

eGrants User Manual

Table of Contents

Introduction	3
Purpose	3
Scope	3
Accessing eGrants	3
Access Levels	3
Read only	3
Modify	3
How to get Access	3
Links to Access eGrants	6
eGrants Interface	7
Skip Repetitive Navigation Links	7
Logo	7
eGrants Tab	8
Search Request	8
Search Options	8
By Full Grant Number	8
By Serial Number with IC	8
By Only Serial Number	8
Grant Information Display	8
Specific Grant Folder	8
Signs	9
Project Title	9
PI Name	9
Program Code	9
By Package	9
By Year	9

Report Error.....	10
Upload/Replace Document	10
Upload/Replace via email	10
Add Document.....	11
Add Document from eGrants main page.....	11
Create Grant Year	11
Add Document from selected grant number	12
Add document via email	12
Switch to Update Mode	13
Store.....	13
Store Selected	13
Modify/Route.....	13
Delete.....	13
Restore.....	14
Switch to Read Only Mode	14
eGrants Footer Notes.....	14
Institutional Files.....	14
Funding Docs.....	14
Privacy Policy	14
PDF Reader.....	14
Best Practice.....	14
Icon Help	14
Accession.....	14
Management	15

Introduction

eGrants application use was initiated by NCI in 1996 as a replacement for a microfiche system which at that time served as the backup for the Grant Application paper files. The primary function of eGrants is to convert Grant Application documents to indexed electronic images and provide authorized users online access to those documents. Over the years, with enhancements to eGrants and the implementation of other new systems, NCI's Office of Grants Administration (OGA) has become able to perform its functions with little or no access to paper Grant Application documents.

Purpose

The eGrants application was developed and extended in its functionality to provide support for tracking the paper Grant Application folders and the transfer of those folders after close-out to the Federal Records Center.

Scope

eGrants use is not limited to NCI. Over the years many other NIH institutes have elected to utilize eGrants. Only minor adjustments are needed to make eGrants meet the needs of an institute. This tailoring is primarily in the areas of document Category sets, Authorization, document sources and linkages; access to options including what document imagery and index data can be changed.

Accessing eGrants

A user can access to eGrants using NIH log in credentials.

Access Levels

There are two levels of access for eGrants users.


Read only

Read only permission for funded and unfunded grants.

Modify

Read, upload/replace and add document permissions.

How to get Access

eGrants authenticates user's access to application through Active directory and keeps control and record of the access level through Access Control functionality. OGA Management determines a level of access for a user and controls it through eGrants Admin Tab. This  tab is available only to OGA Admin Roles. To add new user click on Admin tab and get a menu option list.

Menu Option

Select eGrants Access Control option from the **Menu Option** drop down box

eGrants Access Control

[Add New](#)

Index for Last Name: **Null A B C D E F G H I J K L M N O P Q R S T U V W X Y Z**

Status:

* Tab Name Index: E=egrants; M=Mangement; D=Docman; C=Contract File Tracking; A=Admin;

Edit	Status	User Name	Userid	Position	E*	M*	D*	C*	A*
	<input checked="" type="checkbox"/>	Abel, Donna	AbelD	Program Staff	y	n	n	n	n
	<input checked="" type="checkbox"/>	Adamson, Kristin	adamsonk	Program Staff	y	n	n	n	n
	<input checked="" type="checkbox"/>	Adjei, Brenda	adjeiba	Program Staff	y	n	n	n	n
	<input checked="" type="checkbox"/>	Adolphus, Shawn	adolphusc	Specialist	y	y	n	n	n
	<input checked="" type="checkbox"/>	Agarwal, Rajeev	agarwalraj	Program Staff	y	n	n	n	n
	<input checked="" type="checkbox"/>	Agelli, Maria	agellim	Program Staff	y	n	n	n	n

To add new user click on [Add New](#) this will open a new window to enter user information.

eGrants Access Control_add new

User List

* Tab Name Index: E=egrants; M=Mangement; D=Docman; C=Contract File Tracking; A=Admin;

Userid:
Status:

User Name: (First name, Last name)

Display Tabs:
☐ E*
 ☐ M*
 ☐ D*
 ☐ C*
 ☐ A*

Position Type:

Fill in the boxes for **User id** and **User Name** select **status** Active from the drop down menu and check the box for specific permission from **Display Tabs** option E is for eGrants, M for Management, D for Docman, C for Contract file tracking, A for Admin. Select **position type** from dropdown list;

Position Type:

Program Staff
Specialist
Team Leader
Branch Chief
Funding Operator or Quality Inspector
Deputy Director
Director
Egrants Developer

Select an option according to user's role and click on

Add New User's Information

To check a newly added user or already existing one click on **User List** it will display a list of users and an index list for user last name that makes easy to get information for a specific user by clicking on the last name initial.

Index for Last Name: Null A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

*** Tab Name Index:** E=egrants; M=Mangement; D=Docman; C=Contract File Tracking; A=Admin;

Tab Name Index is a description of E, M, D, C and A tabs which is required to be granted to a user based upon need.

Status:

There are three options to check a specific status Active, Inactive or all select an option from the Status

Status: Active

drop down box. If A is selected from the Index for last name and it will display the information about all users having last names with an initial of A for Active Status as following;

Edit	Status	User Name	Userid	Position	E*	M*	D*	C*	A*
	<input checked="" type="checkbox"/>	Abel, Donna	AbelD	Program Staff	y	n	n	n	n

This information displays a status of access to a specific resource, in this case user has active status for E (eGrants). Y is for Yes and n for No.

Status: **Inactive** ▼

If the Status is selected Inactive it will display the information like following

Edit	Status	User Name	Userid	Position	E*	M*	D*	C*	A*
		Aamodt, Roger	AamodtR	Program Staff	n	n	n	n	n

This user does not have access to any of the resource that's why there is n under E, M, D, C, A.

Status: **All** ▼



Status All displays information about both Active and Inactive.

To update user access level click on Edit  icon and a new window will pop up with user's information.

eGrants Access Control_update

User List

* Tab Name Index: E=egrants; M=Mangement; D=Docman; C=Contract File Tracking; A=Admin;

Userid:	<input type="text" value="AbelD"/>	Status:	Active ▼
User Name:	<input type="text" value="Abel, Donna"/> (First name, Last name)		
Display Tabs:	<input checked="" type="checkbox"/> E* <input type="checkbox"/> M* <input type="checkbox"/> D* <input type="checkbox"/> C* <input type="checkbox"/> A*		
Position Type:	<input type="text" value="Program Staff"/> ▼	<input type="button" value="Update User's Information"/>	

Select a check box for required access from the Display Tabs option and change status if it needs to be changed then click on  button the access level will be updated.

Links to Access eGrants

<https://i2e.nci.nih.gov/egrants/>

<https://egrants.nci.nih.gov/>


<https://i2e.nci.nih.gov/egrants/egrants.asp>

<https://i2e.nci.nih.gov/workbench/WorkbenchView>

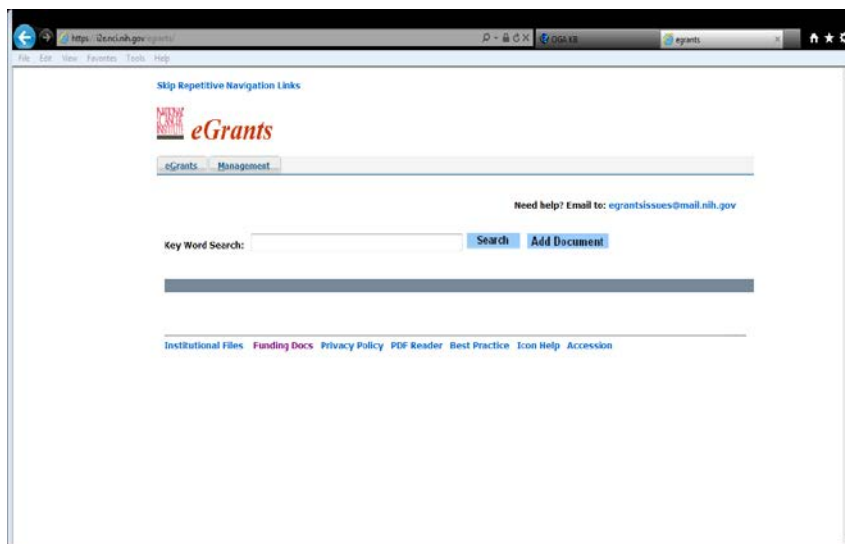
From Workbench under Links Heading choose eGrants for Web Applications and click on Go it will open the eGrants Application.

<https://ccrod.cancer.gov/confluence/pages/viewpage.action?pageId=63996798>

Only OGA staff can access through confluence page by clicking on eGrants heading from the left side Menu list.

GPMATS also has a link for eGrants if you click on the little icon  in front of the grant number in GPMATS it will open the eGrants application where you can check the saved documents for that grant.

eGrants Interface



Skip Repetitive Navigation Links

This is just a message to show the main content and skip the navigation links eGrants users please do not pay attention to it.

Logo



National Cancer Institute and eGrants logo.

eGrants Tab

Users having access to read and upload to eGrants will have only this Tab. Below this tab is a main page of eGrants.

Search Request

This is a most common used part of the application where user can perform a search for grant's related documents.

Search Options

There are three options to perform a search for specific grant by Full Grant Number, only Serial Number and Serial Number with IC.

By Full Grant Number

Search by full grant number like this sample number 0R01CA123456-00W0 will display the results for that grant. The more specific entry for the grant number would return the more restrictive results for that grant.

By Serial Number with IC

CA123456 Searching grant number with institution name would return the results for that specific institute.


By Only Serial Number

123456 search by only serial number will result the information including other IC's.

Grant Information Display

 CA009111	 
Project Title:	VIRAL ONCOLOGY TRAINING GRANT
PI Name:	BRYAN R. CULLEN, DUKE UNIVERSITY
Program Code:	4DTR
By Package:	All Application Award Correspondence Closeout
By Year:	60 56 34 33 32 31A2© 31A1© 31© 30 29S1 29 28 27 26© 25 24 23 22 21A1© 20 19 18 17 16A1©

Specific Grant Folder

 **CA009111** Grant Folder icon with specific grant number as a result of search criteria will be displayed.

Signs

In front of that grant number if there is any sign please read the information about that sign



Read Stop Notice



Locate Physical File



Tobacco related Grant



Replace Document



Indicating Recovery Act Grant



Report Problem with Document



This File is available in electronic form only



Competing years are identified with this sign

Project Title

Name of the project for that specific grant will be displayed here.

VIRAL ONCOLOGY TRAINING GRANT

PI Name

Program investigator's name for that grant shows here.

BRYAN R. CULLEN, DUKE UNIVERSITY

Program Code

Program Code like **4DAT**

By Package

[All](#) [Application](#) [Award](#) [Correspondence](#) [Closeout](#)

Documents will be displayed about that grant number by package heading or if you want to see all documents just click on [All](#)

By Year

[60](#) [56](#) [34](#) [33](#) [32](#) [31A2©](#) [31A1©](#) [31©](#) [30](#) [29S1](#) [29](#) [28](#) [27](#) [26©](#)

If you want to see documents for specific grant year click on that number and it will display the saved documents for that year with document name, saved date and count of pages.


Report Error

Document ▼	Date ▼	Page Count	Report Error
Award File	07/16/10		Report Error
Award File	07/16/10		Report Error

If you notice any error with that document like wrong Grant, bad Image or incorrect Identification click on Report Error and type the error message. This document will be routed to quality control team to check the error.


Upload/Replace Document

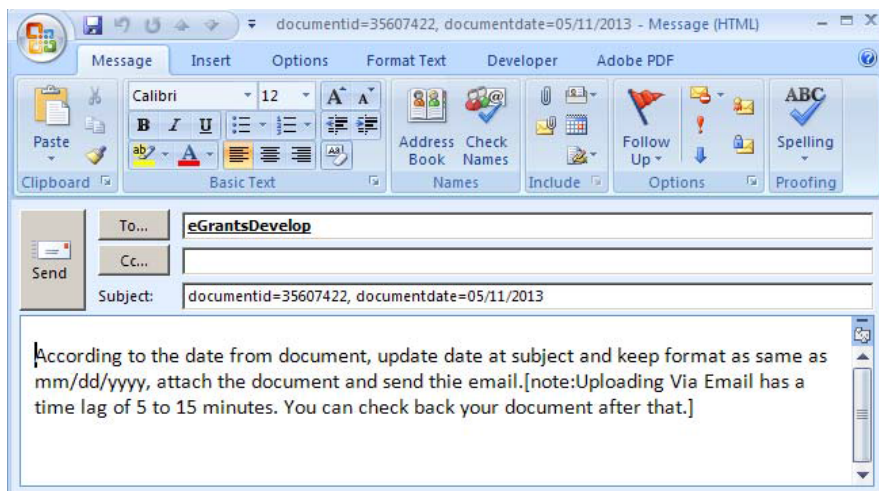
Document ▼	Date ▼	Page Count	Report Error / Upload
Award File	07/16/10		Report Error 

If you want to replace selected document click on upload icon  and replace the document with existing one.

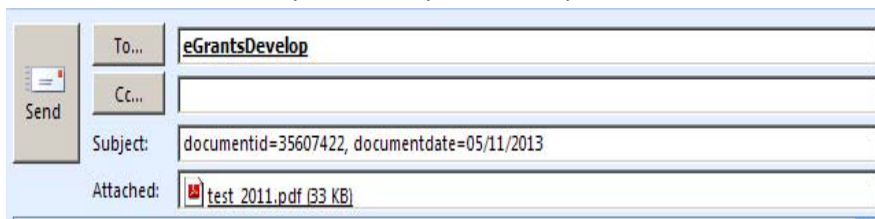
Upload/Replace via email

Cancer Center Data	07/10/2013	To Report Error	 
Application File	07/05/2013	To Report Error	 

If you want to replace a document by email click on the envelope icon  in front of that document you will get an outlook new email window with pre populated subject line as shown below



Attach file that is already saved on your desktop and click on send.



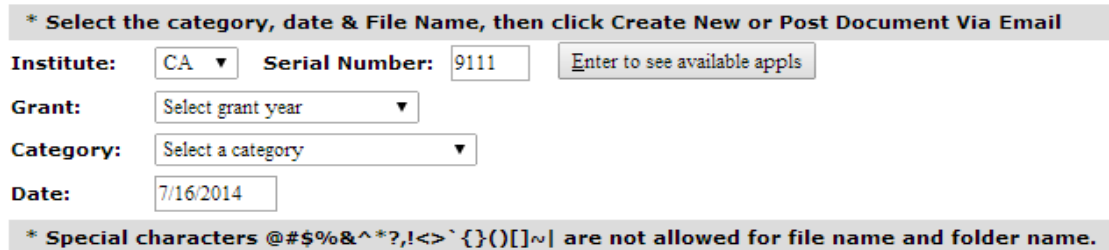
Add Document

There are three options to add documents, adding from eGrants main page, adding through selected grant number and adding by email.

Add Document from eGrants main page

To add document click on **Add Document** and get a new screen as following;

Create New Document Profile: NCI
Message: Some browsers require an updated version of [Java Plug-in](#) to be installed
[\[Help: New Applet Certificate\]](#)



On this screen you will also get a message "Java needs your permission to run" select Run.

If the grant number is described on the previous page this will auto generate the specific serial number here. You can click on **Enter to see available appls** tab to refresh the list of available Grant years and select year from The **Grant** drop down list or if you want to create a New Year select that option. Select Category of that document from the **Category** drop down list. Select a document that is already saved on your machine or network and click on **Create New**.

Create Grant Year

This option is available under **Grant** drop down list by selecting this option a new window pop ups like the following;

Create Grant Year

*** This page is designed to force entry of apps that can not be found in IMPAC.**

Type: Activity Code: CA09111

Year: Suffix Code:

Following grant years are already created for CA9111:

5T32CA009111-97test
5T32CA009111-97SUPP

Select **Type** and **Activity Code** from the drop down lists fill the boxes of **Year** and **Suffix Code** as desired and click on . **New Year** for that specific grant number will be created. At the bottom of this screen you can see already created grant years.

Add Document from selected grant number

5T32CA009111-56

Document	Date	Page
Award File	07/16/10	

By clicking on you will find the same window as mentioned above the only difference is not to enter grant serial number because it's already selected but you still have to select **category** and select or create new grant year from the **Grant** drop down list.

Add document via email

By clicking on tab Create New Document window pops up and displays an option to [Post Document via Email](#) just click on this option, read the instructions "How to upload via email" given on that page as following;

Create New Document Profile: NCI

Message: Some browsers require an updated version of Java Plug-in to be installed

[\[Help: New Applet Certificate\]](#)

*** Select category, date & etc and press create**

Institute: CA Serial Number: 9111

Grant: 5t32CA009111-97tst2

Category: Application File

Date: 5/13/2013

File:

How to Upload Via Email?

- 1, Select grant year, category name and insert document date.
- 2, Click the button "Upload Via Email" and it will popup an outlook email window.
- 3, Just attach document (don't change the subject) and send.

[Post Document by web](#)

[Return](#)

Do not change email To, Subject and message fields just attach a document that is already saved on your desktop and send it. You can go back to previous page by clicking on [Return](#). Email function has a time lag of 5 to 15 minutes so wait for this time before checking the new added document.

Switch to Update Mode

Search

Add Document

Switch to Update Mode

Showing 16 document(s) in 1 grant(s)

Search for any grant number returns the values with switch to update mode except for those having read only permission. When you click on this option you will have more options for that document like these [Store](#) / [Store Selected](#) / [Modify/Route](#) / [Delete](#) and also there would be a name of resource that has saved the document.

Store

If you click on store the document will be stored.

Store Selected

This option is also to save the document but you have to select first.

Modify/Route


By selecting this option you can change Grant year, Category and Route it to QC or any of the specialist

Update Document Index Profile: NCI
Message: Some browsers require an updated version of Java Plug-In to be installed

* Select or type the information you want to change and press Update Index

Institute:	CA	Serial Number:	9111	Enter to see available appls
Grant:	5T32CA009111-96test			
Category:	Application File			
Date:	06/19/2013			
Route:	Store-Open to general use			Update Index / Route

Return

To update document index make changes to any field and click on  Index will be modified and if routed to someone it will be displayed under his queue.

Delete

Be careful to choose this option it will delete the document.

Restore

Only quality control management team has option to restore a deleted document.

Switch to Read Only Mode

Having permission for read only you can search for any grant number and read the documents related to that grant but cannot upload or add documents. With modify permission you will have an option to *Switch to Read-Only Mode* after making the required changes.

eGrants Footer Notes

Institutional Files

This is a link for Institutional files database. Files are saved with institution name in alphabetical order by clicking on the name you can read file about that institution. This database link is available to only NCI.

Funding Docs

This link is for master funding plan files and only document control management team has access to it. This is also available only for NCI.

Privacy Policy

This link is for eGrants privacy policy notice available to all institutes.

PDF Reader

This is a link for Adobe website from where you can install adobe reader in order to read PDF files.

Best Practice

This link is for a saved document with instructions to use adobe acrobat with eGrants. It is available to all institutes.

Icon Help

This link shows the icons with their definitions used in eGrants and it is also available to all institutes.

Accession

This is a link for inventory of paper files available to all institutes.

Management



eGrants

Management

[QC Assignment](#) / [Category Edit](#) / [Document Transaction Report](#) / [System Report](#)

QC Type and Assignment Report

- ☐ Automated QC--eGrants will only route the documents with error to QC.

QC Reason: Error

Assignment to:

- ☐ Full QC--eGrants will route documents to qc with several QC reasons.

Tab is available to quality control management team to upload, replace, add, modify, store, restore and rout documents.