Grants and Projects: Tables

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Tables

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Grants and Projects Table

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Grant/Project Profile - GRT2110

Grants and Projects > Tables > Grant/Project Profile

This page is used to define grant codes that can be tracked in the Grants and Projects application. Each grant code is assigned fund/fiscal years and file ID information allowing information to be combined across file IDs for a complete inquiry or report.

Modify a record:

Field	Description
Grant/Project Code	Type a grant/project code, or click ⋮ to select a code from the Grant and Project Codes lookup.
Description	The grant/project code description is displayed.

❑ Click **Retrieve**. The grant record is displayed.

❑ Click **Add** to clear the fields on the page and add a new record.

Grant/Project Code	Type a grant/project code. This code is user-defined and can be a maximum of ten alphanumeric characters. This field is required.
Description	Type a description for the code. It is recommended to add a date or year in order to easily identify the grant (e.g., Title 1A 2022). This field is required.

❑ Update the following fields:

Status	Click ⌄ to select the code status (*A - Active* or *I - Inactive*).
NOGA/Project Nbr	Type the Notice of Grant Award (NOGA) or project number. This field is optional.
CFDA Nbr	Type the Catalog of Federal Domestic Assistance (CFDA) number that was assigned to the grant when awarded by the Federal government. This field is optional.
Begin Date	Type the beginning date of the grant or select a date from the calendar. This field is optional.
End Date	Type the ending date of the grant or select a date from the calendar. This field is optional.

Note: Grants often overlap fiscal years and file IDs so you can add as many lines as needed to ensure complete data is retrieved in the application. Be sure to consider file IDs, and fund/fiscal year details.

In the grid:

❑ Click **+Add** to add rows as needed.

GL File ID	Select the one-character file ID. **Note**: Duplicate account entries are allowed for different file IDs.
Account Code	Type all or some of the desired account code, or click ⋮ in each field of the lookup to select the appropriate account code components from the Account Codes lookup. The selected account code component is populated in the corresponding **Account Code** field.
Description	The account description is displayed.

❑ Click **Save**.

Other functions and features:

Delete	Click to delete the grant/project code that is retrieved on the page. Grant codes assigned to user profiles in District Administration cannot be deleted. A message is displayed prompting you to confirm the deletion. Click **OK** to delete the record. Otherwise, click **Cancel** to return to the Grants and Projects page without deleting the record.

Grant/Project Profile

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Manage Users - GRT2160

Grants and Projects > Tables > Manage Users

This page is used to manage user accounts in Grants and Projects and MemberPortal. In order for users to have the appropriate access to a grant, user profiles must be completed by linking the user to a specific member and grant type, and assigning the level of access the user has to a grant type. Fiscal agents can use this page to add, change, and delete user accounts in both Grants and Projects and MemberPortal.

Member users can create an account via MemberPortal; however, they will not have access to any grant information until the fiscal agent or MemberPortal admin user completes their user profile.

> **TIP**: **It is recommended** that fiscal agents create at least one MemberPortal user with admin permission for each member LEA. Admin users will have access to a Manage Users page in MemberPortal where they can perform all of these same tasks for users within their member LEA.

Retrieve a record:

❑ Under **Users**, use the following fields to narrow your search results:

First Name	Type the MemberPortal user's first name.
Last Name	Type the MemberPortal user's last name.
Member	Type the member name or county district number.
Admin	Select to only include admin users.
Include Inactive	Select to include users with an inactive status.

❑ Click **Retrieve**. A list of records matching your search criteria displays in the **Results** grid.

If the user created an account in MemberPortal, the user's information is displayed in the list of results. However, you will notice that the **Member** column is blank since their user profile has not been completed. At this point, the user does not have access to view any grant information in MemberPortal.

❑ Click 🔍 to open the User detail pop-up window and enter the applicable data to complete the user's MemberPortal profile. The user's **First Name**, **Last Name**, **E-mail**, and **User Name** fields are automatically populated.

Add a record:

❑ Click **Add User** to open the User detail pop-up window and enter the applicable data to add a new user and complete the user's profile.

> When creating a new MemberPortal user or resetting a user's password, the change password date is set to 01/01/2000, which requires the user to change their password upon logging on to MemberPortal.

❑ Under **User**:

First Name	Type the user's first name. This field can be a maximum of 50 characters.
Last Name	Type the user's last name. This field can be a maximum of 50 characters.

❑ In the **Phone** fields:

Area Cd	Type the three-digit area code of the phone number.
Phone Nbr	Type the seven-digit phone number.
Ext	Type the four-digit extension number if any.

Member	Begin typing a member name or six-digit county district number. As you type the data, a drop-down list of corresponding data is displayed. Select a member. If the member name or county district number is not known, click ⋮ to select a member from the Member lookup or press the SPACEBAR to view a list of members.
Admin	Select to indicate that the user is an admin user. Users designated as Admin users will be able to manage users for their assigned member in MemberPortal.
Status	Click ⌄ to select the user's status (*A - Active* or *I - Inactive*).
E-mail	Type the user's email address. The field can be a maximum of 250 characters.
E-mail Opt-Out	Select to indicate that this user is opted out of receiving emails.
User Name	Type a 6-25 character user name. (No embedded spaces are allowed.)
Password	Type a new password. If the user initiated the account profile via MemberPortal, this field is populated with an encoded and masked version of the user's password to secure their credentials. Fiscal agents or admin users can update user passwords as needed. Requirements: • 8-46 alphanumeric characters • Three of the following: uppercase, lowercase, numeric, and special characters • Case-sensitive

❑ Under **Grant Types**:

Grant Type	Begin typing the grant type or description. As you type the data, a drop-down list of corresponding data is displayed. Select a grant. If the grant type or description is not known, click ⋮ to select a grant from the Grant Types lookup or press the SPACEBAR to view a list of grant types.

Accessibility	Click ⌄ to select the user's level of access to the corresponding grant type.
	• All
	• Inquire Only
	• Enter and Save Data
	• Submit Reimbursement Request
	• Submit Budget Revision Request
	Note: If a user only has access to enter and save requests, they can only update their requests.

❑ Click **+Add** to add additional rows.

❑ Click **Save**. Otherwise, click **Cancel** to return to the Manage Users page without adding data.

Other functions and features:

🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.

SSA Alternate Approvers - GRT2140

Grants and Projects > Tables > SSA Alternate Approvers

This page is used to assign an alternate approver to an approver who is unable to perform their assigned approval duties during a specified timeframe for grant requests.

View a record:

Field	Description
Grant Type	Begin typing a grant type or description. As you type the data, a drop-down list of corresponding data is displayed. Select a grant type. If the grant type or description is not known, click ⋮ to select a grant type from the Grant Types lookup or press the SPACEBAR to view a list of grant types.

❏ Click **Retrieve**. If an approval workflow exists for the selected grant type, the list of approvers is displayed.

Field	Description
Approver Emp Nbr	The employee number of the approver is displayed.
Approver Name	The name of the approver is displayed.
Use Alternate	Select to use the alternate approver instead of the approver. If selected, and no date range is entered in the **From Date** and **To Date** fields, the alternate approver becomes the approver. If selected, and no date range is entered in the **From Date** and **To Date** fields, all pending requests are updated with the alternate approver for the selected original approver. If selected, and a date range is entered in the **From Date** and **To Date** fields, all pending requests are updated with the alternate approver for the selected original approver if today's date falls on or between the from and to dates. If selected, and a date range is entered in the **From Date** and **To Date** fields, and today's date is outside the range of the from and to dates, no updates occur for the selected original approver. If not selected, and/or a date range is entered in the **From Date** and **To Date** fields, no updates occur for the selected original approver. If selected, and then cleared, the alternate approver for all pending requests reverts to the original approver and an email message is sent to the original approver. This includes updating the workflow datetimestamp to today's date to reset the reminder days for the original approver.
Alternate Emp Nbr	Type an employee number or click ⋮ to select one from the Approver Directory.

Field	Description
Alternate Approver Name	The selected alternate approver name displays based on the **Alternate Emp Nbr** field.
From Date	Type the beginning date from which the alternate approver will serve as the approver. Use the MM-DD-YYYY format. Or, select a date from the calendar.
To Date	Type the ending date on which the alternate approver will end serving as the approver. Use the MM-DD-YYYY format. Or, select a date from the calendar.

❑ Click **Save**.

Other functions and features:

Clear Row	Click to delete an alternate approver and click **Save**.

SSA Alternate Approvers

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SSA Approval Path - GRT2130

Grants and Projects > Tables > SSA Approval Path

This page is used to create and maintain the sequence or hierarchy of approvers for grant requests. The order in which the approvers are listed indicates the approval sequence. You can add to or edit the approval path as needed. If a change is made to the approval path, the change will apply to all grant requests that have yet to reach that specific approver.

Notes: Any changes made to the approval path are immediate and automatically update (move) existing requests.

View a record:

Field	Description
Grant Type	Begin typing a grant type or description. As you type the data, a drop-down list of corresponding data is displayed. Select a grant type. If the grant type or description is not known, click ⋮ to select a grant type from the Grant Types lookup or press the Spacebar to view a list of grant types.

❑ Click **Retrieve**. If an approval workflow exists, the list of approvers is displayed and you can make changes as needed.

The drag-and-drop feature is available allowing you to change the order of the approval path.

Reminder Days	Type the number of days after which no action has been taken on an item and a reminder email should be forwarded to the originator and approver. This field has a maximum of three digits. By default, this field is set to zero indicating that no reminders will be sent. If the value is greater than zero, the Approver has that many days to respond to the approval before a reminder email is sent to the Approver. After the initial reminder email message is sent, email messages are sent on a daily basis until action is taken.

❑ Click **+Add** to add an approver. The Approver Directory is displayed. Or, click ⋮ to open the directory and select an approver.

Approver	The selected approver name is displayed.
Email Opt-Out	Select to indicate that this approver is opted out of receiving approval workflow emails.

❑ Click **Save**. Depending on the change, the appropriate application message is displayed indicating the action.

Other functions and features:

🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.

SSA Approval Path

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SSA Grants

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Grant Types - GRT2120

Grants and Projects > Tables > SSA Grants > Grant Types

This tab allows fiscal agents to maintain a list of grant types and descriptions, which can be used to facilitate the appropriate workflows and member notifications for each grant type. Grant types cannot be changed once they are in use; however, grant descriptions can be changed at any time.

Additionally, fiscal agents can use the grant amounts feature to maintain annual budget amounts for multi-year grant types.

Modify a record:

Field	Description
Start At	Type the starting grant type from which you want to retrieve.

❑ Click **Retrieve**. A list of grant types equal to and greater than the entered starting grant type is displayed.

Add a record:

❑ Click **+Add** to add a row.

Grant Type	Type a unique user-defined grant type. This field can be a maximum of ten alphanumeric characters.
Description	Type a user-defined grant type description. This field can be a maximum of 40 alphanumeric characters.

Grant Amount	Click 🔍 to display the Grant Amounts pop-up window. The Grant Amounts pop-up window allows you to maintain annual budget amounts for each year associated with the selected multi-year grant type. The selected Grant Type is displayed at the top of the pop-up window. You can add new years and budget amounts, or edit existing amounts as needed. **Note**: Future functionality will use this information to prevent the disbursement of reimbursements over the allotted annual budget amount. However, at this time, it is for informational purposes only. ❏ Click **+Add** to add a new row.

Year	Type a four-digit grant year.
Amount	Type the annual budget amount for the selected grant type. This amount cannot be greater than 999,999,999.99.

❏ Click **OK** to accept the changes and close the pop-up window. Otherwise, click X or **Cancel** to return to the Grant Types tab without making changes to the grant amounts.

🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **OK** to close the pop-up window and return to the Grant Types tab. Click **Save** to delete the rows marked for deletion.

Status	Click ⌄ to select the grant type status (*A - Active* or *I - Inactive*).

❏ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
+Add	Click to add a row to the table. Or, from the last row of the table, type a value in the **Grant Type** field and press Tab. A new row is added to the table.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Payment Dates - GRT2120

Grants and Projects > Tables > SSA Grants > Payment Dates

This tab allows fiscal agents to maintain a list of cut-off dates and expected payment dates for each grant type. These dates are for informational purposes only. The payment cut-off date is displayed for the grant type in MemberPortal to remind member LEAs of the fiscal agent's cut-off date. This tab is optional.

Retrieve a record:

Field	Description
Grant Type	Begin typing a grant type or description. As you type the data, a drop-down list of corresponding data is displayed. Select a grant type. If the grant type or description is not known, click ⋮ to select a grant type from the Grant Types lookup or press the SPACEBAR to view a list of grant types.

❑ Click **Retrieve**. The payment dates for the grant type are displayed if any.

Add a payment date:

❑ Click **+Add** to add a row.

Cut Off Date	Type the grant cut-off date in the MM-DD-YYYY format. Or, select a date from the calendar.
Payment Date	Type the grant payment date in the MM-DD-YYYY format. Or, select a date from the calendar.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

SSA Members

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Bank Code - GRT2150

Grants and Projects > Tables > SSA Members > Bank Code

This tab is used to add and maintain member bank information for EFT payments processed in the Grants and Projects application. If the member uses the same account information for vendor EFT payments, this tab does not need to be populated.

The bank information hierarchy is as follows: This tab is the primary source of bank information for grant payments. If this tab is blank, the bank information from the Finance > Maintenance > Vendor Information > Vendor Miscellaneous tab is used. If the Vendor Miscellaneous tab is blank, a check is issued.

View a record:

Field	Description
Member	Begin typing the member name or six-digit county-district number. As you type the data, a drop-down list of corresponding data is displayed. Or, press the Spacebar to view a list of members. Select a member and click **Retrieve**. The member record is displayed. If the member name or county-district number is not known, click Directory to perform a search of all active members.

Add a bank record:

❑ Under **Bank Information**:

EFT E-mail	Type the member's email address to send EFT payment information. The field can be a maximum of 100 characters. This field is required when adding a bank information record.

Bank	Begin typing a bank code or name. As you type the data, a drop-down list of corresponding data is displayed. The bank information must exist on the Finance > Tables > Bank Codes tab. Select a bank code. If the bank code or name is not known, click ⋮ to select a bank from the Banks lookup or press the SPACEBAR to view a list of banks.
Bank Acct Nbr	Type the corresponding bank account number for the selected bank.
Bank Acct Type	Select the account type for the selected bank and bank account number. • *2 Checking account* • *3 Savings account*
PreNote	Select to generate a prenote to the bank.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.
Add	Click to add a new member record.

Member Information - GRT2150

Grants and Projects > Tables > SSA Members > Member Information

This tab allows fiscal agents to add and maintain member data. Fiscal agents can use the Security Administration application to limit the users who can view this information.

Member Information records cannot be deleted; however, they can be set to inactive.

View a record:

Field	Description
Member	Begin typing the member name or six-digit county-district number. As you type the data, a drop-down list of corresponding data is displayed. Or press the Spacebar to view a list of members. Select a member and click **Retrieve**. The member record is displayed. If the member name or county-district number is not known, click Directory to perform a search of all active/inactive members.

Add a record:

❏ Click **Add** to add a new member record.

❏ Under **Member Information**:

County District Nbr	Type a six-digit county-district number. This field is required.
Member Name	Type the member name. This field can be a maximum of 35 alphanumeric characters. Special characters are limited to the following: apostrophe, colon, comma, and dash. This field is required.
Region	Click ⌄ to select the two-digit Education Service Center (ESC) region number. This field is required.
Vendor	Type a valid vendor name or number. If the vendor number is not known, click ⋮ to select a vendor from the Vendors directory. The Vendors directory is populated from the vendor records established on the Finance > Maintenance > Vendor Information > Vendor Name/Address tab. This field is required.
Status	Click ⌄ to select the member's status (i.e., *Active* or *Inactive*). This field is required.

❏ Under **Main Contact**:

Title	Click ⌄ to select a legal title for the contact person.
First	Type the contact's first name. This field can be a maximum of 50 characters.
Last	Type the contact's last name. This field can be a maximum of 50 characters.
E-mail	Type the contact's e-mail address. This field can be a maximum of 100 characters.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.