

GrantSolutions 3.8 Release Notes – Federal Staff

General Improvements

- Name change was implemented for Funds Control items. The term CAN has been changed to “Financial Account” on all GrantSolutions screens and all references to Federal have been changed to "Grantor."
- Implemented a “clean-up” of Person data that removes duplicate records.
- The following information has been added to My Grants List (MGL).
 - Amendment Number:
 - Budget Period Number:

NOTE: Once a search is executed, this information displays directly under the grant number.

New Online Form

With this release, Form SF 424 C Construction Programs is available for online completion and submission. The form is used when preparing Budget data and integrates with the NGA Budget Worksheet under the “Total Construction” category.

- The completed application is available for printing from GrantSolutions' EACC page.

Contact Management

The following improvements have been added to enhance the functionality available from the Manage Contacts screen.

- Enhanced the widget dialog box by adding Contact Type (i.e., Grantee, PI/PD, 424 Contact, etc.) and informational "Notes," which can be added about the contact individual.
- When adding a new contact, duplicate names (Contacts) are not permitted and an error message displays when attempted.

Risk Management

Enhanced the way weights are managed on the Risk Questionnaire screen. When creating the Questionnaire Details, managing the weights can be accomplished as a separate action.

- Once the questions have been entered and saved.
- Calculation errors display upon saving the question.
- Select the **Adjust Weights** button
- The **Total Weights**: value will adjust each time the individual weights values are adjusted.

NOTE: When entering values, it is not necessary to enter the decimal.

- When finish, select Save and GrantSolutions returns to the Questionnaire Details screen and adds the decimal.

Grants Assignment

Partners may create an applicant or Grantee user account for Grantees without an existing account, during the “In Review” state of award workflow or when in the “Draft” state of award workflow.

The GQC or higher Authority may create the user account and set a user role for the Grantee Acceptance Award workflow process from the Grant Assignments Screen. Accessible from the My Grants List (MGL) once a search has been performed, the Grant Assignment Screen displays all project level assignments.

- From My Grants List (MGL) screen.
- Select the [Grant Assignment](#) link adjacent to the selected Project.
- Select the [Add PI/PD](#) link
- Select the radio button adjacent to **Add New Person** text.
- Click the **Add** button.
- From the Add PI/PD Person screen complete all *required* (*) fields
- Scroll to the bottom and select the **Add & Create User Account** button and GrantSolutions returns to the previous screen.

NOTE: A notification is sent to the user about the account information.

- Alternatively, select **Cancel** to abandon the operation.

Project Categories Filter

The Project Categories screen allows users to apply a filter per login session to the following **filter function** screens:

1. Competing Application Receipt Log
2. Recommendation and Funding Memo
3. My Grants List (Federal Staff)

By default, the filter is set to “**All**” (Categorized & Not Categorized), which allows users to view all assigned Projects including projects without assigned Project Categories. However, once a filter is set and a search executed, the retrieved set of grant records *only* displays the selected Partner Project Categories selected from the users assigned Service Office.

To apply a filter:

- Once logged into the GrantSolutions application
- Select the **System Management** Main Menu option
- Select the **Search Preferences** sub-menu option.
- Select one of the three (3) available options:
 1. **All (Categorized & Not Categorized)** – Once a search is executed, *All projects* display including projects without assigned Project Categories.
 2. **Not Categorized** – Once this filter is set *only* Projects without Categories will display.
 3. **Select Categories from the following** – Place a check in one of the Project Categories, execute a search on one of the filter function screens, and only projects with the selected category display. When multiple categories are selected, execute a

search on one of the filter functions screens, and only projects with the selected categories display.

Alternatively, each of the filter function screens contains a link at the top of the page:

- When the filter is inactive, the screen will display a (Search filter: Disabled) link.
- Click the [Search filter: Disabled](#) link and the Project Categories Screen displays.
- Select a radio button, and then select a Project Category.
- Click the **Save and Close** button and GrantSolutions returns to the previous screen.
- Re-execute the search and the retrieved list displays the Project Category.

When the filter is active, each of the filter function screens will display a (Search filter: Enabled) link throughout the user session, until changed or logout.

- Click the [Search filter: Enabled](#) link and the Project Categories Screen displays.
- Select **All (Categorized & Not Categorized)**
- Click the **Save and Close** button, GrantSolutions returns to the previous screen, and the filter is disabled.

Admin Module

1. A new feature was implemented for the Admin Module when the Infrastructure Administrator (IA; previously System Administrator) creates a user account.
 - The IA may now reset a user's password without viewing the actual text. Once the password is generated and submitted, a notification is sent to users with the updated password.
 - Alternatively, the IA may reset a password by typing in specific text, should it be necessary, and a notification is sent to users with the updated password.
2. The Grant Program Admin screen now accommodates a designation for Discretionary and Mandatory grants. The new field name is **Grant Program Type**.

NOTE: When editing a Mandatory Grant Program, all discretionary fields are hidden.

3. A new section has been added to the Person Search Screen that displays historical assignments and allows the Infrastructure Administrator (IA) and Partner Staff Administrator to manage the Workload of Grants Staff by managing the Office Assignments.
 - Available from the Admin Module
 - Select the **Org/User Management** Main Menu option
 - Select the **People** sub-menu option
 - From the Manage Person Screen, once a search has been executed
 - Select the [Office Assignments](#) link to access the Person Assignments screen.
 - From the Person Assignments screen, Administrators can view previous office assignments.