



## Grants and Projects: Tables



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# 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
<b>Grant/Project Code</b>	Type a grant/project code, or click  to select a code from the <a href="#">Grant and Project Codes lookup</a> .
<b>Description</b>	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.

<b>Grant/Project Code</b>	Type a grant/project code. This code is user-defined and can be a maximum of ten alphanumeric characters. This field is required.
<b>Description</b>	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:


<b>Status</b>	Click  to select the code status ( <i>A - Active</i> or <i>I - Inactive</i> ).
<b>NOGA/Project Nbr</b>	Type the Notice of Grant Award (NOGA) or project number. This field is optional.
<b>CFDA Nbr</b>	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.
<b>Begin Date</b>	Type the beginning date of the grant or select a date from the calendar. This field is optional.
<b>End Date</b>	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.



<b>GL File ID</b>	Select the one-character file ID.  <b>Note:</b> Duplicate account entries are allowed for different file IDs.
<b>Account Code</b>	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 <b>Account Code</b> field.
<b>Description</b>	The account description is displayed.

☐ Click **Save**.

### Other functions and features:

<b>Delete</b>	<p>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.</p> <p>A message is displayed prompting you to confirm the deletion.</p> <p>Click <b>OK</b> to delete the record. Otherwise, click <b>Cancel</b> to return to the Grants and Projects page without deleting the record.</p>
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# 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:

<b>First Name</b>	Type the MemberPortal user's first name.
<b>Last Name</b>	Type the MemberPortal user's last name.
<b>Member</b>	Type the member name or county district number.
<b>Admin</b>	Select to only include admin users.
<b>Include Inactive</b>	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**:

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


☐ In the **Phone** fields:

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

<b>Member</b>	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 <a href="#">Member lookup</a> or press the SPACEBAR to view a list of members.
<b>Admin</b>	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.
<b>Status</b>	Click  to select the user's status ( <i>A - Active</i> or <i>I - Inactive</i> ).
<b>E-mail</b>	Type the user's email address. The field can be a maximum of 250 characters.
<b>E-mail Opt-Out</b>	Select to indicate that this user is opted out of receiving emails.
<b>User Name</b>	Type a 6-25 character user name. (No embedded spaces are allowed.)
<b>Password</b>	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: <ul style="list-style-type: none"> <li>• 8-46 alphanumeric characters</li> <li>• Three of the following: uppercase, lowercase, numeric, and special characters</li> <li>• Case-sensitive</li> </ul>

☐ Under **Grant Types**:


<b>Grant Type</b>	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.
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<b>Accessibility</b>	<p>Click  to select the user's level of access to the corresponding grant type.</p> <ul style="list-style-type: none"><li>• All</li><li>• Inquire Only</li><li>• Enter and Save Data</li><li>• Submit Reimbursement Request</li><li>• Submit Budget Revision Request</li></ul> <p><b>Note:</b> If a user only has access to enter and save requests, they can only update their requests.</p>
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☐ 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.
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# 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
<b>Grant Type</b>	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 <a href="#">Grant Types lookup</a> 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
<b>Approver Emp Nbr</b>	The employee number of the approver is displayed.
<b>Approver Name</b>	The name of the approver is displayed.
<b>Use Alternate</b>	<p>Select to use the alternate approver instead of the approver.</p> <p>If selected, and no date range is entered in the <b>From Date</b> and <b>To Date</b> fields, the alternate approver becomes the approver.</p> <p>If selected, and no date range is entered in the <b>From Date</b> and <b>To Date</b> fields, all pending requests are updated with the alternate approver for the selected original approver.</p> <p>If selected, and a date range is entered in the <b>From Date</b> and <b>To Date</b> 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.</p> <p>If selected, and a date range is entered in the <b>From Date</b> and <b>To Date</b> fields, and today's date is outside the range of the from and to dates, no updates occur for the selected original approver.</p> <p>If not selected, and/or a date range is entered in the <b>From Date</b> and <b>To Date</b> fields, no updates occur for the selected original approver.</p> <p>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.</p>
<b>Alternate Emp Nbr</b>	Type an employee number or click  to select one from the <a href="#">Approver Directory</a> .

Field	Description
<b>Alternate Approver Name</b>	The selected alternate approver name displays based on the <b>Alternate Emp Nbr</b> field.
<b>From Date</b>	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.
<b>To Date</b>	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:

<b>Clear Row</b>	Click to delete an alternate approver and click <b>Save</b> .
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# 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
<b>Grant Type</b>	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 <a href="#">Grant Types lookup</a> 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.


<b>Reminder Days</b>	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.
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☐ Click **+Add** to add an approver. The [Approver Directory](#) is displayed. Or, click  to open the directory and select an approver.

<b>Approver</b>	The selected approver name is displayed.
<b>Email Opt-Out</b>	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.
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# 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.

<b>Grant Amount</b>	<p>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.</p> <p>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.</p> <p><b>Note:</b> 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.</p> <p><input type="checkbox"/> Click <b>+Add</b> to add a new row.</p> <table border="1" data-bbox="339 488 1477 607"> <tr> <td data-bbox="339 488 459 533"><b>Year</b></td><td data-bbox="467 488 1477 533">Type a four-digit grant year.</td></tr> <tr> <td data-bbox="339 533 459 607"><b>Amount</b></td><td data-bbox="467 533 1477 607">Type the annual budget amount for the selected grant type. This amount cannot be greater than 999,999,999.99.</td></tr> </table> <p><input type="checkbox"/> Click <b>OK</b> to accept the changes and close the pop-up window. Otherwise, click X or <b>Cancel</b> to return to the Grant Types tab without making changes to the grant amounts.</p> <table border="1" data-bbox="339 725 1477 943"> <tr> <td data-bbox="339 725 379 792"></td><td data-bbox="387 725 1477 792">Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.</td></tr> <tr> <td data-bbox="339 792 379 860"></td><td data-bbox="387 792 1477 860">Click <b>OK</b> to close the pop-up window and return to the Grant Types tab.</td></tr> <tr> <td data-bbox="339 860 379 943"></td><td data-bbox="387 860 1477 943">Click <b>Save</b> to delete the rows marked for deletion.</td></tr> </table>	<b>Year</b>	Type a four-digit grant year.	<b>Amount</b>	Type the annual budget amount for the selected grant type. This amount cannot be greater than 999,999,999.99.		Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.		Click <b>OK</b> to close the pop-up window and return to the Grant Types tab.		Click <b>Save</b> to delete the rows marked for deletion.
<b>Year</b>	Type a four-digit grant year.										
<b>Amount</b>	Type the annual budget amount for the selected grant type. This amount cannot be greater than 999,999,999.99.										
	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.										
	Click <b>OK</b> to close the pop-up window and return to the Grant Types tab.										
	Click <b>Save</b> to delete the rows marked for deletion.										
<b>Status</b>	Click  to select the grant type status ( <i>A - Active</i> or <i>I - Inactive</i> ).										

☐ Click **Save**.

### Other functions and features:


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

# 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
<b>Grant Type</b>	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 <a href="#">Grant Types lookup</a> 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.

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

☐ Click **Save**.

### Other functions and features:

<b>Retrieve</b>	The <b>Retrieve</b> button is also used to retrieve information from the last save. If you click <b>Retrieve</b> , 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 <b>Save</b> .

# 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
<b>Member</b>	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 <b>Retrieve</b> . The member record is displayed.  If the member name or county-district number is not known, click <a href="#">Directory</a> to perform a search of all active members.

### Add a bank record:

☐ Under **Bank Information**:


<b>EFT E-mail</b>	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.
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<b>Bank</b>	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 <a href="#">Finance &gt; Tables &gt; Bank Codes</a> tab. Select a bank code. If the bank code or name is not known, click  to select a bank from the <a href="#">Banks lookup</a> or press the SPACEBAR to view a list of banks.
<b>Bank Acct Nbr</b>	Type the corresponding bank account number for the selected bank.
<b>Bank Acct Type</b>	Select the account type for the selected bank and bank account number. <ul style="list-style-type: none"> <li>• 2 <i>Checking account</i></li> <li>• 3 <i>Savings account</i></li> </ul>
<b>PreNote</b>	Select to generate a <a href="#">prenote</a> to the bank.

☐ Click **Save**.

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**Other functions and features:**

<b>Retrieve</b>	The <b>Retrieve</b> button is also used to retrieve information from the last save. If you click <b>Retrieve</b> , 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.
<b>Add</b>	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
<b>Member</b>	<p>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 <b>Retrieve</b>. The member record is displayed.</p> <p>If the member name or county-district number is not known, click <a href="#">Directory</a> to perform a search of all active/inactive members.</p>

### Add a record:

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

☐ Under **Member Information**:

<b>County District Nbr</b>	Type a six-digit county-district number. This field is required.
<b>Member Name</b>	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.
<b>Region</b>	Click ▼ to select the two-digit Education Service Center (ESC) region number. This field is required.
<b>Vendor</b>	<p>Type a valid vendor name or number. If the vendor number is not known, click ⓘ to select a vendor from the <a href="#">Vendors directory</a>.</p> <p>The Vendors directory is populated from the vendor records established on the <a href="#">Finance &gt; Maintenance &gt; Vendor Information &gt; Vendor Name/Address</a> tab. This field is required.</p>
<b>Status</b>	Click ▼ to select the member's status (i.e., <i>Active</i> or <i>Inactive</i> ). This field is required.

☐ Under **Main Contact**:

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

☐ Click **Save**.

### Other functions and features:

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