

GRANT NOTES

Use Grant Notes to track internal Grantor communication and external correspondence with Grant Recipients.

Grant Notes have:

- Assigned categories
- Note text
- Optional attachments

To add a Grant Note:

1. Search for a grant project from the “Grants List” screen.

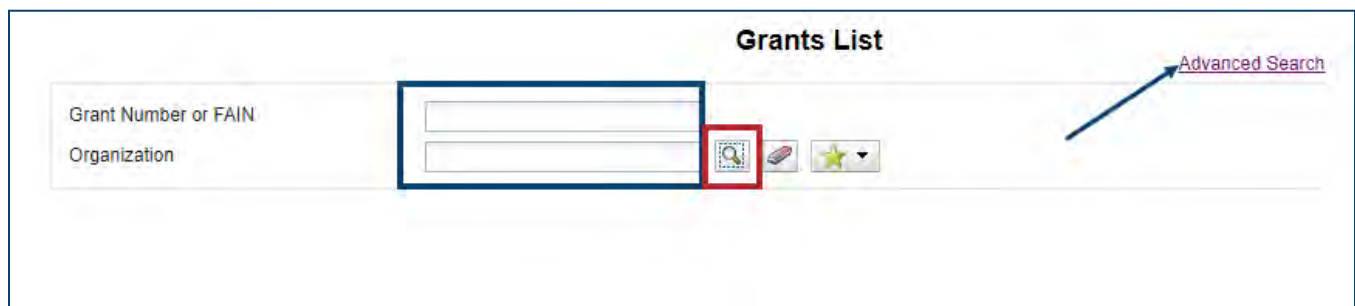


Figure 205: Grants List screen – Search fields and button and Advanced Search link

The Results table displays. From the *Actions* column, click the **Grant Notes** icon.



50 100 150 200 1000						
Grant Number	2 ▾	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
			03/21/2016	10/23/2020	Multiple Amendments In-Progress	 

Figure 206: Grants List Screen – Grant Notes icon

The “Grant Notes” screen displays.

Grant Notes

Grant Number
Grantee Name
Project Start Date 07/10/2010
Project End Date 07/01/2020

Grant Note Create Date From To
Grant Note Type --All--
Grant Note Category --All--
Author --All--
Subject
☒ Hide Automatic Notes

Add Search

Total 2 notes

Subject	Category	Grant Note Type	Author	Date	Support Year	Application Number	Bulk Notes	Action
Purpose	Purpose	Internal		11/01/2011 00:00 (GMT -04:56) EDT	1	-0000	No	
Description	Description	Internal		11/01/2011 00:00 (GMT -04:56) EDT	1	-0000	No	

Add Cancel

Has Attachment
 Edit Note
 Delete Note
 View Note

Figure 207: Grant Notes screen

The top portion of the screen contains the grant project information:

- Grant Number
- Grantee (Grant Recipient) Name
- Project Start and End Date

The middle section contains search fields to locate specific existing Grant Notes.

The search fields are:

- Grant Note Create Date: From and To dates
- Grant Note Type: Internal or Correspondence
- Grant Note Category: Predefined by the Business Analyst and DOI
- Author: Name of the user who created the Grant Note
- Subject: Grant Note subject
- Hide Automatic Notes: The GMM automatically generates workflow notes (hidden by default)

Under the search section, is the Add and Search buttons.

The screenshot displays the 'Grant Notes' interface. At the top, the title 'Grant Notes' is in bold. Below it, a section contains project details: 'Grant Number' (blurred), 'Grantee Name' (blurred), 'Project Start Date' (05/01/2007), and 'Project End Date' (09/30/2020). A horizontal line separates this from the search section. The search section includes: 'Grant Note Create Date' with 'From' and 'To' date pickers; 'Grant Note Type' with a dropdown menu showing '--All--'; 'Grant Note Category' with a dropdown menu showing '--All--'; 'Author' with a dropdown menu showing '--All--'; 'Subject' with a text input field; and 'Hide Automatic Notes' with a checked checkbox. At the bottom of the search section are two buttons: 'Add' and 'Search'.

Figure 208: Grant Notes Screen

The table on the Grant Notes screen displays all notes/attachments associated with the grant project.

Total 18 notes 1 2 [Next]

Subject	Category	Grant Note Type	Author	Date	Support Year	Application Number	Bulk Notes	Action
GMS Award Rev Docs	Financial Information	Internal		08/09/2019 15:15 (GMT -04:56) EDT	3	Application # Grant #	No	
corrected_FY19 Technical Review	Funding Packet Information	Internal		05/29/2019 00:10 (GMT -04:56) EDT	3		No	
CAN Allocation Table adjusted \$1	Funding Packet Information	Internal		05/21/2019 15:45 (GMT -04:56) EDT	3		Yes	

Figure 209: Grants Notes Screen – Results table

- Click the **Add** button.

Grant Notes

Grant Number
Grantee Name
Project Start Date 05/01/2007
Project End Date 09/30/2020

Grant Note Create Date From To
Grant Note Type --All--
Grant Note Category --All--
Author --All--
Subject
☒ Hide Automatic Notes

Figure 210: Grant Notes Screen – Add button

3. The “Grant Notes-Add” screen displays. Enter required information in the fields with an asterisk.

Note: The author’s name, pre-populates.

Grant Notes - Add

Author: [Pre-populated]

Subject * [Text Field]

Note Type * ? ☐ Correspondence ☒ Internal

Category Type * [Dropdown: - Please select -]

Notes * ?
(Limit to 2000 characters) [Text Area]

Note Attachments

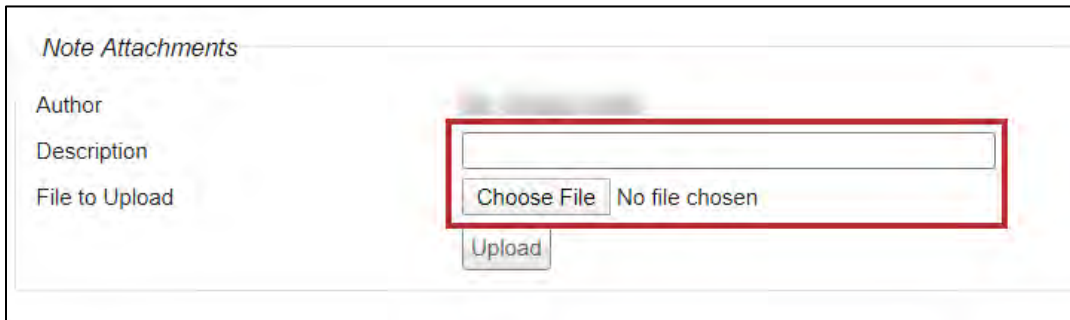
Figure 211: Grant Notes - Add Screen

The fields are as follows:

- Subject: Enter the subject of the note. Conform to any naming conventions set by DOI
- Note Type: Correspondence or Internal Radio buttons
- Internal (only visible to Grantor)
- Correspondence (visible to Grantor and Recipient – the Recipient will receive an email with a link to log in and view the note)
- Category Type: A pre-set list of categories. To add or remove custom categories for a grant program, please contact a DOI Partner Success Anal
- Notes: Text field (limit of 2000 characters)

Optional: To add an attachment:

1. Enter a required file **Description**.
2. Click the **Choose File** button to select a file from computer.



The screenshot shows a form titled "Note Attachments". It has three input fields: "Author", "Description", and "File to Upload". The "Description" field is highlighted with a red box. Below the "File to Upload" field, there is a "Choose File" button and a "No file chosen" text. Below the "Choose File" button is an "Upload" button.

Figure 212: Grant Notes - Add Screen – Description field and Choose File button

3. Choose a file to attach.

The file name displays next to the *Choose File* button.

4. Click the **Upload** button.



The screenshot shows the same "Note Attachments" form. The "Description" field now contains the text "Sample Document". The "File to Upload" field now contains the text "Test doc.docx" next to the "Choose File" button. The "Upload" button is highlighted with a red box. A blue arrow points to the "Test doc.docx" text.

Figure 213: Grant Notes - Add Screen – Filename and Upload button

The file displays in the attachments table. The status column initially states pending while performing a virus scan. Once complete, the status updates to Successful.

5. When done, click the **Submit** button.

The screenshot shows the 'Grant Notes - Add' screen. At the top, there are fields for Author, Subject (Site Visit), Note Type (Internal selected), Category Type (Site Visit Report), and Notes (Please see attachment). Below this is the 'Note Attachments' section with fields for Author, Description, and File to Upload (Choose File, No file chosen, Upload). At the bottom, there is a table with columns: Description, Source Attachments, Status, and Actions. The table contains one row: Sample Document, Test doc.docx, PENDING. The Actions column has icons for Edit or Delete Attachment. A red box highlights the Submit button at the bottom left. A blue arrow points from the word 'Attachment' to the table row. Another blue arrow points from the table row to the Submit button.

Description	Source Attachments	Status	Actions
Sample Document	Test doc.docx	PENDING	Edit or Delete Attachment

Figure 214: Grant Notes - Add screen – Submit button

Note: The option to edit (spiral note pad with a pencil icon) and delete (trash icon) an attachment is available.

Once a note is submitted, it is viewable at any time.

Important: Only the author of a note can see the edit or delete icons.

Note: Grantors and Grant Recipients only receive email notifications for Correspondence Notes. When users receive Correspondence Notes email notifications, they must log into the GrantSolutions GMM to view the Grant Note.