WebGrants Term	WebGrants Definition
Alert	An alert is an automated notification from WebGrants to a user. All alerts are sent to users via their personal email address. Alerts can also be viewed in the system in the alerts link in the People module. WebGrants contains over 70 different automated alerts that are sent out according to many different business rules. For example, when an application's due date is approaching, when a status report is due or when a claim has been paid. Clients can customize the text in each alert in the Alerts Management module in the Utilities module.
Amendment	A contract amendment is a grant sub-component that is used to initiate and approve a contract amendment process. An amendment can be started by either internal staff or by the grantee. Amendments can have a type, meaning that multiple different types of amendments can be used in the system. Each amendment type can have different forms. Examples of types include: duration extension request, budget modification, scope change and others. Clients can define a multilevel approval process of up to five approval levels. When an amendment is submitted staff can route the document through the approval levels and approve the amendment. It is possible to copy grant forms from the grant into the amendment. For example, the budget can be copied into the amendment where the grantee can modify the budget to show how they would like to change the values. The approved amendment will not automatically copy over the copied document; therefore, staff will need to edit the budget manually for example. The amendment has all the standard document functionality including negotiation, withdrawal, notes, feedback, mapping and versions.
Announcement	An announcement is text that is posted to the login page of the system. Clients can create new announcements in the announcements module under the utilities module.
Application	An application is a document in the WebGrants system. Applicants apply for a grant through a posted funding opportunity by starting, completing and submitting an application. The application is a user defined document. Client staff can define any number of application forms through the form creator tool. Specific business rules can be configured into each application form when adding fields to the forms using the form creator tool. These business rules include field order, labels and instructions, field data type, optional or required fields, conditional show/hide logic, conditional validation, conditional reject, mathematical calculations and other parameters. Forms are made up of sections, three possible sections exist: single value, multi-list and grid. The application has all the standard document functionality including negotiation, withdrawal, notes, feedback, mapping and versions.
Attachment	An attachment is an electronic file that is uploaded to the WebGrants system. Attachments are typically attached to documents in the system. Users can by default upload any document of any type and size. However, it is possible through system configuration to limit the type, size and number of attachments.
Claim	A claim is a grant sub-component that is used by the grantee to request grant money from the client. WebGrants supports two types of claims: payments and reimbursements. A payment is a scheduled disbursement that triggers without a request from the grantee, when a client sends money to a grantee on a schedule. For example, a client may award a grantee $12,000 and send the grantee automatically $1,000 per month for the next 12 months. The payment can also be used to send advance payments to the grantee, this can be a onetime advance or an ongoing advance. Reimbursements are payment requests submitted by the grantee after the grantee has incurred expenses on the grant. The reimbursement is based on the budget. The system will automatically copy the budget form into the reimbursement form. The grantee will then enter their expenses this period into the reimbursement. The system will enforce certain business rules such as the grantee cannot request more money than the grant total, or the grantee cannot request more money than is in a single budget line item, or the grantee can request more money than is in a single budget line item but only a certain percentage like 10%. The grantee can also report on matching amounts. Also, each individual budget line item can be expanded in a form called detail of expenditures. The claim is a document in the system and clients can add any number of additional forms to the claim document using the form creator tool. The claim has all the standard document functionality including negotiation, withdrawal, notes, feedback, mapping and versions.

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Contract	The contract is the agreement document between the client and the grantee. The contract is created and signed when a grantee is awarded a grant. A contract is functionality associated with a grant. Only after a grant is created can a contract be generated in the system. A contract can be a hard-coded PDF document or a set of exported fields. A PDF document can be generated from the system that is a complete contract document including the boilerplate text and dynamic variables that are pulled in from the system. A set of exported fields can also be implemented. These fields would then be used by the client to create the contract external to the system via an MS Word mail merge process.
Correspondence	The correspondence is a system grant component. It is a custom form that is divided into two sections: Non-System Communication Log and Inter-System Grantee Correspondence. The Non-System Communication Log is a repository of notes that internal staff can make on a grant to record important communication that has occurred outside of the system. This communication can be a phone call, an email, a fax, a letter or some other form of communication. Staff can record who the message was from/to, the subject and the message. Any number of these items can be added to a grant. The Inter-System Grantee Correspondence is a messaging tool that allows the client to send messages to the grantee and grantee to send messages to the client. These messages will result in an alert. A full history of all messages is retained in the system.
Dashboard	The dashboard is a module in the WebGrants system that displays important information for each user. Many sections make up the dashboard including approaching deadlines, which displays documents that has a deadline in the next 30 days. Document approval which displays all documents where the current user is next in the approval process. Recent negotiations which displays all recently negotiated documents. My site visits which displays the site visits assigned to the current user. A new user list which shows all newly registered users awaiting approval. Quick reports which shows a list of the user's favorite reports.
Document	A document is a collection of user defined forms in the system. Most documents share many similarities and functionality in the system. Examples of documents include Award, Application, Grant, Review, Status Report, Claim, Site Visit, Amendment, Funding Opportunity, Inventory, Potential Funding Opportunity, Internal Application and Internal Grant. People and organizations are quasi-documents in the system. Most documents have standard document functionality including negotiation, withdrawal, notes, feedback, mapping and versions.
Document Repository	The document repository is storehouse of uploaded documents in the system. Clients often have standard boilerplate documents that must be uploaded for funding opportunities and other documents. These files can be uploaded into the document repository and then attached to other documents from there, as opposed to maintaining and uploading these documents from each user's personal computers.
Drop Down List	A drop-down list is a user defined list of options that can be used on a user defined form. A drop-down list can be created using the drop-down list module in the utilities module. A drop-down list can be associated with one or more program areas. Each option in the list can have a code, a label, a value (used in calculations) and a program area. Options can also be archived. A single drop-down list can be created and saved once and reused any number of times on any number of forms.
Encumbrance	An encumbrance is a grant system component. An encumbrance is used to generate an alert to the grantee and also to stop payments to a grantee. The encumbrance marks a particular milestone, deliverable or task that a grantee must complete by a particular date or face some consequences. One consequence can be that the system will automatically prevent staff from paying any reimbursement request from the grantee until the encumbrance is lifted.

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Funding Opportunity	An alert is an automated notification from WebGrants to a user. All alerts are sent to users via their personal email address. Alerts can also be viewed in the system in the alerts link in the People module. WebGrants contains over 70 different automated alerts that are sent out according to many different business rules. For example, when an application's due date is approaching, when a status report is due or when a claim has been paid. Clients can customize the text in each alert in the Alerts Management module in the Utilities module.
Grant	A grant is a document in the WebGrants system. Grants are typically created by awarding an application. Data from an application will copy into the grant tracking module and create a grant. Grants can also be added directly to the system without an application. A grant consists of a collection of sub forms and documents. There are three types of forms: system forms, forms that are built into the WebGrants system, application forms, those portions of the application that are designated to copy automatically into the grant and user defined forms, forms that are created by the system administrator and included as part of the grant. Grants can also have sub documents which are document objects themselves, examples of this include status reports, claims, site visits and amendments. While the grant itself cannot be negotiated, individual components of the grant can be negotiated to the grantee. The grant has some of the standard document functionality including withdrawal, notes, and mapping.
Inventory	Inventory is a module in the WebGrants system that stores inventory items. An inventory item is a document object that consists of forms. The inventory module is an optional module and is not used by all clients. Different clients use the inventory module different ways. The main idea behind the inventory module is to allow clients to track items that can be associated with more than one grant. Data unique to the inventory item can be entered into user defined forms associated with the inventory document. Examples of uses for the inventory module include tracking equipment and supplies. Tracking large capital purchases like vehicles or expense equipment. Also, art organizations can use the module to keep track of art portfolios. Inventory has some of the standard document functionality including withdrawal, notes, and mapping.
Map	By default, WebGrants integrates with Google maps to produce maps. The system allows users to define certain fields in document objects as mapping fields. These fields can be either addresses or coordinates. Multiple fields can combine together to produce an address and at least two fields are required to produce a set of coordinates. Staff can also designate certain document information to appear in the pin drop on the map that marks the document location on the map. Any data from the document like the title, contract name, budget amount and other fields can be exported to the map. When the use clicks the pin drop on the map this data will appear. Users can map a single document or many documents together on a single map. Integration with other GIS tools such as ArcGIS and OpenGIS is also possible.
My Profile	My profile is a module in the WebGrants system that allows users to update their personal contact information. Not all users have access to the People and Organizations modules, therefore, if a user wants to change their contact information they can do so in the my profile module. Staff can change their personal information and their organization information. As a system setting, some clients can also allow grantees to add and remove people from their organization. Users can also reset their passwords in this module.
My Reviews	My reviews is a module in the WebGrants system that allows reviewers to review applications. Internal staff can assign applications to reviewers in the panels module. Once assigned, those reviewers will find their assigned applications in the my reviews module. Staff will have created user defined review forms and associated them to the applications. Reviewers are able to read the applications and they can complete one or more review forms. The reviewers will enter their scores and comments into the review form and submit their review. Certain additional permissions can be assigned to reviewers to allow them to view other applications not directly assigned to them or to view completed reviewed forms from other reviewers.

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New User	A new user is a user that has recently registered with the WebGrants system. New users are not immediately granted access to the WebGrants system upon successful registration. Instead they are placed in a new users' queue. Internal staff are assigned to this queue and are notified when a new user registers. It is then their responsibility to either approve this user or reject this user. In order to approve a new user, the approver must first determine if this new user is a duplicate of a user already in the system. If not, then they next determine if the organization under which the new user registered is a duplicate. The approver can then either approve the new user and their organization, approve the new user but associate them with an existing organization or reject the user completely. Once a user is approved they will receive their user id and password via email and then can login to the system.
Online Help	Online help is a system wide support function that allows users to receive screen specific help. Every screen in the WebGrants system has a dedicated online help explanation. This explanation is accessed by users by clicking the online help link on each screen. The online help displayed is divided into two parts. The system help is hard-coded help text that is written by DTPi and only editable by DTPi. The client specific help is additional help text that can be entered into each page through the online help module in the utilities module. In addition to online help, each page also has displayed directly on the page the possibility for page level help, form section level help and field level help.
Organization	Organization is a module in the WebGrants system that stores organization information for system users. Users typically, but not always, are associated with an organization. Typically granting agencies will not grant money to an individual only to an organization. Therefore, it is required that all grant seeking individuals be associated with an organization. The most common exception to this is art organizations that routinely give money to individual artists. An organization is a quasi-document in the WebGrants system. It consists of a single form with no sub components. This form has many standard system fields but is also user definable, meaning that client staff can add any number of additional fields to the organization profile.
Program Area	A program area is a concept in the WebGrants system that determines the current grant type. Grant making organizations typically give away more than one type of grant. Each of these types is a program area. With the exception of people and organizations, all documents in the WebGrants system are associated with one or more program areas. Program areas are created in the program areas module in the utilities module. Once created, program areas are associated with all activity in the system. It is not possible to create an application, grant, status report or any other document without first stating its program area. All forms developed in the form creator tool are developed on a program area basis. There are global forms but this just means they are associated with all program areas.
Site Visit	The site visit is a grant sub-component that is used to visit a grantee's project and report on the activity. A site visit is a document object that consists of forms. There are three types of site visits: grantee preparation, site visit and grantee corrections, not all three must be used. Grantee preparation are forms that are assigned to the grantee in preparation for a site visit. These forms may be information only or they may request information that the grantee must submit. The site visit are the forms assigned to a site visitor that are completed by the site visitor when they visit the site. These documents are not visible to the grantee. The last type are grantee corrections that are sent to the grantee to prove that all issues found during the site visit have been corrected. This process can be repeated any number of times for a single grant. The site visit has all the standard document functionality including negotiation, withdrawal, notes, feedback, mapping and versions.

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Status Reports	Status reports is a grant sub-component that is used by the grantee to report upon recent grant activity. A status report is a document object that consists of forms. Status report are typically submitted according to a schedule. Internal staff can set a status report schedule which will send automated notifications to the grantee when their status report is due. status reports typically consist of user defined forms; however, it is possible to copy any grant form from the grant to the status report. Forms like the budget or objectives can be copied to the status report and the grantee can report on the progress of those forms. The status report has all the standard document functionality including negotiation, withdrawal, notes, feedback, mapping and versions.
Submitted Applications	Submitted applications is a module in the WebGrants system that is the first location for all submitted applications in the system. This module acts as a quality control area where staff can perform a preliminary review of the application to make sure that it is of good quality and that all the required information is there and attached properly. If there is a problem with the application, staff can negotiate the application back to the applicant for corrections. Once everything is in order, staff can release the application for review.
Versions	Versions are copies of forms in the WebGrants system. When a document is submitted, internal staff can determine that there is some issue with the data in the form and may want to negotiate the form back to the applicant or grantee. When this is done, WebGrants will automatically version the form. This means that the system will create a duplicate of the form. This copy will be saved in the system as a previous version. The new version can then be negotiated and revised. This process allows clients to retain all original versions of forms in the system and not lose any data in the correction process. A single form can be versioned any number of times in the system.