

Notes Tab

To view Grant Project notes, click the **Notes** tab.



Figure 1: Grant Details screen with Notes tab

1. The **Notes** tab opens. Features within this tab are currently unavailable. A “Coming Soon” message appears in the middle of the tab.

Note: For some Non-Discretionary only users, the Reports tab will display a "Coming Soon" message. No other actions are available, so the users will not see an option to return to the Classic view.



Figure 2: Notes tab with Coming Soon message

2. If you have the ability to access Grant Notes, you may click on the **View Grant Notes** button below the "Coming Soon" message.

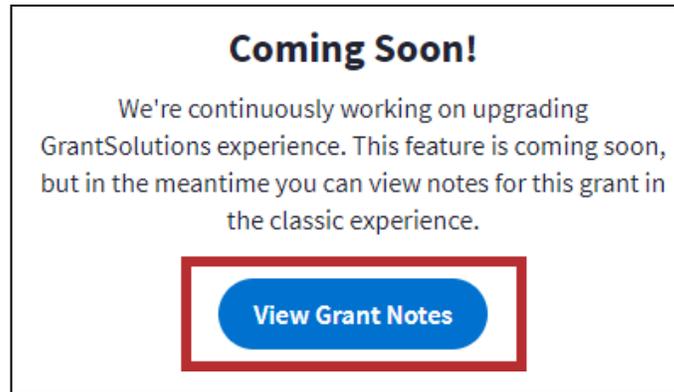
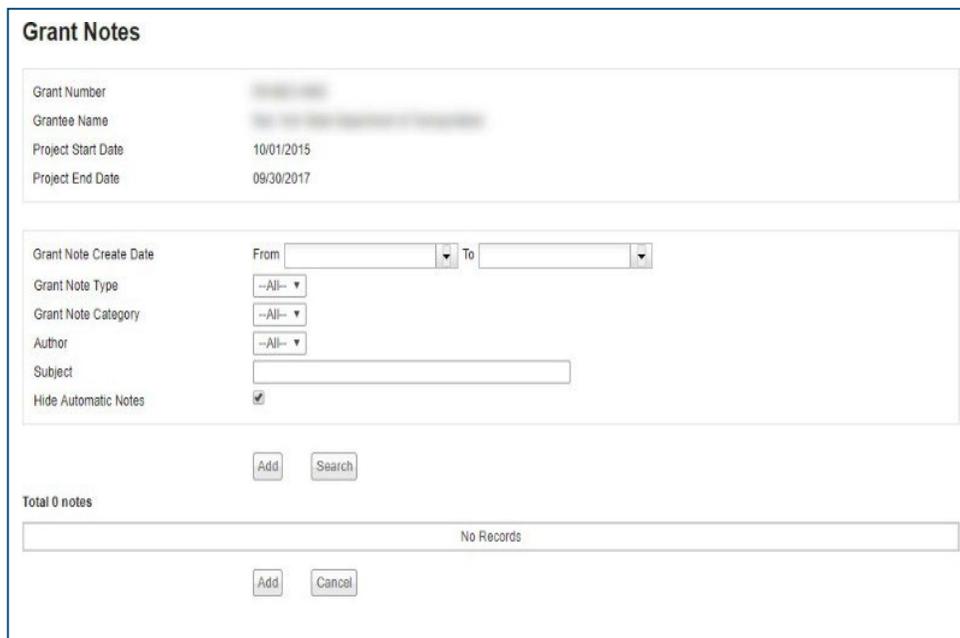


Figure 3: Notes tab with View Grant Notes button

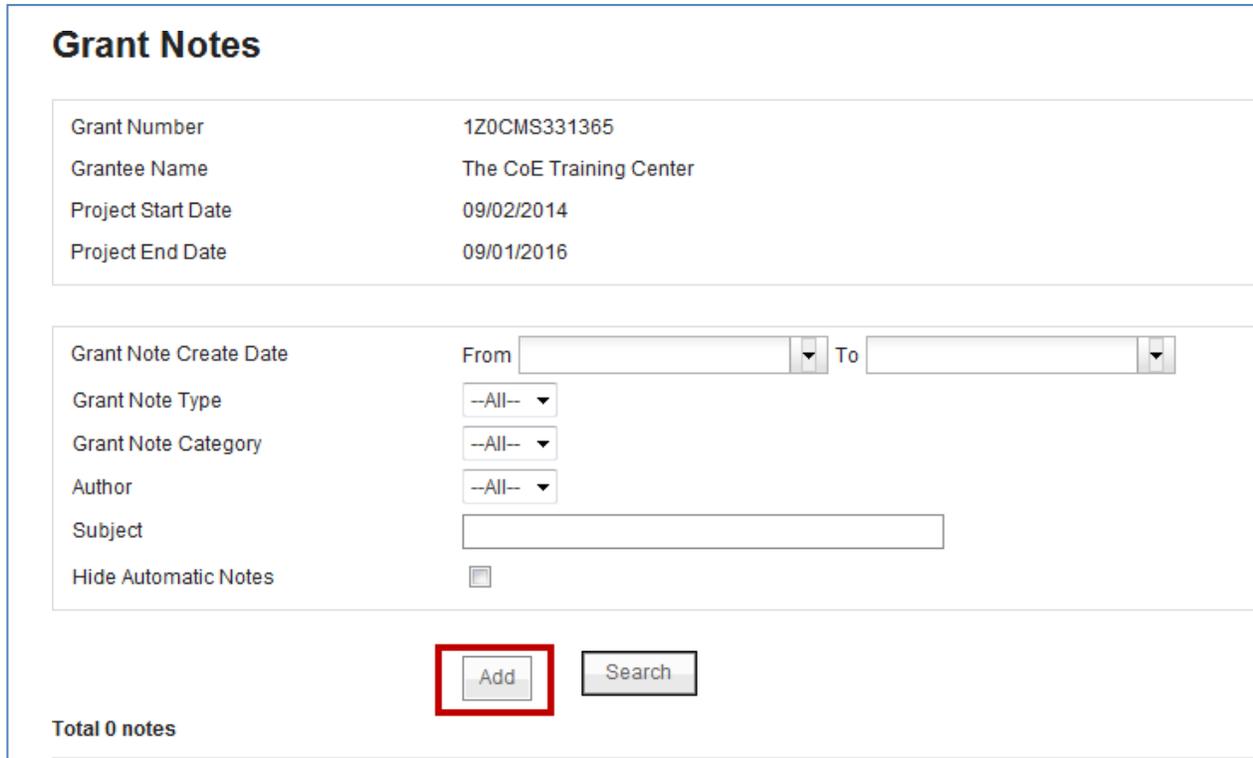
3. Users are routed to the *Grant Notes* screen in the GrantSolutions GMM.



The image shows a screenshot of the "Grant Notes" screen. The title "Grant Notes" is at the top left. Below it, there is a form with several fields: "Grant Number", "Grantee Name", "Project Start Date" (10/01/2015), and "Project End Date" (09/30/2017). Below these fields, there are filters for "Grant Note Create Date" (From and To dropdowns), "Grant Note Type" (dropdown), "Grant Note Category" (dropdown), "Author" (dropdown), "Subject" (text input), and "Hide Automatic Notes" (checkbox). There are "Add" and "Search" buttons below the filters. At the bottom, there is a section for "Total 0 notes" with a table showing "No Records" and "Add" and "Cancel" buttons.

Figure 4: Grant Notes screen

4. To add a new note, scroll down towards the bottom of the window and click the **Add** button.



Grant Notes

Grant Number	1Z0CMS331365
Grantee Name	The CoE Training Center
Project Start Date	09/02/2014
Project End Date	09/01/2016

Grant Note Create Date From To

Grant Note Type

Grant Note Category

Author

Subject

Hide Automatic Notes

Total 0 notes

Figure 5: Grant Notes screen with Add button

5. The “Grant Note-Add” screen displays. Enter information in the required fields (indicated by a red asterisks).
- Subject: Enter the subject of the note. Conform to any naming conventions
 - Note Type: Correspondence is the only option and is automatically selected
 - Category Type: Select from the pre-set list of categories
 - Notes: Enter the note text (limit of 2000 characters)
 - Note Attachments (Optional): Attach one or more files by entering a file description and uploading desired attachments

6. When done, click the Submit button.

Grant Notes - Add

Author: Anna-Lisa Walters-grantee

Subject *

Note Type * Correspondence

Category Type *

Notes *
(Limit to 2000 characters)

Note Attachments

Author: Anna-Lisa Walters-grantee

Description:

File to Upload: No file chosen

Description	Source Attachments	Status	Actions
Training Note	Budget.docx	SUCCESSFUL	

* Status updates every 10 seconds

Figure 6: Grant Notes Add screen with Submit button

7. The “Grant Notes” screen reappears. Once a note is submitted, it is available for viewing in the GrantSolutions GMM.

When the automatically generated email notification is sent to the assigned Principal Investigator/Program Director and Grantee Authorizing Official, the Grant Note is not contained in the body of the email. The user must log into the GrantSolutions GMM to view the Grant Note.

Update: The ability to modify or delete notes is no longer available to grantees. Only the grantor agency can **Edit** or **Delete** the note.

8. Click the **Cancel** button to close the window and return to the “My Grants List” screen.

Add
Search

Total 1 notes 1

Subject	Category	Grant Note Type	Author	Date	Support Year	Application Number	Bulk Notes	Action
Training Note	Other	Correspondence	Anna-Lisa Walters-grantee	11/13/2015 09:26 (GMT -04:56) EST	1	FO2015000369 90FO0012	No	  

Add
Cancel

Figure 7: Grant Notes screen with Cancel button