

About Grants Online: Grants Online operates in a web environment, and can be accessed anywhere at anytime provided that you have Internet access. You will be required to use an Internet browser to log in and to use Grants Online. **Internet Explorer** is the preferred browser for **PC users**; **FireFox** is the preferred browser for **MAC users**. No software is required for installation. Logins and passwords are required. If you do not have a password, you can contact the Grants Online Help Desk for assistance in obtaining your login credentials. As a recipient of a NOAA grant, you can use the Grants Online system to manage your post-award grants activities. Grants Online allows recipients to: Accept Awards electronically, Manage user roles for individuals within their organization, Submit post-Award action requests and Performance Progress reports, and Correspond with your NOAA Program Officer and Grant Specialist.

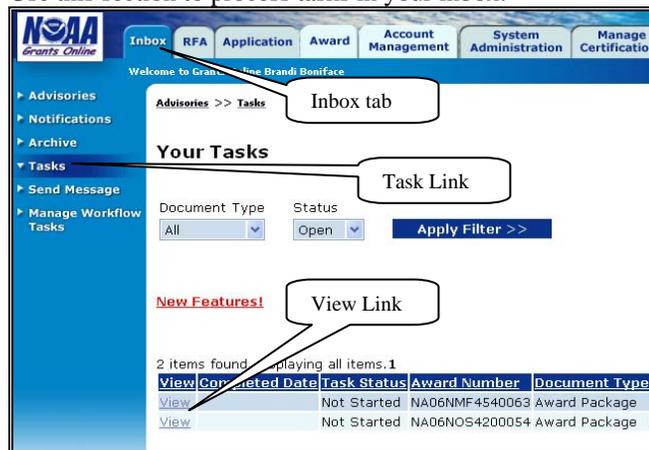
For more information, e-mail GrantsOnline.HelpDesk@noaa.gov or call the Help Desk at 301-444-2112 or toll free at 1-877-662-2478 between the hours of 8:00 am and 6:00 pm Eastern Time Monday through Friday excluding Federal holidays.

Warning: Avoid using the browser “Back” button in Grants Online; it will log you out of Grants Online.

Processing a Task in your Inbox

The Grants Online system allows users to process actions using a workflow design. Workflow provides the technical mechanisms to assign task(s) to the appropriate user based on the roles and organizations assigned to the user’s profile. Users that have task(s) in their inbox are allowed to take action on the task or modify the documents associated with the task.

Use this section to process tasks in your inbox.

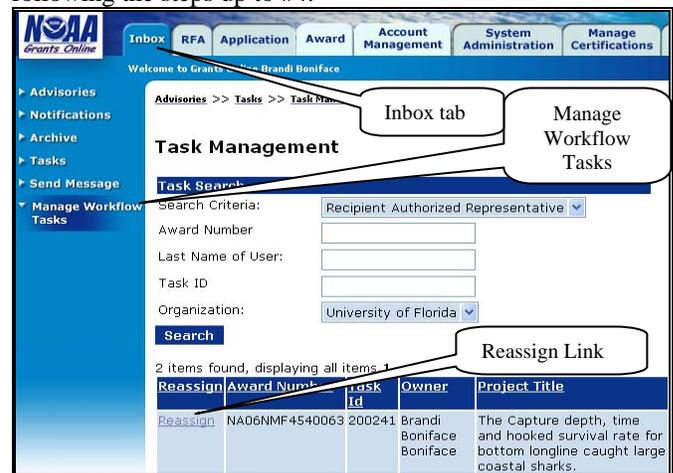


1. Click the “Inbox” tab.
2. Click the “Tasks” link.
3. Click the “View” link next to the task you wish to process.
4. The Launch page is displayed for the corresponding document task selected. Select the action you wish to perform from the action dropdown menu and click the “Submit” button. **NOTE:** The actions available to select from are task dependent.

Reassigning a Task

Use these steps to reassign a task between users in the same organization. Both users must be affiliated with the same organization and have the same user role in Grant Online.

You can also search for open tasks in your organization by following the steps up to #4.



1. Click the “Inbox” tab.
2. Click the “Manage Workflow Task” link.
3. From the Search Criteria dropdown menu, select “Recipient Auth. Rep”. If you wish to view tasks belonging to other recipient roles you can select the appropriate role in this dropdown list.
4. Click the “Search” button, located in the bottom portion of the main window.
5. From the search results, select the “Reassign” link next to the task you wish to reassign.
 - a. The “Search Users” page is displayed for you; enter the last name of the user you wish to reassign the task to in the Last Name field and click the “Search” button.
 - b. Press the “Select” link next to the name of the user that will have the task reassign to them.
 - c. The “Task Management” page is displayed for you to confirm your request. Select the “Yes” button to complete your request and the “No” button to cancel the request.

Accepting an Award

NOTE: This action can only be performed by users that have the Recipient Authorized Representative role.

Use the steps below to accept a grant awarded to your organization.

1. Follow the steps 1 through 3 listed under **Processing a Task** in this document, and then follow the steps listed below.
2. The “Award Package” launch page is displayed. Select an action from the Action dropdown menu. You will have several options to choose from: “Accept Award”, “Decline Award”, “Return to NOAA for Revisions”, or “View Award Details”.
3. To accept the award
 - a. Select “Accept Award” from the dropdown menu and click the “Submit” button. The Accept Award page is displayed.
 - b. On the Accept Award page, scroll to the bottom of the page and verify the Recipient Administrator Information. If the “Recipient Administrator Information” is blank, you will have to contact the Grants Online Help Desk.
 - c. Click the “Save” button located at the bottom of the page.

Note: The Recipient Administrator selected above will receive the “Manage Award Users” task. This task will allow the administrator to assign or add users to the award.

Manage Award Users

1. Follow the steps 1 through 3 listed under **Processing a Task** in this document, and then follow the steps listed below.
2. In the Action box, go to the drop-down menu and select “View Manage Award Screen” and click “Submit”.
3. On the next screen click on the link “Add another Investigator” to select the PI for this award.
4. On the “Recipient Search” screen find the user who will be the PI on this award and click the “Select” button to the far right of their name. (If the PI’s name is not listed, use the “Add a new user” link at the bottom of the screen to add them into the system.)

5. You will be returned to the previous screen. Scroll to the bottom and click the “Done” button.
6. In the Action box, go to the drop-down menu and select “Manage Award Complete” and click “Submit”.

Printing the Award Acceptance Letter

Use the steps below to view and print the CD450. Prior to grantees accessing Grants Online, this document was received by mailed.

1. Click the "Award" tab.
2. Click the "Search Awards" link. The “Search Award” page is displayed.
3. Input your Award number and click the “Search” button on the “Search Awards” page. When your search results populate, click the award number, which you are attempting to view. **NOTE:** You can enter the award number to limit the search results to a specific award or you can leave the search criteria blank for all of the awards you have access. DO NOT use the “Applicant Name” search criteria.
4. The “Grants File” launch page is displayed. Scroll down to the Sub Documents section and select the Award Package ID number.
5. The “Award Package” page is displayed. Select the “Go to Award Package Detail Page” link.
6. Scroll to the bottom of the page and click the “CD450 Report” button. The “Financial Assistance Award” page is displayed in Adobe for you to review and print.

Submitting & Reviewing an Award Action Request (AAR)

1. Click the "Award" tab.
2. Click the "Search Awards" link. The “Search Awards” page is displayed.
3. Input your Award number and click the “Search” button on the “Search Awards” page. When your search results populate click the award number, for which you are submitting your AAR.
4. On the “Grants File” launch page, select the “Create Award Action Request” action from the action dropdown menu then click the “Submit” button.

5. The “Award Action Request Index” page is displayed with the available AARs. Click the link to the AAR that you wish to submit, the requested page will be displayed for you to complete. Enter the required fields and click the “Save” button.
6. The AAR page is re-displayed with the attachment link and other fields. You can upload documents. After completing the required information, click the “Save and Return to Main” button. Another message will display where you can confirm your request and start workflow, click the “Yes” button.
7. A review task is sent to your “Task” inbox for this request. Follow the steps listed under the **Processing a Task** in this document. The review task will go first to the creator of the document and then to the Recipient Authorized Representative(s) in the organization. If you have the role of “Recipient Authorized Representative” you will have to submit the request to NOAA, thus you will have processed two tasks.

Submitting a Performance Progress Report

1. Click the "Award" tab, located across the upper portion of your Grants Online page.
2. Click the “Search Report” link located on the left hand side of the page.
3. The “Search Financial and Performance Progress Reports” page is displayed. On this page, click the “Search” button to retrieve all reports available to you. In order to limit your selection to specific reports, populate the search criteria and click on the “Search”.
4. In the search results, locate and click on the “Progress Report” you wish to complete. The “Performance Progress Report” detail page is displayed.
5. On this page, you can enter the report in the text box above the “Spell Check” button or you can attach your report. The Federal Program Officer is the authority on the acceptable form and content of Progress Reports. *** Large attachments may not upload; try to limit your attachments to fewer than 10 megabytes.
6. To upload attachments
 - a. Scroll to the bottom of the page and click the “Attachment” link.
 - b. Click the “[+]” link
 - o Another section will display to allow you to search your computer for the file.
 - o Click the “Browse” and follow the prompts.
 - o You must fill in the “Description” field with a short description of the attachment. NOTE: If you do not enter a description, the attachments will not save.
 - o Click the “Save Attachment” button and the attachment is uploaded to Grants Online.

7. To start workflow, click the “Save and Return to Main” button. Another message will appear confirming that you want to start workflow, click the “Yes” button.
8. A review task is in your “Task” inbox for this request. Follow the steps listed under the **Processing a Task** in this document. The review task will go to the creator of the document and the Recipient Authorized Representative(s) in the organization. If you have the role of “Recipient Authorized Representative” you will have to process two tasks to submit the request to NOAA.

Adding/Editing your organization users

NOTE: This action can only be performed by users that have the System Administrator Role.

1. Click the "Award" tab, located across the upper portion of your Grants Online page.
2. Click the “Manage Recipient Users” link located on the left hand side of the page.
3. Select your organization from the dropdown menu.
4. Click the “Show” button and the list of users in Grants Online for the organization selected is displayed.
5. To update a user’s access follow the steps below:
 - a. Click the “Manage Award Access” link located across from the user you are updating.
 - b. Select or deselect the appropriated checkbox(s) for the access you want to grant to the user.
 - c. Click the “Assign” button at the bottom of the page to complete the changes and then click the “Cancel” button to return to the previous page.
 - d. To deactivate a user, click the “Disassociate” button at the bottom of the page and then click the “Cancel” button to return to the previous page.
6. To activate a user without a username follow the steps below:
 - a. Click the “Edit Profile” link located across from the user you are updating.
 - b. Verify the user’s information listed on the Edit Profile page: First and Last names, e-mail address, and phone. Make correction as needed.
 - c. To generate the user’s username you will have to click the “Generate Username” button. The username is a combination of the first initial of the first name and the entire last name.
 - d. Populate the security question and answer, as these fields are required.
 - e. Click the “Save” button. If there are no errors the user name is created, otherwise you will have to make the needed corrections.
7. To add users to the organization follow the steps below:
 - a. Click the “Add Another User” link at the bottom of the “Manage Recipient Users” page.

- b. Enter the required fields with the user's information on the Edit Profile page: First and Last names, e-mail address, and phone.
 - c. To generate the user's username you will have to click the "Generate Username" button. The username is a combination of the first initial of the first name and the entire last name.
 - d. Select a user's role from the "User Role" dropdown list.
 - e. Populate the security question and answer, as these fields are required. If the information is not available, uses "XXX" in both fields.
 - f. Click the "Save" button. If there are no errors the user name is created, otherwise you will have to make the needed corrections.
- NOTE:** The username displayed on this page is also the default password for the user. To change the user's access use step #5 in this section. The System Administrator should notify the user of their username and password once the account is created.
8. To unlock a user's account or reset the user's password follow the steps below:
 - a. Click the "Edit Profile" link located across from the user you are updating.
 - b. To unlock a user account:
 - o Click the "Unlock Account" button on the Edit Profile page. This will unlock the account; normally a user's account is locked after 3-consecutive unsuccessful attempts to log into the Grants Online system with the same username.
 - c. To reset a user password:
 - o Click the "Reset Password" button on the Edit Profile page. A confirmation button is displayed.
 - o Click the "Yes" button to continue with the resetting of the user's password. The user's new temporary password is displayed on the screen. Please provide this password to the user.
 - o Click the "No" button to cancel the request.

General Navigation Guide

Grants Online uses a "Tab" style of page formatting. There are tabs across the top of the web site providing general categories of features. Each tab contains its own page. Under each tab are links to items related to that page. These are shown down the left-hand column of the page, and for most pages are also listed on the main page when the tab is clicked. The same user interface is presented for all users. Recipients only have access to the Inbox, Award, Account Management, and Help Tabs. The other tabs are for the use of internal NOAA users and are grayed-out for recipients. Clicking on one of these tabs gives a brief error message. Each active tab and its links are described here:

Inbox Tab:

- o Advisories – This page is always the first page displayed after successful login and acceptance of use conditions. Please review any advisories directed towards recipients.
- o Archived Notifications – Notifications that were originally under the Notifications link, but chosen for archiving. Archived notifications may be deleted from the system.
- o Notifications – Notifications are sent to recipients as internal messages (shown here) and external email messages. They may be viewed, deleted, or archived from this window. Additionally, clicking the View Task link will bring the user to the related document. It says "View Task" because most notifications are related to a task that the user has open or has already acted upon.
- o Send Message – Provides a means of sending an email message to another user of Grants Online.

Use this sparingly because the message will be sent from GrantsOnlineQandA@noaa.gov. If you send a message using this facility, please make sure to identify yourself and your return email address. You **MUST** use the "Search" button to find your message recipient.

- o Task Management – This allows tasks to be reassigned between users. For tasks to Recipient Authorized Representatives (RAR), only the "Accept/Decline Award" task originally goes to one person and is an immediate candidate for reassignment. The rest of the RAR tasks go to all RARs. The tasks are cancelled for other RARs when one RAR chooses to "View Details" in the workflow action section of the related document launch page. Once a single RAR is identified with a document, that same person will receive future workflow tasks for that document unless reassigned through the Task Management window. See **Reassigning a Task** on Page 1.
- o Tasks – Most users generally navigate to this section immediately after viewing the Advisories. All tasks assigned to a user are shown here. For successful submission of documents or acceptance of awards/amendments, these tasks must be completed. See **Processing a Task** on Page 1.

Award Tab:

- o Manage Recipient Users – Only Recipient Administrators (RA) have this link. This link allows RAs to provide access to their own recipient users to Grants Online. See

Adding/Editing your organization users on Page 3.

- Search Awards – Clicking the Search button without entering any parameter information will return all recipient awards. Each returned award has a link to allow navigation to its Grants File Launch Page.
- Search Reports – Federal Financial Reports and Project Progress Reports can be found here. Each report has a navigation link to its launch page.

Account Management Tab:

- My Delegations – You can “delegate” your inbox to other users. The “Find Peers” button will only find other users in your organization with the same or greater privileges. If another person is your “delegate”, they will be given the option to

work as themselves or as your delegate. When they choose to work as your delegate, they will see your inbox tasks and have the ability to act on your behalf. When they act as your delegate, the workflow history will show “John Smith acting as delegate for Jane Doe”.

- My Preferences – Change the look and feel of your Grants Online experience here. Recipient Users should never uncheck the Email Inbox. Only internal users who have Grants Online up all day every day should choose not to receive email notifications.
- My Profile – Change your password, set your security question/answer, or update your email and other personal information here.



Grants Online

Grantees – Quick Reference Guide

Grants Online Grantee User Roles and Definitions	
User Role	Definition
Recipient Authorized Representative	Recipient Authorized Representative users are individuals with signature authority who sign official grant documents such as an SF-424 (application), or countersigns an Award document such as a CD-450 (new Award) or CD451 (amendment). More than one person can have this role at any organization; however on each Award one person will be designated the primary “Authorized Representative”.
Recipient Administrator	Recipient Administrator users have the permissions needed to set up other people in their organization as users of the Grants Online system and to give them access to specific awards as appropriate.
Business / Financial Representative	Business/Financial Representative users are able to initiate Award Actions Requests and fill out Federal Financial Reports in Grants Online but cannot submit them directly to NOAA. Instead they will be sent to the Authorized Representative for their organization.
Business / Financial Representative - Submitting	Business/Financial Representative - Submitting role is the same as the Business/Financial Representative Role, except users with this role are allowed to submit Financial Reports directly to NOAA.
Principal Investigator	The Principal Investigator role is assigned to the PI and Co-PI in an organization. Users with this role can initiate Award Actions Requests and fill out Project Progress Reports but cannot submit them directly to NOAA. Instead they will be sent to the Authorized Representative for their organization.
Principal Investigator - Submitting	The Principal Investigator - Submitting role is the same as the Principal Investigator Role, except users with this role are allowed to submit Project Progress Reports directly to NOAA.
Key Personnel	Persons with the role of Additional Key Personnel will be able to view the Awards for their organization; they can also initiate Award Action Requests, but they will be sent to the Authorized Representative for their organization.

*** More than one user can have the same role and each user can have more than one role.

Grants Online Grantee User Roles and Functionality							
Role / Functionality	Recipient (System) Administrator	Recipient Authorized Representative	Recipient Business/Fin Representative	- Submitting	Recipient Investigator (PI/Co-PI)	- Submitting	Recipient User (Additional Key Personnel)
View/Access All Awards for Organization	X	X	X				
View/Access Only Assigned Awards					X		X
Manage Organization User Profiles	X						
Manage Organization User System Access	X						
Reassign Tasks	X	X					
Initiate Award Action Requests	X	X	X		X		X
Initiate Financial and Progress Reports		X	F		P		
Submit Award Action Requests		X					
Submit Financial and Progress Reports		X		F		P	

Useful Links:

<https://grantsonline.rdc.noaa.gov/flows/home/Login/LoginController.jpf> - Use this link to access the Grants Online’s logon page.

<http://www.ofa.noaa.gov/~grantsonline/FAQ.html> - This is the Grants Online’s Frequency Asked Questions page, in the grantee section of the page, you can review answers to the most commonly asked questions by grantees.

http://www.ofa.noaa.gov/~grantsonline/gol_training.html - This is the Grants Online’s Training page, on this page you can locate grantee’s training documents and detailed **user manuals**. The user manuals provide the detail steps needed to perform any action in Grants Online.

http://www.ofa.noaa.gov/~grantsonline/whats_new.html - This is the Grants Online’s “What’s New” website link, on this site you can stay up-to-date on Grants Online changes and meetings.

<http://www.ago.noaa.gov/grants/grantees.shtml> - This is the Grants Management Division’s Grantees website link, on this site you can obtain information and forms associated with submitting financial data including **drawing down funds**.

