Exercise Guide

Course Name: FIN220 Grant Management (Grantor)

Exercise Guide

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Unit 1 – MAGIC Overview

There are no exercises for Unit 1.

Unit 2 – CRM Web User Interface – Access and Navigation

Exercise 2.1 – CRM Basic Navigation and Tour

Scenario Objectives: You need to access CRM to perform Grant Management tasks.

Required Data

Task	Additional Information
Initial Screen	**SAP NetWeaver Portal**
Enter Web Address	https://tng.magic.ms.gov
Initial Screen	**SAP NetWeaver Portal**
Login using provided credentials 1. Enter User 2. Enter Password	 [Training User Username] [Training User Password]
3. Click Log On	
4. What name is displayed in the upper right corner, adjacent right to **Welcome?**	
Initial Screen	**Employee Overview – State of Mississippi – MAGIC Portal**
5. Click  e-Grants	
6. Click e-Grants Application	
7. Click the business role link associated with Program Manager	*Note: After go-live, you will be automatically logged in with your designated business role.*

What is the text at the top left header, directly adjacent to SAP ? Program Manager	
What is the Work Center Header text?	
8. Click **Programs** on the navigation bar	
What is the Work Center Header text?	
9. Name the displayed assignment blocks	
10. Click **Programs** ▸ on the navigation bar to execute the menu path:	Programs → Programs
What is the Work Center Header text?	
11. Click **Agreements** on the navigation bar	
What is the Work Center Header text?	
Mentally note the displayed assignment blocks	
What is listed in the Search assignment block?	
12. Click the **Agreements** ▸ on the navigation bar	
What are the displayed options of the menu path?	Change Requests, etc Agreements Cange Request Forms. ECC Funds Reservation *Note: These options open the search function for each object.*
13. Click the **Agreements** ▸ on the navigation bar to execute the menu path:	Agreements → Change Request Forms
14. What is the Work Center Header text?	
Perform the following in the Work Center Header Section: 15. Place the mouse cursor over Back What is the displayed control tip text?	

16. Place the mouse cursor over ▾ (next to Back) What is the displayed control tip text? 17. Click ▾ 18. Select Home 19. Place the mouse cursor over ➡ What is the displayed control tip text? 20. Place the mouse cursor over ▾ What is the displayed control tip text? 21. Click ▾ Select Search: Change Request Form 22. Click Home on the navigation bar	Home Search: Change Request Form
23. Click Programs in the Search assignment block	
What is the Work Center Header text?	
24. Click Search	Wide open search
How many items are displayed in the Result List?	
25. Enter Program Description criteria	*train*
26. Click Search	Wild card search
How many items are displayed in the Result List?	
27. Select Program Description Operator	Contains
28. Enter Program Description criteria	Train
29. Click Search	
30. How many items are displayed in the Result List?	
Perform the following in the Result List Section: 31. Click the 700000000100 link in the Program ID column	

What is the End Date for Program 700000000100?	
32. Click Back	
33. Click Back	
34. What is the top item listed in the Recent Items Section? Recent Items	
35. Click the 700000000100 link in Recent Items	
36. Click Home on the navigation bar	

Unit 3 – Grantor Programs

Exercise 3.1 – Create Grantor Program (Program Manager)

Scenario Objectives: You need to create a Grantor Program for the Fresh Fruits and Vegetables program.

Required Data

Task	Additional Information
Initial Screen	**Employee Overview – State of Mississippi – MAGIC Portal**
1. Click e-Grants Application	
2. Click the business role link associated with Program Manager	*Note: After go-live, you will be automatically logged in with your designated business role.*
3. Click Programs in the Create assignment block	
4. If prompted, select Service Organization	50000003 Education
5. Enter Program ID	[see data sheet]

6. Enter Description	Fresh Fruits and Vegetables Program + [logon user name]
What is the Current Status?	
Who is the Employee Resp.?	
7. Select Program Type	MS Education
8. Enter Start Date	[Current Date – 1 day]
9. Enter End Date	[Current Date + 1 year]
10. Select Program Profile	SoMS Standard Profile
What is the submission setting for Appl. Submiss. Period?	
What is the submission setting for Claim Submission?	
What is the submission setting for Change Request?	
Perform the following in the Process Assignments Section: 11. Select Agreement Transaction Type 12. Select Application Transaction Type 13. Select Change Request Transaction Type 14. Select Claim Transaction Type 15. Double Click in Web Form next to Application or click the and Select Application Web Form 16. Double Click in Web Form next to Change Request or click the and Select Change Request Web Form 17. Double Click in Web Form next to Claim or click the and Select Claim Web Form	SOMS Agreement SOMS Application SOMS Change Request SOMS Claims Z_APPFORM Z_GCRFORM Z_CLMFORM
Perform the following in Expense Types Section: 18. Click Insert 19. Select the next to Expense Catalog 20. Select the next to Expense Group 21. Select the next to Expense Type	SOMS Expense Types SOMS Modified Group codes Salaries
Perform the following in the Partners Section: 22. Click Partners to expand the section What Partner Function has already been entered?	

Perform the following in the new line item row: 23. Select Partner Function 24. Click in the Name field 25. Enter the Last Name field 26. Click Search 27. Select Name Perform the following in the new line item row: 28. Select Partner Function 29. Click in the Name field 30. Enter the Last Name field 31. Click Search 32. Select Name	Grantor Analyst Patel Jhanvi Patel Grantor Accountant Harkins Keith Harkins
33. Click Save	
What is the Current Status?	
Perform the following in the Program Details Section: 34. Click Edit 35. Select New Status	Released
36. Click Save	
37. Click (1)	
38. What is the system notification?	
39. Click Refresh	
40. Scroll down to the Process Control Section	
What is the Status ERP?	
41. Click Home	
What is the first item in the Recent Items section?	

Unit 4 – Grantor Forms

There are no exercises for Unit 4.

Unit 5 – Grantor Applications

Exercise 5.1 – Create/Submit Application Form (External User)

Scenario Objectives: You need to create and submit an application form for a Grantor program.

Required Data

Task	Additional Information
Select Business Role	External User
Initial Screen	**SOMS External User Work Center**
Initial Screen	**Employee Overview – State of Mississippi – MAGIC Portal**
1. Click e-Grants Application	
2. Click the business role link associated with External User	*Note: After go-live, you will be automatically logged in with your designated business role.*
3. Click Application Forms in the Search assignment block	
4. Enter Program ID search criteria	[Program ID from Exercise 3.1]
5. Click Search	
Perform the following in the Result List Section: 6. Click Application Form Link	[Program Description from Exercise 3.1]
What Form is displayed?	
7. Select Applicant Type	Individual
8. Select Submission Type	New

Confirm the following are pre-populated with the correct values: • Date • Program ID • Agency Name • Program Description	
Confirm the following are pre-populated with the correct values in the Applicant Information Section: • Street Number/Street Name • P.O. Box No. • City • State/Zip or Postal Code • Country/Parish • Phone Number/Fax Number	*Note: These values will pre-populate after go-live. They cannot be changed. No entry is required to complete the exercise. Proceed to the next step.* *12345 City Center Drive* *Jackson/39194* *US* *123-456-7890*
9. Click Next Page	
Note the following in the Contact Information Section: • First Name/Middle Initial/Last Name • Title or Function • Email Address • Phone Number/Fax Number	*Note: These values will pre-populate based on the user name used to logon to the Web Portal.*
10. Enter Project Name or Project Title	Child Nutrition
11. Enter Proposed Project Start Date	[Current Date]
12. Enter Proposed Project End Date	[Current Date + 1 month]
13. Enter Congressional District of Project	10
14. Enter Description of Project	Provide fresh produce for children
15. Enter TOTAL REQUSTED AMOUNT	50.00
16. Click Next Page	
17. Click ☑ I Agree	
Perform the following in the Authorized Representative Section:	Enter the below using information of your Authorized Representative. If not known, you may use your own for purposes of this exercise.

18. Enter First Name/Middle Initial/Last Name 19. Enter Title or Function 20. Enter Email Address 21. Phone Number/Fax Number	[Name] [Title or Function] [Email Address] [Phone Number/Fax Number]
22. Click Check	*Note: The Check feature performs a check on mandatory fields and tells you if there are any errors.*
23. Use the right vertical scroll bar to scroll to the top of the form	
Under "Online Grantor Application Form," are any error messages returned?	
24. Click ☑ Please check the box if you want to finally submit	
25. Click Submit	
26. What message is displayed?	
27. What is your application number?	

Unit 6 – Grantor Agreements

Exercise 6.1 – Process Application and Create Agreement (Analyst)

Scenario Objectives: You need to process an application and create an agreement.

Required Data

Task	Additional Information
Initial Screen	**Employee Overview – State of Mississippi – MAGIC Portal**
1. Click e-Grants Application	
2. Click the business role link associated with Analyst	*Note: After go-live, you will be automatically logged in with your designated business role.*

3. Click Applications in the Search assignment block	
4. Enter Application ID search criteria	[Application number from Exercise 5.1]
5. Click Search	
Perform the following in the Result List Section: 6. Click the Application ID link	[Application number from Exercise 5.1]
What text is displayed in the Work Center Header?	
What section/assignment block is displayed at the top of the Work Center?	
Perform the following in the Application Details Section: 7. Click Edit 8. Select Status *Note: This step will not be required after Go-Live. It is only required for this training course.* 9. Select Status 10. Click Save	Open In Review
11. Use the vertical scroll bar to Scroll down to the Item List Section *Note: This begins the day-to-day assessment process that you would do on an application.*	
Perform the following in the Item List Section: How many line items are listed? What is the Item No of the first line item? 12. Click the 10 link	
What text is displayed in the Work Center Header?	
What section/assignment block is displayed at the top of the Work Center?	
Perform the following in the Application Item Details Section: What is the Item No? What is the Item Category? 13. Click Edit 14. Select Expense Catalog 15. Select Expense Group 16. Select Expense Type *Note: Since you did not enter additional Expense Types in the program line item, only one expense type is available to select from the drop-down menu. If you wanted more options, you would have to add additional line items with more expense types.* What is the Start Date?	SOMS Expense Types SOMS Modified Group codes Salaries

What is the End Date? What is the Status? What is the Requested Amount? 17. Enter Eligible Amount 18. Enter Authorized Amount 19. Select Status	 50.00 50.00 Released
20. Click Back *Note: This button functions as a Save and Exit.*	
What text is displayed in the Work Center Header?	
Perform the following in the Application Details Section: What is the Status? 21. Click Edit 22. Select Status	Application Approved
23. Click Save	
What is the system notification?	
24. Click Create Agreement	
What text is displayed in the Work Center Header?	
25. Click Edit	
Perform the following in the Agreement Overview Section to change the status: 26. Select Status	Agreement In Review
27. Click Save Save	
Perform the following in the Agreement Item List Section: 28. Click the 10 link	
Review information in the Agreement Item Details section • Expense Catalog • Expense Group • Expense Type • Authorized Amount • Open Balance 29. Click Back	
Perform the following in the Agreement Overview Section: 30. Click Edit	

31. Select Status	Agreement Approved
32. Click Save *Note: After you save, this is when the fund reservation is created for the agreement.*	
What is the Agreement ID number?	

Unit 7 – Grantor Claims

Exercise 7.1 – Create/Submit Grantor Claim Form (External User)

Scenario Objectives: You need to create and submit a Grantor claim form.

Required Data

Task	Additional Information
Initial Screen	**Employee Overview – State of Mississippi – MAGIC Portal**
1. Click e-Grants Application	
2. Click the business role link associated with External User	Note: After go-live, you will be automatically logged in with your designated business role
3. Click Claim Forms in the Search assignment block	
4. Enter Agreement ID search criteria	[Agreement ID from Exercise 6.1]
5. Click Search	
Perform the following in the Result List Section: 6. Click Claim Form link	[Claim Form description of Agreement ID created in previous exercise]
Confirm the following are pre-populated with the correct values in the Basic Information Section: • Agreement ID • Program ID • Agency Name • Agreement Description • Program Description	
Perform the following in the General Claim Information Section:	

7. Valid From 8. Valid To 9. Select Payment Type	[Note date is current date] [Note date is copied from Grantor Program] Reimbursement
Perform the following in Reimbursement Request Section: 10. Reimbursement Request Amount	10.00 USD
11. Click Check	
12. Use the right vertical scroll bar to scroll to the top of the form	
Are any error messages returned?	
Click ☑ Please check the box if you want to finally submit:	
13. Click Submit	
14. What message is displayed?	
15. What is the Claim Number?	

Exercise 7.2 – Process Grantor Claim Form (Accountant)

Scenario Objectives: You need to process a Grantor claim form.

Required Data

Task	Additional Information
Initial Screen	**Employee Overview – State of Mississippi – MAGIC Portal**
1. Click e-Grants Application	
2. Click the business role link associated with Accountant	*Note: After go-live, you will be automatically logged in with your designated business role.*
3. Click Claims in the Search assignment block	
4. Enter Claim ID search criteria	[Claim Number from previous exercise]
5. Click Search	

Perform the following in the Result List Section: 6. Click Claim ID link	[Claim Number from previous exercise]
7. Click Edit in Claim Overview	
8. Select the Status	Open
9. Click Edit	
10. Select the Status	In Review
11. Click the 10 link in Item List	
12. Click Edit in Claim Item Details	
Perform the following in the Claim Item Details Section: 13. Select Expense Catalog 14. Select Expense Group 15. Select Expense Type 16. Eligible Amount 17. Authorized Amount	 SOMS Expense Types SOMS Modified Group codes Salaries 10.00 USD 10.00 USD
18. Click Back	
Perform the following in the Claim Overview Section: 19. Click Edit 20. Select Status	 Claim Approved
What is the Status of Item 10?	
21. Click Save	
22. What is the system notification?	

Unit 8 – Grantor Change Request

Exercise 8.1 – Create/Submit Grantor Change Request Form (External User)

Scenario Objectives: You need to create and submit a Grantor change request form.

Required Data

Task	Additional Information
Initial Screen	**Employee Overview – State of Mississippi – MAGIC Portal**
1. Click e-Grants Application	
2. Click the business role link associated with External User	*Note: After go-live, you will be automatically logged in with your designated business role.*
3. Click Change Request Forms in the Search assignment block	
4. Enter Agreement ID search criteria	[Agreement Number from Exercise 6.1]
5. Click Search	
Perform the following in the Result List Section: 6. Click Change Request Form	[Change Request Form of above Agreement ID]
Confirm the following values in the Basic Information Section are pre-populated and correct: • Request Date • Agreement ID • Program ID • Grantee ID • Agency Name • Agreement Description • Program Description • Grantee Name • Contact ID • Contact Name	
Perform the following in the Change Request Information Section: 23. New Valid To	[Current Date + 1 year – 1 Month]

Perform the following in the Agreement Line Item Section for Item 10: 24. New Amount 25. New Valid To	100.00 [Current Date + 1 year – 1 Month]
Perform the following in the Comments Section 26. Comments	Correcting clerical error in original Application
27. Click ☑ I agree	
28. Enter First Name/Middle Initial/Last Name	[Same as entered in Application in Exercise 5.1]
29. Enter Title or Function	[Same as entered in Application in Exercise 5.1]
30. Enter Email Address	[Same as entered in Application in Exercise 5.1]
31. Enter Phone Number/Fax Number	[Same as entered in Application in Exercise 5.1]
32. Click Check	
33. Use the right vertical scroll bar to scroll to the top of the form	
Are any error messages returned?	
34. Click ☑ Please check the box if you want to finally submit	
35. Click Submit	
36. What message is displayed?	
37. What is the Change Request number?	

Exercise 8.2 – Process Grantor Change Request Forms (Analyst)

Scenario Objectives: You need to process a Grantor change request form.

Required Data

Task	Additional Information
Initial Screen	**Employee Overview – State of Mississippi – MAGIC Portal**
1. Click e-Grants Application	
2. Click the business role link associated with Analyst	*Note: After go-live, you will be automatically logged in with your designated business role.*

3. Click Change Requests in the Search assignment block	
4. Enter Agreement ID search criteria	[Agreement Number from Exercise 6.1]
5. Click Search	
Perform the following in the Result List Section: What is the Status of the Change Request? 6. Click Change Request ID	[Change Request ID from previous exercise]
Perform the following in the Change Request Overview Section: 7. Click Edit 8. Select Status	Open
9. Select Status	In Review
10. Click Save	
Perform the following in the Partners Section: 11. Click Partners 12. Click Edit List Perform the following in the new line item row: 13. Select Partner Function 14. Click in the Name field 15. Enter the Last Name field 16. Click Search 17. Select Name Perform the following in the new line item row: 18. Select Partner Function 19. Click in the Name field 20. Enter the Last Name field 21. Click Search 22. Select Name 23. Click Save 24. What is the system notification?	Project Director Harkins Keith Harkins Authorizing official Patel Jhanvi Patel
25. Click Edit in Change Request Overview 26. Select Status 27. Click Save	Change Request Approved
28. Execute navigation bar menu path:	Agreements → Agreements

29. Enter Agreement ID criteria	[Agreement Number from Exercise 6.1]
30. Click Search	
31. Click Agreement ID	[Agreement Number from Exercise 6.1]
Review the following in the Agreement Overview Section: What is the new Authorized Amount? What is the new End Date? Do these values reflect the Change Request submission?	
32. Click Home	

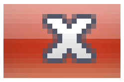
Unit 9 – Grantor Case Management and Reporting

Exercise 9.1 – Display BI Report

Scenario Objectives: You need to create and submit a Grantor change request form.

Required Data

Task	Additional Information
Initial Screen	**Employee Overview – State of Mississippi – MAGIC Portal**
1. If an initial BI error flashes, it will disappear in a second.	This may appear the initial time you access the Analytics Analytics tab**.**
2. Click click the Analytics tab to launch the BI Launchpad.	***Note: This will launch in a new window. The MAGIC Portal is still open.***
3. Select the Folders tab on the Navigation Panel to expand the folders.	***Note: You may have to click the*** Search ***tab then*** Folders ***tab again to expand the folders****.***
4. If the Panel to the right of the folders is blank, right mouse click and click “Refresh” to display the available reports list.	

5. Double-Click on the folder  and the available BI Reports will be listed.	
6. Double-click the desired report.	***Note: you may be asked to click "OK" to verify the fields in the report or "Run Query" based on the report selected***.
7. Click the  to return to the MAGIC Portal Screen.	