Grantee Training Manual

Performance Progress Reports

Prepared by BearingPoint, Inc.

Version 2.6

June 28, 2007
# Table of Contents

**TABLE OF CONTENTS**.............................................................................................................. I

**DOCUMENT CONVENTIONS**........................................................................................................... I

**GRANTS ONLINE OVERVIEW**.............................................................................................................. I

  **Grants Online Software Description**............................................................................................... 1

**GETTING STARTED** .......................................................................................................................... 3

  Accessing Grants Online ................................................................................................................... 3

  Logging in to Grants Online................................................................................................................. 4

**PERFORMANCE PROGRESS REPORTS**.............................................................................................. 7

  **Performance Progress Reports – Overview**..................................................................................... 7

  Searching and Viewing Performance Progress Report...................................................................... 7

  Forwarding the Performance Progress Report to the Agency as an Authorized Representative..... 14
# 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.

<table>
<thead>
<tr>
<th>Text Conventions</th>
<th>What it means.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text in Bold; Click <strong>Done</strong></td>
<td>Indicates a command.</td>
</tr>
<tr>
<td>Text in Italics; <strong>CD450 Details</strong> screen appears.</td>
<td>Indicates a screen.</td>
</tr>
<tr>
<td>Text in Bold Italics; <strong>Name</strong></td>
<td>Indicates data to be entered into a field.</td>
</tr>
<tr>
<td>Text in All Caps; <strong>LOGIN</strong></td>
<td>Indicates a field name.</td>
</tr>
</tbody>
</table>

**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.
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 polices. The process of awarding grants to the most qualified applicant for a competitive Award, and to qualified designated applicants of non-competitive Awards, was also largely paper-driven.

As part of its strategy to move scientifically and operationally into the 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 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.
This page intentionally left blank.
Grantee Training Manual, Performance Progress Report

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 Grants Online, all actions within the system can be made through mouse and keyboard. In this module, you will be shown the basics of Grants Online, including the look and feel of the system, navigation, and user customizations.

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

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

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

Accessing Grants Online

1. Click on the Internet Explorer Icon on your desktop to open the Internet Explorer browser.

2. Enter the following URL information in your address bar of your browser: http://www.grantsonline.rdc.noaa.gov then press ENTER
   - Grants Online Login page appears
**Logging in to Grants Online**

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

---

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

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

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

5. The Notice to Users screen appears.
6. Review disclaimer information and click OK.
This page intentionally left blank.
Performance Progress Reports

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

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

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

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

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

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

Searching and Viewing Performance Progress Report

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

![Search for Award](image1.png)

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

![Search Results](image2.png)
4. Once you have selected an Award, the following Grants File page is displayed. Please note the Grants file lists all of the Award files for the Award in the Sub Documents section. Award file 0 is the original Award and the subsequent Award files such as Award file 1 and Award file 2 represent either Amendments and/or Award Action Requests.
5. Scroll down to the bottom of the Grants File screen to view the Associated Documents section and view the Performance Progress Reports. It is possible that the report you wish to create was pre-generated in anticipation of you finishing and submitting the report. If the status states “In Progress,” then the report is ready for you to complete and submit. Click on the ID link for the report.

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

6. The Performance Progress Report Screen is displayed. Select the link entitled, Go to Performance Progress Report Details Page. If a Performance Progress record is not available for completion and submission, contact the Grants Online Help Desk and request to have the necessary report record added to Grants Online.
5. The **Performance Progress Report – Simple Version** screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users.

6. The large text box that is visible as part of the simple report screen may be used to provide an overview or introduction to your report, including an explanation of the attached files. Alternatively, if you have a simple or short report, it may be entirely entered in this text box.

7. Review the detailed Performance Progress Report information, including designation of Final Report, Reporting Period, and Due Date. If you need to change this information, please contact the Grants Online Help Desk.

8. Attach files by selecting the **Attach Files** link.

9. Once all the information has been entered, click the **Save** button, followed by the **Complete Report** button.
10. Once you have completed the report and selected the **Complete Report** button from the *Performance Progress Report* screen, you will receive a task to Review the Performance Progress Report. Navigate to the **Inbox** tab, select **Tasks** from the menu on the left, and select the **View** link for the Performance Progress Report task.

![Inbox Tasks](image)

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

![Performance Progress Report](image)
12. After reviewing and editing the Performance Progress Report, select the **Complete Report** button.

![Complete Report Button](image)

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

![Submit button](image)
Forwarding the Performance Progress Report to the Agency as an Authorized Representative

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

1. Select the Inbox tab followed by the Tasks link. Select the View link next to the Review Progress Report task.
2. The following screen is the task launch page. From this screen you may select one of the following options:

- **Forward Progress Report to Agency** – Select this action to forward the Progress Report to NOAA for review and Approval.
- **Return Progress Report for Revisions** – Select this action to return the Progress Report to the creator for revisions. For example, if a Principal Investigator submitted this report, a task to review the Progress Report is sent to the Principal Investigator.
- **View Progress Report** – Select this action to allow the Authorized Representative to view the report before forwarding the report to the agency.

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

3. The **Performance Progress Report – Simple Version** screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users.

4. The large text box that is visible as part of the Simple Report screen may be used to provide an overview or introduction to your report, including an explanation of the attached files. Alternatively, if you have a simple or short report, it may be entirely entered in this text box.
5. Review the detailed Performance Progress Report information, including designation of Final Report, Reporting Period, and Due Date. If you need to change this information, please contact the Grants Online Help Desk.

6. View and edit the attached files by selecting the Attach Files link.

7. Once all the information has been reviewed, click the Save button, followed by the Complete Report button.

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