

## GrantSolutions Grants Management Navigation and Menu Bar

### OBJECTIVES

At the end of this lesson, the user will be able to:

- Identify elements of the GrantSolutions GMM screen, including the menu bar, links, and footer
- Use the menu bar to access various screens in the system
- Launch GrantSolutions Business Intelligence (BI) Dashboards
- Launch GrantSolutions Recipient Insight

### NAVIGATION

After logging into the GrantSolutions GMM, the landing page is the “Grants List” screen. Each GrantSolutions GMM screen contains the main menu bar, footer, access to the user’s profile and a link to log out of the system.

#### Username Link

1. Click the **Username** link above the menu bar to access the “Profile Update” screen.

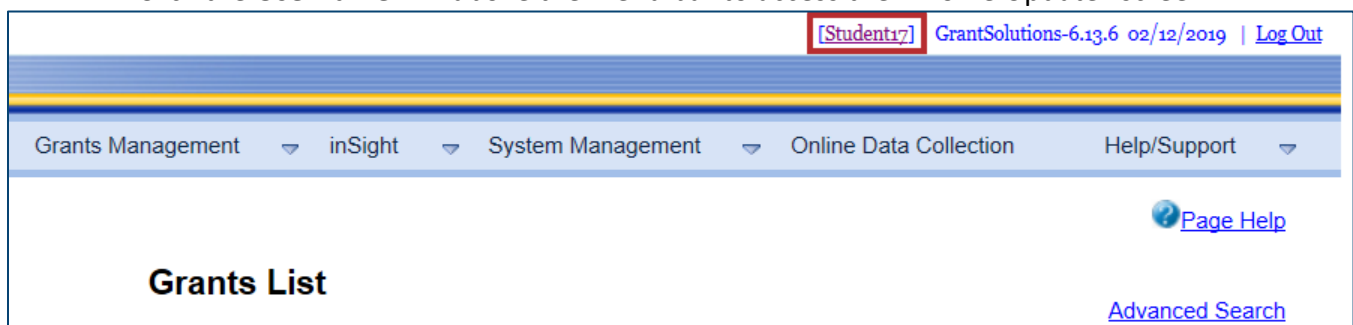


Figure 86: Grants List screen - Username link

2. The “Profile Update for” screen appears. Make any desired changes and click the **Save** button.

**Profile Update for**

★ indicates a required field.

Prefix ★: Mr. (dropdown)  
If other, specify:

Position Title ★: Program Support

Work Phone ★: 301-111-1111

Fax:

Mobile:

Carrier(Carrier charges may apply): Select one (dropdown) [Test SMS]

Other Phone:

Email ★: Jane.Doe@email.gov

**Primary Address Information**

Division/Department:

Country ★: UNITED STATES (dropdown)

Street Address ★:

Mail Stop:

City ★:

State ★:

County:

Zip Code ★:

[Save] [Cancel]

Figure 87: “Profile Update for” screen

**Tip:** Another place a user can access the *Profile Update for* is from the GMM menu bar by selecting **System Management > Account Management > Update Profile**.

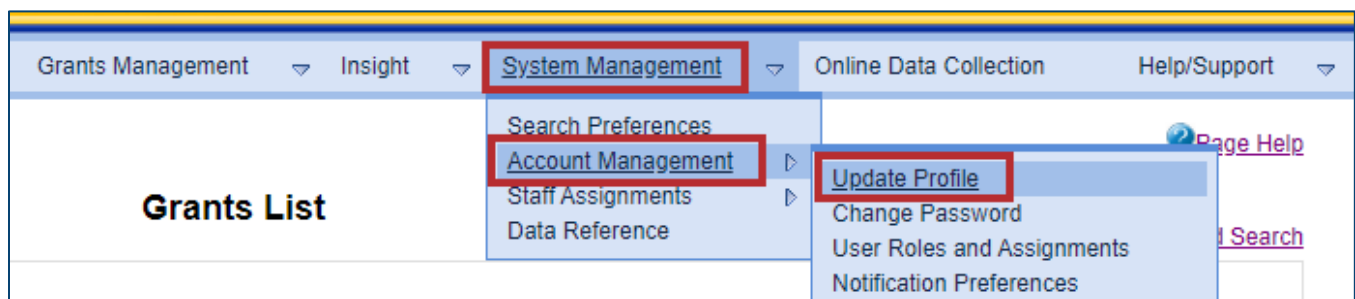


Figure 88: GMM Menu Bar – System Management > Account Management > Update Profile

**Note:** Ensure contact information is up to date.

## Log Out Link

1. Click the **Log Out** link in the top right corner of the screen to properly exit the system.

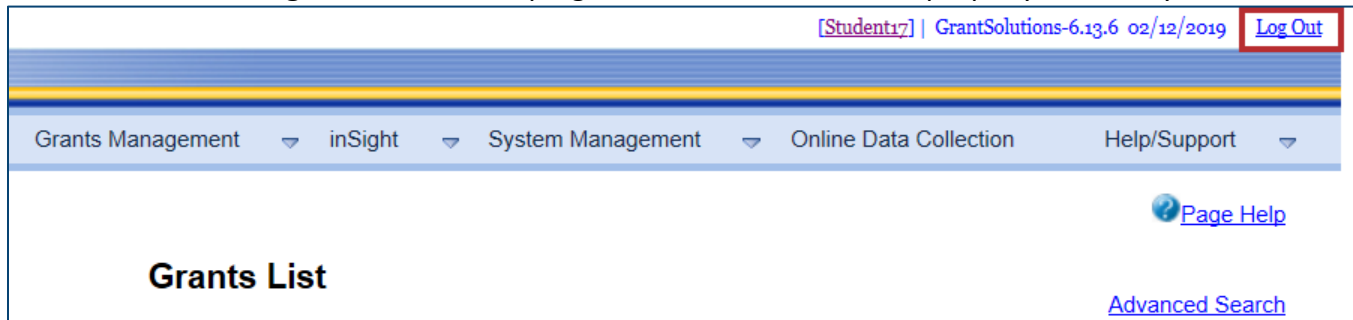


Figure 89: "Grants List" screen - Log Out link

**Note:** For Grantor agencies that use Portal, to log out of GrantSolutions GMM

2. Click the **Back** link.

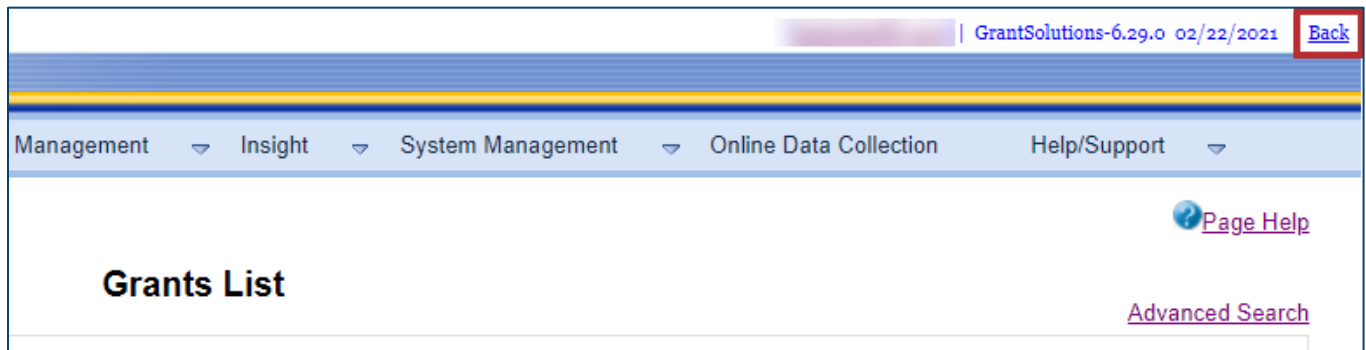


Figure 90: GMM Header – Back link

3. From the Portal menu bar, click **Username > Log Out**.

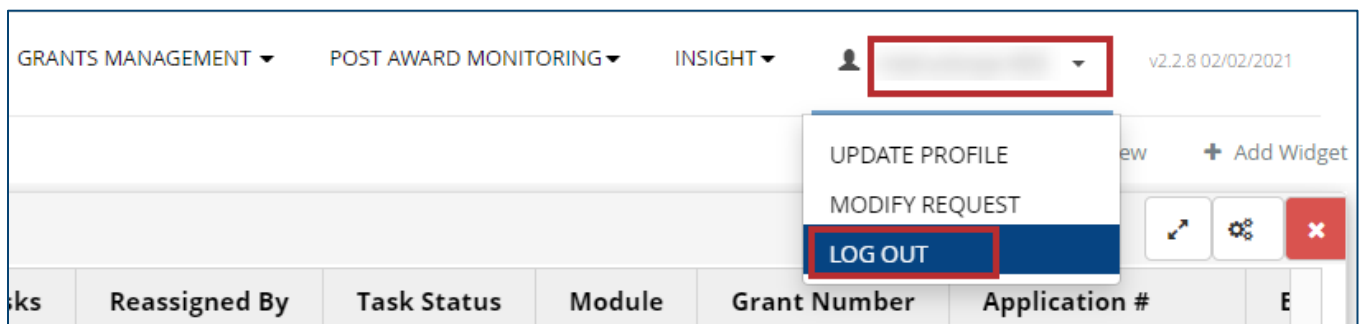


Figure 91: Portal screen – Log out

## GrantSolutions Footer

The GrantSolutions GMM footer contains the following information and links:

- GrantSolutions User Support contact information
- A hyperlink to the GrantSolutions Contact Us screen
- The Web Accessibility policy
- The Privacy and Security Notice
- The Freedom of Information Act website
- Disclaimers

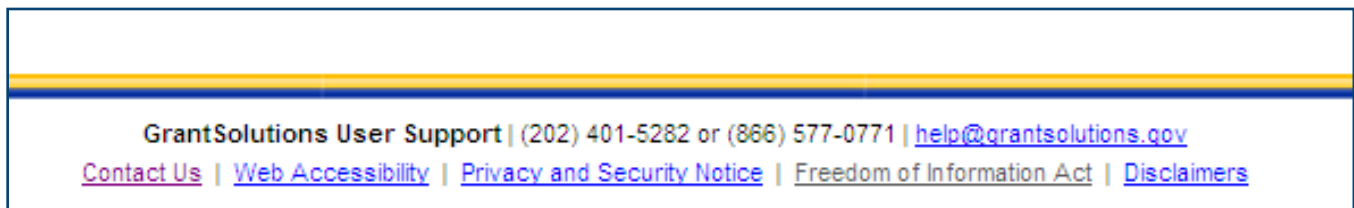


Figure 92: GrantSolutions footer

## GMM MENU BAR

The GrantSolutions GMM menu bar is located at the top of each screen and provides menu options to navigate the system.

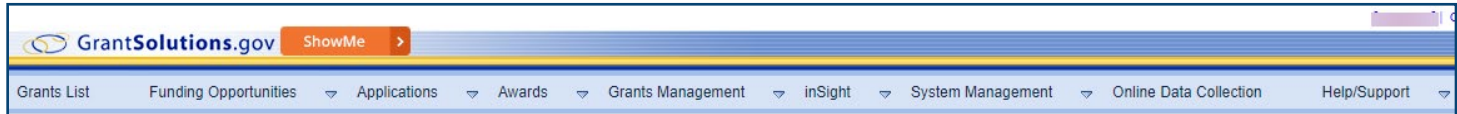


Figure 93: GrantSolutions GMM Menu bar

Use the mouse or keyboard to expand each menu item.

The Menu Options available are:

Grants List – navigates a user to the Grants List screen which houses all grants that have been awarded in GrantSolutions



Figure 94: GMM Menu bar - Grants List menu option

Funding Opportunities – provides a list of options for managing Announcements, Application Kits, and Financial Accounts.

Main Menu	Sub Menu	Tertiary Menu	Description
<b>Funding Opportunities</b>			
	Announcements		
		Manage Announcements	Search for or create announcements and funding opportunities
		Close Announcements	Close announcements (set end dates) for funding opportunities
	Application Kits		
		Program Enclosures	View or manage Program Enclosures
		Grant Enclosures	View or manage Grant Enclosures
		Application Kit Templates	Responsible staff sets up requirements for applications
	Funds Planning		
		Manage Funds Planning	Create and establish parameters for financial accounts by grant program
		Manage Financial Accounts	Add, transfer, or track funds within financial accounts
	Manage Commitments for FOA		Manage commitments associated with its Announcements title

Table 1: Funding Opportunities menu options

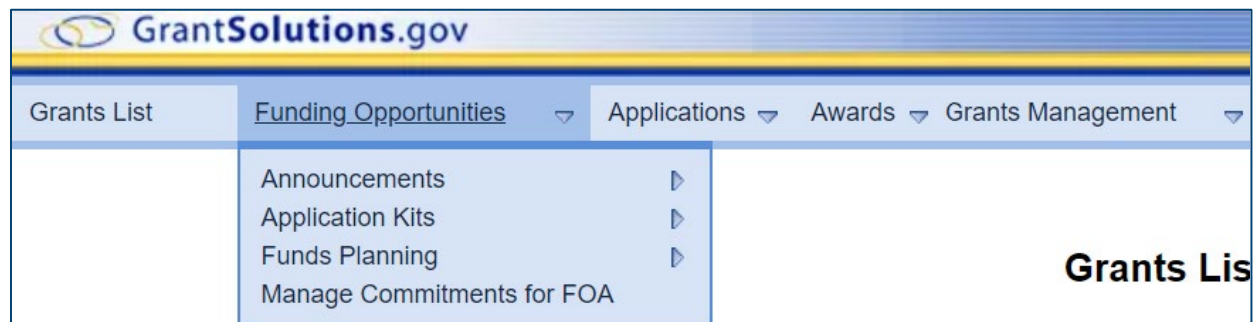


Figure 95: Funding Opportunities drop-down list

Applications – provides a list of options to receive, screen, review, and recommend a funding amount for applications as well as view statistics on potential applicants in GrantSolutions Recipient Insight

Main Menu	Sub Menu	Description
<b>Applications</b>		
	Application Receipt Log	Repository of applications accepted from the Grants.gov Log Application screen, manually log, or submitted via GrantSolutions GMM.
	Application Screening	Search for eligible and ineligible applications. Intake and Business Reviews can be viewed or completed from this screen.
	Application Recommendation	Screen, score, select recommended decision, and recommended funding for submitted applications
	Funding Memo	Funding decision for application process
	Amendments	Search the number of active amendments for per Grant Program
	Grants.gov	Login to accept or reject applications from Grants.gov within GrantSolutions
	Recipient Insight	This tool brings together key data about applicants/recipient organizations from multiple external sources to one place for easy review and analysis

Table 2: Applications menu options

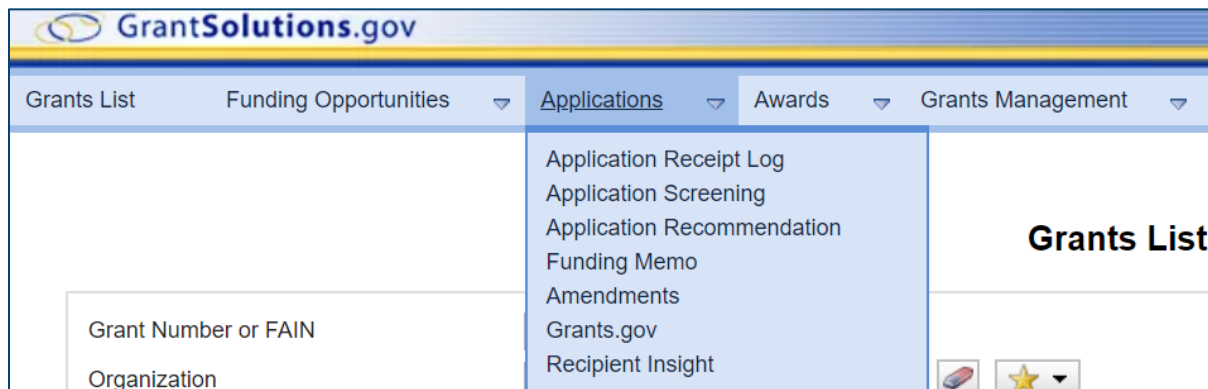


Figure 96: Application drop-down list

Awards – provides a list of options to prepare the award for issuance, create Terms and Conditions templates, and view statistics on potential applicants in GrantSolutions Recipient Insight

Main Menu	Sub Menu	Tertiary Menu	Description
<b>Awards</b>			
	Award Processing		Further process actions leading to an awarded grant
	Funding Memo		Funding decision for application process (same as Funding Memo from the Applications menu)
	Issue Not Funded Notice		Prepare not funded form letters and issue the not funded notices for pre-award applications.
	NGA Components		
		Manage NGA Components	View, create, update, and delete global Notice of Grant Award components for a grant program.
		Manage NGA Templates	Create, edit, and remove Notice of Grant Award Templates.
	Recipient Insight		This tool brings together key data about applicants/recipient organizations from multiple external sources to one place for easy review and analysis

Table 3: Awards menu options

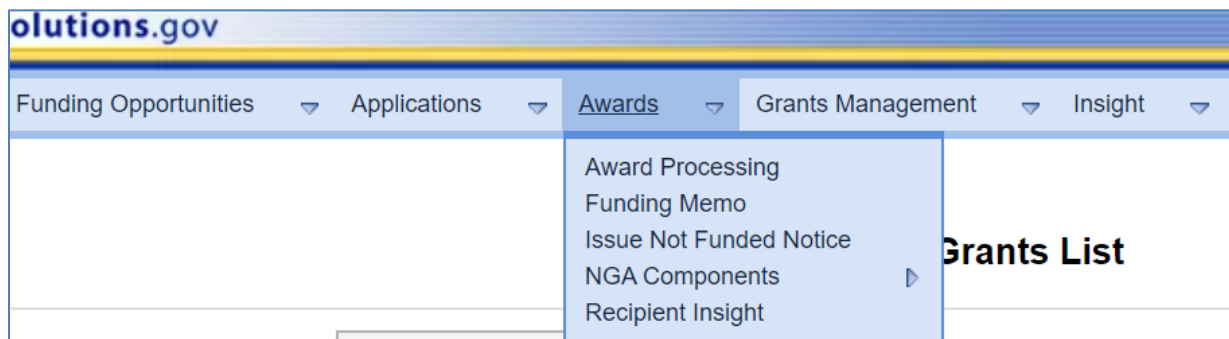


Figure 97: Awards drop-down list



Grants Management – provides a list of options to manage post-award monitoring and to view statistics on potential applicants in GrantSolutions Recipient Insight

Main Menu	Sub Menu	Tertiary Menu	Description
<b>Grants Management</b>			
	Grant Portfolio		
		Amendments	Amendments Report screen – create a mini Amendments report based on search criteria. The report contains total amendments for a grant program, number of Amendments for the criteria entered, and total grants with active Amendments displayed.
		Grant Notes	Grant Notes List screen
		Track Terms & Conditions	Search for Terms and Conditions based on Grant Program and other criteria.
		Rescind Expanded Authority	Search by Grant Program and other criteria to view Grants that may or may not have expanded authority.
		Non-Competing Application Kits Management	Manage Non-Competing Continuation Kits
		Assign Grantee Task	Create Bulk Tasks screen
	Manage Reports		Activate PPR/FFR reporting for Grantees, view submitted reports, accept reports, or submit reports on behalf of grantee
	Post Award Actions		
		Post Award Actions Management	Edit, manage, or adjust amendment types at the partner level
		Post Award Action Kit Management	Establish kits for each type of amendment
	Project Assessment		Grantors can create quantitative or qualitative assessment questionnaires to measure key

			performance indicators of grant projects or applications
	Property Management		Allows a Grantor to track real property from the initial purchase to disposition
	Closeout		Access to the Closeout Module
	Recipient Insight		This tool brings together key data about applicants/recipient organizations from multiple external sources to one place for easy review and analysis

Table 4: Grants Management menu options



Figure 98: Grants Management drop-down list

Insight – provides a list of options to access GrantSolutions Business Intelligence reports and Recipient Insight

Main Menu	Sub Menu	Description
<b>Insight</b>		
	BI Dashboards	Develop meaningful analytics with a focus on outcomes. Particularly helpful for the Program Office
	Recipient Insight	This tool brings together key data about applicants/recipient organizations from multiple external sources to one place for easy review and analysis

Figure 99

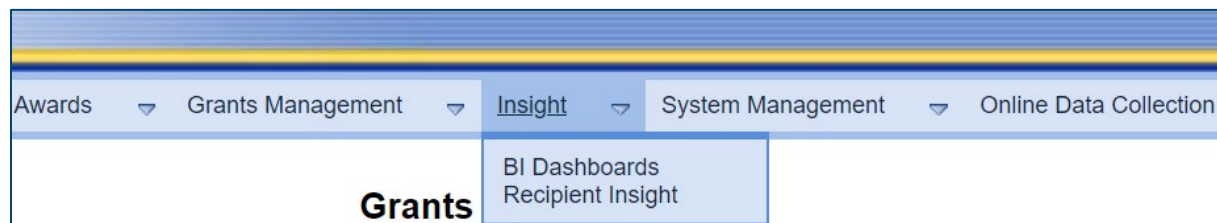
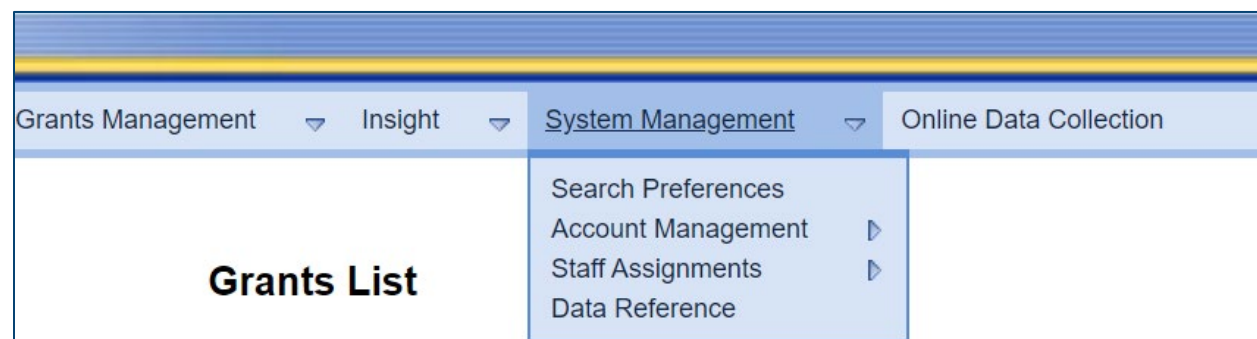


Figure 100: Insight drop-down list

System Management – provides a list of options to manage account settings

Main Menu	Sub Menu	Tertiary Menu	Description
<b>System Management</b>			
	Search Preferences		Set project categories available in a search
	Account Management		
		Update Profile	User can edit their own information
		Change Password	User can manually change their own password
		User Roles and Assignments	User can view their roles and assignments
		Notification Preferences	User can set which notifications they choose to receive from a pre-defined list
	Staff Assignments		
		Program Office	Program Office Assignment List
		Grants Office	Grant Office Assignment List
	Data Reference		Look Up Table Maintenance for CFDA codes. Add, Edit, or Delete CFDA numbers.
	Partner Award Letter		View or add new award letter templates
	Project Assignments (Beta)		

Table 5: System Management menu options



Grants Management ▼	Insight ▼	<u>System Management</u> ▼	Online Data Collection
<b>Grants List</b>		Search Preferences	
		Account Management ▶	
		Staff Assignments ▶	
		Data Reference	

Figure 101: System Management drop-down list

Online Data Collection – (For Grantors that use it) Online collection of reports and other program-specific data from the Grant Recipient for the Grantor.

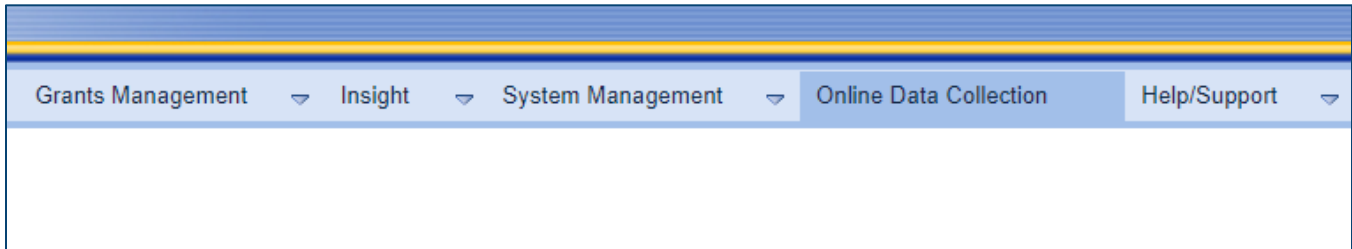


Figure 102: Online Data Collection menu option

Help/Support – provides access to the Grantor Support site which includes Release Notes, GMM User Manuals, quick sheets, topic guides, and videos on how to use the system

Main Menu	Sub Menu	Description
<b>Help Support</b>		
	Documentation	Link to the Grantor support site containing quick sheets, guides, and videos for GrantSolutions users

Table 6: Help/Support menu option

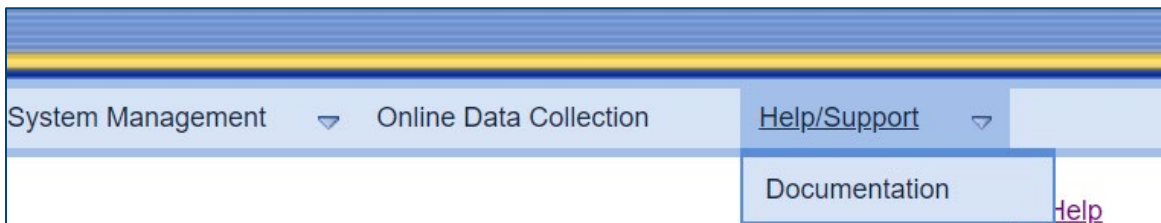


Figure 103: Help/Support drop-down list