pennsylvania
DEPARTMENT OF TRANSPORTATION

Partner Portal User Guide

eGrants

Document History

The table below serves as a document history log to track the version number, date, and description of each change/revision applied to this document.

Version	Date	Version / Revision Description
1.0	12/9/2021	Draft version delivered
1.1	12/16/2022	Updated based on release changes/enhancements
1.2	3/14/2023	Updated based on release changes/enhancements
2.0	June 2023	Updated version published
3.0	August 2023	Updated version published
3.1	9/29/2023	Added FEIN Partner Filter for Bulk Assign & Profile Edit revision
3.2	12/15/2023	Removed old Route Sheet references Added bulk Partner Portal revoke access
3.3	3/29/2024	Added SSRS Reports in External User section

Table 1. Document History

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1.0 Introduction

The Partner Portal is an external-facing module used by the program office for collecting and/or sharing information with an applicant or grantee after an application has been submitted. Features include application review, document upload, invoice submission, etc. Partner portal access is assigned individually to a user for single or multiple applications.

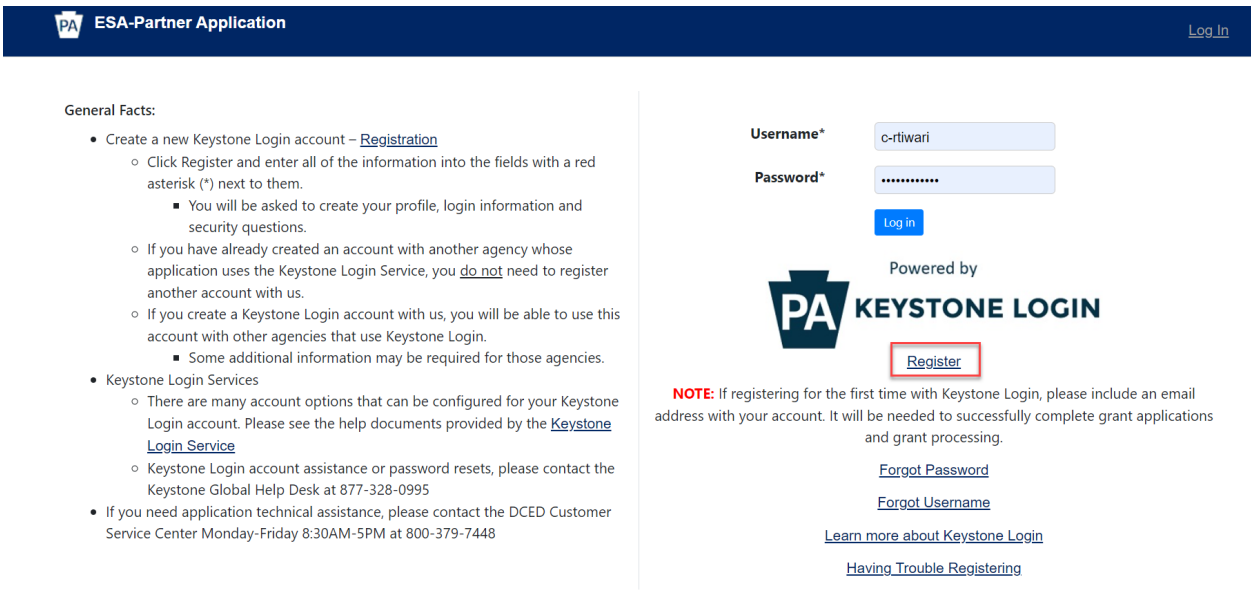
Types of partner portal access include the following categories:

- **PTS Grant Coordinator:** It allows users to access the highway safety enforcement tracking and enforcement reimbursement report for the PTS program.
- **PTS Officer:** It allows users to access the highway safety *officer* enforcement tracking and enforcement reimbursement report for the PTS program.
- **Read only:** It allows users to view the submitted applications and invoices. Users won't be able to edit or upload documents in the Partner Portal.
- **Show Reports:** It allows users to view/generate the SSRS reports from the partner portal.
- **Tracking:** It allows users to access the tracking module and submit information.
- **Upload Comments Documents:** It allows users to upload documents as requested by program staff.
- **Viewer:** It allows users to view the entire application at any point within the workflow and be Read-Only.
- **Workflow:** It allows users access to ESA workflow. It is the only option for the user to be able to 'push' the application review back to the program staff.

Production Partner Portal Link: https://apps.dced.pa.gov/esa-partner/

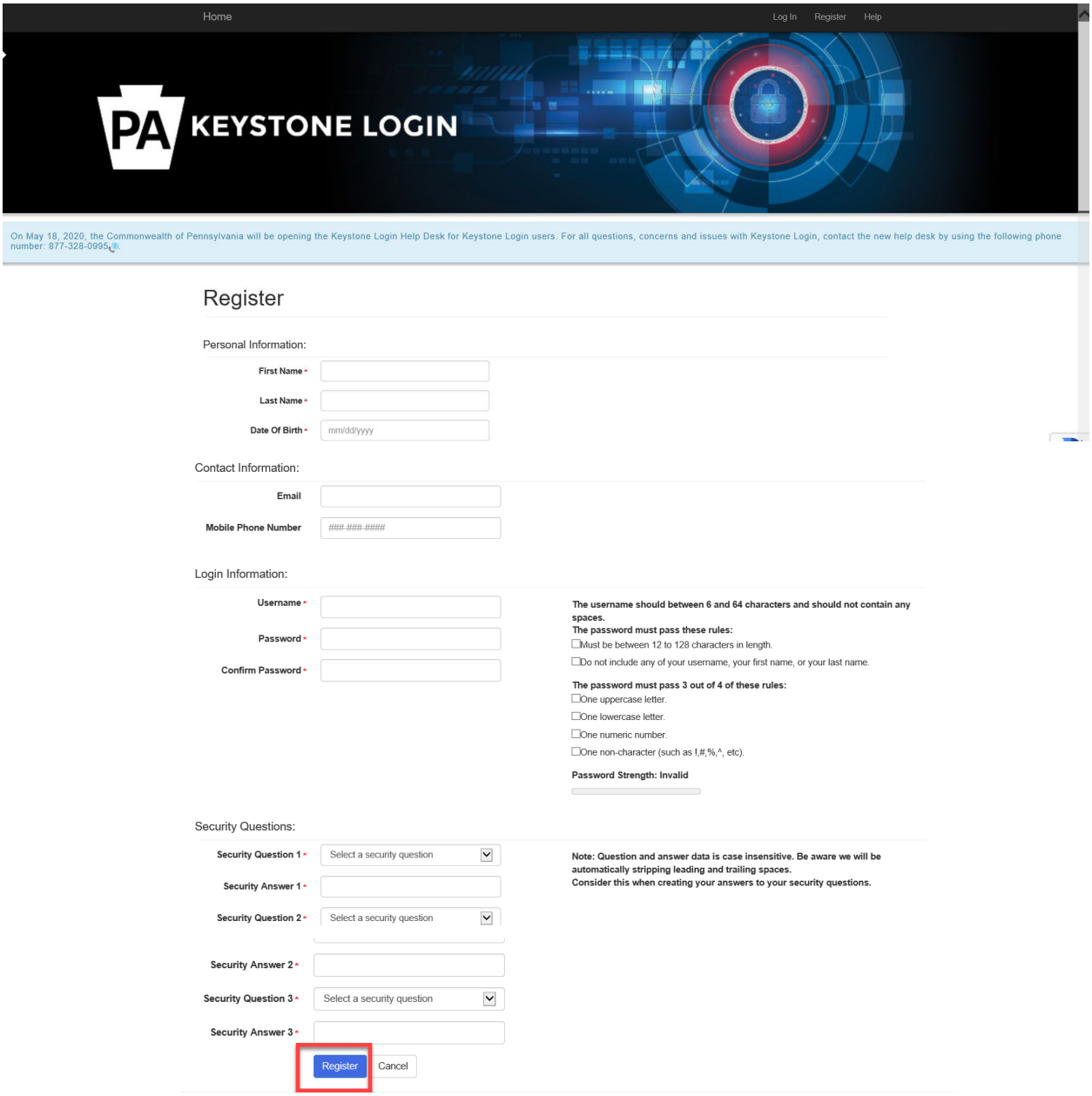
2.0 Partner Portal – External Users

If users don't have an account to Keystone Login, click Register highlighted on the main login page and the system will take the user to Keystone



2.1 New User Registration

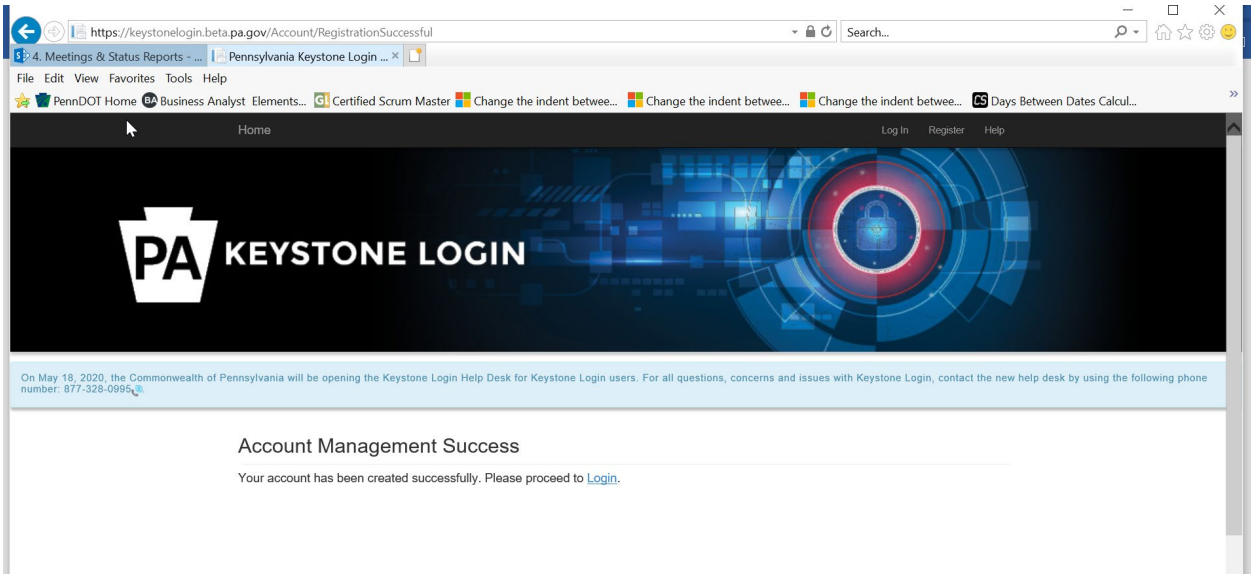
Enter all the information in the fields marked in the right margin by a red asterisk and click Register. *These are required fields.* The rest of the fields are optional.



- **First Name**: Enter your first name.
- **Last Name**: Enter your last name.
- **Date of Birth**: Enter your date of birth.
- **Email:** Enter your email address.
  Note: The user must enter a valid email address during the registration process.
- **Mobile Phone Number:** Enter your Mobile Phone Number. This field is optional.

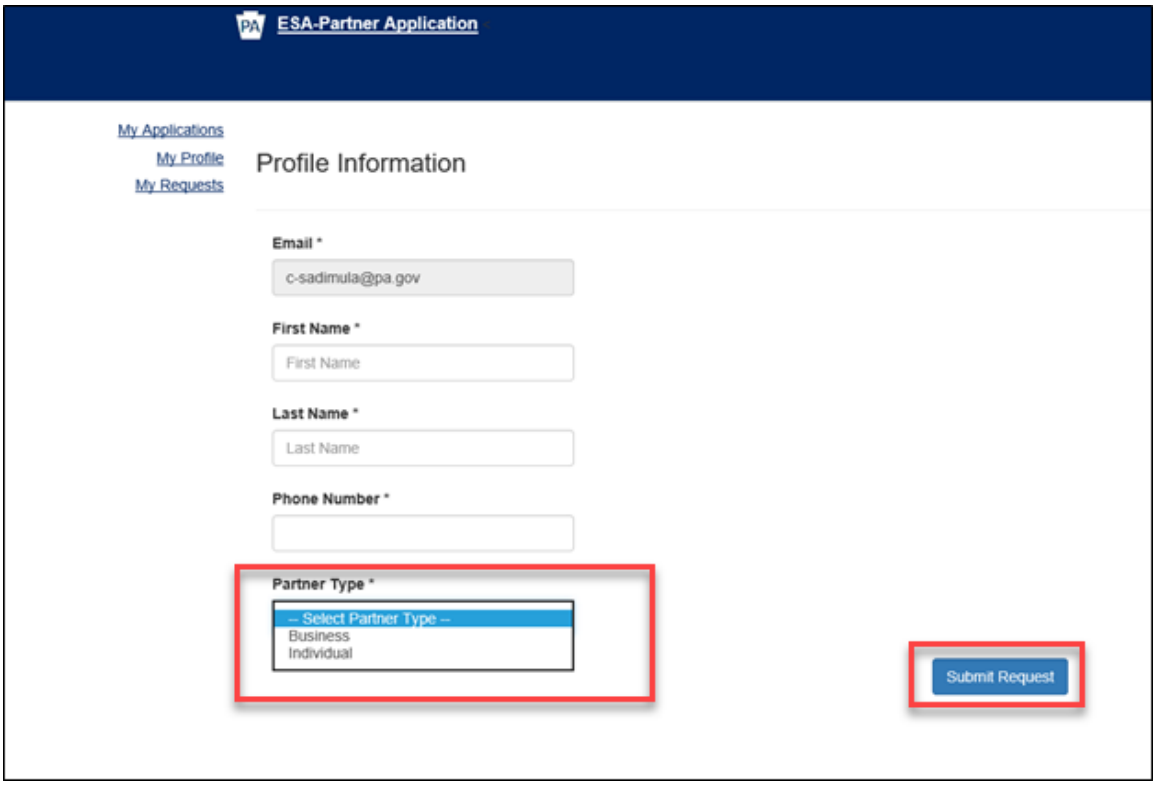
- **Username:** Create a user name. The username must be between 6 and 64 characters without any spaces.
- **Password:** Create your password here. The password must be between 12 and 128 characters and should follow 3 out of 4 rules as listed below:
  - One uppercase letter
  - One lowercase letter
  - One numeric number
  - One non-character (such as! #,%,^, etc.).
- **Confirm Password:** Re-enter your password. This field has the same restrictions as the Password field.
- **Security Questions:** This is a security question in case the user loses or forgets their username or password. It helps to confirm the user's identity since it will be a unique question.

2.1.1 Registration Complete and Continue



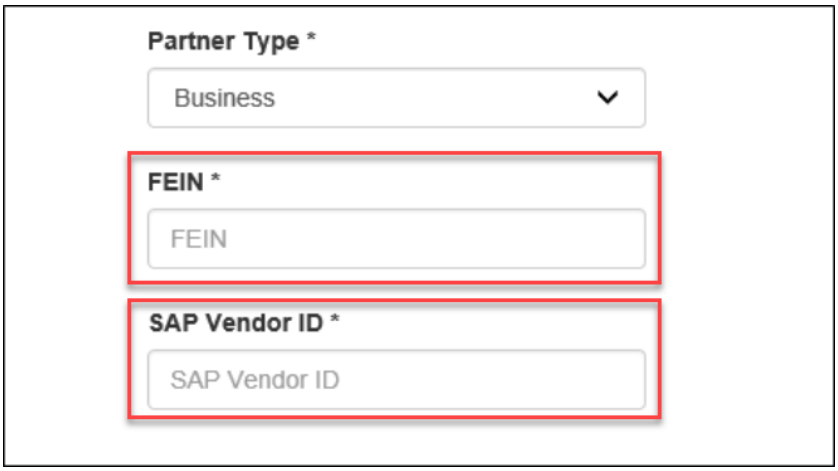
After the user logs in back to the Partner Portal with the new Username and Password, the system will take the user to the page where the partner profile needs to be set up. The next section shows the required steps to create a user profile in the Partner Portal.

2.1.2 Creating a User Profile



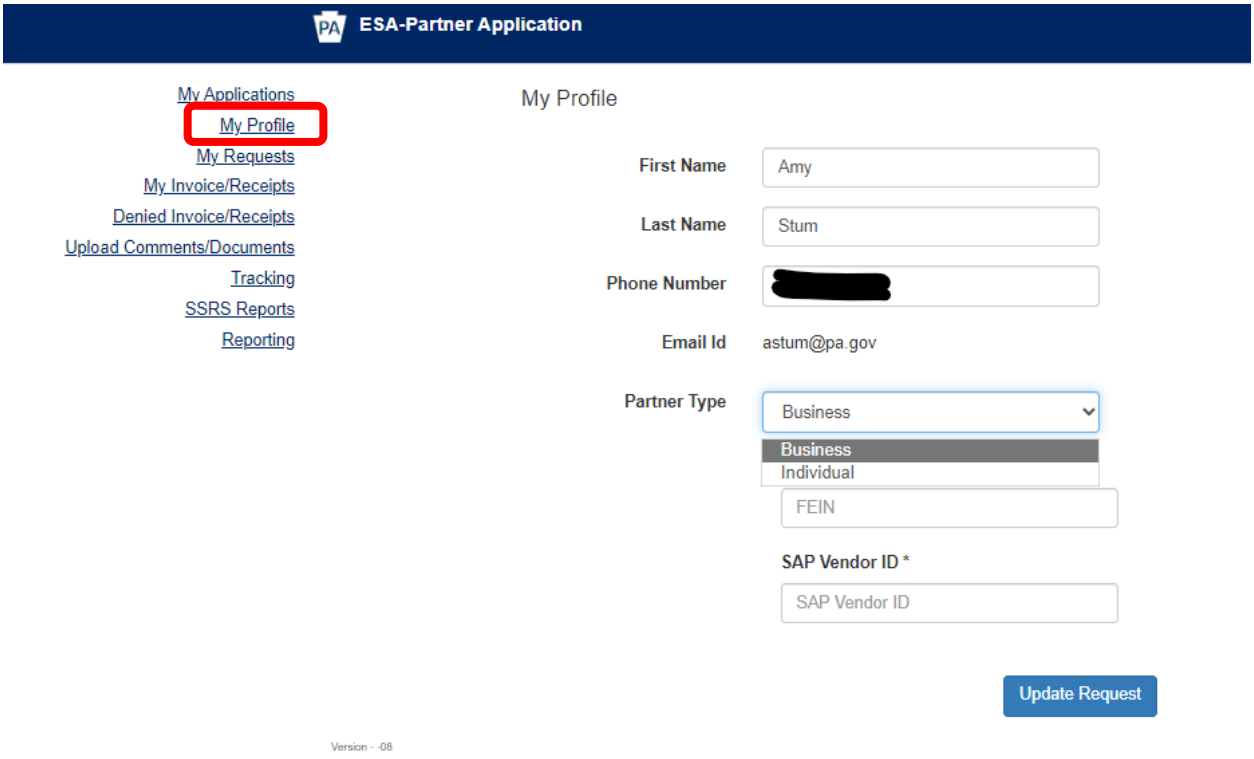
- Enter your First and Last Name in the field.
- Enter the Phone Number in the field.
- Select **Business** in the Partner Type dropdown option.
- Enter your business's FEIN and SAP Vendor ID and click "Submit Request."

Note: The user must select the "Business" partner type in the partner type dropdown option.

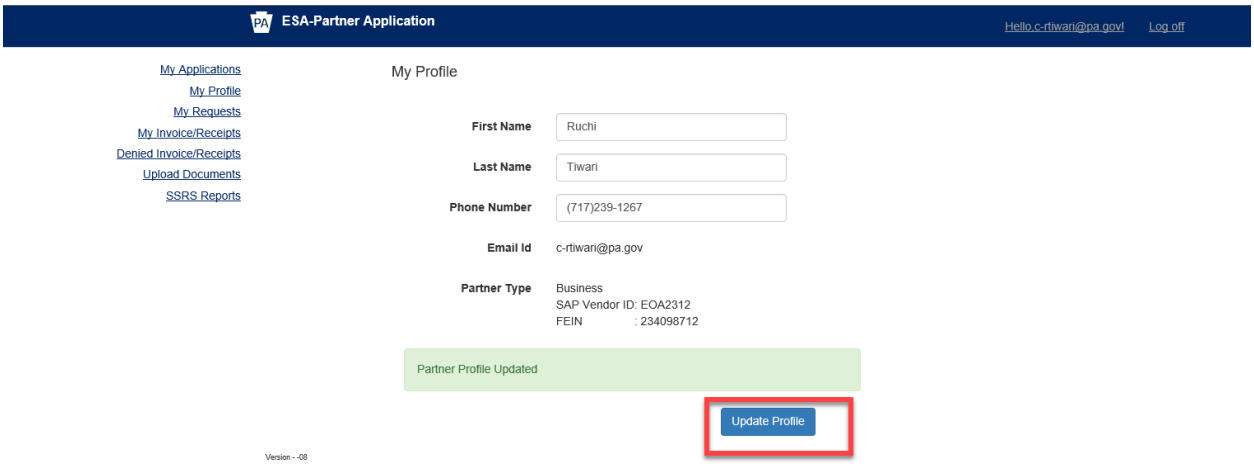


2.2 Add or Change a Profile

To add or change user information in the user profile, Click on “My Profile.” The partner type may be changed by the dropdown.

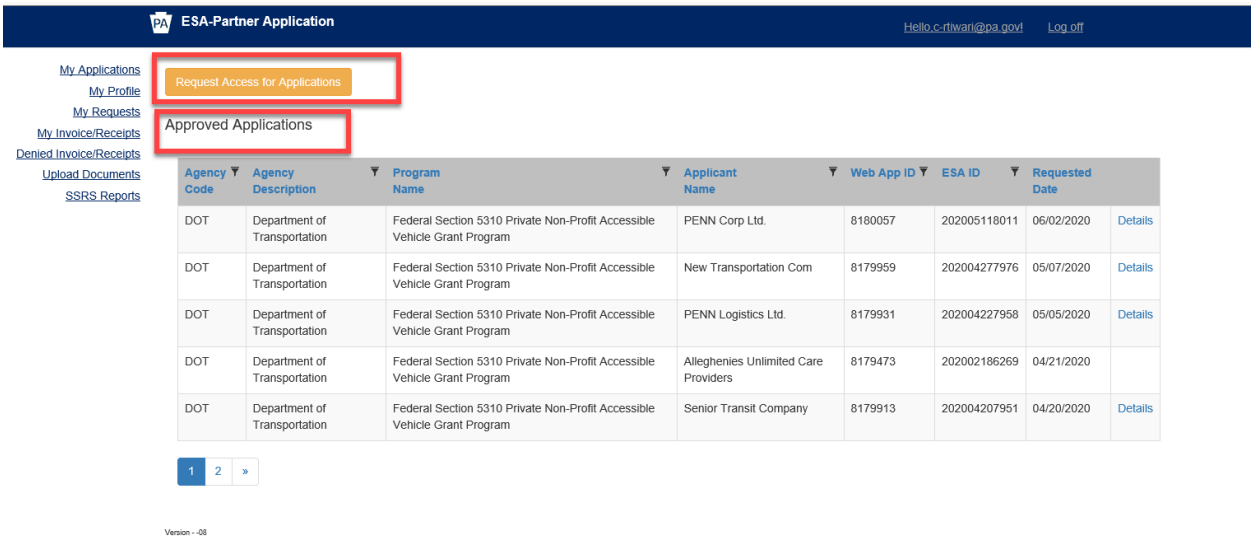


After updating the profile information, click “Update Profile.” The system displays the message, **Partner Profile Updated,** at the bottom of the screen as shown below:



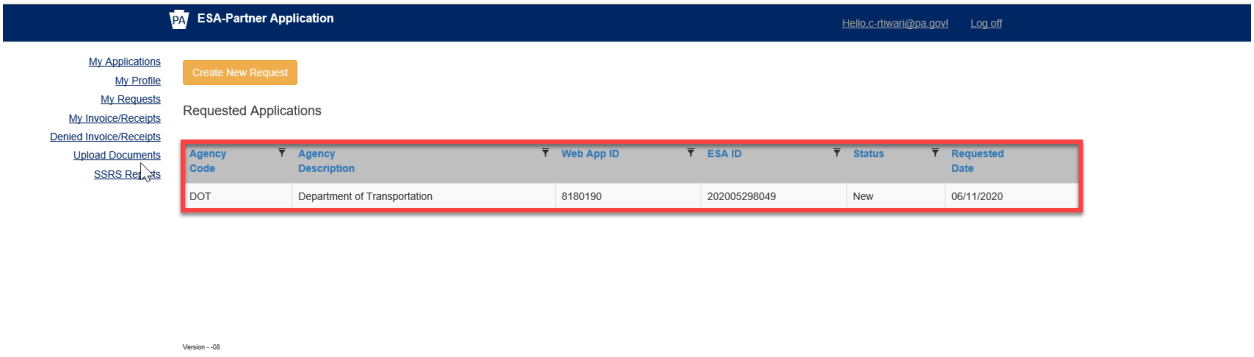
2.3 Request Access for Applications

When the Partner completes their profile in the Partner Portal, the Approved Applications appear as shown below.

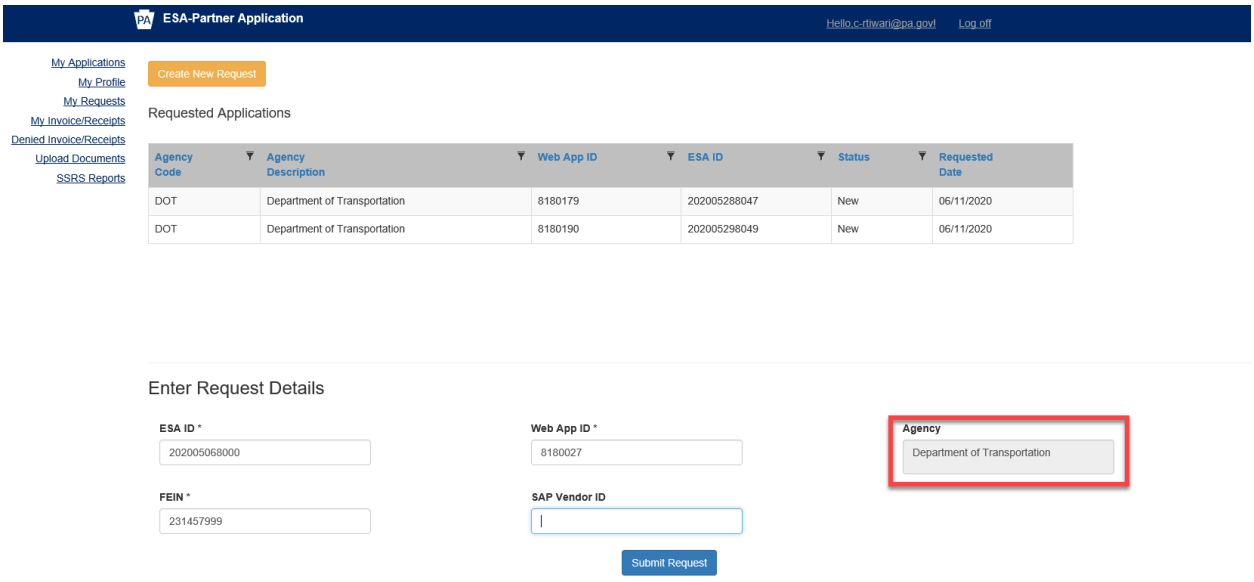


Click Details in the rightmost column to view the Electronic Single Application (ESA) application details.

To request access to a new application, Partner clicks “Request Access for Application.” When the partner clicks “Request Access for Application “in the *Approved Applications* screen, the *Requested Applications* screen is displayed with all applications requested by the Partner.

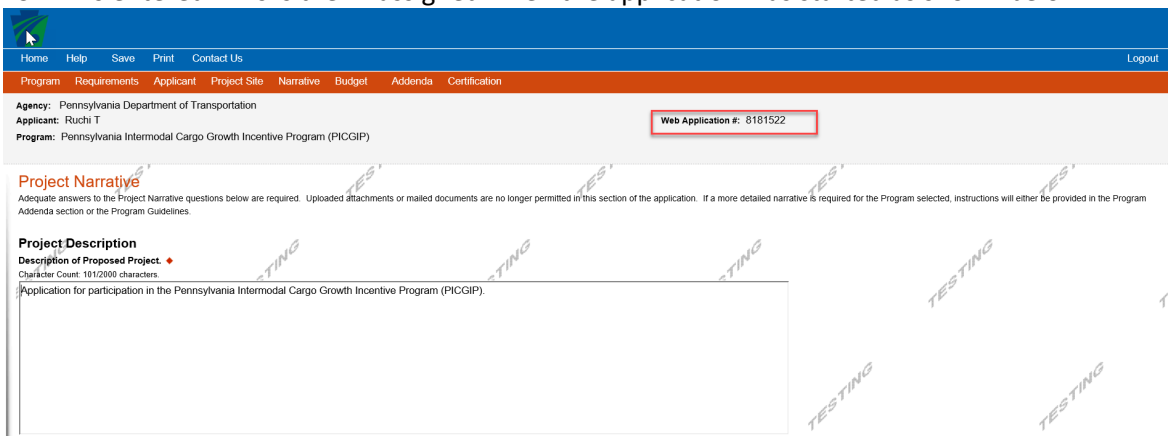


To request a new application, click Create New Request. Enter the required fields in the **Enter Request Details** screen as shown in the below screenshot:



- Enter ESA ID. ESA ID is a 12-digit number that is auto-populated when the Web App ID is entered. This is the ID assigned when the application was submitted as shown below.

- Enter Web App ID. Web App ID is a 7-digit application ID number that is auto-populated when the ESA ID is entered. This is the ID assigned when the application was started as shown below.



- For applications previously submitted, the IDs can be located under “Submitted Applications”

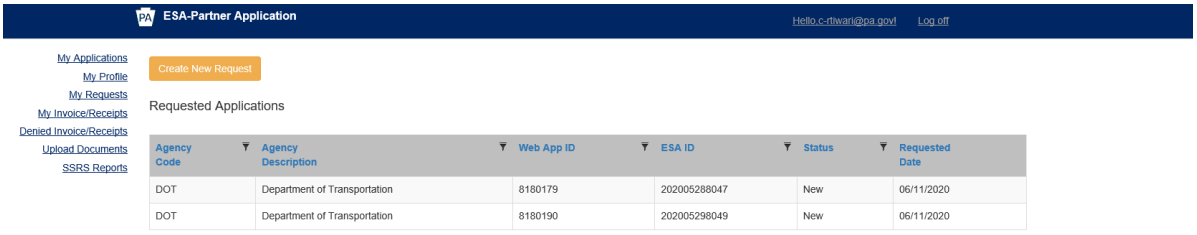
- Enter FEIN.
- The SAP Vendor ID is optional.

Notes:

- Fields marked with an asterisk (*) are required. The Agency name will automatically populate in the Agency field on the right side of the screen.
- The FEIN and SAP vendor numbers combination should be based on what was submitted with the application. If the SAP vendor number was not included in the application, this field should be left blank when users are requesting access to the partner portal.

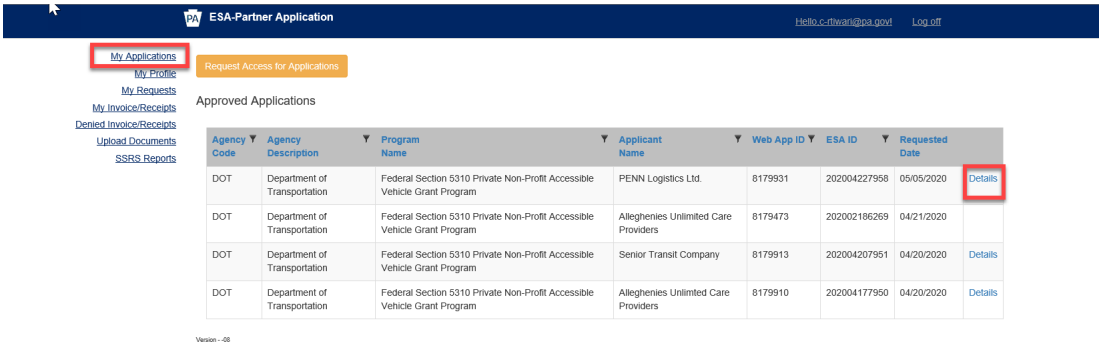
The user can enter either one of these – ESA ID or Web App ID. The number that is not manually entered will be auto-populated in the blank field.

- FEIN is a 9-digit number Federal Employer Identification Number
- SAP Vendor ID is a 6-digit number provided by the Commonwealth to receive payment.
- Click Submit Request. The new application appears at the top of the table with New Status. To create further requests, click Create New Request.



2.4 Review the Submitted Applications

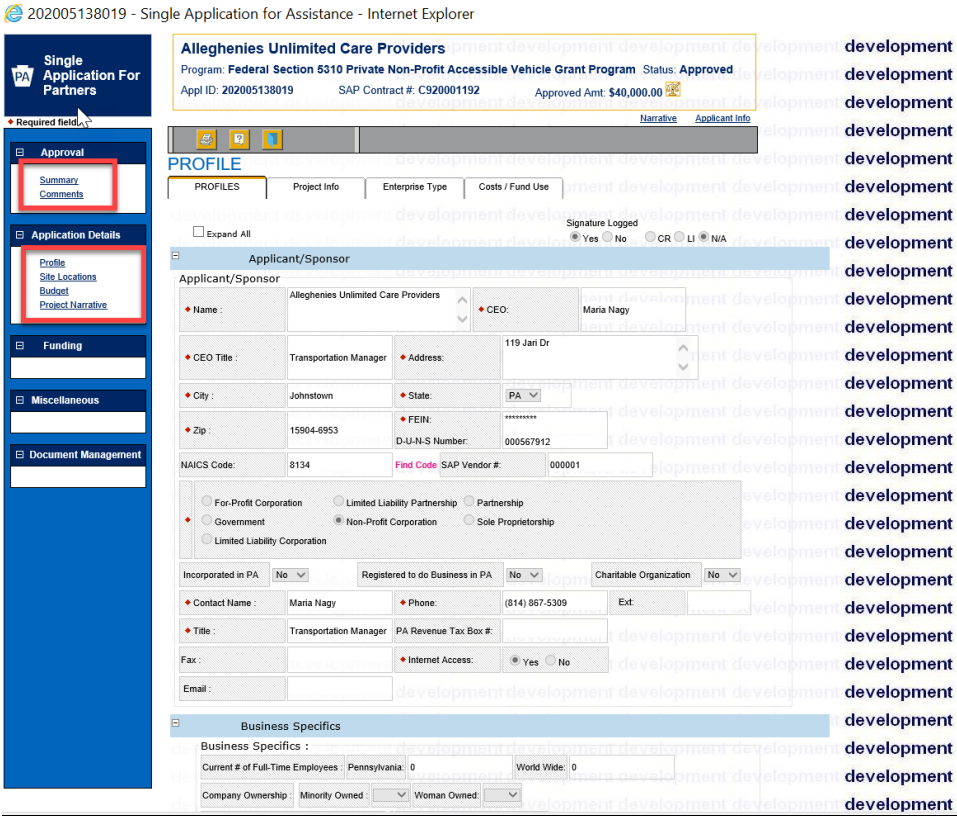
Click the My Applications link on the left side of the screen.



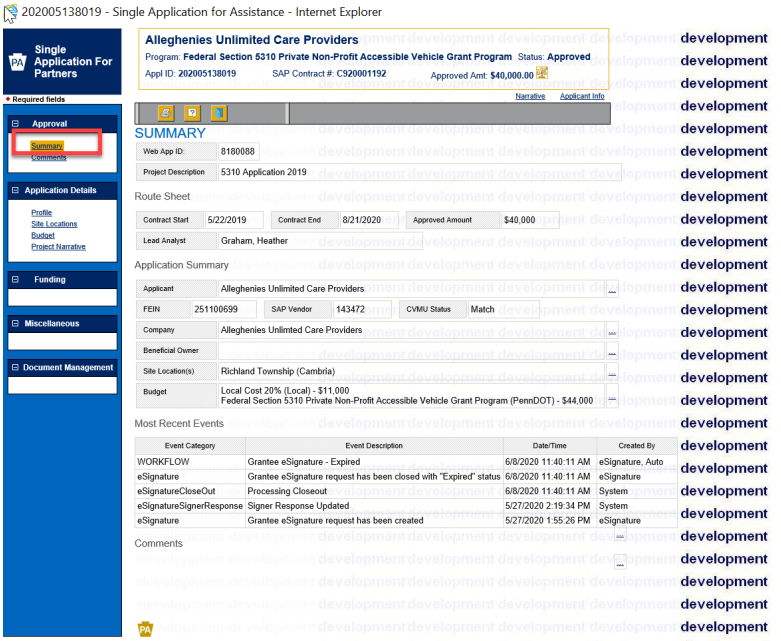
Click on the details link at the rightmost column of the table to open the ESA application details. The Partner will be able to see the application details in ESA. The Partner will only be able to see information based on access provided by program users in the ESA module. The below section describes the ESA application details.

Note: The Details link takes control of ESA application details for applications with “Approved” and “Under Review” Status. The Detail link will not open the ESA for applications that are in “In Legal Process,” “Legal Process Complete,” “Void,” “Withdrawn,” “Rescind,” and “Denied” Status.

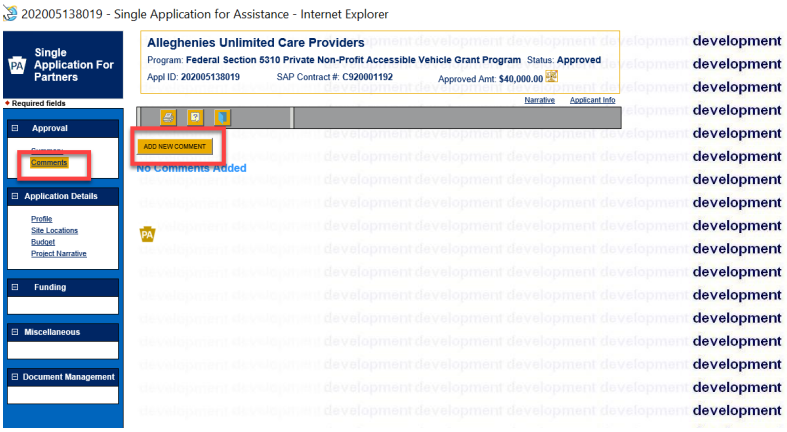
2.4.1 ESA Application Details



- Summary Under the Approval Section provides the project description, Application Summary, and recent activities as shown in the below screenshot.

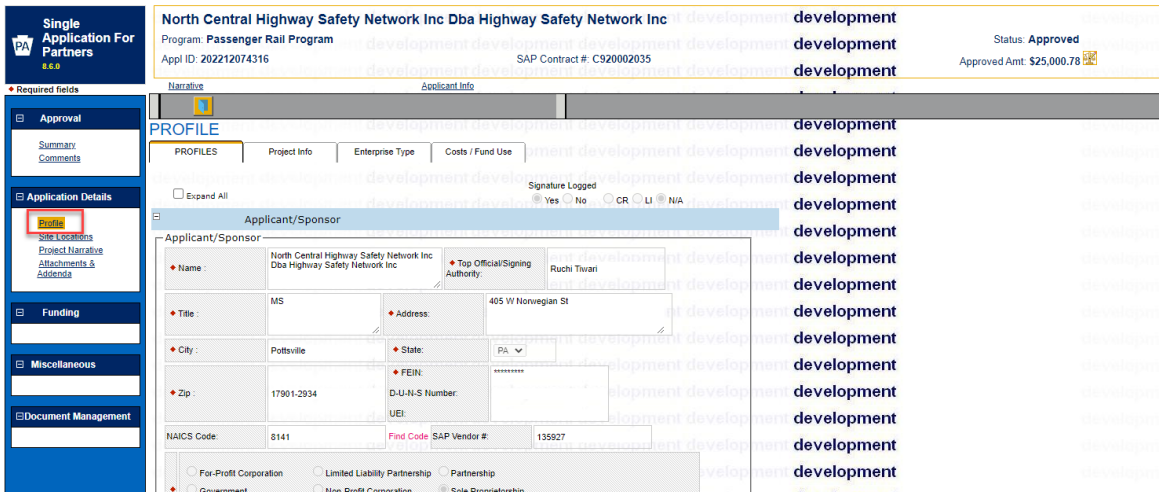


- Comments under the Approval Section display any entered comments by the program area.

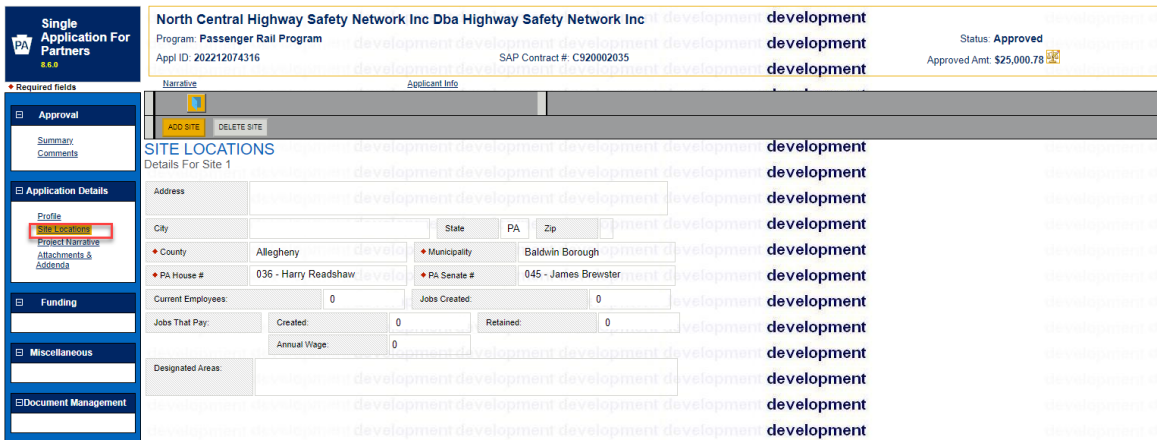


The application details section displays information submitted by the applicant on the Electronic Single Application Web (ESAW)

- Profile under the Application Details Section displays information about the Applicant's profile and their organization.

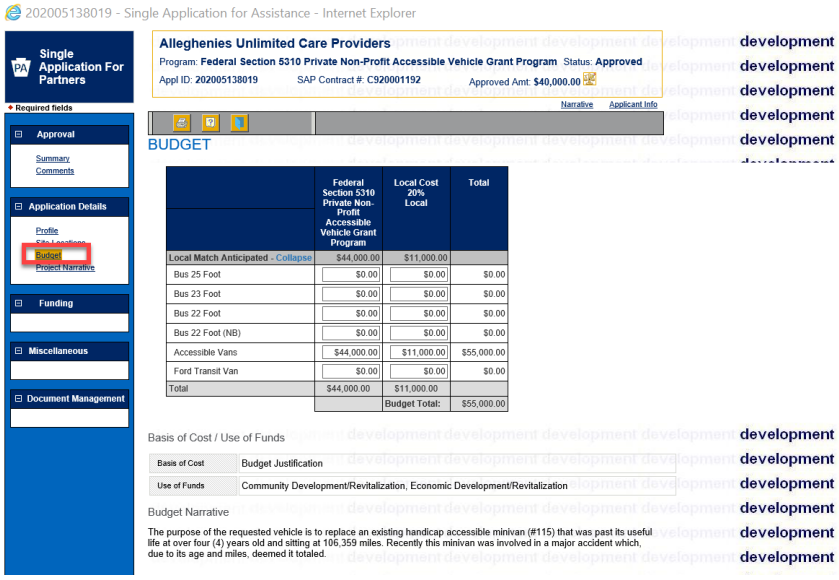


- Site Locations under the Application Details Section display information about Project Site location (s).

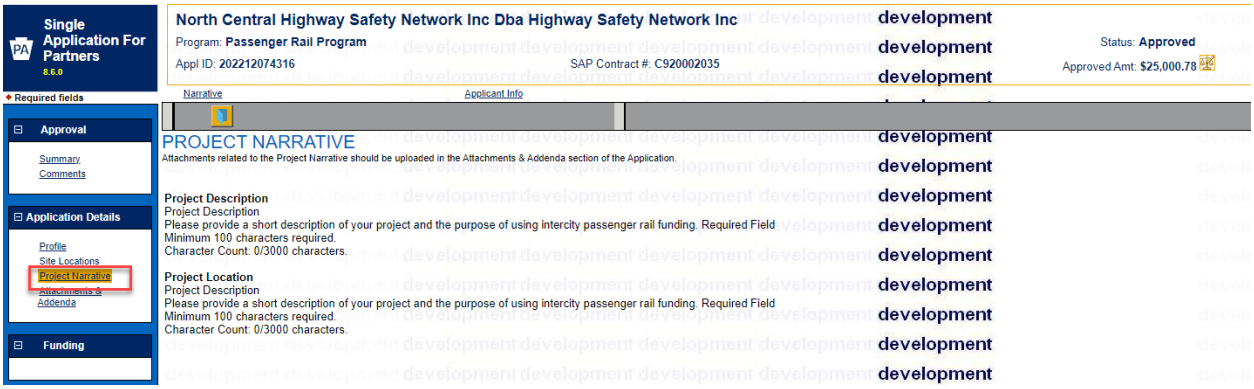


- Budget (if applicable) under the Application Details Section displays Project Budget details.

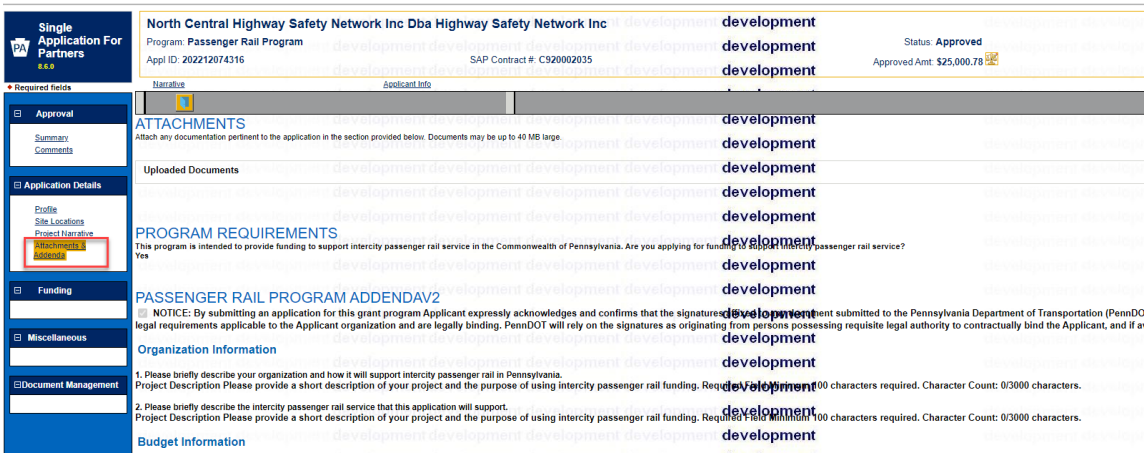
Note: The user will only see the 'budget tab' if it was added by the program area to the user's access.



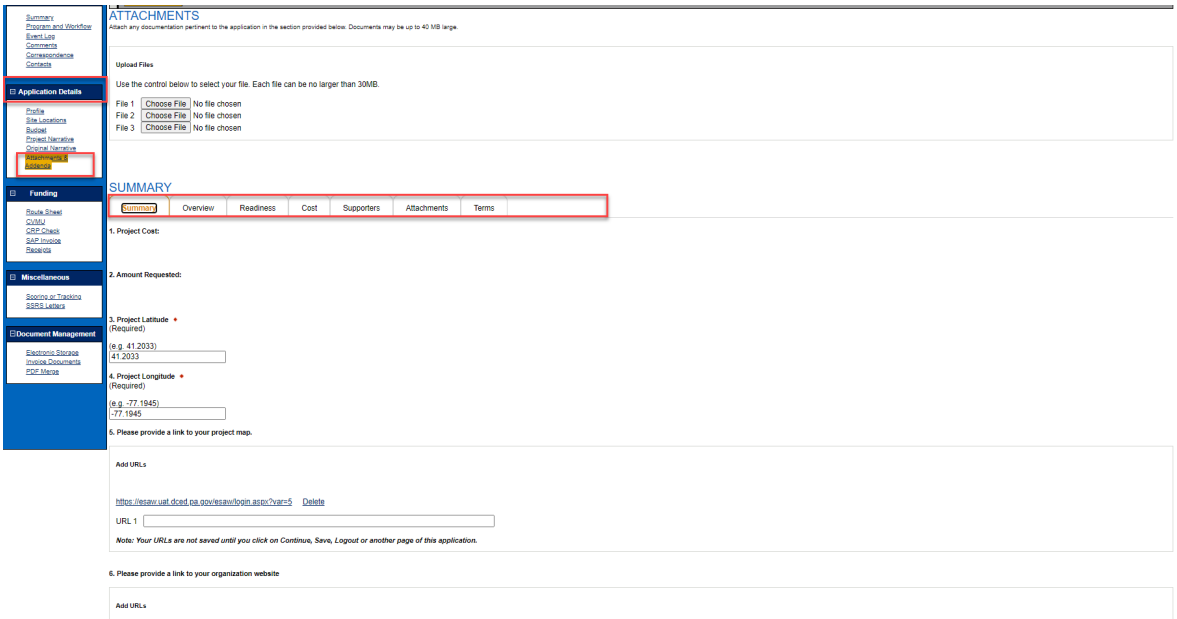
- Project Narrative under Application Details Section displays information about Project Narrative provided by Applicant.



- Attachments & Addenda under the Application Details section provides the information and attachments requested by the program staff at the time of the application process.

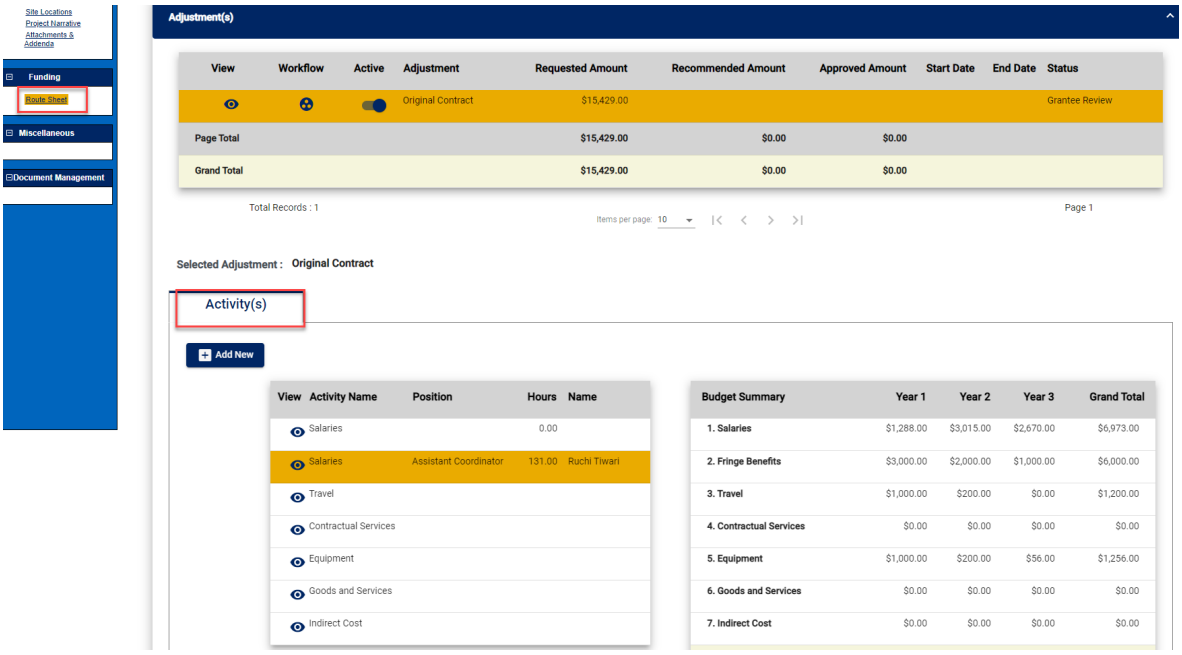


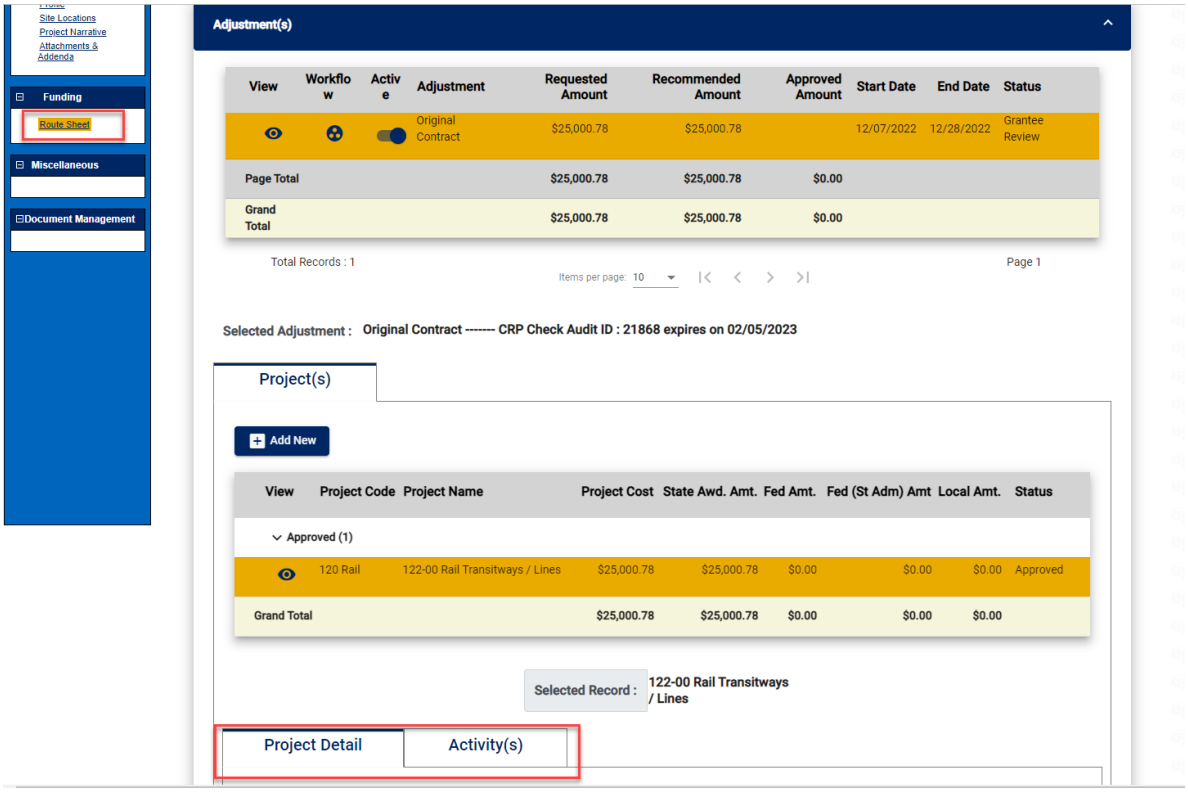
Note: The multi-tab addenda feature is enabled for a few programs. Below is an example:



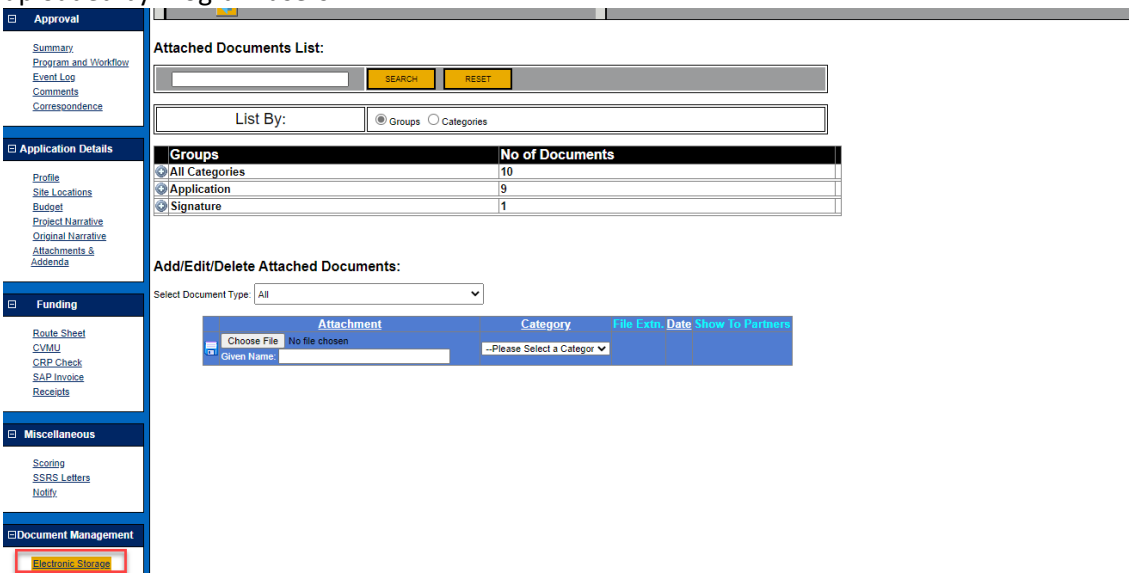
- The RouteSheet (if access is provided by the program area) link under the Funding section displays the “Project(s)” and “Activity(s)” tabs OR the “Activity(s)” tab. To review the “project and activity” or click “RouteSheet.” Below are two sample examples.

  Note: The project and activity tabs do not apply to all PennDOT programs. Ignore this step if you don’t see them in your application.





- Electronic Storage (if access is provided by the program area) link under the Document Management section displays documents submitted by Partner via Partner Portal or documents uploaded by Program users.



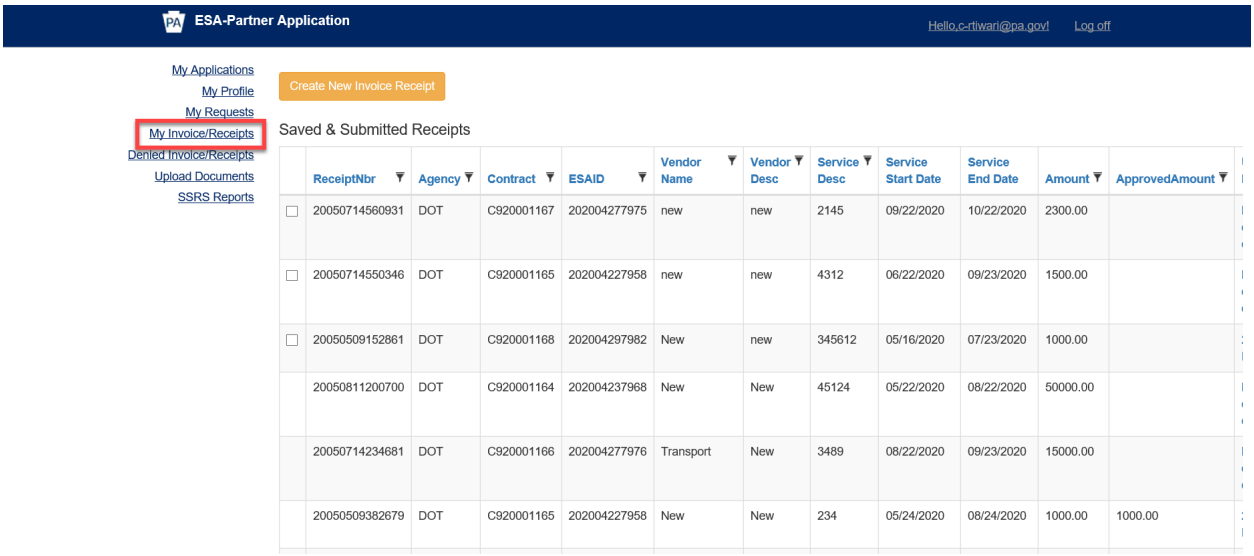
Please refer to the Partner Portal Application Updates to review the steps for updating the submitted application when it is reworked from the program area.

2.5 Invoices

The grantee can submit a receipt for an executed contract using the Partner Portal. For the grantee to access the Partner Portal, the Program area needs to assign the application to the grantee, for which the legal process is completed and the executed contract is received. One application can have multiple invoice receipts associated with it.

2.5.1 My Invoice/Receipts

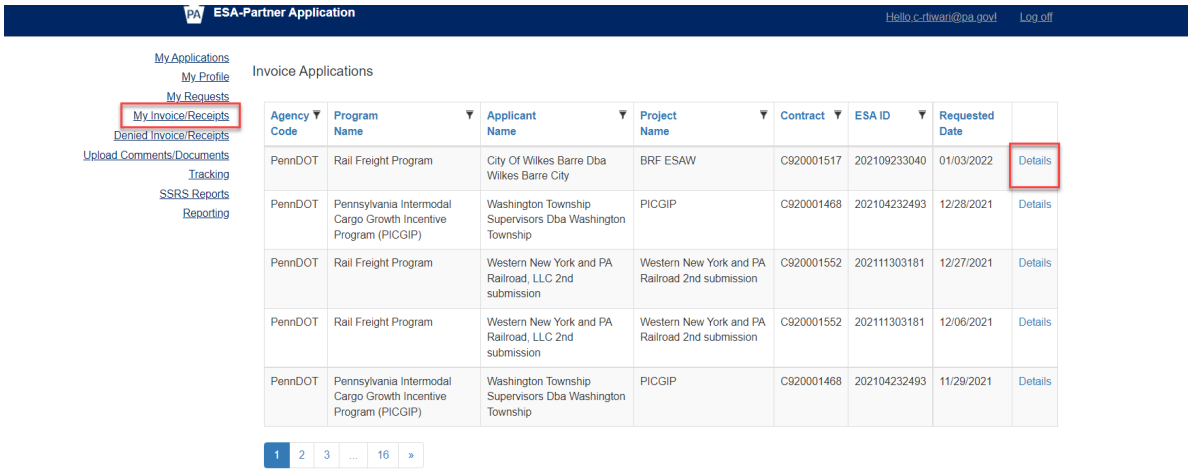
My Invoice/Receipts grid shows the invoice/receipts created by the Grantee logged into the Partner Portal.



	ReceiptNbr	Agency	Contract	ESAID	Vendor Name	Vendor Desc	Service Desc	Service Start Date	Service End Date	Amount	ApprovedAmount
☐	20050714560931	DOT	C920001167	202004277975	new	new	2145	09/22/2020	10/22/2020	2300.00	
☐	20050714550346	DOT	C920001165	202004227958	new	new	4312	06/22/2020	09/23/2020	1500.00	
☐	20050509152861	DOT	C920001168	202004297982	New	new	345612	05/16/2020	07/23/2020	1000.00	
	20050811200700	DOT	C920001164	202004237968	New	New	45124	05/22/2020	08/22/2020	50000.00	
	20050714234681	DOT	C920001166	202004277976	Transport	New	3489	08/22/2020	09/23/2020	15000.00	
	20050509382679	DOT	C920001165	202004227958	New	New	234	05/24/2020	08/24/2020	1000.00	1000.00

2.5.2 Receipt Submission

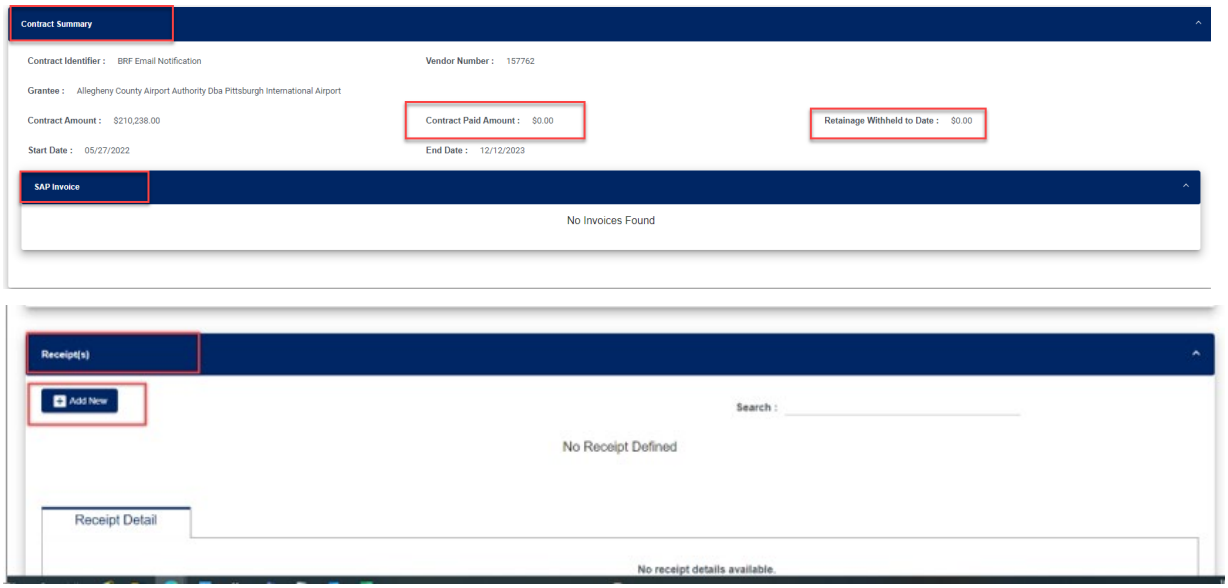
1. Click the “My Invoice/Receipts” link that shows the invoice/receipts created by the Grantee via the Partner Portal. Click the “Details” link as shown below.



Agency Code	Program Name	Applicant Name	Project Name	Contract	ESA ID	Requested Date	
PennDOT	Rail Freight Program	City Of Wilkes Barre Dba Wilkes Barre City	BRF ESAW	C920001517	202109233040	01/03/2022	Details
PennDOT	Pennsylvania Intermodal Cargo Growth Incentive Program (PICGIP)	Washington Township Supervisors Dba Washington Township	PICGIP	C920001468	202104232493	12/28/2021	Details
PennDOT	Rail Freight Program	Western New York and PA Railroad, LLC 2nd submission	Western New York and PA Railroad 2nd submission	C920001552	202111303181	12/27/2021	Details
PennDOT	Rail Freight Program	Western New York and PA Railroad, LLC 2nd submission	Western New York and PA Railroad 2nd submission	C920001552	202111303181	12/06/2021	Details
PennDOT	Pennsylvania Intermodal Cargo Growth Incentive Program (PICGIP)	Washington Township Supervisors Dba Washington Township	PICGIP	C920001468	202104232493	11/29/2021	Details

1 2 3 ... 16 »

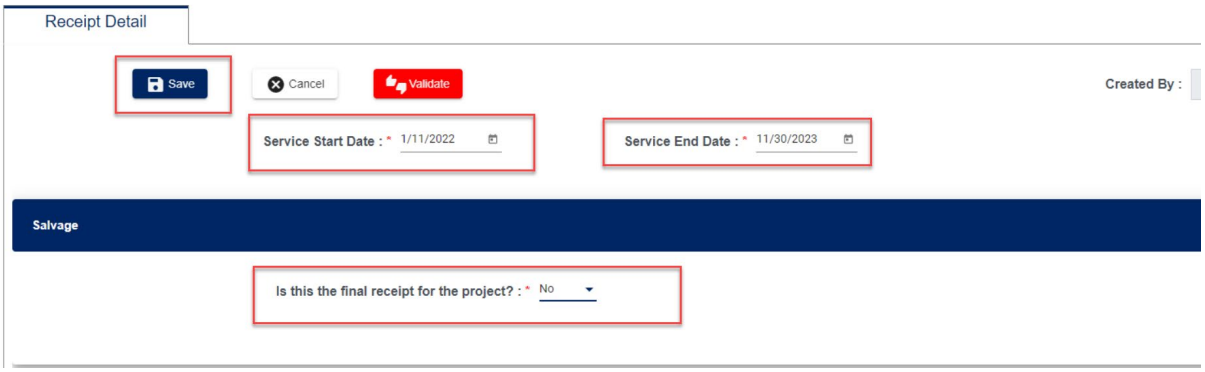
2. The system will display the screen as shown below. Expand the “Contract Summary,” “SAP Invoice,” and “Receipt” tabs to review the information.



Notes:

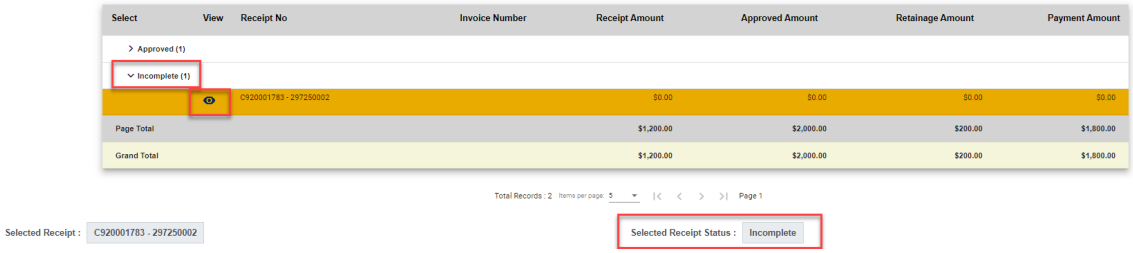
- The “Contract Summary” and “SAP Invoice” tabs also list a few program-specific fields (for example, "Retainage Withheld to Date," "Retainage Held, etc.).
- The field in the “SAP Invoice Section” will display all in-progress and stopped invoices (amounts will be $0 if the invoice is stopped).

3. To initiate a new receipt, the user clicks the “Add New” under the “Receipt(s)” tab.
4. Enter all required fields (indicated with red *****) such as “Service Start Date” and “Service End Date.”
5. Click Save.

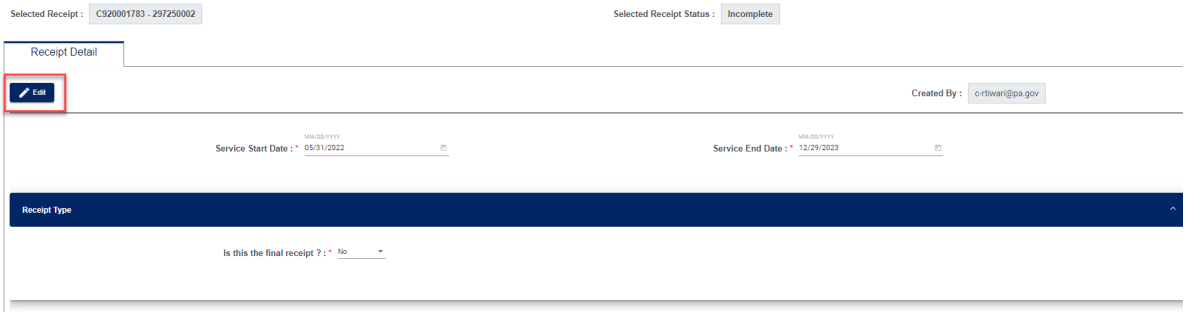


Notes:

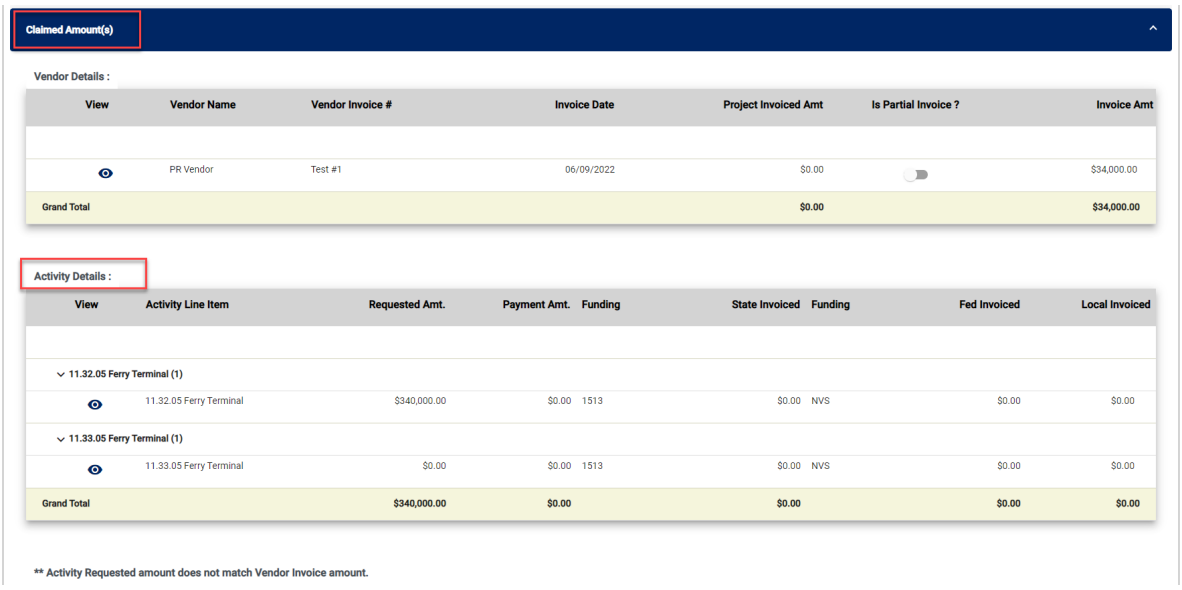
- The “Receipt Detail” tab also lists a few program-specific fields (for example, Salvage, etc.).
- The receipt status will remain “Incomplete” and won’t allow the user to submit the receipt until the user provides all required information.
- Click the eye icon to preview the respective receipt in case of multiple receipts.
- User can create multiple receipts using the “Add New” option as shown below.
- Click “Validate” to verify any error message(s) in case all required information is not entered.



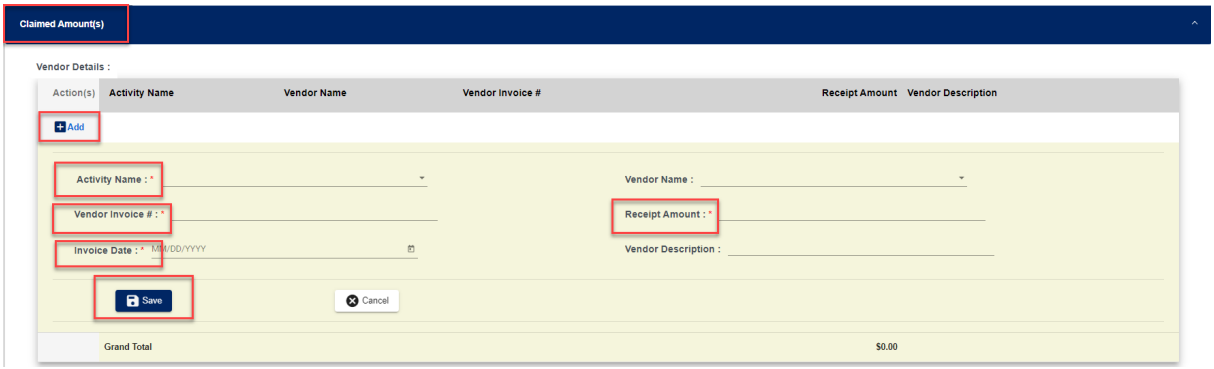
6. Click Edit to enter the amount, upload document (s), check the certification, and enter any comments (optional).



7. The "Claimed Amount(s)" tab varies by program, an example is shown below.



8. Click "Add" to enter the required information (indicated with red *) in the "Claimed Amount(s)" tab.
   - Choose the Activity Name and the appropriate vendor based on the approved bid(s). Enter other required information in the Claimed Amount tab.

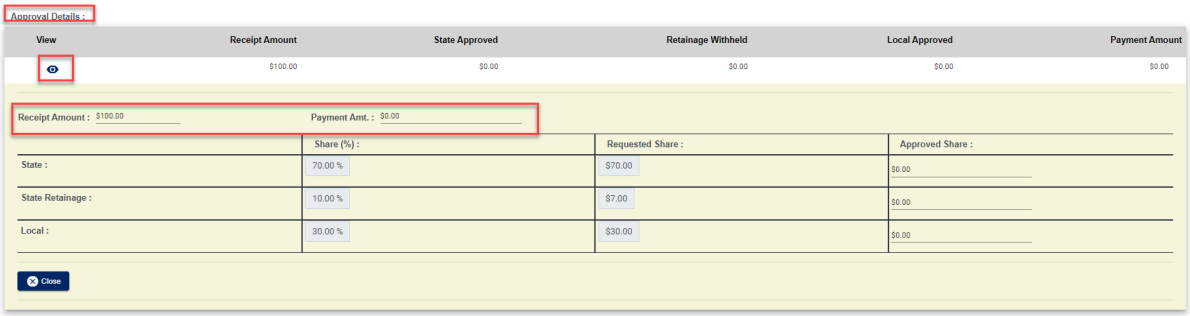


Note: This tab has program-specific validations.

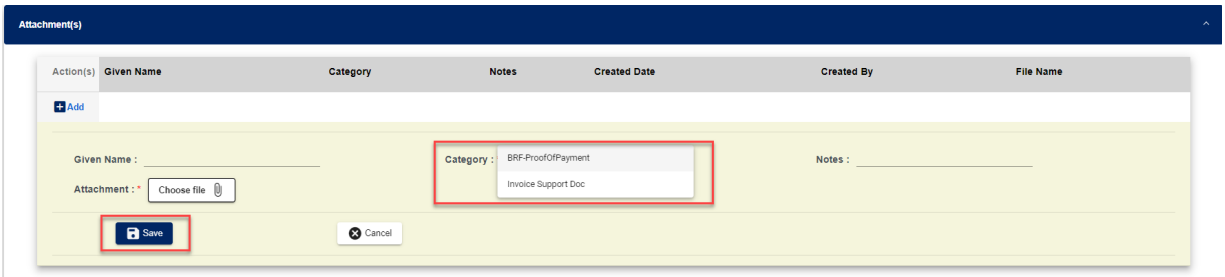
9. The "Approval Details" section automatically populates the "Receipt Amount" based on the entered information in the "Claimed Amount(s)" tab. Click the eye icon to view the information.

Notes:

- This section lists a few program-specific fields and validations.
- Grantees will have "Read-Only" access to the "Approval Details" section, and they won't be able to edit it. Amounts are estimates only until PennDOT has reviewed and approved the request.



10. Expand "Attachment(s) tab. Click "Add" to enter the required information (indicated with red *) in the "Attachment(s)" tab.



- Choose the category, attach the document, and click "Save."

Notes:

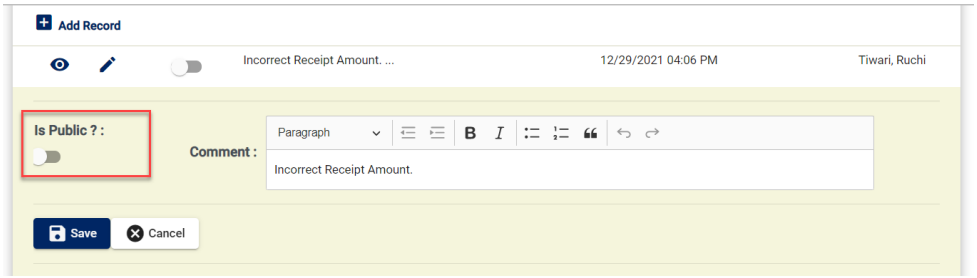
- The "Given Name" and "Notes" fields are optional.
- Multiple documents can be uploaded in the Attachment using the "Add Record" option.

- The size limit per upload is 30 MB.

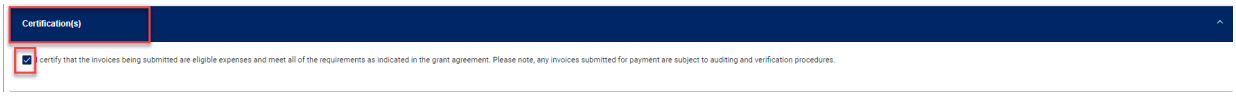
11. Expand “Comment(s) tab. Click “Add Record” to enter the comment in the “Comment(s)” tab. Enter a comment and click “Save.”

Notes:

- The Comment tab is optional unless otherwise noted; it’s required in the case of a partial invoice.
- All grantee comments will remain public.

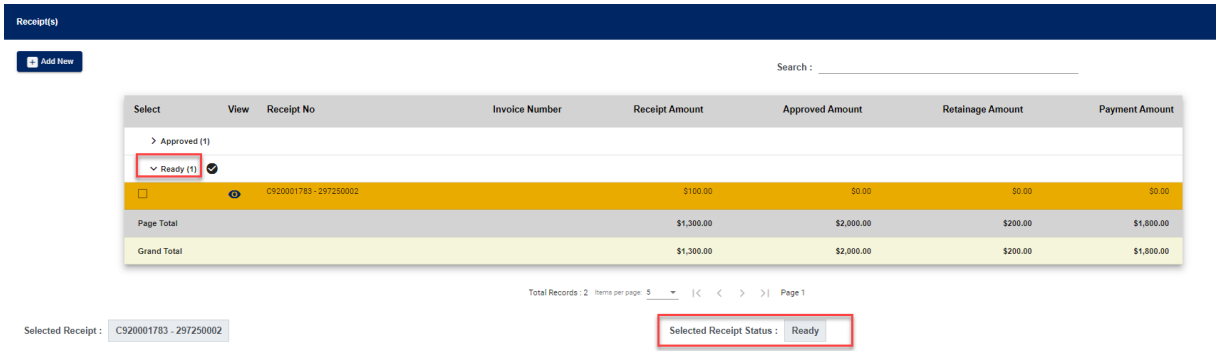


12. Expand “Certification(s)” tab. Click the checkbox in the “Certification(s)” tab.

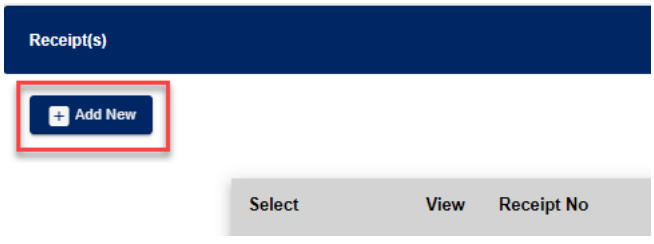


13. If all required information is provided, the system will change the receipt status from “Incomplete” to “Ready” as shown below.

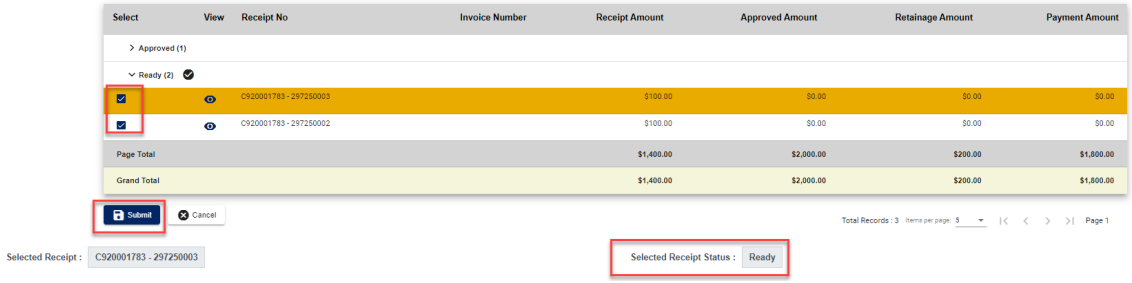
Note: The system will only display the “Submit” option for receipts with “Ready” status. The receipt has to be selected (checkbox) as well for the ‘Submit’ option to appear



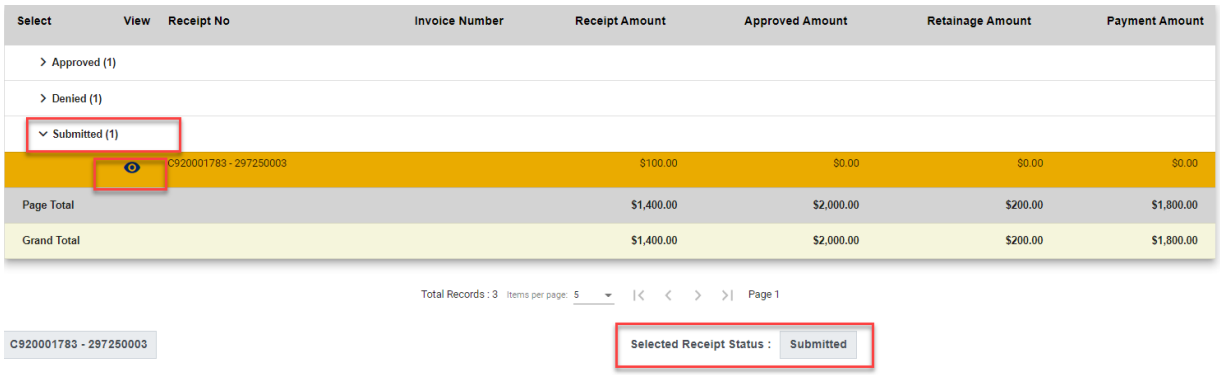
14. Click “Add New” to submit multiple receipts.



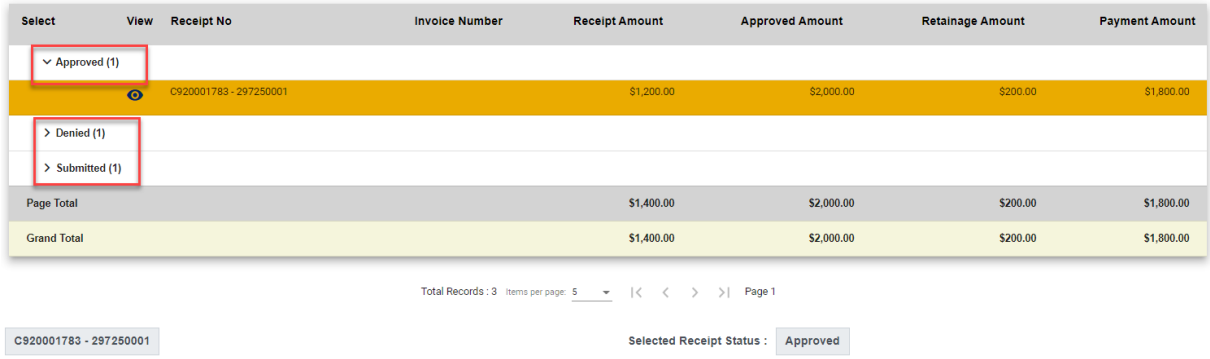
15. Select multiple receipts with “Ready” status and click “Submit” as shown below.



16. The receipt status will be changed to “Submitted” as shown below. The user won’t be able to make any changes to submitted receipts.

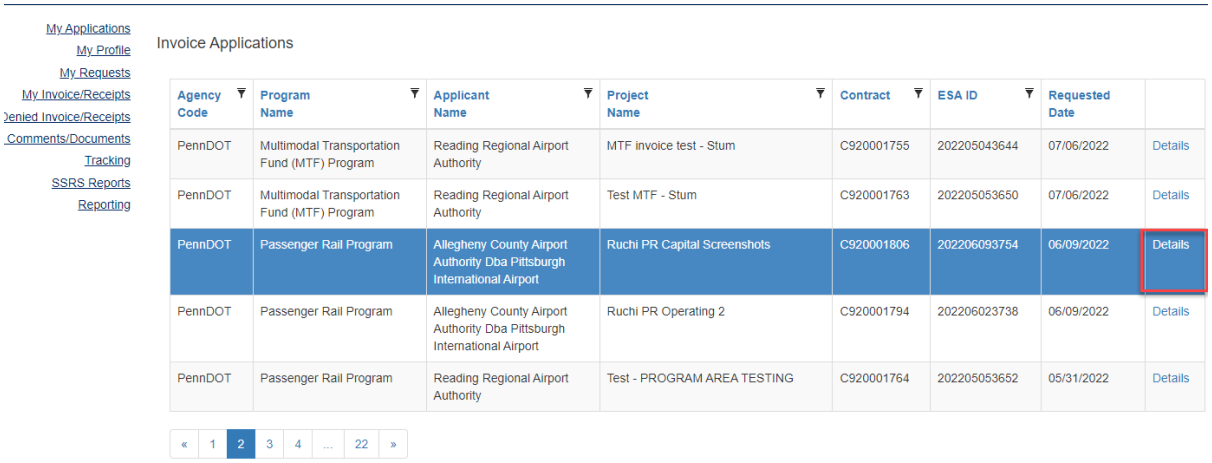


17. The receipt status can be tracked via the partner portal as shown below.

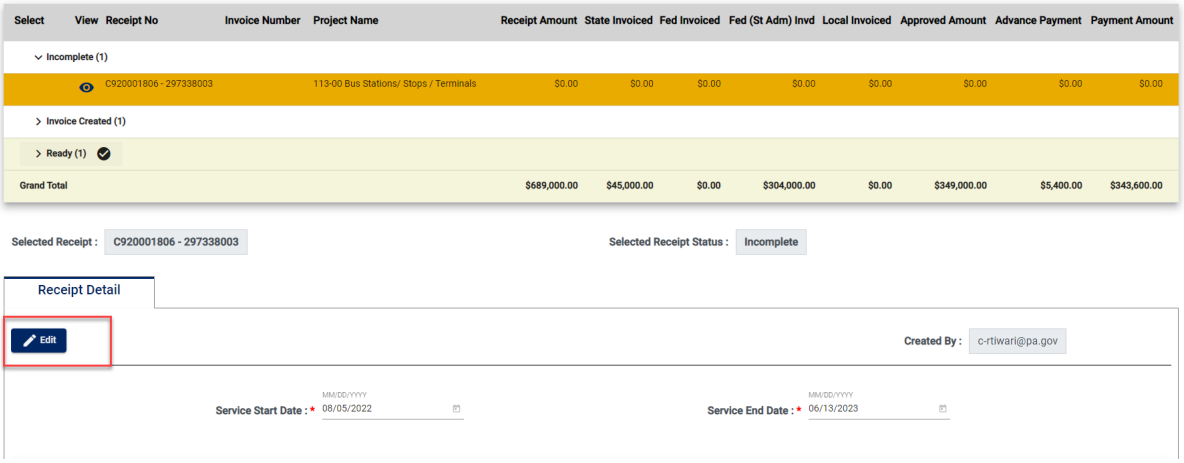


2.5.3 Edit and Delete Receipt

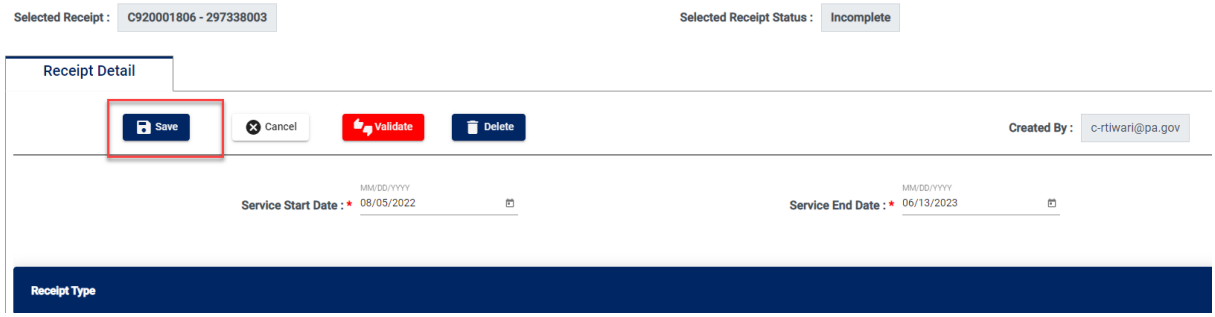
1. To edit/delete a receipt, click the "Details" link for the assigned contract ID as shown below.



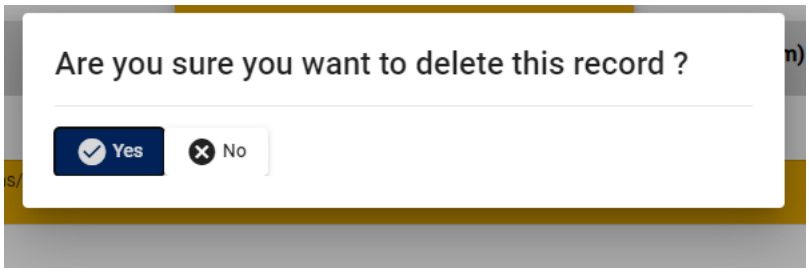
2. Click “Edit” to modify the receipt details.



3. After making the required changes, click “Save” as shown below.



4. To delete a receipt, click “Delete” as shown below.
5. The system displays the message below. Click “Yes” to delete the receipt.



2.5.4 Denied Partner Receipt

1. An email notification will be sent to the grantee when the program area denies a receipt submission. Below is a sample text for the email notification.

   Subject: PennDOT, PROGRAM NAME Receipt C92000XXXX - XXXXX Returned.

   Program Name:

   ESAID:
   Contract:
   Project Name:
   Receipt Number:

   The above-mentioned receipt has been returned. Please click on the following link to access the Partner Portal: https://apps.dced.pa.gov/esa-partner

   Under My Invoice/Receipts, click the "Details" link for the above-listed ESAID and view the comment(s) section for further information for receipts in "Denied" or "Rework" status. Receipts in "Rework" status may be revised and resubmitted. Receipts in "Denied" status cannot be revised.

   Below is a sample example of the email notification.

   Subject: PennDOT, BOA Federal Aviation Block Grant (ABG) eGrants Receipt C920001968 - 298049013 Returned.

   Program Name: BOA Federal Aviation Block Grant (ABG)
   ESAID: 202210184134
   Contract: C920001968
   Project Name: Runway Rehab 01-19
   Receipt Number: C920001968 - 298049013

   Above mentioned receipt has been returned.

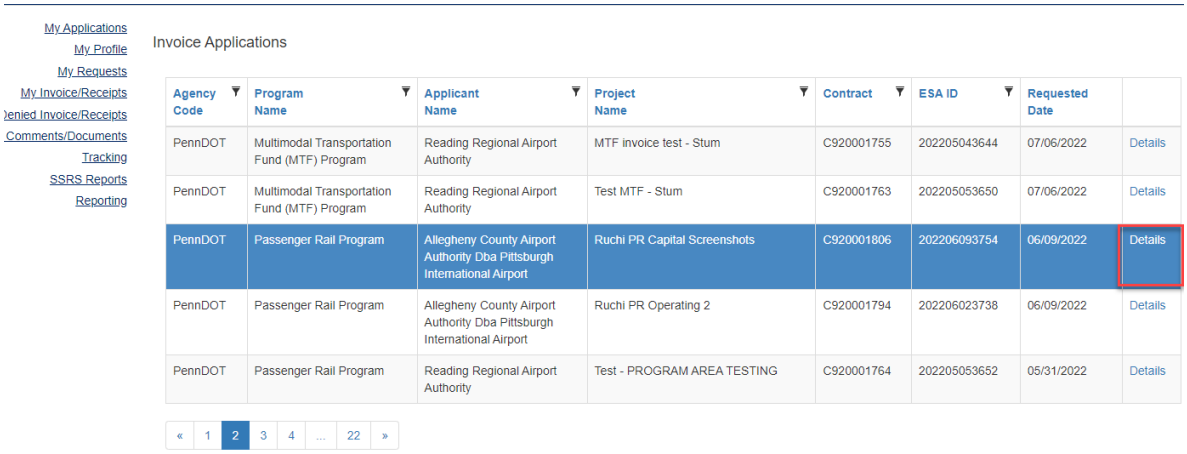
   Please click on the following link to access the Partner Portal: https://apps.uat.dced.pa.gov/esa-partner

   Under My Invoice/Receipts, click the "Details" link for the above-listed ESAID and view the comment(s) section for further information for receipts in "Denied" or "Rework" status.

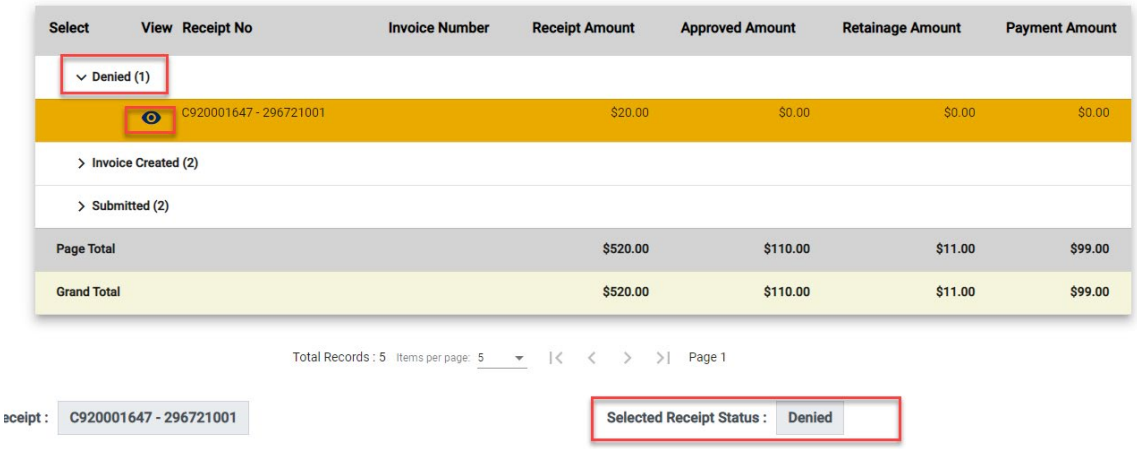
   Receipts in "Rework" status may be revised and resubmitted. Receipts in "Denied" status cannot be revised.

   Note: The email notification will be sent to the application contact email and the email address for the Keystone login user who submitted the receipt.

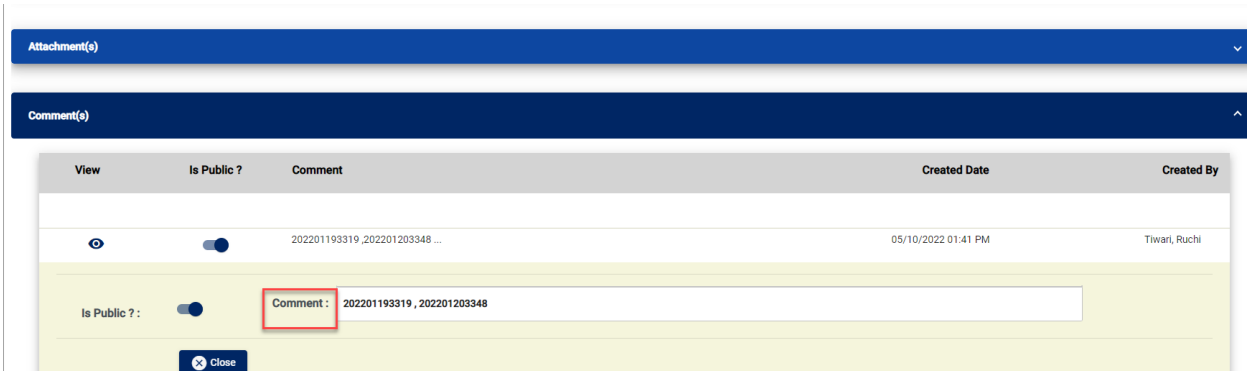
2. Click the "Details" link for the assigned contract id as shown below.



3. The Denied Receipts can be seen in the Partner Portal with the “Denied” status.



Note: The ‘Comments’ tab for the denied receipt lists the reason for the denial as shown below.



2.5.5 Rework Partner Receipt

1. An email notification will be sent to the grantee when the program area sends the receipt for the rework. Below is a sample text for the email notification.

   Subject: PennDOT, PROGRAM NAME Receipt C92000XXXX - XXXXX Returned.

Program Name:

ESAID:
Contract:
Project Name:
Receipt Number:

The above-mentioned receipt has been returned. Please click on the following link to access the Partner Portal: https://apps.dced.pa.gov/esa-partner
Under My Invoice/Receipts, click the "Details" link for the above-listed ESAID and view the comment(s) section for further information for receipts in "Denied" or "Rework" status. Receipts in "Rework" status may be revised and resubmitted. Receipts in "Denied" status cannot be revised.

Below is a sample example of the email notification using the BOA ABG program.

Subject: PennDOT, BOA Federal Aviation Block Grant (ABG) eGrants Receipt C920001968 - 298049013 Returned.

Program Name: BOA Federal Aviation Block Grant (ABG)
ESAID: 202210184134
Contract: C920001968
Project Name: Runway Rehab 01-19
Receipt Number: C920001968 - 298049013

Above mentioned receipt has been returned.

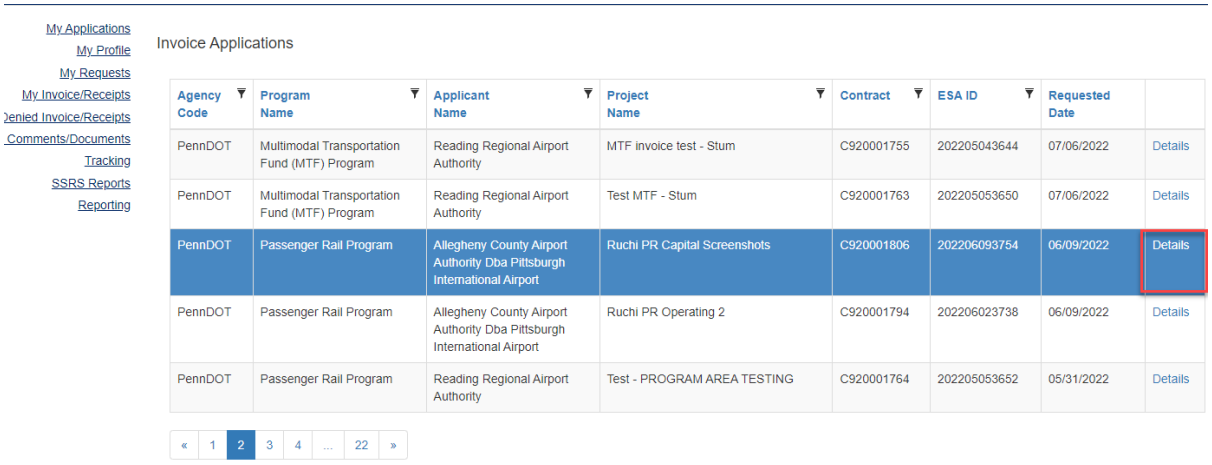
Please click on the following link to access the Partner Portal: https://apps.uat.dced.pa.gov/esa-partner

Under My Invoice/Receipts, click the "Details" link for the above-listed ESAID and view the comment(s) section for further information for receipts in "Denied" or "Rework" status.

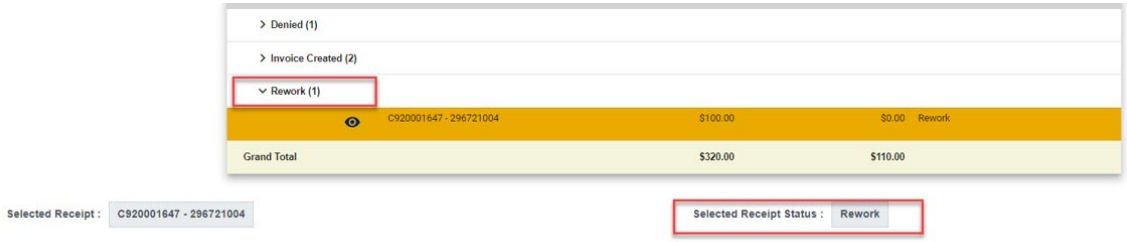
Receipts in "Rework" status may be revised and resubmitted. Receipts in "Denied" status cannot be revised.

Note: The email notification will be sent to the application contact email and the email address for the Keystone login user who submitted the receipt.

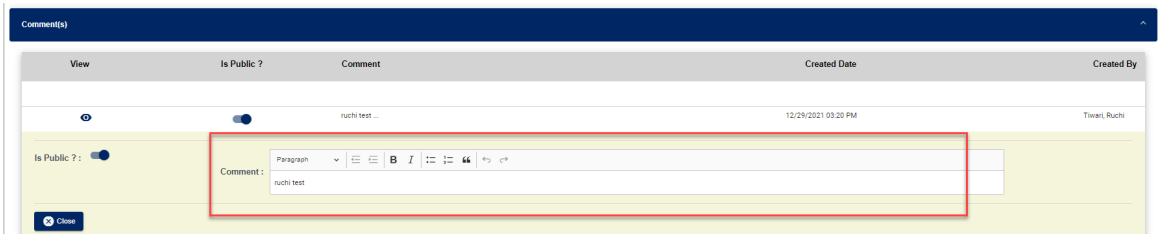
2. Click the "Details" link for the assigned contract id as shown below.



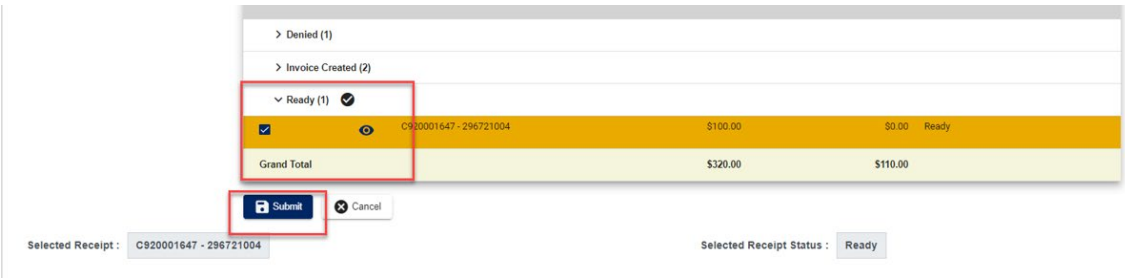
3. The rework receipts can be seen in the Partner Portal under the “Rework” tab as shown in the below screenshot.



4. Users can see the comments entered by internal users under the “Comment(s)” tab as shown below.



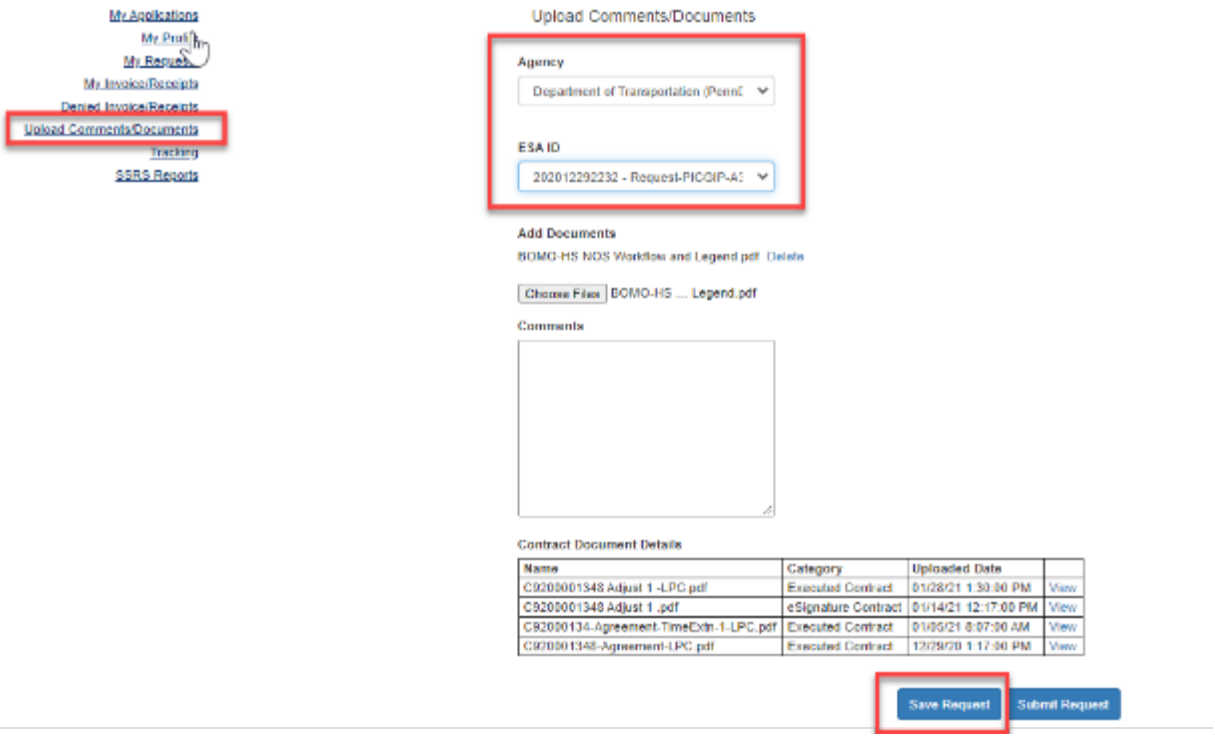
5. Based on the provided comment, the user clicks “Edit” to make the required changes such as amount, attachment, etc., and submits it back to the program area as shown below. After making the required changes, when the user clicks “Save” the system changes the receipt status to “Ready.”
6. To submit the receipt again, the user selects the receipt no and clicks “Submit.”



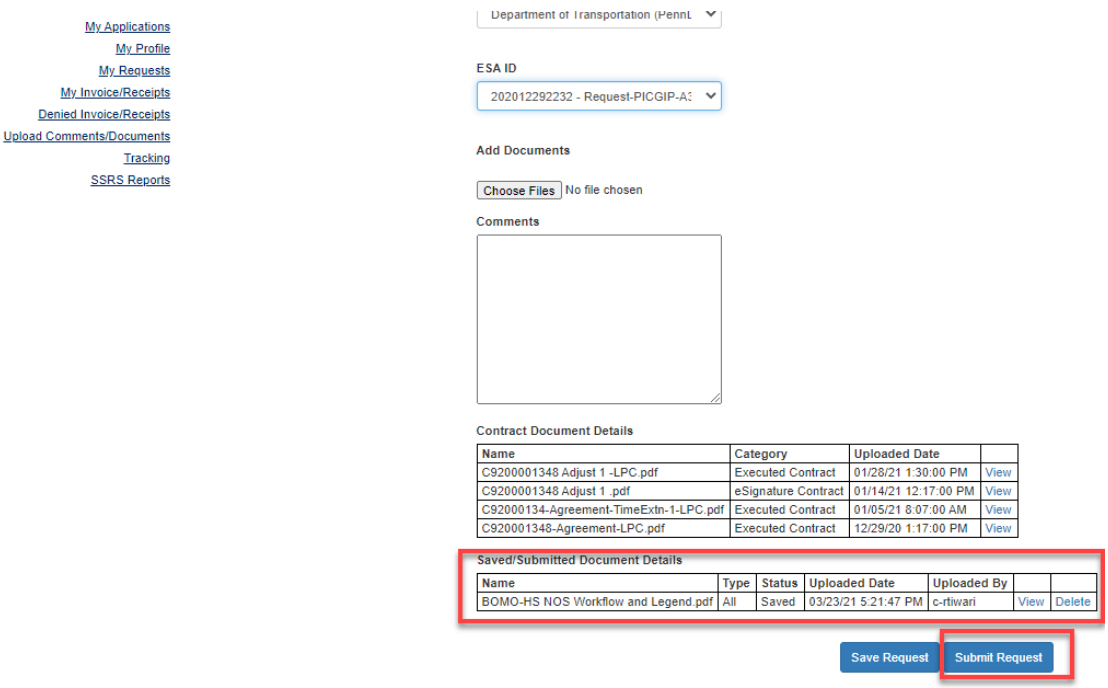
2.6 Upload Comments Documents

This option allows users to upload documents as requested by the program area.

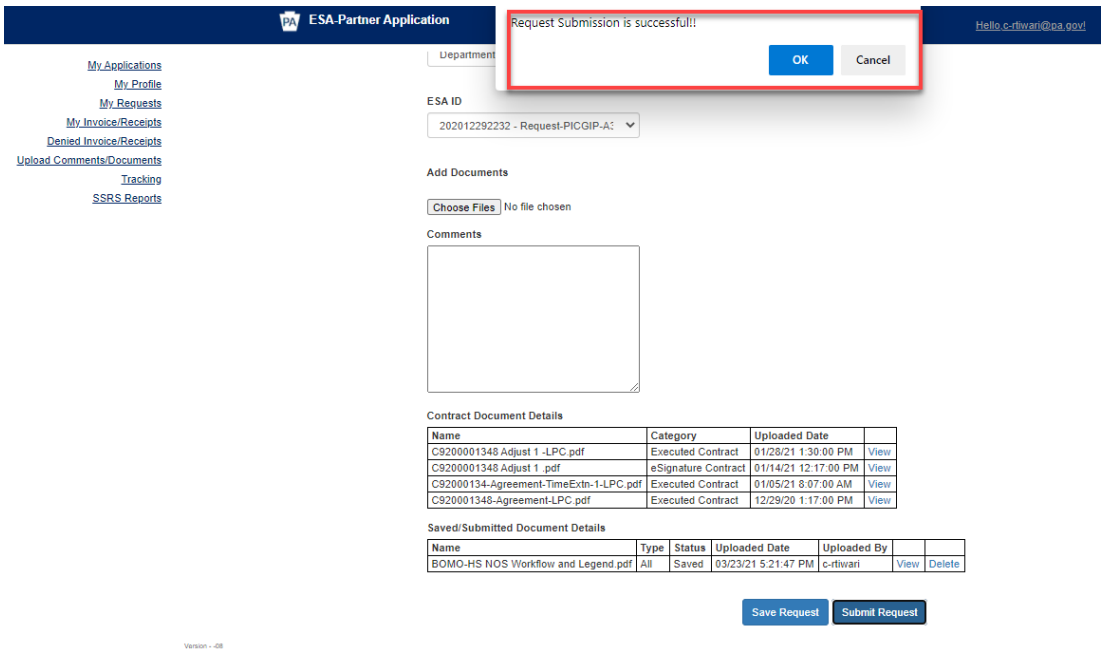
1. To upload documents, Grantee clicks on the Upload Comments/Documents button.
2. Select the Agency and ESA ID.
3. Click Browse to upload documents.
4. Enter a text under the Comments field and click “Save Request” to save the request or “Submit Request” to submit the request to the Program area.



a. If the user clicks Save Request, the system will display the saved request under “Saved & Submitted Document Details” as shown below. Users can submit the saved request by clicking on the “Submit Request” button.

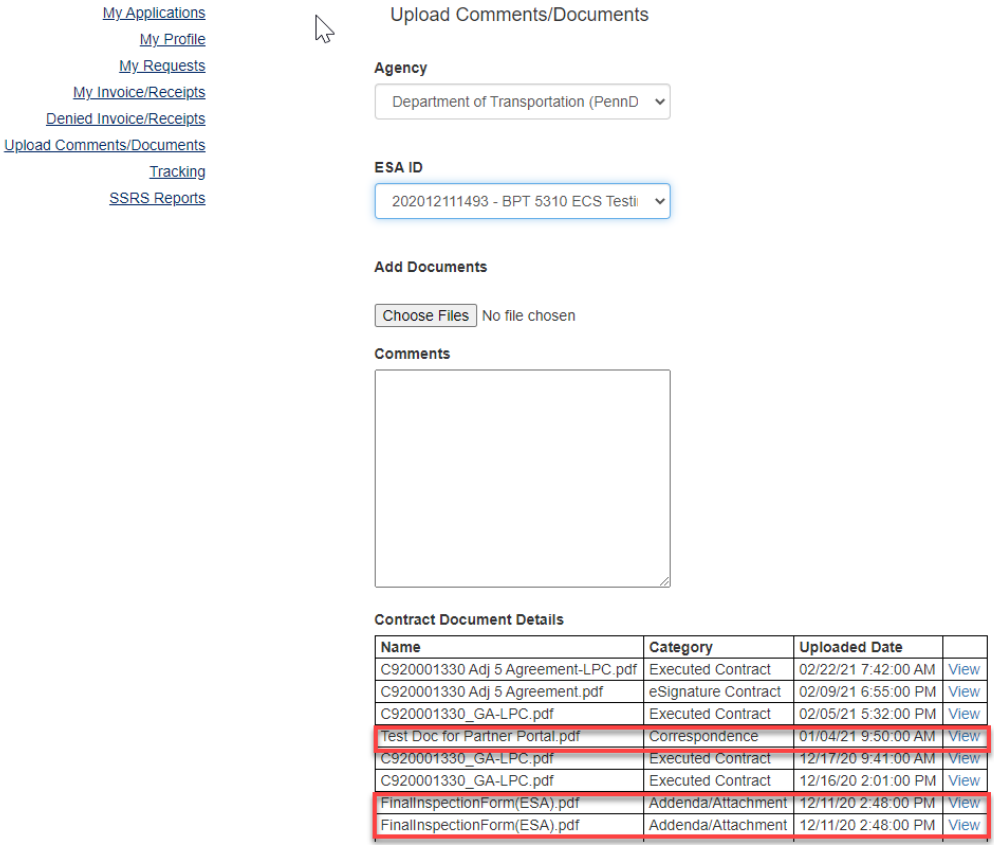


b. If the user clicks Submit Request, the system will display the pop-up message "Request Submission is successful!"



c. Click OK and this will submit the request to the Program Area. The system will display the submitted request under "Saved & Submitted Document Details" as shown below.

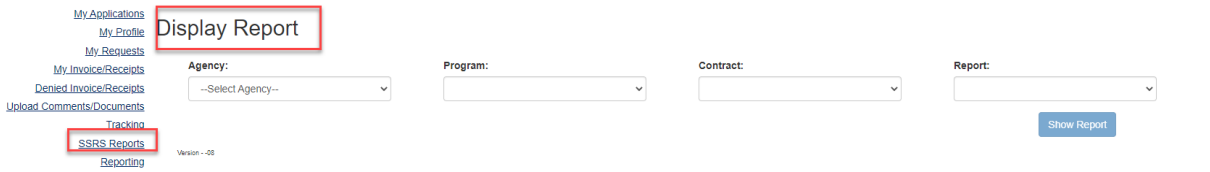
- Partner can view documents shared by the program area, such as Executed Contracts, Addenda/Attachment (application attachments), Correspondence, Financial Documents, etc., under the Upload Comments/Documents section in the Partner Portal.


My Applications
My Profile
My Requests
My Invoice/Receipts
Denied Invoice/Receipts
Upload Comments/Documents
Tracking
SSRS Reports
Upload Comments/Documents
Agency
Department of Transportation (PennD
ESA ID
202012111493 - BPT 5310 ECS Testi
Add Documents
Choose Files
No file chosen
Comments
Contract Document Details
Name
Category
Uploaded Date
C920001330 Adj 5 Agreement-LPC.pdf
Executed Contract
02/22/21 7:42:00 AM
View
C920001330 Adj 5 Agreement.pdf
eSignature Contract
02/09/21 6:55:00 PM
View
C920001330_GA-LPC.pdf
Executed Contract
02/05/21 5:32:00 PM
View
Test Doc for Partner Portal.pdf
Correspondence
01/04/21 9:50:00 AM
View
C920001330_GA-LPC.pdf
Executed Contract
12/17/20 9:41:00 AM
View
C920001330_GA-LPC.pdf
Executed Contract
12/16/20 2:01:00 PM
View
FinalInspectionForm(ESA).pdf
Addenda/Attachment
12/11/20 2:48:00 PM
View
FinalInspectionForm(ESA).pdf
Addenda/Attachment
12/11/20 2:48:00 PM
View

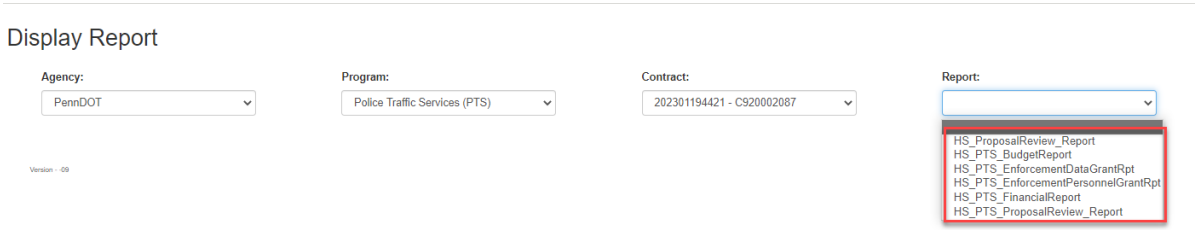
2.7 SSRS Reports

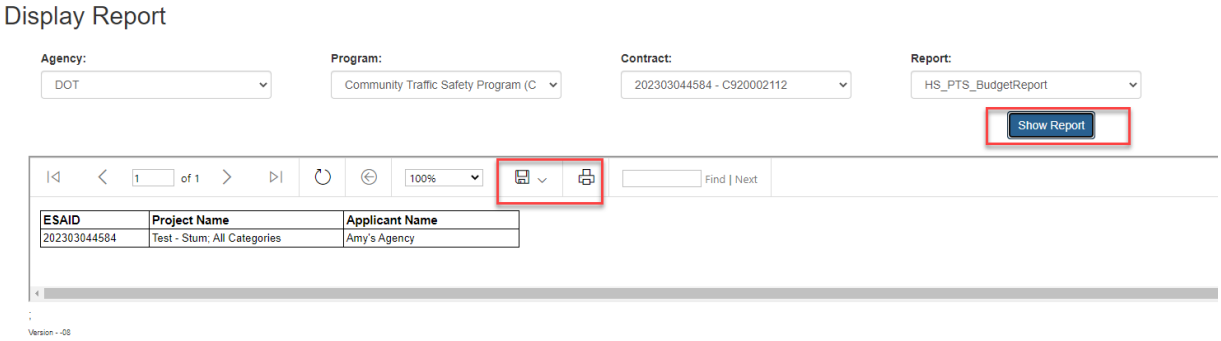
Users with the "Show Reports" role and access to the grant can view/generate the SSRS reports from the partner portal **for reports configured with external access.** The reports are grant-level only, for any grants assigned to the user. Below is an example of the configured SSRS reports for the Highway Safety programs.

- To access the SSRS report, click the "SSRS Reports" link in the partner portal.

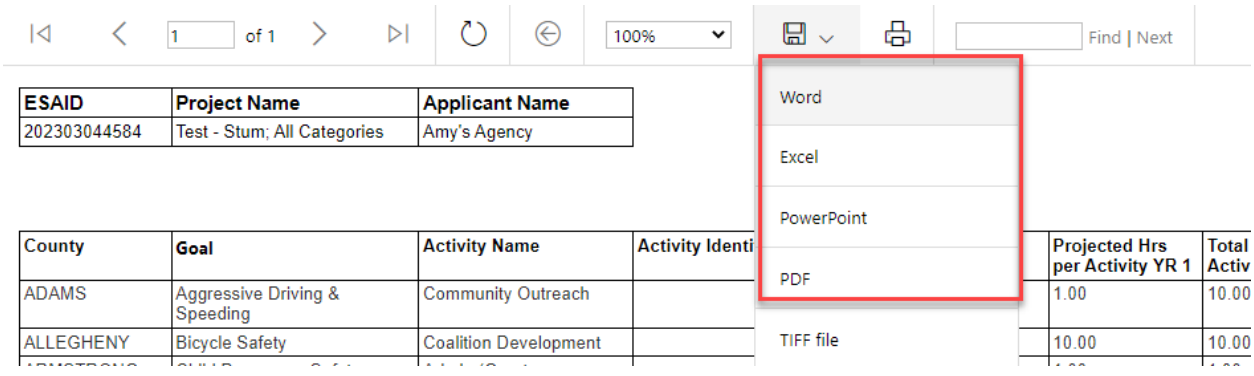


- Select "Agency," "Program," "Contract," and "Report." Click "Show Report" as shown below.
  Note: Currently, all configured reports for the program show, regardless of the selected program.





- Report can be exported to Word, Excel, PDF, etc. using the option highlighted below.



Programs with SSRS reports configured include:

- Highway Safety Grant Program (HSGP)
- Highway Safety Community Traffic Safety Program (CSTP)
- Highway Safety Police Traffic Services (PTS)
- Ports Operating and Capital

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3.0 Manage Access Requests/Roles in ESA – Internal Users

Program user logs into ESA Internal. The Partner Tools section is used to manage access requests/roles in ESA. The below sub-sections describe all areas under Partner Tools in ESA.

Types of partner portal access include the following categories:

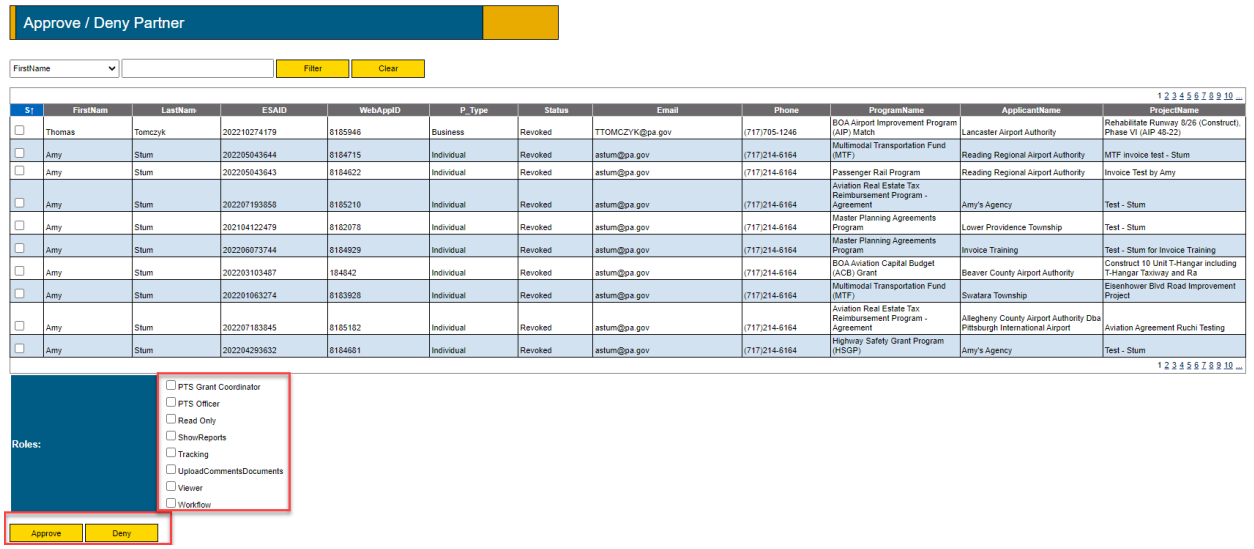
- **PTS Grant Coordinator:** It allows users to access the highway safety enforcement tracking and enforcement reimbursement report for the PTS program.
- **PTS Officer:** It allows users to access the highway safety *officer* enforcement tracking and enforcement reimbursement report for the PTS program.
- **Read only:** It allows users to view the submitted applications until "In Legal Process" status and process invoices. Users won't be able to edit applications or upload documents/comments in the Partner Portal. Users will be able to create and submit receipts.
- **Show Reports:** It allows users to view/generate the SSRS reports from the partner portal.
- **Tracking:** It allows users to access the tracking module and submit information.
- **Upload Comments Documents:** It allows users to upload documents as requested by program staff. Documents will be viewable in Electronic Storage and Comments will be viewable in Comments.
- **Viewer:** It allows users to view the application at any point within the workflow and be Read-Only.
- **Workflow:** It allows users access to ESA workflow. It is the only option for the user to be able to 'resubmit' the application review back to the program staff when it has been sent for Grantee Review/Stop 4.

3.1 Approve Partner

When the Partner submits a request for access to a new application, the Program User will see the Partner's request under the Approve Partner section in the Partner Tools.

To Approve the Partner's request, click the checkbox, select the appropriate role(s), and click "Approve."

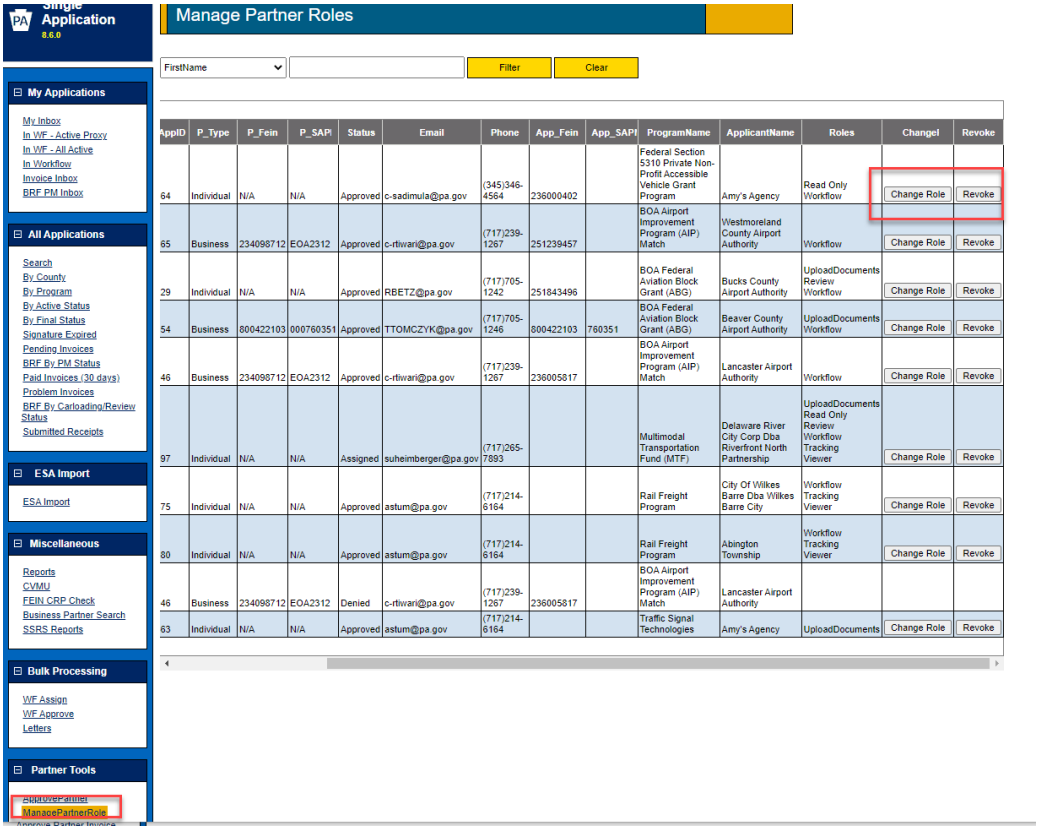
Note: The user can bulk approve for the same role access.



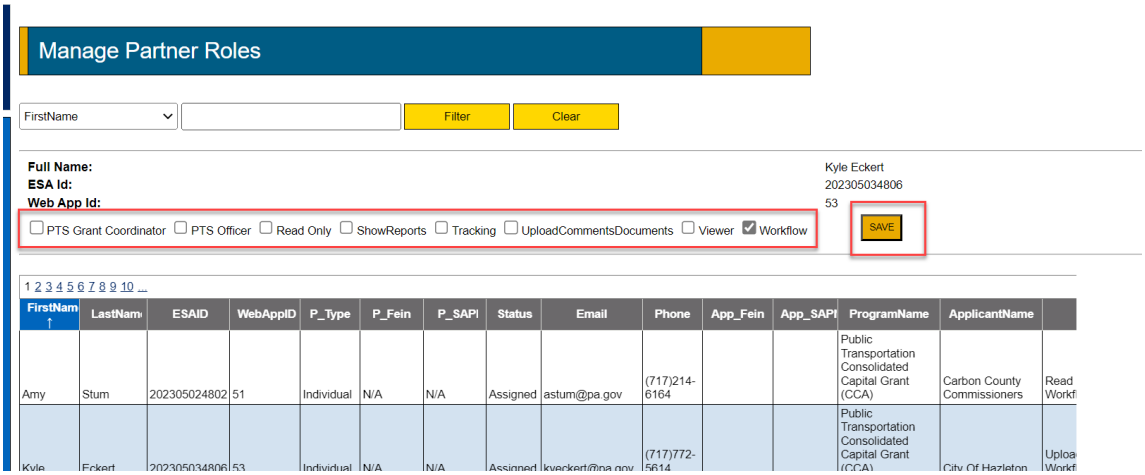
To deny the Partner's request, click the checkbox and click the "Deny" option.

3.2 Manage Partner Role

To change a partner's assigned role or to revoke the partner's role, the Program User clicks on the Manage Partner Role link under the Partner Tools section.

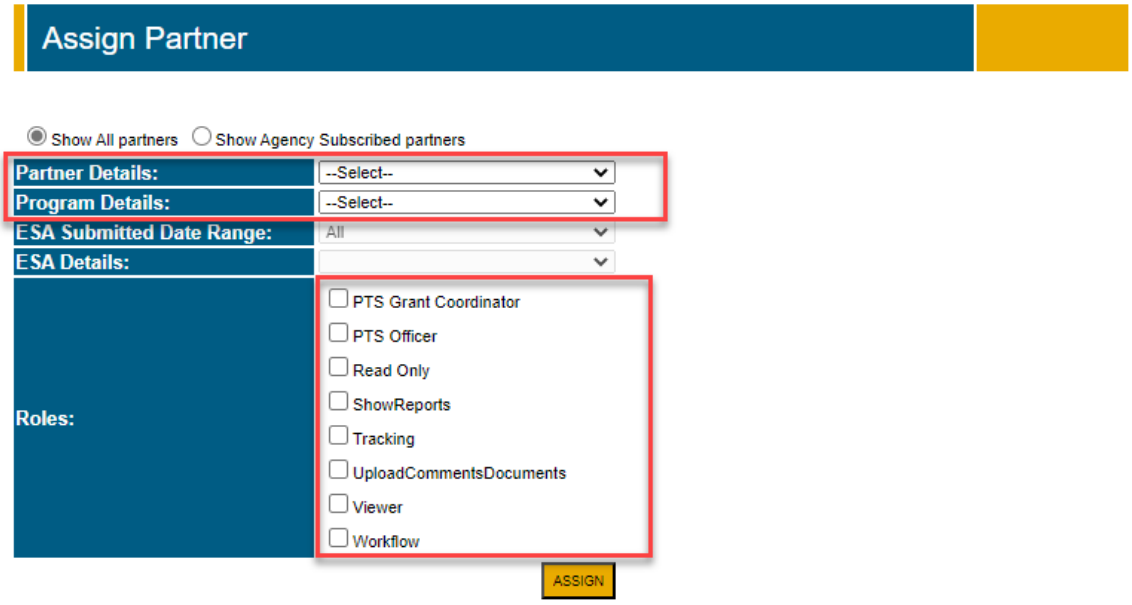


- To revoke the partner's access, click on the Revoke button. The system will revoke the partner's access.
- To change a partner's existing role, click on the Change Role button. The system will display the role(s) assigned to the partner. Check or Uncheck the role boxes to provide or remove the respective roles and click Save. Based on the action performed by the Program User, the system changes the partner's role.



3.3 Assign Partner

The assign partner option is used to assign the Application to the external partner from Partner Tools in ESA-DOT Internal. Select Partner, Program, ESA Details, and Roles and click Assign as shown in the below screenshot.

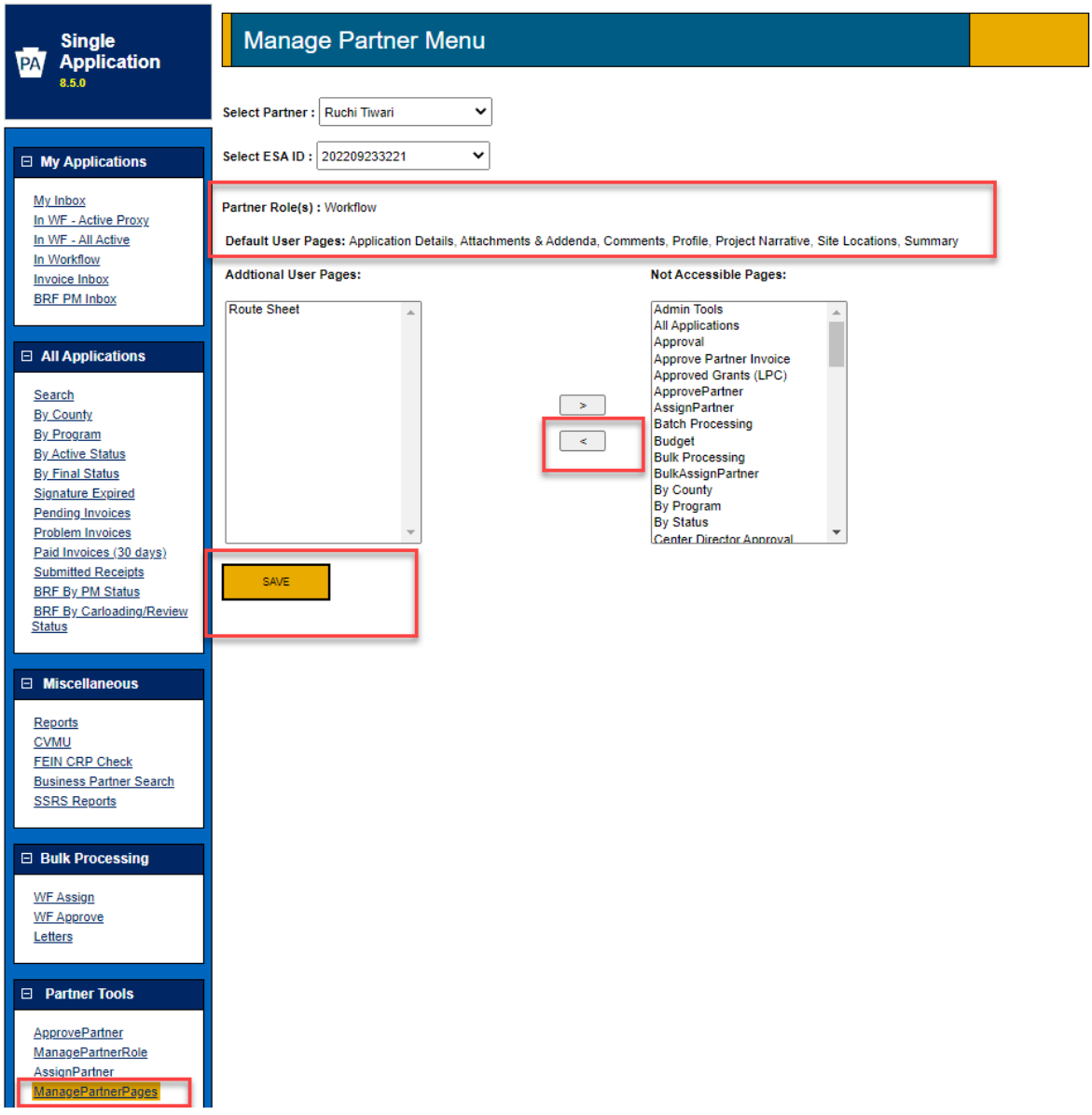


NOTE: Anyone who is in the workflow can do the assignment for the applicant.

3.4 Manage Partner Pages

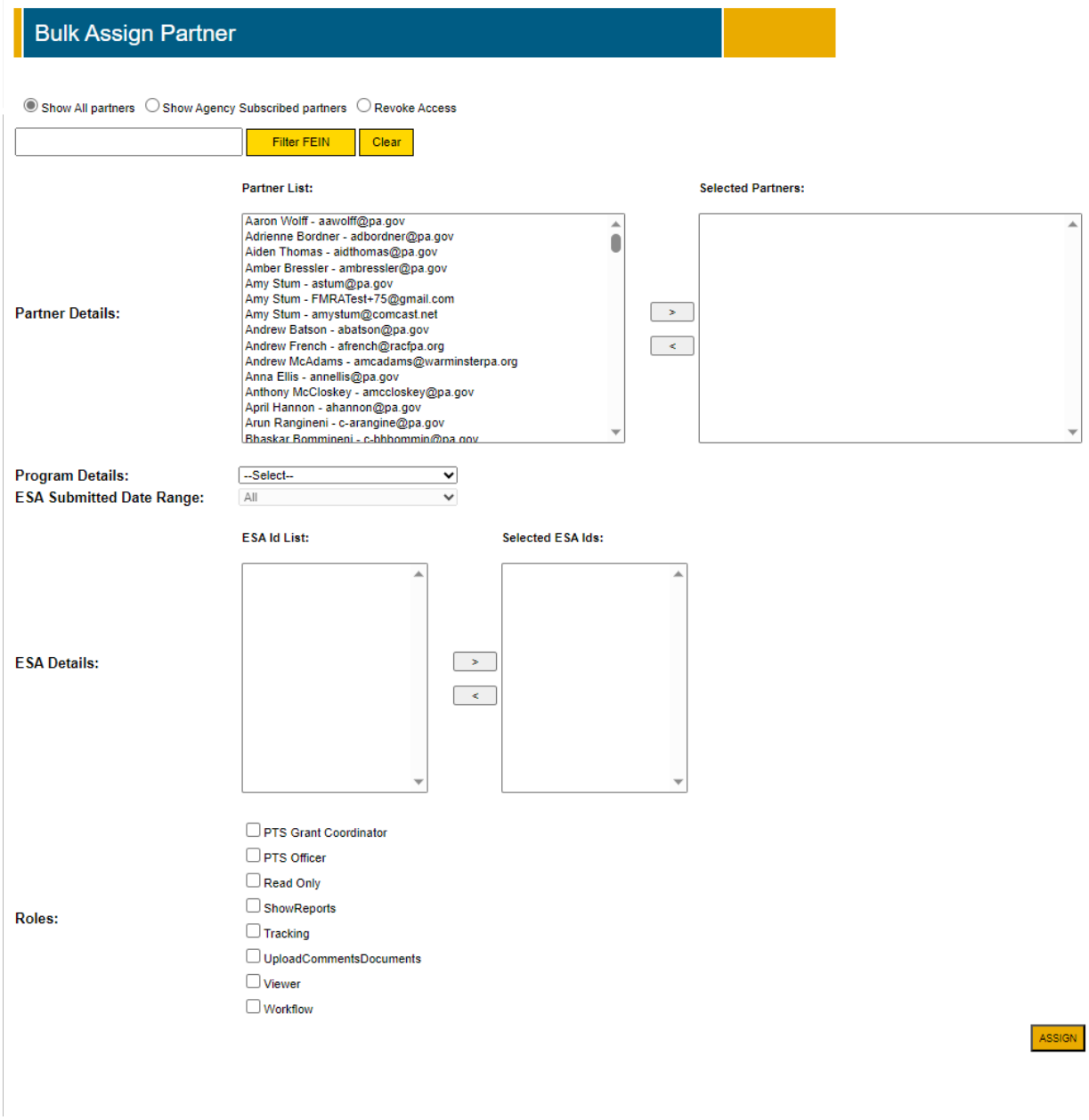
The “Manage Partner Pages” option is used to provide Partner access to additional pages in ESA. The default user pages for Read-Only and Upload Documents and Workflow role(s) are Application Details, Attachments & Addenda, Comments, Profile, Project Narrative, Site Locations, and Summary.

- Select Partner detail and ESA ID.
- Move the pages listed under “Not Accessible Pages (for example, RouteSheet)” to the “Additional User Pages” section using the left arrow as shown in the below screenshot.
- Click Save. The system displays the message “Preferences are saved successfully.”



3.5 Bulk Assign Partner

This option is used to bulk assign applications to the external partner from Partner Tools in ESA-DOT Internal. Select applications, partner details, and required role(s), and click Assign as shown in the below screenshot.

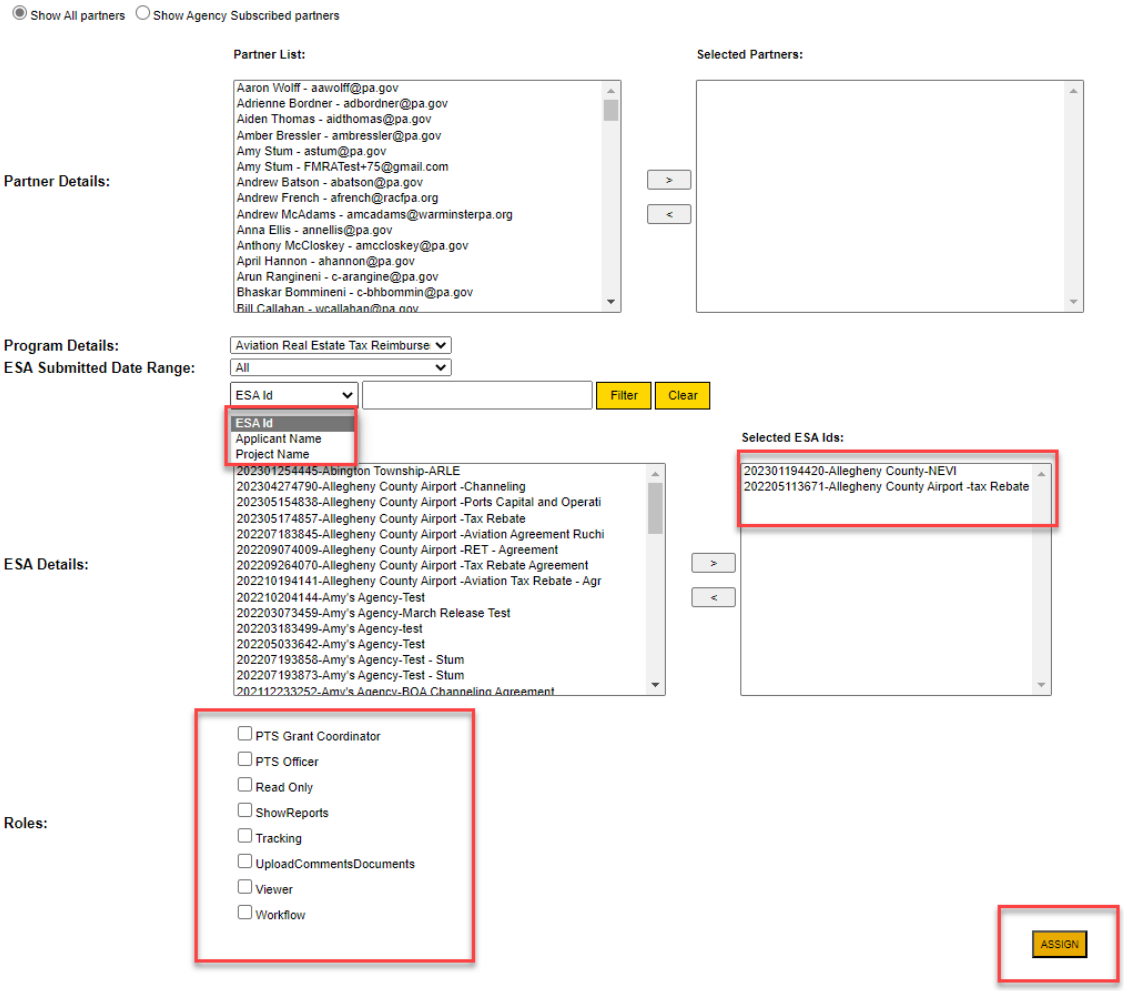


The below screenshots show the ESA screen when multiple users are assigned to multiple applications (ESA details).

NOTES:

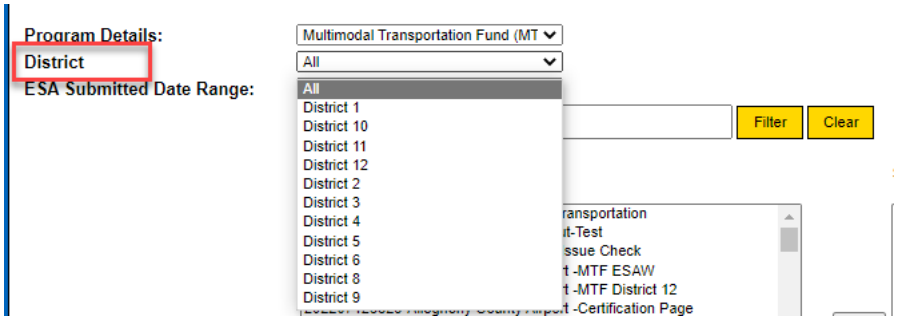
- Applications can be filtered by ESA ID, Applicant Name, and Project Name.

- Partners can be filtered by FEIN

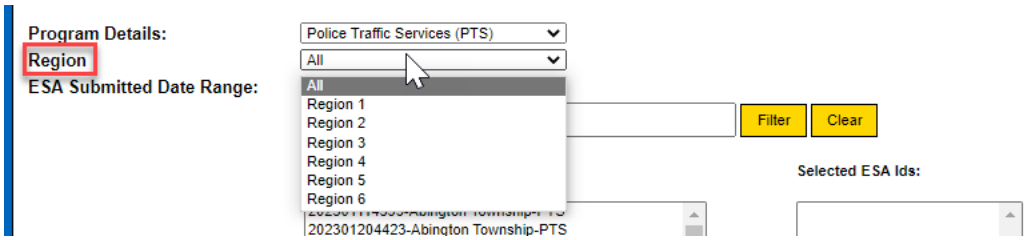


Notes:

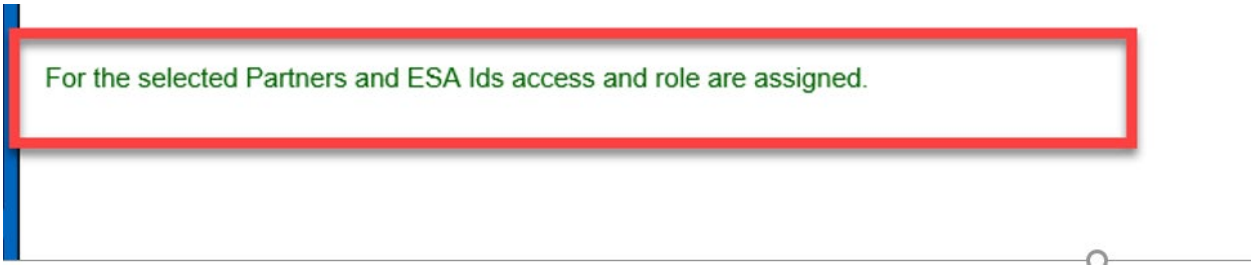
- A district filter functionality is enabled for ARLE, GLG, TST, and MTF programs as shown below.



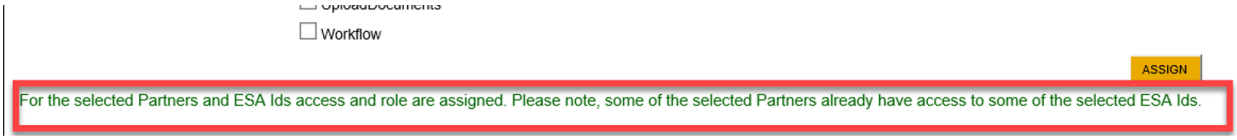
- A region filter functionality is enabled for CTSP and PTS programs.



The system displays the success message “For the selected Partners and ESA IDs access and role are assigned” when Program users click Assign after making all selections as shown below.

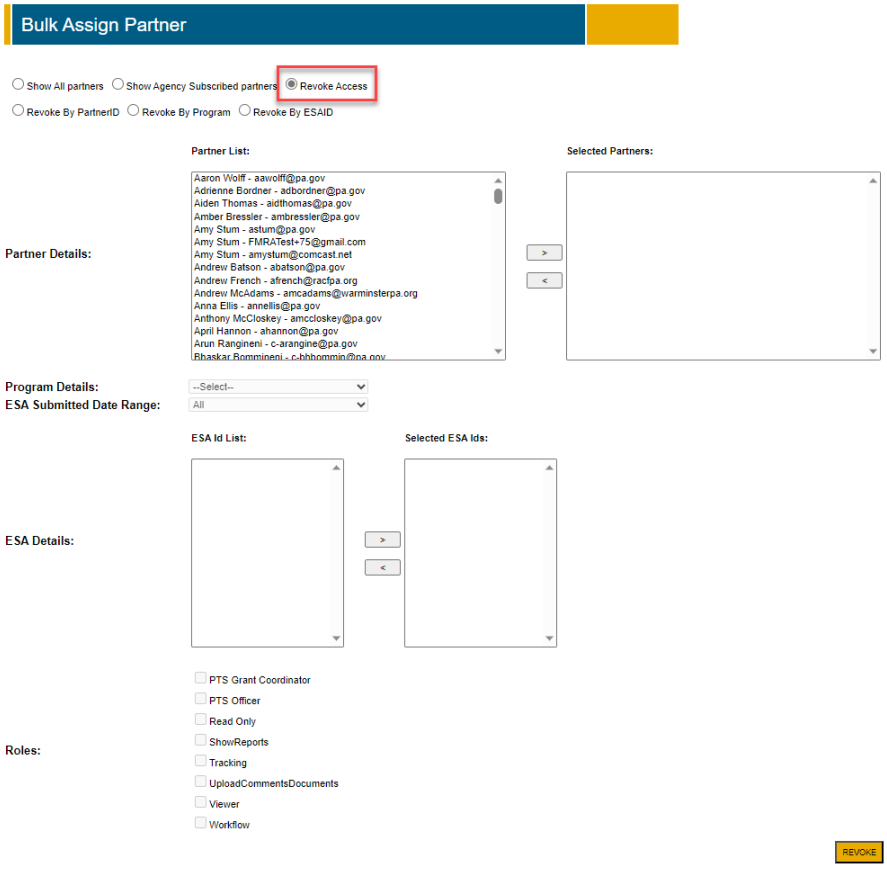


If the user was already assigned to selected applications, the system will display the message “For the selected Partners and ESA IDs access and role are assigned. Please note, some of the selected Partners already have access to some of the selected ESA IDs” as shown below.

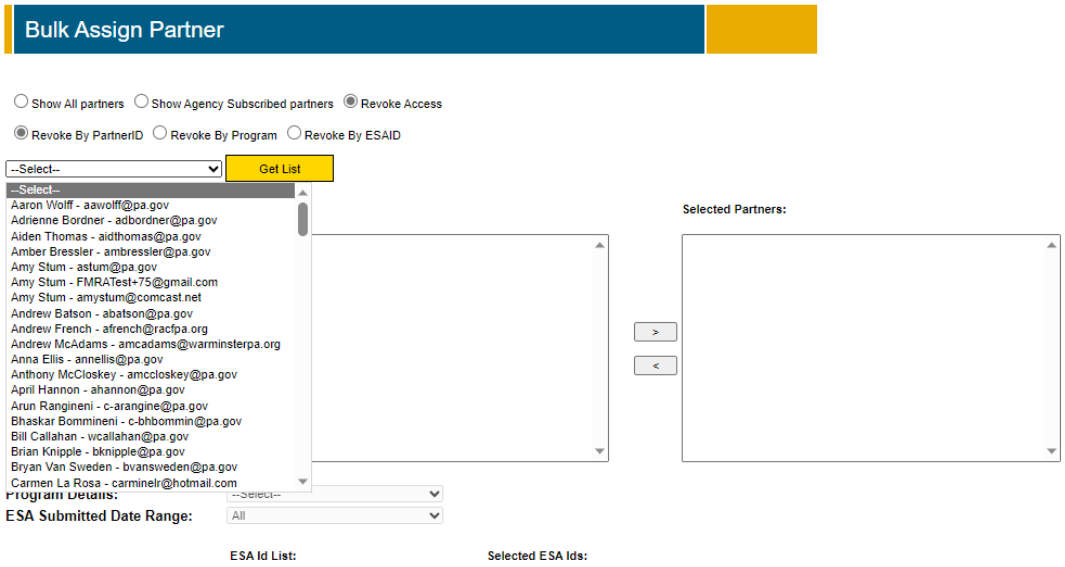


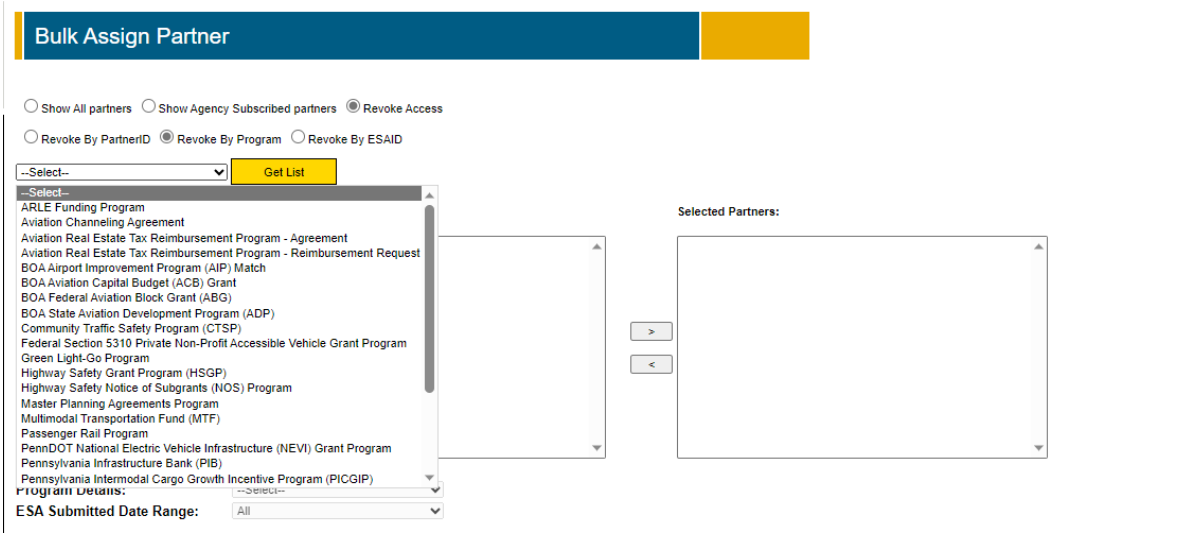
3.6 Revoke Partner

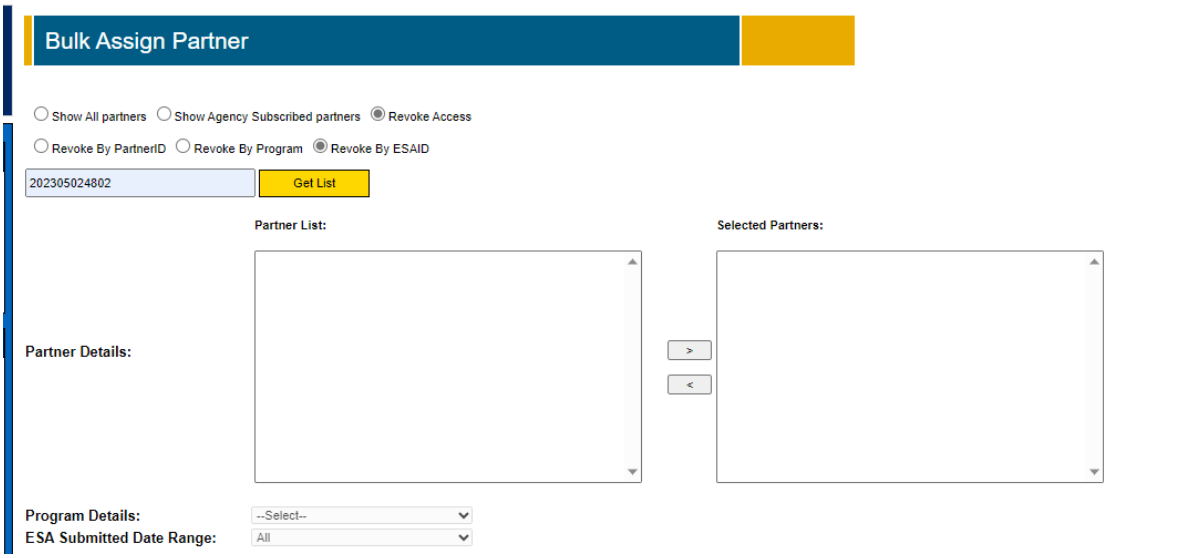
This option is used to remove user access from multiple applications. When selecting ‘Revoke’, additional options will appear to filter the user list by ParterID, Program, or ESAID



After selecting the desired filter, the dropdown list will appear for PartnerID and Program options, enter the ESAID in the field for that filter.

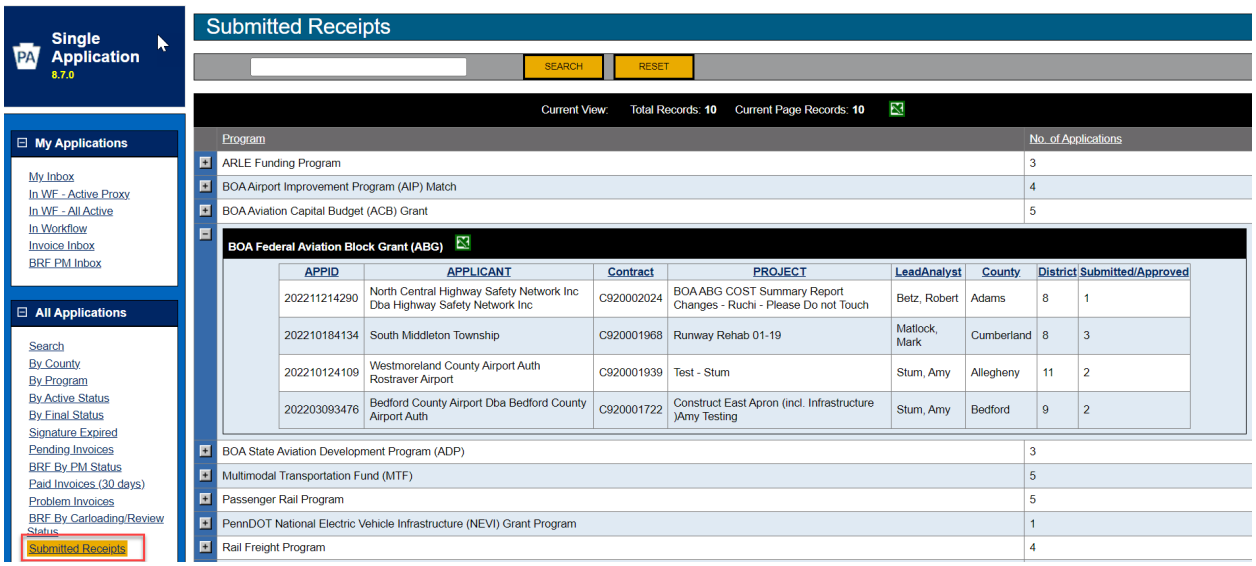




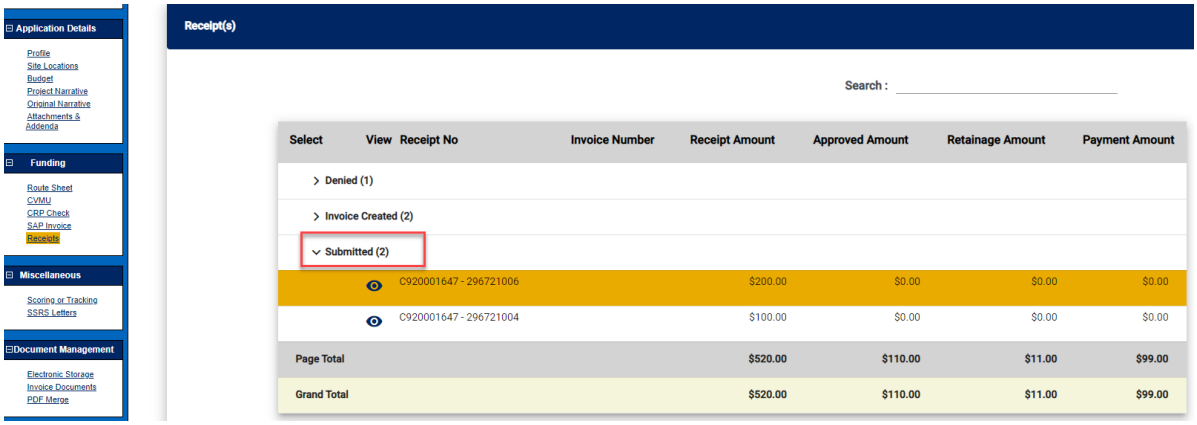


3.7 Approve Partner Receipt

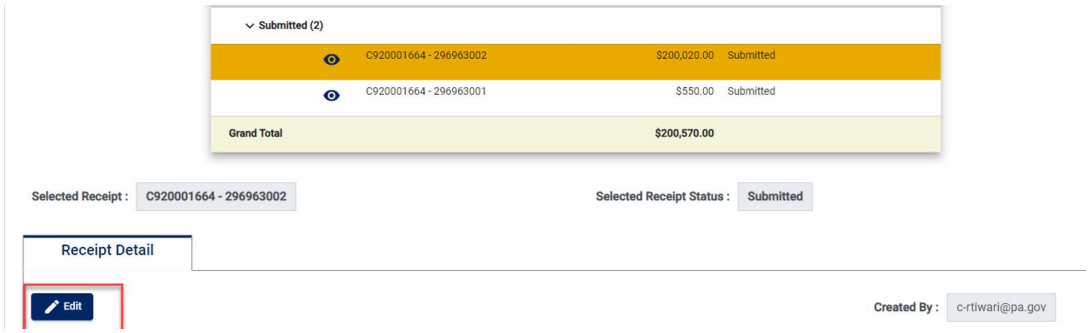
1. Program user clicks the “Submitted Receipts” link under the All Applications section. The “Submitted/Approved” column displays the sum of all submitted and approved receipts.



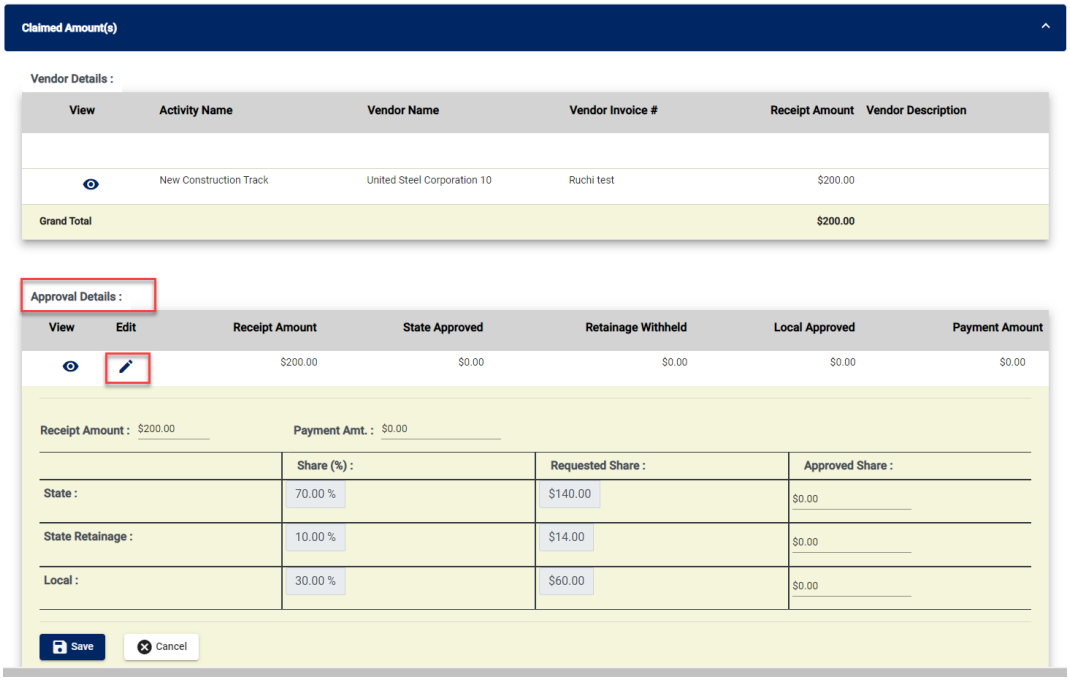
2. Select the appropriate ESA ID. The system displays the screen as below. Click “Receipts” under the Funding section.



3. In the case of multiple receipts, click the eye icon for a receipt. Click “Edit” to enter the approved amount(s)/share(s) based on the program-specific requirements as shown below.



4. Click “Edit Pencil” under the “Approval Details” section.



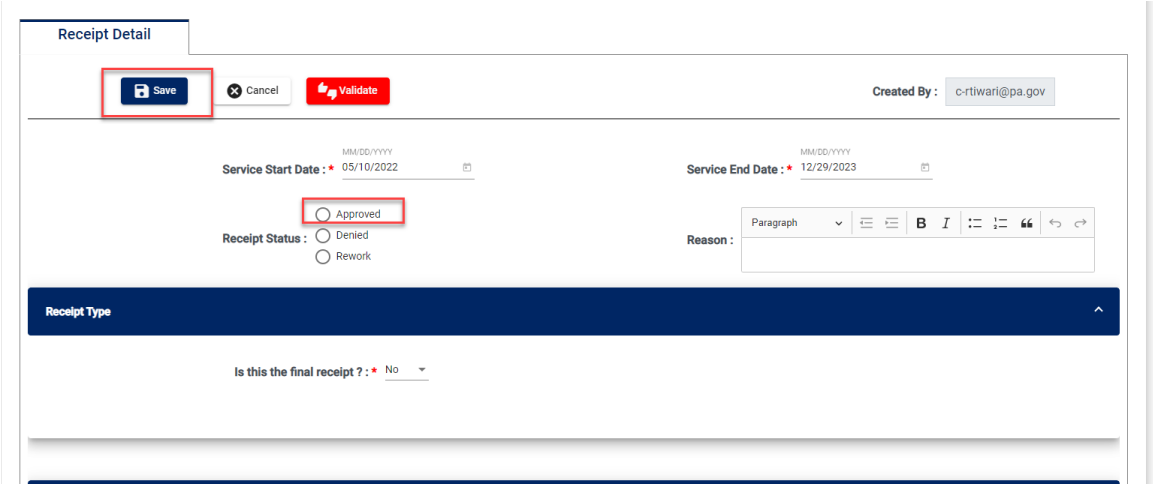
5. Enter the approved amount(s)/share(s) based on the program-specific requirements. Click “Save.”

Notes:

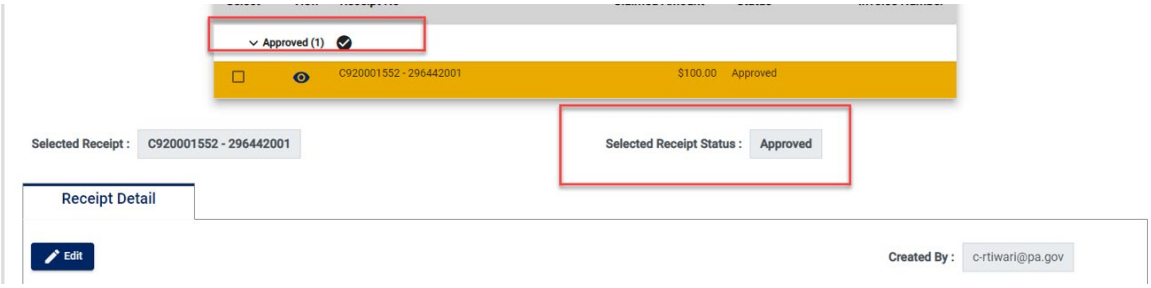
- The system calculates the requested share amount(s) based on program-defined requirements for Fund Share calculations.; The user can modify the amounts if needed. The below example applies to the Rail Freight program only.

- The approval details section has program-specific fields and validations.

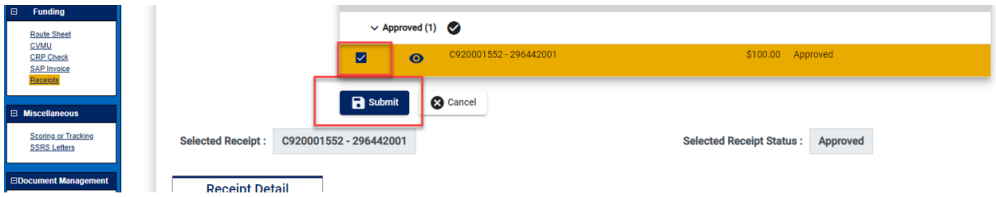
6. Click the “Approved” radio button and then click “Save.”



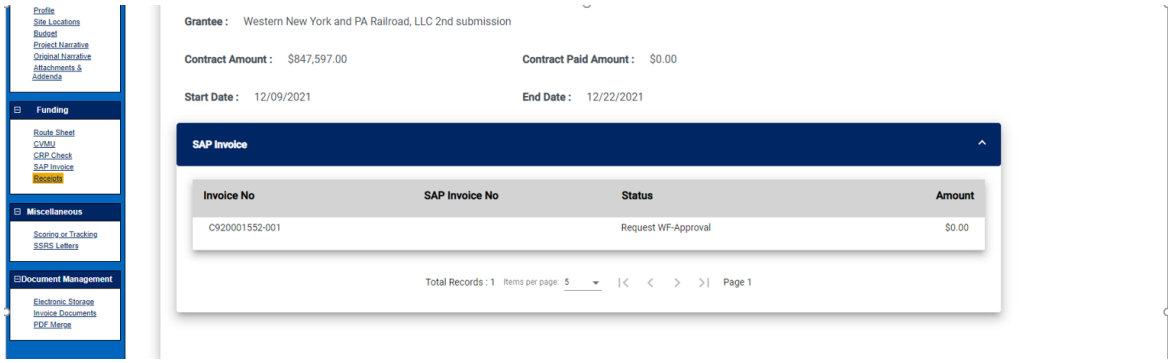
7. The system will display the change of the receipt status from “Submitted” to “Approved” as shown below.

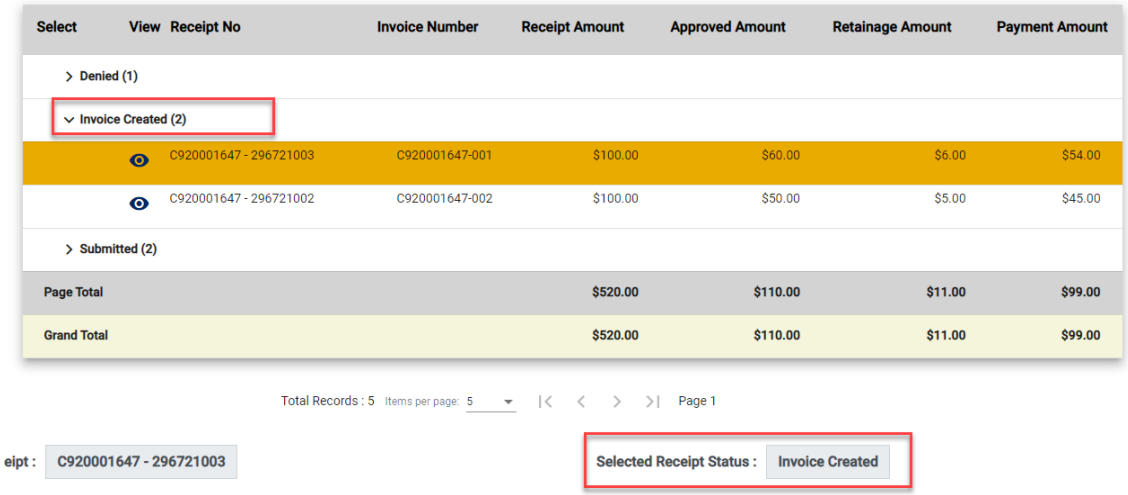


8. The system displays the “Approved” status via the partner portal for the same receipt.
9. To initiate the invoice workflow process, select the checkbox next to the eye icon and click “Submit” as shown below. To combine multiple receipts into a single invoice, select the checkbox for each receipt and click “Submit.”



10. The system will display the change of the receipt status from “Approved” to “Invoice Created” as shown below. The “SAP Invoice” tab will display the invoice number and status as “Request WF-Approval.”

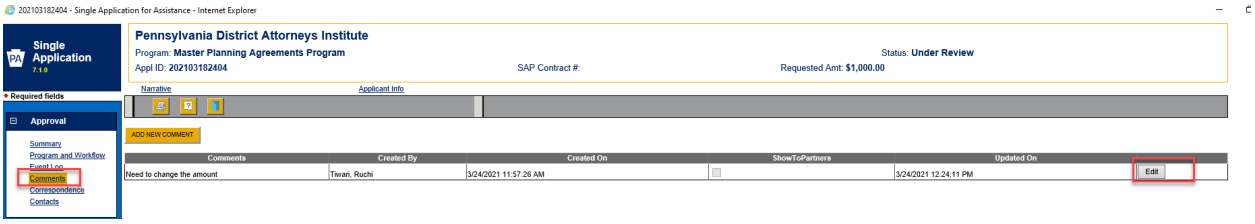




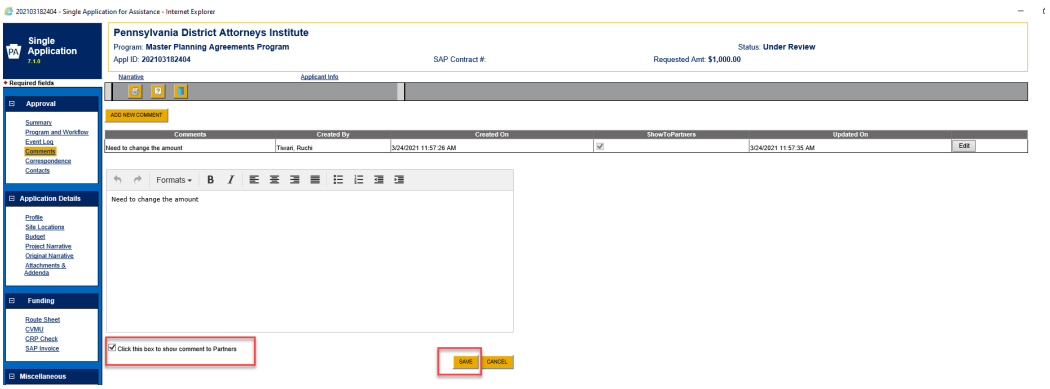
11. The system displays the “Invoice Created” status via the partner portal for the same receipt as shown below. The SAP Invoice” tab displays the invoice number and status as “Request WF-Approval” via the partner portal.

3.8 Comments and Documents to Share with Grantee

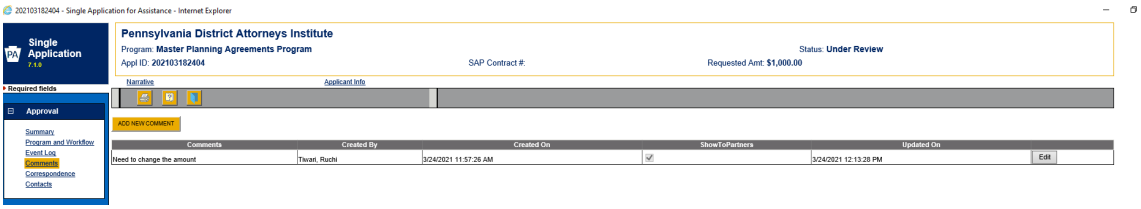
Internal users can select comments and share them with the grantee by clicking the “Edit” button below.



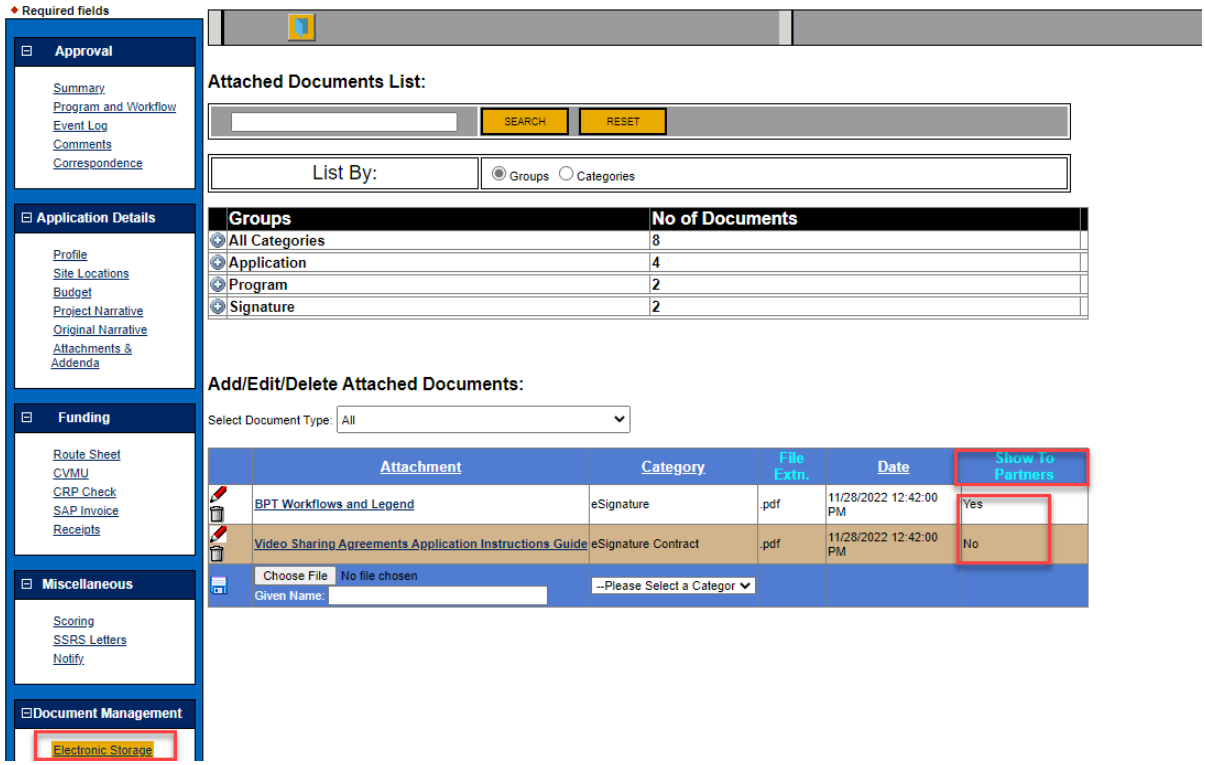
Click the checkbox “Click this box to show comments to Partners” and then click Save.



The system will display the “Show to Partners” flag checked as shown below.



Internal users can select documents [i.e., Addenda/Attachment (application attachments), Correspondence, Financial Documents] under the Electronic Storage section and share them with the grantee by setting the “Show to Partners” flag as “Yes” as shown below. Users can only share documents that are uploaded by them in Electronic Storage and users will only see the “Show to Partners” flag for those documents.



The internal user (lead analyst) will receive an email notification when items (comments/documents) are submitted by grantees via the partner portal. Below is a sample of the email notification:

From: ESA Application <noreply@pa.gov>
Sent: Monday, September 26, 2022 11:01 AM
To: Honasoge, Nataraj <c-nhonasog@pa.gov>; Gangam, Raghunath <c-rgangam@pa.gov>; Joshi, Girish <gjoshi@pa.gov>
Subject: Aviation Channeling Agreement New eGrants Comments/Documents have been submitted. ESAID: 202209264069

Program Name: Aviation Channeling Agreement
Applicant: North Central Highway Safety Network, Inc
ESAID: 202209264069
Contract: No Contract Number
Project Name: Aviation Channeling Agreement

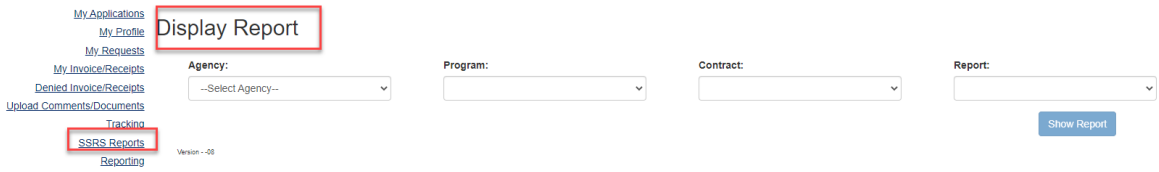
New Comments/Documents have been submitted.

Click here to start the application.

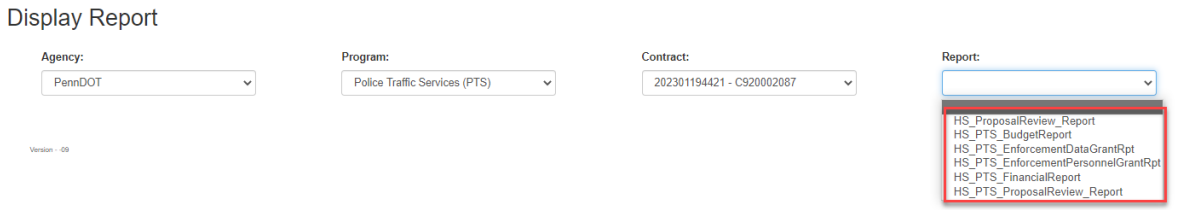
3.9 SSRS Reports

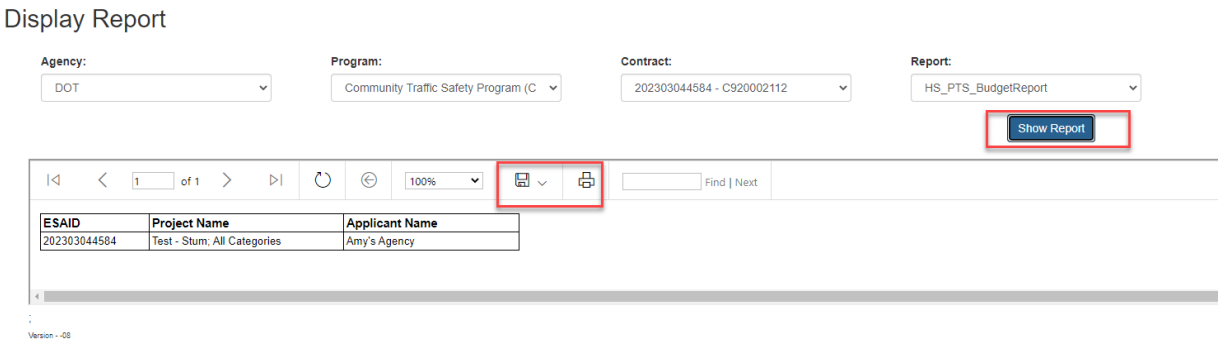
Users with the "Show Reports" role and access to the grant can view/generate the SSRS reports from the partner portal **for reports configured with external access.** The reports are grant-level only, for any grants assigned to the user. Below is an example of the configured SSRS reports for the Highway Safety programs.

- To access the SSRS report, click the "SSRS Reports" link in the partner portal.

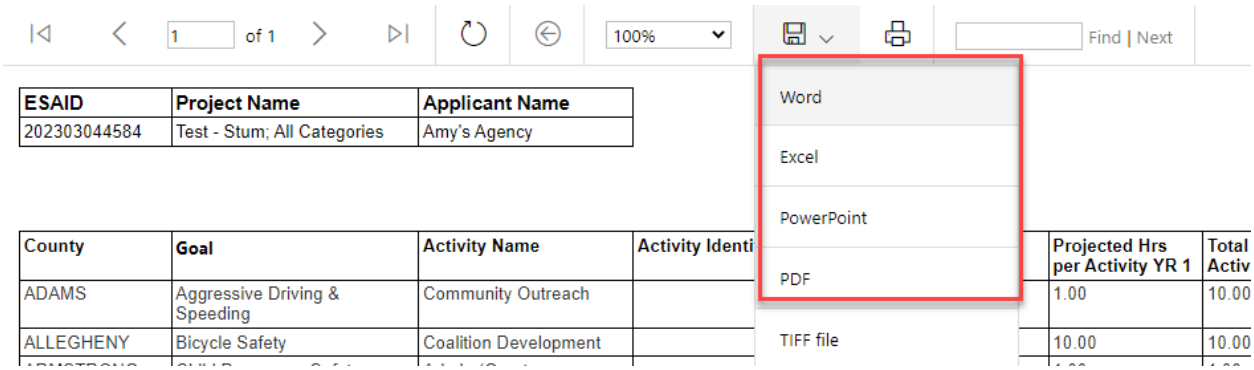


- Select "Agency," "Program," "Contract," and "Report." Click "Show Report" as shown below.





- Report can be exported to Word, Excel, PDF, etc. using the option highlighted below.



ESAID	Project Name	Applicant Name
202303044584	Test - Stum; All Categories	Amy's Agency

County	Goal	Activity Name	Activity Identi	Projected Hrs per Activity YR 1	Total Activ
ADAMS	Aggressive Driving & Speeding	Community Outreach		1.00	10.00
ALLEGHENY	Bicycle Safety	Coalition Development		10.00	10.00

Note: Currently, all configured reports for the program show, regardless of the selected program.