

User Management on Grants and Applications, Alerts, and Dashboard in WebGrants

The purpose of this guide is to demonstrate how your organization can set up users' profiles and associate them with grants to ensure timely and efficient management of grants.

These instructions will focus on three functions:

1. User Management – On Grants
2. User Management – On Applications
3. Alerts and the Dashboard System

1. User Management – On Grants

Within the WebGrants system, external organizations will need to actively manage staff assigned to grants. **Please note that only staff members associated with grants will be able to see active grants and engage in grants management processes** such as submitting claims (reimbursements), requesting time extensions and scope changes, and signing contracts.

The main contact for a grant is called “**Grantee Contact**” in the WebGrants system. DRPT staff are the only users that can change the “Grantee Contact”, so if this person needs to be changed, please reach out to your DRPT Program Manager.

External users associated with organization can add and remove “Additional Grantee Contacts” to grants that are in the “Underway” status. To do so, please follow the instructions below:

1.1 Begin at the WebGrants landing page at <https://grants.drpt.virginia.gov>. On the Login page, enter your User ID and Password, then click “Sign In”.

Login

Enter your user id and password

User ID

Password

SIGN IN

[Forgot User ID?](#) [Forgot Password?](#)

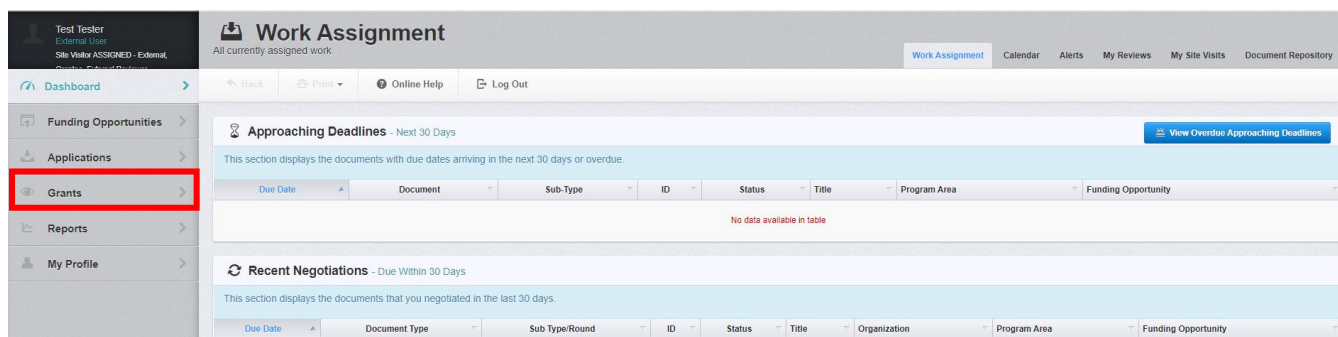
[Click here to Register](#)

Announcements

DRPT SYSTEM USE NOTIFICATION

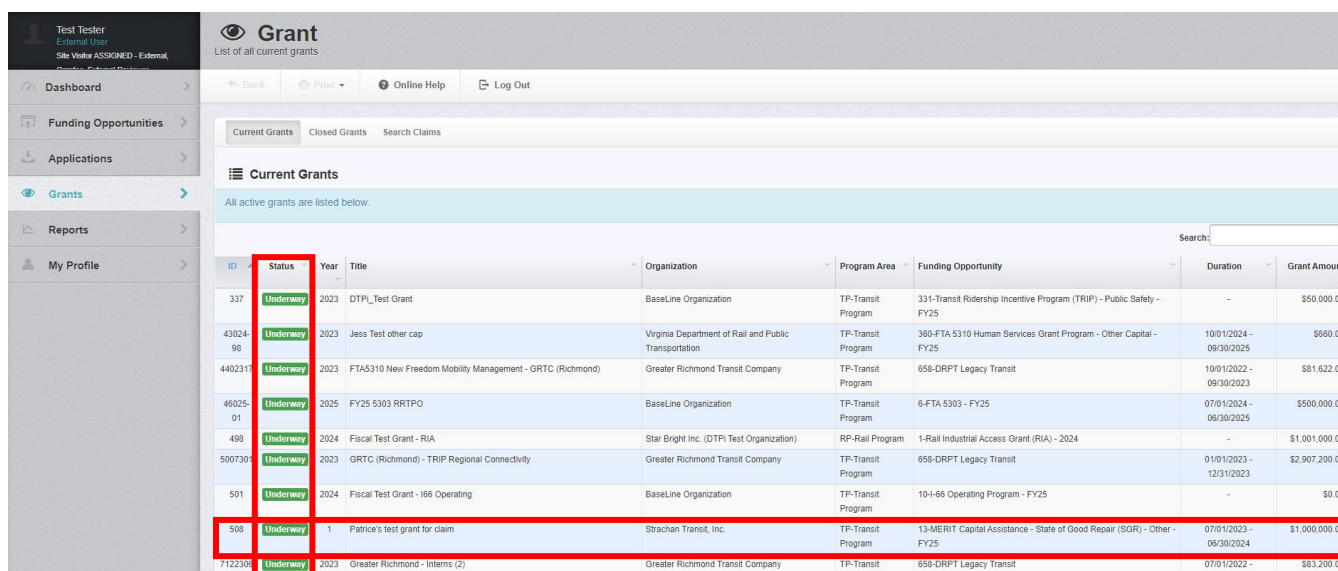
This system is the property of the Commonwealth of Virginia. Only persons authorized shall be allowed access to this system. Those permitted access shall use this system ONLY for purposes for which they have been authorized. ALL access and usage on this system may be monitored, recorded, and subject to audit. ANY unauthorized access, use, or abuse of this system or the information contained therein shall be reported to appropriate authorities for investigation and prosecution to the fullest extent of the law.

2. Once logged in, you'll see the WebGrants main menu. On the left-hand panel, click "Grants"



1.3 You will only be able to see grants that are in "Underway" status. Navigate to the Grant you would like to assign staff to, and click anywhere on the row

- This will bring you to the "Grant Components" module
- All grants management functions will be listed here



1.4 Click "General Information"

508 - Patrice's test grant for claim - 1

Status: **Underway**

Program Area: Transit Program

Funding Opportunity: 13-MERIT Capital Assistance - State of Good Repair (SGR) - Other - FY25

Organization: Strachan Transit, Inc.

Grantee Contact: Pat Strachan

Program Officer: Grant Sparks

Total Project Awarded Amount: \$1,000,000.00

Grant Components Preview Grant

The grant forms appear below.

| Component | Last Edited |
|----------------------------|-------------------------------------|
| General Information | Nov 10, 2023 1:34 PM - Grant Sparks |
| Status Reports | |
| Claims | |
| Contract Amendments | |
| Site Visits | |
| Contract | |
| Encumbrances | Oct 24, 2023 5:05 PM - Grant Sparks |
| Correspondence | |
| Budget | Sep 26, 2023 3:12 PM - |
| Project Information | |
| Assets to be Replaced | |

1.5 Click “Edit Additional Contacts”

Back Print Online Help Log Out

Grant List Genera Status Claims Contra Site V Contra Encumb Corres Budget Projec Assets Projec Federa Attach Closeo

The Grant general information data is listed below, this contains the high-level information about the Grant.

General Information Edit Additional Contacts

Grant Id: 508

Title: Patrice's test grant for claim

Status: Underway

Year: 1

Program Area: Transit Program

Organization: Strachan Transit, Inc.

Grantee Contact: Pat Strachan

Additional Grantee Contacts: Test Tester

Program Officer: Grant Sparks

Additional Internal Contacts:

Contract Dates: 09/01/2023 12/31/2023 07/01/2023 06/30/2024
Contract Sent Contract Received Contract Legal Contract Executed

Project Dates: 07/01/2023 06/30/2024
Start Date End Date

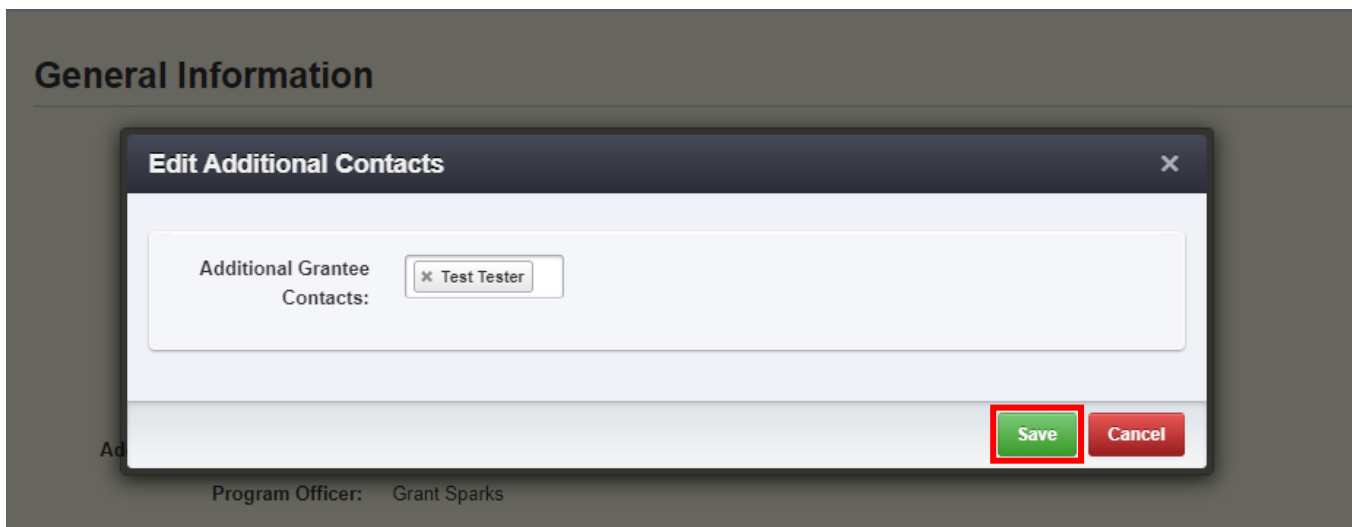
Vendor ID:

Comments: Test grant to submit a claim.

Last Edited By: Grant Sparks - Nov 10, 2023 1:34 PM

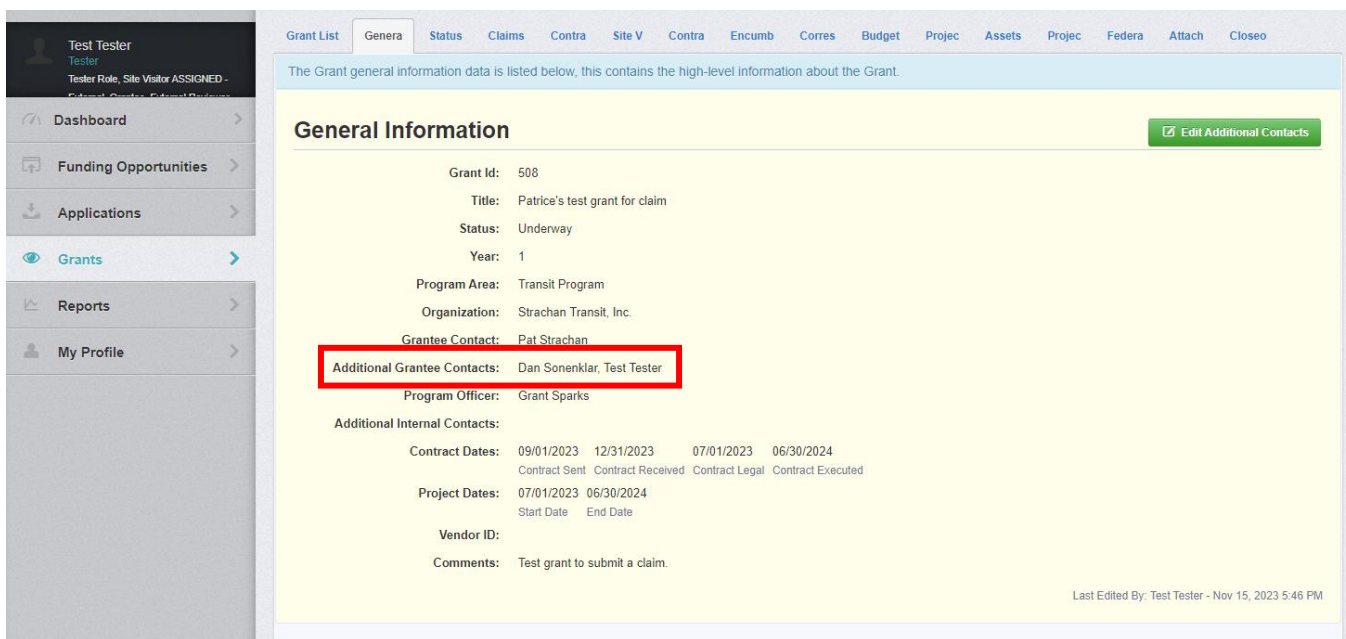
1.6 Click into the “Additional Grantee Contacts” field, and select any active users from your organization that you would like to associate with this grant

1.7 Click “Save”



1.8 The general information screen will now be updated to show all external organization staff associated with the grant

- All staff associated with a grant will receive alerts within the system and via email



1.9 Repeat these steps for all grants in the “Underway” status.

2. User Management – On Applications

Within WebGrants, external staff that are associated with a grant application will automatically be associated with the grant should it be awarded to the organization. To skip the step outlined above in “User Management – On Grants”, applicants can add all staff at the time of application. To do this, [please see the first seven steps on the WebGrants Instruction Manual “Applications for Funding”](#).

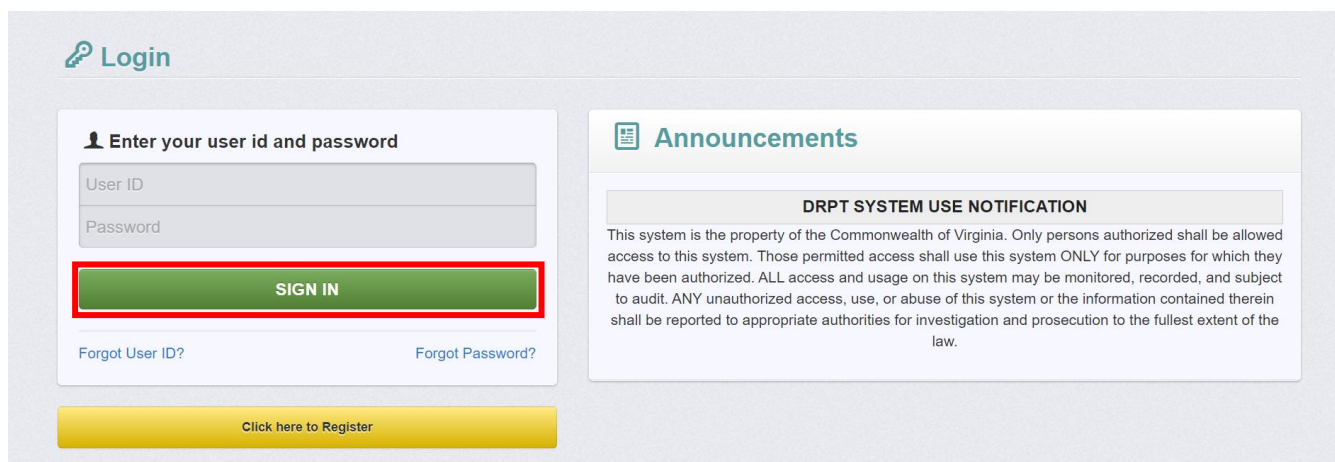
3. Alerts and the Dashboard System

External users are automatically enrolled in **Alerts** for the applications and grants they are associated with. This means that external users will receive email alerts regarding status changes for anything they are associated with, and they will be able to see these alerts within the Dashboard.

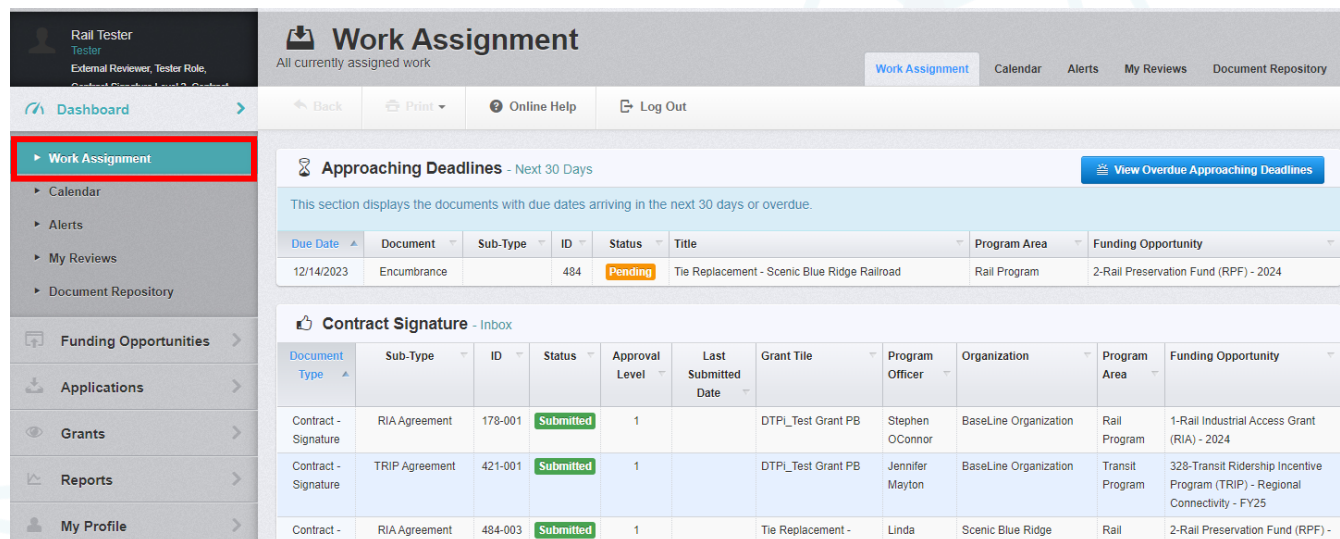
The dashboard build into WebGrants contains a wealth of information regarding the applications and grants that external users are associated with. Though there are many sub-components of the dashboard, these instructions will focus on two parts: **Work Assignments** and **Alerts**.

Please see the following instructions which explain how to navigate the dashboard.

3.1 Begin at the WebGrants landing page at <https://grants.drpt.virginia.gov>. On the Login page, enter your User ID and Password, then click “Sign In”.



- This will take you to the Dashboard – Work Assignment Screen
- Alternatively, if you are already in the system, please navigate to the Dashboard tab on the lefthand side of the screen, click it, then click “Work Assignment”



3.2 The **Approaching Deadlines** section will include any pending work items with deadlines within the next 30 days.

- This can include:
 - Application deadlines
 - Negotiation deadlines
 - Encumbrance deadlines
 - Status Report deadlines – these are mandatory reports for open grants (Note: DRPT may require status reports through WebGrants in the future, but these will not be configured on December 1, 2023)
 - Site Visit deadlines – these are mandatory reports for site visits associated with projects and/or organizations (Note: DRPT may require status reports through WebGrants in the future, but these will not be configured on December 1, 2023)
 - Review Deadlines – these are applications reviews assigned to user (Note: DRPT will not be assigning any reviews to external users)

3.3 Click anywhere on the row of the item in the Approaching Deadlines table to review the action needed

3.4 To view any overdue deadlines, click “View Overdue Approaching Deadlines”

The screenshot shows the 'Work Assignment' dashboard for a user named 'Rail Tester'. The main section is titled 'Approaching Deadlines - Next 30 Days' and contains a table with the following data:

| Due Date | Document | Sub-Type | ID | Status | Title | Program Area | Funding Opportunity |
|------------|-------------|----------|-----|---------|----------------------------------------------|--------------|---------------------------------------|
| 12/14/2023 | Encumbrance | | 484 | Pending | Tie Replacement - Scenic Blue Ridge Railroad | Rail Program | 2-Rail Preservation Fund (RPF) - 2024 |

Below this table is a 'Contract Signature - Inbox' section with a table of contract signatures:

| Document Type | Sub-Type | ID | Status | Approval Level | Last Submitted Date | Grant Title | Program Officer | Organization | Program Area | Funding Opportunity |
|----------------------|----------------|--------------|-----------|----------------|---------------------|----------------------------------------------|-----------------|------------------------------------|-----------------|-------------------------------------------------------------------------------|
| Contract - Signature | RIA Agreement | 178-001 | Submitted | 1 | | DTPL_Test Grant PB | Stephen OConnor | BaseLine Organization | Rail Program | 1-Rail Industrial Access Grant (RIA) - 2024 |
| Contract - Signature | TRIP Agreement | 421-001 | Submitted | 1 | | DTPL_Test Grant PB | Jennifer Mayton | BaseLine Organization | Transit Program | 328-Transit Ridership Incentive Program (TRIP) - Regional Connectivity - FY25 |
| Contract - Signature | RIA Agreement | 484-003 | Submitted | 1 | | Tie Replacement - Scenic Blue Ridge Railroad | Linda Balderson | Scenic Blue Ridge Railroad Company | Rail Program | 2-Rail Preservation Fund (RPF) - 2024 |
| Contract - Signature | RPF Agreement | 75524-26-001 | Approved | 1 | | Public Graded Crossing Safety Project | Linda Balderson | Shenandoah Valley RR | Rail Program | 2-Rail Preservation Fund (RPF) - 2024 |

3.5 The **Contract Signature** section includes contracts all contracts that need to be signed by the user logged in.

- Only certain external users that are able to sign contracts will ever see items show up in this section
- Click anywhere on the row of the item in the Contract Signature table to navigate to the contract that needs to be signed

Contract Signature - Inbox

| Document Type | Sub-Type | ID | Status | Approval Level | Last Submitted Date | Grant Title | Program Officer | Organization | Program Area | Funding Opportunity |
|----------------------|-------------------------------------------|--------------|-----------|----------------|---------------------|----------------------------------------------|-----------------|-------------------------------------------------------|-----------------|-------------------------------------------------------------------------------|
| Contract - Signature | RIA Agreement | 178-001 | Submitted | 1 | | DTPJ_Test Grant PB | Stephen OConnor | BaseLine Organization | Rail Program | 1-Rail Industrial Access Grant (RIA) - 2024 |
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| Contract - Signature | RPF Agreement | 75524-26-001 | Approved | 1 | | Public Graded Crossing Safety Project | Linda Balderson | Shenandoah Valley RR | Rail Program | 2-Rail Preservation Fund (RPF) - 2024 |
| Contract - Signature | TRIP Agreement | 46025-01-001 | Submitted | 1 | | FY25 5303 RRTPO | Grant Sparks | BaseLine Organization | Transit Program | 6-FTA 5303 - FY25 |
| Contract - Signature | MERIT Operating Assistance 5311 Agreement | 491-002 | Submitted | 1 | | Fiscal Test - Manual Grant 2 | Jolene Simon | Virginia Department of Rail and Public Transportation | Transit Program | 358-FTA 5310 Human Services Grant Program - Capital-Vehicles - FY25 |

Recent Negotiations - Due Within 30 Days

This section displays the documents that you negotiated in the last 30 days.

| Due Date | Document Type | Sub Type/Round | ID | Status | Title | Organization | Program Area | Funding Opportunity |
|------------|---------------|----------------|--------------|----------|---------------------|----------------------|--------------|----------------------------------|
| 11/17/2023 | Claim | Reimbursement | 78025-11-001 | Approved | Rail Freight Test 1 | Shenandoah Valley RR | Rail Program | 3-Rail FREIGHT Fund (CRF) - 2024 |

Recent Correspondence - Within the Last 60 Days

3.6 The **Recent Negotiations** section includes items that need to be “Negotiated” and items that have been “Negotiated” in the last 30 days

- In WebGrants the concept of “Negotiation” refers to DRPT staff-initiated edits or changes that need to be made to an application or grant component
- This can include:
 - Application component
 - Claims (i.e. Reimbursements)
 - Contract Amendment Requests
 - Contracts
 - Closeout forms
- Click anywhere on the row of the item in the “Recently Negotiated” table to navigate to the component that needs to be edited

Recent Negotiations - Due Within 30 Days

This section displays the documents that you negotiated in the last 30 days.

| Due Date | Document Type | Sub Type/Round | ID | Status | Title | Organization | Program Area | Funding Opportunity |
|------------|---------------|----------------|--------------|----------|---------------------|----------------------|--------------|----------------------------------|
| 11/17/2023 | Claim | Reimbursement | 78025-11-001 | Approved | Rail Freight Test 1 | Shenandoah Valley RR | Rail Program | 3-Rail FREIGHT Fund (CRF) - 2024 |

Recent Correspondence - Within the Last 60 Days

| Sent Date | Flag | From | To | Subject | Message |
|------------|------|-----------|-------------|---------|-----------------------------------------------------------------------------------------------|
| 10/30/2023 | 🟢 | Mike Todd | Rail Tester | Testing | Testing the Inter-System Grantee Correspondence. Where does this show up for the rail tester? |

My Site Visits - Inbox

Site Visits assigned to you personally appear below.

| Due Date | Number | Type | Status | Grant | Organization | Program Area | Funding Opportunity |
|------------|--------------|---------|---------|------------------------------|--------------------------|--------------|---------------------------------------------|
| 10/20/2023 | 489-001 | Desktop | Editing | Fiscal Test - Manual Grant 1 | Fiscal Test Organization | Rail Program | 1-Rail Industrial Access Grant (RIA) - 2024 |
| 11/01/2023 | 78025-11-003 | Desktop | Editing | Rail Freight Test 1 | Shenandoah Valley RR | Rail Program | 3-Rail FREIGHT Fund (CRF) - 2024 |

Organization Compliance

| Status | Type | Due Date | Description | Compliance Date | Resolution | Duration | Attachment 1 | Attachment 2 | Attachment 3 | Comments | Submitted By | Submitted Date |
|----------------------------|------|----------|-------------|-----------------|------------|----------|--------------|--------------|--------------|----------|--------------|----------------|
| No data available in table | | | | | | | | | | | | |

3.7 The **Recent Correspondence** section includes any correspondence regarding an application or grant initiated either by DRPT staff or the external user over the last 60 days

- This may include:
 - Requests for information or clarification
 - Sharing of information
 - Warnings of project end dates or milestones approaching
- Click anywhere on the row of the item in the Recent Correspondence table to navigate to the component that needs to be edited

Recent Negotiations - Due Within 30 Days

This section displays the documents that you negotiated in the last 30 days.

| Due Date | Document Type | Sub Type/Round | ID | Status | Title | Organization | Program Area | Funding Opportunity |
|------------|---------------|----------------|--------------|----------|---------------------|----------------------|--------------|----------------------------------|
| 11/17/2023 | Claim | Reimbursement | 78025-11-001 | Approved | Rail Freight Test 1 | Shenandoah Valley RR | Rail Program | 3-Rail FREIGHT Fund (CRF) - 2024 |

Recent Correspondence - Within the Last 60 Days

| Sent Date | Flag | From | To | Subject | Message |
|------------|------|-----------|-------------|---------|-----------------------------------------------------------------------------------------------|
| 10/30/2023 | 🟢 | Mike Todd | Rail Tester | Testing | Testing the Inter-System Grantee Correspondence. Where does this show up for the rail tester? |

My Site Visits - Inbox

Site Visits assigned to you personally appear below.

| Due Date | Number | Type | Status | Grant | Organization | Program Area | Funding Opportunity |
|------------|--------------|---------|---------|------------------------------|--------------------------|--------------|---------------------------------------------|
| 10/20/2023 | 489-001 | Desktop | Editing | Fiscal Test - Manual Grant 1 | Fiscal Test Organization | Rail Program | 1-Rail Industrial Access Grant (RIA) - 2024 |
| 11/01/2023 | 78025-11-003 | Desktop | Editing | Rail Freight Test 1 | Shenandoah Valley RR | Rail Program | 3-Rail FREIGHT Fund (CRF) - 2024 |

Organization Compliance

| Status | Type | Due Date | Description | Compliance Date | Resolution | Duration | Attachment 1 | Attachment 2 | Attachment 3 | Comments | Submitted By | Submitted Date |
|----------------------------|------|----------|-------------|-----------------|------------|----------|--------------|--------------|--------------|----------|--------------|----------------|
| No data available in table | | | | | | | | | | | | |

3.8 The **My Site Visits** section includes any site visits in the system assigned to you.

- Please note that DRPT does not plan to use the Site Visits feature within WebGrants upon launch in December 2023, but may choose to utilize it at a future time

3.9 The **Organizational Compliance** section includes information regarding any pending organizational compliance actions

- This can include:
 - FTA Certification and Insurances Documentation
 - WebGrants Entity Agreements
 - Other documents that need to be on file for compliance purposes
- Click anywhere on the row of the item in the Organizational Compliance table to navigate to the component that needs to be addressed

The screenshot displays the user interface for a Rail Tester. The left sidebar contains navigation options: Dashboard, Work Assignment (Calendar, Alerts, My Reviews, Document Repository), Funding Opportunities, Applications, Grants, Reports, and My Profile. The main content area is divided into several sections:

- Recent Negotiations - Due Within 30 Days:** A table showing a single row with columns: Due Date (11/17/2023), Document Type (Claim), Sub Type/Round (Reimbursement), ID (78025-11-001), Status (Approved), Title (Rail Freight Test 1), Organization (Shenandoah Valley RR), Program Area (Rail Program), and Funding Opportunity (3-Rail FREIGHT Fund (CRF) - 2024).
- Recent Correspondence - Within the Last 60 Days:** A table showing a single row with columns: Sent Date (10/30/2023), Flag (green checkmark), From (Mike Todd), To (Rail Tester), Subject (Testing), and Message (Testing the Inter-System Grantee Correspondence. Where does this show up for the rail tester?).
- My Site Visits - Inbox:** A section with a sub-header "Site Visits assigned to you personally appear below." followed by a table with columns: Due Date, Number, Type, Status, Grant, Organization, Program Area, and Funding Opportunity. It lists two entries: one from 10/20/2023 (Fiscal Test - Manual Grant 1) and one from 11/01/2023 (Rail Freight Test 1).
- Organization Compliance:** A section with a sub-header "Organization Compliance" (highlighted with a red box) and a table with columns: Status, Type, Due Date, Description, Compliance Date, Resolution, Duration, Attachment 1, Attachment 2, Attachment 3, Comments, Submitted By, and Submitted Date. Below the table, it states "No data available in table".