Texas Department of Transportation

Subgrantee User Guide

Version 1.1

eGrants System

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1. System Requirements

The eGrants System was designed so that the vast majority of computers 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.

The eGrants System requirements listed below can also be viewed on the system itself by clicking the "review the system requirements" link from the system homepage.

1.a. Operating System

The eGrants System 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

The eGrants is an Internet application. It is accessed via the Internet and was specifically designed for Internet usage. 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 the eGrants System, 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

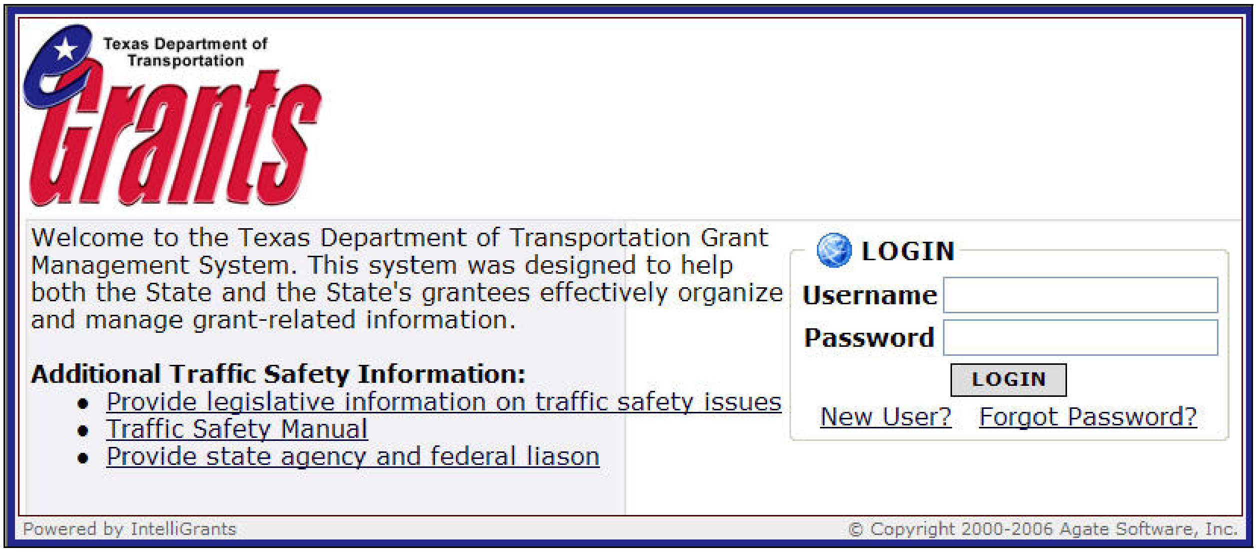
This system was designed to be compatible with common up-to-date web browsers including Internet Explorer, Firefox, Safari, and Opera.

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 one you can go to www.Adobe.com and download one for free.

2. eGrants System Homepage

To access the eGrants System, type ‘https://www.dot.state.tx.us/apps/egrants/’ 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 the eGrants System, please make the following configuration changes for the web-browser that you are using.

2.a.1 Internet Explorer

If you are using Internet Explorer, it is recommended that you add the eGrants 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 “URL for Texas” and then click the "Add" button
7) Click the "OK" button, and then click the "OK" button again

3. Subgrantee user types

There are two security roles defined for eGrants users: Subgrantee Administrators and Subgrantee Staff. These roles have different security access to work on the proposals. Once the Subgrantee Administrators are identified and their new user accounts created, the Subgrantee Administrators will select and enter their own organization's staff names to access eGrants. The organization's staff entered by the Subgrantee Administrators will be assigned to the Subgrantee Staff security level role. Each security role is summarized below:

Subgrantee Administrators will be able to:

- Create their own New User Account on Login Page; TxDOT will then assign them to the Subgrantee Administrators security role
- Add New Users to eGrants and assign organization staff to the Subgrantee Staff security role
- Edit and delete user account information for Subgrantee Staff
- Initiate available grants and apply for grant proposals
- Enter, update and delete information on proposals
- Download and attach files to the proposals
- Cancel an entire proposal before submission
- Submit proposals, such as STEP and General-TS online to TxDOT, with an agreement to terms and conditions
- Modify proposals with status of Modifications Required
- Check on the status of each proposal

Subgrantee Staff will be able to:

- Edit their own user account information
- Enter, update and delete information on proposals where permission is granted
- Download and attach files to the proposals where permission is granted
- Modify proposals with status of Modifications Required where permission is granted
- Check on the status of proposals where permission is granted

Security Roles	Control Access to Organization	Control Access to Proposal	Read	Write	Submit Proposal	Delete Proposal
Subgrantee Administrator	X	X	X	X	X	X

Subgrantee Staff			**X**	**X**		

4. Gaining access to eGrants

In order to use the system you must first be granted access to it. There are two basic ways to get access to eGrants.

You may either:

1) Request access to the system and get approved by a TxDOT system administrator

or

2) Be granted access by someone from within your own organization

Both of these processes are described below.

4.a. Gaining access through a system administrator

The first time that a user comes to the eGrants web site, they must create a new user account.
To create a new user account:

1) From the eGrants 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.

Having saved your contact information, your account must then be approved by an 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:

Your account has not been validated yet.

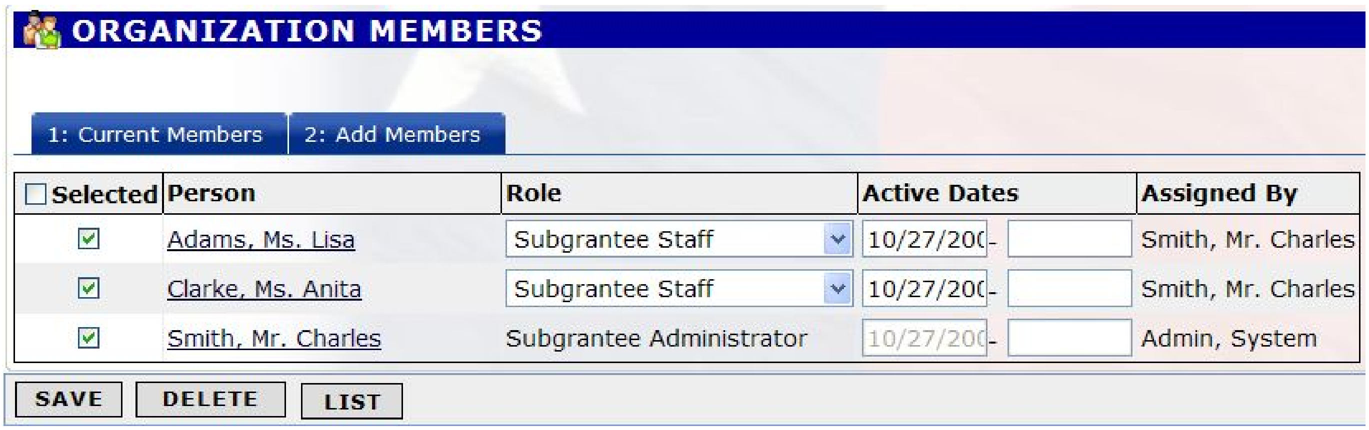
When access has been granted to you by a system administrator you will receive an email message confirming that your account has been validated. If you are assigned as a subgrantee administrator, you will now be able to begin creating other subgrantee accounts for your organization.

4.b. Gaining access through another in your subgrantee organization

The second way in which you can get access to the system is by having a subgrantee administrator from your organization add you to the system. In order for this to occur the user must be assigned the subgrantee administrator role.
1) The Subgrantee administrator must first login to the system.

2) From the Main Menu the organization's subgrantee administrator user must then click the name of the Organization for which they would like the new user added. (The subgrantee administrator will see the Organization's name as well as their role of subgrantee administrator.)

At the bottom of the Organization screen is an "Organization Members" section. By default the "Current Members" tab will be active and below it will be listed the various members of the organization. If the person whose account must be added is not shown, the organization's administrative user should click the "Add Members" tab.



3) After clicking the tab, the organization's subgrantee administrator user should first search for the person that he or she wishes 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 exists he or she will be shown below the search box. The "Selected" checkbox should be checked and the user should be assigned a role and a start date within the organization. Finally, the "Save" button must be clicked in order to add the user.
   b) If no users were found that matched the search criteria the organization's subgrantee administrator should proceed on with the following steps.
4) Having found no match in the system, the organization's subgrantee administrator should click the "Add New" button. Basic demographic information must be included for the user that requires an account. When the information has been entered, the "Save" button must be clicked.
5) The organization's subgrantee administrator should then return to the organization information page and follow steps 2 through 4a of this section to link the user to the organization.

5. Keeping contact information current

In order to receive continued funding or to enter into new grant agreements, it is important that your contact information be as up-to-date as possible. This is done very quickly and easily in the eGrants System. By keeping your user record and organization record current with all of the latest changes, TxDOT staff will be able to contact you appropriately when the need arises.

5.a. Updating your user record

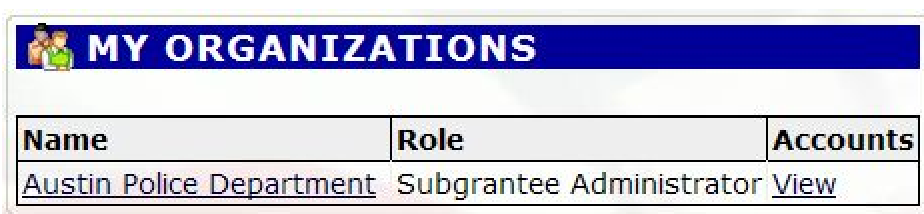
You may update your user record at any time by following these steps:

1) Click the “View/Edit My Information” link from the “My Information” section on the Main Menu.
2) Update the form accordingly and click the “Save” button.

NOTE: There may be links within the contact information section which may request for some additional information. If these links exist, please click the links and fill out the required information. An example of a link might be the “Mailing Address”.

5.b. Updating another user’s contact record

If you are the subgrantee administrator for your organization you may edit the contact information from others in your organization by following these steps:



1) Click the name of the organization of the person or people you would like to edit from the “My Organizations” section on the Main Menu.
2) At the bottom of the screen in the “Organization Members” section click the name of the person whose contact information you want to change.
3) Update the form accordingly and click the “Save” button.

5.c. Updating the information for your organization

Although it doesn’t typically occur that often, when your organization’s contact information changes it is important to update that information in the system by following these steps:

1) Click the name of the organization you would like to edit from the “My Organizations” section on the Main Menu.
2) Update the form accordingly and click the “Save” button.

NOTE: There may be links within the organization information section which may request for some additional information. If these links exist, please click the links and fill out the required information. An example of a link might be the "Mailing Address".

5.c.1 Deactivating a user in the system

A subgrantee administrator from an organization may choose to deactivate a member of the organization. A deactivated user will not be able to edit proposal related information for your organization. You may deactivate a member of your organization by following these steps:

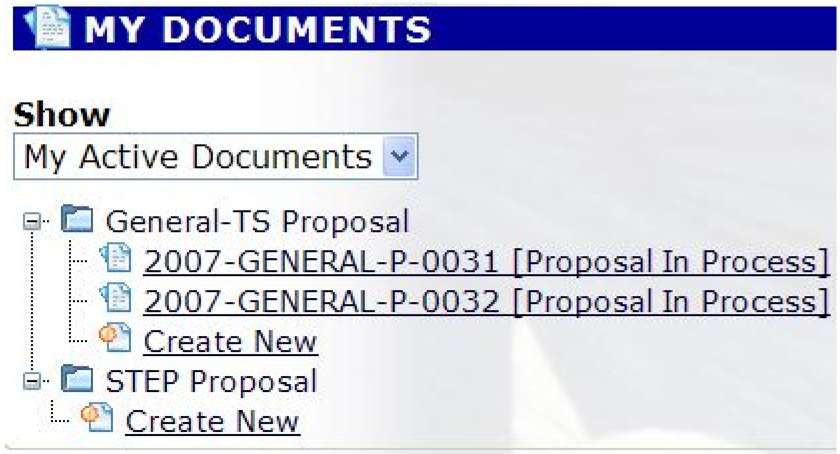
1) Click the name of the organization of the member you would like to deactivate from the "My Organizations" section on the Main Menu.
2) Change the second active date in the system to some day in the past for that user that you want to deactivate and then click the "Save" button.

6. Initiate a Proposal

The Subgrantee Administrator is the only subgrantee security role that may initiate proposals. In order to create proposals please follow these steps:

1) From the Main Menu, look at the 'My documents' section. This section will show you all of the proposals where you have existing proposals in the system, or where you may apply for a new grant proposal.

For those proposals where you can apply for a new proposal you will see a 'Create New' link. Click the 'Create New' link.



2) A confirmation page will appear asking for confirmation. Click the 'I agree' button. A proposal will be created and you will be taken to the 'Proposal Menu' to initiate the proposal.

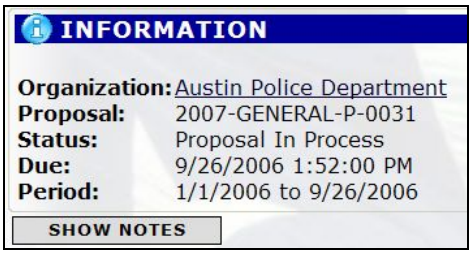
Following the creation of a proposal, a link to the record will appear back on the Main Menu for all of the proposals within the organization. The link to the proposal will appear in the 'My Documents' section under the name of the grant proposal. When logging back into eGrants, click this link to return to the proposal.

7. The Proposal menu

The Proposal Menu is organized into various sections that help to organize the proposal tasks and information. These sections are described below.

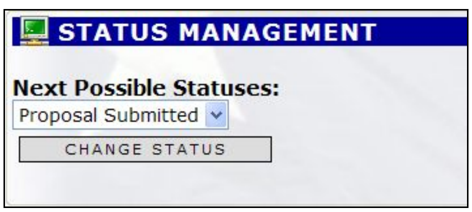
7.a. Information Section

The information in this section contains important information about the proposal such as the organization that initiated the proposal, the proposal identifier, and the status. This section also includes the ‘Show Notes’ button allowing for proposal notes to be added to the proposal.



7.b. Status Management Section

The Status Management section allows a subgrantee administrator the ability to push the proposal to the next status level.



7.c. Management Activities Section

The Management Activities section allows a subgrantee administrator certain administrative responsibilities such as the ability to add/edit organizations and people from the proposal and view the status history of the proposal.

7.d. Forms Section

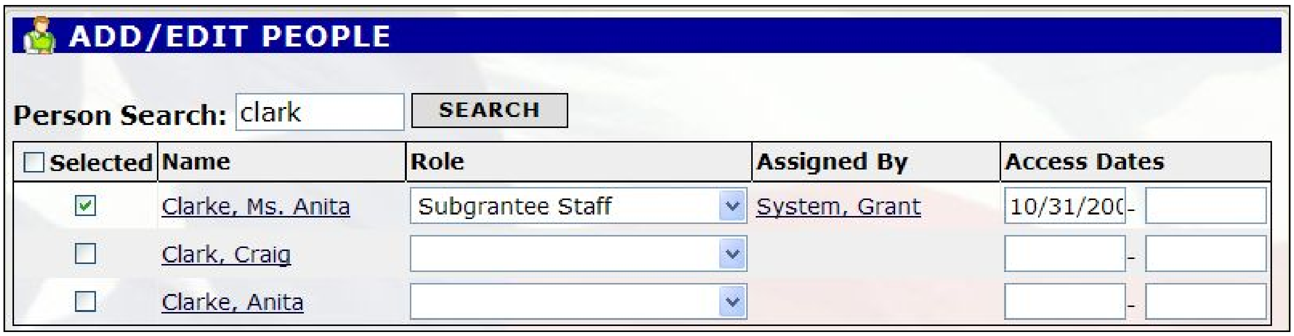
The Forms section is where the vast majority of the work in a proposal is completed. This section contains all of the forms that are necessary to complete prior to the proposal being submitted. To edit a proposal form simply click the name of the form.

8. Assigning users to a Proposal

The Subgrantee Administrator has administrative rights to add Subgrantee Staff to proposals. Users with the subgrantee staff security role can assist the subgrantee administrator with completing the forms in the proposal. Users may be added to the proposal through out the proposal completion process.

8.a. Assign User Access to Proposal

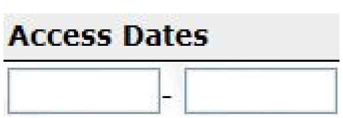
1) To add Subgrantee Staff to a proposal, the Subgrantee Administrator clicks on the proposal of choice in the 'My Documents' Section on the Main Menu.
2) Under 'Management Activities' choose the Add/Edit People link.
3) Type in the name of the individual in the search criteria box and click the 'Search' button.
4) From the search results, select the person, give him/her a security role (Subgrantee Staff) and fill in the access date you would like this individual to access the proposal.



8.b. Remove User Access to Proposal

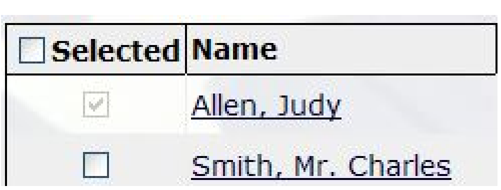
There is two ways to remove a user's access to a proposal. To remove a user's access to a proposal, on the proposal menu choose the 'Add/Edit People' link on the Proposal under Management Activities and:

1) Edit the access start and/or end date for the user.



Or

2) For the desired user, in the 'Selected' column, disable (uncheck) and save the page. The user will be removed from the page.



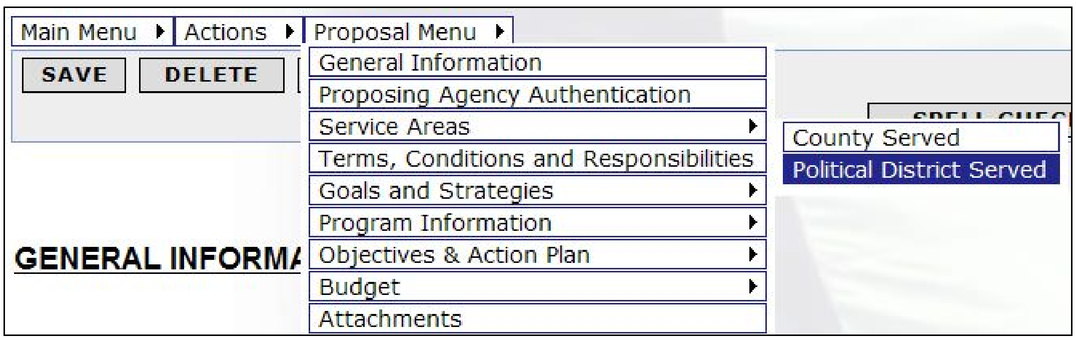
9. Proposal form completion

The various pages in the forms section of your proposal must be completed before it can be submitted. The following sections will lead you through the steps necessary for accomplishing that goal.

9.a. Forms Navigation

There are two basic methods for navigating through the forms of your proposal. You may either use the Menu at the top of any page within the proposal, or you may use the treeview on the Proposal Menu.

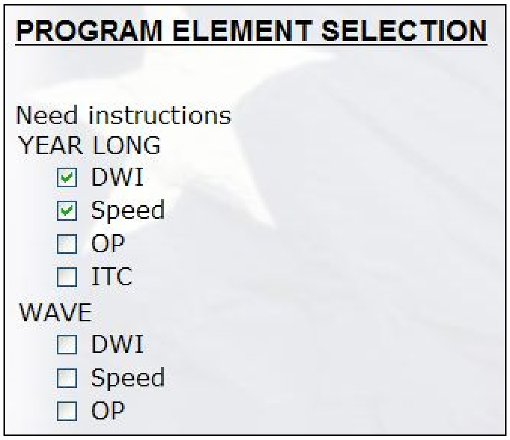
The image shown below is the Menu with the “Political District Served” link highlighted by the cursor. To return to the Main Menu from this menu simply click the “Main Menu” link to the far left. To select a particular form in the proposal, hover over the “Proposal Menu,” then the section of the link you want to access, and then click the link.



The treeview on the Proposal menu is another way to navigate to each of the forms in the proposal.

9.b. Program Element

Some Proposal types may require the selection of a program element. If the particular proposal has a “Program Element Selection” link in the ‘Forms’ section, use this link to select the program element(s) that apply for this proposal. The selection made will be used to determine which additional forms are necessary to complete your proposal. In order to see the forms for that particular program element, you must check the desired checkbox and then click the “Save” button. The forms for that program element will then appear on your treeview.

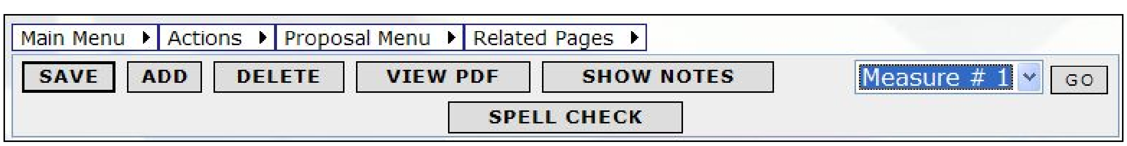


9.c. Form Completion

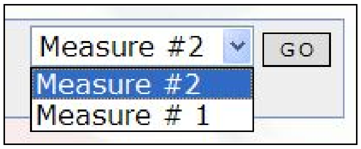
When filling out an application form it is suggested that you first complete all of those fields for which you have information. Not everyone in each organization will have all of the information necessary to complete each form. Complete as much of it as you can and then click the "Save" button. Fields followed by red asterisks are required fields.

In the creation of some forms the "Add" button was used to create additional forms. Any form that has an "Add" button allows you to have multiple instances of that form.

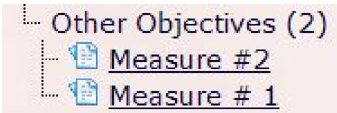
The following picture shows that on the "Other Objectives" page that multiple pages can be created for that page.



When multiple positions have been created for this particular form, you can choose between. A dropdown will appear on the far right of the button toolbar.



When additional pages have been created, a number in parentheses will appear after the link to indicate the number of pages connected with the particular link.



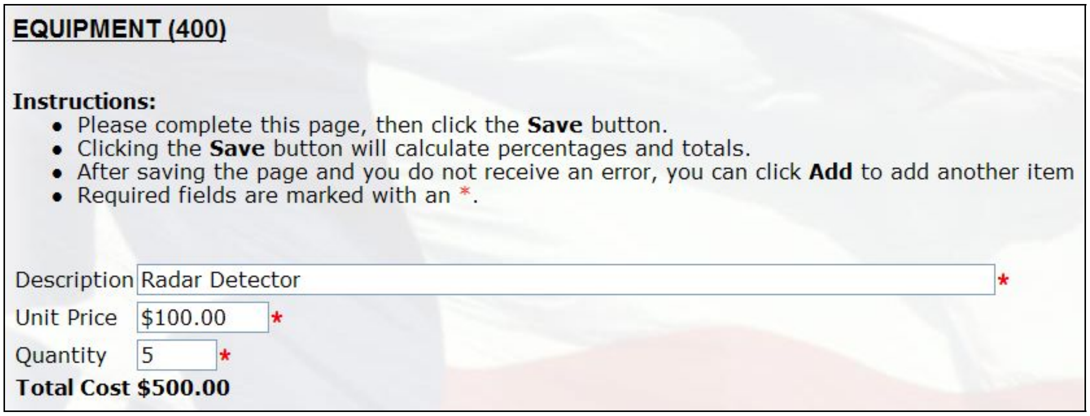
9.d. Budget

This section of the proposal forms is where the budget data is collected. Subgrantee Administrator and Subgrantee Staff security roles enter information into the various links in the budget portion of the proposal. Budget pages contain individual pages for capturing information like salaries and wages and equipment information. Information that is entered on these pages will then be displayed on the budget summary page.

The budget summary page may be used to view the entire budget. It is important to save the budget summary page after all budget pages are completed. This will insure that all summary information is calculated from the individual budget pages.

9.e. Automatic Calculations

When possible, the eGrants System will automatically calculate totals for you. The 'Equipment' page is a good example of this. When the page is saved the system will use the values that you have entered for the unit price and quantity to calculate the 'Total Cost.' (Please see "Total Cost" box below). The system will show you these values and will use them to automatically generate other totals as well. Remember to click the forms 'Save' button in order to calculate the form calculations.

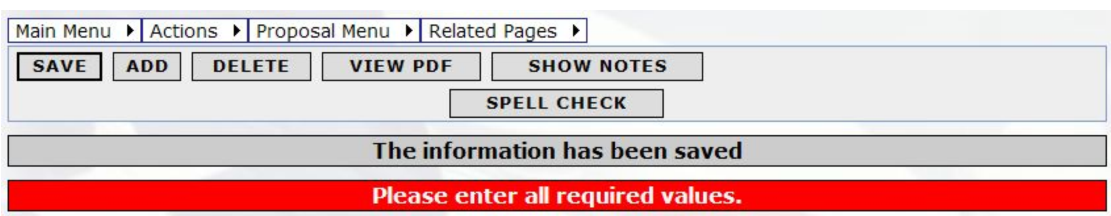


9.f. Budget Summary Calculations

The eGrants System creates your budget summary for you based upon the budgets information that you enter for each category. The system will automatically sum these values into the budget summary. In this way, there will be far less math required to complete the online application.

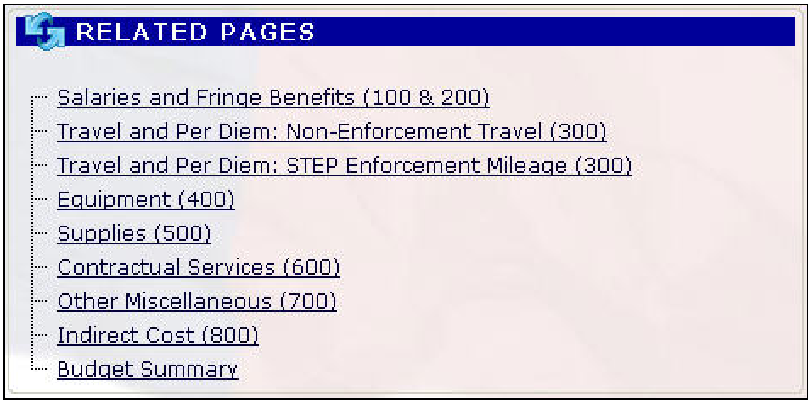
9.g. Error Messages

If any information is not completed within a proposal form in its entirety or there are mistakes, an error message will be displayed in red across the top of the page. During form completion it is not necessary to correct form errors right away. You may return to the form and fix errors at any time and if for some reason any errors remain when the proposal is submitted, eGrants will require the errors to be fixed before the proposal submission is completed. See the example below.



9.h. Related Pages

Some pages like the budget pages will have related information. When this occurs, once you save information from a link located in the ‘Forms’ section, you will receive a treeview of the related pages near the bottom of the page. To access one of these links, simply click the available link.

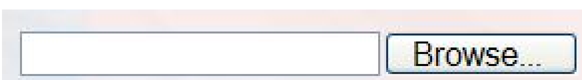


You can also access these pages using the links located at the top of the page.

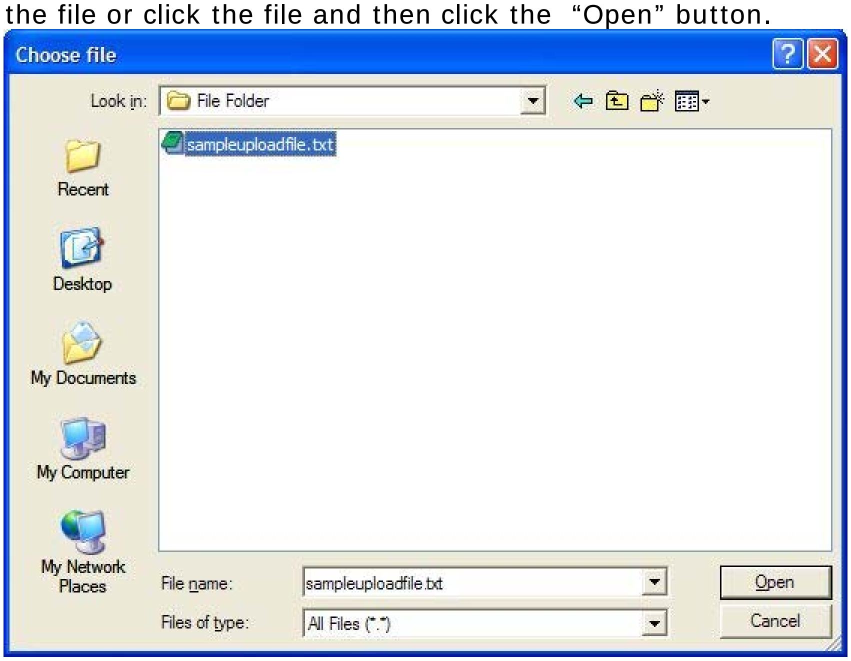
These related pages directly relate to the link that was just completed and saved.

9.i. Uploads & Attachments

For some pages, form fields are not enough to capture the type of information that may be required. In those situations, a file upload field may be provided to allow you to upload a file instead. Files of the following types are allowed as uploads, bmp, doc, gif, jpg, pdf, png, ppt, tif, txt, wpd, and xls. To upload a file, click the “Browse” button.



Browse to the folder that contains the file you would like to upload and either double-click the file or click the file and then click the “Open” button.



After the page reloads, you must then click the page “Save” button to save the uploaded file.

9.j. Printable Versions

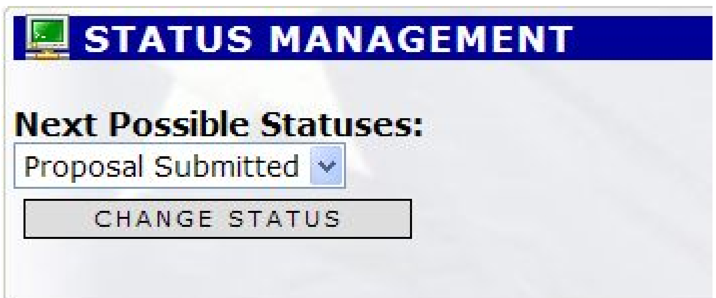
Although on any page you can choose to click “File”, “Print” to print the page, a better printing option exists. In many pages a “View PDF” button will be available that will automatically create a PDF for you with the data that you provided in the form included within it. These dynamic PDF’s can be printed, or saved to your computer for reference.

10. Submitting your Proposal

The Subgrantee Administrator security role is the only role authorized to submit your Proposal. When the Proposal is believed to be complete and no more changes are required, the Subgrantee Administrator can choose to submit.

It is important to note that once a proposal is submitted it will enter into a read-only status and cannot be changed!

To submit, the Subgrantee Administrator must choose the 'Proposal Submitted' status in the Status Management section on the proposal menu and then click the "Change Status" button. If any errors exist in the proposal they will appear at that time and must be fixed before it can be submitted. If no errors exist, the Subgrantee Administrator will be prompted to confirm his or her decision.

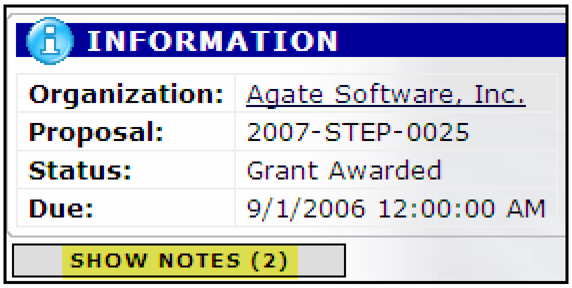


11. Notes

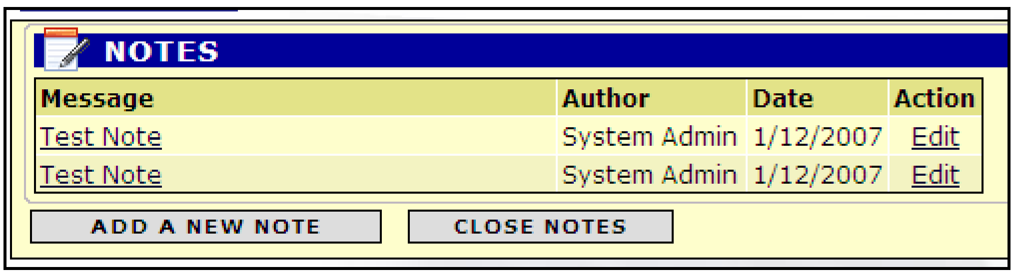
eGrants allows for proposals, request for reimbursements and performance reports to have notes attached to them. These notes may be used to communicate to other organization staff members or to TxDOT staff who are assigned to the proposal. Notes may be added on the main menu or on specific forms.

11.a. Adding and Editing Notes

1) Click on the ‘Show Notes’ button.



2) Any existing notes will be shown at the top of the new window.



   a) Each note has the following information: message name, author, date, and action.
   b) By clicking on the message name, the note will expand showing the entire note’s message.
   c) By clicking on either edit or reply under the action column, a note may either be edited (by the user who created the note) or replied (by another user).

3) To add a new note:
   a) Click Add a New Note, type in the subject, message, and check the user(s) the note is meant for and click save.

4) Click the ‘Close Notes’ button to close the notes Window.

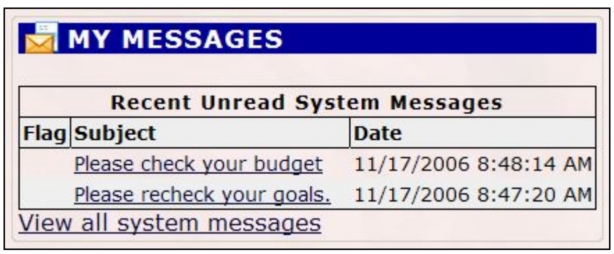
12. Automatic e-mail notifications

12.a. Automatic E-mail Notifications

Automatic email notifications may be sent to you periodically throughout the grant year. These messages will be sent via the system according to an automatic process or as the result of a user triggered event. These messages might accompany the creation of a proposal, the submission of a proposal, or a pending due-date that is approaching. These messages are intended to help you know what is occurring in the system that pertains to you or your Organization. These messages may also be sent by TxDOT personnel.
In order to receive these messages it is important that you include an active, frequently used email address when creating your contact record in the system. If you provide an incorrect email address or an address to an account that is either inactive or full, you will not be able to receive these important messages.

12.b. System Messages

In addition to the automatic email notifications, there is an area referred to as the System Messages that manages messages sent to you either from the system itself or from TxDOT personnel. You can view or edit your System Messages by following these steps:



1) Click the Subject of a message or click the “View all system messages” link from the My Messages section on the Main Menu.

a) Clicking the Subject of a message will take you to the message itself. You can read the message from that screen and then may perform any of the following actions:
   (1) Click the “List” button to view a full list of your messages in your My Messages folder.
   (2) Click the “Delete” button to delete the message.
   (3) Choose a folder from the dropdown list and click the ‘Go’ button

b) Clicking the “See All” link will bring you to the ‘My Messages folder’ where you may perform any of the following actions:

   (1) Click the Subject of a message to read a message in the folder.
   (2) Click the “Folder Administration” button to create a new folder in which to store system messages.
   (3) Click a folder name to see all of the messages in that folder.

Automatic email notifications and system messages will help you to know the events that are occurring in the eGrants System and will keep you up-to-date on the progress of your proposal related items.

