

GRANTS

GRANTS REVIEW AND TRACKING SYSTEM

Public User Guide

June 2016
Department of Water Resources
Project Services Office

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I. Introduction

Welcome to the Grants Review and Tracking System (GRANTS) for the California Department of Water Resources. Your organization can ensure efficient contract management and project oversight by using GRANTS. GRANTS is an interface that enables the project team to work together to manage contracts terms, project tasks, expenditures and deliverables. DWR and Project Partners will track:

- Bond funds, cost-share from other state, federal, local or other contributions that sum to the total project amount
- Milestones and project tasks
- Expenditures vs. percentage of work complete
- Deliverables
- Checklists of customizable items
- Invoice payment process
- Task level details

This guide provides screen-by-screen instructions for using GRANTS. If you need additional assistance, contact us at (888) 907-4267 or GRANTSadmin@water.ca.gov.

To use GRANTS you must create an account through the registration process ([Figure 1: Registering in GRANTS](#)).

Once you are registered you can use the system to prepare and submit proposals for an online solicitation, view contracts & projects, manage your organization’s interaction with DWR, and prepare and submit invoice summaries and other activities that are related to the administration of Bond Funds through DWR.

Modules within GRANTS can be accessed using the **RED** tabs (the tab turns **BLUE** when you hold your mouse over it). The Sub-Modules are displayed as hyperlinks in the blue banner under the Module tabs. Within the Sub-Modules, the information presented may be further divided into Workbooks which are shown as gray tabs in the main display panel.

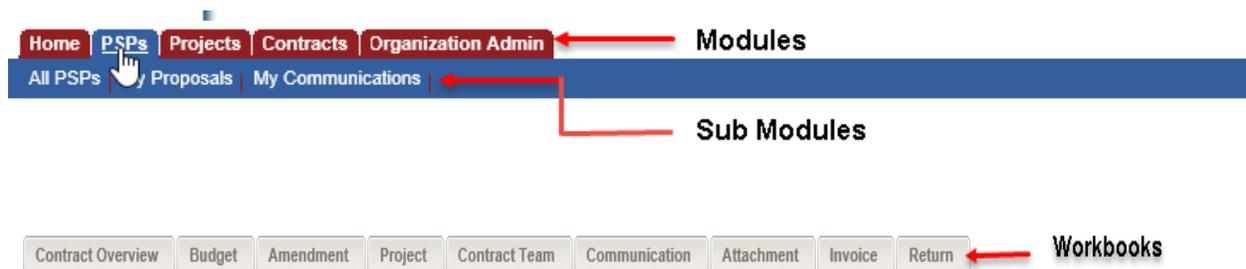
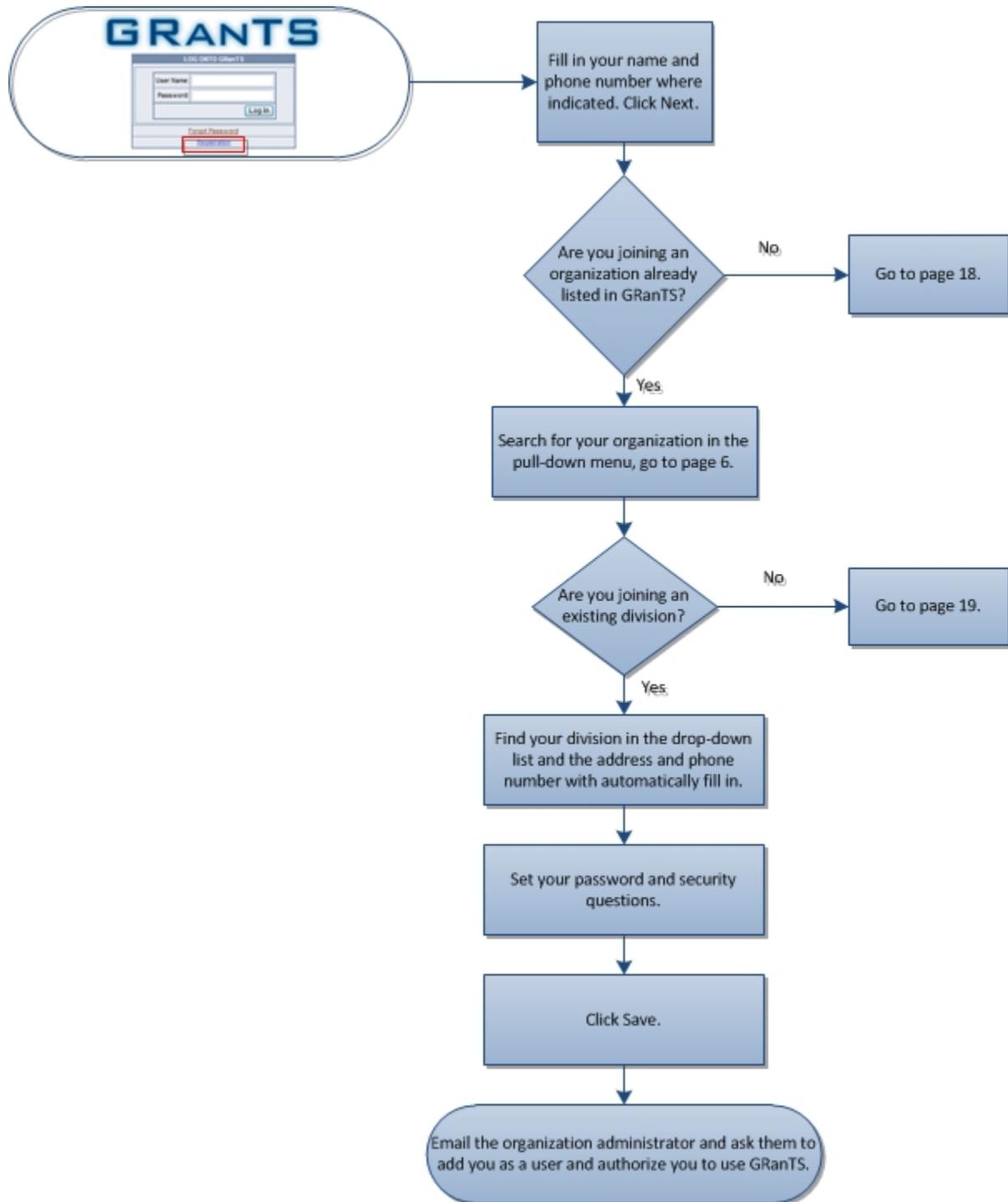


Figure 1: Registering in GRANTS



II. Getting Started

The GRANTS Home page is located at: <http://www.water.ca.gov/grants/>.

Browser Requirements: Internet Explorer or Google Chrome.

- GRANTS does not support Safari or Mozilla Firefox.

The following graphic shows the GRANTS Home page:

CA.gov | Help | Accessibility

CA.GOV CALIFORNIA DEPARTMENT OF WATER RESOURCES

HOME NEWSROOM & EVENTS ISSUES ABOUT US

Search

DWR California

GRANTS

GRANTS REVIEW AND TRACKING SYSTEM

Welcome to the Department of Water Resources (DWR) Grants Review and Tracking System. GRANTS is a web-based tool that can be used to:

- Apply for bond funded grants and loans.
- Manage bond funded contracts and track projects.
- Submit electronic contract deliverables and invoices.

Open Solicitations

- The [Proposition 84 IRWM Implementation Grants Program](#) released the final 2015 IRWM Program Guidelines and Proposal Solicitation Package (PSP) on May 13, 2015. Applications must be submitted by 5:00 p.m. on August 7, 2015.
- Please "Sign in" to access the GRANTS application.

GRANTS Outages

- Thursday, June 25, 2015 from 5:00 PM to 8:00 PM for maintenance and upgrades.

Recent Changes in GRANTS

- **05/06/2015:** GRANTS identifies browser and displays message specific to the browser with detailed instructions to view in Compatibility View Mode.
- **04/21/2015:** Users can sort lists in My/All Projects, My/All Contracts, My Proposals, PSPs Summary, and All Proposals modules without any problems and easily identify the column sorted by.
- **02/02/2015:** Users can return to the page they left on the list of My/All Projects or My/All Contracts, when the user clicks Return workbook (gray tab). DWR reviewers can use Review Import feature without any problems. In addition to Project Name, Program Name, Start Date, and End Date, My Projects and All projects now include BMS I/O Group Code, Project Status, and Project Cost.
- **11/24/2014:** DWR users can view all proposals for a proposal solicitation package in read-only format. This allows reviewers to have access to all proposals, not just the ones they are reviewing.
- **10/09/2014:** Users can filter Contracts by Program, Organization, DWR Contract Manger, Start year, End year, Contract Number and Contract name.
- **9/03/2014:** GRANTS is now compatible with Google Chrome on both Mac and Windows operating systems. GRANTS was tested and verified only for external users on Google Chrome Version 36.0.1985.143. In addition to File Name, Description, Type and Author, attachments now include Date of Upload, Last Modified By and Last Modified Date.
- **7/28/2014:** GRANTS now emails project and contract managers when attachments or communications are added to their projects, contracts or invoices.
- **5/29/2014:** Users can filter the Attachments list in the Contract and Project Modules by Author and/or File Name.

Sign in

HOME

USER GUIDES

- » [Quick Start Guide](#)
- » [Public User Guide](#)
- » [Frequently Asked Questions \(FAQ\)](#)

INTERNAL (DWR) USER GUIDES

VIDEOS

- » [How to Register \(New\)](#)
- » [How to Complete a Grant Application \(New\)](#)

PROJECT MAPPING TOOL

FINANCIAL ASSISTANCE

SUPPORT

GRANTS Helpdesk
Tel: (888) 907-4267
Email: GRANTSadmin@water.ca.gov

[f](#) [t](#) [v](#)

The GRANTS Home Page has information we encourage you to read before you begin using GRANTS. Please review this guide, the [Quick Start Guide](#), [Frequently Asked Questions](#) and other training tools located at this site.

To begin, click on the **Sign In** button near the top of the page.

If you have already created an account, enter your **User Name** and **Password** and click on the **Log In** button to sign in to GRANTS.



If you have not created an account, click on the **Registration** hyperlink and you will be brought to the **User Registration** page.

On this page, the following three tabs are visible:

- Contact
- Organization
- Account

User Profile			
Contact Organization Account			
Organization:	Search for Organization... * Add New	Division/Address List:	Search for Division... * Add New
Address1:	*	Address2:	
City:	*	State:	California *
Zip:	*		
Next		Cancel	

In the **Contact** Tab, fill out your **First** and **Last Name** and **Phone (Office)** information then click on the **Next** button.

User Profile

Contact Organization Account

First Name:	Phil *	Phone (Office):	(916) 878-6545Ext:3 *
Middle Name:		Phone (Direct):	() - - Ext: -
Last Name:	Berman *	Phone (Mobile):	() - -
		Fax:	() - -

Next Cancel

NOTE: The fields marked with a red asterisk (*) are mandatory and must be completed.

Now the **Organization** tab will be displayed. For detailed information about searching, adding, or joining an organization, please refer to the [Organization Section](#) of this guide. You can either start typing the name of your organization in the **Organization** dropdown menu to narrow the list to show only matching organization names or you can scroll through the organizations without refining your search. Click on the name of your organization once you have found it.

User Profile

Contact Organization Account

Organization:	Search for Organization... *	Add New	Division/Address List:	Search for Division... *	Add New
Address1:		*	Address2:		
City:		*	State:	California	*
Zip:		*			

Next Cancel

User Profile

Contact Organization Account

Selected Organization 'West Sacramento' is Registered.

Organization:	West Sacramento *	Add New	Division/Address List:	Search for Branch... *	Add New
Address1:	District *		Address2:		
City:	West Lake Resource Conservation District *		State:	California	*
Zip:	West Sacramento *				

West Valley Water District
West Yost
Western Canal Water District
Western Canal Water District
Western Municipal Water District

Next Cancel

Once you have chosen an organization, select a Division from the **Division/Address List** dropdown field.



If you cannot find your **Organization** or **Division**, click on the **Add New** hyperlink located next to the corresponding dropdown menu. For additional details pertaining to adding a new **Organization** or **Division**, click on one of the following links: [Click here to add a new Organization](#) and [click here to add a new Division](#).

Values for the **Address**, **City**, **State**, **Zip**, **Phone**, and **Web site** fields for the selected Organization and Division will be auto-populated by the system once a Division has been selected from the dropdown menu.



If you share a Tax Identification Number (TIN) with a higher level organization (i.e., *Plumas County Water and Power Agency* and *Plumas, County of*) be sure to register the higher level organization (*Plumas, County of*) and create the lower level organization (*Plumas County Water and Power Agency*) as a division of that organization. Failure to do so can result in multiple divisions of a county or city trying to use the same TIN. The TIN must be unique to an organization.

Click on the **Next** button to continue on to the **Account** tab.

User Profile

Contact Organization **Account**

Selected Organization 'West Sacramento' is Registered.

Organization:	West Sacramento	* Add New	Division/Address List:	Division 1 : 383838,Sacramento	* Add New
Address1:	383838	*	Address2:		
City:	Sacramento	*	State:	California	▼ *
Zip:	93939	*			

In the **Account** section, you will need to do the following:

- Specify a **Username** (your email address: JDoe@gmail.com).
- Specify a **Password** (must be at least 7 characters long and must contain at least three of the following four groups: lowercase alpha, uppercase alpha, numeric, and special characters).
- Confirm the **Password**.
- Select a Security Question from the **Security Question 1** dropdown selection.
- Provide an **Answer** to the selected Security Question 1.
- Select a Security Question from the **Security Question 2** dropdown selection.
- Provide an **Answer** to the selected Security Question 2.

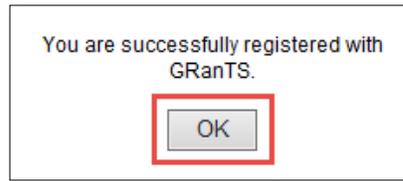
Finally, click on the **Save** button to complete your registration.

User Profile

Contact Organization **Account**

Username/Email:	philberman@yahoo.com			*	
Password:	●●●●●●●●			*	
Confirm Password:	●●●●●●●●			*	
Security Question 1:	In what city or town was your first job?	▼	Answer:	Sacramento	*
Security Question 2:	What was the name of your high school?	▼	Answer:	San Juan	*

The **User Registration Confirmation** popup window will show that: “You are successfully registered with GRANTS.” Click on the **OK** button to go to your home screen.



If the system reports that **Selected Email is already registered with GRANTS** when you click on the **Save** button, then an account with that username has already been created in GRANTS. Call (888) 907- 4267 or email GRANTSAdmin@water.ca.gov if this occurs.

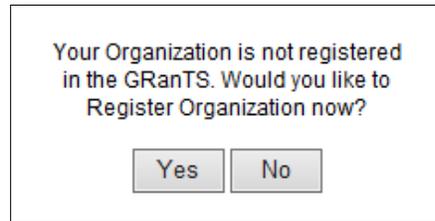


The screenshot shows a "User Profile" form with three tabs: "Contact", "Organization", and "Account". The "Account" tab is selected. The form contains the following fields:

Username/Email:	<input type="text" value="jacobingle25@yahoo.com"/>	*
Password:	<input type="password"/>	*
Confirm Password:	<input type="password"/>	*
Security Question 1:	<input type="text" value="In what city or town was your first job?"/>	▼
Answer:	<input type="text" value="Sacramento"/>	*
Security Question 2:	<input type="text" value="What was the name of your high school?"/>	▼
Answer:	<input type="text" value="San Juan"/>	*

At the bottom of the form are "Save" and "Cancel" buttons. Below the buttons, a red error message is displayed: "Selected Email is already registered with GRANTS."

If the Organization selected (on the Organization tab) during User Registration is a new (unregistered) Organization, then the following additional message is displayed at the end of the User Registration process, “Your Organization is not registered in the GRANTS. Would you like to Register Organization now?” To register your organization, please follow the instructions in the [Organization Registration](#) section of this guide.



Only the Organization Administrator can register an Organization in GRANTS. Login to GRANTS and the Organization Administrator will be shown on your home page. Contact the Organization Administrator and ask them to register the Organization. If no Organization Administrator is shown on your home page, contact GRANTSadmin@water.ca.gov to register the organization.

III. GRANTS Home Screen

Enter your e-mail and password to log in to GRANTS.



You will be brought to your **Home** page. This page displays the number of Proposal Solicitation Packages (PSPs) that can be applied for, the name and contact information for all Organization Administrators for each organization of which you are a member, and the statuses of your applications.



Organization Name	Administrator	Email	Phone Number
West Sacramento	Jacob (external)	jacobingle25@yahoo.com	(916) 651-9619
West Sacramento	Jacob	ingle@yahoo.com	(916) 223-5987



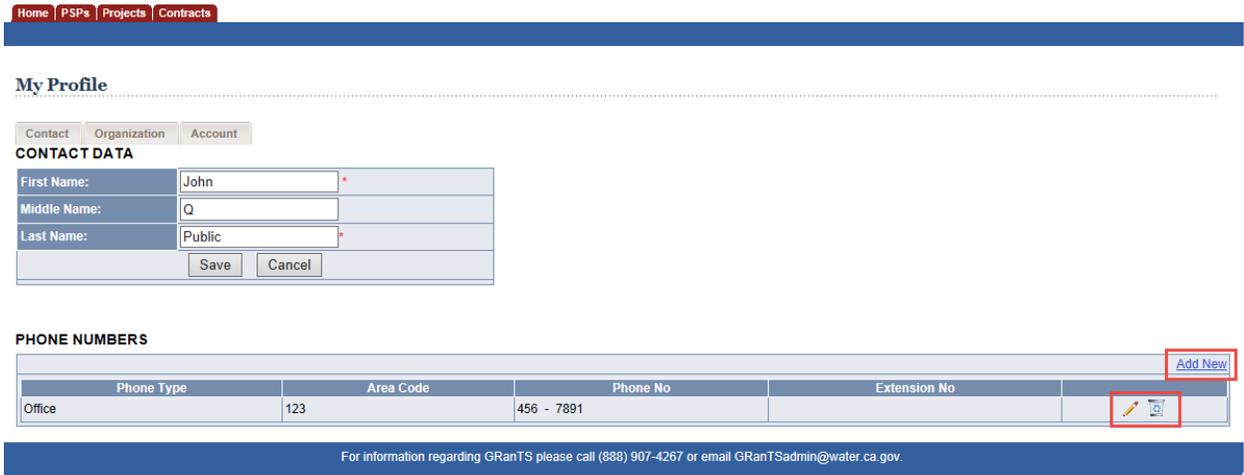
To view projects, contracts, and proposals that belong to an organization, send an email or call the organization’s administrator to ask for access. The Organization Administrator’s contact information is listed on the right side of your **Home** page as circled above.

IV. My Profile

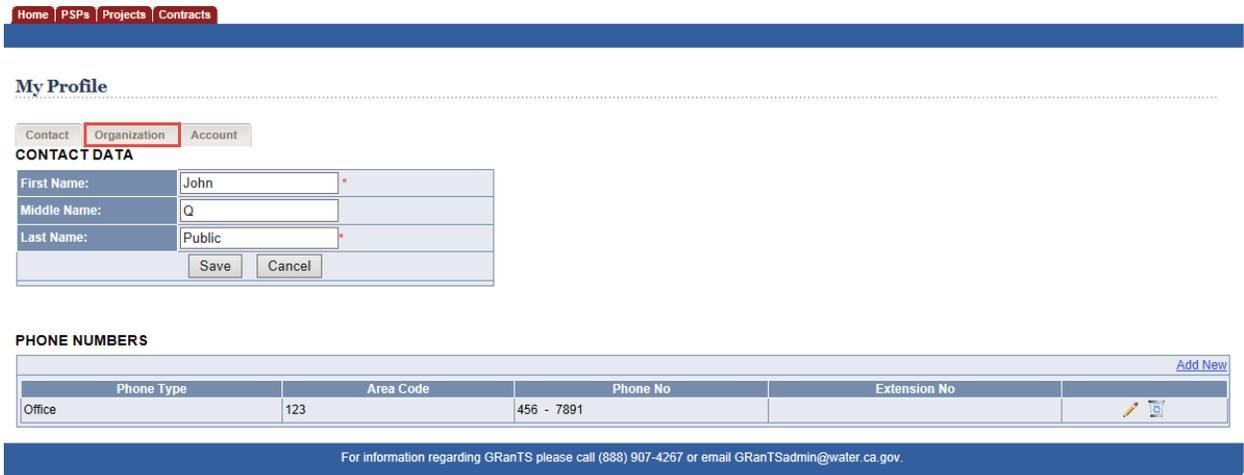
To edit your personal profile, click **My Profile** under the **Home** tab.



The **My Profile** screen will be displayed. To edit or delete a phone number, click on the **Pencil** or **Trash** icon on the far right side of the screen. To add an additional phone number, click on the **Add New** hyperlink.



To become a member of another organization, navigate to the **Organization** workbook tab.



From here, select the name of the organization you would like to join from the dropdown menu, select a division, and click on the **Save** button.

The screenshot shows the 'My Profile' page with the 'Organization' tab selected. The 'ORGANIZATION DATA' form contains the following fields:

- Organization: West Sacramento (dropdown menu) with an [Add New](#) link.
- Division/Address List: Division 1 : 383838, Sacramento (dropdown menu) with an [Add New](#) link.
- Address1: 383838
- Address2: (empty field)
- City: Sacramento
- State: California (dropdown menu)
- Zip: 93939

At the bottom of the form, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box. A message at the top right of the form states: 'Selected Organization 'West Sacramento' is Registered.'

Below the form, a blue footer bar contains the text: 'For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.'

This will update your organization and division. If you cannot find the organization or division, see the [Add New Organization](#) or [Add New Division](#) sections of this guide.

If you want to add a second organization to your profile without removing yourself from the organization you were initially a member of, please contact the Organization Administrator or GRanTS Admin at (888) 907-4267 or GRanTSadmin@water.ca.gov.

To edit your account information, including your password, select the **Account** workbook tab. Click on the **Save** button when you have finished making changes.

The screenshot shows the 'My Profile' page with the 'Account' tab selected. The 'ACCOUNT DATA' form contains the following fields:

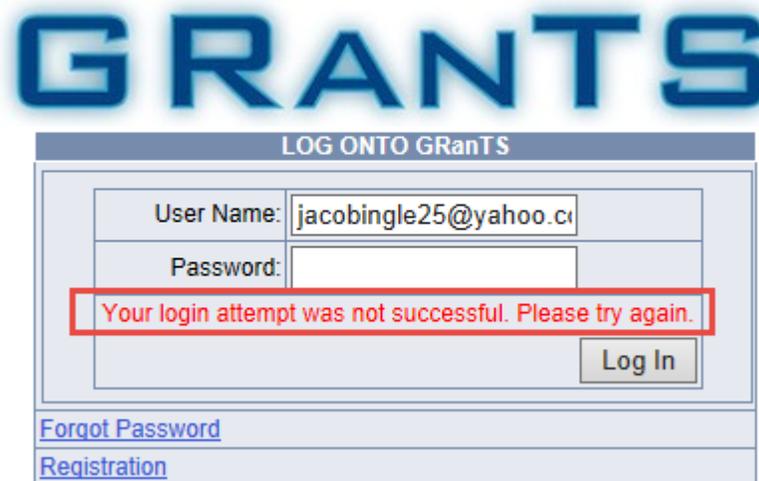
- Username/Email: johnpublic@yahoo.com
- New Password: (empty field)
- Confirm New Password: (empty field)
- Security Question 1: What is the name of your favorite childhood friend? (dropdown menu) with answer: Stan Lee
- Security Question 2: What was the name of your high school? (dropdown menu) with answer: San Juan

At the bottom of the form, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box.

Below the form, a blue footer bar contains the text: 'For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.'

V. Forgotten Password

You have only 5 attempts to enter your password. If you enter a wrong password, “Your login attempt was not successful. Please try again” message will appear as shown below.



The screenshot shows the GRANTS login interface. At the top is the large blue 'GRANTS' logo. Below it is a box titled 'LOG ONTO GRanTS'. Inside this box, there are two input fields: 'User Name:' with the value 'jacobingle25@yahoo.c' and 'Password:'. Below the password field, a red-bordered box contains the message: 'Your login attempt was not successful. Please try again.' To the right of this message is a 'Log In' button. Below the main login box are two links: 'Forgot Password' and 'Registration'.

If you are unable to correctly enter the password in five attempts, you will be locked out of the account for security purposes. Contact the Organization Administrator, or the GRANTS Admin at (888) 907-4267 or GRANTSadmin@water.ca.gov to unlock and reactivate your account.



The screenshot shows the GRANTS login interface. At the top is the large blue 'GRANTS' logo. Below it is a box titled 'LOG ONTO GRanTS'. Inside this box, there are two input fields: 'User Name:' with the value 'jacobingle25@yahoo.c' and 'Password:'. Below the password field, a red-bordered box contains the message: 'Your account is locked. Please contact the System Admin.' To the right of this message is a 'Log In' button. Below the main login box are two links: 'Forgot Password' and 'Registration'.

To reset a forgotten password, click on the **Forgot Password** link on the GRANTS log in page.

GRANTS

LOG ONTO GRanTS

User Name:

Password:

Log In

[Forgot Password](#)

[Registration](#)

The **Forgot Password** page will be displayed. On the **Forgot Password** page, enter the Username/Registered email address of the Public User whose account password is to be reset then click on the **Validate User ID** button.

Forgot Password

Username/Registered email:

The two security questions defined during the User Registration process and associated with the user account will be displayed.

Note: You have only three attempts to reset your password. If you are unable to correctly answer the security questions in three attempts, you will be prevented from further attempts for security purposes. Contact the Organization Administrator or the GRANTS Admin at (888) 907-4267 or GRanTSAdmin@water.ca.gov to reset your password.

After providing the correct answers to both Security Questions, click on the **Submit** button.

Forgot Password

Username/Registered email:

Please answer the following security questions.

What was your childhood nickname?

What was the name of your high school?

You have maximum of 3 unsuccessful attempts.

If answered the security questions correctly then you will see a notification at the bottom of the screen that says, “A temporary password was sent to your email account.”

Forgot Password

Username/Registered email:

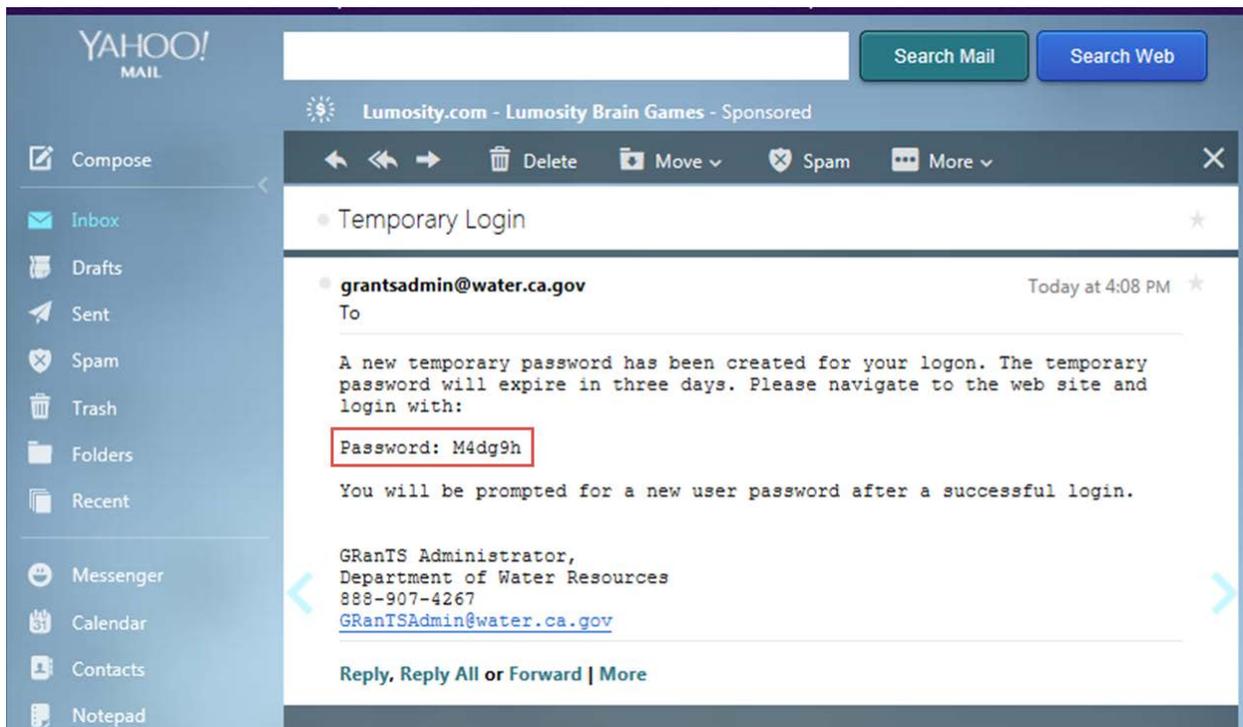
Please answer the following security questions.

What was your childhood nickname?

What was the name of your high school?

A temporary password was sent to your email account.

An email containing the temporary password and instructions on how to reset the account’s password will be sent to your email address.



Log in again using the valid username and the new (temporary) password that was sent to your email account and the **Change Password** page will be displayed.

Change Password	
Current Password:	<input type="text"/>
New Password:	<input type="text"/>
Confirm New Password:	<input type="text"/>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

Use the **Change Password** page to reset the account password. After entering the needed information in the proper fields, click on the **Submit** button.

Change Password	
Current Password:	<input type="password" value="••••••"/>
New Password:	<input type="password" value="••••••••••"/>
Confirm New Password:	<input type="password" value="••••••••••"/>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

IV. Organizations

If you share a Tax Identification Number (TIN) with a higher level organization (ie., *Plumas County Water and Power Agency* and *Plumas, County of*) be sure to register the higher level organization (*Plumas, County of*) and create the lower level organization (*Plumas County Water and Power Agency*) as a division of that organization. Failure to do so can result in multiple divisions of a county or city trying to use the same TIN. The TIN must be unique to an organization.

A. Searching for an Organization

It is important to search and find your organization if it has already been entered into GRANTS. There are several reasons your organization might already be entered and they include the following:

- Your organization had a contract with DWR previously
- Someone else from a different division or location entered the organization
- The naming convention differs from another entry, i.e.
 - City of Sacramento
 - Sacramento, City of
 - Sacramento Dept. of Parks and Rec.

Please search thoroughly for your organization before clicking on the **Add New** hyperlink. Your organization is the primary entity that will contract with DWR. Each sub-department or division should select the higher organization from the drop-down menu and either select their division or add a new division to that organization.

To search for an organization, the basic steps are:

1. Select an existing Organization name from the **Organization** dropdown field. You can start typing the name of your organization in this field to narrow the list to show matching organization names.

The screenshot shows the 'User Profile' form with the 'Organization' tab selected. The 'Organization' dropdown menu is open, displaying a search filter 'West' and a list of matching organizations. The list includes:

- Biggs-West Gridley Water District
- City of West Sacramento
- Friends of Western Canal Water District
- West Basin Municipal Water District
- West Lake Resource Conservation District
- West Sacramento
- West Valley Water District
- West Yost
- Western Canal Water District
- Western Canal Water District

The form also includes fields for 'Address1', 'City', 'Zip', 'Address2', and 'State'. The 'State' dropdown is set to 'California'. There are 'Add New' links for both the 'Organization' and 'Division/Address List' fields. At the bottom of the form, there are 'Next' and 'Cancel' buttons. A footer note reads: 'anTS please call (888) 907-4267 or email GRANTSadmin@water.ca.gov.'

2. Select a Division from the **Division/Address List** dropdown field.

User Profile

Contact Organization Account

Selected Organization 'West Sacramento' is Registered.

Organization:	West Sacramento	* Add New	Division/Address List:	Search for Branch...	* Add New
Address1:		*	Address2:	Select Division	*
City:		*	State:	Division 1 : 383838,Sacramento	*
Zip:		*		Division 45 : asdfasdfasdf,sdfasdf	
				Sac. Desalination Program : 245 W. Palmer Street,Sacramento	
				Division 3 : 344334,Sacramento	
				Division 2 : 93234,Sacramento	

Next Cancel

3. Values for the **Address, City, State, Zip, Phone,** and **Website** fields for the selected Organization and Division will be auto-populated by the system once a Division has been selected from the dropdown menu.

User Profile

Contact Organization Account

Selected Organization 'West Sacramento' is Registered.

Organization:	West Sacramento	* Add New	Division/Address List:	Division 1 : 383838,Sacramento	* Add New
Address1:	383838	*	Address2:		
City:	Sacramento	*	State:	California	*
Zip:	93939	*			

Next Cancel

B. Creating a New Organization

To enter a new organization name (one that does not exist in GRANTS) follow these steps:



If you share a Tax Identification Number (TIN) with a higher level organization (i.e., *Plumas County Water and Power Agency and Plumas, County of*) be sure to register the higher level organization (*Plumas, County of*) and create the lower level organization (*Plumas County Water and Power Agency*) as a division of that organization. Failure to do so can result in multiple divisions of a county or city trying to use the same TIN. The TIN must be unique to an organization.

Click the **Add New** hyperlink next to the **Organization** dropdown menu.

User Profile

Contact Organization Account

Organization:	Search for Organization... Add New	Division/Address List:	Search for Division... Add New
Address1:	<input type="text"/>	Address2:	<input type="text"/>
City:	<input type="text"/>	State:	California <input type="text"/>
Zip:	<input type="text"/>		

Next Cancel

Enter the address and contact information. Click on the **Save** button to save the information you entered. You will then be returned to the **Organization** screen.

Add New Organization

Organization:	New Organization *	Division:	Division A *
Address1:	123 A Street *	Address2:	<input type="text"/>
City:	Sacramento *	State:	California <input type="text"/>
Zip:	95781 *		

Save Cancel

C. Adding a new Division

After searching for and finding your organization, select the drop-down arrow to choose your division and/or address location. If an entry in the **Division/Address** field is not found, it is necessary to add a new one. To create a new division, click on the **Add New** hyperlink.

User Profile

Contact Organization Account

Selected Organization 'New Organization' is Registered.

Organization:	New Organization <input type="text"/> Add New	Division/Address List:	Search for Branch... Add New
Address1:	<input type="text"/>	Address2:	<input type="text"/>
City:	<input type="text"/>	State:	California <input type="text"/>
Zip:	<input type="text"/>		

Next Cancel

Enter the new division name (i.e. Sac. Desalination Program), address, city, state and phone information on the **Add New Division** page. Click on the **Save** button to save the information you entered.

The screenshot shows the 'Add New Division' form with the following fields and values:

Organization Name:	New Organization CA	Division Name:	Division B
Address1:	123 B Street	Address2:	
City:	Sacramento	State:	California
Zip:	95814		

At the bottom of the form, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a red rectangle.

A confirmation screen will appear once the information has successfully saved. Click on the **OK** button and you will be returned to the **Organization** screen.

The screenshot shows the 'Add New Division' form with a confirmation dialog box overlaid in the center. The dialog box contains the following text:

Division B has been successfully added to New Organization CA.

At the bottom of the dialog box, there is an 'OK' button highlighted with a red rectangle. The background form is dimmed, showing the same fields as in the previous screenshot.

Now you will be able to find both your organization and your division in their respective dropdown menus. Once you have selected both your Organization and your Division click on the **Next** button to continue on to the **Account** tab.

User Profile

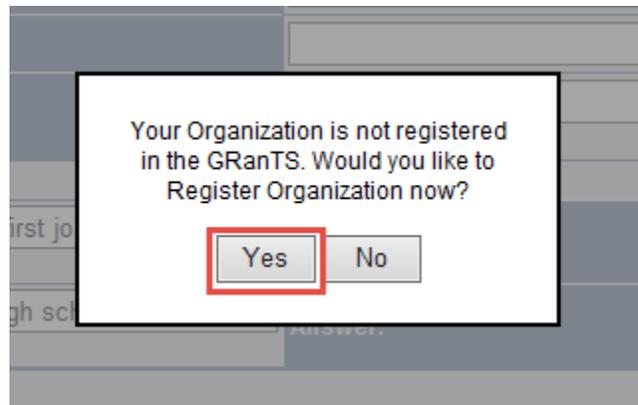
Selected Organization 'New Organization CA' is not Registered.

Organization:	New Organization CA	* Add New	Division/Address List:	Division B : 123 B Street,Sacrame	* Add New
Address 1:	123 B Street	*	Address 2:		
City:	Sacramento	*	State:	California	*
Zip:	95814	*			

D. Registering an Organization

Organization Registration enables a user to register an organization in GRANTS by providing the Tax Identification Number (TIN) associated with that organization. This process is required for organizations applying for grant funds through DWR. If your organization is not registered, the system will prompt you to register at the end of the user registration process. Only the Organization Administrator may register your organization at a later date.

If you register your organization during the user registration process, click on the **Yes** button when asked if you would like to register your organization.

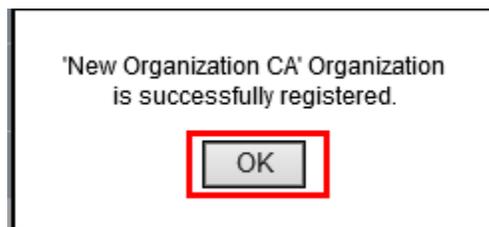


You will then be redirected to the **Register Organization** page.

Register Organization	
Organization Name:	New Organization CA
Organization Nick Name:	<input type="text"/>
Tax ID:	<input type="text"/> *
Administrator's Email:	<input type="text"/> x *
<input type="button" value="Register"/> <input type="button" value="Cancel"/>	

Enter the **Organization Nick Name** (not required), **Tax ID**, and **Administrator's Email**. Since you are the first user to register for your organization, you will be the Organization Administrator. Click the **Register** button, and then click **OK**.

Register Organization	
Organization Name:	New Organization CA
Organization Nick Name:	<input type="text"/>
Tax ID:	199543543 *
Administrator's Email:	h.grants10@gmail.com x *
<input type="button" value="Register"/> <input type="button" value="Cancel"/>	



VII. Organization Administrator

The GRANTS **Home** page for an Organization Administrator includes an additional tab for **Organization Admin**:



In addition to all of the functions that a general public user can perform, the Organization Administrator can also:

- Change organization name or tax ID information
- Register an organization
- Add or remove public users to and from an organization
- Change permissions for authorized public users of an organization
- Unlock a public user’s GRANTS account

The procedure and steps associated with each operation of Organization Administration are discussed in the following section.



A public user must ask the Organization Administrator for permission to access projects, contracts, and PSPs on behalf of the organization. Once registered in GRANTS under an organization, the user will send an email to or call the Organization’s Administrator to ask permission for access.

A. Changing your Organization’s name or Tax ID

Click on the **User Mgmt** submodule under the **Organization Admin** tab.



The **Organization Admin** page is displayed. Select an organization from the **Select Organization** dropdown menu.



Details about the selected organization can be changed by selecting **Edit**. The entries in the **Organization Name** and **Tax ID** fields can be corrected from this screen. When your organization is saved with a Tax ID, all authorized users in your organization can apply for Proposal Solicitation Packages. Once you have finished editing your organization click the **Save** button to apply the changes.

Organization Admin

Select Organization: West Sacramento

Organization Name: West Sacramento *

Tax ID: 565487985 *

Buttons: Save, Edit, Cancel

Users

[Add New](#)

User ID	Action
ingle@yahoo.com	
iohnpublic@yahoo.com	

B. Add or Remove Public Users from your Organization

Click on the **Organization Admin** tab on the **Home** page. On the **Organization Admin** page, select an organization from the **Select Organization** dropdown menu.

Organization Admin

Select Organization: Please Select

Organization Name: Please Select *

Tax ID:

Users

[Add New](#)

Dropdown menu items: West Sacramento, Jacob's Organization, Alameda Point Collaborative, City of San Diego - Public Utilities Department, City of Solitude, West Sacramento

Once an organization is selected, a list of users that are registered with that organization will be displayed. To remove a user from your organization, click on the trash can icon to the right of their email address.

Organization Admin

Select Organization: West Sacramento

Organization Name: West Sacramento *

Tax ID: 565487985 *

Save Edit Cancel

Users

[Add New](#)

User ID	Action
inql@yaho.com	
johnpublic@yaho.com	

To add a new user to your organization, click on the **Add New** hyperlink.

Organization Admin

Select Organization: West Sacramento

Organization Name: West Sacramento *

Tax ID: 565487985 *

Save Edit Cancel

Users

[Add New](#)

User ID	Action
inql@yaho.com	
johnpublic@yaho.com	

The **Add/Modify User** screen will be displayed. Type the email address of the registered user you want to add to your organization in the **User ID** box. Only users that have registered in GRANTS can be added to your organization. Click on the **Save** button to save the information you have entered.

Add/Modify User

User ID:

Lock/Unlock

Organization Admin

Authorized User

Save Cancel

If you wish to give the user access to your organization’s projects, contracts, etc., see section: [Authorize Permissions for Public Users of your Organization](#). Without additional permission, they will only see when PSPs become available and your contact information.

C. Authorize Permissions for Public Users of your Organization

Click on the hyperlinked email of a registered public user on the **Organization Admin** page.

Organization Admin

Select Organization	West Sacramento
Organization Name:	West Sacramento *
Tax ID:	565487985 *
<input type="button" value="Save"/> <input type="button" value="Edit"/> <input type="button" value="Cancel"/>	

Users

[Add New](#)

User ID	Action
ingle@yahoo.com	
johnpublic@yahoo.com	

On the **Add/Modify User** page, the Organization Administrator can grant and revoke permissions for different users within their organization. Check the **Authorized User** checkbox to grant the selected public user access to your proposals, contracts, and projects. Check the **Authorized User** and **Organization Admin** checkboxes to grant the selected public user access to the Organization Admin tools as well as the proposals, contracts, and projects.

Add/Modify User

User ID	ingle@yahoo.com
Lock/Unlock	<input type="checkbox"/>
Organization Admin	<input checked="" type="checkbox"/>
Authorized User	<input checked="" type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

If a user has forgotten their password, the lock/unlock box will be checked. Uncheck the box to allow the user access to the system again.



Take caution do not to check the **LOCK** box for a public user. The lock-out function will disable the user’s access to the entire GRANTS system. If you intend to remove a user from your organization you can uncheck the **Authorized User** box or delete the public user from your organization.

VIII. Preparing Proposal Solicitation Packages

Proposal Solicitation Packages (PSPs) can be released to the public through the GRANTS. PSPs can also be called RFPs (Requests for Proposals). The online application process enables DWR to capture electronic proposal data and review these proposals online.

On the **PSPs** tab, the following three submenus will be visible:

- All PSPs
- My Proposals
- My Communications



If you click on the **All PSPs** submodule, you will be brought to a page that lists the Active and Archived PSPs.

Active PSPs

Program Name	PSP Name	Released On	Due Date	Action	Attachments
Jacobs Test Program	Look for this PSP	05/02/2014	6/18/2015 11:30 PM	Start Proposal	No Attachments
Test-Suresh -2	TestJN520	05/20/2015	6/27/2015 11:30 PM	Start Proposal	Attachments
2014 Test	Jon Nguyen Test2	05/08/2015	7/31/2015 9:30 AM	Start Proposal	Attachments
Delta Water Quality Program	Jon Nguyen	05/07/2015	7/31/2015 11:30 PM	Start Proposal	Attachments
Jacob's Chrome Test Program	Jacob's Chrome Test PSP	07/28/2014	5/6/2016 11:30 PM	Start Proposal	Attachments

1 of 6 Pages >>

Archived PSPs

Archived PSP Name Select Fiscal Year Select the Year

Click on the **Start Proposal** hyperlink on this page to begin a proposal.

Active PSPs

Program Name	PSP Name	Released On	Due Date	Action	Attachments
Jacobs Test Program	Look for this PSP	05/02/2014	6/18/2015 11:30 PM	Start Proposal	No Attachments
Test-Suresh -2	TestJN520	05/20/2015	6/27/2015 11:30 PM	Start Proposal	Attachments
2014 Test	Jon Nguyen Test2	05/08/2015	7/31/2015 9:30 AM	Start Proposal	Attachments
Delta Water Quality Program	Jon Nguyen	05/07/2015	7/31/2015 11:30 PM	Start Proposal	Attachments
Jacob's Chrome Test Program	Jacob's Chrome Test PSP	07/28/2014	5/6/2016 11:30 PM	Start Proposal	Attachments

1 of 6 Pages >>

Archived PSPs

Archived PSP Name Select Fiscal Year Select the Year

A. Starting a Proposal

Department of Water Resources has many programs that administer Proposal Solicitation Packages. In order to find specific information about the questions in the PSP, navigate to the [Financial Assistance](#) webpage and look for the program link. An explanation about the application process can be found in program guidelines and the proposal solicitation package found on their websites.

The proposal form will look similar to this:

Applicant Info
Projects
Attachments
Full View

Applicant Information

APPLICANT INFORMATION

Organization Name	Please Select *		
Tax ID			
Point Of Contact*	<input type="radio"/> Existing Registered Users <input type="radio"/> Add New User		
Point Of Contact Position Title*			
Proposal Name	* Maximum Character Limit: 150		
Proposal Objective	* Maximum Character Limit: 2000		

BUDGET

Other Contribution	
Local Contribution	
Federal Contribution	
Inkind Contribution	
Amount Requested	*
Total Project Cost	*

GEOGRAPHIC INFORMATION

Latitude *	DD(+/-)	MM 0	SS 0			
Longitude *	DD(+/-)	MM 0	SS 0			
Longitude/Latitude Clarification	Limit: 250		Maximum Character	Location	Limit: 100	Maximum Character
County				Alameda Alpine Amador Butte		*
Ground Water Basin Help				Acton Valley Adobe Lake Valley Alexander Valley-Alexander Alexander Valley-Cloverdale		
Hydrologic Region Help				Central Coast Colorado River North Coast North Lahontan		
Watershed Help	Limit: 250		Maximum Character			

LEGISLATIVE INFORMATION

Assembly District Help	10th Assembly District 11th Assembly District 12th Assembly District 13th Assembly District
Senate District Help	10th Senate District 11th Senate District 12th Senate District 13th Senate District
US Congressional District Help	District 1 (CA) District 10 (CA) District 11 (CA) District 12 (CA)

Save
Back
Submit



Click on the **Save** button after entering information on each page before continuing. Click on the other sections to navigate to them and enter details.



If you receive an error on the Applicant Information page noting that you are not authorized to create a proposal, double check that your organization has been registered and that your account has been authorized by your Organization Administrator. Instructions for these steps can be found in the Authorize a User and Organization Registration sections of this guide.

B. Uploading Proposal Attachments

The following instructions will help you upload attachments to a proposal in GRANTS. Once the required fields in the Applicant Info tab are filled out, you can navigate to the other tabs in the proposal. Every PSP will have different questions so the tabs will not always look the same. In order to upload an attachment for this sample proposal, click on the Application Attachments tab.

The screenshot shows the 'Application Attachments' tab selected in a navigation bar. Below it is the 'Applicant Information' form. The form includes the following fields and values:

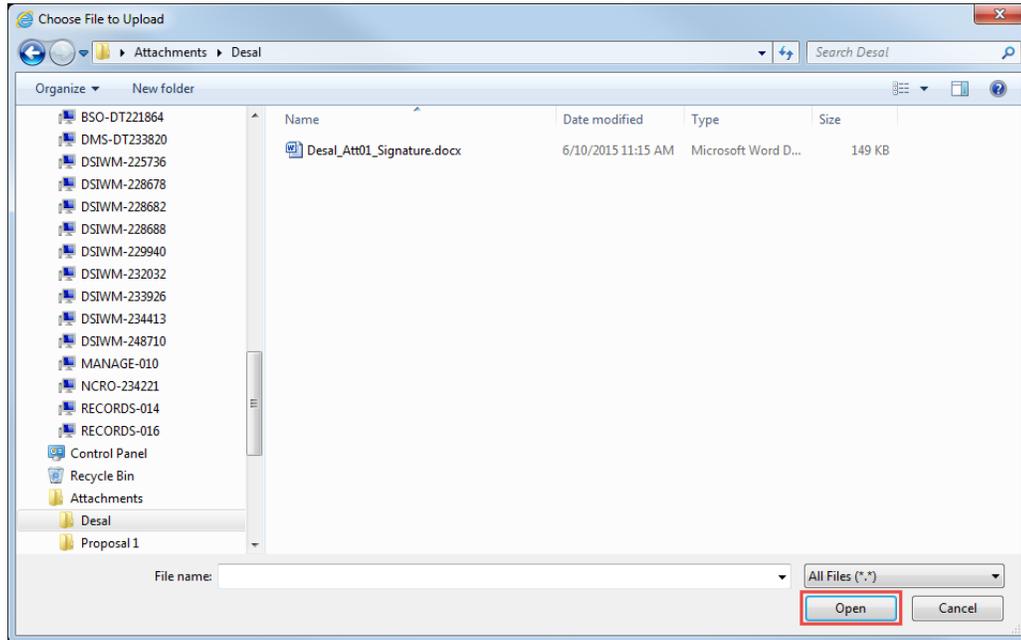
- Organization Name: West Sacramento
- Tax ID: 565487985
- Point Of Contact: Existing Registered Users (selected), Jacob(external) Ingle
- Division/Address List: Division 3
- Address 1: 344334, Address 2: (empty)
- City: Sacramento, State: CA
- Zip: 33434
- First Name: Jacob(external), Last Name: Ingle
- Email: jacobingle25@yahoo.com, Phone (Direct): (916) 6519619
- Point Of Contact Position Title: POC
- Proposal Name: Proposal 1 (Maximum Character Limit: 150)
- Proposal Objective: test (Maximum Character Limit: 2000)

Click on the **Select** button to choose which file you wish to upload. To upload more than one file, click the **Add** button and another upload slot will appear. There is a maximum of 5 upload slots per question.

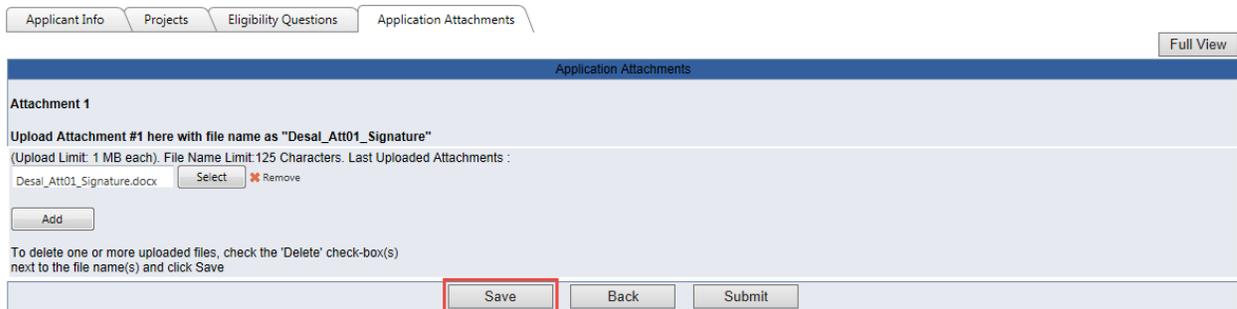
The screenshot shows the 'Application Attachments' section with the following details:

- Attachment 1
- Upload Attachment #1 here with file name as "Desal_Att01_Signature"
- (Upload Limit: 1 MB each). File Name Limit: 125 Characters. Last Uploaded Attachments :
- A text input field with a **Select** button and a **Remove** button.
- An **Add** button (highlighted with a red box).
- Instructions: To delete one or more uploaded files, check the 'Delete' check-box(s) next to the file name(s) and click Save
- Buttons at the bottom: **Save**, **Back**, **Submit**

Browse through your computer for the file you want to upload. Select the file (restricted to one file per upload slot) and click on the **Open** button.



Repeat the previous steps for all of the attachments you wish to upload to the displayed page then scroll to the bottom of the page and click on the **Save** button.



Uploading large amounts of data online may take some time. Be sure to wait for confirmation before performing any other actions in GRANTS.

You can navigate to **My Proposals** under the **PSP** tab and select the **Attachments** link to view all of the attachments that you have uploaded for a given proposal.

My Proposals

Proposal Title	PSP Name	Organization Name	Due Date	Last Updated By	Last Updated On	Status	Attachments	Action
Proposal 2	Review Setup Test 1	West Sacramento	03/30/2018	jingle	06/17/2015	Reviewed	Attachments	Submit
Proposal 1	Test LLAP PSP	West Sacramento	12/28/2018	jingle	06/17/2015	Submitted	Attachments	Submit
asdf	Chrome Test PSP MR 10	West Sacramento	07/05/2019	jacobingle25@yahoo.com	05/20/2015	Draft	Attachments	Submit
This Proposal has an Attachment	Non-Mandatory Attachments	West Sacramento	09/20/2019	jacobingle25@yahoo.com	06/17/2015	Submitted	Attachments	Submit
This Proposal does not have an Attachment	Non-Mandatory Attachments	West Sacramento	09/20/2019	jacobingle25@yahoo.com	06/17/2015	Draft	Attachments	Submit

1 of 4 Pages >>

My Archived Proposals

Proposal Title Select Organization Search

This shows you a full list of your proposal attachments from all sections of the application. We recommend you open the attached files to ensure they are the correct version if you have uploaded revisions several times.

[Download All Attachments](#)

Attachments

Proposal Title:

File Name	File Desc	Author	Delete
Desal Att01 Signature.docx	Attachment 1	Jacob(external) Ingle	
3.docx	Attachment 1	Jacob(external) Ingle	

[Cancel](#)

C. Submitting Proposals

A proposal can be submitted any number of times until the deadline for the PSP. If you submit a proposal and later wish to make changes to the proposal simply open the proposal, make the changes, and click on the **Submit** button again. Clicking the **Submit** button on one section submits all sections of the proposal.

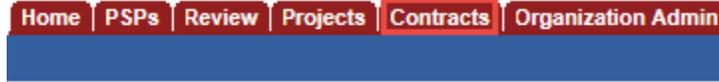
LEGISLATIVE INFORMATION	
Assembly District Help	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #0070c0; color: white; padding: 2px;">10th Assembly District</div> <div style="padding: 2px;">11th Assembly District</div> <div style="padding: 2px;">12th Assembly District</div> <div style="padding: 2px;">13th Assembly District</div> </div>
Senate District Help	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #0070c0; color: white; padding: 2px;">10th Senate District</div> <div style="padding: 2px;">11th Senate District</div> <div style="background-color: #0070c0; color: white; padding: 2px;">12th Senate District</div> <div style="padding: 2px;">13th Senate District</div> </div>
US Congressional District Help	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="padding: 2px;">District 1 (CA)</div> <div style="background-color: #0070c0; color: white; padding: 2px;">District 10 (CA)</div> <div style="padding: 2px;">District 11 (CA)</div> <div style="padding: 2px;">District 12 (CA)</div> </div>

Your proposals will be saved under the **My Proposals** submenu item under the **PSP** tab.



IX. Viewing Contracts

Click on the **Contracts** tab on the **Home** page.



The **My Contracts** page will be displayed showing all of the Contracts that you have been assigned to as a part of the contract team. Select **View All Contracts** and then click the **Filter** button. This will allow you to see all of the contracts whose status is not 'Active'. You can also filter by Program and Year by using the dropdown menus at the top of the page.

My Contract List

[Export Data](#)

Select Program:	(All Programs)	Select Year:	(All Years)
<input checked="" type="checkbox"/> View All Contracts <input type="button" value="Filter"/>			

Program Name	Fiscal Year	Contract Number	Contract Name	Organization Name	Contract Amount	Award Amount	Last Update	Status
Aeoperingf	2014	0000022200054	New Contract May 29	This is Jacob's Organization	\$22,548,778.00	\$0.00	12/22/2014	Active
Jacobs Test Program	1995	053020140953	Another Contract with an Invoice	This is Jacob's Organization	\$1,000,000,000.00	\$0.00	01/23/2015	Active
Jacobs Test Program	2014	082719922014	Test this Contract JTI 2014	This is Jacob's Organization	\$0.00	\$0.00	08/26/2014	Active
Jacobs Test Program	2014	100200300	Another 2014 Test Contract	City of Oroville	\$4,356.00	\$0.00	03/06/2015	Active
Jacobs Test Program	1995	100200300400	This is a 2014 Test Contract	City of Oroville	\$0.00	\$0.00	04/06/2015	Active
Jacobs Test Program	2014	100200300400500	2014 Test Contract	City of Oroville	\$0.00	\$0.00	06/30/2014	Active
Flood Control Project Subventions Program	2012	123456789	Jacob's Contract	Acme Water Company	\$0.00	\$0.00	08/27/2013	Active
Aeoperingf	2015	1234567890	123	West Sacramento	\$0.00	\$0.00	06/18/2015	Active
Aeoperingf	2015	123456789101112131415	Sprint 3, 4 and 5 Test	RJOrg	\$0.00	\$2.00	03/25/2015	Active
Jacobs Test Program	2015	1555555555555555	Defect 458 Test	West Sacramento	\$0.00	\$0.00	06/15/2015	Active

1 of 2 Pages >>

Click on the hyperlinked **Contract Number** to display the details of the Contract.

The **Contract Overview** workbook will be displayed with the details of your contract with DWR. If you see any errors or items that need to be changed, please contact your DWR contract manager.

Contract Overview | Budget | Amendment | Project | Contract Team | Communication | Attachment | Invoice | Return

Contract Data

Program Name: **Jacobs Test Program**
Contract Name: **Another 2014 Test Contract (100200300)**

Contract Number:	<input type="text" value="100200300"/>	Contract Name:	<input type="text" value="Another 2014 Test Contract"/>
Program:	<input type="text" value="Jacobs Test Program"/>	Fiscal Year:	<input type="text" value="2014"/>
Description:	<input type="text"/>	Organization Name:	<input type="text" value="City of Oroville"/>
DWR Contract Manager:	<input type="text" value="Alfors, Linyu"/>	Contract Status:	<input type="text" value="Active"/>
Start Date:	<input type="text" value="6/30/2014"/>	Organization Mgr:	<input type="text" value="Select Organization contact..."/>
Award Date:	<input type="text" value="- Select a date -"/>	End Date:	<input type="text" value="- Select a date -"/>
Award Type:	<input type="text" value="Select Award Type .."/>	Award Amount:	<input type="text" value="\$0.00"/>
Contract Amount:	<input type="text" value="\$4,356.00"/>	Award Category:	<input type="text" value="-Select Award category-"/>
Retention Percentage:	<input type="text" value="0 %"/>	Retention Cap:	<input type="text" value="\$23,423.00"/>
Current Retention:	<input type="text" value="\$234.00"/>		

X. Viewing Projects

Select the **Projects** tab on the **Home** page.



The **My Projects** page will be displayed. This page shows all of the projects for which you are listed as a part of the project team.

Select Program:	(All Programs)	Select Year:	(AllYears)
Reportable:	- No Selection -	Filter	

My Projects

Project Name↑	Program Name	BMS IO Group Code	Project Status	Project Cost	Start Date	Completion Date
11	Proposition 84 Implementation Grants	BMS00364	Not Started	10000	01/01/0001	01/01/0001
111111111111	2014 Test	BMS00816	Not Started	0	09/09/2014	04/07/2017
Another Test Project MR 10	Jacobs Test Program	BMS00796	Not Started	20	01/01/0001	07/06/2018
Code Test 2013	Agricultural and Urban Water Management Grants	BMS00643	Assignedforreview	1	01/01/0001	01/01/0001
Creek Cleaning	Jacobs Test Program	BMS00871	Awarded	123456	01/01/0001	01/01/0001
Defect 460	Aeoperingf	BMS00861	Preliminary/Planning	0	01/01/0001	01/01/0001
Jacob's Test Project	Aeoperingf	BMS00485	Not Restarted	0	01/01/0001	01/01/0001
rulu	Proposition 84 Implementation Grants	BMS00331	Awarded	13700000	01/01/0001	01/01/0001
Sprint 3, 4 and 5 Test	Aeoperingf	BMS00709	Awarded	11	01/01/0001	01/01/0001
Test Project 38956	Jacobs Test Program	BMS00752	Withdrawn	0	01/01/0001	01/01/0001

1 of 2 Pages >>

In the **Project Overview** workbook you can see the details of your projects under contract with DWR. If you see any errors or items that need to be changed, please contact your DWR project manager.

Project Overview | Location | Budget | Milestone | Task | Benefit | Project Team | Communication | Attachment | Checklist | Contract | Return

Project Data

Program Name: Local Groundwater Assistance Prop 84
Project Name: Yuba County Water Agency Regional Monitoring Well Program - Phase 2 (BMS00239)

Project Name:	Yuba County Water Agency Regional Monitoring Well P	Program:	Local Groundwater Assistance Prop 84
Primary Implementing Organization:	Yuba County Water Agency	Secondary Implementing Organization:	
Project Status:	Project Implementation <input type="checkbox"/> Reportable	I/O Group Code	BMS00239
Project Web Site:		Water Code Citation(URL):	
Approval Date:	- Select a date -	Start Date:	- Select a date -
Scope of Work:		Project Objective:	
Project Cost:	Initial \$249,793.00	Project Cost:	Final \$0.00
End Date:	6/30/2011	End Date:	- Select a date -
Description:	Install four new monitor wells.	Description:	To Be Completed.
Fund Type:	.Select Fund Type..	Project Reference ID:	

Save Cancel

XI. Communications and Attachments

In the Contract, Project, Invoice, and PSP modules you will find communications and attachments tools. These tools have been created as a place to store critical information and documents regarding the Proposal, Contract, Project, or Invoice with which the communication or attachment is associated. All communications and attachments are visible to DWR staff assigned to the Project, Contract, or Proposal. There is an upload feature within the communications tool to provide for attachments as well. In the **PSPs** module, for example, click on the **My Communications** submenu tab and the **My Communications** page will be displayed.

Each entry on this page has the following details: Date, Proposal Name, Organization, Communications, Author, and Attachments. An **Add New** hyperlink is also displayed to add new communications to the **My Communications** page.

The screenshot shows the 'My Communications' page. At the top, there is a navigation menu with tabs for Home, PSPs, Review, Projects, Contracts, and Organization Admin. Below this, there are sub-tabs for All PSPs, My Proposals, and My Communications. The main content area is titled 'My Communications' and includes a search bar with 'Select Organization' and 'Select Proposal' dropdowns, and a 'Search' button. Below the search bar is an 'Add New' link. The main part of the page is a table with the following columns: Date, Proposal Name, Organization, Communications, Author, and Attachments. The table contains 10 rows of data, each representing a communication entry.

Date	Proposal Name	Organization	Communications	Author	Attachments
07/09/2014	Test Technical Proposal	Jacob's Organization	Zip file.	jacobingle25@yahoo.com	Attachments
01/06/2015	Test Technical Proposal	Jacob's Organization	bgffhfg	jacobingle25@yahoo.com	No Attachments
08/15/2014	Test Technical Proposal	Jacob's Organization	No attachment here.	jacobingle25@yahoo.com	No Attachments
08/20/2014	Test Technical Proposal	Jacob's Organization	Notes.	jacobingle25@yahoo.com	Attachments
08/26/2014	Test Technical Proposal	Jacob's Organization	a,sldkfj	jacobingle25@yahoo.com	Attachments
03/04/2015	Test Technical Proposal	Jacob's Organization	hhhhhh	jacobingle25@yahoo.com	No Attachments
08/20/2014	Test Technical Proposal	Jacob's Organization	Spell check.	jacobingle25@yahoo.com	Attachments
08/26/2014	Test Technical Proposal	Jacob's Organization	sgfhdfghsafgj	jacobingle25@yahoo.com	No Attachments
08/26/2014	Test Technical Proposal	Jacob's Organization	sgfhdfghsafgj	jacobingle25@yahoo.com	Attachments

Clicking on the **Add New** hyperlink will bring you to the **New Communication** page.

The screenshot shows the 'New Communication' page. It features several form fields: 'Select Organization' with a search dropdown, 'Select Proposal' with a search dropdown, and 'Select Note Type' with a search dropdown. Below these is a large text area for the 'Communication Note' with a 'Spell Check' button. The 'Attachments' section includes a 'Description' field, a 'File' upload area with a 'Select' button and a 'Remove' button, and 'Add' and 'Delete' buttons. At the bottom, there are 'Save' and 'Cancel' buttons.

XII. Working with Invoices

The **Invoice** tab of the contract workbook enables a public user to:

- Prepare an Invoice for a Contract
- Save an Invoice for completion at a later time
- Submit an Invoice for a Contract
- Add/edit Attachment(s) for an Invoice
- Add/edit Communication Note(s) for an Invoice

The invoice feature in GRANTS allows for task level tracking of Bond expenditures throughout the life of the contract. The following process describes the general use of the system.

Select the **My Contracts** sub-module under the **Contracts** tab.



On the **My Contracts** page, select a program from the **Select Program** dropdown field. Next, select the fiscal year from the **Select Year** dropdown field. To view your organization’s completed or closed out contracts, select the **View All Contracts** option. Click on the **Filter** button once you have made your selections.

My Contract List

[Export Data](#)

Select Program: Select Year:

View All Contracts

Program Name	Fiscal Year	Contract Number	Contract Name	Organization Name	Contract Amount	Award Amount	Last Update	Status
Aeoperingf	2014	0000022200054	New Contract May 29	This is Jacob's Organization	\$22,548,778.00	\$0.00	12/22/2014	Active
Jacobs Test Program	1995	053020140953	Another Contract with an Invoice	This is Jacob's Organization	\$1,000,000,000.00	\$0.00	01/23/2015	Active
Jacobs Test Program	2014	082719922014	Test this Contract JTI 2014	This is Jacob's Organization	\$0.00	\$0.00	08/26/2014	Active
Jacobs Test Program	2014	100200300	Another 2014 Test Contract	City of Oroville	\$4,356.00	\$0.00	03/06/2015	Active
Jacobs Test Program	1995	100200300400	This is a 2014 Test Contract	City of Oroville	\$0.00	\$0.00	04/06/2015	Active
Jacobs Test Program	2014	100200300400500	2014 Test Contract	City of Oroville	\$0.00	\$0.00	06/30/2014	Active
Flood Control Project Subventions Program	2012	123456789	Jacob's Contract	Acme Water Company	\$0.00	\$0.00	08/27/2013	Active
Aeoperingf	2015	1234567890	123	West Sacramento	\$0.00	\$0.00	06/18/2015	Active
Aeoperingf	2015	123456789101112131415	Sprint 3, 4 and 5 Test	RJOrg	\$0.00	\$2.00	03/25/2015	Active
Jacobs Test Program	2015	155555555555555	Defect 458 Test	West Sacramento	\$0.00	\$0.00	06/15/2015	Active

1 of 2 Pages >>

The Active contracts being managed by your agency will be listed on this page. Click on a hyperlinked **Contract Number** to open the details of the selected contract.

My Contract List

[Export Data](#)

Select Program:	Jacobs Test Program	Select Year:	2015
<input type="checkbox"/> View All Contracts <input type="button" value="Filter"/>			

Program Name	Fiscal Year	Contract Number	Contract Name	Organization Name	Contract Amount	Award Amount	Last Update	Status
Aeoperingf	2014	0000022200054	New Contract May 29	This is Jacob's Organization	\$22,548,778.00	\$0.00	12/22/2014	Active
Jacobs Test Program	1995	053020140953	Another Contract with an Invoice	This is Jacob's Organization	\$1,000,000,000.00	\$0.00	01/23/2015	Active
Jacobs Test Program	2014	082719922014	Test this Contract JTI 2014	This is Jacob's Organization	\$0.00	\$0.00	08/26/2014	Active
Jacobs Test Program	2014	100200300	Another 2014 Test Contract	City of Oroville	\$4,356.00	\$0.00	03/06/2015	Active
Jacobs Test Program	1995	100200300400	This is a 2014 Test Contract	City of Oroville	\$0.00	\$0.00	04/06/2015	Active
Jacobs Test Program	2014	100200300400500	2014 Test Contract	City of Oroville	\$0.00	\$0.00	06/30/2014	Active
Flood Control Project Subventions Program	2012	123456789	Jacob's Contract	Acme Water Company	\$0.00	\$0.00	08/27/2013	Active
Aeoperingf	2015	1234567890	123	West Sacramento	\$0.00	\$0.00	06/18/2015	Active
Aeoperingf	2015	123456789101112131415	Sprint 3, 4 and 5 Test	RJOrg	\$0.00	\$2.00	03/25/2015	Active
Jacobs Test Program	2015	155555555555555	Defect 458 Test	West Sacramento	\$0.00	\$0.00	06/15/2015	Active

1 of 2 Pages >>

Now click on the **Invoice** workbook.

Contract Overview | Budget | Amendment | Project | Contract Team | Communication | Attachment | **Invoice** | Return

Contract Data

Program Name: Jacobs Test Program
Contract Name: Another 2014 Test Contract (100200300)

Contract Number:	100200300	Contract Name:	Another 2014 Test Contract
Program:	Jacobs Test Program	Fiscal Year:	2014
Description:		Organization Name:	City of Oroville
DWR Contract Manager:	Alfors, Linyu	Contract Status:	Active
Start Date:	6/30/2014	Organization Mgr:	Select Organization contact...
Award Date:	- Select a date -	End Date:	- Select a date -
Award Type:	Select Award Type ..	Award Amount:	\$0.00
Contract Amount:	\$4,356.00	Award Category:	-Select Award category-
Retention Percentage:	0 %	Retention Cap:	\$23,423.00
Current Retention:	\$234.00		

Save | Cancel | Amend

GRANTS is designed to save the invoice data for both the Grantee and DWR project managers to access. The invoice numbers, creation date, start and end dates, amount, status, and submitted date will all be displayed on the **Invoice List** page.

Contract Overview | Budget | Amendment | Project | Contract Team | Communication | Attachment | **Invoice** | Return

Invoice List

Program Name: Jacobs Test Program
Contract Name: Another 2014 Test Contract (100200300)

[Add New](#)

Number	Date	Start Date	End Date	Amount	Status	Submitted On
Pending	8/4/2014	8/24/2014	8/29/2014	\$0.00	In Preparation	
Pending	8/11/2014	8/18/2014	8/14/2014	\$0.00	In Preparation	
Pending	8/4/2014	8/6/2014	8/22/2014	\$0.00	In Preparation	
3	8/27/2014	8/29/2014	8/28/2014	\$8,576.00	Submitted	3/6/2015
1	6/30/2014	6/30/2014	7/7/2017	\$4,589,966.00	Submitted	6/30/2014
2	7/29/2014	7/29/2014	8/4/2017	\$55.00	Submitted	3/6/2015

To see the details of an Invoice in this list, click on one of the hyperlinks in the **Number** column.

Contract Overview Budget Amendment Project Contract Team Communication Attachment Invoice Return

Invoice List

Program Name: Jacobs Test Program
Contract Name: Another 2014 Test Contract (100200300)

[Add New](#)

Number	Date	Start Date	End Date	Amount	Status	Submitted On
Pending	8/4/2014	8/24/2014	8/29/2014	\$0.00	In Preparation	
Pending	8/11/2014	8/18/2014	8/14/2014	\$0.00	In Preparation	
Pending	8/4/2014	8/6/2014	8/22/2014	\$0.00	In Preparation	
3	8/27/2014	8/29/2014	8/28/2014	\$8,576.00	Submitted	3/6/2015
1	6/30/2014	6/30/2014	7/7/2017	\$4,589,966.00	Submitted	6/30/2014
2	7/29/2014	7/29/2014	8/4/2017	\$55.00	Submitted	3/6/2015

A. Preparing an Invoice for a Contract

To add a new Invoice, click on the **Add New** hyperlink displayed above the Invoice List on the **Invoices** workbook tab.

Contract Overview Budget Amendment Project Contract Team Communication Attachment Invoice Return

Invoice List

Program Name: Jacobs Test Program
Contract Name: Another 2014 Test Contract (100200300)

[Add New](#)

Number	Date	Start Date	End Date	Amount	Status	Submitted On
Pending	8/4/2014	8/24/2014	8/29/2014	\$0.00	In Preparation	
Pending	8/11/2014	8/18/2014	8/14/2014	\$0.00	In Preparation	
Pending	8/4/2014	8/6/2014	8/22/2014	\$0.00	In Preparation	
3	8/27/2014	8/29/2014	8/28/2014	\$8,576.00	Submitted	3/6/2015
1	6/30/2014	6/30/2014	7/7/2017	\$4,589,966.00	Submitted	6/30/2014
2	7/29/2014	7/29/2014	8/4/2017	\$55.00	Submitted	3/6/2015

Complete the **Invoice Date** and **Period** information then click on the **Add New Line Item** hyperlink to begin entering Invoice data.

Invoice Attachments Communications

Invoice

Print Preview Return

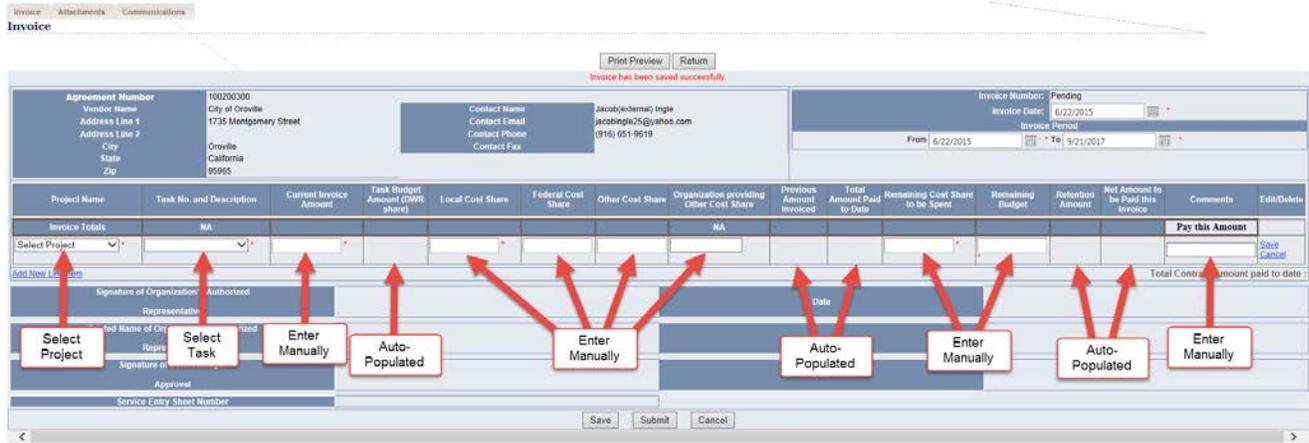
Agreement Number 100200300 Vendor Name City of Oroville Address Line 1 1735 Montgomery Street Address Line 2 City Oroville State California Zip 95965	Contact Name Jacob(external) Ingle Contact Email jacobingle25@yahoo.com Contact Phone (916) 651-9619 Contact Fax	Invoice Number: Invoice Date: <input type="text" value="- Select a date -"/> * Invoice Period From <input type="text" value="- Select a date -"/> * To <input type="text" value="- Select a date -"/> *
--	---	--

[Add New Line Item](#) Total Contract Amount paid to date :

Signature of Organization's Authorized Representative	Date
Printed Name of Organization's Authorized Representative	Title
Signature of DWR Manager Approval	Date
Service Entry Sheet Number	

Save Submit Cancel

The following image shows the fields that auto-populate and those that are calculated manually. Most Programs encourage grantees/contractors to track expenditures by task in a spreadsheet tool. The information provided by this screen is easily transferred into spreadsheet form while the calculations are kept separate.



Select a Project from the **Project Name** dropdown list of Projects associated with the Contract and the **Task No. and Description** dropdown menu will be populated with Tasks associated with that Project.

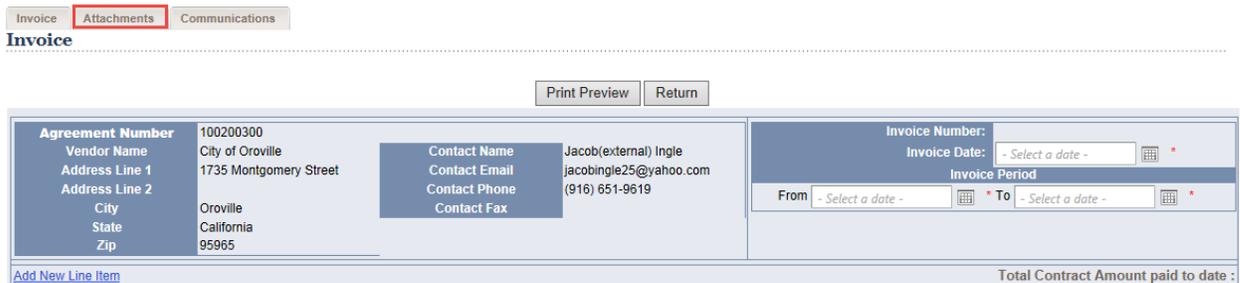
Select a **Task** from the **Task No. and Description** dropdown menu. Specify values for the following fields:

- Current Invoice Amount
- Local Cost Share
- Federal Cost Share
- Other Cost Share
- Org providing Other Cost Share
- Remaining Cost Share to be Spent
- Remaining Budget
- Comments

Repeat the steps above, as necessary, to complete the invoice. When you are finished, click on the **Save** button displayed at the bottom of the page then click on the **Return** button to return to the **Invoice List** page.

B. Invoice Attachments

The attachment feature in the invoice module enables you to upload supporting documentation for invoices into GRANTS. Click on the **Attachments** tab for a selected invoice to begin.



Click on the **Add New** hyperlink to upload a new attachment.

The screenshot shows the 'Invoice Attachment List' interface. At the top, there are tabs for 'Invoice', 'Attachments', and 'Communications'. Below the tabs, the title 'Invoice Attachment List' is displayed. There are two input fields: 'Author:' with a dropdown menu set to '- Select Author -' and 'File Name:' with an empty text box. A 'Filter' button is located below these fields. A blue 'Add New' button is highlighted with a red box. Below the button, a table header is visible with the text 'No Records Found'.

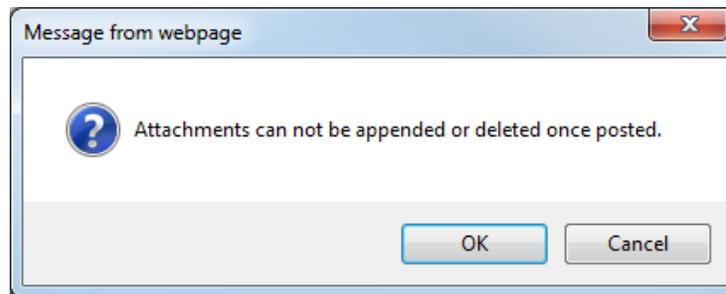
Be sure to provide a description and indicate if you want this attachment shared with others on the project team by checking the appropriate box. Click on the **Save** button once you are finished.

The screenshot shows the 'ADD ATTACHMENT' dialog box. It has a title bar with 'ADD ATTACHMENT'. The dialog contains a 'Description' text box and an 'Attachment #1' text box. Below these is a checkbox labeled 'Check this box if you want the attachment to be private.' with an unchecked box. There is a file list showing '1.docx' with 'Select' and 'Remove' buttons. At the bottom, there are 'Add' and 'Delete' buttons, and a 'No uploaded files' message. The 'Save' button is highlighted with a red box.



If you decide to make your attachment private then only DWR staff will be able to view the attachment. However, if you do not make the attachment private then everyone on your contract team will be able to see the attachment.

Once saved, attachments cannot be deleted or edited. Click the **OK** button when you see this message.



Now you will see a message that says, "Email sent to DWR Managers successfully."

Invoice Attachments Communications

Invoice Attachment List

Author: File Name:

[Add New](#)

No Records Found

Email sent to DWR Managers successfully.

Refresh the page to verify that your attachment has been uploaded.

Invoice Attachments Communications

Invoice Attachment List

Author: File Name:

[Add New](#)

File Name	Description	Type	Author	Date of Upload	Last Modified By	Last Modified Date
1.docx	Attachment #1	docx	Jacob(external) Ingle	6/22/2015 9:29:11 AM	Jacob(external) Ingle	6/22/2015 9:29:10 AM

C. Invoice Communications

Click on the **Communications** tab for a selected invoice.

Invoice Attachments **Communications**

Invoice Attachment List

Author: File Name:

[Add New](#)

File Name	Description	Type	Author	Date of Upload	Last Modified By	Last Modified Date
1.docx	Attachment #1	docx	Jacob(external) Ingle	6/22/2015 9:29:11 AM	Jacob(external) Ingle	6/22/2015 9:29:10 AM

Click on the **Create Note** hyperlink to create a new communication.

Invoice Attachments Communications

Invoice Communication List

[Create Note](#)

No records to Display

A note is used to specify the details of communication entries created on the **Add Communication** page. It is also possible to upload Attachment(s) on this page. Click on the **Save** button when you are finished.

Invoice Attachments Communications

Add Communication

Date of Activity: 06/22/2015

Type: POC Approves Invoice

Notes: Enter your notes here.

Private?: Yes No

Attachments: Description Attachment #1
 File 1.docx Select Remove
 Add Delete
 No uploaded files

Save Cancel

ATTACHMENTS



Regarding the **Private?** checkbox: If you check **Yes**, only DWR staff will be able to view this communication. Checking **No** allows everyone on the contract team to see the note and attachments.

You can now see the communications that you have added on the **Invoice Communication List** page.

Invoice Attachments Communications

Invoice Communication List

[Create Note](#)

Date	Type	Comments	Attachments	Private	Author
6/22/2015	POC Approves Invoice	Enter your notes here.	Included	No	Jacob(external) Ingle

D. Submitting an Invoice

Once finalized, the invoice can be printed, signed, and sent with the documentation required by the funding program. Click on the **Submit** button when the invoice is ready to be reviewed and processed by DWR.

Printed Name of Organization's Authorized Representative	Title
Signature of DWR Manager	Date
Approval	
Service Entry Sheet Number	

Save **Submit** Cancel

Once your invoice has been submitted, the status will update on the Invoice List page. An email will be sent to the DWR Contract Manager to notify them that an invoice has been submitted.