HRSA Electronic Handbooks User Interface Crosswalk



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FM0	
GA	
GMO	
GMS	
GTA	
QC	
GENERAL	

1. Common Functions

Feature	Old UI Steps	New UI Steps
Access Home page	1. Click home link under the page title. Pending Tasks home logout glossary help guestions/comments	1. Click home icon tab in top main navigation tabs.
Change Password	1. Click Change Password link in left hand side menu under "Manage Profile". Pending Tasks Pending Tasks Project Tracking My Portfolio My Issues Grants Deadline Extension Submission Extension Manage Profile View/Update Profile	 Move the cursor over your username in top right hand corner toolbar. Select Change Password C Coming Soon Advanced Search Change Password option.



Feature	Old UI Steps	New UI Steps
View/Update Profile	1. Click View/Update Profile link in left hand side menu under "Manage Profile". Pending Tasks Pending Tasks Project Tracking - My Portfolio My Issues - Grants Manage Profile View/Update Profile Change Password	 Move the cursor over your username in top right hand corner toolbar. Select View/Update Profile option.
Login as different user	1. Click Click Here link at the top, besides the displayed name, next to the last login date and time. Anning Applications Review Pre Award Awards Pos Welcome Jillian A. Gregory to HRSA EHB OS environment (Last login date and time 12/22/2010 3:43:00 PM) (Not Jillian A. Gregory Click here)	 Move the cursor over your username in top right hand corner toolbar. Select Login as Different User option.



Feature	Old UI Steps	New UI Steps
Logout	1. Click logout link under the page title. Pending Tasks home logout glossary help questions/comments	1. Click Logout link in top right hand corner toolbar. RKinariwala ▼ Request Access ▼ Support ▼ Logout Site Map ▼ Coming Soon Q Advanced Search Thursday 9 th December 2010 08:39:27 P.M. ET
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2. Tools





Feature	Old UI Steps	New UI Steps
Request New Account	 Click Tools Menu in top right hand corner. Select Request for a New Account option under "User Accounts Management" and click GO. Click Tools Menu Tools Menu Browse Folders Application Grant Institution Program FTCA User Accounts Management Request for a New Account Request fo	 Move the cursor over Request Access in top right hand corner toolbar. Select New Account option.
Request Role Modification	 Click Tools Menu in top right hand corner Select Request for a Role Modification option under "User Accounts Management" and click GO. Tools Menu Browse Folders Application Grant Institution Program FTCA Tools Menu Browse Folders Application Grant Institution Program FTCA User Accounts Management Request for a New Account Request for a Role Modification Available Roles 	 Move the cursor over Request Access v Support v Logout New Account of Access in top right hand corner toolbar. Select Role Modification option.



Feature		Old UI Steps			New UI Steps	
Manage Default Assignments	 Click Tools Menu in top right hand corner Select Default Assignments option under "Workload Tools" and click GO 	Tools Menu Tools Menu Browse Folders Application Grant Institution OPR Institution Program Reviewer Administrative Initiate Grant Action New Tracker Request Workload Tools Task Reassignment Default Assignment User Backup User Accounts Management	Go	 Click Activities tab. In left hand side menu, click the General role to expand the menu options. Click Default Assignment link under "Workload Tools" in left hand side menu. 	Tasks Activities Browse Activities ** You are here: A tivities ** ACTIVITIE ACTIVITIE ** General * Workload Tools Reassignment Default Assignment User Backup GMO * Project Tracking My Portfolio	Enders Reports Trade Browse > Select an Option to Manage Select an Option to Manage Select an Option to P Click on the expand icon to provide How would you like to Manage Anage default assignments for A Manage program level assignment Manage state level assignment Anage grant level assignment Manage grant level assignment



Feature		Old UI Steps				New UI Steps		
Manage User Backup	 Click Tools Menu in top right hand corner Select User Backup option under "Workload Tools" and click GO 	Tools Menu Tools Menu Browse Folders Application Grant Institution OPR Institution Program Reviewer Administrative Initiate Grant Action New Tracker Request Workload Tools Task Reassignment Default Assignment User Backup User Accounts Management	Go	1. 2. 3.	Click Activities tab.	Tasks Activities Browse You are here: Activities >> ACTIVITIES General Workload Tools Reassignment Default Assignment User Backup GMO Project Tracking My Portfolio	ties Folders Re Browse » Manage Use Manage Use Search Filters: Basic Search Pa First Name User Belongs To	r Backup er Backup rameters



Feature	Old UI Steps	New UI Steps
Reassign Tasks	 Click Tools Menu in top right hand corner Select Task Reassignment option under "Workload Tools" and click GO Select Task Reassignment option under Workload Tools" and click GO Select Task Reassignment option under Select Task Reassignment option under Select Task Reassignment option under Select Task Reassignment OPR Institution OPR Institution Program Reviewer Administrative Initiate Grant Action New Tracker Request Workload Tools Task Reassignment Default Assignment User Backup User Accounts Management 	 Click Activities tab. In left hand side menu, click the General role to expand the menu options. Click Reassignment link under "Workload Tools" in left hand side menu. You are here: Activities > Browse > Select an Option to Rea: ACTIVITIE General Vorkload Tools Reassignment User Backup My Portfolio Folders Reports Transport Select an Option to Rease Click on the expand icon to provid Search tasks assigned to a Search tasks for a process Search tasks for a task Search tasks for a task Search tasks based on tract
Switch Role	 Click Tools Menu in top right hand corner. Select respective role under "Available Roles" and click GO. Select respective role under "Available Roles" and click GO. Select respective role under "Available Reviewer User Accounts Management Request for a New Account Request for a Role Modification -Available Roles GMS Help Browser 	1. 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). You are here: Tasks » Browse TASKS GMO Funding Memo Assign Specialist NGA Review Awards On ETL Hold QC NGA Review Awards Prepare Approval Lists



Feature	Old UI Steps	New UI Steps
Initiate Grant Action	 Click Tools Menu in top right hand corner. Select Initiate Grant Action option under "Administrative" and click GO. Select Initiate Grant Action OPR Institution Program Reviewer Administrative	 Click Activities tab. In left hand side menu, click your role to expand the menu. Click Initiate Grant Action Inik under "NGA" in left hand side menu.
Switch between UIs	 Under the title of each screen, click tasks link to view your pending tasks in new UI. Under the title of each screen, click activities link to view your work that does not have a pending task in new UI. Pending T ks home tasks activities logout glk Tasks that require action by you are Full Instruction) 	1. Above the main navigation tabs, click Switch to Classic Ink. Switch to Classic link. Itasks Activities Folders Reports Training owse Itasks activities e here: Tasks & Browse & Tasks Summary Overview





3. Help/Support

Feature	Old UI Steps	New UI Steps
Contact Help Desk	1. Click Contact Us link under the page title." Planning Applications Review Pre Award Awards Post Award Closeout Report Welcome Romill Kinariwala to HRSA EHB util2 environ Grants home logout contact us glossary help	 Move the cursor over Support in top right hand corner toolbar. Select Contact Us option.
Glossary	1. Click Glossary link under the page title." Hending Tasks home logout glossary help questions/comments	 Move the cursor over Support in top right hand corner toolbar. Select Glossary option.



Feature	Old UI Steps	New UI Steps
Help	1. Click Help link under the page title." Pending Tasks home logout glossary help questions/comments	 Move the cursor over Support in top right hand corner toolbar. Select EHBs Help option. RKinariwala ▼ Request Access ▼ Support ▼ Logout Glossary Coming S EHBs Help C[*] EHBs Knowledge Base C[*] Contact Us
		 OR 1. Click the Help icon in bottom right hand corner toolbar. 2. Select View Help option to open context sensitive help. 3. Select EHBs Help option to open EHBs help.

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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
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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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