

GrantSolutions 3.4 Release Notes – Federal Staff

General Improvements

1. Email notifications will be sent *only* for electronically submitted applications and not for paper submissions.
2. The Internet Explorer (IE) Version 7 alignment issues have been corrected.
3. When accessing the [Help/Support](#) Main Menu option from GrantSolutions, the pop-up window now displays GrantSolutions' content, Internet Explorer (IE) menus and the address box.
4. Implemented a new error message, during award processing that displays the available balance for a CAN when an obligation amount is over the available balance.
5. Improved the performance of the NGA Processing screen. When issuing an NGA, users will notice the Add Comments pop-up screen has an improved processing time.
6. Implemented Page level help and improved field level help on many of GrantSolutions' pages.
7. Miscellaneous program adjustments and performance improvements have been implemented.
8. Minor menu changes have been implemented for the new Funding Memo screen. For details, see the [Funding Memo](#) section below.
9. Corrected the Page Help information that displays on the Grant Assignments page.

Funding Memo (New)

With this release, a complete re-engineering of the Funding Memo process has been implemented. The Funding Memo process merges three similar processes (competing, non-competing and prior approval memos) into a single configurable workflow. One screen now displays the status of all three memo types, memos that are ready for award and memos that have been generated for award.

1. The following screens have been combined into the new and improved Funding Memo screen.
 - Competing Application Recommendation and Funding Memo
 - Non-competing Application Recommendation and Funding Memo
 - Funding Memorandum Log
 - Approved Amendment Log
2. Implementation of a new search feature, which can be performed for available Funding Memos:
 - The **Application Type** can be used as criteria. Available from a *drop-down* list, the Application Types are displayed in two groups:
 - Competing, Non-Competing, Amendment
 - New, Competing Continuation, Directed Supplement
 - A full or partial search may be used for the **Application Number** and **Grant Number** fields for a search that retrieves more than one record (i.e., FPH for the Program Type or 5 for the Grant Type code) respectively.
 - **Workflow States** can be used as search criteria. The first row contains the *most commonly used* states.
 - **All Status** – is the default selection and searches for all workflow states *except* “Complete.” When selected all workflow states are unavailable for checking.

NOTE: Un-check the “All Status” workflow state to select one or a combination of the individual workflow states as criteria.

- **Not Started** – is for applications that have not been associated with a Funding Memo.
 - **Complete** – is *exclusive* and selecting this state un-checks all or any checked workflow state.
- The remaining Workflow States are displayed in four horizontal rows and listed in alphabetical order.

Administrative Review	Deputy Review	Draft Exception	Grants Review	Research Review
Approved	Director Review	Financial Review	Ready For Approval	Staff Review
Budget Review	Disapprove	Review	Override	
Coordinator Review	Review	Funds Not Certified	Ready to Approve	
Review	Disapproved			

3. Each Grant Program can be configured to require a specific set of workflow steps or a *bypass* can be applied for select workflow steps. The [Approvals Workflow](#) engine, implemented for the Funding Memo, provides more flexibility for Pre-Award and Post-Award application approvals. Based on Grant Program configuration and workflow state, the following actions can be performed from the Funding Memo screen:
 - Search
 - Edit/Delete
 - View Funding Memo History
 - Set the Budget Period
 - View the Full Review
4. Once a Funding Memo has been started or disapproved, the application will no longer display on the Disposition List or the Funding List.
5. Accessing the Funding Memo from the Main Menu has minor changes. Users may continue to access the Funding Memo from the Applications Main Menu option by:
 - Selecting [Applications, Funding Memo](#).
 - Selecting [Applications, Competing, Funding Memo](#).
 - Selecting [Applications, Non-Competing, Funding Memo](#).
6. Users accessing the Funding Memo from the Award Main Menu option will find the Funding Memo option is now a secondary menu selection.
 - Select the [Awards](#) Main Menu option.
 - Select the [Funding Memo](#) sub-menu option
7. Page level help is available from the Funding Memo screen and improved field help.
8. An Approval History section has been added to bottom of the Program Recommendation and Funding Memo screen. The Approval History displays a listing of actions performed on the selected Funding Memo. Each action taken (i.e., recommendations and approvals) is displayed in

a table format and contains the User Name and Date the action was performed, the Task that was initiated (i.e., Staff Review), and any comments that were added.

Funding Memo Workflow

The Funding Memo **Approval Workflow** is based on Grant Program Funding Memo Workflow Settings. Available from the Administrator Module's Edit Grant Program screen:

- Select the [Grant Workload Management](#) Main Menu option.
- Select the [Programs](#) Sub-menu option.
- Perform a **Search** for a Grant Program
- Select [Manage Grant Programs](#)
- Select [Edit](#)

The following approval layers can be added or *bypassed* based on individual Partner preferences. A Workflow Approval by the Authorizing Official (AO) is required for all Partners; even when a bypass has been initiated.

For Pre and Post Award:

1. The "Budget Review Required" approval layer can be added as a required layer when the Program Budget Officer (PBO) must perform a "Budget Review." Once the PBO selects "Concur or Non-Concur," the Funding Memo approval workflow advances to the next layer. Selecting Reject returns to Draft.

NOTE: Textual Comments must be entered (required) when Non-Concur or Reject is selected.

2. The "Staff Review Required" approval layer can be added as a required layer when the Project Officer (PO) must perform a "Staff Review." Once the PO select "Concur or Non-Concur," the Funding Memo approval workflow advances to the next layer. Selecting Reject returns to Draft.

NOTE: Textual Comments must be entered (required) when Non-Concur or Reject is selected.

3. The "Coordinator Review Required" approval layer can be added as a required layer when the Program Coordinator (PC) must perform a "Coordinator Review." Once the PC selects "Concur or Non-Concur," the Funding Memo approval workflow advances to the next layer. Selecting Reject returns to Draft.

NOTE: Textual Comments must be entered (required) when Non-Concur or Reject is selected.

4. The "Research Review Required" approval layer can be added as a required layer when the Research Director (RD) must perform a "Research Review." Once the RD selects "Concur or Non-Concur," the Funding Memo approval workflow advances to the next layer. Selecting Reject returns to Draft.

NOTE: Textual Comments must be entered (required) when Non-Concur or Reject is selected.

5. The "Director Review Required" approval layer can be added as a required layer when the Office Director (OD) must perform a "Director Review." Once the OD selects "Concur or Non-Concur," the Funding Memo approval workflow advances to the next layer. Selecting Reject returns to Draft.

NOTE: Textual Comments must be entered (required) when Non-Concur or Reject is selected.

6. The “Administrative Review Required” approval layer can be added as a required layer when the Administrative Director (AD) must perform an “Administrative Review.” Once the AD selects “Concur or Non-Concur,” the Funding Memo approval workflow advances to the next layer. Selecting Reject, returns to Draft.

NOTE: Textual Comments must be entered (required) when Non-Concur or Reject is selected.

7. The “Grants Review Required” approval layer can be added as a required layer when the Grant Management Officer (GMO)/Grants Management Specialist (GMS) must perform a “Grants Review.” Once the GMO/GMS Approves (if \$0 Amendment – advances to the Authorizing Official (AO)) or Disapproves (if \$0 Amendment – advances to Reopen Retention Period), “Concur or Non-Concur,” the Funding Memo approval workflow advances to the next layer. Selecting Reject returns to Draft.

NOTE: Textual Comments must be entered (required) when Disapprove, Non-Concur or Reject is selected.

8. The “Financial Review Required” approval layer can be added as a required layer when the Financial Management Officer (FMO) must perform a “Financial Review.” Once the FMO selects “Funds Available,” the Funding Memo approval workflow advances to the next layer. Selecting Funds Not Available – advances to a “Funds Not Available” state, which can then be disapproved or returned. Selecting Reject returns to Draft.

NOTE: Textual Comments must be entered (required) when “Funds Not Available” or Reject is selected.

9. The “Deputy Review Required” approval layer can be added as a required layer when the Deputy Authorizing Official (DAO) must perform a “Deputy Review.” Once the DAO selects Concur or Non-Concur, the Funding Memo approval workflow advances to the Authorizing Official (AO). Selecting Reject returns to Draft.

NOTE: Textual Comments must be entered (required) when Non-Concur or Reject is selected.

10. The “Disapprove Review Required” approval layer can be added as a required layer when the Grants Management Officer (GMO) must perform a “Confirm Disapproval.” Once the GMO agrees with the Disapproval, the Funding Memo approval workflow advances to the Reopen Retention Period.” Selecting Disagree sends it to Approval.

NOTE: Textual Comments must be entered (required) when Reopen is selected.

For Post Award only:

The “Reopen Retention Period” disapproved layer can be added as a required layer where once disapproved, the Post-Award Amendment Funding Memo can be reopened. The default is up to 30 calendar days. In the event the Funding Memo is not reopened during the "Reopen Retention Period,” the Funding Memo will progress to a “Completed” state and can't be reopened and if needed a new Amendment must be created and approved.

Authority Privileges:

Configuration for the Funding Memo Workflow is independent between Pre-Award and Post-Award. Authority privileges may be configured by each User Role or Group. Multiple authorities may be selected.

- For Pre Award - Edit/Draft, Bypass and Reopen privileges
- For Post Award - Edit/Draft, Bypass, and Reopen privileges

United Financial Management System (UFMS) Proxy

1. A separate interface between GrantSolutions and UFMS has been implemented to handle transaction files generated by GrantSolutions for Accounting Funds checks. The UFMS Proxy manages the transactions and provides available and/or unavailable funds information as an Accounting System service.
2. GrantSolutions continues to manage award actions, while the UFMS Proxy manages funds checking, and the import and export of accounting files, award transactions, and error files.

Enterprise Reporting System (ERS)

GrantSolutions will be integrated with ERS to support new reporting capabilities. GrantSolutions will populate data to the Enterprise Reporting System (ERS) when the following information is created, updated, or deleted.

- Announcement
- Application
- Award
- Person
- Organization
- Program
- Project
- Grantee

Partners

Department of Transportation (DOT)/ Federal Railroad Administration (FRA)

1. Implemented a correction to the NGA Draft screen that allows selection of a GMO and PI/PD. DOT/FRA users may now view issued NGAs on the “Completed Awards” and “My Grants List” screens.
2. A new role has been implemented for the Department of Transportation (DOT)/ Federal Railroad Administration (FRA).
 - Assigned to the Program Headquarters Office, the Program Budget Officer (PBO) is responsible for the first award approval workflow.
 - Added into the new Pre-Award and Post-Award Funding Menu Workflow process, the PBO role performs the “Budget Review” layer of approval, which is placed between the “Draft” and “Staff Review” statuses.
3. The PBO has access to the NGA Processing screen and approves NGAs that are “Ready for Budget Officer Approval.” Additionally, the PBO may add Grant Notes and View Prior Approval Memos.

Department of State (DOS)/GTIP

The Partner Agreement Categorization field has been initialized on the Draft NGA Screen. For Department of State users, the defaults are as follows:

- All checkboxes are unselected for type New
- All checkboxes are unselected for Competing Continuation types.
- For all other actions, the checkboxes are selected on prior NGAs.

Admin Module

1. Implemented a configuration within the Admin Module that processes SQL error notifications and emails the messages only to System Administrators within a configured group.
 - A new role has been implemented for Department of Transportation (DOT)/ Federal Railroad Administration (FRA).
 - Assigned to the Program Headquarters Office, the Program Budget Officer (PBO) is responsible for the first award approval workflow.
 - Added into the new Pre-Award and Post-Award Funding Menu Workflow process, the PBO performs the “Budget Review” layer of approval, which is placed between “Draft” and “Staff Review” statuses.
2. The PBO has access to the NGA Processing screen and approves NGAs that are “Ready for Budget Officer Approval.” Additionally, the PBO may add Grant Notes and View Prior Approval Memos.