

# Multiple Project Commitments

GrantSolutions Grants Management Module  
November 2018

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## Introduction

Grantors that use commitment accounting can make commitments for multiple projects at the same time for a selected Funding Opportunity Announcement (FOA).

**Note:** Commitments can still be made individually from the “Manage Commitments” screen.

## Announcement Search for Commitments Screen

To search for Funding Opportunities and make commitments for multiple projects at the same time, follow the steps below:

1. Log into the GrantSolutions Grants Management Module ([www.grantsolutions.gov](http://www.grantsolutions.gov)).
2. From the menu bar, select **Funding Opportunities > Manage Commitments for FOA**.

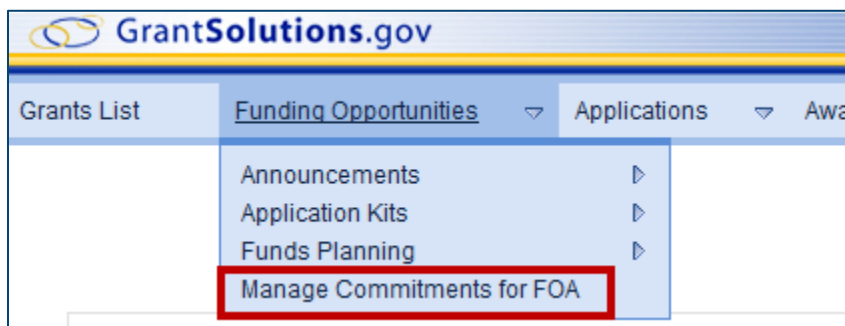
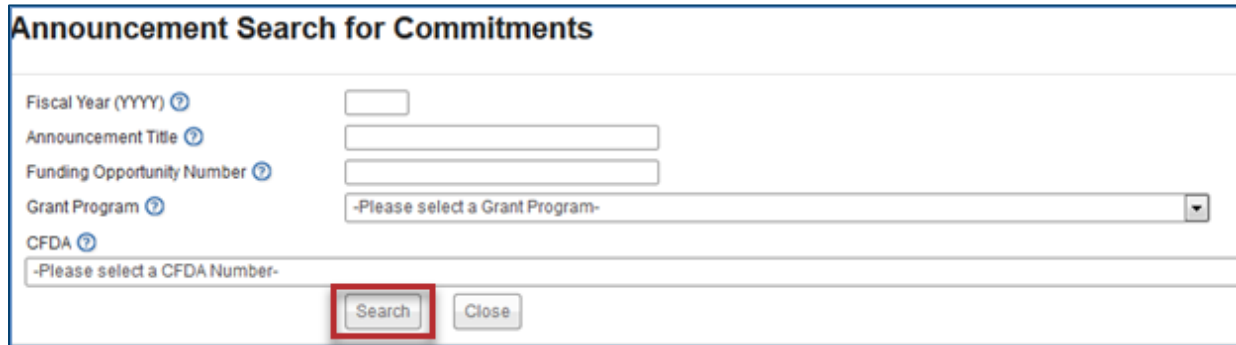


Figure 1: GMM Menu bar: Funding Opportunities - Manage Commitments for FOA

3. The “Announcement Search for Commitments” screen appears. Enter **search criteria** into one or more of the following search fields:
  - *Fiscal Year*
  - *Announcement Title*
  - *Funding Opportunity Number*
  - *Grant Program*
  - *CFDA*

4. Click the **Search** button.



**Announcement Search for Commitments**

Fiscal Year (YYYY)

Announcement Title

Funding Opportunity Number

Grant Program

CFDA

Figure 2: Announcements Search for Commitments screen

5. The screen refreshes and the *Results Table* appears. Only posted announcements for Grant Programs with Commitment Accounting enabled appear. The table contains the following columns:

- *Announcement Title (Internal)*: Internal announcement name with a link to the “Announcement – View” screen
- *Competition ID/Funding Opportunity #*: FOA Competition ID and Funding Opportunity #
- *CFDA*: CFDA number associated with the FOA
- *Program Name*: Name of the Program assigned to the FOA
- *Publish Date*: FOA Publish date
- *Due Date*: Date the Application submission is due
- *Status*: FOA status is always *Posted*
- *Action*: Contains a link to the “Manage Commitments” screen for the desired FOA

**Announcement Search for Commitments**

Fiscal Year (YYYY)   
 Announcement Title   
 Funding Opportunity Number   
 Grant Program   
 CFDA

Number of Announcements: 63 Only posted announcements will be returned.

Announcement Title (Internal)	Competition ID / Funding Opportunity #	CFDA	Program Name	Publish Date	Due Date	Status	Action
<a href="#">FY2017</a>				06/16/2017	12/31/2017	Posted	<a href="#">Manage Commitments</a>

Figure 3: Announcements Search for Commitments screen - Results Table

- To add, update, or view commitments, click the **Manage Commitments** link from the *Action* column.

Number of Announcements: 63 Only posted announcements will be returned.

Announcement Title (Internal)	Competition ID / Funding Opportunity #	CFDA	Program Name	Publish Date	Due Date	Status	Action
<a href="#">FY2017</a>				06/16/2017	12/31/2017	Posted	<a href="#">Manage Commitments</a>

Figure 4: Manage Commitment link

- The “Commitment Summary” screen appears. Commitments created by specific object class and financial account combinations appear in the table.

Commitment Summary for

Program: Community       Announcement: FY17   
 CFDA:       Grant Program: Housing

Show  entries Previous   Next

Showing 0 to 0 of 0 entries

Fiscal Year	Object Class	Financial Account	Reconciled Amount	Unreconciled Amount	Action
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Figure 5: Commitment Summary screen

## Commitment Summary Screen

The Commitment Summary screen contains the following information and actions:

- Click the **Create New** button to select an *Object Class* and *Financial Account* for the Commitments

- View all current year Commitments at the *Object Class* and *Financial Account* summary level for an announcement
- Each row shows the total *Reconciled* and *Unreconciled* commitment amounts for the unique combination of the Object Class and Financial Account number
- Towards the top of the page, users can modify the number of records displayed on the screen by selecting a number from the *Show Entries* drop-down list
- The *Page Total* field shows the dollar amount of all records currently listed in the Summary Table. Change the number of records listed on the screen for an updated Total.
- From the *Action* column, the **Edit** link allows users to create or update commitments
- From the *Action* column, the **Details** link allows users to view all commitments made for a particular *Object Class* and *Financial Account*

To view the details of all Commitments made for a particular *Object Class* and *Financial Account* for a FOA:

1. From the *Action* column, click the **Details** link to view information for all commitment projects/applications.

Fiscal Year	Object Class	Financial Account	Reconciled Amount	Unreconciled Amount	Action
	41		\$0.00	\$1,000.00	<a href="#">Edit Details</a>
	41		\$0.00	\$107,215.00	<a href="#">Edit Details</a>
	41		\$0.00	\$150,300.00	<a href="#">Edit Details</a>

Figure 6: Commitment Summary screen - Details link

2. The “Commitment Details” screen appears. Two tabs contain the *Unreconciled Transactions* and *Reconciled Transactions* information.

Commitment Details for

Program:

Announcement: DP15-1513- BEHAVIORAL RISK FACTOR SURVEILLANCE SYSTEM (BRFSS)

CFDA:

Grant Program: DP15-1513 BEHAVIORAL RISK FACTOR SURVEILLANCE SYSTEM (BRFSS)

Fiscal Year: 2016

Object Class: 41.51

Financial Account: CDCFU20

Unreconciled Transactions

Reconciled Transactions

Close Details

Show 100 entries

Previous 1 Next

Showing 1 to 7 of 7 entries

Project Number	Application Number	CDN	Organization	Status	Last Transition Date	Amount	Action
6015	N/A	6015	Department of Public Health	Created In Accounting		\$100.00	<a href="#">History</a>
6015	N/A	6015	Department of Public Health	Created In Accounting		\$-100.00	<a href="#">History</a>
6015	N/A	6015	Department of Public Health	Ready For Approval		\$100,000.00	<a href="#">History</a>
6016	N/A	6016	Depart of Health	Ready For Approval		\$50,000.00	<a href="#">History</a>
6017	N/A	6017	DEPARTMENT OF HEALTH	Created In Accounting		\$100.00	<a href="#">History</a>
6019	N/A	6019	DEPARTMENT OF HEALTH	Created In Accounting		\$100.00	<a href="#">History</a>
6021	N/A	6021	STATE	Created In Accounting		\$100.00	<a href="#">History</a>

Page Total: \$150,300.00

Figure 7: Commitment Details screen

3. To view the commitment history, click the **History** link from the *Action* column.

- To view all commitments for a project in a new window, click the **Commitment Document Number (CDN)** link .

Project Commitment Details					
Commitment Document Number: <a href="#">XXXXXXXXXX</a>					<a href="#">Close</a>
<div>Unreconciled Transactions</div> <div>Reconciled Transactions</div>					
Fiscal Year	Object Class	Financial Account	Amount	Workflow Status	Last Updated Date
		9210031	\$1,250,000.00	Created In Accounting	03/15/2016 05:35:25 PM
Total:			\$1,250,000.00		

Figure 8: Project Commitment Details screen

- From the “Project Commitment Details” screen, click the **Close Details** button to return to the “Commitment Summary” screen.

**Note:** The “Commitment Details” screen displays every current year commitment made for the selected *Object Class* and *Financial Account*.

## Create New and Manage Commitments

CREATE NEW OBJECT CLASS AND FINANCIAL ACCOUNT COMBINATION FOR FOA

To create a new Object Class and Financial Account combination for a FOA:

- From the “Commitment Summary” screen, click the **Create New** button.

Commitment Summary for

Program: Announcement:

CFDA: Grant Program:

Show 

100

 entries

Previous

1

Showing 1 to 3 of 3 entries

Fiscal Year	Object Class	Financial Account	Reconciled Amount	Unreconciled Amount	Action
<div></div>	<div></div>	<div></div>	\$0.00	\$1,000.00	<a href="#">Edit Details</a>
<div></div>	<div></div>	<div></div>	\$0.00	\$107,215.00	<a href="#">Edit Details</a>
<div></div>	<div></div>	<div></div>	\$0.00	\$150,300.00	<a href="#">Edit Details</a>
Page Total:			\$0.00	\$258,515.00	

Create New

Close

Figure 9: Commitment Summary screen - Create New button



- The “Add Object Class/Financial Account” screen appears in a new window. Select an **Object Class** from the drop-down menu and enter a **Financial Account**.
- Click the **Manage Commitments** button.

Figure 10: Add Object Class/Financial Account screen

- The “Manage Commitments” screen opens and all approved applications for a FOA appear.
- Note:** Applications are approved on the “Application Recommendation” screen.
- From the *Amount* column, enter the **dollar amount** for each Commitment.

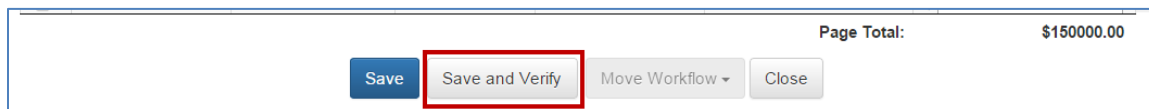
Project Number	Application Number	CDN	Organization	Status	Amount
6015	N/A	6015	Department of Public Health	Ready For Approval	\$ 100000.00
6016	N/A	6016	Department of Health & Social Services	Ready For Approval	\$ 50000.00
6017	N/A	6017	DEPARTMENT OF HEALTH		\$
6018	N/A	6018	Department of Health Services		\$
6019	N/A	6019	DEPARTMENT OF HEALTH		\$
6020	N/A	6020	Department of Public Health and...		\$
6021	N/A	6021	STATE		\$
6022	N/A	6022	HEALTH AND WELFARE,		\$
6023	N/A	6023	Department of Public Health		\$

Figure 11: Manage Commitments screen

**Note:** Up to 100 commitments can be entered at a time. The *Project Number* field is blank if an award is not yet drafted. Once an award is drafted, the system displays the Project Number and shows N/A in the *Application Number* field. The *Commitment Document Number (CDN)* field is blank until the first commitment is saved.

**Tip:** Click a **Commitment Document Number (CDN)** link to view all commitments for a project.

6. Once the desired commitment amounts are entered, click the **Save and Verify** button.



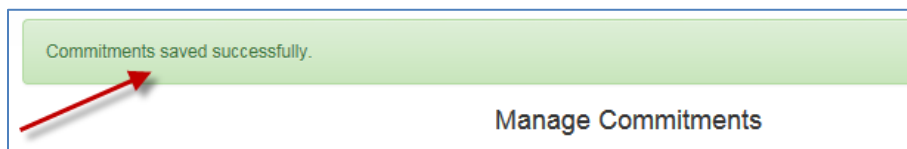
The screenshot shows a horizontal bar at the top of the Manage Commitments screen. On the right side, it displays "Page Total: \$150000.00". Below this, there are four buttons: "Save" (blue), "Save and Verify" (white with a red border), "Move Workflow" (grey with a dropdown arrow), and "Close" (grey).

Figure 12: Manage Commitments screen - Save and Verify

If there are issues, the following error messages may appear:

- "Object Class Code for all commitments with the same Fiscal Year and Commitment Document Number must match for this project."
- "First Commitment for Fiscal Year, Object Class, and Financial Account for this project cannot be negative."
- "Funds check error."

7. If there are no errors, a message appears stating, "Commitments Saved Successfully."



The screenshot shows a green message box at the top of the Manage Commitments screen with the text "Commitments saved successfully." A red arrow points to the message box. Below the message box, the text "Manage Commitments" is visible.

Figure 13: Manage Commitments screen -Commitments saved successfully message

8. Select the **checkboxes** next to the commitments that are ready to move forward in the workflow.

<input type="checkbox"/>	Project Number	Application Number	CDN	Organization	Status
					All
<input type="checkbox"/>	6015	N/A	6015	Alabama Department of Public Health	Ready For Approval
<input type="checkbox"/>	6016	N/A	6016	Depart of Health & Socia...	Ready For Approval
<input type="checkbox"/>	6017	N/A	6017	DEPARTMENT OF HEALTH	
<input type="checkbox"/>	6018	N/A	6018	Department of Health Services	
<input type="checkbox"/>	6019	N/A	6019	DEPARTMENT OF HEALTH	
<input type="checkbox"/>	6020	N/A	6020	Department of Public Health and...	
<input type="checkbox"/>	6021	N/A	6021	STATE	
<input type="checkbox"/>	6022	N/A	6022	HEALTH AND WELFARE,	
<input type="checkbox"/>	6023	N/A	6023	Department of Public Health	

Page 1

Figure 14: Manage Commitments screen - checkboxes for selection

**Note:** Checkboxes are only available for selection if a dollar amount is entered and saved.

9. To transition all Commitments listed on the screen at one time, click the **Move Workflow** button.

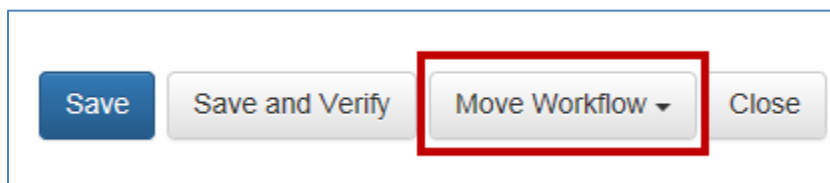


Figure 15: Move Workflow button

10. Toward the top of the screen, a message appears stating that the “*Workflow transition completed successfully.*” Continue with the Workflow process as needed.

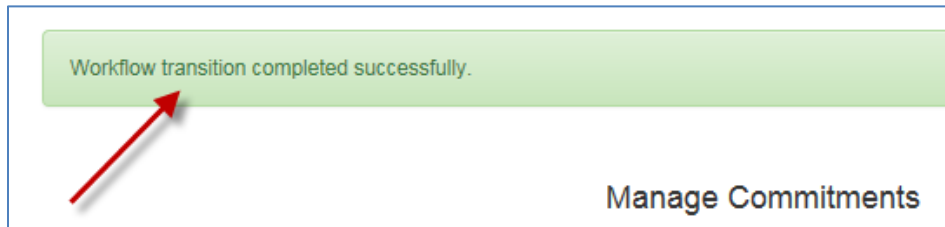


Figure 16: Workflow transition completed successfully message

11. To return to the “Commitment Summary” screen, click the **Close** button towards the bottom of the screen.

**Note:** When Commitments are sent forward in the workflow, users with the authority to approve Commitments receive email notification from GrantSolutions.

The message is as follows:

**Subject**

Approve Commitments

**Message Body:**

On [Date], the commitment transactions have been entered and verified by [Name of user that selected "Ready for Approval" ]:

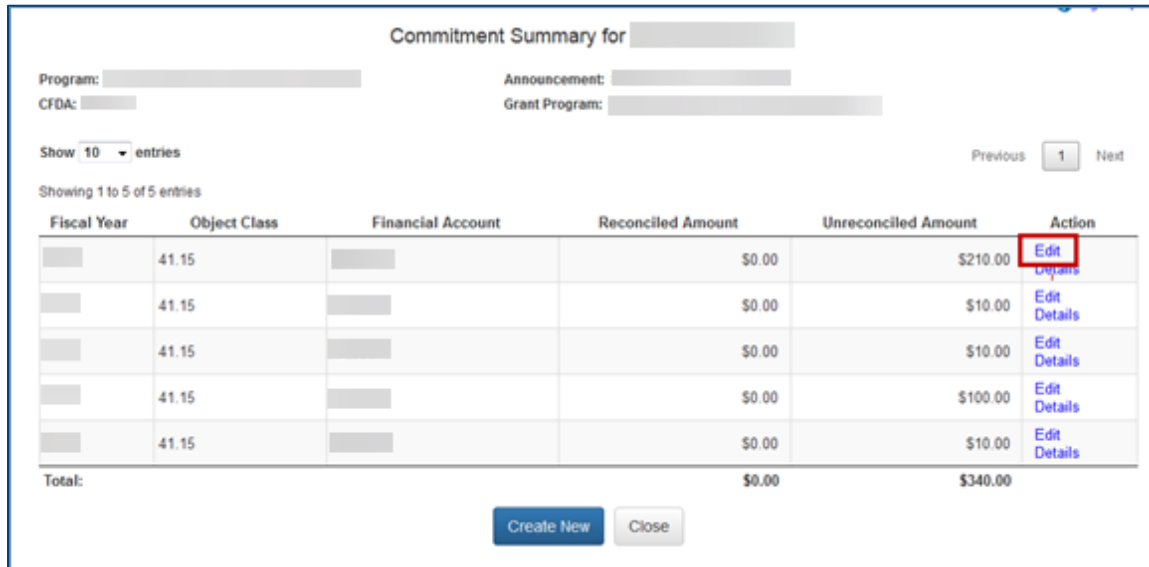
FOA: [FOA Name]

Commitment accounting is required for this grant program. To approve the commitment for this application please use the following URL.

[Web address]

## EDIT/DELETE COMMITMENTS

To create, edit, or delete Commitments for an existing Financial Account and Object Class, click the **Edit** link from the “Commitment Summary” screen.



Commitment Summary for [redacted]

Program: [redacted] Announcement: [redacted]  
CFDA: [redacted] Grant Program: [redacted]

Show 10 entries Previous 1 Next

Showing 1 to 5 of 5 entries

Fiscal Year	Object Class	Financial Account	Reconciled Amount	Unreconciled Amount	Action
[redacted]	41.15	[redacted]	\$0.00	\$210.00	<a href="#">Edit</a>
[redacted]	41.15	[redacted]	\$0.00	\$10.00	<a href="#">Edit Details</a>
[redacted]	41.15	[redacted]	\$0.00	\$10.00	<a href="#">Edit Details</a>
[redacted]	41.15	[redacted]	\$0.00	\$100.00	<a href="#">Edit Details</a>
[redacted]	41.15	[redacted]	\$0.00	\$10.00	<a href="#">Edit Details</a>
Total:			\$0.00	\$340.00	

Create New Close

Figure 17: Commitment Summary screen - Edit link

**Note:** To delete a Commitment, enter **\$0** in the *Amount* column.

After changes are made to the Commitment, click the **Save and Verify** button and continue moving through the Workflow.

The “Manage Commitments” screen only displays Commitments that are available for editing. Once a Commitment is approved, it becomes read-only and is moved to the “Commitment Detail” screen.