



# **Federal Program Office (FPO)**

## **User Manual**

### **System Navigation**

NOAA Grants Online Program Management Office

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Version 4.17



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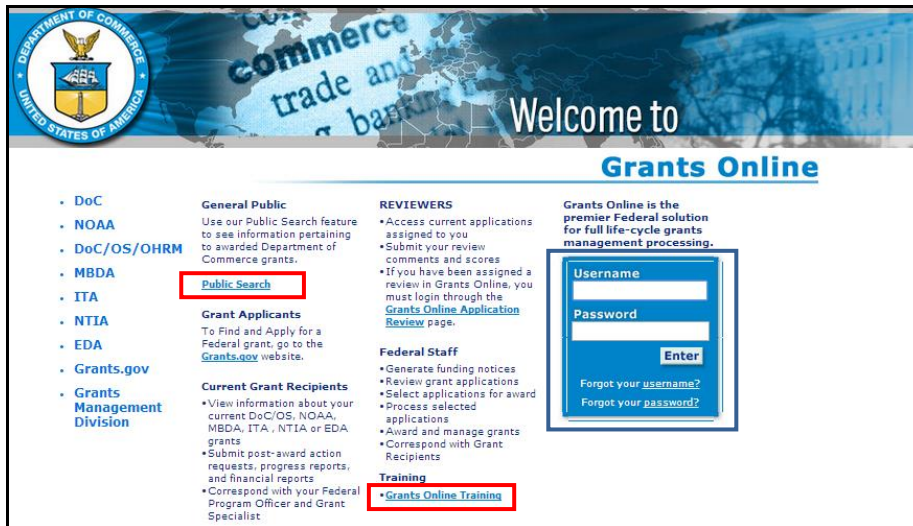
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## Overview

This document provides step-by-step instructions that facilitate the Federal Program Office's (FPO) navigation of the Grants Online system.

## Accessing Grants Online

1. Type <https://grantsonline.rdc.noaa.gov> in the address bar of your browser to launch the Grants Online home page.
2. Before logging into Grants Online, the user can access the public search feature, the Grants Online training page, and other useful links from this screen.



### WARNING!



If the user enters his/her username or password incorrectly, s/he will see a red error message on the screen. After three unsuccessful attempts to log in, the system locks the user out of his/her account. The user must click the **“Forgot your password?”** link and provide the correct responses to his/her security questions. If the issue is **“Forgot your username?”** click that link to obtain the Help Desk phone number.

### Grants Online Navigation Features

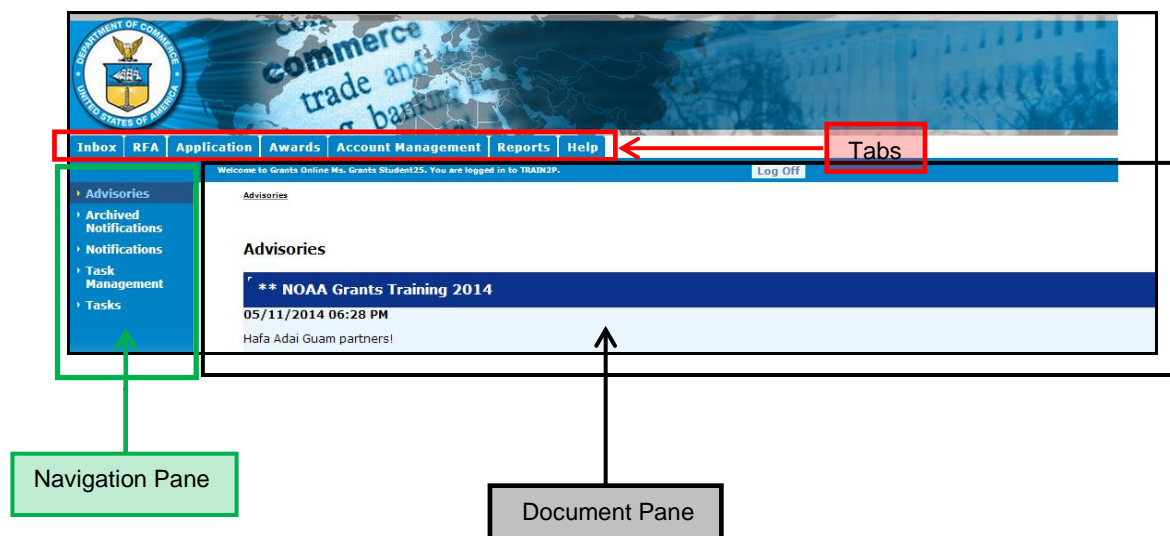
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Access to most Grants Online features is determined by the user's role. Each registered user is given a role and level of access sufficient to accomplish his/her assigned tasks.

#### Screen Layout

When the user has successfully signed into Grants Online, the system will default to the Inbox Tab. Grants Online is divided into several content areas:

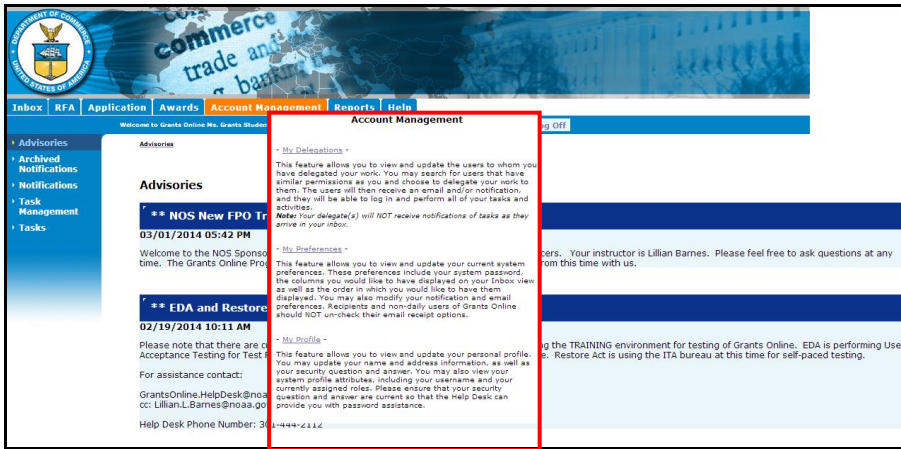
- **Tabs:** Highlighted by a red border at the top of the screen. Use the tabs to navigate to the different areas of Grants Online.
- **Navigation Pane:** Highlighted by a green border on the left-hand side of the screen. The options displayed in the navigation pane are determined by the active tab. Click on the desired link to go to that content area of Grants Online.
- **Document Pane:** Highlighted by a black border located in the middle of the screen. This is where most of the Grants Online details and information are displayed.



## User Interface Features

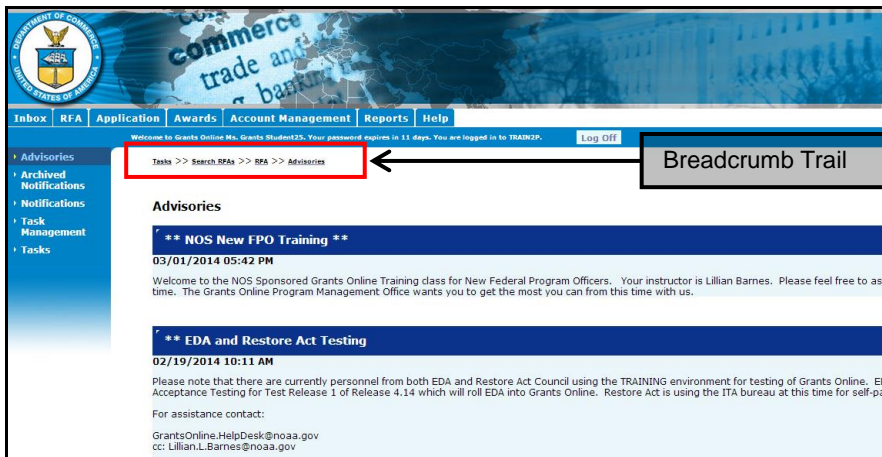
### Pop-Up Short Cuts

When the user places the cursor over a tab at the top of the screen, s/he will see a pop-up menu that contains the same links as the left navigation pane for that tab. This allows the user to navigate directly to a content area without first having to click the tab.



### Breadcrumbs

The Grants Online system keeps track of the pages the user has visited since s/he last signed on. The software puts a “breadcrumb trail” of those pages at the top of the document pane. This feature should be used instead of the browser’s “Back” button.



### WARNING!

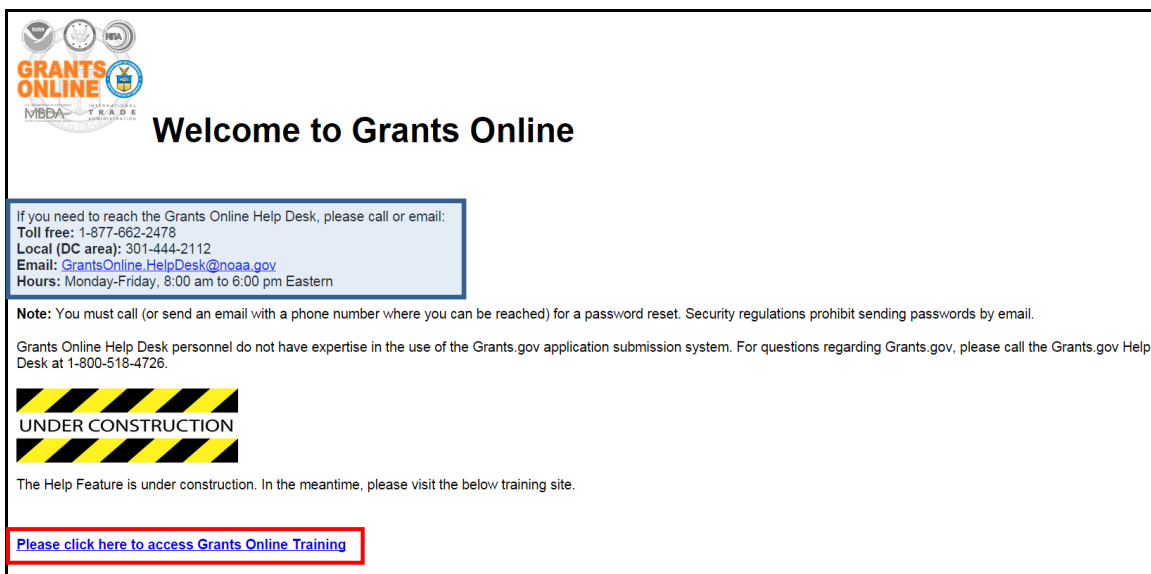



Please **DO NOT** use the browser’s “Back” button in Grants Online. Using the browser’s “Back” button may sign you out of Grants Online.

### Help Tab

---

When the user clicks the Help Tab, the following screen will display. The Help Desk contact information and hours of availability are displayed in the blue shaded box. To access the Grants Online training, click the **Please click here to access Grants Online Training** link at the bottom of the screen.



 **GRANTS ONLINE**

## Welcome to Grants Online

If you need to reach the Grants Online Help Desk, please call or email:  
Toll free: 1-877-662-2478  
Local (DC area): 301-444-2112  
Email: [GrantsOnline.HelpDesk@noaa.gov](mailto:GrantsOnline.HelpDesk@noaa.gov)  
Hours: Monday-Friday, 8:00 am to 6:00 pm Eastern

Note: You must call (or send an email with a phone number where you can be reached) for a password reset. Security regulations prohibit sending passwords by email.

Grants Online Help Desk personnel do not have expertise in the use of the Grants.gov application submission system. For questions regarding Grants.gov, please call the Grants.gov Help Desk at 1-800-518-4726.

**UNDER CONSTRUCTION**

The Help Feature is under construction. In the meantime, please visit the below training site.

[Please click here to access Grants Online Training](#)



## Inbox Tab

### Tasks

Email notifications alert the user to an action or task s/he must complete. When the user selects a task, s/he has the opportunity to complete the action that has been assigned to him/her within the workflow.

### Access a Task

1. From the Inbox Tab, click the **Tasks** link. A list of the user’s available tasks is displayed.

Advisories >> Tasks

**Your Tasks**

Document Type:  Status:  [Apply Filter >>](#)

17 items found, displaying all items.1

View	Award Number	RFA Name	Task Received Date	Applicant Name	Task Id	Task Name	Task Status	Document Type	Document Id	Start Date
<a href="#">View</a>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571210	Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitment of Funds	2259324	
<a href="#">View</a>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571209	Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitment of Funds	2259323	
<a href="#">View</a>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571077	Procurement Request and Commitment of Funds	In Progress	Procurement Request and Commitment of Funds	2259284	08/06/



**NOTE:** To customize the look and feel of Grants Online, use the Account Management Tab. Details associated with the Account Management Tab are covered later in this document.

## View a Task

1. Click the **View** link next to the task you wish to view.

The screenshot shows the 'Your Tasks' interface. At the top, there are filters for 'Document Type' (set to 'All') and 'Status' (set to 'Open'), with an 'Apply Filter >>' button. Below the filters, it says '17 items found, displaying all items.1'. The main table has columns: Award Number, RFA Name, Task Received Date, Applicant Name, Task Id, Task Name, Task Status, Document Type, Document Id, and Start Date. The first row is highlighted, and its 'View' link is enclosed in a red box.

View	Award Number	RFA Name	Task Received Date	Applicant Name	Task Id	Task Name	Task Status	Document Type	Document Id	Start Date
<a href="#">View</a>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571210	Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitment of Funds	2259324	
<a href="#">View</a>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571209	Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitment of Funds	2259323	
<a href="#">View</a>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571077	Procurement Request and Commitment of Funds	In Progress	Procurement Request and Commitment of Funds	2259284	08/06/2014
<a href="#">View</a>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571076	Review Release of Funds	Not Started	Award File	2259283	

## Filter a Task

1. Select the Document Type from the dropdown list.
2. Specify the Status from the dropdown list.
3. Click the **Apply Filter** button.

The screenshot shows the filter section of the 'Your Tasks' interface. The 'Document Type' dropdown is set to 'RFA' and the 'Status' dropdown is set to 'Open'. The 'Apply Filter >>' button is highlighted with a red box.

4. The **Your Tasks** screen shows only the filtered tasks. In this example, only the Open (In Progress) RFAs are visible.

The screenshot shows the 'Your Tasks' interface after filtering. The 'Document Type' dropdown is set to 'RFA' and the 'Status' dropdown is set to 'Open'. The 'Apply Filter >>' button is visible. Below the filters, it says '4 items found, displaying all items.1'. The main table shows only tasks with a status of 'In Progress'.

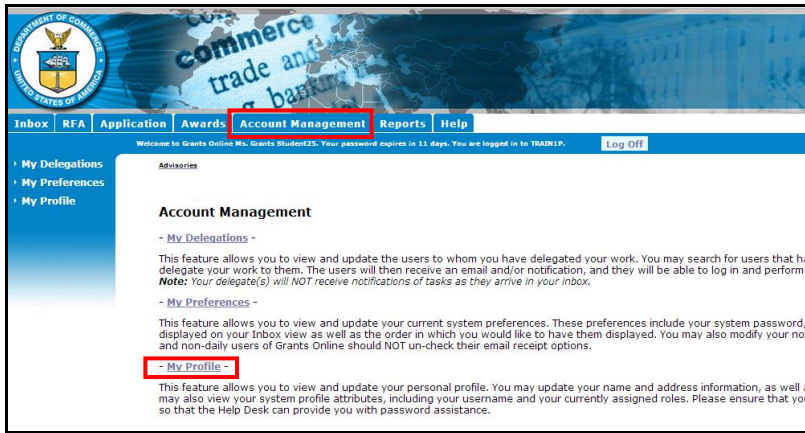
View	RFA Id	RFA Name	RFA Type	Task Id	Task Name	Task Status	Document Type	EFO Id	Document Id
<a href="#">View</a>	2259009	Student25_080414_Universal	N	2569643	Notify Recipients	In Progress	RFA		2259009
<a href="#">View</a>	2256808	test 0508	N	2564265	Notify Recipients	In Progress	RFA		2256808
<a href="#">View</a>	2256757	Universal RFA 042914	N	2556044	Notify Recipients	In Progress	RFA		2256757
<a href="#">View</a>	2256176	Great Day For FPO Training (GDFFT)	N	2553586	Notify Recipients	In Progress	RFA		2256176

## Account Management Tab

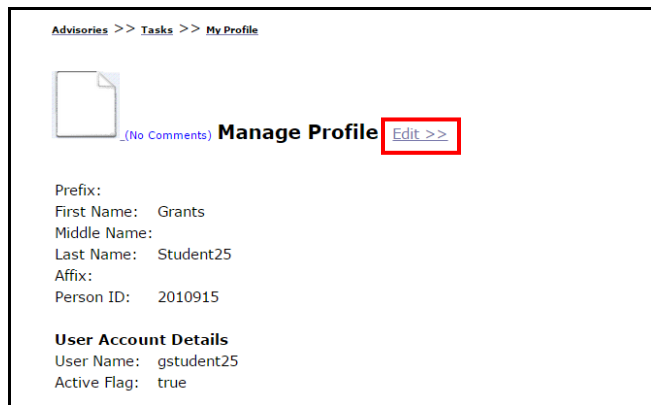
The Account Management Tab allows the user to view and update his/her profile; customize his/her notifications and task preferences; and delegate his/her Inbox to other users.

### Manage the User Profile

1. On the Account Management Tab, click the **My Profile** link.



2. The Manage Profile screen is visible. Click the **Edit** link.



3. The user is presented with a screen on which s/he can modify his/her identifying account information. The variables First Name\* and Last Name\* are mandatory data entry fields.

**Manage Profile**

Prefix:

First Name: \*

Middle Name:

Last Name: \*

Affix:

**User Account Details**

User Name: gstudent25

Active Flag: true

4. Scroll to the bottom of the screen and click the **Save** button. An indicator that data was saved is accompanied by the message “**Save was Successful**” and is displayed at the top left-hand corner of the screen. Although not required, it is strongly suggested that the user click the **Save** button after each modification.

**Save was successful.**

Prefix:

First Name: \*

Middle Name:

Last Name: \*

Affix:

**User Account Details**

User Name: gstudent25

Active Flag: true

**Security Questions**

#	Question Text	Answer Text
1	What is your mother's maiden name?	Jan
2	What is your father's middle name?	Feb
3	What is your mother's middle name?	Mar

[Edit Security Questions](#)

**Affiliations**

Details	Org ID	Organization	Position	Phone	Address
<a href="#">Details</a>	2002468	GOT One Commerce Program Office (OCPO)		301-555-5555	200xx Century Blvd, Germantown, MD 20874-1143 USA

[Add a new affiliation >>](#)

**Assigned Roles**

Role	Org ID	Organization
Federal Program Officer - Certified	2002468	GOT One Commerce Program Office (OCPO)

**Save** [Save and Return To Main](#) [Cancel](#)

- The Security Questions section displays the current questions and corresponding answers. Initially, when a user logs into Grants Online s/he must specify this information. To change or update the questions, click the **Edit Security Questions** button.

Security Questions		
#	Question Text	Answer Text
1	What is your mother's maiden name?	Jan
2	What is your father's middle name?	Feb
3	What is your mother's middle name?	Mar

[Edit Security Questions](#)

- From the screen displayed below, the user can modify his/her questions and answers. Click the **Save** button and updates are confirmed with the message “**Security questions saved successfully.**” Subsequently, the user must click the **Save and Continue** button. If the user opts to just click the **Save and Continue** button, changes are saved but the message does not display.

**Security Questions**

Security questions saved successfully.

- All questions must be answered
- No two questions can be the same
- No two answers can be the same
- Each answer must be at least 3 characters long
- Each answer may only contain alphanumeric characters, the "-", or the "/" characters

Security Question 1 :

Answer :

Security Question 2 :

Answer :

Security Question 3 :

Answer :

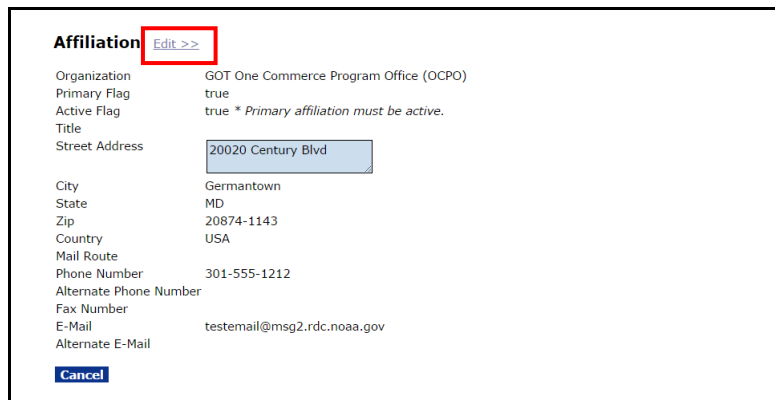
[Save](#) [Save and Continue](#)

NOTE : You will be able to reset your own password in the future if you can answer all 3 security questions with exactly the same answers that you provide here.

- To reset his/her password, the user must provide the correct responses to all security questions. If the user contacts the Help Desk for assistance with a password reset, s/he must provide an accurate response to all security questions. This assures the Help Desk that the user has the right to access the Grants Online account.
- To update his/her affiliations, the user should click the **Details** link under the Affiliations header.

Affiliations						
Details	Org ID	Organization	Position	Phone	Address	E-Mail
<a href="#">Details</a>	2002468	GOT One Commerce Program Office (OCPO)		301-555-5555	200xx Century Blvd, Germantown, MD 20874-1143 USA	testemail@msg2.rdc.noaa.gov

9. When the screen shown below displays, click the **Edit** link.

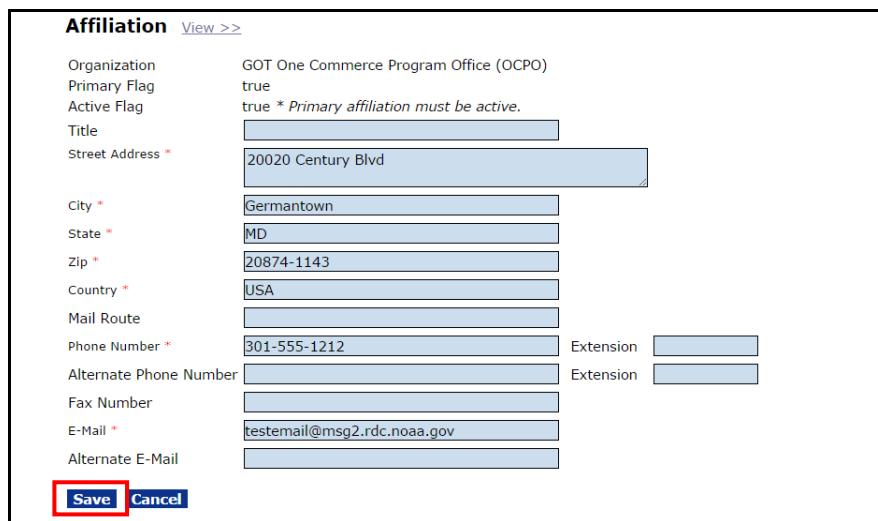


**Affiliation** [Edit >>](#)

Organization GOT One Commerce Program Office (OCPO)  
Primary Flag true  
Active Flag true \* *Primary affiliation must be active.*  
Title  
Street Address 20020 Century Blvd  
City Germantown  
State MD  
Zip 20874-1143  
Country USA  
Mail Route  
Phone Number 301-555-1212  
Alternate Phone Number  
Fax Number  
E-Mail testemail@msg2.rdc.noaa.gov  
Alternate E-Mail

[Cancel](#)

10. As per convention, the data fields with a red asterisk require data. Make the necessary changes and click the **Save** button. If the user opts to click the **Cancel** button, changes are not saved.



**Affiliation** [View >>](#)

Organization GOT One Commerce Program Office (OCPO)  
Primary Flag true  
Active Flag true \* *Primary affiliation must be active.*  
Title  
Street Address \* 20020 Century Blvd  
City \* Germantown  
State \* MD  
Zip \* 20874-1143  
Country \* USA  
Mail Route  
Phone Number \* 301-555-1212 Extension  
Alternate Phone Number Extension  
Fax Number  
E-Mail \* testemail@msg2.rdc.noaa.gov  
Alternate E-Mail

[Save](#) [Cancel](#)



**NOTE:** If a NOAA user wishes to change his/her Organization, s/he must contact his/her Grants Management Advisory Council (GMAC) representative. That person will contact the Help Desk on behalf of the user.

Users from other bureaus should contact the appropriate person in their organization to modify this information.

- The final section on the Manage Profile screen cannot be modified without the involvement of GMAC and the Grants Online Help Desk.

Assigned Roles		
Role	Org ID	Organization
Federal Program Officer - Certified	2002468	GOT One Commerce Program Office (OCPO)

[Done](#)

- Click the **Done** button to finalize the process and return to the main Account Management screen.

Security Questions						
#	Question Text	Answer Text				
1	What is your mother's maiden name?	Jan				
2	What is your father's middle name?	Feb				
3	What is your mother's middle name?	Mar				

[Edit Security Questions](#)

Affiliations						
Details	Org ID	Organization	Position	Phone	Address	E-Mail
Details	2002468	GOT One Commerce Program Office (OCPO)		301-555-1212	20020 Century Blvd, Germantown, MD 20874-1143 USA	testemail@msg2.rdc.noaa.gov

Assigned Roles		
Role	Org ID	Organization
Federal Program Officer - Certified	2002468	GOT One Commerce Program Office (OCPO)

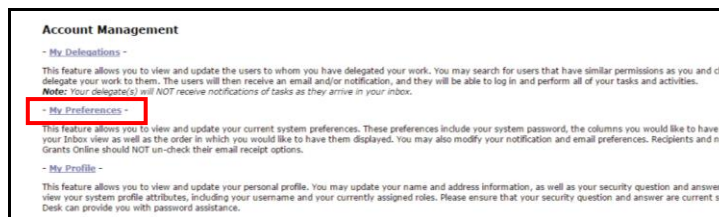
[Done](#)

## User Preferences

The user may customize his/her viewing preferences using the My Preferences link. The user may add/remove email Inbox notifications. This will remove notifications sent to the user's external email account only. Headings may be customized to display certain fields on the user's tasks and notifications screens. Additionally, the user may change his/her Grants Online password.

### Access User Preferences

1. From the Account Management Tab, click the **My Preferences** link.



2. On the screen shown below, the user can customize the page size, number of breadcrumbs, the look and feel, and the workflow warning.

The screenshot displays the "User Preferences" section, specifically "Site Preferences". It contains four input fields, each with a plus/minus icon to its right: "Page Size" (set to 100), "Number of Bread Crumbs" (set to 20), "Look and Feel" (set to DOC), and "Workflow Warning" (set to Yes).

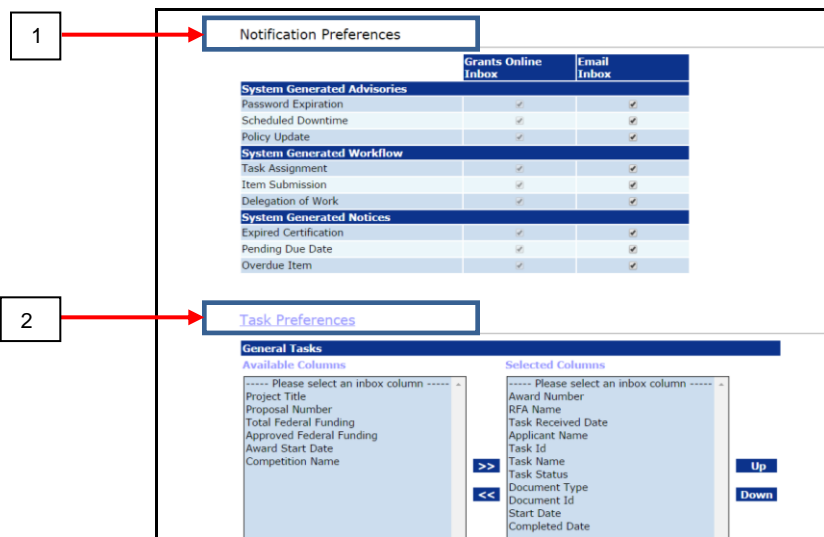
3. Scroll to the bottom of the screen and click the **Save** button to capture the changes.

The screenshot shows the "Award Tasks" section, which is divided into two parts: "Award Tasks" and "Post Award Tasks". Each part has two columns: "Available Columns" and "Selected Columns". The "Available Columns" list includes Project Title, Proposal Number, Total Federal Funding, Approved Federal Funding, Applicant Name, Task Received Date, and Award Start Date. The "Selected Columns" list includes Task Id, Task Name, Award Number, Status, Document Id, Document Type, Start Date, and Completed Date. Navigation buttons (Up, Down, Left, Right) are present between the columns. A red box highlights the "Save" button at the bottom left of the interface.

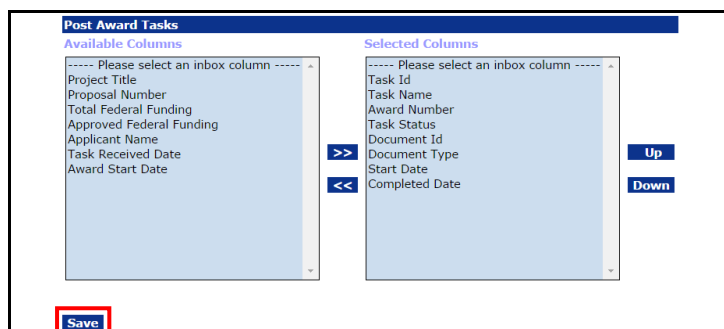


## Customize Tasks

1. The user can modify his/her notifications using the checkboxes in the Email Inbox column (under the **Notification Preferences** section – top portion of the image below). Any modifications only impact the user’s Email Inbox; the Grants Online Inbox specifications cannot be modified.
2. The user can modify the type and order of preferences that display on the screen. To make modifications, click the **Tasks Preferences** link (bottom portion of the image below). The user can modify his/her preferences for General Tasks, RFA Tasks, Award Tasks, and Post Award Tasks.

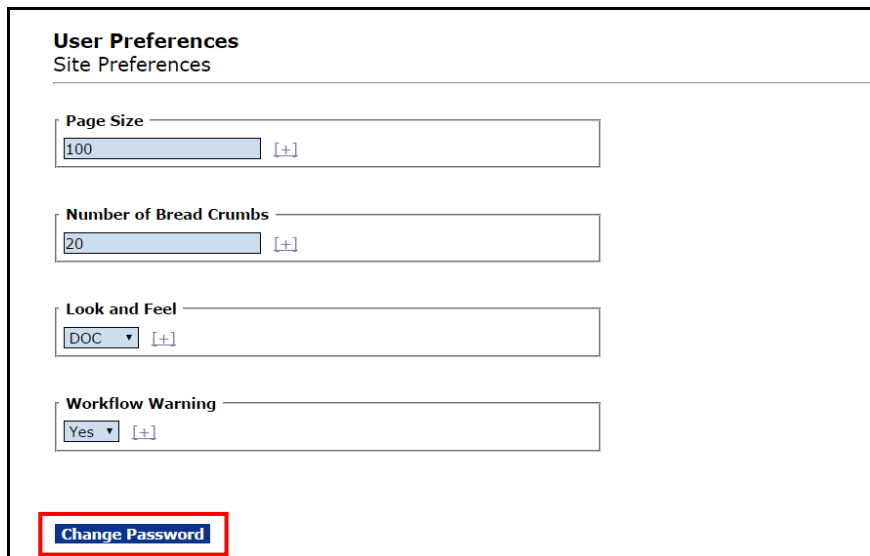


3. For the **Task Preferences**, use the Push [**>>**] and Pull [**<<**] functionality to specify the columns that will display on the Tasks portion of the screen.
4. For the **Task Preferences**, use the Up **Up** or Down **Down** buttons to select the column order that should display on the Tasks portion of the screen.
5. Click the **Save** button at the bottom of the screen. The user has to scroll to the bottom of the screen to see the **Save** button.



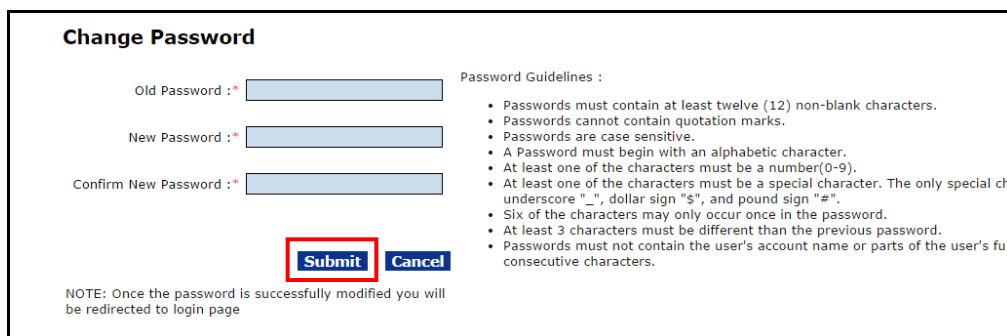
### Change the Password

1. Click the **Change Password** button on the User Preferences screen.



The screenshot shows the 'User Preferences' screen with a 'Site Preferences' section. It contains four settings: 'Page Size' (100), 'Number of Bread Crumbs' (20), 'Look and Feel' (DOC), and 'Workflow Warning' (Yes). At the bottom, a 'Change Password' button is highlighted with a red box.

2. When the change Password screen is visible, specify data for mandatory data fields – indicated by a red asterisk (\*).
  - Enter the old password\*.
  - Enter the new password\*.
  - Enter the new password again to confirm\*.
3. Click the **Submit** button.



The screenshot shows the 'Change Password' screen. It has three input fields: 'Old Password :\*', 'New Password :\*', and 'Confirm New Password :\*'. To the right, there are 'Password Guidelines' listed. At the bottom, the 'Submit' button is highlighted with a red box, and a 'Cancel' button is also visible. A note at the bottom states: 'NOTE: Once the password is successfully modified you will be redirected to login page'.

**Change Password**

Old Password :\*

New Password :\*

Confirm New Password :\*

**Submit** **Cancel**

NOTE: Once the password is successfully modified you will be redirected to login page

**Password Guidelines :**

- Passwords must contain at least twelve (12) non-blank characters.
- Passwords cannot contain quotation marks.
- Passwords are case sensitive.
- A Password must begin with an alphabetic character.
- At least one of the characters must be a number(0-9).
- At least one of the characters must be a special character. The only special characters allowed are underscore "\_", dollar sign "\$", and pound sign "#".
- Six of the characters may only occur once in the password.
- At least 3 characters must be different than the previous password.
- Passwords must not contain the user's account name or parts of the user's full consecutive characters.



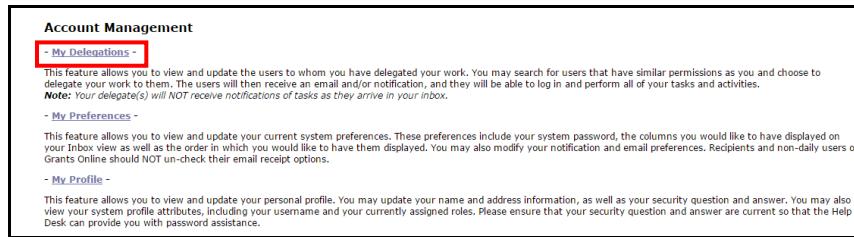
**NOTE:** Follow the Password Guidelines as detailed on the upper right-hand side of the screen. **ONLY** the following special characters are valid: underscore “\_”, dollar sign “\$”, and pound sign “#”.

## User Delegations

When the user selects the **My Delegations** link on the Account Management Tab, s/he will be able to view existing delegates, add delegates, and rescind delegates. A user can only select as a delegate a person with an access level that matches his/hers. For example, a certified program officer cannot delegate to someone who has a lower level of access (e.g., an uncertified Program Officer or a Program Office staff member). In addition to an equivalent level of access, the delegate must have the same organizational affiliation as the delegator.

### Access User Delegations

1. From the Account Management Tab, click the **My Delegations** link.



2. The Delegate Authority screen is visible.

The screenshot displays the 'Delegate Authority' screen. At the top, it states 'You currently have no peers on your list of delegates'. Below this, there is a 'Search for Peers' section with a note: 'Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.' The search criteria include text input fields for 'First Name', 'Last Name', and 'Organization'. The 'Role' field is a dropdown menu with the following options: 'AGO', 'ASAP Authorizer', 'Award Mailer', and 'Budget Officer'.

## Add a Delegate

1. Search for the user(s) who will be chosen as a delegate using the first name, last name, organization or role.
2. Click the **Find Peers** button.

### Delegate Authority

You currently have no peers on your list of delegates

**Search for Peers**  
Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.

First Name:

Last Name:

Organization:

Role:   
ASAP Authorizer  
Award Mailer  
Budget Officer

**Find Peers**

3. When the search results are returned, choose the user you would like to assign as a delegate. Click the **Delegate** button.

### Delegate Authority

You currently have no peers on your list of delegates

**Search for Peers**  
Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.

First Name:

Last Name:

Organization:

Role:   
ASAP Authorizer  
Award Mailer  
Budget Officer

**Find Peers**

**Search Results**

Grants Student00  
Grants Student01  
Grants Student02  
Grants Student03

**Delegate**

- The screen shot below is visible when a person is successfully chosen as a delegate. To specify additional delegates, repeat steps 2-3 as many times as is necessary.

**Delegate Authority**

Current Peers on delegation List:

Action	Prefix	Affix	Name	Phone	Email	Fax	Title	Organization
Rescind			Grants Student00	301-555-1212	testemail@msg2.rdc.noaa.gov			GOT One Commerce Program Office

**Search for Peers**  
Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.

First Name:

Last Name:

Organization:

Role:

- ASAP Authorizer
- Award Mailer
- Budget Officer

**Find Peers**

### Rescind a Delegation

- From the Account Management Tab, click the **My Delegations** link.

**Account Management**

**My Delegations**

This feature allows you to view and update the users to whom you have delegated your work. You may search for users that have similar permissions as you and choose to delegate your work to them. The users will then receive an email and/or notification, and they will be able to log in and perform all of your tasks and activities.  
**Note:** Your delegate(s) will NOT receive notifications of tasks as they arrive in your inbox.

**My Preferences**

This feature allows you to view and update your current system preferences. These preferences include your system password, the columns you would like to have displayed on your Inbox view as well as the order in which you would like to have them displayed. You may also modify your notification and email preferences. Recipients and non-daily users of Grants Online should NOT un-check their email receipt options.

**My Profile**

This feature allows you to view and update your personal profile. You may update your name and address information, as well as your security question and answer. You may also view your system profile attributes, including your username and your currently assigned roles. Please ensure that your security question and answer are current so that the Help Desk can provide you with password assistance.

- The Delegate Authority screen is visible. If the user has assigned one or more person(s) as a delegate, the **Current Peers on Delegation List** will display; otherwise, the user is only presented with the option to Search for Peers.
- Click the **Rescind** link next to the name of the individual(s) you would like to remove as a delegate.

**Delegate Authority**

Current Peers on delegation List:

Action	Prefix	Affix	Name	Phone	Email	Fax	Title	Organization
Rescind			Grants Student00	301-555-1212	testemail@msg2.rdc.noaa.gov			GOT One Commerce Program Office

**Search for Peers**  
Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.

First Name:

Last Name:

Organization:

Role:

- ASAP Authorizer
- Award Mailer
- Budget Officer

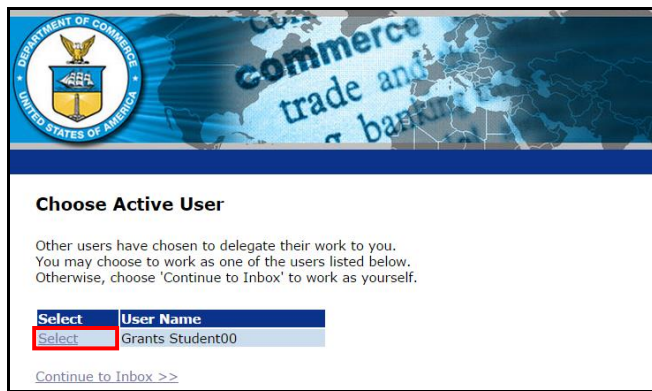
**Find Peers**

**Log In As a Delegate**

1. The user should log in to Grants Online with his/her normal user name.
2. Click the **OK** button on the Notice to Users page.
3. Choose to continue as yourself (click the **Continue to Inbox** link).

-or-

Access Grants Online as the person who assigned you authority to access his/her account (click the **Select** link next to the person’s name).



**NOTE:** When a user is signed into Grants Online as a delegate, the system will identify him/her as a delegate of that individual (see below). The tasks displayed on the screen are the tasks the delegate may perform on behalf of the original user. Both the user and the delegate can work in Grants Online simultaneously.

