EMGrantsPro Introduction (Version 4)

This document provides an overview of the most significant advantages available when upgrading from MB3 PA/HM Portal v3 to v4 (now referred to as EMGrantsPro).

Summary

1) User Interface	There have been several significant interface updates in v4, making the system not only more visually appealing, but easier and faster to use.
2) My Inbox	A new email feature, My Inbox, centralizes all communication and required actions, from workflow items to messages.
3) Collaboration Options	Plenty of new collaboration options exist including internal messages, mass emails (even to State users), addressed notes, issue management, and meeting scheduling.
4) Issue Management	Issues may be created on any item in the system to log problem details and manage the resolution through specifying recipients and adding timelines.
5) Payment Architecture Redesign	The entire payment process has been completely redesigned, with differentiation between payables and receivables.
6) Expense Management & Reimbursement Requests	Expenses may now be managed independent of Reimbursement Requests. Adjustments to expenses and funding requests are also logged with many new features.
7) Inherited Item Actions	There is now a hierarchical relationship with holds and deleting so child items inherit what happens to the parent (for example, putting an account on hold will make the payments for that account on hold).
8) Integrated Help	There is now integrated help in the system to provide page-specific resources.

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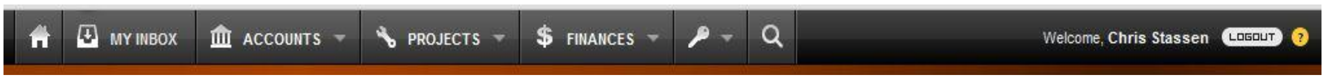
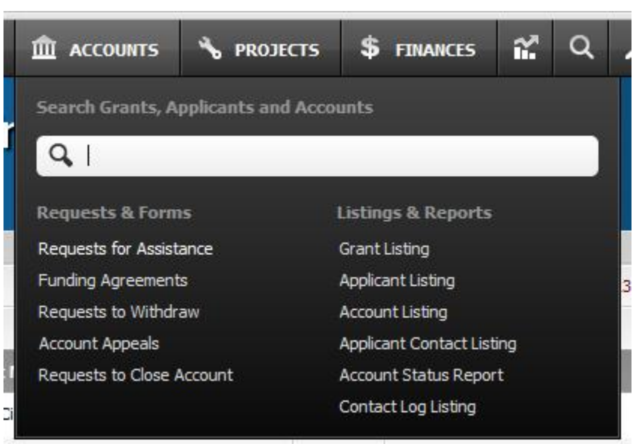
Detail

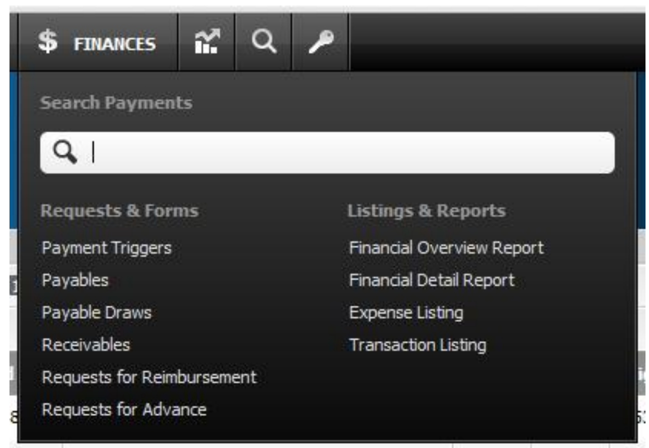
1) User Interface

There have been several significant interface updates in v4, making the system not only more visually appealing, but easier and faster to use. Here are some highlights:

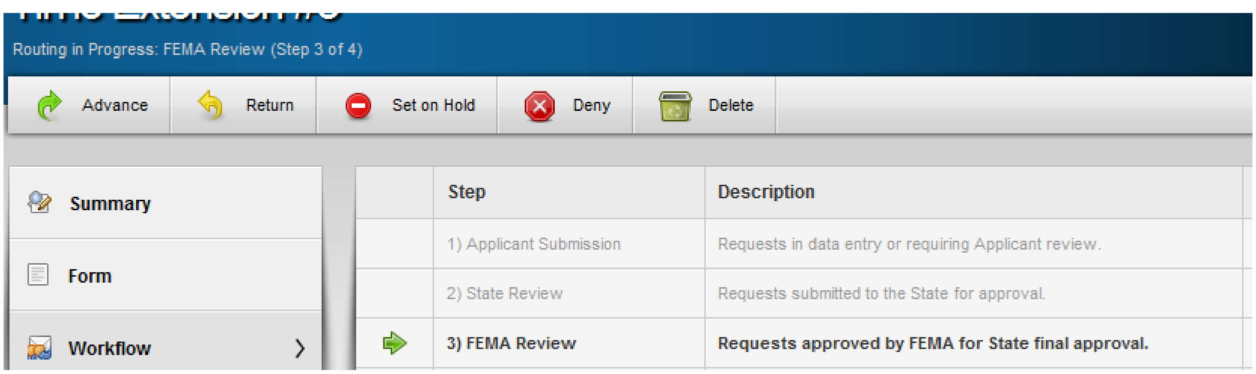
1. The new Main Menu Bar provides more options, including a newly improved Quick Search feature. The Main Menu Bar is now locked to the top of the screen so you always have it available.



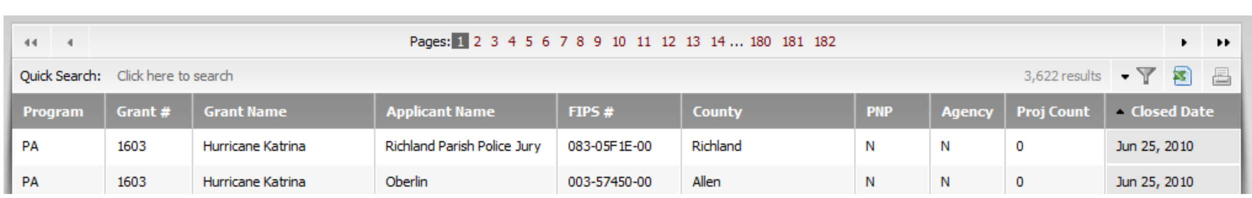




2. Workflow and item actions are now more clearly organized and also locked to the screen so always visible.



3. List controls are now easier to use and paging shows at the top and bottom of the list.



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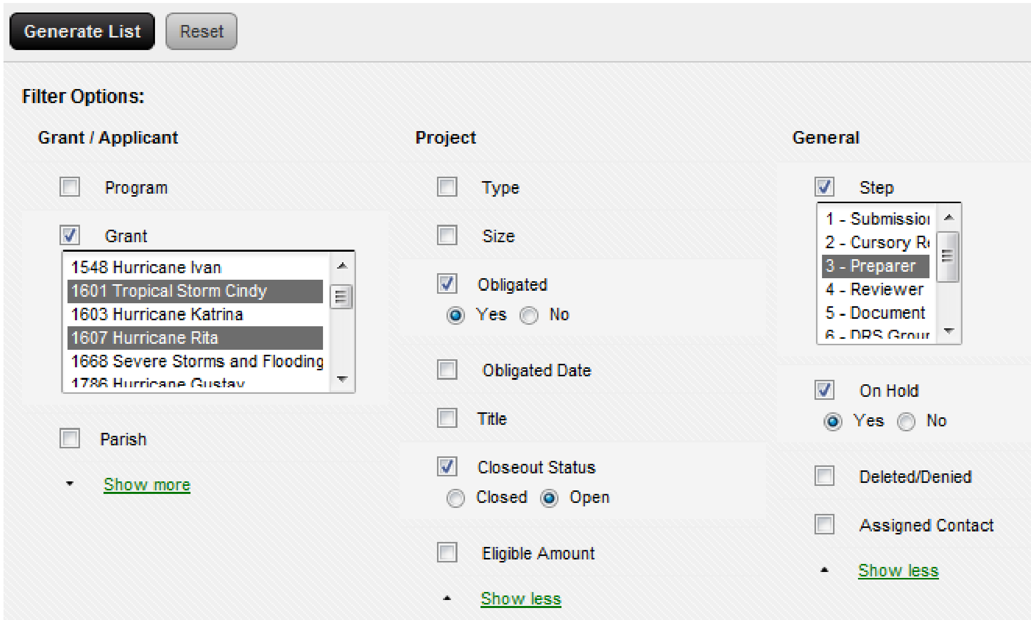
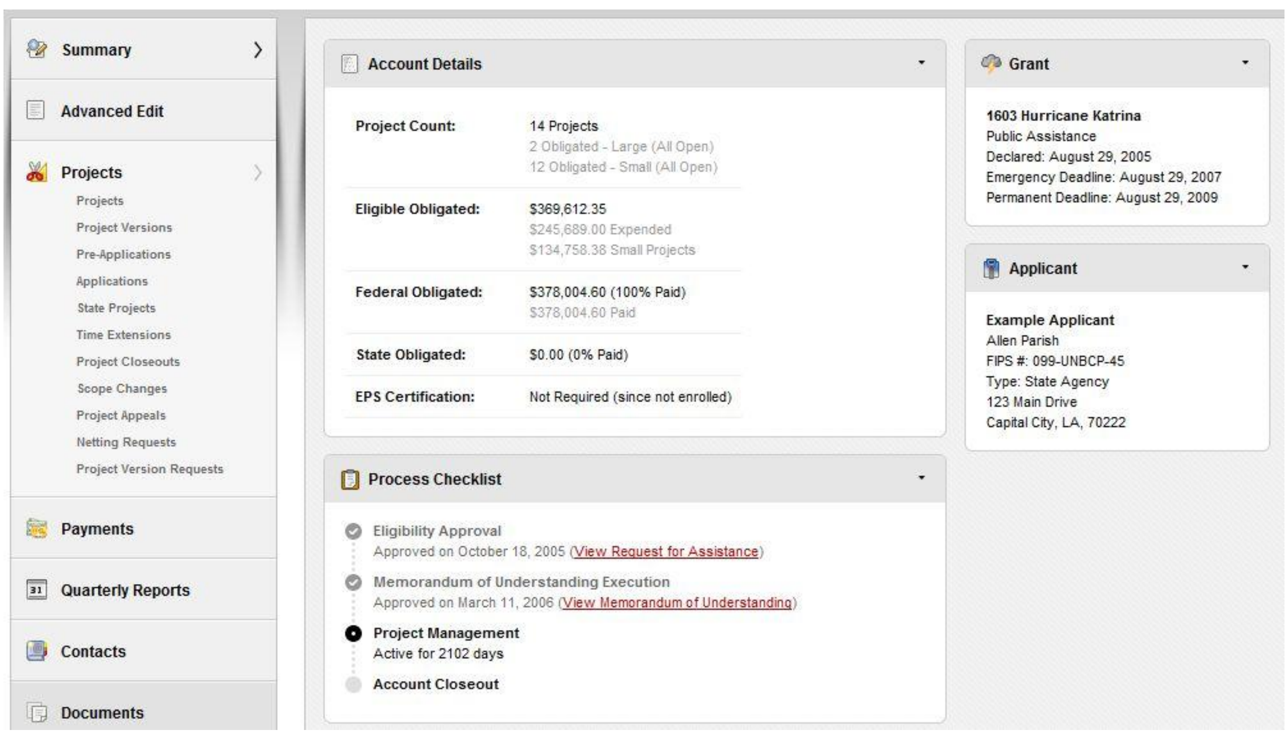
4. Filters are more powerful, and consistent throughout the system.



5. All account/project requests now have a **Summary** screen for quickly learning the highlights of the request (especially useful for QRs).



6. The system has been designed to be more accessible and compatible across more browsers and devices (including PDAs).

7. The system width is now locked at 1024 pixels (instead of 800 which every screen in v3 needed to work with), which not only provided more control in page design but also more useable space for lists with larger numbers of columns.

2) My Inbox

To centralize all communication and required user actions, **My Inbox** has been created to resemble an Email inbox and list exactly what needs to be done. Unlike the initial move towards an inbox in v3, where only assigned workflow queue totals would show, this inbox contains the actual workflow items where you are a recipient (almost like emails), plus tracked items where the action happened, issues needing resolution, meeting logs needing minutes, addressed notes, and messages. **My Inbox** is available as a quick drop down list with the ability to view a more detailed list.

3) Collaboration Options

The options for collaboration have increased significantly; this is especially beneficial to organizations with larger numbers of employees. The following options now exist:

1. Internal messages can be sent to individual people or groups of people.
2. Group emails can be sent to anyone including State users/groups (while all logged).
3. Notes placed on items like payments or QRs can be optionally addressed to someone or a group.
4. Issues can be flagged and the resolution can be the responsibility of specific users or groups.
5. Meetings can be scheduled in advance, in addition to being logged after-the-fact.

4) Issue Management

In v3, notes could be set to "unresolved" and a date entered for when the resolution was due. In v4, this concept has been greatly broadened so that descriptive issues can be added to any system item (such as a Project or Request). The issue is added with a description, due date, but can also be assigned to specific users or groups to ensure a timely resolution. With all of this data, a new Issue list report has powerful filters to highlight just what needs attention.

5) Payment Architecture Redesign (Payables & Receivables)

The entire payment process has been rebuilt from the ground up and the most noticeable change to the payment architecture is Payables and Receivables. Payables (i.e. payments with a positive net balance) can now have a completely different workflow path than Receivables (i.e. payments with a negative net balance).

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6) Expense Management and Reimbursement Requests

Expenses may now be independent of Reimbursement Requests to allow tracking project costs for even small projects. Then, when a Reimbursement Request is being created, one can either select from expenses already entered (but not requested), or enter new expenses (as in v3).

7) Inherited Item Actions

When items are placed on hold or deleted in v3, only that item goes on hold. For example, deleting an Account does not delete any account requests within that account. Now, there is a hierarchical relationship with holds and deleting so that children items inherit the same status as the parent. For example, if a Project is placed on hold, any requests or payments on that Project will also show as on hold, with a reference to the parent as the reason to be on hold.

8) Integrated Help

Instead of linking to a static help guide as in v3, the help options in v4 are much more helpful. Depending on the page or section of the system, specific help may be available, including tutorials and frequently asked questions.