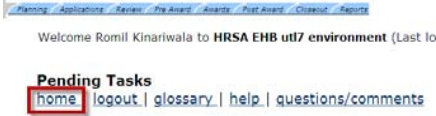
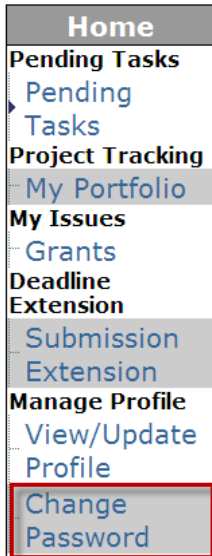
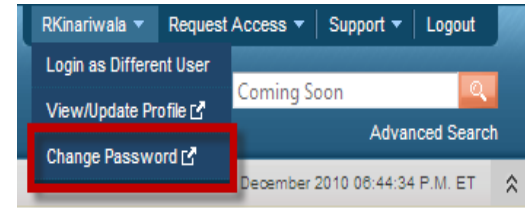


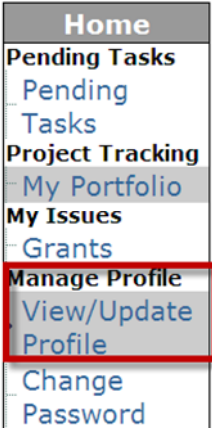
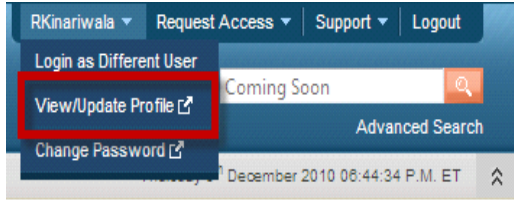
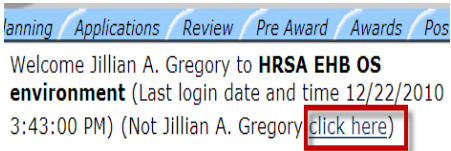
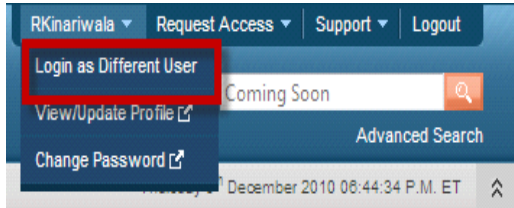
# HRSA Electronic Handbooks User Interface Crosswalk

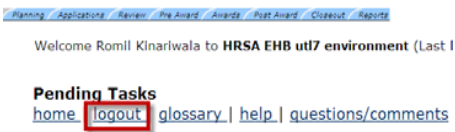
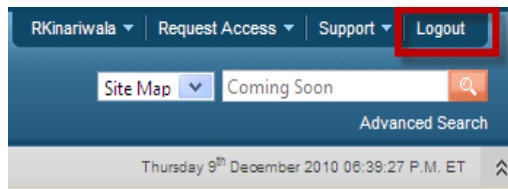
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## 1. Common Functions

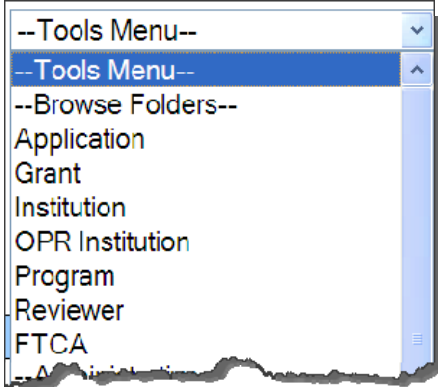
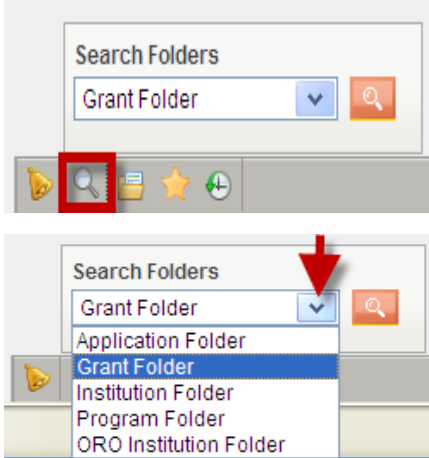
| Feature          | Old UI Steps                                                                                                                                                                                                           | New UI Steps                                                                                                                                                                                                                                                      |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Access Home page | <ol style="list-style-type: none"> <li>Click <b>home</b> link under the page title.  </li> </ol>                                     | <ol style="list-style-type: none"> <li>Click <b>home</b> icon tab in top main navigation tabs.  </li> </ol>                                                                    |
| Change Password  | <ol style="list-style-type: none"> <li>Click <b>Change Password</b> link in left hand side menu under "Manage Profile".  </li> </ol> | <ol style="list-style-type: none"> <li>Move the cursor over your <b>username</b> in top right hand corner toolbar.  </li> <li>Select <b>Change Password</b> option.</li> </ol> |

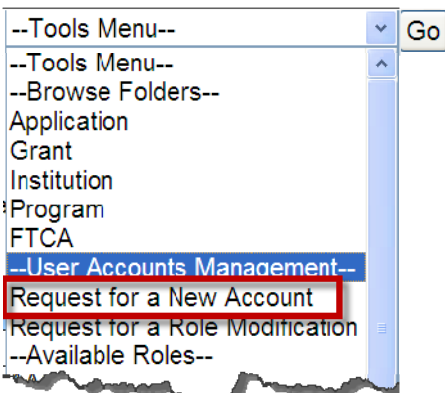
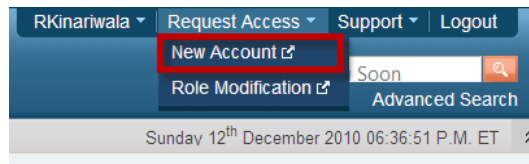
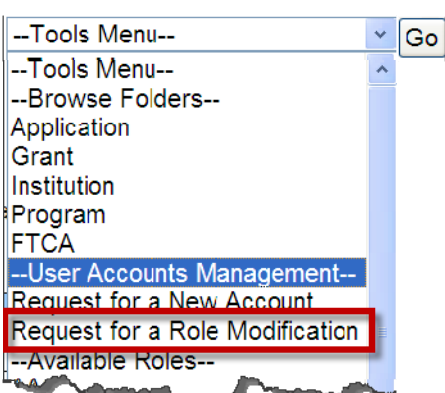
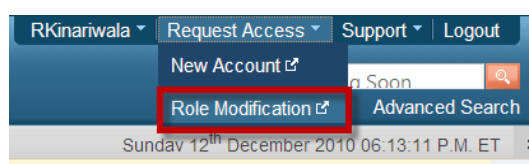
| Feature                 | Old UI Steps                                                                                                                                                                                            | New UI Steps                                                                                                                                                                                                                      |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View/Update Profile     | <p>1. Click <b>View/Update Profile</b> link in left hand side menu under "Manage Profile".</p>                         | <p>1. Move the cursor over your <b>username</b> in top right hand corner toolbar.</p> <p>2. Select <b>View/Update Profile</b> option.</p>      |
| Login as different user | <p>1. Click <b>Click Here</b> link at the top, besides the displayed name, next to the last login date and time.</p>  | <p>1. Move the cursor over your <b>username</b> in top right hand corner toolbar.</p> <p>2. Select <b>Login as Different User</b> option.</p>  |

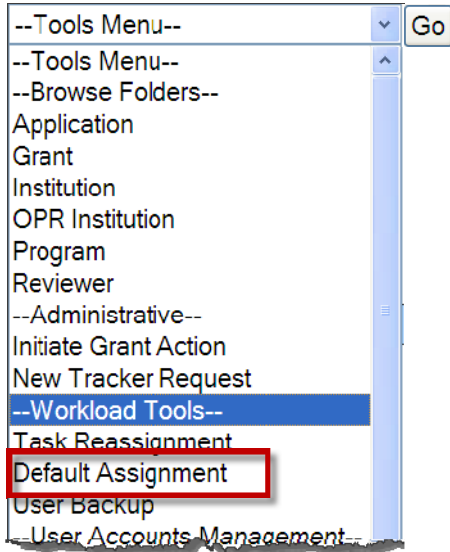
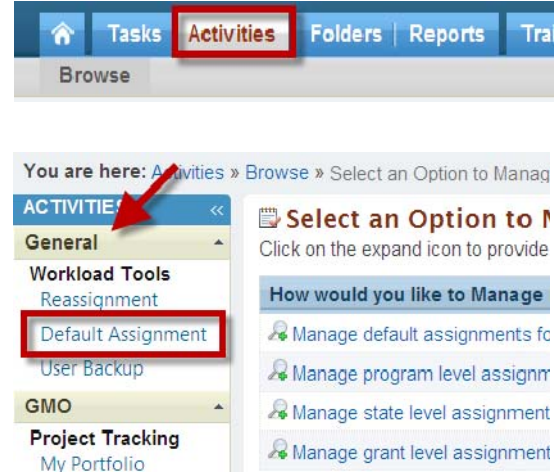
| Feature | Old UI Steps                                                                                                                                | New UI Steps                                                                                                                                             |
|---------|---------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Logout  | <p>1. Click <b>logout</b> link under the page title.</p>  | <p>1. Click <b>Logout</b> link in top right hand corner toolbar.</p>  |

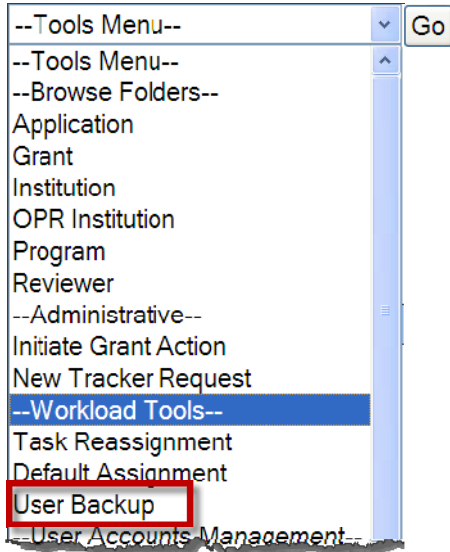
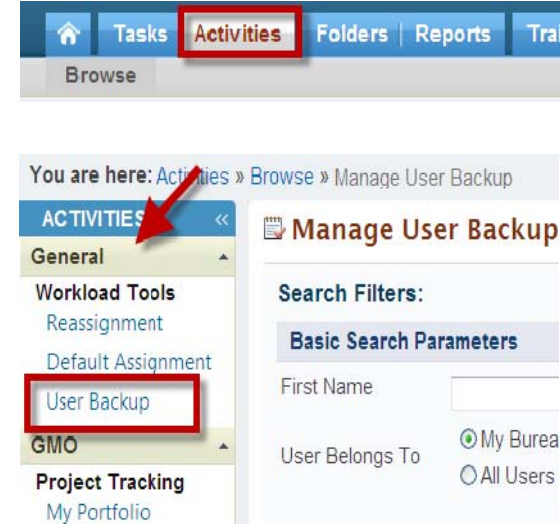
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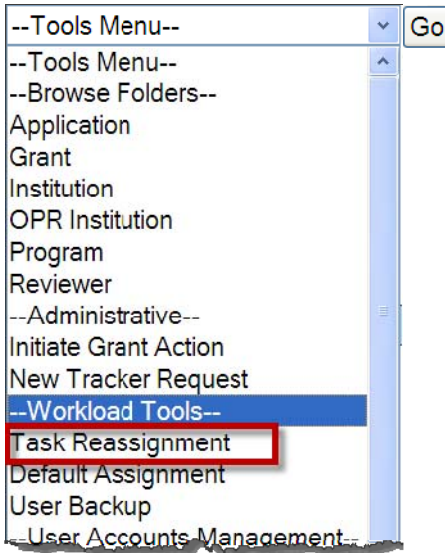
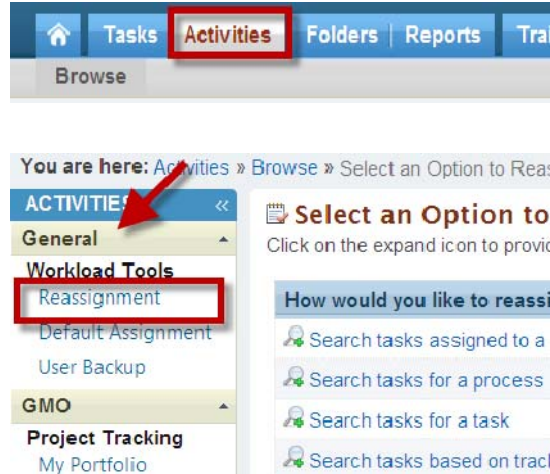
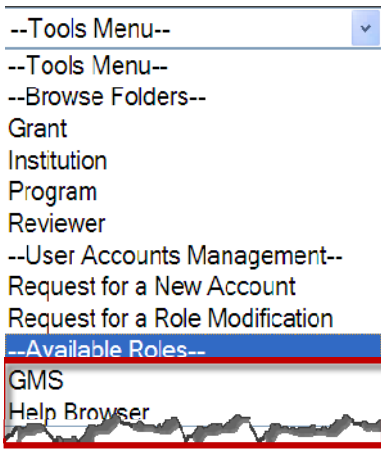
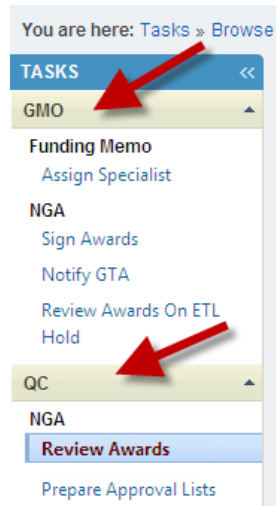
## 2. Tools

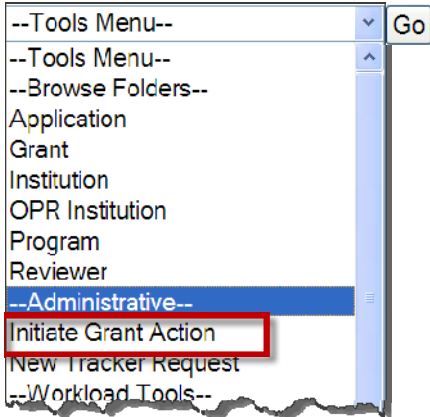
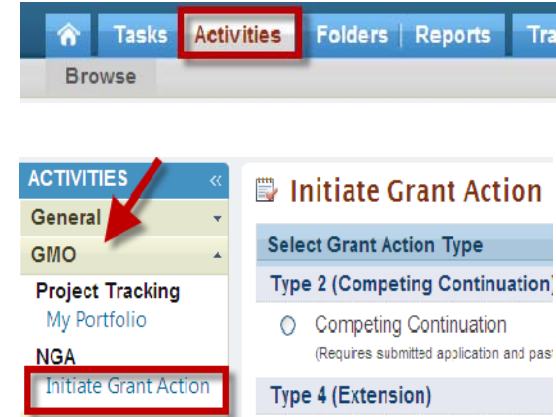
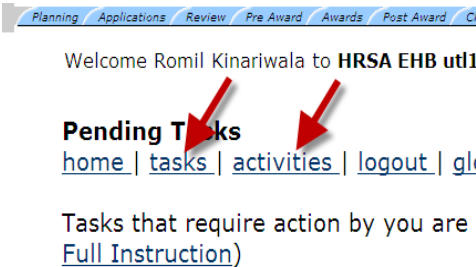
| Feature        | Old UI Steps                                                                                                                                                                                                                                                 | New UI Steps                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Browse Folders | <ol style="list-style-type: none"> <li>Click <b>Tools Menu</b> in top right hand corner.</li> <li>Select respective folder from drop down and click <b>GO</b>.</li> </ol>  | <ol style="list-style-type: none"> <li>Click <b>Search</b> icon in bottom toolbar.</li> <li>Select respective folder from drop down and search.</li> </ol>  <p>OR</p> <ol style="list-style-type: none"> <li>Click <b>Folders</b> tab.</li> <li>Click respective View link for a folder.</li> </ol>  |

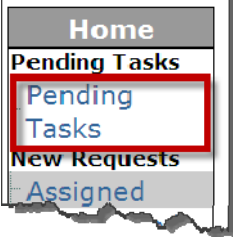
| Feature                   | Old UI Steps                                                                                                                                                                                                                                                                                               | New UI Steps                                                                                                                                                                                                                                                        |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Request New Account       | <ol style="list-style-type: none"> <li>Click <b>Tools Menu</b> in top right hand corner.</li> <li>Select <b>Request for a New Account</b> option under "User Accounts Management" and click <b>GO</b>.</li> </ol>        | <ol style="list-style-type: none"> <li>Move the cursor over <b>Request Access</b> in top right hand corner toolbar.</li> <li>Select <b>New Account</b> option.</li> </ol>        |
| Request Role Modification | <ol style="list-style-type: none"> <li>Click <b>Tools Menu</b> in top right hand corner</li> <li>Select <b>Request for a Role Modification</b> option under "User Accounts Management" and click <b>GO</b>.</li> </ol>  | <ol style="list-style-type: none"> <li>Move the cursor over <b>Request Access</b> in top right hand corner toolbar.</li> <li>Select <b>Role Modification</b> option.</li> </ol>  |

| Feature                    | Old UI Steps                                                                                                                                                                                                                                                                       | New UI Steps                                                                                                                                                                                                                                                                                                                                               |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Manage Default Assignments | <ol style="list-style-type: none"> <li>Click <b>Tools Menu</b> in top right hand corner</li> <li>Select <b>Default Assignments</b> option under "Workload Tools" and click <b>GO</b></li> </ol>  | <ol style="list-style-type: none"> <li>Click <b>Activities</b> tab.</li> <li>In left hand side menu, click the <b>General</b> role to expand the menu options.</li> <li>Click <b>Default Assignment</b> link under "Workload Tools" in left hand side menu.</li> </ol>  |

| Feature            | Old UI Steps                                                                                                                                                                                                                                                               | New UI Steps                                                                                                                                                                                                                                                                                                                                        |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Manage User Backup | <ol style="list-style-type: none"> <li>Click <b>Tools Menu</b> in top right hand corner</li> <li>Select <b>User Backup</b> option under "Workload Tools" and click <b>GO</b></li> </ol>  | <ol style="list-style-type: none"> <li>Click <b>Activities</b> tab.</li> <li>In left hand side menu, click the <b>General</b> role to expand the menu options.</li> <li>Click <b>User Backup</b> link under "Workload Tools" in left hand side menu.</li> </ol>  |

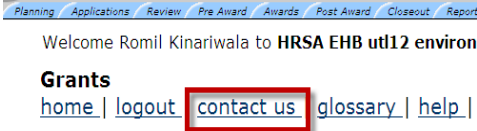
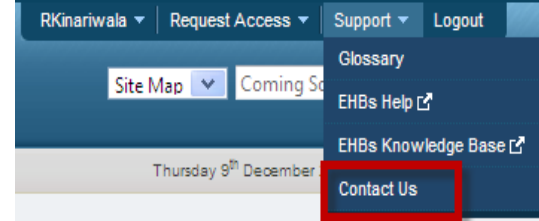
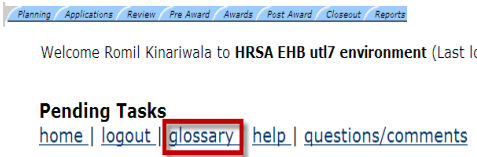
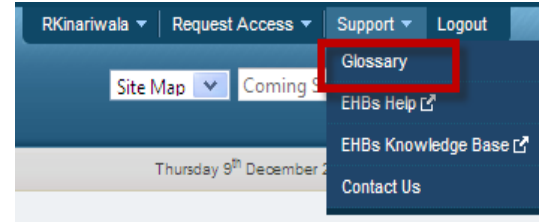
| Feature        | Old UI Steps                                                                                                                                                                                                                                                                     | New UI Steps                                                                                                                                                                                                                                                                                                                                         |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reassign Tasks | <ol style="list-style-type: none"> <li>Click <b>Tools Menu</b> in top right hand corner</li> <li>Select <b>Task Reassignment</b> option under "Workload Tools" and click <b>GO</b></li> </ol>  | <ol style="list-style-type: none"> <li>Click <b>Activities</b> tab.</li> <li>In left hand side menu, click the <b>General</b> role to expand the menu options.</li> <li>Click <b>Reassignment</b> link under "Workload Tools" in left hand side menu.</li> </ol>  |
| Switch Role    | <ol style="list-style-type: none"> <li>Click <b>Tools Menu</b> in top right hand corner.</li> <li>Select respective role under "Available Roles" and click <b>GO</b>.</li> </ol>              | <ol style="list-style-type: none"> <li>Switch role is not necessary in new UI. All tasks across all your roles are displayed grouped by role (e.g. GMO, QC) and then by document (e.g. Funding Memo, NGA).</li> </ol>                                            |

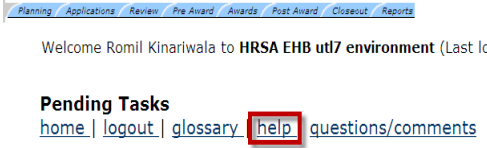
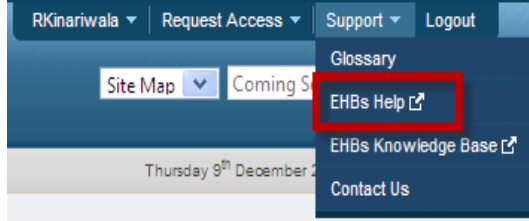
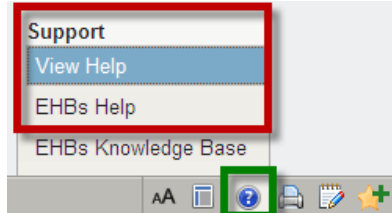
| Feature               | Old UI Steps                                                                                                                                                                                                                                                                                                                                                             | New UI Steps                                                                                                                                                                                                                                                                                                                 |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Initiate Grant Action | <ol style="list-style-type: none"> <li>Click <b>Tools Menu</b> in top right hand corner.</li> <li>Select <b>Initiate Grant Action</b> option under "Administrative" and click <b>GO</b>.</li> </ol>                                                                                    | <ol style="list-style-type: none"> <li>Click <b>Activities</b> tab.</li> <li>In left hand side menu, click your role to expand the menu.</li> <li>Click <b>Initiate Grant Action</b> link under "NGA" in left hand side menu.</li> </ol>  |
| Switch between UIs    | <ol style="list-style-type: none"> <li>Under the title of each screen, click <b>tasks</b> link to view your pending tasks in new UI.</li> <li>Under the title of each screen, click <b>activities</b> link to view your work that does not have a pending task in new UI.</li> </ol>  | <ol style="list-style-type: none"> <li>Above the main navigation tabs, click <b>Switch to Classic</b> link.</li> </ol>                                                                                                                   |

| Feature              | Old UI Steps                                                                                                                                                                                                                                                                                                                     | New UI Steps                                                                                                          |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| Access Pending Tasks | <p>1. Click <b>Pending Tasks</b> link in left side menu under "Home"</p>  <p>OR</p> <p>1. Click the <b>E-Handbook Home</b> link in top left hand corner.</p>  | <p>1. Click <b>Tasks</b> tab.</p>  |

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### 3. Help/Support

| Feature           | Old UI Steps                                                                                                                                     | New UI Steps                                                                                                                                                                                                   |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Contact Help Desk | <p>1. Click <b>Contact Us</b> link under the page title.”</p>  | <p>1. Move the cursor over <b>Support</b> in top right hand corner toolbar.</p> <p>2. Select <b>Contact Us</b> option.</p>  |
| Glossary          | <p>1. Click <b>Glossary</b> link under the page title.”</p>    | <p>1. Move the cursor over <b>Support</b> in top right hand corner toolbar.</p> <p>2. Select <b>Glossary</b> option.</p>    |

| Feature | Old UI Steps                                                                                                                               | New UI Steps                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------|--------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Help    | <p>1. Click <b>Help</b> link under the page title.”</p>  | <p>1. Move the cursor over <b>Support</b> in top right hand corner toolbar.</p> <p>2. Select <b>EHBs Help</b> option.</p>  <p><b>OR</b></p> <p>1. Click the <b>Help</b> icon in bottom right hand corner toolbar.</p> <p>2. Select <b>View Help</b> option to open context sensitive help.</p>  <p>3. Select <b>EHBs Help</b> option to open EHBs help.</p> |

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#### 4. Role Matrix

Work that can be performed in the new user interface is displayed below grouped by role. To view work for other roles not included here, please access the classic user interface.

| Role | Tab | Task/Functionality |
|------|-----|--------------------|
|------|-----|--------------------|

| Role | Tab        | Task/Functionality                       |
|------|------------|------------------------------------------|
| FMO  | Tasks      | Sign Approval List                       |
| GA   | Activities | Setup CRS-EIN/Update CRS-EIN             |
| GMO  | Tasks      | Review Funding Memo                      |
|      | Tasks      | Prepare Batch Awards                     |
|      | Tasks      | Assign Specialist                        |
|      | Tasks      | Sign Awards                              |
|      | Tasks      | Notify CLO                               |
|      | Tasks      | Review Awards on ETL Hold                |
|      | Tasks      | Review Awards on Release Hold            |
|      | Activities | Initiate Grant Action                    |
| GMS  | Tasks      | Supplementary FM Review                  |
|      | Tasks      | Review Assignments                       |
|      | Tasks      | Prepare New Awards/Request Change Awards |
|      | Activities | Initiate Grant Action                    |
| GTA  | Tasks      | Notify Awardees                          |
| QC   | Tasks      | Review Awards                            |
|      | Tasks      | Prepare Approval List                    |
|      | Activities | Initiate Grant Action                    |

| Role    | Tab        | Task/Functionality |
|---------|------------|--------------------|
| General | Activities | Task Reassignment  |
|         | Activities | Default Assignment |
|         | Activities | User Backup        |

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