Grants eManagement System

GRANTEE USER GUIDE

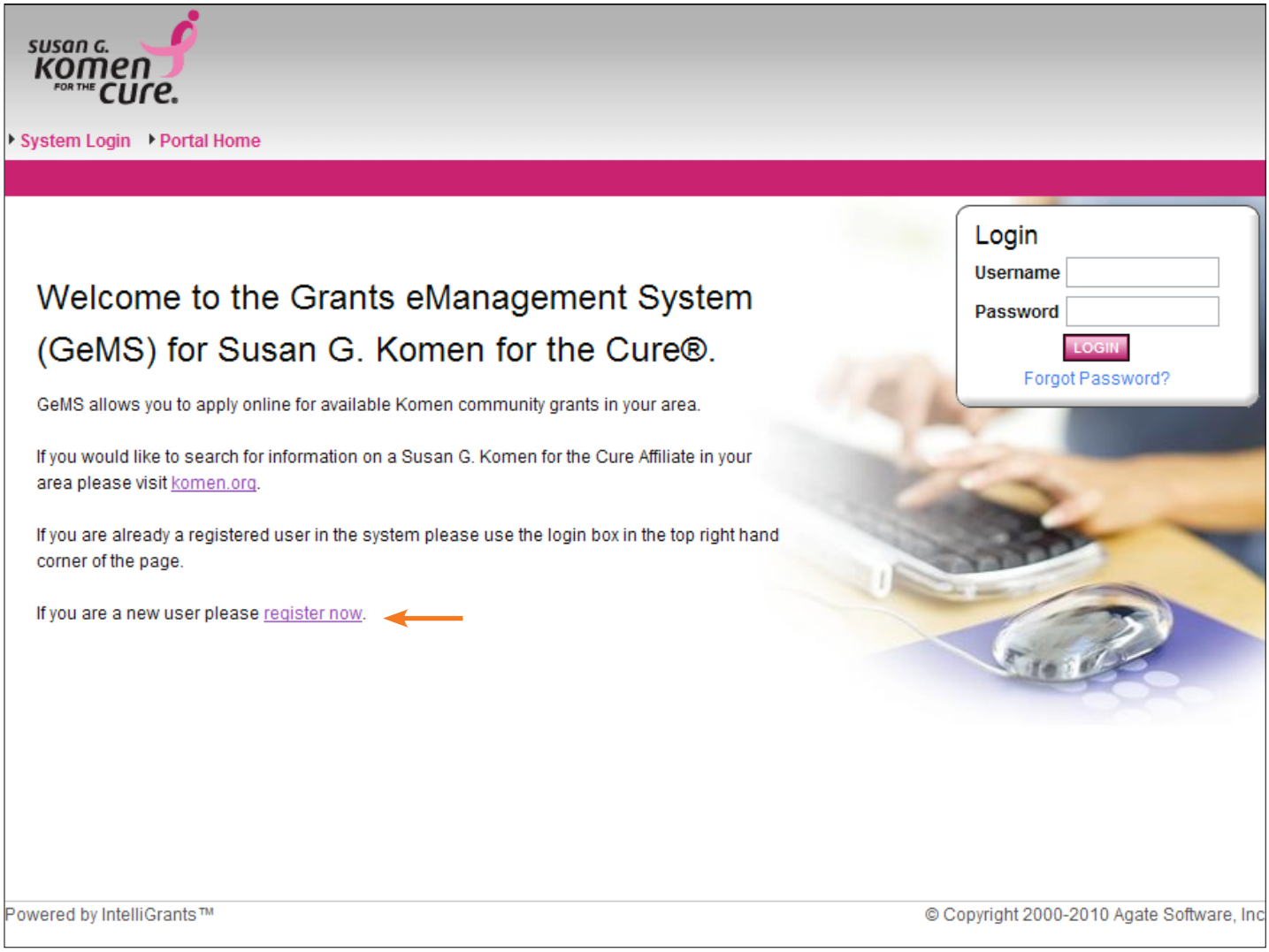
Version 1.0

Table of Contents

Susan G. Komen for the Cure® GeMS Login and Registration **3**
Gaining Access to GeMS **4**
User Roles 4
User Registration 5
User Validation 7
Homepage review 8
Application **10**
Application Menu 10
System Functionality **14**
Forms Navigation 14
Form Completion 15
Automatic Calculations 16
Error Messages 17
Uploads and Attachments 17
PDF Version 18
Copy and Paste 18
Text Limit 18
Application Revision **19**
Contract Acceptance **23**
Accepting the Contract 23
Declining the Contract / Modifications needed 26
Progress and Final Reports **32**
Report Creation 32
Report Completion 32
Report Submission 37
Grant Changes **40**
Amendment Submission 40
Amendment Resubmission 44
Automatic e-Mail Notifications **47**
System Notifications 47
Supporting Documents **48**
Helpful Hints 48

Susan G. Komen for the Cure® GeMS Login and Registration

To access Susan G. Komen GeMS, type "https://affiliategrants.komen.org" into the address bar of your web browser and hit "Enter." The page you see should look like the image shown below.



Gaining Access to GeMS

Welcome to GeMS! In order to use the system you must first be granted access to it. There is one basic way to get access to GeMS and that is through creating an account. Prior to doing so, we recommend that you take some time to think through what system roles are appropriate for the individuals in your organization. There is also an order in which registration should occur by users at your organization so please plan this step first.

Your organization should already have a Project Director assigned in GeMS. These next pages are a reminder/refresher of the registration process and also instruction for additional users at your organization.

GeMS User Roles

Project Director:

The role of Project Director should be assigned to the individual at your organization that will serve as the project's lead contact. This individual is responsible for validating all new users when they register for the system under their organization. This individual will have the highest level of access in the system and will be responsible for overseeing all of the administrative functions available such as application creation and completion.

Authorized Signer:

The role of Authorized Signer should be assigned to the individual at your organization that has the authority to sign legal documents on behalf of the organization. This individual is responsible for electronically signing the application before submission and the grant contract and Progress Reporting if the organization is awarded funds.

Viewer:

The role of viewer should be assigned to any individual at your organization that needs access to view the organization's information but does not need the functionality to save, add, edit, or change anything within the organization's information.

Writer:

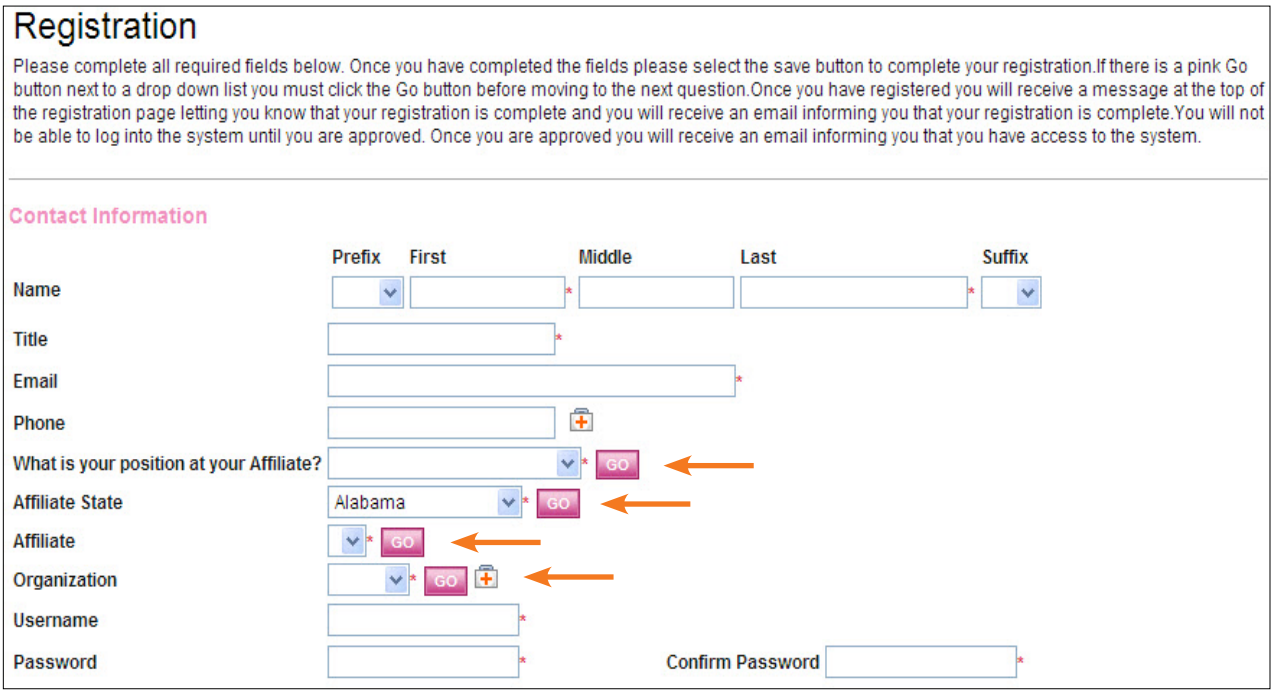
The role of writer should be assigned to any individual that needs access to an organization's application process to help complete the application but does not have the authority to complete the submission process. This individual cannot change the status of an application and will not have administrative function availability.

Helpful Hints:

- The Project Director must be the first individual at your organization to register.
- The Authorized Signer must register and be validated/approved prior to the creation of the organization's first application.

To create a new user account:

1) From the Susan G. Komen GeMS system homepage click the "register now" link located towards the bottom of the homepage.



2) Complete the user form in its entirety. Once any user has created a user account and gained access to the system, they will never have to request access again. There is no need for multiple accounts within GeMS.

a) Fill in all information as required. All items marked with an '*' are required to create your account.

b) If a question has a pink "GO" button next to it, complete the question and then select the "GO" button and wait 5 seconds before advancing to the next question.

c) Always select either "applicant" or "grantee" in the "What is your position at your Affiliate" question.

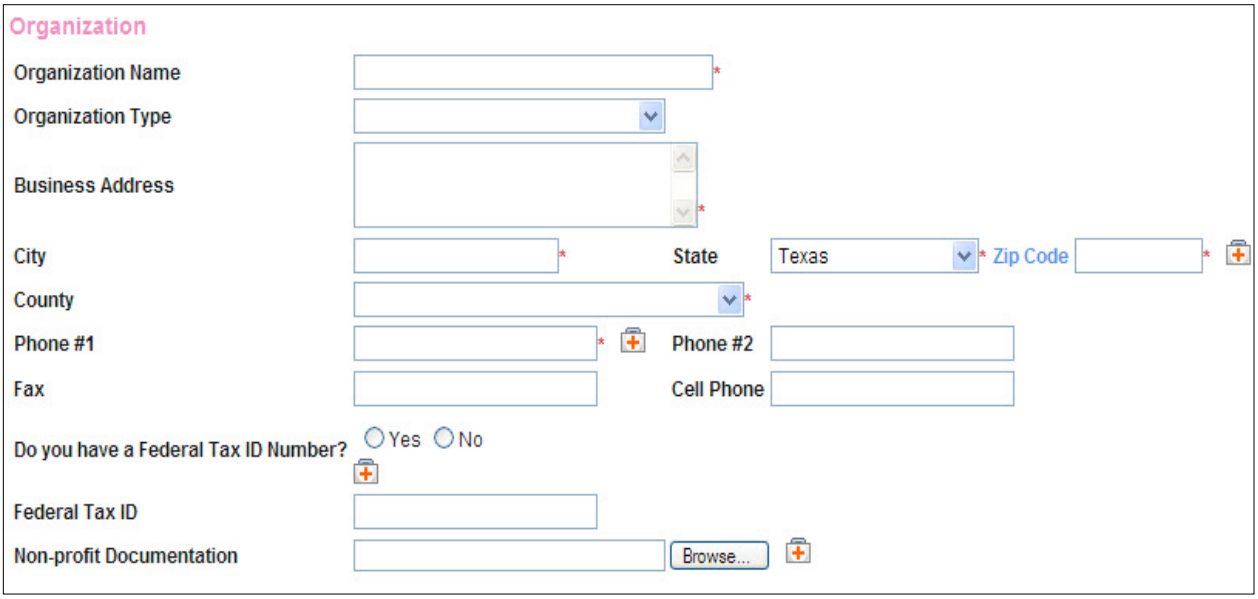
d) In the "Organization" field, if you are a previous applicant you should see your organization name listed. If you are a new applicant, select "Other."

e) The "Username" field must consist of all letters and numbers, minimum length 5 characters, maximum length 20 characters.

f) The "Password" field must consist of all letters and numbers, minimum length 7 characters, maximum length 20 characters.

g) The fields "Password" and "Confirm Password" must be the same.

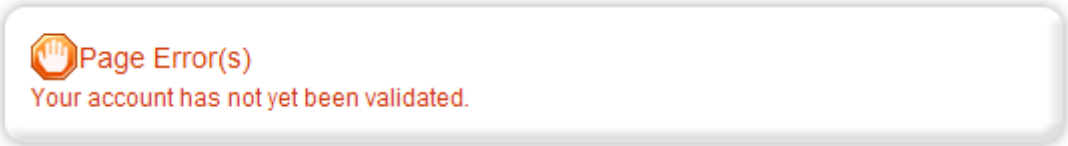
3) If your organization already exists within GeMS, please select your organization from the organization drop down list. If your organization does not exist, please choose other in the organization drop down list. If you choose other, you will be required to complete the organization registration section.



4) Click "Save" in the upper right hand corner to save the data.

Having saved your contact information, your account must then be approved before you can access the system.

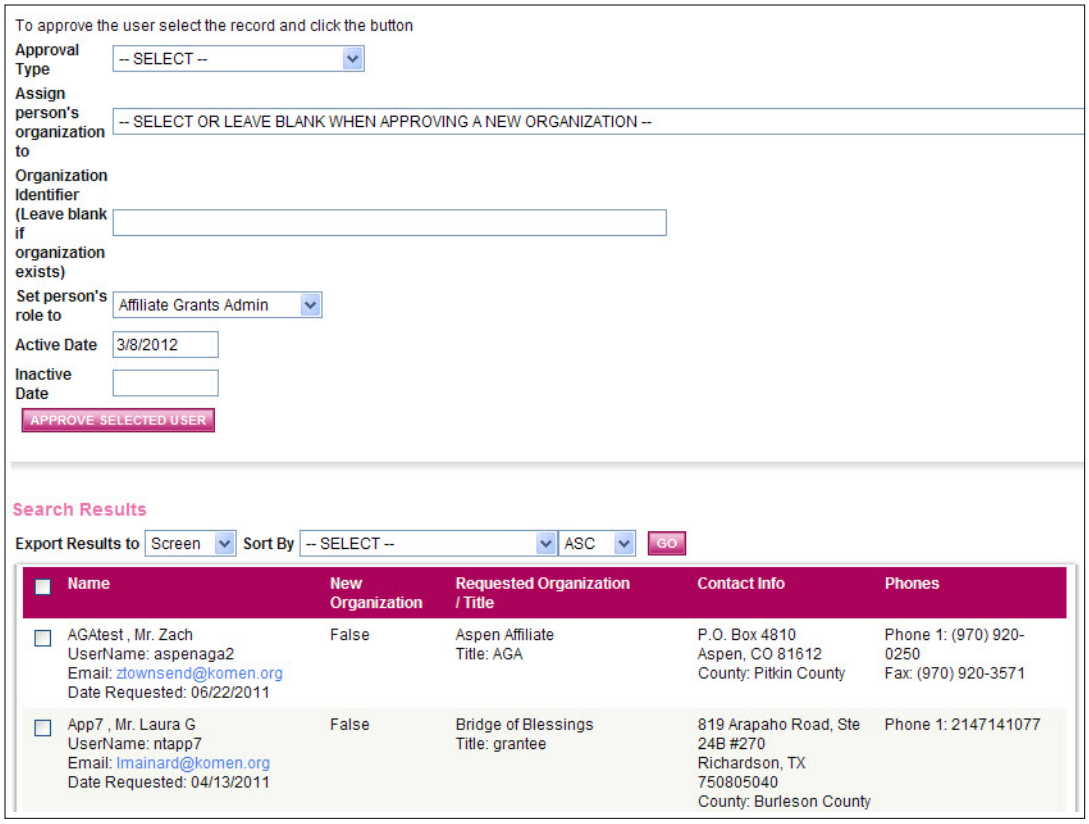
If you attempt to access the system prior to getting approved/validated you will receive the following message:



You will receive notification that your registration has been submitted for approval and when access has been granted, you will receive an email message confirming that your account has been validated.

Project Directors will be approved/validated by an Affiliate representative and all other users will be approved/validated by the organization's Project Director.

In order for all users within an organization to be validated/approved, the Project Director must follow the steps listed below the screen image.

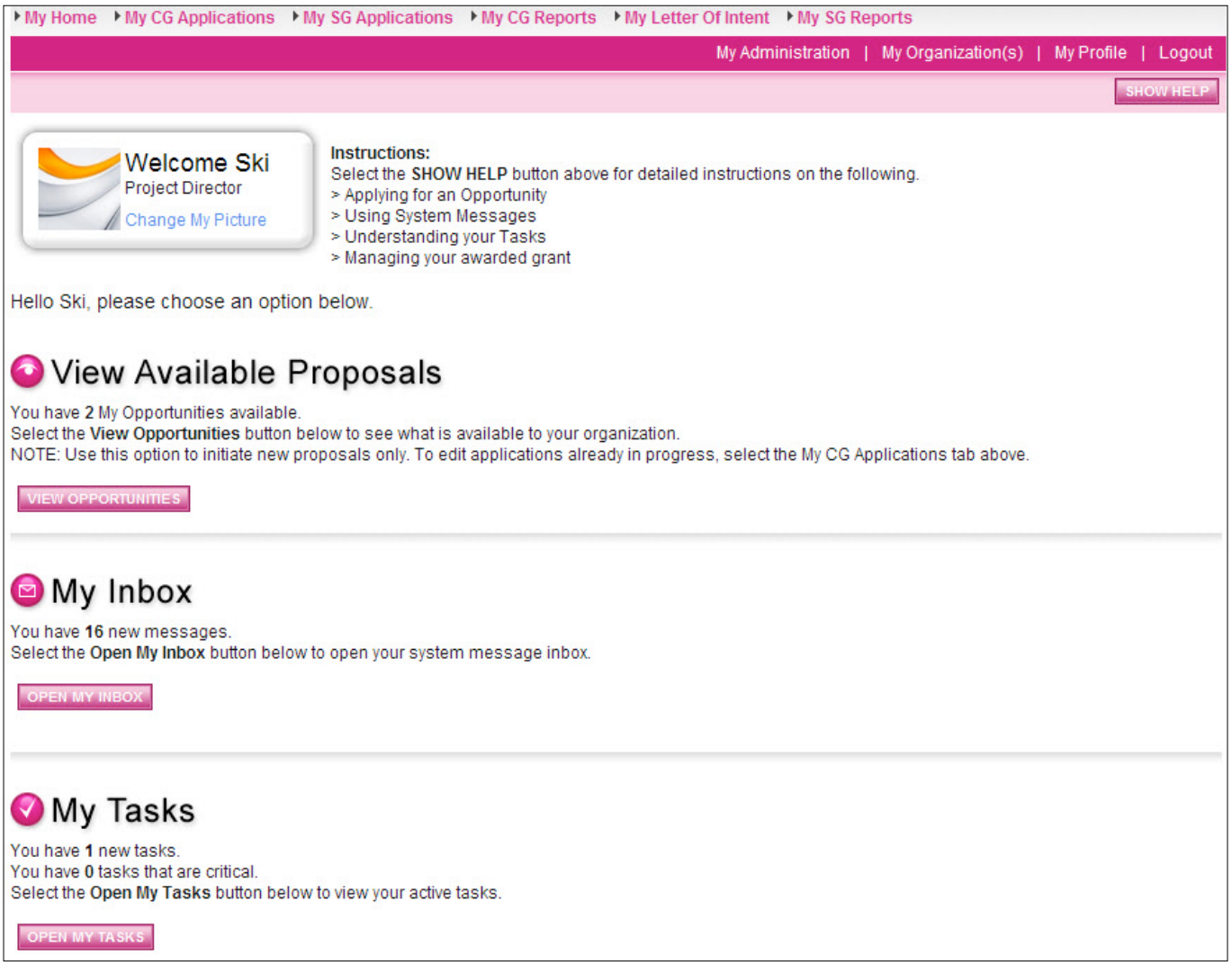


To validate/approve a user within your organization:

1) The Project Director will receive an email that a new user within their organization has registered and needs to be validated.
2) Project Director logs in to GeMS:
   a) Select the "My Administration" tab at the top of the homepage.
   b) Select the "User Approval for Project Directors" link within the My Administration page.
   c) Once on the Komen Project Director User Approval Page, enter the new registrant's name in the search criteria. You may also search the system for "new users" for a broader search.
   d) Select the pink "Search" button.
   e) Scroll down to "Search Results" section.
   f) Select the checkbox next to the user's name in the Search Results section.
   g) Select "Approval Type" / Approve User or Deny
   h) Assign the person's organization to the organization the Project Director belongs to.
   i) Select a role for the user / Authorized Signer, Project Director, Writer, Viewer
   j) The current date will appear in the "Active Date" field and you do not have to enter anything into the "Inactive Date" field unless you know the date you would like the user's access to be inactivated.
   k) Select the "Approve Selected User" button to complete the user's validation/approval.
3) The user will receive an e-Mail Notification that they have been approved and can now access GeMS.

User Homepage

When a user logs into GeMS, they will land on the User Homepage. The content of the page and links across the top of the screen are described on the next page.



Helpful Hint:

When utilizing the task list or executing a search, always select the name of the application to enter the application forms. Selecting the organization name is not a path to enter the application forms.

User Tabs

- My Home: Brings the user back to their homepage
- My CG Applications: Access to all community grants applications already in progress
- My SG Applications: Access to all small grant applications already in progress
- My CG Reports: Access to all community grant progress and final reports already in progress
- My SG Reports: Access to all small grant final reports already in progress
- My Legacy Grants: Access to all grants funded to an organization prior to 2012
- My Administration: Administrator functions, user approval. This tab will only appear for authorized users.
- My Organization: Current information about your organization. (This information can be updated at any time by authorized users)
- My Profile: Individual user information. (This information can be updated at any time)
- Logout: Logout of the system
- View Available Proposals: Initiate a new grant application offered by the Affiliate.
- My Inbox: System notifications regarding system users and application status.
- My Tasks: List of current tasks that you must complete.

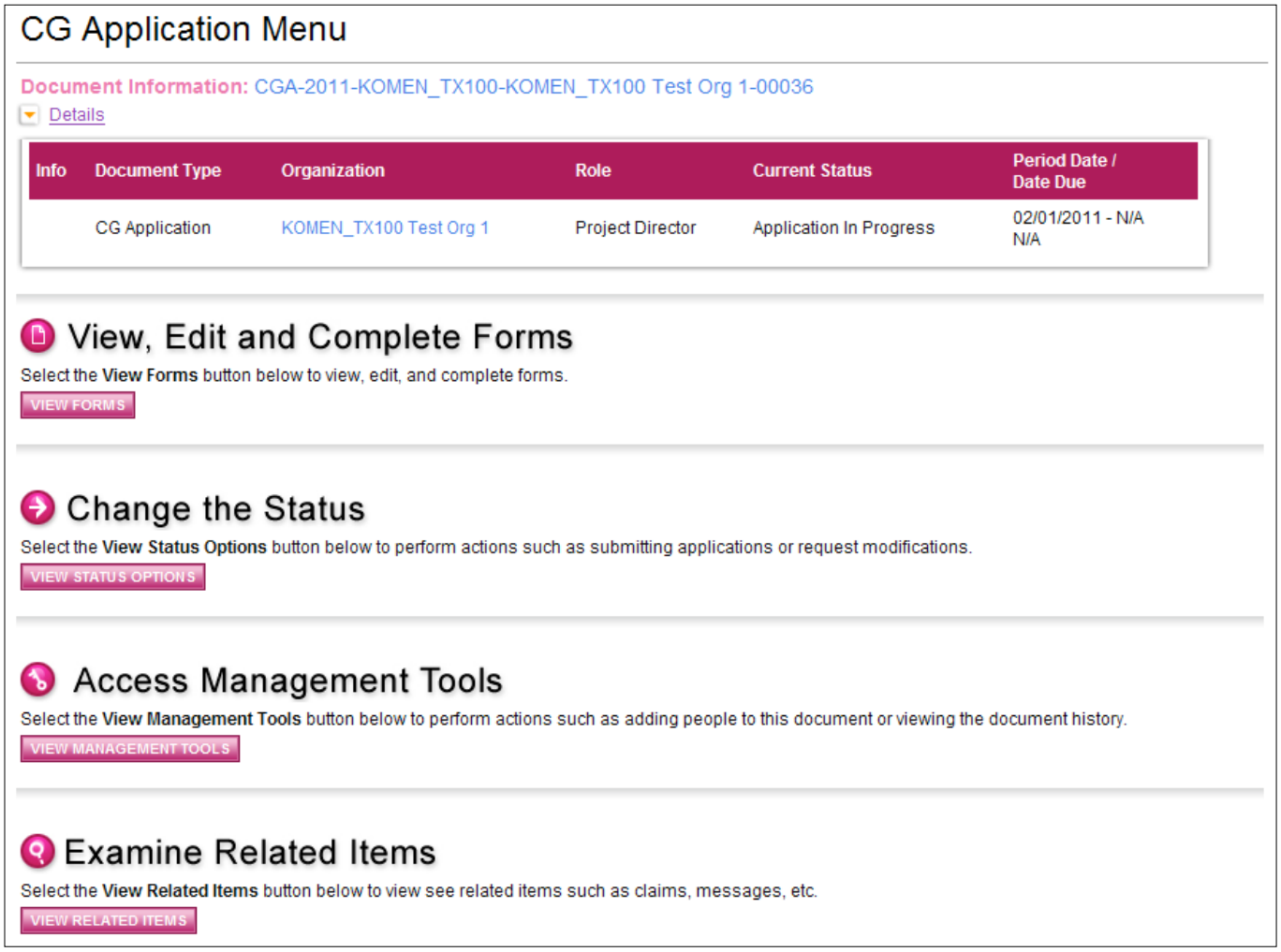
Helpful Hint:

To view/edit/complete applications that are already in progress, go to your "My CG Applications" tab. To initiate a new or additional application, click on the "View Available Proposals" tab.

Application

Application Menu

The Application Menu is organized into various sections according to the application tasks and information. These sections are displayed and described below.

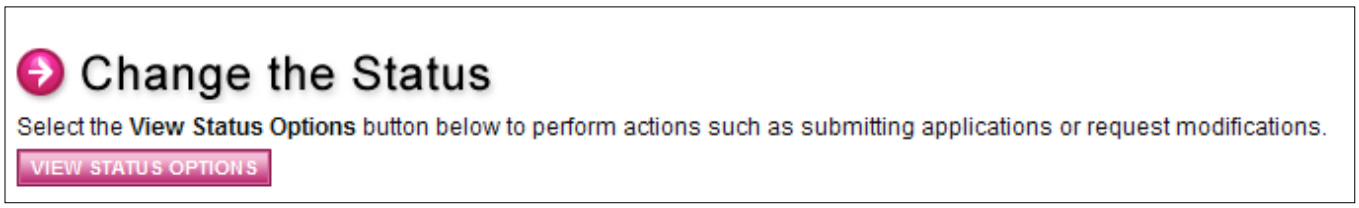


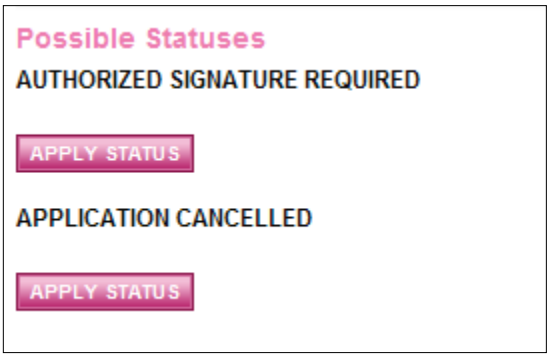
View, Edit and Complete Forms

The Forms section is where the vast majority of the work in an application is completed. This section contains all of the forms that must be completed prior to application submission and after the application has been awarded. To edit application forms simply click “View Forms” button and then click on the name of the form you wish to edit.

Change the Status

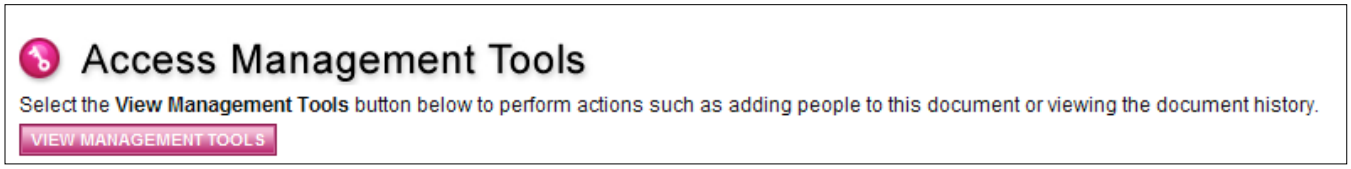
The "Change the Status" section allows a user to change the status of the application or report. Status options are dependent on the current status of the document and the role of the user. Click the "View Status Options" button to see what status push options you currently have available.

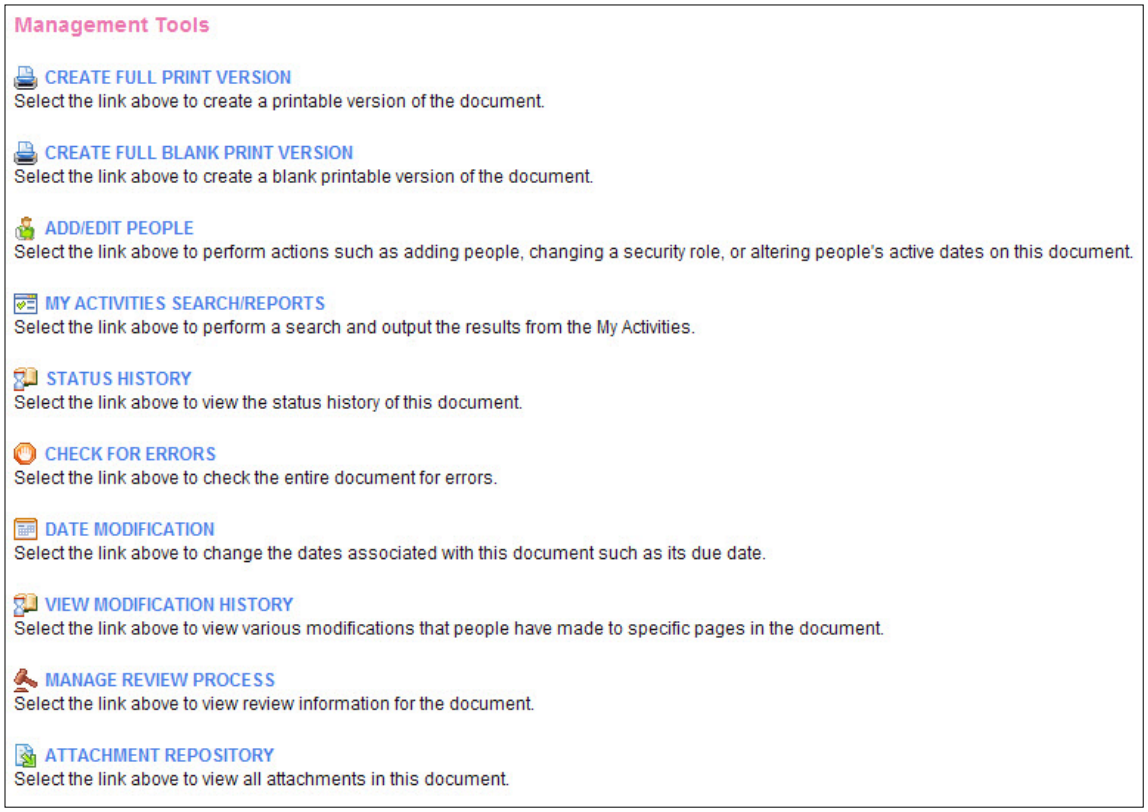




Management Tools Section

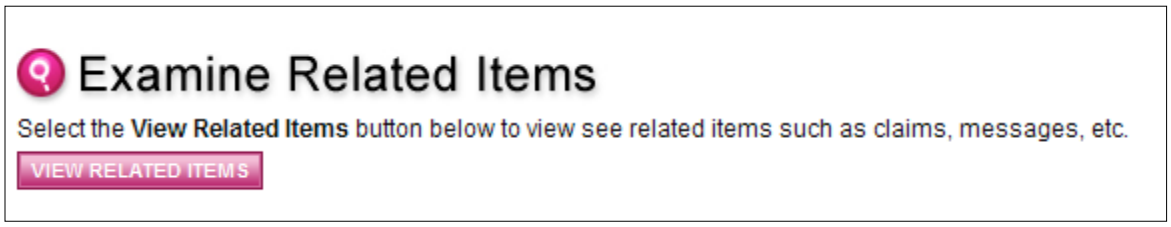
The Management Tools section allows certain administrative responsibilities such as the ability to add/edit people from the application and view the status history of the application. Functionality is based on your system role.





Related Items (Progress and Final Reports)

The Related Items section is where you will find items that are related to an application or grant. An example of a related item would be a Progress and Final Report.



CG Application Menu - Related Items

The various sections below can link to items that are associated with this document.

Document Information: CGA-2011-KOMEN_TX100-KOMEN_TX100 Test Org 1-00036

Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	CG Application	KOMEN_TX100 Test Org 1	Project Director	Application In Progress	02/01/2011 - N/A N/A

Related Documents

Sort search results by: -- Select -- GO

Document Type	Name	Current Status	Created By	Last Modified By

Related Messages

Sort search results by: -- Select -- GO

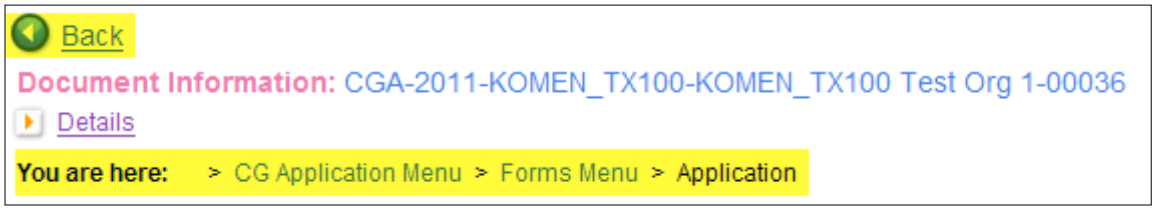
Priority	Sender	Subject	Date/Time	Status

System Functionality

Forms Navigation

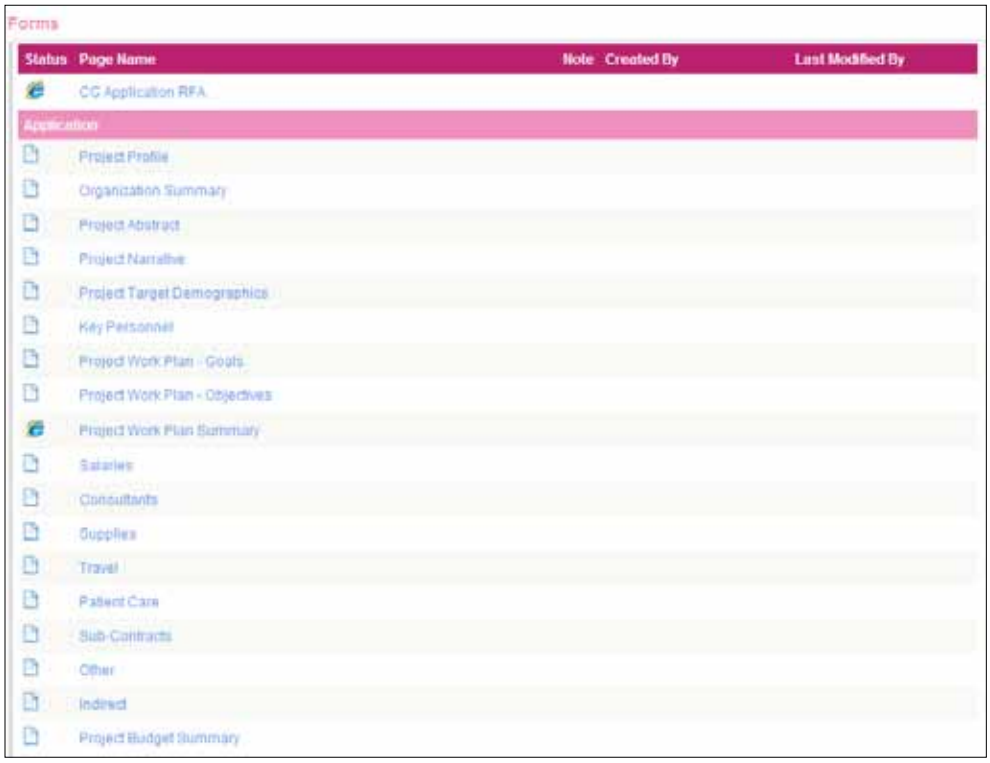
There are three basic methods for navigating through the forms of your application. You may either use the “Back” link at the top of any page within the application, the breadcrumb links just below the “Back” link, or the links listed in the “Forms” section at the bottom of the page.

The image shown below is the “Back” link with the “You are here” breadcrumb trail below it. These two tools will be commonly used when navigating through the various pages of your application.



Note that the “Back” button in the system is different than your internet browser back button. Be sure you are using the system button and not your browser’s.

The “Forms” navigation tool can be found at the bottom of the page. To access the form simply click on the page name.

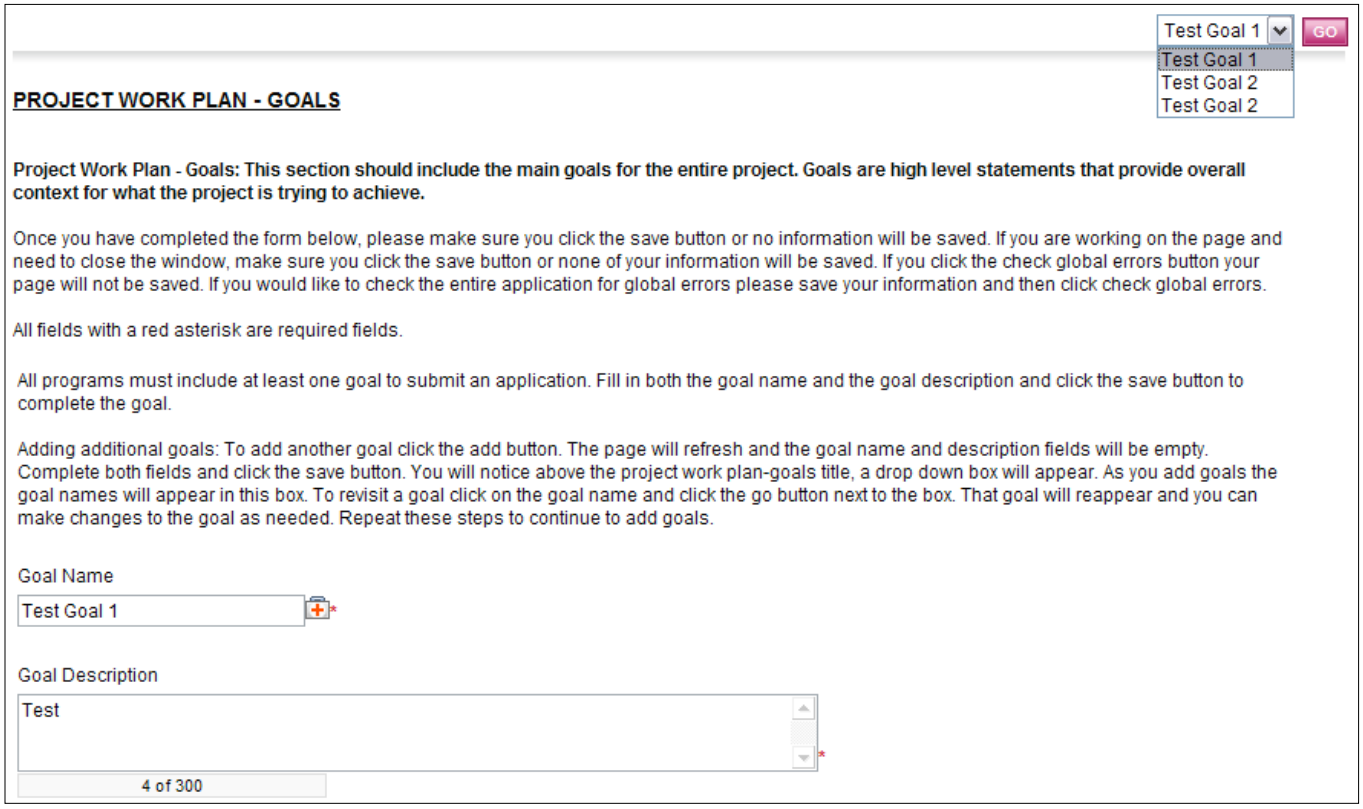


Form Completion

When filling out an application form it is suggested that you first complete all of those fields for which you have information. Not everyone in each organization will have all of the information necessary to complete each form. Complete as much of it as you can and then click the "Save" button. Fields followed by red asterisks are required fields.

In the creation of some forms the "Add" button is used to create additional forms so the applicant can list each item that falls under a particular category. Project Work Plan — Goals, for example, would consist of more than one item. Any form that has an "Add" button allows you to have multiple instances of that form. The following picture shows the available "Add" button on a page where multiple pages can be created.

When multiple pages have been created for a particular form, you can choose between them. A dropdown will appear on the far right of the button toolbar. Select the Item and hit the "Go" button and it will take you to that item's page.



When additional pages have been created, a number in parentheses will appear after the form name to indicate the number of pages connected with the particular link. MultiPage forms will not display a Created By or Last Modified By name/date.

Automatic Calculations

When possible, **the Komen GeMS system will automatically calculate totals for you.** Click the "Save" button to perform calculations — calculations will not occur until the "Save" button is selected.

Name of Consultant	Agency Affiliation if Applicable	Hourly Rate	# of Hours	Total
Joe Smith	Test Affiliate	25	40	
John Doe	Test Affiliate	30	35	
Amy Joe	Test Affiliate	40	31	
			Totals:	

Name of Consultant	Agency Affiliation if Applicable	Hourly Rate	# of Hours	Total
Joe Smith	Test Affiliate	$25	40	**$1,000**
John Doe	Test Affiliate	$30	35	**$1,050**
Amy Joe	Test Affiliate	$40	31	**$1,240**
			Totals:	**$3,290**

The "Budget Summary" page is an example of automatic calculations. When the Budget Summary is opened, the system will take the values that you have entered in the Budget pages and display the information in the Budget Summary.

From Other Sources

	Requested from Komen	Cash	In Kind	Total Required
Salaries and Fringe	$11,075			$11,075
Consultant Costs	$3,290			$3,290
Supplies	$0			$0
Travel	$5,000	$200		$5,200
Patient Care Costs				
Screening	$735			$735
Diagnostics	$15,812			$15,812
Treatment	$1,558			$1,558
Transportation	$113			$113
Subcontracts	$6,715			$6,715
Other	$2,500			$2,500
Subtotal – Direct Costs	**$46,798**	**$200**	**$0**	**$46,998**
Indirect Costs	$0			$0
Total:	**$46,798**	**$200**	**$0**	**$46,998**

All dollar amounts entered must be whole numbers.

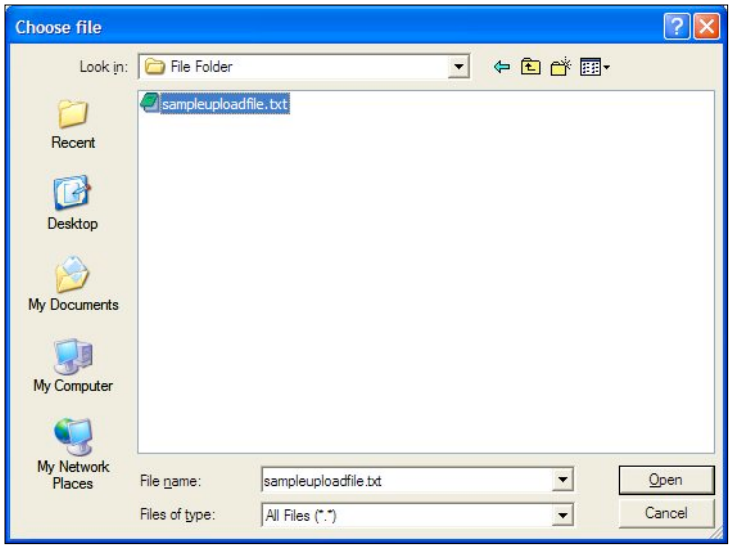
Error Messages

If any required field is not completed within an application form or are in between rules and violated business rules violated, an error message will be displayed in red across the top of the page immediately after the "Save" button is clicked. During form completion it is not necessary to correct errors right away. You may return to the form at a later time and fix errors. If for some reason any errors remain when you attempt to submit the application, you will receive an error message. The Komen GeMS system will require the errors be fixed before the application submission can be completed. See the example below.

Uploads & Attachments

For some pages, form fields are not enough to capture the type of information that may be required. In those situations, a file upload field may be provided to allow you to upload a file instead. Files of the following types are allowed as uploads: bmp, doc, docx, gif, jpg, pdf, png, ppt, tif, txt, wpd, xls and xlsx. To upload a file, click the "Browse" button. Uploads should be 4 mgs or less.

Browse to the folder that contains the file you would like to upload and either double-click the file or click the file and then click the "Open" button.



After the page reloads, you must then click the page "Save" button to save the uploaded file.

PDF Version

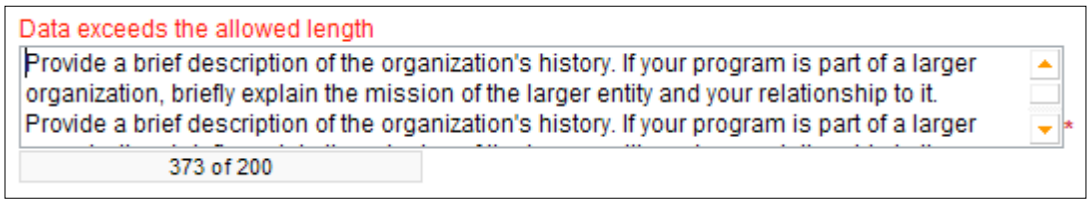
In many pages, once the page is saved, a "Print Version" button will be available that will automatically create a PDF for you with the data that you provided for each form. These dynamic PDF's can be printed, or saved to your computer for reference.

Copy and Paste

Applicants should be cautious when utilizing copy and paste. We suggest you copy to NotePad first then to GeMS. Copying to NotePad will remove all formatting.

Text Limit

Applicants must also be aware of the character limits of each text box, as attempting to copy and paste text that is larger than the allotted amount of space will yield an error. The character limit may be found at the bottom left of each text box.



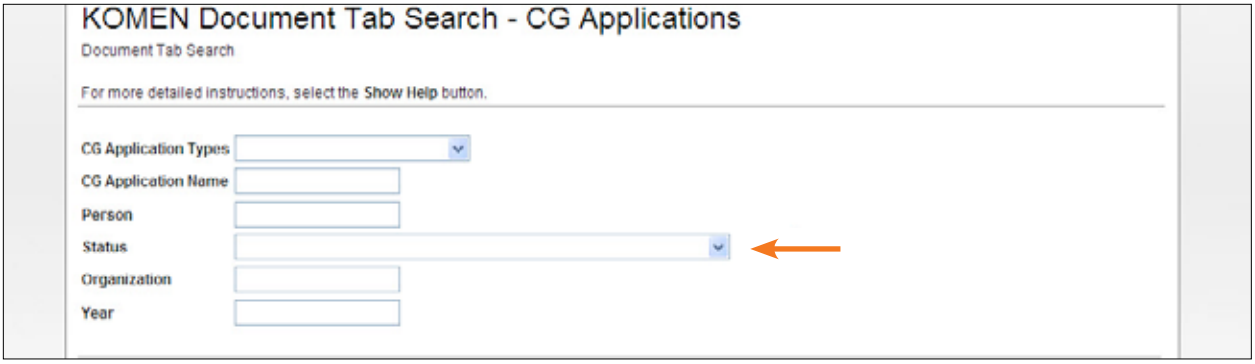
Note: If you exceed the allowed length; **do not exit the document until you have edited it down** to the allowed text limit; otherwise your text will be lost.

Application Revision

If your organization is required to make revisions to your application before final funding can be approved, follow these steps:

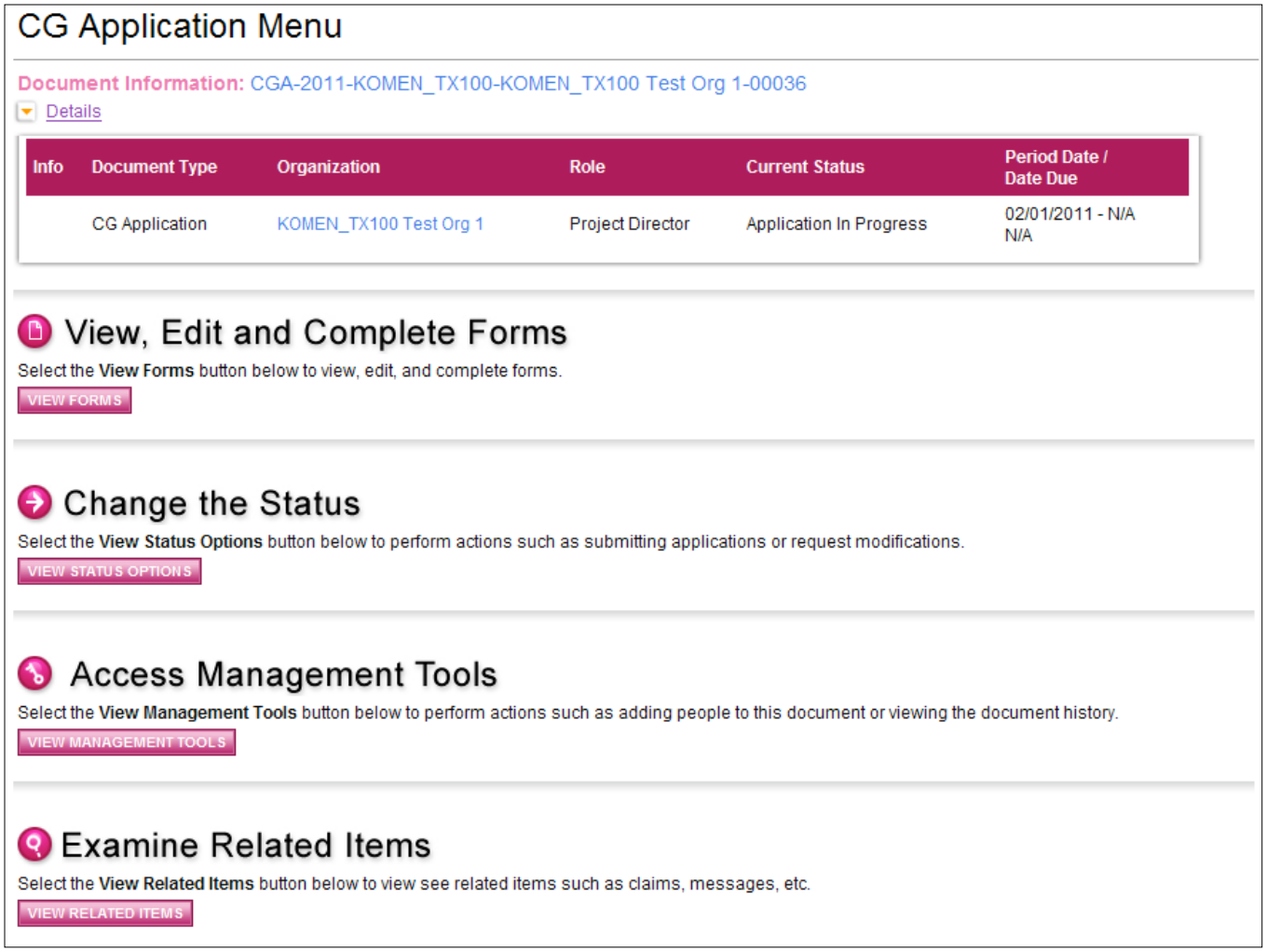
1) From the User Homepage, click the "My CG Applications" tab at the top of the page.

2) Search for all applications in the status "Budget Revisions Required".



3) Select the application name for the project in which revisions are required.

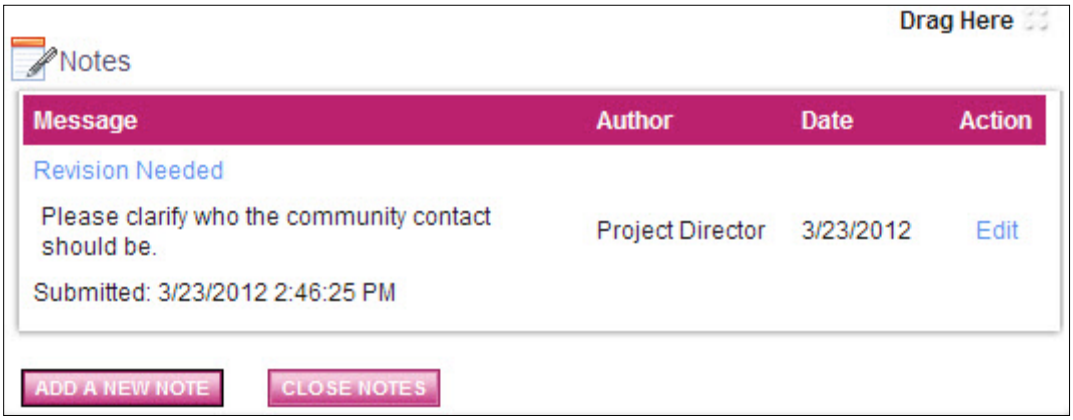
4) From the CG Application Menu, select “View Forms” below “View, Edit and Complete Forms”.



5) The pages of the application that need revisions made to it will be marked with a notepad. Select the notepad next to the page you plan to revise.

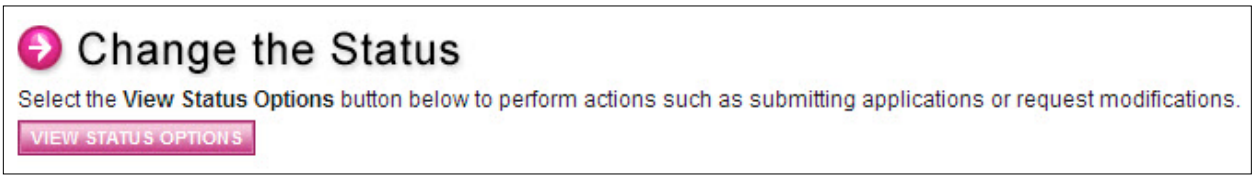
6) Select the "Show Notes" section at the top of the page.

7) Review the notes provided by the Affiliate and make any necessary changes.

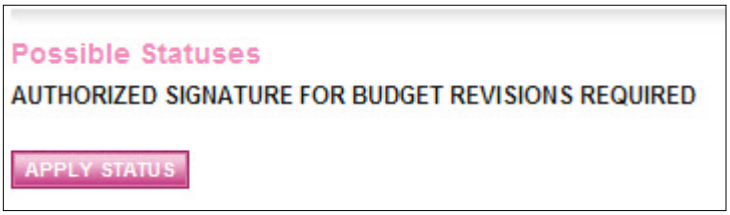


8) Repeat steps 5-7 for all pages marked with notes.

9) Once all revisions are completed, return to the application menu and select "View Status Options" under change the status



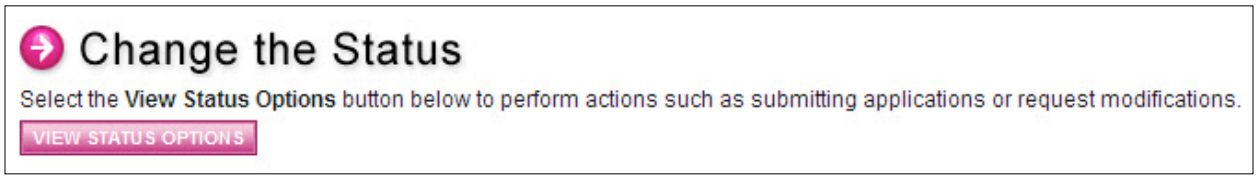
10) Select “Apply Status” under Authorized Signature for Budget Revisions Required.



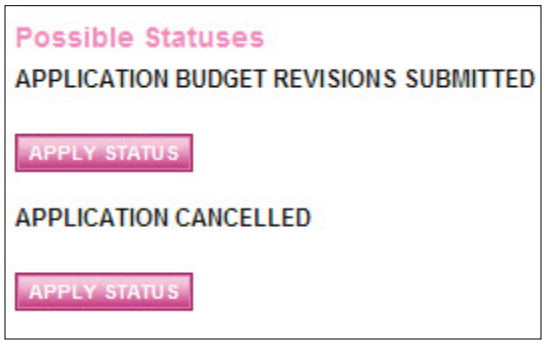
11) Authorized Signer logs in to GeMS and click “Open my tasks”.

12) Select the report you would like to submit from the My Task list.

13) Click “View Status Options” toy to see possible statuses.



14) Click “Apply Status” for Application Budget Revisions Submitted.



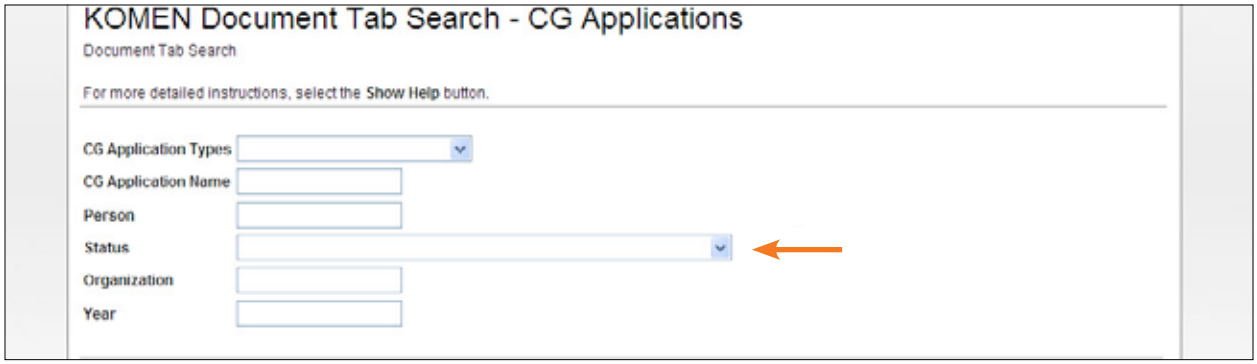
Contract Acceptance

Accepting the Contract

The Authorized Signer is the only system user permitted to accept the contract for an organization's application. In order to accept the contract, follow these steps:

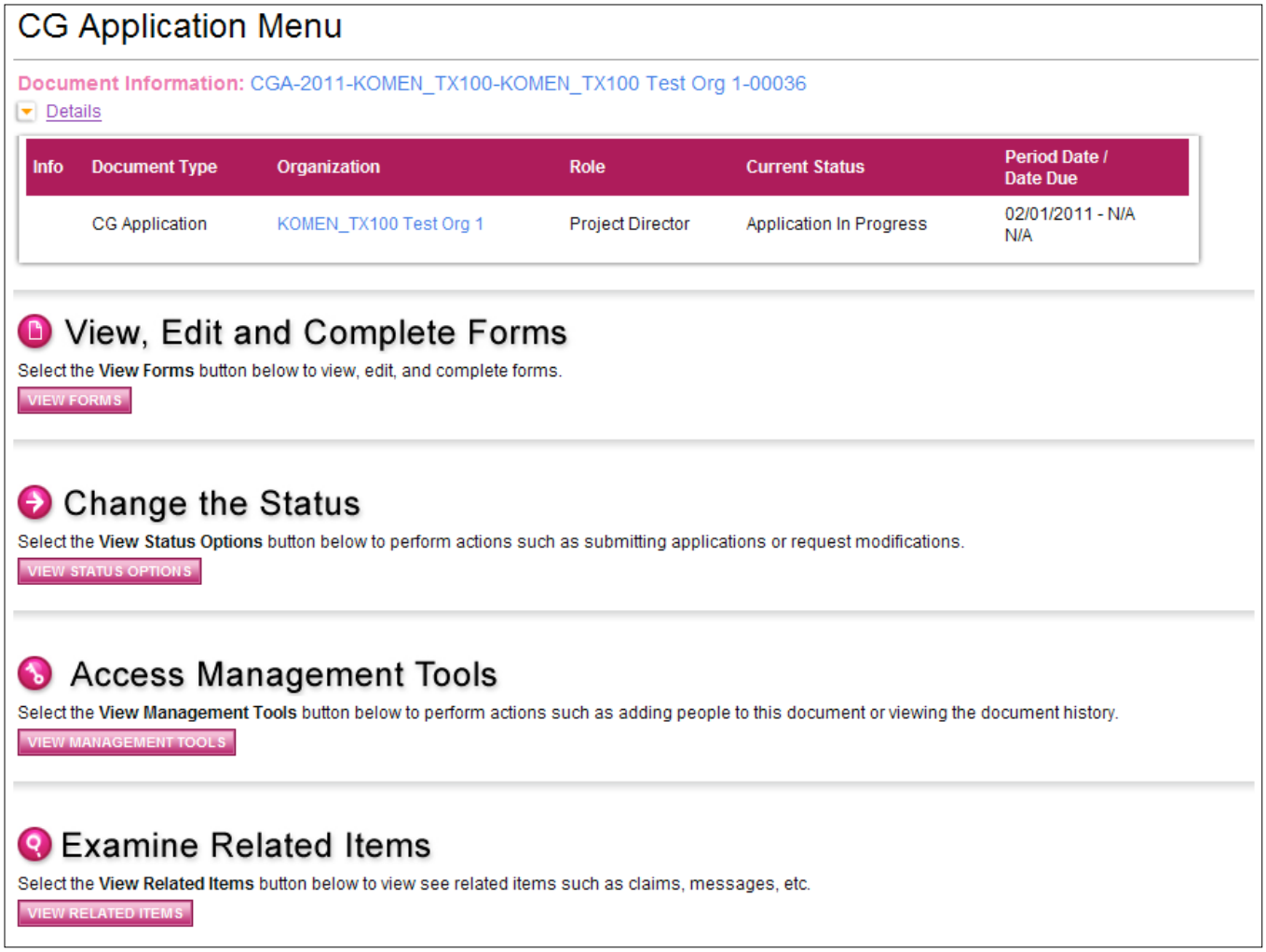
1) From the User Homepage, click the "My CG Applications" tab at the top of the page.

2) Search for all applications in the status "Contract Acceptance Required".



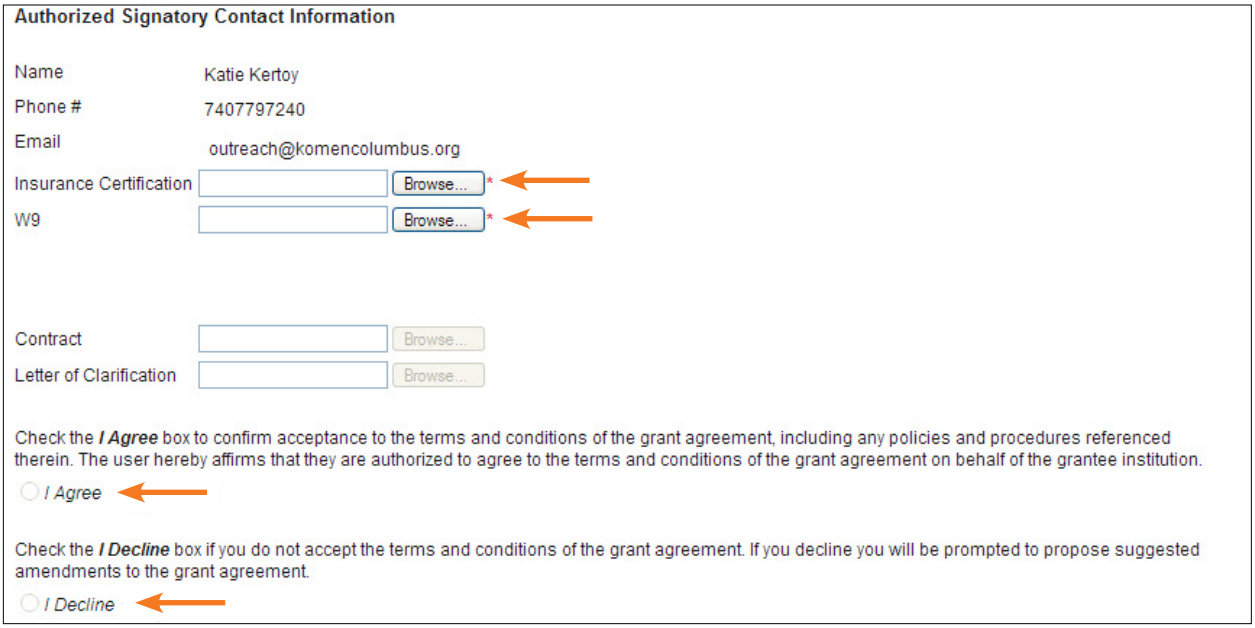
3) Select the Application name for the project the contract is being reviewed for.

4) From the CG Application Menu, select “View Forms” below “View, Edit and Complete Forms”.

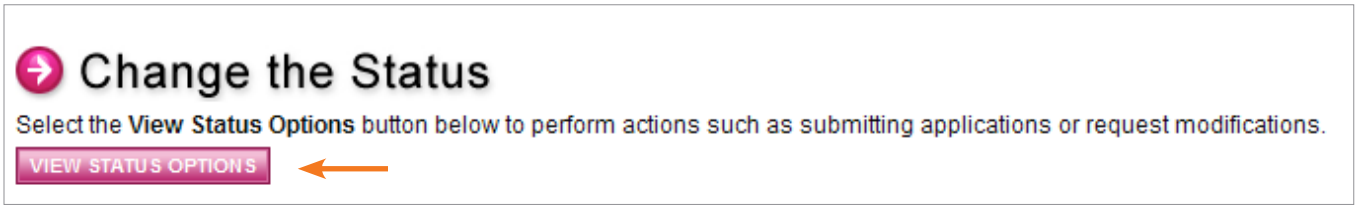


5) Select the “Contract Acceptance” page from the application page list.

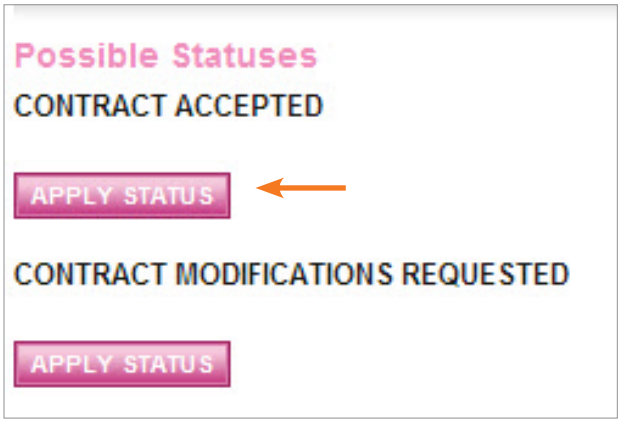
6) Complete the "Contract Acceptance" page. At this time the Insurance Certification and W9 must be uploaded and the contract must be accepted or declined.



7) If the contract is accepted, return to the application menu and select "View Status Options" under Change the status.



8) Select "Apply Status" under Contract Accepted.

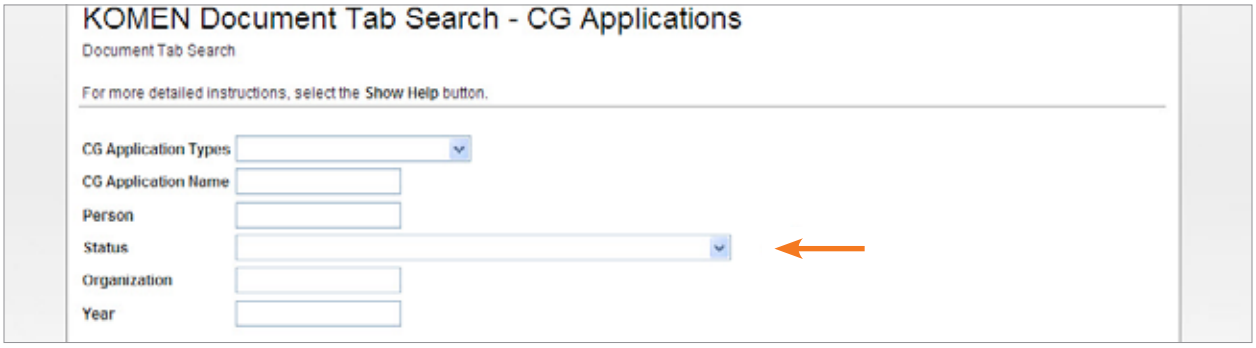


Declining the Contract / Contract Modifications

The Authorized Signer is the only system user permitted to decline the contract for an organization's application. In order to decline the contract, follow these steps:

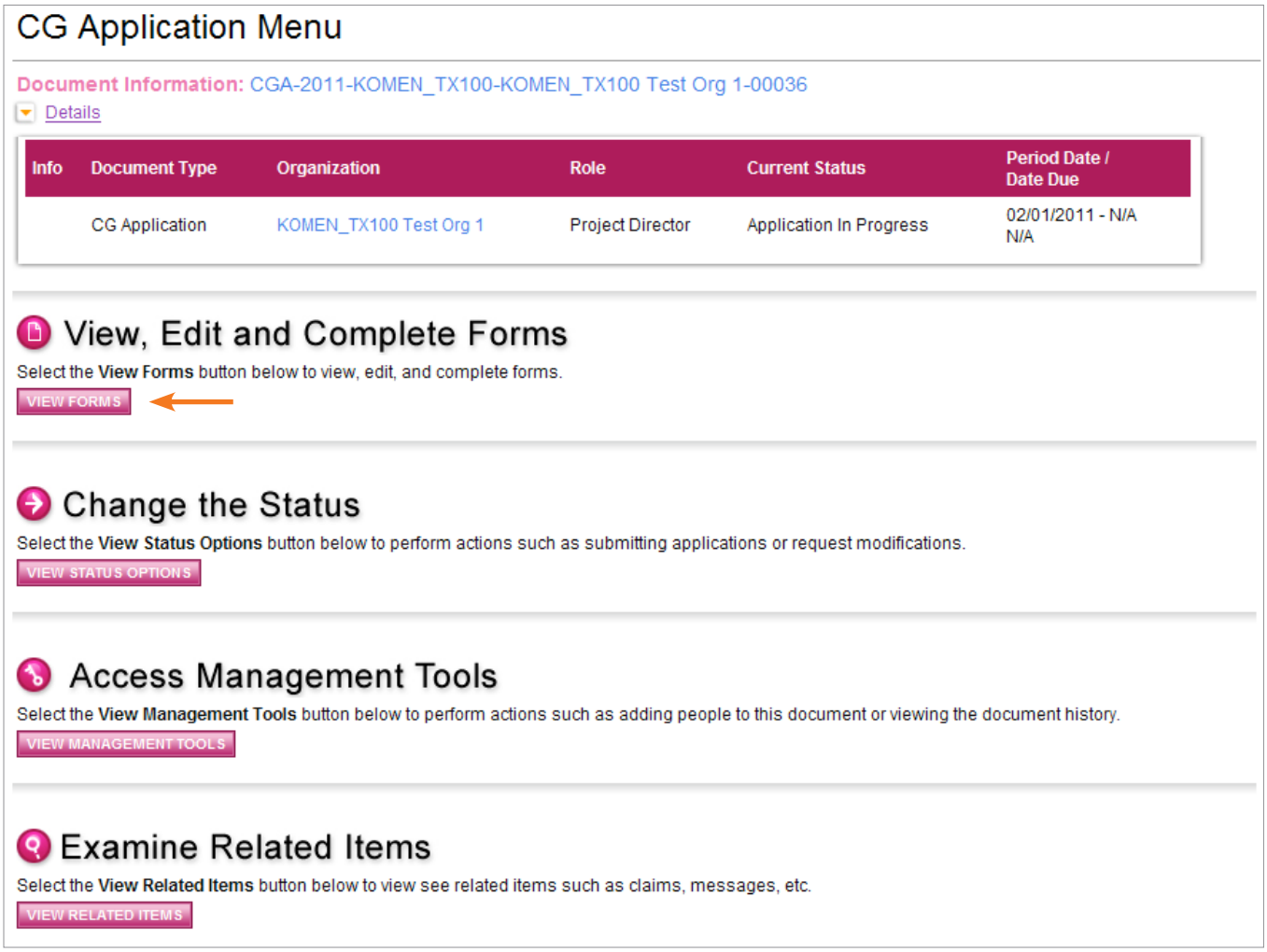
1) From the User Homepage, click the "My CG Applications" tab at the top of the page.

2) Search for all applications in the status "Contract Acceptance Required".



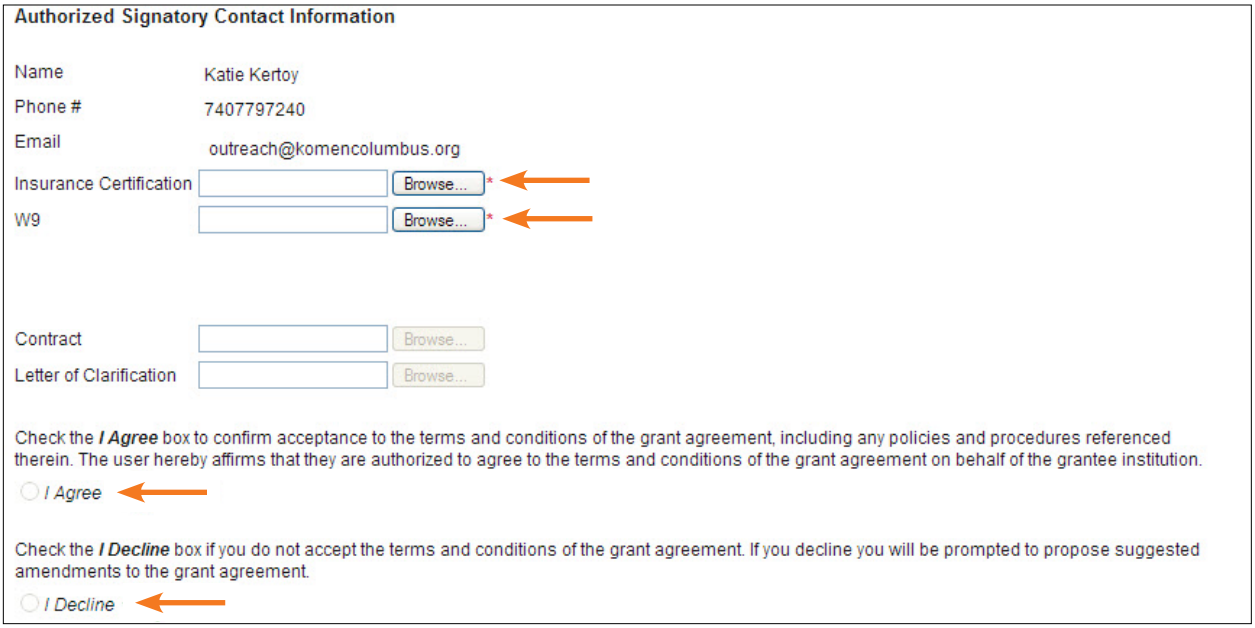
3) Select the Application name for the project the contract is being reviewed for.

4) From the CG Application Menu, select “View Forms” below “View, Edit and Complete Forms”.

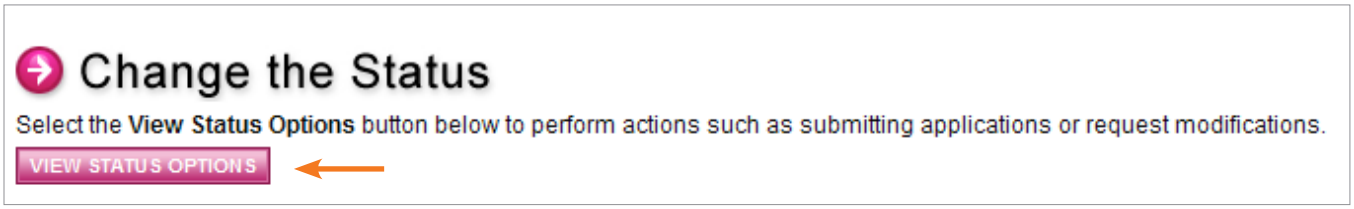


5) Select the “Contract Acceptance” page from the application page list.

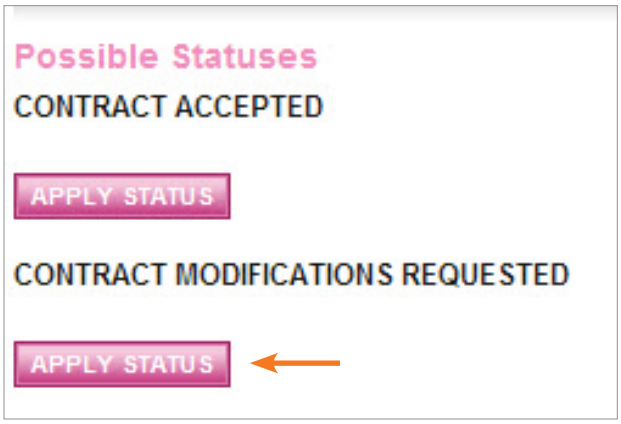
6) Complete the "Contract Acceptance" page. At this time the Insurance Certification and W9 must be uploaded and the contract must be accepted or declined.



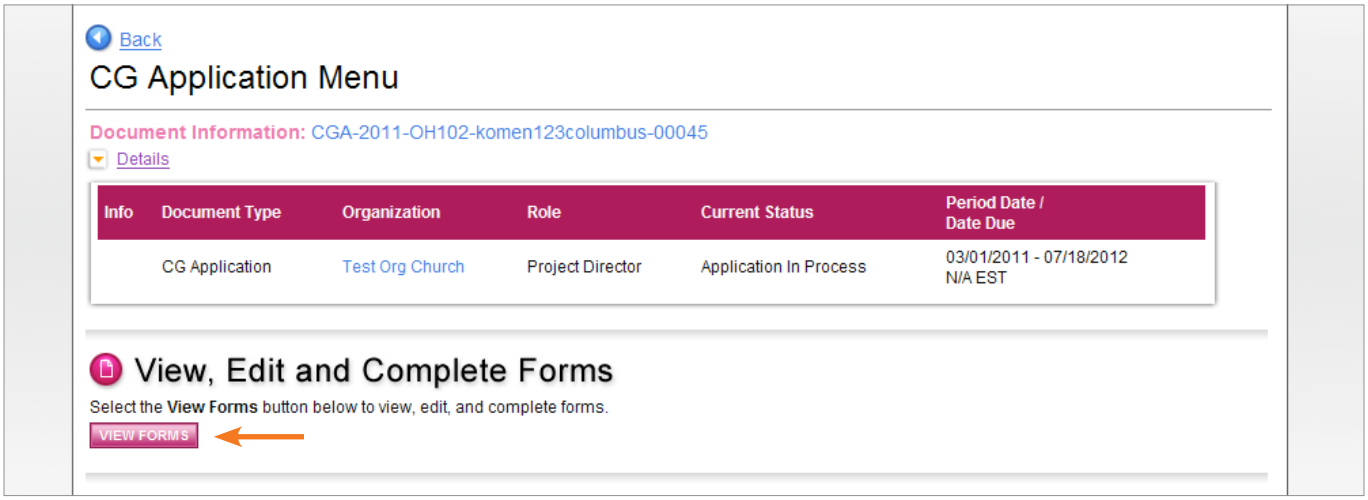
7) If the contract is declined, return to the application menu and select "View Status Options" under Change the status.



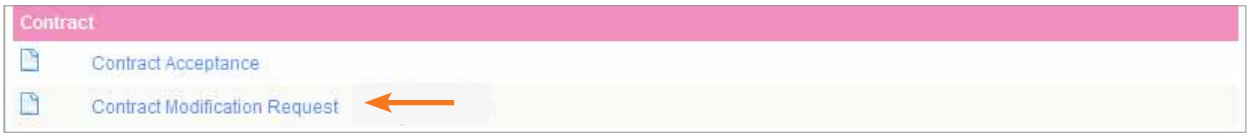
8) Select "Apply Status" under Contract Modifications Requested.



9) Return to the application menu. Select "View Forms" under View, Edit, and Complete forms.

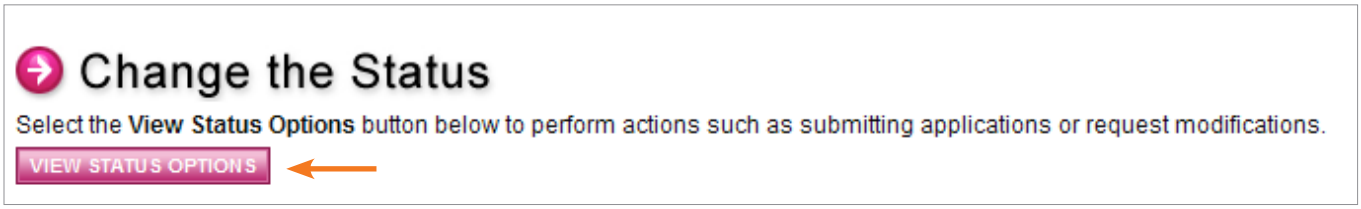


10) Select the "Contract Modification Request" page from the application page list.



11) Complete the "Contract Modification Request" page. At this time input any change you would like to make to the contract verbiage. This information will be used to create a letter of clarification for the initial contract.

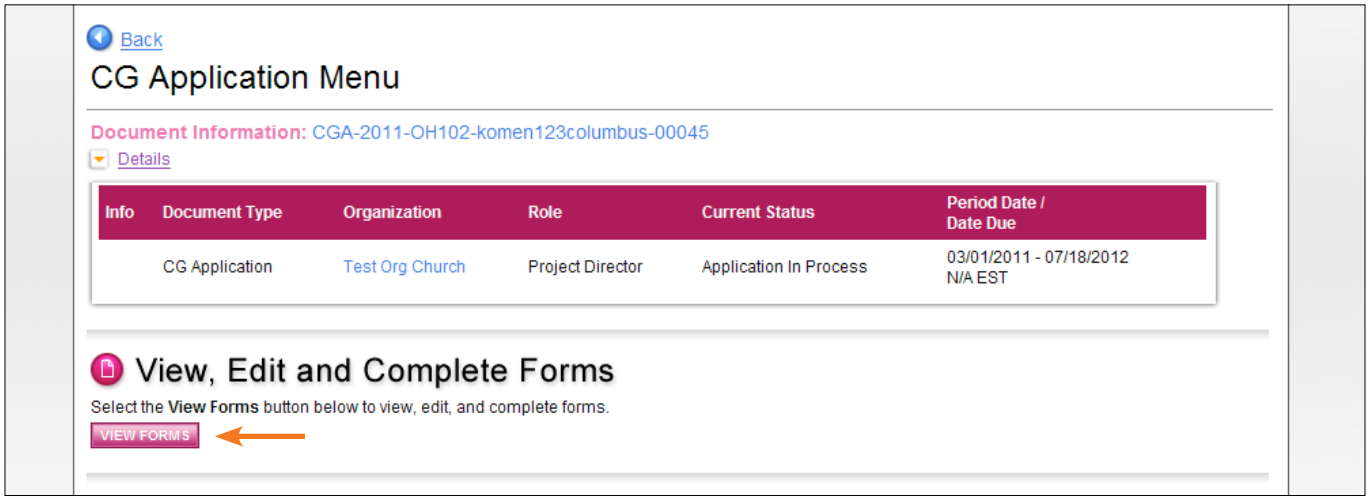
12) Return to the application menu and select "View Status Options" under Change the status.



13) Select "Apply Status" under Contract Modifications Submitted.

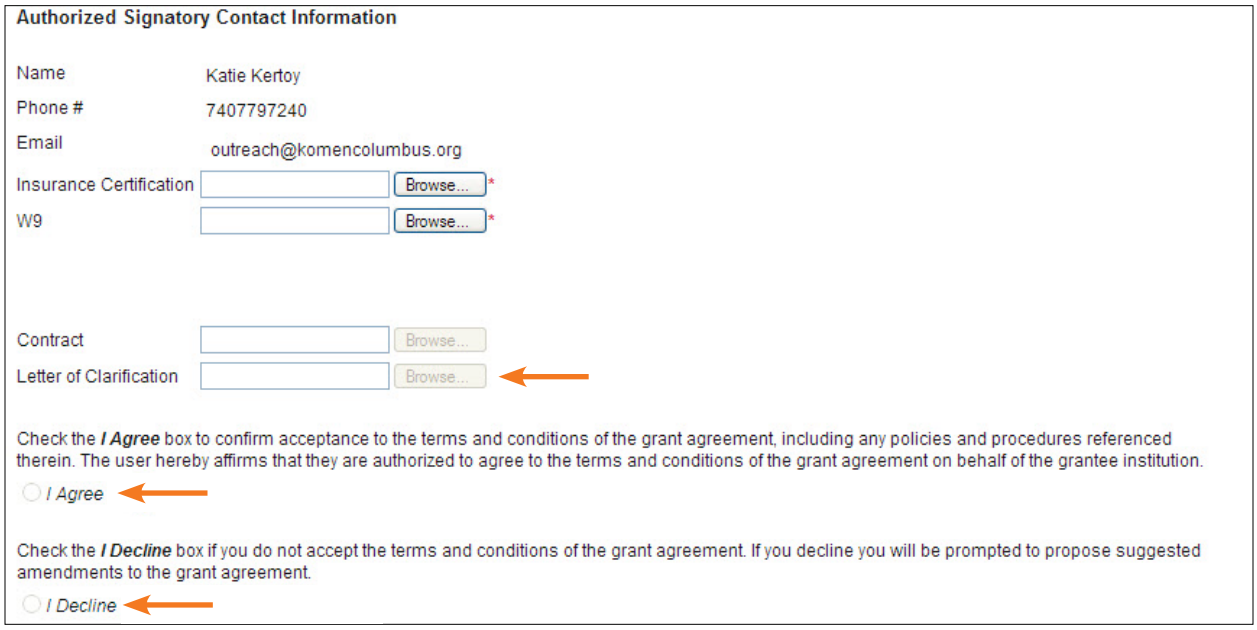
Now the Affiliate will review the proposed modifications and accept or submit their revisions.

14) Once you have been notified that the application is again in the status of "Contract Acceptance Required" return to the application menu. Select "View Forms" under View, Edit, and Complete forms.

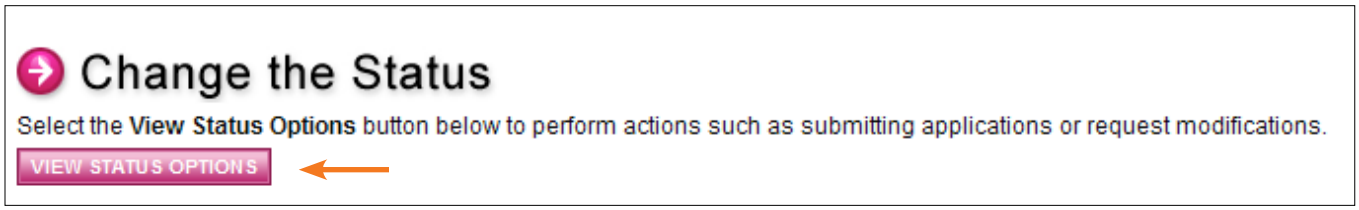


15) Select the "Contract Acceptance" page from the application page list.

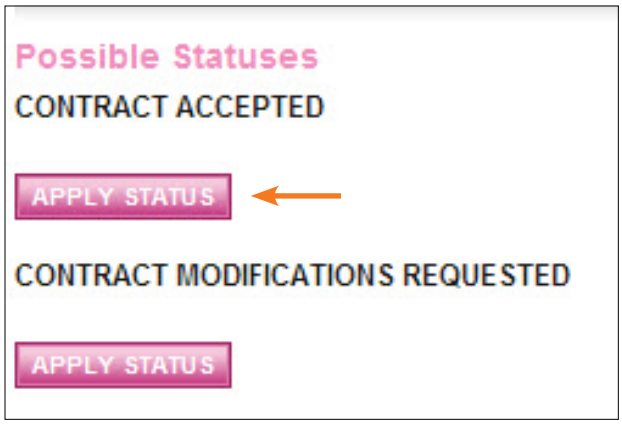
16) Complete the "Contract Acceptance" page. There will now be a letter of clarification available as an attachment to the initial contract.



17) If the contract and letter of clarification are accepted, return to the application menu and select "View Status Options" under Change the status.



18) Select "Apply Status" under Contract Accepted.



If your organization proposes more contract Modifications, select 'Apply Status' under Contract Modifications Requested" and the Affiliate will again review the proposed modifications.

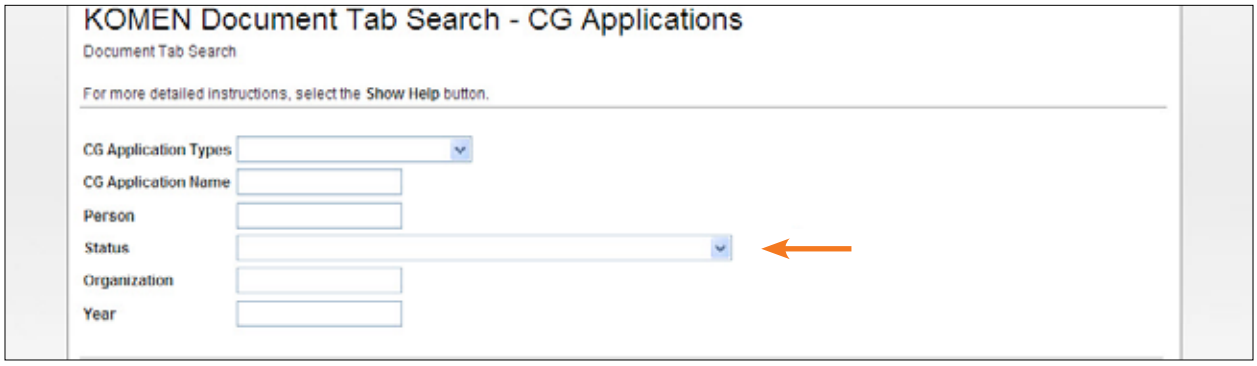
Progress and Final Report

Report Creation

The Project Director is permitted to create progress and final reports for an organization's application. In order to create the progress and final report, follow these steps:

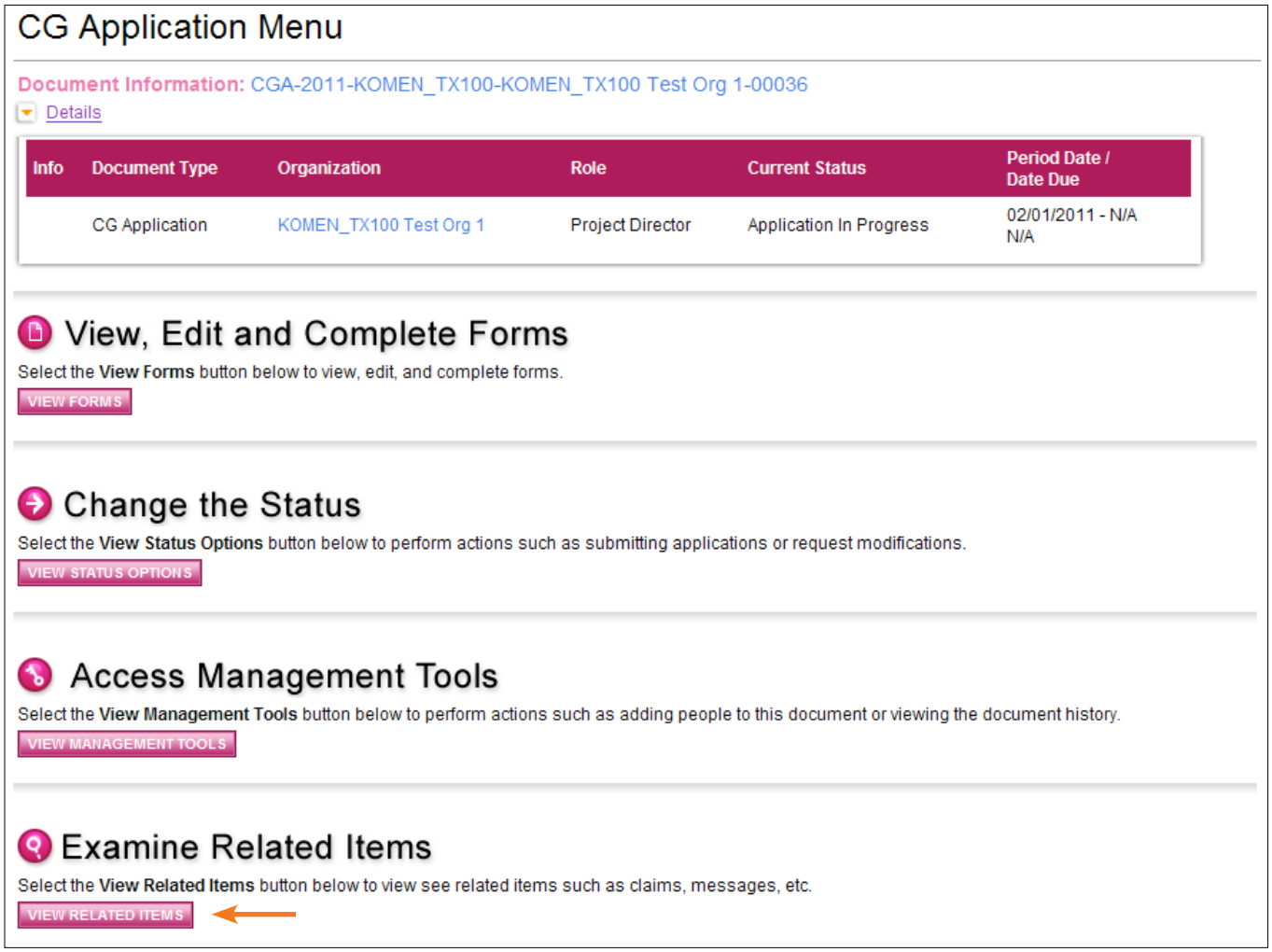
1) From the User Homepage, click the "My CG Applications" tab at the top of the page.

2) Search for all applications in the status "Grant Awarded".



3) Select the Application name for the project the progress or final report will be created for.

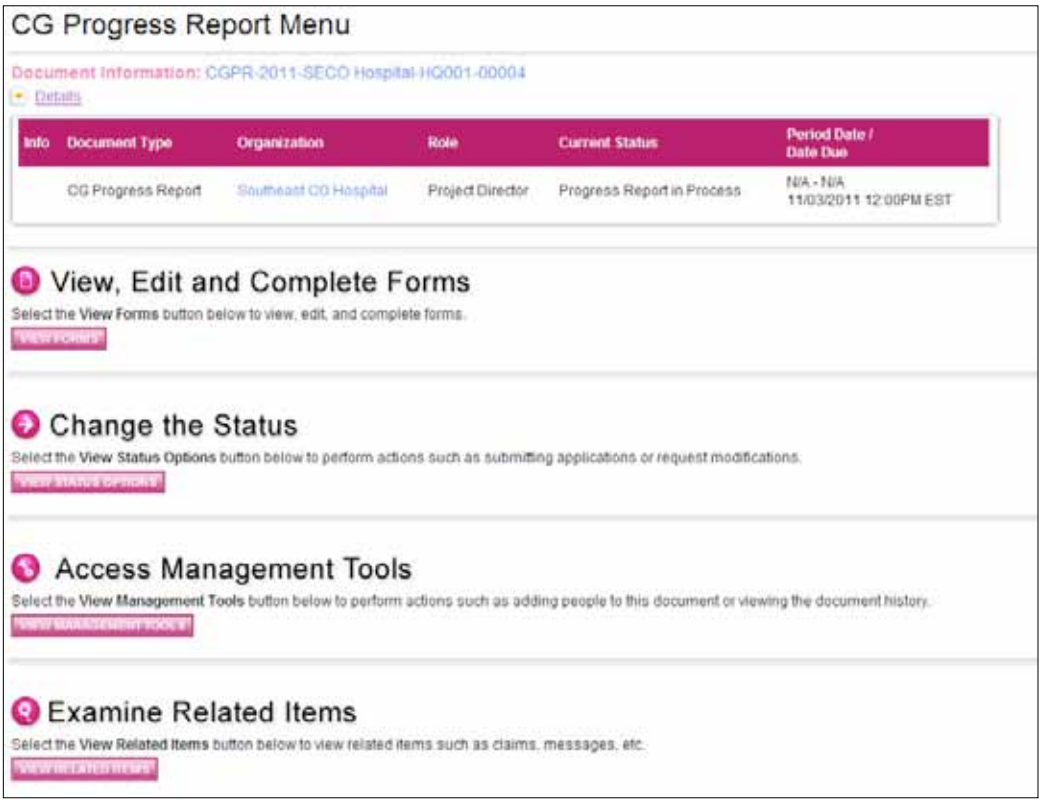
4) From the CG Application Menu, select “View Related Items” below “Examine Related Items”.



5) Select the name of the report you would like to create.

6) Select “I agree” to continue the creation of the report.

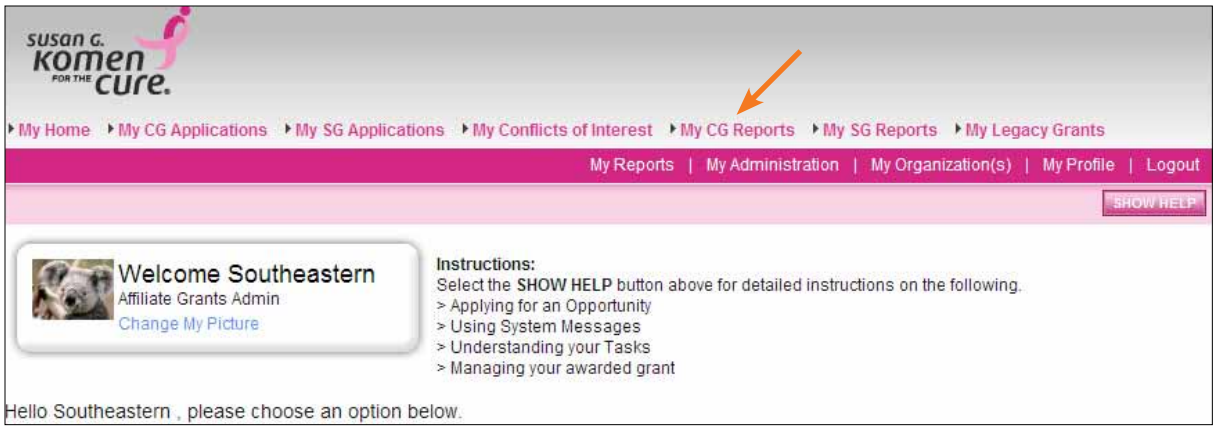
7) The report menu will automatically open at this point.



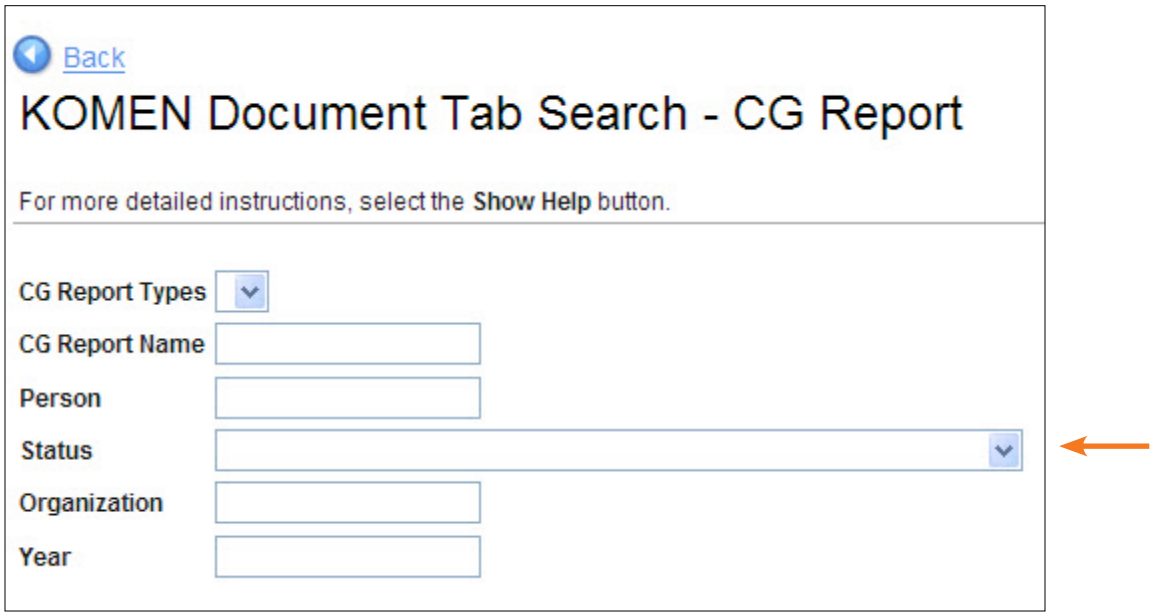
Report Completion

The Project Director, Authorized Signer, and writer roles are permitted to complete reports. In order to complete the progress and final report, follow these steps:

1) From the User Homepage, click the "My CG Reports" tab at the top of the page.

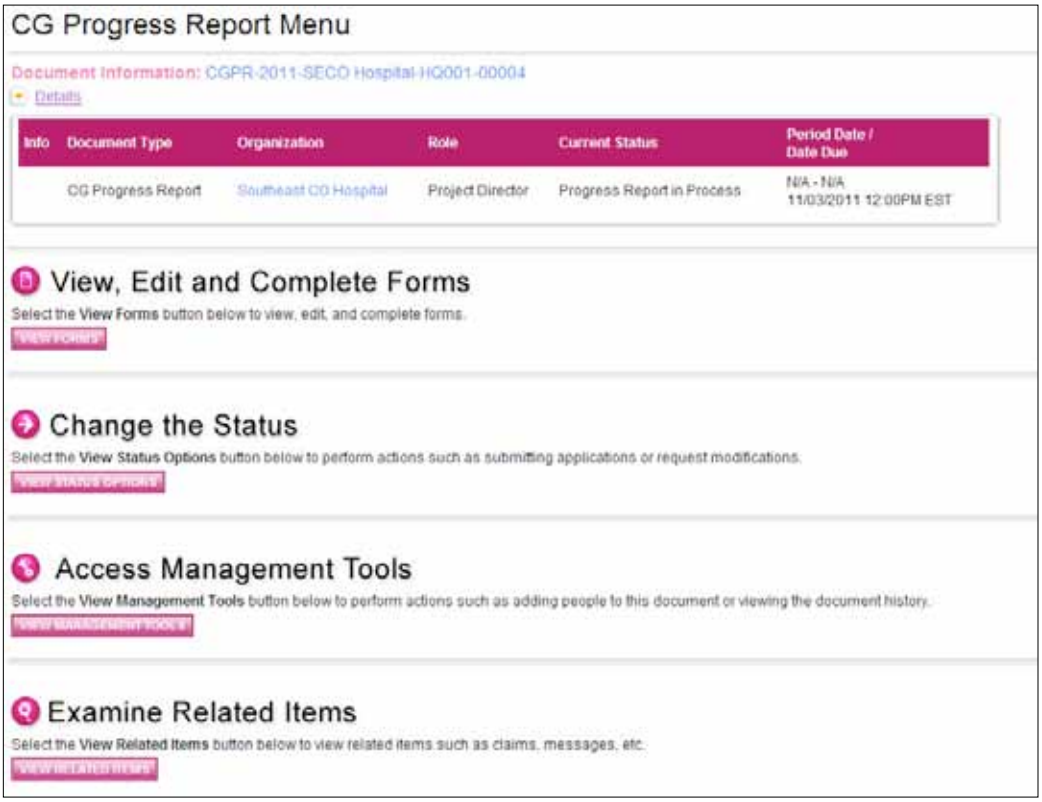


2) Search for all reports in the status "CG Progress Report: Progress Report in Process" or "CG Final Report: Final Report in Process".



3) Select the report name for the project the progress or final report you would like to complete.

4) Select "View Form" under View, Edit and Complete Forms.

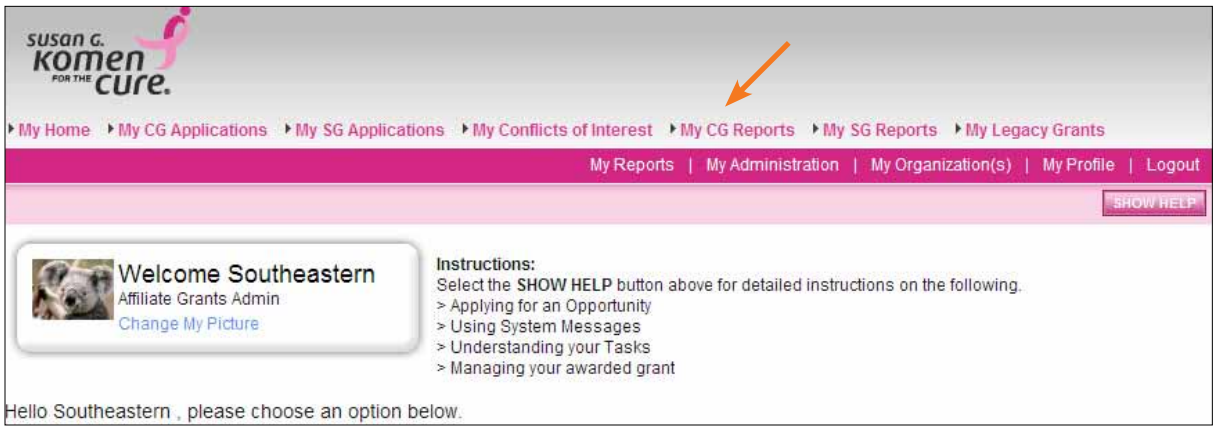


5) Complete all of the report forms.

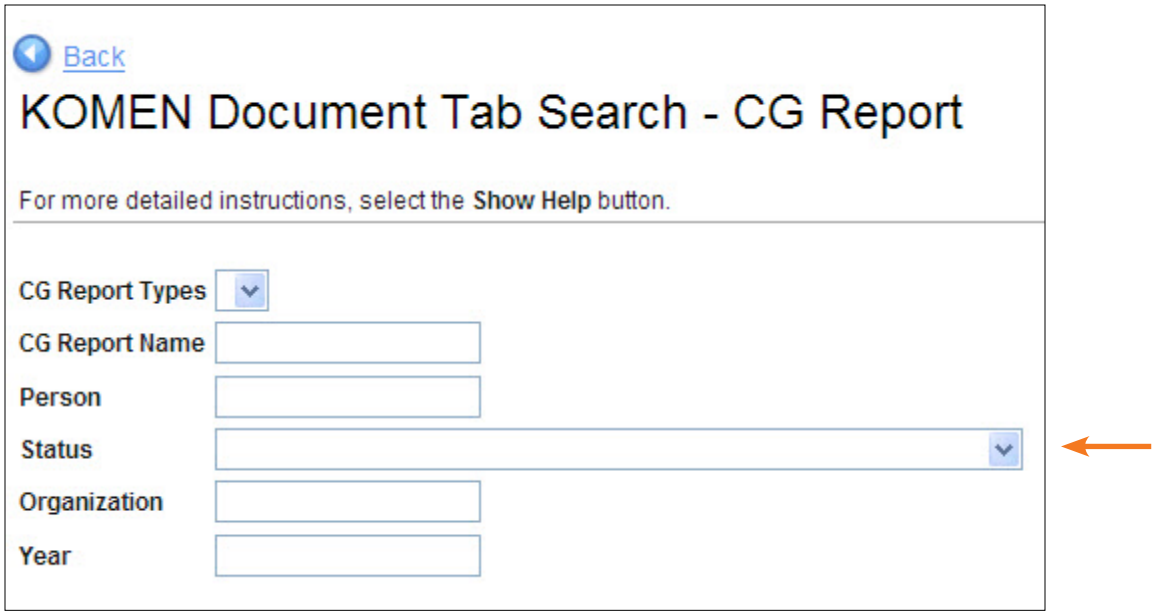
Report Submission

The Project Director must change the status of the report to "Authorized Signature Required" to begin the report submission process. After the Project Director has changed the report status, the Authorized Signer must finalize the submission by changing the status to "Report Submitted".

1) From the User Homepage, the Project Director clicks the "My CG Reports" tab at the top of the page.



2) Search for all reports in the status "CG Progress Report: Progress Report in Process" or "CG Final Report: Final Report in Process".



3) Select the report name for the project the progress or final report you would like to complete.

Results

Document Type	Organization	Name	Current Status	Year
CG Progress Report	Aspen Ski Lodge	CGPR-2012-HQ001-SKI-00015	Progress Report in Process	2012

1

4) Select "View Status Options" under Change the Status.

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

VIEW STATUS OPTIONS

5) Click "Apply Status" under Authorized Signature Required.

Possible Statuses

AUTHORIZED SIGNATURE REQUIRED

APPLY STATUS

If any errors exist on any of the report's forms when the Project Director attempts to when the Project Director attempts to change the status to Authorized Signature Required or the Authorized Signer attempts to submit, they will receive an error message directing them to the form(s) with errors. All errors must be fixed before GeMS will allow a report to be submitted. If no errors exist, the grantee will be prompted to confirm his or her submission. You can check for errors at any time using the Global Errors link.

Global Errors

Document Information: CGA-2011-KOMEN_TX100-KOMEN_TX100 Test Org 1-00036

Details

Info	Document Type	Organization	Role	Current Status
	CG Application	KOMEN_TX100 Test Org 1	Project Director	Application In Progress

You must provide written justification for all items requested.;
Consultants

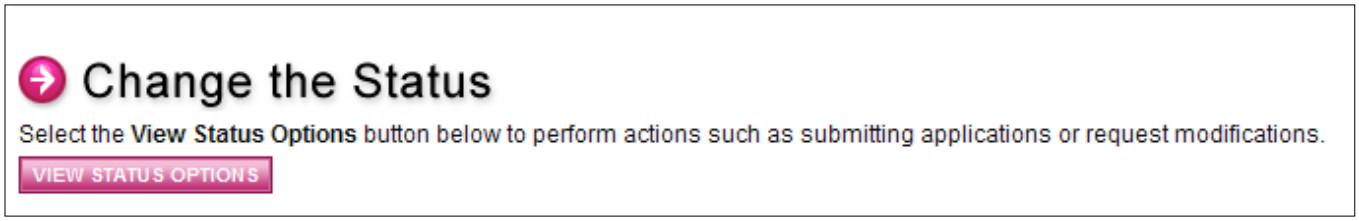
You must complete this page.
Key Personnel

You must provide written justification for all items requested.;
Other

6) Authorized Signer logs in to GeMS and clicks “Open My Tasks.”

7) Select the report that you would like to submit in your task list.

8) Click “View Status Options” to see the possible statuses.



9) Click “Apply Status” for “Report Submitted”.

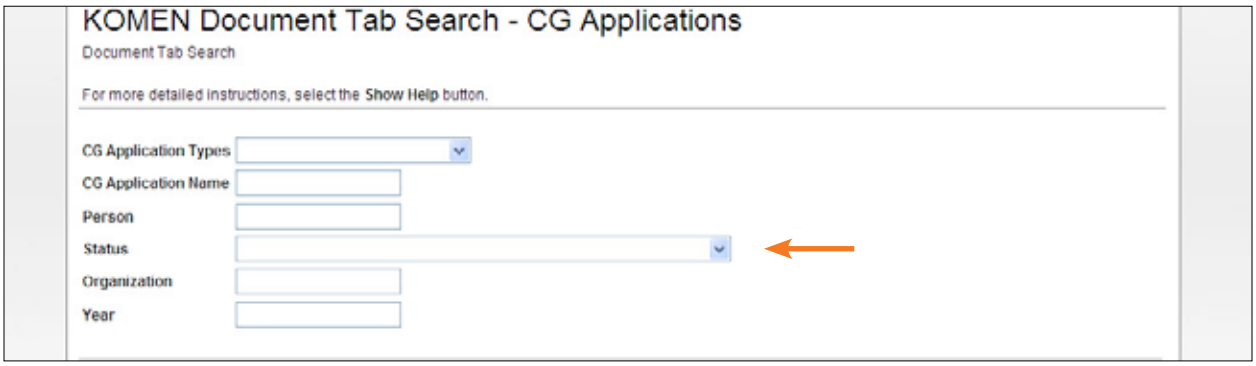
Grant Changes

Amendment Submission

The Project Director is permitted to create amendments for an organization's grant. In order to create the amendment, follow these steps:

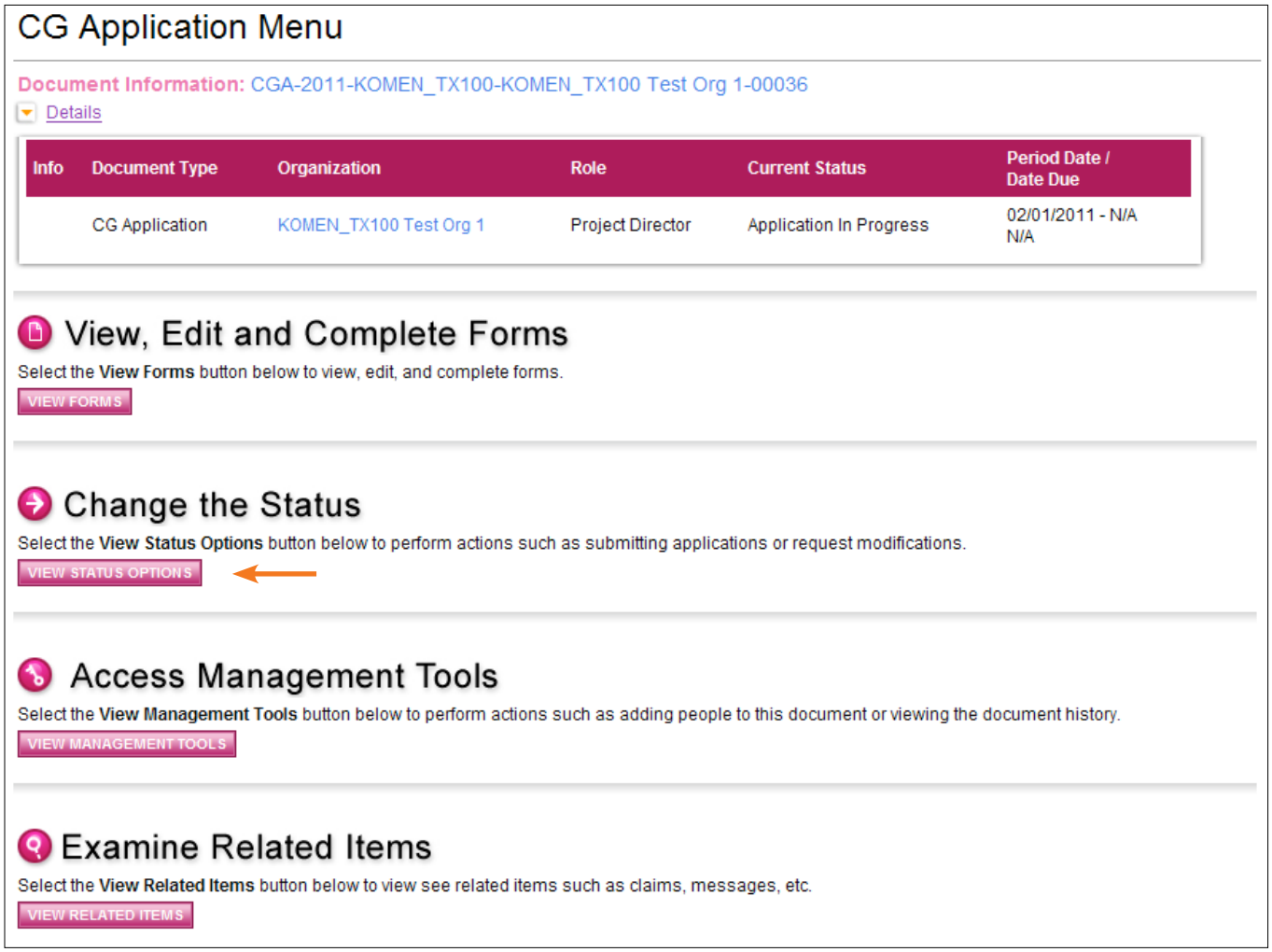
1) From the User Homepage, click the "My CG Applications" tab at the top of the page.

2) Search for all applications in the status "Grant Awarded".

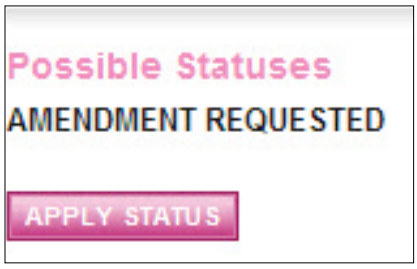


3) Select the Application name for the project the amendment will be created for.

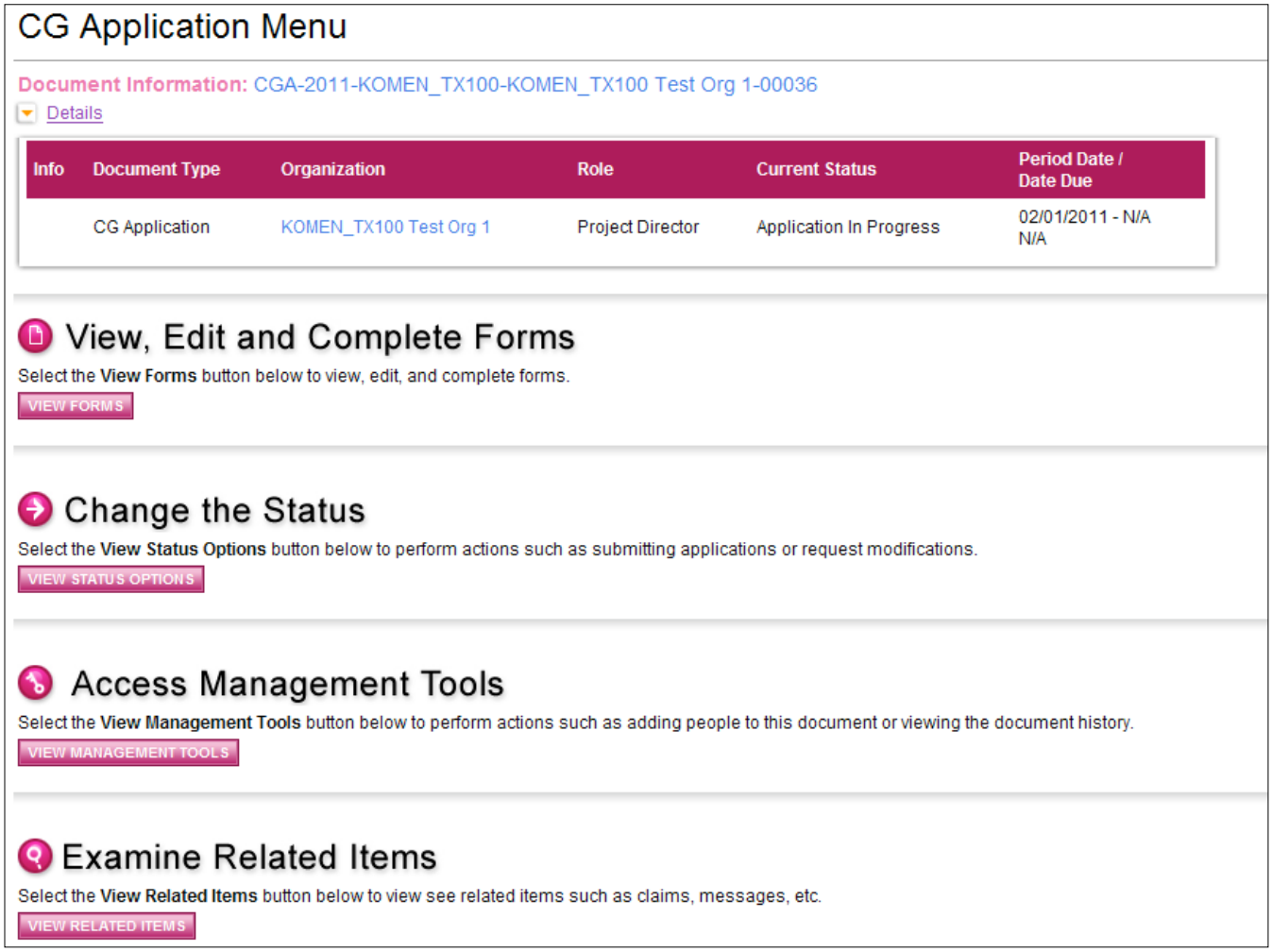
4) From the CG Application Menu, select “View Status Options” below “Change the Status”.



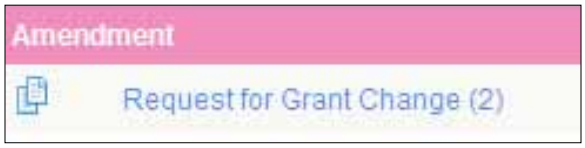
5) Select “Apply Status” under “Amendment Requested”.



6) Return to the Application Menu and select “View Forms” under View, Edit and Complete Forms.

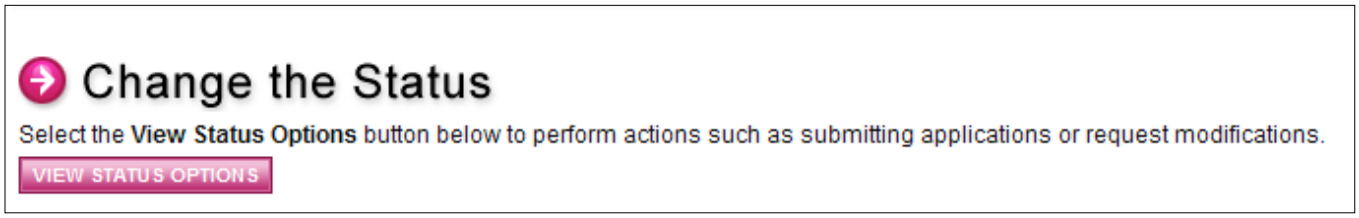


7) Select the “Request for Grant Change” form.

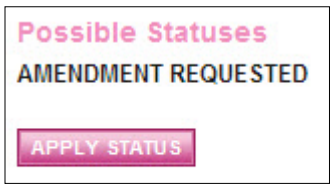


8) Complete and save the “Request for Grant Change” form.

9) Return to the Application Menu and select “View Status Options” under Change the Status.



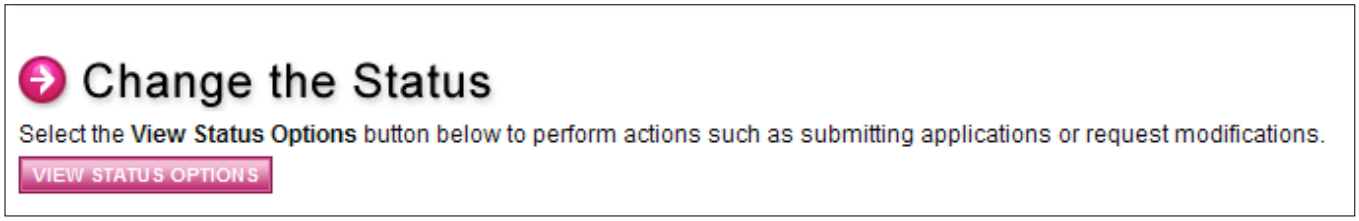
10) Select “Apply Status” under Amendment Requested.



11) Authorized Signer logs in to GeMS and clicks “Open My Tasks.”

12) Select the application amendment that you would like to submit in your task list.

13) Click “View Status Options” to see the possible statuses.



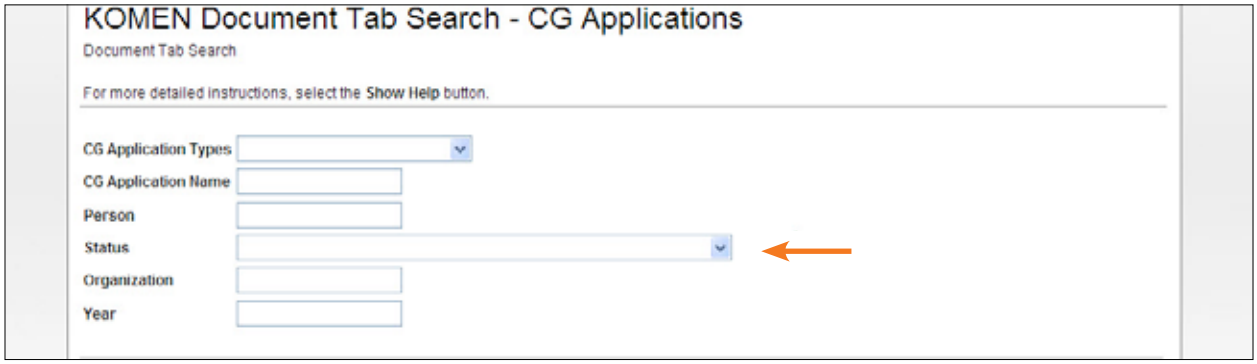
14) Click “Apply Status” for “Amendment Submitted”.

Amendment Resubmission

If your change request is approved, your application will be placed into "Grant Amendment Approved" status. At this time the amendments must be made to the original application and the amendment must be resubmitted. The Project Director is permitted to resubmit amendments for an organization's grant. In order to resubmit the amendment, follow these steps:

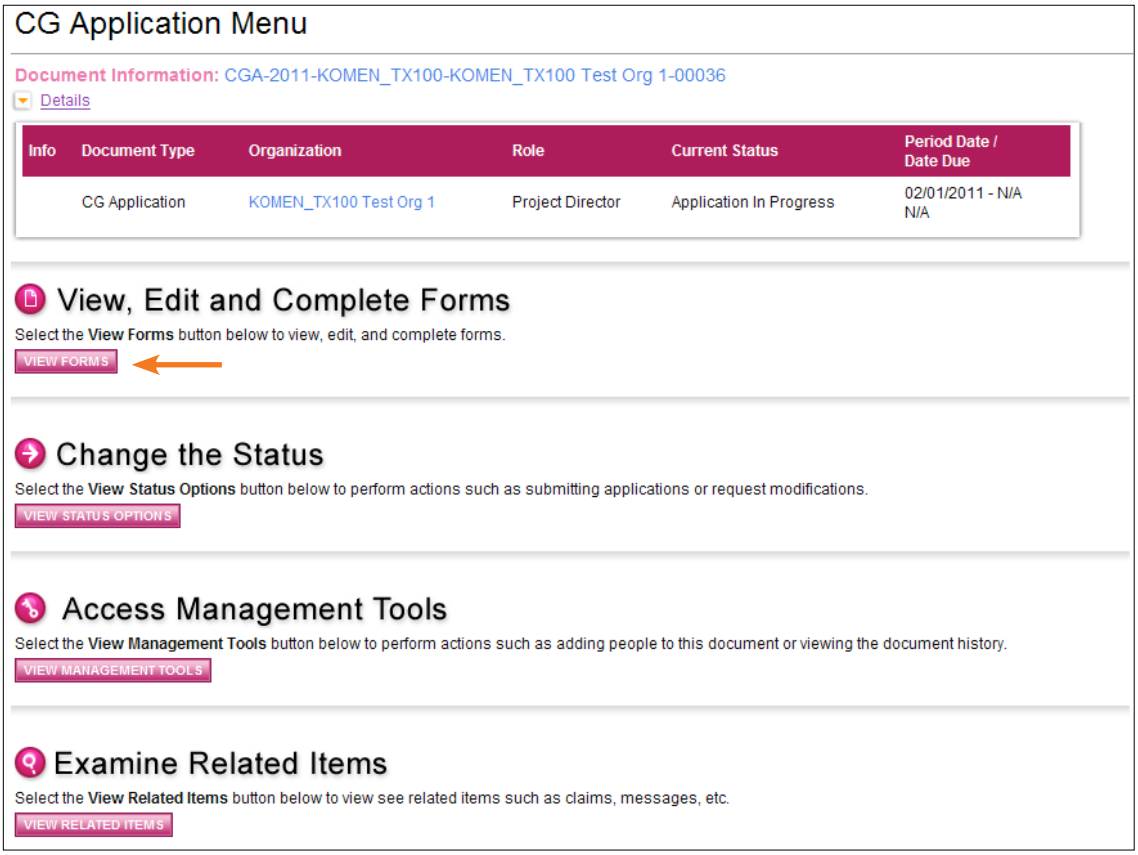
1) From the User Homepage, click the "My CG Applications" tab at the top of the page.

2) Search for all applications in the status "Grant Amendment Approved".



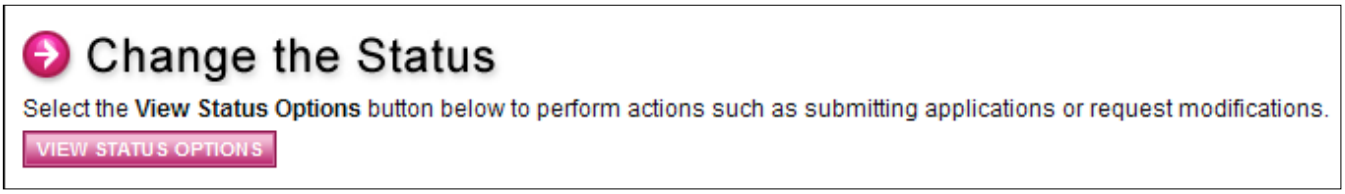
3) Select the Application name for the project the amendment will be created for.

4) From the CG Application Menu, select “View Forms” below “View, Edit and Complete Forms”.



5) Enter the application form and make all necessary changes to the original application.

6) Return to the Application Menu and select “View Status Options” under Change the Status.

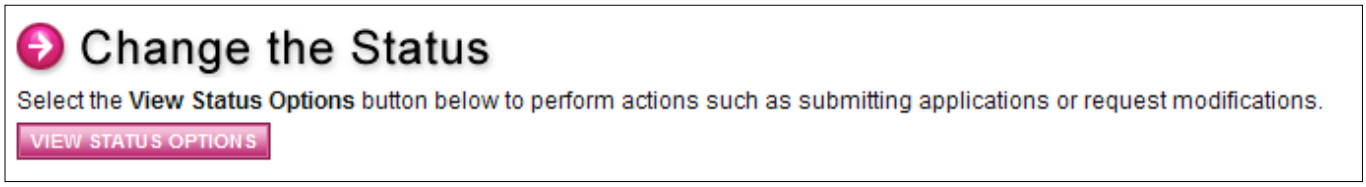


7) Select “Apply Status” under Authorized Signature Needed for Amendment Resubmission.

8) Authorized Signer logs in to GeMS and clicks “Open My Tasks.”

9) Select the application amendment that you would like to resubmit in your task list.

10) Click “View Status Options” to see the possible statuses.



11) Click “Apply Status” for “Amendment Resubmitted”.

Automatic e-Mail Notifications

Automatic E-mail Notifications

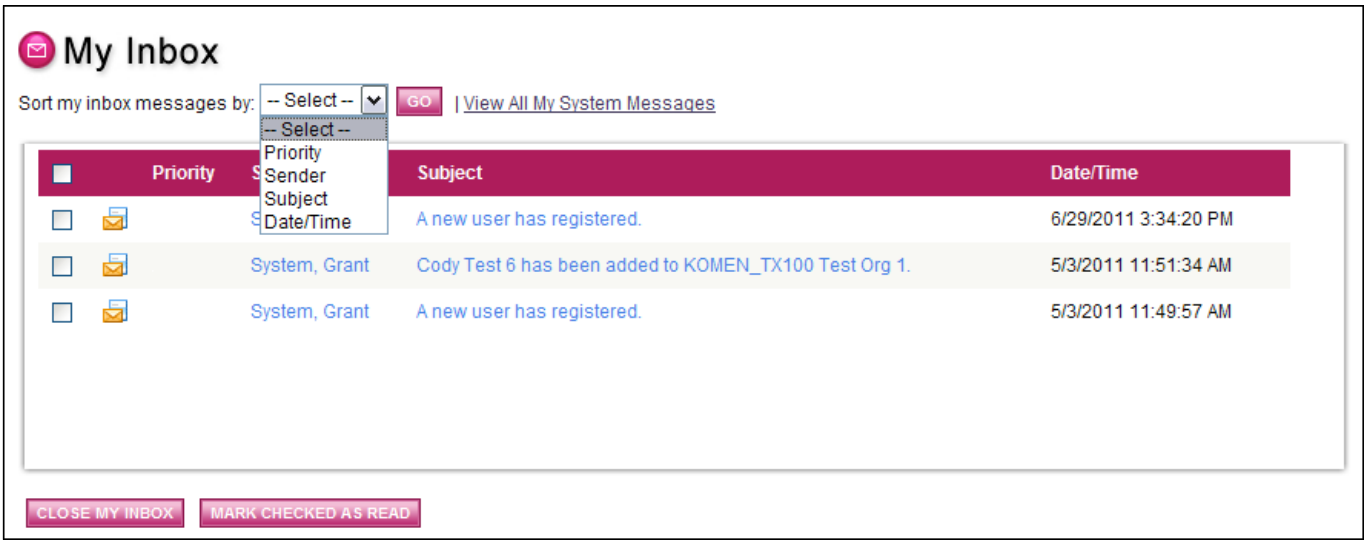
Automatic email notifications may be sent to you periodically throughout the grant year. These messages will be sent via the system according to an automatic process or as the result of a user triggered event. These messages might be triggered by the submission of an application, an application being sent for modifications or a pending due-date that is approaching. These messages are intended to help you know what is occurring in the system that pertains to you or your Organization. These messages may also be sent by Komen GeMS Affiliate personnel. These messages are designed to help keep you up to date with the progress of your application while also serving as reminders when action is required on your part.

In order to receive these messages it is important that you include an active, frequently used email address when creating your profile in the system. If you provide an incorrect email address or an address to an account that is either inactive or full, you will not be able to receive these important messages

System Messages

In addition to the automatic email notifications, there is an area referred to as the System Messages that manages messages sent to you either from the system itself or from Komen GeMS Affiliate personnel. You can view or edit your System Messages by following these steps:

1) Click the "Open My Inbox" button under the "View My Inbox" section on the main menu. You will now see any unread system messages. You may filter system messages by choosing an option from the drop down labeled "Sort my inbox messages by."



2) Clicking the Subject of a message will take you to the message itself. You can read the message from that screen and then may perform any of the following actions:
   (1) Click the "Reply" button to reply to the system message
   (2) Click the "Close" button to close the system message
   (3) Click the name of the sender to send an email to the sender of the message

Helpful Hints:

- Always hit "save" to save your data. If you do not hit "save" and you navigate away from the screen, your data will be lost.
- If you scroll over the first aid kits, help content will be available for that specific question.
- The system will log out after 45 minutes with no activity. If the system logs out automatically, the last data entered will not be saved if the save button was not selected prior to the log out.
- If you copy and paste text from Word, you must hit the backspace button within the text field for the character count to be shown.
- Print versions of the blank report and completed report are available within the Access Management Tools section of the application menu.
- Always use the "Back" button within the system when trying to return to a previous page.