



**District Attorneys Council**

# OKGrants DAC Grantee User Guide

DEC 2015

# Contents

1.	OKGrants System Requirements.....	3
1.a.	Operating System.....	3
1.b.	Internet Connection.....	3
1.c.	Web Browser.....	3
1.d.	Adobe Acrobat Reader.....	3
1.e.	Microsoft Word Viewer .....	3
2.	OKGrants Homepage .....	4
2.a.	Accessing OKGrants .....	4
2.b.	Adding OKGrants to List of Trusted Sites.....	5
3.	Applicant User Types .....	6
4.	User Access in OKGrants (Agency Administrators Only) .....	8
4.a.	Gaining Access as an Agency Administrator .....	8
4.b.	Granting Access to all Other Applicant Agency Users.....	9
4.c.	Deactivating a User.....	11
5.	Keeping Contact Information Current .....	13
5.a.	Updating “My Profile” .....	13
5.b.	Updating “My Organization(s)” (Agency Administrators Only) .....	13
6.	Filling Out Application.....	14
7.	Assigning Users to an Application.....	15
7.a.	Assign User Access to an Application.....	15
7.b.	Remove User Access to an Application.....	17
8.	The Forms Menu.....	18
8.a.	View, Edit and Complete Forms.....	18
8.b.	Change the Status.....	20
8.c.	Access Management Tools.....	20
8.d.	Examine Related Items.....	22
9.	Completing the Award Packet.....	23
10.	Submitting Monthly and Quarterly Financial Forms.....	25
11.	Progress Reports.....	30

## **1. OKGrants System Requirements**

The Oklahoma OKGrants system is designed for use by the vast majority of computer users with little or no changes to the computer environment. The requirements that are mentioned below are common computer elements that should be present on most machines.

These OKGrants system requirements can also be viewed on OKGrants by selecting "System Requirements" from the Login page.

### **1.a. Operating System**

OKGrants is designed for both of the more 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 OKGrants from a Macintosh environment are required to have MacOS 7.5 or higher. Windows users are required to have an operating system that is Windows XP or higher.

### **1.b. Internet Connection**

OKGrants is a web site designed for access via the Internet. For purpose of accessing OKGrants, minimum connection is by modem. For those using a modem, recommended connection speed is at least 33.6 kbps (kilobits per second). Internet connections "faster" than modem, i.e., cable, DSL, T1, wireless improve speed at which the system operates. In an office environment, there may already be an Internet connection, but if unsure, contact your network administrator.

### **1.c. Web Browser**

This system was designed to be compatible with common up-to-date web browsers including Internet Explorer V.7 and above, Firefox, Safari, and Opera.

### **1.d. Adobe Acrobat Reader**

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The OKGrants system automatically generates grant documents in PDF format using information that is saved into various narrative and budget pages. Adobe Acrobat Reader can be used to view, print, or save PDF documents. Adobe Acrobat Reader can be downloaded at [www.adobe.com](http://www.adobe.com).

### **1.e. Microsoft Word Viewer**

OKGrants has a combination of both Microsoft Word and PDF documents. Microsoft Word increases OKGrants' formatting options and reduces the amount of empty space on printed pages. If MS Word is not installed, MS Word Viewer is available for download at [www.microsoft.com](http://www.microsoft.com).

## 2. OKGrants Homepage

### 2.a. Accessing OKGrants

To access OKGrants, enter <https://grants.ok.gov> into the address bar of a web browser. The page looks like the image below.

**Note:** OKGrants does not save the username and password. This option *may* be available on the browser.

STATE OF OKLAHOMA

OKGRANTS

System Login Portal Home

Welcome to the OK Grants system. Within this system, you are able to search for grant opportunities, track your project status and submit requests for payment.

This system requires an initial registration process.

**Login**

Username

Password

[Agency Administrator Registration](#)

[Forgot Password?](#)

- The agency administrator (AA) will complete the initial registration process for the organization by selecting the Agency Administrator Registration button. Only the AA should complete the registration page. **Examples of an agency administrator are Executive Director, Grants Manager, Program Director, Mayor, Research Administrator or CEO.**
- Once access is approved, the AA will receive an e-mail and will designate access to organization members. Access to an organization is only granted by the AA. **Examples of organization members are Principal Investigator, Grant Writer, Associate Director, City Manager or Financial Officer.**
- If an organization member wants access to the organization prior to the agency administrator adding the member, the agency administrator should be contacted directly instead of using the Agency Administrator Registration page. **If any user type besides the AA selects Agency Administrator Registration, the state system administrator will deny the account.** If the member does not know who the agency administrator is, the state system administrator can provide the information.
- If an organization will pursue funding from multiple state agencies, the AA will contact each agency to request access. The Agency Administrator Registration process should not be used to request access to multiple organizations. This will result in multiple accounts.
- Agency contact information, including e-mail, is also included in the Show Help on the Welcome page.

Victims Services Division, District Attorneys Council - VOCA, 405-264-5006  
Stephanie Lowery, District Attorneys Council - All other grants, 405-264-5008  
Kathy Gain, Oklahoma Dept. of Commerce, 405-815-5267  
Kim McCoy, Tobacco Settlement Endowment Trust (TSET), 405-521-6423  
Jay Wall, Oklahoma Highway Safety Office (OHSO), 405-523-1583

## **2.b. Adding OKGrants to List of Trusted Sites**

To avoid various browser-related restrictions unnecessarily placed on OKGrants, make the following changes to the web browser.

If using Internet Explorer, we recommend adding the OKGrants Home page to the list of trusted sites as follows:

1. Select "Tools"
2. Select "Internet Options"
3. Select "Security"
4. Select "Trusted sites"
5. Select "Sites"
6. In "Add this website to the zone:" enter: <https://grants.ok.gov>
7. Select "Add"
8. Select "Close" and then "OK"

### 3. Applicant User Types

There are five security roles defined for OKGrants users: 1) Agency Administrators; 2) Authorized Officials; 3) Financial Officers; 4) Writers; and, 5) Viewers. These roles have different security access to work on the applications. Each security role, or user type, is summarized below. You can have as many people assigned to each role as you want.

Because several state agencies are using this system, the names of the “roles” may or may not correspond what the subgrantees typically use. However, the name of the “role” in OKGrants is listed first and the typical reference to the DAC role is in parenthesis.

#### **APPLICANT USER ROLES IN OKGRANTS**

##### **1. Authorized Official (Chief Executive Office of the Applicant Agency)**

- Can view My Organization fields.
- Has access to view and edit all applications for the organization.
- Can Initiate, Submit, and Cancel applications.
- Has access to view and edit project documents.
- Can update Organization contact information.

##### **2. Agency Administrator (Project Director)**

- Has Access to My Organization fields and the ability to add additional members.
- Has access to view and edit all applications for the organization.
- Can Initiate, Submit, and Cancel applications.
- Has access to view and edit project documents.
- Can update Organization contact information.

##### **3. Financial Officer (Fiscal Officer)**

- Has access to view the application.
- Has access to view and edit all applications for the organization.
- Has access to view, edit, and submit the Financial Reports

##### **4. Writer**

- Can Initiate and Submit applications.
- Has access to view and edit the application.

- Can only see applications they are assigned to.

## 5. Viewer

- Has access to view the application.
- Can only see applications they are assigned to.

The following grid may also be helpful in understanding the OKGrants User Roles.

Security Roles	Controls Access to Organization	Controls Access to Application	Read	Write	Initiate Application	Submit Application	Cancel Application
Agency Administrator /Project Director	X	X	X	X	X	X	X
Authorized Official /Chief Executive Officer		X	X	X	X	X	X
Financial Officer			X	X			
Writer			X	X	X		
Viewer			X	X			

## 4. User Access in OKGrants (Agency Administrators Only)

In order to use the system, a user account must be created. There are two ways to get access to OKGrants. Both processes for gaining access are described below.

**Agency Administrator:** The first person from an agency to register may access OKGrants using the “Agency Administrator Registration” link on the OKGrants Login page. Fill out the profile (user information) and wait for an OKGrants DAC System Administrator to activate the account.

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

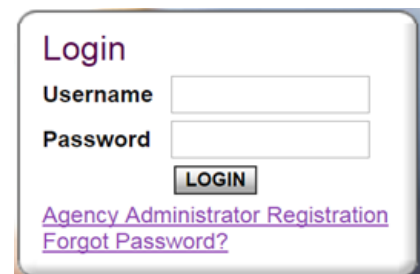
As Agency Administrator for the organization, a user must first obtain access by following the procedure under section 4.a. Once an Agency Administrator has obtained access to OKGrants, they can add additional organization members as described in section 4.b.

### 4.a. Gaining Access as an Agency Administrator

If an organization doesn’t already exist in OKGrants, a new user account and organization must be requested. If the organization is already in OKGrants, then request access through an Agency Administrator of that organization. If you are unsure if your organization exists or who the agency administrator is, please contact a DAC System Administrator. Contact information is located on the login page.

To create a new user account:

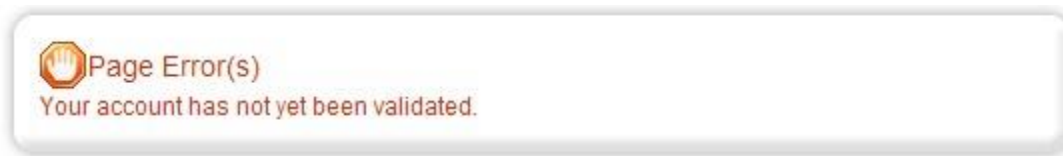
1. From the OKGrants homepage click the “Agency Administrator Registration” link located in the “Login” section.
2. Complete the user form in its entirety.
  - a. Fill in all information as required. All items marked with an ‘\*’ are required to create an account.
  - b. The “Username” field must consist 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 a user account has been validated, there is no need to request access again. The same username can be used for all organizations and applications. There is no need to create a separate user account for each application or state agency within OKGrants.



After creating a user account an OKGrants System Administrator must approve it before the system can be accessed. If a user attempts to access the system prior to being validated the following message is received:



When the DAC system administrator grants access, an e-mail message confirming that the account has been validated will be received.

## 4.b. Granting Access to all Other Applicant Agency Users

To add a new user to an organization, follow the steps indicated.

1. Click "My Organization", and then click "Organization Members".

**Organization - Grantee Test Org**  
Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

**Organization Members**  
Administrators with the authority to add members to your organization can follow these steps:  
To add a member to your organization, select the **Add Members** link below.  
If a member has already added his/her information in the system, you can search for the member.  
If you need to add a member's information into the system, select **New Member**.  
For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

<input type="checkbox"/>	Person	Role	Active Dates	Assigned By	Modified By
<input checked="" type="checkbox"/>	<a href="#">Admin, Grantee</a>	Agency Administrator	6/7/2011 -	Tkaczyk, Joshua 6/7/2011	Tkaczyk, Joshua 6/7/2011
<input checked="" type="checkbox"/>	<a href="#">OrgAdd, Testing</a>	Agency Administrator	9/21/2011 -	OCAST, SysAd 9/20/2011	Admin, Grantee 10/7/2011
<input checked="" type="checkbox"/>	<a href="#">Domains, Testing</a>	Authorized Official	9/21/2011 -	OCAST, SysAd 9/20/2011	Admin, Grantee 10/7/2011
<input checked="" type="checkbox"/>	<a href="#">Domains, Testing</a>	Authorized Official	9/20/2011 -	OCAST, SysAd 9/20/2011	
<input checked="" type="checkbox"/>	<a href="#">Grantee, Test</a>	Authorized Official	6/7/2011 -	Tkaczyk, Joshua 6/7/2011	
<input checked="" type="checkbox"/>	<a href="#">new message, testing</a>	Authorized Official	9/20/2011 -	Tkaczyk, Joshua 9/20/2011	
<input checked="" type="checkbox"/>	<a href="#">Notifications, Test</a>	Authorized Official	9/16/2011 -	Tkaczyk, Joshua 9/16/2011	

2. Click "Add Members", and a person search field appears. Type the first or last name of the person to add and select "Search." The results appear below.

Person Search

Person	Role	Active Dates	Assigned By	Modified By
<input type="checkbox"/> <a href="#">21.DAC</a>	OK System Administrator (Main Domain) ▼	11/1/2011 - <input type="text"/>		
<input type="checkbox"/> <a href="#">agencyadministrator.dac</a>	OK System Administrator (Main Domain) ▼	11/1/2011 - <input type="text"/>		
<input type="checkbox"/> <a href="#">DAC.Admin</a>	OK System Administrator (Main Domain) ▼	11/1/2011 - <input type="text"/>		
<input type="checkbox"/> <a href="#">DAC.Grant Program Spec</a>	OK System Administrator (Main Domain) ▼	11/1/2011 - <input type="text"/>		
<input type="checkbox"/> <a href="#">DAC.Grantee</a>	OK System Administrator (Main Domain) ▼	11/1/2011 - <input type="text"/>		
<input type="checkbox"/> <a href="#">Reviewer.DAC</a>	OK System Administrator (Main Domain) ▼	11/1/2011 - <input type="text"/>		

- If the person's name appears, place a check in the box next to the person to add. Select a role, enter an active date (beginning), and "Save." Then select "Current Members" and the person added should show with the rest of the organization's member names. Click "Save".

Person Search

Person	Role	Active Dates	Assigned By	Modified By
<input type="checkbox"/> <a href="#">21.DAC</a>	Agency Administrator ▼	11/1/2011 - <input type="text"/>		
<input type="checkbox"/> <a href="#">agencyadministrator.dac</a>	Authorized Official ▼	11/1/2011 - <input type="text"/>		
<input checked="" type="checkbox"/> <a href="#">DAC.Admin</a>	Agency Administrator ▼	11/1/2011 - <input type="text"/>		
<input type="checkbox"/> <a href="#">DAC.Grant Program Spec</a>	Financial Officer ▼	11/1/2011 - <input type="text"/>		
<input type="checkbox"/> <a href="#">DAC.Grantee</a>	Agency Administrator ▼	11/1/2011 - <input type="text"/>		
<input type="checkbox"/> <a href="#">Reviewer.DAC</a>	Agency Administrator ▼	11/1/2011 - <input type="text"/>		

- If the person's name does not come up in the search results, then select "New Member."

### Organization Members

Administrators with the authority to add members to your organization can follow these steps:  
 To add a member to your organization, select the **Add Members** link below.  
 If a member has already added his/her information in the system, you can search for the member.  
 If you need to add a member's information into the system, select **New Member**.  
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Person Search

5. Enter information for the new user and "Save & Add To Organization."

The screenshot shows a web interface for managing organization members. At the top right, there are three buttons: 'SAVE', 'SAVE & ADD TO ORGANIZATION' (highlighted with a red box), and 'SHOW HELP'. Below these is a 'Back' link. The main heading is 'Organization - Grantee Test Org'. A sub-heading says 'Follow the instructions listed below to add/remove/modify organization members.' Below this are four navigation links: 'Organization Information', 'Organization Members', 'Organization Documents', and 'Organization Details'. The main section is titled 'Add/Edit Members'. It contains instructions: 'Administrators with the authority to add members to your organization can follow these steps: Please complete the information below. All required fields are marked with an \*.' The form fields are: 'Name' (Prefix: dropdown, First: 'DAC', Middle: empty, Last: 'Grantee', Suffix: dropdown), 'Title' (empty), 'Email' ('dac@dac.ok.gov'), 'Username' ('dacuser'), 'Password' (masked with dots), 'Confirm Password' (masked with dots), 'Date Active' ('10/7/2011'), 'Date Inactive' (empty), and 'Role' (dropdown with 'Authorized Official' selected).

**Note:** "Save and Add to Organization" MUST be selected to add the new user to the organization.

#### 4.c. Deactivating a User

An Applicant Agency Administrator can deactivate a member of an organization. A deactivated user cannot access, view, or edit OKGrants information. To deactivate a user:

1. Select "Administration"
2. Select "Organization Administration"
3. Search for the organization to access and select that organization's name
4. Select "Organization Members"
5. Using the drop-down calendar, set the second "Active Dates" field to the date on which the user will no longer have access
6. Select "Save"

## Organization - Kyle's Test Org

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

### Organization Members

Administrators with the authority to add members to your organization can follow these steps:

To add a member to your organization, select the **Add Members** link below.

If a member has already added his/her information in the system, you can search for the member.

If you need to add a member's information into the system, select **New Member**.

For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

<input type="checkbox"/> Person	Role	Active Dates		Assigned By	Modified By
<input checked="" type="checkbox"/> <a href="#">Name, This</a>	Agency Administrator	9/8/2011	10/5/2011	Tkaczyk, Joshua 9/8/2011	
<input checked="" type="checkbox"/> <a href="#">Notifications again, Testing</a>	Agency Administrator	9/13/2011	-	OCAST, SysAd 9/13/2011	
<input checked="" type="checkbox"/> <a href="#">Notifications, Even</a>	Agency Administrator	9/12/2011	-	OSF Admin , System 9/12/2011	
<input checked="" type="checkbox"/> <a href="#">Notifications, Testing</a>	Agency Administrator	9/20/2011	-	Dykstra, Kyle 9/20/2011	

## 5. Keeping Contact Information Current

In order to receive correspondence or information after a grant is awarded, to receive future notices, or to apply for new grant programs, it is critical that up-to-date contact information is maintained in OKGrants. This is done very quickly and easily in OKGrants.

### 5.a. Updating “My Profile”

To update the user profile:

1. From the Home page, select “My Profile”
2. Update the form with current information
3. Select “Save”

[Back](#)

### My Profile

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

**Contact Information**

Name	Prefix	First	Middle	Last	Suffix
	▼	Grantee *		Admin *	▼
Organization					
Title					
Address	2214 University Dr *				
City	Okemos *	State	Oklahoma ▼ *	Zipcode	48840 *
County	▼ *				
Phone #1	(517) 708-4893 *	Phone #2			
Fax		Cell Phone			
Email	test@agatesoftware.com *				
Website					
Username	osfgrantee *				
Password		Confirm Password			

### 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 **to** edit if more than one appears.
3. Update the form accordingly and click the “Save” button.

## **6. Filling Out the Application**

To start an application, follow the directions below.

1. Go to “My Home” after logging into the system.
2. Select the “View Opportunities” button. An Application is available for each organization the user belongs to. Select the “Apply Now” button under the Application to create.
3. Read the Agreement Language and select “I Agree.”
4. Complete the application as outlined in section 8.
5. To submit the Application, select “View Status Options” and select “Apply Status” under Application Submitted.
6. An Application can be cancelled at any time before it is submitted by going to “View Status Options” and selecting “Apply Status” under Application cancelled.
7. Do not accidentally open a new application while an application is in progress to prevent data from being entered in two places.

Once the application has been started, it 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 application name to navigate to the application menu

## 7. Assigning Users to an Application

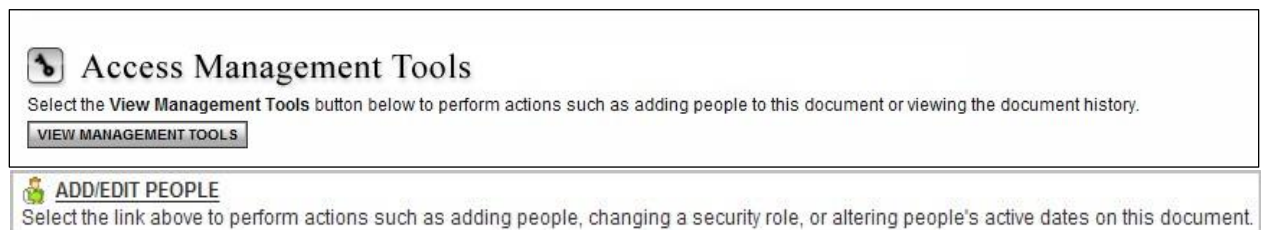
The Agency Administrator has administrative rights to add or remove an Authorized Official, Financial Officer, Writer, or Viewer to and from applications. Users with the Authorized Official, Financial Officer, Writer, and Viewer roles can be given access to the forms in the application.

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, Writer, or Viewer 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 they should be able to access the application. Leave the 2<sup>nd</sup> box blank for open-ended access.
5. Click the “Save” button to add the selected person to the application.

Document Information: **2012-JAG-GRANTEE\_TEST-007**

[Details](#)

### Person Search

Enter a name or partial name:

**SEARCH**

### People Found

<input type="checkbox"/> Person	Organization(s)	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/> DAC Admin	OKOSF_DAC	Agency Administrator ▼	10/7/2011	
<input type="checkbox"/> dac ia	OKOSF_DAC	Agency Administrator	10/7/2011	
<input type="checkbox"/> testing for DAC		Authorized Official	10/7/2011	
<input type="checkbox"/> test DACnotifications		Financial Officer	10/7/2011	
<input type="checkbox"/> testing DACDomain		Writer	10/7/2011	
<input type="checkbox"/> testing DACDomain		Viewer	10/7/2011	
<input type="checkbox"/> testing DACDomain		Agency Administrator ▼	10/7/2011	
<input type="checkbox"/> testing DACDomain		Agency Administrator ▼	10/7/2011	
<input type="checkbox"/> testing DACDomain		Agency Administrator ▼	10/7/2011	



## 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.

2/3/2009	-	2/5/2009
----------	---	----------

Or

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

Current People Assigned				
<input type="checkbox"/> Person	Organization(s)	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/> PI Profile	Oklahoma State University	Authorized Official	7/26/2011 <input type="text"/>	Grant System
<input checked="" type="checkbox"/> Program Officer OCAST	Oklahoma Center for the Advancement of Science and Technology	OCAST Program Officer	7/26/2011 <input type="text"/>	Grant System
<input type="checkbox"/> Brad Sutherlin	Oklahoma State University	Authorized Official ▼	8/16/2011 <input type="text"/>	PI Profile
<input type="checkbox"/> Contract Official	Oklahoma State University	Agency Administrator	<input type="text"/> <input type="text"/>	

## 8. The Forms Menu

The Forms Menu is arranged into various sections that help to organize the document's tasks and information. This menu isn't available until after an application is initiated, then this will be used to navigate through the application and all other documents completed within OKGrants. This section demonstrates the Forms Menu for an application.

### 8.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.
















### DAC Application Menu - Forms

Please complete all required forms below.

**Document Information: 2016-VOCA-DACTest-019**

 [Details](#)

#### Forms

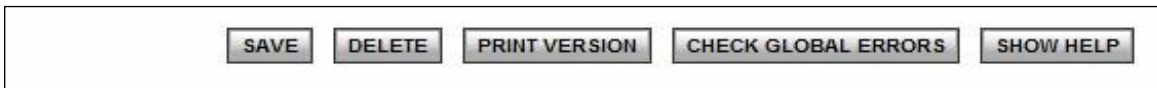
Status	Page Name	Note	Created By	Last Modified By
Application				
	<a href="#">Pre-Application Instructions</a>			
	<a href="#">Applicant Information</a>			
	<a href="#">New Program Narrative</a>			
	<a href="#">Goals, Objectives, and Activities</a>			
	<a href="#">New Program Work Plan</a>			
	<a href="#">VOCA Guideline Requirements</a>			
	<a href="#">Project Classification and Evaluation</a>			
	<a href="#">Funding Sources</a>			
	<a href="#">Fiscal Impact</a>			
Budget				
	<a href="#">Personnel &amp; Benefits</a>			
	<a href="#">Contractors and Consultants</a>			
	<a href="#">Travel</a>			
	<a href="#">Equipment</a>			

Follow the instructions on each form page to complete it.

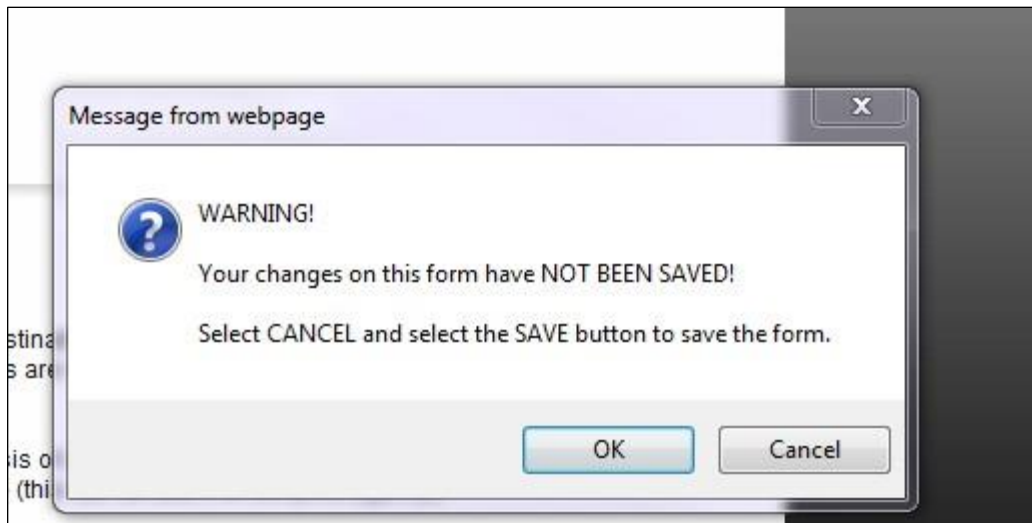
Click “Save” periodically to save any information entered. Some pages are only required by certain types of projects. To check if a page is required, save the page as soon as it is opened. If no errors are received, that page is not required.

Many pages have a “Show Help” button, select it for more information about the page.

Select the “View Global Errors” button on any form to see any errors or incomplete pages in the application.




OKGrants also has a “Page Save Warning” feature, if any field in a form is changed, a pop-up box will appear if you attempt to leave the page without saving. Click “OK” to leave the page without saving, click “Cancel” to return to the form and save changes.



## 8.b. Change the Status

The “Change the Status” section allows an Agency Administrator or 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 available. If this menu is blank, then the current role doesn’t have permission to move the application out of its current status.

 **Change the Status**  
Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

**Possible Statuses**  
APPLICATION SUBMITTED  
  
APPLICATION CANCELLED

## 8.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 print a PDF of the application.

## DAC Application Menu - Management Tools

The menu below contains links to the tools that can be used to manage this document. See the description below each link for more detail.

**Document Information:** [2012-JAG-GRANTEE\\_TEST-007](#)

 [Details](#)

### Management Tools

 [CREATE FULL PRINT VERSION](#)

Select the link above to create a printable version of the document.

 [CREATE FULL BLANK PRINT VERSION](#)

Select the link above to create a blank printable version of the document.

 [ADD/EDIT PEOPLE](#)

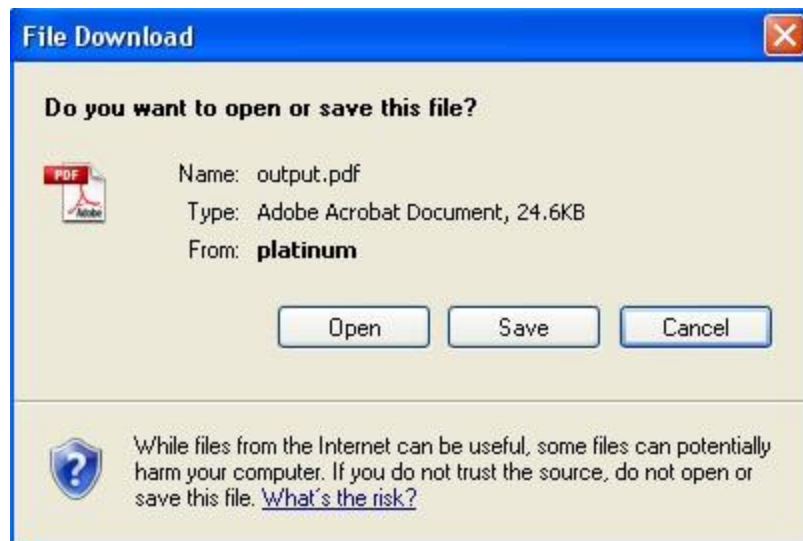
Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

 [CHECK FOR ERRORS](#)

Select the link above to check the entire document for errors.

[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.




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

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:** **2012-JAG-GRANTEE\_TEST-007**

 [Details](#)

---

 Information populated on this page is derived from other pages that were changed.  
Please review this page for accuracy.  
[Overall Budget Summary](#)


 Performance Measures is required.;  
[Performance Measures](#)

 You must complete this page.  
[Required Attachments](#)

 You must complete this page.  
[Standard Assurances](#)

## 8.d. Examine Related Items

The Examine Related Items section is where items that are related to an application or grant, such as a Progress Report or a Reimbursement Report, can be easily found. Begin here to initiate a monthly or quarterly VOCA financial report. See section 10 for detailed instructions.

 **Examine Related Items**

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

[VIEW RELATED ITEMS](#)

## 9. Completing the Award Packet

If the application is in Requires Signature status, the award documents are available for completion.

**Review the Award Packet Instructions prior to completing any award forms.**

Certain forms, including the budget forms, in the application will become available for modification. The amount requested must match the amount awarded. The amount from the submitted application will be deleted and a new amount will be entered. To clear radio buttons, double click.


Once all forms are completed, navigate to the DAC Application Menu using the Document Identifier and select View Status Options under Change the Status. Signatures Submitted will be the only status. If you need to cancel or withdraw the application, contact a DAC System Administrator.

If you Apply Status and the award forms have errors, a list of errors will appear and will have to be corrected prior to submission.


### Global Errors

**Document Information:** 2012-JAG-District 23-102

 [Details](#)

 Complete entire row of Personnel information.;

[Detailed Budget and Narrative Personnel and Benefits](#)

 Information populated on this page is derived from other pages that were changed. Please review this page for accuracy.

[Overall Budget Summary](#)

**NOTE:** Regardless of the DAC program, only the Authorized Official can submit the award packets.

### DAC Application Menu - Status Options

Select a button below to execute the appropriate status push.

**Document Information:** 2012-JAG-District 23-102

 [Details](#)

#### Possible Statuses

SIGNATURES SUBMITTED

A print version will capture the original information as well as the updated information. To view the print version, select Access Management Tools, Create Full Print Version. Each version of the application is captured.

PRINT VERSION

 [Back](#)

## Printable Document

Click the **Print Version** button to view the printable version of your document.

---

Please select the document version that you would like to print:

☒ 6/28/2012 12:13:00 PM

☐ 4/23/2012 4:04:30 PM

☐ 3/15/2012 12:31:56 PM

A DAC staff member will review the application and if modifications are required will change the status to Modifications Required.




## 10. Submitting monthly and quarterly financial forms

Once your application is in the Grant Awarded status, monthly and quarterly financial reports can be submitted.

1. To initiate a financial form, search for the awarded application under My Applications, select the application and then Examine Related Items on the DAC Application Menu. Once a financial form has been initiated, it can be found by searching My Financials or navigating to DAC Application Menu > Examine Related items

### DAC Application Menu

**Document Information: 2012-VOCA-District 23-082**

 [Details](#)

#### View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

**VIEW FORMS**

#### Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

**VIEW STATUS OPTIONS**

#### Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

**VIEW MANAGEMENT TOOLS**

#### Examine Related Items

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

**VIEW RELATED ITEMS**

## DAC Application Menu - Related Items

The various sections below can link to items that are associated with this document.

**Document Information:** 2012-JAG-District 23-100

 [Details](#)

### Related Documents

Sort search results by:  

Document Type	Name	Current Status	Period Date / Date Due	Created By	Last Modified By
DAC Financial Report	<a href="#">Initiate a/an DAC JAG A-3 June Financial Reports</a>				
DAC Financial Report	<a href="#">Initiate a/an DAC JAG A-7 Quarterly Financial Reports</a>				

2. Select the appropriate form. After Agreeing, the program will display the DAC Financial Report Menu. PLEASE NOTE: The DAC Financial Report Menu layout is similar to the DAC Application Menu. Make sure you are on the correct Menu.

## DAC Financial Report Menu

**Document Information:** A3-2012-District 23-00049

**Parent Information:** 2012-JAG-District 23-100

 [Details](#)

### View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

### Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

### Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

### Examine Related Items

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

3. Select View, Edit, Complete Forms. Then Monthly request for funds.

## DAC Financial Report Menu

**Document Information:** MFR-Jun-2012-DA 22-01298

**Parent Information:** 2012-VOCA-DA 22-191

 [Details](#)

### View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

**VIEW FORMS**

## DAC Financial Report Menu - Forms


Please complete all required forms below.

**Document Information:** MFR-Jun-2012-DA 22-01298

**Parent Information:** 2012-VOCA-DA 22-191

 [Details](#)

### Forms

Status	Page Name	Note	Created By	Last Modified By
Monthly Financial Report				
	<a href="#">Monthly Request for Funds</a>		Grant System	
			7/17/2013 4:00:31 AM	
	<a href="#">Peoplesoft Transaction Form DAC_VOCA</a>			

Below is a sample VOCA form. The forms are dependent on the DAC Grant program.

TO COMPLETE: Select a *Contact Person* from the dropdown box, Choose the *Quarter* for this report, and enter data in the *Grant Funds Expended Last Month* and *Match Expenditures for Previous Month* columns. SAVE to update the ending balances and *Amount of this Request*.

**Document Information:** MFR-Jun-2012-DA 22-01298

**Parent Information:** 2012-VOCA-DA 22-191

 [Details](#)

You are here: > [DAC Financial Report Menu](#) > [Forms Menu](#) > Monthly Financial Report

## MONTHLY REQUEST FOR FUNDS

### Instructions:

Please complete this page and click **SAVE**.

Fields will populate with information and any errors will be noted at this point.

Required fields are marked with a \*.

Click [here](#) to go to the "Change the Status" page.

**Contact Person:**

**Address:**

**Fax:**

**Phone:**

**Award Amount:** \$28,662

**Subgrant Number:** 2012-VOCA-DA 22-191

**Date Submitted:**

*Date Submitted will automatically fill in once the Request is submitted to VOCA*

**Quarter**

Quarter	Month
Quarter 1 - Sept 30th	July August September
Quarter 2 - Dec 31st	October November December
Quarter 3 - March 31st	January February March
Quarter 4 - June 30th	April May June

<b>Amount of This Request:</b>	
Amount Previously Drawn Down	
Amount Available To Draw Down	

Once this request is submitted, no changes can be made. Changes will be made in the month they are discovered.

	Approved Expenditure Budget	Total Expenses Previously Reported	Grant Funds Expended Last Month	Balance of Grant Funds	Approved Match Budget	Total Match Previously Reported	Match Expenditures for Previous Month	Balance of Match Funds
<b>Personnel &amp; Benefits</b>	\$28,662	\$28,662.00			\$7,166	\$6,568.87		
<b>Consultant/Contractor</b>	\$0				\$0			
<b>Travel</b>	\$0				\$0			
<b>Equipment</b>	\$0				\$0			
<b>Facilities/Rental</b>					\$0			
<b>Supplies/Operating</b>	\$0				\$0			
<b>Other</b>					\$0			
<b>Volunteer Hours</b>						\$0		
<b>TOTAL</b>								
<b>Volunteer hours</b>	Volunteer Match Hours Itemized					Hours @		
						Hours @		
						Hours @		
						Hours @		

**Total:**

EFT Payment Memo

4. Once completed, navigate to DAC Financial Report Menu, View Status Options and change the status. Or Select the “Click [here](#) to go to the Change the Status page” shortcut on the VOCA form, above the Contact Person’s name.

## DAC Financial Report Menu - Status Options

Select a button below to execute the appropriate status push.

**Document Information:** A3-2012-District 23-00049

**Parent Information:** 2012-JAG-District 23-100

 [Details](#)

### Possible Statuses

**FINANCIAL REPORT SUBMITTED**

**FINANCIAL REPORT CANCELLED**

## 11. Progress Reports

Progress Reports are initiated under Examine Related Items.

To initiate a progress report, search for the awarded application under My Applications, select the application and then Examine Related Items on the DAC Application Menu. Once initiated, an existing Progress Report can be found by searching under My Programmatic Reports.

### DAC Application Menu

**Document Information: 2012-VOCA-District 23-082**

 [Details](#)

#### View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

**VIEW FORMS**

#### Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

**VIEW STATUS OPTIONS**

#### Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

**VIEW MANAGEMENT TOOLS**

#### Examine Related Items

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

**VIEW RELATED ITEMS**

## DAC Application Menu - Related Items

The various sections below can link to items that are associated with this document.

**Document Information: 2012-VOCA-CASA-072**

[Details](#)

### Related Documents

Sort search results by:

Document Type	Name	Current Status	Period Date / Date Due	Created By	Last Modified By
DAC Financial Report	<a href="#">Initiate a/an DAC VOCA Quarterly Financial Report</a>				
DAC Progress Report	<a href="#">Initiate a/an VOCA Progress Report</a>				

After Agreeing, the DAC Progress Report Menu will appear. Select View Forms.

## DAC Progress Report Menu

**Document Information: JAGPR-2012-District 23-00073**

**Parent Information: 2012-JAG-District 23-100**

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	DAC Progress Report	<a href="#">District 23 District Attorney's Office</a>	Authorized Official	Progress Report In Process	02/01/2012 - 02/01/2013 02/01/2013 12:00PM EST

### View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

### Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

### Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

### Examine Related Items

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

Complete the forms in the DAC Progress Report Menu – Forms. Once all required forms are completed and errors have been corrected, Change the Status to submit.