



ASCENDER

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 'Delete' column has a trash icon. The 'Grant Type' column has a dropdown menu. The 'Description' column has a text input field. The 'Grant Amount' column has a search icon. The 'Status' column has a dropdown menu with 'Active' selected. At the bottom, there are navigation buttons: 'First', 'Previous', '1 / 0', 'Next', and 'Last'. An 'Add' button with a plus icon is at the bottom right.

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 a 'Save' button and a 'Print' button at the top left. Below the tab headers, there is a 'Grant Type:' input field with a dropdown menu and a 'Retrieve' button. A table with columns 'Delete', 'Cut Off Date', and 'Payment Date' is displayed. The 'Delete' column has a trash icon. The 'Cut Off Date' column has a dropdown menu. The 'Payment Date' column has a text input field. Below the table, it says 'No Rows'. An 'Add' button with a plus icon is at the bottom right.

Grants and Projects > Tables > SSA Approval Path

□ Added this page to create and maintain the sequence or hierarchy of approvers for member grant budget revision requests and reimbursement requests.

The screenshot shows the 'SSA Approval Path' configuration page. At the top, there's a green header with a home icon, 'Tables > SSA Approval Path', and a dropdown menu set to 'Grants And Projects'. Below the header is a 'Save' button. The main area has a 'Grant Type' input field and a 'Retrieve' button. Below that is a 'Reminder Days' input field set to '0'. A note states: '**Note - If Reminder Days value is greater than zero, Approver has that many days in order to respond to Approval before reminder email is sent to Approver. Subsequent emails will be sent daily after initial email. **'. A red warning box says: 'WARNING Changing the approval path will update all pending requests for the selected Workflow Grant Type when the Save button is clicked. Please inform all users to halt all workflow processing prior to save.' Below the note is a table with columns 'Grant Type:', 'Approver', and 'Email Opt-Out'. The table is currently empty, showing 'No Rows'. A drag-and-drop instruction says: '** DRAG-AND-DROP ** Press and hold down the left mouse button on the desired row to "Grab" it. "Drag" the row to the desired location. "Drop" the row by releasing the mouse button.'

Grants and Projects > Tables > SSA Members > Member Information

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

The screenshot shows the 'SSA Members' page. At the top, there's a green header with a home icon, 'Tables > SSA Members', and a dropdown menu set to 'Grants And Projects'. Below the header is a 'Save' button. The main area has a 'Member:' input field and three buttons: 'Retrieve', 'Directory', and 'Add'. Below these is a tabbed interface with 'MEMBER INFORMATION' and 'BANK CODE'. The 'MEMBER INFORMATION' tab is active. It contains two sections: 'Member Information' and 'Main Contact'. The 'Member Information' section has fields for 'County District Nbr:', 'Region:', 'Status:' (set to 'Active'), 'Member Name:', and 'Vendor:'. The 'Main Contact' section has fields for 'Contact Name:' (with 'Title', 'First', and 'Last' sub-fields), and 'E-mail:'.

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.

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:

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	☐	☐	☒	☒	☒	☐	☐	☐

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 shows the 'Permissions' page for a user profile. The breadcrumb trail is 'Maintenance > User Profiles > District Administration'. The user profile is 'ALCARAZ, AIDE XTRA PAY/OT (002808)'. The 'PERMISSIONS' tab is selected. The 'Finance' section is highlighted, and the 'Travel Global Approver' checkbox is circled.

Section	Permission	Checkbox
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	☐
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
☐	☐	☐ 0 %	0.00	0.00	0.00	☐

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
☐	☐	☐

Finance Allow JV Account Creation	Finance Post to locked Accounting	Finance Travel Global Approver
☐	☐	☐

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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