

GrantSolutions 3.22 Release Notes

Notice of Award Processing Enhancements

One of the biggest changes impacting this release is when warnings and errors are displayed to users processing a Notice of Award (NoA or NGA).

With this release, NGA validation workflow warnings will now be provided on the screen to the user *before* the workflow transition has been completed. If the validations are warnings, the user has the option to review the warnings, ‘cancel’ and make changes to the NGA or proceed and ignore the warnings. (Previously, while users would be presented with “errors” prior to the workflow state changing, “warnings” were displayed to the user after the workflow transition had been completed.)

This change affects not just workflow transitions that move the workflow “forward” (Ready for Review, Ready for Approval, etc.) but also those “negative” actions (Reject, Return, Redo, and Recall).

The ability to enter a comment associated with the workflow transition has been retained.

Additionally, the warnings will be captured as a part of the workflow history.

For further information about these changes, please see the descriptions below:

Enhancement 1

Workflow Warnings Before the Workflow Transition Has Completed – Single Award

At the request of many users, GrantSolutions now displays warnings associated with an NGA workflow transition before the transition has been completed. This means that if a user selects an action such as “Ready for Review”, the system will display the warnings on the Comments screen prior to the transition being completed.

The validations associated with each workflow transition request will now be done after the user selects the transition action, (i.e., “Ready for Review”) and *before* the user can enter comments. This allows the user to determine whether or not he or she wants to proceed despite the warnings (OK) or to go back and make edits to the NGA (Cancel).

When moving an individual award, users will now have the option to view the warnings and then Continue or Cancel the workflow transition.

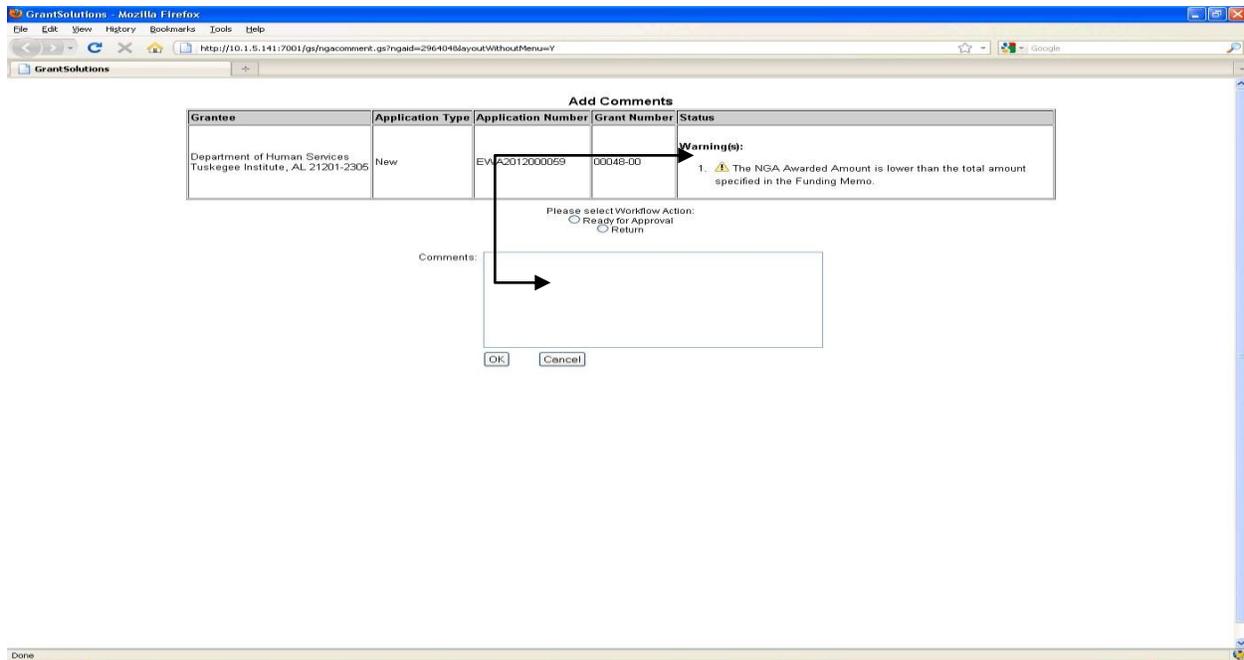


Figure 1- 1 - Workflow Warning Single Award

Enhancement 2

Bypassing Warnings on Multiple Award Workflow Transactions

If a user decides to perform a bulk workflow transition to two or more awards, they will have two options to take when they request the transition:

1. See the warnings before the transition is completed:
 - a. This option works much like the workflow transaction on a single NGA. The user:
 - i. Selects two or more NGAs to transition
 - ii. Chooses the transition action (Ready for Review, Approval, etc.)
 - iii. The system prompts with a comment box and the option to bypass warnings
 - iv. By simply clicking OK (and not selecting to by-pass the warnings), the user will be presented with the list of warnings associated with the records selected.
 - v. If warnings exist, users can then choose to make changes to the selected NGAs and then attempt to transition the workflow for the records again.
 - vi. If after seeing the warnings, the user wants to bypass them and transition the workflow anyways, he or she can do so by following the steps in the bypass approach below.

2. Choose to bypass the warnings and to immediately transition the workflow:
 - a. This option is intended for cases where the user intends to ignore any workflow warnings that may exist, perhaps because they already are aware of the issues (see the step above).
 - b. In this case, the user:
 - i. Selects two or more NGAs to transition
 - ii. Chooses the transition action (Ready for Review, Approval, etc.)
 - iii. The system prompts with a comment box and the option to bypass warnings
 - iv. The user then selects the checkbox “Bypass Warnings”
 - v. The user can enter a comment in the Comments box
 - vi. Selecting *OK* will send the selected NGAs to the processing queue

When transitioning multiple awards, a new check box has been added to the workflow transition screen (comment screen) that allows the user to bypass any warnings that may exist and will automatically move the award to the next workflow state. **Please note, the system will not bypass errors; if any errors exist the award will not transition, but remain in its existing state.**

If the bypass warning checkbox is selected the system does track this by creating an application note, and adding a “Warnings were bypassed” message on the Award Workflow History screen. An example of each of these automated messages is shown in the screen shots below.

Grantee	Application Type	Application Number	Grant Number
NEW BROCKTON, TOWN OF NEW BROCKTON, AL 36351-0100	New	EWVE2012000016	00015-00

Bypass Warnings:

Action Requested: ready for approval

Comments:

OK Cancel

Figure 1- 2 - Bypass Warning Comments

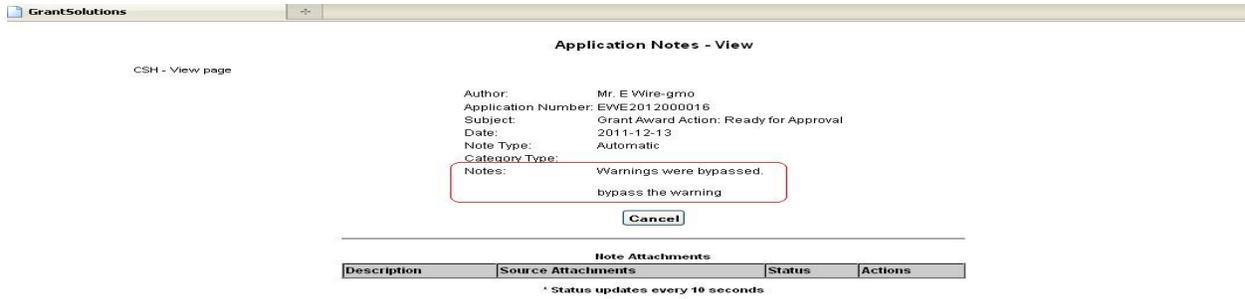


Figure 1- 3 - Bypass Warning Application Notes

Award Workflow History

Organization Name: NEW BROCKTON, TOWN OF
 Process Id: 40429378
 Start Date: 11/28/2011 10:15 AM (GMT - 05:00) Eastern Time (US & Canada)
 Grant Number: 00015-00
 Grant Program: Express Wireless Education for AQUA
 Initiator: Wire-gmo, E

User	Action	Task	Completed Date	Action Comments	Status
		Ready for Budget Officer Review			
E Wire-gmo	Ready for Approval	Draft Review	12/14/2011 09:26 AM (GMT - 05:00) Eastern Time (US & Canada)	Warnings were bypassed. It is approved and if there are any warnings then i would like to bypass them.	Warnings: ⚠ The NGA Awarded Amount is lower than the total amount in the Funding Memo.
E Wire-gmo	Recall	Ready for Budget Officer Review	12/13/2011 02:16 PM (GMT - 05:00) Eastern Time (US & Canada)	recall	
E Wire-gmo	Ready for Approval	Draft Review	12/13/2011 02:14 PM (GMT - 05:00) Eastern Time (US & Canada)	Warnings were bypassed. bypass the warning	Warnings: ⚠ The NGA Awarded Amount is lower than the total amount in the Funding Memo.
E Wire-gmo	Recall	Ready for Program Officer Approval	12/13/2011 02:11 PM (GMT - 05:00) Eastern Time (US & Canada)	recall	
E Wire-pbo	BOCertify	Ready for Budget Officer Review	12/13/2011 02:10 PM (GMT - 05:00) Eastern Time (US & Canada)	certify this award with the bypass flag on even though there are no warnings.	
E Wire-gmo	Ready for Approval	Draft Review	12/13/2011 02:08 PM (GMT - 05:00) Eastern Time (US & Canada)	ready for approval	
E Wire-gmo	Recall	Ready for Program Manager Approval	12/13/2011 02:07 PM (GMT - 05:00) Eastern Time (US & Canada)	recall	

Figure 1- 4 - Bypass Warning Workflow History

Enhancement 3

Negative Workflow Actions

“Negative” workflow actions such as *Reject*, *Return*, *Redo* and *Recall* require text input by the user into the comments screen. When a user selects one of the above “negative” workflow actions from the Award List screen, they will now be prompted to enter a comment.

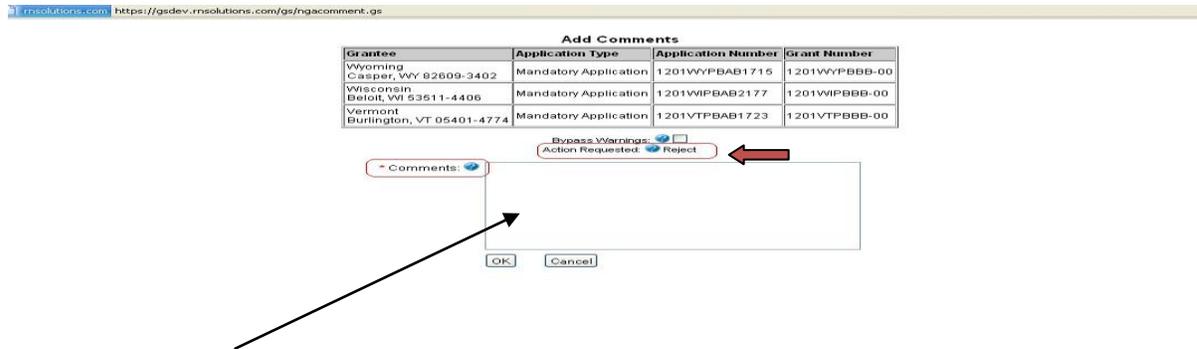


Figure 1- 5 - Negative Workflow Actions - Toggle

If a user does not enter a comment, the system will provide a reminder to the user that a comment is required to complete the workflow transition.

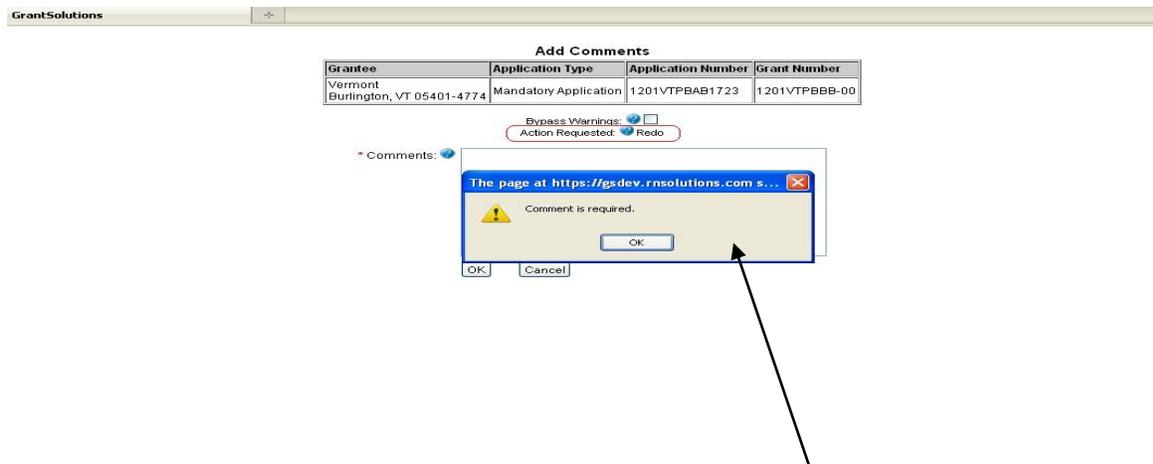


Figure 1- 6 - Negative Workflow Actions - Warning

Enhancement 4

Pre-Complete Delay Fixes

In earlier versions, should the user choose to manually expire the Pre-Complete delay, the system generated message displayed as “undefined” in the Status column of the Changed Notices of Grant Awards (workflow transition) page.

The Pre-Complete Delay is an award workflow state that exists to force a delay between when an award is issued and the workflow is completed. (Some partners configure this delay for 3 days to delay notification to their grantees.)

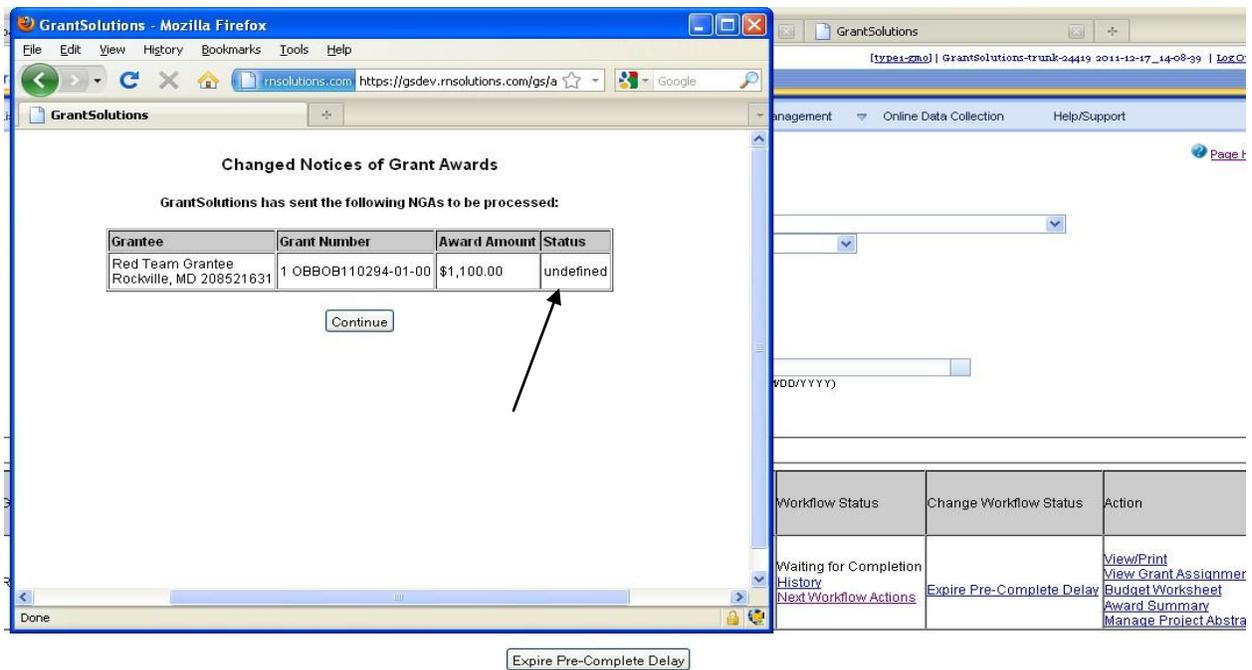


Figure 1- 7 – Pre Complete Delay Error

With the new enhancement, the the Changed Notices of Grant Awards (workflow transition) page will indicate a successful confirmation of the delay expiration action by entering a “Complete” entry into the status field.

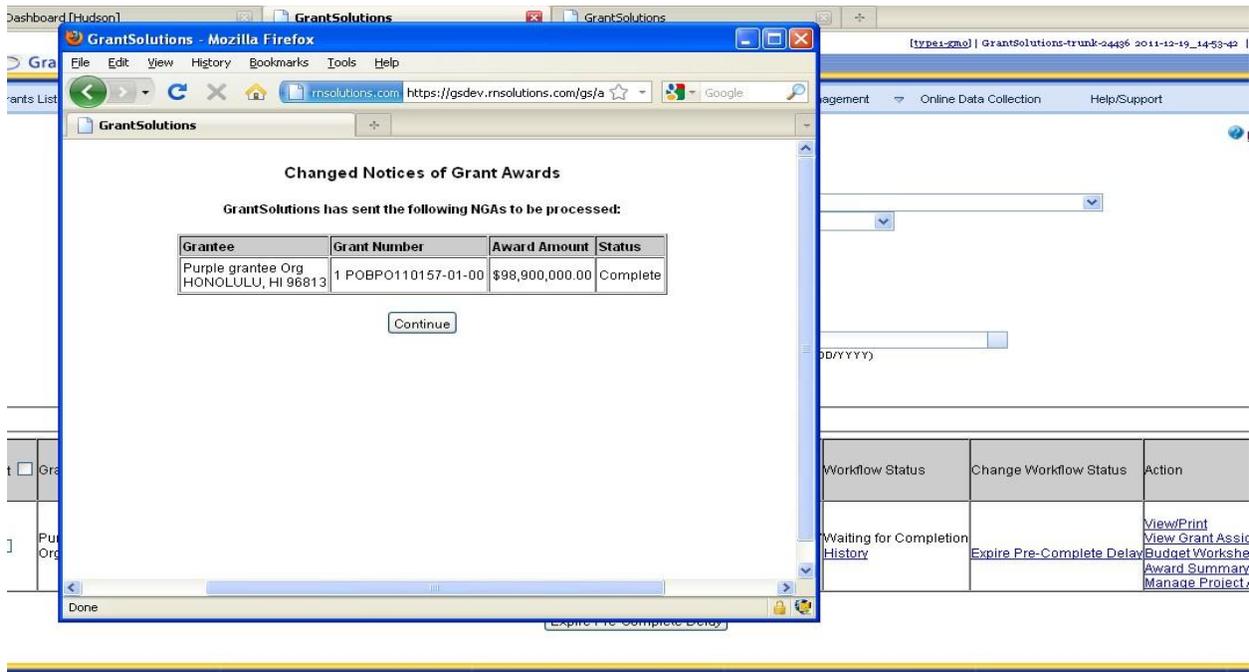


Figure 1- 8 – Pre Complete Delay Enhancement

Next Workflow Actions Improvements

In a recent release, GrantSolutions introduced the “Next Workflow Actions” feature. This allowed the ability for the user to see who currently can take action on a Funding Memo or Notice of Grant Award. This release brings some minor enhancements to that feature.

Enhancement 1

Replacing Acronyms with Detailed Authority Names

With the recently released feature that shows which users can perform the next workflow action, the latest version has replaced prior Acronyms with the detailed authority name. As the image illustrates below, the former GMO, GMS and AO have been substituted with the full titles for those authorities. (Example: GMO – Grants Management Officer.)

Reminder: Users can access the “Next Workflow Actions” on both the Funding Memo and Awards List screens.

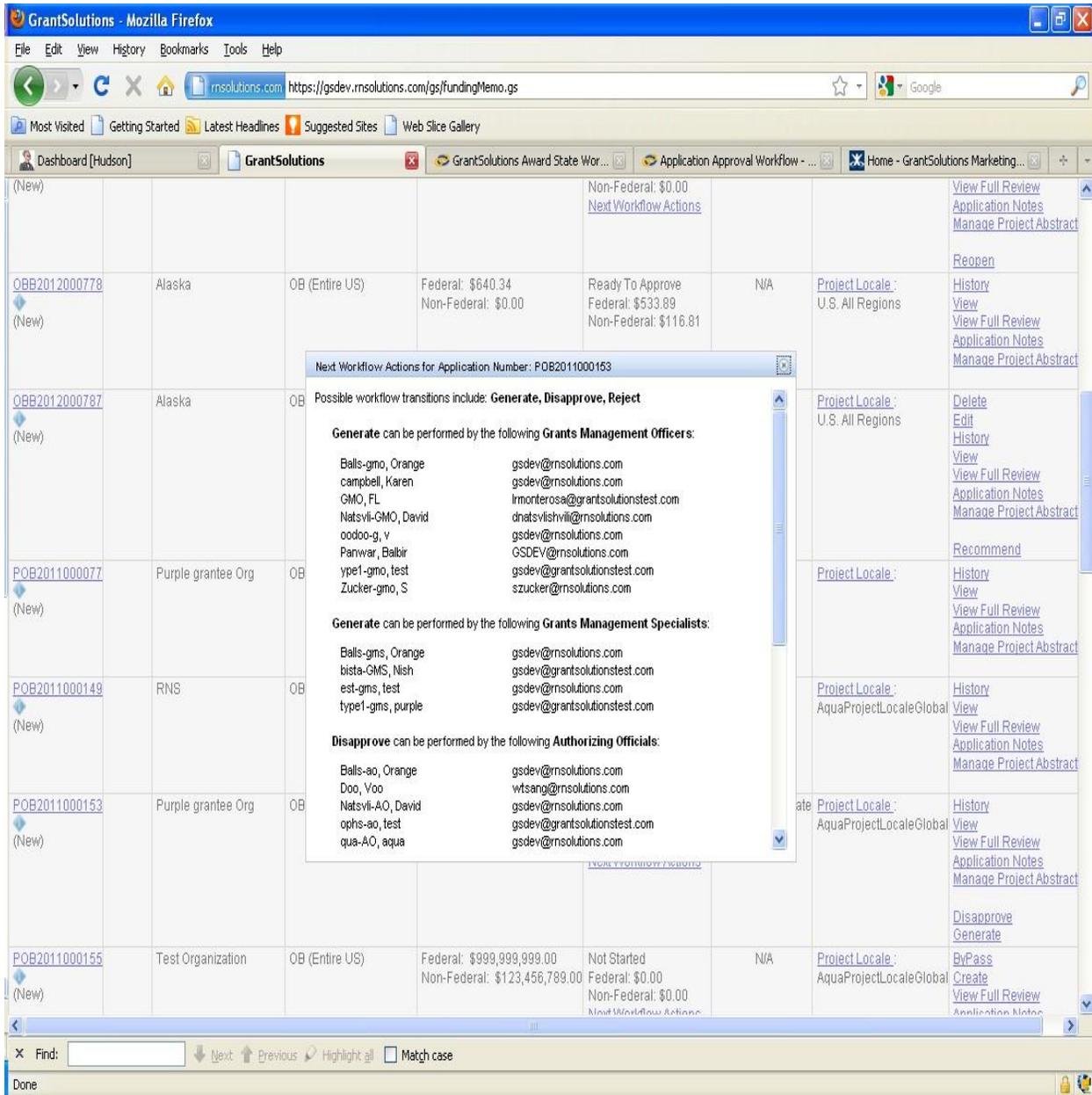


Figure 1- 9 - Acronym Replacements

Enhancement 2

Cancel / Close Icon Issue

Previously, if the user chose to drag the Next Workflow Actions dialog box all the way to the top of the screen, the cancel / close icon became hidden and there was no way the user could close the dialog box. The only solution was to reload the page.

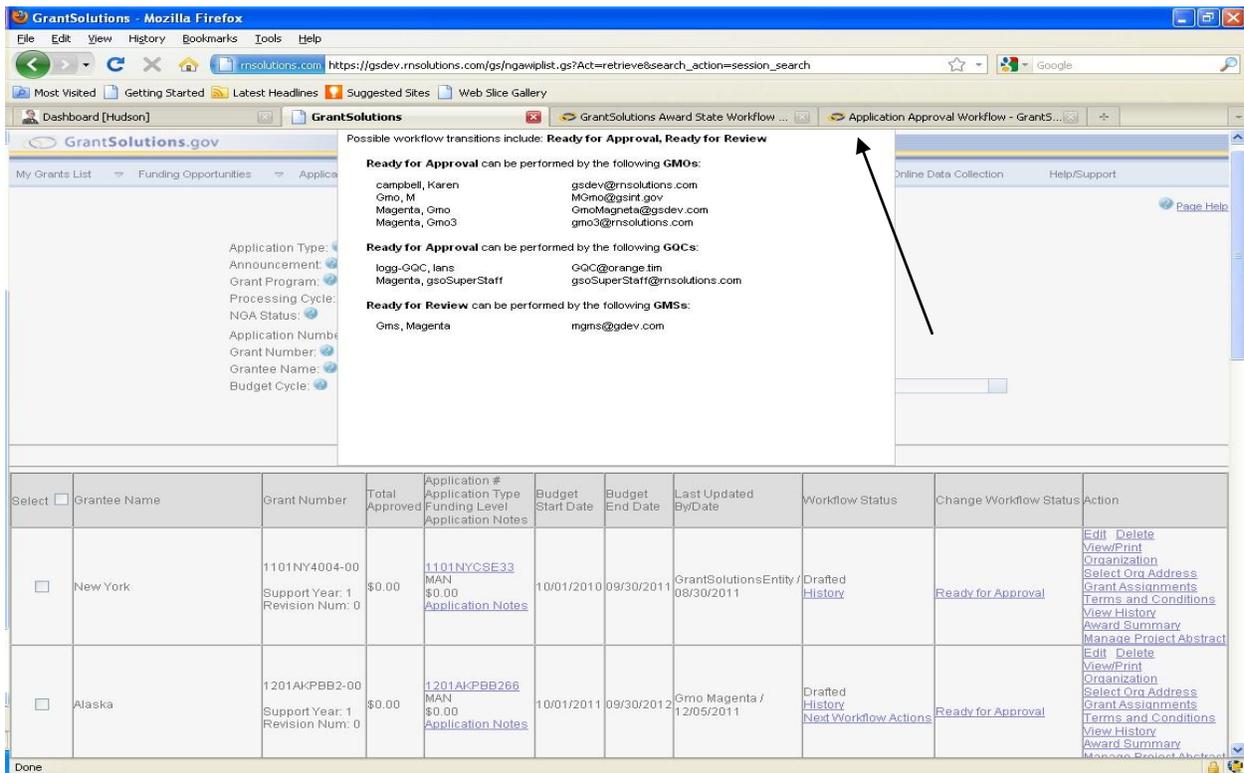


Figure 1- 10 – Cancel/Close Icon Error

The new release retains the cancel / close icon which becomes visible no matter where the location of the Next Workflow Actions popup screen is positioned.

The screenshot displays the Grants.gov search interface. On the left is a search form with fields for Application Type, Announcement, Grant Program, Processing Cycle, NGA Status, Application Number, Grant Number, Grantee Name, and Budget Cycle. A search button is located below the form. On the right, a pop-up window titled 'Next Workflow Actions for Application Number: 1202012000824' is open. It lists possible workflow transitions: 'Ready for Approval' and 'Ready for Review'. Under 'Ready for Approval', it lists users from Grants Management Office and Grants Quality Control. Under 'Ready for Review', it lists users from Grants Management Specialist. A red circle highlights a close icon in the top right corner of the pop-up window, with an arrow pointing to it. Below the pop-up is a table with columns: Grant Number, Total Approved, Application #, Application Type, Funding Level, Application Notes, Budget Start Date, Budget End Date, Last Updated By/Date, Workflow Status, Change Workflow Status, and Action.

Grant Number	Total Approved	Application #	Application Type	Funding Level	Application Notes	Budget Start Date	Budget End Date	Last Updated By/Date	Workflow Status	Change Workflow Status	Action
120CMS030551-01-04 Support Year: 1 Revision Num: 4	\$2,046,865.00	1202012000810	Supplement	\$2,046,865.00	View Prior Approval Memo Application Notes	02/22/2010	02/21/2015	cn=PSchimmel,cn=Users,dc=grantsolutions,dc=gov / 01/26/2012	Drafted History	Ready for Approval	Edit Delete View/Print View Last NGA Organization Select Org Address Grant Assignments Budget Worksheet Terms and Conditions View History Award Summary Manage Project Abstract

Figure 1- 11 – Cancel/Close Icon Enhancement

Grants List Grid

Grantee staff name search results is fixed and the search results are indexed properly. In previous version a user was unable to display a detailed name index when selecting the Federal Staff Name Filter within Advanced Search. When inputting any character entry for 'Federal Staff Name' filter the system generates an error message 'The Value entered is not valid'. Upon the actual search, all results are displayed except for Federal Staff.

Error on Federal Staff Name filter

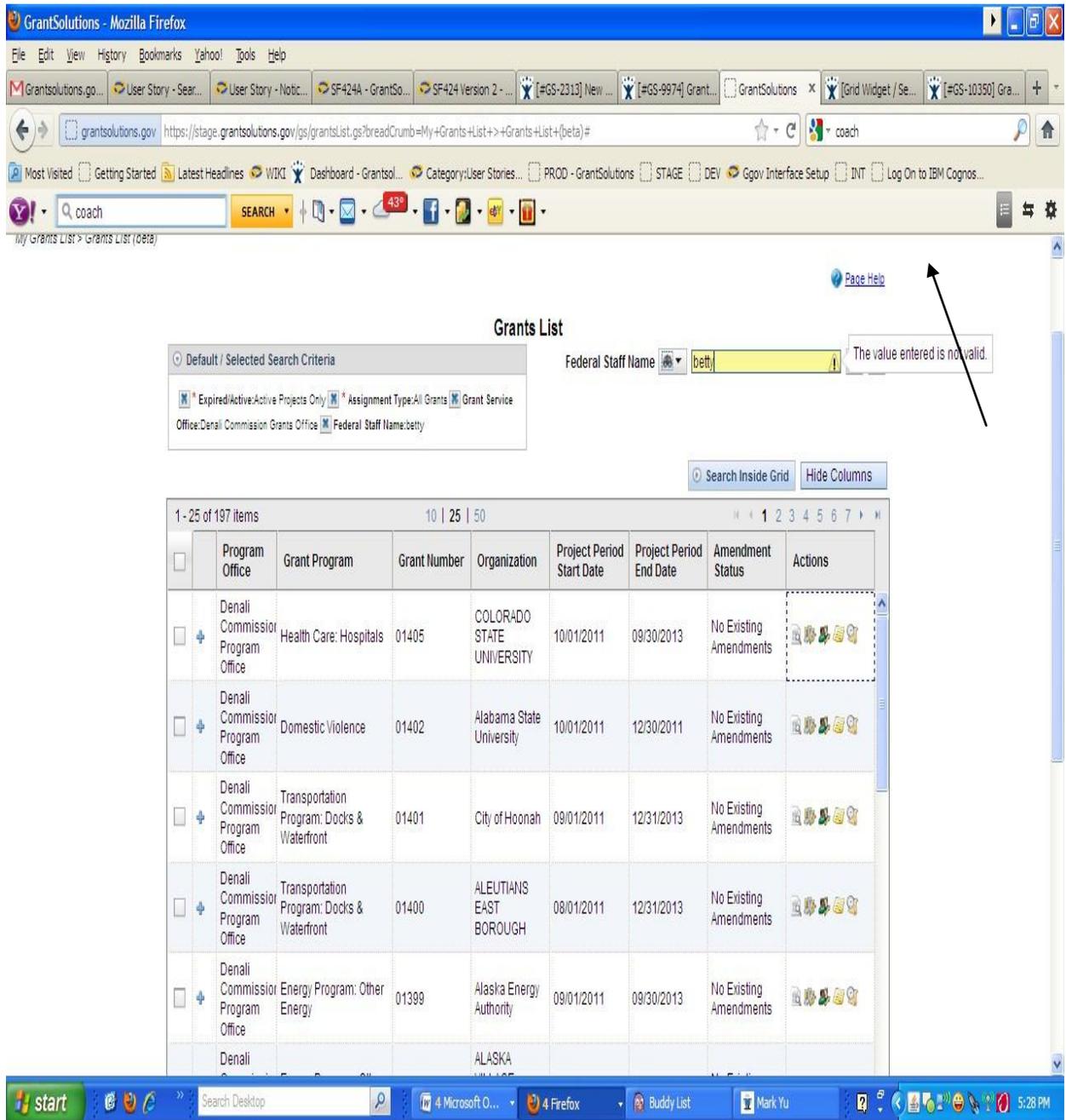


Figure 1-12 – Federal Search Error

The new release provides a complete index including all Federal Staff when one performs a search by name.

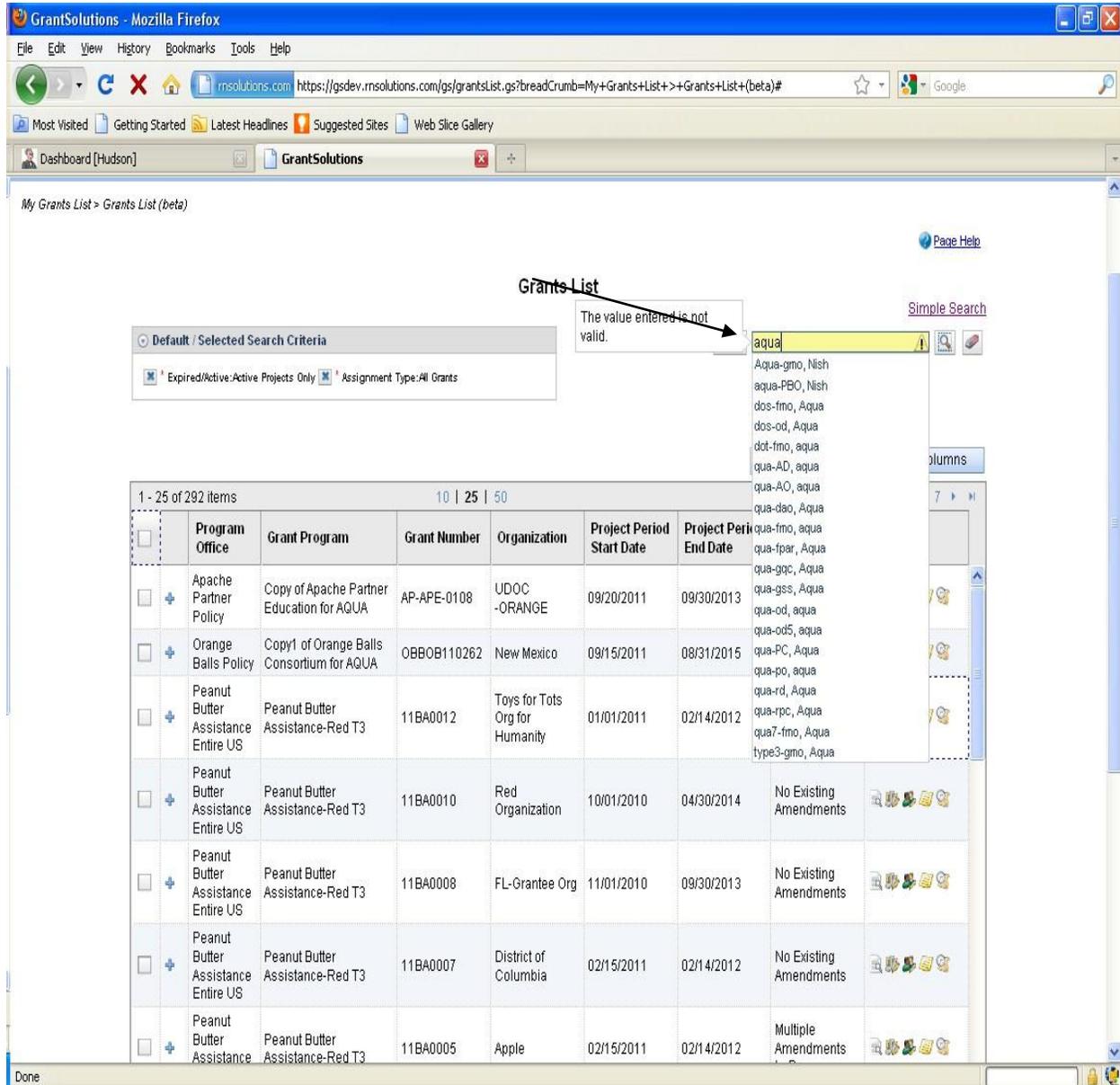


Figure 1- 13 – Federal Search Enhancement

Advanced Search Results Enhancements

The advanced search results on all “new” search screens have been enhanced to correct former issues and produce a consolidated grid widget.

An example is the removal of inconsistent overwrites and better messaging screens. The image below illustrates the former overwritten labels.

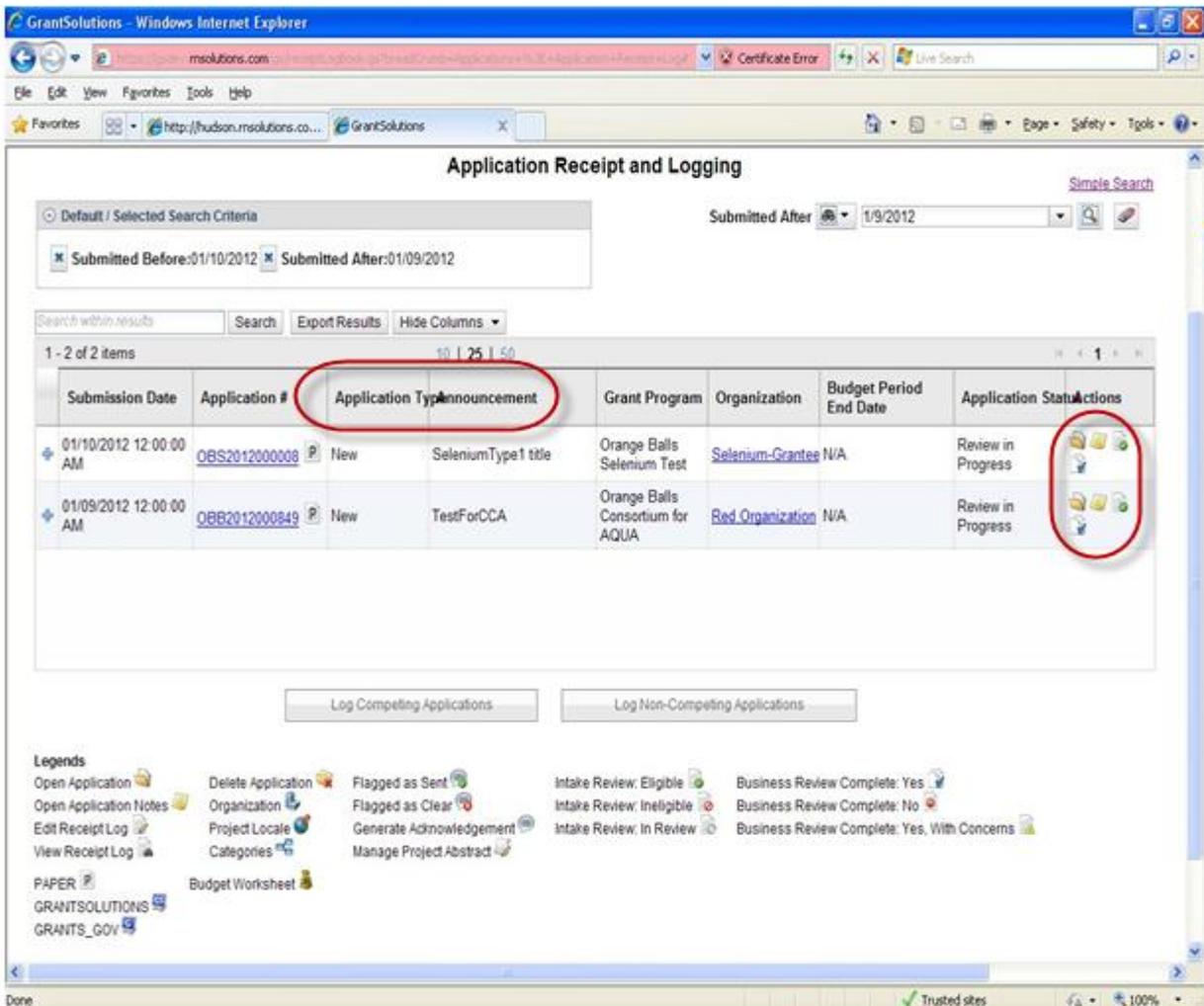


Figure 1- 14 – Overwritten Labels

The images on the following pages illustrate improved label placement, the new message balloon, and relocation of the Hide Columns function.

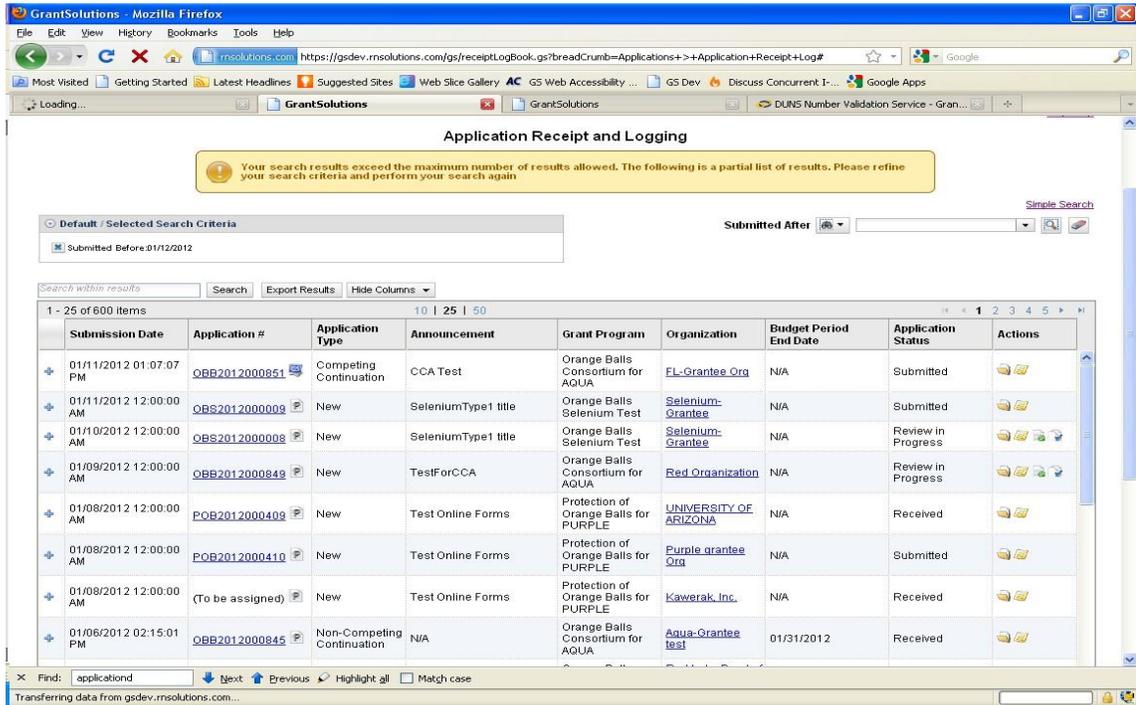


Figure 1- 15 – Correct Labels Messaging

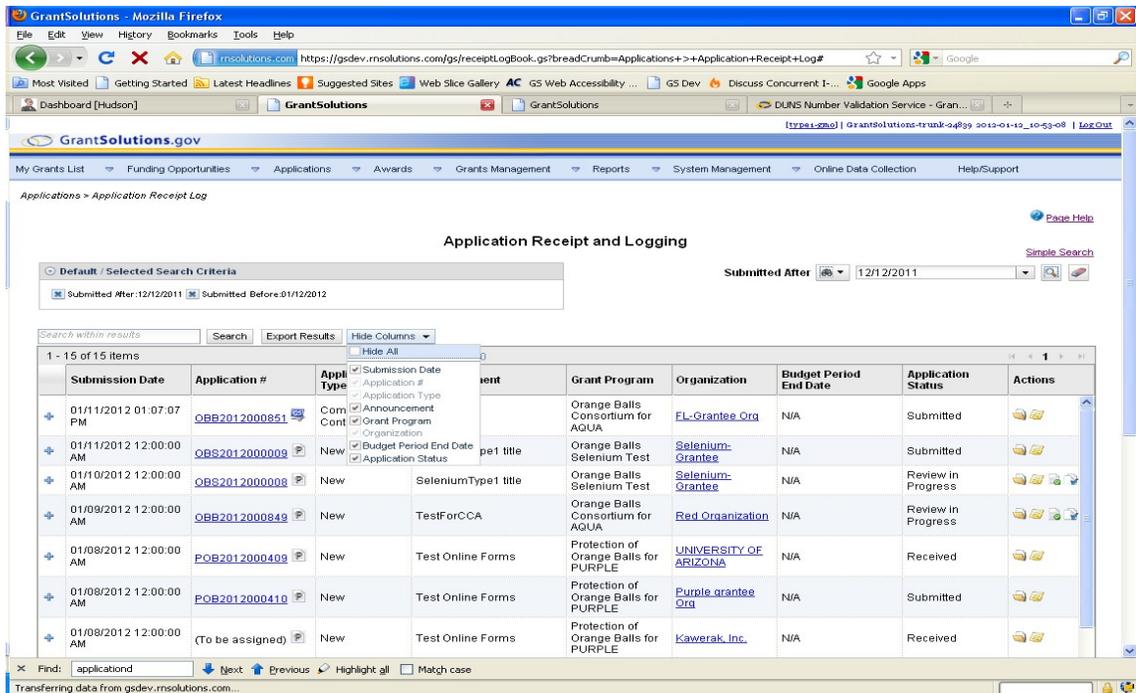


Figure 1- 16 – Correct Labels Hide Columns

Payment Sub Account for DOS

This new feature only affects the Department of State.

The DOS Edit NGA screen now includes a Payment Subaccount field in the Accounting and Appropriation Data section. This field is editable when the user adds a new Obligation Document Number. The user can either leave the default Payment Subaccount value (the Award number without the dashes) or type in a new value. The Payment Subaccount data is included when the Obligation is sent through the Accounting Interface to GFMS. GFMS forwards the Payment Subaccount value to PMS for Awards where the PMS flag is turned on. *Please note: the Payment Subaccount value becomes read only for subsequent Amendments, so be careful when overriding the default.*

*21e. Accounting and Appropriation Data

Financial Account	Obligation #	Currency Code	Amount	Payment	PMS Issue Date	Payment Subaccount	Action
ABC123	XYZ123	USD	0.00	200000.0	12/16/2009	SABCD12GR1001	
--please select a financial account--		USD	0	0		SABCD12GR1001	

Payment Subaccount is **read only** for an **existing** Obligation Document Number

Payment Subaccount is **editable** for a **new** Obligation Document Number

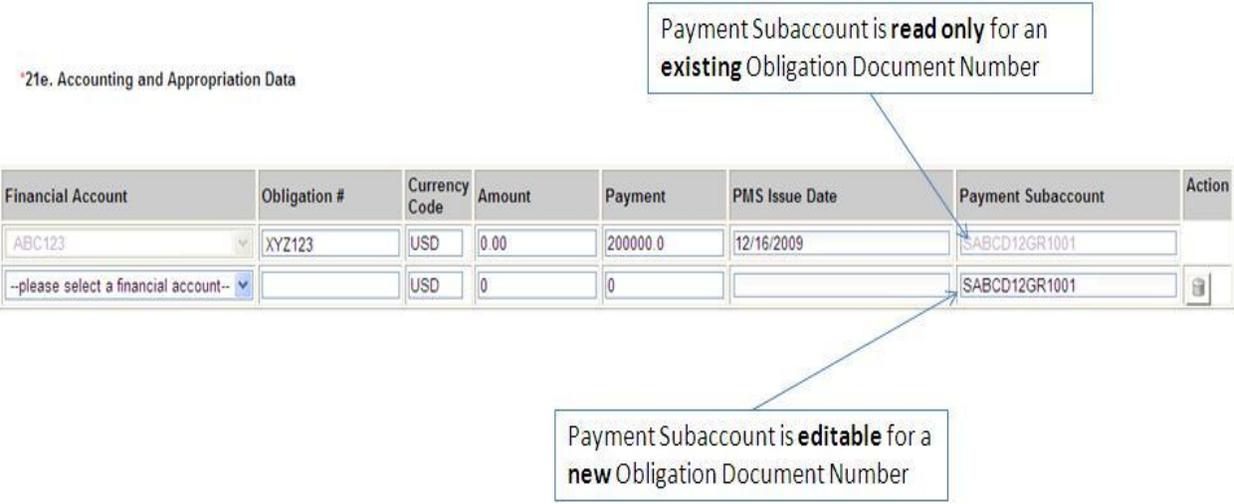


Figure 1- 17 – Payment Subaccount

Mandatory Grants Functionality

The following enhancements affect only the GrantSolutions Mandatory Grants processing features.

- ODN fiscal year field was added in the Multiple Award Edit screen.
- A new field "Future Account Retrieval Years limit" is added at the grant program level which will enable the user to use a financial account of future years with a Document number of current fiscal year. For discretionary this field is set to zero.
- The user can edit an existing Grantee address or create a new address.
- The Next Quarter Estimate values obtained via OLDC web service are populated in the entitlement computation sheet.
- Batch Validation added to check for vendor, grantee address and point of contact.
- Award Amount determination will display the recommendation sent via OLDC.