Grantee Training Manual

Accepting Awards and Managing Recipient Users

Prepared by BearingPoint, Inc.

Version 2.6

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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 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.

Text Conventions

Text; Example	**What it means.**
Text in Bold; Click **Done**	Indicates a command.
Text in Italics; *CD450 Details* screen appears.	Indicates a screen.
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 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) 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 policies. 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 21st 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.

Grants Online allows Grantees to:

- Accept Awards electronically.
- Manage user roles for individuals within their organization.
- Submit post – Award action requests and Performance Progress Reports
- Correspond with your NOAA Program Officer and Grant Specialist.

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 in navigating and using the system appropriately. 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:

- Obtaining your Grants Online password
- Logging into Grants Online

Overview

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

Accessing Grants Online

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

Logging in to Grants Online

1. If you are not the Grants Online Recipient Administrator for your organization, please contact that person to obtain your username and password. If you don't know your Recipient Administrator or you have been designated as the Recipient Administrator for your organization, 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.**

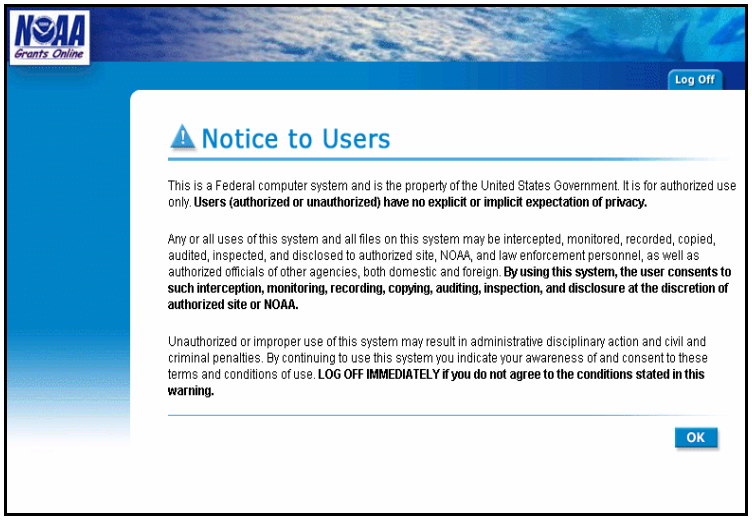
Warning! If you enter an incorrect username or password, you will receive an error message in red on the screen. After three unsuccessful attempts to log in, the system will lock you out. In such cases, you are required to contact your Recipient Administrator or the Grants Online Help Desk to unlock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

5. The *Notice to Users* screen appears

6. Review disclaimer information and click **OK**



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Accepting an Award

Overview In this section, you will learn how to accept an Award in Grants Online.

Module Objectives The Accepting Awards module will review the following objective:

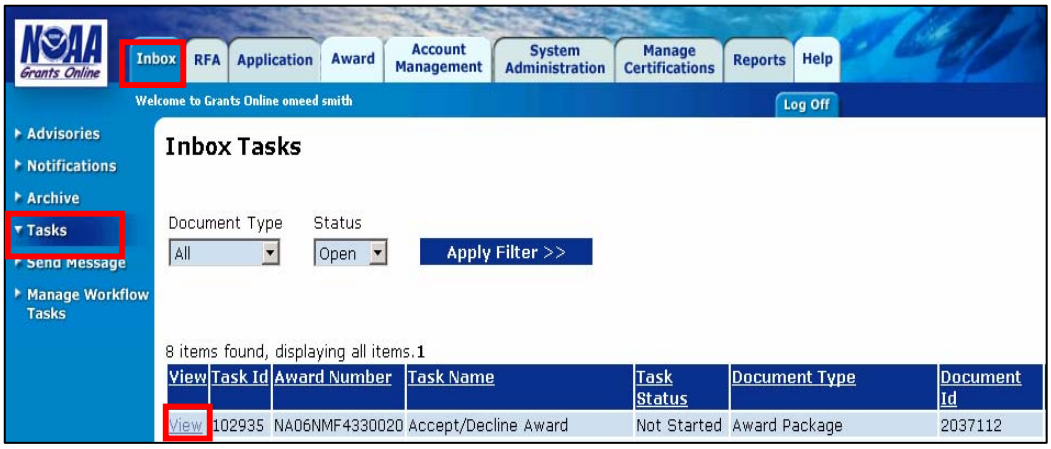
- Accepting an Award via the "Accept/Decline Award" task

Accepting Awards

For those organizations that are electronic recipients, the designated Recipient Authorized Representative will receive a task in their inbox entitled Accept/Decline Award." Contact the Grants Online Help Desk if you are not sure who the Recipient Authorized Representatives are for your organization.

Accept/Decline Award Task

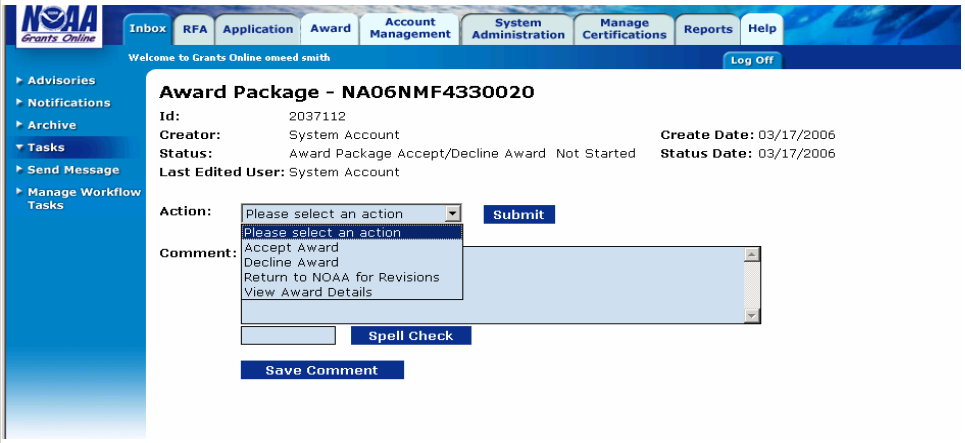
1. Click on the **Inbox** tab.
2. Select the **Tasks** link.
3. Select the **View** link next to the Accept/Decline Award task.



4. Select an option from the action dropdown. This module will review the workflow path for each action that is selected.
   - **Accept Award** – Select this action to accept the Award. By electronically signing, the Recipient agrees to comply with the Award provisions as well as provisions incorporated into the Award. If not electronically signed without modification by the Recipient within 30 days of receipt, the Grants Officer may unilaterally terminate this Award.
   - **Decline Award** – Select this action to decline an Award.
   - **Return to NOAA for Revisions –** Select this action to return the Award to NOAA for revisions. You are neither accepting nor declining the Award.
   - **View Award details** – Select this action to view the details of the Award so that you can verify that all of the information is correct before accepting the Award.

5. If you wish to enter any comments, enter and save them in the **Comment** box (underneath the action dropdown).
6. Once you have entered your comments (if any), select the appropriate action and click **Submit**.

Warning! These comments are viewable only by NOAA users once the comments have been saved and the action has been submitted. After comments are entered in the COMMENT field, the comments are saved by selecting the SAVE COMMENT button. To submit an action, select the action from the dropdown menu followed by the SUBMIT button.



Viewing Award Details

1. Upon selecting **View Award Details** action from the Accept/Decline task (see step 6 above), the next screen you will see (see step 2, page 9), displays the Award details. The Award details include the following:
    - Recipient Name
    - Street Address, City, State
    - CFDA Number
    - Project Title
    - Award Number
    - Federal Share of Cost
    - Recipient Share of Cost
    - Total Estimated Cost
    - Award Period
    - CD 450 Items
    - Grants Officer signature and date of signature
    - CD 50 Report

- SAC Report

2. Click on the **CD 450 Report** button or the **SAC Report** button to view the CD 450 report and the SAC report. The report will open as a .pdf file, which you can print and/or save.

Note: This document is locked because you cannot make any changes to the Award details. You may only view the Award details as well as print and/or save the CD 450 report and the SAC report.

Application Header Information

CFDA Number:	11.433	**RFA Document ID:**	2020646
Program Office:	Fisheries Southeast Region Program Office (SE)	**RFA Document Title:**	Grantee Training
Application ID:	2037097	**Project Title:**	test fahma 3/17 2
Applicant:	University of Chicago	**Fiscal Year:**	2006
Award Number:	NA06NMF4330020		

THIS DOCUMENT IS LOCKED

Financial Assistance Award

The system has calculated values for the Federal and Non-Federal shares of funding based on existing CD-435s and negotiated funding amounts. Grants Online users may optionally Override these calculations via the Override checkbox below. Once checked, the values that are entered will be saved and available on the CD-450 report. Please note that when the Grants Officer signs, the system will automatically Override and store the currently populated funding fields.

Recipient Name:	University of Chicago			**Federal Share of Cost:**	$100000.00 Override ☑
Street Address:	1786 Derbenshire drive			**Recipient Share of Cost:**	$0.00
City, State, Zip:	Chicago , IL 60637	**Project Title:**	test fahma 3/17 2	**Total Estimated Cost:**	$100000.00
CFDA Number:	11.433	**Award**	NA06NMF4330020	**Award Period:**	04/01/2006 - 04/01/2007

CD-450 Items

☐ Department Of Commerce Financial Assistance Standard Terms and Conditions	Required
☐ NOAA Special Award Conditions	Required
☐ Line Item Budget (Attach File)	Required
☐ 15 CFR Part 14, Uniform Administrative Requirements for Grants and Agreements with Institutions of Higher Education, Hospitals, Other Nonprofit, and Commercial Organizations	Required
☐ 15 CFR Part 24, Uniform Administrative Requirements for Grants and Agreements to State and Local Governments	
☐ OMB Circular A-21, Cost Principles for Educational Institutions	Required
☐ OMB Circular A-87, Cost Principles for State, Local, and Indian Tribal Governments	
☐ OMB Circular A-122, Cost Principles for Nonprofit Organizations	
☐ 48 CFR Part 31, Contract Cost Principles and Procedures	
☐ OMB Circular A-133, Audits of States, Local Governments, and Nonprofit Organizations	Required
☐ Other(s)	Required

There are no attachments on this Grants File

Grants Officer: Lamar Revis Signature Date: 03/17/2006

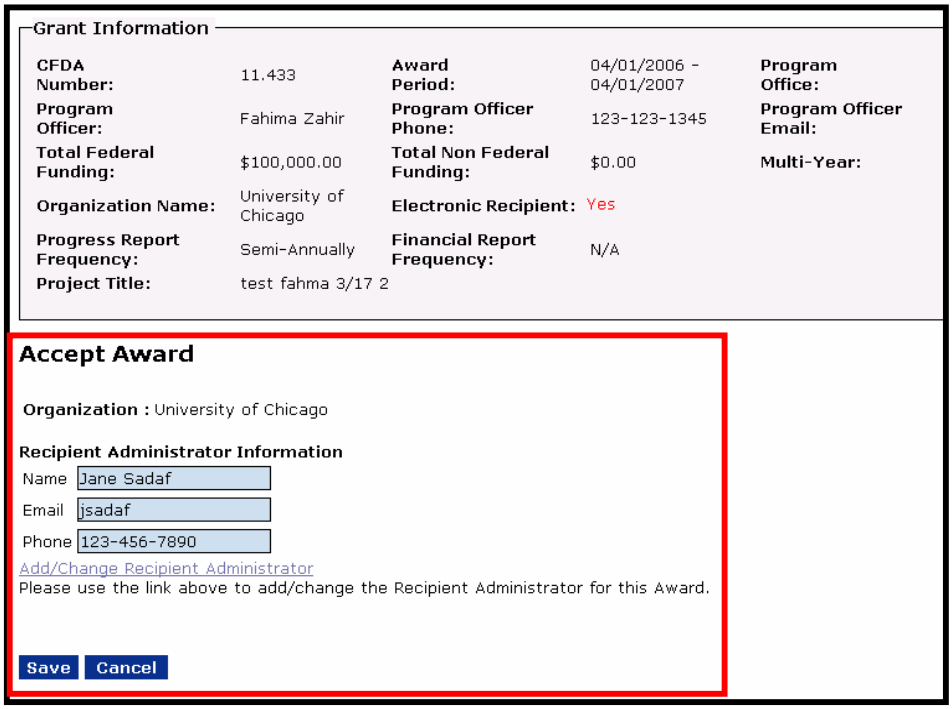
This award approved by the NOAA Grants Officer constitutes an obligation of Federal funding. By electronically signing, the Recipie comply with the Award provisions checked on this document, as well as provisions incorporated into the Award. If not electronica modification by the Recipient within 30 days of receipt, the Grants Officer may unilaterally terminate this Award.

Cancel | CD450 Report | SAC Report

3. Once you have viewed the Award Details, CD 450 Report, and the SAC Report, select **Cancel** to return to the action drop down menu for the Accept/Decline Task (see step 6, page 8).

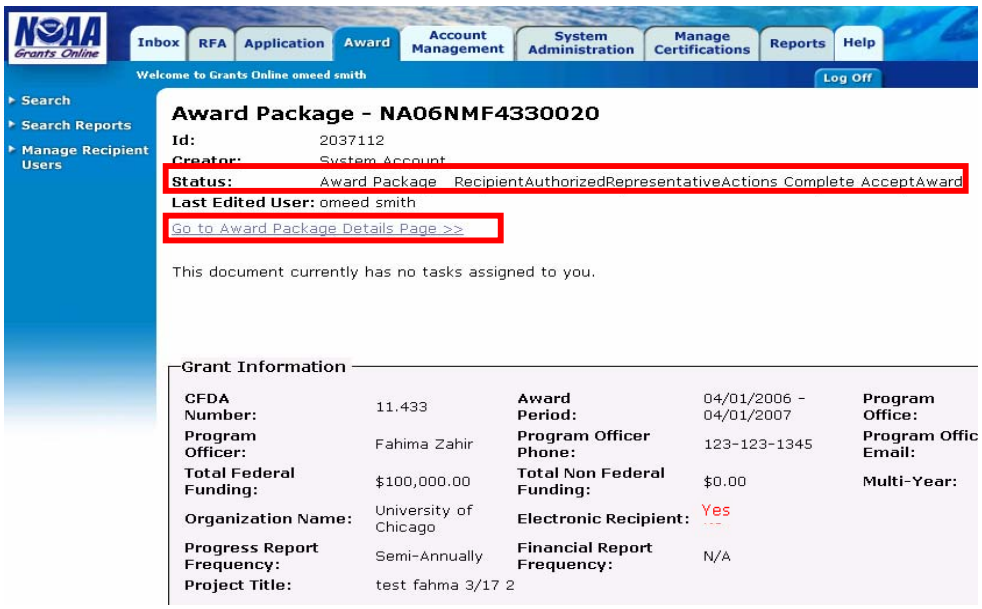
Accepting an Award

1. Upon selecting the **Accept Award** action from the Accept/Decline task (see step 6 page 8), the *Accept Award* screen displays your organization name and Recipient Administrator Information. You may change the Recipient Administrator that is listed by selecting the **Add/Change Recipient Administrator** link. After the Recipient Authorized Representative verifies the Recipient Administrator, a task entitled "Manage Recipient Users" is sent to the Recipient Administrator (see page 12). Select **Cancel** to return to the action drop down menu for the Accept/Decline Task (see step 6 page 8). Select **Save** to accept the Award.



2. The following screen is the *Award Package* screen. You may view the Award details by selecting the **Go to the Award Package details** link (See page 8). You may also select the **Amendment ID hyperlink** to view the Amendment details or the **Grants File ID hyperlink** to view the Grants file. Please note the Grants file contains all the Award files for the Award. Award file 0 is the original Award and the subsequent Award files such as Award file 1 and/or Award file 2 represents Amendments.
3. To view the current users and their roles within your organization for this Award, select the **Manage Award Recipient** link at the bottom of the screen. You may also view the accounting details by selecting the **Accounting Details** link also at the bottom of the page. The accounting details display the disbursement activity along with the total Award amount.

Note: The status of Amendment 0 now states the Recipient Authorized Representative has accepted the Award.



One item found. 1

Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date
Amendment 0	2037112	test fahma 3/17 2	System Account	03/17/2006	System Account	RecipientAuthorizedRepresentativeActions Complete AcceptAward	03/17/2006

Associated Documents

One item found. 1

Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date	Program Officer
Grants File	2037098		System Account	03/17/2006	System Account	Approved	03/17/2006	

Additional Documents

3 items found, displaying all items. 1

Document Name
Manage Award Recipient
Declined Award Comments
Accounting Details

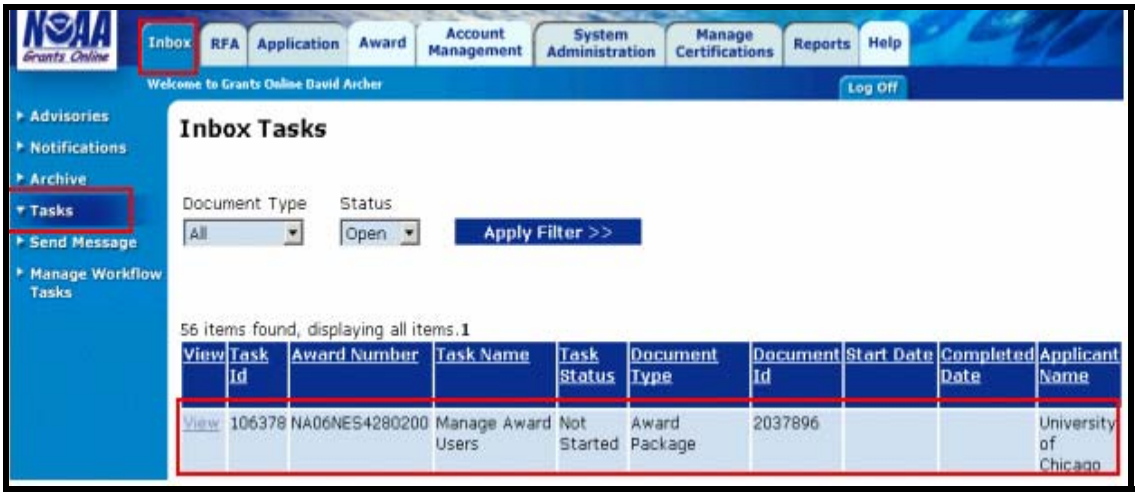
Associated Attachments

Nothing found to display.

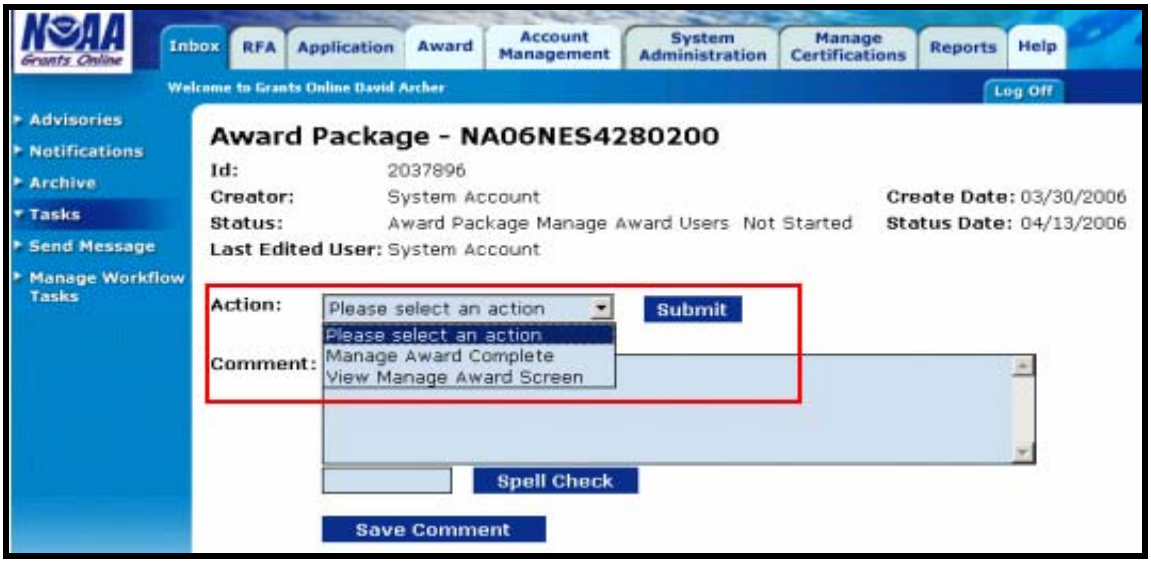
Recipient Administrator: Manage Award Users task

After the Recipient Authorized Representative accepts an Award via the Accept/Decline Award task, the Recipient Administrator will receive a task entitled “Manage Award Users.”

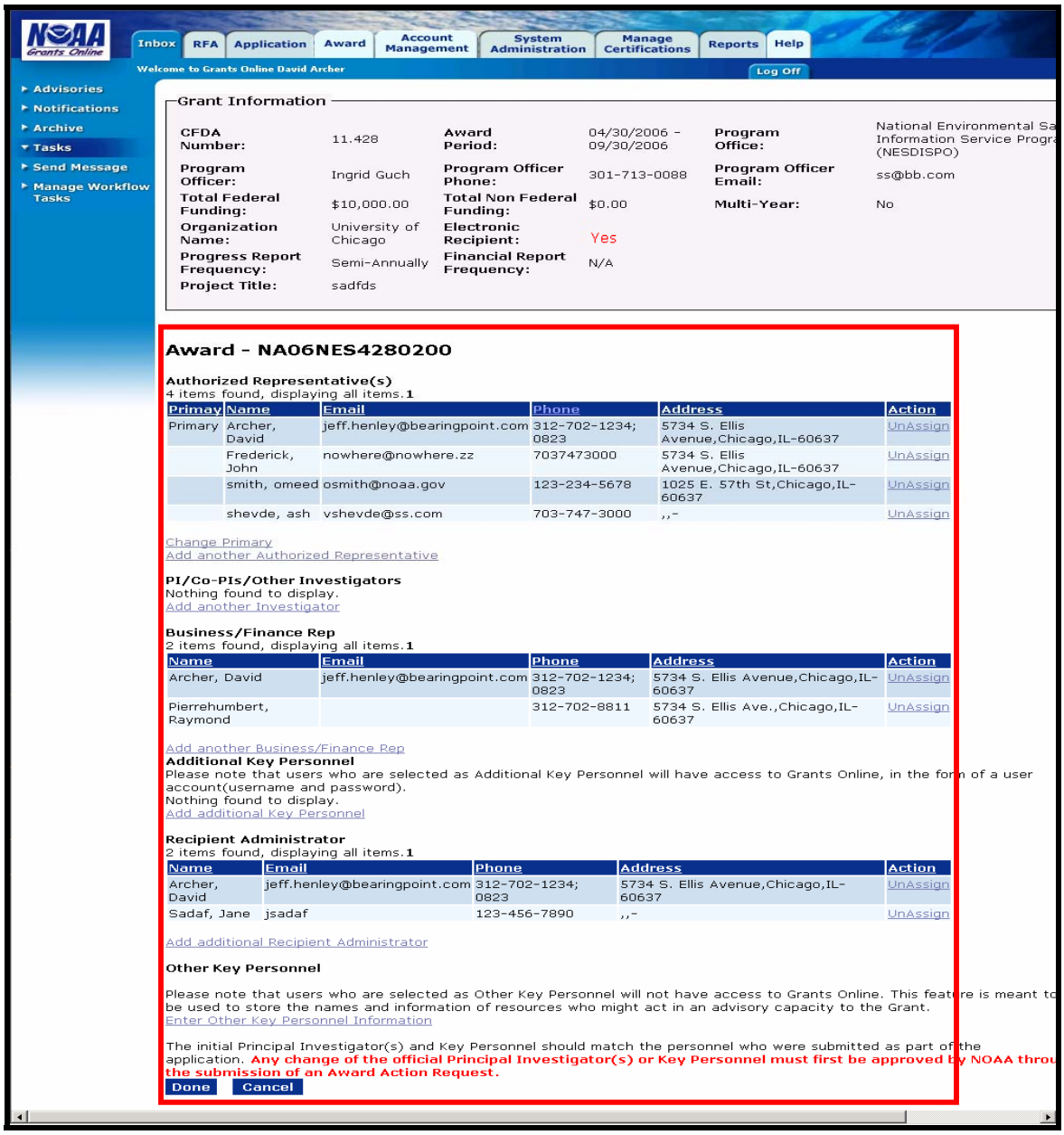
1. Select the **Inbox** tab.
2. Select the **Tasks** link.
3. Select the **View** link for the Manage Award Users task.



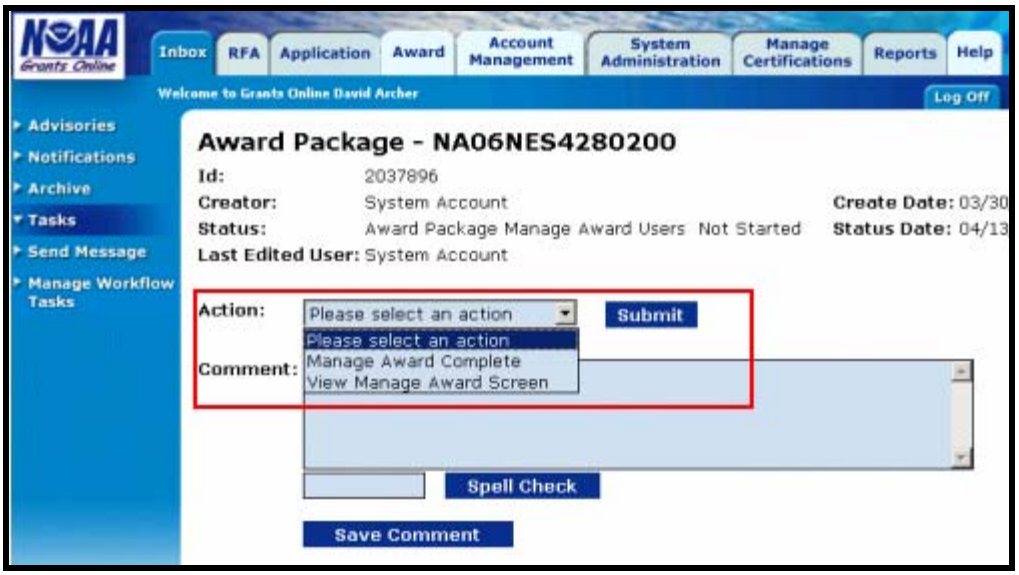
4. The following screen is the task launch page. From the action drop down menu select **View Manage Award Screen** followed by the **Submit** button.



5. The *Manage Award* Screen displays all the **Authorized Representatives, PI/Co-Pis/Other Investigators, Business/Financial Representatives, Recipient Administrators**, and **Other Key Personnel** that are associated with this Award within your organization. You may un-assign a user from this Award by selecting the **UnAssign** link in the **Action** column. You may also add another user that is not listed. For example, if you would like to add another PI, in the **PI/Co-Pis/Other Investigators** section select the **Add another Investigator** link. Please note, the initial Principal Investigator(s) and Key Personnel should match the personnel who were submitted as part of the application. NOAA must first approve any change of the official Principal Investigator (s) or Key Personnel through the submission of an Award action request. A minimum of one Investigator and one Authorized Representative is Required
6. Once all the changes are complete select the **Done** button.

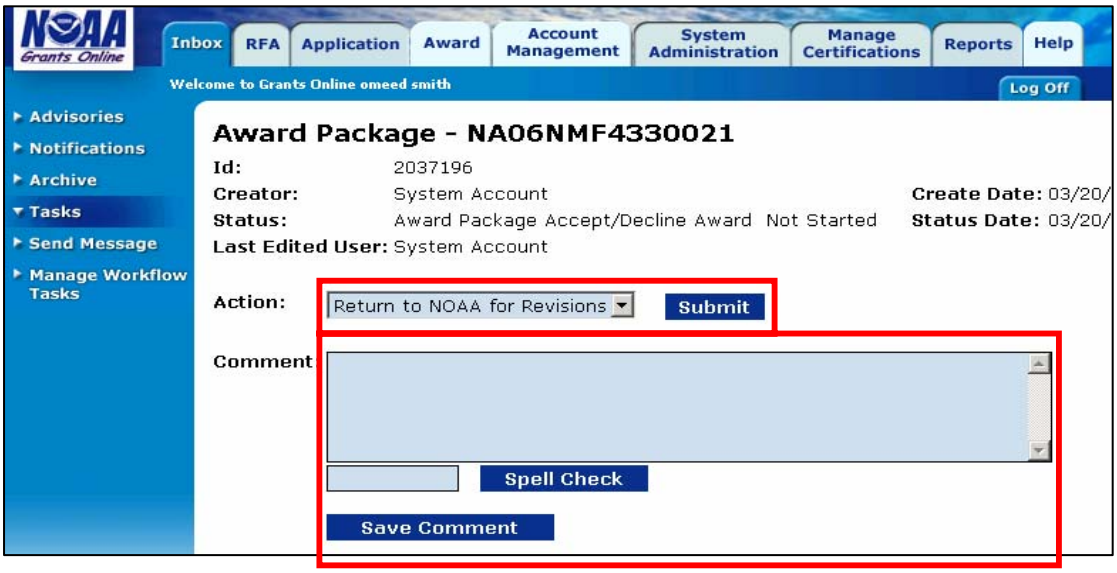


7. The following screen is the task launch page. From the action drop down menu select **View Manage Award Screen** followed by the **Submit** button.



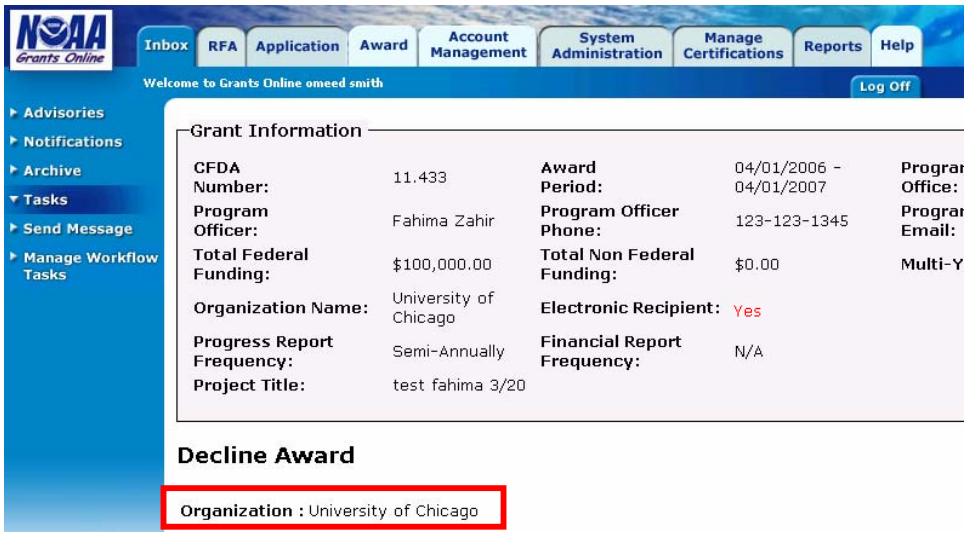
Returning Award to NOAA for Revisions

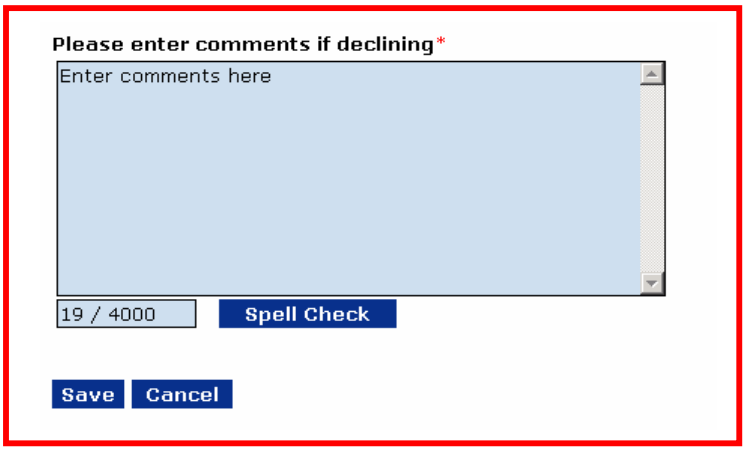
1. Upon selecting the **Return Award to NOAA for Revisions** action from the Accept/Decline task (See step 6 page 8), you may enter and save comments in the **Comment** box (underneath the action dropdown) to include your requested revisions. The Award is sent to the Grants Specialist who reviews/revises the Award based on your comments. The Grants Specialists can then send the Award back to the Recipient Authorized Representative to Accept/Decline via the Accept/Decline Award task.



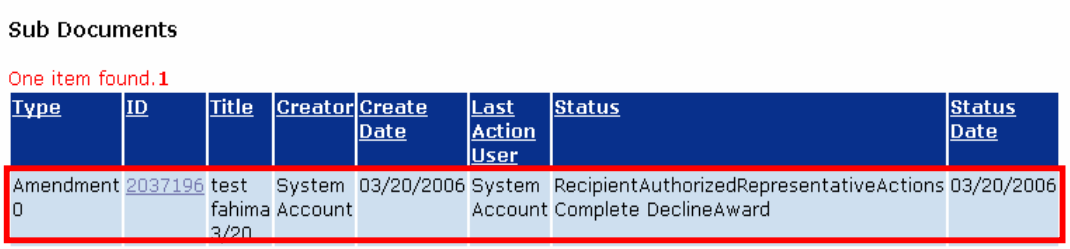
Declining an Award

1. Upon selecting the Decline Award action from the Accept/Decline task (See Step 6, Page 8), the *Decline Award* screen is displayed with your organization name. The COMMENTS field is mandatory when declining an Award. Select the **Save** button to ensure your comments are saved.





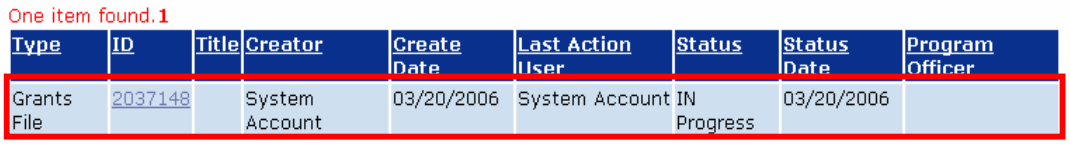
2. The next screen is the *Award Package* screen. Upon declining an Award this screen will reflect the status of the Award as "Recipient Authorized Representative has declined the Award." You may view the Award details by selecting the **Go to the Award Package details** (see page 8) link. You may also select the **Amendment ID hyperlink** to view the Amendment details or the **Grants File ID** hyperlink to view the Grants File. Please note the Grants file contains all the Award files for the Award. Select the **Declined Award Comments** link to view the comments entered when the Award was declined (see step 1 page 13).



Sub Documents

One item found. 1

Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date
Amendment 0	2037196	test fahima 3/20	System Account	03/20/2006	System Account	RecipientAuthorizedRepresentativeActions Complete DeclineAward	03/20/2006



Associated Documents

One item found. 1

Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date	Program Officer
Grants File	2037148		System Account	03/20/2006	System Account	IN Progress	03/20/2006	

Additional Documents

3 items found, displaying all items. 1

Document Name
Manage Award Recipient
Declined Award Comments
Accounting Details

Managing Recipient Users

Overview

Grants Online is designed to provide Grantees with flexibility and ease when setting up user accounts for individuals within your organization in Grants Online.

Module Objectives

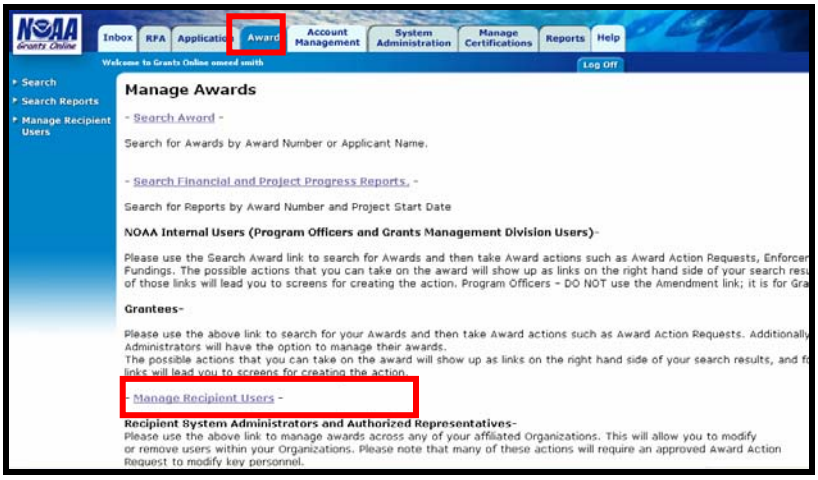
The Managing Recipient Users module will review the following objectives:

- Managing Recipient Users
- Editing User Profiles
- Adding New Users
- User Roles

Managing Recipient Users

The **Manage Recipient Users** link allows Recipient Authorized Representatives and System Administrators to view and edit user roles for your organization. The **Manage Recipient Users** link also allows Recipient Authorized Representatives and System Administrators to reset passwords and unlock accounts for users within their organization. Users with the role of Principal Investigators and Key Personnel do not have access to the **Manage Recipient Users** link.

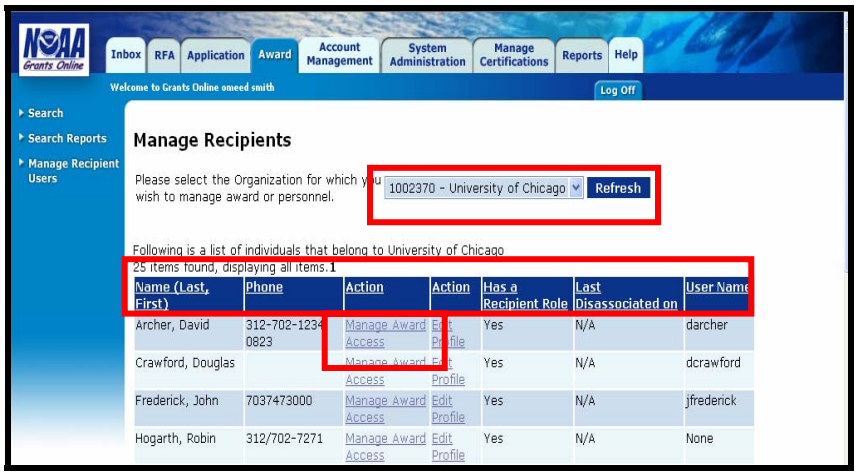
1. Click on the **Award** tab.
2. Click on the **Manage Recipient Users** link to access recipient profiles.



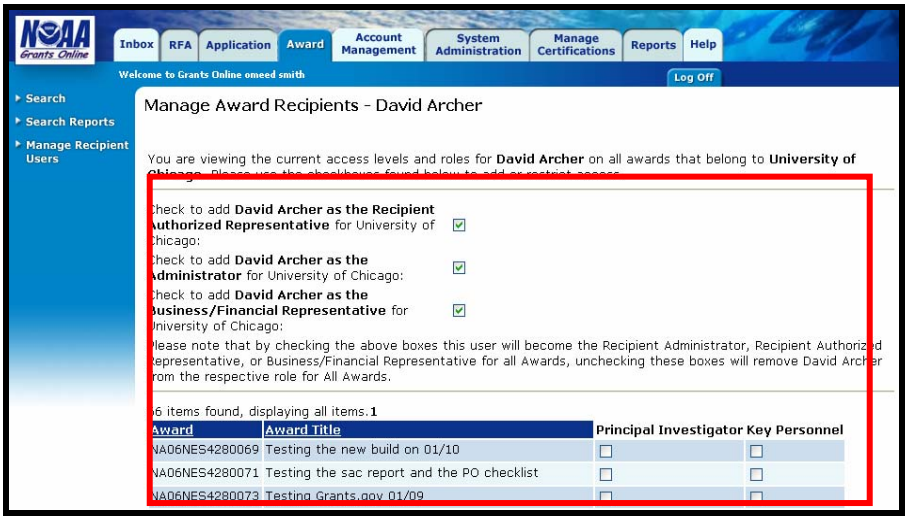
3. Select your organization from the drop-down menu followed by the **Refresh** button.
4. The following columns are displayed on the *Manage Recipients* screen:
   - **Name:** This column displays the name of the individual, with the last name first.

- **Phone:** This column displays the phone number of the individual.
- **Action:** The first action column displays the **Manage Award Access** link. This link allows System Administrators and Recipient Authorized Representatives to view/edit the current roles for each user as well as disassociate a user from the organization.
- **Action:** The second action column displays the **Edit Profile** link. This link allows System Administrators and Recipient Authorized Representatives to view users account information such as their name, address, email, and phone number. This link also allows System Administrators and Recipient Authorized Representatives to reset passwords and unlock accounts.
- **Has a Recipient Role:** If **Yes** is displayed in this column, the individual has a role in Grants Online. If **No** is displayed in this column, the individual doesn't have a role in Grants Online. Please note when a user is disassociated from your organization in Grants Online, all user roles are removed and **No** is automatically displayed in this column.
- **Last Disassociated on:** This column displays the last date a user was disassociated from your organization in Grants Online. Please note once a user is disassociated from your organization, all user roles are permanently removed. The System Administrator or the Recipient Authorized Representative must create a new account for the individual to re-activate the account. If **N/A** is displayed in this column, the user has not been disassociated from your organization.
- **User Name:** If the individual has a username it will be displayed in this column. If the user does not have a username, **None** will be displayed.

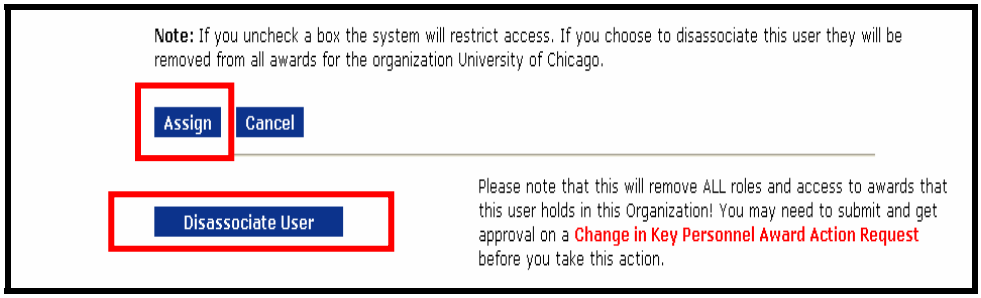
For the purposes of this manual we will select the **Manage Award Access** link.



5. The *Manage Award Recipients* screen is displayed. From this screen you will be able to view and edit each individual's role. Select the check box next to the role that you would like to assign for each user. The Recipient Authorized Representative, System Administrator, and Business/Financial Representative roles are listed across the top of the screen. You may also assign the role of the Principle Investigator or Key Personnel for each Award.



6. Select the **Disassociate User** button to disassociate a user from Grants Online, who is no longer a part of your organization or is no longer, associated with the Award(s). This action removes all of the roles for the user in Grants Online. To save changes to the user's role select the **Assign**.

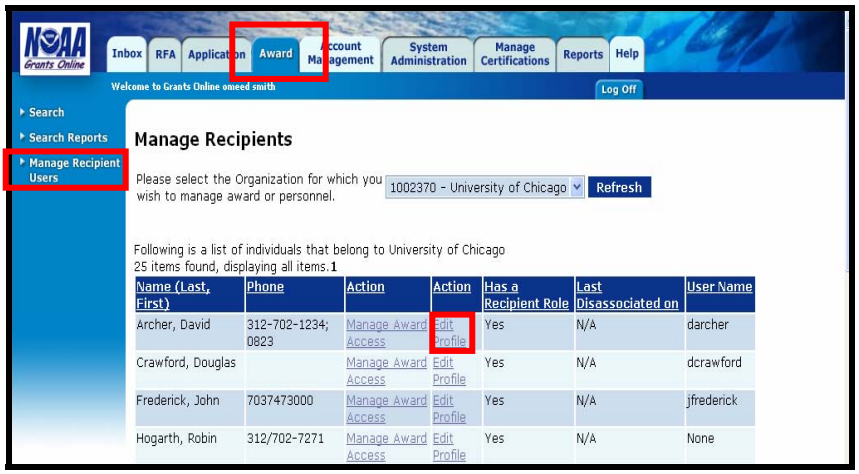


Note: Once a user has been disassociated, their name will continue to appear in the list of individuals associated with the organization for tracking purposes. The date the user was disassociated will be listed in the "Last Disassociated On" column.

Editing User Roles

From the *Manage Recipients* screen, you will see a list of individuals who are associated with your organization in Grants Online. To assign a username and password to an individual who is already on that list, select the **Edit Profile** link for that specific individual.

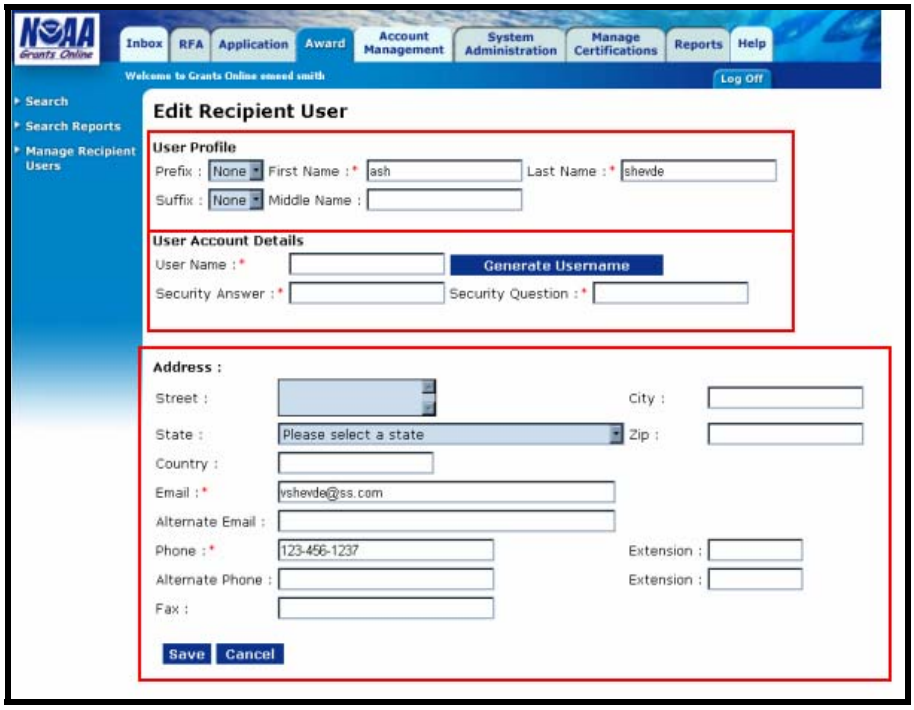
1. Select the **Award** tab.
2. Select the **Manage Recipient Users** link.
3. Select the **Edit Profile** link.



4. The following screen is the *Edit Recipient* screen. Enter the information for the user. All fields with a red asterisk are required. On the *Edit Recipient* screen the following fields are required:

- FIRST NAME and LAST NAME.
- USERNAME: You cannot enter a username in the USERNAME field. You must generate a username by clicking the **Generate Username** button.
- SECURITY QUESTION and SECURITY ANSWER: Enter a security question and answer for each user. This question and answer is used to authenticate the identity of the caller if they contact the Help Desk for assistance with resetting a password or unlocking an account.
- EMAIL ADDRESS: Enter the email address. This is the email address that is used by Grants Online to generate notification and task emails.
- PHONE: Enter the phone number for the individual.

Once all of the information has been entered, select the **Save** button.



Adding a new User

From the *Manage Recipients* screen, you will see a list of individuals who are associated with your organization in Grants Online. To create a Grants Online account for an individual who is not on the list, select the **Add Another User** link at the bottom of the page.

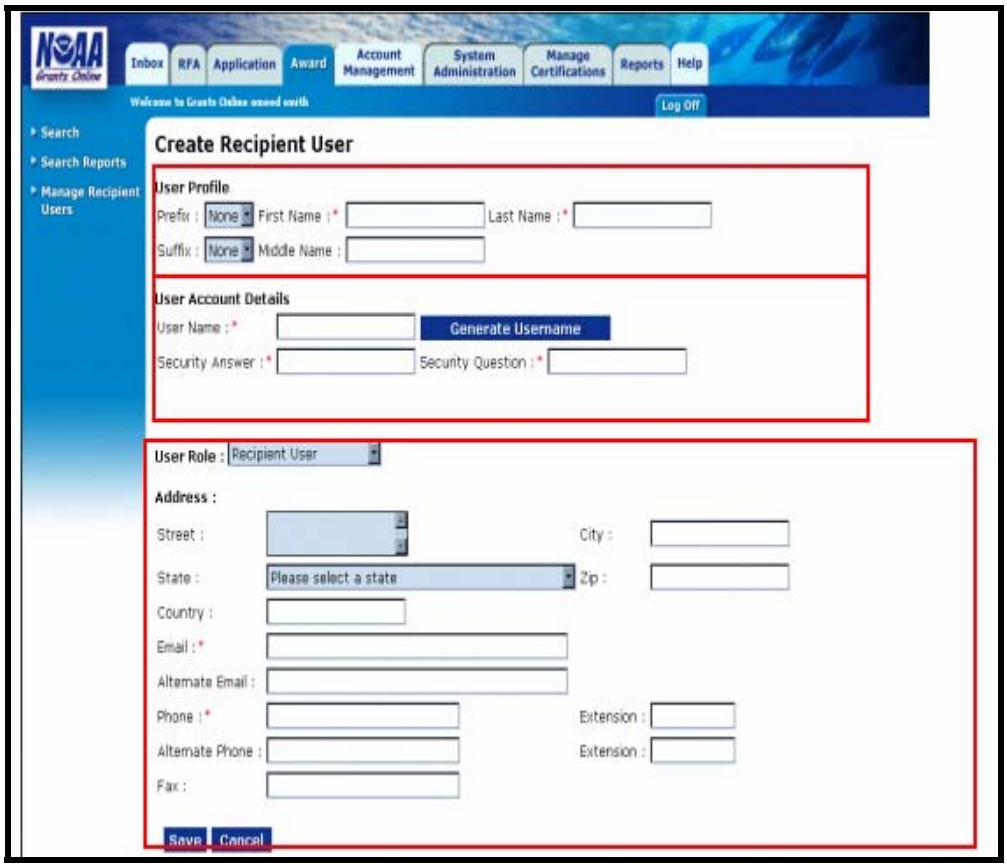
1. Select the **Award** tab.
2. Select the **Manage Recipient Users** link.
3. Select the **Add Another User** link. To view a list of all the current users, click on the **Generate Active Award Access Report**.

smith, omeed	123-234-5678	Manage Award Access	Edit Profile	Yes	N/A	osmith
Sadaf, Jane	123-456-7890	Manage Award Access	Edit Profile	Yes	N/A	jsadaf
Ballah, Anne	1234567890	Manage Award Access	Edit Profile	Yes	N/A	aballah
Johnson, Zach	xxx	Manage Award Access	Edit Profile	Yes	N/A	zjohnson
Costanza, Frank	7037473000	Manage Award Access	Edit Profile	Yes	N/A	fcostanza
user, recipient	123456788990	Manage Award Access	Edit Profile	Yes	N/A	ruser
Oveis, Chris	1234567890	Manage Award Access	Edit Profile	Yes	N/A	coveis
miracle, movie	1234567890	Manage Award Access	Edit Profile	No	N/A	mmiracle
Marzinzik, Mary Jo	111-111-1111	Manage Award Access	Edit Profile	Yes	N/A	mmarzinzik
Springer, Amanda	111-111-1111	Manage Award Access	Edit Profile	Yes	N/A	aspringer
shevde, ash	703-747-3000	Manage Award Access	Edit Profile	Yes	N/A	None

4. The following screen is the *Create Recipient* screen. Enter the information for the user. All fields with a red asterisk are required. On the *Edit Recipient* screen the following fields are required:

- FIRST NAME and LAST NAME
- USERNAME: You cannot enter a username in the USERNAME field. You must generate a username by clicking the **Generate Username** button.
- SECURITY QUESTION and SECURITY ANSWER: Enter a security question and answer for each user. This question and answer is used to authenticate the identity of the caller when they contact the Help Desk for assistance with resetting a password or unlocking an account.
- USER ROLE: Using the drop down menu to select the user role for the new user. See pages 28 and 29 to view the different type of grantee roles in Grants Online.
- EMAIL ADDRESS: Enter the email address. This is the email address that is used by Grants Online to generate notification and task emails.
- PHONE: Enter the phone number for the individual.

Once all of the information has been entered select the **Save** button.



User Roles

The list below displays the various user roles that Grantees may have in Grants Online. Grantees may have more than one user role. For example, depending on the structure of your organization, you may have more than one Recipient Authorized Representative.

- Recipient Authorized Representative
- Recipient System Administrator
- Budget/Financial Representative
- Principal Investigator
- Key Personnel

The chart below details the various Grantee roles in Grants Online.

Grants Online Grantee User Roles and Definitions	
User Role	**Definition**
Recipient Authorized Representative	**Recipient Authorized Official** users are individuals with signature authority who sign official grant documents such as an SF-424 (application), or countersigns an Award document such as a CD-450 (new Award) or CD-451 (amendment). More than one person can have this role at any organization; however on each Award one person will be designated the primary "Authorized Representative."
System Administrator	**System Administrators** have the permissions needed to set up other people in their organization as users of the Grants Online system and to give them access to specific awards as appropriate.
Business/Financial Representative	**Business/Financial Representative** users are able to fill out Federal Financial Reports in Grants Online.
Principal Investigator	The **Principal Investigator** role is assigned to the PI and Co-PI in an organization. Users with this role can initiate an "Award Action Request" but cannot submit it directly to NOAA. Instead it will be sent to the Authorized Representative for their organization.
Key Personnel	Persons with the role of **Additional Key Personnel** will be able to view the Awards for their organization; however they will not be able to initiate any actions or otherwise perform tasks within the system.

The chart below details the functionality for each of the Grantee roles in Grants Online. One user can have multiple roles and multiple users can have the same role.

Grants Online Grantee User Roles and Functionality					
FUNCTIONALITY/ROLE	Recipient (System) Administrator	Recipient Authorized Representative	Recipient Business/Fin Representative	Recipient Investigator (PI/Co-PI)	Recipient User (Additional Key Personnel)
Access All Awards for Organization	X	X	X		
Access Only Specific Awards for Organization				X	X
Manage Organization User Profiles	X	X			
Manage Organization User System Access	X	X			
Reassign Tasks	X	X			
Initiate Award Action Requests	X	X	X	X	
Initiate Financial and Progress Reports	X	X	X	X	
Submit Award Action Requests		X			
Submit Financial and Progress Reports		X			

For more information on any of the Grants Online functionality detailed in this manual, please contact the Grants Online Help Desk at 301-713-1000 or toll free at 1-877-662-2468.