Oklahoma
Office of State Finance

OK.gov OKGrants

Oklahoma Department of Commerce

Subgrantee Manual

OKGrants

Version 1

Contents

1. System Requirements

OKGrants was designed so that the vast majority of computer users will be able to use the system with little or no changes to their computer environment. The four requirements that are mentioned below are common computer elements that should be already present on most machines.

1.a. Operating System

OKGrants was designed for both of the two most common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing the system from a Macintosh environment are required to have MacOS 7.5 or higher running on a PowerPC processor. Windows users are required to have an operating system that is Windows 95 or higher.

1.b. World Wide Web Connection

OKGrants is a web site designed for and accessed via the Internet. The Internet is the more general term that is typically used to refer to the World Wide Web. The World Wide Web consists of a vast array of content that is accessible via a web browser. For the purpose of accessing OKGrants, the standard Internet connection is via a modem connection. A modem is a piece of hardware that connects to the computer to send data through a phone line to and from the computer. Internet connections that are "faster" than a modem connection, such as cable and DSL, will improve the speed at which the system operates, but are not necessary in order to use the system. If you are in an office environment, you may already have an Internet connection, but if you are unsure, please contact your organization's network administrator.

For those using a dial-up connection over a modem, it is highly recommended that you have a modem connection speed of at least 33.6 kbps (kilobits per second).

1.c. Web Browser

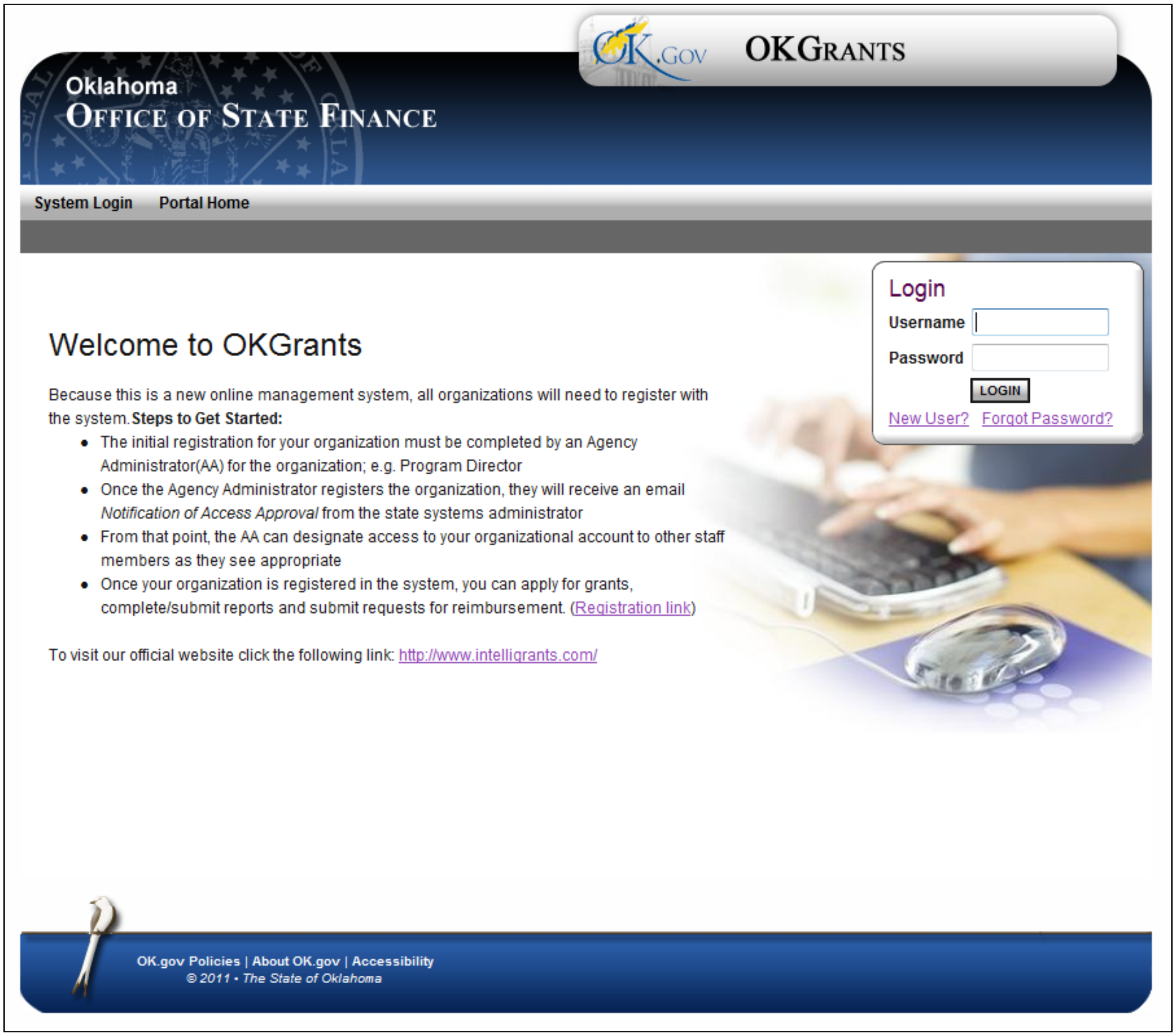
This system was designed to be compatible with common up-to-date web browsers including Internet Explorer, Firefox, Safari, and Opera.

1.d. Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat Reader you may choose to view, print, or save these documents. If you do not have Adobe Acrobat Reader you can go to www.Adobe.com and download it for free.

2. OKGrants Homepage

To access OKGrants, type https://grants.ok.gov into the address bar of your web browser and hit "Enter". The page you see should look like the image shown below.



2.a. Browser Configuration

In order to avoid various browser-related restrictions unnecessarily placed on OKGrants, please make the following configuration changes for the web-browser that you are using.

Internet Explorer

If you are using Internet Explorer, it is recommended that you add the OKGrants homepage to your list of trusted sites. To do this, please complete the following steps:

1. Click "Tools"

2. Click "Internet Options"
3. Click the "Security" tab
4. Click "Trusted Sites"
5. Click the "Sites" button
6. In the "Add this Web site to the zone:" textbox type “grants.ok.gov” and then click the "Add" button
7. Click the "OK" button, and then click the "OK" button again

3. Applicant User Types

There are four security roles defined for OKGrants users: Agency Administrators, Authorized Officials, Fiscal Officers, Writers and Viewers. These roles have different security access to work on the applications. Once the Agency Administrators are identified and their new user accounts created, the Agency Administrators will select and enter their own organization's staff names to access OKGrants. Each security role is summarized below, the first name is the name used in the statewide OKGrants system, and the name in parentheses is the Commerce role it corresponds to:

- **Agency Administrator**
  - Is the only role with access to My Organization links.
  - Has access to view all applications for the organization.
  - Is linked to all project numbers associated with the organization.
- **Authorized Official**
  - Is the only role that can submit or cancel an Application.
  - Is linked to all project numbers associated with the organization.
- **Financial Officer**
  - Has access to view the application.
  - Is linked to all project numbers associated with the organization.
  - This role will come into play with the Request for Payment. This role will have access to view, edit, and submit the request.
- **Writer**
  - Can cancel an Application.
  - Has access to edit the application.
  - Is linked to all project numbers associated with the organization.
- **Viewer**
  - Has access to view the application.
  - Is linked to all project numbers associated with the organization.

Security Roles	Controls Access to Organization	Controls Access to Application	Read	Write	Initiate Application	Submit Application	Cancel Application
Agency Administrator	X	X	X				
Authorized Official		X	X	X	X	X	X
Financial Officer			X	X			
Writer			X	X	x		x
Viewer			X				

4. User Access in OKGrants (Agency Administrators Only)

In order to use the system you must create a user account. There are two ways to get access to OKGrants.

If you are an:

Agency Administrator: Request access to the system and get approved by an OKGrants System Administrator.

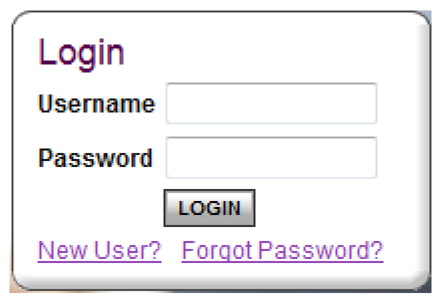
All other roles: Request access from/be added by the organization's Agency Administrator.

As Agency Administrator for the organization, you must first obtain access by following the procedure under section 4.a. Once you have obtained access to OKGrants, you can manually add additional organization members as described in section 4.b. Both processes for gaining access are described below.

4.a. Gaining access as an Agency Administrator

If your organization doesn't already exist in OKGrants, you must create a new user account. If the organization is already in OKGrants, then request access through your Agency Administrator.

To create a new user account:



1. From the OKGrants homepage click the "New User?" link located in the "Login" section.
2. Complete the user form in its entirety.
    a. Fill in all information as required. All items marked with an '*' are required to create your account.
    b. The "Username" field must consist of all letters and numbers.
    c. The "Password" field must consist of all letters and numbers and must be at least 7 characters long.
    d. The fields "Password" and "Confirm Password" must be the same.
3. Click "Save" to save the data.

NOTE: Once you have created a user account and gained access to the system, you will never have to request access again. There is no need to create a separate user account for each organization you manage within OKGrants.

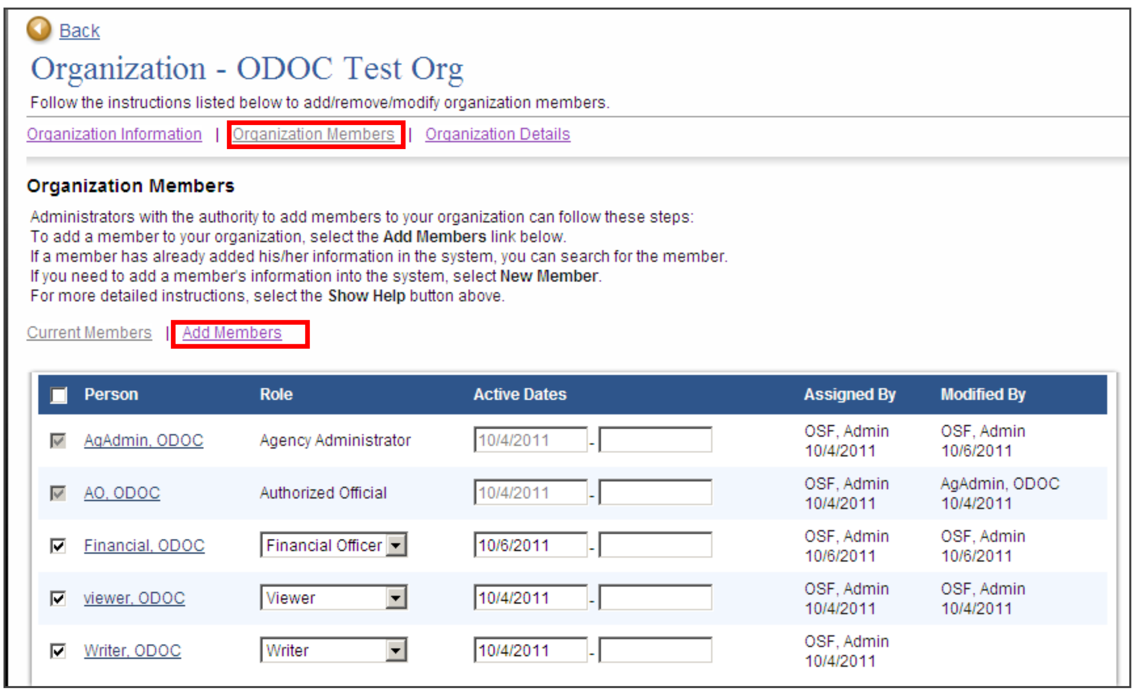
After creating your user account you must then be approved by an OKGrants System Administrator before you can access the system. If you attempt to access the system prior to getting approved/validated by a system administrator you will receive the following message:

When access has been granted to you by a system administrator you will receive an email message confirming that your account has been validated.

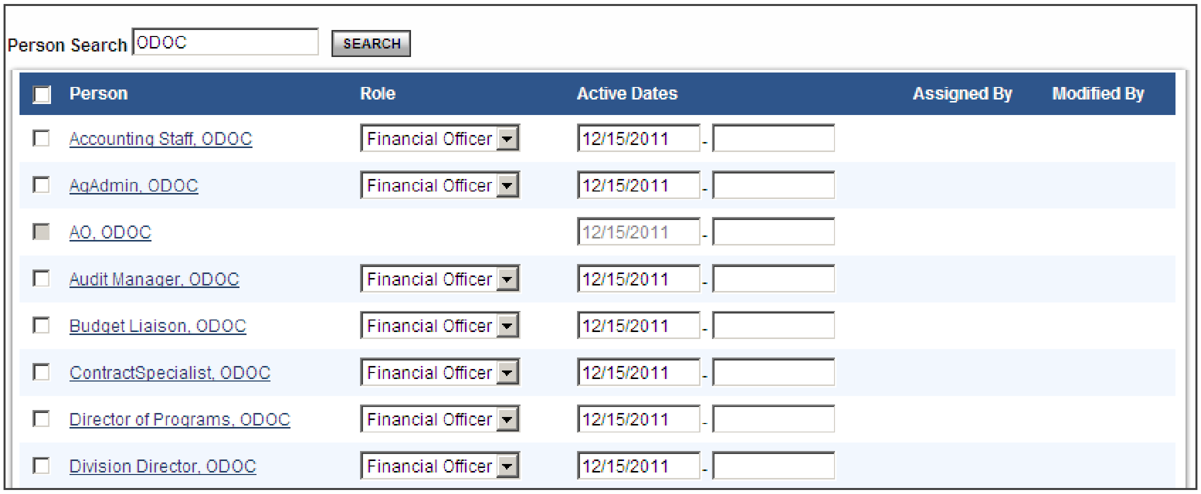
4.b. Granting access to all other users

To add a new member to an organization, follow the steps indicated.

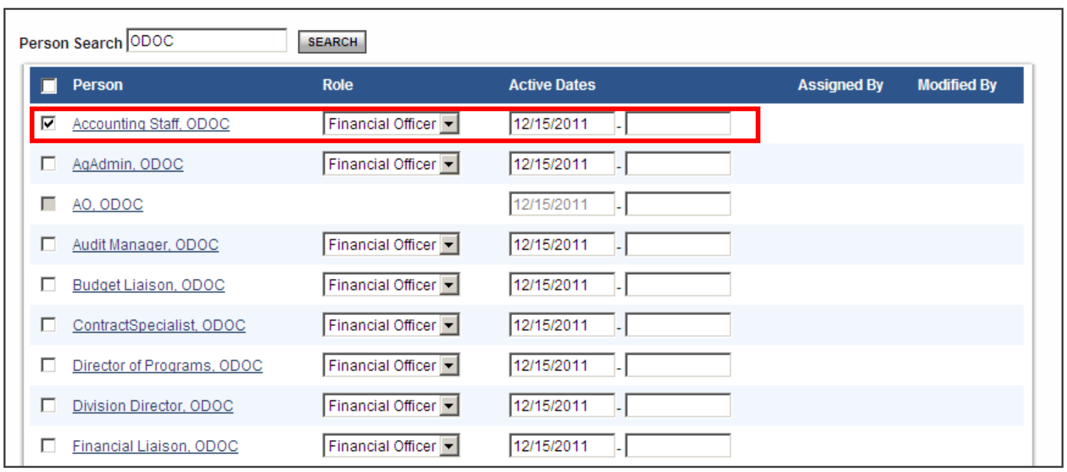
1. Click "My Organization", and then click "Organization Members.



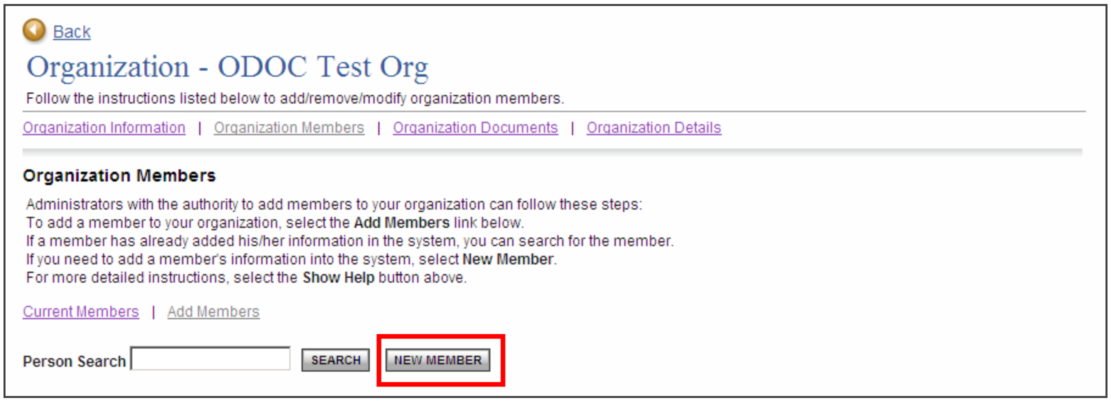
2. Click "Add Members", and a person search field appears. Type the first or last name of the person to add and select "Search." The results appear below.



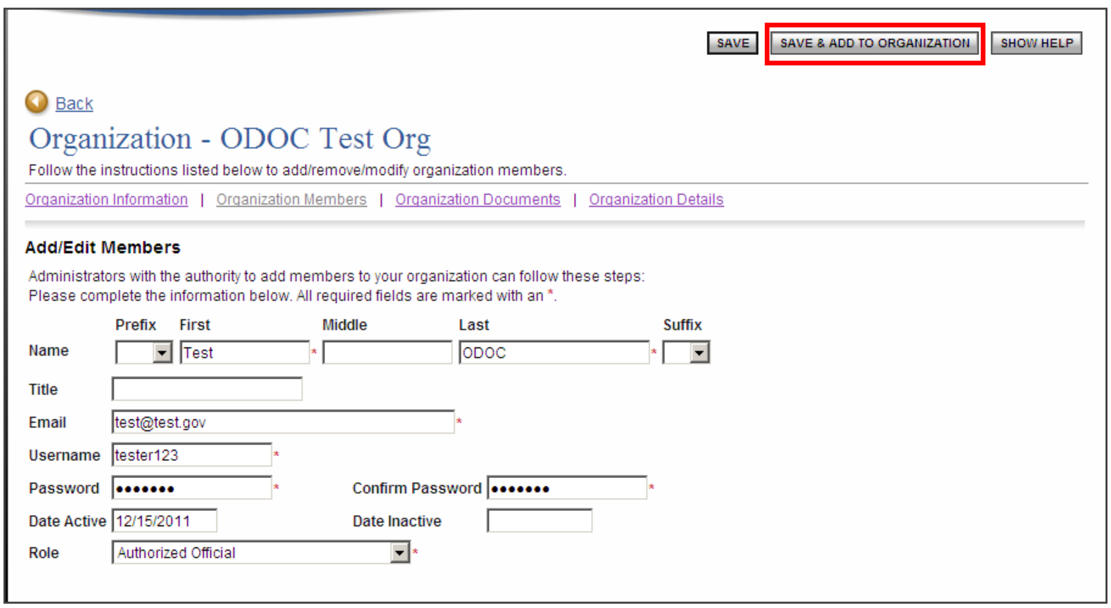
3. Place a check in the box next to the person to add. Select a role, enter an active date (beginning), and "Save." Then select "Current Members" and the person added should show with the rest of the organization's member names.



4. If the person's name does not come up in the search results, then select "New Member."



5. Enter information for the new user and "Save & Add To Organization."

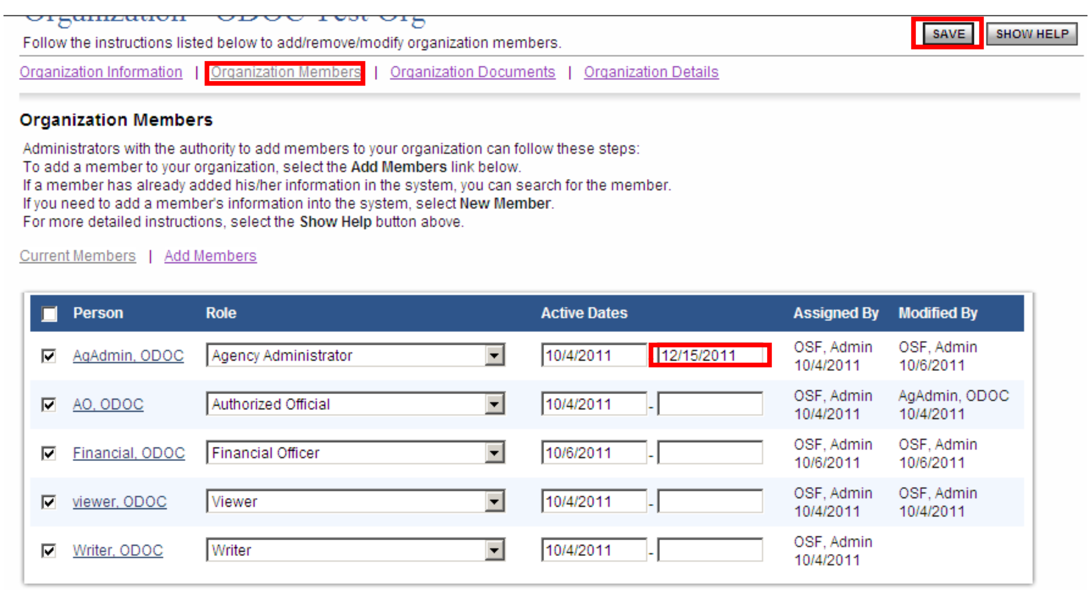


Note: "Save and Add to Organization" MUST be selected to add the new user to the organization.

4.c. Deactivating a user in the Organization

Agency administrators can deactivate a member of an organization. A deactivated user cannot access, view, or edit OKGrants information. To deactivate a user:

1. Select "Administration"
2. Select "Organization Administration"
3. Search for the organization to access and select that organization's name
4. Select "Organization Members"
5. Using the drop-down calendar, set the second "Active Dates" field to the date on which the user will no longer have access
6. Select "Save"



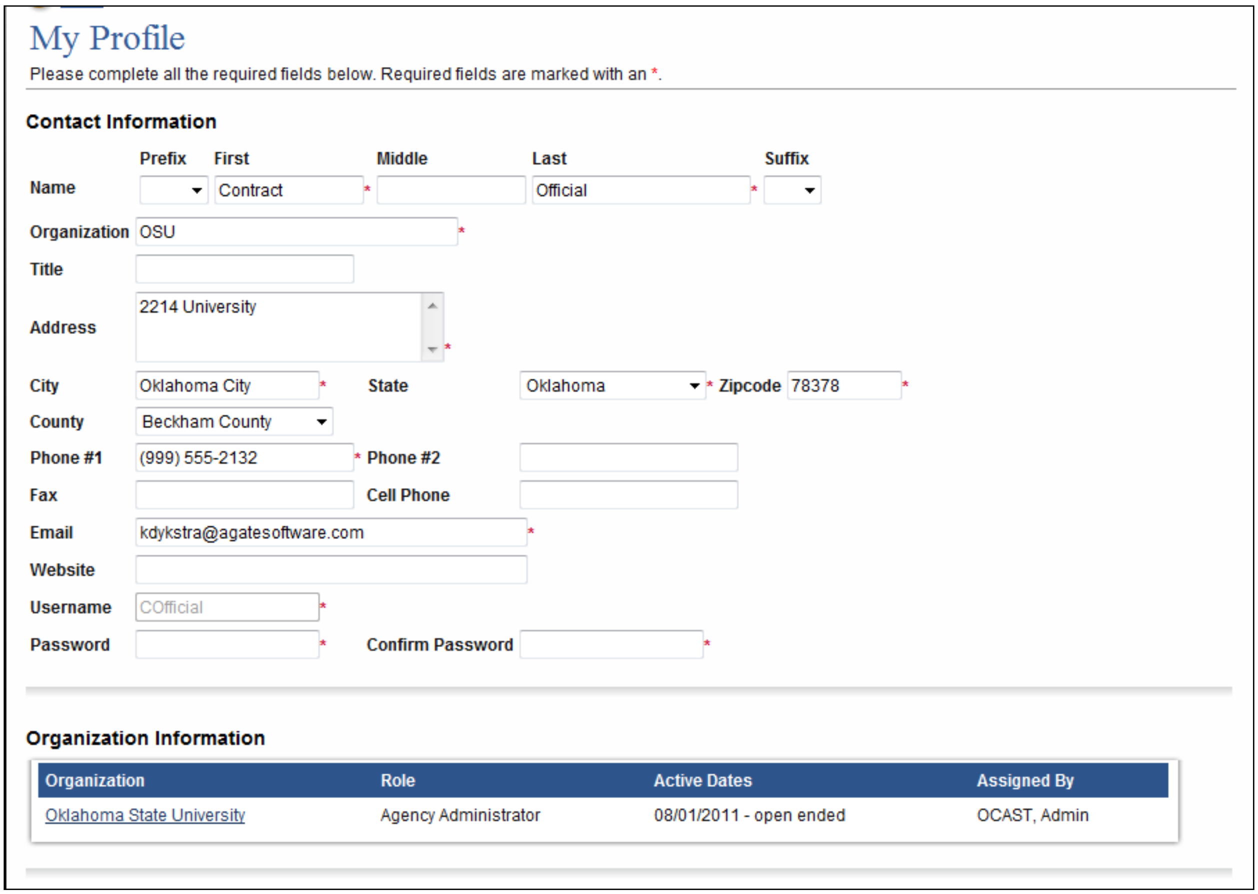
Follow the instructions listed below to add/remove/modify organization members.
SAVE
SHOW HELP
Organization Information | Organization Members | Organization Documents | Organization Details
Organization Members
Administrators with the authority to add members to your organization can follow these steps:
To add a member to your organization, select the Add Members link below.
If a member has already added his/her information in the system, you can search for the member.
If you need to add a member's information into the system, select New Member.
For more detailed instructions, select the Show Help button above.
Current Members | Add Members
Person
Role
Active Dates
Assigned By
Modified By
AgAdmin, ODOC
Agency Administrator
10/4/2011
12/15/2011
OSF, Admin 10/4/2011
OSF, Admin 10/6/2011
AO, ODOC
Authorized Official
10/4/2011
OSF, Admin 10/4/2011
AgAdmin, ODOC 10/4/2011
Financial, ODOC
Financial Officer
10/6/2011
OSF, Admin 10/6/2011
OSF, Admin 10/6/2011
viewer, ODOC
Viewer
10/4/2011
OSF, Admin 10/4/2011
OSF, Admin 10/4/2011
Writer, ODOC
Writer
10/4/2011
OSF, Admin 10/4/2011

5. Keeping Contact Information Current

In order to receive continued funding or to enter into new grant agreements, it is important that the contact information in OKGrants be as up-to-date as possible. This is done very quickly and easily in OKGrants. By keeping user records and organization records current with all of the latest changes, OKLAHOMA DEPARTMENT OF COMMERCE staff will be able to contact users appropriately when the need arises. This is especially important for Principal Investigators, as their contact information automatically populates from their profile.

5.a. Updating “My Profile”

A user may update his or her user record at any time by following these steps:



1. Click the “My Profile” link on the menu bar on the Main Menu.

2. Update the form accordingly and click the “Save” button.

5.b. Updating “My Organization(s)” (Agency Administrators Only)

When an organization’s contact information changes it is important to update that information in the system by following these steps:

1. Click the “My Organization(s)” link on the menu bar.
2. Click on the Organization that you would like to edit if more than one appears.
3. Update the form accordingly and click the “Save” button.
4. Select the Organization Details link and be sure the information on the OSF Organization Details page and any state agency pages is also current.

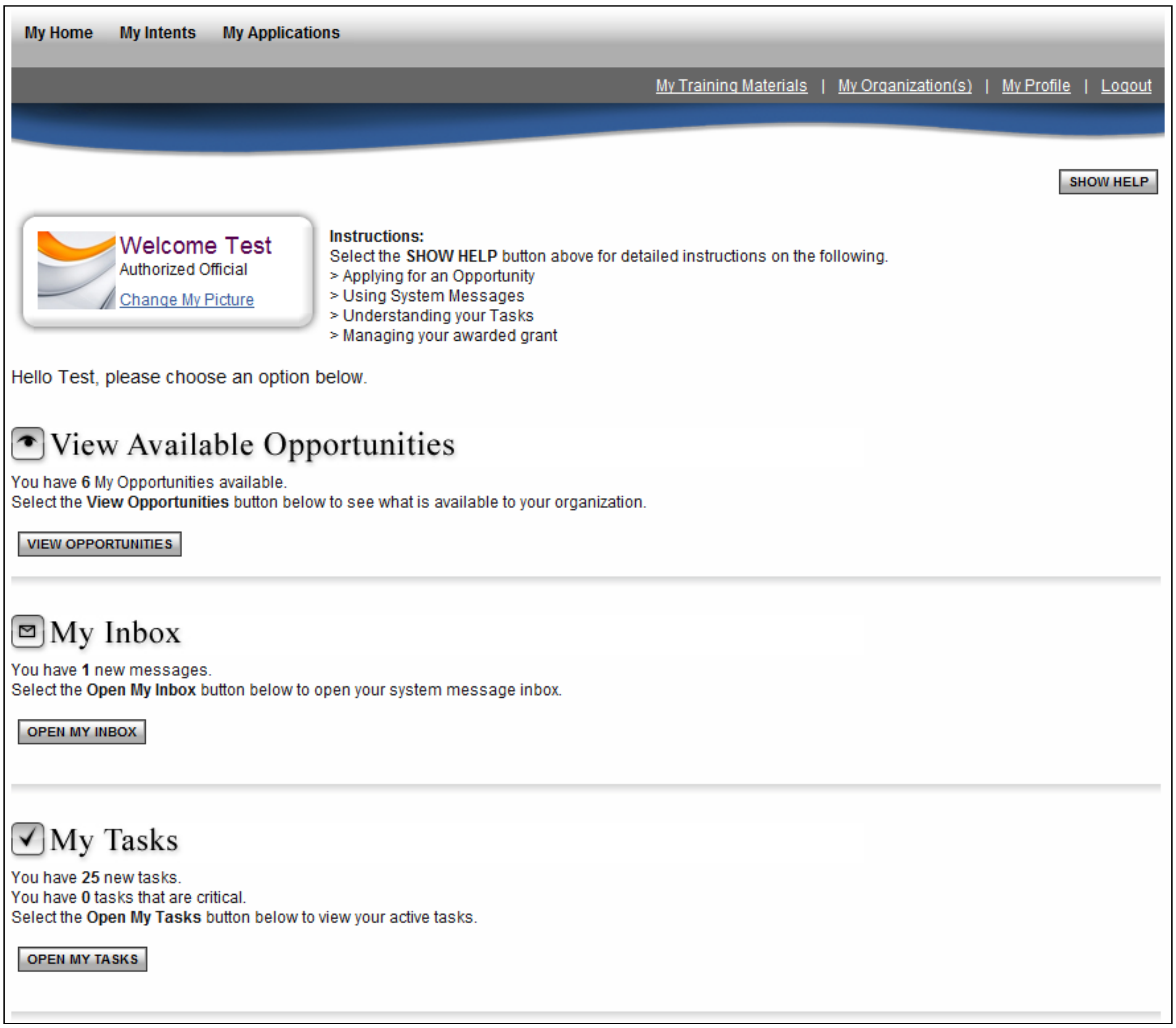
6. Home Page

The Home page is the next page seen after logging into OKGrants. From the Home page all types of documents can be accessed, such as the Applications, Reimbursements, and Required Reporting.

If an organization has not been assigned to an organization category, only the "Home" tab displays.

"View Available Opportunities" does not appear on the Home page unless a user has permission to initiate an Application and the Application is open for submission.

Likewise, when there are no active tasks to perform, "My Tasks" does not appear on the Home page. There may be times when only "My Inbox" (e-mail/messages) appears on the Home page.



6.a. Searching for Documents

The Applications, Financial Forms, and Reporting tabs allow for searching documents in the system. Search fields and functionality are the same for all tabs. This example will search for an application, but the steps are the same for all document types.

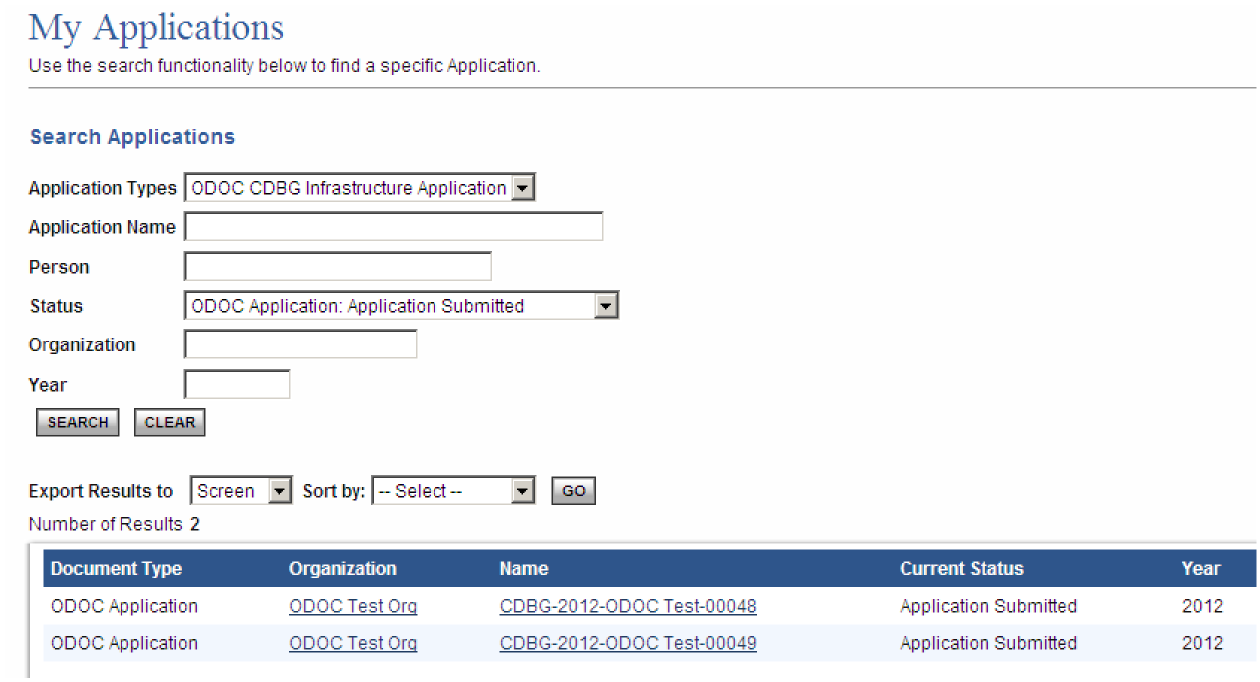
To view a list of applications:

1. Select "My Applications"
2. Select "Search," and the list displays below

To view applications by type, name, person, status, organization, or by year:

1. Select "Application"
2. Fill in the necessary information
3. Select "Search"

From the list of applications, select the one to view by selecting the name. The fields available for searching will differ based on security role.



6.b. Accessing My Inbox (E-mail/Messages)

OKGrants system e-mail/messages are sent periodically. E-mails appear both in OKGrants at My Inbox and at the e-mail address listed in the OKGrants contact information.

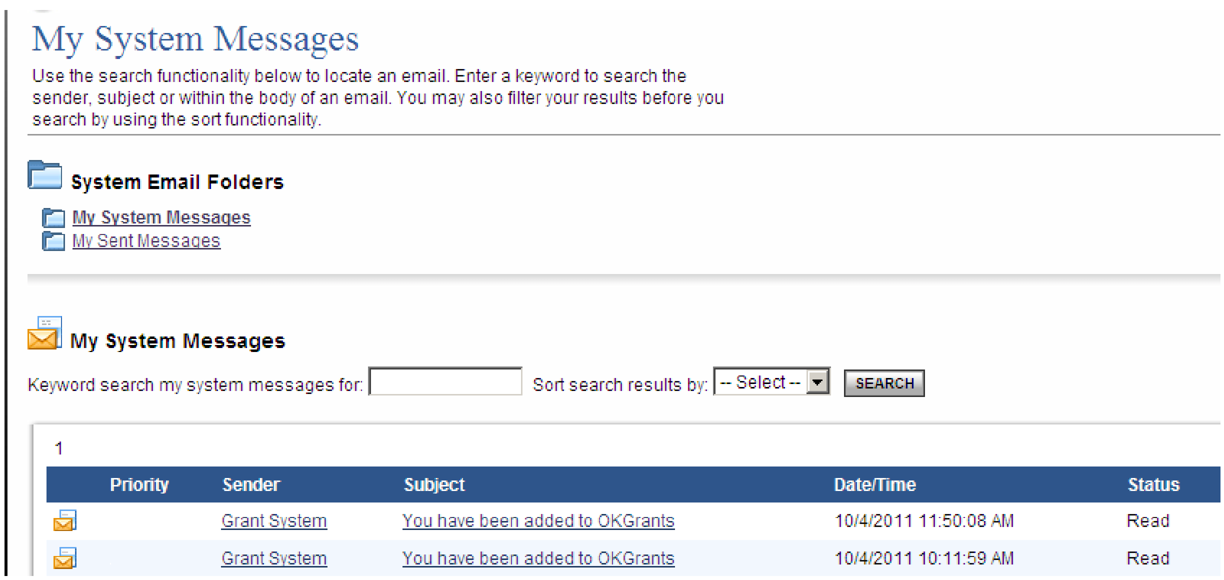
To access contents of "My Inbox," select "Open Inbox."

6.b.1 **Viewing E-mail/Messages**

All new messages (unread), if any, are displayed.

The following can be done in the Inbox:

- Sort messages by Priority, Sender, Subject, or Date/Time
- Select "View All System Messages" to see all messages going back to when system access was received
- View a message's priority status
- Select its subject link to view the message
- See date/time a message was sent
- Select a sender's name to reply to a message
- Check box at left of message to "Mark Checked As Read"



6.b.2 **Searching for E-mail/Messages**

To search for a message, select "View All System Messages." From the "System Messages" page, enter a keyword and "Search." A list of messages that match the search criteria display. Only system administrators are able to send system messages.

The following can also be done from this menu:

- Sort search results by Priority, Sender, Subject, Date/Time, or Status
- View all messages going back to when system access was received
- View a message's priority status
- Select a sender's name to reply to a message
- See date/time a message was sent

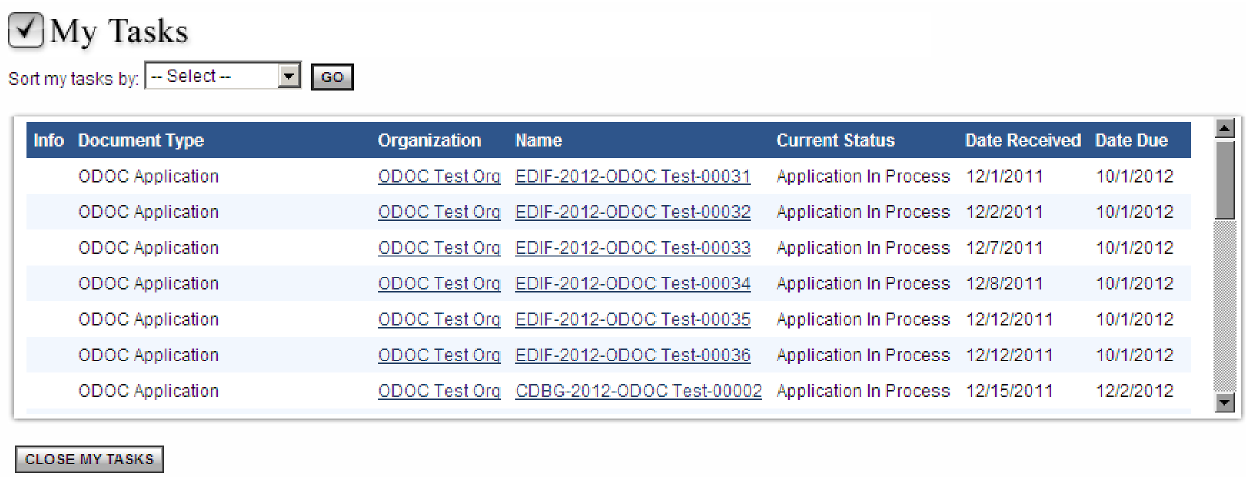
6.c. Completing My Tasks (Active Tasks)

"My Tasks" appears on the Home page when there are tasks that require action. Some of the tasks may be critical (indicated by a red Date Due).

To access documents requiring action, select "Open Tasks" and then the name of a document to go to that document's menu.

When there are no active tasks, "My Tasks" is not visible on the Home page.

Note: To access all applications that are assigned, see user guide section 4.a. Searching for Documents.



My Tasks

Sort my tasks by: -- Select -- GO

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	ODOC Application	ODOC Test Org	EDIF-2012-ODOC Test-00031	Application In Process	12/1/2011	10/1/2012
	ODOC Application	ODOC Test Org	EDIF-2012-ODOC Test-00032	Application In Process	12/2/2011	10/1/2012
	ODOC Application	ODOC Test Org	EDIF-2012-ODOC Test-00033	Application In Process	12/7/2011	10/1/2012
	ODOC Application	ODOC Test Org	EDIF-2012-ODOC Test-00034	Application In Process	12/8/2011	10/1/2012
	ODOC Application	ODOC Test Org	EDIF-2012-ODOC Test-00035	Application In Process	12/12/2011	10/1/2012
	ODOC Application	ODOC Test Org	EDIF-2012-ODOC Test-00036	Application In Process	12/12/2011	10/1/2012
	ODOC Application	ODOC Test Org	CDBG-2012-ODOC Test-00002	Application In Process	12/15/2011	12/2/2012

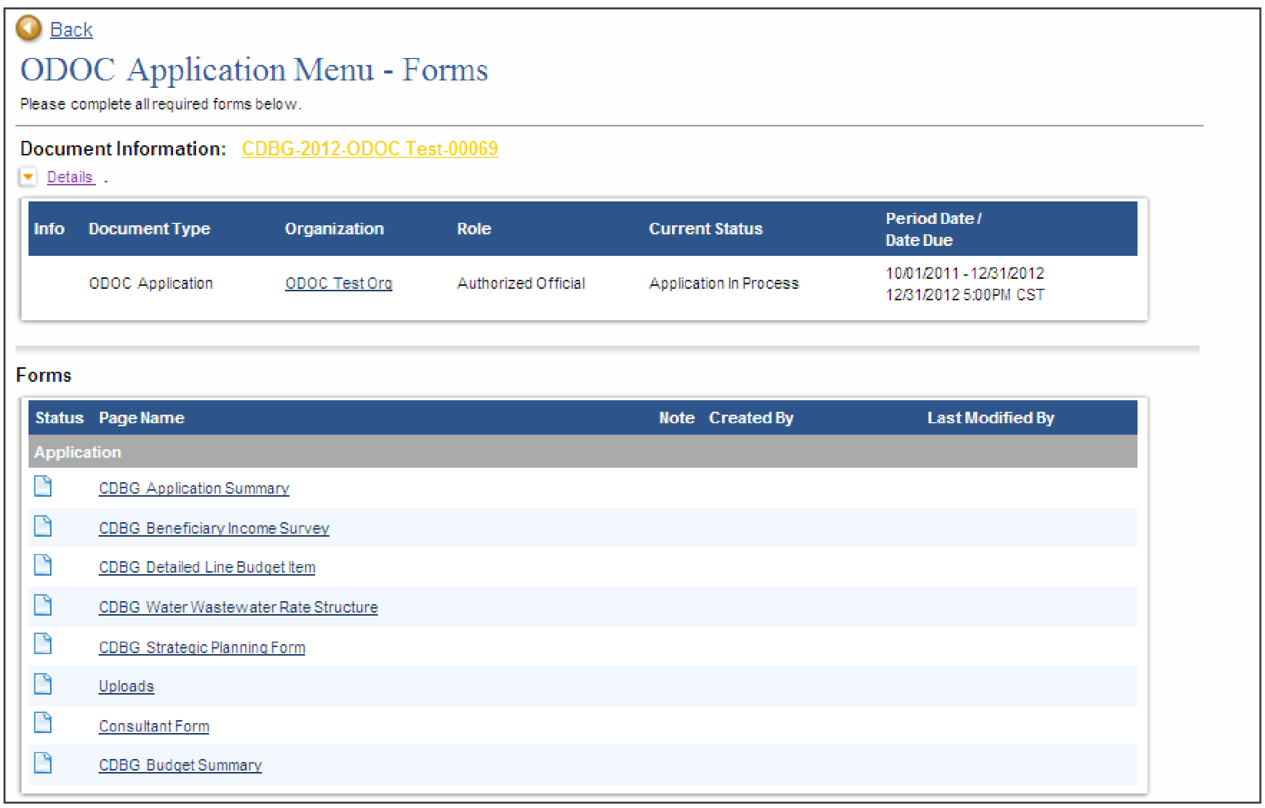
CLOSE MY TASKS

7. The Document Menu

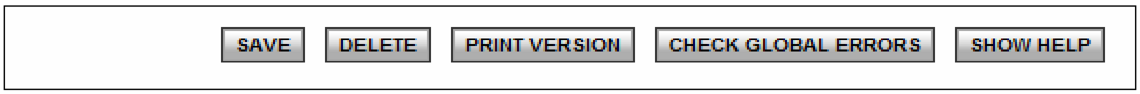
The Document Menu is arranged into various sections that help to organize the document's tasks and information. This menu isn't available until you initiate an intent, then this will be used to navigate through the Intent, Application, and all other documents completed within OKGrants. This manual demonstrates the Document Menu for an application.

7.a. View, Edit and Complete Forms

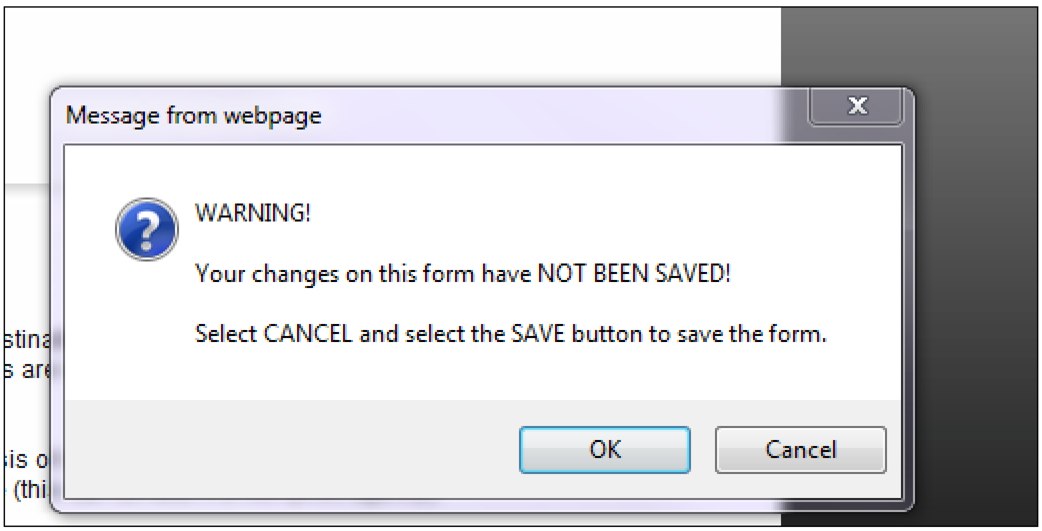
The "View, Edit and Complete Forms" section is where the vast majority of the work in an application is completed. This section contains all of the forms that are necessary to complete prior to the application being submitted. To edit application forms click the "View Forms" button and then click on the name of the form to complete or edit.



Follow the instructions on each form page to complete it. Click "Save" periodically to save any information entered. Many pages have a "Show Help" button, select it for more information about the page.

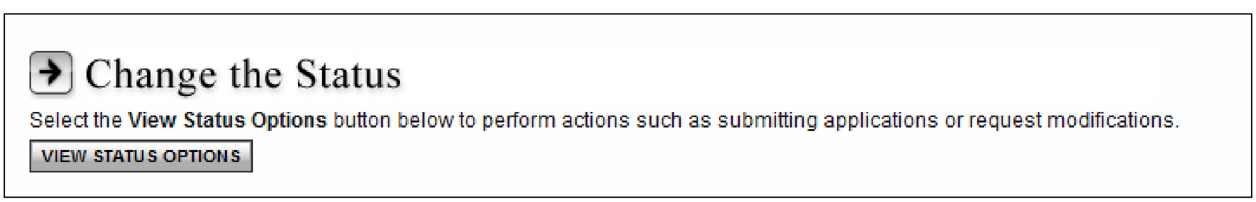


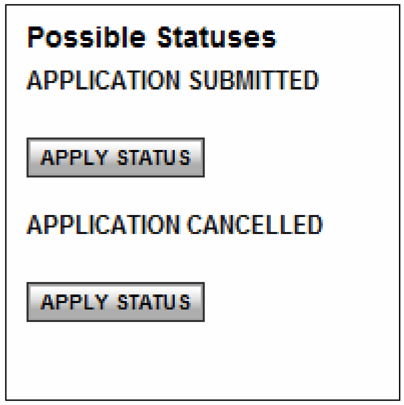
OKGrants also has a "Page Save Warning" feature, if any field in a form is changed, a pop-up box will appear if you attempt to leave the page without saving. Click "OK" to leave the page without saving, click "Cancel" to return to the form and save changes.



7.b. Change the Status

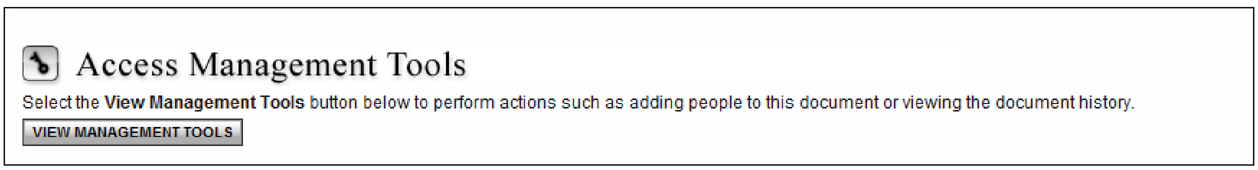
The "Change the Status" section allows an Authorized Official the ability to submit applications (or push the application to the next status level.) Click the "View Status Options" button to see what status push options are currently available. If this menu is blank, then the current role doesn't have permission to move the application out of its current status.

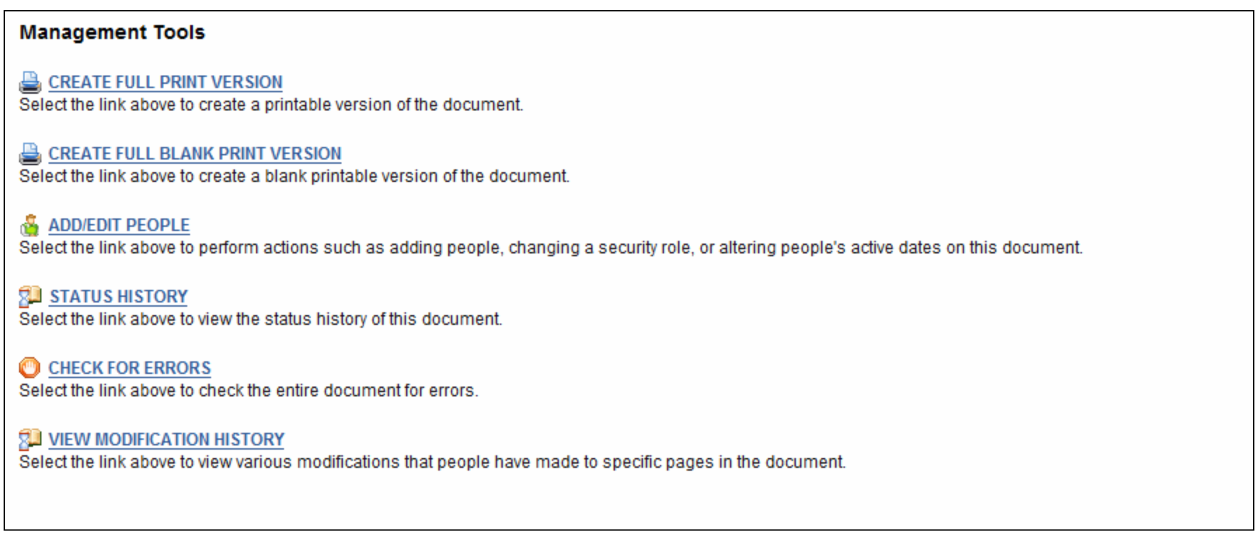




7.c. Access Management Tools

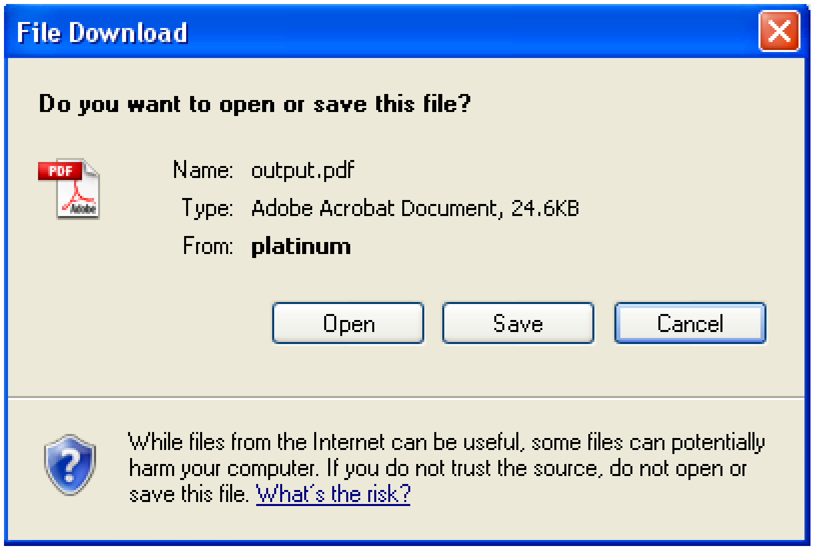
The Management Tools section allows an Agency Administrator, Authorized Official or other authorized staff certain administrative responsibilities such as the ability to add/edit people from the application and view the status history of the application.





CREATE FULL PRINT VERSION will display the entire document, with the fields filled in from the Form pages that are completed.

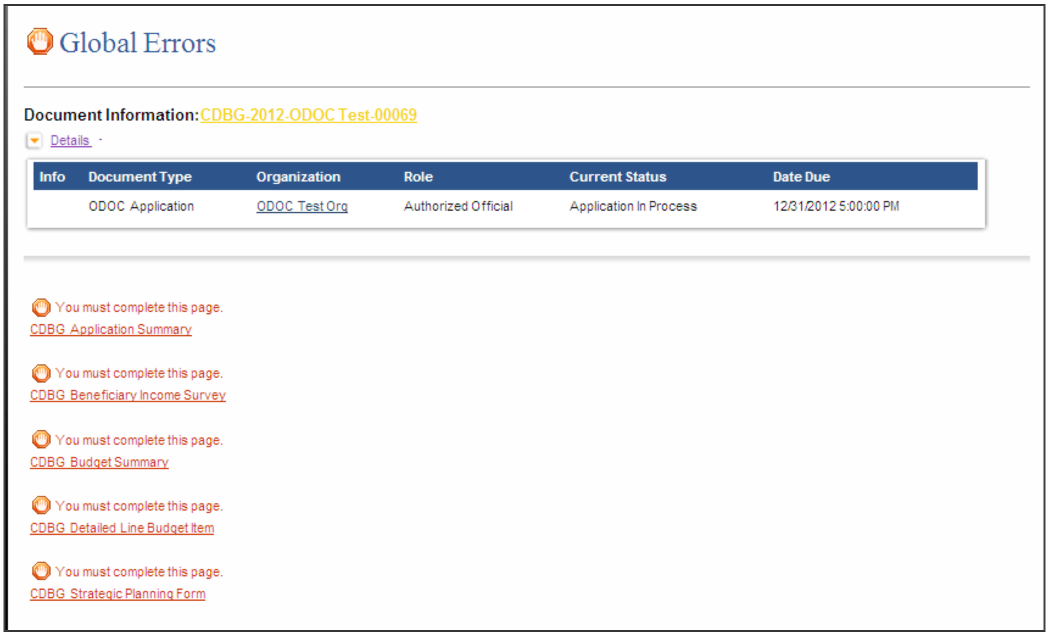
CREATE FULL BLANK PRINT VERSION will display the entire document, with blanks where data is filled in on Form pages.



See Section 7 below for a detailed description of the ADD/EDIT PEOPLE option.

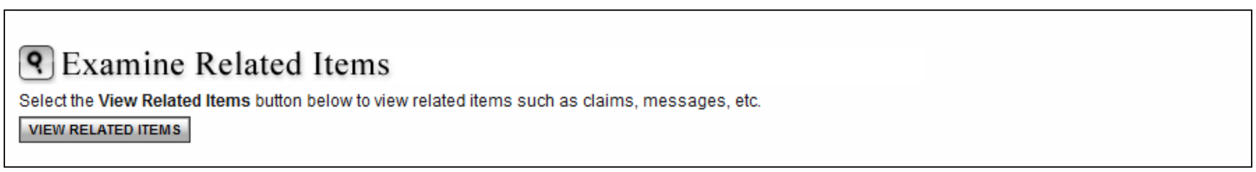
STATUS HISTORY provides a list of the statuses that a document has passed through.

CHECK FOR ERRORS provides a list of the fields and pages that need to be completed before the document can be moved to the next status. This can also be accessed from any form by clicking the "Global Errors" button.



7.d. Examine Related Items

The Examine Related Items section is where you will find items that are related to an application or grant, such as a Progress Report or a Reimbursement Report.



8. Assigning Users to an Application

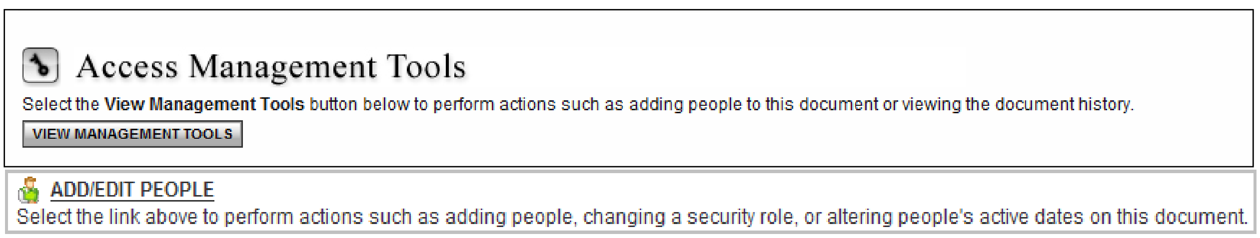
The Agency Administrator and the Authorized Official have administrative rights to add or remove a Financial Officer, Writer or Viewer to and from applications. Users with the Financial Officer, Writer and Viewer roles can be given access to the forms in the application.

When the Authorized Official creates an application, all users who are a member of the organization applying for a grant will automatically be added to that application.

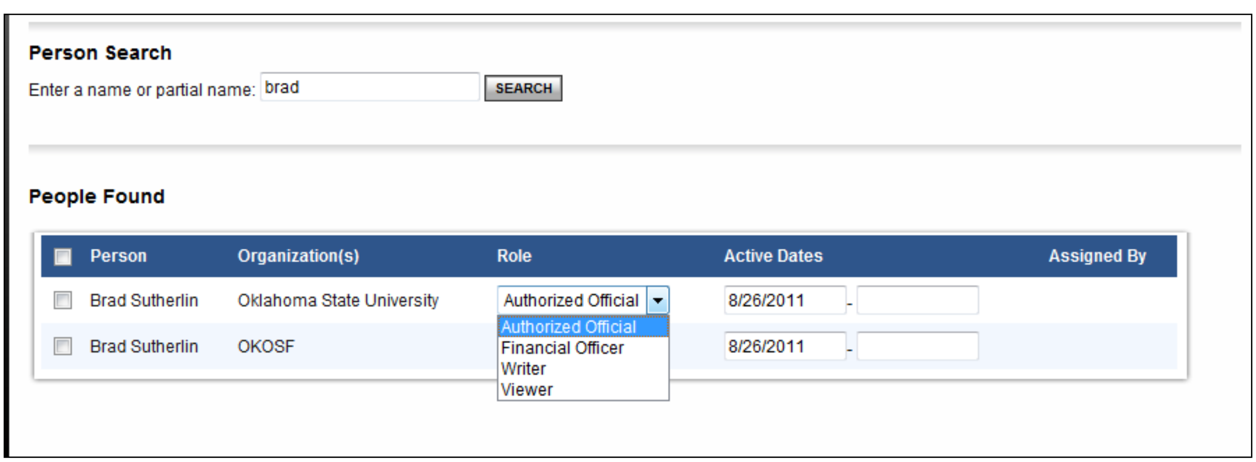
New users to OKGrants will not be automatically added to existing applications. However, any user may be manually added to the application throughout the entire application completion process.

8.a. Assign User Access to an Application

1. To add a Financial Officer, Writer or Viewer to an application, the Agency Administrator or Authorized Official should navigate to the appropriate application, either through "My Tasks" on the home page or by using the "My Applications" tab at the top of the page.
2. Click the "View Management Tools" button and choose the "Add/Edit People" link.



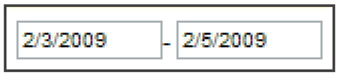
3. Type in the name of the individual in the search criteria box and click the "Search" button.
4. From the search results, select the person, give him/her a security role and fill in the Active Dates for the dates you would like them to be able to access the application. Leave the 2nd box blank for open-ended access.
5. Click the "Save" button to add the selected person to the application.



8.b. Remove User Access to an Application

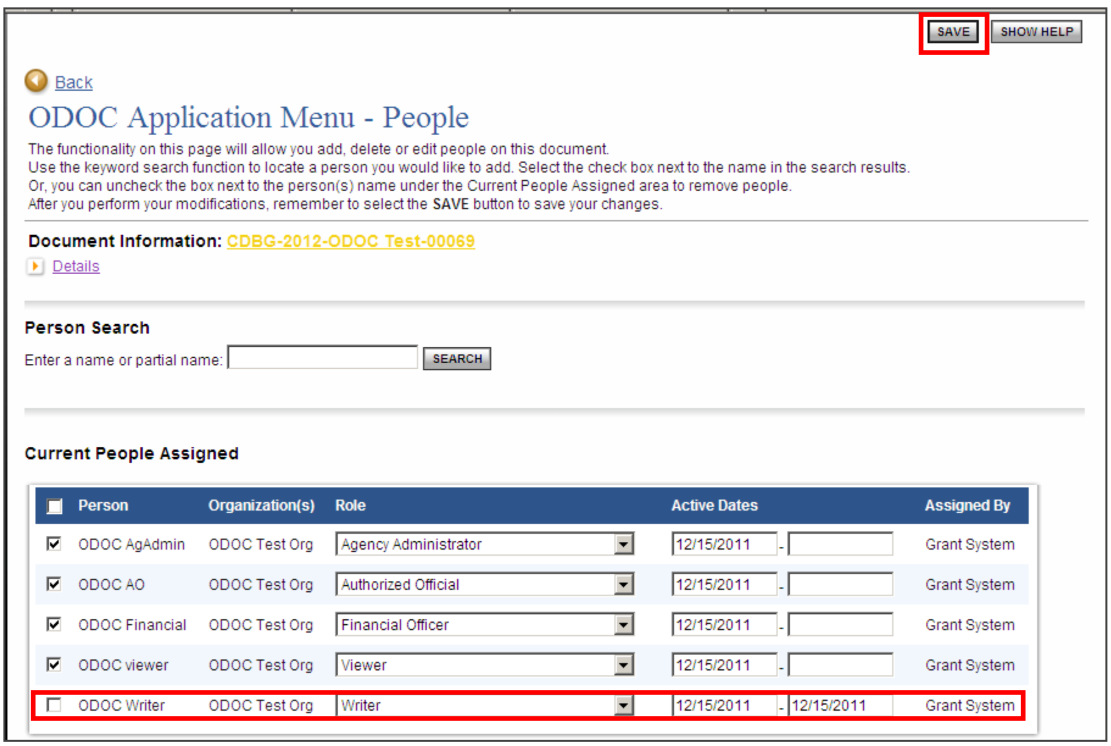
There are two ways to remove a user's access to an application. To begin, on the application menu click the "View Management Tools" button and then choose the "Add/Edit People" link.

1. Edit the active start and/or end date for the user. That user will not be able to access the system before the specified start date or after the specified end date.



Or

2. To remove a user, disable (uncheck) that user and click "Save".



9. Application

The application can either be accessed by going to the “My Home” tab and clicking “Open My Tasks” or by going to the “My Applications” tab and clicking the “Search” button. Click the Project Number to navigate to the application menu.

1. Go to the project’s Application Menu, either from “My Applications” or “Open My Tasks”.
2. Select the “View Forms” button.
3. The rest of the forms in the application will need to be completed. You can check if the application is ready to submit from any form by selecting the “Check Global Errors” button.
4. In order to submit the application, the Authorized Official for your organization will need to log in and select “View Status Options” and select “Apply Status” under Application Submitted to submit the application.