Online Grants System

Ohio Office of Criminal Justice Services

GMS
Office of Criminal Justice Services
User Guide

April 2012

This user guide gives a general overview of GMS navigation. GMS is used by Office of Criminal Justice Services subgrantees to create/submit grant application, manage grant projects, and submit performance reports & requests for reimbursement.

If you have any questions or if you need assistance and you are trying to register for OCJS grants, please contact 614-466-7782 and ask to speak to your regional grant coordinator, found at www.ocjs.ohio.gov/solicitations.stm.

For JAG related questions, please contact Melissa Darby, JAG Grant Planner via email at MBDarby@dps.state.oh.us

For VAWA related questions, please contact Jacquetta Al-Mubaslat, VAWA Grant Planner via email at JAL-Mubaslat@dps.state.oh.us

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1. GMS System Requirements

The Ohio Office of Criminal Justice Services (OCJS) GMS is designed for use by the vast majority of computer users with little or no changes to the computer environment. The requirements that are mentioned below are common computer elements that should be present on most machines.

These GMS system requirements can also be viewed on GMS by selecting "System Requirements" from the Login page.

1.a. Operating System

OCJS GMS is designed for both of the two more common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing GMS from a Macintosh environment are required to have MacOS 7.5 or higher. Windows users are required to have an operating system that is Windows XP or higher.

1.b. Internet Connection

GMS is a web site designed for access via the Internet. For purpose of accessing GMS, minimum connection is by modem. For those using a modem, recommended connection speed is at least 33.6 kbps (kilobits per second). Internet connections "faster" than modem, i.e., cable, DSL, T1, wireless improve speed at which the system operates. In an office environment, there may already be an Internet connection, but if unsure, contact the network administrator.

1.c. Web Browser

This system was designed to be compatible with common up-to-date web browsers including Internet Explorer V.7 and above, Firefox, Safari, and Opera.

1.d. Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The GMS system automatically generates grant documents in PDF format using information that is saved into various narrative and budget pages. Using Adobe Acrobat Reader can view, print, or save PDF documents. Adobe Acrobat Reader can be downloaded at www.adobe.com.

1.e. Microsoft Word Viewer

GMS has a combination of both Microsoft Word and PDF documents. Microsoft Word increases GMS formatting options and reduces the amount of empty space on printed pages. If MS Word is not installed, MS Word Viewer is available for download at www.microsoft.com.

2. Grantee User Types

There are two types of subgrantee security roles:

- Project Director
- Viewer

These roles have different security levels needed to access Application/Grants, Performance Reports, Monitoring Reports, and Quarterly Reports. Once a Project Director is identified and a new user account is created, the Project Director can select and enter the organization's staff member names into GMS. Staff members, assigned by a Project Director, are given the role of staff. The two security roles are summarized below:

2.a. Project Director

- Creates new user account (OCJS will then validate this security role)
- Adds new users to GMS and assigns organization staff to staff or Project Director security roles
- Edits and/or deletes user account information
- Views, applies for, and submits grant application
- Enters, updates, and deletes information on Applications/Grants
- Downloads and attaches files to Application/Grants
- Cancels Application/Grants
- Modifies Application/Grants with status of "Modifications Required"
- Checks status of Application/Grants

2.b. Viewer

- Read-Only

3. System Access

There are two ways to access GMS:

1. Request access to GMS via the GMS Login page and get approved by a OCJS GMS system administrator

   -OR-

2. When an organization already has an GMS account, obtain access from the organization's Project Director. This is the preferred way to access GMS – it is quick and provides greater security for the organization's records.

3.a. Project Director Access

To gain access to GMS as a Project Director, first create a new user account.

From the GMS Home page select "New User?" located in the Login section.

Note: if you are already registered as a DRC grantee, please use that login information to access the system. You do not need two accounts.

1. Fill in the Contact Information as required. All items marked with an * are required
   a. The "Username" field can consist of letters and numbers
   b. The "Password" field can consist of letters and numbers and must be between 7-20 characters
   c. The fields "Password" and "Confirm Password" must match
      i. Special characters are allowed in the password
2. Save

After saving the new user information, the account will be validated by an OCJS GMS system administrator. If attempting to access the system before validation, the following message will appear:

When access has been granted, an e-mail confirming the account has been validated will be received. If the account is set up as a Project Director, the user will now be able to create additional user accounts for the organization.

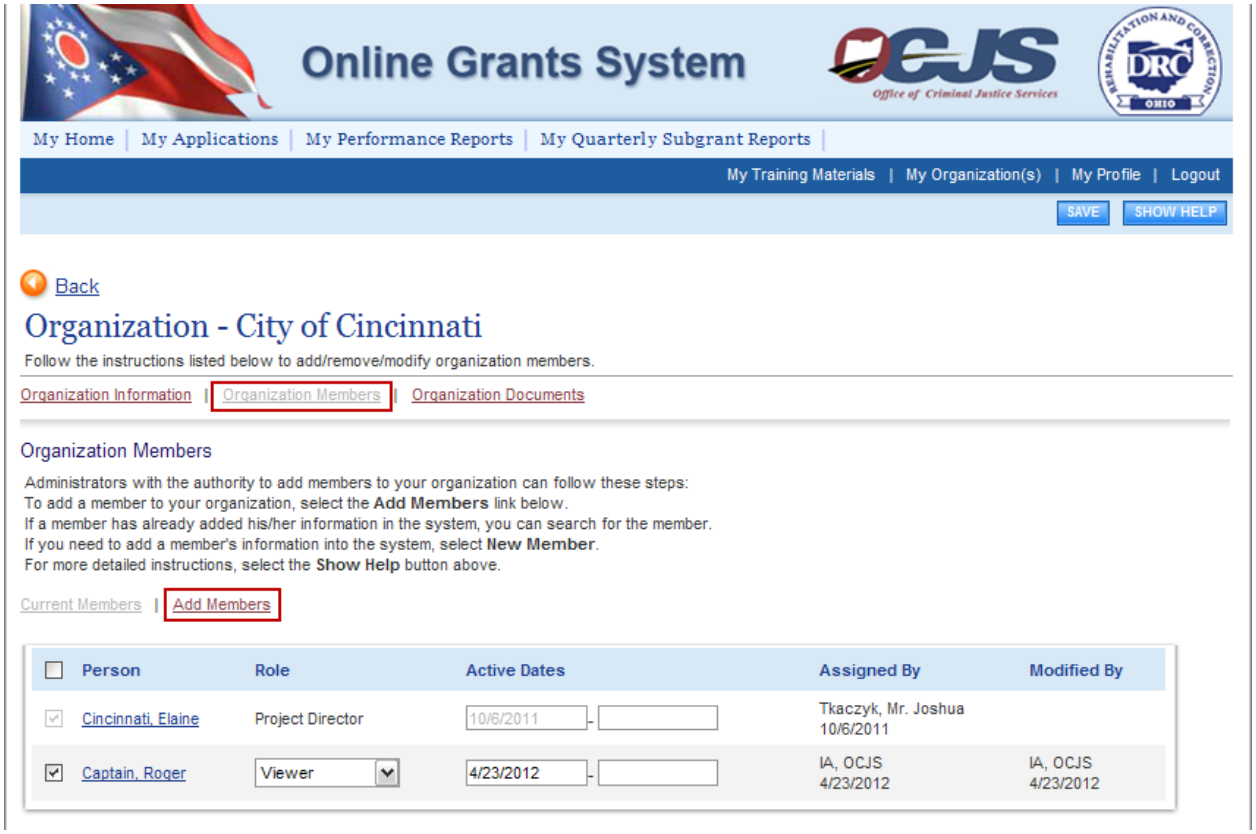
Note: Users are not able to access documents created *prior* to the date they are activated/assigned to an organization. For access to documents dated before a user's activation date, a Project Director must assign the user to each individual form/document using the "Add/Edit People" option located within each document. On the document's main menu, under "Access Management Tools," "View Management Tools," select "Add/Edit People."

3.b. Viewer Access

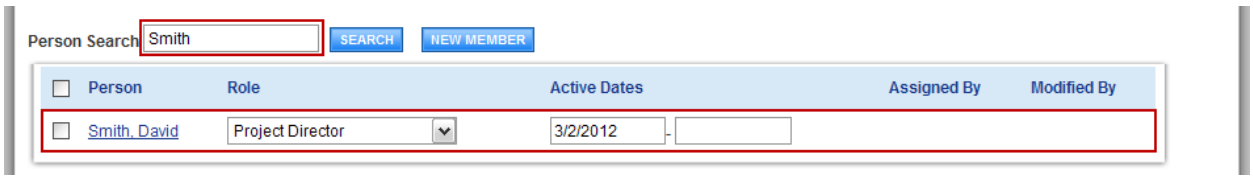
The preferred method for gaining access to GMS is to have the organization's Project Director add new users to the system.

To add a staff person to an organization:

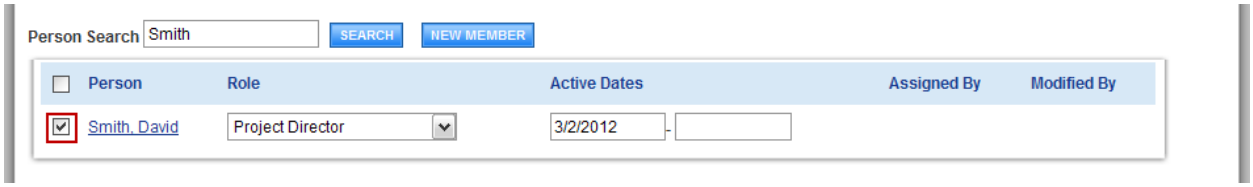
1. Select "Organization(s)"
2. Select "Organization Members"
3. Select "Add Members."



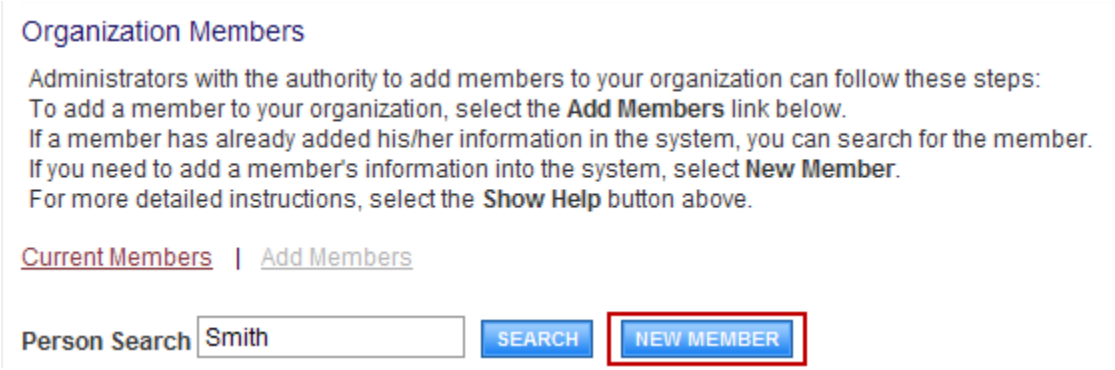
4. A person search field appears. Type the first or last name of the person to add and select "Search." The results appear below.



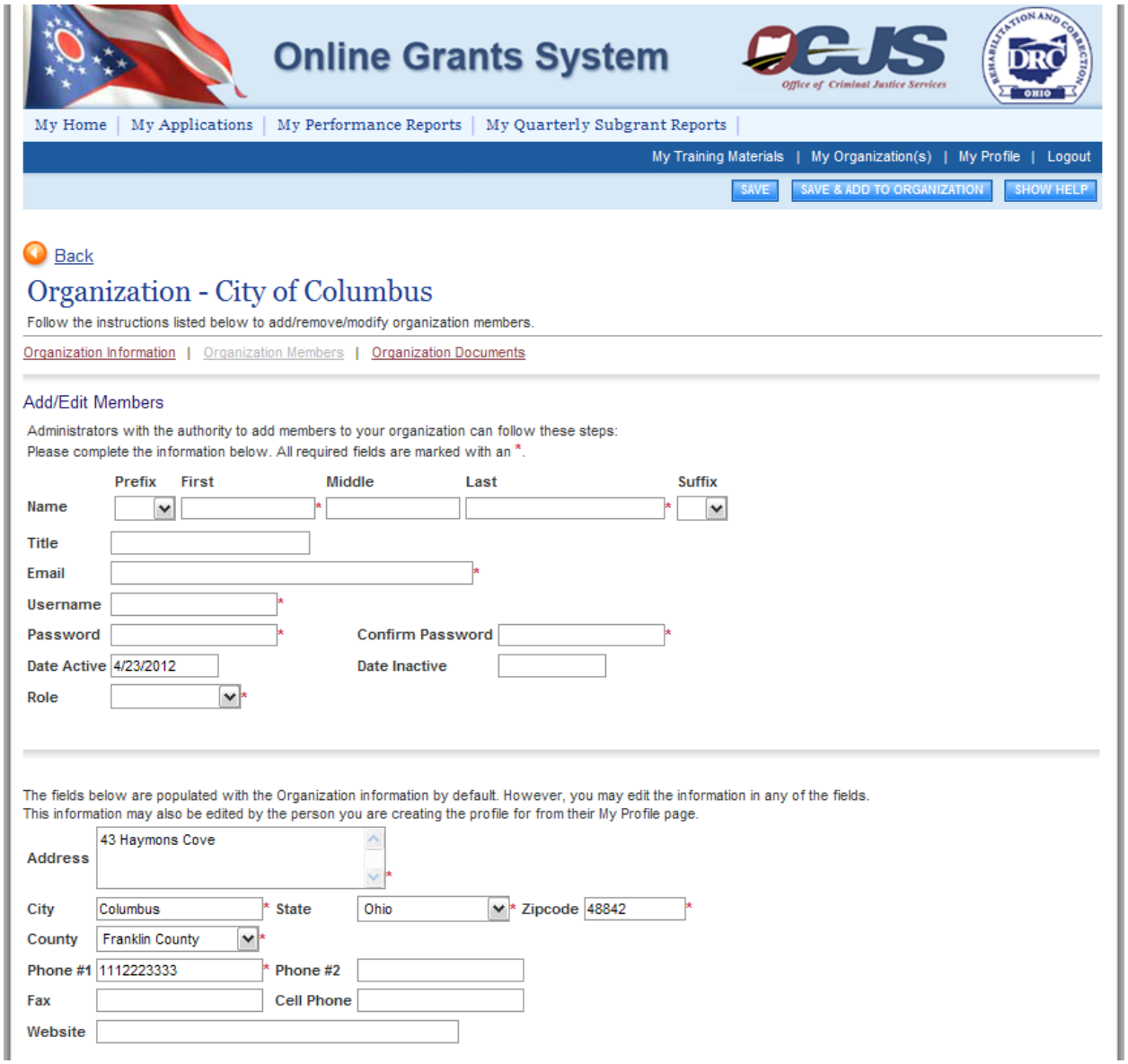
5. Place a check in the box next to the person to add. Select a role, enter an active date (beginning), and "Save." Then select "Current Members" and the person added should show with the rest of the organization's member names.



6. If the person's name does not come up in the search results, then select "New Member."



7. Enter information for the new user and "Save & Add to Organization."



4. Login Page

4.a. Accessing GMS

To access GMS, enter http://www.ocjsgrants.com into the address bar of a web browser. The page looks like the image below.

Note: GMS does not save the username and password. This option *may* be available on the browser.

4.b. Accessing GMS from the OCJS Website

GMS can also be accessed from the OCJS website at

ocjs.ohio.gov/grants.stm

4.c. Bookmark/Favorites

GMS may be bookmarked, or added, to the favorites menu

After accessing the GMS Login page, on the Internet Explorer (IE) menu bar:

1. Select "Favorites"
2. Select "Add to Favorites"
3. Rename the site, if desired
4. Select "Add"

4.d. Adding GMS to List of Trusted Sites

To avoid various browser-related restrictions unnecessarily placed on GMS, make the following changes to the web browser.

If using Internet Explorer, we recommend adding the OCJS GMS Home page to the list of trusted sites as follows:

1. Select "Tools"
2. Select "Internet Options"
3. Select "Security"
4. Select "Trusted sites"
5. Select "Sites"
6. In "Add this website to the zone:" enter: http://www.ocjsgrants.com
7. Select "Add"
8. Select "Close" and then "OK"

5. User Contact Information

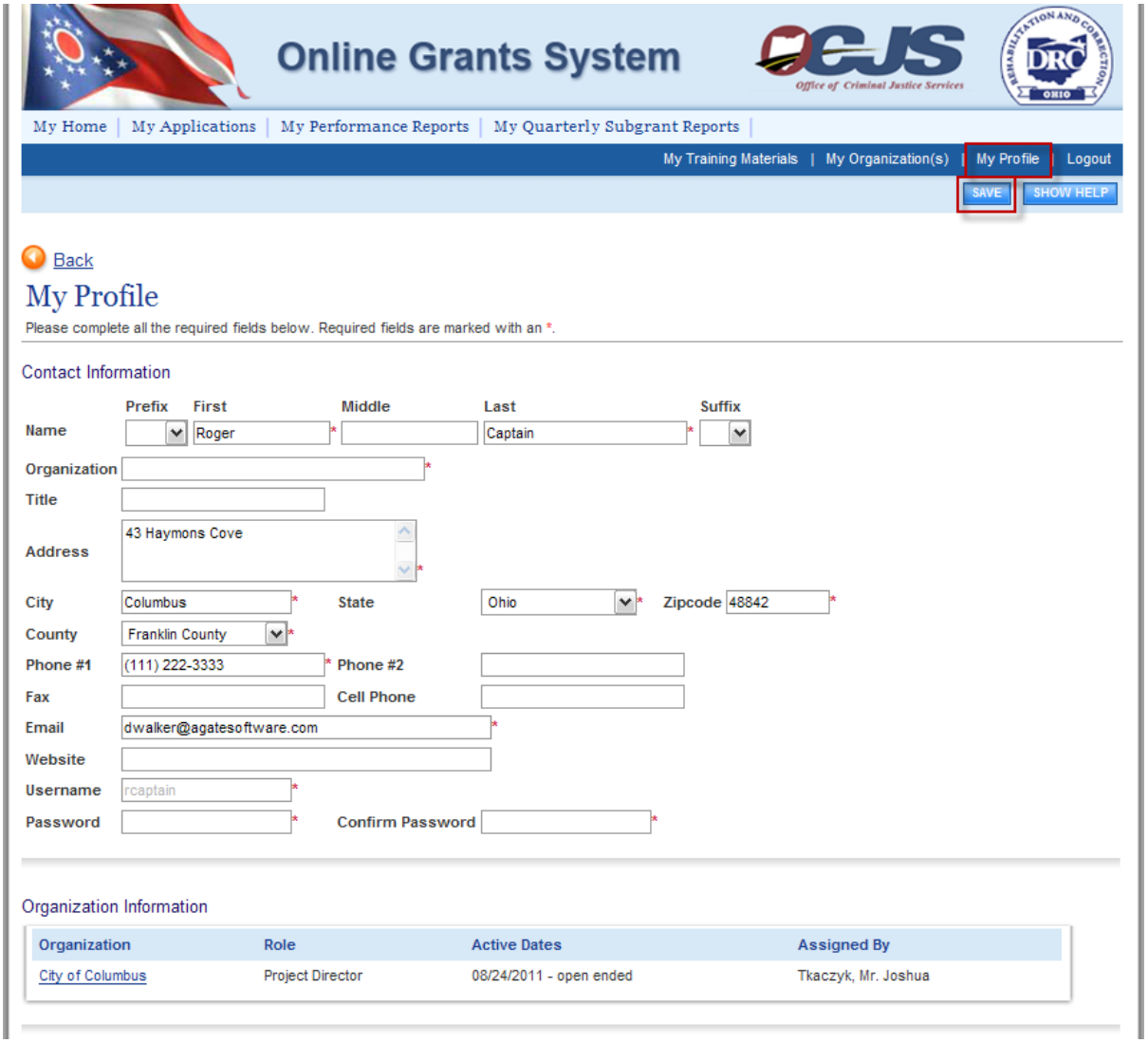
5.a. Updating User Profile

It is important to keep contact information up-to-date. This may be done quickly and easily in GMS.

By keeping records current, OCJS staff members are able to easily contact users when a need arises. This is especially important for timely messaging. When system messages are sent from GMS, they are sent to the e-mail address in the user profile. **When an incorrect e-mail address is in the contact information, automatic notifications will not be received.** Also, in the event of a forgotten password, the e-mail address is required and must match the one listed in the contact information.

Update the profile at any time by:

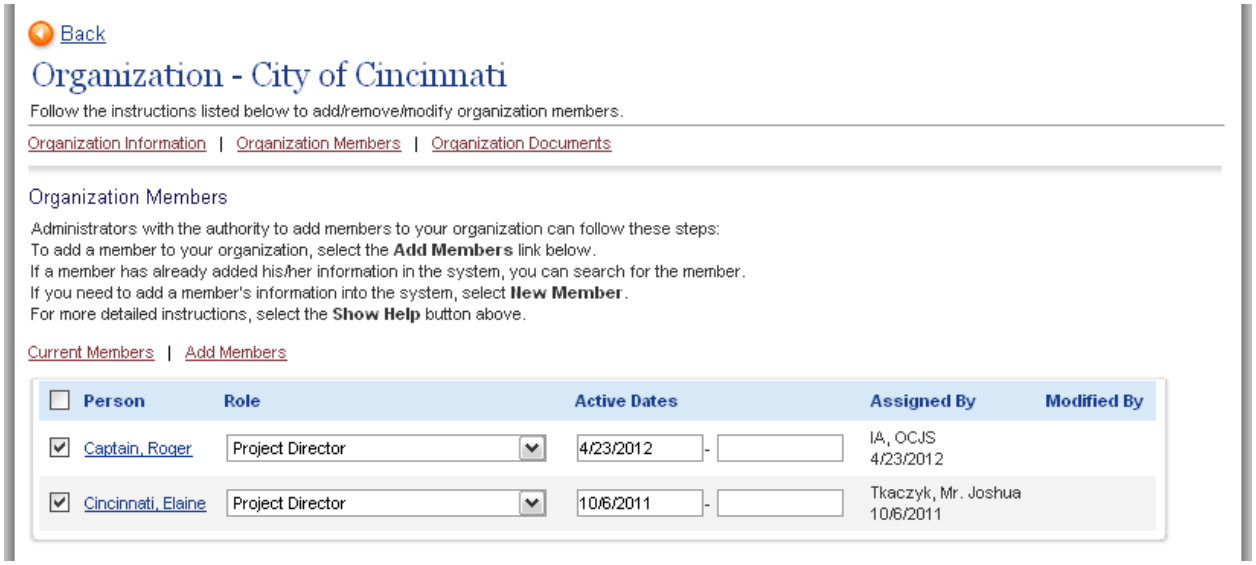
1. From the Home page, select "Profile"
2. Update the form with current information
3. Select "Save"



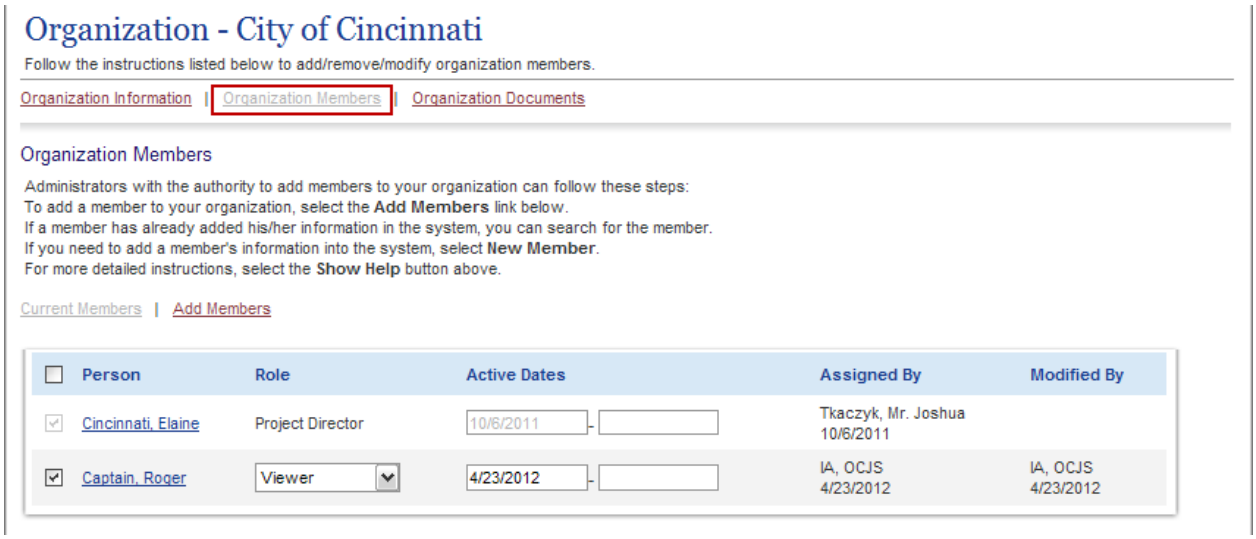
5.b. Updating Another User's Contact Information

An organization's Project Director may edit another user's contact information as follows:

1. Select "Organization(s)" and then select the organization whose member(s) to edit

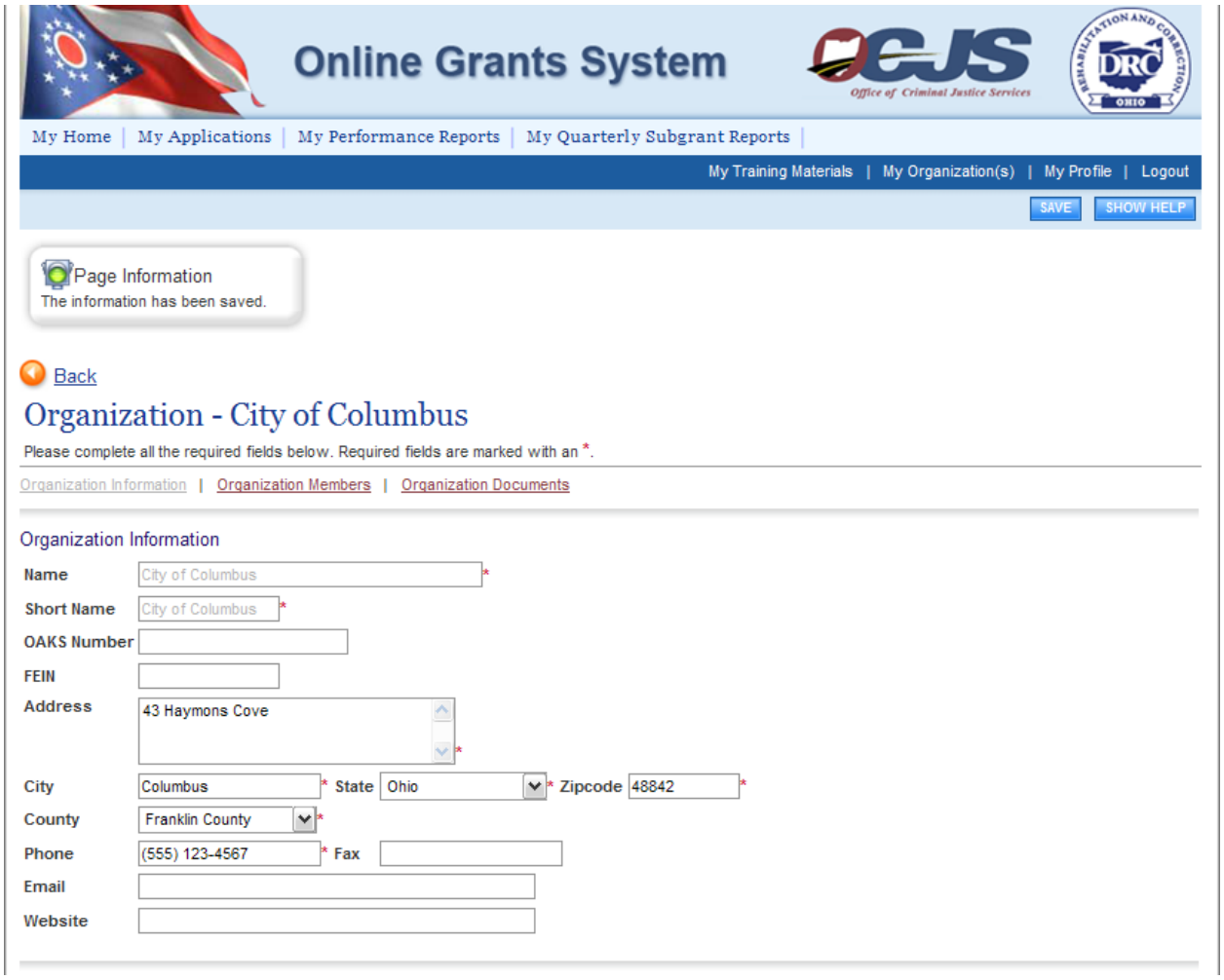


2. Select "Organization Members"
3. Select the name of the person whose contact information to change
4. Update accordingly and "Save"



5.c. Updating Organization Information

When an organization's contact information changes, it is important to update the system.



There may be links within "Organization Information" that require additional information. If these links exist, select the links and fill out the required information. An example of such a link might be, "Mailing Address."

5.d. Deactivating a User

A Project Director can deactivate a member of his/her organization. A deactivated user cannot access or edit proposal-related information. To deactivate a user:

1. If there is more than one organization, then first select the one to edit
2. Select "Organization Members"
3. Using the drop-down calendar, set the second "Active Dates" field to the date on which the user to have access will no longer have access
4. Select "Save"

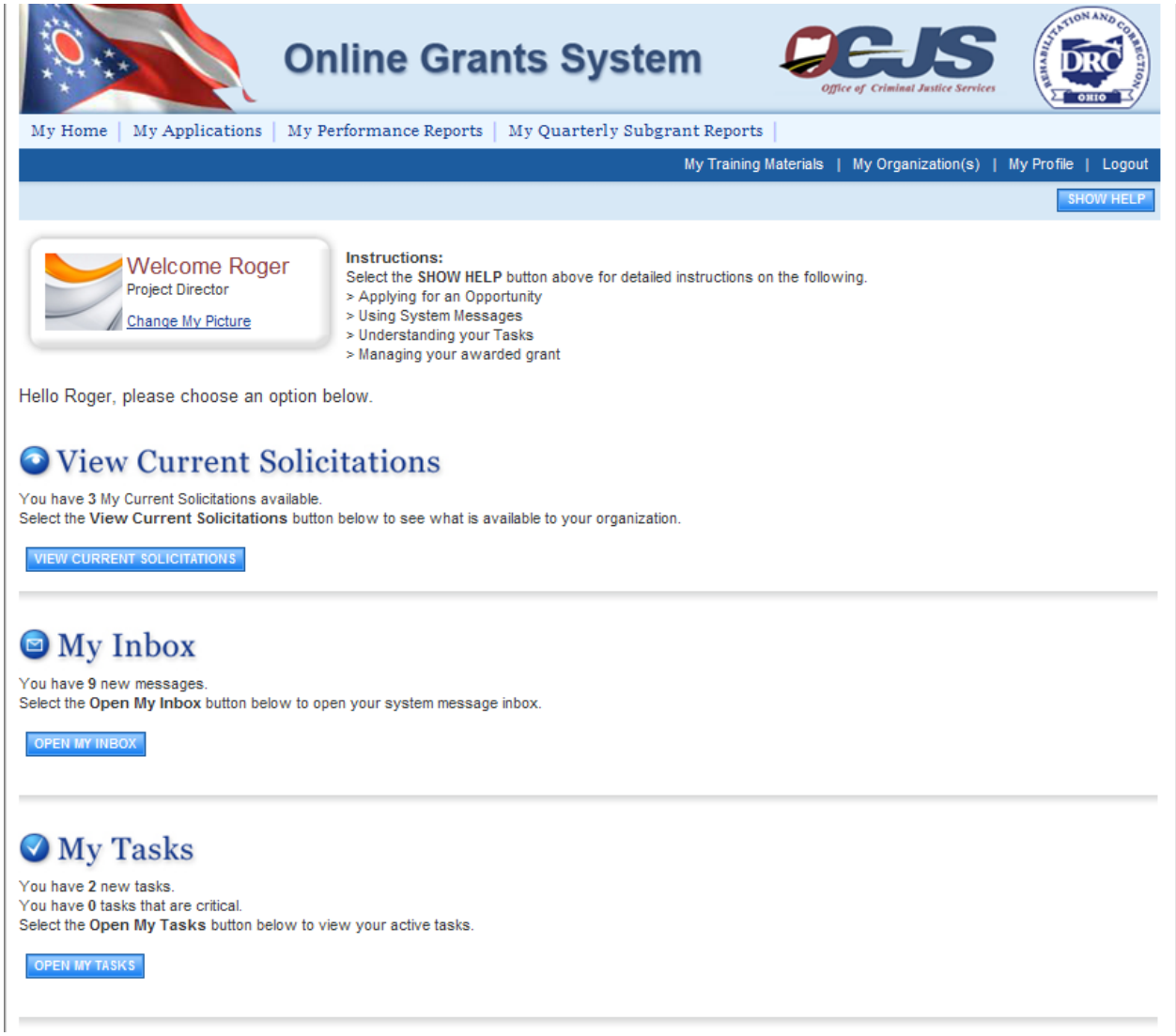
6. Home Page

The Home page is the next page seen after logging into GMS grants. From the Home page all types of documents can be accessed, such as application /grants, contract information, forms, reports, e-mail/messages, user information, system information, etc.

GMS features a number of tabs across the top of the screen that allow access to the My Home page, My Applications.

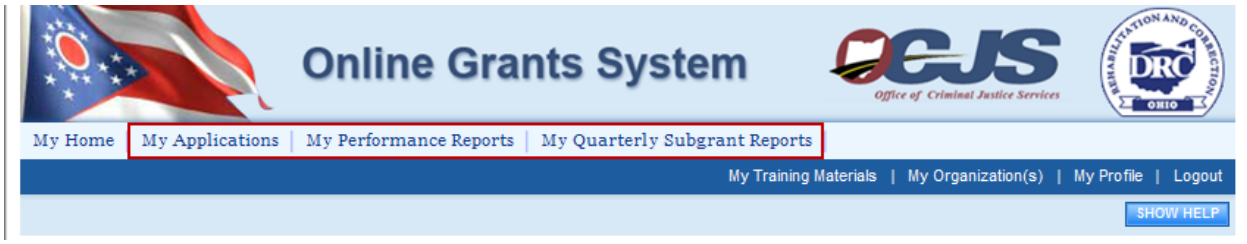
If an account has not been assigned a global role, only the "Home" tab displays.

Likewise, when there are no active tasks to perform, "My Tasks" does not appear on the Home page. There may be times when only "My Inbox" (e-mail/messages) appears on the Home page.



6.a. Searching for Documents

The My Applications, My Performance Reports, and My Quarterly Subgrant Reports tabs allow for searching documents in the system. Search fields and functionality are the same for all of the tabs. This example will search for a proposal/grant, but the steps are the same for all document types.



To view a list of application /grants:

1. Select "My Applications"
2. "Search," and the list displays below

To view application/grants by type, name, person, status, organization, or by year:

1. Select "My Applications"
2. Fill in the necessary information
3. "Search"

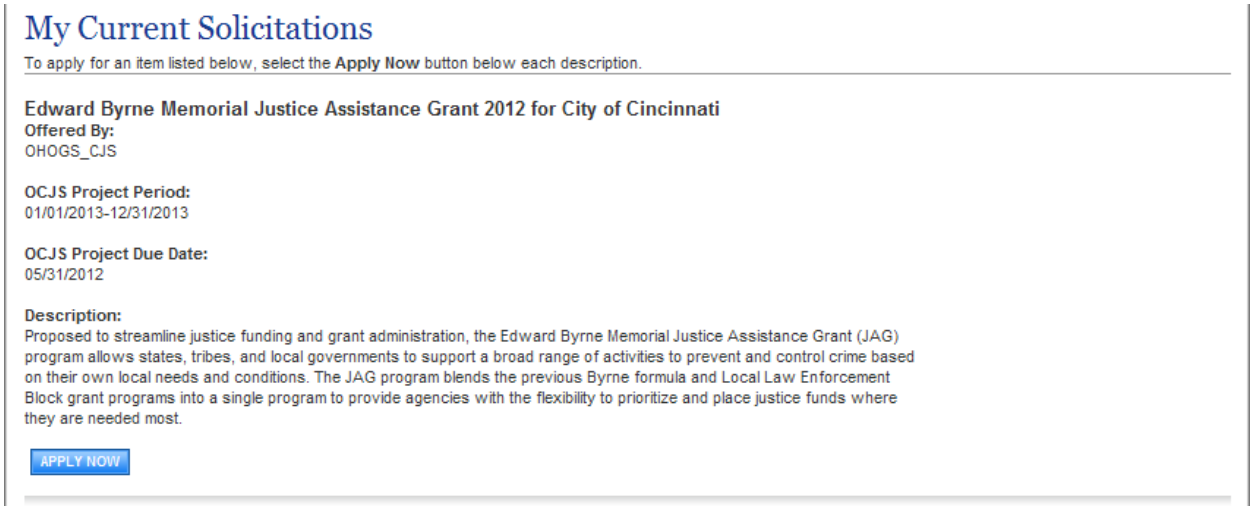
From the list of application /grants, select the one to view by selecting the name.

Application Search

Note: Until users submit Applications a search will result in no records found.

6.b. Viewing Current Solicitations

The "My Current Solicitations" option is only visible to subgrantees and lists available application that subgrantees can apply for and submit to OCJS. To initiate a solicitation, select "View Current Solicitations" and then "Apply Now."



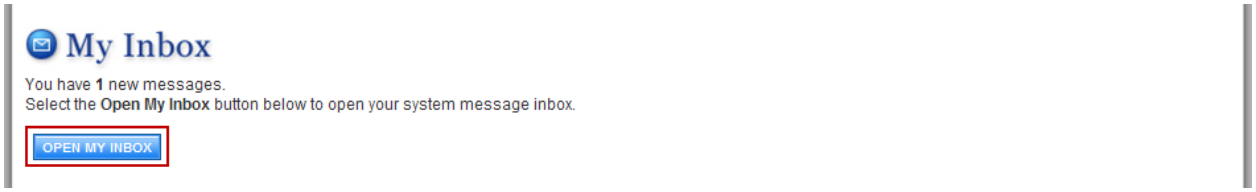
6.c. Accessing My Inbox (E-mail/Messages)

GMS system e-mail/messages are sent periodically. E-mail appears both in GMS at My Inbox and at the e-mail address listed in the GMS contacts information.

For example, an e-mail may be sent upon submission of a proposal, a proposal being returned for modification, an approaching deadline, a program change, etc. These messages keep users informed and serve as a reminder when certain tasks required action.

To receive timely messages it is important to maintain an active e-mail address in GMS (See user guide section 5. Contact Information). An incorrect e-mail address (or an e-mail box that is full) will prevent users from receiving important OCJS grants-related messages.

My Inbox allows access to system e-mail/messages. To see contents, select "Open Inbox."



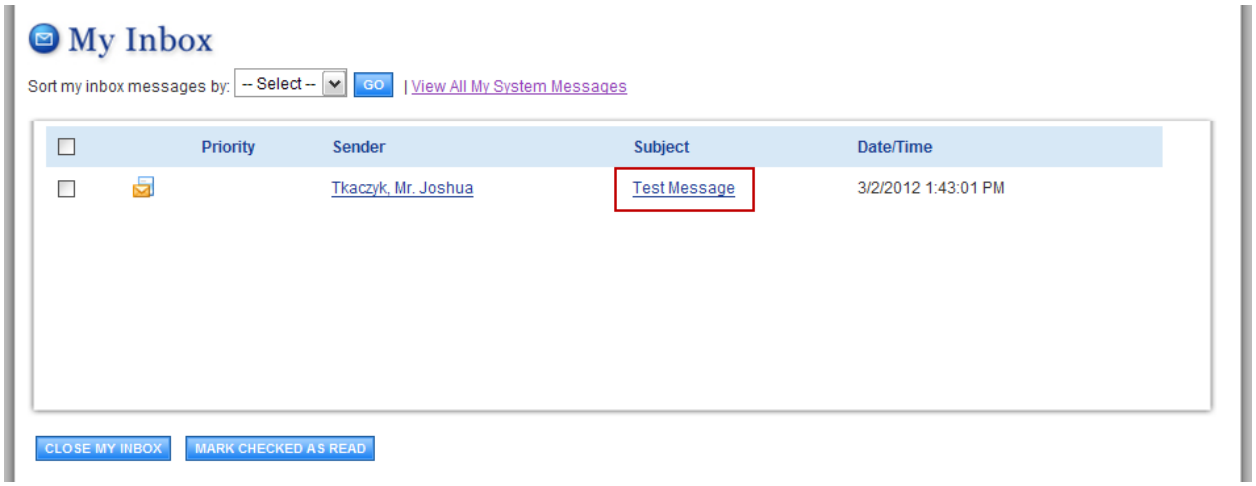
6.c.1 Viewing E-mail/Messages

All new messages (unread), if any, are displayed.

The following can be done in the Inbox:

- Sort messages by Priority, Sender, Subject, or Date/Time
- Select "View All System Messages" to see all messages going back to when system access was received
- View a message's priority status

- Select its subject link to view the message
- See date/time a message was sent
- Select a sender's name to reply to a message
- Check box at left of message to "Mark Checked As Read"



6.c.2 Searching for E-mail/Messages

To search for a message, select "View All System Messages." From the "System Messages" page, enter a keyword and "Search." A list of messages that match the search criteria will display.

The following can also be done from this menu:

- Sort search results by Priority, Sender, Subject, Date/Time, or Status
- View all messages going back to when system access was received
- View a message's priority status
- Select a sender's name to reply to a message
- See date/time a message was sent

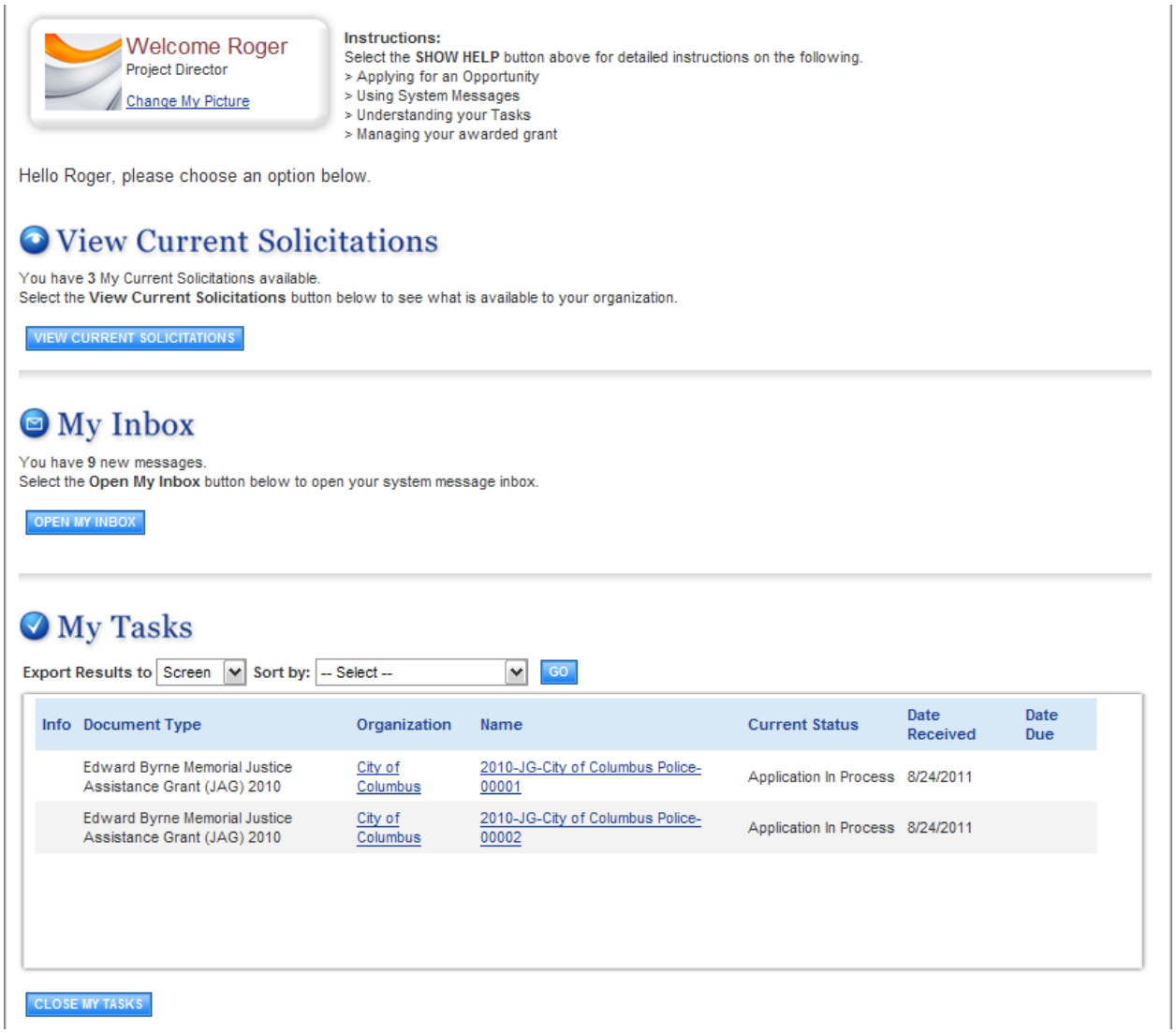
6.d. Completing My Tasks (Active Tasks)

"My Tasks" appears on the Home page when there are tasks that require action. Some of the tasks may be critical (indicated by a red Date Due).

To access documents requiring action, select "Open Tasks" and then the name of a document to go to that document's menu.

When there are no active tasks, "My Tasks" is not visible on the Home page.

Note: To access all application/grants that are assigned, see user guide section 4.a. Searching for Documents.


Welcome Roger
Project Director
Change My Picture
Instructions:
Select the SHOW HELP button above for detailed instructions on the following.
> Applying for an Opportunity
> Using System Messages
> Understanding your Tasks
> Managing your awarded grant
Hello Roger, please choose an option below.
View Current Solicitations
You have 3 My Current Solicitations available.
Select the View Current Solicitations button below to see what is available to your organization.
VIEW CURRENT SOLICITATIONS
My Inbox
You have 9 new messages.
Select the Open My Inbox button below to open your system message inbox.
OPEN MY INBOX
My Tasks
Export Results to Screen
Sort by: -- Select --
GO
Info
Document Type
Organization
Name
Current Status
Date Received
Date Due
Edward Byrne Memorial Justice Assistance Grant (JAG) 2010
City of Columbus
2010-JG-City of Columbus Police-00001
Application In Process
8/24/2011
Edward Byrne Memorial Justice Assistance Grant (JAG) 2010
City of Columbus
2010-JG-City of Columbus Police-00002
Application In Process
8/24/2011
CLOSE MY TASKS

7. Application Initiation

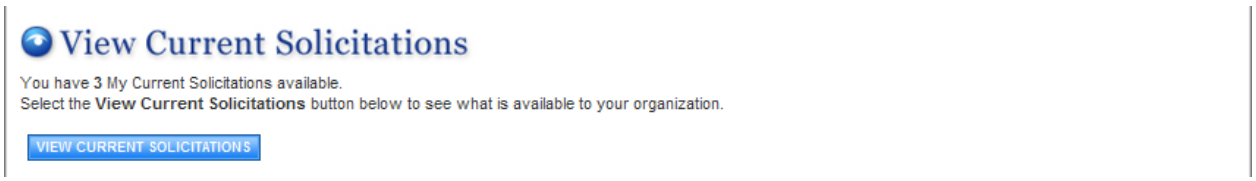
During a grant cycle's Request For Proposal (RFP) period, "My Current Solicitations" appears on the Home page. When the application period is over, this option is not visible.

A subgrantee Project Director is the only role authorized to initiate an application.

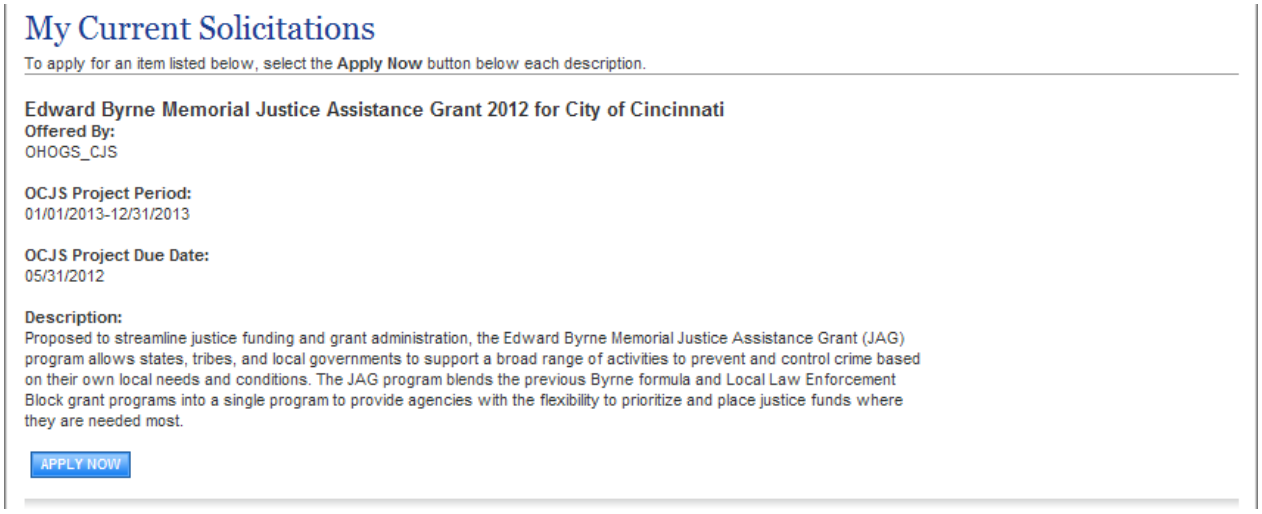
7.a. Initiating an Application

To initiate an application:

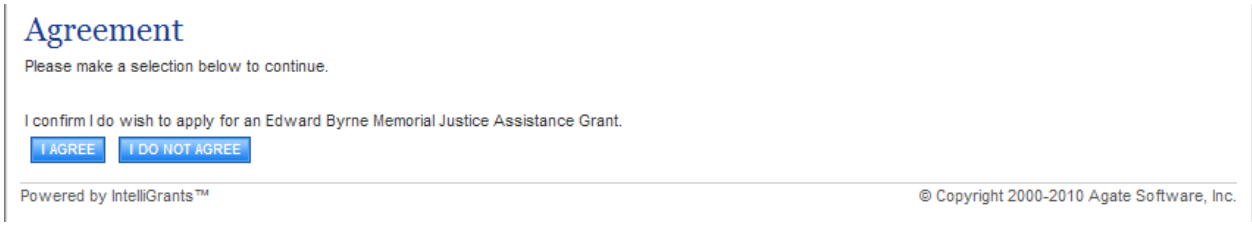
1. On the Home page, under My Current Solicitations.
2. A list of available grant applications display.



3. To initiate an application, select "Apply Now."



4. A page appears asking for confirmation, select "I Agree." An application is created for the organization, and the application/Grant menu is displayed.


Agreement
Please make a selection below to continue.
I confirm I do wish to apply for an Edward Byrne Memorial Justice Assistance Grant.
I AGREE
I DO NOT AGREE
Powered by IntelliGrants™
© Copyright 2000-2010 Agate Software, Inc.

7.b. Returning to an In-Progress Application/Grant

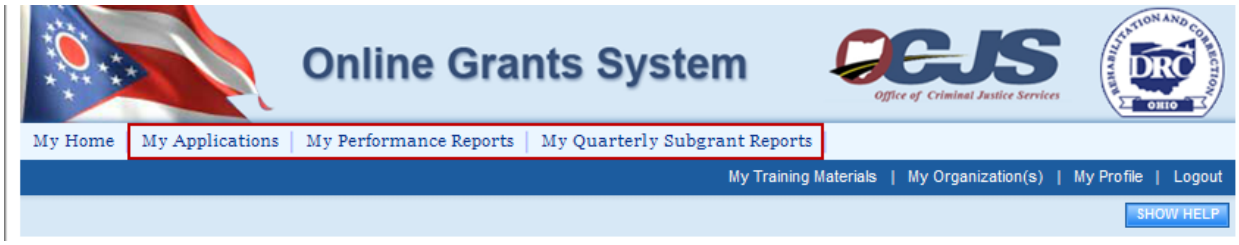
Following initiation of a proposal, a new task appears under the My Tasks section on the Home page.

When logging out of GMS and returning later to continue working on a proposal:

1. Go to top left of the screen, select Home
2. Under My Tasks, select "Open Tasks" to return to a proposal initiated by the organization.

7.c. Searching for an Application/Grant

To search for a proposal, or any other grant document, select "Proposal/Grant." See user guide section, 6.a. Searching for Documents.



8. Application/Grant Menu

The Application/Grant menu is ordered into four sections to help keep tasks and information organized. The sections are described below.

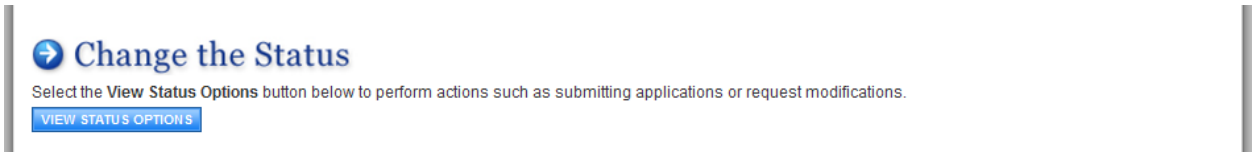
8.a. Viewing, Editing, and Completing Forms

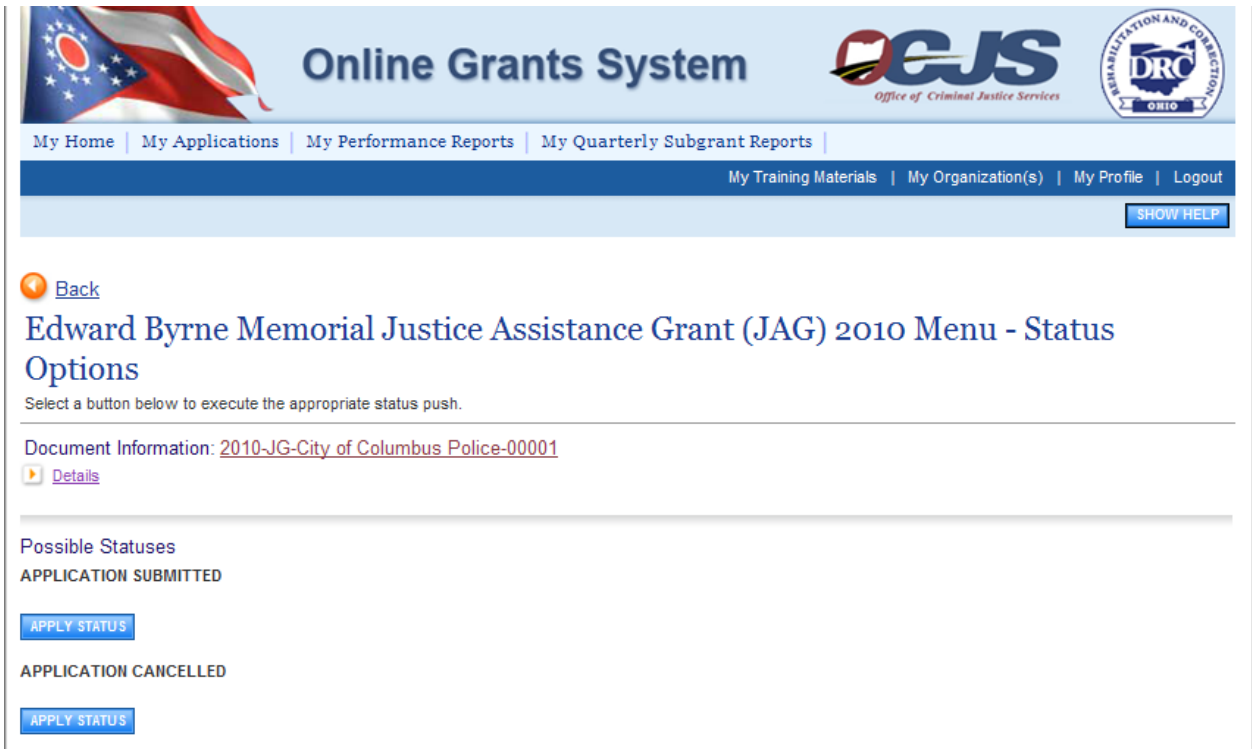
"View, Edit and Complete Forms" is where the vast majority of work is completed within the system. This section contains the forms necessary to complete before submitting a proposal. To access a form, select "View Forms" and then select the name of the form to view, edit, and complete the form.

When the icon on the far left of the menu is a stop sign , that indicates the page has an error on it. When the icon is a pencil , that indicates the page has been saved at least once, and is being edited or is complete.

8.b. Changing the Status

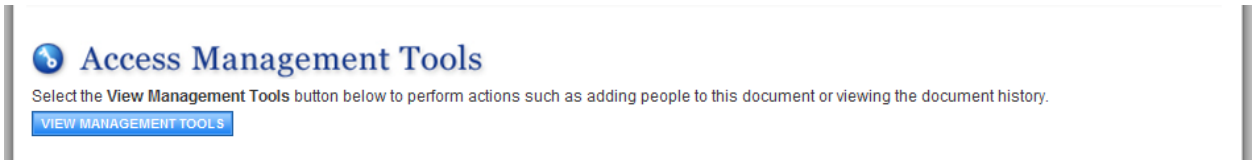
"Change the Status" allows a Project Director to submit a proposal, push grant documents to the next status, or request modifications. Select "View Status Options" to see which possible statuses are available.

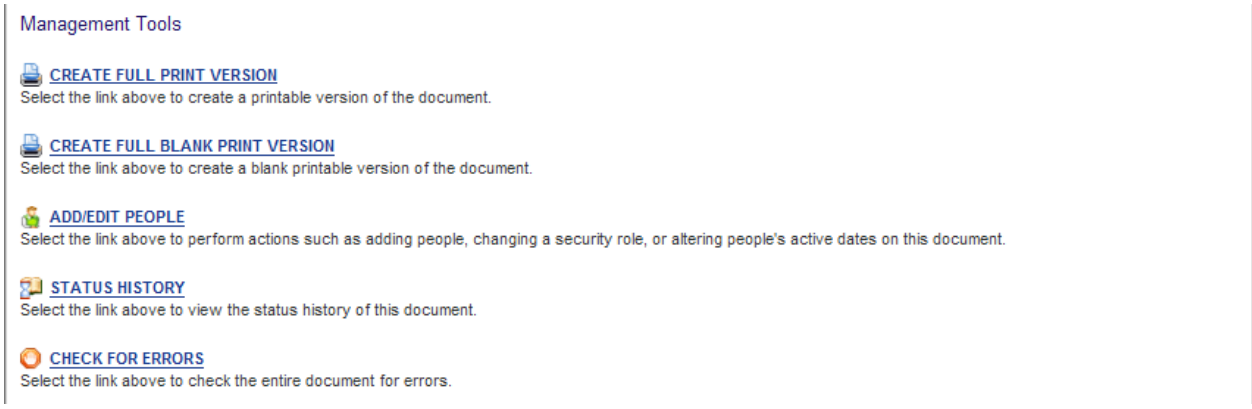




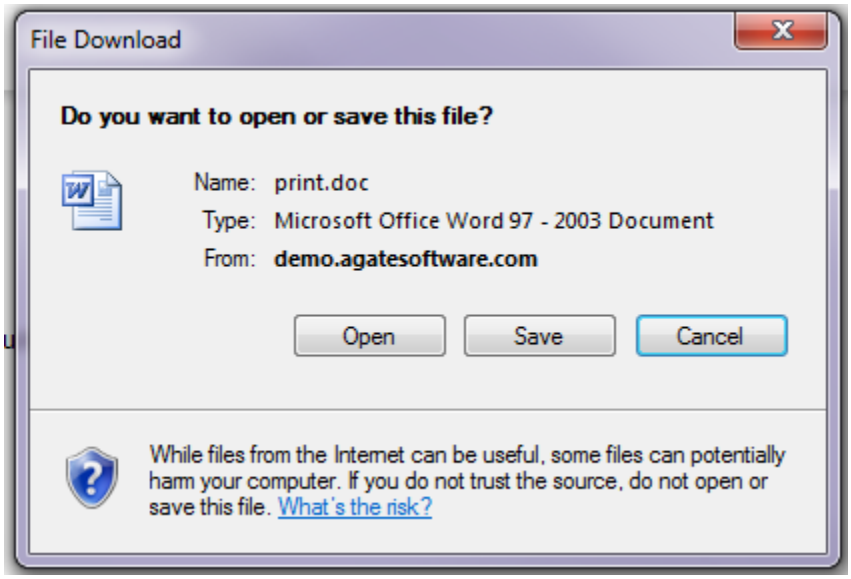
8.c. Accessing Management Tools

"Access Management Tools" allows a Project Director certain administrative responsibilities such as the ability to add/edit people to a proposal (attach users to a proposal) and view a proposal's status history.

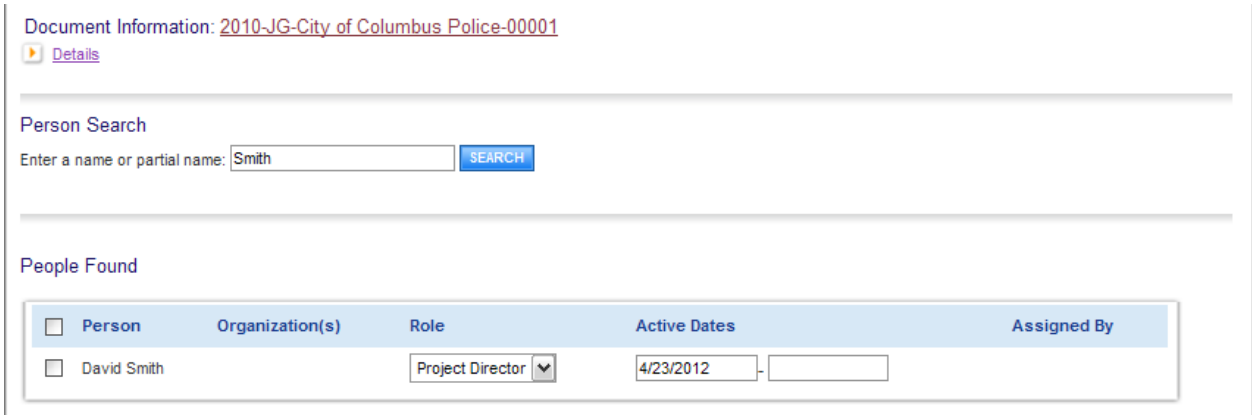




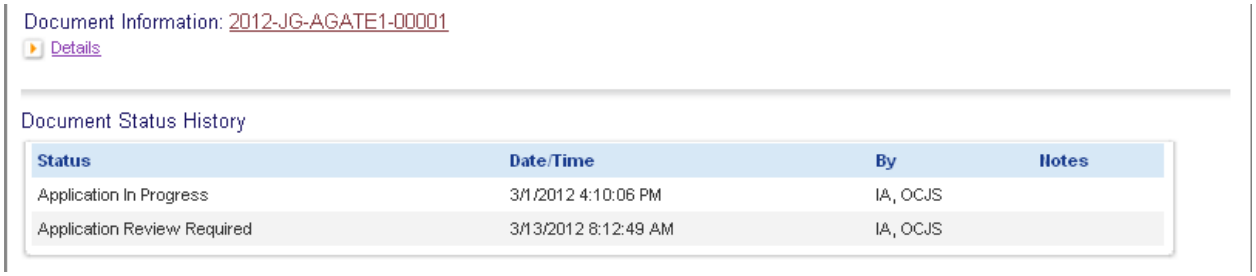
Create Full Print Version creates a printable version of the document for reading and/or saving. **Create Full Blank Print Version** creates a form/template version.



Add / Edit People is used to add people, change security, alter active dates, etc. See user guide section 9. Proposal/Grant User Management.



Document **Status History** provides the statuses that a document has passed through.



Check for Errors checks document for errors and returns a list of links to pages with identified errors that need to be corrected before the document can be moved to the next status.

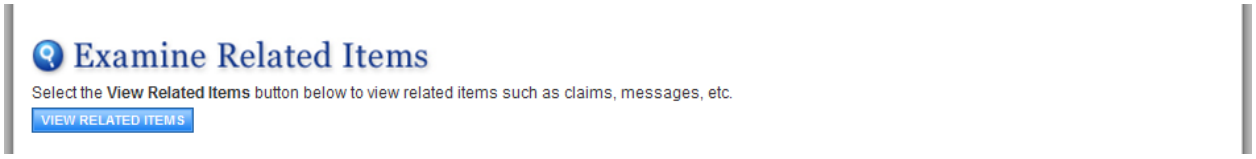
Note about Global Errors always showing for Title Page and Budget Request by Resource:

Upon submission, you will receive a Global Error about the Budget Request by Resource and Title Page. There is data on both of these pages which is pre-populated from the Budget, so the system enforces you to revisit/resave these two pages to populate that data, since you will most likely complete the budget after completing these pages.

Once this is complete, you will need to re-submit the document since it was not successfully submitted the first time, due to the above errors.

8.d. Examining Related Items

"Examine Related Items" is where documents such as Reports, Requests for Reimbursement, Supplementals, and related messages are found.



Performance Report Menu - Related Items

The various sections below can link to items that are associated with this document.

Document Information: ARRA-2011-OH Applicant Test Org 1-00001

Details

Related Documents

Sort search results by: -- Select -- GO

Document Type	Name	Current Status	Period Date / Date Due	Created By	Last Modified By
Edward Byrne Memorial Justice Assistance Grant (JAG) 2011	JAG-2011-JG-A01-6284A	Application Funded	09/03/2010 - 12/31/2010 N/A	John Lennon 9/15/2010 6:55:52 PM	Mr. Joshua Tkaczyk 9/15/2011 8:45:12 AM

Related Messages

Sort search results by: -- Select -- GO

Priority	Sender	Subject	Date/Time	Status

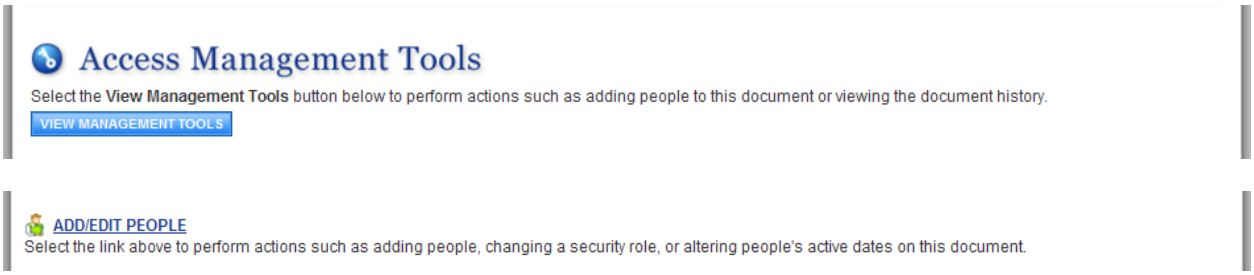
9. Application/Grant User Management

The Project Director is responsible for adding and ensuring that appropriate users are assigned documents. Staff may assist the subgrantee Project Director with completing required forms. User access can be assigned or removed throughout a grant's lifecycle. Only a Project Director can submit a proposal.

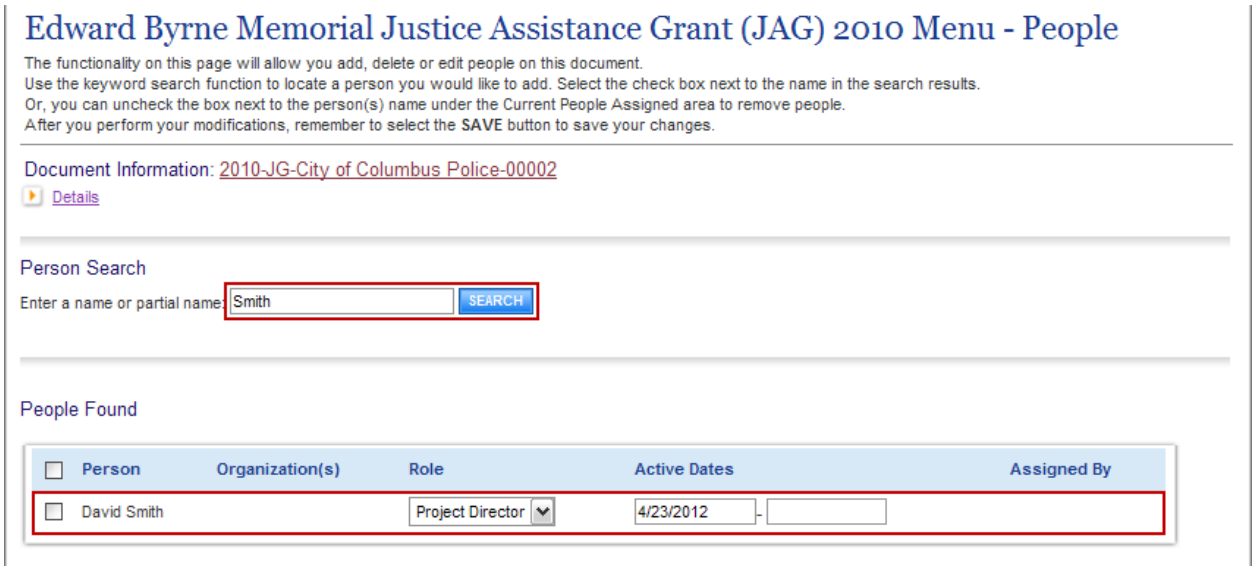
9.a. Assigning User Access to Application/Grant

To view GMS documents, or to assist with completing forms, a user must be linked to the documents. To add a user to a document:

1. From the Application/Grant's main menu, under Access Management Tools, select the "View Management Tools" button and then "Add/Edit People."



   a. Type the name, or part of the user's name (at least 3 characters), in the Person Search field, and "Search."
   b. Check the box in the column next to the desired person
   c. Select a role for the user, along with an appropriate Active Date
   d. "Save" to complete adding the user to the document



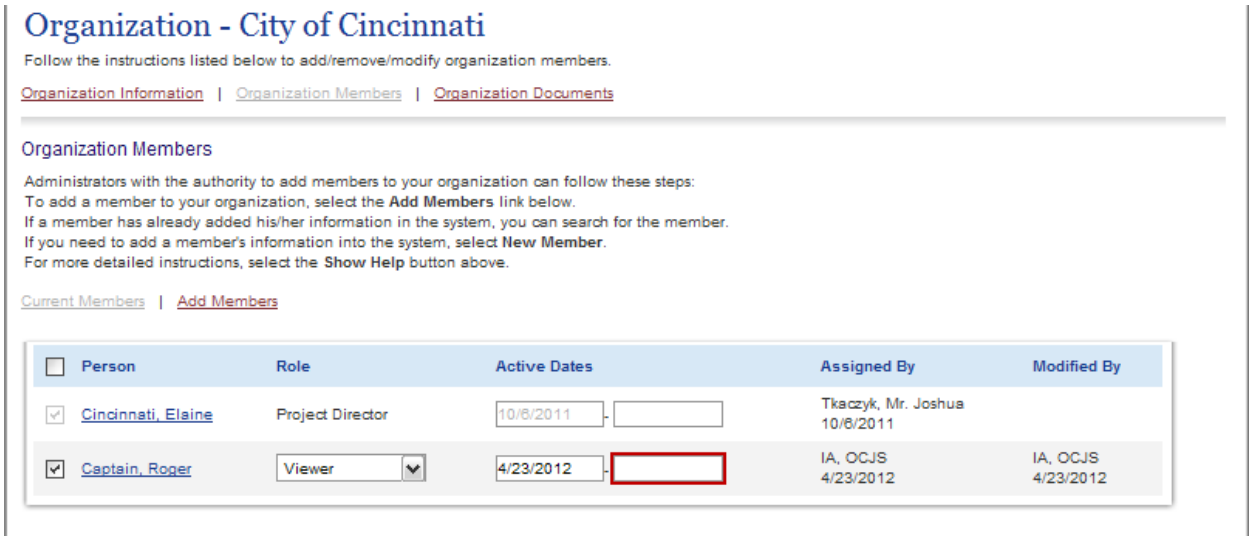
2. Repeat this process to add additional users, if necessary

3. Return to "Add/Edit People" to confirm that all users have been added correctly.

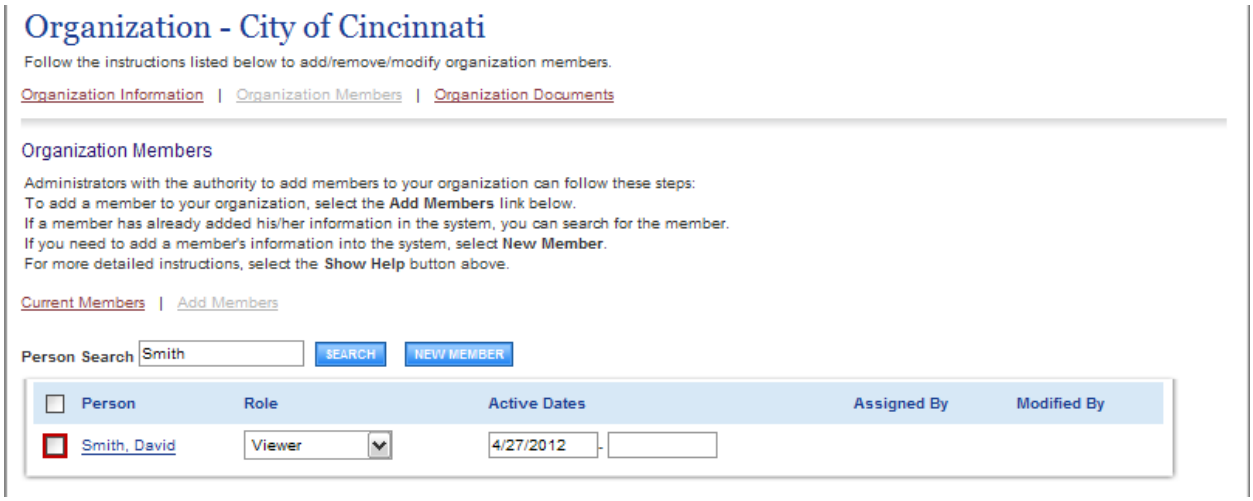
9.b. Removing User Access to Application/Grant

There are two ways to remove a user from a GMS document.

1. From a Application/Grant's main menu, under Access Management Tools, "View Management Tools" and then "Add/Edit People." Edit "Active Dates" for the user. The user will not be able to access the document before a specified start-date (first field) or after a specified end-date (second field).



2. Remove a user by unchecking the box next to the person's name and "Save."



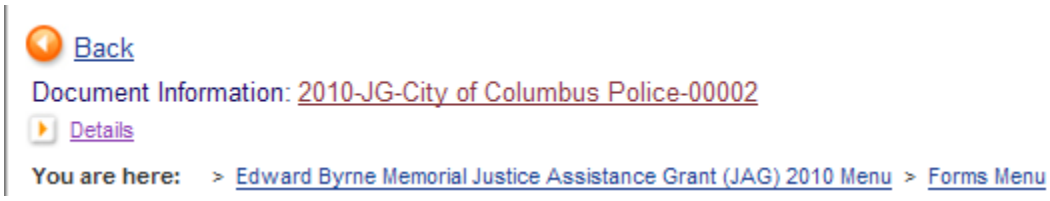
10. Forms Completion

On a Application/Grant's Form Menu the forms within an application are shown. These are the forms that must be completed before submitting the proposal. The following sections go through the information necessary to complete an application.

10.a. Navigating Forms

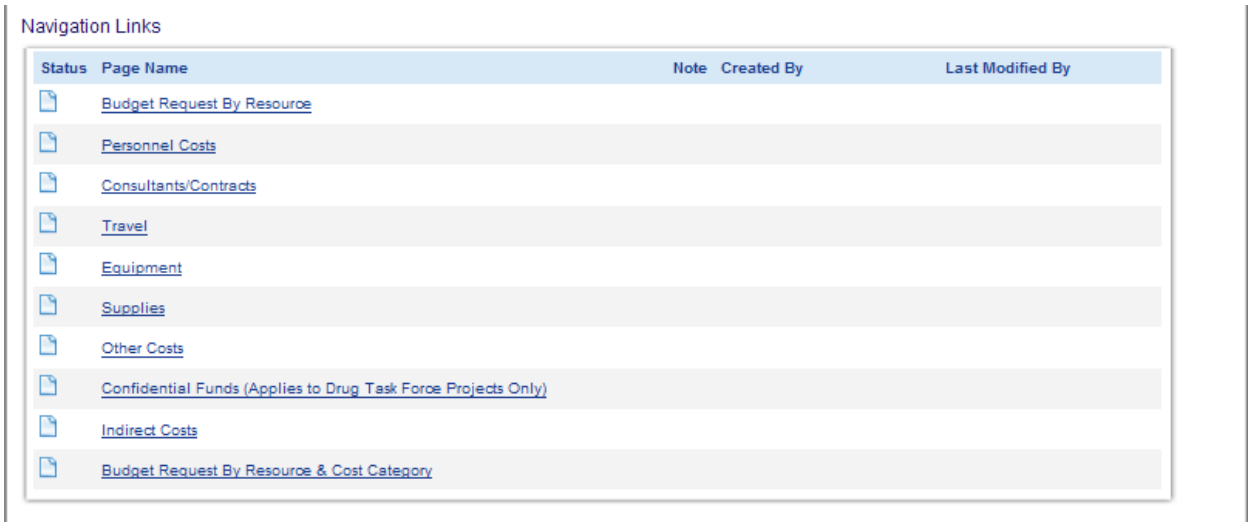
After opening a form, there are two ways to navigate.

1. Use the links following "You are here:"



2. Use the Navigation Links listed at the bottom of the page

Navigation Links provides access to next related pages. Select the appropriate page name to go to that form.



Note: To ensure that changes made to a form are not lost, select "Save" before leaving the form.

To return to the forms menu, where another form can be selected to complete, select "Forms Menu."

10.b. Automatic Calculations

When possible, GMS automatically calculates totals and other numbers. The Budget Summary page is a good example of this. When the page is saved, the system takes the values that were entered and displays them on the Budget Summary page. The system then calculates the numbers for the results. Remember to select "Save" in order to see the results of the form calculations.

SALARIES

Name of Employee	Title	Employment Status	Start Date For This Fiscal Year	End Date For This Fiscal Year	Number of Hours Worked	Hourly Wage	Total
test	test	Part Time	03/01/2012	03/31/2012	20	$20.00	$400.00
test 2	test 2	Full Time	03/01/2012	03/31/2012	40	$20.00	$800.00
							$0
							$0
							$0
							$0
							$0
							$0
							$0
							$0
				FY2013 Salary Total			$1,200.00

Justifications:

0 of 500

10.c. Error Messages

When a form is saved and required fields are not filled-in, or on-screen application rules have been violated, an error message displays across the top of the page. Errors do not need to be corrected immediately, however to successfully submit the proposal, all errors must be fixed.

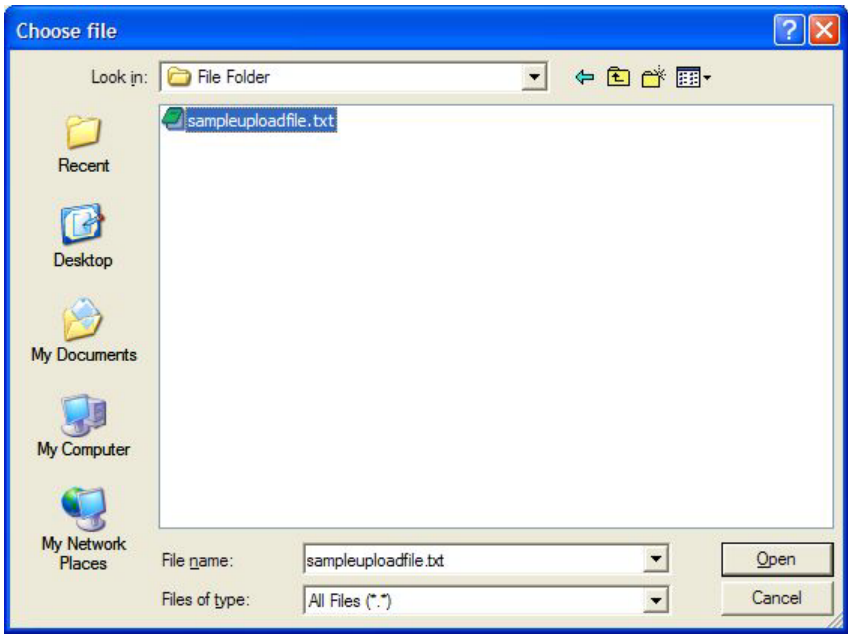
Page Error(s)
Please enter all required values.
Please select number of funding years for your organization.

10.d. Uploading Attachments

All attachments submitted via GMS must not contain confidential/sensitive data that is not required to support the grants-management process. Before attachments are uploaded, sensitive information must be redacted. Examples of sensitive information include social security numbers (even if it is only the last 4 digits of an SSN), items such as bank account numbers (generally found at the bottom of a check), or credit card data.

When not enough space is available to capture the type of information that is required on a form, a file upload feature is available that allows a file to be attached. The following file types are allowed: bmp, doc, docx, gif, jpg, pdf, png, ppt, tif, txt, wpd, xls, xlsx. To locate and upload a file, select "Browse."

Go to the folder that contains the file, select the file, and "Open."



After the page reloads, select "Save".

10.e. Printing (PDF)

On many pages a "Print Version" button is available that automatically creates a printable Portable Document Format (PDF) version. This dynamic PDF can be printed, or saved to a computer. It is good practice to review the PDF files carefully for accuracy prior to submitting.

10.f. Copy and Paste Restrictions

Be cautious when using the copy and paste function of most word processing programs (e.g., MS Word) to transfer text into GMS form fields or narrative text boxes.

GMS does not recognize some characters and formatting, such as tables, graphs, photographs, bullets, and some tabs.

Also be aware of the different character limits of text boxes--attempting to copy and paste text that is longer than the allotted space returns an error message. The character limit is located at the bottom left of a text box.

To avoid copy/paste errors, first copy and paste the text into Notepad or equivalent program. Notepad has similar formatting requirements to GMS textboxes.

11. Proposal Submission

The Project Director is the only one authorized to submit a Proposal. When the Proposal is complete and no additional changes are required, the Project Director may submit.

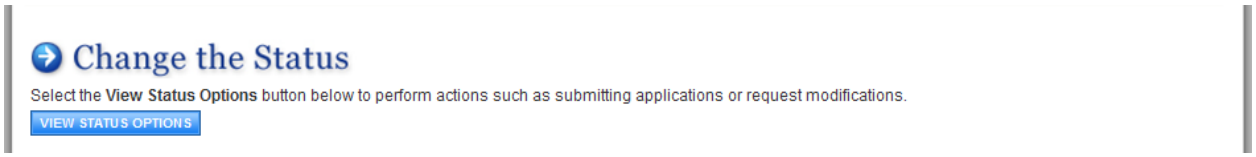
Once an Application has been submitted, it becomes 'read-only' and can no longer be changed!

To submit a proposal, the Project Director selects "View Status Options" under the Change the Status header on the proposal's main menu. Possible status changes display. Select "Apply Status" under the appropriate status change. If errors exist on any of the proposal's forms when attempting to submit, a message appears showing the form(s) that contain errors. All errors must be fixed before GMS will accept the application. When errors do not exist, Project Director is prompted to confirm decision to submit.

Note about Global Errors always showing for Title Page and Budget Request by Resource:

Upon submission, you will receive a Global Error about the Budget Request by Resource and Title Page. There is data on both of these pages which is pre-populated from the Budget, so the system enforces you to revisit/resave these two pages to populate that data, since you will most likely complete the budget after completing these pages.

Once this is complete, you will need to re-submit the document since it was not successfully submitted the first time, due to the above errors.



Document Information: 2010-JG-City of Columbus Police-00002

Details

You must complete this page.
Budget Request By Resource

You must complete this page.
Collaboration Board

You must complete this page.
Confidential Funds (Applies to Drug Task Force Projects Only)

You must complete this page.
Consultants/Contracts

You must complete this page.
Equipment

You must complete this page.
Executive Summary