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.

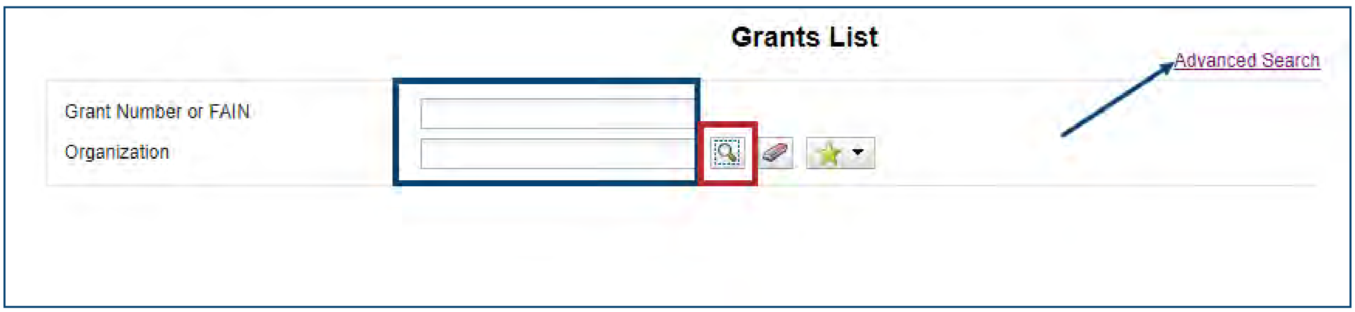

Figure 205: Grants List screen – Search fields and button and Advanced Search link

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

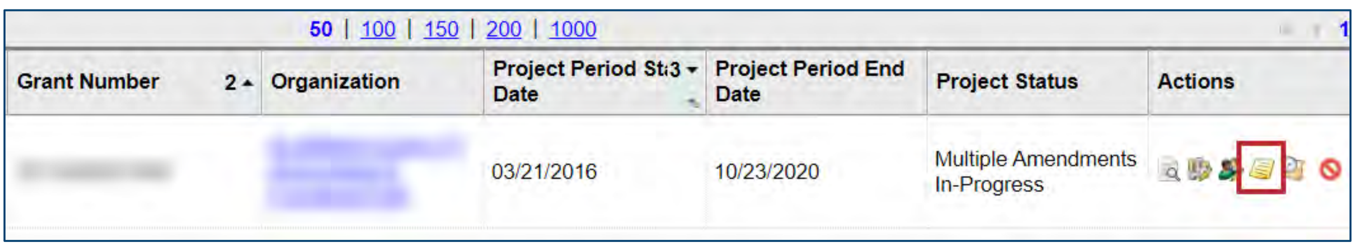

Figure 206: Grants List Screen – Grant Notes icon

The “Grant Notes” screen displays.

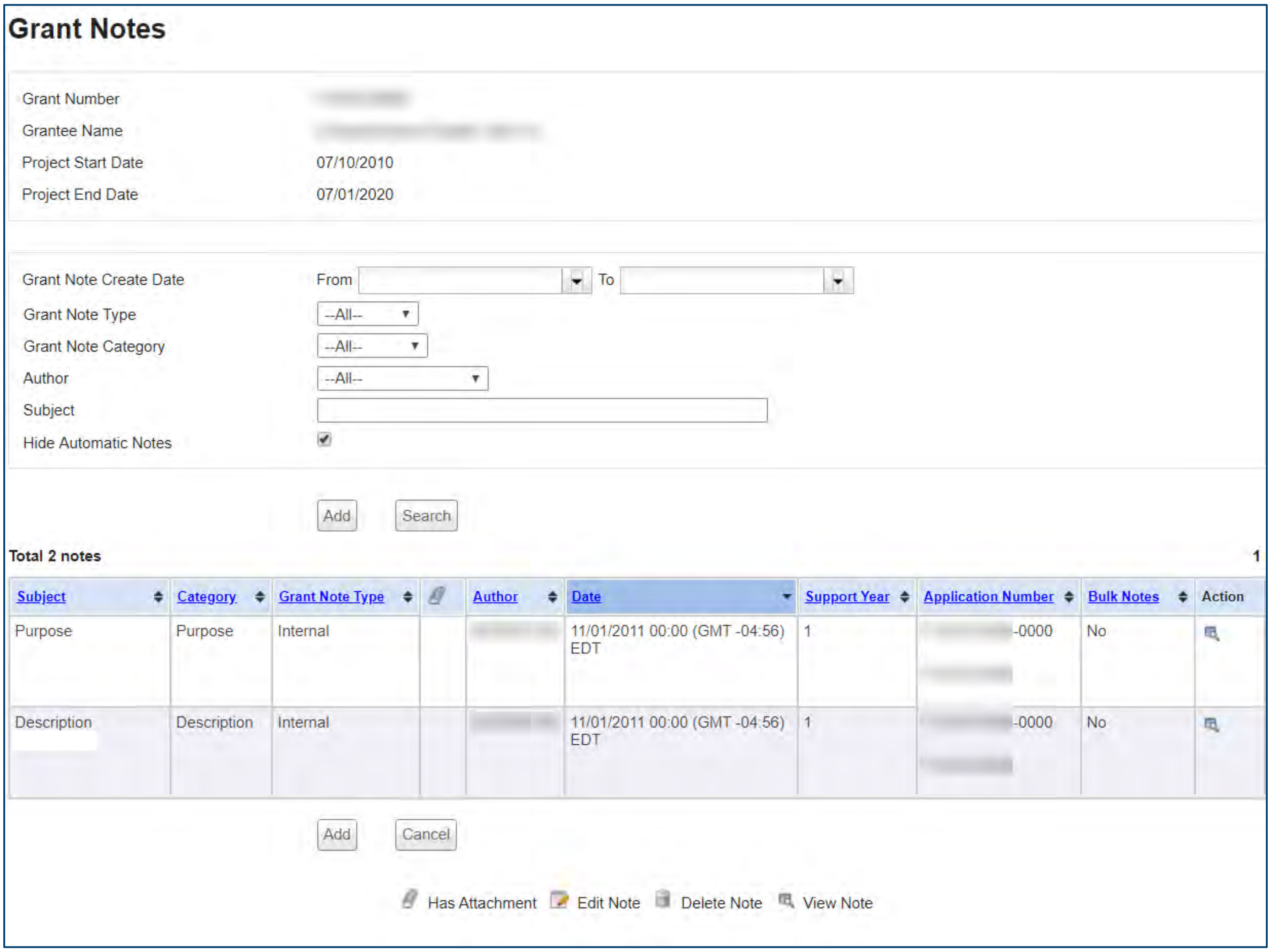

Figure 207: Grant Notes screen

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.

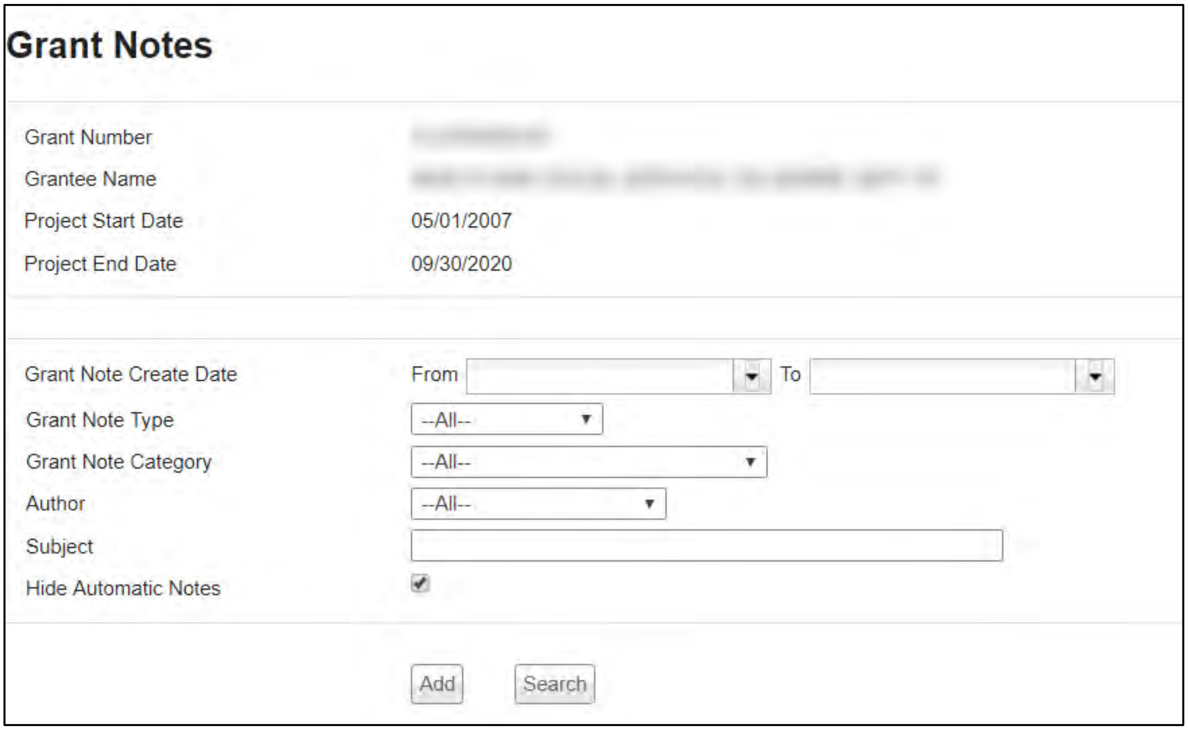

Figure 208: Grant Notes Screen

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

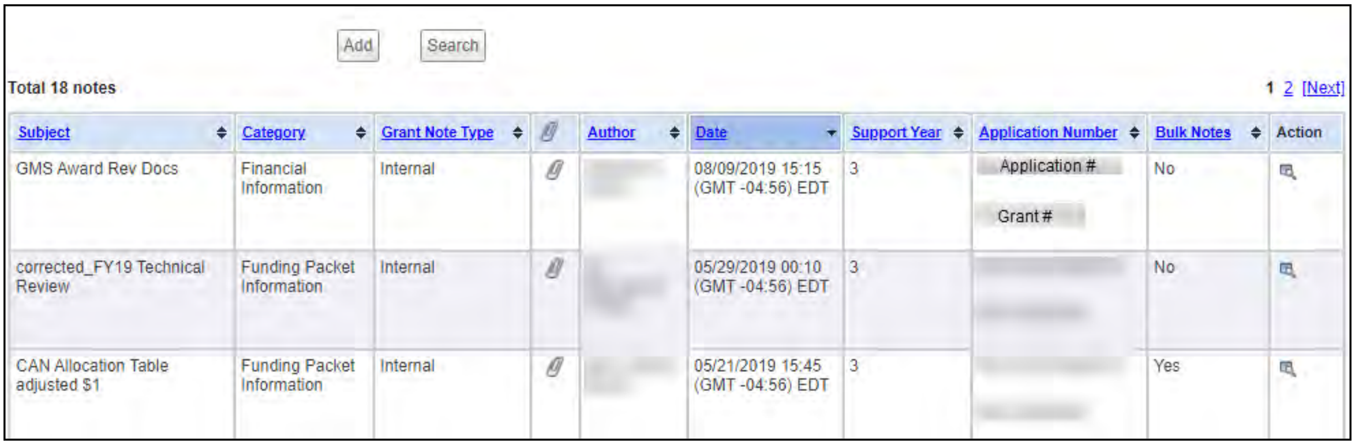

Figure 209: Grants Notes Screen – Results table

2. Click the **Add** button.

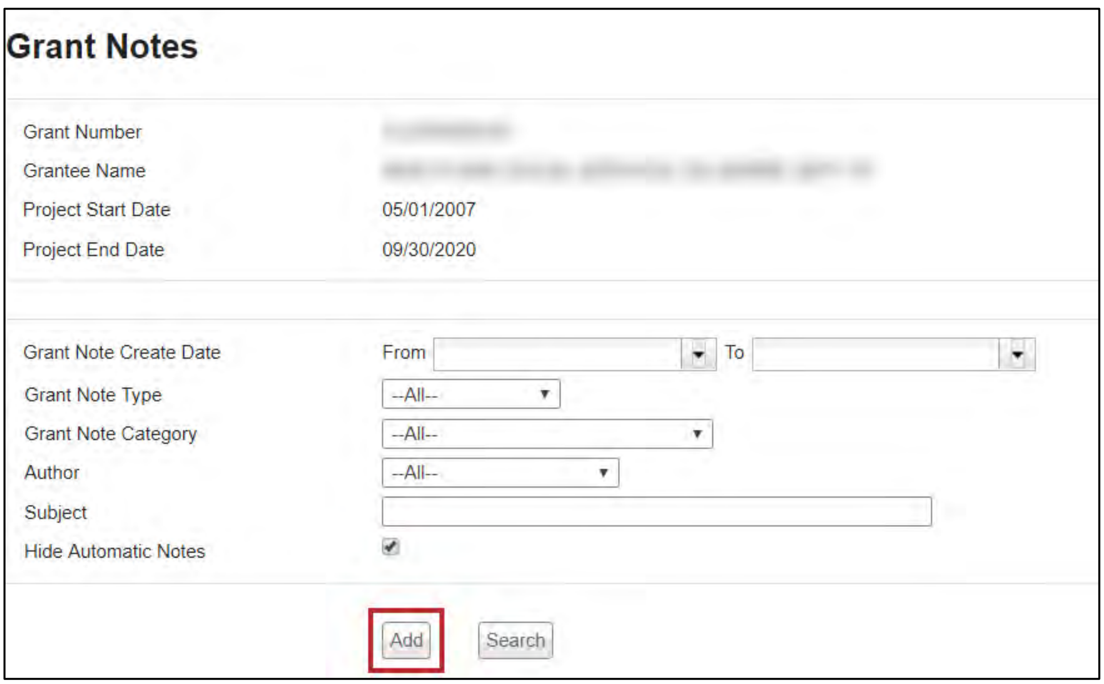

Figure 210: Grant Notes Screen – Add button

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

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

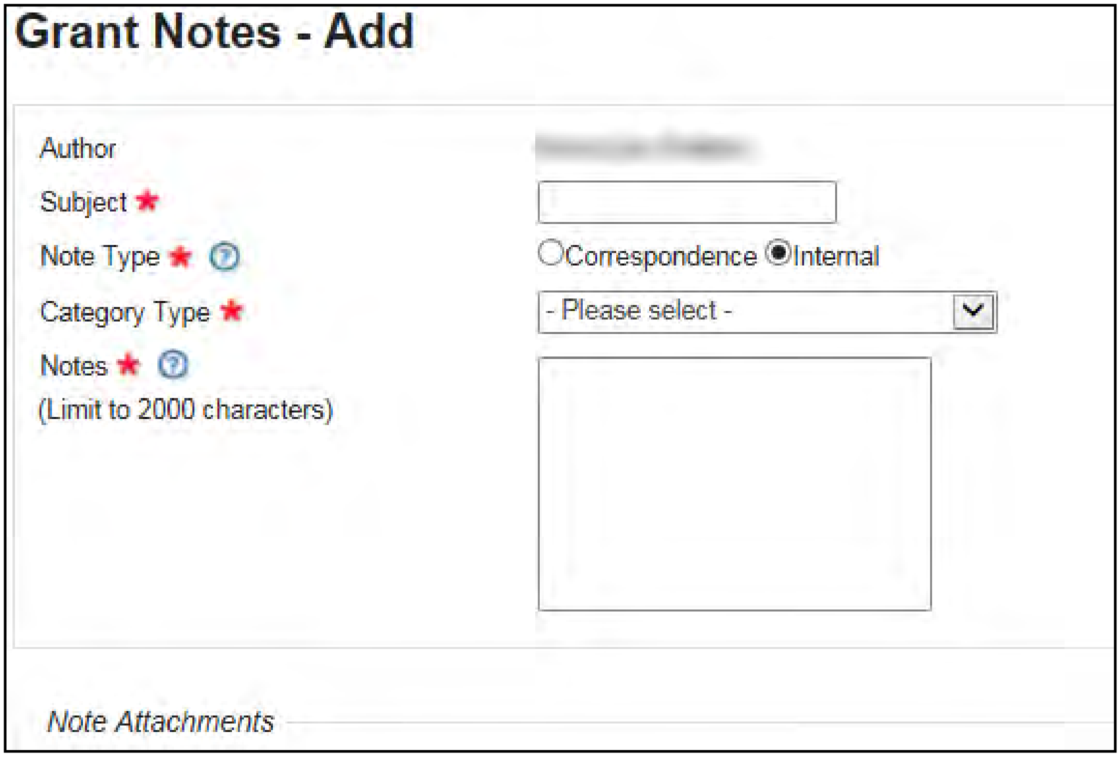

Figure 211: Grant Notes - Add Screen

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.

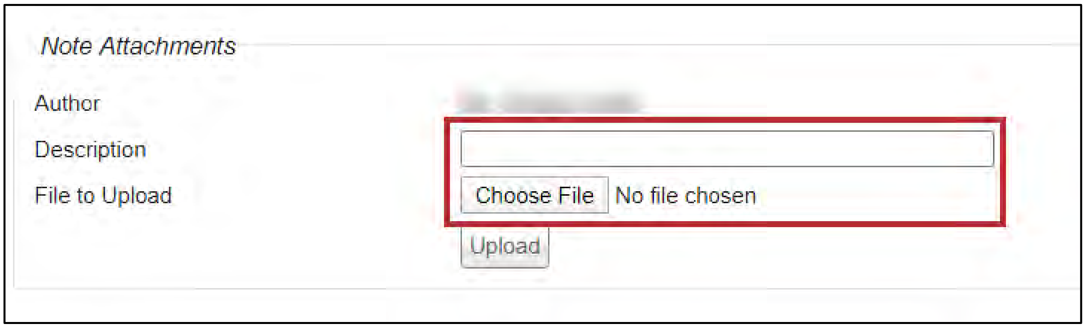

Figure 212: Grant Notes - Add Screen – Description field and Choose File button

3. Choose a file to attach.

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

4. Click the **Upload** button.

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.

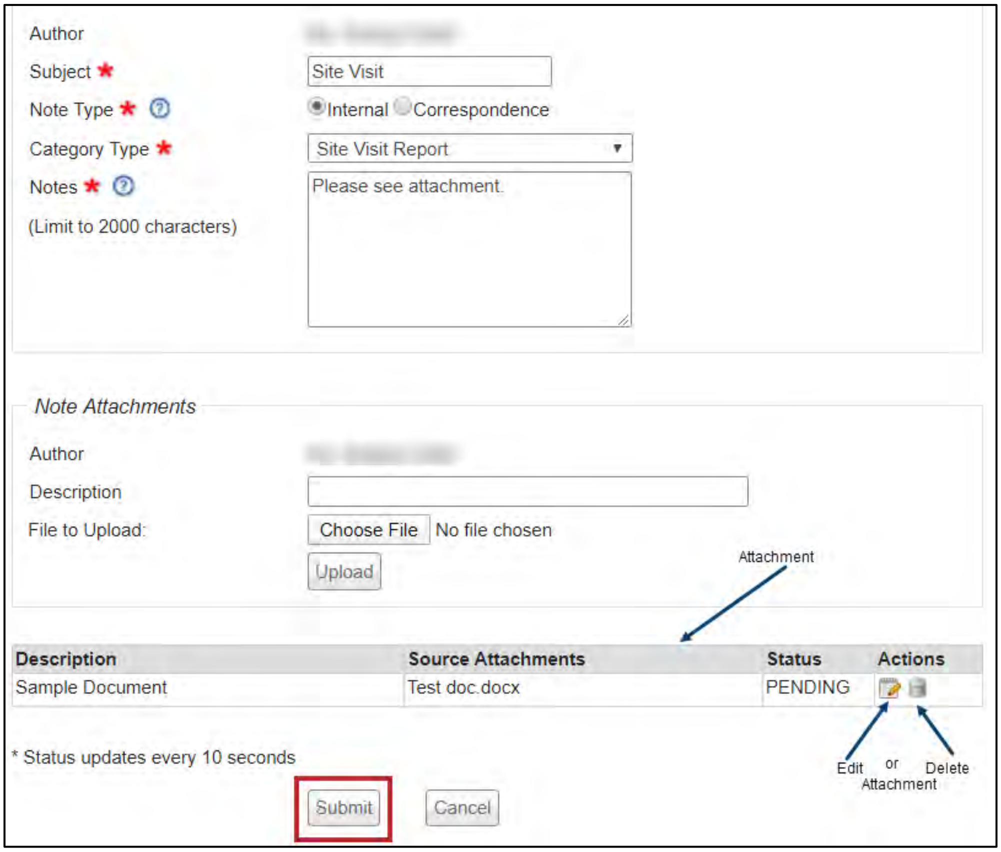

Figure 214: Grant Notes - Add screen – Submit button

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.