

3.0 Appendix B – Project Aspire Enhancement Functional Design

ADML ID	1919
ADML Description	CSFA and CFDA Required Edit
ADML Tech #	

3.1 Background

3.1.1 Functional Requirement

In accordance with the Florida Single Audit Act (Section 215.97), all “State Projects”, defined as all state financial assistance to a non-state entity, must be assigned a single state project number identifier in the Catalog of State Financial Assistance (CSFA number).

In accordance with the Federal OMB Circular A-133, all Federal awards received and expended and the Federal programs under which they were received shall include, as applicable, the Catalog of Domestic Federal Assistance (CFDA) title and number. The CFDA is required in order to create the Schedule of Expenditures of Federal Awards (SEFA).

3.1.2 Delivered Functionality

There is no delivered functionality in Aspire to perform Project Type and CSFA/CFDA edits.

3.1.3 Gap Description

The delivered Aspire application does not provide functionality that edits against the Project Type and CFDA or CSFA value. As a result, a user would be able to create State and Federally funded projects without entering a CSFA or CFDA number.

3.2 Description of New Functionality

This customization will add two Y/N flags to the Project Type page which will indicate whether a project type requires a CSFA or CFDA number. Only one flag can be set to ‘Y’ at any given time. The default will be to have both flags set to ‘N’.

When creating a state project that requires a CSFA (CSFA required flag set to 'Y' on the project type definition record), an error will be issued stating that a CSFA must be entered before the project can be saved. If the project type for an existing project is changed to one that requires a CFDA, then an edit will be performed to determine if the project is linked to a revenue contract that has an award profile. If an award profile is found and there is no CFDA defined, an error will be issued that states the project is linked to an award profile and cannot be saved until a CFDA number is defined on the award profile. Because of the process flow for creating a grant in Aspire, this customization will not prevent adding a project with a project type that requires a CFDA number, but will prevent adding an award profile without the CFDA being defined. An edit will be performed at the time of creating the award profile to determine if the award profile requires a CFDA based on the projects linked to it.

A new field to capture CFDA will be added to the Revenue Contract page where the award is created. When the 'Create Award Profile' button on the revenue contract definition page is pressed, an edit will be performed that will determine if the award profile requires a CFDA based on the projects linked to the revenue contract in the CA_DETAIL_PROJ record. The CFDA field will be required if any project linked to the revenue contract requires a CFDA value. The user will not be able to create the award unless the CFDA value is populated.

An edit will be added to the Award Profile page that will require CFDA be populated if any project linked to the revenue contract/award has a project type that requires a CFDA number (CFDA required flag set to 'Y' on the project type definition record).

3.3 Navigation path

Project Type:

Set Up Financials/Supply Chain > Product Related > Project Costing > Project Options > Project Types

Project Definition (2 different navigations):

Project Costing > Project Definitions > General Information **OR**

Grants > Awards > Project > General Information

Revenue Contract (Create Award Profile):

Customer Contracts > Create and Amend > General Information > Additional Information

Award Profile:

Grants > Awards > Award Profile > Profile

3.4 Set Up/Control Data

- Set CSFA value required flag to Y for STPRJ project type
- Set CFDA value required flag to Y for FDCHC, FDDST, FDGFC, FDGHD, and FDGRT project types

3.5 Application Changes (e.g., Pages, Components, Menus, Records, App Engines, SQRs, etc.)

- Add two custom Y/N fields to the PROJ_TYPE_TBL record and the PROJ_TYPE_DEFN page. These fields are required and the default for both fields is 'N'. Only one field can be set to 'Y' at any given time. Issue an error stating that both fields cannot be selected at one time.
- Add edits to the PROJECT record
 - If adding a new project, and the PROJECT.PROJECT_TYPE value is one that requires a CSFA number (CSFA required flag set to 'Y' on the project type definition record), then modify delivered security on the Project Definition Component to allow the user to go to the PC_PROJ_USER prior to saving the project, then send user to the PC_PROJ_USER page, and issue error message stating, "This project has been defined as a State Project requiring a CSFA value. Please enter valid CSFA to save project."
 - If updating an existing project, and the PROJECT.PROJECT_TYPE value is one that requires a CSFA number (CSFA required flag set to 'Y' on the project type definition record) and no CSFA number is defined, then issue error message stating, "This project has been defined as a State Project requiring a CSFA value. Please enter valid CSFA to save project."
 - If updating an existing project, and the PROJECT.PROJECT_TYPE value is one that requires a CFDA number (CFDA required flag set to 'Y' on the project type definition record), and the project is linked to a Revenue Contract that has an Award Profile (GM_AWARD.CONTRACT_NUM) that does not have a CFDA number defined, then issue an error stating, "This project has been defined as a Federally Funded Project requiring a CFDA number and is linked to an Award that does not have a CFDA. You must enter a CFDA

number on the Award Profile for Award XXXX before this project can be saved.” (XXXX = GM_AWARD.CONTRACT_NUM)

- Modify the “Create Award Profile” process by adding an edit that will determine if the award profile requires a CFDA based on the projects linked to the revenue contract in the CA_DETAIL_PROJ record.
 - Add CFDA field to the Revenue Contract Additional Information page (CA_HDR_OTHER_INFO). The prompt for this field should be the FL_CFDA_TBL record.
 - If none of the projects linked to the revenue contract have a project type that requires a CFDA (CFDA required flag set to ‘N’ on the project type definition record), then the delivered ‘Create Award Profile’ functionality will be executed which will create and automatically save the award profile in the GM_AWARD record and hide the ‘Create Award Profile’ button on the revenue contract additional information page.
 - If any project linked to the contract has a project type that requires a CFDA (CFDA required flag set to ‘Y’ on the project type definition record), then an error will be generated that states, “This award has been defined as being federally funded requiring a CFDA number. You must enter a CFDA number before this award can be saved”. The CFDA field and “Create Award Profile” buttons should still be visible if no award profile is created. When a valid CFDA is entered on the Additional Information page and the “Create Award Profile” button is pressed, the delivered ‘Create Award Profile’ functionality will be executed which will create and automatically save the award profile in the GM_AWARD record and hide the ‘Create Award Profile’ button and CFDA field on the revenue contract additional information page.
- Add edit to the GM_AWARD record
 - If any project linked to the Award (CONTRACT_NUM) in the CA_DETAIL_PROJ record has a PROJECT.PROJECT_TYPE value that requires a CFDA number (CFDA required flag set to ‘Y’ on the project type definition record) and the GM_AWARD.CFDA field is blank, then issue error message stating, “This Award has been defined as a Federally Funded Award requiring a CFDA value. Please enter valid CFDA to save Award.”
- Add edits to the CA_DETAIL_PROJ record
 - If PROJECT.PROJECT_TYPE value on any project linked the Revenue Contract (CA_DETAIL_PROJ) is one that requires a CFDA value, and there is an existing Award Profile for the Contract (GM_AWARD.CONTRACT_NUM), then issue error stating, “One or more

of the Projects you are attempting to link to the Revenue Contract has been defined as a Federally Funded Project requiring a CFDA value. You must enter a CFDA value on the Award Profile for Award XXXX before the project can be linked to the Revenue Contract.”

3.6 Unit Test Considerations

- Add a project type and do not select either of the flags. Verify that the values for both fields are set to ‘N’ in the PROJ_TYPE_TBL record.
- Add a project type and verify that only one of the flags can be selected. Verify value in PROJ_TYPE_TBL is ‘Y’ for flag selected and ‘N’ for the other flag.
- Add a Project online with a Project Type of STPRJ (State Project) and no CSFA value. Verify an error is received and project cannot be saved.
- Add a Project online with a Project Type of STPRJ and a valid CSFA value. Verify project can be saved.
- Add a Project online with a Project Type of FDGRT. Verify project can be saved.
- Select an existing project that has a project type that does not require a CFDA or CSFA number and is linked to a revenue contract with an award that does not have a CFDA. Change the project type to one that requires a CFDA number. Verify that an error is received that states, “This project has been defined as a Federally Funded Project requiring a CFDA number and is linked to an Award that does not have a CFDA. You must enter a CFDA number on the Award Profile for Award XXXX before this project can be saved.”
- Create a federal grant by adding a revenue contract, adding one project with a project type of FDGRT and one project with a project type of FDCFC (this project type should not require a CFDA), adding the FEDERAL_I activity to each of the projects, and linking projects and activities to the revenue contract. Do not enter a CFDA number on the Additional Information page. Press the “Create Award Profile” button and verify that an error is received that states a CFDA is required. Verify that the award profile is not created. Do not enter a CFDA and exit the page. Verify that the Award Profile is not saved and the “Create Award Profile” button and CFDA field are still visible on the revenue contract additional information page.
- Create a federal grant by adding a revenue contract, adding one project with a project type of FDGRT and one project with a project type of FDCFC (this project type should not require a CFDA), adding the FEDERAL_I activity to each of the projects, and linking projects and activities to the revenue contract. Enter valid CFDA number on the additional information page and press the “Create Award Profile” button.

Verify that the Award Profile is created, the CFDA number is populated on the Award Profile page, and the “Create Award Profile” button and CFDA field are no longer visible on the revenue contract additional information page.

- Create a private grant by adding a revenue contract, adding a project with a project type that does not require a CFDA or CSFA number, adding the LOCAL_NONMATCH activity to the project, linking project and activity to the revenue contract. Do not enter a CFDA number and press the “Create Award Profile” button. Verify that the CFDA required error is not issued, the Award Profile is created, and the Create Award Profile button and CFDA field are no longer visible on the revenue contract additional information page.
- Delete the CFDA value on the Award Profile page for an Award that has multiple projects linked to it with one project having a project type that requires a CFDA number. Verify an error message is received that states, “This Award has been defined as a Federally Funded Award requiring a CFDA value. Please enter valid CFDA to save Award.” And that the Award Profile cannot be saved. Re-enter the CFDA value, and verify that the Award Profile can be saved.
- Link a project with a project type that requires a CFDA number to a revenue contract that has an award with no CFDA defined. Verify that an error is received that states, “One or more of the Projects you are attempting to link to the Revenue Contract has been defined as a Federally Funded Project requiring a CFDA value. You must enter a CFDA value on the Award Profile for Award XXXX before the project can be linked to the Revenue Contract.” Go to the award profile and enter a CFDA number. Go back to the revenue contract and link the project. Verify that the project can be linked to the revenue contract.

3.7 Miscellaneous

- Because of the process flow for creating a grant in Aspire, this customization will not prevent adding a project with a project type that requires a CFDA number, but will prevent adding an award profile without the CFDA being defined.

3.8 Assumptions

- Project Types will be created and maintained by DFS at the enterprise level.
- Once a project type is defined as requiring a CSFA or CFDA number, the project type should not be changed. If this flag is changed and projects and/or awards already exist, the new edits will not be enforced automatically for the existing projects and/or awards. When those projects and awards are updated, the new edits will be enforced.

- Project and Grant related conversion and interface programs will be modified to incorporate the same edits as described in this ADML (See ADMLs 154 - Grant Master File Inbound Interface, 156 – Grant Definition Conversion, 159 – Project Definition Conversion, 765 – Project master File Inbound Interface, 1830 – Link Projects to Revenue Contracts).
- The CSFA/CFDA required edit will be incorporated in the following ADMLs: 154, 156, 159, 765, and 1830.