Electronic Grants Administration & Management System - EGrAMS

Introduction
EGrAMS is an enterprise-wide web-based scalable, configurable, business rule driven and workflow based end-to-end electronic grants system. The system provides consistent and standard user interfaces to handle the process from grant application entry to closeout. It offers a streamlined solution to configure, find, apply and manage your grant application process quickly, efficiently and accurately. The system uses a comprehensive security framework for user authentication and authorization.

EGrAMS is quick to learn and easy to use even for users with no prior experience on a computerized grants system. The system provides user-friendly and intuitive web-based interfaces providing various ease-of-use features such as lookups, dropdowns and context sensitive help.

EGrAMS is a rule-based configurable application that comprises of several modules. Although there are several modules/sub modules that constitute the EGrAMS system, a user will see only application areas that are relevant to his/her role.

Application Overview
Most grant-giving organizations support several grant programs. Although the grants processes may be similar, there are several nuances at a grant program level. Each grant program has its own set of business rules, eligibility, narrative section, budget and match requirements, assurances, review guidelines, and reporting requirements. Grant-giving organizations can configure EGrAMS to support a wide range of grant programs. Configuration of each grant program in EGrAMS determines system behavior and controls.

The grant life cycle involves interaction from various roles from inception through closeout of a grant. Illustrated below is a high level process overview of the grant life cycle together with interactions by the various roles.

Roles in EGrAMS
The EGrAMS documentation makes references to various roles in the system and hence it is important to have a common understanding of the various roles and their significance in EGrAMS.

Roles are defined in the system by Security Administrators representing the grantor organization, during initial system configuration. Users are required to select from the available roles when they are creating their user profile in EGrAMS. A user role determines access to the various screens and functionalities in the system. In addition to the user role, a user will also have responsibility or permission code at a grant program / application level. A user can have only one role in the system but can have multiple responsibilities or permission codes at a program / application level.

*Note that the Roles and Permissions listed here are the most commonly used ones. Roles and permissions*
Administrator

An Administrator is an individual responsible for various administrative functions within the EGrAMS system. There may be several classes of administrators depending on responsibilities assigned to grantor staff personnel, for example - Application Administrator, Security Administrator, Grant Designer.

Application Administrator: The primary responsibilities of an application administrator are to set up various parameters and master codes that are required by the system. In addition, the application administrator also defines the text displayed on various pages (such as welcome page, home page, etc), email text and maintains the state agency information in the EGrAMS system.

Security Administrator: The primary responsibilities of a security administrator are to set up the various roles, permission codes, password validation rules and security related settings in the EGrAMS system. In addition, the security administrator also defines role based access permissions to the screens and user administration (for example Activate user accounts, change user role or parent agency, etc).

Grant Designer: A grant designer is mainly responsible for configuring the grant application package as required for each grant program. The requirements of this role/task include meeting with the business/program users to gather the grant program requirements and transcribing the requirements into the EGrAMS system. This is a techno-functional role and an individual assigned to this role should have an adequate understanding of the technology and business. Configuration responsibilities include defining the required workflows, grant program business rules; various sections of the grant application (face sheet, narrative, budget, etc) review checklists, reporting requirements, statistical reports and grant agreement/contract templates.

Grantor

A Grantor may be defined as an individual, agency or organization from whom a grant is made or a trust is set up. The grantor is responsible for communicating to potential grantees, approval of grant applications, disbursing the grant and monitoring the progress. A grantor is also referred to as an Implementing Agency in the EGrAMS documentation. Depending on the size of the agency and the number/specialization of its staff, the grantor role may be further classified into program, finance and contracts. Each of the roles grantor or program, finance and contracts can have various permission or responsibility codes at the grant program level.

Listed below are some of the responsibility or permission codes that may be assigned to a grantor or program role.

Program Administrator – a person from the grantor agency who is responsible for administering one or more grant programs. The Program Administrator is primarily responsible for assigning state agency users to the program, approving allocations (for non-competitive grants), creating review teams, assigning applications for review, reviewing review status, review and approval of grant applications and progress reports. In addition, a grant administrator can perform all the duties specified for data entry. A program administrator may also be referred to as a Program Coordinator, Program Manager or Grant Monitor.

Program Approval Authority is an individual from the grantor organization, responsible for performing program approval activities for a grant program.

Finance Approval Authority is an individual from the grantor organization, responsible for performing financial approval and accounting activities for a grant program.

Contract Manager – a person from the grantor agency who is responsible for approval of grant applications, progress reports and monitoring the progress of the contract execution.

Accounting Staff is an individual or group from the grantor organization that performs various accounting tasks for grant programs.

Data Entry – a person from the grantor agency who is responsible for entering contents from paper grant applications into EGrAMS. It is possible in the early years of implementation all grantee agencies may not
submit their grant applications electronically. However, to ensure consistent evaluation and a central repository of grant applications, the paper grant applications will have to be entered in EGrAMS.

**Grantee**
A Grantee may be defined as an individual, agency or organization to which a grant is made. The grantee is responsible for identifying potential grants, filling out the grant application and submission of periodic progress reports.

Listed below are some of the responsibility or permission codes that may be assigned to a grantor role.

**Project Director** – is a person from the grantee agency who is responsible for performing administrative tasks within his or her agency (Local Administrator). The Project Director is responsible for registering his or her agency in EGrAMS, granting access to users to grant applications within the grantee agency, submitting grant applications and progress reports. In addition, a project director can perform all the tasks specified for a grant writer.

**Authorized Official** – is a person from the grantee agency who is authorized to certify and submit grant applications and progress reports.

**Grant Writer** - person from the grantee agency who is responsible for entering contents in the various grant application sections in EGrAMS.

**Designated Local Council**
A Designated Local Council may be defined as an individual, agency or organization to which a grant is made. The grantee is responsible for identifying potential grants, filling out the grant application and submission of periodic progress reports. A designated local council is similar to a grantee agency. However in addition, they also have the responsibility of reviewing grantee grant applications (for certain grant categories) before they are submitted to the grantor agency by the grantee.

Listed below are some of the responsibility or permission codes that can be assigned to a grantor role.

**Project Director** - is a person from the grantee agency who is responsible for performing administrative tasks within his or her agency. The Project Director is responsible for registering his or her agency in EGrAMS, granting access to users to grant applications within their grantee agency, submitting grant applications and progress reports. In addition, a project director can perform all the duties specified for a grant writer.

**Grant Writer** - person from the local council who is responsible for entering a grant application in EGrAMS.

**Reviewer** - person from the local council who is responsible for reviewing grantee grant applications (for certain grant categories) before they are submitted to the grantor agency by the grantee.

**Multipurpose Collaborative Board**
A Multipurpose Collaborative Board may be defined as an individual, agency or organization that is responsible for reviewing and endorsing grantee grant applications (for certain grant categories) before they can be submitted to the grantor agency by the grantee.

**Reviewer**
A reviewer is an individual who is responsible for conducting an independent review, scoring and making recommendations for a grant application. Reviewer can be members of the grantor, grantee, local council community or volunteers. Reviewers may be assigned multiple applications for review and the same grant application may also be submitted to multiple reviewers.

Certain programs may require pre-screening, panel reviews, and interviews with applicants prior to making a recommendation. EGrAMS supports many review types, including self-review, team review, panel review, and individual review. The stage at which a specific review occurs is based upon the workflow configuration. For panel reviews, the grantor organization decides the number of panels and identifies reviewers for each panel, as needed by the grant program.

Described below are some responsibilities and permission codes that can be assigned to a reviewer role for panel reviews.
- **Panel Chair** is an individual responsible for administering a review panel. This activity may be performed by the program staff, if required.
- **Panel Co-chair** is an individual responsible for administering a review panel if needed, along with Panel Chair.
- **Reviewer** is an individual or a group responsible for reviewing and writing a review report for the grant applications assigned to them.
- **Panel Member** is an individual or a group responsible for reviewing grant applications assigned to them and participating in the review panel discussions. Some panel members, such as **External Reviewers** and **Community Representatives**, may have limited access to reviewer functions; they may not be able to score applications.

**External Entity**

External entities are individuals from organizations who perform specific tasks on grant applications assigned to them. External entities do not need to register with EGrAMS or provide login credentials to perform their tasks in EGrAMS. Typical tasks for external entities include reviewing an application or providing reference letters, certification and filling out specific forms.

The grant applicants identify external entities and assign them read/write access to some or all sections of their applications. Applicants also provide names, titles, and contact details of external entities as needed.
Accessing the Application

EGrAMS is a web-based application and is accessible over internet / intranet using a standard W3C web-browser (such as Microsoft Internet Explorer, Mozilla Firefox). Before accessing the application you may need to verify whether your computer meets the necessary hardware and software requirements stated below. You may also need to adjust screen resolution of your computer monitor to be able to view the application pages completely. This section of the manual provides information about the minimum requirements to access the application and also explains how to launch the application.

Hardware and Software Requirements

<table>
<thead>
<tr>
<th>Workstation</th>
<th>Pentium processor 512 MHz or higher</th>
</tr>
</thead>
<tbody>
<tr>
<td>RAM Requirements</td>
<td>512 MB or higher</td>
</tr>
<tr>
<td>Operating System</td>
<td>Windows 98, 2000, XP, Vista, 7</td>
</tr>
<tr>
<td>Browser</td>
<td>EGrAMS supports the following web-browsers:</td>
</tr>
<tr>
<td></td>
<td>▪ Internet Explorer ver. 6.5 and above</td>
</tr>
<tr>
<td></td>
<td>▪ Mozilla Firefox ver. 2.0 and above</td>
</tr>
<tr>
<td></td>
<td>▪ Safari ver. 3.1.2 and above</td>
</tr>
<tr>
<td></td>
<td>Browser should have JavaScript enabled and Popup Blocker disabled.</td>
</tr>
<tr>
<td>Screen Resolution</td>
<td>1024 x 768 pixels is recommended; 800 x 600 pixels is acceptable</td>
</tr>
<tr>
<td>Other Requirements</td>
<td>Internet access, Printer, Adobe Acrobat Reader</td>
</tr>
</tbody>
</table>

Desktop Settings

EGrAMS interface is designed to best display on with screen resolution set at 1024x768 pixels. To check the display settings on your computer that is running on a Windows operating system:

1. Click **Start** at the left bottom of your screen.
2. Click **Control Panel** in the start menu.
3. If your control panel is in Category View, click **Appearance and Themes** and then in Pick a task section, click **Change the screen resolution**.
4. If your control panel is in Classic View, double-click the **Display** icon.
5. The **Display Properties** screen is displayed as shown below:
6. Click **Settings** tab.

7. Ensure that the screen resolution is set to 1024 by 768 pixels. If not, move the **Screen resolution** slide bar and adjust the resolution to 1024 by 768 pixels.

8. Click **Apply** and then **OK** buttons to save the changes.

**Launching the Application**

In order to check whether you have access to the EGrAMS application:

1. Start your web browser and open a new browser window.

2. Type in the URL given to you to access the EGrAMS application (For example, [https://state.mi.gov/egrams](https://state.mi.gov/egrams)) and navigate to the entered URL. If the application has been launched successfully, the EGrAMS application homepage is displayed.

3. If you cannot access the application, please check and fix the following:
   a. Your computer is connected to the internet.
   b. The URL entered is correct.

4. If you still cannot access the application, contact your system administrator.

If the application has been launched successfully, you should see the EGrAMS Home Page, similar to the following screen (customized for the specific implementation).
HTC’s Electronic Grants Administration and Management System (EGrAMS) is a web-based scalable, configurable, business rule driven and workflow based end-to-end electronic Grants system. EGrAMS provides consistent and standard user interfaces to handle the process from grant application entry to closeout. EGrAMS provides a secure and scalable solution that facilitates an efficient method of grant planning, publishing and solicitation, application entry, review, approval, contract, award and post-award monitoring.

To access the EGrAMS application, you should have an active user account. If you already have an EGrAMS account [click here](#) to log into the application.

If you have any problem accessing the application, please contact EGrAMS Help Desk at (248) 786-2500 or at [egramshelp@htcin.com](mailto:egramshelp@htcin.com). Please include your full name and complete telephone number (with area code) when you contact the Help Desk.
Understanding the EGrAMS User Interface

To be able to use EGrAMS effectively, it is essential to have an understanding of the application interface and know-how of the User Interface (UI) features available across the application pages. This section helps familiarize with the application UI, identify common UI elements and their usage.

Sections of an EGrAMS Page

When you access the application by typing the URL in a Web browser, you will see the EGrAMS Home page. It is important to understand the main sections of the application page. The following is a sample EGrAMS Home page marked with important sections:

The above screen can be divided into three main sections – Header, Body and Footer. An explanation of these sections has been provided in the following sections:

Screen Header section

All screens display consistent Header information which consists of EGrAMS logo and the grantor agency logos (left and right). The images to be displayed in the header are configurable by authorized end users (typically system administrators). The images are configured as referential links to the Agency and State web sites. Illustrated below is an example of an EGrAMS screen header section.
Screen Body section

The body section contains information specific to the respective screen. Many of the screen shots in this manual may not show the screen header and / or footer sections to ensure that the most significant content is displayed in a screen. Illustrated below is an example of an EGrAMS screen body section for the EGrAMS Home Page.

The screen body is divided into two panes. In the right hand pane is agency’s profile and contact information, a section about EGrAMS and support and help-desk contact information. The left hand pane contains links to all EGrAMS options that can be accessed without logging into the system and may be accessed by all users.

Information Bar

The Information bar (shown below) appears on top of every page.

The information bar displays the following:

- The name of the page you are currently viewing
- A link, to access help information for the current page
- A link, to access page level help document(s)
- The current date
- Timeout information (if a user is logged in). The system keeps a tab on inactive sessions. If there is no activity on application session for a specific time as set, you will be logged out of the session. The information bar shows how many more minutes you have before a timeout. Each time there is an activity, the time is reset. You may want to save your work if it gets close to 5 minutes. The system gives you a warning message as shown below, when only two more minutes are left for a timeout.
If you are typing text in a page or entering information in fields, it is not considered as an activity for timeout calculation. Actions like refreshing a page, clicking a button, etc. are considered as activities.

Click OK on the timeout message and perform any activity in the application. If you are in the middle of entering details in a form, click OK to save the form or click Cancel to exit.

If there is a delay in responding to the above message, you will be logged out of the application and may lose unsaved information. You will then need to login to the application once again.

**Menu Bar**

The application pages that appear after login show a menu bar on the top of the page. The menu bar displays the menu available to the logged in user for accessing various EGrAMS features.

For more information on the application menu, see Accessing the Application Menu topic later in this manual.

**Screen Footer section**

All screens support consistent Footer information. The footer section displays the logged in user name and parent agency. In addition, it can be configured to display several links; examples include link to the implementing agency's web sites and links to EGrAMS functions such as Home page and Contact information display page. Illustrated below is an example of an EGrAMS screen footer section.
Common Screen Controls
In order to use EGrAMS effectively, it is imperative to know the screen controls and notations used and how to perform common tasks that are applicable across multiple screens. This section describes some of the general features and controls used in EGrAMS.

Application Menu
The application menu provides you access to various screens in EGrAMS. The EGrAMS menu is configurable by the grantor organization and it is dynamically generated based upon a user role and responsibilities. Therefore, the menu displayed after login is different for different users. However, the menu available before login is same for all users.

Accessing the Menu before Login
The menu options available for a user before login are shown on the left of the page body. You can click each of these options to access the relevant pages.

Placing the mouse on each option displays a brief tool tip describing what the option does. Illustrated below is an example of the tool tip displayed by placing the mouse over ‘Grant Opportunity Notification’.

Accessing the Menu after Login
The EGrAMS menu, after login, is accessible from the Menu bar on the top of the page body and from the EGrAMS Menu link in the page footer.

EGrAMS supports the following three styles of menu for the interface available after login:

- Dynamic Style Menu
- Drop-down Style Menu
- List Style Menu

The menu that is accessible from the Menu bar is either in Dynamic or Drop-down style. The menu that is accessible through the EGrAMS Menu link is displayed in List style. Authorized users from implementing
agency / grantor organization can configure the menu to appear in Dynamic or Drop-down style for each user. Based upon the style implemented, after logging in to the application, you will find the application menu in one of these two styles. However, you can change the display style of the menu by updating the **Menu Style** field in your profile.

Illustrated below is an example of a **dynamic menu** under the Grantor module.

![Dynamic Menu Example](image)

To access the required screen, place the mouse over the menu and the system will display a list of sub menus available under each menu. Placing the mouse on the required sub menu will display the available screen options/functions available under the respective sub menu. Click on the desired screen option / function to navigate to the required screen.

Illustrated below is an example of a **dropdown menu**.

![Dropdown Menu Example](image)

In a dropdown menu style, the Menu bar is subdivided into three sections to denote the nesting levels within each module. To select the desired option, select the option at the first level by clicking on the down arrow and then clicking on the required option. As an example, let us select “Grantor” as the main module. On completion of the main module selection, select the required sub module or program from the next menu level. Illustrated below is the screen that is displayed on a click of the down arrow at the
second menu level. As an example, let us select “Master Data” as the sub module. Refer to the respective sections for details on each module functionality and user instructions.

Notation used to denote a screen is as follows:

**Grantor → Master Data → Agency List**

The above screen notation means that to access the Agency List screen, you need to select the ‘Grantor’ module at the first level, ‘Master Data’ sub module at the second level and ‘Agency List’ and the third level.

**[Grantee | Local Council] → Project Director → Assign Users**

The above notation denotes that the ‘Assign Users’ option is available under the Grantee or Local Council menu at the first level. Based on your role, you will select either Grantee or Local Council at the first menu level.

Illustrated below is an example of a List menu, accessible by clicking on the EGrAMS Menu link in the footer.
In the list menu shown above, the various menu links are categorized under two higher levels. In the example above, the Agency link is at menu level 3, under Grantor (level 1) and Master data (level 2). Clicking on the Agency link will launch and display the respective screen.

**Comments and Help**

The Comment Line at the bottom of applicable screens displays a help comment for the currently focused field to aid the user in entering appropriate data. Illustrated below is an example of a comment line for the email field on the Grant Opportunity Notification screen.
The cursor is on the Email field and the comment displayed relates to the field your cursor is on as shown below.

Comment Line: Enter your email address

Field Lookups
EGrAMS expects certain valid values for code fields. In order to aid the user with the valid choices, all applicable fields support Field Lookups.

To determine whether a field supports a Field Lookup feature, check for the icon next to the field. Field Lookups are provided to help a user select the appropriate data for the specified field. To launch a Field Lookup on a field, click the above icon and you will see the respective Field Lookup window as shown below. The example below displays a lookup for counties.
By default, the Lookup window displays all applicable data for the respective field. To narrow down the search, enter the required search criteria in part or full in the ‘Search Criteria’ section of the window (see below). The Field Lookup window comprises of four sections as described below:

**Search criteria**
This section is displayed in the upper part of the window and is used to enter any selection criteria. Illustrated below is the search section of the lookup window.

![Search Window](image)

A user may enter code or/and description as search criteria. You may prefix or suffix the criteria with ‘%’ to denote a wildcard.

For example if you wish to search all counties starting with ‘Al’, you can simply specify Al% in the Description field of the search criteria section.

**A Note on Wildcards**
A wildcard may be defined as a symbol that stands for one or more unspecified characters. Wildcards may be specified as a prefix or as a suffix. The wildcard symbol used in “Find” mode for a single unspecified character is “?” and for one or more unspecified characters is “%”.

**Action Buttons**
This section displays the action buttons or option supported by the lookup window. Illustrated here is the action buttons or options section of the lookup window.

![Action Buttons](image)

- **Lookup** – Click this option after entering your search criteria. If you select Lookup without entering any search criteria, all relevant data for the field will be displayed in the results display grid.
- **Reset** - Use this option to clear out the search criteria entered.
**Close** - Use this option to cancel the search and return to the main screen.

**Navigation Buttons**

This section displays the total number of records (record count) found for the search. In addition, it also allows the user to navigate through the result set. Illustrated here is the Navigation buttons section of the lookup window.

![Record Count: 83](image)

The lookup window displays 50 records per page. If the returned result set contains more than one page, the system displays the total number of pages and also tells you the page you are currently on. Click on the appropriate navigation control to perform the desired action. Listed below is a description of the action performed by the navigation controls.

<table>
<thead>
<tr>
<th>Click</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>Go to the next page</td>
</tr>
<tr>
<td>🔄</td>
<td>Go to the last page</td>
</tr>
<tr>
<td>🔽</td>
<td>Go to the previous page</td>
</tr>
<tr>
<td>🔽</td>
<td>Go to the first page</td>
</tr>
</tbody>
</table>

**Results Display**

This section displays results of the search in multiples of 50 rows per page. Use the navigation buttons to navigate through the pages and use the vertical scroll bar to navigate within each page. Illustrated here is the Results Display section of the lookup window.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>Alcona</td>
</tr>
<tr>
<td>003</td>
<td>Alger</td>
</tr>
<tr>
<td>005</td>
<td>Allegan</td>
</tr>
<tr>
<td>007</td>
<td>Alpena</td>
</tr>
<tr>
<td>009</td>
<td>Antrim</td>
</tr>
<tr>
<td>011</td>
<td>Arenac</td>
</tr>
<tr>
<td>013</td>
<td>Baraga</td>
</tr>
<tr>
<td>015</td>
<td>Barry</td>
</tr>
<tr>
<td>017</td>
<td>Bay</td>
</tr>
<tr>
<td>019</td>
<td>Benzie</td>
</tr>
<tr>
<td>021</td>
<td>Berrien</td>
</tr>
<tr>
<td>023</td>
<td>Branch</td>
</tr>
<tr>
<td>025</td>
<td>Calhoun</td>
</tr>
</tbody>
</table>

To select the required row,

1. Move the cursor to the respective row
2. Click on the **Select** icon (✓) in the left most column of the row (as shown in red)

To cancel the search and return to the main screen, simply click on the **Close** option.

**Sort Options**

Some of the multiple record data entry screens support dynamic sorting of records in the grid. Individual screen documentation may identify the screens that support this feature. Sorting on a field can be performed by clicking the respective field heading. The sorting works as an Ascending / Descending toggle. If the displayed list is displayed in the ascending order and you click the heading again, the list will be displayed in descending order.

**Multiple-Select Lookups**

The field lookups functionality described in the previous section allows selecting a single record from the lookup window. EGrAMS also supports multiple-select lookups, wherein multiple records can be selected from the lookup window. An example has been shown below:

![Enter Search Parameters and click Find](image)

In the above example, you can select multiple values by clicking on the corresponding checkboxes. After selecting the appropriate values, click OK to close the lookup window, and populate the selection on the main window, as shown below:
The selected values in the lookup window are populated as displayed in the highlighted section.

**Calendar Lookups**

Applicable date fields support Calendar Lookups. To determine whether a date field supports a Calendar Lookup feature, check for the icon next to the field. To launch a Calendar Lookup on a field, click the above icon and you will see the Calendar Lookup window as shown.

By default, the calendar lookup displays the current month and year with current date selected. Clicking on the <<, <, >, and >> controls updates the display to the previous year, previous month, next month and next year respectively. Select the required Month, Year and Date. Clicking on a particular date in the calendar returns the selected date to the corresponding date field in the main screen.

Clicking on the icon closes the calendar and returns the control to the main screen. The following table explains the activities you can do using the calendar features:

<table>
<thead>
<tr>
<th>What you can do</th>
<th>How you can do it</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>What you can do</td>
<td>How you can do it</td>
</tr>
<tr>
<td>-----------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Select the previous year</td>
<td>Click the left double-arrow button ‹ to view the previous year’s calendar. You can also click and hold on this button to view the list of years as shown below. You can then drag the mouse to the year to select.</td>
</tr>
<tr>
<td>Select the previous month</td>
<td>Click the left arrow button ◀ to view the previous month’s calendar. You can also click and hold on this button to view the list of months, as shown in the sample screen below. You can then drag the mouse to select a month.</td>
</tr>
<tr>
<td>Select the next month</td>
<td>Click the right arrow button ▶ to view the next month’s calendar. You can also click and hold this button to view a list of months. You can then click on the required month.</td>
</tr>
<tr>
<td>Select the next year</td>
<td>Click the right double-arrow button ▶ to view the next year’s calendar. You can also click and hold on this button to view the list of years. Then drag the mouse and click the required year.</td>
</tr>
<tr>
<td>Select today’s date</td>
<td>Click the Today button Today to select the current date.</td>
</tr>
<tr>
<td>Change the order of days displayed in the calendar</td>
<td>Click the day, for example Mon, if you want the calendar to display weeks beginning Monday. The calendar display is refreshed to show</td>
</tr>
<tr>
<td>What you can do</td>
<td>How you can do it</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>dates falling on a Monday in the first column, as shown below:</td>
<td><img src="calendar.png" alt="Calendar Window" /></td>
</tr>
<tr>
<td>Selecting a date</td>
<td>Click on the date, for example, 16. The Calendar window closes and the selected date is entered in the field from which Calendar lookup is opened.</td>
</tr>
<tr>
<td>Quit calendar lookup</td>
<td>Click the close button, [x] to exit Calendar Lookup</td>
</tr>
<tr>
<td>Move the calendar window on the screen</td>
<td>Click at the bottom of the calendar window and hold the button while moving the mouse.</td>
</tr>
</tbody>
</table>

**Field DropDowns**
Field DropDowns are supported when the choice of values is limited. To determine whether a field supports a dropdown feature, check for the following icon next to the field.

To launch a dropdown, select the down arrow with your mouse. This will display the list of available values as displayed.

Move the mouse to the required value and click to select the required value.

**Error Reporting**
All screen validations are done on-line and any errors encountered are reported to the user in a dialog box. The error messages are explicit and the errors displayed are meaningful enough to give the user adequate insight for necessary action. Error dialogs are categorized into the following categories.

**Information Messages**
Information Messages are used to notify the user of an unexpected value or event in the system. The message usually tells the user of the problem and may recommend corrective actions, if applicable. An example of an information message is displayed here.
Click on the OK button in the information message window to acknowledge the message. On acknowledgement of the message, the application returns to the main screen.

**Confirmation Messages**

Confirmation Messages are to re-confirm a certain action from the user. A confirmation message is displayed as follows.

The dialog offers the following two choices to the user:
- Click on the OK button to confirm the respective action
- Click on the Cancel button to cancel the operation.

**Note on Data Entry Screens**

Most of the data entry screens will use one of the following modes.

1. Single Record – This mode is used when the information collected is not limited to a few fields. In a single record mode, the user performs any database operations (Add, Change, Delete or Review) on one record at a time. Illustrated below is an example of a single record entry screen.
2. **Multiple Record** – This mode of entry is used when the information collected is limited. This mode supports entry of information in multiple rows of similar information and is often referred to as a grid. In a multiple record mode, the user performs any database operations (Add, Change, Delete or Review) on multiple records at a time. Multiple record screens usually support two blocks.

   a. **Find Block** – This section is enabled in all modes other than Add (Change, Delete and Review) and is used to enter the user defined search criteria.
   
   b. **Data Entry Block** – This section is enabled in Add and Change modes and is used for entering the relevant field information.

Illustrated below is an example of a multiple record entry mode.
Data Entry Mode
All maintenance data entry screens support Add, Change, Delete and Review modes. Some screens may support additional modes based on their functionality. The functionality of the respective mode is described in the appropriate screen documentation. Listed below is the generic mode functionality for data entry to be supported by the various maintenance screens.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Add" /></td>
<td>This mode displays a blank screen and allows the user to enter a new record in the application. This is the default mode for all data entry screens. In a grid data entry screen, the application supports entry of multiple new records in one cycle.</td>
</tr>
<tr>
<td><img src="image" alt="Change" /></td>
<td>This mode allows the user to Edit an existing row in the database. On selection of this mode, the application displays a blank screen to enable the user to enter the search criteria to select the desired row to be changed. After display of the selected row, the user may change the required fields. In a grid data entry screen, the application supports changes to multiple records.</td>
</tr>
<tr>
<td><img src="image" alt="Delete" /></td>
<td>This mode allows the user to Delete an existing row in the database. On selection of this mode, the application displays a blank screen to enable the user to enter the search criteria to select the desired row to be deleted. After display of the selected row, the user may delete the displayed row. Prior to deletion, the application will ensure that the appropriate &quot;Delete criteria&quot; is met, if applicable. In a grid data entry screen, the application allows deleting multiple records by selecting (check marking) the desired records to be deleted.</td>
</tr>
</tbody>
</table>
### Mode Description

<table>
<thead>
<tr>
<th>Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Review" /></td>
<td>This mode allows the user to Review existing rows in the database. On selection of this mode, the application displays a blank screen to enable the user to enter the search criteria to select the desired rows to be reviewed. (Wild cards are supported). After display of the selected rows, the user may browse through the selected set.</td>
</tr>
</tbody>
</table>

### Screen Options
The Find, OK and Cancel options are used extensively throughout the application. Listed below is the generic option functionality to be supported by the various screens.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Find" /></td>
<td>This option is available in the Review, Change and Delete modes. After entering the selection criteria, you need to select the Find option to select the applicable data set.</td>
</tr>
<tr>
<td><img src="image" alt="OK" /></td>
<td>In Add mode of a data entry screen, this option saves a complete transaction to the database. In Change mode of a data entry screen, this option saves the updated transaction to the database. In Delete mode of a data entry screen, this option deletes the transaction from the database. In an error dialog, this option acts as an acknowledgement from the user.</td>
</tr>
<tr>
<td><img src="image" alt="Cancel" /></td>
<td>In Data Entry screen, if changes are made and not saved, the application will prompt the user with the following message “Save Changes to &lt;appropriate text&gt; ?”. The options provided are “OK” and “Cancel”. Based on the response to the options the following actions need to be taken. “OK” – Save record, Close screen and return to Calling Menu “Cancel” – Resume Editing In a Lookup Window, this option cancels the search, closes the corresponding window and returns to the calling screen with an appropriate Cancel indicator.</td>
</tr>
</tbody>
</table>