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.

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.

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).

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.

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.

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.
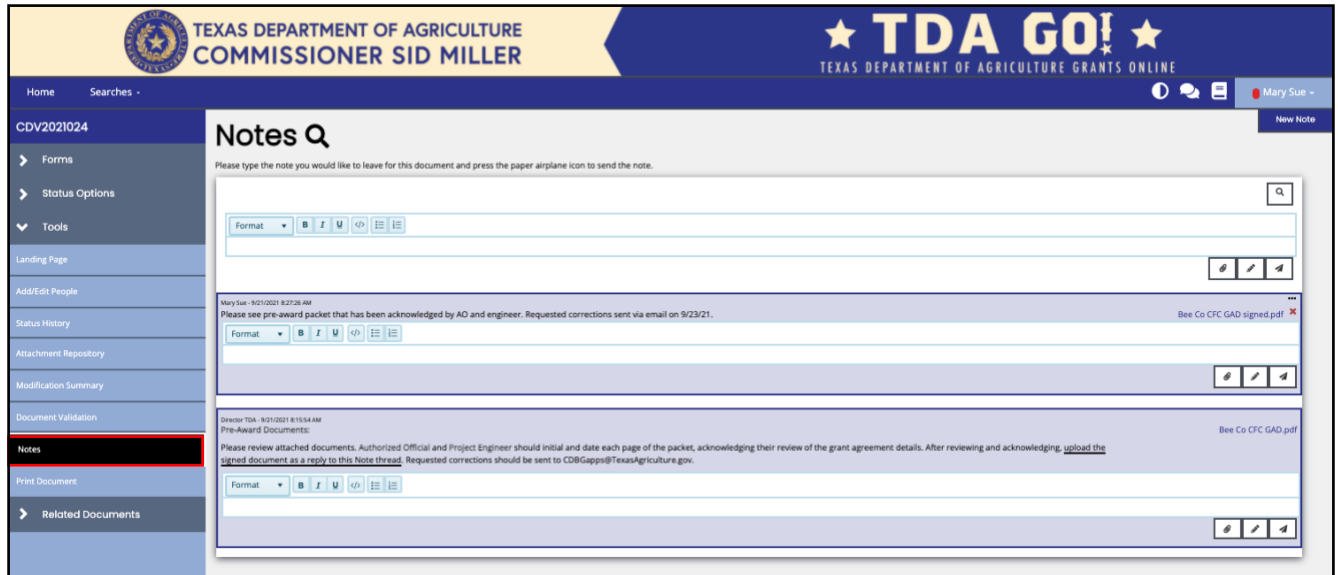

Figure 6. Saved Notes

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.
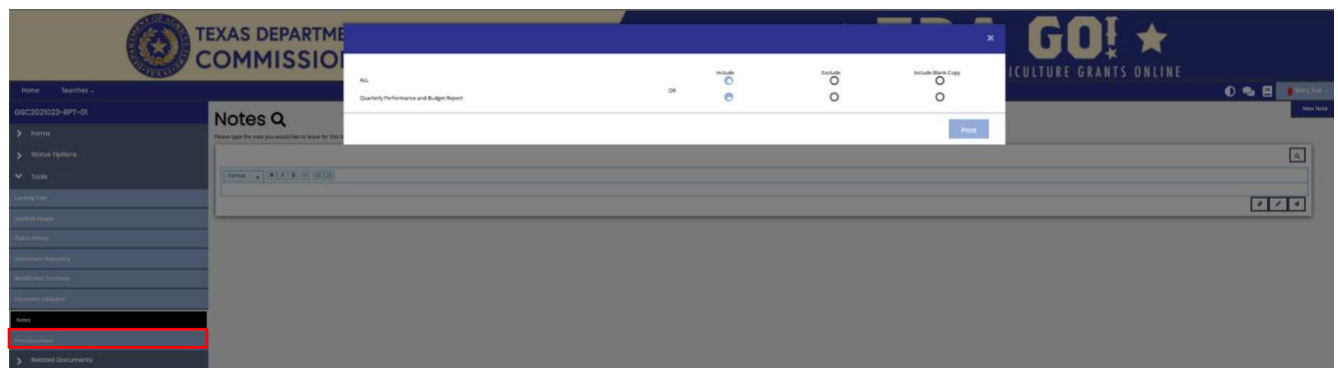

Figure 7. Print Document button allows the Grant Recipient to print documents

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.
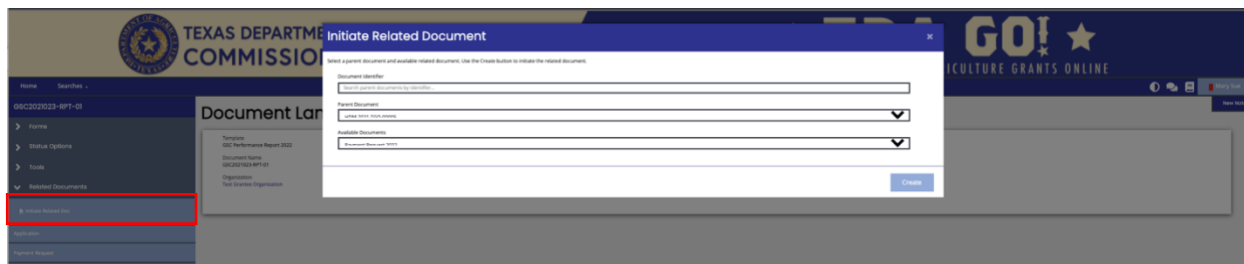

Figure 8. Initiate Related Documents creates subdocuments related to an application

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.
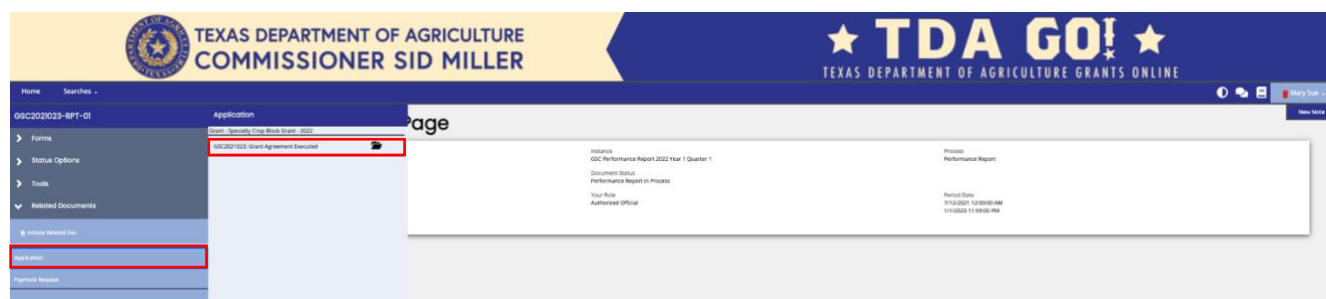

Figure 9. The Application button will present a list of grant applications to view
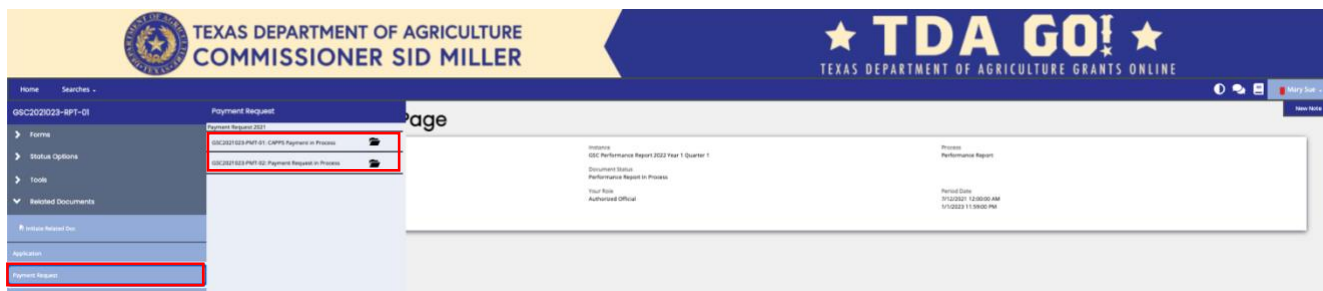
Related Documents: Payment Request

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