Department of Human Services

Action Tracker Modernization Learner's Workbook

Module 1 Creator and Administrator

Allegheny County Department of Human Services
Education/Training and Organizational Development (ETOD) Area

April 7, 2015

Table of Contents

OBJECTIVES:

By the end of the module, learners will be able to:

If learner is a New User or Creator:

- ☐ Identify information on Homepage
- ☐ Use Process Menu
- ☐ Know how to locate and view details of Grants, Executive Actions, and Contracts
- ☐ Create and track Grants, Executive Actions, and Contracts
- ☐ Search, Copy, Modify, and Archive Grants, Executive Actions, and Contracts

If learner is an Administrator:

- ☐ Assign backup Approvers
- ☐ Add new Providers and Grantors
- ☐ Change status of Providers and Grantors
- ☐ Reassign Grants, Executive Actions, and Contracts from one user to another
- ☐ Create and add distribution groups
- ☐ Add users to distribution groups
- ☐ Manage Approval Transfers

INTRODUCTION

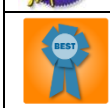
Action Tracker allows users to track grants received, initiate executive actions and contracts and facilitates the tracking of them through to final approval and execution. Action Tracker gives the user the ability to track all actions related to a grant, contract, executive action and run reports

2015 ENHANCEMENTS

- Active Directory integration enabled - use network password
- All current functionality is retained.
- Progress Bar/quick glance for the approval status
- Accessible outside county network
- Contract Yes/No now mandatory and will not default to Yes
- Cut and paste used with mouse
- Enhanced Administrator functionality will allow department to redirect actions to a back-up person with Start date/time and End date/time
- Information boxes on screens for quick tips
- Navigation pane/ease of navigation
- Spell check enhancement
- The character limit for text boxes raised from the 1,500 characters to 4,000
- User Interface updated with a fresh look and feel

Icons:

When you see these icons they indicate:

	**New and Improved** user interface.
	Suggested **Best Business Practice**.

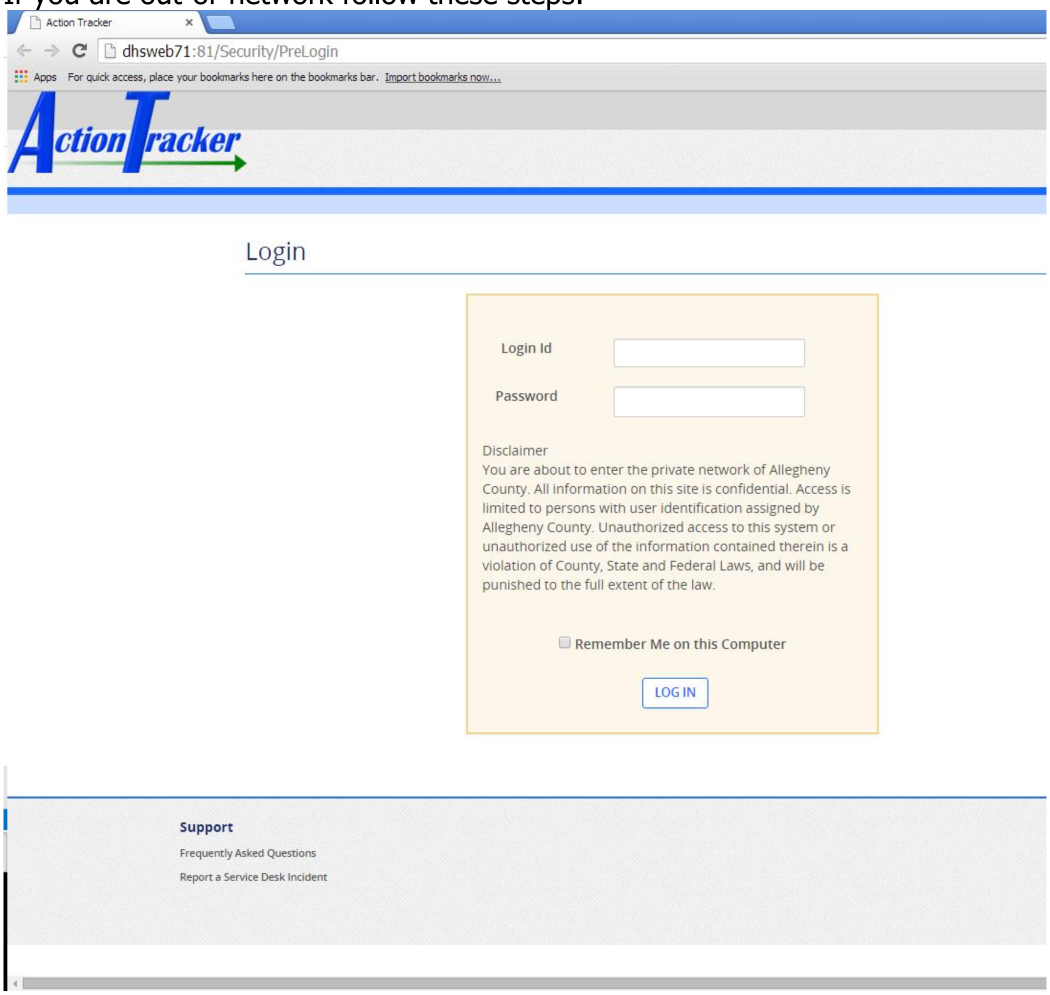
Section 1: Logging Into Action Tracker

Using Network Login Information

Logging into Action Tracker will now only require one Login Id and Password. This is the same information used to log into your network computer.

Using Out-of-Network Login Information

If you are out-of-network follow these steps:



<u>Out-of Network Login Steps:</u>

Access application: https://actiontracker.alleghenycounty.us/Security/PreLogin

1. Type in your **Login Id**

Logging Into Action Tracker cont'd

2. Type in your **Password**
    a. **OPTIONAL**: "Remember Me on this Computer" – checking this box will allow users to be identified for login every time they use that specific computer.
3. Click on the **LOG IN** button
    a. Once selected, the log in button will take you to the My Dashboard screen
4. If you have forgotten your password, please contact your IT department for network password reset.
5. If you have any application issues or questions please call (412)350-4357 option 2 or send an email to sevicedesk@alleghenycounty.us

Section 2: Homepage - My Dashboard 2

Section 2: Homepage – My Dashboard

The Action Tracker Homepage as “My Dashboard” displays at log in and is customized to the user’s role. Each Information Screen expands and collapses to display and hide information.

1. Click to expand/collapse

When expanded, there are links embedded that will allow the user to view detail information related to Grants, Executive Actions (EA), and Contracts. There are also fields containing prepopulated information.

User Roles:

- ✓ Administrator
- ✓ Approver
- ✓ Creator
- ✓ Viewer

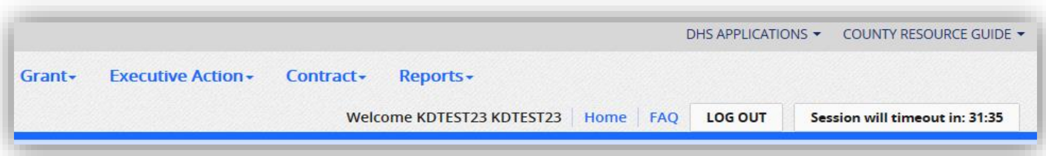
Section 2: Homepage - My Dashboard

2

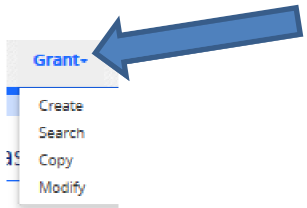
Process Menu and Quick Links Bar

Process Menu

The Process Menu houses dropdown lists to assist with commonly used tasks.



1. Click on each menu item and a dropdown box will display:



GRANT	EXECUTIVE ACTION	CONTRACT	REPORTS
Create	Create	Search	Reports List
Search	Search		
Copy	Copy		
Modify	Modify		

Table 1.2 Drop-Down Contents

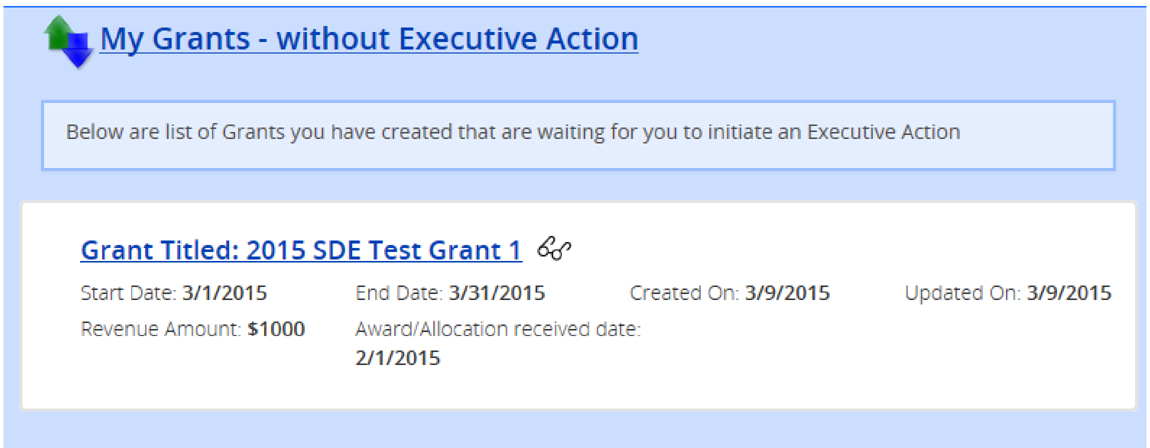
Other Menu Items

1. **Welcome:** Displays User Login information.
2. **Home:** Navigation link to Homepage.
3. **Log Out Button:** Used to log out of Action Tracker application.
4. **Session will timeout:** Security enhancement; will count down from 60 minutes with each page refresh.

Information Screens - Each section will provide active links and prepopulated data

My Grants – Without Executive Action

- This screen will only display grants which have been created and are waiting for an Executive Action to be initiated.



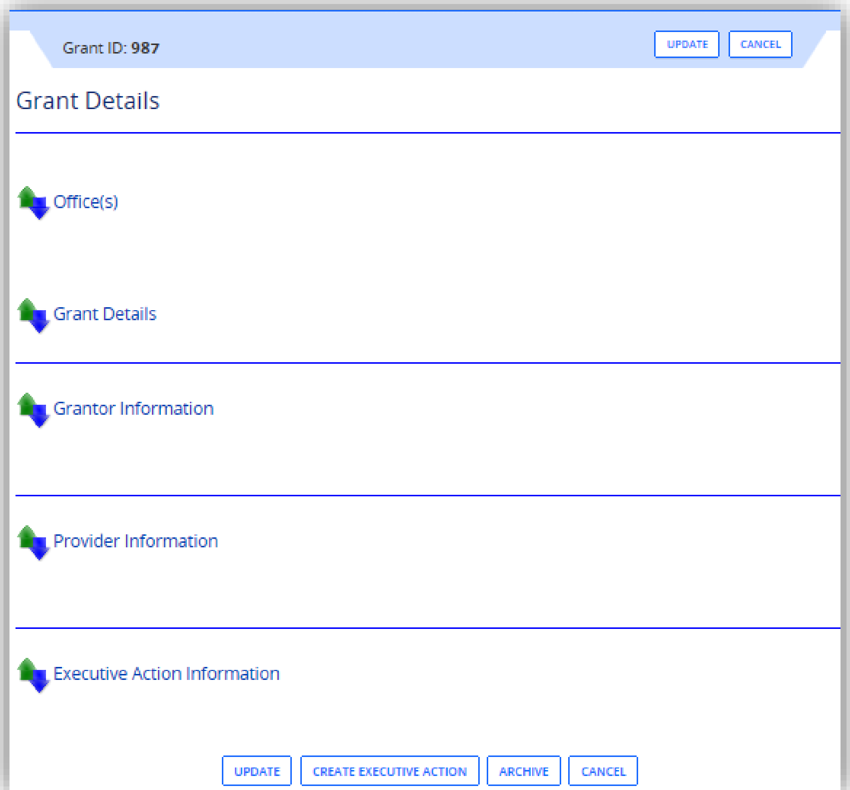
Title: Get to the details by clicking on the title or the [icon]

Prepopulated Fields:

1. **Start Date:** Displays the start date of the grant.
2. **End Date:** Displays the end date of the grant.
3. **Created On:** Displays the date the grant was created.
4. **Updated On:** Displays the date the grant was updated.
5. **Revenue Amount:** Displays the revenue amount of the grant.
6. **Award/Allocation received date:** Displays the "Award/Allocation received date" of the grant, if the user entered it when the grant was created.

Notes:

Details Screen -- My Grants – Without Executive Action Collapsed



Detail Screen Titles:

1. Office(s)
2. Grant Details
3. Grantor Information
4. Provider Information
5. Executive Action Information

Buttons

- **[Update]** – Allows user to update the grant details; brings up the "Create Grant Screen" (see Page 59).
- **[Create Executive Action]** - Takes user to the "Create Executive Action Screen" to enter a new EA, for this grant (see Page 65)
- **[Archive]:** Puts grant in Archive status; takes it off home page. Will appear only for the user who has created the grant.
- **[Cancel]** – Allows user to cancel the "Grant Details Screen", and return to the Homepage.

Details Screen -- My Grants – Without Executive Action Expanded

Grant ID: **978** CANCEL

Grant Details

Office(s)

Department	Office
Human Service(s)	Aging

First Previous 1 Next Last

Grant Details

Grant Title
2015 SDE Test Grant 1

Grant Activity
New Grant

Grant #
1000sde

Grant Term

Start date
3/1/2015

End date
3/31/2015

Explanation/Description

To restore fixtures in current residence

Notes

Grantor Requirements
Funds must be deposited in a separate account

Grantor Information

Grantors within the Grant

Grantor	Start Date	End Date	Amount	Need Contract
CITY OF MCKEESPORT	3/1/2015	3/31/2015	$1,000.00	Yes

First Previous 1 Next Last

Provider Information

Provider(s) within the Grant

Provider Name	Project Number	Amount	Fee?	Agreement Number	Need Contract?
ACTION-HOUSING INC		$1,000.00	No		Yes

First Previous 1 Next Last

Executive Action Information

Executive Action within this Grant

EA #	Executive Action Title	Status	Cost/Revenue Amount	Last User

First Previous Next Last

UPDATE CREATE EXECUTIVE ACTION ARCHIVE CANCEL

Details Screen -- My Grants – Without Executive Action Expanded cont'd

Prepopulated Fields:

Offices:
1. **Department:** Displays the department chosen at the time the grant was created.
2. **Office:** Displays the office or division, if any, chosen at the time the grant was created.

Grant Details:
1. **Grant Title:** Displays the title chosen at the time the grant was created.
2. **Grant Activity:** Displays the grant activity chosen at the time the grant was created.
3. **Grant #:** Displays the grant number generated at the time the grant was created.
4. **Grant Term:**
    - **Start Date:** Displays the start date chosen at the time the grant was created.
    - **End Date:** Displays the end date chosen at the time the grant was created.
5. **Explanation/Description:** Displays the text entered from the "Enter New Grant Screen".
6. **Notes:** Displays the text entered when the grant was created.
7. **Grantor Requirements:** Displays the selections chosen when creating the grant.

Grantor Information:
1. **Grantor:** Displays the grantor(s) selected when the grant was created.
2. **Start Date:** Displays the start date of each grantor.
3. **End Date:** Displays the end date of each grantor.
4. **Amount:** Displays dollar value entered by the user and associated with the grantor.
5. **Need Contract**: Displays the selection chosen for the grantor (yes or no).

Provider Information:
1. **Provider Name:** Displays provider's name chosen from the provider dropdown at the time the grant was created.
2. **Project Number:** Displays project number entered at the time the provider was entered.
3. **Amount:** Displays the amount associated with the provider at the time the provider was selected.
4. **Fee?** Displays the selection chosen at the time the provider was chosen (yes or no).
5. **Agreement Number**: Displays the value entered at the time the provider was chosen.

Details Screen -- My Grants – Without Executive Action Expanded cont'd

6. **Need Contract?** Displays the selection entered at the time the provider was chosen.

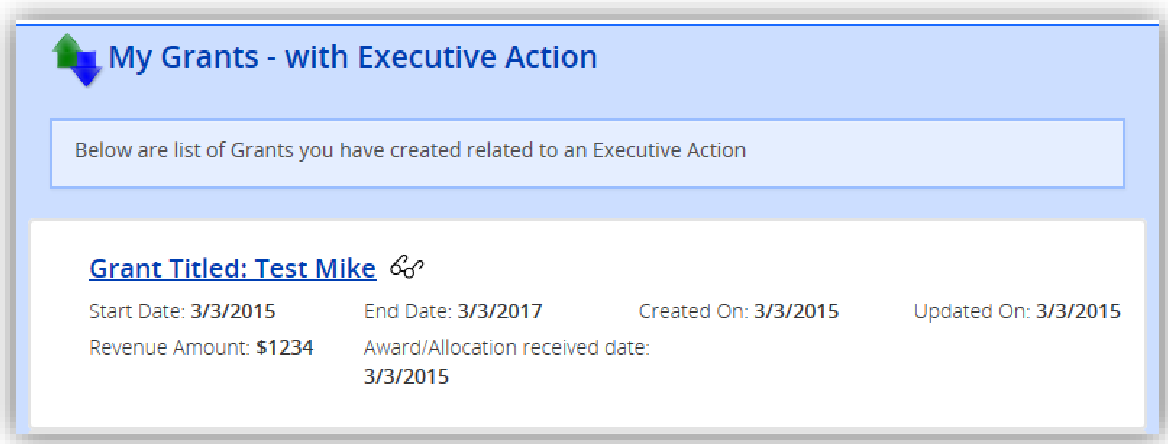
Executive Action Information:
1. No information because no EA is created for this Grant.

Buttons
- **[Update]** – Allows user to update the grant details; brings up the "Create Grant Screen" (see Page 59).
- **[Create Executive Action]** - Takes user to the "Create Executive Action Screen" to enter a new EA, for this grant (see Page 65)
- **[Archive]:** Puts grant in Archive status; takes it off home page. Will appear only for the user who has created the grant.
- **[Cancel]** – Allows user to cancel the "Grant Details Screen", and return to the Homepage.

Notes:

My Grants – with Executive Action

- This screen will only display grants for which you have created a related Executive Action.



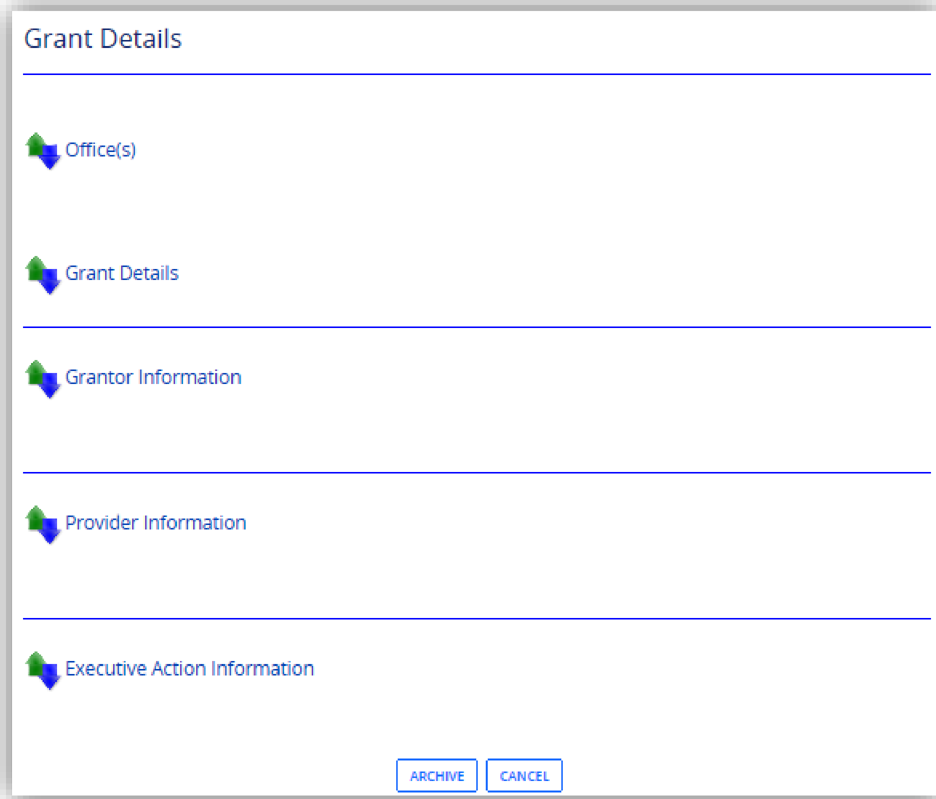
Title: Get to the details by clicking on the title or the [icon]

Prepopulated Fields:

1. **Start Date:** Displays the start date of the grant.
2. **End Date:** Displays the end date of the grant.
3. **Created On:** Displays the date the grant was created.
4. **Updated On:** Displays the date the grant was last updated.
5. **Revenue Amount:** Displays the revenue amount of the grant (sum of grants).
6. **Award/Allocation received date:** Displays the Award/Allocation received date of the grant.

Notes:

Details Screen -- My Grants – with Executive Action Collapsed



Detail Screen Titles:

1. Office(s)
2. Grant Details
3. Grantor Information
4. Provider Information
5. Executive Action Information

Buttons

- **[Archive]:** Puts grant in Archive status; takes it off home page. Will appear only for the user who has created the grant.
- **[Cancel]** – Allows user to cancel the Grant Details screen, and return to Homepage.

My Grants with Executive Action Details Page Expanded

Grant ID: **974**

CANCEL

Grant Details

Office(s)

Department	Office
Public Works	Bridge Division

First Previous 1 Next Last

Grant Details

Grant Title
Test Mike

Grant Activity
New Grant

Grant #
1234

Grant Term

Start date
3/3/2015

End date
3/3/2017

Explanation/Description

Grant from the FHWA to replace SQ03.

Notes

for SQ03

Grantor Requirements
Funds must be deposited in a separate account

Grantor Information

Grantors within the Grant

Grantor	Start Date	End Date	Amount	Need Contract
PENNSYLVANIA INFRASTRUCTURE INVESTMENT AUTHORITY	3/3/2015	3/3/2017	$1,234.00	Yes

First Previous 1 Next Last

Provider Information

Provider(s) within the Grant

Provider Name	Project Number	Amount	Fee?	Agreement Number	Need Contract?
PENNDOT	1234	$0.00	No	1245	Yes

First Previous 1 Next Last

Executive Action Information

Executive Action within this Grant

EA #	Executive Action Title	Status	Cost/Revenue Amount	Last User	
	SQ03 Grant	New	$0.00	KDTEST23 KDTEST23	Click here for Details

First Previous 1 Next Last

ARCHIVE CANCEL

My Grants with Executive Actions Details Page Expanded cont'd

Offices:
1. **Department:** Displays the department chosen at the time the grant was created.
2. **Office:** Displays the office or division, if any, chosen at the time the grant was created.

Grant Details:
1. **Grant Title:** Displays the title chosen at the time the grant was created.
2. **Grant Activity:** Displays the grant activity chosen at the time the grant was created.
3. **Grant #:** Displays the grant number generated at the time the grant was created.
4. **Grant Term:**
   - **Start Date:** Displays the start date chosen at the time the grant was created.
   - **End Date:** Displays the end date chosen at the time the grant was created.
5. **Award/Allocation Received Date:** Displays the date chosen from the "Enter New Grant Screen".
6. **Explanation/Description:** Displays the text entered from the "Enter New Grant Screen".
7. **Notes:** Displays the text entered when the grant was created.
8. **Grantor Requirements:** Displays the selections chosen when creating the grant.

Grantor Information:
1. **Grantor:** Displays the grantor(s) selected when the grant was created.
2. **Start Date:** Displays the start date of each grantor.
3. **End Date:** Displays the end date of each grantor.
4. **Amount:** Displays the dollar value entered by the user and associated with the grantor.
5. **Need Contract**: Displays the selection chosen for the grantor (yes or no).

Provider Information:
1. **Provider Name:** Displays provider's name chosen from the provider dropdown at the time the grant was created.
2. **Project Number:** Displays project number entered at the time the provider was entered.
3. **Amount:** Displays the amount associated with the provider at the time the provider was selected.
4. **Fee?** Displays the selection chosen at the time the provider was chosen.
5. **Agreement Number**: Displays the value entered at the time the provider was chosen.

My Grants with Executive Actions Details Page Expanded cont'd

6. **Need Contract?** Displays a "yes" or "no" based on the selection chosen associated with the provider

Executive Action Information:
1. **EA Number:** Displays the EA number generated when the EA was approved.
2. **Executive Action Title:** Displays the EA title entered by the user when the EA was created
3. **Status:** Displays the current status of the EA (new, pending, approved, etc.)
4. **Cost/Revenue Amount:** Displays the sum of the providers or grantors when the EA was created.
5. **Last User:** displays the last user associated with the EA.

Buttons
- **[Archive]:** Puts grant in Archive status; takes it off home page. Will appear only for the user who has created the grant.
- **[Cancel]** – Allows user to cancel the Grant Details screen, and return to Homepage.

Notes:

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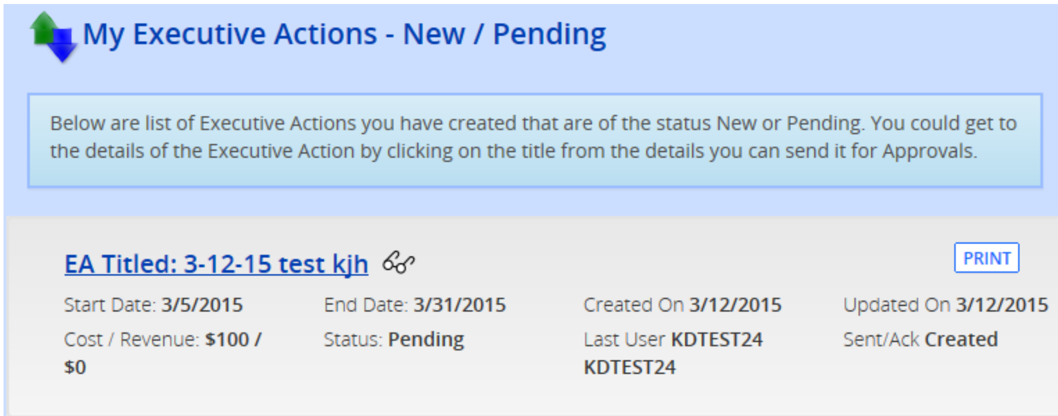
My Executive Actions – New/Pending

- This screen will only display Executive Actions you have created that are of the status New or Pending.



Title: Get to the details by clicking on the title or the [icon]

Prepopulated Fields:

1. **Start Date:** Displays the earliest date of a provider's contract associated with the EA. If related to a grant, will display the start and end date of the grant.
2. **End Date:** Displays the latest date of a provider's contract associated with the EA.
3. **Created On:** Displays the date the EA was created.
4. **Updated On:** Displays the date the EA was last updated.
5. **Cost/Revenue:** Displays the cost or revenue associated with the EA.
6. **Status:** Displays current status of the EA. (new, pending, or redo)
7. **Last User:** Displays the last user of the EA.
8. **Sent/Ack:** Displays state of the EA from the last user.

Buttons:
- **[Print]** Opens Request for EA for printing.

Notes:

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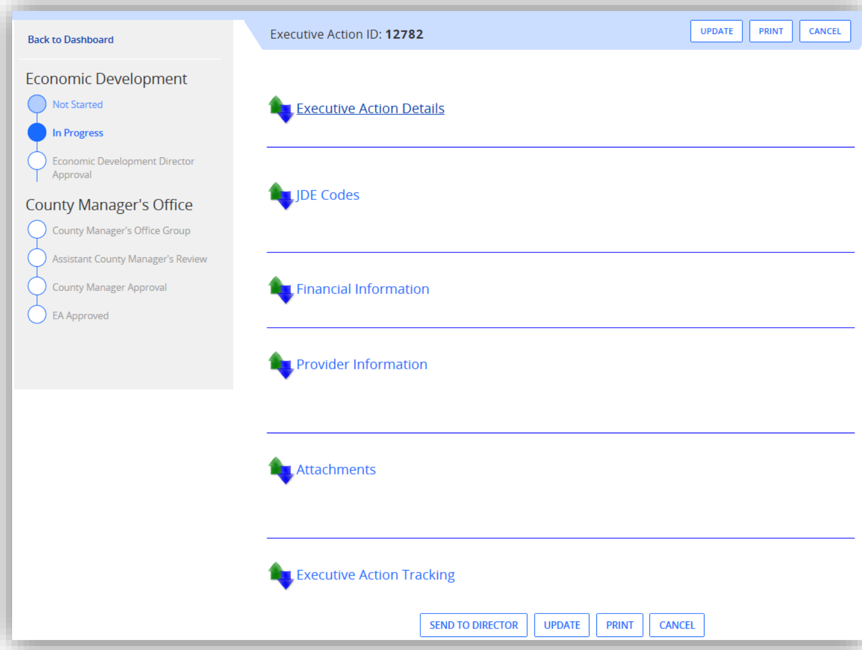
Details Screen -- My Executive Actions – New/Pending Collapsed



Progress Bar: The Progress or Tracking Bar allows you to monitor status.

Detail Screen Titles:

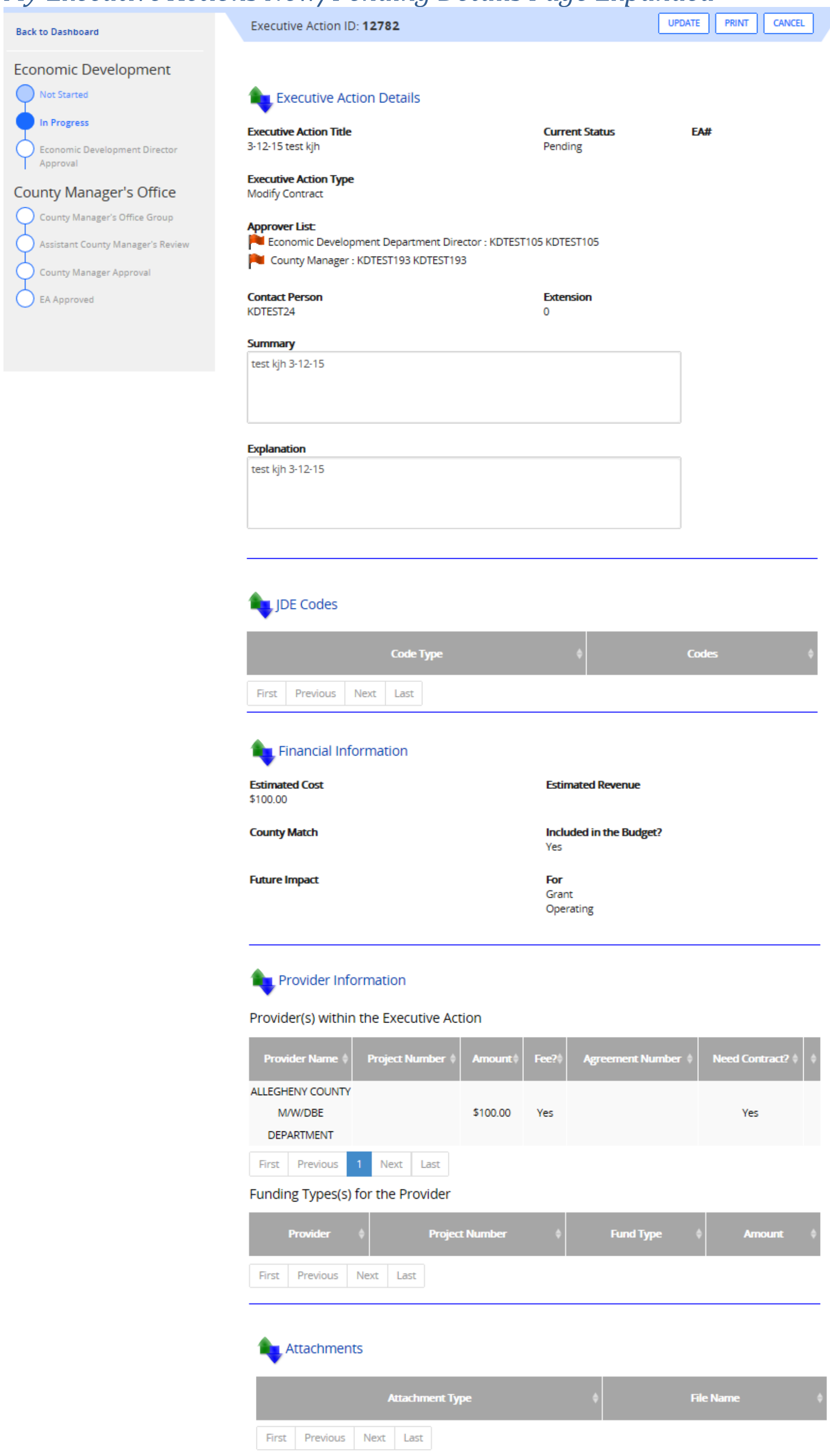
1. Executive Action Details
2. JDE Codes
3. Financial Information
4. Provider Information
5. Attachments
6. Executive Action Tracking

If the EA was created from a grant, the Grantor Information section will display on the EA Detail Screen.

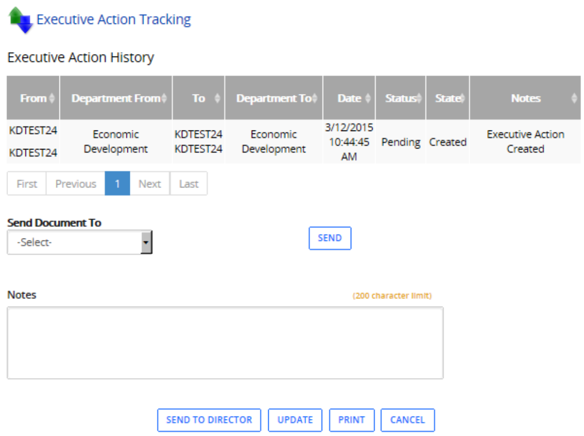
Buttons:

- **[Send to Director]:** Starts approval path for the EA. Will appear only for the user who created the EA record. (MAY READ DEPUTY DIRECTOR OR DIVISION MANAGER DEPENDING ON WORKFLOW REQUIREMENTS.)
- **[Update]:** Allows user to update the EA; brings up the Create EA Screen. Will appear only for the user who has created the EA record. Will not appear if the EA was created in MPER.
- **[PRINT]**: Will preview and display the updated EA for printing; Appears for all users at the top and bottom of screen.
- **[Cancel]:** Click on the button to cancel this screen and return to the homepage.

My Executive Actions New/Pending Details Page Expanded



My Executive Actions New/Pending Details Page Expanded cont'd



Prepopulated Fields:

Executive Action Details:
1. **Executive Action Title:** Displays the EA title.
2. **Current Status:** Displays the possible statuses of the EA.
3. **EA#:** Displays the system generated EA number after approval.
4. **Executive Action Types:** Displays the type of EA selected during the creation of the EA.
5. **Approver List:**
   - Green icon flag=approved.
   - Yellow icon flag=awaiting approval.
   - Red icon flag=not yet sent to this level for approval.
6. **Contact Person:** Displays the contact person associated with the EA.
7. **Extension:** Displays the contact person's extension associated with the EA.
8. **Summary:** Text populates from the "Enter New Executive Action Screen".
9. **Explanation:** Text populates from "Enter New Executive Action Screen" or prepopulates from grant details.

JDE Codes:
1. **Code Types:** Populates based on code types selected by the user for the EA.
2. **Code:** Values added for the EA.

Financial Information:
1. **Estimated Cost**: Populates based on cost associated with the EA.
2. **County Match:** Populates based on County match associated with the EA.
3. **Future: Impact:** Populates based on text entered in the text box associated with the EA.

My Executive Actions New/Pending Details Page Expanded cont'd

4. **Estimated Revenue:** Populates based on revenue that was entered associated with the EA.
5. **Included in the Budget?** Populates based on what was chosen as a yes or no.

Best Business Practice *says, 'The answers should be "Yes"; the County Manager's staff will likely return an EA for correction if the answer is "No".'*

Grant Information:

1. **Grants within the Executive Actions:** Displays the grant associated with the EA. Displays if a modification of the grant was completed or needed. If no grant is associated with EA, this section will be blank.
    a. **Mod #:** Tracks number of modifications.
    b. **Grant Title:** Displays the grant title when the grant was created.
    c. **Start Date:** Displays the grant, start date for the associated grant.
    d. **End Date:** Displays the grant, end date for the associated grant.
    e. **Amount:** Displays the amount associated with the grant.
    f. **Last user:** Displays the last user for the grant.
    g. **Link to Grant:** "Click here for details' – takes you to the "Grants Detail Screen".

2. **Grantors within the Executive Action:** Displays the grantor(s) associated with the grant; if there is a grantor associated with the EA. If no grant is associated with EA, the grid will display "No grantors exist within the Executive Action".
    a. **Grantor:** Displays the grantor name associated with the grant.
    b. **Start Date:** Displays the grantor, start date for the associated grant.
    c. **End Date:** Displays the grantor, end date for the associated grant.
    d. **Amount:** Displays the amount associated with the grantor for the grant.
    e. **Need Contract?** Displays a "yes" or "no" based on the selection chosen associated with the Grantor.
    f. **Link to Contract:** Displays a link to contract. Will display after the EA has a status of submitted and the user has clicked the "create contract" action button.

Provider Information:

1. **Provider(s) within the Executive Action:**
    a. **Provider Name:** Displays provider name.
    b. **Project Number:** Displays the project number associated with the provider.
    c. **Amount:** Displays the amount associated with the provider.
    d. **Fee?** Displays the "yes" or "no" value chosen.

My Executive Actions New/Pending Details Page Expanded

e. **Agreement Number:** Displays the agreement number associated with the provider.
f. **Need Contract?** Displays the "yes" or "no" value associated with the provider.
g. **Link to Contract:** Displays if "Need contract" = Yes, and after the user clicks the create contract button.

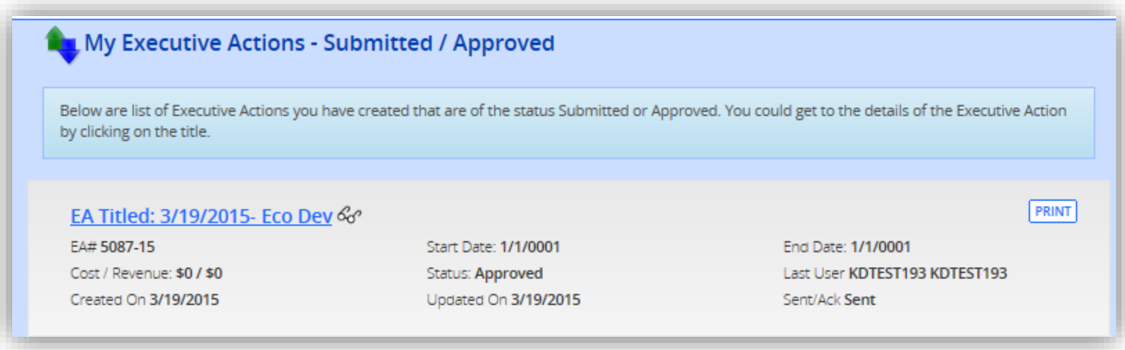
Attachments:
1. **Attachment Type:** Displays the attachment type based on the user.
2. **File Name:** Displays the link to the attachment noted in the grid**.**

Executive Action Tracking: (Progress of EA will display in reverse chronological order.)
1. **Executive Action History:**
    a. **From:** Displays the **user** that the EA came from.
    b. **Department From:** Displays the **department** that the EA came from.
    c. **To:** Displays the **user** that the EA is going to.
    d. **Department To:** Displays the **department** that the EA is going to.
    e. **Date:** Displays the history of the date and time the EA was created.
    f. **Status:** Displays the status of the EA.
    g. **State:** Displays the state of the EA.
    h. **Notes**: Displays the notes entered associated with the EA.

Buttons:
- **[Send to Director]:** Starts approval path for the EA. Will appear only for the user who created the EA record. (MAY READ DEPUTY DIRECTOR OR DIVISION MANAGER DEPENDING ON WORKFLOW REQUIREMENTS.)
- **[Update]:** Allows user to update the EA; brings up the Create EA Screen. Will appear only for the user who has created the EA record. Will not appear if the EA was created in MPER.
- **[Preview]**: Will preview the updated EA; Appears for all users at the top and bottom of screen.
- **[Cancel]:** Click on the button to cancel this screen and return to the homepage.

My Executive Actions – Submitted/Approved

- This screen will display a list of Executive Actions you have created that are of the status Submitted or Approved.



Title: Get to the details by clicking on the title or the [icon]

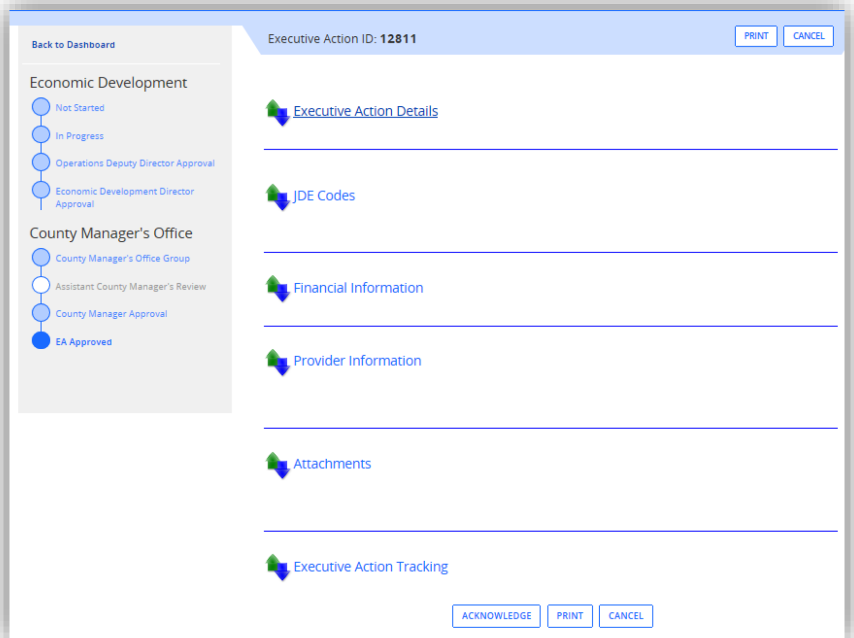
Prepopulated Fields:

1. **EA#:** Displays the approved EA number.
2. **Start Date:** Displays the earliest date of a provider's/grant contract associated with the EA.
3. **End Date:** Display the latest date of a provider's/grant contract associated with the EA.
4. **Cost/Revenue:** Displays the cost or revenue associated with the EA.
5. **Status:** Displays current status of the EA.
6. **Last User:** Displays the last user of the EA.
7. **Created On:** Displays the date the EA was created**.**
8. **Updated On:** Displays the date the EA was last updated.
9. **Sent/Ack:** Displays state of the EA from the last user.

Buttons:

- **[Print]** Opens Request for EA for printing.

Details Screen -- My Executive Actions – Submitted/Approved Collapsed



Progress Bar: The Progress or Tracking Bar allows you to monitor status

Detail Screen Titles:

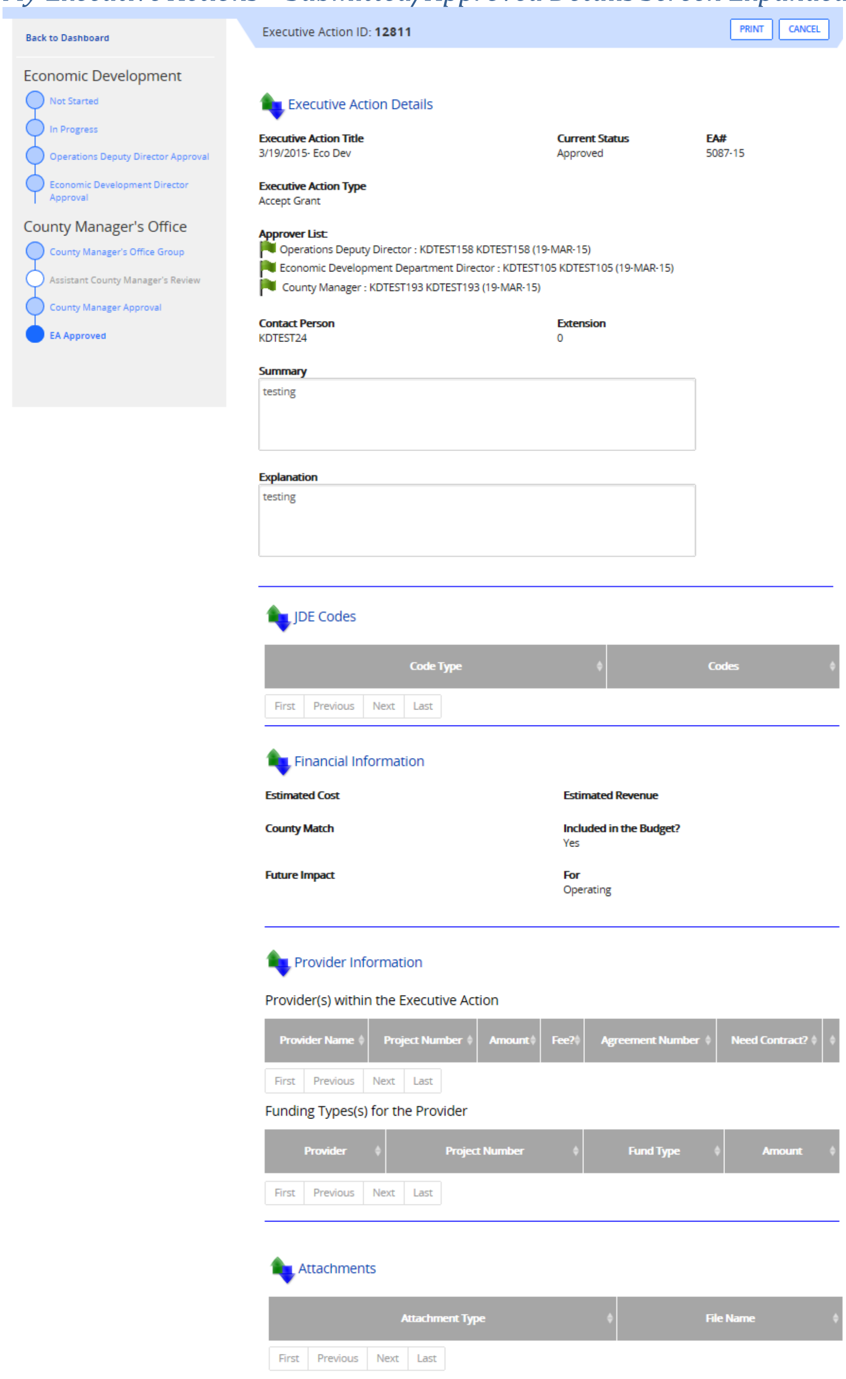
1. Executive Action Details
2. JDE Codes
3. Financial Information
4. Provider Information
5. Attachments
6. Executive Action Tracking

If the EA was created from a grant, the Grantor Information section will display on the EA Detail Screen.

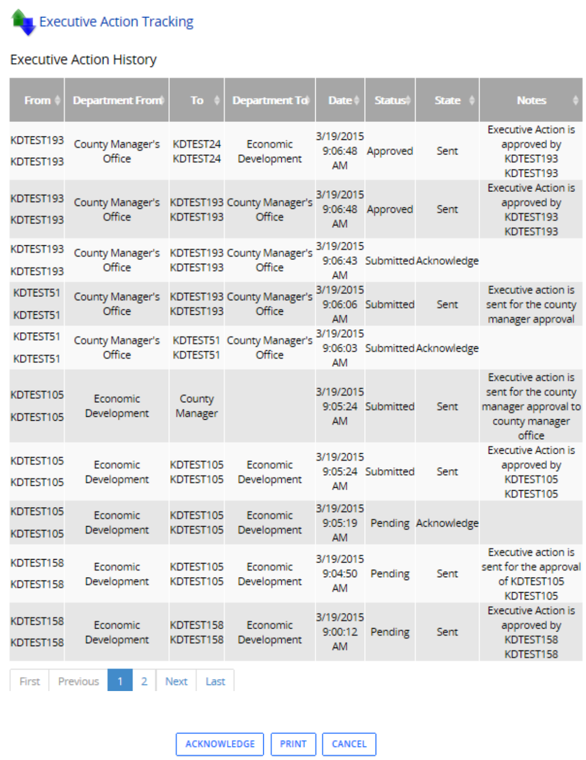
Buttons:

- **[Send to Director]:** Starts approval path for the EA. Will appear only for the user who created the EA record. (MAY READ DEPUTY DIRECTOR OR DIVISION MANAGER DEPENDING ON WORKFLOW REQUIREMENTS.)
- **[Update]:** Allows user to update the EA; brings up the Create EA Screen. Will appear only for the user who has created the EA record. Will not appear if the EA was created in MPER.
- **[Print]**: Will preview the updated EA; Appears for all users at the top and bottom of screen.
- **[Cancel]:** Click on the button to cancel this screen and return to the homepage.
- **[Acknowledge]:**

My Executive Actions – Submitted/Approved Details Screen Expanded



My Executive Actions – Submitted/Approved Details Screen Expanded cont'd


Executive Action Tracking

Executive Action History

From	Department From	To	Department To	Date	Status	State	Notes
KDTEST193 KDTEST193	County Manager's Office	KDTEST24 KDTEST24	Economic Development	3/19/2015 9:06:48 AM	Approved	Sent	Executive Action is approved by KDTEST193 KDTEST193
KDTEST193 KDTEST193	County Manager's Office	KDTEST193 KDTEST193	County Manager's Office	3/19/2015 9:06:48 AM	Approved	Sent	Executive Action is approved by KDTEST193 KDTEST193
KDTEST193 KDTEST193	County Manager's Office	KDTEST193 KDTEST193	County Manager's Office	3/19/2015 9:06:43 AM	Submitted	Acknowledge	
KDTEST51 KDTEST51	County Manager's Office	KDTEST193 KDTEST193	County Manager's Office	3/19/2015 9:06:06 AM	Submitted	Sent	Executive action is sent for the county manager approval
KDTEST51 KDTEST51	County Manager's Office	KDTEST51 KDTEST51	County Manager's Office	3/19/2015 9:06:03 AM	Submitted	Acknowledge	
KDTEST105 KDTEST105	Economic Development	County Manager		3/19/2015 9:05:24 AM	Submitted	Sent	Executive action is sent for the county manager approval to county manager office
KDTEST105 KDTEST105	Economic Development	KDTEST105 KDTEST105	Economic Development	3/19/2015 9:05:24 AM	Submitted	Sent	Executive Action is approved by KDTEST105 KDTEST105
KDTEST105 KDTEST105	Economic Development	KDTEST105 KDTEST105	Economic Development	3/19/2015 9:05:19 AM	Pending	Acknowledge	
KDTEST158 KDTEST158	Economic Development	KDTEST105 KDTEST105	Economic Development	3/19/2015 9:04:50 AM	Pending	Sent	Executive action is sent for the approval of KDTEST105 KDTEST105
KDTEST158 KDTEST158	Economic Development	KDTEST158 KDTEST158	Economic Development	3/19/2015 9:00:12 AM	Pending	Sent	Executive Action is approved by KDTEST158 KDTEST158

First Previous 1 2 Next Last

ACKNOWLEDGE PRINT CANCEL

Prepopulated Fields:

Executive Action Details:

1. **Executive Action Title:** Displays the EA title.
2. **Current Status:** Displays the current status of the EA.
3. **EA#:** Displays the system generated EA number after approval.
4. **Executive Action Types:** Displays the type of EA selected during the creation of the EA.
5. **Approver List:**
   - Green icon flag=approved
   - Yellow icon flag=awaiting approval
   - Red icon flag=means not yet sent to this level of approval.
6. **Contact Person:** Displays the contact person associated with the EA.
7. **Extension:** Displays the contact person's ext. associated with the EA.
8. **Summary:** Text populates from the "Enter New Executive Action Screen".

My Executive Actions – Submitted/Approved Details Screen Expanded cont'd

9. **Explanation:** Text populates from "Enter New Executive Action Screen" or prepopulates from grant details.

JDE Codes:
1. **Code Types:** Populates based on code types selected by the user for the EA.
2. **Code:** Values added for the EA.

Financial Information:
1. **Estimated Cost**: Populates based on cost associated with the EA.
2. **County Match:** Populates based on County match associated with the EA.
3. **Future: Impact:** Populates based on text entered in the text box associated with the EA.
4. **Estimated Revenue:** Populates based on revenue that was entered associated with the EA.
5. **Included in the Budget?** Populates based on what was chosen as a yes or no.

***Best Business Practice** says the answers should be "Yes"; the County Manager's staff will likely return an EA for correction if the answer is "No".*

Provider Information:
1. **Provider(s) within the Executive Action:**
   a. **Provider Name:** Displays provider name.
   b. **Project Number:** Displays the project number associated with the provider.
   c. **Amount:** Displays the amount associated with the provider.
   d. **Fee?** Displays the "yes" or "no" value chosen.
   e. **Agreement Number:** Displays the agreement number associated with the provider.
   f. **Need Contract?** Displays the "yes" or "no" value associated with the provider.
   g. **Link to Contract:** Displays if "Need contract" = Yes, and after the user clicks the create contract button.

Attachments:
1. **Attachment Type:** Displays the attachment type based on the user.
2. **File Name:** Displays the link to the attachment noted in the grid**.**

Executive Action Tracking: (Progress of EA will display in reverse chronological order.)
1. **Executive Action History:**
   a. **From:** Displays the **<u>user</u>** that the EA came from.

My Executive Actions – Submitted/Approved Details Screen Expanded cont'd

b. **Department From:** Displays the **department** that the EA came from.
c. **To:** Displays the **user** that the EA is going to.
d. **Department To:** Displays the **department** that the EA is going to.
e. **Date:** Displays the history of the date and time the EA was created.
f. **Status:** Displays the status of the EA.
g. **State:** Displays the state of the EA.
h. **Notes**: Displays the notes entered associated with the EA.

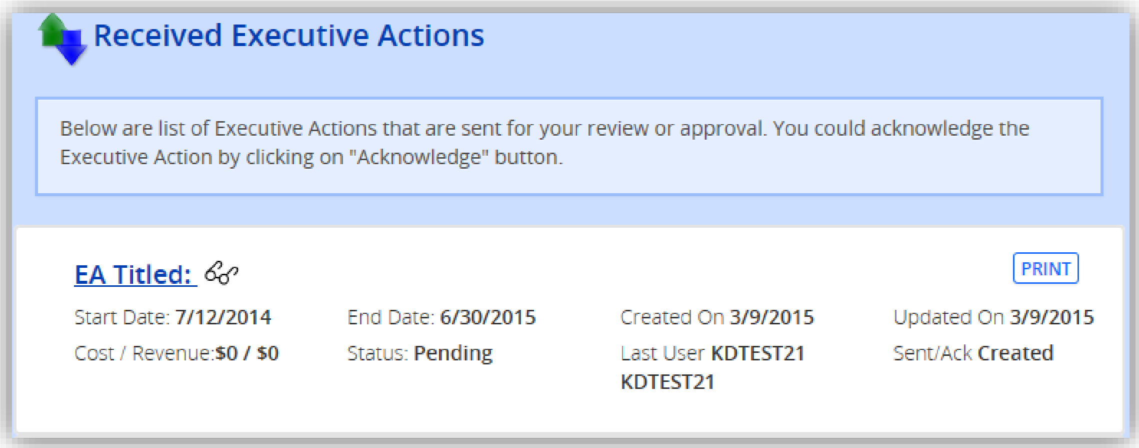
Buttons:

- **[Acknowledge]:** Acknowledges the receipt of the EA.
- **[Print]:** Opens the EA for printing.
- **[Cancel]:** Click on the button to cancel this screen and return to the Homepage.

Notes:

Received Executive Actions

- This screen will display a list of Executive Actions that are sent for your review or approval.



Title: Get to the details by clicking on the title or the [icon]

Prepopulated Fields:

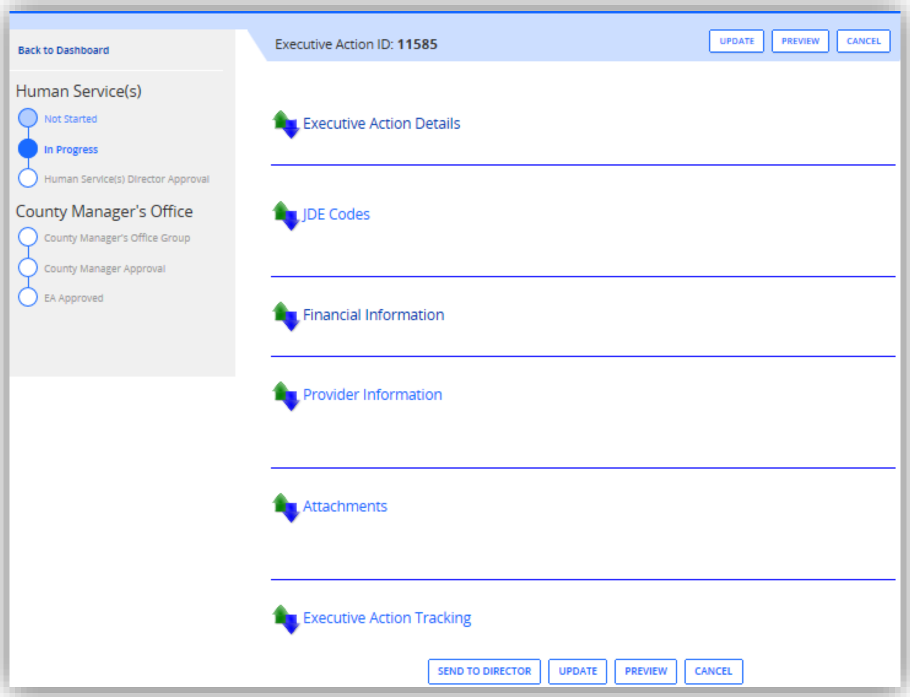
1. **Start Date:** Displays the earliest date of a provider's/grant contract associated with the EA.
2. **End Date:** Displays the latest date of a provider's/grant contract associated with the EA.
3. **Created On:** Displays the date the EA was created.
4. **Updated On:** Displays the date the EA was last updated.
5. **Cost/Revenue:** Displays the cost and revenue associated with the EA.
6. **Status:** Displays status of the EA.
7. **Last User:** Displays the last user of the EA.
8. **Sent/Ack:** Display state of the EA from the last user.

Buttons:

- **[Print]** Opens Request for EA for printing.

Notes:

Details Screen -- Received Executive Actions Collapsed



Progress Bar: The Progress or Tracking Bar allows you to monitor status

Detail Screen Titles:

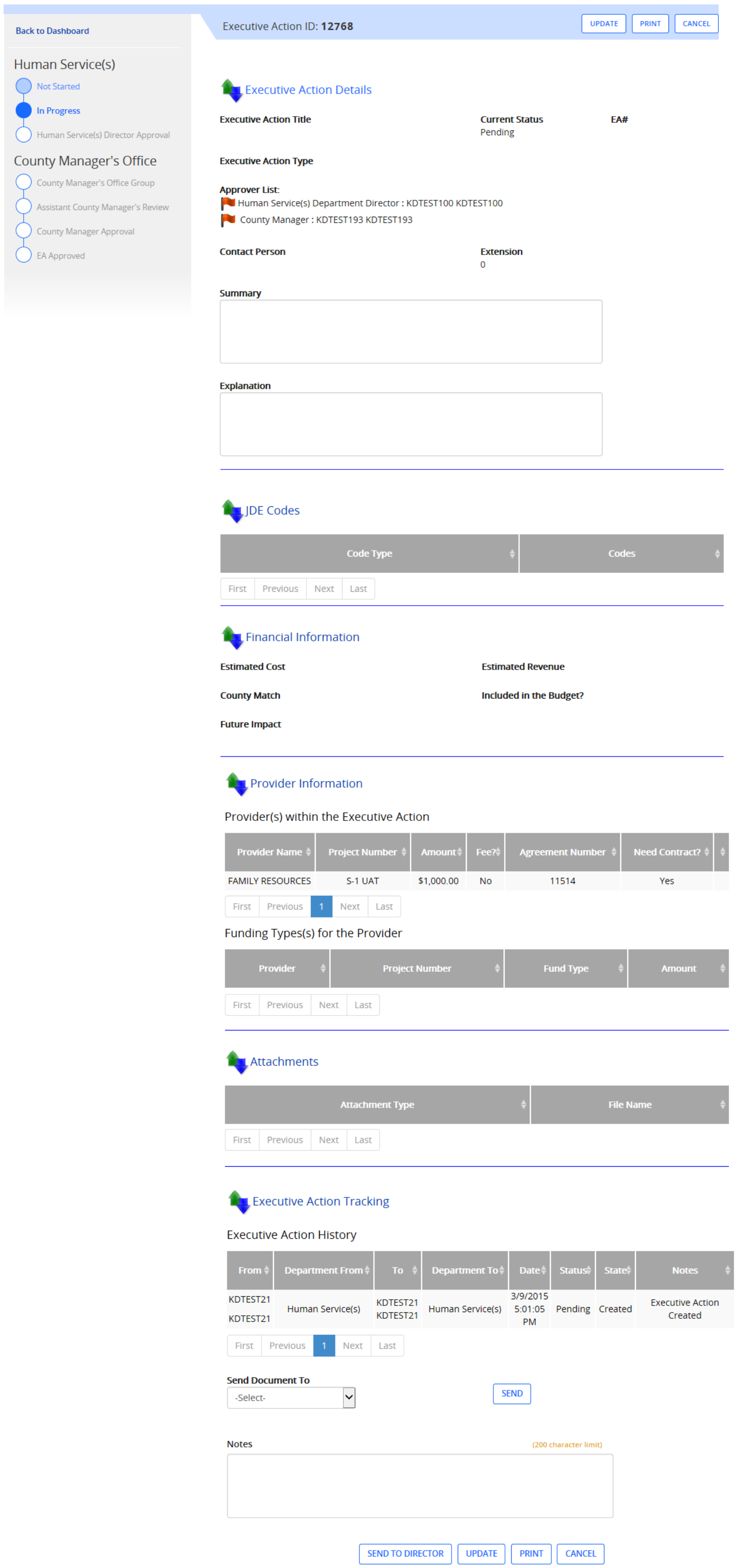
1. Executive Action Details
2. JDE Codes
3. Financial Information
4. Provider Information
5. Attachments
6. Executive Action Tracking

If the EA was created from a grant, the Grantor Information section will display on the EA Detail Screen.

Buttons:

- **[Send to Director]:** Starts approval path for the EA. Will appear only for the user who created the EA record. (MAY READ DEPUTY DIRECTOR DEPENDING OR DIVISION MANAGER ON WORKFLOW REQUIREMENTS.)
- **[Update]:** Allows user to update the EA; brings up the Create EA Screen. Will appear only for the user who has created the EA record. Will not appear if the EA was created in MPER.
- **[Print]**: Will preview the updated EA; Appears for all users at the top and bottom of screen.
- **[Cancel]:** Click on the button to cancel this screen and return to the Homepage.

Received Executive Actions Details Page Expanded



Received Executive Actions Details Page Expanded cont'd

Prepopulated Fields:

Executive Action Details:
1. **Executive Action Title:** Displays the EA title.
2. **Current Status:** Displays the possible current status of the EA.
3. **EA#:** Displays the system generated EA number after approval.
4. **Executive Action Types:** Displays the type of EA selected during the creation of the EA.
5. **Approver List:**
   Green icon flag=approved
   Yellow icon flag=awaiting approval
   Red icon flag=not yet sent to this level for approval.
6. **Contact Person:** Displays the contact person associated with the EA.
7. **Extension:** Displays the contact person's ext. associated with the EA.
8. **Summary:** Text populates from the "Enter New Executive Action Screen".
9. **Explanation:** Text populates from "Enter New Executive Action Screen" or prepopulates from grant details.

JDE Codes:
1. **Code Types:** Populates based on code types selected by the user for the EA.
2. **Code:** Values added for the EA.

Financial Information:
1. **Estimated Cost**: Populates based on cost associated with the EA.
2. **County Match:** Populates based on County match associated with the EA.
3. **Future: Impact:** Populates based on text entered in the text box associated with the EA.
4. **Estimated Revenue:** Populates based on revenue that was entered associated with the EA.
   Included in the Budget? Populates based on what was chosen as a yes or no.

***Best Business Practice** says, 'The answers should be "Yes"; the County Manager's staff will likely return an EA for correction if the answer is "No".'*

Provider Information:
1. **Provider(s) within the Executive Action:**
   a. **Provider Name:** Displays provider name.
   b. **Project Number:** Displays the project number associated with the provider.
   c. **Amount:** Displays the amount associated with the provider.

Received Executive Actions Details Page Expanded cont'd

   d. **Fee?** Displays the yes or no value chosen.
   e. **Agreement Number:** Displays the agreement number associated with the provider.
   f. **Need Contract?** Displays the "yes" or "no" value associated with the provider.
   g. **Link to Contract:** Displays if "Need contract" = Yes, and after the user clicks the create contract button.

Attachments:
1. **Attachment Type:** Displays the attachment type based on the user.
2. **File Name:** Displays the link to the attachment noted in the grid**.**

Executive Action Tracking: (Progress of EA will display in reverse chronological order.)
1. **Executive Action History:**
   a. **From:** Displays the **<u>user</u>** that the EA came from.
   b. **Department From:** Displays the **<u>department</u>** that the EA came from.
   c. **To:** Displays the **<u>user</u>** that the EA is going to.
   d. **Department To:** Displays the **<u>department</u>** that the EA is going to.
   e. **Date:** Displays the history of the date and time the EA was created.
   f. **Status:** Displays the status of the EA.
   g. **State:** Displays the state of the EA.
   h. **Notes**: Displays the notes entered associated with the EA.

- **Send Document to:** Choose user from dropdown screen if displayed.
- **Notes:** Can type any text in box; 200 character limit.

Buttons:
- **[Send to Director]:** Starts approval path for the EA. Will appear only for the user who created the EA record. (MAY READ DEPUTY DIRECTOR DEPENDING OR DIVISION MANAGER ON WORKFLOW REQUIREMENTS.)
- **[Update]:** Allows user to update the EA; brings up the Create EA Screen. Will appear only for the user who has created the EA record. Will not appear if the EA was created in MPER.
- **[Preview]**: Will preview the updated EA; Appears for all users at the top and bottom of screen.
- **[Cancel]:** Cancels the screen and returns to the Homepage.

My Contracts – New/Active

- This screen will display a list of Contracts you have created that are of the status New and Active.

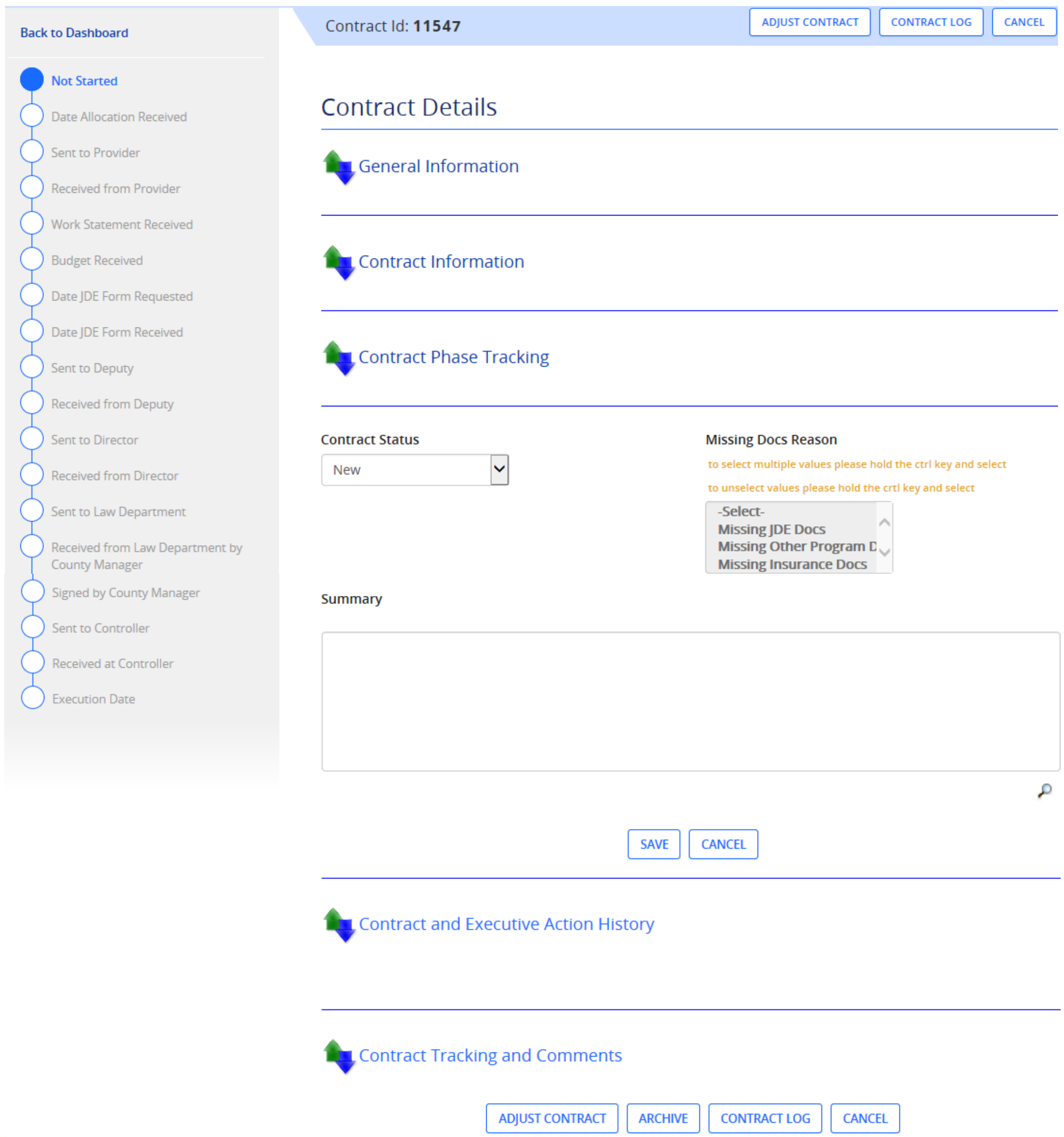
Title: Get to the details by clicking on the title or the [icon]
Best Business Practice: Title of contract is a concatenation of the EA title and Grant name.

Prepopulated Fields:

1. **Provider/Grantor:** Displays the title of the provider associated with the contract.
2. **Cost/Revenue:** Displays cost or revenue of the contract.
3. **Created On:** Displays the date the contract was created on.
4. **Updated On:** Displays the date the contract was updated on.
5. **Status:** Displays the status of the contract.
6. **Start Date:** Displays the start date of the contract.
7. **End Date:** Displays the end date of the contract.
8. **Sent/Ack:** Displays state of the contract from the last user.
9. **Last User:** Displays the last user of the contract.

Notes:

Details Screen – My Contracts – New/Active Collapsed



Progress Bar: The Progress or Tracking Bar allows you to monitor status

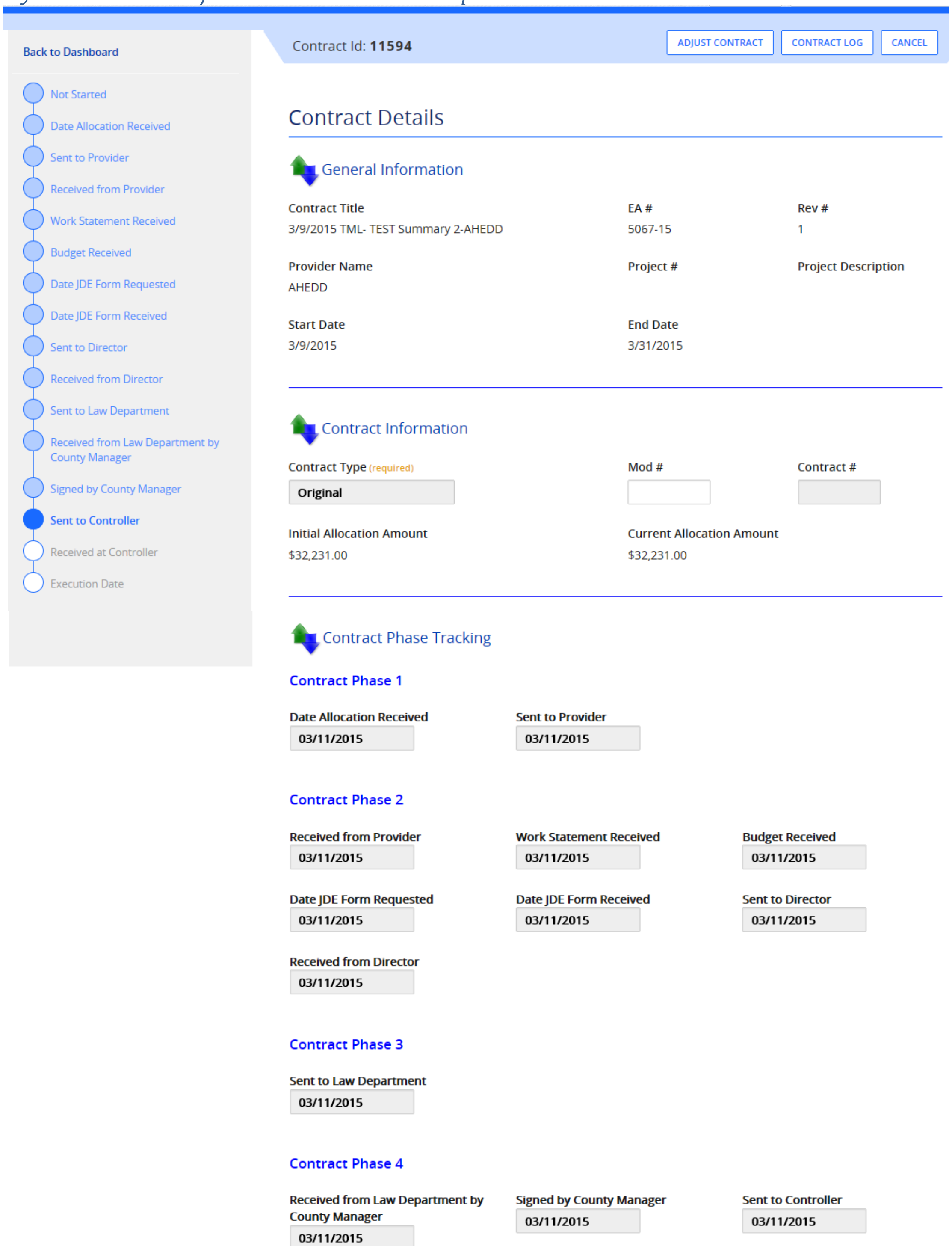
Details Screen - My Contracts – New/Active cont'd

Detail Screen Titles:
1. General Information
2. Contract Information
3. Contract Phase Tracking
4. Contract and Execution Action History
5. Contract Tracking and Comments

Buttons:
- **[Adjust Contract]:** Takes the user to the adjust contract page, to adjust the dollar amount of the contract. ***Best Business Practice*** *says, "Adjustments can only be handled in this manner if preauthorization is given in the original EA."*
- **[Archive]:** Puts the contract in the archive status and takes it off of home page.
- **[Contract Log]:** Opens the cover page of the contract for printing. Will appear to all the users, primarily used by the County Manager.
- **[Cancel]:** Cancels the screen and returns to the home page.

Notes:

My Contract – New/Active Details Screen Expanded



My Contract – New/Active Details Screen Expanded cont'd

Contract Phase 5

Received at Controller

Contract Status

Active

Missing Docs Reason

to select multiple values please hold the ctrl key and select

to unselect values please hold the crtl key and select

-Select-
Missing JDE Docs
Missing Other Program D
Missing Insurance Docs

Notes

fdfsd

CANCEL

Contract Tracking and Comments

Contract Tracking

From	Department From	To	Department To	Date	Changed By	Status	State	Notes
KDTEST51 KDTEST51	County Manager's Office	Controller Group		3/11/2015 5:09:49 PM	KDTEST51	Active	Sent	
KDTEST51 KDTEST51	County Manager's Office	KDTEST51 KDTEST51	County Manager's Office	3/11/2015 5:09:44 PM	KDTEST51	Active	Updated	

First Previous 1 Next Last

Comment Log

Responsible Party	Comments	Made By	Date

First Previous Next Last

Responsible Party

-Select-

Send Email

Comments

ADJUST CONTRACT | ARCHIVE | CONTRACT LOG | CANCEL

My Contract – New/Active Details Screen Expanded cont'd

Prepopulated Fields:

General Information:
1. **Contract Title**: Displays the title of the contract and the link to the actual contract.
2. **EA#:** Displays the EA number associated with the contract.
3. **Rev #:** If a revision has been made, the revision number associated with the contract will display.
4. **Provider Name:** Displays the title of the provider/grantor associated with the contract.
5. **Project #:** Displays project number associated with the contract.
6. **Project Description:** Displays project description associated with the contract.
7. **Start Date:** Displays the start date of the contract.
8. **End Date:** Displays the end date of the contract.

Contract Information:
1. **Contract Type:** Displays the type of the contract associated with the EA.
2. **Mod Number:** Displays modification number that is associated with the contract.
3. **Contract Number:** Displays contract number that is associated with the contract and is completed by the Controller's office later in the process unless this is an amendment for which the creator had the original agreement number.
4. **Initial Allocation Amount:** Displays Initial allocation that is associated with the contract.
5. **Current Allocation Amount:** Displays most current allocation that is associated with the contract.

Contract Phase Tracking
1. **Contract Phase – 1**: After this information is entered, Phase 2 fields will become active.
    a. **Date Allocation Received:** Displays the date allocation for contract was received.
    b. **Sent to Provider:** Displays the date contract was sent to provider.
2. **Contract Phase – 2:**
    a. **Received from Provider:** Displays date contract received from provider.
    b. **Work Statement Received:** Displays date Work Statement received.
    c. **Budget Received:** Displays the date budget was received.
    d. **JDE Form Requested:** Displays the date JDE form requested.
    e. **JDE Form Received:** Displays the date JDE form received.
    f. **Sent To Director:** Displays the date contract sent to Director.
    g. **Received From Director:** Displays the date contract received from Director.

My Contract – New/Active Details Screen Expanded cont'd

3. **Contract Phase – 3:**
    a. **Sent to Law Department:** Displays the date contract sent to Law Department.
4. **Contract Phase – 4:**
    a. **Received from Law Department by County Manger:** Displays the date contract received from Law Department by County Manager.
    b. **Signed by County Manager:** Displays the date contract signed by County Manager.
    c. **Sent to Controller:** Displays the date sent to Controller.
5. **Contract Phase- 5**
    a. **Received at Controller:** Displays the date contract received at Controller.
6. **Contract Status:** Displays the applicable contract status.
7. **Missing Docs Reason:** If selected, displays type of documents missing.
8. **Notes:** If text was enter, will prepopulate information.

Contract and Executive Action History:
1. **Contract History:**
    a. **Seq #:** Displays sequence numbers in order based on the number of sequential changes to the contract (i.e. amendments, adjustments).
    b. **Type:** Displays contract type for the selected contract.
    c. **Rev #:** Displays revision numbers in sequential order based on number of revisions made to contract.
    d. **Last User:** Displays last user in Action Tracker for this contract.
    e. **Amount:** Displays the current amount of the contract.
    f. **Change:** Displays the change amount entered for the contract.
    g. **Update Date:** Date populates from the date that the change was created in Action Tracker.
2. **Executive Action for this Contract:**
    a. **EA#:** Displays EA number for selected EA.
    b. **Date Created:** Displays date created from selected EA.
    c. **Office:** Displays office associated with selected EA.
    d. **Title:** Displays title of selected EA.
    e. **Amount:** Displays amount associated with selected EA.
    f. **Date Submitted:** Displays date selected EA was submitted to the County Manager's Office.
    g. **Status:** Displays the most current status of the selected EA.

My Contract – New/Active Details Screen Expanded cont'd

Contract Tracking and Comments: (Progress of contract will display in reverse chronological order.)
From: Displays the history of the contract, and who it was sent from.

1. **Department From:** Displays the history of the contract, and what department it was sent from.
2. **To:** Displays the history of the contract, and who it was sent to.
3. **Department To:** Displays the history of the contract, and what department it was sent to.
4. **Date:** Displays the history of the date and time the contract was created.
5. **Changed by:** Displays the person who changed the contract.
6. **Status:** Displays the history of the latest status of the contract.
7. **State:** Displays the history of the latest state of the contract.
8. **Notes:** Displays the history of the notes regarding the contract.

Comment Log:

1. **Responsible Party:** Displays the party responsible for action identified in the comment.
2. **Comments:** Displays the text entered by a user as a comment regarding the contract.

   Best Business Practice:
   Comments are entered by users to help viewers understand why delays may have or are occurring. For example a DHS Contracts user may comment the responsible party is the Provider and make a comment that the insurance is not yet received and provider was notified

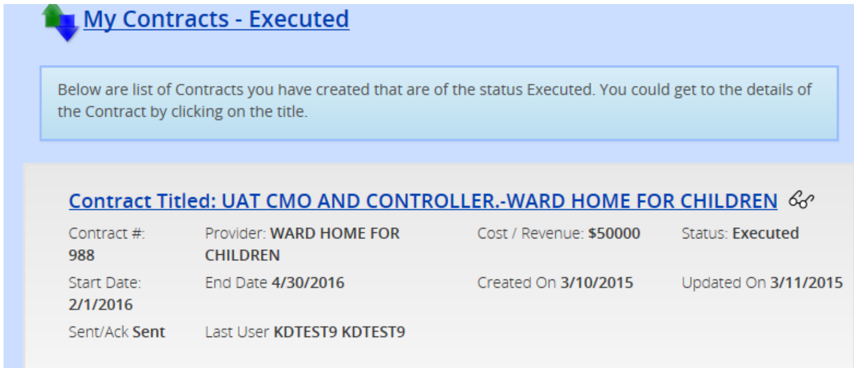
Buttons

- **[Adjust Contract** Takes the user to the "Adjust Contract Page", to adjust the dollar amount of the contract. Not available for contracts that come from MPER.
- **[Archive]** Puts the contract in the archive status and takes it off of their home page.
- **[Contract Log]** Opens the cover page of the contract for printing. Will appear to all the users, primarily used by the County Manager.
- **[Cancel]** Cancels the screen and returns to the home page.

Notes:

My Contracts - Executed

- This screen will display a list of Contracts you have created that are of the status Executed.



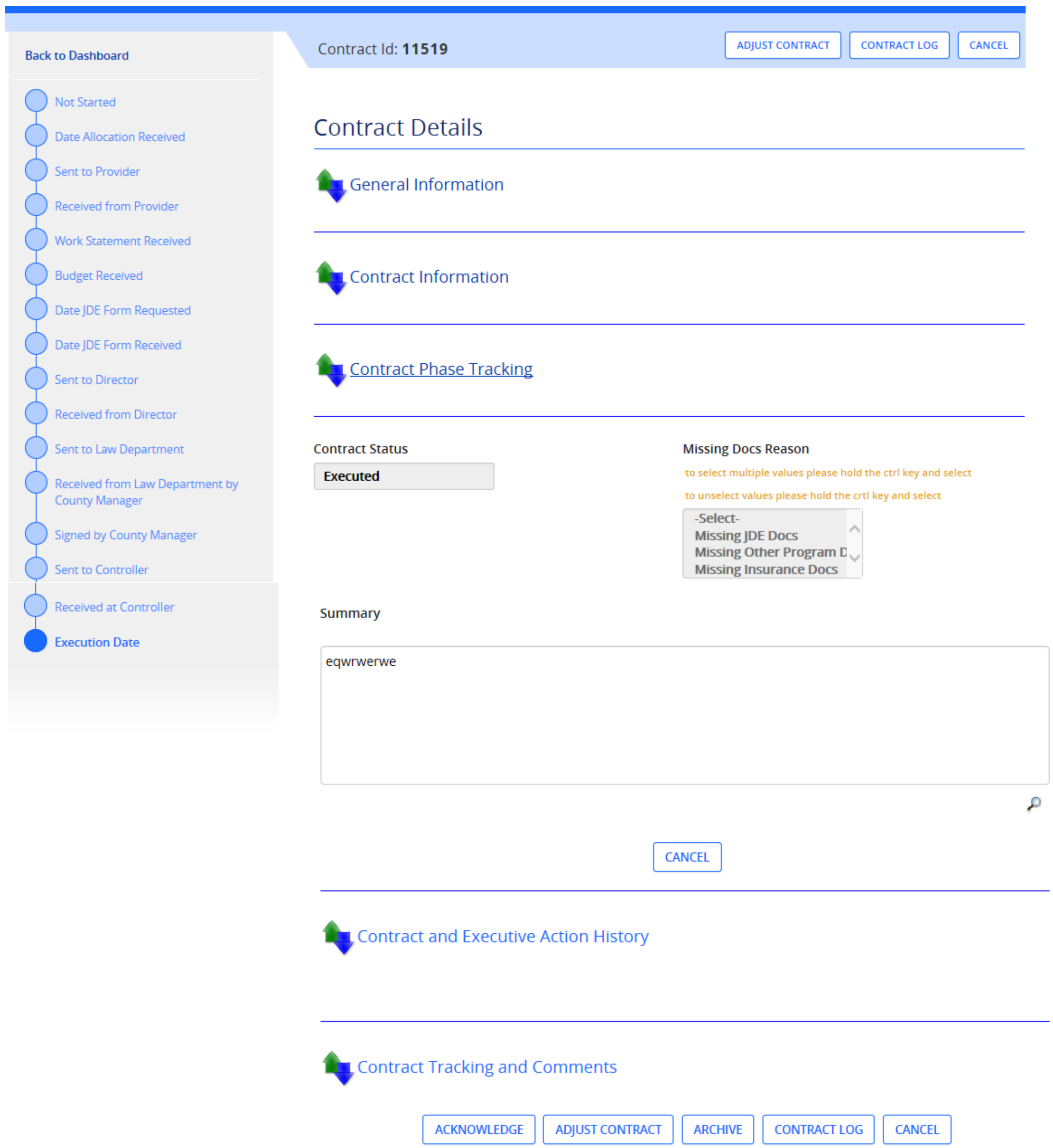
Title: Get to the details by clicking on the title or the  [icon]

Prepopulated Fields:

1. **Contract #:** Displays the Contract number of the executed contract.
2. **Provider:** Displays the title of the provider associated with the contract.
3. **Cost/Revenue:** Displays cost or revenue of the contract.
4. **Status:** Displays the status of the contract.
5. **Start Date:** Displays the start date of the contract.
6. **End Date:** Displays the end date of the contract.
7. **Created On:** Displays the date the contract was created on.
8. **Updated On:** Displays the date the contract was updated on.
9. **Sent/Ack:** Displays state of the contract from the last user.
10. **Last User:** Displays the last user of the contract.

Notes:

Details Screen – My Contracts – Executed Collapsed



Progress Bar: The Progress or Tracking Bar allows you to monitor status

Details Screen – My Contracts – Executed cont'd

Detail Screen Titles:

1. General Information
2. Contract Information
3. Contract Phase Tracking
4. Contract and Execution Action History
5. Contract Tracking and Comments

Buttons:

- **[Acknowledge]:** Acknowledges the receipt of the contract record in Action Tracker. This is the first option to perform before any action.
- **[Adjust Contract]:** Takes the user to the adjust contract page, to adjust the dollar amount of the contract.
- **[Archive]:** Puts the contract in the archive status and takes it off of home page.
- **[Contract Log]:** Opens the cover page of the contract for printing. Will appear to all the users, primarily used by the County Manager.
- **[Cancel]:** Cancels the screen and returns to the home page.

Notes:

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My Contracts – Executed Details Screen Expanded

Back to Dashboard

- Not Started
- Date Allocation Received
- Sent to Provider
- Received from Provider
- Work Statement Received
- Budget Received
- Date JDE Form Requested
- Date JDE Form Received
- Sent to Director
- Received from Director
- Sent to Law Department
- Received from Law Department by County Manager
- Signed by County Manager
- Sent to Controller
- Received at Controller
- Execution Date

Contract Id: **11596**

ADJUST CONTRACT | CONTRACT LOG | CANCEL

Contract Details

General Information

Contract Title	EA #	Rev #
UAT CMO AND CONTROLLER.-WARD HOME FOR CHILDREN	5071-15	1
Provider Name	**Project #**	**Project Description**
WARD HOME FOR CHILDREN	UAT CONTROL#3	
Start Date	**End Date**	
2/1/2016	4/30/2016	

Contract Information

Contract Type (required)	Mod #	Contract #
Original		988
Initial Allocation Amount	**Current Allocation Amount**	
$50,000.00	$50,000.00	

Contract Phase Tracking

Contract Phase 1

Date Allocation Received	Sent to Provider
01/01/2012	02/01/2012

Contract Phase 2

Received from Provider	Work Statement Received	Budget Received
02/02/2012	02/02/2012	02/02/2012
Date JDE Form Requested	**Date JDE Form Received**	**Sent to Director**
02/02/2012	02/02/2012	02/03/2012
Received from Director		
02/04/2012		

Contract Phase 3

Sent to Law Department
03/10/2015

Contract Phase 4

Received from Law Department by County Manager	Signed by County Manager	Sent to Controller
03/11/2015	03/11/2015	03/11/2015

Contracts – Executed Details Screen Expanded cont'd

Contract Phase 6

Execution Date
03/11/2015

Contract Status
Executed

Missing Docs Reason
to select multiple values please hold the ctrl key and select
to unselect values please hold the crtl key and select
-Select-
Missing JDE Docs
Missing Other Program D
Missing Insurance Docs

Summary

CANCEL

Contract and Executive Action History

Contract History

Seq #	Type	Rev #	Last User	Amount	Change	Update Date	
1	Original	0	KDTEST21 KDTEST21	$50,000.00	0	3/10/2015	Click here for Details

First Previous 1 Next Last

Executive Action for this Contract

EA Number	Date Created	Office	Title	Amount	Date Submitted	Status	
5071-15	3/10/2015	Human Service(s)	UAT CMO AND CONTROLLER.	$100,000.00	3/10/2015	Approved	Click here for Details

First Previous 1 Next Last

Contract Tracking and Comments

ACKNOWLEDGE ADJUST CONTRACT ARCHIVE CONTRACT LOG CANCEL

Contracts – Executed Details Screen Expanded cont'd

Prepopulated Fields:

General Information

1. **Contract Title**: Displays the title of the contract and the link to the actual contract.
2. **EA#:** Displays the EA number associated with the contract.
3. **Rev #:** If a revision has been made, the revision number associated with the contract will display.
4. **Provider Name:** Displays the title of the provider/grantor associated with the contract.
5. **Project #:** Displays project number associated with the contract.
6. **Project Description:** Displays project description associated with the contract.
7. **Start Date:** Displays the start date of the contract.
8. **End Date:** Displays the end date of the contract.

Contract Information:

1. **Contract Type:** Displays the type of the contract associated with the EA.
2. **Mod #:** Displays modification number that is associated with the contract.
3. **Contract Number:** Displays contract number that is associated with the contract and is completed by the Controller's office later in the process unless this is an amendment for which the creator had the original agreement number.
4. **Initial Allocation Amount:** Displays initial allocation that is associated with the contract.
5. **Current Allocation Amount:** Displays most current allocation that is associated with the contract.

Contract Phase Tracking

1. **Contract Phase – 1**: After this information is entered, Phase 2 fields will become active.
   a. **Date Allocation Received:** Displays the date allocation for contract was received.
   b. **Sent to Provider:** Displays the date contract was sent to provider.
2. **Contract Phase – 2:**
   a. **Received from Provider:** Displays date contract received from provider.
   b. **Work Statement Received:** Displays date Work Statement received.
   c. **Budget Received:** Displays the date budget was received.
   d. **JDE Form Requested:** Displays the date JDE form requested.
   e. **JDE Form Received:** Displays the date JDE form received.
   f. **Sent To Director:** Displays the date contract sent to Director.
   g. **Received From Director:** Displays the date contract received from Director.

Contracts – Executed Details Screen Expanded cont'd

3. **Contract Phase – 3:**
    a. **Sent to Law Department:** Displays the date contract sent to Law Department.
4. **Contract Phase – 4:**
    a. **Received from Law Department by County Manger:** Displays the date contract received from Law Department by County Manager.
    b. **Signed by County Manager:** Displays the date contract signed by County Manager.
    c. **Sent to Controller:** Displays the date sent to Controller.
5. **Contract Phase- 5**
    a. **Received at Controller:** Displays the date contract received at Controller.
6. **Contract Phase-6**
    a. **Execution Date:** Displays contract End date.
7. **Contract Status:** Displays the applicable contract status.
8. **Missing Docs Reason:** If selected, displays type of documents missing.
9. **Notes:** If text was enter, will prepopulate information.

Contract and Executive Action History:

1. **Contract History:**
    a. **Seq #:** Displays sequence numbers in order based on the number of sequential changes to the contract (i.e. amendments, adjustments).
    b. **Type:** Displays contract type for the selected contract.
    c. **Rev #:** Displays revision numbers in sequential order based on number of revisions made to contract.
    d. **Last User:** Displays last user in Action Tracker for this contract.
    e. **Amount:** Displays the current amount of the contract.
    f. **Change:** Displays the change amount entered for the contract.
    g. **Update Date:** Date populates from the date that the change was created in Action Tracker.

2. **Executive Action for this Contract:**
    a. **EA#:** Displays EA number for selected EA.
    b. **Date Created:** Displays date created from selected EA.
    c. **Office:** Displays office associated with selected EA.
    d. **Title:** Displays title of selected EA.
    e. **Amount:** Displays amount associated with selected EA.
    f. **Date Submitted:** Displays date selected EA was submitted to the County Manager's Office.
    g. **Status:** Displays the most current status of the selected EA.

Contracts – Executed Details Screen Expanded cont'd

Contract Tracking and Comments: (Information displays in reverse chronological order.)

1. **From:** Displays the history of the contract, and who it was sent from.
2. **Department From:** Displays the history of the contract, and what department it was sent from.
3. **To:** Displays the history of the contract, and who it was sent to.
4. **Department To:** Displays the history of the contract, and what department it was sent to.
5. **Date:** Displays the history of the date and time the contract was created.
6. **Changed by:** Displays the person who changed the contract.
7. **Status:** Displays the history of the latest status of the contract.
8. **State:** Displays the history of the latest state of the contract.
9. **Notes:** Displays the history of the notes regarding the contract.

Comment Log:

1. **Responsible Party:** Displays the party responsible for the action identified in the comment.
2. **Comments:** Displays the text entered by a user as a comment regarding the contract.

***Best Business Practice** says "Comments are entered by users to help viewers understand why delays may have or are occurring. For example a DHS Contracts user may comment the responsible party is the Provider and make a comment that the insurance is not yet received and provider was notified."*

Buttons:

- **[Acknowledge]:** Acknowledges the receipt of the contract. This is the first option to perform before any action.
- **[Adjust Contract]:** Takes the user to the adjust contract page, to adjust the dollar amount of the contract.
- **[Archive]:** Puts the contract in the archive status and takes it off of home page.
- **[Contract Log]:** Opens the cover page of the contract for printing. Will appear to all the users, primarily used by the County Manager.
- **[Cancel]:** Cancels the screen and returns to the home page.

Notes:

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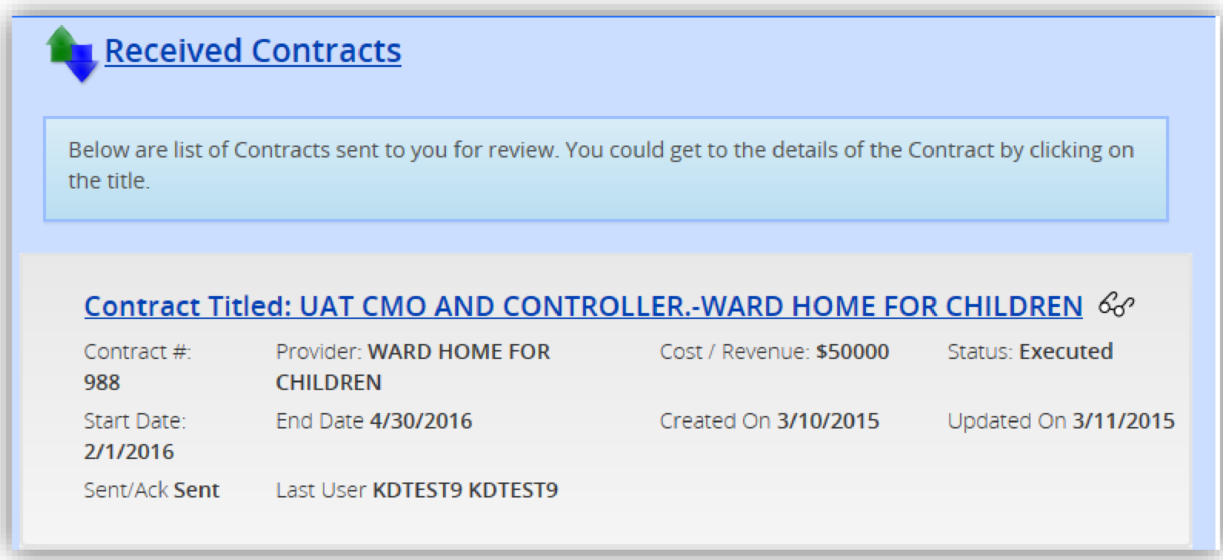
Received Contracts

- This screen will display a list of Contracts sent to you for review

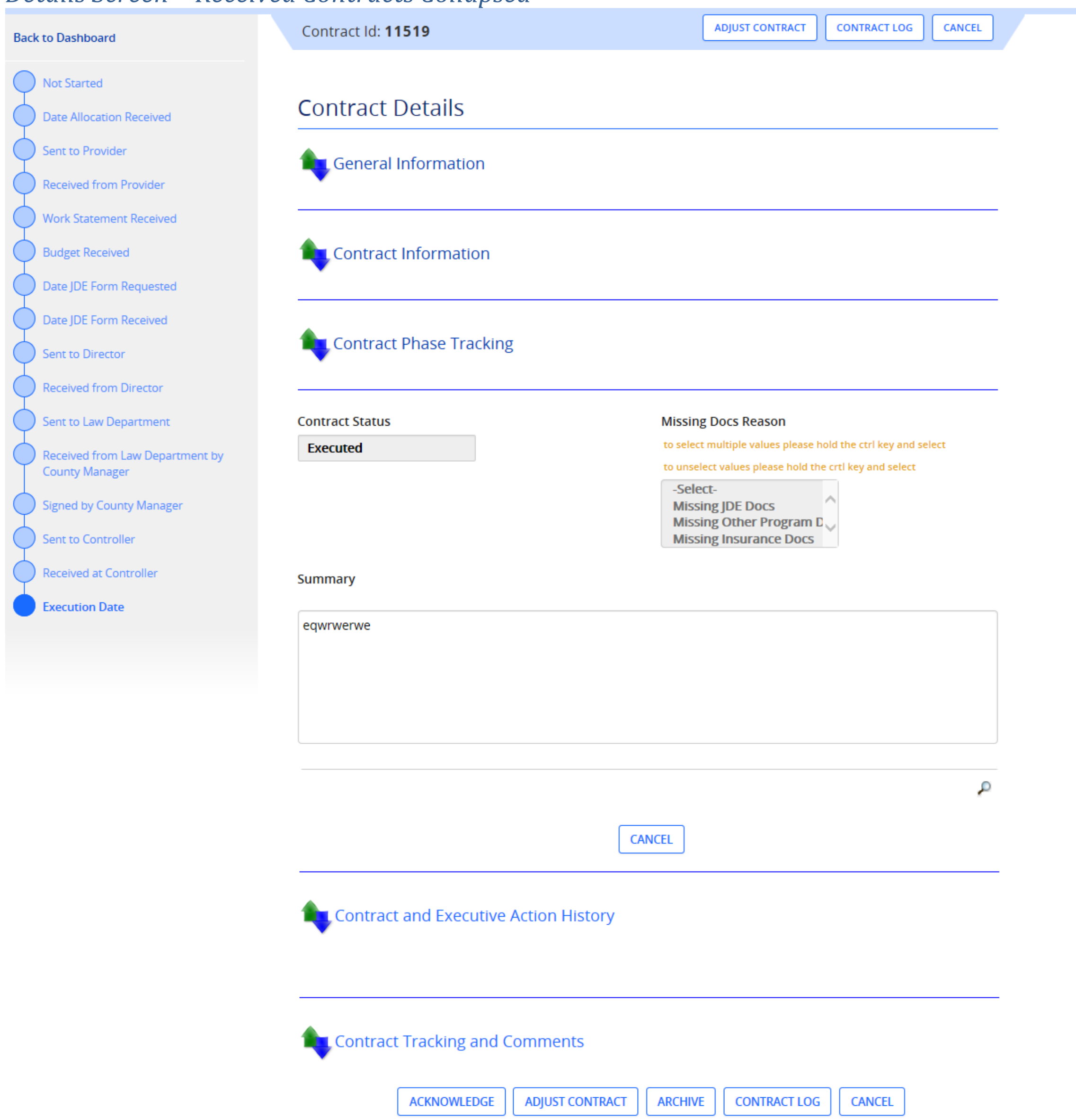


Title: Get to the details by clicking on the title or the [icon]

Prepopulated Fields:

1. **Contract #:** Displays the Contract number of the executed contract.
2. **Provider:** Displays the title of the provider associated with the contract.
3. **Cost/Revenue:** Displays cost or revenue of the contract.
4. **Status:** Displays the status of the contract.
5. **Start Date:** Displays the start date of the contract.
6. **End Date:** Displays the end date of the contract.
7. **Created On:** Displays the date the contract was created on.
8. **Updated On:** Displays the date the contract was updated on.
9. **Sent/Ack:** Displays state of the contract from the last user.
10. **Last User:** Displays the last user of the contract.

Details Screen – Received Contracts Collapsed



Progress Bar: The Progress or Tracking Bar allows you to monitor status

Details Screen – Received Contracts Collapsed cont'd

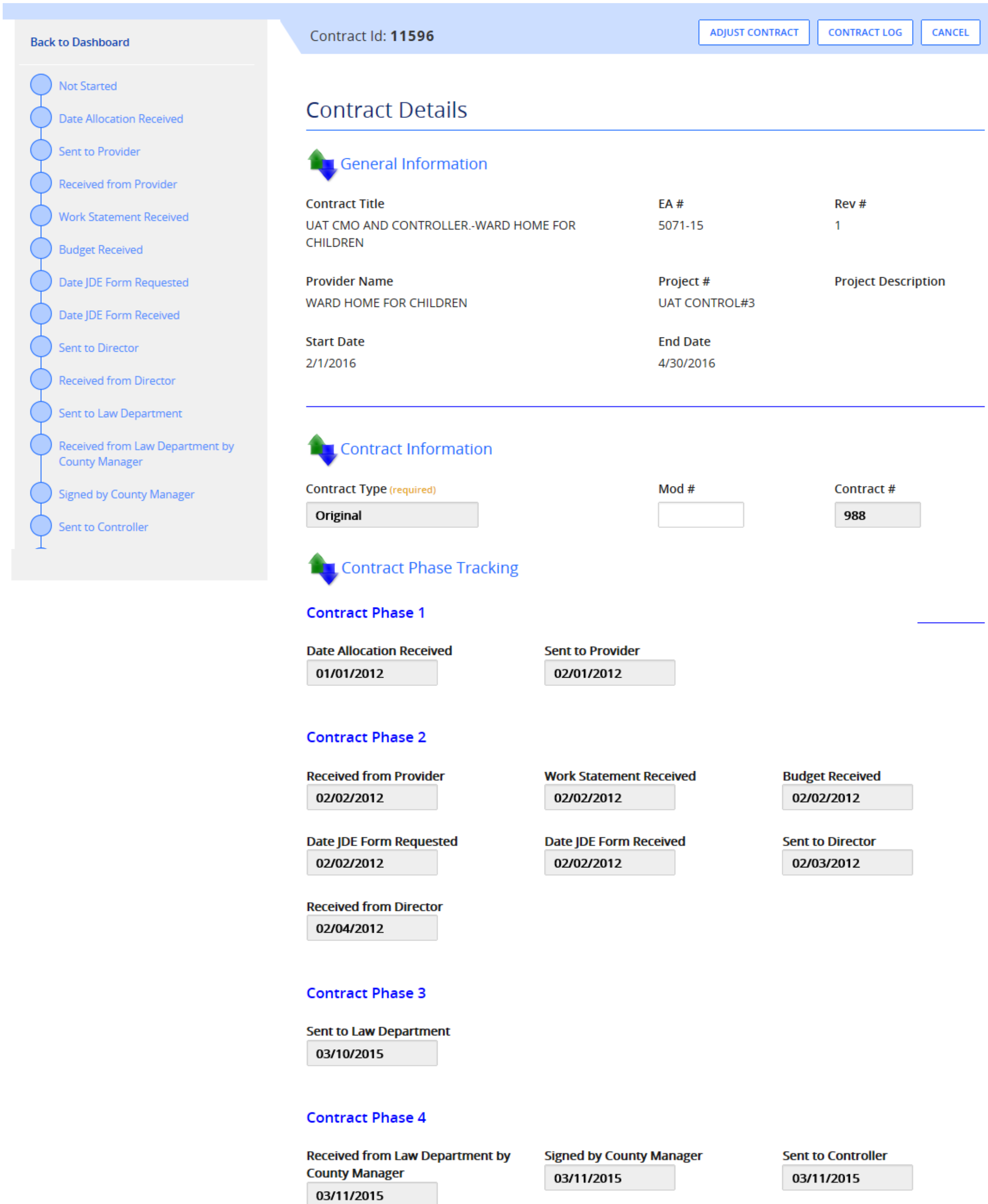
Detail Screen Titles:

1. General Information
2. Contract Information
3. Contract Phase Tracking
4. Contract and Execution Action History
5. Contract Tracking and Comments

Buttons:

- **[Acknowledge]:** Acknowledges the receipt of the contract. This is the first option to perform before any action.
- **[Adjust Contract]:** Takes the user to the adjust contract page, to adjust the dollar amount of the contract.
- **[Archive]:** Puts the contract in the archive status and takes it off of home page.
- **[Contract Log]:** Opens the cover page of the contract for printing. Will appear to all the users, primarily used by the County Manager.
- **[Cancel]:** Cancels the screen and returns to the home page.

Received Contracts Details Page Expanded



Received Contracts Details Page Expanded cont'd

Contract Phase 6

Execution Date

03/11/2015

Contract Status

Executed

Missing Docs Reason

to select multiple values please hold the ctrl key and select

to unselect values please hold the crtl key and select

-Select-
Missing JDE Docs
Missing Other Program D
Missing Insurance Docs

Summary

CANCEL

Contract and Executive Action History

Contract History

Seq #	Type	Rev #	Last User	Amount	Change	Update Date	
1	Original	0	KDTEST21 KDTEST21	$50,000.00	0	3/10/2015	Click here for Details

First Previous 1 Next Last

Executive Action for this Contract

EA Number	Date Created	Office	Title	Amount	Date Submitted	Status	
5071-15	3/10/2015	Human Service(s)	UAT CMO AND CONTROLLER.	$100,000.00	3/10/2015	Approved	Click here for Details

First Previous 1 Next Last

Contract Tracking and Comments

Contract Tracking
Comment Log

Responsible Party	Comments	Made By	Date	otes

First Previous Next Last

Responsible Party

-Select-

Send Email

Comments

ACKNOWLEDGE ADJUST CONTRACT ARCHIVE CONTRACT LOG CANCEL

Received Contracts Details Page Expanded cont'd

Prepopulated Fields:

General Information

1. **Contract Title**: Displays the title of the contract and the link to the actual contract.
2. **EA#:** Displays the EA number associated with the contract.
3. **Rev #:** If a revision has been made, the revision number associated with the contract will display.
4. **Provider Name:** Displays the title of the provider/grantor associated with the contract.
5. **Project #:** Displays project number associated with the contract.
6. **Project Description:** Displays project description associated with the contract.
7. **Start Date:** Displays the start date of the contract.
8. **End Date:** Displays the end date of the contract.

Contract Information:

1. **Contract Type:** Displays the type of the contract associated with the EA.
2. **Mod #:** Displays modification number that is associated with the contract.
3. **Contract Number:** Displays contract number that is associated with the contract and is completed by the Controller's office later in the process unless this is an amendment for which the creator had the original agreement number.
4. **Initial Allocation Amount:** Displays initial allocation that is associated with the contract.
5. **Current Allocation Amount:** Displays most current allocation that is associated with the contract.

Contract Phase Tracking

1. **Contract Phase – 1**: After this information is entered, Phase 2 fields will become active.
    a. **Date Allocation Received:** Displays the date allocation for contract was received.
    b. **Sent to Provider:** Displays the date contract was sent to provider.
2. **Contract Phase – 2:**
    a. **Received from Provider:** Displays date contract received from provider.
    b. **Work Statement Received:** Displays date Work Statement received.
    c. **Budget Received:** Displays the date budget was received.
    d. **JDE Form Requested:** Displays the date JDE form requested.
    e. **JDE Form Received:** Displays the date JDE form received.
    f. **Sent To Director:** Displays the date contract sent to Director.
    g. **Received From Director:** Displays the date contract received from Director.

Received Contracts Details Page Expanded cont'd

Contract and Executive Action History:

3. **Contract History:**
    a. **Seq #:** Displays sequence numbers in order based on the number of sequential changes to the contract (i.e. amendments, adjustments).
    b. **Type:** Displays contract type for the selected contract.
    c. **Rev #:** Displays revision numbers in sequential order based on number of revisions made to contract.
    d. **Last User:** Displays last user in Action Tracker for this contract.
    e. **Amount:** Displays the current amount of the contract.
    f. **Change:** Displays the change amount entered for the contract.
    g. **Update Date:** Date populates from the date that the change was created in Action Tracker.

4. **Executive Action for this Contract:**
    a. **EA#:** Displays EA number for selected EA.
    b. **Date Created:** Displays date created from selected EA.
    c. **Office:** Displays office associated with selected EA.
    d. **Title:** Displays title of selected EA.
    e. **Amount:** Displays amount associated with selected EA.
    f. **Date Submitted:** Displays date selected EA was submitted to the County Manager's Office.
    g. **Status:** Displays the most current status of the selected EA.

Contract Tracking and Comments: (Progress of contract will display in reverse chronological order.)

1. **From:** Displays the history of the contract, and who it was sent from.
2. **Department From:** Displays the history of the contract, and what department it was sent from.
3. **To:** Displays the history of the contract, and who it was sent to.
4. **Department To:** Displays the history of the contract, and what department it was sent to.
5. **Date:** Displays the history of the date and time the contract was created.
6. **Changed by:** Displays the person who changed the contract.
7. **Status:** Displays the history of the latest status of the contract.
8. **State:** Displays the history of the latest state of the contract.
9. **Notes:** Displays the history of the notes regarding the contract.

Contracts – Executed Details Screen Expanded cont'd

Comment Log:

1. **Responsible Party:** Displays the party responsible for the action identified in the comment.
2. **Comments:** Displays the text entered by a user as a comment regarding the contract.

***Best Business Practice says**, "Comments are entered by users to help viewers understand why delays may have or are occurring. For example a DHS Contracts user may comment the responsible party is the Provider and make a comment that the insurance is not yet received and provider was notified."*

Buttons:

- **[Acknowledge]:** Acknowledges the receipt of the contract. This is the first option to perform before any action.
- **[Adjust Contract]:** Takes the user to the adjust contract page, to adjust the dollar amount of the contract.
- **[Archive]:** Puts the contract in the archive status and takes it off of home page.
- **[Contract Log]:** Opens the cover page of the contract for printing. Will appear to all the users, primarily used by the County Manager.
- **[Cancel]:** Cancels the screen and returns to the home page.

Notes:

Exercise 1

Exercise 1:

Handout

Exercise 1

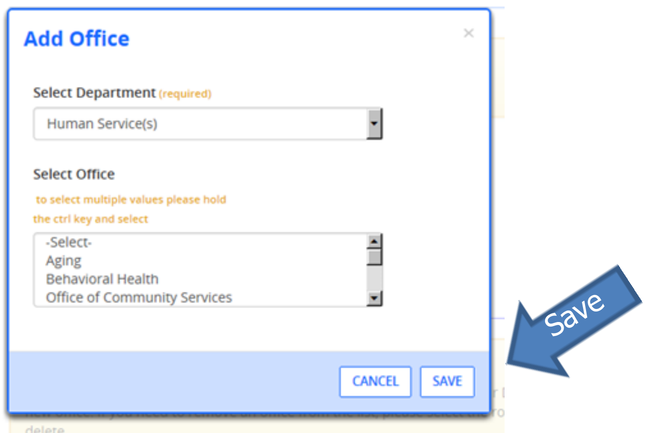
Section 3: Create Grants and Executive Actions

Create Grant

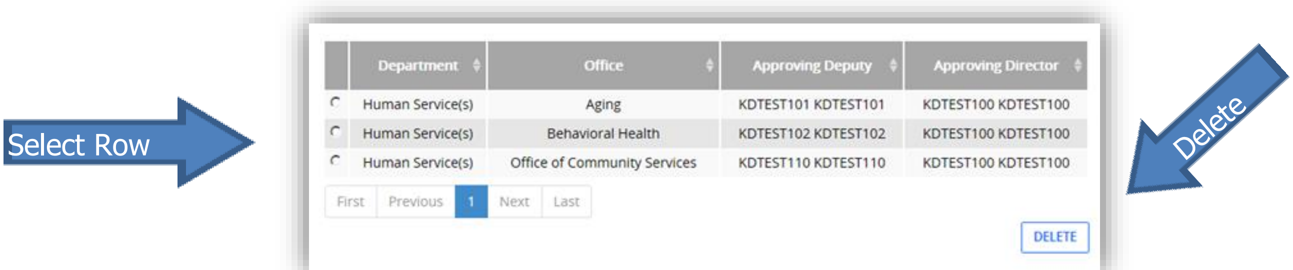
From "MY Dashboard"

Grant > Create

1. **Enter New Grant**
2. **Add Office:** Click on + to add a new office. The following screen will display:



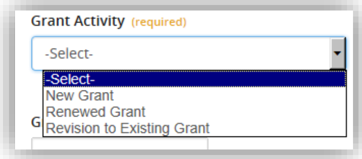
   a. **Select Department:** Prepopulated with user's department.
   b. **Select Office:** To select multiple offices, hold the ctrl key and select offices.
   c. Click **Save** and the following screen will display:



   d. To remove an office, select the row and click on delete

Create Grant cont'd

3. **Grant Activity:** Select grant activity from dropdown box.



  - New Grant
  - Renewed Grant
  - Revision to Existing Grant

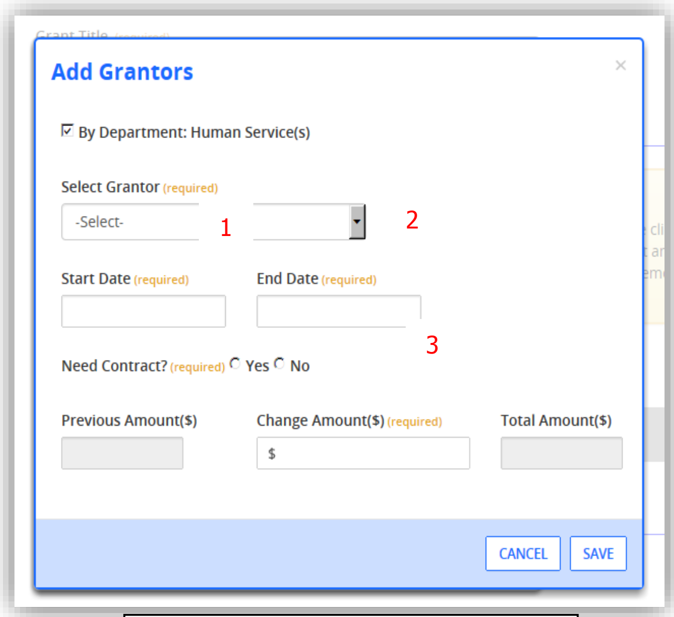
4. **Grant#:** If given by Grantor, enter Grant number.

5. **Grant Title:** Choose unique Grant Title

Best Business Practice: - Suggest that the Grant Title relate to the funding source's application process for example DHS may be applying to the United Way for the annual tax assistance program. The user may want to include the year in the title if they believe the grant will be renewed annually. Our title in this example would be UW 2015 Tax Assistance Program

Create Grant cont'd

6. **Add Grantors:** Click on + to add grantors. The following screen will display:



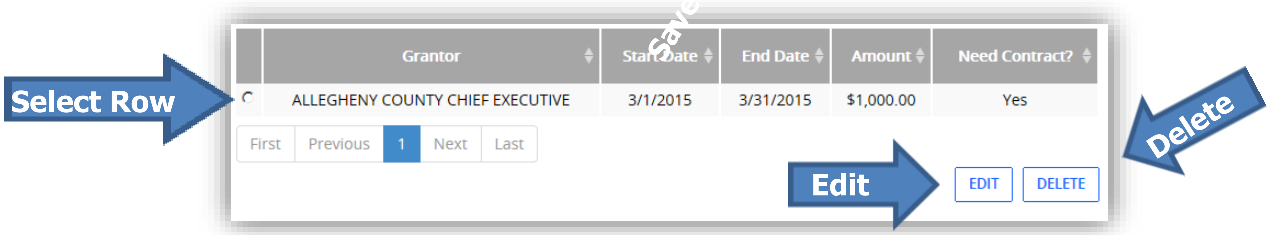
By Department: Prepopulated

- ✓ If box is selected, grantors which have been used previously will display.
- ✓ Uncheck box to display all grantors.
- ✓ Select grantor from dropdown box.
- ✓ Enter the following information:
    1. **Start Date:** Type in the date [mm/dd/yyyy] or chose the calendar.
    2. **End Date:** Type in the date [mm/dd/yyyy] or chose the calendar.
- ✓ **Need Contract?** Yes or No must be selected.
- ✓ **Amount:**
    1. **Change Amount($):** Enter amount (not exceed amount of contract)

Best Business Practice *says, "Need contract "yes" will be required at grant creation in order to have a contract tracking record available after the EA is approved. The County Manager has adopted the practice of not signing documents which have no Action Tracker contract record to record progress."*

Create Grant cont'd

a. Click **Save** and grantors will display as follows:



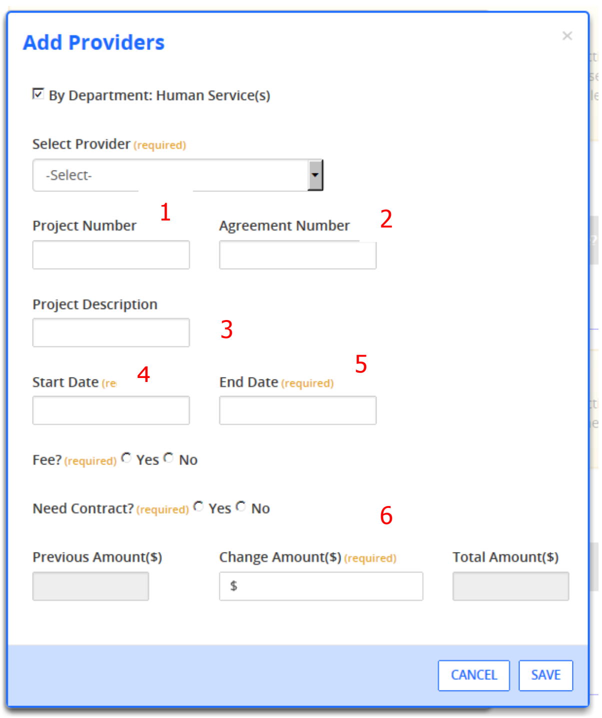
b. To remove a grantor, select the row and click on **Delete**.

c. To edit a Grantor, select the row and click on **Edit**.

7. **Add Grantor Requirements: (Based on business requirements)**
   - ❖ **Please Select all that apply:** Check each values that applies
     - ☐ Funds must be deposited in a separate account
     - ☐ Funds must be deposited in interest bearing account
     - ☐ Must drawdown funds within 3 days of deposit
     - ☐ Interest earned must be returned to the grantor
     - ☐ Other

     Please Specify: Enter text information in box

8. Click on [+] to add a new a new Provider (s). The following screen will display:



Create Grant cor

✓ **By Department**: Prepopulated
- If box is selected, providers which have been used previously will display.
- Uncheck box to display all providers.

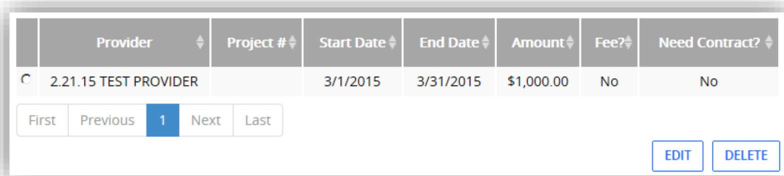
✓ Select provider from dropdown box.
✓ Enter the following information:

1. **Project Number**
2. **Agreement Number:** If this is a new grant, leave blank. It will be filled out by the Controller later in the process.
3. **Project Description**
4. **Start Date:** Type in the date [mm/dd/yyyy] or choose the calendar
5. **End Date:** Type in the date [mm/dd/yyyy] or choose the calendar

✓**Fee?** Yes or No must be selected.
✓**Need Contract?** Yes or No must be selected.
✓**Amount:**

6. **Change Amount($):** Enter amount (not exceed amount of contract)

✓Click **Save** and providers will display as follows:



9. Based on the grantor information, in the boxes displayed enter the following information: (based on earliest grantor and latest grantor dates)

1. **Start Date:** Type in the date [mm/dd/yyyy] or choose the calendar (Earliest start date of all Providers selected)
2. **End Date:** Type in the date [mm/dd/yyyy] or choose the calendar(latest end date of all Providers selected)

10. **Explanation/Description:** spell check & up to 4000 characters
Notes: spell check & upto 4000 characters

Create Grant cont'd

11. Click **Save** and Grant Details page will display

See page 13 for “Grant Details Screen” explanation

To create Executive Action, scroll to bottom of “Grant Details Screen” and click on the “Create Executive Action” button.

See page 65 Step 1 to create Executive Action.

Notes:

Section 4: Create Executive Actions and Contracts

Create Executive Action

The Executive Action (EA) is the core of Action Tracker. Records from the Grant Module and Contract Module tie to executive actions. Grant records are created and then attached to an Executive Action. Once an action is submitted to the County Manager's office a Contract record can then be generated from the Executive Action based on the providers/grantors listed in the action. This contract record is used to track the location of the actual contract documents.

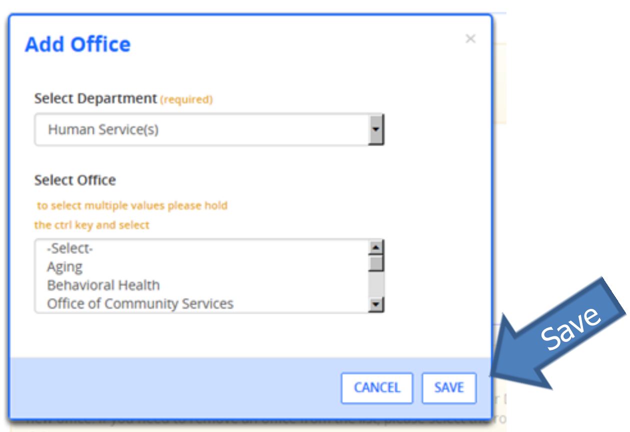
From "MY Dashboard"

Executive Action>Create

1. **Executive Action Title:** Type in unique name

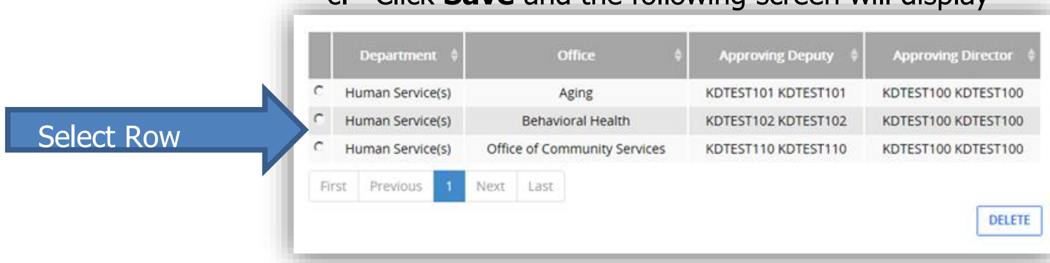
   Best Business Practice *says, "Every EA must have a unique title in order to keep the database from overwriting a prior EA. If the title is not unique, the software will give you an error message. Some helpful ideas to keep the title unique is to add the year or time period; your initials or department; an acronym, or an RFP number, etc."*
2. **Executive Action Type:** Select from dropdown menu.
3. **Add Office:** Click on + to add a new office. The following screen will display:



   a. **Select Department:** Prepopulated; if grant is associated will pull from grant record.

Create Executive Action cont'd

b. **Select Office:** To select multiple offices, hold the ctrl key and select offices.
c. Click **Save** and the following screen will display

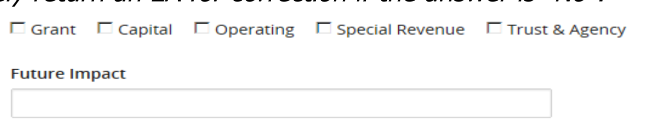


	Department	Office	Approving Deputy	Approving Director
○	Human Service(s)	Aging	KDTEST101 KDTEST101	KDTEST100 KDTEST100
○	Human Service(s)	Behavioral Health	KDTEST102 KDTEST102	KDTEST100 KDTEST100
○	Human Service(s)	Office of Community Services	KDTEST110 KDTEST110	KDTEST100 KDTEST100

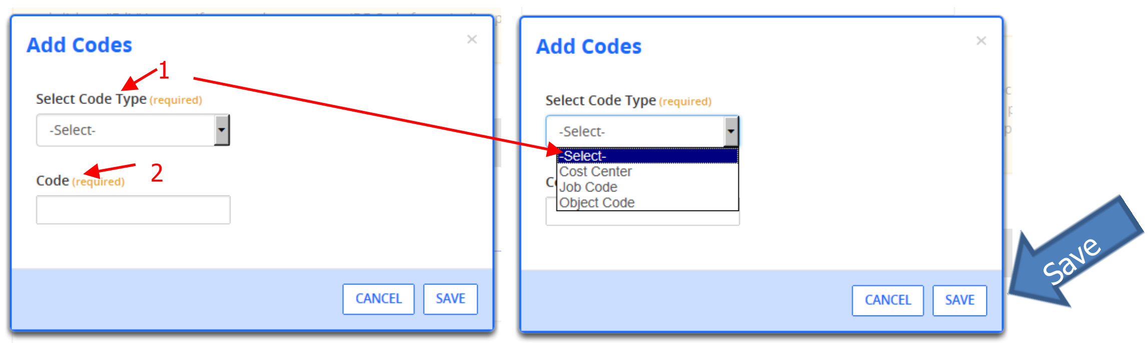
✓ To remove an office, select the row and click on delete

4. **Contact Person:** Dropdown box displays list of contacts for your department.
5. **Is this Executive Action included in Budget?**

Best Business Practice says, *'The answers should be "Yes"; the County Manager's staff will likely return an EA for correction if the answer is "No"."*



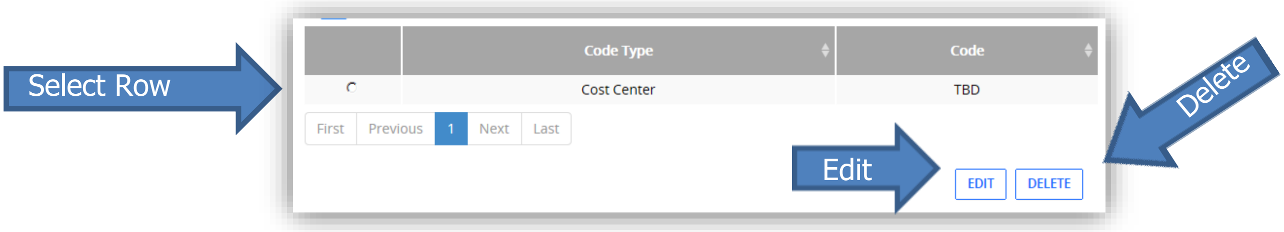
6. **Future Impact** (Optional): Information entered in this box is based on individual department decision.
7. **Add JDE Code(s):** Click on + to add a new JDE Code. The following screen will display:



a. Select JDE type from dropdown box
   1. Code types.
      a. Cost Center
      b. Job Code
      c. Object Code
   2. Type corresponding JDE code in **Code box**

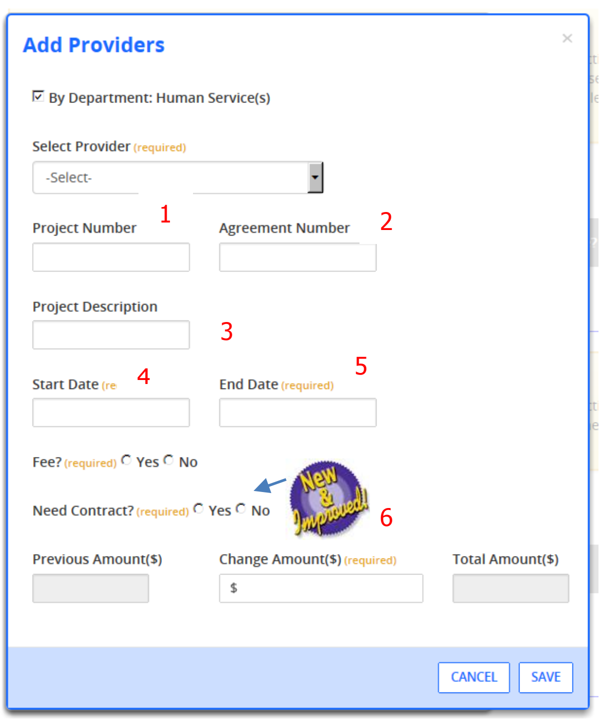
Create Executive Action cont'd

b. Almost all Actions have two (2) of the three (3) code types
c. Click **Save** and Code Types will display as follows:



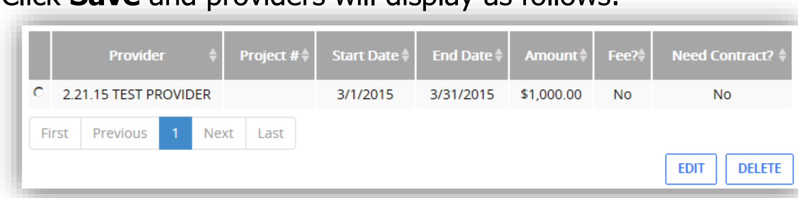
Create Executive Action cont'd

8. To edit a JDE Code, select the row and click **Edit**.
9. To delete a JDE Code, select the row and click **Delete**.
10. **Summary:** Type in text; spell check & up to 4000 characters
11. **Explanation:**
    a. If associated with grant will prepopulate.
    b. Type in text; spell check & up to 4000 characters
12. **Grantor Information:** Will prepopulate if associated with a grant.
    (ALL STEPS FROM 3, 12, 13, 14 AND 16 WILL PREPOPULATE IF ASSOCIATED WITH A GRANT)
13. **Provider Information:** Click on + to add a new provider (s). The following screen will display: (If EA is from grant, providers cannot be added.)



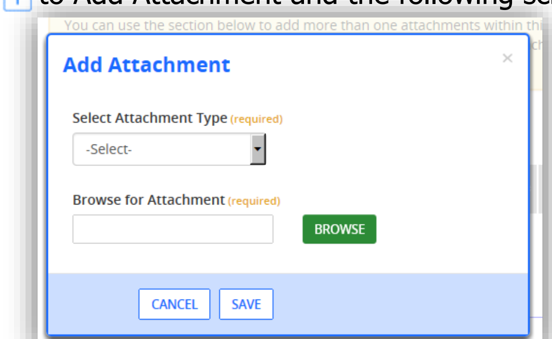
Create Executive Action cont'd

- ✓ **By Department**: Prepopulated
  - If box is selected, providers which have been used previously, will display.
  - Uncheck box to display all providers.
- ✓ Select Provider from dropdown box.
- ✓ Enter the following information:
  1. **Project Number**
  2. **Agreement Number**
  3. **Project Description**
  4. **Start Date:** Type in the date [mm/dd/yyyy] or chose the calendar
  5. **End Date:** Type in the date [mm/dd/yyyy] or chose the calendar
- ✓ **Fee?** Yes or No must be selected.
- ✓ **Need Contract?** Yes or No must be selected.
- ✓ **Amount:**
  6. **Change Amount($):** Enter amount (not exceed amount of contract)
- ✓ Click **Save** and providers will display as follows:



	Provider	Project #	Start Date	End Date	Amount	Fee?	Need Contract?
○	2.21.15 TEST PROVIDER		3/1/2015	3/31/2015	$1,000.00	No	No

14. Click on [+] to Add Attachment and the following screen will display.



1. **Select Attachment Type** from dropdown box: (Repeat for multiple attachments)
   1. Generic
   2. Grantor Name
   3. Provider Name

Create Executive Action cont'd

2. **Browse for Attachment:** Click in the box to choose file to upload.
3. Click **Save**.

Financial Information:

1. **Estimated Cost:** Sum of Provider Field; will prepopulated if associated with grant. If not associated with grant, user must be entered by user.
2. **Estimated Revenue:** Sum of Grantors; will prepopulate if associated with grant. If not associated with grant, user must be entered by user.
3. **County Match:** Enter amount.
4. Click **Save** the "Executive Action Details Screen" will display.
5. Scroll to bottom of screen, Click **Send to Deputy Director.**

"Executive Action Details Screen" will display.

See page 31 for "Executive Action Details Screen" explanation

Notes:

Create a Contract

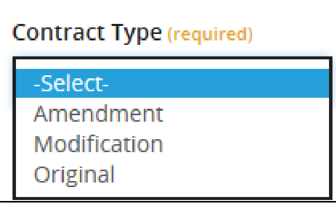
The purpose of the contract record is to track the location of the actual contract. Once the contract is completed, a Contract Log is created and is used as a cover sheet, for the contract, by the County Manager's Office.

After an Executive Action has been submitted or a Grant has been created, a contract record can be created from the action if the "Need Contract" radio button was flagged "Yes". If there are no providers or grantors listed in the "Providers Table" or "Grantors Table" within the action, no contract record can be created.

To create a contract:

From "MY Dashboard"> My Executive Actions - Submitted/Approved

1. Click on the EA title to display the details.
   a. Once the action has the status of submitted, the **Create Contract** button displays at the bottom of the page.
2. Scroll to bottom of screen and click on the **Create Contract** button; the EA Details page will display and the **Create Contract** button will no longer appear on the " My Executive Actions - Submitted/Approved" page.
3. If "Yes" was checked for, Need Contract, for either the Grantor or Provider, a link will be available allowing you to create a contract. <u>Do the following</u>:
   a. Expand the title "Grant Information" to display > Grantors within the Executive Action >click here to access the Contract record.
      - The Contract Details Screen will display.
   b. Expand the title "Provider Information" to display > Providers within the Executive Action >click here to access the Contract record.
      - The Contract Details Screen will display.
4. **General Information:** This section will be prepopulated with information from the action.
5. **Contract Type:** Select contract type from dropdown box.

Grantor / Provider: varies by County Department


Create a Contract cont'd

6. **Contract #:** Recorded by JDEdwards system and populated by County Controllers Office.
7. **Mod#:** Optional use based on internal business process.
8. Scroll to bottom of the screen and click **Save** to begin Contract Phase Tracking process.

Contract Phase Tracking

Once the Contract Type has been selected, **Phase 1** becomes enabled (step 5 above).

This is a 6 phase process which begins with the date of allocation and ends with the execution date. Each phase must be complete before the next phase can begin.

1. **Phase 1** begins the process by selecting the contract status from the dropdown bar.
2. Once status is selected, click **Save; Phase 1** will become active for data entry.
3. Enter appropriate information into data boxes, click **Save, Phase 2** will become active for processing and the **Contract Status** defaults to "New".
   a. The creator should NOT selected executed from the statuses - this is only for the Controller's use.
4. Once each of the **Phase 2** dates are completed for the contract, click Save **Phase 3** opens and the **Send to Law Department** button becomes available. Clicking send to Law Department will auto fill the sent to Law Department field. This completes **Phase 3** and then **Phase 4** becomes visible.
5. Once **Phase 3** is complete; the creator must wait to receive a response from the Law Department before completing **Phase 4 thru 5**. See following page for screenshots of information for Phases 3 thru 5.
6. **Phase 6** ends the process; box is prepopulated with the Execution Date.

Notes:

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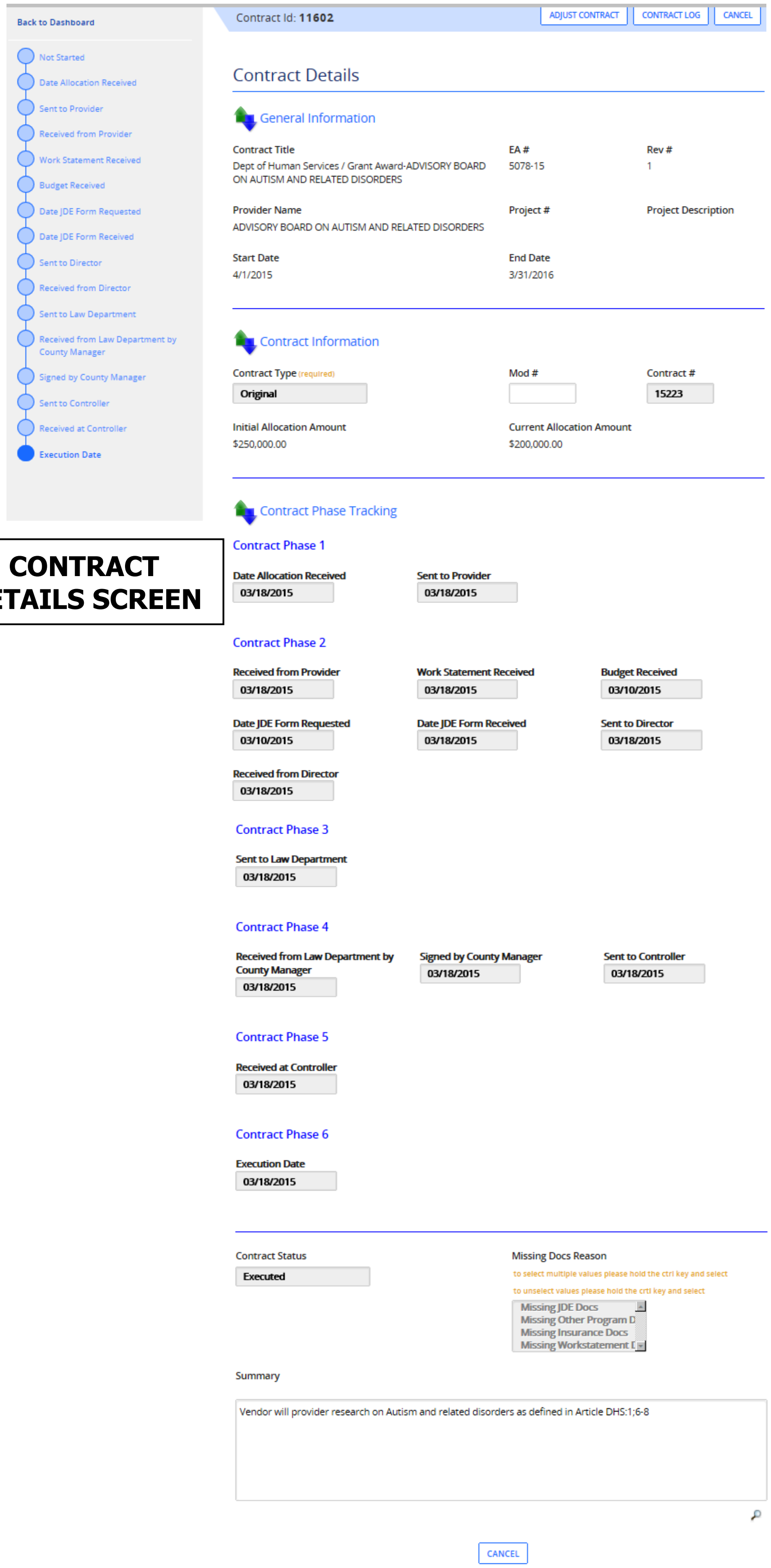
Create a Contract cont'd



CONTRACT DETAILS SCREEN

Create a Contract cont'd

CONTRACT DETAILS SCREEN Cont'd

Contract and Executive Action History

Contract History

Seq #	Type	Rev #	Last User	Amount	Change	Update Date	
1	Original	0	KDTEST21 KDTEST21	$250,000.00	0	3/18/2015	Click here for Details
2	Adjustment	0	KDTEST21 KDTEST21	$200,000.00	-50000	3/18/2015	Click here for Details

First Previous 1 Next Last

Executive Action for this Contract

EA Number	Date Created	Office	Title	Amount	Date Submitted	Status	
5078-15	3/18/2015	Human Service(s) - Multiple Offices	Dept of Human Services / Grant Award	$1,000,000.00	3/18/2015	Approved	Click here for Details

First Previous 1 Next Last

Contract Tracking and Comments

Contract Tracking

From	Department From	To	Department To	Date	Changed By	Status	State	Notes
KDTEST9 KDTEST9	Controller's Office	KDTEST9 KDTEST9	Controller's Office	3/18/2015 11:10:06 AM	KDTEST9	Active	Updated	
KDTEST9 KDTEST9	Controller's Office	KDTEST21 KDTEST21	Human Service(s)	3/18/2015 11:10:06 AM	KDTEST9	Executed	Sent	
KDTEST9 KDTEST9	Controller's Office	KDTEST9 KDTEST9	Controller's Office	3/18/2015 11:03:35 AM	KDTEST9	Active	Updated	
KDTEST9 KDTEST9	Controller's Office	KDTEST9 KDTEST9	Controller's Office	3/18/2015 11:03:25 AM	KDTEST9	Active	Acknowledge	
KDTEST51 KDTEST51	County Manager's Office	Controller Group		3/18/2015 10:53:16 AM	KDTEST9	Active	Sent	
KDTEST51 KDTEST51	County Manager's Office	KDTEST51 KDTEST51	County Manager's Office	3/18/2015 10:53:11 AM	KDTEST51	Active	Updated	
KDTEST51 KDTEST51	County Manager's Office	KDTEST51 KDTEST51	County Manager's Office	3/18/2015 10:52:48 AM	KDTEST51	Active	Acknowledge	
KDTEST26 KDTEST26	Law Department	County Manager		3/18/2015 10:49:18 AM	KDTEST51	Active	Sent	
KDTEST26 KDTEST26	Law Department	KDTEST26 KDTEST26	Law Department	3/18/2015 10:49:11 AM	KDTEST26	Active	Acknowledge	
KDTEST21 KDTEST21	Human Service(s)	Law		3/18/2015 10:31:44 AM	KDTEST26	Active	Sent	

First Previous 1 2 Next Last

Comment Log

Responsible Party	Comments	Made By	Date

First Previous Next Last

Responsible Party

-Select-

Send Email ☐

Comments

ACKNOWLEDGE ADJUST CONTRACT ARCHIVE CONTRACT LOG CANCEL

Exercise 2

Exercise 2

Handout

Exercise 2

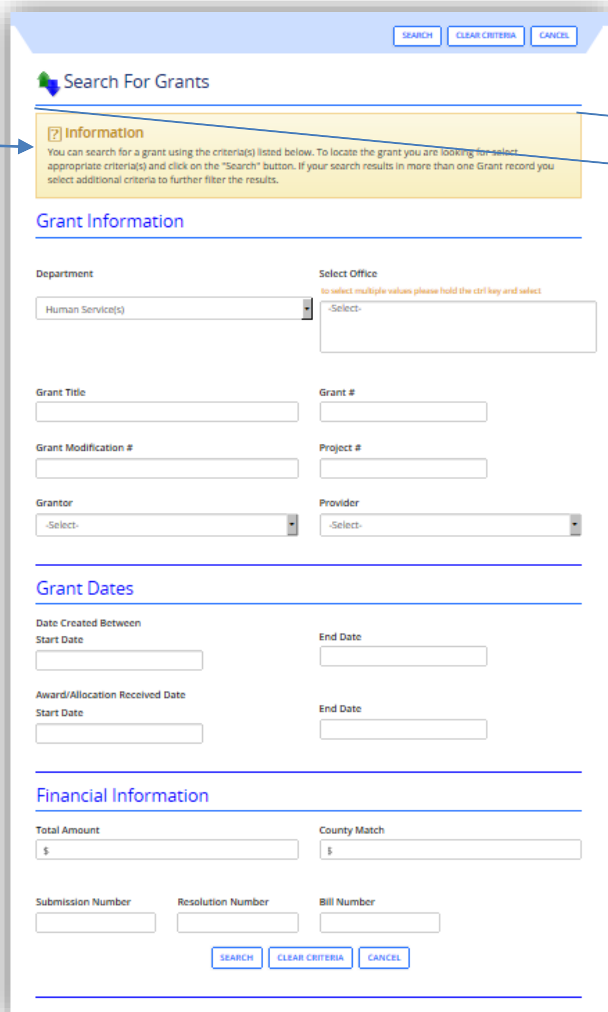
Section 5: Search, Copy, and Modify Functions

Search for Grants

This screen is used to search for an existing Grant by entering various criteria that may be known.

From "MY Dashboard"

Grant->Search



Information

You can search for a grant using the criteria(s) listed below.

To locate the grant you are looking for select appropriate criteria(s) and click on the "Search" button.

If your search results in more than one Grant record you select additional criteria to further filter the results.

Buttons: (top/bottom screen)

[Search]
[Clear Criteria]
[Cancel]

<u>Grant Search Criteria</u>
Department
Select Office
Grant Title

To conduct a search:

- Enter information into one or more fields or leave all fields blank
- Click the **Search** button.
  - ✓ Your search may result in this message "Your Search Criteria returns more than 60 rows, please add additional search criteria to narrow your search results."

Search for Grants cont'd

Grant Information

1. **Department:** Defaults on users department. Department must be selected, prior to any other search criteria. The department is the only field that must be filled in prior to any other search criteria. Some users will be able to select other departments, however only one department at a time.
2. **Select Office:** To select multiple offices, hold the **Ctrl key** and select.
3. **Grant Title:** Enter the first letter or first several letters of the grant title. This will produce exact and partial matches meaning that all results will contain the letter or combination of letters that you entered.
4. **Grant #:** Enter the number or amount or leave blank.
5. **Grant Modification #:** Enter the number or amount or leave blank.
6. **Project #:** Enter the number or leave blank.
7. **Grantor:** Select the grantor name in the drop-down list or leave blank.
8. **Provider:** Select the provider name in the drop-down list or leave blank.

Grant Dates

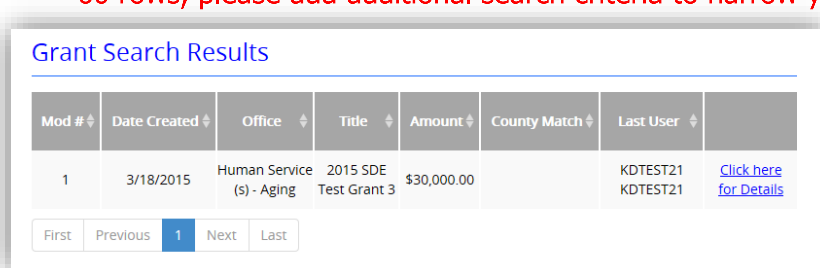
1. **Date Created Between; Start Date/End Date:** In designated box, enter the date range or leave blank.
2. **Award Allocation Received Date: Start Date/End Date:** In designated box, enter the date range or leave blank.

Financial Information

1. **Total Amount:** Enter the amount or leave blank.
2. **County Match:** Enter the amount or leave blank.
3. **Submission Number:** Enter the number or leave blank.
4. **Resolution Number:** Enter the number or leave blank.
5. **Bill Number:** Enter the number or leave blank.

To conduct a search:

1. Enter information into one or more fields or leave all fields blank
2. Click the **Search** button to display the following screen:
   - ✓ Your search may result in this message "Your Search Criteria returns more than 60 rows, please add additional search criteria to narrow your search results."



Grant Search Results

Mod #	Date Created	Office	Title	Amount	County Match	Last User	
1	3/18/2015	Human Service (s) - Aging	2015 SDE Test Grant 3	$30,000.00		KDTEST21 KDTEST21	Click here for Details

First Previous 1 Next Last

Search for Grants cont'd

Grant Search Results: This Grid appears after the user enters criteria, and hits the search button. If results are not returned based on the criteria entered, the screen will display a message with instructions to "…re-define your search criteria".

1. **Mod #:** Displays the modification number, if grant has had modifications.
2. **Date Created:** Displays the date grant was created.
3. **Office:** Displays selected office.
4. **Title:** Displays the title name of the grant.
5. **Amount:** Displays the amount of the grant.
6. **County Match:** Displays county match associated with the grant.
7. **Last User:** Displays the last user for this grant.
8. **Click Here for Details:** Displays "Grant Details Screen".

Notes:

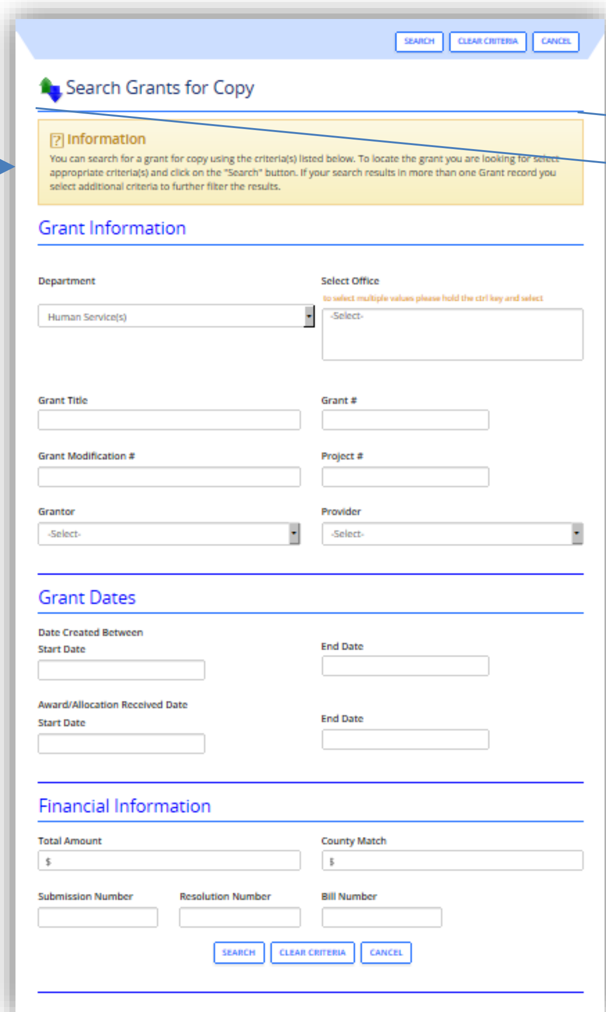
Search Grants for Copy

This screen is used to search existing grants to copy. Grants can be searched by various criteria.

Best Business Practice: This functionality is useful for grants that are renewed on an annual or semi-annual basis

From "MY Dashboard"

Grant->Copy



Information

You can search for a grant for copy using the criteria(s) listed below.

To locate the grant you are looking for select appropriate criteria(s) and click on the "Search" button.

If your search results in more than one Grant record you select additional criteria to further filter the results.

Buttons: (top/bottom screen)

[Search]
[Clear Criteria]
[Cancel]

Grant Search Criteria
Department
Select Office
Grant Title

To conduct a search:

- Enter information into one or more fields or leave all fields blank
- Click the **Search** button.
  - ✓ Your search may result in this message "Your Search Criteria returns more than 60 rows, please add additional search criteria to narrow your search results."

Search Grants for Copy cont'd

Grant Information

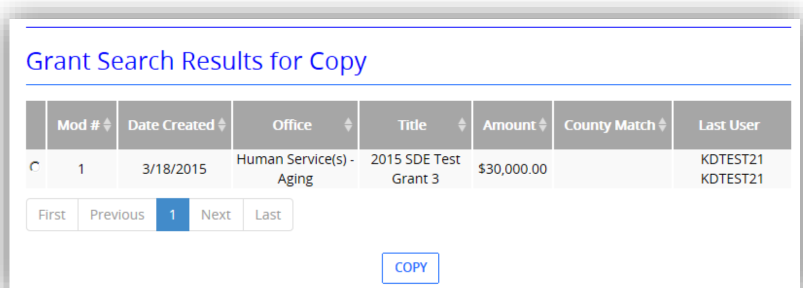
1. **Department:** Defaults on users department. Department must be selected, prior to any other search criteria. <u>The department is the only field that must be filled in</u> prior to any other search criteria. Some users will be able to select other departments, however only one department at a time.
2. **Select Office:** To select multiple offices, hold the **Ctrl key** and select.
3. **Grant Title:** Enter the first letter or first several letters of the grant title. This will produce exact and partial matches meaning that all results will contain the letter or combination of letters that you entered.
4. **Grant #:** Enter the number or amount or leave blank.
5. **Grant Modification #:** Enter the number or amount or leave blank.
6. **Project #:** Enter the number or leave blank.
7. **Grantor:** Select the grantor name in the drop-down list or leave blank.
8. **Provider:** Select the provider name in the drop-down list or leave blank.

Grant Dates

1. **Date Created Between; Start Date/End Date:** In designated box, enter the date range or leave blank.
2. **Award Allocation Received Date: Start Date/End Date:** In designated box, enter the date range or leave blank.

Financial Information

1. **Total Amount:** Enter the amount or leave blank.
2. **County Match:** Enter the amount or leave blank.
3. **Submission Number:** Enter the number or leave blank.
4. **Resolution Number:** Enter the number or leave blank.
5. **Bill Number:** Enter the number or leave blank.
6. Click **Search** to display the following screen:



Search Grants for Copy cont'd

Grant Search Results for Copy: The screen appears after the user enters criteria, and hits the search button. If results are not returned based on the criteria entered the screen will display a message with instructions to "…re-define your search criteria".

1. **Mod #:** Displays the modification number, if grant has had modifications.
2. **Date Created:** Displays the date grant was created.
3. **Office:** Displays selected office.
4. **Title:** Displays the title name of the grant.
5. **Amount:** Displays the amount of the grant.
6. **County Match:** Displays county match associated with the grant,
7. **Last User:** Displays the last user for this grant.

Buttons:
[Copy]

To Copy Grant

1. Identify grant to copy by selecting row.
2. Click **Copy** to display the "Enter New Grant Screen".
3. A unique name must be entered for the grant copy.
4. Click **Save**.
5. A new "Executive Actions Detail Screen" will display for this copy.

Notes:

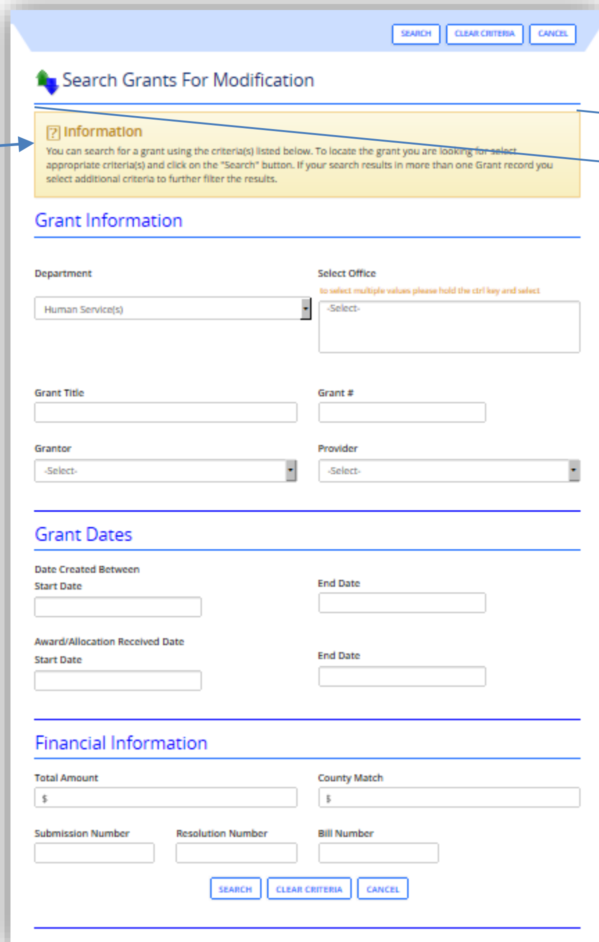
Search for Modifiable Grants

This screen is used for searching, if a user wants to find and modify an existing Grant. Grants can be searched by various criteria.

***Best Business Practice** says, "This functionality is used when a new grantor joins a project, when a new provider is identified for a project, or if the dates have changed."*

From "MY Dashboard"

Grant->Modify



Information
You can search for a grant using the criteria(s) listed below.

To locate the grant you are looking for select appropriate criteria(s) and click on the "Search" button.

If your search results in more than one Grant record you select additional criteria to further filter the results.

Buttons: (top/bottom screen)
[Search]
[Clear Criteria]
[Cancel]

<u>Grant Search Criteria</u>
Department
Select Office
Grant Title
Grant#
Grantor

To conduct a search:

- Enter information into one or more fields or leave all fields blank
- Click the **Search** button.
  - ✓ Your search may result in this message "Your Search Criteria returns more than 60 rows, please add additional search criteria to narrow your search results."

Search for Modifiable Grants cont'd

Grant Information

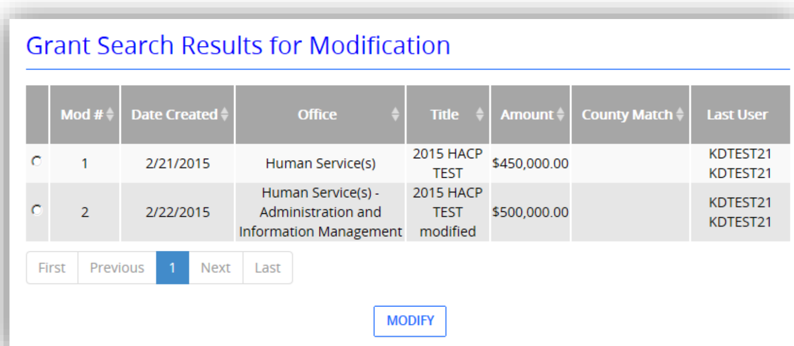
1. **Department:** Defaults on users department. Department must be selected, prior to any other search criteria. <u>The department is the only field that must be filled in</u> prior to any other search criteria. Some users will be able to select other departments, however only one department at a time.
2. **Select Office:** To select multiple offices, hold the **Ctrl key** and select.
3. **Grant Title:** Enter the first letter or first several letters of the grant title. This will produce exact and partial matches meaning that all results will contain the letter or combination of letters that you entered.
4. **Grant #:** Enter the number or amount or leave blank.
5. **Grant Modification #:** Enter the number or amount or leave blank.
6. **Project #:** Enter the number or leave blank.
7. **Grantor:** Select the grantor name in the drop-down list or leave blank.
8. **Provider:** Select the provider name in the drop-down list or leave blank.

Grant Dates

1. **Date Created Between; Start Date/End Date:** In designated box, enter the date range or leave blank.
2. **Award Allocation Received Date: Start Date/End Date:** In designated box, enter the date range or leave blank.

Financial Information

1. **Total Amount:** Enter the amount or leave blank.
2. **County Match:** Enter the amount or leave blank.
3. **Submission Number:** Enter the number or leave blank.
4. **Resolution Number:** Enter the number or leave blank.
5. **Bill Number:** Enter the number or leave blank.
6. Click **Search** to display the following screen:


Grant Search Results for Modification

	Mod #	Date Created	Office	Title	Amount	County Match	Last User
	1	2/21/2015	Human Service(s)	2015 HACP TEST	$450,000.00		KDTEST21 KDTEST21
	2	2/22/2015	Human Service(s) - Administration and Information Management	2015 HACP TEST modified	$500,000.00		KDTEST21 KDTEST21

First Previous 1 Next Last

MODIFY

Search for Modifiable Grants cont'd

Grant Search Results for Modification: The screen appears after the user enters criteria, and hits the search button. If results are not returned based on the criteria entered the screen will display a message with instructions to "…re-define your search criteria".

1. **Mod #:** Displays the modification number, if grant has had modifications.
2. **Date Created:** Displays the date grant was created.
3. **Office:** Displays selected office.
4. **Title:** Displays the title name of the grant.
5. **Amount:** Displays the amount of the grant.
6. **County Match:** Displays county match associated with the grant.
7. **Last User:** Displays the last user for this grant.

Buttons:

[Modify]

To Modify Grant

1. Identify grant to modify by selecting row.
2. Click **Modify** to display the "Enter New Grant Screen".
3. **Grant Activity:** Select revision to Existing Grant from dropdown box.
4. Make necessary modifications.
5. **Grant Title:** A unique name must be entered for the grant modification.
6. Click **Save**.

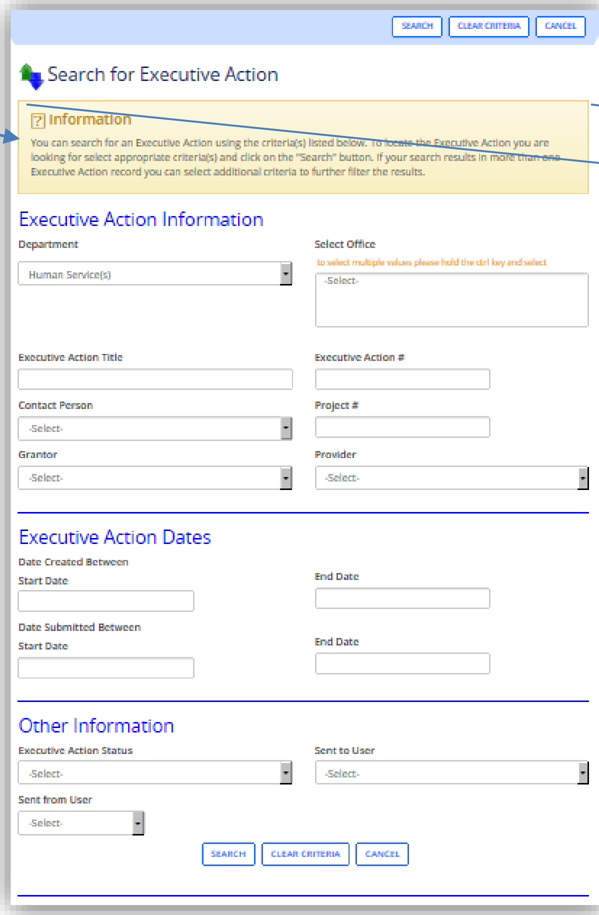
Notes:

Search for Executive Action

This screen is used for searching, if a user wants to find an existing EA. EA's can be searched by various criteria fields on the screen.

From "MY Dashboard"

Executive Action->Search



Information

You can search for an Executive Action using the criteria(s) listed below.

To locate the Executive Action you are looking for select appropriate criteria(s) and click on the "Search" button.

If your search results in more than one Executive Action record you can select additional criteria to further filter the results.

Buttons: (top/bottom screen)

[Search]
[Clear Criteria]
[Cancel]

Executive Action Search Criteria

Department
Select Office
Executive Action Title
Executive Action #
Contact Person

To conduct a search:

- Enter information into one or more fields or leave all fields blank.
- Click the **Search** button.
  - ✓ Your search may result in this message "Your Search Criteria returns more than 60 rows, please add additional search criteria to narrow your search results."

Search for Executive Action cont'd

Executive Action Information

1. **Department:** Defaults on users department. Department must be selected, prior to any other search criteria. The department is the only field that must be filled in prior to any other search criteria. Some users will be able to select other departments, however only one department at a time.
2. **Select Office:** To select multiple offices, hold the **Ctrl key** and select.
3. **Executive Action Title:** Enter the first letter or first several letters of the Executive Action title. This would produce exact and partial matches with results containing the letter or combination of letters that you entered.
4. **Executive Action #:** Enter the number or leave blank.
5. Contact Person: Select the contact person's name in the drop-down list or leave blank.
6. **Project #:** Enter the number or leave blank.
7. **Grantor:** Select the grantor name in the drop-down list or leave blank.
8. **Provider:** Select the provider name in the drop-down list or leave blank.

Executive Action Dates

1. **Date Created Between; Start Date/End Date:** In designated box, enter the date range or leave blank.
2. **Date Submitted Between; Start Date/End Date:** In designated box, enter the date range or leave blank.

Other Information

1. **Executive Action Status:** Select the status from the drop-down list or leave blank.
2. **Send to User:** Select the name of the user from the drop-down list or leave blank. This field is useful when you want to find the actions that are sitting on the home page of a particular user. In this case, the user could have received the action and may or may not have acknowledged it.
3. **Send from User:** Select the name of the user from the drop-down list or leave blank. This field is useful when you want to find the actions that have been sent out by a particular user.

To conduct a search:

1. Enter information into one or more fields or leave all fields blank
2. Click the **Search** button to display the following screen:
   - ✓ Your search may result in this message "Your Search Criteria returns more than 60 rows, please add additional search criteria to narrow your search results."

Search for Executive Action cont'd

Executive Action Search Results

EA #	Date Created	Office	Title	Amount	Date Submitted	Status	
	3/18/2015	Human Service(s) - Aging	2015 SDE Test 5	$1,000.00	3/18/2015	Submitted	Click here for Details

First Previous 1 Next Last

Executive Action Search Results

1. **EA#:** Displays EA number for the searched and selected EA.
2. **Date Created:** Displays date selected EA was created.
3. **Office:** Displays office associated with the selected EA.
4. **Title:** Displays title of selected EA.
5. **Amount:** Displays the amount of the selected EA.
6. **Date Submitted:** Displays the date selected EA was submitted.
7. **Status:** Displays current status of selected EA.
8. **Click Here for Details:** Displays "Executive Action Details Screen".

Notes:

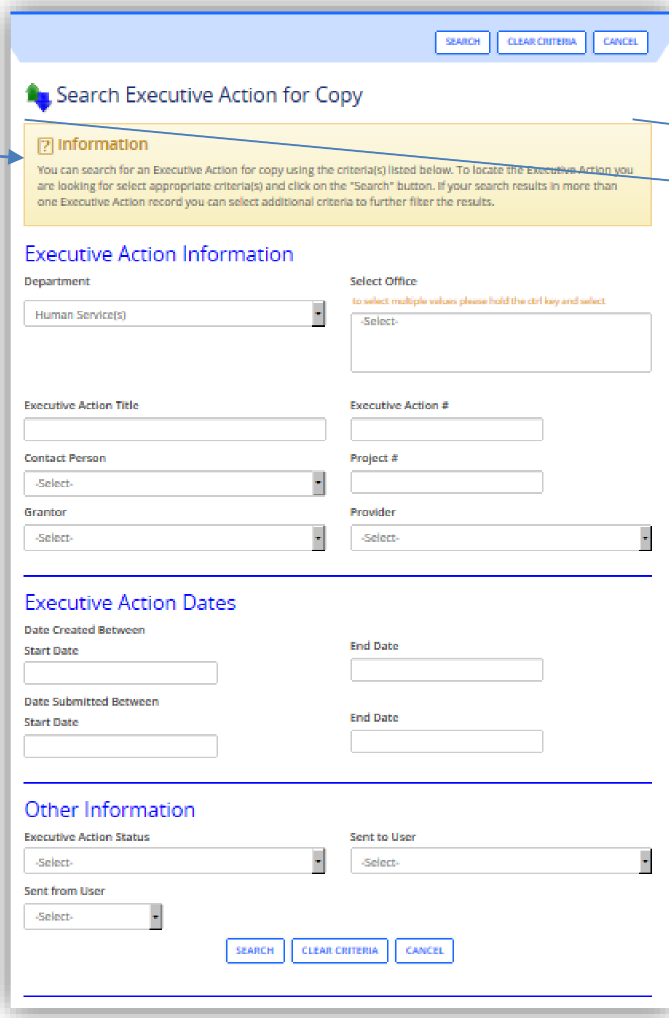
Search Executive Action for Copy

This screen is used for searching, if a user wants to find and copy an existing EA. EA's can be searched by various criteria to make a copy of that EA.

***Best Business Practice** says,* "This functionality is useful for annual events so you do not have to retype the same text."

From "MY Dashboard"

Executive Action->Copy



Information

You can search for an Executive Action for copy using the criteria(s) listed below.

To locate the Executive Action you are looking for select appropriate criteria(s) and click on the "Search" button.

If your search results in more than one Executive Action record you can select additional criteria to further filter the results.

Buttons: (top/bottom screen)
[Search]
[Clear Criteria]
[Cancel]

<u>Executive Action Search Criteria</u>
Department
Select Office
Executive Action Title
Executive Action #
Contact Person

To conduct a search:

- Enter information into one or more fields or leave all fields blank.
- Click the **Search** button.
  - ✓ Your search may result in this message "Your Search Criteria returns more than 60 rows, please add additional search criteria to narrow your search results."

Search Executive Action for Copy cont'd

Executive Action Information

1. **Department:** Defaults on users department. Department must be selected, prior to any other search criteria. The department is the only field that must be filled in prior to any other search criteria. Some users will be able to select other departments, however only one department at a time
2. **Select Office:** To select multiple offices, hold the **Ctrl key** and select.
3. **Executive Action Title:** Enter the first letter or first several letters of the Executive Action title. This would produce exact and partial matches with results containing the letter or combination of letters that you entered.
4. **Executive Action #:** Enter the number or leave blank.
5. **Contact Person:** Select the contact person's name in the drop-down list or leave blank.
6. **Project #:** Enter the number or leave blank.
7. **Grantor:** Select the grantor name in the drop-down list or leave blank.
8. **Provider:** Select the provider name in the drop-down list or leave blank.

Executive Action Dates

1. **Date Created Between; Start Date/End Date:** In designated box, enter the date range or leave blank.
2. **Date Submitted Between; Start Date/End Date:** In designated box, enter the date range or leave blank.

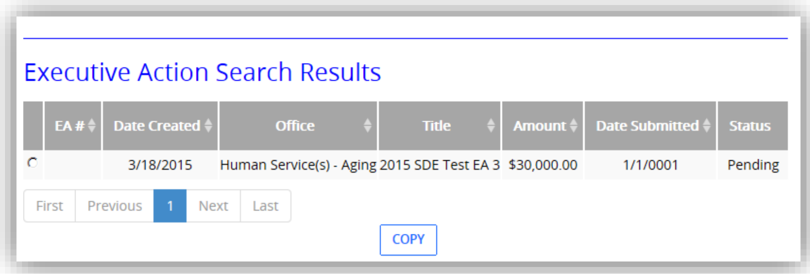
Other Information

1. **Executive Action Status:** Select the status from the drop-down list or leave blank.
2. **Send to User:** Select the name of the user from the drop-down list or leave blank. This field is useful when you want to find the actions that are sitting on the home page of a particular user. In this case, the user could have received the action and may or may not have acknowledged it.
3. **Send from User:** Select the name of the user from the drop-down list or leave blank. This field is useful when you want to find the actions that have been sent out by a particular user.

To conduct a search:

1. Enter information into one or more fields or leave all fields blank
2. Click the **Search** button to display the following screen:
   - ✓ Your search may result in this message "Your Search Criteria returns more than 60 rows, please add additional search criteria to narrow your search results."

Search Executive Action for Copy cont'd



Executive Action Search Results

1. **EA#:** Displays the EA number of the selected EA.
2. **Date Created:** Displays the date selected EA was created.
3. **Office:** Displays office associated with the selected EA.
4. **Title:** Displays title of selected EA.
5. **Amount:** Displays amount of selected EA.
6. **Date Submitted:** Displays the date selected EA was submitted.
7. **Status:** Displays current status of selected EA.

Buttons:

[Copy]

To Copy Executive Action

1. Identify EA to copy by selecting row.
2. Click **Copy** to display the "Enter New EA Screen".
   - ✓ "Copy for the Executive Action record is created successfully."
3. **Executive Action Title:** Create a unique name for the new copy.
4. Click **Save**
5. A new "Executive Actions Detail Screen" will display for this copy.

Notes:

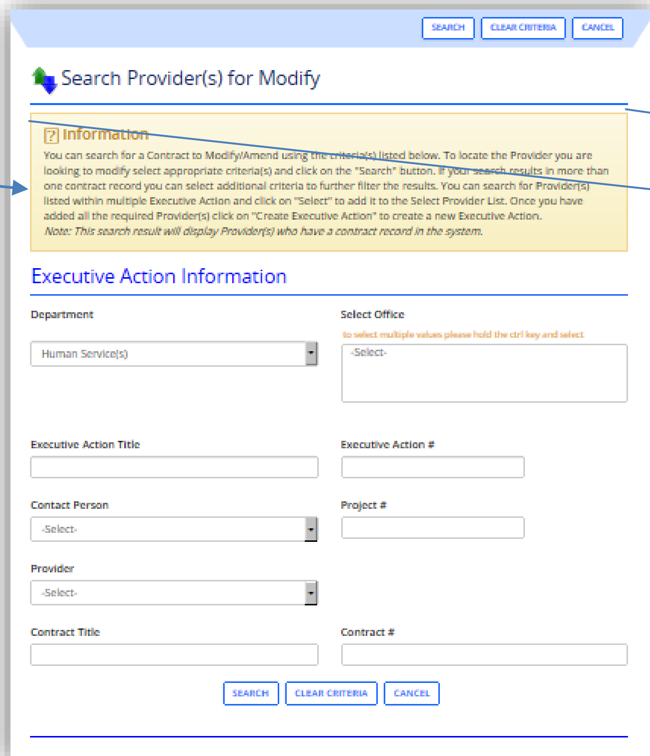
Search for Provider(s) to Modify

This screen is used for searching, if a user wants to find and modify a provider for an existing EA. An EA can be searched by various criteria to modify.

Best Business Process: Use this functionality when you are increasing or extending a provider/vendor contract.

From "MY Dashboard"

Executive Action->Modify



Information

You can search for a Contract to Modify/Amend using the criteria(s) listed below.

To locate the Provider you are looking to modify select appropriate criteria(s) and click on the "Search" button.

If your search results in more than one contract record you can select additional criteria to further filter the results.

You can search for Provider(s) listed within multiple Executive Action and click on "Select" to add it to the Select Provider List.

Once you have added all the required Provider(s) click on "Create Executive Action" to create a new Executive Action.

Note: This search result will display Provider(s) who have a contract record in the system.

Buttons: (top/bottom screen)
[Search]
[Clear Criteria]
[Cancel]

Executive Action Search Criteria

Department
Select Office
Executive Action Title
Executive Action #
Contact Person
Project #
Provider
Contract Title
Contract #

Search for Provider(s) to Modify cont'd

To conduct a search:

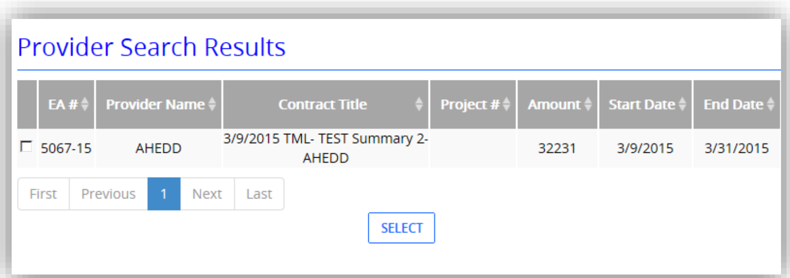
- Enter information into one or more fields or leave all fields blank
- Click the **Search** button.
  - ✓ Your search may result in this message "Your Search Criteria returns more than 60 rows, please add additional search criteria to narrow your search results."

Executive Action Information

1. **Department:** Defaults on users department. Department must be selected, prior to any other search criteria. The department is the only field that must be filled in prior to any other search criteria. Some users will be able to select other departments, however only one department at a time
2. **Select Office:** To select multiple offices, hold the **Ctrl key** and select.
3. **Executive Action Title:** Enter the first letter or first several letters of the Executive Action title. This would produce exact and partial matches with results containing the letter or combination of letters that you entered.
4. **Executive Action #:** Enter the number or leave blank.
5. **Contact Person:** Select the contact person's name in the drop-down list or leave blank.
6. **Project #:** Enter the number or leave blank.
7. **Grantor:** Select the grantor name in the drop-down list or leave blank.
8. **Provider:** Select the provider name in the drop-down list or leave blank.
9. **Contract Title:** Enter the contract title or leave it blank.
10. **Contract #:** Enter the contract number or leave it blank.

To conduct a search:

1. Enter information into one or more fields or leave all fields blank
2. Click the **Search** button to display the following screen:
   - ✓ Your search may result in this message "Your Search Criteria returns more than 60 rows, please add additional search criteria to narrow your search results."


Provider Search Results

	EA #	Provider Name	Contract Title	Project #	Amount	Start Date	End Date
☐	5067-15	AHEDD	3/9/2015 TML- TEST Summary 2-AHEDD		32231	3/9/2015	3/31/2015

Search for Provider(s) to Modify cont'd

Provider Search Results

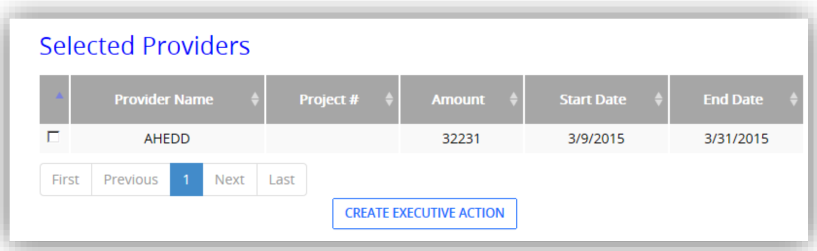
1. **EA#:** Displays EA# from the selected EA.
2. **Provider Name:** Displays the provider's name.
3. **Contract Title:** Displays the contract title.
4. **Project #:** Displays the project number.
5. **Amount:** Displays amount associated with the provider.
6. **Start Date:** Displays the start date of the provider contract.
7. **End Date:** Displays the end date of the provider contract.
8. **Provider Name:** Displays selected providers.
9. **Project #:** Displays the Project number.
10. **Amount:** Displays amount associated with the provider.
11. **Start Date:** Displays the start date of the provider.
12. **End Date:** Displays the end date of the provider.

Buttons:

[Select]

To Modify Provider

1. Identify EA to modify by selecting row.
2. Click **select;** the following screen will display:



3. Select provider
4. Click "Create Executive Action" button;
5. The "Enter New Executive Action Screen" will display.
6. **Executive Action Title:** a unique title must be chosen for modification.
7. **Executive Action Type:** dropdown box will default to "Modify Contract".
8. **Select or fill in all required information.**
9. Scroll down to the **Add Providers** section.
10. Click **Edit** to make necessary modifications.
11. Click **Delete** to remove provider.
12. Click **Save**
13. A new "Executive Actions Detail Screen" will display for this copy.

Repeat the process to select multiple providers to modify on this one EA. Once all providers/vendors are added to the modify screen, select them in the grid (confirming this provider contract needs carried to my new EA) and then click the create EA button from the "Executive Actions Detail Screen".

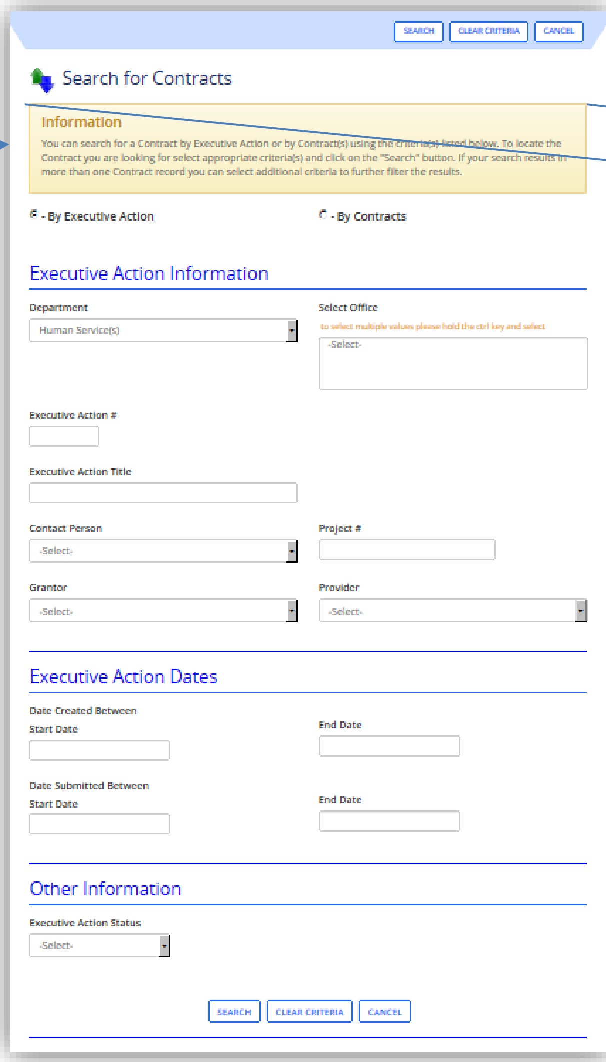
Search for Contracts by Executive Action

This screen is used for searching, if a user wants to find an existing Contract by an EA. Contracts can be searched by various EA criteria fields on the screen.

From "MY Dashboard"

Contracts->Search

a. Default **By Executive Action** Radio Button; the following screen will display:



Information
You can search for a Contract by Executive Action or by Contract(s) using the criteria(s) listed below.

To locate the Contract you are looking for select appropriate criteria(s) and click on the "Search" button.

If your search results in more than one Contract record you can select additional criteria to further filter the results.

Buttons: (top/bottom screen)
[Search]
[Clear Criteria]
[Cancel]

Executive Action Search Criteria
Department
Select Office
Executive Action #
Executive Action Title
Contact Person
Project #
Provider
Dates Created Between
Dates Submitted Between
Executive Action Status

To conduct a search:

- Enter information into one or more fields or leave all fields blank.
- Click the **Search** button.
  - ✓ Your search may result in this message "Your Search Criteria returns more than 60 rows, please add additional search criteria to narrow your search results."

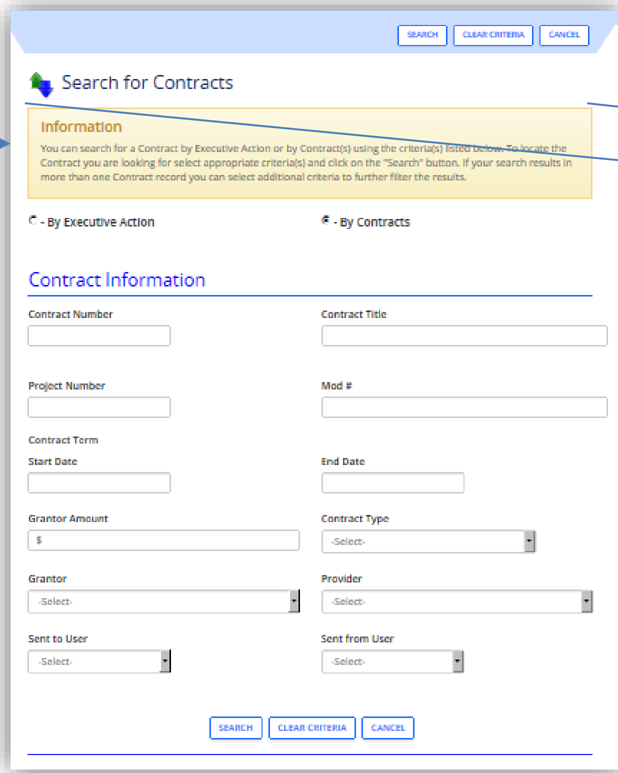
Search for Contracts by Contracts

This screen is used for searching, if a user wants to find an existing Contract by contract criteria. Contracts can be searched by various contract criteria fields on the screen.

From "MY Dashboard"

Contracts->Search

1. Select **By Contracts** Radio Button and the following screen will display:



Information

You can search for a Contract by Executive Action or by Contract(s) using the criteria(s) listed below.

To locate the Contract you are looking for select appropriate criteria(s) and click on the "Search" button.

If your search results in more than one Contract record you can select additional criteria to further filter the results.

Buttons: (top/bottom screen)

[Search]
[Clear Criteria]
[Cancel]

Executive Action Search Criteria

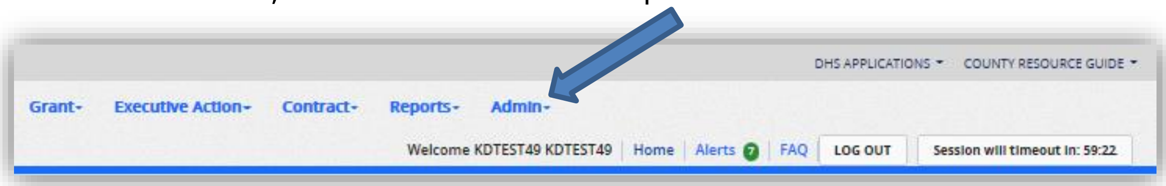
Contract Number
Contract Title
Project Number
Mod #
Contract Term: start/end dates
Grantor Amount
Contract Type
Grantor
Provider
Sent to User
Sent from User

To conduct a search:

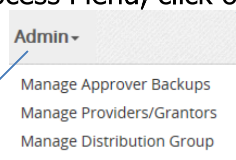
- Enter information into one or more fields or leave all fields blank.
- Click the **Search** button.
  - ✓ Your search may result in this message "Your Search Criteria returns more than 60 rows, please add additional search criteria to narrow your search results."

Section 6: Administrator Functions

Administrator Functions allows users with this role to manage Approver backups, Providers and Grantors, as well as Distribution Groups.



1. On the Process Menu, click on **Admin** a dropdown box will display:



Admin
Manage Approver Backups
Manage Approval Transfers
Manage Providers/Grantors
Manage Distribution Group

Notes:

From "MY Dashboard"

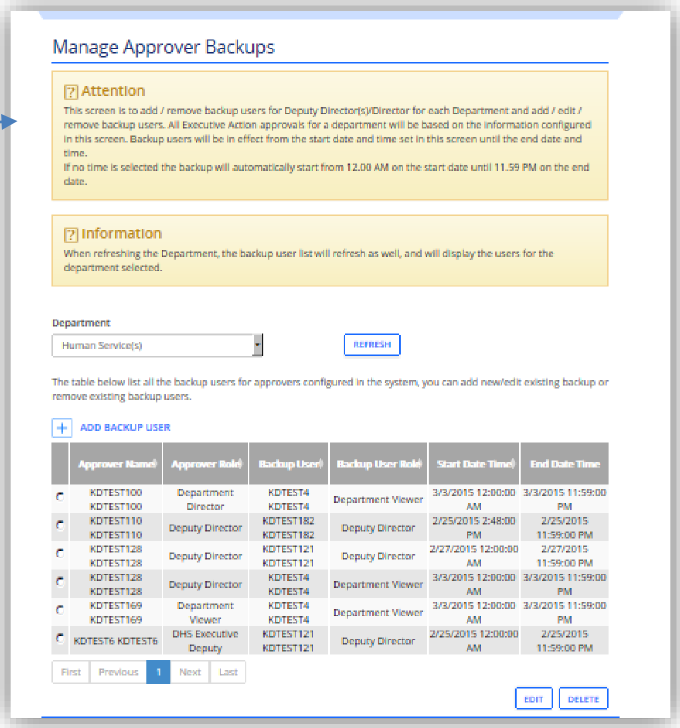
Admin> Manage Approver Backups

Manage Approver Backups

This screen is to add and remove backup users for Deputy Director(s) and Director(s) for each Department as well as add, edit, or remove backup users. All Executive Action approvals for a department will be based on the information configured in this screen. Backup users will be in effect from the start date and time set in this screen until the end date and time.

Best Business Practice** says, "Strongly suggest backups are end dated not deleted. **Only delete if they have never approved on the other user's behalf."

If no time is selected, the backup will automatically start from 12:00 AM on the start date until 11:59 PM on the end date.



Manage Approver Backups

Attention

This screen is to add / remove backup users for Deputy Director(s)/Director for each Department and add / edit / remove backup users. All Executive Action approvals for a department will be based on the information configured in this screen. Backup users will be in effect from the start date and time set in this screen until the end date and time.
If no time is selected the backup will automatically start from 12.00 AM on the start date until 11.59 PM on the end date.

Information

When refreshing the Department, the backup user list will refresh as well, and will display the users for the department selected.

Department

Human Service(s)

REFRESH

The table below list all the backup users for approvers configured in the system, you can add new/edit existing backup or remove existing backup users.

ADD BACKUP USER

	Approver Name	Approver Role	Backup User	Backup User Role	Start Date Time	End Date Time
	KDTEST100 KDTEST100	Department Director	KDTEST4 KDTEST4	Department Viewer	3/3/2015 12:00:00 AM	3/3/2015 11:59:00 PM
	KDTEST110 KDTEST110	Deputy Director	KDTEST182 KDTEST182	Deputy Director	2/25/2015 2:48:00 PM	2/25/2015 11:59:00 PM
	KDTEST128 KDTEST128	Deputy Director	KDTEST121 KDTEST121	Deputy Director	2/27/2015 12:00:00 AM	2/27/2015 11:59:00 PM
	KDTEST128 KDTEST128	Deputy Director	KDTEST4 KDTEST4	Department Viewer	3/3/2015 12:00:00 AM	3/3/2015 11:59:00 PM
	KDTEST169 KDTEST169	Department Viewer	KDTEST4 KDTEST4	Department Viewer	3/3/2015 12:00:00 AM	3/3/2015 11:59:00 PM
	KDTEST6 KDTEST6	DHS Executive Deputy	KDTEST121 KDTEST121	Deputy Director	2/25/2015 12:00:00 AM	2/25/2015 11:59:00 PM

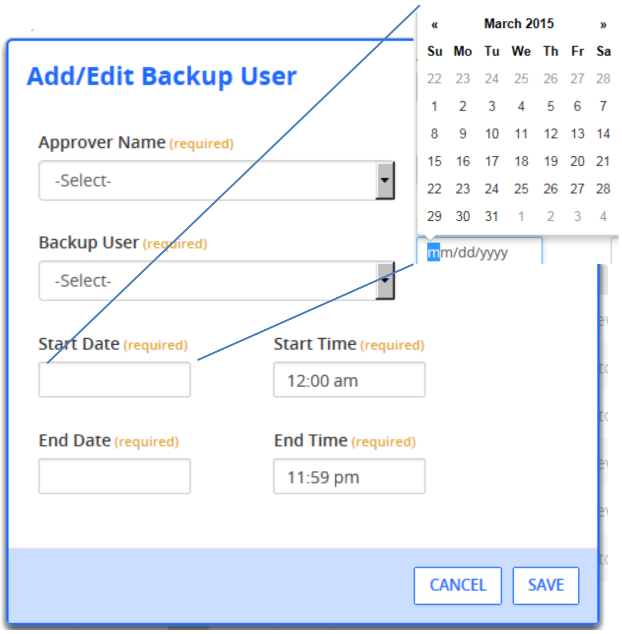
First Previous 1 Next Last

EDIT DELETE

To add backup Approver:

1. **Add Backup User:** Click the following screen will display:

Manage Approver Backups cont'd



If no time is selected, the backup user will automatically start from 12:00 AM on the start date until 11:59 PM on the end date.

2. **Approver Name:** Select Approve name from dropdown screen.
3. **Backup User:** Select backup name from dropdown screen. (user does not need to have same role)
4. **Start Date:** Enter date manually, mm/dd/yyyy or select from calendar pop-up.
5. **End Date:** Enter date manually, mm/dd/yyyy or select from calendar pop-up.
6. Click **Save** and back users will display in grid as follows:

ADD BACKUP USER

	Approver Name	Approver Role	Backup User	Backup User Role	Start Date Time	End Date Time
○	KDTEST100 KDTEST100	Department Director	KDTEST4 KDTEST4	Department Viewer	3/3/2015 12:00:00 AM	3/3/2015 11:59:00 PM
○	KDTEST110 KDTEST110	Deputy Director	KDTEST182 KDTEST182	Deputy Director	2/25/2015 2:48:00 PM	2/25/2015 11:59:00 PM
○	KDTEST128 KDTEST128	Deputy Director	KDTEST121 KDTEST121	Deputy Director	2/27/2015 12:00:00 AM	2/27/2015 11:59:00 PM
○	KDTEST128 KDTEST128	Deputy Director	KDTEST4 KDTEST4	Department Viewer	3/3/2015 12:00:00 AM	3/3/2015 11:59:00 PM
○	KDTEST169 KDTEST169	Department Viewer	KDTEST4 KDTEST4	Department Viewer	3/3/2015 12:00:00 AM	3/3/2015 11:59:00 PM
○	KDTEST6 KDTEST6	DHS Executive Deputy	KDTEST121 KDTEST121	Deputy Director	2/25/2015 12:00:00 AM	2/25/2015 11:59:00 PM

First Previous 1 Next Last

EDIT DELETE

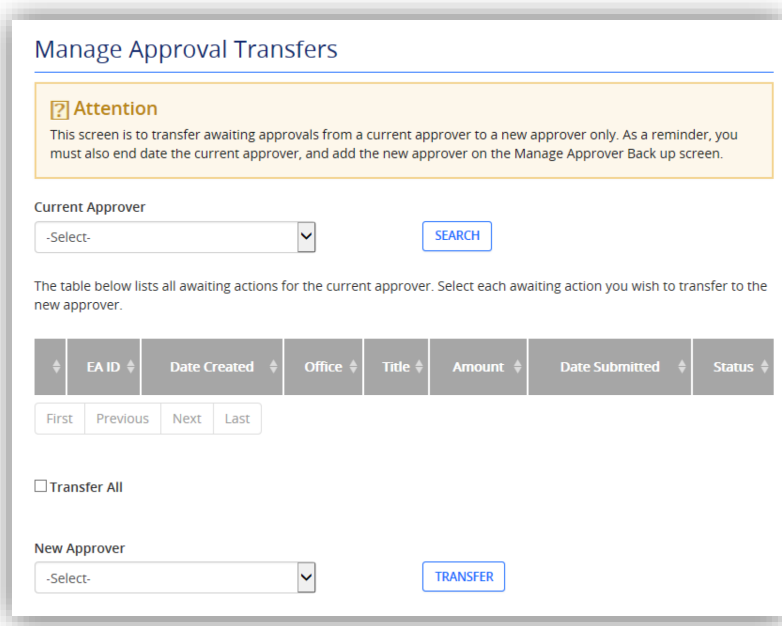
7. To remove, select the row and click delete.
8. To edit (end date or extend), select the row and click edit.

From "MY Dashboard"

Admin> Manage Approval Transfers

Manage Approval Transfer

This screen is to transfer awaiting approvals from a current approver to a new approver only. As a reminder, you must also end date the current approver, and add the new approver on the Manage Approver Back up screen.



To Transfer Approvals:

1. **Current Approver:** Select current approver from dropdown list.
2. Click **[Search]**.
3. The list of approvals will display in the grid.
4. Select the approvals to transfer.
5. **New Approver:** Select new approver from dropdown list.
6. Click **[Transfer]**.
7. All selected approvals will be transferred to the new approver.
8. As a reminder, you must also end date the current approver, and add the new approver on the Manage Approver Back up screen

From "MY Dashboard"

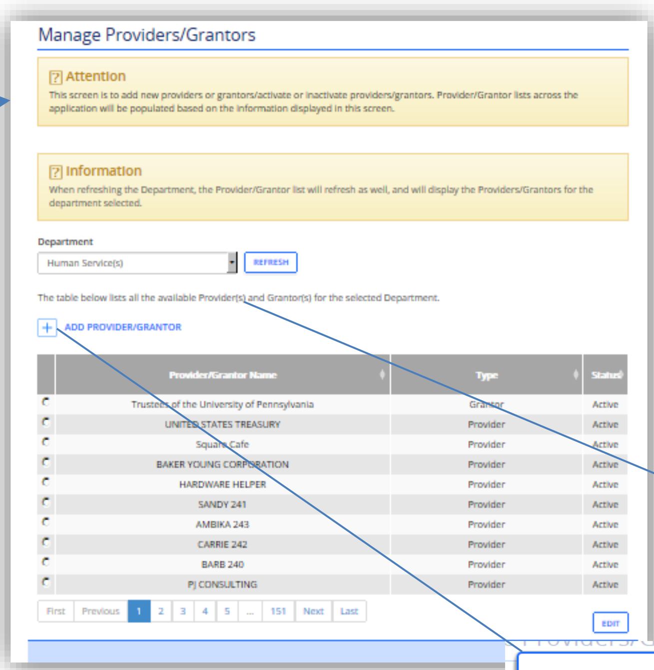
Admin> Manage Providers/Grantors

Best Business Practice: Making a grantor or provider means users can search for historical uses of that entity, but cannot use it going forward in a new EA, Grant or Contract

Manage Providers/Grantors

This screen is to add new providers/grantors activate or inactivate providers/Grantors. Provider/Grantor lists across the application will be populated based on the information displayed in this screen.

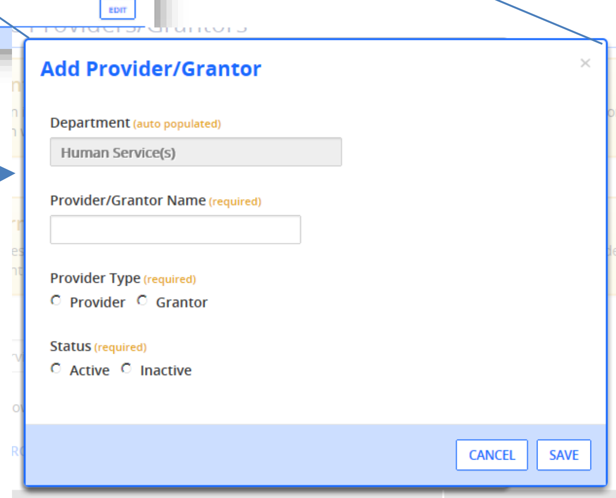
New & Improved!



Best Business Practice says, "Recommend provider/vendor names be taken from the W9 or the Vendor Creation Form."

To add Provider/Grantor:

1. Click on + and this box will Display.
2. Department: prepopulated
3. Provider/Grantor Name:
   - ✓ Enter name
4. Provider Type:
   - ✓ Select radio button
5. Status:
   - ✓ Select radio button
6. Provider/Grantor will display in grid.

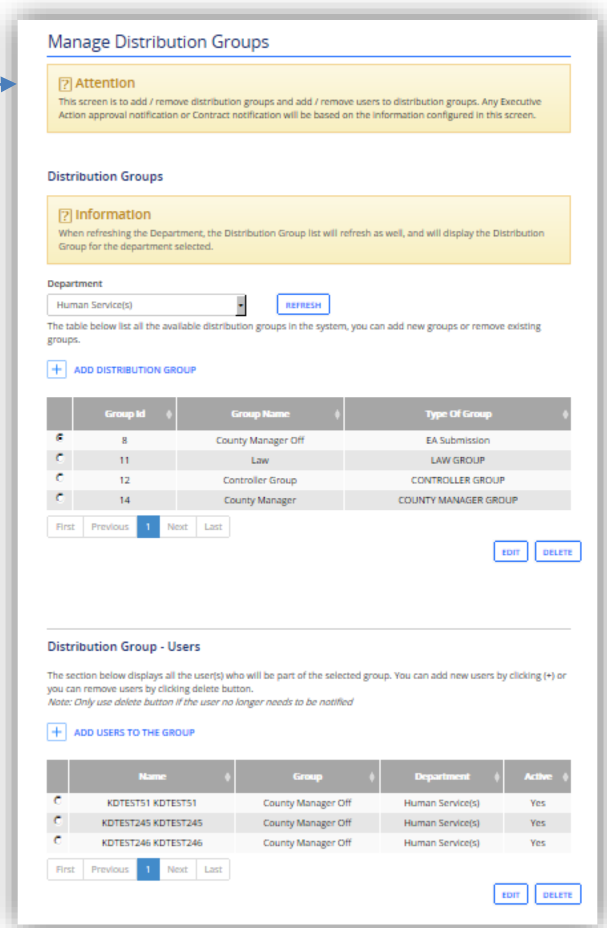


From "MY Dashboard"

Admin> Manage Distribution Group

Manage Distribution Group
This screen is to add or remove distribution groups for your department and add or remove users to distribution groups. <u>Any Executive Action approval notification or Contract notification will be based on the information configured in this screen.</u>

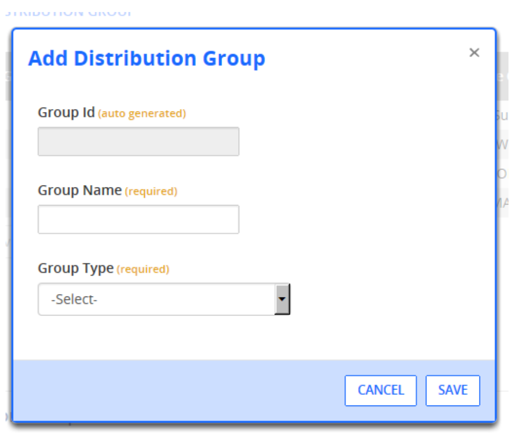
<u>Section 1: Distribution Groups</u>



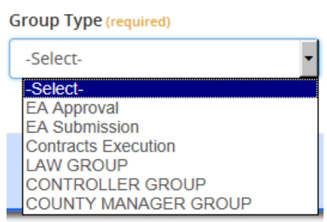
To add a Distribution Group:

1. **Department**: Defaults to user's department.
2. **Add Distribution Group**: Click or [+] to add distribution group. The following screen will display:

Manage Distribution Group cont'd

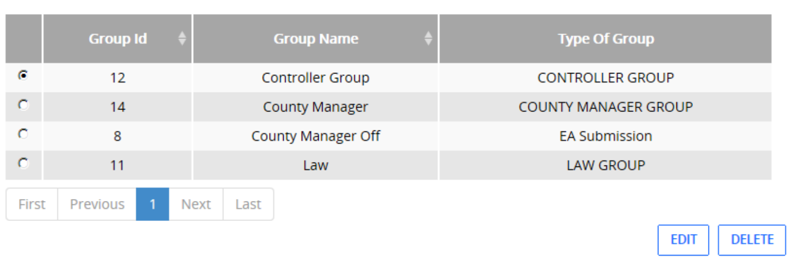


3. **Group Name:** Type in unique group name.
4. **Group Type:** Click on dropdown box and select group type.



- ➢ EA Approval
- ➢ EA Submission
- ➢ Contracts Execution
- ➢ Law Group (can only be managed by Law Office Group)
- ➢ Controller Group (can only be managed by Controller Group)
- ➢ County Manager Group (can only be managed by County Manager Group)

5. Click Save and the following screen will display:



	Group Id	Group Name	Type Of Group
◉	12	Controller Group	CONTROLLER GROUP
○	14	County Manager	COUNTY MANAGER GROUP
○	8	County Manager Off	EA Submission
○	11	Law	LAW GROUP

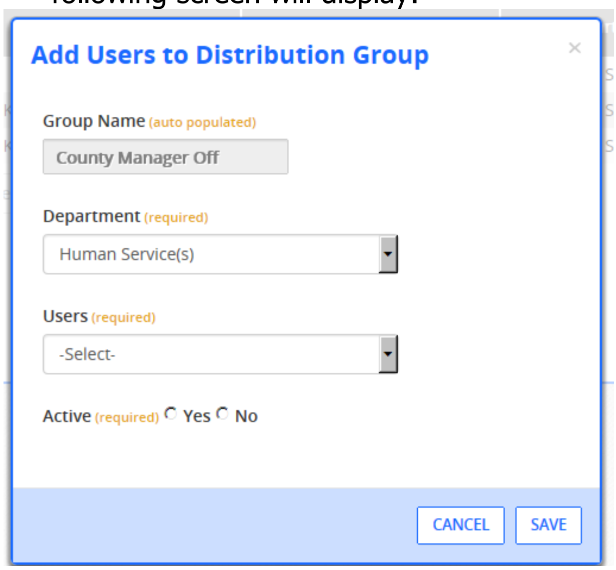
6. To remove, select the row and click delete.
7. To edit, select the row and click edit.

Manage Distribution Group cont'd

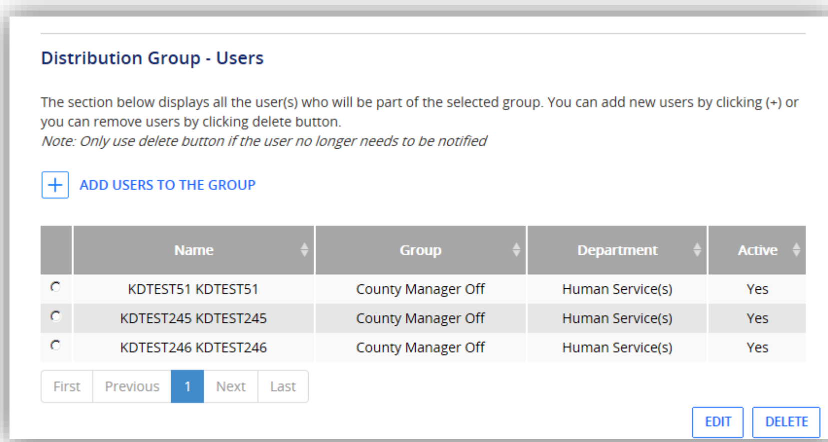
Section 2: Distribution Group - Users

To add users to the Distribution Group:

1. Select distribution group from Section 1 (Distribution Groups).
2. **Add Users to the Group**: Click on + to add user(s) to distribution group. The following screen will display:



3. **Group Name:** Prepopulated with group selected from Section 1.
4. **Department:** Select department
5. **Users:** Select user(s) from dropdown screen.
6. Click **Save** and the following screen will display:



	Name	Group	Department	Active
	KDTEST51 KDTEST51	County Manager Off	Human Service(s)	Yes
	KDTEST245 KDTEST245	County Manager Off	Human Service(s)	Yes
	KDTEST246 KDTEST246	County Manager Off	Human Service(s)	Yes

7. To remove, select the row and click delete.

Section 7: Knowledge Check

7

Section 7: Knowledge Check

Handout

Knowledge Check

Appendix 1: Roles

Here is a description of the roles available and the requirements for each role:

Creator – Ability to **CREATE** a Grant, Executive Action or Contract on behalf of their department and request an Executive Action for Approval (Every department must have at least one person in this role. Depending on the size of your department, you may have several).

Department Director – This is the individual within the Department responsible for submitting the Action to the County Manager.

Department Viewer – Ability to VIEW any Executive Action, Contract or Grant assigned to the department (Depending on the size of the department, this role may not be necessary or the department may have several).

Division Manager – This is an individual within the Department responsible for reviewing and authorizing an Executive Action prior to the Department Director (Depending on the size of the department, this role may not be necessary or the department may have several).

Department Administrator - This individual will have the ability/access to assign a backup user when someone within their normal process is out of the office, add new contractors or grantors to the list of available entities, and move actions or contracts to/from particular stages/users in the event of an unforeseen absence or need or return an action/contract to a user if that user processed the action through incorrectly. (Every department needs to **assign** only **one individual** to this role).

Based on the requirements, there may be individuals who need to be assigned to multiple roles.

Appendix 2: Resources

County Resources

Gina Buzzard Administrative Assistant Department of Budget and Finance
gina.buzzard@alleghenycounty.us 412-350-5788

Mary Soroka Director of Budget & Finance
mary.soroka@alleghenycounty.us 412-350-7372

Department of Human Services Resources

Kathy Heinz Contracts Unit Manager Department of Human Services
kheinz@alleghenycounty.us 412-350-5480

Stacey Tunie Performance Improvement Analyst Education/Training & Organizational Dev.
stacey.tunie@alleghenycounty.us 412-350-4547

JW Wallace Administrator Education/Training & Organizational Development
JW.Wallace@alleghenycounty.us 412-350-3689

Education/Training & Organizational Development
Email address: DHS-ETOD@alleghenycounty.us

Service Desk
Phone: 412-350-4357
Email address: servicedesk@alleghenycounty.us

Thank You