OKGRANTS

State of Oklahoma

District Attorneys Council

OKGrants
DAC Grantee User Guide

DEC 2015

Contents

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.

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.

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.

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.

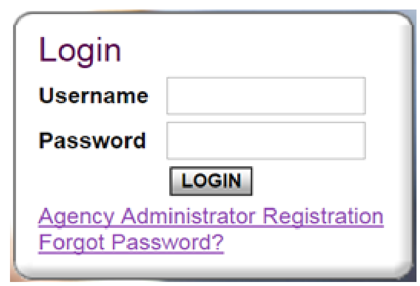
All other roles: Request access from/be added by the organization's Agency Administrator.

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.

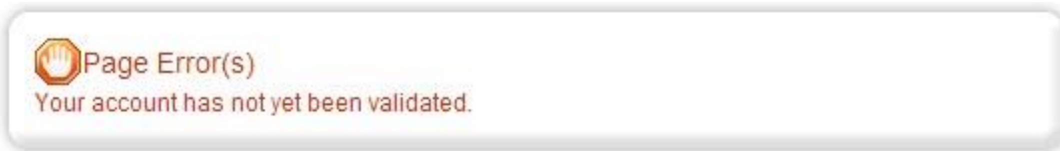
To create a new user account:



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:

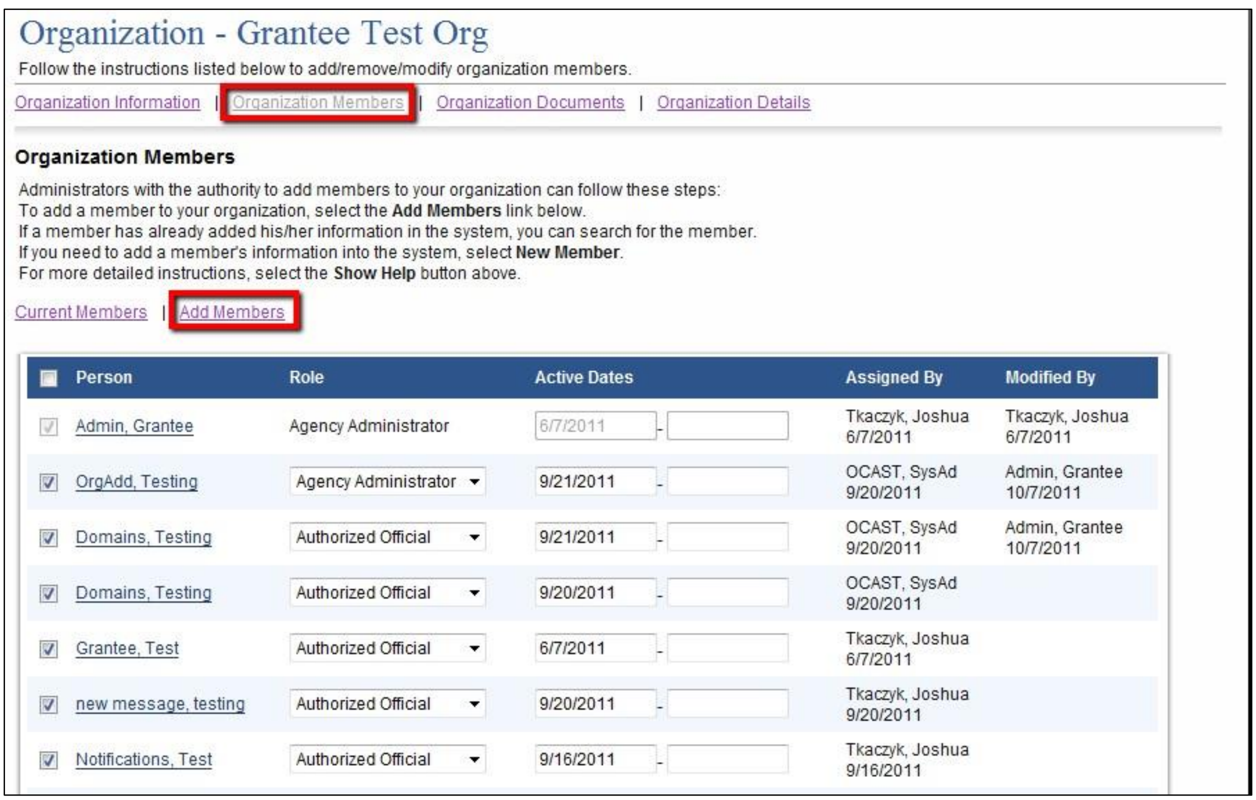


When the DAC system administrator grants access, an e-mail message confirming that the account has been validated will be received.

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

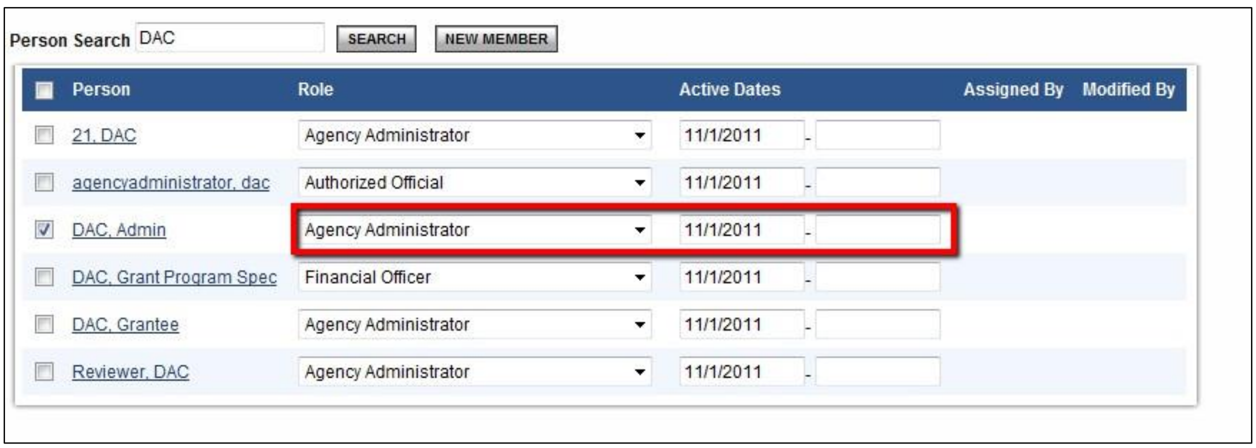
To add a new user to an organization, follow the steps indicated.

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

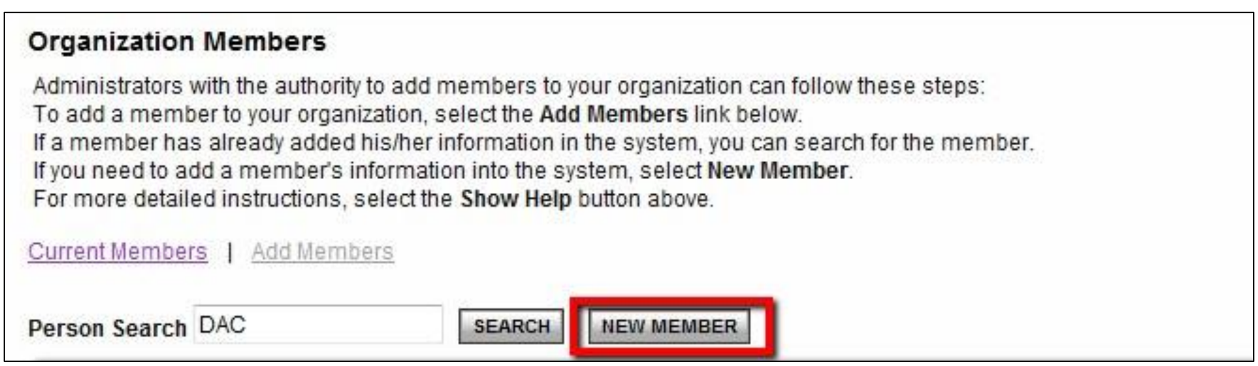


2. Click "Add Members", and a person search field appears. Type the first or last name of the person to add and select "Search." The results appear below.

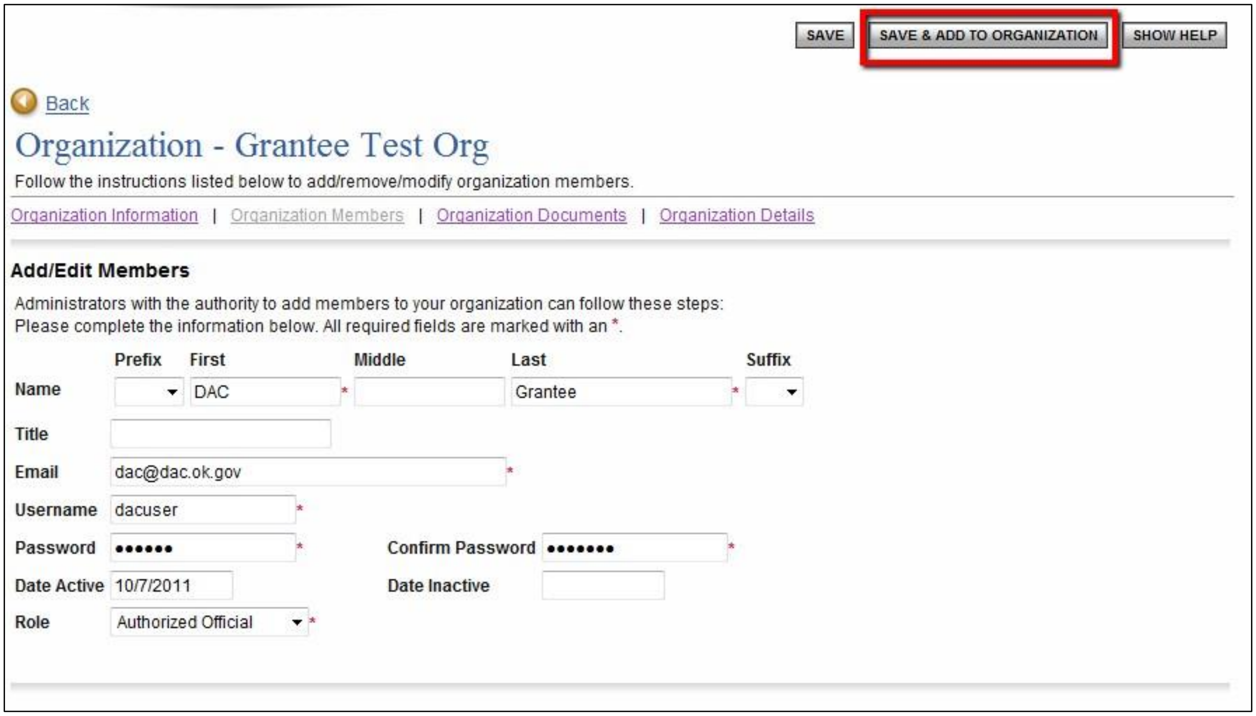
3. If the person's name appears, place a check in the box next to the person to add. Select a role, enter an active date (beginning), and "Save." Then select "Current Members" and the person added should show with the rest of the organization's member names. Click "Save".



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



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

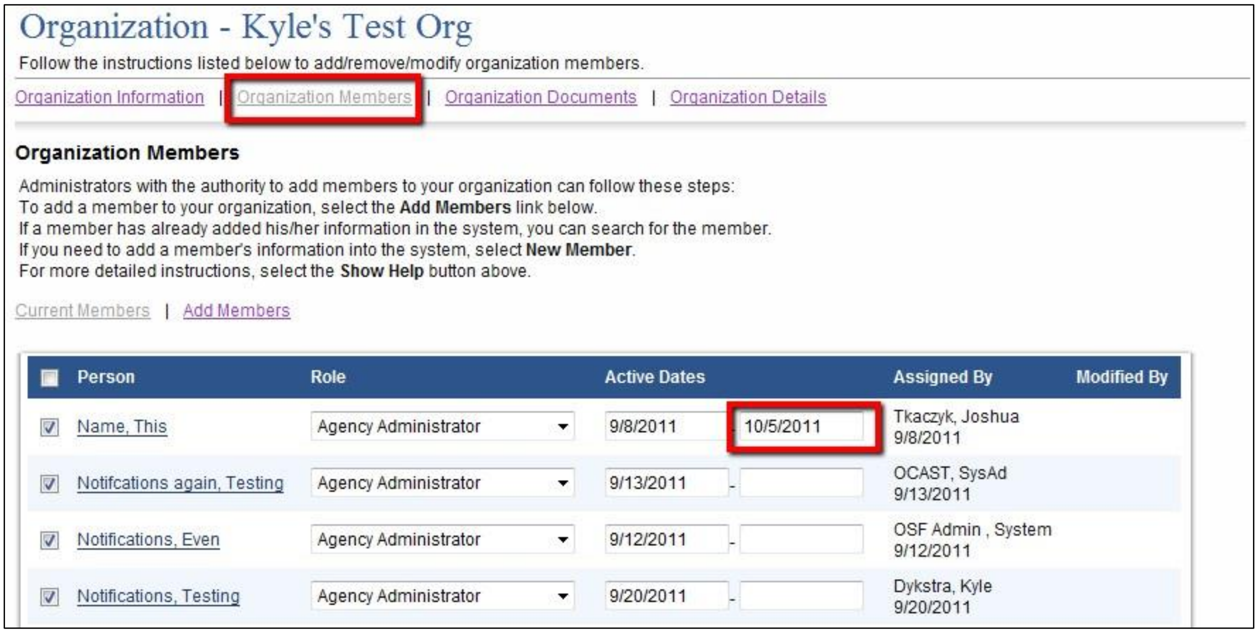


Note: "Save and Add to Organization" MUST be selected to add the new user to the organization.

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
Person
Role
Active Dates
Assigned By
Modified By
Name, This
Agency Administrator
9/8/2011
10/5/2011
Tkaczyk, Joshua
9/8/2011
Notifcations again, Testing
Agency Administrator
9/13/2011
OCAST, SysAd
9/13/2011
Notifications, Even
Agency Administrator
9/12/2011
OSF Admin , System
9/12/2011
Notifications, Testing
Agency Administrator
9/20/2011
Dykstra, Kyle
9/20/2011

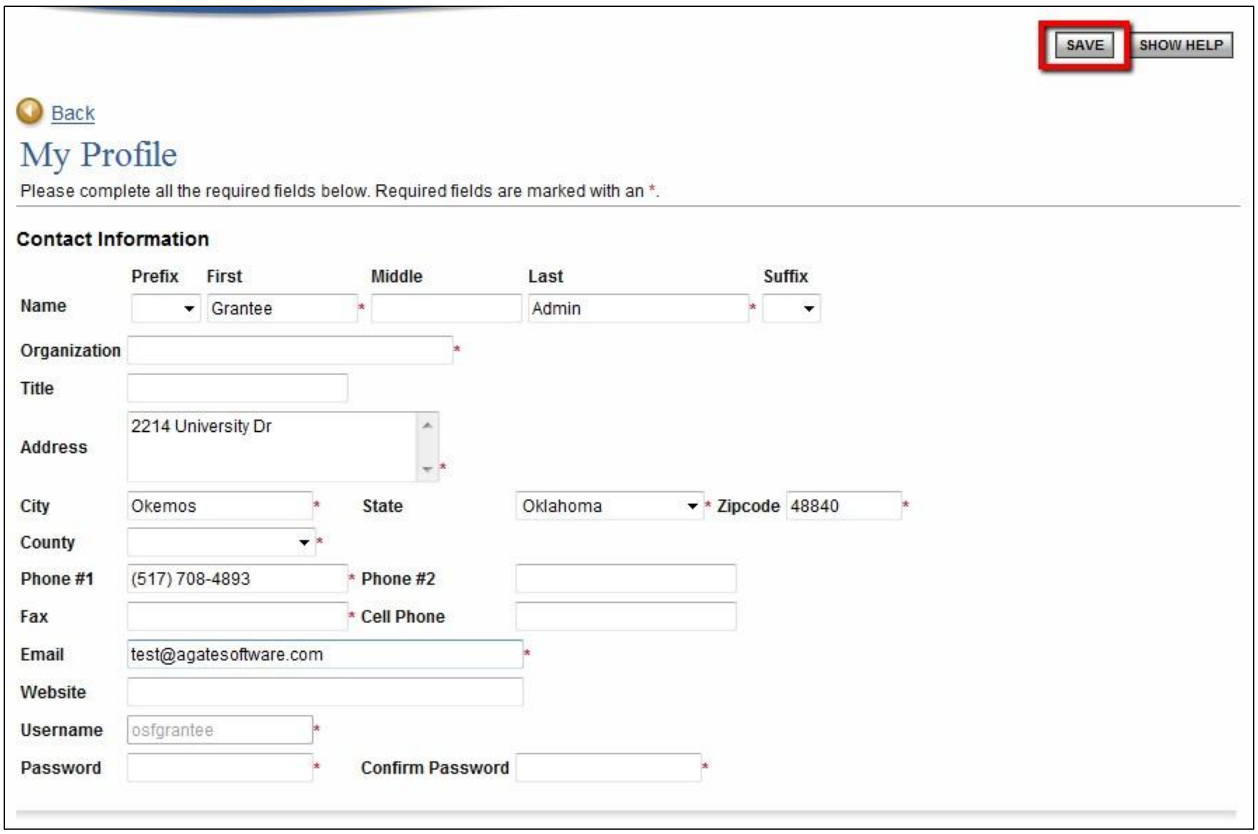
5. Keeping Contact Information Current

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"



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

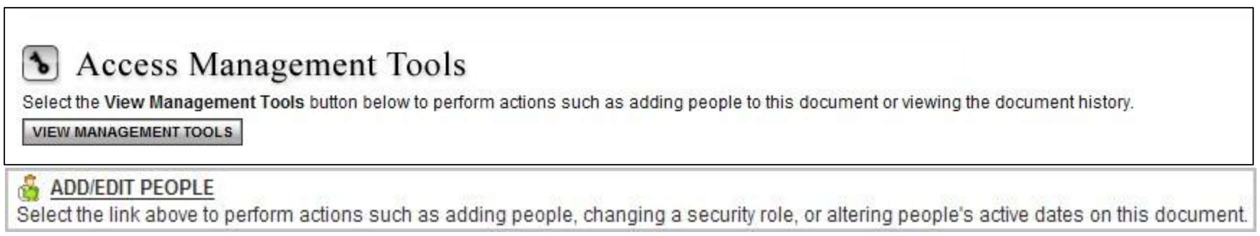
The Agency Administrator has administrative rights to add or remove an Authorized Official, Financial Officer, Writer, or Viewer to and from applications. Users with the Authorized Official, Financial Officer, Writer, and Viewer roles can be given access to the forms in the application.

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.

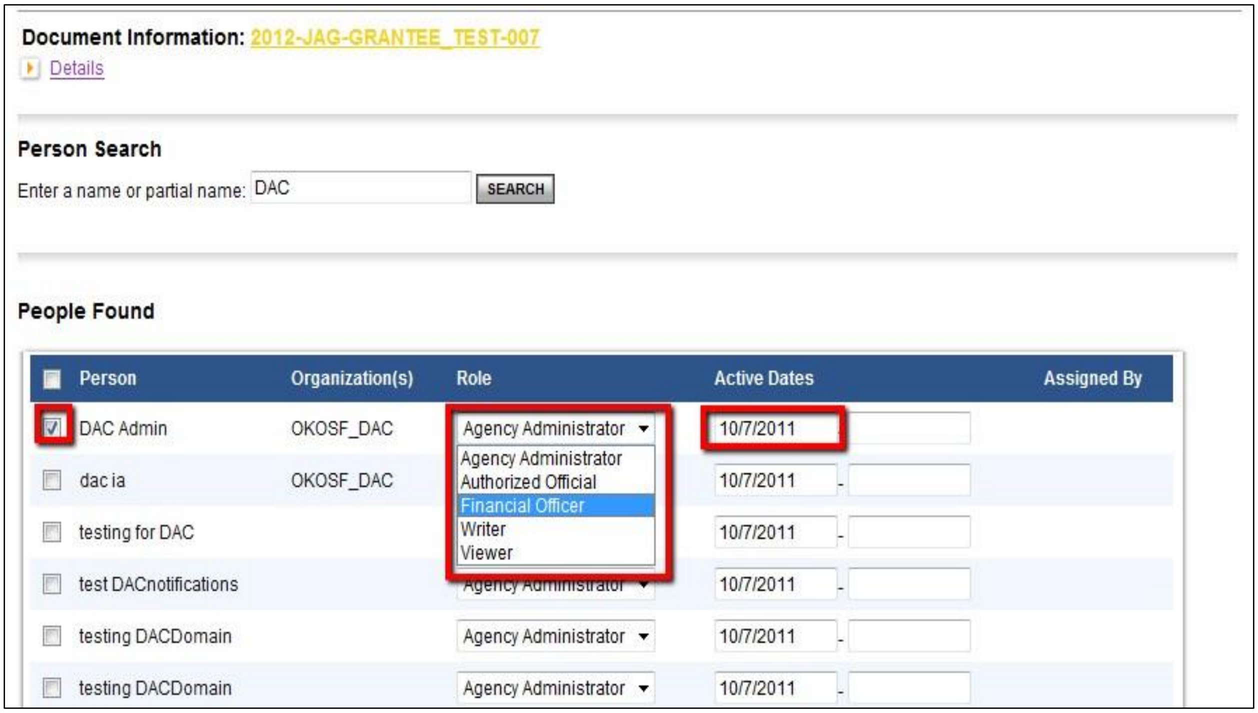
New users to OKGrants will not be automatically added to existing applications. However, any user may be manually added to the application throughout the entire application completion process.

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.



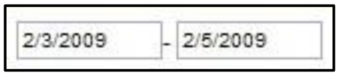
3. Type in the name of the individual in the search criteria box and click the "Search" button.
4. From the search results, select the person, give him/her a security role and fill in the Active Dates for the dates they should be able to access the application. Leave the 2^{nd} box blank for open-ended 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: DAC
SEARCH
People Found
Person
Organization(s)
Role
Active Dates
Assigned By
DAC Admin
OKOSF_DAC
Agency Administrator
Agency Administrator
Authorized Official
Financial Officer
Writer
Viewer
10/7/2011
dac ia
OKOSF_DAC
10/7/2011
testing for DAC
10/7/2011
test DACnotifications
10/7/2011
testing DACDomain
Agency Administrator
10/7/2011
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.



Or

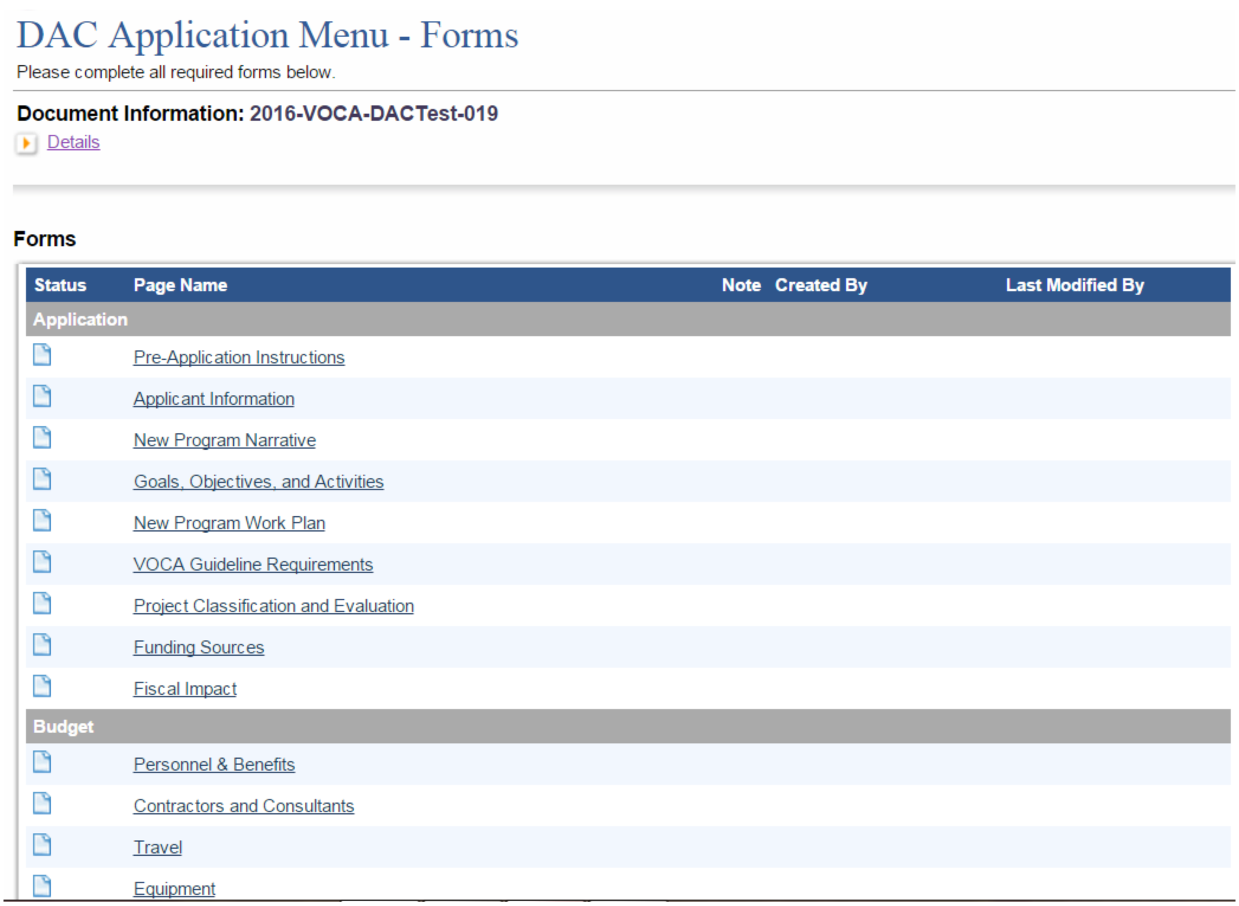
2. To remove a user, disable (uncheck) that user and click "Save".

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				
	Pre-Application Instructions			
	Applicant Information			
	New Program Narrative			
	Goals, Objectives, and Activities			
	New Program Work Plan			
	VOCA Guideline Requirements			
	Project Classification and Evaluation			
	Funding Sources			
	Fiscal Impact			
Budget				
	Personnel & Benefits			
	Contractors and Consultants			
	Travel			
	Equipment			

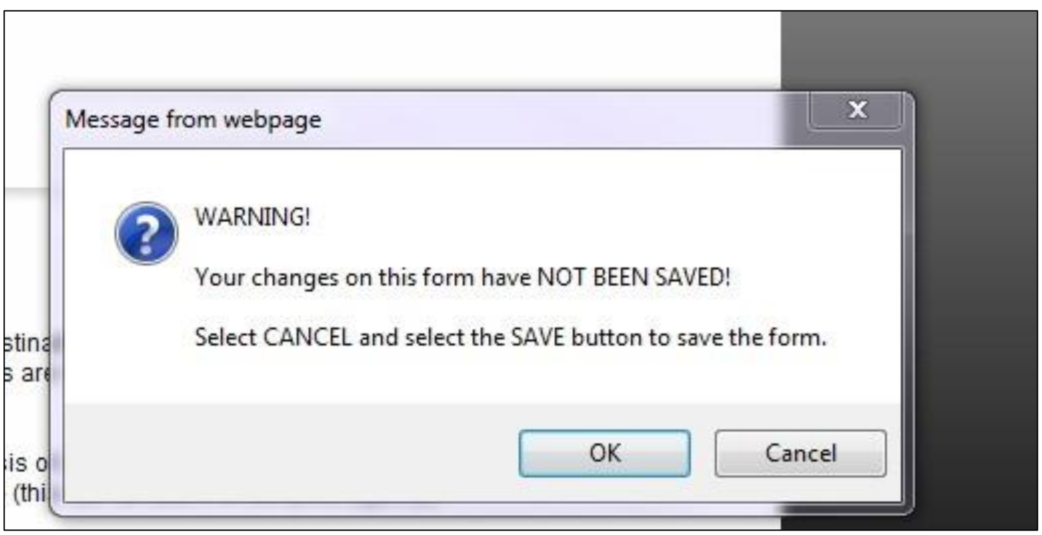
Follow the instructions on each form page to complete it.

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.

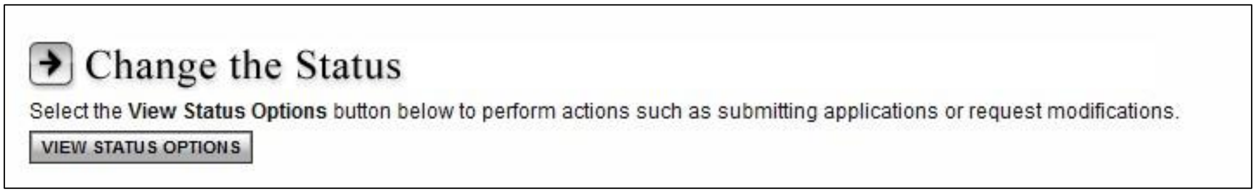
Select the “View Global Errors” button on any form to see any errors or incomplete pages in the application.

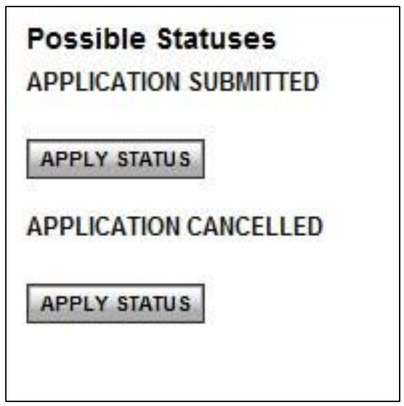
OKGrants also has a “Page Save Warning” feature, if any field in a form is changed, a pop-up box will appear if you attempt to leave the page without saving. Click “OK” to leave the page without saving, click “Cancel” to return to the form and save changes.



8.b. Change the Status

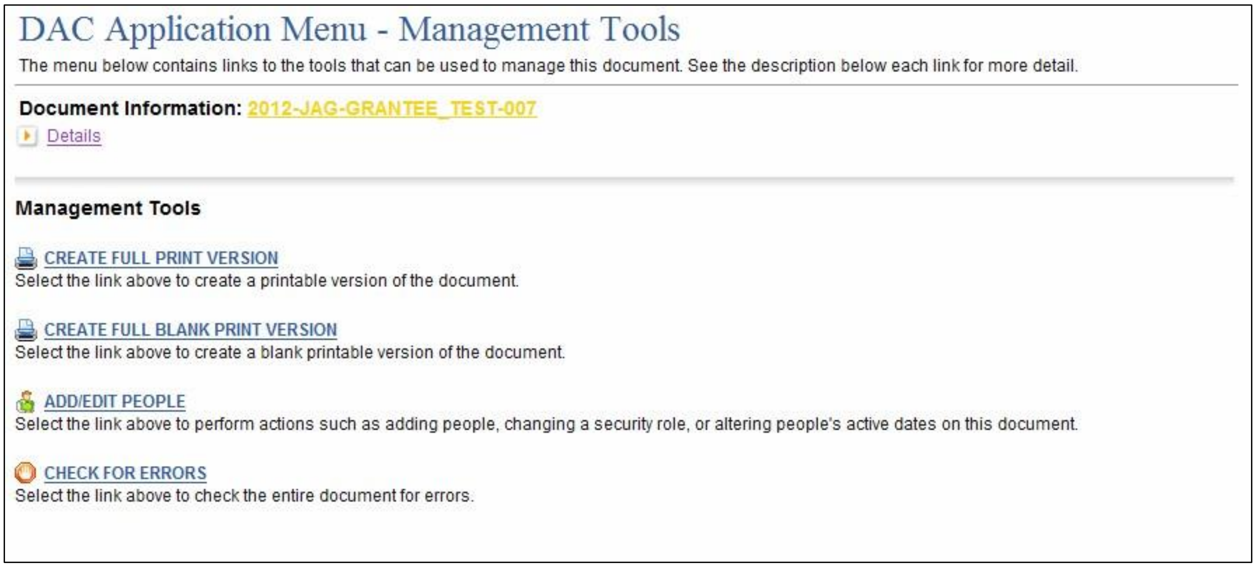
The “Change the Status” section allows an Agency Administrator or Authorized Official the ability to submit applications (or push the application to the next status level.) Click the “View Status Options” button to see what status push options are currently available. If this menu is blank, then the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





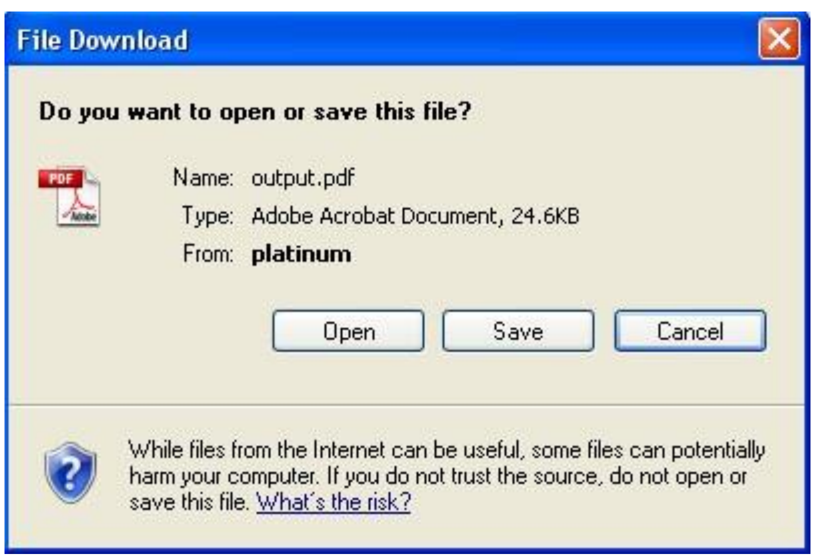
8.c. Access Management Tools

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.



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.

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.

9. Completing the Award Packet

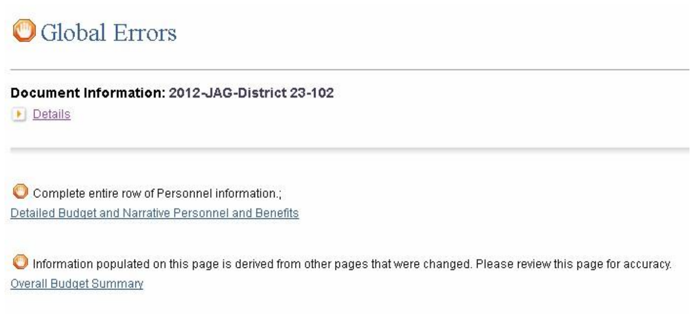
If the application is in Requires Signature status, the award documents are available for completion.

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.

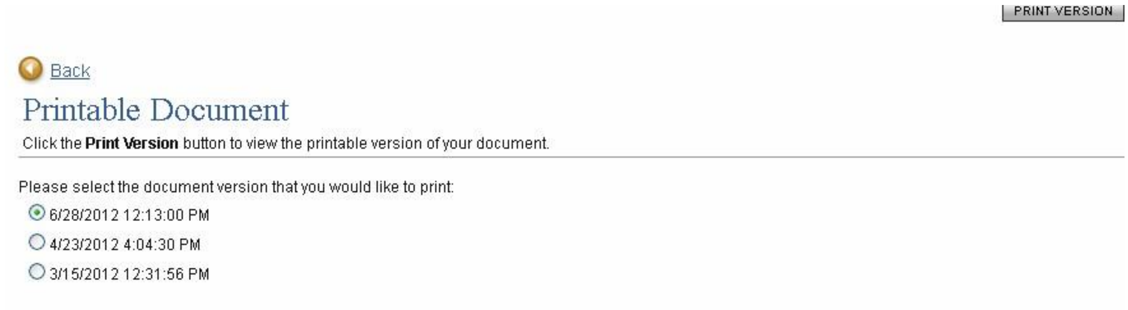
Once all forms are completed, navigate to the DAC Application Menu using the Document Identifier and select View Status Options under Change the Status. Signatures Submitted will be the only status. If you need to cancel or withdraw the application, contact a DAC System Administrator.

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.



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

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.

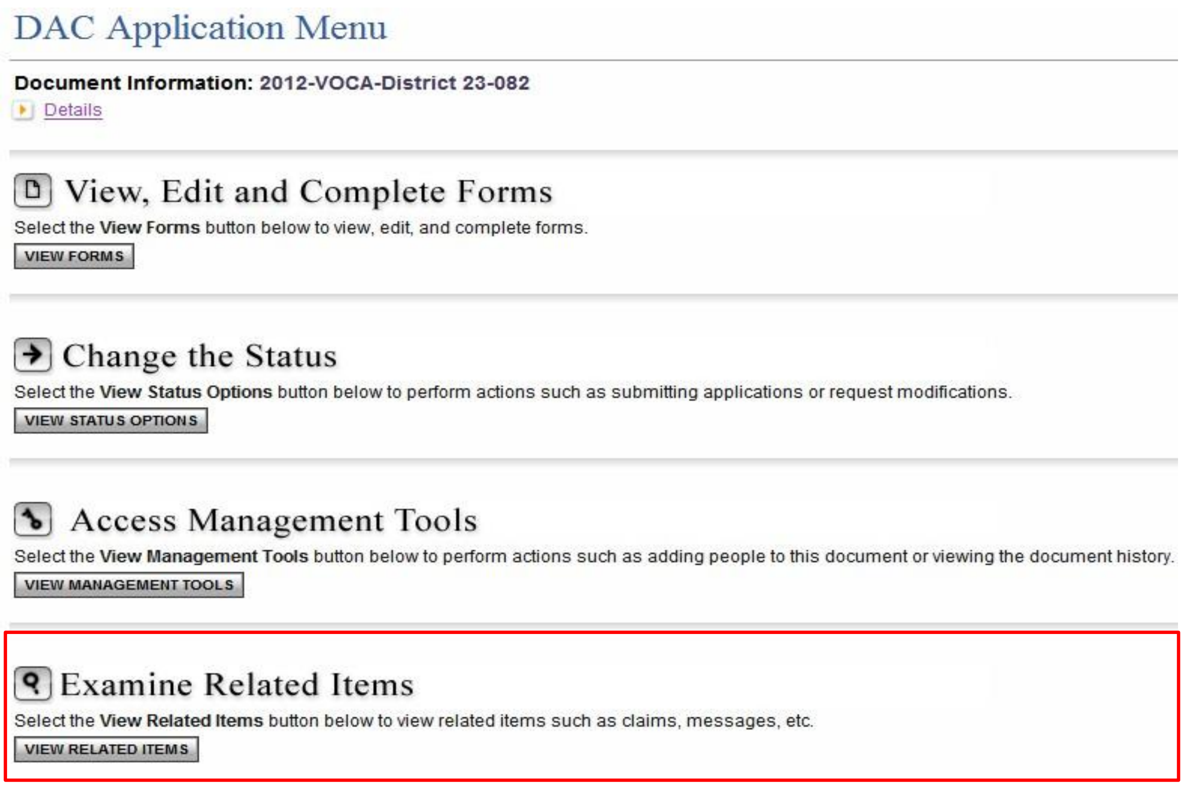


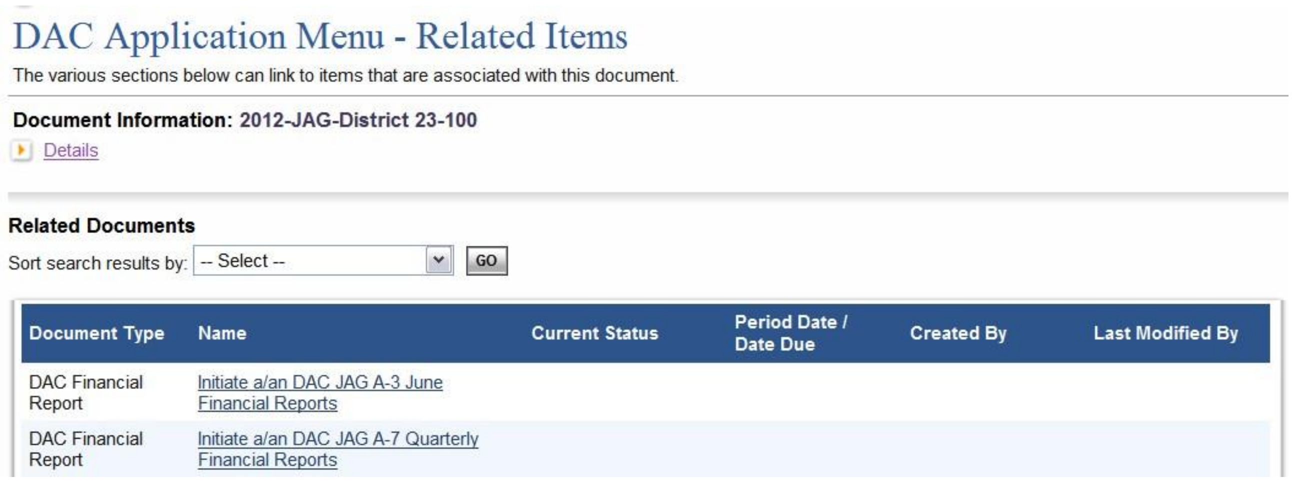
A DAC staff member will review the application and if modifications are required will change the status to Modifications Required.

10. Submitting monthly and quarterly financial forms

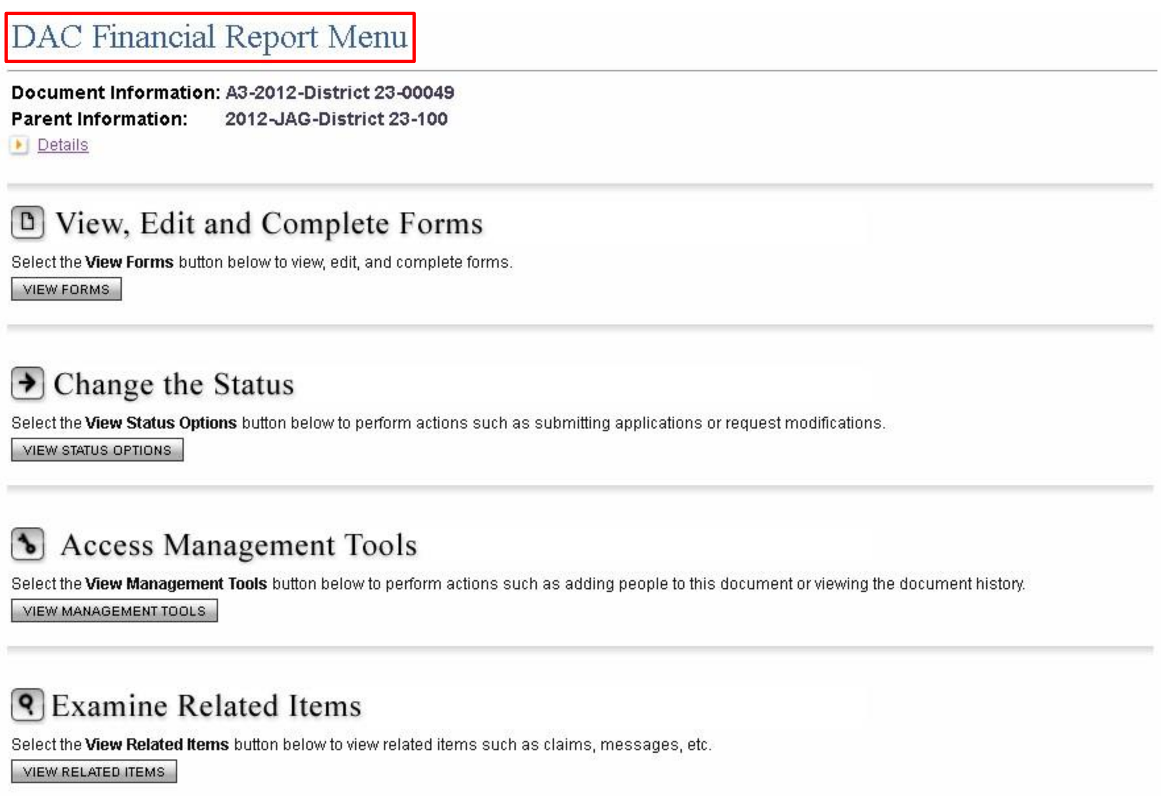
Once your application is in the Grant Awarded status, monthly and quarterly financial reports can be submitted.

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

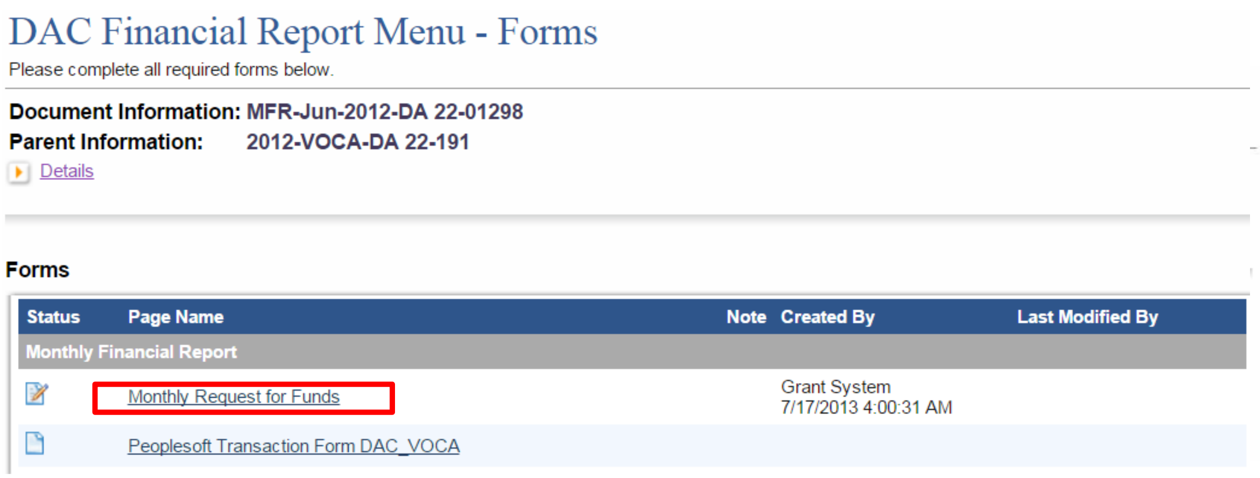




2. Select the appropriate form. After Agreeing, the program will display the DAC Financial Report Menu. PLEASE NOTE: The DAC Financial Report Menu layout is similar to the DAC Application Menu. Make sure you are on the correct Menu.



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



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

Amount of This Request:	
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
Personnel & Benefits	$28,662	$28,662.00			$7,166	$6,568.87		
Consultant/Contractor	$0				$0			
Travel	$0				$0			
Equipment	$0				$0			
Facilities/Rental					$0			
Supplies/Operating	$0				$0			
Other					$0			
Volunteer Hours						$0		
TOTAL								
Volunteer hours	Volunteer Match Hours Itemized					Hours @		
						Hours @		
						Hours @		
						Hours @		
						Total:		

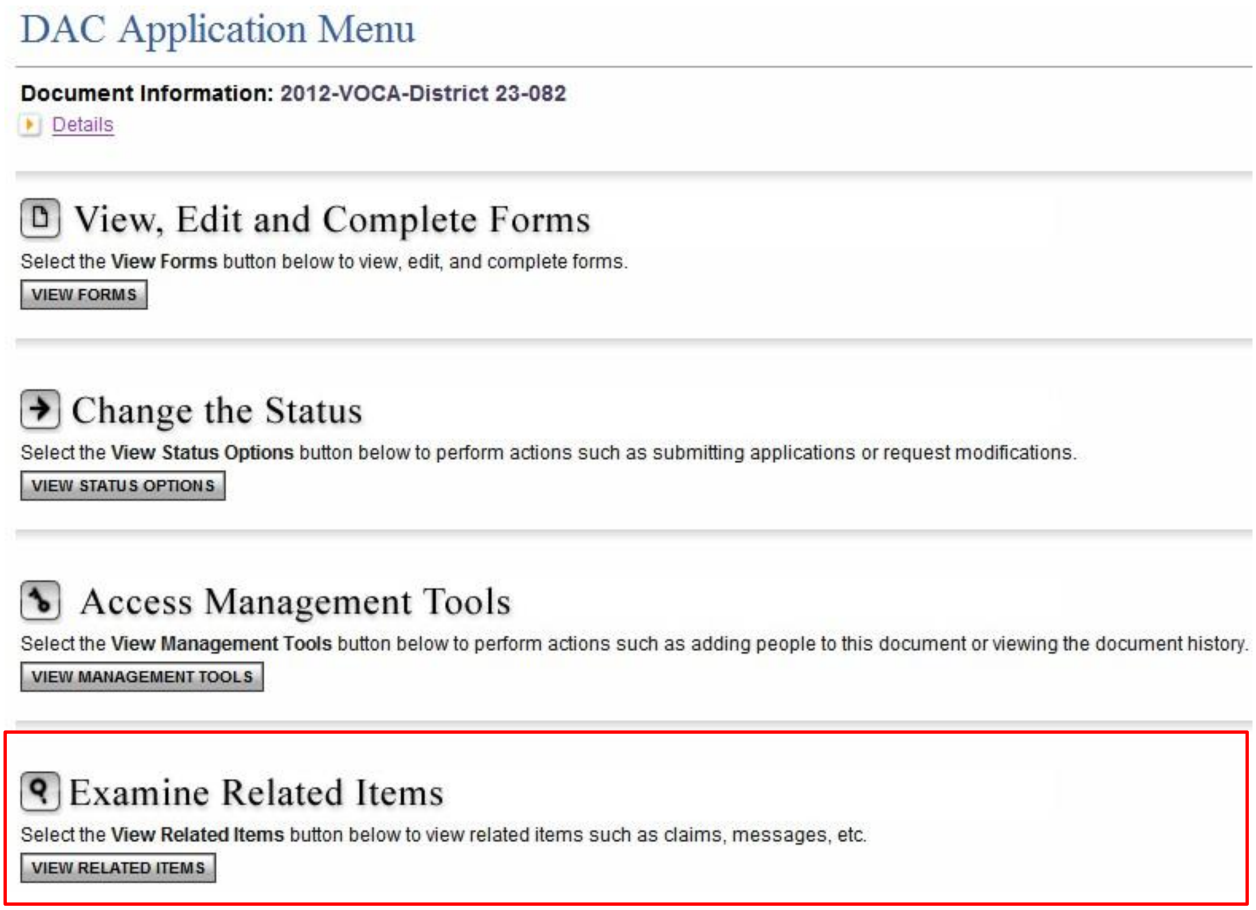
EFT Payment Memo

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.

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 - 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: -- Select -- GO

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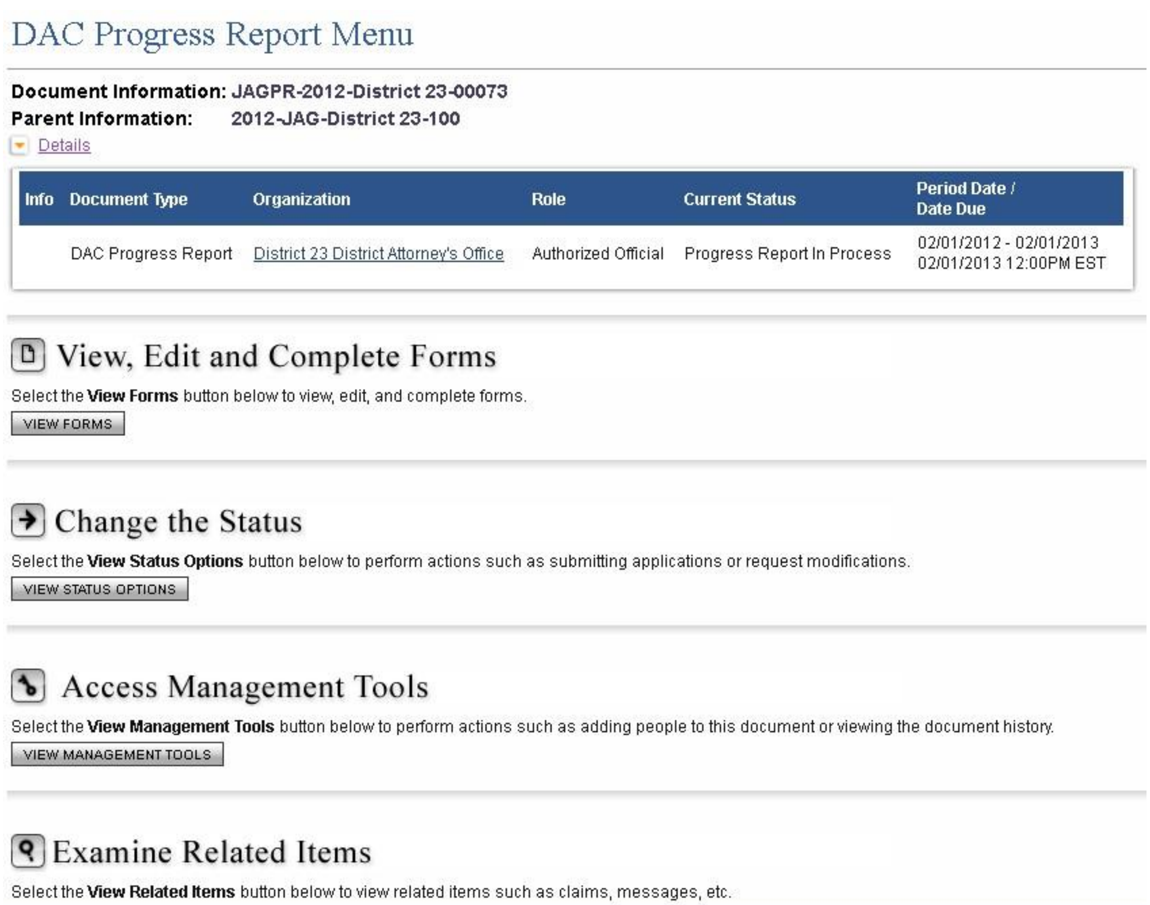
DAC Progress Report Menu

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	District 23 District Attorney's Office	Authorized Official	Progress Report In Process	02/01/2012 - 02/01/2013 02/01/2013 12:00PM EST

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