



Oklahoma Department of Commerce

Subgrantee Manual

OKGrants

Version 1

Contents

- 1. System Requirements 3
 - 1.a. Operating System..... 3
 - 1.b. World Wide Web Connection 3
 - 1.c. Web Browser..... 3
 - 1.d. Adobe Acrobat Reader 3
- 2. OKGrants Homepage 4
 - 2.a. Browser Configuration 4
 - Internet Explorer..... 4
- 3. Applicant User Types 6
- 4. User Access in OKGrants (Agency Administrators Only) 8
 - 4.a. Gaining access as an Agency Administrator..... 8
 - 4.b. Granting access to all other users..... 9
 - 4.c. Deactivating a user in the Organization..... 11
- 5. Keeping Contact Information Current 13
 - 5.a. Updating “My Profile” 13
 - 5.b. Updating “My Organization(s)” (Agency Administrators Only) 13
- 6. Home Page 15
 - 6.a. Searching for Documents..... 16
 - 6.b. Accessing My Inbox (E-mail/Messages) 17
 - 6.b.1 Viewing E-mail/Messages 18
 - 6.b.2 Searching for E-mail/Messages..... 18
 - 6.c. Completing My Tasks (Active Tasks) 19
- 7. The Document Menu 20
 - 7.a. View, Edit and Complete Forms..... 20
 - 7.b. Change the Status 21
 - 7.c. Access Management Tools..... 22
 - 7.d. Examine Related Items 24
- 8. Assigning Users to an Application..... 25
 - 8.a. Assign User Access to an Application..... 25
 - 8.b. Remove User Access to an Application..... 26
- 9. Application 27

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.

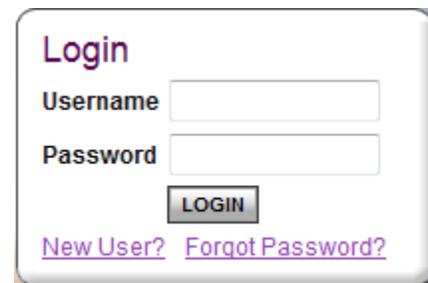
As Agency Administrator for the organization, you must first obtain access by following the procedure under section 4.a. Once you have obtained access to OKGrants, you can manually add additional organization members as described in section 4.b. Both processes for gaining access are described below.

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:

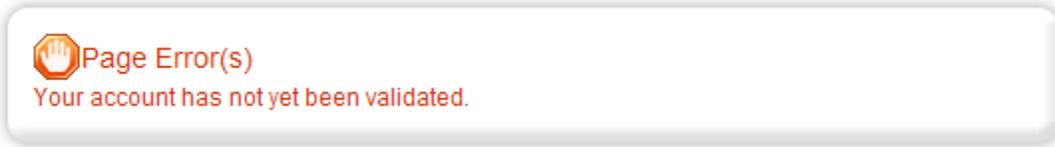
1. From the OKGrants homepage click the "New User?" link located in the "Login" section.
2. Complete the user form in its entirety.
 - a. Fill in all information as required. All items marked with an '*' are required to create your account.
 - b. The "Username" field must consist of all letters and numbers.
 - 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.



The image shows a screenshot of a web form titled "Login". It features two text input fields labeled "Username" and "Password". Below the "Password" field is a button labeled "LOGIN". At the bottom of the form, there are two links: "New User?" and "Forgot Password?".

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."

A screenshot of a web application interface. At the top left is a "Back" link with a circular arrow icon. The main heading is "Organization - ODOC Test Org". Below it is a sub-heading: "Follow the instructions listed below to add/remove/modify organization members." There are three navigation tabs: "Organization Information", "Organization Members" (highlighted with a red box), and "Organization Details". The "Organization Members" section has a sub-heading and instructions: "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." Below the instructions are two links: "Current Members" and "Add Members" (highlighted with a red box). A table follows with columns: Person, Role, Active Dates, Assigned By, and Modified By. The table contains five rows of member data.

<input type="checkbox"/>	Person	Role	Active Dates	Assigned By	Modified By
<input checked="" type="checkbox"/>	AqAdmin, ODOC	Agency Administrator	10/4/2011 - <input type="text"/>	OSF, Admin 10/4/2011	OSF, Admin 10/6/2011
<input checked="" type="checkbox"/>	AO, ODOC	Authorized Official	10/4/2011 - <input type="text"/>	OSF, Admin 10/4/2011	AgAdmin, ODOC 10/4/2011
<input checked="" type="checkbox"/>	Financial, ODOC	<input type="text" value="Financial Officer"/>	10/6/2011 - <input type="text"/>	OSF, Admin 10/6/2011	OSF, Admin 10/6/2011
<input checked="" type="checkbox"/>	viewer, ODOC	<input type="text" value="Viewer"/>	10/4/2011 - <input type="text"/>	OSF, Admin 10/4/2011	OSF, Admin 10/4/2011
<input checked="" type="checkbox"/>	Writer, ODOC	<input type="text" value="Writer"/>	10/4/2011 - <input type="text"/>	OSF, Admin 10/4/2011	

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.

Person Search

<input type="checkbox"/> Person	Role	Active Dates	Assigned By	Modified By
<input type="checkbox"/> Accounting Staff, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		
<input type="checkbox"/> AqAdmin, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		
<input checked="" type="checkbox"/> AO, ODOC		12/15/2011 - <input type="text"/>		
<input type="checkbox"/> Audit Manager, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		
<input type="checkbox"/> Budget Liaison, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		
<input type="checkbox"/> ContractSpecialist, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		
<input type="checkbox"/> Director of Programs, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		
<input type="checkbox"/> Division Director, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		

- 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.

Person Search

<input type="checkbox"/> Person	Role	Active Dates	Assigned By	Modified By
<input checked="" type="checkbox"/> Accounting Staff, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		
<input type="checkbox"/> AqAdmin, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		
<input checked="" type="checkbox"/> AO, ODOC		12/15/2011 - <input type="text"/>		
<input type="checkbox"/> Audit Manager, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		
<input type="checkbox"/> Budget Liaison, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		
<input type="checkbox"/> ContractSpecialist, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		
<input type="checkbox"/> Director of Programs, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		
<input type="checkbox"/> Division Director, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		
<input type="checkbox"/> Financial Liaison, ODOC	Financial Officer	12/15/2011 - <input type="text"/>		

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

[Back](#)

Organization - ODOC Test Org

Follow the instructions listed below to add/remove/modify organization members.

[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 Search

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

[Back](#)

Organization - ODOC Test Org

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Add/Edit Members

Administrators with the authority to add members to your organization can follow these steps:
 Please complete the information below. All required fields are marked with an *.

	Prefix	First	Middle	Last	Suffix
Name	<input type="text"/>	<input type="text" value="Test"/>	<input type="text"/>	<input type="text" value="ODOC"/>	<input type="text"/>
Title	<input type="text"/>				
Email	<input type="text" value="test@test.gov"/>				
Username	<input type="text" value="tester123"/>				
Password	<input type="password"/>		Confirm Password	<input type="password"/>	
Date Active	<input type="text" value="12/15/2011"/>		Date Inactive	<input type="text"/>	
Role	<input type="text" value="Authorized Official"/>				

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"

Organization ODOC Test Org
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](#)

<input type="checkbox"/>	Person	Role	Active Dates		Assigned By	Modified By
<input checked="" type="checkbox"/>	AgAdmin_ODOC	Agency Administrator	10/4/2011	12/15/2011	OSF, Admin 10/4/2011	OSF, Admin 10/6/2011
<input checked="" type="checkbox"/>	AO_ODOC	Authorized Official	10/4/2011	-	OSF, Admin 10/4/2011	AgAdmin, ODOC 10/4/2011
<input checked="" type="checkbox"/>	Financial_ODOC	Financial Officer	10/6/2011	-	OSF, Admin 10/6/2011	OSF, Admin 10/6/2011
<input checked="" type="checkbox"/>	viewer_ODOC	Viewer	10/4/2011	-	OSF, Admin 10/4/2011	OSF, Admin 10/4/2011
<input checked="" type="checkbox"/>	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:

My Profile

Please complete all the required fields below. Required fields are marked with an *.

Contact Information

Name	Prefix	First	Middle	Last	Suffix
	Contract	*		Official	*
Organization	OSU *				
Title					
Address	2214 University *				
City	Oklahoma City *	State	Oklahoma	Zipcode	78378 *
County	Beckham County				
Phone #1	(999) 555-2132 *	Phone #2			
Fax		Cell Phone			
Email	kdykstra@agatesoftware.com *				
Website					
Username	COfficial *				
Password	*	Confirm Password	*		

Organization Information

Organization	Role	Active Dates	Assigned By
Oklahoma State University	Agency Administrator	08/01/2011 - open ended	OCAST, Admin

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.

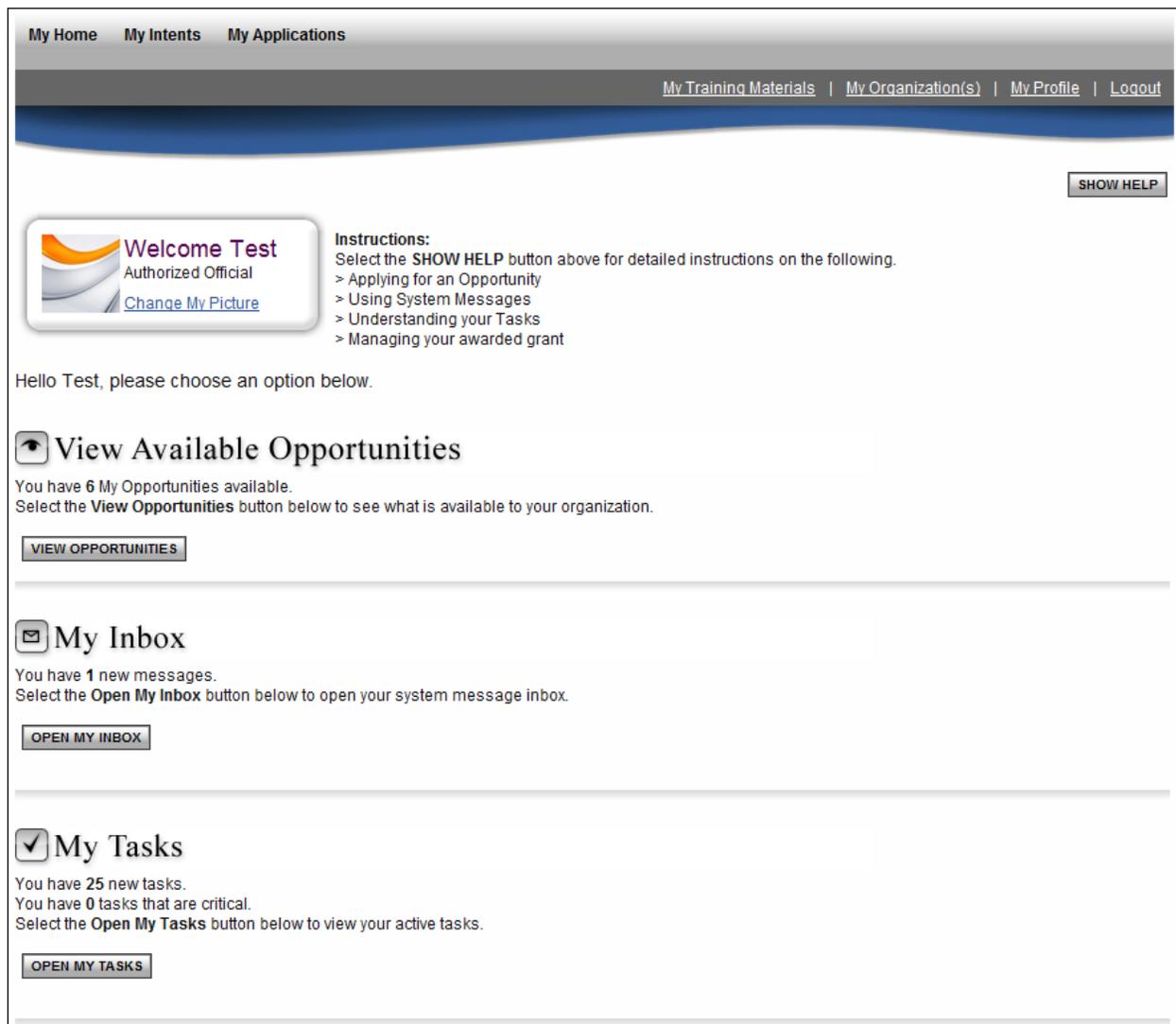
6. Home Page

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.



The screenshot shows the OKGrants Home Page. At the top, there are navigation tabs: "My Home", "My Intents", and "My Applications". Below these are links for "My Training Materials", "My Organization(s)", "My Profile", and "Logout". A "SHOW HELP" button is located in the top right corner. The main content area features a "Welcome Test" message for an "Authorized Official" with a "Change My Picture" link. To the right, "Instructions" are provided, including a "SHOW HELP" button and a list of topics: "Applying for an Opportunity", "Using System Messages", "Understanding your Tasks", and "Managing your awarded grant". Below the welcome message, the user is greeted with "Hello Test, please choose an option below." and three main sections: "View Available Opportunities" (6 available), "My Inbox" (1 new message), and "My Tasks" (25 new tasks, 0 critical). Each section includes a button to view or open the respective area.

My Home My Intents My Applications

My Training Materials | My Organization(s) | My Profile | Logout

SHOW HELP

 **Welcome Test**
Authorized Official
[Change My Picture](#)

Instructions:
Select the **SHOW HELP** button above for detailed instructions on the following.
> Applying for an Opportunity
> Using System Messages
> Understanding your Tasks
> Managing your awarded grant

Hello Test, please choose an option below.

 **View Available Opportunities**
You have **6** My Opportunities available.
Select the **View Opportunities** button below to see what is available to your organization.

 **My Inbox**
You have **1** new messages.
Select the **Open My Inbox** button below to open your system message inbox.

My Tasks
You have **25** new tasks.
You have **0** tasks that are critical.
Select the **Open My Tasks** button below to view your active tasks.

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.

My Applications

Use the search functionality below to find a specific Application.

Search Applications

Application Types

Application Name

Person

Status

Organization

Year

Export Results to Sort by:

Number of Results 2

Document Type	Organization	Name	Current Status	Year
ODOC Application	ODOC Test Org	CDBG-2012-ODOC Test-00048	Application Submitted	2012
ODOC Application	ODOC Test Org	CDBG-2012-ODOC Test-00049	Application Submitted	2012

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."

 **My Inbox**

You have **1** new messages.
Select the **Open My Inbox** button below to open your system message 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"

My System Messages

Use the search functionality below to locate an email. Enter a keyword to search the sender, subject or within the body of an email. You may also filter your results before you search by using the sort functionality.

System Email Folders

- [My System Messages](#)
- [My Sent Messages](#)

My System Messages

Keyword search my system messages for: Sort search results by:

Priority	Sender	Subject	Date/Time	Status
	Grant System	You have been added to OKGrants	10/4/2011 11:50:08 AM	Read
	Grant System	You have been added to OKGrants	10/4/2011 10:11:59 AM	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:

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

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.



View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS

[Back](#)

ODOC Application Menu - Forms

Please complete all required forms below.

Document Information: [CDBG-2012-ODOC Test-00069](#)

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	ODOC Application	ODOC Test Org	Authorized Official	Application In Process	10/01/2011 - 12/31/2012 12/31/2012 5:00PM CST

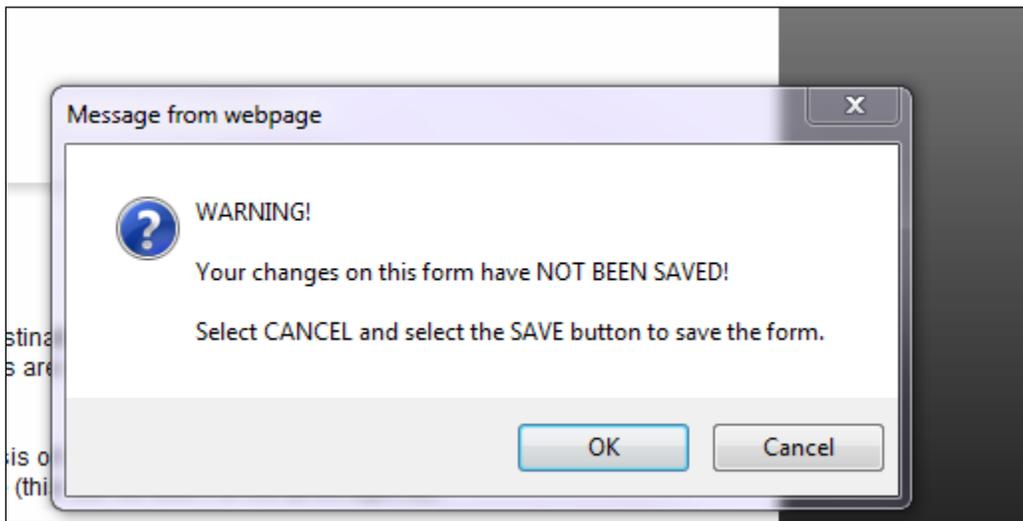
Forms

Status	Page Name	Note	Created By	Last Modified By
Application				
	CDBG Application Summary			
	CDBG Beneficiary Income Survey			
	CDBG Detailed Line Budget Item			
	CDBG Water Wastewater Rate Structure			
	CDBG Strategic Planning Form			
	Uploads			
	Consultant Form			
	CDBG Budget Summary			

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.

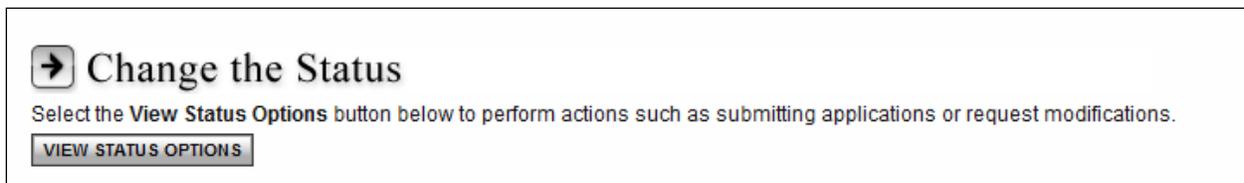


OKGrants also has a “Page Save Warning” feature, if any field in a form is changed, a pop-up box will appear if you attempt to leave the page without saving. Click “OK” to leave the page without saving, click “Cancel” to return to the form and save changes.



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.



Possible Statuses

APPLICATION SUBMITTED

[APPLY STATUS](#)

APPLICATION CANCELLED

[APPLY 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.

 **Access Management Tools**

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

[VIEW MANAGEMENT TOOLS](#)

Management Tools

 [CREATE FULL PRINT VERSION](#)
Select the link above to create a printable version of the document.

 [CREATE FULL BLANK PRINT VERSION](#)
Select the link above to create a blank printable version of the document.

 [ADD/EDIT PEOPLE](#)
Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

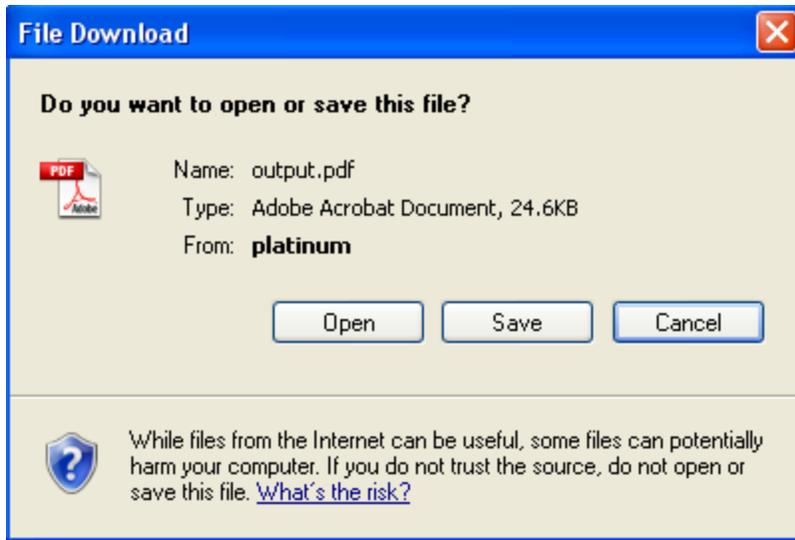
 [STATUS HISTORY](#)
Select the link above to view the status history of this document.

 [CHECK FOR ERRORS](#)
Select the link above to check the entire document for errors.

 [VIEW MODIFICATION HISTORY](#)
Select the link above to view various modifications that people have made to specific pages in the document.

[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.

[Back](#)

ODOC Application Menu - Status History

Below are the details for the status history of this document.

Document Information: [CDBG-2012-ODOC Test-00069](#)

[Details](#)

Document Status History

Status	Date/Time	By	Notes
Application In Process	12/15/2011 9:37:11 AM	AO, ODOC	

[Top of the Page](#)

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.

Global Errors

Document Information: [CDBG-2012-ODOC Test-00069](#)

 Details

Info	Document Type	Organization	Role	Current Status	Date Due
	ODOC Application	ODOC Test Org	Authorized Official	Application In Process	12/31/2012 5:00:00 PM

 You must complete this page.
[CDBG Application Summary](#)

 You must complete this page.
[CDBG Beneficiary Income Survey](#)

 You must complete this page.
[CDBG Budget Summary](#)

 You must complete this page.
[CDBG Detailed Line Budget Item](#)

 You must complete this page.
[CDBG Strategic Planning Form](#)

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.

Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

VIEW RELATED ITEMS

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.

 **Access Management Tools**
Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

[VIEW MANAGEMENT TOOLS](#)

 **ADD/EDIT PEOPLE**
Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

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.

Person Search

Enter a name or partial name:

People Found

<input type="checkbox"/>	Person	Organization(s)	Role	Active Dates	Assigned By
<input type="checkbox"/>	Brad Sutherlin	Oklahoma State University	Authorized Official	8/26/2011 - <input type="text"/>	
<input type="checkbox"/>	Brad Sutherlin	OKOSF	Authorized Official Financial Officer Writer Viewer	8/26/2011 - <input type="text"/>	

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.

2/3/2009	-	2/5/2009
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Or

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

[Back](#)

ODOC Application Menu - People

The functionality on this page will allow you add, delete or edit people on this document.
Use the keyword search function to locate a person you would like to add. Select the check box next to the name in the search results.
Or, you can uncheck the box next to the person(s) name under the Current People Assigned area to remove people.
After you perform your modifications, remember to select the **SAVE** button to save your changes.

Document Information: [CDBG-2012-ODOC Test-00069](#)
[Details](#)

Person Search
Enter a name or partial name:

Current People Assigned

Person	Organization(s)	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/> ODOC AgAdmin	ODOC Test Org	Agency Administrator	12/15/2011 -	Grant System
<input checked="" type="checkbox"/> ODOC AO	ODOC Test Org	Authorized Official	12/15/2011 -	Grant System
<input checked="" type="checkbox"/> ODOC Financial	ODOC Test Org	Financial Officer	12/15/2011 -	Grant System
<input checked="" type="checkbox"/> ODOC viewer	ODOC Test Org	Viewer	12/15/2011 -	Grant System
<input type="checkbox"/> ODOC Writer	ODOC Test Org	Writer	12/15/2011 - 12/15/2011	Grant System

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.