

## Quick Sheet: Introduction to GrantSolutions Portal Screen

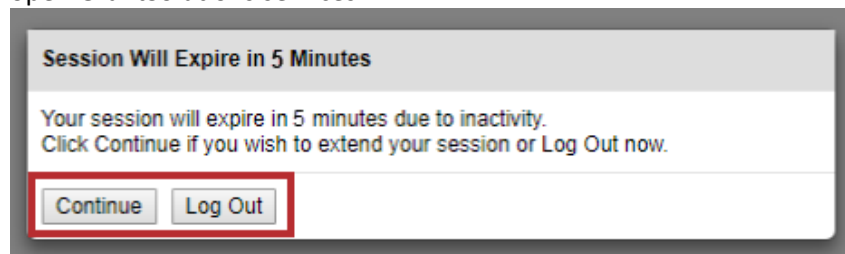
**Audience:** GrantSolutions Grantors

### INTRODUCTION

Welcome to “Portal,” a GrantSolutions landing page that is accessible to Federal Agencies that have enabled the feature. When enabled, the “Portal” screen allows users to access most GrantSolutions modules from one location after logging in.

**Note:** After 25 minutes of inactivity in GrantSolutions modules, users receive a timeout warning message (pictured below). To extend the session and continue working, click the **Continue** button. To exit GrantSolutions, click the **Log Out** button.

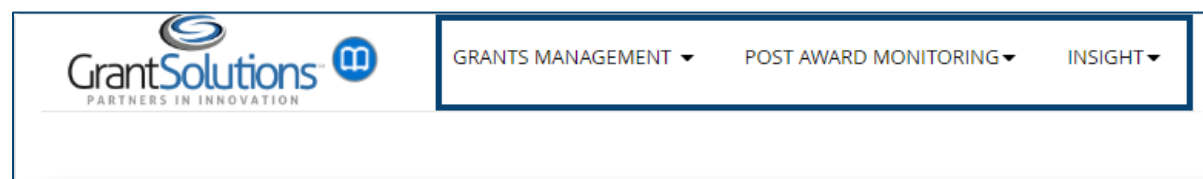
If a user clicks the Log Out button from the warning message, it will automatically log the user out of all open GrantSolutions services.



### NAVIGATION

1. Log into GrantSolutions with a Username and Password ([www.grantsolutions.gov](http://www.grantsolutions.gov)).
2. The “Portal” screen appears. Launch desired modules by selecting from the drop-down lists on the Each “Portal” menu bar.

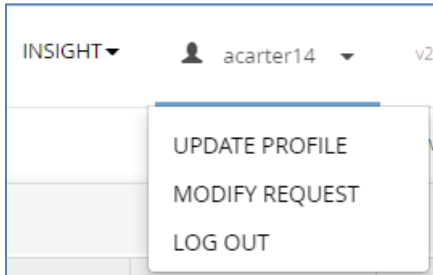
**Note:** Each module opens in a new browser tab and the “Portal” screen remains available for further use.



**Note:** The Portal menu bar options and modules available for selection are based on a user’s permissions, and may include:

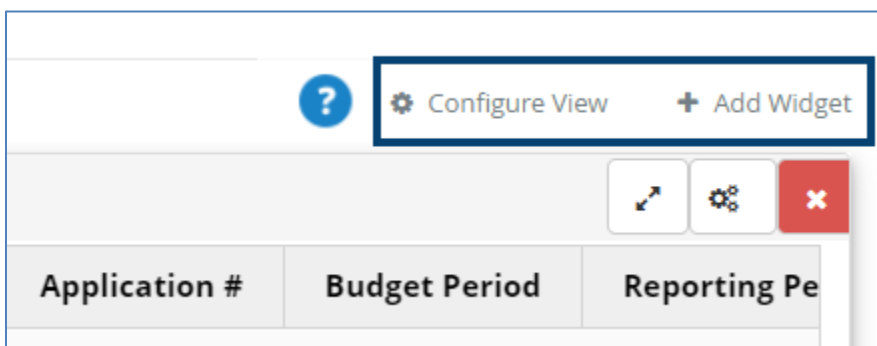
- *Announcement Module (AM):* Click **Announcement > AM**
- *Grants Management Module (GMM):* Click **Grants Management > Discretionary**
- *OLDC (Online Data Collection – also known as inForm):* Click **Post Award Monitoring > OLDC**
- *Project Assessment:* Click **Post Award Monitoring > Project Assessment**
- *Business Intelligence (BI):* Click **Insight > BI Dashboards**

- To update information or log out of GrantSolutions, click the **username** drop-down arrow from the menu bar.



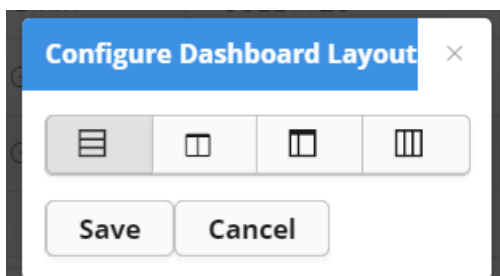
## SCREEN SETTINGS

The *Configure View* and *Add Widget* links allow users to control the screen layout and the widgets that appear on the “Portal” screen.



To change the layout of the “Portal” screen:

- Click the **Configure View** link.
- The “Configure Dashboard Layout” pop-up window opens. Select one of the four layout options and click the **Save** button.

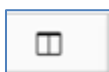


The four layout options available are:

Single Column



Two Even Columns



Two Uneven Columns

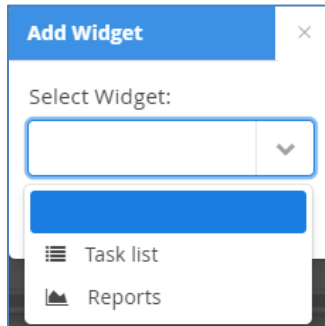


Three Columns



To add one or more widgets to the “Portal” screen:

1. Click the **+ Add Widget** link.
2. The “Add Widget” pop-up window opens. Select the desired widget(s).



**Note:** Additional Portal widgets are slated for a future release.

#### WIDGET SETTINGS

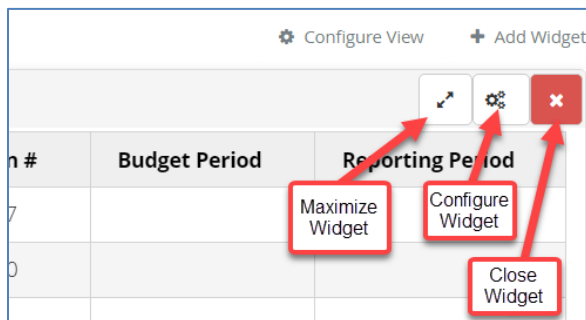
1. To enlarge the view to full screen, click the **Maximize Widget** icon.
2. To modify a widget, click the **Configure Widget** icon.

For example, the Task List widget provides the following options:

- *Column Options:* Determine which columns to show or hide
- *Sorting Options:* Sort tasks in ascending or descending order by Module, Task Description, Budget Period, Report Period, Application #, or Grant Number
- *Filter Options:* Task Status (Open or Completed) and Module (GMM or OLDC)

3. To remove a widget from the page, click the **Close Widget** icon.


**Note:** Widgets can be added back to the page by clicking the **Add Widget** link.



## TASK LIST

The *Task List* widget allows users to easily track and navigate to assigned tasks. The *Task List* contains assignments awaiting action. Currently, GrantSolutions GMM and OLDC (inForm) tasks appear on the *Task List*. OLDC tasks are sent to all users with authority to perform the action. GMM tasks only appear on the *Task List* if the user has the Primary Project Assignment for the project and the authority to perform the action.

TASK LIST							
<input type="checkbox"/>	Task Description	Task Status	Module	Grant Number	Application #	Budget Period	Report
<input type="checkbox"/>	<a href="#">Create Funding Memo for 90EF0083</a>	Open	GMM	90EF0083	EF16000077		
<input type="checkbox"/>	<a href="#">Approve Funding Memo 90EE1120</a>	Open	GMM	90EE1120	EE16001580		
<input type="checkbox"/>	<a href="#">Approve Funding Memo 90EI0703</a>	Open	GMM	90EI0703	EI15000861		
<input type="checkbox"/>	<a href="#">Create Funding Memo for 90EI0703</a>	Open	GMM	90EI0703	11EI283883		

Show 10 tasks per page. Page 1 of 1. Total 4 tasks. << < > >> 

GMM tasks are generated for the following actions:


- Funding Memo
- Award Processing
- Commitment Accounting
- Application Receipt Log and Application Recommendation

## TASK LIST ICONS

Export Icon

Allows users to export tasks to an Excel spreadsheet.

TASK LIST					
<input type="checkbox"/>	Task Description	Task Status	Module	Grant Num	
<input type="checkbox"/>	<a href="#">Award A 01-00 is In Review</a>	Open	GMM	AED	

Show 10 tasks per page. Page 1 of 1. Total 1 tasks. << < > >> 

### Reassign Tasks Icon

Users with the appropriate authority can reassign their tasks to another user within their office and with appropriate permissions. The reassignment does not change the GMM Primary Assignment for the Project, only the user assigned to the specific task.

TASK LIST					
<input checked="" type="checkbox"/>	Task Description	Reassigned By	Task Status	Module	Grant
<input checked="" type="checkbox"/>	Award AED17CABM01-00 is In Revi...		Open	GMM	AED17
<div> Show 10 tasks per page. Page 1 of 1. Total 1 tasks. </div>					

When the newly assigned user logs into GrantSolutions, the task is visible in their *Portal Task List*.

TASK LIST				
<input type="checkbox"/>	Task Description	Reassigned By	Reassignment End Da...	Tas
<input type="checkbox"/>	Award AED17CABM01-00 is In Review (Assigned by: )	Smith, John	10/20/2016	Op

### Return Icon

Once a task is reassigned, the original assignee cannot pull back the assignment. However, the new assignee can reassign the task back to the original assignee.

TASK LIST			
<input type="checkbox"/>	Task Description	Reassigned By	Task Status
<input checked="" type="checkbox"/>	Award AED17CABM01-00 is In Review (Assigned by: )	Smith, John	Open
<input type="checkbox"/>	Award AED17CABM01-00 is In Review	History	Open
<div> Show 10 tasks per page. Page 1 of 1. Total 2 tasks. </div>			

## Change Task Priority Icon

Users can prioritize tasks within their *Task List* (ex: Low, Medium, High). By default, all tasks are set to Medium priority. Users can change the priority for multiple tasks at one time.

TASK LIST						
<input checked="" type="checkbox"/>	Task Description	Grant Number	Application #	Budget Period	Reporting Period	Priority
<input checked="" type="checkbox"/>	Award AED-11-00000-01-00 is In Review	EDE-11-00000-01-00	AED-11-00000-01-00	1		Medium
Show	10	tasks per page. Page 1 of 1. Total 1 tasks.		<<	<	>