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

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April 7, 2015

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ACTION TRACKER MODERNIZATION 2015

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
- 4 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:



Section 1: Logging Into Action Tracker

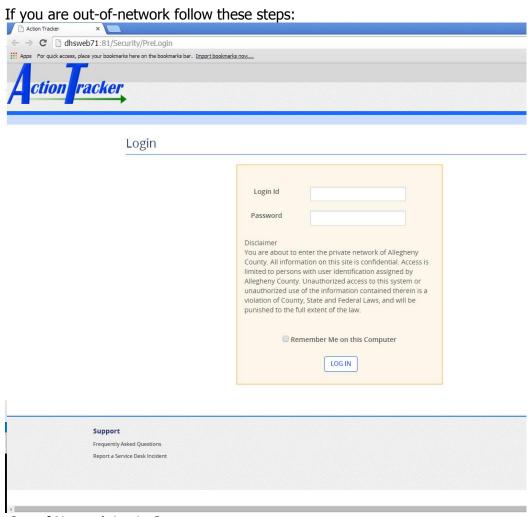
Section 1: Logging Into Action Tracker

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



Out-of Network Login Steps:

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 <u>sevicedesk@alleghenycounty.us</u>

Section 2: Homepage - My Dashboard



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 **t** 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.

| Action racker | DHS APPLICATIONS = COUNTY RESOURCE GUIDE = Grant = Executive Action = Contract = Reports = Welcome KDTEST23 KDTEST23 Home FAQ Loc OUT Exession will timeout in: 35.31 |
|---------------|---|
| | My Dashboard |
| | My Grants - without Executive Action |
| | My Grants - with Executive Action |
| | My Executive Actions - New / Pending |
| | My Executive Actions - Submitted / Approved |
| | Received Executive Actions |
| | My Contracts - New / Active |
| | My Contracts - Executed |
| | Received Contracts |

User Roles:

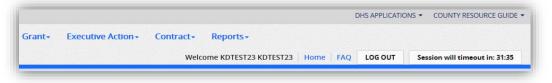
- ✓ Administrator
- ✓ Approver
- ✓ Creator
- ✓ Viewer



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 | | |
| Сору | Сору | | |
| 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.

| My Grants - with | nout Executive Act | ion | |
|--|--|--------------------------------------|-----------------------------|
| Below are list of Grants you | have created that are waitir | ng for you to initiate an Execut | ive Action |
| Grant Titled: 2015 S | DE Test Grant 1 82 | | |
| Start Date: 3/1/2015 Revenue Amount: \$1000 | End Date: 3/31/2015 Award/Allocation received 2/1/2015 | Created On: 3/9/2015 date: | Updated On: 3/9/2015 |
| | | | |

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.



| Details Screen | My Grants – | Without Executive | Action Collapsed |
|-----------------|--|--|------------------|
| Doutino Doi com | The area of the second se | The second secon | needen gonapsea |

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) | | | _ | _ |
| | epartment | \$ | | fice 🔶 |
| First Previous 1 Next Las | nan Service(s) | | Ag | ing |
| Grant Details | | | | |
| rant Title D15 SDE Test Grant 1 | | Grant Activity New Grant | Grant 1000sc | |
| rant Term | | | | |
| art date 1/2015 | | End date 3/31/2015 | | |
| | | | | |
| Explanation/Description | | | | |
| To restore fixtures in current reside | nce | | | |
| | | | | |
| | | | | |
| | | | | |
| Notes | | | | |
| | | | | |
| | | | | |
| | | | | |
| Grantor Requirements | | | | |
| Funds must be deposited in a separa | ite account | | | |
| | | | | |
| Grantor Information | | | | |
| Grantors within the Grant | | | | |
| Grantor | Start 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 | | | | |
| | oject Number 👙 | Amount 🗍 Fee? 🖨 | Agreement Number | Need Contract? |
| ACTION-HOUSING INC | | \$1,000.00 No | | Yes |
| First Previous 1 Next | Last | | | |
| Executive Action Inform | ation | | | |
| Executive Action within this | Grant | | | |
| EA # Executive Action | n Title | Status Cost/R | evenue Amount 🛛 🌲 | Last User |
| First Previous Next Last | | | | |
| | | | | |
| | JPDATE CREAT | E EXECUTIVE ACTION ARCH | IIVE 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.



My Grants – with Executive Action

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

| My Grants - with | n Executive Actior | ו | |
|------------------------------|----------------------------|----------------------|----------------------|
| Below are list of Grants you | have created related to an | Executive Action | |
| Grant Titled: Test M | <u>ike</u> රි | | |
| <u>orane neica resem</u> | | | |
| Start Date: 3/3/2015 | End Date: 3/3/2017 | Created On: 3/3/2015 | Updated On: 3/3/2015 |

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.



Details Screen -- My Grants - with Executive Action Collapsed

| Grant Details |
|------------------------------|
| Office(s) |
| Grant Details |
| Crantor Information |
| Provider Information |
| Executive Action Information |
| ARCHIVE CANCEL |

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 | | | | |
| | | | | |
| fice(s) | | | | |
| | | | | |
| | Department 4 | | Office | \$ |
| | Public Works | | Bridge Division | 1 |
| First Previous 1 | Next Last | | | |
| Grant Details | | | | |
| Grant Title Test Mike | | Grant Activity New Grant | Grar 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 Inform | | | | |
| Grantors within the | Grant | _ | _ | _ |
| | | Start Date 🖨 | | |
| PENNSYLVANIA INFR | ASTRUCTURE INVESTMENT AUTHORITY | 3/3/2015 | 3/3/2017 \$1,234 | 4.00 Yes |
| First Previous 1 | Next Last | | | |
| | | | | |
| Provider Inform | nation | | | |
| Provider(s) within th | ne Grant | | | |
| Provider Name 👙 | Project Number 👙 Amount 👙 | | | |
| PENNDOT | 1234 \$0.00 | No | 1245 | Yes |
| First Previous 1 | Next Last | | | |
| | | | | |
| | on Information | | | |
| Executive Action wi | thin this Grant | | | |
| EA ## Executive A | action Title 🗍 Status 🗍 Cost/Reven | Je Amount 🌲 | Last User 🛛 🌲 | |
| SQ03 (| | | DTEST23 KDTEST23 | <u>Click here for Details</u> |
| First Previous 1 | | | | |
| | ARCHIVE | CANCEL | | |
| | ANCHIVE | | | |



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.

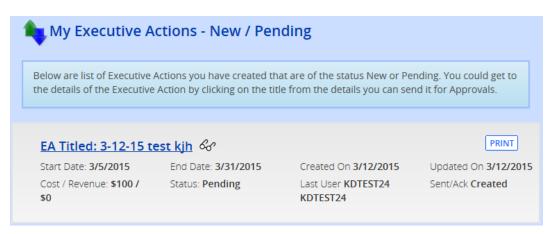
Buttons

- **[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.



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.



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

| Back to Dashboard | Executive Action ID: 12782 |
|---|--------------------------------------|
| Economic Development Not Started In Progress | Executive Action Details |
| Economic Development Director Approval County Manager's Office County Manager's Office Group | JDE Codes |
| Assistant County Manager's Review County Manager Approval EA Approved | Financial Information |
| | Provider Information |
| | Attachments |
| | Executive Action Tracking |
| | SEND TO DIRECTOR UPDATE PRINT CANCEL |



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.

Section 2: Homepage - My Dashboard

My Executive Actions New/Pending Details Page Expanded



My Executive Actions New/Pending Details Page Expanded UPDATE PRINT CANCEL Executive Action ID: 12782 Back to Dashboard Economic Development Not Started Lexecutive Action Details In Progress Executive Action Title 3-12-15 test kjh Current Status Pending EA# Economic Develo Executive Action Type Modify Contract County Manager's Office County Manager's Office Group Approver List: Economic Development Department Director : KDTEST105 KDTEST105 County Manager : KDTEST193 KDTEST193 Assistant County Manager's Revie County Manager Approval EA Approved Contact Person KDTEST24 Extension Summary test kjh 3-12-15 Explanation test kjh 3-12-15 LIDE Codes First Previous Next Last Financial Information Estimated Cost \$100.00 Estimated Revenue County Match Included in the Budget? For Grant Operating Future Impact Revider Information Provider(s) within the Executive Action ALLEGHENY COUNTY M/W/DBE \$100.00 Yes Yes DEPARTMENT First Previous 1 Next Last Funding Types(s) for the Provider First Previous Next Last 触 Attachments First Previous Next Last



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

| • | utive Action Trac | king | | | | | |
|---|-------------------------|----------------------|-------------------------|-----------------------------|--------------|---------|-----------------------------|
| From \$ | Action History | То 🕴 | Department To | Date \$ | Status | State) | Notes |
| KDTEST24 KDTEST24 | Economic Development | KDTEST24 KDTEST24 | Economic Development | 3/12/2015 10:44:45 AM | Pending | Created | Executive Action Created |
| First Pr Send Docum -Select- Notes | nent To | Last | | 5END (200 c | haracter lim | 12) | |
| | | | | | | | |
| | | SEND TO DIRE | CTOR UPDATE | PRINT | CANCEL | | |

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.
 - F 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 **<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.

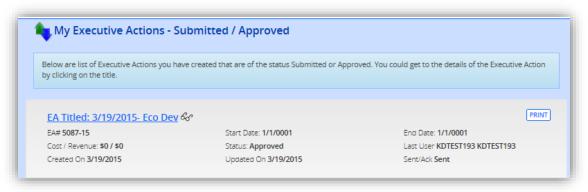
Buttons:

- [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

| Back to Dashboard | Executive Action ID: 12811 CANCEL |
|---|-----------------------------------|
| Economic Development | Executive Action Details |
| County Manager's Office | JDE Codes |
| County Manager's Office Group Assistant County Manager's Review County Manager Approval | Financial Information |
| EA Approved | Provider Information |
| | Attachments |
| | Executive Action Tracking |
| | ACKNOWLEDGE PRINT CANCEL |

New Burner

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

| Back to Dashboard | Executive Action ID: 12811 | | PRINT CANCEL |
|-------------------------------------|--|--|--------------------------|
| Economic Development | | | |
| | | | |
| | Executive Action Details | | |
| Operations Deputy Director Approval | Executive Action Title 3/19/2015- Eco Dev | Current Status Approved | EA# 5087-15 |
| Economic Development Director | | | |
| Approval | Executive Action Type Accept Grant | | |
| County Manager's Office | Approver List | | |
| County Manager's Office Group | Operations Deputy Director : KDTEST158 KDTEST158 (1) | | |
| Assistant County Manager's Review | County Manager : KDTEST193 KDTEST193 (19-MAR-15) | US KDTESTTUS (19-MAR-15) | |
| County Manager Approval | Contact Person | Extension | |
| EA Approved | KDTEST24 | 0 | |
| | Summary | | |
| | testing | | |
| | | | |
| | | | |
| | Explanation | | |
| | testing | | |
| | | | |
| | | | |
| | | | |
| | JDE Codes | | |
| | Code Type | | Codes \$ |
| | coue type | Ť | |
| | | | |
| | First Previous Next Last | | |
| | | | |
| | First Previous Next Last | | |
| | | Estimated Revenue | |
| | Financial Information | Included in the Budget? | |
| | Financial Information Estimated Cost County Match | Included in the Budget? Yes | |
| | Financial Information | Included in the Budget? | |
| | Financial Information Estimated Cost County Match | Included in the Budget? Yes For | |
| | Estimated Cost County Match Future Impact | Included in the Budget? Yes For | |
| | Future Impact Provider Information | Included in the Budget? Yes For | |
| | Estimated Cost County Match Future Impact | Included in the Budget? Yes For | |
| | Future Impact Provider Information | Included in the Budget? Yes For | r ♦ Need Contract2 ♦ ♦ |
| | Estimated Cost County Match Future Impact Provider Information Provider(s) within the Executive Action | Included in the Budget? Yes For Operating | r 🕴 Need Contract? 🖗 🕴 |
| | First Previous Next Last | Included in the Budget? Yes For Operating | r § Need Contract? \$ \$ |
| | Functial Information Estimated Cost County Match Future Impact Provider Information Provider(s) within the Executive Action Provider(s) within the Executive Action Provider(s) within the Executive Action Provider Name Provider Number Amount Function | Included in the Budget? Yes For Operating | |
| | First Previous Next Last | Included in the Budget? Yes For Operating | r 8 Need Contract? 8 8 |
| | Functial Information Estimated Cost County Match Future Impact Provider Information Provider(s) within the Executive Action Provider(s) within the Executive Action Provider(s) within the Executive Action Provider Name Provider Number Amount Function | Included in the Budget? Yes For Operating | |
| | | Included in the Budget? Yes For Operating | |
| | | Included in the Budget? Yes For Operating | |
| | | Included in the Budget? Yes For Operating | |
| | | Included in the Budget? Yes For Operating | |
| | Financial Information Estimated Cost County Match Future Impact Provider Information Provider Information Provider Information Provider Information Provider Name (Project Number (Amount)) First Previous Next Last Funding Types(s) for the Provider Provider (Provider (Entropy)) First Previous Next Last Funding Types(s) for the Provider Provider (Provider (Entropy)) Next Last | Included in the Budget? Yes For Operating | 0 Amoure 0 |



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

| 🝬 Exec | utive Action Trac | king | | | | | |
|------------------------|----------------------------|------------------------|----------------------------|----------------------------|-----------|-------------|---|
| 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 | | 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 | | Acknowledge | 0 |
| 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 | | 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 | | Acknowledge | |
| KDTEST158 KDTEST158 | Economic Development | KDTEST105 KDTEST105 | | 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 Pr | revious 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 <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.

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.



Received Executive Actions

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

| Received Execu | tive Actions | | |
|---|---------------------------------------|--------------------------------|---------------------------|
| Below are list of Executive Executive Action by clicking | · · · · · · · · · · · · · · · · · · · | r review or approval. You coul | d acknowledge the |
| <u>EA Titled:</u> රින් | | | PRINT |
| Start Date: 7/12/2014 | End Date: 6/30/2015 | Created On 3/9/2015 | Updated On 3/9/201 |
| Cost / Revenue: \$0 / \$0 | Status: Pending | Last User KDTEST21 KDTEST21 | Sent/Ack Created |

Title: Get to the details by clicking on the title or the *details* [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.



Details Screen -- Received Executive Actions Collapsed

| Back to Dashboard | Executive Action ID: 11585 UPDATE PREVIEW CANCEL |
|--|--|
| Human Service(s) | Executive Action Details |
| Human Service(s) Director Approval County Manager's Office County Manager's Office Group County Manager's Approval | JDE Codes |
| EA Approved | Financial Information |
| | Provider Information |
| | Attachments |
| | Executive Action Tracking |
| | SEND TO DIRECTOR UPDATE PREVIEW CANCEL |



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

| Back to Dashboard | Executive Action ID: 12768 | UPDATE PRINT CANCEL |
|------------------------------------|---|--|
| Human Service(s) | | |
| Not Started | Executive Action Details | |
| In Progress | Executive Action Title | Current Status EA# |
| Human Service(s) Director Approval | | Pending |
| County Manager's Office | Executive Action Type | |
| County Manager's Office Group | Approver List: | 777100 |
| Assistant County Manager's Review | Human Service(s) Department Director : KDTEST100 KD County Manager : KDTEST193 KDTEST193 | VTEST100 |
| County Manager Approval | | |
| EA Approved | Contact Person | Extension 0 |
| | Summary | |
| | | |
| | | |
| | | |
| | Explanation | |
| | | |
| | | |
| | | |
| | | |
| | JDE Codes | |
| | Code Type | ♦ Codes ♦ |
| | | |
| | First Previous Next Last | |
| | | |
| | Financial Information | |
| | Estimated Cost | Estimated Revenue |
| | County Match | Included in the Budget? |
| | Future Impact | |
| | Provider Information | |
| | Provider(s) within the Executive Action | |
| | Provider Name Project Number 🗍 Amount 🖗 | Fee? |
| | | |
| | FAMILY RESOURCES S-1 UAT \$1,000.00 | No 11514 Yes |
| | First Previous 1 Next Last | |
| | Funding Types(s) for the Provider | |
| | Provider 💠 Project Number | |
| | First Devices New Last | |
| | First Previous Next Last | |
| | | |
| | Attachments | |
| | Attachment Type | 🗧 🛛 File Name 🗍 |
| | | |
| | First Previous Next Last | |
| | | |
| | L Executive Action Tracking | |
| | Executive Action History | |
| | | |
| | From 🕴 Department From 🕸 To 🔶 Departm | |
| | KDTEST21 Human Service(s) KDTEST21 Human S | 3/9/2015 iervice(s) 5:01:05 Pending Created Created |
| | KOTESTZT | PM Created |
| | First Previous 1 Next Last | |
| | Send Document To | SEND |
| | -Select- | SCNU |
| | Notes | (200 character limit) |
| | NULES | (200 character limit) |
| | | |
| | | |
| | | |
| | SEND TO DIRECTOR | UPDATE PRINT CANCEL |



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
 - Vellow 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 ^[62] [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.



Details Screen – My Contracts – New/Active Collapsed

| Contract Details | | | |
|----------------------------------|---|---------------------------------------|---------------------------------------|
| • | | | |
| General Information | | | |
| | | | |
| • | | | |
| | | | |
| L. Contract Information | | | |
| • | | | |
| • | | | |
| Contract Phase Tracking | | | |
| | | | |
| Contract Status | Missing Docs Reason | | |
| New | to select multiple values please h to unselect values please hold th | | lect |
| | -Select- | ~ | |
| | Missing JDE Docs Missing Other Program D Missing Insurance Docs | | |
| Summary | Missing insurance Docs | | |
| Summary | | | |
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| | | | |
| | | | |
| | SAVE | | |
| Contract and Executive Action Hi | istory | | |
| | | | |
| Contract Tracking and Comment | 2 | | |
| ADJUST CONTRACT | ARCHIVE CONTRACT LOG CANC | EL | |
| | Contract Tracking and Comment | Contract and Executive Action History | Contract and Executive Action History |

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

Section 2: Homepage - My Dashboard Details Screen – My Contracts – New/Active Collapsed



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.

Section 2: Homepage - My Dashboard My Contract – New/Active Details Screen Expanded



My Contract – New/Active Details Screen Expanded ADJUST CONTRACT CONTRACT LOG CANCEL Contract Id: 11594 Back to Dashboard Not Started **C**ontract Details Date Allocation Received Sent to Provide General Information Received from Provider Contract Title EA # Rev # Work Statement Received 3/9/2015 TML- TEST Summary 2-AHEDD 5067-15 1 Budget Received Provider Name Project # Project Description Date JDE Form Requested AHEDD Date IDE Form Received Start Date End Date Sent to Director 3/9/2015 3/31/2015 Received from Director Sent to Law Department Contract Information ived from Law Department by **County Manager** Contract Type (required) Mod # Contract # Signed by County Manager Original Sent to Controller Initial Allocation Amount Current Allocation Amount Received at Controller \$32,231,00 \$32,231,00 Execution Date Lontract Phase Tracking **Contract Phase 1** Date Allocation Received Sent to Provider 03/11/2015 03/11/2015 **Contract Phase 2 Received from Provider** Budget Received Work Statement Received 03/11/2015 03/11/2015 03/11/2015 Date JDE Form Received Sent to Director Date JDE Form Requested 03/11/2015 03/11/2015 03/11/2015 Received from Director 03/11/2015 **Contract Phase 3** Sent to Law Department 03/11/2015 **Contract Phase 4** Sent to Controller Received from Law Department by Signed by County Manager County Manager 03/11/2015 03/11/2015 03/11/2015



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

| ontract Sta Active | atus • | | | | cs Reason tiple values please alues please hold ti | | | |
|--|--|---|---|---|---|------------------|-----------------|-----|
| | | | | Missing J Missing C | DE Docs Other Program nsurance Docs | D | | |
| Notes | | | | | | | | |
| dfsd | | | | | | | | |
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| | ntract Tracking a | nd Comn | | EL | | | | |
| • | ntract Tracking ai t Tracking | nd Comn | | <u> </u> | | | | |
| • | | nd Comm | | EL Date ≑ | Changed B∳ | Status | State 🗘 | Not |
| Contrac | t Tracking Department From¢ County Manager's | To 🗘 | Department To | Date ≑ 3/11/2015 | | | | Not |
| Contrac From KDTEST51 KDTEST51 | t Tracking Department Front County Manager's Office | To 🖨 Controller Group | Department To | Date \$ 3/11/2015 5:09:49 PM 9(11/2015 | KDTEST51 | Status Active | State 🗍 Sent | Not |
| Contrac From¢ KDTEST51 | t Tracking Department From County Manager's Office County Manager's | To 🖨 Controller Group | Department To | Date \$ 3/11/2015 5:09:49 PM 9(11/2015 | KDTEST51 | | | Not |
| Contrac From¢ KDTEST51 KDTEST51 KDTEST51 | t Tracking Department Front County Manager's Office County Manager's Office | To \$ Controller Group | Department To County Manager's | Date \$ 3/11/2015 5:09:49 PM 3/11/2015 5:09:44 | KDTEST51 | Active | Sent | Not |
| Contrac From¢ KDTEST51 KDTEST51 KDTEST51 KDTEST51 | t Tracking Department Front County Manager's Office County Manager's Office | To \$ Controller Group KDTEST51 KDTEST51 | Department To County Manager's | Date \$ 3/11/2015 5:09:49 PM 3/11/2015 5:09:44 | KDTEST51 | Active | Sent | Not |
| Contrac From¢ KDTEST51 KDTEST51 KDTEST51 KDTEST51 | t Tracking Department From County Manager's Office County Manager's Office Previous 1 Ne | To ¢ Controller Group KDTEST51 KDTEST51 kDTEST51 | Department To County Manager's Office | Date \$ 3/11/2015 5:09:49 PM 3/11/2015 5:09:44 | KDTEST51 | Active | Sent Updated | Not |
| Contrac From KDTEST51 KDTEST51 KDTEST51 First Comm | t Tracking Department From County Manager's Office County Manager's Office Previous 1 Ne ent Log Responsible Par | To \$ Controller Group KDTEST51 KDTEST51 ext Last | Department To County Manager's Office | Date \$ 3/11/2015 5:09:49 PM 3/11/2015 5:09:44 PM | KDTEST51 | Active | Sent Updated | |
| Contrac From¢ KDTEST51 KDTEST51 KDTEST51 KDTEST51 | t Tracking Department From County Manager's Office County Manager's Office Previous 1 Ne ent Log | To ¢ Controller Group KDTEST51 KDTEST51 kDTEST51 | Department To County Manager's Office | Date \$ 3/11/2015 5:09:49 PM 3/11/2015 5:09:44 PM | KDTEST51 | Active | Sent Updated | Not |
| Contrac From KDTEST51 KDTEST51 KDTEST51 First Comm | t Tracking Department From County Manager's Office County Manager's Office Previous 1 Ne ent Log Responsible Par | To \$ Controller Group KDTEST51 KDTEST51 ext Last ty Last | Department To County Manager's Office | Date \$ 3/11/2015 5:09:49 PM 3/11/2015 5:09:44 PM | KDTEST51 | Active | Sent Updated | |
| Contrac From KDTEST51 KDTEST51 KDTEST51 First Comm | t Tracking Department From County Manager's Office County Manager's Office County Manager's Office Previous 1 Next Responsible Part ible Party | To Controller Group KDTEST51 KDTEST51 ext Last Last | Department To County Manager's Office | Date \$ 3/11/2015 5:09:49 PM 3/11/2015 5:09:44 PM | KDTEST51 | Active | Sent Updated | |



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.

Section 2: Homepage - My Dashboard My Contract – New/Active Details Screen Expanded



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.



My Contracts - Executed

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

| My Contr | acts - Executed | | |
|--|---|----------------------------------|-----------------------------|
| Below are list of C the Contract by cli | ontracts you have created that are o cking on the title. | of the status Executed. You coul | d get to the details of |
| <u>Contract Tit</u> | ed: UAT CMO AND CONTR | OLLERWARD HOME FO | <u>R CHILDREN</u> රි |
| Contract #: 988 | Provider: WARD HOME FOR CHILDREN | Cost / Revenue: \$50000 | Status: Executed |
| Start Date: 2/1/2016 | End Date 4/30/2016 | Created On 3/10/2015 | Updated On 3/11/2015 |
| Sent/Ack Sent | Last User KDTEST9 KDTEST9 | | |

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 – My Contracts – Executed Collapsed

| ack to Dashboard | Contract Id: 11519 | ADJUST CONTRACT CONTRACT LOG CANCEL |
|---|----------------------------|---|
| Not Started | | |
| Date Allocation Received | Contract Details | |
| Sent to Provider | General Information | |
| Received from Provider | | |
| Work Statement Received | | |
| Budget Received | Contract Information | |
| Date JDE Form Requested | • | |
| Date JDE Form Received | | |
| Sent to Director | Contract Phase Tracking | |
| Received from Director | | |
| Sent to Law Department | Contract Status | Missing Docs Reason |
| Received from Law Department by County Manager | Executed | to select multiple values please hold the ctrl key and select to unselect values please hold the crtl key and select |
| Signed by County Manager | | -Select- Missing JDE Docs |
| Sent to Controller | | Missing Other Program D |
| | | wissing insurance bocs |
| Received at Controller Execution Date | Summary | |
| Execution Date | eqwrwerwe | |
| | | |
| | | |
| | | |
| | | |
| | | CANCEL |
| | Contract and Executive Act | ion History |
| | | |
| | Contract Tracking and Com | ments |
| | | |
| | ACKNOWLEDGE | DJUST CONTRACT ARCHIVE CONTRACT LOG CANCEL |

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

Section 2: Homepage - My Dashboard Details Screen – My Contracts – Executed Collapsed



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.



My Contracts – Executed Details Screen Expanded

| ishboard | Contract Id: 11596 | ADJUS | T CONTRACT | DG CANCEL |
|---------------------|--|---|--------------------------------|------------|
| itarted | | | | |
| Allocation Received | C ontract Details | | | |
| Provider | General Information | | | |
| from Provider | Contract Title | EA # | Rev # | |
| red | UAT CMO AND CONTROLLERWARD HOME CHILDREN | FOR 5071-15 | 1 | |
| ł | Provider Name | Project # | Project De | escription |
| | WARD HOME FOR CHILDREN | UAT CONTROL | .#3 | |
| | Start Date | End Date | | |
| | 2/1/2016 | 4/30/2016 | | |
| | | | | |
| rtment by | Lontract Information | | | |
| ger | Contract Type (required) | Mod # | Contract | # |
| | Original | | 988 | |
| | | | | |
| | Initial Allocation Amount \$50,000.00 | Current Alloca \$50,000.00 | ation Amount | |
| | Contract Phase Tracking | | | |
| | Contract Phase 1 Date Allocation Received St | nt to Provider 02/01/2012 | | |
| | Contract Phase 1 Date Allocation Received Second Se | | | |
| | Contract Phase 1 Date Allocation Received Se 01/01/2012 Contract Phase 2 | | Budget Received | |
| | Contract Phase 1 Date Allocation Received Se 01/01/2012 Contract Phase 2 Received from Provider W | 32/01/2012 | Budget Received 02/02/2012 | |
| | Contract Phase 1 Date Allocation Received Se 01/01/2012 Contract Phase 2 Received from Provider W 02/02/2012 Date JDE Form Requested D | 02/01/2012 ork Statement Received | | |
| | Contract Phase 1 Date Allocation Received Se 01/01/2012 Contract Phase 2 Received from Provider W 02/02/2012 Date JDE Form Requested D | 02/01/2012 ork Statement Received 02/02/2012 ate JDE Form Received | 02/02/2012 Sent to Director | |
| | Contract Phase 1 Date Allocation Received Set 01/01/2012 Set Contract Phase 2 Set Received from Provider W 02/02/2012 Set Date JDE Form Requested D 02/02/2012 Set Received from Director Set | 02/01/2012 ork Statement Received 02/02/2012 ate JDE Form Received | 02/02/2012 Sent to Director | |
| | Contract Phase 1 Date Allocation Received Set 01/01/2012 Set Contract Phase 2 Set Received from Provider We 02/02/2012 Date JDE Form Requested D 02/02/2012 Set Set Received from Director 02/04/2012 Set | 02/01/2012 ork Statement Received 02/02/2012 ate JDE Form Received | 02/02/2012 Sent to Director | |
| | Contract Phase 1 Date Allocation Received Set 01/01/2012 Image: Set to Law Department | 02/01/2012 ork Statement Received 02/02/2012 ate JDE Form Received | 02/02/2012 Sent to Director | |
| | Contract Phase 1 Date Allocation Received Set 01/01/2012 Image: Contract Phase 2 Received from Provider W 02/02/2012 Image: Contract Phase 3 Date JDE Form Requested Image: Contract Phase 3 Sent to Law Department 03/10/2015 Contract Phase 4 Received from Law Department by | 02/01/2012 ork Statement Received 02/02/2012 ate JDE Form Received | 02/02/2012 Sent to Director | |



Contracts – Executed Details Screen Expanded cont'd

| Contract Status | | | | | Missing Docs | Reason | | | |
|------------------------|-------------------|------------|------------------|---------------------------|---|---------------------|------------------|----------------|---|
| Executed | | | | | to select multipl | | se hold the ctrl | key and select | |
| | | | | | to unselect value -Select- Missing JDE Missing Oth Missing Inse | Docs her Program | m D | nd select | |
| Summary | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | ÷ |
| | | | | CANCE | - | | | | |
| | | | | CANCE | | | | | |
| Contract H Seq # \$ | istory Type \$ | Rev # | Last U | ser 🔶 Am | ount 🗍 C | hange 🌲 | Update | Date | |
| 1 | Original | 0 | KDTEST KDTEST | \$50.0 | 000.00 | 0 | 3/10/2 | | lick he or Deta |
| First Prev | vious 1 | Next | Last | | | | | | |
| Executive A | Action fo | r this Cor | ntract | | | | | | |
| EA Number | r\$ Date | Created | Officeŧ | Title 🕴 | Amount | Date S | iubmitted 🌢 | Status∳ | |
| 5071-15 | 3/1 | 0/2015 | | UAT CMO ANE CONTROLLER | | 0 3/1 | 0/2015 | Approved | <u>Clic</u> <u>her</u> <u>for</u> Deta |
| | | Next | Last | | | | | | |
| First Prev | vious 1 | | | | | | | | |



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.

Section 2: Homepage - My Dashboard My Contracts – Executed Details Screen Expanded



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.



Received Contracts

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

| Received | <u>Contracts</u> | | |
|-----------------------------------|--|--|-------------------------|
| Below are list of C the title. | ontracts sent to you for review. You | could get to the details of the C | Contract by clicking on |
| | | | |
| | | | |
| <u>Contract Titl</u> | ed: UAT CMO AND CONTR | OLLERWARD HOME FO | <u>R CHILDREN</u> & |
| Contract Titl | ed: UAT CMO AND CONTR Provider: WARD HOME FOR CHILDREN | DLLERWARD HOME FO Cost / Revenue: \$50000 | R CHILDREN & |
| Contract #: | Provider: WARD HOME FOR | | |

Title: Get to the details by clicking on the title or the 4 [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.

Section 2: Homepage - My Dashboard Details Screen – Received Contracts Collapsed



Details Screen – Received Contracts Collapsed

| Bac | k to Dashboard | Contract ld: 11519 | | ADJUST CONTRACT | CONTRACT LOG | CANCEL |
|------------|---|---------------------------------|-----------------|---|-------------------------|--------|
| Ç | Not Started | | | | | |
| ¢ | Date Allocation Received | Contract Details | | | | |
| ¢ | Sent to Provider | 触 General Information | | | | |
| ¢ | Received from Provider | • | | | | |
| Ŷ | Work Statement Received | | | | | |
| Ç | Budget Received | Contract Information | | | | |
| Q | Date JDE Form Requested | | | | | |
| Ŷ | Date JDE Form Received | 1 Contract Phase Trackin | a | | | |
| Y | Sent to Director | | g | | | |
| Y | Received from Director | | | | | |
| Y | Sent to Law Department | Contract Status Executed | | Missing Docs Reason to select multiple values please h | old the ctrl key and se | ect |
| Ŷ | Received from Law Department by County Manager | Executed | | to unselect values please hold the | | |
| \bigcirc | Signed by County Manager | | | -Select- Missing JDE Docs | ^ | |
| ¢ | Sent to Controller | | | Missing Other Program D Missing Insurance Docs | \sim | |
| ¢ | Received at Controller | Summary | | | | |
| | Execution Date | | | | | |
| | | eqwrwerwe | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | P |
| | | | | | | 6 |
| | | | CAN | CEL | | |
| | | | | | | |
| | | Contract and Executive | Action History | | | |
| | | • | | | | |
| | | | | | | |
| | | Contract Tracking and | Comments | | | |
| | | ACKNOWLEDGE | ADJUST CONTRACT | ARCHIVE CONTRACT LOG | CANCEL | |



Section 2: Homepage - My Dashboard Details Screen – Received Contracts Collapsed



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.

Section 2: Homepage - My Dashboard Received Contracts Details Page Expanded



Received Contracts Details Page Expanded

| ck to Dashboard | Contract Id: 11596 | ADJUST CO | NTRACT CONTRACT LOG CANCEL |
|--|--|------------------------------|--------------------------------|
| Not Started | | | |
| Date Allocation Received | Contract Details | | |
| Sent to Provider | General Information | | |
| Received from Provider | • | | |
| Work Statement Received | Contract Title UAT CMO AND CONTROLLERWARD HOME FOR | EA # 5071-15 | Rev # 1 |
| Budget Received | CHILDREN | | |
| Date JDE Form Requested | Provider Name WARD HOME FOR CHILDREN | Project # UAT CONTROL#3 | Project Description |
| Date JDE Form Received | | End Date | |
| Sent to Director | Start Date 2/1/2016 | 4/30/2016 | |
| Received from Director | | | |
| Sent to Law Department Received from Law Department by | | | |
| County Manager | Contract Information | | |
| Signed by County Manager | Contract Type (required) Original | Mod # | Contract # |
| Sent to Controller | Original | | 300 |
| | | to Provider 01/2012 | |
| | | | |
| | Contract Phase 2 | | |
| | Received from Provider Work | Statement Received | Budget Received 02/02/2012 |
| | Received from Provider Work 02/02/2012 02/0 Date JDE Form Requested Date J | | |
| | Received from Provider Work 02/02/2012 02/0 Date JDE Form Requested Date J | 02/2012 JDE Form Received | 02/02/2012 Sent to Director |
| | Received from Provider Work 02/02/2012 02/0 Date JDE Form Requested Date J 02/02/2012 02/0 Received from Director 02/04/2012 | 02/2012 JDE Form Received | 02/02/2012 Sent to Director |
| | Received from Provider Work 02/02/2012 02/0 Date JDE Form Requested Date J 02/02/2012 02/0 Received from Director 02/04/2012 | 02/2012 JDE Form Received | 02/02/2012 Sent to Director |
| | Received from Provider Work 02/02/2012 02/0 Date JDE Form Requested Date J 02/02/2012 02/0 Received from Director 02/04/2012 Contract Phase 3 Sent to Law Department | 02/2012 JDE Form Received | 02/02/2012 Sent to Director |



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Received Contracts Details Page Expanded cont'd

| Contract Stat Executed | us | | | Reason le values please hold the ctri les please hold the crti key al | | |
|---------------------------|----------------------|--------------------------------|---------------------------------------|---|--|------|
| | | | -Select- Missing JDI Missing Ot | - | | |
| iummary | | | | | | |
| | | | | | | |
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| | | | | | | |
| | | | | | م م | |
| | | | CANCEL | | | |
| Contra | act and Every | Itivo Action Llists | 24 | | | |
| - Contra | act and EXect | utive Action Histo | ту | | | |
| Contract H | listory | | | | | |
| Seq # 👙 | Type 🌲 🛛 Re | w# ≑ Last User | ♣ Amount ♣ C | hange 🗍 Update 🛛 | Date < 🌲 | |
| 1 | Original | 0 KDTEST21 KDTEST21 | \$50,000.00 | 0 3/10/20 | 15 <u>Click here</u> for Details | |
| First Pre | evious 1 N | ext Last | | | | |
| Executive | Action for thi | s Contract | | | | |
| EA Numbe | er 🗘 🛛 Date Crea | ited 🗍 Office | Title Amount | Date Submitted 🕏 | Status∳ ∳ | |
| 5071-15 | 3/10/201 | 15 Human UA1 Service(s) COI | | 3/10/2015 | Approved Click here for Details | |
| First Pre | evious 1 N | ext Last | | | | |
| | | | | | | |
| Contr | ract Tracking | and Comments | | | | |
| Contrac Commen | t Tracking It Log | | | | | |
| | Responsible F | Party 🔶 | Comments | 🔶 🛛 Made By | ♦ Date | otes |
| First P | revious Next | Last | | | | |
| | | Send Er | nail 🗖 | | | |
| Responsibl | | • | | | | |



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.

Exercise 1

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:

| Select Department (required) | | |
|---------------------------------------|------------|------|
| Human Service(s) | • | |
| Select Office | | |
| to select multiple values please hold | | |
| the ctrl key and select | | |
| -Select- | - | |
| Aging Behavioral Health | | |
| Office of Community Services | * 1 | |
| | | Cave |
| | | Save |
| | | |

- 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.

| -Select- | | |
|-----------|-------------------|--|
| -Select- | | |
| New Gra | nt | |
| Renewe | | |
| GRevision | to Existing Grant | |

- ≻New Grant
- ➤Renewed Grant
- ➤Revision to Existing Grant
- 4. Grant#: If given by Grantor, enter Grant number.

| Grant # | |
|---------|--|
| | |
| | |
| | |

5. Grant Title: Choose unique Grant Title

| | Grant Title (required) |
|------|------------------------|
| BEST | |
| | |

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:

| Crant Title Annual | | By Department: Prepopulated |
|--|------------------|---|
| Add Grantors By Department: Human Service(s) | × | ✓ If box is selected, grantors which have been used previously will display. |
| Select Grantor (required) -Select- 1 2 Start Date (required) End Date (required) | cii car em | ✓ Uncheck box to display all grantors. ✓ Select grantor from dropdown box. ✓ Enter the following information: Start Date: Type in the date [mm/dd/yyyy] or chose the calendar. End Date: Type in the date [mm/dd/yyyy] or chose the calendar. ✓ Need Contract? Yes or No |
| 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." | | <pre>must be selected.</pre> |



Create Grant cont'd

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

| | | Grantor 🛓 | Start Date 🖨 | End Date | Amount | Need Contract? | |
|--------------|-------|-------------------------------------|--------------|-----------|------------|----------------|-------|
| Select Row > | 0 | ALLEGHENY COUNTY CHIEF EXECUTIVE | 3/1/2015 | 3/31/2015 | \$1,000.00 | Yes | inte |
| | First | t Previous <mark>1</mark> Next Last | | E | dit | EDIT DELETE | Delet |

- **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
 - \square Funds must be deposited in interest bearing account
 - \square 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:

| | Add Providers | | × | t |
|------------------|--|---------------------------------|----------------------|-----------|
| | 🗹 By Department: Human | Service(s) | | se le |
| | Select Provider (required) | | | ŀ |
| | -Select- | • | | |
| | Project Number 1 | Agreement Number | 2 | ? |
| | Project Description | 3 | | |
| | Start Date (re 4 | 5 End Date (required) | | :ti ie |
| | Fee? (required) ^C Yes ^C No | | | |
| | Need Contract? (required) C | Yes ^C No | 6 | |
| Create Grant cor | Previous Amount(\$) | Change Amount(\$) (requir \$ | ed) Total Amount(\$) | |
| | | | CANCEL SAVE | - |



- **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:

- 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? 崇 |
|-----------------------|-------------|------------|------------|------------|-------|------------------|
| 2.21.15 TEST PROVIDER | | 3/1/2015 | 3/31/2015 | \$1,000.00 | No | No |
| First Previous 1 Nex | t Last | | | | | EDIT DELETE |

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 (required) | End Date (required) |
|----------------------------|---------------------|
| | |
| | |

- **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



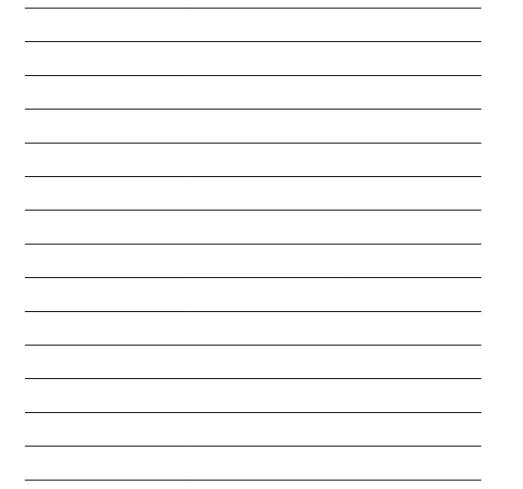


11. Click **Save** and Grant Details page will display

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.





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:

| × _ | |
|-----|------|
| | |
| | |
| | |
| | |
| × | Save |
| | Sav |
| | - |

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

| | - 11 | Department \$ | Office \$ | Approving Deputy | Approving Director 👙 |
|------------|------|------------------|------------------------------|---------------------|----------------------|
| | | Human Service(s) | Aging | KDTEST101 KDTEST101 | KDTEST100 KDTEST100 |
| Coloct Dow | | Human Service(s) | Behavioral Health | KDTEST102 KDTEST102 | KDTEST100 KDTEST100 |
| Select Row | | Human Service(s) | Office of Community Services | KDTEST110 KDTEST110 | KDTEST100 KDTEST100 |
| | | First Previous 1 | Next Last | | DELETE |

- ✓ 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"."

🗖 Grant 🗖 Capital 🗖 Operating 🗖 Special Revenue 🗖 Trust & Agency

| iture Impact | | |
|--------------|--|--|
| | | |
| | | |

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

| Add Codes | × | Add Codes | × | |
|---|------|--|--------|------|
| Select Code Type (required) -Select Code (required) 2 | | Select Code Type (required) -Select Cost Center Job Code Object Code | | Save |
| CANCEL | SAVE | | CANCEL | 50 |

- 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:

| Select Row | | Code Type 🛛 🗍 | Code \$ | alete |
|------------|-------------|-----------------|------------------|-------|
| | First Previ | ous 1 Next Last | Edit EDIT DELETE | De |

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.)

| Add Providers | | |
|--|---|------------------|
| 🗹 By Department: Huma | an Service(s) | |
| Select Provider (required) | | |
| -Select- | • | |
| Project Number | Agreement Number 2 | |
| Project Description | 3 | |
| Start Date (re 4 | 5 End Date (required) | |
| Fee? (required) ^C Yes ^C N Need Contract? (required) | < New | |
| Previous Amount(\$) | Change Amount(\$) (required) | Total Amount(\$) |
| | \$ | |
| | | |

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:
 - Change Amount(\$): Enter amount (not exceed amount of contract)
 - ✓ Click **Save** and providers will display as follows:

| | Provider | ¢ | Project #\$ | Start Date | End Date 븆 | Amount‡ | Fee?≑ | Need Contract? 崇 |
|---------|---------------|-----|-------------|------------|------------|------------|-------|------------------|
| C 2.21. | 15 TEST PROVI | DER | | 3/1/2015 | 3/31/2015 | \$1,000.00 | No | No |
| First | Previous 1 | Nex | t Last | | | | | |
| | | | | | | | | EDIT DELETE |

14. Click on 🕂 to Add Attachment and the following screen will display.

| Add Attachment | |
|---|--|
| Select Attachment Type (required) | |
| -Select- | |
| | |
| | |
| Browse for Attachment (required) | |
| Browse for Attachment (required) BROWSE | |
| | |

- 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

4

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"> Ny 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.
- 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.

| rantor / Provider: Varia | es by County Department |
|--------------------------|---|
| Contract Type (required) | |
| | |
| | |
| Modification | |
| Original | |
| | Contract Type (required) -Select- Amendment Modification |

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.
- 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.

4

Create a Contract cont'd

| Contract Id: 11602 | | ADJUST CONTRACT | CONTRACT LOG | CANCEL |
|--|---|---|--|---|
| | | | | |
| Contract Details | | | | |
| General Information | | | | |
| • | FA # | | Dave # | |
| Dept of Human Services / Grant Award-ADVISOR | | 15 | 1 | |
| | | | | |
| | | ct # | Project Descri | ption |
| Start Date | End D | ate | | |
| 4/1/2015 | 3/31/2 | 2016 | | |
| | | | | |
| Contract Information | | | | |
| Contract Type (required) | Mod # | # | Contract # | |
| Original | | | 15223 | |
| Initial Allocation Amount | | | | |
| \$250,000.00 | \$200,0 | 00.00 | | |
| • | | | | |
| Contract Phase Tracking | | | | |
| Contract Phase 1 | | | | |
| | | | | |
| 03/18/23/13 | a/2015 | | | |
| Contract Phase 2 | | | | |
| | | | | |
| 03/18/2015 03/18 | 8/2015 | 03/1 | 0/2015 | |
| | | | | |
| | | | | |
| 03/18/2015 | | | | |
| Contract Phase 3 | | | | |
| Sent to Law Department | | | | |
| 03/18/2015 | | | | |
| Contract Phase 4 | | | | |
| | d by County Manage | er Sentt | o Controller | |
| County Manager 03/1 03/18/2015 | 8/2015 | 03/1 | 8/2015 | |
| | | | | |
| Contract Phase 5 | | | | |
| Received at Controller | | | | |
| 0.010/2015 | | | | |
| Contract Phase 6 | | | | |
| Execution Date | | | | |
| 03/18/2015 | | | | |
| | | | | |
| Contract Status | Missi | ng Docs Reason | | |
| Executed | | ect multiple values please i select values please hold th | | elect |
| | | | * | |
| | Mis | sing Other Program | D | |
| | Mis | ssing Other Program I ssing Insurance Docs ssing Workstatement | D | |
| Summary | Mis | ssing Other Program | D | |
| Summary | Mis Mis | ssing Other Program ssing Insurance Docs ssing Workstatement | D [| |
| | Mis Mis | ssing Other Program ssing Insurance Docs ssing Workstatement | D [| |
| Summary | Mis Mis | ssing Other Program ssing Insurance Docs ssing Workstatement | D [| |
| | Contract Details Contract Information Contract Title Dept of Human Services / Grant Award ADVISOR ON AUTISM AND RELATED DISORDERS Provider Name ADVISORY BOARD ON AUTISM AND RELATED DIS Start Date 4/1/2015 Contract Information Contract Type (request) Original Initial Allocation Amount 5250.000.00 Contract Phase 1 Date Allocation Received G3/18/2015 Contract Phase 2 Received from Provider G3/18/2015 Contract Phase 3 Sent to Law Department G3/18/2015 Contract Phase 4 Received from Law Department by G3/18/2015 Contract Phase 4 Received from Law Department by G3/18/2015 Contract Phase 5 Received a Controller G3/18/2015 Contract Phase 5 Received a Controller G3/18/2015 Contract Phase 6 Evecution Date | Contract Details Contract Information Contract Title Dept of Human Services / Grant Award-ADVISORY BOARD ON AUTISM AND RELATED DISORDERS Provider Name ADVISORY BOARD ON AUTISM AND RELATED DISORDERS Start Date Contract Information Contract Information Contract Information Contract Phase Contract Phase I Date Allocation Amount S250,000,00 Contract Phase 1 Date Allocation Received O3/18/2015 Contract Phase 2 Received from Provider O3/18/2015 Date JDE Form Requested O3/18/2015 Date JDE Form Requested O3/18/2015 Contract Phase 3 Sent to Law Department D3/18/2015 Contract Phase 4 Received from Law Department by Contract Phase 5 Received at Controller O3/18/2015 Contract Phase 6 Execution Date | Contract Details Contract Details Contract Title Dept of Human Services / Grant Award ADVISORY BOARD ON AUTISM AND RELATED DISORDERS Provider Name ADVISORY BOARD ON AUTISM AND RELATED DISORDERS Start Date 4/1/2015 Start Date 4/1/2015 Contract Information Contract Type: received Contract Phase 1 Date Allocation Received B3/18/2015 Contract Phase 1 Date Allocation Received B3/18/2015 Contract Phase 2 Received from Director B3/18/2015 Contract Phase 3 Sent to Law Department Contract Phase 3 Sent to Law Department Contract Phase 3 Sent to Law Department Contract Phase 5 Received a Controller B3/18/2015 Contract Phase 5 Received a Controller B3/18/2015 Contract Phase 5 Received a Controller B3/18/2015 Contract Phase 6 Evecution Date | Contract Details Contract Details Contract Title General Information Contract Title Dept of Human Services / Grant Awards ADVISORY BOARD SOR9-15 1 Project Descri ADVISORY BOARD ON AUTISM AND RELATED DISORDERS Sert Date Find Date AT/2015 Contract Information Contract Type registes Contract Information Contract Type registes Contract Information Contract Phase Tracking Contract Phase 1 Date Micration Contract Phase 1 Date Disord Sub2015 Contract Phase 2 Received from Provider BY18/2015 Date DF Form Requested Date (DF Form Received BY18/2015 Contract Phase 3 Sert to Law Department BY18/2015 Contract Phase 5 Received at Controller BY18/2015 Contract Phase 5 Received at Controller BY18/2015 Contract Phase 5 Received at Controller BY18/2015 Contract Phase 6 Evection Date |

Create a Contract cont'd

CONTRACT DETAILS SCREEN Cont'd

| 🔖 Cont | tract and Ex | ecutive A | ction His | story | | | | | |
|-----------|--------------|-----------|--|--|---------------|----------|------------|----------|---|
| Contract | History | | | | | | | | |
| Seq # \$ | Туре 👙 | Rev # ≑ | | | Amount 👙 | Change 👙 | | | ÷ |
| 1 | Original | 0 | KDTES KDTES | | \$250,000.00 | 0 | 3/18/ | 2015 | <u>Click here</u> <u>for</u> <u>Details</u> |
| 2 | Adjustment | 0 | KDTES KDTES | · · · · · · · · · · · · · · · · · · · | 200,000.00 | -50000 | 3/18/ | 2015 | <u>Click here</u> for <u>Details</u> |
| First P | revious 1 | Next La | ast | | | | | | |
| Executive | Action for t | his Cont | ract | | | | | | |
| EA Numt | | | | | | | bmitted \$ | | ¢ |
| 5078-1 | 5 3/18/ | | Human Service(s) - Multiple Offices | Dept of Human Services / Grant Award | \$1,000,000.0 | 00 3/18/ | 2015 | Approved | <u>Click</u> <u>here for</u> <u>Details</u> |

Lontract Tracking and Comments

First Previous 1 Next Last

Contract Tracking

| From\$ | | То \$ | Department To | Date \$ | Changed By | Status | State 🔶 | Notes# |
|----------------------|----------------------------|----------------------|----------------------------|-----------------------------|------------|----------|-------------|--------|
| KDTEST9 KDTEST9 | Controller's Office | KDTEST9 KDTEST9 | Controller's Office | AM | KDTEST9 | Active | Updated | |
| KDTEST9 KDTEST9 | Controller's Office | KDTEST21 KDTEST21 | Human Service(s) | 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 F | Previous 1 2 | Next L | ast | | | | | |

Comment Log

| | Respo | nsible Pa | irty | ¢ | Comments | ¢ | Made By 🗍 | Da |
|-------|----------|-----------|------|---|----------|---|-----------|----|
| First | Previous | Next | Last | | | | | |

Responsible Party Send Email 🗌 ~

-Select-

Comments

 ACKNOWLEDGE
 ADJUST CONTRACT
 ARCHIVE
 CONTRACT LOG
 CANCEL

Exercise 2

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

| Search For Grants | | |
|---|--|-------------------------------|
| ? Information | | |
| appropriate criteria(s) and click on the "Search" but | I below. To locate the grant you are looking for select ton. If your search results in more than one Grant record you | |
| select additional criteria to further filter the results. | | Information |
| Grant Information | | |
| Department | Select Office | You can search for a grant |
| | to select multiple values please hold the ctrl key and select | using the criteria(s) listed |
| Human Service(s) | | below. |
| | | |
| Grant Title | Grant # | To locate the grant you are |
| | | looking for select appropria |
| Grant Modification # | Project # | criteria(s) and click on the |
| | | |
| Grantor | Provider | "Search" button. |
| -Select- | • -Select- | If your search results in mo |
| | | than one Grant record you |
| Grant Dates | | |
| Date Created Between Start Date | End Date | select additional criteria to |
| | | further filter the results. |
| Award/Allocation Received Date | | |
| Start Date | End Date | Buttons: (top/bottom scre |
| | | [Search] |
| Financial Information | | |
| | | [Clear Criteria] |
| Total Amount \$ | County Match § | [Cancel] |
| | | Grant Search Criteria |
| Submission Number Resolution Number | Bill Number | Department |
| | | Select Office |
| SEARCH | CLEAR CRITERIA CANCEL | 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. <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.

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."

| Mod #≑ | Date Created | | Title 🔶 | Amount \$ | County Match | Last User 👙 | |
|--------|--------------|------------------------------|--------------------------|-------------|--------------|----------------------|----------------------------------|
| 1 | 3/18/2015 | Human Service (s) - Aging | 2015 SDE Test Grant 3 | \$30,000.00 | | KDTEST21 KDTEST21 | <u>Click here</u> for Details |



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".



Search Grants for Copy

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

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

From "MY Dashboard"

Grant->Copy

| Search Grants for Copy | | |
|--|--|--|
| | s) listed below. To locate the grant you are looking for select n. If your search results in more than one Grant record you | Information |
| Grant Information | | |
| Department | Select Office to safect multiple values please hold the ctri key and select | You can search for a grant for copy using the criteria(s) list |
| Human Service(s) | - Select- | below. |
| Grant Title | Grant # | To locate the grant you are |
| Grant Modification # | Project # | looking for select appropriate criteria(s) and click on the |
| Grantor -Select- | Provider Select- | "Search" button. |
| Grant Dates | | If your search results in more |
| Date Created Between Start Date | End Date | than one Grant record you |
| | | select additional criteria to further filter the results. |
| Award/Allocation Received Date Start Date | End Date | |
| Financial Information | | Buttons: (top/bottom screen [Search] |
| Total Amount | County Match | [Clear Criteria] |
| \$ | 5 | [Cancel] |
| Submission Number Resolution Number | Bill Number | Grant Search Criteria |
| SEARCH CL | EAR CRITERIA CANCEL | 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:

| G | rant Se | earch Resu | ilts for Copy | / | | | |
|---|------------|--------------|-----------------------------|--------------------------|-------------|----------------|----------------------|
| | Mod # \$ | Date Created | Office 🔶 | Title 븆 | Amount \$ | County Match 🕏 | Last User |
| С | 1 | 3/18/2015 | Human Service(s) - Aging | 2015 SDE Test Grant 3 | \$30,000.00 | | KDTEST21 KDTEST21 |
| F | First Prev | ious 1 Next | Last | | | | |
| | | | | СОРҮ | | | |



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.



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

| Search Grants For Modific | ation | _ |
|---|--|--|
| Information You can search for a grant using the criteria(s) list appropriate criteria(s) and click on the "Search" bu select additional criteria to further filter the result | itton. If your search results in more than one Grant record you | |
| Grant Information | | Information You can search for a grant |
| Department | Select Office to select multiple values please hold the ctri key and select | using the criteria(s) listed |
| Human Service(s) | Select- | below. |
| Grant Title | Grant # | To locate the grant you are looking for select appropria |
| Grantor | Provider | criteria(s) and click on the |
| -Select- | -Select- | "Search" button. |
| Grant Dates | | - |
| Date Created Between Start Date | End Date | If your search results in mo than one Grant record you |
| Award/Allocation Received Date Start Date | End Date | select additional criteria to further filter the results. |
| | | |
| Financial Information | | Buttons: (top/bottom scre |
| Total Amount | County Match | [Search] |
| > Submission Number Resolution Number | 5 Bill Number | [Clear Criteria] |
| | | [Cancel] |
| SEARCH | CLEAR CRITERIA CANCEL | Grant Search Criteria |
| | | _ Department |
| | | Select Office |
| | | Grant Title |
| | | Grant# |
| | | |

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:

| Gr | ant Se | arch Resu | lts for Modifica | tion | | | |
|----|-----------|----------------|--|-------------------------------|--------------|--------------|----------------------|
| | Mod # ≑ | Date Created 崇 | Office 👙 | Title | Amount | County Match | Last User |
| С | 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 |
| Fi | rst Previ | ous 1 Next | Last | DIFY | | | |



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.



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 loeme the Executive Action you are | |
|--|--|--|
| looking for select appropriate criteria(s) and click on the "S Executive Action record you can select additional criteria t | search" button. If your search results in more than eve o further filter the results. | Information |
| Executive Action Information | Select Office | |
| Human Service(s) | to which multiple values please hold the ctrl key and select -Select- | You can search for an Executive Action using the |
| Executive Action Title | Executive Action # | criteria(s) listed below. |
| Contact Person -Select- | Project # | To locate the Executive Ac you are looking for select |
| Grantor -Select- | -Select- | appropriate criteria(s) and on the "Search" button. |
| Executive Action Dates Date Created Between Start Date Date Submitted Between Start Date | End Date | If your search results in me than one Executive Action record you can select addit |
| Other Information | | criteria to further filter the results. |
| Select- Select- Select- Select- Select- Select- SEARCH CLEAR | Sent to User Select- CRITERIA CANCEL | Buttons: (top/bottom scre [Search] [Clear Criteria] [Cancel] |
| | | Executive Action Search Criteria |
| | | Department Select Office |
| | | Executive Action Title Executive Action # |
| To conduct a search | | Contact Person |
| Entor information in | nto one or more fields or | r leave all fields blank. |



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. <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. **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

| EA #≑ | Date Created 崇 | Office | Title 븆 | Amount | Date Submitted | Status | |
|-------|----------------|-----------------------------|--------------------|------------|----------------|-----------|----------------------------------|
| | 3/18/2015 | Human Service(s) - Aging | 2015 SDE Test 5 | \$1,000.00 | 3/18/2015 | Submitted | <u>Click here for</u> Details |

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".



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

| one Executive Action record you can select additional criteria to further filter the results. Executive Action Information Department Select Office to when matrixe values alease held the ctrl key and whent | You can search for an |
|--|---|
| Human Service(s) -Select- | Executive Action for copy us the criteria(s) listed below. |
| Executive Action Title Executive Action # | you are looking for select appropriate criteria(s) and o on the "Search" button. |
| -Select Select Select. | If your search results in mo than one Executive Action record you can select additi criteria to further filter the results. |
| Start Date End Date Other Information Executive Action Status SelectSele | Buttons: (top/bottom scre [Search] [Clear Criteria] [Cancel] |
| Select- | Executive Action Search Criteria Department Select Office Executive Action Title Executive Action # Contact Person |



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. <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. **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

| Executi | ve Action | Search Res | sults | | | | | |
|-----------|--------------|------------------|-------------|------------|------|-------------|------------------|---------|
| EA # ≑ | Date Created | Office | \$ | | ¢ | Amount | Date Submitted 🕏 | |
| o | 3/18/2015 | Human Service(s) | - Aging 201 | 5 SDE Test | EA 3 | \$30,000.00 | 1/1/0001 | Pending |
| First Pro | evious 1 Ne | xt Last | C | ОРҮ | | | | |

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.
- 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.



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

| | Search Provider(s) for Modify | |
|--|---|---|
| the second s | Information You can search for a Contract to Modify/Amend using the crimetace listed below. To locate the Provider you are looking to modify select appropriate criterials) and click on the "Search" button. If your search regults more than one contract record you can select additional criteria to further filter the results. You can search for Provider[5] 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[5] click on "Create Executive Action. Atter: This search result wild diply/Provider[6] who have a contract record in the system. | Information |
| | Executive Action Information Department Select Office to solvert multiple values phase hold the strl key and select Human Service(s) | You can search for a Contract to Modify/Amend using the criteria(s) listed below. |
| | Executive Action Title Executive Action # | 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 |
| | Contract Title Contract # | than one contract record you can select additional criteria to further filter the results.You can search for Provider(s) listed within multiple Executive |
| | Buttons: (top/bottom screen) [Search] [Clear Criteria] [Cancel] | Action and click on "Select" to add it to the Select Provider List. Once you have added all the |
| | Executive Action Search Criteria Department Select Office Executive Action Title Executive Action # Contact Person Project # Provider Contract Title Contract # | 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. |



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. <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. **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."

| ŀ | Provide | e <mark>r S</mark> earch R | esults | | | | |
|-----|-----------|----------------------------|---------------------------------------|-----------|--------|------------|-----------|
| l | 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 |
| | First Pre | evious 1 Next | Last | | | | |
| | | | SELECT | - | | | |
| ١., | | | | | | | |

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:

| Sele | cted Providers | | | | |
|-------|-----------------|-----------|---------------------|------------|-----------|
| * | Provider Name | Project # | + Amount | Start Date | End Date |
| | AHEDD | | 32231 | 3/9/2015 | 3/31/2015 |
| First | Previous 1 Next | Last | | | |
| | | CRE | ATE EXECUTIVE ACTIO | DN | |

- 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".



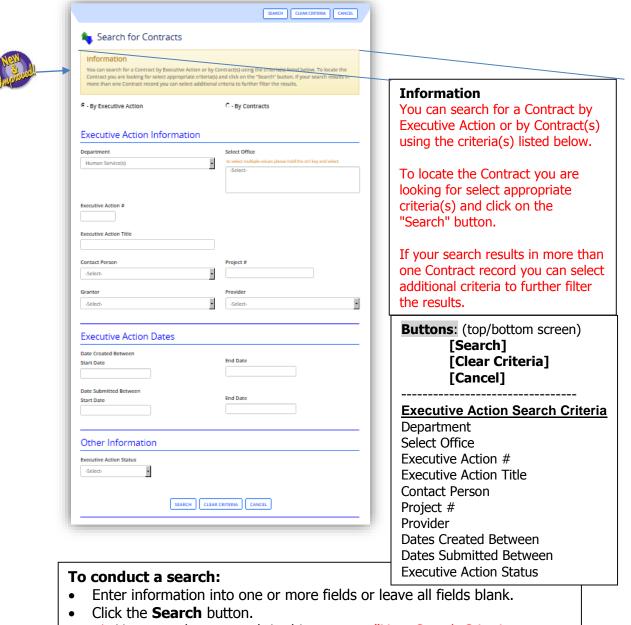
Search for Contracts by Executive Action

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:



✓ 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:

| | Search for Contracts | SPARCH CLEAR CHITTERIA CANCEL | |
|----------------------|--|---|---|
| | | n or by Contract(s) using the criteria(s) ISIRB below. To locate the riteria(s) and click on the "Search" button. If your search results in didtional criteria to further filter the results. Contract Title End Date Contract Type Select. | 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 |
| | Sent to User Select- | Sent from User Select- | the results. Buttons: (top/bottom screen) [Search] [Clear Criteria] [Cancel] |
| Ent all Clic | fields blank. It the Search button Your search may re Search Criteria retu | sult in this message "Your rns more than 60 rows, al search criteria to narrow | Executive Action Search CriteriaContract NumberContract TitleProject NumberMod #Contract Term: start/end datesGrantor AmountContract TypeGrantorProviderSent to UserSent from User |

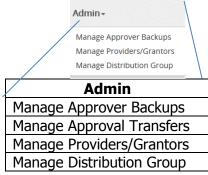
6

Section 6: Administrator Functions

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

| | | | | | | | 0 | DHS APPLICATIO | INS - COUNTY RESOURCE GUIDE |
|--------|-------------------|-----------|----------|-------------------|------|----------|-----|----------------|--------------------------------|
| Grant- | Executive Action+ | Contract+ | Reports- | Admin- | | | | | |
| | | | Welcome | KDTEST49 KDTEST49 | Home | Alerts 👩 | FAO | LOG OUT | Session will timeout in: 59:22 |

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





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. <u>All Executive Action</u> <u>approvals for a department will be based on the information configured in this screen</u>. 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."

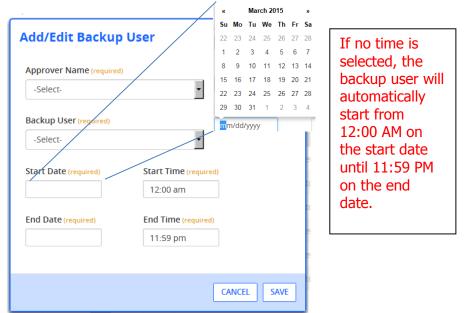
If no time is selected, the backup will automatically start from 12:00 AM on the start date until 11:59 PM on the end date.

| T I I I I I I I I | emove backup users h this screen. Backup ime. | a All Executive Actions will be in effective actions will be in effective actions will be in effective actions and actions action action actions actions action action action actions actions action a | on approvals for a fect from the star | lirector(s)/Director for a department will be b t date and time set in rom 12.00 AM on the s | ased on the informa this screen until the | tion configured end date and |
|---|---|--|---|---|---|---|
| v | P Information When refreshing the lepartment selected. | Department, the ba | ackup user list wil | ll refresh as well, and t | will display the users | ; for the |
| | | | | | | |
| The | artment uman Service(s) table below list all ti iove existing backup ADD BACKUP USE | users. | r approvers confi | REFRESH gured in the system, y | you can add new/edi | t existing backup |
| The | uman Service(s) table below list all t iove existing backup | users. | r approvers confi | | iou can add new/edi Start Date Time | t existing backup End Date Time |
| The | uman Service(s) table below list all ti love existing backup ADD BACKUP USE Approver Name KDTEST100 | Approver Role) | Backup User) KDTEST4 | gured in the system, y | Start Date Time) 3/3/2015 12:00:00 | End Date Time 3/3/2015 11:59:0 |
| H The ren | uman Service(s) table below list all ti nove existing backup ADD BACKUP USE Approver Name KDTEST100 KDTEST100 KDTEST110 | Approver Rold | Backup User) KDTEST4 KDTEST4 KDTEST182 | gured in the system, y Backup User Rold | Start Date Time 3/3/2015 12:00:00 AM 2/25/2015 2:48:00 | End Date Time 3/3/2015 11:59:0 PM 2/25/2015 |
| H The ren | uman Service(s) table below list all ti eve existing backup ADD BACKUP USI Approver Mamel KDTEST100 KDTEST100 KDTEST110 KDTEST110 | Approver Role Department Director | Backup User KDTEST4 KDTEST4 KDTEST182 KDTEST182 KDTEST121 | gured in the system, y Backup User Rolé Department Viewer | Start Date Time 3/3/2015 12:00:00 AM 2/25/2015 2:48:00 PM 2/27/2015 12:00:00 | End Date Time 3/3/2015 11:59:0 PM 2/25/2015 11:59:00 PM 2/27/2015 |
| H The ren + | uman Service(s) table below list all it we existing backup ADD BACKUP USI Approver Name KDTEST100 KDTEST100 KDTEST110 KDTEST110 KDTEST128 KDTEST128 | Approver Role) Department Director Deputy Director | Backup User KDTEST4 KDTEST4 KDTEST182 KDTEST121 KDTEST121 KDTEST4 | Backup User Rolé Department Viewer Deputy Director | Slart Date Time 3/3/2015 12:00:00 AM 2/25/2015 2:48:00 PM | End Date Time 3/3/2015 11:59:0 PM 2/25/2015 11:59:00 PM 2/27/2015 11:59:00 PM |
| H The ren C | uman Service(s) table below list all ti loove existing backup ADD BACKUP USI Approver Name KDTEST100 KDTEST100 KDTEST110 KDTEST110 KDTEST128 | Approver Role Department Director Deputy Director | Backup User KDTEST4 KDTEST4 KDTEST182 KDTEST182 KDTEST121 KDTEST121 | Backup User Rold Department Viewer Deputy Director Deputy Director | Start Date Time) 3/3/2015 12:00:00 AM 2/25/2015 2:48:00 PM 2/27/2015 12:00:00 AM 3/3/2015 12:00:00 | End Date Time 3/3/2015 11:59:0 PM 2/25/2015 11:59:00 PM 2/27/2015 11:59:00 PM 3/3/2015 11:59:0 PM |

To add backup Approver:

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

Manage Approver Backups cont'd



- 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 USE | R | | | | |
|----|------------------------|-------------------------|------------------------|-------------------|--------------------------|--------------------------|
| | Approver Name | Approver Role | Backup User∳ | Backup User Role | Start Date Time | End Date Time |
| c | KDTEST100 KDTEST100 | Department Director | KDTEST4 KDTEST4 | Department Viewer | 3/3/2015 12:00:00 AM | 3/3/2015 11:59:00 PM |
| c | KDTEST110 KDTEST110 | Deputy Director | KDTEST182 KDTEST182 | Deputy Director | 2/25/2015 2:48:00 PM | 2/25/2015 11:59:00 PM |
| c | KDTEST128 KDTEST128 | Deputy Director | KDTEST121 KDTEST121 | Deputy Director | 2/27/2015 12:00:00 AM | 2/27/2015 11:59:00 PM |
| c | KDTEST128 KDTEST128 | Deputy Director | KDTEST4 KDTEST4 | Department Viewer | 3/3/2015 12:00:00 AM | 3/3/2015 11:59:00 PM |
| c | KDTEST169 KDTEST169 | Department Viewer | KDTEST4 KDTEST4 | Department Viewer | 3/3/2015 12:00:00 AM | 3/3/2015 11:59:00 PM |
| c | KDTEST6 KDTEST6 | DHS Executive Deputy | KDTEST121 KDTEST121 | Deputy Director | 2/25/2015 12:00:00 AM | 2/25/2015 11:59:00 PM |
| Fi | irst Previous 1 | Next Last | | | | |
| | | | | | ſ | EDIT DELETE |

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



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.

| nt 🗍 Date Submitted 🗍 Statu: |
|------------------------------|
| |
| |
| |

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.

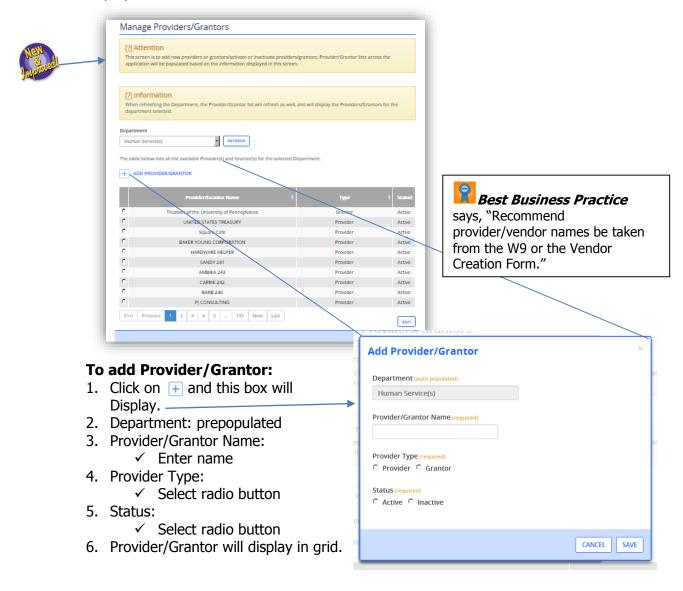
8. As a reminder, you must also end date the current approver, and add the new approver on the Manage Approver Back up screen

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.





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</u> <u>Contract notification will be based on the information configured in this screen.</u>

Section 1: Distribution Groups

| This | | | ve users to distribution groups. Any Executh on the information configured in this screen |
|--|---|---|---|
| Distr | ibution Groups | | |
| Whe | Information n refreshing the Depar up for the department s | | efresh as well, and will display the Distributi |
| Depart | ment | | |
| Hum | an Service(s) | • REFRESH | |
| The tab groups | | lable distribution groups in the system | i, you can add new groups or remove existin |
| Broups | | | |
| + / | ADD DISTRIBUTION GR | DUP | |
| | Group Id 🕴 | Group Name 🛛 🕴 | Type Of Group |
| e | 8 | County Manager Off | EA Submission |
| | | | |
| C . | 11 | Law | LAW GROUP |
| c c | 11 | Law Controller Group | LAW GROUP CONTROLLER GROUP |
| c c | | | |
| C C C | 12 | Controller Group County Manager | CONTROLLER GROUP |
| C C First | 12 14 | Controller Group | CONTROLLER GROUP |
| C C First | 12 | Controller Group County Manager | CONTROLLER GROUP |
| C C First | 12 | Controller Group County Manager | CONTROLLER GROUP |
| C C First | 12 | Controller Group County Manager | CONTROLLER GROUP |
| C C First | 12 | Controller Group County Manager | CONTROLLER GROUP |
| | 12 14 Previous 1 Ne | Controller Group County Manager nt Last | CONTROLLER GROUP |
| | 12 | Controller Group County Manager nt Last | CONTROLLER GROUP |
| Distri The set | 12 14 Previous 1 Ne buttion Group - U: | Controller Group County Manager tt Last sers the user(s) who will be part of the selec | CONTROLLER GROUP |
| Distri The set you cal | 12 14 Previous 1 Ne bution Group - Ur clion below displays all | Controller Group County Manager tt Last sers the user(s) who will be part of the selec | CONTROLLER GROUP COUNTY MANAGER GROUP Tort |
| Distri The set you can Note: 0 | 12 14 Previous 1 Ne ibution Group - U: ttion below displays all | Controller Group County Manager at Last sers the usar(t) who will be part of the selec ing delete button. | CONTROLLER GROUP COUNTY MANAGER GROUP Tort |
| Distri The set you can Note: 0 | 12 14 Previous 1 Ne bution Group - Ur clion below displays all | Controller Group County Manager at Last sers the usar(t) who will be part of the selec ing delete button. | CONTROLLER GROUP COUNTY MANAGER GROUP Tort |
| Distri The set you can Note: 0 | 12 14 Previous 1 Ne buttion Group - U, ttion below displays all remove users by disk huttor huttor buttor huttor buttor huttor | Controller Group County Manager ot Last See S If device button. If device button. | CONTROLLER GROUP COUNTY MANAGER GROUP corr ted group. You can add new users by clickin of |
| Distri The set you can <i>Note:</i> (| 12 14 Previous 1 Ne button Group - U. tion below displays all remove users by disk humo disk button in ADD USERS TO THE GRO | Controller Group County Manager ti Last SET S SET S the user(s) who will be part of the soles ing delete user no longer needs to be notifie DUP Group | CONTROLLER GROUP COUNTY MANAGER GROUP corr ted group. You can add new users by cilckin of Department & Ar |
| Distri The set you can <i>Note: (</i> | 12 14 Previous 1 Ne button Group - U: ston below displays all remove users by click halv use dolete button i budo USERS TO THE GRO Manne KDTESTS1 KDTE | Controller Group County Manager County Manager Sers the user(s) who will be part of the selen ing delete button. the user no longer needs to be notifie UVP County Manager D County Manager D County Manager D County Manager D | CONTROLLER GROUP COUNTY MANAGER GROUP COT ted group. You can add new users by clickin of Department 4 Au Human Service(s) 1 |
| Distri The set you can <i>Note: (</i> | 12 14 Previous 1 Ne button Group - U. tion below displays all remove users by disk humo disk button in ADD USERS TO THE GRO | Controller Group County Manager Last SerS the user(s) who will be part of the selen ing delete button. the user no longer needs to be notific SUP County Manager O ST51 County Manager O ST245 County Manager O | CONTROLLER GROUP COUNTY MANAGER GROUP FOR Total group. You can add new users by clickin of Department () Manan Service(c) () Manan Service(c) () |

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

| Group Id (auto generated) | | | |
|---------------------------|---|---|--|
| Crown Name of a | | | |
| Group Name (required) | | | |
| Group Type (required) | | | |
| -Select- | • | | |
| | | , | |

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

| G | Group Type (required) | | |
|---|-----------------------|--|--|
| | -Select- | | |
| ٦ | -Select- | | |
| | EA Approval | | |
| | EA Submission | | |
| | Contracts Execution | | |
| | LAW GROUP | | |
| | CONTROLLER GROUP | | |
| | COUNTY MANAGER GROUP | | |

- > 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 | |
|----------------------------|--------------|--------------------|----------------------|--|
| 6 | 12 | Controller Group | CONTROLLER GROUP | |
| С | 14 | County Manager | COUNTY MANAGER GROUP | |
| C | 8 | County Manager Off | EA Submission | |
| С | 11 | Law | LAW GROUP | |
| First Previous 1 Next Last | | | | |
| | | | EDIT | |

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



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:

| roup Name (auto populated) | | |
|-----------------------------|---|--|
| County Manager Off | | |
| epartment (required) | | |
| Human Service(s) | • | |
| -Select- | | |
| -Select- | | |
| ctive (required) C Yes C No | | |
| | | |

- 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:

| you can <i>Note: O</i> | ion below displays all the user(s) wh remove users by clicking delete but nly use delete button if the user no in DD USERS TO THE GROUP | ton. | ıp. You can add new users | by clicking (+) or |
|---------------------------|--|-------------------------------|---------------------------|----------------------|
| | | | | |
| | Name 🔶 | Group 🔶 | Department | Active 🗍 |
| с | Name \blacklozenge KDTEST51 KDTEST51 | Group 🔶 County Manager Off | Department + | Active \Rightarrow |
| c c | | | | |

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

6

Section 7: Knowledge Check

Section 7: Knowledge Check



7

Appendix 1: Roles

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

<u>**Creator**</u> – 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

Appendix 2: Resources

County Resources

| | | Administrative Assistant izzard@alleghenycounty.us | Department of Budget and Finance 412-350-5788 | | | |
|--|--|--|---|--|--|--|
| | , | Director of Budget & Finance proka@alleghenycounty.us | 412-350-7372 | | | |
| | Department of Human Services Resources | | | | | |
| | Kathy Heinz | Contracts Unit Manager @alleghenycounty.us | Department of Human Services 412-350-5480 | | | |
| | Stacey Tunie stacey. | Performance Improvement Ana tunie@alleghenycounty.us | lyst Education/Training & Organizational Dev. 412-350-4547 | | | |
| | JW Wallace JW.Wa | - | ng & Organizational Development 412-350-3689 | | | |
| Education/Training & Organizational Development Email address: <u>DHS-ETOD@alleghenycounty.us</u> | | | | | | |
| | Service Desk | | | | | |

Phone: 412-350-4357 Email address: <u>servicedesk@alleghenycounty.us</u>

Thank You

