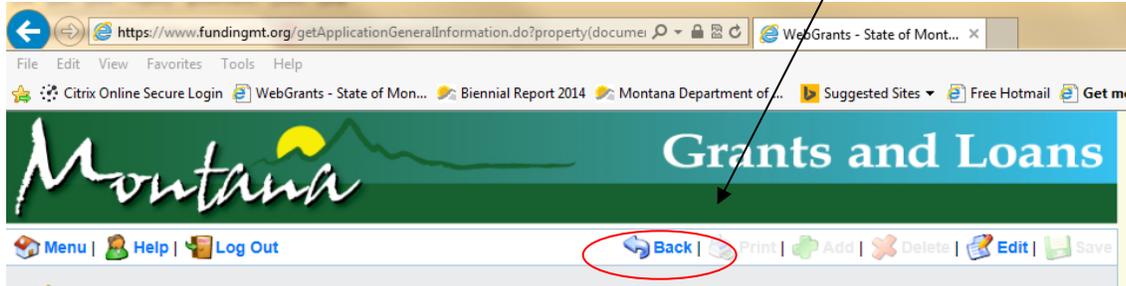# WebGrants

General Grantee Instructions

When working in WebGrants, always use the WebGrants "Back" button. Do not use the browser back arrow.

Overview

This page is an overview of the functionality in the grant management system. Please read these instructions before you begin using the system. You can also press the Help button on each page in WebGrants to get online help specific to the page you are on.

General Navigation

Navigation in the system has been standardized where possible. At the top of each page is a white bar that contains the following buttons:

Menu: Will take you to the Main Menu from any screen in the application.

Help: Will bring up an online help window that is specific to the page you are currently on. This Help page will restate many of the instructions on this page.

Log Out: This link will log you out of the application and return you to the Login page.

These buttons are active only on some screens:

Back: This is a very useful button. For the most part, it works similarly to the browser back button. But it will also return you to the main components page when you are creating Applications or down in a sub-screen. If you are feeling lost at any time hit the Back button until you return to a familiar screen.

Print: This button is active on screens that can be printed. Clicking this button will bring up a new window that will display the current screen's contents in printer friendly black and white. To print the page, go to File-Print in the browser.

Add: The Add button is available when new entries can be made. For example, use the Add button to create a new Application, to add a new budget line item, or a new Task.

Delete: This link will delete items that you have created. Delete can be used to delete an Application or a Budget line item. Pressing delete will always result in a confirmation before the item is deleted.

Edit: This link is available when the contents of the page you are on can be changed. For example, if you create a budget line item, you can edit it later with this link.

Save: This link is available when you are creating or editing something. When you are finished, you press the Save button to save it and return to the previous screen.

Main Menu

The main menu is the first page of the application when you log in. The main menu will take you to the modules of the application. Each module is explained below:

Instructions:
This link displays a high-level instructions page describing all the screens in the application.

Funding Opportunities:
This link displays all currently posted opportunities, you may create and submit applications for each opportunity.

My Applications:
All previously created applications can be found in this module.

My Grants:
All grants can be found here, you can also create status reports, request claims and communication with the grantor in this module.

My Profile:
You can update your contact information in this module.

Funding Opportunities/Application Creation

The Funding Opportunities module will display all grant announcements from grantors.

Clicking on this module will display a list of currently posted opportunities. The deadline column displays the due date of the application. You will be unable to submit an application after this date. Click on an opportunity's title to view the contents of the opportunity.

The following page will display the funding opportunity details. If you have additional questions about this opportunity, you may call or email the Program Officer listed at the top. To view an attachment, click on the attachment's name. You can then view the attachment immediately or save it to your computer. To view the external web links, click on each web link.

To apply for an opportunity you have two choices. Either apply with a new application or you can apply with an existing application. To apply with a new application click the link Apply with New Application in the upper right hand corner of the opportunity. To apply with an existing application click the link Copy Existing Application in the upper right hand corner of the opportunity.

If you wish to reuse an old application, click the link above, the next page will display a list of applications you have previously created under the same program area. If you do not see any applications, then you have not created an application for this program area in the past and you will be unable to reuse an old application. If you see a list of applications, click on the radio button next to the application you wish to reuse and click the save button in the upper right hand corner of the screen. This action will copy the contents of this old application into a new application in response to the new opportunity.

Either way, you will eventually arrive on the general information screen. Here, you can enter or edit the application's title and select the project director. When you have finished, click the save button in the upper right hand corner of the screen. This will refresh the screen and display the data you just entered as read-only. If you want to edit the data again, click the edit button in the upper right hand corner of the screen. If you have finished with this component, click either Mark as Complete

or Return to Components. Mark as complete will mark this component as complete. All components must be marked as complete before you can submit the application. You may still edit the component even if you have marked it as complete. The return to components link will return you to the components page without marking the component as complete.

The component page will display all the components or sections of the application. You will be required to edit all components and mark all components as complete before you can submit the application.

To preview the application on one page, click the Preview link in the upper right hand corner of the components box. This preview page indicates the format the grantor will view your application.

When all rows have received a checkmark in the complete column, you may submit the application. To submit the application click the submit button.

My Applications

The My Applications module stores all applications, past and present. The initial page will display applications with the status Editing, Submitted, Correcting, Under Review and Approved. To view applications in other statuses, click on the Archived Applications link.

Applications stored under the Archived Applications link have the status Expired, Withdrawn, Not Awarded and Awarded.

Clicking on an application's title will display the application, in black and white, in a pop-up window, if the application's status is Submitted, Under Review, Approved, Expired, Withdrawn, Not Awarded and Awarded. If the application's status is Editing or Correcting then the application's components will be displayed and can be edited.

My Grants

My Grants stores all grants past and present. The initial page displays grants with the status Underway and Suspended. Clicking on the Closed Grants link will display grants with the status Closed and Archived. Only in Underway status can you edit the grant components, for all other statuses, all components will be locked.

Clicking on a grant's title will display the grant components. Each component has a state. The state can be either locked or unlocked. If the state is unlocked then you can edit that component, if it is locked then you can view the component but cannot edit it.

The sections below detail all grant components:

Grant Information
This read-only component will display the high-level information about the grant.

Budget
This read-only component will initially display the final approved budget from the application you submitted. After submission, the grantor has the ability to amend the budget, so the version you are viewing may not be the same as the version you ultimately submitted in your application. If the grantor makes any budget amendments, you will receive notification of the changes via email.

Objectives
This read-only component will initially display the final objectives you submitted in your application.

After submission, the grantor has the ability to amend the objectives, so the version you are viewing may not be the same as the version you ultimately submitted in your application. If the grantor makes any objectives changes, you will receive notification of the changes via email. You will also receive email notifications when the due date of each objective approaches. You will continue to receive notifications, even after the due date has past, until the grantor marks the objective as complete.

Status Reports

After your application is approved and a new grant is created, a status report schedule will also be created. This schedule will list several status reports that you will be required to submit to the grantor before certain due dates. You will be sent email reminders as the due dates approach for each report. Clicking on a report's title will display the report components page. This components page is very similar to the application components page. You will be required to mark each component as complete before you can submit the report.

Claims

As your project gets underway, you will periodically need to submit reimbursement requests to the grantor. These requests can be made in the claims component. To create a new claim, click the Add button in the upper right hand corner of the screen. The claim components page will be displayed. On this page, you can click on each component and complete the required information. Be sure to mark each component as complete since you will be unable to submit the claim until all components are marked as complete.

Communication

The communication component is like an email program, with the restriction that you can only correspond with your grantor. This component is useful for the reason that all email communication can be handled within WebGrants so all records are in one place. When the grantor sends you communication, you will receive an email alert informing you of the new piece of communication. You must log into WebGrants to read it. To write a message to the grantor, click the Add button in the upper right hand corner of the screen, complete the information and click Send.

Contract Documents

You can view the contract documents by clicking the Contract Documents component. Click on the file name of the document that you want to view.

My Profile

This module allows you to edit your personal contact information, review your alerts, as well as reset your password.