CGI Advantage® 4

Grant Lifecycle Management User Guide

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Grant Lifecycle Management Overview

A federal grant is an award of financial assistance from a Federal agency to a recipient to carry out a public purpose of support or stimulation authorized by a law of the United States. Grants are not Federal assistance or loans to individuals. Grants can also be provided by foundations, corporations, small business and individuals. Most grants are made to fund a specific project (for example, increased security at an airport) and require some level of reporting. The process involves an applicant submitting a proposal to a potential funder, either on the applicant's own initiative or in response to a Request for Proposals from the funder and then tracking the details associated with a potential award.

Departments that pursue additional grant funds for projects due to changes in state/local funding structures and the ever-present need for additional funding will benefit from a central repository to track these opportunities. The Grant Lifecycle Management subsystem allows users to view the global lifecycle of a grant from the opportunity identification to the audit/close-out stages in order to analyze funding streams that are in the pipeline. In turn, the Grant Lifecycle Management subsystem functions as a tool for Grant Managers, Project Managers, and Fiscal Officers to manage and track funds throughout the grant lifecycle.

Benefits of the Grant Lifecycle Management subsystem are as follows:

- Provides a global view of grant opportunities, potential grant revenue, and grants status
- Facilitates grant opportunity, application, award, and incremental amendment tracking at all organizational levels thereby improving visibility into grant opportunities and forecasting resource needs
- Identify patterns for lost grant dollars or failures to win competitive awards

The Grant Lifecycle Management subsystem differs from the Cost Accounting (CA) subsystem in that the CA subsystem tracks the grant ***AFTER*** the award of grant funds and the grantee (entity awarded the grant) is spending money from the grant. However, grant funds and any applicable grantor requirements must be continuously monitored to ensure that departments will not be forced to return awarded funds that have not been spent at the end of the eligible grant period. Therefore, Advantage Financial via the Grant Lifecycle Management subsystem will now have a method of tracking:

- Information prior to grant award
- Other details during/after the award
- Amendment process
- Audit/Close-Out

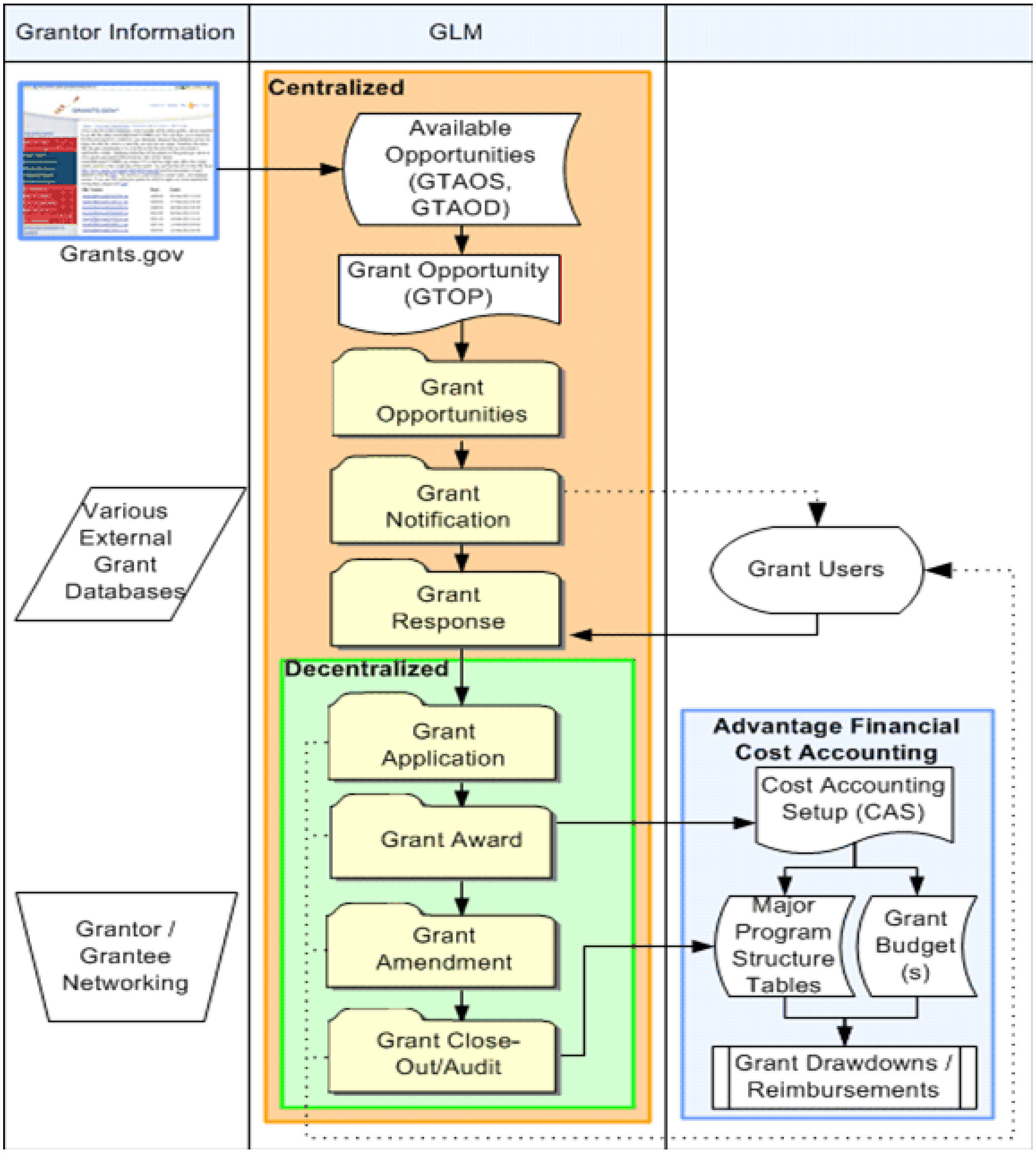
The Grant Lifecycle Management subsystem can be used separately or in conjunction with Cost Accounting. For more information, refer to the *CGI Advantage - Cost Accounting User Guide*.

Grant Lifecycle Management Overview includes the following tabs:

- Grant Lifecycle
- Common Features

Grant Lifecycle

The lifecycle of a grant spans from identifying the opportunity through grant closing. Below is an overview of the lifecycle.



› Identify and Track Relevant Grant Opportunities

Potential grantees can search multiple places to find grant opportunities. These include:

- Grants.gov website (www.grants.gov)

- GTAOD and GTAOS
- Various grantor databases
- Grantor networking

Once a relevant grant opportunity has been identified it is entered into the Grant Lifecycle Management subsystem. This provides a central repository for grant managers to view details about pertinent grant opportunities which they could eventually apply for on behalf of their department or unit. The opportunity can be entered via the Grant Opportunity (GTOP) transaction or the Grant Opportunity Status Folder (GTOPSF), based on user authorization. You can also enter new opportunity information directly on the Grant Application (GTAP) transaction. Refer to the "Grant Opportunity Status Folder" topic and the "Grant Application Status Folder" topic in this user guide for more information.

Opportunities from the Grants.gov website can also be automatically loaded into the Available Opportunity Detail (GTAOD) and Available Opportunity Summary (GTAOS) pages via the Update Grant Opportunity batch job. You can then create Grant Opportunity transactions directly from these tables. For more information on this functionality, refer to the “Grants.gov Opportunities” topic in this user guide.

› Notify Others About Grant Opportunity

Once the opportunities are identified, Grant Managers can automatically notify potential grant applicants (that is, Grant Users) via e-mail about that opportunity that has been entered in Advantage. You can indicate the users that you want notified on the following pages (based on user authorization):

- Grant Opportunity (GTOP) transaction
- Grant Opportunity Revision (GTOPR) transaction
- Grant Notification Status Folder (GTNTSF)

You can notify someone that does not have an Advantage User ID. For more information refer to the following topics in this user guide: "Grant Opportunity Status Folder" and "Grant Notification Status Folder".

› Respond to Grant Notifications

Grant Users that were notified about the opportunity, via e-mail or verbally, can enter in Advantage the decision on whether or not they plan to apply for a specific opportunity. If a Grant User chooses not to apply for an opportunity, then the reason for not applying is also captured. The Grant Lifecycle Management subsystem also maintains a summary of the responses for a particular opportunity (for example, number notified, number that plan to apply, and so forth). This information can be entered via the Grant Response (GTRE) transaction or the Grant Response Status Folder (GTRESF), based on user authorization. For more information refer to the "Grant Response Status Folder" topic in this user guide.

› Manage Grant Application

Applying for grants is an intricate process which requires multiple steps and various details. Grant Users typically spend significant time coordinating and collaborating information throughout the application process. This includes tracking the status of the grant in the pre-application and application phases, documenting board approvals, and many deadline dates within the grant application process. Grant Users can manage the process of applying for a specific opportunity via the Grant Application (GTAP) transaction or Grant Application Status Folder (GTAPSF), based on user authorization. For more information, refer to the "Grant Application Status Folder" topic in this user guide.

Note: Users can go directly to the Grant Application, skipping the previous steps in the grant lifecycle.

- Track Grant Award

  There are many details which must be recorded once the grantee has been awarded the grant. The Grant Award (GTAW) transaction and Grant Award Status Folder (GTAWSF) page allow for the recording of the grant award information including the status of the award acceptance approval process and miscellaneous award requirements. For more information refer to the "Grant Award Status Folder" topic in this user guide.

- Program Management

  Once the grant is awarded, Project Managers might desire to track additional details about how the grant will be recorded within Advantage. In turn, Project Managers can establish high level Cost Accounting COA structure data and matching percentages within the Grant Award Status Folder (GTAWSF). In addition, the system can trigger a Cost Accounting Setup (CAS) transaction that acts as the integration point with the Cost Accounting subsystem.

- ARRA Compliance and Tracking

  In February 2009, the American Recovery and Reinvestment Act of 2009 (ARRA), commonly referred to as the 'Recovery Act', was signed into law. This legislation was a critical component of the government's effort to rebuild the American economy and invest in the nation's critical infrastructure. Included in the funding act were increased requirements on the transparency and accountability of how these funds were spent.

  ARRA Reporting occurs on a quarterly basis, within 21 days of the end of each quarter. The award recipient must consolidate information related to the award and transmit this information to the Office of Management and Budget (OMB). CGI Advantage can be used to capture this information and send to the OMB office. OMB will then consolidate all of the data from all recipients and present this information as the national results of the Recovery Act. Refer to the "ARRA Compliance Tracking and Reporting" topic in this user guide for more information.

- Manage Grant Amendments

  The grantor might request/permit an adjustment be made to the award which must be tracked separately because they occur after the award is accepted. Grant Managers can track these changes to the original grant award, award amount or grant period via amendments. The system distinctly tracks the original award along with any amendments. These types of changes to a Grant Award are tracked via the Grant Amendment (GTAM) transaction and the Grant Amendment Status Folder (GTAMSF), based on user authorization. Refer to the "Grant Amendment Status Folder" topic for more information.

- Manage Grant Close-Out/Audits

The auditing of a grant can take a significant amount of time while requiring multiple levels of approval. The Grant Manager can record audit related information, audit dates and audit approvers in the Grant Lifecycle Management subsystem. In addition to tracking the grant audit process, the Grant Managers can mark the grant closed via the Grant Close-out/Audit (GTCO) transaction or the Grant Close-out/Audit Status Folder (GTCOSF) page. For more information refer to the "Grant Close-Out / Audit Status Folder" topic in this user guide.

Common Features

The Grant Lifecycle Management subsystem shares many common features as well as incorporating many standard Advantage Financial features throughout. The purpose of this topic is to outline those common features to simplify an understanding of how the Grant Lifecycle Management subsystem functions.

Common Features includes the following topics:

- Statuses
- Status Folders vs. Transactions
- Status Dates
- Information Needs
- Transactions Tab
- Attachments Tab

Statuses

The term Status refers to the different stages of the grant lifecycle (that is, Opportunity, Notification, Response, Application, Award, Amendment, or Close-out / Audit) whereas the term folder is used to identify the central repository of each status record's information. Once a user opens a Status Folder, they can view multiple entries within that status or search on a specific entry thereby opening up the "folder" (for example, a particular application record). The user is within that particular grant's "folder" upon selecting a particular record. At this point, the user may maneuver through each of the statuses, focusing on that grant, using the links at the bottom the page. For example, the user may click on the **Award** link at the bottom of the Application Status Folder which will open up the award associated with that application record.

Status Folders versus Transactions

The Grant Lifecycle Management subsystem allows for centralized and decentralized management of tracking grants via folders and transactions.

Status Folders – Status Folders (for example, Grant Application Status Folder) represent the centralized management approach by allowing for data to be entered directly into tables. This is beneficial for departments that have centralized grant management functions where a very limited number of users have rights to update the "Status Folder" pages. Regardless of whether these functions are centralized or decentralized, all grant users should be permitted to view the Status Folders because this is the central repository for the most recent data.

Transactions – Grant transactions (for example, Grant Application transaction) represent the decentralized management approach to update the Grant Lifecycle Management subsystem. The transactions act as a data-entry facilitation tool which allows departments with decentralized grant management functions to maintain a level of internal control. This is accomplished on transactions by tracking the user who created the transaction and via workflow (if desired) such that data is not added/modified to the applicable repository table (Status Folder) until the transaction has been reviewed and approved by an authorized user. Departments with centralized grant management functions can also make use of grant transactions.

Status Dates

All statuses from Grant Application and beyond have configurable dates that can be associated to a particular status record. The purpose of these dates is to track key events associated with the status record. For example, a Grant Manager entering in a new application record could desire that the system track the Application Due Date, Internal Application Approval Date and/or Application Submission Date. These date records are multi-functional in the sense that they:

- Record a due date and a date the task was completed
- Permit the entry of approver names and comments for those individuals reviewing the status record
    - These approvals/comments are for reporting/information purposes and are not associated with workflow approvals
- Trigger alerts in the form of e-mail or MS Outlook calendar items which act as reminders for the Grant Users to take some form of action pertaining to the particular grant
    - The Status Date record can be associated with multiple Grant Users alerting them of an impending task.

These dates are established on the Grant Date Definition (GRNTDEF) page and can be setup to default onto the status record based upon the user’s department as established in security. The Grant Statuses and associated Information Needs records which store Status Dates are:

- Application
- Award
- Amendment
- Close-Out
- Partnering Organization
- Reporting
- Program Management

A batch process, called Generate Alerts, identifies the status dates established within the Grant Lifecycle Management subsystem which will trigger alerts to Grant Users of an impending or expired due date. The goal of this process is to help grant managers reduce the risk of losing funding as a result of missed grant requirements by sending email and calendar reminders to the Grant Users (that is, grant managers, applicants, and board members). This is discussed further in the Generate Alerts run sheet in the *CGI Advantage Grant Lifecycle Management Run Sheets*.

Information Needs

The Grant Lifecycle Management subsystem is designed to track details associated with the many stages of the grant lifecycle. There are some pieces of data, called Information Needs, which provide more details about a particular status. In some instances the same set of Information Needs for a particular grant is shared across multiple statuses (for example, Grant Legislative Bodies). The Information Needs data recorded throughout the various stages of the Grant Lifecycle Management subsystem are:

- **Partnering Organization** – Partnering Organization records track applications that are submitted with other community-based organizations or when any collaboration needs to take place between two or more entities. This information is solely associated with an application record.
- **Legislative Body** – Legislative Body records track applications that are submitted on behalf of the various governmental branches/jurisdictions. A particular legislative body record associated with an application is also shared with an award and amendment record because this information does not change throughout the grant lifecycle.
- **Funding Allocations** – Funding Allocation records track the requested, awarded and amended amounts associated with a specific governmental branches/jurisdictions or Grant Service Planning Area (SPA). A particular funding allocation record associated with an application is also shared with an award and amendment record because the key information (for example, SPA) does not change throughout the grant lifecycle whereas a user can solely input the value associated with that status. For example, a user can only update the awarded amount when accessing a Funding Allocation record from the Award Status Folder.
- **Program Management** – Facilitates the establishment of high level Cost Accounting COA structure data and matching percentages within an award of the Grants Tracking subsystem. A Project Manager can then trigger a draft Cost Accounting Setup (CAS) transaction which is used to establish the COA data in the Cost Accounting subsystem.
- **Reporting Schedules** - Reminds the Project Manager of when information should be reported internally or back to the grantor. The same set of reporting schedules are shared between the award and amendment records.

Transactions Tab

Each Status Folder has a Transactions tab which displays any transaction that created or modified the particular status. For example, a Grant User can view and open the Grant Application (GTAP) transaction which created the Grant Application Status Folder record by selecting the link on the Transactions tab.

Attachments Tab

Each Status Folder has an Attachments tab which displays a list of attached files associated with that particular status. The Attachments tab displays the **Transaction ID** for files that are attached to Grant transactions.

Grant Users can upload, download, and delete attachments by clicking the **Attachments** link on the Attachments tab within a particular Grant Status. Grant Users cannot modify files on this table that are attached to a Grant transaction; instead, they must access the Grant transaction to modify the attachment.

Common Terminology

This topic contains an alphabetical list of terms that are common in the Grant Lifecycle Management subsystem, and a definition for each one.

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z |

- ARRA

  American Recovery and Reinvestment Act of 2009 (also called "the Recovery Act" and "Stimulus bill"). This was the package of legislation passed by the US Congress and signed by the Obama Administration in February 2009 to release additional funds to aid in economic recovery.

- D&B

  Dun & Bradstreet – the company that maintains and assigns DUNS numbers.

- DUNS Number

  Data Universal Numbering System number is a unique nine-digit identification number provided by Dun & Bradstreet (D&B).

- Grant

  A grant is a promise of money from one entity (the "grantor" or "funding agency") to a Recipient.

- Grant Applicant

  The **Grant Applicant** is the individual or organizational unit that applies and potentially receives grant funds from an external source, that is, federal, state, or local government entities or agencies, or internal funds.

- Grant ID

  The **Grant ID** field is the unique identifier for the application and any associated status (for example, award, amendment, and close-out). The **Grant ID** is assigned/identified at the time of application creation and is consistent throughout the lifecycle of the specific grant. The **Grant ID** also distinguishes the multiple applications that may occur against a single opportunity.

- Grant Manager

  The **Grant Manager** is responsible for coordinating grant applications and tracking grants through the grant lifecycle.

- Grant Opportunity ID

  The **Grant Opportunity ID** is the unique identifier to track a specific RFP or funding opportunity. The **Grant Opportunity ID** can be associated with zero or many applications.

- Grant Status

  The **Grant Status** represents a particular stage of the grant lifecycle (that is, Opportunity, Notification, Response, Application, Award, Amendment, or Close-out / Audit).

- Grantor

  The **Grantor** is an agency or department that awards grant funds to individuals and entities, either as the original grantor or as a pass-through entity.

- OMB

  Office of Management and Budget. The executive organization that is responsible for collecting ARRA information.

- Project Manager

  The **Project Manager** is an individual or organizational unit that oversees the projects funded by the awarded Grant.

- Recipient

  The state, county, city, or university that receives award funds from the Federal government. The “recipient” has primary reporting responsibility for the award.

- Sub-Recipient

  An entity who will receive funds from the award, paid by the Recipient. Non-Profits, Contractors, and other Governments could be sub-recipients. In addition, an Advantage Financial site could be both a Recipient as well as a Sub-Recipient of grants funds.

Grants.gov Opportunities

The Grants.gov website (www.grants.gov) was established as a Governmental resource named E-Grants Initiative to improve government services to the public. The website contains comprehensive information about all Federal Grant Programs. The site offers services to search and apply for Grant Opportunities. The opportunities on Grants.gov can be added to CGI Advantage in one of two ways:

- You can manually enter the opportunities in Advantage using the Grant Opportunity Status Folder (GTOPSF) or the Grant Opportunity (GTOP) and Grant Application (GTAP) transactions.
- Opportunities from Grants.gov can also be automatically loaded into the Available Opportunity Detail (GTAOD) and Available Opportunity Summary (GTAOS) pages via the Update Grant Opportunity batch job. You can then manually create Grant Opportunity transactions directly from these pages. This topic explains this approach.

This topic includes the following sub-topics:

- Update Grant Opportunity Batch Process
- Available Opportunity Detail (GTAOD)
- Available Opportunity Summary (GTAOS)
- Searching for Opportunities on GTAOD and GTAOS
- Creating Opportunity Transactions from GTAOD and GTAOS
- Eligibility Category
- Funding Activity Category
- Funding Instrument Type

Update Grant Opportunity Batch Process

The details of funding opportunities are available in different repositories for applicants to pursue. www.grants.gov is a repository for federal funding opportunities offering capabilities for applicants to connect and download the daily extract of opportunities. The Update Grant Opportunity process retrieves data from the daily extracts on www.grants.gov to Available Opportunity Detail (GTAOD) and Available Opportunity Summary (GTAOS) pages in Advantage, eliminating the need to manually enter the grant opportunity information in Advantage. These pages provide search capabilities and the ability to automatically generate Grant Opportunity (GTOP) transactions from the selected Available Opportunity record. Refer to the Update Grant Opportunity run sheet in the *CGI Advantage Grant Lifecycle Management Run Sheets* guide for more information.

Available Opportunity Detail (GTAOD)

The Available Opportunity Detail (GTAOD) page displays data that is downloaded from the Grants.gov website. The Update Grant Opportunity job uses the data that is stored in the XML extract files located at https://prod-grants-gov-chatbot.s3.amazonaws.com/extracts to create records in the Available Opportunity Detail table. The process runs daily so that it will update the same grant opportunities that can be found on the Grants.gov website. Refer to the *CGI Advantage Grant Lifecycle Management Run Sheets* guide for more information on the Update Grant Opportunity job.

Numerous fields are provided on the search window, which allow you to narrow the results on this page. The four key search fields are: **Include Forecasted Opportunities**, **Include Open Opportunities**, **Include Closed Opportunities,** and **Include Archived Opportunities**. Please refer to the "Searching for Opportunities on GTAOD and GTOAS" topic for more information.

The **Create Grant Opportunity Transaction** link creates a grant opportunity transaction for the record selected on this page. Refer to the "Creating Opportunity Transactions from GTAOD and GTAOS" topic for more information.

Available Opportunity Summary (GTAOS)

The Available Opportunity Summary (GTAOS) page provides a summarized version of the data available on the Available Opportunity Detail (GTAOD) page. You can transition to the GTAOD page by selecting a record on GTAOS and then clicking the **Available Opportunity Detail Table** link. You can return to the GTAOS page by selecting the **Back** link on the GTAOD page.

Numerous fields are provided on this page, which allow you to narrow your results. The four key search fields are: **Include Forecasted Opportunities**, **Include Open Opportunities**, **Include Closed Opportunities,** and **Include Archived Opportunities**. Please refer to the "Searching for Opportunities on GTAOD and GTOAS" topic for more information. The search is performed on the GTAOD page and the results are displayed in the grid tab of GTAOS.

The **Create Grant Opportunity Transaction** link creates Grant Opportunity (GTOP) transaction(s) for the record(s) selected on this table. Refer to the "Creating Opportunity Transactions from GTAOD and GTAOS" topic for more information.

Searching for Opportunities on GTAOD and GTAOS

You can search for records on the Available Opportunity Detail (GTAOD) page by selecting the **Search** link and then entering your search criteria. You can search for records on the Available Opportunity Summary (GTAOS) page by entering your search criteria in the search fields at the top of the page.

Numerous search fields are provided on these pages. The four key search fields are: **Include Forecasted Opportunities**, **Include Open Opportunities**, **Include Closed Opportunities,** and **Include Archived Opportunities**. When Include **Forecasted Opportunities** is *Yes*, forecasted opportunities are searched for and displayed. When **Include Open Opportunities** is *Yes*, open opportunities are searched for and displayed. When **Include Closed Opportunities** is *Yes*, closed opportunities are searched for and displayed. When **Include Archived Opportunities** is *Yes*, archived records are searched for and displayed. If *Yes* is selected for all four options, then all four categories are included in the search. If *No* is selected for all four options then no records are searched for or displayed.

- **Forecasted Opportunity:** This is an Opportunity record where the Forecast field (a field not displayed in GTAOD) is checked in the Available Opportunity Detail table.
- **Open Opportunity:** This is an Opportunity record where the Application Due Date and Archive Date are greater than or equal to the date specified for the Appl. System Date (APPL_SYS_DT) parameter on APPCTRL. This includes a record with a blank Archive Date, Application Due Date, or Post Date.
- **Closed Opportunity:** This is an Opportunity record where the Applications Due Date is less than the date specified for the Appl. System Date (APPL_SYS_DT) parameter on APPCTRL. This includes a record with a blank Application Due Date.

- **Archived Opportunity:** This is an Opportunity record where the Archived Date is less than the date specified for the Appl. System Date (APPL_SYS_DT) parameter on APPCTRL. This includes a record with a blank Archive Date.

The **Eligibility Category**, **Funding Instrument Type,** and **Funding Activity Category** search fields can be specified either through the respective pick list or by manually entering valid values. You can also select multiple code values from the pick list window by checking the box next to each desired code. After selecting **OK**, the codes are listed in the search field, separated by commas. You can also manually enter multiple codes by entering the valid codes separated by commas. On the GTAOD page you can also enter multiple codes separated by commas in the **Assistance Listing Number** search field.

Creating Opportunity Transactions from GTAOD and GTAOS

On the Available Opportunity Detail (GTAOD) and Available Opportunity Summary (GTAOS) pages, the **Create Grant Opportunity Transaction** link creates a Grant Opportunity (GTOP) transaction for the record selected on the page. Multiple records can be selected on the GTAOS table, and a GTOP transaction is created for each record selected. The following rules must be met in order for the GTOP transaction(s) to be created:

- The **Opportunity Number** field must not be blank.
- When multiple records are selected on GTAOS, the records selected cannot have the same **Opportunity Number**.
- A Grant Opportunity transaction must <u>not</u> already exist for the specified **Opportunity Number**.
- A Transaction Code must be defined for the DFLT_OPPORTUNITY_DOC_CODE parameter on the Application Parameter (APPCTRL) table.
  - This Transaction Code must be set up on the Transaction Control (DCTRL) table with a **Transaction Type** of *GT* and a **Transaction Sub-Type** of *GTOP*. If valid, this Transaction Code is used to create the transaction.
  - This Transaction Code must have an entry on the Auto Numbering (ADNT) table using the following values:
    - Department = Home Department of the User based upon Security setup
    - FY = Fiscal Year calculated based on the date specified for the Appl. System Date (APPL_SYS_DT) parameter on APPCTRL along with the Calendar Date (CLDT) table
    - Prefix = Utilize the OPPORTUNITY_DOC_PREFIX from APPCTRL
- The selected record must not be a forecasted opportunity. If it is a forecasted opportunity, then an error is issued and the Grant Opportunity transaction is not created.

After the Grant Opportunity transaction(s) are successfully created, the fields in the Grant Opportunity Transaction Information tab on GTAOD are updated with details of the transaction. The Transaction ID and Transaction Phase are updated in the grid on GTAOD, and a link is provided to the transaction.

If the OPPORTUNITY_DOC_SUBMIT parameter is set to *True* on the APPCTRL table, Advantage will attempt to validate and submit the transaction to Final. The Transaction Phase is updated on the GTAOD page based on whether the transaction was submitted to Final or the transaction was rejected due to errors. If the referenced Grant Opportunity transaction is discarded, then the reference to the transaction is removed from the GTAOD page.

Refer to the "Grant Opportunity (GTOP)" topic for more information on Grant Opportunity transactions.

Eligibility Category

The Eligibility Category pick list page allows you to search the available Eligibility Category Codes. You can search on this page by manually entering search criteria in the **Code** and **Description** fields. You can enter multiple codes by entering the valid codes separated by commas. You can also locate the desired Code(s) by using the **Next** and **Last** links to navigate through the records on the grid.

Select the check box next to the Code(s) that you want to include in your search and select **OK**.

- If you transitioned to the pick list page from the Available Opportunity Detail (GTAOD) table, then the **OK** link transitions you back to the search window for GTAOD and populates the **Eligibility Category** search field with the value(s) that you selected on the pick list page.
- If you transitioned to the pick list page from the Available Opportunity Summary (GTAOS) table, then the **OK** link transitions you back to the GTAOS table and populates the **Eligibility Category** field with the value(s) that you selected on the pick list page.

Funding Activity Category

The Funding Activity Category pick list page allows you to search the available Funding Activity Category Codes. You can search on this page by manually entering search criteria in the **Code** and **Description** fields. You can enter multiple codes by entering the valid codes separated by commas. You can also locate the desired Code(s) by using the **Next** and **Last** links to navigate through the records on the grid.

Select the check box next to the Code(s) that you want to include in your search and select **OK.**

- If you transitioned to the pick list page from the Available Opportunity Detail (GTAOD) table, then the **OK** link transitions you back to the search window for GTAOD and populates the **Funding Activity Category** search field with the value(s) that you selected on the pick list page.
- If you transitioned to the pick list page from the Available Opportunity Summary (GTAOS) table, then the **OK** link transitions you back to the GTAOS table and populates the **Funding Activity Category** field with the value(s) that you selected on the pick list page.

Funding Instrument Type

The Funding Instrument Type pick list page allows you to search the available Funding Instrument Type Codes. You can search on this page by manually entering search criteria in the **Code** and **Description** fields. You can enter multiple codes by entering the valid codes separated by commas. You can also locate the desired Code(s) by using the **Next** and **Last** links to navigate through the records on the grid.

Select the check box next to the Code(s) that you want to include in your search and select **OK**.

- If you transitioned to the pick list page from the Available Opportunity Detail (GTAOD) table, then the **OK** link transitions you back to the search window for GTAOD and populates the **Funding Instrument Type** search field with the value(s) that you selected on the pick list page.

- If you transitioned to the pick list page from the Available Opportunity Summary (GTAOS) table, then the **OK** link transitions you back to the GTAOS table and populates the **Funding Instrument Type** field with the value(s) that you selected on the pick list page.

Grant Status Folders

The Grant Status Folders represent the central repository for the Grant Lifecycle Management subsystem. All of the latest information is stored on these tables and is used for reporting.

Grant Status Folders includes the following tabs:

- Grant Opportunity Status Folder
- Grant Notification Status Folder
- Grant Response Status Folder
- Grant Application Status Folder
- Grant Award Status Folder
- Grant Amendment Status Folder
- Grant Close-Out / Audit Status Folder

Grant Opportunity Status Folder

Governments can search multiple places to find grant opportunities. These include:

- Grants.gov website (www.grants.gov)
- GTAOD and GTAOS pages (which load the Grants.gov opportunities into Advantage Financial via a batch job)
- Various grantor databases
- Grantor networking

Once a relevant grant opportunity has been identified, it is entered into the Grant Lifecycle Management subsystem. This provides a central repository for grant managers to view details about pertinent grant opportunities which they could eventually apply for on behalf of their department or unit. The opportunity can be entered via the Grant Opportunity (GTOP) transaction or the Grant Opportunity Status Folder (GTOPSF), based on user authorization. Grant Opportunity Status Folder records updated via a Grant Opportunity (GTOP) transaction can be updated directly on the Status Folder or via a Grant Opportunity Revision (GTOPR) Transaction. The system will issue an error if you attempt to update fields directly on the Opportunity Status Folder if a revision transaction is in *Draft* or *Pending* status. This edit prevents users from updating data on the Status Folder which will subsequently be overridden once the revision transaction is submitted to *Final*.

The Grant Opportunity Status Folder (GTOPSF) contains the following tabs:

- Grant Opportunity
- Transactions
- Attachments

Tasks

The "Create Grant Opportunity" topic contains instructions on creating a grant opportunity using the Grant Opportunity Status Folder (GTOPSF).

Grant Opportunity

The Grant Opportunity tab on the Grant Opportunity Status Folder (GTOPSF) captures information regarding the Grant Opportunity. Grant Opportunity Revision transactions must use an existing **Grant Opportunity ID** value, a new value cannot be created and an existing value cannot be changed or deleted.

› Required/Conditionally Required Fields

The following fields are required:

- Department
- Grant Opportunity ID
- Grant Program Name
- Total Available Funding
- Maximum Grant Award
- Minimum Grant Award
- Funding Agency
- Grant Type
- Funding Type
- Resolution Required
- Pre-Application Required
- Funding Instrument Type 1

The **Funding Agency** field is conditionally required based on the setting of the **GTOP_FUND_AGY_CTL** parameter on the Application Parameter (APPCTRL) table and the value in the **Grants Opportunity Source Detail** field.

Note: If this is an ARRA award opportunity, it is recommended that a recognizable value be entered in the **Grant Category** field. Some ARRA awards have additional application information or faster timelines. Communicating this information to award applicants is important.

Grant Notification Status Folder

Once the opportunities are identified, Grant Managers can automatically notify potential Grant Users via e-mail about that opportunity that has been entered in Advantage. The system can notify someone that does not have an Advantage User ID. You can indicate the users that you want notified on the following pages (based on user authorization):

- Grant Opportunity (GTOP) transaction
- Grant Opportunity Revision (GTOPR) transaction
- Grant Notification Status Folder (GTNTSF)

The Grant Notification Status Folder (GTNTSF) contains the following tabs:

- Grant Notification
- Alerted Users
- Transactions
- Attachments

Tasks

The "Notify Others about Grant Opportunity" section contains instructions on notifying potential grant applicants about an opportunity using the Grant Notification Status Folder (GTNTSF).

Grant Notification

The Grant Notification tab on the Grant Notification Status Folder (GTNTSF) allows you to specify the Grant Opportunity ID (required) and Alert User Group ID (optional). You can add multiple records/transactions for the same Grant Opportunity ID with a different Alert User Group ID. However, only one Alert User Group ID is allowed for each Grant Notification record.

› Field Information

You can change the value selected in the **Alert User Group ID** field. A pick list is provided to the Grant User Group Template (GRNTTMPL) table. After you select the new value, you must click the **Load Alert Grant User Group Template** action from the tab-level menu. All Grant Users associated with the new template are loaded to the Alerted Users tab. If any Grant User from the previous template has responded, then an error is issued and the new template is not loaded (or any grant users associated with the template).

› Required/Conditionally Required Fields

The following field is required:

- Grant Opportunity ID

If a value is specified in the **Alert User Group ID** field, then at least one Grant User record must exist on the Alerted Users tab.

Alerted Users

This tab lists the Grant Users that should receive a notification regarding the Grant Opportunity specified on the Grant Notification tab.

› Field Information

- You can modify the Name and Email fields for existing Grant Users on this table; however, the changes are not replicated to the Grant User (GRNTUSER) table.
- You can delete users from the grid if the user has not already entered a response on the Grant Response Status Folder. The Grant User is not deleted from the Grant User Group Template (GRNTTMPL) table.
- You can manually add new users to the grid; however, the new user is not added to the Grant User Group Template (GRNTTMPL) table. You can either select a user from the Grant User pick list or you can manually enter the information (for example, Name, Department, Unit, and Email) without populating the Grant User field. If a user is selected from the Grant User pick list, then the Name, Department, Unit and Email are inferred from the Grant User table.
- You can select the message you want sent to the user from the Grant Message ID pick list field. If this field is left blank a default message is sent.
- Set the Notify? field to *Yes* for all users that you want to receive a notification about the Grant Opportunity. When a new Alert Grant User Group Template is loaded from the Grant Notification tab, all Notify? fields are set to *Yes*. If you click the **Unselect All to Notify** tab-level action, all Notify? fields are set to *No*. If you click the **Select All to Notify** tab-level action, all Notify? fields are selected for you. Select the **Notify** action to initiate the Notification batch process.
- The system only notifies the Grant Users that have the Notify? field set to *Yes*. The potential Grant Applicants that are notified receive an email notification with a link to access the Grant Opportunity directly within the system and a .PDF file attachment of the Grant Opportunity.
- On completion of the Notify Grant Opportunity batch process, an Alert is sent to the person who triggered the notification and the current Application Date is populated in the Notification Sent field for each successfully notified potential applicant.

› Response Due Date Calculation

Response Due Date = Application Control Date + Grant Response Days (specified on the SOPT table)

› Required/Conditionally Required Fields

The following fields are required:

- Response Due Date

Grant Response Status Folder

Grant Users that were notified about the opportunity, via e-mail or verbally, can enter in Advantage the decision on whether or not they plan to apply for a specific opportunity. If a Grant User chooses not to apply for an opportunity, then the reason for not applying is also captured. The Grant Lifecycle Management subsystem also maintains a summary of the responses for a particular opportunity (for example, number notified, number that plan to apply, and so forth). This information can be entered via the Grant Response (GTRE) transaction or the Grant Response Status Folder (GTRESF), based on user authorization. Lastly, new response entries can be added directly to the Grant Response Status Folder (GTRESF) for those individuals that were not notified by the system yet want to record a response (for example, individual heard about the opportunity via word-of-mouth).

The Grant Response Status Folder (GTRESF) contains the following tabs:

- Grant Response
- Transactions
- Attachments

Tasks

The "Respond to Grant Notification" section contains instructions on responding to a grant opportunity using the Grant Response Status Folder (GTRESF).

Grant Response

The Grant Response tab on the Grant Response Status Folder (GTRESF) provides the list of users that were notified of a particular Grant Opportunity and allows their response to be recorded regarding their decision of whether or not to apply. You must first search for and select a valid Grant Opportunity. One you have selected a Grant Opportunity, you can then record the Grant User's response.

› Required/Conditionally Required Fields

The following fields are required:

- Department
- Decision

The **Decision** field allows the selected Grant User to record his/her decision regarding whether to apply or not to apply for the Grant Opportunity. If *Not Apply* is selected, then the reason for not applying must be entered in the **Reason Declined** field. If any decision is entered except for *No Response*, a **Response Completion Date** is required.

If the **Grant User** field is populated, then the following fields are required and can be inferred from the Grant User table based on the **Grant User** selected:

- Email
- Name
- Unit

Grant Application Status Folder

Applying for grants is an intricate process which requires multiple steps and various details. Grant Users typically spend significant time coordinating and collaborating information throughout the application process. This includes tracking the status of the grant in the pre-application and application phases, documenting board approvals, and many deadline dates within the grant application process. Grant Users can manage the process of applying for a specific opportunity via the Grant Application Status Folder

(GTAPSF) or Grant Application (GTAP) transaction, based on user authorization. Users can go directly to the Grant Application, skipping the previous Grant Notification and Response steps in the grant lifecycle. The GTAP transaction updates the GTAPSF table.

The system will issue an error if you attempt to update fields directly on the Application Status Folder if a revision transaction is in *Draft* or *Pending* status. This edit prevents users from updating data on the table which will subsequently be overridden once the revision transaction is submitted to *Final*. The exception to this rule applies to the **Completion Date**, **Approver Name**, and **Comments** fields, which may be edited even if a Grant Application Revision transaction has been created for the Grant ID.

The Grant Application Status Folder (GTAPSF) contains the following tabs:

- Grant Application
- Application Dates
- Alerted Users
- Partnering Organizations
- Partnering Dates
- Alerted Partners
- Legislative Bodies
- Funding Allocation
- Transactions
- Attachments

Tasks

The "Create Grant Application" topic contains instructions on creating a Grant Application using the Grant Application Status Folder (GTAPSF).

Grant Application

The Grant Application tab on the Grant Application Status Folder (GTAPSF) allows a Grant User to enter an application for a specific Grant Opportunity. This tab provides information such as the **Grant Opportunity ID** that the Grant Application is referencing and the unique **Grant ID** for the application. The **Grant ID** field is used to uniquely distinguish each application. Once a **Grant ID** is entered, it is used throughout the lifecycle of that application (for example, on the award, amendment, and so forth). A user can create a unique **Grant ID** or the system can auto-generate one for the user.

› Required/Conditionally Required Fields

The following fields are required:

- Grant Opportunity ID
- Department

- Grant ID
- Grant ID Name
- Funding Request
- Contact Name
- Contact Phone
- Contact Email

Note: The Date Definition Template ID is defaulted based upon the Department of the user entering in the Application. If the Department is not specified for the user, it will use the Department of ALL to default the Date Definition Template ID. Click the **Load Date Definition Template** tab-level action to load the dates associated with the template to the Application Dates tab. Some of the fields are display only and some allow changes to be made. The rules are established by Grant Date Code on the Grant Date Definition (GRNTDEF) table and by the Template ID on the Grant Date Definition Template Details (GRNTDET) page.

The Grant Application tab contains the following actions/links:

- Tab-level actions/links
  - **Load Date Definition Template** - This action loads the dates associated with the template selected in the Date Definition Template ID field to the Application Dates tab.

Application Dates

Some of the fields on this tab are display only and some allow changes to be made. The rules are established by Date Code on the Grant Date Definition (GRNTDEF) table and by template on the Grant Date Definition Template Details (GRNTDET) table.

Grant Date Code records can manually be deleted from this tab unless there is a Completion Date value or the Date Required field on the Grant Date Definition Template (GRNTDTT) table is Yes. If a Grant User has been manually deleted from an Alert User Group, then they will receive an email notifying them that they were deleted from that notification. If their Alert Type was Calendar then they will receive a Calendar Removal Alert, which will remove the appointment from their Outlook Calendar.

The Application Dates tab contains the following actions/links:

- Tab-level actions/links
  - **Load Alert User Group Template** - This action loads all users associated with the User Group template specified in the Alert User Guide ID field to the Alerted Users tab.

Alerted Users

The Alerted Users tab allows you to indicate the users that you want to receive an alert about specific application dates. This tab should only be updated if users will be alerted about impending dates. You can select a user group template from the **Alert User Group ID** pick list on the Application Dates tab, and then click the **Load Alert User Group Template** tab-level action to load all users that belong to that template.

You can manually add Grant Users, delete users loaded from the template, and you can modify the email address for Grant Users added from the template. However, any modifications made to the records in this grid will not update the Grant User Group Template (GRNTTMPL) table.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully save a Grant Application record. However, the following fields are required, if a record is added to this tab:

- Name
- Email

Partnering Organizations

The Partnering Organizations tab on the Grant Application Status Folder (GTAPSF) allows you to indicate all Partnering Organizations associated with the Grant Application. This tab tracks applications that are submitted with other community-based organizations or when any collaboration needs to take place between two or more entities. Please refer to the "Grant Application" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully save a Grant Application record. However, the following fields are required, if a record is added to this tab:

- Partner Name
- Contact Name
- Email
- Phone

If you indicate a value in the **Date Definition Template ID** field, then you must select the **Load Date Definition Template** row-level action to load the dates to the Partnering Dates tab.

The Partnering Organizations tab contains the following actions/links:

› Tab-level actions/links

- **Load Date Definition Template** - This action loads the dates associated with the template selected in the Date Definition Template ID to the Partnering Organization Dates grid.

Partnering Dates

The Partnering Organization Dates tab lists all of the dates that are associated with the partnering organization record selected on the Partnering Organizations tab.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully save a Grant Application record. However, the following field is required, if a record is added to this tab:

- Grant Date Code

› Tab-level actions/links

- **Load Alert User Group Template** - This action loads all users associated with the User Group template specified in the Alert User Guide ID field to the Alerted Partners tab.

Alerted Partners

The Alerted Partners tab on the Grant Application Status Folder (GTAPSF) allows you to indicate the users that you want alerted about impending partnering organization dates. See the "Alerted Users" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully save a Grant Application record. However, the following field is required, if a record is added to this tab:

- Name
- Email

Legislative Bodies

The Legislative Bodies tab of the Grant Application Status Folder allows you to indicate all Grant Legislative Bodies associated with the Grant Application, Award, and Amendment. The reason that all three statuses can be updated from the GTAPSF is because the same Grant Legislative Bodies record is shared across the three statuses. This tab tracks the various governmental branches/jurisdictions within the Grant Award. All Grant Legislative Bodies must be established on the Grant Legislative Body (GRNTLB) table prior to being added to the transaction.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully save a Grant Application record. However, the following fields are required, if a record is added to this tab:

- Legislative Body ID
- Elected Official Name
- District Number (inferred)
- Legislative Body District (inferred)

Funding Allocation

The Funding Allocation tab of the Grant Application Status Folder (GTAPSF) allows you to indicate all Funding Allocations associated with the Grant Application. Funding Allocation records track the requested, awarded and amended amounts associated with specific governmental branches/jurisdictions or Grant Service Planning Area (SPA). A particular funding allocation record associated with an application is also shared with an award and amendment record because the key information (for example, SPA) does not change throughout the grant lifecycle whereas a user can solely input the value associated with that status. For example, a user can only update the awarded amount when accessing a Funding Allocation record from the Award Status Folder.

- Required/Conditionally Required Fields

  A record does not have to be added to this section to successfully save a Grant Application record. However, the following fields are required, if a record is added to this tab:

  - Supervisorial District or SPA ID
  - Period of Performance From
  - Period of Performance To

Grant Award Status Folder

There are many details which must be recorded once the grantee has been awarded the grant. The Grant Award Status Folder (GTAWSF) and Grant Award (GTAW) transaction allow for the central tracking of the grant award information including the status of the award acceptance approval process and miscellaneous award requirements. The GTAW transaction updates the GTAWSF table.

The system will issue an error if you attempt to update fields directly on the Grant Award Status Folder if a revision transaction is in *Draft* or *Pending* status. This edit prevents users from updating data in the Status Folder which will subsequently be overridden once the revision transaction is submitted to Final. The exception to this rule applies to the **Completion Date**, **Approver Name**, and **Comments** fields, which may be edited even if a Grant Award Revision transaction has been created for the **Grant ID**.

Note: Refer to the "ARRA Compliance Tracking and Reporting" topic, if the award includes funding from the American Recovery and Reinvestment Act of 2009 (ARRA).

The Grant Award Status Folder (GTAWSF) contains the following tabs:

- Grant Award
- Award Dates
- Alerted Users
- Program Management
- Program Details
- Program Dates
- Alerted Program Management

- Reporting
- Reporting Dates
- Alerted Users
- Legislative Bodies
- Funding Allocation
- Transactions
- Attachments

Tasks

The "Create Grant Award" section contains instructions on creating a Grant Award using the Grant Award Status Folder (GTAWSF).

Grant Award

The Grant Award tab of the Grant Award Status Folder captures the Grant Award information.

› Required/Conditionally Required Fields

The following field is required:

- Grant ID
- Awarded Amount - This cannot be changed on the Award Status Folder or the Award transaction after any Amendment has been posted. At that point, it must be revised via a Grant Amendment.
- Award Notification Date
- Funding Instrument Type
- Funding Agency - This information is inferred from the Grant Opportunity; however, it can be modified on this tab. Note: The **Opportunity Status** maintains the original Funding Agency whereas the **Award Status** stores the updated Funding Agency. There is a pick list which infers the contact information and address information from the Billing Contact Address associated with the Customer record. Updated contact information for the Funding Agency is not updated in the Grant Opportunity.

The Award Dates can be added one at a time on the Award Dates tab, or a **Date Definition Template ID** can be specified. The **Load Date Definition Template** action loads the dates associated with the template to the Award Dates tab.

This tab contains the following actions/links:

› Tab-level actions/links

- **Load Date Definition Template** - This action loads the dates associated with the template selected in the Date Definition Template ID to the Award Dates tab.

Award Dates

Dates can be added to this tab one at a time, or dates can be loaded from a template defined in the Date Definition Template ID field on the Grant Award tab. The dates are loaded from the template after selecting the Load Date Definition Template tab-level action on the Grant Award tab.

› Required/Conditionally Required Fields

The following field is required:

- Grant Date Code

› Tab-level actions/links

- **Load Alert User Group Template** - This action loads all users associated with the User Group template specified in the Alert User Guide ID field to the Alerted Users tab.

Alerted Users

The Alerts Users tab on the Grant Award Status Folder allows you to indicate the users that you want alerted about specific award dates. Please refer to the "Alerted Users" topic under the Grant Application Status Folder to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully save a Grant Award record. However, the following fields are required, if a record is added to this tab:

- Name
- Email

Program Management

The Program Management tab of the Grant Award Status Folder facilitates the establishment of high level Cost Accounting COA structure data and matching percentages within an award of the Grant Lifecycle Management subsystem. A Project Manager can then trigger a draft Cost Accounting Setup (CAS) transaction which is used to establish the COA data in the Cost Accounting subsystem.

› Major Program Details

This section allows you to associate basic Cost Accounting elements (for example, Major Program) with the Grant Award. If the **Perform Cost Accounting Updates** field is *Yes*, then upon the status folder record being saved, a Cost Accounting Setup (CAS) transaction, with a **Phase** of *Draft*, will be created automatically. You may also select existing Major Programs which infers the **Major Program Name**, **Major Program Description**, and **Split Type** from the Major Program table. This information will be populated on the Major Program and PPC tabs of the CAS transaction upon creation.

Once a CAS transaction has been generated for a Program Management record, the system will not allow another CAS transaction to be automatically created unless the referenced CAS transaction has been discarded (while still in a **Phase** of *Draft*.) After the initial CAS transaction has been discarded, you will need to set the **Perform Cost Accounting Updates** field to *No* and save the record, and then save the record a second time with the field set back to *Yes* to generate a new CAS transaction. Any changes made to the Program Management records after a CAS transaction has been created will not update the CAS transaction and will have to be made to the Cost Accounting tables directly.

Additionally, the system will not allow the **Perform Cost Accounting Updates** field to be set to *No* if the **Generated Transaction ID** field is populated and therefore the referenced transaction has not been discarded. Instead, an error is issued and the field will revert to *Yes*.

The system will infer the Grant ID from this tab to the generated CAS transaction based on the value selected for the Grant Tracked As A field on the Grant Award tab. For example, if the **Grant Tracked As A** field is set to *Major Program*, the system will automatically populate the Grant ID field in the CAS transaction's Major Program tab. If the Grant Tracked As A field is set to *Program Period*, the system will automatically populate the Grant ID field in the CAS transaction's Major Program tab.

Finally, the system will not allow you to delete a Program Management record if a Cost Accounting Setup (CAS) transaction has already been generated. Provided a CAS transaction has not been created, then the Program Management record will be deleted along with any child records.

› Matching

This section allows Matching Details to be created, modified, or deleted. The matching details information can be created and modified but matching information does not impact the Cost Accounting Setup (CAS) transaction. Any matching information associated with the reimbursement of a grant (that is, funding profile information) must be manually updated in the CAS transaction after it has been generated in order to impact the Cost Accounting subsystem.

The Program Management tab contains the following actions/links:

› Tab-level actions/links

- **Load Date Definition Template** - This action loads the dates associated with the template specified in the **Date Definition Template ID** field to the Program Dates tab.

Program Details

The Program Details tab on the Grant Award Status Folder allows you to assign a new Program code within the identified Major Program and build the relationship to any existing Phases. If you enter an existing Program code, then the system infers the Program Name and Program Description from the Program (PROG) table. The same Program can be used multiple times as long as they are associated with a different Phase. This information is populated on the Program and Program Phase tabs of the Cost Accounting Setup transaction upon creation.

Program Dates

The Program Dates tab on the Grant Award Status Folder lists all of the dates that are associated with the Program Management record. Each Program Management record can have different dates. Please refer to the "Grant Application" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully save the Grant Award Status Folder record. However, the following field is required, if a record is added to this tab:

- Grant Date Code

This tab contains the following actions/links:

› Tab-level actions/links

- **Load Alert User Group Template** - This action loads all users associated with the User Group template specified in the Alert User Guide ID field to the Alerted Program Management tab.

Alerted Program Management

The Alerted Program Management tab on the Grant Award Status Folder allows you to indicate the users that you want alerted about specific program management dates. Please refer to the "Alerted Users" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAW transaction. However, the following fields are required, if a record is added to this tab:

- Name
- Email

Reporting

The Reporting tab on the Grant Award Status Folder allows you to view or create reporting schedules that remind the Project Manager of when information should be reported internally or back to the grantor. This functionality supports the management of grants by ensuring that the Grant User is reminded appropriately of upcoming due dates. The Grant User can load reporting dates using the **Load Reporting Dates** row-level action.

The Reporting tab on the Grant Award Status Folder (GTAWSF) contains the following sections:

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully save a Grant Award record. However, the following fields are required, if a record is added to this tab:

- Grant Date Code

- Alert User Group ID
- Report Type
- Frequency (must be populated for reporting dates to load)
- Reporting Start or Reporting End dates (must be populated for reporting dates to load)

You may change the values in the **Grant Date Code**, **Frequency**, **Reporting Start**, or **Reporting End** fields. If these values are changed on the Reporting tab and then the **Load Reporting Dates** row-level action is clicked, then the system will delete all existing system-generated date records and associated Grant Users for each Alert User Group for those records which do not have the **Completion Date** populated. The system will then reload new reporting Dates, Alert User Groups and Grant Users based on the new values specified in aforementioned fields. (Although Due Date is not part of the key in other status dates, it is for Reporting Schedules, along with Grant Date Code and Section.) However, the system will not delete records that were manually inserted on the transaction; you will need to manually delete such records, if required.

This tab contains the following actions/links:

› Row-level actions/links

- **Load Reporting Dates** - This action loads reporting dates to the Reporting Dates tab, if Grant Date Code, Report Type, Frequency, Reporting Start, and Reporting End fields are populated.

Reporting Dates

The Reporting Dates tab lists all of the impending due dates that facilitate reminding the Project Manager of the grant's internal or external reporting requirements. This is where the Due Date and Completion Date are entered for each reporting requirement. This tab is automatically populated if, on the Reporting tab, a value is entered in the Grant Date Code, Report Type, Frequency, Reporting Start, Reporting End fields, and the Load Reporting Dates row-level action is selected on the Reporting tab.

If the Alert User Group ID field is populated on this tab, then the Load Alert User Group Template row-level action must be selected to load all users associated with the user group template to the Reporting Alerted Users tab.

Alerted Users

The Alerted Users tab on the Grant Award Status Folder allows you to indicate the users that you want alerted about impending reporting schedule due dates. Please refer to the "Alerted Users" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully save a Grant Award record. However, the following fields are required, if a record is added to this tab:

- Name
- Email

Legislative Bodies

The Grant Legislative Bodies tab of the Grant Award Status Folder allows you to indicate all Grant Legislative Bodies associated with the Grant Application, Award, and Amendment. All Legislative Bodies must be established on the Grant Legislative Body (GRNTLB) table prior to being added to the transaction. Please refer to the GTAPSF "Legislative Bodies" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully save a Grant Award record. However, the following fields are required, if a record is added to this tab:

- Legislative Body ID
- Elected Official Name
- District Number (inferred)
- Legislative Body District (inferred)

Funding Allocation

The Funding Allocation tab of the Grant Award Status Folder allows you to indicate all Funding Allocations associated with the Grant Application, Award, and Amendment. Please refer to the GTAPSF "Funding Allocation" tab to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully save a Grant Award record. However, one of the following fields are required, if a record is added to this tab:

- Supervisorial District or SPA ID

Grant Amendment Status Folder

The grantor might request/permit an adjustment to be made to the award which must be tracked separately because they occur after the award is accepted. Grant Managers can track these changes to the original grant award, award amount or grant period via amendments. The system distinctly tracks the original award along with any amendments. These types of changes to a Grant Award are tracked via the Grant Amendment (GTAM) transaction and the Grant Amendment Status Folder (GTAMSF), based on user authorization. In turn, the Grant Amendment Status provides central tracking of amendment(s) to a previously awarded grant whereas the GTAM transaction updates the GTAMSF table.

The system will issue an error if you attempt to update fields directly on the Amendment Status Folder if a revision transaction is in Draft or Pending status. This edit prevents users from updating data on the Status Folder which will subsequently be overridden once the revision transaction is submitted to Final. The exception to this rule applies to the **Completion Date**, **Approver Name**, and **Comments** fields, which may be edited even if a Grant Amendment Revision transaction has been created for the **Grant ID**.

The Grant Amendment Status Folder (GTAMSF) contains the following tabs:

- Grant Amendment

- Amendment Dates
- Alerted Users
- Reporting
- Reporting Dates
- Alerted Users
- Legislative Bodies
- Funding Allocation
- Transactions
- Attachments

Tasks

The "Make Adjustments to Grant Award" section contains instructions on making adjustments to a Grant Award using the Grant Amendment Status Folder (GTAMSF).

Grant Amendment

The Grant Amendment tab of the Grant Amendment Status Folder (GTAMSF) provides information on the Grant Amendment.

› Amount Calculations

The system calculates a **Total Amended Amount** by adding the **Awarded Amount** to the current **Amendment Amount** plus any Prior Amendment records. The **Prior Amendment** field is the sum total of all previous **Amendment Amounts** (Amendment Amounts that were recorded before the current record), for that particular Grant ID, in the Grant Amendment Status Folder. The total of all Amended Amounts within the particular Grant ID in the Funding Allocation tab should equal the **Total Amended Amount** field upon validating or submitting the transaction, otherwise a warning will display.

› Required/Conditionally Required Fields

The following field is required:

- Grant ID
- At least one of the Amendment Type options need to be selected to successfully save an Amendment record.

*Note: You can create an Amendment with one or more Amendment Type options selected.

- When the **Dollar Value** option is selected, then you have to enter a value in the **Amendment Amount** field.

- When the **End Date** option is selected, then you have to enter a value in the **Revised Funding Period From** and **Revised Funding Period To** fields.
- When the **Scope Change**, **Termination**, **Return of Funding** or **Other** option is selected, then you have to enter a value in the **Comments** field.

Amendment Dates

The Amendment Dates tab on the Grant Amendment Status Folder (GTAMSF) lists all of the dates that are associated with the amendment record.

› Required/Conditionally Required Fields

The following field is required:

- Grant Date Code

› Tab-level actions/links

- **Load Alert User Group Template** - This action loads all users associated with the User Group template specified in the Alert User Guide ID field to the Alerted Users tab.

Alerted Users

The Alerted Users tab on the Grant Amendment Status Folder (GTAMSF) allows you to indicate the users that you want alerted about specific amendment dates. Please refer to the GTAPSF "Alerted Users" topic to learn more about this functionality.

› Field Information

The following fields are required, if a record is added to this tab:

- Name
- Email

Reporting

The Reporting tab of the Grant Amendment Status Folder (GTAMSF) contains the same fields as the Reporting tab on the GTAWSF table. Refer to the "Reporting" topic under the "Grant Award Status Folder" topic for more information.

Reporting Dates

The Reporting Dates tab of the Grant Amendment Status Folder (GTAMSF) contains the same fields as the Reporting Dates tab on the Grant Award Status Folder Refer to the "Reporting Dates" topic under the "Grant Award Status Folder" topic for more information.

Alerted Users

The Alerted Users tab of the Grant Amendment Status Folder (GTAMSF) contains the same fields as the Alerted Users tab on the Grant Award Status Folder (GTAWSF).

Legislative Bodies

The Legislative Bodies tab of the Grant Amendment Status Folder (GTAMSF) contains the same fields as the Legislative Bodies tab on the GTAWSF table. Refer to the "Legislative Bodies" topic under the "Grant Award Status Folder" topic for more information.

Funding Allocation

The Funding Allocation tab on the Grant Amendment Status Folder allows you to indicate all Funding Allocations associated with the Grant Application, Award, and Amendment. Please refer to the GTAPSF "Funding Allocation" topic to learn more about this functionality

- Required/Conditionally Required Fields

  A record does not have to be added to this tab to successfully save a Grant Amendment record. However, the following field is required, if a record is added to this tab:

  - Supervisorial District or SPA ID

Grant Close-Out/Audit Status Folder

The auditing of a grant can take a significant amount of time while requiring multiple levels of approval. The Grant Manager can record audit related information, audit dates and audit approvers in the Grant Lifecycle Management subsystem. In addition to tracking the grant audit process, the Grant Managers can mark the grant closed via the Grant Close-Out/Audit (GTCO) transaction or the Grant Close-Out/Audit Status Folder (GTCOSF) table. The GTCO transaction updates the GTCOSF table.

The system will issue an error if you attempt to update fields directly on the Close-Out/Audit Status Folder if a revision transaction is in *Draft* or *Pending* status. This edit prevents users from updating data on the table which will subsequently be overridden once the revision transaction is submitted to Final. The exception to this rule applies to the **Completion Date**, **Approver Name**, and **Comments** fields, which may be edited even if a Grant Close-Out/Audit Revision transaction has been created for the **Grant ID**.

The Grant Close-Out/Audit Status Folder (GTCOSF) contains the following tabs:

- Grant Close-Out/Audit
- Close-Out/Audit Dates
- Alerted Users
- Transactions
- Attachments

Tasks

The "Manage Grant Close-Out/Audits" tab contains instructions on tracking the grant audit process and marking the grant closed using the Grant Close-Out/Audit Status Folder (GTCOSF).

Grant Close-Out/Audit

The Grant Close-Out / Audit tab on the Grant Close-Out/Audit Status Folder allows the grant manager to capture the grant information and trigger the closing of the Grant.

When the **Close Grant** field is set to *Yes*, the associated Cost Accounting Chart of Accounts (COA) codes(s) are marked as inactive by setting the **Active** field to *No*. In turn, the system uses the **Grant ID** of the Grant Close-Out/Audit record to locate the associated Funding Profile (via the Funding Line), Program Code(s), or Major Program Code(s) in that order and mark them as inactive. Closing the grant updates the **Opportunity Status** to *Closed* for the particular Grant Opportunity ID on the Grant Opportunity Status Folder. Unselecting the **Close Grant** check box reverses the process noted above and updates the status to In-progress. There can only be one Grant ID record per Grant Close-Out/Audit transaction.

- Total Amended Amount

  The **Total Amended Amount** displays the sum of the **Awarded Amount** + **Prior Amendment** + **Amendment Amount**.

- Required/Conditionally Required Fields

  The following field is required:

  - Grant ID

This tab contains the following actions/links:

- Tab-level actions/links

  - **Load Date Definition Template** - This action loads the dates associated with the template specified in the **Date Definition Template ID** field to the Close-Out/Audit Dates tab.

Close-Out/Audit Dates

The Close-Out/Audit Dates tab on the Grant Close-Out/Audit Status Folder allows the Grant Administrator to set up a schedule of Audit Tasks with a due date of when audits need to be performed and sent to the Grantor. The Grant Administrator can assign an approver and alert a user group with next alert date and message. The audit dates have a place to track completion of the audit or close-out.

- Required/Conditionally Required Fields

  The following field is required:

  - Grant Date Code

- Row-level actions/links

  - **Load Alert User Group Template** - This action loads all users associated with the User Group template specified in the Alert User Guide ID field to the Alerted Users tab.

Alerted Users

The Alerted Users tab on the Grant Close-Out/Audit Status Folder (GTCOSF) allows you to indicate the users that you want alerted about specific audit or close-out dates. Please refer to the GTAPSF "Alerted Users" tab to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully save a Close-Out/Audit record. However, the following fields are required, if a record is added to this tab:

- Name
- Email

ARRA Compliance Tracking and Reporting

In February 2009, Congress passed and President Obama signed the American Recovery and Reinvestment Act of 2009 (ARRA), commonly referred to as the 'Recovery Act' and widely recognized as the 'Stimulus bill'. This legislation is a critical component of the government's effort to rebuild the American economy and invest in the nation's critical infrastructure. Included in the funding act are increased requirements on the transparency and accountability of how these funds are being spent.

ARRA Reporting occurs on a quarterly basis, within 21 days of the end of each quarter. The award recipient must consolidate information related to the award and transmit this information to the Office of Management and Budget (OMB). CGI Advantage can be used to capture and send this information to the OMB office. OMB will then consolidate all of the data from all recipients and present this information as the national results of the Recovery Act.

When collecting award information for ARRA Reporting, the following sequential events occur:

1. Award Opportunity and Application Management
2. Record a new Award
3. Initiate ARRA Reporting
4. Gather and Record ARRA Data at the End of the Quarter
5. Gather and Record Recipient Vendor Information
6. Gather and Record Sub-Recipient ARRA Data at the End of the Quarter
7. Gather and Record Sub-Recipient Vendor Information
8. Report ARRA Information to the Federal Government

Note: Steps 3 through 7 can also be accomplished through the ARRA Information (ARRAD) transaction, which allows you to route the information through workflow for approvals before updating the ARRA tables.

Step 1: Award Opportunity and Application Management

The Grant Opportunity (GTOP) transaction and the Grant Opportunity Status Folder (GTOPSF) are used to capture the opportunity information. Opportunity information from www.grants.gov can also be automatically downloaded into the Available Opportunity Detail (GTAOD) and Available Opportunity Summary (GTAOS) pages via the Grant Opportunity Update job. GTOP transactions can then be created directly from these pages. Refer to the "Grants.gov Opportunities" topic for more information.

Grant Users can manage the process of applying for a specific opportunity via the Grant Application Status Folder (GTAPSF) or Grant Application (GTAP) transaction, based on user authorization.

Step 2: Record a New Award

There are many details which must be recorded once the grantee has been awarded the grant. The Grant Award Status Folder (GTAWSF) table and Grant Award (GTAW) transaction allow for the central tracking of the grant award information including the status of the award acceptance approval process and miscellaneous award requirements. The GTAW transaction updates the GTAWSF table.

Once the award is awarded, the award manager defines milestones for ARRA reporting to occur quarterly. Defining the specific milestones will vary by site, but typical milestones might be:

- Remind Sub-Recipients that information is due in 10 days.
- Deadline for Sub-Recipient information
- Gather financial reporting information
- Consolidate ARRA reporting information
- Enter ARRA reporting information online
- Run reports to preview ARRA reporting file

Step 3: Initiate ARRA Reporting

At the time of award, the award Manager initiates ARRA reporting for an award by navigating to the ARRA Information (ARRA) table and entering information on the Ongoing Award Information table, which captures information that is constant for the life of the award. Refer to the "Ongoing Award Information" topic for more information.

Step 4: Gather and Record ARRA Data at the End of the Quarter

Data gathering is a process that occurs outside of CGI Advantage. Award information includes both financial and status information for the Quarterly Award Information table. Some possible sources could be:

- Status reports from the project, grant, contract and loan managers.
- Financial data from CGI Advantage Cost Accounting, or other financial systems.
- Spreadsheets, miscellaneous reports, and other queries from various systems.
- Phone calls, e-mails, and other informal means of gathering status.

Refer to the "Quarterly Award Information" topic for more information.

Step 5: Gather and Record Recipient Vendor Information

In addition to the information on the award that is tracked on the Ongoing Award Information and Quarterly Award Information tables, recipients must report on the money that is paid to vendors. This information is tracked on the Recipient Vendor Quarterly Information table.

Refer to the "Recipient Vendor Quarterly Information" topic for more information.

Step 6: Gather and Record Sub-Recipient ARRA Data at the End of the Quarter

Award managers collect Sub-Recipient information from disparate sources and enter it into the ARRA reporting pages. Some possible sources could be:

- Detailed information from the project, grant, contract and loan managers
- Financial data from CGI Advantage, or other financial systems.
- Reports (paper or electronic) from Sub-Recipients.
- Spreadsheets, miscellaneous reports, and other queries from various systems.
- Phone calls, e-mails, and other informal means of gathering status.

Sub-Recipient information for ARRA reporting is either presented in detail or in aggregate – depending on the size of the sub-award and the gross income of the sub-recipient. A single award could have both detailed and aggregate information.

- Aggregate information is entered on the Quarterly Award Information table.
- Detailed information is entered on the Sub-Recipient Quarterly Award Information table. Refer to the "Sub-Recipient Quarterly Award Information" topic for more information.

Step 7: Gather and Record Sub-Recipient Vendor Information

The sub-recipient must also report any payments greater than $25,000 to the Federal Government. This information is tracked in Advantage on the Sub-Recipient Vendor Quarterly Information table. Refer to the "Sub-Recipient Vendor Quarterly Information" topic for more information.

Step 8: Report ARRA Information to the Federal Government

The ARRA Quarterly Extract batch process generates ARRA files that can be uploaded to www.federalreporting.gov as part of the federal stimulus reporting requirements. The batch process selects records from the ARRA tables and produces one XML file for each Funding Agency and Award ID combination.

The ARRA tables used as input to the ARRA Quarterly Extract batch process are:

- Ongoing Award Information
- Quarterly Award Information
- Sub Recipient Quarterly Award Information
- Recipient Vendor Quarterly Information
- Sub-Recipient Vendor Quarterly Information

Transaction Information

This topic includes the following area:

- ARRA Information (ARRA) Transaction Type
- Grant (GT) Transaction Type

Transaction Code Glossary

All Transactions Codes that can be utilized by the Grants area are listed below alphabetically by Transaction Name.

Transaction Name	Transaction Code	Transaction Type
ARRA Information	ARRAD	ARRA
Grant Amendment	GTAM	GT
Grant Amendment Revision	GTAMR	GT
Grant Application	GTAP	GT
Grant Application Revision	GTAPR	GT
Grant Award	GTAW	GT
Grant Award Revision	GTAWR	GT
Grant Close-Out/Audit	GTCO	GT
Grant Close-Out/Audit Revision	GTCOR	GT
Grant Opportunity	GTOP	GT
Grant Opportunity Revision	GTOPR	GT

Grant Response	GTRE	GT

ARRA Transaction Type

The ARRA Information (ARRA) Transaction Type is provided so that the records can be routed through workflow for approvals before updates are made to the ARRA tables. The ARRAD transaction does not allow you to modify any existing ARRA table records. The transaction can only be used to enter new records, either on all associated ARRA tables at once, or on any “child” table after the “parent” records have been loaded to the transaction. Final ARRAD transactions cannot be modified and Final ARRAD transactions cannot be cancelled. All business rules associated with the ARRA tables apply to the ARRAD transaction.

› Loading Existing Records

- The **Load Existing Record** action loads corresponding ARRA table records based on “key” fields.
  - Any values already in the transaction record are overwritten.
  - Upon selection of the **Load Existing Record** action, if the **Record Type** is blank, the transaction defaults the **Record Type** to *Existing*.
  - An error is received if the record cannot be located.
- During **Validate/Submit**, for any record with a **Record Type** of *Existing*:
  - Advantage automatically attempts to load the most recent corresponding table record.
  - Any values already in the transaction record are overwritten (whether typed or previously loaded).
  - An error is received if the record cannot be located.
- During **Validate/Submit** for any record with **Record Type** of *New*:
  - Advantage checks if a table record with the corresponding keys already exists and issues an error if it does.
  - Note: You cannot have a “child” record with a **Record Type** of *Existing* and a “parent” record with a **Record Type** of *New*. For example, you cannot have an “Existing” Recipient Quarterly record for a “New” Ongoing Award Information record.

The ARRA Information (ARRAD) transaction contains the following tabs:

- Header
- Ongoing Award
- Activity Information

- Recipient Quarterly Award
- Recipient Vendor Quarterly
- Sub Recipient Quarterly Award
- Sub-Recipient Vendor Quarterly

ARRA Delivered Transaction Codes

The ARRA Transaction Type has the following Transaction Code (listed alphabetically by Transaction Name):

Transaction Name	Transaction Code	Intended Use
ARRA Information	ARRAD	This transaction allows you to enter new records on any of the ARRA tables.

Header

The Header tab of the ARRAD transaction allows you to specify general information about the ARRA record.

› Required/Conditionally Required Fields

The following fields are required, and if left blank are automatically populated by CGI Advantage:

- Record Date
- Fiscal Year
- Period

The following fields are conditionally required based on site specific setup on the Transaction Control (DCTRL) table:

- Transaction Name
- Transaction Description

Ongoing Award

The Ongoing Award tab of the ARRAD transaction is used to record the details of the award (grant) and the grant recipient. Only one line is allowed on this tab of the ARRAD transaction.

› Required/Conditionally Required Fields

The following fields are required:

- Funding Agency
- Award Number
- Awarding Agency

The following fields are conditionally required if the Load Existing Ongoing Award for New Quarter action will be selected to populate the Quarterly Award tab.

- Target Reporting Period End Date
- Target Reporting Calendar Year

The **Record Type** should be set to *New*, if the record being added does not exist on the Ongoing Award Information table. The **Record Type** should be set to *Existing*, if the record being added already exists on the Ongoing Award Information table. If the **Record Type** is left blank, Advantage will default the value to *Existing*.

If adding a new record to the Ongoing Award Information table, the following field is required:

- Recipient DUNS Number
- Award Type

This tab allows you to secure the ARRAD transaction by Department and Unit. If Unit is populated, then the Department field must be populated too.

This tab contains the following actions/links:

› Tab-level actions/links

- **Load Existing Ongoing Award as New Quarter** - This action loads existing records as a new quarter to the Recipient Quarterly Award tab.
- **Load Existing Ongoing Award** - This action loads corresponding ARRA records based on "key" fields.
    - Any values already in the transaction record are overwritten.
    - Upon selection of the Load Existing Ongoing Award action, if the Record Type is blank, the transaction defaults the Record Type to *Existing*.
    - An error is received if the record cannot be located.

Activity Information

The Activity Information tab of the ARRAD transaction allows you to enter multiple ARRA Activity values associated with an ongoing record. If the record on the Ongoing Award tab already exists on the Ongoing Award Information table, then all ARRA Activity records associated with the ongoing record are loaded when **Load Values** is selected. You can then add new ARRA Activity records or delete existing records. Note: Records deleted from this tab are not deleted from the ARRA Activity tab of the Ongoing

Award Information table. A record must exist on the Ongoing Award tab of the ARRAD transaction (Record Type can be *New* or *Existing*) before a record can be added to this tab.

The Activity Information tab of the ARRAD transaction contains the following section:

› Required/Conditionally Required Fields

The following fields are required if a new ARRA Activity record is being added:

- Record Type = New
- ARRA Activity Code
- ARRA Activity Description

The **Record Type** should be set to *New*, if the record being added does not exist on the Ongoing Award Information table. The **Record Type** should be set to *Existing*, if the record being added already exists on the Ongoing Award Information table. If the **Record Type** is left blank, Advantage will default the value to *Existing*.

Note: At least one ARRA Activity Code (and no more than 10) is required to submit a quarterly ARRA Reporting extract file to recovery.gov. This edit is enforced by the ARRA Extract batch process.

Recipient Quarterly Award

The Recipient Quarterly Award tab of the ARRAD transaction captures quarterly data for ARRA reporting. This information could come from a number of sources outside of the Grant Lifecycle Management system. Some possible sources could be:

- Status reports from the project, grant, contract and loan managers.
- Financial data from CGI Advantage Cost Accounting, or other financial systems.
- Spreadsheets, miscellaneous reports, and other queries from various systems.
- Phone calls, e-mails, and other informal means of gathering status.

A record must exist on the Ongoing Award tab of the ARRAD transaction, before a record can be added to this tab. Only one line is allowed on the Quarterly Award tab.

The **Days Allowed to verify quarterly reports** (DAYS_TO_VERIFY_ARRA_DATA) parameter on the Application Parameters (APPCTRL) table controls the period in which quarterly ARRA reporting records may be modified. The initial value for this field as established by Federal Rules is 21. Per Federal Rules, quarterly entry may only be modified for 21 days after the end of the quarter ending date. After 21 days, no further changes to the records are allowed and updates should be made in the next quarter.

A record may already exist on this tab if the **Load Existing Recipient Quarterly Award as New Quarter** action was selected on the Ongoing Award tab. The **Reporting Calendar End Date** and **Reporting Calendar Year** are set to the **Target Reporting Calendar Year** and **Target Reporting Quarter End Date** entered on the Ongoing Award tab.

If no record already exists, insert a new line, enter the **Reporting Calendar Year** and **Reporting Quarter End Dat**e of any previous quarter and then select the **Load Existing Recipient Quarterly Award** action.

- If no record is returned, no Quarterly Award Information table record was found and you may proceed to enter a new record by setting the **Record Type** value to *New* and entering data. Note: The **Funding Agency**, **Award Number**, and **Awarding Agency** are automatically populated from the Ongoing Award tab. These are required fields along with the **Reporting Calendar Year** and **Reporting Quarter End Date**.
- Any records found on the Quarterly Award Information table that match the entered Funding Agency, Award Number, Awarding Agency, Reporting Calendar Year and Reporting Quarter End Date values will be returned and the Record Type is set to Existing. Once records are returned you can modify loaded values in order to create a new record on the Quarterly Award Information table. The **Record Type** must be changed to *New* or on **Validate/Submit** the data in the corresponding Quarterly Award Information record will be re-inferred. At a minimum, you must change the values in the **Reporting Calendar Year** or **Reporting Quarter End Date** fields, or upon Validate/Submit an error is issued that the record already exists.

A warning message is issued for new Quarterly Award records if a final report was already sent (that is, the **Final Report Submitted** field is *Yes* on the Ongoing Award record). In this situation, the **Final Report** field should be set to *Yes* for the Quarterly Award record.

This tab contains the following actions/links:

› Tab-level actions/links

  - **Load Existing Recipient Quarterly Award** - This action loads corresponding ARRA records based on "key" fields.
    - Any values already in the transaction record are overwritten.
    - Upon selection of the Load Existing Recipient Quarterly Award action, if the Record Type is blank, the transaction defaults the Record Type to *Existing*.
    - An error is received if the record cannot be located.

Recipient Vendor Quarterly

The Recipient Vendor Quarterly tab of the ARRAD transaction captures money that is paid by the primary recipient on an award to vendors. Vendors that have received payments above $25,000 must be entered on this tab. All other payments can be recorded in a cumulative expenditures field. A record must exist on the Quarterly Award tab of the ARRAD transaction, before a record can be added to this tab.

› Required/Conditionally Required Fields

  - The **Funding Agency**, **Award Number** and **Awarding Agency** are inferred from the Ongoing Award tab. In addition, the **Reporting Calendar Year** and **Reporting Quarter End Date** are inferred from the associated Quarterly Award tab. All 5 fields are required and are protected.
  - **Record Type** is required.
  - To save a new record, you must enter either the **Vendor DUNS Number** or both the **Vendor Name** and **Vendor HQ Zip Code**. The Vendor DUNS Number or Vendor Name/Vendor HQ Zip Code combination must be unique for the selected Funding Agency, Award Number, Awarding Agency, Reporting Calendar Year and Reporting Quarter End Date.

Sub-Recipient Quarterly Award

The Sub Recipient Quarterly Award tab of the ARRAD transaction captures quarterly data for ARRA reporting for any first-tier sub-contract or sub-award, funded in whole or in part under the Recovery Act (that is over $25,000 and not subject to aggregate reporting). A record must exist on the Ongoing Award tab of the ARRAD transaction, before a record can be added to this tab.

The **Days Allowed to verify quarterly reports** (DAYS_TO_VERIFY_ARRA_DATA) parameter on the Application Parameters (APPCTRL) table controls the period in which quarterly ARRA reporting records may be modified. The initial value for this field as established by Federal Rules is 21. Per Federal Rules, quarterly entry may only be modified for 21 days after the end of the quarter ending date. After 21 days, no further changes to the records are allowed and updates should be made in the next quarter.

› Required/Conditionally Required Fields

  The **Funding Agency**, **Award Number** and **Awarding Agency** are inferred from the Ongoing Award tab. The **Sub-Recipient DUNS Number, Sub-Award Number**, **Reporting Calendar Year**, and **Reporting Quarter End Date** must be populated.

  Once the key fields are entered and the **Record Type** is set to *Existing* or is *blank*, the **Load Existing Sub Recipient Quarterly Award** action can be selected. Any existing records on the Sub-Recipient Quarterly Award Information table that match the key fields are loaded to this tab and the **Record Type** is set to *Existing*.

  To save a new record the **Record Type** must be set to *New*.

This tab contains the following actions/links:

› Tab-level actions/links

- **Load Existing Sub Recipient Quarterly Award** - This action loads corresponding ARRA records based on "key" fields.
    - Any values already in the transaction record are overwritten.
    - Upon selection of the Load Existing Sub Recipient Quarterly Award action, if the Record Type is blank, the transaction defaults the Record Type to *Existing*.
    - An error is received if the record cannot be located.

Sub-Recipient Vendor Quarterly

The Sub-Recipient Vendor Quarterly tab of the ARRAD transaction captures money that is paid by the sub-recipient on an award to vendors. Vendors that have received payments above $25,000 must be entered on this tab. All other payments can be recorded in a cumulative expenditures field.

A record must exist on the Sub-Recipient Quarterly Award tab of the ARRAD transaction, before a record can be added to this tab.

› Required/Conditionally Required Fields

  The **Funding Agency**, **Award Number** and **Awarding Agency** are inferred from the Ongoing Award tab. The **Sub-Recipient DUNS Number**, **Sub-Award Number**, **Reporting Calendar Year**, and **Reporting Quarter End Date** are inferred from the Sub-Recipient Quarterly Award tab. All of the fields are required and are protected.

To save a new record the **Record Type** must be set to *New*.

To save a new record, you must enter either the **Vendor DUNS Number** or both the **Vendor Name** and **Vendor HQ Zip Code**. The Vendor DUNS Number or Vendor Name/Vendor HQ Zip Code combination must be unique for the selected Funding Agency, Award Number, Awarding Agency, Sub-Recipient DUNS Number, Sub-Recipient Award Number, Reporting Calendar Year and Reporting Quarter End Date.

Once the key fields are entered and the **Record Type** is set to *Existing* or is *blank*, the **Load Values** action can be selected. Any existing records on the Sub-Recipient Vendor Quarterly Information table that match the key fields are loaded to this tab and the **Record Type** is set to *Existing*.

GT Transaction Type

The Grant (GT) Transaction Type is used for all of the various needs in the Grant Lifecycle Management subsystem.

- Grant Revisions

  Once a Grant transaction has been submitted to Final, the transaction cannot be modified. Instead, a revision transaction must be created. The revision transactions can be created via the Copy Forward action on the Grant transactions that need revised. Only one new revision transaction can be worked on at a time for a particular Grant ID, Grant Opportunity ID and/or Amendment Number.

  The revision transaction will not re-load information after the copy forward is completed, even when the key fields change. In order to prevent users from inadvertently deleting records via revision transactions, a warning is issued upon validating or submitting the transaction if the number of lines on the transaction do not match the number of lines on the status folder.

  With the exception of check box fields, the system will not blank out the value on the status folder if a value exists on the folder but does not exist on the revision transaction. For example, if a check box field is checked on the Grant Opportunity Status Folder but is not checked on the revision transaction, then the check box on the Grant Opportunity Status Folder will be updated to unchecked.

  A revision transaction can be canceled by discarding the transaction.

  Note: Final versions of the Grant Response transaction cannot be modified or cancelled. Instead, the associated Grant Response record must be updated directly on the Grant Response Status Folder (GTRESF) or a user can enter in a new Grant Response transaction to update an existing record with a new response.

GT Delivered Transaction Codes

The GT Transaction Type has the following Transaction Codes (listed alphabetically by Transaction Name):

Transaction Name	Transaction Code	Intended Use

Grant Amendment	GTAM / GTAMR	The Grant Amendment (GTAM) transaction is used to track changes to a Grant Award. The Grant Amendment Revision (GTAMR) transaction facilitates revisions of existing Grant Amendment information previously created by a GTAM transaction.
Grant Application	GTAP / GTAPR	The Grant Application (GTAP) is used to enter application information for a specific opportunity. Grant Users can manage coordination/collaboration on grant application preparation, capturing grant details including the status of the grant in the pre-application and application phases, documenting board approvals, and many deadline dates within the grant application process. The Grant Application Revision (GTAPR) transaction facilitates revisions of existing Grant Application information previously created by a GTAP transaction.
Grant Award	GTAW / GTAWR	The Grant Award (GTAW) allows for the creation of the grant award information and provides central tracking on the status of the award acceptance approval process and miscellaneous award requirements. The Grant Award Revision (GTAWR) transaction facilitates revisions of existing grant award information previously created by a GTAW transaction.
Grant Close-Out/Audit	GTCO / GTCOR	The Grant Close-Out/Audit (GTCO) allows the Grant Manager to record audit information and/or close out a Grant. The Grant Close-Out/Audit Revision (GTCOR) transaction

		facilitates revisions of existing Grant Close-Out/Audit information previously created by the GTCO transaction.
Grant Opportunity	GTOP / GTOPR	The Grant Opportunity (GTOP) allows you to enter opportunity information and to specify the Grant Users who will be notified about the Grant Opportunity. The Grant Opportunity Revision (GTOPR) transaction facilitates revision of the existing opportunity information previously created by a GTOP transaction.
Grant Response	GTRE	The Grant Response (GTRE) allows a Grant User to indicate their decision of whether or not to apply for a specific Grant Opportunity. Final versions of the Grant Response transaction cannot be modified or cancelled. Instead, the associated Grant Response record must be updated directly on the Grant Response Status Folder (GTRESF) or a user can create a new Grant Response transaction to update an existing record with a new response.

GTOP/GTOPR

The Grant Opportunity and Notification Statuses provide central tracking of the opportunities selected by the grant managers which should be pursued by the governmental entity and any Departments/Units that were notified about these opportunities. The Grant Opportunity (GTOP) transaction allows you to enter opportunity information and to specify the Grant Users who will be notified about the grant opportunity.

The Grant Opportunity transaction updates the Grant Opportunity Status Folder (GTOPSF) and the Grant Notification Status Folder (GTNTSF). If modifications are needed to the Grant Opportunity once the record has been added to the GTOPSF table you must create a Grant Opportunity Revision (GTOPR) transaction or update the record directly on the GTOPSF table, based on user authorization. If the **Grant Opportunity Status** field on the Grant Opportunity Status Folder has a value of *Canceled*, then a revision transaction cannot be created. You cannot delete a GTOPSF record using the Grant Opportunity Revision transaction, instead, an entire Grant Opportunity record must be deleted from the Status Folder directly. Refer to the "GT Transaction Type" section for additional information about grant revision transactions.

The GTOP and GTOPR transactions may be copied forward to create either a Grant Application or Grant Response transaction.

You can cancel a GTOP Transaction if the **Grant Opportunity ID** is not used on Grant Application or Award pages.

The GTOP/GTOPR transactions include the following tabs; only two of the tabs (Header and Grant Opportunity) must be completed to successfully submit the GTOP/GTOPR transaction to Final. In turn, Grant Managers can refrain from updating the Alert User Group or Grant Notification tabs if they solely want to track the opportunity without notifying Grant Users.

- Header
- Grant Opportunity
- Alert User Group
- Grant Notification

Tasks

The "Create Grant Opportunity" topic contains instructions on creating a grant opportunity using the GTOP transaction.

Header

The Header tab of the Grant Opportunity / Grant Opportunity Revision transactions allows you to specify general information about the Grant Opportunity.

› Required/Conditionally Required Fields

The following fields are required, and if left blank are automatically populated by CGI Advantage:

- Record Date
- Fiscal Year
- Period

The following fields are conditionally required based on site specific setup on the Transaction Control (DCTRL) table:

- Transaction Name
- Transaction Description

The **Reason for Modification** field is only required on *Revision* or *Cancellation* transactions. You are only allowed to insert/modify values in the **Reason for Modification** field on the Header of the Grant Opportunity cancellation transaction.

Grant Opportunity

The Grant Opportunity tab of the Grant Opportunity / Grant Opportunity Revision transactions provides detailed information on the opportunity. Information regarding the agency that is providing the funding for the Grant Opportunity and other dates and requirements regarding the Grant Opportunity are also tracked via this tab. You will receive an error upon validating or submitting the transaction if the transaction's Function is Cancellation and there is an Opportunity ID associated with a Grant Application or Grant Award Status Folder record.

› Required/Conditionally Required Fields

The following fields are required:

- Grant Opportunity ID
- Grant Program Name
- Total Available Funding
- Maximum Grant Award
- Minimum Grant Award
- Funding Agency
- Grant Type
- Funding Type
- Resolution Required
- Pre-Application Required
- Funding Instrument Type 1

The **Funding Agency** field is conditionally required based on the setting of the **GTOP_FUND_AGY_CTL** parameter on the Application Parameter (APPCTRL) table and the value in the **Grants Opportunity Source Detail** field.

Alert User Group

The Alert User Group tab of the Grant Opportunity / Grant Opportunity Revision transactions allows you to enter multiple **Alert User Group ID** records. All Grant Users associated with the selected **Alert User Group ID** are loaded to the Grant Notification tab when the **Load Alert User Group Template** action is selected. The system deletes all Grant Users associated with the old template and loads all the Grant users associated with the new template. The GTOP transaction permits multiple Alert User Groups per transaction.

Note: An error is received on **Validate** or **Submit** if there is a record on the Alert User Group tab, but the Grant Notification tab does not have at least one Grant User record associated with the selected **Alert User Group ID**.

This tab contains the following actions/links:

› Tab-level actions/links

- **Load Alert User Group Template** - This action loads all Grant Users associated with the selected **Alert User Group ID** to the Grant Notification tab.

Grant Notification

The Grant Notification tab of the Grant Opportunity / Grant Opportunity Revision transactions can be populated manually or Grant Users can be added to it by the **Load Alert User Group Template** action on the Alert User Group tab.

- Existing Grant User's Name and Email information can be modified directly on this page but these changes are not replicated to the Grant User (GRNTUSER) table.
- You can delete users from the grid if the user has not already entered a response on the Grant Response Status Folder (GTRESF). The Grant user is not deleted from the Grant User Group Template (GRNTTMPL) table.
- You can manually add new users to the grid; however, the new user is not added to the Grant User Group Template (GRNTTMPL) table.

This section does not contain any required fields; however, an error is received on **Validate** or **Submit** if there is a record on the Alert User Group tab, but the Grant Notification tab does not have at least one Grant User record associated with the selected **Alert User Group ID**. You can either select a user from the **Grant User** pick list, or you can manually enter the information (for example, Name, Department, Unit, and Email) without populating the **Grant User** field. If a user is selected from the **Grant User** pick list, then the **Name**, **Department**, **Unit** and **Email** are inferred from the Grant User (GRNTUSER) table.

› Response Due Date Calculation

The system automatically populates the **Response Due Date** field on the Grant Notification Status Folder (GTNTSF) based on the following calculation:

- **Response Due Date** = **Application Control Date** + **Grant Response Days** (specified on the System Options (SOPT) table)
- You can change the **Response Due Date** after it is populated by the system.
- If no value is entered for the **Grant Response Days** field on the System Options (SOPT) table, then **Response Due Date** becomes a required field.

› Notification Message

You can select the message you want sent to the user from the **Grant Message ID** pick list field. If this field is left blank a default message is sent. You should select the **Notify?** field for all users that you want to receive a notification about the Grant Opportunity. When a new Alert User Group Template is loaded, all **Notify?** fields are set to *Yes*. If you click the **Unselect All to Notify** tab-level action, then all **Notify?** fields are set to *No*. If you click the **Select All to Notify** tab-level action, all **Notify?** fields are set to *Yes*. The Notification batch process will be triggered once the transaction is submitted to Final.

The system only notifies the Grant Users that have the **Notify?** field set to *Yes*. The potential Grant Applicants that are notified receive an email notification with a link to access the Grant Opportunity directly within the system and a .PDF file attachment of the Grant Opportunity. On completion of the Notify Grant Opportunity batch process, an Alert is sent to the person who triggered the notification and the current Application Date is populated in the **Notification Sent** field for each successfully notified potential applicant.

GTRE

The Grant Response (GTRE) transaction allows a Grant User to indicate their decision of whether or not to apply for a specific Grant Opportunity. Final versions of the Grant Response transaction update the Grant Response Status Folder (GTRESF).

Final versions of the Grant Response transaction cannot be modified or cancelled. Instead, the associated Grant Response record must be updated directly on the Grant Response Status Folder (GTRESF) or a user can enter in a new Grant Response transaction to update an existing record with a new response.

The Grant Response (GTRE) transaction contains the following tabs. Both tabs contain required fields to successfully submit the GTRE transaction to *Final*.

- Header
- Grant Response

Tasks

The "Respond to Grant Notification" section contains instructions on responding to a grant opportunity using the Grant Response (GTRE) transaction.

Header

The Header tab of the Grant Response transaction allows you to specify general information about the transaction and the **Grant Opportunity ID**, for which the Grant Response is associated.

› Required/Conditionally Required Fields

The following fields are required, and if left blank are automatically populated by CGI Advantage:

- Record Date
- Fiscal Year
- Period
- Grant Opportunity ID

The following fields are conditionally required based on site specific setup:

- Transaction Name
- Transaction Description

Grant Response

The Grant Response tab of the Grant Response transaction allows users to enter responses for one or more Grant Users by selecting notified users within their same Department and Unit (Unit is optional) from the **Grant User** pick list in the Response Information section. On a new Grant Response transaction, the **Grant User** pick list will solely display notified users from the **Alert User Group IDs** associated with a particular Grant Opportunity and within the user’s Department and Unit as established on the Security

User (SCUSER) table in the Advantage Administration application. In order to respond for those Grant Users originally notified, the user must select them from the **Grant User** picklist.

› Required/Conditionally Required Fields

The following fields are required:

- Department
- Decision

The **Decision** field allows the selected Grant User to record his/her decision regarding whether to apply or not to apply for the Grant Opportunity. If *Not Apply* is selected, then the reason for not applying must be entered in the **Reason Declined** field.

If the **Grant User** field is populated, then the following fields are required and are inferred from the Grant User table based on the **Grant User** selected:

- Email
- Name
- Unit

GTAP/GTAPR

The Grant Application (GTAP) transaction allows a Grant User to enter an application for a specific Grant Opportunity. The Grant Application transaction can be created via the **Copy Forward** button on Grant Opportunity, Grant Opportunity Revision, and Grant Response transactions or it can be created via the Transaction Catalog.

The Grant Application transaction updates the Grant Application Status Folder (GTAPSF). If modifications are needed to the Grant Application once the record has been added to the GTAPSF table you must create a Grant Application Revision (GTAPR) transaction or update the record directly on the GTAPSF table, based on user authorization. You cannot delete a Status record using the Grant Application Revision transaction. In this case, an entire Application record must be deleted from the table directly. When a Grant Application is deleted, any records associated with the Grant Application also get deleted (that is, Grant Legislative Bodies, Partnering Organizations, Funding Allocation, Application Dates, and Alert User Groups). Refer to the "GT Transaction Type" section for additional information about grant revision transactions.

The GTAP/GTAPR transactions contain the following tabs; only 2 of the tabs (Header and Grant Application) must be completed to successfully submit the GTAP transaction to *Final*.

- Header
- Opportunity
- Grant Application
- Application Dates
- Application Alert User Groups
- Partnering Organizations

- Partnering Organization Dates
- Partnering Organization Alert User Groups
- Legislative Bodies
- Funding Allocation

Header

The Header tab of the Grant Application and Grant Application Revision transactions allows you to specify general information about the Grant Application transaction.

The Header tab of the GTAP transaction contains the same sections and fields as the Header tab on the GTOP transaction. Refer to the "Header" tab under the "Grant Opportunity (GTOP)" topic for more information.

Opportunity

The Opportunity tab of the Grant Application and Grant Application Revision transactions provides detailed information on the opportunity. The purpose of including the opportunity information on the Grant Application transaction is to facilitate direct entry of an application without having to separately create a Grant Opportunity transaction. In turn, users can create a Grant Application transaction without an existing Grant Opportunity record; however, they must enter a new opportunity in this tab. If the Grant Opportunity already exists on the Grant Opportunity Status Folder (GTOPSF), then the Opportunity tab must be left blank or the user can select the **Load Opportunity** action in the Grant Application tab after entering in the required Grant Opportunity ID field. This action will populate the Opportunity tab with the information related to that existing opportunity. Once this action is taken, the Opportunity tab is no longer editable as the details regarding that existing opportunity are displayed for informational purposes only. The opportunity information will be current as of the time that the Load Opportunity action was taken. The information is not automatically updated each time the GTAP/GTAPR transaction is viewed or edited. If necessary, the user can perform the Load Opportunity action again in the GTAP transaction to update the Opportunity tab.

The Opportunity tab of the Grant Application and Grant Application Revision transactions contains the same fields as the Grant Opportunity tab on the GTOP transaction. Refer to the "Grant Opportunity" topic under the "GTOP/GTOPR" topic for more information.

Grant Application

The Grant Application tab on the Grant Application and Grant Application Revision transactions provides information such as the **Grant Opportunity ID** that the Grant Application is referencing and the unique **Grant ID** for the application. The Grant ID field is used to uniquely distinguish each application. Once a Grant ID is entered, it is used throughout the lifecycle of that application (for example, on the award, amendment, etc.). A user can create a unique **Grant ID** or the system can auto-generate one for the user.

You cannot create a Grant Application for a Grant Opportunity that is past the application Due Date for that opportunity. The system does permit multiple applications for a specific opportunity but a warning message is issued if a Grant Application already exists for the specified Department and Unit (Unit is optional).

› Required/Conditionally Required Fields

The following fields are required:

- Grant Opportunity ID
- Department
- Grant ID
- Grant ID Name
- Funding Request
- Contact Name
- Contact Phone
- Contact Email

The Grant Application tab contains the following actions/links:

› Tab-level actions/links

- **Load Date Definition Template** - This action loads the dates associated with the template selected in the Date Definition Template ID to the Application Dates tab.
- **Load Opportunity** – This action loads the information associated with the opportunity specified in the Grant Opportunity ID field to the Opportunity tab.

Application Dates

The Application Dates tab on the Grant Application and Grant Application Revision transactions displays the key dates associated with the Grant Application. The Application Dates can be added one record at a time on this tab or the dates can be loaded from a template. The template must be specified in the **Date Definition Template ID** field on the Grant Application tab of this transaction. The **Date Definition Template ID** is defaulted based upon the **Department** of the user (as defined in the Advantage Admin application on the SCUSER table) entering the Application. If the **Department** is not specified for the user, it will use the **Department** of *ALL* to default the **Date Definition Template ID**. To load the dates associated with the template, the **Load Date Definition Template** action must be selected on the Grant Application tab.

› Required/Conditionally Required Fields

Some of the fields on this tab are display only and some allow changes to be made. The rules are established by **Date Code** on the Grant Date Definition (GRNTDEF) table and by template on the Grant Date Definition Template Detail (GRNTDET) table. A record does not have to be added to this section to successfully submit the Grant Application record. However, the following field is required, if a record is added to this tab:

- Grant Date Code

Application Alert User Groups

The Application Alert User Groups tab on the Grant Application and Grant Application Revision transactions allows you to indicate the users that you want to receive an alert about specific application dates. This tab should only be updated if users will be alerted about impending dates. You can select a user group template from the **Alert User Group ID** pick list on the Application Dates tab, and then click the **Load Alert User Group Template** action to load all users that belong to that template. You can manually add Grant Users, delete users loaded from the template, and you can modify the email address for Grant Users added from the template. However, any modifications made to the records in this grid will not update the Grant User Group Template table.

› Required/Conditionally Required Fields

  A record does not have to be added to this section to successfully submit the GTAP transaction. However, the following field is required, if a record is added to this tab:

  - Name
  - Email

Partnering Organizations

The Partnering Organization tab on the Grant Application and Grant Application Revision transactions allows you to indicate all Partnering Organizations associated with the Grant Application. This tab tracks applications that are submitted with other community-based organizations or when any collaboration needs to take place between two or more entities. If you indicate a value in the **Date Definition Template ID** field, then you must select the **Load Date Definition Template** action to load the dates to the Partnering Organization Dates tab.

› Required/Conditionally Required Fields

  A record does not have to be added to this tab to successfully submit the GTAP transaction. However, the following fields are required, if a record is added to this tab:

  - Partner Name
  - Contact Name
  - Email
  - Phone

The Partnering Organizations tab contains the following actions/links:

› Tab-level actions/links

  - **Load Date Definition Template** - This action loads the dates associated with the template selected in the Date Definition Template ID to the Partnering Organization Dates tab.

Partnering Organization Dates

The Partnering Organization Dates tab on the Grant Application and Grant Application Revision transactions lists all of the dates that are required for the Partnering Organization. To load the dates associated with the template, the **Load Date Definition Template** action must be selected on the Partnering Organizations tab. Please refer to the "Application Dates" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAP transaction. However, the following field is required, if a record is added to this tab:

- Grant Date Code

Partnering Organization Alert User Groups

The Partnering Organization Alert User Groups tab on the Grant Application and Grant Application Revision transactions allows you to indicate the users that you want alerted about impending partnering organization dates. Please refer to the "Application Alert User Groups" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAP transaction. However, the following field is required, if a record is added to this tab:

- Name
- Email

Legislative Bodies

The Legislative Bodies tab on the Grant Application and Grant Application Revision transactions allows you to indicate all Grant Legislative Bodies associated with the Grant Application. This tab tracks applications that are submitted in the various governmental branches/jurisdictions. All Grant Legislative Bodies must be established on the Grant Legislative Body (GRNTLB) table.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAP transaction. However, the following fields are required, if a record is added to this tab:

- Legislative Body ID
- Elected Official Name
- District Number
- Legislative Body District

Funding Allocation

The Funding Allocation tab of the on the Grant Application and Grant Application Revision transactions allows you to indicate all Funding Allocations associated with the Grant Application. Funding Allocation records track the requested, awarded and amended amounts associated with a specific governmental branches/jurisdictions or Service Planning Area (SPA). A particular funding allocation record associated with an application is also shared with an award and amendment record because the key information (for example, SPA) does not change throughout the grant lifecycle whereas a user can solely input the value associated with that status. For example, a user can only update the **Awarded Amount** when accessing a Funding Allocation record from the Grant Award Status Folder.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAP transaction. However, the following fields are required, if a record is added to this tab:

- Supervisorial District or SPA ID
- Period of Performance From
- Period of Performance To

GTAW/GTAWR

The Grant Award (GTAW) transaction allows creation of the grant award information and provides central tracking on the status of the award acceptance approval process and miscellaneous award requirements. The Grant Award transaction can be created via the **Copy Forward** button on the Grant Application transaction or it can be created via the Transaction Catalog.

The Grant Award transaction updates the Grant Award Status Folder (GTAWSF). If modifications are needed to the Grant Award once the record has been added to the GTAWSF table you must create a Grant Award Revision (GTAWR) transaction or update the record directly on the GTAWSF table, based on user authorization. A Grant Award Revision transaction cannot be modified or canceled. In the case of modifications, a new Grant Award Revision transaction should be created. In the case of deletions, any Grant Award that must be deleted from the system must be performed directly on the Grant Award Status Folder. Refer to the "GT Transaction Type" section for additional information about grant revision transactions.

The System will not allow users to delete a Grant Award record when a Grant Amendment record with same **Grant ID** exists. When a Grant Award record is deleted, all children records except Grant Legislative Bodies and Funding Allocation records are deleted. When the Grant Award is deleted, the **Opportunity Status** field on the Grant Opportunity Status Folder (GTOPSF) is updated to *Canceled*.

The GTAW/GTAWR transactions contain the following tabs; only 2 of the tabs (Header and Grant Award) must be completed to successfully submit the transactions to Final.

- Header
- Grant Award
- Award Dates
- Award Alert User Groups
- Program Management
- Program Details
- Program Management Dates
- Program Management Alert User Groups
- Reporting
- Reporting Dates
- Reporting Alert User Groups

- Legislative Bodies
- Funding Allocation

Header

The Header tab of the GTAW transaction allows you to specify general information about the Grant Award transaction.

The Header tab of the GTAW transaction contains the same fields as the Header tab on the GTOP transaction. Refer to the "Header" topic under the "GTOP/GTOPR" topic for more information.

Grant Award

The Grant Award tab on the Grant Award and Grant Award Revision transactions captures the Grant Award information. Grant Award Revision transactions must use an existing **Grant Opportunity ID** and **Grant ID** value, a new value cannot be created and an existing value cannot be changed or deleted.

› Required/Conditionally Required Fields

The following fields are required:

- Grant ID
- Awarded Amount - This value cannot be changed on the Award Status Folder or the Award transaction after any Amendment has been posted. At that point it must be revised in the Grant Amendment.
- Award Notification Date
- Funding Instrument Type

The following field is required, if Funding Agency information is entered:

- Funding Agency

The Grant Award tab contains the following actions/links:

› Tab-level actions/links

- **Load Date Definition Template** - This action loads the dates associated with the template to the Award Dates tab.

Award Dates

The Award Dates tab on the Grant Award and Grant Award Revision transactions lists all of the dates that are associated with the award record. Please refer to the "Application Dates" tab to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAW transaction. However, the following field is required, if a record is added to this tab:

- Grant Date Code

Award Alert User Groups

The Award Alert User Groups tab on the Grant Award and Grant Award Revision transactions allows you to indicate the users that you want alerted about specific award dates. Please refer to the GTAP "Application Alert User Groups" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAW transaction. However, the following fields are required, if a record is added to this tab:

- Name
- Email

Program Management

The Program Management tab on the Grant Award and Grant Award Revision transactions facilitates the establishment of high level Cost Accounting COA structure data and matching percentages within an award of the Grant Lifecycle Management subsystem. A Project Manager can then trigger a draft Cost Accounting Setup (CAS) transaction which is used to establish the COA data in the Cost Accounting subsystem.

› Major Program Details

This section allows you to associate basic Cost Accounting elements (for example, Major Program) with the Grant Award. If the **Perform Cost Accounting Updates** field is *Yes*, then upon the transaction being submitted to a **Phase** of *Final*, a Cost Accounting Setup (CAS) transaction, with a **Phase** of *Draft*, will be created automatically. You may also select existing Major Programs which infers the **Major Program Name**, **Major Program Description**, and **Split Type** from the Major Program table. This information will be populated on the Major Program and PPC tabs of the CAS transaction upon creation. The system will infer the Grant ID to the appropriate tab (Major Program, Program, Program Period, or Funding Line) on the generated CAS transaction based on the value selected for the **Grant Tracked As A** field in the Grant Award tab.

Once a CAS transaction has been generated for a Program Management record, the system will not allow another CAS transaction to be automatically created unless the referenced CAS transaction has been discarded (while still in a Phase of Draft.) After the initial CAS transaction has been discarded, you will need to submit one revision transaction to set the **Perform Cost Accounting Updates** field to *No*, and then submit a second Grant Award Revision transaction (with the field then changed to *Yes*) to generate a new CAS transaction (or you can update the table directly if you have security rights). Any changes made to the Program Management records after a CAS transaction has been created will not update the CAS transaction and will have to be made to the Cost Accounting tables directly.

Additionally, the system will not allow the **Perform Cost Accounting Updates** field to be set to *No* if the **Generated Transaction ID** field is populated and therefore the referenced transaction has not been discarded. Instead, an error is issued and the field will revert to *Yes*.

Finally, the system will not allow you to delete a Program Management record if a Cost Accounting Setup (CAS) transaction has already been generated. Provided a CAS transaction has not been created, then the Program Management record will be deleted along with any child records.

This tab does not contain any required fields.

- Matching

  This section allows Matching Details to be created, modified, or deleted. The matching details information can be created and modified but information in the section does not impact the Cost Accounting Setup (CAS) transaction. Any matching information associated with the reimbursement of a grant (that is, funding profile information) must be manually updated in the CAS transaction after it has been generated in order to impact the Cost Accounting subsystem.

The Program Management tab contains the following actions/links:

- Tab-level actions/links

  - **Load Date Definition Template** - This action loads the dates associated with the template specified in the **Date Definition Template ID** field to the Program Management Dates tab.

Program Details

The Program Details tab on the Grant Award and Grant Award Revision transactions allows you to assign a new Program Code within the identified Major Program and build the relationship to any existing Phases. If you enter an existing Program code, then the system infers the Program Name and Program Description from the Program (PROG) table. This information is populated on the Program and Program Phase tabs of the Cost Accounting Setup transaction upon creation. The same Program can be used multiple times as long as they are associated with a different Phase.

Program Management Dates

The Program Management Dates tab on the Grant Award and Grant Award Revision transactions lists all of the dates that are associated with the Program Management record. Each Program Management record can have different dates. Please refer to the GTAP/GTAPR “Application Dates” topic to learn more about this functionality.

- Required/Conditionally Required Fields

  A record does not have to be added to this section to successfully submit the GTAW transaction. However, the following field is required, if a record is added to this tab:

  - Grant Date Code

Program Management Alert User Groups

The Program Management Alert User Groups tab on the Grant Award and Grant Award Revision transactions allows you to indicate the users that you want alerted about specific program management dates. Please refer to the GTAP/GTAPR "Application Alert User Groups" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAW transaction. However, the following fields are required, if a record is added to this tab:

- Name
- Email

Reporting

The Reporting tab on the Grant Award and Grant Award Revision transactions allows you to view or create reporting schedules that remind the Project Manager of when information should be reported internally or back to the grantor. This functionality supports the management of grants by ensuring that the Grant User is reminded appropriately of upcoming due dates.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAW transaction. However, the following fields are required, if a record is added to this tab:

- Grant Date Code
- Alert User Group ID
- Report Type
- Frequency
- Reporting Start Date or Reporting End Date

This tab contains the following actions/links:

› Tab-level actions/links

- **Load Reporting Dates** - This action loads reporting dates to the Reporting Dates tab, if Grant Date Code, Report Type, Frequency, Reporting Start Date, and Reporting End Date fields are populated.

Reporting Dates

The Reporting Dates tab on the Grant Award and Grant Award Revision transactions lists all of the impending due dates that facilitate reminding the Project Manager of the grant's internal or external reporting requirements. This is where the **Due Date** and **Completion Date** are entered for each reporting requirement. This tab is automatically populated if, on the Reporting tab, if a value is entered in the **Grant Date Code**, **Report Type**, **Frequency**, **Reporting Start Date**, **Reporting End Date** fields, and the **Load Reporting Dates** link is selected.

You may change the **Grant Date Code**, **Frequency**, **Reporting Start Date**, or **Reporting End Date**. If these values are changed on the Reporting tab and then the **Load Reporting Dates** link is clicked, then the system will delete all existing system-generated date records and associated Grant Users for each Alert User Group for those records which do not have the **Completion Date** populated. The system will then reload new reporting Dates, Alert User Groups and Grant Users based on the new values specified in aforementioned fields. (Although Due Date is not part of the key in other status dates, it is for Reporting Schedules, along with Grant Date Code and Section.) However, the system will not delete records that were manually inserted on the transaction; you will need to manually delete such records, if required.

If there is not at least one date record associated with the reporting schedule, the system will issue a warning upon validating or submitting the transaction.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAW transaction. However, the following field is required, if a record is added to this tab:

- Grant Date Code

This tab contains the following actions/links:

› Tab-level actions/links

- **Load Alert User Group Template** - This action loads all user associated with the user group template in the Alert User Group ID field to the Reporting Alert User Group tab.

Reporting Alert User Groups

The Reporting Alert User Groups tab on the Grant Award and Grant Award Revision transactions allows you to indicate the users that you want alerted about impending reporting schedule due dates. Please refer to the GTAP/GTAPR "Application Alert User Groups" tab to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAW transaction. However, the following fields are required, if a record is added to this tab:

- Name
- Email

Legislative Bodies

The Legislative Bodies tab on the Grant Award and Grant Award Revision transactions allows you to indicate all Grant Legislative Bodies associated with the Grant Application, Award, and Amendment. This tab tracks the various governmental branches/jurisdictions within the Grant Award. All Grant Legislative Bodies must be established on the Grant Legislative Body (GRNTLB) table prior to being added to the transaction.

Legislative Body information associated with the Grant Award transaction can either be inferred from the Grant Legislative Bodies page for the identified **Grant ID** or from the Grant Legislative Body (GRNTLB) reference table. Inferring information from the Grant Legislative Bodies page will only occur if the Grant Application Status Folder has identified Legislative Body records for the specified **Grant ID**. In turn, the Legislative Body records associated with the Grant Application will be inferred into the Grant Award transaction. If no records are associated with the Grant Application then the information is inferred onto the Grant Award transaction from the Grant Legislative Body (GRNTLB) reference table. Please refer to the GTAP/GTAPR "Legislative Bodies" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAW transaction. However, the following fields are required, if a record is added to this tab:

- Legislative Body ID
- Elected Official Name
- District Number
- Legislative Body District

Funding Allocation

The Funding Allocation tab on the Grant Award and Grant Award Revision transactions allows you to indicate all Funding Allocations associated with the Grant Application, Award, and Amendment.

Funding Allocation information associated with the Grant Award transaction can be inferred from the Funding Allocation page for the identified Grant ID. Inferring information from the Funding Allocation page will only occur if the Grant Application Status Folder has identified Funding Allocation records for the specified Grant ID. In turn, the Funding Allocation records associated with the Grant Application will be inferred into the Grant Award transaction. Please refer to the GTAP/GTAPR "Funding Allocation" topic to learn more about this functionality

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAW transaction. However, one of the following fields is required, if a record is added to this tab:

- Supervisorial District or SPA ID

GTAM/GTAMR

The Grant Amendment (GTAM) transaction allows a Grant User to enter an amendment for a specific Grant Award. The Grant Amendment Status provides central tracking of amendment(s) to a previously awarded grant. The Grant Amendment transaction can be created via **Copy Forward** on Grant Award and Grant Award Revision transactions or it can be created via the Transaction Catalog.

The Grant Amendment transaction updates the Grant Amendment Status Folder (GTAMSF). If modifications are needed to the Grant Amendment once the record has been added to the GTAMSF table you must create a Grant Amendment Revision (GTAMR) transaction or update the record directly on the GTAMSF table, based on user authorization. Grant Amendment Revision transactions must use an existing **Grant Opportunity ID**, **Grant ID** and **Amendment Number**, a new value cannot be created and an existing value cannot be changed or deleted. You cannot delete a Status record using the Grant

Amendment Revision transaction. In this case, an entire Amendment record must be deleted from the Status Folder directly. Refer to the "GT Transaction Type" section for additional information about grant revision transactions.

The Grant Amendment (GTAM) Transaction Code contains the following tabs; only 2 of the tabs (Header and Grant Amendment) must be completed to successfully submit the GTAM transaction to Final.

- Header
- Grant Amendment
- Amendment Dates
- Amendment Alert User Groups
- Reporting
- Reporting Dates
- Reporting Alert User Groups
- Legislative Bodies
- Funding Allocation

Header

The Header tab on the Grant Amendment and Grant Amendment Revision transactions allows you to specify general information about the Grant Amendment transaction.

The Header tab of the Grant Amendment and Grant Amendment Revision transactions contains the same sections and fields as the Header tab on the GTOP/GTOPR transaction. Refer to the "Header" topic under the "GTOP/GTOPR" topic for more information.

Grant Amendment

The Grant Amendment tab on the Grant Amendment and Grant Amendment Revision transactions provides information on the Grant Amendment. The referencing information from the Grant Award is inferred to this tab.

› Amount Calculations

> The system calculates a **Total Amended Amount** upon Submit or Validate by adding the **Awarded Amount** to the current **Amendment Amount** plus any Prior Amendment records. The **Prior Amendment** field is the sum total of all previous **Amendment Amounts** (Amendment Amounts that were recorded before the current record), for that particular Grant ID, in the Grant Amendment Status Folder. The total of all Amended Amounts within the particular Grant ID in the Funding Allocation tab should equal the **Total Amended Amount** field upon validating or submitting the transaction, otherwise a warning will display.

› Required/Conditionally Required Fields

- Grant ID, Amendment Number, and at least one **Amendment Type** option needs to be selected to successfully submit the GTAM transaction.
    - When the **Dollar Value** option is set to *Yes*, then you have to enter a value in the **Amendment Amount** field.
    - When the **End Date** option is set to *Yes*, then you have to enter a value in the **Revised Funding Period From** and **Revised Funding Period To** fields.
    - When the **Scope Change**, **Termination**, **Return of Funding** or **Other options** are set to *Yes*, then you have to enter a value in the **Comments** field.
- The **Amendment Number** cannot be changed once the transaction is either validated or submitted.

Amendment Dates

The Amendment Dates tab on the Grant Amendment and Grant Amendment Revision transactions lists all of the dates that are associated with the amendment record. Please refer to the GTAP/GTAPR "Application Dates" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAM transaction. However, the following field is required, if a record is added to this tab:

- Grant Date Code

Amendment Alert User Groups

The Amendment Alert User Groups tab on the Grant Amendment and Grant Amendment Revision transactions allows you to indicate the users that you want alerted about specific amendment dates. Please refer to the GTAP/GTAPR "Application Alert User Groups" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAM transaction. However, the following fields are required, if a record is added to this tab:

- Name
- Email

This tab contains the following actions/links:

› Tab-level actions/links

- **Load Alert User Group Template** - This action loads all users associated with the User Group template specified in the Alert User

Guide ID field on the Grant Amendment tab to the Amendment Alert User Groups tab.

Reporting

The Reporting tab on the Grant Amendment and Grant Amendment Revision transactions contains the same sections and fields as the Reporting tab on the GTAW transaction. Refer to the "Reporting" topic under the "GTAW/GTAWR" topic for more information.

Reporting Dates

The Reporting Dates tab on the Grant Amendment and Grant Amendment Revision transactions contains the same sections and fields as the Reporting Dates tab on the GTAW transaction. Refer to the "Reporting Dates" topic under the "GTAW/GTAWR" topic for more information.

Reporting Alert User Groups

The Reporting Alert User Groups tab on the Grant Amendment and Grant Amendment Revision transactions contains the same sections and fields as the Reporting Alert User Groups tab on the GTAW transaction. Refer to the "Reporting Alert User Groups" topic under the "GTAW/GTAWR" topic for more information.

Legislative Bodies

The Legislative Bodies tab on the Grant Amendment and Grant Amendment Revision transactions contains the same sections and fields as the Legislative Bodies tab on the GTAW transaction. Refer to the "Legislative Bodies" topic under the "GTAW/GTAWR" topic for more information.

Funding Allocation

The Funding Allocation tab on the Grant Amendment and Grant Amendment Revision transactions allows you to indicate all Funding Allocations associated with the Grant Application, Award, and Amendment. Please refer to the GTAP/GTAPR "Funding Allocation" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTAM transaction. However, one of the following fields is required, if a record is added to this tab:

- Supervisorial District or SPA ID

GTCO/GTCOR

The Grant Close-Out/Audit (GTCO) transaction allows for the auditing and closing of a Grant. This transaction allows the Grant Administrator or Project Manager to set up reminder dates for upcoming Audits and track audit information as well as actually closing the grant. The GTCO can be created via **Copy Forward** from the Grant Award or from the transaction Catalog.

The Grant Close-Out/Audit transaction updates the Grant Close-Out/Audit Status Folder (GTCOSF). If modifications are needed to the Grant Close-Out/Audit once the record has been added to the GTCOSF table you must create a Grant Close-Out/Audit Revision (GTCOR) transaction or update the record directly on the GTCOSF table, based on user authorization. You cannot delete a Status record using the Grant Close-Out/Audit Revision transaction. In this case, an entire Grant Close-Out/Audit record must be deleted from the Status Folder directly. Refer to the "GT Transaction Type" section for additional information about grant revision transactions.

The Grant Close-Out/Audit (GTCO) transaction contains the following tabs; only 2 of the tabs (Header and Grant Close-Out/Audit) must be completed to successfully submit the GTCO transaction to Final.

- Header
- Grant Close-Out / Audit
- Grant Close-Out / Audit Dates
- Close-Out / Audit Alert User Groups

Header

The Header tab of the Grant Close-Out/Audit and Grant Close-Out/Audit Revision transactions allows you to specify general information about the Grant Close-Out/Audit.

The Header tab of the GTCO/GTCOR transactions contains the same sections and fields as the Header tab on the GTOP/GTOPR transaction. Refer to the "Header" topic under the "GTOP/GTOPR" topic for more information.

Grant Close-Out / Audit

The Grant Close-Out / Audit tab of the Grant Close-Out/Audit and Grant Close-Out/Audit Revision transactions allows the grant manager to capture the grant information and trigger the closing of the Grant.

The **Close Grant** check box, when checked, marks the associated Cost Accounting Chart of Accounts (COA) code(s) as *Inactive* by setting the **Active** check box to unchecked. In turn, the system uses the **Grant ID** of the Grant Close-Out/Audit record to locate the associated Funding Profile (via the Funding Line), Program Code(s), or Major Program Code(s) in that order and mark them as *Inactive*. Closing the grant updates the **Opportunity Status** to *Closed* for the particular Grant Opportunity ID on the Grant Opportunity Status Folder. Unselecting the **Close Grant** check box reverses the process noted above and updates the status to In-progress. There can only be one Grant ID record per Grant Close-Out/Audit transaction.

› Total Amended Amount

    The **Total Amended Amount** displays the sum of the **Awarded Amount** + **Prior Amendment** + **Amendment Amount**.

› Required/Conditionally Required Fields

    The following field is required:

    - Grant ID

This tab contains the following actions/links:

› Tab-level actions/links

- **Load Date Definition Template** - This action loads the dates associated with the template to the Grant Close-Out / Audit Dates tab.

Grant Close-Out / Audit Dates

The Grant Close-Out / Audit Dates tab of the Grant Close-Out/Audit and Grant Close-Out/Audit Revision transactions allows the Grant Administrator to set up a schedule of Audit Tasks with a due date of when audits need to be performed and sent to the Grantor. The Grant Administrator can assign an approver and alert a user group with next alert date and message. The audit dates have a place to track completion of the audit or close-out. Please refer to the GTAP/GTAPR "Application Dates" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTCO transaction. However, the following field is required, if a record is added to this tab:

- Grant Date Code

Close-Out / Audit Alert User Groups

The Close-Out Alert User Groups tab of the Grant Close-Out/Audit and Grant Close-Out/Audit Revision transactions allows you to indicate the users that you want alerted about specific audit or close-out dates. Please refer to the GTAP/GTAPR "Application Alert User Groups" topic to learn more about this functionality.

› Required/Conditionally Required Fields

A record does not have to be added to this section to successfully submit the GTCO transaction. However, the following fields are required, if a record is added to this tab:

- Name
- Email

Common Business Tasks

The following common business tasks can be accomplished using Grant Lifecycle Management:

- Create Grant Opportunity
- Notify Others about Grant Opportunity
- Respond to Grant Notification
- Create Grant Application
- Create Grant Award
- Make Adjustments to Grant Award
- Manage Grant Close-Out/Audits

Create Grant Opportunity

CGI Advantage allows you to create a Grant Opportunity using one of four methods:

- Grant Opportunity Status Folder (GTOPSF)
- Grant Opportunity (GTOP) transaction
- Available Opportunity Detail (GTAOD)
- Available Opportunity Summary (GTAOS)

For information on the Grant Opportunity Status Folder (GTOPSF), refer to the "Grant Opportunity Status Folder" topic. For information on the Grant Opportunity (GTOP) transaction, refer to the "Grant Opportunity (GTOP)" topic. For information on the Available Opportunity Detail (GTAOD) table, refer to the "Available Opportunity Detail" topic. For information on the Available Opportunity Summary (GTAOS) table, refer to the "Available Opportunity Summary" topic.

Create Grant Opportunity using GTOPSF

To track and create an identified Grant Opportunity using the Grant Opportunity Status Folder (GTOPSF), perform these steps:

1. Open the Grant Opportunity Status Folder (GTOPSF) page.
2. Insert a new line.
3. Complete the Grant Opportunity tab.

   The following fields are required:

   - Department
   - Grant Opportunity ID
   - Grant Program Name

- Total Available Funding
- Maximum Grant Award
- Minimum Grant Award.
- Funding Agency
- Grant Type
- Funding Type
- Funding Instrument Type
- Resolution Required
- Pre-application Required

4. Click **Save**.
5. If errors exist, fix the errors and repeat Step 4. If no errors exist, then the record is saved successfully.

Create Grant Opportunity using GTOP

To create an identified Grant Opportunity and notify potential Grant Applicants about the opportunity using the Grant Opportunity (GTOP) transaction, perform these steps:

1. Create a Grant Opportunity (GTOP) transaction using the Transaction Catalog.
2. Complete the Header tab.
    1. The following fields are required, and if left blank are automatically populated by CGI Advantage Financial: **Record Date**, **Fiscal Year**, and **Period**.
    2. The following fields are conditionally required based on site specific setup on the Transaction Control (DCTRL) table: **Transaction Name** and **Transaction Description**.
3. Complete the Grant Opportunity tab.

    The following fields are required:

    - Grant Opportunity ID
    - Grant Program Name
    - Total Available Funding
    - Maximum Grant Award
    - Minimum Grant Award
    - Funding Agency
    - Grant Type

- Funding Type
- Funding Instrument Type
- Resolution Required
- Pre-application Required

4. Complete the Alert User Group tab.
    1. Insert a new line.
    2. Enter or select a value in the **Alert User Group ID** field.
    3. Click **Load Alert User Group Template** to load all Grant Users associated with the selected Alert User Group ID.

    Note: This tab is not required to submit the GTOP transaction to Final.
5. Complete the Grant Notification tab.
    1. Expand the Grant Notification tab.
    2. Verify that at least one Grant User record associated with the selected Alert User Group ID is loaded.
    3. The system only notifies the Grant Users that have the **Notify?** field set to *Yes* in the grid. When a new Alert User Group Template is loaded, all **Notify?** fields are set to *Yes* for you. Set the **Notify?** field to *No* for any users that should not receive the notification.

    Note: This tab is not required to submit the GTOP transaction to Final.
6. Click **Validate** to validate for errors.
7. If errors exist, fix the errors and repeat Step 6. If no errors exist, then continue with Step 8.
8. Click **Submit** to submit the transaction.

Create Grant Opportunity using GTAOD

To create a Grant Opportunity transaction from the Available Opportunity Detail (GTAOD) table, perform these steps:

Note: Setup is required on DCTRL, APPCTRL and ADNT before the following steps can be performed. Refer to the “Creating Opportunity Transactions from GTAOD and GTAOS” topic for more information.

1. Open the Available Opportunity Detail (GTAOD) table.
2. Click the Search link.
    1. Select *No* for the **Include Forecasted Opportunities** field.
    2. Select *Yes* for the **Include Open Opportunities** field.
    3. Select *No* for the **Include Closed Opportunities** field.

   4. Select *No* for the **Include Archived Opportunities** field.
   5. Optionally select or enter values in one or more of the remaining search fields.
   6. Select **OK**. The records that match your search criteria are displayed in the grid on the GTAOD page.

   Note: For additional information on searching, refer to the "Searching for Opportunities on GTAOD and GTAOS" topic.

3. Select a desired record from the grid that does not have the **Grant Opportunity Transaction ID** populated.
4. Select the **Create Grant Opportunity Transaction** link. Result: A GTOP transaction is created for you and the referenced transaction information is updated in the grid and in the Grant Opportunity Transaction tab. Refer to the "Creating Opportunity Transactions from GTAOD and GTAOS" topic if errors occur and the GTOP transaction is not created.
5. If the OPPORTUNITY_DOC_SUBMIT parameter is set to *True* on the APPCTRL table, Advantage will attempt to validate and submit the transaction to Final. The Transaction Phase is updated on this table based on whether the transaction was submitted to Final or the transaction was rejected due to errors. If the Transaction Phase is updated to Final no other steps are required. Otherwise, continue with Step 6.
6. If errors exist or the OPPORTUNITY_DOC_SUBMIT parameter is set to *False* on the APPCTRL table you can access the GTOP transaction by selecting the transaction link in the Grant Opportunity Transaction ID column in the grid. Fix the errors on the GTOP transaction, if the transaction was Rejected. Validate and submit the transaction to Final.

Create Grant Opportunity using GTAOS

To create one or more Grant Opportunity transactions from the Available Opportunity Summary (GTAOS) table, perform these steps:

Note: Setup is required on DCTRL, APPCTRL and ADNT before the following steps can be performed. Refer to the "Creating Opportunity Transactions from GTAOD and GTAOS" topic for more information.

1. Open the Available Opportunity Summary (GTAOS) table from Page Search.
2. Enter search criteria into the search fields at the top of the table.
   1. Select *No* for the **Include Forecasted Opportunities** field.
   2. Select *Yes* for the **Include Open Opportunities** field.
   3. Select *No* for the **Include Closed Opportunities** field.
   4. Select *No* for the **Include Archived Opportunities** field.
   5. Optionally select or enter values in one or more of the remaining search fields.
   6. Select **Browse**. The records that match your search criteria are displayed in the grid on the GTAOS page.

Note: For additional information on searching, refer to the "Searching for Opportunities on GTAOD and GTAOS" topic.

3. Select the **Select Record for Grant Opportunity Transaction** check box for one or more desired records in the grid.

4. Select the **Create Grant Opportunity Transaction** link. Result: A GTOP transaction is created for each record selected, and the referenced transaction information is updated in the grid and in the Grant Opportunity Transaction tab on the GTAOD page. Refer to the "Creating Opportunity Transactions from GTAOD and GTAOS" topic if errors occur and the GTOP transaction is not created.

5. If the OPPORTUNITY_DOC_SUBMIT parameter is set to *True* on the APPCTRL table, Advantage will attempt to validate and submit the transactions to Final. The Transaction Phase is updated on the GTAOD page based on whether the transactions were submitted to Final or the transactions were rejected due to errors. If the Transaction Phase is updated to Final no other steps are required. Otherwise, continue with Step 6.

6. If errors exist or the OPPORTUNITY_DOC_SUBMIT parameter is set to *False* on the APPCTRL table, you can access the GTOP transactions by selecting the transaction links in the Grant Opportunity Transaction ID column in the grid on GTAOD. Fix the errors on the GTOP transaction, if the transaction was Rejected. Validate and submit the transaction to Final.

Notify Others about Grant Opportunity

To automatically notify potential grant applicants via e-mail about the opportunity that has been entered using the Grant Notification Status Folder (GTNTSF), perform these steps:

1. Open the Grant Notification Status Folder (GTNTSF) page.

2. Insert a new line.

3. Complete the Grant Notification tab.

    1. On the General Information subsection, the following field is required: **Grant Opportunity ID**.

    2. Select a value in the **Alert User Group ID** field.

4. Select **Save**.

5. Select the Load Alert User Group Template tab-level action.

    Note: This link will load all users associated with the **Alert User Group ID** template specified during Step 3 to the Alerted Users tab.

6. Select users to notify.

    Note: The system only notifies the Grant Users that have the **Notify?** field set to *Yes* in the grid. When a new Alert User Group Template is loaded, all **Notify?** fields are set to *Yes* for you. Set the **Notify?** field to *No* for any users that should not receive the notification.

7. Select **Save**.

8. Select the Notify link to initiate the Notification Batch Process.

Note: The current Application Date is populated in the **Notification Sent** field for each successfully notified potential applicant.

For information on the Grant Notification Status Folder (GTNTSF), refer to the "Grant Notification Status Folder" topic.

Note: You can also notify potential Grant Applicants about a Grant Opportunity using the Grant Opportunity (GTOP) transaction. Refer to the "Create Grant Opportunity" task for more information.

Respond to Grant Notification

CGI Advantage allows you to respond to a Grant Opportunity using one of 2 methods:

- Grant Response Status Folder (GTRESF)
- Grant Response (GTRE) transaction

To enter the decision on whether or not to apply for an opportunity using the Grant Response Status Folder (GTRESF), perform these steps:

1. Open the Grant Response Status Folder (GTRESF) page.
2. Insert a new line.
3. Enter the Grant User's response.
    1. The Responses tab lists the Grant Users that were notified about the selected Grant Opportunity. Insert a new line if you need to add a Grant User.
    2. Populate the **Decision** field each Grant User responding to the opportunity.
    3. If *Not Apply* is selected in the Decision field, then the reason for not applying must be entered in the **Reason Declined** field.
    4. The **Response Completion Date** is required, unless *No Response* is selected in the **Decision** field.
4. Click **Save**.
5. If errors exist, fix the errors and repeat Step 4. If no errors exist, then the record is saved successfully.

To enter the decision on whether or not to apply for an opportunity using the Grant Response (GTRE) transaction, perform these steps:

1. Create a Grant Response (GTRE) transaction using the Transaction Catalog.
2. Complete the Header tab.
    1. On the Opportunity Information section, the following field is required: **Grant Opportunity ID**.
    2. The following fields are required, and if left blank are automatically populated by CGI Advantage Financial: **Record Date**, **Fiscal Year**, and **Period**.

    3. The following fields are conditionally required based on site specific setup on the Transaction Control (DCTRL) table: **Transaction Name** and **Transaction Description**.

3. Complete the Grant Response tab.
    1. Expand the **Grant Response** tab.
    2. All users notified about the Grant Opportunity are listed. Insert a new line if you need to add a Grant User, so a response can be entered.
    3. On the Response Information section, if the **Grant User** field is populated, the following fields are required and are inferred from the Grant User table based on the Grant User selected: **Email**, **Name**, **Department**, and **Unit**.
    4. Populate the **Decision** field for the Grant User's response.
    5. If the **Decision** is *Not Apply*, then the reason for not applying must be entered in the **Reason Declined** field.
    6. If any decision is entered except for *No Response*, a **Response Completion Date** is required.
4. Click **Validate** to validate for errors.
5. If errors exist, fix the errors and repeat Step 4. If no errors exist, then continue with Step 6.
6. Click **Submit** to submit the transaction.

For information on the Grant Response Status Folder (GTRESF), refer to the "Grant Response Status Folder" topic. For information on the Grant Response (GTRE) transaction, refer to the "Grant Response (GTRE)" topic.

Create Grant Application

To manage and create a Grant Application using the Grant Application Status Folder (GTAPSF), perform these steps:

1. Open the Grant Application Status Folder (GTAPSF) page.
2. Insert a new line.
3. Complete the required information on the Grant Application tab.
    1. Grant Opportunity ID
    2. Department
    3. Grant ID
    4. Grant ID Name
    5. Funding Request
    6. Contact Name
    7. Contact Phone

    8. Contact Email

4. Optionally complete the Application Dates tab.

    1. The Application Dates can be added to the Application Dates tab one at a time or a **Date Definition Template ID** can be specified on the Grant Application tab. The **Load Date Definition Template** tab-level action loads the dates associated with the template to the Application Dates tab.

    2. A record does not have to be added to this tab to successfully save the Grant Application record. However, the following field is required, if a record is added to this tab: **Grant Date Code**.

5. Click **Save**.

6. If errors exist, fix the errors and repeat Step 5. If no errors exist, then the record is saved successfully.

For information on the Grant Application Status Folder (GTAPSF), refer to the "Grant Application Status Folder" topic. For information on the Grant Application (GTAP) transaction, refer to the "Grant Application (GTAP)" topic.

Create Grant Award

To track and create a Grant Award using the Grant Award Status Folder (GTAWSF), perform these steps:

1. Open the Grant Award Status Folder (GTAWSF) page.

2. Insert a new line.

3. Complete the Grant Award tab.

   Populate the following fields:

    - **Grant ID**

    - **Awarded Amount** – This cannot be changed on the Award Status Folder or the Award transaction after any Amendment has been posted. At that point, it must be revised via a Grant Amendment.

    - **Award Notification Date**

    - **Funding Instrument Type**

    - **Funding Agency** - This information is inferred from the Grant Opportunity; however, it can be modified on this tab. Note: The Opportunity Status maintains the original Funding Agency whereas the Award Status stores the updated Funding Agency. There is a pick list that infers the contact information and address information from the Billing Contact Address associated with the Customer record. Updated contact information for the Funding Agency is not updated in the Grant Opportunity.

4. Optionally complete the Award Dates tab.

    - The Award Dates can be added to the Award Dates tab one at a time or a **Date Definition Template ID** can be specified on the Grant Award tab. The **Load Date**

Definition Template action loads the dates associated with the template to the Award Dates tab.

- A record does not have to be added to this tab to successfully save the Grant Award record. However, the following field is required, if a record is added to this tab: **Grant Date Code**.

5. Click **Save**.
6. If errors exist, fix the errors and repeat Step 5. If no errors exist, then the record is saved successfully.

For information on the Grant Award Status Folder (GTAWSF), refer to the "Grant Award Status Folder" topic. For information on the Grant Award (GTAW) transaction, refer to the "Grant Award (GTAW)" topic.

Make Adjustments to Grant Award

To manage and make adjustments to the Grant Award, create a Grant Amendment using the Grant Amendment Status Folder (GTAMSF), perform these steps:

1. Open the Grant Amendment Status Folder (GTAMSF) page.
2. Insert a new line.
3. Complete the Grant Amendment tab.
   - Grant ID
   - At least one of the Amendment Type options needs to be selected to successfully save an Amendment record.
     - When the Dollar Value or Return of Funding option is set to *Yes*, then you have to enter a value in the Amendment Amount field.
     - When the End Date option is set to *Yes*, then you have to enter a value in the Revised Funding Period From and Revised Funding Period To fields.
     - When the Scope Change, Termination, Return of Funding or Other option is set to *Yes*, then you have to enter a value in the Comments field.
   - Amendment Number
4. Click **Save**.
5. If errors exist, fix the errors and repeat Step 4. If no errors exist, then the record is saved successfully.

For information on the Grant Amendment Status Folder (GTAMSF), refer to the "Grant Amendment Status Folder" topic. For information on the Grant Amendment (GTAM) transaction, refer to the "Grant Amendment (GTAM)" topic.

Manage Grant Close-Out/Audits

To track the grant audit process and to mark the grant closed using the Grant Close-Out/Audit Status Folder (GTCOSF), perform these steps:

1. Open the Grant Close-Out/Audit Status Folder (GTCOSF) page.
    - The following field is required: **Grant ID**.
    - The **Grant Opportunity ID, Grant Program Name, Grant ID, Grant ID Name, Department, Department Name**, and **Total Amended Amount** fields are inferred from the Grant Opportunity and Grant Award information. The inferred fields cannot be deleted or changed.
    - The **Total Amended Amount** displays the sum of the **Awarded Amount** + **Prior Amendment** + **Amendment Amount**. A **Date Definition Template ID** can be assigned on this tab.
    - The **Close Grant** check box, when checked, marks the associated Cost Accounting Chart of Accounts (COA) codes(s) as inactive by setting the Active field to *No*. In turn, the system uses the **Grant ID** of the Grant Close-Out/Audit record to locate the associated Funding Profile (via the Funding Line), Program Code(s), or Major Program Code(s) in that order and mark them as Inactive.
    - Closing the grant, updates the Opportunity Status to *Closed* for the particular Grant Opportunity ID on the Grant Opportunity Status Folder. Unselecting the Close Grant check box reverses the process noted above and updates the status to *In-progress*. There can only be one Grant ID record per Grant Close-Out/Audit transaction.
2. Insert a new line.
3. Complete the Grant Close-Out Audit tab.
4. Click **Save**.
5. If errors exist, fix the errors and repeat Step 4. If no errors exist, then the record is saved successfully.

For information on the Grant Close-Out/Audit Status Folder (GTCOSF), refer to the "Grant Close-Out/Audit Status Folder" topic. For information on the Grant Close-Out/Audit (GTCO) transaction, refer to the "Grant Close-Out/Audit (GTCO)" topic.

Inquiries

This topic includes all of the inquiries used in the Grant Lifecycle Management subsystem, listed alphabetically.

Inquiry Name	Page Code	Description
Grant Lifecycle Management Summary	GRNTSUM	Displays the summary of grant information for the entire Grant lifecycle.

Grant Lifecycle Management Summary

The Grant Lifecycle Management Summary inquiry displays the summary of grant information for the entire grant lifecycle. It allows the system to display high-level information regarding a particular Grant Opportunity all the way to Close-out/Audit. It displays one record per **Opportunity ID** and **Grant ID** combination. You can search by **Grant Opportunity ID**, **Grant ID**, **Grant ID Name**, and **Opportunity Status**.

The following tabs can be viewed when GRNTSUM is accessed.

- Opportunity Information
    - Displayed fields are inferred from the Grant Opportunity Status Folder (GTOPSF).
- Notification/Response Information
    - The Total Number of Notifications, Apply, Not Apply, No Response, and N/A fields displayed in Notification/Response Information tab are inferred from Grant Response Status Folder (GTRESF).
    - The Latest Notification Sent field in the Notification/Response Information tab displays the date of latest notification sent for a particular opportunity.
- Application Information
    - The fields displayed in Application Information tab are inferred from Grant Application Status Folder (GTAPSF)
- Award Information
    - The fields displayed in Award Information tab are inferred from the Grant Award Status Folder (GTAWSF).
- Amendment Information
    - The fields displayed in Amendment Information tab are inferred from Grant Amendment Status Folder (GTAMSF). Amendment Number,

Amendment Status, and Amendment Approved/Denied fields display the values of the most recent amendment record for the particular Grant ID.

- The Amendment Amount is the Total Amended Amount value in the most recent amendment record for the particular Grant ID.

› Close-Out/Audit Information

- The Grant Closed field is set based on the Close Grant field in the Close-out/Audit Status Folder (GTCOSF). If the Close Grant field is checked, then the Grant Closed field is also *Yes;* otherwise, the value is *No*.

Advanced - Setup

The Grant Lifecycle Management subsystem requires setup on Grants specific tables and it requires setup in other areas of CGI Advantage Financial.

- System Configuration
- Grants Setup Tables

System Configuration

This topic provides the system-wide tables that need set up for the Grant Lifecycle Management subsystem:

- Application Parameter
- System Options

Application Parameter

Although officially listed as an Infrastructure table, the Application Parameter (APPCTRL) table is one that is part of general system configuration. Options on this table are set once and do not vary by year, fund, department, transaction, or other factors. The table is very generic in its design so that it can host many different types of options with the **Parameter Name** and **Parameter Value** fields. Of the controls on this table, those listed below directly relate to the Grant Lifecycle Management subsystem. Note: Any changes to records on this table should be followed by a bounce of all servers used for CGI Advantage Financial.

- Grant Lifecycle Management Controls

Parameter	Description
Amendment Number Prefix AMND_NUM_PRFX	Determines the prefix that is used when auto generating the Amendment Number.
Days to allow to Update in ARRA Data DAYS_TO_VERIFY_ARRA_DATA	This parameter controls the period in which quarterly ARRA reporting records may be modified. The initial value for this field as established by Federal Rules is 21. Per Federal Rules, quarterly entry may only be modified for 21 days after the end of the quarter ending date. After 21 days, no further changes to the records are allowed and updates should be made in the next quarter.

Default Grant Cancellation Message DFLT_GRNT_CAN_MSGID	The default cancellation message for Grant transactions.
Default Grant Message ID DFLT_GRNT_MSGID	Indicates the **Message ID** that the Notify Grant Opportunity process uses, if the **Message ID** field is blank on the Grant Notification Status Folder (GTNTSF) table.
Default Grant Message Subject DFLT_GRNT_MSG_SUBJECT	Indicates the value for the Subject field, if left blank on the Grant Message (GRNTMSG) table.
Default Grant URL DFLT_GRNT_URL	The default Grant URL.
Default Opportunity Transaction Code DFLT_OPPORTUNITY_DOC_CODE	The default parameter value for this field is GTOP. When the value for the parameter is blank an error is received on the GTAOD and GTAOS pages when attempting to create Opportunity transactions. When a Transaction Code is specified in this Parameter, the Grant Opportunity transactions created directly from the Available Opportunity Detail (GTAOD) or Available Opportunity Summary (GTAOS) pages will be created using this Transaction Code. Note: The specified Transaction Code must also be set up on the Transaction Control (DCTRL) and Auto Numbering (ADNT) tables. Refer to the “Creating Opportunity Transactions from GTAOD and GTAOS” topic for more information.
Delete Message for a Calendar Alert GRNT_MSG_DEL_ALRT_CAL	This message is used when a User or Date record is deleted. This message is specifically for Grant Users that have an **Alert Type** of *Calendar*. Additional information on this parameter is outlined in the Generate Alerts batch process Run Sheet.
Delete Message for Detailed Email Alert	This message is used when a User or Date record is deleted. This message is specifically for Grant Users that have an **Alert Type** of

GRNT_MSG_DEL_ALRT_DETAIL	*Detailed Email*. Additional information on this parameter is outlined in the Generate Alerts batch process Run Sheet.
Delete Message for Summary Alert GRNT_MSG_DEL_ALRT_SUMM	This message is used when a User or Date record is deleted. This message is specifically for Grant Users that have an **Alert Type** of *Summary Email*. Additional information on this parameter is outlined in the Generate Alerts batch process Run Sheet.
Transaction Code for CAS transaction CAS_DOC_CD	The Transaction Code for the CAS transaction. This can be updated to a value other than CAS if a client site decides to clone the CAS transaction and give it a different Transaction Code.
Due Date Message GRNT_MSG_DUE_ALRT	Indicates the **Message ID** that the Generate Alerts Process uses for generating Calendars/E-mails when no **Message ID** has been defined for the Due Date Message on the Date record.
Grant Awarded Amount GRNT_AWD_AMT	A warning message is issued on the Grant Award if the **Grant Management Statement** field is not populated and the **Awarded Amount** is greater than this parameter value. Note: You must enter a field type of "Number" instead of "String". For example: Number = 20000 String = 20,000
Insert message for all Alert Type GRNT_MSG_INS_ALRT	This message is used as an Insert Message for newly added users for a Date Code whose alerts are already sent. Additional information on this parameter is outlined in the Generate Alerts batch process Run Sheet.
Modify Message for a Calendar Alert GRNT_MSG_MOD_ALRT_CAL	This message is used when the Due Date on a Date Record is modified. This message is specifically for Grant Users that have an Alert Type of *Calendar*. Additional information on this parameter is outlined in the Generate Alerts batch process Run Sheet.

Modify Message for Detailed Email Alert GRNT_MSG_MOD_ALRT_DETAIL	This message is used when the Due Date on a Date Record is modified. This message is specifically for Grant Users that have an Alert Type of *Detailed Email*. Additional information on this parameter is outlined in the Generate Alerts batch process Run Sheet.
Modify Message for Summary Alert GRNT_MSG_MOD_ALRT_SUMM	This message is used when the Due Date on a Date Record is modified. This message is specifically for Grant Users that have an Alert Type of *Summary Email*. Additional information on this parameter is outlined in the Generate Alerts batch process Run Sheet.
Summary Alert Message GRNT_MSG_SUMM_ALRT	The **Message ID** that the Generate Alerts Process uses for generating email when the **Alert Type** is *Email-Summary*. Additional information on this parameter is outlined in the Generate Alerts batch process Run Sheet.
Grant Opportunity Funding Agency Control GTOP_FUND_AGY_CTL	The default parameter value for this field is *C*. Other acceptable values are *O* or *Blank / Null*. When a value of *C* is entered, the Funding Agency field on Opportunity transactions / Status folders is optional when the **Grant Opportunity Source Detail** field does not equal Other. When a value of *C* is entered, the Funding Agency field on Opportunity transactions / Status folders is required when the **Grant Opportunity Source Detail** field equals *Other*. When a value of *O* is entered, the Funding Agency field on Opportunity transactions / Status folders is optional. When no value has been entered, the Funding Agency field on Opportunity transactions / Status folders is required.
Opportunity Transaction Prefix OPPORTUNITY_DOC_PREFIX	This parameter allows sites to define specific prefixes for the Grant Opportunity transactions automatically generated from the Available Opportunity Detail (GTAOD) and/or Available Opportunity Summary (GTAOS) pages.

	The default parameter value for this field is '****'.
Opportunity Transaction Submit OPPORTUNITY_DOC_SUBMIT	The default parameter value for this field is *False*. When the value for the parameter is set as *False* the Grant Opportunity transactions are created directly from the Available Opportunity Detail (GTAOD) and Available Opportunity Summary (GTAOS) pages; however, the transactions are not validated or submitted to Final. This setting allows users to make modifications to the Opportunity transactions and then submit the transactions manually. When the value for the parameter is set as *True* this will facilitate to generate, validate and submit Grant Opportunity transactions directly from the Available Opportunity Detail (GTAOD) and Available Opportunity Summary (GTAOS) pages.

System Options

Records on the System Options (SOPT) table are unique by fiscal year. A year-end process exists to populate the table with values for a coming year so you do not have to enter them manually unless you choose.

For a complete list of the options and controls on the SOPT table refer to the "System Options" topic in the *CGI Advantage - Financial Administration User Guide.*

The following setup is specific to the Grant Lifecycle Management subsystem:

- General Controls

Option/Control	**Description**
Grant Response Days	Allows you to specify the number of days after which a response is expected for a notified opportunity. The default value is set to 30 days.

Grants Setup Tables

The following setup tables are specific to the Grant Lifecycle Management subsystem:

- Grant User
- User Group Template
- Grant Message
- Grant Date Definition
- Grant Date Definition Template
- Grant Date Definition Template Detail
- Funding Source
- Grant Legislative Body
- Service Planning Area
- Budget Structure to Budget Transaction
- ARRA Activity
- ARRA Funding Agency
- ARRA Information

Grant User

The Grant User (GRNTUSER) table captures any individual (and their contact information) that will be receiving notifications/alerts from the Grant Lifecycle Management subsystem. A record should be established, but not required, on this page in order for the grant applicant/system to notify/alert a "grant tracking user". This information is associated with alert user groups via the Grant User Group Template page for both notifications and alerts.

You cannot delete a Grant User on this table, if the Grant User record is used in the Status Folder or Information Needs.

Grant User Group Template

The Grant User Group Template (GRNTTMPL) table allows you to group multiple grant users into a User Group Template. The User Group Template can then be associated with a particular Status "date" record on the Grant Date Definition Template Detail table. The purpose of this table is to simplify the setup of associating "grant users" with Status Date records, which is similar to e-mail groups in Outlook.

Grant Message

The Grant Message (GRNTMSG) table allows you to capture all information for the standard messages that should be sent to potential grant applicants. The **Grant Message ID**, **Message Description**, and **Subject** are required fields. If the **Subject** field is left blank, then the value entered for the **DFLT_GRNT_MSG_SUBJECT** parameter on the Application Parameter (APPCTRL) table is inferred.

You can enter any value within the Status Dates that should be integrated with a particular message. The Generate Alerts batch process will replace the following codes (Grant Messages replaceable parameters) with the actual values within a particular date record. The codes are as follows:

- %DATE_DESCRIPTION%
- %DUE_DATE%
- %APPROVER_NAME%
- %NEXT_ALERT_DATE%
- %GRANT_ID%
- %GRANT_ID_NAME%
- %GRANT_OPP_ID%
- %PROGRAM_NAME%
- %DEPT%

An example of a message in the Grant Message table is as follows:

The %GRANT_ID_NAME% has a %DATE_DESCRIPTION% due on %DUE_DATE%.

On the e-mail, the message would look as follows:

The ***Homeland of Security Grant*** has a ***Pre-Application Due Date*** due on ***10/01/07***.

The Generate Alerts process will determine the appropriate message to send to grant users based upon the **Message ID** associated with the Status Date record. In turn, the system will retrieve the message information (based upon the **Message ID**) and include the information on the alert.

Please note that the Opportunity Notification process will not replace the codes with the actual values if the actual values are not present in the Grant Opportunity. For example, there is no Grant ID at the Grant Opportunity stage. Therefore, a Grant Message that includes the %GRANT_ID% code should not be used.

For additional information on the Generate Alerts job, refer to the "Batch Jobs" topic in this user guide.

Grant Date Definition

The Grant Date Definition (GRNTDEF) table records all standard dates and associated date definition details in the Grant Lifecycle Management subsystem. Grant Users can pick any of these date records and add them to a particular “Status” in the “Status” Dates tab of a page/transaction (for example, Application Dates) or they can associate a date record with a template on the Grant Date Definition Template Detail (GRNTDET) table.

Grant Date Definition Template

The Grant Date Definition Template (GRNTDTT) table enables the Grant Manager to establish a template for a particular Department and Grant Status. In addition, Grant Managers can identify the **Template ID** that should be defaulted/ inferred onto the appropriate “Status” by Department and Grant Status. Only one template can be set as the default (**Default** field is *Yes*) for a combination of Department and Grant Status. The purpose of this table is to simplify the setup of loading and recording Status Date records onto Status Folders.

A unique template can be set up for each department. You can also enter ALL in the **Department** field, which indicates that the template can be used by all departments.

Click on the **Grant Date Definition Template Detail** link to transition to the Grant Date Definition Template Detail table to associate multiple date definitions with the templates you have established.

Grant Date Definition Template Detail

The Grant Date Definition Template Detail (GRNTDET) table allows a Grant Manager to associate the **Grant Date Codes** set up on the Grant Date Definition table with a **Template ID** (for a particular Department and Grant Status) set up on the Grant Date Definition Template table. One **Template ID** can be associated with one or more **Grant Date Codes**. One **Grant Date Code** can be associated with one or more Template IDs. However, the combination of **Template ID** and **Grant Date Code** must be unique.

The Grant Date Definition Template Detail table relates grant dates to a specific template so that multiple dates can default/infer onto a "Status" upon creation. Grant Managers can pick from this table to the Grant Date Definition to infer the date information (for example, Allow Approver, Allow Comments, and so forth). Grant Managers can then update the date information directly on this table to be more specific for that particular template record (that is, specific to their department).

Based on the **Template ID** selected the **Department Code**, **Department Name** and **Grant Status** is inferred. Based on the **Grant Date Code** selected, the **Date Description** is inferred.

The Grant Manager must specify a **Sorting Priority** for each record on the table. The Sorting Priority allows you to specify the order that the "Status" date records will be sorted for the particular **Template ID** and **Status** when loaded to a "Status" page.

Grant Funding Source

The Grant Funding Source (GRNTFS) table stores the types of Propositional Funds (for example, Prop A and Prop C) by initiating year. These funding sources are ultimately associated with a grant opportunity.

Grant Legislative Body

The Grant Legislative Body (GRNTLB) reference table is used to store all of the feasible governmental branches/jurisdictions which can be associated with an application. The GRNTLB stores the legislative body records which can be associated with an application and a record must exist on this table in order to add a legislative body to an application.

Grant Service Planning Area

The Grant Service Planning Area (GRNTSPA) table allows you to set up all Service Planning Areas. The Service Planning Areas are associated with funding allocations. An SPA record cannot be deleted if it is used in a Status record or information needs.

Budget Structure to Budget Transaction

The Budget Structure to Budget Transaction (BSBD) table allows you to specify what budget transaction codes correspond to a particular budget structure ID. Currently this table is used by the Cost Accounting Setup (CAS) transaction and Cost Accounting Modification (CAM) transaction to determine which budget transaction code to use when generating a Cost Accounting Budget transaction. Other processes (that is, interfaces/conversions) can use this table to determine a cross-walk between the budget structures and transaction codes.

This page is delivered with the baseline cost accounting budget structures that can be updated by the Cost Accounting transactions. Consideration of this list should be given for which of these structures is being used and if there are any cloned transaction codes for specific uses. If not being used, the structure should be inactivated on Budget Structure Update so it does not appear in the listing. Any cloned transactions should be added to the page so that they appear in the listing.

If the **CAS & CAM Default Transaction Code** field is *Yes* it indicates that this Transaction Code will be the default value for the Budget DOC Code field in the CAM and CAS transactions.

ARRA Activity

The ARRA Activity (ARRAACTV) table allows users to track ARRA activity codes. You can enter in Activity Codes and Activity Descriptions on the ARRA Activity table or upload a complete list of Activity Codes and Descriptions. Note: The ARRA Activity Code established on this table is completely unrelated to the COA Activity element. The ARRA Activity Codes set up on this table can be used on the Ongoing Award Information table.

ARRA Funding Agency

The ARRA Funding Agency (ARRAFA) table stores the valid **Funding Agency** and **Funding Agency Name** combinations. The **Funding Agency** field provides the numeric code of the Federal Agency that is responsible for funding/distributing the ARRA funds to Recipients.

This table comes pre-loaded with valid Funding Agency and Funding Agency Name combinations as issued by the Office of Management and Budget (OMB). Valid users can add records to this table or remove records from this table. The **Funding Agency** and **Awarding Agency** fields on the Ongoing Award Information table, which are accessible via the ARRA Information (ARRA) page, provide a pick list to this table.

ARRA Information

At the time of award, the award manager will initiate ARRA Reporting for an award by navigating to the ARRA Information (ARRA) table. This table provides access to the following tabs (tables), which allow you to capture required and optional information for ARRA Reporting:

- Ongoing Award Information
- Quarterly Award Information
- Recipient Vendor Quarterly Information
- Sub-Recipient Quarterly Award Information
- Sub-Recipient Vendor Quarterly Information

Advantage security can be set up to secure the records on each table listed above based on the Department and/or Unit specified in the Department and Unit fields under the Advantage Security section on the Ongoing Award Information table.

Ongoing Award Information

The Ongoing Award Information table records the details of the award (grant) and the grant recipient. This table is accessed by selecting the Ongoing Award Information tab on the ARRA Information table. Advantage security can be set up to secure the records on each table accessible from ARRA based on the Department and/or Unit specified in the **Department** and **Unit** fields under the Advantage Security tab on the Ongoing Award Information table.

Records on this table can be modified at any time. Records can only be deleted on this table if:

- There are no children records (that is, no record exists on the Quarterly Award Information table or the Sub-Recipient Quarterly Award Information table for the Funding Agency, Award Number and Awarding Agency combination), AND
- The **Last Reporting Period End Date** and **Last Reporting Extract Date** fields are both blank, which indicates that no reports have been submitted.

The following fields are required on this table:

- Funding Agency
- Award Number
- Awarding Agency
- Recipient DUNS Number

Note: At least one ARRA Activity Code (and no more than 10) is required to submit a quarterly ARRA Reporting extract file to recovery.gov. This edit is enforced by the ARRA Extract batch process.

You can transition to the Grant Award Status Folder from this table. If the **Grant ID** field is populated before you click the **Grant Award Status Folder** link, then you are taken to a pick page showing Grant Award information, filtered by Grant ID.

Select the **Attachment** link to associate an attachment with the selected record.

Quarterly Award Information

The Quarterly Award Information table stores quarterly data for ARRA reporting. This table is accessed by selecting the Quarterly Award Information tab on the ARRA Information table. Advantage security can be set up to secure the records on each table accessible from ARRA based on the Department and/or Unit specified in the **Department** and **Unit** fields under the Advantage Security tab on the Ongoing Award Information table.

Data entry on the Quarterly Award Information table can be performed in various ways:

- Direct entry on the table, all at once, or over time.
- Upload to the table via an SMU Import.

- Entry of an ARRA Information (ARRAD) transaction.

Records on the Quarterly Award Information table are expected to be entered each quarter. Before entry can occur on this table, the Ongoing Award Information table **must** be set up to include a record for the Funding Agency, Award Number, and Awarding Agency. When inserting a new record on the Quarterly Award Information table, the **Funding Agency**, **Award Number**, and **Awarding Agency** are automatically populated, based on the record that was selected on the Ongoing Award Information table before navigating to this table. The **Reporting Calendar Year** and **Reporting Quarter End Date** must also be populated before saving a record on this table.

Set the **Final Report** field to *Yes* to create a final report for an award. Only one record per award is supposed to be "Final", but there are scenarios where entries could be made after the Final entry. A warning message is issued for new Quarterly Award Information table entries (from any quarter) if a final report was already sent (that is, the **Final Report Submitted** field on the Ongoing Award Information table is *Yes*).

The **Days Allowed to verify quarterly reports** (DAYS_TO_VERIFY_ARRA_DATA) parameter on the Application Parameters (APPCTRL) table controls the period in which quarterly ARRA reporting records may be modified. The initial value for this field as established by Federal Rules is 21. Per Federal Rules, quarterly entry may only be modified for 21 days after the end of the quarter ending date. After 21 days, no further changes to the records are allowed and updates should be made in the next quarter.

Records can be deleted at any time until the record is selected for an extract file. Once the record has been extracted (that is, the **Last Reporting Extract Date** is populated), it cannot be deleted.

Select the **Attachment** link to associate an attachment with the selected record.

Recipient Vendor Quarterly Information

The Recipient Vendor Quarterly Information table captures money that is paid by the primary recipient on an award to vendors. Vendors that have received payments above $25,000 must be entered on this table. All other payments can be recorded in a cumulative expenditures field. This table is accessed by selecting the Recipient Vendor Quarterly Information tab on the ARRA Information table. Advantage security can be set up to secure the records on each table accessible from ARRA based on the Department and/or Unit specified in the **Department** and **Unit** fields under the Advantage Security tab on the Ongoing Award Information table.

When inserting a new record on the Recipient Vendor Quarterly Information table, the **Funding Agency**, **Award Number**, **Awarding Agency**, **Reporting Calendar Year** and **Reporting Quarter End Date** fields are automatically populated, based on the record that was selected on the Quarterly Award Information table before navigating to this table. You must also enter either the **Vendor DUNS Number** or a both the **Vendor Name** and **Vendor HQ Zip Code** to save a record on this table. The Vendor DUNS Number or Vendor Name/Vendor HQ Zip Code combination must be unique for the selected Funding Agency, Award Number, Awarding Agency, Reporting Calendar Year and Reporting Quarter End Date.

Select the **Attachment** link to associate an attachment with the selected record.

Sub-Recipient Quarterly Award Information

The Sub-Recipient Quarterly Award Information table captures quarterly data for ARRA reporting for any first-tier sub-contract or sub-award, funded in whole or in part under the Recovery Act (that is over $25,000 and not subject to aggregate reporting). This table is accessed by selecting the Sub-Recipient Quarterly Award Information tab on the ARRA Information table. Advantage security can be set up to secure the records on each table accessible from ARRA based on the Department and/or Unit specified in the **Department** and **Unit** fields under the Advantage Security tab on the Ongoing Award Information table.

Data entry on the Sub-Recipient Quarterly Award Information table can be performed in various ways:

- Direct entry on the table, all at once, or over time.
- Upload to the table via an SMU Import.
- Entry of an ARRA Information (ARRAD) transaction.

Records on the Sub-Recipient Quarterly Award Information table are expected to be entered each quarter. Before entry can occur on this table, the Ongoing Award Information table must be set up to include a record for the Funding Agency, Award Number and Awarding Agency. When inserting a new record on the Sub-Recipient Quarterly Award Information table, the Funding Agency, Award Number, and Awarding Agency fields are automatically populated, based on the record that was selected on the Ongoing Award Information table before navigating to this table. The Sub-Recipient DUNS Number, Sub-Award Number, Reporting Calendar Year, and Reporting Quarter End Date must also be populated before saving a record on this table.

The **Days Allowed to verify quarterly reports** (DAYS_TO_VERIFY_ARRA_DATA) parameter on the Application Parameters (APPCTRL) table controls the period in which quarterly ARRA reporting records may be modified. The initial value for this field as established by Federal Rules is 21. Per Federal Rules, quarterly entry may only be modified for 21 days after the end of the quarter ending date. After 21 days, no further changes to the records are allowed and updates should be made in the next quarter.

Records can only be deleted on this table if:

- There are no children records (that is, no record exists on the Sub-Recipient Vendor Quarterly Award Information table for the Funding Agency, Award Number, Awarding Agency, Sub-Award Number, Sub-Recipient DUNS Number, Reporting Calendar Year and Reporting Quarter End Date combination), AND
- The record has not been selected for an extract file. Once the record has been extracted (that is, the Last Reporting Extract Date is populated), it cannot be deleted.

Select the **Attachment** link to associate an attachment with the selected record.

Sub-Recipient Vendor Quarterly Information

The Sub-Recipient Vendor Quarterly Information table captures money that is paid by the sub-recipient on an award to vendors. Vendors that have received payments above $25,000 must be entered on this table. All other payments can be recorded in a cumulative expenditures field. This table is accessed by selecting the Sub-Recipient Vendor Quarterly Information tab on the ARRA Information table. Advantage security can be set up to secure the records on each table accessible from ARRA based on the Department and/or Unit specified in the **Department** and **Unit** fields under the Advantage Security tab on the Ongoing Award Information table.

When inserting a new record on the Sub-Recipient Vendor Quarterly Information table, the **Funding Agency**, **Award Number**, **Awarding Agency**, **Sub-Award Number**, **Sub-Recipient DUNS Number**, **Reporting Calendar Year** and **Reporting Quarter End Date** fields are automatically populated, based on the record that was selected on the Sub-Recipient Quarterly Award Information table before navigating to this table. You must also enter either the **Vendor DUNS Number** or both the **Vendor Name** and **Vendor HQ Zip Code** to save a record on this table. The Vendor DUNS Number or Vendor Name/Vendor HQ Zip Code combination must be unique for the selected Funding Agency, Award Number, Awarding

Agency, Sub-Recipient DUNS Number, Sub-Award Number, Reporting Calendar Year and Reporting Quarter End Date.

Select the **Attachment** link to associate an attachment with the selected record.

Advanced - Batch Processing

For detailed information on the jobs (such as when to run, input, output, and process parameters) refer to the associated run sheet in the *CGI Advantage Grant Lifecycle Management Run Sheets guide.*

- Batch Jobs
- Report Jobs

Batch Jobs

The jobs are listed alphabetically in the below table and the last column indicates the location in the Batch Catalog. For detailed information on the jobs (such as when to run, input, output, and process parameters) refer to the associated run sheet in the *CGI Advantage Grant Lifecycle Management Run Sheets* guide.

Job Name	Description	Batch Catalog Section
Generate Alerts	The Generate Alerts process sends reminders via email or calendar (before, on or after the due date) for tasks that have not been completed.	Grants
Notify Grant Opportunity	The Notify Grant Opportunity process creates a PDF transaction for a specific Grant Opportunity and emails the PDF transaction to the Grant Users who are selected to be notified for the Grant Opportunity.	Grants
Update Grant Opportunity	The Update Grant Opportunity process imports the www.grants.gov grant opportunity synopsis information directly into Advantage. Once imported, the www.grants.gov grant opportunity synopses are searchable on the Available Opportunity Detail (GTAOD) and Available Opportunity Summary (GTAOS) pages.	Grants

Report Jobs

The report job is listed in the below table and the last column indicates the location in the Batch Catalog. For detailed information on the job (such as when to run, input, output, and process parameters) refer to the associated run sheet in the *CGI Advantage Grant Lifecycle Management Run Sheets* guide.

Job Name	Description	Batch Catalog Section
ARRA Quarterly Extract	The ARRA Quarterly Extract process generates ARRA files that can be uploaded to federalreporting.gov as part of the federal stimulus reporting requirements. The process selects records from the ARRA tables and produces one XML file for each Funding Agency and Award ID combination.	Grants

Frequently Asked Questions

This topic contains a list of frequently asked questions and answers for the Grant Lifecycle Management subsystem.

- I'm ready to enter a Grant Application, but the Grant Opportunity does not exist in the Grant Lifecycle Management subsystem. Do I have to create the Grant Opportunity transaction first?

    No. You can skip the Grant Opportunity transaction, and enter the Grant Opportunity information on the Grant Application (GTAP) transaction.

