GRANTS

GRANTS REVIEW AND TRACKING SYSTEM

Frequently Asked Questions

June 2013

Department of Water Resources

Project Services Office

Contents

I. Introduction

A. Purpose

The purpose of this document is to answer the most commonly asked questions about the Grants Review and Tracking System (GRANTS) in a simple step-by-step manner.

B. Scope

This document provides a brief step by step process for doing the most commonly executed tasks in GRANTS. For more detail and screen shots, please refer to the GRANTS Public User Guide.

C. Name Change from BMS to GRANTS

The Department of Water Resources changed the name of the Bond Management System to Grants Review and Tracking System in June 2013. There were no changes to how the system works. It was simply a name change. We set up an automatic redirect that will send you to the new website. The automatic redirect is temporary, so be sure and update your bookmarks.

D. Supported Web Browser

GRANTS runs best on Internet Explorer 7. If you use other website browsers, GRANTS may not run properly or at all. You can download IE at: http://www.microsoft.com/windows/internet-explorer/default.aspx

II. Frequently Asked Questions

1. How do I get an account on GRANTS?

1) Navigate to http://www.water.ca.gov/grants/.
2) Click on the "Registration" link.
3) Enter the required information on the "Contact" tab and click on the "Next" button.
4) Enter the required information on the "Organization" tab and click on the "Next" button. If your organization is not in the drop-down list, then add your organization first (See FAQ 2).
5) Enter the required information on the "Account" tab and click the "Submit" button.
6) This will create an account for you in GRANTS and a prompt will be displayed to register your organization if the organization is not already registered with GRANTS.

2. How do I add my organization on GRANTS?

1) Navigate to http://www.water.ca.gov/grants/.
2) Click on the "Registration" link.
3) Enter the required information on the "Contact" tab and click on "Next" button.
4) Click on the "Add New" link below the "Organization" drop-down list
5) Enter the required information and click the "Save" button.
6) On the "Account" tab enter your login information and click the "Save" button.

Note: Adding your organization does not mean that the organization is registered. To register your organization, see FAQ 3.

3. How do I register my organization with GRANTS?

You can do this in two ways –

1) Follow the steps in FAQ 2, and click "Yes" on the pop-up when asked "Do you want to register your organization with GRANTS." Enter the required information and click the "Register" button.

Note: While providing the "Administrator's Email," please make sure that the user (and hence the email) is registered with GRANTS. To register a user, see FAQ 1.

2) Follow the steps in FAQ 2, and click "No" on the pop-up; "Do you want to register your organization with GRANTS."
   a) Navigate to "Home->My Profile."
   b) Click on the "Organization" tab.
   c) Click on the link "Selected Organization <Your Organization Name> is not Registered" on the top right corner of the "Organization Data" table.
   d) Enter the required information and click "Register" button.

Note: You can also logout and login later to complete the registration process by navigating to "Home->My Profile" and then following the steps in 2.

4. How do I become an Authorized User when I join an existing organization?

1) Navigate to your Home tab and you will see the email address of your Organization Administrator.
2) Send an email to the Organization Administrator and ask the person to "Authorize" your GRANTS account.

5. How do I authorize new users joining my organization?

1) Click on the "Organization Admin" tab and click on "User Management."
2) Select your Organization from the drop-down list.
3) Enter the email id of the user you wish to authorize
4) Check the "Authorized" checkbox
5) Click "Save."

6. What do I do if I forget my Password?

1) Navigate to http://www.water.ca.gov/grants/.
2) Click on the "Forgot Password" link.
3) Enter your registered email ID and click "Validate User ID" button.
4) Answer the security questions correctly.
5) An email will be sent to you with your temporary password.

Note: If you answer your security questions incorrectly three times, your account will be locked and you will need to contact the DWR GRANTS Administrator by emailing at GRANTSadmin@water.ca.gov or calling 1-888-907-4267 to get your account unlocked.

7. How do I become the Organization Administrator for my Organization?

1) Navigate to http://www.water.ca.gov/grants/. If you are a new user and you belong to an organization which is not registered with GRANTS, follow FAQ 1 to set up an account.
2) Follow FAQ 2 to register your organization. While registering your organization, enter your registered email address in the "Organization Admin's email" box.
3) If your organization is already registered with GRANTS then it already has an admin. Contact your organization admin to add you as one.

8. How do I add another user as an Administrator for my Organization?

1) Navigate to http://www.water.ca.gov/grants/.
2) Login with your Organization Admin ID and password.
3) Click on the "Organization Admin" tab and click on "User Management."
4) Select your Organization from the drop-down list.
5) Click on the "Add New" link.
6) Enter the email id of the user you wish to add as an Admin.
7) Check the "Organization Admin" and "Authorized" check-boxes.
8) Click "Save."

9. How do I allow other users to see my Organization's proposals?

1) Navigate to http://www.water.ca.gov/grants/.
2) Login with your Organization Admin ID and password.
3) Click on the "Organization Admin" tab and click on "User Management."
4) Select the Organization from the drop-down list.
5) Click on the "Add New" link.
6) Enter the email id of the user you wish share your proposals with.
7) Check the "Authorized" checkbox
8) DO NOT check the "Organization Admin" checkbox.
9) Click "Save."

10. What do I do if I get locked out of GRANTS and cannot log in?

Organization Administrators - contact the GRANTS Admin at GRANTSadmin@water.ca.gov or 1-888-907-4267.

Other Public Users – Contact your Organization Admin.

11. How do I unlock accounts of the locked users of my organization?

1) Navigate to http://www.water.ca.gov/grants/.
2) Login with your Organization Admin ID and password.
3) Click on the “Organization Admin” tab and click on “User Management.”
4) Select the Organization from the drop-down list.
5) Click on the locked user’s email id from the list of user id’s displayed.
6) Uncheck the Lock/Unlock check box.
7) Click “Save.”

12. How do I start a proposal for a Proposal Solicitation Package (PSP)?

1) Navigate to http://www.water.ca.gov/grants/.
2) Login with your username and password.
3) Click on the number of new solicitations link on your homepage OR navigate to “PSP’s->All PSP’s” tab.
4) Choose the PSP you are interested in from the available list and then click on the “Start Proposal” link in the “Action” column. You should save your work by clicking on the “Save” button and visit later to complete your proposal.
5) Once the proposal is saved the first time, it is added to your “My Proposals” list. The next time you login you can continue preparing your proposal by navigating to “PSP’s->My Proposals” and clicking on the proposal name. If the PSP’s due date has already passed, you cannot start a proposal for it.

13. How do I submit a proposal?

1) Follow the steps in Question 12 to start preparing a proposal and completing it. Make sure you have filled out all the tabs and required questions marked with an asterisk before submitting. The system will not allow you to submit it unless all required fields are filled.
2) Once it is complete, click on the “Submit” button on the bottom of any of the tabs in the PSP.

14. How can I access all the attachments associated with a PSP?

1) Navigate to http://www.water.ca.gov/grants/.
2) Login with your Organization Admin ID and password.
3) Click on the “PSPs.”
4) On the list of all Active PSPs you can select the PSP of your choice and click on the “Attachments” link in the “Attachments” column to go to the attached files.
5) If you have created the PSP on your own then you can click on the link in the “Status” column on My PSPs page. This will take you to the status page where you can find the attachments associated with the PSP.

15. How do I submit a comment or document to DWR?

You can submit any of the following:

- A proposal related comment or document.
- A project related comment or document.
- A contract related comment or document.

For proposal related comment or document –

1) Navigate to http://www.water.ca.gov/grants/.
2) Login with your user ID and password.
3) Click on the "PSPs" tab and then click on "My Communications."
4) Click on "Add New."
5) Enter relevant information and click "Save."

For project related comment or document –

1) Navigate to http://www.water.ca.gov/grants/.
2) Login with your user ID and password.
3) Click on "Projects" tab.
4) Select the project you want to add the communication to by selecting the program and the year and clicking filter.
5) Click on the project name.
6) Click on the "Communication" tab.
7) Click on the "Create Note" link.
8) Enter relevant information and click "Save."

For contract related comment or document –

1) Navigate to http://www.water.ca.gov/grants/.
2) Login with your user ID and password.
3) Click on "Contracts" tab.
4) Select the Contract you want to add the communication to by selecting the program and the year and clicking filter.
5) Click on the contract number.
6) Click on the "Communication" tab.
7) Click on the "Create Note" link.
8) Enter relevant information and click "Save."

16. I have been assigned the project manager for a project, how do I view my projects?

1) Navigate to http://www.water.ca.gov/grants/.
2) Login with your username and password.
3) Click on the "Projects" link.

4) Click on “My Projects” sub-menu.
5) To view projects from a specific Program and Year, select these values from the dropdown boxes and click “Filter” button.
6) All the projects associated with that program and year will be displayed.
7) You can also view all projects by selecting “All Programs” and “All Years” under the dropdowns and clicking “Filter.”

17. I have been assigned the contract manager for a contract, how do I view my contracts?

1) Navigate to http://www.water.ca.gov/grants/.
2) Login with your Organization Admin ID and password
3) Click on the “Contracts” link.
4) Click on “My Contracts” sub-menu.
5) To view Contracts from a specific Program and Year, select these values from the dropdown boxes and click “Filter” button.
6) All the Contracts associated with that program and year will be displayed.
7) You can also view all Contracts by selecting “All Programs” and “All Years” under the dropdowns, check “View All Contracts” and click “Filter” button.

18. How do I submit an invoice as Organization Admin?

1) Navigate to http://www.water.ca.gov/grants/.
2) Login with your Organization Admin ID and password.
3) Click on Contracts menu and select the contract for which you wish to submit an invoice then click on the Contract Number link.
4) Click on the Invoice tab in the Contract workbook.
5) Click on the “Add New” link on top left of the invoice list if you are creating the invoice for the first time. If you have already created and saved an invoice and wish to submit or edit it then click on the “Pending” link in the Invoice Number column.
6) Enter the required fields and click Add New Line Item link on the Invoice sheet.
7) Enter the required fields and click on “Save” button. Click on the “Submit” button to submit the Invoice.

19. What do I do if my attachment file exceeds the file size limit?

There are two options for you in this case. First you can zip (compress) the file if the file is not far over the limit. Second if the file far exceeds the file size limit you can split the file into multiple files and attach them separately. If neither of these options will work for your files please contact the appropriate program staff for further direction.

20. Will multiple personnel be able to access the application for a specific organization?

Yes, all registered members of an organization have access to all applications associated with that organization. By going to the "PSP" tab under "My Proposals" any member of that organization will be able to edit, save, and submit the application on behalf of the organization. It is important to ensure that two users do not access the same application at the same time. Should that occur, work may be overwritten in the event two versions are saved by two users.

21. How does the admin function work for the external user side?

The Organization Admin in tab in GRANTS allows an Organization Admin to add and authorize users to access projects, contracts, and fill out applications on behalf of their organization. For users that are no longer associated with an organization, you can delete the users from the organization's user list or uncheck the "Authorized User" box in the "Add/Modify User" screen.

22. How does a consultant select and fill out applications for several clients?

The consultant will need to get each Organization Admin to add their account to that organization's authorized user list. Consultants must be registered in GRANTS before another organization can add them as a user. The consultant will need to be authorized by each organization they are assisting.

23. How does an external user admin remove a user that is no longer a part of their organization?

The organization's GRANTS administrator will go to the "Organization Admin" tab in GRANTS and select their organization in the drop window. The administrator can then select an individual's account and make appropriate changes by removing their authorization or delete them entirely.

24. What is the character limit for the answer boxes?

A small indicator in the lower left-hand corner will indicate the number of characters allowed in the box. Please remember characters include letters, numbers, spaces and punctuation. Also, if you are importing a file from MS Word or another word processor, hidden characters can import and cause you to exceed your expected count.

25. Sometimes my page won't save or the system crashes when I try to save, what do I do?

Most often there is an answer that has exceeded the character limit; or an answer is required (noted by an *) that hasn't been completed. Go back over the questions carefully and be sure they are complete and that the character limits have not been exceeded. If you think you are close to a limit, remove a few words to account for possible hidden characters due to formatting.

26. Will I receive an automatic e-mail notification that my Proposal has been submitted?

Yes. The system generates an e-mail notification when you submit your proposal. The e-mail will be sent to the e-mail address that was used to log-in to GRANTS at the time the proposal was submitted. Also, you will see a status change on your home page that the proposal has been submitted.