

How To – Navigate the Blue Tools Menu in TDA-GO

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Tools: Add/Edit People

The **Add/Edit People** page allows the Grant Recipient to add or edit people associated with the grant. After selecting **Add/Edit People** from the blue column, select the **+** to add a new person, select the pencil icon to edit a person.

The screenshot shows the 'Document Add/Edit People' page in the TDA GO! system. The page header includes the Texas Department of Agriculture logo and the text 'TEXAS DEPARTMENT OF AGRICULTURE COMMISSIONER SID MILLER' and 'TDA GO! TEXAS DEPARTMENT OF AGRICULTURE GRANTS ONLINE'. The left sidebar contains a menu with options like 'Forms', 'Status Options', 'Tools', 'Add/Edit People', 'Status History', 'Attachment Repository', 'Modification Summary', 'Document Validation', 'Notes', 'Main Document', and 'Related Documents'. The main content area is titled 'Document Add/Edit People' and shows a table of people assigned to a document. The table has columns for 'Person', 'Organization', 'Role', 'Active Dates', and 'Assigned By'. A red arrow points to the '+' button in the top right corner of the table, and another red arrow points to the pencil icon in the bottom right corner of the table.

| Person | Organization | Role | Active Dates | Assigned By |
|-------------------------------|---|---------------------|-------------------------|--------------|
| Ad, Seamus | Test Grantee Organization | Authorized Official | 08/02/2021 - 12/14/2021 | Grant System |
| Ad, David | Test Grantee Organization | Authorized Official | 08/02/2021 - | Grant System |
| Ad Test, Delane | TSDOK Provider | Authorized Official | 08/02/2021 - | Grant System |
| Barnard, Suzanne | TSDOK Provider | Project Director | 08/02/2021 - | Grant System |
| Fryer, Wendy | Test Grantee Organization, TSDOK Provider | Program Specialist | 08/02/2021 - | Grant System |
| Fryer, Wendy | TSDOK Provider | Program Specialist | 08/02/2021 - 09/10/2021 | Grant System |
| Edmons, Audrey Ann | TSDOK Provider | Program Specialist | 08/02/2021 - | Grant System |
| Edmons, Audrey Ann | TSDOK Provider | Program Specialist | 08/02/2021 - | Grant System |
| Edmons, Audrey Ann | TSDOK Provider | Program Specialist | 08/02/2021 - | Grant System |
| Grant Specialist, Delane | TSDOK Provider | Grant Specialist | 08/02/2021 - | Grant System |
| Hicks, Chad | TSDOK Provider | Grant Specialist | 08/02/2021 - | Grant System |
| Hicks, Ryan | TSDOK Provider | Program Specialist | 08/02/2021 - | Grant System |
| Id, Jane | Test Grantee Organization | Project Director | 08/02/2021 - | Grant System |
| Program Specialist, Delane | TSDOK Provider | Program Specialist | 08/02/2021 - | Grant System |
| Specialist, Program | Test Grantee Organization | Program Specialist | 08/02/2021 - | Grant System |
| Test, Mary | Test Grantee Organization | Authorized Official | 08/02/2021 - | Grant System |
| TDA, Program Specialist | TSDOK Provider | Program Specialist | 08/02/2021 - | Grant System |
| TDA, Contract Specialist | TSDOK Provider | Grant Specialist | 09/16/2021 - | Director TDA |
| TDA, Lead Contract Specialist | TSDOK Provider | Grant Specialist | 09/16/2021 - | Director TDA |
| Wright, Brian | TSDOK Provider | Program Specialist | 08/02/2021 - | Grant System |

Figure 1. Use the + button to Add people, use the pencil icon to Edit people

Tools: Status History

The **Status History** page allows the Grant Recipient see the status of documents, including each occasion where the status was changed; to export a list of status changes document, select the small blue box.

The screenshot shows the 'Document Status History' page in the TDA GO! system. The page header is the same as Figure 1. The left sidebar is the same as Figure 1. The main content area is titled 'Document Status History' and shows a table of document status history. A red arrow points to the small blue box in the top right corner of the table.

| Status | Date/Time | Person | Name |
|-------------------------------|-----------------------|--------|------|
| Performance Report in Process | 8/20/2021 11:42:20 PM | jane P | |

Figure 2. View Status History here

Tools: Attachment Repository

The **Attachment Repository** page allows the Grant Recipient to view and download documents. To download a document, select the document (1), select ZIP (2), and the document will compress and download (3).

The screenshot displays the TDA GO! interface for the Attachment Repository. The header includes the Texas Department of Agriculture logo and the text 'TEXAS DEPARTMENT OF AGRICULTURE COMMISSIONER SID MILLER' and 'TDA GO! TEXAS DEPARTMENT OF AGRICULTURE GRANTS ONLINE'. The left sidebar contains a navigation menu with options like Home, Searches, Forms, Status Options, Tools, Landing Page, Add/Edit People, Status History, Attachment Repository (highlighted), Modification Summary, Document Validation, Notes, Print Documents, and Related Documents. The main content area is titled 'Document Attachments' and shows a summary of the document being viewed, including the Template (Community Development Block Grant 2021), Instance (CDBG - Colonia Fund - Construction - 2021), Process (Application), Document Name (CFC2021058), Document Status (Grant Agreement Pending Grant Recipient Signature), Your Role (Authorized Official), and Due Date (12/01/2020 11:59:00 PM). Below this is a table of attachments with columns for Form Name, Field Name, a checkbox, Zip, and Attachment Link. The first row is highlighted, and a red circle with the number 1 points to it. A red circle with the number 2 points to the 'Zip' checkbox in the first row. At the bottom, a red circle with the number 3 points to the 'DocAttachments.zip' download button. A 'Show All' button is also visible.

| Form Name | Field Name | | Zip | Attachment Link |
|---|---------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| CFC - Colonia Support Documentation: M1 | Map of Colonia Boundaries | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| CFC - Colonia Support Documentation: 2 | Map of Colonia Boundaries | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| CFC - Colonia Support Documentation: M1 | Supporting Documents | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| CFC - Colonia Support Documentation: 2 | Supporting Documents | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| Grant Agreement Details | Project Locations | <input type="checkbox"/> | <input type="checkbox"/> | Infomr.jpg |
| Project Beneficiaries and Locations: Green Community - Water/Sewer Improvements (GCI) | Beneficiary Support Doc | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| Required Uploads | AppAvailability | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| Required Uploads | AuditLetter | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| Required Uploads | EngineersBenefit | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| Required Uploads | FEMAmap | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| Required Uploads | LocalService | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| Required Uploads | MatchDocumentation | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| Required Uploads | Project Map | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| Required Uploads | Project Map Census | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| Required Uploads | PublicHearing | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| Required Uploads | ResolutionPassed | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| Required Uploads | SAMRegistration | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |
| Required Uploads | SelectionGuidelines | <input type="checkbox"/> | <input type="checkbox"/> | TBO Teambuilding - Holiday 2019.pdf |

Figure 3. The Attachment Repository holds many documents associated with your grant

Tools: Modification Summary

The **Modification Summary** page allows you to compare two versions of the document submitted over time. **EXAMPLE:** You can compare the original grant agreement to the grant agreement once an amendment has been approved.

The screenshot shows the 'Document Modification Summary' page in the TDA GO! system. The page header includes the Texas Department of Agriculture logo and 'TDA GO! TEXAS DEPARTMENT OF AGRICULTURE GRANTS ONLINE'. The left sidebar contains a menu with options like 'Forms', 'Status Options', 'Tools', 'Landing Page', 'Add/Edit People', 'Status History', 'Attachment Repository', 'Modification Summary' (highlighted with a red box), 'Document Validation', 'Notes', 'Print Document', and 'Related Documents'. The main content area is titled 'Document Modification Summary' and includes instructions on how to compare two versions. Below this, there is a table for 'Applicant Contact Information' comparing Version A (1/1/2001 12:00:00 AM) and Version B (Current). The table lists fields such as Authorized Official, AO Telephone, AO Email, SameAsOrgAO, AO Street, AO City, AO State, and AO Zip, with their respective values and any differences.

| Field Name | Version A - 1/1/2001 12:00:00 AM | Version B - Current | Difference (if numerical) |
|--------------------|----------------------------------|--------------------------------------|---------------------------|
| AuthorizedOfficial | | Mary Sue | |
| AO Telephone | | (512) 463-7476 | |
| AO Email | | Suzanne.Barnard@TexasAgriculture.gov | |
| SameAsOrgAO | | True | |
| AO Street | | PO Box 12847 | |
| AO City | | Austin | |
| AO State | | Texas | |
| AO Zip | | 78711 | |

Figure 4. The Modification Summary

Tools: Document Validation

The **Document Validation** page identifies those pages where required fields are not yet completed, or where errors exist that prevent the document from moving forward.

The screenshot shows the 'Document Validation' page in the TDA GO! system. The page header includes the Texas Department of Agriculture logo and 'TDA GO! TEXAS DEPARTMENT OF AGRICULTURE GRANTS ONLINE'. The left sidebar contains a menu with options like 'Forms', 'Status Options', 'Tools', 'Landing Page', 'Add/Edit People', 'Status History', 'Attachment Repository', 'Modification Summary', 'Document Validation' (highlighted with a red box), 'Notes', 'Print Document', and 'Related Documents'. The main content area is titled 'Document Validation' and includes instructions on how to validate the document. Below this, there is a table for 'Document Validation' showing the status of various forms. The table lists fields such as Form Name, Status, and May Prevent Status Change. The table shows that the 'Quarterly Performance and Budget Report' form is required and has not been saved, which may prevent status change.

| Form Name | Status | May Prevent Status Change |
|---|---|---------------------------|
| Quarterly Performance and Budget Report | Form is required and has not been saved | Yes |

Figure 5. The Document Validation

Tools: Notes

The **Notes** page allows both the Grant Recipient and TDA to record comments and upload additional documents regarding the Performance Report. Once a Note is saved using the paper airplane icon, subsequent information can be added by any person assigned to the document as a reply within the same thread, or a new note can be created. Adding a Note does not send a system alert or email notification.

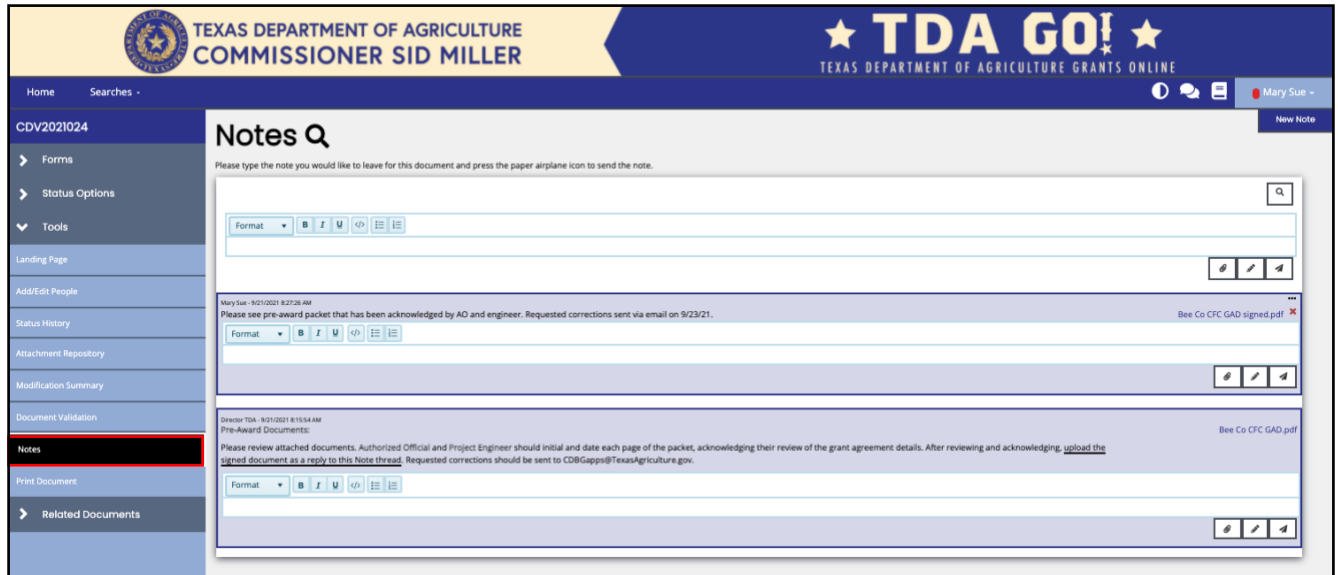


Figure 6. Saved Notes

Tools: Print Document

The **Print Document** page allows the Grant Recipient to print documents. Select the specific pages you would like to include in the printout. Click Print to generate a PDF document.

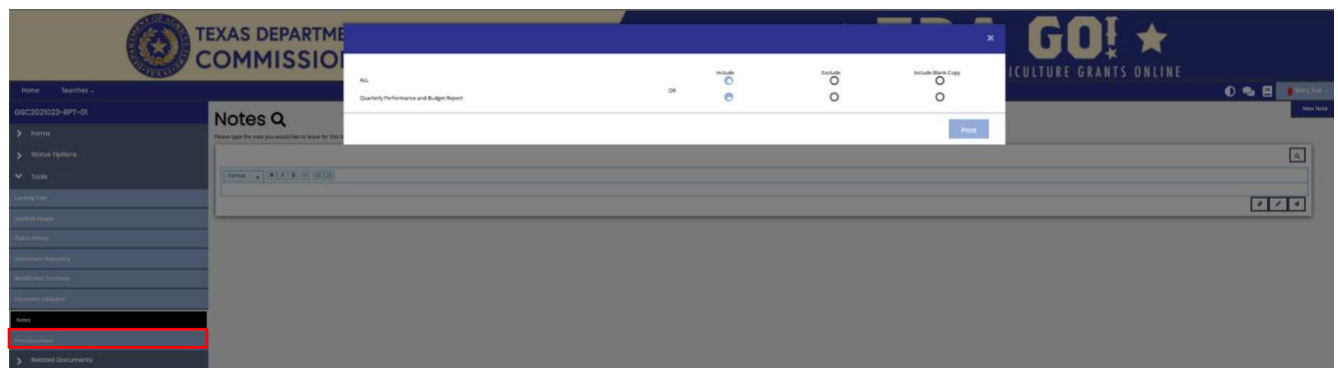


Figure 7. Print Document button allows the Grant Recipient to print documents

Related Documents: Initiate Related Doc

The **Initiate Related Doc** generates subdocuments related to a “parent” application document. Related Documents include Payment Requests, Performance Reports, Materials and Services Reports, and Monitoring Forms.

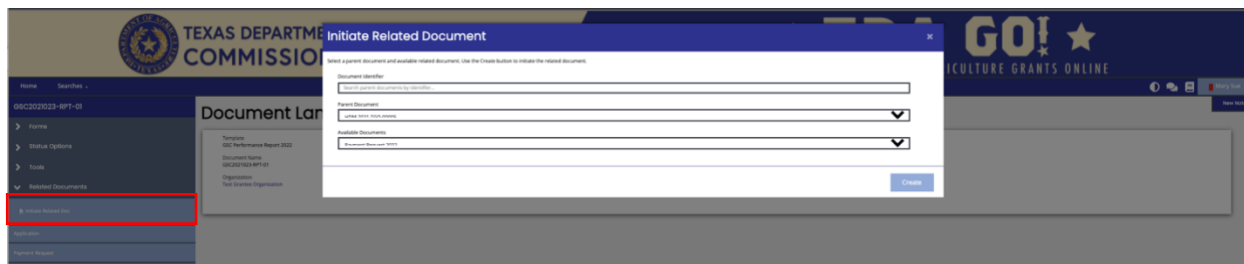


Figure 8. Initiate Related Documents creates subdocuments related to an application

Related Documents: Application

When viewing a subdocument, the Related Documents section of the menu will allow you to return to the application. The **Application** button will activate a light blue window; choose the grant application you desire.

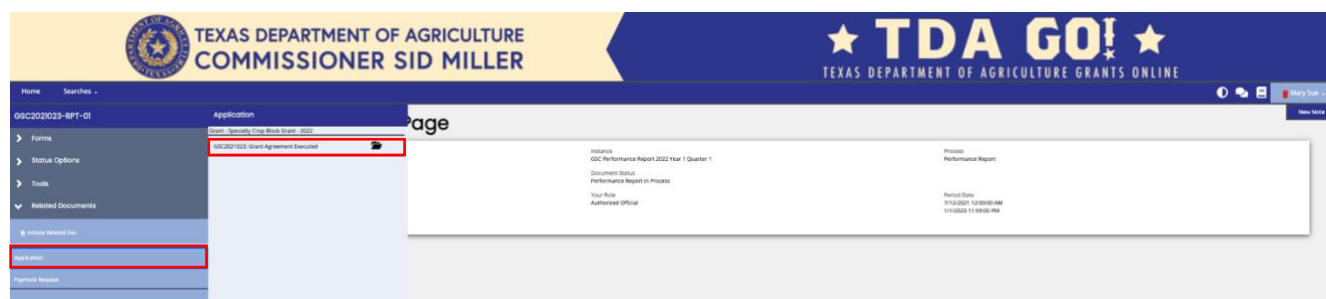


Figure 9. The Application button will present a list of grant applications to view

Related Documents: Payment Request

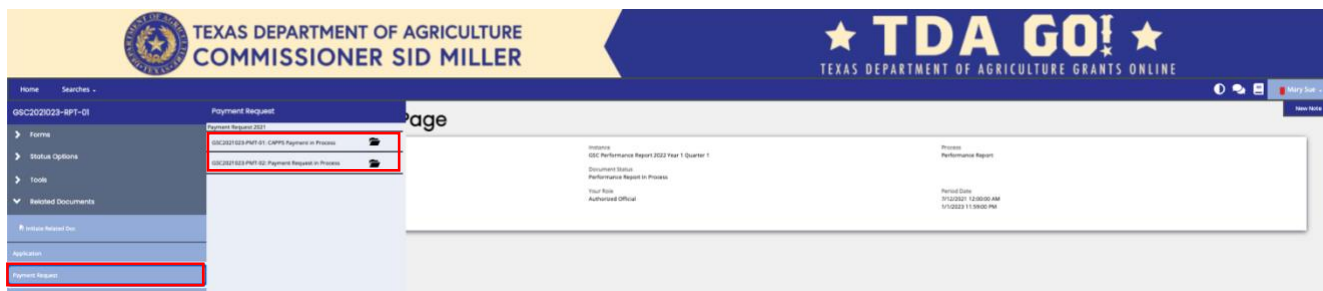


Figure 10. The Payment Request button will present a list of grant applications to view.