



GM 101

Introduction to Grantor



Foreign Agricultural Service

Version 1



Agenda



- **Course Introduction**
- Module 1 – Grantor Overview
- Module 2 – eAuth and Roles in Grantor
- Module 3 – Basic Navigation
- Course Summary and Evaluation



Instructor Introductions



- Ann Knapp
 - Grantor Training Facilitator

- Chris Coppenbarger
 - Agency Grants Management Officer
 - Grants & Agreements Subject Matter Expert (SME)





Logistics



- Health and Safety First
- Facilities
- Cellular Phones and PDAs
- Breaks





Course Structure, Format, and Materials



- **Course Structure:**
 - Modules
 - Course Evaluation (link to survey provided via email)

- **Course Format:**
 - Instructor-led training (ILT) – Training facilitated by an Instructor

- **Course Materials:**
 - Will be located on FAS SharePoint site under the “OCOO” tab
 - There will be a link for “Grants & Agreements” under the “Divisions” heading



Course Objectives



After completing this course, you will be able to:

- Summarize the Grantor benefits and goals, background, system capabilities, system navigation and understand security roles
- Identify the Grantor process areas
- Explain the Grantor implementation phases
- Summarize the Grantor Change Management activities





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- Course Introduction
- **Module 1 – Grantor Overview**
- Module 2 – eAuth and roles in Grantor
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Objectives



After completing this module, you will be able to:

- Describe the Grantor overview
- Explain the goals and benefits of Grantor
- Explain the implementation project timeline





Grantor Overview

Project

The Grantor project is jointly supported by the Office of the Chief Financial Officer (OCFO) and FAS, to streamline and standardize the Agency's grant management processes.

Objective

The objective is to improve grant management processes by efficiently providing FAS with a grants management system that supports the Agency's mission and makes it compliant to Federal accounting and departmental grant requirements.

Solution

The Grantor solution is a module in the FMMI landscape that utilizes SAP Customer Relationship Management (CRM), a commercial-off-the-shelf (COTS) solution which assists in replacing legacy system and manual work processes.



Goals and Benefits

- Allows for the standardization of grant execution and management across the Agency
- Will act as a single source of input for the all grant related information
- Reduces the throughput time of grant related operations associated with approvals and claims
- Will be able to provide more robust, accurate, and readily available reports
- Integrated with the FMMI solution
- Accurate data tracking of agreements, amendments, and claims as federally mandated



What functionality is included in Grantor?



- Agreement Creation
- Amendment / Modification Creation
- Approval Workflows
- Emailing and notification capabilities on work items
- Integration with FMMI
 - Funds commitment payments
- Claims Processing
- Reporting



Scope of Grantor Agreements



- OCBD non-food aid programs:
 - Technical Agricultural Assistance
 - Borlaug Fellowship
 - Cochran Fellowship
 - Faculty Exchange Program
 - Scientific Cooperation and Research
 - Scientific Cooperation Exchange Program with China
- Will include the following instrument types:
 - Grant Agreements
 - Cooperative Agreements
 - Cost Reimbursable Agreements
 - Joint Venture Agreements
- Grants and agreements with foreign entities will not be included



Will OCBD Continue to Use IAFTS?



- Yes, under 4 conditions:
 - IAFTS will continue to be used for the purpose of providing Project Management / Narrative related support
 - IAFTS will need to be used for foreign entities
 - IAFTS will need to be used for agreements with individuals
 - IAFTS will need to be used for agreements that are not included in the Grantor migration population

- SOPs and training will be provided to guide users, when and how to utilize Grantor and related processes



Who is affected?

- OCOO
 - Grants Management Staff
 - Budget
 - Reimbursable Agreements Branch (RAB)

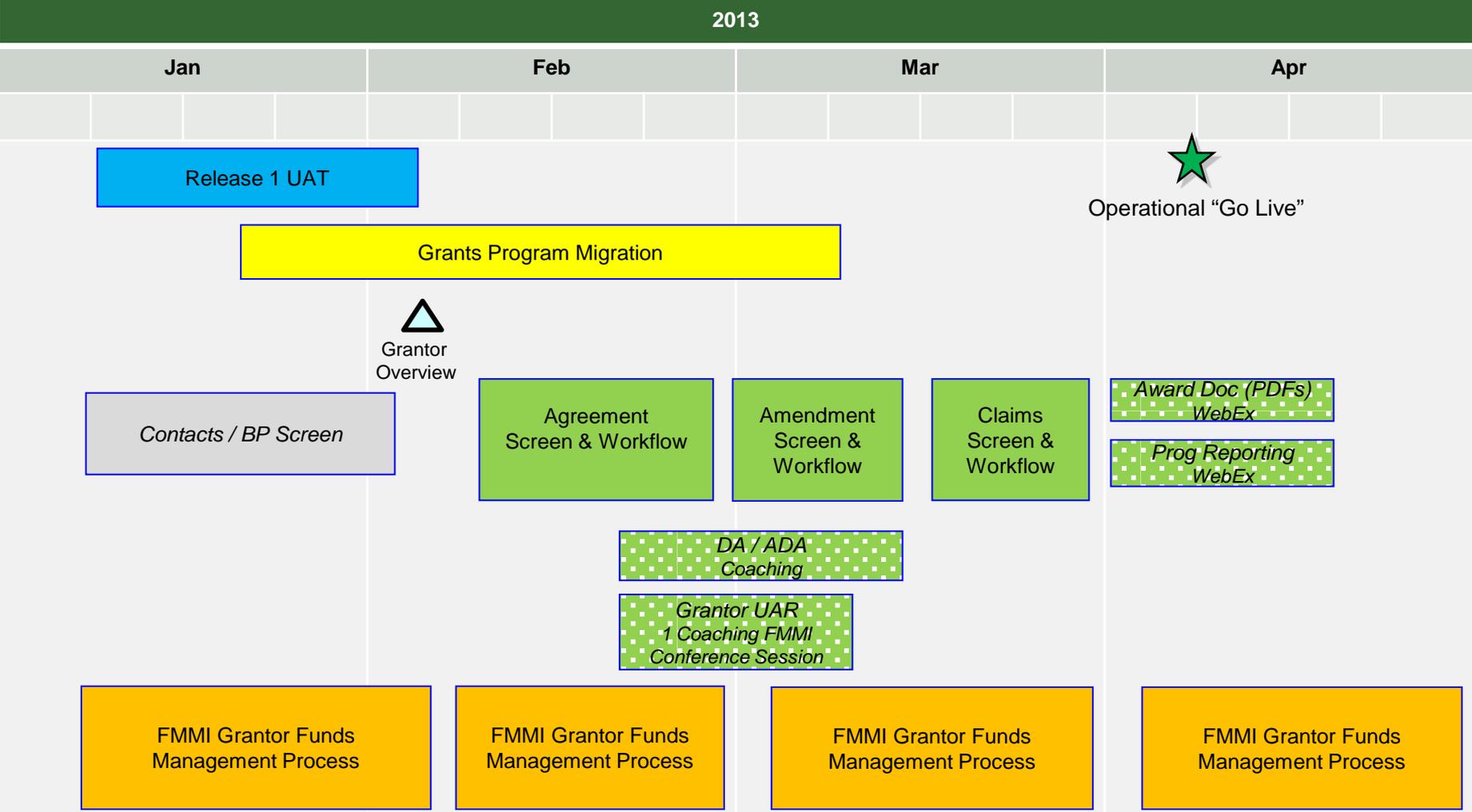
- APHIS – FOST

- OCBD non-food aid Programs

- OCRA Programs utilizing CFDA 10.960



Grantor Timeline





Module Summary



In this module, you have learned to:

- Describe the Grantor overview
- Explain the goals and benefits of Grantor
- Explain the implementation project timeline





Agenda



- Course Introduction
- Module 1 – Grantor Overview
- **Module 2 – eAuth and Roles in Grantor**
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Objectives



After completing this module, you will be able to:

- Describe the various roles in Grantor
- Understand how to request security access to Grantor





Role Alignment

Role alignment is the process of defining roles required to perform the grants management business processes and then mapping FAS users to those roles.

- Identifies the Grantor tasks, activities, and roles needed to perform business processes and recommends alignment to the people in the current organization
- Allows for proper segregation of duties and financial controls amongst users
- Gives Security Administrators the ability to efficiently assign appropriate activities to designated users avoiding degradation in performance or service
- Leads to proper development of training courses by role
- Assigns Grantor users the access to perform specific tasks within defined users roles to execute FMMI and Grantor business functions



How Roles Relate to Training



Role definition and mapping are closely tied to the overall training curriculum, as outlined in the **Grantor Change Discussion Guide**.

- The training curriculum and requirements are designed around the roles determined during the Role Alignment activities
- Training and Performance Support materials are designed to meet the requirements of each role
 - Individuals will receive only the training associated with the Role(s) to which they are mapped
 - A modular approach is used to build training and performance support to maximize reuse and to allow customization of individual training needs



Role: Program Assistant



- The **Program Assistant** can perform the following business activities:
 - Search and View Grantor Programs
 - Create Change Requests / Amendment
 - Edit Change Requests
 - Search and View Change Requests / Amendments
 - Create / Edits Agreements
 - Search and View Agreements
 - Search and View Work List
 - Create / Edit Claims
 - Search and View Business Partners/Contacts
 - Create / Edit Contacts
 - Generate Award Documents



Role: Program Manager



- The **Program Manager** can perform the following business activities:
 - Search and View Grantor Programs
 - Create Change Requests
 - Edit Change Requests
 - Search and View Change Requests
 - Create / Edit Agreements
 - Search and View Agreements
 - Search and View Work List
 - Create / Edit Claims
 - Search and View Business Partners/Contacts
 - Create / Edit Contacts
 - Generate Award Documents
- The **Program Manager** will have the ability to route agreements in to the approval workflow



Role: Branch Chief



- The **Branch Chief** can perform the following business activities:
 - Search and View Grantor Programs
 - Search and View Change Requests
 - Search and View Agreements
 - Search and View Work List
 - Search and View Business Partners/Contacts
 - Search and View Activities
- The **Branch Chief** is the stage 2 approver in the approval workflow



Role: Division Director



- The **Division Director** can perform the following business activities:
 - Search and View Grantor Programs
 - Search and View Change Requests
 - Search and View Agreements
 - Search and View Work List
 - Search and View Business Partners/Contacts
 - Search and View Activities
- The **Division Director** is the stage 3 approver in the approval workflow



Role: Special Assistant / Grants Management Officer (GMO)



- The **Special Assistant / GMO** can perform the following business activities:
 - Search and View Grantor Programs
 - Search and View Change Requests
 - Search and View Agreements
 - Search and View Work List
 - Search and View Business Partners/Contacts
 - Search and View Activities
- The **Special Assistant / GMO** are the stage 4 approvers in the approval workflow



Role: Agency Grants Management Officer (AGMO)



- The **AGMO** can perform the following business activities:
 - As a system “Super User” the **AGMO**, can perform most business activities in Grantor
 - Generate Federal Financial Accountability and Transparency Act Report (FFATA)
- The **AGMO** has the ability to be the approver at stages 1-5 of the approval workflow.



Role: Deputy Administrator (DA) / Assistant Deputy Administrator (ADA)



- The **DA / ADA** can perform the following business activities:
 - Search and View Grantor Programs
 - Search and View Change Requests
 - Search and View Agreements
 - Search and View Work List
 - Search and View Business Partners/Contacts
 - Search and View Activities
- The **DA / ADA** is the stage 6 approver in the approval workflow.
- The **DA / ADA** has signatory authority.



Role: Budget Official

- The **Budget Official** can perform the following business activities:
 - Search and View Grantor Programs
 - Search and View Change Requests
 - Search and View Agreements
 - Search and View Work List
 - Search and View Business Partners/Contacts
 - Search and View Activities
- The **Budget Official** facilitates at stage 7 in the approval workflow.
- The **Budget Official** is responsible for making sure that all documentation is properly completed prior to it reaching a potential recipient.



Role: Deputy Administrator Staff Member



- The **Deputy Administrator Staff Member** can perform the following business activities:
 - Search and View Grantor Programs
 - Search and View Change Requests
 - Search and View Agreements
 - Search and View Work List
 - Search and View Business Partners/Contacts
 - Search and View Activities
 - Create / Edit Claims
 - Search and View Claims
- The **Deputy Administrator Staff Member** has the ability to generate award documents, in preparation for the DA's signature.

- The **Grants Invoice Processor** can perform the following business activities:
 - Search and View Grantor Programs
 - Search and View Change Requests
 - Search and View Agreements
 - Search and View Work List
 - Search and View Business Partners/Contacts
 - Search and View Activities
 - Create / Edit Claims
 - Search and View Claims
- The **Grants Invoice Processor** can update claim statuses to “Valid” or “Invalid”.

Role: Grantor Evaluator

- The **Grantor Evaluator** can perform the following business activities:
 - Search and View Grantor Programs
 - Search and View Change Requests
 - Search and View Agreements
 - Search and View Work List
 - Search and View Business Partners/Contacts
 - Search and View Activities
 - Search and View Claims
- The **Grantor Evaluator** role has display only access in Grantor and will be assigned to users who are responsible for completing compliance related tasks.



Role: Funds Pre-Commitment Processor



- The **Funds Pre-Commitment Processor** can perform the following business activities:
 - Create Funds Pre-Commitment
 - Change Funds Pre-Commitment
 - Display Funds Pre-Commitment



Role: Funds Pre-Commitment Approver



- The **Funds Pre-Commitment Approver** can perform the following business activities:
 - Post Funds Pre-Commitment



Role: Grantor User Access Requestor (UAR)



- The **Grantor UAR** can perform the following business activities:
 - Maintain User Master Record
 - Display All User Reports

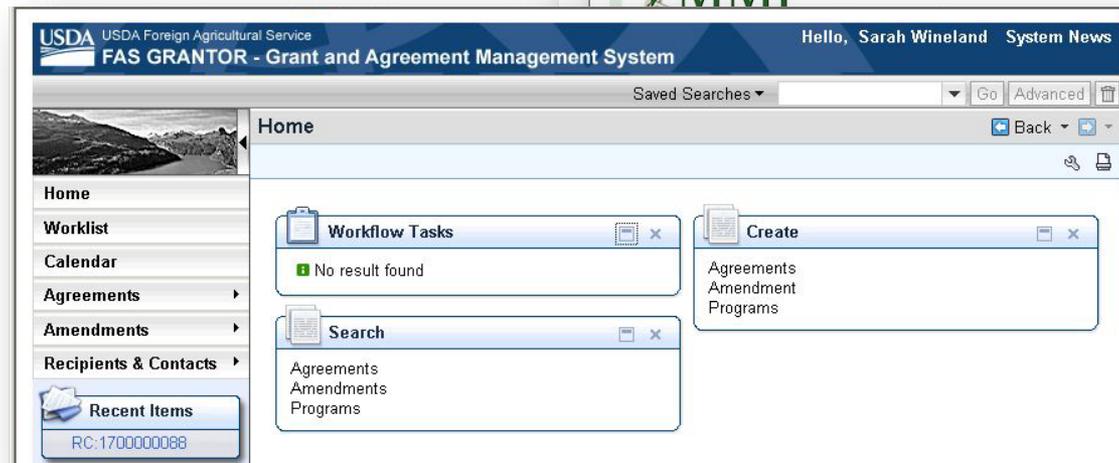


Enterprise Solution

Grantor System

- Web-based access
- Single sign-on integrated with eAuthentication
- The CRM application is launched by utilizing the FMMI portal
- Role-based access control

eAuthentication Login





Registering for eAuthentication



eAuth

- All users need to register for eAuth prior to requesting Grantor access
- Users may register for eAuth by going to this link:
<http://info.fmmi.usda.gov/index.html>
- Users who already have completed eAuth registration do not need to register again.

eAuthentication Registration

The screenshot shows the FMMI website interface. At the top, there is a navigation bar with links for Home, About FMMI, Help, Contact Us, and Site Map. Below the navigation bar, there is a section titled "FMMI Topics" with a list of links: Training, Latest News, Implementation, Configuration Decisions and Reference Documents, Frequently Asked Questions, and FMMI Glossary. In the center, there is a table titled "2/4/13 Status of FMMI BI Loads" with columns for "Tab" and "Updated As Of". The table lists various financial management tabs and their corresponding update dates. To the right of the table, there is a section titled "FMMI Portal" with links for Login/Enroll, Latest System Updates, and FMMI Portal Resources. The "eAuth Registration" link in the FMMI Portal Resources section is highlighted with a red box.

2/4/13 Status of FMMI BI Loads	
Tab	Updated As Of
Accounts Payable	All reports available as of 2/04/2013
Accounts Receivable	All reports available as of 2/04/2013
Cost Management	All reports available as of 2/04/2013
Funds Management	All reports available as of 2/04/2013
Purchasing	All reports available as of 2/04/2013
GL	All reports available as of 2/03/2013 currently processing
Cash Reconciliation	All reports available as of 2/04/2013
Spending Detail	All reports available as of 2/03/2013 currently processing
ULO Detail	All reports available as of 2/03/2013 currently processing
Payroll	All reports available as of 02/04/2013

This is the latest status as of 2/04/13. This status will be updated as current information is received.



Accessing Grantor



Here is an example of the Grantor tab in FMMI:

The screenshot shows the FMMI web application interface. At the top left is the USDA logo and the text "United States Department of Agriculture Financial Management Modernization Initiative". At the top right, it says "Welcome Christopher Riley" with links for "Help" and "Log Off". Below this is a navigation menu with several tabs: "agement", "Funds Management", "General Ledger Management", "Interface Table Maintenance", "Purchasing", "Grantor Management" (highlighted with a red box), "Base Role", "BI Favorites", and "Ad-hoc Analysis". To the right of the navigation menu are links for "History", "Back", and "Forward". The main content area features the FMMI logo and tagline "Transforming Financials at the People's Department". Below this is a "System Use Notification" section with a close button. The notification text reads: "This is a United States Department of Agriculture computer system, which may be accessed and used only for official Government business (or as otherwise permitted by regulation) by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action. All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including criminal investigations. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms."



System Access

How do I access the Grantor system?

- Log on to FMMI using Internet Explorer
 - No additional desktop client software is required
- Access the FMMI website to launch the application
 - <http://info.fmmi.usda.gov/index.html>
- Sign on to FMMI using your Level 2 eAuthentication username and password by clicking the “Login/Enroll” link on the “FMMI Portal” section
 - Integration with eAuthentication means you will have single sign-on between FMMI and other USDA applications such as AgLearn
 - FMMI and Grantor roles determine what activities a user performs when using the system and what sections of the system a user has access to
- Upon logging in to FMMI, select the “Grantor Management” tab
 - This will launch the Grantor (SAP-CRM) application in a separate window



Requesting Grantor Access



- Access to Grantor will be automatically given to all identified users for the first release of Grantor
- Subsequent users may request Grantor access through the Grantor UAR
 - User will complete the “FMMI User Request Form”
 - Found on FAS SharePoint site
 - Request the appropriate Grantor Role
 - Have the form signed by their supervisor
 - Submit the form to your FAS Grantor UAR
 - The UAR will process the request and submit to APHIS security via GRC tool



Module Summary

In this module, you have learned to:

- Understand the various roles within the Grantor application
- Identified how to access Grantor from the FMMI portal
- Discuss with new users how to request Grantor access





Agenda



- Course Introduction
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- **Module 3 – Basic Navigation**
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Objectives



After completing this module, you will be able to:

- Explain the Grantor user interface (UI) concept
- Describe the screen structure and its components

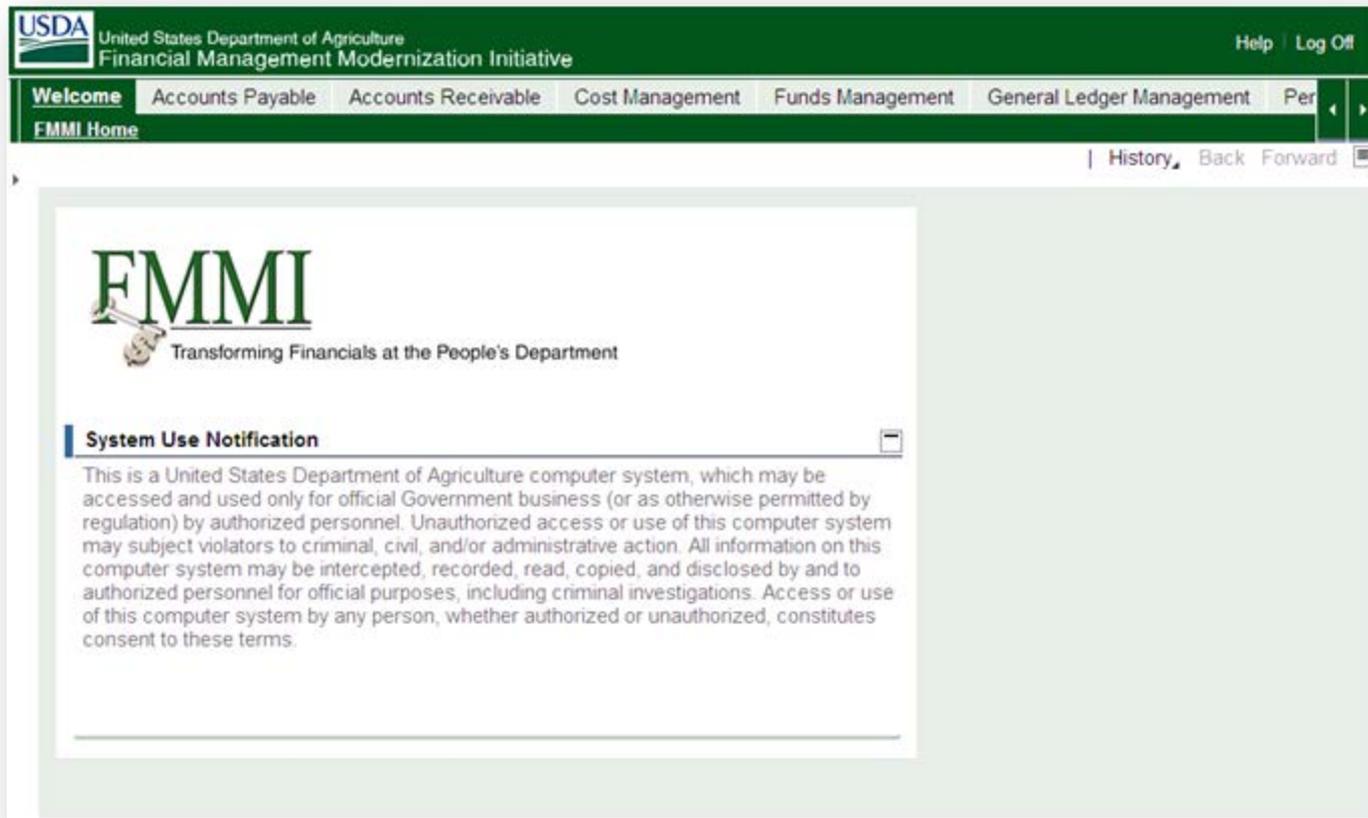




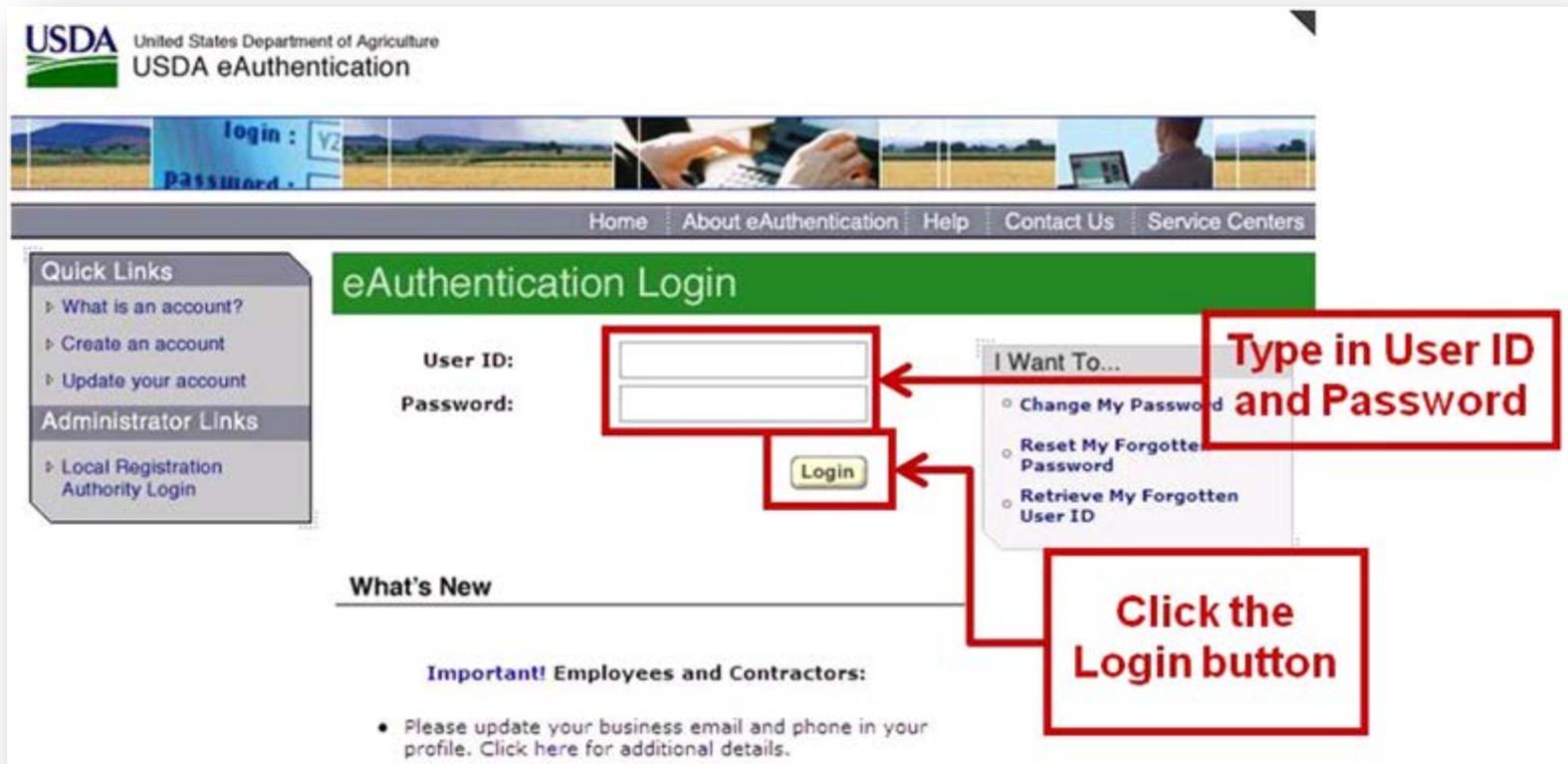
FMMI Portal Overview



When you login with your eAuthentication credentials, you will be directed to the FMMI Homepage.



When you click the Login button from the FMMI Homepage, you will be directed to the eAuthentication Login Page



USDA United States Department of Agriculture
USDA eAuthentication

Home About eAuthentication Help Contact Us Service Centers

eAuthentication Login

User ID:

Password:

I Want To...

- Change My Password
- Reset My Forgotten Password
- Retrieve My Forgotten User ID

Quick Links

- What is an account?
- Create an account
- Update your account

Administrator Links

- Local Registration
- Authority Login

What's New

Important! Employees and Contractors:

- Please update your business email and phone in your profile. Click here for additional details.

Type in User ID and Password

Click the Login button



eAuthentication Warning

Before being directed to the FMMI Portal Logon you must agree to the terms and conditions of eAuthentication

*****WARNING*****

- You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.
- Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.
- By using this information system, you understand and consent to the following:
 - You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, the government may for any lawful government purpose monitor, intercept, search and seize any communication or data transiting or stored on this information system.
 - Any communications or data transiting or stored on this information system may be disclosed or used for any lawful government purpose.
 - Your consent is final and irrevocable. You may not rely on any statements or informal policies purporting to provide you with any expectation of privacy regarding communications on this system, whether oral or written, by your supervisor or any other official, except USDA's Chief Information Officer.

*****WARNING*****

Cancel I Agree

Click the I Agree button



Identify the Grantor tab



The screenshot shows the USDA Financial Management Modernization Initiative (FMMI) web application. The top navigation bar contains the following tabs: Management, Funds Management, General Ledger Management, Interface Table Maintenance, Purchasing, **Grantor Management** (highlighted with a red box), Base Role, BI Favorites, and Ad-hoc Analysis. The user is logged in as Christopher Riley. Below the navigation bar, the FMMI logo and tagline "Transforming Financials at the People's Department" are displayed. A "System Use Notification" box is present, containing the following text:

System Use Notification

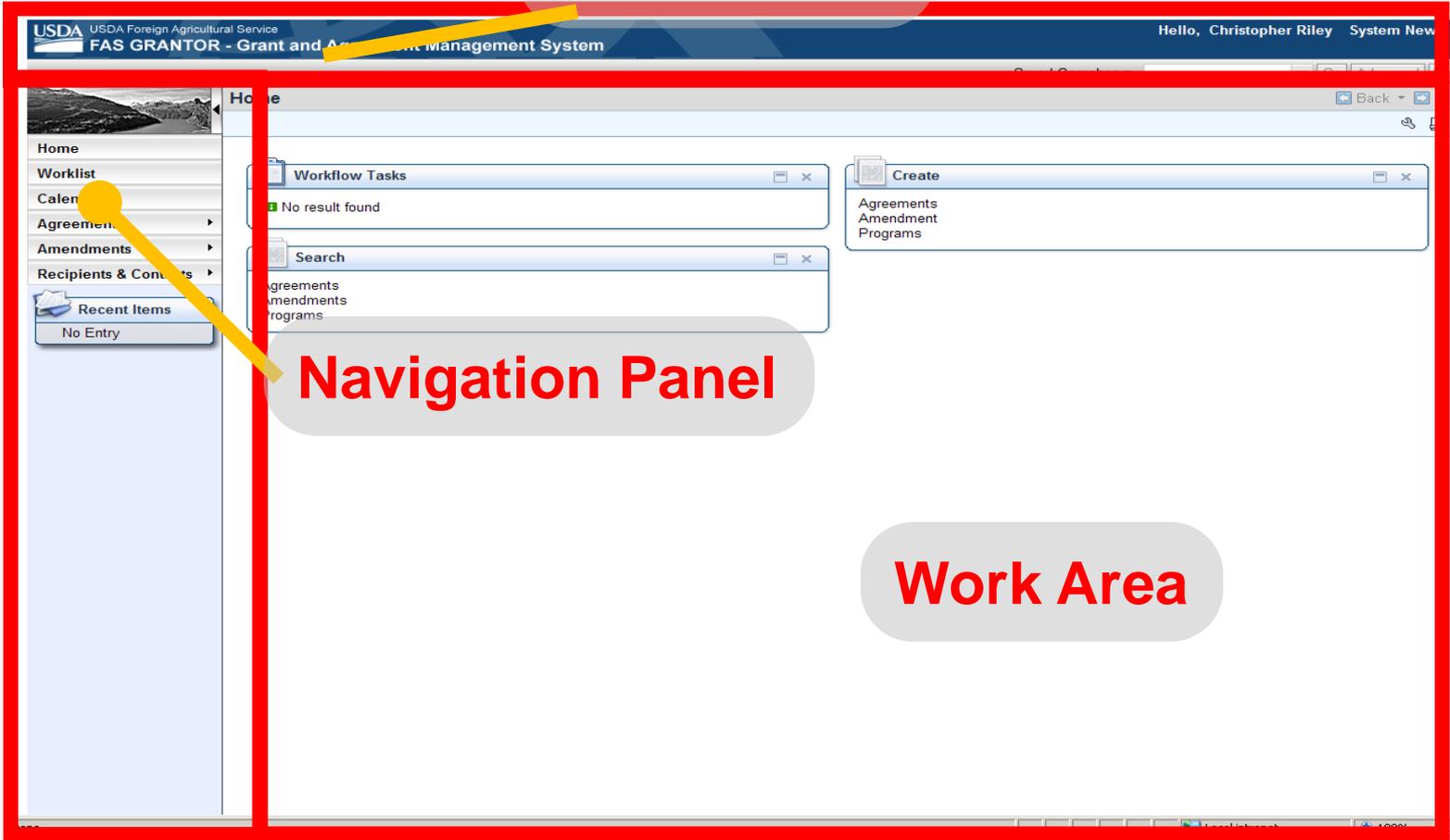
This is a United States Department of Agriculture computer system, which may be accessed and used only for official Government business (or as otherwise permitted by regulation) by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action. All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including criminal investigations. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms.



Understanding the UI Screen



Header Area



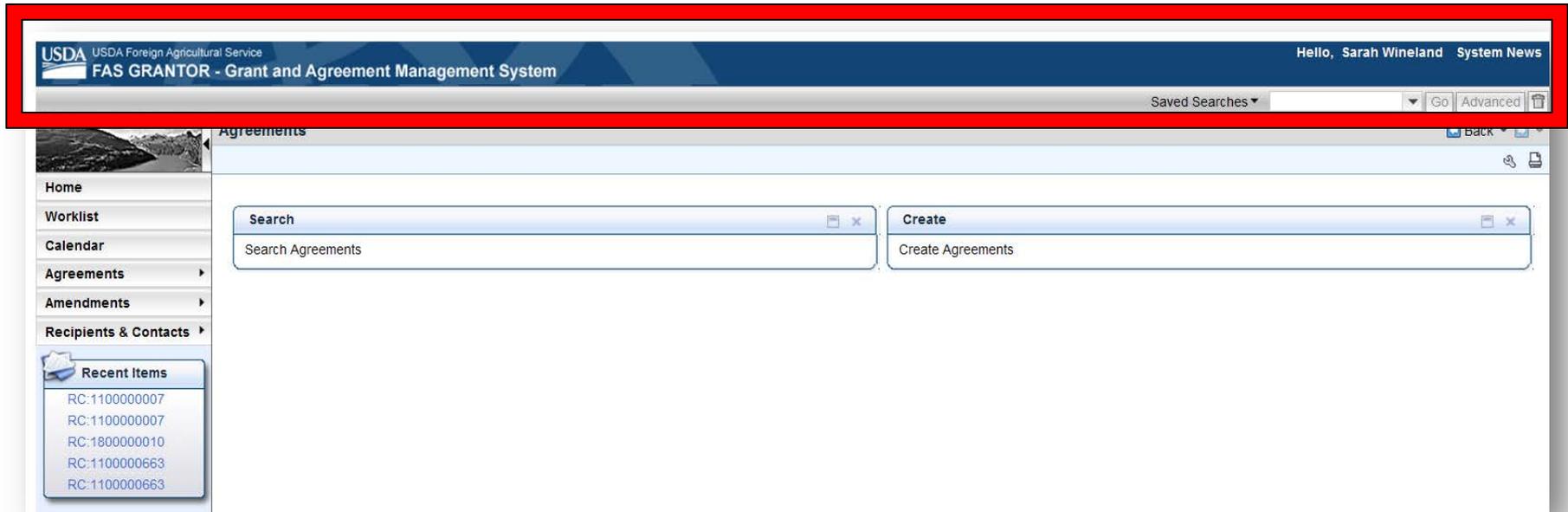
Navigation Panel

Work Area



Header Area

The Header Area is located in the upper part of the web browser window. This area does not change when the user navigates from one page to another.





Navigation Panel

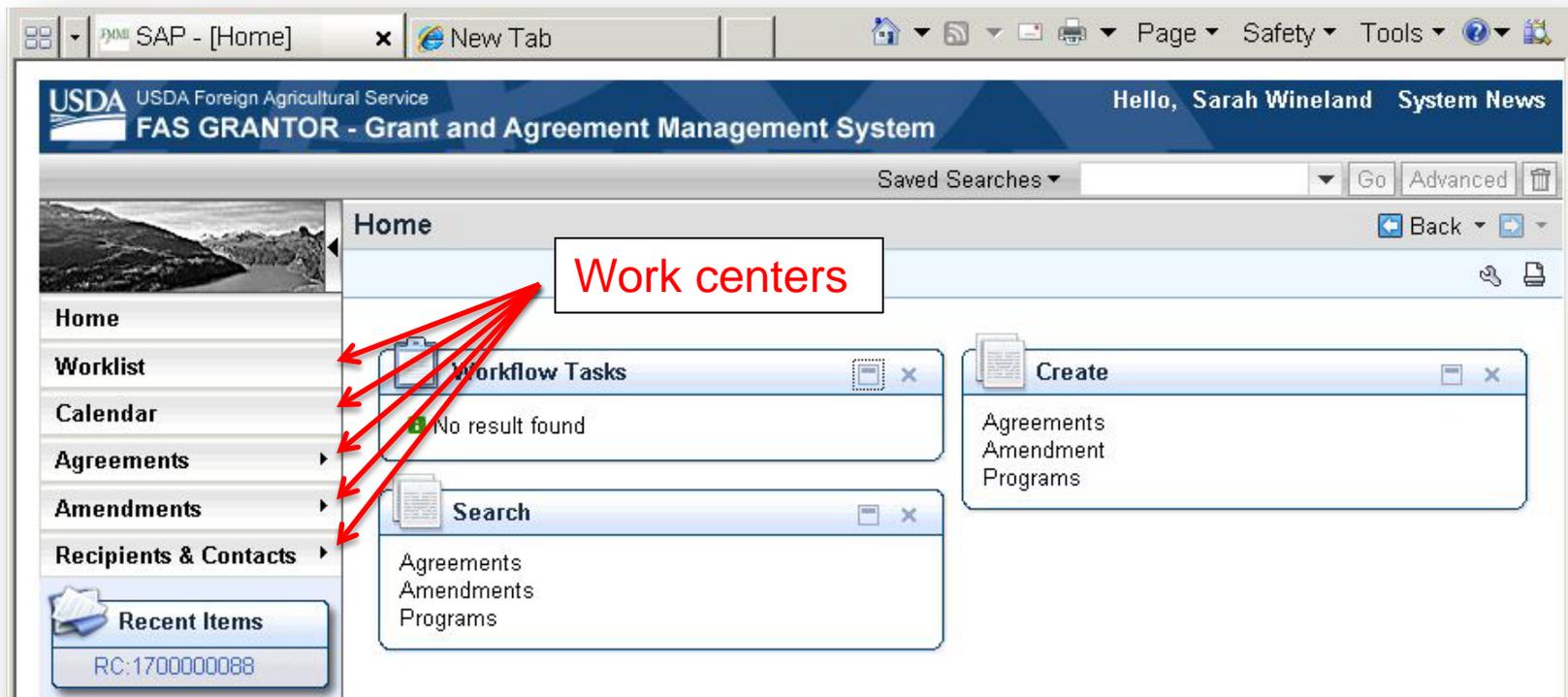


The Navigation Panel is located in the left side of the web browser window. This area will vary upon the users role. The Navigation Panel is made up of work centers allowing a user to perform system functions based upon their role assignment. Users are not able to access a transaction in Grantor that is not in their role profile.



Work Centers

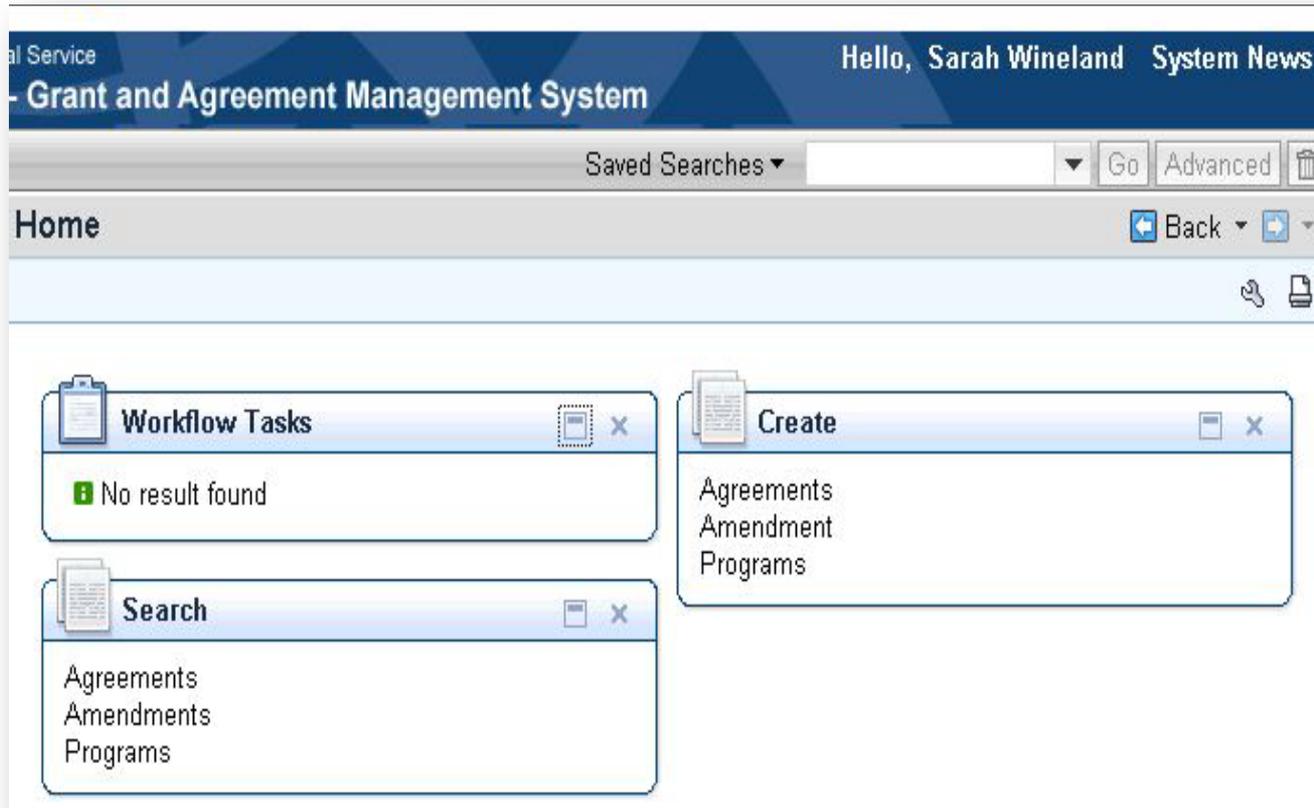
Work centers allow a user to perform system functions based upon their role assignment. Grantor business operations are carried out through the use of work centers.





Work Area

The **Work Area** is similar to the Navigation Panel, where all content is visualized. The content of the work areas reflects the roles of the user and the work centers in the user's Navigation Panel.





Module Summary

In this module, you have learned to:

- Explain the Grantor system elements
- Understand the Grantor user interface concept





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Grantor Training Curriculum

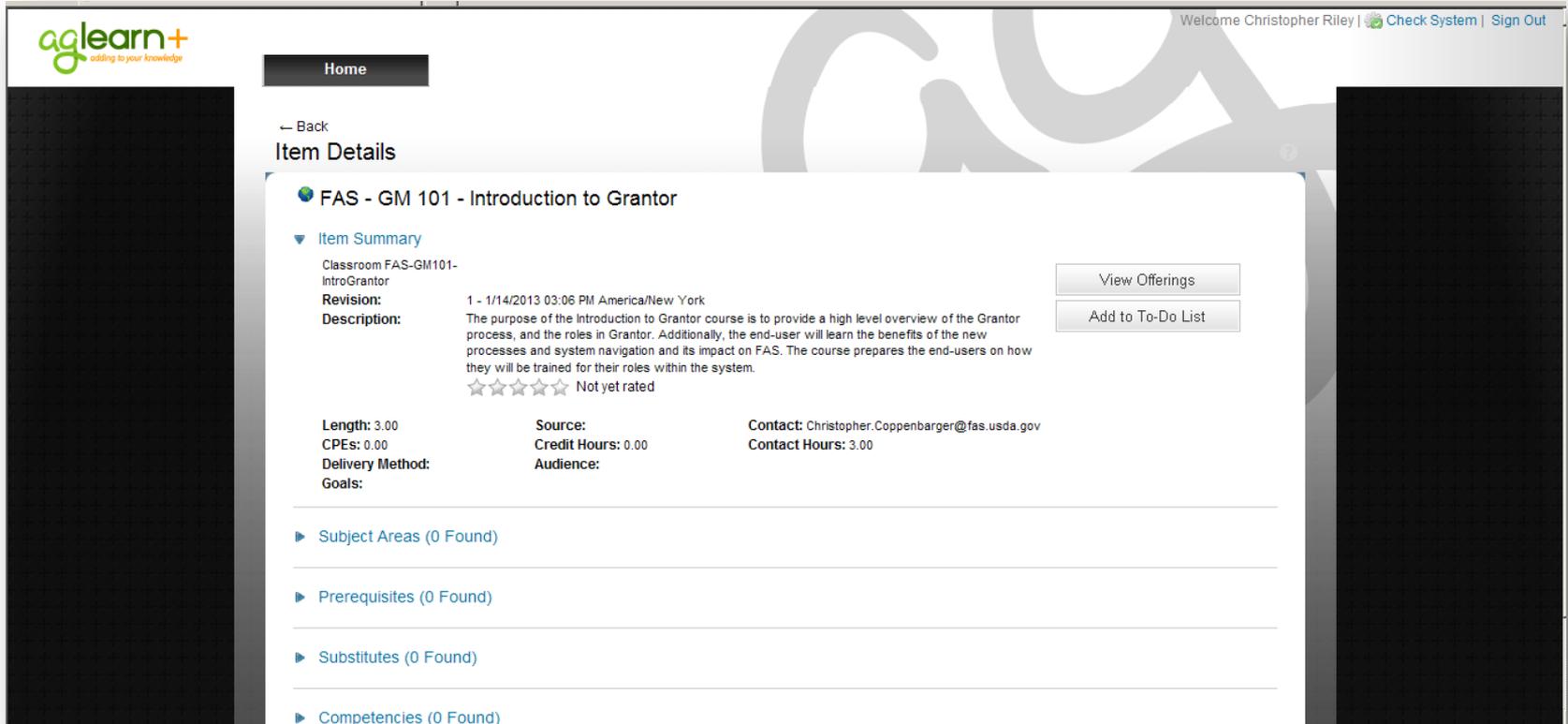


The FMMI Grantor training curriculum uses a multi-level, building-block approach to transition users from a high-level understanding of FMMI to being capable of performing their specific role / function within Grantor CRM.

	Level 1 – FMMI Grantor Overview Training	Level 2 – FMMI Grantor Process & System Training
Overview	<ul style="list-style-type: none"> Provide an overview of the FMMI Grantor program and develop awareness of the impact at USDA Includes definitions, financial concepts, purpose of the program, reasons for change, changes to the high level processes, roles, benefits of the new processes and systems, and impacts to the business 	<ul style="list-style-type: none"> Provide process-driven and system training on the process changes for Budget Management, Pre-Award, and Post Award areas Includes the core process flow, key concepts and conceptual changes to the process Teach how to navigate within the system via hands-on training with detailed instructions on how to navigate and use the Grantor to execute system transactions and manual procedures Includes log on procedures, use of icons, key navigation concepts, menu selections, tabs, navigation bars, and FMMI Online Help, business concepts, definitions, roles, changes, learning how to perform detailed transactions, data entry, using application functionality, and performing manual procedural steps

Register for 200 Level Training

- Look out for a communication from your Agency Training Lead that outlines training logistics for your Agency
- Register for your 200 Level classroom training in AgLearn



The screenshot shows the AgLearn+ interface. At the top left is the AgLearn+ logo with the tagline "adding to your knowledge". The top right corner displays "Welcome Christopher Riley" and links for "Check System" and "Sign Out". A navigation bar includes a "Home" button. Below the navigation, there is a "Back" link and the heading "Item Details".

The main content area displays the following information for the item "FAS - GM 101 - Introduction to Grantor":

- Item Summary:** Classroom FAS-GM101-IntroGrantor
- Revision:** 1 - 1/14/2013 03:06 PM America/New York
- Description:** The purpose of the introduction to Grantor course is to provide a high level overview of the Grantor process, and the roles in Grantor. Additionally, the end-user will learn the benefits of the new processes and system navigation and its impact on FAS. The course prepares the end-users on how they will be trained for their roles within the system.
- Rating:** ☆☆☆☆☆ Not yet rated
- Length:** 3.00
- CPEs:** 0.00
- Delivery Method:**
- Goals:**
- Source:**
- Credit Hours:** 0.00
- Audience:**
- Contact:** Christopher.Coppenbarger@fas.usda.gov
- Contact Hours:** 3.00

Buttons for "View Offerings" and "Add to To-Do List" are located to the right of the description. Below the main details, there are sections for "Subject Areas (0 Found)", "Prerequisites (0 Found)", "Substitutes (0 Found)", and "Competencies (0 Found)".



Course Summary



In this course, you have learned to:

- Summarize the Grantor benefits and goals, background, system capabilities, system navigation and understand security roles
- Identify the Grantor process areas
- Explain the Grantor implementation phases
- Summarize the Grantor Change Management activities





Course Evaluation

Congratulations, you have completed:

GM 101 – Introduction to Grantor

Your Agency Training Lead will also be sending you a link via email for you to complete.

- **Course Evaluation** allows you to provide feedback on the course
 - The Grantor training team will use the feedback to determine the overall effectiveness of the training program and identify improvements for future sessions
 - Answers will remain confidential





Course Evaluations / Surveys



- All users will need to complete a course evaluation and completion survey to be given complete credit for GM 101

http://www.surveymonkey.com/s/Grantor_FAS



Appendix: Grantor Key Terminology



General Terms:

- **Grantor** - Name of the grants management system being implemented to standardize and streamline grant related work processes
- **SAP** - **Systems, Applications, and Products in Data Processing and is an integrated business software package**
- **ERP** - Enterprise Resource Planning - Software that integrates all of an organization's data and processes into a single unified system
- **COTS** - Commercial Off-the-Shelf (COTS) – Software that is ready-made and available for sale, lease, or license which reduces the overall system development costs and involve less development time because the components can be bought instead of developed from scratch



Appendix: Grantor Key Terminology



Role Alignment Terms:

- **Role** - Defined as a group of tasks within a business process that are logically performed by one individual. Roles are the basic building block of organization design. Provides system access to the user.
- **Role Activities** – The process model is divided into several levels; Process, Sub-process and Activity. Activity is the lowest level of the model. It describes the detailed tasks within the process model.