Program Module Guide

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I. Programs Module Overview

The **Programs** module in GRANTS allows you to create and edit existing programs, portfolios, and funding information. This user guide presents an overview on the Programs module.

The **Programs** module can be accessed using the red tab (the tab turns blue when you have selected a GRANTS module). The sub-modules are displayed as hyperlinks in the blue banner under the module tabs.

Each user role has different access permissions that will limit the user’s access within the Programs Module. Please see Table 1 for user’s access permissions.

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As shown above, the **Programs** module is only available to the Program Manager and Admin level users. If you do not have this access level and have been asked by your Program Manager to create or update programs, portfolios, and/or funding information, please contact the GRANTS Admin Team at **GRanTSadmin@water.ca.gov**.
II. Programs Sub-Module

The Programs sub-module lists all programs in GRANTS and provides the ability to view and edit existing program information or to add additional programs.

The program name entered in GRANTS must match the program name used for General Obligation Bond Drills exactly.

1. Login to GRANTS at https://grants.water.ca.gov/grants/Login/.

2. Select the Programs module.
3. The **Programs** sub-module is the default page after you select the **Programs** module.

A. **Edit an Existing Program**

1. To edit an existing program click the hyperlink of the program name.
2. You will be directed to the Edit Program page where you can edit existing program information and add or delete fund sources. All fields are mandatory except for Program Code. The program name must be unique; in other words, GRanTS will not allow you to enter a program name that is already in GRanTS. Program Code is optional and is limited to four characters.

3. To disassociate an existing funding source click on the Recycle Bin icon.
4. Click on the **OK** button to confirm the deletion (disassociation).

5. To make a funding source association, click on the **Add New** hyperlink.
6. You will be directed to the **Add Program Fund Source** page where you can select from existing fund sources (bond, chapter, and sections) or create a new funding source using the **Add New Bond**, **Add New Chapter**, and **Add New Section** hyperlinks (see **Funds sub-module**).

7. Select the **Bond Number** and **Chapter Name** you want to associate with the program by using the drop down list. Once the selections are made, available bond sections will appear in the **Available Sections** panel. Highlight the appropriate section(s) and click on the double right (>>) arrow button.
8. Click on the **Save** button when entries have been completed.

![Program Module Guide Image]

**B. Create a New Program**

1. To create a new program, click on the **Add New** hyperlink.
2. Enter the program name in the **Name** field. Using the drop down list, specify the DWR organization unit responsible for managing and reporting on the program in the **Organizational Unit Name** section. Next, select the portfolio the program is part of using the **Portfolio Name** drop down list. If the portfolio is not available in the drop down list, you can add the portfolio using the **Add New** hyperlink (see **Portfolios sub-module**). Finally, identify the program manager in the **Program Manager Name** field. Program Code is optional and is limited to four characters.

3. Once all required details are complete, click on the **Save** button.

4. After you click Save, you will get a message that says **Program created successfully** and the Fund Source section will appear below it. To link the program that you just created to a funding source, see steps 2-9 in the **Edit an Existing Bond section**.

**Program name must be unique. If you receive an error when saving, the program is already in use. If your program has multiple fund sources, please enter all of them.**
III. Portfolios Sub-Module

The portfolio sub-module is used for reporting purposes and tracks programs in GRANTS. Portfolios are comprised of groups of organizationally or functionally related programs that are grouped to facilitate effective management of that work.

A portfolio can have multiple programs but a program can only be associated to a single portfolio.

1. Click on the Portfolios Sub-Module.

A. Edit an Existing Portfolio

1. To edit an existing portfolio click on the hyperlink for the portfolio’s name.
2. You will be directed to the **Add/Edit Portfolio** page where the portfolio name and manager can be edited, and where you can add programs to the portfolio. When your edits are complete, click on the **Save** button to finalize the changes.

3. A new program can be added to GRANTS via the **Add New** hyperlink. It will be automatically associated with the portfolio.
4. You will be directed to the Add Program page where the program details are entered (see Create A New Program section). Repeat step 3 for adding programs as needed.

B. Add a New Portfolio

1. To add a new portfolio, click on the Add New hyperlink.

2. You will be directed to the Add/Edit Portfolio page where you can enter the portfolio name and manager name. Once the information has been entered, click on the Save button to create the new portfolio.
3. You will get a message that says **Portfolio created successfully** and the **Programs** section will appear below it. To link existing programs to the portfolio, go to the Programs sub-module and change the portfolio association (see Edit an Existing Program section) or click on the **Add New** hyperlink to create a new program (see Create A New Program section).
IV. Funds Sub-Module

Funding source allocations are stored in the GRANTS Funds sub-module. All bonds, chapters and sections from Proposition 13, 50, 84, 204 and 1E are in GRANTS. The allocation amounts from the original bond measures were used to populate the chapter and section allocations in GRANTS. To update the information or allocations, or to add an entirely new funding source, follow the instructions below.

New fund sources should only be added in the event of a new Bond Act. Please contact the GRANTS Admin at GRANTSadmin@water.ca.gov before adding any new Bonds.

1. Click on the Funds Sub-Module.

A. Edit an existing Bond

1. To edit an existing bond, click on the hyperlink for the bond name.
2. You will be directed to the **Add/Edit Bond** page where the details of the bond measure are displayed. Edit the fields as necessary and click on the **Save** button to save the changes. The **Cancel** button returns you to the Bonds page without saving any changes.

3. To edit the funding chapter information, click on the hyperlink of the **Chapter Name**.
4. You will be directed to the **Edit Chapter** page. Edit the fields as necessary and click on the **Save** button to save the changes.

5. You will get a message that says **Update successful** when the changes have been updated in **GRANTS**. The **Cancel** button returns you to the **Add/Edit Bond** page without saving any changes.
6. To edit funding section information, click on the hyperlink of the section name. Edit the fields as necessary and click on the **Save** button to save the changes. The **Return** button returns you to the **Edit Chapter** page without saving any changes.

![Edit Section](image)

**B. Add a New Bond**

1. The **Add New** hyperlink allows you to add a new funding source.

![Bonds](image)
2. You will be directed to the **Add/Edit Bond** page. Enter the information for the funding source and click on the **Save** button to create the new funding source. The **Cancel** button returns you to the Bonds page without saving any changes.

3. After the new funding record has been created in GRANTS, a message will display on the bottom, **Bond created successfully**, and the **Chapters** section will appear below it. To add a new chapter, click on the **Add New** hyperlink under **Chapters**.
4. You will be directed to the Add Chapter page. Enter the information for the funding chapter and click on the Save button to create the new funding chapter. The Cancel button returns you to the Bonds page without saving any changes.

![Add Chapter screenshot]

5. After the new funding chapter record has been created in GRANTS, you will be directed to the Edit Chapter page. A message will display on the bottom, Chapter created successfully, and the Sections section will appear below it. If you want to add a new funding source section, click on the Add New hyperlink under Sections; otherwise, click on the Cancel button to return to the Add/Edit Bond Page.

![Edit Chapter screenshot]
6. If you selected the **Add New** hyperlink, you will be directed to the **Add Section** page. Enter the information for the funding section and click on the **Save** button to create the new funding section. The **Return** button returns you to the Bonds page without saving any changes.

After the new funding section record has been created in **GRANTS**, a message will display on the bottom, **Section created successfully**, and you will be directed to the **Edit Section** page.
7. If you want to make changes to the Funding Section information, make the changes on this page and click on the **Save** button; otherwise, click on the **Return** button to take you to the Chapter page.
8. To add additional chapters and sections to a funding source, click on the hyperlink of the funding source name in the **Funds** sub-module.

9. You will be directed to the **Add/Edit Bond** page. To add new funding source chapters, click on the **Add New** hyperlink under **Chapters** and you will be directed to the **Add Chapter** page. Repeat steps 4 and 5 to add additional chapters.
10. To add additional funding source sections, click on the hyperlink of the funding source chapter name and you will be directed to the **Edit Chapter** page. Click on the **Add New** hyperlink under **Sections** and you will be directed to the **Add Section** page. Repeat steps 6 and 7 to add additional sections.