Work Manager

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Egrants External User Tasks and Alerts Quick Start Guide

This Quick Start Guide will describe the possible tasks and alerts that can appear in your Egrants Work Manager.

Note: All external users with security to an agency have access to Work Manager and can receive tasks and alerts.

We begin with a definition of task and alert:

Task: A task is a work item that must be performed. If a User receives a task, some action must be taken within Egrants on your Application or Report to clear the task. The Primary Contact associated with each application/subgrant will receive all tasks.

Alert: An alert is a notification of an event that has occurred or of an activity that is pending within the Egrants system regarding your Application or Report. No action by the recipient is required. The User can manually clear any alerts received.

How you will know you have a task or an alert:

Whenever a task or alert is sent to your Work Manager, you will be contacted via email. Emails are sent once a day. The email will not tell you the specifics of the task or alert in your Work Manager, it will simply prompt you to check it. You will not receive notice of a task or alert if you have already read the new task or alert.

The following definitions explain the various pieces of information identified with each task and alert:

Ref Num: A unique number by type of task or alert used by CJC to identify each specific task and alert.

Action: The action is always Create or Clear. This indicates that the task or alert is going to be created when the trigger occurs or, if the task is cleared, when the trigger occurs. It may be action on the part of the External User, CJC staff or it may be a system-generated action.

Type: Type refers to either a "task" or an "alert."

Category: This refers to the various areas within Egrants such as applications, concept papers, program reports, etc.

User Action: This refers to the action taken by the External User, CJC staff or a systemgenerated action that triggers the task or alert.

Title: This refers to the title that appears in the Work Manager for the task or alert.

Recipients: This refers to who will receive either the task or alert.

Trigger: The trigger identifies what action has occurred to result in a task or an alert being created.

Screen Name: This refers to the destination screen if the link is selected in work manager. This will transfer you to the screen name identified here in order to review or perform the desired action.

The tasks and alerts below are listed alphabetically by category. The categories include:

Applications Concept Papers Continuations Fiscal (Fiscal Reports) Inventory Reports Modifications (Project Modification Requests) Program Reports User Management (Registration and Security Role establishment)

| Catego Ref Nu | r y: Applications m: 2525 | Title: Action: | Application Title Create | Type: User Action: | | | | |
|------------------|--|---|-----------------------------|-----------------------|----------------------|--|--|--|
| Recipien | ts: External Application | | | Project Director, ar | d Signatories that | | | |
| Trigge | er: Status changed Application | Status changed to `Open-Awarded' and Save button hit on main summary for Application | | | | | | |
| Screen Nam | i e: Application - Ap | pplication Su | mmary (extProject | MgmtAP_Summary) | | | | |
| Catego Ref Nu | r y: Applications m: 2527 | Title: Action: | Application Title Create | Type: User Action: | Alert Disapproved | | | |
| Recipien | • • | External Application Contact, Financial Officer, Project Director, and Signatories that the application was closed and disapproved. | | | | | | |
| Trigge | er: Status changed | to 'Closed-I | Disapproved" and S | ave button hit on th | ne main summary | | | |
| Screen Nam | e: Application - Is | sues/Comm | ents Listing (extPro | jectMgmtAP_Issues0 | Comments) | | | |
| | | | | | | | | |

| Category: Ref Num: | Applications 2000 | Title: Action: | Application Title Create | Type: User Action: | Alert Issues/Comments Review Required |
|-----------------------|---------------------------------------|-------------------|--|-----------------------|---|
| Recipients: | Contact, Financial | Officer, F | Project Director | | |
| Trigger: | Release All Extern egProjectMgmtPR | | and Comments' buttor omments | is selected on | |
| Screen Name: | Application - Issu | es/Comm | ents Listing (extProject | MgmtAP_Issues(| Comments) |
| Category: Ref Num: | | Title: Action: | Application Title Create | Type: User Action: | |
| Recipients: | | | t, Financial Officer, Pro for Administration Reje | | d Signatories that |
| Trigger: | Status changed to summary page | o 'Closed- | - Adminstrative Reject | tion" and Save b | utton hit on main |
| Screen Name: | Application - Issu | es/Comm | ents Listing (extProject | MgmtAP_Issues(| Comments) |
| Category: Ref Num: | | Title: Action: | Application Title Create | Type: User Action: | |
| Recipients: | External Application was Returned. | on Contac | t, Project Director, and | Financial Office | r that the application |
| Trigger: | Status changed to egProjectMgmtAP | • | eturned' and Save butt nmary | on hit on | |
| | | | ents Listing (extProject | - | |
| Category: | Applications 2521 | Title: Action: | Application Title Create | Type: User Action: | Alert Withdrawn |
| Recipients: | Contact, Signator | ies, Finan | cial Officer, Project Dire | ector | |
| Trigger: | Status changed to egProjectMgmtAP | | Withdrawn' and Save b nmary | utton hit on | |
| Screen Name: | Application - Main | ı Summar | y section (extProjectMo | gmtAP_MainSum | mary) |

| Category: Ref Num: | Applications 2553 | Title: Action: | Application Title Create | Type: User Action: | |
|-----------------------|---------------------------------------|-------------------|----------------------------------|-----------------------|---|
| Recipients: | External Contact | | | | |
| Trigger: | Status changed to egProjectMgmtAP | | eturned' and Save butto nmary | n hit on | |
| | | | ents Listing (extProjectN | - | |
| Category: | | Title: | Application Title | Type: | Task |
| Recipients: | External Contact | | | | |
| Trigger: | Submit Applicatio | n button ŀ | nit on extProjectMgmtAF | P_Summary | |
| | No Destination - | | noved. | | |
| Category: Ref Num: | Concept Papers 2003 | Title: Action: | Concept Paper Title Create | Type: User Action: | Alert Issues/Comments Review Required |
| Recipients: | Contact, Financial | l Officer, P | Project Director | | |
| Trigger: | Release All Exterr egProjectMgmtPR | | and Comments' button omments | is selected on | |
| Screen Name: | Concept Paper - I | ssues/Cor | nments Listing (extProj | ectMgmtCP_Issu | iesComments) |
| Category: Ref Num: | | | Concept Paper Title Create | Type: User Action: | |
| Recipients: | Contact, Signator | ies, Finan | cial Officer, Project Dire | ctor | |
| Trigger: | Status changed to egProjectMgmtCP | | Withdrawn' and Save bu Y | itton hit on | |
| Screen Name: | Concept Paper - S | Summary | (extProjectMgmtCP_Sur | nmary) | |

| Category: Ref Num: | Continuations 2526 | Title: Action: | Continuation Title Create | Type: User Action: | |
|-------------------------|---|--|---|-----------------------|---|
| Recipients: | External Application wa | | t, Financial Officer, Proj d. | ect Director, ar | nd Signatories that |
| Trigger: | Status changed to Continuation | o `Open-Av | warded' and Save butto | n hit on main s | ummary for |
| | | | xtProjectMgmtCO_Sum | | |
| | Continuations | | Continuation Title Create | Type: User Action: | Alert |
| Recipients: | External Contact, | Project Di | rector & Financial Office | er | |
| Trigger: | Additional phases the project end da | | and current date is a g | iven number of o | days (150) before |
| Screen Name: | Project - Project S | Summary | (extProjectMgmtPR_Su | mmary) | |
| Category: Ref Num: | | Title: Action: | Continuation Title | Туре: | Alert |
| Recipients: | External Application wa | | t, Financial Officer, Proj and disapproved. | ect Director, ar | nd Signatories that |
| Trigger: | Status changed to |) `Closed-I | Disapproved" and Save | button hit on th | ne main summary |
| Screen Name: | Continuation - Iss | sues/Comr | nents Listing (extProjec | tMgmtCO_Issue | esComments) |
| Category: | | | | | |
| Ref Num: | Continuations 2001 | Title: Action: | Continuation Title Create | Type: User Action: | Alert Issues/Comments Review Required |
| Ref Num: Recipients: | | Action: | Create | | Issues/Comments |
| | 2001 Contact, Financial | Action: Officer, P | Create roject Director and Comments' button | User Action: | Issues/Comments |
| Recipients: Trigger: | 2001 Contact, Financial Release All Extern egProjectMgmtPR | Action: Officer, P nal Issues _IssuesCo | Create roject Director and Comments' button | User Action: | Issues/Comments Review Required |

| Category: Ref Num: | Continuations 2531 | Title: Action: | Continuation Title Create | Type: User Action: | |
|-----------------------|--------------------------------------|-------------------|--|-----------------------|--------------------|
| Recipients: | | | t, Financial Officer, Pre for Administration Reje | | d Signatories that |
| Trigger: | Status changed to summary page | o 'Closed- | - Adminstrative Rejec | tion" and Save b | utton hit on main |
| Screen Name: | Continuation - Iss | sues/Comr | nents Listing (extProje | ectMgmtCO_Issue | esComments) |
| Category: Ref Num: | | Title: Action: | Continuation Title Create | Type: User Action: | |
| Recipients: | •• | | t, Financial Officer, Propplication was Returne | | gnatories and |
| Trigger: | Status changed to egProjectMgmtCO | • | eturned' and Save but 'Y | ton hit on | |
| Screen Name: | Continuation - Iss | | ments Listing (extProje | | esComments) |
| Category: Ref Num: | | | Continuation Title | | |
| Recipients: | Contact, Signator | ies, Finan | cial Officer, Project Dir | rector | |
| Trigger: | Status changed to egProjectMgmtCO | | Withdrawn' and Save I 'Y | outton hit on | |
| Screen Name: | Continuation - Ma | in Summa | ary section (extProject | :MgmtCO_MainSu | mmary) |
| Category: Ref Num: | Continuations 2554 | Title: Action: | Continuation Title Create | Type: User Action: | |
| Recipients: | External Contact | | | | |
| Trigger: | Status changed to egProjectMgmtCO | | eturned' and Save but 'Y | ton hit on | |
| Screen Name: | Continuation - Iss | sues/Comr | ments Listing (extProje | ectMgmtCO_Issue | esComments) |

| Category: Ref Num: | Continuations 2510 | Title: Action: | Continuation Title Clear | Type: User Action: | Task Returned |
|--|---|---|---|---|--|
| Recipients: | External Contact | | | | |
| Trigger: | Submit Applicatio | n button ł | nit on extProjectMgmtC | O_SummaryMair | 1 |
| | No Destination - | | noved. | | |
| Category: Ref Num: | Fiscal | Title: | Project Phase Title | | Alert |
| Recipients: | External Contact, | Project Di | irector and Financial Of | ficer for the proj | ect |
| Trigger: | Approve' button is | s clicked o | on egProjectMgmtMN_Fi | iscalReportsUpda | ate |
| Screen Name: | | , - | grantee Report (extProj | - | , |
| | Fiscal | | Project Phase Title | | Alert |
| Recipients: | Internal Program | Contact , | Project Director, Financ | cial Officer, Cont | act |
| - | | | | | |
| - | Revise button hit | on egProj | ectMgmt_FiscalReports | Update by intern | al staff |
| Trigger: Screen Name: | Monitoring - Quar | terly Subo | grantee Report (extProj | ectMgmtMN_Fise | calReportsUpdate) |
| Trigger: Screen Name: | Monitoring - Quar Fiscal | terly Subo Title: | grantee Report (extProj Project Phase Title | ectMgmtMN_Fiso | calReportsUpdate) |
| Trigger: Screen Name: Category: Ref Num: | Monitoring - Quar Fiscal 1411 | terly Subo Title: Action: | grantee Report (extProj Project Phase Title | ectMgmtMN_Fise Type: User Action: | calReportsUpdate) Alert Fiscal Reports Due |
| Trigger: Screen Name: Category: Ref Num: | Monitoring - Quar Fiscal 1411 External Contact Report is overdue | Title: Action: and Finance. | grantee Report (extProj Project Phase Title Create | ectMgmtMN_Fiso Type: User Action: ect (30 days) after | calReportsUpdate) Alert Fiscal Reports Due in 2 weeks |
| Trigger: Screen Name: Category: Ref Num: Recipients: Trigger: Screen Name: | Monitoring - Quar Fiscal 1411 External Contact a Report is overdue report date if the Monitoring - Main | Title: Action: and Finance under a left quarterly Summary | grantee Report (extProj Project Phase Title Create cial Officer for the proje rt is generated 1 month report is not yet submi y (extProjectMgmtMN_S | ectMgmtMN_Fise Type: User Action: ect (30 days) after tted. Summary) | calReportsUpdate) Alert Fiscal Reports Due in 2 weeks |
| Trigger: Screen Name: Category: Ref Num: Recipients: Trigger: Screen Name: Category: | Monitoring - Quar Fiscal 1411 External Contact of Report is overdue report date if the Monitoring - Main | Title: Action: and Finance . The aler quarterly Summary | grantee Report (extProj Project Phase Title Create cial Officer for the proje rt is generated 1 month report is not yet submi y (extProjectMgmtMN_S Project Phase Title | ectMgmtMN_Fise Type: User Action: ect (30 days) after tted. Summary) | calReportsUpdate) Alert Fiscal Reports Due in 2 weeks the quarter ending Alert |
| Trigger: Screen Name: Category: Ref Num: Recipients: Trigger: Screen Name: Category: Ref Num: | Monitoring - Quar Fiscal 1411 External Contact of Report is overdue report date if the Monitoring - Main Fiscal | Title: Action: and Finance quarterly Summary Title: Action: | project Phase Title Create cial Officer for the project rt is generated 1 month report is not yet submine ((extProjectMgmtMN_S Project Phase Title Create | ectMgmtMN_Fise Type: User Action: ect (30 days) after tted. Summary) Type: | calReportsUpdate) Alert Fiscal Reports Due in 2 weeks the quarter ending Alert |
| Trigger: Screen Name: Category: Ref Num: Recipients: Trigger: Screen Name: Category: Ref Num: | Monitoring - Quar Fiscal 1411 External Contact a Report is overdue report date if the Monitoring - Main Fiscal 1504 Project Director, R | Title: Action: and Finance to The alequarterly Summary Title: Action: | project Phase Title Create cial Officer for the project rt is generated 1 month report is not yet submine ((extProjectMgmtMN_S Project Phase Title Create | ectMgmtMN_Fise Type: User Action: ect (30 days) after tted. Summary) Type: | calReportsUpdate) Alert Fiscal Reports Due in 2 weeks the quarter ending Alert |
| Trigger: Screen Name: Category: Ref Num: Recipients: Trigger: Screen Name: Category: Ref Num: Recipients: | Monitoring - Quar Fiscal 1411 External Contact A Report is overdue report date if the Monitoring - Main Fiscal 1504 Project Director, R Fiscal report is su | terly Subg Title: Action: and Finand and Finand quarterly Summary Title: Action: Financial C bmitted fr | project Phase Title Create cial Officer for the project rt is generated 1 month report is not yet submine ((extProjectMgmtMN_S Project Phase Title Create Dfficer, Contact | ectMgmtMN_Fise Type: User Action: ect (30 days) after tted. Summary) Type: User Action: | calReportsUpdate) Alert Fiscal Reports Due in 2 weeks the quarter ending Alert Submitted |

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| Category: Ref Num: | Fiscal 1506 | Title: Action: | Project Phase Title Create | Type: User Action: | |
|-----------------------|--|-------------------|---|-----------------------|------------------------------|
| Recipients: | Project Contact | | | | |
| Trigger: | When the 'Revise internal staff | ' button or | n egProjectMgmtMN_F | iscalReportsUpda | te is hit by the |
| Screen Name: | Monitoring - Fisca (extProjectMgmtN | | orrective Actions List tiveActions) | | |
| Category: Ref Num: | | Title: Action: | Project Phase Title Clear | Type: User Action: | |
| Recipients: | Project Contact | | | | |
| Trigger: | for the correspon | ding repor | selected on the extPro t or the submit button portsUpdate page. | | |
| Screen Name: | No Destination - | Task is ren | | | |
| Category: | | Title: | Project Phase Title | | Alert |
| Ref Num: | Reports 1902 | Action: | Create | User Action: | Approved |
| Recipients: | Project Director, | Financial C | officer, and External Co | ontact | |
| Trigger: | 'Approve' button | on egProje | ctMgmtMN_Inventory | Reports hit | |
| Screen Name: | Monitoring - Inve | ntory Repo | ort (extProjectMgmtMN | I_InventoryRepor | ts) |
| Category: | | Title: | Project Phase Title | Туре: | Alert |
| Ref Num: | Reports 1903 | Action: | Create | User Action: | Inventory Report Returned |
| Recipients: | Project Director, | Financial C | Officer, External Contac | ct | |
| Trigger: | Inventory Report InventoryReports | | l for return ('Revise' b | utton on egProjeo | ctMgmtMN_ |
| | , , , | • | | | |

| Category: | Inventory Reports | Title: | Project Phase Title | Туре: | Task | |
|-----------------------|---|-------------|---|-----------------------|------------------------------|--|
| Ref Num: | • | Action: | Create | User Action: | Inventory Report Returned | |
| Recipients: | External Contact | | | | | |
| Trigger: | Inventory Report InventoryReports | | d for return ('Revise' bu | tton on egProjeo | ctMgmtMN_ | |
| Screen Name: | Monitoring - Inver | ntory Repo | ort (extProjectMgmtMN_ | _InventoryRepor | ts) | |
| Category: | Inventory Reports | Title: | Project Phase Title | Туре: | Task | |
| Ref Num: | - | Action: | Clear | User Action: | Inventory Report Returned | |
| Recipients: | External Contact | | | | | |
| Trigger: | Submit Report' button is selected on the page extProjectMgmtMN_InventoryReports for the corresponding report or an internal submit occurs ('Submit Report' button is selected on the page egProjectMgmtMN_InventoryReports for the corresponding report). | | | | | |
| | No Destination - 1 | | noved. | | | |
| Category: | | | Modification Title | Type: User Action: | Alert | |
| Recipients: | External Modificat | ion Conta | ct, Financial Officer, and | d Project Directo | or | |
| Trigger: | | | varded', 'Submitted By' Save button hit on egP | | | |
| Screen Name: | | | ry section (extProjectMo | - | - | |
| Category: Ref Num: | Modifications | | Modification Title | Type: User Action: | Alert | |
| Recipients: | External Application wa | | t, Financial Officer, Proj and disapproved. | ect Director, ar | d Signatories that | |
| Trigger: | Status changed to |) 'Closed-I | Disapproved" and Save | button hit on th | ne main summary | |
| Screen Name: | Modification - Issu | ues/Comm | nents Listing (extProject | :MgmtMO_Issue: | sComments) | |

| Category: Ref Num: | | Title: Action: | | Type: User Action: | |
|-----------------------|---|---------------------|--|-----------------------|--|
| Recipients: | Contact, Financia | l Officer, F | Project Director | | |
| Trigger: | Release All Exterr egProjectMgmtPR | | and Comments' button omments | is selected on | |
| Screen Name: | Modification - Iss | ues/Comn | nents Listing (extProject | :MgmtMO_Issue | sComments) |
| | | Title: Action: | Modification Title Create | Type: Action: CJC | Alert User Staff Processed a Project Modification |
| Recipients: | External Modificat | tion Conta | ct, Financial Officer, and | d Project Directo | or |
| Trigger: | | | warded', 'Submitted By' tton hit on egProjectMo | | |
| Screen Name: | | | ry section (extProjectM | - | |
| Category: Ref Num: | Modifications 2535 | Title: Action: | Modification Title Create | Type: User Action: | |
| Recipients: | External Contact, | Financial | Officer, Project Director | | |
| Trigger: | | | ted By Date are both fill MgmtMO_Modification | ed in for the firs | st time and Save |
| Screen Name: | Modification - Mai | in Summa | ry section (extProjectM | gmtMO_Modifica | ition) |
| Category: Ref Num: | Modifications 2564 | Title: Action: | Modification Title Create | Type: User Action: | |
| Recipients: | Project Director, I | Financial (| Officer, Contacts | | |
| Trigger: | Status changed to egProjectMgmtAP egProjectMgmtCC egProjectMgmtM | _MainSun)_Summa | ry, | on hit on | |
| Screen Name: | Modification - Iss | ues/Comn | nents Listing (extProject | MgmtMO_Issue | sComments) |

| Category: Ref Num: | Modifications 2523 | Title: Action: | Modification Title Create | Type: User Action: | |
|-----------------------|--------------------------------------|-------------------|----------------------------------|-----------------------|---------------|
| Recipients: | Contact, Signator | ies, Finan | cial Officer, Project Dire | ctor | |
| Trigger: | Status changed to egProjectMgmtMC | | Withdrawn' and Save bu ation | itton hit on | |
| | | | Details (extProjectMgmt | | |
| | Modifications | | Modification Title | | Task |
| Recipients: | External Contact | | | | |
| Trigger: | Status changed to egProjectMgmtMC | | eturned' and Save butto Ition | on hit on | |
| | | | nents Listing (extProject | - | · |
| Category: Ref Num: | | | Modification Title Clear | Type: User Action: | |
| Recipients: | External Contact | | | | |
| Trigger: | Submit Applicatio extProjectMgmtM | | | | |
| | No Destination - ⁻ | | noved. | | |
| Category: | | | Individual Title | Туре: | |
| Recipients: | Group Owner | | | | |
| Trigger: | A user's personal | profile ha | s been updated through | n Individual Clea | rance Manager |
| Screen Name: | User Managemen | t - Profile | Details (extUserMgmt_l | Profile) | |

| Category: | | Title: | Project Phase Title | Туре: | Alert |
|-------------------------------|---|-------------------|--|-----------------------|-------------------------------------|
| Ref Num: | Reports 2404 | Action: | Create | User Action: | Periodic Program Report Approved |
| Recipients: | External Contact, | Project Di | rector, Financial Officer | | |
| Trigger: | 'Approve' button o | on egProje | ectMgmtMN_ProgramMa | in was selected | |
| Screen Name: | | | rt (extProjectMgmtMN_ | | |
| Category: | Program Reports | | Project Phase Title | | |
| Ref Num: | | Action: | Create | User Action: | Program Report Returned |
| Recipients: | Project Director, F same as the Proje | | Officer, User who submi [.] t | tted the report I | F he/she is not the |
| Trigger: | Revise button hit | on egProj | ectMgmt_ProgramMain | by internal staff | |
| Screen Name: | Monitoring - Prog | ram Repor | t (extProjectMgmtMN_ | | |
| Category: | Program Reports | Title: | Project Phase Title | | Alert |
| Ref Num: | 1412 | Action: | Create | User Action: | Program Reports Due in 2 Weeks. |
| Recipients: | External Contact a | and Projec | t Director for the proje | ct | |
| Trigger: | Report is due in t | wo weeks | | | |
| | | | | | |
| Screen Name: | Monitoring - Main | Summary | <pre>/ (extProjectMgmtMN_S</pre> | ummary) | |
| Screen Name: Category: | Program | | v (extProjectMgmtMN_S Project Phase Title | | Alert |
| | | | Project Phase Title | | |
| Category: | Program Reports 2406 | Title: Action: | Project Phase Title Create | Туре: | |
| Category: Ref Num: | Program Reports 2406 Project Director, F | Title: Action: | Project Phase Title Create | Type: User Action: | |

| Category: | Program Reports | Title: | Project Phase Title | Туре: | Task | | |
|--------------------|--|---|--|--------------|----------------------------|--|--|
| Ref Num: | - | Action: | Create | User Action: | Program Report Returned | | |
| Recipients: | Project Contact | | | | | | |
| Trigger: | | Periodic Program Report is selected for return ('Revise' button on egProjectMgmtMN_FiscalReportsUpdate is selected) | | | | | |
| Screen Name: | Monitoring - Prog (extProjectMgmtM | • | t Corrective Actions Lis tiveActions) | t | | | |
| Category: | Program Reports | Title: | Project Phase Title | Туре: | Task | | |
| Ref Num: | - | Action: | Clear | User Action: | Program Report Returned | | |
| Recipients: | Project Contact | | | | | | |
| Trigger: | Either the 'Submit Report' button is selected on the page extProjectMgmtMN_FiscalReportsUpdate for the corresponding report or an internal submit occurs ('Submit Report' button is selected on the page egProjectMgmtMN_FiscalReportsUpdate for the corresponding report). | | | | | | |
| Screen Name: | No Destination - 7 | Fask is rer | noved. | | | | |