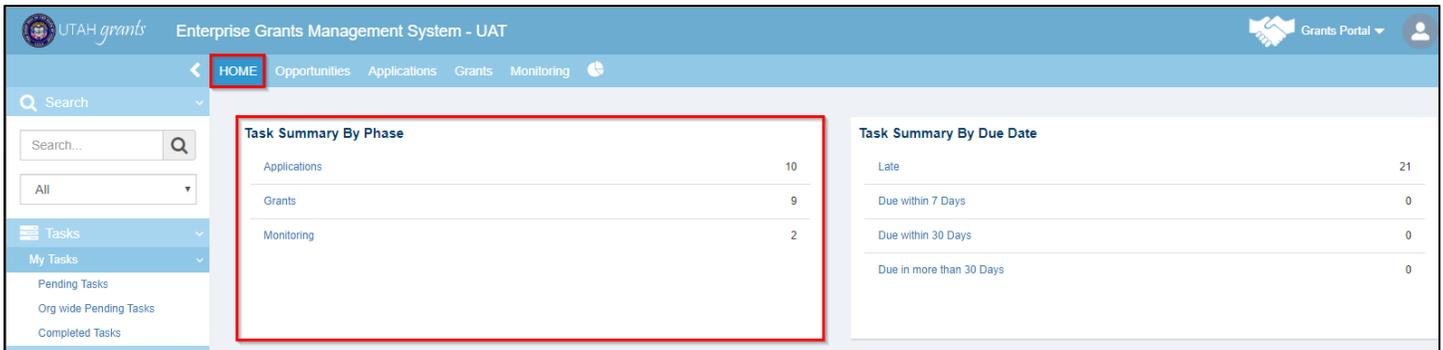


Dashboards for Subrecipient Grant Users

Four new dashboards and four new tables are available to subrecipient grant users.

1. Task Summary by Phase

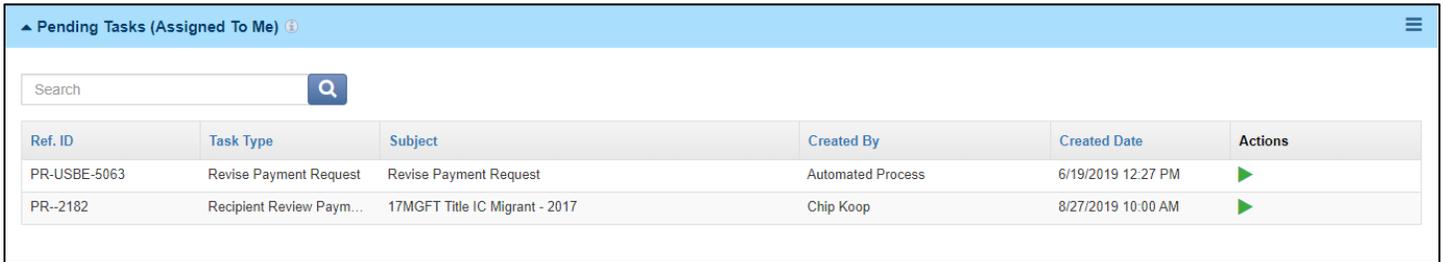
- On the Home Screen, a list of all tasks due for the user is listed by phase.
- Click on the hyperlink title for a shortcut to the task list for that phase.
- With this dashboard, it is no longer necessary to click the heading phase, then pending tasks to locate all pending tasks for the user.



The screenshot shows the 'Enterprise Grants Management System - UAT' dashboard. The 'HOME' tab is selected in the navigation bar. The 'Task Summary by Phase' dashboard is highlighted with a red box. It displays a table with the following data:

Phase	Count
Applications	10
Grants	9
Monitoring	2

- For Example, clicking on the Monitoring phase within this dashboard will show a list of all monitoring pending tasks (including pending payment requests).

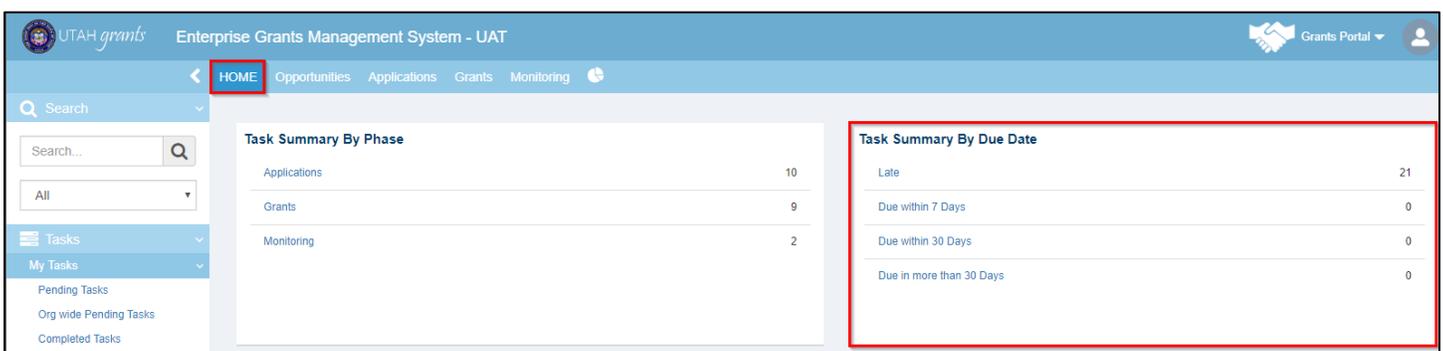


The screenshot shows the 'Pending Tasks (Assigned To Me)' dashboard. It displays a table with the following data:

Ref. ID	Task Type	Subject	Created By	Created Date	Actions
PR-USBE-5063	Revise Payment Request	Revise Payment Request	Automated Process	6/19/2019 12:27 PM	▶
PR--2182	Recipient Review Paym...	17MGFT Title IC Migrant - 2017	Chip Koop	8/27/2019 10:00 AM	▶

2. Task Summary by Due Date

- On the Home Screen, a list of all tasks is listed by due date.
- Click on the hyperlink title for a shortcut to the task list for list of all tasks that are pending for the period selected.
- With this dashboard, users can monitor tasks that have been pending their approval for a given period.
- Please note: once a task is generated, it is automatically due in 7 days. This is not the same as an application deadline.



The screenshot shows the 'Enterprise Grants Management System - UAT' dashboard. The 'HOME' tab is selected in the navigation bar. The 'Task Summary by Due Date' dashboard is highlighted with a red box. It displays a table with the following data:

Due Date Category	Count
Late	21
Due within 7 Days	0
Due within 30 Days	0
Due in more than 30 Days	0

3. Organization Wide Pending-Tasks

- On the Home Screen, a link to the report of all pending tasks for the User's organization is listed under the Task Menu (on the left task pane)

The screenshot shows the 'Enterprise Grants Management System - UAT' interface. On the left, a navigation menu is visible with 'Org wide Pending Tasks' highlighted in red. The main content area is divided into two sections: 'Pending Tasks (Assigned To Me)' and 'Pending Tasks (Assigned By Me)'. Both sections show a search bar and a table with columns for 'Ref. ID', 'Task Type', 'Subject', 'Created By', and 'Created Date'. Both tables currently display 'No records found'.

- Use the page navigation toolbar to view up to 100 records and to move between pages
- Use the User Name search to search pending tasks by a specific user.
- Please Note: Applications for Formula Grants are published to all users as a pending task. The application will show as a pending task for all users until it is owned. At which time, all pending tasks will be dismissed, and user must manage the completion of the application by the application deadline.

List of All Tasks

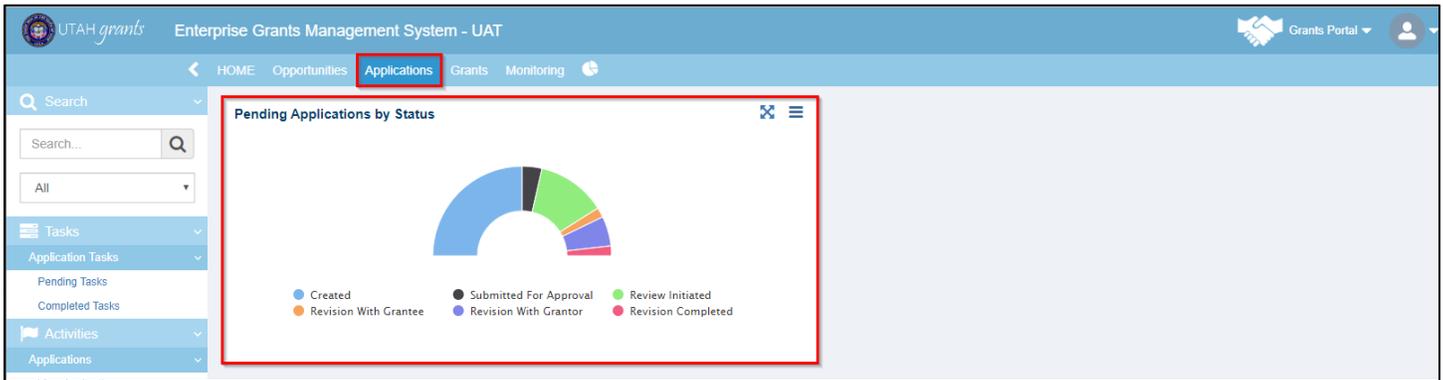
Page Size: 25 | << | 1 - 10 | >>

User Name: Search Clear

EGMS Id	Subject	Due Date	Assigned To
AR-3366	Revise Amendment Request	6/18/2019	Chip Koop
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Barry Beckstrand
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Blaine Edman
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Carolyn Merrill
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Carrie Whitney
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Diane Bartlome
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Garrick Peterson
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Joe Backman
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Jackie Ketchersid
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Jana Stutz
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Kip Bromley
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Chip Koop
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Linda Gardner
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Maritza Monterrosa
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Michelle Price
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Rachelle Bolingbroke

4. Pending Applications by Status

- On the Applications Screen, a donut chart showing pending applications by status is displayed.
- Hovering over the slice will show the number of items in that status.



- Click on the slice to show detail of the pending applications within the status selected.
- From this data, you can select “View” to be taken directly to the application.

Applications in Status: Created

ID	Applicant Organization	Program Title	Created Date	Action
AP-400-3378	Alpine School District	202FT-NEW Title IIA - Formula Flow Through	2019-05-29 18:24:31	View
AP-400-3709	Alpine School District	REI_FF3_2021	2019-07-02 19:45:44	View
AP-400-3713	Alpine School District	REI_FF4_2021	2019-07-03 15:34:05	View
AP-400-3729	Alpine School District	REI_FF2_2015	2019-07-23 18:42:54	View
AP-400-3734	Alpine School District	REI_FF1_2020	2019-07-24 14:05:38	View
AP-400-3823	Alpine School District	Title 1A - Testing	2019-10-09 17:55:35	View
AP-400-3827	Alpine School District	LSA_2015	2019-10-10 15:40:22	View
AP-400-3831	Alpine School District	REI_FF_MOE_2020	2019-10-18 18:41:35	View
AP-400-3835	Alpine School District	REI_FF_MOE1_2020	2019-10-23 20:24:05	View
AP-400-3839	Alpine School District	REI_FF_MOE1_2020	2019-10-23 20:24:11	View
AP-400-3843	Alpine School District	REI_FF_MOE1_2020	2019-10-23 20:24:14	View
AP-400-3847	Alpine School District	20T1FT Title IA	2019-10-28 18:46:28	View
AP-400-3909	Alpine School District	20T1FT Title I Part A	2019-10-28 20:11:30	View
AP-400-3929	Alpine School District	Title4_testing_2019	2019-11-07 15:09:01	View

Close

- Click on Enhanced View or Menu: Show All Data links  to get further details on all data associated with the dashboard.

5. Applications table

- On the Applications Screen, a table showing Status, when the Application was Submitted, and the Application Deadline is displayed.
- You can sort the information on this table by clicking on the column headings.
- For any applications that were not submitted, the Submitted On field will be blank.

Title	Internal Approver	Status	Submitted On	Application Deadline	Actions
REI_FF_DEC5_2015 - 2015	Robert Smith	Submitted to Grantor	12/5/2019 10:09 AM	12/27/2019 11:58 AM	
204AFT - Title IVA - Studen...	Robert Smith	Submitted For Approval	11/19/2019 1:12 PM	5/30/2020 4:00 PM	
Testing 92719	Robert Smith	Submitted For Approval	9/27/2019 1:57 PM	10/9/2019 11:16 AM	
REI_FF_2021 - 2021	Robert Smith	Submitted to Grantor	9/4/2019 10:58 AM	10/2/2019 4:00 PM	
REI_SF0_2018 - 2018	Robert Smith	Submitted to Grantor	8/28/2019 1:54 PM	9/30/2019 1:27 PM	
REI_FF0_2018 - 2018	Samuel Jarman	Submitted to Grantor	8/28/2019 11:36 AM	9/30/2019 1:27 PM	
Test 4 5 6	Samuel Jarman	Rejected	8/12/2019 2:11 PM	8/16/2019 4:00 PM	
Testing 1 2 3	Samuel Jarman	Withdrawn	8/12/2019 1:55 PM	9/9/2019 4:00 PM	
REI_SF5_2021 - 2021	Chip Koop	Submitted to Grantor	8/2/2019 1:45 PM	8/23/2019 2:06 PM	
REI_FF5_2021 - 2021	Robert Smith	Submitted to Grantor	8/2/2019 1:42 PM	9/19/2019 4:00 PM	
REI_SF4_2021 - 2021	Robert Smith	Submitted to Grantor	8/2/2019 12:57 PM	8/23/2019 2:06 PM	
REI_SF2_2021 - 2021	Chip Koop	Revision With Grantee	8/2/2019 12:35 PM	8/23/2019 2:06 PM	
NR Fed-Comp Retest Emails	Robert Smith	Revision With Grantor	8/2/2019 12:15 PM	8/3/2019 3:00 PM	

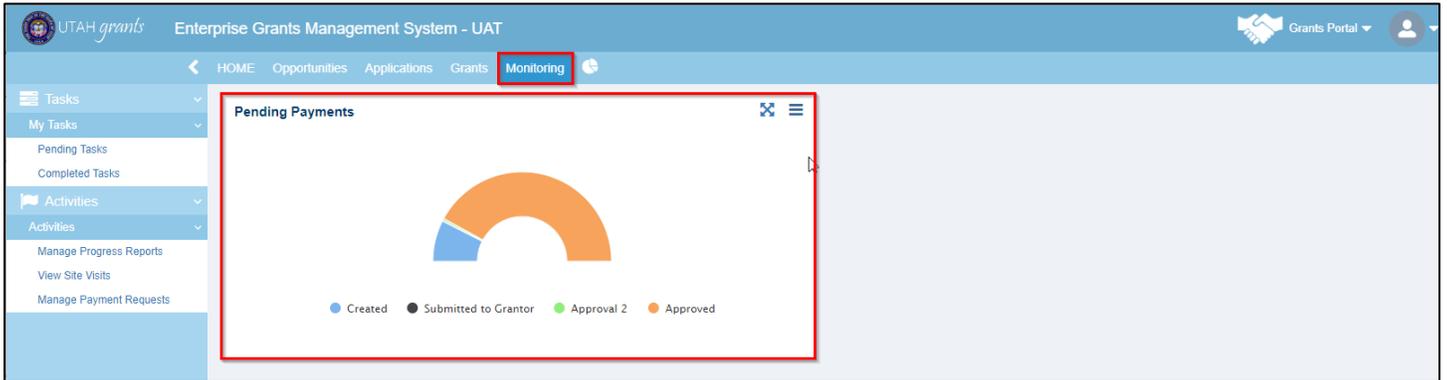
6. All Grants table

- On the Grants Screen, a table showing Payment Types (Reimbursement Required, Lump-Sum, and App 1/12) is displayed.
- You can sort the information on this table by clicking on the column headings.
- This table shows the Project Period, the Status of the program, Total Amount Awarded, and the Remaining Amount by program.

Title	Organization Name	Project Period	Payment Type	Status	Total Active Award Amount	Remaining Amount	Actions
REI_FF_DEC5_2...	USBE	1/4/2020 - 4/30/2021	Reimbursement Re...	Active	\$100.00	\$0.00	
17MGFT Title IC ...	USBE	7/1/2016 - 9/30/2018	Reimbursement Re...	Active	\$10,088.54	\$5,173.02	
19STPD Professi...	USBE	7/1/2018 - 6/30/2019	Reimbursement Re...	Active	\$1,144.28	\$0.00	
19SUPV Suicide ...	USBE	7/1/2018 - 6/30/2019	Reimbursement Re...	Active	\$0.00	\$0.00	
20PQP Early Liter...	USBE	7/1/2019 - 7/1/2020	1/12th	Active	\$0.00	\$0.00	
REI_FF2_2021 - ...	USBE	5/30/2019 - 2/10/2021	Reimbursement Re...	Active	\$700.00	\$0.00	
18MGFT Title IC ...	USBE	7/2/2017 - 9/30/2019	Reimbursement Re...	Active	\$23,385.05	\$2,601.52	
REI FedComp Alp...	USBE	5/29/2019 - 6/30/2019	Reimbursement Re...	Active	\$1,581.02	\$1,571.02	
20PUJ Enhancem...	USBE	7/1/2019 - 6/30/2020	1/12th	Active	\$900,000.00	\$900,000.00	
LSNA GT-REI_LS...	USBE	5/29/2019 - 4/13/2021	Lump-sum	Active	\$200.00	\$0.00	
MSP GT-REI_MS...	USBE	5/16/2019 - 3/31/2020	1/12th	Closed/Completed	\$0.00	\$0.00	
REI_FF_2021 - 2021	USBE	5/30/2019 - 2/10/2021	Reimbursement Re...	Active	\$1,400.00	\$1,400.00	
REI_FF0_2021 - ...	USBE	5/30/2017 - 2/11/2021	Reimbursement Re...	Active	\$0.00	\$0.00	

7. Pending Payment Requests – USBE

- On the Monitoring Screen, a donut chart showing pending payment requests by status is displayed.
- Hovering over the slice will show the number of items in that status.



- Click on the slice to show detail of the pending payment request within the status selected.
- From this data, you can select “View” to be taken directly to the payment request.

Payment Requests- DataSelected- Created					
Award Title	Recipient Organization	Owner	Approver	Requested Amount this Action	Action
MSP AD-- GRADES_1_12_2019-010-2019-4	Alpine School District	Jaime Barrett		\$17,100,864.10	View
MSP AD-- KINDERGARTEN_2019-010-2019-4	Alpine School District	Jaime Barrett		\$751,134.38	View
MSP AD-- PROFESSIONAL_STAFF_2019-010-2019-3	Alpine School District	Jaime Barrett		\$1,766,264.32	View
MSP AD-- SCHOOL_NURSE_2019-010-2019-2	Alpine School District	Jaime Barrett		\$8,810.78	View
MSP AD-- ENHANCEMENT_FOR_ACCEL_APPLIED_010-2019-1	Alpine School District	Jaime Barrett		\$24,035.42	View
MSP AD-- SPECIAL_EDUCATION_IMPACT_AID_010-2019-1	Alpine School District	Jaime Barrett		\$55,970.89	View
MSP AD-- SPECIAL_EDUCATION_SELF_CONTAINED_010-2019-1	Alpine School District	Jaime Barrett		\$420,599.63	View

8. Monitoring Schedule for all Active Grants table

- On the Monitoring Screen, displayed is a table showing Payment Types (Reimbursement Required, Lump-Sum, and App 1/12).
- You can sort the information on this table by clicking on the column headings.
- This table shows the Grant Period, Payment Type, Total Amount Awarded, and Status.

Enterprise Grants Management System - UAT

Grants Portal

HOME Opportunities Applications Grants **Monitoring**

Tasks
My Tasks
Pending Tasks
Completed Tasks
Activities
Activities
Manage Progress Reports
View Site Visits
Manage Payment Requests

Monitoring Schedule for all Active Grants

This Section Manages Post Award Activities for Grant as below:

Search

Title	Grantor Organization	Grant Period	Payment Type	# Awards	Total Active Award Amount	Status	Actions
REI_FF2_2021 - 2021	USB E	5/30/2019 - 2/10/2021	Reimbursement Required	6	\$700	Active	
19PQX USTAR - 2019	USB E	7/1/2018 - 10/15/2019	Reimbursement Required	1	\$473,600	Active	
19SUPV Suicide Prev - Secondary - ...	USB E	7/1/2018 - 6/30/2019	Reimbursement Required	2	\$0	Active	
REI_FF0_2018 - 2018	USB E	5/30/2017 - 2/11/2021	Reimbursement Required	2	\$0	Active	
18STAC IDEA St Level Activities Pres...	USB E	7/1/2018 - 6/30/2019	Reimbursement Required	1	\$15,000	Active	
18IMM Title IIIA - Immigrant - 2018	USB E	7/1/2017 - 9/30/2019	Reimbursement Required	1	\$28,698.89	Active	
18FTFL IDEA School Age - Flow Thro...	USB E	7/1/2017 - 9/30/2019	Reimbursement Required	1	\$5,043,732.21	Active	
REI_FF 2021 - 2021	USB E	5/30/2019 - 2/10/2021	Reimbursement Required	2	\$1,400	Active	
19STPD Professional Development f...	USB E	7/1/2018 - 6/30/2019	Reimbursement Required	3	\$1,144.28	Active	
19PUO Digital Teaching and Learning...	USB E	7/1/2018 - 12/31/2019	Reimbursement Required	1	\$2,221,085.66	Active	