GrantSolutions 3.0 Release Notes

Important Account Changes

- Storage of Account information has been moved to a more secure storage mechanism. Your existing password has been retained. For persons with multiple roles, your account may have been consolidated. If that is the case, then your earliest account user name and password have been retained and is associated with all of your existing roles.
- Inactive Accounts have been purged from the system.
- If you are having problems accessing your account please try:
    1. the Forgot Password screen and/or
    2. calling the Help Desk.
- Forgot Password requires your user name and its associated email address.
    - Your newly generated password will be emailed to you.
    - On login you will be prompted to change your password.

General Changes

1. Field level Context Sensitive help is available for fields identified by an adjacent "question mark." To view:
    - Click the icon and help text displays below the field.
    - Click the icon again to hide the help text.
    - More field level help will become available with each deployment.
2. The Staff Assignments sub-menu option has been removed from the "System Management" main menu option. For more information, see the section below on Announcement Assignments.
3. On the Award Workflow confirmation page, users may now comment on each award status change and receive confirmation of the action.
4. A new Continuation Page category has been created. "Project Scope" information can be transferred from the funding memo to the draft continuation pages. This new section can be edited by Grants Staff.

Grant and Application Notes for Grantees

1. Grantees may now comment their own Application or Grant notes with each workflow action.

Options to allow Candidates to Accept/Reject a Grant Award

1. Grantees may enter comments for workflow actions (e.g., accept, reject, decline, return). The system then enters these comments as internal Application Notes.
    - Grantees will be presented with a Workflow Action Confirmation Screen, which displays a comment box for user input.

    - Optional for some actions except return and reject where users should enter a reason.
    - GrantSolutions captures and displays the date.
2. Grantees may view these comments from the Workflow History page and My Grants List.
    - Select the adjacent **View** link to access comments from Application Notes.

Notifications / Messages

- Users will no longer see the "Message Center" within GrantSolutions.
- Event notifications go directly to email.
- Email sent from the system will be decorated with the GrantSolutions header and footer.
- Messages will include origin information. This will allow messages from non-production environments to be differentiated.
- Users will notice the familiar Message Create Screen when ***sending messages*** from My Grants List (MGL) and Manage Amendments.

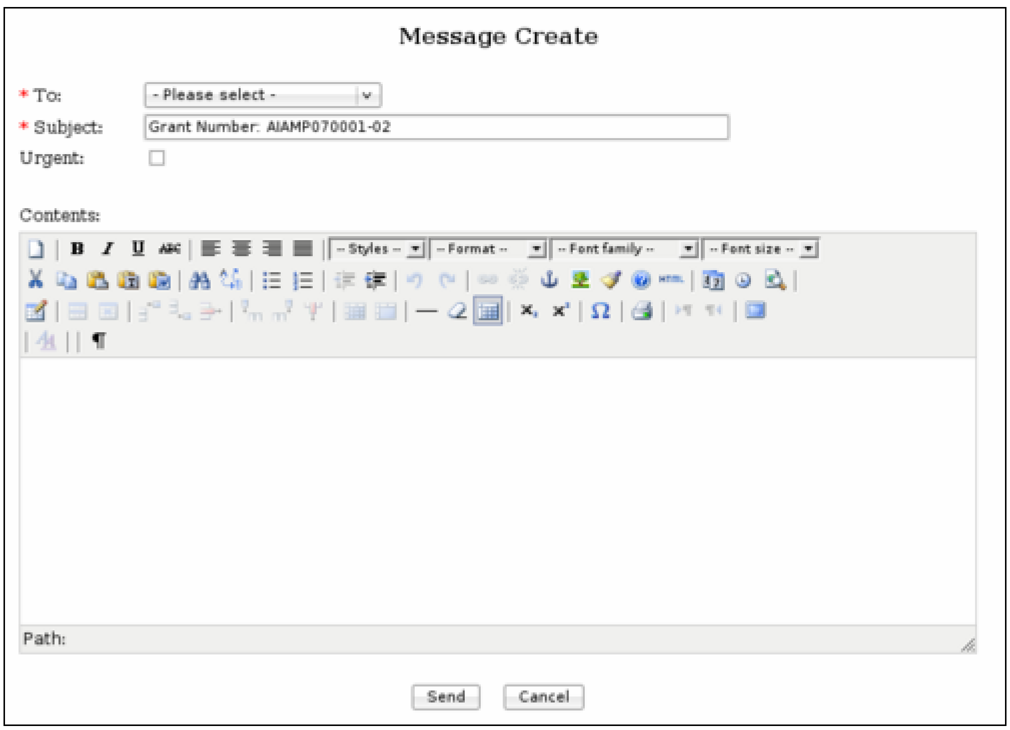

Figure 1 Message Create Screen

To Send a Message:

- Click the **To** drop-down list and select a name from the filtered list. (Messages can only be sent to other users of GrantSolutions).
- New messages will default to the selected grant or application number.
- An in-browser text editor allows formatting of message content.

Enhancements

GrantSolutions features a new Section 508 compliant menu.

Figure 2 Drop-down menu structure

1. The menu options have not changed significantly.
2. The new "look and feel" uses a common, *drop-down* method of navigation.
3. A breadcrumbs navigation feature has been added that assists users in keeping track of their location within GrantSolutions.

Announcement Assignments

Implemented a modification that removes assigning specific staff to an announcement. Area Workload for Announcements is now controlled through Office Assignments. Using the Area Workload Screen, all staff assigned to offices that support an announcement may view all applications received for that announcement.

Post Award Actions and Post Award Action Kits

Implemented a modification for the Administrative module that makes Post Award Actions and Post Award Action Kits Global and Partner specific.

From the Admin module, existing Global Post Award Actions or Post Award Action Kits are available to the SA, GMO and GMS.

The SA may add, edit and delete *global* Post Award Actions or Post Award Action Kits. The GMO from a specific partner manages *partner-specific* post award actions and action kits.

NOTE: Other user roles do not have access to the Admin Module.

Global Post Award Actions

To access:

- Login to the Admin Module.
- Select the **Data Reference** option from the Main Menu.
- From the Look-up Table Maintenance screen.
- Select the "Global Post Award Action" option
- Select the **Retrieve** button.

Once a list of global post award actions displays:

- Select the **Add** button to create a new global post award action.
- Alternatively, select the **edit** or **delete** link adjacent to the award action to update or remove.

Global Post Award Action Kits

Once a global post award action is created, the SA may view or edit an associated Post Award Action Kit. The SA has the system authority to create and manage post award action kits that are accessible by all GS agencies.

To access:

- Login to GrantSolutions
- Select the **Grants Workload Management** option from the Main Menu
- Select the **Global Post Award Action Kit Management** sub-menu option.

Once the alphabetical listing of existing global post award action kits appears

- Select the **Add** a Post Award Action Kit button to create a kit
- Select the **Edit** link to update the various forms and enclosures for the existing kit; change the order of the categories of inclusions in the kit; or modify parameters for the inclusions in the kit.
- Alternatively, select the **View** link to view/display the selected post award action kit.

NOTE: The SA may manage only global award action kits.

Manage Partner Post Award Actions

Within GrantSolutions, the GMO has the authority to create and edit post award actions for the GMO's Partner organization. The GMO manages Partner specific actions, makes them private and accessible only to the individual partner.

NOTE: Partners have access to all Post Award Actions within their GPTs

To access:

- Select the **Grants Management** option from the Main Menu.
- Select the **Post Award Actions** sub-menu option.
- Select the **Post Award Actions Management** option.

Once a list of global and partner post award actions displays:

- Select the **Printable Version** link to print a list of the Post Award Actions.
- Select the **View Global** link (adjacent to a Global action) to view a global post award action.
- Select the **View Global** link (adjacent to a Partner action) to view a global post award action previously converted to a partner action.
- Select the **Convert Global** link to convert a global action to a partner action. This allows the GMO to modify the Global data values and **save as** a Partner action; using the same or a different name.
- Select the **Suppress** link to suppress a Global post award action from the Partner's list of amendment types for the Partner organization (when an amendment is created). The link is replaced with an Unsuppress link.

NOTE: A GMO can't delete a global action.

- Alternatively, the GMO may select the **Unsuppress** link to reverse a suppressed action. The link is replaced by a Suppress link.
- Select the **Edit Partner** link to update the data values and modify existing partner actions.
- Select the **Delete Partner** link to delete an existing Partner post award action and the link is replaced with an Undelete Partner link. The GMO may undelete a global action that had been deleted.
- Select the **Add Partner Action** button to create a new Partner action that does not have an associated kit. A post award action kit must have at least one enclosure.

NOTE: GMOs assigned to more than one partner organization must specify which partner the post award action is for.

- Click the **Show Deleted Partner Actions** button to view and manage partner actions marked for deletion.

Manage Partner Post Award Action Kits

Within GrantSolutions, the GMO has the authority to create and edit post award action kits for the GMO Partner organization. The GMO manages partner specific kits; makes them private and accessible only to the individual partner.

NOTE: Partners have access to all Post Award Action Kits within their GPT.

To access:

- Select the **Grants Management** option from the Main Menu.
- Select the **Post Award Actions** sub-menu option.
- Select the **Post Award Action Kit Management** option.

Once a list of global and partner post award action kits displays:

- Select the **Printable Version** link to print a list of the Post Award Action Kits.
- Select the **View Global** link (adjacent to a Global Action Kit) to view a global post award action kit.
- Select the **View Global** link (adjacent to a Partner action kit) to view a global post award action kit previously converted to a partner action.
- Select the **Convert Global** link to convert a global action kit to a partner action kit. This allows the GMO to modify the Global data values and **save as** a Partner action kit; using the same or a different name.
- Select the **Edit Partner** link to update list of various forms and enclosures for the existing partner post award action kit; change the order of the categories of inclusions in the kit; change the order of the inclusions within each category in the kit; or modify parameters for the inclusions in the kit.
- Select the **Delete Partner** link to delete an existing Partner post award action kit and the link is replaced with an Undelete Partner link. The GMO may undelete a global action that had been deleted.
- Select the **Add Kit** button to create a new Post Award Action type, where the kit has not been created.
- The GMO selects the Post Award Action type from a *drop-list* of agency specific types.
- Select the **Next** button.

NOTE: GMOs will not see Global Post Award Action types on the list that do not have a kit.

GMOs that are assigned to more that one partner organization must specify which partner the Post Award Action is for:

- Select the Partner from the *drop-down* list.

- Click the **Reload** button.

NOTE: A post award action kit must have at least one enclosure.

Update Person Record

An enhancement has been added to GrantSolutions that allows Grants Staff to update a PI/PD person record for existing assigned grantee staff during the award drafting and post-award processes.

This functionality is available from the following screens:

1. My Grants List (MGL) Screen
    - Select the **Grant Assignments** link.
    - Select the **Edit Person** link.
2. Notice of Grants Award List - In Process/Draft Screen
    - Select the **Grant Assignment** link.
    - Select the **Edit Person** link.
3. Change Grant Assignments Screen (for Post Award Grant Assignments)
    - Select the **Grants Management** option from the Main Menu.
    - Select the **Grant Portfolio** sub-menu option.
    - Select the **Grant Assignments** option.
    - Select the Edit Person link.

Miscellaneous Screen Updates

1. The My Grants List screen has been updated. When a search is executed and the retrieved list of grants displays, users will notice that column heading "Project Region" has been changed to "Program Office."
2. Previously, the state and zip code data in the Primary Address Information section of the PI/PD Person Screen at the bottom was blank. A modification was implemented and the information now pre-populates like other address fields.
3. A new search criteria field has been added to the Completed Awards Screen. A Grant Program can be selected from the *drop-list* to filter the retrieved list of completed awards by GPT.

Denali Commission

A modification was implemented to correct the five (5) federal funding lines that did not appear when creating Denali draft awards.

Administrative Module

1. Renamed the title of the Post Award Action Kit screen to "Global Post Award Action Kit.
    - To access:
        - Select the **Grants Workload Management** option from the Main Menu.
        - Select the **Global Post-Award Action Kit Management** sub-menu option.
2. A sort feature has been implemented within the Manage Service Area screen. Once a search has been performed, the results listing are sorted in ascending order by default.
    - Click the Orange **Partner Ascending** column heading to sort the results list in descending order by Partner name. The column heading changes to Partner Descending.
    - Click the **Description** column heading to sort the results list in ascending order by Service Area. The column heading toggles to Description Ascending.
    - Click the **Grant Code** column heading to sort the results list in ascending order by Grant Code. The column heading toggles to Grant Code Ascending.
    - Click the **Action** column heading to sort the results list in ascending order by action type. The column heading toggles to Action Ascending.

NOTE: GrantSolutions displays the *column-headin*g controlling the sort in **Orange**.

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3. A new feature/screen has been added that allows the System Administrator (SA) and Program Administrator (PA) to create or change Area Workloads for a Grant Program. For detailed information, see the Announcement Assignments section.

Award Workflow

1. To accommodate a Financial Office that is separate from the Program Office, a Budget Officer Review Required option has been added to the Grant Program Type screen.
    - From the Administration Module:
    - Once a search for the Grant Program (GPT) has been performed.
    - Users may select Yes to add the Budget Officer role as staff member to certify funds for the draft NGA.

NOTE: This staff member uses the FMO role.

Post Award Prior Approval Process

An optional bypass feature was implemented to streamline the Post Award Prior Approval process. Grants staff may approve an amendment and request that Program Staff enter the amount of new funds approved for the action; which will be added to the total approved budget for the NGA processing.

To approve an amendment when the Prior Approval Memo is not required and the Approval bypass is allowed:

From the Administration Module:

- Select the **Grants Workload Management** option from the Main Menu.
- Select the **Programs** sub-menu option.

Once a search has been executed:

- Select the **Manage GPTs** link adjacent to the Program Name
- Select the **Edit** link.
- Select the **Yes** radio button
- Click the **Save** button.

NOTE: The default setting for the Amendment Approval Bypass Allowed field is set to No.

Federal Railroad Administration (DOT/FRA)

Implemented the following NGA formatting and workflow customizations for the Federal Railroad Administration (FRA)

1. Since the Financial Office is separate from the Program Office an additional award workflow layer was added that allows the Program Office Budget Staff to "Certify Funds" for the draft NGA.
    - This layer was placed between the Award Drafted/In Review state and the Program Manager Approval state.
2. For DOT/FRA, the AO approves the final award release date once the Grantee accepts.
3. Database changes have been implemented within GrantSolutions to accommodate FRA in generating uniquely defined number formats for application numbers, grant numbers, and other numbers used throughout the system.
    - Format for the core grant number: FR-LRI-0123-08-01-00
4. NGA format and field mappings have been implemented for the DOT/FRA NGA form.

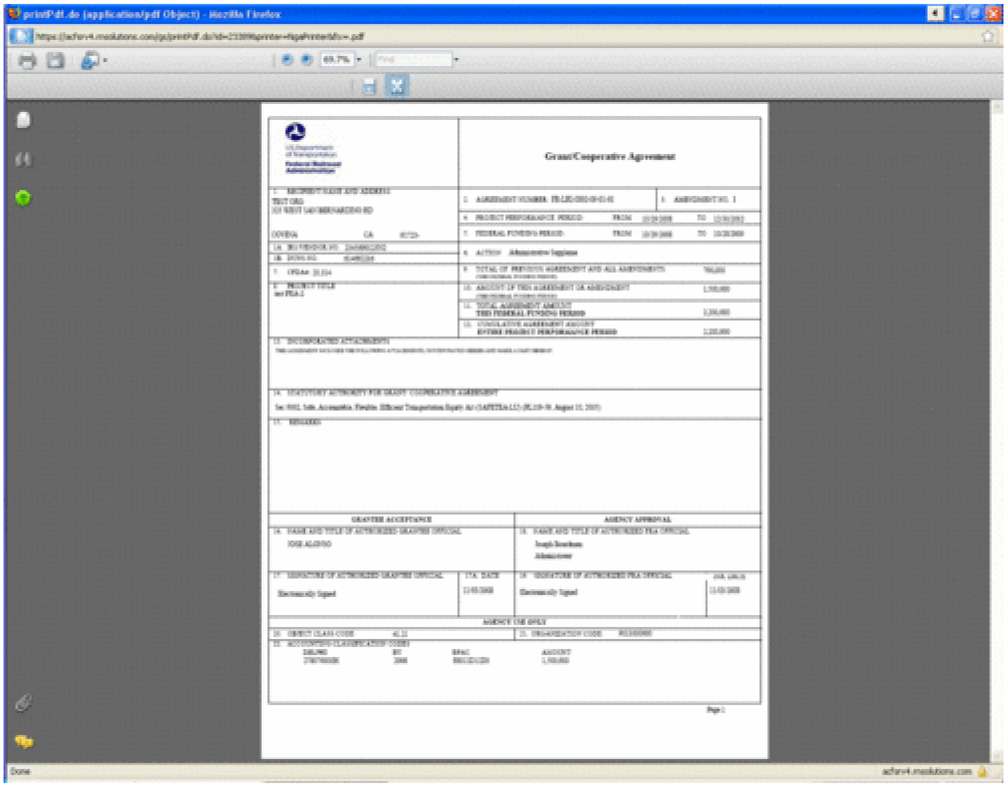

Figure 3 FRA NGA.

Administration

Manage Service Area

Service Areas are used to distribute workload or competitions within a Grant Program. A Service Area allows workload division and the Manage Service Area Screen allows the System Administrator (SA) to create and delete Service Areas.

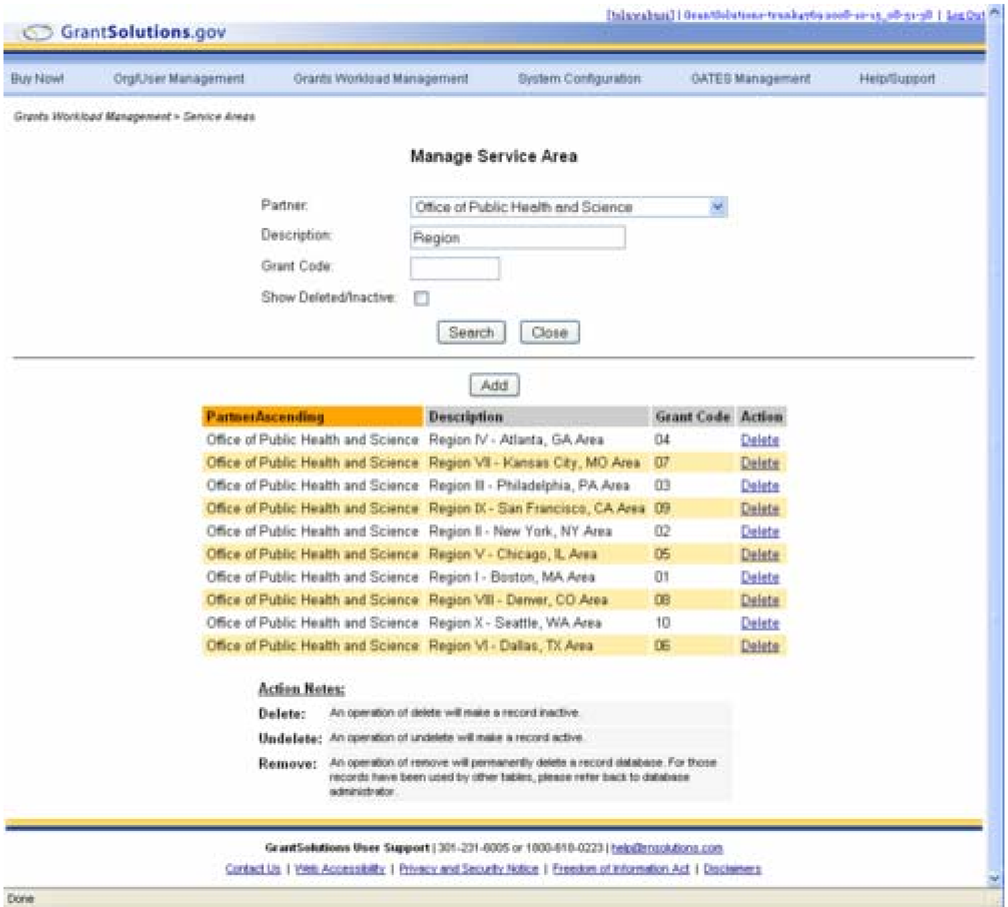

Figure 4 Manage Service Area

The PA must be assigned via Admin Manage Program Office Staff Assignment to at least one Program Headquarters Office (PHO).

The Manage Service Area Screen allows the SA to add and delete Service Areas.

To access:

- Select a **Partner** from the drop-down list
- Enter a **Description** of the service area.
- Click the **Search** button.
- Click the **Add** button to add a Service Area and enter a Description and Grant Code. (The grant code is used to generate the Grant Number).

Manage Area Workload

Accessed from the Administration module once a successful login has been initiated:

- Select the **Grants Workload Management** option from the Main Menu.
- Select the **Programs** sub-menu option.

From the Manage Programs Screen execute a search by Program name.

- Select the **Manage GPTs** link adjacent to a Program Activity.
- Select the **Workload** link adjacent to the GPT.

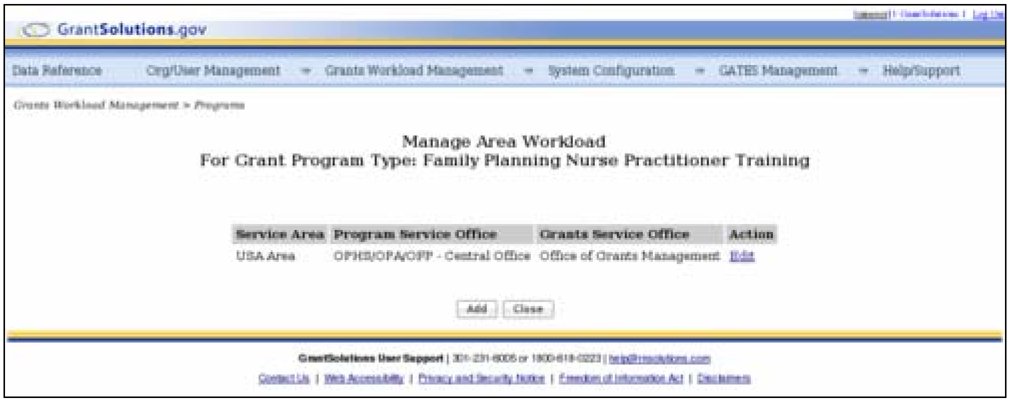

Figure 5 Manage Area Workload

Manage Area Workload

The Manage Area Workload Screen identifies the Service Offices managing the work for a specific Grant Program for a specific Service Area. One Grants Service Office and one Program Service Office must be assigned. The Service Area is assigned to an announcement.

To create a new area workload:

- Select the **Add** button.
- Select a Program Service Office from the *drop-down* list of offices, which are filtered based on the Service Area selection.
- Once saved, any user assigned to an office, which is assigned to the announcement has access to all applications submitted for that announcement.