



System Administrator User Manual

Version 1.1.0.0. – 13-Apr-2007

Table of Contents

Introduction	1
System Requirements	2
Security	2
GrantSolutions User Roles	2
Project Officer.....	2
Program Coordinator.....	3
Office Director	3
Grants Management Officer.....	3
Grants Management Specialist.....	3
Grants Technical Assistant.....	4
Authorizing Official.....	4
Accessing the System	5
Login Procedure.....	5
GrantSolutions Message Center	6
Inbox	6
Outbox	8
Exiting GrantSolutions.....	9
Getting Help.....	9
Audit Log	10
Performing a Search.....	10
System Administrator Tables	11
Basic Lookup Tables	11
Advanced Look-up Tables	16
Application Kit Enclosures Table	16
CAN (Common Account Number) Table	17
Enclosure Type Table	19
State Table	20
Printing a Table	23
User Information	25
Manage Person Information	25
Performing a Search.....	26
Viewing Person Information	26
Edit Person Information	26
Add an Address.....	27
Deleting the Person Information	29
Adding a Person Record	29
Creating a User Account	30
Managing User Accounts	31

Performing a Search.....	32
Creating User Groups.....	34
Performing a Search.....	34
Editing a User Group	35
Deleting an Organization	35
Adding a Role to a Group	36
Manage Organizations.....	37
Performing a Search.....	37
Editing an Organization	39
Deleting an Organization	39
Adding a New Organization.....	39
Combine/Remove an Organization	40
Grants Workload Management.....	42
Manage Service Region.....	42
Performing a Search.....	42
Editing the Service Region	43
Deleting a Service Region.....	43
Adding a Service Region	43
Manage Programs	44
Performing a Search.....	45
Edit Program	45
Manage Program Activities.....	47
Manage Program Types	47
Grant Assignment	48
Grant Assignment by Office	48
Grant Assignment by Person.....	48
Manage Program Offices.....	49
Manage Program Offices by Headquarters	49
Manage by Program Office.....	50
Manage by Program Person	51
Post Award Action Kit Management.....	52
Viewing the Action Kit.....	52
Assemble Application Kit.....	53
System Configuration.....	54
Manage Text Configuration	54
Edit Textual Modules.....	55
Form Letter Templates.....	55
Upload Template.....	56
Upload SQL	57
Hash Checking.....	58
Application Attachment Hash Validation	59
Application Note Hash Validation	59
Enclosure Attachment Hash Validation	60
Status Deadlines.....	61
FSR Offsets	61
Non-Competing Offsets	61
CLO Offsets	62
FPAR Offsets.....	63
Task Messages	63
Funding Memo.....	63
Prior Approval Memo	64
Password Management	65

EIN Management	65
Performing a Search.....	66
Adding an EIN	66
Gates Management	68
ETL Queue.....	68
ETL Log	68
Index	71

Introduction

The Office of Public Health & Science Program Offices (OPHS)/Office of Grants Management (OGM) manages all financial and business functions throughout the life of the grant from application to close-out. As the official signatory for obligating Federal grant funds, grants business management, and prior approval requests, the OGM monitors all business and financial transactions for grants compliance with Federal Regulations.

Designed to support the OPHS/OGM business process, the GrantSolutions System is a fully automated web-based J2EE compliant system. GrantSolutions can be used to capture, manage and process the entire discretionary grants management business life cycle.

As an interactive input and retrieval system, GrantSolutions allows users to perform grants management functions and maintain all information related to applications and grants. Through GrantSolutions, users can maintain applicant information, recommend and award funds, and view the status of pending applications and approvals. Users can also perform award-funding calculations, release and print awards, submit award data to external systems, and facilitate changes in data such as the recipient's address or the contact information of a grants management officer (GMO).

GrantSolutions consists of four modules:

1. Pre-Award
2. Award
3. Post Award
4. Administration

Each module provides independent functionality that can be used to manage a specific grant business process or combined the individual modules provide a complete grants management solution.

The Administration (ADMIN) subsystem provides the security and communication infrastructure for the GrantSolutions system. Designed for System Administrators, this subsystem can be used to gather user information for creation, maintenance, and monitoring of user accounts and maintains system security by providing access controls using secured usernames and passwords.

The subsystem allows the Administrator to manage user tables, look-up tables, templates, and send internal communications and self-reminders.

e-Commerce is electronic business transactions conducted over a computer network using applications that rely on the Internet.

System Requirements

The GrantSolutions System exists in a 3-tier environment using an industry-standard *e-Commerce* capable web server, a Java Application Server, and a high-performance Oracle Database. Accessing the system is available from user's workstation using one of the following internet browsers:

- Internet Explorer 5.01 higher.
- Alternatively, Netscape 4.7 or higher.

Security

The GrantSolutions system is intended for use by Grants Management and Program Staff, and our grantee business partners. OPHS staff members have access privileges based on job roles and assignment to defined "groups" within the GrantSolutions security system. Grant applicants and grantee business partners register their name and organization with GrantSolutions and receive a confidential user name and password that will provide access for online application, grant announcements, and electronic submission of post-award reports and activities.

A role is a set of privileges granted to a user based upon assigned duties and responsibilities.

GrantSolutions User Roles

A variety of access *roles* are available within the GrantSolutions System, which provide user privileges as well as protect the integrity of the data. Security is necessary to restrict access based upon a user's status and responsibilities.

GrantSolutions is customized and based upon user's system roles, which fall into three basic categories:

1. Program Staff
2. Grants Staff
3. Grantee

Project Officer

Program Official/Project Officer (PO) is the designated official responsible for the programmatic, scientific, and/or technical aspects of HHS programs. As a member of the Program Staff, the PO serves as the counterpart to the Department's Grants Management Officer and can work on multiple projects. The PO system responsibilities include:

- Setting disposition on scored applications that emerge from ORC.
- Recommending award amounts for funded applications.
- Drafting the funding memo and submitting it for further review.
- Review and initiate prior approval memos.
- Review post-award actions and non-competitive applications.

NOTE: The system may or may not treat RMHCs as POs. RMHCs are approximately equivalent to OFP's RPC (Regional Program Consultant).

Program Coordinator

Responsible for managing the PO, the Program Coordinator (PC) makes program level decisions for an entire program. As a member of the Program Staff, the PC has the access rights to perform any PO responsibilities. The PC system responsibilities include:

- Review funding memos.
- Concurring or not concurring with post-award action memos.

NOTE: Other titles associated with the PC include, Grants Coordinator and Program Grants Coordinator.

Office Director

The Program/Office Director (OD) or the Regional Program Consultant (RPC) is the individual responsible for all grants within a program area.

Grants Management Officer

The Grants Management Officer (GMO)/Grants Officer is the individual designated to serve as the HHS official responsible for the business management aspects of a particular grant(s) or cooperative agreement(s). This level of security provides access to all data elements that encompass the creation and modification of records relevant to the review, negotiation, award and administration of grants, and the interpretation of grants administration policies and provisions.

The GMO serves as the counterpart to the Business Officer of the recipient organization. Working closely with the PO, the GMO has the ability to perform any GTA or GMS functions and responsibilities. As the leader for the Grants Office, the GMO system responsibilities include:

- Creating new announcements and assigning grants staff.
- Posting and un-posting application kits.
- Assigning grants personnel for an announcement.
- Rejecting, concurring, or not concurring with funding memos.
- Generating transaction files regarding submissions to PMS.
- Confirming applications as ineligible.
- Signing ineligible letters.
- Issuing NGAs.
- Approving post-award actions and prior approval memos.

Grants Management Specialist

Reporting to the GMO, the Grants Management Specialist (GMS) oversees the business and other non-programmatic aspects of one or more grants and/or cooperative agreements. These activities include, but are not limited to, evaluating grant applications for administrative content and compliance with regulations and guidelines, negotiating grants, providing consultation and technical assistance to recipients, post-award administration and closing out grants.

Working closely with the GMO, the GMS has the ability to perform any GTA function and responsibilities. GMS system responsibilities include:

- Starting (but not posting) application kits.

- Creating application kit templates.
- Performing the Grants Business Review.
- Editing budget on NGA and submitting it for GMO review.
- Creating prior approval memos.
- Performing Eligibility Review.

Grants Technical Assistant

Primarily responsible for administrative tasks, the Grants Technical Assistant (GTA) has the lowest access role level of the Grants Staff. Working closely with the GMO, GTA system responsibilities include:

- Upon paper receipt of any forms (including grant applications, post-award action applications, FSR, FMR, cooperative agreement project applications), enters form data to the system.
- Creating first draft of the NGA; however, does not submit the NGA or edit the budget.
- Upon receipt of mail-ins, makes notes in the system that the mail in was received.
- Generate unfunded letters and application receipt acknowledgements.
- Performs information changes for post-award actions.
- Generates transaction files regarding submissions to CLO and TAGGS.

Authorizing Official

The Authorizing/Approving Official (AO) is responsible for accounting administration and review, and has fiscal authority to review budgets. Often has the last word on all grant decisions and works closely with the FMO. AO system responsibilities include:

- Verifies Common Accounting Numbers (CAN) and Object Class Code (OCC).
- Approves funding memos.

Accessing the System

An account and password from an Administrator is essential to using the GrantSolutions System. To access the system for both data entry and information retrieval:

- Enter the following URL to access the GrantSolutions Welcome Screen.

<http://www.grantsolutions.gov>

- Select the [Login](#) button.

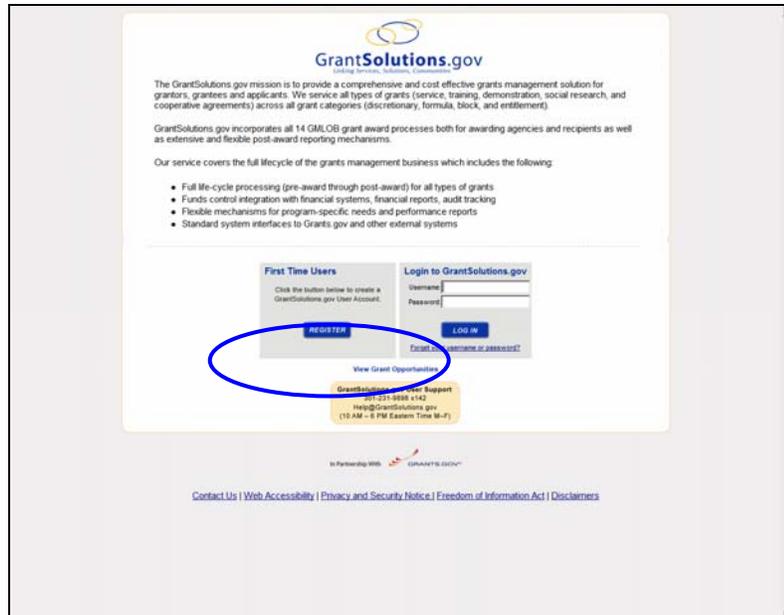


Figure 1. 1 GrantSolutions Welcome Screen.

Login Procedure

The User Name and Password entries are case sensitive.

Once the Logon screen displays:

1. Enter your User Name (Press **Tab** to move to the Password field).
2. Enter your Password.
3. Click the **Login** button.

NOTE: Please notify the GrantSolutions Administrator when access to GrantSolutions is no longer needed.

Forgotten Account Name and Password

In the event you forget your password:

- From the Login page
- Select the [Forget your username or password](#) link

Once your identity is confirmed and the provided information matches your stored profile, a new password will be sent to your email address.

GrantSolutions Message Center

Registered users of the GrantSolutions System have access to the Message Center. Once access is granted, the GrantSolutions Menu and Message Center displays.

To access from any location (Screen):

- Select the [Messages](#) link from the *left-menu*.

You must be logged into GrantSolutions in order to access the Message Center.

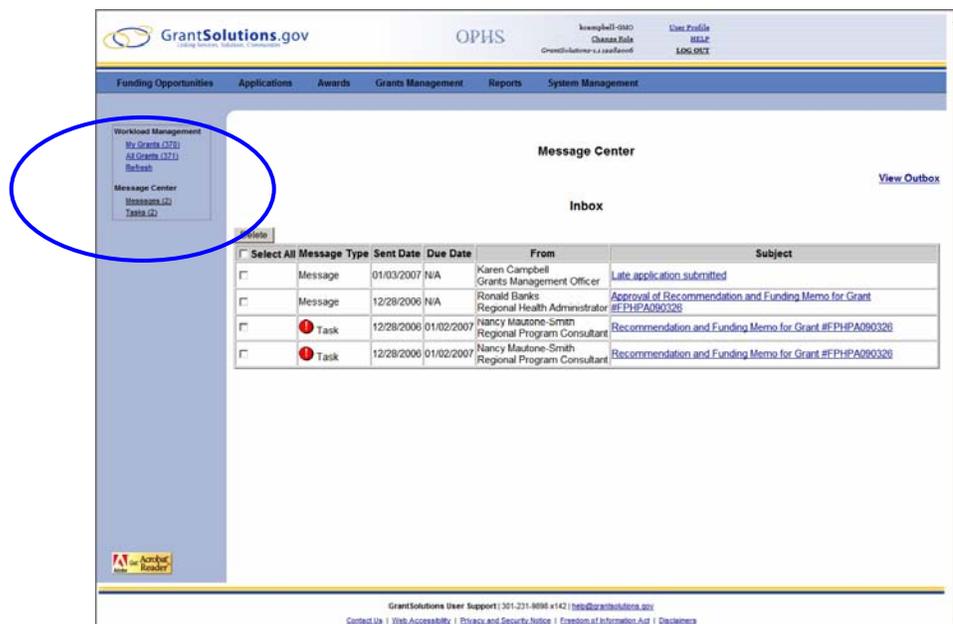


Figure 1. 2 Message Center Screen.

The Message Center is similar to an email account; however, sending and receiving messages are *restricted only* to registered GrantSolutions users. Messages can be viewed, replied to, or deleted.

- New messages cannot be sent directly from the Message Center.
- New messages can be generated from specific locations within the GrantSolutions System and from notifications and tasks occurring as a result of a GrantSolutions process.

NOTE: When a new message can be generated (e.g., from the My Grants List screen), you will see a [Send Message](#) link. For more information, see the heading “My Grants List” on page 175.

Inbox

The inbox is the holding area for all incoming messages that have been sent to you.

- A **red** exclamation point adjacent to a message indicates the message/task has been marked as urgent.
- Select the [email subject](#) link to access/view the message.

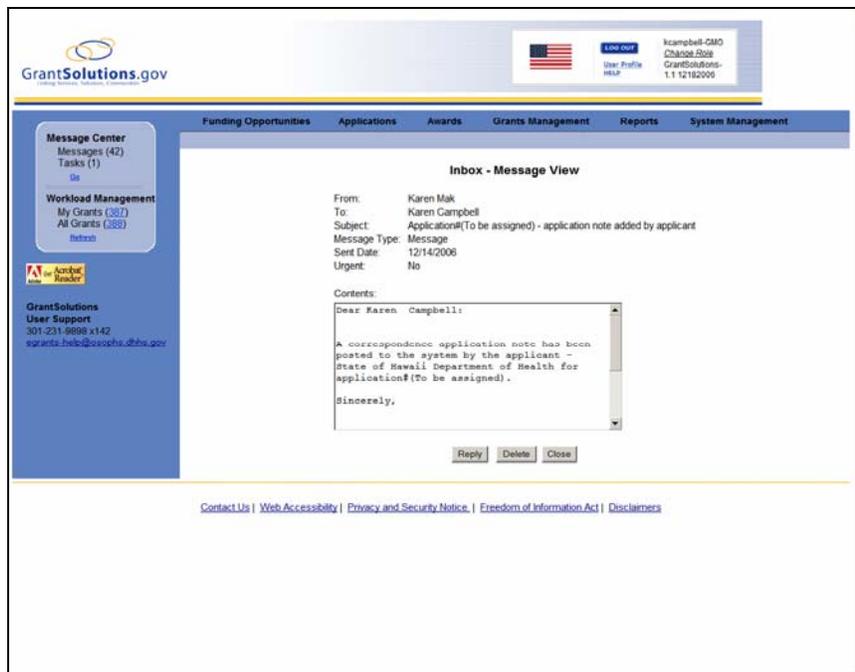


Figure 1. 3 Viewing Messages from the Inbox.

When viewing the message from the Message View Screen:

- Click the **Reply** button.

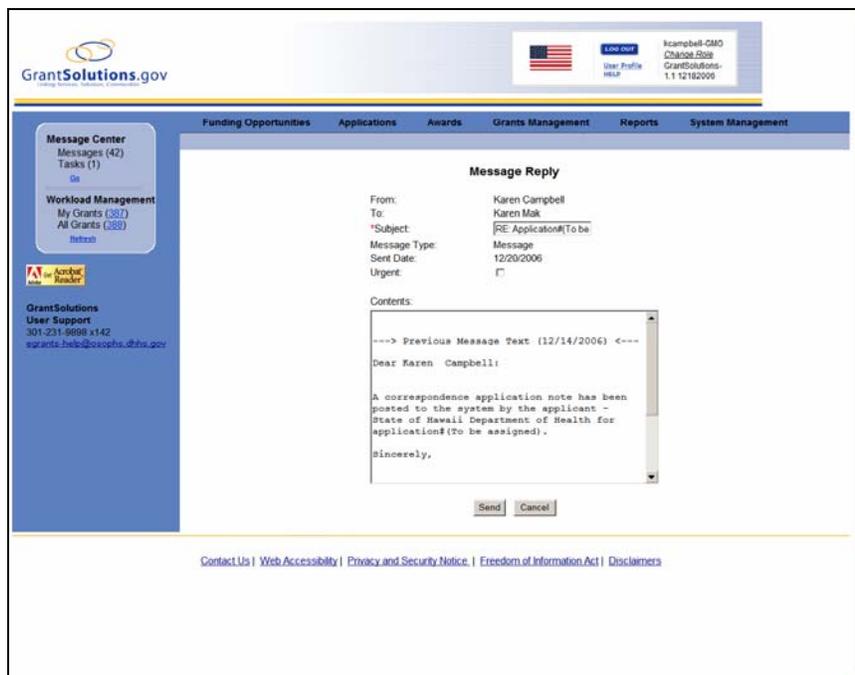


Figure 1. 4 Message Reply.

- Enter a response and click the **Send** button, which returns to the Message Center.

- Alternatively, click the **Complete** button (when applicable) to reply to the sender that the task is complete.
- Click the **Delete** button to delete the message without replying.
- Select the **Close** button to return to the Message Center and abandon any changes.

Deleting Messages

Messages can be deleted one at a time or as a group.

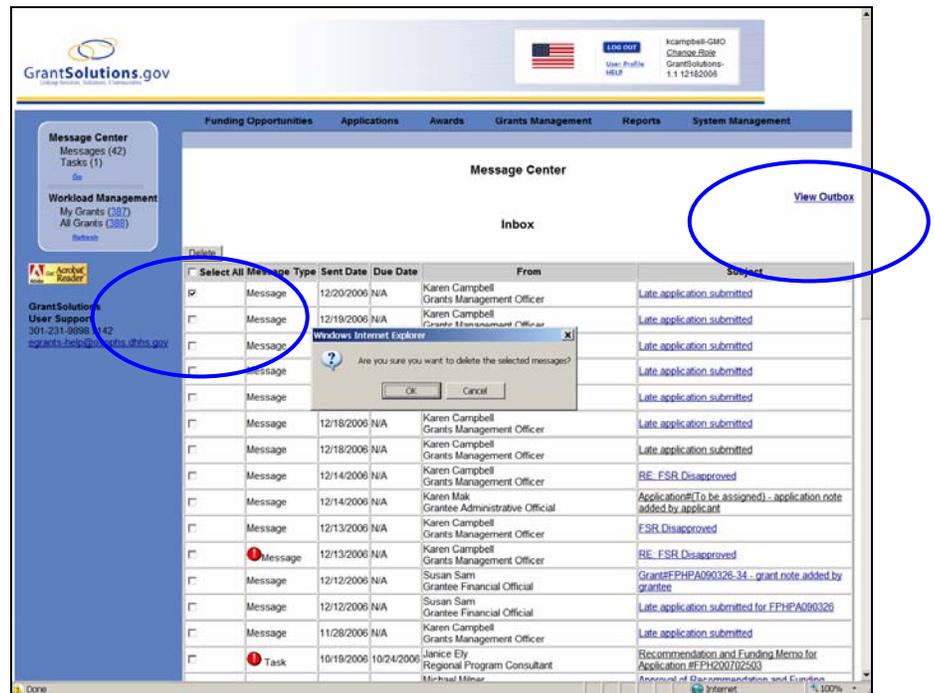


Figure 1.5 Deleting Messages from the Inbox.

- Place a **check** mark adjacent to each Message to be deleted.
- Click the **Delete** button and a Confirmation Dialog box displays.
- Click **OK** to delete all selected messages.

Outbox

The Message Outbox displays all messages that have been sent to other GrantSolutions users. These messages can be viewed; however, they may not be deleted.

To view:

- Select the [View Outbox](#) link at the top of the Message Center Screen.

Message Type	Sent Date	Due Date	To	Subject
Message	12/20/2006	N/A	Doree Perez Grants Management Specialist	Late application submitted
Message	12/20/2006	N/A	Deborah Hayes Grants Management Specialist	Late application submitted
Message	12/20/2006	N/A	DeWayne Wynn Grants Management Specialist	Late application submitted
Message	12/20/2006	N/A	Steve Fitzgerald Grants Management Officer	Late application submitted
Message	12/20/2006	N/A	Amanda Osborne Grants Management Specialist	Late application submitted
Message	12/20/2006	N/A	Brenda Donaldson Grants Management Specialist	Late application submitted
Message	12/20/2006	N/A	Sandy Acuna Regional Program Consultant	Late application submitted
Message	12/20/2006	N/A	Sandy Acuna System Administrator	Late application submitted
Message	12/20/2006	N/A	Tammy Bagley Grants Management Officer	Late application submitted
Message	12/20/2006	N/A	Robin Fuller Grants Management Specialist	Late application submitted
Message	12/20/2006	N/A	Amanda Osborne Grants Management Specialist	Late application submitted
Message	12/20/2006	N/A	Eleanor Walker Grants Management Specialist	Late application submitted
Message	12/20/2006	N/A	Eric West Grants Management Specialist	Late application submitted
Message	12/20/2006	N/A	Sandy Acuna System Administrator	Late application submitted
Message	12/20/2006	N/A	Debbie Welty Grants Management Specialist	Late application submitted
Message	12/20/2006	N/A	Margaret Griffiths Grants Management Specialist	Late application submitted

Figure 1. 6 Message Center - Outbox.

NOTE: Messages appearing in the Outbox will be removed once the recipient deletes the message (within their inbox) that you have sent.

Exiting GrantSolutions

To exit the GrantSolutions System:

- Click the [Logout](#) option at the top of screen, above the Main Menu.

Getting Help

When a problem occurs, help options are available from GrantSolutions' Main Menu.

- Above the Main Menu, select the [HELP](#) link to access the on-line User Manual.
- At the bottom of the screen, select the help@GrantSolutions.gov email link, which launches your default email application with the GrantSolutions email address added within the "To" field.

NOTE: Use the following IE Browser menu selections to set a default email program for use with Internet Explorer (IE): Tools; Internet Options; Programs tab; and the e-Mail *drop-down* list button.

- Contact the GrantSolutions Help Desk Toll Free at **1 (800) 618-0223**, locally at **(301) 231-6005**, or by FAX **(301) 231-7223**.

NOTE: The GrantSolutions Help Desk hours are 10:00 am through 6:00 pm (Eastern Time), Monday through Friday.

Audit Log

The Search Audit Log is used by the Administrator to view user access. This screen can assist the Administrator with performing basic trouble-shooting operations concerning user access and activity.

To access:

- Select the **System Security** option from the Main Menu.

Date	Action By	Username	Action Type	Name	Organization	Audit Info	Account Status
04-04-2007 02:38:53 PM	ifitzgerald	ifitzgerald	Access Granted	Steve Fitzgerald	RH Solutions		ACTIVE
04-04-2007 02:36:48 PM	mweiser	ifitzgerald	Access Granted	Steve Fitzgerald	HRSA - Healthcare Systems Bureau		Active
04-04-2007 01:59:22 PM	mweiser	ifitzgerald	Access Granted	Steve Fitzgerald	HRSA - Healthcare Systems Bureau		active
04-04-2007 09:54:30 AM	mweiser	mdiaz	Access Granted	Maria Diaz	ORF Regional Office II - New York		active
04-04-2007 08:33:41 AM	mweiser	mdiaz	Access Granted	Maria Diaz	ORF Regional Office II - New York		active

Figure 2. 1 Search Audit Log page.

Performing a Search

To view the User Audit Log, a search must be performed. The search can be executed by using one or a combination of parameter fields located at the top of the screen. In the illustration above:

- Login **Entry Dates** was used as criteria.
- Click the **Search** button.

NOTE: Search criterion is case insensitive.

System Administrator Tables

The GrantSolutions System Administrator Subsystem enables the system administrator to maintain several tables that store GrantSolutions' information. They include:

- Look-up Tables
- User Accounts Table
- User Groups Table
- Persons Table
- Organizations Table
- Regional Authority Table
- Grant Office Assignment Table
- Function Access Table
- Status Deadlines
- Form Letter Templates
- Hash Checking

Basic Lookup Tables

The Lookup Table Maintenance page allows administrators to manage various lookup lists of valid selection criteria. There is a list of 46 tables, organized into two (2) categories: Basic and Advanced. Most of the tables have the same editing, deleting, adding, and printing functionality.

To access:

- Select the [Data Reference](#) option from the Main Menu.



Figure 3.1 Look-up Table Maintenance page.

Lookup Tables are data structures containing additional attributes stored – to speed up computations.

Address Type

Illustrated above, the Address Type table sets-up various address types that can be associated with people or institutions (i.e., recipient's address or the contact information of a Grants Management Officer (GMO)).

- Highlight the Table name and click the **Retrieve** button to retrieve a list of existing address types.
- Click the **Add** button to Add an Address Type.
- Click the **Edit** link adjacent to an existing Address Type.
- Click the **Delete** link adjacent to an existing Address Type to permanently delete.
- Click the **Print Table** button to *preview* a select list of tables for printing.

NOTE: Each of the following tables has the same add, edit, delete, and print functionality.

Administrative Code

The Administrative Code table enables the maintenance of administrative codes and descriptions. A GMO is able to select from these administrative codes in Section 5 of the Notice of Grant Award - Draft form.

Advice of Allowance Comment

The Advice of Allowance Comment (AoA) table maintains comments regarding the advice of an allowance. These comments can be selected when generating a memo from the Advice of Allowance page.

Application Decision Code	The Application Decision Code table sets-up the application decision codes and descriptions. These descriptions are used in the Application Disposition List and Funding Memorandum Log pages.
Authorization	The Authorization table sets-up authorization by program code and text (description). This text is shown in the upper right corner of the Notice of Grant Award form.
Budget Category Code	The Budget Category Code table contains descriptions and active statuses of budget category codes. The budget descriptions are listed in Section B – Budget Categories, of the SF-424 A Budget Information – Non Constructive Programs form.
CFDA Code	The CFDA (Catalog of Federal Domestic Assistance) Code table sets-up and maintains information about CFDA codes. A staff member may select from a list of these codes from the Grant Announcement Maintenance page when creating a new grant.
Country	The Country table sets-up and maintains information about country codes.
Degree Type	The Degree Type table maintains the code, degree name, and active status of degree types. (Presently not used.)
DHHS Region	The DHHS (Department of Health & Human Services) Region table classifies regions by code and description.
Document Type	The Document Type table sets-up document types by description and Adobe parameter. The system recognizes only the GrantSolutions-supported document types of files uploaded by applicants.
Financial Assistance Type	The Financial Assistance Type table maintains information about financial assistance types, including codes and descriptions. (Presently not used.)
FPAR Age Category Detail	The FPAR Age Categorical Detail table sets-up FPAR age categories and their ordering display.
FPAR Contraceptive Method Code	The FPAR Contraceptive Method Code maintains a list of contraceptive method types with their descriptions, active statuses, and detail codes.
FPAR Deadlines	The FPAR Deadlines table sets FPAR deadline dates, such as the approval deadline, export deadline, etc.
FPAR Export Override	The FPAR Export Override allows you to override a FPAR export by entering a new due date or deleting it entirely.

FPAR Gender Category	The FPAR Gender Category table maintains a list of gender categories and detail codes.
FPAR Hispanic Race Code	The FPAR Hispanic Race Code maintains a list of Hispanic race codes and descriptions.
FPAR Income Status Category	The FPAR Income Status Category maintains a list of FPAR income status codes and descriptions.
FPAR Medical Staff Code	The FPAR Medical Staff Code table maintains a list of FPAR medical staff codes, descriptions, and categories.
FPAR Race Code	The FPAR Race Code table maintains a list of FPAR race codes, descriptions, and categories.
FPAR Revenue Source Code	The FPAR Revenue Source Code table sets-up FPAR revenue source codes and descriptions.
FPAR Service Code	The FPAR Service Code table sets-up FPAR service codes and descriptions.
Grant Program Type	The Grant Program Type maintains a list of grant program types by code and description. A program staff member can select the type of grant program while creating a new grant in the Grant Announcement Maintenance – Add page.
IC (Indirect Cost) Rate Base Code	The IC (Indirect Cost) Rate Base Code sets-up indirect cost rate base codes by code and description. (Presently not used.)
LLL (Disclosure of Lobbying Activities) Action Status	The LLL (Disclosure of Lobbying Activities) Action Status sets-up a federal action status by code and description. An applicant is able to select from these action statuses in Section 2 of the Disclosure of Lobbying Activities form.
LLL Action Type	The LLL Action Type sets-up a federal action type by code and description. An applicant is able to select from these action types in Section 1 of the Disclosure of Lobbying Activities form.
LLL Entity Type	The LLL Entity Type sets-up a reporting entity type by code and description. An applicant is able to select from these action types in Section 4 of the Disclosure of Lobbying Activities form.
LLL Report Type	The LLL Report Type sets-up a report type by code and description. An applicant is able to select from these report types in Section 3 of the Disclosure of Lobbying Activities form.

Note Type	The Note Type maintains a list of note types, including automatic, corresponding, and internal.
Object Class Code	The Object Class Code sets-up an object class code by code and description. A GMO is able to select from these object class codes in Section 17 of the Notice of Grant Award - Draft form.
ORG (Organization) Component Code	The ORG (Organization) Component Code sets-up an organization component code by code and description.
Organization Type	The Organization Type sets-up an organization type by code and description. An applicant can select from a list of these organization types in the Guestbook Sign-In page.
Post-Award Action	The Post-Award Action maintains a list of post-award actions, such as administrative supplement, budget revision, etc.
Program Income Type	The Program Income Type maintains a list of program income types (deduction, additional costs, matching, etc.). (Presently not used.)
Questionnaire	The Questionnaire allows the administrator to create a questionnaire concerning GrantSolutions.
Revision Type	The Revision Type maintains a list of revision types (increase award, decrease award, etc.) used in the post-award phase. (Presently not used.)
System Role	The System Role maintains a list of the system roles assigned to GrantSolutions users by role code and description. The functionality of the system is different from user to user, depending upon their system role (applicant, grantee administrative official, data analyst, etc.).
TAGGS (Tracking and Accountability of Grants in Government System) Activity Type Code	The TAGGS (Tracking and Accountability of Grants in Government System) Activity Type Code: (in development).
TAGGS Award Action Type Code	The TAGGS Award Action Type Code is in development.

Advanced Look-up Tables

The following advanced tables are available from the

To access:

- Select the [Data Reference](#) option from the Main Menu.

Application Kit Enclosures Table

The Application Kit enclosures table contains information about the enclosures used when a staff member creates an application kit. Enclosures may be added from the Enclosure Type table in the Lookup Table Maintenance page.

To access:

- Highlight the **table name**.
- Click the **Retrieve** button.



Figure 3. 2 Application Kit Enclosures Table

The four (4) columns are available for update in the Application Kit Enclosures table and are described below.

Enclosure Code

The Enclosure Code is a required unique number to identify the enclosure. The code field is four (4) characters long. The coding method show below was used to formulate the Code in the Enclosure Type table:

Code	Description
A[xxx]	The “A” indicates the enclosure is for OAPP and [xxx] is a 3-digit unique sequential number, for example “A001”
F[xxx]	The “F” indicates it is for OFP and [xxx] is a 3-digit unique sequential number, for example “F001”
SF[xx]	The “SF” indicates it is a Standard Form and [xx] is a 2-digit unique sequential number, for example “SF01”

Description

A description of the enclosure. (Required)

Type The type of the enclosure, e.g. attachment, online form, etc. (Required).

Active A radio button determining the active status of the enclosure.

- Select the **Yes** radio button to set the enclosure to active.
- Select the **No** radio button to set the enclosure to inactive.

Editing the Enclosure To edit the Enclosure:

- Click the [Edit](#) link adjacent to the selected Enclosure
- Update the enclosure description and options as necessary.
- Click the **Save** button.
- Press the **Save** button to return to the Application Kit Enclosures table displaying the saved change(s).

Deleting the Enclosure To delete an Enclosure:

- Click the [Delete](#) link adjacent to the selected Enclosure.
- Click the **OK** button on the confirmation dialog box to proceed with the deletion.
- Alternatively, select **Cancel** to return to the Application Kit Enclosures table.

Display Use To view the application templates and kits that utilizes a specific enclosure:

- Select the [Display Use](#) link.
- Click the **Close** button to return to the Application Kit Enclosures table.

CAN (Common Account Number) Table The CAN (Common Account Number) table lists the CAN number, authorization text, region number, appropriation, allotment number, allowance number, and active status. The CAN may be selected in items 20a, 21a, and 22a in the Notice of Grant Award – Draft form.

To access:

- Highlight the **table name**.
- Click the **Retrieve** button.

Look-up Table Maintenance

CAN

Retrieve Print Table

Show Deleted Items Only

Add Print Preview

CAN NUM	AUTHORIZATION	REGION	APPRO. NO	ALLOT. NO	ALLOW. NO	ACTIVE?
0-1990144	Title XX of the Public Health Service Act, D.R., P.L. 100-202, as amended	00	7500120	33	0-680144	Y
0-3044504	P.L. 91-572 PHS Act Sec. 1001 as Amended, 42 CFR 59		7500350	0-26000	0-26154	Y
1-1990146	Title XX of the Public Health Service Act, D.R., P.L. 100-202, as amended	00	7510120	33	1-680144	Y
1-3014501	P.L. 91-572 PHS Act Sec. 1001 as Amended, 42 CFR 59		7510350	1-26000	1-26151	Y
1-3024502	P.L. 91-572 PHS Act Sec. 1001 as Amended, 42 CFR 59		7510350	1-26000	1-26152	Y
1-3044504	P.L. 91-572 PHS Act Sec. 1001 as Amended, 42 CFR 59		7510350	1-26000	1-26154	Y
1-3054505	P.L. 91-572 PHS Act Sec. 1001 as Amended, 42 CFR 59		7510350	1-26000	1-26156	Y
1-3984521	Title X, P.L. 103-112	00	7510350	1-26000	1-26128	Y
1-3986413	Title X, P.L. 103-112	00	7510350	1-26000	1-26144	Y

Figure 3.3 CAN Table.

The seven (7) columns available for update in the Application Kit Enclosures table are described below.

CAN Number

A seven-character billing reference number used to specify the appropriation and allowance to be charged.

Fiscal Year

A four-digit Federal budget year (i.e., October 1 to September 30). (Required).

Authorization

Text describing the authorization of the CAN.

- Click the *drop-down* button to select from a list of available region options. (Required).

Region

The DHHS (Department of Health & Human Services) Region.

- Click the *drop-down* button to select from a list of available options. (Required).

Appropriation Number

A budget designation that identifies the source or destination of funds related to an agreement.

Allotment Number

The Allotment number is

Allowance Number

The Allowance number is

Active

A radio button determining the active status of the CAN.

- Select the **Yes** radio button to set the CAN to active.

- Select the **No** radio button to set the CAN to inactive.

Editing the CAN

To edit the CAN:

- Click the [Edit](#) link adjacent to the selected CAN
- Update the CAN options as necessary.
- Click the **Save** button to update the database and return to the CAN table displaying the saved change(s).

Deleting the CAN

To delete an Enclosure:

- Click the [Delete](#) link adjacent to the selected Enclosure.
- Click the **OK** button on the confirmation dialog box to proceed with the deletion.
- Alternatively, select **Cancel** to return to the CAN table.

Enclosure Type Table

The Enclosure Type Table lists the type code, description, display order, and active status of enclosures used in application kits.

To access:

- Highlight the **table name**.
- Click the **Retrieve** button.

The screenshot shows the 'Look-up Table Maintenance' interface on the GrantSolutions.gov website. The interface includes a navigation menu at the top with options like 'Data Reference', 'Org/User Management', 'Grants Workload Management', 'System Configuration', 'System Security', and 'GATES Management'. A 'Message Center' is visible on the left. The main content area displays a dropdown menu for 'ENCLOSURE TYPE' with options: 'FINANCIAL ASSISTANCE TYPE', 'FPAR AGE CATEGORY DETAIL', 'FPAR CONTRACEPTIVE METHOD CODE', and 'FPAR DEADLINES'. Below the dropdown is a 'Show Deleted Items Only' checkbox. The table below is titled 'ENCLOSURE TYPE' and has columns for 'TYPE CODE', 'DESCRIPTION', 'DISPLAY ORDER', and 'ACTIVE FLAG'. Each row includes 'Edit' and 'Delete' links. At the bottom of the table are 'Add' and 'Close' buttons.

TYPE CODE	DESCRIPTION	DISPLAY ORDER	ACTIVE FLAG
ET1	Online Forms	4	Y
ET10	Proof of Filing	7	Y
ET13	Additional Information to be Submitted	6	Y
ET2	Program Narrative	5	Y
ET5	Grant Announcement	1	Y
ET7	Statute/Regulations	2	Y
ET9	Information for the Applicant	3	Y

Figure 3. 4 Enclosure Type Table.

The four (4) columns are available for updates in the Enclosures Type table are described below.

Enclosure Type Code

The Enclosure Type Code is a unique code number to identify the enclosure type. (Required)

Description A description of the enclosure. The maximum number of characters allowed is 40. (Required)

Display Order The numeric data entered here will group all enclosures according to their corresponding enclosure types in ascending order. (Required)

Active A radio button determining the active status of the Enclosure Type.

- Select the **Yes** radio button to set the Enclosure Type to active.
- Select the **No** radio button to set the Enclosure Type to inactive.

Editing the Enclosure Type To edit the Enclosure Type:

- Click the [Edit](#) link adjacent to the selected Enclosure Type.
- Update the enclosure options as necessary.
- Click the **Save** button to update the database and return to the Enclosures Type table displaying the saved change(s).

Deleting the Enclosure Type To delete an Enclosure Type:

- Click the [Delete](#) link adjacent to the selected Enclosure Type.
- Click the **OK** button on the confirmation dialog box to proceed with the deletion.
- Alternatively, select **Cancel** to return to the Enclosures Type table.

State Table The State Table lists the states' code, name, SPOC name, FIPS code, UI state, region, and active status.

To access:

- Highlight the **table name**.
- Click the **Retrieve** button.

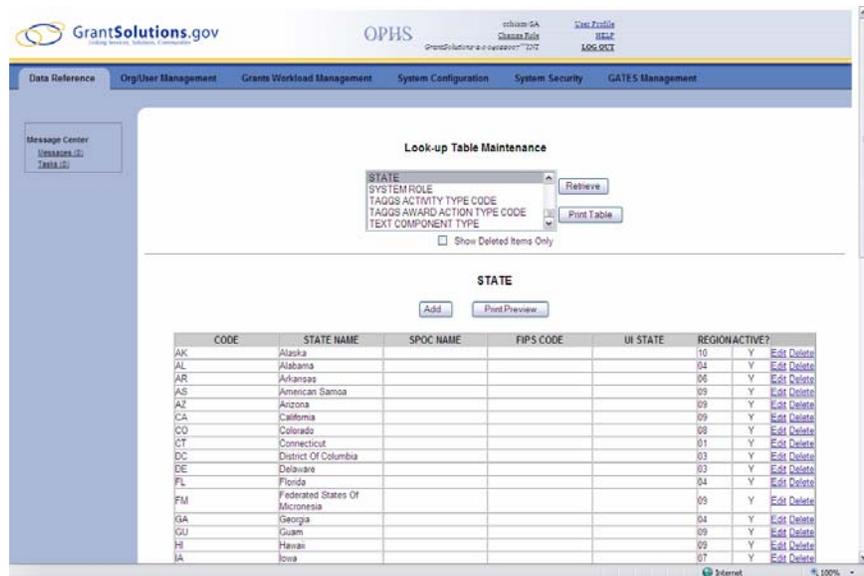


Figure 3. 5 State Table.

The six (6) columns are available for updates in the State table are described below.

State Code

The abbreviation of the State Name.

State Name

The state name. (Required)

SPOC Name

The name of the state's SPOC (State Single Points of Contacts) person.

- Select the State SPOC Person by entering a name as a parameter.
- Click the **Search** button.
- Click the [Select](#) link adjacent to the person's name in enter the name.

FIPS Code

The state's Federal Information Processing Standard code (FIPS), unique 5-digit number that is assigned to each county in the United States. (Required)

UI State

The UI (Unemployment Insurance) State Name.

Region

The Department of Health & Human Services (DHHS) region the state belongs to.

- Select the *drop-down* list button and select the names of the region from the available list.

Active

A radio button determining the active status of the State.

- Select the **Yes** radio button to set the State to active.

- Select the **No** radio button to set the State to inactive.

Editing the Enclosure

To edit the State:

- Click the [Edit](#) link adjacent to the selected State.
- Update the description and options as necessary.
- Click the **Save** button.
- Press the **Save** button to return to the State table displaying the saved change(s).

Deleting the Enclosure

To delete a State:

- Click the [Delete](#) link adjacent to the selected State.
- Click the **OK** button on the confirmation dialog box to proceed with the deletion.
- Alternatively, select **Cancel** to return to the State table.

Printing a Table

From the Lookup Table Maintenance page, each table can be printed.

- Click the **Print Table** button to access the Look-up Table in a separate window.
- Select one of the Table names from the list

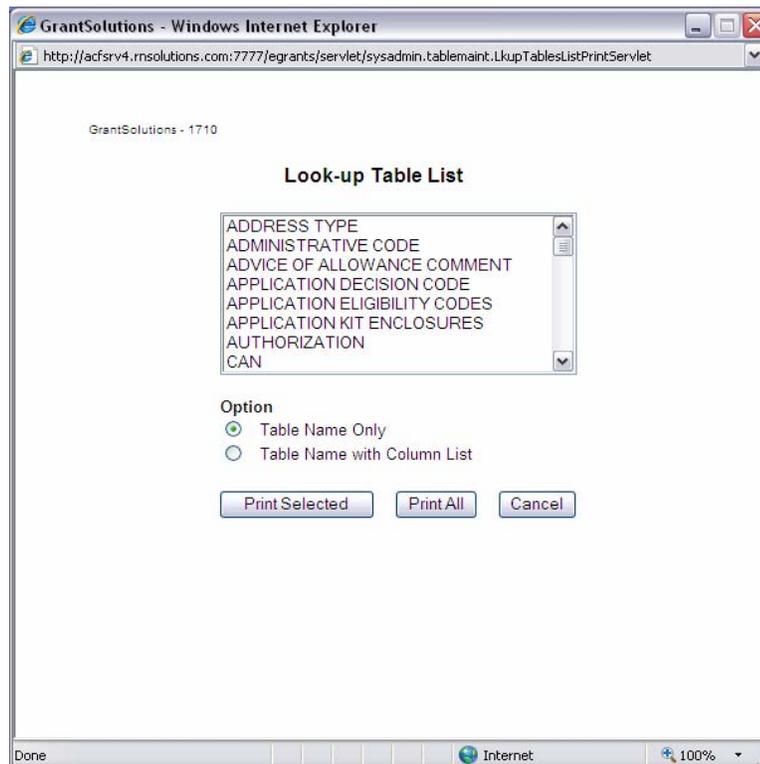


Figure 3. 6 Look-up Table List.

NOTE: To make more than one table name selection, Press and Hold the Ctrl key while left-clicking your mouse on the choices.

- Select one of the two radio buttons: (1) Print the table name only or (2) Print the table name and its column list.
- Click the **Print Selected** button to print only those table names selected.
- Alternatively, click the **Print All** button to print all the table names in the scroll box.
- A separate page will display the Table List Print Result page.
- Select the **File; Print** option from your browser window, which sends the list to your local printer.

User Information

User tables identify the group of persons that have been granted access to the GrantSolutions' System. It is used by the Administrator to maintain User Accounts, Organizational information, Staff Assignments and allows administrators to manage system access.

Manage Person Information

Users must be identified for purposes of accounting, security, logging and resource management. The Manage Persons Screen allows the Administrator to search for users, view existing information, update user/organization information, and/or delete users within the GrantSolutions' System.

To access:

- Select the [Org/User Management](#) option from the Main Menu.
- Select the [People](#) option from the Sub-menu.

The screenshot displays the 'Manage Persons' interface on the GrantSolutions.gov website. The page includes a navigation menu with options like 'Data Reference', 'Org/User Management', 'Grants Workload Management', 'System Configuration', 'System Security', and 'GATES Management'. The 'People' sub-menu is active. The main content area features a search form with the following fields and options:

- Name (Last, First): Harding
- Email Address: [Empty]
- Organization Name: [Empty]
- Organization Level: All Org Levels
- Primary Role: All Roles
- Options:
 - Show Inactive Records
 - Show Deleted Records
 - Show Unassigned Federal staff
 - Show Without User Accounts

Below the search form is a table titled 'Number of Persons: 4'. The table has the following columns: Name (Last, First, Middle), Title (Active), Organization Name (Level), Contact Info, Username (Role), and Action. The data rows are as follows:

Name (Last, First, Middle)	Title (Active)	Organization Name (Level)	Contact Info	Username (Role)	Action
Harding, Susan M. (P.O. Box 645)	6476 (Yes)	Adirondack County Parent & Child Center (Grantee)	egrant-admin@msolutions.com REMOVED REMOVED Middlebury, VT, UNITED STATES	sharding (PVPD)	Edit Person Delete Person/Acct Edit Primary Acct Select Org Edit Addresses
Harding, Theodore (Professor)	20884 (Yes)	American Lung Association of San Diego and Imperial Counties (Grantee)	REMOVED 123 A Street, SE San Diego, CA, 95892 UNITED STATES	TH@msolutions.com null	Edit Person Delete Person Create User Acct Select Org Edit Addresses
Harding, Jane (Director, Accounting)	17156 (Yes)	New York State Department of Health (Grantee)	212-655-1212 egrant-admin@msolutions.com REMOVED Albany, NY, UNITED STATES	sharding (FO)	Edit Person Delete Person/Acct Edit Primary Acct Select Org Edit Addresses
Harding, Cassandra L. (FA)	13933 (Yes)	Full Time Student (Guest)	REMOVED egrant-admin@msolutions.com REMOVED MEMPHIS, TN, UNITED STATES REMOVED	sharding (GUEST)	Edit Person Delete Person/Acct Edit Primary Acct Select Org Edit Addresses

At the bottom of the table, there are two buttons: 'Add Person' and 'Close'. The 'Add Person' button is circled in blue.

Figure 4. 1 Manage Persons page.

Performing a Search

A Person search can be narrowed by entering specific criteria in the parameter fields:

- The person's last name, first name, and organization can be entered when searching for a specific individual record.
- Alternatively, the entire list of GrantSolutions' users can be retrieved by leaving the parameter fields blank.
- Click the **Search** button.

Viewing Person Information

Once a search has been executed

- Select the [Person's Name](#) link to access a view-only pop-up window of the Person Information Screen illustrated below.

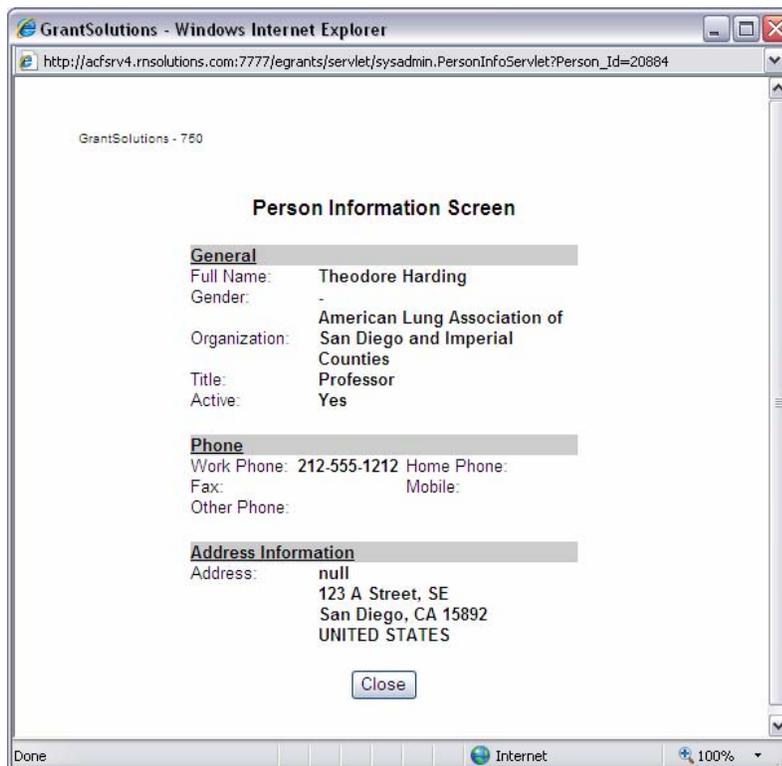


Figure 4. 2 Person Information Screen.

Edit Person Information

Once a search has been executed:

- Select the [Edit Person](#) link adjacent to the Person's Name to update the person information.

The screenshot shows the 'Edit Person' form in the GrantSolutions.gov system. The form is titled 'Edit Person' and is located under the 'User Accounts' tab. The form is divided into several sections: 'Name', 'Contact Information', and 'Primary Address Information'. Two blue ovals highlight the 'Contact Information' and 'Primary Address Information' sections. The 'Contact Information' section includes fields for 'Organization Level' (Grantee), 'Organization' (George Mason University), 'Position Title', 'Work Phone' (202-555-1212), 'Fax', 'Mobile', and 'Other Phones'. The 'Primary Address Information' section includes fields for 'Division/Dept' (REMOVED), 'Street Address' (REMOVED), 'City' (Washington), 'State' (District Of Columbia), 'Zip Code', and 'Country' (UNITED STATES). The form also includes a 'Save' button and a 'Cancel' button.

Figure 4. 3 Edit Person Screen.

- The **Contact Information** may be updated.
- The **Primary Address Information** may be updated.

Add an Address

Once a search has been executed, additional Addresses can be added to a Person's account:

- Select the **Edit Address** link adjacent to the Person's Name.

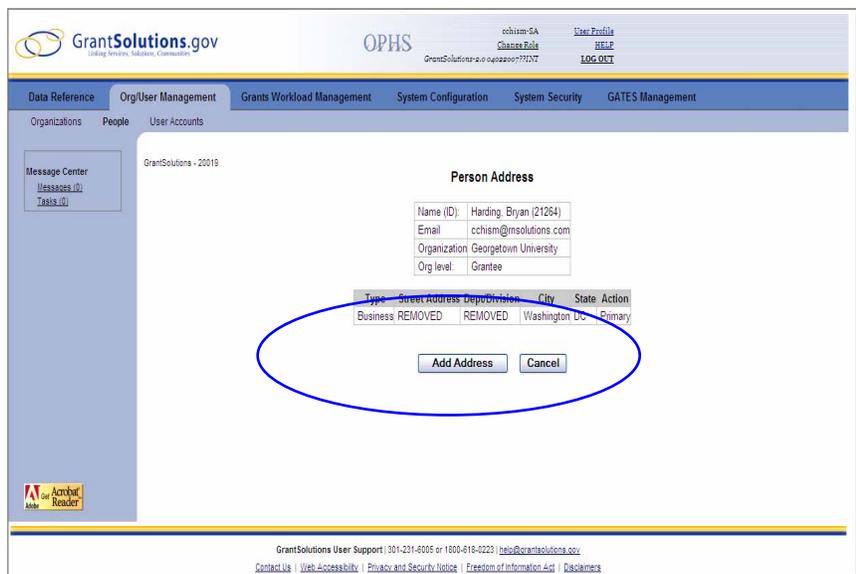


Figure 4. 4 Person Address.

- Click the **Add Address** button.

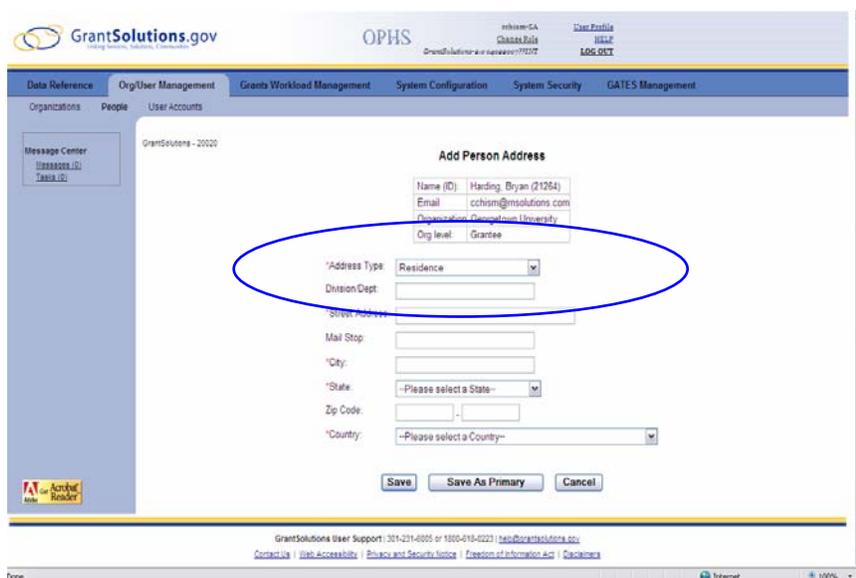


Figure 4. 5 Add Person Address.

- Select an **Address Type** from the *drop-down* list button.
- Complete all Required Fields.
- Click the **Save** button to update the database with the additional address.
- Alternatively, click the **Save As Primary** button to make the new address the Primary Address.
- Click **Cancel** to return to the Manage Person Screen.

Deleting the Person Information

Once a search has been executed, the Person record can be marked for deletion:

- Click the [Delete Person](#) link adjacent to the Person's Name.

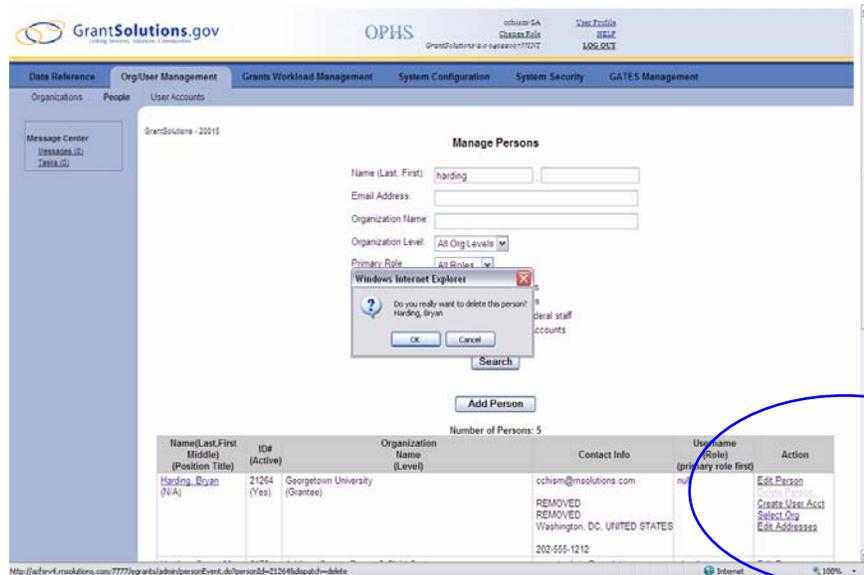


Figure 4. 6 Delete Person Record.

- Click the **OK** button once the Window dialog box displays to confirm the deletion.

NOTE:

Adding a Person Record

To add a Person record, make certain the person does not have an existing account by performing a search.

The search can be executed by using one or a combination of parameter fields located at the top of the screen.

- Illustrated in Figure 2. 1, the person's **last name** was entered as criterion.
- Click the **Search** button to execute the search.
- Review the list of retrieved names.
- Select the **Add Person** button at the bottom of the page to access the Add Person page.

GrantSolutions.gov OPHS

Organization: cchiam@msolutions.com User Profile: cchiam@msolutions.com 10/6/07

Data Reference: Org/User Management Grants Workload Management System Configuration System Security GATES Management

Organizations People User Accounts

Message Center (3 Messages) (2 Tasks)

GrantSolutions - 2016

Add Person

Name

*Prefix: Mr.

or Other:

*First: Bryan

Middle:

*Last: Harding

Suffix (e.g. Sr., Jr., MD, PhD):

Active: Yes No

Contact Information

*Organization Level: Granta

Please Select An Org:

*Organization: Georgetown University

Position Title:

*Work Phone: 202-555-1212

Fax:

Mobile:

Other Phone:

*E-mail (This must be correct to create a user account): cchiam@msolutions.com

Primary Address Information

Division/Dept: REMOVED

*Street Address: REMOVED

Mail Stop:

*City: Washington

*State: District Of Columbia

Zip Code:

*Country: UNITED STATES

GrantSolutions User Support: 202-221-6000 or 1-800-618-0222 | [Contact Us](#) | [View Accessibility](#) | [Privacy and Security Notice](#) | [Location and Information Act](#) | [Disclaimer](#)

Figure 4. 7 Add Person page.

- Complete all required fields.
- Click the **Save** button to update the database with the new record and return to the Manage Person Screen.

Creating a User Account

A user account can be created directly from the Manage Person Screen. Once a Person record has been added or a search has been performed:

- Click the [Create User Acct](#) link adjacent to the Person's Name.

The screenshot displays the 'Add User Account' form in the GrantSolutions.gov system. The form includes the following fields and options:

- Name (ID):** Hardin, Bryan (21254)
- Email:** bcham@msolutions.com
- Organization:** Georgetown University
- Org level:** Grantee
- * Username:** bhardin
- * Group:** --Select a Group--
- * Primary Access Role:** --Select a Group First--
- Password Management:**
 - Enter
 - Reset
- * New Password:** [Text Input]
- * Confirm New Password:** [Text Input]
- Login Failures:** 0
- Status:** Active Locked

Buttons for 'Save' and 'Cancel' are located at the bottom of the form.

Figure 4. 8 Add User Account Screen.

- Select the **Group Name** from the *drop-down* list.
- Select the **Primary Access Role** from the *drop-down* list.
- Enter the Password.
- Enter the Confirmation Password.
- Click the **Save** button.

Managing User Accounts

System Administrators may use the Manage User Accounts Screen to create new user accounts, modify existing accounts, and grant or remove access to the GrantSolutions System.

To access:

- Select the **Org/User Management** option from the Main Menu
- Select the **User Accounts** option from the Sub-menu.

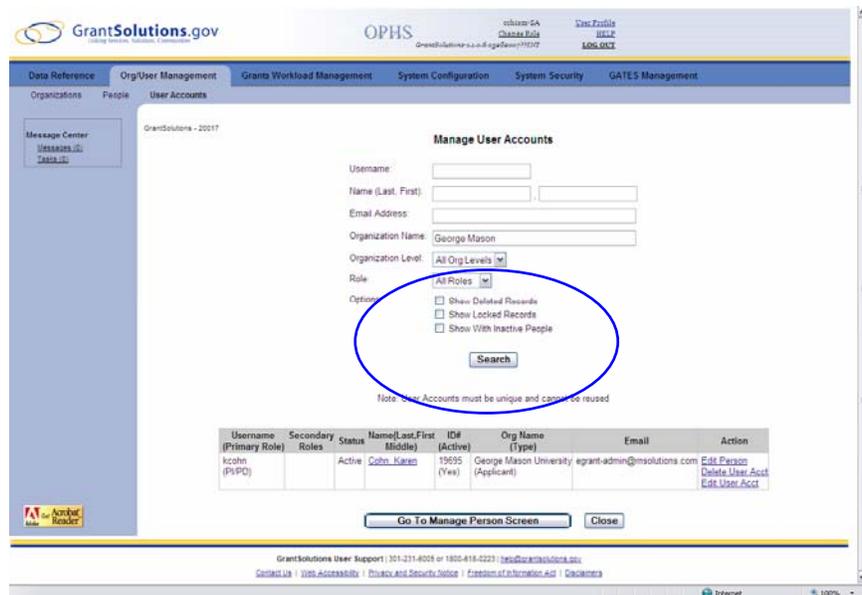


Figure 4. 9 Manage User Account Screen.

Performing a Search

To view and access user accounts, a search must be performed. The search can be executed by using one or a combination of parameter fields located at the top of the screen.

Once the criteria has been entered:

- Click the **Search** button.

NOTE: The Manage User Accounts page allows the Administrator to search by User Names and/or Organization. Additionally, the search criterion is case insensitive.

Viewing Inactive, Deleted, or Locked User Accounts

Accounts that are Inactive, Deleted and/or Locked can be accessed from the Manage User Accounts page.

- Click the **checkbox** adjacent to the desired option.
- Enter any additional search criteria (i.e., User's Organization).
- Click the **Search** button and the retrieved list of accounts display.

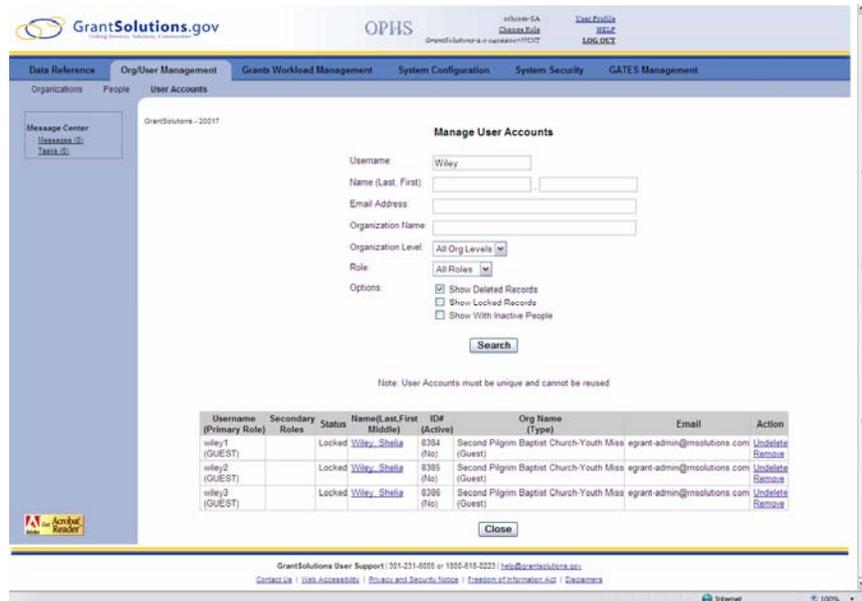


Figure 4. 10 Manage User Accounts – Show Deleted Records.

In the illustration above, the “*Show Deleted Records*” checkbox was selected. The System Administrator has the option of un-deleting or removing the user account.

- Click the [Undelete](#) link to unmark the record’s delete flag within the database, which allows the user account to be searched without having the “*Show Deleted Records*” checkbox checked.

NOTE: The user account will remain inactive until it is marked as Active in the Edit User Account screen.

- Click the [Remove](#) link to permanently delete a user account from the database.
- Click **OK** when the confirmation dialog box displays to proceed with removing the user account.
- Alternatively, click the **Cancel** button to abandon the deletion and return to the Manage User Account Screen.

Creating User Groups

The User Group Screen allows you to search for or add a group. The following groups are required for GrantSolutions:

- Administrator
- External
- Grantee
- Staff



Figure 4. 11 User Group Search Screen.

Performing a Search

To view and access user groups, a search must be performed.

- Enter the Group Name.
- Click the **Search** button.

NOTE: Search criterion is case insensitive.

Viewing Deleted Organizations

To view only the deleted user groups from the User Group Search Screen:

- Click the Show Deleted Items Only **checkbox**.
- Enter any additional search criteria (i.e., User Group Name).
- Click the **Search** button and the retrieved list of User Groups displays.

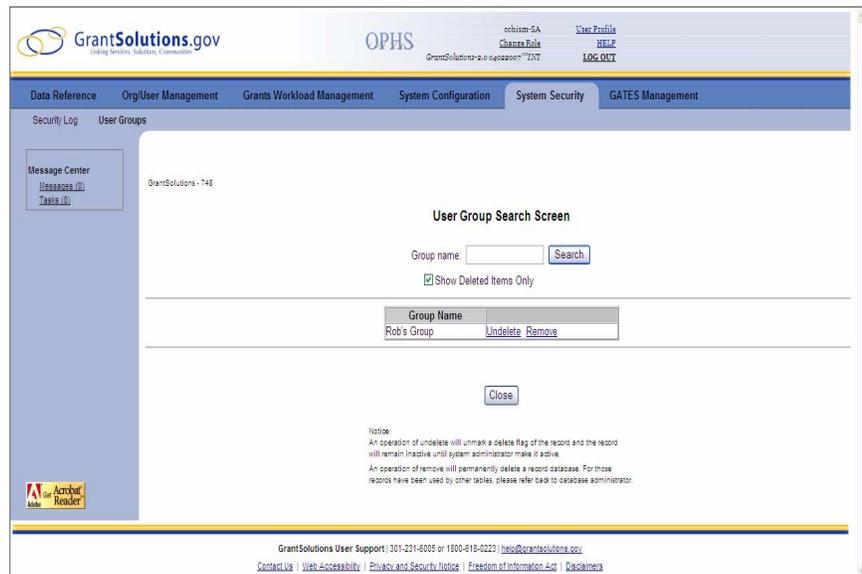


Figure 4. 12 User Groups – Show Deleted Records.

In the illustration above, the “*Show Deleted Items Only*” checkbox was selected. The System Administrator has the option of un-deleting or removing the user account.

- Click the [Undelete](#) link to unmark the record’s delete flag within the database, which allows the organization to be searched without having the “*Show Deleted Items Only*” checkbox checked.

NOTE: The User Group record will remain inactive until it is marked as Active.

- Click the [Remove](#) link to permanently delete the user group record from the database.
- Click **OK** when the confirmation dialog box displays to proceed with removing the user group record.
- Alternatively, click the **Cancel** button to abandon the deletion and return to the User Group Search Screen.

Editing a User Group

To edit a User Group, once a search has been executed:

- Select the [Edit](#) link adjacent to the User Group Name.
- Make any changes to the text fields.
- Click the **Save** button and return to the User Group Search Screen.

Deleting an Organization

To delete an Organization, once a search has been performed:

- Click the [Delete](#) link adjacent to the User Group Name.
- Click the **OK** button within the confirmation dialog box to proceed with the deletion.
- Alternatively, click the **Cancel** button to abandon the deletion.

Adding a Role to a Group

To add a role to a User Group, a search must be executed.

- Select the **Edit** link adjacent the User Group to access the Edit-User Group Screen.

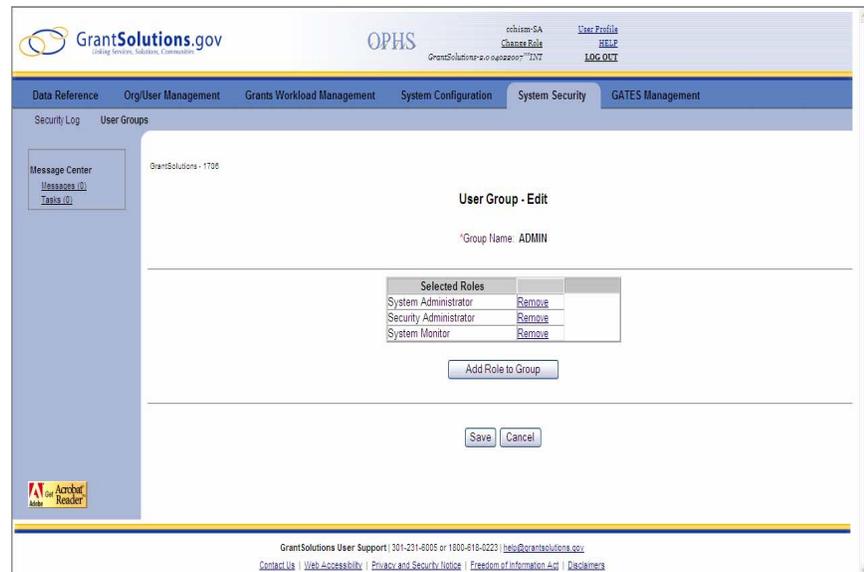


Figure 4. 13 User Group – Edit.

- Click the **Add Role to Group** button.

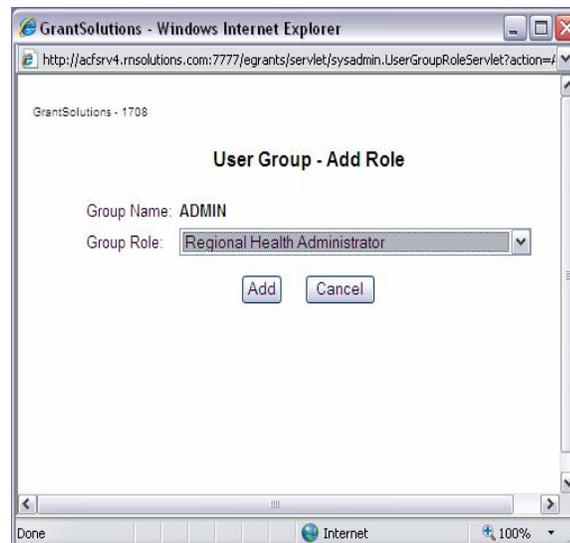


Figure 4. 14 User Group – Add Role.

- Select the **Group Role** from the *drop-down* list.
- Click the **Add** button to add the role and return to the User Group Search Screen.

To remove the role:

- Click the [Remove](#) link.
- Click **OK** on the confirmation dialog box to proceed with removing the role.
- Alternatively, click **Cancel** to return to the User Group – Edit page.

Manage Organizations

The Manage Organizations Screen allows Administrators to search for, add new, edit and delete organizational information.

To access:

- Select the [Org User Management](#) option from the Main Menu.
- Select the [Organizations](#) option from the Sub-menu.



Figure 4. 15 Manage Organizations Screen.

Performing a Search

To view and access Organization records, a search must be performed.

- Select the Organization Type. (Internal is the default)
- Select the Organization Level from the *drop-down* menu. (This is a required field when performing a search).
- Alternatively, enter the Organization's Name.
- Click the **Search** button.

NOTE: To search for an organization, the organization's name, abbreviation, EIN (entity identification number), and parent organization name can be used as search criteria. Search criterion is case insensitive.

To view only the deleted organizations from the Organization Search Screen, enter your search criteria (optional) and click the “Show Deleted Items Only” checkbox. Next, click the Search button. You now have the option of un-deleting or removing organizations from the system.

Viewing Deleted Organizations

To view only the deleted organizations from the Organization Search Screen:

- Click the Show Deleted Orgs **checkbox**.
- Enter any additional search criteria (i.e., Organization Name).
- Click the **Search** button and the retrieved list of Organizations display.

The screenshot shows the 'Manage Organizations' interface. The 'Organization Type' is set to 'Internal'. The 'Organization Level' is 'All Internal'. The 'Organization Name' is 'grants'. The 'Show Deleted Orgs' checkbox is checked. The search results table is as follows:

Organization (Level) (EIN)	ID# (Active)	Address	Parent Organization (Level) (EIN)	Action
Office of Grants Management by OPHS (Internal)	2196 (In)	REMOVED	Office of Grants Management (GHO)	Undelete
(NULL)		Rockville, MD, UNITED STATES	(NULL)	Remove

Figure 4. 16 Manage Organizations – Show Deleted Records.

In the illustration above, the “Show Deleted Orgs” checkbox was selected. The System Administrator has the option of un-deleting or removing the user account.

- Click the [Undelete](#) link to unmark the record’s delete flag within the database, which allows the organization to be searched without having the “Show Deleted Orgs” checkbox checked.

NOTE: The Organization record will remain inactive until it is marked as Active.

- Click the [Remove](#) link to permanently delete the organization record from the database.
- Click **OK** when the confirmation dialog box displays to proceed with removing the user account.
- Alternatively, click the **Cancel** button to abandon the deletion and return to the Manage Organizations Screen.

Editing an Organization

To edit an organization, once a search has been executed:

- Select the [Edit](#) link adjacent to the Organization Name.
- Make any changes to the text fields.
- Click the **Save** button and return to the Organization Screen.

Deleting an Organization

To delete an Organization, once a search has been performed:

- Click the [Delete](#) link adjacent to the Organization Name.
- Click the **OK** button within the confirmation dialog box to proceed with the deletion.
- Alternatively, click the **Cancel** button to abandon the deletion.

Adding a New Organization

To add an organization, once search has been performed:

- Scroll to the bottom.
- Click the **Add Internal Org** button.

The screenshot shows the 'Add Organization' form in the GrantSolutions.gov system. The form is titled 'Add Organization' and is part of the 'Org/User Management' section. It contains various fields for organization details, including Organization Name, Level, Abbreviation, Phone Number, FAX, DUHS, Organization Type, FPAR#, Org Component Type, Parent Org Name, ERF, Registered Name, Active status, and Address Information (Address Type, Division/Dept, Street Address, Mail Stop, City, State, Zip Code, Country). The form is set to 'GrantSolutions - 2010' and has 'Add' and 'Close' buttons at the bottom.

Figure 4. 17 Adding and Organization.

- Complete all required fields (fields prefaced with a red asterisk).
- Click the **Add** button to save the record and return to the Manage Organizations Screen.

Combine/Remove an Organization

To combine two organizations, once a search has been performed:

- Select the [Combine/Remove](#) link adjacent to the Organization Name.

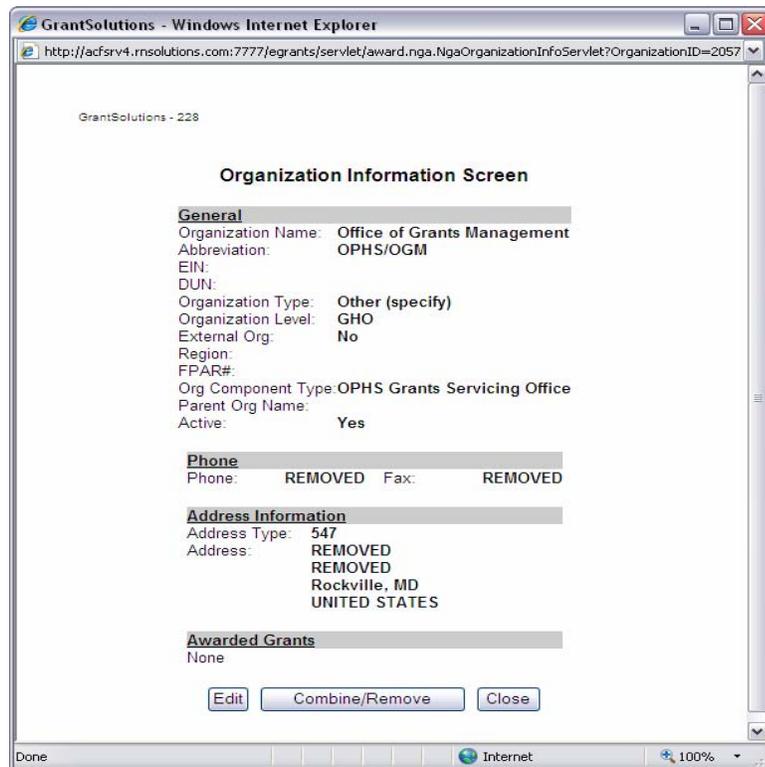


Figure 4. 18 Organization Information.

- Click the **Combine/Remove** button to search for the Target Organization.

GrantSolutions - 10086

Select a Target Organization

You have just indicated that an organization should be removed, and all of its associated data should be transferred to another organization. Please use the search fields below to select the organization that should receive this data - the target organization.

Organization Name:

City:

State:

Abbreviation:

EIN:

Parent Org Name:

Organization Level:

Show Deleted Items Only: Yes No

Organization Name	EIN	Street Address	City	State	Organization Level	Action
-------------------	-----	----------------	------	-------	--------------------	--------

Figure 4. 19 Select the Target Organization.

Grants Workload Management

When managing the Grants Workload the following screens assist the Grants Staff with pre-planning and distribution of the workload.

Manage Service Region

The Manage Service Region Screen allows Administrators to add, edit, or delete Regional Authorities.

To access:

- Select the [Grants Workload Management](#) option from the Main Menu.
- Select the [Service Region](#) option from the Sub-menu.

The screenshot displays the 'Manage Service Region' interface. At the top, there's a navigation bar with 'Grants Solutions.gov' and 'OPHS'. Below that, a menu bar includes 'Data Reference', 'Org/User Management', 'Grants Workload Management', 'System Configuration', 'System Security', and 'GATES Management'. The main content area has a search form with 'Region Name' (Boston) and 'Service Area' fields. An 'Add' button is below the form. A table below the form shows the following data:

Region Name	Grant Region Code	Service Areas	Count	Active	Action
Region 1 - Boston, MA	01	Connecticut Area Maine Area Massachusetts Area New Hampshire Area Region 1 - Boston, MA Area Rhode Island Area Vermont Area	7	Y	Edit Delete

Below the table, there are 'Action Notes' for Delete, Undelete, and Remove operations.

Figure 5. 1 Manage Service Region.

Performing a Search

To view, add, or edit a Service Region, a search must be performed. The search can be executed by using one or a combination of parameter fields located at the top of the screen.

Once the criteria has been entered:

- Click the **Search** button.

NOTE: The search criterion is case insensitive.

Editing the Service Region

To edit a region, once a search has been executed:

- Click the [Edit](#) link adjacent to the selected Region Name.

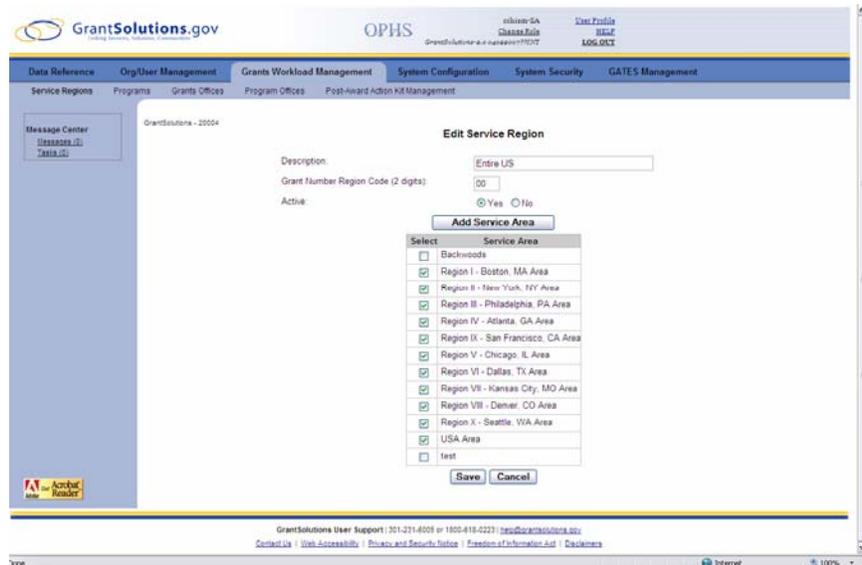


Figure 5. 2 Edit Service Region.

- Place a **checkmark** adjacent to the Service Area that should be added to the selected Service Region.
- Alternatively, click the checkbox to remove a **checkmark**.
- Click the **Save** button to update the Service Region with the addition and return to the Manage Service Region Screen.

Deleting a Service Region

To remove a regional authority from the list:

- Click the [Remove](#) link adjacent to the Region Name.

Adding a Service Region

To add a regional authority to the list, once a search has been executed:

- Click the **Add** button from the Manage Service Region Screen.

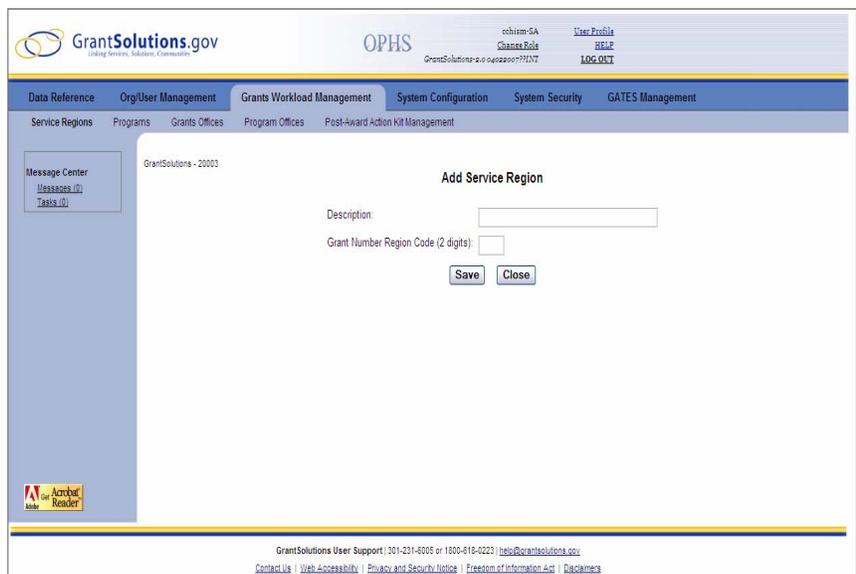


Figure 5. 3 Adding a Service Region.

- Enter a **Description** and a *two-digit* **Regional Code**.
- Click the **Save** button to update the database and return to the Manage Service Region Screen.

NOTE: The newly added name will display on-screen.

Manage Programs

To access:

- Select the [Grants Workload Management](#) option from the Main Menu.
- Select the [Programs](#) option from the Sub-menu.

The screenshot displays the 'Manage Programs' page in the GrantSolutions.gov system. At the top, there are navigation tabs: Data Reference, Org/User Management, Grants Workload Management, System Configuration, System Security, and GATES Management. The main content area features a search form with the following fields and options:

- Program Name:
- Grant # Program Code:
- Options:
 - Show Deleted
 - Show Unassigned to Headquarter Office
- Buttons:

Below the search form, there is an 'Add' button and a table showing the results. The table is titled 'Number Of Programs: 1' and has the following columns: Name, Grant # Program Code, HQ Office / Location, Active, Program Activities, GPTs, CFDA, and Action.

Name	Grant # Program Code	HQ Office / Location	Active	Program Activities	GPTs	CFDA	Action
Family Planning	PA	Office of Family Planning Rockville, MD	Y	Family Planning Information and Education (FPI)	Family Planning Information and Education	93.217	Edit Program Delete Program Manage Program Activities Manage GPTs
				Family Planning Services (FPH)	Family Planning Services	93.217	Edit Program Delete Program Manage Program Activities Manage GPTs
				Family Planning Nurse Practitioner Training (FPT)	Family Planning General Training (Regional)	93.260	Edit Program Delete Program Manage Program Activities Manage GPTs
					Family Planning Nurse Practitioner Training	93.260	Edit Program Delete Program Manage Program Activities Manage GPTs
					Family Planning General Training (Central Office)	93.260	
					Family Planning Clinical Training (Central Office)	93.260	
				Family Planning Research (FPR)	Family Planning Research	93.974	Edit Program Delete Program Manage Program Activities Manage GPTs
					Family Planning Male Research	93.974	

Below the table, there is an 'Add' button and 'Action Notes' section:

Action Notes:

- Delete:** An operation of delete will mark a delete flag of the record and the record will remain inactive until system administrator make it active.
- Undelete:** An operation of undelete will unmark a delete flag of the record and the record will remain inactive until system administrator make it active.
- Remove:** An operation of remove will permanently delete a record database. For these records have been used by other tables, please refer back to database administrator.

The footer contains contact information for GrantSolutions User Support: 301-231-8000 or 1-800-616-0223, and links for Contact Us, Web Accessibility, Privacy and Security Notice, Freedom of Information Act, and Downloads.

Figure 5. 4 Manage Programs.

Performing a Search

To view, add, or edit a Program, a search must be performed. The search can be executed by using one or a combination of parameter fields located at the top of the screen.

Once the criteria has been entered:

- Click the **Search** button.

NOTE: The search criterion is case insensitive.

Edit Program

To edit a Program:

- Click the [Edit Program](#) link adjacent to the selected Program.

GrantSolutions.gov OPHS

Admin:SA Class:Full User:SA LOG OFF

Data Reference Orig/User Management Grants Workload Management System Configuration System Security GATES Management

Service Regions Programs Grants Offices Program Offices Post-Award Action Kit Management

Message Center Helpdesk Helpdesk Helpdesk

GrantSolutions - 20052

Program - Edit

*Program Abbreviation: D61

*Program Name: HRSA/Organ Transplantation

*Grant # Program Code: QT

*Agency Name: Health Resources and Services Administration

Active: Yes No

Select the CFDA's for this Program

Select	Primary	CFDA Code	CFDA TITLE
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	93.134	Grants To Increase Organ Donation
<input type="checkbox"/>	<input type="radio"/>	93.004	Cooperative Agreements to Support all the Health Status of Minority Populations
<input type="checkbox"/>	<input type="radio"/>	93.006	State/Territorial and Tech Assistance Capacity Development Minority HIV/AIDS
<input type="checkbox"/>	<input type="radio"/>	93.100	Health Disparities in Minority Health
<input type="checkbox"/>	<input type="radio"/>	93.105	Bilingual/Bicultural Service Demonstration Grants
<input type="checkbox"/>	<input type="radio"/>	93.510	Family and Community Violence Prevention Program

Save Cancel

GrantSolutions User Support: 301-221-6005 or 1800-616-3223 | tsa@grantsolutions.gov
[Contact Us](#) | [Web Accessibility](#) | [Privacy and Security Notice](#) | [Freedom of Information Act](#) | [Disclaimer](#)

Figure 5. 5 Edit Program

The updateable fields are described below along with the functionality:

- Program Abbreviation** Pre-assigned abbreviation of the Program name.
- Program Name** The name of the program.
- Grant # Program Code** The Program Code is a unique code that identifies the program. (Required)
- Agency Name** The name of the federal agency using the program.
- Click the *drop-down* button to view a list of Federal Agencies for selection. (Required)
- Active** The Active radio button determines the active status of the program.
- Select the **Yes** radio button to set the program to active.
 - Select the **No** radio button to set the program to inactive.
- CFDA** The Catalog of Federal Domestic Assistance (CFDA) Code that accurately references the Title of the Federal assistance program.

Once changes have been made:

- Click the **Save** button to update the Program and return to the Manage Programs Screen.

Manage Program Activities

To manage the Program Activities:

- Select the [Manage Program Activities](#) adjacent to the selected Program Name.

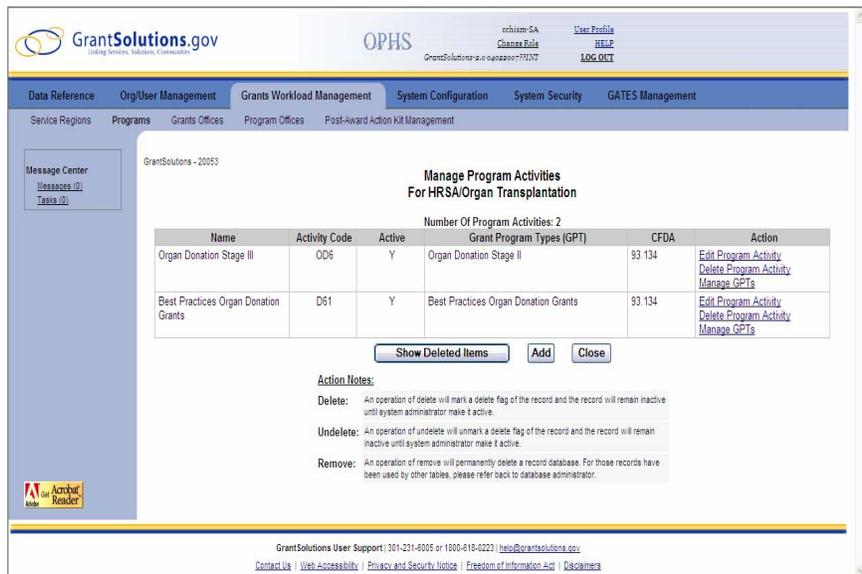


Figure 5. 6 Manage Program Activities Screen.

Manage Program Types

To Manage Program Types:

- Select the [Manage Program Types](#) adjacent to the Program Name.

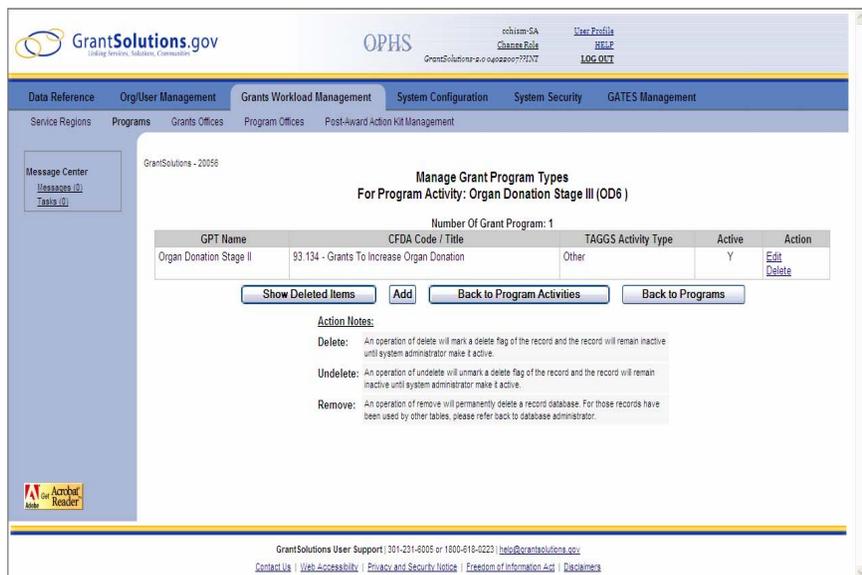


Figure 5. 7 Manage Grant Program Types.

Grant Assignment

The Grants Office Assignment List Screen allows Administrators to manage federal staff assignments by Office or Person.

Grant Assignment by Office

Grant Assignment by Office

To access:

- Select the [Grants Workload Management](#) option from the Main Menu.
- Select the [Grants Offices](#) option from the Sub-menu.
- Select the [By Office](#) link from the *left-menu*.

GrantSolutions.gov OPHS

eduhim:SA View Profile
Change Role BLP
GrantSolutions.gov/04022007/772177 LOG OUT

Data Reference Org/User Management Grants Workload Management System Configuration System Security GATES Management

Service Regions Programs Grants Offices Program Offices Post-Award Action Kit Management

Assignments
By Office
By Person

Message Center
Messages (0)
Tasks (0)

GrantSolutions - 20022

Grants Office Assignment List

Grants Office Name:

Grants Office Type: GHO GSO Both

Show Inactive Assignment:

Number Of Assignments: 2

GHO - Office of Grants Management					
Name (Last, First)	User Account	Role	Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Actions
Bagley, Tammy	tbagley	GMS			Edit Assignments End All Assignments
Hilton, Pam	philton	GMD			Edit Assignments End All Assignments

GrantSolutions User Support | 301-231-8005 or 1-800-618-0223 | help@grantsolutions.gov
[Contact Us](#) | [Web Accessibility](#) | [Privacy and Security Notice](#) | [Freedom of Information Act](#) | [Disclaimers](#)

Figure 5. 8 Grants Office Assignment List.

Grant Assignment by Person

Grant Assignment by Person

To access:

- Select the [Grants Workload Management](#) option from the Main Menu.
- Select the [Grants Offices](#) option from the Sub-menu.
- Select the [By Person](#) link from the *left-menu*.

GrantSolutions.gov OPHS

John Doe SA
GrantSolutions.gov
GrantSolutions.gov

System Profile
Logout

Service Regions Programs Grants Offices Program Offices Post-Award Action Kit Management

Assignments
By Office
By Person

Message Center

GrantSolutions - 2023

Grants Office Person List

Role: Grants Management Officer

Name (Last, First):

Show: Assigned Unassigned Both
 Inactive Assignments

Search

Number Of Assignments: 8
Number Of Staff Selected: 6
Number Of Unassigned Staff: 0

GHO - Office of Grants Management					
Name (Last, First)	User Account	Role	Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Actions
Hilton, Pam	philton	GMO			Edit Assignments End All Assignments

GSO - Office of Grants Management					
Name (Last, First)	User Account	Role	Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Actions
Bagley, Tammy	tbagley-gmo	GMO			
Brandon, Andrea L.	abrandon	GMO			
Campbell, Karen	kcampbell	GMO			Edit Assignments End All Assignments
Fitzgerald, Steve	sfitzgerald-gmo	GMO			Edit Assignments End All Assignments
Hilton, Pam	philton	GMO			Edit Assignments End All Assignments
West, Eric	ewest	GMO			Edit Assignments End All Assignments

GSO - HRSA - OT Office of Grants Management					
Name (Last, First)	User Account	Role	Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Actions
Hilton, Pam	philton	GMO			Edit Assignments End All Assignments

Unassigned					
Name (Last, First)	User Account	Role	Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Actions
No matching record found					

GrantSolutions User Support: 301-231-4035 or 1800-618-0223 | [Contact Us](#) | [Web Accessibility](#) | [Privacy and Security Notice](#) | [Feedback](#) | [Home](#)

Figure 5. 9 Grants Office Person List.

Manage Program Offices

Manage Program Offices can be accomplished by

Manage Program Offices by Headquarters

Manage Program Offices by Headquarters

To access:

- Select the [Grants Workload Management](#) option from the Main Menu.
- Select the [Program Offices](#) option from the Sub-menu.
- Select the [Headquarters](#) link from the *left-menu*.

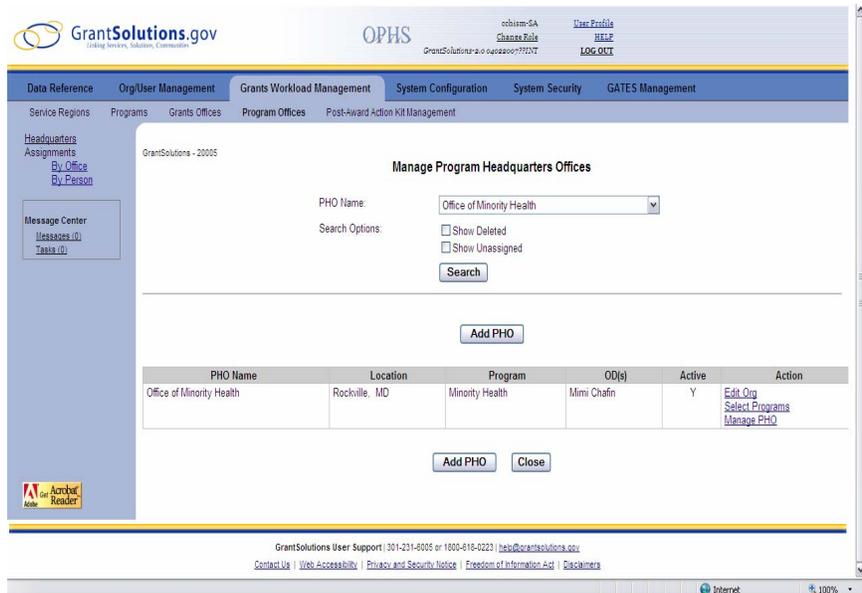


Figure 5. 10 Manage Program Headquarters Offices.

Manage by Program Office

Manage by Program Office

To access:

- Select the **Grants Workload Management** option from the Main Menu.
- Select the **Program Offices** option from the Sub-menu.
- Select the **By Office** link from the left-menu.

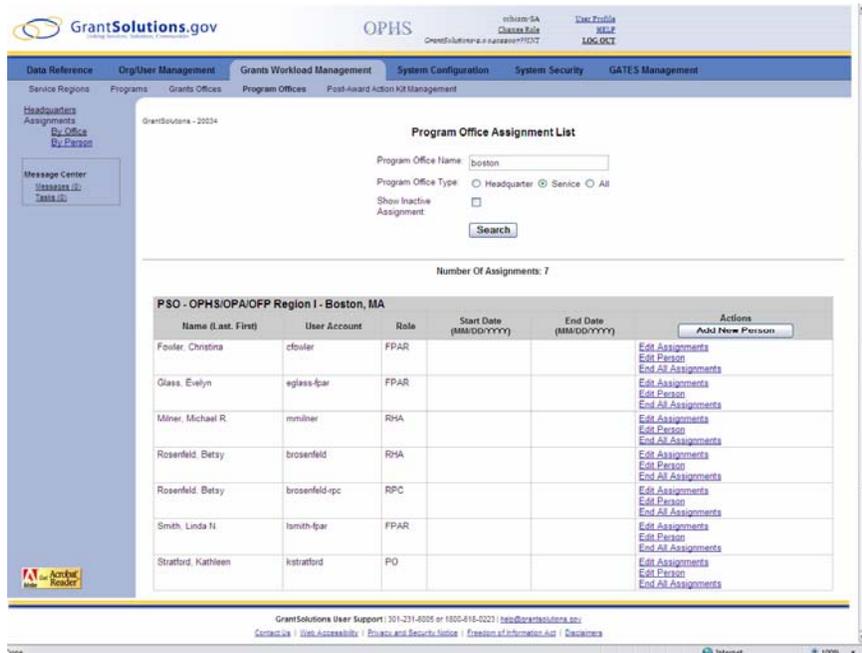


Figure 5. 11 Program Office Assignment List.

Manage by Program Person

Manage by Program Person

To access:

- Select the [Grants Workload Management](#) option from the Main Menu.
- Select the [Program Offices](#) option from the Sub-menu.
- Select the [By Person](#) link from the *left-menu*.

The screenshot shows the GrantSolutions.gov interface. The main content area is titled "Program Office Person List" and includes search filters for Role (set to "Program Authorizing Official"), Name (Last, First), and Show options (Assigned, Unassigned, Both). A "Search" button is present. Below the filters, it indicates "Number of Unassigned Staff/Role: 2". A table titled "Unassigned" lists the following data:

Name (Last, First)	User Account	Role	Actions
Acuna, Sandy	sacuna-ao	AO	Edit Assignments Edit Person
Pascal, Chris B	cpascal	AO	Edit Assignments Edit Person

The footer of the page contains contact information and legal notices.

Figure 5. 12 Program Office Person List.

Post Award Action Kit Management

Managing the Post Award Action Kit involves



Figure 5. 13 Post Award Action Kit.

Viewing the Action Kit

To view the Action Kit, once a search has been performed:

- Select the [View](#) link adjacent to the Action Kit Name.

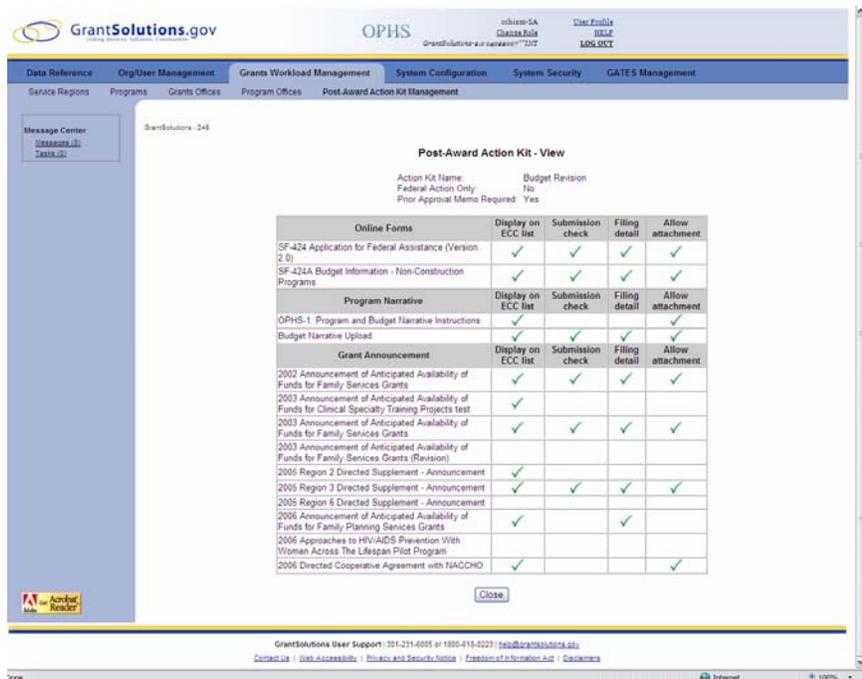


Figure 5. 14 Viewing Post Award Action Kit.

Assemble Application Kit

To assemble the Application Kit:

- Select the [Edit](#) link adjacent to the Action Kit name.
- Click the **Next** button

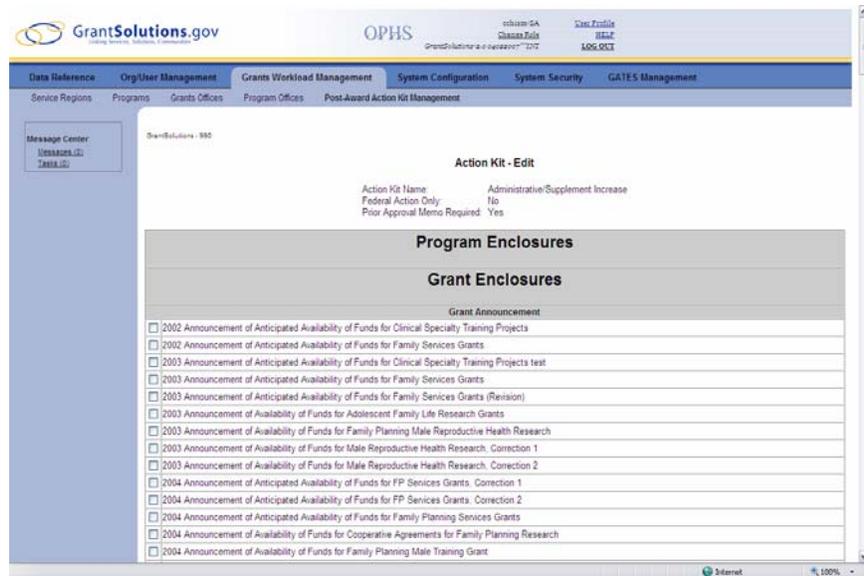


Figure 5. 15 Action Kit.

System Configuration

The system configuration area allows the Administrator to manage the tables that set-up an assortment of components to assist users with the GrantSolutions System.

- Text Configuration
- Form Letters
- Hash Checking
- Offsets
- Task Messages
- Password Management
- EIN Management

Manage Text Configuration

To access:

- Select the [System Configuration](#) Main Menu option.
- Select the [Text Configuration](#) Sub-menu option.

The screenshot shows the GrantSolutions.gov System Configuration interface. The main content area displays the 'Text Configuration List' screen, which contains a table of configuration items. The table has four columns: Module Name, Text Type, and Action. The 'Action' column contains 'Edit' links for each row. The table lists various modules and their corresponding text types, such as 'Form224', 'CLO_SUBMIT_FROM', 'CLO_SUBMIT_TO', 'CLO_SUBMIT_SUBJECT', 'CLO_SUBMIT_BODY', 'FPAR_EXPORT_SUBMIT_FROM', 'FPAR_EXPORT_SUBMIT_TO', 'FPAR_EXPORT_SUBMIT_SUBJECT', 'FPAR_EXPORT_SUBMIT_BODY', 'REPLY_TO_ADDRESS', 'BOC_ADDRESS', 'CLO_SUBMIT_CC', 'EIL_SENDER', and 'SYSTEM'. The 'SYSTEM' entries have 'Name', 'Type', 'Username', 'Email Address', 'Org Name', and 'Position' as text types. The 'ANNOUNCEMENT' entries have 'AgencyContact', 'AgencyContactEmailAddr', and 'AgencyContactEmailDesc' as text types.

Module Name	Text Type	Action
Form224	Congress Link	Edit
CLO_SUBMIT_FROM	Email Address	Edit
CLO_SUBMIT_TO	Email Address	Edit
CLO_SUBMIT_SUBJECT	Email Subject	Edit
CLO_SUBMIT_BODY	Email Message	Edit
FPAR_EXPORT_SUBMIT_FROM	Email Address	Edit
FPAR_EXPORT_SUBMIT_TO	Email Address	Edit
FPAR_EXPORT_SUBMIT_SUBJECT	Email Subject	Edit
FPAR_EXPORT_SUBMIT_BODY	Email Message	Edit
REPLY_TO_ADDRESS	Email Address	Edit
BOC_ADDRESS	Email Address	Edit
CLO_SUBMIT_CC	Email Address	Edit
EIL_SENDER	Email Address	Edit
SYSTEM	Name	Edit
SYSTEM	Type	Edit
SYSTEM	Username	Edit
SYSTEM	Email Address	Edit
SYSTEM	Org Name	Edit
SYSTEM	Position	Edit
ANNOUNCEMENT	AgencyContact	Edit
ANNOUNCEMENT	AgencyContactEmailAddr	Edit
ANNOUNCEMENT	AgencyContactEmailDesc	Edit

Figure 6. 1 Text Configuration List Screen

Edit Textual Modules

To edit the CLO_SUBMIT_FROM email address:

- Click the [Edit](#) link.

The screenshot displays the 'Manage Text Configuration' interface. At the top, there is a navigation bar with options like 'Data Reference', 'Org/User Management', 'Grants Workload Management', 'System Configuration', 'System Security', and 'GATES Management'. The 'System Configuration' section is active, showing sub-options like 'Text Configuration', 'Form Letter Templates', 'Hash Checking', 'Offsets', 'Task Message Due Dates', 'Password Management', and 'EIM Management'. The main content area is titled 'Manage Text Configuration' and contains the following fields:

- Module Name: CLO_SUBMIT_FROM
- Text Type: Email Address
- Text: egrants-admin@hhs.gov

At the bottom of the form, there are two buttons: 'Save Changes' and 'Cancel'. The footer of the page includes contact information for GrantSolutions User Support and various policy links.

Figure 6. 2 Manage Text Configuration Screen.

Form Letter Templates

The Form Letter Templates page allows administrators to manage the form letter templates used in the reports system. Form letter templates can be used for grant approval letters, grant disapproval letters, pending applications, etc. You may upload form letter templates by first downloading the standard form letter merged fields data source file and then downloading the sample template.

To access:

- Select the [System Configuration](#) option from the Main Menu.
- Select the [Form Letter Templates](#) option from the Sub-menu.

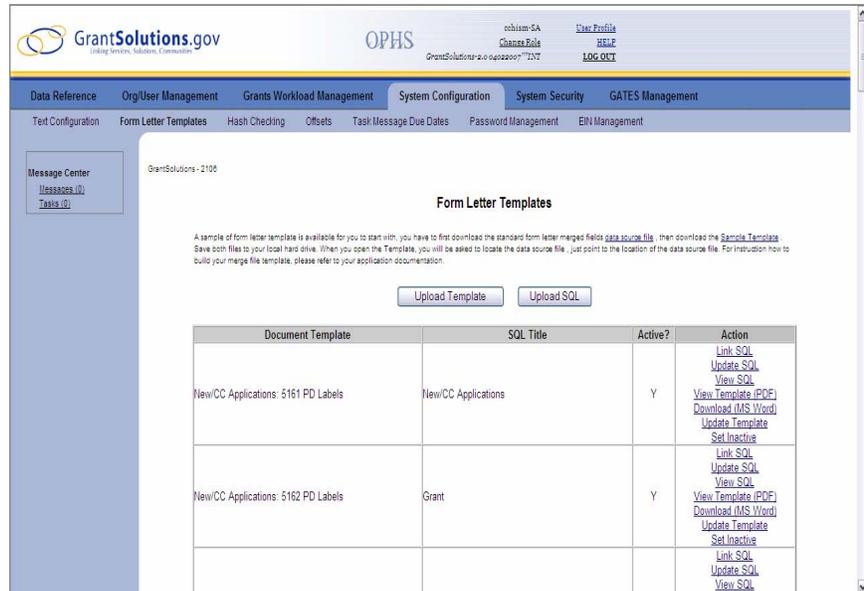


Figure 6. 3 Form Letter Templates.

Upload Template

To uploading a Form Letter Template:

Click the **Upload Template** button

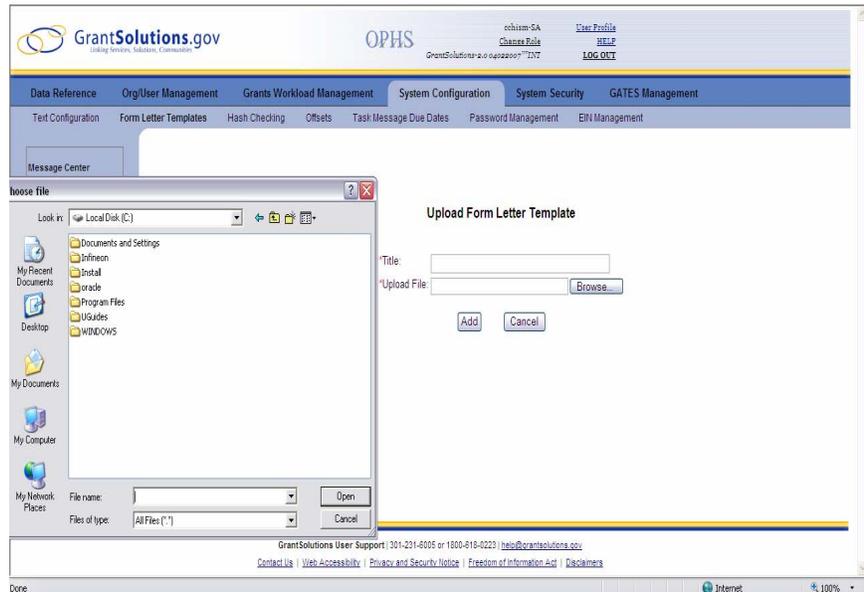


Figure 6. 4 Upload Form Letter Temp

- Enter a title name.
- Click the **Browse** button.
- From the Choose File dialog box, locate the file you wish to upload.
- Click the **Open** button, which adds the selected filename to the Upload File field.

- Click the **Add** button and the Form Letter Templates page displays the uploaded file.

NOTE: Save the file to your local hard drive and when you open the template, you will be asked to locate the data source file. Point to the location of the data source file.

Viewing, Activating, and Downloading Templates

To view a template:

- Click the [View Template \(PDF\)](#) link in the Action column and a .PDF version of the file will be displayed. (In development)
- Click **File/Save As** from the menu.
- Enter a file name and click the **Save** button.

To download a template:

- Click the [Download \(MS Word\)](#) link, which displays the file in Microsoft Word.
- Click **File/Save As** from the menu.
- Enter a file name and click the **Save** button.

To de-activate a template:

- Click the [Set Inactive](#) link and an Alert popup window displays.
- Click the **OK** button to make the template inactive.

To re-activate a template:

- Click the [Re-Activate](#) link and an Alert popup window displays.
- Click the **OK** button to re-activate the Template

Upload SQL

To upload a SQL statement from the Form Letter Templates page:

Click the **Upload SQL** button.

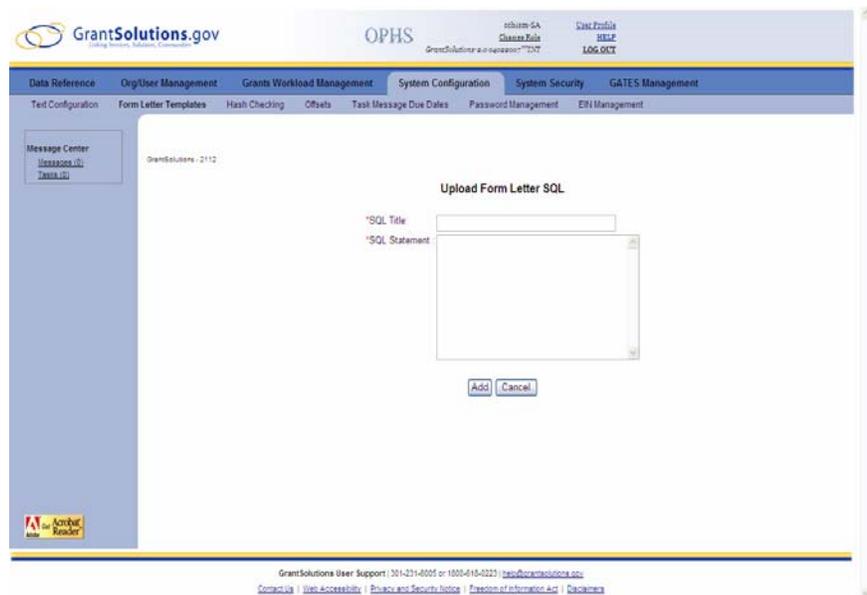


Figure 6.5 Upload Form Letter SQL. [2112].

- Enter a SQL title.
- Enter the SQL statement.
- Click the **Add** button to add the SQL statement and return to the Form Letter Template Screen.

NOTE: One SQL statement can be linked to multiple templates; however, only one template can be linked to only one SQL statement.

Hash Checking

The Hash Checking page allows administrators to verify the validity of an uploaded file. A hash is fixed-length value calculated from digital data to uniquely identify data. Hashes are used to check the integrity of files and documents and are designed so that a small change in a document will produce a big change in the hash.

Hash checking occurs when the hash function is executed and, within GrantSolutions, may be performed on:

1. Application attachments
2. Application notes
3. Enclosures

NOTE: The Administrator does not have access to “Work in Progress” files.

Application Attachment Hash Validation

To perform hash validation on application attachments:

- Select the [System Configuration](#) option from the Main Menu.
- Select the [Hash Checking](#) option from the Sub-menu.
- Select the [Application Attachment](#) from the *left-menu*.

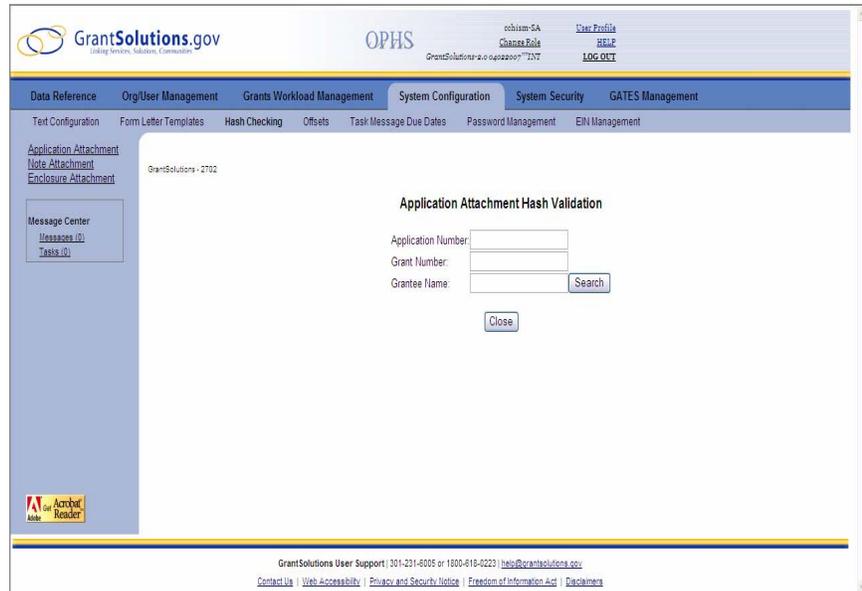


Figure 6. 6 Application Attachment Hash Validation Screen.

A search must be executed:

- Enter an application number, a grant number, or a grantee name in the parameter fields
- Alternatively, to search for all the attachments, leave these fields blank.
- Click the **Search** button.
- Select the **checkbox** adjacent to the file you wish to validate.
- Click the **Validate** button and the Hash Verify screen displays, indicating whether the original hash is valid or not.
- To open the file, click the document name link.
- To close the page, click the Close button.

Application Note Hash Validation

To perform hash validation on application notes:

- Select the [System Configuration](#) option from the Main Menu.
- Select the [Hash Checking](#) option from the Sub-menu.
- Select the [Note Attachment](#) from the *left-menu*.

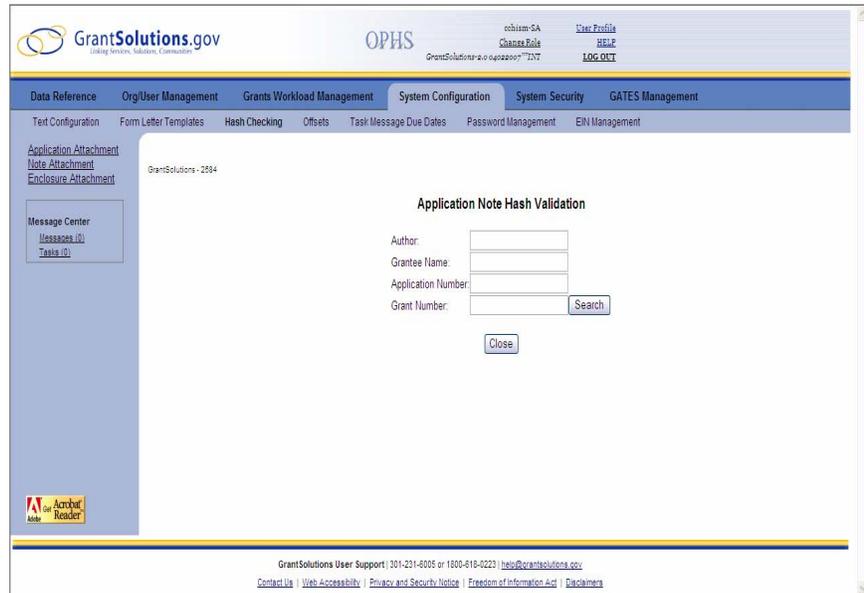


Figure 6. 7 Application Note Hash Validation.

Enclosure Attachment Hash Validation

To perform hash validation on an enclosure:

- Select the **System Configuration** option from the Main Menu.
- Select the **Hash Checking** option from the Sub-menu.
- Select the **Enclosure Attachment** from the *left-menu*.



Figure 6. 8 Enclosure Attachment Hash Validation.

- Select an enclosure from the *drop-down* list.
- Click the **Search** button (not displayed)
- Select a document by clicking a checkbox.

- Click the **Validate** button and the Enclosure Hash Verify page displays indicating whether the original hash is valid or not.
- To open the file, click the [document name](#) link.
- To close the page, click the **Close** button.

Status Deadlines

The Offset menu provides the Administrator with several menus for defining values for deadline date parameters for GrantSolutions.

FSR Offsets

To set the FSR application deadlines:

- Select the [System Configuration](#) option from the Main Menu.
- Select the [Offsets](#) option from the Sub-menu.
- Select the [FSR](#) link from the *left-menu*.



Figure 6. 9 FSR Offsets.

Non-Competing Offsets

To set the Non-Competing application deadlines:

- Select the [System Configuration](#) option from the Main Menu.
- Select the [Offsets](#) option from the Sub-menu.
- Select the [Non-Competing](#) link from the *left-menu*.

The screenshot shows the 'GrantSolutions System Configuration' page for 'Non-Competing Offsets'. The page includes a navigation menu with options like 'Data Reference', 'Org/User Management', 'Grants Workload Management', 'System Configuration', 'System Security', and 'GATES Management'. The 'System Configuration' sub-menu is active, showing 'Text Configuration', 'Form Letter Templates', 'Hash Checking', 'Offsets', 'Task Message Due Dates', 'Password Management', and 'ERI Management'. The 'Offsets' section is selected, displaying configuration options for various stages: Pending, Ready, Inactive, Fed Life, In Progress, Due Range, and Application Due Date. Each option has a text input field for a number and a dropdown menu for 'Days' or 'Months'. The 'Application Due Date' is set to 90 Days. 'Save Changes' and 'Cancel' buttons are at the bottom.

Figure 6. 10 Non-Competing Offsets.

- Enter the number of days/months in the text field.
- Select the days/months from the *drop-down* list.
- Click the **Save** button.

CLO Offsets

To set the CLO Expiration Date Delays:

- Select the **System Configuration** option from the Main Menu.
- Select the **Offsets** option from the Sub-menu.
- Select the **CLO** link from the *left-menu*.

The screenshot shows the 'GrantSolutions System Configuration' page for 'CLO Offsets'. The navigation menu is the same as in Figure 6.10. The 'Offsets' sub-menu is active, and the 'CLO' link is selected. The configuration options are simpler, with a single 'CLO Delay Expiration Date' set to 30 Days. 'Save Changes' and 'Cancel' buttons are at the bottom.

Figure 6. 11 CLO Offsets.

FPAR Offsets

To set the FPAR reminder dates:

- Select the [System Configuration](#) option from the Main Menu.
- Select the [Offsets](#) option from the Sub-menu.
- Select the [FPAR](#) link from the *left-menu*.

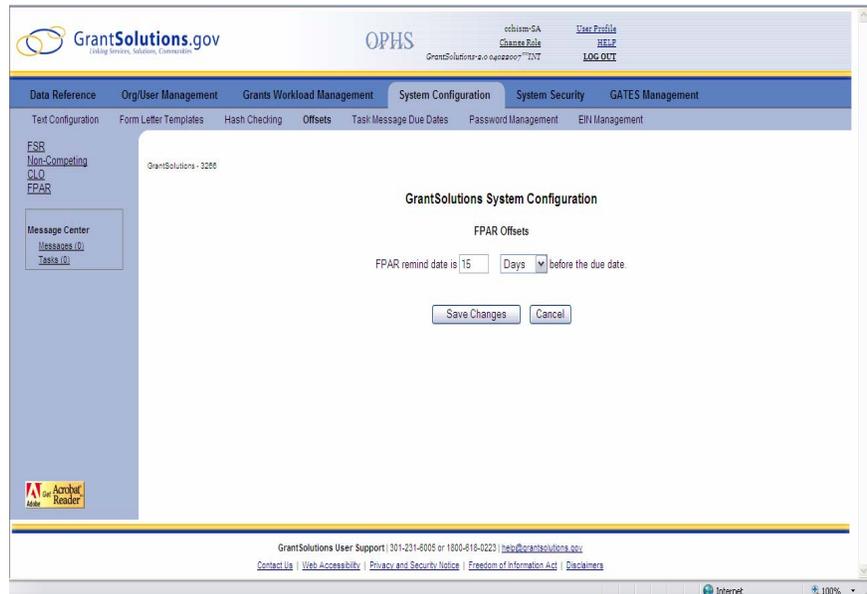


Figure 6. 12 FPAR Offsets.

Task Messages

Funding Memo

To set the Task Message due dates for the Funding Memo:

- Select the [System Configuration](#) option from the Main Menu.
- Select the [Task Message Due Dates](#) option from the Sub-menu.
- Select the [Funding Memo](#) option from the *left-menu*.

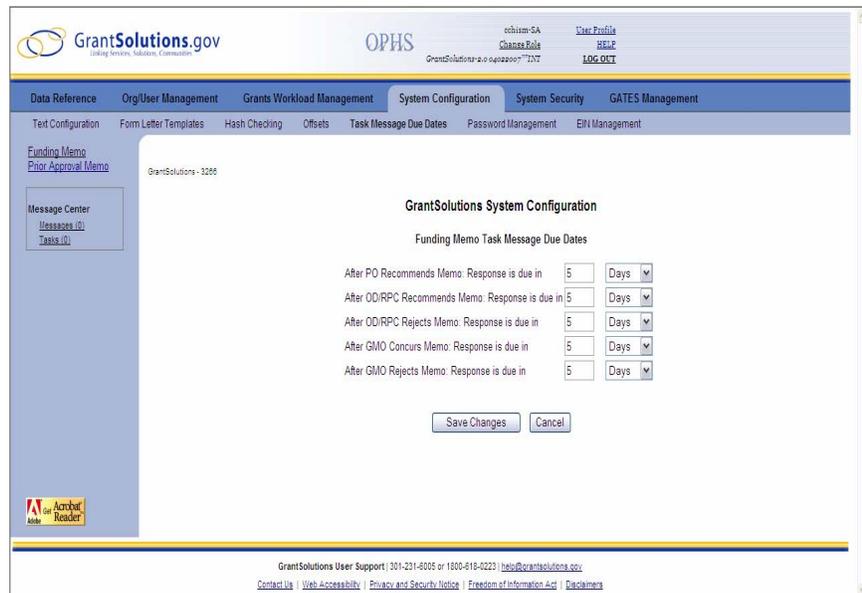


Figure 6. 13 Funding Memo Task Message Due Dates Screen.

Prior Approval Memo

To set the Task Message due dates for the Funding Memo:

- Select the [System Configuration](#) option from the Main Menu.
- Select the [Task Message Due Dates](#) option from the Sub-menu.
- Select the [Prior Approval Memo](#) option from the *left-menu*.

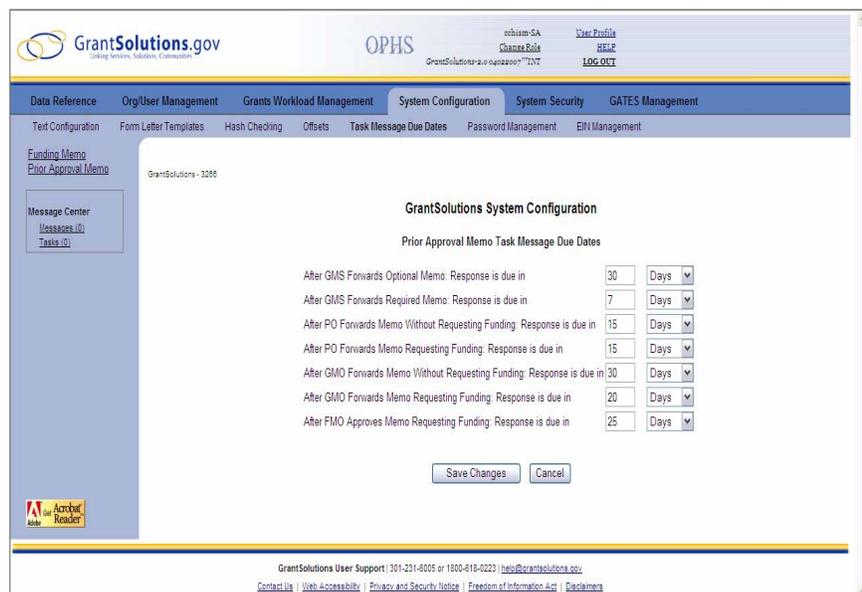


Figure 2. 1 Prior Approval Memo Task Message Due Dates Screen.

Password Management

To manage system notices for GrantSolutions user passwords and to ensure unauthorized user access:

- Select the [System Configuration](#) option from the Main Menu.
- Select the [Password Management](#) option from the Sub-menu.

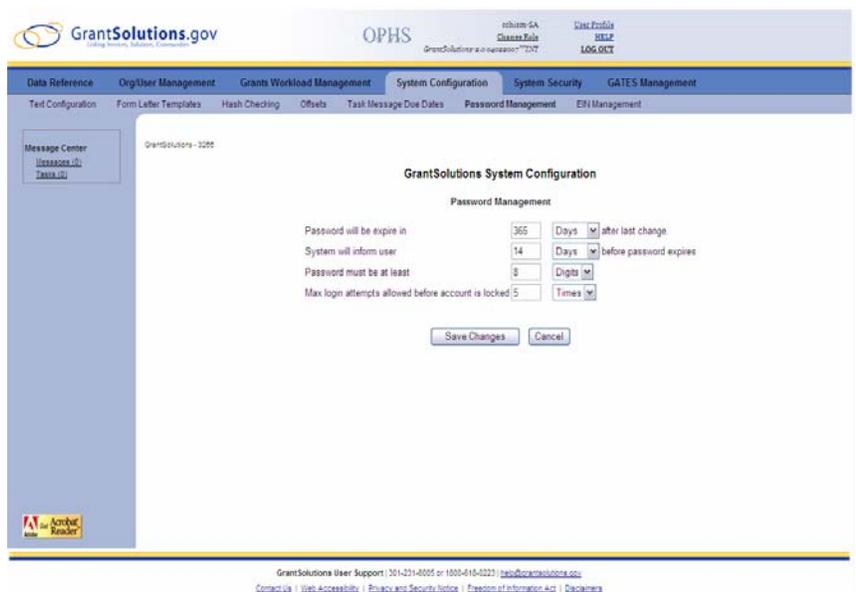


Figure 6. 14 Password Management.

EIN Management

The Employer Identification Number (EIN) is assigned by the United States Internal Revenue Service to uniquely identify an organization.

To access:

- Select the [System Configuration](#) option from the Main Menu.
- Select the [EIN Management](#) option from the Sub-menu.

The screenshot shows the 'EIN Management' interface. At the top, there are navigation tabs: Data Reference, Org/User Management, Grants Workload Management, System Configuration, System Security, and GATES Management. Below these are sub-tabs: Text Configuration, Form Letter Templates, Hash Checking, Offsets, Task Message Due Dates, Password Management, and EIN Management. The main content area is titled 'EIN Management' and contains a search form with the following fields: EIN (text), EIN Name (text), EIN Address (text), EIN City (text), EIN State (dropdown menu with '-Please select a state-'), EIN Zip (text), EIN Region (dropdown menu with '-Please select a region-'), EIN Country (text), EIN Congressional District (text), and EIN MSA Identifier (text). There are radio buttons for 'Show Deleted Items Only' with options 'Yes' and 'No'. A 'Search' button is located below the form. Below the search button, there is an 'Add' link and a table with the following columns: EIN Name, Address, City, State, Zip, Region, Country, Action. The table currently displays the message 'No EIN Selected for the search criteria you entered'. A 'Close' button is located below the table. A blue oval highlights the 'Search' button.

Figure 6. 15 EIN Management Screen.

Performing a Search

To view or edit an EIN, a search must be performed. The search can be executed by using one or a combination of parameter fields located at the top of the screen.

Once the criteria has been entered:

- Click the **Search** button.

NOTE: Search criterion is case insensitive.

Adding an EIN

To add and EIN:

- Select the [Add](#) link

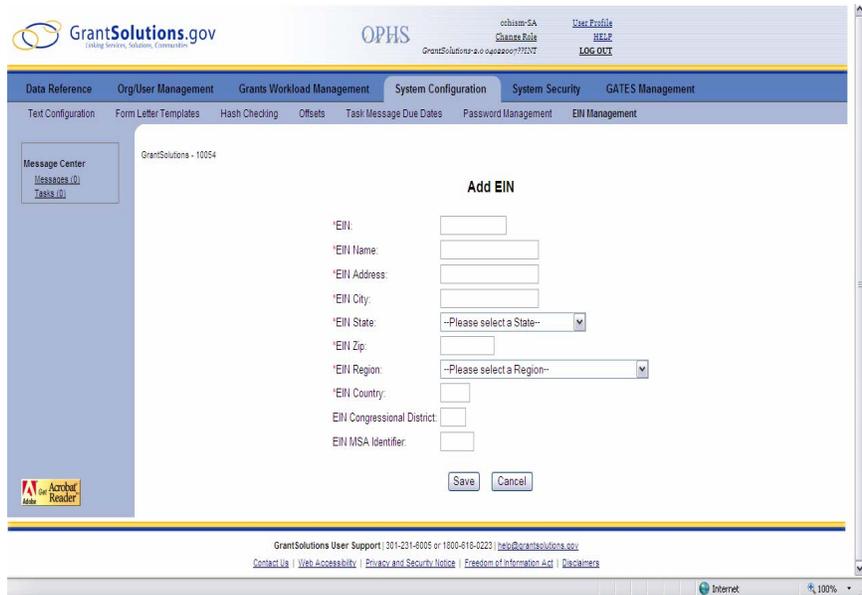


Figure 6. 16 Adding an EIN.

Gates Management

GATES ETL (Extract, Transform, and Load) module developed for bridging data from the legacy GrantSolutions System to GATES by extracting GrantSolutions data and loading the extracted data into GATES database once an NGA is issued in GrantSolutions. (SQL Data warehouse function)

ETL Queue

To access:

- Select the [GATES Management](#) option from the Main Menu.
- Select the [ETL Queue](#) option from the Sub-menu.

The screenshot displays the ETL Queue interface within the GrantSolutions.gov system. The page header includes the GrantSolutions.gov logo, the user's name (OPHS), and navigation links for User Profile, Change Role, and Logout. The main navigation bar shows the current path: Data Reference > Org/User Management > Grants Workload Management > System Configuration > System Security > GATES Management > ETL Queue.

The ETL Queue section shows the following information:

- ETL Queue**
- Last Run: 01/01/4000 12:00 AM
- Next Run: 01/01/4000 12:00 AM
- Last Run: 01/01/4000 12:00 AM
- Next Run: 01/01/4000 12:00 AM
- Refresh button

Below this information is a table with 8 records displayed. The table has the following columns: Date/Time Submitted, Grant Number/Issued, Project Title, Status, and Action.

Date/Time Submitted	Grant Number/Issued	Project Title	Status	Action
09/07/2006 11:30 AM	FPHPA070008	Family Planning Services Grant	CANCELLED 12/29/2006 12:11 PM	Process Immediately Re-Submit ETL
09/07/2006 11:30 AM	CPIMP041005	Community Programs to Improve Minority Health	CANCELLED 12/29/2006 12:11 PM	Process Immediately Re-Submit ETL
08/25/2006 03:57 PM	ICMHP000001	CORE SUPPORT FOR SELECTED BOARDS FOR THE IAS	SUBMITTED 01/24/2007 09:34 AM	Process Immediately Cancel Submission
12/27/2006 04:03 PM	FPHPA040006	2006 FPH (Miami, Florida)	SUBMITTED 12/27/2006 04:03 PM	Process Immediately Cancel Submission
12/28/2006 02:23 PM	FPHPA030326	Title X, Family Planning Services Program - Family Planning Clinical Services, Education and Community Information	SUBMITTED 01/09/2007 10:47 AM	Process Immediately Cancel Submission
01/04/2007 10:29 AM	FPHPA030062	Title X, Family Planning Services Program	SUBMITTED 01/04/2007 10:29 AM	Process Immediately Cancel Submission
01/04/2007 10:37 AM	FPHPA060898	State Coordinated Family Planning Project - Title X	SUBMITTED 01/04/2007 10:37 AM	Process Immediately Cancel Submission
01/08/2007 02:14 PM	APHPA060205	2005 Adolescent Family Life Demonstration Projects	SUBMITTED 01/08/2007 02:15 PM	Process Immediately Cancel Submission

At the bottom of the table, there is a 'Refresh' button. The footer of the page contains contact information for GrantSolutions User Support and links for Web Accessibility, Privacy and Security Notice, Freedom of Information Act, and Disclaimer.

Figure 7. 1 ETL Queue Screen.

ETL Log

To access:

- Select the [GATES Management](#) option from the Main Menu.
- Select the [ETL Log](#) option from the Sub-menu.



Figure 7. 2 ETL Log Screen.

Index

---H---

Help Desk. . .9

---I---

Inactive User Accounts. . .32

---L---

Logging in. . .5

---M---

Message Center. . .6

---S---

Screens. . .Also see Competing and
Non-Competing Screens
Message Center. . .6
Welcome Screen. . .5

---T---

Troubleshooting
Cannot send an email message to
the Help Desk. . .9
Forgot my password. . .5
Selecting the email link does not
work. . .9
Why so many Messages in my
Outbox. . .8