



Grants Management: Grantor

FIN220



Welcome & Introduction

- Instructor
- Assistant
- Experience & background
- Attendees



Course Details

Course duration is 16 hours over 2 days.

Course Prerequisites:

- NAV101 MAGIC Navigation and Basic Reporting – WebGUI
- OR
- NAV801 MAGIC Overview and Navigation – WebGUI - eLearning
- RPT801 Basic Reporting - eLearning



Class Expectations

Role of the Instructor

- To help you obtain the skills and confidence to use MAGIC in your daily work

Role of Assistant

- To help the instructor by providing one-on-one assistance when needed

Parking Lot

- Used for items that cannot be addressed immediately or require clarification



Be Considerate

Turn off or mute cell phones,
and other electronic equipment



Do not use the training
computer for non-training
purposes (access e-mail,
surf the web)

Be on-time when returning
from lunch and breaks





Please Note . . .



Course exercises and demos use data in MAGIC's Training System.

Training data was carefully selected by SMEs to represent all agencies, however:

- Training data does not look like production data.
- Training data is general—does not represent a specific agency.

Please focus on the exercises—not the data.

Training vs. Production Systems

May be cases where the training system and the production system are not exactly the same.

Differences:

- Are not significant
- Will not impact your ability to understand and use MAGIC





Course Objectives

At the end of this course, you will be able to:

- Access and navigate MAGIC
- Describe the Grantor programs
- Describe the opt-out procedure
- Identify Grantor forms
- Describe the Grantor agreements
- Identify Grantor claims and change requests
- Describe Grantor case management
- Run Grantor reports

Course Map



Unit

1 MAGIC and Grants Overview

2 CRM Web User Interface – Access and Navigation

3 Grantor Programs

4 Grantor Forms

5 Grantor Applications

6 Grantor Agreements

7 Grantor Claims

8 Grantor Change Requests

9 Grantor Case Management and Reporting

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Unit 1: MAGIC and Grants Overview



Unit Topics:

- MAGIC Overview
- Grantor Management Overview
- Grantor Lifecycle
- Key Terms and Language Crosswalk

MAGIC Finance Overview





Business Area, Fund, Functional Area

Business Area

The Business Area represents the Agency Number

The field is 4 digits and new numbers are assigned by DFA

Fund

The Fund has the same meaning as the SAAS Fund

New fund numbers are assigned by DFA based on funding sources

The field is 10 digits. Each Fund is linked to an Appropriation Unit.

Functional Area

The Functional Area identifies the Legislative control and contains the Appropriation Unit and Program

The field length is a maximum of 16 digits and consists of
Appropriation Unit (6)/ Program (2)/ Reserved (8)

Appropriation Unit / Program /Reserved XXXXXX / XX /XXXXXXXX



Grants Management Overview

Grants Management is comprised of two different areas: Grantee and Grantor

- "Grantee" is the role the State Agency fills when it is the recipient of grant funding
- "Grantor" is the role the State Agency fills when it is the granting agency of funding to sub-recipients

This course's focus is the State Agency as the Grantor, with an emphasis on Grantor Program Management.

Key Terms



Term	Definition
Business Analytics (BA)	A reporting and analysis tool that aggregates data from all modules in MAGIC.
Business Area	The agency responsible for the Grant.
Customer Relationship Management (CRM)	The component of MAGIC that provides Grantor functionality for Grants Management.
Enterprise Central Component (ECC)	The component of MAGIC that provides FI, CO, FM, and Grantee Grants Management functionality.
Enterprise Resource Planning (ERP)	Term used in the software industry to describe systems that allow an organization to run all operations and functions in one system rather than multiple systems.
Fund	Represents the source of funding <ul style="list-style-type: none">• External: Accounts for Grant funds• Internal: Accounts for all other funds
Grant	Includes the terms and conditions of the funding and administration of a sponsor's award.

Key Terms



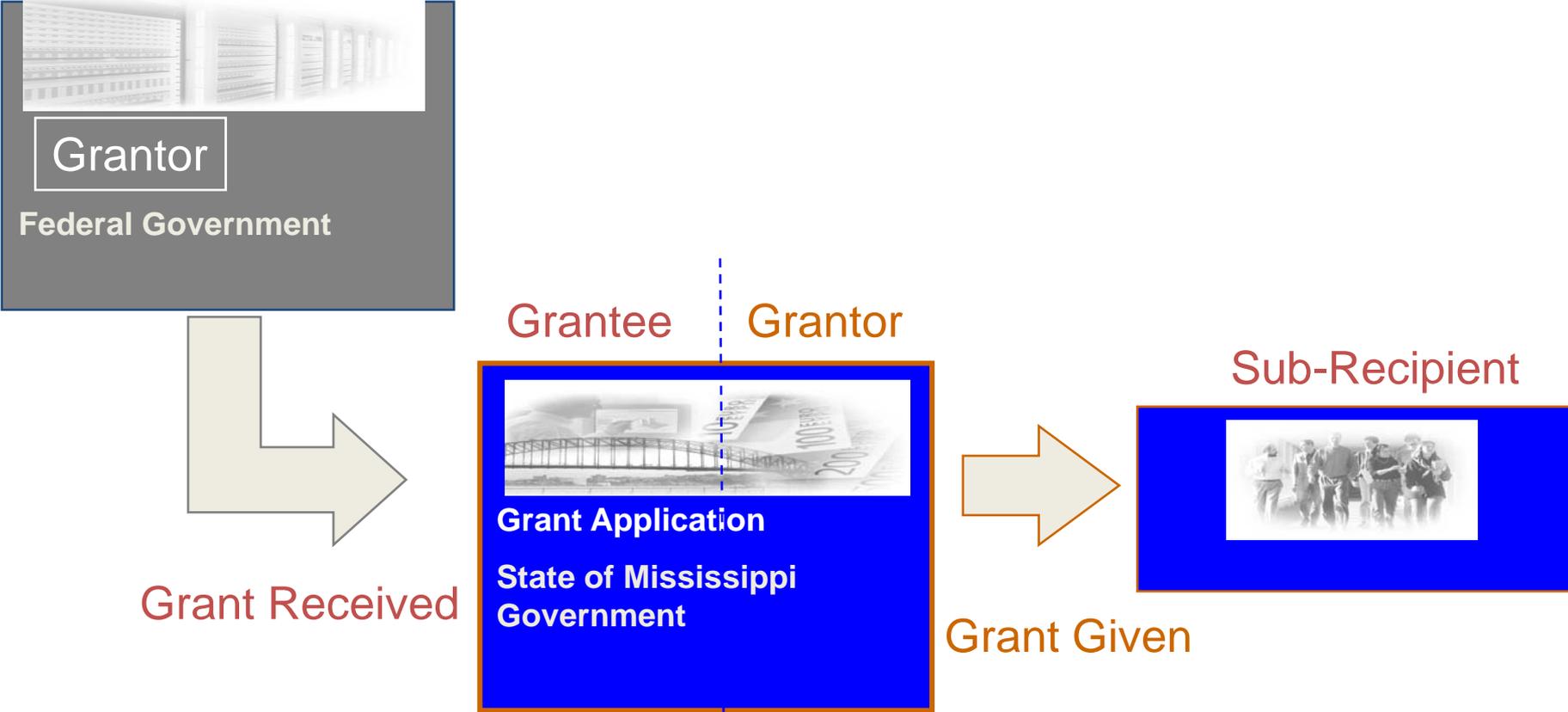
Term	Definition
Grantee	The receiving Agency, Organization, Individual, or Local Governmental Entity is the Grantee. An agency is the Grantee when it is the recipient of the money from a federal agency or other Grantor organization.
Grantor	The entity providing grant funds is the Grantor. An agency is the Grantor when it sub-grants funds to other recipients.
Grantor Program	Represents a funding source for sub-recipients to carry out specified activities.
Internal Order (IO)	Used to accumulate Costs for Grants.
MAGIC	Mississippi's Accountability System for Government Information and Collaboration. Mississippi State Government's Enterprise Resource Planning (ERP) solution. Powered by SAP Public Sector® software, MAGIC replaces the State's legacy administrative systems with a fully-integrated information system.
MAGIC Portal	The MAGIC portal allows single sign-on to all the functionality of MAGIC. The portal is web-based and contains links to all components within MAGIC.

Key Terms



Term	Definition
Sponsor	Entity that provides the funding for the Grantor program.
Sponsored Class	Categorizes expenses in accordance with the sponsor's requirements for reporting.
Sponsored Program	Used to divide the grant into individual activities to meet the sponsor's funding and reporting requirements.
Sub-Recipient (Sub-Grantee)	The Organization, Individual, Local Governmental Entity, or another agency receiving grant funds from the agency that received the primary grant is the "Sub-recipient" or the "Sub-Grantee"

Grantor / Grantee / Sub-Recipient Relationship



Grants Management Benefits

Grantor Program Management enables us to:

- Improve **Service Delivery** with quicker access to relevant information and more reliable data
- Increase **Speed and Efficiency** through automation and accurate, up-to-date information
- Increase **Transparency and Accountability** via improved management and control of public funds
- Reduce **Operating Costs** through improved business processes, increased integration



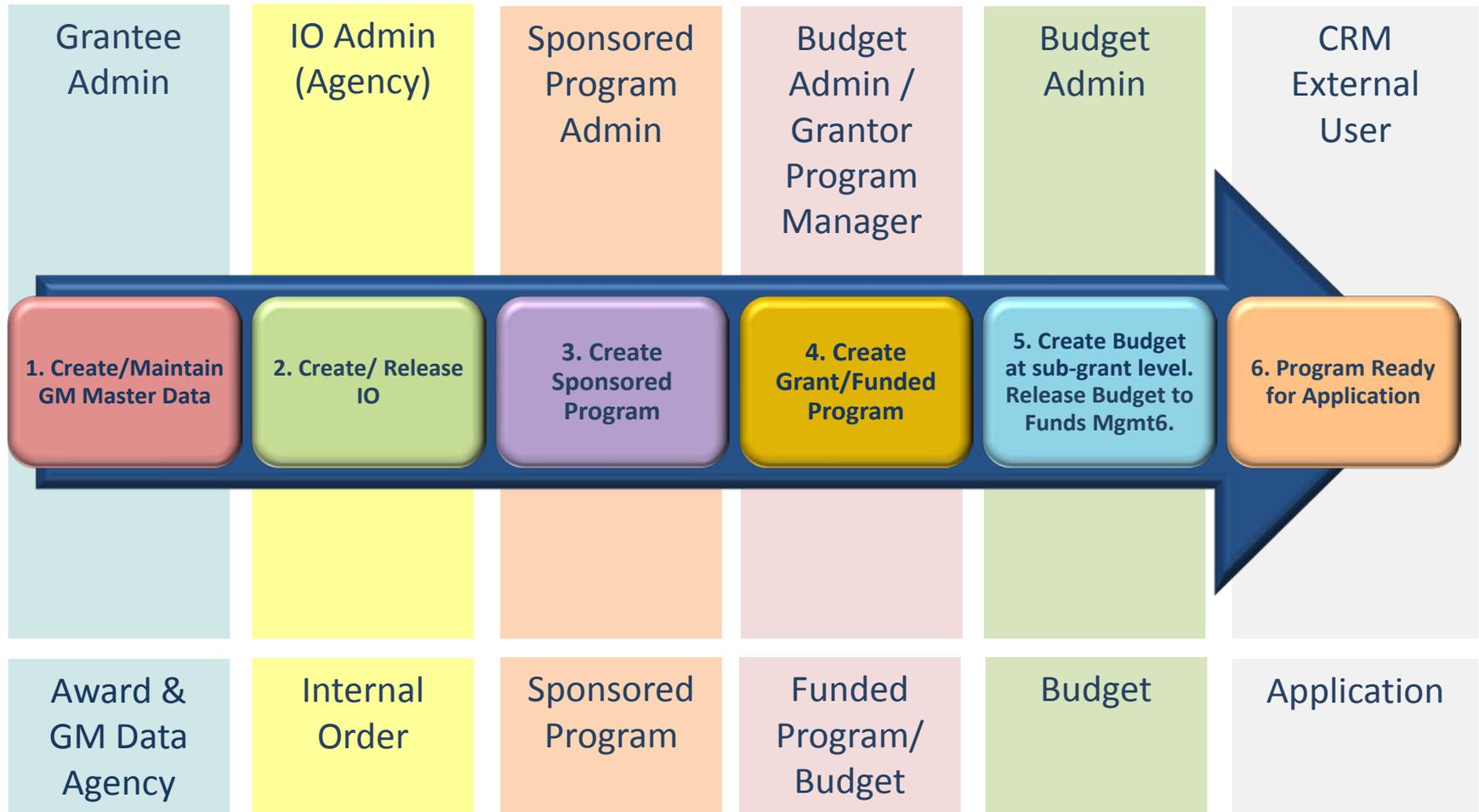


Grants Management Overview

Grant Management leverages data from other business functions in MAGIC

- General Ledger Accounts
- Internal Orders and Cost Centers
- Funds, Commitment Items and Funds Centers

Grantor Lifecycle – Program Setup



Grantor Lifecycle

A Grantor Program is not a static object. It has its own lifecycle that begins with its creation and ends with its closure or cancellation. During this time, the program is changed by different business transactions.



Knowledge Check



Which of the following is False?

- A. The State of Mississippi can be both a Grantee and a Grantor
- B. A Grantor grants funds to recipients
- C. A Sub-recipient receives funds from its Grantor
- D. A Grantor receives funds from its Grantee

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Unit 2: CRM Web UI – Access and Nav



Unit Topics:

- Logging On
- Using Business Roles
- Links and Menus
- Personalization
- Icons and Shortcuts
- Searching

Logging On

To log on to the e-Grants Work Center...

1. Log into the MAGIC Web Portal

2. Select e-Grant tab



3. Click e-Grants
Application link



4. Click appropriate
business role link



Select a business role:

- [ZGRNT_ACC-SOMS Accountant](#)
- [ZGRNT_ANA-SOMS Analyst](#)
- [ZGRNTPRGMGR-SOMS Program Manager](#)

Logging On

A successful logon displays the CRM Work Center home screen for the selected role:



Grantor Business Roles

External User

Potential sub-recipients who log in to CRM with the intention of applying for a grant with a Grantor state agency

Grantor Analyst

Agency employee who reviews, approves and disapproves applications submitted by External Users

- Responsible for creating and managing the agreement created from the approved application
- Reviews and manages change requests



Grantor Business Roles (cont.)

Panelist

This role is specific to the Arts Commission, the only agency currently using “Full” Grantor functionality

- Tasked with reviewing and rating/grading applications for Arts
- Cannot approve or disapprove applications

Grantor Accountant

Agency employee who reviews, approves and disapproves Grantor claim forms submitted by external user

Grantor Business Roles (cont.)

Program Manager

Agency employee who oversees all aspects of agency Grantor programs

- Has the authority to create and modify Grantor programs within CRM
- Holds the same authority as the analyst and accountant and can fill in for them in their duties if the need arises

Web User Interface Elements

The CRM Web User Interface (UI) Elements:

- Business Role Work Center
 - Navigation Bar
 - Header
 - Work Center
 - Assignment Blocks

Business Role Work Center

The Business Role Work Center screen appears below.



Web User Interface Elements

The screenshot displays the SAP SOMS Program Manager web user interface. The interface is annotated with several callout boxes:

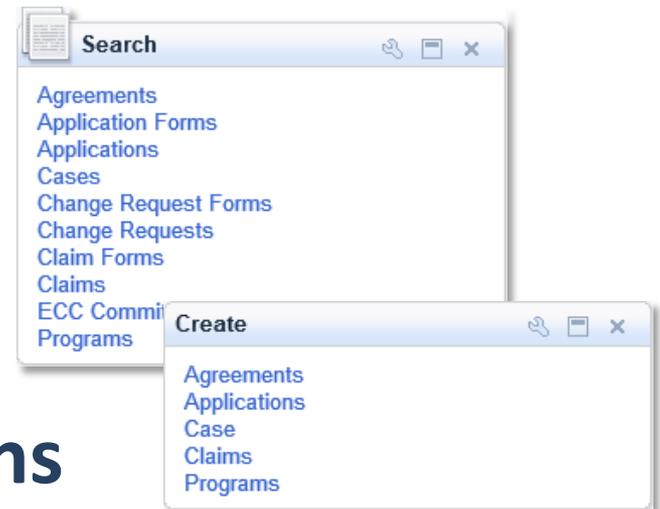
- Header:** Located at the top, containing the SAP logo, "SOMS Program Manager", and "Personalize System News".
- Navigation Bar:** A vertical sidebar on the left containing menu items: Home, Calendar, Worklist, Programs, Agreements, Applications, Claims, Accounts, Activities & Cases, Reports, and Help Center. Below these is a "Recent Items" section with two entries: "700000005000" and "7000000000050".
- Work Center Header:** A horizontal bar below the navigation bar, containing "Home", "Saved Searches", "Go", "Advanced", and "Back".
- Assignment Blocks:** A collection of task cards in the main content area, including "Today's Appointments", "Today's Tasks", "Workflow Tasks", "Search", and "Reports". Each card has a "No result found" message. The "Search" card lists various categories like Agreements, Application Forms, and Claims. The "Reports" card lists "Lifecycle: Current Overview" and "Open Items 30-60-90".
- Work Center:** A "Create" panel on the right side of the main content area, listing "Agreements", "Applications", "Case", "Claims", and "Programs".

Links and Menus



The Navigation Bar provides menu paths and links to navigate to different UI screens.

Assignment Blocks contain direct links to related UI screens and transactional functionality.



Personalization

The layout and content of the CRM UI can be customized for each individual user.

The Personalization options are accessed via two links, both located in the upper right corner of the User UI.

- Personalize hyperlink: **Personalize**

- Personalize 'Wrench' button:



Personalization

This screen shows the location of the Personalization links.

The screenshot displays the SAP SOMS Program Manager interface. At the top, the title bar includes the SAP logo, 'SOMS Program Manager', and an 'Options' dropdown. Below the title bar, there is a 'Saved Searches' section with a dropdown menu, 'Go', 'Advanced', and a trash icon. The main content area is divided into several sections: a 'Home' section with a landscape image, a 'Today's Tasks' section with a 'No result found' message, a 'Workflow Tasks' section with a 'No result found' message, a 'Search' section with a list of items including 'Agreements', 'Application Forms', 'Applications', 'Cases', 'Change Request Forms', 'Change Requests', 'Claim Forms', 'Claims', 'ECC Commitment Document', and 'Programs', and a 'Reports' section with 'Lifecycle: Current Overview' and 'Open Items 30-60-90'. A left-hand navigation menu contains links for 'Home', 'Calendar', 'Worklist', 'Programs', 'Agreements', 'Applications', 'Claims', 'Accounts', 'Activities & Cases', 'Reports', and 'Help Center'. A 'Recent Items' section at the bottom left shows two items with IDs '7000000005000' and '7000000000050'. A large white callout box with the word 'Personalize' in a blue, pixelated font is overlaid on the 'Home' section. A mouse cursor icon is shown pointing to the 'Personalize' link in the top right corner of the interface. Lines connect the callout box and the mouse cursor to the 'Personalize' link.

Personalization

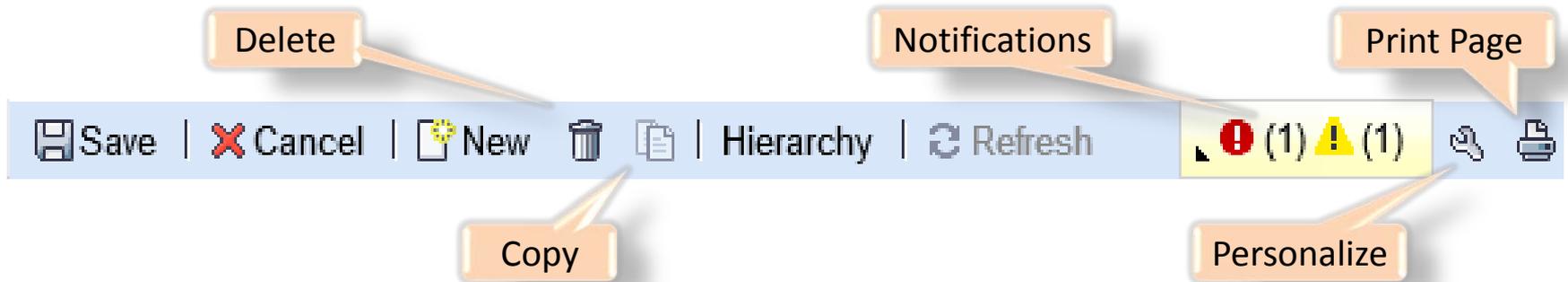
Personalize hyperlink

Use this link to personalized user information, general information (time zone, tab order, drop down list sorting, etc.), Navigation Bar links, keyboard shortcuts, homepage links and widgets, calendar and email settings.

Personalize 'Wrench' Button

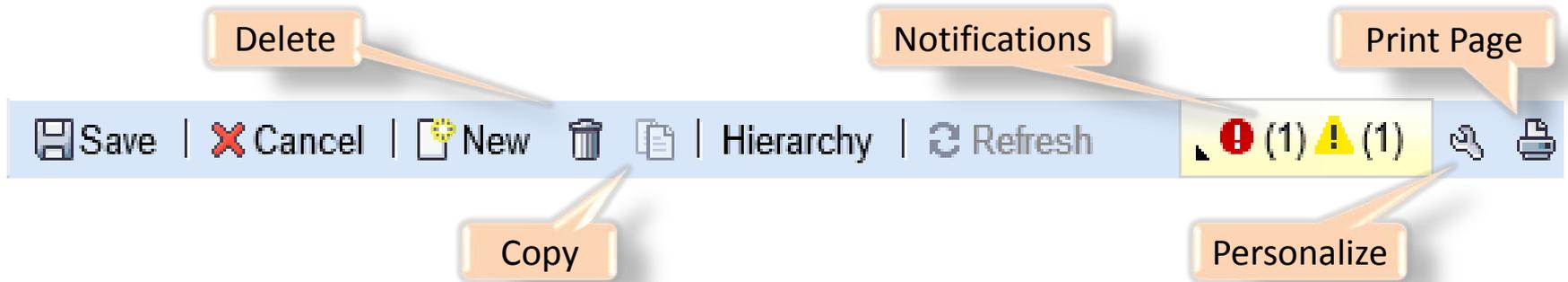
Use this button to set the functionality and location of Assignment Blocks.

Icons and Shortcuts



- **Save:** Save current changes and entries
- **Cancel:** Cancel unsaved changes and entries
- **New:** Create new object
- **Delete:** Delete current object
- **Copy:** Copy current object (especially useful at year change)

Icons and Shortcuts (cont)



- **Refresh:** Refresh all displayed data to reflect current entries
- **Notifications:** System Notifications to user
- **Personalize:** Customize which assignment blocks are displayed and where they appear. This icon, when in an assignment block header, is used to similarly manage the links within the assignment block
- **Print Page:** Display current page in an easy-to-print format

Icons and Shortcuts (cont)



- **Back (left arrow):** “Back to Previous Page” (does **NOT** save)
- **Back (green check):** Save and back to previous page
- **Forward to Next Page:** Forward to next page (does **NOT** save)
- **Show Page History (Forward) Menu:** Displays list of recently visited pages.

Searching Functions

Use the Search functionality to find specific Objects, Forms, Partners, generic terms

Search Types:

- **Run time only Searches:** Search criteria are entered and applied to the record population. Results are displayed. Variety of data/elements that can be searched (persons, objects, forms, etc.)
- **Saved Searches:** A run time only search that was previously saved. Recalled via a user-entered name under which it was saved.

Searching

Run Time Only searches are accessed via Search Assignment Blocks (SABs)

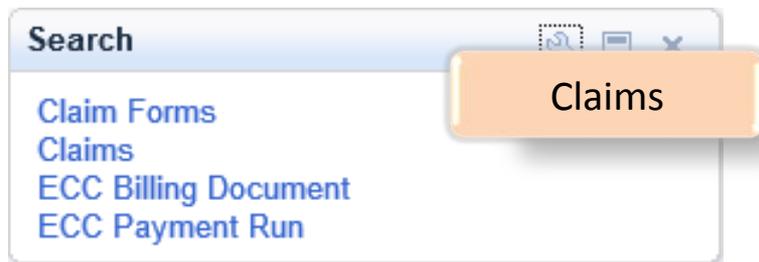
- SABs contain links to search pages for specific types of Objects and Forms available to the Business Role of the user
- A “Master” Search Assignment Block is located on the user Home page
- Each of the following pages has its own SAB: Programs, Assessments, Applications, Claims, Accounts, Activities & Cases, and Help Center

Search Assignment Blocks

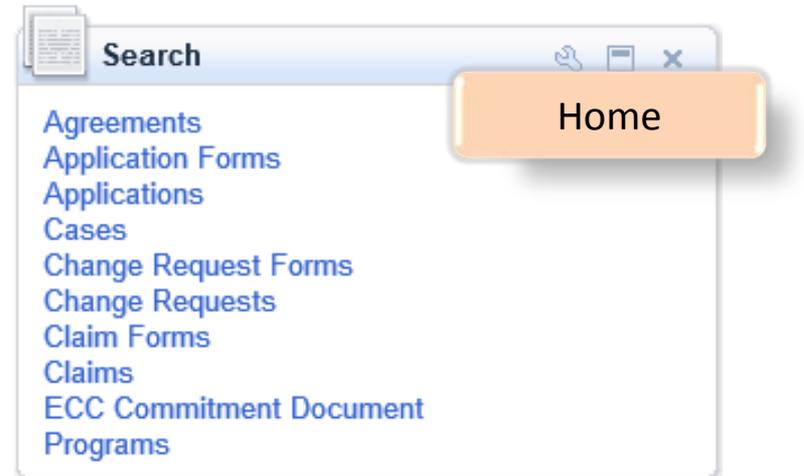
Each Search Assignment Block contains only links relevant to it



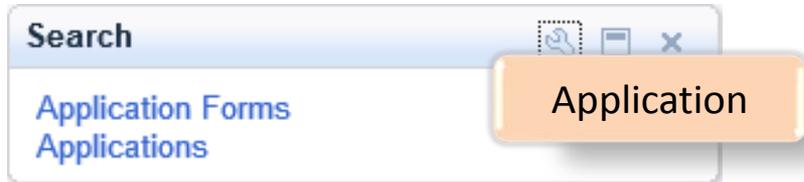
A search window titled "Search" with a list of links: Agreements, Change Request Forms, Change Requests, and ECC Funds Reservation. An orange callout box labeled "Agreements" is positioned over the list.



A search window titled "Search" with a list of links: Claim Forms, Claims, ECC Billing Document, and ECC Payment Run. An orange callout box labeled "Claims" is positioned over the list.



A search window titled "Search" with a list of links: Agreements, Application Forms, Applications, Cases, Change Request Forms, Change Requests, Claim Forms, Claims, ECC Commitment Document, and Programs. An orange callout box labeled "Home" is positioned over the list.



A search window titled "Search" with a list of links: Application Forms and Applications. An orange callout box labeled "Application" is positioned over the list.

Search Page Elements

Example: Grantor Programs Search Page

The screenshot shows a search interface with the following elements:

- 1**: Search Criteria section header.
- 2**: Search criteria rows, each with a dropdown menu, an operator, and a search term.
- 3**: Search criteria input fields.
- 4**: Search and Clear buttons.
- 5**: Result List header.
- 6**: Save Search As field and Save button.

Annotations on the right side:

- Copy Line**: Callout pointing to the search criteria input fields.
- Remove Line**: Callout pointing to the search criteria rows.

Maximum Number of Results: 100

5 Result List: 2 Programs Found

Program ID	Description	Program T...	Service Or...	Status	Start Date	End Date
70000000...	CWGrantor...	MS Menta...	Mental He...	Released	07/01/2013	07/31/2014
70000000...	CW Grant...	MS Menta...	Mental He...	Released	07/22/2013	07/25/2014

Saved Search

Save search criteria to create a Saved Search for easy recall:

Search Criteria [Hide Search Fields](#)

Program Description	is	"Train"	+	-
Program Description	contains	Train	+	-
Program Description	starts with	CW	+	-
Service Organization	is		+	-
Program ID	is		+	-
Program Type	is	MS Mental Health	+	-

Maximum Number of Results:

Save Search As

Name/Label of Saved Search

Saved Search



Perform a saved search:

- Select the saved search in the Saved Searches drop-down box
- Click the **Go** button

Review/Edit a saved search:

- Select the saved search in the Saved Searches drop-down box
- Click the **Advanced** button



Status Management

Workflow and notifications in CRM are handled through the changing of statuses

- Every time status changes, everyone in Partners assignment block is notified of change
- This does two things:
 - Keeps everyone up-to-date as to what is happening
 - Lets next person in workflow line know an action needs to be taken

Keeping up with and setting correct status drives workflow in Grantor CRM

Let's Practice



Instructor Demo

Complete Exercise(s):

2.1 CRM Basic Navigation and Tour

Knowledge Check



A Grantor Analyst:

- A. Approves claims submitted by an external user
- B. Reviews applications submitted by an external user
- C. Makes the judgment to approve or reject an application
- D. Manages agreements created from approved applications
- E. All of the above
- F. B, C, and D

Knowledge Check



A Grantor Accountant:

- A. Reviews applications submitted by an external user
- B. Makes the judgment to approve or reject an application
- C. Approves claims submitted by an external user
- D. All of the above

Knowledge Check



Name two navigation objects that can be used to view Grantor Program Search Page.

- A. Navigation Bar and Favorites
- B. Favorites and Search Assignment Block
- C. Navigation Bar and Search Assignment Block
- D. Work Center Tool Bar and Notification shortcut
- E. All of the above

Knowledge Check



What statement is true of (1)  Back and (2)  Back ?

- A. Both buttons perform the same function
- B. (1) 'checks' the accuracy and completeness of user entered data
- C. (1) Saves entered data
- D. (2) Saves entered data

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Unit 3: Grantor Programs



Unit Topics:

- Overview
- Pre-requisites and Naming Conventions
- Creating a Program
- Object Assignments
- Notes
- Status Management
- Workflow



Grantor Programs

Grantor Programs allow agencies to define the policies and regulations that deliver external funding, such as:

- Defining how applications are managed and funded
- Defining how grant activities are managed and funded
- Determining how funds are delivered to sub-recipient
- Governed by rules and policies of the State of Mississippi

Grantor Programs (cont.)

In addition, Grantor Programs:

- Act as the central master data element in Grantor Management
- Are used to manage data entry and transaction processing
- Ensure data integrity
- Are created and managed by individual agencies for difference business transactions
- Are normally assigned to the area of the agency that is responsible for that program



Grantor Options

There are three Grantor Options:

- **Modified Grantor**
 - Standard Input Forms for Grantor Process shared across all Agencies
 - Attached Documents will be used to collect and save Grantor Program and Award/Agency specific information
- **Full Grantor**
 - Customized development for complete Grantor Lifecycle for each Grantor Program by Agency
- **Opt-Out Grantor**
 - Use FI cost collection processes (rather than the Grantor module) to record and control sub-recipient accounting



Full Grantor Options

Full Grantor Characteristics:

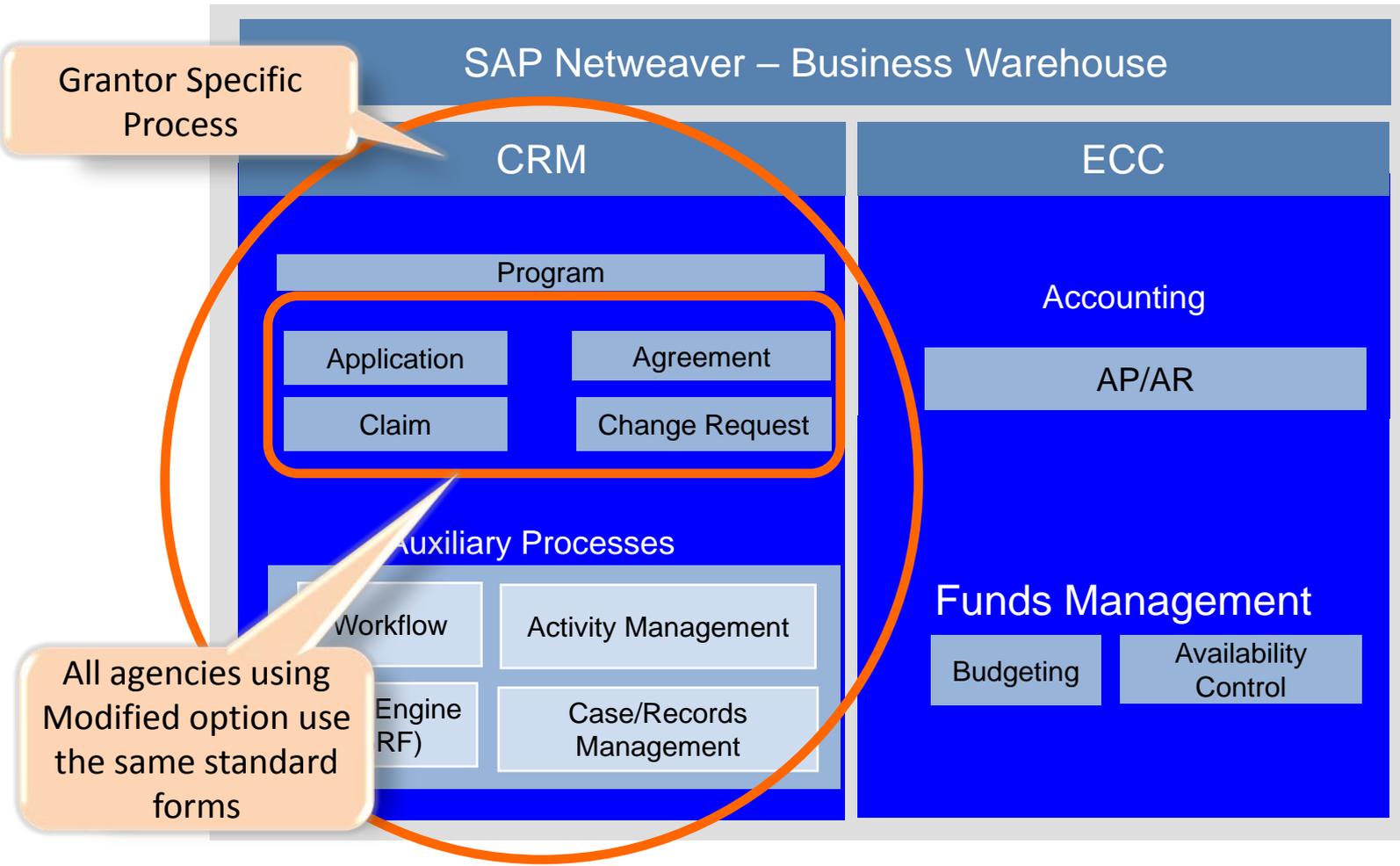
- Customized development for complete Grantor Lifecycle
- Unique On-line forms per Grantor Program and/or Agency
- Custom workflow per Agency
- Custom Performance Tracking

Modified Grantor Programs

Modified Grantor Characteristics:

- Standard Input Forms for Grantor Process shared across all Agencies
- Document attachments will be used to collect and save Grantor Program and Award specific information
- Workflow is a single level approval process

Grantor Full & Modified Options

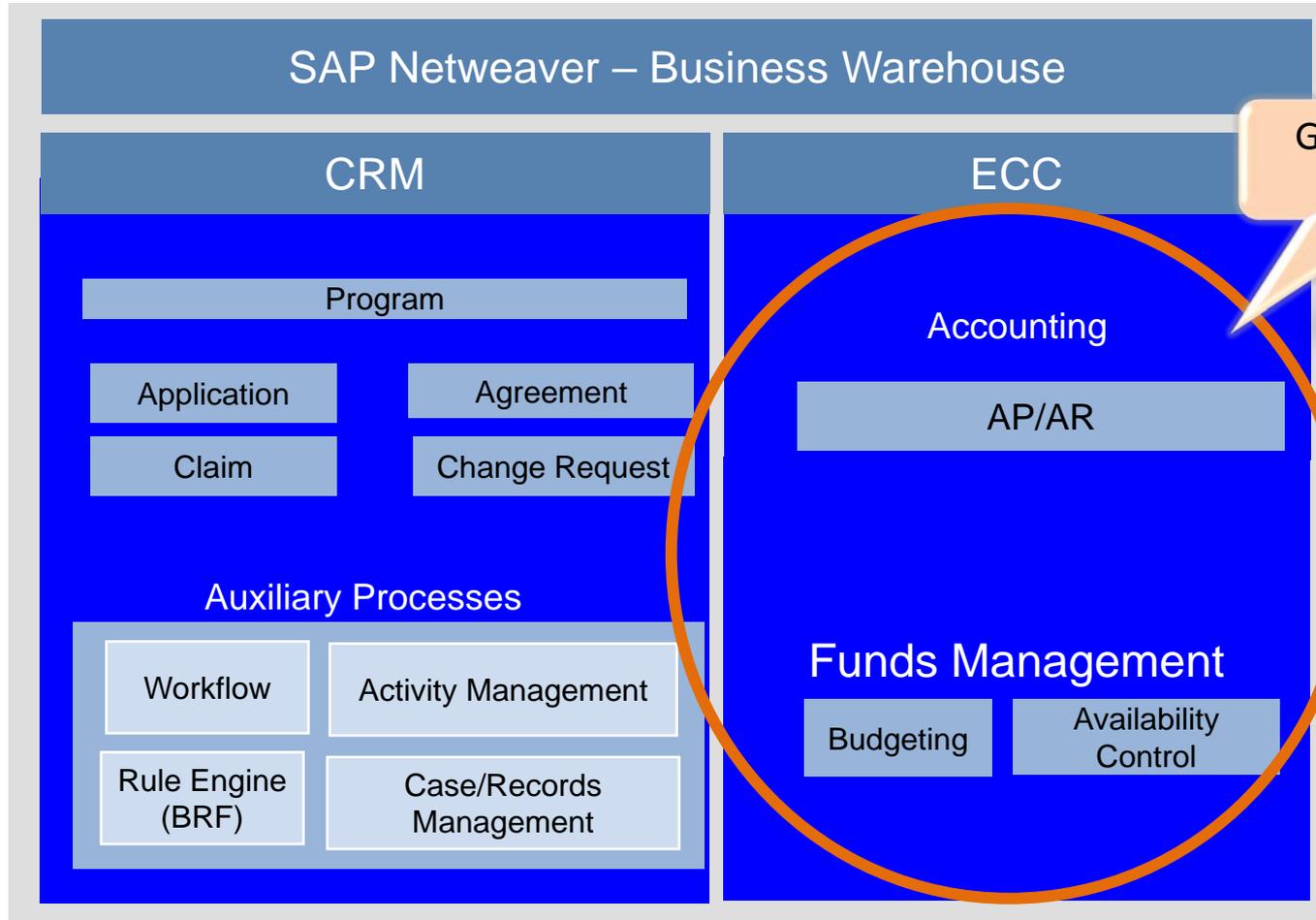


Opt-Out Grantor Programs

Opt-Out Grantor Characteristics:

- Use MAGIC cost collection processes & functionality to record and control sub-recipient accounting
- MAGIC Grantor Module not used
- Funds Management Funds Reservation documents can be created for Sub-Recipient budgetary control
- Performance Tracking is via Legacy Process or can opt to use MAGIC statistical key figures

Grantor Opt-Out Option



Program Prerequisites

The following are the prerequisites for creating a Grantor Program:

- Grant Master Data
- Internal order(s)
- Grant (linked to internal order)
- Sponsored program(s)
- Budget*

* Budget must be released prior to agreements and awards



Grantor Master Data

Business Partner:

- Individuals and organizations that participate in the Grantor process
- Business Partners include:
 - Sub-Recipients
 - Vendors
 - Contacts
 - Employees

Grants and Internal Orders

Grant (Grantee)



Grant (Grantor/OptOut)



Grant (Grantor)





Internal Orders for Grants

When a federal or non-federal sponsor provides an award letter, an Internal Order kicks off the grant set-up process.

- Award letter determines the number of internal orders required
- The Internal Order has the cost center, which identifies the funds center used to collect costs associated with the grant



Sponsored Program

The **Sponsored Program** groups grant-related activities to satisfy reporting needs and uses of the grant at the level required by the Sponsor or the Agency:

- The grant's total is divided over different activities or expenditures
- The grant is used over different areas of the Agency
- There will be one Sponsored Program for every grant-funded Internal Order

Budget

Delivery of Grantee payments must be managed relative to an agency's operating budget to ensure approved budgets are not exceeded.

- This budget controls the 'total' Grantor spending, not the sub-grant/sub-recipient budget
- A budget reservation is triggered from an approved agreement in the form of an earmarked funds document

FUND Smart Numbers

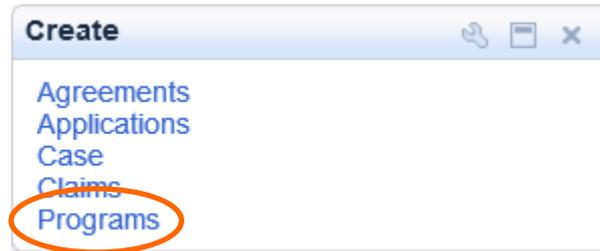
Funds Numbered by Source

- 22XXXXXXXXX General Funds
- 33XXXXXXXXX Special Funds
- 44XXXXXXXXX Education Enhancement Funds
- **53XXXXXXXXX Grant Funds**
- 61XXXXXXXXX Budget Contingency Funds
- 62XXXXXXXXX Health Care Expendable Funds
- 63XXXXXXXXX Bond Funds
- 64XXXXXXXXX Capital Expense Funds
- 65XXXXXXXXX Tobacco Control Funds
- 88XXXXXXXXX Bank Account Funds

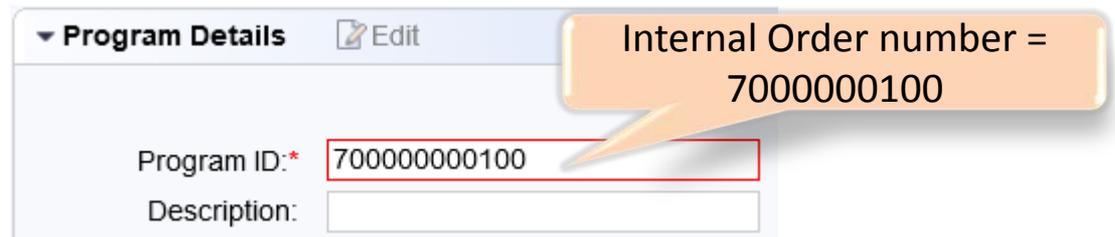
Creating a Grantor Program

Programs are created at the Agency level

- Program Managers create Grantor Programs in CRM using the Create Programs link/function



- The Program ID is set to the number of the funding internal order.

A screenshot of a web application form titled "Program Details". The form has an "Edit" button. The "Program ID:" field is highlighted with a red border and contains the value "700000000100". An orange callout box points to this field with the text "Internal Order number = 7000000100". The "Description:" field is empty.

Creating a Program

This screen shows the Program Details portion of the Grantor program.

The screenshot displays the SAP SOMS Program Manager interface for creating a new grantor program. The main window is titled "Grantor Program: New" and includes a navigation menu on the left with options like Home, Calendar, Worklist, Programs, Agreements, Applications, Claims, Accounts, Activities & Cases, Reports, and Help Center. A "Recent Items" list is also visible, showing "Grantor Application..." and "Grantor Lifecycle: C..." with IDs 700000005000 and 7000000000050.

The "Program Details" section contains the following fields:

- Program ID:
- Description:
- Higher-Level ID:
- Program Type:
- ZSUB_TYPE:
- Employee Resp.: Taff Zickefoose
- Service Organization: O 5000000 Mental Health
- Program Managem...: O 5000000 State of Mississippi S
- Current Status: Created
- New Status:
- Last Changed By/On: /:
- Currency: USD
- Program Profile:
- Start Date:
- End Date:
- Object Type: GMP
- CDFA Number:
- CDFA Description:

The "Process Control" section includes radio buttons for "Appl. Submiss. Peri..." and "Change Req. Submi...", each with options for "Open", "Blocked", and "Date Restriction". Below these are "From:" and "To:" fields for both sections.

Creating a Program (cont.)

This screen shows the Process Control portion of the Grantor program.

The screenshot displays the SAP SOMS Program Manager interface for creating a new Grantor Program. The main window is titled "Grantor Program: New" and includes a navigation menu on the left with options like Home, Calendar, Worklist, Programs, Agreements, Applications, Claims, Accounts, Activities & Cases, Reports, and Help Center. A "Recent Items" list is also visible, showing "Grantor Application..." and "Grantor Lifecycle: C..." with associated IDs.

The "Process Control" section is expanded, showing various configuration options:

- Appl. Submiss. Peri...:** Radio buttons for Open (selected), Blocked, and Date Restriction. Fields for From:: and To::.
- Change Req. Submi...:** Radio buttons for Open (selected), Blocked, and Date Restriction. Fields for From:: and To::.
- Budget Reservation:** Radio buttons for Yes and No (selected).
- Agreement:**
 - Agreement Creation:** Radio buttons for Open (selected), Blocked, and Date Restriction. Fields for From:: and To::.
 - Budget Reservation:** Radio buttons for Yes and No (selected).
- Claim Submiss. Per...:** Radio buttons for Open (selected), Blocked, and Date Restriction. Fields for From:: and To::.
- Transfer to ERP:** Radio buttons for Yes (selected) and No.
- Status ERP Transfer:** Text field with value "Not Transferred".
- Business Agmt Cla...:** Dropdown menu.
- Authorization Group:** Dropdown menu with value "SAP Std. Authorization Group".
- Status Profile:** Dropdown menu with value "SoMS Grantor Program Status".
- Action Profile:** Dropdown menu with value "CRM_GPM".

The "Process Assignments" section is also visible, showing a table with columns for Actions, Object Type, Transaction Type, Web Form, and Questionnaire.

Creating a Program (cont.)

This screen shows the Process Assignments portion of the Grantor program.

The screenshot displays the SAP SOMS Program Manager interface for a 'Grantor Program: New'. The interface includes a navigation menu on the left, a top header with 'SAP SOMS Program Manager' and 'Personalize System News', and a main content area with several sections:

- Process Assignments**: A table with columns for Actions, Object Type, Transaction Type, Web Form, and Questionnaire. The Object Type column is highlighted in yellow. The table contains four rows: Agreement, Application, Change Request, and Claim.
- Expense Types**: A section with an 'Insert' table and columns for Acti..., Expense Catalog, Expense Group, and Expense Type. It shows 'No result found'.
- Attachments**: A section with a 'New' button and 'No result found'.
- Notes**: A section with a 'New' button and 'No result found'.
- Change History**: A section with a 'New' button and 'No result found'.
- Scheduled Actions**: A section with a 'New' button and 'No result found'.
- Status**: A section with a 'New' button and 'No result found'.
- Partner**: A section with an 'Edit List' button and 'No result found'.

The left navigation menu includes: Home, Calendar, Worklist, Programs, Agreements, Applications, Claims, Accounts, Activities & Cases, Reports, and Help Center. A 'Recent Items' pop-up is visible, listing 'Grantor Application...', 'Grantor Lifecycle: C...', and two instances of '700000000500'.

Program Types

Standard Program Profile

- Single funded program type using only one fund

Multi-Funded Program Profile

- This is for programs that will be funded by more than one fund that is linked to the responsible cost center.
- When creating the program, select multi-funded program profile; save the program and the Multi-Funding assignment block will appear when program is released. There you will set up the funds needed and the percentages each fund pays.

Object Assignments

Grantor Objects are assigned to a Grantor Program.

Grantor Object Types:

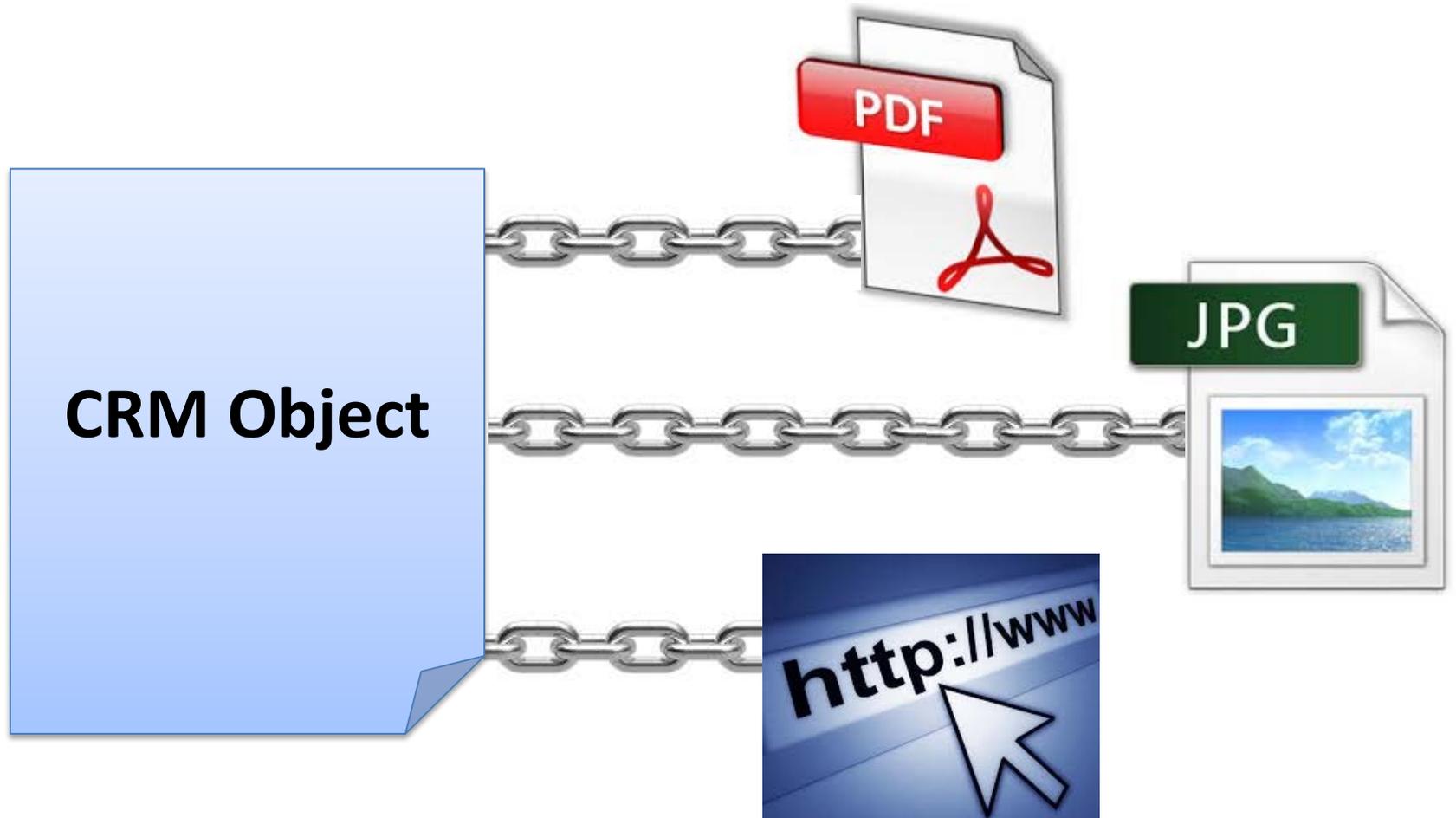
- Application
 - Created/submitted by External User/Sub-Recipient
 - Reviewed, assessed, and processed by Analyst
- Agreement
 - Created from an approved application
 - Reviewed and processed by Analyst

Object Assignments (cont.)

Grantor Object Types: (cont.)

- Claim
 - Created/submitted by User/Sub-Recipient
 - Reviewed and processed by Accountant
- Change Request
 - Created/submitted by External Users
 - Reviewed and processed by Analyst

Attachments



Attachments

External items can be 'attached' to Grantor Objects.

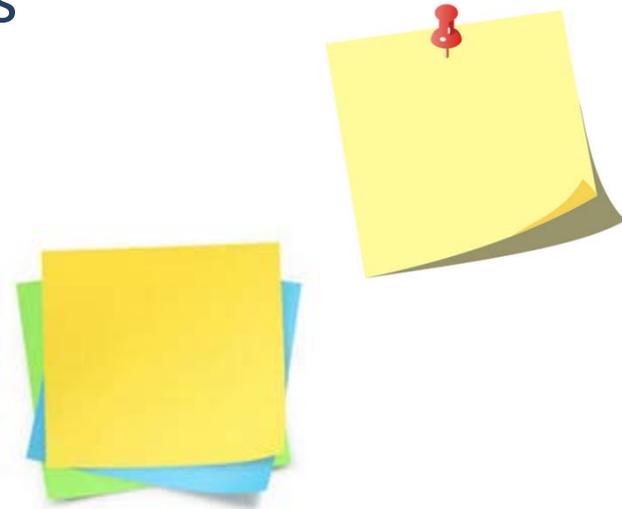
- Similar to ECC Open Text
- There are no size limitations and you can attach standard formats:
 - MS Word and Excel
 - PDF, gif, jpeg, tiff
 - URL
- Only visible to internal users
- Eliminates paper handling inefficiencies



Notes

Note can also be added to Grantor Management Objects.

- Free text entries made directly online
- Only visible to internal users
- Three types:
 1. Description
 2. Note
 3. Objective(s)



Status Management

The status of a program (or combination of all statuses) determines whether the program can be edited and which business transactions can be executed for this program.

- The status of a program is defined under *Status*
- Statuses can be set by the system or by a user

Status Management (cont.)

Grantor Program System Status

- Created
 - This status is set automatically when a program is created
- Released
 - Set manually or can be set by an action
 - Can only release a subordinate program if the higher-level program has already been released

Status Management (cont.)

Grantor Program System Status

- Closed
 - Set manually or can be set by an action
 - Can only be set if all subordinate programs already have the status Closed
 - Cannot make changes to a program with status Closed
 - To make changes, the program needs to be reset to Released
 - Can only be reset to Released if the higher-level program does not have the status Closed, so you reset starting at the higher level

Status Management (cont.)

Grantor Program System Status

- Locked
 - Can be set or reset manually or by an action
 - Can be set independently from the status of the higher-level program or the subordinate programs
 - Once Locked, a program cannot be changed unless the status is reset
 - No follow-up processes are permitted if a program has this status



Workflow

Workflow Routing

- A single level approval in the Agency
 - Grantor Program
 - Applications
 - Change Requests
 - Agreements
 - Claims
 - Billing process (will follow AP workflow Approval)

Let's Practice



Instructor Demo

Complete Exercise(s):

3.1 Create Grantor Program (Administrator)

Knowledge Check



Match the terms with the definition:

Term		Definition
1. Grantor	D	A. Used to divide the grant into individual activities to meet the sponsor's funding and reporting requirements.
2. Sub-recipient	E	B. Entity that provides the funding for the Grantor program.
3. Sponsor	B	C. Categorizes expenses in accordance with the sponsor's requirements for reporting.
4. Sponsored Class	C	D. The Agency from the State of Mississippi making the award to sub-recipients.
5. Sponsored Program	A	E. The receiving Organization, Individual, Local Governmental Entity, or other state agency.

Knowledge Check



True or False? Modified, Full, and Opt-Out are the three Grantor Options.

- A. True
- B. False



Knowledge Check



True or False? Full Grantor Agencies use standard input forms.

- A. True
- B. False

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Unit 4: Grantor Forms



Unit Topics:

- Overview and Usage
- Searching for and Accessing Forms
- Checklists and Surveys



Grantor Form Overview

Forms are used by external users to create and submit Applications, Claims, and Change Requests:

- Application Form
 - Used by applicants
 - Standardized for every agency
 - Attachments used for the specific agency requirements
 - Application reviewed and assessed by Grantor analyst



Grantor Form Overview (cont.)

- Claim Form
 - Online payment request
 - Used by Sub-Recipient to request money
 - Upload additional information as needed
- Change Request Form
 - Used by Sub-recipient to request changes

Searching for Grantor Forms

There are several ways to search and access Grantor forms

- Navigation Bar
- Run time only searches
- Saved Searches
- Search Assignments Blocks

The screenshot shows a search window titled "Search" with a dropdown menu. The dropdown menu includes options like "Home", "Calendar", "Worklist", "Programs", "Agreements", "Applications", "Claims", "Accounts", "Activities & Cases", "Reports", and "Help Center". The search window also displays a list of search results, including "Application Forms" and "Applications".

Saved Searches ▾ CW Train ▾ Go Advanced

Result List: 2 Programs Found

Program ID	Description	Program T...	Service Or...	Status	Start Date	End Date
70000000...	CWGranto...	MS Menta...	Mental He...	Released	07/01/2013	07/31/2014
70000000...	CW Grant...	MS Menta...	Mental He...	Released	07/22/2013	07/25/2014

Checklists and Surveys

Checklists and Surveys are used to assist in the processing and assessment of applications.

- Checklists
 - A list of steps to be performed by agency employees, used to guide and track the application process
- Surveys
 - Used in manual assessments to review requirements vs. submitted information to determine whether an application should be accepted or rejected
 - Can also be used to monitor an agreement by tracking milestones

Knowledge Check



Which Forms are used by Sub Recipients?

- A. Claims and Change Requests
- B. Applications and Claims
- C. Change Requests and Applications
- D. Applications, Claims, and Change Requests

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Unit 5: Grantor Applications



Unit Topics:

- Overview
- Creating from Online Form
- Creating Manually
- Assessments



Grantor Application

Grantor Application Object

- Created when an application is submitted
- Contains all application data for a grant made by a potential sub-recipient
 - Name, Organization, and contact information
 - Requested amount, authorized amount, start and end dates
- Usually created (submitted) by the applicant (External User) via the online Application Form
 - Additional methods include: Telephone, fax, letter



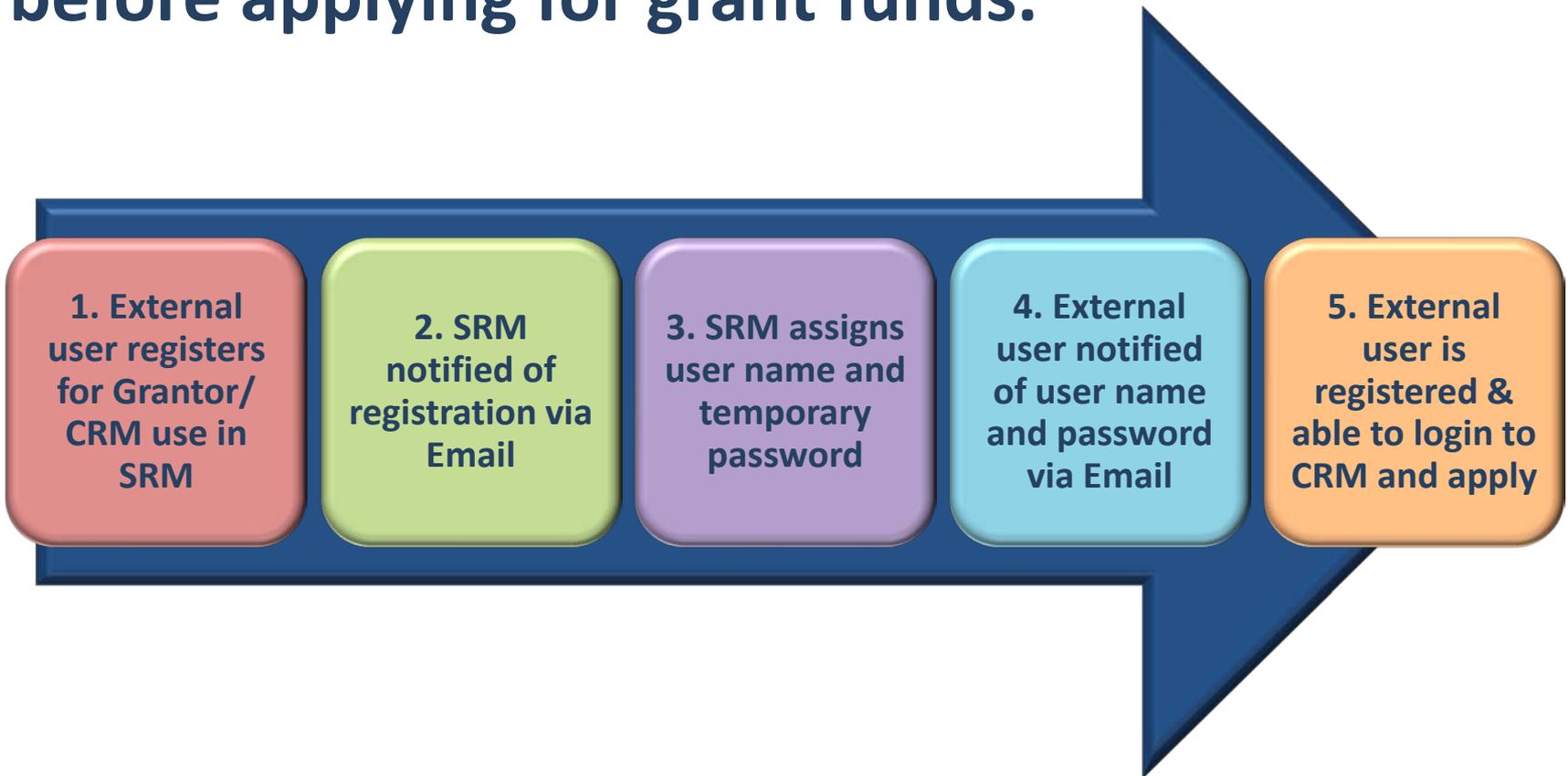
Grantor Application (cont.)

Grantor Application Object

- A Case Record is automatically created when the Application is saved. A link is listed in the Case Management assignment block.
- External documents can be attached to the Application in the Attachments section.

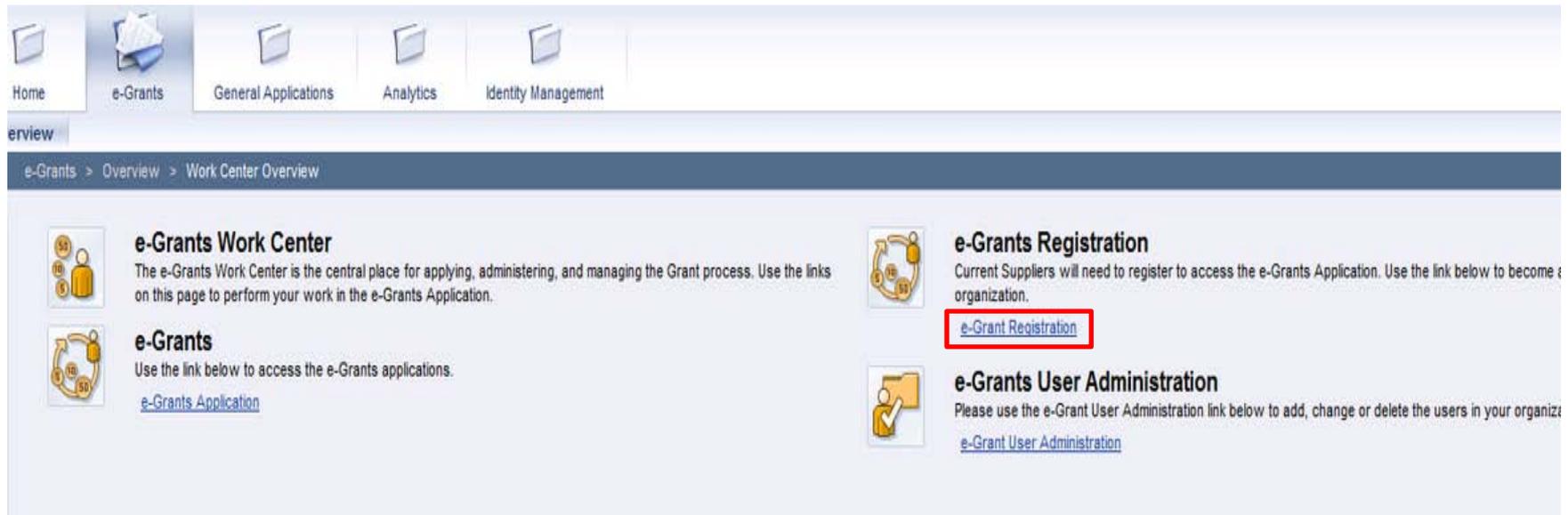
Sub-Recipient Registration

Potential Sub-Recipients must first register before applying for grant funds.



Registration (Cont.)

- After registration, the external (admin)user (if registered as an organization) will need to go to the e-Grants section and click on e-Grant User Administration link shown below.



Home e-Grants General Applications Analytics Identity Management

erview

e-Grants > Overview > Work Center Overview

e-Grants Work Center
The e-Grants Work Center is the central place for applying, administering, and managing the Grant process. Use the links on this page to perform your work in the e-Grants Application.

e-Grants
Use the link below to access the e-Grants applications.
[e-Grants Application](#)

e-Grants Registration
Current Suppliers will need to register to access the e-Grants Application. Use the link below to become a member of your organization.
[e-Grant Registration](#)

e-Grants User Administration
Please use the e-Grant User Administration link below to add, change or delete the users in your organization.
[e-Grant User Administration](#)

Registration Cont...

- This is the contact person creation screen. The only section needed to fill out is the “contact person data” section.

Administrator - Create User & Contact Person

Company Data

Business Partner* 2030556948

Company Name*

Street* 2768 Hwy 471

House Number*

Postal Code* 39047

City* Brandon

Country* USA

Region* Mississippi

Telephone/Extension

Fax/Extension

E-Mail Address

Contact Person Data

Form of Address* Ms.

First Name*

Last Name*

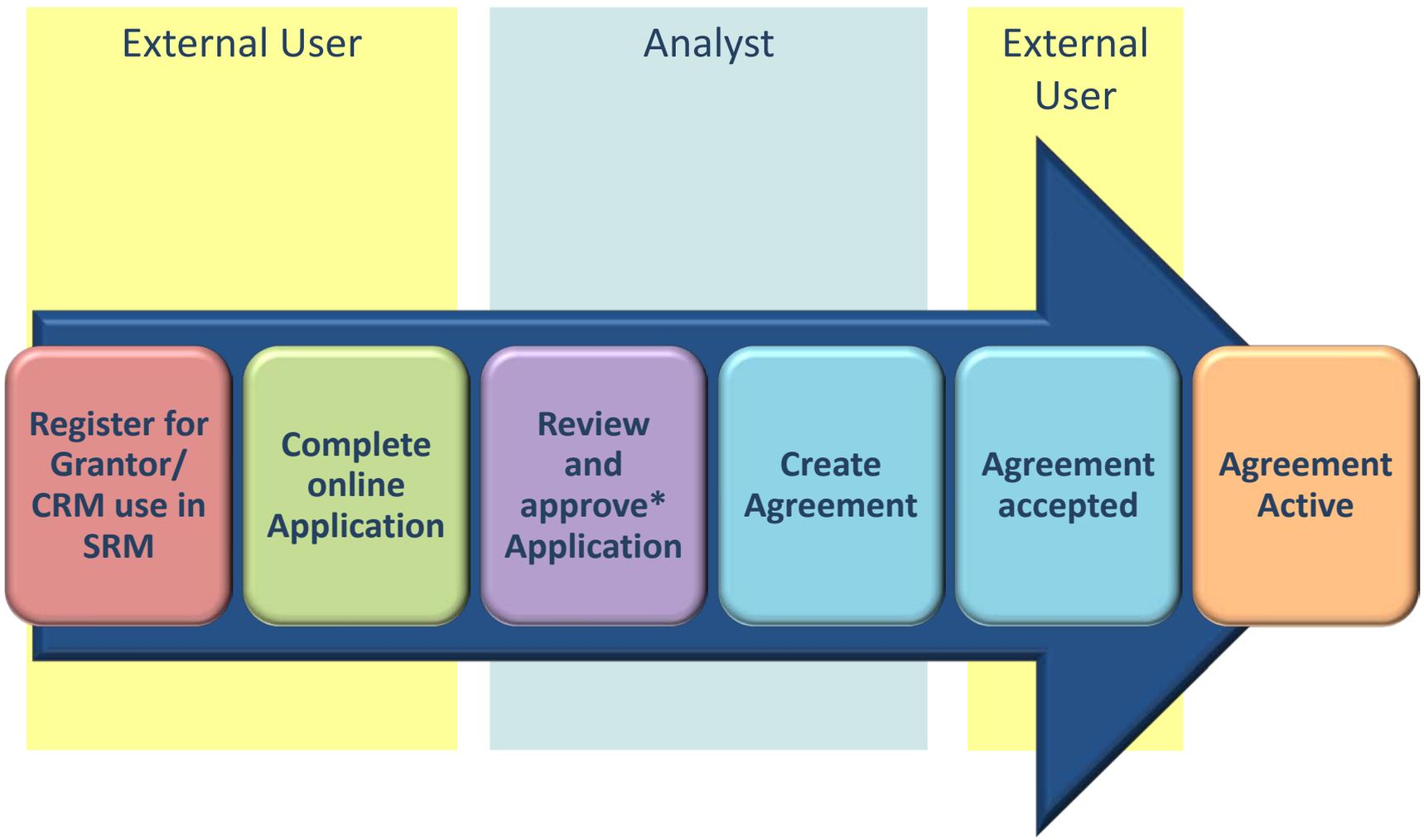
Telephone/Extension

Fax/Extension

E-Mail Address*

Language* English

Grantor Life Cycle: Application





Completing an Online Application

Online application:

- Search and select specific Application Form for specific Program
- Verify prepopulated fields are correct
- Fill out remaining fields

Manual application:

- Create a blank form by selecting ***Applications*** in the Create Assignment Block
- All fields are blank
- Each field must filled out by the applicant

Online Application

Below is an example of the online application.

The screenshot displays the 'New Application Form' interface for the SAP SOMS External User. The page features a navigation menu on the left with options: Home, Worklist, Agreements, Applications, Claims, Help Center, and Recent Items (No Entry). The main content area is titled 'New Application Form' and includes a 'ms.gov' logo and the heading 'Online Grantor Application Form'. The form contains several sections:

- Application Type:** Radio buttons for 'Application' (selected) and 'Pre-Application'.
- Applicant Type:** Radio buttons for 'Individual' and 'Organization'.
- SUBMISSION TYPE (Select One):** Radio buttons for 'New' (selected), 'Continuation', and 'Revision'. Below this is an 'Application No:' field.
- Form Fields:** A grid of input fields for 'Date' (02/04/2014), 'Agency Name' (Education), 'Program ID' (700000000100), and 'Program Description' (Grantor Training).
- APPLICANT INFORMATION:** A section with a 'Legal Name of Individual:' field.

The interface also includes a top navigation bar with 'Options', 'Personalize', and 'System News', and a search bar with 'Saved Searches', 'Go', and 'Advanced' buttons.

“Manual” Application

Below is an example of the “manual” application.

The screenshot displays the SAP SOMS External User interface for creating a new application. The page is titled 'Application: New' and includes a navigation menu on the left with options like Home, Worklist, Agreements, Applications, Claims, and Help Center. The main content area is divided into several sections:

- General Data:** Includes fields for Description, Grantee ID/Name, Grantee Contact, Program ID* (highlighted in red), Last Changed By..., Service Organizat... (highlighted in red), Employee Respo..., Start Date* (highlighted in red), End Date* (highlighted in red), External Reference, Status, and Sales Organization.
- Payments:** Includes fields for Requested Amount, Eligible Amount, and Authorized Amount, all set to 0.00.
- Advances:** Includes fields for Requested Amount, Eligible Amount, and Authorized Amount, all set to 0.00.
- Totals:** Includes fields for Requested Amount, Eligible Amount, and Authorized Amount, all set to 0.00.
- Legislative District Number:** Includes fields for US Congressiona..., MS Senate Distric..., and MS House Distric..., all set to 0.

The interface also features a top navigation bar with 'Options', 'Personalize', and 'System News', and a search bar with 'Saved Searches', 'Go', and 'Advanced' buttons.



Application Assessment

Automatic Assessment

- An evaluation, ranking, and/or scoring of a submitted sub-recipient application based on eligibility requirements
- Integrated with workflow to provide necessary checks and approvals
- Automatic assessments are performed by using defined Grantor program rules to evaluate data entered via the online application form
- A positive assessment requires the application status be set to approved
- A negative assessment requires the application status be set to rejected

Application Assessment (cont.)

Manual Assessment

- Manual assessments: the agency utilizes an external checklist to guide the evaluation (automated checklists are not included in CRM)
- Checklists are agency-specific, based on the specific requirements of the Grantor program and are external to CRM.
- An analyst performs the assessment for a “modified” Grantor, comparing the application against eligibility criteria



Application Status Changes

Multiple possible statuses for application object but not statuses all are mandatory:

- Can go straight from “In Review” to “Application Approved”
- Extra levels of review handled in statuses and Partner function

Let's Practice



Instructor Demo

Complete Exercise(s):

5.1 Create/Submit Application Form (External User)



Knowledge Check



True or False? An Application Object is created when an online application is saved.

- A. True
- B. False

Knowledge Check



Potential Sub-recipients must perform which of the following before applying online?

- A. Nothing. Applications are open to the public
- B. Be approved by the State of Mississippi as valid applicant meeting all requirements
- C. Register online to receive login credentials (username and password)
- D. B and C

Knowledge Check



An Assessment:

- A. Is an evaluation of a submitted application based on eligibility requirements
- B. Can be processed by the Program Manager
- C. Can be processed by the Grantor Accountant
- D. A and B

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Unit 6: Grantor Agreements



Unit Topics:

- Overview
- Creating an Agreement
- Financial Details

Grantor Lifecycle: Agreement





Grantor Agreement

A Grantor Agreement captures the terms and conditions of an awarded grant

- Created from an approved Grantor application
- Represents the contractual agreement entered into by the grant organization (Grantor) and the grant applicant (sub-recipient)
- Uploaded as a form or electronic document and stored with the Grantor object associated with the Application of the specific Grantor Program

Grantor Agreement (cont.)

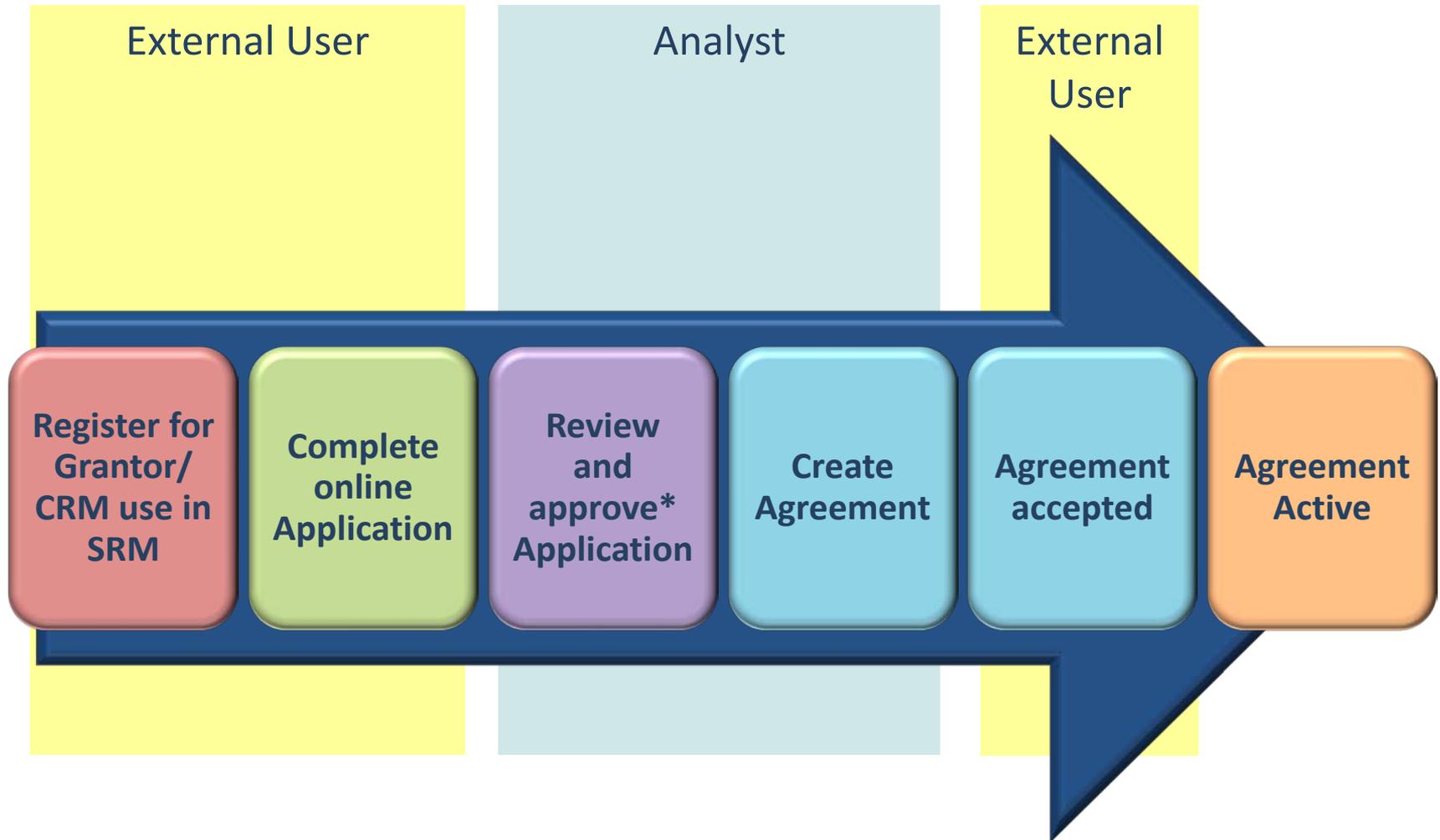
The Agreement includes:

- Funds Reservation
- Business rules framework



**The Grantor Agreement is integrated with
MAGIC Finance and Controlling modules.**

Application and Agreement Process





Financial Details

Financial Details of an Agreement can be recorded two ways:

- Recorded and managed as individual line items in the Agreement Item List
- If additional expense types are needed you need to take them from the initial line item
- Signed contract uploaded via Attachment functionality

Agreement Payment Types

Reimbursement

- All agreements default as the **reimbursement** payment type
- Reimbursement is when the sub-recipient expends money related to the sub-grant and files a claim for reimbursement of costs associated with that program



Agreement Payment Types (cont.)

Advance Payment

- When the sub-recipient wants sub-grant money to be paid **in advance** instead of being reimbursed.
- When creating an agreement, create a new line item and select “Advance” when prompted. Then go through the same expense type procedure you normally would.
- Now the Agreement is set up to handle Advance claim reports. Note: An agreement can support both reimbursement and advance payment types at the same time.

Agreement Liquidation Period

The system allows a three month period after an agreement ends in which claims can be submitted and an agency can pay the claims (“Liquidation Period”).





Agreement Liquidation Period (cont.)

Two methods to achieve this:

- If you know ahead of time that you want to use the Liquidation Period: Set up the program with the program end date extended three months past the actual program end. In Process Control, set the end date for the time in which agreements can be created to equal the **actual** program end date.
- You can manually extend the program end date at any time to allow payment of late claims. If you extend the program end date after the fact, you must manually change the end date in the header and line item(s) of any associated agreements to match the updated end date.

Let's Practice



Instructor Demo

Complete Exercise(s): 6.1 Process Application and Create Agreement (Analyst)

Knowledge Check



The Grantor Agreement:

- A. Captures the terms and conditions of an awarded grant
- B. Represents the contractual agreement between the Grantor and Sub-recipient
- C. Is created by the Analyst and Accountant upon recording the Grantor Application
- D. Is created from an approved Grantor Application
- E. A, B, and D

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Unit 7: Grantor Claims



Unit Topics:

- Overview
- Claim Forms
- Claim Processing
- Financial Details

Grantor Lifecycle: Claim





Grantor Claims

A Grantor Claim represents a request from the sub-recipient for payment or reconciliation of payment based on accounting for incurred expenses or meeting other terms or conditions of the Grantor Agreement.

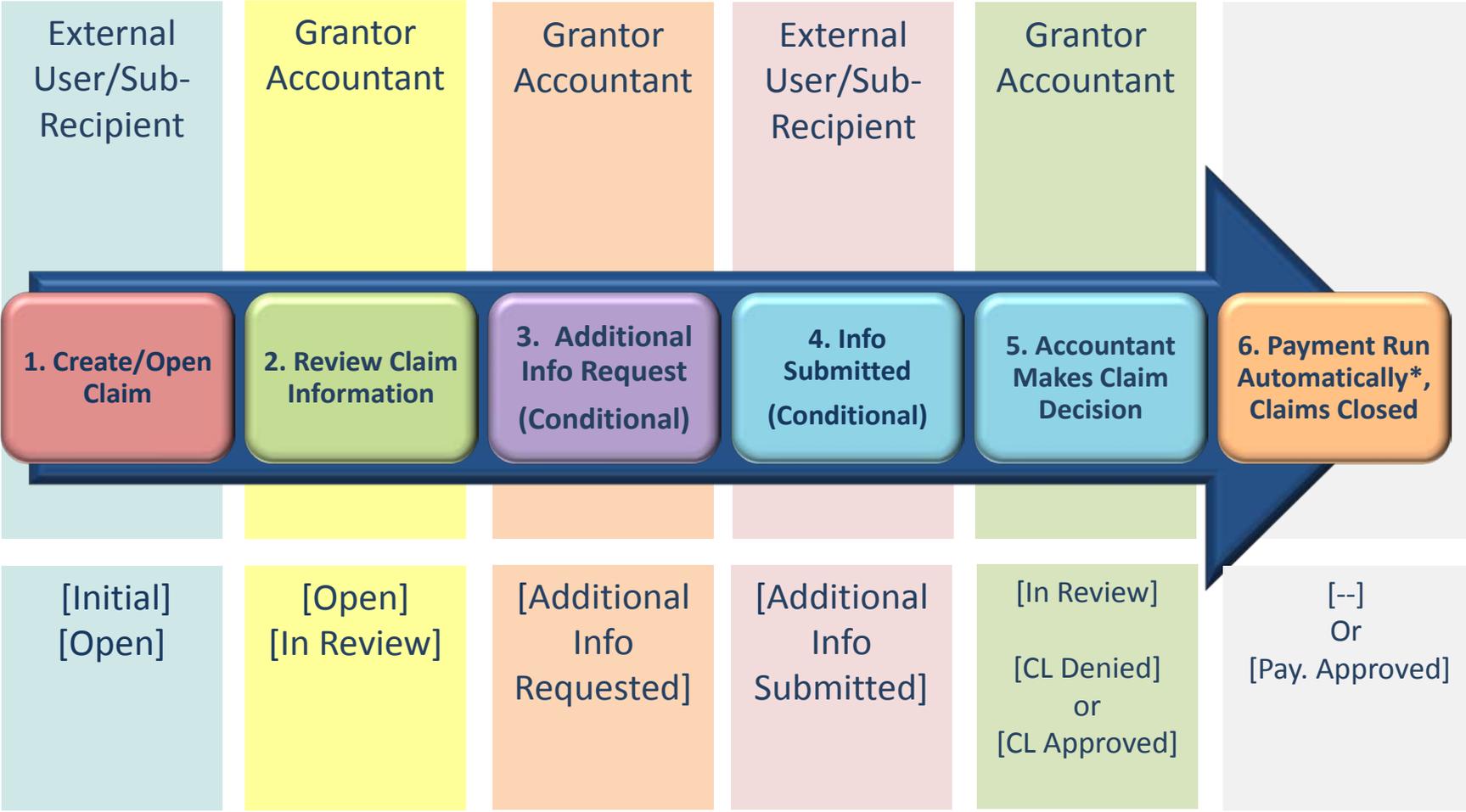
- Claim items are checked manually or automatically for eligibility
- The Claim is assigned to the relevant Agreement
- Individual Claim items are assigned to Agreement line items

Grantor Claims (cont.)

Claims can be submitted via multiple channels (examples: web form, phone, fax, mail, email)

- Claims trigger a Billing Document used by Finance
- Availability Check is executed against the agreement and any advances cleared
- Notes and Attachments may be added
- MAGIC financial data is updated and current

Grantor Lifecycle – Claims



Financial Document Flow

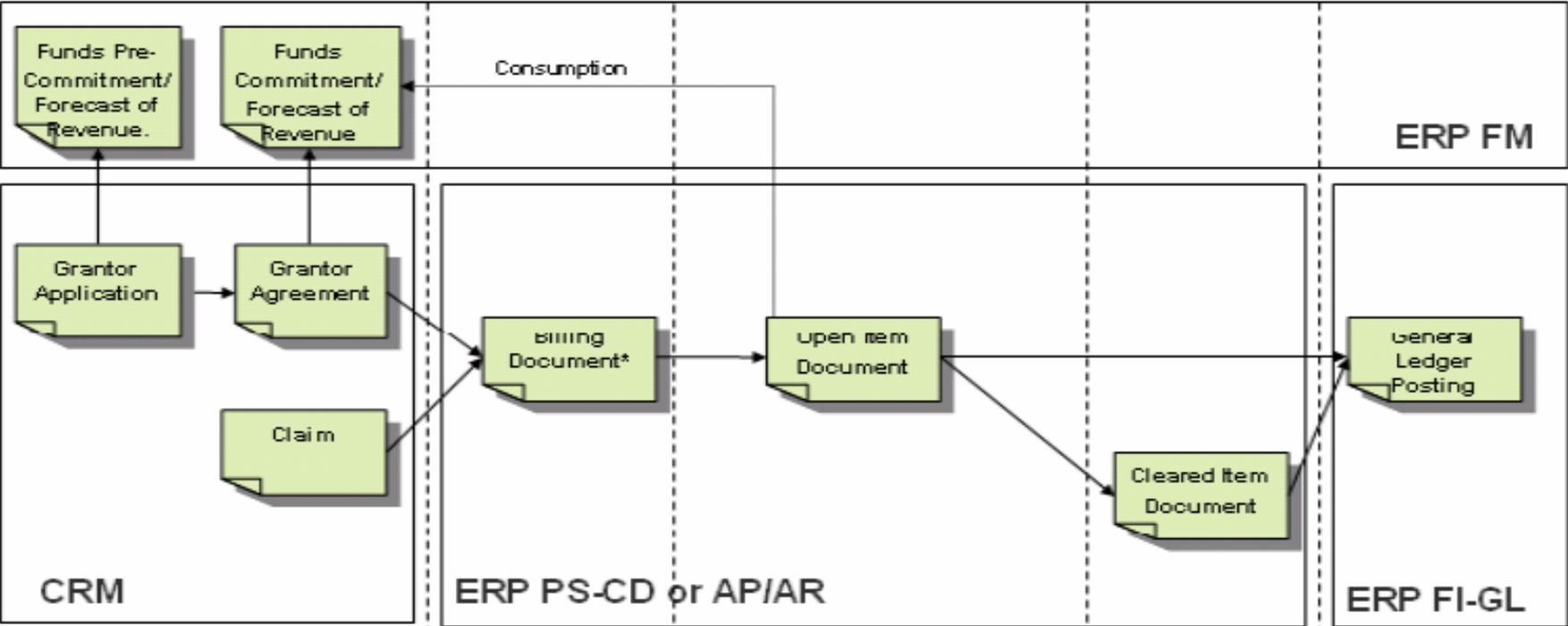
Budget encumbrance

Billing

Invoicing/Open item management

Payment Run

Transfer to FI



FM = Funds Management
 PS-CD = Public Sector Collection and Disbursement
 AP/AR = Accounts payable/Accounts receivable

Claim Expense Categories

Expense Categories are assigned to the Grantor Program.

Common expenses include:

- Salaries and Wages
- Travel and Subsistence
- Contractual
- Commodities
- Capital Outlay
- Subsidies

Let's Practice



Instructor Demo

Complete Exercise(s):

7.1 Create/Submit Grantor Claim Form (External User)

Complete Exercise(s):

7.2 Process Grantor Claim Form (Accountant)



Knowledge Check



True or False? Claims must be submitted via an online form.

- A. True
- B. False

Knowledge Check



True or False? Grantor Analysts analyze the validity of a Claim and determine its eligibility for payment.

- A. True
- B. False

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Unit 8: Grantor Change Requests



Unit Topics:

- Overview
- Change Request Forms
- Processing Changes

Grantor Lifecycle: Change Request





Grantor Change Request

A Grantor Change Request represents any change, initiated by the Sub-recipient or grant organization, that has an impact on an existing Agreement.

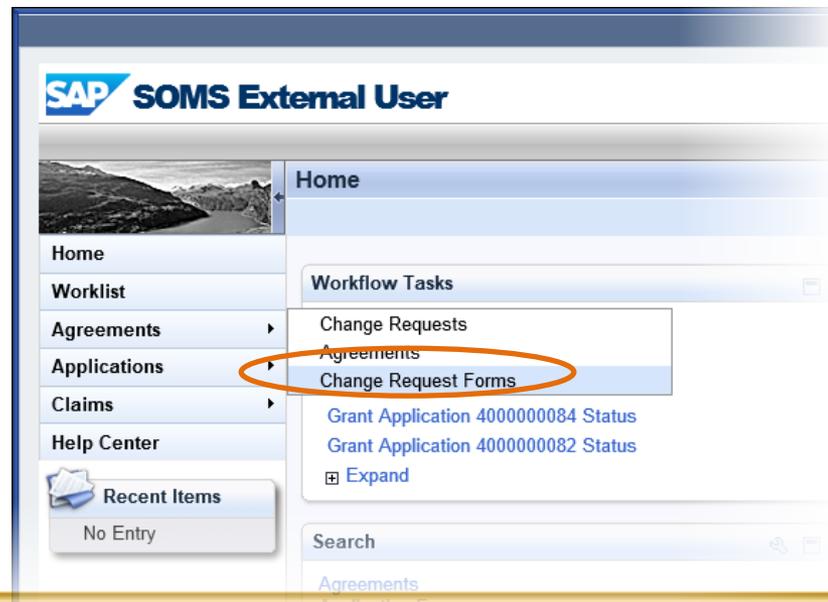
- Manages changes to a Grantor agreement after the agreement has been approved and released
- Evaluates important changes to the agreement
- Generates new versions of the agreement as PDF documents for internal tracking and external processing

Change Request Form

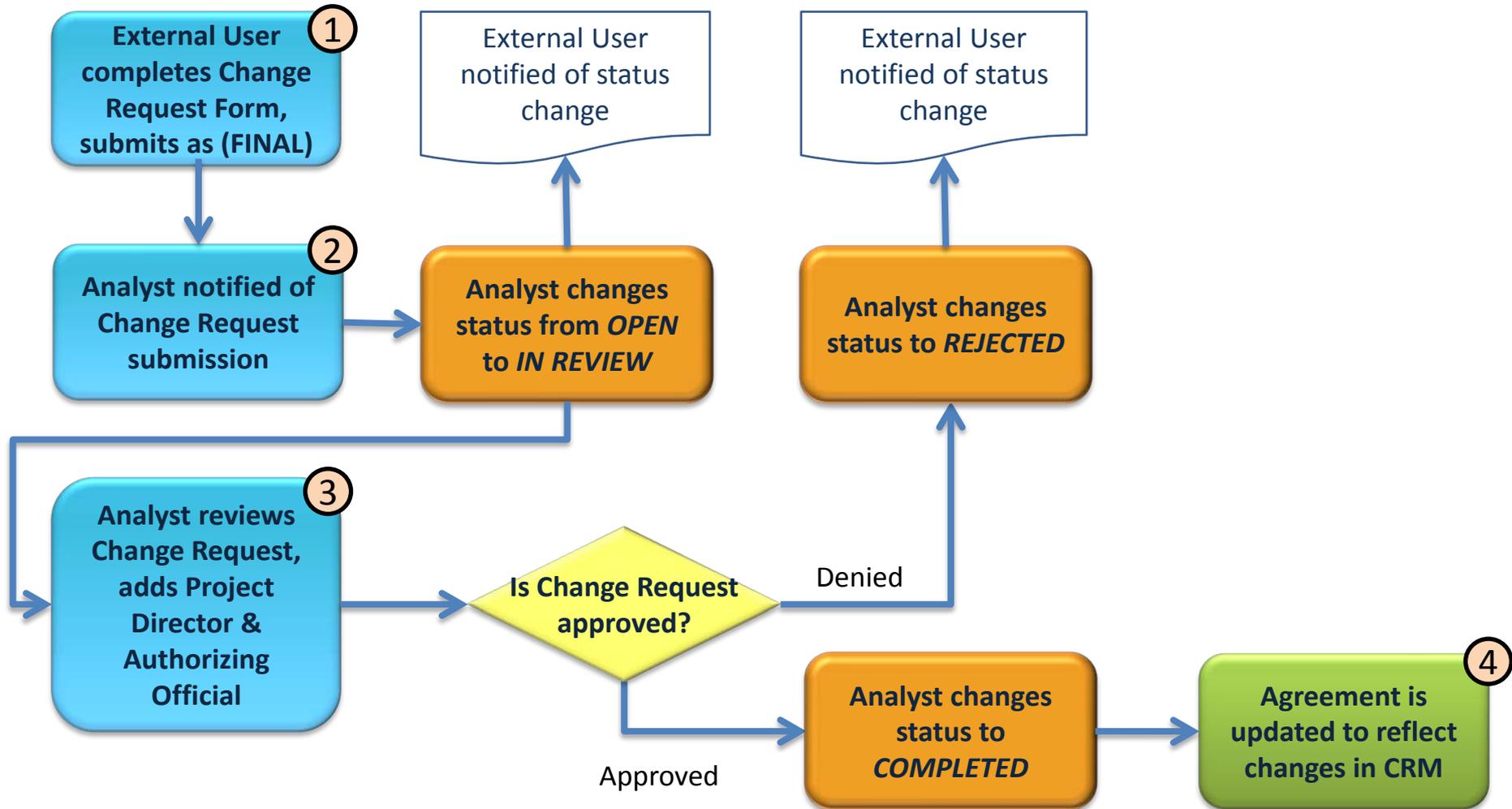
An External User accesses a Change Request Form via the CRM Work Center.

- Follow this menu path:

Navigation Bar → Agreements → Change Request Forms



Grantor Change Request Process



Grantor Change Request

Notes

- Life of a Change Request comes after an Application is submitted
- A Change Request cannot be used to make an agreement retroactive

Let's Practice



Instructor Demo

Complete Exercise(s):

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

Complete Exercise(s):

8.2 Process Grantor Change Request Forms (Analyst)

Knowledge Check



A Grantor Change Request:

- A. Is a requested change to an application
- B. Is reviewed and processed by the Grantor Analyst
- C. Can be used by a sub-recipient to request additional funds
- D. B and C

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Unit 9: Grantor Case Management and Reporting



Unit Topics:

- Overview
- Features and Usage
- Reporting

Grantor Lifecycle: Change Management and Reporting





Grantor Case Management

Grantor Case Management provides a central hub for all documents related to a single Application and its follow-on transactions.

Objects linked to Grantor Case include:

- Grantor Program
- Grantor Application
- Grantor Agreement
- CRM Activities
- CRM Tasks
- Business Partner Information
- Earmarked Fund Documents
- AR/AP Acctg Documents
- Grantor Claim
- Grantor Change Request

Grantor Case Management

Monitoring

- Grantor monitoring is managed with CRM Activities
- Activities can track and monitor progress of a case, as well as provide information for all interactions with the sub-recipient during the Grantor life cycle
- Examples of Activities: telephone calls, customer calls, general tasks, reminders of appointments, etc.



Reporting

- Web-based Business Analytics system (BI Reporting) provides data through the previous day's business and is accessed through the MAGIC portal
- To learn more about how to navigate the Business Analytics system, there is an eLearning course available in uPerform: [BAN800 Business Analytics – Basic User eLearning](#)



Let's Practice



Instructor Demo

Complete Exercise(s):

9.1 Display BI Report

Knowledge Check



True or False? Grantor Case Management provides a central hub for all documents related to a single Application.

- A. True
- B. False

Course Summary

Now that you have completed Day 2, you should be able to:

- Access and navigate MAGIC
- Describe the Grantor programs
- Describe the opt-out procedure
- Identify Grantor forms
- Describe the Grantor agreements
- Identify Grantor claims and change requests
- Describe Grantor case management
- Run Grantor reports

Transactions/Tasks Discussed: CRM

Create Grantor Program (Administrator)

Create/Submit Application Form (External User)

Process Application and Create Agreement (Analyst)

Create/Submit Grantor Claim Form (External User)

Process Grantor Claim Form (Accountant)

Create/Submit Grantor Change Request Form (External User)

Process Grantor Change Request Forms (Analyst)

Display BI Report



Transactions/Tasks Discussed: ECC

KO01

- Create Internal Order

KO02

- Change Internal Order

FMMEASURE

- Funded Program: Maintain

GM_BDGT_RELEASE

- GM Budgeting Release Process / Create Grant Budget to Funds Management

GMGRANT

- Grant Master – Single Screen (Change Grant Status)

GMPROGRAM

- GM Sponsored Program Master Data / Create Sponsored Program

Support Information

Please go to the MMRS website for the latest Customer Support information.



Class Evaluation

Please complete the Class Evaluation before leaving. Thank you!

<https://www.surveymonkey.com/s/MAGICTraining>