



Electronic Grants Administration & Management System

Grantee User Manual

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1 Preface

This section of the manual provides you information about the manual, the intended audience, and conventions used. Upon reading this section you will understand the context of the manual and will be familiar with the terms used in this manual.

1.1 About this Manual

Welcome to the **E**lectronic **G**rants **A**dministration and **M**anagement **S**ystem (EGrAMS) Grantee User Manual. This document is to be read after reading the EGrAMS General User Manual, which is the first document in the series of EGrAMS User Manuals.

The EGrAMS Grantee Manual provides an introduction to the role of a grantee in the grants process and detailed information of the application features available to the grantee. This manual helps learn how to use the functionality available to a grantee in the EGrAMS application.

1.2 Intended Audience

This manual is primarily intended for applicants or grantee users of EGrAMS to learn how to use various features available to them. In addition, this manual may be of use to the following groups of users:

- Grant application reviewers
- Grant administrators
- Finance personnel
- Help desk personnel
- EGrAMS software support team

1.3 Organization of this Manual

This manual is expected to be read after reading the EGrAMS General User Manual. After learning the concepts and common features of the EGrAMS application in the EGrAMS General User Manual, this manual helps you learn the application functionality that is specific to a grantee's role.

The first chapter in this manual provides an overview of the grantee role in the EGrAMS system. The remaining sections of this manual explain each of the features available to an EGrAMS user with a grantee role. Topics in this manual are grouped as grant application related activities, reporting activities and miscellaneous activities based upon their positioning in the grants life cycle.

2 Overview of the Grantee Role in EGrAMS

This section of the manual provides an overview of the grantee's role and responsibilities in EGrAMS application within the context of the grants life cycle.

2.1 Introduction

A grantee is an organization or an individual receiving funds or grants for a specific project or program.

Grantees use the EGrAMS system to perform all grant-related activities online. Using EGrAMS, they will be able to learn about grant opportunities, submit letter of intent, submit grant applications, view the status of their applications, accept or decline awards, submit necessary post-award reports, and verify payments received or pending from the grant-giving organization.

Grantees receive the necessary communication from grant-giving agency about the status of their application, reviews, award, and payments through the emails generated by the EGrAMS system. They can view all emails received from EGrAMS in their personal email box as well as within EGrAMS.

This manual explains each of the features available to grantees in EGrAMS. To be able to perform all the activities described in this manual, you should have a user profile in EGrAMS with active user status, your role in EGrAMS should be 'Grantee' and you should have been logged in to the system. User role in EGrAMS is determined when creating a user profile.

The activities performed by a grantee in EGrAMS can be classified in to three broad categories:

1. Pre-award activities
2. Post-award activities
3. General activities

Pre-award activities

The activities performed in EGrAMS before receiving grant / award are called pre-award activities. The pre-award activities of a grantee include:

1. Learning about grant opportunities

When a grant-giving organization announces a new grant program, grantees learn about the program either by an email that is sent through EGrAMS (if they have previously registered to receive grant notifications), or through other sources.



To learn how to register with EGrAMS for receiving emails about grant program notifications, see the Grant Opportunity Notification topic in EGrAMS General User Manual.

2. Creating a user profile



To learn how to create a user-profile, refer the EGrAMS General User Manual.

3. Creating and submitting applications for grants. This activity in EGrAMS includes the following sub-activities:
 - Initiating a grant application
 - Assigning grantee agency users to a grant application
 - Editing a grant application and validating application data
 - Viewing, Printing and saving a complete / in-process application
 - Submitting a grant application

Post-award Activities

When the grant applications are processed and a decision is made by the grantor organization, applicants are communicated about the status of their applications. The grantor generated and uploads relevant contract or notification documents in EGrAMS for the approved applications. After receiving the communication of approval, the applicant can review the document online and accept or decline the award using EGrAMS.

The activities performed after the applicant accepts an award are post-award activities. The post-award activities of a grantee include the following:

- Preparing and submitting progress reports
- Submitting expense claims
- Viewing payment status
- Amendment requests

General Activities

In addition to the activities associated with the grant life-cycle, this manual also describes the EGrAMS features for common grantee tasks such as:

- Viewing email messages
- Viewing the status of an application
- Updating user profile
- Updating Agency Information

3 Pre-award activities

3.1 Grantee Tasks before Application Submission

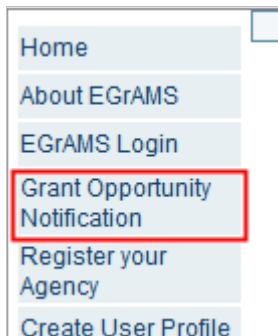
EGrAMS provides several features for grantee users before they submit an application for a grant program. This section describes the following Pre-Award, Pre-Application activities for the Grantee role in the EGrAMS system:

- Grant Opportunity Notification
- Register Your Agency
- Project Director Request
- View Current Grants
- Search for Grants
- Submit Program Questions

3.1.1 Grant Opportunity Notification

EGrAMS allows potential applicants to register to receive a system generated notification when a grant opportunity becomes available. The link to register to receive such notifications is available on the EGrAMS Home Page. You do not need to have an account in the EGrAMS system to access this screen and submit request for notification.

To access this functionality, click on the highlighted link on the EGrAMS Home Page:



The Grant Opportunity Notification Screen supports the following modes:



1. Register – Allows you to register to receive email notification when a new grant program is published
2. Un-Subscribe - Allows you to unsubscribe from receiving email notifications if you had previously registered.
3. Change email – Allows you to update your contact email on which to receive notification with which you had previously registered.

3.1.1.1 Register

Select this option to register to receive email notification whenever a new grant program is published by the implementing agency. You need to register your information only once. The system will automatically send you an email notification whenever a new grant program is published.

An example of this screen in the 'Register' mode has been shown below:

Grant Opportunity Notification (*)-required field Date: Sep-30-10

Home **Register** Un-Subscribe Change Email

Disclaimer:
 This service is provided for convenience only and does not serve as a guarantee of notification. Subscribers to this list service are ultimately responsible for reviewing HTC's Grant Opportunities site for all information relevant to desired funding opportunities.

I Agree Yes No

Register for grant opportunity and notification

*Email: jsmith@egram.org
 *Agency Name: Resources of America
 *First Name: John *Last Name: Smith

*Category	Description	All	*Sel	Agency
COMP	Competitive Grants	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Private, Non-Profit
		<input type="checkbox"/>	<input checked="" type="checkbox"/>	For-Profit
		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Public

Select and click Add **Add** **OK** **Cancel**

Comment Line: For each category, select all agency and click on Add

The screen comprises of three segments of information:

1. Disclaimer
2. Personal Information
3. Grant Information

3.1.1.1.1 Disclaimer

The Disclaimer section displays the applicable text. Make sure that you read the text carefully before selecting yes (or no).

I Agree – You need to accept the disclaimer to use the grant opportunity notification service.

3.1.1.1.2 Personal Information

This section collects your personal information like email address, agency name, first and last name.

Srl	Field	Description
1.	Email	Enter your email address
2.	Agency Name	Enter your agency name
3.	First Name	Enter your first name
4.	Last Name	Enter your last name

3.1.1.1.3 Grant Information

This section collects the grant category information that you may be interested in receiving email notifications. An implementing agency may support multiple grant categories and you as a grantee

agency may not be eligible to apply for all the grant categories. You may select one or more grant categories.

Srl	Field	Description
1.	Category	Enter the grant category. You may invoke the lookup to select the available grant category
2.	Description	This is a display only field and based on the grant category selected, the system displays the corresponding grant category description
3.	All	Many grant programs may be applicable to specific agency types (e.g. Non-Profits, Public, etc). Click on the checkbox to select all the displayed agency types
4.	Sel	You need to select these checkboxes only if you did not mark the 'All' checkbox. Click on individual agency types as applicable
5.	Agency	This is a display only field and displays the available agency types for the implementing agency

Click on 'Add' to register your selected agency types.

To register for additional grant categories, repeat the above.

Click on 'OK' to save your grant opportunity registration information. On saving your information, the system will display the following information message.



Click on 'Cancel' to discard your grant opportunity registration information.

Once you are done, select the required options from the left pane to navigate to the desired screen within the application.

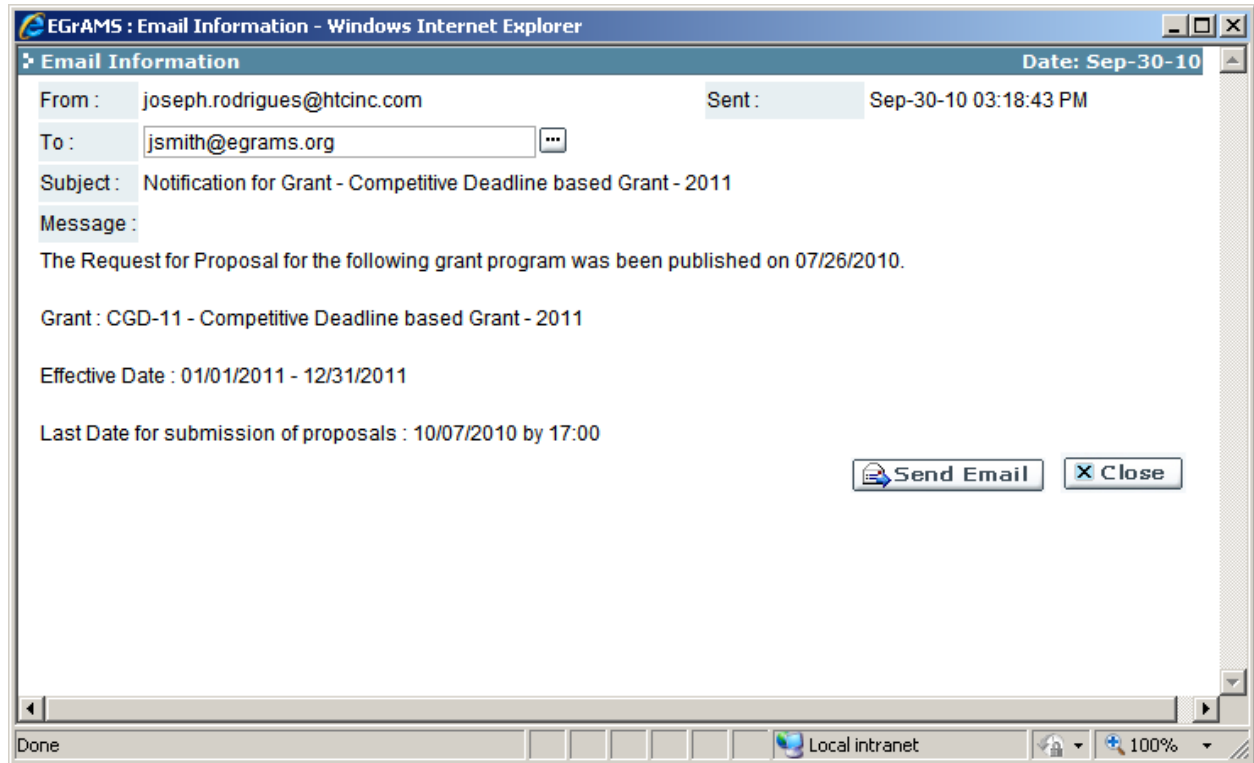
3.1.1.1.4 Errors

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

Srl	Error	Description	Corrective Action
1.	Please enter the contact email	The email address is blank	Enter your email address
2.	Given email is not valid. Enter as abc@abc.com	The email you entered does not meet the email address standards validated by the system	Verify your email address and re-enter
3.	Email address you entered already exists	Your email address has already been registered to receive grant opportunity notifications	You need not register your information again. If you wish to review your registration, you may select the 'Un-Subscribe' option
4.	Please enter the Agency Name	The agency name is blank	Enter your agency

Srl	Error	Description	Corrective Action
			name
5.	Please enter the First Name	First name is blank	Enter your first name
6.	Please enter the Last Name	Last name is blank	Enter your last name
7.	You must accept the agreement	Disclaimer is not marked or you have selected 'No' to the disclaimer agreement	Select 'Yes' to the disclaimer agreement
8.	Please select at least one category	No grant category has been selected	Select a grant category. Use the lookup the review and select the desired grant category
9.	Please select one agency under each category	You did not click 'Add' after marking the checkbox for the agency type (All or Sel)	Click 'Add' after marking the respective checkbox

Once a grant program has been published by the implementing agency, you will receive the following email notification.



3.1.1.2 Unsubscribe

Select this option to unsubscribe from receiving email notifications whenever a new grant program is published by the implementing agency. To unsubscribe, you should have registered to receive grant opportunity notifications.

An example of this screen in the 'Unsubscribe' mode has been shown below:

Grant Opportunity Notification (*)-required field Date: Sep-30-10

Home Register Un-Subscribe Change Email

Unsubscribe from grant opportunity and notification

*Email: jsmith@egrms.org

*Agency Name: Resources of America

*First Name: John *Last Name: Smith

OK Cancel

Comment Line: Enter your email address

3.1.1.2.1 Personal Information

Srl	Field	Description
1.	Email	Enter your email address. On tabbing out of the field, the system will display your information
2.	Agency Name	Displayed by the system
3.	First Name	Displayed by the system
4.	Last Name	Displayed by the system

Click on 'OK' to unsubscribe from receiving electronic grant opportunity notifications.

Click on 'Cancel' to discard your unsubscribe request.

Once you are done, select the required options from the left pane to navigate to the desired screen within the application.

3.1.1.2.2 Errors

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

Srl	Error	Description	Corrective Action
1.	Email address you entered does not exist	The email address is blank or you had not registered to receive grant	Select another option

Srl	Error	Description	Corrective Action
		opportunity notification	
2.	Entered email is not valid	The email you entered does not meet the email address standards validated by the system	Verify your email address and re-enter

3.1.1.3 Change Email

Select this option to change your email address that was used to register to receive grant opportunity notification. To change your email address, you should have registered to receive grant opportunity notifications.

An example of this screen in the 'Change Email' mode has been shown below:

Srl	Field	Description
1.	Email	Enter your email address. On tabbing out of the field, the system will display your information
2.	Agency Name	Displayed by the system
3.	First Name	Displayed by the system
4.	Last Name	Displayed by the system
5.	New Email	Enter your new email address
6.	Re-enter Email	Confirm your email address

Click on 'OK' to change your email address. Once your email address has been changed, the system will display information message – Your email address has been changed.

All grant opportunity notifications from receiving electronic grant opportunity notifications.

Click on 'Cancel' to discard your Change Email request.

Once you are done, select the required options from the left pane to navigate to the desired screen within the application.

3.1.1.3.1 Errors

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

Srl	Error	Description	Corrective Action
1.	Email address you entered does not exist	The email address is blank or you had not registered to receive grant opportunity notification	Select Register option
2.	Given email is not valid. Enter as abc@abc.com	The email you entered does not meet the email address standards validated by the system	Verify your email address and re-enter
3.	Given email does not match	The new email and the confirmation email are not the same	Enter the new email and confirmation email as the same email address
4	Your new email address already exists	The new email address entered has already been registered to receive notification	Enter a different email address, if required.

3.1.2 Register your Agency

All agencies need to have their agency information created in the EGrAMS system. This information needs to be entered only once. However, your agency information needs to be entered in the EGrAMS system before you can:

1. Create your EGrAMS User Login
2. Submit a Project Director Request

Depending on the specific EGrAMS implementation, you may or may not require being logged-in to access this functionality.

If you use an external system for authenticating your credentials (such as login name, password), you are required to login to the external system before accessing this functionality.

If you do not use an external system for authentication, you can directly access this link from the EGrAMS Home page.

To access this functionality, click on the highlighted link on the EGrAMS Home Page:

The screen displayed by clicking this link varies based on the specific EGrAMS implementation. The following screen may or may not be displayed for your implementation. If this screen is not displayed, please skip this section and move to the next screen titled 'Grantee Agency'.

The following table provides a description of the contents of this screen:

Srl	Field	Description
1.	Agency Class	Enter your agency class or invoke the lookup to select the desired agency class
2.	Class Description	Displayed by the system

Click on 'OK' to proceed.

Click on 'Cancel' to return to the EGrAMS Home page.

3.1.2.1 Errors

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

Srl	Error	Description	Corrective Action
1.	Agency Class cannot be blank. Please enter a valid agency class.	An agency class has not been entered for the agency to be	Invoke the lookup to select an agency class and then click the 'OK'

Srl	Error	Description	Corrective Action
		created in EGrAMS.	button.

An example of this screen after clicking 'OK' in the above screen has been shown below:

Grantee Agency (*)-required field Timeout Left: 60 mins Date: Oct-22-10

Agency Information

*Federal ID. & Agency Name: 92-0158003 Marquette Institute

DUNS Number: AEC07269 Vendor Reference:

*Address Line 1: P.O. Box 4006 Address Line 2:

*City: Marquette *State: MI *Zip: 49855

Website: www.marquette-i.org

Faith Based: Yes No MI based business: Yes No

*Agency Type: PUB Public Agency Sub-Type: OTH Others

Contact Information

*Contact Person: John King *Email: contact@marquette-i.org

*Phone: (906) 226-0044 Ext: Fax:

Mailing Address Same: Yes

*Code	*County	*Primary
<input checked="" type="checkbox"/> 001	Alcona	<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>

Contract Type Information (For Office use only)

Contract Type: Master Comprehensive Group N/A

Contract Applicability: Program Agency N/A

Contract Template:

Amendment Applicability: Program Agency N/A

Amendment Template:

The screen comprises of four segments

1. Agency Information
2. Contact Information
3. County Information
4. Contract Type Information

3.1.2.2 Agency Information

This section is used to enter the general information of the agency. The following table provides a description of the contents of this section:

Srl	Field	Description
1.	Federal Id	Enter your agency federal id (for example, 22-1234321). The system validates the federal id and displays the following confirmation message if an agency with the same federal number already exists: “This Federal Id already exists for <agency name>. Do you want to add another department / office to this Federal ID? Click OK to add a new department OR Cancel to add a new Federal ID” Click OK on this confirmation message if you want to add a new department / office with the same federal identification number, or Click ‘Cancel’ to clear-out the federal ID field and enter a different number
2.	Agency Name	Enter your agency name
3.	DUNS Number	If your agency has a valid DUNS number, enter the agency DUNS number. This information may or may not be entered
4.	Organizational Unit / Vendor Reference	This information may or may not be entered
5.	Address Line 1	Enter your agency street address
6.	Address Line 2	Enter Suite or P.O Box Number. This information may or may not be entered
7.	City	Enter the city in where your agency is located
8.	State	Enter the State your agency is in. You may invoke the lookup the select the desired state
9.	Zip	Enter 5 digit zip code (mandatory) and 4 digit zip code (optional)
10.	Web site	Enter your agency website URL, if available. This information may or may not be entered
11.	Agency Type	Select the grantee agency type by invoking the corresponding lookup.
12.	Agency Sub-Type	Select your agency sub-type by invoking the corresponding lookup. This information may or may not be entered.

3.1.2.3 Contact Information

This section of the screen is used to enter the agency primary contact information. The following table provides a description of the contents of this section:

Srl	Field	Description
1.	Contact Person	Enter your agency primary contact person's name
2.	Email	Enter your agency primary contact person's email address
3.	Phone	Enter your agency primary contact person's phone number with an extension, if applicable.

Srl	Field	Description
4.	Fax	Enter your agency primary contact person's fax number. This information may or may not be entered

3.1.2.4 County Information

This section is used to enter the county(ies) serviced by the agency. The following table provides a description of the contents of this section:

Srl	Field	Description
1.	Code	Enter the counties served by invoking the lookup to select the desired counties / regions.
2.	County	County / Region description displayed by the system
3.	Primary	Select the checkbox if the corresponding county / region is the primary county / region for the agency. The system allows only one county / region to be marked as primary.

3.1.2.5 Contract Type Information

This section is read-only, and can be entered only by authorized grantor staff.

Click on 'OK' to save your agency information.

Click on 'Cancel' to close the Agency information screen and return to the main screen.

3.1.2.6 Errors

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

Srl	Error	Description	Corrective Action
1.	Agency code cannot be empty	The federal id is blank	Enter a federal id
2.	Agency description cannot be empty	The agency name is blank	Enter the agency name
3.	Address 1 is empty	The street address is blank	Enter your agency street address
4.	City is empty	City is blank	Entry the city in which your agency is located
5.	State is empty	State is blank	Enter the state your agency is in. Invoke the lookup the select the desired state
6.	Zip 1 is empty	The 5 digit zip code is blank or is less than 5 digits	Enter a 5 digit zip code
7.	Select the agency type	The agency type is blank	Enter an agency type. Invoke the lookup to select the desired agency type
8.	The agency type you entered does not exist	The agency type entered is not valid	Enter a valid agency type or invoke the

Srl	Error	Description	Corrective Action
			lookup to select the valid agency type
9.	Please enter the contact name	The contact name is blank	Enter the agency primary contact person's name
10.	Please enter a valid email address	The email you entered is blank or does not meet the email address standards validated by the system	Enter a valid email address
11.	Please provide a 10 digit phone number	The phone number entered does not meet the validation criteria	Enter a 10digit phone number with the area code, and no spaces.
12.	The county entered does not exist	The county code entered is invalid	Enter a valid county code / invoke the lookup to select a valid county code
13.	You must select one county as your primary county	Checkbox under Primary has not been selected	Mark one county as the primary county

3.1.3 Project Director Request

A project director is a person from the grantee agency responsible for performing certain administrative functions within his or her agency for a specific grant program. A project director can

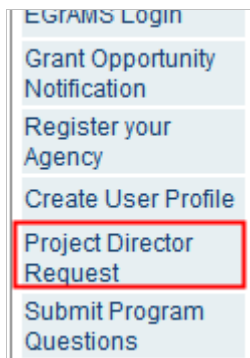
- Assign users from within his/her agency to have access to a grant application
- Register users from his/her agency for Technical Assistance sessions
- Update his/her agency information
- Submit a grant application for review
- Receive email notifications from grant monitors, reviewers based on the grant life cycle milestones
- Review the draft contract
- Submit periodic progress reports

Depending on the specific EGrAMS implementation, you may or may not require being logged-in to access this functionality.

If you use an external system for authenticating your credentials (such as login name, password), you are required to login to the external system before accessing this functionality.

If you do not use an external system for authentication, you can directly access this link from the EGrAMS Home page, and enter your user account credentials within this screen.

To access this functionality, click on the highlighted link on the EGrAMS Home Page:



Before you attempt to submit a Project Director Request, ensure that your agency information has been registered in the EGrAMS system.

EGrAMS Users

If you use the EGrAMS system to authenticate your user account information, on selection of the Project Director Request option, the system will display the screen as shown in the example below:

Project Director Set-Up Request (*)-required field Date: Oct-22-10

Home
About EGrAMS
EGrAMS Login
Grant Opportunity Notification
Register your Agency
Create User Profile
Project Director Request
Submit Program Questions
Register as a Review Volunteer
Validate Workstation
Search Grants
Current Grants

Do you have a valid EGrAMS Login Name: Yes No

*EGrAMS Login Name:

*Password:

Agency:

Is this your correct agency: Yes No

*Grant Category: Competitive Grants

*Grant Program: Competitive Deadline based Grant - 2012

Comment Line:

Select 'Yes' to 'Do you have a valid EGrAMS Login name'

If you select 'No' the system will display the following information message.



External Users

If you use an external system to authenticate your user account information, log into the external system and navigate to the EGrAMS Home Page. On selection of the Project Director Request option, the system will display the screen as shown in the example below:

Project Director Set-Up Request (*)-required field Date: Oct-22-10

Home
About EGrAMS
State User Login
myAlaska Login
Access EGrAMS
Grant Opportunity Notification
Register your Agency
Create User Profile
Project Director Request
Submit Program Questions
Validate

User:

Agency:

Is this your correct agency: Yes No

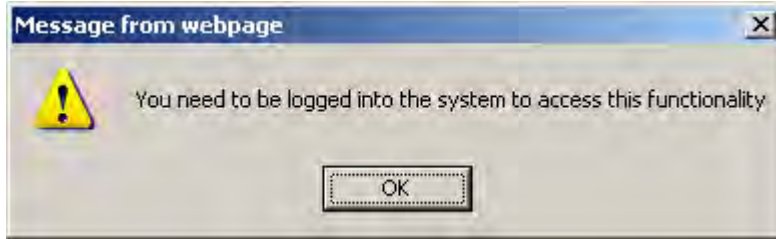
*Grant Category:

*Grant Program:

Comment Line:

For users authenticated by external systems, EGrAMS requires that the user profile be created in EGrAMS, before this functionality can be accessed. In this case, the system does not display the Login name and password fields on the screen and is pre-populated with your user name and parent agency from the user profile created in the EGrAMS system.

If you try to access this screen without logging into the external system first, EGrAMS will display the following error message:



3.1.3.1 Submit Project Director Request

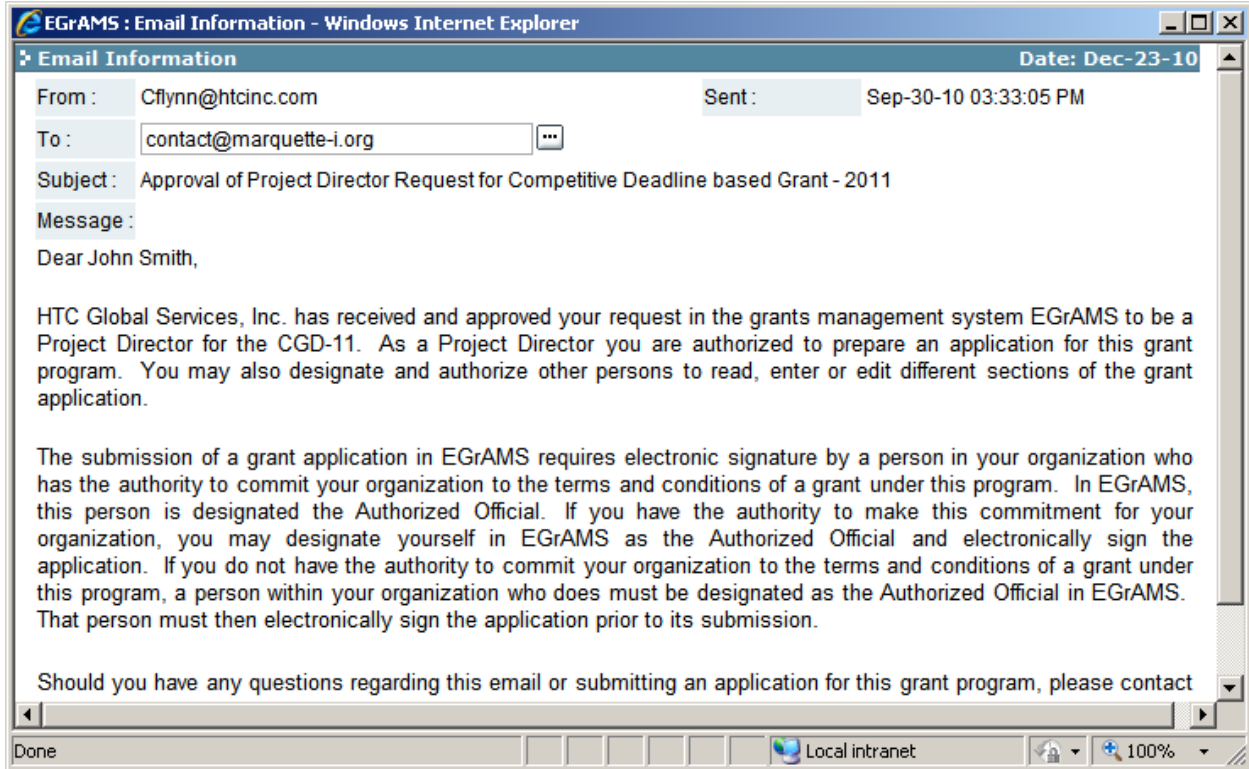
The following table provides a description of the contents of this screen:

Srl	Field	Description
1.	Do you have a valid EGrAMS Login Name **	Select 'Yes' if your user profile information is entered in the EGrAMS system. Select 'No' if your user profile information has not been entered in the EGrAMS system. If you select 'No' the system will not allow you to complete the Project Director request.
2.	EGrAMS Login Name **	Enter your EGrAMS login name
3.	Password **	Enter your password The system validates your user name and password and gives you an error if either your user name or password is incorrect.
4.	Agency	Displayed by the system based on the parent agency information in your user profile.
5.	Is this your correct Agency	If the agency displayed is your parent agency select 'Yes'. The agency displayed should be correct to be able to submit a project director request.
6.	Grant Category	Enter the grant category or invoke the lookup to select the valid grant category.
7.	Grant Program	Enter the grant program or invoke the lookup to select the valid grant program.

** - Field not applicable for users that have been authenticated by an external system

Click on '**OK**' to submit your project director request to the grant administrator, or, click on '**Cancel**' to discard your project director request and return to the EGrAMS Home page.

On approval of your project director request, you will receive an email notification as shown in the following example:



3.1.3.2 Errors

If you receive any errors, please refer to the table below for an explanation of the error and the corrective actions that may be needed.

Srl	Error	Description	Corrective Action
1.	Choose whether you have a valid EGrAMS login name	A selection has not been made for the field 'Do you have a valid EGrAMS login name'	Select Yes / No in response to the field 'Do you have a valid EGrAMS login name'
2.	Please enter your Login name	The login name is blank	Enter a login name
3.	Please enter your Password	The password is blank	Enter your password
4.	Invalid user name and password, please re-enter	The user name or password entered are incorrect	Please enter a correct user name and password. If you do not have a valid user name and password in EGrAMS, select the 'Create EGrAMS Login' option
5.	Please specify a valid category code	The grant category is blank	Enter a grant category or invoke the lookup to select a valid grant category

Srl	Error	Description	Corrective Action
6.	Invalid grant category code. Please enter a valid grant category	The grant category entered is not a valid grant category in EGrAMS	Enter a valid grant category or invoke the lookup to select a valid grant category
7.	Invalid grant program. Please specify a valid grant program	The grant program entered is not a valid grant category in EGrAMS	Enter a valid grant program or invoke the lookup to select a valid grant program
8.	Your project director request is pending authorization	The entered user has already submitted a request for the grant program as a project director	A request has already been submitted an additional action is not required from this screen
9.	You have been approved as a project director. You need not make another request	The entered user has already been approved as a project director for the grant program.	The user has already been approved as a project director, an additional action is not required

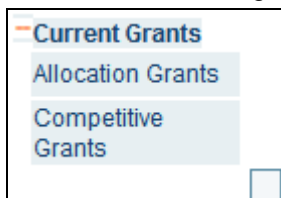
3.1.4 Current Grants

EGrAMS displays a categorized listing of available grant programs on the Home Page. You are not required to have a user account to be able to access this functionality.

To access this functionality, click on the highlighted link on the EGrAMS Home Page:



Click on +Current Grants link. The system expands the link to display the available grant categories, as shown in the following example:



Click on the required grant category to see the available grant programs.

In the example above, on selection of 'Competitive Grants', the system displays the following screen:

The screenshot shows the 'Grant Register' application interface. The top navigation bar includes 'Home', 'About EGrAMS', 'EGrAMS Login', 'Grant Opportunity Notification', 'Register your Agency', 'Create User Profile', 'Project Director Request', 'Submit Program Questions', 'Register as a Review Volunteer', 'Validate Workstation', 'Search Grants', and an expanded 'Current Grants' menu with 'Allocation Grants' and 'Competitive Grants'. The 'Competitive Grants' option is selected. The main content area shows a table of grant programs with the following data:

Program	Description	Effective From Date	Effective To Date	Submission Date	Avl Grant Amount
CGO-11	Competitive Open-Call Grant - 2011	1/1/2011	12/31/2011	N/A	7,607,799.00
CGD-12	Competitive Deadline based Grant - 2012	1/1/2011	12/31/2011	10/20/2010	942,724.00
CGD-11	Competitive Deadline based Grant - 2011	1/1/2011	12/31/2011	10/9/2010	942,724.00

At the bottom of the screen, there is a 'Comment Line:' input field.

The search results on this screen are color coded:

- Green - grant programs that are still open and the application submission deadline has not yet passed
- Amber - grant programs which are open but past their application submission deadline
- Red - grant programs that are closed. Closed programs are displayed only if the search option selected is 'All.'
- Black - grant programs that do not have an application submission deadline (open-call programs).

The above screen is a display only screen that displays the available grant programs for the selected grant category. To view details of the grant program, click on the program hyperlink (in this case CDG-11).

On click of the program hyperlink, the system will display the grant program details as follows.

View Synopsis Date: Dec-23-10

[Print](#) [Close](#)

[User Documents](#) [Show](#) [View EGrAMS Application Form](#)

Grant Category: Grant Program:

Synopsis

The XYZ Foundation is a statewide membership organization dedicated to protecting, enhancing and advocating for the local community. Since its inception in 1969, XYZ has raised over \$160 million to benefit the community.

As an extension of its mission, XYZ offers competitive grants to benefit our local communities and to support the Department's mission. Qualified non-profit groups are encouraged to apply.

Timeline

RFP Publication Date: Submission Date / Time:

Approval Date: Min. Requested Amount: Max. Requested Amount:

Tech Assistance Session

Sess	Type	Venue	City	Date	From	To	Map
2	Technical Assis	Conference Room # 206	Troy	10/11/2010	02:00 PM	04:30 PM	

Contacts

Name	eMail	Telephone
Clark Flynn	Cflynn@htcinc.com	(248) 786-2500 154

The above screen is a display only screen and consists of five sections

1. Program Documents
2. Program Synopsis
3. Program Timeline
4. Technical Assistance Sessions
5. Contacts

3.1.4.1 Program Documents

The Program Documents section consists of two links

3.1.4.1.1 User Documents

Clicking on the **Show** link (toggle Show/Hide) displays various attachments (cover letter, instructions, etc) from the implementing agency.

The screenshot shows a web interface with a blue header bar containing 'View Synopsis', a help icon, and a date 'Date: Sep-08-10'. Below the header is a 'Print' button. The main content area has 'User Documents Hide' and a link 'View EGrAMS Application Form' with a 'Close' button. A table lists documents with columns for 'Document Name', 'Updated', and 'Last Update'.

Document Name	Updated	Last Update
Request for Grant Applications (RGA) Instructions	<input type="checkbox"/>	
Budget Template and Instructions	<input type="checkbox"/>	
Response to Queries	<input checked="" type="checkbox"/>	Aug-03-10

Click on the link of the document title to View / Print details of the respective document. You are encouraged to review the various documents and print them for your reference.

3.1.4.1.2 View EGrAMS Application Form

Selecting view EGrAMS application form will display the grant application form in PDF format. A sample of the first page of the application form is displayed below. (You need to have Adobe Acrobat Reader to open the form).

Facesheet for Competitive Deadline based Grant - 2011 9/30/2010

Application Preview

Organization Information
(Carefully read the instructions before completing this form)

1. Organization Information

a. Organization Name
 b. Organizational Unit
 c. Address
 e. City State Zip
 f. Federal Id Number DUNS Number
 g. Organization fiscal year (begining month and day)
 h. Agency Type (Please check one)
 Private, Non-Profit For-Profit Public
 UNIVERSITY

2. Project Information

a. Project Name
 b. Is implementing agency same as Organization (Please select Yes or No) Yes No
 c. Implementing Agency Name
 Address
 City State Zip
 Phone Fax
 d. Amount of Funds Requested Project Cost
 f. Number of Participants: _____
 g. Average Cost per Participant: _____

You may print the form by selecting the print icon as follows (marked in red).



You may also save the form to your local system by selecting the Save icon as follows (marked in red).



3.1.4.2 Grant Program Information


This section displays the grant category and grant program information. In addition the system also displays a brief synopsis of the grant program.

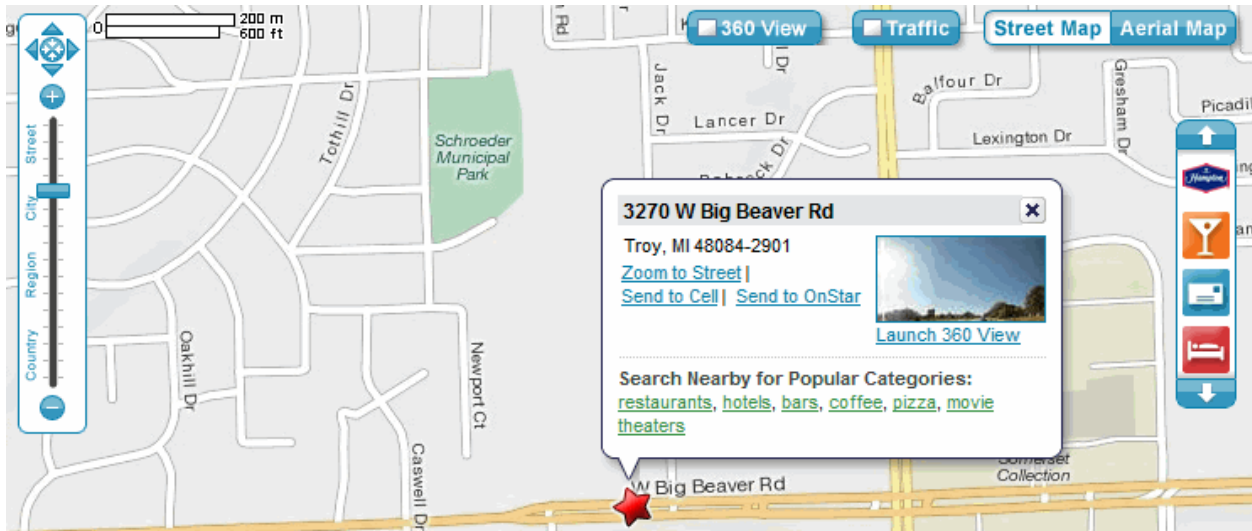
3.1.4.3 Program Timelines

This section displays important dates in the life cycle of the respective grant program for your ready reference.

3.1.4.4 Technical Assistance Sessions

This section displays all the available / planned technical assistance sessions for the respective program. Some of the programs mandate attendance to the technical assistance sessions. Review the documents under the 'Eligibility' to determine whether attendance to these sessions is mandatory or not. In order to attend a technical assistance session, you will need to register. Refer to 'Project Director Tasks' for details on how to register.

Information displayed includes session number, venue, date and from / to time of the session and a street map. Click on the map icon  to view the street address as follows.



3.1.4.5 Contacts

This section lists the various grantor agency contacts for the respective grant program.

Contacts		
Name	eMail	Telephone
Clark Flynn	Cflynn@htcinc.com	(248) 786-2500 154

Select the 'Close' option to close the popup window and return to the main screen.

3.1.5 Search Grants

EGrAMS facilitates a comprehensive search (including full-text search) for available grant programs. The search can be triggered by clicking on the 'Search Grants' link on the EGrAMS Home Page. You are not required to have an account in the EGrAMS system to be able to access this feature and search for grants.

To access this functionality, click on the highlighted link on the EGrAMS Home Page:



An example of this screen has been shown below:

Search Grant Opportunities

Keyword:
(Use * as wildcard. AND, OR to separate words. Enclose exact phrases in "double quotes")

Office/Bureau: ...

Funding Category: ...

Grant Type: Competitive Formula/Allocation Designated Agreements Other All

CFDA Number: ...

Funding Opp. Number

(Set up Sort options by entering the order the results will be sorted, e.g. 1,2,3..)

Sort By	Field Name
<input type="text"/>	Office/Bureau
<input type="text"/>	Funding Category
<input type="text" value="1"/>	Published Date
<input type="text" value="2"/>	Submission Date
<input type="text" value="3"/>	Grant Amount

Published Dates to Search:

Last Week

Last Month

From/To Dates (mm/dd/yyyy)

Application Submission Date (mm/dd/yyyy) >=

Award Amount:

Sort Order: Ascending Descending

The following table provides a description of the contents of this screen:

Srl	Field	Description
1.	Keyword	Search for a grant using keyword. This is a full-text search. The keywords entered are searched for in program description / synopsis. You may use * as a wildcard character for search and operators 'OR' and 'AND' in between the search keywords. For example, the search string "comp* OR Allocation" will display results wherein the grant descriptions contains all words starting with letters 'comp' as well as all grants with the keyword 'Allocation' (not case sensitive).
2.	Office / Bureau	Invoke the lookup to select a grant office / bureau to filter your search
3.	Funding Category	Invoke the lookup to select a funding category to filter your search
4.	Grant Type	Select one from the list of available grant types to filter your search. Selecting 'All' looks for all grant types.
5.	CFDA #	Invoke the lookup to select a CFDA # to filter your search
6.	Funding Opportunity Number	Enter a Funding Opportunity Number to filter your search
7.	Sort Options	These help order the search results displayed. Enter numeric values between 1 and 5 in the fields provided. For example, in the screen shown above, the search results will be displayed by 'Published Date', then by 'Submission Date' and then by 'Grant Amount'. Further, you may select the sort order as 'Ascending' / 'Descending' to order the search results as ascending (default) or descending.
8.	Published dates to search	Select the appropriate option by clicking on the corresponding checkbox (Last week; last month; or custom date range)
9.	Application Submission Date >=	Invoke the calendar lookup to select a date. The system will filter your search to only include grants for which the application submission date is on or after the selected date.
10.	Award Amount	Enter an amount value to filter your search based on grant award.

Enter your search criteria and click on the Find button at the bottom. The system will display the results based on the search criteria as shown in the following screen:

Grant Search Results



Page of 1 go Records 1 to 3 of 3 [Back To Search](#) First ... 1 ... Last


1. RFP Published Date: Jul-26-10 Office/Bureau: Grants Management Program Title: Competitive Deadline based Grant - 2011 CFDA Number: N/A Grant Type: Competitive Grant Amount: 942,724.00 Floor: N/A Ceiling: N/A	Application Submission Date : Oct-09-10 Match Required: Yes(0.00) Funding Opp. Number: Expected Number of Awards: 20
2. RFP Published Date: Jul-26-10 Office/Bureau: Grants Management Program Title: Competitive Open-Call Grant - 2011 CFDA Number: N/A Grant Type: Competitive Grant Amount: 7,607,799.00 Floor: N/A Ceiling: N/A	Application Submission Date : Oct-31-11 Match Required: Yes(0.00) Funding Opp. Number: Expected Number of Awards: N/A
3. RFP Published Date: Jul-26-10 Office/Bureau: Grants Management Program Title: Competitive Deadline based Grant - 2012 CFDA Number: N/A Grant Type: Competitive Grant Amount: 942,724.00 Floor: N/A Ceiling: N/A	Application Submission Date : Oct-20-10 Match Required: Yes(0.00) Funding Opp. Number: Expected Number of Awards: 20

Page of 1 go Records 1 to 3 of 3 [Back To Search](#) First ... 1 ... Last

The above screen provides a listing of grants matching the search criteria, and some basic information about the grant, such as RFP Published date, Application Submission date, CFDA #, Office/Bureau, Match requirements etc. You may click on the icon in the above screen to generate a printable PDF copy of the search results.

The 'Program Title' displayed in the above screen is a hyperlink. Clicking on the hyperlink will display a synopsis of the selected program title as shown below:

View Synopsis   Date: Dec-23-10

 Print

User Documents [Show](#) [View EGrAMS Application Form](#)

Grant Category: Grant Program:

Synopsis

As an extension of its mission, XYZ offers **competitive** grants to benefit our local communities and to support the Department's mission. Qualified non-profit groups are encouraged to apply.


In general (and as funds permit), XYZ grants will be targeted in four main areas: Volunteer Efforts and Recognition; Education and Interpretation; Natural and Cultural Resource Protection; and Capacity Building for cooperating associations. XYZ also makes a number of discretionary grants each year that may fall outside the main target areas.

Timeline

RFP Publication Date: Submission Date / Time:

Approval Date: Min. Requested Amount: Max. Requested Amount:

Tech Assistance Session

Sess	Type	Venue	City	Date	From	To	Map
<input type="text" value="2"/>	<input type="text" value="Technical Assis"/>	<input type="text" value="Conference Room # 206"/>	<input type="text" value="Troy"/>	<input type="text" value="10/11/2010"/>	<input type="text" value="02:00 PM"/>	<input type="text" value="04:30 PM"/>	

Contacts

Name	eMail	Telephone
<input type="text" value="Clark Flynn"/>	<input type="text" value="Cflynn@htcinc.com"/>	<input type="text" value="(248) 786-2500"/> <input type="text" value="154"/>

In the above screen, the search keyword ('comp') is highlighted by the system. Please refer to the section 'Current Grants' for details on the information displayed in this screen.

3.1.6 Submit Program Questions

EGrAMS allows potential applicants to enter and submit questions for the selected grant program online using the system. To submit grant program questions, you need to have an account in the EGrAMS system, but do not require any other specific permissions for the grant program.

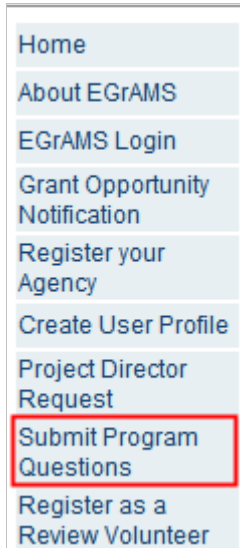
All submitted questions are available for the respective grantor staff for the program to review. Grantor staff, at their discretion may select questions for responses and publish their responses along with the grant program documentation, which can be accessed using the 'Program Synopsis' screen (Refer section [Current Grants](#)).

Depending on the specific EGrAMS implementation, you may or may not require being logged-in to access this functionality.

If you use an external system for authenticating your credentials (such as login name, password), you are required to login to the external system before accessing this functionality.

If you do not use an external system for authentication, you can directly access this link from the EGrAMS Home page, and enter your user account credentials within this screen.

To access this functionality, click on the highlighted link on the EGrAMS Home Page:



EGrAMS Users

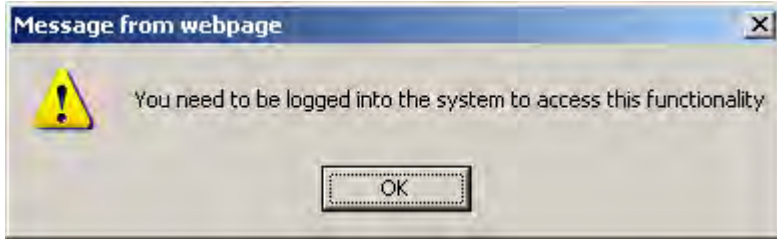
If you use the EGrAMS system to authenticate your user account information, on selection of the Submit Program Questions option, the system will display the screen as shown in the example below:

External Users

If you use an external system to authenticate your user account information, log into the external system and navigate to the EGrAMS Home Page. On selection of the Project Director Request option, the system will display the screen as shown in the example below:


In this case, the system does not display the Login name and password fields on the screen and is pre-populated with your name and parent agency from the user profile created in the EGrAMS system.

If you try to access this screen without logging into the external system first, or if you have not yet saved your profile information in EGrAMS, the system will display the following error message:



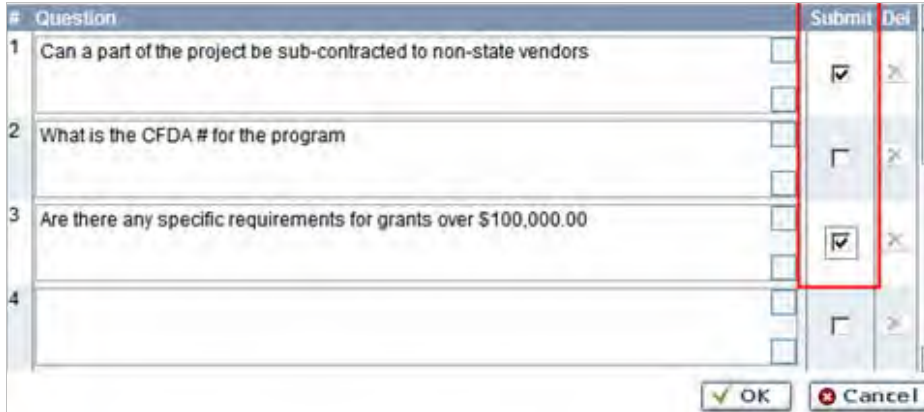
3.1.6.1 Submit Questions

The following table provides a description of the contents of this screen:

Srl	Field	Description
1.	EGrAMS Login Name **	Enter your EGrAMS login / user name.
2.	Password **	Enter the password associated with your user account in the EGrAMS system, and hit the <Enter> or <Tab> key on your keyboard.
3.	Agency	Displayed by the system based on the parent agency information saved in your user profile, after your login credentials have been authenticated.
4.	Grant Program	Invoke the lookup to select a grant program for which you intend to enter / submit question(s).
5.	Status	Select from the following: New Selecting 'New' displays a blank screen with a provision to enter up to 10 new questions. For each question entered you have the option to select it for submission or not. The questions that are entered in the 'New' mode, but not submitted may be submitted by selecting 'All' at a later point. All Selecting 'All' displays the list of questions that have already been entered or submitted. The questions that have been entered but not submitted can be submitted by checking the 'Submit' checkbox and clicking OK.
6.	Question	Enter up to 10 questions (at a time) for the selected grant program. Additional questions may be entered by re-activating this screen from the menu and selecting the Status as 'New'.
7.	Submit	<input checked="" type="checkbox"/> - If you want to submit the corresponding question. <input type="checkbox"/> - If you do not want to submit the question at this time. (It can be submitted later by selecting the Status as 'All', instead of 'New')
8.	Delete	Click on the  icon to delete the corresponding question. Note that the delete link is activated only after the question has been saved.

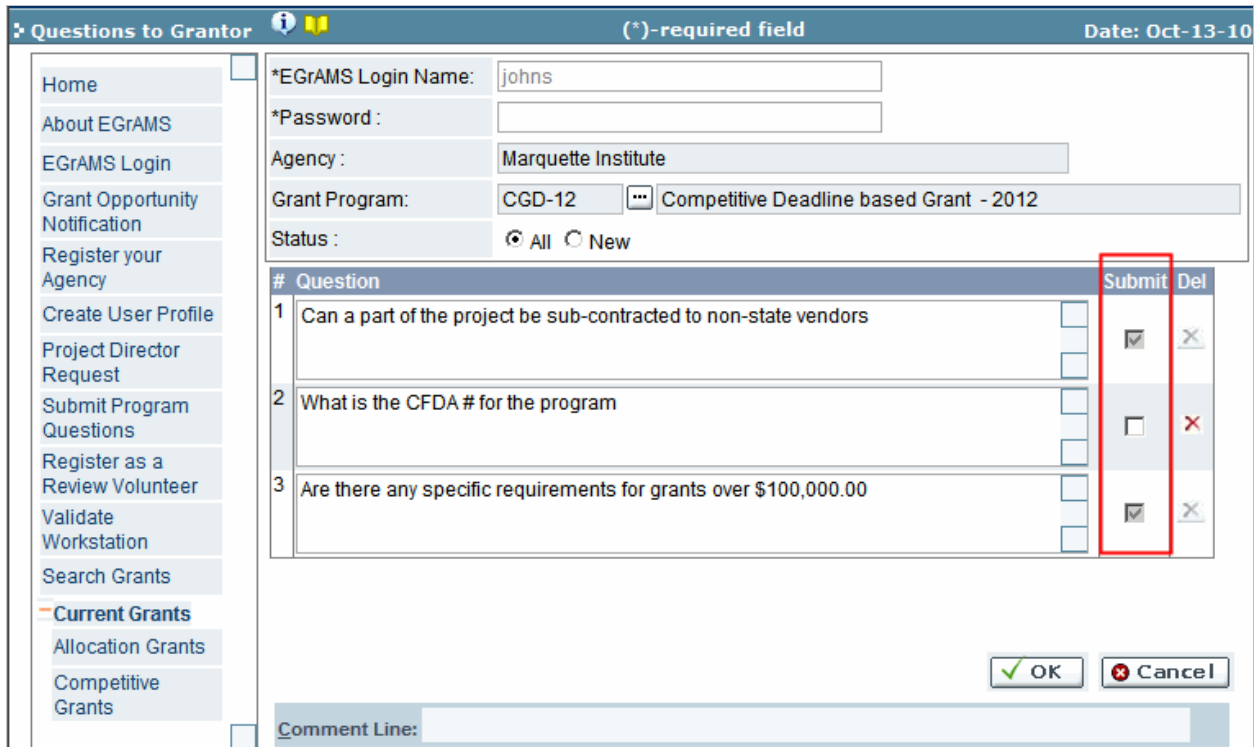
** - Field not applicable for users that have been authenticated by an external system

An example of the program question submission functionality has been shown in the following screen:



In the screen shown above, questions 1 and 3 have been marked for submission, while question 2 has not been marked. With the current selection click the OK button. The system displays the following information message: "Records saved. Selected questions submitted."

Click 'OK' in the information message above, the system displays the screen with the status as 'All'. (Alternatively, you may click on the 'Submit Program Questions' link on the home page and re-enter the username, password and grant program and select 'Status' as 'All'). The system displays the following screen:



In the above screen, the system displays the question status as submitted () or not submitted (). For the questions that have not been submitted, you may optionally change / edit the question, select the 'Submit' checkbox and click the OK button. The system saves the edited information and submits the selected question and displays the following information message: "Records saved. Selected questions submitted."

3.2 Administration Tasks

A Local Administrator / Project Director is a person from the grantee agency who is responsible for performing certain administrative tasks within his or her agency. The Project Director is responsible for registering his or her agency in EGrAMS, granting access to users to grant applications within their grantee agency, submitting grant applications and progress reports.

The following administration tasks associated with the grantee user role have been described in this section:

- Agency Information
- Agency Additional Information
- Start New Application
- Technical Assistance Registration
- View Application Status
- View Email Log
- Select Local Council
- Request Multiple Agency Access

3.2.1 Agency Information

All agencies need to have their agency information created in the EGrAMS system. This information needs to be entered only once and is created using the 'Register Your Agency' link on the EGrAMS Home Page. After an agency has been created, there may be a need to update profile information, such as agency address, contact information etc. This screen allows authorized users to review and change their agency information in the EGrAMS system.

To access this functionality, navigate to the following:

Grantee → Administration → Agency Information

The Agency Information Screen supports the following modes:



1. Change – Allows you to make changes to your agency profile information
2. Review – Allows you to view agency profile information.

3.2.1.1 Change

Select the 'Change' mode and click on 'Find' to view the details of your agency.

Grantee Agency (*)-required field Timeout Left: 60 mins Date: Oct-22-10

Change **Review**

Agency Information

*Federal ID. & Agency Name: 92-0158003 Marquette Institute

DUNS Number: AEC07269 Vendor Reference:

*Address Line 1: P.O. Box 4006 Address Line 2:

*City: Marquette *State: MI *Zip: 49855

Website: www.marquette-i.org

Faith Based: Yes No MI based business: Yes No

*Agency Type: PUB Public Agency Sub-Type: OTH Others

Contact Information

*Contact Person: Loretta Knudson-Spalding *Email: contact@marquette-i.org

*Phone: (906) 226-0044 Ext: Fax:

Mailing Address Same: Yes

*Code	*County	*Primary
<input checked="" type="checkbox"/>	001 Alcona	<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>

Contract Type Information (For Office use only)

Contract Type : Master Comprehensive Group N/A

Contract Applicability : Program Agency N/A

Contract Template :

Amendment Applicability : Program Agency N/A

Amendment Template :

Find **OK** **Cancel**

The screen comprises of four segments

1. General Information
2. Contact Information
3. County Information
4. Contract Type Information

3.2.1.1.1 Agency Information


This section is used to enter the general information of the agency. The following table provides a description of the contents of this section:

Srl	Field	Description
1.	Federal Id	Displayed by the system, cannot be changed.
2.	Agency Name	Displayed by the system. Change your agency name, if required.
3.	DUNS Number	Displayed by the system if available. If your agency has a valid DUNS number, enter the agency DUNS number. This information may or may not be entered
4.	Organizational Unit / Vendor Reference	Displayed by the system if available. This information may or may not be entered
5.	Address Line 1	Displayed by the system. Change your agency street address, if required

Srl	Field	Description
6.	Address Line 2	Displayed by the system. Enter Suite or P.O Box Number. This information may or may not be entered
7.	City	Displayed by the system. Enter the city in where your agency is located
8.	State	Displayed by the system. Enter the State your agency is in. You may invoke the lookup the select the desired state
9.	Zip	Displayed by the system. Enter 5 digit zip code and 4 digit zip extension, if available
10.	Website	Displayed by the system, if available. Enter your agency website URL, if available. This information may or may not be entered
11.	Agency Type	Displayed by the system. Enter your agency type. You may invoke the lookup the select the desired agency type
12.	Agency Sub-Type	Displayed by the system. Enter your agency sub-type. You may invoke the lookup the select the desired agency sub-type. This information may or may not be entered

3.2.1.1.2 Contact Information

This section is used to enter the agency primary contact information. The following table provides a description of the contents of this section:

Srl	Field	Description
1.	Contact Person	Displayed by the system. Enter your agency primary contact person's name
2.	Email	Displayed by the system. Enter your agency primary contact person's email address
3.	Phone	Displayed by the system. Enter your agency primary contact person's phone number
4.	Fax	Displayed by the system. Enter your agency primary contact person's fax number. This information may or may not be entered.
5.	Mailing Address Same?	Yes may be checked, or the contact mailing address may be entered by clicking on the  icon. This information may or may not be entered.

3.2.1.1.3 County Information

This section is used to enter the county(ies) serviced by the agency. The following table provides a description of the contents of this section:

Srl	Field	Description
1.	Code	Displayed by the system. Enter the county code. You may invoke the lookup the select the desired county
2.	County	County description displayed by the system
3.	Primary	Displayed by the system. Select the checkbox if the respective county is the primary county for the agency.

Srl	Field	Description
		Only one county should be marked as a primary county for an agency

3.2.1.1.4 Contract Type Information

This section is display-only and can be entered / edited only by authorized implementing / grantor agency users.

Click on **'OK'** to save your agency information.

Click on **'Cancel'** to clear the fields on the screen.

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

Srl	Error	Description	Corrective Action
1.	Agency description cannot be empty	The agency name is blank	Enter the agency name
2.	Address Line 1 is blank	The street address is blank	Enter your agency street address
3.	Please enter the City	City is blank	Entry the city in which your agency is located
4.	Please enter the State	State is blank	Enter the state your agency is in. Invoke the lookup the select the desired state
5.	Please enter Zip Code	The 5 digit zip code is blank	Enter a 5 digit zip code
6.	Select an agency type	The agency type is blank	Enter an agency type. Invoke the lookup to select the desired agency type
7.	The agency type you entered does not exist	The agency type entered is not valid	Enter a valid agency type or invoke the lookup to select the valid agency type
8.	Please enter the contact name	The contact name is blank	Enter the agency primary contact person's name
9.	Email is empty	The email address is blank	Enter a valid email address
10.	Invalid Email! Enter a valid email address	The email you entered does not meet the email address standards validated by the system	Enter a valid email address
11.	Phone cannot be empty	The telephone number is blank	Enter a 10 digit telephone number with the area code, no spaces
12.	Please provide a 10 digit phone number	The phone number you entered does not meet the phone number	Enter a 10 digit telephone number with

Srl	Error	Description	Corrective Action
		validation.	the area code, no spaces
13.	The county entered does not exist	The county code entered is invalid	Enter a valid county code on invoke the lookup to select a valid county code
14.	You must select one county as your primary county	Checkbox under Primary has not been selected	Mark one county as the primary county

3.2.1.2 Review

Select Review mode to view your agency information. No changes can be made to agency information in review mode.

3.2.2 Agency Additional Information

Agency additional information can be stored in the system using this option. The additional information that may be added includes Agency Contacts information, agency documentation such as business license, non-profit status certificate etc, and Demographic information such as School District, State House & Senate and US Congressional district.

To access this functionality navigate to the following:

Grantee → Administration → Agency Addl Info

The Agency Additional Information Screen supports the following modes:



1. Change – Allows you to make changes to your agency additional information
2. Review – Allows you to view agency additional information.

The contents of this screen have been categorized under three separate tabs:

1. Contact Information – Allows you to view / edit agency contacts.
2. Attachments – Allows you to view / edit agency attachments and reference numbers
3. Demographic Information - Allows you to view / edit agency demographic information under categories – School District, State House & Senate and US Congressional district.

3.2.2.1 Change

Select the 'Change' mode to make any changes in the agency additional information. Your agency information is pre-populated based on your parent agency in the user profile information. Click on 'Find' to retrieve the agency additional information details.

An example of this screen in the 'Change' mode has been shown below:

Grantee Agency (*)-required field Timeout Left: 60 mins Date: Oct-13-10

Change Review

Select Search Parameters

*Federal ID:

Contact Information Attachments Demographic

	Del.	Contact Type	Users	Contact Name	Telephone	Add. Info.
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Financial Offic	mike andrews	mike andrews	(248) 569-4711 Ext: <input type="text"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Project Directc	Jane Roe	Jane Roe	(313) 222-3333 Ext: <input type="text"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Authorized Offi	Matt Lakers	Matt Lakers	(786) 888-9999 Ext: <input type="text"/>	
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>		<input type="text"/> Ext: <input type="text"/>	
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>		<input type="text"/> Ext: <input type="text"/>	
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>		<input type="text"/> Ext: <input type="text"/>	
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>		<input type="text"/> Ext: <input type="text"/>	
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>		<input type="text"/> Ext: <input type="text"/>	
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>		<input type="text"/> Ext: <input type="text"/>	
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>		<input type="text"/> Ext: <input type="text"/>	

OK Cancel

In the above screen, clicking on each of the tabs displays its details, allowing you to review and edit information, including deleting existing records, making changes to the existing records and adding new records.

3.2.2.1.1 Contact Information

This section is used to change the contact information for the agency.

Srl	Field	Description
1.	Delete	Click on the <input checked="" type="checkbox"/> link to delete the corresponding contact from agency's contact information.
2.	Contact Type	Invoke the contact type lookup to select a value from the list of configured contact types
3.	Users	Invoke the 'Users' lookup to select a user from the user accounts in the system for your agency.
4.	Contact Name	Displayed by the system from user profile information
5.	Telephone	Displayed by the system from user profile information
6.	Phone Extension	Displayed by the system from user profile information
7.	Additional Contact Information	Click on the icon to view additional information for the selected contact. The system displays the following additional information for the selected contact:

Srl	Field	Description
		<ul style="list-style-type: none"> ➤ Name (Read-only) ➤ Address Line 1 ➤ Address Line 2 ➤ City ➤ State ➤ Zip + Extension ➤ Fax ➤ Email ➤ Designation <p>If the contact was selected using the Users lookup, the system pre-populates the available information from the selected user's profile.</p> <p>If the contact was not selected using the Users lookup, the system populates the address information from the selected user's parent agency.</p> <p>In both cases, you have the option to edit information as required.</p>

3.2.2.1.2 Attachments





An example of the attachments tab has been shown below:

The screenshot displays the 'Attachments' tab in the EGrAMS system. At the top, there are buttons for 'Change' and 'Review'. Below that is a search section with 'Federal ID: 92-0026774' and 'Flint Institute'. The main area is a table with the following columns: Del., Attachment Type, Ref No, Valid From, Valid To, Attachment File, View, Notes, and Status. The table contains three rows of data:

Del.	Attachment Type	Ref No	Valid From	Valid To	Attachment File	View	Notes	Status
<input type="checkbox"/>	501@3 Status	C001-IRS-0	10/01/2010	09/30/2011	Browse...			Rejected
<input type="checkbox"/>	Audit Statement	AUD-01-201	04/01/2010	03/31/2011	Browse...			Pending
<input type="checkbox"/>	Unduplicated C...				Browse...			Pending

At the bottom right of the table area, there are 'OK' and 'Cancel' buttons.

This section of the screen is used to enter agency attachments.

Srl	Field	Description
1.	Delete	Click on the  link to delete the corresponding attachment from agency's attachment information.
2.	Attachment Type	Invoke the attachment type lookup to select from the list of attachment types configured
3.	Reference Number	Enter a document reference number. This field is enabled / disabled for data entry based on the attachment type selected and applicability of a reference number for the attachment type.
4.	Valid From	Invoke the calendar lookup to select the date that the corresponding document is valid from. This field is enabled / disabled for data entry based on the attachment type selected and applicability of validity start date for the attachment type.
5.	Valid To	Invoke the calendar lookup to select the date that the corresponding document is valid to. This field is enabled / disabled for data entry based on the attachment type selected and applicability of validity end date for the attachment type.
6.	Attachment File	Click on the Browse button to select a file to be attached for the corresponding attachment type.
7.	View	Click on the  icon to view the corresponding file in its respective editor (for example MS Word, Adobe PDF ...)
8.	Notes	Click on the  icon to view any rejection notes entered by the authorized grantor staff for the corresponding document. Note that this link is enabled only if the document has been rejected. If not, the link is disabled ().
9.	Status	Displayed by the system. The values are: Pending, Approved, Rejected

3.2.2.1.3 Demographic Information

An example of the Demographic information tab has been shown below:

The screenshot shows the 'Demographic' tab in the EGrAMS application. At the top, there are buttons for 'Change' and 'Review'. Below that, search parameters are entered: '*Federal ID: 92-0026774' and 'Flint Institute'. The 'Demographic' section is active, showing a list of 'School District' entries. Each entry has a checkbox, a delete icon (X), a text input field, and a dropdown menu. The first four entries are: 01010 Alcona Community Schools, 02010 AuTrain-Onota Public Schools, 05040 Bellaire Public Schools, and 08000 Barry ISD. Below this list are three collapsed sections: 'State House', 'State Senate', and 'US Congress', each with a '+' icon to expand.

In the above screen, each demographic category (School District, State House...) is a collapsible section. Click on the adjacent + icon to expand the section and the - icon to collapse an expanded section (School District in the above example).

For each of the sections, the system provides a corresponding lookup to select from the configured list of values. The initial number of entries that can be made for each demographic category is 10. If you need to enter more than 10 rows for any of the categories, click on 'OK' to save the information entered and go back to the same screen. The system will generate 5 new blank rows for data entry. This is a repetitive process to allow you to enter the required number of rows.

This section is used to enter the demographic information for each of the categories as follows:

Srl	Field	Description
1.	Delete	Click on the X link to delete the corresponding attachment from agency's attachment information.
2.	Demographic region (School District / State House / State Senate / US Congress)	Invoke the respective lookup to select from the list of configured values




Click on 'OK' to save your information. Click on 'Cancel' to clear the fields on the screen.




3.2.2.2 Review



In 'Review' mode, the system displays information already saved. You cannot make any changes in this mode.

3.2.2.3 Errors

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

Srl	Error	Description	Corrective Action
Contact Information			
1.	Row <number> - Contact Type cannot be empty	Contact type has not been selected	Invoke the contact type lookup to select a contact type
2.	Row <number> - First name cannot be empty	Contact name has not been selected	Invoke the Users lookup to select a contact person, or enter the contact person name in the Contact Name column
3.	Row <number> - Phone cannot be empty	Contact phone has not been selected	Enter a phone number for the contact person. If the contact person is selected using the lookup, the system automatically populates the phone number from the user's profile information.
4.	Row <number> - Address 1 is empty	Contact address has not been selected	Click on the  icon to enter address for the contact person. If the contact person is selected using the lookup, the system automatically populates the address from the user's profile information.
5.	City is empty	In the popup window for the contact, a city has not been entered	Click on the  icon to enter city for the contact person. If the contact person is selected using the lookup, the system automatically populates this field from the user's profile information.
6.	State is empty	In the popup window for the contact, a State has not been selected	Click on the  icon to invoke the state lookup and select a state for the contact person. If the contact person is

Srl	Error	Description	Corrective Action
			selected using the lookup, the system automatically populates this field from the user's profile information.
7.	Zip 1 is empty	In the popup window for the contact, a zip code has not been entered	Click on the  icon to enter zip code for the contact person. If the contact person is selected using the lookup, the system automatically populates this field from the user's profile information.
8.	Email is empty	In the popup window for the contact, an email address has not been entered	Click on the  icon to enter email address for the contact person. If the contact person is selected using the lookup, the system automatically populates this field from the user's profile information.
9.	Invalid! Enter a valid e-mail ID	In the popup window for the contact, the email address entered is not valid	Enter a valid email address in this field. . If the contact person is selected using the lookup, the system automatically populates this field from the user's profile information.
10.	User Designation is empty	In the popup window for the contact, user designation not been selected	Click on the  icon to invoke the lookup and select a designation for the contact person. If the contact person is selected using the lookup, the system automatically populates this field from the user's profile information.
Attachments			
11.	Row <number> - Please select file for the attachment type	A file has not been selected for upload.	Click on the browse button for the current

Srl	Error	Description	Corrective Action
			row number and select a file to be attached.
12.	Row <number> - Please select a reference number for the attachment type : <type>	A reference number has not been entered.	Enter a reference number for the attachment in the current row.
13.	Row <number> - Please select validity 'From Date' for the attachment type : <type>	A validity from date has not been entered	Enter or invoke the calendar lookup to select a date for the current row.
14.	Row <number> - Please select validity 'To Date' for the attachment type : <type>	A validity 'to date' has not been entered	Enter or invoke the calendar lookup to select a date for the current row.
15.	Row <number> - 'To Date' must be a date later than the 'From Date'.	The attachment validity 'To date' must be greater than the 'From Date'	Enter or invoke the calendar lookup to select appropriate values for 'From Date' and 'To Date' for the current row.
16.	Row <number> - Duplicate entry found for this attachment type : <type>.	The indicated attachment type has been selected more than once	Invoke the lookup to update the duplicate entry, or use the  icon to delete the duplicate entry.
Demographic Information			
17.	<Demographic Category> : Row <number> Duplicate entry found for this code : <code>	The same lookup value has been selected more than once for the indicated demographic category (School District, State House etc.)	Invoke the lookup to update the duplicate entry, or use the  icon to delete the duplicate entry.

3.2.3 Start New Application

EGrAMS provides the functionality for authorized grantee users (such as Project Directors) to initiate / start new grant applications, based on their approval status for the selected grant program. This option allows the project director to:

1. Enter a title for the project for which the agency plans to submit grant application
2. Grant Read / Write access to users from the applicant agency for the grant application initiated.

To access this functionality navigate to the following:

Grantee → Administration → Start a New Application

The screen is divided into two sections viz. Header and Project information. It supports the following modes:




1. Add – allows you to initiate a new grant application. You need to initiate a grant application before assigning users.
2. Change – Allows you to change your project description
3. Delete – Allows you to delete your grant application
4. Review – Allows you to view the available grant application projects. In addition, it also allows you to view your agency users assigned to the grant application

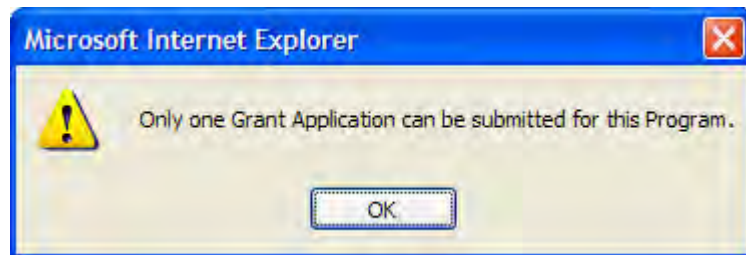
Click on the desired mode to perform the required operation.

3.2.3.1 Create a new Application

Select **Add mode** to add / initiate a new grant application. Enter the header information as follows.

Srl	Field	Description
1.	Grant Program	Invoke the lookup to view the available grant programs and select the desired program for which you would like to initiate a new grant application.  <i>If you do not see any programs in the lookup, you may not be a project director and hence not authorized to initiate a grant application.</i>
2.	Agency	Based on your user login, the system automatically displays your agency federal id and agency name

Some grant programs allow only one grant application from each grantee agency. In that case, on selection of the grant program, the following information message will be displayed.



If the program allows multiple applications to be submitted, the following screen will be displayed

Program Application Setup Timeout Left: 60 mins Date: Sep-30-10

Specify your search criteria below and Click Find..

Grant Program : Competitive Deadline based Grant - 2011

Agency : Marquette Institute

Project Code	Project Title	Assign To Users
<input type="checkbox"/>	<input type="text"/>	<input type="button" value="Assign"/>
<input type="checkbox"/>	<input type="text"/>	<input type="button" value="Assign"/>
<input type="checkbox"/>	<input type="text"/>	<input type="button" value="Assign"/>
<input type="checkbox"/>	<input type="text"/>	<input type="button" value="Assign"/>
<input type="checkbox"/>	<input type="text"/>	<input type="button" value="Assign"/>
<input type="checkbox"/>	<input type="text"/>	<input type="button" value="Assign"/>
<input type="checkbox"/>	<input type="text"/>	<input type="button" value="Assign"/>
<input type="checkbox"/>	<input type="text"/>	<input type="button" value="Assign"/>
<input type="checkbox"/>	<input type="text"/>	<input type="button" value="Assign"/>
<input type="checkbox"/>	<input type="text"/>	<input type="button" value="Assign"/>

Comment Line:

3.2.3.1.1 Project Information

This section allows you to enter one or more rows of your project information.

Enter the project information as follows


Srl	Field	Description
1.	Project Code	Enter a project code. This may be an abbreviation for the project title. You need to limit the project code to 10 characters.
2.	Project Title	Enter the description of the project for the grant application you wish to initiate. Limit your description to 80 characters.
3.	Assign Button	Select 'Assign' to assign users to a grant application

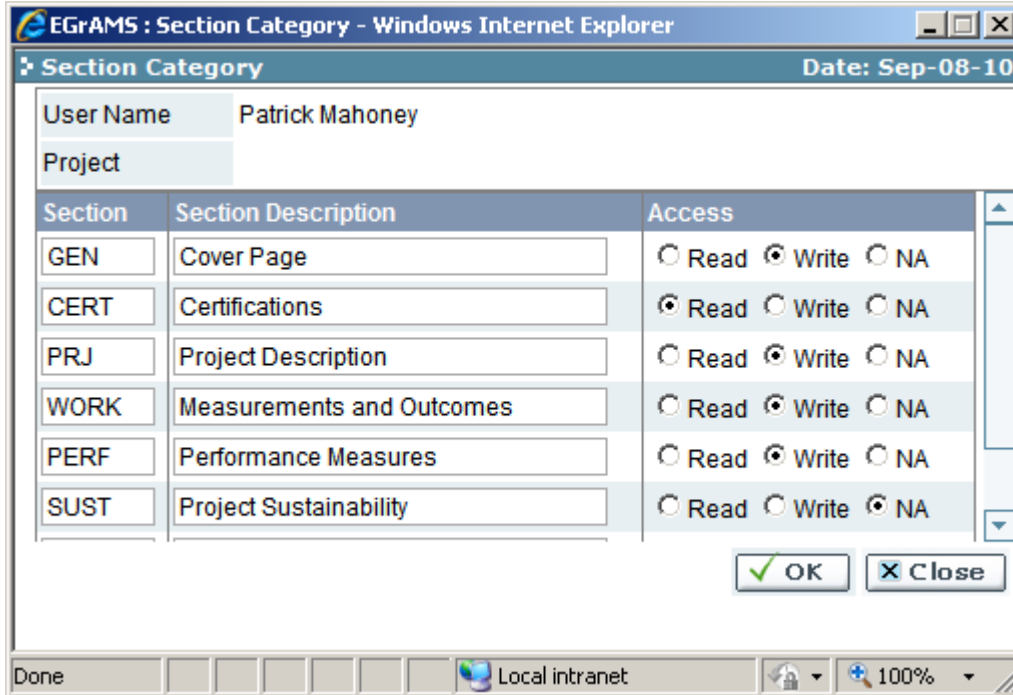
Clicking on the Assign button will display the following information for the applicant agency users.



Use the above screen to select Permission codes by invoking the lookup and check 'Appl' checkbox if section level access is applicable for the respective user.

Srl	Field	Description
1.	Login Id	Displayed by the system
2.	User Name	Displayed by the system
3.	User Status	User status is displayed by the system. If the user status is 'Inactive', you may select 'Active' by checking the corresponding checkbox.
4.	User Role	Displayed by the system
5.	Perm Code	Invoke the lookup to view the valid permission codes. Select the appropriate permission code for the respective user. Permission description displayed by the system.
6.	Section level applicability (Appl)	Check if the user is to be assigned Read/Write/No access to specific sections within the application. If this box is unchecked for a particular user, the user will have write permissions to all sections of the selected application.
7.	Section category applicability (Cat)	This option restricts user access to specific grant application sections. By default a user assigned to a grant application has access to all sections.
8.	Perm Status	Active / Inactive. The users will require an active Perm status in order to access the application.

To restrict access for a user to limited sections of the grant application, click on 'Cat'. On selection of 'Cat'  the system will display the following screen.



Select the option against respective sections to which you would like to grant access. Click on 'OK' to close this window and return to the main screen.

Click on 'OK' on the main screen to save the application and user access information.



Users will not be able to access a grant application unless they have granted access to it by the project director.

3.2.3.2 Change

Select Change mode to change or modify project information. Enter the header information as described for 'Add' mode. On click of the 'Find' button at the bottom of your screen, the system displays the available grant applications / projects for the selected program as follows.

Program Application Setup Timeout Left: 60 mins Date: Sep-30-10

Specify your search criteria below and Click Find..

Grant Program :

Agency :

Project Code	Project Title	Assign To Users
<input type="checkbox"/> CGD-11	<input type="text" value="Competitive Deadline based Grant - 2011"/>	<input type="button" value="Assign"/>
<input type="checkbox"/> CGD-001	<input type="text" value="Application for Comp Grant"/>	<input type="button" value="Assign"/>

The project information is displayed by the system. You may change the project information as required. You may also click on the Assign button to change any of the user permissions. Click on 'OK' to save your changes, or 'Cancel' to discard your changes.

3.2.3.3 Delete

Select Delete mode to delete project information. Enter the header information as in Add mode. On click on the 'Find' button at the bottom of your screen, the system displays the available grant applications / projects for the selected program as follows.

Program Application Setup Timeout Left: 60 mins Date: Sep-30-10

Specify your search criteria below and Click Find..

Grant Program : CGD-11 Competitive Deadline based Grant - 2011

Agency : 92-0158003 Marquette Institute

Project Code	Project Title	Assign To Users
<input type="checkbox"/> CGD-11	Competitive Deadline based Grant - 2011	<input type="button" value="Assign"/>
<input checked="" type="checkbox"/> CGD-001	Application for Comp Grant	<input type="button" value="Assign"/>

Mark the checkbox of the record to be deleted in the left corner of the respective row (marked in red). Click on 'OK' to delete your project information. Click on 'Cancel' to discard the delete operation.



Use Delete with caution. Do not attempt to delete your project for the grant application, once data entry for the grant application has started.

3.2.3.4 Review

Select Review mode to view project information for the selected grant program. In addition to reviewing the project information, user assignment information may also be viewed by clicking on the 'Assign' button. No changes can be made to the project information or the users assigned in Review mode.

3.2.3.5 Errors

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

Srl	Error	Description	Corrective Action
1.	On invoking the grant program lookup, no programs are displayed	Your are not authorized as a project director for any grant programs	Select a different option
2.	Only one grant application can be submitted for this program	Some grant programs support only one grant application from one agency. A grant application	Select another program, mode or option.

Srl	Error	Description	Corrective Action
		project has already been initiated for your agency.	
3.	You cannot add new applications as the submission date has passed	The submission of a grant application for the selected program has passed.	Select another program, mode or option.
4.	Foreign key violation	You are attempting to delete a grant application for which the entry is in progress	Do not delete the selected project / grant application
5.	On selection of the Assign button, the system displays the user assignment screen in Assign mode. However no users are displayed	There are no users from your agency that can be assigned to the grant application	No users in your agency have created their user profile using the 'Create EGrAMS login' Users may not have selected your agency as the parent agency in their user profile

3.2.4 Technical Assistance Registration

EGrAMS provides the functionality for authorized grantee users to register online for technical assistance sessions, if applicable. Some Grant Programs mandate attendance to the technical assistance sessions, whereas it may be optional, or not-applicable for other programs. Review the program documentation to determine whether attendance to these sessions is mandatory or not. This section describes how to register users from your agency for attending technical assistance sessions.

To access this functionality navigate to the following:

Grantee → Administration → Technical Assist Registration

The screen is divided into two sections (header and detail) and supports the following four modes



1. Add – allows you to register users from your agency for a technical assistance session.
2. Change – Allows you to change existing registration information
3. Delete – Allows you to delete users from your agency for a technical assistance session
4. Review – Allows you to view the user registration information for the selected grant program.

Click on the desired mode to perform the required operation.

3.2.4.1 Add

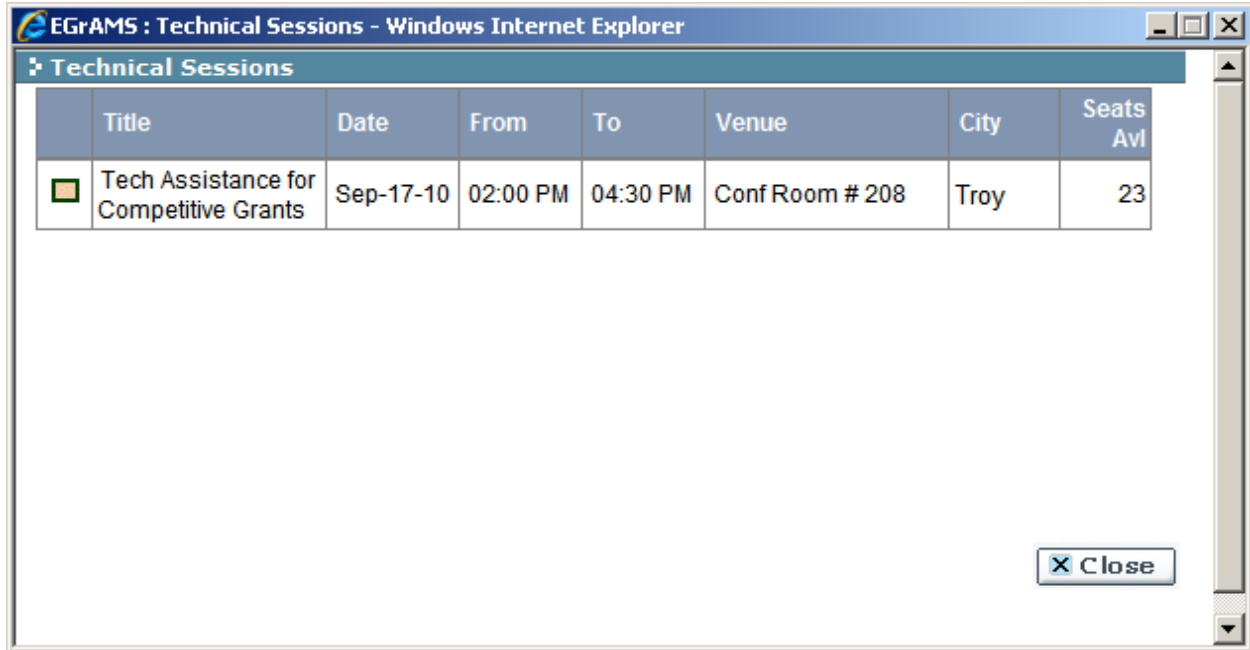
Select the 'Add' mode to register users or members from your agency for technical assistance sessions. You may register any number of users / members from your agency as long as they are within the maximum attendance limits for a single agency for the grant program.

Enter the data in the header section as follows.

Srl	Field	Description
1.	Grant Program	Invoke the lookup to view the grant programs. Select the appropriate grant program. On selection of the grant program, the system displays the grant program description.
2.	Technical Session	Click on 'Sessions' to view the available Technical Assistance Sessions for the grant program. In addition, the system also displays other information (date, from / to time, venue, city and seats available). Select the session you wish to register your users.
3.	Venue	This is a no entry field. Based on the technical assistance session selected, this information is displayed by the system
4.	Seats Available	This is a no entry field. Based on the technical assistance session selected, this information is displayed by the system
5.	Date	This is a no entry field. Based on the technical assistance session selected, this information is displayed by the system
6.	From / To Time	This is a no entry field. Based on the technical assistance session selected, this information is displayed by the system

Srl	Field	Description
7.	City	This is a no entry field. Based on the technical assistance session selected, this information is displayed by the system

On selection of the 'Sessions' button, the system displays the technical sessions for the respective grant program as shown below:



Click on to select the desired session.

In the detail section, you may enter information of the users / members of your agency. Enter the data in the detail section as follows.

Srl	Field	Description
1.	User Login	Invoke the lookup to view the users from your agency and select the desired user.
2.	Name	Displayed by the system.
3.	Email	Displayed by the system
4.	Status	'Register' displayed by default

Click on 'OK' to save the registration details for your agency users. Click on 'Cancel' to discard the registration information.

3.2.4.2 Change

Select the 'Change' mode to change registration information of users or members from your agency for technical assistance sessions. Enter the data in the header section as in Add mode. The system displays all the users registered for the respective technical assistance session as follows.

Technical Assist. Registration Timeout Left: 60 mins Date: Sep-30-10

*Grant Program:

Title: Session Type: Technical Session:

Venue: Seats Avl/Reg:

Date: Time: From/To City:

User	Name	E-mail	Status
<input type="checkbox"/> JohnS	<input type="text" value="John Smith"/>	<input type="text" value="contact@marquette-i.org"/>	<input checked="" type="radio"/> Register <input type="radio"/> Cancel

Comment Line:

You may change the information as required as per guidelines specified in the Add mode.

Click on 'OK' to save changes to the registration details for your agency users. Click on 'Cancel' to discard changes to the registration information.

3.2.4.3 Delete

Select the 'Delete' mode to delete registration information of users or members from your agency for technical assistance sessions. Enter the data in the header section as in Add mode. The system displays all the users registered for the respective technical assistance session as follows.

Technical Assist. Registration Timeout Left: 60 mins Date: Sep-30-10

*Grant Program: CGD-11 Competitive Deadline based Grant - 2011

Title: Tech Assistance for Competitive Grants Session Type: Assistance Session Technical Session:

Venue: Conf Room # 208 Seats Avl/Reg: 25 3

Date: Oct-01-10 Time: From/To 02:00 PM 04:30 PM City: Troy

User	Name	E-mail	Status
<input checked="" type="checkbox"/> JohnS	John Smith	contact@marquette-i.org	<input checked="" type="radio"/> Register <input type="radio"/> Cancel

Comment Line:

Mark the checkbox of the users / members you would like to delete as shown above.

Click on 'OK' to delete the registration details for the selected agency users. Click on 'Cancel' to discard the delete operation.

3.2.4.4 Review

Select Review mode to view registration information for the selected grant program. No changes can be made to the information in Review mode.

3.2.4.5 Errors

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

Srl	Error	Description	Corrective Action
1.	Please enter Grant Program	The grant program field is blank	Enter a valid grant program or invoke the lookup to view and select the required grant program
2.	On invoking the grant program lookup, no programs are displayed	Your are not authorized as a project director for any grant programs	Select a different option OR Register as a Project Director for your agency for the required grant program
3.	Please enter a valid session	Technical Assistance session field is blank	Click on 'Sessions' button to invoke the

Srl	Error	Description	Corrective Action
			lookup and select the desired session
4.	No record is added or changed	No users have been entered for the respective technical assistance session	Enter at least one user for the respective technical assistance session. If you do not wish to register any users, click on 'Cancel'.
5.	Registered participants exceed the attendance restriction of <max number> for your agency	Due to limited seat availability, there may be a restriction on the number of participants that may be registered from each agency.	Ensure that you have not registered participants in excess of <max number>
6.	No records returned for the given criteria. Please update the criteria and search again	Based on the search, no records were found. You may not have entered / registered any users for the selected technical session.	Ensure that all the search criteria are correct.
7.	Session date is already expired. Cannot Add/Change/Delete users	The selected technical assistance session has been completed. No changes can be made to the registration	Select another technical assistance session that has not been completed OR Select 'Review' mode to view details of the respective technical assistance session.

3.2.5 Application Status

After a grant application has been initiated, it goes through several stages during the life cycle of the grant. This screen allows authorized users to check the status of their grant applications at any time. In addition to viewing the application status, a project director can also perform other tasks through the screen. Details are documented in the subsequent sections of this manual.

To access this functionality navigate to the following:

Grantee → Administration → Application Status

An example of the screen has been shown below:

The above screen consists of a header section, where the user can enter their search criteria and a details section that displays the status information of the respective grant application.

Enter the search criteria as follows.

Srl	Field	Description
1.	Grant Program	Invoke the lookup to view the available grant programs and select the desired program On selection of a grant program, the system displays the grant program description
2.	Agency	Based on your user information, the system displays your agency federal id and your agency name
3.	Project	Invoke the lookup the view your agency projects / applications and select the desired project On selection of a project / application, the system displays the project description If you wish to see the status of all your applications, you may leave the field blank.

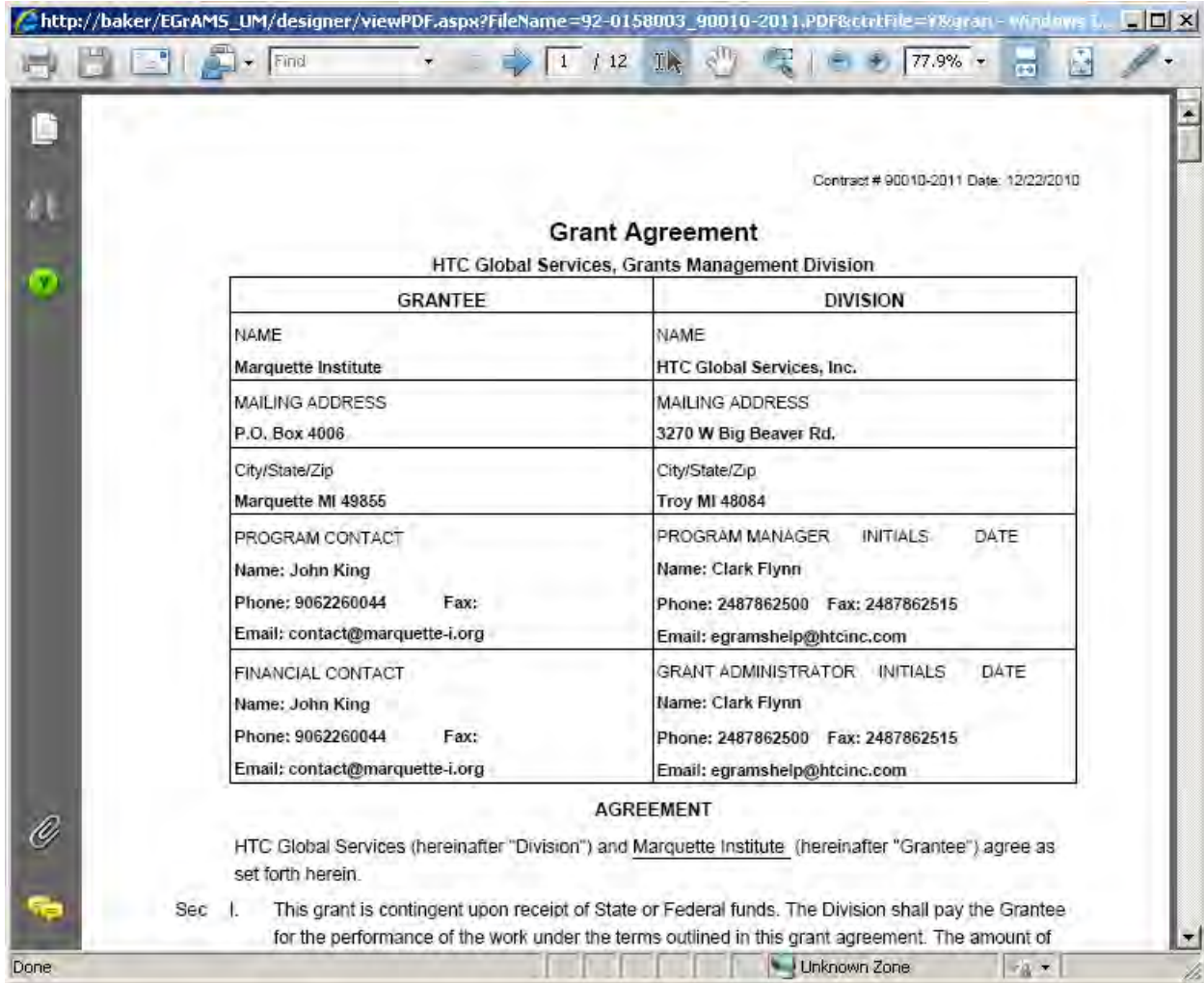
Click on 'Find' at the bottom of your screen to see the status details of your grant application.

If you did not enter your project / application code, the system will display the status of all your grant applications for the respective grant program. Use the « ‹ › » buttons to navigate and view the status of individual grant applications.

Listed below are the details of your application status:

Srl	Field	Description
1.	Requested Amount	This information is displayed from the face sheet. If you see it as 0's you may not have entered the information in your face sheet.
2.	Project Amount	This information is displayed from the face sheet. If you see it as 0's you may not have entered the information in your face sheet.
3.	Recommended Amount	This information is displayed after a grant application has been reviewed by the designated reviewer / review team.
4.	Approved Amount	This information is displayed after a grant application has been approved for funding.
5.	Submit Date	This is the date and time you submitted your grant application to the grantor agency. If you have not submitted your application as yet, this field will be displayed as blank.
6.	Last Status Date	This is the date and time edits were done to the grant application
7.	Application Reference #	After your application has been submitted to the grantor agency, the system generates an application reference number that uniquely identifies your application. If you have not submitted your application as yet, this field will be displayed as blank.
8.	Application Stage	The system displays a stage code and the corresponding stage description
9.	Status	The system displays the corresponding status description for the respective stage. In the above example, the application is in the 'Application Entry' stage and is currently being worked on.
10.	Contract / Grant Agreement Dropdown	This is displayed only if the selected grant application has been approved for funding. Use the drop-down to select the contract to be viewed. (This dropdown also lists any amendments that may have been executed post-award).
11.	View Contract *	Click on the View contract button to view the selected contract. The system invokes a popup window in which a PDF version of the contract can be viewed. An example of a contact has been shown below.
12.	Contract Signed	Click on this button to electronically sign the contract / grant agreement. The system displays the following message: "This would notify the System about Contract Signing. Do you wish to continue?" Click [OK] in this message if you wish to electronically sign the contract, otherwise click [Cancel]. If the OK button is clicked, the system treats the contract as signed by the grantee and does not display the 'Contract Signed' option. (Note that based on requirements set by the grantor agency, a hard copy version of the contract may also need to be signed.)

* The following screen shown an example of the contract viewed by clicking on the  button.



3.2.5.1 Errors

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

Srl	Error	Description	Corrective Action
1.	On invoking the grant program lookup, no programs are displayed	No grant programs are assigned to you.	Select another option or contact your grant administrator
2.	The agency name displayed is not the agency you belong to	You have assigned the wrong agency as your parent agency in your user profile	Select 'Home' option and update your user profile with the correct parent agency
3.	On invoking the project lookup, no projects are displayed	No grant applications have been initiated or you do not have access to the available grant applications	Select another option or contact your project director

3.2.6 Email Log

EGrAMS sends email notifications based on certain events in the system. The emails are automatically stored in your Sent or Received folder in your email system. In addition, EGrAMS also stores a log of all emails sent and received by each user through the EGrAMS system. The Email log option allows the project director to view emails received and sent through EGrAMS. It also allows the project director to re-send emails, and delete received emails.

To access this functionality navigate to the following:

Grantee → Administration → Email Log

The Email Log screen consists of a header section, where the user can enter their search criteria and a display section that displays the details of emails.

Enter the search criteria in the header section as follows.

Srl	Field	Description
1.	Grant Program	Invoke the lookup to view the available grant programs and select the desired program On selection of a grant program, the system displays the grant program description
2.	Agency	Based on your user information, the system displays your agency federal id and your agency name
3.	Subject	If you are interested in viewing emails related to a specific subject, you may enter the subject as search criteria. If you are not sure of the entire subject line, you may prefix and / or suffix the subject key word with wild cards (%). For example, if you wish to review all emails related to 'Status' but are not sure of the entire subject line, you may enter your subject search criteria as '%Status%'
4.	From Date	Enter a 'from' date if you wish to view emails from a specific date. You may enter the date in MM/DD/YYYY format or invoke the calendar lookup to select the desired date.
5.	To Date	Enter a 'to' date if you wish to view emails up to a specific date. You may enter the date in MM/DD/YYYY format or invoke the calendar lookup to select the desired date. Ensure that the 'to date' is greater than the 'from date'.
6.	Option	Select the option Sent – To view emails sent out by you Received – To view emails received by you The default option is 'Received', if the option is not marked
7.	Read Status	Select the Read Status Yes – To view Read email messages only No – To view unread email messages only All – To view read and unread email messages The default option is 'All' if the option is not selected

Click on 'Find' to view the email details for your selection criteria as follows

Email Log Timeout Left: 60 mins Date: Dec-23-10

Program :

Agency :

Subject : Read Status : Yes No All

Option : Sent Received From Date: (mm/dd/yyyy) End Date: (mm/dd/yyyy)

	From	Subject	Date Sent	
<input type="checkbox"/>	Cflynn@htcinc.com	Approval of Project Director Request for Competitive Deadline based Grant - 2011-A	12/15/2010 11:03:39 AM	<input type="checkbox"/>
<input type="checkbox"/>	Cflynn@htcinc.com	Approval of Project Director Request for Competitive Deadline based Grant - 2012-A	12/15/2010 10:54:39 AM	<input type="checkbox"/>
<input type="checkbox"/>	Cflynn@htcinc.com	Documentation Changes / Updates for Competitive Deadline based Grant - 2011	11/10/2010 2:44:05 PM	<input type="checkbox"/>
<input type="checkbox"/>	Cflynn@htcinc.com	Documentation Changes / Updates for Competitive Deadline based Grant - 2011	11/10/2010 2:44:04 PM	<input type="checkbox"/>
<input type="checkbox"/>	Cflynn@htcinc.com	Documentation Changes / Updates for Competitive Deadline based Grant - 2011	11/10/2010 2:02:29 PM	<input type="checkbox"/>
<input type="checkbox"/>	Cflynn@htcinc.com	Documentation Changes / Updates for Competitive Deadline based Grant - 2011	11/10/2010 2:02:28 PM	<input type="checkbox"/>
<input type="checkbox"/>	Cflynn@htcinc.com	Documentation Changes / Updates for Competitive Deadline based Grant - 2011	11/10/2010 1:13:50 PM	<input type="checkbox"/>
<input type="checkbox"/>	Cflynn@htcinc.com	Documentation Changes / Updates for Competitive Deadline based Grant - 2011	11/10/2010 1:13:48 PM	<input type="checkbox"/>

The default order of listing the emails is by date and time. You may change the order by clicking on the respective column heading.

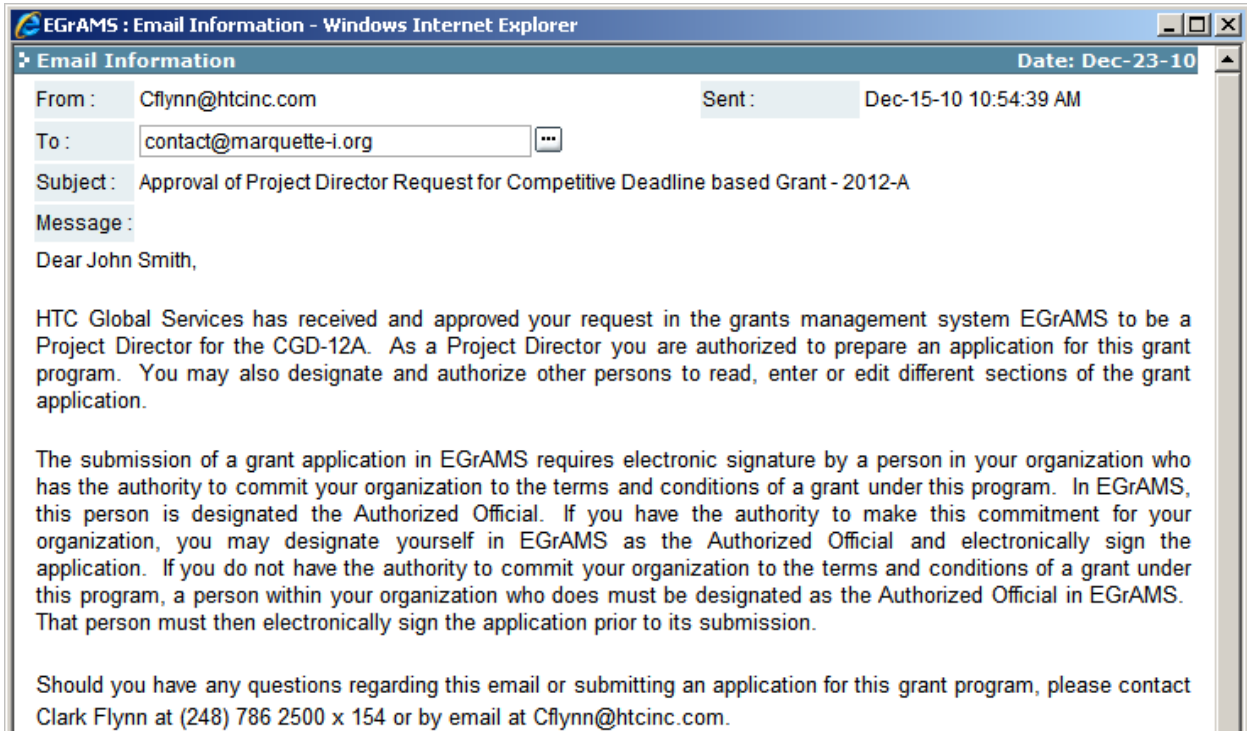
From	Subject	Date Sent
------	---------	-----------


In the header row as shown above, Click on 'From' to list the emails by Sent From email address; Click on 'Subject' to list the emails by Subject; or Click on 'Date' to list the emails by date time.

Listed below are the details of the email log displayed:

Srl	Field	Description
1.	Read / Unread indicator	<input checked="" type="checkbox"/> denotes read emails <input type="checkbox"/> denotes unread emails
2.	From	Email address of the Sender. Please note that this column header will change to 'To' and the list will display email recipients if the search option is selected as 'Sent' instead of 'Received'
3.	Subject	Email subject displayed by the system
4.	Date Sent	Date and time Sent / Received displayed by the system
5.	<input type="checkbox"/>	Delete icon. You may delete received emails after reading them. Click on the delete icon and select OK to delete the email from your email log. Only emails received by you can be deleted. In addition to delete an email, you should have read the contents of the email. In the event that the email cannot be deleted by you, the system will display the delete icon in disabled mode <input type="checkbox"/>

The system allows you to view the details of the email message. Click on the Subject of the respective email message to view the details as follows:



For emails that were sent out by you, this screen provides an option to re-send the email. You can do this by clicking on the  button. You can only re-send emails sent out by you. You cannot re-send received emails.

3.2.7 Select Local Council

Some grant programs require designated local councils to review grantee applications before they can be submitted to grantor agencies for review and evaluation. Refer to the respective grant program instructions to determine whether your grant application needs to be reviewed by designated local councils prior to submission to the grantor agency. If your grant application does not need to be reviewed by the designated local councils, you need not assign your application to a designated local council.

To access this functionality navigate to the following:

Grantee → Project Director → Select Local Council

This screen supports the following three modes:



1. Assign – allows you to assign local council users to your grant application.
2. Change – Allows you to change existing assignment information.
3. Display – Allows you to view the existing assignment information.

Click on the desired mode to perform the required operation.


3.2.7.1 Assign


Select the 'Assign' mode to assign local council users to your grant application. The system will display users for all designated local councils that your agency serves. On selection of the Assign mode, the system displays the following screen.

Enter the data in the header section as follows.

Srl	Field	Description
1.	Grant Program	Invoke the lookup to view the grant programs. Select the appropriate grant program.
2.	Agency	Agency federal id and name displayed by the system
3.	Application	Invoke the lookup to view the grant applications. Select the appropriate grant application for which you need to assign designated local council users.

Enter the data in the table / grid section as follows.

Srl	Field	Description
1.	User Name	Invoke the lookup to view the designated local council users for county(ies) that your agency serves. Select the appropriate designated local council user. The system displays the user full name.
2.	County	County description that the user serves is displayed by the system
3.	Category	This is a no entry field. Leave blank.
4.	Access Granted	'Inactive' displayed by default in Assign mode. Change to 'Active' to assign the selected user.
5.	Perm Code	Invoke the lookup to view the available permission / responsibility codes. Select the appropriate role you would like the user to play on the grant application. <div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;">  <i>Since designated local council users perform the role of reviewers on your grant application before the application can be submitted to the grantor, select 'Reviewer' as the role</i> </div>
6.	Info	Click on this icon to display the designated local council information (address, telephone number, etc)

On selection of the 'Info' icon  , the system displays the following screen.

User Agency Details		Date: Feb-14-05	
Agency :	IONIA - Ionia CO Council for Prev.of CAN		
Address :	P.O Box 358		
City :	Ionia		
State :	MI	Zip :	48846 -
Telephone :	(800) 527 5332	Fax :	(800) 527 5334
Contact Person :	Jane Doe		
Email :	jdoe@ioniacounty.org		
<input type="button" value="X Close"/>			

Done Local intranet

This is a no entry screen that displays the designated location council information for ready reference. Click on 'Close' to return to the 'Select Local Council' screen.

Click on 'OK' to save your local council user assignment information. Click on 'Cancel' to discard the local council user assignment.

3.2.7.2 Change

If the mode is other than 'Change', select 'Cancel' to enable all modes. Select 'Change' to change local council user assignment to a grant application. On selection of 'Change' the system displays the screen as follows.

<input type="button" value="Assign"/>	<input checked="" type="button" value="Change"/>	<input type="button" value="Display"/>
Specify Grant Program And Agency Information and Click the action..		
Grant Program :	<input type="text"/>	<input type="text"/>
Agency :	<input type="text"/>	<input type="text"/>
Application :	<input type="text"/>	<input type="text"/>

Enter the header information as in 'Assign' mode. On click on the 'Find' button at the bottom of your screen, the system displays the available grant the system displays all local council users that are assigned to the respective grant application as follows.

➤ Assign Users
Date: Feb-14-05

Specify Grant Program And Agency Information and Click the action..

Grant Program :	DS-FY06	...	FY 06 Primary & Secondary Child Abuse & Neglect
Agency :	38-2117665	...	Big Brothers Big Sisters of Clinton / Ionia County
Application :	BCM-2005	...	BBBS Clinton Mentoring - 2005

	User Name	County	Category?	Access Granted	Perm Code	+Info
<input type="checkbox"/>	LC-001-ICC-1 ... Ionia Council	Ionia	<input type="checkbox"/>	Active ▼	3

Comment Line:

User Name: GR-001-BBB-1 [GR-001-BBB-Prj Dir]
 Agency: Big Brothers Big Sisters of Clinton / Ionia County

Done
Local intranet

You may change the Access granted from 'Active' to 'Inactive'.

Click on 'OK' to save the changes to your local council user assignment information. Click on 'Cancel' to discard the changes made to the local council user assignment.

3.2.7.3 Display

If the mode is other than 'Display', select 'Cancel' to enable all modes. Select 'Display' to view local council users assigned to a grant application. On selection of 'Display', enter the header details as in the 'Assign' mode. On click on the 'Find' button at the bottom of your screen, the system displays the available grant the system displays all local council users that are assigned to the respective grant application as follows.

Assign Users Date: Feb-14-05

Specify Grant Program And Agency Information and Click the action..

Grant Program : DS-FY06 ... FY 06 Primary & Secondary Child Abuse & Neglect
 Agency : 38-2117665 ... Big Brothers Big Sisters of Clinton / Ionia County
 Application : BCM-2005 ... BBBS Clinton Mentoring - 2005



User Name	County	Category?	Access Granted	Perm Code	User Status	+Info
<input type="checkbox"/> LC-001-ICC-1 ... Ionia Council	Ionia	<input type="checkbox"/>	Active	3 ...	Active	...

Comment Line: _____

3.2.7.4 Errors

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

Srl	Error	Description	Corrective Action
1.	On invoking the grant program lookup, no programs are displayed	Your are not authorized as a project director for any grant programs	Select a different option
2.	On invoking the grant application lookup, no grant applications are displayed	You have not initiated any grant applications for the selected grant program	Select the 'Assign Users' option and initiate a grant application for the respective grant program
3.	You cannot add new applications as the submission date has passed	The submission of a grant application for the selected program has passed.	Select another program, mode or option.
4.	Following users are already assigned to this application (<user_login>, <user_name>)	This is just an informational message to alert you that the following designated local council users have already been assigned to the respective grant application	Click on 'OK'

Srl	Error	Description	Corrective Action
5.	On invoking the user name lookup, no users are displayed	<p>The county information your agency serves many not have been entered</p> <p>No designated local council users for the county(ies) that your agency serves have registered in EGrAMS</p>	<p>Review your agency profile using the following path Grantee → Project Director → Agency information. Ensure that the county(ies) that your agency serves has been entered</p> <p>Contact your designated local council OR the grant administrator for the respective grant program</p>
6.	Row <x> : <user name> already exists	The user on row 'x' has already been assigned as a reviewer for the grant application	<p>Delete the duplicate user by un-checking  LC-001-CCC-1 </p> <p>the checkbox as <input data-bbox="1339 819 1372 850" type="checkbox"/></p>

3.2.8 Request Multiple Agency Access

EGrAMS allows users to have access to grant application and related information for multiple agencies. This is based on the User Role assigned to the respective user (for example, users with the role 'Consultant').

When a user creates their profile with a role that has been defined for multiple agency access, they are required to enter a parent agency with which they are associated. In addition, this screen allows submission of request for access to other grantee agencies in the system.

The request must be approved by authorized grantor staff for the respective user to access information for the requested agencies. In addition, Project Directors / Local Administrators from the respective grantee agencies must give the user appropriate permissions on specific grant applications for access to information within the grant applications.

To access this functionality navigate to the following:

Grantee → Administration → Agency Access Request

This screen supports the following modes:



1. Setup – Allows you to request multiple agency access
2. Review – Allows you to review the status of your access for requested agencies.

Select the desired mode to perform the required action

3.2.8.1 Agency Access Request

Select the 'Setup' mode to request access to one or more grantee agencies. Your user name is pre-populated by the system (based on the login) in the User lookup section. Click on the 'Find' button at the bottom of your screen to retrieve any existing access information and enter new information.

An example of this screen has been shown below:

The following table provides a description of the contents of this screen:

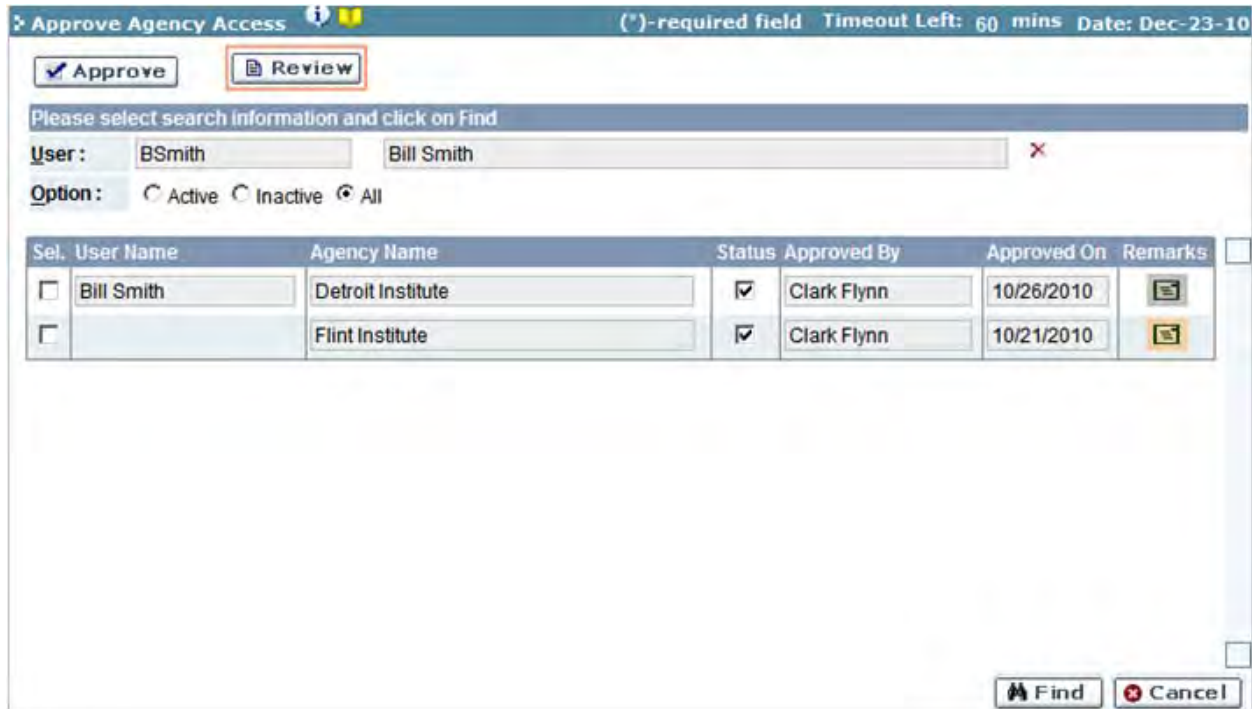
Srl	Field	Description
1.	User	Display-only field, populated by the system based on the Logged in user
2.	Agency	Display-only field, populated by the system – Parent Agency for the Logged in user
3.	Sel <input type="checkbox"/>	Display-only field, managed by the system. Selected check-boxes indicate records being submitted.
4.	Del	Click on the link to delete any record before clicking the OK button. This will update the link to . The system will not submit a request for access to agencies marked with icon.
5.	Agency Name	Invoke the lookup to select from a list of agencies other than your parent agency for which you want to submit a request for access.
6.	Status <input type="checkbox"/>	Display-only field, managed by the system. (In review mode, selected check-box indicates that the user has access to the corresponding agency)
7.	Approved By	Display-only field, managed by the system. (In review mode, displays the name of the grantor staff that approved request)
8.	Approved On	Display-only field, managed by the system. (In review mode, displays the date the request was approved)


Srl	Field	Description
9.	Remarks	Display-only field, managed by the system. (In review mode, clicking on the link displays any approval notes by the grantor for the corresponding agency)

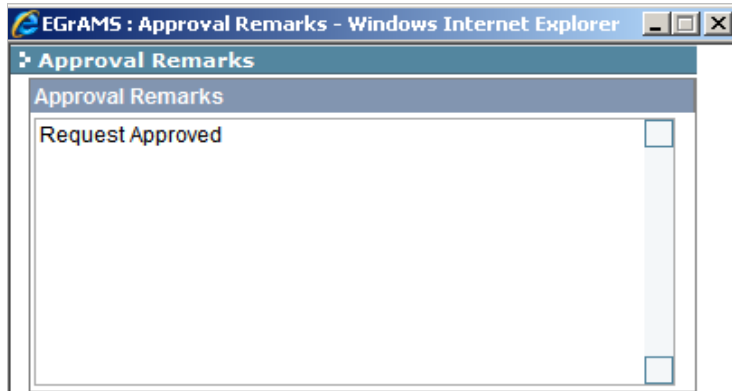
Click on 'OK' to submit your request, or 'Cancel' to discard the request.

3.2.8.2 Review

Select 'Review' mode to view your access to grantee agencies. No changes can be made in Review mode. Click on the 'Find' button at the bottom, to view information. The system displays the following screen:



In the above screen, the users request for access has been approved for the agency marked with in the **Status** column. Click on the corresponding Remarks link - , to view any remarks by the grantor. The system displays the grantor remarks in a popup window as shown in the following example:



3.2.8.3 Errors

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

Srl	Error	Description	Corrective Action
1.	Cannot assign reference to parent agency <agency name>	The list of agencies for which access is being requested includes the user's parent agency.	Locate and remove the parent agency from the list. You may click on the ✖ icon for the parent agency and click OK to submit request.
2.	Duplicate Records exist for Agency <agency name>	The indicated agency has been included in the list more than once.	Identify and remove any duplicate occurrences of the indicated agency. You may click on the ✖ icon for the parent agency and click OK to submit request.

3.3 Grant Application

Grant applications are entered by grantees online using the EGrAMS system. The system provides a user friendly and intuitive user interface for online application entry. Extensive online help and instructions are provided to facilitate navigation through the various application entry screens. The system identifies the sections that have been completed, pending, errors, attachments, etc. All grant applications are validated based on the business rules defined for the grant. The system validates users and only authorized users are permitted to submit grant applications. The grant application submissions are validated against the submission timeline (date and time) and late submissions are automatically rejected.

The system has a workflow engine that triggers certain tasks based on your actions. The workflow engine automatically updates that status of your application and promotes the application to the appropriate stages of the grant life cycle.

This section describes the following grant application management functions.

- Enter Grant Application
- Upload Application Budget
- Print and Submit your Application

3.3.1 Enter Grant Application

This option allows a user to enter or edit their grant application.



Before you attempt to enter / edit a grant application, ensure that you have initiated your grant application – Refer to the section Assign Users.

To access this functionality navigate to the following:

Grantee → Grant Application → Enter Grant Application

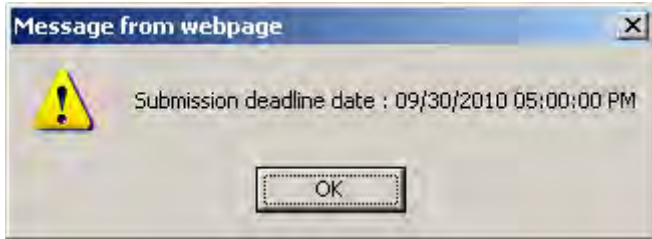
On selection of the ‘Enter Grant Application’ option the system displays the following screen.

Grant Application Entry		Timeout Left: 60 mins	Date: Oct-01-10
*Status:	<input checked="" type="radio"/> Open <input type="radio"/> All		
*Program:	<input type="text"/> ... <input type="text"/>		<input type="button" value="go"/>
Agency :	92-0158003 Marquette Institute		
Project :	<input type="text"/> ... <input type="text"/>		<input type="button" value="X"/>
Stages :	<input type="text"/> ... <input type="text"/>	Status :	<input type="text"/> ... <input type="text"/> <input type="button" value="X"/>
Program	Description	Submit Date	
CGD-11	Competitive Deadline based Grant - 2011	10/7/2010 5:00:00 PM	
CGD-11	Competitive Deadline based Grant - 2011	Application Entry	Pending
CGD-001	Application for Comp Grant	Application Entry	Pending

The above screen displays your agency federal id and agency name. It also displays a lookup for grant program. You may invoke the program lookup and select a grant program to filter your applications listing for the specific grant program.

The system displays the grant program code, description and last submission date and time for the respective grant program. Listed below the grant program, the system displays all the grant applications that the respective user has access to for the respective grant program.

Click on the desired grant application select the application for entry / edit. On selection of the grant application, the system displays a 'last date submission' reminder as follows.



On click of 'OK' the system displays the following screen.

Face Sheet Transaction (*)-required field Timeout Left: 60 mins Date: Oct-01-10

Agency Marquette Institute Program : Competitive Deadline based Grant - 2011
 Application : Competitive Deadline based Grant - 2011 [Show Documents](#)

Cover Page Certifications Description Measurements Performance Sustainabi [Left Arrow] [Right Arrow] [Close]

[Save] [Save +] [Validate] [Errors] [Done] [PDF] [Copy] [Show Tree]

1. Organization Information [Show Instructions](#)

a. *Organization Name Marquette Institute

b. Organizational Unit

c. *Address P.O. Box 4006

d. Address 2

e. *City Marquette *State MI *Zip 1 49855 Zip 2

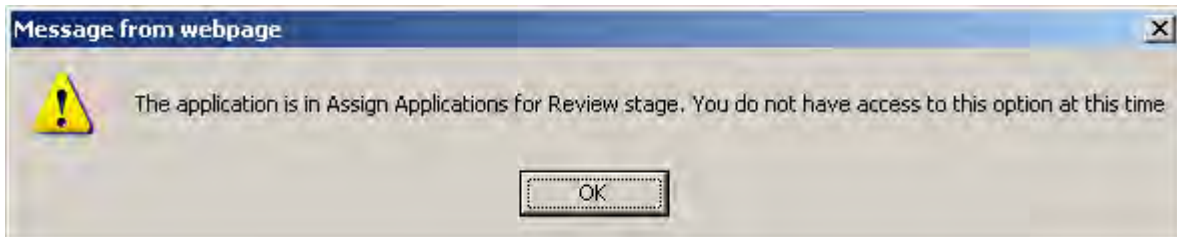
f. *Federal I.D. Number 92-0158003 DUNS Number AEC07269

g. Agency's fiscal year (beginning month and day) October - 1

h. *Agency type (please check one)
 Private, Non-Profit For-Profit Public
 UNIVERSITY



Entry / Edit to a grant application is controlled by the current stage and status of your application. If the stage / status of your application do not allow edits, you will receive a message similar to the following.



3.3.1.1 Application Sections

Before we get into the details of application entry, let us understand the various components of the application entry screen. The above screen is divided into four sections.

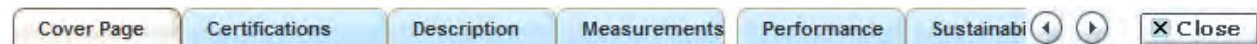
3.3.1.1.1 Application Header

The application header section is standard across all the pages of the grant application. On the first line it displays the section you are on. It also displays the agency name, program name and the project name. Illustrated below is an example of the application header section.

Face Sheet Transaction		(*)-required field		Timeout Left: 59 mins	Date: Oct-01-10
Agency	Marquette Institute	Program :	Competitive Deadline based Grant - 2011		
Application :	Competitive Deadline based Grant - 2011			Show Documents	

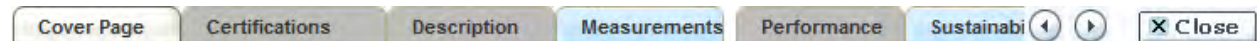
3.3.1.1.2 Application Section Tabs

The application section tabs display the various main sections within the grant application. Each section may consist of several subsections and within each subsection there may be several pages. You can also use the section tab to navigate to the first page of the respective section. Based on your access permission, some section tabs may be disabled. This implies that you do not have access to the disabled sections and you will not be able to navigate to those sections. Illustrated below is an example of the Application Section Tabs section.



The tab in white denotes the current section of your grant application.

Illustrated below is an example of restricted access to specific sections in an application.



In the above example, the user does not have access to the sections – Certifications, Description and Performance. To change a user access to application sections, refer to 'Assign Agency Users' section of the documentation.

Most grant applications comprise of sections such as the Face Sheet / Cover Page, Program/Project, Budget and Miscellaneous. Some of the sections may be mandatory, whereas some sections may be optional. In EGrAMS the application is designed and configured using the designer tool and hence all grant program applications may not look the same nor may have the same section tabs as shown in this example.

Face Sheet / Cover Page Section

The face sheet section comprises of three subsections.

Fiscal Agent Information – This subsection is used to enter the grantee agency and demographic information. Page one of the fiscal agent subsection is standard for all grant applications. However, other pages of the subsection are based on the grant program requirements.

Program / Service Information - This subsection is used to enter the project information. Page one of the projects / service subsection is standard for all grant applications. However, other pages of the subsection are based on the grant program requirements.

Contact Information - This subsection is used to enter the contact information for the grant application. You may enter as many contacts as required.

The system will guide you with adequate help text and instructions to aid you in entering the face sheet information.

Program Section

The Program section is used to enter the project narrative information and may have several subsections such as Project summary, Project Description, Evaluation and Documentation, Work Plan etc. Each of these subsection titles may be configured according to the grant application. Further, each of these subsections may have additional subsections. (For example, Project Description may have subsections such as Statement of Need, Target Population, Project Objectives and Activities, Agency Capacity, Collaboration, Feasibility of Funding beyond Grant Period, etc).

The system will guide the user with adequate help text and instructions to aid entering the appropriate program information.

Budget Section

The Budget section is used to enter the various expenses under the allowed expense categories.

Index Section

This section is used to display the Table of Contents of your application. It displays all the sections, subsections, sections that are complete, errors, attachments, etc. Illustrated below is an example of the index page.

Application Index Timeout Left: 60 mins Date: Dec-23-10

Agency: Marquette Institute Program: Competitive Deadline based Grant - 2011

Application: Application for Competitive Deadline based Grant - 2011 [Show Documents](#)

Navigation: Cover Page | Measurements | Performance | Sustainability | Qualifications | Budget | Close

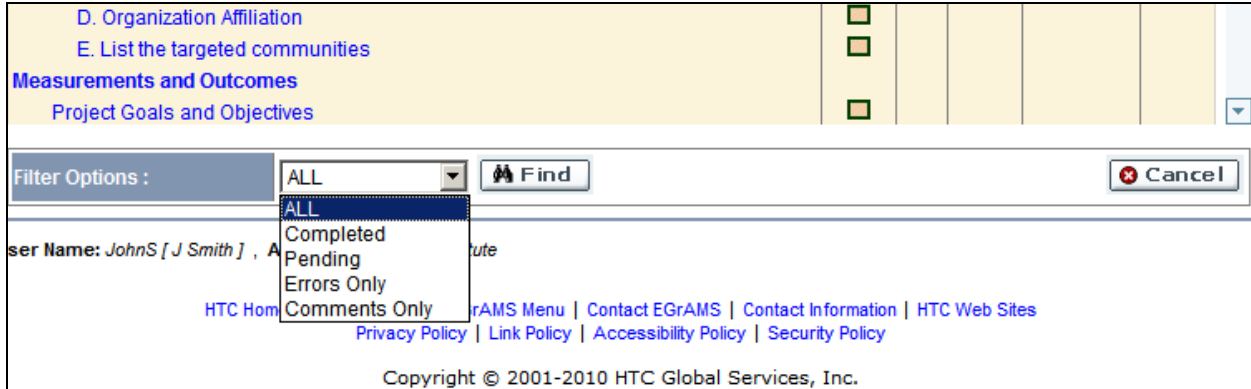
Description	Status	Del	Errors	Comments	Files
Cover Page					
1. Organization	<input checked="" type="checkbox"/>				
2. Project	<input checked="" type="checkbox"/>				
Measurements and Outcomes					
Project Goals and Objectives	<input type="checkbox"/>				
Performance Measures					
1. Availability of jobs to participants	<input checked="" type="checkbox"/>		×		
Project Sustainability					
1. Plans for continuation1	<input checked="" type="checkbox"/>		×		
Organization Qualifications					
1. Organization strengths	<input type="checkbox"/>				
2. Prior year awards	<input type="checkbox"/>				
3. Participant success story	<input type="checkbox"/>				
4. Pending or unresolved litigation	<input type="checkbox"/>				
5. Organization Qualification Attachments	<input type="checkbox"/>				
Project Budget					
Budget Detail	<input type="checkbox"/>				
Budget Summary	<input type="checkbox"/>				

Filter Options: ALL Find Cancel

In the above screen all sections marked with in the 'Status' column, have been entered.

You can click the respective table of content line to navigate to the selected page. You can also click on the error icon in the error column to view errors.

At the bottom of the index screen, the system displays a filter option to select and display specific conditions specified by the user. The default option is 'ALL'. If you wish to view sections based on the supported search criteria, select the respective filter option from the dropdown and click on Find.



Close

Click on the  button to close your application form and return to the application listings page.

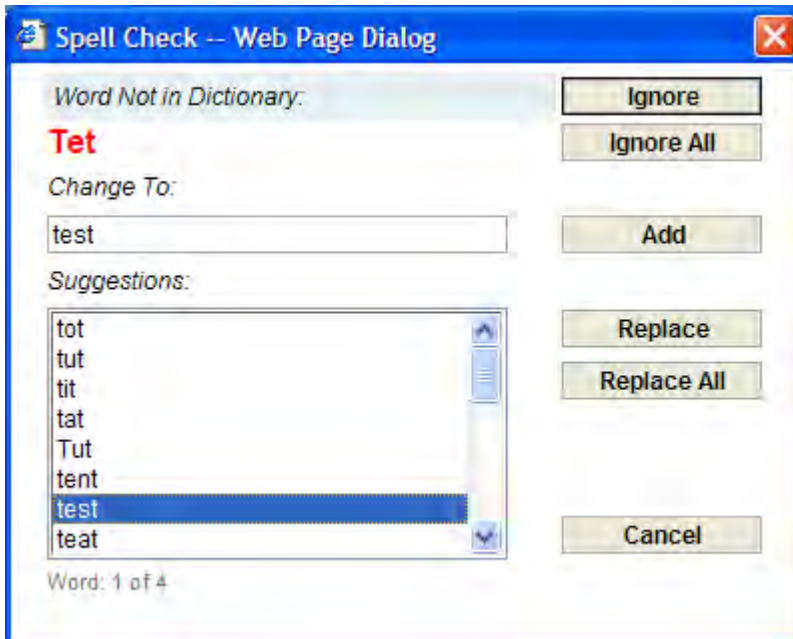
3.3.1.1.3 Options

The Options section is standard across all the pages of the grant application. It allows the user to perform certain actions. Illustrated below is an example of the options section.



Spell

This option is available only in the Text sections of the grant application. Select this option to run a spell check on the text entered in the respective section / subsection of your application. On selection of 'Spell' option, the system will display the following screen.



The system will display the word with spelling errors and display the available suggestion in the EGrAMS dictionary. Click on 'Ignore' to bypass the spelling error. Highlight the desired suggestion and click

'Replace' or 'Replace All' to change one instance or all instance of the erroneous word in the respective section. Click on 'Cancel' to cancel the spell check operation.

Save 

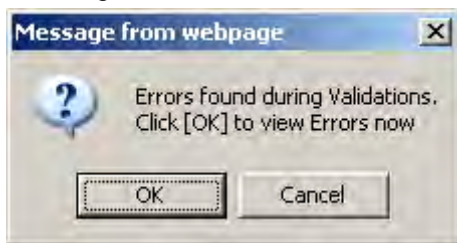
Select this option to save the information you have entered or edited in your grant application. You need to save each page you have entered or the information will be lost. On selection of the 'Save' option, the system saves the entered information.

Save & Continue 

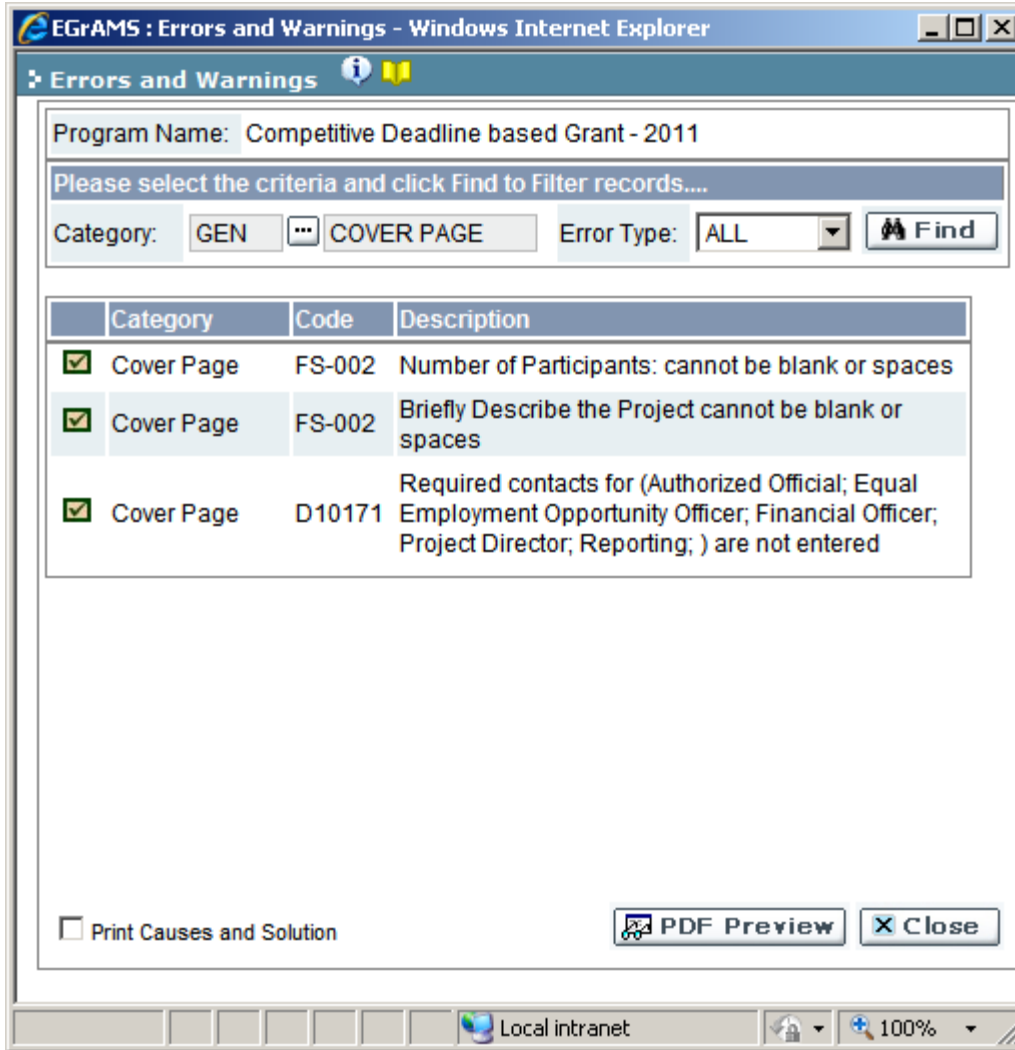
On selection of the 'Save' option, the system saves the entered information and displays the next page (application section / sub-section) for your entry.

Validate

On selection of the Validate option, the system validates the entered information against the business rules for the current application section. If errors are found during validation, the system will display the following screen.



Click '**OK**' in the above message to view the errors window for errors in the current application section (Cover Page) as shown below.



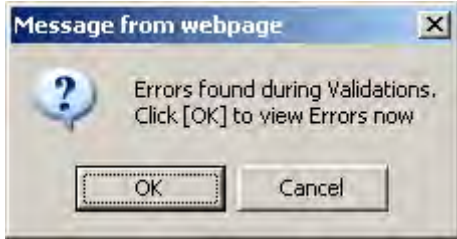
Errors

Select this option to view the validation errors. On selection of 'Errors' option, the system displays the error window as shown above.

You can make a note of the errors, click on 'PDF Preview' to print a PDF of all errors and optionally select 'Print causes and Solution' to print the possible reasons and the remedial action for each error. You can click on for the system to take you to the erroneous page. Correct the required information and click on 'Save' to save the edited information.

Done

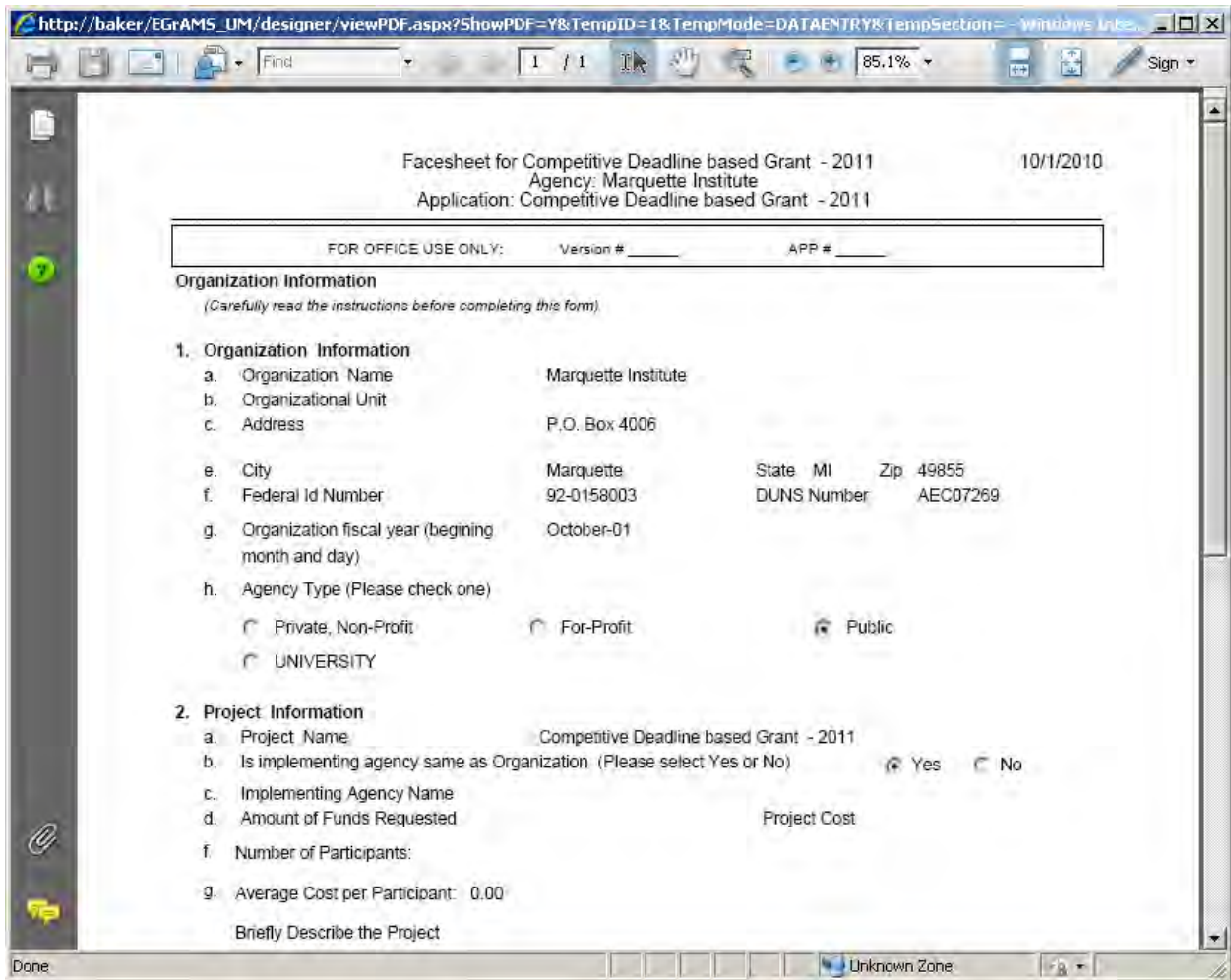
Select this option, if you believe that you have completed all the entry / edits for the respective section. On selection of 'Done' option, the system validates the entered information for all application sections against the business rules. If errors are found during validation, the system will display the following screen.




Click on 'Ok' to view the errors window as described in the 'Errors' section

PDF

Select this option to view the current section of your application in PDF format. On selection of 'PDF Preview' option, the system displays the PDF of the cover page (since we are in the cover page section) as follows.



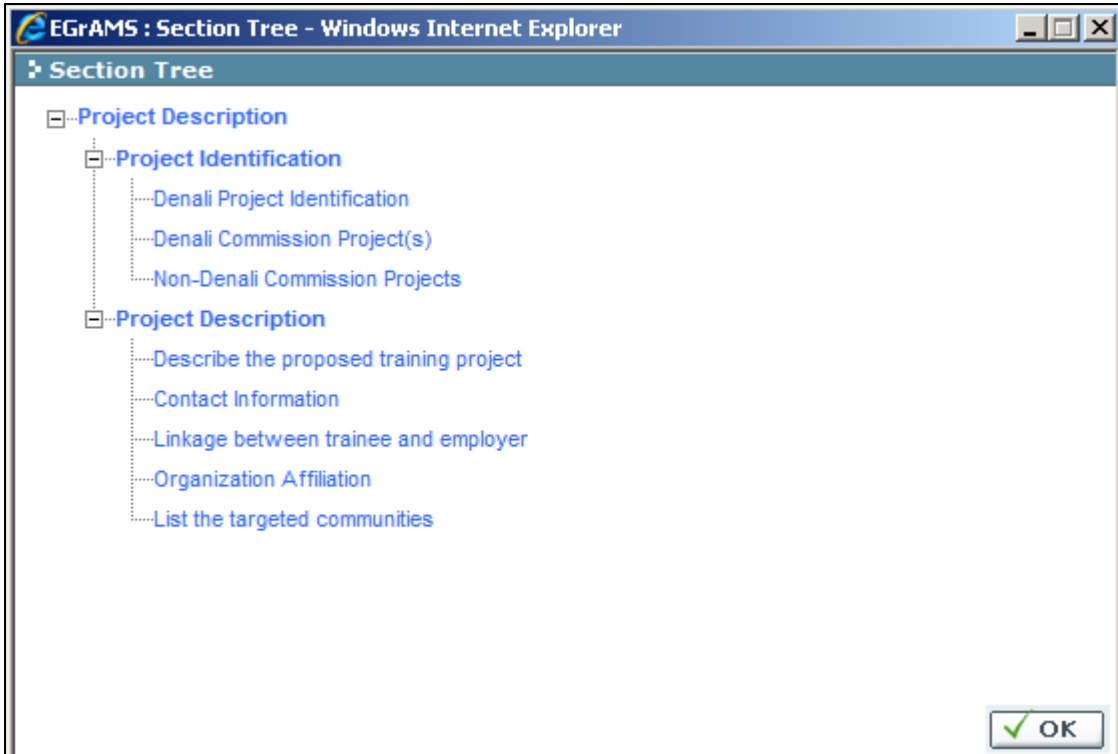
In the above example, you can click on the  icon to print the PDF of the current application section.

Copy

Select this option to copy a section from another application for example from previous year’s application submitted by your agency.



Show Tree

Select this option to display a hierarchical tree-view of the sub-sections in the current application section (example depicted below)



Selecting a section and clicking OK in the above screen will navigate you to that particular application page (sub-section)

Navigation Buttons

Use the navigation buttons   to go to the next and previous pages of your application.

3.3.1.1.4 Application Content section

The content section is where you enter / edit information for your grant application. Every page will be different. You can enter sections in any order and you need not complete the entire application in one session. However, each time you enter / edit information on a page, before going to the next page of the application, make sure you click on ‘Save’ to save your information. Illustrated below is an example of the content page on the face sheet section.

Face Sheet Transaction (*)-required field Timeout Left: 60 mins Date: Oct-01-10

Agency: Marquette Institute Program: Competitive Deadline based Grant - 2011
 Application: Competitive Deadline based Grant - 2011 [Show Documents](#)

1. Organization Information [Show Instructions](#)

a. *Organization Name: Marquette Institute

b. Organizational Unit:

c. *Address: P.O. Box 4006

d. Address 2:

e. *City: Marquette *State: MI *Zip 1: 49855 Zip 2:

f. *Federal I.D. Number: 92-0158003 DUNS Number: AEC07269

g. Agency's fiscal year (beginning month and day): October - 1

h. *Agency type (please check one)

Private, Non-Profit
 For-Profit
 Public

 UNIVERSITY

Now that we are familiar with various applications sections, tabs, options and content sections, let us get on with the entry of a grant application.

In the following sections we will go through some of the application sections with a view to provide the various section types that can be designed for a grant program. Each program may have different application and the content to be entered may be different from the example below.

3.3.1.2 Face sheet / Cover Page

On selection of the desired grant application for entry or edit and acknowledgement of the 'last date submission' the system will display the first page of the grant application. The first page of the application is Organization Information as follows.

3.3.1.2.1 Organization Information

Face Sheet Transaction (*)-required field Timeout Left: 60 mins Date: Oct-01-10

Agency: Marquette Institute Program: Competitive Deadline based Grant - 2011
 Application: Competitive Deadline based Grant - 2011 [Show Documents](#)

1. Organization Information [Show Instructions](#)

a. *Organization Name: Marquette Institute

b. Organizational Unit:

c. *Address: P.O. Box 4006

d. Address 2:

e. *City: Marquette *State: MI *Zip 1: 49855 Zip 2:

f. *Federal I.D. Number: 92-0158003 DUNS Number: AEC07269

g. Agency's fiscal year (beginning month and day): October - 1

h. *Agency type (please check one)


Private, Non-Profit
 For-Profit
 Public

 UNIVERSITY

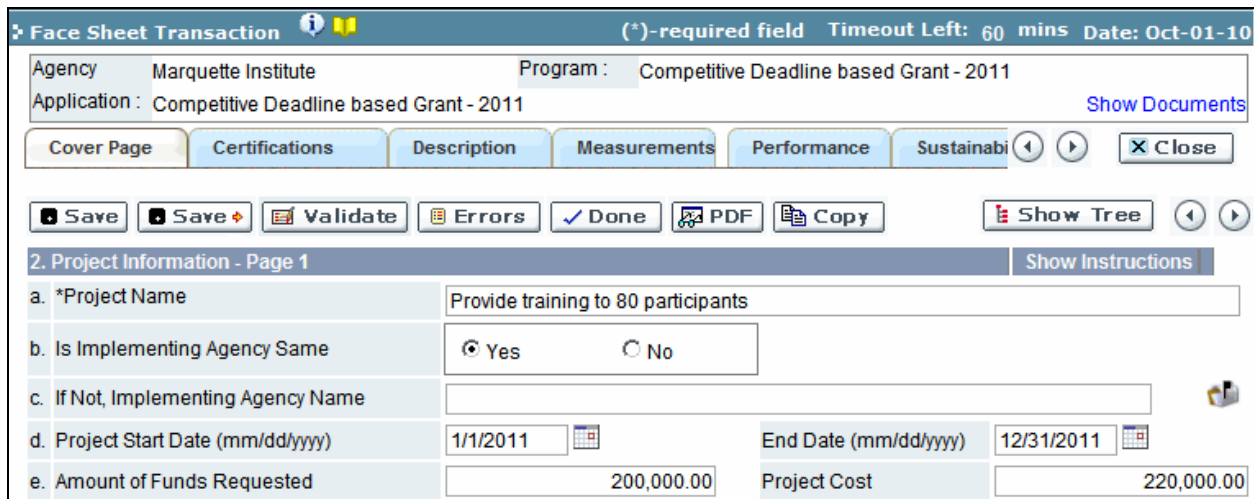
Based on grant application selected, the system displays your agency information. Review the information and make changes, if required. Enter the information as follows.


Srl	Field	Description
1.	Organization Name	The agency name is displayed from your agency information. Change, if required
2.	Organizational Unit	The organizational unit name is displayed from your agency information. Change, if required. This field is optional and may or may not be entered.
3.	Address	The street address is displayed from your agency information. Change, if required.
4.	Address Line 2	The address line 2 is displayed from your agency information. Change, if required. You may enter P.O Box or Suite # information here, if available. This field is optional and may or may not be entered.
5.	City	The city is displayed from your agency information. Change, if required.
6.	State	The state code is displayed from your agency information. Change, if required.
7.	Zip Code	The zip1 and zip 2 is displayed from your agency information. Change, if required.
8.	Federal Id	The federal id is displayed from your agency information.
9.	Duns Number	The Duns Number is displayed from your agency information, if available. Change, if required. This field is optional and may or may not be entered.

Srl	Field	Description
10.	Agency's fiscal year (beginning month and day)	Select your agency start fiscal month from the dropdown. Enter your start fiscal day. Ensure that the day is valid for the selected month
11.	Agency Type	The agency type is displayed from your agency information. Change, if required.

Click on  to save the entered / edited information and navigate to the next application entry screen as follows.

3.3.1.2.2 Project Information



NOTE: Based on the grant program the next screen displayed may be a subsequent page in the Organization Information section. You may click on the  navigation button to navigate to the Project Information section shown above.

The fields in this application entry screen have been listed below

Srl	Field	Description
1.	Project Name	The project name is displayed from your project title information. Change, if required
2.	Is the implementing agency same	Answer 'No' if another agency is implementing the project. Enter 'Yes' if your agency is implementing the project.
3.	Implementing Agency name	This field is to be entered only if your response to the question 'Is the implementing agency same' is 'No'. If your response is 'Yes', leave the field blank.
4.	Project Start Date	Enter the proposed start date of the project in MM/DD/YYYY format or invoke the calendar lookup to select the desired date. Ensure that the project start date is not before the grant program effective from date.
5.	Project End Date	Enter the proposed end date of the project in MM/DD/YYYY format or invoke the calendar lookup to select the desired date.

Srl	Field	Description
		Ensure that the project end date is not before the project start date.
6.	Amount of Funds requested	Enter the grant amount requested. Ensure that the amount of funds requested is greater than 0
7.	Project Cost	Enter the total project cost. Ensure that the project cost is greater than 0. In addition, ensure that the project cost is greater than or equal to the requested amount and match requirements.

Enter the information in the above screen and click  to navigate to the next Cover Page / Face Sheet section as follows.


3.3.1.2.3 Contact Information

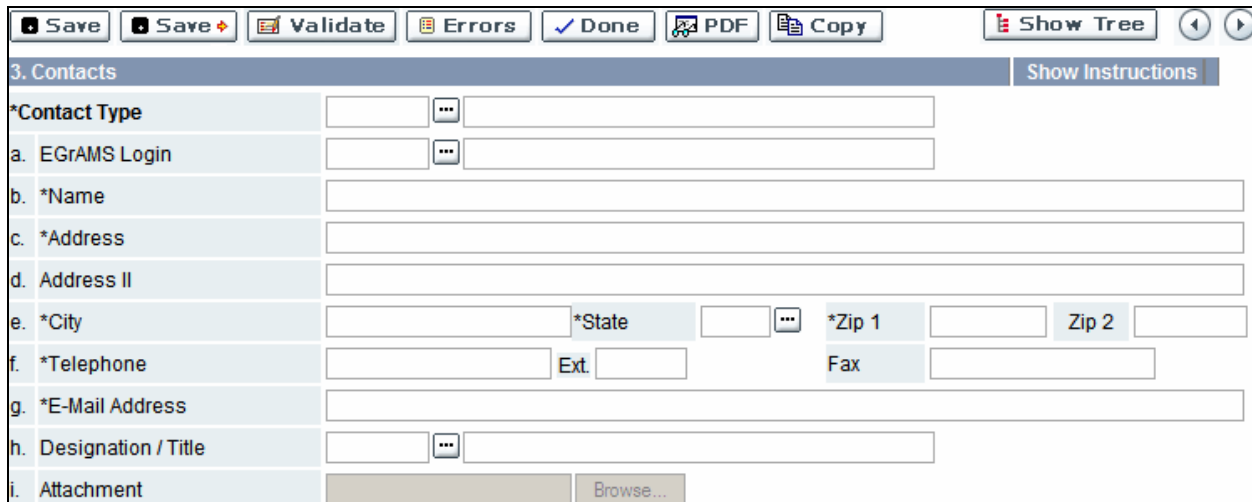
Enter contacts as per the required contact types for your agency. Invoke the Contact Type lookup and select the desired contact type. The contact entered may or may not have a user account in the EGrAMS system. If a particular contact has an account, you may invoke the 'EGrAMS Login' lookup and select the desired contact. The system will automatically populate the available information from the user profile. If the contact does not have an EGrAMS account, enter the contact name and tab out of the field. The system will automatically populate the available contact information (such as address, telephone etc) from your agency information. In both cases, you may make any changes to the contact information as required. You may also attach a document with the contact (Resume in the above example) if the grant has been configured to allow an attachment for the selected contact type.


The fields in this application entry screen have been listed below


Srl	Field	Description
1.	Contact Type	Invoke the lookup to select the desired contact type
2.	EGrAMS Login	Invoke the lookup to select the EGrAMS user login name for the contact to be entered. This field may or may not be entered,

Srl	Field	Description
		depending on whether the contact has a user account in the EGrAMS system.
3.	Name	Enter / Edit the name of the Contact (This field is automatically populated if an EGrAMS login is selected).
4.	Address	Enter / Edit the contact person's address (This field is automatically populated if an EGrAMS login is selected. If not, it is populated with the agency address on tabbing out of the Name field).
5.	Address II	Enter / Edit the contact person's address line 2 (This field is automatically populated if an EGrAMS login is selected. If not, it is populated with the agency address on tabbing out of the Name field). This field may or may not be entered
6.	City	Enter / Edit the contact person's city (This field is automatically populated if an EGrAMS login is selected. If not, it is populated with the agency city on tabbing out of the Name field).
7.	State	Enter or Invoke the lookup to select the contact person's State code (This field is automatically populated if an EGrAMS login is selected. If not, it is populated with the agency state on tabbing out of the Name field).
8.	Zip 1	Enter / Edit the contact person's 5 digit zip code (This field is automatically populated if an EGrAMS login is selected. If not, it is populated with the agency zip on tabbing out of the Name field).
9.	Zip 2	Enter / Edit the contact person's 4 digit zip extension (This field is automatically populated if an EGrAMS login is selected. If not, it is populated with the agency zip extension on tabbing out of the Name field). This field may or may not be entered
10.	Telephone	Enter / Edit the contact person's 10 digit phone number (This field is automatically populated if an EGrAMS login is selected. If not, it is populated with the agency contact phone number on tabbing out of the Name field).
11.	Telephone Extension	Enter / Edit the contact person's phone extension (This field is automatically populated if an EGrAMS login is selected. If not, it is populated with the agency contact phone extension on tabbing out of the Name field). This field may or may not be entered
12.	Fax	Enter / Edit the contact person's 10 digit fax number (This field is automatically populated if an EGrAMS login is selected. If not, it is populated with the agency contact fax on tabbing out of the Name field). This field may or may not be entered
13.	E-mail Address	Enter / Edit the contact person's address line 2 (This field is automatically populated if an EGrAMS login is selected).
14.	Designation / Title	Invoke the lookup to select a designation for the contact person
15.	Attachment	(Resume in the above example) Click on the 'Browse' button to select an appropriate attachment for the contact person, if applicable.

Click on the  navigation button to navigate to the next page. The system will display a blank contact entry screen as shown below.



You may enter as many contacts as required using the  navigation button to navigate to a blank contact entry screen and entering the required details as described above.

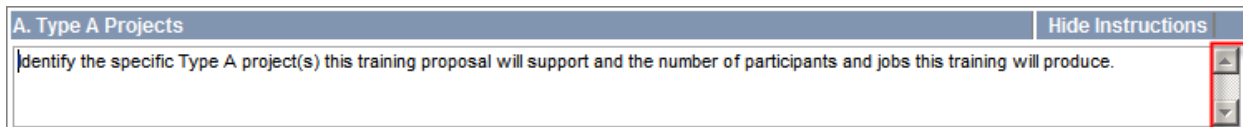
Clicking  on a blank contact entry screen will indicate to the system that you are done entering contacts and will navigate you to the next section of the grant application. (Please note that you may add more contacts at a later time using the contact entry screen as described above).

3.3.1.3 Text Sections

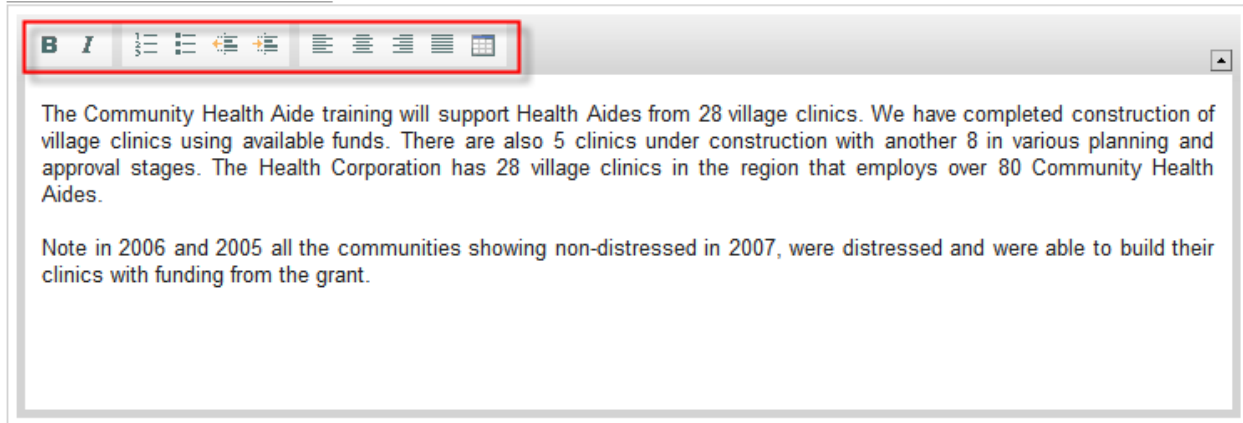
EGrAMS allows configuring text sections, wherein you may enter text details for the corresponding application section. The system allows formatted text to be entered including features such as bulleted & numbered lists, tabular data, justification and indentation. You may choose to enter data directly in the EGrAMS text editor or copy it from external editors such as MS Word.

The text section application entry screens may be divided into two parts”

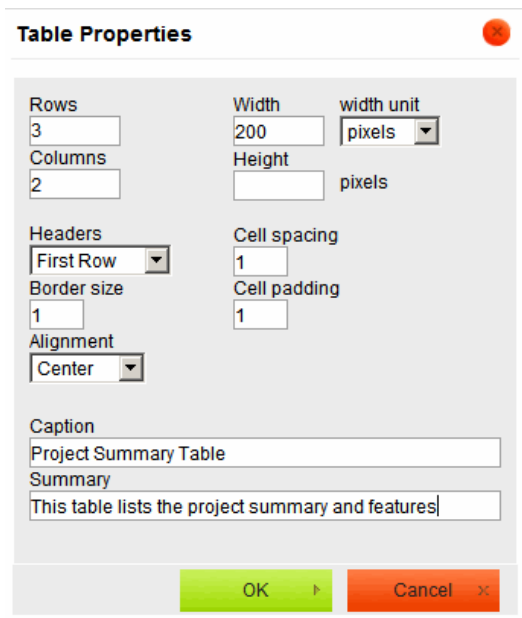
Instruction pane – This section displays the relevant help text and instructions to aid the user enter the required information. Use the vertical scroll bar (marked in red) to view all instructions, if applicable. Illustrated below is an example of the instructions pane.



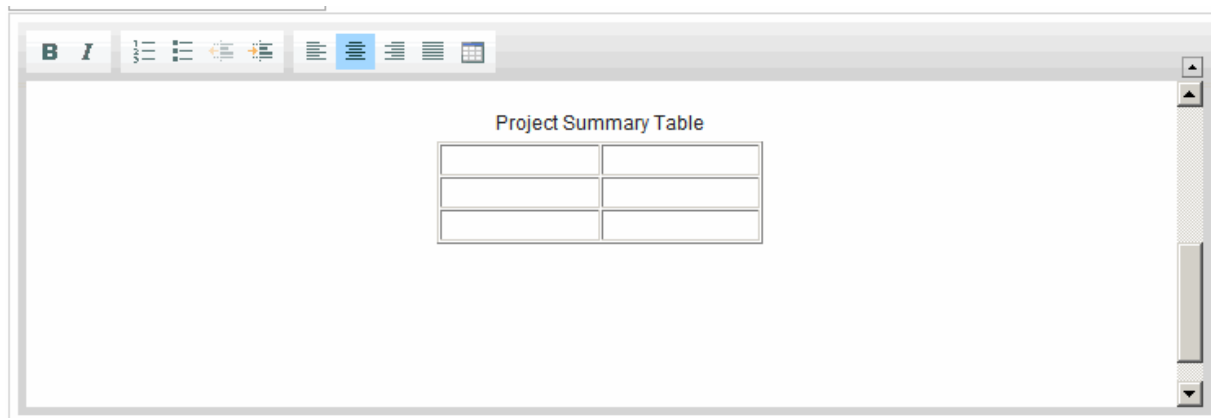
Entry Pane – This section allows the user to enter / edit the relevant content for the respective section. Illustrated below is an example of the entry pane.



The formatting options available have been highlighted (in red) in the screen above. The text editor allows creating tables and setting properties for table rows and columns as shown below.

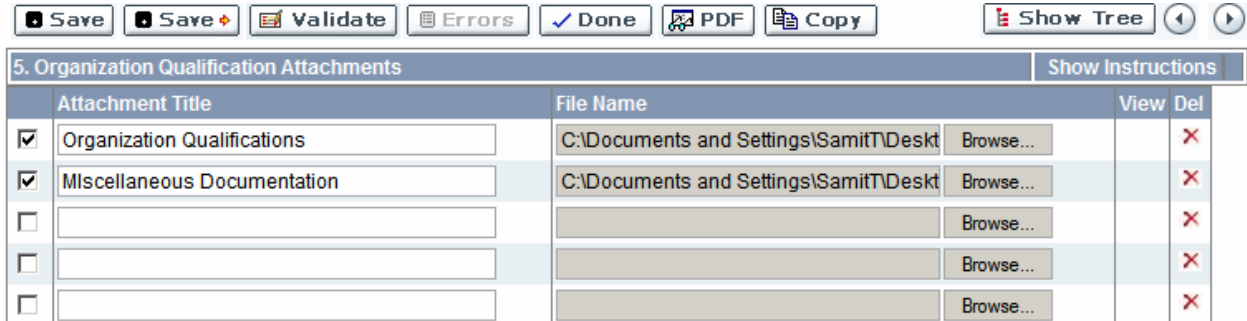


Based on the above table settings, the system would render an enterable table in the text section as shown below



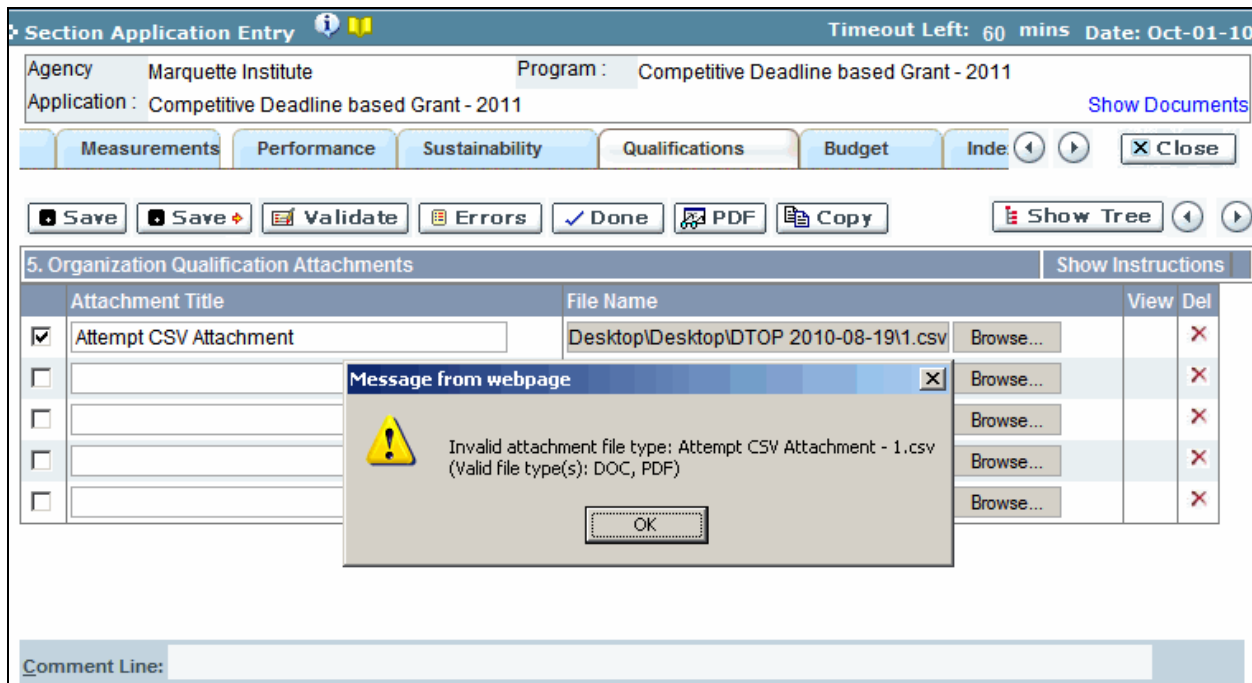
3.3.1.4 Attachment Sections

This section allows the user to submit attachments for the respective section. To select an attachment, click on the browse button and select the desired file from your local or network drive. Illustrated below is an example of an attachment section.



You are also required to enter an appropriate title for each file selected for attachment. To delete any of the selected attachments during the application entry process, click on the X icon in the delete column for the respective attachment.

Please note that EGrAMS allows grantor agencies to select and configure file types and file sizes for various application sections. If you try to attach a document that is not included in the allowed list, the system will not save your file and will display an error message, similar to the one below, when you click on the Save button for the application section:



In the above screen, the error message notifies the user of the allowed file types (DOC and PDF in this example)

3.3.1.5 Budget Sections

EGrAMS provides budget entry detail and summary sections in the grant application. The contents of these sections are based on the budget configuration for the corresponding grant program. Based on

budget configuration the budget entry may be at a summary level (expense category level) or at a detail level (line item level). The following sections describe the various budget sections in the grant application entry screen.

For detail level budget entry, the first screen in the budget section would look similar to the following (There may be variances depending on configuration for the particular grant program).

Budget Form

Category: Program Expenses - Personal Services Type: Expenditure

Classification Seq.: 1 Sub Type: Direct Narrative: [Icon]

Instructions: Instructions can be configured for entering the budget for various budget categories

	Description	Qty	Rate	Units	UoM	Total	Amount	Grantee Contribution	Notes
<input type="checkbox"/>	Director	1.00	54,000	40.00	HRS	2,160.00	0.00	2,160.00	[Icon]
<input type="checkbox"/>	Director	1.00	51,250	160.00	HRS	8,200.00	0.00	8,200.00	[Icon]
<input type="checkbox"/>	Executive Secretary	1.00	24,880	80.00	HRS	1,990.00	0.00	1,990.00	[Icon]
<input type="checkbox"/>	Assistant	1.00	27,420	80.00	HRS	2,194.00	0.00	2,194.00	[Icon]
<input type="checkbox"/>	Physician Training T	3.00	194,000	2.00	HRS	1,164.00	0.00	1,164.00	[Icon]
<input type="checkbox"/>	Others	3.00	165,000	2.00	HRS	990.00	0.00	990.00	[Icon]
						Totals:	23,749.00	0.00	23,749.00

Comment Line:

The budget entry screens comprise of the following three sub-sections:

- Budget Detail
- Budget Summary
- Sources of Funds

3.3.1.5.1 Budget Detail

The budget detail section allows users to enter the budgets under the various expense categories. Before we get into the details of entering the budget details, let us understand the various components in the budget detail screen.

Expense Category Header – This section of the screen displays the expense category description, classification and other details. Illustrated below is an example of the expense category header section.

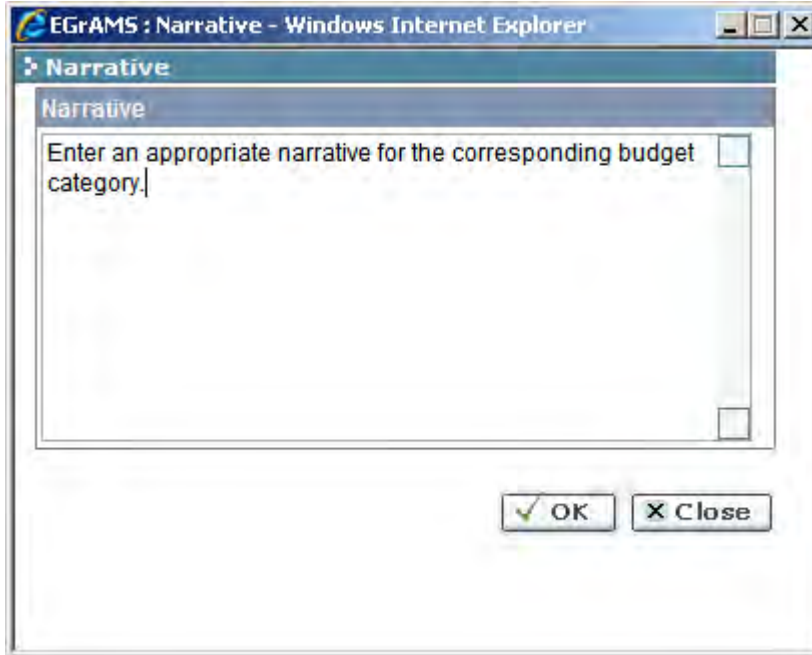
Budget Form

Category: Program Expenses - Personal Services Type: Expenditure

Classification Seq.: 1 Sub Type: Direct Narrative: [Icon]

The section also allows the user to enter the budget narrative for the expense category, if required. To enter the budget narrative for the respective category, click on the [Icon] icon, as shown above.

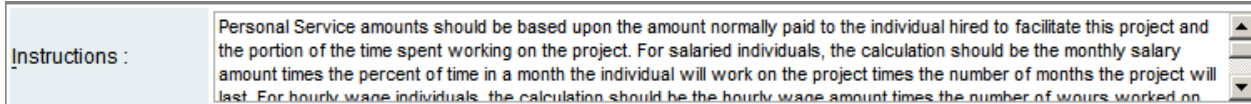
Clicking on the notes icon displays the following screen.



Enter the required narrative for the respective expense category. Click on 'OK' to return to the budget screen.

Instructions

This section of the screen displays the instructions or help text to aid the user determine what expenses may be entered under the respective expense category. Illustrated below is an example of the usage notes section.





Budget Line Item Detail

This section allows the user to enter the respective line items allowed under the respective expense category. Illustrated below is an example of a budget line item detail section.

		Description	Qty	Rate	Units	UoM	Total	Amount	Grantee Contribution	Notes
<input type="checkbox"/>	X	Director	1.00	54.000	40.00	HRS	2,160.00	0.00	2,160.00	
<input type="checkbox"/>	X	Director	1.00	51.250	160.00	HRS	8,200.00	0.00	8,200.00	
<input type="checkbox"/>	X	Executive Secretary	1.00	24.880	80.00	HRS	1,990.00	0.00	1,990.00	
<input type="checkbox"/>	X	Assistant	1.00	27.420	80.00	HRS	2,194.00	0.00	2,194.00	
<input type="checkbox"/>	X	Physician Training T	3.00	194.000	2.00	HRS	1,164.00	0.00	1,164.00	
<input type="checkbox"/>	X	Others	3.00	165.000	2.00	HRS	990.00	0.00	990.00	
		BBAHC Dental traini								
Totals :							23,749.00	0.00	23,749.00	

You may enter as many line items for each expense category. Enter the budget line item details as follows.

Srl	Field	Description
1.	Description	Invoke the lookup to view and select the desired line item. On selection of the line item, the system will display the respective line item description. If none of the displayed line items match the description you wish to enter, you may select 'Others'. However, if you select 'Other', the system will display a text box below the description to enable the user specify the detail description of the line item as shown in the above example (marked in red).
2.	Qty	Enter the required quantity. If you are only entering match amounts, leave the field blank.
3.	Unit Rate	Enter the unit rate. If you are only entering match amounts, leave the field blank.
4.	Units	Enter the number of units. If you are only entering match amounts, leave the field blank.
5.	UOM	Enter the Unit of Measure code. Invoke the lookup to view and select the desired UoM code. If you are only entering match amounts, leave the field blank.
6.	Total	Computed and displayed by the system as (Quantity * Unit Rate * Units)
7.	Amount	Enter the amount of funds requested from the grant for each expense category line item.
8.	Grantee Contribution	Enter the amount of grantee contribution (match) for each expense category line item
9.	Total	Computed and displayed by the system as (Amount + Cash (or Grantee Contribution) + 'Inkind')
10.	Narrative	Enter line item narrative, if required. Click on the  icon to enter any narrative.

Once you are done entering all the line items for the respective expense category, click on 'Save'. On selection of 'Save', the system saves the line item information and displays the next expense category screen. If you do not have any expenses against a displayed expense category, you may skip to the next expense category by clicking on the navigation buttons  at the top of the screen.

Note on Quantity, Unit Rate & Units

Depending on how the expense categories are configured, the system will expect you to enter quantity, unit rate and units or quantity and unit rate or unit rate and units.

There are some categories that are configured as composite expense categories (that is, dependent on some other expense category). For those categories, you need to enter the unit rate and the units will be displayed by the system from the relevant composite expense category. You may change the displayed units, if required. An example of a composite category is Fringe Benefits category that is dependent on the expense category – Salary & Wages.

3.3.1.5.2 Purpose Area Budget Detail

Based on the requirements of the grant program, the budget details entered may require a break out of amounts among various purpose areas configured for the grant program. The budget details entry for purpose-area based budgets slightly differs from the budget details entry process described in section 'Budget Detail'. This section will highlight the differences in the entry process for a purpose-area based budget.

The budget detail screen for a purpose-area based screen is shown below:

Budget Form

Category : Program Expenses - Personal Services Type : Expenditure

Classification Seq. : 1 Sub Type : Direct Narrative : [icon]

Instructions : Personal Services amounts should be based upon the amount normally paid to the individual and the portion of the time that will be spent working on the project. For salaried individuals, the calculation should be the monthly salary amount times the percent of time in a month the individual will work on the project times the number of months the project will last. For hourly wage individuals, the calculation should be the hourly wage amount times the number of hours worked on the project in a

	Description	Qty	Rate	Units	UoM	Total	Amount	Grantee Contribution	Notes
<input checked="" type="checkbox"/>	Director	1.00	60.000	1,000.00	HRS	60,000.00			[+]
<input type="checkbox"/>									[+]
<input type="checkbox"/>									[+]
<input type="checkbox"/>									[+]
<input type="checkbox"/>									[+]
<input type="checkbox"/>									[+]
Totals :						60,000.00	0.00	0.00	

Cancel

Comment Line:

In the above screen, notice the additional + icon (highlighted in red) for each line item. In this screen you need to enter the Line Item description (Look-up), Quantity, Rate, Units and UOM (as applicable). The system will calculate and display the total amount based on the values entered. You cannot, however, enter the Amount and Grantee contribution columns in this screen. For entering the amount and grantee contribution click on the + icon for the respective line item entered. This will open a pop-up window as shown below:

Purpose Areas : Program Expenses - Personal Services

Del.	Description	Amount	Grantee Contribution	Line Total (60,000.00)
X	Training	20,000.00	5,000.00	25,000.00
X	Support	25,000.00	10,000.00	35,000.00
Totals		45,000.00	15,000.00	60,000.00

OK Close

In the above screen, the system allows entry of the requested amount and the grantee contribution for the applicable purpose areas ('Training' and 'Support' in the above example). The system automatically computes and displays the totals for each purpose area (25,000.00 and 35,000.00 in the above example)

and the total requested amount and grantee contribution (45,000.00 and 15,000.00), and the total for the respective line item (60,000.00).

Enter the details as required for each purpose are and click OK. The system will close the purpose area pop-up window and populate the amounts in the budget detail screen as shown below:

Budget Form

Category : Program Expenses - Personal Services Type : Expenditure

Classification Seq. : 1 Sub Type : Direct Narrative : [icon]

Instructions : Personal Services amounts should be based upon the amount normally paid to the individual and the portion of the time that will be spent working on the project. For salaried individuals, the calculation should be the monthly salary amount times the percent of time in a month the individual will work on the project times the number of months the project will last. For hourly wage individuals, the calculation should be the hourly wage amount times the number of hours worked on the project in a

Description	Qty	Rate	Units	UoM	Total	Amount	Grantee Contribution	Notes
Director	1.00	60,000	1,000.00	HRS	60,000.00	45,000.00	15,000.00	

In the above, screen the 'Amount' and the 'Grantee Contribution' columns have been auto-populated based on the corresponding entries in the purpose area pop-up screen.



The total for the amounts entered in the purpose area pop-up must match with the amount displayed in the column 'Total' for the corresponding line item, if there is a mismatch, the system will display an error message similar to the following on clicking the Save button.

Message from webpage

Row No. 1 : Line Total Amount '60,000.00' does not match with sum of Amount + Cash '70,000.00'
The difference of Qty * Rate * Units '60,000.00' and Amount + Cash '70,000.00' is '10,000.00' and exceeds threshold of \$1.

OK

3.3.1.5.3 Budget Summary

The budget summary is a no entry section. The system automatically displays the summarized details for each expense category. To view the budget summary, select the section by clicking on the 'Show Tree' button in the budget section of the application. Illustrated below is an example of the Budget Summary screen.

Description	Total	Amount	Grantee Contribution	Narr.
DIRECT EXPENSES				
Program Expenses				
Personal Services	23,749.00	0.00	23,749.00	
Travel	84,514.00	84,514.00	0.00	
Contractual	12,360.00	12,360.00	0.00	
Supplies	3,440.00	2,000.00	1,440.00	
Equipment	1,000.00	0.00	1,000.00	
Sub-Grants				
Administration	26,714.00	5,018.00	21,696.00	
Total Program Expenses	151,777.00	103,892.00	47,885.00	
TOTAL DIRECT EXPENSES	151,777.00	103,892.00	47,885.00	
TOTAL EXPENDITURES	151,777.00	103,892.00	47,885.00	

Buttons: Save, Save+, Validate, Errors, PDF, Copy, Show Tree, Cancel

Comment Line: _____

Click on the expense category link (marked in red) to navigate to the budget line item detail screen of the respective expense category.

Click on the narrative icon to view the narrative for the respective expense category. If the narrative icon is disabled () , it denotes that no narrative has been entered for the respective expense category and you will not be able to click on that icon. To enter a narrative you will have to go to the budget line item detail screen.


3.3.1.5.4 Purpose Area Budget Detail and Summary

If based on the requirements of the grant program, the budget has been configured as a purpose-area based budget, then the system displays Purpose area detail and summary screens in the Budget section. These screens are view-only screens and do not allow any entry / edits from the user.

There is one detail screen displayed for each purpose area configured as shown below.

Purpose Area Detail			
Category: Training			
Description	Total	Amount	Grantee Contribution
Personal Services			
Director	25,000.00	20,000.00	5,000.00
Travel			
Airfare	1,500.00	0.00	1,500.00
Contractual			
Rental - Training Facilities	5,000.00	0.00	5,000.00
Supplies			
Training Books	4,000.00	2,000.00	2,000.00
Training Supplies	2,000.00	500.00	1,500.00
Sub Total for Supplies	6,000.00	2,500.00	3,500.00
Equipment			
Computerized Welding Simulator	25,000.00	15,000.00	10,000.00
Administration			
Grand Total for Training	68,000.00	42,500.00	25,500.00

Comment Line:

The above screen displays the purpose area details for the configured purpose area – Training. The system computes and displays the totals – ‘Total Amount’, ‘Amount Requested’ and ‘Grantee Contribution’ for each purpose area. Clicking on the  icon in the above screen will navigate you to the purpose area details screen for the next purpose area.

The screen below displays a summary of all configured purpose areas for the grant program.

Purpose Area Summary			
Description	Total	Amount	Grantee Contribution
Training	68,000.00	42,500.00	25,500.00
Support	57,000.00	43,500.00	13,500.00
Totals	125,000.00	86,000.00	39,000.00

The system displays summarized totals for each purpose area for all expense categories and also computes and displays the totals across all purpose areas. Clicking on the purpose area link in the above screen will navigate to the purpose area details view for the selected purpose area.

3.3.1.5.5 Sources of Funds / Funding Sources

The funding sources screen (if applicable for the grant program) allows entry of various sources of funds and the corresponding amounts for grant requested and grantee contribution (if any). To view the budget

summary, select the section by clicking on the 'Show Tree' button in the budget section of the application. Illustrated below is an example of the funding sources screen.

Sources of Funds					
Del.	Description	Amount	Grantee Contribution	Total	Narr.
TOTAL EXPENDITURES		103,892.00	47,885.00	151,777.00	
X	State Agreement	103,892.00	0.00	103,892.00	
	Other				
X	Other Sources <input type="text"/>	0.00	27,000.00	27,000.00	
	Local Fees and Taxes				
X	Other Sources <input type="text"/>	0.00	20,885.00	20,885.00	
	Funds from NPO				
X	<input type="text"/>	0.00	0.00	0.00	
Totals		103,892.00	47,885.00	151,777.00	
Comment Line: <input type="text"/>					

Once you have completed all the expense categories in the budget detail section, the system will display the corresponding amounts as 'Total Expenditures' in the funding sources screen. In this screen you can enter the sources for various funds under the Amount (requested) and Grantee Contribution columns. The system will automatically compute and display the totals.

Clicking on the narrative icon in the above screen will allow entering any narrative information for the corresponding funding source. When this icon is clicked the system will display the following pop-up icon.

Clicking on the notes icon in the above screen allows entering note for the details of various funding sources selected.

Any number of sources of funds may be entered. The screen initially displays three blank rows for entry. If all three rows have been entered, you may click on the Save button. This will cause the system to save the information entered thus far, and also display the page with three more blank rows. This process may be repeated the required number of times to enter information for all sources of funds.

3.3.1.6 Work Plan Section

Grant application supports entry of a work plan to facilitate the planning of various goals and objectives. An example of a work plan section has been shown below.

In the work plan section you can enter the project Objectives and Activities for each objective. Click the icon next to the objective to add multiple Objectives. Click the icon next to Activity to add multiple activities under one objective. Remember to click the button for each activity, after entering the details for the respective activity.

The activities and objectives may be deleted by clicking on the corresponding icon. Please note that deleting an objective will also delete all activities defined under it.

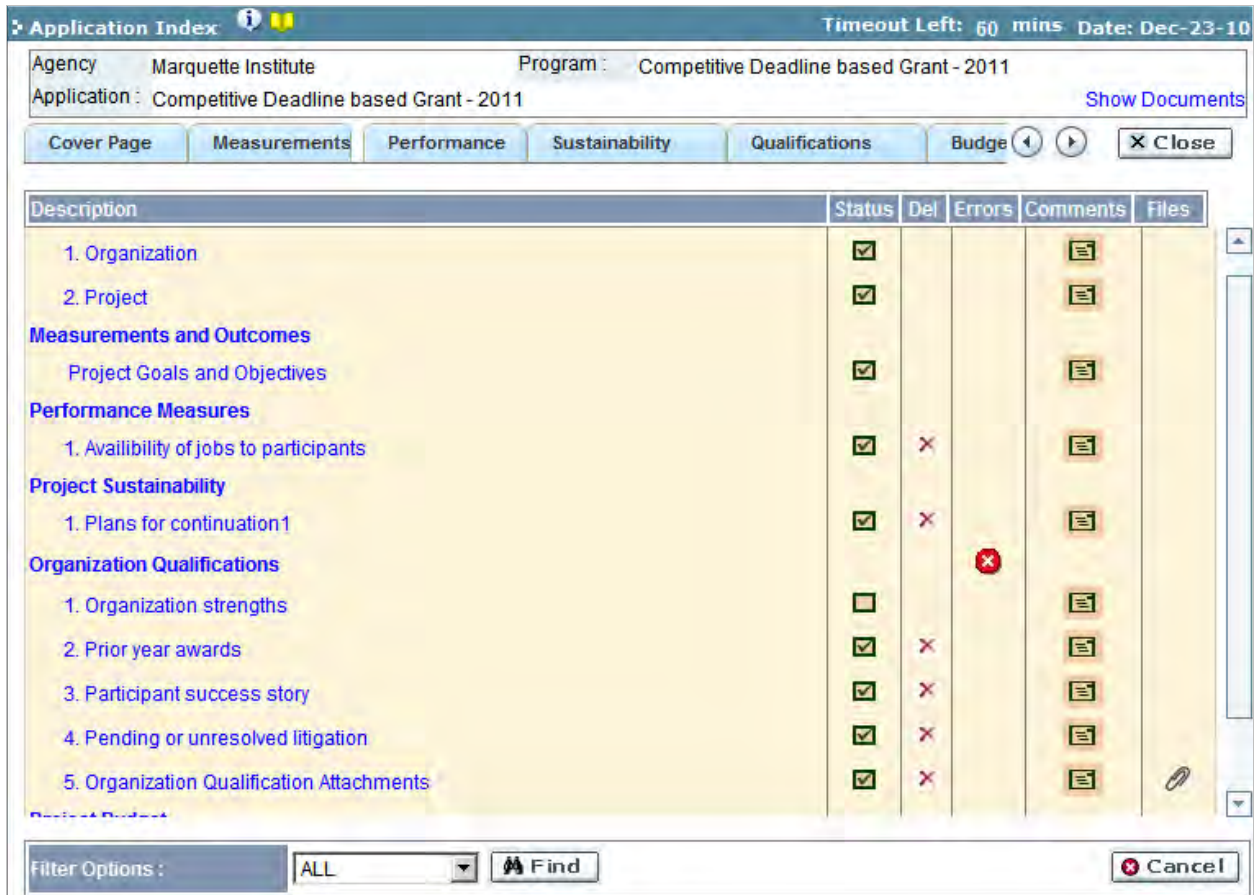
The following table lists the details of the fields to be entered in the work plan section

Srl	Field	Description
1.	Objective	Enter objectives of the proposed project. Any number of objectives may be added by clicking 'Save' and then clicking on the + icon adjacent to the Objective label.
2.	Activity	Enter activity for the current objective. Any number of activities may be added for each objective by clicking 'Save' to save the data for the current activity and then clicking on the + icon adjacent to the Activity label.
3.	Responsible Staff	Enter the name of the person responsible for conducting the activity being entered.
4.	Timeline Indicator	Select from 'Date Range' / 'Date' for the activity being entered. If 'Date Range' is selected, the system will require the fields 'From

Srl	Field	Description
		Date' and 'To Date' to be entered. If 'Date' is selected, the system will expect only the 'From Date' to be selected and raise an error if the 'To Date' is entered.
5.	From Date	The expected start date (MM/DD/YYYY) of the activity being entered.
6.	To Date	The expected end date (MM/DD/YYYY) of the activity being entered. This date should be entered only if Timeline Indicator has been selected as 'Date Range'.
7.	Outcome Applicability	Select if an outcome is expected and is to be stated for the activity being entered.
8.	Expected Outcome	Enter the expected outcome for the activity being entered. This field should be entered only if Outcome Applicability has been selected. The system will give an error in the following cases: i. 'Outcome Applicability' has not been selected but an 'Expected Outcome' has been entered. ii. 'Outcome Applicability' has been selected but an 'Expected Outcome' has not been entered.
9.	Measurement	Enter the measurement criteria for determining the success for the activity being entered. This field may or may not be entered
10.	Attachment	Click on the Browse button to select an attachment for the activity being entered. Note: The attachment field is configurable and may or may not be applicable for the grant program. Further, the attachment field may be displayed after the Objective (and not Activity), based on the configuration for the grant program.

3.3.1.7 Index page

You can click on the 'Index' tab to view the progress of your application at any time as follows.



The above screen shows that data has been entered in all sections that are marked as checked in the Status column. It also tells us that an external document has been attached for the application section 'Organization Qualification Attachments. Clicking on the attachment icon will open and display the corresponding attachment

The screen also shows that the section 'Organization strengths' has errors, as indicated by the icon. Clicking on this icon will display the errors window with the respective error details.

3.3.1.8 Checking for Errors

EGrAMS has built-in validation that validates each section of the grant application for consistency and against the pre-configured business rules. You will not be allowed to submit your application unless your application is error free. You can validate your application for errors at any time. The system validates the section you are currently in, in the data entry mode.

To make sure that all your sections are validated, you may click on each section tab and select 'Done'. The system will validate the respective section and display the appropriate informational message. Correct the errors and click on 'Done'. Repeat the validation process for each section of your application by clicking on the respective section tab and then selecting 'Done'.

3.3.1.9 Troubleshooting

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

NOTE: Since EGrAMS is a highly configurable application and most of the business rules are user defined, it may not be possible to identify every single error that may be generated by the system. The errors below are related to a sample grant program.

3.3.1.9.1 Face sheet Errors

Listed below are representative errors that may be encountered in the face sheet – agency section of your grant application and the necessary corrective actions.

Srl	Error	Description	Corrective Action
1.	No demographic information found	Agency name, address, etc in face sheet not entered	Enter demographic information in Face sheet and 'Save'
2.	Federal Id cannot be blank	Federal Id not entered in face sheet	Enter federal id in face sheet
3.	Federal id specified in the face sheet does not match the id in agency info	The federal id entered in the face sheet is not the same as that entered in your agency profile	Ensure that the federal id is correct. If the federal id entered in your grant application is correct, update the federal id in your agency profile and vice-versa.
4.	Agency Name cannot be blank	Your agency name in the face sheet is blank	Enter your agency name in the face sheet
5.	Address Line 1 cannot be blank	Your street address in the face sheet is blank	Enter your agency street address in the face sheet
6.	City cannot be blank	Your agency city in the face sheet is blank	Enter your agency city in the face sheet
7.	Zip 1 cannot be blank	Your agency zip code 1 in the face sheet is blank	Enter your agency zip code 1 in the face sheet
8.	Agency Type cannot be blank	Agency type in the face sheet is blank	Select your agency type from the available choices
9.	<state code> is not a valid state code	The entered state code in the face sheet section is not a valid state code	Enter a valid state code on invoke the lookup to view and select a valid state code in the face sheet
10.	<zip code> is not a valid zip code	The entered zip code is not valid. i.e. it may be less than 5 characters for zip1 or less than 4 characters for zip2 or it may not be numeric	Enter a valid zip code in the face sheet that meets the validation criteria specified in the description of the error
11.	In section <section no> enter question value for <question title>	You have not responded to question <question title>	Please respond to question <question title> in the face sheet

Srl	Error	Description	Corrective Action
12.	In section <section no> enter the required text for <text title>	You have not entered any information for <text title>	Please enter the required text for <text title> in the face sheet
13.	In section <section no> enter the required numeric value for <numeric title>	You have not entered any information for <numeric title>	Please enter the required numeric value for <numeric title> in the face sheet
14.	In section <section no> enter the required year for <year title>	You have not entered the year for <year title>	Please enter the required year in yyyy format for <year title> in the face sheet
15.	In section <section no> enter the required date for <date title>	You have not entered any information for <date title>	Please enter the required date for <date title> in the face sheet
16.	In section <section no> please select a value for <section title>	You have not entered any information for <section title>	Please enter or invoke the lookup to view and select a valid value for <section title> in the face sheet
17.	In section <section no> invalid data <entered value> is entered for <section title>	You have entered invalid information for <section title>	Please enter or invoke the lookup to view and select a valid value for <section title> in the face sheet
18.	County(ies) selected <county list> that do not belong to your agency	One or more of the selected county(ies) are not the county(ies) that are served by your agency	Ensure that the county(ies) selected are correct in the face sheet. If the county(ies) entered in your grant application are correct, update the county(ies) served in your agency profile and vice-versa.
19.	No data entered for fields in section 1 <section 1 title>	No information entered for section 1 of the face sheet	Enter all the required information in <section 1> of the face sheet

3.3.1.9.1.1 Facesheet – Projects Errors

Listed below are representative errors that may be encountered in the face sheet – project section of your grant application and the necessary corrective actions.

Srl	Error	Description	Corrective Action
1.	Project name cannot be blank	Project name in face sheet is blank	Enter project name in face sheet
2.	Implementing agency name cannot be blank	You have responded 'No' to the question 'Is Implementing Agency	Enter the implementing agency name in the

Srl	Error	Description	Corrective Action
		Same'. If your response is 'No', the system expects you to enter the name of the implementing agency	face sheet
3.	Fiscal year start date <fiscal year start day> must be between 01-31	The entered day for the fiscal year start day is not valid for the respective month.	Enter a valid fiscal year start day in the face sheet. The day entered should be valid with respect to the selected month. e.g. for Jan the day should be between 0-31, for Feb it should be between 0-28 or 29 if a leap year, etc.
4.	Funds requested <requested funds> should be greater than 0 and less than available grant amount <available grant amount>	The funds requested is either less than or equal to zero OR greater than the available grant amount	Enter a valid amount for the funds requested that is greater than 0 and less than available grant amount <available grant amount> in the face sheet
5.	Funds requested <requested funds> should be less than the maximum allowable amount <max requested amount>	Some grant programs may have a restriction on the maximum amount that can be requested. The amount requested by your application is greater than the maximum amount allowed by the grant program.	Enter a valid amount for the funds requested that is less than or equal to the maximum allowed amount <max requested amount > in the face sheet
6.	Funds requested <requested funds> should be greater than the minimum allowable amount <min requested amount>	Some grant programs may have a restriction on the minimum amount that can be requested. The amount requested by your application is less than the minimum amount allowed by the grant program.	Enter a valid amount for the funds requested that is greater than or equal to the minimum allowed amount <min requested amount > in the face sheet
7.	Project start date <project start date> must be greater than or equal to program start date <program start date>	The effective start date of your project is less than the grant program start date	Enter a valid project start date that is greater than or equal to program start date <program start date> in the face sheet
8.	Project end date <project end date> must be less than project start date <project start date>	The end date of your project is less than the project start date	Enter a valid project end date that is greater than project start date <project start date> in the face sheet
9.	No data entered for fields in	No information entered for section	Enter all the required

Srl	Error	Description	Corrective Action
	section 2 <section 2 title>	2 of the face sheet	information in <section 2> of the face sheet
10.	In section <section number>, field <field description>, please enter additional description	Some field selections require additional information to be entered.	Enter additional information against <field description> in face sheet

3.3.1.9.1.2 Facesheet – Contacts Errors

Listed below are representative errors that may be encountered in the face sheet – contacts section of your grant application and the necessary corrective actions.

Srl	Error	Description	Corrective Action
1.	For contact <contact name> address line 1 cannot be blank	Address line 1 has not been entered for contact <contact name>	Enter contact address line 1 for the identified contact name in the 'Contact section' of the face sheet
2.	For contact <contact name> city cannot be blank	City has not been entered for contact <contact name>	Enter City for the identified contact name in the 'Contact section' of the face sheet
3.	For contact <contact name>State cannot be blank	State code has not been entered for contact <contact name>	Enter state code or invoke the lookup to view and select the applicable state code for the identified contact name in the 'Contact section' of the face sheet
4.	For contact <contact name> zip code 1 cannot be blank	Zip code 1 has not been entered for contact <contact name>	Enter zip code 1 for the identified contact name in the 'Contact section' of the face sheet
5.	For contact <contact name> phone number cannot be blank	Phone number has not been entered for contact <contact name>	Enter phone number for the identified contact name in the 'Contact section' of the face sheet
6.	For contact <contact name> email address cannot be blank	Email address has not been entered for contact <contact name>	Enter email address for the identified contact name in the 'Contact section' of the face sheet
7.	For contact <contact name>, <state code> is not a valid state	The state code entered for contact <contact name> is not valid	Enter a valid state code or invoke the lookup to view and select the applicable state code for the

Srl	Error	Description	Corrective Action
			identified contact name in the 'Contact section' of the face sheet
8.	For contact <contact name>, <zip> is not a valid zip code	The entered zip code is not valid. i.e. it may be less than 5 characters for zip1 or less than 4 characters for zip2 or it may not be numeric	Enter a valid zip code in the contact section of the face sheet that meets the validation criteria specified in the description of the error for contact <contact name>
9.	No contact information added	You have not entered any contact information for your grant application	Enter the required contact information in the contacts section of your application
10.	Required contacts <required contact list> not entered	Each grant program required a certain number of mandatory contacts. Your application does not include all the mandated contacts	Enter the mandated contacts as identified in the <required contact list> in the contacts section

3.3.1.9.2 Narrative section Errors

Listed below are representative errors that may be encountered in the narrative or program section of your grant application and the necessary corrective actions.

Srl	Error	Description	Corrective Action
1.	Blank values not allowed for field <section title>	You have not entered the information for section <section title>	Enter the required information for the respective section <section title>
2.	You must select a response for question <question title> in section <section title>	You have not responded to section <section title>	Please select a response for section <section title>
3.	No data specified for section <section title>	The required text or attachment has not been made for section <section title>	Enter the required information or select the desired attachment for the respective section <section title>

3.3.1.9.3 Budget section Errors

Listed below are representative errors that may be encountered in the budget section of your grant application and the necessary corrective actions.

Srl	Error	Description	Corrective Action
1.	Funds requested or project cost is zero or not entered	Funds requested or project cost is zero or not entered	Please enter a valid value for funds

Srl	Error	Description	Corrective Action
			requested in the face sheet section
2.	No budget transactions entered	No budget details have been entered for the respective application	Please enter the budget for the applicable expense categories in the budget section
3.	Amount for <budget category> - <line item> should be <less / greater than> <valid amount>	For the specified budget category the minimum or maximum amount allowed is as described in <valid amount>	Please adjust the budget amount of the respective budget category to meet the described validation criteria
4.	Total for <budget category > should be <less / greater than> <max / min > % of total of <budget / expense category>	Many budget categories may have a restriction on the maximum amount permissible with respect to the budget category of total expenditures. The amount entered against the respective budget category does not meet the validation criteria	Please adjust the budget amounts for the respective budget category to meet the described validation criteria
5.	Funds requested <requested amount> does not equal budget amount <budget amount>	The amount requested in the face sheet does not equal the sum of budget amounts across all the expense categories	Verify whether the amount requested amount in the face sheet or the sum of budget amounts in the budget section is correct. If funds requested in the face sheet are correct, adjust the budgets in budget categories accordingly and vice versa.
6.	Project cost {0} does not equal budget + match amount {1}	The Project cost entered in the face sheet does not equal the sum of budget amounts + cash match + in kind match	Ensure that the sum of cash and in kind match in the budget section equals to (project cost – funds requested) in the face sheet section
7.	Total match should be >= <match percentage> % of <requested amount>	Each grant program may have mandatory minimum match requirements. The match (cash and in kind) entered in the budget section of your application does not amount to the minimum match required	Enter your cash and in kind match budgets so as to equal or exceed the minimum match requirements
8.	Total cash match should be <greater / less than> <cash	Each grant program may have mandatory minimum cash match	Enter your cash match budgets so as to equal

Srl	Error	Description	Corrective Action
	match percentage> % of <requested amount>	requirement. The cash match entered in the budget section of your application does not amount to the minimum cash match required	or exceed the minimum cash match requirements
9.	Total Cash and In kind match should be >= {0}	Each grant program may have mandatory minimum in kind match requirement. The in kind match entered in the budget section of your application does not amount to the minimum in kind match required	Enter your in kind match budgets so as to equal or exceed the minimum in kind match requirements
10.	Total Cash match should be <greater / less than> <match amount>	Some grant programs may require a minimum / maximum cash match amount. The cash match entered in the budget section of your application does not amount to the minimum cash match required	Enter your cash match budgets so as to equal or exceed the cash match requirements
11.	Additional description not entered for <budget category> - <line item>	Some line items require you to specify additional description against the respective line item	Please enter additional description for the budget category <budget category> and line item <line item>

3.3.2 Upload Application Budget

This screen allows uploading the application budget from an externally generated or manually created CSV or XML files in a format as expected by the EGrAMS system. The system allows selecting a grant program and one or more applications for the selected program, for which the application budget is to be uploaded. Budget can be uploaded only for those applications which are in a stage and status to which the user has access for uploading the budget – for example, if an application has already been submitted, the user will not be allowed to upload a budget for the application from this screen.

To access this functionality navigate to the following:

Grantee → Grant Application → Upload Budget

Invoke the grant program lookup to select a grant program. Your agency name is displayed by the system. If the selected grant program supports projects, select a project for the program. Click on the 'Find' button, the system will display the screen as in the following example:

Upload Budget Timeout Left: 60 mins Date: Nov-24-10

*Program: Competitive Deadline based Grant - 2011

*Agency: Marquette Institute


Project:

Project	Title	Stage	Status	Select	Reason
CGD-001	Application for Comp Grant	Application Entry	Pending	<input type="checkbox"/>	
CGD-11	Competitive Deadline based Grant - 2011	Application Entry	Work in Progress	<input type="checkbox"/>	

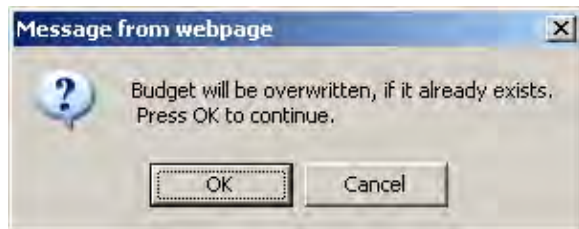
Upload File Format: XML CSV Fixed Length

In the above screen, the system displays the application(s) for the selected program. Select the application(s) for which a budget is to be uploaded. The following table provides a description of the contents of this screen:

Srl	Field	Description
1.	Grant Program	Invoke the lookup to select a grant program for which the application budget needs to be uploaded.
2.	Agency	Displayed by the system – parent agency of the signed in user.

Srl	Field	Description
3.	Project Lookup	If the selected grant program supports projects, invoke the lookup to select a project for the selected grant program.
4.	Project	Displayed by the system – project code of the corresponding grant application.
5.	Title	Displayed by the system – title of the corresponding grant application.
6.	Stage	Displayed by the system – the current workflow stage of the corresponding grant application.
7.	Status	Displayed by the system – the current workflow status for the associated stage for the corresponding grant application.
8.	Select	Make a selection if a budget is to be uploaded for the corresponding application. <input checked="" type="checkbox"/> - denotes that the application has been selected for uploading a budget. The selection checkbox is disabled (<input type="checkbox"/>) by the system if a budget cannot be submitted for the corresponding application (for example – due to your access permissions, application stage etc.)
9.	Reason	This column displays an error icon -  - if a budget cannot be uploaded for the corresponding application. Clicking on the error icon displays an error message indicating the reason.
10.	Upload File Format	Select from the available options – XML or CSV – based on the format of the file to be uploaded.
11.	Browse	Click on the browse button to invoke the select file dialog on your machine and select a file (CSV / XML) to be uploaded. The system displays the file selected and its path.

Click on 'OK' to upload the budget for the selected grant application(s). The system displays the following confirmation message:



Click 'OK' in the confirmation message dialog to continue with uploading the budget, or Cancel to return to the main screen without uploading the budget.

3.3.2.1 Errors

If you receive any errors, please refer to the table below for an explanation of the error and the corrective action that may be needed.

Srl	Error	Description	Corrective Action
1.	Please select Program	A grant program has not been selected and the Find button has been clicked.	Invoke the grant program lookup to select a grant program for which application budget is to be

Srl	Error	Description	Corrective Action
			uploaded.
2.	Please attach a budget document	The OK button has been clicked, but a budget file to be uploaded has not been selected.	Click on the browse button to select a budget file (CSV / XML) to be uploaded.
3.	Please select at least one project	The OK button has been clicked, but a grant application for which the budget is to be uploaded has not been selected.	In the 'Select' column, select the checkbox for the application(s) for which the budget is to be uploaded before clicking the OK button.
4.	Please select an XML file for upload	The 'Upload File Format' has been selected as XML, but the file selected is not XML.	Ensure that the file selected for upload is a valid XML file with '.xml' extension.
5.	Please select a CSV file for upload	The 'Upload File Format' has been selected as CSV, but the file selected is not CSV.	Ensure that the file selected for upload is a valid CSV file with '.csv' extension.
6.	Error in Line <line number> Each row should contain data in form: <record layout>	The record in the indicated line number in the file being uploaded does not match the format expected by EGrAMS.	Please see the record layout indicated in the error message and compare with the file being uploaded. You may edit the file before uploading to ensure that the record structure is as expected by the system.
7.	Data at root level is invalid	The XML file being uploaded is not in the format expected by the system.	The XML file with budget information must be in the format expected by the system. You may contact your system administrator / help desk for further assistance.

3.3.3 Print and Submit your Application

This option allows a user to review, print and submit their grant application. The information for all sections on this screen is 'Display' only - no information can be added or changed.



You need to be a Project Director (or a specifically authorized user) to 'Submit' a grant application. In addition, the application must be free of any validation errors.

To access this functionality navigate to the following:

Grantee → Grant Application → Print and Submit Application

On selection of the 'Print and Submit Application' option the system displays the following screen.

Grantee	Grant Application	Print and Submit Application	go Home Logout
Grant Application Preview		Timeout Left: 60 mins Date: Oct-01-10	
*Status:	<input checked="" type="radio"/> Open <input type="radio"/> All		
*Program:	<input type="text"/>	<input type="text"/>	go
Agency:	92-0158003	Marquette Institute	
Project:	<input type="text"/>	<input type="text"/>	×
Stages:	<input type="text"/>	Status: <input type="text"/>	×
Program	Description	Submit Date	
CGD-11	Competitive Deadline based Grant - 2011	10/7/2010 5:00:00 PM	
CGD-11	Competitive Deadline based Grant - 2011	Application Entry	Work in Progress
CGD-001	Application for Comp Grant	Application Entry	Pending

The above screen displays your agency's federal id and name in the search section of the screen.

It also displays grant programs and last submission date and time for the respective grant program. For each grant program, the system displays grant applications for that grant program, for which the user has access.

Select the grant application you wish to preview. On selection of the grant application, the system displays the following screen.

3.3.3.1 Application Preview Sections

Before we get into the details of application preview, let us understand the various components of the screen. The above screen is divided into five sections.

3.3.3.1.1 Application Preview Header

The application header section is standard across all the pages of the grant application. On the first line it displays the section you are on. It also displays the agency name, program name and the project name. Illustrated below is an example of the application preview header section.

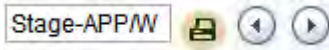
Select the 'Close' option in the header section to close the Application Preview screen and return to the application listing screen.

Click on the Show Documents link, to view a list of any help / instructional documents associated with the grant program. Clicking on the Show Documents link displays the 'Documents' section on the screen.

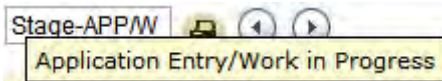
Clicking on any of the documents listed in the 'Documents' section, opens the document in the respective editor (for example, MS Word for .DOC files).




3.3.3.1.2 Controls

The Controls section displays the various controls supported by the preview screen. The Controls section is standard across all the pages of the grant application. Illustrated below is an example of the controls section.



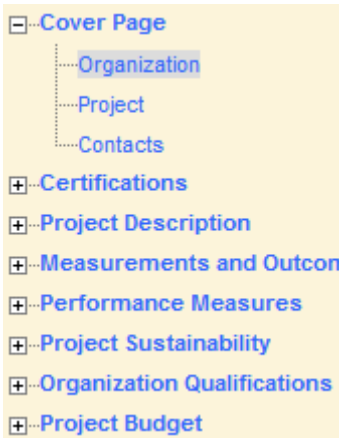
Placing your mouse over or just below the control displays a brief tool tip for the control as shown below:





Click on the  icon to print your grant application. Use the navigation buttons   to go to the next and previous pages of your application.

3.3.3.1.3 Table of Contents

The 'Table of Contents' section displays the various sections and subsections in your application. Illustrated below is an example of the table of contents section.



Click on the  icon to view the details subsections within a section. Click on  to collapse the displayed subsection details.

3.3.3.1.4 Content

The content section displays the related content as selected in the 'Table of Contents' section. Illustrated below is an example of the content section.

1. Organization Information	
a. Organization Name	Marquette Institute
b. Organizational Unit	
c. Address	P.O. Box 4006
d. Address 2	
e. City	Marquette State MI Zip 1 49855 Zip 2
f. Federal I.D. Number	92-0158003 DUNS Number AEC07269
g. Agency's fiscal year (beginning month and day)	Oct - 1
h. Agency type (please check one)	<input type="radio"/> Private, Non-Profit <input type="radio"/> For-Profit <input checked="" type="radio"/> Public <input type="radio"/> UNIVERSITY

3.3.3.1.5 Options

The 'Options' section displays the available options for the current grant application. The options are based on the current stage and status of your application. In addition, a user should have the adequate access permissions (project director) to view the available options.



3.3.3.2 Review your Application

The default mode of the application preview screen is 'Review'. A user may review by using the navigation controls or selected the respective section / subsection from the Table of Contents. However, a user can review sections that he or she has access to. Trying to review a section a user does not have access to will result in the informational message 'You do not have access to this section', and the system will not populate that section in the Content section of the screen.


The Preview option displays the details of the entire section / subsection. Illustrated below is an example of the preview of the Budget Detail.

Agency: 92-01580b3 Marquette Institute Close


Program: Competitive Deadline based Grant - 2011 Competitive Deadline based Grant - 2011 Show Documents

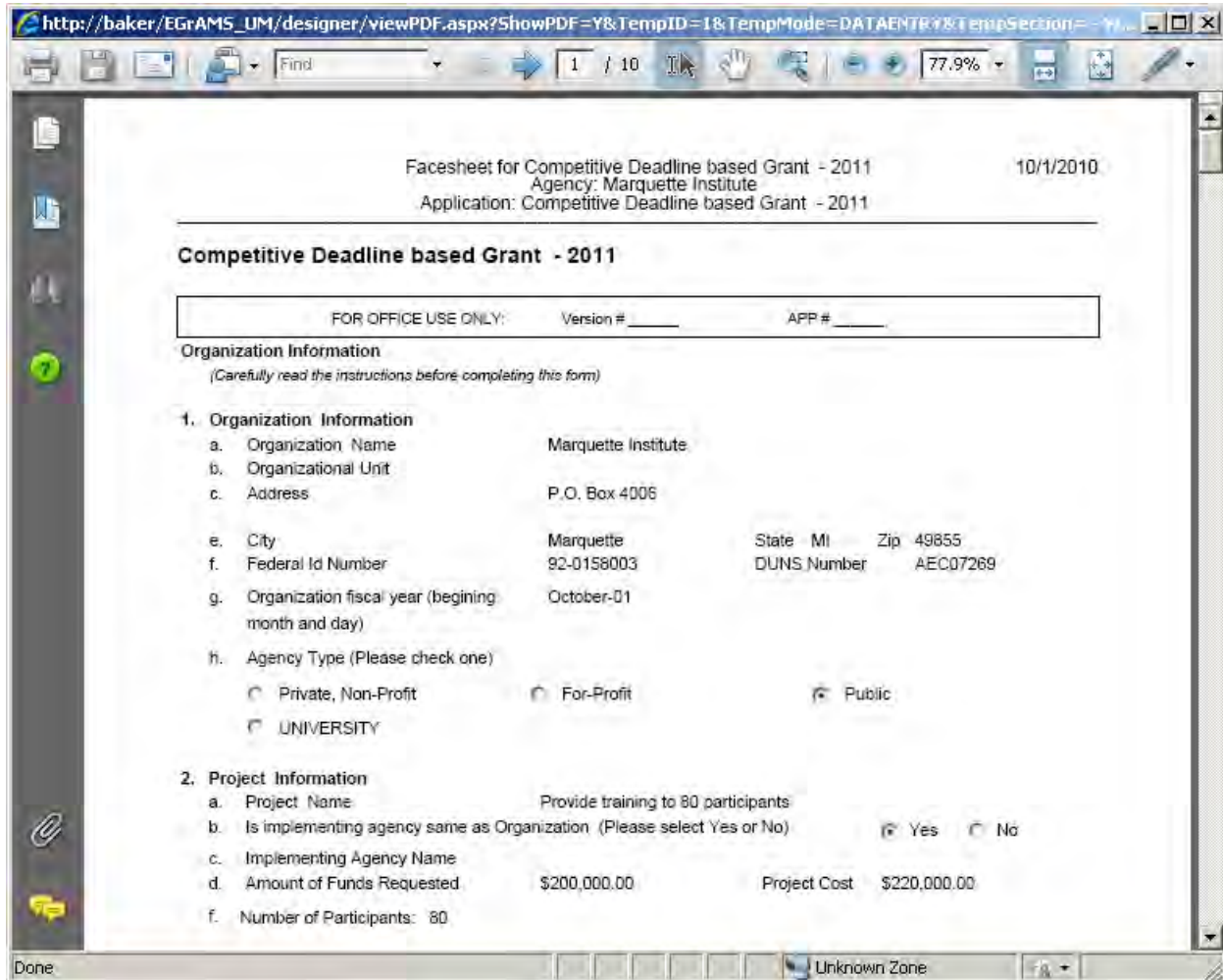
Stage-APPW	Description	Qty.	Unit Rt.	Units	UOM	Total	Amount	Grantee +Info Contribution
DIRECT EXPENSES								
Program Expenses								
Personal Services								
	Director	1.000	54.000	40.000	HRS	2,160.00	0.00	2,160.00
	Director	1.000	51.250	160.000	HRS	8,200.00	0.00	8,200.00
	Executive Secretary	1.000	24.880	80.000	HRS	1,990.00	0.00	1,990.00
	Assistant	1.000	27.420	80.000	HRS	2,194.00	0.00	2,194.00
	Physician Training Time	3.000	194.000	2.000	HRS	1,164.00	0.00	1,164.00
	Others-BBAHC Dental training Time - Dr M	3.000	165.000	2.000	HRS	990.00	0.00	990.00
	Registered Nurse	3.000	40.600	2.000	HRS	244.00	0.00	244.00
	Compliance Officer	3.000	64.000	2.000	HRS	384.00	0.00	384.00
	Coordinator / Trainer	9.000	28.000	2.000	HRS	504.00	0.00	504.00
	State Trooper	2.000	48.000	6.000	HRS	576.00	0.00	576.00
	Coordinator / Trainer	3.000	75.000	2.000	HRS	450.00	0.00	450.00
	Others-Fringe Benefits	1.000	1.000	4893.000	NOS	4,893.00	0.00	4,893.00
	Total for Personal Services	0.000	0.000	0.000		23,749.00	0.00	23,749.00
Travel								
	Others-Health Aides	1.000	38988.000	1.000	NOS	38,988.00	38,988.00	0.00
	Lodging	3.000	10020.000	1.000	NOS	30,060.00	30,060.00	0.00
	Charter	1.000	10770.000	1.000	NOS	10,770.00	10,770.00	0.00
	Travel	1.000	4696.000	1.000	NOS	4,696.00	4,696.00	0.00
	Total for Travel	0.000	0.000	0.000		84,514.00	84,514.00	0.00
Contractual								
	Others-Motivational Speaker - Fr Michael	1.000	1000.000	3.000	NOS	3,000.00	3,000.00	0.00

Validate Submit

Click on the  icon to view the notes / comments for the line item for the respective expense category.

3.3.3.3 Print your Application

Click the  icon in the 'Controls' section to print your grant application. On selection of the print icon, the system displays your application in PDF format as follows.



http://baker/EGrAMS_UM/designer/viewPDF.aspx?ShowPDF=Y&TempID=1&TempMode=DATAENTRY&TempSection=-Y...

1 / 10 77.9%

Facesheet for Competitive Deadline based Grant - 2011
Agency: Marquette Institute
Application: Competitive Deadline based Grant - 2011

10/1/2010

Competitive Deadline based Grant - 2011

FOR OFFICE USE ONLY: Version # _____ APP # _____

Organization Information
(Carefully read the instructions before completing this form)

1. Organization Information

a. Organization Name Marquette Institute

b. Organizational Unit

c. Address P.O. Box 4006

e. City Marquette State MI Zip 49855

f. Federal Id Number 92-0158003 DUNS Number AEC07269

g. Organization fiscal year (beginning month and day) October-01

h. Agency Type (Please check one)

Private, Non-Profit For-Profit Public

UNIVERSITY

2. Project Information

a. Project Name Provide training to 80 participants

b. Is implementing agency same as Organization (Please select Yes or No) Yes No

c. Implementing Agency Name

d. Amount of Funds Requested \$200,000.00 Project Cost \$220,000.00

f. Number of Participants: 80

Done Unknown Zone

Click the  icon to print the application to your local printer. Click on  icon to save a copy of your application in PDF format.

You may print a copy of your grant application at any time even if you do not have access to perform edits to your grant application.

3.3.3.4 Validate your Application

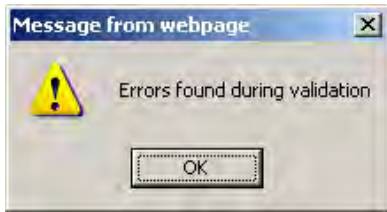
Based on the current stage and status of your application and your access permissions, you may or may not see the Validate button at the bottom of your screen.


The validate option allows you to validate your entire application before submitting it.



If you choose to Click the Submit button without validating the application, the system auto-validates the application, and does not allow submission if there are errors.

If the system finds any errors during validation, it displays the following message:




Clicking OK in the information message will display the  **View Errors** button on the screen, at the bottom. Click on this button to view the errors in your application. To make the necessary corrections, you will need to go through the 'Application Entry' menu, select the current application and make necessary corrections in the erroneous application section(s).

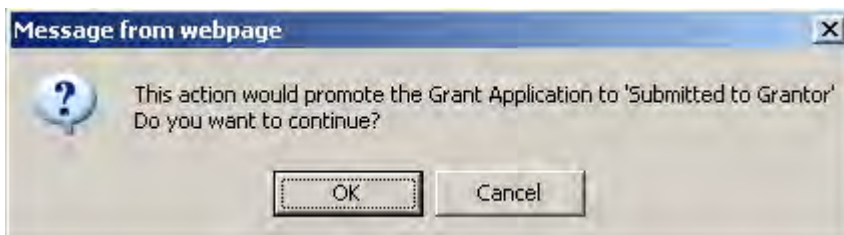
3.3.3.5 Submit your Application

Based on the current stage and status of your application and your access permissions, you may or may not see the submit button at the bottom of your screen.

The Submit option enables the user to submit their application to the next stage. Depending on the workflow configuration of your application (done by the grant administrator), the application may be submitted to an intermediate agency (Local Council or Multipurpose Collaborative Board) for a preliminary review or submitted to the grantor for further action on the application.

If the current stage / status and your access permission is valid, you will see the submit button on every screen of the Application Preview. You need to select submit only on one screen to initiate the submit action.

Click on the  **Submit** button at the bottom of your screen. On selection of the 'Submit' button, the system will display the following confirmation message.




The message displayed is based on your current stage and status.

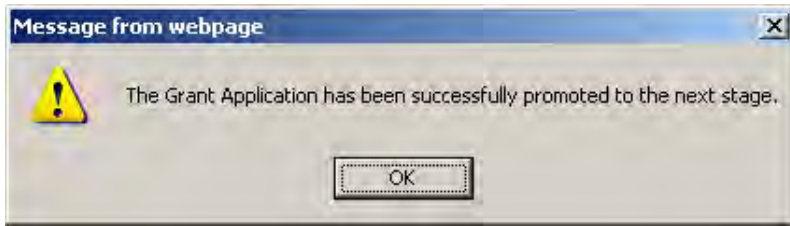
Click on 'Cancel' to cancel the submit action and return to the Application Preview screen.

Click on 'OK' to submit your application to the specified stage. On selection of OK, the system will once again validate the application to ensure that there are no errors.

If any validation errors are found, the system will display the following informational message.



You can click on the  icon at the bottom of the screen to view the errors. However, to make the necessary corrections, you will have to go through 'Application Entry'. If no validation errors are found, the system will display the following confirmation.



Click on 'OK' to acknowledge the message.



Once an application has been submitted, you will not be able to make any changes to that application, except during application revision, amendment stages based on the grant program requirements

On submission of your application, you will receive an email notification confirming receipt of your application and the date and time of receipt. An example of the email message has been shown below:



All applications must be submitted within the submission deadline. The system will not allow submission of an application after the deadline has passed, and will display the following error if you attempt to do so.

