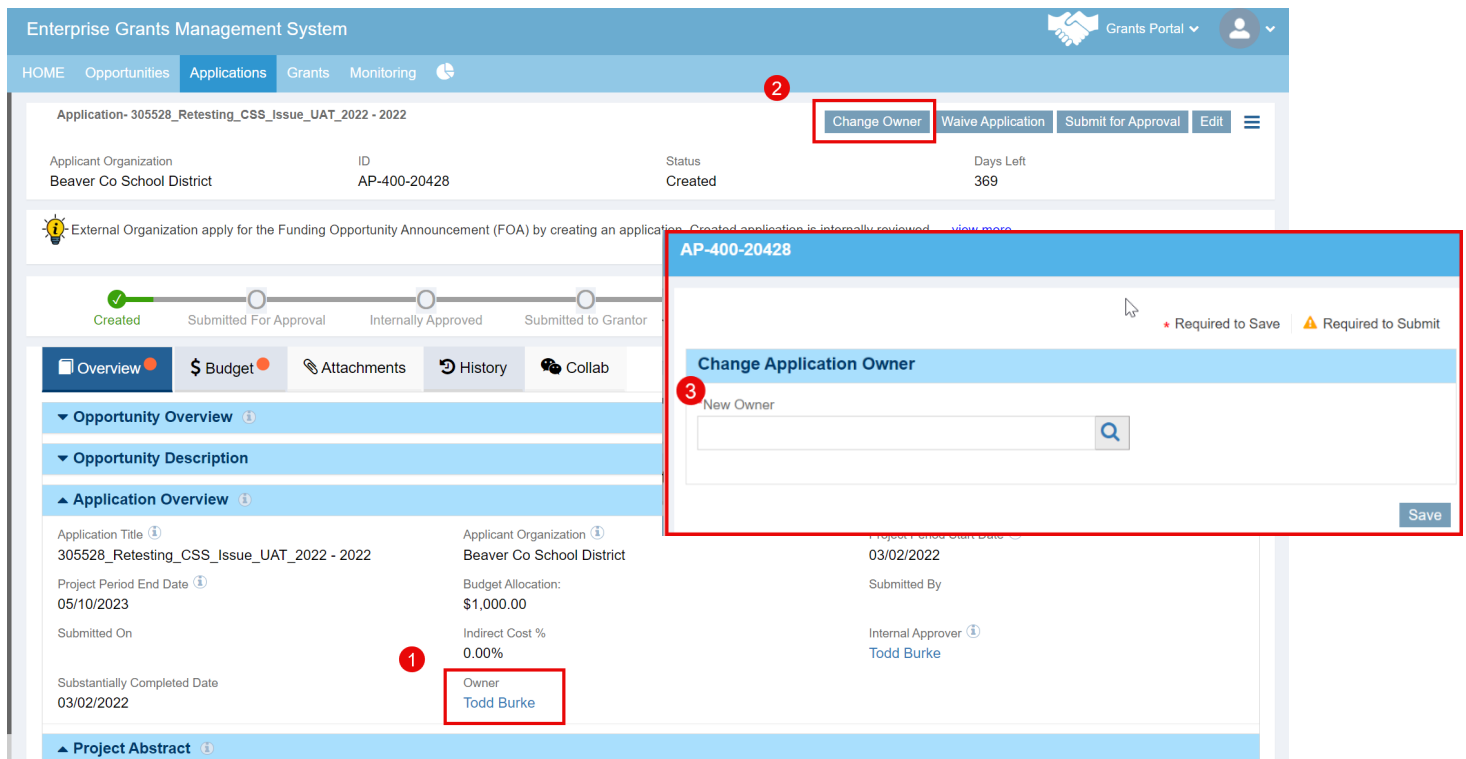


Change Application Owner

Each application in Utah Grants has an assigned owner. This is the individual responsible for completing the application. Typically, this is the first individual to accept the application pending task. If the assignment needs to be changed, the subrecipient can assign a new application owner. This function is limited to the current owner, the Key Point of Contact, and the Subrecipient Administrator.



The screenshot displays the 'Enterprise Grants Management System' interface. At the top, there is a navigation bar with 'HOME', 'Opportunities', 'Applications', 'Grants', and 'Monitoring'. The 'Applications' tab is active, showing a list of applications. One application, 'Application- 305528_Retesting_CSS_Issue_UAT_2022 - 2022', is selected. A 'Change Owner' button is highlighted with a red box and a red circle labeled '2'. Below the application list, there is a progress bar with stages: 'Created', 'Submitted For Approval', 'Internally Approved', and 'Submitted to Grantor'. The 'Created' stage is active. Below the progress bar, there are tabs for 'Overview', 'Budget', 'Attachments', 'History', and 'Collab'. The 'Overview' tab is selected, showing an 'Application Overview' section. In this section, the 'Owner' field is highlighted with a red box and a red circle labeled '1', showing 'Todd Burke'. A pop-up window titled 'Change Application Owner' is shown, with a search field for 'New Owner' and a 'Save' button. The pop-up window is highlighted with a red box and a red circle labeled '3'. The pop-up window also contains a 'Required to Save' and 'Required to Submit' warning.

1. The application owner is shown on the Application Overview Tab.
Note: If the owner shown is "Subqueue," the application is available for ownership by all active users from Application > Pending Tasks.
2. The current application owner, the Key Point of Contact or the Subrecipient Administrator will see a "Change Owner" button.
Note: the change owner button is only available before the application submission or while being revised by the subrecipient.
3. A pop-up window will appear. User is able to select the new owner and save.

Note: The application pending task will be transferred to the new owner and will remain open until the application is submitted.

Collab Feature

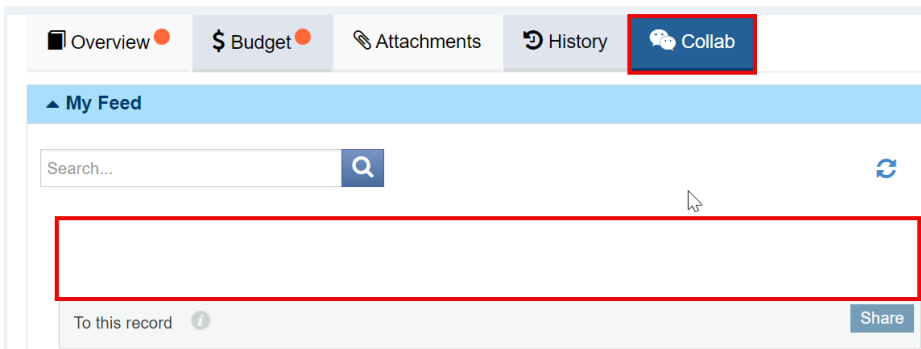
Subrecipients can collaborate on work within Utah Grants utilizing the Collab feature. Users can tag and message other Utah Grants users within their organization and Utah State Board of Education. Available records have a tab labeled “Collab,” including applications, payment requests and site visits.

Collab My Feed

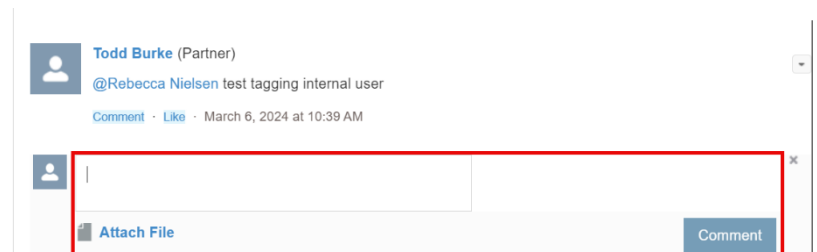
My Feed can be used for collaboration and messaging within Utah Grants. When a user is tagged on a record, an email will be sent notifying the user that they have been tagged.

Available records show a tab labeled Collab. Under My Feed, type @[name] to tag a user.

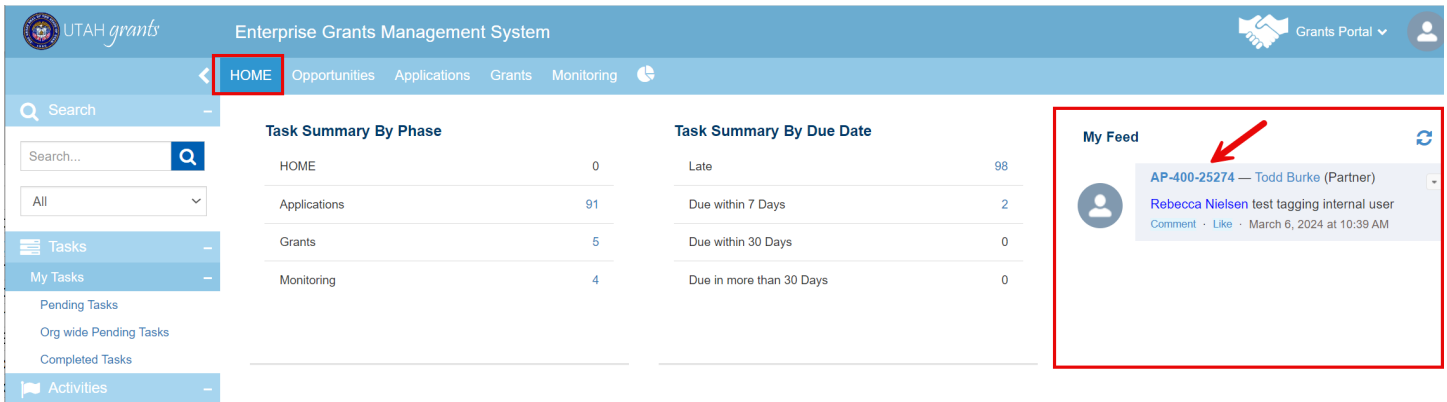
- Type “@” (ampersand) and begin typing the name. Then select the user to tag them in the message.
- Multiple users may be tagged within one message.
- Subrecipient can tag other users within their organization or USBE users.
- Tagged users will receive an email with a link to the record in Utah Grants.



After initiating a conversation, users can comment or add attachments.



- Users will also see the message on the Home Screen of Utah Grants under My Feed.

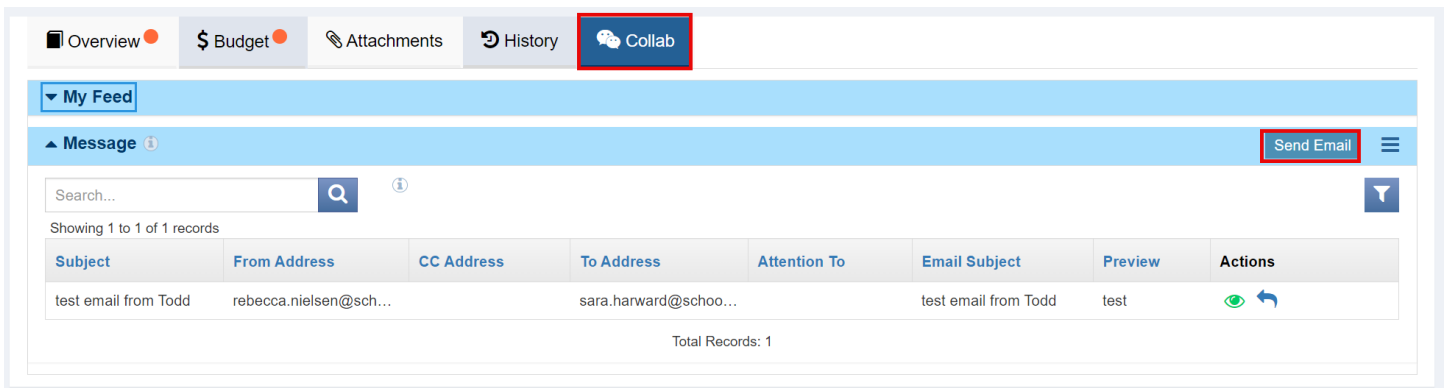


- User can link directly to the record by clicking the record ID hyperlink.
- User can comment from the home screen or from the record.
- Only the message creator and those tagged will view the message from the home screen. However, messages can be viewed on the specific record by all users.
- Messages can be deleted by the message creator or tagged participants.

Collab Messages

Email messages can be generated directly from the record.



Available records show a tab labeled Collab. Go to the Message section (below My Feed) to view and generate email associated with the record.



- You must know the recipient's email address to send an email from the record.
- The email does not contain a link to the record yet, but functionality is forthcoming.

- Email message sender and recipients will see the email message on the Home Screen of Utah Grants under My Workspace: Messages.

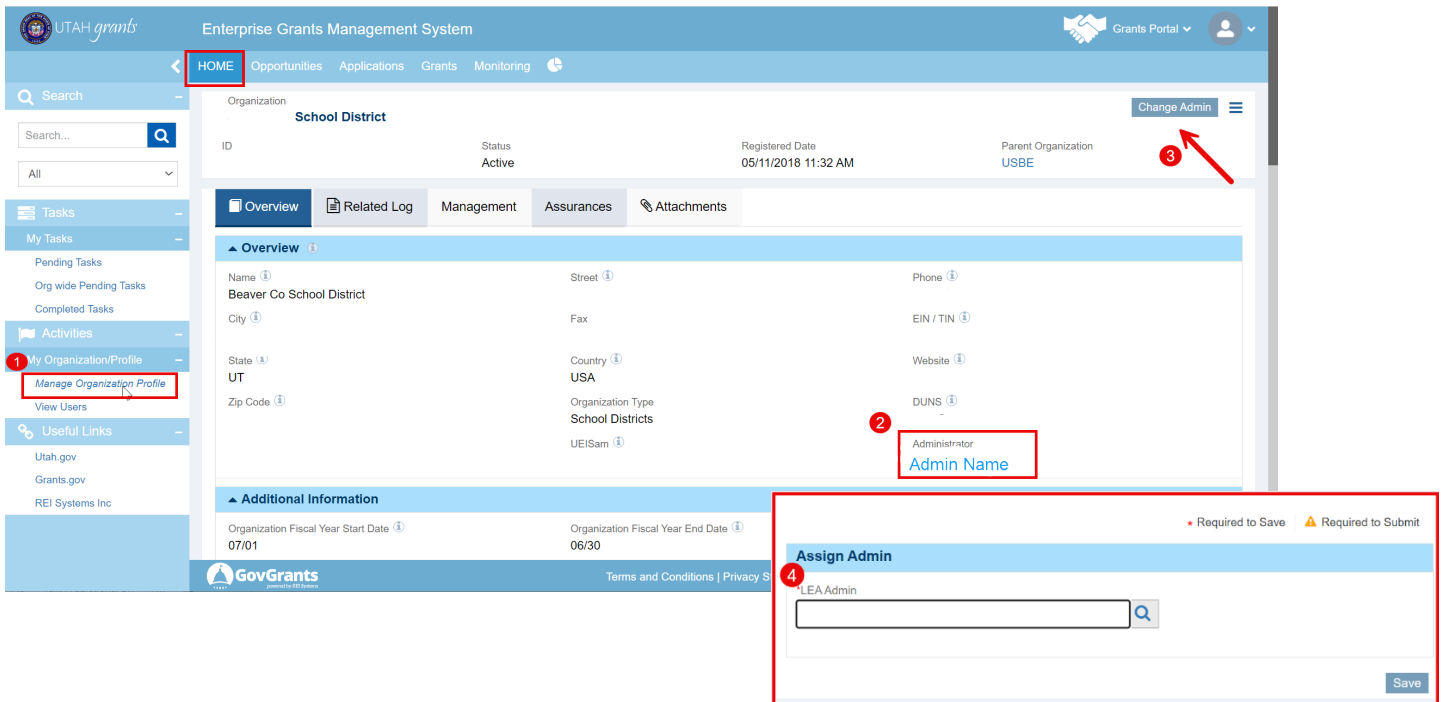
The screenshot shows the 'Enterprise Grants Management System' interface. The top navigation bar includes 'HOME', 'Opportunities', 'Applications', 'Grants', and 'Monitoring'. The 'HOME' tab is selected. Below the navigation bar, there are several sections: 'Task Summary By Phase' (HOME: 0, Applications: 91, Grants: 5, Monitoring: 4), 'Task Summary By Due Date' (Late: 98, Due within 7 Days: 2, Due within 30 Days: 0, Due in more than 30 Days: 0), and 'My Feed' (AP-400-25274 — Todd Burke (Partner), Rebecca Nielsen test tagging internal user). The 'My Workspace' section is highlighted with a red box and contains tabs for 'Messages', 'Files', 'Calendar', and 'Notes'. Under the 'Messages' tab, there is an 'Inbox' section with a search bar and a table of email records. A red arrow points to a box and arrow icon in the 'Actions' column of the table.

From Address	CC Address	To Address	Attention To	Email Subject	Created Date	Description	Actions
rebecca.nielsen@sc...		sara.harward@sch...		test email from Todd	03/06/2024 11:21 AM	test	 

- User can link directly to the record by clicking the box and arrow icon in the Actions column.
- User can view the email detail by clicking on the eye icon in the Actions column.
- Only email recipients and creator can view the message from the home screen. However, email messages can be viewed on the specific record by all users.
- Email messages can only be deleted by the email creator.

Subrecipient Administrator Role

The Subrecipient Administrator is a new role within Utah Grants. The Administrator has the same access and permissions as the Subrecipient Key Point of Contact, including requesting new users and changing the application owner. The Administrator must be an active user in the Approver role.



The screenshot displays the 'Enterprise Grants Management System' interface. The 'HOME' tab is selected in the top navigation bar. On the left sidebar, 'My Organization/Profile' is expanded, and 'Manage Organization Profile' is highlighted with a red box and a red circle labeled '1'. The main content area shows the 'Overview' tab for a 'School District' organization, with details such as Name (Beaver Co School District), State (UT), and Country (USA). A 'Change Admin' button is visible in the top right corner, highlighted with a red box and a red circle labeled '3'. Below the organization details, the 'Administrator' field is highlighted with a red box and a red circle labeled '2'. A pop-up window titled 'Assign Admin' is open, showing a search field for 'LEA Admin' and a 'Save' button, highlighted with a red box and a red circle labeled '4'.

1. From the Home tab, click Manage Organization Profile on the left.
2. The Administrator will be shown on the organization Overview tab.
3. The Key Point of Contact and the current Administrator will see a “Change Admin” button.
4. A pop-up window will appear. The user is able to select the new administrator and save.

Note: The Administrator will be pre-assigned as the Subrecipient Key Point of Contact. The Key Point of Contact can reassign the role to another active user with a role of “Approver.” Thereafter, the Administrator role can be changed by either the Key Point of Contact or the current Administrator.

The administrator role can request new users, change user permissions, and change application ownership. Additional administrator permissions and responsibilities will be added with future updates.

The Key Point of Contact will continue to be the default Internal Approver on applications and payment requests.