**GrantTrak**

Mississippi  
Department

Of Employment  
Security

**Subrecipient User Manual**



Revision 1, MM/DD/YYYY

GrantTrak Manual

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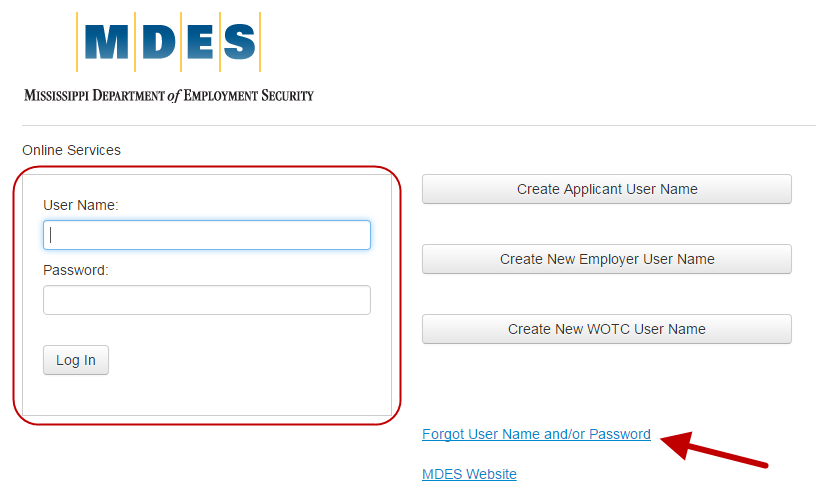
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[Rejecting Status Changes 54](#_Toc478979531)

Basics

Logging in to GrantTrak

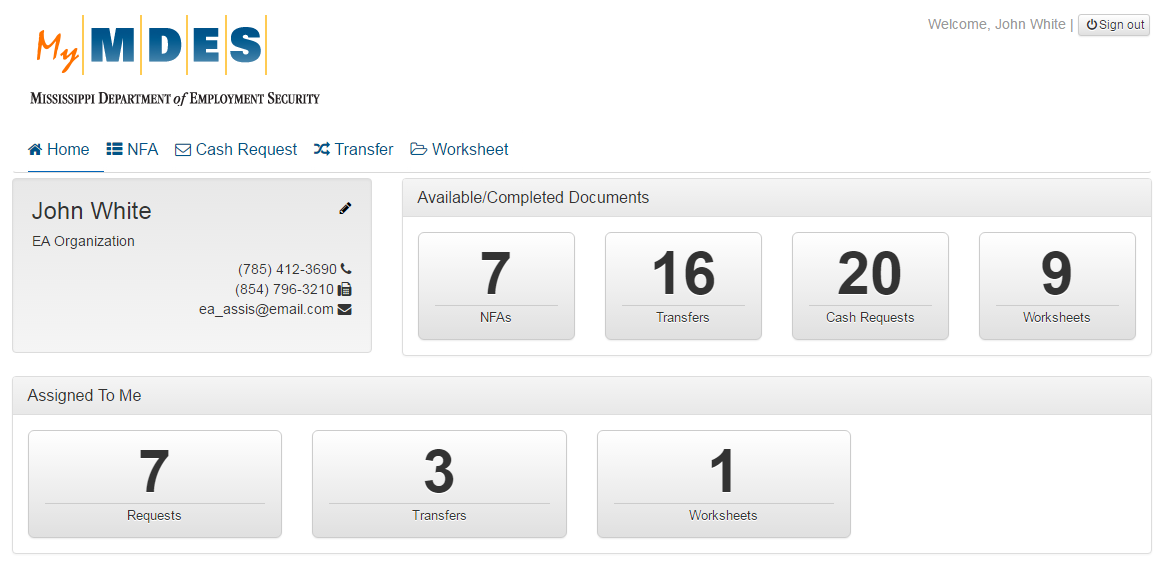
**Type your username and password in the login box and click Log In.**



If you do not have a username and password, you must ask your manager to register an account for you. You will not be able to register for a staff login yourself.

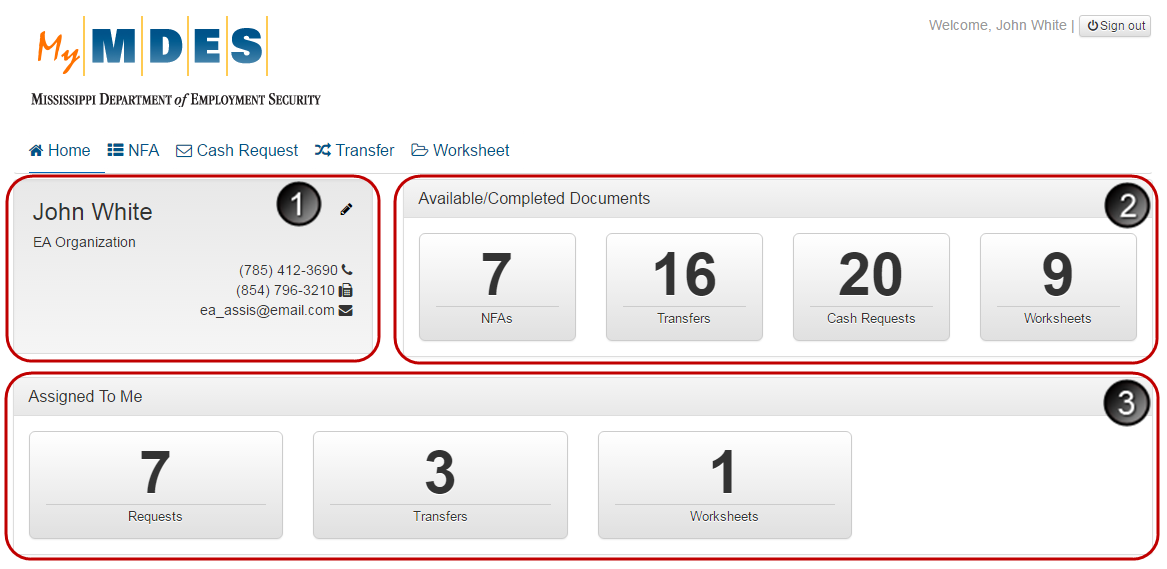
If you have forgotten your username or password, click the **Forgot Username and/or Password** link.

**Dashboard**



See the [next section](#home_page) for details on the Dashboard.

Home Page



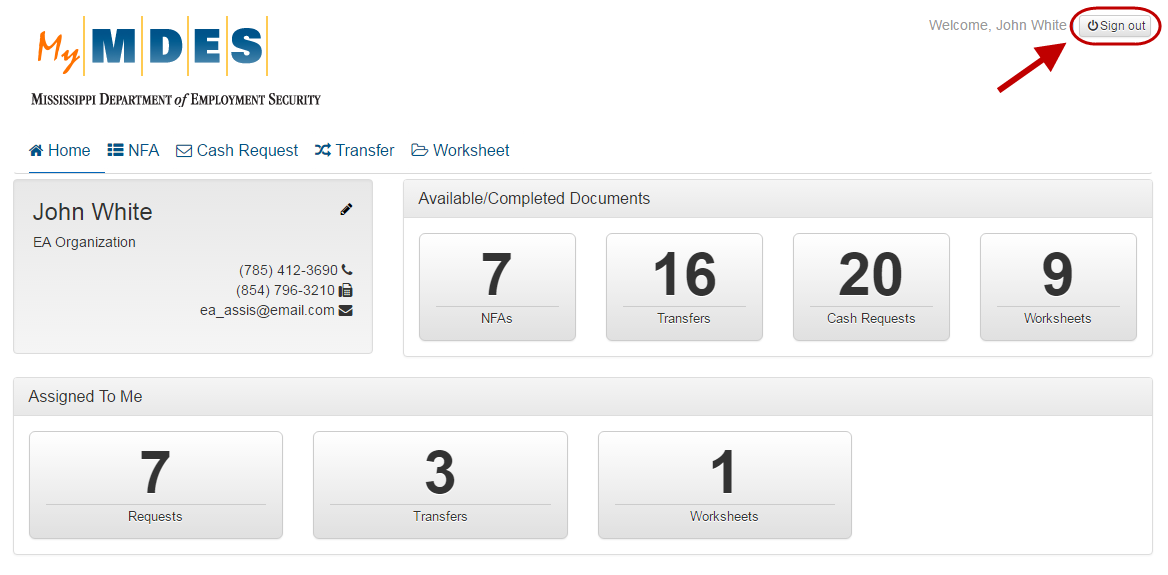
The **Home** page with the Dashboard is the first screen users see after logging in. The Dashboard allows the users to view the following:

1. Name, organization and contact information of the currently logged-in user.
2. **Available/Completed Documents** – The total number of NFAs, Transfers, Cash Requests, and Worksheets available to the logged-in user.
3. **Assigned To Me** – The number of items assigned to the logged-in user.

Clicking any number on the Dashboard will navigate you to the corresponding search results page, filtered accordingly.

**NOTE:** The number of available sections that are displayed on the **Home** page depends on your role in the system.

Logging Out

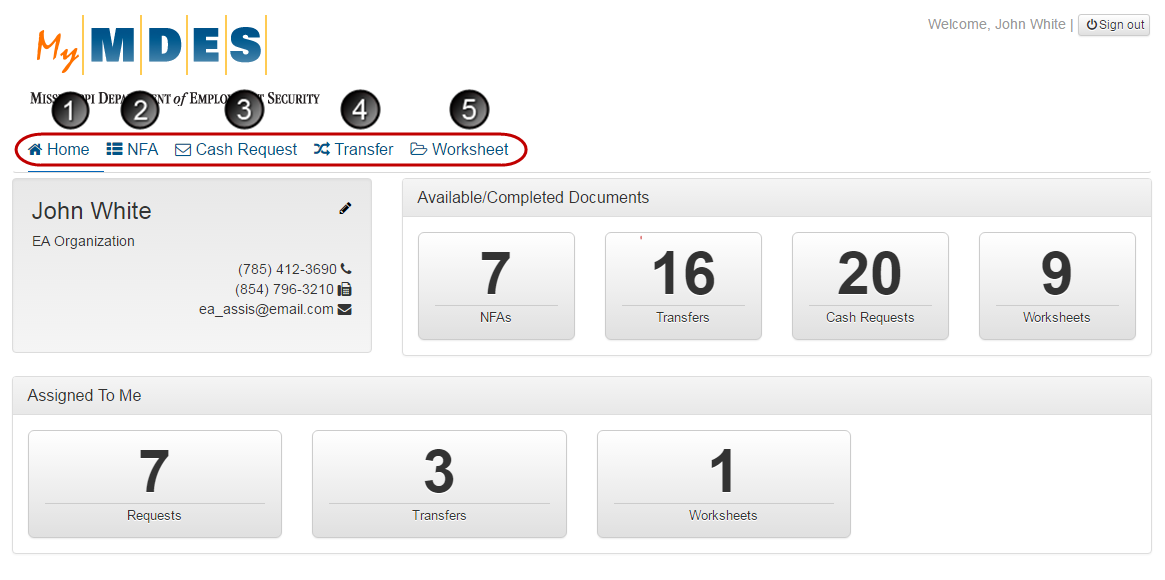


The **Sign out** button is located in the top-right corner of every screen.

GrantTrak Navigation

Top Navigation

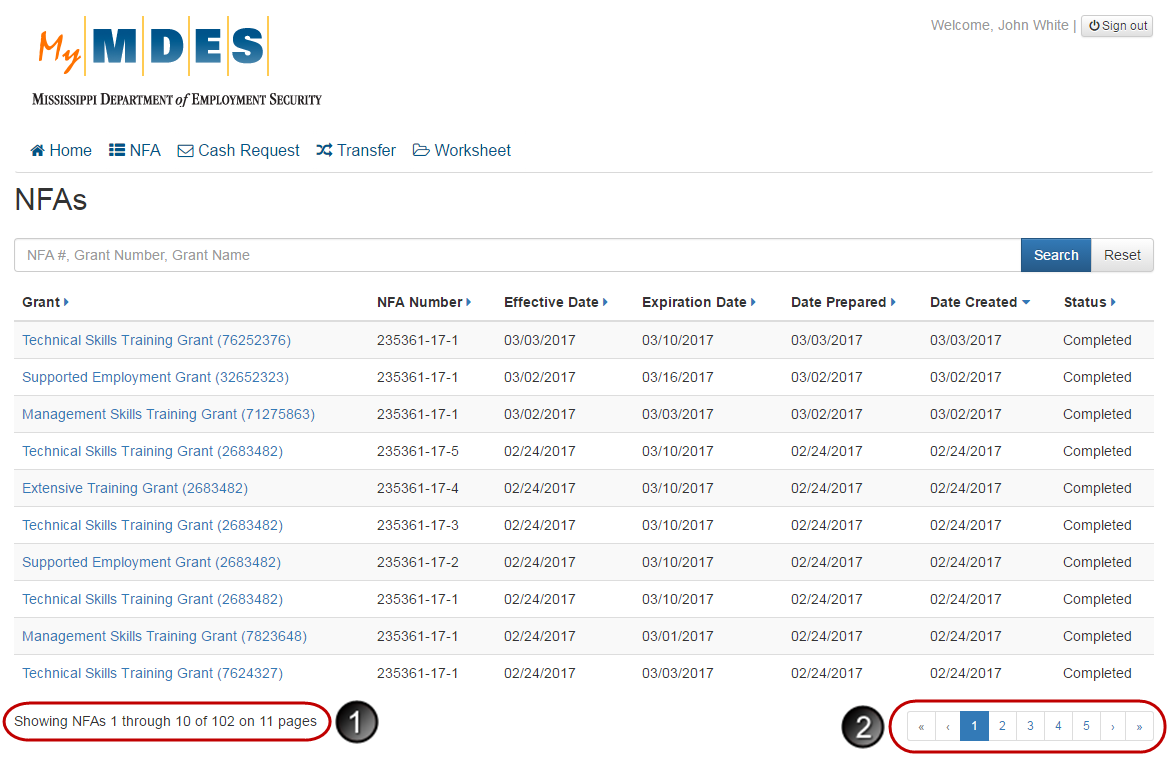
**Top Navigation Menu**



All GrantTrak features and functions can be reached from the top menus at any time during a session. The top menus are (1) **Home**, (2) **NFA**, (3) **Cash Request**, (4) **Transfer**, (5) **Worksheet**. Clicking each menu link will display the appropriate screen related to this menu.

**NOTE:** The number of available menus depends on your role in the system.

Search Results Screen



Clicking any menu link on the top navigation bar, except for **Home**, will display the appropriate search results screen.

1. The line to the bottom left of the screen indicates the total number of search result items and the number of items displayed on the page.
2. The line to the bottom right of the screen contains the following pagination options:

* **<< (First)**: Opens the first screen of search results.
* **< (Prev)**: Navigates to the previous screen of search results.
* **Numbers** **(1, 2, 3, etc.)**: Navigates to the corresponding screen of search results.
* **> (Next)**: Navigates to the next screen of search results.
* **>> (Last)**: Opens the last screen of search results.

View, Search, Creation, and Edit Screens

**Buttons Overview**

**Return to Search** navigates to a **Search Results** screen.

**Search** displays search records according to the entered criteria.

**Reset** returns the search results screen to a default state.

**Cancel** returns to the previous screen. If **Cancel** is clicked on a creation or edit screen, any changes made to the form will be discarded.

**Delete** removes the currently selected record.

**Create** appears on search results and view screens and allows users to create records.

**Save** appears on edit and creation screens and allows users to save changes or add a record.

**Print** allows users to print the currently displayed record.

**Submit** allows users to change a status of a record.

**View History** displays a history of status changes for a record.

**Recalculate Totals** adjusts the read-only values on screens according to the entered amount.

**Search Screen Buttons**



**View Screen Buttons**





**Creation and Edit Screen Buttons**

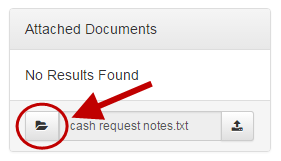


Global Features and  
Functions

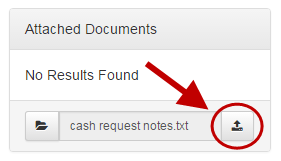
Attachments

Documents can be attached on several view screens in the system. To attach a document:

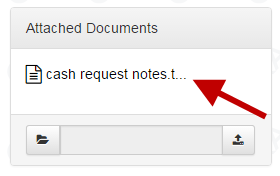
**Step 1: Click the Folder icon and select the required file from your local directory.**



**Step 2: Once selected, click the Upload icon.**



The attached file will appear in the **Attached Documents** section. To download an attachment, click the attachment link.

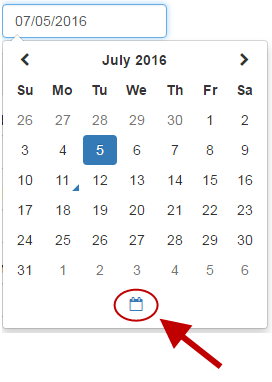


**NOTES:**

* Only the following file types can be attached on view screens: .csv, .pdf, .txt, .doc, .docx, .xls, .xlsx. The size of the attached file cannot be greater than 10 MB.
* Subrecipient users can only delete attachments that they added.

Calendars and Dates

**Calendar Picker Menu**



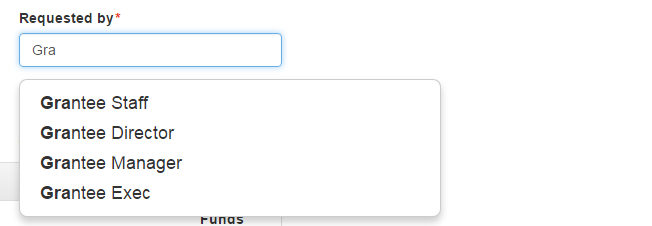
Clicking a date input field will open a calendar picker where you can choose a month, year, and day. If it is required to enter the current date, click the calendar icon to complete the field with the current date.

Dates can also be entered as the following (m =Month, d= Day, y=Year):

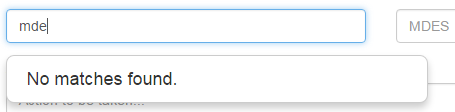
* 1st [etc.]
* 1st Jan [etc.]
* 1st Jan 2006 [etc.] Jan 1st [etc.]
* Jan 1st 2006 [etc.]
* mm/dd/yyyy
* mm-dd-yyyy
* mmddyyyy
* mmddyy
* mm.dd.yyyy
* yyyy-mm-dd
* mm/yyyy
* mm-yyyy
* mm.yyy
* yyyy/mm
* yyyy-mm
* yyyy.mm

Selection Dropdown

**Dropdown List**



To complete some of the fields in the system, it is required to select an option from a dropdown list. To display a dropdown list of available matches, type the first 3 characters in the field. If there are no available options for the entered criteria, the ‘No Matches Found.’ message will display.

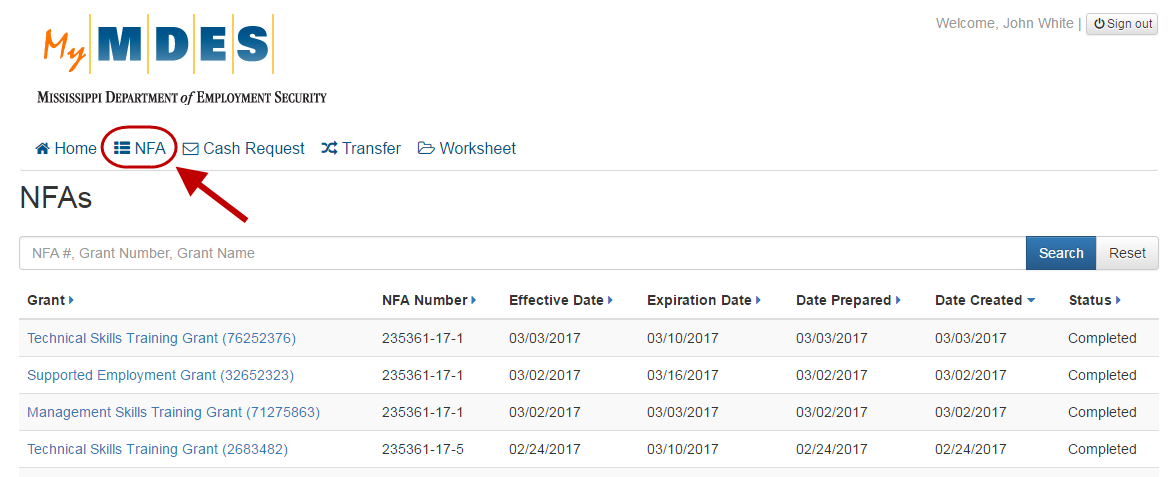


Notices of Fund Availability

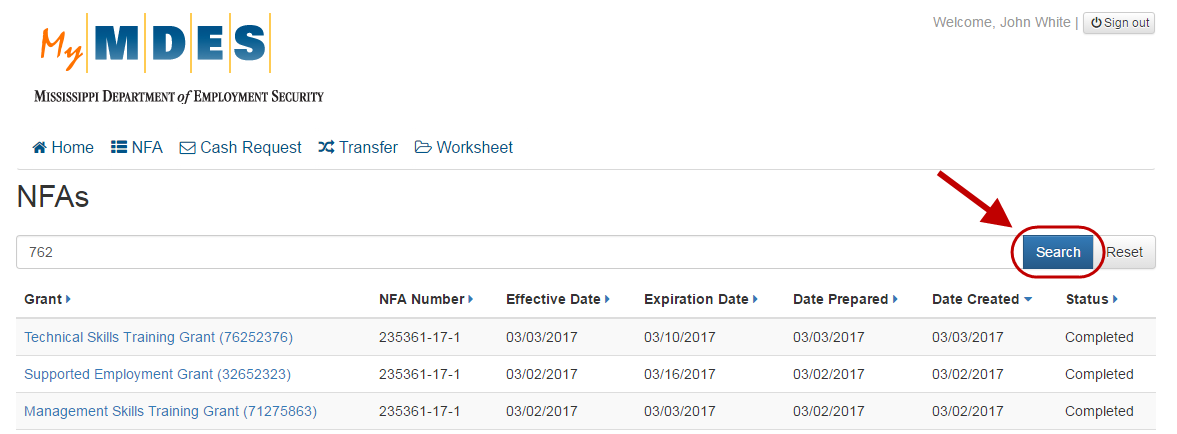
Searching for a Notice of Fund Availability

Grantee Staff members, Grantee Managers, Grantee Directors, Grantee Executives, and Board Chairmen can search for NFAs that have the ‘Completed’ status.

**Step 1: Click NFA.**



**Step 2: Type an NFA number, grant number or grant name and click Search.**



**Search Results Screen**



**NOTE**: By default, records in the grid are sorted by the **Date Created** column, but can be sorted by other column criteria.

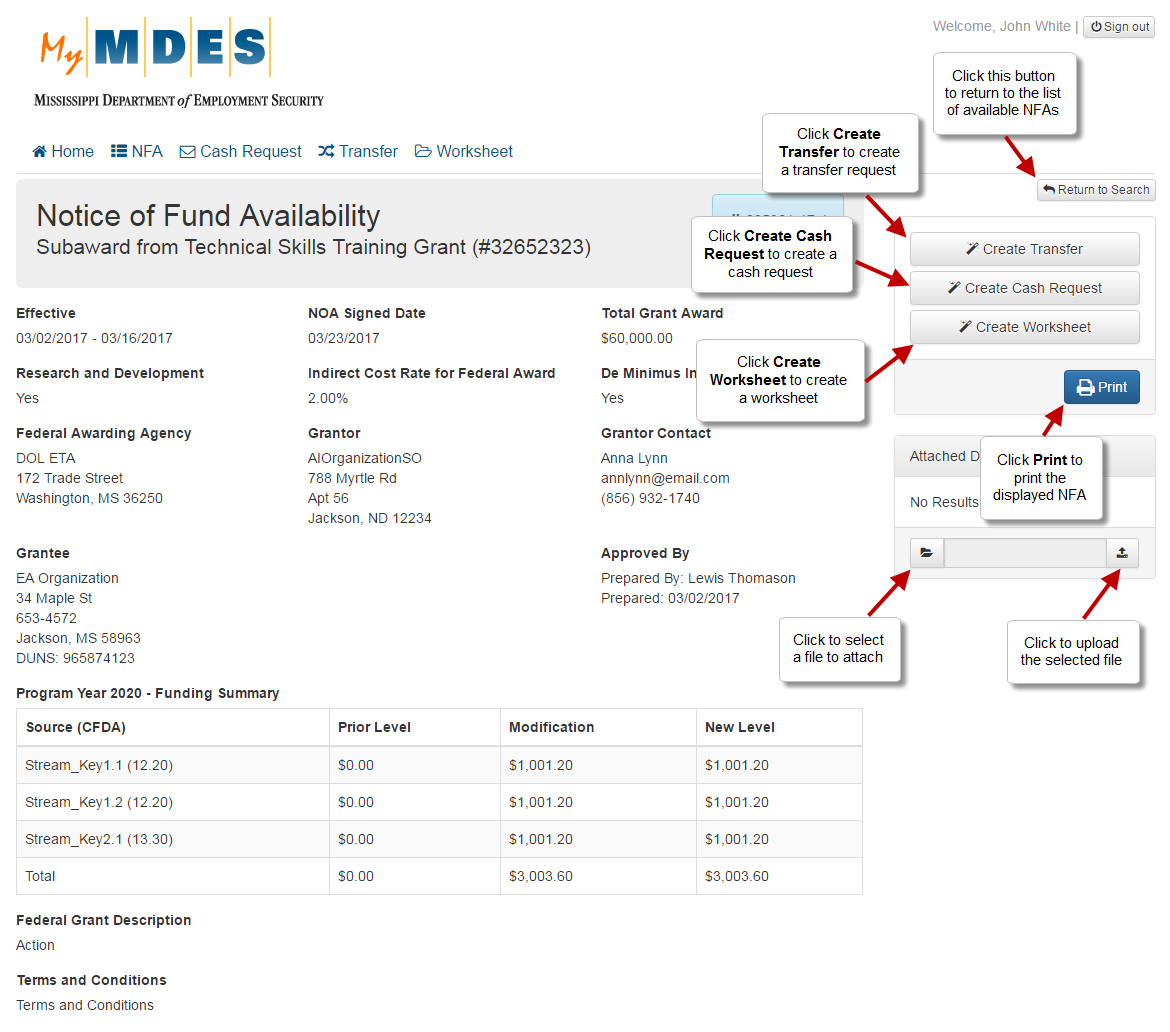
Clicking any grant name in the search results will open the corresponding Notice of Fund Availability View screen. For more details, refer to the [Viewing a Notice of Fund Availability](#view_NFA) section.

Viewing a Notice of Fund Availability

Grantee Staff members, Grantee Managers, Grantee Directors, Grantee Executives, and Board Chairmen can view NFAs that have the ‘Completed’ status.

To open a Notice of Fund Availability View screen with associated details, click the grant name in the search results list. For details on how to search for an NFA, refer to the [Searching for a Notice of Fund Availability](#search_NFA) section.

**Notice of Fund Availability View Screen**

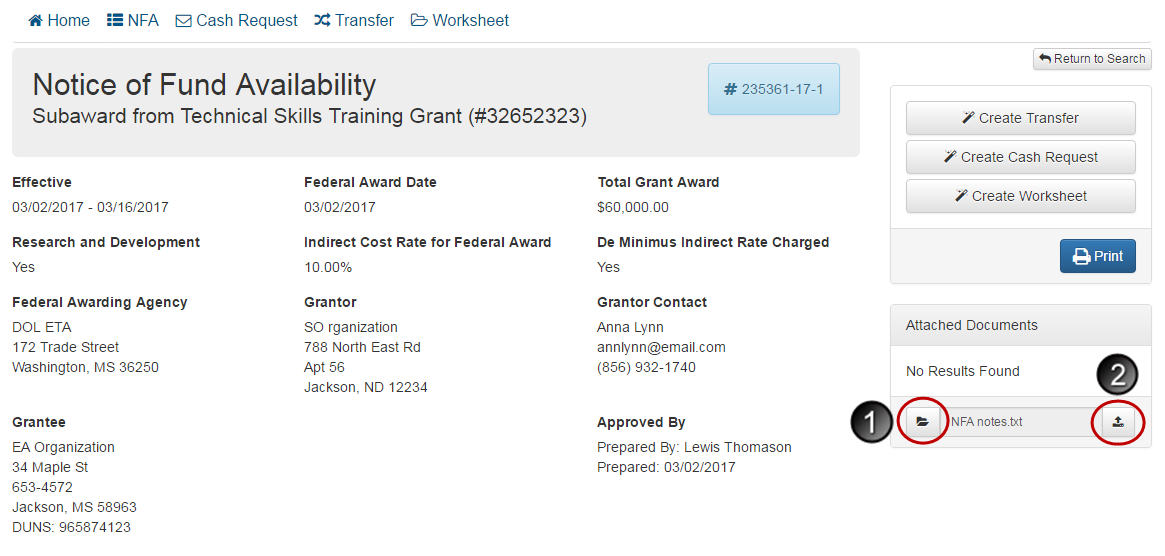


The NFA View screen provides access to the information about the NFA, related actions and documents in the GrantTrak system.

**NOTE:** The number of available actions on the NFA View screen depends on your role in the system.

**Attach Documents to an NFA**

On an NFA View screen, you can attach documents to the selected NFA. To attach a document:



1. Click the folder icon and select the required document from your local directory.
2. Click the upload icon to attach the selected file.

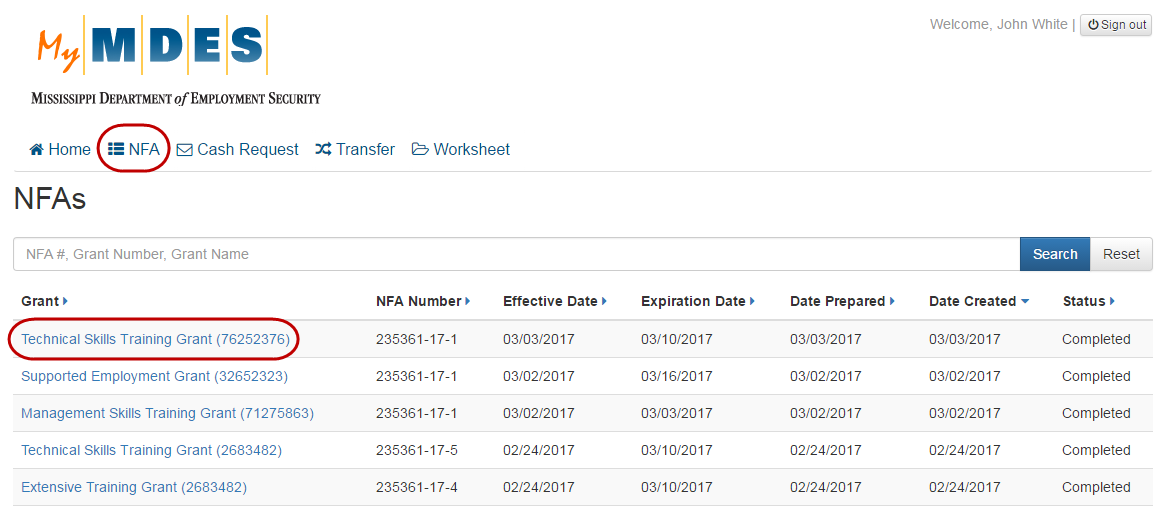
Cash Request

Creating a Cash Request

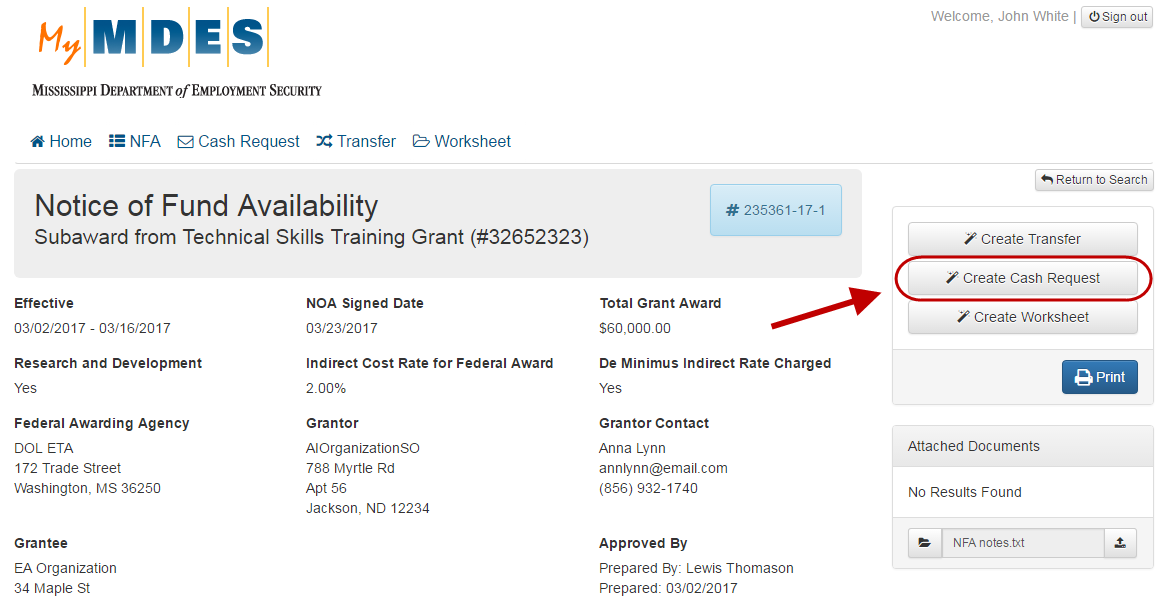
Grantee Staff members, Grantee Managers, Grantee Directors and Grantee Executives can create cash requests.

Cash requests are created from the Notice of Fund Availability View screen for NFAs associated with your current organization. For details on other actions available for an NFA, refer to the [Viewing a Notice of Fund Availability](#view_NFA) section.

**Step 1: Click NFA and select the required NFA from the list, from which you want to create a cash request.**



**Step 2: On the NFA View screen, click Create Cash Request.**



**Step 3: Complete the fields on the New Cash Request screen and click Save.**

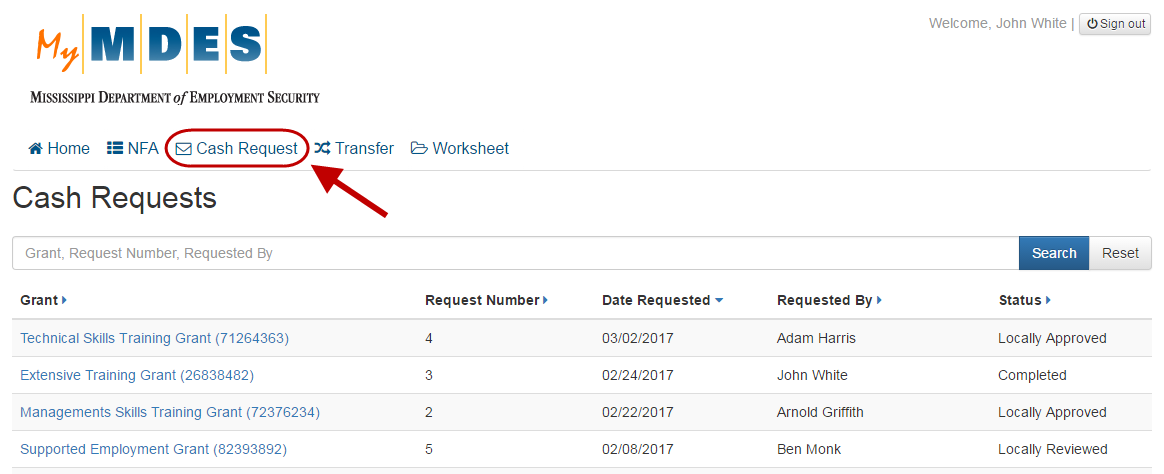


**NOTE:** Use the **Recalculate Totals** button to recalculate the remaining amount according to the entered request value.

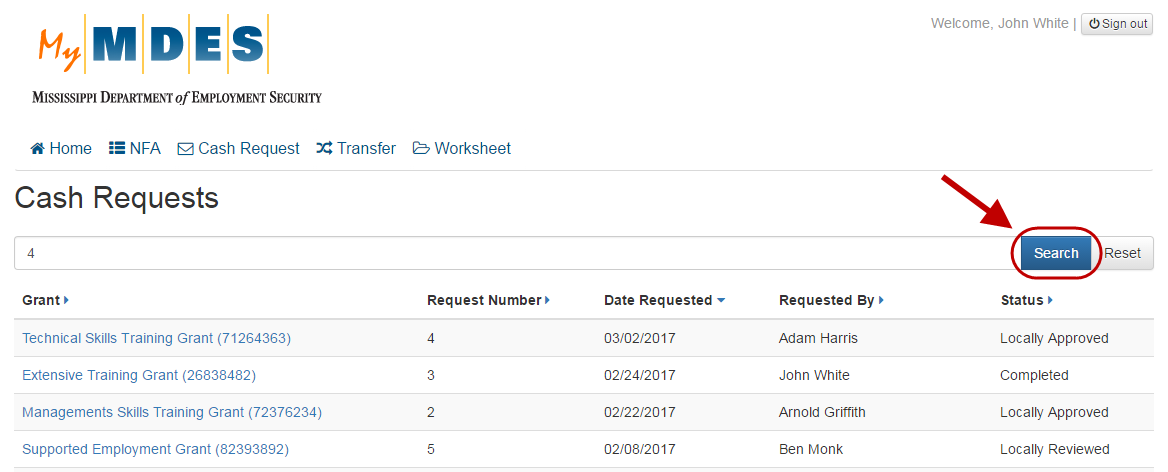
Searching for a Cash Request

Grantee Staff members, Grantee Managers, Grantee Directors, and Grantee Executives can search for cash requests.

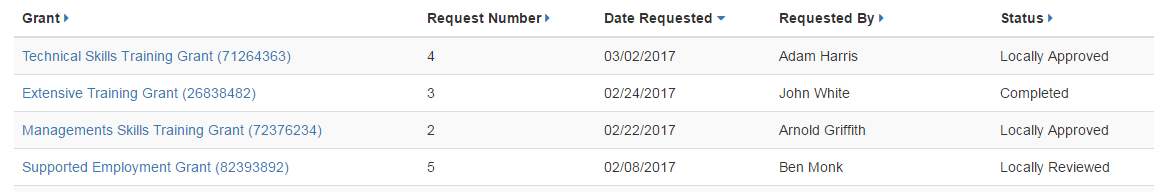
**Step 1: Click Cash Request.**



**Step 2: A Requests screen will appear. Type a grant number/name, a request number or a requester name and click Search.**



**Search Results Screen**



**NOTE**: By default, records in the grid are sorted by the **Date Requested** column, but can be sorted by other column criteria.

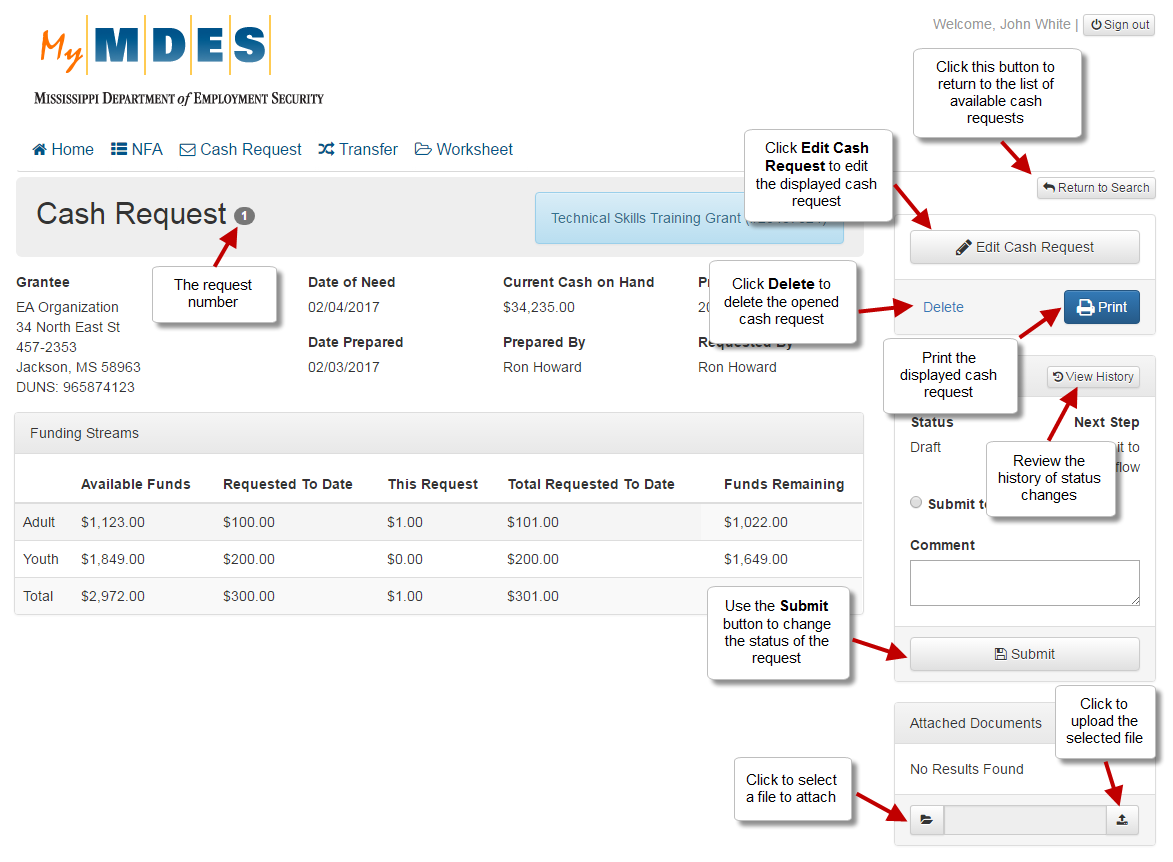
Clicking any grant name in the search results will open the corresponding Cash Request View screen. For more details, refer to the [Viewing a Cash Request](#view_cash_request) section.

Viewing a Cash Request

Grantee Staff members, Grantee Managers, Grantee Directors, and Grantee Executives can view cash requests in any status. Board Chairmen can only view NFAs that have the ‘Completed’ status.

To open a Cash Request View screen with associated details, click the grant name in the search results list. For details on how to search for a cash request, refer to the [Searching for a Cash Request](#search_cash_request) section.

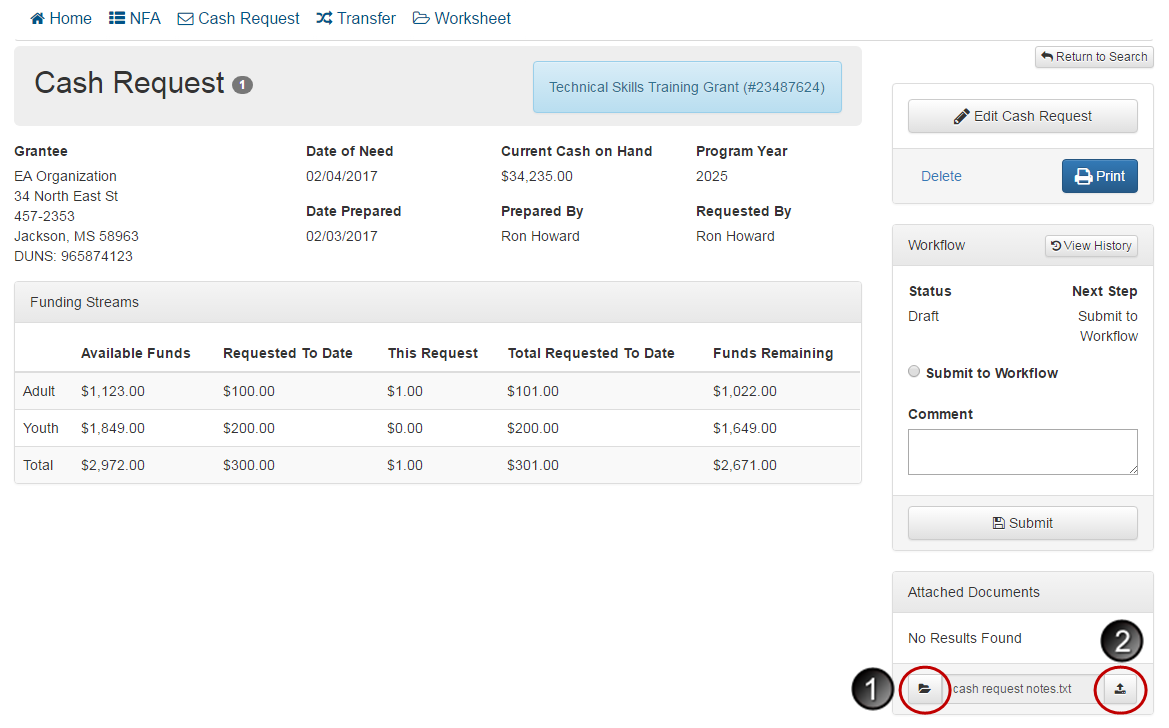
**Cash Request View Screen** (for the following user roles: Grantee Staff members, Managers, Directors and Executives)



**NOTE:** The number of available actions on the screen depends on the status of the cash request.

**Attach Documents to a Cash Request**

On a Cash Request View screen, you can attach documents to the selected cash request. To attach a document:



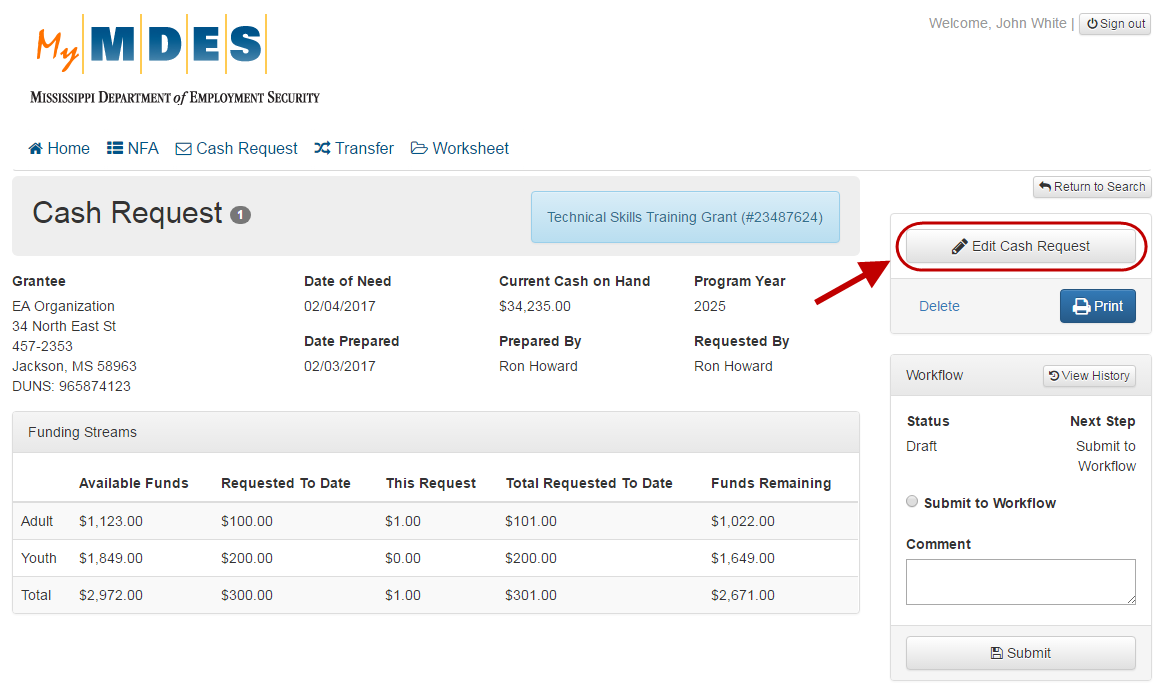
1. Click the folder icon and select the required document from your local directory.
2. Click the upload icon to attach the selected file.

Editing a Cash Request

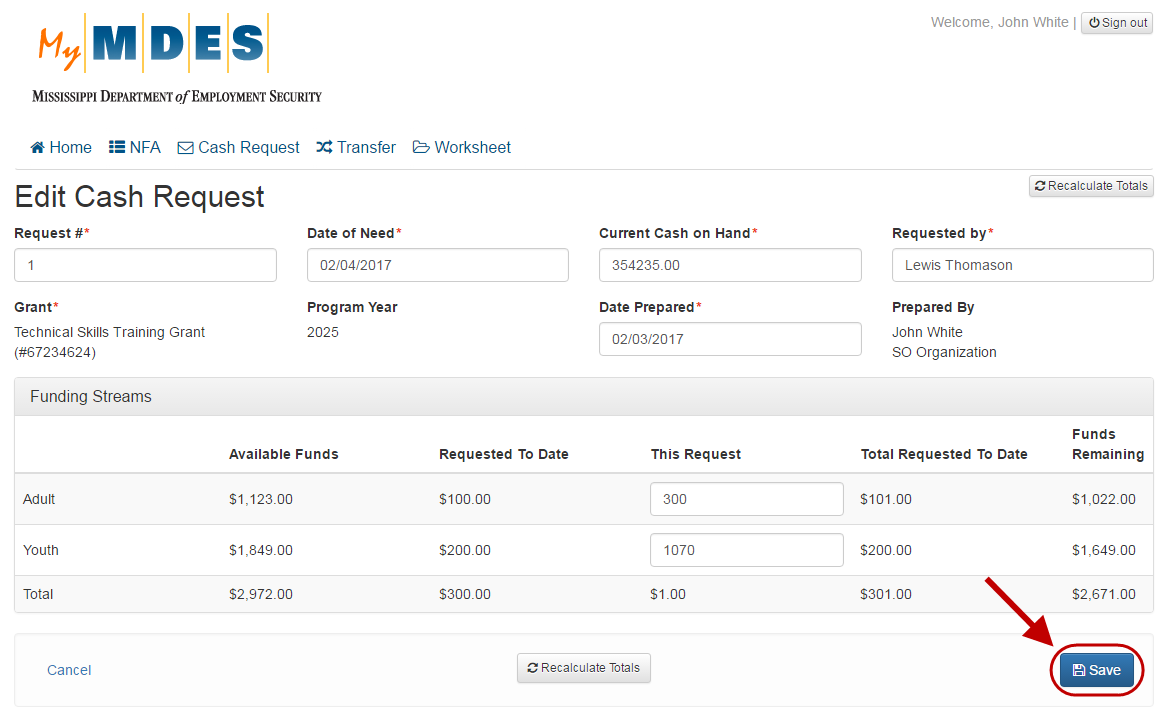
Grantee Staff members, Grantee Managers, Grantee Directors and Grantee Executives can edit cash requests that have a status of ‘Draft’.

Information related to a cash requestcan be modified from the associated Cash Request View screen. For details on other functions available for cash requests, refer to the [Viewing a Cash Request](#view_cash_request) section.

**Step 1: Click the Edit Cash Request button on the Cash Request View screen.**



**Step 2: Edit information as necessary and click Save.**

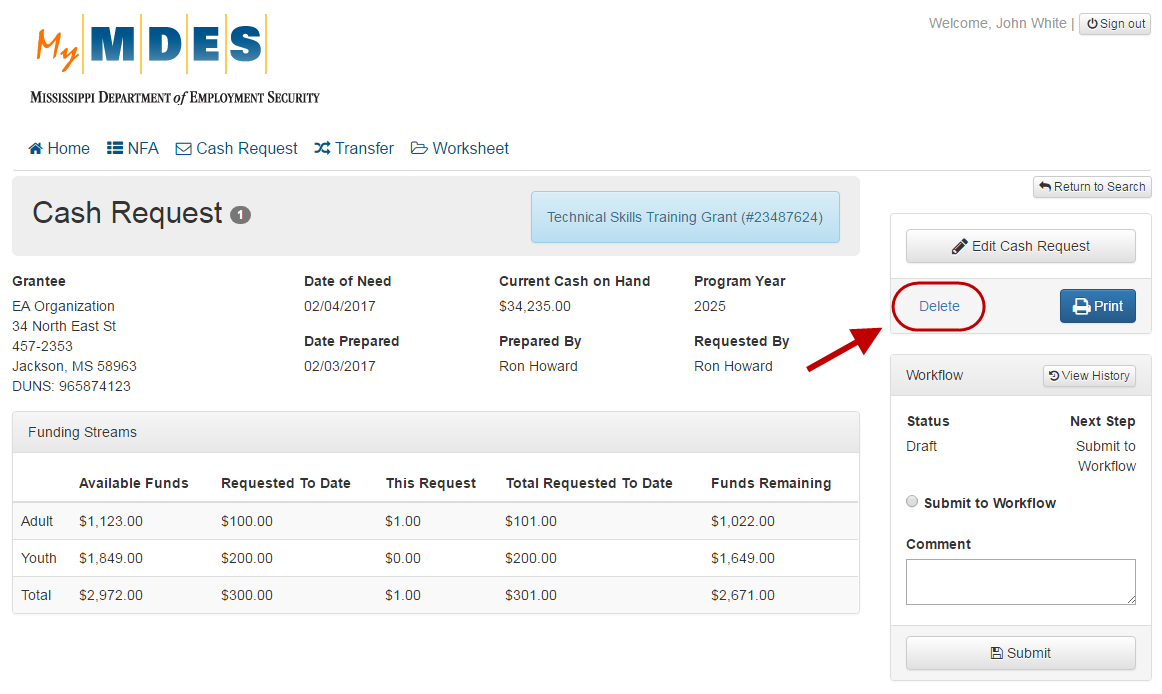


Deleting a Cash Request

Grantee Staff members, Grantee Managers, Grantee Directors and Grantee Executives can delete cash requests that have a status of ‘Draft’.

Information related to a cash requestcan be deleted from the associated Cash Request View screen. For details on other functions available for cash requests, refer to the [Viewing a Cash Request](#view_cash_request) section.

**Step 1: Click the Delete link on the Cash Request View screen.**



**Step 2: Click Yes to confirm the removal.**

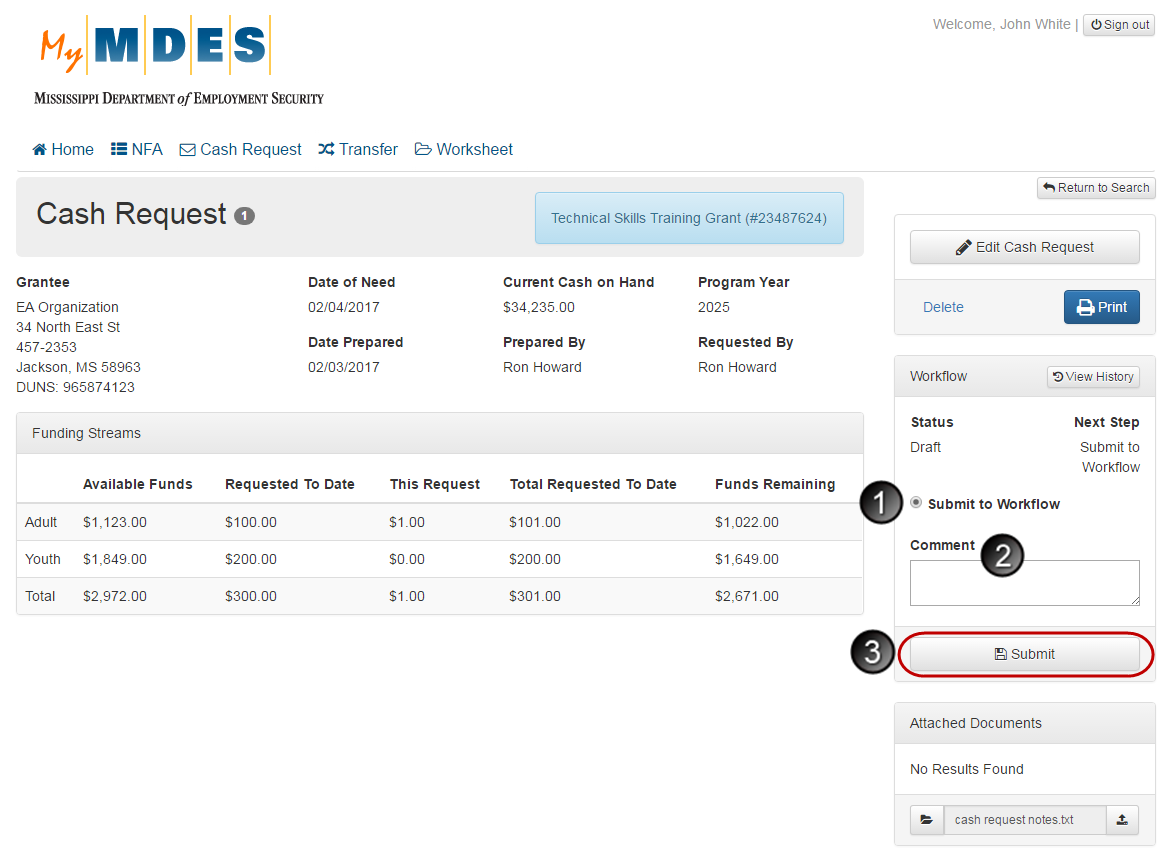


Submitting a Cash Request to Workflow

Grantee Staff members, Grantee Managers, Grantee Directors and Grantee Executives can submit cash requests to Workflow.

In order to initiate the process of approving a cash request, it must be submitted to Workflow from the associated Cash Request View screen. For details on other actions available for cash requests, refer to the [Viewing a Cash Request](#view_cash_request) section.

**Submit a Cash Request to Workflow**



To submit a cash request to Workflow:

1. Select **Submit to Workflow** in the **Workflow** section.
2. Enter a comment in the **Comment** field.
3. Click the **Submit** button.

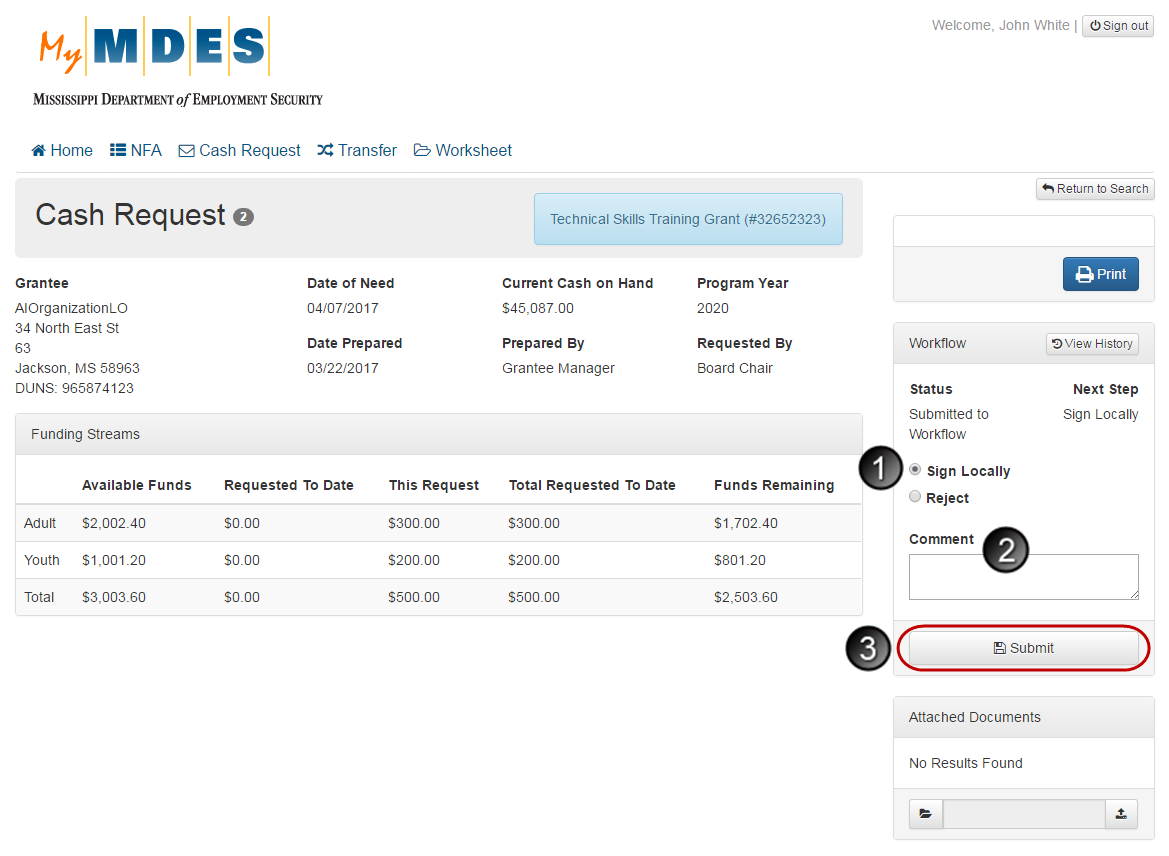
**NOTE**: Clicking **Submit** will change the status from ‘Draft to ‘Submitted to Workflow’.

Signing a Cash Request

Grantee Managers, Grantee Directors and Grantee Executives can locally sign cash requests that have a status of ‘Submitted to Workflow’.

Cash requests can be signed from the associated Cash Request View screen. For details on other actions available for cash requests, refer to the [Viewing a Cash Request](#view_cash_request) section.

**Sign a Cash Request**



To sign a cash request:

1. Select **Sign Locally** in the **Workflow** section.
2. Enter a comment in the **Comment** field.
3. Click the **Submit** button.

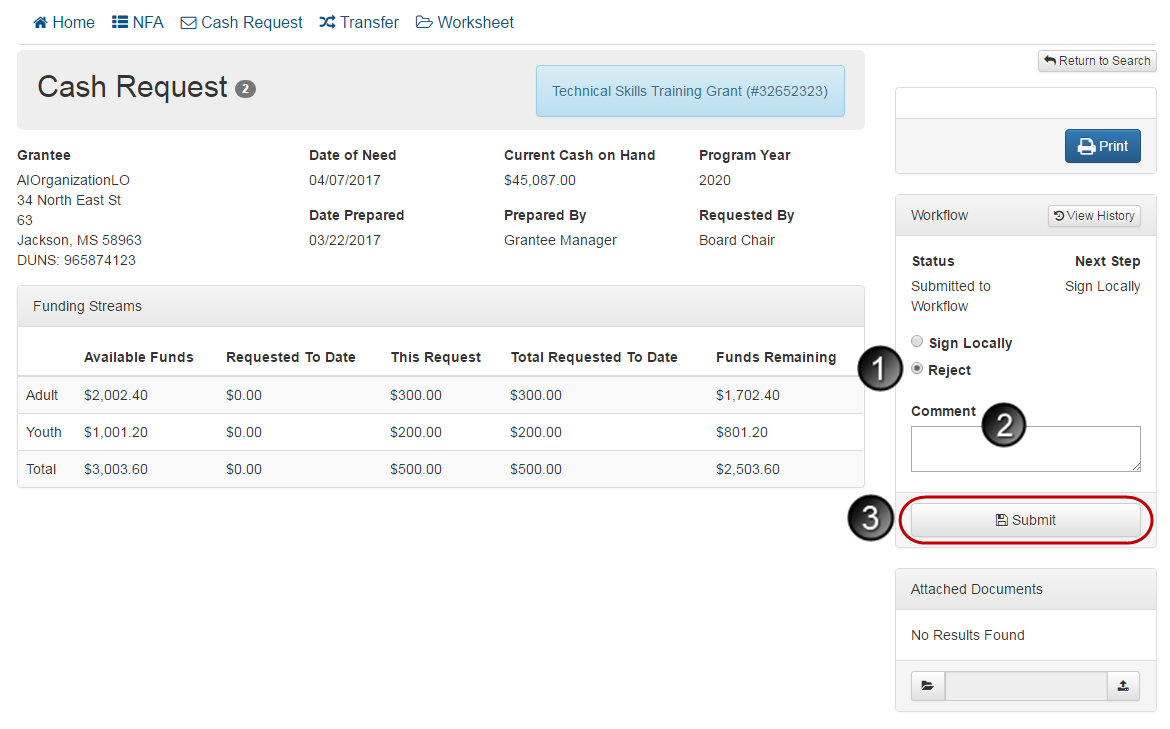
**NOTE**: Clicking **Submit** will change the status to ‘Locally Signed’.

Once the cash request has been locally signed, further status changes (state review and approval) are available only to State Office users.

Rejecting Status Changes

If necessary, a status change, which has been submitted, can be rejected.

**NOTE:** After a cash request has been locally signed, the status cannot be rejected.



To reject a status change:

1. Select **Reject** in the **Workflow** section.
2. Enter a comment in the **Comment** field.
3. Click the **Submit** button.

**NOTE**: Clicking **Submit** will change the status to ‘Draft’.

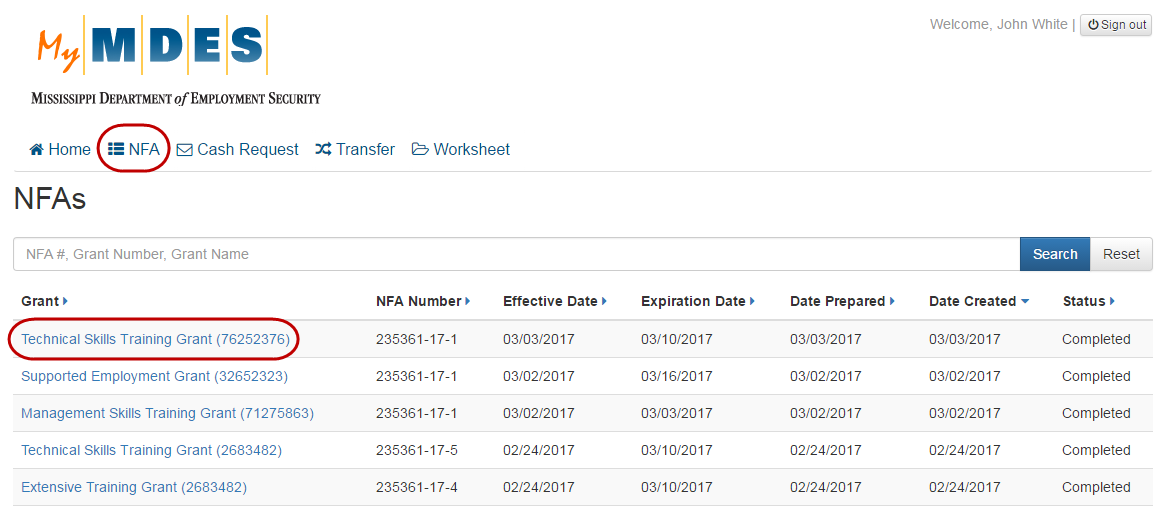
Transfer

Creating a Transfer

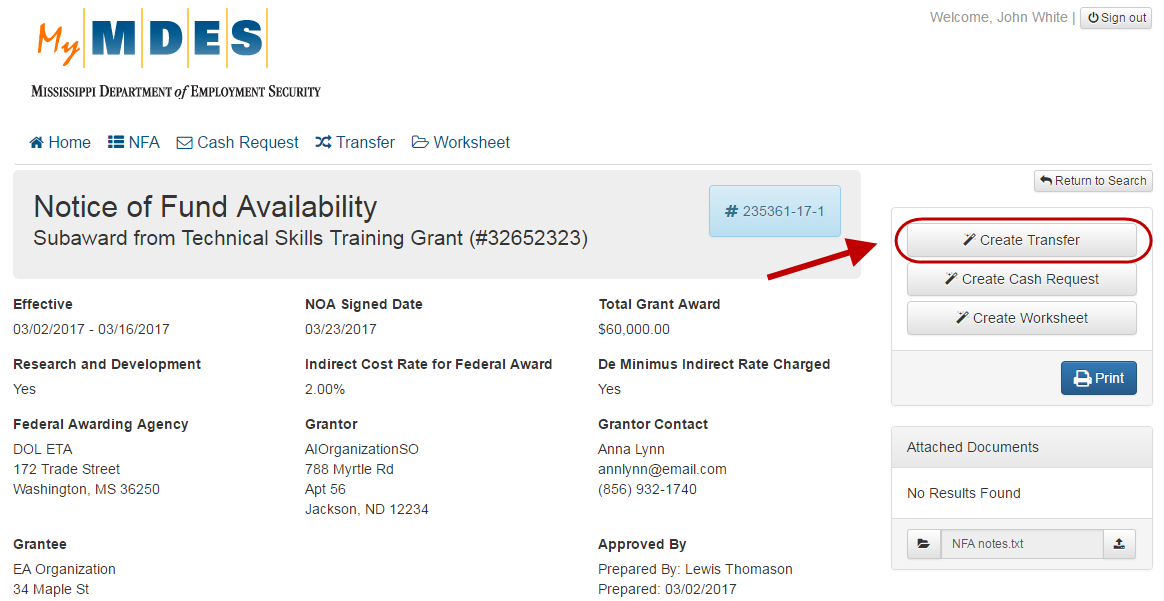
Grantee Staff members, Grantee Managers, Grantee Directors and Grantee Executives can create transfers.

Cash requests are created from the Notice of Fund Availability View screen for NFAs associated with your current organization. For details on other actions available for an NFA, refer to the [Viewing a Notice of Fund Availability](#view_NFA) section.

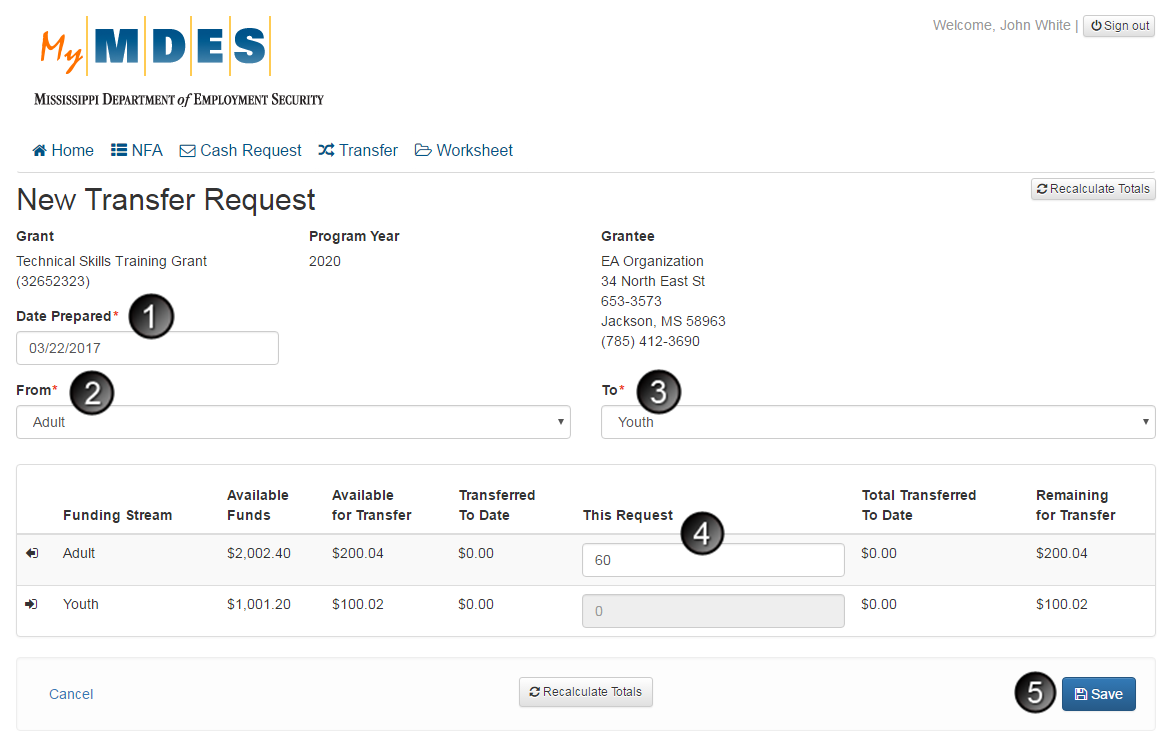
**Step 1: Click NFA and select the required NFA from the list, from which you want to create a transfer.**



**Step 2: On the NFA View screen, click Create Transfer.**



**Step 3: On the New Transfer Request screen, complete the fields and click Save.**



1. In the **Date Prepared** field, select the date for the transfer request.
2. Select the transfer source in the **From** field.
3. Select the transfer destination in the **To** field.
4. In the **This Request** column, enter the planned transfer amount.
5. Click **Save** to create the transfer.

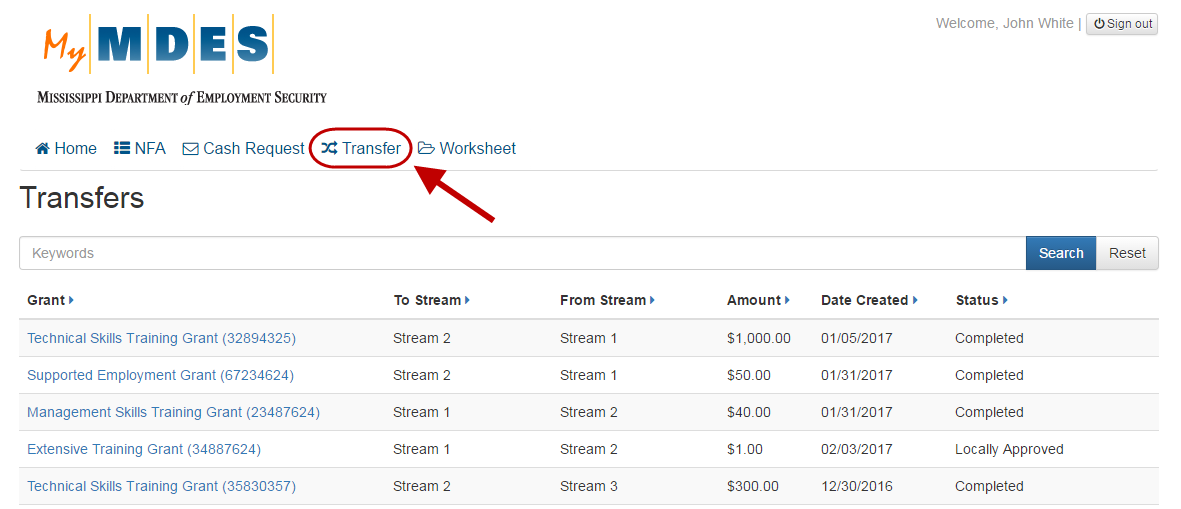
**NOTES:**

* Completing the **From/To** fields will display the corresponding funding stream details.
* Use the **Recalculate Totals** button to recalculate the remaining amount according to the entered request value.

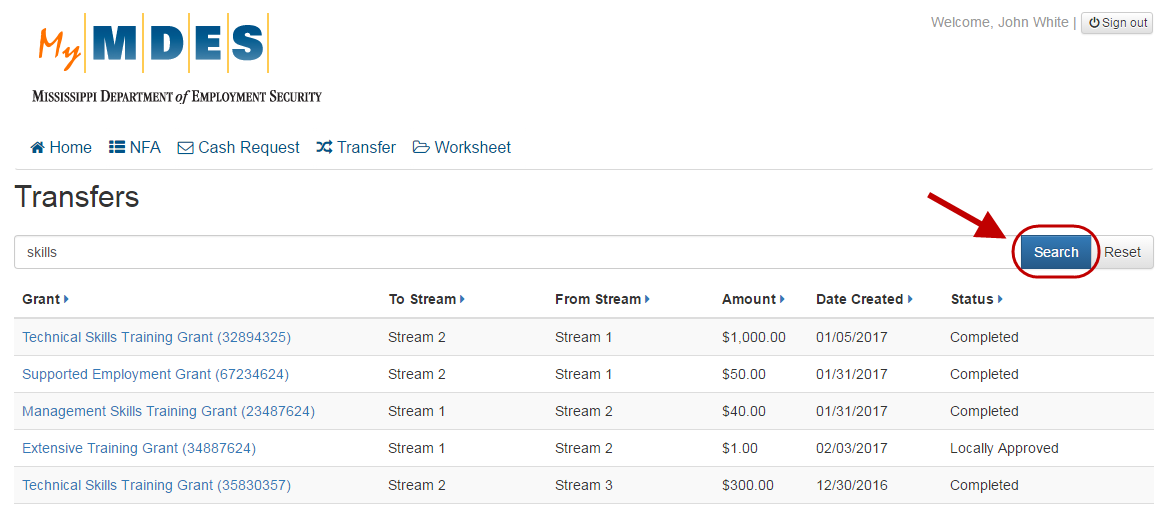
Searching for a Transfer

Grantee Staff members, Grantee Managers, Grantee Directors, Grantee Executives, and Board Chairmen can search for transfers.

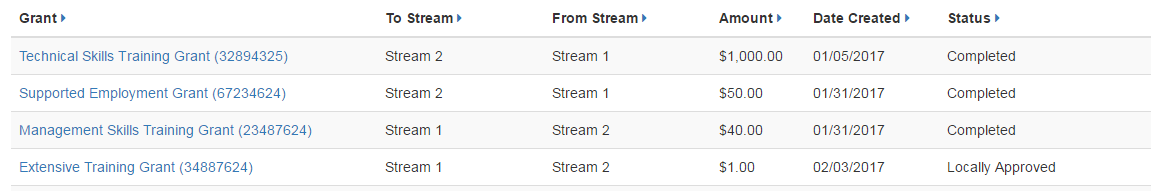
**Step 1: Click Transfer.**



**Step 2: Type a Transfer keyword and click Search.**



**Search Results Screen**



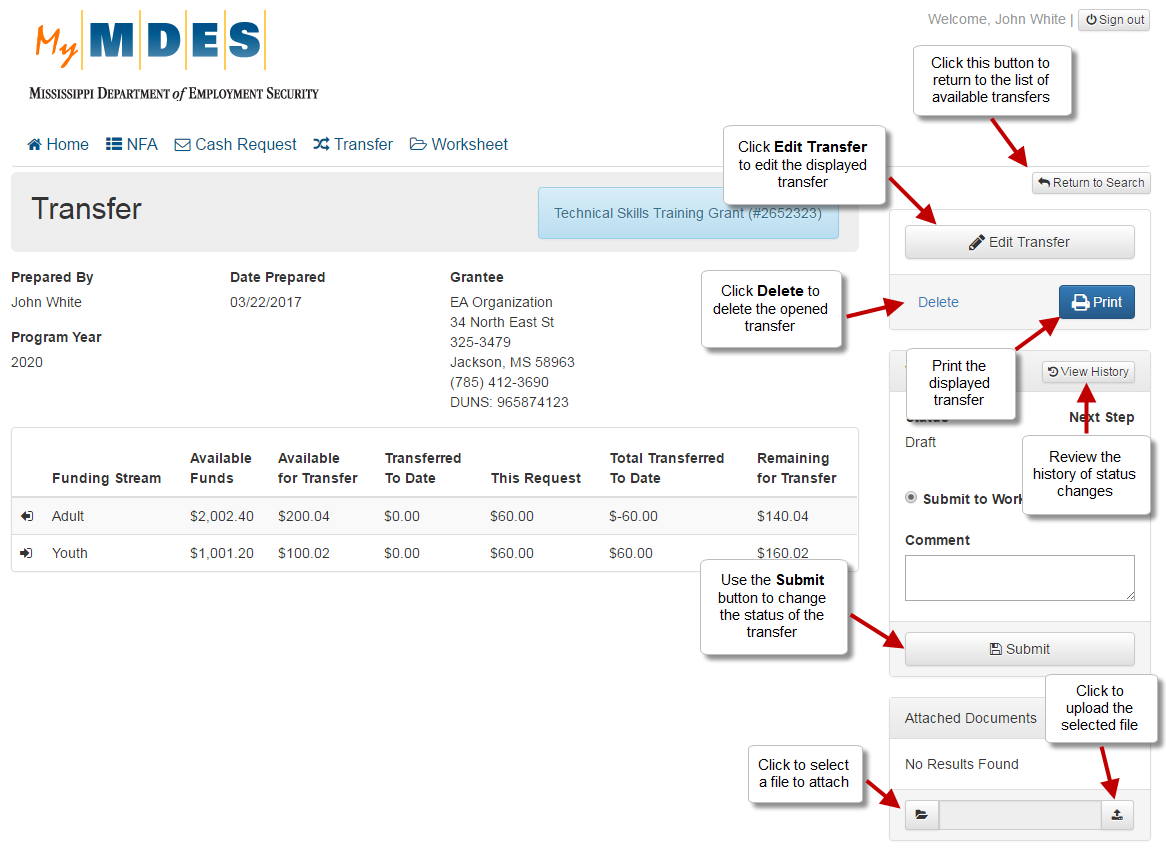
Clicking any grant name in the search results will open the corresponding Transfer View screen. For more details, refer to the [Viewing a Transfer](#view_transfer) section.

Viewing a Transfer

Grantee Staff members, Grantee Managers, Grantee Directors, Grantee Executives, and Board Chairmen can view transfers.

To open a Transfer View screen with associated details, click the grant name in the search results list. For details on how to search for a transfer, refer to the [Searching for a Transfer](#search_transfer) section.

**Transfer View Screen**



**NOTE:** The number of available actions on the screen depends on the status of the transfer.

**Attach Documents to a Transfer**

On a Transfer View screen, you can attach documents to the selected transfer. To attach a document:



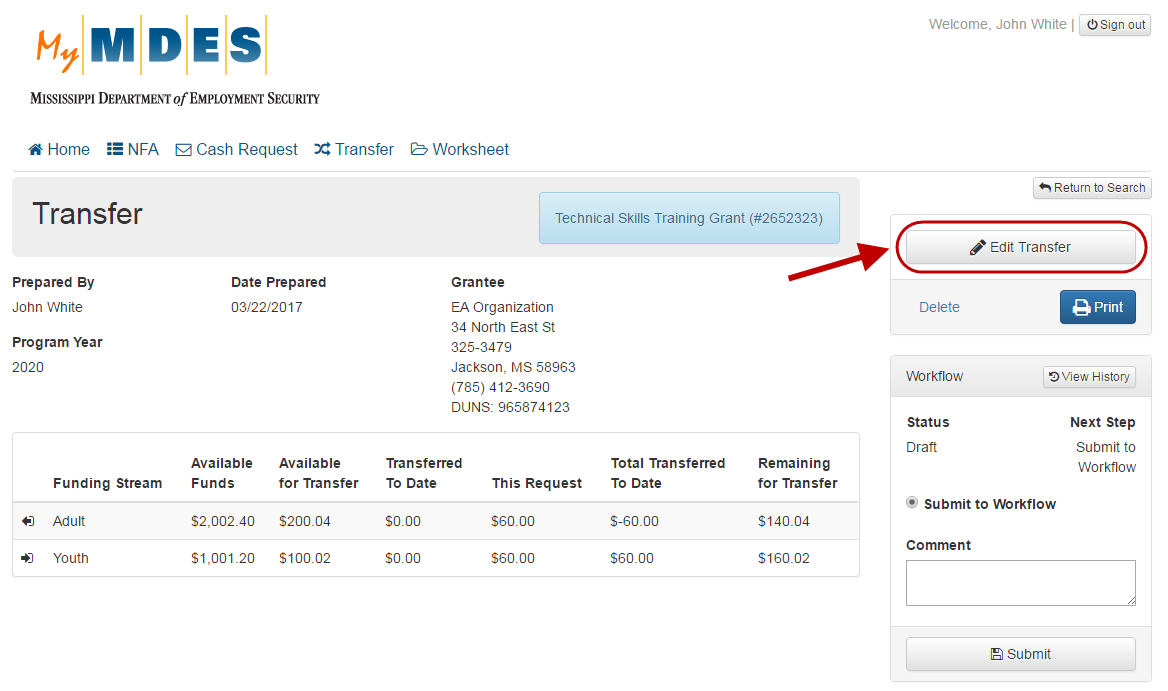
1. Click the folder icon and select the required document from your local directory.
2. Click the upload icon to attach the selected file.

Editing a Transfer

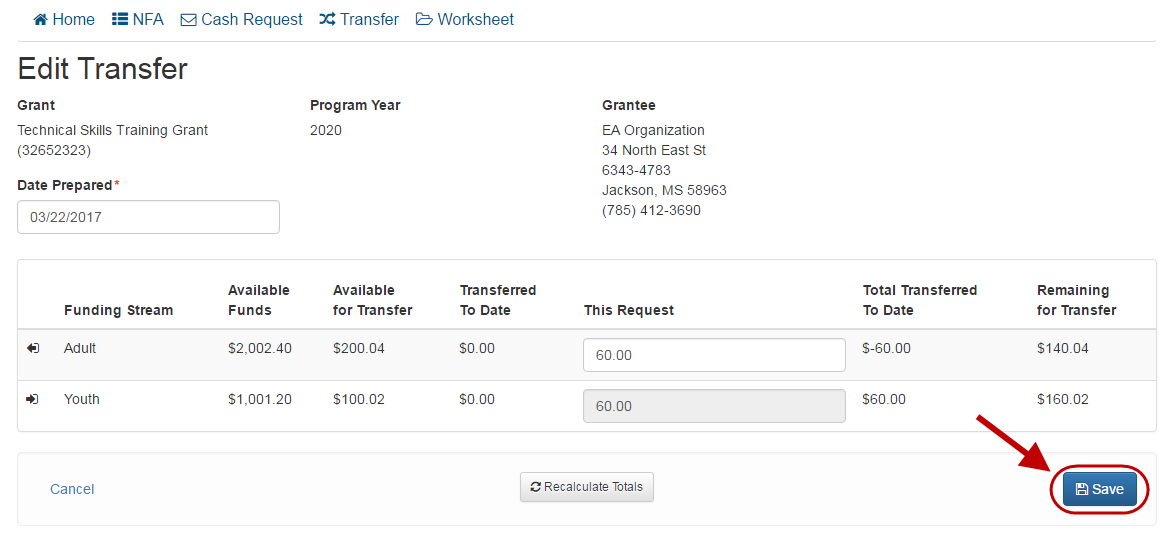
Grantee Staff members, Grantee Managers, Grantee Directors, and Grantee Executives can edit transfers that have a status of ‘Draft’.

Information related to a transfer can be modified from the associated Transfer View screen. For details on functions available for transfers, refer to the [Viewing a Transfer](#view_transfer) section.

**Step 1: Click the Edit Transfer button on the Transfer View screen.**



**Step 2: Edit information as necessary and click Save.**



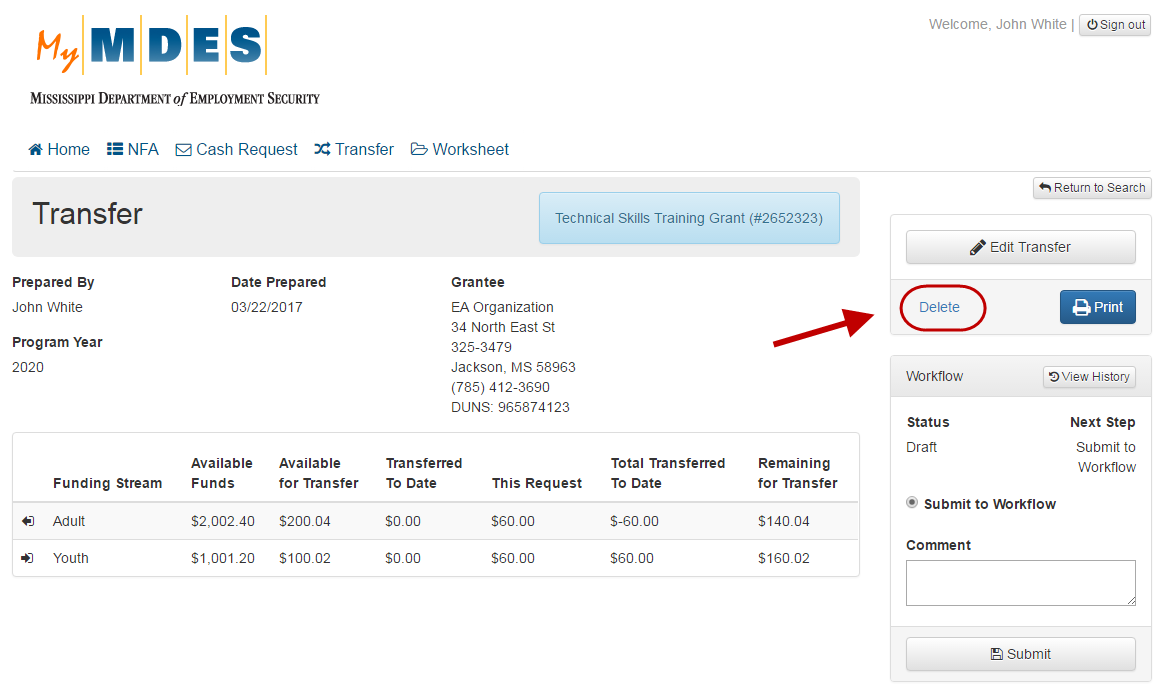
**NOTE:** Use the **Recalculate Totals** button to recalculate the remaining amount according to the entered request value.

Deleting a Transfer

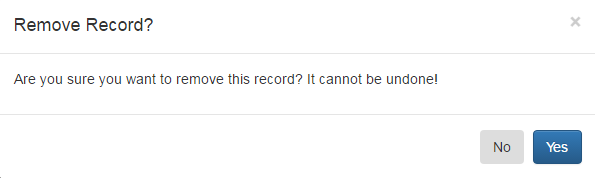
Grantee Staff members, Grantee Managers, Grantee Directors, and Grantee Executives can delete transfers that have a status of ‘Draft’.

Information related to a transfer can be removed from the associated Transfer View screen. For details on functions available for transfers, refer to the [Viewing a Transfer](#view_transfer) section.

**Step 1: Click the Delete link on the Transfer View screen.**



**Step 2: Click Yes to confirm the removal.**

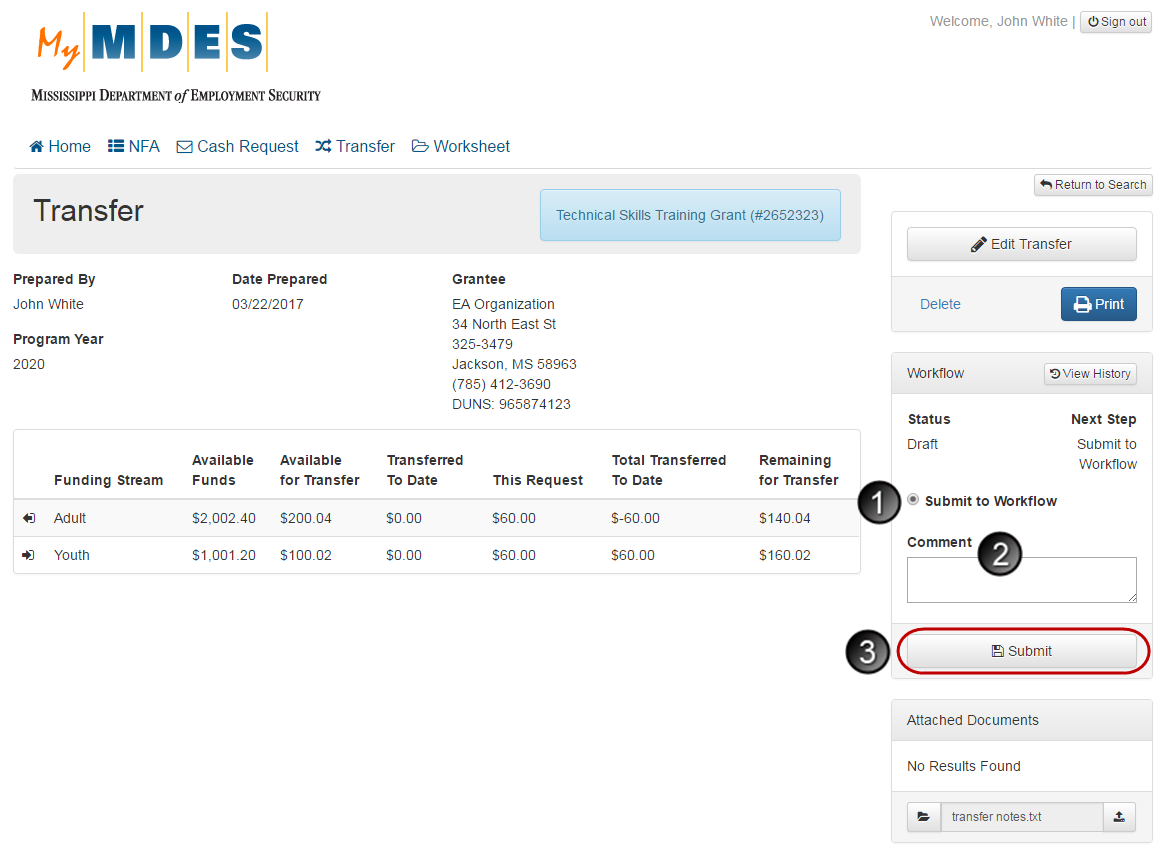


Submitting a Transfer to Workflow

Grantee Staff members, Grantee Managers, Grantee Directors and Grantee Executives can submit transfers to Workflow.

In order to initiate the process of approving a transfer, it must be submitted to Workflow from the associated Transfer View screen. For details on other actions available for transfers, refer to the [Viewing a Transfer](#view_transfer) section.

**Submit a Transfer to Workflow**



To submit a transfer to Workflow:

1. Select **Submit to Workflow** in the **Workflow** section.
2. Enter a comment in the **Comment** field.
3. Click the **Submit** button.

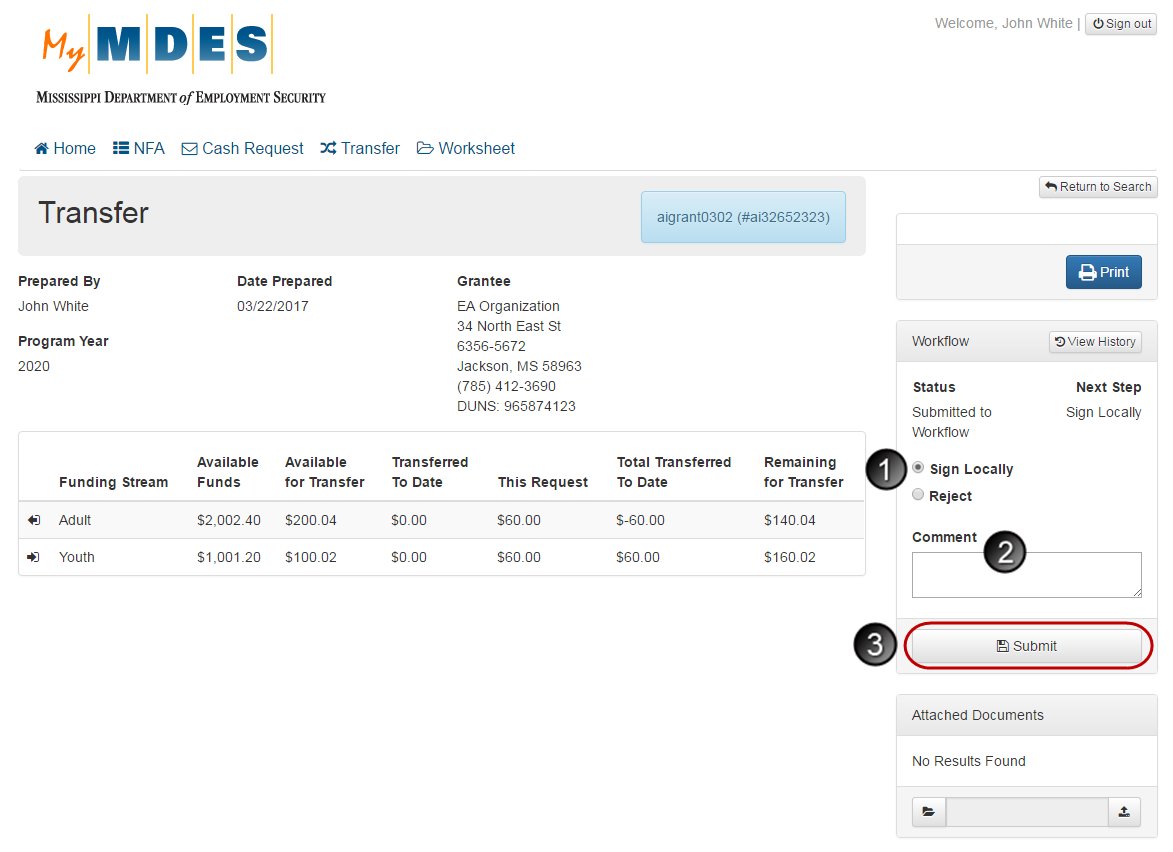
**NOTE:** Clicking **Submit** will change the status from ‘Draft to ‘Submitted to Workflow’.

Signing a Transfer

Grantee Managers, Grantee Directors, Grantee Executives and Board Chairmen can locally sign transfers that have a status of ‘Submitted to Workflow’.

Transfers can be signed from the associated Transfer View screen. For details on other actions available for transfers, refer to the [Viewing a Transfer](#view_transfer) section.

**Sign a Transfer**



To sign a Transfer:

1. Select **Sign Locally** in the **Workflow** section.
2. Enter a comment in the **Comment** field.
3. Click the **Submit** button.

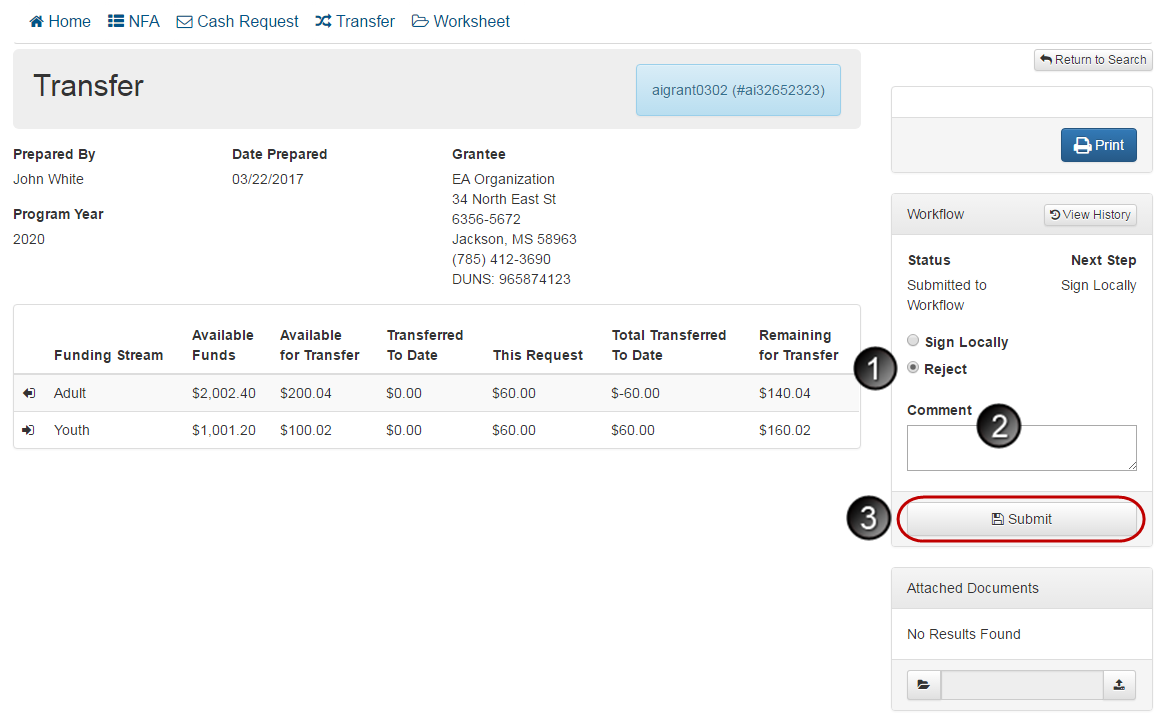
**NOTE**: Clicking **Submit** will change the status to ‘Locally Signed’.

Once the transfer has been locally signed, further status changes (state review, approval and sign off) are available only to State Office users.

Rejecting Status Changes

If necessary, a status change, which has been submitted, can be rejected.

**NOTE:** After a transfer has been locally signed, the status cannot be rejected.



To reject a status change:

1. Select **Reject** in the **Workflow** section.
2. Enter a comment in the **Comment** field.
3. Click the **Submit** button.

**NOTE**: Clicking **Submit** will change the status to ‘Draft’.

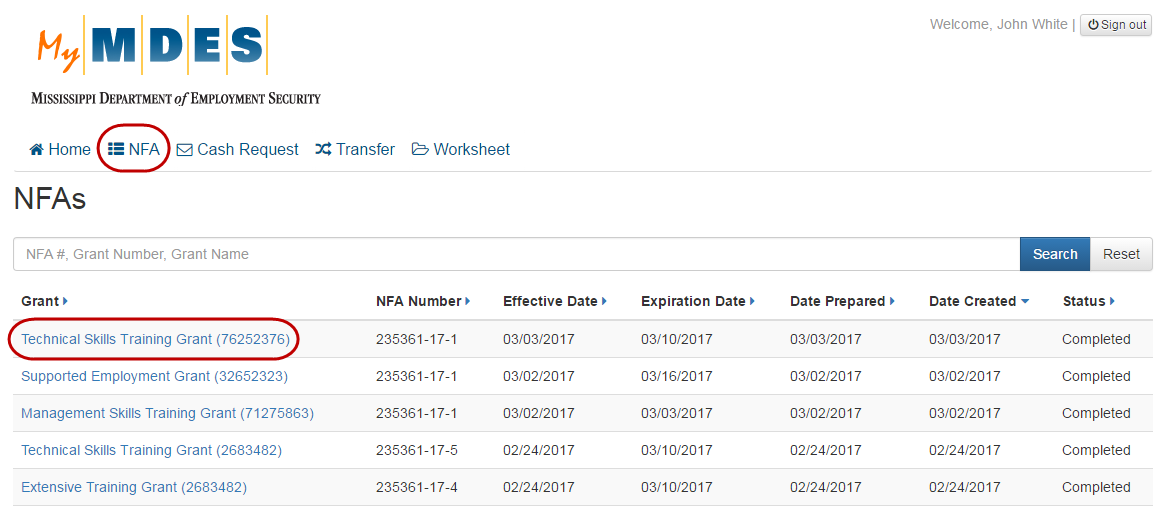
Worksheet

Creating a Worksheet

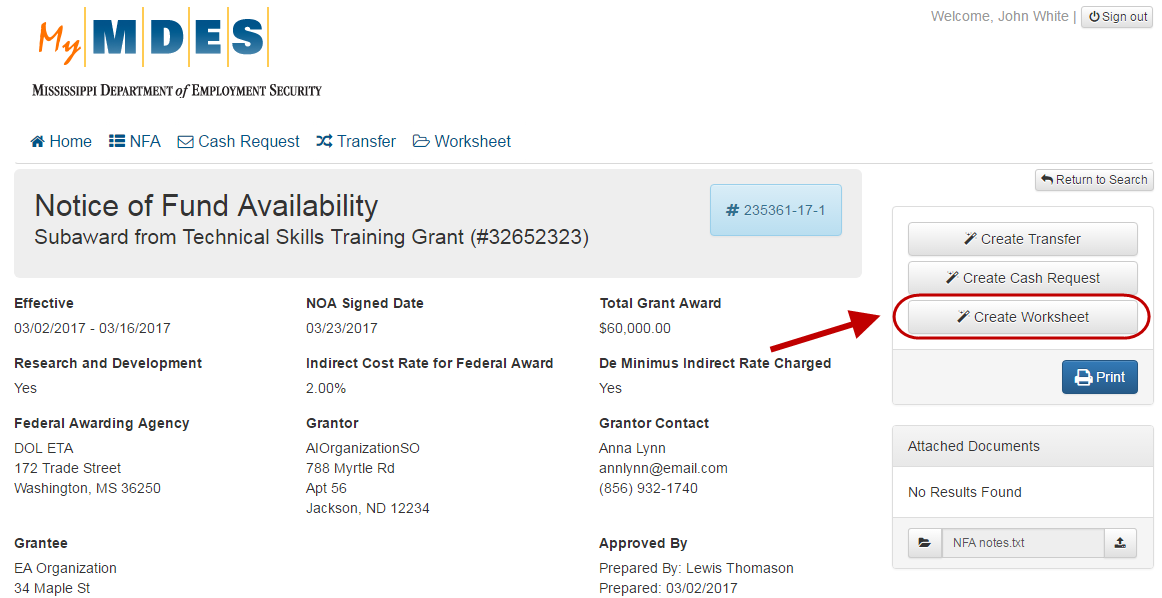
GrantTrak allows Grantee Staff members, Grantee Managers, Grantee Directors and Grantee Executives create worksheets.

Worksheets are created from the Notice of Fund Availability View screen. For details on other actions available for an NFA, refer to the [Viewing a Notice of Fund Availability](#view_NFA) section.

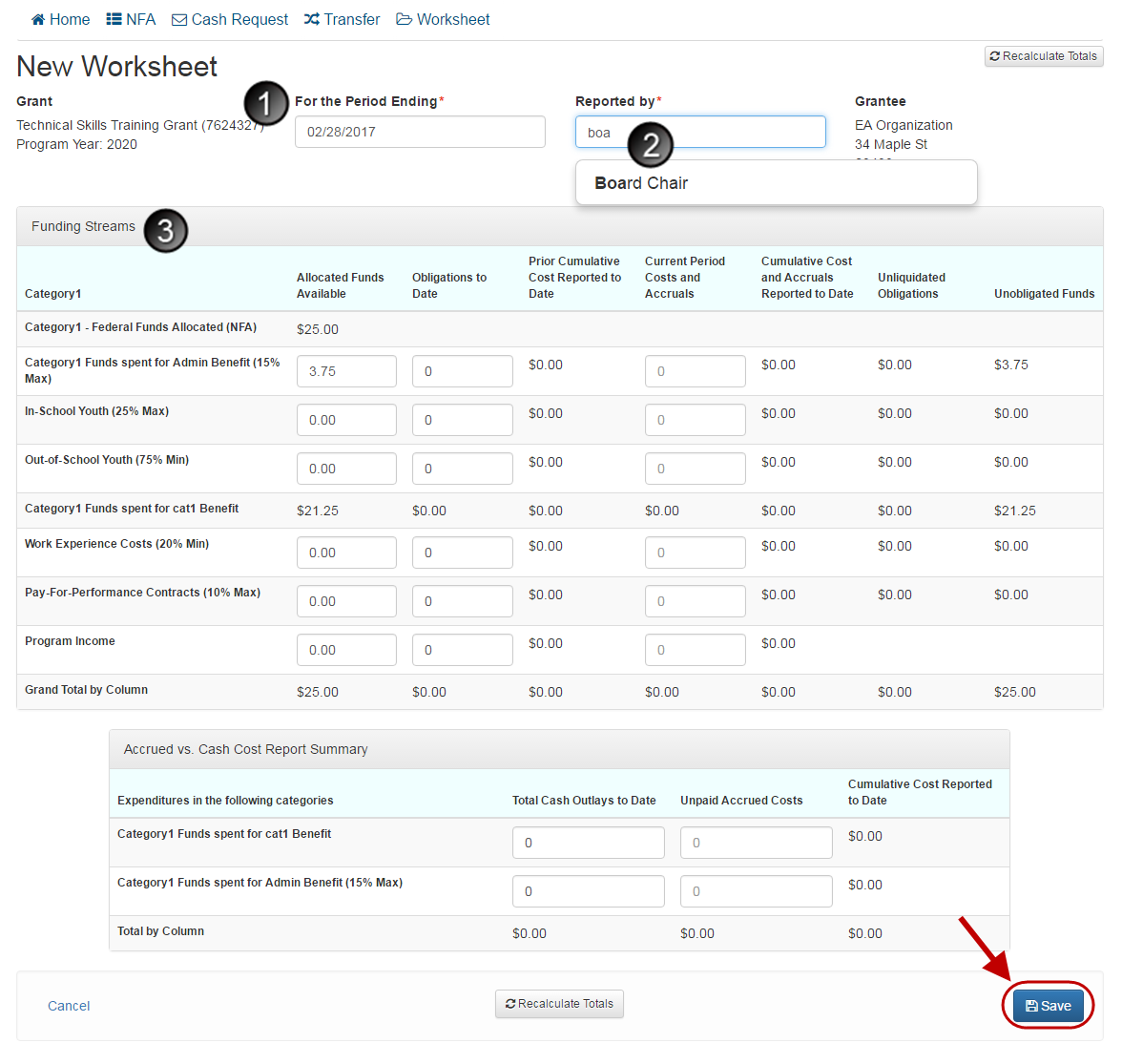
**Step 1: Click NFA and select the required NFA, from which you want to create a worksheet.**



**Step 2: On the Notice of Fund Availability View screen, click Create Worksheet.**



**Step 3: Complete the fields on the New Worksheet screen and click Save.**

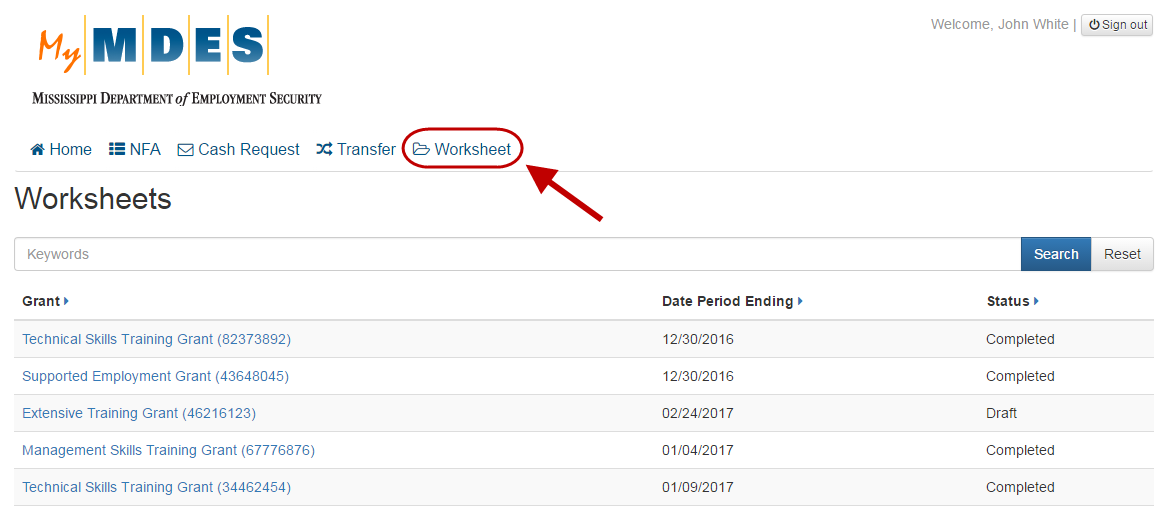


1. Select the appropriate date in the **For the Period Ending** field.
2. Enter at least 3 first characters of the username that requested the worksheet in the **Reported by** field and select the necessary option in the dropdown list.
3. If funding streams and allocations were provided, enter values in the corresponding fields as necessary.

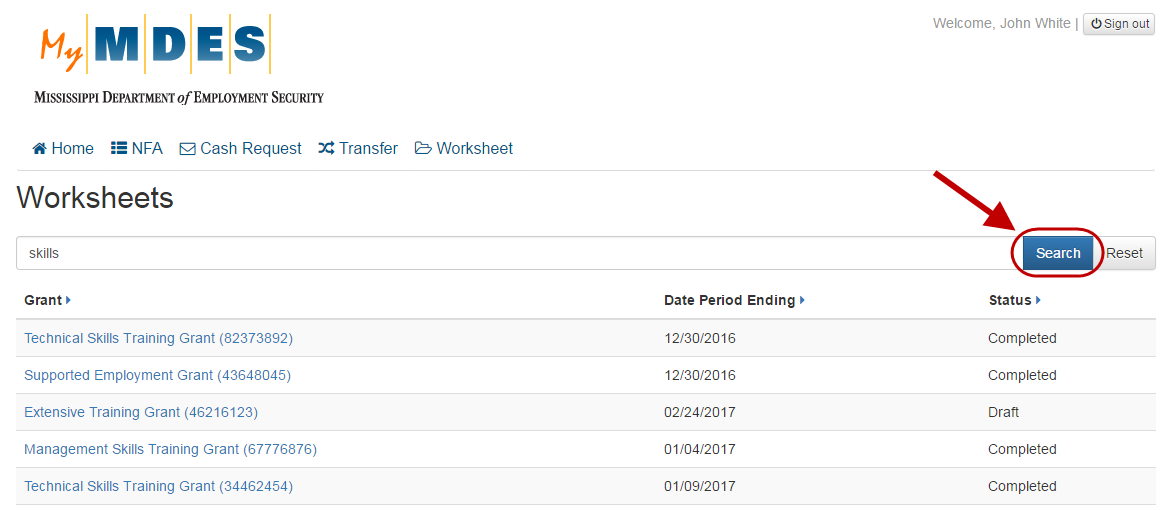
Searching for a Worksheet

Grantee Staff members, Grantee Managers, Grantee Directors, and Grantee Executives can search for worksheets.

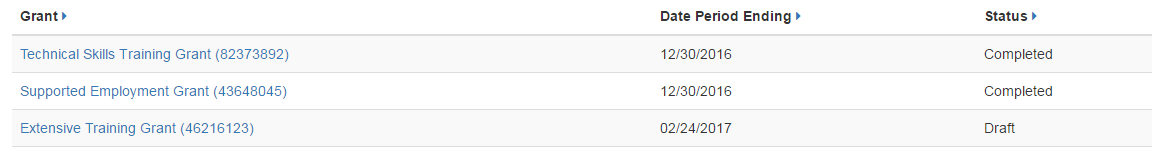
**Step 1: Click Worksheet in the top menu.**



**Step 2: Search for a worksheet by type a keyword and clicking Search.**



**Search Results Screen**



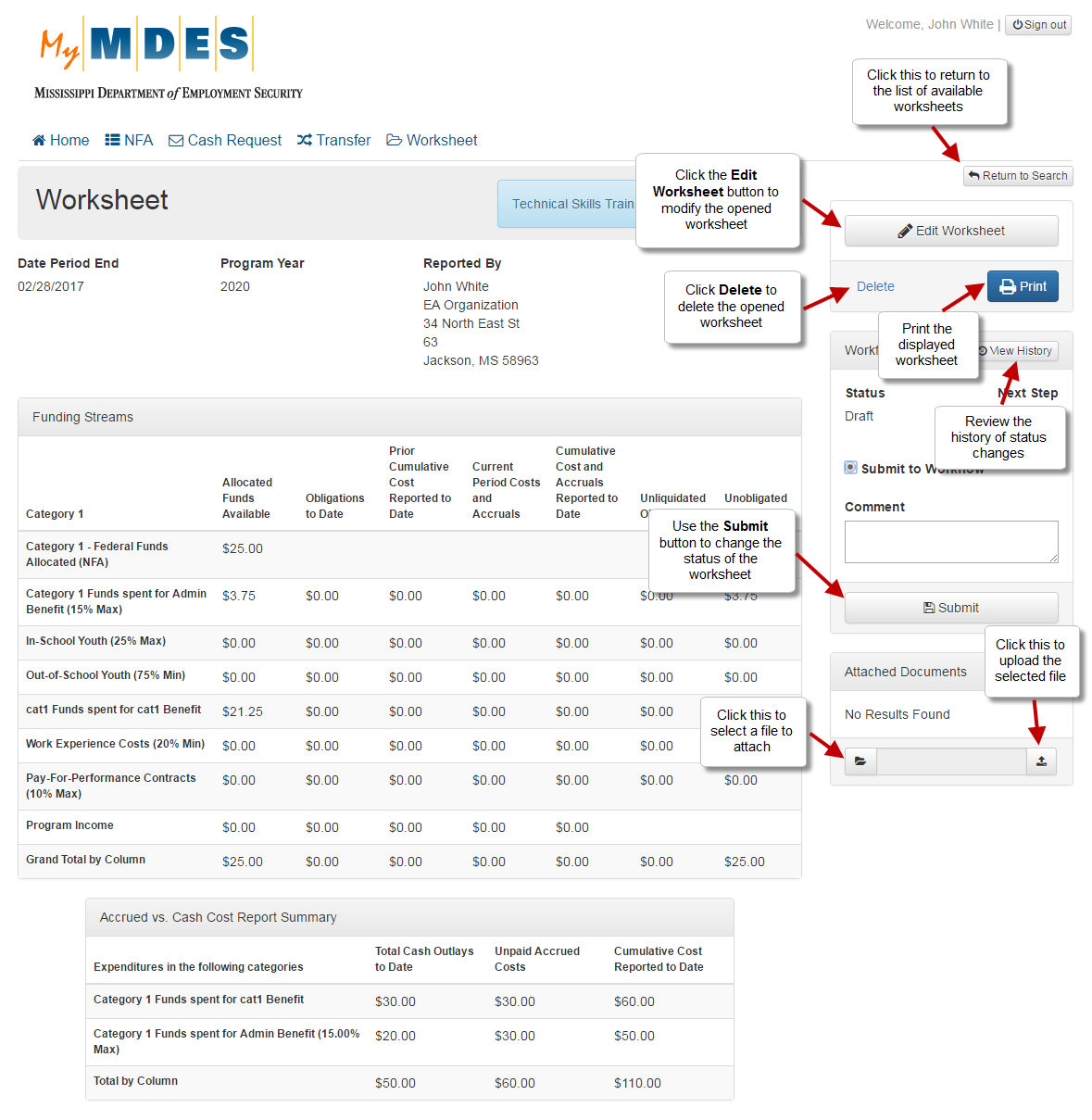
Clicking any grant name in the search results will open the corresponding Worksheet View screen. For more details, refer to the [Viewing a Worksheet](#view_worksheet) section.

Viewing a Worksheet

Grantee Staff members, Grantee Managers, Grantee Directors, and Grantee Executives can view worksheets.

To open a Worksheet View screen with associated details, click the grant name in the search results list. For details on how to search for a worksheet, refer to the [Searching for a Worksheet](#search_worksheet) section.

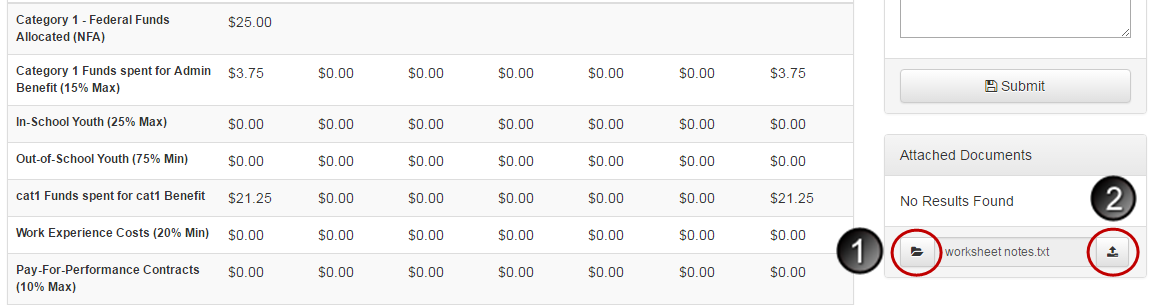
**Worksheet View Screen** (the number of available options on the screen may differ depending on your role in the system)



**NOTE:** The number of available actions on the screen depends on the status of the worksheet.

**Attach Documents to a Worksheet**

On a Worksheet View screen, you can attach documents to the displayed worksheet. To attach a document:



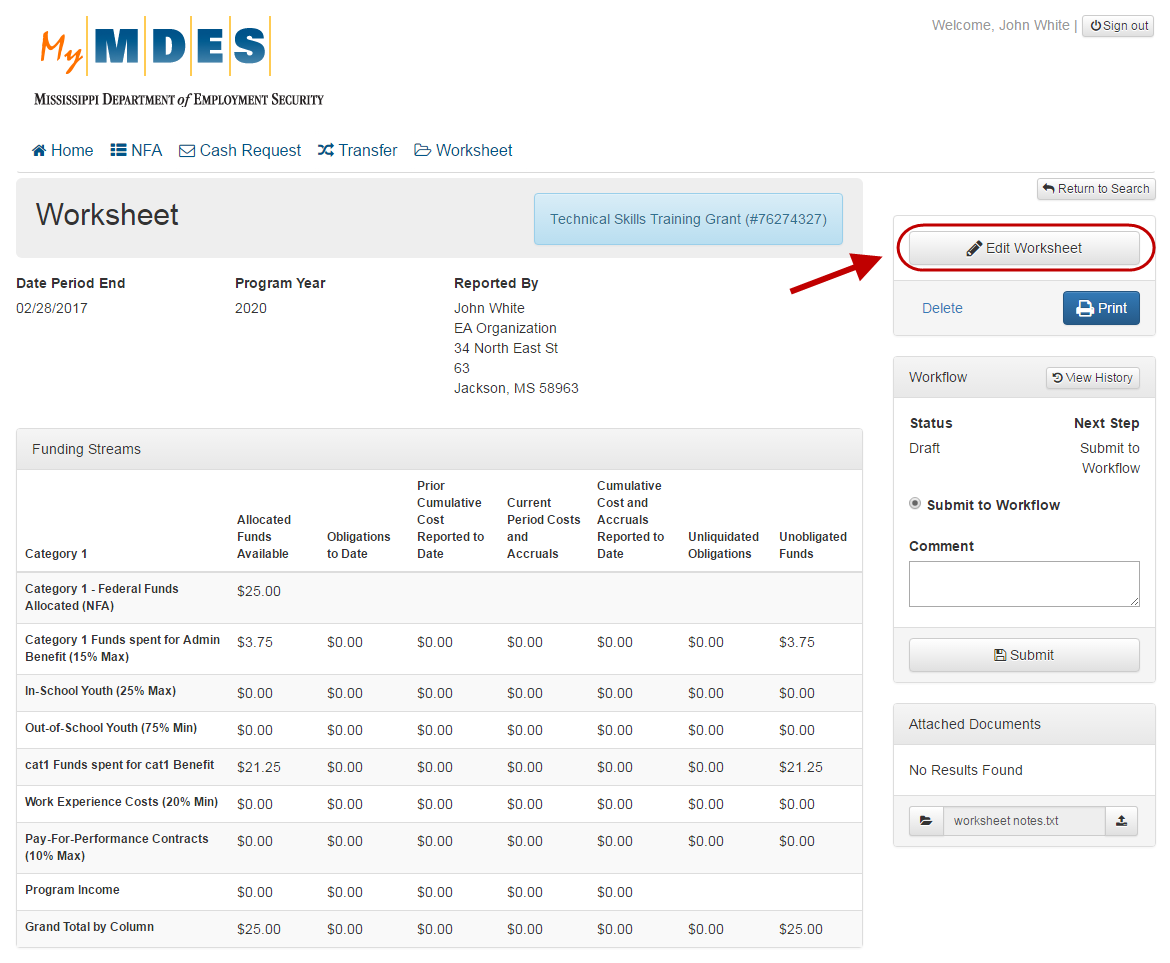
1. Click the folder icon and select the required document from your local directory.
2. Click the upload icon to attach the selected file.

Editing a Worksheet

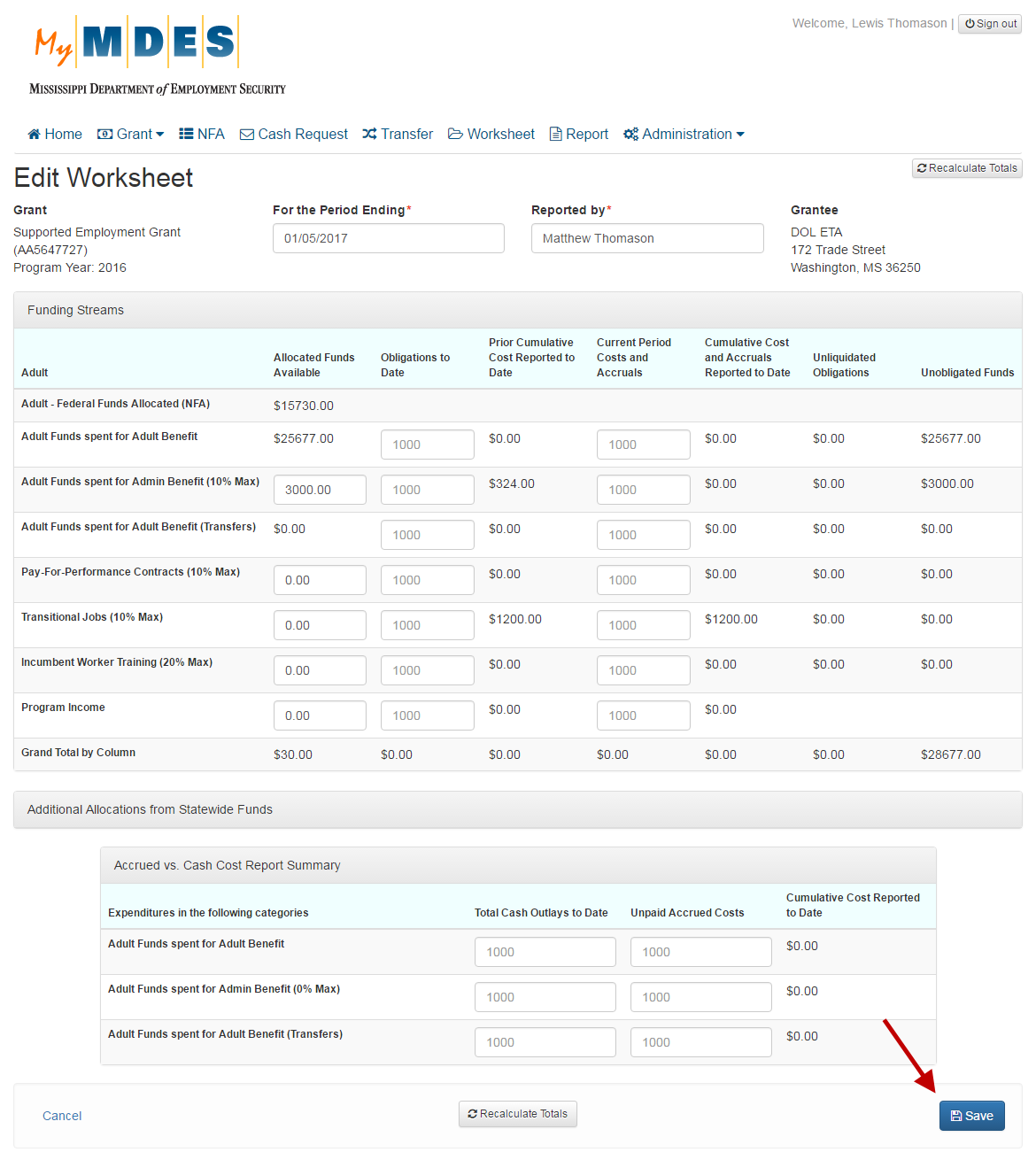
Grantee Staff members, Grantee Managers, Grantee Directors and Grantee Executives can edit worksheets that have a status of ‘Draft’.

Information related to a worksheet can be modified from the associated Worksheet View screen. For details on actions available from a Worksheet View screen, refer to the [Viewing a Worksheet](#view_worksheet) section.

**Step 1: Click the Edit Worksheet button on the Worksheet View screen.**



**Step 2: Edit information as necessary and click Save.**

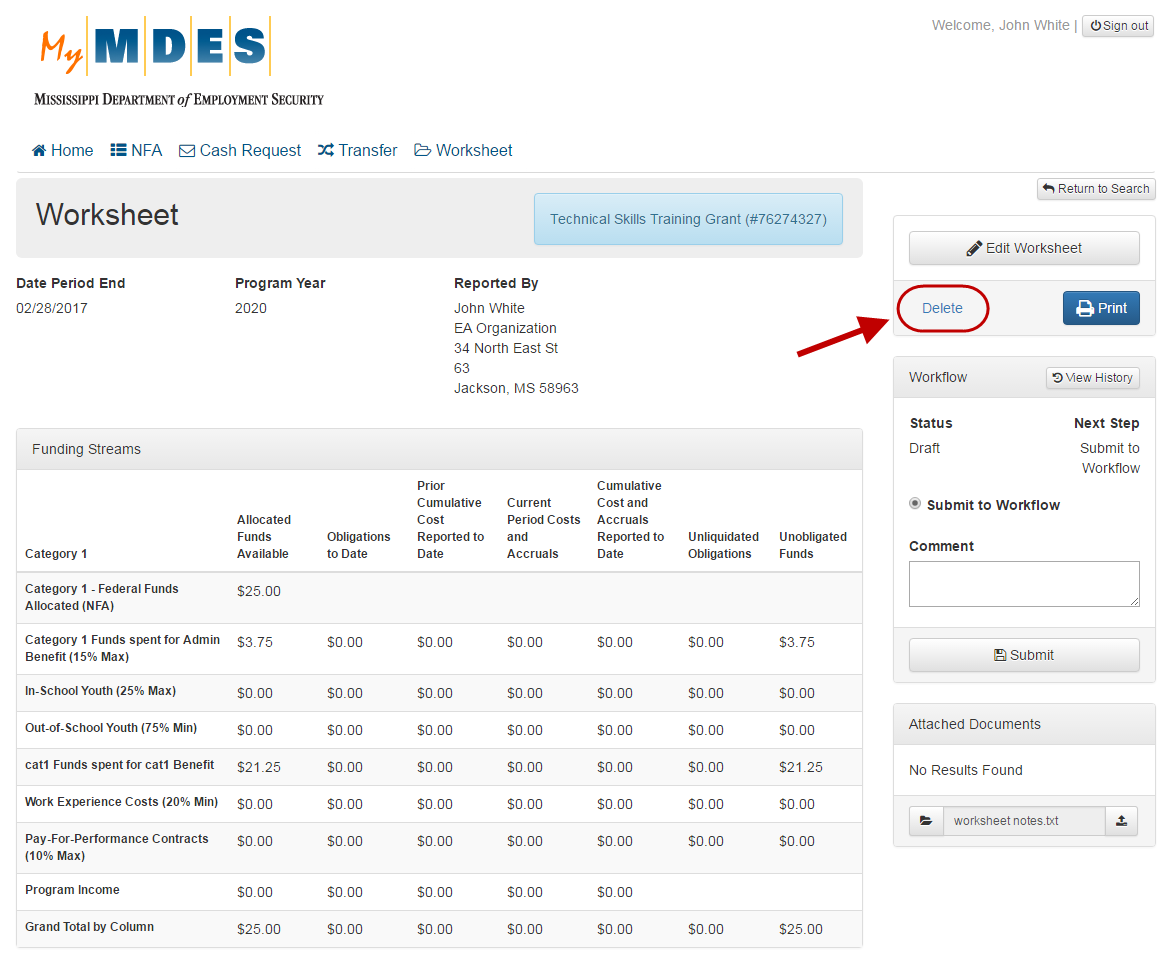


Deleting a Worksheet

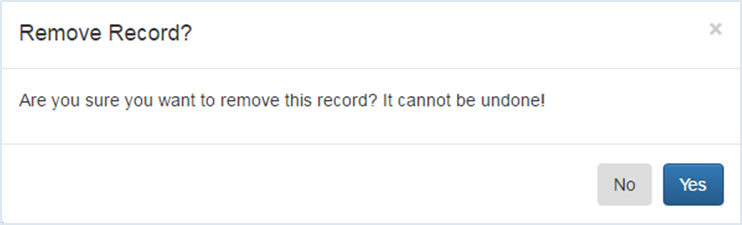
Grantee Staff members, Grantee Managers, Grantee Directors and Grantee Executives can delete worksheets that have a status of ‘Draft’.

Information related to a worksheet can be deleted from the associated Worksheet View screen. For details on actions available from a Worksheet View screen, refer to the [Viewing a Worksheet](#view_worksheet) section.

**Step 1: Click the Delete link on the Worksheet View screen.**



**Step 2: Click Yes to confirm the removal.**

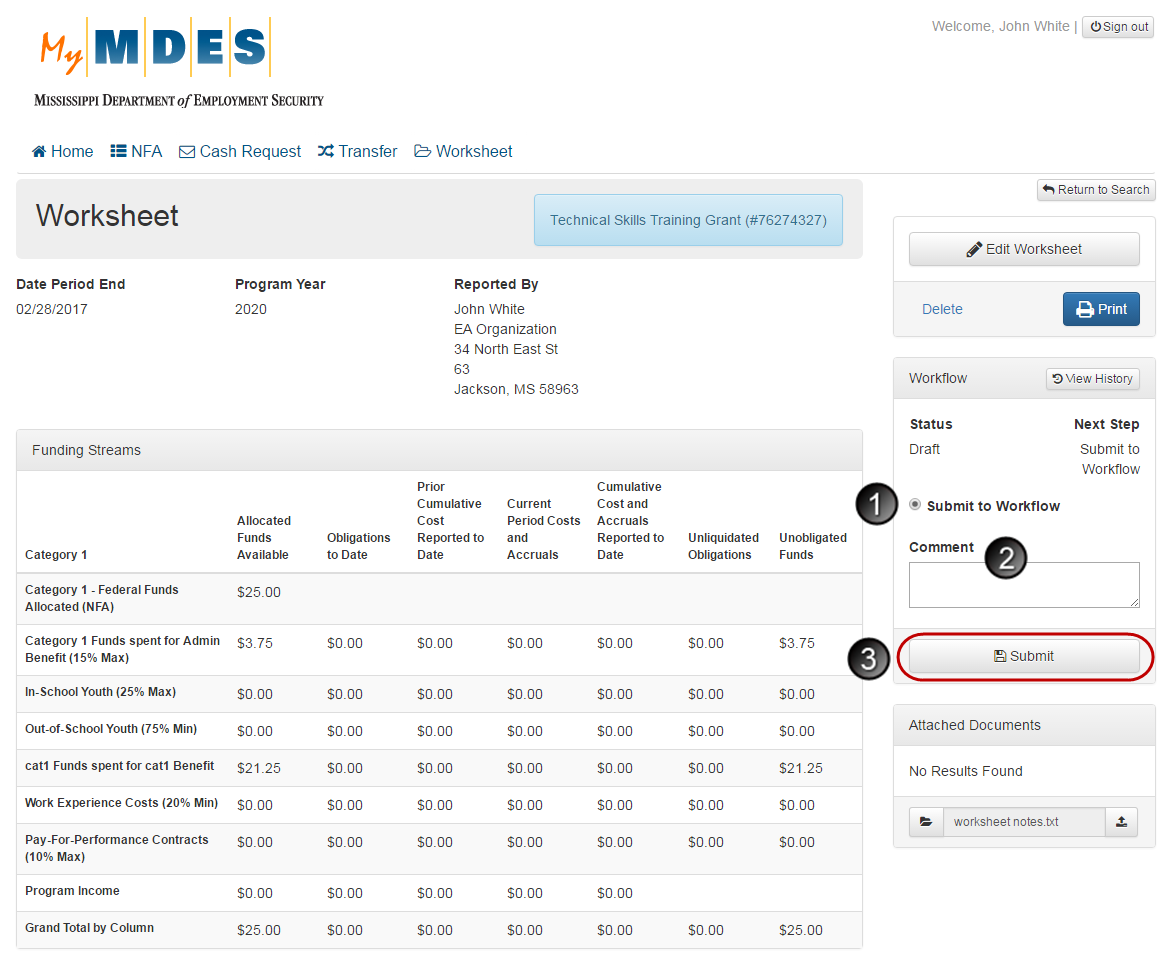


Submitting a Worksheet to Workflow

Grantee Managers, Grantee Directors and Grantee Executives can submit worksheets to Workflow.

In order to initiate the process of approving a worksheet, it must be submitted to Workflow from the associated Worksheet View screen. For details on actions available for worksheets, refer to the [Viewing a Worksheet](#view_worksheet) section.

**Submit a Worksheet to Workflow**



To submit a worksheet to Workflow:

1. Select **Submit to Workflow** in the **Workflow** section.
2. Enter a comment in the **Comment** field.
3. Click the **Submit** button.

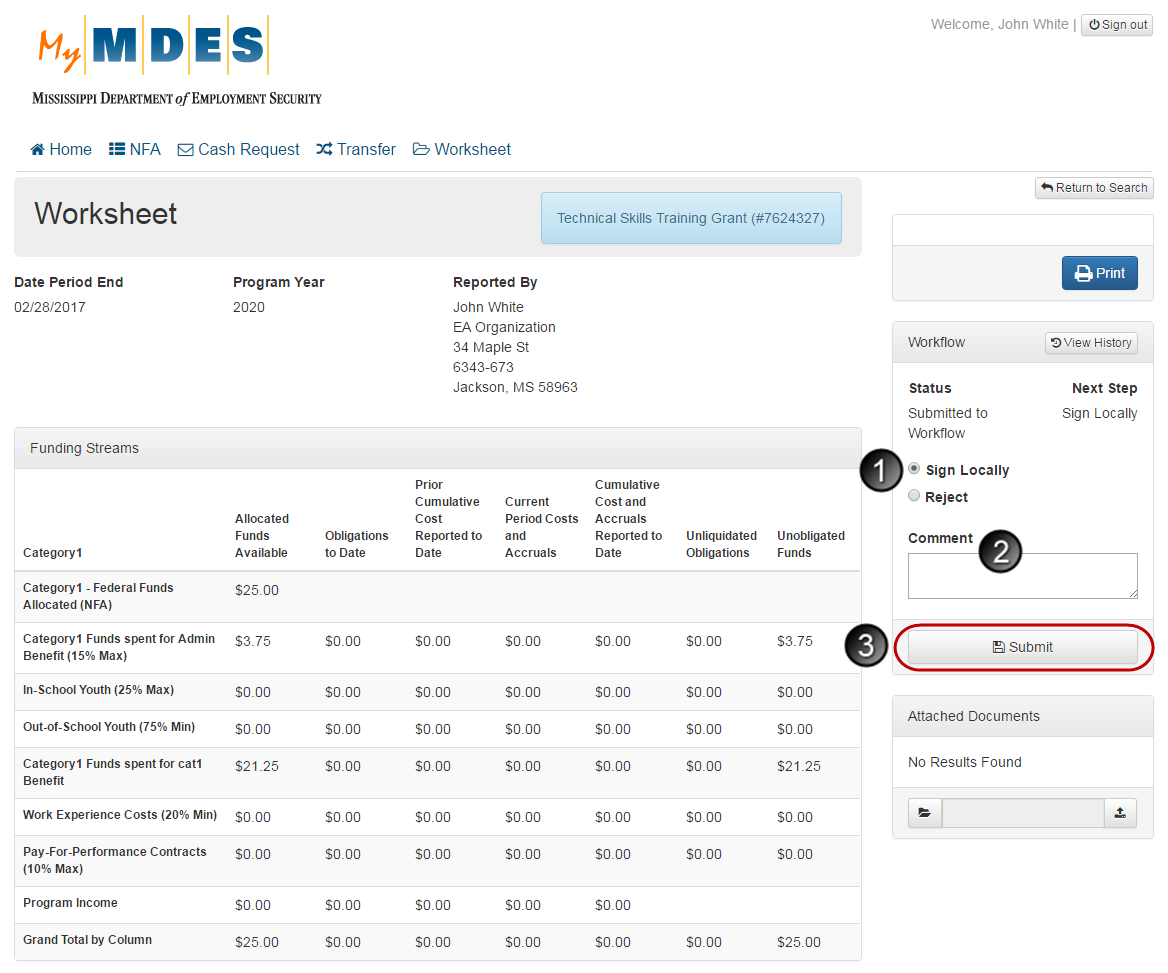
**NOTE**: Clicking **Submit** will change the status from ‘Draft to ‘Submitted to Workflow’.

Signing a Worksheet

Grantee Managers, Grantee Directors, Grantee Executives can locally sign worksheets that have a status of ‘Submitted to Workflow’.

Worksheets can be signed from the associated Worksheet View screen. For details on other actions available for worksheets, refer to the [Viewing a Worksheet](#view_worksheet) section.

**Sign a Worksheet**



To sign a worksheet:

1. Select **Sign Locally** in the **Workflow** section.
2. Enter a comment in the **Comment** field.
3. Click the **Submit** button.

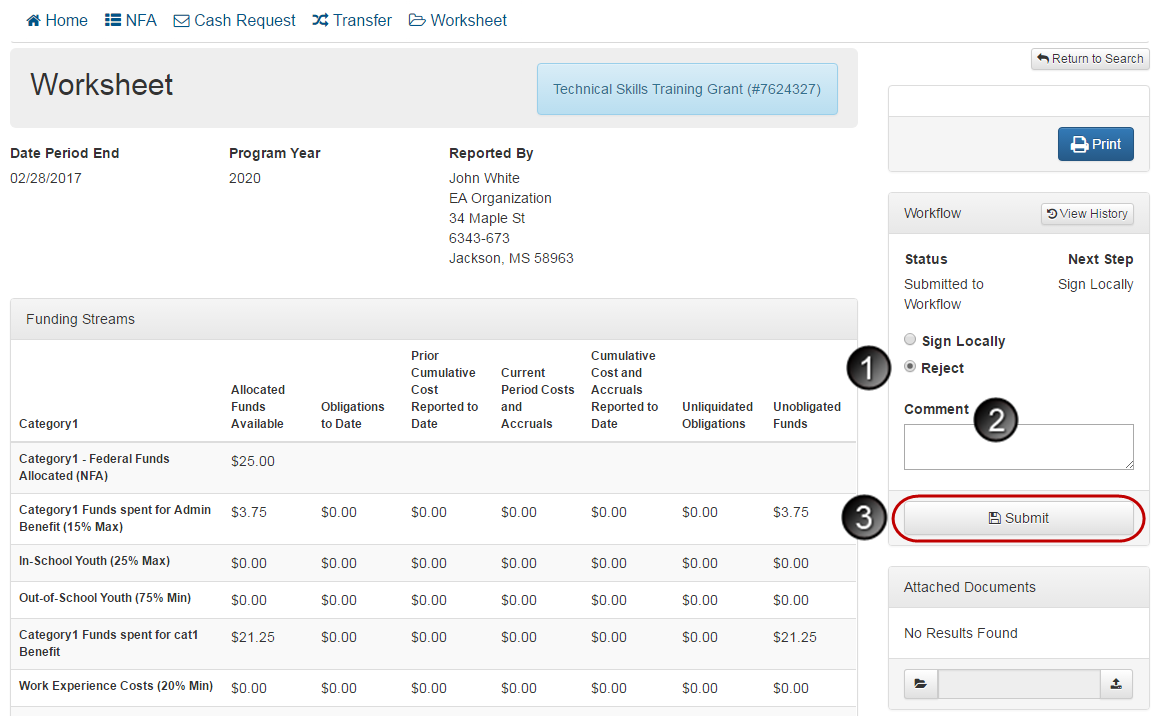
**NOTE**: Clicking **Submit** will change the status to ‘Locally Signed’ or ‘Completed’.

Once the worksheet has been locally signed, further status changes (state review, approval and sign off) are available only to State Office users.

Rejecting Status Changes

If necessary, a status change, which has been submitted, can be rejected.

**NOTE:** After a worksheet has been locally signed, the status cannot be rejected.



To reject a status change:

1. Select **Reject** in the **Workflow** section.
2. Enter a comment in the **Comment** field.
3. Click the **Submit** button.

**NOTE**: Clicking **Submit** will change the status to ‘Draft’.