



ASCENDER

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ASCENDER Release 5.0.0400

New: SSA Fiscal Agent Management

Grants and Projects > Tables > SSA Grants > Grant Types

❑ Added this tab to allow 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.

The screenshot shows the 'Grant Types' tab selected under the 'SSA Grants' section. The interface includes a 'Save' button at the top left. Below the tab headers, there is a 'Start At:' input field and a 'Retrieve' button. A table with columns 'Delete', 'Grant Type', 'Description', 'Grant Amount', and 'Status' is displayed. The 'Status' column has a dropdown menu currently set to 'Active'. At the bottom, there are pagination controls including 'First', 'Last', and a '/ 0' indicator, along with an 'Add' button.


Grants and Projects > Tables > SSA Grants > Payment Dates


❑ Added this tab to allow fiscal agents to maintain a list of cut-off dates and expected payment dates for each grant type per member.

The screenshot shows the 'Payment Dates' tab selected under the 'SSA Grants' section. The interface includes 'Save' and 'Print' buttons at the top left. Below the tab headers, there is a 'Grant Type:' dropdown menu and a 'Retrieve' button. A table with columns 'Delete', 'Cut Off Date', and 'Payment Date' is displayed. The table currently shows 'No Rows'. At the bottom, there is an empty white box.

Grants and Projects > Tables > SSA Members > Member Information

☐ Added this tab to allow fiscal agents to maintain member data records.

 Tables > SSA Members

Grants And Projects 

Save

Member: Retrieve Directory Add

MEMBER INFORMATION

BANK CODE

Member Information:

County District Nbr:

Member Name:

Region:

Vendor:

Status:

Main Contact:

Contact Name:

E-mail:

Title First Last

Grants and Projects > Maintenance > Member Grants > Grant Maintenance

☐ Added this tab to allow fiscal agents to view and maintain various details related to a specified grant year, ID, type, or member (county district) record.

Home Maintenance > Member Grants
 Grants And

Year: Grant ID:

GRANT MAINTENANCE

OBJECT MAINTENANCE

Year: Grant ID:

Member: Status:

Grant Type:

	Fund	Func	Obj	Sobj	Org	-----Prog-----		
Expense Account:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Dates

Begin Date:

End Date:

Reserve

Reserved Percent:

Reserved Amount:

Final Report

Due Date:

Processed Indicator: ☐

Summary

Total Award:	0.00	Reimbursements:	0.00	Pending Reimbursements:	0.00
Eligible Remaining:	0.00	Matching Funds:	0.00		

Transactions

Detail	Doc	Date	Type	Status	Budget Amount	Reimbursement Amount	Payment Date
No Rows							

Grants and Projects > Maintenance > Member Grants > Object Maintenance

☐ Added this tab to allow fiscal agents to add budget details allocated by object class for a specified year and grant ID.

Maintenance > Member Grants
Grants A

Save
Add

Year:
Grant ID:
Retrieve
Directory
Documents

GRANT MAINTENANCE
OBJECT MAINTENANCE

Year:
Grant ID:
Member:

Object	Total Award	Reimbursements	Pending Reimbursements	Eligible Remaining	Matching Funds	Over Expend %
61XX	0.00	0.00	0.00	0.00	0.00	0%
62XX	0.00	0.00	0.00	0.00	0.00	0%
63XX	0.00	0.00	0.00	0.00	0.00	0%
64XX	0.00	0.00	0.00	0.00	0.00	0%
65XX	0.00	0.00	0.00	0.00	0.00	0%
66XX	0.00	0.00	0.00	0.00	0.00	0%
Total:	0.00	0.00	0.00	0.00	0.00	

New: Travel Reimbursement

District Administration > Maintenance > User Profiles > Accounts

☐ Added the **TRAVEL** check box to the list of processes. If **Travel** is selected, the **Travel Request** application is displayed under APPS on the User Accounts Validation Report next to the associated account code(s).

Maintenance > User Profiles
District Administration

Save

ALCARAZ, AIDE XTRA PAY/OT (002808)
Retrieve User
Lookup User
Add User
Delete User
Remove Process

ACCOUNTS
PERMISSIONS
PURCHASING PERMISSIONS
PURCHASING ADDRESSES
PURCHASING REQUESTORS
PURCHASING RESTRICT CAMPUS/DEPT

Validation Report

Current User: ALCARAZ, AIDE XTRA PAY/OT

Delete	Fund	Func	Obj	Sobj	Org	Fscd Yr	Pgm	Ed Span	Proj Dtl	AR	BAR	BUD	FIN	PUR	TRAVEL	WHSE	RESTOCK
	XXX	XX	XXXX	XX	XXX	X	XX	X	XX	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

First
1 / 1
Last

Chart of Accounts
Dup From Existing

☐ Removed the **Account Description** column.

☐ Removed the **Refresh Description** link as it is no longer applicable.

District Administration > Maintenance > User Profiles > Permissions

☐ Added the **Travel Global Approver** check box to the Finance section allowing users to view all travel reimbursement records.

The screenshot displays the 'Permissions' configuration page for a user. At the top, a green header bar contains a home icon, the breadcrumb 'Maintenance > User Profiles', and a dropdown menu labeled 'District Admin'. Below the header, there is a 'Save' button and a search bar containing 'ALCARAZ, AIDE XTRA PAY/OT (002808)'. To the right of the search bar are buttons for 'Retrieve User', 'Lookup User', 'Add User', and 'Delete User'. The main content area has several tabs: 'ACCOUNTS', 'PERMISSIONS' (which is underlined), 'PURCHASING PERMISSIONS', 'PURCHASING ADDRESSES', 'PURCHASING REQUESTORS', and 'PURCHASING REQUESTORS'. A 'Print' button is located above the first section. The sections are as follows:

- Accounts Receivable**: Global Access ☐
- Budget Amendment Requests**:
 - Allow Account Creation ☐
 - Allow Multiple Functions on Expenditure Accounts ☐
 - Global Access ☐
- Finance**:
 - Allow JV Account Creation ☐
 - Post to Locked Accounting Period ☐
 - Travel Global Approver** ☐ (highlighted with a black circle)
- Restock / Warehouse Requisition**: Global Access ☐

District Administration > Reports > User Profile Report

☐ Modified the report to include the new **Finance Travel Global Approver** check box.

Date Run:		User Profile		Program: DA00001	
Cnty Dist:		ISD		Page 1 of 1	

AIDE XTRA PAY/OT ALCARAZ

Global Access	Over-Ride	Over-Expend/Pct	Req Max	YTD Amt	YTD Max	Bundle Requisitions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0 %	0.00	0.00	0.00	<input type="checkbox"/>

No Requestors Data Found No Purchasing Restrict Camp/Dept Found

No Receiving Addresses Data Found

No Purchasing Credit Cards Data Found

Accts Recv
Global Access

☐

BAR Allow Account Creation	BAR Allow Multiple Functions on Expenditure Accounts	BAR Global Access
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Finance Allow JV Account Creation	Finance Post to locked Accounting	Finance Travel Global Approver
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Restock/Warehouse Requisition
Global Access

☐

User Profile Accounts

BUD - XXX-XX-XXXX-XX-XX-XXXXXX

FIN - XXX-XX-XXXX-XX-XX-XXXXXX

PUR - XXX-XX-XXXX-XX-XX-XXXXXX

End of Report

Payroll > Tables > District EP Options

☐ Added the **Travel Reimbursement Request** check box under **Enable** and **Messages**. This option allows users to access the Travel Reimbursement Request feature in EmployeePortal.



EmployeePortal

Update (ASCENDER 5.0.0500)



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