

Agenda

This training includes the following five sections:

- A. Course Introduction**
- B. Module 1 – Grantor Overview
- C. Module 2 – User Roles and Training
- D. Module 3 – Access and Basic Navigation
- E. Course Summary

This section includes the Course Introduction

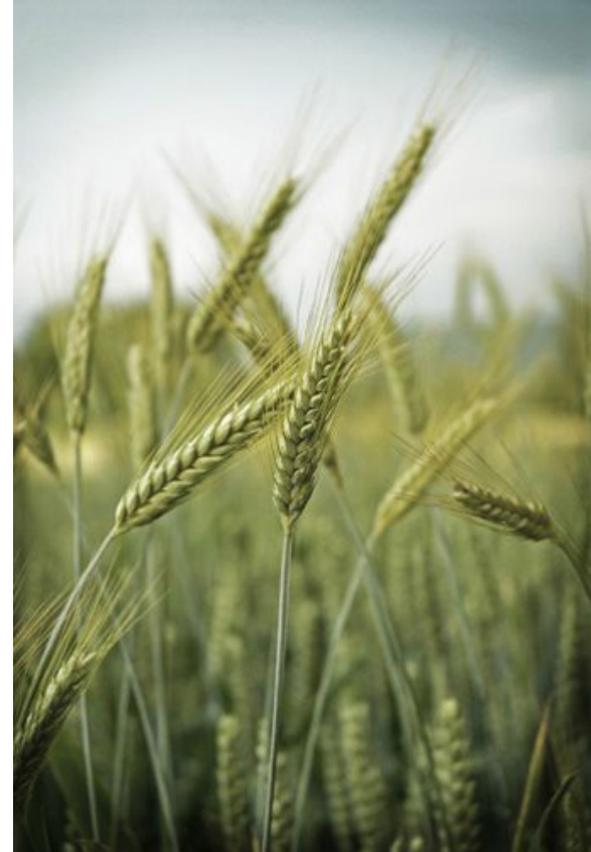
Course Structure and Additional Materials

- Course Form and Structure
 - Online, self-paced course
 - Modules organized by topic
- Course Materials
 - In addition to AgLearn, this course is located on the FAS SharePoint site under the OCOO tab in the [Grants and Agreements division page](#)
- Point of Contact
 - All Grantor-related questions and/or comments should be directed to the Grantor Help Desk
 - Email GrantorHelpDesk@fas.usda.gov

Course Objectives

After completing this course, you will be able to accomplish the following six items:

- A. Summarize Grantor benefits and goals, background, system navigation, and security
- B. Explain the Grantor implementation phases
- C. Identify Grantor process areas and describe business activities for various roles
- D. Understand additional training offerings and how to access training materials
- E. Request security access
- F. Navigate to and within Grantor



Agenda

This training includes the following five sections:

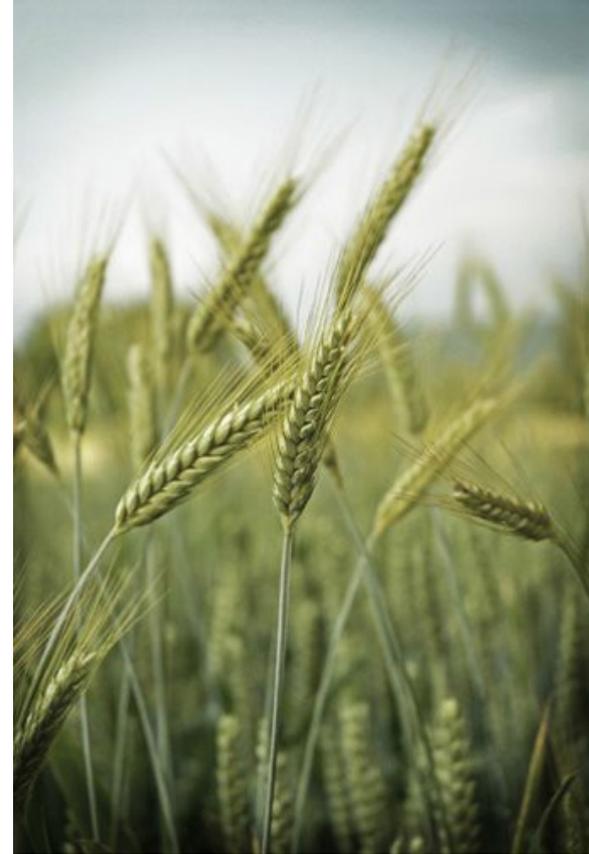
- A. Course Introduction
- B. Module 1 – Grantor Overview**
- C. Module 2 – User Roles and Training
- D. Module 3 – Access and Basic Navigation
- E. Course Summary

This module provides an overview of Grantor

Module Objectives

After completing this module, you will be able to accomplish the following four items:

- A. Understand general terms and USDA acronyms
- B. Describe Grantor functionality
- C. Explain the goals and benefits of Grantor
- D. Explain the implementation project timeline





General Terms

- **COTS** (Commercial off-the-Shelf) – Software that is ready-made and available for sale, lease, or license which reduces the overall system development costs and involves less development time because the components can be bought instead of developed from scratch
- **CRM** (Customer Relationship Management) – Software for managing an organization's interactions with current and future customers
- **Grantor** – Name of the grants management system being implemented to standardize and streamline grant-related work processes
- **Role** – Defined as a group of tasks within a business process that are logically performed by one individual; system access is granted by role
- **Role Functions** – Specific business activities a role can accomplish
- **SAP** (**S**ystems, **A**pplications, and **P**roducts in Data Processing) – a corporation that makes software to manage business operations and customer relations (the creator of Grantor)



USDA Acronyms

- **APHIS** – Animal and Plant Health Inspection Service
- **CFDA** – Catalog of Federal Domestic Assistance
- **FAS** – Foreign Agriculture Service
- **FMMI** – Financial Management Modernization Initiative
- **FMS** – Financial Management Services
- **GRC** – Governance, Risk, and Compliance
- **NFC** – National Financial Center
- **OASA** – Office of Agreements and Scientific Affairs
- **OCBD** – Office of Capacity Building and Development
- **OCFO** – Office of the Chief Financial Officer
- **OCOO** – Office of the Chief Operating Officer
- **OCRA** – Office of Country and Regional Affairs

Grantor Overview

Project

As initially implemented, the Grantor project streamlined and standardized Foreign Agriculture Service (FAS) grants management processes by implementing Lean Six Sigma grants processes. The project is jointly supported by the Office of the Chief Financial Officer (OCFO) and FAS.

Objective

The objective is to improve grants management processes by providing an efficient grants management system that supports the Agency's mission and makes it compliant with Federal accounting and departmental grant requirements. Grantor is part of the National Financial Center's (NFC) shared financial service provider portfolio and is intended as a USDA enterprise solution.

Solution

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

Grantor Functionality

- **Agreement creation:** input project and budget information, recipient contacts, terms and conditions, etc.
- **Amendment / modification creation:** update scope of work and/or budget information
- **Approval workflows and notifications:** receive notifications of necessary steps and approvals, with next steps automatically assigned
- **FMMI integration:** use up-to-date agreement-related financial data
- **Funds commitment payments:** process and account for claims seamlessly with funds reserved by program and pre-committed by agreement
- **Claims processing:** receive requests for advance or reimbursement, confirm eligibility and validity, and approve for payment
- **Reporting:** process progress and financial reports; submit spending reports

Goals and Benefits

- Allows for the **standardization** of grant execution and management across the Agency
- Will act as a **single source of input** for all grant-related information
- **Reduces the time required** for 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 allowing for **current, agreement-related financial data**
- **Accurate data tracking** of agreements, amendments, and claims as mandated by the Federal government



Scope of Grantor Agreements

- Six FAS Catalog of Federal Domestic Assistance (CFDA) programs
 - Technical Agricultural Assistance (includes OCBF, OCRA, and OASA)
 - Borlaug Fellowship
 - Cochran Fellowship
 - Faculty Exchange Program
 - Scientific Cooperation and Research
 - Scientific Cooperation Exchange Program with China
- Four instrument types with domestic entities on a reimbursable basis
 - Grant Agreement
 - Cooperative Agreement
 - Cost Reimbursable Agreement
 - Joint Venture Agreement

Continued Use of IAFTS

- FAS will continue using the International Agreements and Financial Tracking System (IAFTS) for the purpose of providing detailed project management and project narrative tracking functionality
- IAFTS will continue to be used for agreements with
 - Foreign entities
 - Individuals
 - Advance payments

Who benefits from Grantor?

- FAS OCOO
 - Grants Management Staff
 - Budget and Financial Management Division
 - Reimbursable Agreements Branch
- FAS OCBD non-food aid programs
- FAS OCRA and OASA programs utilizing CFDA 10.960
- APHIS Financial Operations Services Team
- USDA OCFO
- Applicants and recipients



Current and Scheduled Grantor Functionality (Releases 1 & 2)

Release 1	Release 2A	Release 2B	Release 2C	Release 2D	Release 2E
<ul style="list-style-type: none"> ▪ Set up Program ▪ Agreement Screen ▪ Amendment Screen ▪ Claims Screen ▪ Manage Attachments 	<ul style="list-style-type: none"> ▪ Closeout <ul style="list-style-type: none"> - Early Notification - Creation Screen / Search Screen - Interface ▪ NICRA Enhancements on Agreement, Amendment, and Claim Screens ▪ Agreement Screen Enhancements ▪ Claims Screen Modification ▪ Funds Commitment Interface Update <ul style="list-style-type: none"> - Funds Pre-Commitment Data Lookup Update 	<ul style="list-style-type: none"> ▪ External / Internal User External Portal Main Menu Screen ▪ External Portal <ul style="list-style-type: none"> - Splash Screen - Manage Permissions - Create Opportunity - Search Opportunity - Create Application - Search Application ▪ Application Search in CRM ▪ Application to Agreement Data Transfer ▪ External User View Approved Agreement PDF ▪ Agreement / Amendment PDF ▪ Closeout Form ▪ FFATA Logic Update 	<ul style="list-style-type: none"> ▪ External User <ul style="list-style-type: none"> - Search Agreement Screen - Claim Submission - Claim Approval ▪ Repayment Functionality ▪ Repayment Balance Updates ▪ Repayment Creation Interface ▪ Electronic Signature 	<ul style="list-style-type: none"> ▪ External User <ul style="list-style-type: none"> - Search Amendment Screen - View Approved Amendment PDF - Progress Report Screen - Financial Report Screen - Property Report Screen 	<ul style="list-style-type: none"> ▪ Advance Functionality ▪ Advance Creation Interface ▪ Foreign Entity <ul style="list-style-type: none"> - Agreement Screen - Amendment Screen - Decision Questionnaire Update - Agreement PDF Forms - Amendment PDF Form ▪ FFATA <ul style="list-style-type: none"> - Logic Update - Auto Generation Program - PI Interface - FIPS Data Upload Program - FFATA Data

Grantor Release 2 Timeline

The following graphic illustrates when each section of Grantor Release 2 will take place:

	Jan '14	Feb '14	Mar '14	Apr '14	May '14	Jun '14	Jul '14	Aug '14	Sep '14	Oct '14	Nov '14	Dec '14	Jan '15	Feb '15	Mar '15	Apr '15	May '15	
Releases																		
2.A	█																	
Prototype		█																
2.B			█															
2.C				█					█									
2.D									█									
2.E														█				

Planned Grantor Functionality (Release 3)

The following features are planned for addition through Release 3 in early 2016:

- Release 2 enhancements, such as additional functionality for advance payment, closeout, and reporting
- Uniform administrative, cost, and audit requirements taking effect 12/26/2014
- Additional instrument type: fixed amount awards (i.e., a specific level of support is provided without regard to actual costs incurred under the award)

The following items will also be assessed for potential incorporation into Grantor:

- Food Aid Information System (FAIS): FAS software currently used to manage food aid grants and agreements
- Unified Export Strategy (UES): FAS software currently used to apply for market development and export promotion programs
- Project System: COTS software to structure and manage projects
- Additional instrument type: interagency agreements (i.e., intragovernmental procurement)

Module Summary

In this module, you have learned to do the following four items:

- A. Understand general terms and USDA acronyms
- B. Describe Grantor functionality
- C. Explain the goals and benefits of Grantor
- D. Explain the implementation project timeline



Agenda

This training includes the following five sections:

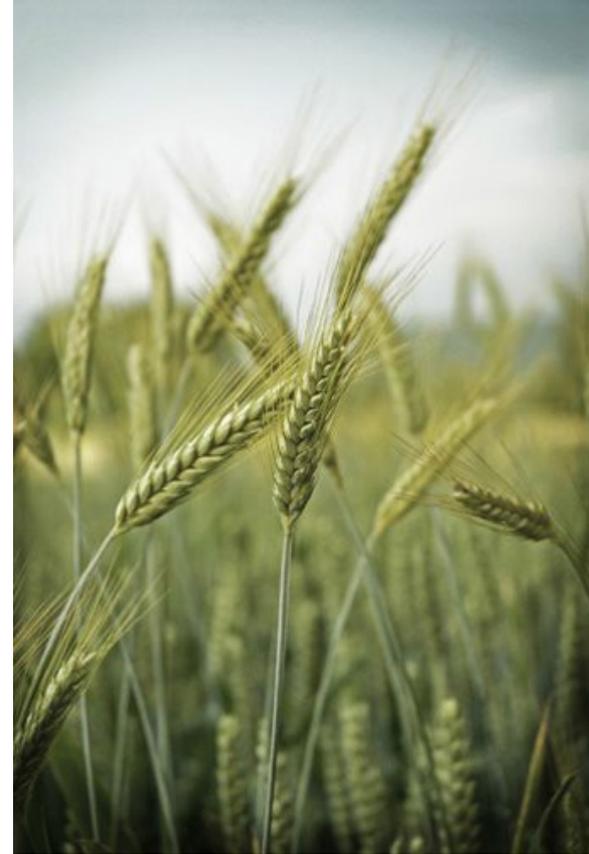
- A. Course Introduction
- B. Module 1 – Grantor Overview
- C. Module 2 – User Roles and Training**
- D. Module 3 – Access and Basic Navigation
- E. Course Summary

This module provides information on user roles and training

Module Objectives

After completing this module, you will be able to accomplish the following three items:

- A. Describe the various roles in Grantor
- B. Explain training courses required for each Grantor user role
- C. Describe how to access training courses and materials



Role Alignment

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

This results in the following five benefits:

- A. Identifies the Grantor tasks, activities, and roles needed to perform business processes and **recommends alignment** to team members
- B. Allows for proper **segregation of duties** and financial controls among users
- C. Gives Security Administrators the ability to assign appropriate activities efficiently to designated users **avoiding degradation in service** or performance
- D. Leads to **proper development of training courses** by role
- E. Assigns Grantor users the **access to perform specific tasks** within defined user roles to execute FMMI and Grantor business functions

Grantor Roles

These are roles in the Grantor system. Users may typically have only one role.

Roles	Abbreviation
Agency Grants Management Officer	AGMO
Branch Chief	BC
Budget Official	BO
(Assistant) Deputy Administrator	(A)DA
Deputy Administrator Staff Member	DASM
Division Director	DD
Grantor Evaluator	GE
Grants Invoice Processor	GIP
Grants Management Officer	GMO
Program Assistant	PA
Program Manager	PM
Special Assistant	SA



Summary of Role Functions (1 of 2)

For an outline version of this table, click here: [Summary of Grantor Role Functions 1.doc](#)

	AGMO	BC	BO	(A)DA	DASM	DD	GE	GIP	GMO	PA	PM	SA
Create program and funds reservation	✓											
Edit program	✓											
Search and view program	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Edit recipient	✓											
Search and view recipient	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Create and edit contact	✓									✓	✓	
Search and view contact	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Create and edit agreement	✓									✓	✓	
Search and view agreement	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Stage 1: approve, return, or cancel agreement	✓										✓	
Stage 2: approve or return agreement	✓	✓										
Stage 3: approve or return agreement	✓					✓						
Stage 4: approve, return, or approve / forward to AGMO	✓								✓			✓
Stage 5: approve or return agreement	✓											
Stage 6: approve or return agreement				✓								
Generate award document	✓				✓					✓	✓	
Stage 7: approve or return agreement			✓									



Summary of Role Functions (2 of 2)

For an outline version of this table, click here: [Summary of Grantor Role Functions 2.doc](#)

	AGMO	BC	BO	(A)DA	DASM	DD	GE	GIP	GMO	PA	PM	SA
Create and edit funds pre-commitment			✓									
Display funds pre-commitment			✓								✓	
Post and edit funds pre-commitment											✓	
Create claim	✓							✓				
Edit claim										✓	✓	
Search and view claim	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Upload progress report	✓									✓	✓	
Edit progress report status	✓										✓	
Search and view progress report	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Search and view worklist	✓	✓	✓	✓		✓			✓	✓	✓	✓
Generate and submit FFATA report	✓											
Create and edit amendment	✓									✓	✓	
Search and view amendment	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Close out agreement	✓								✓			
Deobligate any remaining funds and mark the funds commitment as complete			✓									
Close grant program	✓											

Training Requirements for Grantor Roles

Training courses are fitted to role functions, or sets of specific business activities. Required training courses address all of the tasks an individual will encounter in Grantor – and only those relevant tasks.

Grantor training courses are listed on the next slide. Courses are available as self-paced classes in AgLearn or as coaching sessions with permission from the Grantor Help Desk.

Check marks indicate which training courses are required for each role **prior to gaining access**. For example, to obtain the Branch Chief role in Grantor, an individual in that position must complete the following three online courses (or coaching sessions):

- A. GM 101: Introduction to Grantor
- B. GM 102: Introduction to Grants and Agreements
- C. GM 203: Agreement Approval

Training Courses for Grantor Roles

For an outline version of this table, click here: [Training Courses for Grantor Roles.doc](#)

Course	Delivery	Hours	AGMO	BC	BO	(A)DA	DASM	DD	GE	GIP	GMO	PA	PM	SA
GM 101 Introduction to Grantor	Online ^a	1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
GM 102 Introduction to Grants and Agreements	Online ^a	1	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓
GM 201 Agreement Creation and Drafting	Online ^a	1.5	✓									✓	✓	
GM 202 Amendment Creation and Drafting	Online ^a	1.5	✓									✓	✓	
GM 203 Agreement Approval	Online ^a	1.5	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓
GM 204 Award Packet	Online ^a	1	✓				✓					✓	✓	
GM 205 Claim Review and Processing	Online ^a	1	✓							✓		✓	✓	
GM 206 Progress Reporting	Online ^a	1	✓									✓	✓	
GM 207 Funds Management	Online ^a	1	✓		✓							✓	✓	
GM 208 Program and Recipient Setup	Coaching session	1	✓											
GM 209 FFATA Reporting	Coaching session	1	✓											
GM 210 Agreement Closeout	Coaching session	1	✓											

^a Or coaching session with approval from Grantor Help Desk

Additional FMMI and Grantor Roles

The following two FMMI roles are required to create and approve funds pre-commitments for grants and agreements:

- A. Funds Pre-Commitment Approver role
- B. Funds Pre-Commitment Processor role

As stated on the *New User Request* form, **Program Managers** are to request the Funds Pre-Commitment **Approver** role and **Budget Officials** are to request the Funds Pre-Commitment **Processor** role.

The following three Governance, Risk, and Compliance (GRC) roles are used to maintain security and manage user roles, with custom training provided as needed:

- A. GRC Security Administrator
- B. GRC User Access Requestor
- C. GRC Role Approver

Module Summary

In this module, you have learned to do the following three items:

- A. Describe the various roles in Grantor
- B. Explain training courses required for each Grantor user role
- C. Describe how to access training courses and materials



Agenda

This training includes the following five sections:

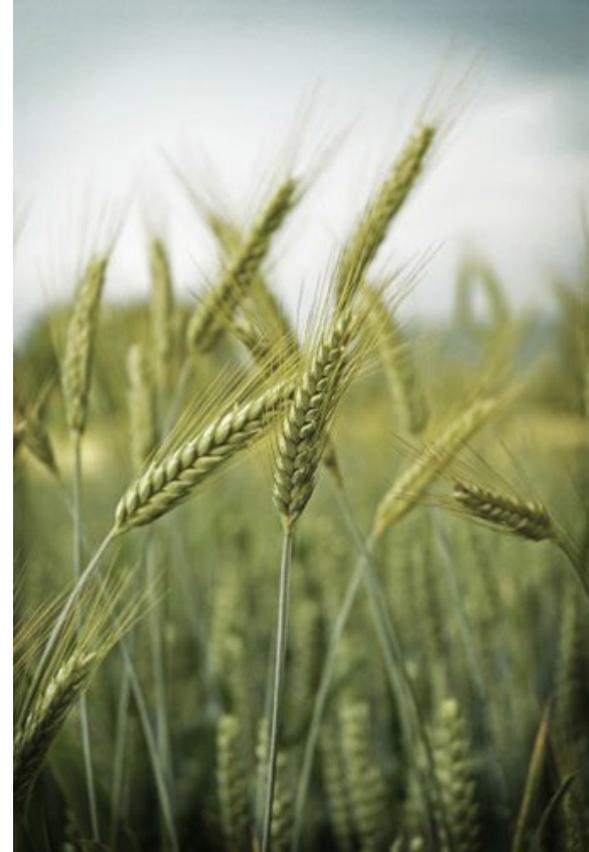
- A. Course Introduction
- B. Module 1 – Grantor Overview
- C. Module 2 – User Roles and Training
- D. Module 3 – Access and Basic Navigation**
- E. Course Summary

This module covers gaining access to Grantor and navigating within it

Module Objectives

After completing this module, you will be able to accomplish the following four items:

- A. Understand how to request security access to Grantor
- B. Understand how to access Grantor from the FMMI portal
- C. Explain the Grantor user interface
- D. Describe the screen structure and its components



Grantor Access Overview

Gaining access to Grantor includes the following seven steps:

- A. Gain eAuthentication access
- B. Download *New User Request* form
- C. Complete FMMI training and registration
- D. Complete Introduction to Grantor training course
- E. Submit *New User Request* form
- F. Complete any additional required training courses
- G. Log in to Grantor

Each of these steps is described in greater detail in this section

Gain eAuthentication Access

- All users need to register for Level 2 eAuth prior to requesting Grantor access
- **USDA customers and external users**, register by going to <http://info.fmmi.usda.gov/>
 - Select eAuth Registration
 - Select Create a Level 2 Customer Account
 - Complete the form and click “Continue”
 - Then make and attend an appointment with a Local Registration Authority to validate your identity
- **USDA employees and contractors**, follow the instructions on <https://www.eauth.usda.gov/MainPages/eauthEmployeeCreateAccount.aspx>

Download New User Access Request Form

- Go to <http://www.aphis.usda.gov/business-services/fmmi>

Note: APHIS manages system access for APHIS and FAS employees

- Click *Access for New Users* (in the Key Information section)
- Download a copy of *New User Request*

Recommended: also download *APHIS System Access Guide* for additional details on requesting access

Complete FMMI Training and Registration

Because Grantor is accessed through FMMI, all Grantor users must complete the following four required FMMI introductory courses (available by going to <http://www.aphis.usda.gov/business-services/fmmi> and then clicking *Access for New Users*):

- A. FMMI Overview Training
- B. ECC Training
- C. Master Data Training
- D. General Ledger Training

Once you have completed these trainings, register with FMMI through the following two steps:

- A. Go to <http://info.fmmi.usda.gov/>
- B. Click Login/Enroll and follow the prompts

Do not check the “Accessibility” block unless you are a user with special needs

Complete Introduction to Grantor and Submit New User Request Form

- Complete the Introduction to Grantor training course
 - Currently in progress
 - Make sure to close out the course properly in AgLearn in order to gain credit

- Submit form
 - Complete the *New User Request* form and have your supervisor confirm that you have **requested the appropriate role and program** for your job responsibilities and **completed all required introductory training** courses
 - Submit the completed form to aphis-mrpbsfmdsecurity@aphis.usda.gov

Complete Any Additional Required Training Courses

- Your [AgLearn](#) to-do list will be updated with training courses required for your Grantor role

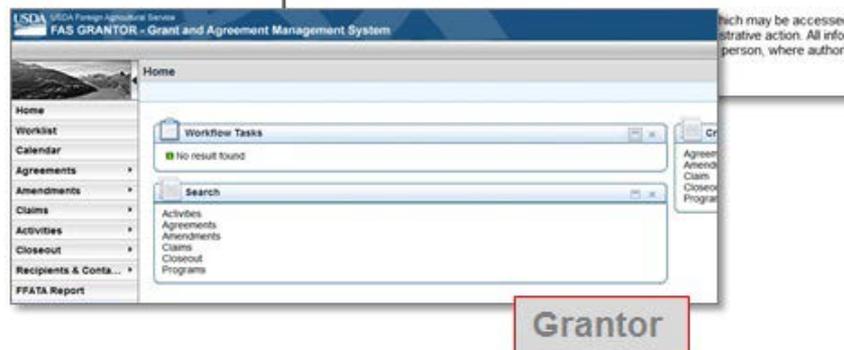
Note: may take up to three business days after submitting your *New User Request* form

- Complete all required training courses
- Optionally, see the FAS SharePoint site under the OCOO tab in the [Grants and Agreements division page](#) for downloadable course presentations and additional training materials
- Contact the Grantor Help Desk with any questions: GrantorHelpDesk@fas.usda.gov

Log in to Grantor (1 of 2)

Grantor is an enterprise solution with the following four attributes:

- A. Web-based access
- B. Single sign-on integrated with eAuthentication
- C. The CRM application is launched from the FMMI portal
- D. Access is granted based on role





Log in to Grantor (2 of 2)

Grantor is accessed through FMMI, which is available via a web portal

- Open Internet Explorer
 - Ensure that the pop-up blocker is off
 - No additional desktop client software is required
- Access the FMMI website, <http://info.fmmi.usda.gov/>, to launch the application
- Sign on to FMMI using your eAuthentication username and password by clicking the “Login/Enroll” link on the “FMMI Portal” section
 - Integration with eAuthentication means that signing into FMMI also allows you to access other USDA applications like AgLearn
 - Your FMMI and Grantor role(s) determine what sections of the system you see
- Upon logging in to FMMI, select the “Grantor Management” tab (at right in the header). This will launch the Grantor application in a separate window

Understanding the User Interface Screen

Sections of the user interface screen are labeled below. Each of these sections is described in subsequent slides.

The screenshot shows the user interface for the FAS GRANTOR - Grant and Agreement Management System. The interface is divided into three main sections:

- Header Area:** Located at the top, it includes the system title, user name ("Hello,"), and system news.
- Navigation Panel:** Located on the left side, it contains a vertical menu with options such as Home, Worklist, Calendar, Agreements, Amendments, Claims, Activities, Closeout, Recipients & Conta..., and FFATA Report. Below the menu is a "Recent Items" section listing various grant numbers.
- Work Area:** The main content area on the right, which contains several panels:
 - Workflow Tasks:** A panel showing "No result found".
 - Search:** A panel with a search bar and a list of search results including Activities, Agreements, Amendments, Claims, Closeout, and Programs.
 - Create:** A panel with a "Create" button and a list of options: Agreements, Amendment, Claim, Closeout, and Programs.

Header Area

The screenshot shows the header area of the USDA FAS GRANTOR - Grant and Agreement Management System. The header is highlighted with a red box and contains the following elements:

- USDA Foreign Agricultural Service logo and text.
- System title: FAS GRANTOR - Grant and Agreement Management System.
- User greeting: Hello, [Name].
- System News link.
- Search bar with "Saved Searches" dropdown, "Go" button, and "Advanced" link.
- Navigation links: Home, Back, and a search icon.

The main content area below the header includes a sidebar with navigation links (Home, Worklist, Calendar, Agreements, Amendments, Claims, Activities, Closeout, Recipients & Conta..., FFATA Report) and a "Recent Items" list. The main content area displays three panels: "Workflow Tasks" (No result found), "Search" (Activities, Agreements, Amendments, Claims, Closeout, Programs), and "Create" (Agreements, Amendment, Claim, Closeout, Programs).

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 user's 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 content of the work area reflects the roles of the user and the work centers in the user's Navigation Panel.

The screenshot displays the 'FAS GRANTOR - Grant and Agreement Management System' interface. The navigation panel on the left includes sections for 'Home', 'Worklist', 'Calendar', 'Agreements', 'Amendments', 'Claims', 'Activities', 'Closeout', 'Recipients & Conta...', and 'FFATA Report'. Under 'Recent Items', the following items are listed: RC:1600060137, AG:6000153, AG:6000142, AG:6000161, and AG:6000160. The main work area is highlighted with a red border and contains three panels: 'Workflow Tasks' (No result found), 'Search' (Activities, Agreements, Amendments, Claims, Closeout, Programs), and 'Create' (Agreements, Amendment, Claim, Closeout, Programs).

Module Summary

In this module, you have learned to do the following four items:

- A. Understand how to request security access to Grantor
- B. Understand how to access Grantor from the FMMI portal
- C. Explain the Grantor user interface
- D. Describe the screen structure and its components



Agenda

This training includes the following five sections:

- A. Course Introduction
- B. Module 1 – Grantor Overview
- C. Module 2 – User Roles and Training
- D. Module 3 – Access and Basic Navigation
- E. Course Summary**

This section includes the Course Summary

Course Summary

In this course, you have learned the following:

- Module 1 – Grantor Overview
 - Background and process areas
 - Benefits and goals
 - Implementation process
- Module 2 – User Roles and Training
 - Business activities for various roles
 - Training offerings and requirements by role
 - How to access training materials
- Module 3 – Access and Basic Navigation
 - How to request security access
 - How to access Grantor from the FMMI portal
 - Grantor user interface
 - Screen structure and components





Congratulations!

You have completed GM 101 – Introduction to Grantor. Thank you for your time.