End-to-End e-Grants Solution

January 18, 2023

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- ❖ **EGrAMS is a web based application**
- ❖ **Easy to use with help features**
- ❖ **Automates the program life cycle**
- ❖ **No additional software required to run**
- ❖ **Supports industry standard W3C browsers (Microsoft Edge, Firefox, Chrome, Safari)**
- ❖ **EGrAMS uses a consistent user interface**

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❖ How to start EGrAMS?

✓ Open your browser window

✓ Type in the URL (https://egrams-mi.com/leo)

Header – Browser controls, Application logo; constant for all screens

Menu – Lists available options

Body – Based on the option selected

Footer – Links; constant for all screens

❖ **Before using the application, it is important to:**

1. **Notations and Controls**

2. **Search and Review Grant Opportunities**

3. **Register your Agency**

4. **Create User Profile**

5. **Logging into the system**

6. **Accessing Menus and Options**

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❖ **Comments and Help**

- ✓ **All screens have a comment line at the bottom of the screen, when applicable**
- ✓ **Most fields display a brief description of what data is to be entered in the respective field**
- ✓ **All screen have a Information icon and yellow book screen help and/or documentation, when applicable**
- ✓ **All fields support field lookups, calendar lookups or dropdowns, if applicable (where applicable)**
- ✓ **Field Lookups support**
  - • **User defined Search criteria on code and description**
  - • **Wild cards – prefix, suffix & in between**
  - • **Sorting by Code or Description in Ascending & Descending order**
  - • **Wild card character is '%'**

❖ **Error Reporting**

- ✓ **All screen validations are done online and errors displayed as**
  - • **Information Messages**
  - • **Confirmation Messages**

❖ **Optional & Mandatory Input**

- ✓ **All fields prefixed by '*' are mandatory and cannot be left blank**

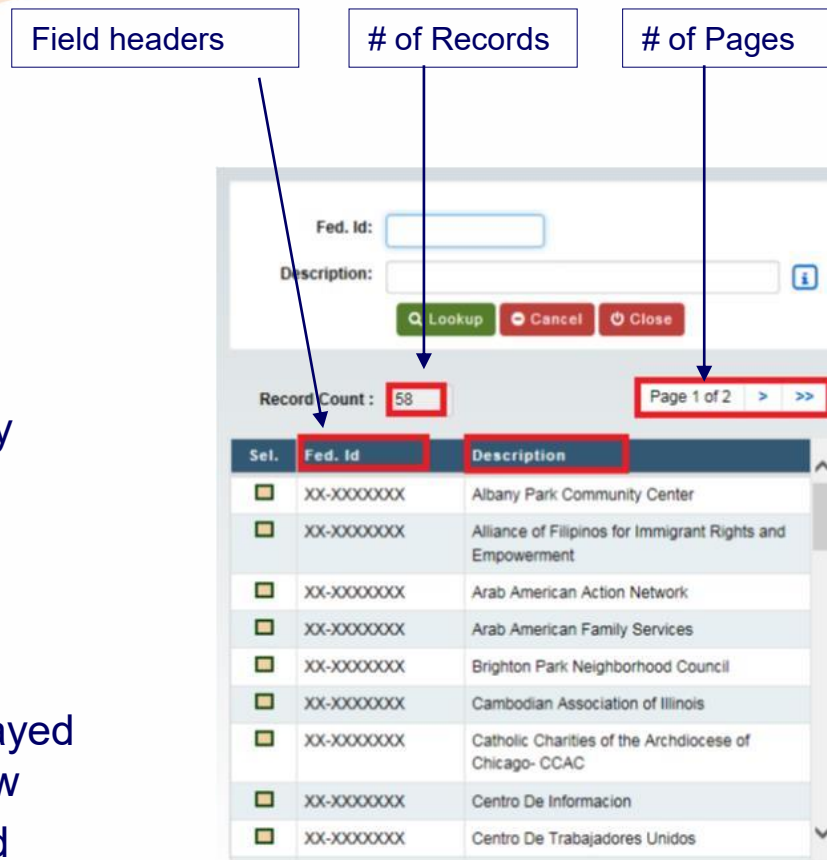**'*' Mandatory field**

Field Lookup

Dropdown

Action buttons

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❖ **Field Lookups enable users to select the appropriate value from a list of available choices**

Field headers   # of Records   # of Pages

• **Invoking a Lookup**

  ✓ Click on the field lookup icon

  ✓ Based on the field, the system displays all values

  ✓ The displayed set is sorted in Ascending order of description, by default

  ✓ Click on Field Headers to change Sort order of respective field

• **Selecting the desired value**

  ✓ Moving the mouse over the displayed rows, highlights the respective row

  ✓ Click on   to select the desired record

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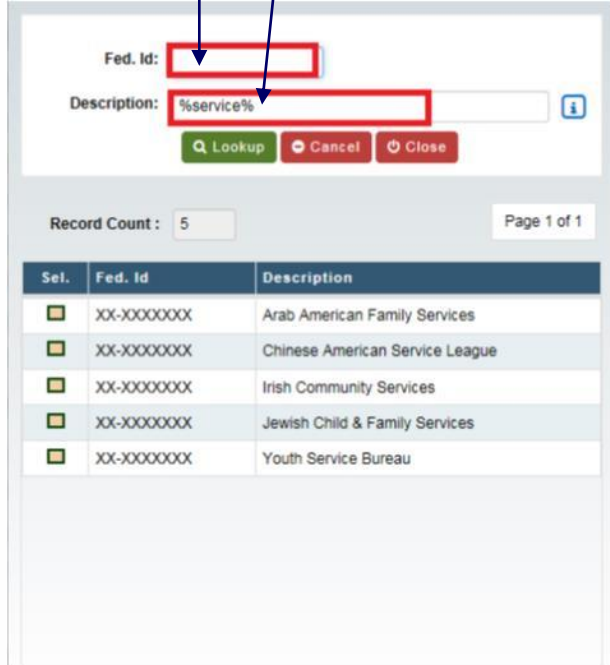- **Entering Search Criteria**

  - ✓ Enter desired criteria in the 'Search Fields' (use '%' as a wildcard)

  - ✓ Click on 'Lookup' to search the records based on entered criteria

  - ✓ Click on 'Cancel' to blank out entered search criteria

  - ✓ Click on 'Close' to return to parent screen without selecting a value

- **Selecting the desired value**

  - ✓ Moving the mouse over the displayed rows, highlights the respective row

  - ✓ Click on [✓] to select the desired record

❖ *The above search criteria specifies that the name should have the characters with 'service' in the description*

Search Fields

| Fed. Id: | |
| Description: | %service% |

Q Lookup   Cancel   Close

Record Count : 5   Page 1 of 1

Sel.	Fed. Id	Description
☐	XX-XXXXXXX	Arab American Family Services
☐	XX-XXXXXXX	Chinese American Service League
☐	XX-XXXXXXX	Irish Community Services
☐	XX-XXXXXXX	Jewish Child & Family Services
☐	XX-XXXXXXX	Youth Service Bureau

❖ **Multi Value Lookups enable users to select the appropriate value(s) from a list of available choices. This option is extremely useful when a user has to select multiple values. Eg. County information**

- **Invoking the lookup**
  - ✓ Same as described in previous slides

- **Search Criteria**
  - ✓ Same as described in previous slides

- **Selecting the desired value**
  - ✓ Click on the ☐ checkbox to mark the required value(s)
  - ✓ Click on **⊘ OK** to select the desired record(s)

❖ **Calendar Lookups enable users to select the appropriate date value across month, year, etc. as required**
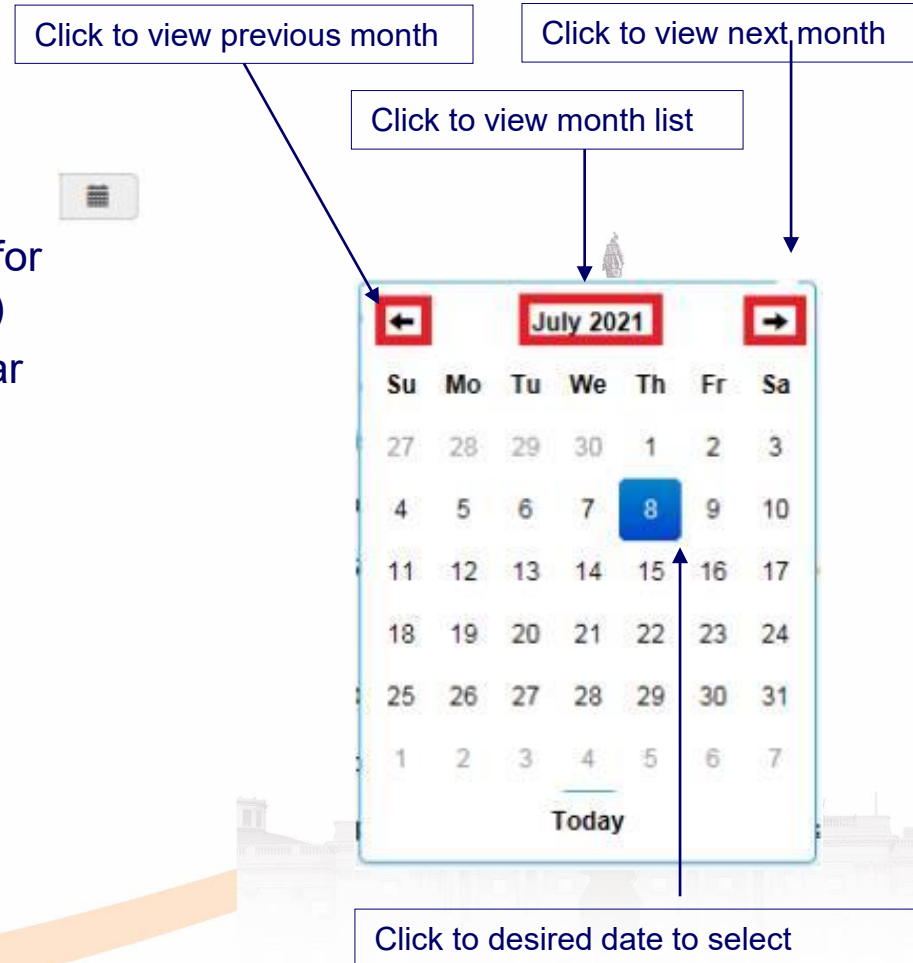
- **Invoking a Calendar Lookup**
  - ✓ Click on the calendar lookup icon
  - ✓ The system displays the calendar for the current date (day, month, year)
  - ✓ Navigate to the desired month, year based on the ← and → controls

- **Selecting the desired date**
  - ✓ Click on the date to select the respective date

- **Viewing month list**
  - ✓ Click on the Month / Year in the header

Click to view previous month

Click to view next month

Click to view month list

Click to desired date to select

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- **Selecting the desired month**
  - ✓ The system displays the list of months
  - ✓ Navigate to the desired year based on the ← and → controls
  - ✓ Click on the month to select the desired month

- **Viewing Year list**
  - ✓ The system displays the list of years
  - ✓ Navigate to the desired year based on the ← and → controls
  - ✓ Click on the year to select the desired year
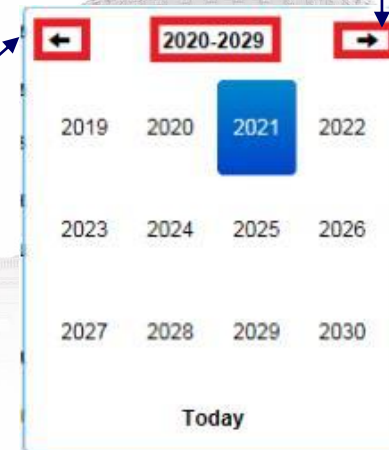
Click to view previous year

Click to view next year

Click to view year list

Click to view next year block

Click to view previous year block

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❖ **Dropdowns are used when the choice of values available is limited**

- **Invoking a Dropdown**
  - ✓ Click on the dropdown icon [Not Applicable ▼] to view a list of available values
  - ✓ The system displays a list of available values

    Required
    Optional
    Not Applicable

- **Selecting the desired value**
  - ✓ Click on the displayed value to select the respective choice
  - ✓ In addition, the user may use the up and down arrow keys to view the available choice of values
  - ✓ You may type the first character of the desired value

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❖ **All field level validations are done online and appropriate errors are displayed by the system.**

- **Information Message**

  ✓ Displays a popup window with the appropriate error or warning message

  ✓ Click on 'OK' to acknowledge the message

- **Confirmation Message**

  ✓ Displays a popup window with the appropriate error or warning message

  ✓ Provides the user a choice to confirm or cancel a certain action

  ✓ Click on 'Yes' to confirm

  ✓ Click on 'No' to cancel the action

Program : Information   ✕

ⓘ Records were successfully updated

                                                    ✓ OK

Program : Confirm

❓ This will Save all the information for the Grant Program. Do you want to continue?

                                        ✓ Yes   ⊗ No

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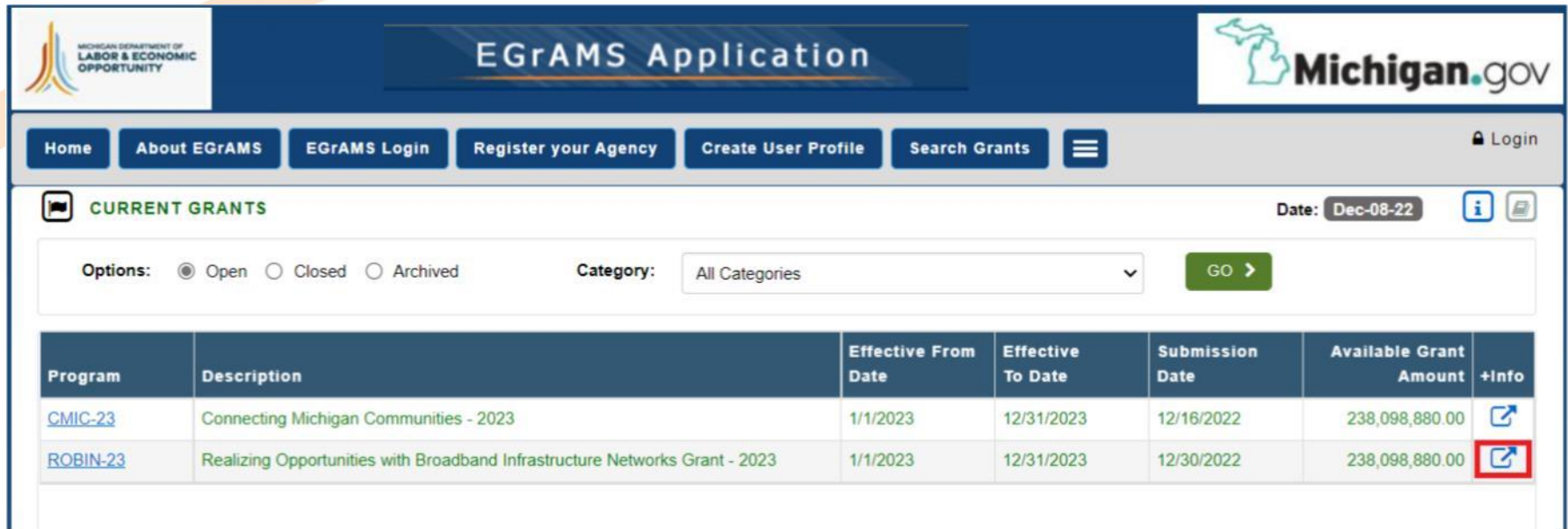
❖ Prior to starting the application process, applicants can view Program details
❖ View important information related to
- Submission Dates and Contacts
- Eligibility, Funding information, Match Requirements
- Documentation

- **To View Grant Opportunities, click**
  - ✓ **Home → Current Grants**
  - ✓ **System will display a list of Programs available**

❖ System displays a list of Programs available for the selected Category

❖ Click on the desired Program link or 'Info' icon to view additional information

❖ **System displays selected Program details under 4 tabs**
  ▪ General
  ▪ Additional Information
  ▪ Technical Assistance
  ▪ User Documents

Program Overview

Timeline & Funding info

Program contacts

❖ Clicking the 'Additional Information' tab displays information as shown below

Funding sources

Organization Type eligibility

Match & Other information

❖ Clicking the 'Tech Assistance' tab displays information as shown below

VIEW SYNOPSIS

Grant Category: High-Speed Internet   [View PDF] [Close]

Grant Program: Realizing Opportunities with Broadband Infrastructure Networks Grant - 2023

| General | Additional Information | Tech Assistance | User Documents |

Technical Assistance Session (Optional)   ← Funding sources

Sess	Type	Venue	City	Date	From	To	Online Appl	Map
1	Technical Assistance	Online Webinar		01/09/23	01:30 PM	02:30 PM	Yes 🔗	🖼

Click to view details

Technical Assistance session details

ONLINE ACCESS INFORMATION   ×

Url:
Call-in Number: (248) 509-0316
Passcode: 77465022#

[Close]

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❖ Clicking the 'Documents' tab displays list of documents as shown below
❖ Click on the desired document to view the respective document details

❖ If your agency is not already registered in EGrAMS, you need to register your agency in EGrAMS
❖ You need to register your agency in EGrAMS only once

- **To Register your Agency, click**
  - ✓ **Home → Register your Agency**
  - ✓ **System will display the agency registration screen**
  - ✓ **Check if your agency is registered**
  - ✓ **If not registered, enter your agency information**
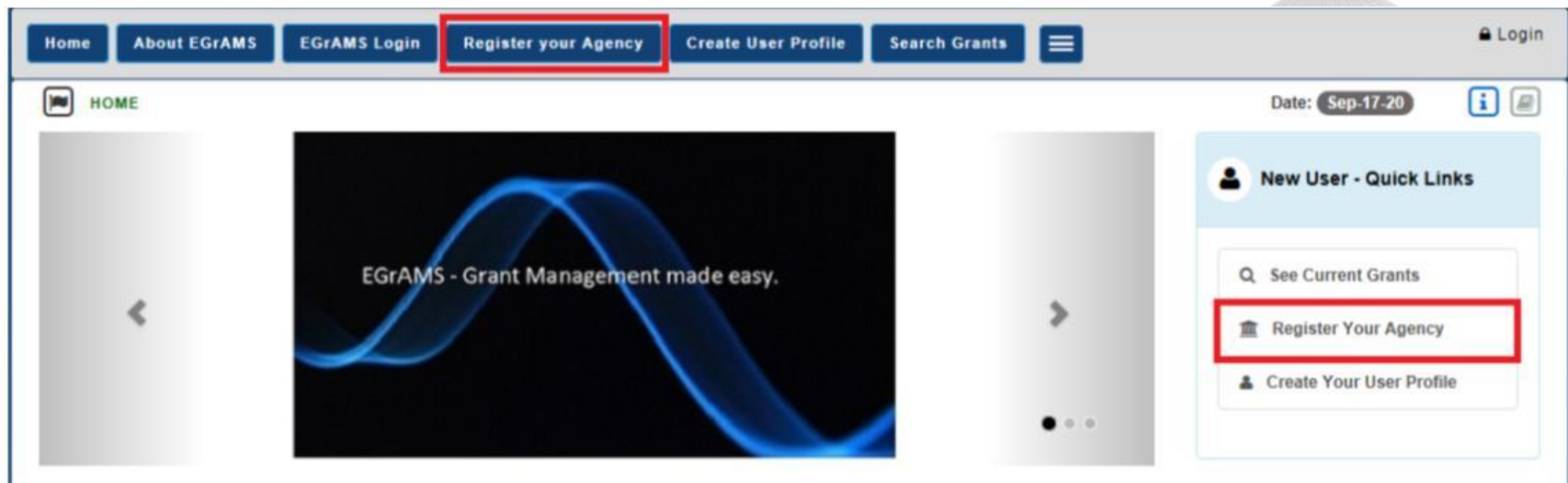
❖ System will display the agency registration screen

Click icon to check if you agency is registered

❖ System will display the available agencies
❖ Enter 'Search' criteria to search your agency

✓ Enter part of your agency name prefixed and suffixed with '%'
✓ Click on 'Lookup'
✓ If your agency name is displayed, you need not register your agency profile again

Click lookup to select Agency Type

- ✓ **Enter your agency information**
  - • Make sure that you enter all information that has "*"
  - • Click on lookup icon to select your agency type
- ✓ **Click on 'Contacts' tab to enter contact information**

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✓ **Enter your agency contact information**

✓ **Mailing Address block is enabled only if 'Mailing Address Same' is unchecked**

✓ **Click on "Others" to enter county information**

County information

Mark Primary County

System maintained information

Click 'OK' to save

✓ **Enter your county(ies) information**
  • More than one county may be selected
  • At least one county must be marked as 'Primary'
✓ **'Contract Type Information' is system maintained**
✓ **Click on "OK" to save and complete your agency registration**

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❖If you do not have a user profile in EGrAMS, you need to create your user profile
❖You need to create your user profile in EGrAMS only once

- **To Create you User profile, click**
  - ✓ **Home → Create User Profile**
  - ✓ **System will display the 'Create User Profile' screen**
  - ✓ **Enter your information**

Select your parent agency

Select your EGrAMS Role

Enter your information
- Enter all information that has "*"
- Password should meet set up rules (min 9 characters, at least 1 alpha, 1 numeric and 1 special character)
- Select your role as '**Grantee**' (if applicant) or as applicable
- Select your parent agency

Enter your information

- Select your work designation/title
- Select your security question(s)

✓ **Click on "OK" to create your user profile**

✓ **Once you create your user profile, you can log into the system**

❖ **Your user account is created with an 'Inactive' status**
❖ **Once your User Profile is activated, you will receive and email**

- **After Creation of Your User Profile**
  - ✓ Your user account is created in EGrAMS with an "Inactive" status
  - ✓ Once your user profile has been activated, you will receive a "Confirmation" email and can begin using EGrAMS

Email Information

From: LEOSupport@michigan.gov

Sent: Dec-08-22 12:06:23 PM

To: john.doe@anyhsi.net

Subject: User Activation for John Doe in EGrAMS

Message:

Dear John Doe,
Any HSI Program Eligible Agency

Your user profile with user name jdoe has been activated for the NFWF EGrAMS site. You may log into the EGrAMS application to review your projects and access the various functions based on your role.

You may change your user information after logging in to EGrAMS. Please note that Role and Parent Agency can only be changed by the System Administrator.

Technical assistance regarding your user profile should be directed to LEOSupport@michigan.gov.

EGrAMS Administrator

View PDF   Send Email   Close

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❖ **To login into EGrAMS, select Home ->EGrAMS Login**

✓ The system will display the login screen as shown

✓ **Enter your user name and password**

✓ **Click on "OK" to login**

✓ **If your credentials are correct**

• System displays EGrAMS Welcome page

• System will display menus as applicable to your role

• Select the desired option

✓ **If your credentials are incorrect**

• System displays error message

• Acknowledge the message

- **After successful Login**
  - ✓ EGrAMS Welcome Page is displayed
  - ✓ You are greeted by EGrAMS using your "Display Name"
    - System will display menus as applicable to your role
    - Select the desired option
  - ✓ In the footer section, system displays
    - User Name
    - Parent Agency
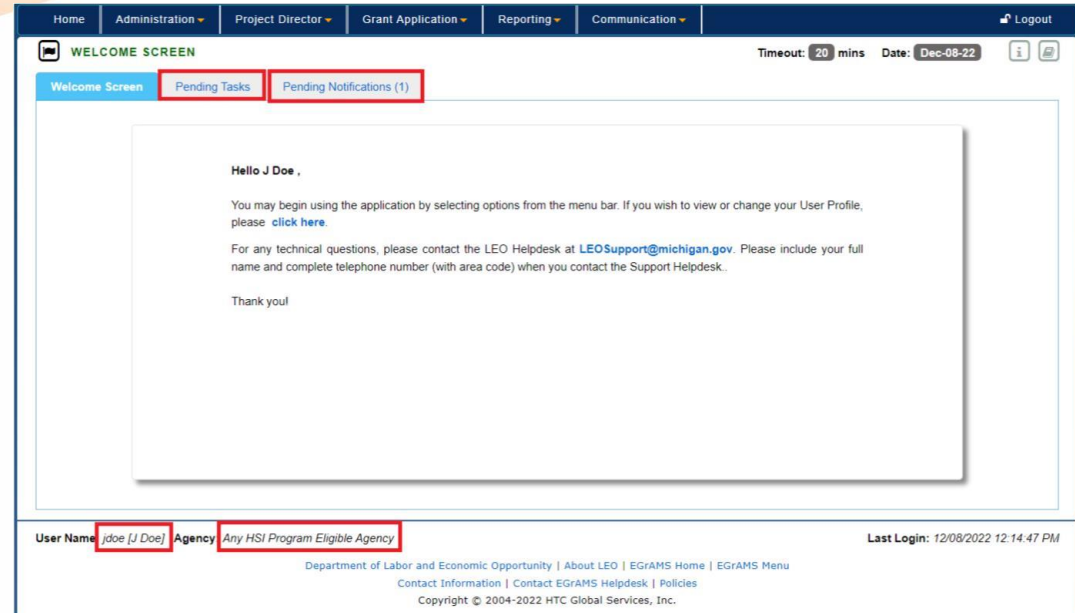
❖ **Menus allow the user to select the desired options within EGrAMS**

❖ **A user role determines the access options available to a user**

❖ **EGrAMS supports three type of menus – Dynamic, Dropdown & List**

• **Dynamic**
  ✓ Place your mouse over the desired module at Level 1
  ✓ Place your mouse over the desired sub module at Level 2
  ✓ Click on option at Level 3
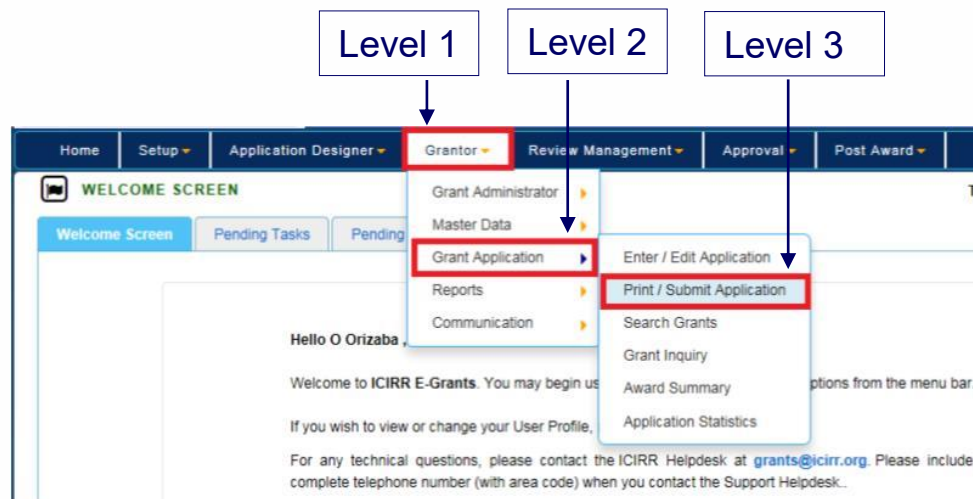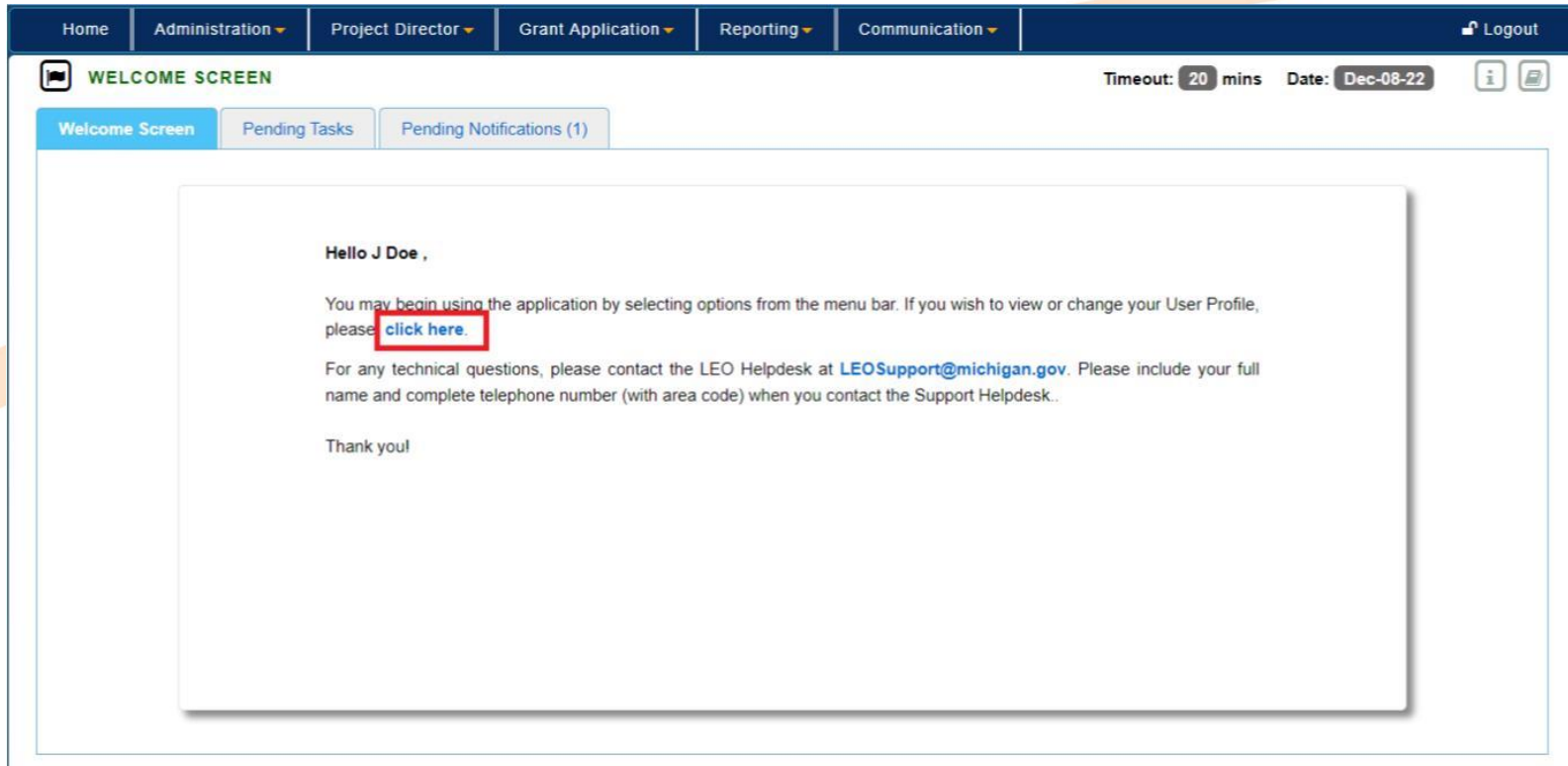
✓ **To update / edit user profile information, click 'click here' link on Welcome page**

- ✓ **System displays your user profile information**
- ✓ **Edit required information**
- ✓ **Click on 'OK' to save information**

❖ **You cannot change**
  - • **User Name or Password**
  - • **Role**
  - • **Parent Agency**

❖ **Administration -> Agency Information**
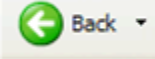
✓ **System displays the Fed Id and Agency Name of the user**

✓ **Select 'Edit' mode, Click on 'Find'**

✓ **Edit the desired information**
  • You cannot change Federal Identification Number (FEIN)

✓ **Click on 'OK' to save your changed information**

• **A word of Caution**

✓ Never use the button

✓ Pay attention to the timeout counter

✓ display. Save your work if it gets to 4 minutes

• The system gives you a warning message 2 minutes prior to timeout

✓ Click on 'Yes' to restart the timer

✓ Always Logout after you complete your work

Click on 'Yes' to restart timer

Back button

Timeout Warning

Logout button

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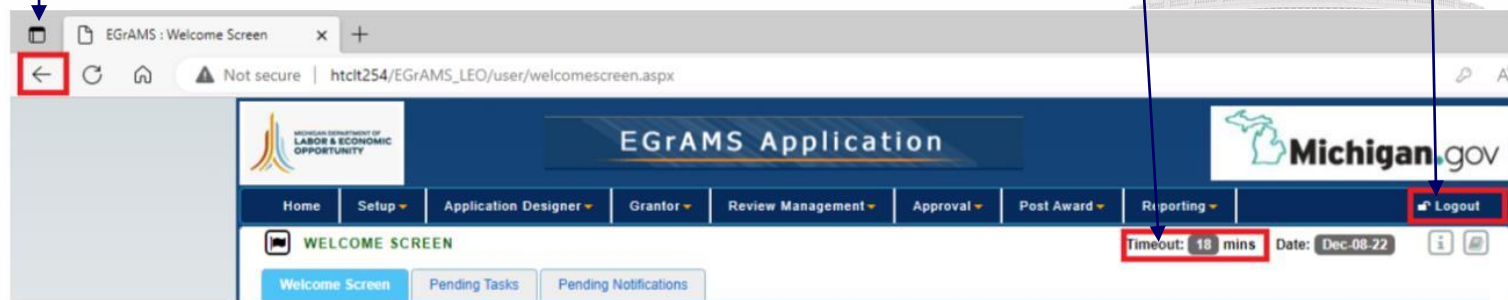
❖ **You may use the Forgot Password option, if**
- ✓ **Your password has expired**
- ✓ **The system warns you that your password will expire in 'x' number of days**
- ✓ **You want to change your password but cannot remember your old password**

- *To change your EGrAMS password*

- **Home → EGrAMS Login, Click on "Forgot Password"**
  - ✓ The system will display the Forgot Password screen
  - ✓ After you enter your user name, the system will display
    - Your security questions that you registered with your user profile
    - Enter the answer to your security questions
    - Enter your new password and retype new password to confirm
    - Click on 'OK' to reset and save your new password
  - ✓ If your user name or password are incorrect, the system will display
    - An error information message
    - Acknowledge the message
    - Try again OR call your System Administrator to reset your password

LOGIN

* User Name: [   ]

* Password: [   ]

🔒 LOG IN

Change your password   Forgot your password?

Note: Password is case sensitive. If you are using shared computer, please make sure to close your window after usage.

FORGOT PASSWORD

* User Name:	jdoe
Security Question 1:	What are the last 4 digits of your Social Security number?
* Security Answer 1:	1234
Security Question 2:	
Security Answer 2:	
* New Password:	••••••••
* Retype Password:	••••••••

✔ OK   ✖ Cancel

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❖ ***You may change your password, if***
- ✓ **Your password has expired**
- ✓ **The system warns you that your password will expire in '5' number of days**
- ✓ **Your choice, passwords cannot be changed again for a minimum of '3' days**

- ***To change your EGrAMS password***

- **Home → EGrAMS Login, Click on "Change Password"**

  - ✓ The system will display the change password screen
    - Enter your user name and old password
    - Enter your new password and retype new password to confirm
    - Click on 'OK' to save your new password
  - ✓ If your user name or password are incorrect, the system will display
    - An error information message
    - Acknowledge the message
    - Try again OR you may use the "Forgot Password' option

LOGIN

* User Name:

* Password:

🔒 LOG IN

Change your password   Forgot your password?

Note: Password is case sensitive. If you are using shared computer, please make sure to close your window after usage.

CHANGE PASSWORD

* User Name: jdoe

* Old Password: ••••••••

* New Password: ••••••••

* Retype New Password: ••••••••

✔ OK   ⊘ Cancel

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EGrAMS
End-to-End e-Grants Solution

✓ **Overview of EGrAMS**

✓ **Hardware & Software Requirements**

✓ **How to Invoke EGrAMS**

✓ **Comments & Help**

- **Comment line, screen information, screen documentation**

- **Field Lookups, Calendar Lookups, Dropdowns**

- **Information & Confirmation Messages**

✓ **Accessing EGrAMS and User Profile**

- **Search and Review Grant Opportunities**

- **Create Agency Profile**

- **Create User Profile**

✓ **Logging into the System**

✓ **Menus & Options**

✓ **Change User Profile**

✓ **Change Agency Profile**

✓ **Forgot Password / Change Password**

Questions?

1. **Create an Agency profile**
2. **Create one or more User profile(s) for the created Grantee**
   - **Set Role as 'Grantee'**
   - **Select Parent Agency as the Grantee (based on the agency you belong to)**