GRANTS

GRANTS REVIEW AND TRACKING SYSTEM

Public User Guide

June 2016
Department of Water Resources
Project Services Office

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Contents

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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.

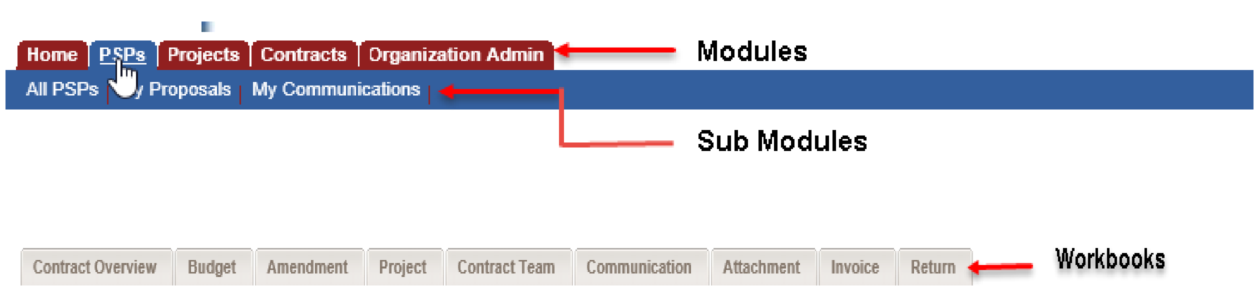
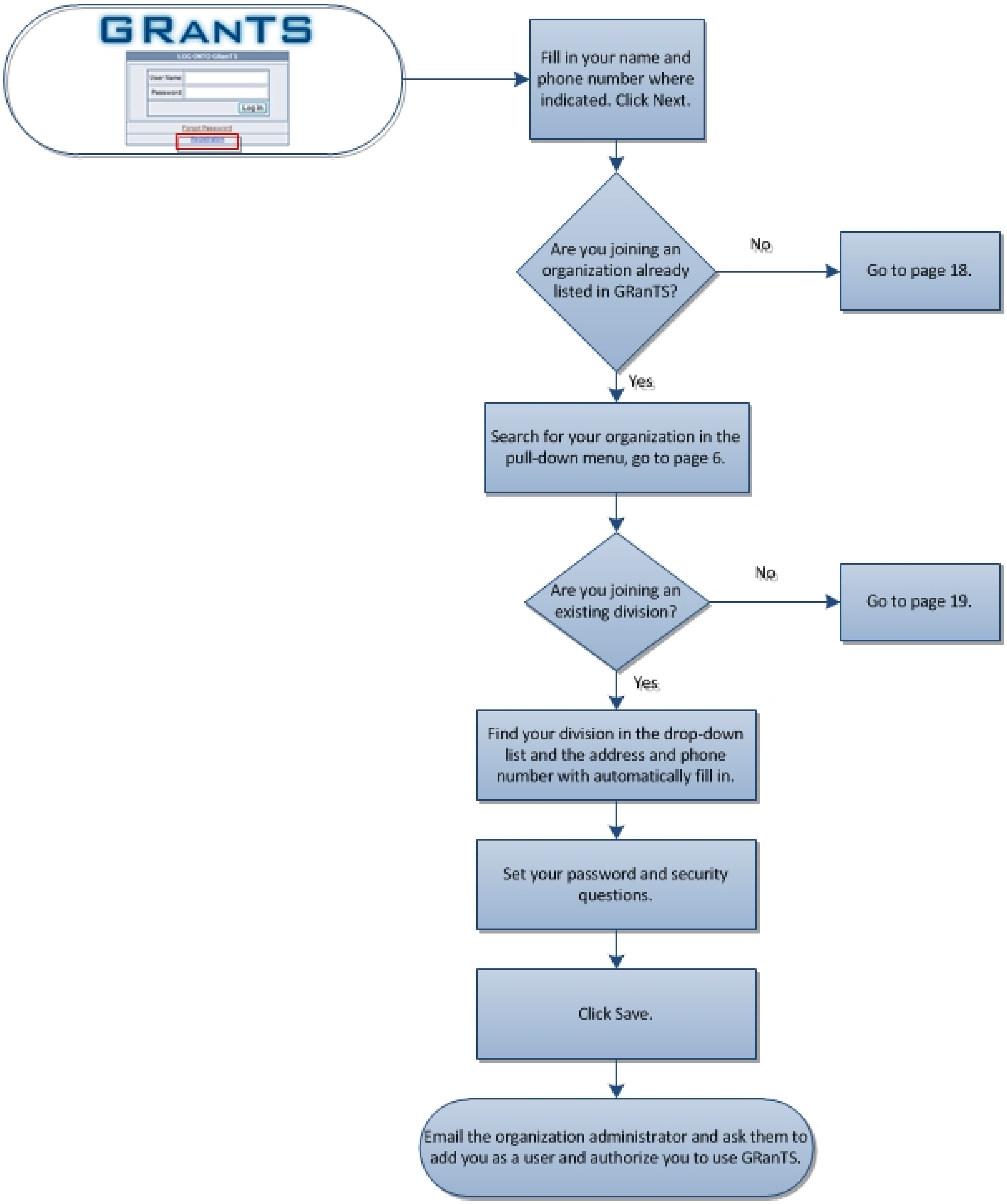


Figure 1: Registering in GRANTS



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:

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.

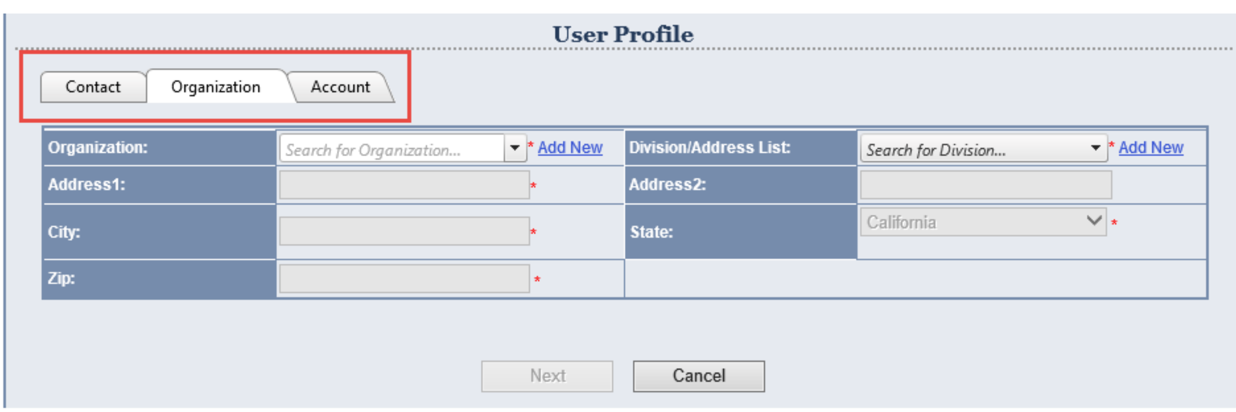
To begin, click on the **Sign In** button near the top of the page.

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:

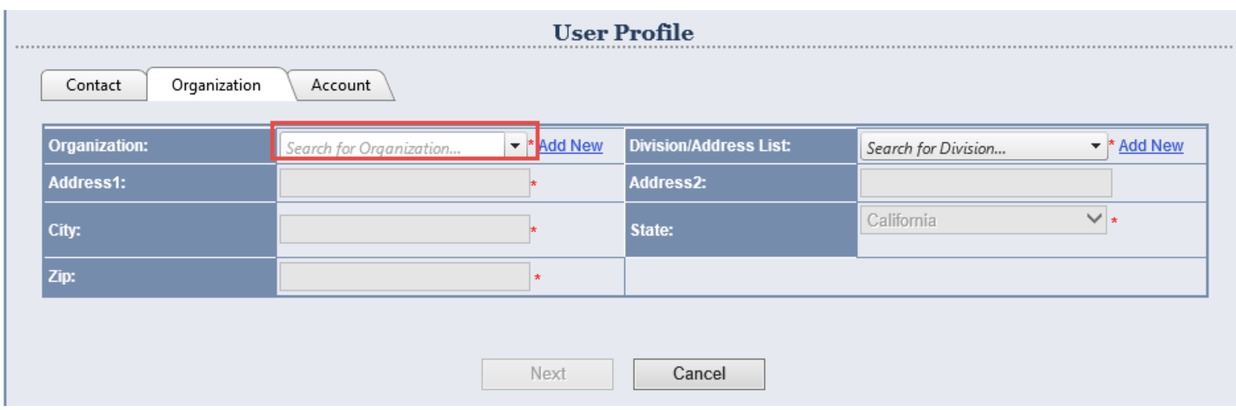
- Contact
- Organization
- Account

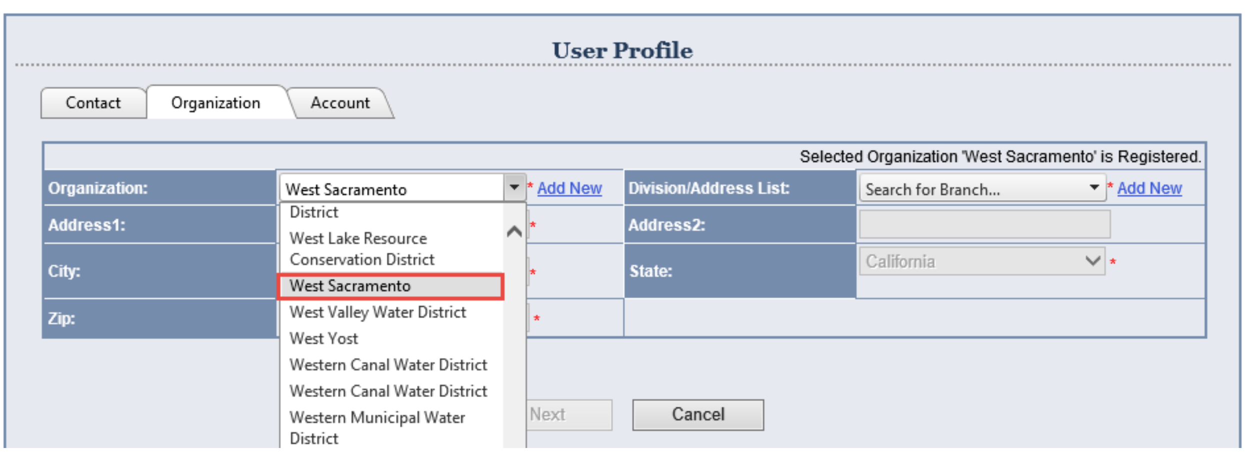


In the **Contact** Tab, fill out your **First** and **Last Name** and **Phone (Office)** information then click on the **Next** button.

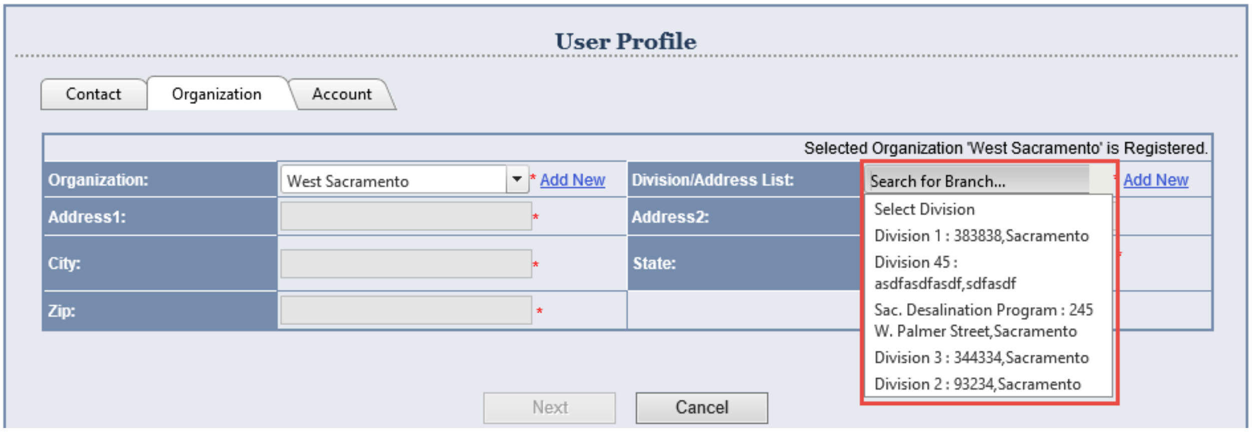
NOTE: The fields marked with a red asterisk (*) are mandatory and must be completed.

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.



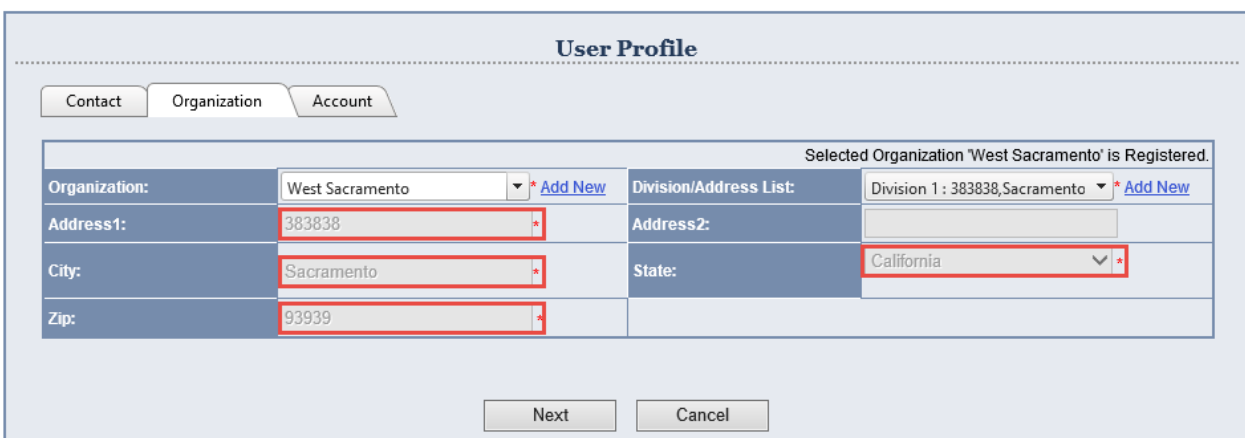


Once you have chosen an organization, select a Division from the **Division/Address List** dropdown field.



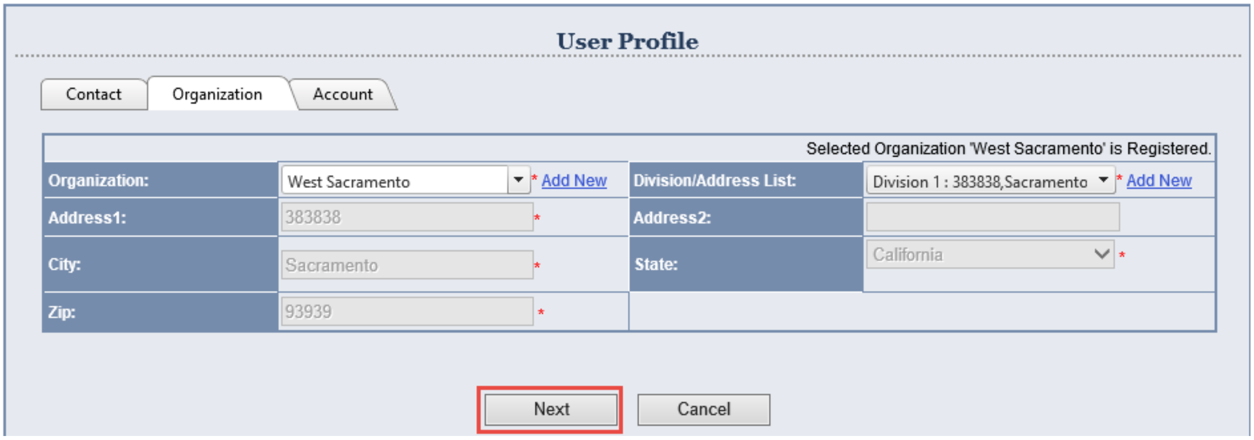
 If you cannot find your **Organization** or **Division**, click on the **Add New** hyperlink located next to the corresponding dropdown menu. For additional details pertaining to adding a new **Organization** or **Division**, click on one of the following links: Click here to add a new Organization and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

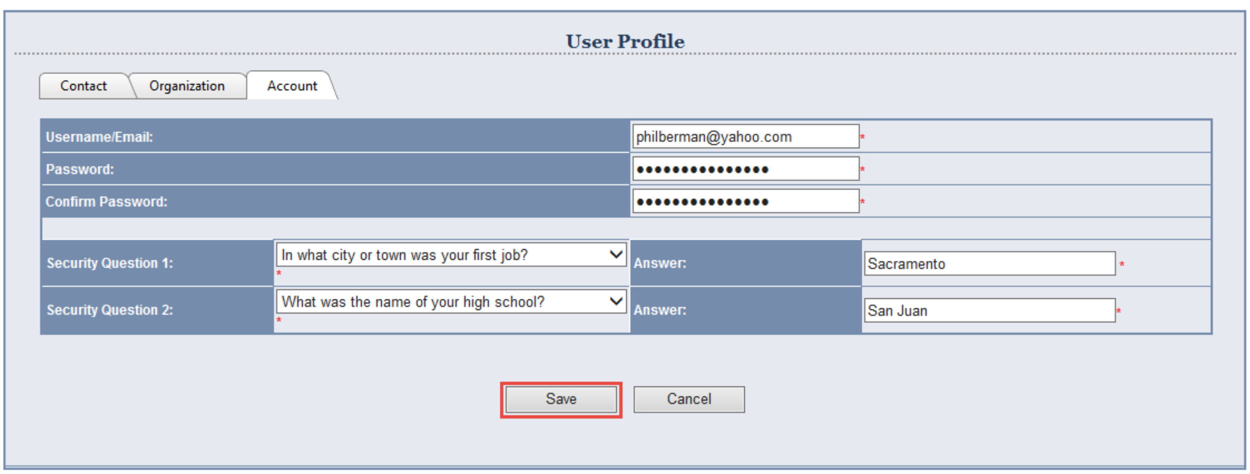
Click on the **Next** button to continue on to the **Account** tab.



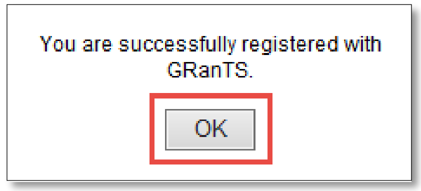
In the **Account** section, you will need to do the following:

- 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.

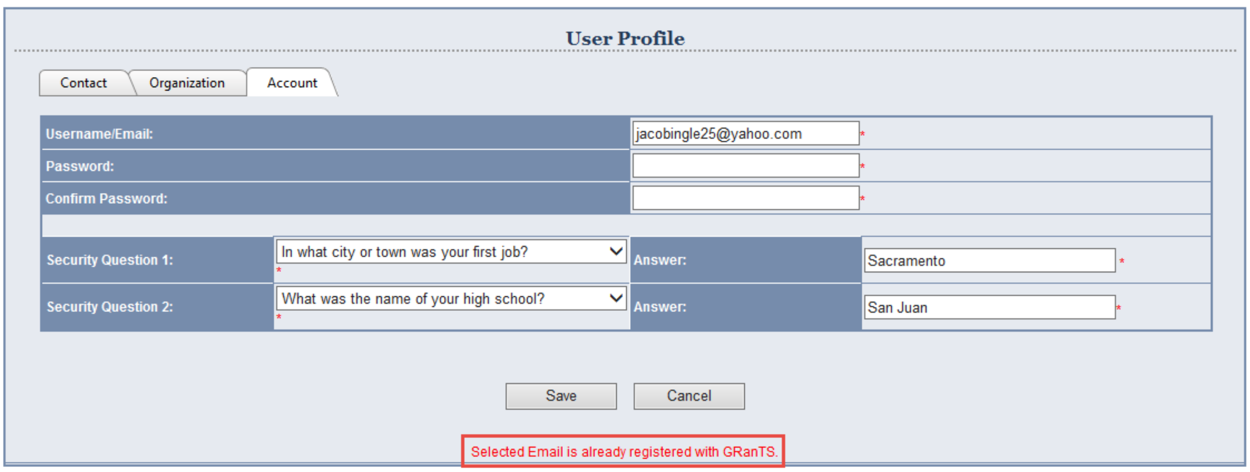
Finally, click on the **Save** button to complete your registration.



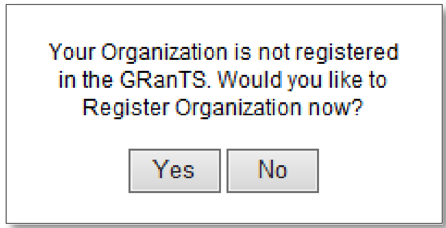
The **User Registration Confirmation** popup window will show that: “You are successfully registered with GRanTS.” Click on the **OK** button to go to your home screen.



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.



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.

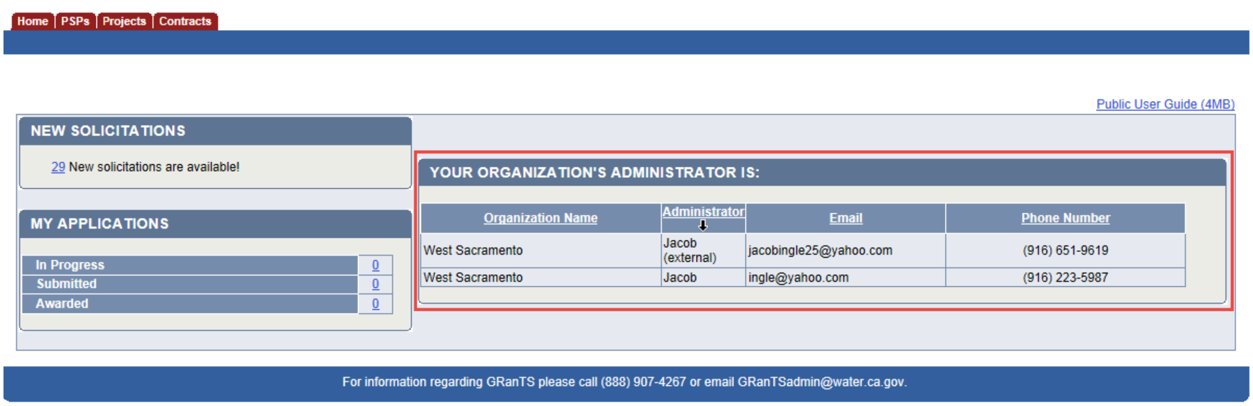


Only the Organization Administrator can register an Organization in GRanTS. Login to GRanTS and the Organization Administrator will be shown on your home page. Contact the Organization Administrator and ask them to register the Organization. If no Organization Administrator is shown on your home page, 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.

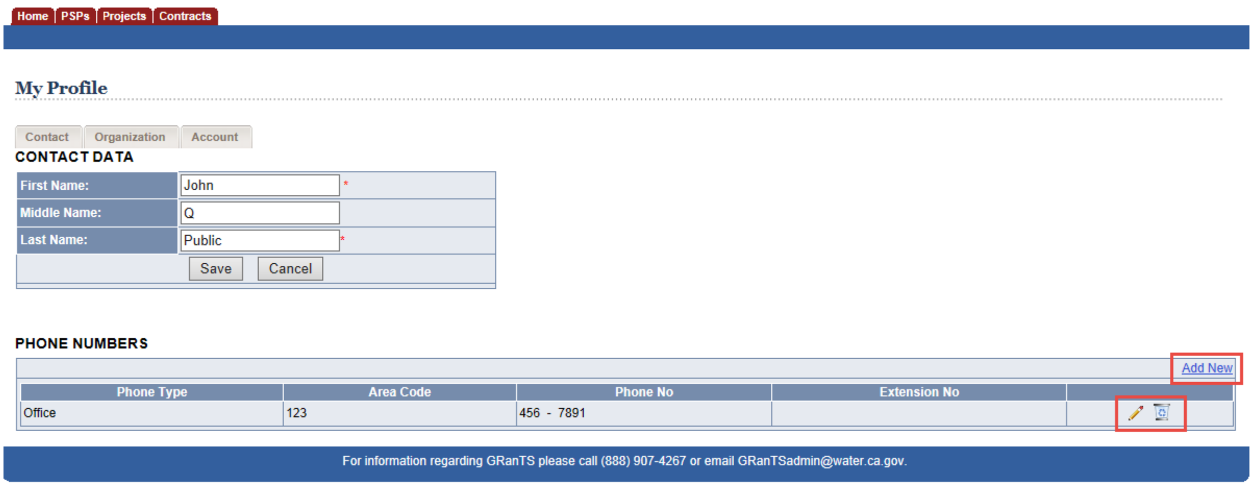


To view projects, contracts, and proposals that belong to an organization, send an email or call the organization's administrator to ask for access. The Organization Administrator's contact information is listed on the right side of your **Home** page as circled above.

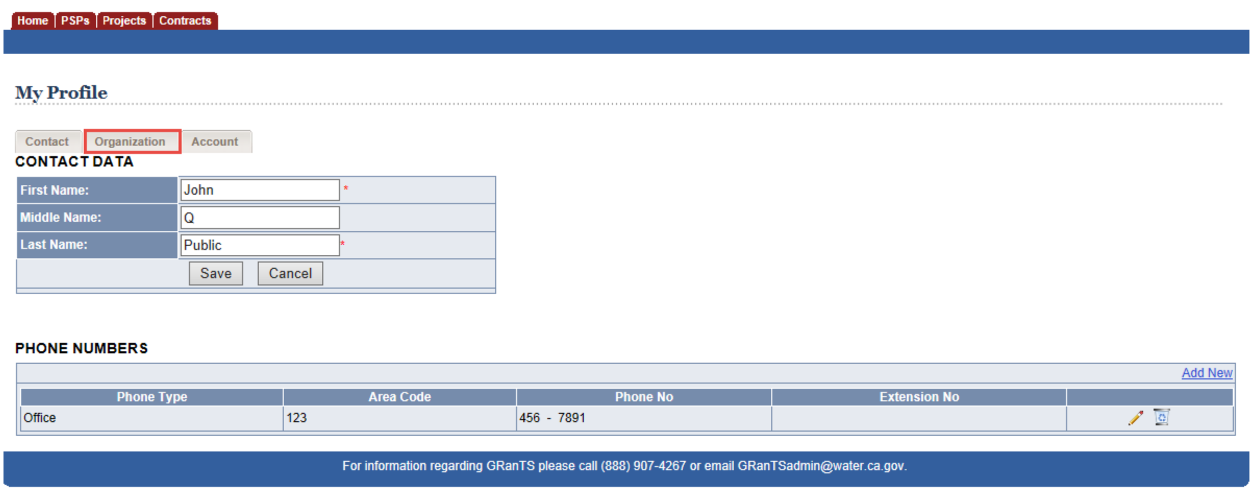
IV. My Profile

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

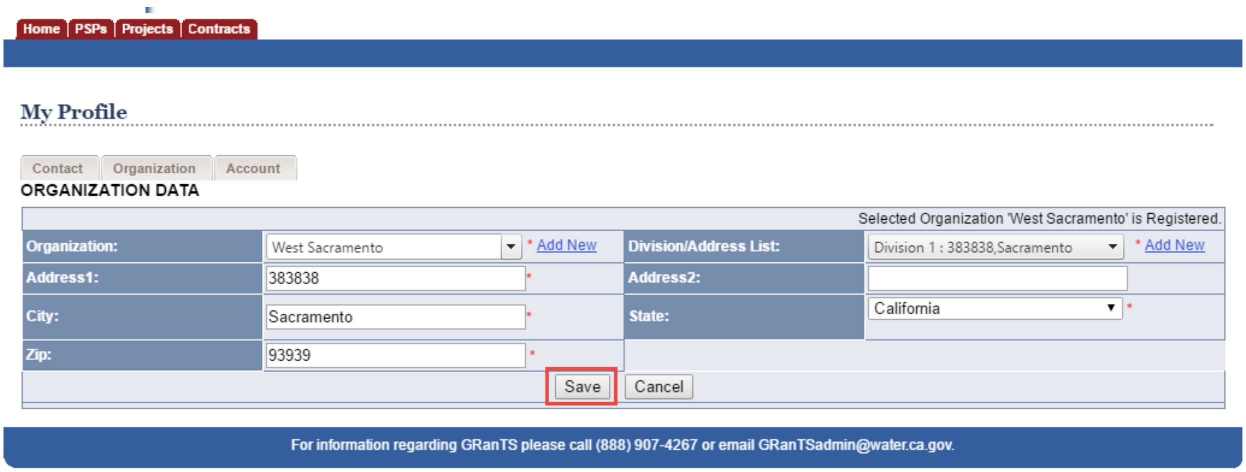
The **My Profile** screen will be displayed. To edit or delete a phone number, click on the **Pencil** or **Trash** icon on the far right side of the screen. To add an additional phone number, click on the **Add New** hyperlink.



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



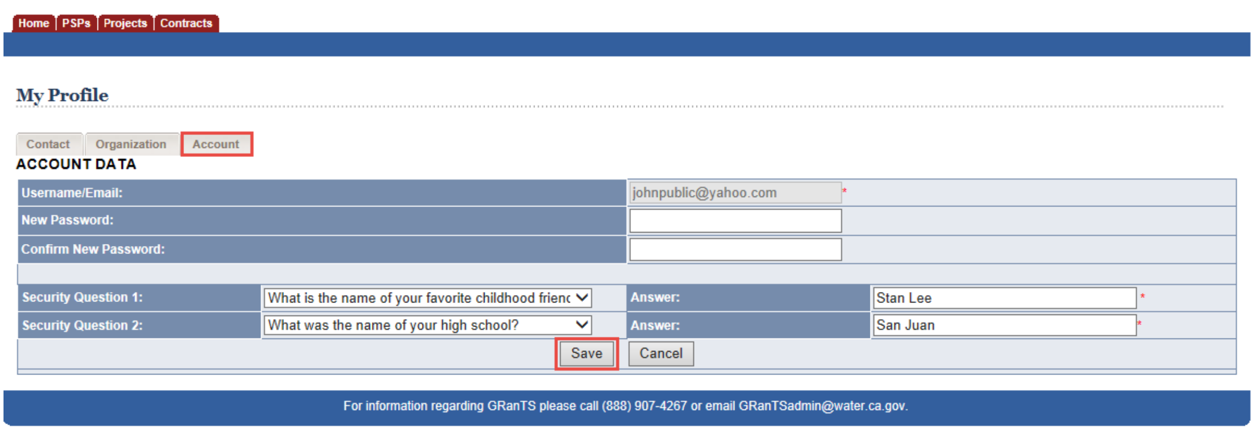
From here, select the name of the organization you would like to join from the dropdown menu, select a division, and click on the **Save** button.



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.



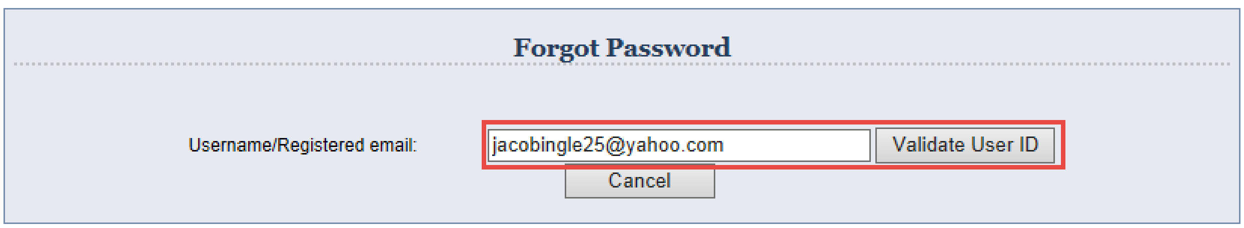
V. Forgotten Password

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.

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.

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

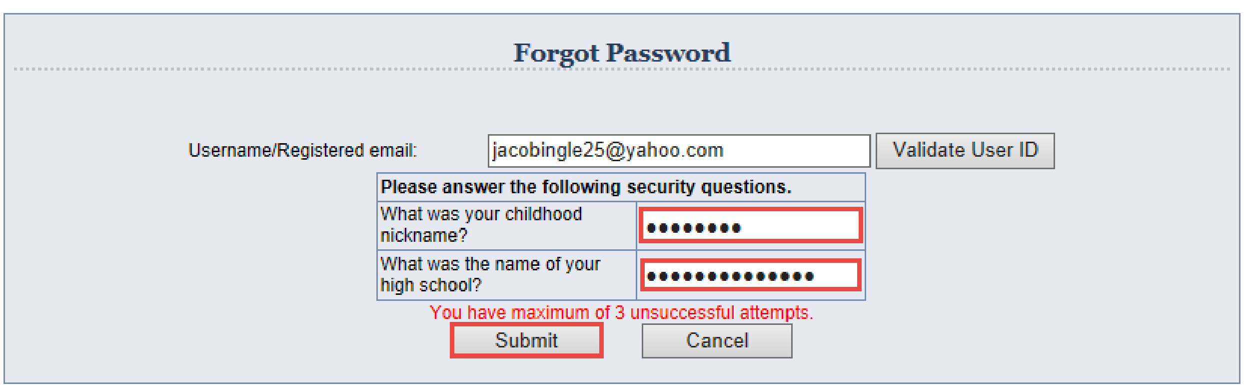
The **Forgot Password** page will be displayed. On the **Forgot Password** page, enter the Username/Registered email address of the Public User whose account password is to be reset then click on the **Validate User ID** button.



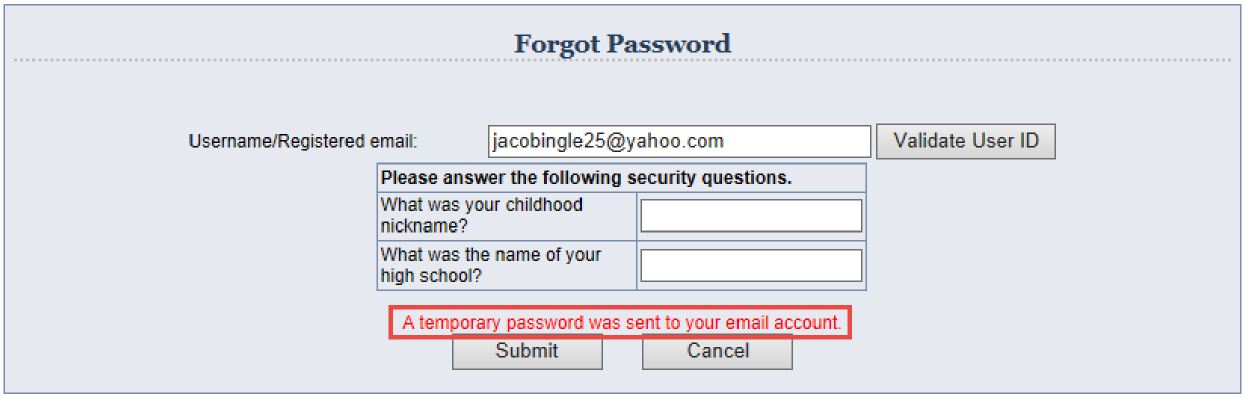
The two security questions defined during the User Registration process and associated with the user account will be displayed.

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.

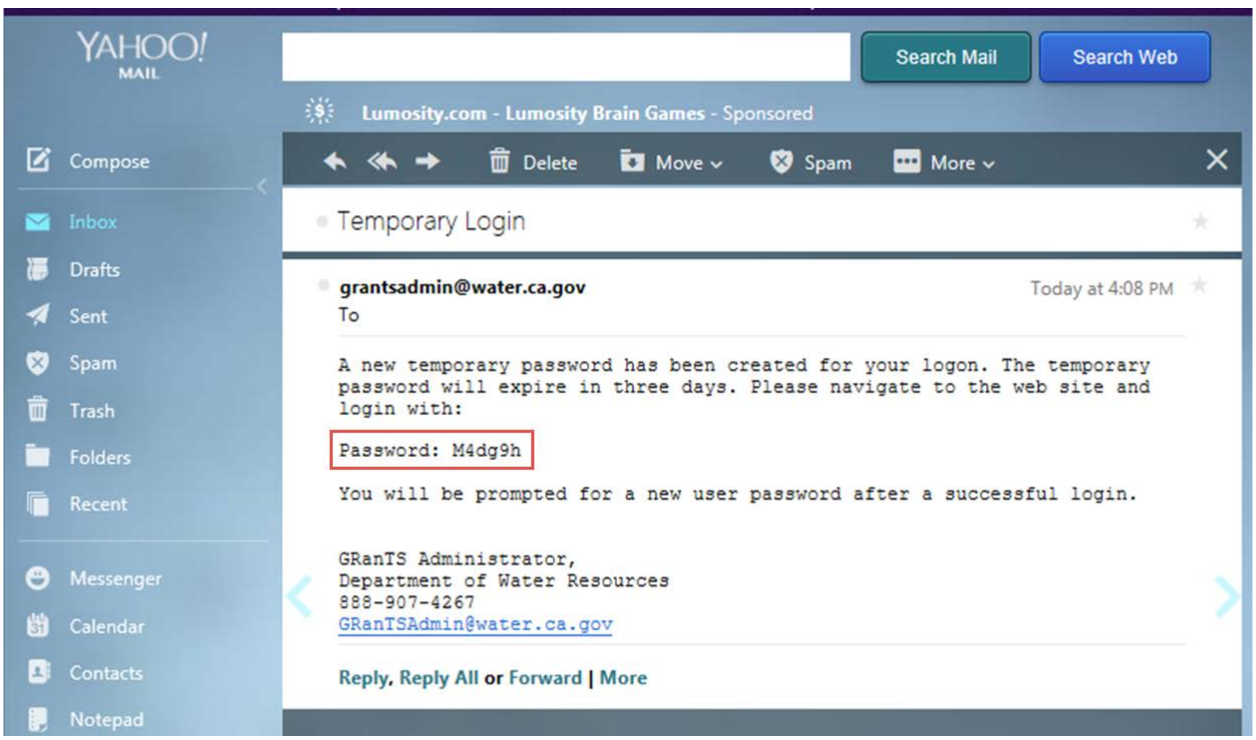
After providing the correct answers to both Security Questions, click on the **Submit** button.



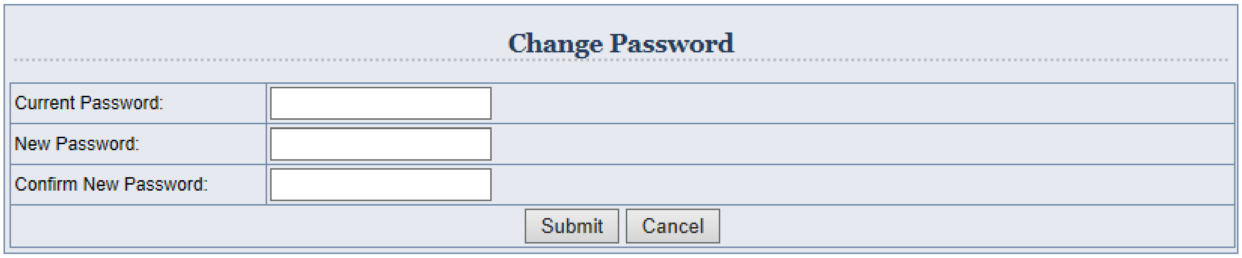
If answered the security questions correctly then you will see a notification at the bottom of the screen that says, “A temporary password was sent to your email account.”



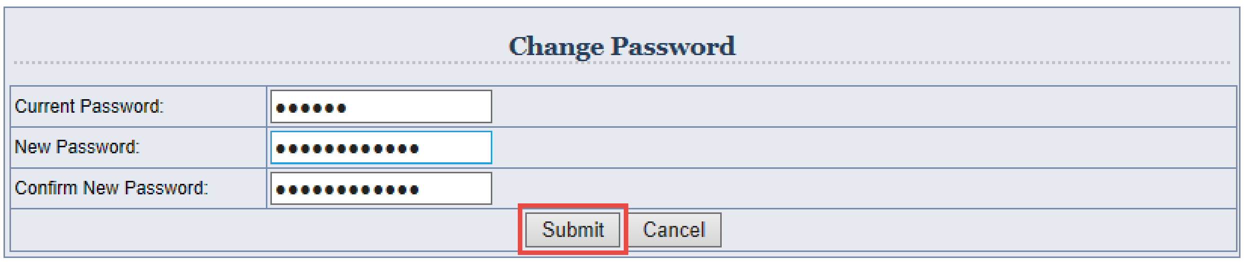
An email containing the temporary password and instructions on how to reset the account’s password will be sent to your email address.



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.



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



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

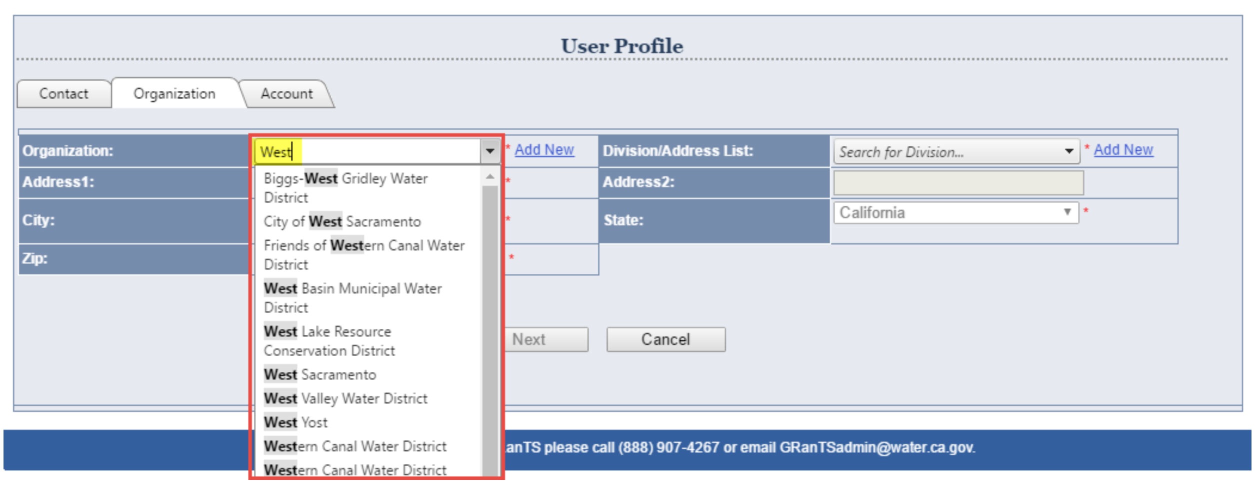
It is important to search and find your organization if it has already been entered into GRanTS. There are several reasons your organization might already be entered and they include the following:

- 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.

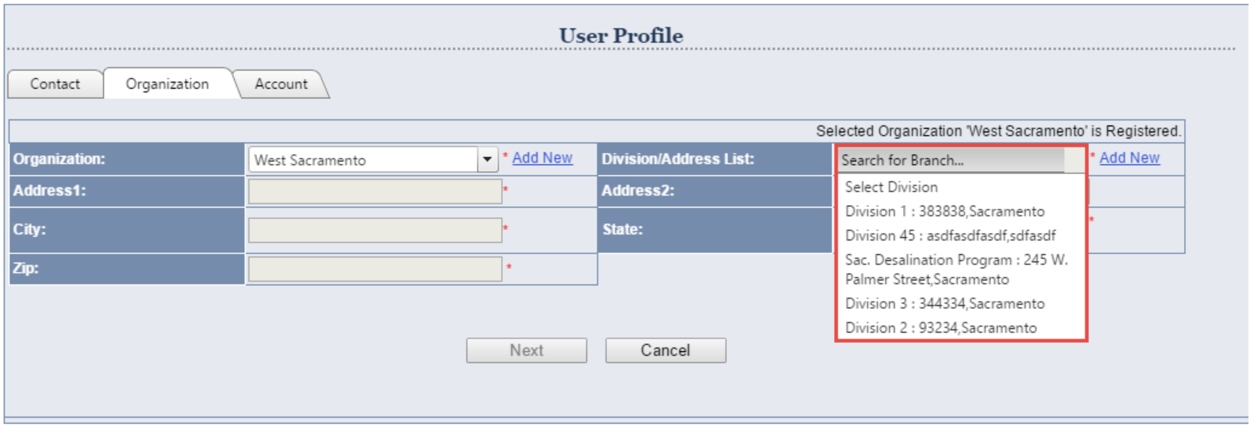
Please search thoroughly for your organization before clicking on the **Add New** hyperlink. Your organization is the primary entity that will contract with DWR. Each sub-department or division should select the higher organization from the drop-down menu and either select their division or add a new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

To search for an organization, the basic steps are:

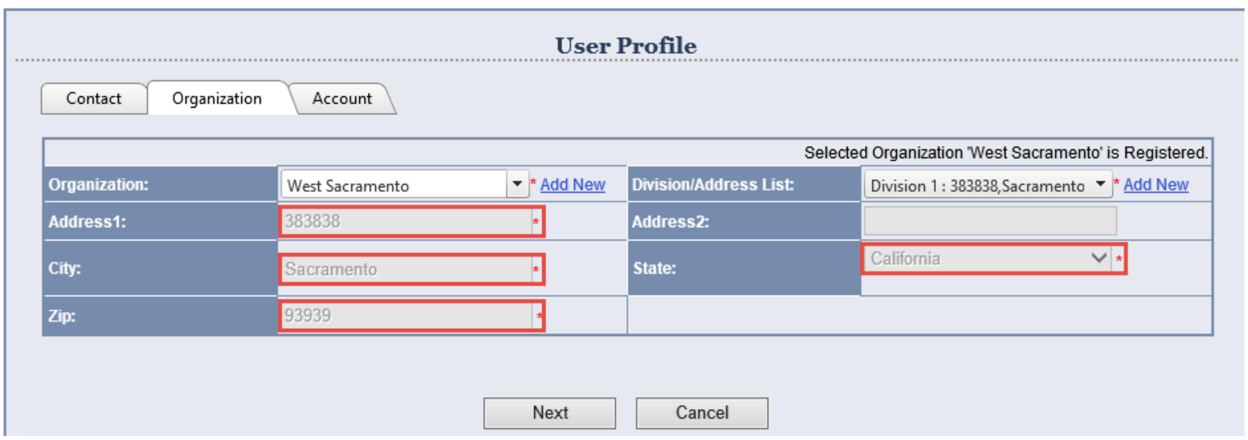
1. Select an existing Organization name from the **Organization** dropdown field. You can start typing the name of your organization in this field to narrow the list to show matching organization names.



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



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.

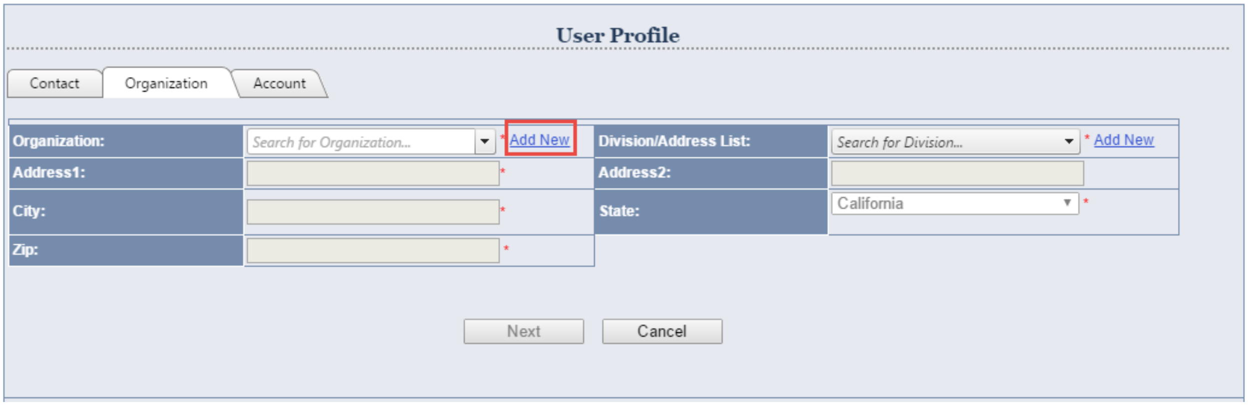


B. Creating a New Organization

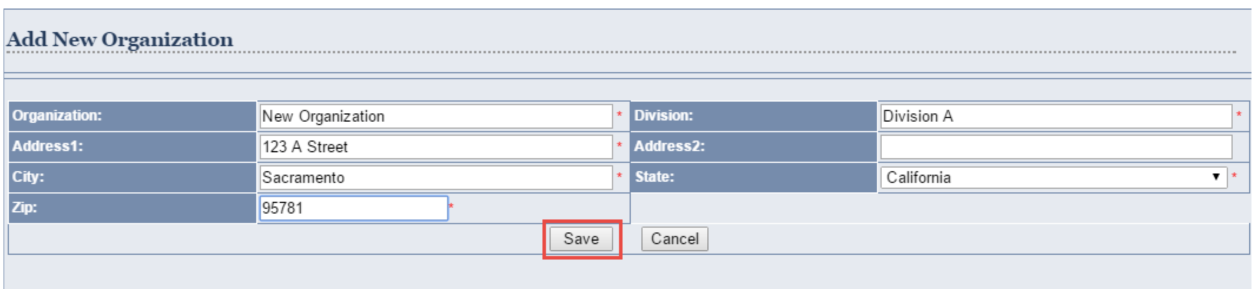
To enter a new organization name (one that does not exist in GRANTS) follow these steps:

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.

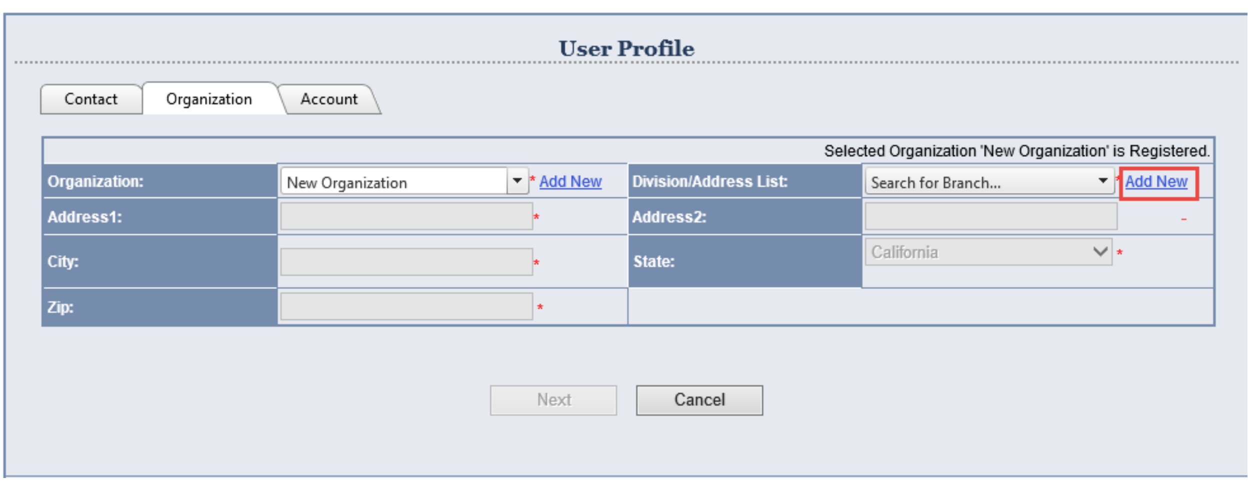


Enter the address and contact information. Click on the **Save** button to save the information you entered. You will then be returned to the **Organization** screen.

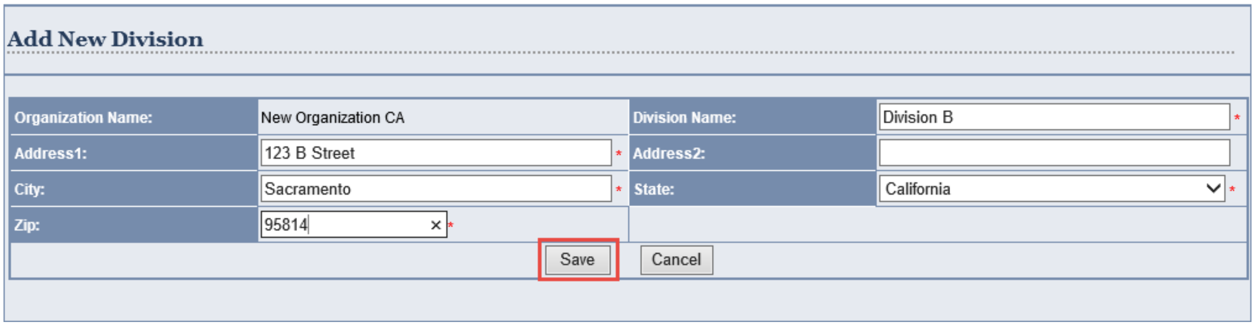


C. Adding a new Division

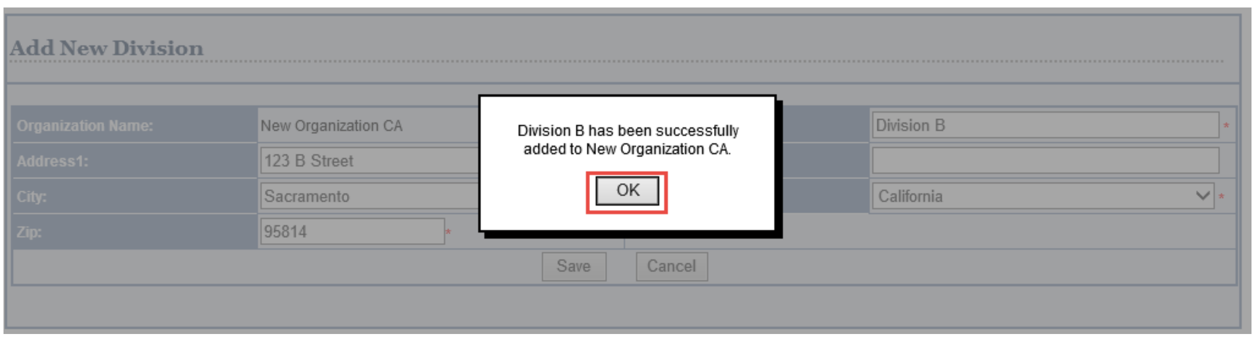
After searching for and finding your organization, select the drop-down arrow to choose your division and/or address location. If an entry in the **Division/Address** field is not found, it is necessary to add a new one. To create a new division, click on the **Add New** hyperlink.



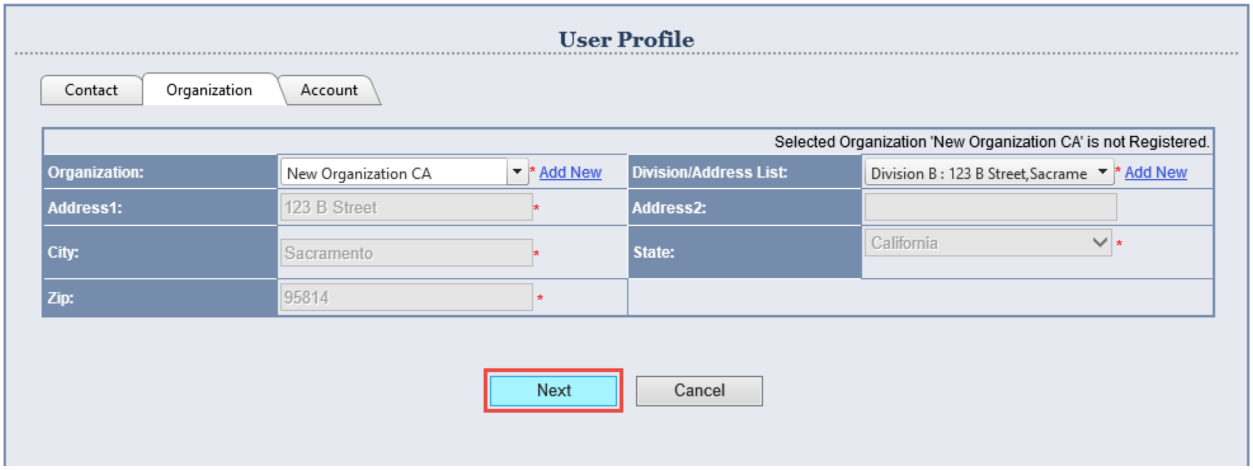
Enter the new division name (i.e. Sac. Desalination Program), address, city, state and phone information on the **Add New Division** page. Click on the **Save** button to save the information you entered.



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.



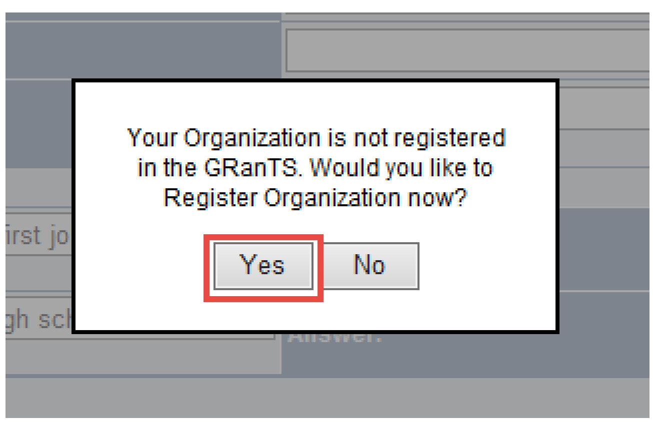
Now you will be able to find both your organization and your division in their respective dropdown menus. Once you have selected both your Organization and your Division click on the **Next** button to continue on to the **Account** tab.



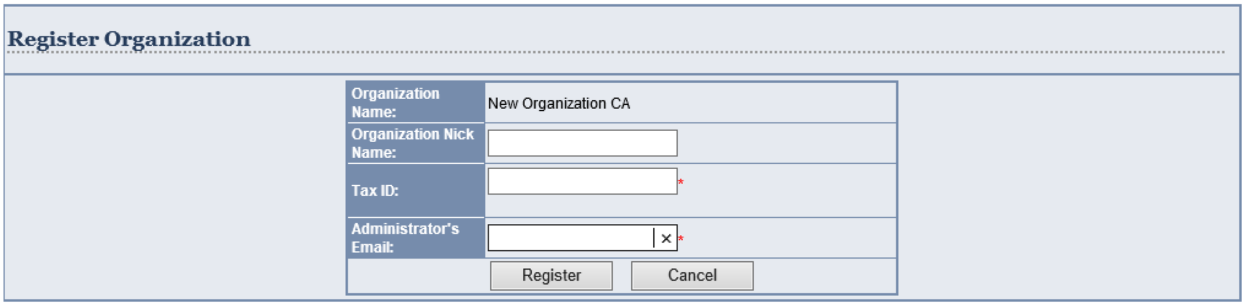
D. Registering an Organization

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.

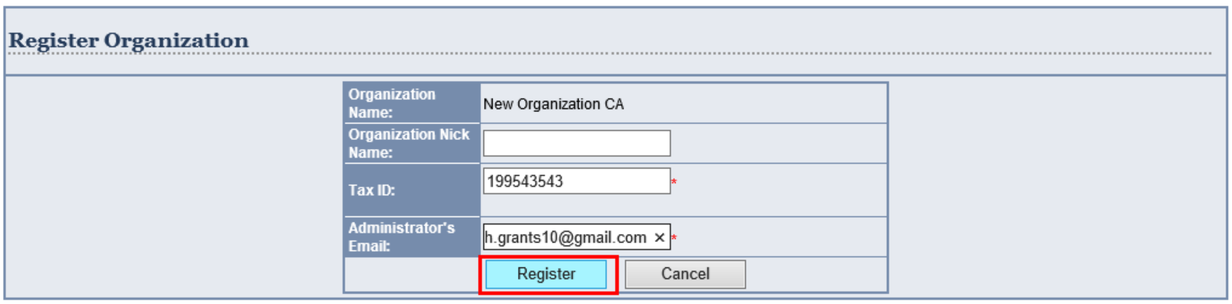
If you register your organization during the user registration process, click on the **Yes** button when asked if you would like to register your organization.

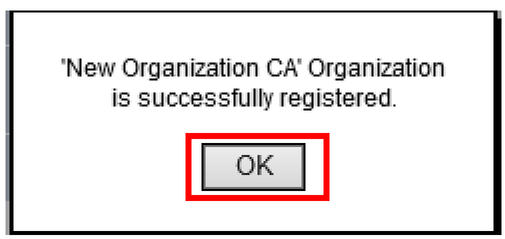


You will then be redirected to the **Register Organization** page.



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**.





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

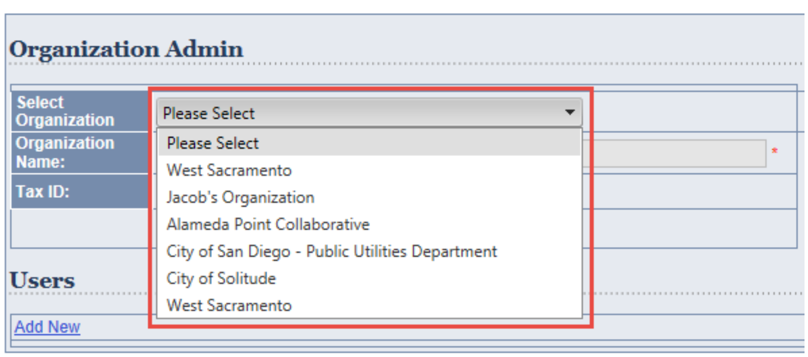
The procedure and steps associated with each operation of Organization Administration are discussed in the following section.

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.

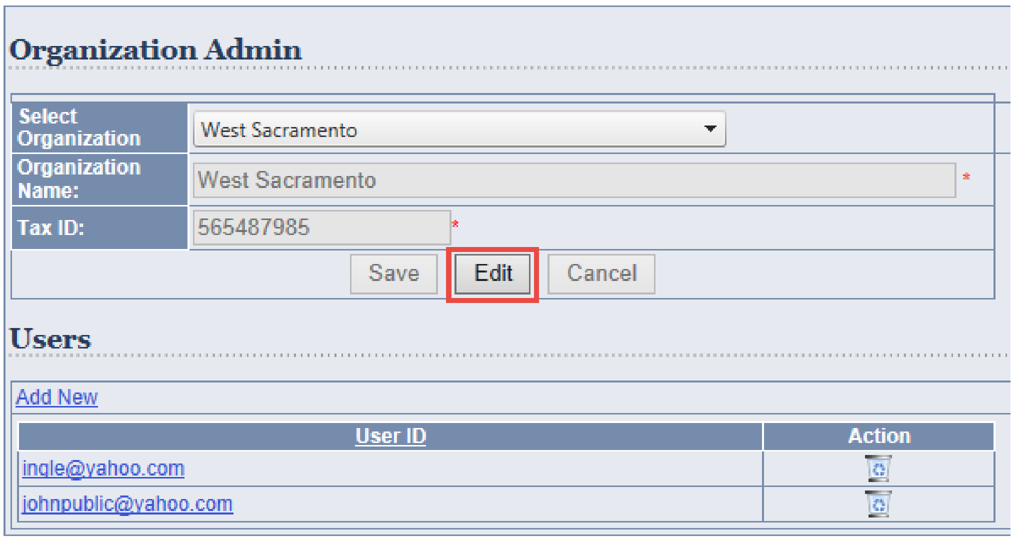
A. Changing your Organization's name or Tax ID

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.

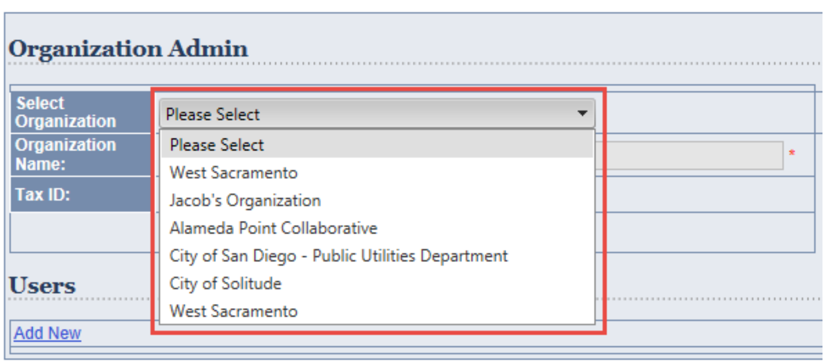


Details about the selected organization can be changed by selecting **Edit**. The entries in the **Organization Name** and **Tax ID** fields can be corrected from this screen. When your organization is saved with a Tax ID, all authorized users in your organization can apply for Proposal Solicitation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

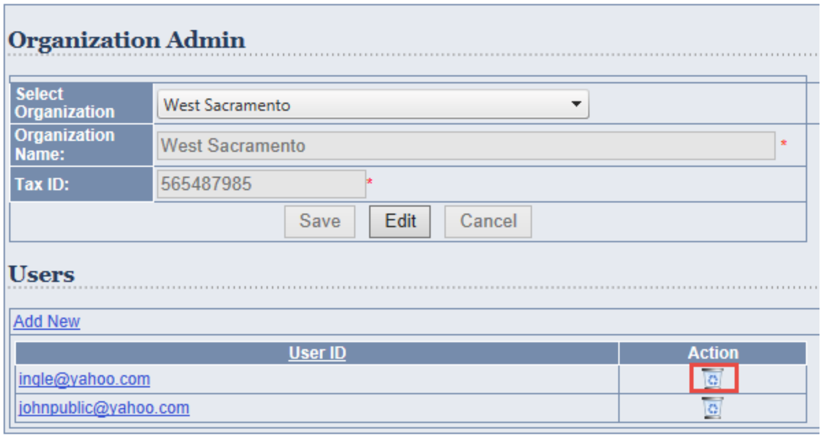


B. Add or Remove Public Users from your Organization

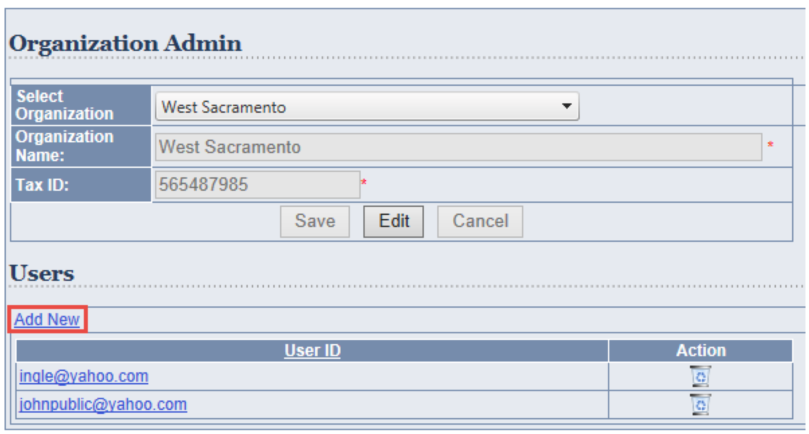
Click on the **Organization Admin** tab on the **Home** page. On the **Organization Admin** page, select an organization from the **Select Organization** dropdown menu.



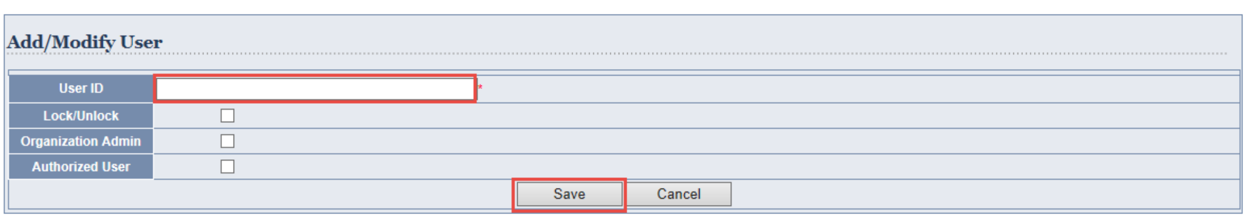
Once an organization is selected, a list of users that are registered with that organization will be displayed. To remove a user from your organization, click on the trash can icon to the right of their email address.



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



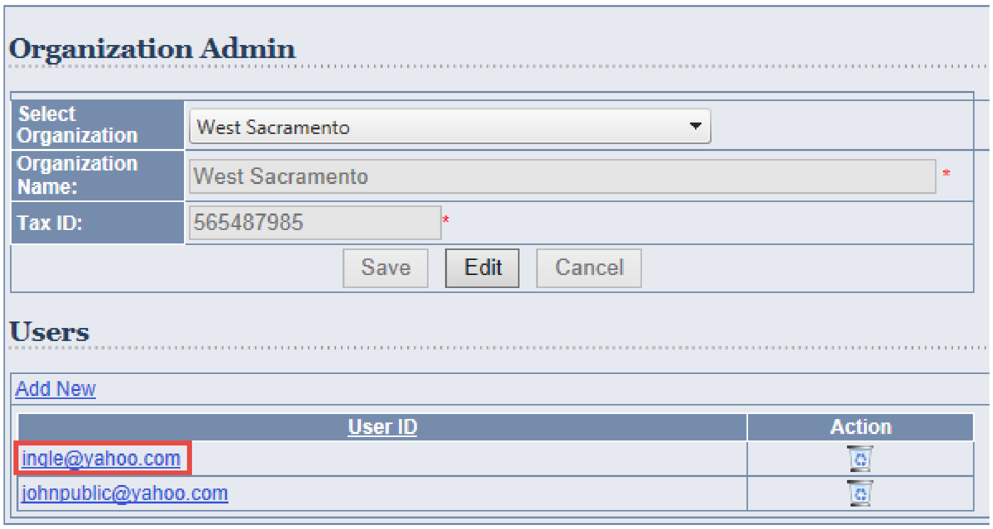
The **Add/Modify User** screen will be displayed. Type the email address of the registered user you want to add to your organization in the **User ID** box. Only users that have registered in GRANTS can be added to your organization. Click on the **Save** button to save the information you have entered.



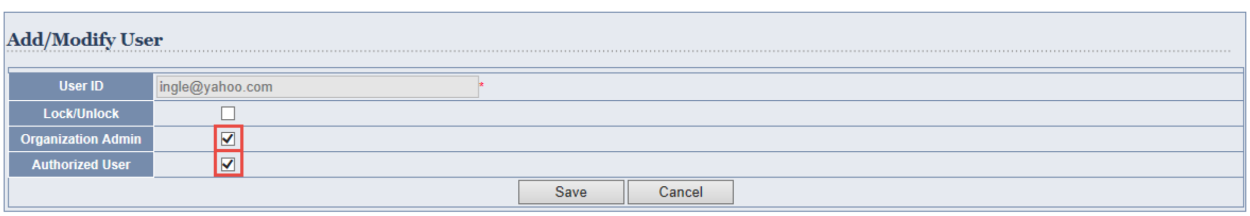
If you wish to give the user access to your organization's projects, contracts, etc., see section: Authorize Permissions for Public Users of your Organization. Without additional permission, they will only see when PSPs become available and your contact information.

C. Authorize Permissions for Public Users of your Organization

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



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.



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.

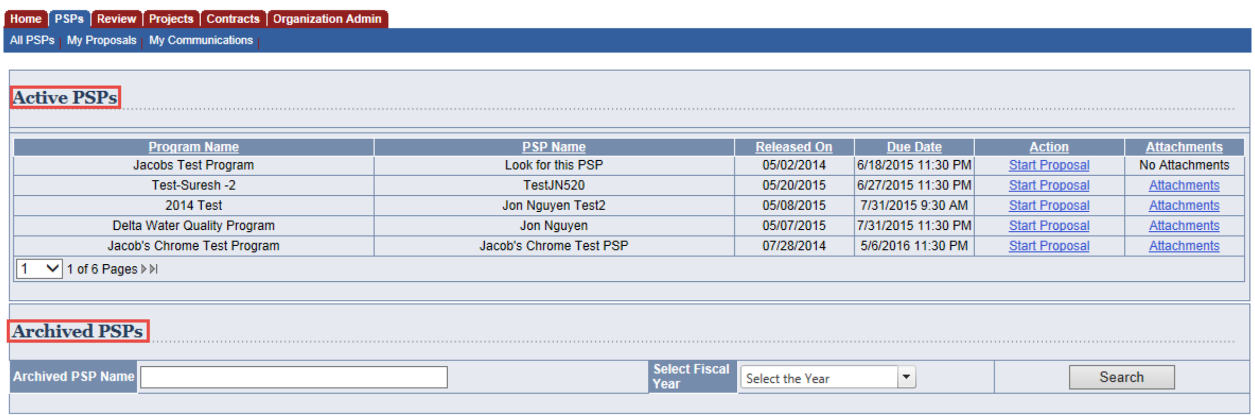
VIII. Preparing Proposal Solicitation Packages

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:

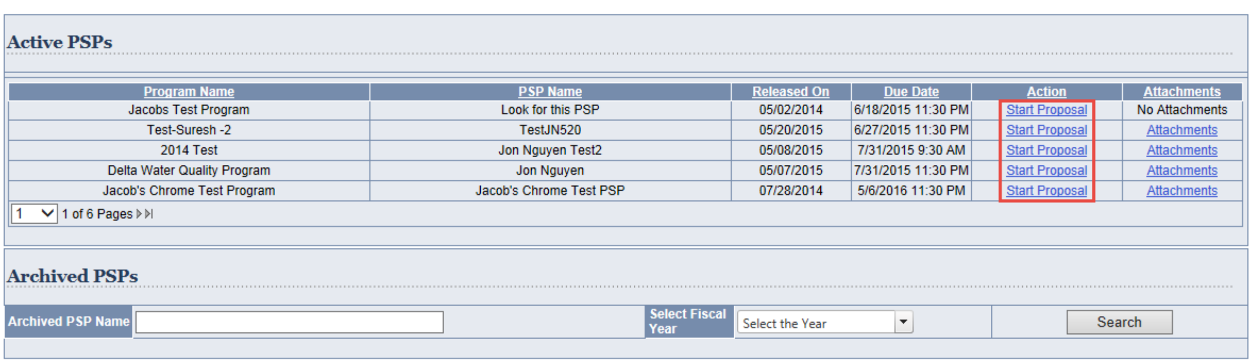
- All PSPs
- My Proposals
- My Communications

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



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

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



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

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*: Existing Registered Users / 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: Maximum Character Limit: 250
Location: Maximum Character Limit: 100
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: Maximum Character Limit: 250

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) *

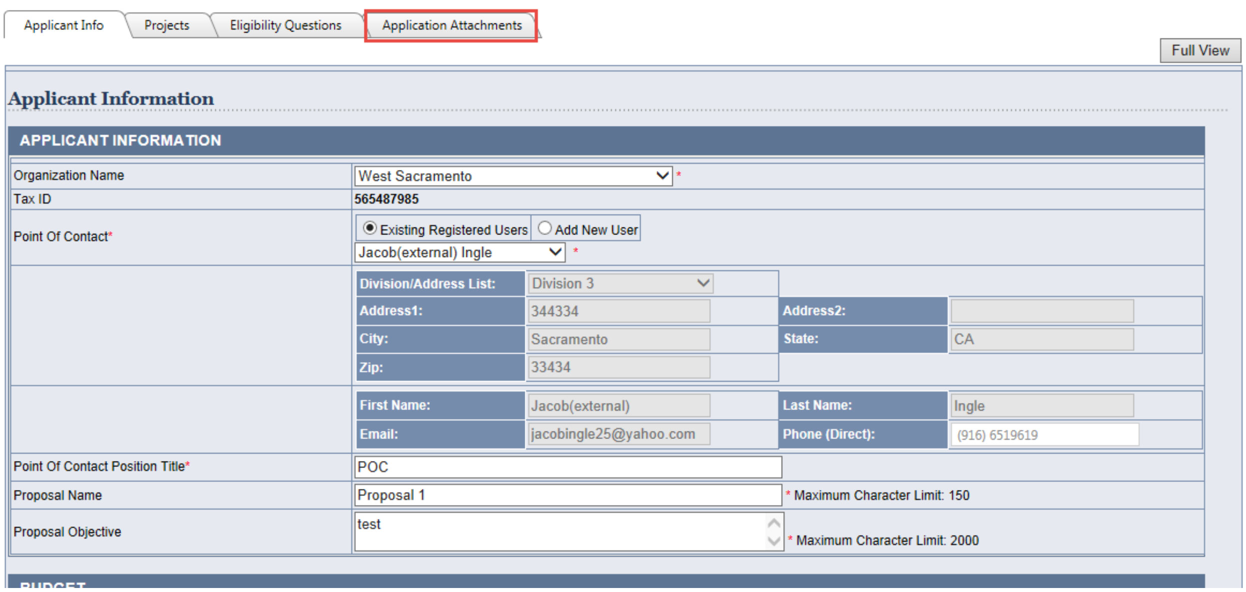
Save | Back | Submit

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.

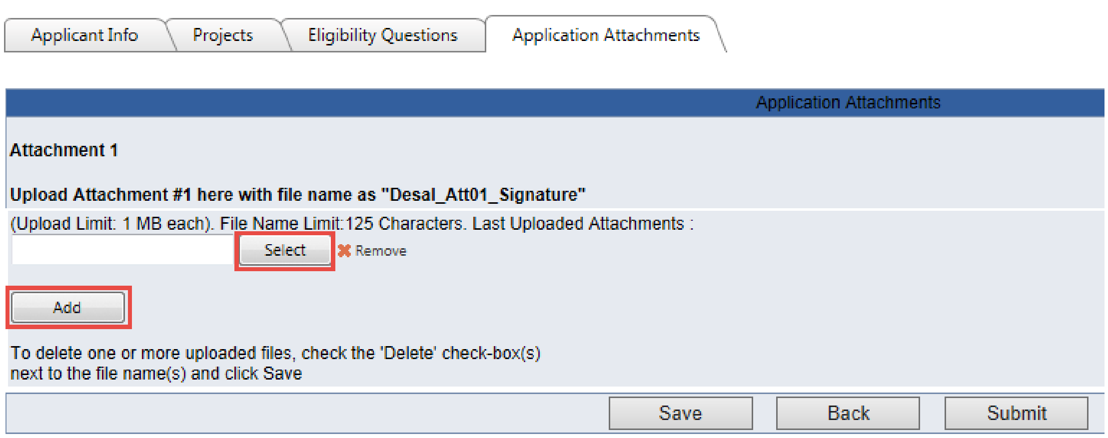
If you receive an error on the Applicant Information page noting that you are not authorized to create a proposal, double check that your organization has been registered and that your account has been authorized by your Organization Administrator. Instructions for these steps can be found in the Authorize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

B. Uploading Proposal Attachments

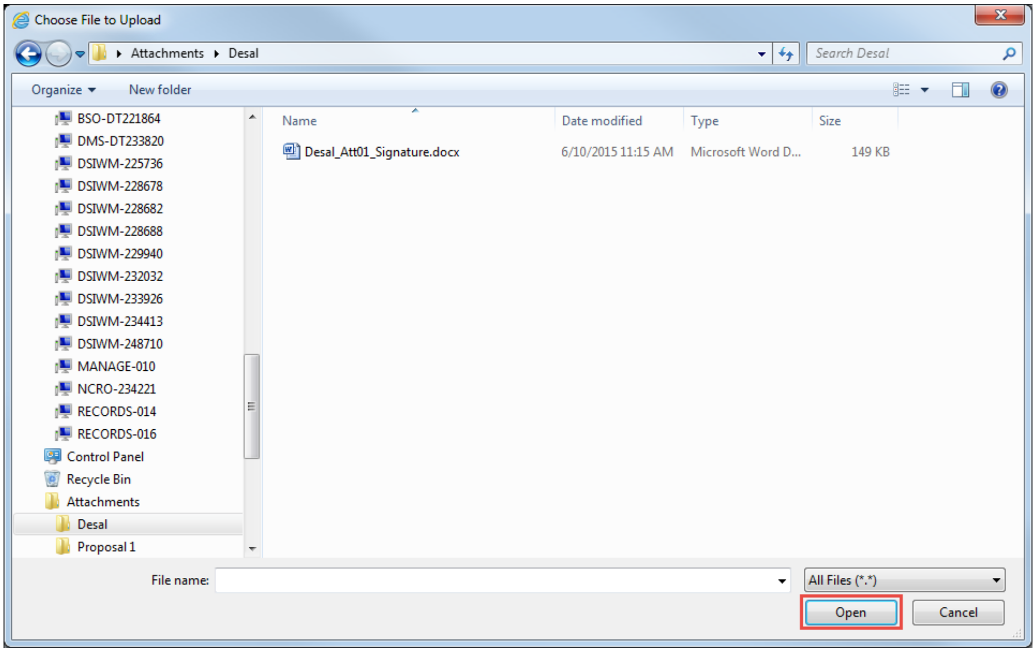
The following instructions will help you upload attachments to a proposal in GRANTS. Once the required fields in the Applicant Info tab are filled out, you can navigate to the other tabs in the proposal. Every PSP will have different questions so the tabs will not always look the same. In order to upload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



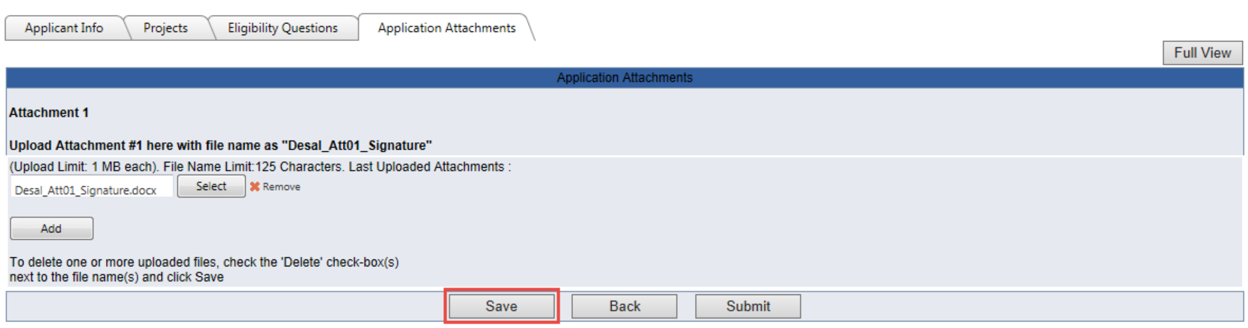
Click on the **Select** button to choose which file you wish to upload. To upload more than one file, click the **Add** button and another upload slot will appear. There is a maximum of 5 upload slots per question.



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.

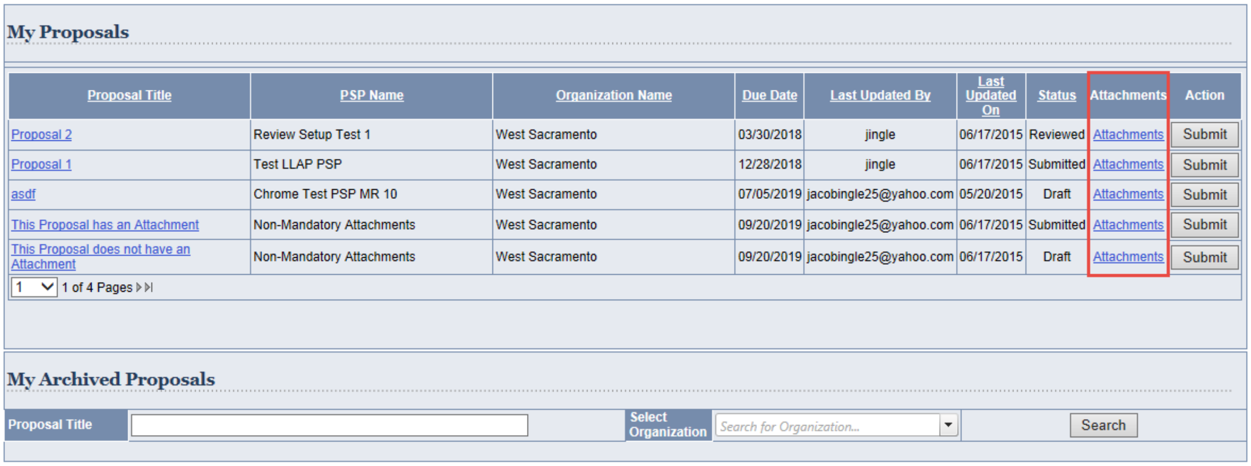


Repeat the previous steps for all of the attachments you wish to upload to the displayed page then scroll to the bottom of the page and click on the **Save** button.



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

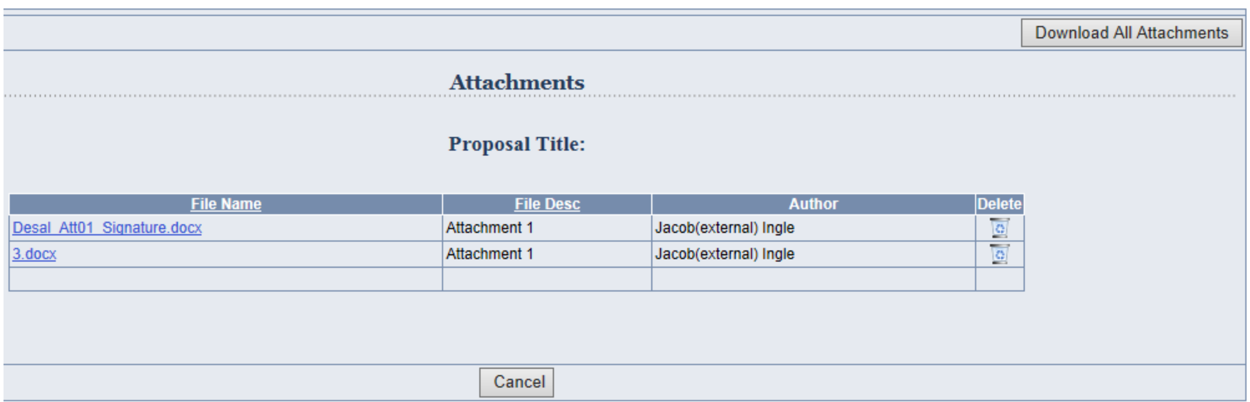
You can navigate to **My Proposals** under the **PSP** tab and select the **Attachments** link to view all of the attachments that you have uploaded for a given proposal.



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

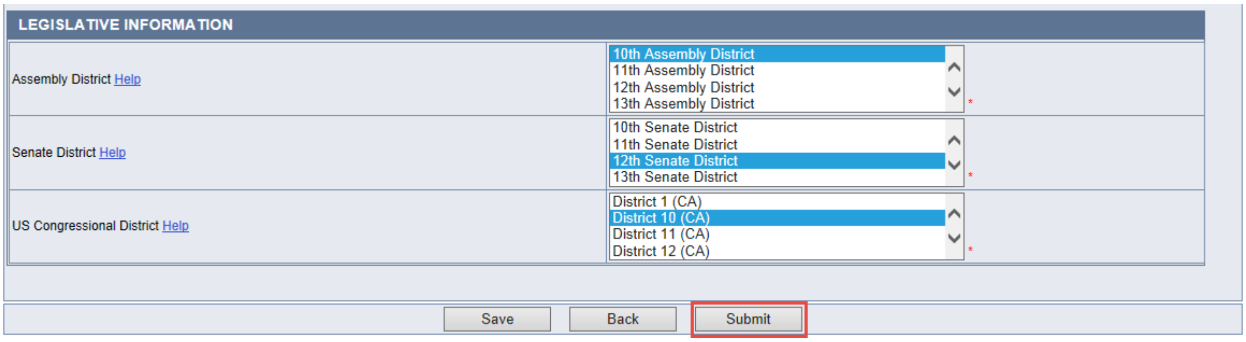
This shows you a full list of your proposal attachments from all sections of the application. We recommend you open the attached files to ensure they are the correct version if you have uploaded revisions several times.



File Name	File Desc	Author	Delete
Desal_Att01_Signature.docx	Attachment 1	Jacob(external) Ingle	
3.docx	Attachment 1	Jacob(external) Ingle	

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.

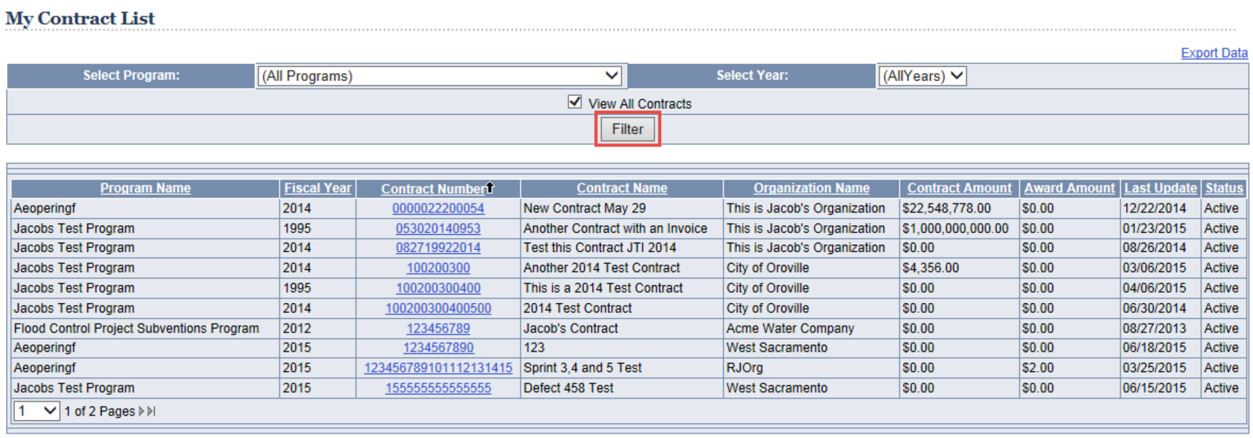


Your proposals will be saved under the **My Proposals** submenu item under the **PSP** tab.

IX. Viewing Contracts

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

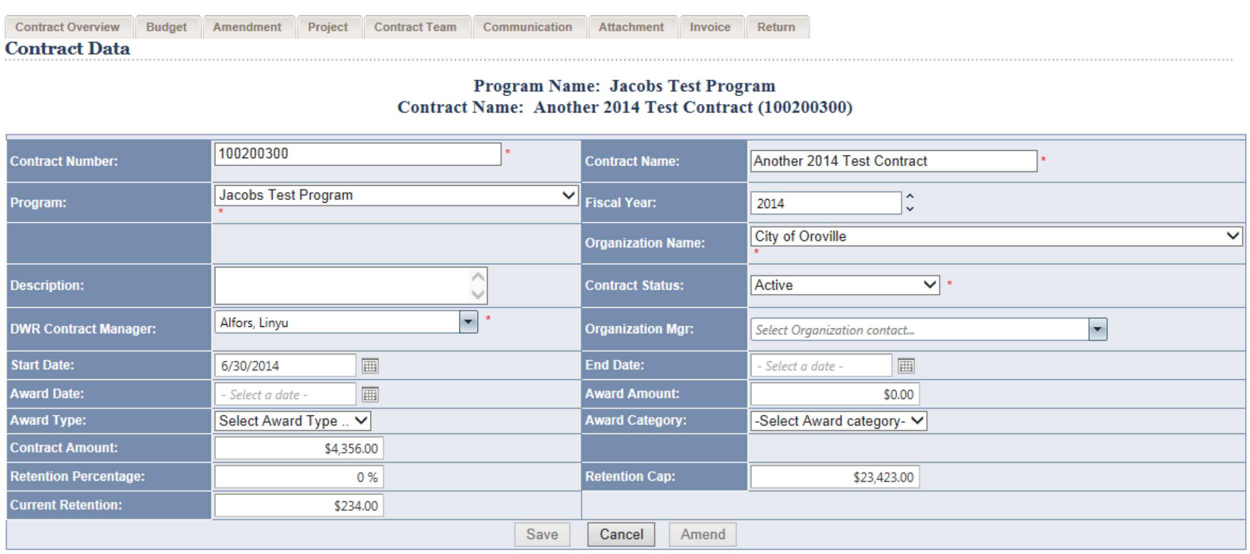
The **My Contracts** page will be displayed showing all of the Contracts that you have been assigned to as a part of the contract team. Select **View All Contracts** and then click the **Filter** button. This will allow you to see all of the contracts whose status is not 'Active'. You can also filter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



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

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

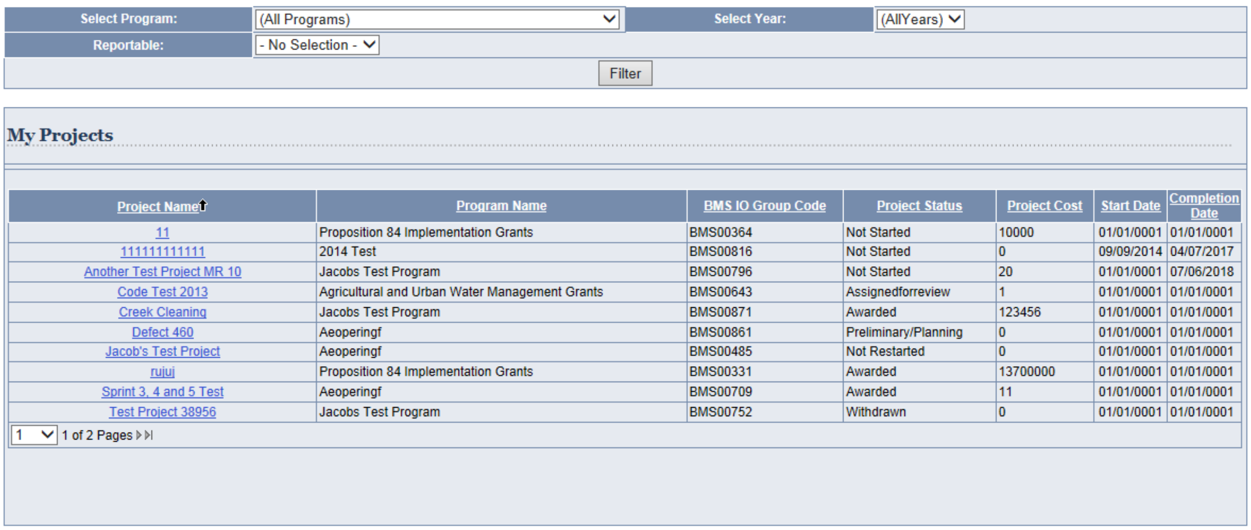
The **Contract Overview** workbook will be displayed with the details of your contract with DWR. If you see any errors or items that need to be changed, please contact your DWR contract manager.



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 -		

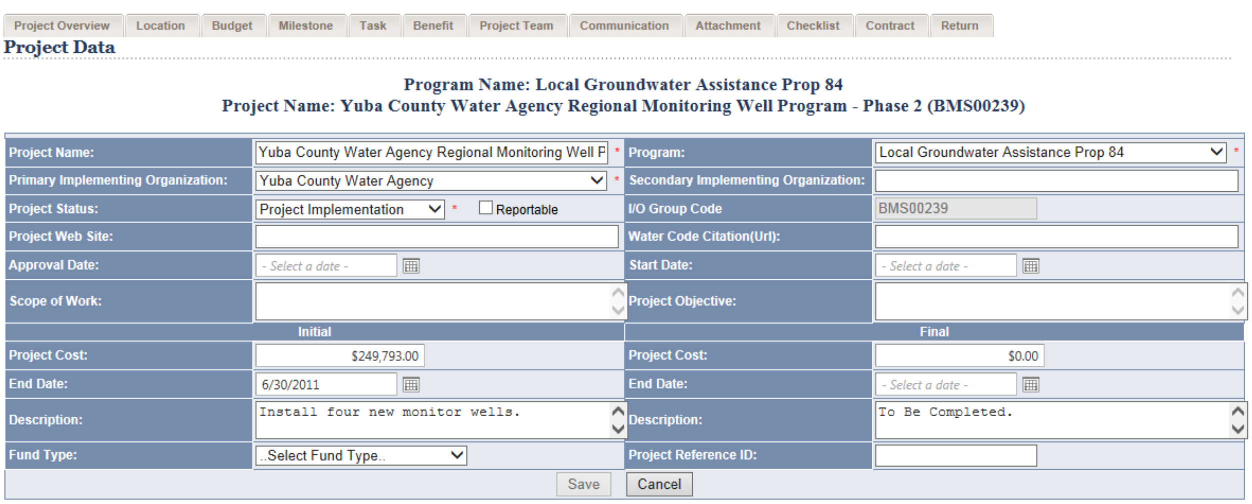
Filter

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
ruiui	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 | 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)

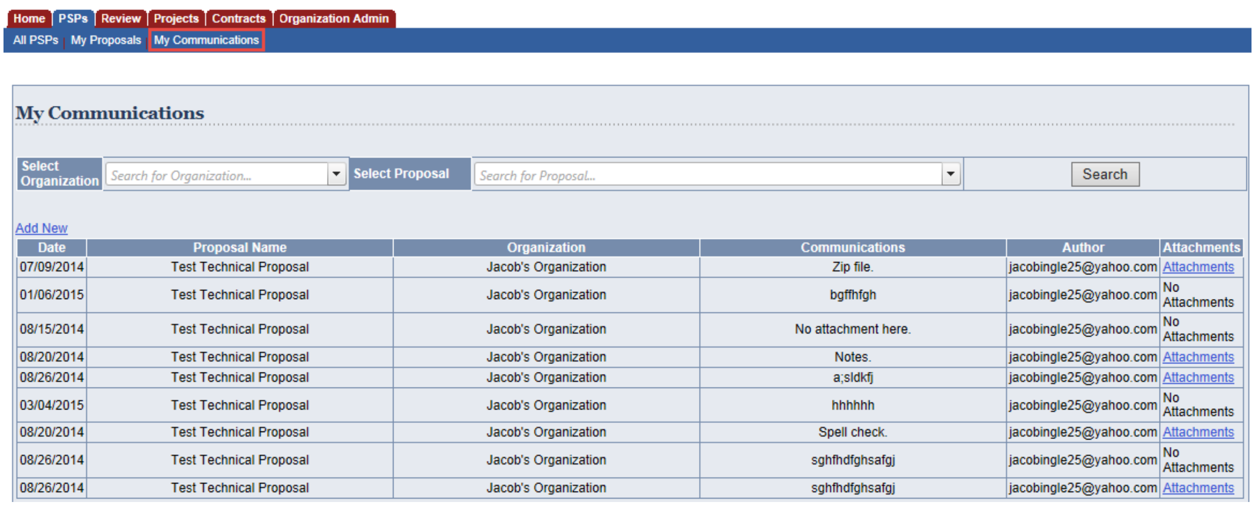
Project Name:	Yuba County Water Agency Regional Monitoring Well P *	Program:	Local Groundwater Assistance Prop 84 *
Primary Implementing Organization:	Yuba County Water Agency *	Secondary Implementing Organization:	
Project Status:	Project Implementation * Reportable	I/O Group Code	BMS00239
Project Web Site:		Water Code Citation(Url):	
Approval Date:	- Select a date -	Start Date:	- Select a date -
Scope of Work:		Project Objective:	
	Initial		Final
Project Cost:	$249,793.00	Project Cost:	$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

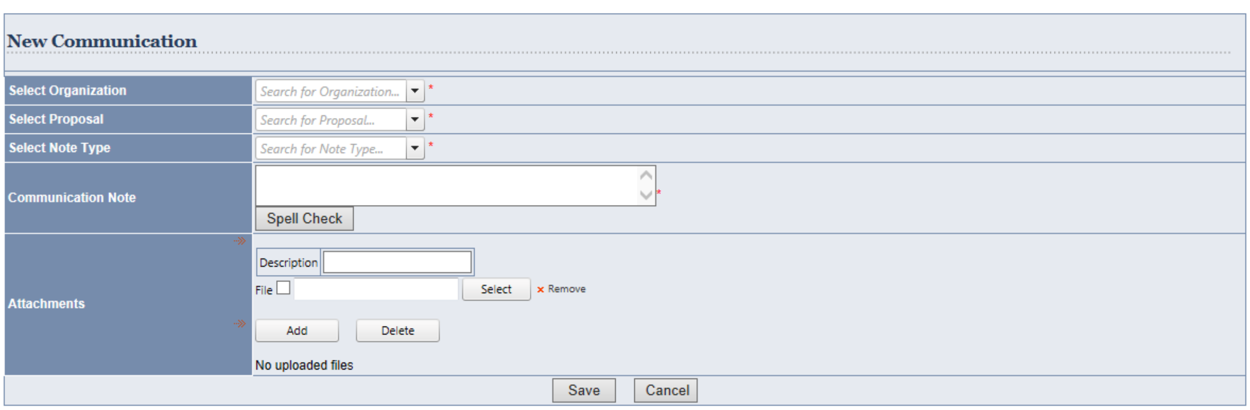
In the Contract, Project, Invoice, and PSP modules you will find communications and attachments tools. These tools have been created as a place to store critical information and documents regarding the Proposal, Contract, Project, or Invoice with which the communication or attachment is associated. All 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.



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	bgffhfgh	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	sghfhdfghsafgj	jacobingle25@yahoo.com	No Attachments
08/26/2014	Test Technical Proposal	Jacob's Organization	sghfhdfghsafgj	jacobingle25@yahoo.com	Attachments

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



XII. Working with Invoices

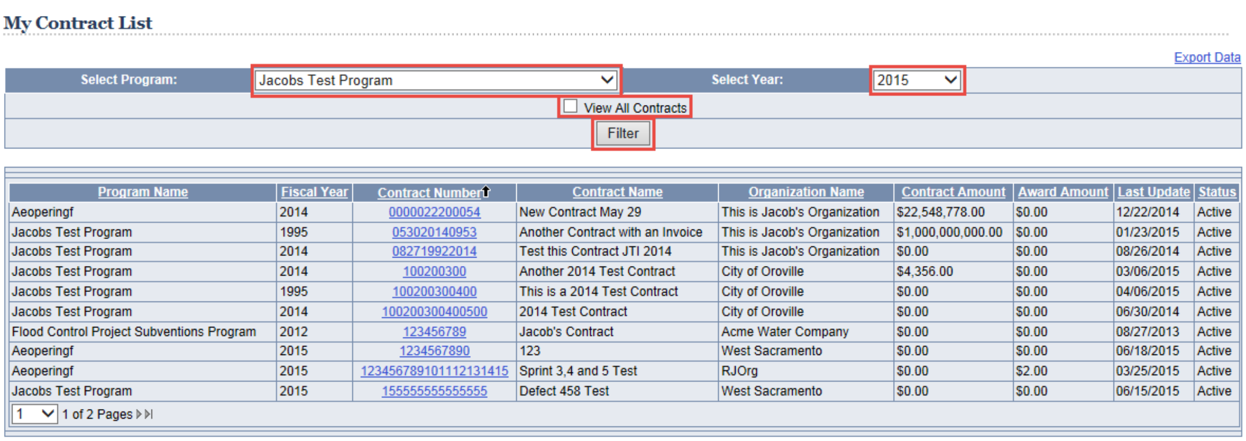
The **Invoice** tab of the contract workbook enables a public user to:

- 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.

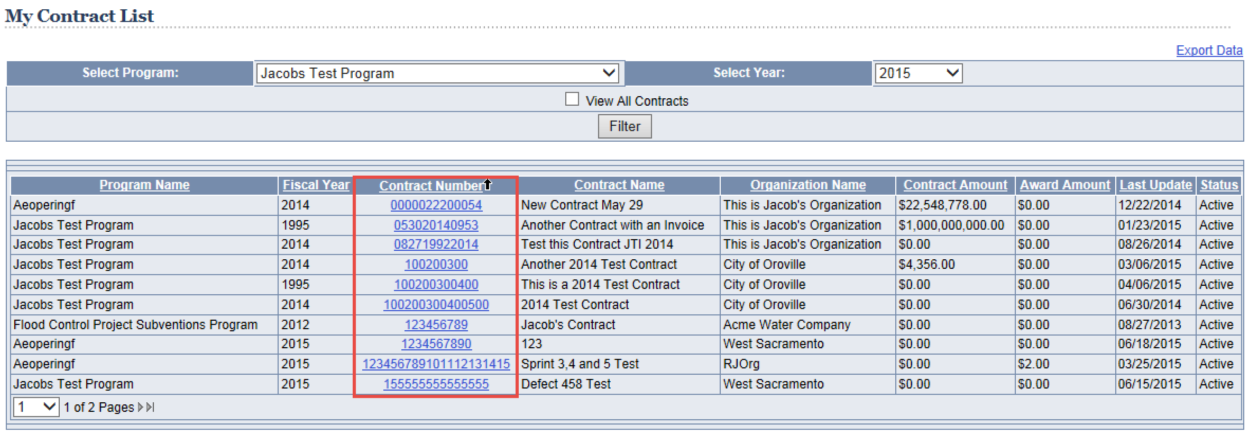
On the **My Contracts** page, select a program from the **Select Program** dropdown field. Next, select the fiscal year from the **Select Year** dropdown field. To view your organization's completed or closed out contracts, select the **View All Contracts** option. Click on the **Filter** button once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



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

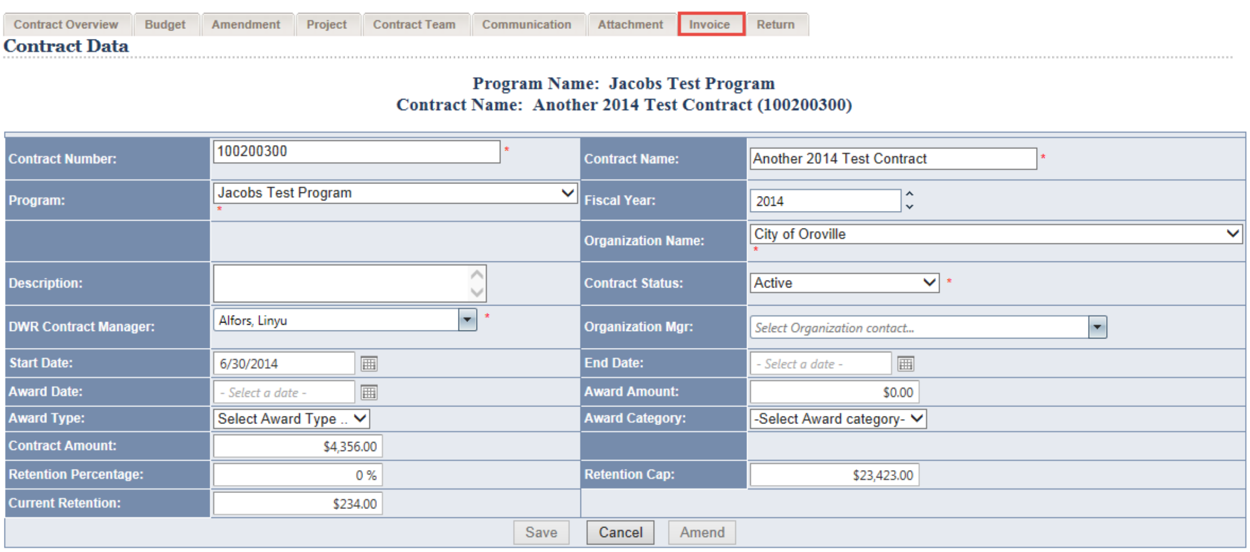
View All Contracts

Filter

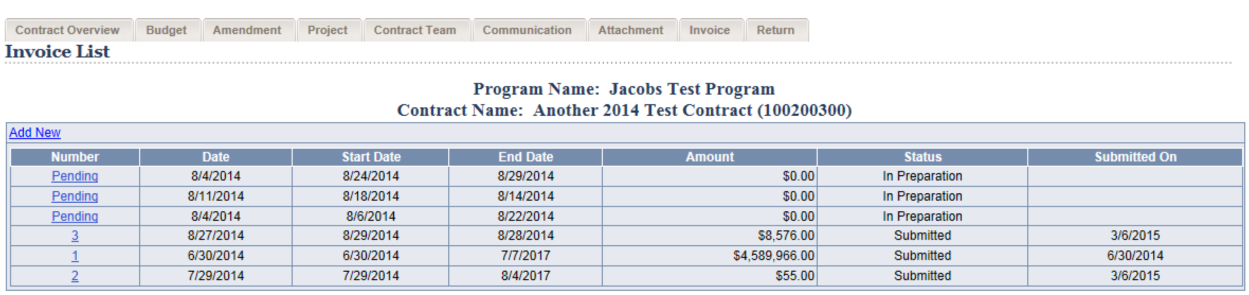
Program Name	Fiscal Year	Contract Number	Contract Name	Organization Name	Contract Amount	Award Amount	Last Update	Status
Aeoperingf	2014	0000022200054	New Contract May 29	This is Jacob's Organization	$22,548,778.00	$0.00	12/22/2014	Active
Jacobs Test Program	1995	053020140953	Another Contract with an 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.



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

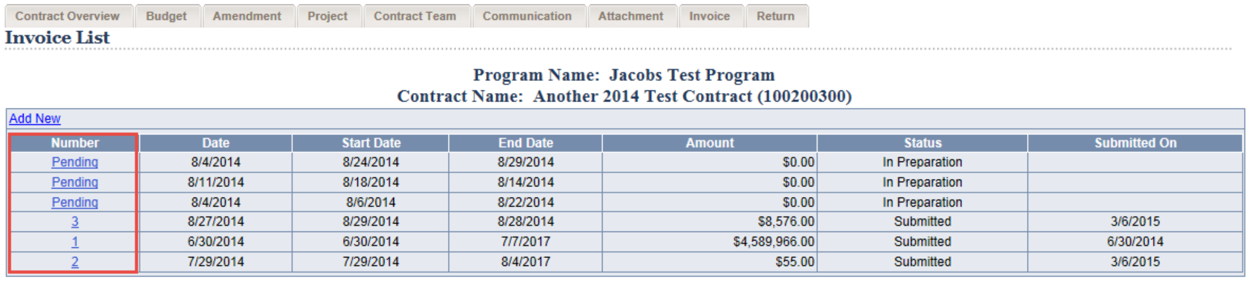
Invoice List

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

Add New

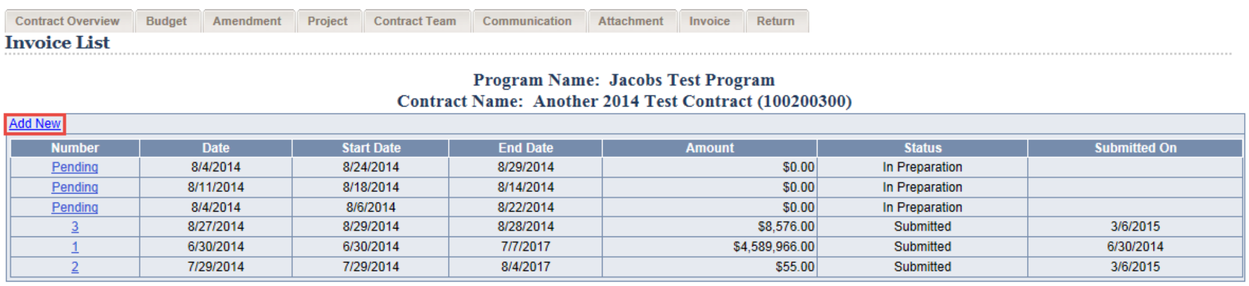
Number	Date	Start Date	End Date	Amount	Status	Submitted On
Pending	8/4/2014	8/24/2014	8/29/2014	$0.00	In Preparation	
Pending	8/11/2014	8/18/2014	8/14/2014	$0.00	In Preparation	
Pending	8/4/2014	8/6/2014	8/22/2014	$0.00	In Preparation	
3	8/27/2014	8/29/2014	8/28/2014	$8,576.00	Submitted	3/6/2015
1	6/30/2014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

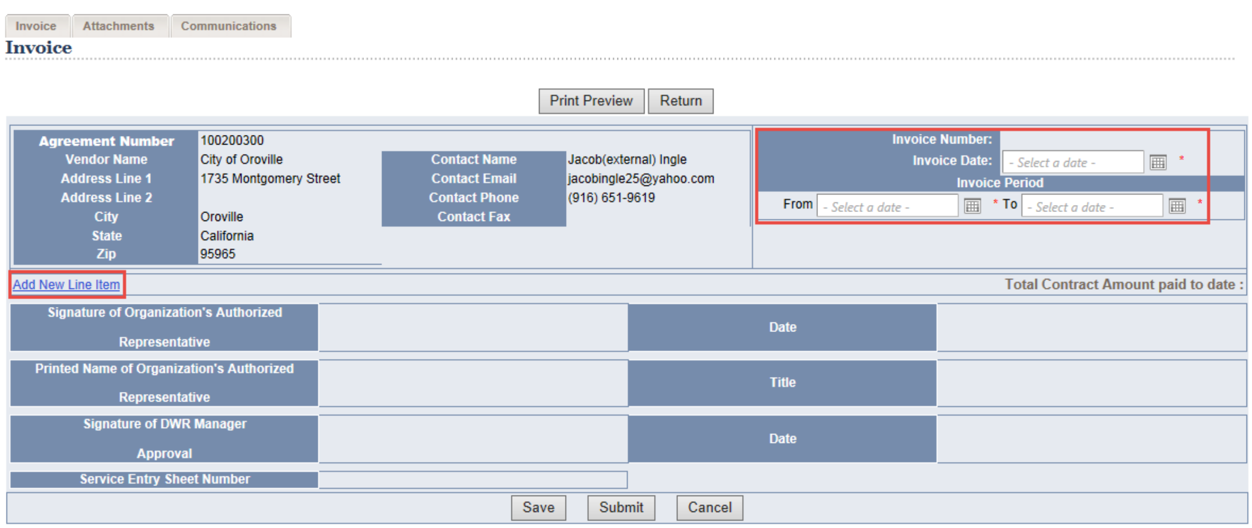


A. Preparing an Invoice for a Contract

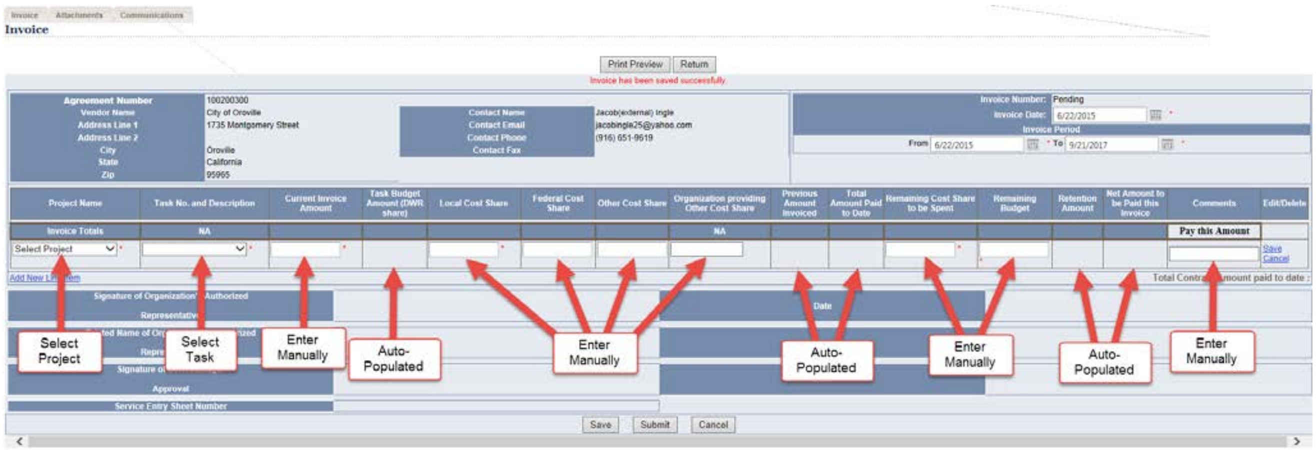
To add a new Invoice, click on the **Add New** hyperlink displayed above the Invoice List on the **Invoices** workbook tab.



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



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.

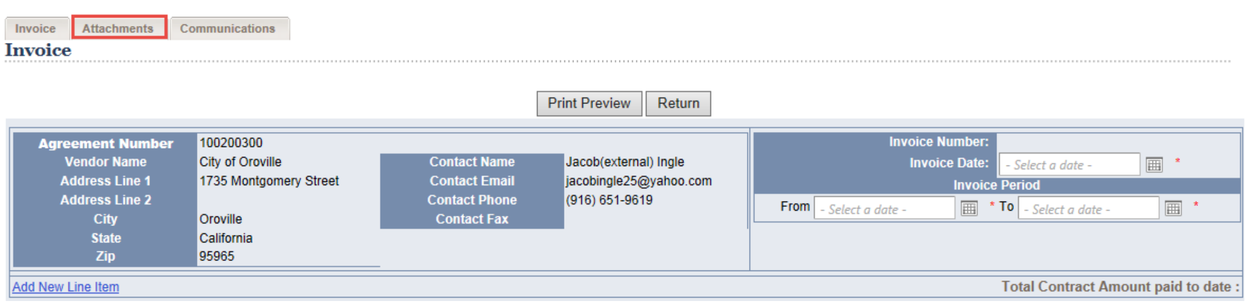
Select a **Task** from the **Task No. and Description** dropdown menu. Specify values for the following fields:

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

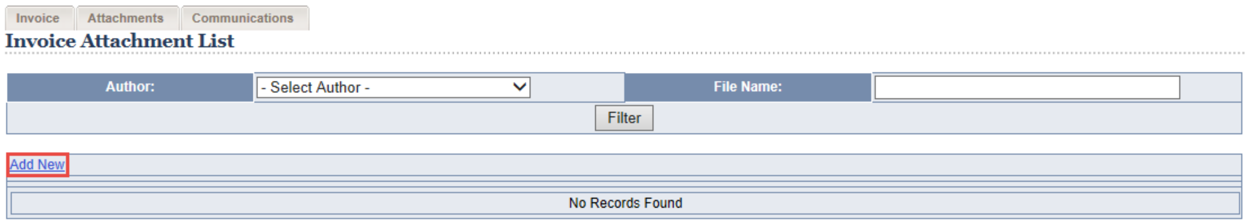
Repeat the steps above, as necessary, to complete the invoice. When you are finished, click on the **Save** button displayed at the bottom of the page then click on the **Return** button to return to the **Invoice List** page.

B. Invoice Attachments

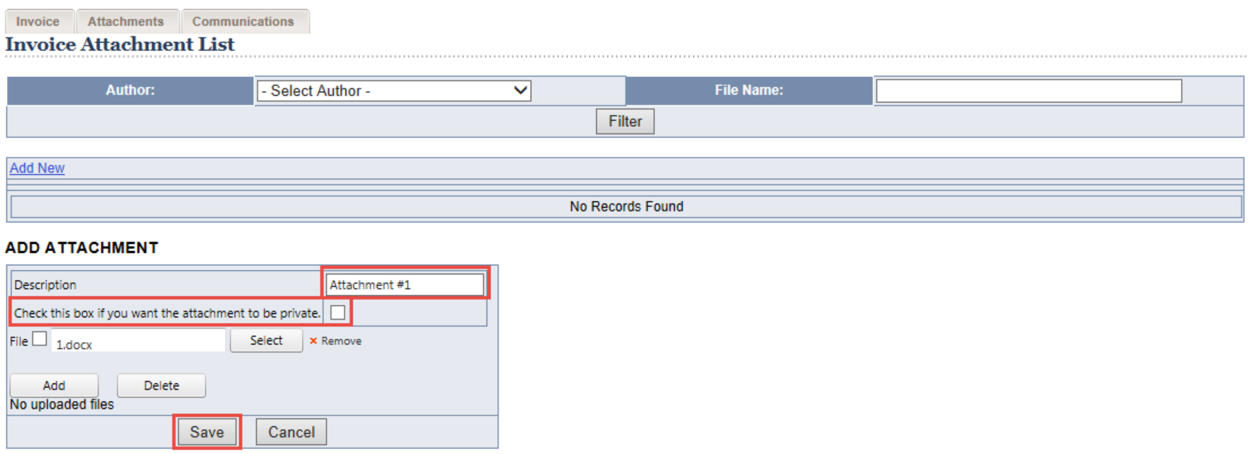
The attachment feature in the invoice module enables you to upload supporting documentation for invoices into GRANTS. Click on the **Attachments** tab for a selected invoice to begin.



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

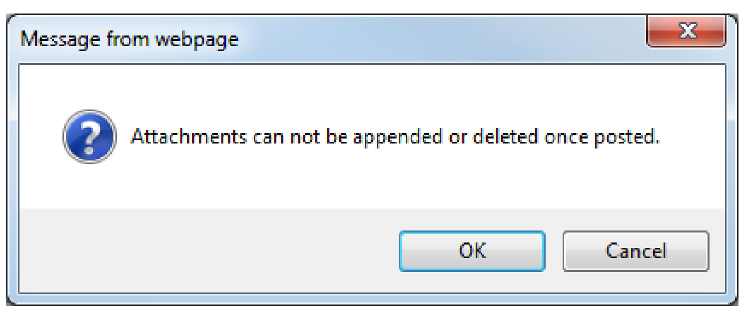


Be sure to provide a description and indicate if you want this attachment shared with others on the project team by checking the appropriate box. Click on the **Save** button once you are finished.

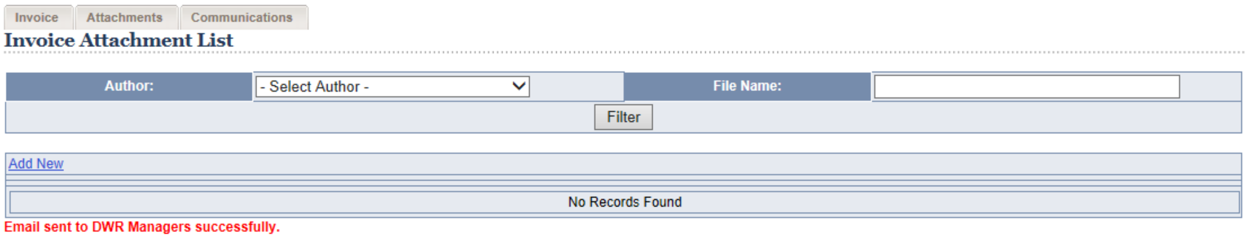


If you decide to make your attachment private then only DWR staff will be able to view the attachment. However, if you do not make the attachment private then everyone on your contract team will be able to see the attachment.

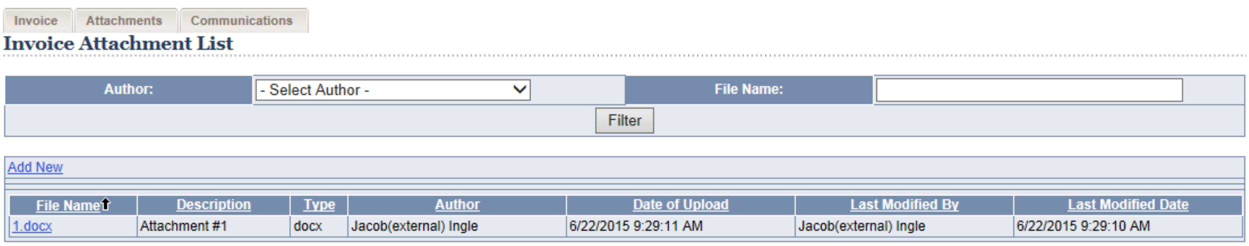
Once saved, attachments cannot be deleted or edited. Click the **OK** button when you see this message.



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

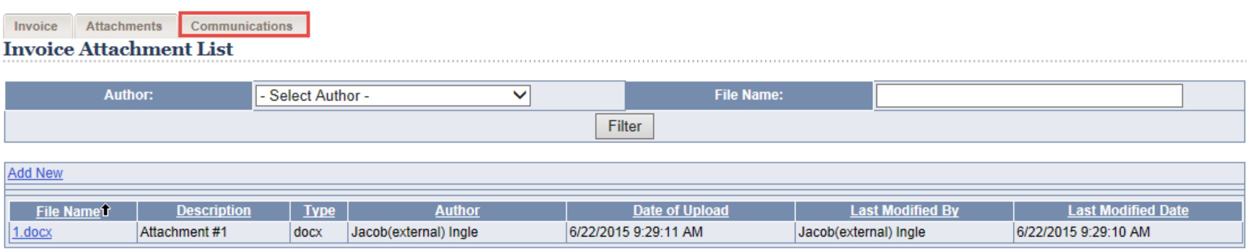


Refresh the page to verify that your attachment has been uploaded.



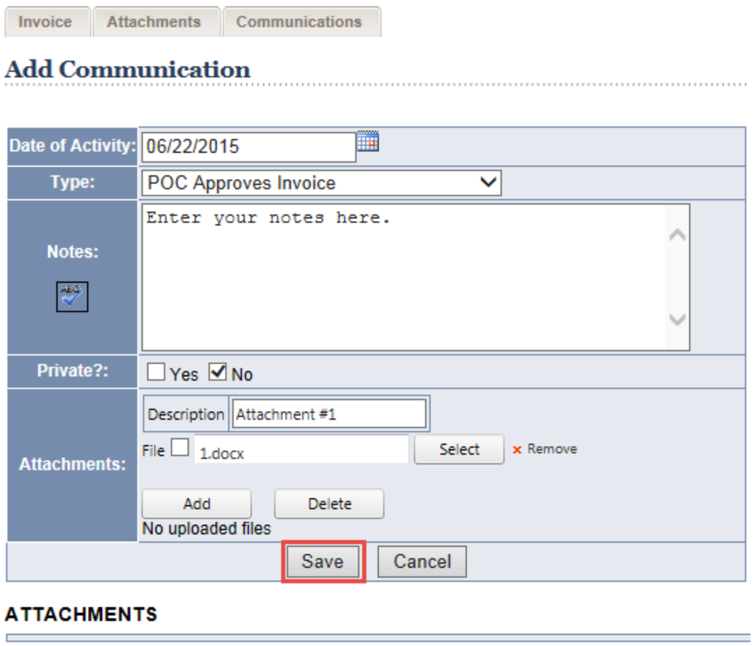
C. Invoice Communications

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



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

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.

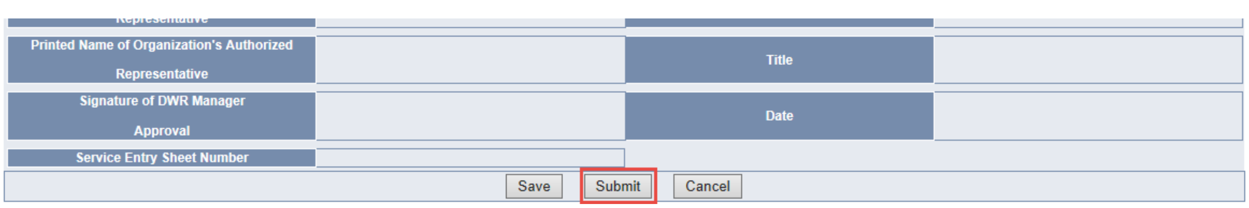


Regarding the **Private?** checkbox: If you check **Yes**, only DWR staff will be able to view this communication. Checking **No** allows everyone on the contract team to see the note and attachments.

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

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.



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.