

Oklahoma Department of Commerce

OKGrants Training and Technical Assistance

Frequently Asked Questions and Troubleshooting

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How do I find my username or password?

If an account has been created for you in OKGrants, you should have received an email from OKGrants-Admin@osf.ok.gov with your username and password. Some email clients have spam filters that may interpret this email as junk-mail, so if you have trouble finding the email in your inbox, check your junk folder.

If the email can't be found, your agency administrator has access to see your username and email address. Finally, you can contact your ODOC system administrator.

How do I reset my password?

On the OKGrants home page, there is a link you can use to reset your password, located just underneath the username and password boxes.



This link will direct you to a page that will ask for your username and email address. Once you fill out this page and click the button "Reset my password and email me the new one", the system will send you an email from OKGrants-Admin@osf.ok.gov. This email will contain a temporary password, and you must change your password the next time you log in.

NOTE: Your OKGrants password(s) will automatically expire every 90 days. If you are not in the system on a regular basis you may not see the “Your Password Has Expired” message. If you login and receive the message “Your Account Cannot be Found”, use the instructions in “How do I reset my password” to reset your password at that time.

How do I unlock my account?

If you are locked out of the system due to multiple failed logins (3 attempts), please contact the system administrator.

My application/grant is not in my Taskbox. Where can I find it?

Your application or grant may be in someone else’s taskbox. In order to view it, you can use the “My Applications” link on the OKGrants home page.

 [Back](#)

My Applications

Use the search functionality below to find a specific Application.

Search Applications

Application Types

Application Name

Person

Status

Organization

Year

This search screen will pull from all documents with which you are associated. If you are an Authorized Official or Financial Officer, you should be able to leave all the search fields blank. If you are a grant writer and associated with many different organizations, you may want to use the "Organization" field to narrow down your search results. Use the "Search" button to pull the results. When the search results populate, just click the document number of the grant you wish to view to be taken to its Application page.

How do I submit a request for funds/expenditure report/Request for Release of Funds?

Once you have logged in to OKGrants, you should see a section entitled "My Taskbox". Click to access the taskbox, and you should see a link to your open contracts. In order to initiate a request for funds,

your contract must be in "Executed" status. If it is on "Contract Hold", or any other status, you won't be able to initiate the request for funds.

Find the contract for which you wish to request funds, and click the document number. This should take you to the Application Page. You'll be looking for the button entitled "View Related Items".

ODOC Application Menu

Document Information: WAP-2014-ODOC Test-00002

 [Details](#)

| Info | Document Type | Organization | Role | Current Status | Period Date / Date Due |
|------|------------------|-------------------------------|---------------------------|----------------|--|
| | ODOC Application | ODOC Test Org | ODOC System Administrator | Executed | 10/01/2013 - 12/31/2015 12/31/2015 5:00PM EST |

View, Edit and Complete Forms

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

[VIEW FORMS](#)

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

[VIEW STATUS OPTIONS](#)


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](#)

Examine Related Items

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

[VIEW RELATED ITEMS](#) 

This will pull up a list of all documents related to this application, as well as options to initiate requests for funds, expenditure reports, and Requests for Release of Funds.

Click the link to initiate your advance/expenditure report/Request for Release of Funds. This will take you to the appropriate menu. Now, look for the button entitled "View Forms". You'll need to fill out the appropriate form and save it. If any uploads are necessary, you can use the Uploads form to include them. Once they are filled out completely, click your Document ID (not the Parent Document), to go back to the appropriate menu. You've completed the forms, but they have not been submitted yet. In order to submit them, click the button that says "View Status Options". This should give you an option to change the status to "Submitted". Once submitted, the request for funds/expenditure report/Request for Release of Funds is now in ODOC's taskbox.

I've submitted my Request for Funds. How can I tell when it should be paid?

Once submitted to ODOC, the Request for Funds still has a number of steps to go through before it is paid. This process can take anywhere from eight days to two weeks. To see where your request is in the process, use the "My Financials" link at the top of the OKGrants screen. If you are a writer who works with multiple organizations, include the name of the organization in the "Organization" field. If you know the document number for the request, feel free to include it. Otherwise, just leave all the search boxes blank and you'll see a list of all the financials with which you've been associated.

If the organization is very active in OKGrants, it may return a large list, and it may take a moment or two for the system to aggregate them all. When the search is finished, you'll see a list of all financial documents that match your search terms. Along with the documents, you'll see their Current Statuses.

What does this status mean?

There are many different types of grants and activities, and each has several available statuses. For a breakdown and explanation of each status, please see our Status Glossary on the Resource Page.

What do these Roles mean?

OKGrants users are assigned a role when their account is created. For Grantees, these roles are patterned after levels of signatory authority. Once, this was administered through a separate legal document between the grantee and ODOC entitled "Certificate of Authorized Signatures". Signatory authority is now administered through OKGrants by the Agency Administrator.

****This document pertains to grants through the Oklahoma Department of Commerce. Other agencies may have different systems****

- **Agency Administrator (AA)** – The Agency Administrator’s sole responsibility is to maintain user accounts for their organization. This person must be a paid, regular employee of the grantee (not a contract employee), ideally without involvement in day-to-day grant activities. For ODOC grants, the Agency Administrator role cannot create, save, edit or submit any documents, these activities are performed by the other roles.
 - **Authorized Official (AO)** – The Authorized Official must be someone with the authority to enter into contracts on behalf of their organization. Typically, this is an elected official or an appointee thereof (Mayor, County Commissioner, City Manager). The AO has the ability to create, edit, save and submit applications, requests for payment, expenditure reports, progress reports, and request modifications to the contract or budget – in effect, the AO can do everything necessary to administer a grant through OKGrants.
 - **Financial Officer (FO)** – The Financial Officer should be someone with access to the invoices, purchase orders and financial records pertaining to the grant. The FO has the ability to create, edit, save and submit financial documents (pay requests and expenditure reports), as well as limited abilities to work within applications.
 - **Writer** – The Writer is someone who works closely with the application, but lacks the inherent authority to sign on behalf of the organization. This can be a third-party consultant, member of a Council of Government, etc. The Writer can create, edit and save documents, but lacks the ability to submit them to ODOC. The submission must be performed by the FO or AO.
 - **Viewer** – The Viewer role can view applications and related documents, but is unable to make any changes to them. The Viewer role is typically used by auditors or other interested third parties.
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Our Agency Administrator has changed. How do we update our organization in OKGrants?

For ODOC grants, the Agency Administrator role is uniquely important. This role doesn't work directly with the grants - instead, this role controls the signatory authority for all users in their organization, in order to comply with state and federal regulations and guidelines regarding separation of duties.

In some circumstances, the outgoing Agency Administrator can set up the new AA. This can be done through the "My Organization" link at the top right of the OKGrants home page. See the Subgrantee User Manual, Section 4.B for a walkthrough of this process.

In other circumstances, the outgoing Agency Administrator is not available to set up the new AA. In this case, your ODOC system administrator can help to install a new AA. As the position is a sensitive one,

the Authorized Official should contact the ODOC System Administrator. ODOC's system administrator will need some information to set up the new account.

Our Authorized Official/Financial Officer/Writer has changed. How do we update our organization in OKGrants?

Your Agency Administrator will be able to update and maintain your organization's OKGrants accounts using the "My Organization" link at the top right of the OKGrants home page. See the Subgrantee User Manual, Section 4.B for a walkthrough of this process.

It's important to note that new AO's, FO's and Writers are not automatically associated with your organization's existing applications. If there are open projects that your new user needs to view or work on, they will need to be associated with those projects. A quick call or email to the ODOC System Administrator can get them associated.

Why don't I have a "Save" button?

There can be many reasons that a form doesn't have a "Save Button", but the most frequent ones are detailed below, along with their remedies.

- User has logged in with a role that doesn't feature save capability. - This happens often with users who act as AO/FO as well as AA. The Agency Administrator often doesn't have a save button at all. If you have multiple logins, a quick way to be sure which role you are using is to use the "My Home" link at the top left of the OKGrants page. A section on the Home page will say "Welcome, (Your name)", with the role just underneath the name.
- The document is not in the correct status. - The taskbox system emulates the Inbox on a desk - if the document is not in your inbox, you won't be able to work on it. Check the status on the document - if it doesn't say "In Process" or "Changes Requested", it may have already been submitted to ODOC, taking away the Save button.
- The web connection has timed out. - Sometimes, if the OKGrants window is left open for a period of time without any activity, the secure connection to OKGrants may "time out", releasing the secure internet connection. You might still be able to look at your documents, but

no Save buttons are available. Try logging out and logging back in. This will reestablish the secure connection.

If none of the above methods provide a solution, please email the ODOC OKGrants administrator.

Why don't I have the "Submit" button?

Most often, this is due to the user's role not featuring the Submit capability. When in doubt, the Authorized Official should be able to submit anything. The Financial Officer should be able to submit Financials. The writer is often unable to submit at all. For more information on roles and submit abilities, see the Subgrantee User Manual on our Resource page.

If the role is correct, check the current status on the document. If the document is in a status other than "In Process" or "Changes Required", then it may already be submitted.

It's possible to inadvertently navigate to another spot on the document – for instance, the ODOC Application page and ODOC Advance pages look very similar. Take a moment to be sure the correct document is being submitted.

If none of the above methods provide a solution, please email the ODOC OKGrants administrator.