Tennessee Department of Transportation eGrants

User Manual

This user guide gives a general overview of TDOT eGrants navigation. eGrants is used by Department of Transportation subrecipient(s) to apply for, manage, submit documents, track, and amend grant projects.

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eGrants System Requirements

eGrants is designed for use by the vast majority of computer users with little or no changes to the computer environment. The requirements that are mentioned below are common computer elements that should be present on most machines.

Operating System

eGrants is designed for both of the two more 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 eGrants from a Macintosh environment are required to have MacOS 7.5 or higher. Windows users are required to have an operating system that is Windows XP or higher.

Internet Connection

eGrants is a web site designed for access via the Internet. For purpose of accessing eGrants, minimum connection is by modem. For those using a modem, recommended connection speed is at least 33.6 kbps (kilobits per second). Internet connections "faster" than modem, i.e., cable, DSL, T1, wireless improve speed at which the system operates. In an office environment, there may already be an Internet connection, but if unsure, contact your network administrator.

Web Browser

This system was designed to be compatible with common up-to-date web browsers including Internet Explorer V.11 and above, Firefox, Chrome and Safari.

Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The eGrants system automatically generates grant documents in PDF format using information that is saved into various narrative and budget pages. Using Adobe Acrobat Reader can view, print, or save PDF documents. Adobe Acrobat Reader can be downloaded at www.adobe.com.

Subrecipient User Types

There are three types of subrecipient security roles:

- Agency Official
- Agency Administrator
- Agency Staff

These roles have different security levels needed to access the **My Applications, My Projects**, and **My Invoices** tabs. Once an Agency Administrator is identified and a new user account is created, the Agency Administrator can select and enter the organization's staff member names into eGrants. Staff members, assigned by an Agency Administrator, are given the role of staff. The three security roles are summarized below:

Agency Official

- Views and initiates Applications/Projects & Invoices
- Enters and updates information on Applications, Projects, and Invoices
- Downloads and attaches files to Applications/Projects & Invoices
- Checks status of Applications/Projects

Agency Administrator

- Creates new user accounts
- Adds new users to eGrants and assigns organization staff to Agency Staff or Agency Official security roles
- Edits and/or deletes user account information
- Views, initiates, and submits Applications, Projects, and Invoices
- Enters and updates information on Applications/Projects & Invoices
- Downloads and attaches files to Application/Projects & Invoices
- Checks status of Applications/Projects

Agency Staff

- Enters and updates information on Applications/Projects
- Downloads and attaches files to Application/Projects
- Checks status of Applications/Projects
- Views, initiates and submits Applications/Projects

System Access

There are two ways to access eGrants:

1. Request access to eGrants via the **eGrants Login** page and get approved by a TDOT eGrants system administrator

-OR-

2. When an organization already has an eGrants account, obtain access from the organization's Agency Administrator. This is the preferred way to access eGrants – it is quick and provides greater security for the organization's records.

Agency Administrator Access

To gain access to eGrants as an Agency Administrator, first create a new user account. From the eGrants My Home page select "New User" located in the **Login** section (see Figure 2).

Note: if you are already registered as an eGrants subrecipient, please use that login information to access the system. You do not need two accounts.

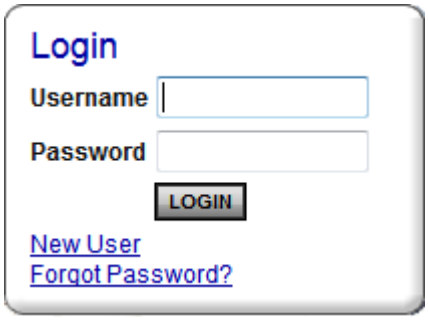


Figure 1: eGrants Login

1. Fill in the **Contact Information** as required. All items marked with an * are required.
    a. The "Username" field can consist of letters and numbers
    b. Your "Password" must contain at least 1 upper case letter, at least 1 number and must be at least 7 characters long
    c. The fields "Password" and "Confirm Password" must match.
    d. Special characters are allowed in the password
2. Click on the ***Save*** button.

After saving the new user information, the account will be validated by a TDOT eGrants system administrator. If attempting to access the system before validation, the following message will appear:

Figure 2: Account Validation Error

When access has been granted, an e-mail confirming the account has been validated will be received. If the account is set up as an Agency Administrator, the user will now be able to create additional user accounts for the organization.

Note: Users are not able to access documents created *prior* to the date they are activated/assigned to an organization. For access to documents dated before a user's activation date, an *Agency Administrator* must assign the user to each individual form/document using the ***Add/Edit People*** option located within each document. On the document's main menu, under the **Access Management Tools** menu click on the ***View Management Tools*** button select the ***Add/Edit People*** link.

Viewer Access

The preferred method for gaining access to eGrants is to have the organization's Agency Administrator add new users to the system.

To add a staff person to an organization:

1. Select the "Organization(s)" link.
2. Select the "Organization Members" link.
3. Select the "Add Members" link.

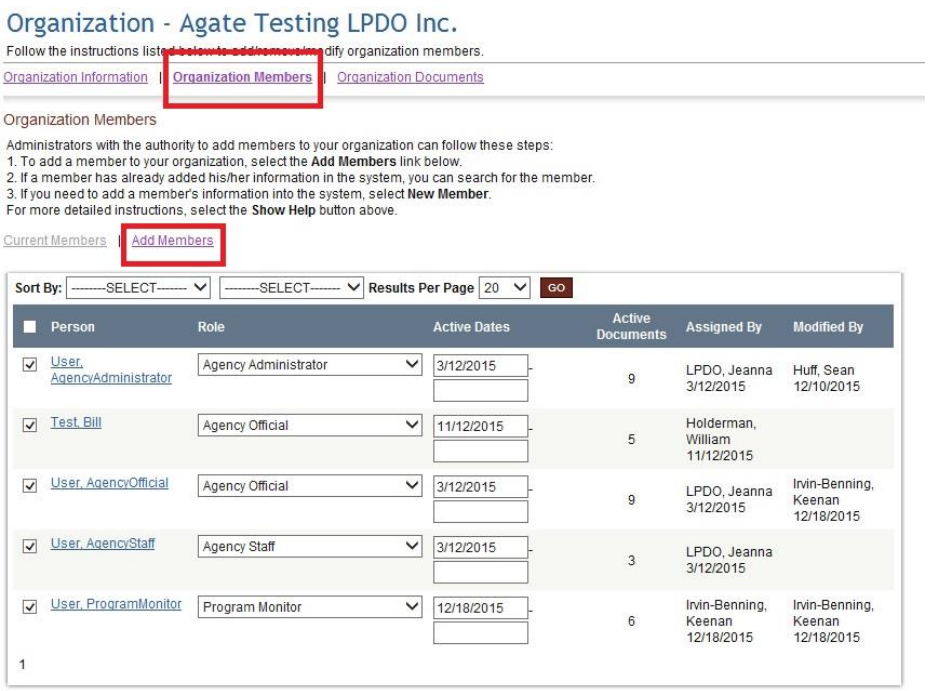


Figure 3: Organization Information

4. A person search field appears. Type the first or last name of the person to add and select "Search." The results appear below.

Figure 4: Member Search Results

5. Place a check in the box next to the person to add. Select a role, enter an active date (beginning), and click on the ***Save*** button. Then select the ***Current Members*** link, and confirm that the person added is shown with the rest of the organization's member names.

Figure 5: User Selection

6. If the person's name does not come up in the search results, then select the ***New Member*** button.

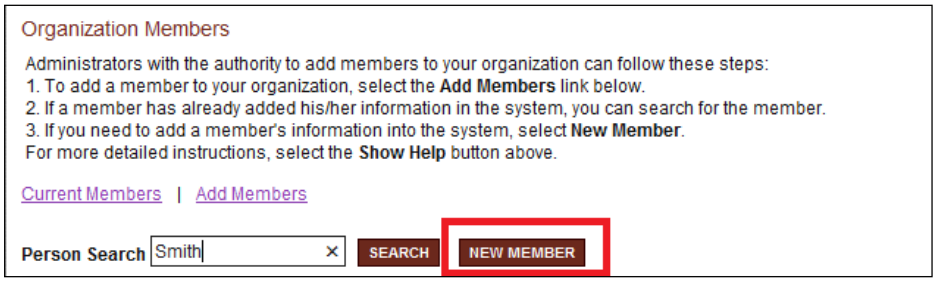


Figure 6: New Member Button

7. Enter information for the new user and lick the ***Save & Add to Organization*** button.

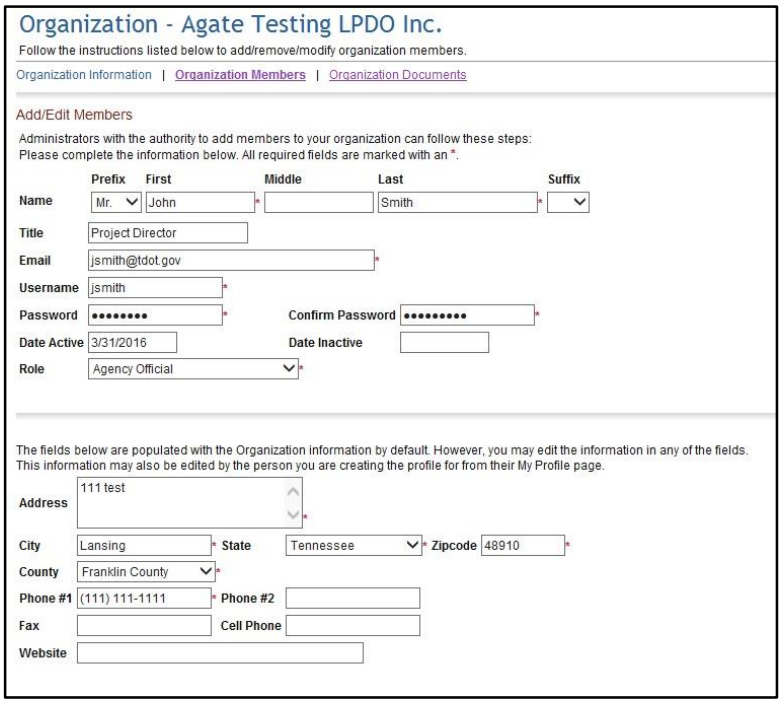


Figure 7: New User Information

Accessing eGrants

To access the eGrants site, enter TDOT.intelligrants.com into the address bar of a web browser. The page looks like the image below.

Note: eGrants does not save the username and password. This option *may* be available on the browser.

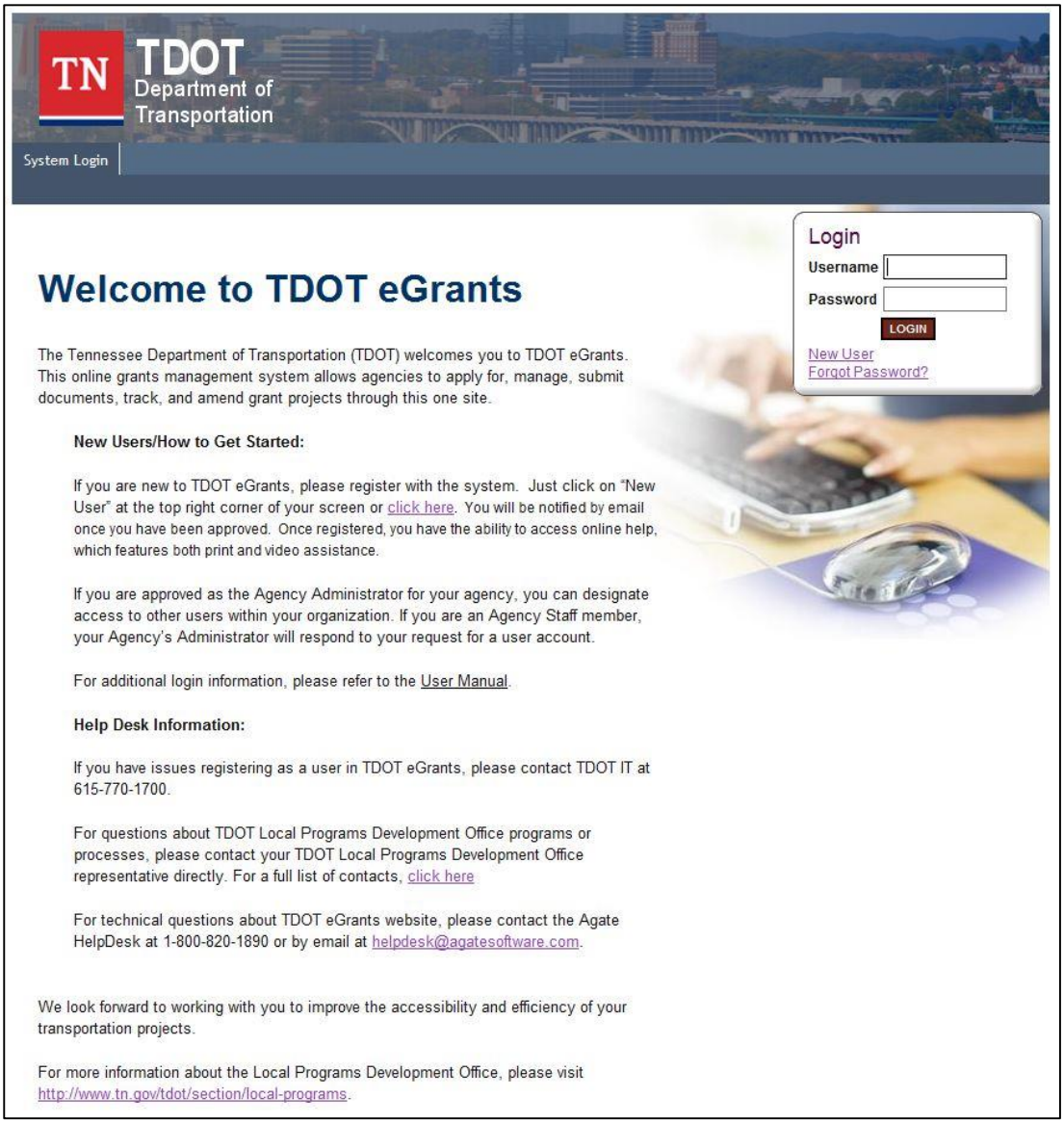


Figure 8: eGrants Login Page

Bookmark/Favorites

eGrants may be bookmarked, or added, to the favorites menu.

After accessing the **eGrants Login** page, on the web browser menu bar:

1. From the toolbars at the top of the page, select the ***Favorites*** menu.
2. Select ***Add to Favorites*** link to bring up the **Add a Favorite** menu.
3. Rename the site, if desired, and click on the ***Add*** button.

Adding eGrants to List of Trusted Sites

To avoid various browser-related restrictions unnecessarily placed on eGrants, make the following changes to the web browser. If using Internet Explorer, we recommend adding the TDOT eGrants My Home page to the list of trusted sites as follows:

1. From the toolbars at the top of the page, select the ***Tools*** menu.
2. Select ***Internet Options***, then select the **Security** tab.
3. Click on the **Trusted sites** icon, and click on the ***Sites*** button.
4. In the **Add this website to the zone:** field, enter: TDOT.intelligrants.com and click on the ***Add*** button.
5. Click on the ***Close*** button and then click ***OK***.

User Contact Information

Updating User Profile

It is important to keep contact information up-to-date. This may be done quickly and easily in eGrants. By keeping records current, TDOT staff members are able to easily contact users when a need arises. This is especially important for timely messaging. When system messages are sent from eGrants, they are sent to the e-mail address in the user profile. **When an incorrect e-mail address is in the contact information, automatic notifications will not be received.** Also, in the event of a forgotten password, the e-mail address is required and must match the one listed in the contact information.

Update the profile at any time by:

1. From the **My Home** page, select the ***My Profile*** link.
2. Update the form with current information and click on the ***SAVE*** button.

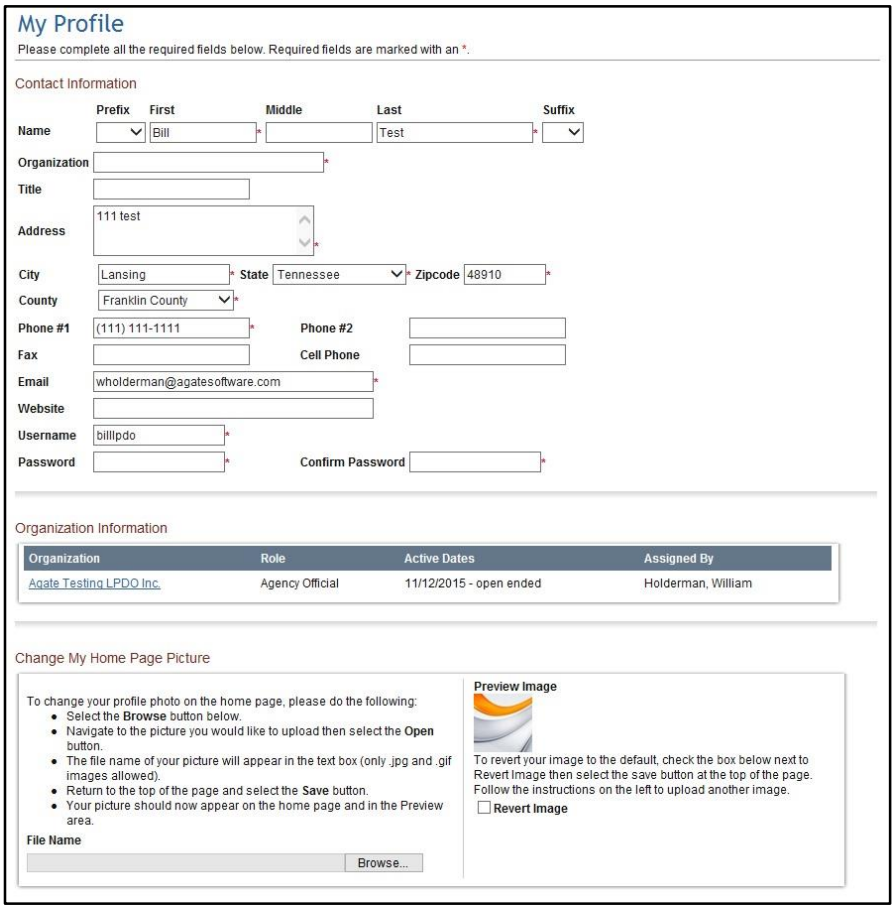


Figure 9: My Profile Page

Updating Another User's Contact Information

An organization's Agency Administrator may edit another user's contact information as follows:

1. Select the ***Organization(s)*** link and then select the organization whose member(s) you wish to edit.

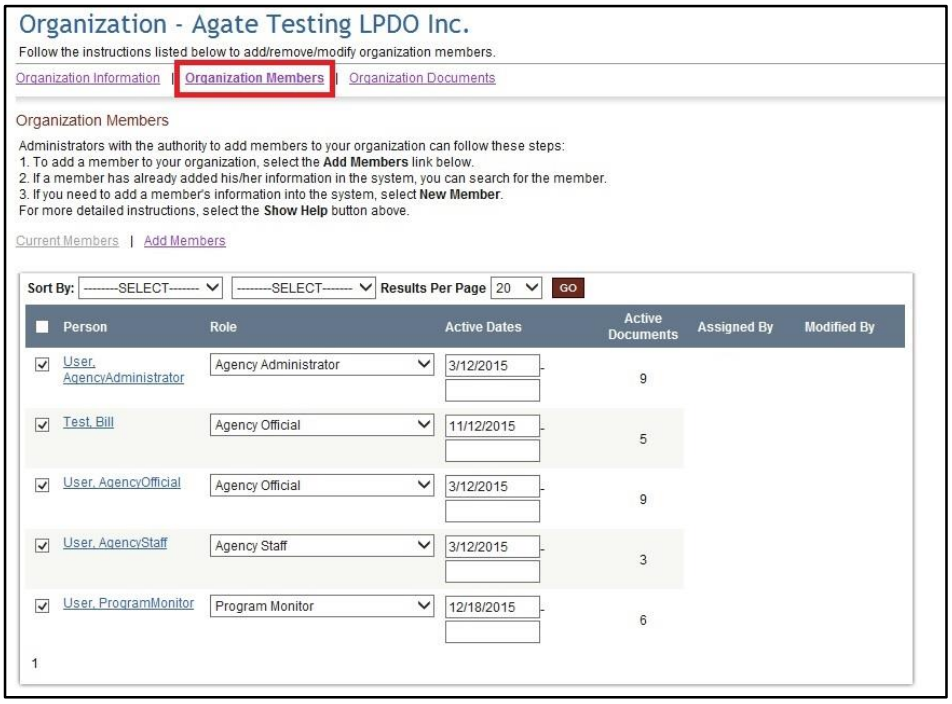


Figure 10: Organization Members

2. Select the ***Organization Members*** link.
3. Next, select the name of the person whose contact information you desire to change.
4. Update the information accordingly and click on the ***Save*** button.

Updating Organization Information

When an organization's contact information changes, it is important to update the system.

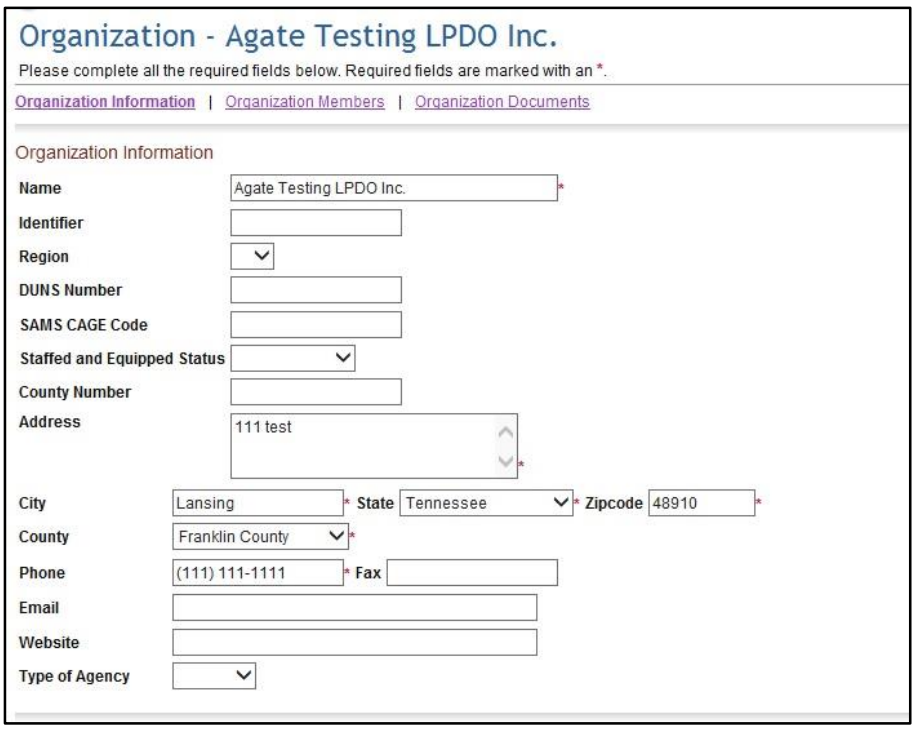


Figure 11: Organization Information

There may be links within the **Organization Information** section that require additional information. If these links exist, select the links and fill out the required information. An example of such a link might be, "Mailing Address."

Deactivating a User

An Agency Administrator can deactivate a member of his/her organization. A deactivated user cannot access or edit proposal-related information. To deactivate a user:

1. If there is more than one organization, then first select the one to edit.
2. Select the ***Organization Members*** link.
3. Using the drop-down calendar, set the second "Active Dates" field to the date on which the user will no longer have access.
4. Then select the ***Save*** button.

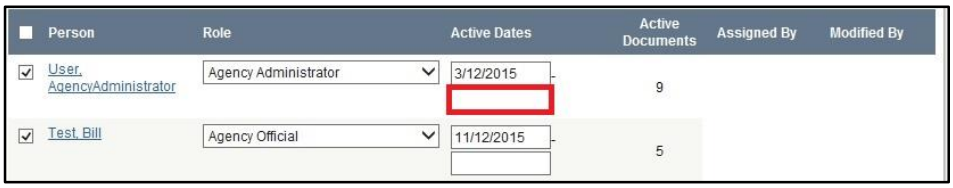


Figure 12: Deactivating a User

My Home Page

The **My Home** page is the next page seen after logging into eGrants grants system. From the **My Home** page all types of documents can be accessed, such as application /grants, contract information, forms, reports, e-mail/messages, user information, system information, etc.

- The eGrants system features a number of tabs across the top of the screen that allow access to the **My Home** page, **My Applications** page, **My Projects** page, and **My Invoices** page. User access to these tabs is dependent on the security settings of that user.
- On the **My Home** page it contains, the **View Available Opportunities** section, the **View My Inbox** section, and the **View My Tasks** section.
- Applications can be started through the **View Available Opportunities** section.
- There may be times when only the ***My Inbox*** (e-mail/messages) appears on the **My Home** page.
- When there are no active tasks to perform, the ***My Tasks*** section does not appear on the **My Home** page.

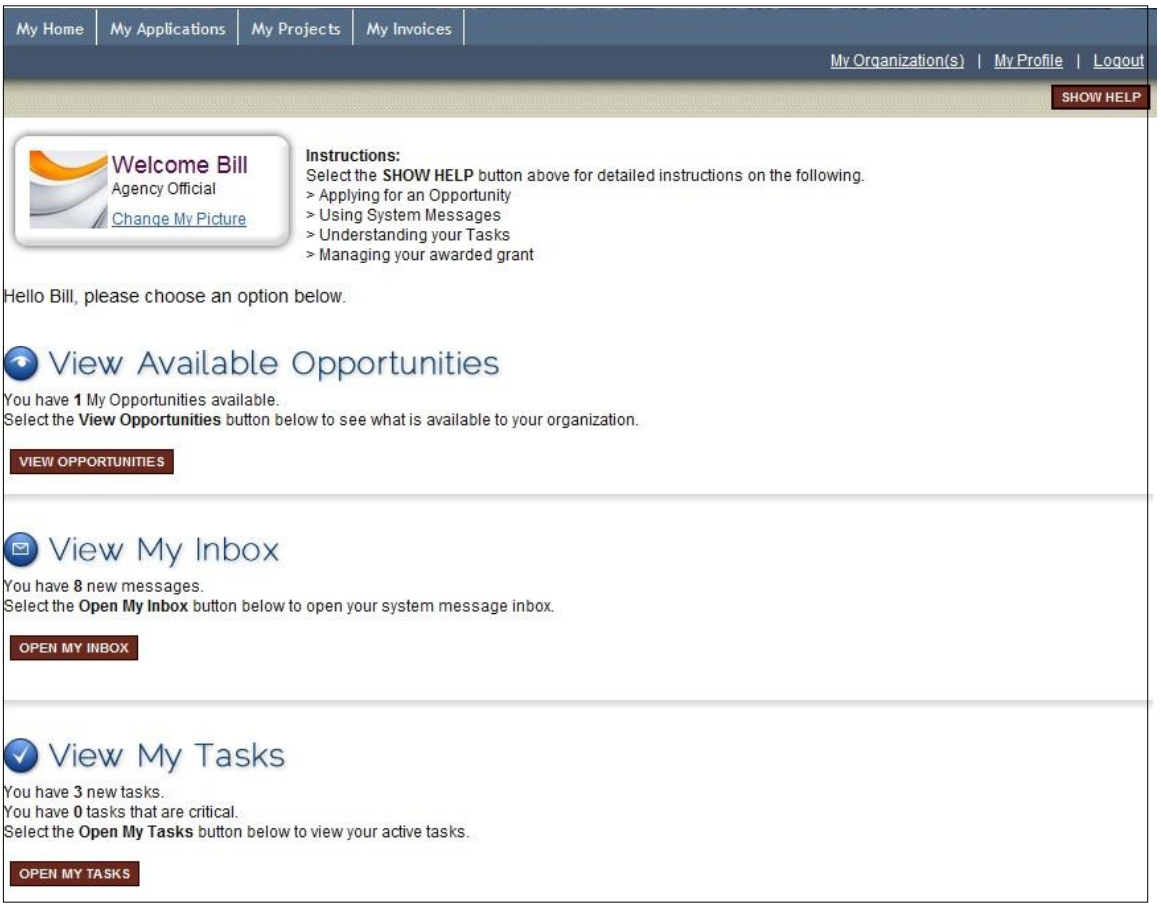


Figure 13: My Home Page

Searching for Documents

The **My Applications**, **My Projects**, and **My Invoices** tabs allow for searching documents in the system. Search fields and functionality are the same for all of the tabs. This example will search for a Application/Grant, but the steps are the same for all document types.

Figure 14: My Home, My Applications, My Projects, and My Invoices Tabs

To view a list of applications:

1. Select the ***My Applications*** tab.
2. Click on the ***Search*** button to generate the search results.

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

1. Select the ***My Applications*** tab.
2. Add any filter criteria by populating specific fields or making specific selections from drop-down menus. Click on the ***Search*** button to generate the search results.

From the list of applications, select the one to view by selecting the name.

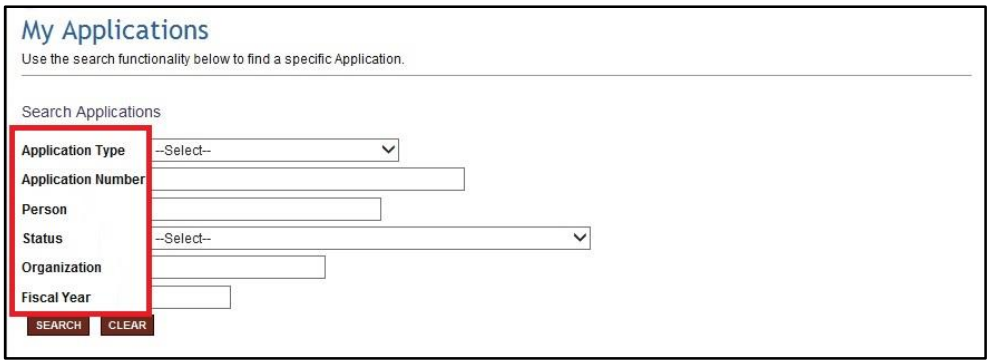


Figure 15: My Application Search Filters

Note: Until users submit Applications a search will result in no records found.

Viewing Opportunities

The ***My Opportunities*** section is only visible to subrecipients and lists available application(s) that subrecipients can apply for and submit to TDOT. To initiate a proposal, select the ***View Opportunities*** link and then click on the ***Start New Project*** button.

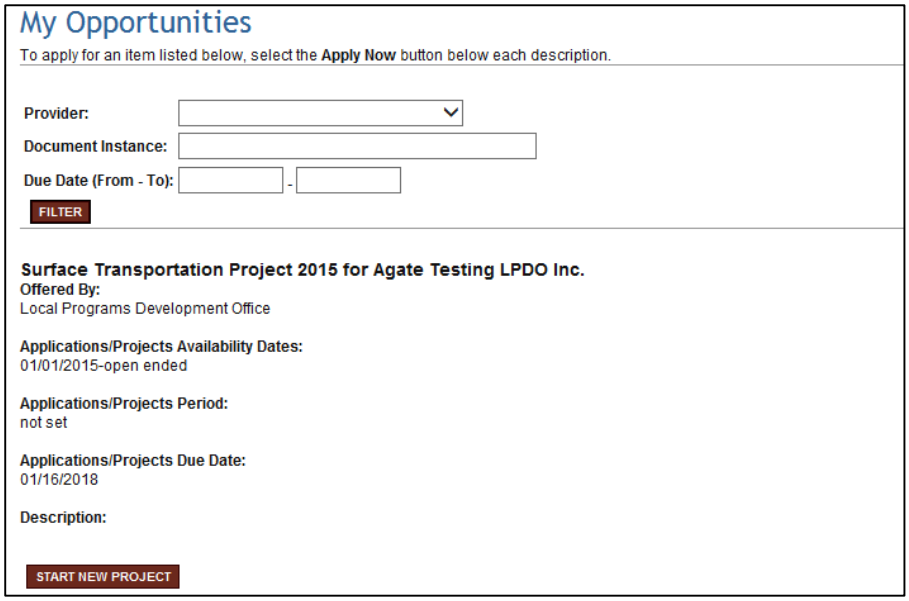


Figure 16: My Opportunities

Accessing My Inbox (E-mail/Messages)

The eGrants system e-mail/messages are sent periodically. E-mail messages appear both in the eGrants in the **My Inbox** section and at the e-mail address listed in the eGrants contacts information.

For example, an e-mail may be sent upon submission of an Application, an Application being denied, or an Application being approved, etc. These messages keep users informed and serve as a reminder when certain tasks require action.

To receive timely messages it is important to maintain an active e-mail address in the eGrants system (See user manual Contact Information section). An incorrect e-mail address (or an e-mail inbox that is full) will prevent users from receiving important TDOT grants-related messages.

The **View My Inbox** section allows access to system e-mail/messages. To see contents, select the ***Open My Inbox*** button.

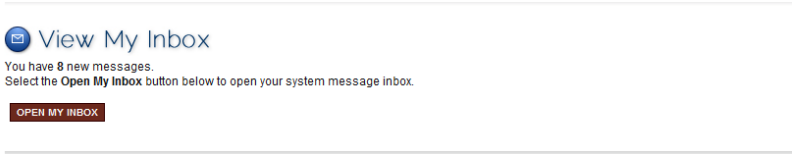


Figure 17: Open My Inbox

Viewing E-mail/Messages

All new messages (unread), if any, are displayed in the **Inbox**:

- Sort messages by *Priority*, *Sender*, *Subject*, or *Date/Time* columns.
- Select the ***View All My System Messages*** link to see all messages going back to when system access was approved.
- View a message's priority status or the date/time message stamp.
- View a specific message by selecting its subject link.
- Select a sender's name to reply to a message.
- Check box at left of message to "Mark Checked as Read".

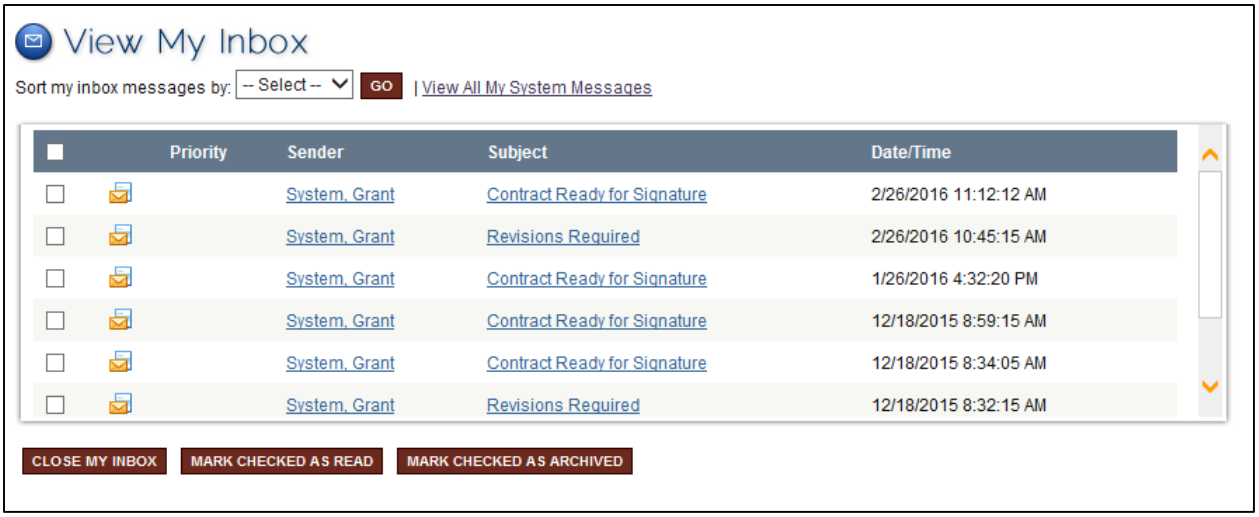


Figure 18: View My Inbox

Searching for E-mail/Messages

To search for a message, select the ***View All My System Messages*** link. From the **System Messages** page, enter a keyword and click on the ***Search*** button. A list of messages that match the search criteria will display.

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 approved and their priority status.
- Select a sender's name to reply to a message.

Completing My Tasks (Active Tasks)

The **View My Tasks** section appears on the **My 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 the ***Open My Tasks*** link and then click on the name of a document to go to that document's menu.
- When there are no active tasks, the ***View My Tasks*** section is not visible on the **My Home** page.

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

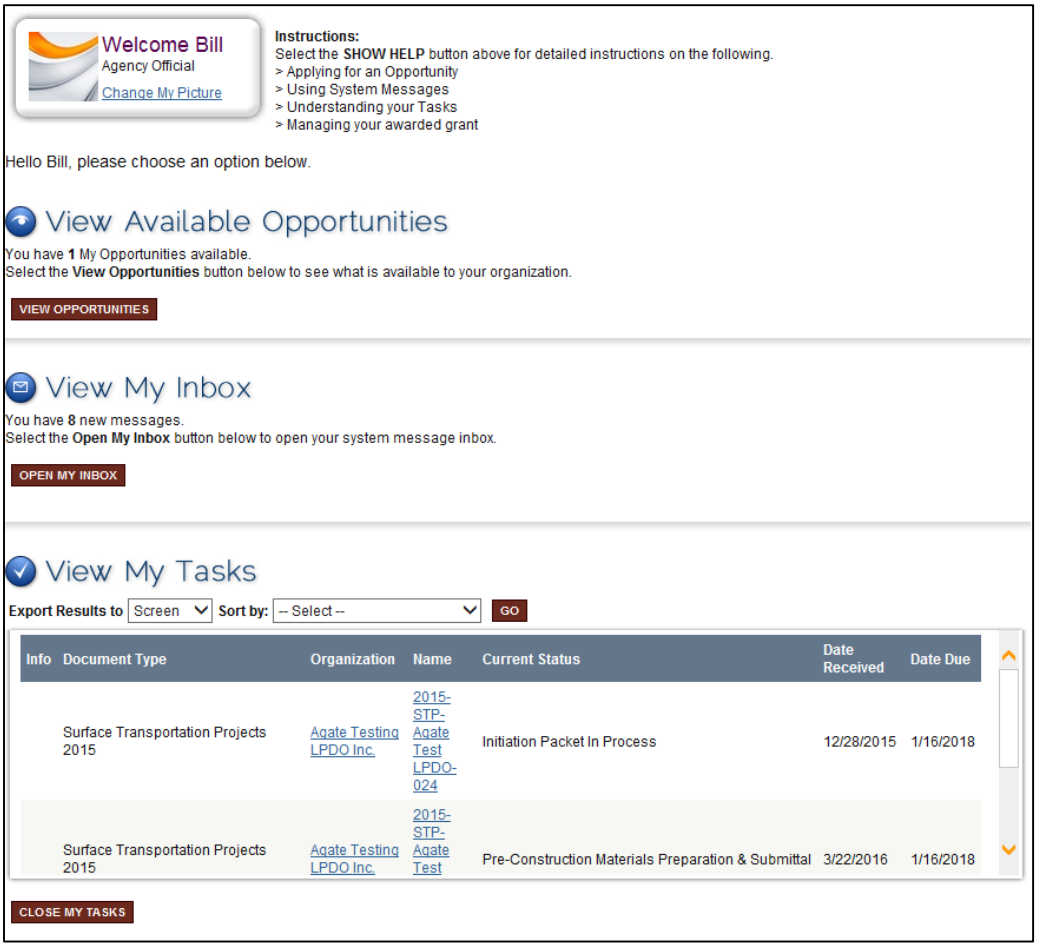


Figure 19: View/Open My Tasks

Application Initiation

During a grant cycle's application period, the ***View Available Opportunities*** section appears on the **My Home** page. When the application period is over, this option is no longer visible.

The subrecipients Agency Official, Agency Staff, and Agency Administrator, are the only roles authorized to initiate an application.

Initiating an Application

To initiate an application:

1. Click on the ***My Home*** button at the top of the page.
2. Click on the ***View Opportunities*** button in the **View Available Opportunities** section.

Figure 10: View Available Opportunities

3. This will bring up a list of "Opportunities" (Applications) to apply for. You can use the **Filter** section to minimize the number of applications to choose from.

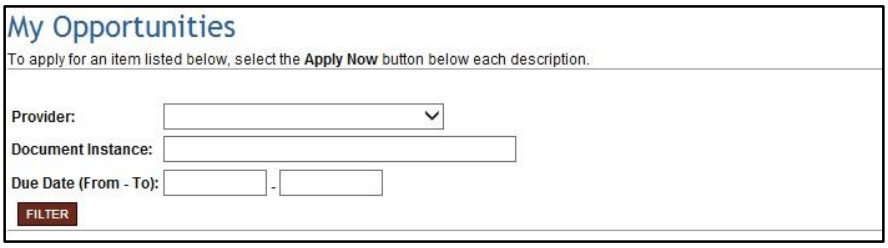


Figure 11: My Opportunities

4. To initiate an application, select the ***Start New Project*** button for a specific application.

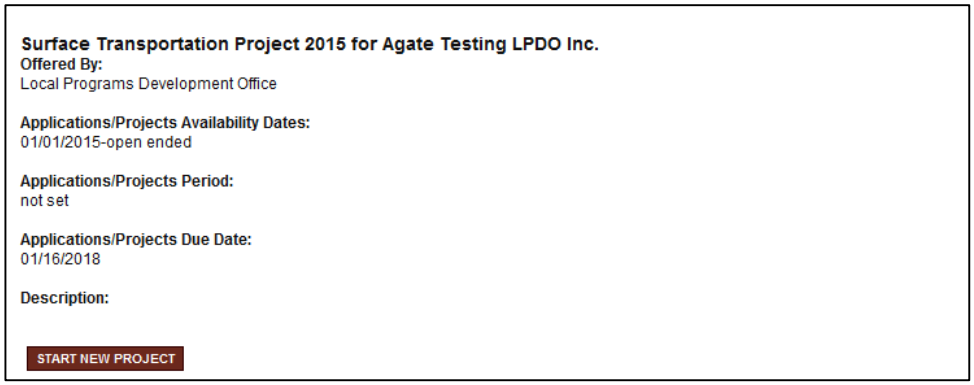


Figure 12: Start New Project

Returning to an In-Progress Application

Following initiation of an application, a new task appears under the **View My Tasks** section on the My Home page.

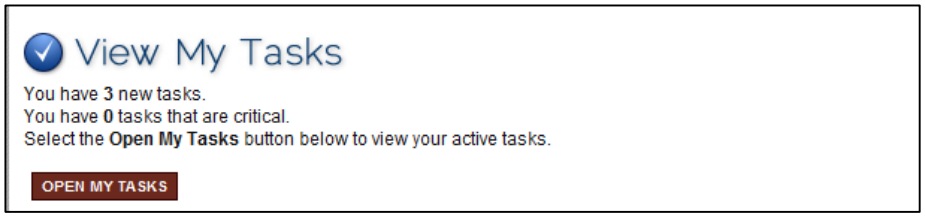


Figure 13: View My Tasks

When logging out of eGrants and returning later to continue working on a proposal:

1. Go to top left of the screen, and select the ***My Home*** button.
2. In the **View My Tasks** section, select the ***Open My Tasks*** button to return to a proposal initiated by the organization.

Searching for an Application

To search for an application/grant, or any other grant document, select the ***My Applications*** tab. See user guide section, 6.a. Searching for Documents.

Figure 14: My Home

My Applications Menu

The ***My Applications*** menu is ordered into four sections to help keep tasks and information organized. The sections are described below.

Viewing, Editing, and Completing Forms

The **View, Edit and Complete Forms** menu is where the vast majority of work is completed within the system. This section contains the forms necessary to complete before submitting a proposal.

1. Click on the **My Applications** tab at the top of the page. This will bring up a search form. You can apply additional filters by adding text and/or selecting drop-down items to reduce the search results. Once those filters are added, click on the ***Search*** button.

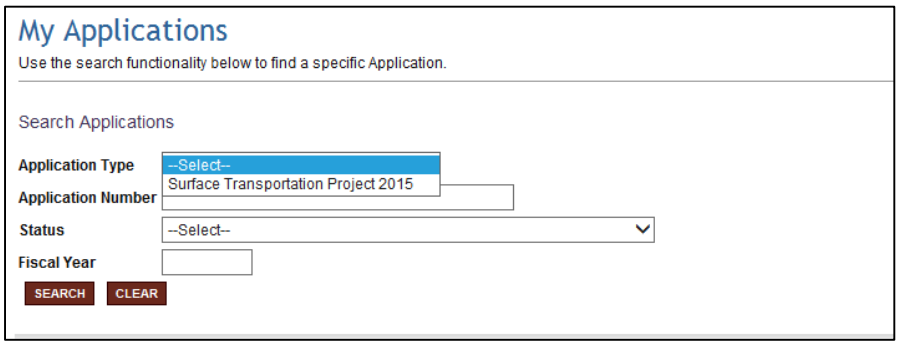


Figure 15: My Applications

3. This will bring up a list of results of active applications. Click on the hyperlink of a specific application listed in the **Name** column.

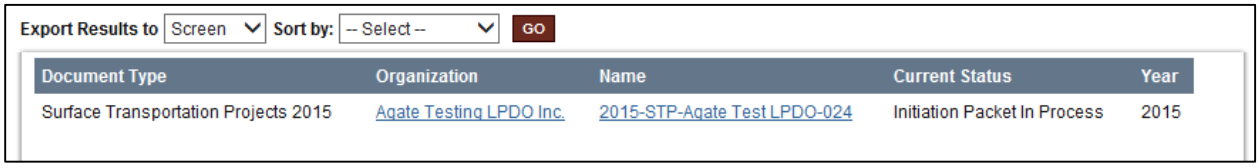


Figure 16: My Applications Search Results

4. This will bring up a list of options available for that specific application (top section shown in the screenshot below).

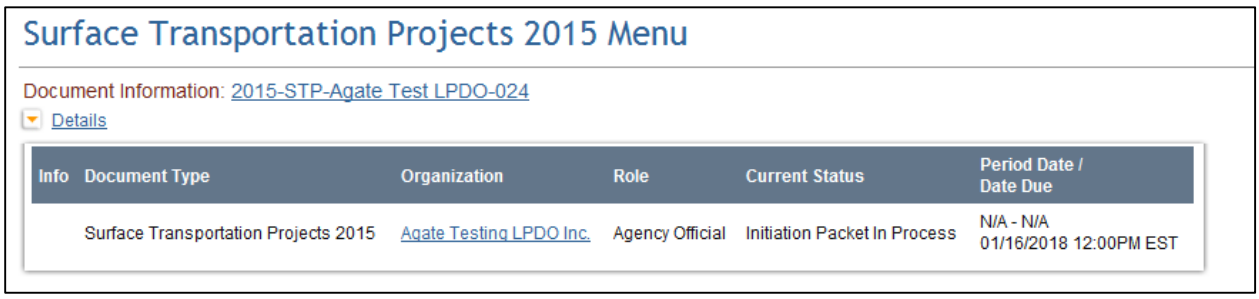


Figure 177: Document Menu

5. To access a form, select the ***View Forms*** button under the **View, Edit and Complete Forms** section.

Figure 188: View, Edit, and Complete Forms

6. Select the name of the form to view, edit, and complete the form.

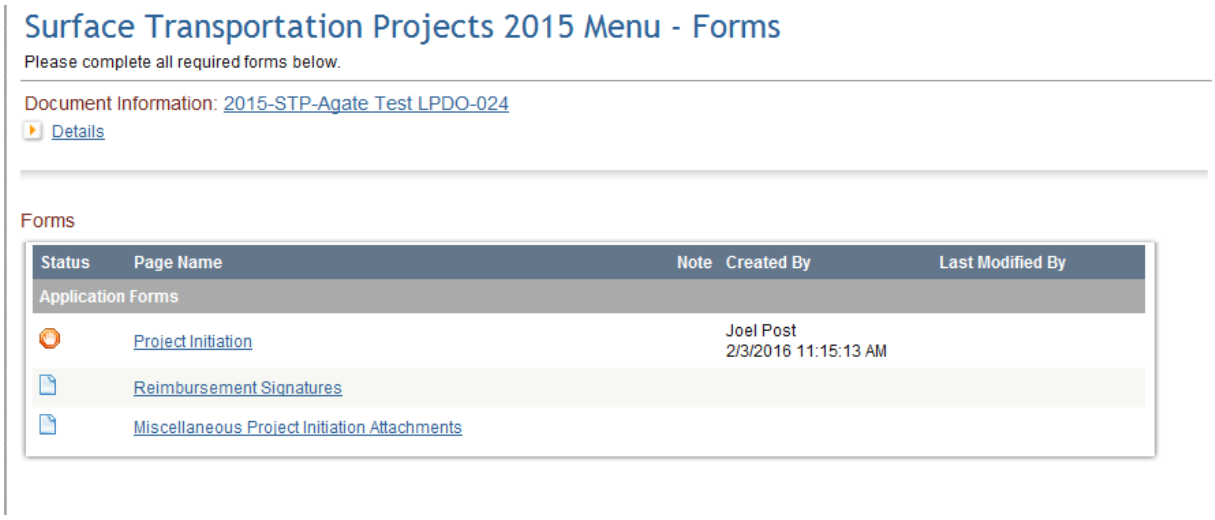


Figure 199: Document Forms Menu

When the icon on the far left of the menu is a stop sign , that indicates the page has an error on it. When the icon is a pencil , that indicates the page has been saved at least once and is being edited or is complete.

Changing the Status

The **Change the Status** section allows an Agency Official, Agency Staff or Agency Administrator to submit an application, push documents to the next status, etc.

2. Select the ***View Status Options*** button to see which possible statuses are available.

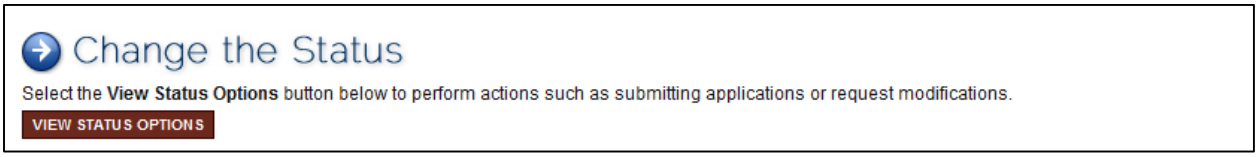


Figure 30: Changing the Status

3. This will bring up a list of possible statuses to choose from.

Figure 31: Available Status Options

Accessing Management Tools

The **Access Management Tools** section allows an Agency Official and/or Agency Administrator certain administrative responsibilities such as the ability to add/edit people to a proposal (attach users to an application) and view an application's status history.

1. Click on the ***View Management Tools*** button in the **Access Management Tools** section.

Figure 32: Access Management Tools

2. This will bring up a list of management tools to choose from.

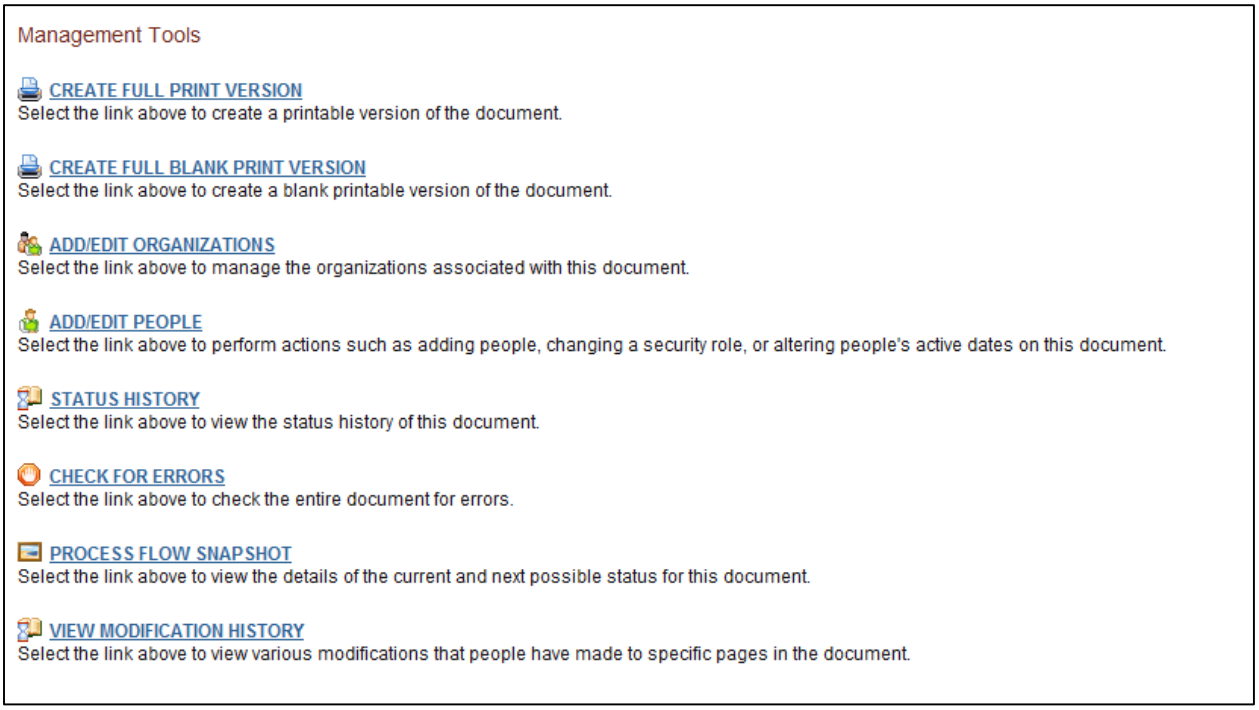


Figure 33: Management Tools

Management Tools:

- **Create Full Print Version** creates a printable version of the document for reading and/or saving (see Pg. 4 for Adobe Acrobat Reader requirements).
- **Create Full Blank Print Version** creates a form/template version (see Pg. 4 for Adobe Acrobat Reader requirements).
- **Add/Edit Organizations** is used to add organizations to the document.
- **Add/Edit People** is used to add people, change security, alter active dates, etc. See user guide section 9. Application/Grant User Management.
- Document **Status History** provides the statuses that a document has passed through.

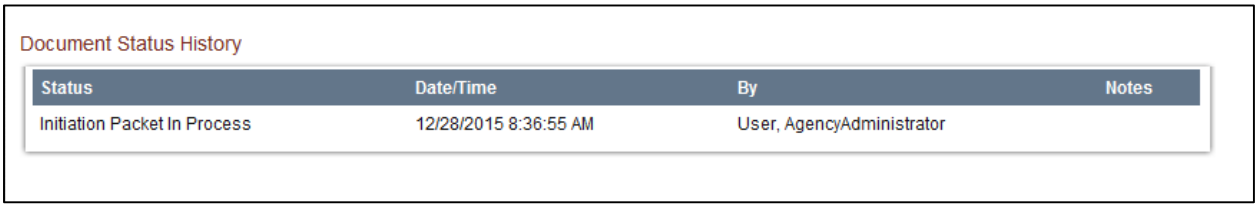


Figure 34: Status History

- **Check for Errors** checks document for errors and returns a list of links to pages with identified errors that need to be corrected before the document can be moved to the next status.

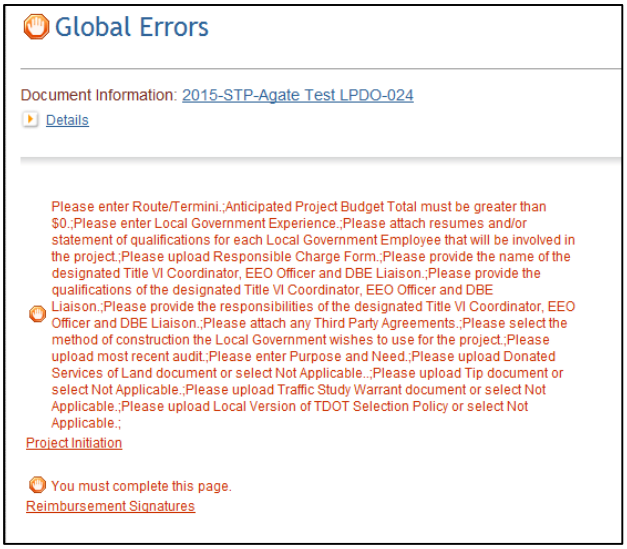


Figure 35: Global Errors

- **Process Flow Snapshot** is used to view the details of the current and next possible status that can be applied to the document.
- **View Modification History** is used to view various modifications that people have made to specific pages in the document.

Examining Related Items

The **Examine Related Items** section is where documents such as *My Invoices* and related messages are found.

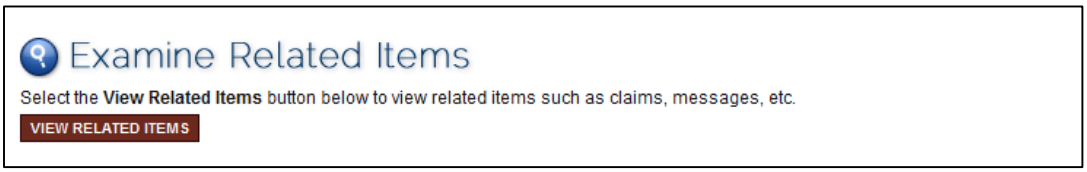


Figure 36: Examining Related Items

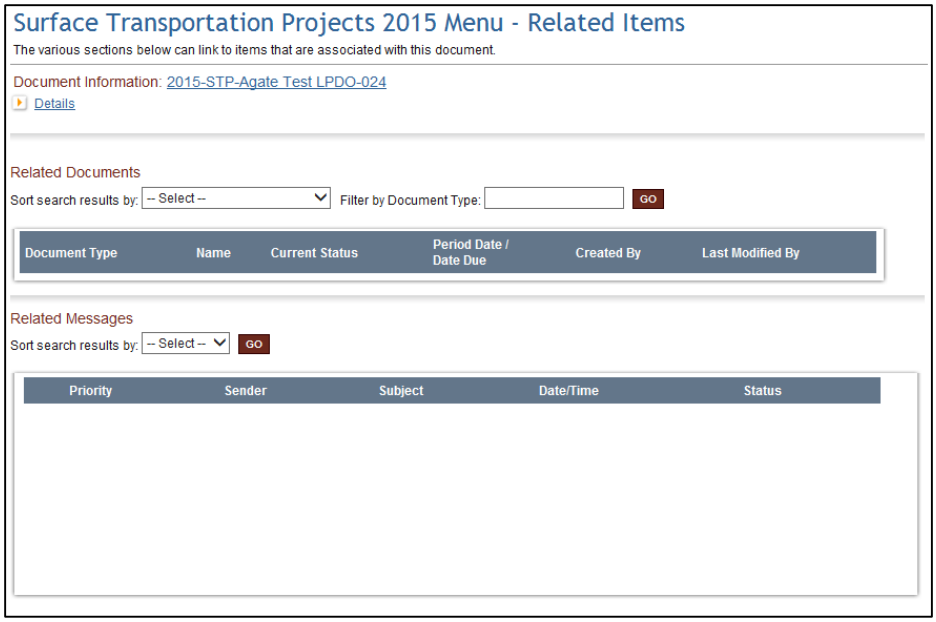


Figure 37: Related Items Menu

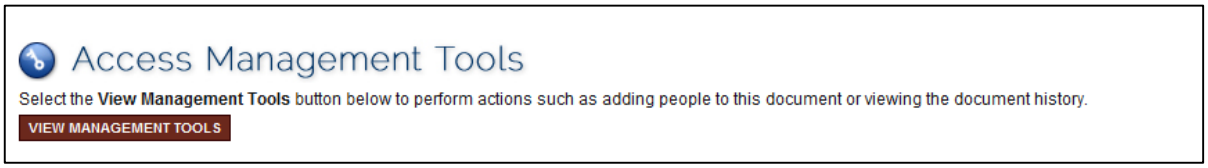
Application User Management

The Agency Administrators are responsible for adding and ensuring that appropriate users are assigned documents. Staff may assist the *Agency Administrator* with completing required forms. User access can be assigned or removed throughout a project's lifecycle.

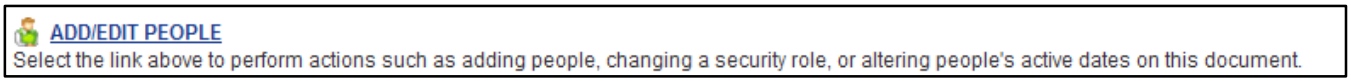
Assigning User Access to Application

To view the eGrants documents, or to assist with completing forms, a user must be linked to the documents. To add a user to a document:

1. Click on the **My Application** tab on the main page, then navigate to the specific application.
2. Click on the ***View Management Tools*** button under the **Access Management Tools** section.



3. Then, select the ***Add/Edit People*** link.



a. Type the name, or part of the user's name (at least 3 characters), in the **Person Search** field, and click the ***Search*** button.
b. Check the box in the column next to the desired person.
c. Select a role for the user along with an appropriate Active Date.
d. Click the ***Save*** button to complete adding the user to the document.

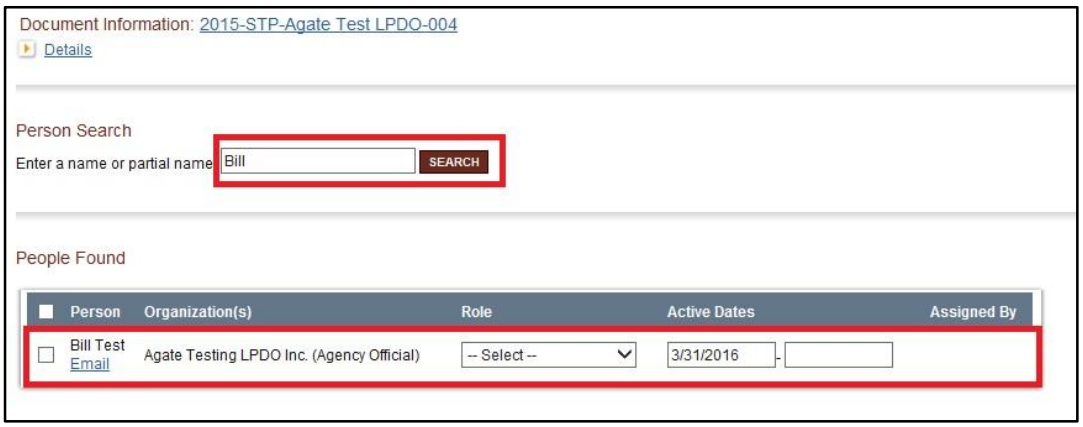


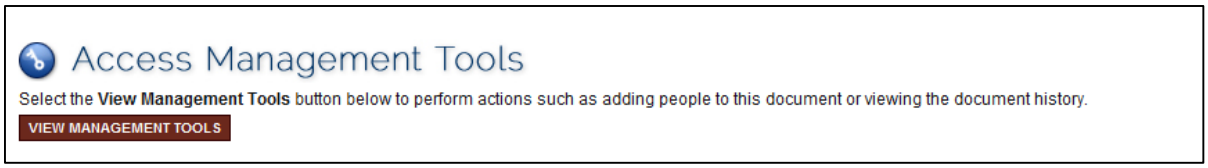
Figure 38: Person Search

4. Repeat this process to add additional users, if necessary.
5. Return to "Add/Edit People" to confirm that all users have been added correctly.

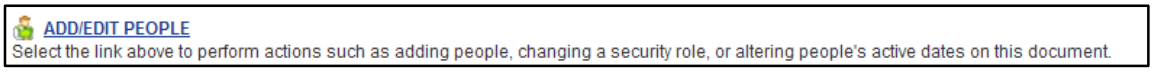
Removing User Access to Application/Grant

To remove a user from an eGrants document:

1. Click on the **Application/Grants** tab on the main page, then navigate to the specific application.
2. Click on the ***View Management Tools*** button under the **Access Management Tools** section.



3. Then, select the ***Add/Edit People*** link.



4. Type the name, or part of the user's name (at least 3 characters), in the **Person Search** field, and click the ***Search*** button.
5. Check the box in the column next to the desired person.

Edit the second box **Active Dates** to display a date in the past. The user will not be able to access the document before a specified start-date (first field) or after a specified end-date (second field).

6. Click on the ***SAVE*** button.

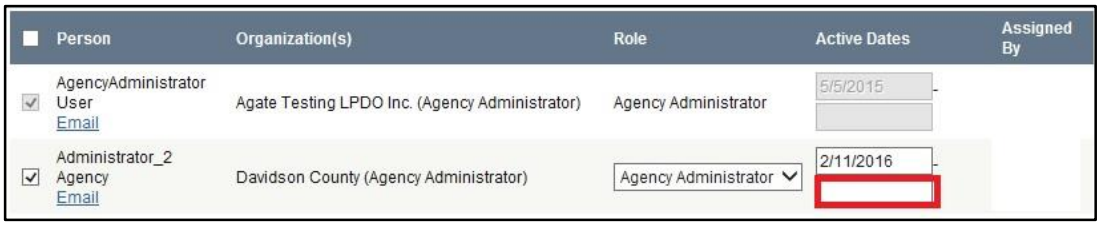


Figure 39: Active Dates

Forms Completion

On the **Application** Form Menu of a specific application, the forms within an application are shown. These are the forms that must be completed before submitting the proposal. The following sections go through the information necessary to complete an application.

Navigating Forms

After opening a form, there are two ways to navigate.

1. Use the links following "You are here:"

Figure 40: You Are Here Links

2. Use the Navigation Links listed at the bottom of the page to navigate between pages.

Navigation Links provides access to next related pages. Select the appropriate page name to go to that form.

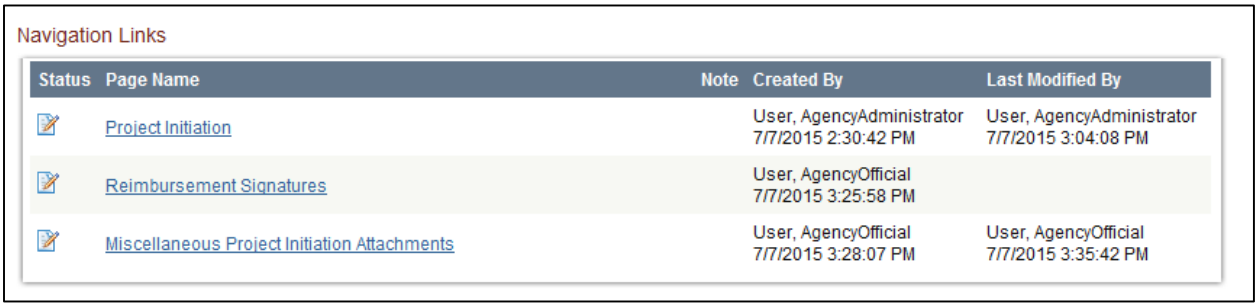


Figure 41: Navigation Links

Note: To ensure that changes made to a form are not lost, select the ***Save*** button before leaving the form. To return to the forms menu, where another form can be selected to complete, select the ***Forms Menu***.

Automatic Calculations

When possible, eGrants automatically calculates totals and other numbers. When information is entered on the page, the system takes the values that were entered, calculates and displays them.

Error Messages

When a form is saved and required fields are not filled-in, or on-screen application rules have been violated, an error message displays across the top of the page. Errors do not need to be corrected immediately, however to successfully submit the proposal, all errors must be corrected.

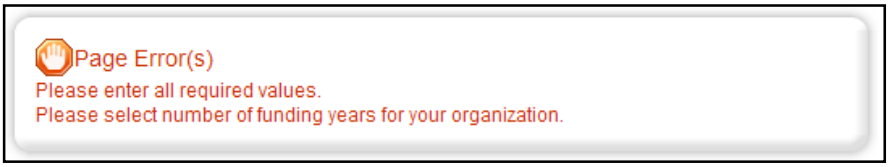


Figure 42: Page Errors

Uploading Attachments

- All attachments submitted via the eGrants system must not contain confidential/sensitive data that is not required to support the grants-management process.
- Before attachments are uploaded, sensitive information must be redacted. Examples of sensitive information include social security numbers (even if it is only the last 4 digits of an SSN), items such as bank account numbers (generally found at the bottom of a check), or credit card data.
- When not enough space is available to capture the type of information that is required on a form, a file upload feature is available that allows a file to be attached. The following file types are allowed: bmp, doc, docx, gif, jpg, pdf, png, ppt, tif, txt, wpd, xls, xlsx. Please ensure that there are no special characters in the file name.

1. To locate and upload a file, select ***Browse***.

Figure 43: File Uploads

2. Go to the folder that contains the file, select the file, and click on the ***Open*** button.

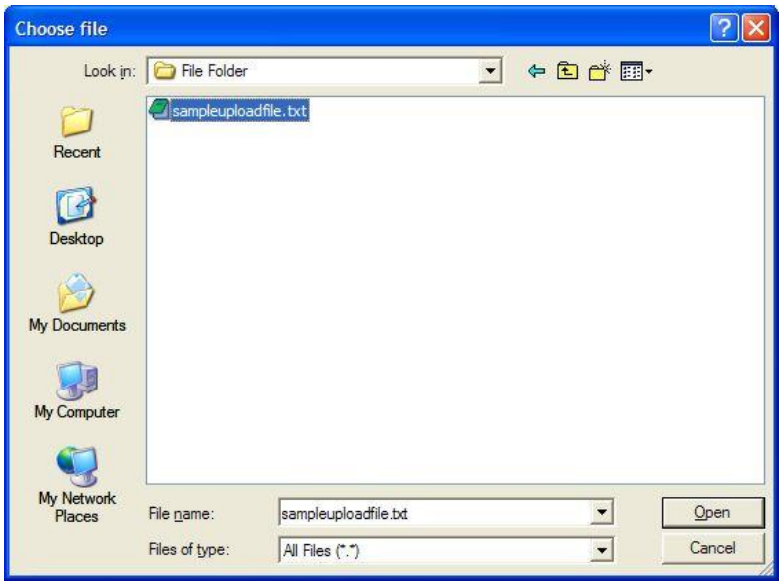


Figure 44: File Upload Browse Box

3. After the page reloads, select the ***SAVE*** button.

Printing (PDF)

On many pages a "Print Version" button is available that automatically creates a printable Portable Document Format (PDF) version. This dynamic PDF can be printed, or saved to a computer. It is good practice to review the PDF files carefully for accuracy prior to submitting (see Pg. 4 for Adobe Acrobat Reader requirements).

Figure 45: Print Version Button

Copy and Paste Restrictions

Be cautious when using the copy and paste function of most word processing programs (e.g., MS Word) to transfer text into eGrants form fields or narrative text boxes.

- The eGrants system does not recognize some characters and formatting, such as tables, graphs, photographs, bullets, and some tabs.
- Also be aware of the different character limits of text boxes--attempting to copy and paste text that is longer than the allotted space returns an error message.
- The character limit is located at the bottom left of a text box.
- To avoid copy/paste errors, first copy and paste the text into Notepad or equivalent program. Notepad has similar formatting requirements to eGrants textboxes.