Oklahoma
OFFICE OF STATE FINANCE

OK.GOV OKGRANTS

OCAST Subgrantee Manual

OKGrants

Version 1.0

September 2011

Contents

1. System Requirements

OKGrants was designed so that the vast majority of computer users will be able to use the system with little or no changes to their computer environment. The four requirements that are mentioned below are common computer elements that should be already present on most machines.

1.a. Operating System

OKGrants was designed for both of the two most common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing the system from a Macintosh environment are required to have MacOS 7.5 or higher running on a PowerPC processor. Windows users are required to have an operating system that is Windows 95 or higher.

1.b. World Wide Web Connection

OKGrants is a web site designed for and accessed via the Internet. The Internet is the more general term that is typically used to refer to the World Wide Web. The World Wide Web consists of a vast array of content that is accessible via a web browser. For the purpose of accessing OKGrants, the standard Internet connection is via a modem connection. A modem is a piece of hardware that connects to the computer to send data through a phone line to and from the computer. Internet connections that are "faster" than a modem connection, such as cable and DSL, will improve the speed at which the system operates, but are not necessary in order to use the system. If you are in an office environment, you may already have an Internet connection, but if you are unsure, please contact your organization's network administrator.

For those using a dial-up connection over a modem, it is highly recommended that you have a modem connection speed of at least 33.6 kbps (kilobits per second).

1.c. Web Browser

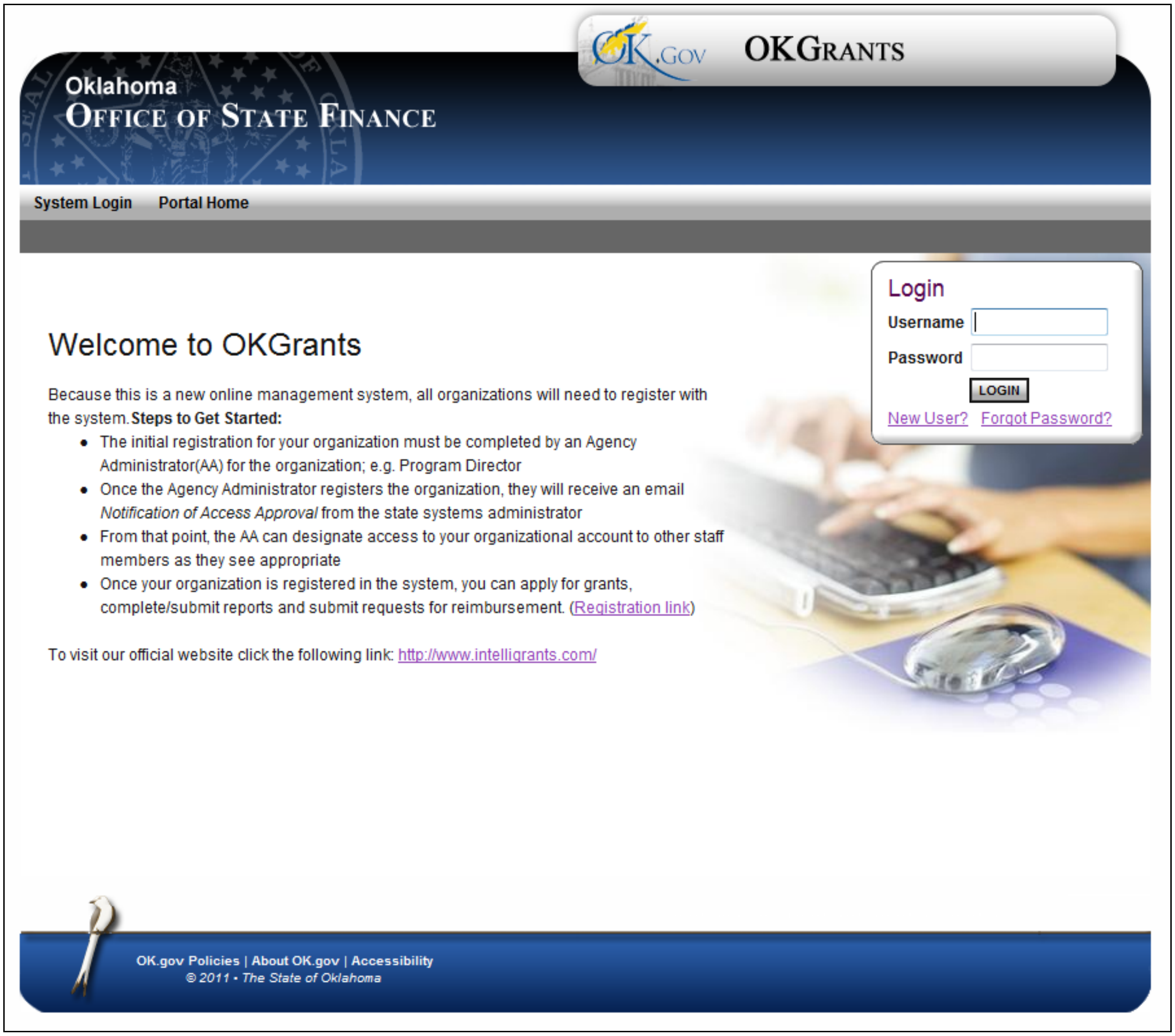
This system was designed to be compatible with common up-to-date web browsers including Internet Explorer, Firefox, Safari, and Opera.

1.d. Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat Reader you may choose to view, print, or save these documents. If you do not have Adobe Acrobat Reader you can go to www.Adobe.com and download it for free.

2. OKGrants Homepage

To access OKGrants, type https://grants.ok.gov into the address bar of your web browser and hit "Enter". The page you see should look like the image shown below.



2.a. Browser Configuration

In order to avoid various browser-related restrictions unnecessarily placed on OKGrants, please make the following configuration changes for the web-browser that you are using.

Internet Explorer

If you are using Internet Explorer, it is recommended that you add the OKGrants homepage to your list of trusted sites. To do this, please complete the following steps:

1. Click "Tools"

2. Click "Internet Options"
3. Click the "Security" tab
4. Click "Trusted Sites"
5. Click the "Sites" button
6. In the "Add this Web site to the zone:" textbox type “grants.ok.gov” and then click the "Add" button
7. Click the "OK" button, and then click the "OK" button again

3. Applicant User Types

There are four security roles defined for OKGrants users: Agency Administrators, Authorized Officials, Fiscal Officers, and Writers. These roles have different security access to work on the applications. Once the Agency Administrators are identified and their new user accounts created, the Agency Administrators will select and enter their own organization's staff names to access OKGrants. Each security role is summarized below, the first name is the name used in the statewide OKGrants system, the name in parentheses is the OCAST role it corresponds to:

- **Agency Administrator (Contract Official)**
    - Must approve the application before it can be submitted.
    - Is the only role with access to My Organization links.
    - Has access to view and edit all applications for the organization.
    - Is linked to all project numbers associated with the organization.
- **Authorized Official (Principal Investigator)**
    - Is the only role that may submit a Statement of Intent and an Application.
    - Is linked to the specific project number (cannot see other applications associated with the organization).
- **Financial Officer (Fiscal Agent)**
    - Has access to view the application.
    - Is linked to the specific project number (cannot see other applications associated with the organization).
    - This role will come into play when the Request for Payment is developed. This role will have access to view, edit, and submit the request.
- **Writer (Co-Principal Investigator, Signor for Additional Applicant Organizations)**
    - Has access to view the application.
    - Is linked only to the specific project number (cannot see other applications associated with the organization).

Security Roles	Controls Access to Organization	Controls Access to Application	Read	Write	Initiate Application	Submit Application	Cancel Application
Agency Administrator	X	X	X	X			
Authorized Official		X	X	X	X	X	X
Financial Officer			X	X			
Writer			X	X			

4. User Access in OKGrants (Agency Administrators Only)

In order to use the system you must create a user account. There are two ways to get access to OKGrants.

If you are an:

Agency Administrator: Request access to the system and get approved by an OKGrants System Administrator.

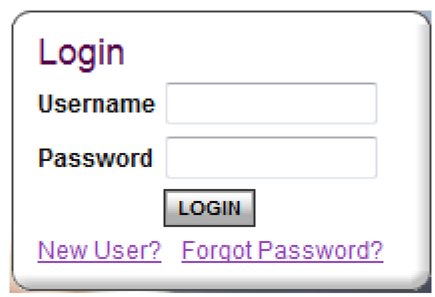
All other roles: Request access from/be added by the organization's Agency Administrator.

As Agency Administrator for the organization you must first obtain access by following the procedure under section 4.a. Once you have obtained access to OKGrants, you can manually add additional organization members as described in section 4.b. Both processes for gaining access are described below.

4.a. Gaining access as an Agency Administrator

If your organization doesn't already exist in OKGrants, you must create a new user account. If the organization is already in OKGrants, then request access through your Agency Administrator.

To create a new user account:



1. From the OKGrants homepage click the "New User?" link located in the "Login" section.
2. Complete the user form in its entirety.
    a. Fill in all information as required. All items marked with an '*' are required to create your account.
    b. The "Username" field must consist of all letters and numbers.
    c. The "Password" field must consist of all letters and numbers and must be at least 7 characters long.
    d. The fields "Password" and "Confirm Password" must be the same.
3. Click "Save" to save the data.

NOTE: Once you have created a user account and gained access to the system, you will never have to request access again. There is no need to create a separate user account for each organization you manage within OKGrants.

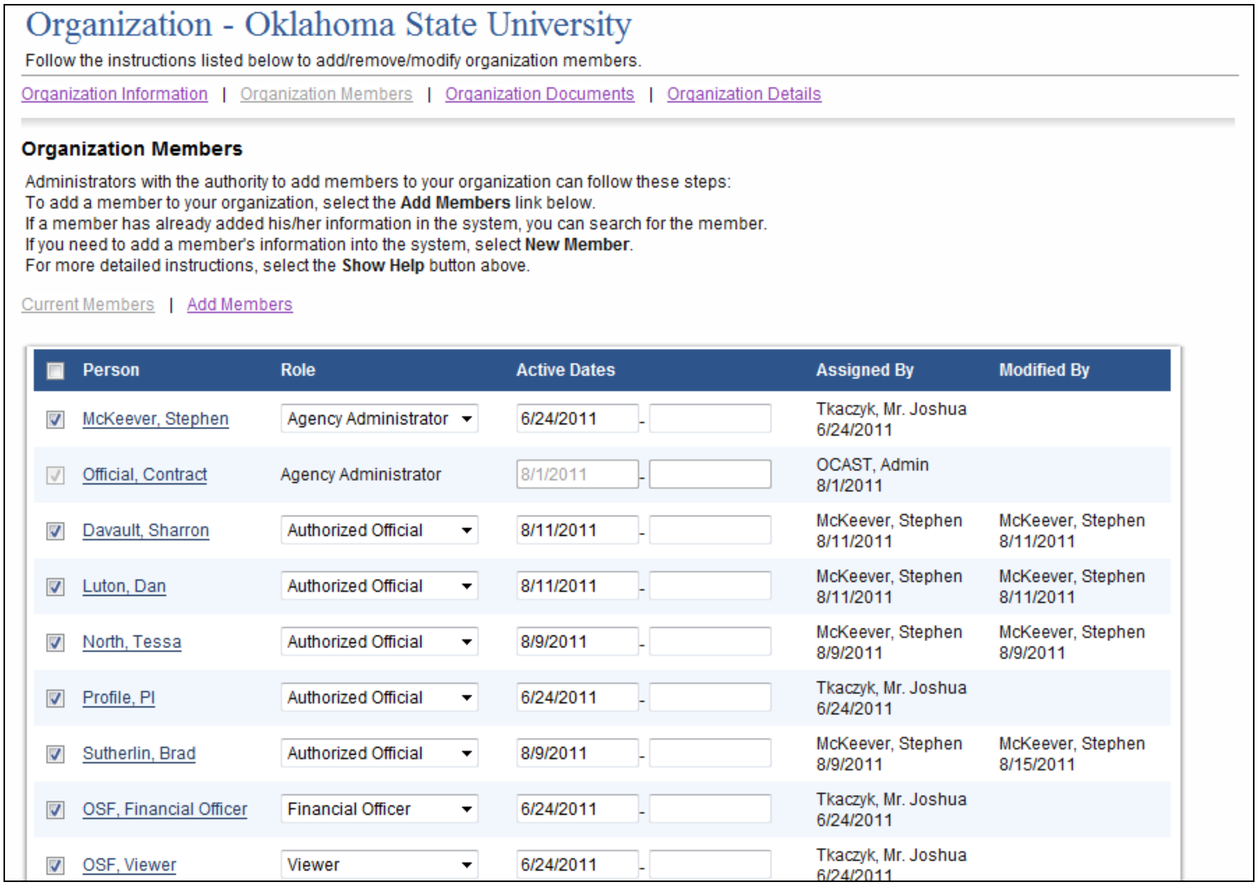
After creating your user account you must then be approved by an OKGrants System Administrator before you can access the system. If you attempt to access the system prior to getting approved/validated by a system administrator you will receive the following message:

When access has been granted to you by a system administrator you will receive an email message confirming that your account has been validated.

4.b. Granting access to all other users

Once you have been granted access to the system, you may add all other users for their organization.

1. You must first log in to the system and then select the organization you would like to add this new user to. Select the “My Organization(s)” link at the top of the page. Some Agency Administrators may be members of multiple organizations and each organization would be listed here. Select the name of the organization to wish to add a new user to.
2. This is the Organization page. Click the “Organization Members” link above the Organization Information section. The “Current Members” tab will be active and it will list the various members of the Organization. If the person whose account must be added is not shown, click the “Add Members” link.

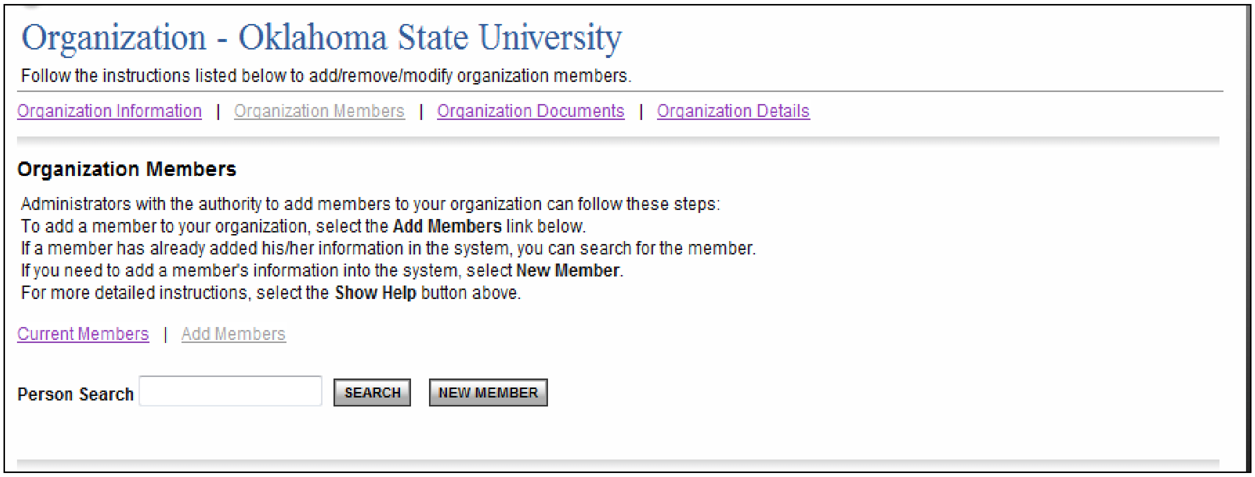


3. After clicking the “Add Members” tab, first search for the person who you want to add by typing in part of the user’s name into the “Person Search” box and then by clicking the “Search” button.

    a. If the user already exists within OKGrants he or she will be shown below the search box. Check the box next to the user, assign a user role and indicate the date the user was activated within OKGrants. Click the “Save” button in order to add the user to your organization.

    b. If no users were found that matched the search criteria then proceed to step 4.

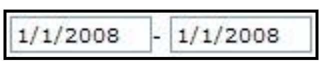
4. If the user doesn’t exist in the system, click the “New Member” button. Fill in all information as required. All items marked with a ‘*’ are required to add a new member. When the information has been entered click the “Save & Add To Organization” button.



4.c. Deactivating a user in the Organization

An Agency Administrator from an organization may choose to deactivate a member of the organization. A deactivated user will no longer be able to view any application related information for the organization. Deactivate a member of an organization by following these steps:

1. Click the “My Organization” link on the menu bar.
2. Click on the “Organization Members” tab.
3. Change the second active date in the system to a date in the past for the user requiring deactivation and then click the “Save” button.

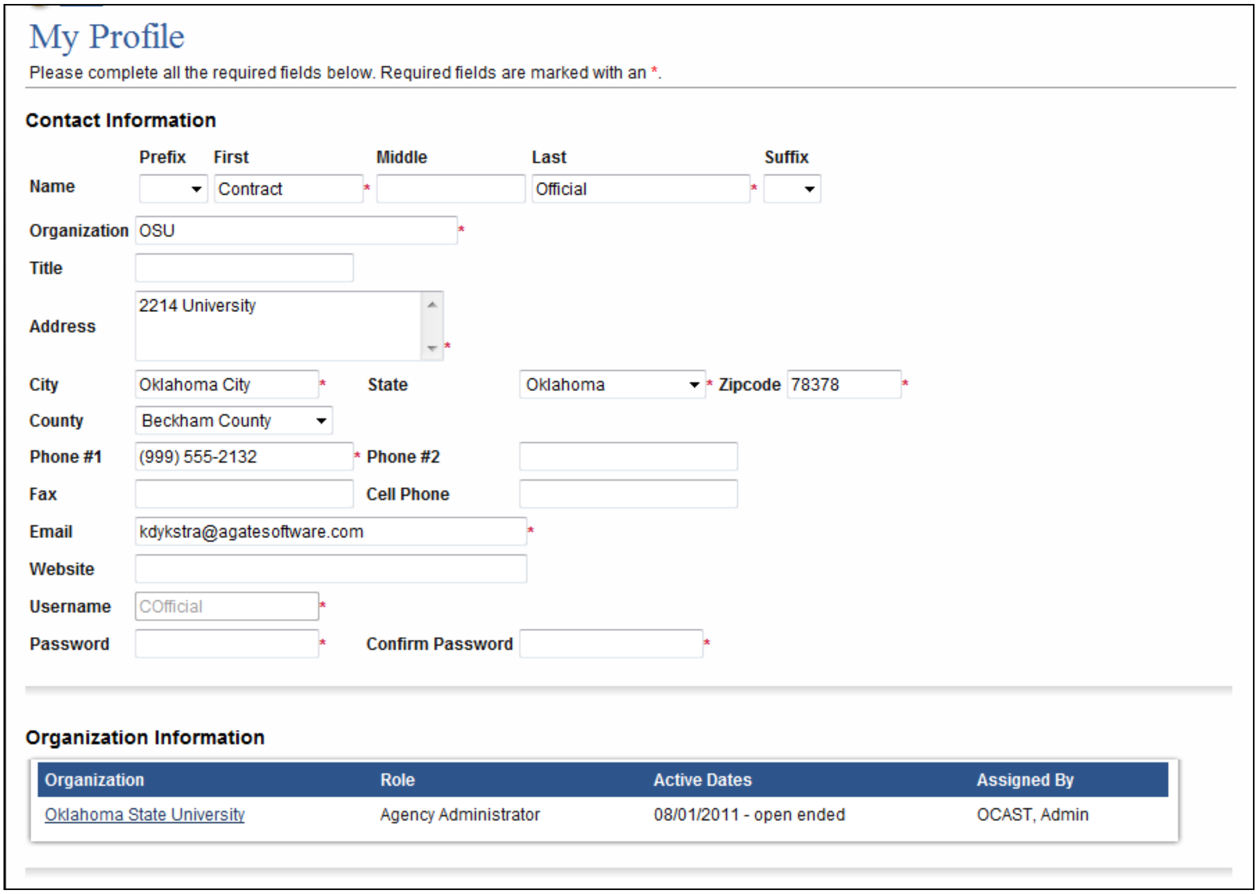


5. Keeping Contact Information Current

In order to receive continued funding or to enter into new grant agreements, it is important that the contact information in OKGrants be as up-to-date as possible. This is done very quickly and easily in OKGrants. By keeping user records and organization records current with all of the latest changes, OCAST staff will be able to contact users appropriately when the need arises. This is especially important for Principal Investigators, as their contact information automatically populates from their profile.

5.a. Updating "My Profile"

A user may update his or her user record at any time by following these steps:



My Profile

Please complete all the required fields below. Required fields are marked with an *.

Contact Information

	Prefix	First	Middle	Last	Suffix
Name		Contract *		Official *	

Organization OSU *

Title

Address 2214 University *

City Oklahoma City * State Oklahoma * Zipcode 78378 *

County Beckham County

Phone #1 (999) 555-2132 * Phone #2

Fax Cell Phone

Email kdykstra@agatesoftware.com *

Website

Username COfficial *

Password * Confirm Password *

Organization Information

Organization	Role	Active Dates	Assigned By
Oklahoma State University	Agency Administrator	08/01/2011 - open ended	OCAST, Admin

1. Click the "My Profile" link on the menu bar on the Main Menu.
2. Update the form accordingly and click the "Save" button.

5.b. Updating "My Organization(s)" (Agency Administrators Only)

When an organization's contact information changes it is important to update that information in the system by following these steps:

1. Click the "My Organization(s)" link on the menu bar.

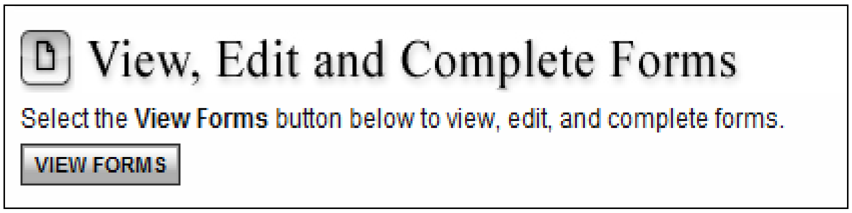
2. Click on the Organization that you would like to edit if more than one appears.
3. Update the form accordingly and click the “Save” button.
4. Select the Organization Details link and be sure the information on the OSF Organization Details page and any state agency pages is also current.

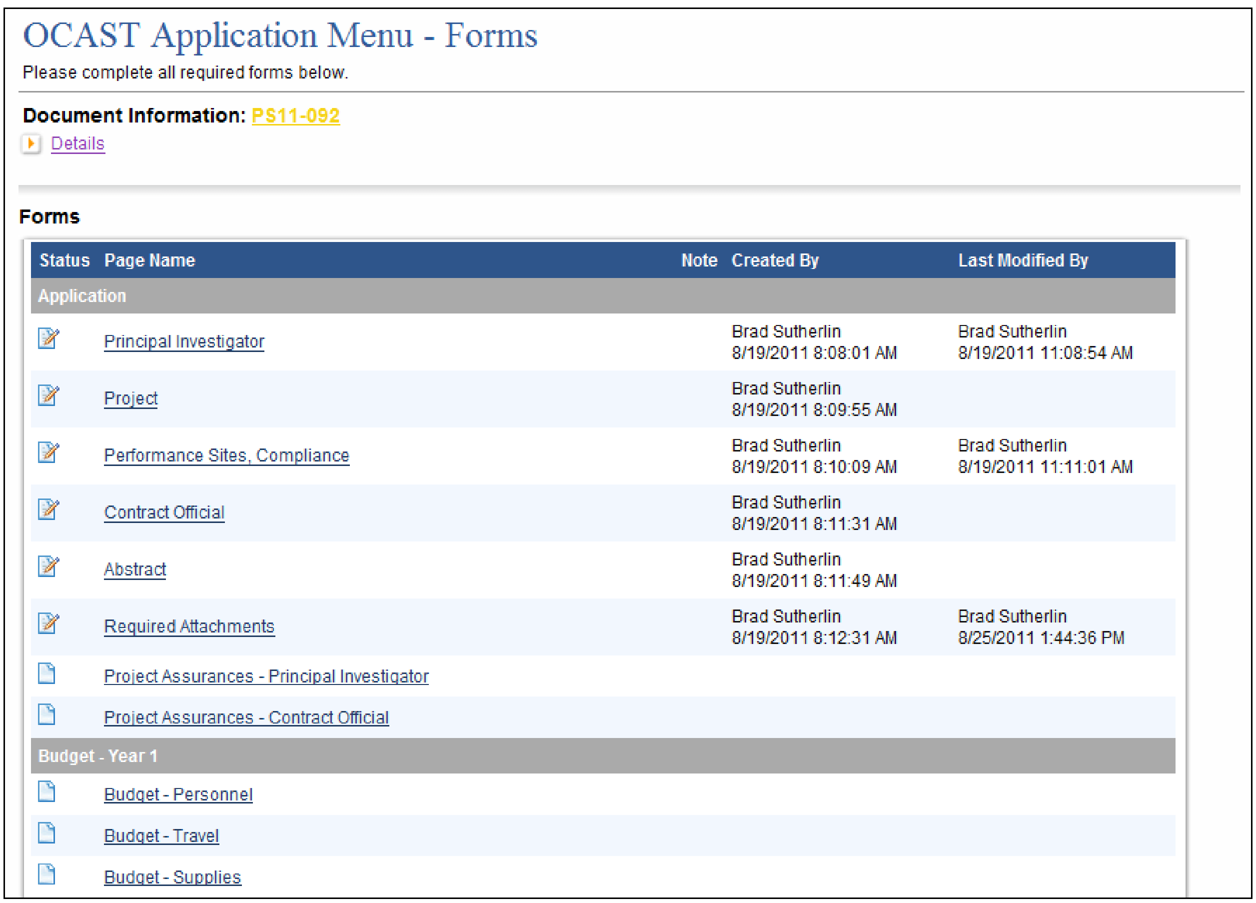
6. The Document Menu

The Document Menu is arranged into various sections that help to organize the document's tasks and information. This menu isn't available until you initiate an intent, then this will be used to navigate through the Intent, Application, and all other documents completed within OKGrants. This manual demonstrates the Document Menu for an application.

6.a. View, Edit and Complete Forms

The "View, Edit and Complete Forms" section is where the vast majority of the work in an application is completed. This section contains all of the forms that are necessary to complete prior to the application being submitted. To edit application forms click the "View Forms" button and then click on the name of the form to complete or edit.

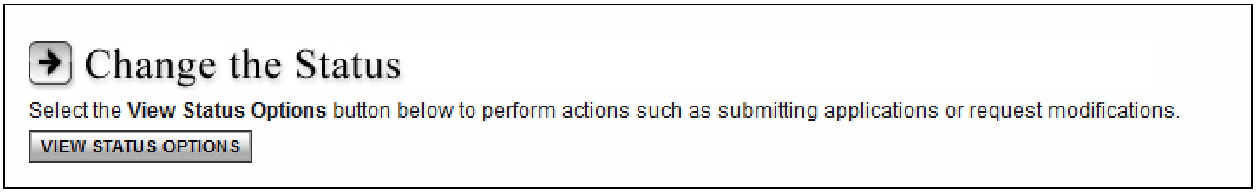


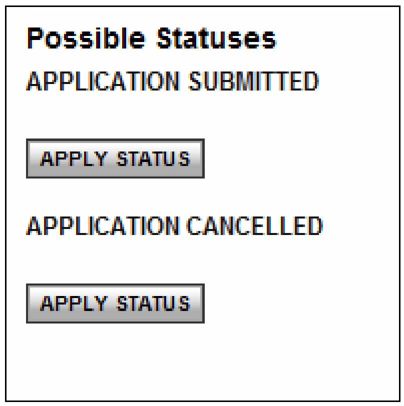


Status	Page Name	Note	Created By	Last Modified By
Application				
	Principal Investigator		Brad Sutherlin 8/19/2011 8:08:01 AM	Brad Sutherlin 8/19/2011 11:08:54 AM
	Project		Brad Sutherlin 8/19/2011 8:09:55 AM	
	Performance Sites, Compliance		Brad Sutherlin 8/19/2011 8:10:09 AM	Brad Sutherlin 8/19/2011 11:11:01 AM
	Contract Official		Brad Sutherlin 8/19/2011 8:11:31 AM	
	Abstract		Brad Sutherlin 8/19/2011 8:11:49 AM	
	Required Attachments		Brad Sutherlin 8/19/2011 8:12:31 AM	Brad Sutherlin 8/25/2011 1:44:36 PM
	Project Assurances - Principal Investigator			
	Project Assurances - Contract Official			
Budget - Year 1				
	Budget - Personnel			
	Budget - Travel			
	Budget - Supplies			

6.b. Change the Status

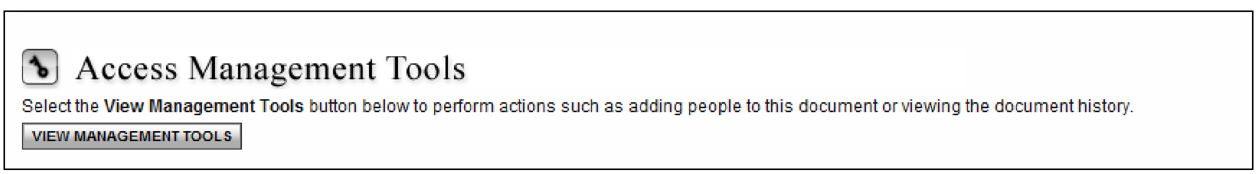
The "Change the Status" section allows an Authorized Official the ability to submit applications (or push the application to the next status level.) Click the "View Status Options" button to see what status push options are currently have available. If this menu is blank, then the current role doesn't have permission to move the application out of its current status.

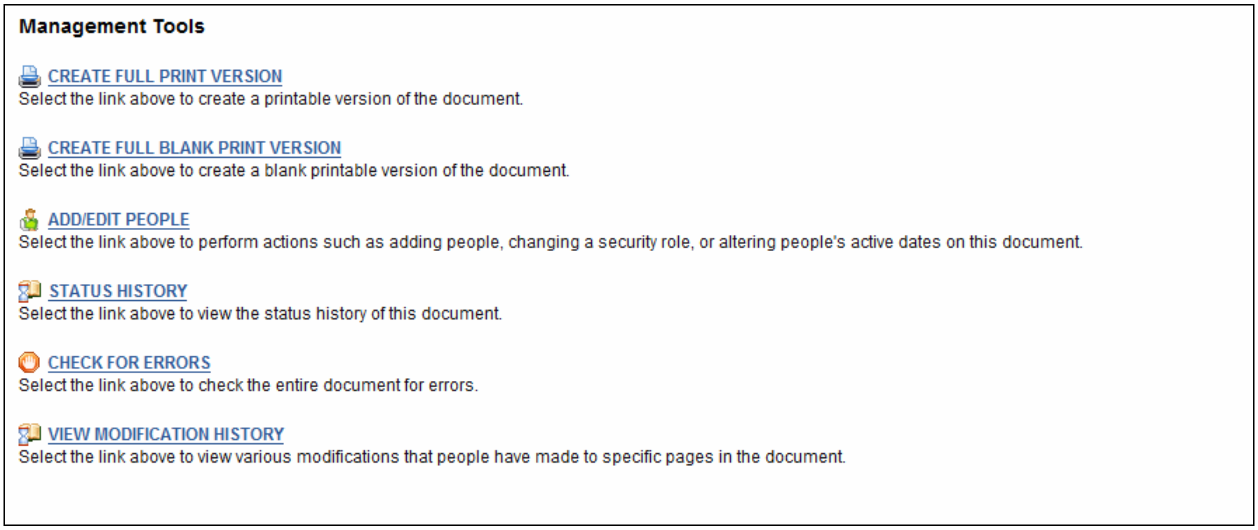




6.c. Access Management Tools

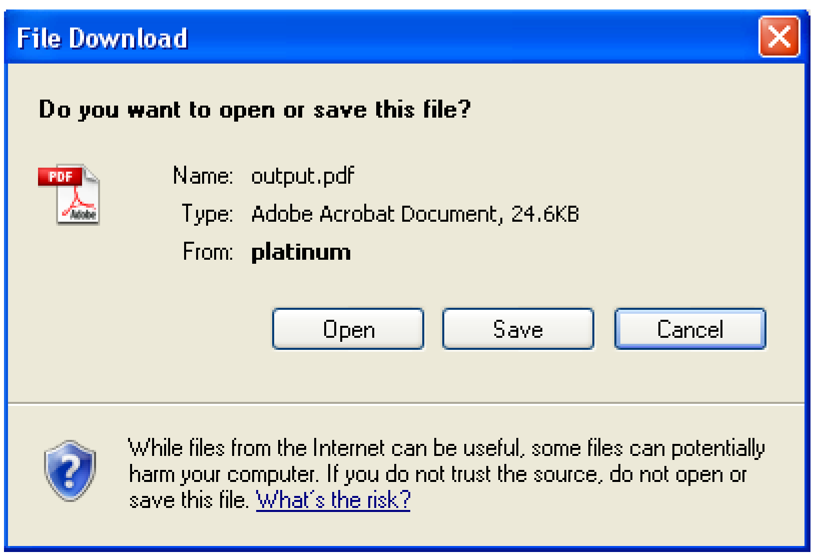
The Management Tools section allows an Agency Administrator, Authorized Official or other authorized staff certain administrative responsibilities such as the ability to add/edit people from the application and view the status history of the application.





CREATE FULL PRINT VERSION will display the entire document, with the fields filled in from the Form pages that are completed.

CREATE FULL BLANK PRINT VERSION will display the entire document, with blanks where data is filled in on Form pages.



See Section 7 below for a detailed description of the ADD/EDIT PEOPLE option.

STATUS HISTORY provides a list of the statuses that a document has passed through.

OCAST Application Menu - Status History

Below are the details for the status history of this document.

Document Information: PS11-041-APP

Details

Document Status History

Status	Date/Time	By	Notes
Application in Process	7/26/2011 12:19:46 PM	Profile, PI	
Application Submitted	7/29/2011 12:01:46 PM	Profile, PI	
Changes Required	7/29/2011 12:23:07 PM	OCAST, Program Officer	

Top of the Page

CHECK FOR ERRORS provides a list of the fields and pages that need to be completed before the document can be moved to the next status.

Global Errors

Document Information: PS11-041-APP

Details

Info	Document Type	Organization	Role	Current Status
	OCAST Application	Oklahoma State University	Authorized Official	Changes Required

You must complete this page.
Abstract

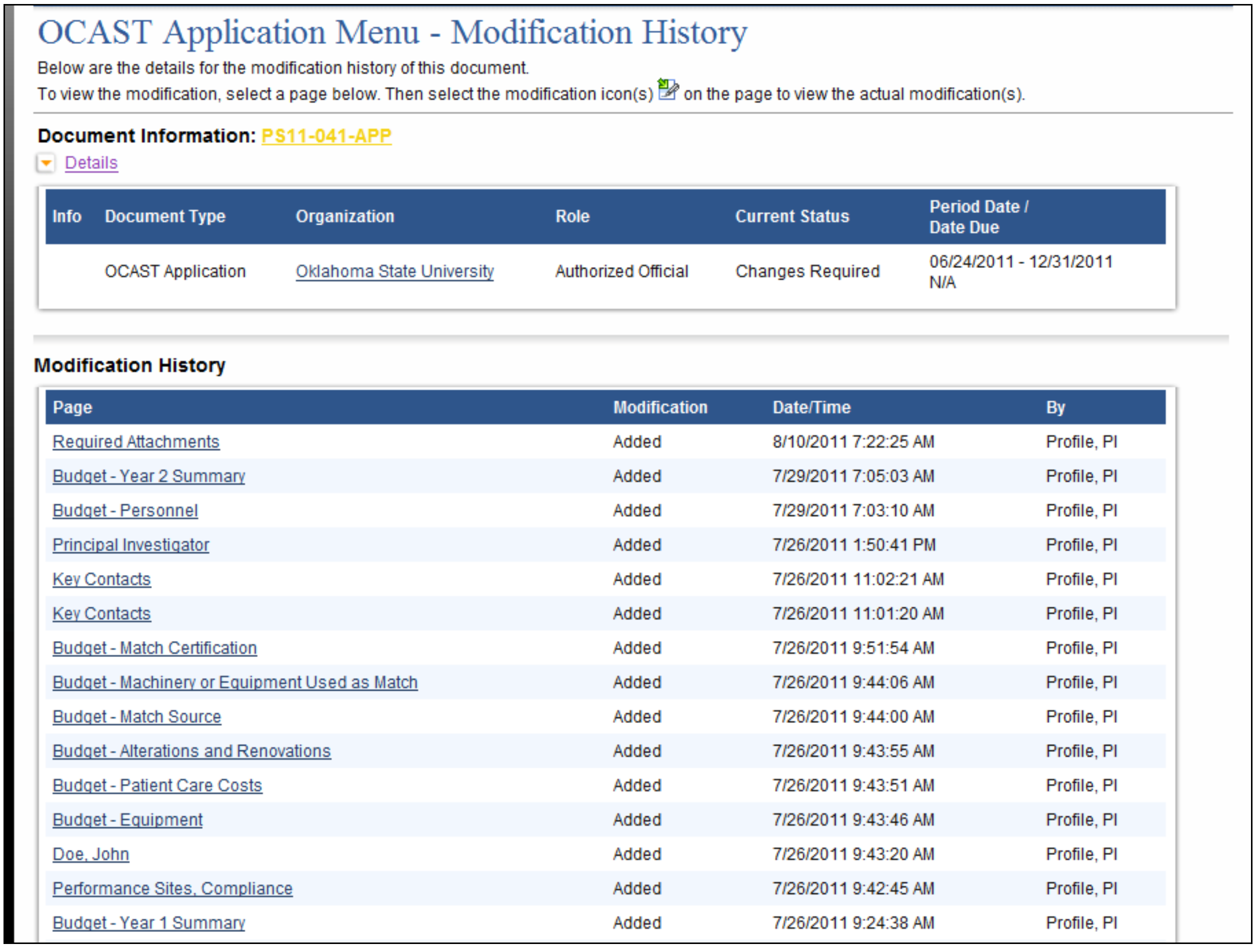
Please enter Fiscal Agent information.;
Contract Official: Doe, John

You must complete this page.
Project

You must complete this page.
Project Assurances - Principal Investigator

Please upload all required documents.;Please select Yes or No in the required fields.;
Required Attachments

VIEW MODIFICATION HISTORY shows a list of all the times a page in your document was modified, when it was modified, and who saved the page.



OCAST Application Menu - Modification History

Below are the details for the modification history of this document.
To view the modification, select a page below. Then select the modification icon(s) on the page to view the actual modification(s).

Document Information: PS11-041-APP

Details

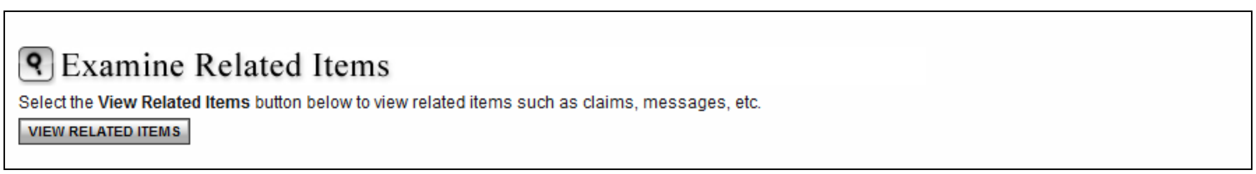
Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	OCAST Application	Oklahoma State University	Authorized Official	Changes Required	06/24/2011 - 12/31/2011 N/A

Modification History

Page	Modification	Date/Time	By
Required Attachments	Added	8/10/2011 7:22:25 AM	Profile, PI
Budget - Year 2 Summary	Added	7/29/2011 7:05:03 AM	Profile, PI
Budget - Personnel	Added	7/29/2011 7:03:10 AM	Profile, PI
Principal Investigator	Added	7/26/2011 1:50:41 PM	Profile, PI
Key Contacts	Added	7/26/2011 11:02:21 AM	Profile, PI
Key Contacts	Added	7/26/2011 11:01:20 AM	Profile, PI
Budget - Match Certification	Added	7/26/2011 9:51:54 AM	Profile, PI
Budget - Machinery or Equipment Used as Match	Added	7/26/2011 9:44:06 AM	Profile, PI
Budget - Match Source	Added	7/26/2011 9:44:00 AM	Profile, PI
Budget - Alterations and Renovations	Added	7/26/2011 9:43:55 AM	Profile, PI
Budget - Patient Care Costs	Added	7/26/2011 9:43:51 AM	Profile, PI
Budget - Equipment	Added	7/26/2011 9:43:46 AM	Profile, PI
Doe, John	Added	7/26/2011 9:43:20 AM	Profile, PI
Performance Sites, Compliance	Added	7/26/2011 9:42:45 AM	Profile, PI
Budget - Year 1 Summary	Added	7/26/2011 9:24:38 AM	Profile, PI

6.d. Examine Related Items

The Examine Related Items section is where you will find items that are related to an application or grant, such as a Progress Report or a Reimbursement Report.



Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

VIEW RELATED ITEMS

7. Assigning Users to an Application

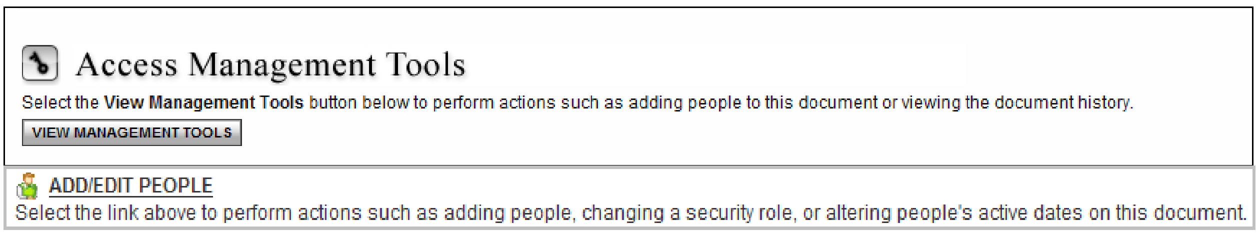
The Agency Administrator has administrative rights to add or remove an Authorized Official, Financial Officer, or Writer to and from applications. Users with the Authorized Official, Financial Officer and Writer roles can be given access to the forms in the application.

Any Agency Administrator who is a member of the organization applying for a grant will automatically be added to that application when the application is first created by the Authorized Official.

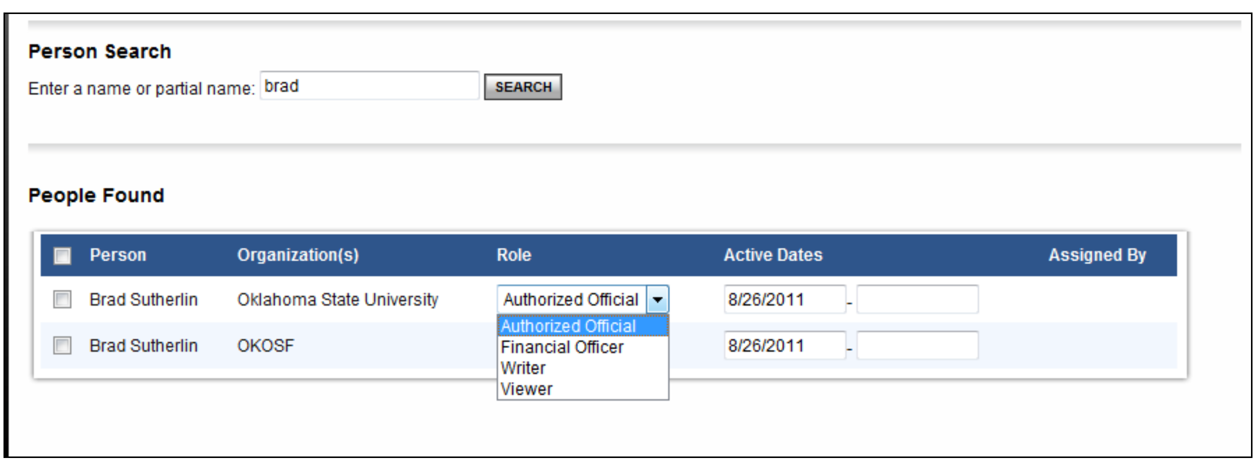
New users to OKGrants will not be automatically added to existing applications. However, any user may be manually added to the application throughout the entire application completion process.

7.a. Assign User Access to an Application

1. To add an Authorized Official, Financial Officer or Writer to an application, the Agency Administrator should navigate to the appropriate application, either through "My Tasks" on the home page or by using the "My Applications" tab at the top of the page.
2. Click the "View Management Tools" button and choose the "Add/Edit People" link.



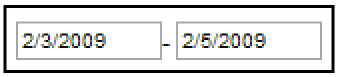
3. Type in the name of the individual in the search criteria box and click the "Search" button.
4. From the search results, select the person, give him/her a security role and fill in the Active Dates for the dates you would like them to be able to access the application. Leave the 2nd box blank for open-ended access.
5. Click the "Save" button to add the selected person to the application.



7.b. Remove User Access to an Application

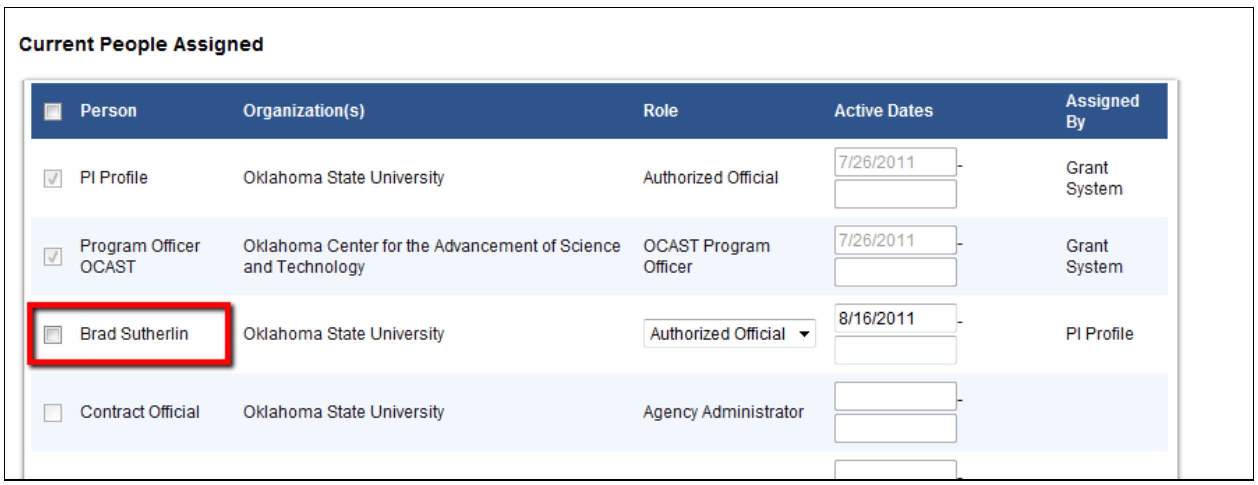
There are two ways to remove a user's access to an application. To begin, on the application menu click the "View Management Tools" button and then choose the "Add/Edit People" link.

1. Edit the active start and/or end date for the user. That user will not be able to access the system before the specified start date or after the specified end date.



Or

2. To remove a user, disable (uncheck) that user and click "Save".



Current People Assigned

Person	Organization(s)	Role	Active Dates	Assigned By
PI Profile	Oklahoma State University	Authorized Official	7/26/2011 -	Grant System
Program Officer OCAST	Oklahoma Center for the Advancement of Science and Technology	OCAST Program Officer	7/26/2011 -	Grant System
Brad Sutherlin	Oklahoma State University	Authorized Official	8/16/2011 -	PI Profile
Contract Official	Oklahoma State University	Agency Administrator	-	

8. Statement of Intent

A Statement of Intent may only be created or submitted by a Principal Investigator for an organization. To create a Statement of Intent follow these steps:

1. Go to “My Home” after logging into the system.
2. Select the “View Opportunities” button, a Statement of Intent is available for each organization a PI belongs to. Select the “Apply Now” button for the Statement of Intent to create.
3. Read the Agreement Language and select “I Agree.”
4. Select the “View Forms” button, and then the “Statement of Intent” link.
5. Click Save and the page will automatically populate with information from “My Profile”, check the information for accuracy. If the contact information is correct, proceed to step 6.
    a. If the contact information is incorrect, select “My Profile” and update the information, then return to the Statement of Intent and select “Save” to update the page.
    b. Select the “My Home” tab and then click the “Open My Tasks” button to find the Intent you just created.
    c. Click the project number link to go back to the Intent Menu and repeat steps 4 and 5.
6. Click the project number link to go back to the Intent Menu.
7. To submit the Statement of Intent and create the Application, select “View Status Options”. Select “Apply Status” under Intent Submitted to submit the intent.

NOTE: If the INTENT CANCELLED status is selected, you may not reopen the intent to submit it. Instead, you must go to “My Home” and repeat steps 2 through 7.

As soon as the Statement of Intent has been submitted, an Application is automatically created. The application can be accessed from either the “My Applications” tab or from the “Open My Tasks” button on the home page.

9. Application

An application is automatically created when a Statement of Intent is submitted. The application can either be accessed by going to the “My Home” tab and clicking “Open My Tasks” or by going to the “My Applications” tab and clicking the “Search” button. Click the Project Number to navigate to the application menu.

1. Go to the project’s Application Menu, either from “My Applications” or “Open My Tasks”.
2. Select the “View Forms” button. Notice there are 2 sections, Application and Budget – Year 1, throughout the application process, more sections will appear as needed.
3. Click the “Principal Investigator” link, this information was copied from the Statement of Intent. If you need to update the information, follow Step 5 in the Statement of Intent section of this manual.
4. The rest of the forms in the application will need to be completed. You can check if the application is ready to submit from any form by selecting the “Check Global Errors” button.
5. Forms for the Applied application, Year 2 Budgets, and others will appear based on how the application is filled out and if they are needed.
6. In order to submit the application, the Agency Administrator for your organization will need to log in and go to the Project Assurances – Contract Official page and click Yes to show that he or she agrees. This radio button can only be selected by an Agency Administrator; it is disabled for all other roles.
7. To submit the Application, select “View Status Options” and select “Apply Status” under Application Submitted to submit the application.