CGI Advantage® 4

Grantor User Guide

This document contains information proprietary to CGI Technologies and Solutions Inc. Unauthorized reproduction or disclosure of this information in whole or in part is prohibited.

CGI Advantage is a registered trademark of CGI Technologies and Solutions Inc.

Due to the nature of this material, numerous hardware and software products are mentioned by name. In most, if not all, cases, the companies that manufacture the products claim these product names as trademarks. It is not our intention to claim these names or trademarks as our own.

Copyright © 2001, 2024, CGI Technologies and Solutions Inc. All Rights Reserved.

Table of Contents

© CGI Technologies and Solutions Inc.

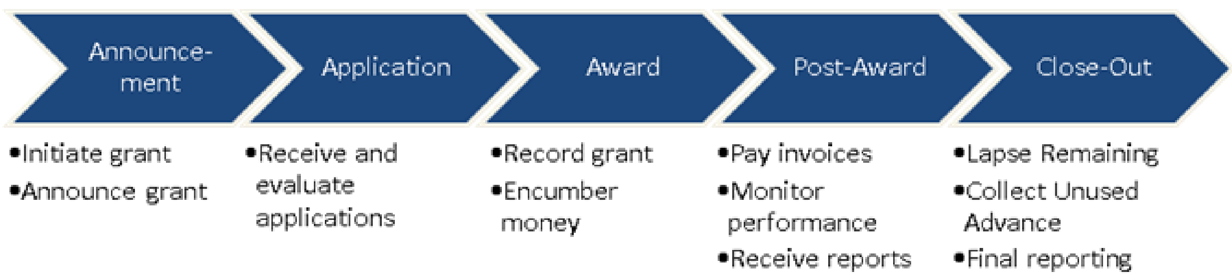
© CGI Technologies and Solutions Inc.

Grantor Overview

Grantor is a functional area within Advantage Financial that is used to track grants where you are the grantor or you are a pass-through grantor. Grantees and Sub Grantees can be a variety of different entities: a non-profit agency, another municipality, another department, an individual, a business, and so forth.

Most competitive grants follow a life cycle as shown below: Announcement, Application, Award, Post-Award, and Close-Out. Grants that are not competitive typically begin at the third step, that is, with an Award.

- For competitive grants, notification of the grant opportunity is distributed through an Announcement, and potential grantees must submit applications for review.
- In the Award stage, the grantor identifies successful applicants or other grant recipients and awards funding.
- The Post-Award stage includes payment processing, financial monitoring, and grantee reporting including recording grantee matches.
- The Close-Out phase includes preparation of final reports, financial reconciliation, and the return of any unused funds.



Unlike many other functional areas that have setup pages specific to that area, the setup for Grantor functionality is done within the Procurement and General Accounting areas of the application. Please refer to the "Grantor Reference Data" topic for more information on these pages.

© CGI Technologies and Solutions Inc.

Common Terminology

This topic contains an alphabetical list of terms that are common in the Grantor area, 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 |

- Grantee

  A Grantee is a recipient of a grant originating from you. The Grantee can be a non-profit agency, another municipality, another department, an individual, a business, and so forth.

- Grantor

  The Grantor is the entity that awards a grant.

- Grantee Match

  Some grants may fund only part of the actual work, with the expectation that the grantee provides some funding as well. Match can be provided with grantee funds (cash match) or through the use of equipment, volunteer time, and other efforts (in-kind match).

- Sub Grantee

  A Sub Grantee is a recipient of a grant originating from another entity but passing through you. The original Grantor could be a federal agency, state agency, county, private company, and so forth. The Sub Grantee can be a non-profit agency, another municipality, another department, an individual, a business, and so forth.

Transaction Information

This topic includes detailed information regarding the transactions in the Grantor area.

- Evaluation (EV) Transaction Type
- Invoice (IN) Transaction Type
- Purchase Order (PO) Transaction Type
- Solicitation (SO) Transaction Type
- Solicitation Response (SR) Transaction Type

There are a number of different transactions in Procurement, Accounts Payable, and even Accounts Receivable that can be and are a part of the Grantor process. They are listed below with a brief summary.

Transaction Code Glossary

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

Transaction Name	Transaction Code	Transaction Type
Grant Application Evaluation	GEV	EV
Grant Funding Application	GFA	SR
Grant Funding Opportunity	GFO	SO
Grant Funding Request	GFR	IN
Grant Given	GG	PO

© CGI Technologies and Solutions Inc.

Evaluation (EV) Transaction Type

The Evaluation Transaction Type is one that is in the Procurement area, but there is a Grantor use outside of that area because of the features available on the Evaluation transaction. Grantor has a specialized Grant Application Evaluation (GEV) transaction code in this Transaction Type.

The Grant Application Evaluation (GEV) transaction allows you to view applications from grantees for a specific grant opportunity. Much of the information on the Grant Application Evaluation transaction defaults from the Grant Funding Opportunity (GFO) transaction. The remaining information comes from the grant applications and from Evaluator transactions.

The Grant Application Evaluation (GEV) transaction consists of a series of tabs that display the information collected in various views and totals the scores collected from the Evaluator transactions for the grant opportunity. Since this transaction is identical in display and function to the Evaluation (EV) transaction, please refer the *Procurement User Guide* for more detailed information about each tab of this transaction.

› Field Information

The Application Status for each application transaction being evaluated on the Grant Application Evaluation (GEV) transaction must be set to either *Approved* or *No Award* in order to submit the Grant Application Evaluation (GEV) transaction. An error is issued if there are outstanding applications that are not in the *Approved* or *No Award* status.

When a Grant Application Evaluation (GEV) transaction is submitted, the system determines if an award transaction exists for the grant application. If an award transaction exists, the Application Status field on the Grant Application Evaluation (GEV) transaction is set to *Approved*. If the application status is manually set to Substantially Approved, a notification will be sent to the Grantee advising them of the status. If an award transaction does not exist and the Application Status has been manually set to *Approved*, a warning message is issued to remind the user to create the award.

When the Grantor flag is checked on the PRDOC table, the Evaluation Transaction Type transactions include the following additional fields to enable the ability to generate the award at either the overall budget category level or project/budget category level and also enable the ability to generate awards and omit budget categories that are not budgeted.

- If the Summarize by Commodity field on the Award By Total section of the Evaluation transaction is *Yes*, then the same commodity codes will be combined/summarized and will only create a single Commodity Line on the Award transaction (for example, the GG transaction).

  Logic of Summarize by Commodity field:

  - If the Summarize by Commodity field is set to Yes on the Award By Total lines, then the same Budget Category line amounts of individual GFA transactions will be combined/summed up and will only create a single Budget Category/Commodity Line on the Award transaction with the summarized Line Amounts.
  - For instance, the above logic will only summarize the Award by Total lines where the Summarize by Commodity field is *Yes*. If the Summarize Commodity by field is *No*, then the system will create individual Budget Category/Commodity Lines on the Award transaction with the respective Line Amounts.

- When the Award transaction's Grantor flag is checked on the PRDOC table and if the Summarize by Commodity field is Yes on the Evaluation transaction, the system will omit the existing logic of referencing the Solicitation Commodity Lines on the Award transaction. This is necessary for the Award transaction creation for Commodity Lines, the Actual reference type on the GG transaction will initiate existing logic, which will give an error for reference amount not matching.
- If the Summarize by Commodity field is Yes on Evaluation transaction type transactions, and the Award flag is not checked on the Award by Total section of the Evaluation transaction, then the system will not summarize the same Commodity lines and Award transactions (for example, the GG transaction) will not be created for those lines.
- When the Award flag is checked/true on the Award by Total section of the Evaluation transaction type transactions, then the following will occur:
    - When the Summarize by Commodity field is *Yes* on the Award by Total section of the Evaluation transaction, then the system will Award the same Commodity Codes of individual Solicitation Response/Grant Funding Application transactions into a single Commodity Line on the Award transaction by summing up their Line Amounts.
    - If the Summarize by Commodity field is *Yes* on Evaluation transaction type transactions, during the Award transaction creation, the system will not include the Commodity lines where the response type is *Not Applied*.

- If the Exclude $0 Commodity Lines field on the Award By Total section of the Evaluation Transaction type transactions is Yes, then on creation of an Award transaction, the Commodities/Budget Categories with $0.00 and less than $0.00 will be omitted and the Award transaction will not include these Commodity Lines.

The system will issue an error if the Summarize by Commodity field and Exclude $0 Commodity Lines field are both set to *Yes*.

› Tab-Level Actions/Links

The **Finalize Application Status** action in the Header tab of the Grant Application Evaluation (GEV) transaction, when selected, sets the Application Status for any linked Grant Application Response transactions that have a status of *In Review*, *Withdrawn*, or *Clarification Requested* to the *No Award* status. This action is only enabled and available to use if the Grantor check box on the Procurement Transaction Control page is selected.

Additionally, the Budget Adjustment field on the Header supports the ability to automatically update the award transaction with the Adjusted Budget allocations made by the grantee during the post award state.

EV Delivered Transaction Codes

The EV Transaction Type has the following Transaction Code:

Name	Transaction Code	Intended Use

Grant Application Evaluation	GEV	The Grant Application Evaluation transaction is used to issue awards.

Invoice (IN) Transaction Type

The Invoice Transaction Type is one that is in the Procurement area, but there is a Grantor use outside of that area because of the features available on the Invoice transaction. Grantor has a specialized Grant Funding Request (GFR) transaction code in this Transaction Type. A grantee's funding request can reference multiple Award transactions.

The Grant Request Funding (GFR) transaction is used by grantees (or grantors on behalf of grantees) to submit reimbursement funding requests. It allows grantees (or grantors on behalf of grantees) to create and submit these requests in both Financial and VSS. Two qualities unique to grants is the need to report on budget category and match requirements stipulated as part of the grant award. The grantor must break down the details of the available funds and have the grantee submit requests on the amount expended per category. For example, the grantee may specify the reimbursement request for categories such as Administration and Travel. The budget category will need to use a single Chart of Accounts (COA) element that will be used across grants awards.

The Grant Funding Request (GFR) transaction contains the following tabs:

- Header
- Grantee
- Grant Component

IN Delivered Transaction Codes

The IN Transaction Type has the following Transaction Code:

Name	Transaction Code	Intended Use
Grant Request Funding	GFR	The Grant Funding Request transaction is used to record grantee's reimbursement funding requests that reference existing Award transactions.

Header

The Header tab on the Grant Funding Request (GFR) transaction is used to record general information regarding the grantee's funding request. The Grantee and Grantee's Request Number should be entered in this tab. An attachment providing supplemental information is required in VSS when the Random or Forced flag is checked (true) on the compliance section of the Grant Year Profile.

 © CGI Technologies and Solutions Inc.

› Required/Conditionally Required Fields

The following fields are required:

- Funding Requested Date
- Received Location
- Grantee
- Grantee Request Number

› Tab-Level Actions/Links

The **View Grant Folder action** displayed on the Header tab allows you to transition to the Procurement Management page to review transactions associated with the Grant Folder. Once you transition from this transaction to the Procurement Management page a **Back** link is visible. Selecting the **Back** link transitions you back to the transaction you transitioned from.

Grantee

The Grantee tab on the Grant Funding Request (GFR) transaction displays general information regarding the Grantee that is requesting the funds. In addition, Disbursement Options may be entered in this tab.

› Required/Conditionally Required Fields

The following field is required if a non-miscellaneous grantee is selected:

- Address Code

The following fields are required if a Grantee Contact ID is not entered:

- Grantee Contact Name
- Grantee Contact Phone

*Special Note: If applicable, Prenote/EFT information is inferred from the Vendor Address section of the Vendor/Customer page if the Prenote/EFT fields on the Address component are populated; otherwise, the values are inferred from the Vendor/Customer section of the Vendor/Customer page.

Grant Component

The Grant Component tab on the Grant Funding Request (GFR) transaction is used to record all information pertaining to a particular grant component line of the Grantee's Funding Request such as the requested amount. All grant code information will initially default from the referenced Award transaction; however, this information may be changed to reflect the actual values requested by the grantee. The Grant Funding Request (GFR) transaction will update the Vendor Invoice Registry table with the grantee's code, grant request number and grant request line number to ensure that duplicate grant funding requests are not recorded for the same grantee.

 © CGI Technologies and Solutions Inc.

This tab records the reference information for the Award transaction. Because this information is at the grant component level, it allows the Grant Funding Request (GFR) to reference more than one Award transaction. All grant component information will initially default from the referenced Award transaction; however, this information may be changed to reflect the actual values requested by the grantee.

› Required/Conditionally Required Fields

The following fields are required:

- Reference Transaction Code
- Reference Transaction Dept
- Reference Transaction ID
- Reference Award Line
- Invoice Indicator
- Component Type
- Grant Request Line No

The following fields are required if the **Component Type** is *Item:*

- Quantity
- Unit Amount

The following field is required if the **Component Type** is *Service*:

- Component Line Amount

The following field is conditionally required, based on site specific setup on the Transaction Control page:

- CL Description

The following fields are conditionally required, based on site specific setup on the Procurement Transaction Control page:

- Grant Code

The **Condition** field and **Reason** field are required if any of the following are true:

- The **Quantity** does not match the **Award Quantity**.
- The **Component Line Amount** does not match the **Award Component Line Amount**.
- The **Invoice Indicator** is *Partial*.

› Tab-Level Actions/Links

The **Matching Status** action transitions you to the Matching Status page and is filtered by the Ref Transaction Code, Ref Transaction Dept, and Ref Transaction ID of the referenced

© CGI Technologies and Solutions Inc.

Award transaction. If no match is found, then the Matching Status page is displayed with a blank record.

- Grant Folder Logic

  If this transaction is associated with another grant transaction and that transaction was the first transaction within the Grant Folder, then the Grant Folder, Grant Type ID, and Grant Type fields are populated with inferred values on copy forward. When the Grant Folder ID field is populated indicating that it is associated with a folder, the **View Grant Folder** action is activated on the transaction Header allowing users to transition to the Procurement Management page to review other Grant Folder information associated with this selected folder. Once the user has transitioned to the Procurement Management page a **Back** link is displayed allowing the user to transition back to the transaction Header where the transition began.

Purchase Order (PO) Transaction Type

The Purchase Order Transaction Type is one that is in the Procurement area, but there is a Grantor use outside of that area because of the features available on the Purchase Order transaction. Grantor has a specialized Grant Given (GG) transaction code in this Transaction Type.

The Grant Given (GG) transaction serves to record the award of a grant to a grantee or sub grantee along with defining each of the grant award lines (for example, grant component lines). The Grant Given transaction can be generated in a number of ways: generated from a Grant Application Evaluation (GEV) transaction, copied from a similar Grant Given (GG) transaction, copied from a grant transaction template, or directly entered.

The Grant Given (GG) transaction contains the following tabs:

- Header

  The Header tab captures useful data about the overall grant. Descriptive fields are among those where grant details can be captured.

  Additionally, for the combination of Grant Form Type and Grant Form Version (Grant Year) used on the GG transaction, if the Over Total Funding Amount Allowed flag is unchecked on the Grant Application Form Type (GAFTYP) table and the grant manager tries to create a Grant Award (GG transaction) for more than the Total Funding Amount based on the GAFTYP table, the system will issue an error message on the GG transaction. This will prevent the obligation of all award amounts from going over the mentioned Amount on the GAFTYP table.

  For the combination of Grant Form Type and Grant Form Version (Grant Year) used on the GG transaction, if the Over Total Funding Amount Allowed flag is checked on the Grant Application Form Type (GAFTYP) table and a grant manager tries to create a Grant Award (GG transaction) for more than the Total Funding Amount as specified on the GAFTYP table, then the system will issue a warning message on the GG transaction and allow the obligation of all award amounts to exceed the Total Funding Amount on the GAFTYP table.

© CGI Technologies and Solutions Inc.

- Award Details

  The Award Details tab captures different classifications (rollups) of a grant.

- Vendor Line

  The Vendor Line tab captures grantee data and requires that the grantee is set up as a vendor record.

- Grant Component Lines

  The Grant Component Lines tab captures the breakdowns of grant money. Using a specific grant code for matching lines from non-matching (or regular) lines is important, because the Match Indicator of a matching grant line must be None. It is important to set the Match Indicator in this manner because matching amounts must be manually entered, and not paid on payment requests generated by the Matching Manager. Manual entry is required because the Matching Manager does not support multiple event types based on what the referenced accounting line had for an event type.

  Additionally, the Budget Line Adjust 1 field supports the ability to automatically update the award transaction with the Adjusted Budget allocations made by the grantee during the post award state.

- Accounting Lines

  The Accounting Lines tab captures the funding of the grant. Use of COA is an important factor here in several situations such as pass-through grants. The funding for grants must come from somewhere, and that funding source is captured in the COA codes on the accounting lines. Here are some of the most common possibilities:

  - Pass-through grants should normally enter the program code that represents the grant being passed on to the grantee. With this approach, disbursements to the grantee are selected for reimbursement automatically.
  - Grants that initiate as part of a special effort (for example, the scenario where the CIO funds special projects by other departments) would be tied to an appropriation, fund, activity, function, or program – as appropriate, based on the source of the money.

  It also captures the Event Type that is selected based on what type of grant component line to which the accounting line belongs:

CL	Event Type	Description
Non-Match	PR05	This Event Type should be used when an encumbrance of funds for later disbursement is required for a grant to an external entity or internal entity not on the same instance of Advantage.

 © CGI Technologies and Solutions Inc.

Non-Match	PR07	This Event Type should be used when no encumbrance of funds is required for a grant to an external entity or internal entity.
Cash Match	CG05	This Event Type should be used when a cash payment will be made by the grantee, internal or external.
In-Kind Match	CG06	This Event Type should be used for tracking non-cash contributions of time, equipment hours, or other by an external or internal grantee.

The accounting treatment of the Cash and In-Kind Match is identical; however, separating them for reporting purposes is recommended. As delivered, the posting codes used for CG05 and CG06 are non-financial ones used for reporting only.

For more information, refer to the *Procurement User Guide* as the two transactions appear the same.

PO Delivered Transaction Codes

The PO Transaction Type has the following Transaction Code:

Name	**Transaction Code**	**Intended Use**
Grant Given	GG	The Grant Given (GG) transaction is used to record the award of a grant to a grantee or sub grantee along with defining each of the grant award lines (for example, grant component lines).

Solicitation (SO) Transaction Type

The Solicitation Transaction Type is one that is in the Procurement area, but there is a Grantor use outside of that area because of the features available on the Solicitation transaction. Grantor has a specialized Grant Funding Opportunity (GFO) transaction in this Transaction Type.

The Grant Funding Opportunity (GFO) transaction serves as an announcement of the grant opportunity, with instructions on how to apply. You can start the grant award process by defining and posting the rules for applications on a solicitation transaction. The Grant Funding Opportunity (GFO) may be created from scratch, a similar Grant Funding Opportunity transaction, or a transaction template. The parts of the Grant Funding Opportunity that make sense for the grant can be used and those that do not can be bypassed. Here is a list of the parts that might be commonly used.

- Attachments are frequently used for grants published to VSS. In many cases, applicants must provide narrative responses, so you might use tools like Word transactions or interactive PDF files for the application.

© CGI Technologies and Solutions Inc.

- Grant Component Lines provide the expense categories of the award that you want applicants to use for their budget requests. Grants often have a "match" requirement, whereby the grantee must demonstrate that they are contributing in some manner. This could be by "In-Kind Match" such as volunteer time or the use of equipment, or through "Cash Match" - direct payments by the grantee. The grantor must track the match as part of the grant for proper reporting. With separate grant code lines, a grantor would know the expected amount of match, the amount matched to date, and the amount of match not yet provided.

- Evaluation templates and criteria lines permit you to share with applicants the ways that their responses will be reviewed. These criteria carry forward to the Evaluation transaction. The Solicitation entry's Publishing tab allows the Advantage site to choose to share the criteria and scoring information to VSS.

- The Schedule of Events is a useful way to list the various deadlines in the application process.

- Vendor Notification rules allow you to send e-mails to registered grantee vendors, either with a Vendor List or e-mails based on the selected grant codes.

- Terms and Conditions can be listed on the Solicitation so applicants can preview the terms that will apply to the award.

- Available controls can prohibit VSS online responses (but publish to VSS anyway), or prohibit more than one response per applicant in VSS.

- For the Grant Form Type and Grant Form Version (Grant Year) combination on the GFO transaction, if the Total Funding Amount is not set up on the Grant Form Type (GAFTYP) table, then a warning message is issued on the GFO transaction.

For more information on the Grant Funding Opportunity (GFO) transaction, refer to the - "Request for Proposal (RFP)" transaction details mentioned in the "SO Transaction Type" topic of the *Procurement User Guide* as the two transactions appear the same.

SO Delivered Transaction Codes

The SO Transaction Type has the following Transaction Code:

Name	**Transaction Code**	**Intended Use**
Grant Funding Opportunity	GFO	The Grant Funding Opportunity (GFO) transaction serves as an announcement of the grant opportunity, with instructions on how to apply.

© CGI Technologies and Solutions Inc.

Solicitation Response (SR) Transaction Type

The Solicitation Response Transaction Type is one that is in the Procurement area, but there is a Grantor use outside of that area because of the features available on the Solicitation Response transaction. Grantor has a specialized Grant Funding Application transaction code in this Transaction Type.

The Grant Funding Application (GFA) transaction captures grant-specific information and enables you to create and submit grant funding applications in both Finance and VSS. The Grant Funding Application transaction functions similarly to the Solicitation Response (SR) transaction.

Note: If the Restrict Multiple Responses per Vendor TIN check box is selected on the referenced Grant Funding Opportunity transaction, then only one response per Vendor Taxpayer Identification Number (TIN) is allowed. This includes responses entered through Vendor Self Service (VSS).

The Grant Funding Application (GFA) transaction contains the following tabs:

- Header
- Grant Group
- Grant Component
- Evaluation Criteria Group
- Evaluation Criteria List
- Modification Authorization
- Weighting Factors
- Service Area

SR Delivered Transaction Codes

The SR Transaction Type has the following Transaction Code:

Name	Transaction Code	Intended Use
Grant Funding Application	GFA	The Grant Funding Application transaction enables you to enter an application to a grant opportunity on behalf of a Grantee.

Header

The Header tab of the Grant Funding Application transaction displays information about the grant opportunity and indicates the grantee responding to the opportunity. This tab also allows you to default the same application type and comments to each line.

© CGI Technologies and Solutions Inc.

- Tab-Level Actions/Links

  The **Clarification Request** action can be used if any additional clarification on the information provided in the Grant Funding Application (GFA) transaction is needed, either from an external grantee in VSS or from an internal source in Financial. This action is only allowed for finalized Grant Funding Application (GFA) transactions whose corresponding Grant Opportunity has closed and will mostly apply to competitive grants. Although it modifies the finalized transaction, it does not update the Transaction Phase or Transaction Version of the transaction. When you select the **Clarification Request** action, you are taken to the Clarification Request page where you can insert a record to request additional information regarding the Grant Funding Application (GFA) transaction.

  The **View Grant Folder** action allows you to transition to the Procurement Management page to review transactions associated with the Grant Folder. Select the Back button on the Procurement Management page to return to the transaction.

  You can optionally indicate the same **Response Type** and **Comments** that you want to apply to all lines on the Grant Component tab. After entering the appropriate values click the **Apply Default Values to Grant Lines** action to default the values to all lines. The values can be overwritten at the Grant Level.

- Grant Folder Logic

  If this is the first transaction within a grant folder, then on validate of a draft transaction, the system assigns a unique **Grant Folder ID** on the grant Header. Or if it is associated with another grantor transaction and that transaction was the first transaction within the Grant Folder, then Grant Folder, Grant Type ID and Grant Type fields are populated with inferred values on copy forward. When the Grant Folder ID field is populated indicating that it is associated with a folder, the **View Grant Folder** action is activated on the transaction Header allowing users to transition to the Procurement Management (PRCUID) page to review other Grant Folder information associated with this selected folder. Once the user has transitioned to the PRCUID page, a **Back** action is displayed allowing the user to transition back to the transaction Header where the transition began.

- Field Information

  When the Grant Funding Application (GFA) transaction is created by the **Copy Forward** feature on the Grant Funding Opportunity transaction, all referencing information from the Grant Funding Opportunity is automatically displayed on the Grant Funding Application (GFA). The Vendor/Customer Code of the grantee responding to the Grant Funding Opportunity must be entered in the **Grantee ID** field. The **Response Date** and **Response Time** must be entered on the Grant Funding Application transaction and must be prior to the Opportunity's **Close Date** and **Close Time**.

Grant Group

This tab displays the categories (Grant Group) set up for the referenced Grant Funding Opportunity. For example, a coordinator may have grouped Job Training, Screening, and Evaluation Consulting for a Workforce Improvement Grant.

Grant Component

The Grant Component tab on the Grant Funding Application (GFA) transaction allows a grantee's response to each grant line to be recorded. This tab records the grantee's **Response Type** (that is, *Applied* or *Not Applied*) to the grant code line.

The Grant Component tab contains the following sections:

- Field Information

  A **Response Type** must be selected to submit the Grant Funding Application (GFA) transaction to *Final*. If *Not Applied* is selected in the **Response Type** field, then the reason must be specified in the **Comments** field.

  The following field is conditionally required, based on site specific setup on the Transaction Control page:

  - Component Description

  The following fields are required if the **Line Type** is *Item*:

  - Requested Quantity
  - Component Unit
  - Component Unit Amount

  The following field is required if the **Line Type** is *Service*:

  - Requested Amount

  The Line Item Preferences fields allow grantees to indicate if they want to be considered for the selected Preference by selecting the **Include** check box. All other fields are protected and are inferred from the Grant Funding Opportunity transaction. The buyer can change the value of the Include check box on the Evaluation transaction.

Evaluation Criteria Group

The Evaluation Criteria Group tab on the Grant Funding Application transaction displays the categories (Evaluation Criteria Groups) for the evaluation criteria on the Evaluation Criteria List tab.

Evaluation Criteria List

The Evaluation Criteria List tab displays all of the Evaluation Criteria specified on the Grant Funding Opportunity transaction. Manual responses to each criterion must be provided in the **Response Type** requested.

- Required/Conditionally Required Fields

  If Evaluation Criteria was specified on the referenced Grant Funding Opportunity transaction, then the grantee must respond to each criterion listed. Depending on the criterion type, different fields will be available for data entry.

- If the **Response Type** is *Date*, then the **Date Response** field is available.
- If the **Response Type** is *Number*, then the **Number Response** field is available.
- If the **Response Type** is *Yes/No*, then the **Yes/No Response** field is available.
- If the **Response Type** is *Text*, then the **Text Response** field is available.

The **Response Required** field indicates whether a response is required for each of the criterion listed. The value for this read-only field is inferred from the Response Required field of the associated evaluation criteria line of the referenced Grant Funding Opportunity transaction. If a response is not provided and Response Required is *Yes*, then the system will prevent the transaction from being submitted to *Final*.

Modification Authorization

The Modification Authorization tab of the Grant Funding Application (GFA) transaction must be completed if the Grant Funding Application (GFA) transaction is being modified (that is, the Grant Funding Application (GFA) transaction had already been submitted to *Final*).

A modification to the Grant Funding Application (GFA) transaction may occur if during review of the applications, the coordinator determines and verifies that the grantee has made a non-substantive error in the application. This tab provides an audit trail to keep track of the user's name that made the change and the grantee's contact person that authorized the change.

› Required/Conditionally Required Fields

If a Final version of a Grant Funding Application (GFA) transaction is being modified, then the following fields are required:

- Reason
- Authorized On
- Authorized By

Weighting Factors

The Weighting Factors tab of the Grant Funding Application (GFA) transaction displays the Business Type records associated with the grantee profile from the Vendor/Customer page. This tab allows grantees to indicate if the specified Weight Factor % and Dollar Cap $ for the Business Type should be considered in the application review process.

› Field Information

© CGI Technologies and Solutions Inc.

The Weight Factor % and Dollar Cap $ are inferred from the Business Type page. The coordinator can select or unselect the **Include** check box on the Grant Funding Application transaction. Select the **Include** check box if the specified Weight Factor % and Dollar Cap $ for the Business Type should be included in the application review process.

Service Area

The Service Area tab of the Grant Funding Application (GFA) transaction provides grantees with the means to identify the active areas covered by the grant opportunity.

© CGI Technologies and Solutions Inc.

Scheduling and Reporting

Following the issuance of grant awards, reporting by the Grantee is an essential business process. In order to ensure compliance with the terms and conditions of the grant award, the grantor determines monitoring activities to ensure the grantee follows the grant requirements and submits the appropriate reports. The grantor is responsible for developing and communicating schedules of monitoring activities to the grantee so that the recipient is aware of the events. The grantee is responsible for managing the day-to-day operations of the activities supported by the award and for submitting timely progress reports.

› Monitoring of the grant events

Monitoring of the grant events is the process by which the financial and programmatic performance is continuously reviewed by the grantor. The grantor seeks to ensure that the grantee is using the funds for the purpose of the grant, charging the appropriate costs within the appropriate times, and meeting the goals and objectives outlined in the award.

Monitoring activities can include the following:

- Site Visits – this activity is conducted by the grantor as needed or as requested by the grantee to substantiate progress and compliance with award requirements.
- Audits – this activity is conducted to verify financial and award compliance matters.
- Correspondence – this activity can include communication by email, postal mail, or telephone.
- Financial and Progress Reports – this activity includes the submission of periodic financial and progress reports from the grantee.

The Grantor module provides the ability for grantors to publish reporting schedules and receive grant reports, and for grantees to manage and submit grant reports using the following pages:

- Grant Events Schedule
- Grant Report

Grant Events Schedule

Once a grantee's grant funding application has been approved, the grant reporting schedules need to be communicated to grantees so that they can manage and submit grant reports in a timely manner.

The Grant Events Schedule page allows the grant coordinator to configure a schedule of events for an awarded grant. Records on this page must be tied to a finalized Grant Funding Opportunity transaction since the schedule may need to be published to a large number of grantees. You may optionally enter related Grant Funding Application and Grant Given transaction information on this page. An established schedule can be re-used together with another Grant Funding Opportunity transaction. The system uses the Schedule ID, Grant Funding Opportunity transaction information, Grant Funding Application transaction information, and Grant Given transaction information to determine whether the Grant Events Schedule record is unique.

 © CGI Technologies and Solutions Inc.

- Required/Conditionally Required Fields

  When creating a Grant Events Schedule record, you should enter the Grant Events Schedule ID (or you can leave it blank and the system will auto-generate the value), Schedule ID, Schedule Name, Schedule Description, and the Opportunity transaction fields. After this initial save, you can then enter any non-inferred fields before changing the Status to *Ready* to *Publish*.

- Grid- Level actions/Links

  You may associate multiple grant event records to the Grant Events Schedule record by using the grid at the bottom of the page.

  The **Load Event Definition Template** action allows you to load multiple grant event records based on the Schedule Template ID entered. Each time that the **Load Event Definition Template** action is selected, the system deletes the grant event rows linked to the Schedule Template ID and reinserts the rows based on the Grant Date Definition Template page values for the Schedule Template ID. Manually entered grant event rows are not impacted and are not removed by clicking on the **Load Event Definition Template** hyperlink.

  The **Attachments** action allows you to add attachments that are tied to the individual grant event rather than the entire grant schedule. Multiple attachments may be made to an individual grant event record and files attached in Advantage Financial can be viewed from Vendor Self Service.

- Publishing of Grant Events Schedule (GES) Records

  Once a Grant Events Schedule (GES) record has been published, it cannot be removed from VSS. Changing the value of the Status field should be done very carefully. Changing the value of a Grant Events Schedule (GES) record from *Restricted* to *Ready to Publish* results in the entire record being sent to VSS, not just changes to the record since the last time it was updated in Financial. Changing the status of a published record from *Published* to a different value (for example, *In Review* or *Restricted*) does not remove the record from VSS.

  Once a Grant Events Schedule record has been published to VSS, the system does not allow you to modify most of the information on the Grant Events Schedule record. For example, after the Grants Events Schedule record is published to VSS, you are not able to delete the Grant Events Schedule record but you may change the Status field and some of the information in the Grant Events Schedule. You cannot add or delete Grant Event rows once the Grant Event Schedule record has been published. To publish changes to the existing Grant Events, you should set the Status field to *Ready to Publish* and the Export from Advantage batch job will pick up the record again.

Grant Report

After the grant reporting schedules are made available to the grantees, it is critical for the funded organization to be able to easily share the progress of implementing the funded grant.

The Grant Report page is used to store grant reports as well as confirmation acceptance records submitted in VSS. This page displays information submitted from VSS as well as provides the ability to

 © CGI Technologies and Solutions Inc.

manually enter the information in Financial. When you manually enter a record on this page, you must specify the Grant Events Schedule ID, Grant Event Code, and Application transaction information. All other unprotected fields are optional.

The Grant Report page includes the following tabs:

- Status Information – If more than one version of a record exists, you are only allowed to update this tab on the latest version of the record.
- Schedule Information – The fields in this tab are protected if the record was created in VSS (VSS Initiated check box is selected) or if the record has been published to VSS.
- Goals/Outcomes – The fields in this tab are protected if the record was created in VSS (VSS Initiated check box is selected) or if the record has been published to VSS.
- Requested Information – The fields in this tab are protected if the record was created in VSS (VSS Initiated check box is selected) or if the record has been published to VSS.
- Additional Information – The fields in this tab are protected if the record was created in VSS (VSS Initiated check box is selected) or if the record has been published to VSS.
- Status History – This tab serves as the audit log of changes to the status of the record. This tab is updated when changes are made to either the Status and/or Review Comments fields and it displays the history of the selected grant report record.

› Important Concepts of Grant Report

When a Grant Report record that does not require grantee acceptance (as indicated by a value of *No* in the Acceptance Required field) is successfully added to the Grant Report page in Advantage Financial, the Status field of the report is set to *In Review*. In order to publish the Grant Report record in VSS, you need to manually set the Status to *Submitted*. If the Grant Report record is updated to include internal attachments or comments that should not be viewed by the grantee, you need to manually set the Status field to *Restricted*.

Changing the value of the Status field should be done very carefully. Once a Grant Report record has been published, it cannot be removed from VSS. Changing the value of a Grant Report record from *Restricted* to *Submitted* results in the entire record being sent to VSS, not just changes to the record since the last time it was updated in Financial. Changing the status of a published record from *Published* to a different value (for example, *In Review* or *Restricted*) does not remove the record from VSS.

If you need to change any of the information on a report that exists in VSS (for example, add award information to the report), you need to copy the record, paste the copied record to the Grant Report page, and manually increment the Version field on the copied record to indicate that the record is a new version of the original report record. If the record requires grantee acceptance (as indicated by a value of *Yes* in the Acceptance Required field) and is successfully saved and the Accepted by Grantee field is set to *Yes*, then the Status fields is automatically set to *Approved* when the record is initially added to the page.

The Export from Advantage batch job exports all Grant Report records that do not have a Status of *Draft*, *In Review*, *Clarification Provided*, or *Restricted* and publishes the records to VSS. After the initial export of the record, the record is not synched to VSS unless the Status is updated.

› Grid-Level Actions/Links

The **Attachments** action allows you to add attachments to the Grant Report record. Multiple attachments may be made to an individual grant event record and files attached in Advantage Financial can be viewed from VSS, but not modified or removed from VSS. Files attached in VSS are accessed using the Grantee Attachments component and can be viewed from Advantage Financial, but not modified or removed in Advantage Financial.

The **Grants Management** action navigates you to the Procurement Management page and filters the results to display records associated with the Grant Folder on the Grant Report record.

The **Grant Events Schedule** action navigates you to the Grant Events Schedule (GES) table page and filters the results to display the records based on the selected Grant Events Schedule ID.

Inquiries

While each inquiry listed in the "Inquiries" topic in the *Procurement User Guide* can be potentially used for Grants, the following inquiries are specific to grants.

Inquiry Name	Page Code	Description
Grant Amendment History	GAHPH	This page allows users to search for final versions of grant transactions for a grantee.
Grant Application History	GARPH	This page allows users to search for grant funding application transactions for a specific Grantee.
Grant Award History	GADPH	This page allows users to search for specific information related to Grant Given (GG) transactions.
Grant Funding Opportunity History	GFOPH	This page allows users to search for specific information related to Grant Funding Opportunity (GFO) transactions.
Grant Funding Request History	GFRPH	This page allows users to search for specific information related to Grant Funding Request (GFR) transactions.
Grant Payment History	GPHPH	The page allows users to search payment history related to a specific Grantee.
Grant Transaction History	GTH	The page allows users to search for grant related transactions (for example, GFO, GFA, GG, GFR, PRC, PRM, MD, AD, and so forth) at the summary and detailed levels.

Grant Amendment History

The Grant Amendment History (GAHPH) page allows users to view the final versions of grant transactions for a grantee. The page only allows the user to search for a single Grantee Code at a time. The Line Amount Column label on this page represents the commodity line amount on the displayed transaction. The search results display a link to the transaction. Users can transition to the other grant inquiry pages by accessing the three-dot menu on grid results and selecting related pages displays the hyperlinks.

› Row-Level action/links

The following links transition you to the indicated inquiry page:

- Grant Funding Opportunity History
- Grant Application History

 © CGI Technologies and Solutions Inc.

- Grant Award History
- Grant Funding Request History
- Grant Payment History

Grant Application History

The Grant Application History (GARPH) page allows users to view grant funding opportunity transactions for grantees that have applied. The page only allows the user to search for a single Grantee Code at a time. The final version of the transaction including all commodity lines associated with that transaction is displayed. The Line Amount Column label on this page represents the commodity Total Amount field in the Grant Funding Application (GFA) transaction. The search results display a link to the transaction. Users can transition to the other grant inquiry pages via Related Pages links in the row-level menu.

› Row-Level action/links

The following links transition you to the indicated inquiry page:

- Grant Funding Opportunity History
- Grant Award History
- Grant Funding Request History
- Grant Payment History
- Grant Amendment History

Grant Award History

The Grant Award History (GADPH) page allows users to view grant award transactions for grantees. The page only allows the user to search for a single Grantee Code at a time. The final version of the transaction, including all commodity and accounting lines associated with that transaction is displayed. The Calculate Total button on this page calculates the sum of the values displayed in the Line Amount column. The Line Amount column represents the accounting Line Total from the award Grant Given (GG) transaction. The search results display a link to the transaction. Users can transition to the other grant inquiry pages via Related Pages links in the row-level menu.

› Row-Level action/links

The following links transition you to the indicated inquiry page:

- Grant Funding Opportunity History
- Grant Application History
- Grant Funding Request History
- Grant Payment History
- Grant Amendment History

Grant Funding Opportunity History

The Grant Funding Opportunity History (GFOPH) page allows users to view Grant Funding Opportunity (GFO) transactions for grantees that have applied. The page only allows the user to search for a single Grantee Code at a time. The final version of the transaction including all commodity lines associated with that transaction is displayed. The search results display a link to the transaction. Users can transition to the other grant inquiry pages via Related Pages links in the row-level menu.

- Row-Level action/links

  The following links transition you to the indicated inquiry page:

  - Grant Application History
  - Grant Award History
  - Grant Funding Request History
  - Grant Payment History
  - Grant Amendment History

Grant Funding Request History

The Grant Funding Request History (GFRPH) page allows users to view Grant Funding Request (GFR) transactions related to a specific Grantee. The page only allows the user to search for a single Grantee Code at a time. The final version of the transaction including all commodity lines associated with that transaction are displayed. The search results display a link to the transaction. Users can transition to the other grant inquiry pages via Related Pages links in the row-level menu.

- Row-Level action/links

  The following links transition you to the indicated inquiry page:

  - Grant Funding Opportunity History
  - Grant Application History
  - Grant Award History
  - Grant Payment History
  - Grant Amendment History

Grant Payment History

The Grant Payment History (GPHPH) page allows users to search for payment transactions related to a specific Grantee. The page only allows the Grant Administrator to search for a single Grantee Code at a time. The final version of the transaction including all commodity lines associated with that transaction is displayed. The search results display a link to the transaction. Users can transition to the other grant inquiry pages via Related Pages links in the row-level menu.

- Row-Level action/links

The following links transition you to the indicated inquiry page:

- Grant Funding Opportunity History
- Grant Application History
- Grant Award History
- Grant Funding Request History
- Grant Amendment History

Grant Transaction History

The Grant Transaction History (GTH) page allows users to search for grant related transactions for a Grantee. A Calculate Total link is available to calculate the sum of the values displayed in the Line Amount column based on the returned records. The calculated total is only displayed when the user selects the Calculate Total link. The final version of the transaction is displayed. The search results display a link to the transaction. Users can transition to the other grant inquiry pages via Related Pages links in the row-level menu.

› Row-Level action/links

The following links transition you to the indicated inquiry page:

- Grant Funding Opportunity History
- Grant Application History
- Grant Award History
- Grant Funding Request History
- Grant Payment History
- Grant Amendment History

Advanced - Setup

Grantor Setup can be divided into the following logical areas:

- Grantor Reference Data
- Other Reference Data

With the exception of the grantor specific setup below, most of the setup needed for the grantor functionality is the same as the procurement setup. See the "Advanced Setup" topic in the *Procurement User Guide* for more information.

Grantor Reference Data

The following pages are not considered just part of Grantor but are used by the transactions processed as part of a grant award. Those setup pages that are part of Procurement are listed with details on how they can be used for grant awards as listed in this topic. Full details about each page can be found in the *Procurement User Guide*.

- Commodity

  The Commodity page allows you to establish grant codes that will represent the different breakdowns of grant money. Separate codes are suggested for grants for reporting reasons.

- Commodity Object

  The Commodity Object page is optional setup that allows you to define exactly what Objects can be used with a given Grant Code.

- Procurement Transaction Control

  The Procurement Transaction Control page allows you to establish data requirement and other rules for the transaction codes used for grant awards process.

- Evaluation Criteria

  The Evaluation Criteria page is required if the Solicitation and Evaluation processes are to be used for Grant Awards.

- Evaluation Criteria Template

  The Evaluation Criteria Template page allows you to establish sets of evaluation criteria that can be reused for like grants, thus reducing the data entry effort and achieving consistent information.

- Terms & Conditions

  The Terms & Conditions page is used to lay out the terms and conditions a grantee must meet to keep a grant. Terms and Conditions can be conditionally required for the Grant Funding Opportunity and Grant Given transactions based on Procurement Transaction Control setup.

- Terms & Conditions Template

© CGI Technologies and Solutions Inc.

The Evaluation Criteria Template page allows you to establish sets of terms and conditions that can be reused for like grants, thus reducing the data entry effort and achieving consistent information. A Terms and Conditions Template can be conditionally required for the Grant Funding Opportunity and Grant Given transactions based on Procurement Transaction Control setup.

- Buyer

The Buyer page allows you to set up individual grant award staff for reporting and workload management.

- Buyer Team

The Buyer Team page allows you to optionally set up teams responsible for the solicitation, evaluation, award, and post award tasks for grants.

- Buyer Team Members

The Buyer Team page allows you to associate grant award staff to grant teams.

- Application Parameters (APPCTRL)

Although officially listed as an Infrastructure table, the Application Parameter 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 Grantor area. Each is discussed in other topics in this user guide where functionality is detailed that uses the application parameter. **Note:** Any changes to records in this table should be followed by a bounce of all servers used for CGI Advantage Financial.

Vendor / Customer Controls

Parameter	Description
Allow Grants (ALW_GRNTR)	This parameter controls the display of the Grant Opportunities and Grant Applications sections in VSS. If the parameter is set to *Yes*, these areas are displayed. If the parameter is set to *No*, these areas are hidden in VSS.
Grant Budget Category COA (GRANT_BUDG_CAT_COA)	For the specified COA element entered, this parameter prevents the use of duplicate Task Codes across multiple Accounting Lines referencing a single Grant Component Line.
VSS Grant Funding Request Transaction Code (VSS_GFR_DOC_CD)	This parameter specifies the Transaction Code to be used when syncing a VSS Grant Funding Request to Financial. The default value for this parameter is GFR.

VSS Grant Funding Request Transaction Department (VSS_GFR_DOC_DEPT)	This parameter specifies the Transaction Department Code to be used when syncing a VSS Grant Funding Request to Financial.
VSS Grant Funding Request Transaction Unit (VSS_GFR_DOC_UNIT)	This parameter specifies the Transaction Unit Code to be used when syncing a VSS Grant Funding Request to Financial.

› Procurement Type, Stages, Milestones, & Transactions

Refer to the Procurement User Guide for more information.

Other Reference Data

Beyond the pages in the Grantor Reference Data topic, there are a few of other locations that are used:

- The accounting model for Grant Awards is given in the "Procurement Accounting Model" topic of the *CGI Advantage - Financial Administration User Guide*.
- Vendor: Each Grantee and Sub Grantee must be set up as a valid vendor with all of the associated setup to allow disbursements.
- Security: There is a Grantor security role along with a security resource group of Grantor Transactions delivered for use or adjusted as needed.
- Workflow: This data should be set up on site for the needs of each granting department.

Grantee Profile

The Grantee Profile (GPRO) table consolidates information about the grantee and the entities associated with the grantee and the award. The page displays the Grantee's code along with the information about the type of grant that was awarded. It enables alerts to be set up for the grantee and reminders of when to send the alert. It also includes the Contact information for the grantee to be displayed.

There is also a second tab (Associated Entities) that allows information to be added for any associated sub-grantee or organization that is participating in the grant activities. This displays the organization's name, principal contact and other contact persons within that organization's location.

There are links added to the page to transition you to the Vendor/Customer page that will show additional details about the grantee. The Grant Year Profile link will transition you to the page where there are additional details including the awarded year, funding sources, and award dates.

› Required/Conditionally Required Fields

  - Grantee

© CGI Technologies and Solutions Inc.

- Grantor Department
- Grant Type
- Organization (When the Associated Entities tab is populated)

› Grid-Level Actions/Links

- The **Vendor/Customer** action navigates you to the Vendor/Customer page where the Grantee details are stored.
- The **Grant Year Profile** action navigates you to the Grant Year Profile page that stores the consolidated information about the year the award grant was awarded.

Auditor

The Auditor (AUD) table is used to create records to store the contact information for the auditor. The auditor information can be queried by Auditor ID, Company, First Name, or Last Name. The page displays the auditor ID, principal contact person's name, mailing address, phone, and fax numbers, as well as the auditor's email address.

› Required/Conditionally Required Fields

- Auditor ID

Grant Year Profile

The Grant Year Profile (GYPRO) page is used to consolidate information about the year the award grant was awarded. The Grant Year tab contains the General Info, Principal Address, Risk Assessment, Contact Information, Auditor, and Compliance sections. There is also a link to transition to the Vendor/Customer page through the Related Pages action.

The General Information section displays the Grantee Code, Grantor Department, Grant Type, and the Catalog of Federal Domestic Assistance (CFDA) number and other details of the grant award. The Principal Address section has the grantee's address, and the Risk Assessment section has fields to enter the date and assessment score. The Contact Information section allows the user to store the details for up to three contacts. The Auditor section contains a pick list to select the auditor. The Compliance section has flags that are set to determine the additional documentation that will be required.

The Grant Eligibility tab contains a pick list for the eligibility field and provides fields to list the dates that the award is active and a drop-down to set the grant active or inactive.

The Partnership tab allows the user to add the grantee information for any organization that provides assistance with grant activities and the contact address, name, phone number, and email address.

› Required/Conditionally Required Fields

- Grant Year
- Grantee

- Grantor Department
- Grant Type
- Street 1
- State
- Country
- Eligibility (When the Grant Eligibility tab is populated)

› Grid-Level Actions/Links

- The **Vendor/Customer** action navigates you to the vendor customer page where the Grantee details are stored.

Grant Audit Tracking

The Grant Audit Tracking (GAT) table is used to enter, modify, and query grant audit report details on one page. The Grant Audit Tracking table serves as the central repository where a Grant Administrator can record and track the Audit details such as audit type and status, extension requests and approval statues, and important dates. The grant audit information can be queried by Fiscal Year, Audit ID, Grantee Code, Grant Administrator, Due Date, Audit type, and Grant Folder. This provides the grantor with the ability to obtain robust or narrow search results.

The History tab stores the fields that were changed with the old and new values. The user information of the person who modified the record and the modification date are also displayed. The information on this tab is not editable, the information is inferred from the record.

› Required/Conditionally Required Fields

- Fiscal Year
- Audit ID
- Grantee Code
- Date of Request/Notification
- Action No. (When the Audit Actions tab is populated)
- Action Type (When the Audit Actions tab is populated)

Grant Application Form Type

The Grant Application Form Type (GAFTYP) table is used to enter, modify, and query for grant application form types on one page. The Grant Application Form Type table is a reference table that is used to establish and maintain Grant Types.

› Required/Conditionally Required Fields

- Grant Form Type
- Grant Form Name
- Grant Form Version

Grant Application Form Project

The Grant Application Form Project (GAFPRJ) table allows you to track the Project that is associated to a particular Grant Form Type.

› Required/Conditionally Required Fields

- Grant Form Type
- Grant Form Version
- Grant Form Project
- Grant Project Name

Grant Application Form Field

The Grant Application Form Field (GAFFLD) table allows users to define the fields that will be included on the grant application and/or grant report. The Grant Application Form Field table is the basis for configuring instructional and data entry fields. This reference table works in conjunction with the Grant Application Form Field List table. These reference tables are used in the creation of the dynamic grant application.

› Required/Conditionally Required Fields

- Grant Form Type
- Grant Page
- Grant Project
- Part Number
- Field Number
- Data Type

Grant Application Form Field List

The Grant Application Form Field List (GAFLST) table allows users to define statuses that will be used on the Grant Application Form Field page. This reference table works in conjunction with the Grant

© CGI Technologies and Solutions Inc.

Application Form Field table. These reference tables are used in the creation of the dynamic grant application.

› Required/Conditionally Required Fields
  - List ID
  - Stored Value
  - Display Value

Grant Application Form Part

The Grant Application Form Part (GAFPRT) table allows you to track the Part that is associated to a particular Grant Form Type. The Grant Application Form Part allows for the creation of sections within the Header or each Project. The Parts will appear as separate links under the Header and Project. Each Part can be configured for independent approval.

› Required/Conditionally Required Fields
  - Grant Form Type
  - Grant Form Version
  - Grant Page
  - Grant Project
  - Part Number
  - Part Name

Grant Application Report Field

The Grant Application Report field (GAFRPT) table allows you to define the format of the grant report. The grant form type, grant form version, data types, position of the columns, column captions, and report category are defined here to determine how they are displayed on the report.

› Required/Conditionally Required Fields
  - Grant Form Type
  - Grant Form Version
  - Data Type
  - Table Number
  - Column Number
  - Column Caption

- Report Category

Grant Application Table Field

The Grant Application Table field (GAFTBL) table is the basis for configuring grant application tables and is used in conjunction with the Grant Application Form Field table. This allows users to define the format of the grant report and restrict the number of columns displayed in VSS. The grant form type, grant form version, data types, position of the columns, column captions, and report category are defined here to determine how they are displayed on the report.

› Required/Conditionally Required Fields

  - Grant Form Type
  - Grant Form Version
  - Grant Page
  - Grant Project
  - Part Number
  - Table Number
  - Table Caption
  - Column Number
  - Column Caption
  - Data Type

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 Grantor Run Sheets* guide.

- Batch Jobs

Batch Jobs

The batch jobs are listed alphabetically in the following 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 following user guide: *CGI Advantage Grantor Run Sheets.*

Job Name	Description	Batch Catalog Section
Update Random Compliance	This job updates the Random Compliance flag on the Grant Year Profile table.	Grantor

© CGI Technologies and Solutions Inc.