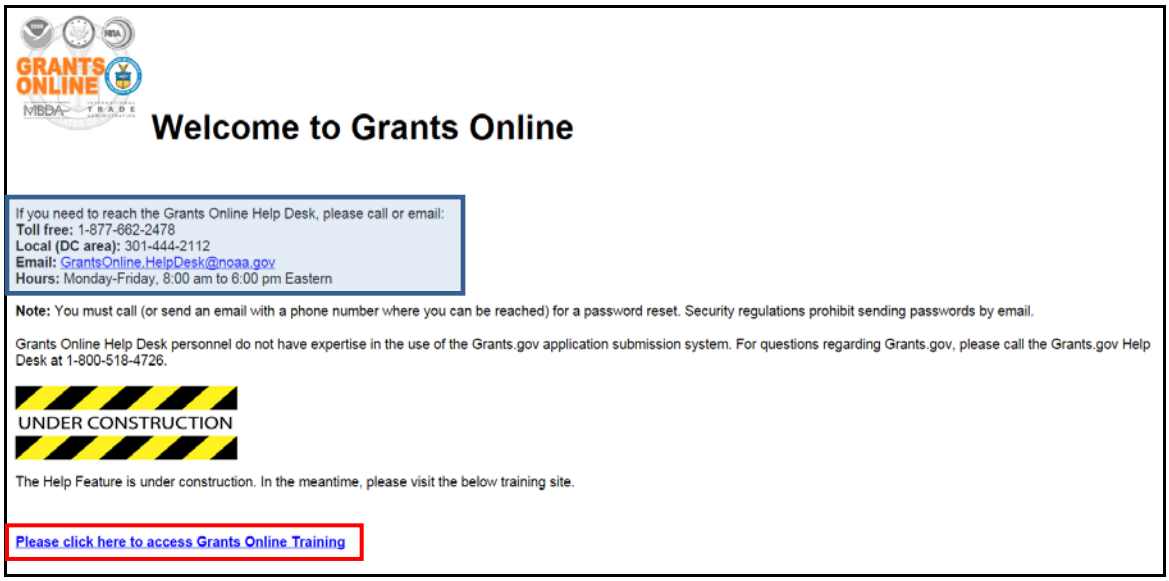


WARNING!

Please **DO NOT** use the browser's "Back" button in Grants Online. Using the browser's "Back" button may sign you out of Grants Online.

Help Tab

When the user clicks the Help Tab, the following screen will display. The Help Desk contact information and hours of availability are displayed in the blue shaded box. To access the Grants Online training, click the **Please click here to access Grants Online Training** link at the bottom of the screen.



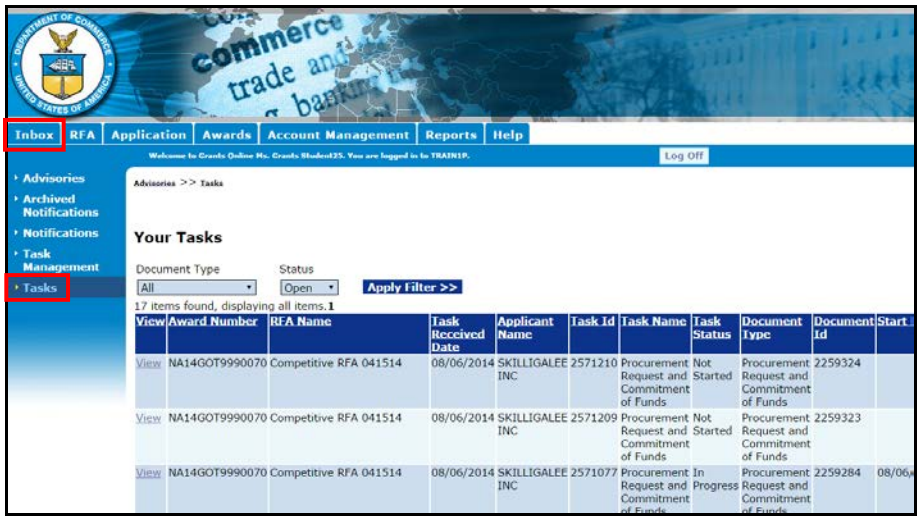
Inbox Tab

Tasks

Email notifications alert the user to an action or task s/he must complete. When the user selects a task, s/he has the opportunity to complete the action that has been assigned to him/her within the workflow.

Access a Task

1. From the Inbox Tab, click the **Tasks** link. A list of the user's available tasks is displayed.



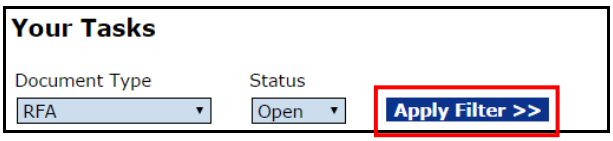
NOTE: To customize the look and feel of Grants Online, use the Account Management Tab. Details associated with the Account Management Tab are covered later in this document.

View a Task

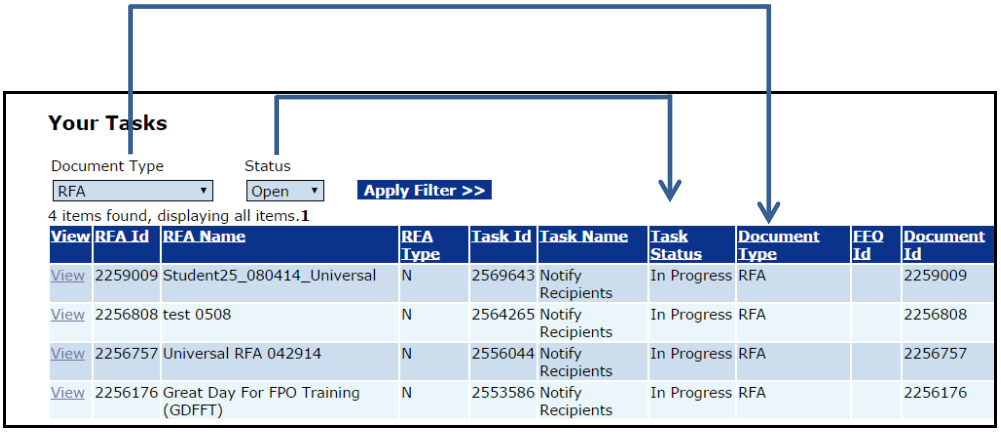
1. Click the **View** link next to the task you wish to view.

Filter a Task

1. Select the Document Type from the dropdown list.
2. Specify the Status from the dropdown list.
3. Click the **Apply Filter** button.



4. The **Your Tasks** screen shows only the filtered tasks. In this example, only the Open (In Progress) RFAs are visible.

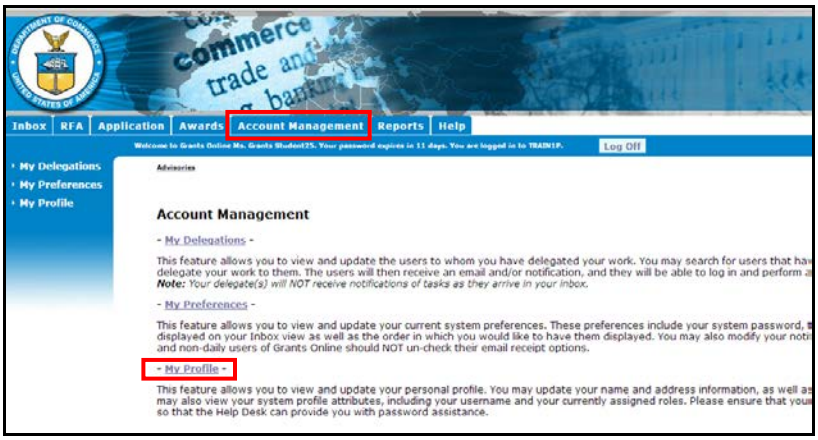


Account Management Tab

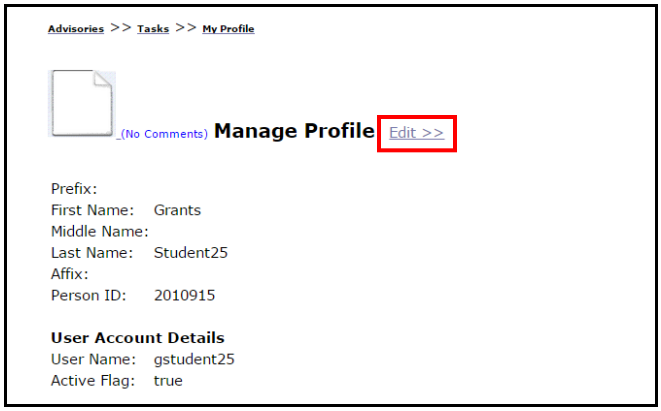
The Account Management Tab allows the user to view and update his/her profile; customize his/her notifications and task preferences; and delegate his/her Inbox to other users.

Manage the User Profile

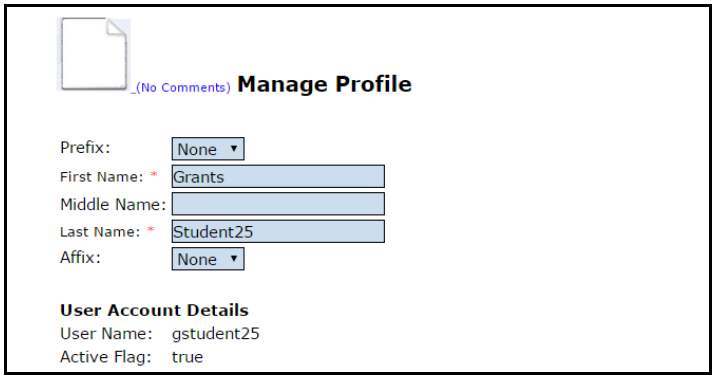
1. On the Account Management Tab, click the **My Profile** link.



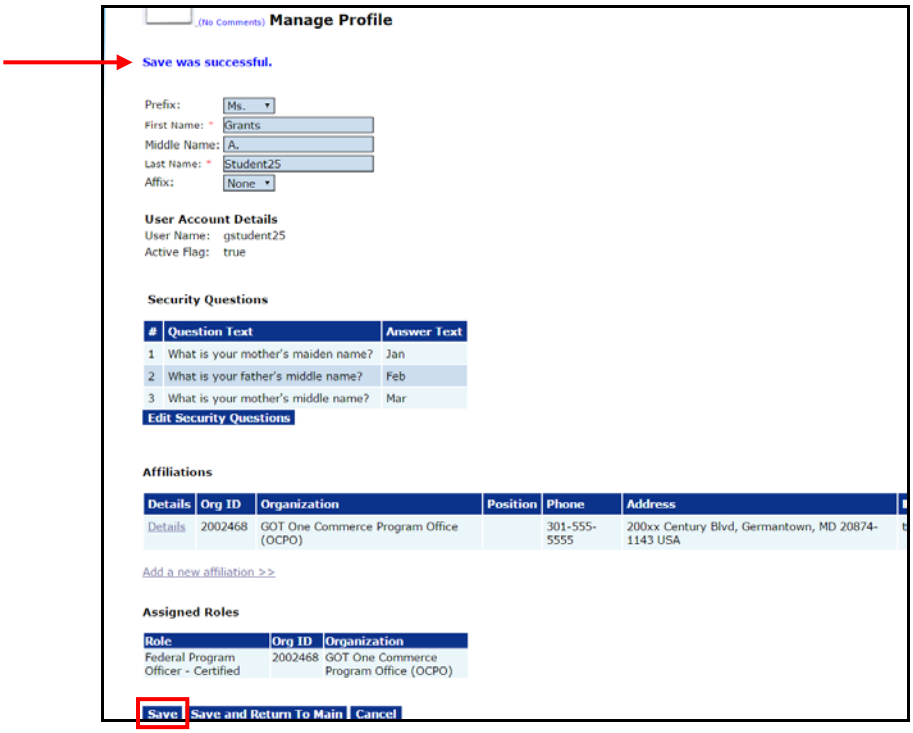
2. The Manage Profile screen is visible. Click the **Edit** link.



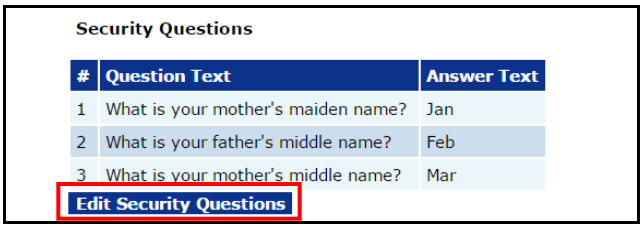
3. The user is presented with a screen on which s/he can modify his/her identifying account information. The variables First Name* and Last Name* are mandatory data entry fields.



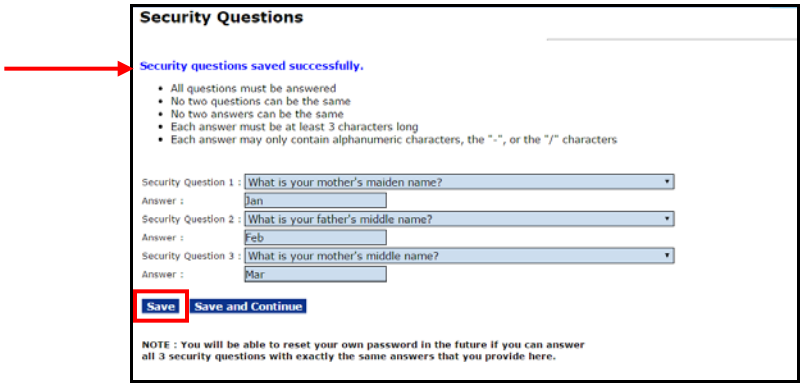
4. Scroll to the bottom of the screen and click the **Save** button. An indicator that data was saved is accompanied by the message "**Save was Successful"** and is displayed at the top left-hand corner of the screen. Although not required, it is strongly suggested that the user click the **Save** button after each modification.



5. The Security Questions section displays the current questions and corresponding answers. Initially, when a user logs into Grants Online s/he must specify this information. To change or update the questions, click the **Edit Security Questions** button.

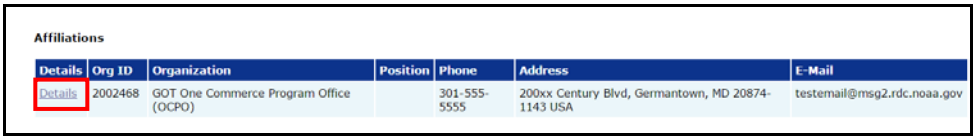


6. From the screen displayed below, the user can modify his/her questions and answers. Click the **Save button** and updates are confirmed with the message "**Security questions saved successfully."** Subsequently, the user must click the **Save and Continue** button. If the user opts to just click the **Save and Continue** button, changes are saved but the message does not display.

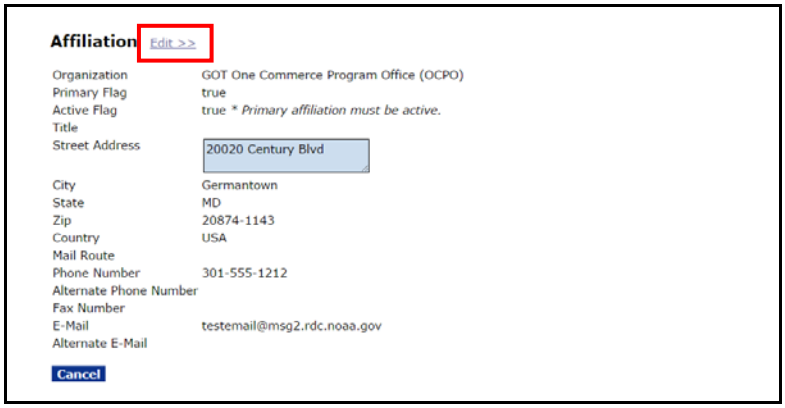


7. To reset his/her password, the user must provide the correct responses to all security questions. If the user contacts the Help Desk for assistance with a password reset, s/he must provide an accurate response to <u>all</u> security questions. This assures the Help Desk that the user has the right to access the Grants Online account.

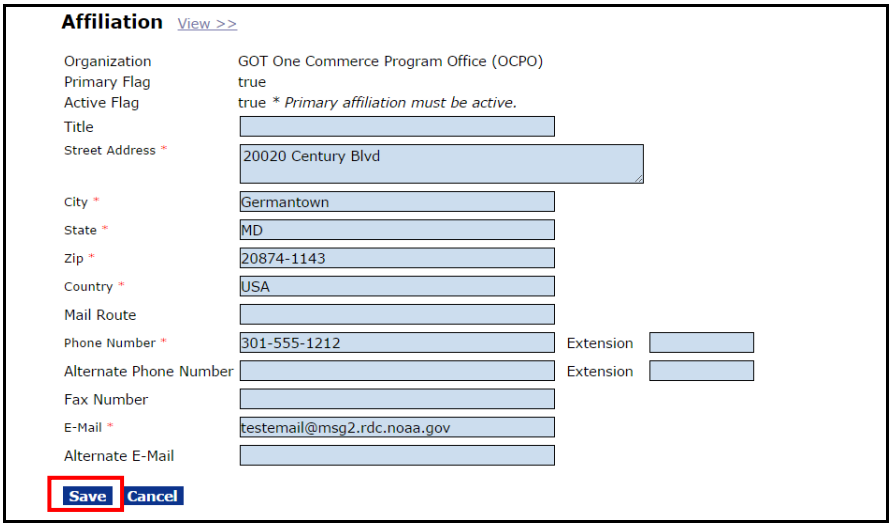
8. To update his/her affiliations, the user should click the **Details** link under the Affiliations header.



9. When the screen shown below displays, click the **Edit** link.



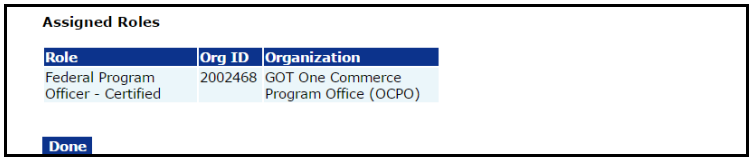
10. As per convention, the data fields with a red asterisk require data. Make the necessary changes and click the **Save** button. If the user opts to click the **Cancel** button, changes are not saved.



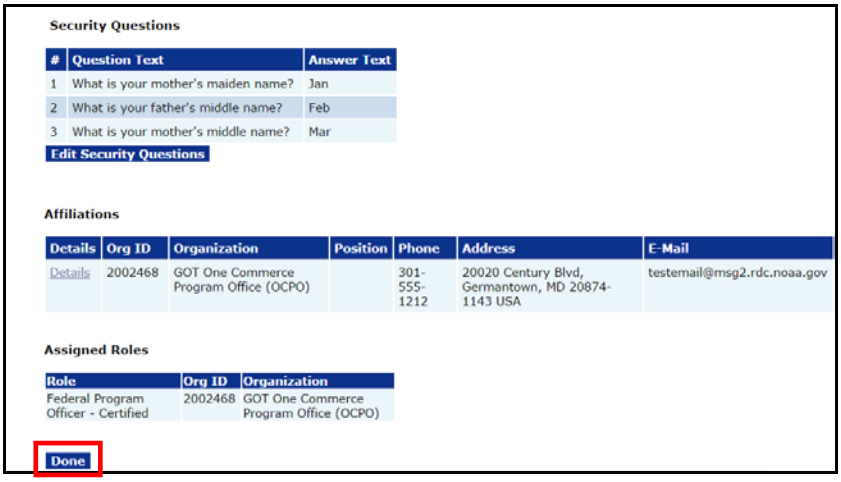
NOTE: If a NOAA user wishes to change his/her Organization, s/he must contact his/her Grants Management Advisory Council (GMAC) representative. That person will contact the Help Desk on behalf of the user.

Users from other bureaus should contact the appropriate person in their organization to modify this information.

11. The final section on the Manage Profile screen cannot be modified without the involvement of GMAC and the Grants Online Help Desk.



12. Click the **Done** button to finalize the process and return to the main Account Management screen.

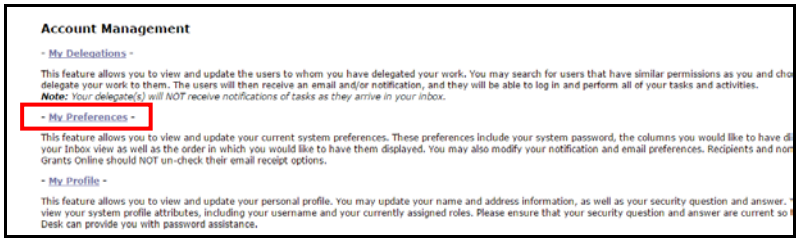


User Preferences

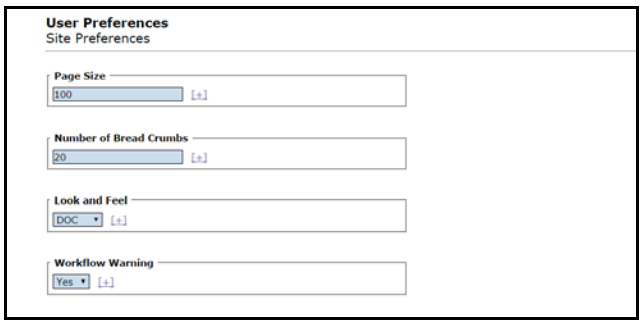
The user may customize his/her viewing preferences using the My Preferences link. The user may add/remove email Inbox notifications. This will remove notifications sent to the user's external email account only. Headings may be customized to display certain fields on the user's tasks and notifications screens. Additionally, the user may change his/her Grants Online password.

Access User Preferences

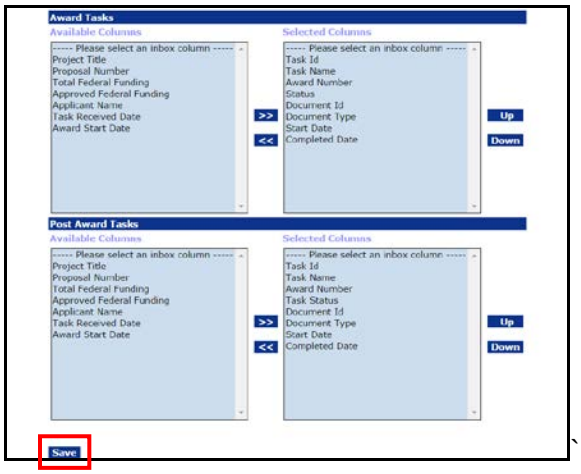
1. From the Account Management Tab, click the **My Preferences** link.



2. On the screen shown below, the user can customize the page size, number of breadcrumbs, the look and feel, and the workflow warning.



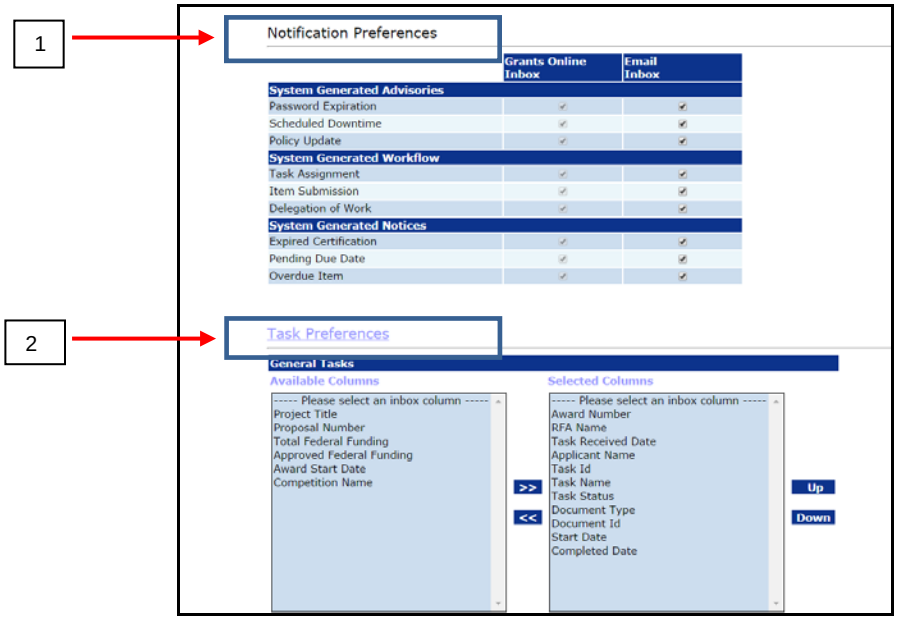
3. Scroll to the bottom of the screen and click the **Save** button to capture the changes.



Customize Tasks

1. The user can modify his/her notifications using the checkboxes in the Email Inbox column (under the **Notification Preferences** section – top potion of the image below). Any modifications only impact the user's Email Inbox; the Grants Online Inbox specifications cannot be modified.

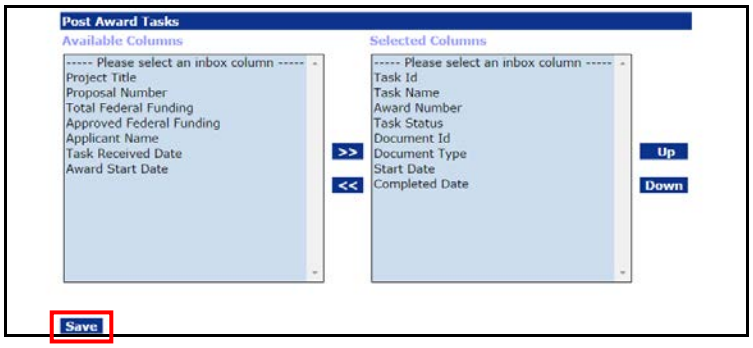
2. The user can modify the type and order of preferences that display on the screen. To make modifications, click the **Tasks Preferences** link (bottom portion of the image below**).** The user can modify his/her preferences for General Tasks, RFA Tasks, Award Tasks, and Post Award Tasks.



3. For the **Task Preferences**, use the Push **[>>]** and Pull **[<<]** functionality to specify the columns that will display on the Tasks portion of the screen.

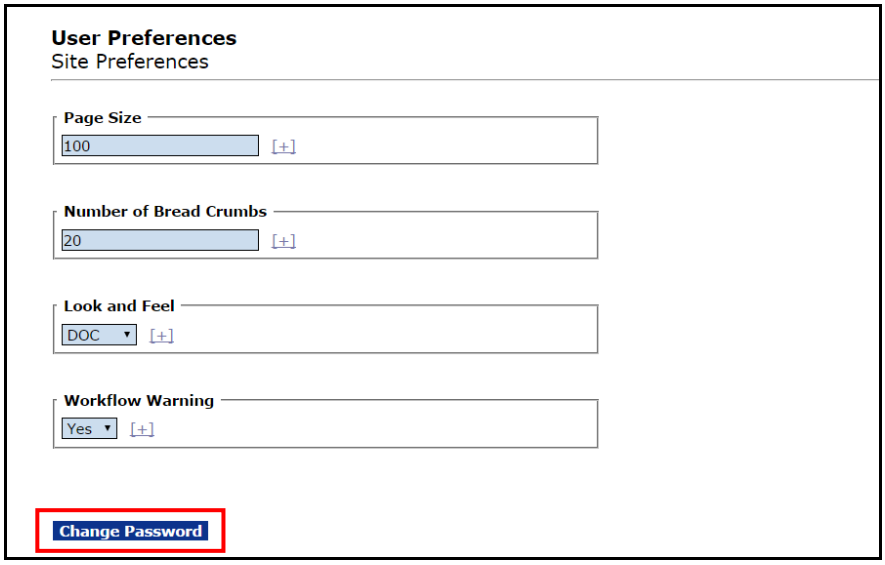
4. For the **Task Preferences**, use the Up or Down buttons to select the column order that should display on the Tasks portion of the screen.

5. Click the **Save** button at the bottom of the screen. The user has to scroll to the bottom of the screen to see the **Save** button.



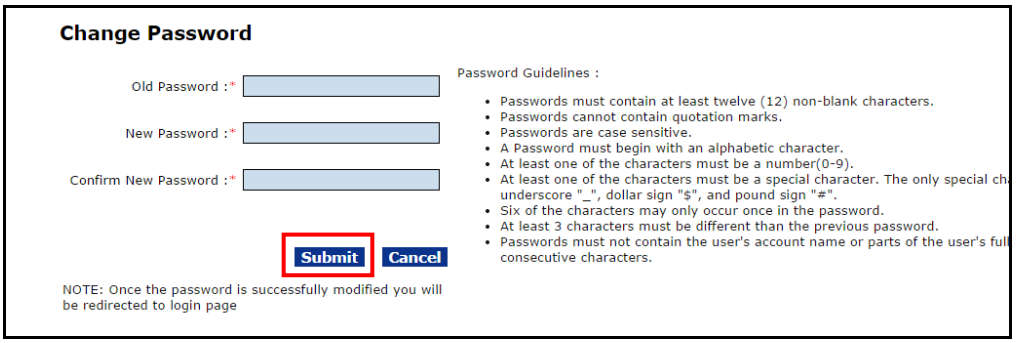
Change the Password

1. Click the **Change Password** button on the User Preferences screen.



2. When the change Password screen is visible, specify data for mandatory data fields – indicated by a red asterisk (*).
    - Enter the old password*.
    - Enter the new password*.
    - Enter the new password again to confirm*.

3. Click the **Submit** button.



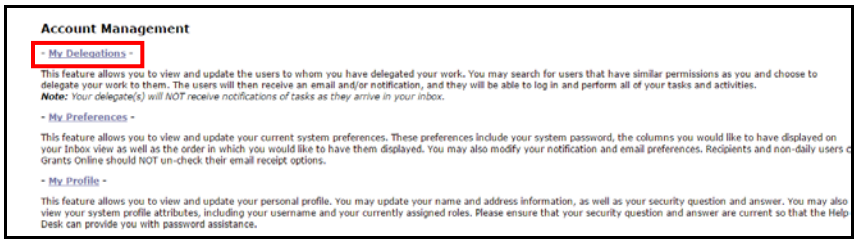
NOTE: Follow the Password Guidelines as detailed on the upper right-hand side of the screen. **ONLY** the following special characters are valid: underscore "_", dollar sign "$", and pound sign "#".

User Delegations

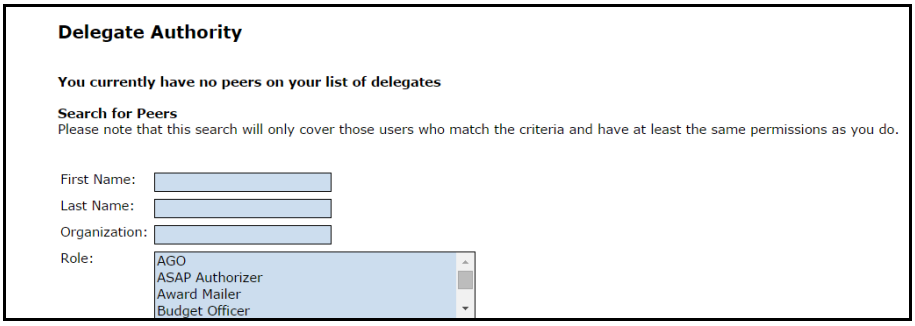
When the user selects the **My Delegations** link on the Account Management Tab, s/he will be able to view existing delegates, add delegates, and rescind delegates. A user can only select as a delegate a person with an access level that matches his/hers. For example, a certified program officer cannot delegate to someone who has a lower level of access (e.g., an uncertified Program Officer or a Program Office staff member). In addition to an equivalent level of access, the delegate must have the same organizational affiliation as the delegator.

Access User Delegations

1. From the Account Management Tab, click the **My Delegations** link.



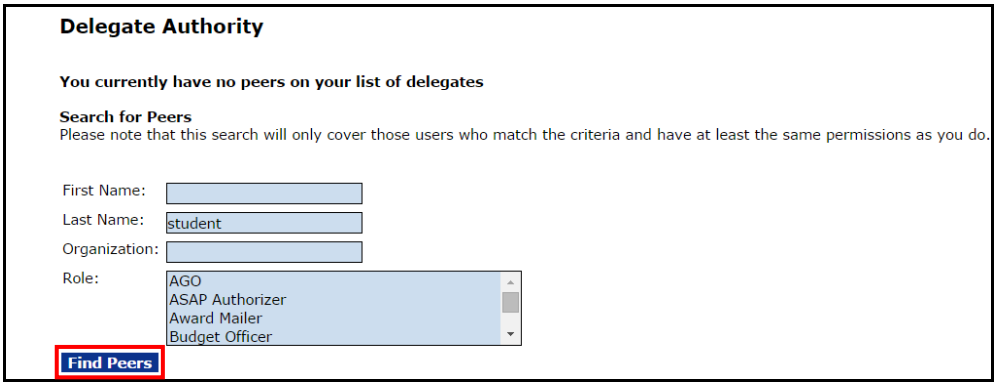
2. The Delegate Authority screen is visible.



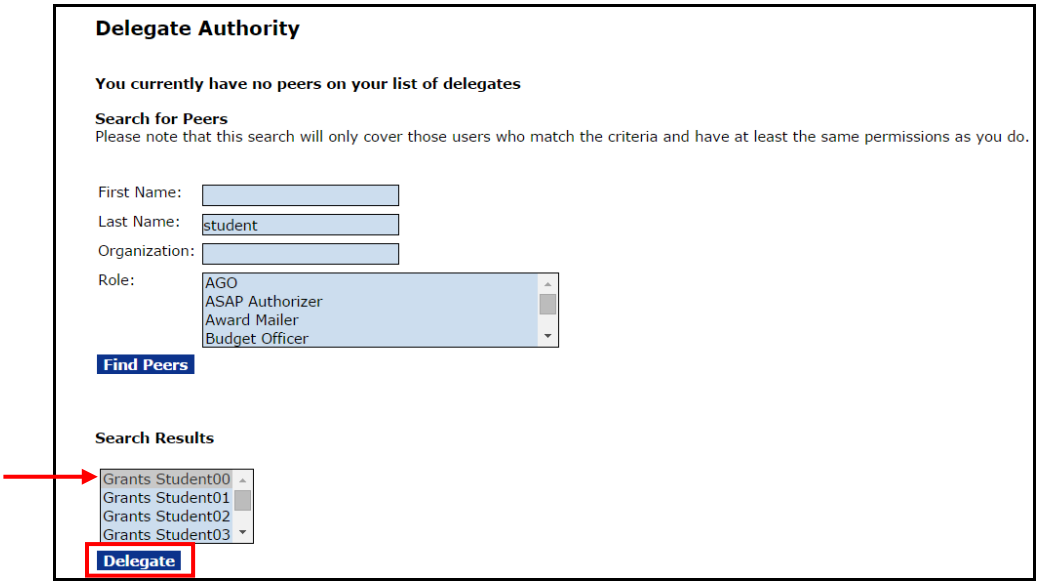
Add a Delegate

1. Search for the user(s) who will be chosen as a delegate using the first name, last name, organization or role.

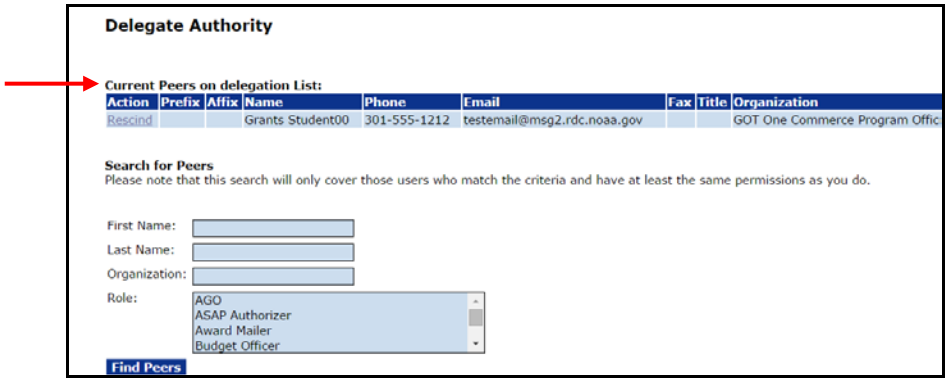
2. Click the **Find Peers** button.



3. When the search results are returned, choose the user you would like to assign as a delegate. Click the **Delegate** button.

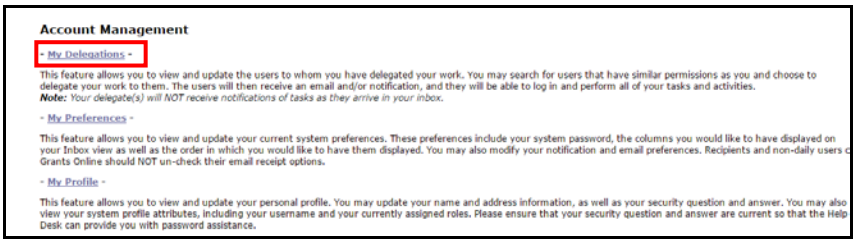


4. The screen shot below is visible when a person is successfully chosen as a delegate. To specify additional delegates, repeat steps 2-3 as many times as is necessary.



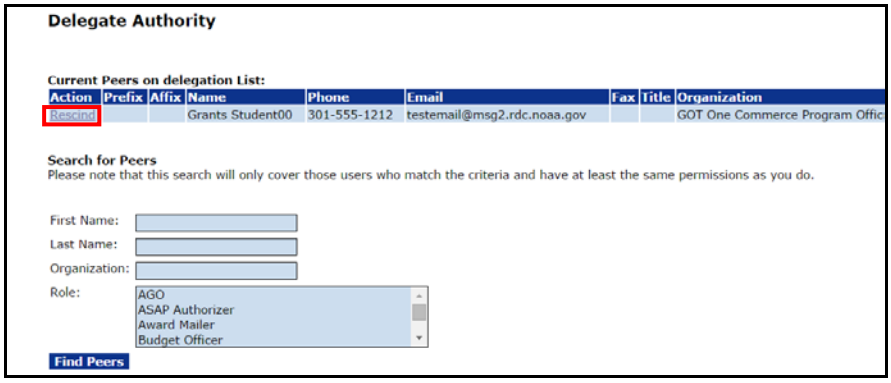
Rescind a Delegation

1. From the Account Management Tab, click the **My Delegations** link.



2. The Delegate Authority screen is visible. If the user has assigned one or more person(s) as a delegate, the **Current Peers on Delegation List** will display; otherwise, the user is only presented with the option to Search for Peers.

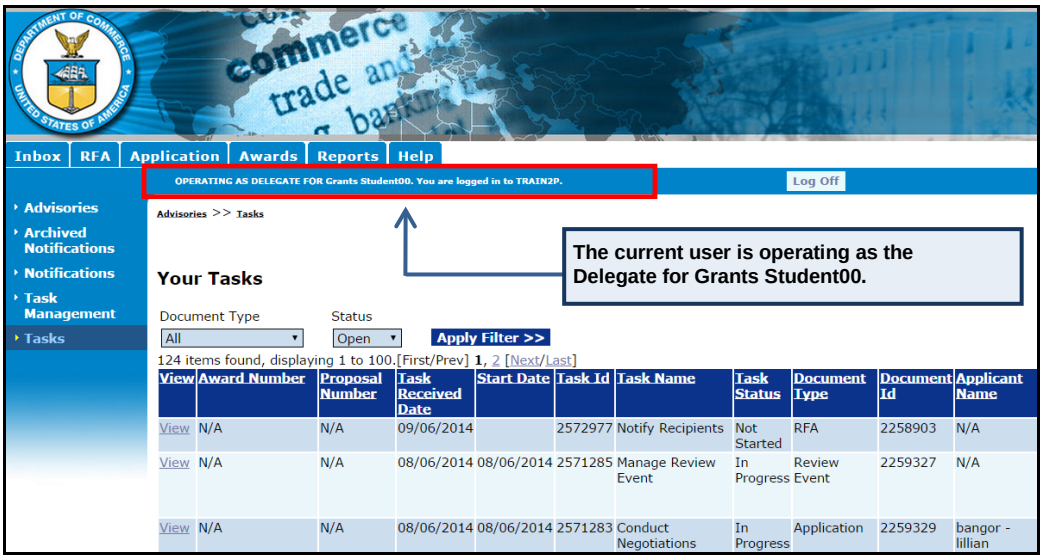
3. Click the **Rescind** link next to the name of the individual(s) you would like to remove as a delegate.



Log In As a Delegate

1. The user should log in to Grants Online with his/her normal user name.
2. Click the **OK** button on the Notice to Users page.
3. Choose to continue as yourself (click the **Continue to Inbox** link).

-or-

Access Grants Online as the person who assigned you authority to access his/her account (click the **Select** link next to the person's name).

NOTE: When a user is signed into Grants Online as a delegate, the system will identify him/her as a delegate of that individual (see below). The tasks displayed on the screen are the tasks the delegate may perform on behalf of the original user. Both the user and the delegate can work in Grants Online simultaneously.