

1 E Grants Administration & Management System (EGrAMS)

1.1 Introduction

Welcome to the EGrAMS User manual. EGrAMS is a web based, end-to-end solution supporting the entire grant life cycle process. EGrAMS offers a streamlined solution to configure, find, apply and manage your grant application process quickly, efficiently and accurately. EGrAMS supports configuration of grant application packages, online grant application entry, application review, and submission of periodic progress reports.

Even if you have never used a computerized grants system before, you will find EGrAMS both quick to learn and easy to use. The user interface is user friendly and intuitive providing you with lookups, dropdowns and context sensitive help.

EGrAMS is a rule-based configurable application comprised of several modules. In addition, it also uses the EGrAMS security framework for user validation and authentication. Although there are several modules / sub-modules within the application a user will see only applications that are relevant to his/her role.

1.2 Intended Audience

The user manual provides a complete reference for the features and options available in EGrAMS. This document is primarily aimed at providing information to grantors, grantees, and reviewers on how to use the EGrAMS application. However, the audience may include representatives from the following groups:

1. Grantee Agencies
2. Grant Application Reviewers
3. Help Desk Personnel
4. State Information Technology Software Support Team

1.3 Organization of the User Manual

The user manual is organized to introduce activities that are common to all class of users. It then moves to individual roles and responsibilities within a role. All users are encouraged to read section 1, 2, and 3 of the manual carefully before using the system. In addition, users should also read the sections specific to their role.

1.4 Hardware and Software Requirements

Workstation	Pentium processor 333 MHz or higher
RAM Requirements	128 MB or higher
Operating System	Windows 98, 2000, XP
Browser	IE 6.0 and above or Netscape 7.0 and above

Other Requirements	Internet access, Printer, Adobe Acrobat Reader, Java Script enabled, and Pop-ups enabled
Screen Resolution	Works best at 1024 x 768 pixels but 800 x 600 pixels is acceptable

1.5 Getting Started

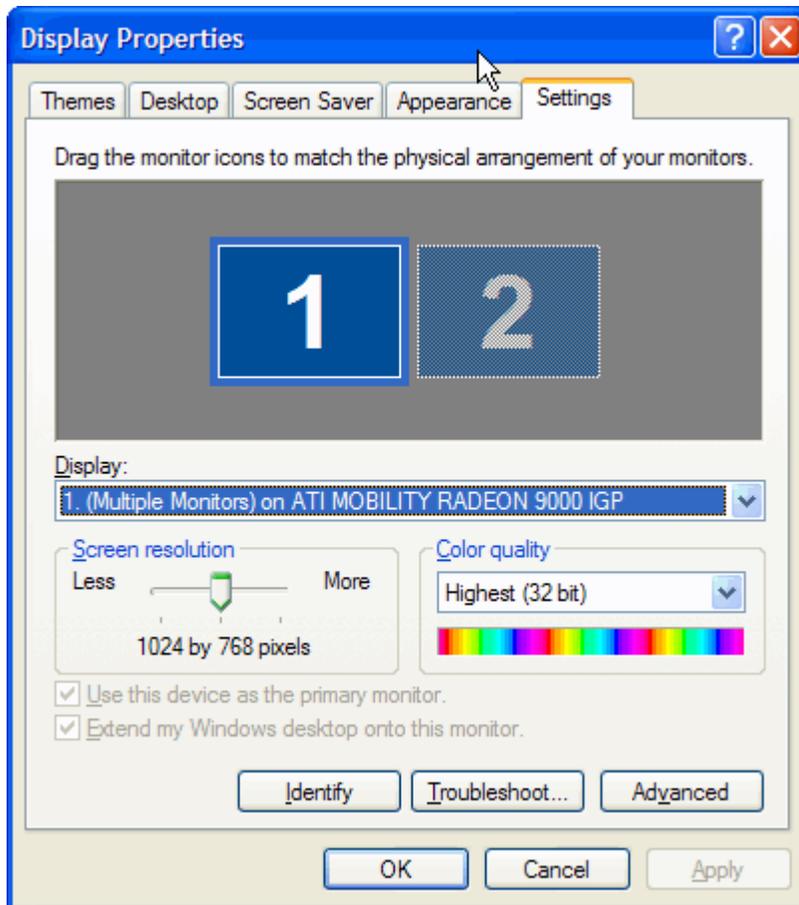
In order to access the EGrAMS application, you need to have a valid user name and a password. In addition, your user name must be active to access the system.

1.5.1 Desktop Settings

Before logging onto the system, you will need to verify the following computer desktop settings:

EGrAMS screens are designed to work best with monitors that are set to 1024 by 768 pixels (800 x 600 pixels work's as well). To check the setting on your computer:

1. Click the '**Start**' button at the bottom of your screen.
2. Select '**Control Panel**' and double-click '**Display**'. This is the screen you should see.



3. Select '**Settings**'
4. Ensure that the screen resolution is set to 1024 by 768 pixels. If not, move the slide bar to set the resolution to 1024 by 768 pixels and click '**Apply**' and then '**OK**' to close the popup box.

1.5.2 Access to the Application

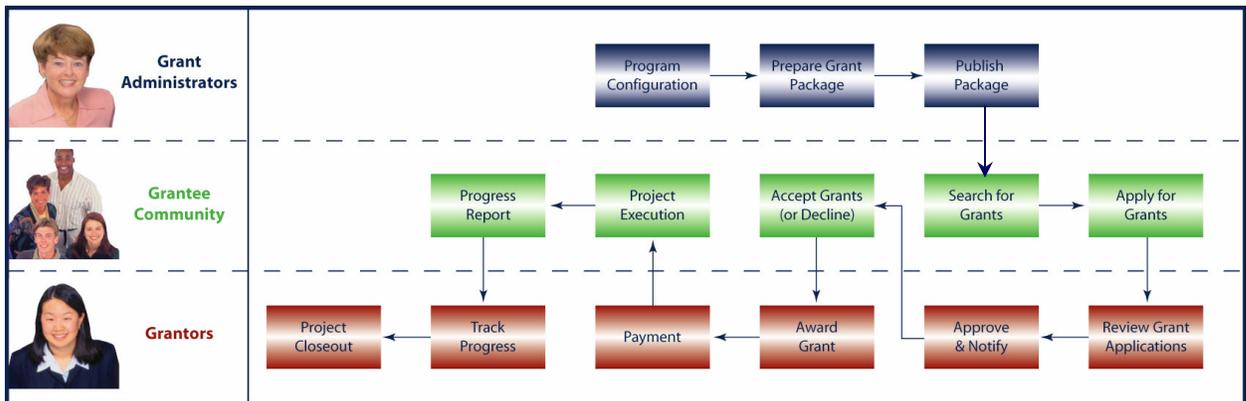
In order to check whether you have access to the EGrAMS application, perform the following steps:

1. Open your browser (Internet Explorer or Netscape)
2. Type in the URL given to you for accessing the EGrAMS application (eg. <http://yourstate.gov/EGrAMS>).
3. If you cannot access the application, ensure the following
 - a. You have access to the internet
 - b. The URL entered is correct
4. If you still have problems, contact your system administrator

This concludes the Introduction section of the EGrAMS user manual.

2 Application Overview

EGrAMS is a web-based application that manages the end-to-end grant life cycle. The grant life cycle involves interaction from various roles from inception through closeout of a grant. EGrAMS supports multiple agencies, offices/bureaus, and programs with their competitive and non-competitive grants. Its core technology is Microsoft.Net, which is scalable, modular, and configurable all while running on MS SQL Server. In addition EGrAMS utilizes iText library for PDF generation. Listed below is a high-level process overview of the grant life cycle together with interactions by the various roles.



2.1 Roles and Responsibilities in EGrAMS

The documentation makes references to various roles. Therefore it is important to have a common understanding of the various roles and their meaning within EGrAMS.

2.1.1 Roles:

Roles are selected when you create your user profile (Create EGrAMS Login option). A role is defined as a set of actions or activities to be performed by a person or group within EGrAMS. This role will determine the access level for a person within EGrAMS. An individual may have only one role type.

2.1.2 Responsibilities:

In addition to a role, a user will have a responsibility or permission code at a grant application level. A responsibility is a set of actions or activities to be performed by a person or group in EGrAMS at a grant program level within a specific role. Each responsibility will determine the access of a person at a grant program level. The responsibility, or permission, codes are assigned to the user by the Grant Administrator. A user may have multiple responsibility or permission codes across grant programs.

2.1.3 Roles and Responsibilities Defined

This section covers in more detail the different roles and associated role responsibilities within EGrAMS. Roles and responsibilities are fluid items. They

may be adapted to a variety of different grant requirements by agency. The roles and associated responsibilities detailed below are merely an overview of the many different possibilities to be tailored to your specific grant needs.

2.1.3.1 Administrator

The **Administrator** role may be defined as an individual responsible for various administrative functions within the EGrAMS system. There may be several classes of administrators depending on respective state agency needs – e.g. Application Administrator, Security Administrator, Grant Designer, etc. Listed below are some of the responsibilities or permission codes that can be assigned to an **Administrator** role:

- **Application Administrator** - The primary responsibilities of an **Application Administrator** are to set up the various parameters and master codes that are required by the system. In addition, the application administrator also defines the different texts found within the system. This would encompass items with text such as the welcome page, home page, and email. The **Application Administrator** also maintains the state agency profile within the EGrAMS system.
- **Security Administrator** - The primary responsibilities of a **Security Administrator** are to set up the various roles, permission codes, password validation rules, and security questions in the EGrAMS system. In addition, the **Security Administrator** also defines role based access permissions to the screens and user administration (eg. Activate users, change user role or parent agency, etc).
- **Grant Designer** - A **Grant Designer** is mainly responsible for configuring the grant application package as applicable for the respective grant program. The role includes meeting with the business/program users to gather the grant program requirements and transcribing the requirements into the EGrAMS system. This is a techno-functional role and an individual assigned to this role should have adequate understanding of the technology and business rules. The configuration responsibilities include defining the required workflows, grant program business rules, various sections of the grant application (face sheet, narrative, budget, etc), review checklists, reporting requirements, statistical reports, and contract templates.

2.1.3.2 Grantor Office

The **Grantor Office** role encompasses all of the responsibilities of the grantor. This role is responsible for many grantor activities such as grant setup, funding allocation, grant approval, and reporting to name a few.

Listed below are some of the responsibilities or permission codes that may be assigned to a **Grantor Office** role:

About EGrAMS.doc	Ver: 2.0	RD: 05 Oct 2006	Page 5 of 34
------------------	----------	-----------------	--------------

- **Grant Administrator** – a person from the grantor agency who is responsible for administering the grant. The Grant Administrator is primarily responsible for assigning state agency users to the program, approving allocations (for non-competitive grants), creating review teams, assigning applications for review, reviewing review status, review and approval of grant applications and progress reports. In addition, a grant administrator can perform all the duties specified for data entry. A grant administrator may also be referred to as a Program Manager or Grant Monitor.

2.1.3.3 Grantor

The Grantor is an individual or group from the grant giving agency who performs the various grant program level tasks. A Grantor may be defined as an individual, agency or organization **from whom** a grant is made or a trust is set up. The grantor is responsible for communicating to potential grantees, approval of grant applications, disbursing the grant, and monitoring the progress. A grantor is also referred to as an Implementing Agency in the EGrAMS documentation. Depending on the size of the state agency, the grantor role may be classified into program, finance and contracts. Each of the roles: grantor, program, finance, or contracts may have various permission or responsibility codes in regards to the different levels of access within the grant program.

Listed below are some of the responsibility or permission codes that may be assigned to a grantor or program role:

- **Grant Administrator** – a person from the grantor agency who is responsible for administering the grant. The Grant Administrator is primarily responsible for assigning state agency users to the program, approving allocations (for non-competitive grants), creating review teams, assigning applications for review, monitoring review status, review and approval of grant applications, and progress reports. In addition, a grant administrator can perform all the duties specified for data entry. A grant administrator may also be referred to as a Program Manager or Grant Monitor.
- **Data Entry** – a person from the grantor agency who is responsible for entering paper grant applications into EGrAMS. It is possible in the early years of implementation that all grantee agencies may not submit their grant applications electronically. However, to ensure consistent evaluation and to maintain a central repository of grant applications, the paper grant applications will have to be entered into EGrAMS.
- **Reviewer** – a person from the grantor agency who is responsible for reviewing and activity scoring of the completed grant.
- **Contract Manager** – a person from the grantor agency who is responsible for first level approval of grant applications, progress reports and monitoring the progress of the contract execution.

2.1.3.4 Finance and Budget

The finance and budget role may be defined as an individual who is responsible for the approval of the budget of a grant. This role handles tasks such as approving budget PCA amounts, index codes, and AOCs in the budget approval stage.

Due to the various workflows of grant budgets these responsibilities allow for budget approval to go through different levels. This is meant to allow for situations where more than one person approves in the order of their designation within an organization. Listed below are some of the responsibility or permission codes that may be assigned to a grantor or program role:

- **Approval Authority Level – 1** - Level one approval authority
- **Approval Authority Level – 2** - Level two approval authority
- **Approval Authority Level – 3** - Level three approval authority
- **Approval Authority Level – 4** - Level four approval authority

2.1.3.5 Contracts

The contracts role may be defined as an individual or group from the grant giving agency which performs the various contract administrations and management tasks associated with a grant.

Listed below are some of the responsibility or permission codes that may be assigned to a **Contract** role:

- **CTS Coordinator** – a person from the grant giving agency responsible for coordinating the contracts.
- **Admin Services Manager** – a person from the grant giving agency responsible for administrative services.
- **Contract Management Liason** - a person from the grant giving agency responsible for the contract outreach.
- **Contract Manager** - a person from the grant giving agency responsible for managing the contract staff.

2.1.3.6 Grantee Office

The Grantee Office role may be defined as an individual or group from the grantee agency that acts as a local administrator. More than one person in a grantee agency can have a grantee office role. The grantee office role can perform a number of different function's, such as updating the grantee agency profile information or assigning grantee agency users to a specific grant application.

Listed below are some of the responsibility or permission codes that may be assigned to a Grantee Office role:

- **Local Administrator** – a person from the local grantee agency who is responsible for the administrative duties for the grant process at the local level.

2.1.3.7 Grantee

A grantee may be defined as an individual, agency or organization **to whom** a grant is made. The grantee is responsible for identifying potential grants, filling out the grant application and submission of periodic progress reports.

Listed below are some of the responsibility or permission codes that may be assigned to a grantee role.

- **Project Director** – is a person from the grantee agency who is responsible for performing administrative tasks within his or her agency. The Project Director is responsible for registering his or her agency in EGrAMS, authorizing access to users to grant applications within their grantee agency, submitting grant applications, and progress reports. In addition, a project director can perform all the duties specified for a grant writer.
- **Grant Writer** – is a person from the grantee agency who is responsible for entering a grant application in EGrAMS.
- **Peer Reviewer** – is a person from the grantee agency who is responsible for the peer review of a completed grant application.

2.1.3.8 Designated Local Council

A designated local council may be defined as an individual, agency or organization **to whom** a grant is made. The grantee is responsible for identifying potential grants, filling out the grant application and submission of periodic progress reports. A designated local council is similar to a grantee agency. In addition, they also have the responsibility of reviewing grantee grant applications for certain grant categories, before they are submitted to the grantor agency by the grantee.

Listed below are some of the responsibility or permission codes that may be assigned to a grantee role:

- **Project Director** - is a person from the grantee agency who is responsible for performing administrative tasks within his or her agency. The Project Director is responsible for registering his or her agency in EGrAMS, authorizing access to users to grant applications within their grantee agency, submitting grant applications, and progress reports. In addition, a project director can perform all the duties specified for a grant writer.

- **Grant Writer** – is a person from the local council who is responsible for entering a grant application into EGrAMS.
- **Reviewer** – is a person from the local council who is responsible for reviewing grantee grant applications (for certain grant categories) before they are submitted to the grantor agency by the grantee.

2.1.3.9 Multipurpose Collaborative Board

A multipurpose collaborative board may be defined as an individual, agency, or organization that is responsible for reviewing and endorsing grantee grant applications, for certain grant categories, before they are submitted to the grantor agency by the grantee.

2.1.3.10 Reviewer

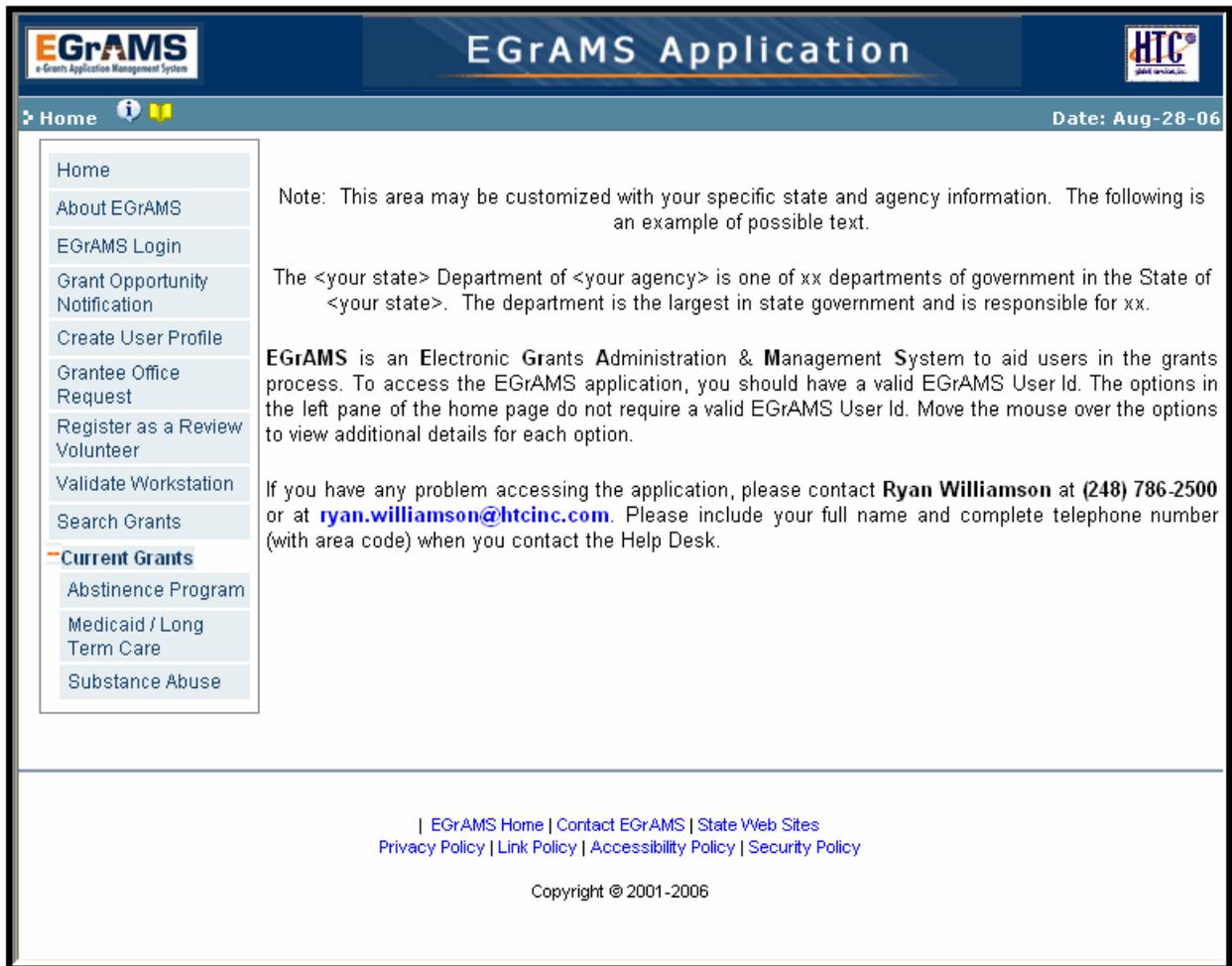
A reviewer is an individual who is responsible for conducting an independent review, scoring, and making recommendations for a grant application. The reviewer can be a member of the grantee, grantor, local council community, or volunteers. Reviewers may be assigned to multiple applications for review and the same grant application may also be submitted to multiple reviewers.

3 Understanding the Application

In order to use the application, you have to launch the application from your browser.

1. Open your browser (Internet Explorer or Netscape)
2. Type in the URL given to you to access the EGrAMS application (eg. <http://name-of-agency.state.us>).

If the application has been launched successfully, you will see the following screen:



All screens are divided into three main sections – Header, Body, and Footer.

3.1 Screen Header section

All screens support consistent header information, which consists of the implementing agency logo, the application logo, and your browser controls.

Listed below is an example of an EGrAMS screen header section:

About EGrAMS.doc	Ver: 2.0	RD: 05 Oct 2006	Page 10 of 34
------------------	----------	-----------------	---------------



The header screen has additional features to assist you while using EGrAMS. The left hand side of the header has items to assist with system navigation, additional information, and user manual help.



The far left of the header bar displays what EGrAMS screen you are currently accessing. In the above example the header is displaying that you are on the **Home** screen.

The middle icon represents the **Current Screen Information** button.  Clicking on this icon will activate the **Screen Help Text** box. This text box will display additional high level information about the specific screen you are on.

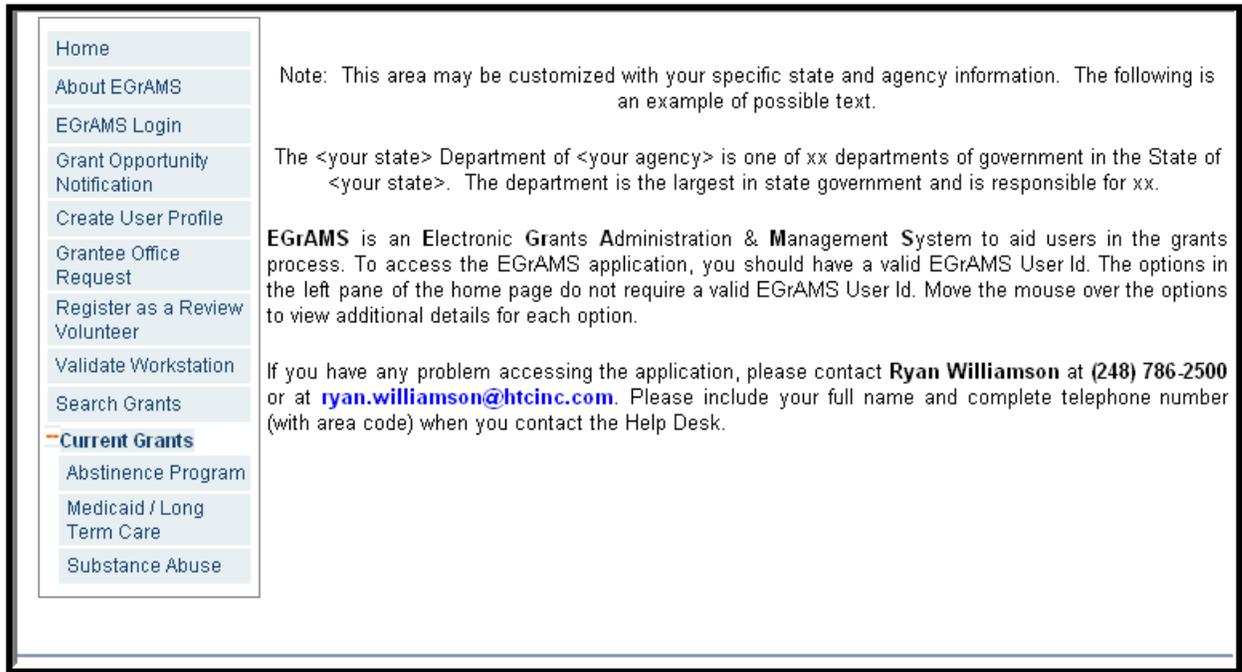
The yellow icon on the right is the **Screen Help** button.  Clicking on this button provides the detailed instructions and help for the screen you are on.

The far right of the header bar always displays the current date and amount of time left in your user session (while logged into EGrAMS).

3.2 Screen Body section

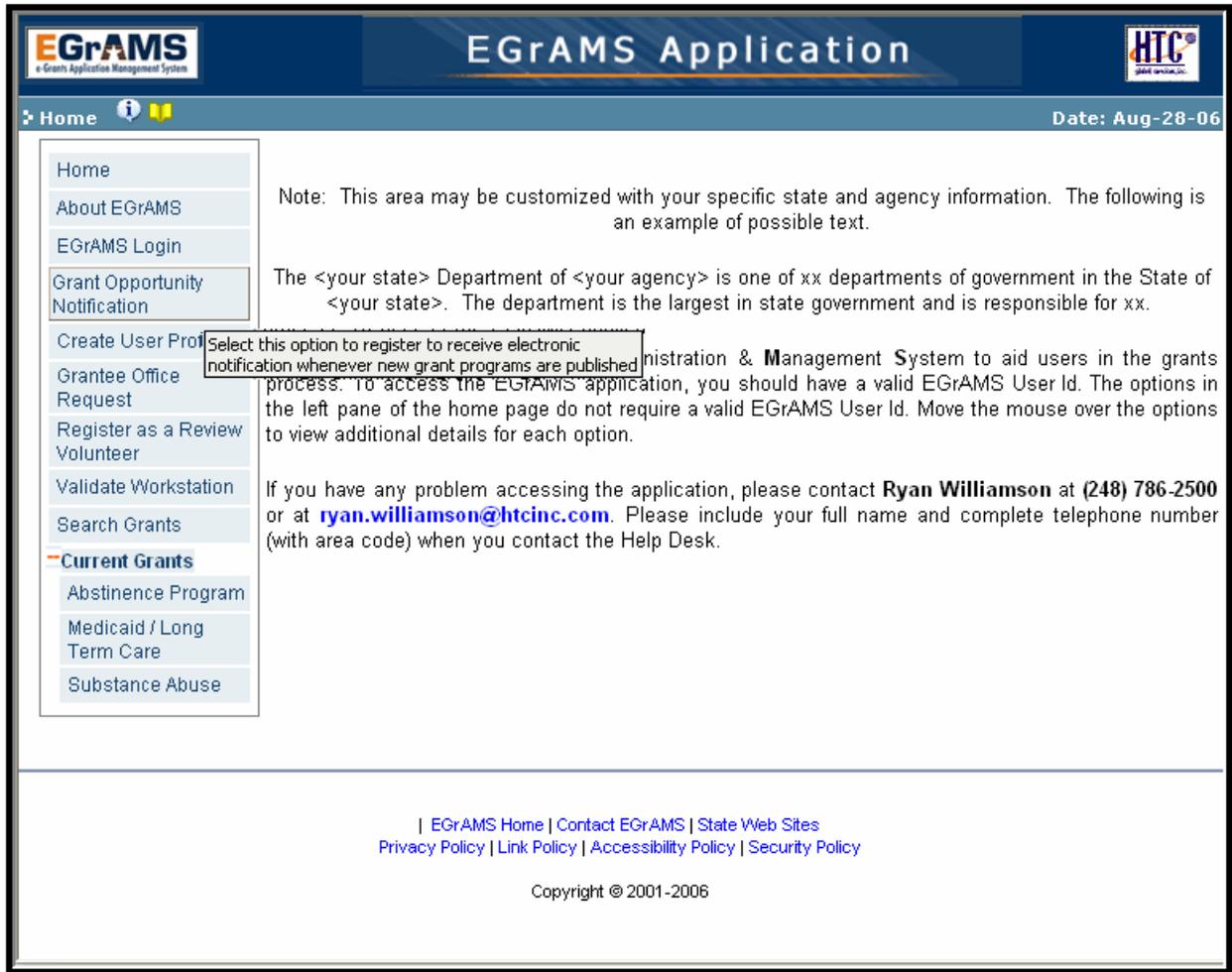
The body section of the screen contains the relevant information for the respective screen. **Note:** Many of the screen shots in this manual may not show the screen header and/or footer sections to ensure that the most significant content is displayed in a screen.

Listed below is an example of an EGrAMS screen body section:



If we look at the body section, the screen body is divided into two panes. In the right hand pane is a brief description of the implementing agency EGrAMS as well as the agency contact information. The text on the home page is available for customization with a brief description about your agency and state as well as agency logos. In the left hand pane is a list of options that may be accessed by any user. Placing the mouse on each option displays a brief tool tip describing what the option does. The bottom of the left hand pane has quick links to the current available grants for your agency.

Listed below is an example of the tool tip displayed by placing the mouse over 'Grant Opportunity Notification'.



3.3 Screen Footer section

All screens support consistent footer information. This section may be used for links to other web sites, displaying agency name, and identifying user name etc.

Listed below is an example of an EGrAMS screen footer section.



3.4 General Notes

In order to use EGrAMS effectively, it is very important to know the notations used as well as how to perform common tasks that are applicable to most of the screens. All screens within EGrAMS share common features such as:

- Comments and Help

- Error Reporting
- Optional and Mandatory data input
- Field Lookups

3.4.1 Comments and Help

All fields display a meaningful comment in the comment line at the bottom of the screen, if applicable, to aid the user in entering appropriate information.

Listed below is an example of a comment line for the Email field on the grant opportunity notification page.

The screenshot shows the EGrAMS Application interface. At the top, there is a navigation bar with the EGrAMS logo, the text 'EGrAMS Application', and the HTC logo. Below this is a sub-header with 'Grant Opportunity Notification', a timeout indicator 'Timeout Left: 20 mins', and the date 'Date: Aug-28-06'. The main content area is divided into a left sidebar with navigation links (Home, About EGrAMS, EGrAMS Login, Grant Opportunity Notification, Create User Profile, Grantee Office Request, Register as a Review Volunteer, Validate Workstation, Search Grants, Current Grants) and a main registration form. The form includes a 'Disclaimer' section, an 'I Agree' checkbox, and a 'Register for grant opportunity and notification' section with input fields for *Email, *Agency Name, *First Name, and *Last Name. Below these are tables for selecting a category and agency. At the bottom of the form, there is a 'Comment Line' with the text 'Enter your email address'.

The cursor is on the Email field and the comment displayed below gives a brief field specific instruction for data entry.

Comment Line:

3.4.2 Optional and Mandatory Input

All fields prefixed by “*” are mandatory and cannot be left blank. Below is an example of a mandatory field on the User Setup screen:

3.4.3 Field Lookups

EGrAMS expects certain valid values for code fields. In order to aid the user with the valid choices, all data fields support field lookups where applicable. All EGrAMS field lookups offer the following functionality:

- User defined search criteria on code and description fields
- Wild Card searches – prefix, suffix, and in between. **Note:** the wild card character is ‘%’
- Sorting by Code or Description in both ascending and descending order

To determine whether a field supports a field lookup feature, check for the following icon next to the field:

Field lookups enable users to select the appropriate value from a list of available choices. To invoke a lookup, click on the field lookup icon. Based on the field, the system will display all of the available values. The displayed set of values is sorted in ascending order of description by default. If you prefer viewing the available values by descending order simply click on the field header you would like to sort by. After the lookup has been invoked you may then select your desired record by clicking on the check box located on the left hand side of the lookup screen.

The example below displays a lookup for county:

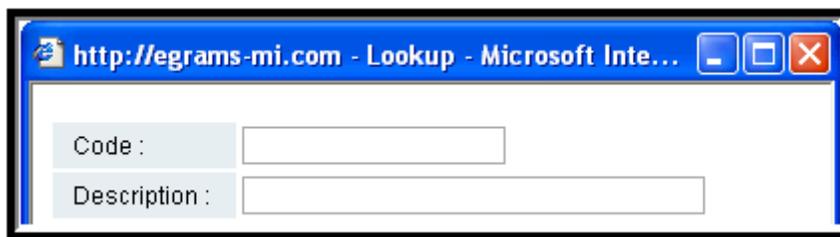


By default, the lookup window displays all applicable data for the respective field. To narrow down the search, enter the required search criteria in part or full in the 'Search Criteria' section of the window. (You may prefix or suffix the criteria with '%' to denote a wildcard).

The field lookup window is comprised of four sections:

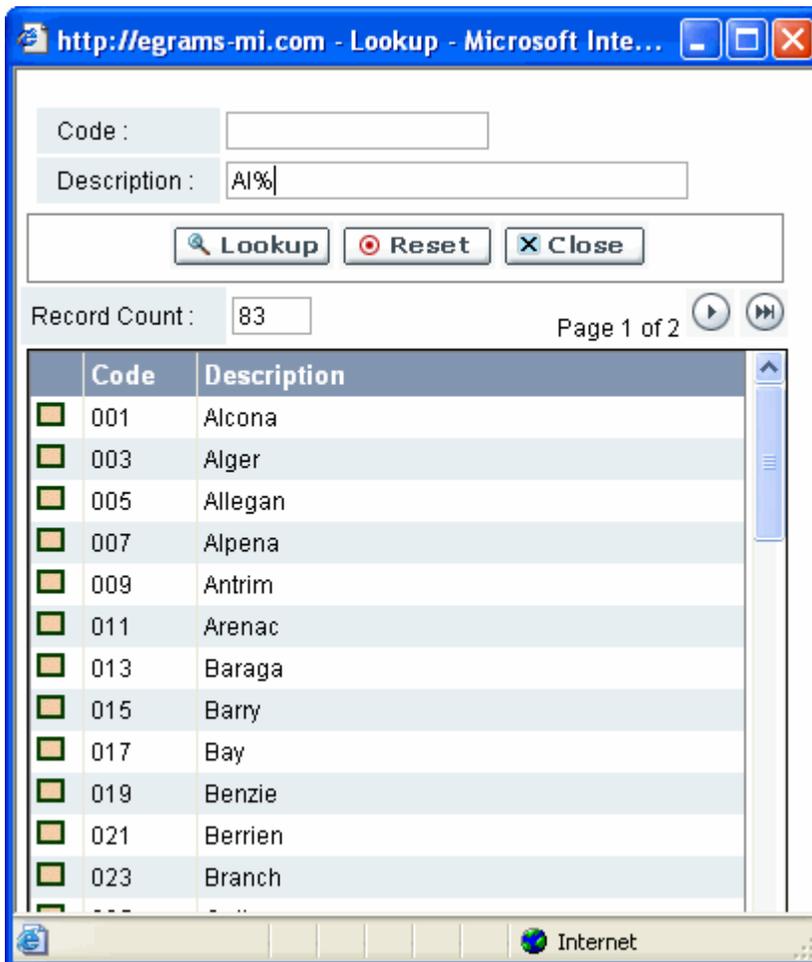
3.4.3.1 Search criteria

This section is displayed in the upper part of the window and is used to enter any selection criteria. Listed below is the search section of the lookup window.

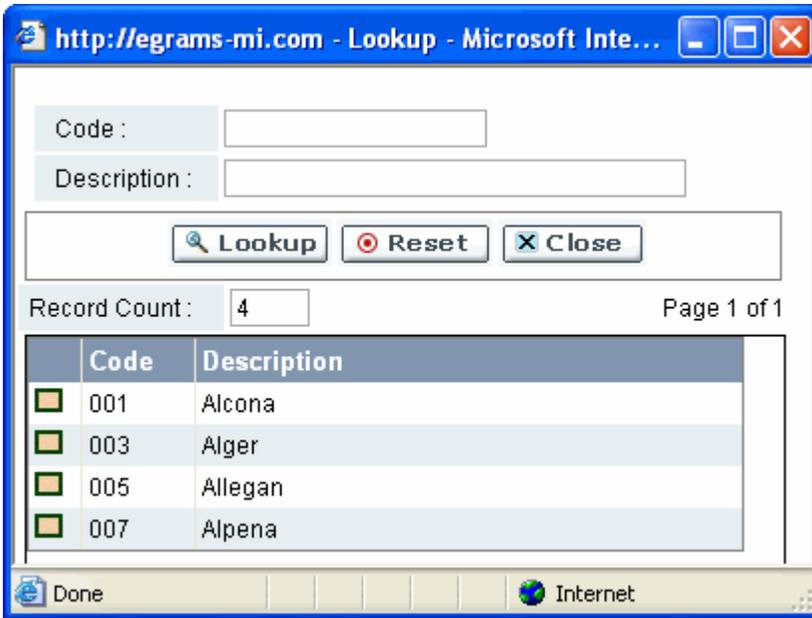


A user may enter a code and/or description as search criteria. You may prefix or suffix the criteria with '%' to denote a wildcard.

For example if you wish to search all counties starting with 'AI', you can simply specify **AI%** in the Description field of the search criteria section.



After clicking on the 'Lookup' button the system will display all counties that begin with 'AI'.



3.4.3.2 Action Buttons

This section displays the action buttons (or options) supported by the lookup window:



- **Lookup** – Click this option after entering your search criteria. If you select lookup mode without entering any search criteria, all relevant data for the field will be displayed in the results display grid.
- **Reset** - Use this option to clear out the search criteria entered.
- **Close** - Use this option to cancel the search and return to the main screen.

3.4.3.3 Navigation Buttons

This section displays the total number of records (record count) found during the search. In addition, it also allows the user to navigate through the result set. Listed below are the navigation buttons for a lookup window:



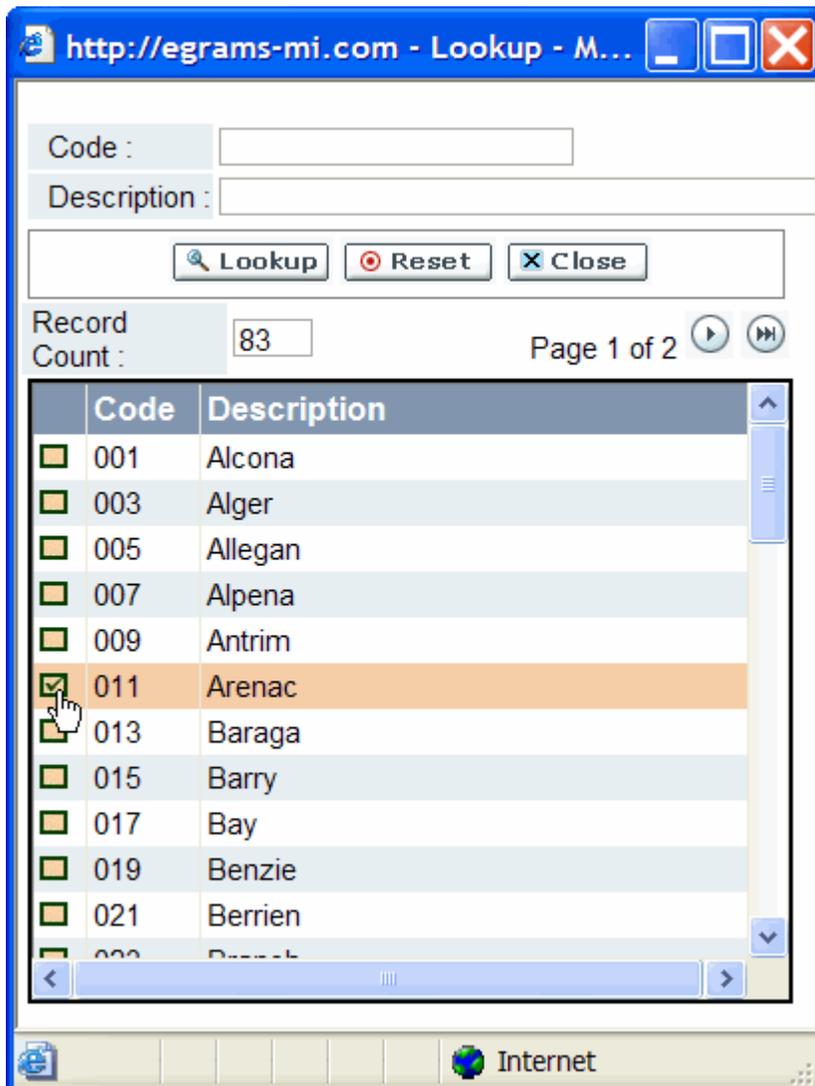
The lookup window displays 50 records per page. If the returned result set contains more than one page, the system displays the total number of pages and also tells you the page you are currently on.

Click on the appropriate navigation control to perform the desired action. Listed below is a description of the action performed by the navigation controls.

-  - Go to the next page
-  - Go to the last page
-  - Go to the previous page
-  - Go to the first page

3.4.3.4 Results Display

This section displays results of the search in multiples of 50 rows per page. Use the navigation buttons to navigate through the pages and use the vertical scroll bar to navigate within each page. Listed below is the results display section of the lookup window.



To select the required row:

1. Move the cursor to the respective row
2. Click on the select icon () in the left most column of the row (highlighted above)

To cancel the search and return to the main screen, click on the **Close** option button.

3.4.4 Note on Wildcards

A wildcard may be defined as a symbol that stands for one or more unspecified characters. Wildcards may be specified as a prefix or as a suffix. The “%” character is the wildcard symbol used while utilizing the find mode.

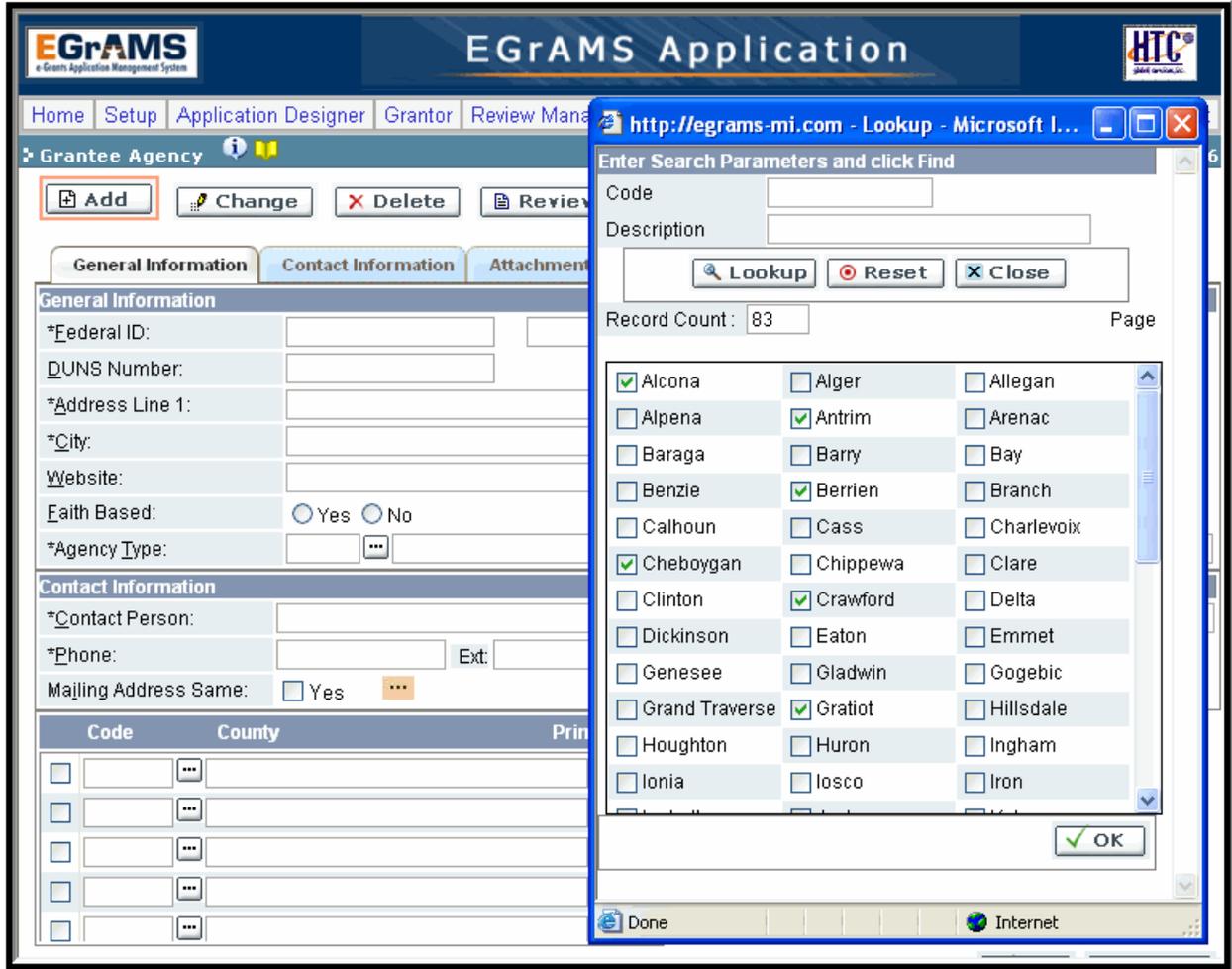
3.4.5 Sort Options

Some of the multiple record data entry screens support dynamic sorting in the results displayed grid. Individual screen documentation may identify the screens that support this feature. Sorting on each field is enabled by clicking on the respective field heading.

The sort works as an ascending/descending toggle. If the displayed list is displayed in the ascending order and you click the heading again, the list will display in descending order.

3.5 Multi-Value Lookups

Multi-value lookups enable users to select the appropriate values(s) from a list of available choices. This option is extremely useful when a user has to select multiple values. The user simply selects all of the desired records, in this case counties, and then clicks on the ‘**OK**’ button to save the selection. The multi-value lookup search function is the same as previously described for a standard lookup. Below is an example of a multi-value lookup:



3.6 Calendar Lookups

Calendar lookups enable the user to select the appropriate date value across month and year. All date fields support calendar lookups where applicable.

To determine whether a date field supports a calendar lookup feature, check for the following icon next to the field.



To launch a calendar lookup, click the above icon located to the right of the date field. You will see the calendar lookup window as shown below.



By default, the calendar lookup displays the current month and year with the current date selected. You may navigate to the desired month and year based on the controls located on the top of the calendar lookup.



The calendar navigation controls allow you to do the following:

- << - Click on this button to view the current month in a previous year
- < - Click on this button to view the previous month in the current year
- > - Click on this button to view the next month in the current year
- >> - Click on this button to view the current month in a future year

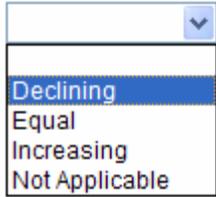
Navigate to the date you are looking for by utilizing the controls and click on it. Clicking on the date will return the value to the date field on the parent screen and close the calendar lookup window.

3.7 Field Dropdowns

Field dropdowns are supported when the choice of values is limited. To determine whether a field supports a dropdown feature, check for the following icon next to the field.



To invoke a dropdown, select the down arrow with your mouse. This will display the list of available values as displayed below. Move the mouse to the required value and click to select the required value. **Note:** A user may also use the up and down arrow keys to view the available choices after a dropdown box has been launched.

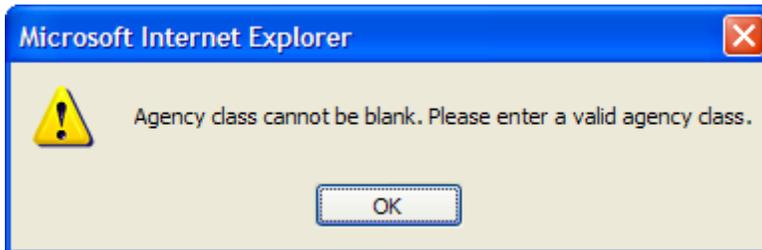


3.8 Error Reporting

All screen validations are done on-line and any errors encountered are reported to the user in the form of a dialog box. The error messages are explicit. The errors displayed are meaningful enough to give the user adequate information to determine the necessary corrective action. Error dialogs are categorized into the following categories.

3.8.1 Information Messages

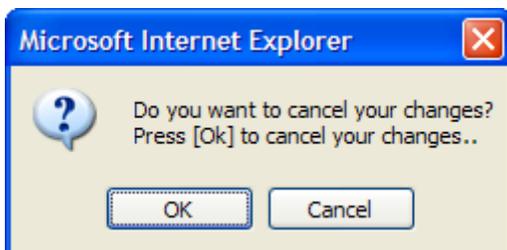
Information messages are to notify the user of an unexpected value or event in the system. The popup message tells the user of the problem and may recommend corrective actions, if applicable. An information message is displayed as follows:



Click on the **OK** button at the bottom of the information screen to acknowledge the message. On acknowledgement of the message, the application returns to the respective field.

3.8.2 Confirmation Messages

Confirmation messages are to re-confirm a certain action from the user. A confirmation message is displayed as follows:



The dialog offers two choices to the user:

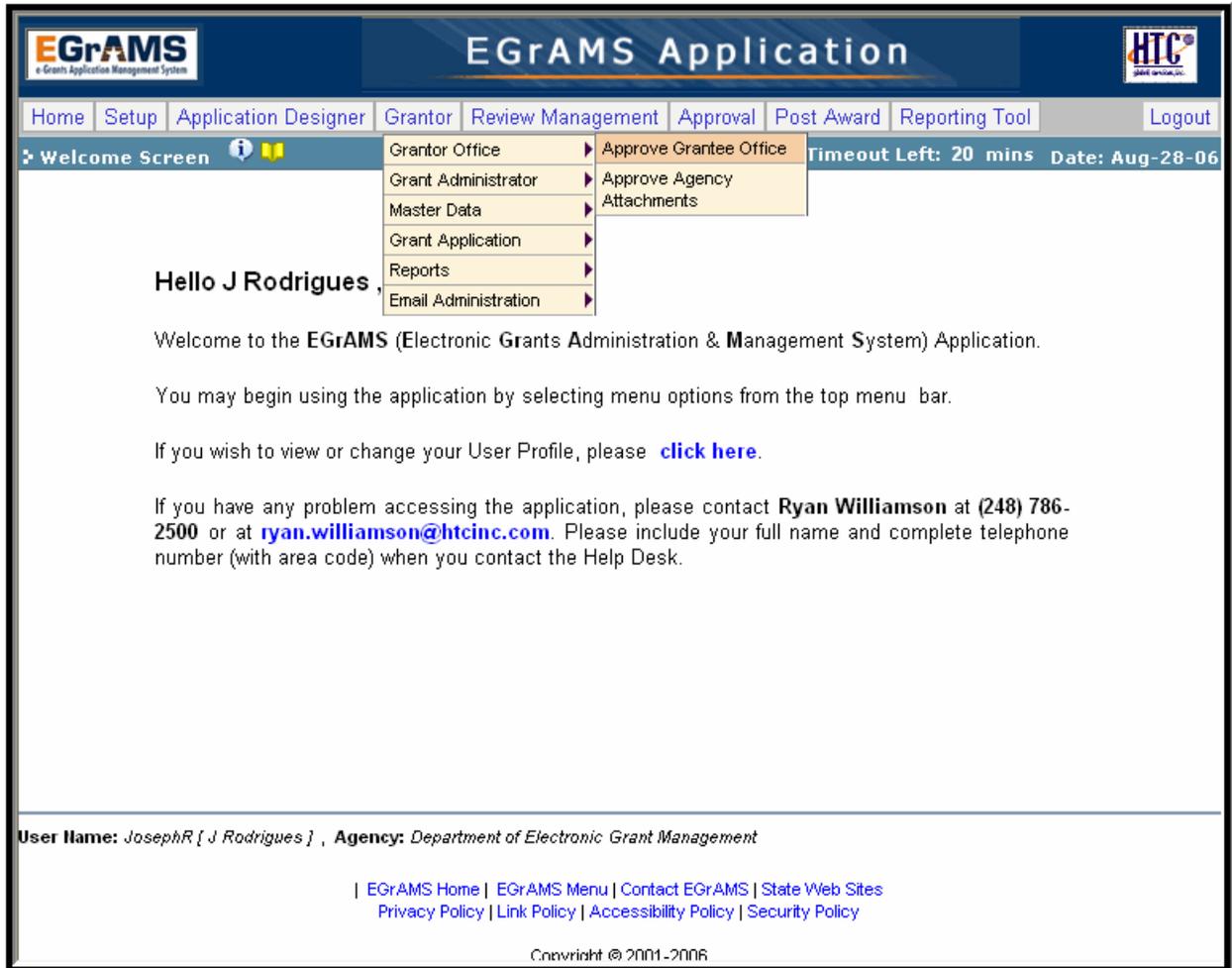
1. Click on the **OK** button at the bottom of the screen to confirm the respective action
2. Click on the **Cancel** button at the bottom of the screen to cancel the operation.

This concludes the Understanding the Application section of the EGrAMS user manual.

3.8.3 About Menus and Options

The EGrAMS application supports a configurable and dynamic menu generation module. Menus are generated based on a user role. Menus are a mechanism that allows users to access the various screens supported by EGrAMS after a successful login. The EGrAMS application supports three styles of menus – dynamic, drop down, and list.

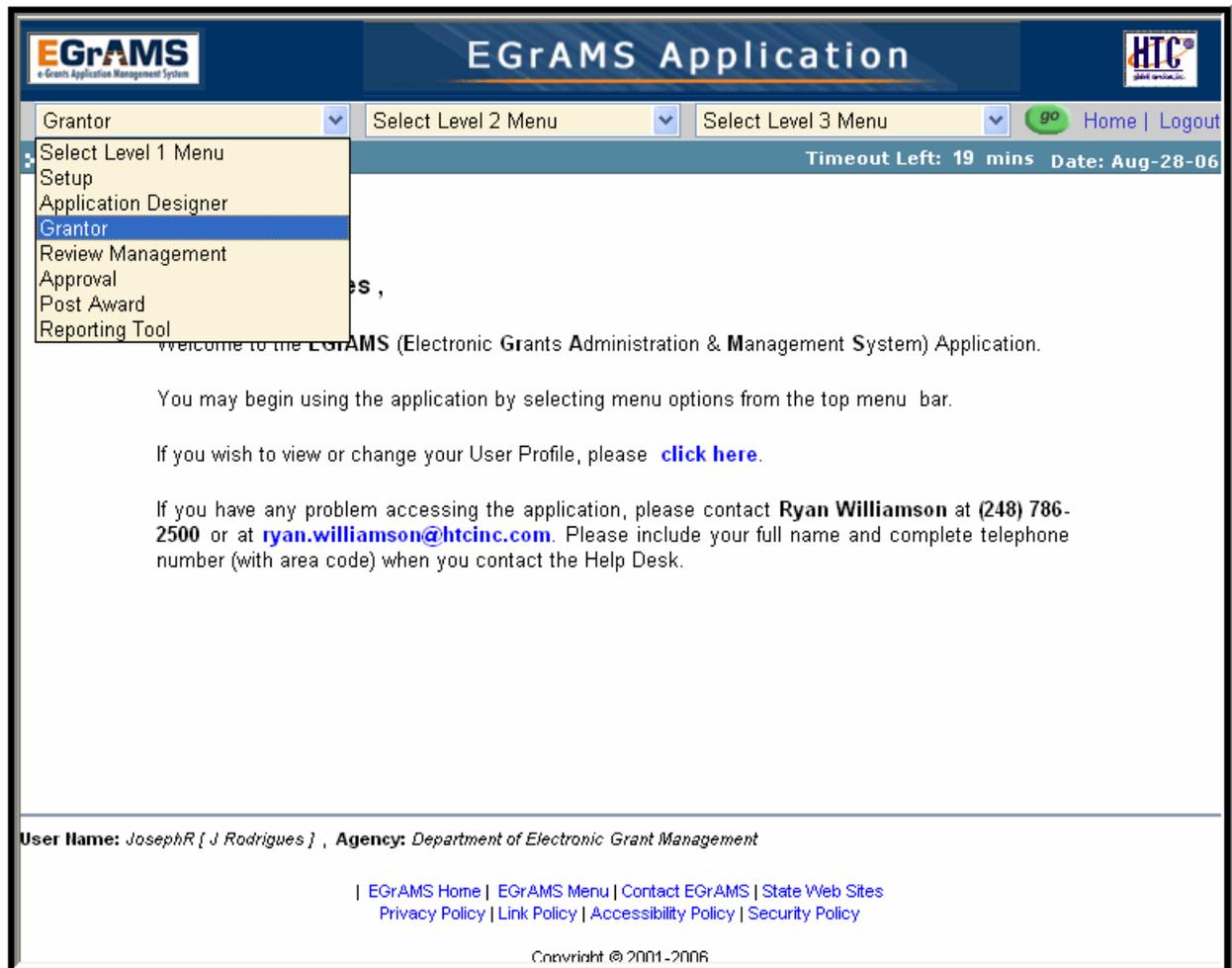
Listed below is an example of a **Dynamic** menu under the Grantor module;



To access the desired screen, place the mouse over the menu and the system will display a list of sub menus available underneath each menu. Placing the mouse on the required sub menu will display the available screen options/functions available under the respective sub menu. Click on the desired screen option/function to navigate to the required screen. A different way to conceptualize the dynamic menu is to envision the menus as different levels. Level 1 would be the **Grantor** menu. As you place your mouse over the level 1 module you will select the level 2 sub module, in this case the **Grantor Office**

sub module. After placing your mouse over the second level the level 3 choices are shown. In this example the level 3 sub menu module is the **Approve Grantee Office**.

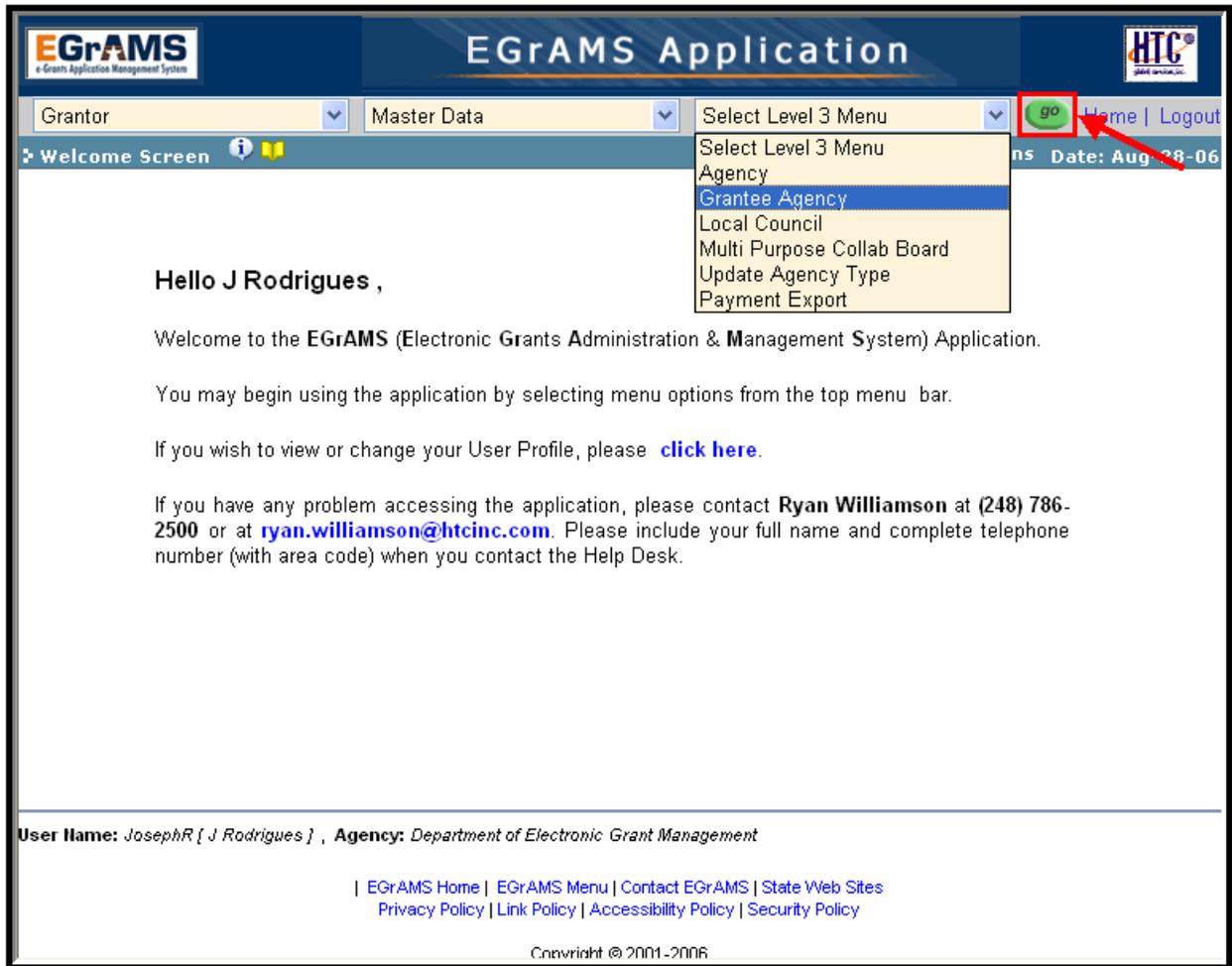
Listed below is an example of a **Dropdown** menu:



All of the grantee and review users will be given the drop down menu by default. If you prefer the dynamic menu, instead of the drop down menu, you may change the menu style manually under your user settings by clicking on the change 'User Profile' hyperlink located on the welcome screen.

In a drop down menu style, the Menu bar is subdivided into three sections to denote the nesting levels within each module. To select the desired option, select the option at the first level (left side of the menu bar) by clicking on the down arrow and then clicking on the required option. An example of this would be "Grantor" for the main module.

On completion of the main module selection, select the required sub module or program from the next menu level. In this example “Master Data” has been selected for the sub module. After the level 2 menu has been selected you may select your menu 3 sub module. When your menu selections have been completed, click on the green ‘Go’ button to access the screen.



Refer to the respective sections for details on each module functionality and user instructions.

Notations used to denote a screen are as follows:

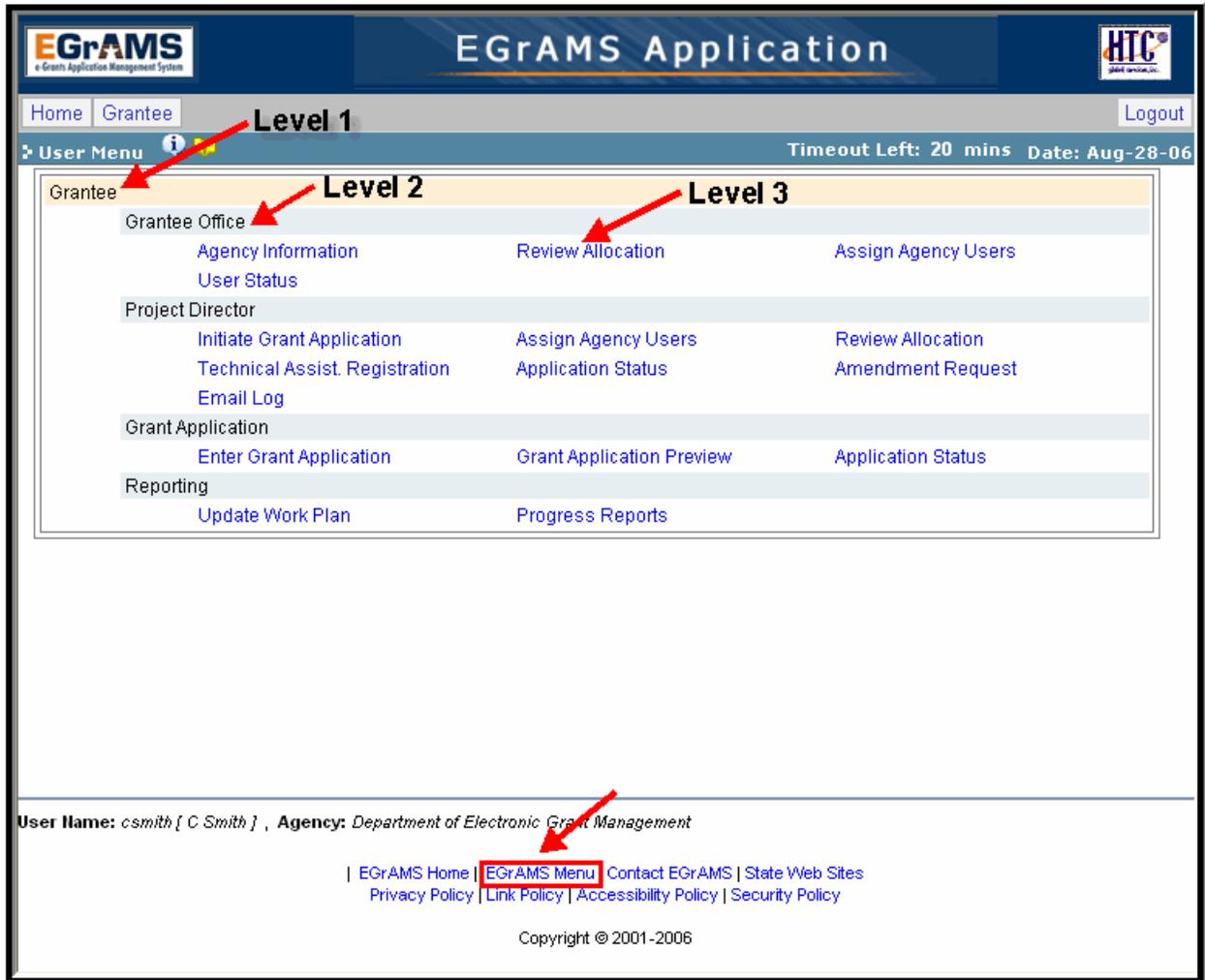
Grantor -> Master Data -> Agency List

The above screen notation means that to access the Agency List screen, you have to select the ‘Grantor’ module at the first level, ‘Master Data’ sub module at the second level, and ‘Agency List’ at the third level.

[Grantee | Local Council] -> Project Director -> Assign Users

The above notation denotes that the ‘**Assign Users**’ option is available under the Grantee, or Local Council menu, at the first level. Based on your role, you will select either Grantee or Local Council at the first menu level.

Listed below is an example of a **List** menu under the Grantor module;



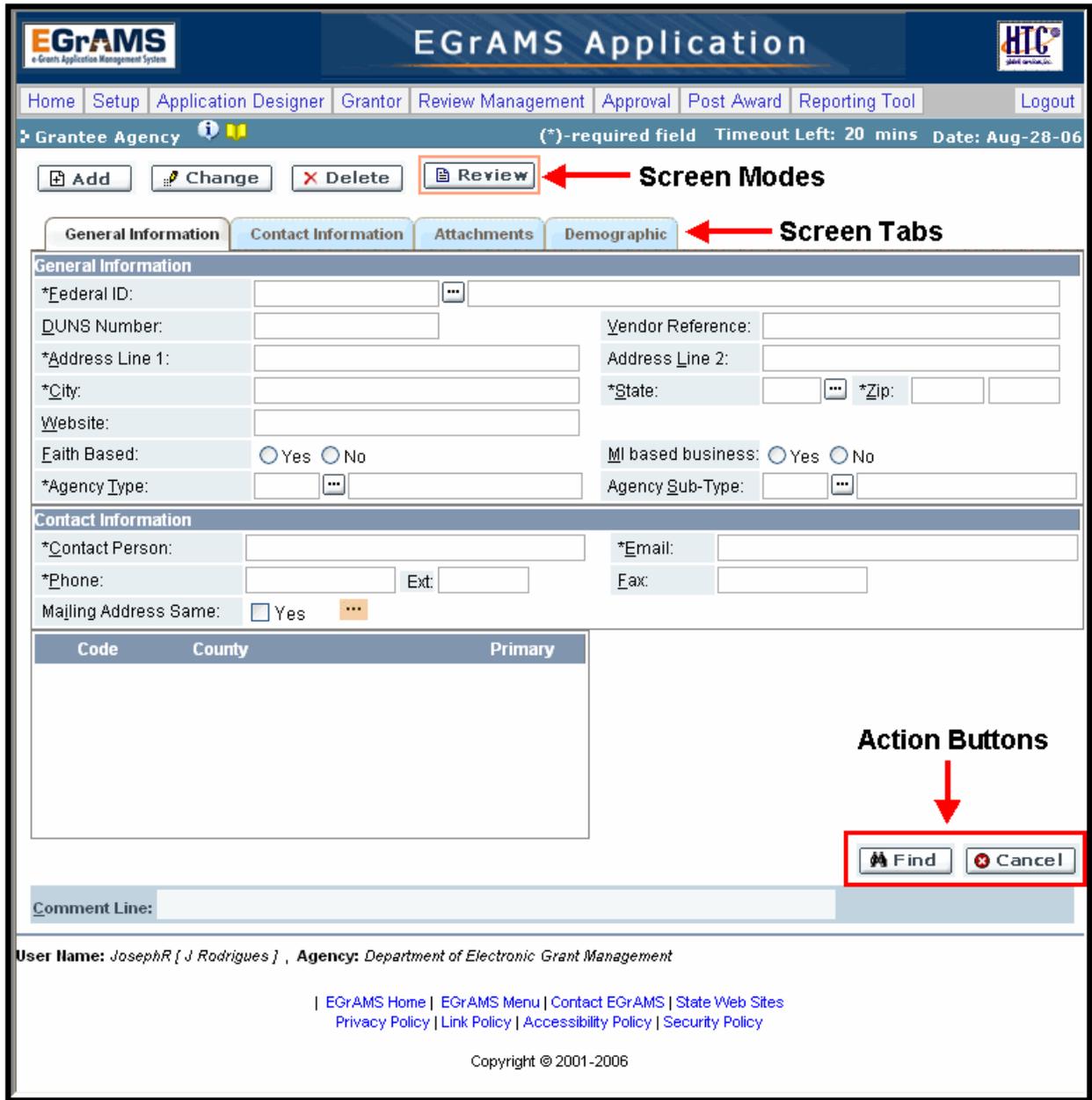
To access the **List** menu within EGrAMS click on the ‘**EGrAMS Menu**’ in the footer section. The system will display all of the available modules, sub modules and options. You may click on the desired option at the third level to access the respective screen. The above example is in reference to **Grantee -> Grantee -> Review Allocation**.

3.8.4 Note on Data Entry Screens

Depending on the information being entered, EGrAMS will use different modes of data entry. Most of the data entry screens will use one of the following modes: single record or multiple record.

1. Single Record – This mode is used when the information collected is not limited to a few fields. In a single record mode, the user performs any database operations (Add, Change, Delete or Review) on one record at a time. The user must select the screen mode first prior to entering data into the screen. When data entry is complete the user will click one of the action buttons to either save or cancel their work. The screen tabs allow for access to the different screens for data entry.

Listed below is an example of a single record entry screen:



2. Multiple Record – This mode of entry is used when the information collected is limited. This mode supports entry of information in multiple rows of similar information and is often referred to as a grid. In a multiple record mode, the user performs any database operations (Add, Change, Delete or Review) on multiple records at a time. Multiple record screens usually support two blocks.
 - a. Find Block – This section is enabled in all modes other than Add (ie. Change, Delete or Review) and is used to enter user defined search criteria.

- b. Data Entry Block – This section is enabled in Add and Change modes and is used for entering the relevant field information.

The multiple record update screen functions like the single record update screen. You must select your screen mode first and then perform your data entry. Click on one of the action buttons to save or cancel your work.

Listed below is an example of a multiple record entry mode:

The screenshot shows the EGrAMS Application interface. At the top, there is a navigation menu with options: Home, Setup, Application Designer, Grantor, Review Management, Approval, Post Award, Reporting Tool, and Logout. Below the menu, the user status is displayed as 'User Status' with a timeout of 19 minutes and the date 'Aug-28-06'. The main area contains two buttons: 'Change' and 'Review'. A red arrow points to the 'Review' button, labeled 'Screen Mode'. Below the buttons is a search section titled 'Please Enter Your Search Criteria and Click Find'. It includes fields for 'User Login', 'Role', and a 'Status' dropdown menu set to 'All'. A red arrow points to the search criteria area. Below the search section is a table with columns: User Name, Display Name, Menu Style, Role, and Active. The table lists several users, including 'ahepfer', 'AnilP', 'aredrick', 'awiseley', 'bduvermay', 'bking', 'ChrisK', 'cplettenberg', 'csmith', 'cspence', and 'ctrent'. A red arrow points to the 'Dynamic' menu style in the 'Menu Style' column. Below the table is a 'Data Entry Block' section with three buttons: 'Find', 'OK', and 'Cancel'. A red box highlights these buttons, and a red arrow points to them, labeled 'Action Buttons'.

3.8.5 Data Entry Mode

All maintenance data entry screens support Add, Change, Delete and Review modes. Some screens may support additional modes and functionality of the respective mode is described in the appropriate screen documentation. Listed below is the generic mode functionality for data entry to be supported by the different maintenance screens.

Mode	Description
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Mode	Description
Add	<p>This mode displays a blank screen and allows the user to enter a new record in the application. This is the default mode for all data entry screens.</p> <p>Note: In a grid data entry screen, the application supports entry of multiple new records in one cycle.</p>
Change	<p>This mode allows the user to Edit an existing row in the database. On selection of this mode, the application displays a blank screen to enable the user to enter the selection criteria to select the desired row to be changed. After the selected information has been displayed, the user may change the required fields.</p> <p>Note: In a grid data entry screen, the application supports changes to multiple records.</p>
Delete	<p>This mode allows the user to Delete an existing row in the database. On selection of this mode, the application displays a blank screen to enable the user to enter the selection criteria to select the desired row to be deleted. After the selected information has been displayed, the user may delete the displayed row. Prior to deletion, the application will ensure that the appropriate delete criteria has been met, if applicable.</p> <p>Note: In a grid data entry screen, the application supports delete of multiple records by marking the desired records to be deleted.</p>
Review	<p>This mode allows the user to Review existing rows in the database. On selection of this mode, the application displays a blank screen to enable the user to enter the selection criteria to select the desired rows to be reviewed. (Wild cards are supported). After display of the selected rows, the user may browse through the selected set.</p>

3.8.6 Screen Options

The Find, OK and Cancel options are used extensively throughout the application. Listed below is the generic option functionality to be supported by the various screens:

Option	Description
Find	<p>This option is available in the Review mode. After entering the selection criteria, you must click the Find button to select the applicable data set.</p>

Option	Description
OK	<p>In the Add mode of a data entry screen, this option saves a complete transaction to the database.</p> <p>In the Change mode of a data entry screen, this option saves the changed transaction to the database.</p> <p>In the Delete mode of a data entry screen, this option deletes the transaction from the database.</p> <p>In the lookup window, this option returns the required information of the highlighted row to the calling program.</p> <p>In an error dialog, this option acts as an acknowledgement from the user.</p>
Cancel	<p>In a Data Entry screen, if changes are made and not saved, the application will prompt the user with the following message “Save Changes to <appropriate text>?”. The options provided are “OK” and “Cancel”. Based on the response to the options the following actions need to be taken.</p> <p>“OK” – Save record, Close screen and return to Calling Menu</p> <p>“Cancel” – Resume Editing</p> <p>In a Lookup Window, this option cancels the search, closes the corresponding window, and returns to the calling screen with an appropriate Cancel indicator.</p>

3.8.7 Important Miscellaneous Information

As with any system, there are always a few items worth noting that will make your user experience productive and worthwhile. Listed below are some quick tips to keep in mind while using the EGrAMS application:

- Never use the back button in your web browser. This will cause you to be booted out of the application and any work you may have performed will be lost.
- Pay attention to the timeout display, located in the upper right hand corner of header. The timeout feature will close your session after 20 minutes of inactivity. The system will deliver a 2 minute warning message to alert you of the impending timeout. If you do not save your work prior to the timeout feature activating, you will lose any work you have entered and have to re-enter your data.
- Use the ‘**Tab**’ key or the mouse to navigate across fields in the system.
- Always logout of the application after you complete your work.

Displayed below is an example of the header bar with notations:



3.9 Documentation Roadmap

Since more than one role may perform the same function within EGrAMS, the user manual is documented by functionality and not roles. These sections describe what is required to be done by a specific role. Please refer to the applicable documentation as required.

If you are a grantee or a designated local council, you must do the following:

- Register your agency (if your agency information has not been registered in EGrAMS)
- Create an EGrAMS login (if your user profile information has not been registered in EGrAMS)
- Review current grants to determine the grant categories and grant programs your agency plans to submit a grant application
- Submit a Grantee Office request (if you are designated as a grantee office role by your agency for the specified grant program)
- After your request has been approved for a grantee office role, you may perform the various project director tasks.
- Grant Application Management
- Submit Progress Reports
- Review of Grant Applications (only for designated local councils)

The first portion of this user manual has focused on the general navigation of EGrAMS. The next section will concentrate on accessing and using EGrAMS.