

Inventory Management and Reporting Instructions

Step 1. TxDOT Policy and Procedures Coordinator: Create and Submit [Inventory Management Document](#)

- a. Login to eGrants <https://www.txdot.gov/apps/egrants>
- b. Under **View Available Proposals**; click **VIEW PROPOSALS**; then click **APPLY NOW** for **Inventory Management for (Organization)**.

Proposals
To apply for an item listed below, select the item and click the **APPLY NOW** button.

Inventory Management for Texas Department of Transportation
Offered By: Texas Department of Transportation

Inventory Management Period:
09/01/2012-10/31/2013

Inventory Management Due Date:
10/31/2013

Description:
Inventory

APPLY NOW

Agreement
Please make a selection below to continue.

Create Inv

I AGREE **I DO NOT AGREE**

- c. Click **I AGREE** to create on the Agreement page. Click **I DO NOT AGREE** to Cancel.
- d. **Note:** The document will now be in your **My Tasks** on the **Home** page if you need to access later.

My Tasks
Export Results to: Screen Sort by: -- Select -- GO

Info	Document Type	Organization Name	Current Status	Date Received	Date Due
	Inventory Management	Texas Department of Transportation	Inventory-TxDOT-00487 Inventory Document Created	3/5/2013	10/31/2013

- e. On the **Inventory Management Menu** page, Click **VIEW FORMS** under **View, Edit and Complete Forms** section.

Inventory Management Menu
Document Information: [Inventory-TxDOT-00486](#)
[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Inventory Management	Texas Department of Transportation	Policy and Procedures coordinator	Inventory Document Created	09/01/2012 - 10/31/2013 10/31/2013 12:00PM CST

View, Edit and Complete Forms
Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS

Forms

Status	Page Name
	Inventory

- f. Click the [Inventory](#) link on Forms page.
- g. Complete the **INVENTORY** page for the Inventory Item.

INVENTORY

Name:

Description:

Type:

Serial #:

Acquisition Date:

Acquisition Cost:

16 of 500

Comments on Item

Comments:

Inventory Management and Reporting Instructions

- h. Save the page by clicking the **SAVE** button in upper right hand corner of the page.
- i. Add Project Manager(s) to the **Inventory Management Document**.
 - On the **Inventory Management Menu** page, Click **VIEW MANAGEMENT TOOLS** under **Access Management Tools** section.

- Click the **ADD/EDIT PEOPLE** link.

- Enter Project Manager(s) name(s) in the Person Search Field and click **SEARCH** to display results.
- Check the check box by their Name (Person) and set Role as Project Manager, click **SAVE** to save page.


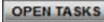
- j. On the **Inventory Management Menu** page, Click **VIEW STATUS OPTIONS** under **Change the Status** section.

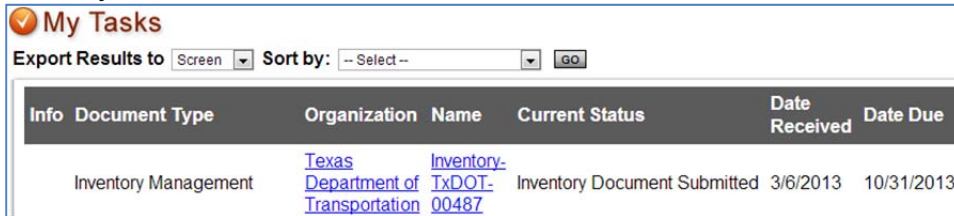
- k. Submit the **Inventory Management Document** by clicking **APPLY STATUS** under Possible Statuses; **INVENTORY DOCUMENT SUBMITTED**.

- **Note:** The document will no longer appear in your **My Tasks** and appear in Project Managers **My Tasks**.

Inventory Management and Reporting Instructions

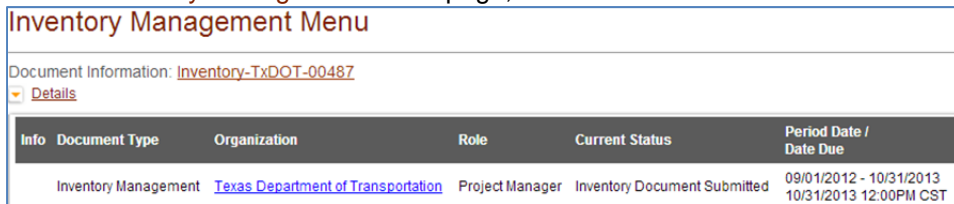
Step 2. TxDOT Project Manager: Review [Inventory Management Document](#) and notify Subgrantee Administrator

- a. Login to eGrants <https://www.txdot.gov/apps/egrants>
- b. The [Inventory Management Document](#) will appear in your  **My Tasks**; click . Current Status will be **Inventory Document Submitted**

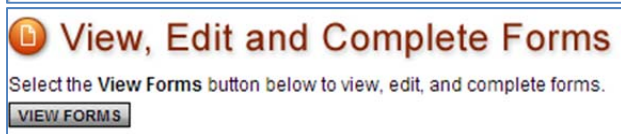


Info	Document Type	Organization Name	Current Status	Date Received	Date Due
	Inventory Management	Texas Department of Transportation	Inventory Document Submitted	3/6/2013	10/31/2013


- c. Click on the [Inventory Management Document ID](#) (Name column) in your task list.
- d. On the [Inventory Management Menu](#) page, Click  under  **View, Edit and Complete Forms** section.

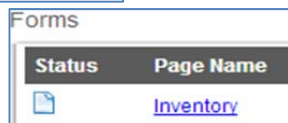



Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
Inventory Management	Texas Department of Transportation	Project Manager	Inventory Document Submitted	09/01/2012 - 10/31/2013	10/31/2013 12:00PM CST

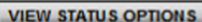



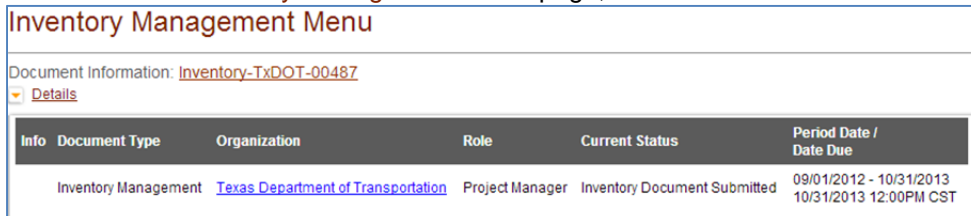
View, Edit and Complete Forms
Select the **View Forms** button below to view, edit, and complete forms.



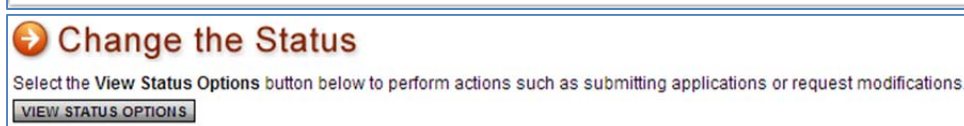


Status	Page Name
	Inventory

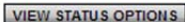
- e. Click the [Inventory](#) link on the Forms page
- f. Review the [INVENTORY](#) page. Contact the Policy and Procedures Coordinator if you have questions.
- g. Go back to the [Inventory Management Menu](#) page, Click  under  **Change the Status** section.




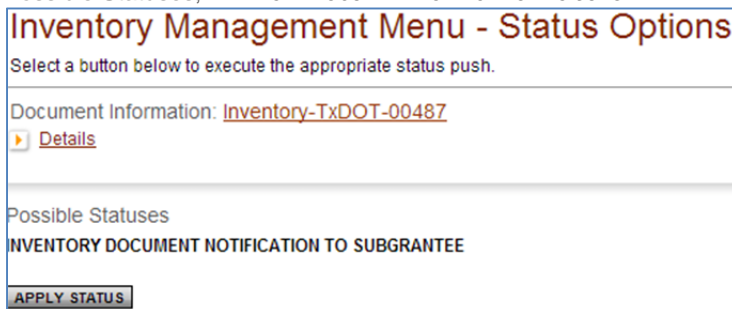
Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
Inventory Management	Texas Department of Transportation	Project Manager	Inventory Document Submitted	09/01/2012 - 10/31/2013	10/31/2013 12:00PM CST



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



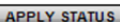
- h. Submit [Inventory Management Document](#) to Subgrantee Administrator(s) by clicking  under Possible Statuses; **INVENTORY DOCUMENT NOTIFICATION TO SUBGRANTEE**





Inventory Management Menu - Status Options
Select a button below to execute the appropriate status push.

Document Information: [Inventory-TxDOT-00487](#)
[Details](#)

Possible Statuses
INVENTORY DOCUMENT NOTIFICATION TO SUBGRANTEE



Note: When you change status of the [Inventory Management Document](#); it will longer appear in your  **My Tasks** and eGrants will automatically create the [Inventory Annual Report](#) for the Subgrantee Administrator(s) and place it in the Subgrantee Administrator(s) .

Inventory Management and Reporting Instructions

Step 3. Organization Subgrantee Administrator(s) : Review, complete & submit **Inventory Annual Report**

- a. Login to eGrants <https://www.txdot.gov/apps/egrants>
- b. The **Inventory Annual Report** will appear in your **My Tasks**; click . Current Status will be **Inventory Annual Report Created**

My Tasks

Export Results to Sort by:

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	Inventory Annual Report	Texas Department of Transportation	2013-IAR-TxDOT-0004	Inventory Annual Report Created	3/11/2013	3/31/2013

Name

[2013-IAR-TxDOT-0004](#)

- c. Click on the **Inventory Annual Report** ID (Name Column) in your task list.
- d. On the **Inventory Annual Report Menu** page, Click under **View, Edit and Complete Forms** section.

Inventory Annual Report Menu

Document Information: [2013-IAR-TxDOT-0004](#)
 Parent Information: [Inventory-TxDOT-00487](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Inventory Annual Report	Texas Department of Transportation	Subgrantee Administrator	Inventory Annual Report Created	03/01/2013 - 03/31/2013 03/31/2013 12:00PM CST

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

Forms

Status	Page Name
	Inventory Subgrantee Annual Report

- e. Click [Inventory Subgrantee Annual Report](#) link on Forms page
- f. Complete the **INVENTORY SUBGRANTEE ANNUAL REPORT** page.

- On this page you will see the details of the Inventory Item you are going to certify.

INVENTORY SUBGRANTEE ANNUAL REPORT

Name : Item Name (Ex Printer)

Description : Item Description (Ex Hewlett Packard ScanJet 85i)

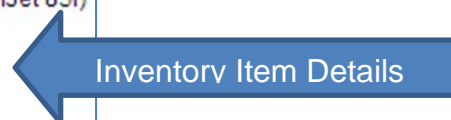
Type : Purchase

Serial # : 12345678

Acquisition Date : 1/15/13

Acquisition Cost :

Comments : Comments on Item



- Certify the Item by completing all fields under [Complete this section](#) on this page.

Sugrantee Inventory Number *

(The # your organization assigns to the Inventory Item)

Current Location *

Inventory Management and Reporting Instructions

Condition Report Good Fair Poor *

Current Status Traffic Safety activities for which originally acquired
 Other Traffic Safety activities
 No longer in service

Future Need Item will continue to be used in a Traffic Safety project
 Item will be used in a federally funded project
 Item no longer needed

The item indicated above is in the possession of this agency and was physically inspected

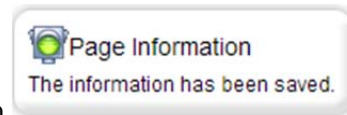
Date Inspected *

Name of Inspector *

Title *

- After you fill out all required fields: click **SAVE** in the top right corner of the page to save your work.

- All fields are required, if you don't enter a required field then you will get an error message  Page Error(s)



- If you have filled out all required fields you will receive a confirmation

- Go back to the **Inventory Annual Report Menu** page: then Click **VIEW STATUS OPTIONS** under **Change the Status** section.

Inventory Annual Report Menu

Document Information: [2013-IAR-TxDOT-00004](#)
 Parent Information: [Inventory-TxDOT-00487](#)
[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Inventory Annual Report	Texas Department of Transportation	Subgrantee Administrator	Inventory Annual Report Created	03/01/2013 - 03/31/2013 03/31/2013 12:00PM CST

Change the Status

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

VIEW STATUS OPTIONS

- Submit **Inventory Annual Report** to TxDOT Project Manager by clicking **APPLY STATUS** under Possible Statuses; **INVENTORY ANNUAL REPORT SUBMITTED**

Inventory Annual Report Menu - Status Options

Select a button below to execute the appropriate status push.

Document Information: [2013-IAR-TxDOT-00004](#)
 Parent Information: [Inventory-TxDOT-00487](#)
[Details](#)

Possible Statuses
INVENTORY ANNUAL REPORT SUBMITTED

APPLY STATUS

- Note:** The report will no longer be in your  **My Tasks**; it will be in the Project Managers  **My Tasks**.

- You can still access the document by using the Supplemental Tab **Supplementals** and Entering the Report ID and using the Search Function.

Inventory Management and Reporting Instructions

Step 4. TxDOT Project Manager: Review and Approve Inventory Annual Report

- a. Login to eGrants <https://www.txdot.gov/apps/egrants>
- b. The Inventory Annual Report will appear in **My Tasks**; click . The Current Status will be Inventory Annual Report Submitted

My Tasks

Export Results to Screen Sort by: -- Select -- GO

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	Inventory Annual Report	Texas Department of Transportation	2013-IAR-TxDOT-00004	Inventory Annual Report Submitted	3/12/2013	3/31/2013

CLOSE TASKS

Name

[2013-IAR-TxDOT-00004](#)

- c. Click on the Inventory Annual Report ID (Name Column) in your task list.
- d. On the Inventory Annual Report Menu page, Click under **View, Edit and Complete Forms** section.

Inventory Annual Report Menu

Document Information: [2013-IAR-TxDOT-00004](#)
 Parent Information: [Inventory-TxDOT-00487](#)

Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Inventory Annual Report	Texas Department of Transportation	Project Manager	Inventory Annual Report Submitted	03/01/2013 - 03/31/2013 03/31/2013 12:00PM CST

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS

Forms

Status	Page Name
	Inventory Subgrantee Annual Report

- e. Click the [Inventory Subgrantee Annual Report](#) link on Forms page
- f. Review the **INVENTORY SUBGRANTEE ANNUAL REPORT** page submitted by the Subgrantee Administrator.
- g. Go back to the Inventory Annual Report Menu page, Click under **Change the Status** section.

Inventory Annual Report Menu

Document Information: [2013-IAR-TxDOT-00004](#)
 Parent Information: [Inventory-TxDOT-00487](#)

Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Inventory Annual Report	Texas Department of Transportation	Project Manager	Inventory Annual Report Submitted	03/01/2013 - 03/31/2013 03/31/2013 12:00PM CST

Change the Status

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

VIEW STATUS OPTIONS

Inventory Management and Reporting Instructions

- h. Submit **Inventory Management Document** to Subgrantee Administrator by clicking **APPLY STATUS** under Possible Statuses

Inventory Annual Report Menu - Status Options

Select a button below to execute the appropriate status push.

Document Information: [2013-IAR-TxDOT-00004](#)
Parent Information: [Inventory-TxDOT-00487](#)
[▶ Details](#)

Possible Statuses

INVENTORY ANNUAL REPORT APPROVED

APPLY STATUS

INVENTORY ANNUAL REPORT MODIFICATIONS

APPLY STATUS

INVENTORY ANNUAL REPORT SENT TO POLICY COORDINATOR

APPLY STATUS

- If it passed your review & you want to Approve: **APPLY STATUS** to INVENTORY ANNUAL REPORT APPROVED. eGrants will send an email to Policy and Procedures Coordinator
- If you need to send back to Subgrantee Administrator for modifications: **APPLY STATUS** to INVENTORY ANNUAL REPORT MODIFICATIONS.
- If you need to send to the Policy & Procedures Coordinator for review: **APPLY STATUS** to INVENTORY ANNUAL REPORT SENT TO POLICY COORDINATOR.