Grant Solutions 3.12 release notes.

06/02/2010

Contents

GRANT NOTES 3

Grantor Staff Navigation of Grant Notes Feature 3

- TO ADD A GRANT NOTE 3
- CANCEL BUTTON 5
- TO ADD AN ATTACHMENT TO A GRANT NOTE 5
- TO VIEW GRANT NOTES 6
- EDIT GRANT NOTES 6
- SORT GRANT NOTES 7
- VIEW ATTACHMENT(S) TO GRANT NOTE 7
- DELETE GRANT NOTE 7

Applicant Staff Navigation of Application Notes Feature 8

- The Application Notes Add screen is displayed. 9
- TO ADD AN APPLICATION NOTE 9
- TO ADD AN ATTACHMENT TO AN APPLICATION NOTE 10
- TO VIEW APPLICATION NOTES 10
- VIEW ATTACHMENT TO APPLICATION NOTE 10

Grantee Staff Navigation of Grant Notes Module 10

- The Grant Notes screen is displayed. 12
- ADD A GRANT NOTE 12
- ADD AN ATTACHMENT TO GRANT NOTE 14
- SORT GRANT NOTES 15

GRANT NOTES

Grant Notes are project specific, and will include all Application/Grant Notes from the application stage through award stage and will include all budget periods. Older Grant Notes may only be viewed.

Grantor Staff Navigation of Grant Notes Feature

Grantor staff will access the Grant Note feature from My Grants List by clicking on the Grant Notes link. Clicking the Cancel button will return the user to My Grants List.

NOTE TYPES

The Note Types for Grantor staff are:

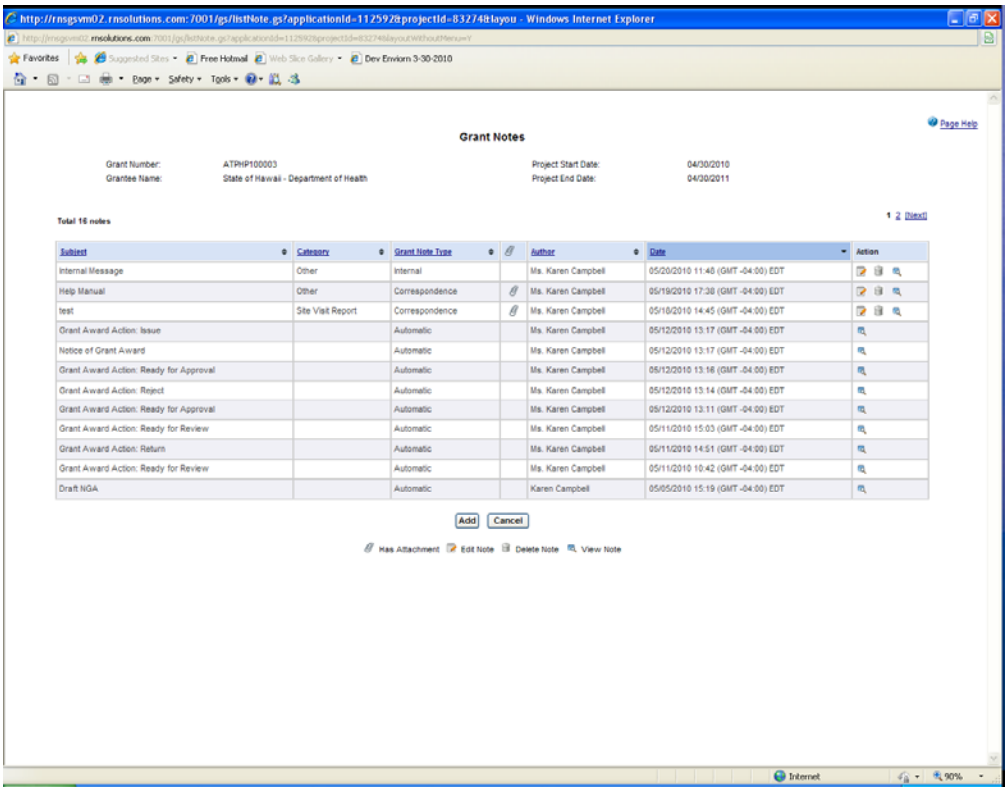
Correspondence –Viewable by all authorized users.

Internal – Viewable only by Federal staff

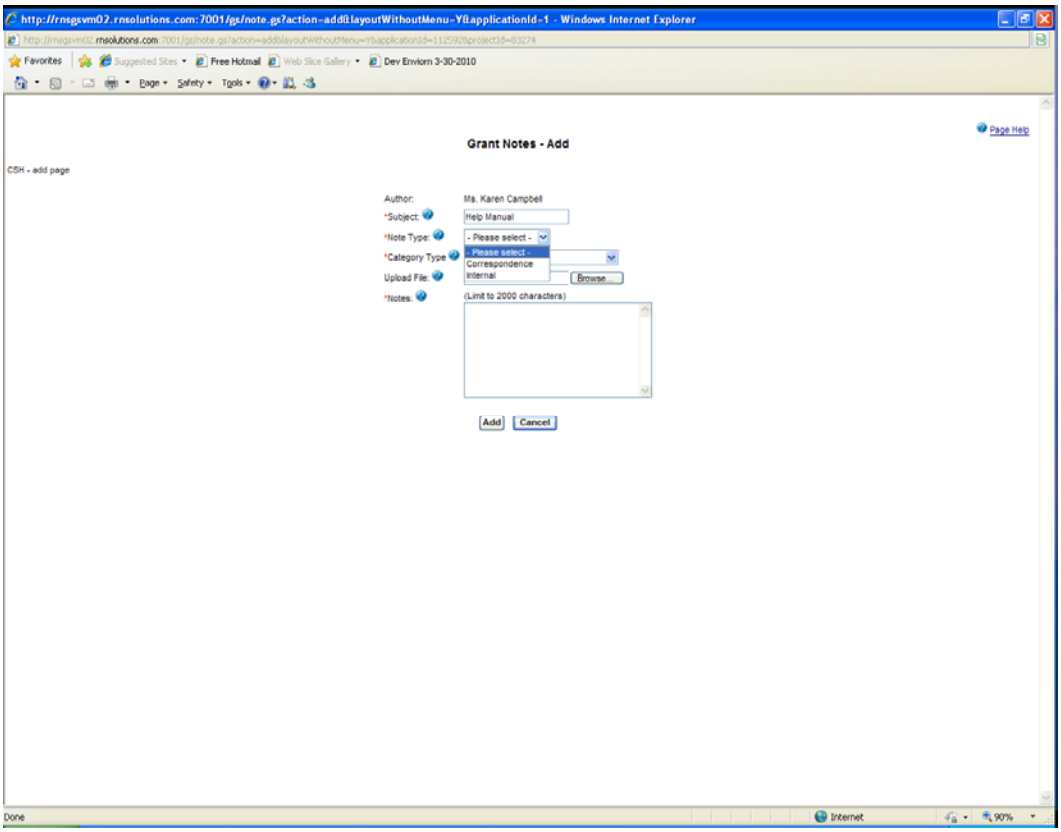
Automatic – System generated. These notes cannot be deleted or edited.

- TO ADD A GRANT NOTE

From My Grants List the user will click on Grant Notes. The Grants Note screen will be displayed.



Click on the Add button to add a Grant Note. The Grant Notes-Add screen will be displayed.



Required fields are:

Subject:

Note Type: Available for selection from the drop down menu

Correspondence

Internal

Category Type: Category Types available for selection from the drop down menu

Site Visit Report

Grantee Marketing Materials

Programmatic Report

Policy Request

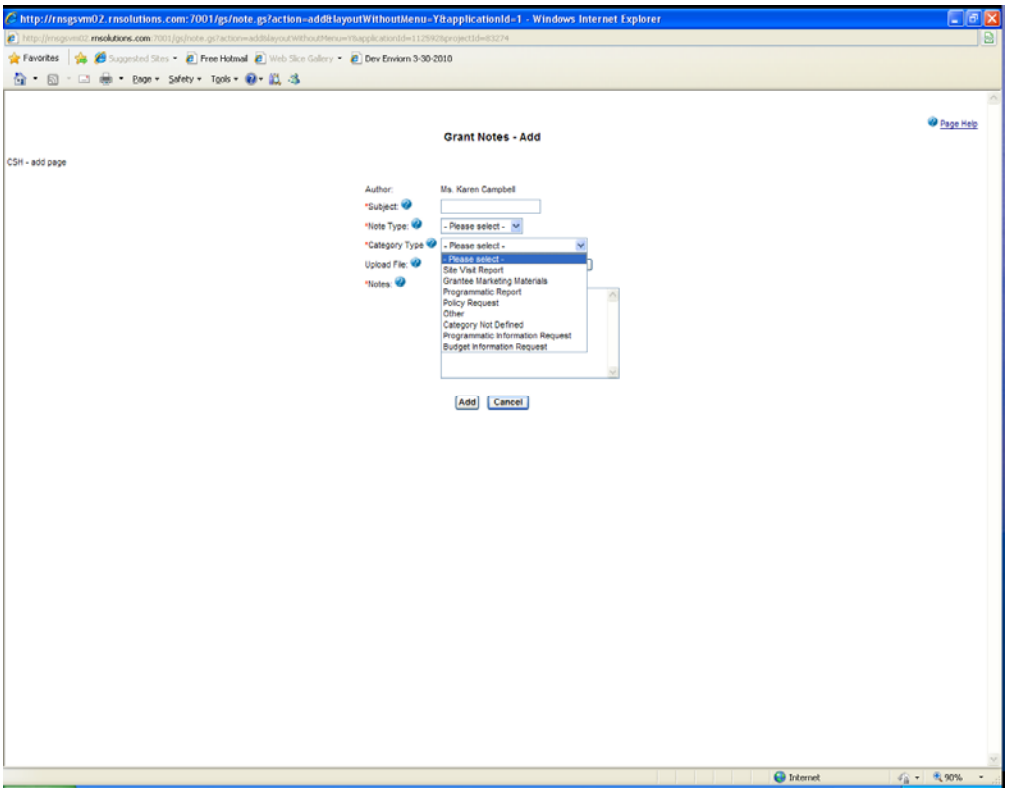
Other

Category Not Defined

Programmatic Information Request

Budget Information Request

Notes: This field is limited to entry of 2000 characters.



Click the Add button to add the Grant Note.

- ## CANCEL BUTTON

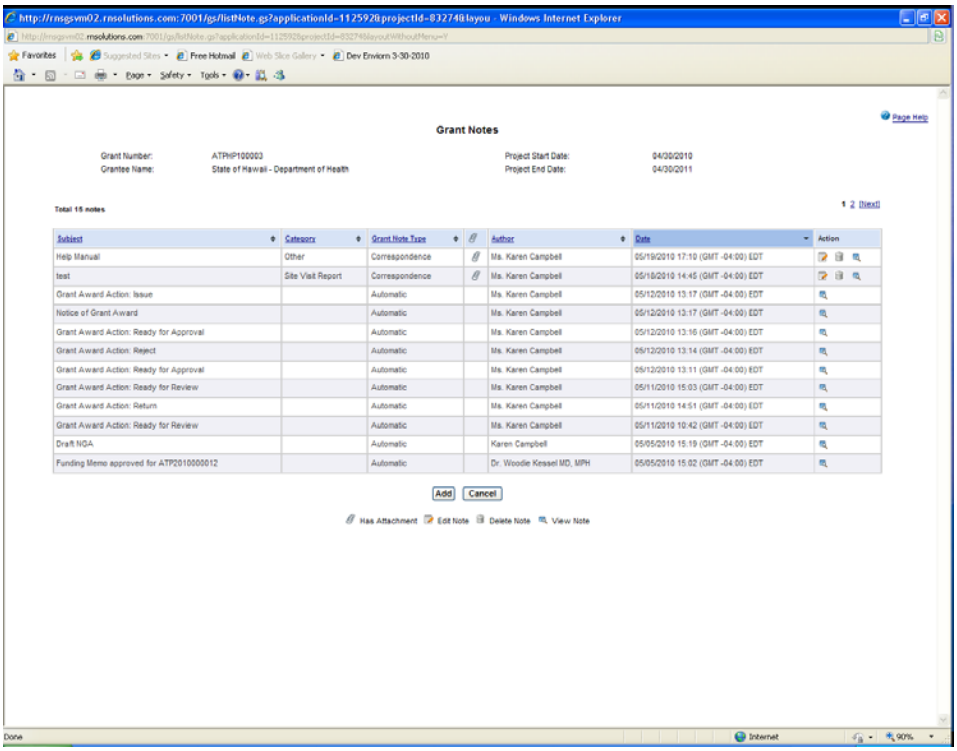
Clicking on the Cancel button will return user to previous screen.

- ## TO ADD AN ATTACHMENT TO A GRANT NOTE

To add an attachment to the Grant Note the user will click on the Browse button and select the file to attach to the Grant Note.

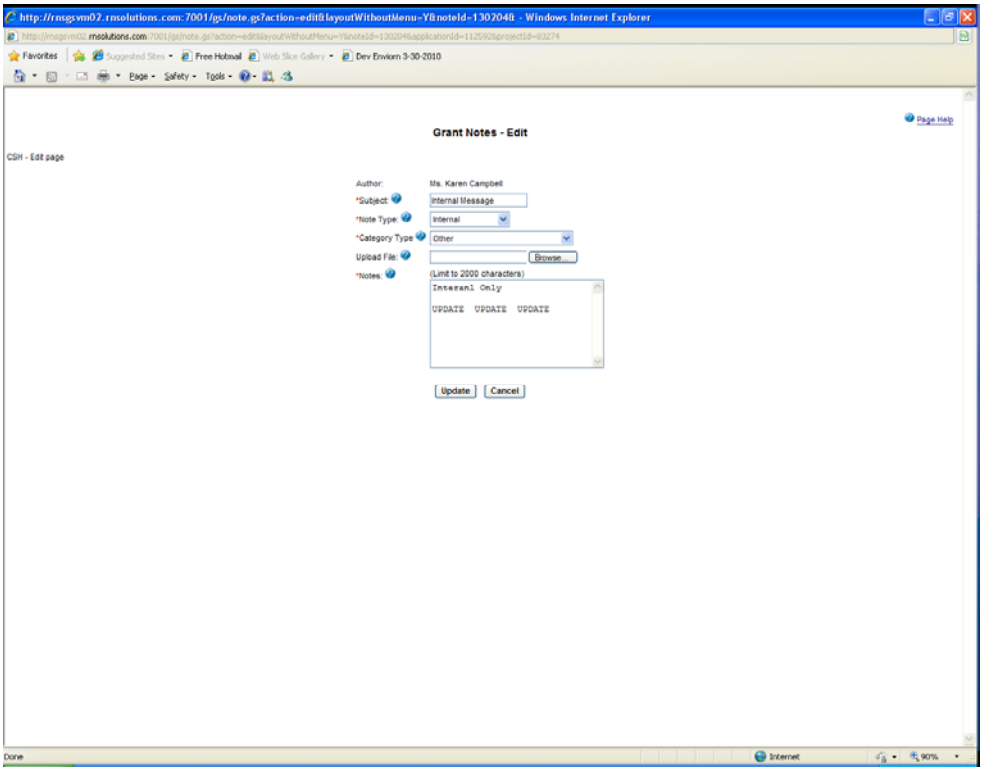
- ## TO VIEW GRANT NOTES

From My Grants List the user will click on Grant Notes.



- ## EDIT GRANT NOTES

Grant Notes are editable by clicking the Edit icon under the ACTION column. The Grant Notes Edit screen is displayed. To save the edit(s) made to the Grant Note click on the UPDATE button. Clicking on the Cancel button will return the user to the Grant Notes screen.

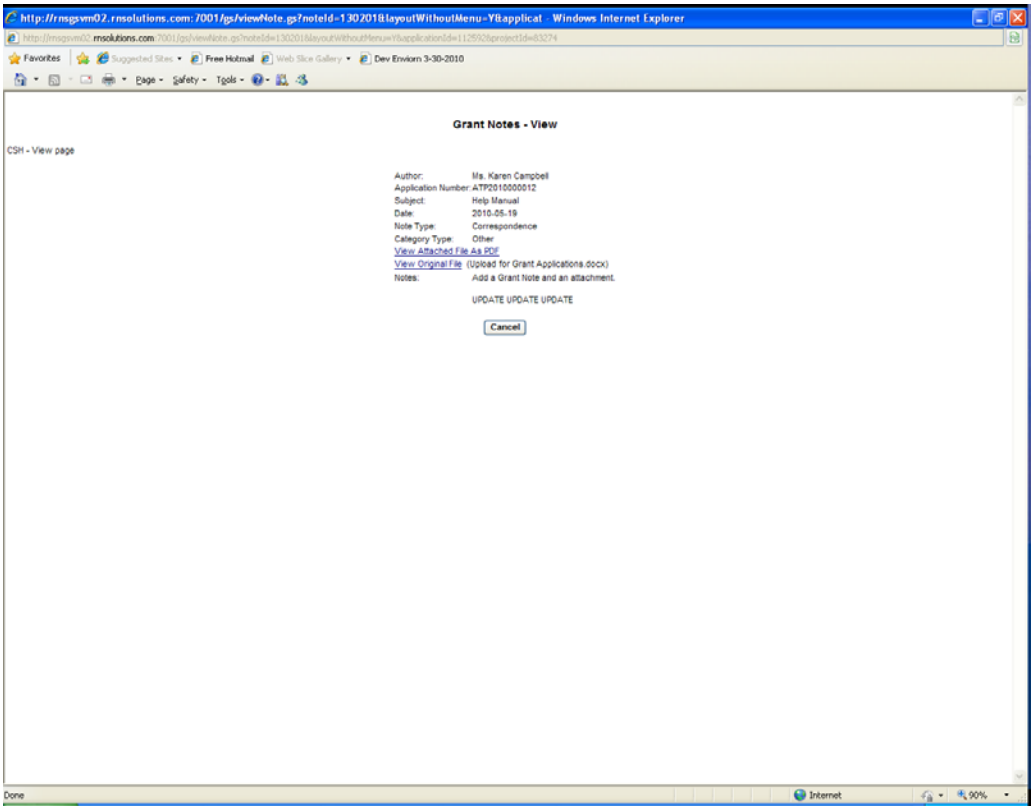


- ## SORT GRANT NOTES

Clicking on the Column Heading will sort Grant Notes.

- ## VIEW ATTACHMENT(S) TO GRANT NOTE

A Grant Note with a paperclip icon has an attachment. The attachment can be viewed by clicking on the VIEW icon in the ACTION column. The Grant Notes View screen is displayed. The user has a choice of viewing the attachment as a .PDF or as the original file. The user clicks on the Cancel button to return to the Grant Notes screen.



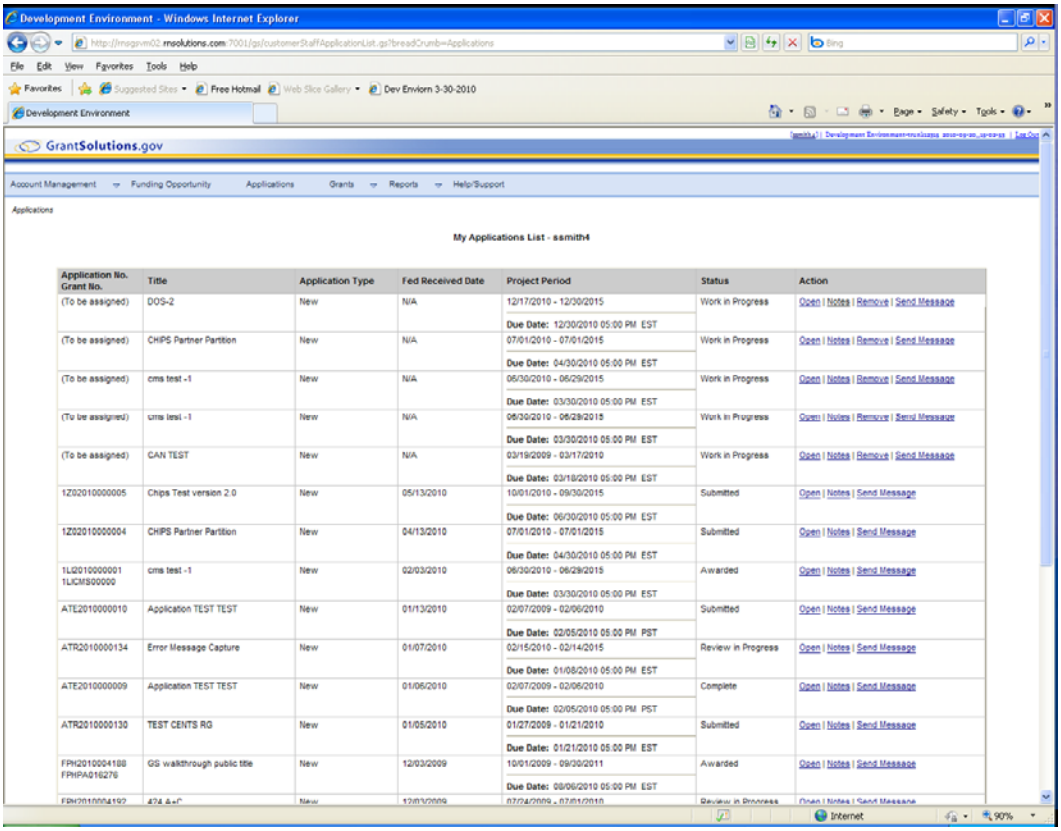
- ## DELETE GRANT NOTE

To delete a Grant Note click on the Delete Note icon in the ACTION column. System generated Grant Notes cannot be deleted.

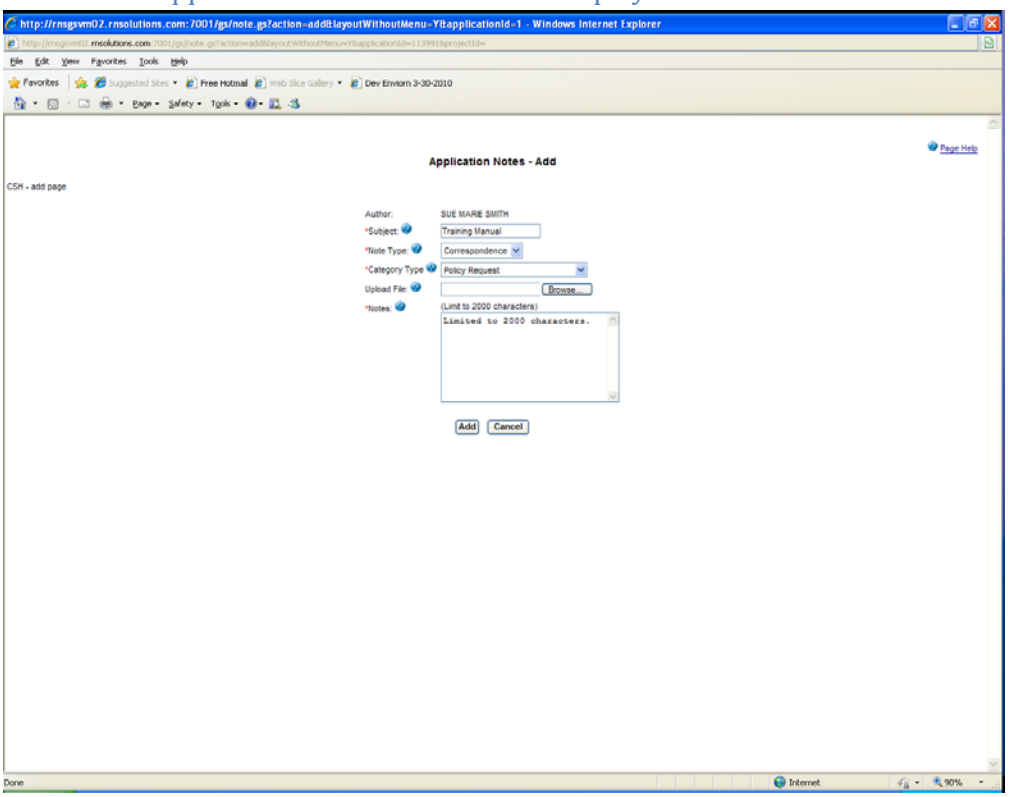
Applicant Staff Navigation of Application Notes Feature

Application/Grant Notes are project specific, and will include all Application/Grant Notes from the application stage through award and will include all budget periods.

Applicant staff will access the Application Notes feature from My Application List by clicking on Notes in the Action column.



- The Application Notes Add screen is displayed.



- TO ADD AN APPLICATION NOTE

Required fields are:

Subject:

Note Type: Correspondence

Category Type: Category Types available for selection from the drop down menu

Site Visit Report

Grantee Marketing Materials

Programmatic Report

Policy Request

Other

Category Not Defined

Programmatic Information Request

Budget Information Request

Notes: This field is limited to entry of 2000 characters.

Click the Add button to add the Applicant Note.

Cancel Button

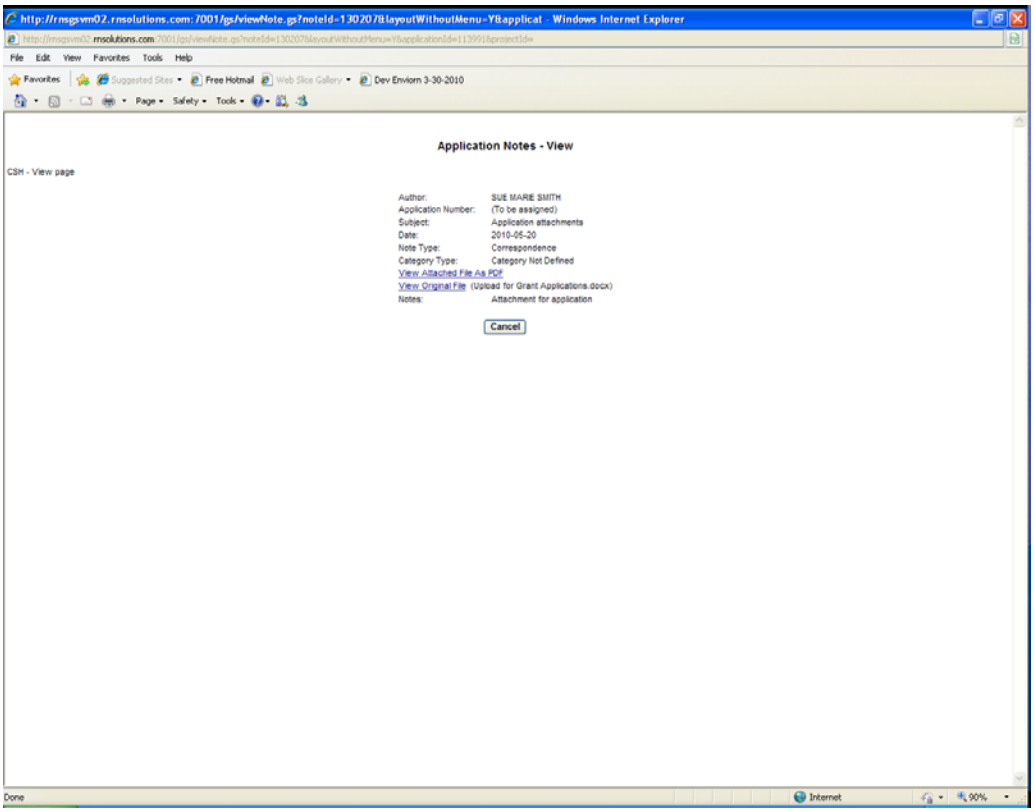
Clicking the Cancel button will return the user to My Grants List.

- TO ADD AN ATTACHMENT TO AN APPLICATION NOTE

To add an attachment to the Grant Note the user will click on the Browse button and select the file to attach to the Grant Note.

- TO VIEW APPLICATION NOTES

The user will click on the View note icon in the Action column.



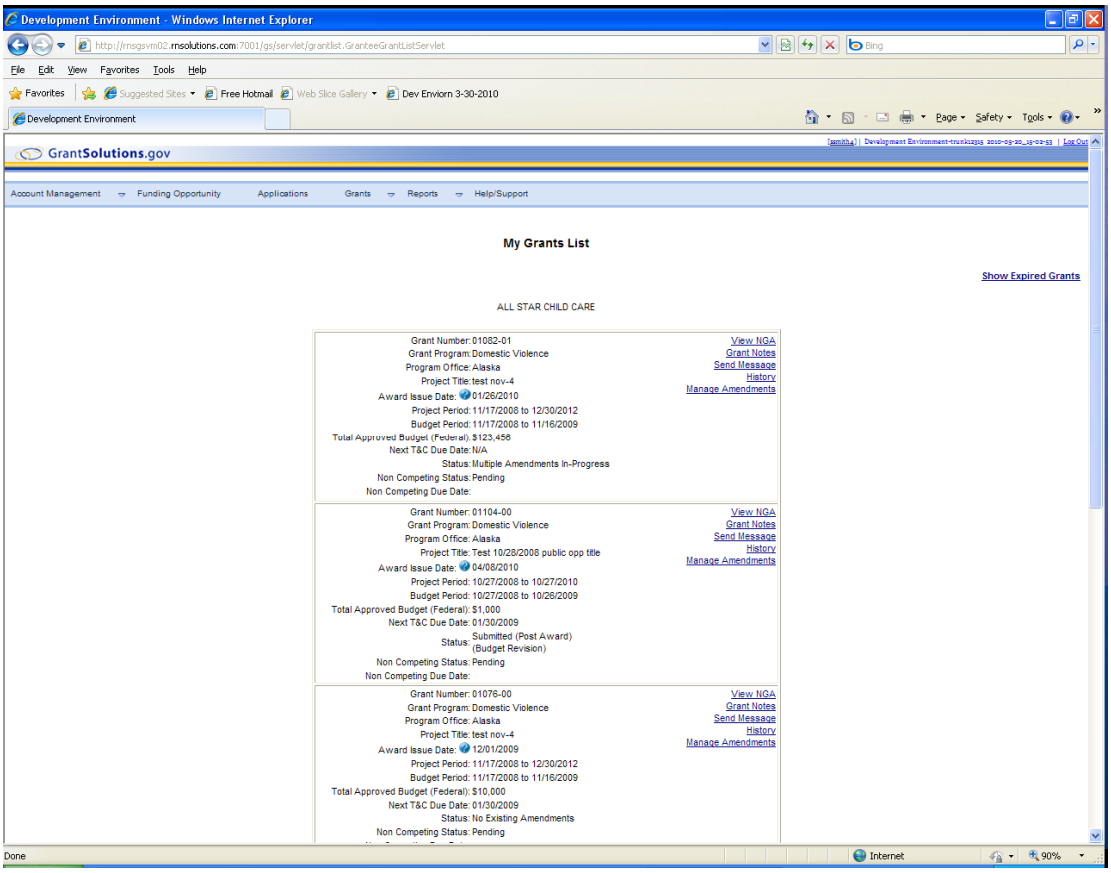
- VIEW ATTACHMENT TO APPLICATION NOTE

Click on the view Attached File as PDF link or View Original File link

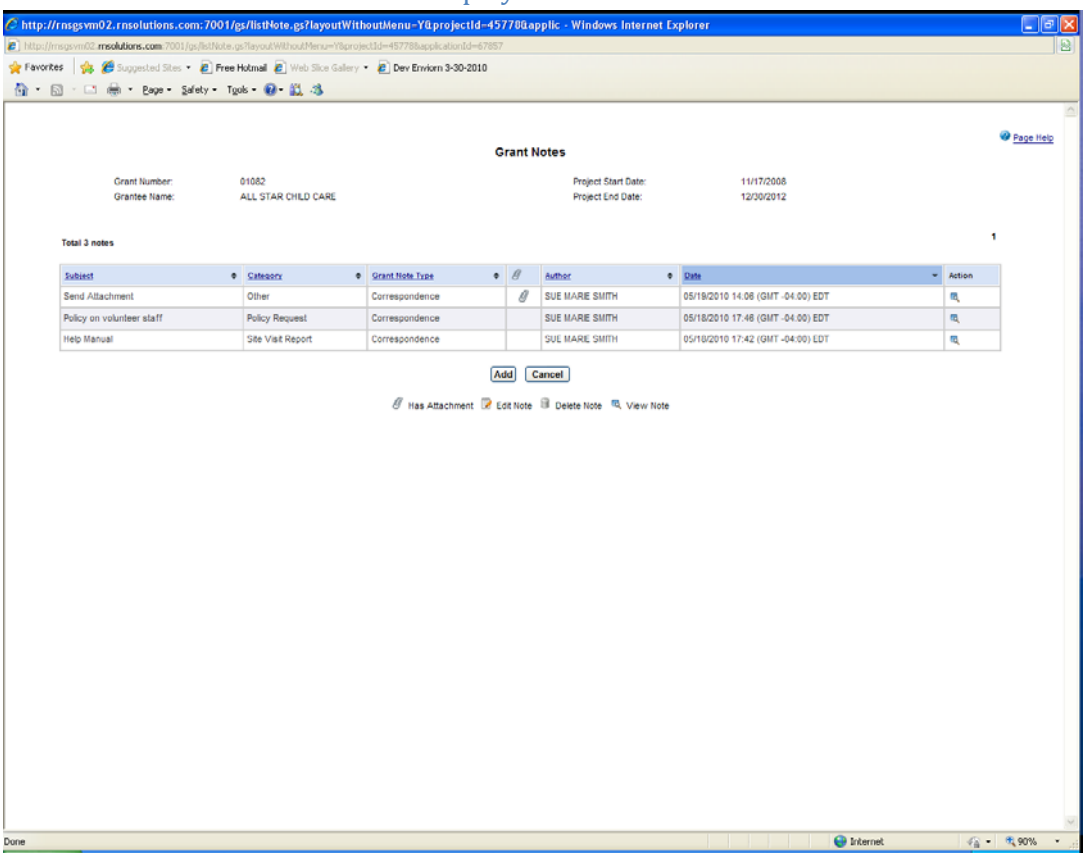
Grantee Staff Navigation of Grant Notes Module

Grant Notes are project specific, and will include all Application/Grant Notes from the application stage through award and will include all budget periods.

Grantee staff clicks on the Grant Notes link in My Grants List to access Grant Notes.

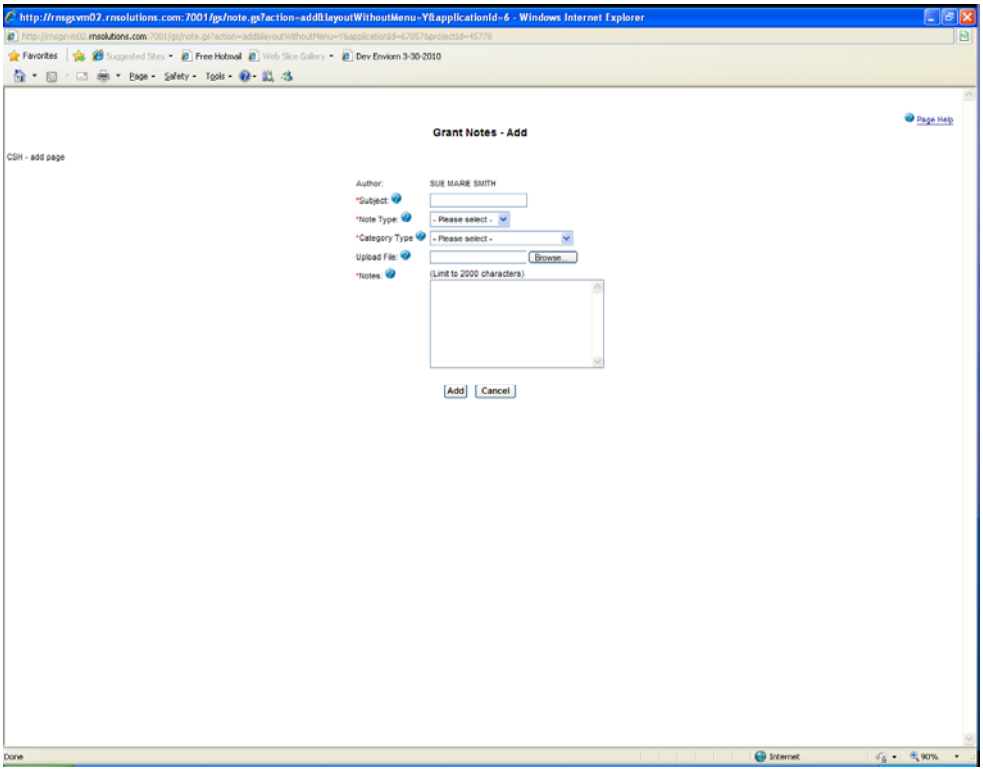


- The Grant Notes screen is displayed.



- ADD A GRANT NOTE

Click on the ADD button to add a Grant Note:



The Grant Notes – Add screen is displayed.

Required fields are:

Subject:

Note Type: Will always be "Correspondence" for Grantees)

Category Type: Category Types available for selection are

Site Visit Report

Grantee Marketing Materials

Programmatic Report

Policy Request

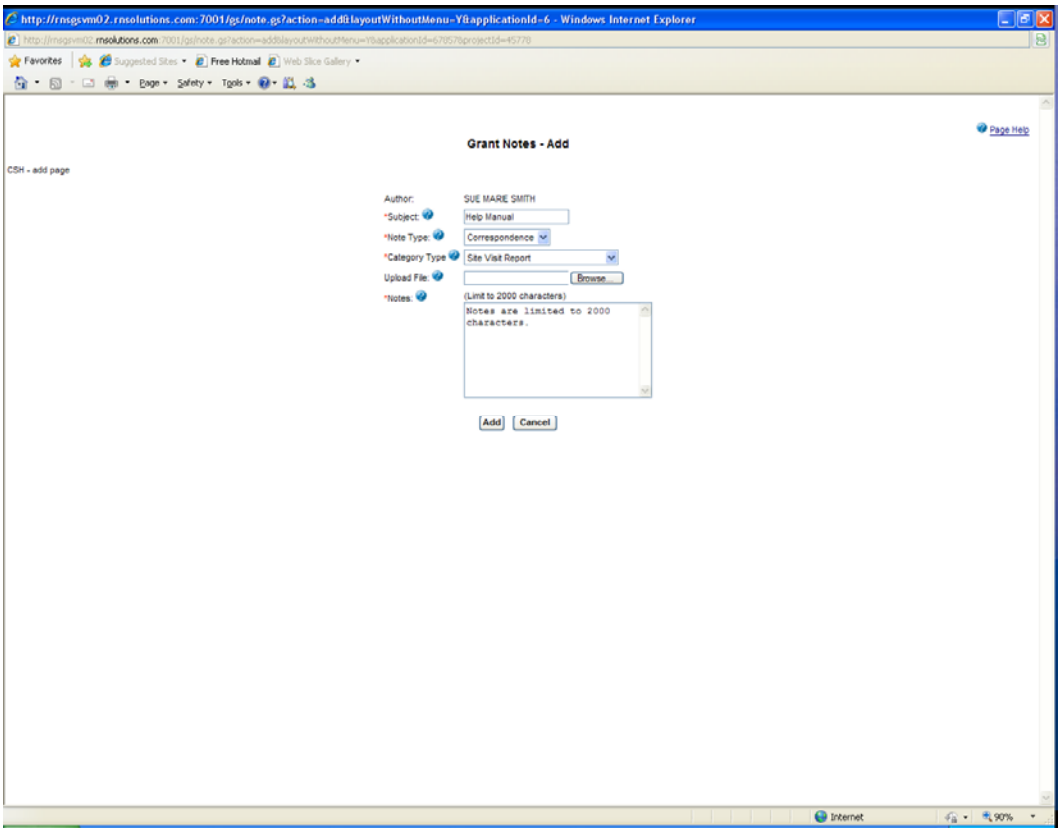
Other

Category Not Defined

Programmatic Information Request

Budget Information Request

Notes: this field is limited to entry of 2000 characters.



User may click the Cancel button to return to the Grant Notes screen.

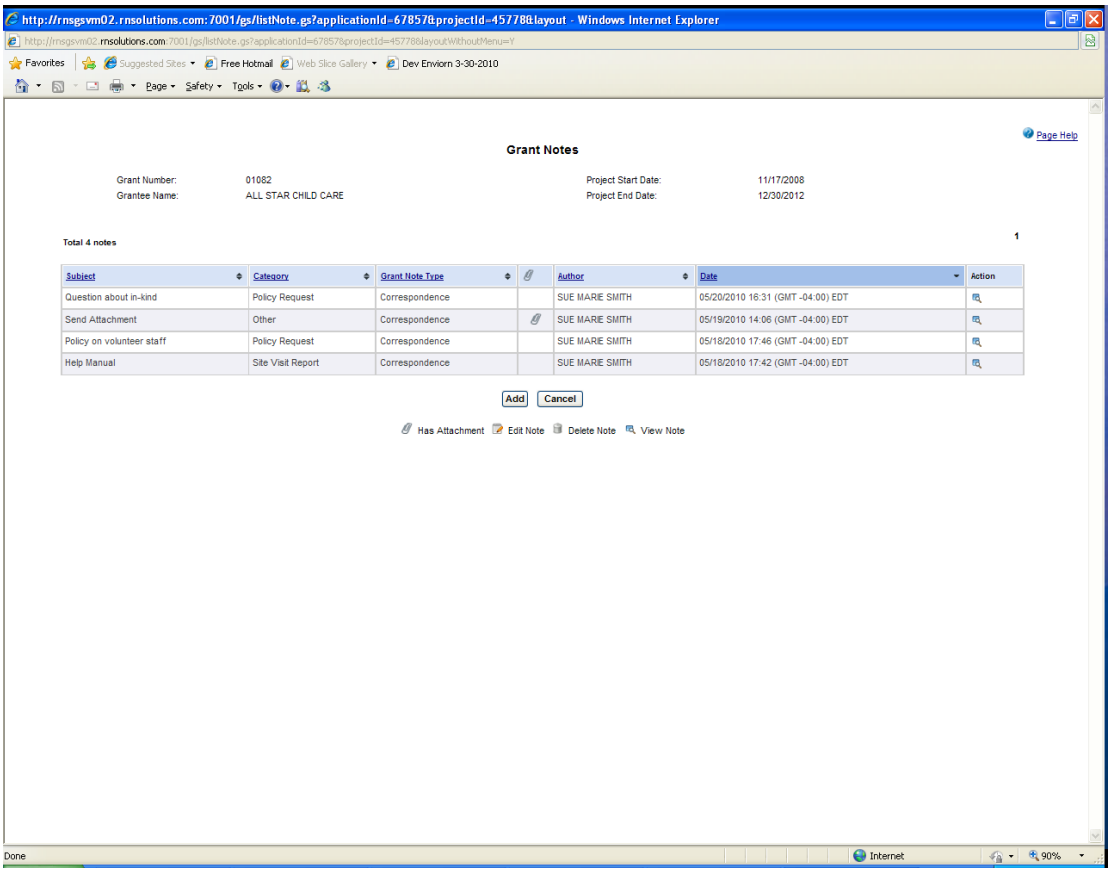
- ADD AN ATTACHMENT TO GRANT NOTE

Users may upload a file which will be attached to the Grants Notes. The user will click on Browse to upload attachment, complete all required fields, and then click on Add button.

User clicks the ADD button to add the Grant Note.

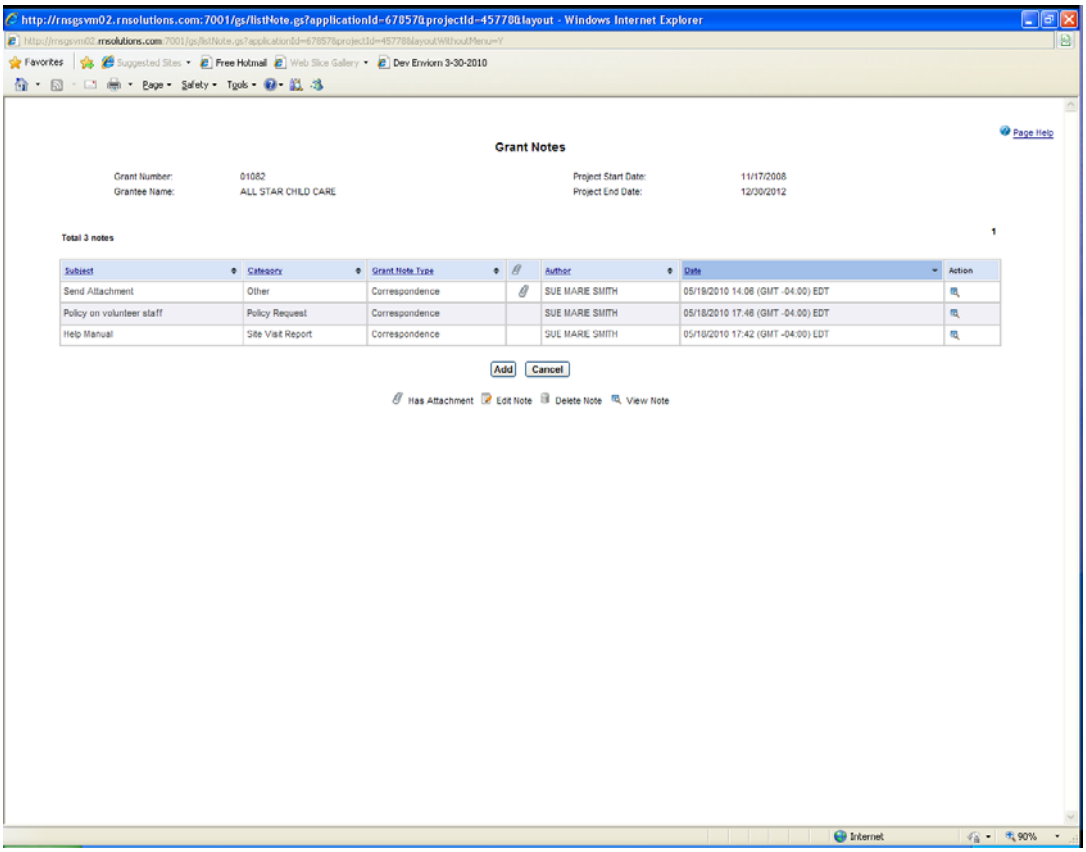
User is returned to the Grant Notes screen, which displays the Grant Note added.

The Grant Notes screen will display a paperclip icon if a Grant Note has an attachment.



- SORT GRANT NOTES

Clicking on the column Heading will sort the Grant Notes.


http://rnsgsvm02.rnsolutions.com:7001/gs/listNote.gs?applicationId=678578projectId=457788layout - Windows Internet Explorer
Favorites
Suggested Sites
Free Hotmail
Web Slice Gallery
Dev Enviorn 3-30-2010
Page
Safety
Tools
Page Help
Grant Notes
Grant Number: 01082
Grantee Name: ALL STAR CHILD CARE
Project Start Date: 11/17/2008
Project End Date: 12/30/2012
Total 3 notes
1
Subject | Category | Grant Note Type | Author | Date | Action
Send Attachment | Other | Correspondence | SUE MARIE SMITH | 05/19/2010 14:06 (GMT -04:00) EDT
Policy on volunteer staff | Policy Request | Correspondence | SUE MARIE SMITH | 05/18/2010 17:46 (GMT -04:00) EDT
Help Manual | Site Visit Report | Correspondence | SUE MARIE SMITH | 05/18/2010 17:42 (GMT -04:00) EDT
Add
Cancel
Has Attachment
Edit Note
Delete Note
View Note
Internet
90%

Reporting Status "All" has been added to Federal Financial Reporting

Development Environment - Mozilla Firefox

File Edit View History Bookmarks Tools Help

rnsolutions.com https://gsdev.rnsolutions.com/gs/ffrGrantorList.gs?breadCrumb=Grants+Management+>+Grantee+Reporting+>+Manage+FFR+Reportin

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Development Environment

Would you like to change the stored password for bgov? Change Don't Change

Your password will expire today. Please Change Now [bgov] | Development Environment-trunk12597 2010-06-02_12-01-32 | Log Out

GrantSolutions.gov

My Grants List | Funding Opportunities | Applications | Awards | Grants Management | Reports | System Management | Help/Support

Grants Management > Grantee Reporting > Manage FFR Reporting

Page Help

Manage FFR Reporting

Grantee Org Name:

DUNS:

Core Grant Number:

Grant Program: -Please Select a Grant Program, otherwise default to all-

Reporting Status: All, Due, N/A, Not Reported, Past Due

Exclude Grants Requiring No FFR Reports:

Search

Please Enter Search Criteria

Find: Next Previous Highlight all Match case

Done