

Example Instructor-Led Training Design

- System training program for enterprise users
- Includes demonstrations and guided practice
- Uses exercises and checkpoints to reinforce learning
- Designed to support real workflow tasks

Introduction to the Grants Management System Training Part One

FOR GRANT MANAGEMENT & REPORTING

INTEGRATORS

GMRI 100

Course Agenda



Course Introduction

Module 1: Grants Management System Review

Module 2: Grantee Portal and Eligibility Review

Module 3: Cards and Filters

Module 4: Registration – LOI Card

Course Wrap-up



Course Description

This course provides GMRI with the knowledge needed to filter cards, understand the grant workflow, and process a Letter of Inquiry from a grant seeker.

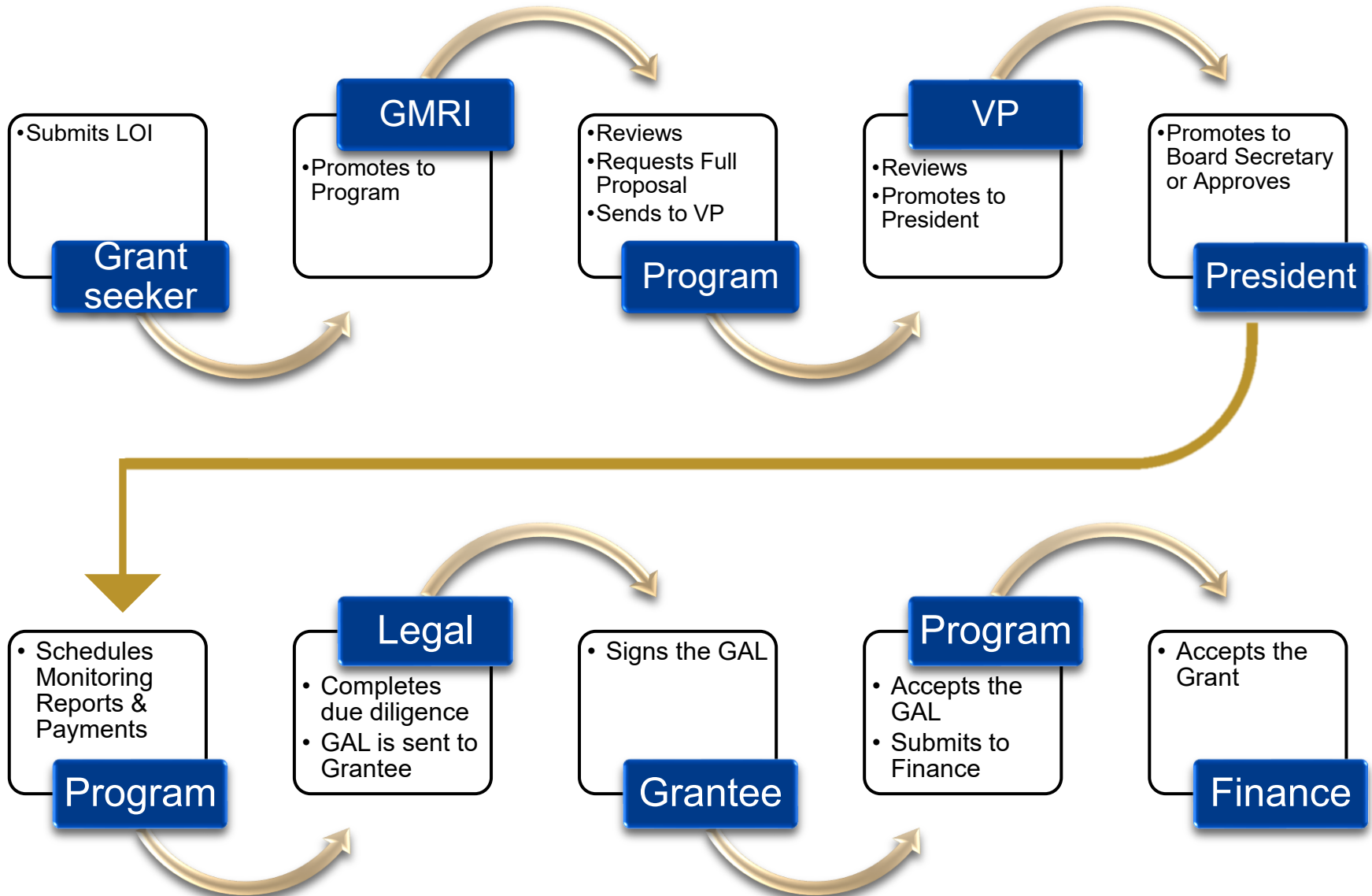


Course Objectives

Upon completion of this course, you should be able to:

- Recall general concepts of the GMS
- Search for Records and set up filters and GMRI specific cards
- Describe the workflow process for new grantee registration
- Identify the elements of a the Registration – LOI card

Grant Request Process



Module 1: Checkpoint

- If a request in the GMS has a workflow status of Initial Review, what role will have the next step in the process?
- Name at least two of the administrator functions the GMRI role will perform.



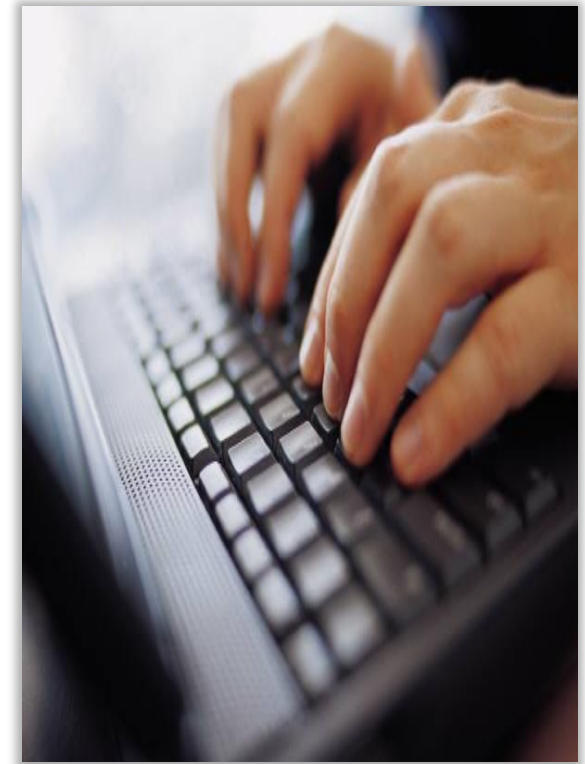
Demo: Open and Filter Cards

1. Open a card
 2. Next and Previous buttons
 3. Collapse, Minimize, and Maximize a card
 4. Filter and sort a card
 5. Dashboards
 6. Search features
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Exercise 3a: Set up a Filter on LOI Card

Go ahead and log in to the Grants Management System.

Use the Exercise Handout to complete Exercise 3a.



View the Workflow Status

Key Points

- Workflow - The sequence of processes through which a grant passes in the Grants Management System. The term **status** refers to where, in the Workflow, a grant or activity may be.
- Workflow status appears on the card.
- Clicking the yellow box allows you to view the workflow for that card.

Exercise 3b: View the Workflow States

Go ahead and complete Exercise 3b.

What do you notice about the workflow states?



Module 3: Checkpoint

- How can you tell when a card is filtered?
- How can you choose to use a different dashboard?
- What prompts the workflow status to change?



Review Objectives

You should now be able to:

- Recall general concepts of the GMS
- Search for Records and set up filters and GMRI specific cards
- Describe the workflow process for new grantee registration
- Identify the elements of a the Registration – LOI card

Questions

