Department of Parks and Recreation

Division of Boating and Waterways

2017 / 18 QUAGGA AND ZEBRA MUSSEL

INFESTATION PREVENTION

GRANT PROGRAM

ON-LINE GRANTS APPLICATION (OLGA) INSTRUCTIONS

The Division of Boating and Waterways

On-Line Grants Application (OLGA)

STEP-BY-STEP INSTRUCTIONS

Welcome to the On-Line Grants Application (OLGA) powered by EGrAMS. OLGA is a web-based, end-to-end solution supporting the entire grant life cycle process. OLGA offers a streamlined solution to the California State Parks, Division of Boating and Waterways (DBW) QZ Mussel Infestation Prevention grant program.

This document provides detailed instructions to enable you to navigate through the complete OLGA application process.

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STEP 1: ACCESS OLGA

    1.1)   Open the DBW website at www.dbw.ca.gov

    1.2)   Click on the Grants & Loans tab.

    1.3)   Click on the Quagga and Zebra Mussel Prevention Grant link.

    1.4)   Click on the **"2017/18 QZ Mussel Prevention Grant Application"** link on the left under Highlights.

    1.5)   You are now in the OLGA site on the Home page.

STEP 2: VALIDATE YOUR WORKSTATION

    2.1)   Click on the "Validate Workstation" link on the left of the OLGA Home page.

    2.2)   Click on the "Validate" button in the lower middle section of this page.

    2.3)   You should now see three green checked boxes for JavaScript, Popups* and Support Browser enabled. If so, you are ready to proceed to the next step.

*If you have a red "x" in the Popups enabled box, the most common problem is that your computer has pops ups blocked. You will need to unblock these. Click on the Tools icon in your browser, select "Internet Options">Privacy tab>**uncheck** "Turn on Pop up Blocker">click "OK." This will allow pop ups that OLGA uses. If you have other problems, you may need to contact your internal IT department for assistance. Click "Validate" the red mark should be removed from the enable box.

A table of supported browsers is identified here. If you need to update to the most current version click on the link of the browser you use.

Also, if your computer needs Adobe Acrobat Reader, click the link to download the free Adobe Acrobat Reader (use the scroll bar to locate the link).

NOTE: At any time while *in* the OLGA application, use the <mark>SAVE →</mark> button to save your work and move to the next page (see #1 below), or use navigation arrows (#2 below) to move within the OLGA application. Make sure you SAVE your work before moving to another page. IMPORTANT: <u>Do not use the back arrow of your browser on the top left of your screen or you will be booted out of OLGA</u>.

#1: SAVE→ and move to next page
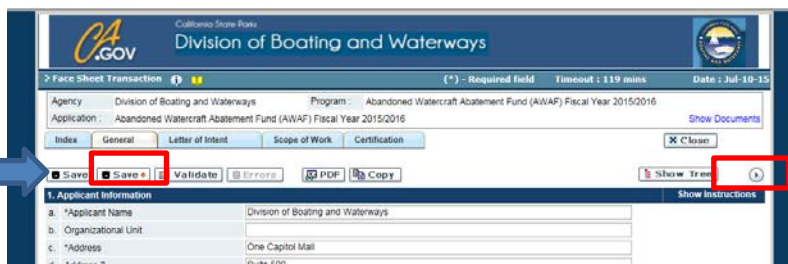
#2: Use these navigation arrows only

STEP 3: REGISTER YOUR AGENCY

All agencies must enter their agency information in OLGA to be registered; however, if your agency has applied for a grant through DBW or Parks' Off Highway Vehicles (OHV) Division, your agency is already registered. If not, you must register your agency here. *It is only necessary to register ONCE for all California State Parks grants that uses OLGA*.

To check if your agency is registered:

3.1) Click on the "Register Your Agency" link in the OLGA Home screen (left side of the Home page).

3.2) On the "Agency Information" page, click on the Look-up Field button (example below) to check if your agency is already registered.

3.3) A pop up screen will appear. Search for your agency by one of two methods:

A. **Short method**: Leave the Federal ID field box blank. In the Description field box, type the wildcard symbol identifier, %, followed by your agency name, and end with another wildcard symbol. **Example: %San Diego%.** Click the "Look-up" button.

B. **Long Method**: Use the scroll bar in this window to look for your agency. This list is separated into many pages; just above the "Org. Unit" category there are page navigation arrows to move through these pages.

3.4) **If your agency name appears**, you are registered. Do not select anything here. Close the window by clicking on the red "X" in the top right and skip to Step 4: Create User Profile.

If your agency name does NOT appear, close the window by clicking on the red "X" in the top right section of this window. In the window that opens, follow the next steps to register your agency by completing the information requested. Fields with asterisks indicate information is required.

3.5) **Federal ID & Agency Name boxes**: Enter your Fed ID# in the first box and your agency's complete name in the next box to the right. If you do not know your Fed ID#, enter numbers 1 through 8. Advise DBW of your correct number as soon as possible.

3.6) **Vendor Number**: This number is assigned to your agency by the state. If unknown, enter your phone number and request DBW to enter your number. DBW will be able to look up this number in the state's system.

3.7) At the field, "Agency Type" please click the look-up box and select your appropriate type by clicking in the small box to the left of your selection.

3.8) The next field "Sub-Type" is not necessary to complete.

3.9) Complete the "Contact Information" section with your name and info.

3.10) In the bottom left section for "Code, County and Primary" select the look-up box and select your county. Then, click on the "Primary" box to check it (for multi-area agencies only one 'Primary' is allowed—select one).

3.11) Click on the "OK" button, located bottom right.

Your agency is now registered indefinitely. You will not need to register again for future grants.

STEP 4: CREATE USER PROFILE

OLGA requires users to create a user profile. Each user must have a valid user name and password to login into OLGA.

Before you attempt to create your user profile, ensure that your agency information has been registered in OLGA (See Step 3: Register Your Agency).

4.1) Select "Create User Profile" link in the OLGA Home screen to create your user profile.

4.2) Complete the information requested in this window. Fields with asterisks indicate information is required. **Be sure to write down your login name and password and keep in a safe, separate location**.

4.3) At the **Designation/Title field**, click the look-up box and select a title that closest fits your position. Click in the small box to check it and the User Profile window will return.

4.4) **Role Code: IMPORTANT**: Click the look-up field and select the box for "GRANTE / Grant Applicant." If you select anything else you will not be able to enter information in the application.

4.5) Click the "Parent Agency" look-up box and select your agency (either by the wildcard method or by scrolling through the pages). Click in the box next to the name to select it and the window will close.

4.6) Select your county by clicking on the look-up field button.

4.7) Click on the "Show Security" button and answer questions for security purposes. Click on the look-up button to the right of the question boxes and select a question of your choice. Write your answers down and keep in a safe, separate location. You will need to know the answers to these questions if you need to reset your password in the future.

4.8) Click the "OK" button at the bottom right of the screen.

4.9) You will return to the Home screen. You will need to follow the next step to log in.

STEP 5: EGRAMS (OLGA) LOGIN

You will login each time to OLGA to create a new application or access an existing one (to access, see Step 7). **NOTE: You may be prompted to the log in screen after creating your user profile.**

5.1) From the OLGA Home page, click on the link "EGrAMS (OLGA) Login on the left side.

5.2)   Enter your user name and password. If you need to change or have forgotten your password, you may click on one of the "Change Password" or "Forgot Password" buttons in this box and follow the prompts.

5.3)   The Welcome Screen will appear addressing you by name. If you wish to update your User Profile, click on the link in the middle of the greeting dialogue that states, "click here." If you have any problems, contact the DBW program administrator to assist you. The contact info is located below in this welcome page.

STEP 6: START A NEW APPLICATION

The person creating the application becomes the "Project Administrator" (PA). Only the PA has complete authority of the application, including the ability to allow/limit access of other users to work in the application. (Assign Agency Users, Step #8). Two PA's are allowed per agency, and it is recommended that each agency has two. The first PA will provide authorization to the second PA in Step 8.

6.1)   Select the "OLGA Menu" link located at the footer of the "Welcome" screen (look closely--it's very small! NOTE: you will use this link frequently throughout OLGA).

6.2)   The "User Menu" screen will display

6.3)   In the middle section titled "Grant Application" select the link, "Start a New Application."

6.4)   In the next screen that pops up, your agency name will automatically populate in the "Agency" field boxes.

6.5)   In the Grant Program field box, select the look-up box and select the grant you wish to apply for. Do this by clicking in the small box to the left of the appropriate grant.

6.6)   For the QZ Prevention grant, you will now see a screen with a project title box. In the "Project Title" box enter your project title. Click the OK button at the bottom right. You will receive a pop up that says, "Records were Successfully Added."

6.7)   Click on the OLGA Menu link at the bottom of the page. At the OLGA Menu page, select the link, "Enter Grant Application."

6.8)   On the next screen that pops up, select the hyperlink of the grant you wish to access and it will open in edit mode for you to begin entering grant information.

6.9)   OLGA will open the **General tab.** Before proceeding further, click on the Eligibility tab and complete Page #1 "Applicant Questionnaire" FIRST, identify your reservoir(s) and then--using the scroll bar on the right--lower to the bottom section of the page and answer the three qualifying questions. If you answer "No" to any of these questions, you will not be allowed to continue the application process. If eligible,

click the SAVE →button to move to the next screen. Return to the General tab and work through the grant application in order of the tabs presented.

6.10) **General Tab: Applicant Information Page 1**: If any changes need to be made, do them here and click the SAVE→ button to move to the next page. If no changes, use the right arrow next to the Show Tree button to move to the next page.

6.11) **General Tab: Applicant Information Page 2**: Answer all questions and upload documents by clicking the blue arrows. In the pop-up window, click on "Browse" and select your document to upload. Once located, click OPEN at the bottom right of the window, then click SAVE (bottom right) and your document will populate into OLGA. Complete the remaining questions, use the scrollbar to the right to move down within the page and click the SAVE → button when finished.

6.12) **General Tab: Project Information Page 1:** In line e, enter the Amount of Funds Requested and complete the Project Cost in full dollar amounts with decimals (ex: $5000.00). Do not change any other information on this page. Click the SAVE → button to move forward.

6.13) **General Tab: Project Information Page 2**: Check your selections, and use the scroll bar on the right to move down this page. Enter name of reservoir(s) and a brief project description. Click the SAVE→ button to move forward.

6.14) **General Tab: Contacts**: Complete this first Contacts page with your information. IMPORTANT: In the "Contact Type" field, click the look up box and check "Project Administrator." This assigns you the level of the Project Administrator (PA) for this grant application. In the EGRAMS login field, click the lookup button, select your name, your information will populate. Once completed, click the SAVE → button and a blank Contacts page will appear. Add additional users on the blank Contacts pages provided, indicating them as "Authorized Representatives (AUT)" unless you are assigning one other person as a PA (max two PA's for each agency). Each user will need to have their User Profile completed first before being added as a contact. When finished with each page, click SAVE →. At the final contact, complete the info, click SAVE →., and then click the right arrow next to the SHOW TREE to move out of the Contacts section. Click on "Validate" button to check for errors.

6.15) **Eligibility Tab: Applicant Questionnaire:** This page was completed in Step 6.9. Click the right arrow next to the Show Tree button to move forward to the next page in this tab. Provide answers to the questions provided and click SAVE ☐ to move forward. Validate the eligibility tab before moving forward.

6.16) **Eligibility Tab: Evidence to support the un-infestation determination:** Upload your required document(s) by clicking on the browse button located on the right side of the page. Locate your document, upload, and then click "SAVE ☐" to move forw

6.17) **District and County Tab: CA Districts Pages 1-5:** Select your Senate District(s). If not known, use the URL address on this page to determine your district. Click ==SAVE →== and answer the information requested on the following pages in this tab. Instructions are provided on each page. 6.1)

6.18) **Narrative Tab: Narrative Instructions:** This is an information page only, read before proceeding. Click the right arrow next to the Show Tree to move to the next page.

6.19) **Narrative Tab: Project Description Narrative:** Follow the instructions provided. Upload your required document(s) by clicking on the browse button located on the right side of the page. Locate your document, upload, and then click "==SAVE →==" to move forward.

6.20) **Narrative Tab: Scope of Work:** Follow the instructions on the page. Once completed click "==SAVE →==" to move forward.

6.21) **Narrative Tab: Environmental Checklist:** Complete page as instructed and upload documents as needed. Click "==SAVE →==" to move forward.

6.22) **Task Budget: Task and Budget:** This page requires information of your estimated program costs. Use the scroll bar to complete all tables. Additional pages are available to align with each task in the Scope of Work. Validate this section before moving to the next tab. Click "==SAVE →==" to move forward.

6.23) **Line Item Budget: Budget Detail:** Complete the information per the instructions. Use the lookup button in the "Personnel Description" column to select the type of personnel that will be funded in this project and complete the table as required. Each row in the table provided allows for additional information in the Notes column. Each page is structured similarly in this tab. Complete all pages as required using the "==SAVE →==" to move forward on each page. Click the Validate button at the end of this tab.

6.24) **Other Information Tab: Page 1: Permits and Approvals required for the project:** Please provide applicable permits or documentation. Work through this tab answering the information or providing documents as requested. Use the scroll bar when available on various pages. Click "==SAVE →==" to move forward.

6.25) **Certifications Tab: Applicant Acknowledgement and Signature:** This is the final page in the application. To complete this page, check the box, and type your name, title, and date below. THIS IS NOT THE SUBMISSION PAGE. When complete click on either "SAVE" button, then click on the "validate" button. Fix any errors if presented. Click on the OLGA Menu link at the bottom of the page to return to the menu.

**STEP 7: ENTER A GRANT APPLICATION (to access an existing application)**

7.1) **If logged out**, log in to OLGA; the Welcome page will acknowledge you; if already logged in, proceed:

7.2) Click the OLGA Menu link at the bottom of the OLGA page

7.3) Select the link "Enter Grant Application." On the page that pops up, click on the hyperlink of the application you wish to edit and it will open. You are now in edit mode and may begin entering/editing information. Remember to SAVE your work. Click on the Logout link at the top right of the page to logout.

STEP 8: ASSIGN AGENCY USERS

OLGA allows your agency to have multiple users working on your application. It requires the PA with an 'active' status to assign levels of access of other OLGA users within your agency. Currently, each agency may have a maximum of two Project Administrators (PA). **Only PAs have authorization to submit a grant and assign levels of access of other OLGA users.**

All users must have their User Profile completed and be listed in the Contacts section of the grant application before they can be assigned access.

8.1) If not already logged in, the PA must login to OLGA from the OLGA Home screen.

8.2) Select "OLGA Menu" in the footer of the Welcome screen.

8.3) The User Menu will display. Click the link "Assign Agency Users"

8.4) Click in the "Grant Program" look-up box

8.5) Select the grant you wish to work in by clicking in the small box next to the name. Click on the "Find" button on the bottom of the page (#1 in screen shot, next page).

8.6) Click on the "Assign" button to locate users (#2 screen shot, next page). If names do not populate, they have either 1) not created their User Profile, 2) may have the wrong agency registered in their profile, or 3) you did not add them as a Contact in the General tab of the application.
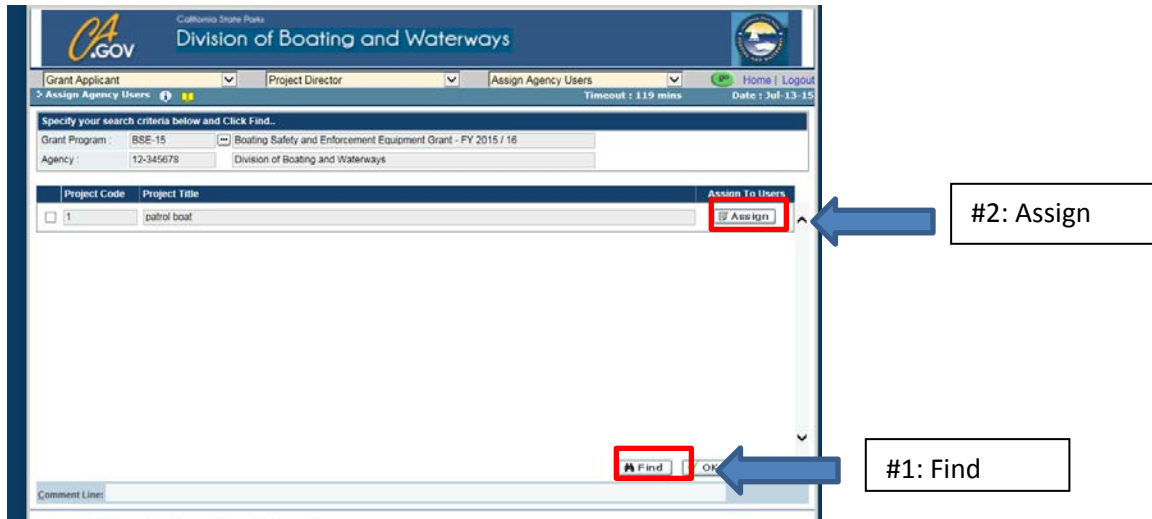
8.7) In the next screen, for each user, click the look-up box in the "Perm CD" category button and assign a title to the user(s) (see below).
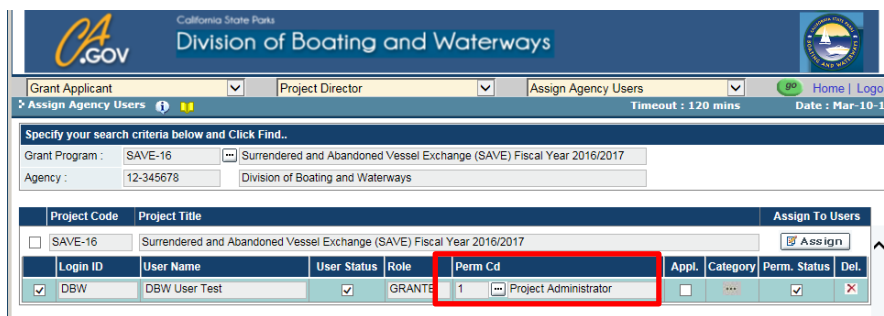
8.8) In the "Appl" box (for "applicability"): leave this box <u>unchecked</u> if you wish to give the user <u>unlimited</u> access. Check the box if you wish to assign specific access.

8.9) In the "Category" box, click on this look-up box to assign user access to specific sections of the grant application, such as Read Only, Write Only or No Access (NA). The default for all is "No Access." Make your access choices and click OK at the bottom of the pop up window.

8.10) Repeat Steps 5-9 for each user.

8.11) If you need to delete a user, the PA can click on the red "X" in the "Del" (for delete) column, and click on OK at the bottom of the page.

8.12) Click OK at the bottom of the screen to complete this section.

## STEP 9: VALIDATE THE APPLICATION: CHECK FOR ERRORS

Before an application can be submitted to DBW, it must be free of errors. The "Validate" button allows the user to check for errors and correct the information. It is necessary to click the Validate button in each tab section of the application for all errors to populate. Validation may be done during the initial creation of the application by clicking on the button at the **end** of each tab section, or when the application has been completed.

9.1) If user is active in the application, click on the index tab at the top left of the application. If not in the application, click the OLGA Menu link at the bottom of the page. Clock on "Enter Grant Application" and select the grant desired from the hyperlink that appears. Click on the "Index" tab at the top left of the application.

9.2) In the Index tab, In the Errors column, click on the error icon. Use the scroll bar to the right to check for other errors in this column. If no errors show, click on the "Validate" button in each tab in the application to confirm no errors. Return to the Index tab after doing this step and check for any errors that may have populated.

9.3) When clicking on an error icon, a popup window will appear identifying the errors. **Read the error message first**, and then click in the small box to access. Complete the missing information. **IMPORTANT: AFTER CORRECTING, CLICK ON THE (first) SAVE BUTTON AND THEN CLICK ON THE VALIDATE BUTTON TO UPDATE!** Click on the Index tab; the error message should be gone. If not, return to the tabs and recheck the information you entered, THEN CLICK ON THE (first) SAVE BUTTON AND VALIDATE BUTTON and return to the Index page. Complete the remaining errors. If all errors are resolved, you are ready to submit your application to DBW.

**STEP 10: SAVE PDF, REVIEW, PRINT, and/or EMAIL**

The "Grant Application Preview" link in the OLGA Menu allows the PA to review, print, validate and submit the application (errors on this page are **read only**; user must be in the "Enter Grant Application" mode to edit errors).

10.1) Login (if logged out) and from the Welcome screen select the OLGA Menu link. If logged in, select OLGA Menu link at the footer of the page.

10.2) Click on the "Grant Application Preview" link.

10.3) Click on the grant hyperlink to review.

10.4) User will now be in the Face Sheet Review page. Locate the two printer icons (see screenshot). The icon on the left opens only the application; the one on the right opens the application AND any documents uploaded to the application.
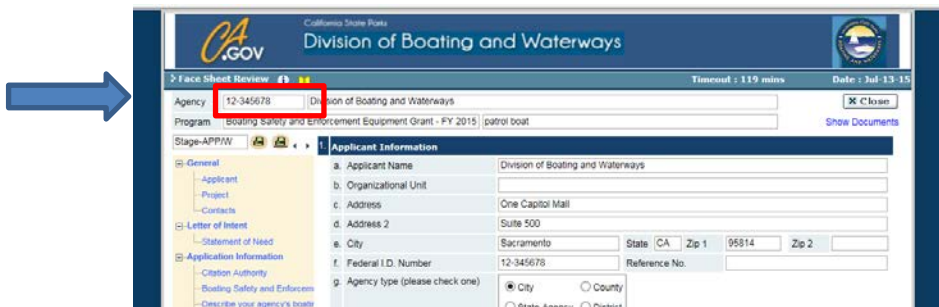
10.5) To save a copy, review, print or email, click on either print icon to open the application as a PDF in Adobe Acrobat.

When opened, the Adobe Acrobat icon tool bar provides options to save a copy to your computer (do this NOW), print, email, view attachments, etc. If you are unfamiliar with Adobe Acrobat, hover your cursor over the icon tool bar located beneath the menu bar (see below) and you will see description fields appear for each icon. These icons allow you to save an electronic copy, print a hard copy or email the application as a PDF.
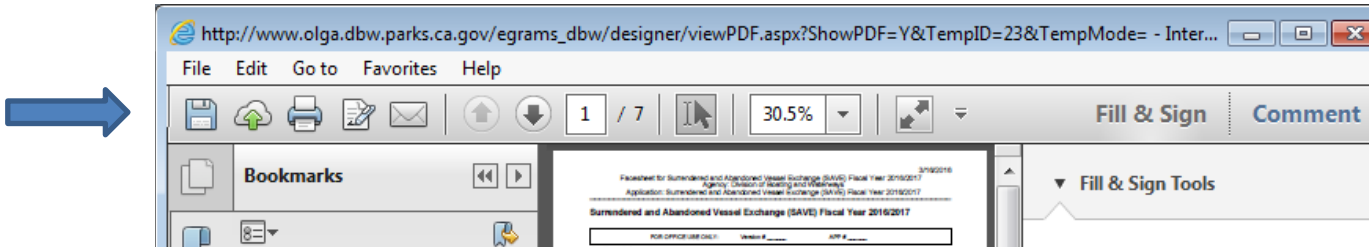
When finished with the PDF, close the window by clicking on the red "X" and you will be returned to the Face Sheet Review page in OLGA. You may now double check your application for errors by clicking on the "Validate" button on the bottom right, or you may submit your application to DBW.

Important: OLGA will not allow the user to submit the application without removing errors. Errors identified here are read-only; user must be in "Enter Grant Application" mode (thru the OLGA Menu link) to resolve errors.

Do not rely on OLGA to validate all errors. It is suggested that you print out a PDF of your application and read it thoroughly for clarity and correctness. Once the application is submitted to DBW, it cannot be recalled or returned to you.

When user has finished reviewing or performing other activities in this mode, the application may be submitted (see Step 11), or user may click the Close button at the top right of this Adobe Acrobat screen to return to the OLGA Preview page, then click the CLOSE button at the top right to return to work in another grant application. Or, to logout, click the OLGA Menu link, click Home / Logout at the top right and close the window.

STEP 11: SUBMIT YOUR APPLICATION
When the final steps in Step 10 have been completed, the PA may now submit the application if ready; otherwise, return to the OLGA Menu and click the link, "Enter Grant Application" to edit the app, or you may log out OLGA.

Continued next page.
To access the "Submit" button:

11.1)   **If still in the Face Sheet Review page**, and if there are no errors, click the Submit button at the bottom right of the page. Your application will now be submitted to DBW.

If active elsewhere in the application, click on the OLGA menu link at the footer of the page. Click on the "Grant Application Preview" link, then click on the grant hyperlink you wish to submit. User will now be in the Face Sheet Review page. Click on the "Submit" button at the bottom right.

If not logged in, login and from the Welcome screen select the OLGA Menu link at the foot of the page. Click on the "Grant Application Preview" link. Click on the grant hyperlink you wish to submit. User will now be in the Face Sheet Review page. Click on the "Submit" button at the bottom right.

11.2) Once the application is submitted, OLGA will acknowledge the submission and will issue a confirmation email to the Project Administrator. OLGA will also issue a notice to the DBW program administrator that the grant has been submitted.

STEP 12: CHECK EMAIL AND GRANT STATUS

OLGA provides an email log of correspondence generated between your agency and DBW. OLGA also allows you to monitor the status of the grant after submission to DBW.

12.1) Login
12.2) From the Welcome screen, select OLGA Menu.
12.3) Select the "Email Log" or "Application Status" link.
12.4) Select the application (or project) to view.
12.5) Click "Find" at the bottom of the page.

Any updates will be posted here; however, if an email is issued to the agency from DBW via OLGA, a separate email will appear in the PA's inbox.

More directions for OLGA processes will be provided if your agency receives an award.

STEP 13: COPY PREVIOUS YEAR'S APPLICATION

13.1) Login
13.2) From the Welcome screen, select the OLGA Menu link at the center bottom of the page.
13.3) In the Grant Application section, select the "Start a New Application" link.
13.4) Click the Grant Program lookup box and select the appropriate grant type for the **new fiscal year.**
13.5) The next page will appear and the "ADD" box will be selected by default.
13.6) Click OK in the lower right of the page.
13.7) Select the OLGA Menu link (again).
13.8) In the Grant Application section, select the "Enter Grant Application" link.
13.9) Click the blue hyperlink of the new application to open it.
13.10) Click OK in the deadline reminder pop up window.
13.11) The new application will open in the "General" tab (see circled area in the screenshot below).

13.12) Click the COPY button (circled below) to copy the previous year's information for this tab. The Copy button only copies information for the specific tab you are in-- not the entire application.
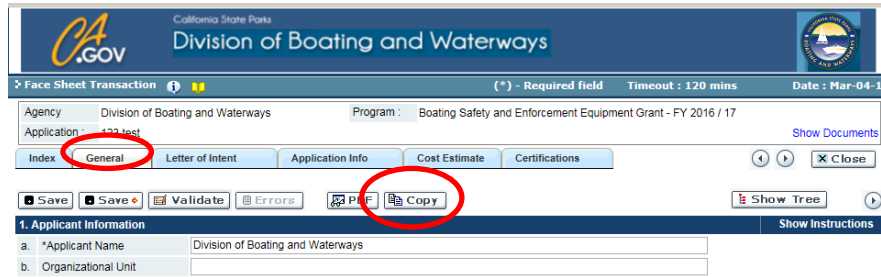
13.13) In the pop up window that appears, click the lookup box in the "From Application" box and select your choice from the previous year.

13.14) Click OK in the pop up boxes that appear. User will be returned to the General tab.

13.15) **IMPORTANT:** To view the copied information, click on another tab and then click back to the General tab--this allows the text from the previous year's app to be populated.

13.16) Review the agency's info; make changes here if necessary. If making edits to any copied pages in the new application, click the SAVE → button to save the changes and move forward to the next page.

If no edits to the first page, click the right arrow next to the SHOW TREE box to move to page 2 in the General tab.

13.17) General tab, Page 2, Project Information:
In the Amount of Funds Requested box, (**#e)**: To change the grant amount request from a previous application, enter the new amount in the first box, and the grant amount (**plus 10% for SAVE grants**) in the Project Cost box. Click the SAVE → button to save your changes and to move forward.

If no changes to this page, click the right arrow to move to the next page.

13.18) General tab, Page 3, Contacts:
All contacts from the previous year will be copied and listed on separate Contacts pages. Use the right arrow next to the SHOW TREE button to move through the pages of users. To remove users no longer authorized, click the DELETE button at the bottom right of the page where their name and information is listed.
If adding new users, do so on the blank Contacts page provided by clicking on the right arrow next to the SHOW TREE button until a blank Contacts page appears. All users will need to have their personal profile completed first before being added.

When finished adding new users, click the SAVE button, then click the VALIDATE button to check for any errors. It is suggested that the user validates each section before moving to a new tab (on the last page of each section), or complete the application through the Certification page, and then click through each tab and validate then. For more on validating, please refer to Step 9.

Although previous users will be copied from last year's application, their permission levels will not. It is imperative that you assign each user their OLGA access levels to all access, read/write only, or no access. You may do this now, or continue to work through the rest of the application and set user access levels after Step 13.21 (below). To assign user access levels, refer to Step 8: Assign Agency Users.

13.19) Letter of Intent tab: Click the "Copy" button and view the copied information by clicking to another tab and then clicking back to the Letter of Intent Tab.

13.20) Make edits as needed; click the SAVE → button to save and move forward to each page in this section. If no edits, use the forward arrow to move to the next page(s). Make any changes, click the SAVE→ button and then click the VALIDATE button.

13.21) Continue to repeat these steps through each tab.

13.22) At the CERTIFICATION tab, complete this page, click SAVE and VALIDATE.

13.23) Click in the INDEX tab to view for errors. See Step 9. Once the errors are cleared, the application is completed.

13.24) Refer to Step 10 to save a PDF of your application, review, print and/or email.

13.25) Refer to Step 11 to submit the application(s).