

Oregon Department of Aviation



ODA Grantee User Manual

eGrants System
Version 1.0

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1. System Requirements

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

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

1.a. Operating System

The eGrants System was designed for both 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 System 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 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

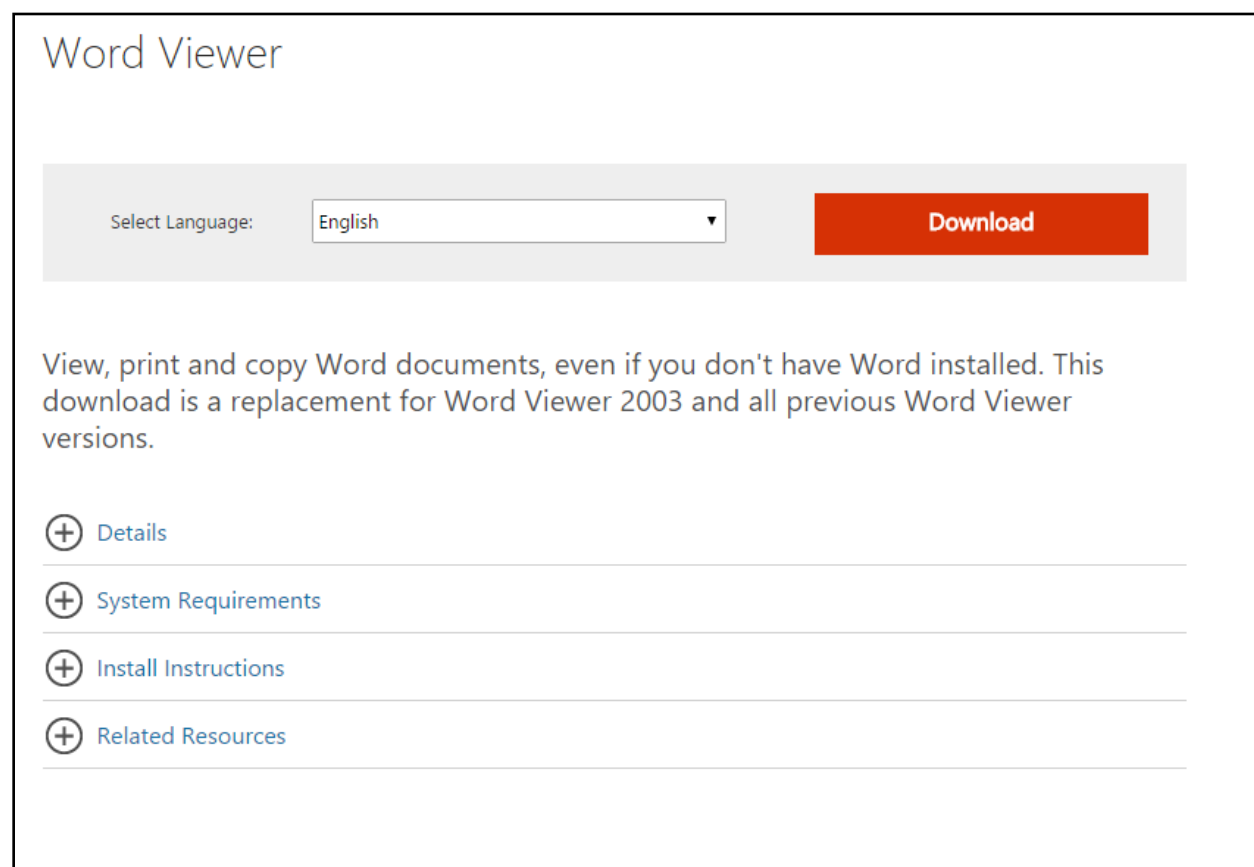
This system was designed to be compatible with common up-to-date web browsers including Internet Explorer, Firefox, Safari, and Opera.

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 your computer is not equipped with Adobe Acrobat Reader, simply go to <https://get.adobe.com/reader/> and download (this is a free download!).

1.e. Microsoft Word Viewer

Since 2009, eGrants has transitioned to HTML code that displays in Microsoft Word instead of the Adobe PDFs. Using Microsoft Word increases eGrants formatting options and reduces the amount of empty space on the printed pages. There are no extra steps needed to use this new functionality, except you will need to have Microsoft Word or Microsoft Word viewer installed on your computer. Microsoft Word viewer can be downloaded and installed for free by navigating to <https://www.microsoft.com/en-us/download/details.aspx?id=4>. Once you have selected the appropriate language, hit the 'Download' button.



1.f. Microsoft Excel Viewer

Certain functions within the eGrants, such as Management Reports, will output documents in Excel format. If you do not currently have a version of Microsoft Excel installed on your computer, you may want to download the Microsoft Excel Viewer to view these generated reports. Microsoft Excel Viewer can be downloaded and installed directly from Microsoft in similar fashion as the Microsoft Word Viewer. If you have need to view these types of documents, please navigate to the hyperlink below to download and install the program.

<https://www.microsoft.com/en-us/download/details.aspx?id=10>

2. eGrants System Homepage

To access the eGrants System, type www.ODAE-grants.com into the address bar of your web browser and hit "Enter".

The page you see should look like the image shown below.

Oregon Department of Aviation (ODA) e-Grants

Welcome to the ODA e-Grants system, where you may apply for and manage your ODA grant applications and reports. For an overview of the grant opportunities available through e-Grants please visit the [ODA website](#).

Steps to Get Started:

For New Users within Existing Organizations:

- Contact an existing Program Manager within your organization to have them add you to the organization with the appropriate permissions.
- For more information please consult the [ODA e-Grants Applicant User Guide](#).

For New Organizations:

- Initial registration for an organization must be completed by ODA staff. Please complete the [e-Grants Organization Registration Request](#) and e-mail it to asap@aviation.state.or.us.
- ODA will then add a Program Manager to the organization and communicate the proper login credentials to that individual.

If you have any questions or concerns regarding registering for the Oregon ODA e-Grants system, please contact Program Coordinators at asap@aviation.state.or.us.

2.a. View Available Opportunities

In the "View Available Opportunities" section of your homepage, you will find any document that meets the following criteria:

- Document(s) which your current security role has permission to initiate.
- Document(s) which are available for initiation as per the document availability dates.

View Available Opportunities

You have 2 opportunities available.
Select the **View Opportunities** button below to see what is available to your organization.

VIEW OPPORTUNITIES

NOTE: Documents that are considered sub-documents to other documents (e.g. Request for Reimbursement) will not be in the “View Available Opportunities” section, and will instead be available through the “Related Documents and Messages” section of the parent document.

Some documents also have specific settings for how many are allowed per organization. ODA may set certain settings that allow only one application per organization, and if one has already been initiated for a given organization, they will not be able to locate the opportunity in this section.

The screenshot below is a representation of the “Opportunities” menu.

My Opportunities

To apply for an item listed below, select the **Apply Now** button below each description.

RESET MY OPPORTUNITIES

COAR Program Application for PRESTIGE WORLDWIDE
Offered By:
Oregon - Department of Aviation

Applications Availability Dates:
11/01/2016-11/01/2017

Applications Period:
11/01/2016-11/01/2016


Applications Due Date:
11/01/2017

Description:
The Critical Oregon Airport Relief Grant Program, or COAR, is a funding program available to all public-use airports in Oregon. Please click “Apply Now” to submit an application for the **2017-18 COAR Grant Cycle**.

APPLY NOW **NOT INTERESTED**

2.b. My Inbox

The “My Inbox” section of the homepage will display all system notifications that have been sent to you. Typically, these notifications will be messages sent based on another user’s actions. To expand the “My Inbox” section, click on the “Open Inbox” button.

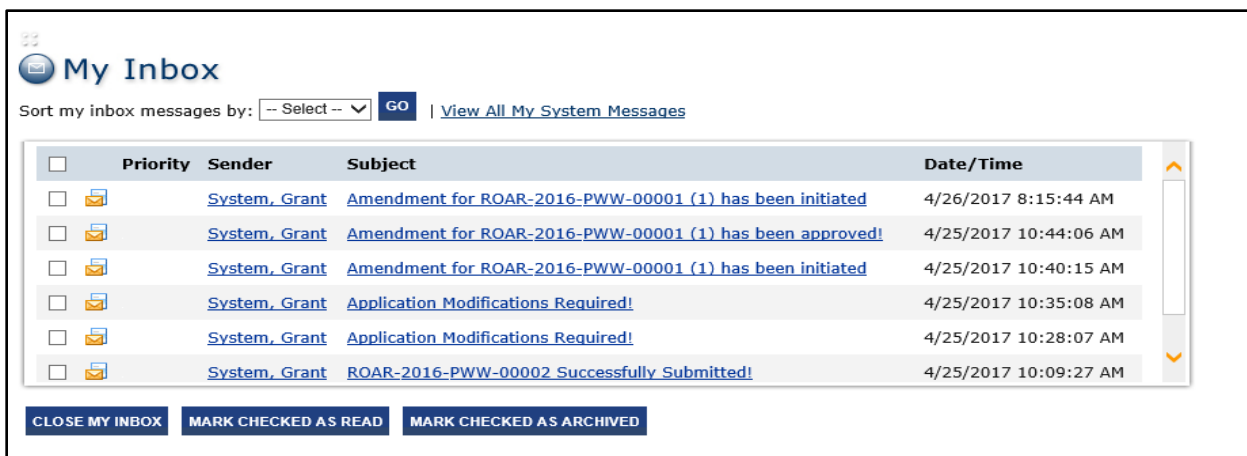


My Inbox

You have **7** new messages.
Select the **Open My Inbox** button below to open your system message inbox.

OPEN MY INBOX

To read the full message, click on the subject line of the target message, as displayed in the screenshot below.



My Inbox

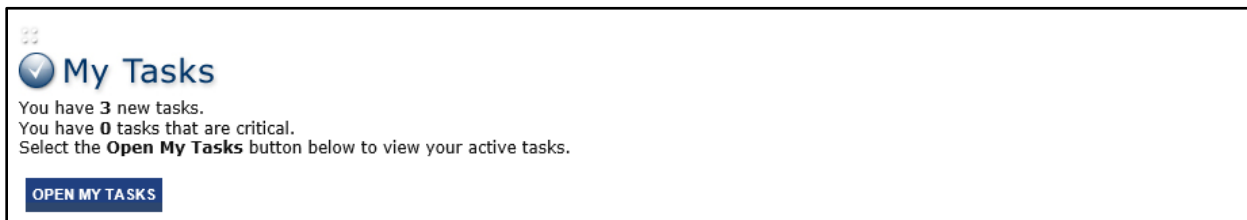
Sort my inbox messages by: -- Select -- **GO** | [View All My System Messages](#)

<input type="checkbox"/>	Priority	Sender	Subject	Date/Time
<input type="checkbox"/>	High	System, Grant	Amendment for ROAR-2016-PWW-00001 (1) has been initiated	4/26/2017 8:15:44 AM
<input type="checkbox"/>	High	System, Grant	Amendment for ROAR-2016-PWW-00001 (1) has been approved!	4/25/2017 10:44:06 AM
<input type="checkbox"/>	High	System, Grant	Amendment for ROAR-2016-PWW-00001 (1) has been initiated	4/25/2017 10:40:15 AM
<input type="checkbox"/>	High	System, Grant	Application Modifications Required!	4/25/2017 10:35:08 AM
<input type="checkbox"/>	High	System, Grant	Application Modifications Required!	4/25/2017 10:28:07 AM
<input type="checkbox"/>	High	System, Grant	ROAR-2016-PWW-00002 Successfully Submitted!	4/25/2017 10:09:27 AM

CLOSE MY INBOX **MARK CHECKED AS READ** **MARK CHECKED AS ARCHIVED**

2.c. My Tasks

The “My Tasks” section of the homepage will display all documents that require your attention. Typically, unfinished applications or documents that require your attention for the next step in the process will display here. These documents will remain here until you have completed your task and changed the status of the document.

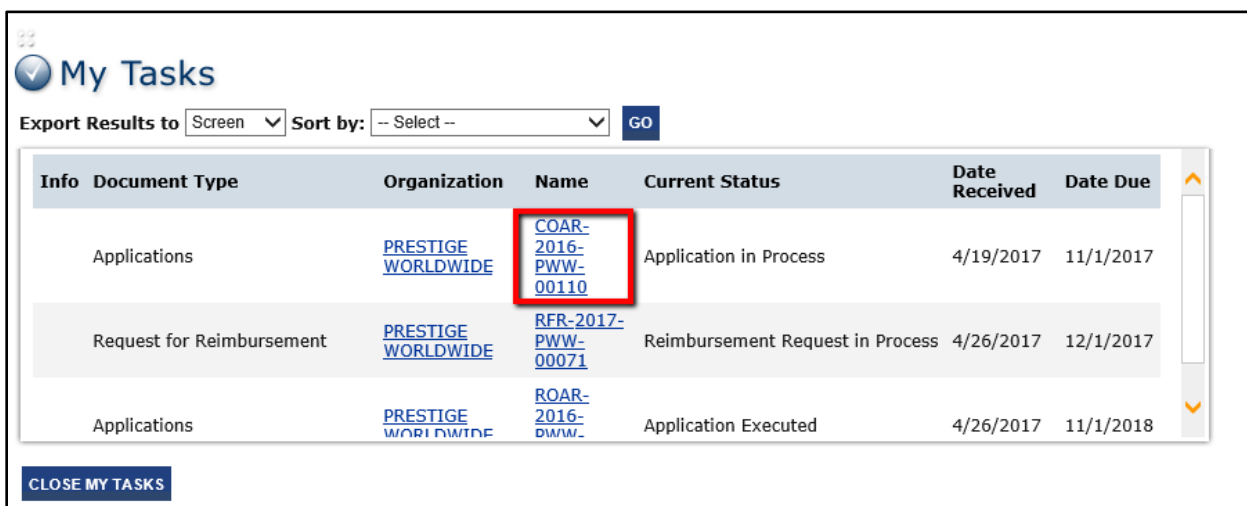


My Tasks

You have **3** new tasks.
 You have **0** tasks that are critical.
 Select the **Open My Tasks** button below to view your active tasks.

OPEN MY TASKS

To navigate to the document menu of a task, click on the name of the target task, as displayed in the picture below.



My Tasks

Export Results to: Screen Sort by: -- Select -- **GO**

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	Applications	PRESTIGE WORLDWIDE	COAR-2016-PWW-00110	Application in Process	4/19/2017	11/1/2017
	Request for Reimbursement	PRESTIGE WORLDWIDE	RFR-2017-PWW-00071	Reimbursement Request in Process	4/26/2017	12/1/2017
	Applications	PRESTIGE WORLDWIDE	ROAR-2016-PWW-	Application Executed	4/26/2017	11/1/2018

CLOSE MY TASKS

3. eGrants Registration and Access Management

3.a. Requesting Access to eGrants

The Airport Sponsor, Program Manager or other Authorized Representative for the organization must first complete and submit an eGrants Organization Registration Request form to ODA. The contact person listed on the form will be assigned as the Program Manager for the organization within the eGrants system and will be the primary point of contact.

Upon approval of the request, the Program Manager will receive an email message from ODA with a username and temporary password for the system. To change the temporary password, log into the system and change your password via your "Profile".



Don't forget to click SAVE when finished!

SAVE SHOW HELP

Back

My Profile

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

Contact Information

Name	Prefix	First	Middle	Last	Suffix
	▼	Brennan *		Huff *	▼

Display Name

Organization *

Title

Address *

City * **State** * **Zipcode** *

County *

Phone #1 * **Phone #2**

Fax **Cell Phone**

Email *

Website

Username *

Password * **Confirm Password** *

• Enter the desired new password
• Confirm the new password

3.b. Adding Members to Your Organization

Once ODA has provided the organization with eGrants access, the Program Manager may now login to eGrants and begin the process of managing their organization. Any adding of additional members to an organization will be coordinated and executed by the initial Program Manager given access to eGrants by ODA. A Program Manager possesses permission to assign other Program Managers, as well as Authorized Representative members to an organization. Please visit the "[Security Role Assignment](#)" section of this manual for detailed information regarding the different grantee security roles.

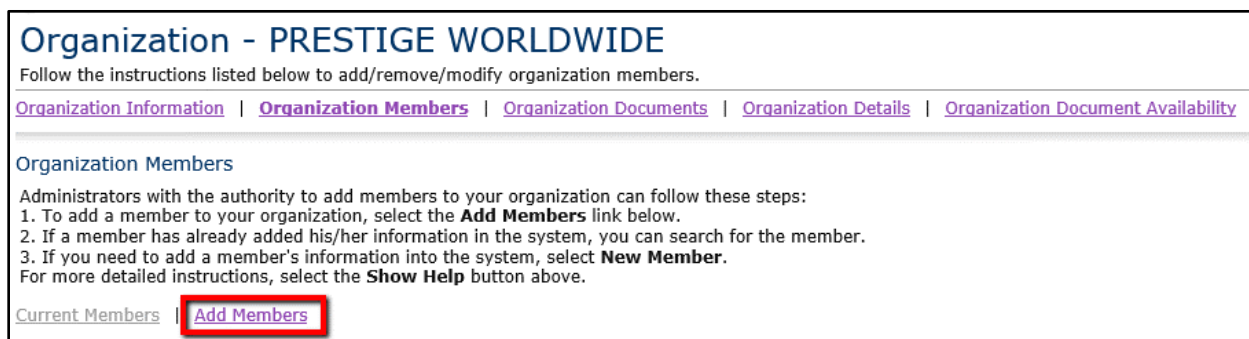
To begin adding members to your organization in eGrants, first navigate to "My Organization(s)", located in the top right corner of the page as pictured below.



Next, click the purple link in the middle of the page that reads "Organization Members"



Once you have clicked the "Organization Members" hyperlink you will be brought to "Organization Members" page, where you will be presented with a summarized view of all the current organization members. From here, to continue with adding a new member to the organization, select the "Add Members" hyperlink located in the middle of the page.



You will then be presented with a "Person Search" textbox where you can perform a search of other users within the system that already exist. If the person you are attempting to add to your organization already possesses eGrants access, you can locate that user via the

search box and affiliate them with your organization. However, if the person you are attempting to add to your organization DOES NOT currently have eGrants access, you will need to add them by clicking the "New Member" button, located to the right of the "Person Search" textbox, as pictured below.

Organization - PRESTIGE WORLDWIDE

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

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

Organization Members

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

1. To add a member to your organization, select the **Add Members** link below.
2. If a member has already added his/her information in the system, you can search for the member.
3. 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

SEARCH

NEW MEMBER

For users that already have eGrants access, use this field to locate and affiliate them with your organization.

For users that do not current have eGrants access, we would click the "New Member" button.

Once the "New Member" button has been clicked, the user will be brought to the "Add/Edit Members" page where they will need to enter the information of the member they intend to add. When selecting "Role", please refer to the "[Security Role Definitions \(Grantee\)](#)" section of this manual. Once all appropriate information has been entered, to complete the new member addition process the Program Manager will select the "Save & Add to Organization" button, located in the top right of the page.

SAVE & ADD TO ORGANIZATION

SHOW HELP

Back

Organization - PRESTIGE WORLDWIDE

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

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

Add/Edit Members

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 *.

Name

Prefix

First

Middle

Last

Suffix

Title

Email

Username

Password

Confirm Password

Date Active

Date Inactive

Role

Once the new member has been added to the organization, the Program Manager will relay this information to the new user.

The fields below are populated with the Organization information by default. However, you may edit the information in any of the fields. This information may also be edited by the person you are creating the profile for from their My Profile page.

Address

City

State

Zipcode

County

Phone #1

Phone #2

Fax

Cell Phone

Website

Information located in the bottom section has been prepopulated using the Organization Information. These fields can be modified if needed.

Once the Program Manager has completed adding the new member to the organization, the Program Manager user will need to communicate the appropriate login information to the newly added member.

3.c. Changing an Organization Member's Security Role

To change the security role of a member belonging to an organization, first navigate to the "My Organization(s)" page.



Next, click the purple hyperlink "Organization Members" located in the middle of the page.



Once you have successfully navigated to the "Organization Members" page, locate the member of the organization which you intend to modify. Once you have located the intended member, select the appropriate role for that member via the "Role" drop-down-list. When you have finished all modifications, click the "Save" button in the top right of the page.

Sort By: -----SELECT-----		-----SELECT-----		Results Per Page 20	GO
<input type="checkbox"/> Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/> Doback, Dale	Authorized Representative	3/15/2017 - 	6	Sysadmin, ODA 3/15/2017	
<input checked="" type="checkbox"/> Doback, Robert	Program Manager	3/15/2017 - 	4	Sysadmin, ODA 3/15/2017	

3.d. Deactivating Members in Your Organization

For varying reasons, there may be need to deactivate one or more members of your organization within eGrants. To do this, first navigate to the "Organization Members" section, as done in the previous sections.

Among the list of current organization members, locate the member which you intend to deactivate. Once you have located the intended member, set an ending date for that member's "Active Dates". To instantly set a member to inactive, set the ending date for that

member to a date in the past. Otherwise, enter a date in the future which the user will become inactive.

Sort By: <input type="text" value="-----SELECT-----"/>		<input type="text" value="-----SELECT-----"/>		Results Per Page	<input type="text" value="20"/>	<input type="button" value="GO"/>
<input type="checkbox"/>	Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/>	Doback, Dale	Authorized Representative <input type="text" value="v"/>	<div>3/15/2017</div> <div>3/14/2017</div>	6	Sysadmin, ODA	3/15/2017

When you have completed adjusting active dates, click the “Save” button in the top right of the page to finalize all the edits.

3.e. Requesting a Password Change

If you forget your password and are unable to access the system, you may request a new password by clicking the [Forgot Password?](#) hyperlink. This will redirect you to the password change page, titled "Forgot Your Password?" Enter in your username and e-mail address, then click the "Reset My Password and Email Me the New One" button. If you have forgotten your account username, click the [Forgot Username?](#) hyperlink, and enter the username associated with your account.

Forgot Your Password?

Please enter the following information to reset your password.

You will be e-mailed a new password if a matching e-mail address is found.

Please enter your username * [Forgot Username?](#)


Please enter your e-mail address *

RESET MY PASSWORD AND E-MAIL ME THE NEW ONE

Note: When requesting a password reset, you must enter the username and email that are associated with your account!

When using "Forgot Username" you must enter the email associated with your account!

This will e-mail you a new password (or forgotten username) that can be used to log into the system. You may then change your password via your "Profile".



OREGON DEPARTMENT OF AVIATION

[My Home](#) | [My Applications](#) | [My Reimbursement Requests](#)

[My Organization\(s\)](#) | [My Profile](#) | [Logout](#)

Don't forget to click SAVE when finished!

SAVE **SHOW HELP**

[Back](#)

My Profile

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

Contact Information

Name	Prefix	First	Middle	Last	Suffix
	▼	Brennan		Huff	▼

Display Name

Organization PRESTIGE WORLDWIDE *

Title Founder

Address 5555555555 *

City Salem * State Oregon * Zipcode 55555 *

County Baker County *

Phone #1 (555) 555-5555 * Phone #2

Fax Cell Phone

Email none@none.com *

Website

Username BHuff *

Password *
 Confirm Password *

• Enter the desired new password

• Confirm the new password

3.f. User & Organization Management

3.f.1 Profile

The "Profile" page can be utilized to keep your user information up to date. To navigate to the "Profile" page, click on the "Profile" hyperlink located in the second navigation bar. Once you click this hyperlink, you will be redirected to the "Profile" page, as indicated below.

My Profile

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

Contact Information

Name	Prefix	First	Middle	Last	Suffix
	▼	Brennan		Huff	▼
Display Name					
Organization	PRESTIGE WORLDWIDE *				
Title	Founder				
Address	5555555555 *				
City	Salem *	State	Oregon ▼ *	Zipcode	55555 *
County	Baker County ▼ *				
Phone #1	(555) 555-5555 *		Phone #2		
Fax			Cell Phone		
Email	none@none.com *				
Website					
Username	BHuff *				
Password			Confirm Password		

Associated Organization Information is summarized at the bottom of the "My Profile" page!

Organization Information

Organization	Role	Active Dates	Assigned By
PRESTIGE WORLDWIDE	Program Manager	03/15/2017 - open ended	Sysadmin, ODA

It is important that the information on your "Profile" page is accurate. As you will read in various sections of this manual, various eGrants features operate based off this information. Failing to keep this information accurate may result in important communications being missed.

Particular application forms have also been configured to utilize the information on your "Profile" page. If you encounter a scenario in which pre-populated data on a form is inaccurate, please be sure to check the "Profile" page and verify all of the information listed is up-to-date.

3.f.2 My Organization(s)

The "My Organization(s)" page can be utilized to keep your organizations' information up to date. To navigate to the "My Organization(s)" page, click on the "My Organization(s)" hyperlink located in the second navigation bar.

If you are a member of two or more organizations, you will be redirected to the "My Organization(s)" page with a table of available organizations. Click on the name of the organization that you would like to modify. This will redirect you to the "Organization Information" page for that organization. If you are a member of only one organization, you will be redirected to the "Organization Information" page for that organization.

You can modify your organization's contact information by entering data into the fields, then click the **SAVE** button.

Organization - PRESTIGE WORLDWIDE

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

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

Organization Information

Name

PRESTIGE WORLDWIDE *

Airport Identifier

PWW *

Parent Company Legal Name

Kelloggs

Contact Person

Paul

Contact Title

Guy

Address

5555555555 *

City

Salem *

State

Oregon

Zipcode

55555 *

County

Baker County *

Phone

(555) 555-5555 *

Fax

Email

Please refer to the [eGrants Registration and Access Management](#) section of this manual for more details regarding how to manually add a user to an organization through the **"Organization Members"** menu.

The **"Organization Documents"** section will display a list of documents that are associated with a given organization. Upon navigating to the **"Organization Details"** section, you will notice that there are fields which you are unable to complete. These fields are to be entered by internal Oregon Department of Aviation staff.

ORGANIZATION REGIONS

This page to be completed by ODA staff!

Region:

Region 1

Region 2

Region 3

Region 4

Region 5

N/A

ACT-Region:

Central Oregon ACT

NPIAS?

Non-NPIAS

4. Security Role Assignment

The user should now have an account which is activated and affiliated with an organization. Please refer to Section 3 [eGrants Registration and Access Management](#) if this is not the case.

4.a. User Security Role Assignment

Now that an organization has been created, and a Program Manager assigned to said organization, additional members can now be added by the Program Manager. This can be accomplished by following these steps:



- 1) After logging in as a Program Manager, click the "My Organization(s)" link.
- 2) Click the link for "Organization Members"
- 3) Locate the member who's security role you intend to modify
- 4) Select the appropriate "Role" in the drop down list
- 5) Check the box next to the user you who's role you intend to modify
- 6) Finally, click the "Save" button.



<input checked="" type="checkbox"/>	Doback, Robert	Consultant	3/15/2017	-	4	Sysadmin, ODA 3/15/2017
-------------------------------------	--------------------------------	------------	-----------	---	---	-------------------------------

NOTE: Program Managers can only set the following role assignments:

- **Program Managers**
- **Authorized Representatives**
- **Consultants**
- **Grantee Finance users**
- **Grantee Viewer users**

4.b. ODA Staff Security Role Assignment

The following ODA internal security roles have been identified and created for use in the eGrants system, all of which have different levels of permission and access within eGrants:

- **System Administrator**
- **Director**
- **Program Coordinator**
- **Board Member**
- **ACT Coordinator**
- **ACT Aviation Representative**
- **ODA Finance**
- **ODA Viewer**

4.c. Security Role Definitions (ODA)

4.c.1 System Administrator (sysadmin)

The System Administrator is granted the highest level of permissions within the eGrants system.

4.c.2 Director (DIR)

Director of ODA.

4.c.3 Program Coordinator (PC)

Program coordinator(s) responsible for administering ODA's grant programs, and also the primary point of contact.

4.c.4 Board Member (BM)

State Aviation Board member.

4.c.5 ACT Coordinator (ACTC)

Oregon Department of Transportation Area Commissions on Transportation Liaison.

4.c.6 ACT Aviation Representative (ACTAR)

Area Commissions on Transportation member responsible for being the liaison between their corresponding ACT and the Aviation Review Committee (ARC).

4.c.7 ODA Finance (ODAF)

ODA Finance Department.

4.c.8 ODA Viewer (ODAV)

ODA Viewer is restricted to only view permissions within the eGrants system.

4.d. Security Role Definitions (Grantee)

The following grantee security roles have been identified and created for use in the eGrants system, all of which have different levels of permission and access within eGrants:

- **Program Manager**
- **Authorized Representative**
- **Consultant**
- **Grantee Finance**
- **Grantee Viewer**

4.d.1 Program Manager (PM)

The Program Manager role is granted the highest level of permissions within the organization. The PM is responsible for managing their organization in eGrants and possesses permission to add and remove member users, assign security permissions within their organization, and update the organization's information. The PM has the ability to initiate and submit grant applications, execute grant agreements/amendments, initiate and submit requests for reimbursements. Examples of individuals in this role may include the airport sponsor or owner, or other authority figure within the organization.

4.d.2 Authorized Representative (AR)

The Authorized Representative role is granted the second highest level of permissions within the organization. The AR has the ability to initiate and submit grant applications, execute grant agreements/amendments, initiate and submit requests for reimbursements. Examples of individuals in this role may include the airport manager, director, or other authority figure within the organization.

4.d.3 Consultant (CON)

The consultant role has limited functionality within the system that allows the user to work on a grant application that has been initiated by the PM or AR. The system will not allow the application to be submitted to ODA; the PM or AR will need to review the application and submit to ODA. The eGrants system will only allow grant applications to be submitted by either the PM or the AR. Consultants may belong to more than one organization. Examples of individuals in this role may include project consultants or other parties assisting the organization with completing grant applications.

4.d.4 Grantee Finance (GF)

The Grantee Finance role may initiate requests for reimbursements, but does not have permission to submit the request; the PM or AR will need to review the reimbursement request and submit to ODA. The eGrants system will only allow reimbursement requests to be submitted by the PM or AR.

4.d.5 Grantee Viewer (GV)

The Grantee Viewer role is restricted to only view permissions within the eGrants system.

4.e. eGrants Security Matrix (GRANTEE)

	Role Being Assigned					
Assignor Role		<u>PM</u>	<u>AR</u>	<u>CON</u>	<u>GF</u>	<u>GV</u>
	<u>PM</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
	<u>AR</u>					
	<u>CON</u>					
	<u>GF</u>					
	<u>GV</u>					

5. Document Navigation

5.a. Document Navigation Menu

In this section, we will discuss how to navigate throughout documents within eGrants. There are five main areas of the document menu which we will discuss in detail:

- 1) Menu
- 2) Forms Menu
- 3) Status Changes
- 4) Management Tools
- 5) Related Documents and Messages

OREGON DEPARTMENT OF AVIATION

My Home | My Applications | My Reimbursement Requests | My Organization(s) | My Profile | Logout | SHOW HELP

Menu | Forms Menu | Status Changes | Management Tools | Related Documents and Messages

[Back](#)

COAR Application Menu - Forms

Please complete all required forms below.

Document Information: [COAR-2016-PWW-00110](#)

[Details](#)

Forms

Status	Page Name	Note	Created By	Last Modified By
Application Forms				
	General Project Information		Brennan Huff	4/19/2017 4:05:18 PM
	Project Documentation		Brennan Huff	4/19/2017 4:05:42 PM
	Statewide Impact		Brennan Huff	4/19/2017 4:05:55 PM
	Budget		Brennan Huff	4/19/2017 4:06:30 PM
	Miscellaneous Uploads			
PDF Documents				
	Application Instructions			
	Application Checklist			
	ACT Review Instructions			
	Sample Draft Agreement			

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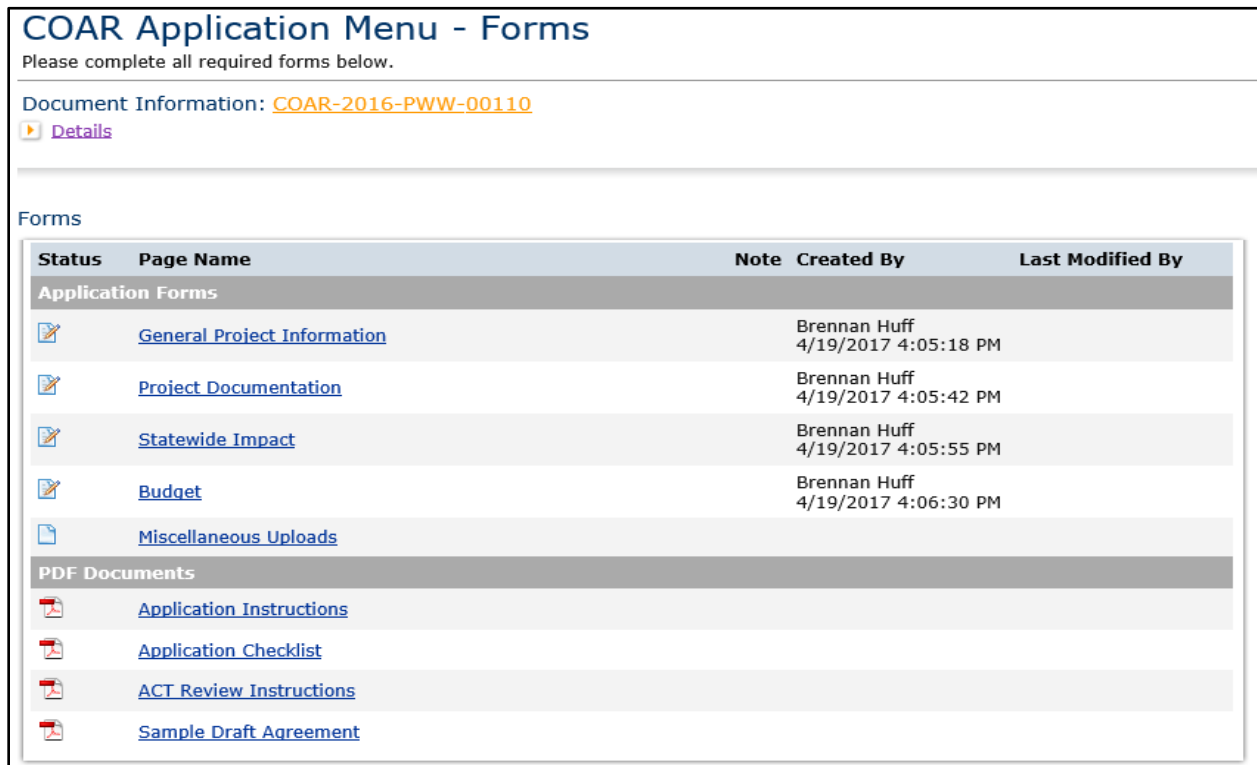
NOTE: Whenever you are within a document, towards the top of the page will be the “Document Identifier”. Clicking the “Document Identifier” hyperlink at the top of the page or within your “My Tasks” section will return you to the document forms menu at any point! Please reference the screenshot below for the location of the “Document Identifier”.



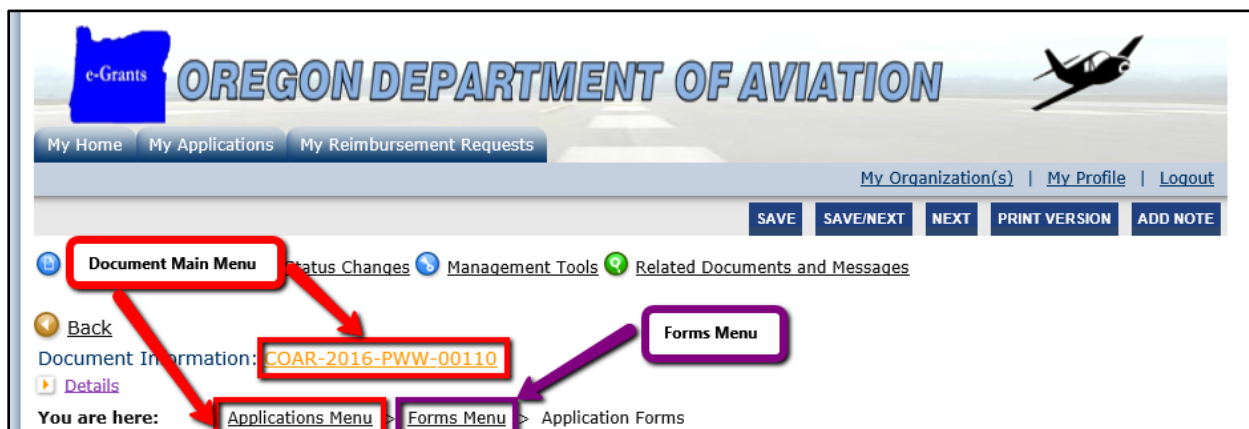
5.b. Forms Menu

In this section of the document, accessible by clicking the “Forms Menu” link you will find the document “Forms” menu. You may also hover of the Forms Menu hyperlink with your mouse cursor to navigate using the menu pop-up. Within the “Forms” menu will be the relevant forms you will need to complete to submit the document you are working on.

The screenshot below is an example of an Application’s “Forms menu”.



Located towards the top of all forms will be a "You are here:" line with links available that will take you back to the document main menu, and the "Forms" menu, respectively.



5.b.1 Repeatable Rows

In certain circumstances, forms will have fields that are repeatable. This means that once you have filled in the field and clicked the "Save" button, another field for that information will appear underneath the first field. You may also see this functionality arise in a table, where entering information into a row of a table will then cause the table to display a new row after save.

To fully utilize a repeatable row, enter data into the fields available and then click the "Save" button. This will display a new field/row underneath the ones with entered data, as displayed in the image representation below.

Source of Match Funds *	Amount	Date Available
FAA grant funds	\$8,000.00	04/08/2017
Source of Match Funds (1)	\$2,000.00	04/08/2017
Total Match Funds:	\$10,000.00	10 %

NOTE: On some forms, you will presented with an pre-determined available number of rows, which may repeat with another set of available rows once the page is saved. This functions the same as regular repeatable fields, with the exception that it has been configured to repeat more than one row at a time for convenience.

5.b.2 Form Dependencies

Some forms may utilize what is known as dependency functionality. This means that other sections of the form will appear and become required based on selections you have previously made. In the example pictured below, we are presented with a question which happens to be a dependency question. This means that the answer we provide here will

determine which sections of this form we will need to complete.

STATEWIDE IMPACT

Instructions:

- Please read the [Aviation Project Funding Request Instructions](#) prior to completing this application.
- Required fields are marked with a red asterisk (*)

Statewide Impact of Project

Per ORS 367.084(3), the following questions apply:

- Does the proposed project reduce transportation costs for Oregon businesses or improve access to jobs and sources of labor? If yes, provide a short explanation. *
- Does the proposed project result in an economic benefit to the state? If yes, provide a short explanation. *
- Is the proposed project a critical link connecting elements of Oregon's transportation system that will measurably improve utilization and efficiency of the system? If yes, provide a short explanation. *
- Is the proposed project ready for construction or implementation? *
- Does the project have any unique construction-readiness, project implementation issues, or possible delays? *
- Does the proposed project have a useful life expectancy that offers maximum benefit to the state? If yes, provide a short explanation. *

☐ Yes ☐ No

☐ Yes ☐ No

☐ Yes ☐ No

☐ Yes ☐ No

☐ Yes ☐ No

☐ Yes ☐ No

Upon answering "Yes" additional fields will appear on the page and have become required. If "No" was selected, the page would allow us to continue without answering those questions.

STATEWIDE IMPACT

Instructions:

- Please read the [Aviation Project Funding Request Instructions](#) prior to completing this application.
- Required fields are marked with a red asterisk (*)

Statewide Impact of Project

Per ORS 367.084(3), the following questions apply:

- Does the proposed project reduce transportation costs for Oregon businesses or improve access to jobs and sources of labor? If yes, provide a short explanation. *

☒ Yes ☐ No

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- Does the proposed project result in an economic benefit to the state? If yes, provide a short explanation. *

☐ Yes ☐ No

Some form dependencies will present entirely new sections, while others will simply flag another field already displayed on the page as required. An example of the latter would be select "Other" as an answer to a question and then being required to describe what "Other" is in another available field.

These dependencies have been implemented in such a way that the user is not required to know that a field is a dependency question. It is only important to note that answers to particular fields that ARE dependencies may require that you complete additional fields.

5.b.3 Form Field-Level Permissions

Various forms configured within e-Grants may use what is referred to as field-level-permissions. This means that certain fields on forms have been defined to only allow designated security roles the permission to edit. In some cases, this may be based on system security role, process status, or both. Fields that are controlled with field-level permissions will appear greyed out to security roles that do not have permissions to edit.

The screenshot below is an example of fields that has been configured with field-level-permissions.

ORGANIZATION REGIONS

This page to be completed by ODA staff!

Region:

Region 1
Region 2
Region 3
Region 4
Region 5
N/A

ACT-Region:

Central Oregon ACT ▼

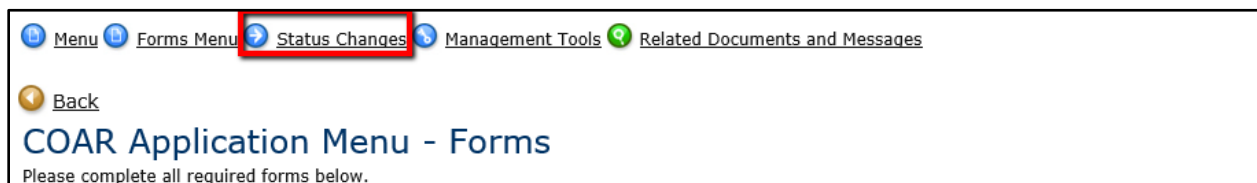
NPIAS?

Non-NPIAS ▼

5.c. Status Changes

Once you have completed all of the forms available, you can submit and/or change the status of the document. By doing so, you will inform the next user in the process that you are complete with your task. From the document menu, click on or hover over the "Status Changes" link to navigate to the "Status Options" page.

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



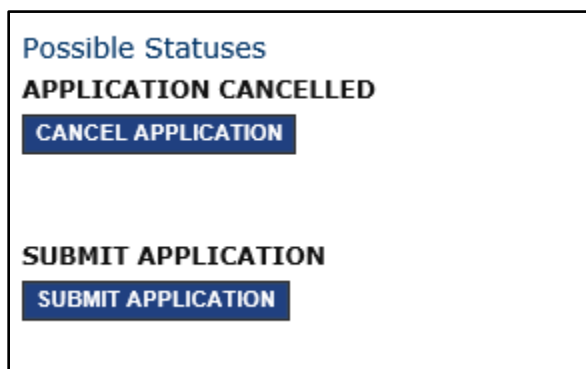
Menu Forms Menu **Status Changes** Management Tools Related Documents and Messages

Back

COAR Application Menu - Forms

Please complete all required forms below.

Here, you will find the available status change options. In our example screenshot we can choose to either submit the application for review or we can cancel the document.



Possible Statuses

APPLICATION CANCELLED

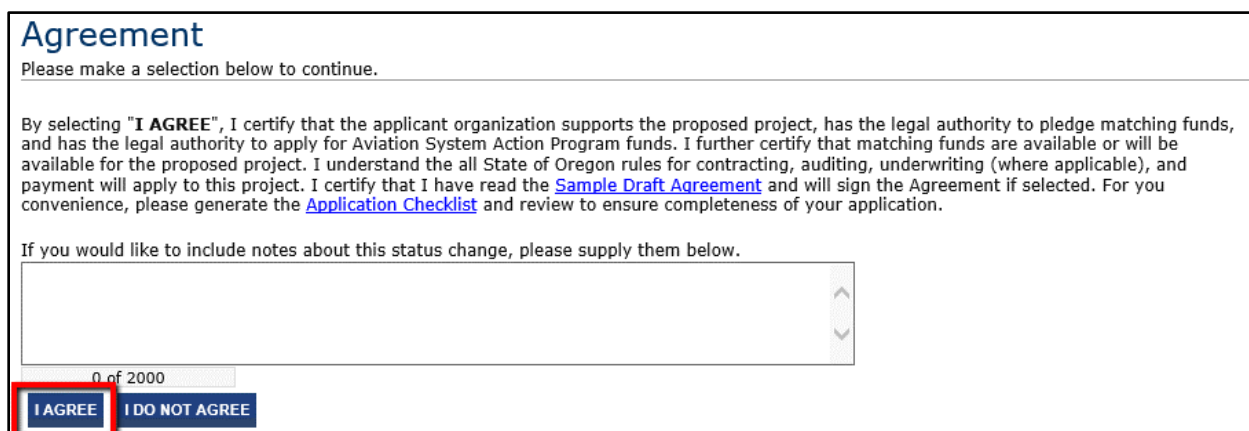
CANCEL APPLICATION

SUBMIT APPLICATION

SUBMIT APPLICATION

NOTE: If you believe there is a missing status option, most likely this is a result of security role mismatch. Who can change the status at a particular point is determined by the user's security role.

On certain status change selections, you will be presented with agreement language. The user is required to select "I Agree" to proceed with the status change, and is given the option to leave any notes on the document related to that status change. You may click on the hyperlinks within the agreement language to view sample documents.



Agreement

Please make a selection below to continue.

By selecting "**I AGREE**", I certify that the applicant organization supports the proposed project, has the legal authority to pledge matching funds, and has the legal authority to apply for Aviation System Action Program funds. I further certify that matching funds are available or will be available for the proposed project. I understand the all State of Oregon rules for contracting, auditing, underwriting (where applicable), and payment will apply to this project. I certify that I have read the [Sample Draft Agreement](#) and will sign the Agreement if selected. For your convenience, please generate the [Application Checklist](#) and review to ensure completeness of your application.

If you would like to include notes about this status change, please supply them below.

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I AGREE **I DO NOT AGREE**


5.d. Management Tools


The “Management Tools” page will list additional tools that are available to the user. These tools have different functions and are used to either view additional data specific to the document, or to complete additional tasks.


To navigate to the “Management Tools” page, click the “Management Tools” link that is located on document menu. This will redirect you to the “Management Tools” page.


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.

 **STATUS HISTORY**
Select the link above to view the status history of this document.

 **CHECK FOR ERRORS**
Select the link above to check the entire document for errors.

 **VIEW MODIFICATION HISTORY**
Select the link above to view various modifications that people have made to specific pages in the document.

The add/edit people “Management Tools” is particularly useful, as it will control who has access to the document, what document-level security role they are given, and the dates which they are permitted access on the document. Listed below are some common uses of the “Management Tools” available on this page.

- **Create Full Print Version** – Creates a full copy of the document in a printable .pdf
- **Create Full Blank Print Version** – Creates a full-blank copy of the document in .pdf
- **Add/Edit People** – Controls document security-level, user access.
- **Status History** – Detailed view of previous status history of the document
- **Check for Errors** – Used to determine if any document errors exist on any forms.
- **View Modification History** – Detail of who has modified document, and when.

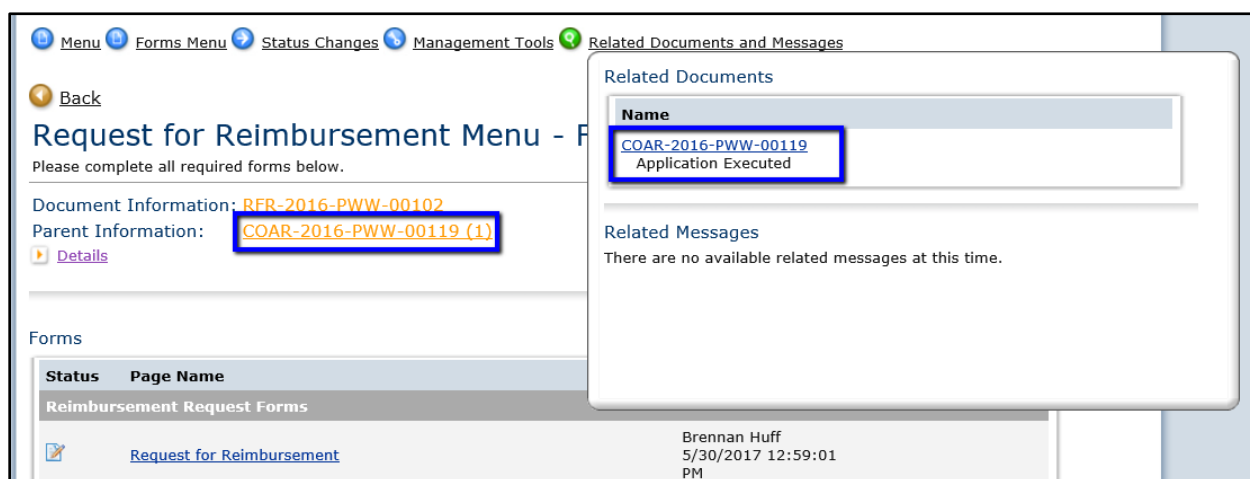
5.e. Reimbursement Requests, Messages and Related Documents

The “Related Documents and Messages” menu is of great importance. In this section, from an executed application, you will be able to “Initiate a Request for Reimbursement”. You would also come to this location to view any system messages related to the document or any other documents that have an existing relationship to that document.



In the above screenshot, we have an application that has reached the appropriate status to initiate Request for Reimbursement (RFR) documents.

You may click the “Related Documents and Messages” menu from within an RFR to view the parent application document (boxed in blue).



5.f. Document Navigation Summary

5.f.1 Forms Menu

The "Forms" menu will allow for you to view a list of navigational links that lead to PDF documents, and forms that are within this application. It will also provide additional information, such as an icon that displays a visual representation of the forms status. PDF documents either display an Adobe Acrobat Reader symbol, or an Internet Explorer symbol. The "Forms" menu will display the name of the PDF/form, an icon if notes exists on the page, the name of the user whom created the page and when, and the name of the last user to modify the page and the date when it was last modified.

5.f.2 Status Changes

Once you have completed all the forms available, you can submit and/or change the status of the document. By doing so, you will inform the next user in the process that you are complete with your task. From the document menu, click on the "Status Changes" button to navigate to the "Status Options" page.

5.f.3 Management Tools

The "Management Tools" page will list additional tools that are available to the user. These tools have different functions and are used to either view additional data specific to the document, or to complete additional tasks. To navigate to the "Management Tools" page, click the "Management Tools" button that is located on document menu.

5.f.4 Related Documents and Messages

The "Related Documents and Messages" menu is of great importance. In this section, you will be able to "Initiate a Request for Reimbursement" and view related system messages.

6. Notes

eGrants allows for various documents to have notes attached to them. These notes may be used to communicate to other organization staff members or to ODA staff who are assigned to the document.

6.a. Adding and Editing Notes

First you will navigate to the form where you intend to place your note.

The screenshot shows the top navigation bar of the Oregon Department of Aviation eGrants system. It includes links for 'My Home', 'My Applications', and 'My Reimbursement Requests'. On the right, there are links for 'My Organization(s)', 'My Profile', and 'Logout'. Below these links are buttons for 'SAVE', 'SAVE/NEXT', 'NEXT', 'PRINT VERSION', and 'ADD NOTE'. The 'ADD NOTE' button is highlighted with a red box. At the bottom, there is a 'Menu' section with links for 'Forms Menu', 'Status Changes', 'Management Tools', and 'Related Documents and Messages'.

- 1) Click the "Add Note" button on the form you wish to place your notation on, as depicted in the above screenshot.



The screenshot shows the 'Notes' form. It has a title 'Notes' and a subtitle 'There are no available notes at this time.' Below this is a table with columns 'Message', 'Date', and 'Action'. At the bottom, there are two buttons: 'ADD A NEW NOTE' (highlighted with a red box) and 'CLOSE NOTES'.

- 2) Next, you will click the "Add a New Note" button.



The screenshot shows the 'Add New Note' form. It has a title 'Add New Note' and a subtitle 'Drag Here'. Below this is a form with a 'Subject' field containing 'Modifications Required' and a 'Message' field containing 'Please provide additional information for field "Project Summary"'. Below the message field is a section for assigning access to the note. It says: 'The following people can be assigned access to view or not view your note. Check the box next to the name of the viewer to give them the ability to view the note. Uncheck the box if the note should not be seen by that viewer. Checking the All/None box will either check or uncheck all of the viewers.' Below this text are two checkboxes: 'All/None' (checked) and 'Dale Doback' (unchecked). The 'All/None' checkbox is highlighted with a red box. At the bottom, there are three buttons: 'SAVE' (highlighted with a red box), 'CANCEL', and 'CLOSE NOTES'.

- 3) As depicted in the above screenshot:
 - a. Highlighted in yellow are the subject and body of the notation.
 - b. You can be selective as to who has access to view the note you create:
 - i. Check the box next to the people who CAN view the note.
 - ii. Leave unchecked the people who should NOT be able to view.
 - c. Lastly, click the "Save" button to finish adding your notation.

Once you have successfully added your note, it will be displayed in two locations. First, it will now display on the "Forms" menu that a particular form has viewable notes, as pictured below.

Forms				
Status	Page Name	Note	Created By	Last Modified By
Application Forms				
	General Project Information		Brennan Huff 5/15/2017 2:30:08 PM	Brennan Huff 5/15/2017 2:30:57 PM

Secondly, the note will be displayed in the actual form itself.


OREGON DEPARTMENT OF AVIATION


[My Home](#)
[My Applications](#)
[My Reimbursement Requests](#)

[My Organization\(s\)](#) | [My Profile](#) | [Logout](#)

[SAVE](#)
[SAVE/NEXT](#)
[NEXT](#)
[PRINT VERSION](#)
[SHOW NOTES \(1\)](#)

[Menu](#)
[Forms Menu](#)
[Status Changes](#)
[Management Tools](#)
[Related Documents and Messages](#)


[Back](#)

Document Information: [COAR-2016-PWW-00114](#)

[Details](#)

You are here: > [Applications Menu](#) > [Forms Menu](#) > Application Forms

Recipients of your notes will be able to view the date which the note was created, the author of the note, and also have the ability to reply to the note itself.


Notes
Drag Here

Message	Date	Action
Modifications Required Please provide additional detail for your description of Project Summary. Submitted: 5/15/2017 4:15:30 PM Author: Brennan Huff	5/15/2017	Reply

[ADD A NEW NOTE](#)
[CLOSE NOTES](#)

Just as the recipient of a note can reply, the author of a note can edit the note(s) they leave. To edit a note you have previously saved, simply view the note, and click the "Edit" button.

Drag Here

Reply to Note

Message	Date	Action
Modifications Required	5/15/2017	Reply
RE: Modifications Required	5/15/2017	Edit

ADD A NEW NOTE

CLOSE NOTES

In the above screenshot, we can either reply to a note left by another user, or we can edit the reply we gave.

The same steps for creating a note apply to editing a note. Once "Edit" has been clicked, the note will open with the current subject and body. Once you have finished making the adjustments, click the "Save" button. Please note, the system does NOT generate system messages or send external emails to notify users when notes have been placed on a form.

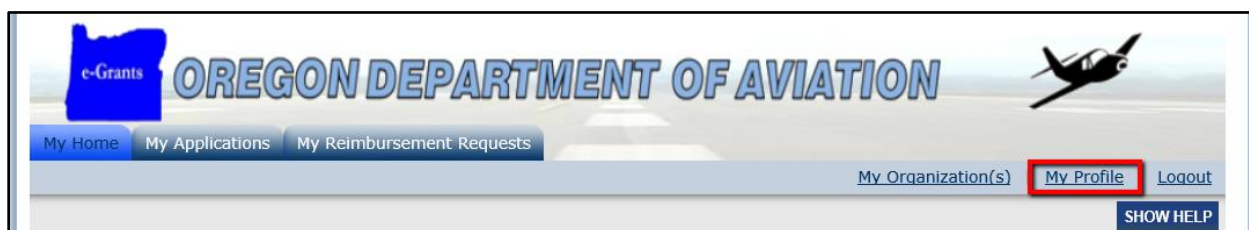
7. Automatic E-Mail Notifications

7.a. Automatic E-Mail Notifications

Automatic e-mail notifications may be sent to you periodically throughout the grant year. These messages will be sent via the system per an automatic process or as the result of a user triggered event. These messages might accompany the creation of a document, the submission of a document, 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 ODA personnel.

To receive these messages, it is important that you include an active, frequently used e-mail address when creating your contact record in the system. If you provide an incorrect e-mail address or an address to an account that is either inactive or full, you will not be able to receive these important messages. A copy of these messages will be sent to the recipient's inbox in eGrants and to the recipient's external email address.

Keeping your profile information accurate is key to not missing important communications. To update your profile information, click "Profile" in the menu selections at the top of the page.



My Profile

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

Contact Information

Name	Prefix	First	Middle	Last	Suffix
	▼	Dale		Doback	▼
Display Name					
Organization	PRESTIGE WORLDWIDE *				
Title	Founder				
Address	5555555555 *				
City	Salem *	State	Oregon ▼ *	Zipcode	55555 *
County	Baker County ▼ *				
Phone #1	(555) 555-5555 *		Phone #2		
Fax			Cell Phone		
Email	none@none.com *				
Website					
Username	DDoback *				
Password			Confirm Password		

In order to receive important communications from ODA staff and system notifications, it is important that the E-mail address associated with your eGrants account be kept up-to-date with an E-mail you check regularly!

8. Additional Assistance

All members of grantee organizations are encouraged to contact a Program Manager within your agency for additional assistance before contacting their ODA contact(s) or the Help Desk.

8.a. Contacting ODA

For questions regarding eGrants or for additional assistance please contact us by e-mail at asap@aviation.state.or.us or by phone at 503-378-4880.

8.b. Contacting the Help Desk

Live help desk support (8:00 am - 5:00 pm Pacific, Mon. – Fri.). Agate's call center is housed and staffed at Agate's Okemos, MI headquarters and at the Glendale Arizona Location.

- The helpdesk can be reached toll free at 866-449-1425
- or by email at <mailto:azhelpdesk@agatesoftware.com>.

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