

# GrantVantage<sup>®</sup>



**ATTACHMENT A**

**DDS Applicant Instructions**

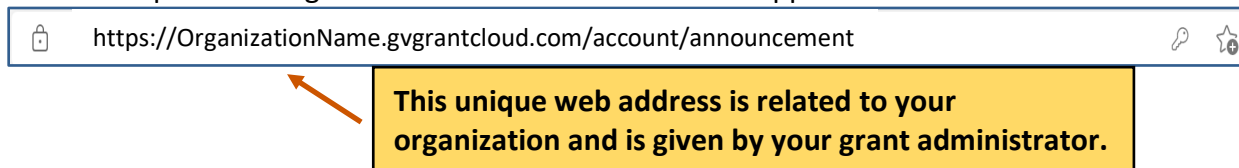
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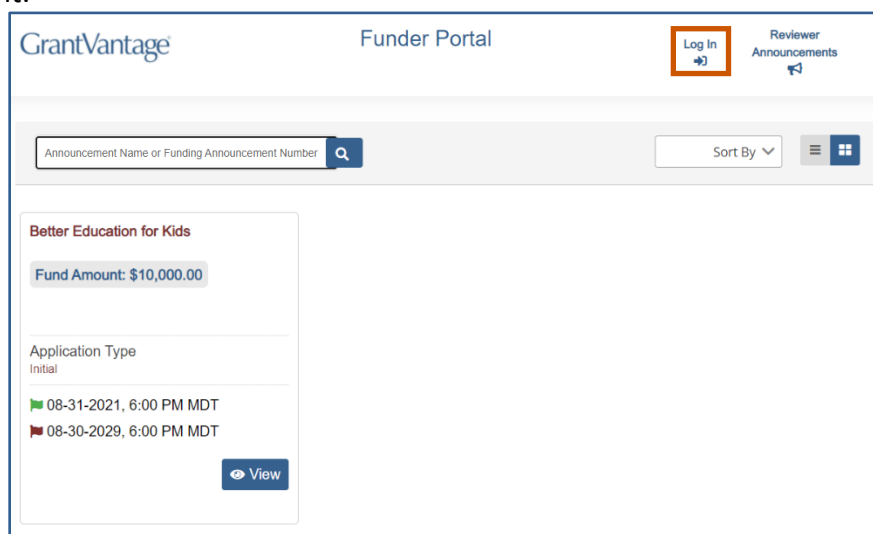
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## Login

1. Open preferred web browser.
2. In the URL field of the web browser, enter the web address provided by GrantVantage. The public-facing view of the Funder Portal screen appears.

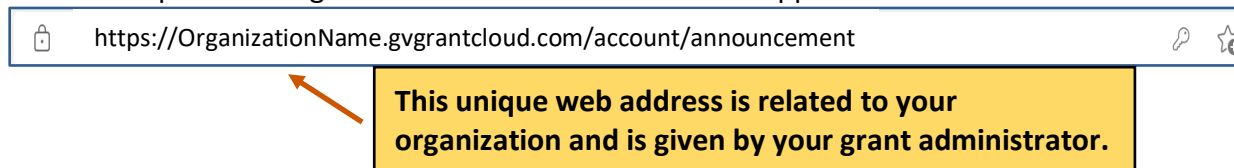



3. Click **Log In** . The Log In screen appears. From the Log In screen, returning applicant users may login to the system. New applicants must create a new applicant user account.

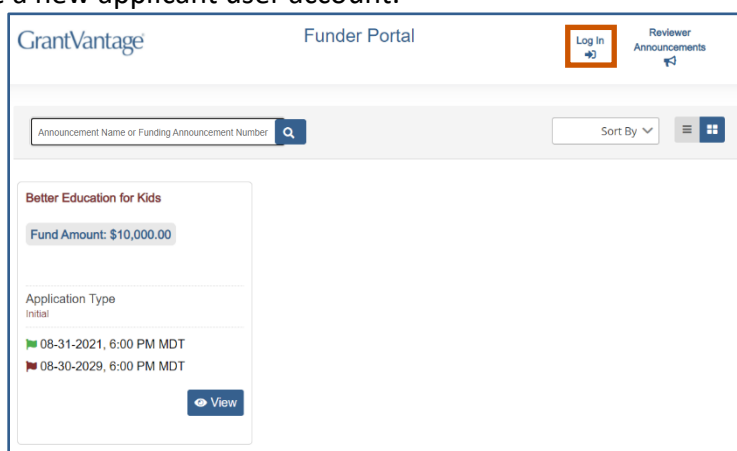


## Register

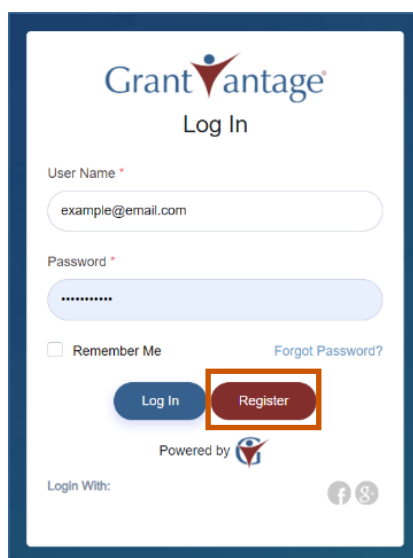
1. Open preferred web browser.
2. In the URL field of the web browser, enter the web address provided by GrantVantage. The public-facing view of the Funder Portal screen appears.





3. Click **Log In** . The Log In screen appears. From the Log In screen, new applicants must create a new applicant user account.



4. Click **Register**. You can now begin the registration process.



5. Fill in the necessary fields.  
 **Note:** The black asterisks indicate required fields.

6. Click **Submit** . You are logged in, and the GrantVantage Funder Portal homepage appears. The homepage displays all available funding announcements. Applicants may navigate the system by using the site map.

### Applicant Registration

Organization \*

Organization Type \*

First Name \*

This field is required.

Last Name \*

Email Address \*

This field is required.

User Name \*

This field is required.


Password

Password (repeat)

• Passwords do not match!

Please prove you are not a robot

☐ I'm not a robot

  
reCAPTCHA  
Privacy • Terms

## Homepage

On the homepage, you can view all published funding announcement opportunities, opportunities you have applied for, your profile, and view users, properties, and documents related to the application.

The screenshot shows the Applicant homepage for 'Obi-wan Organization'. The interface includes a left sidebar with navigation options: Funding Announcement, My Application, My Applicant Profile, Users, Contacts, and Documents. The main content area displays a search bar, a 'Sort By' dropdown menu, and a list of funding announcements. A specific announcement titled 'Better Education for Kids' is highlighted, showing details like 'Fund Amount: \$10,000.00', 'Application Type: Initial', and two dates: '08-31-2021, 6:00 PM MDT' and '08-30-2029, 6:00 PM MDT'. At the bottom of the announcement card are 'Save' and 'View' buttons.

**Use the search bar to choose an announcement.**

**Choose the view display for the announcement**

**Displays the basic announcement information**





**Use the Sort By drop-down list to sort the announcement**

**Site map**

**Save the announcement to the My Application section of the site map or view the announcement**

## Site Map

The site map displays navigation options relating to the applicant, such as the applicant profile, the internal users, and the contacts. The Applicant site map links to the Funding Announcement and My Applications pages, which opens the applicant dashboards.

Applicant Kings County	Site Map Options	Description
 Funding Announcement	<b>Funding Announcement</b> 	Displays all published announcements.
 My Application	<b>My Application</b> 	Displays all the announcements you have saved and/or applied to.

<div>Applicant</div> <div>Kings County</div> <div>Funding Announcement</div> <div>My Application</div> <div>My Applicant Profile</div> <div>Users</div> <div>Active</div> <div>Inactive</div> <div>Contacts</div> <div>Documents</div>	Site Map Options	Description
	My Applicant Profile	View your Applicant Profile. You can add additional documents and relevant information such as a professional CV or other certifications related to the applicant or entity's qualifications.
	Users	View the users related to the application. You can view active or inactive users.
	Contacts	View the contacts related to the application.
	Documents	View documents related to the application.



## Funding Announcement

You can view announcements you have saved/applied to, your applicant profile, users and contacts associated with the Applicant profile or organization profile, and documents related to the funding announcement or an applicant document library that houses documents submitted with an application.

The screenshot shows the GrantVantage Funding Announcement interface. It includes a search bar at the top, a list of announcements, and a detailed view of a specific announcement. The interface is annotated with six yellow callout boxes providing instructions on how to use the features.

**Displays the name of the announcement, the application type, and the application open and close date.**

**Use the search bar to choose an announcement.**

**Choose the view display for the announcement**

**Use the Sort By drop-down list to sort the announcement.**

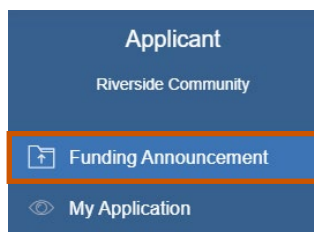
**View the announcement**


**Save the announcement to the My Application page.**

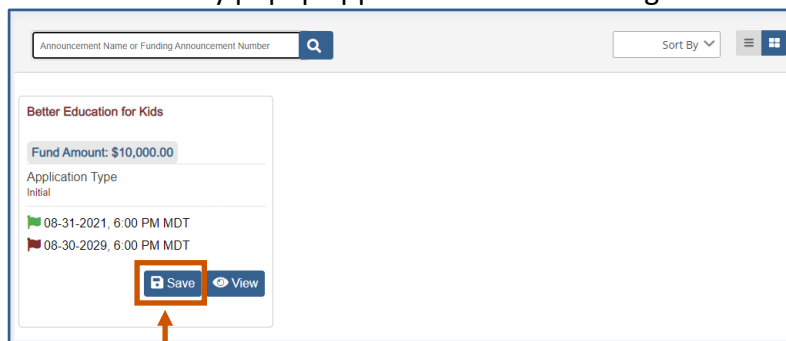
The interface shows a search bar with the placeholder text "Announcement Name or Funding Announcement Number". Below the search bar, there is a list of announcements. The first announcement is "Better Education for Kids" with a fund amount of \$10,000.00. It shows the application type as "Initial" and the open and close dates as "08-31-2021, 6:00 PM MDT" and "08-30-2029, 6:00 PM MDT". At the bottom of the announcement card, there are "Save" and "View" buttons. The "Sort By" dropdown menu is open, showing options: "Funding Announcement", "Funding Amount", "Newly Posted", and "Closing Soon".

## Save an Announcement

1. From the site map, click **Funding Announcement** . The Funding Opportunity for Applicant page appears.



2. **Optional:** Use the search bar to find an announcement.
3. Click **Save**  to save the announcement to the My Application sitemap section. A green Application Saved Successfully popup appears at the bottom right of the screen.

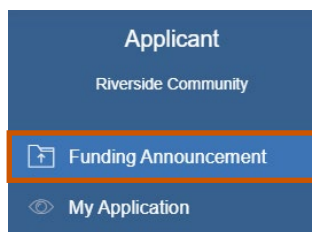



Save the announcement to the My Application page.

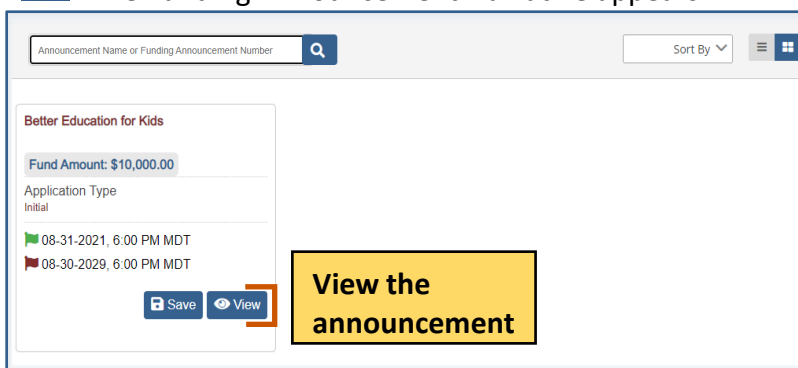
✓ Application Saved Successfully

## View an Announcement

- From the site map, click **Funding Announcement** . The Funding Opportunity for Applicant page appears.







- Optional:** Use the search bar to find an announcement.
- Click **View** . The Funding Announcement Narrative appears.







Use the command bar to view information about the announcement. The command bar changes depending on whether you applied to the announcement.



Announcement Command Bar		Descriptions
Apply		Apply to an announcement.
Close		Close the announcement details.
Print PDF		Print the announcement details as a PDF.

<b>Application Report Budget Report</b> 	View the application report, project summary, and applicant questions/responses. You only see this option if you have applied to the announcement.
--	--


Announcement Command Bar	Descriptions
<b>Budget</b> 	View the budget report and see all the budget categories. You only see this option if you have applied to the announcement.
<b>Objective Report</b> 	View the objective report. See the objectives, performance measures, and grant activities. You only see this option if you have applied to the announcement.
<b>Attachments</b> 	View attachments associated with the application.

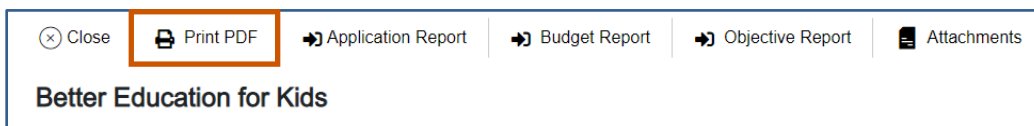
4. Click **Close**  when you are done viewing the announcement details.



## Print the Announcement as a PDF

You only see this option if you have applied to the announcement.

1. Click **Print PDF** . The announcement details download as a PDF.




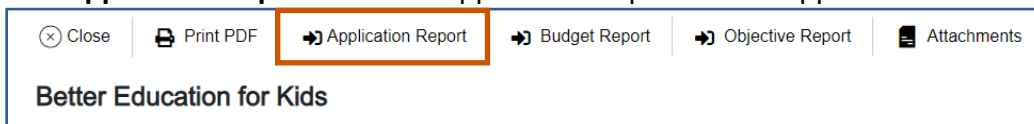
Close Print PDF Application Report Budget Report Objective Report Attachments

Better Education for Kids

## View the Applicant Report


You only see this option if you have applied to the announcement.

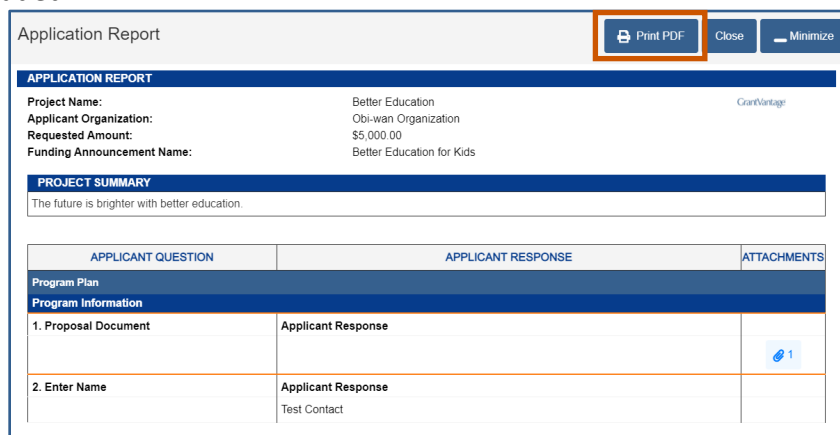
1. Click **Application Report** . The Application Report screen appears.



Close Print PDF Application Report Budget Report Objective Report Attachments

Better Education for Kids

2. **Optional:** Click **Print PDF**  to print the application report as a PDF. The PDF is downloaded.



Application Report


Print PDF Close Minimize

**APPLICATION REPORT**

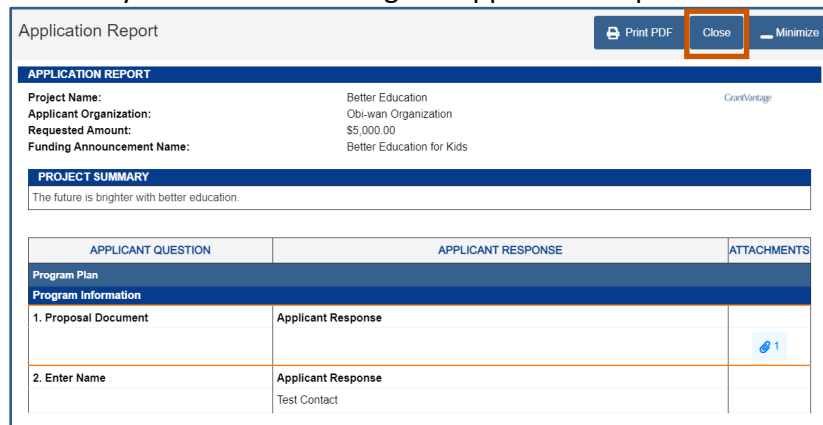
Project Name: Better Education  
Applicant Organization: Obi-wan Organization  
Requested Amount: \$5,000.00  
Funding Announcement Name: Better Education for Kids

**PROJECT SUMMARY**

The future is brighter with better education.

APPLICANT QUESTION	APPLICANT RESPONSE	ATTACHMENTS
<b>Program Plan</b>		
<b>Program Information</b>		
1. Proposal Document	Applicant Response	 1
2. Enter Name	Applicant Response Test Contact	

3. Click **Close** when you are done viewing the application report.



Application Report


Print PDF Close Minimize

**APPLICATION REPORT**


Project Name: Better Education  
Applicant Organization: Obi-wan Organization  
Requested Amount: \$5,000.00  
Funding Announcement Name: Better Education for Kids

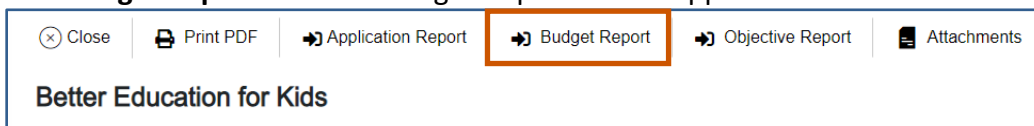
**PROJECT SUMMARY**


The future is brighter with better education.

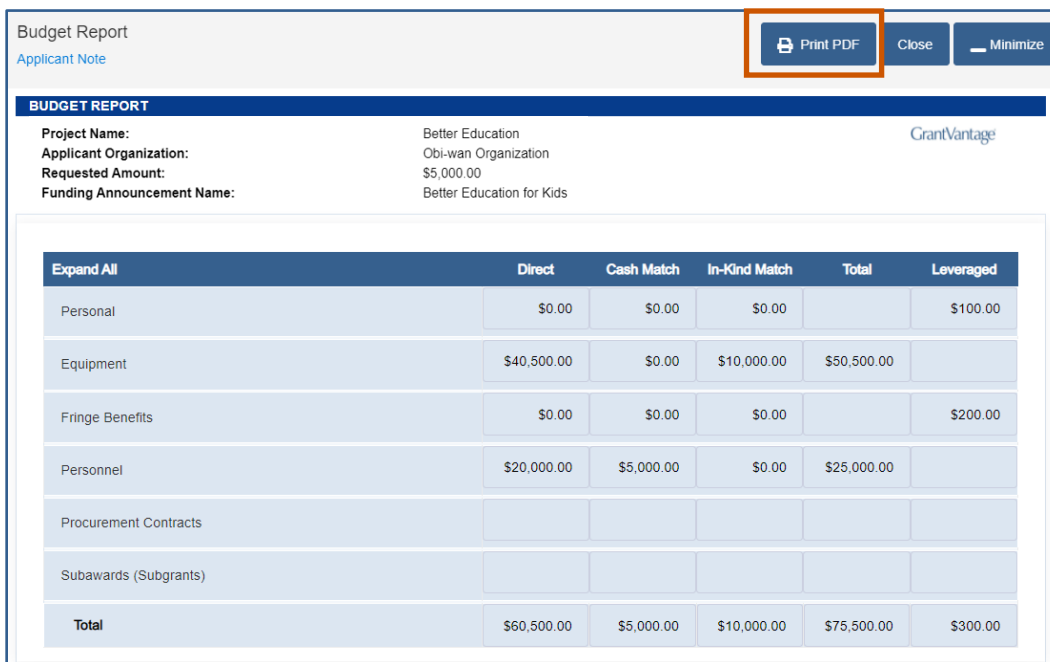
APPLICANT QUESTION	APPLICANT RESPONSE	ATTACHMENTS
<b>Program Plan</b>		
<b>Program Information</b>		
1. Proposal Document	Applicant Response	 1
2. Enter Name	Applicant Response Test Contact	

## View the Budget Report

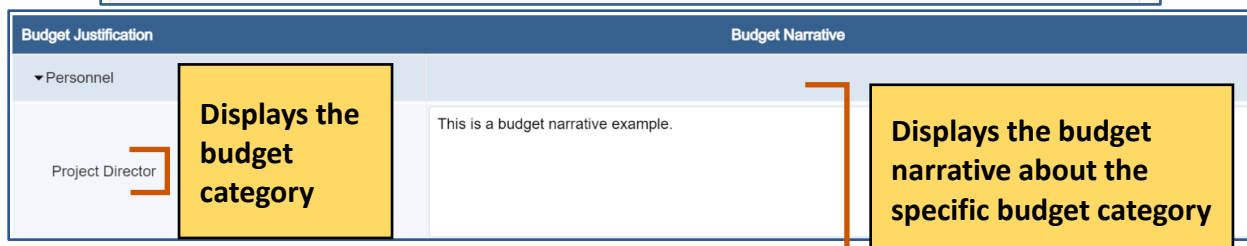
1. Click **Budget Report** . The Budget Report screen appears.



2. **Optional:** Click **Print PDF**  to print the budget report as a PDF. The PDF is downloaded.



Expand All	Direct	Cash Match	In-Kind Match	Total	Leveraged
Personal	\$0.00	\$0.00	\$0.00		\$100.00
Equipment	\$40,500.00	\$0.00	\$10,000.00	\$50,500.00	
Fringe Benefits	\$0.00	\$0.00	\$0.00		\$200.00
Personnel	\$20,000.00	\$5,000.00	\$0.00	\$25,000.00	
Procurement Contracts					
Subawards (Subgrants)					
<b>Total</b>	<b>\$60,500.00</b>	<b>\$5,000.00</b>	<b>\$10,000.00</b>	<b>\$75,500.00</b>	<b>\$300.00</b>



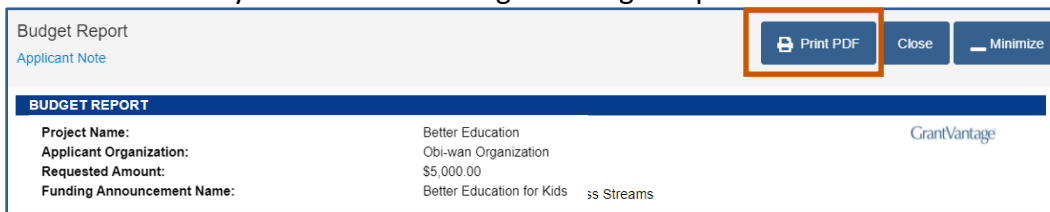
**Budget Justification** **Budget Narrative**

▼ Personnel


Project Director

This is a budget narrative example.

3. Click **Close** when you are done viewing the budget report.




## View the Objective Report

1. Click **Objective Report** . The Objective Report screen appears.

Close
Print PDF
Application Report
Budget Report
**Objective Report**
Attachments

Better Education for Kids

2. **Optional:** Click **Print PDF**  to print the objective report as a PDF. The PDF is downloaded.

Objective Report

Print PDF
Close
Minimize

Applicant Note

**OBJECTIVE REPORT**

Project Name: Better Education  
Applicant Organization: Obi-wan Organization  
Requested Amount: \$5,000.00  
Funding Announcement Name: Better Education for Kids

Object Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date
1	2491	HTS_TST & HTS_POS	HTS_TST & HTS_POS	Test Contact	10/01/2020	10/31/2020

**Performance Measure (4)**

Ref. Id	Performance Measure	Manager	Type	Planned	Actual	Active
1417_1	Describe the sources for the data that you are reporting	Test Contact	Narrative			Not Started
1417_2	If TX_NEW does NOT equal HTS_TST_POS, explain why.	Test Contact	Currency	\$100.00		Not Started
1417_3	Please describe how the denominator was determined. #	Test Contact	Milestone			Not Started
1417_4	If coverage for this indicator is less than 90%, please explain why.	Test Contact	Percentage	50%	10%	Not Started

**Grant Activities (2)**

Ref. Id	Grant Activities	Manager	Start	Due Date	Active
8.1	8.1: Conducting onsite reorientations in index testing and strengthening PITC and use of Screening tool in supported sites	Test Contact	10/01/2020	10/13/2020	Not Started
8.2	8.2: Conduct District Supportive Supervision	Test Contact	10/01/2020	10/14/2020	Not Started

3. Click **Close** when you are done viewing the objective report.

Objective Report

Print PDF
**Close**
Minimize

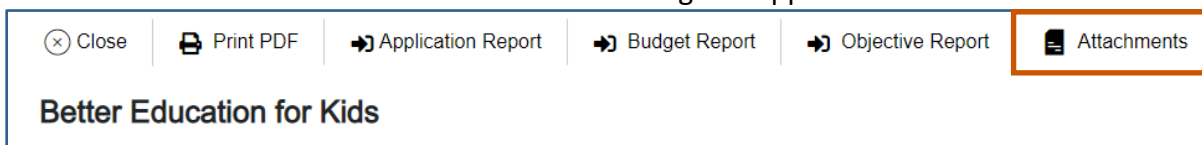
Applicant Note

**OBJECTIVE REPORT**

Project Name: Zebra Zoo Enclosure  
Applicant Organization: Obi-wan Organization  
Funding Announcement Name: Zebras Can Swim Across Streams

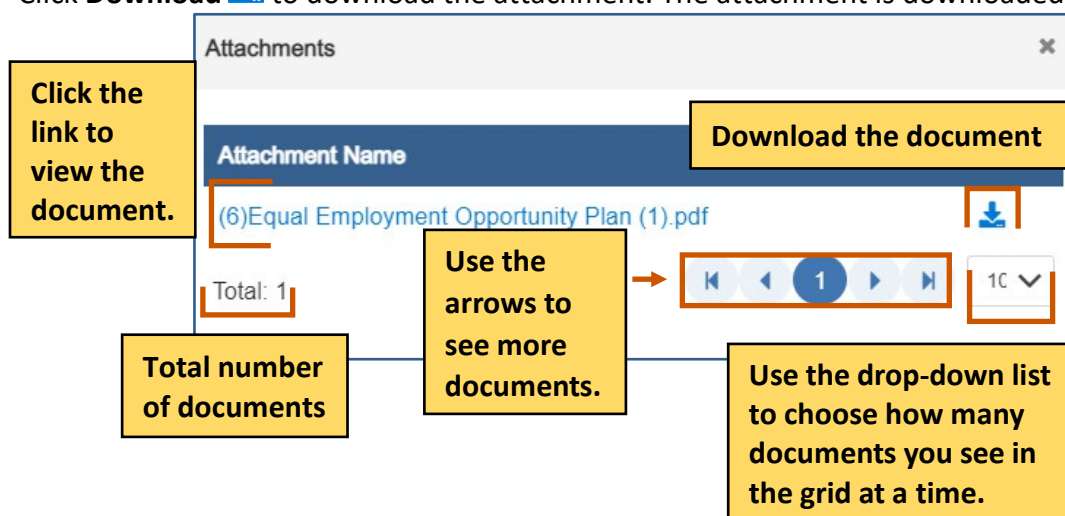
## View Attachments associated with the Announcement

1. Click **Attachments** . The Attachments dialog box appears.




2. Optional: Click the link to view the document.  
Or

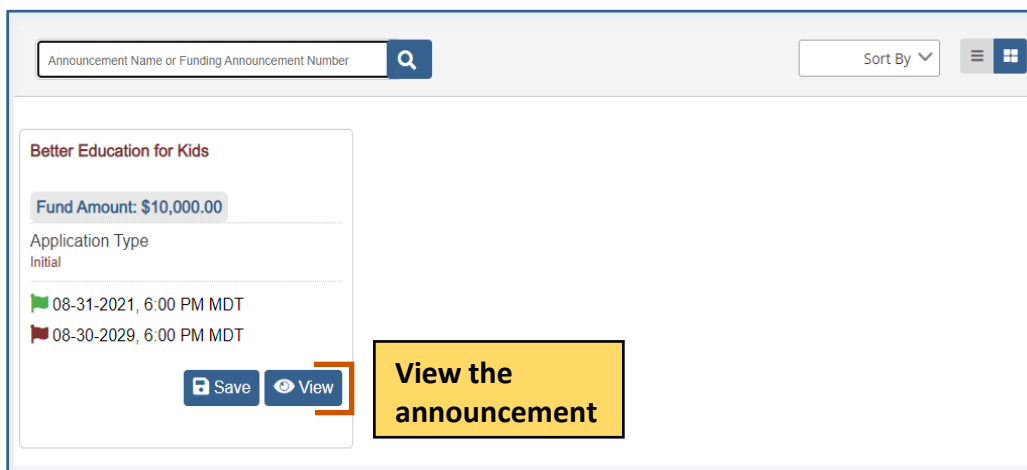
Click **Download**  to download the attachment. The attachment is downloaded.



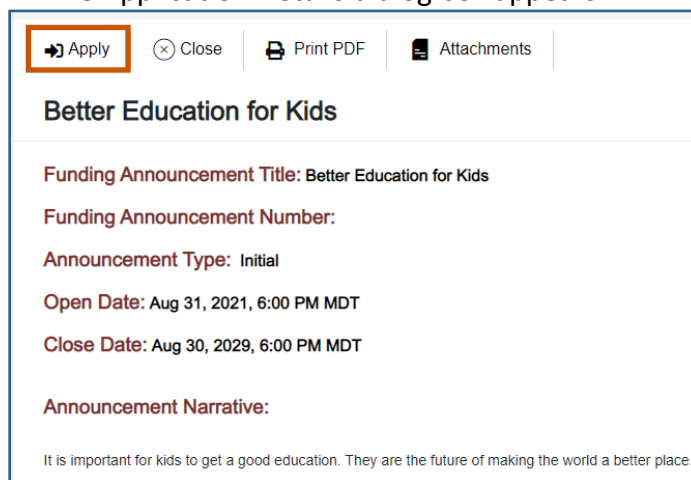


## Submitting Applications to a Funding Announcement

1. Click **View**  next to the announcement you wish to view. The Funding Announcement Narrative appears.
- Note:** Applications do not utilize live updates. Multiple users should not attempt to modify or save the same Question Answer, Objective Template, or Budget Template simultaneously as some data may be lost.



2. Click **Apply** . The Application Details dialog box appears.



3. If you are starting a new application, click **Begin New Application** . The application process begins.

Click to apply with a project.

Total number of projects

Use the arrows to see more projects.

Use the drop-down list to choose how many projects you see in the grid at a time.

Application Details

+ Begin New Application

Project Name	Application ID	Application Status	Last Saved On	Submission Date
Example Project Name	App-21-96	Not Started	09/07/2021	--

Total: 1

4. Enter the **Project Name** for the new application and select **Save**

New Application

Save Close

Project Name\*

Example Project Name

5. Select **Apply** or **Resume** to enter the Application

Application Details

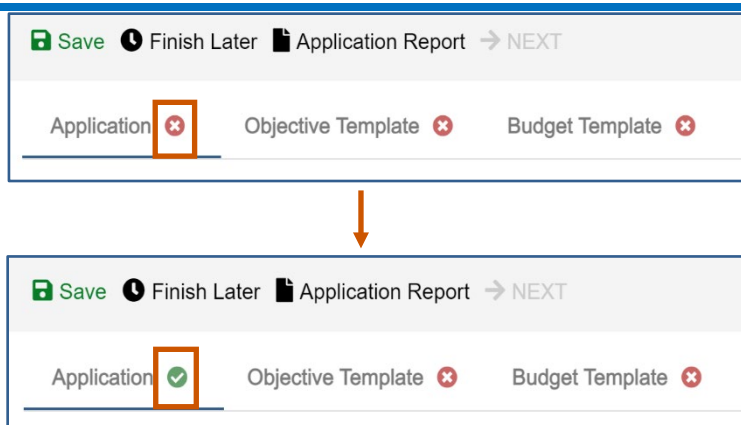
+ Begin New Application

Project Name	Application ID	Application Status	Last Saved On	Submission Date
Example Project Name	App-21-96	In Progress	09/07/2021	--
Lakeside Community Project	App-21-97	Not Started	09/07/2021	--

Total: 2

6. Answer all the questions and complete the templates. Swap between the tabs to complete them in any order.

**Note:** Once you complete a tab item, the red x next to the name turns into a green checkmark.

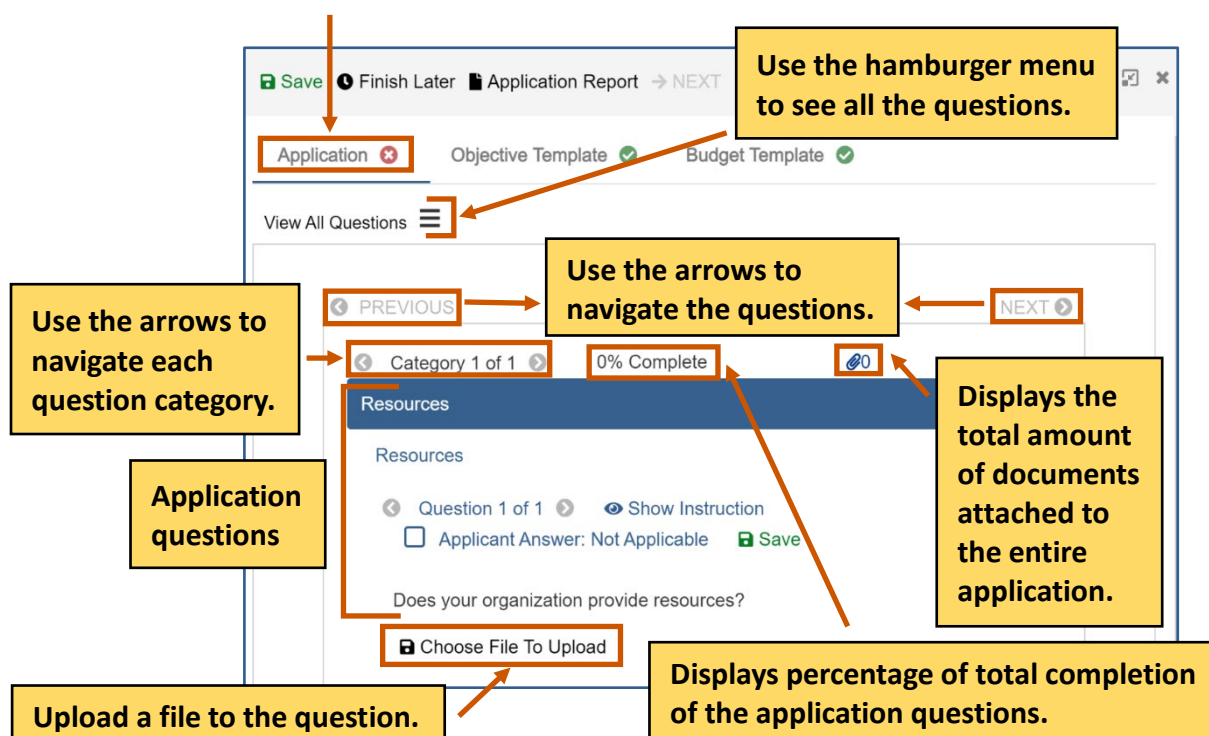


### Application Questions:

- Answer all questions.

**Note:** Applications do not utilize live updates. Multiple users should not attempt to modify or save the same Question Answer, Objective Template, or Budget Template simultaneously as some data may be lost.

Complete the tabs in any order. Once you have completed a tab item, the red x turns into a green checkmark.



- Optional:** If the question requires you to attach a document, attach it to the question.

**Note:** If there is a Not Applicable option, click the radio button to answer the question. You can move onto the next question if necessary.

- Click **Choose File To Upload** . The Documents dialog box appears.

Save Finish Later Application Report → NEXT

Category 1 of 1 0% Complete 0

Resources



Resources

Question 1 of 1 Show Instruction Applicant Answer: Not Applicable

Save

Does your organization provide resources?

Choose File To Upload

- ii. Choose from the picklist.  
Or  
Upload a new document by clicking **Choose File** .
- i. **Upload the document.**
- ii. Click **Save** .
- iii. Click **Save**.

**Use the picklist to choose a document you wish to upload.**

**Use the drop-down list to choose how many documents you see in the grid at a time.**

**Save the new document.**

**Use the arrows to see more documents.**

**Save the document(s)**

**Upload a new document.**

**Total number of documents**

Documents

Document Name	Date Uploaded
<input checked="" type="checkbox"/> Example.docx	05-18-2021
<input checked="" type="checkbox"/> Example 2.docx	

Total: 2

Choose File Save Cancel

1 10

Close Save

Complete the Objective Template:

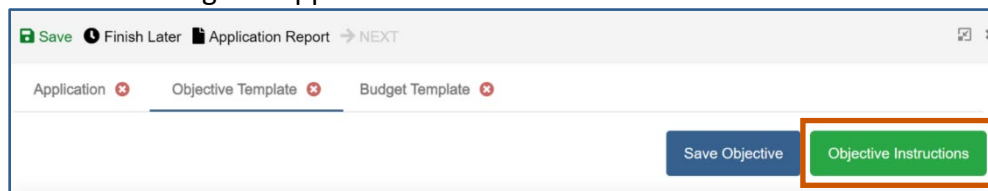
- a. Click the Objective Template tab. The Objectives template appears.


**Note:** Applications do not utilize live updates. Multiple users should not attempt to modify or save the same Question Answer, Objective Template, or Budget Template simultaneously as some data may be lost.

Save Finish Later Application Report → NEXT


Application Objective Template Budget Template

- b. Click Objective Instructions to see how to complete the template. The Objective Instructions dialog box appears.




- c. Click **Maximize**  to maximize the window.


Or

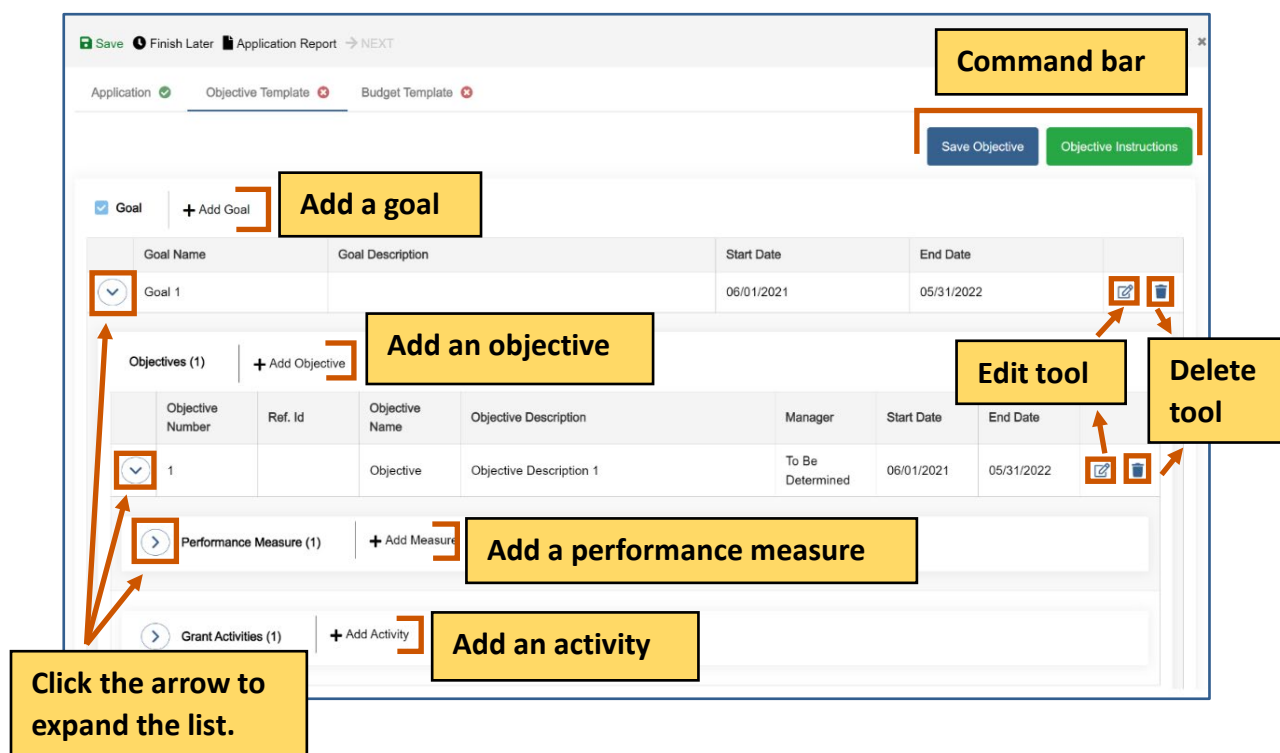
Click **Close**  to close the dialog box.

- d. Add in the goals if necessary. If goals are required, each objective must be associated with a goal.

 **Note:** The Goal radio button only appears if the option has been selected when the announcement was made.

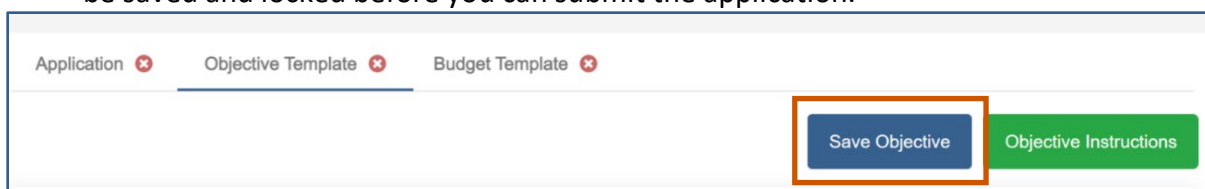
- e. Add in the objectives, performance measures, and grant activities.

 **Note:** The performance measures and grant activities must be associated with an objective. For more information on how to add, edit, or delete a goal, objective, performance measure, or grant activity, see [Objective Tools](#).

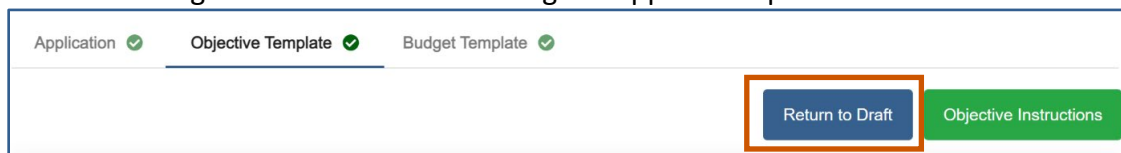


Objective Template Command Bar	Description
Save Objective	Saves the objectives and locks the Objective Template.
Objective Instructions	Display the instructions on how to complete the Objective Template.

- f. Click **Save Objective**. The Objective Template is saved and locked. The objectives must be saved and locked before you can submit the application.



- g. **Optional:** You can unlock the Objective Template again if you need to make change.
- i. Click **Return to Draft**. The Objective Template is locked, and you can edit it. You can go in and out of draft during the application process.

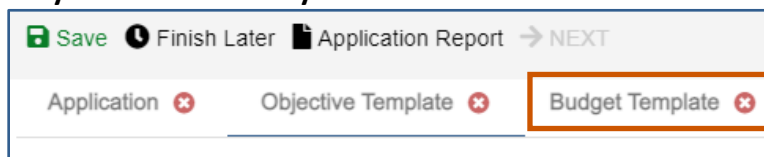


Complete the Budget template.

**i Note:** There are different design setups for the budget. The items you can add/change depend on the properties selected when the announcement was made. For more information, see [Budget Tools](#).

- a. Click the Budget Template tab. The Budget Template appears.

**i Note:** Applications do not utilize live updates. Multiple users should not attempt to modify or save the same Question Answer, Objective Template, or Budget Template simultaneously as some data may be lost.



- b. Use the budget tools to add, edit delete parent categories, sub-categories, or sub-sub-categories. For more information, see Budget Tools.
- c. **Optional:** Single-click the green BN symbol next to a category to show budget calculations and the budget narrative.

**DDS Applicants: Only enter values in the Direct Column**

**View the Budget Instructions for specific guidelines to prepare your budget for submission.**

Project Name\* Farmers Market and Local Foods Prc Year\* Year 1

Save Budget Budget Instructions

Expand All		Direct	Cash Match	In-Kind Match	Total	Leveraged
▼ Personnel		\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
BN Project Director						
BN Personnel - other						
BN Equipment						
BN Travel						
Total					\$ 0.00	\$ 0.00

**Budget tools**

**Type in amount in cells that are white.**

**Single-click the green BN symbol next to a category to show the budget narrative.**

- d. Click **Save Budget**. The Budget template is saved and locked. The budget must be saved and locked before you can submit the application.

Application ✖ Objective Template ✖ Budget Template ✖

Save Budget Budget Instructions

- e. **Optional:** You can unlock the Budget Template again if you need to make change.
- i. Click **Return to Draft**. The Budget Template is locked, and you can edit it. You can go in and out of draft during the application process.

Application ✔ Objective Template ✔ Budget Template ✔


Return to Draft Budget Instructions

Finish the application process

7. Once the questions and the templates are saved and locked, click **Next** ➔. A popup appears confirming you have reviewed your answers.

Save Finish Later Application Report ➔ NEXT


8. Click **Save & Continue**.








Please make sure to review your answers before submitting application. Ensure that all answers and Not Applicable selections are correct.

Review QuestionsSave & Continue

9. Fill in the necessary fields.

 **Note:** The red asterisks indicate required fields.




 Save  Finish Later  Application Report  PREVIOUS  Finish

Provide Project Name \*




Requested Amount

Project Summary \*




Authorized Certifying Official




Project Director/Manager


Project Manager/Coordinator






  



Compliance/Fiscal Officer


  

This field is only grayed-out if it is a budget template. If there is no budget template, the field will be white and allow an entry of a dollar amount.

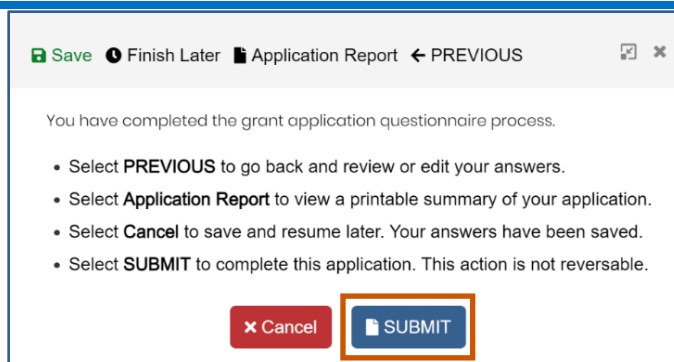
10. Click **Finish** . The Submission page appears telling you how to go back and review your answers, how to view the application report, how to save and resume the application later, and how to submit the application.

 Save  Finish Later  Application Report  PREVIOUS  Finish

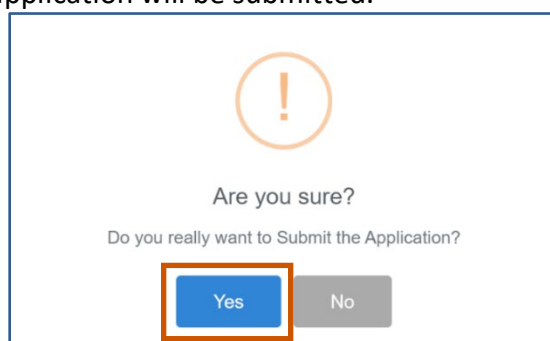
 

11. Click **Submit** . A popup appears asking if you are sure you want to submit the application.

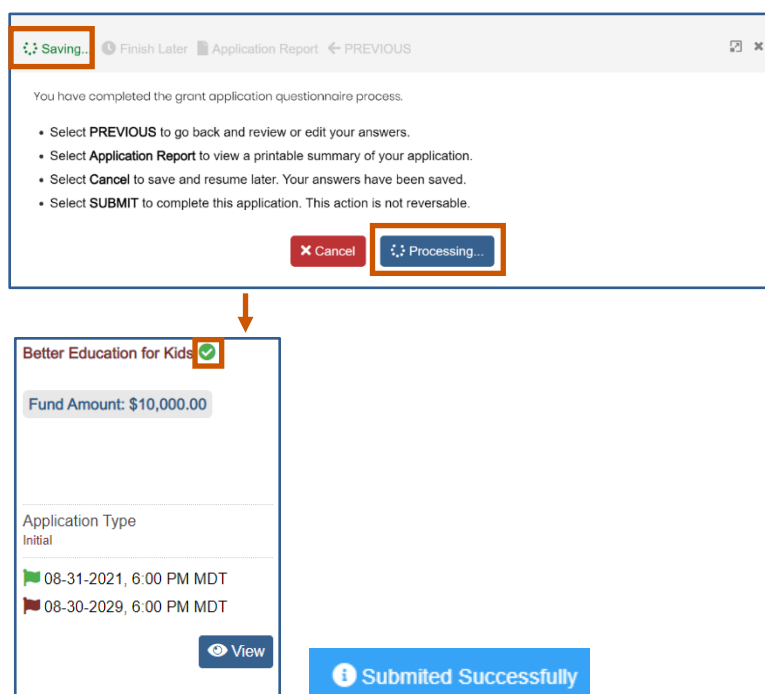




12. Click **Yes**. The application will be submitted.



The Submit button turns into Processing with a spinning wheel. The Save button at the top also has a spinning wheel. Wait until the application has been submitted. There is a green checkmark next to the announcement indicating you have applied. A blue information popup also appears indicating that the application was submitted successfully.



## My Application

You can view applications you have saved.

The screenshot shows the GrantVantage application interface. A search bar at the top is labeled "Announcement Name or Funding Announcement Number". Below it, a card for "Better Education for Kids" displays a fund amount of \$10,000.00, application type "Initial", and two dates: "08-31-2021, 6:00 PM MDT" and "08-30-2029, 6:00 PM MDT". At the bottom of the card are "Save" and "View" buttons. To the right, a "Sort By" dropdown menu is open, showing options: "Funding Announcement", "Funding Amount", "Newly Posted", and "Closing Soon".

**Displays the name of the announcement, the application type, and the application open and close date.**

**Use the search bar to choose an announcement.**

**Choose the view display for the announcement**

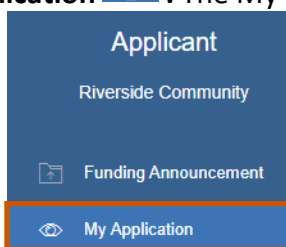
**Use the Sort By drop-down list to sort the announcement.**

**View the announcement**

**Save the announcement to the My Application page.**

## Remove an Application from Saved

1. From the site map, click **My Application** . The My Application page appears.



2. Click **Removed From Saved** . The announcement is removed from the screen, and a green Application Removed Successfully popup appears at the bottom right of the screen.

The screenshot shows the same application card as before, but with a "Remove From Saved" button (trash icon) at the bottom. A green popup message at the bottom right reads "Application Removed Successfully".

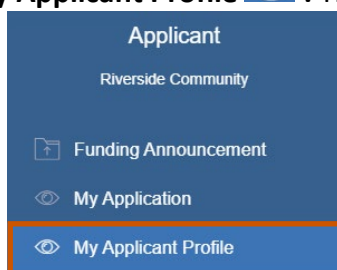
**Remove the announcement to the My Application page.**


## My Applicant Profile

Once an applicant has created a user account, they may navigate to their Applicant Profile. The Applicant Profile and related pages are a fully customizable tool to enhance the user's applications. *My Applicant Profile* is a tool designed to enhance a user's application. Here, applicants may add additional documents and relevant information such as a professional CV or other certifications related to the applicant or entity's qualifications. All applicant users must upload their documents to their User Profile before they begin a funding announcement application. Applicant's will not be able to upload documents directly to the application. Instead, the system will look to the user's profile.

The screenshot shows the 'My Applicant Profile' page for 'Obi-wan Organization'. The page has a light blue header with the title. Below the header is a navigation bar with tabs: 'Organization Information' (selected), 'Address', 'Users', and 'Contact'. The main form area contains several input fields: 'Organization Name' (with a red asterisk) containing 'Obi-wan Organization', 'EIN' (empty), 'Organization Type' (dropdown menu showing 'Nonprofit'), 'DUNS Number' (empty), 'Website URL' (empty), 'Main Phone' (empty), and 'Fax Number' (empty). A 'Save' button is located at the bottom right of the form.

1. From the site map, click **My Applicant Profile** . The Applicant Profile page appears.



2. On the Organization Information tab, fill in the necessary fields.  
 **Note:** The red asterisks indicate required fields. The Address, Users, Contact, Documents, and Award Status tabs appear only after you save the organization information. Make sure to save each tab information as you go.

My Applicant Profile : Obi-wan Organization

< Organization Information Address Users Contact >

Organization Name \* EIN

Obi-wan Organization

Organization Type DUNS Number

Nonprofit

Website URL Main Phone

Fax Number

Save

3. **Optional:** On the Address tab, fill in the necessary fields.

My Applicant Profile : Obi-wan Organization

< Organization Information Address Users Contact Documents >

Mailing Address

Address Line 1 Address Line 2 City

County State/Province/Region Country

Postal Code

Physical Address ☐ Same as Mailing Address

Address Line 1 Address Line 2 City

County State/Province/Region Country

Postal Code

Save

4. **Optional:** On the Users tab, add a user. The user you registered with is automatically a user.
- a. Click **New** +. The Create New User dialog box appears.

The screenshot shows the 'My Applicant Profile : Obi-wan Organization' page. The 'Users' tab is selected. A yellow box labeled 'Add a user' points to the '+ New' button. Another yellow box labeled 'Click the link to view the user.' points to the 'Test Contact' link in the user list. A third yellow box labeled 'Total number of users' points to the 'Total: 1' text. A fourth yellow box labeled 'Use the arrows to see more users.' points to the pagination arrows. A fifth yellow box labeled 'Use the drop-down list to choose how many users you see in the grid at a time.' points to the '10' drop-down menu. A sixth yellow box labeled 'Save the user' points to the 'Save' button at the bottom right.


- b. On the User information tab, fill in the necessary fields.

**Note:** The red asterisks indicate required fields.

The 'Create New User' form is shown with the 'User Information' tab selected. The form contains the following fields:

- First Name \*** (required)
- Last Name \*** (required)
- Job Title**
- Email Address \*** (required)
- Phone Number**
- User Name \*** (required)
- Password \*** (required)
- Password (repeat) \*** (required)

A red asterisk indicates that the 'User Name' field is required. A red message below the password fields states: 'Passwords do not match!'.

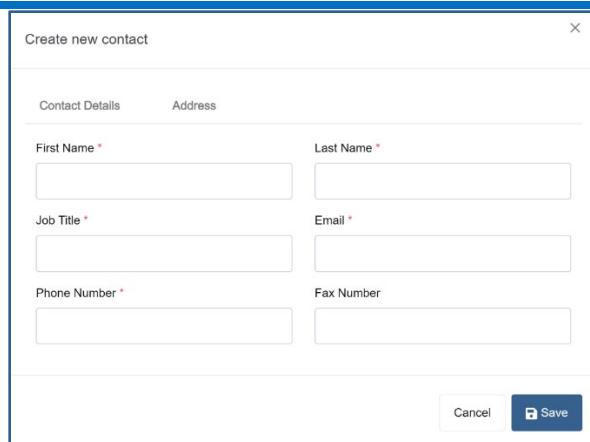
- c. **Optional:** On the Address information tab, fill in the necessary fields.
- d. Click **Save**  to save the user. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 4a-4d for each user.

The 'Create New User' dialog box has two tabs: 'User Information' and 'Address'. The 'Address' tab is active, showing fields for Address Line 1, Address Line 2, City, County, State/Province/Region, Country (a dropdown menu with '--Select Country--'), and Postal Code. At the bottom right, there is a 'Cancel' button and a 'Save' button. A yellow callout box labeled 'Save the user' points to the 'Save' button. Below the dialog box, a blue status bar displays 'Saved Successfully.'


5. **Optional:** On the Contact tab, add a contact. The user you registered with is automatically a contact.
- Click **New** . The Create New Contact dialog box appears.

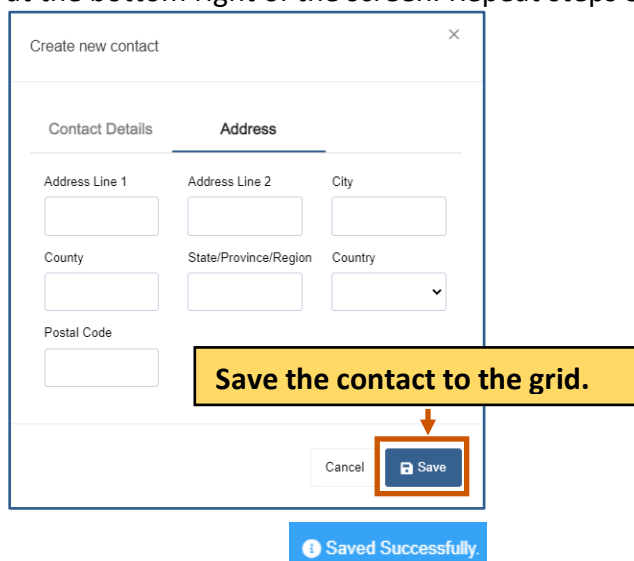
The 'My Applicant Profile : Obi-wan Organization' interface shows tabs for Organization Information, Address, Users, Contact, Documents, and Award Status. The 'Contact' tab is active, displaying a table with columns: Full Name, Organization Name, Job Title, Phone Number, and Email. A '+ New' button is located at the top left of the table. A yellow callout box labeled 'Click the link to view the contact.' points to the '+ New' button. Another yellow callout box labeled 'Add a contact' points to the same button. Below the table, a 'Total: 1' label is shown. A yellow callout box labeled 'Total number of contacts' points to this label. The table contains one contact: 'Test Contact' from 'Obi-wan Organization', with job title 'Project Manager', phone number '13037896789', and email 'tcontact@applicant.com'. A yellow callout box labeled 'Use the arrows to see more contacts.' points to the pagination controls at the bottom of the table, which include arrows and the number '1'. A yellow callout box labeled 'Use the drop-down list to choose how many contacts you see in the grid at a time.' points to the dropdown menu showing '10'. At the bottom right, there is a 'Save' button. A yellow callout box labeled 'Save the contact' points to this button.

- On the Contact Details, fill in the necessary fields.
- Note:** The red asterisks indicate required fields.



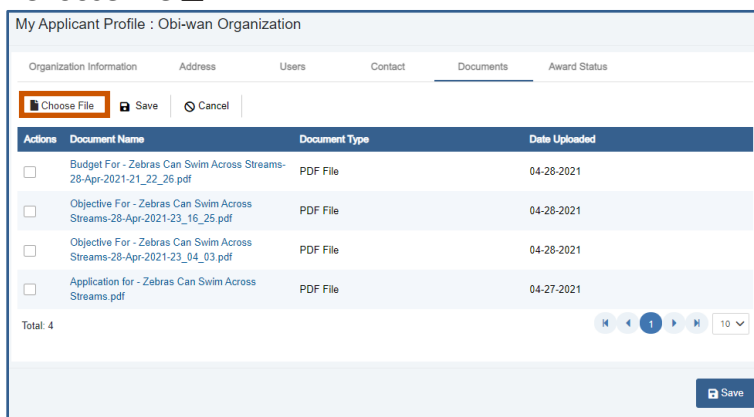
The 'Create new contact' form has two tabs: 'Contact Details' and 'Address'. The 'Contact Details' tab is active, showing fields for First Name, Last Name, Job Title, Email, Phone Number, and Fax Number. Each field has a red asterisk indicating it is required. At the bottom right are 'Cancel' and 'Save' buttons.

- c. **Optional:** On the Address Details, fill in the necessary fields.
- d. Click **Save**  to save the contact to the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 8a-8d for each contact.



The 'Create new contact' form is shown with the 'Address' tab active. Fields include Address Line 1, Address Line 2, City, County, State/Province/Region, Country (dropdown), and Postal Code. A yellow callout box with the text 'Save the contact to the grid.' has an arrow pointing to the 'Save' button, which is highlighted with a red box. Below the form, a blue 'Saved Successfully.' message is displayed.

6. **Optional:** On the Document tab, add a document.
- a. Click **Choose File** .




The 'My Applicant Profile' page for 'Obi-wan Organization' shows the 'Documents' tab. It includes a toolbar with 'Choose File', 'Save', and 'Cancel' buttons. Below is a table of documents:

Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/>	Budget For - Zebras Can Swim Across Streams-28-Apr-2021-21_22_26.pdf	PDF File	04-28-2021
<input type="checkbox"/>	Objective For - Zebras Can Swim Across Streams-28-Apr-2021-23_16_25.pdf	PDF File	04-28-2021
<input type="checkbox"/>	Objective For - Zebras Can Swim Across Streams-28-Apr-2021-23_04_03.pdf	PDF File	04-28-2021
<input type="checkbox"/>	Application for - Zebras Can Swim Across Streams.pdf	PDF File	04-27-2021




Total: 4

At the bottom right is a 'Save' button.

- b. Upload the file. The name of the file replaces the Choose File button.
- c. Click **Save**  to save the document to the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 6a-6c for document.






My Applicant Profile : Obi-wan Organization


Organization Information Address Users Contact Documents Award Status


 Example.docx  Save  Cancel

Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/>	Budget For - Zebras Can Swim Across Streams-28-Apr-2021-21_22_26.pdf	PDF File	04-28-2021
<input type="checkbox"/>	Objective For - Zebras Can Swim Across Streams-28-Apr-2021-23_16_25.pdf	PDF File	04-28-2021
<input type="checkbox"/>	Objective For - Zebras Can Swim Across Streams-28-Apr-2021-23_04_03.pdf	PDF File	04-28-2021
<input type="checkbox"/>	Application for - Zebras Can Swim Across Streams.pdf	PDF File	04-27-2021

Total: 4

     10

 Save

 Saved Successfully.

## 7. Optional: Check the status of an award.

- a. Click the Award Status tab.

My Applicant Profile : Obi-wan Organization






Organization Information Address Users Contact Documents Award Status


Announcement

No Filter (0) Search...

Announcement	Project Name	Submitted Date	Amount Requested	Status
Better Education for Kids	Riverside Community	09/03/2021	\$10,000.00	AWARD

Total: 0

     10

 Save

**Choose an announcement from the grid.**

**Total number of announcements**

**Use the arrows to see more announcements.**

**Use the drop-down list to choose how many announcements you see in the grid at a time.**

- b. Use the Announcement drop-down list to choose an announcement.  
Or  
Use the search bar to find an announcement.



My Applicant Profile : Obi-wan Organization

Use the Announcement drop-down list to choose an announcement.

Use the search bar to find an announcement.

Announcement


No Filter (0)

Search...

Announcement	Project Name	Submitted Date	Amount Requested	Status
Better Education for Kids	Riverside Community	09/03/2021	\$10,000.00	AWARD

Total: 0

Save

8. Click **Save**  to save the applicant profile and close the dialog box. A blue Saved Successfully popup appears at the bottom right of the screen.

My Applicant Profile : Obi-wan Organization

Organization Information Address Users Contact Documents Award Status

Announcement

No Filter (0)


Search...

Announcement	Project Name	Submitted Date	Amount Requested	Status
Better Education for Kids	Riverside Community	09/03/2021	\$10,000.00	AWARD

Total: 0

Save the applicant profile.

Save

 Saved Successfully.

## Users

View the users related to the application. You can view active or inactive user.

**Create a user**

**Use the search bar to search users.**

**Choose a user from the grid.**

**Total number of users**

**Use the arrows to see more users.**

**Use the drop-down list to choose how many users you see in the grid at a time.**

	Name	Email	Organization Unit	Active
<input type="checkbox"/>	Test Contact	tcontact@applicant.com	Riverside Community	✓
<input type="checkbox"/>	Mickey Mouse	mmouse@applicant.com	Riverside Community	✓

Total: 2

## Active Users

You can view active users.

**Add a user**

**Use the search bar to choose a user.**




**Total amount of users**

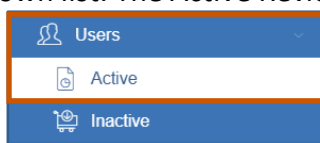
**Use the arrows to navigate users.**

**Choose how many users are displayed in the grid at a time.**

	Name	Email	Organization Unit	Active
<input type="checkbox"/>	Test Contact	tcontact@applicant.com	Obi-wan Organization	✓




Total: 1

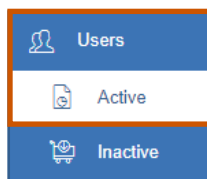
- From the site map, click **Review Management**  and click **Review Panel** . Choose **Active**  from the drop-down list. The Active Reviewers screen appears.




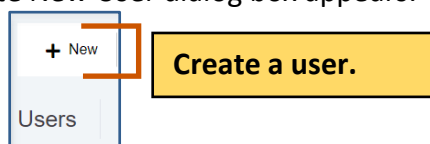
## Create a User

You complete this action from both the Active Users and Inactive Users options from the sitemap.



1. From the site map, click **Users**  and choose **Active**  or **Inactive** . The Users for Applicant page appears.




2. Click **New** . The Create New User dialog box appears.

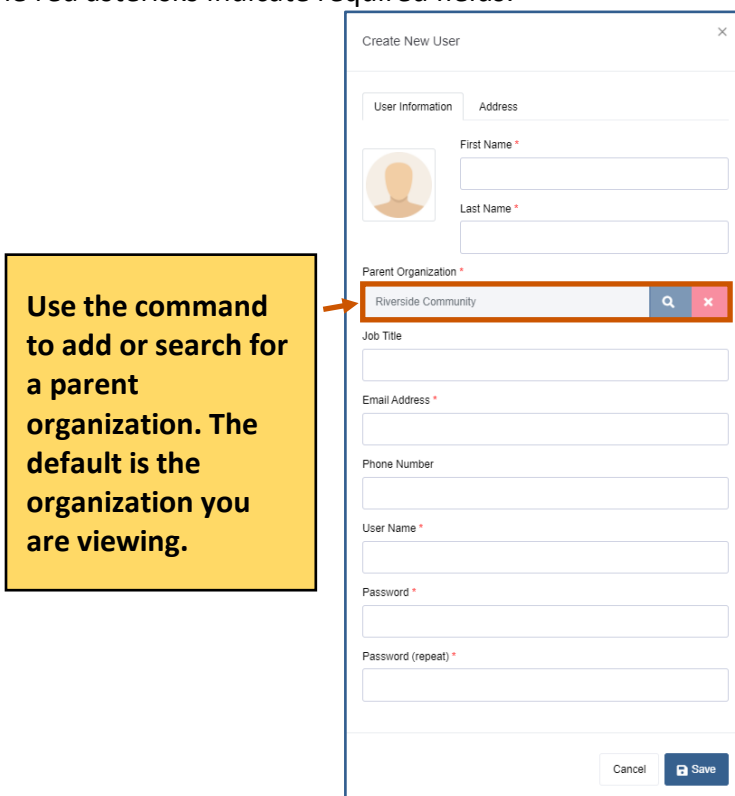


Under the Active column:

-  indicates the user is inactive.
-  indicates the user is active.

3. On the User information tab, fill in the necessary fields.


 **Note:** The red asterisks indicate required fields.

A screenshot of the 'Create New User' dialog box. It has two tabs: 'User Information' and 'Address'. The 'User Information' tab is active. It contains several input fields: 'First Name \*', 'Last Name \*', 'Parent Organization \*' (with a dropdown menu showing 'Riverside Community'), 'Job Title', 'Email Address \*', 'Phone Number', 'User Name \*', 'Password \*', and 'Password (repeat) \*'. Red asterisks indicate required fields. A yellow callout box with an orange arrow points to the 'Parent Organization' dropdown. The callout text reads: 'Use the command to add or search for a parent organization. The default is the organization you are viewing.' At the bottom right are 'Cancel' and 'Save' buttons.

4. On the Address tab, fill in the necessary fields.





**Note:** The red asterisks indicate required fields.

- Click **Save**  to save the user. They appear in the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 2-4 for each user.

 **Saved Successfully.**

## Edit a User

- Optional:** Use the search bar to find a user.
- Double-click** the user to edit it. The Edit User dialog box appears.

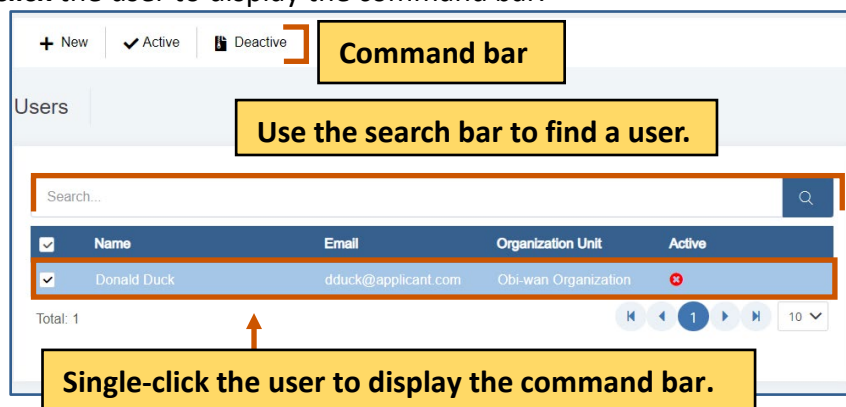
- Edit the necessary fields for each tab.  
 **Note:** The red asterisks indicate required fields.
- Click **Save** . The changes are saved. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 1-5 for each council review you wish to edit.

 **Saved Successfully.**

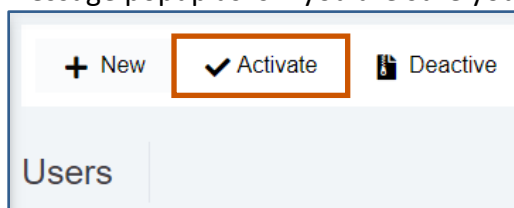
## Activate a User

You complete this action from both the Active Users and Inactive Users options from the sitemap.

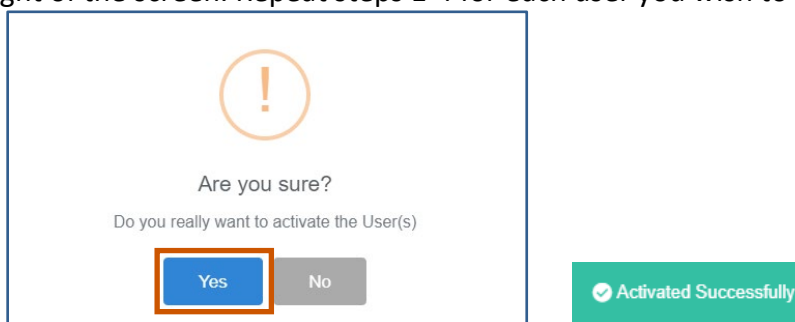
1. **Optional:** Use the search bar to find a user.
2. **Single-click** the user to display the command bar.



3. Click **Activate** ✓. A message popup asks if you are sure you want to activate the user.



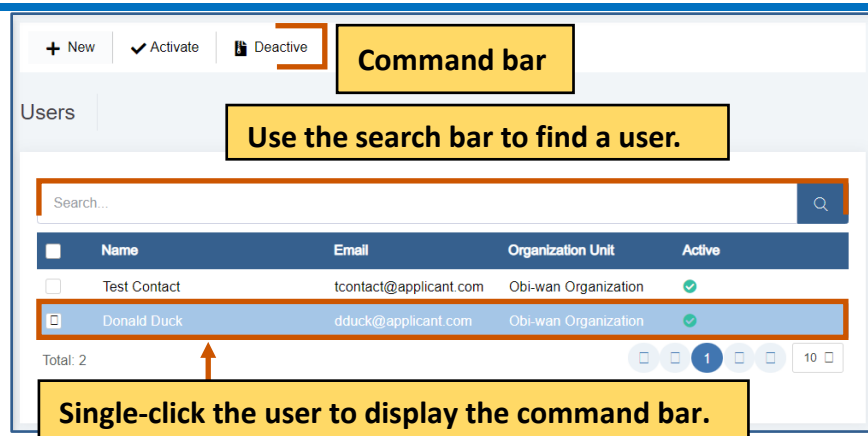
4. Click **Yes**. The user is deactivated. A green Activated Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each user you wish to deactivate.




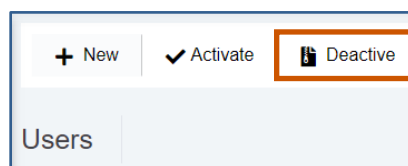
## Deactivate a User

You complete this action from both the Active Users and Inactive Users options from the sitemap.

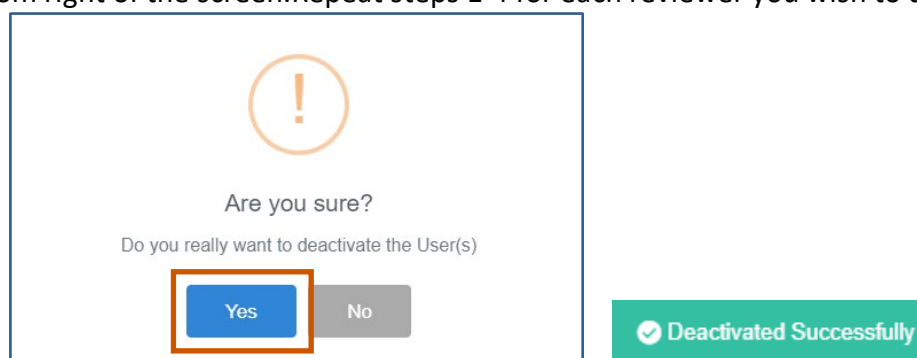
1. **Optional:** Use the search bar to find a user.
2. **Single-Click** the user to display the command bar.



3. Click **Deactivate** . A message popup asks if you are sure you want to deactivate the user.



4. Click **Yes**. The reviewer is deactivated. A green Activated Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each reviewer you wish to deactivate.






## Inactive Users

You can view inactive review panels.

The screenshot shows the 'Users' management page. At the top left, there is a '+ New' link and an 'Add a user' button. Below this is a 'Users' tab. A search bar is located above a table of users. The table has columns for 'Name', 'Email', 'Organization Unit', and 'Active'. One user, 'Donald Duck', is listed with email 'dduck@applicant.com' and organization 'Obi-wan Organization'. The 'Active' column shows a red 'X' icon. Below the table, there is a 'Total: 1' label. To the right of the table, there are pagination controls with arrows and a page number '1', and a dropdown menu showing '10'.

**Callouts:**

- Add a user**: Points to the '+ New' link and 'Add a user' button.
- Use the search bar to choose a user.**: Points to the search bar.
- Use the arrows to search through the users.**: Points to the pagination arrows.
- Choose how many users are displayed in the grid at a time.**: Points to the dropdown menu showing '10'.
- Total amount of users**: Points to the 'Total: 1' label.

1. From the site map, click **Review Management**  and click **Inactive** . Choose **Inactive**  panels from the drop-down list. The Inactive Reviewers screen appears.



## Contacts

View the contacts related to the application.

The screenshot shows the 'Contacts' page in GrantVantage. At the top left, there is a '+ New' button. Below it, a 'Contacts' tab is selected. A table lists two contacts: 'Test Contact' and 'Donald Duck', both from 'Obi-wan Organization'. The table has columns for 'Full Name', 'Organization Name', 'Job Title', 'Phone Number', and 'Email'. Below the table, it says 'Total: 2'. To the right of the table is a pagination control with arrows and a dropdown menu set to '10'.

**Create a contact.**

**Choose a contact from the grid.**

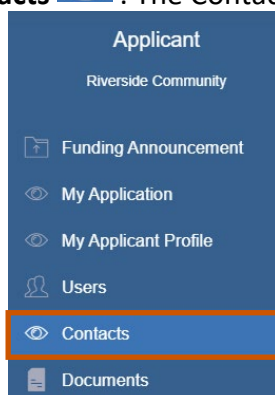
**Total number of contacts**

**Use the arrows to see more contacts.**

**Use the drop-down list to choose how many contacts you see in the grid at a time.**

## Add a Contact

1. From the site map, click **Contacts** . The Contacts for Applicant page appears.



2. Click **New** . The Create New Contact dialog box appears.



**Create a contact.**

**Choose a contact from the grid.**

**Total number of contacts**

**Use the arrows to see more contacts.**

**Use the drop-down list to choose how many contacts you see in the grid**

<input checked="" type="checkbox"/>	Full Name	Organization Name	Job Title	Phone Number	Email
<input type="checkbox"/>	Test Contact	Obi-wan Organization	Project Manager	13037896789	tcontact@applicant.com
<input type="checkbox"/>	Donald Duck	Obi-wan Organization	Project Director	3031231234	dduck@applicant.com

Total: 2

3. On the Contact Details tab, fill in the necessary fields.

**Note:** The red asterisks indicate required fields.

Create new contact

Contact Details

Address

First Name \*

Last Name \*

Job Title \*

Email \*

Phone Number \*


Fax Number

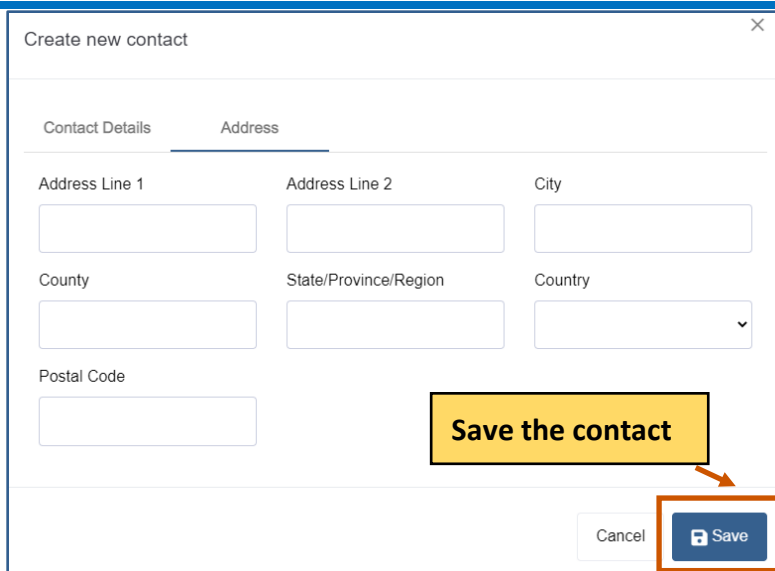
Cancel

Save

4. **Optional:** On the address tab, fill in the necessary fields.

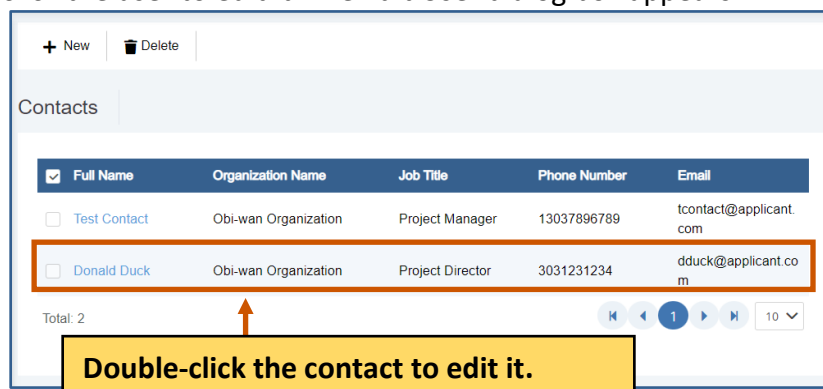
**Note:** The red asterisks indicate required fields.

5. Click **Save**  to save the contact. They appear in the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 2-4 for each contact.




## Edit a Contact

1. **Double-click** the user to edit it. The Edit User dialog box appears.



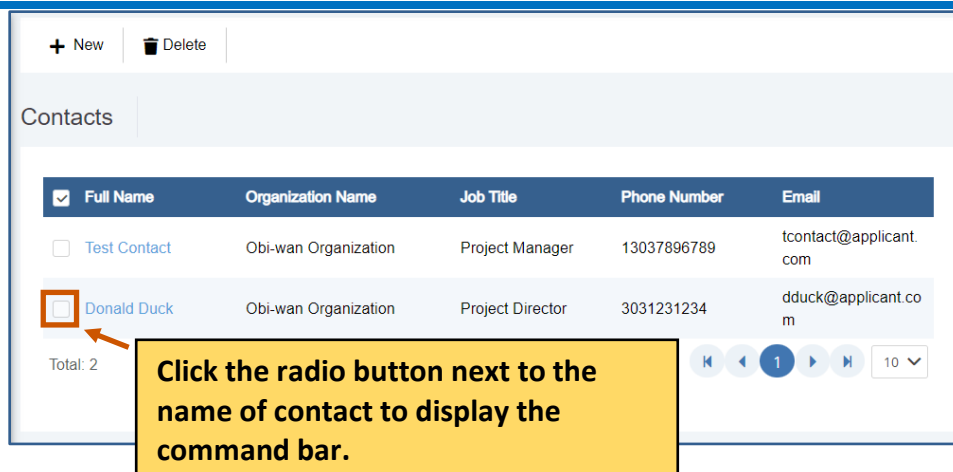
<input checked="" type="checkbox"/> Full Name	Organization Name	Job Title	Phone Number	Email
<input type="checkbox"/> Test Contact	Obi-wan Organization	Project Manager	13037896789	tcontact@applicant.com
<input type="checkbox"/> Donald Duck	Obi-wan Organization	Project Director	3031231234	dduck@applicant.com

2. Edit the necessary fields for each tab.
3. Click **Save** . The changes are saved. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 1-5 for each council review you wish to edit.

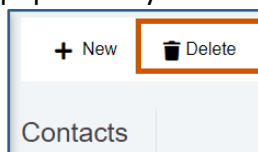
 Saved Successfully.

## Delete a Contact

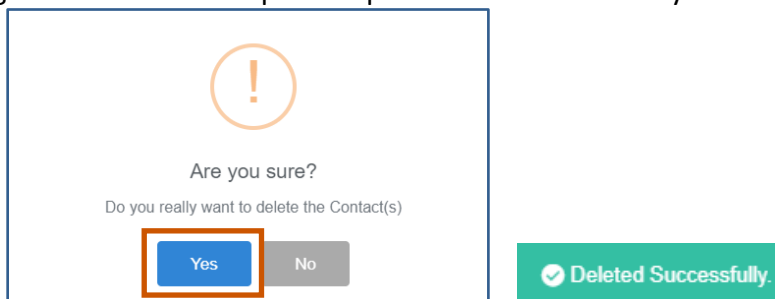
1. Click the radio button next to the name of contact to display the command bar.



2. Click **Delete** . A message popup asks if you are sure you want to delete the contact.



3. Click **Yes**. The contact is deleted. A green Deleted Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each contact you wish to delete.






## Documents

View documents related to the application.


The screenshot shows the 'Documents' interface with the following callouts:

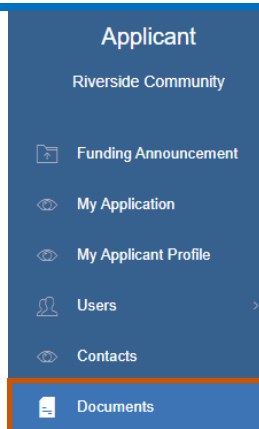
- Command bar:** Points to the top bar containing 'Choose File', 'Save', and 'Cancel' buttons.
- Choose a contact from the grid:** Points to the 'Actions' column in the document table.
- Total number of documents:** Points to the 'Total: 2' indicator at the bottom left of the table.
- Use the arrows to see more documents:** Points to the pagination navigation arrows.
- Use the drop-down list to choose how many users you see in the grid at a time:** Points to the page number '1' and the items per page dropdown menu showing '10'.



Actions	Document Name	Document Type	Date Updated
<input type="checkbox"/>	Application for - Better Education for Neighborhood Kids.pdf	PDF File	06-18-2021
<input type="checkbox"/>	Example.docx		06-03-2021

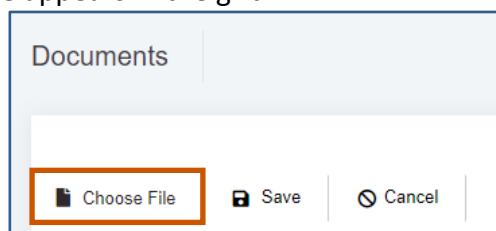
Command Options		Description
Choose File		Choose the file you want to upload.
Save		Save the file you want to upload
Cancel		If you choose a file you do not want to upload, you can cancel uploading the file.

## Add a Document

1. From the site map, click **Documents** . The Attach Document for Applicant page appears.

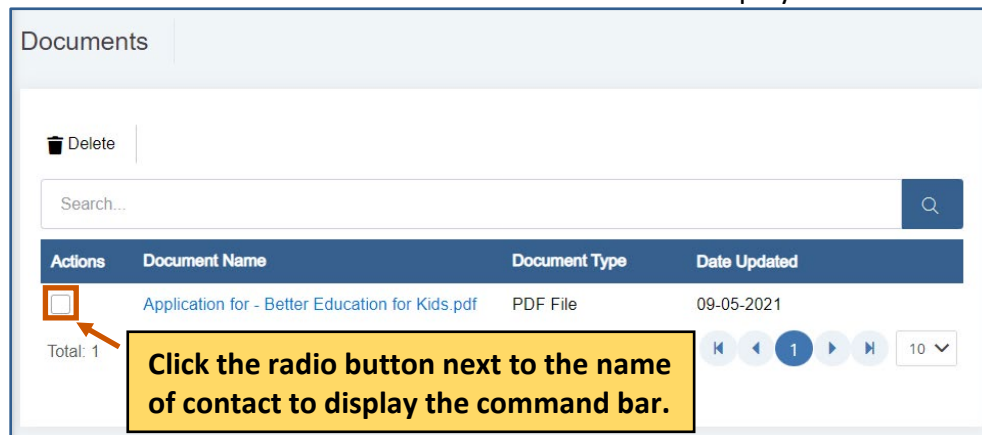



2. Click **Choose File** .
3. Upload the file.
4. Click **Save** . The file appears in the grid.

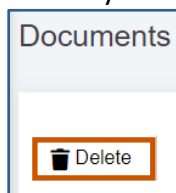


## Delete a Document

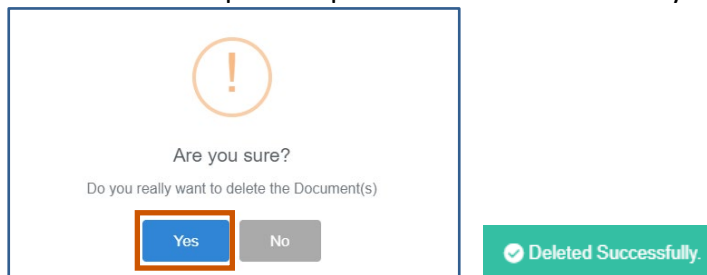
1. Click the radio button next to the name of document to display the command bar.



2. Click **Delete** . A message popup asks if you are sure you want to delete the document.



3. Click **Yes**. The document is deleted. A green Deleted Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each document you wish to delete.



## Budget Tools

The items you can add/change depend on the properties selected when the announcement was made.

You can add, edit, or delete parts of the Budget Template. Enter the amounts of money in the cells that are white. Cells that are light blue are not editable. You can also add sub-categories and sub-sub-categories, edit sub-categories and sub-sub-categories, and/or delete sub-categories and sub-sub-categories. Single-click the green BN symbol next to a category to show budget calculations and the budget narrative.

**Note:** Applications do not utilize live updates. Multiple users should not attempt to modify or save the same Question Answer, Objective Template, or Budget Template simultaneously as some data may be lost.

View the Budget Instructions for specific guidelines to prepare your budget for submission.

Project Name\* Farmers Market and Local Foods Prc Year\* Year 1

Save Budget Budget Instructions

Expand All	Direct	Cash Match	In-Kind Match	Total	Leveraged
▼ Personnel	\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
BN Project Director					
BN Personnel - other					
BN Equipment					
BN Travel					
Total			\$ 0.00	\$ 0.00	\$ 0.00

Budget tools

Type in amount in cells that are white.

Single-click the green BN symbol next to a category to show budget calculations and the budget narrative.

Budget Justification	Budget Narrative
▼ Personnel	
Project Director	This is a budget narrative example.

Displays the budget category

Displays the budget narrative about the specific budget category

# Adding Budget Values

Single-click the budget category data field and enter the line item value.

View the Budget Instructions for specific guidelines to prepare your budget for submission.

Project Name\* Farmers Market and Local Foods Prc

Year\* Year 1

Save Budget

Budget Instructions

Expand All		Direct	Cash Match	In-Kind Match	Total	Leveraged
▼ Personnel		\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
BN Project Director						
BN Personnel - other						
BN Equipment	+					
BN Travel						
Total				\$ 0.00	\$ 0.00	\$ 0.00

Budget tools


Type in amount in cells that are white.

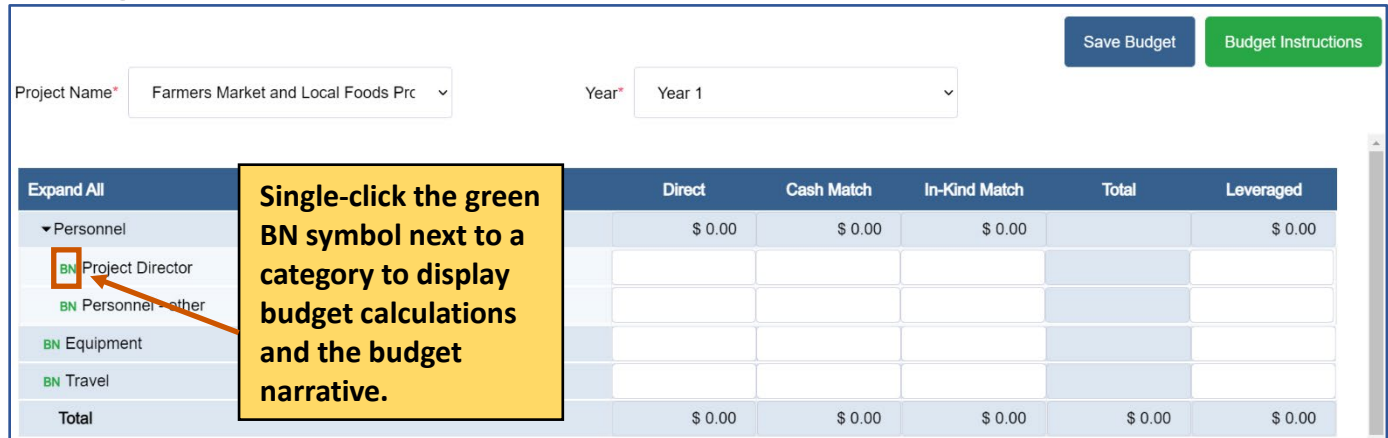
Single-click the green BN symbol next to a category to show budget calculations and the budget narrative.



## Adding Budget Narratives

1. Single-click the green BN symbol next to a category. The Budget Categories dialog box.

 **Note:** The dialog box fields are different based on the budget category.



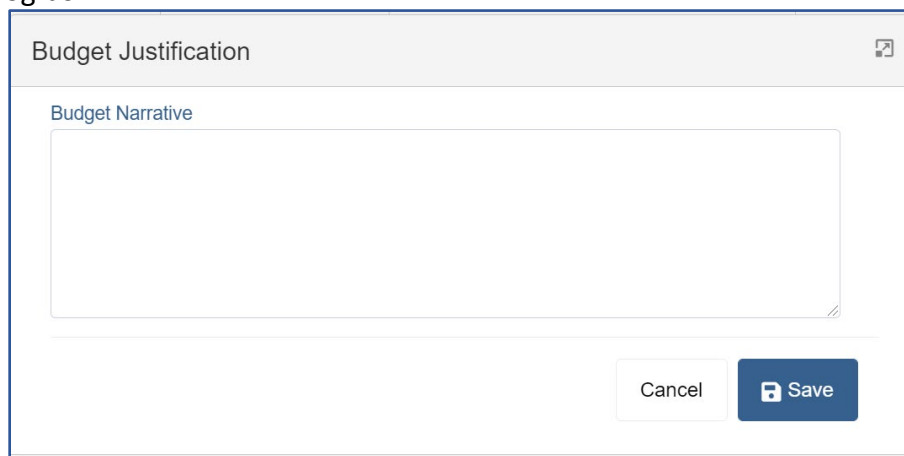
Project Name\* Farmers Market and Local Foods Prc Year\* Year 1

Save Budget Budget Instructions

Expand All	Direct	Cash Match	In-Kind Match	Total	Leveraged
▼ Personnel	\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
BN Project Director					
BN Personnel - other					
BN Equipment					
BN Travel					
Total	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

2. Add the appropriate information.

Example dialog box:



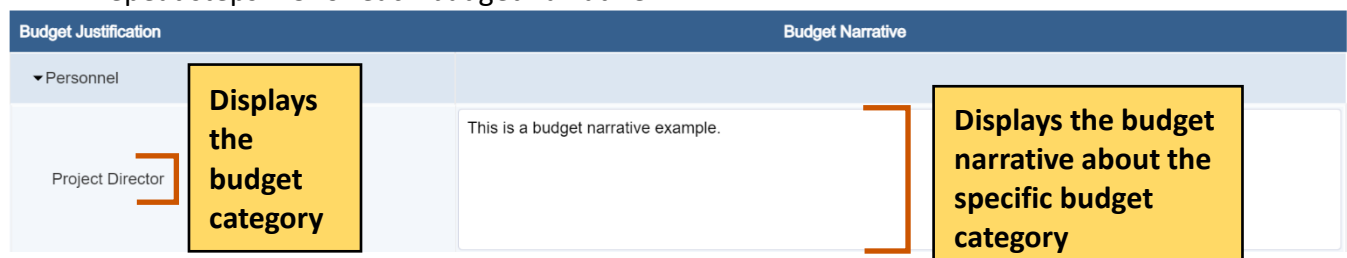
Budget Justification

Budget Narrative

Cancel Save

3. Click **Save** . The budget narrative appears in the table at the bottom of the page.

Repeat steps 1-3 for each budget narrative.



Budget Justification	Budget Narrative
▼ Personnel	
Project Director	This is a budget narrative example.

4. **Optional:** Click the BN next to the category to edit the information.

## Adding a Parent Category


1. Hover over a parent category to display the budget tools.
2. Hover over **New +**.
3. Click **New Parent Category**.

Budget Categories	Direct	Cash Match	In-Kind Match	Total	Leveraged
BN Fringe					
BN Supplies					
Total					

↑ ↓ ✎ + 🗑

**Add a parent category.**

New Parent Category  
 New Sub-Category

4. Type in the new name for the parent category.
5. Click **Save** .

**Type the name of the parent category.**



**Budget Categories**  
 BN Fringe

↑ ↓ ✎ + 🗑

**Save the parent category.**

🗑

## Editing a Parent Category

1. Hover over a parent category to display the budget tools.
2. Click **Edit** .
3. Type in the new name for the parent category.
4. Click **Save** . The new parent category appears.


**Type the new name of the parent category.**

**Budget Categories**  
 Fringe

🗑 ✕

**Save the parent category.**

## Deleting a Parent Category

1. Hover over a parent category to display the budget tools.
2. Click **Delete** . A popup appears asking if you are sure you want to delete the sub-category.

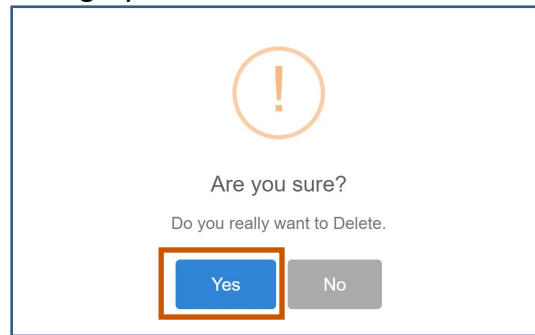
**Click the blue arrow to expand the list.**

**Expand All**  
 ▼ Personnel  
   ▶ Project Director

✎ + 🗑

**Delete the parent category.**

- Click **Yes**. The parent category is deleted.



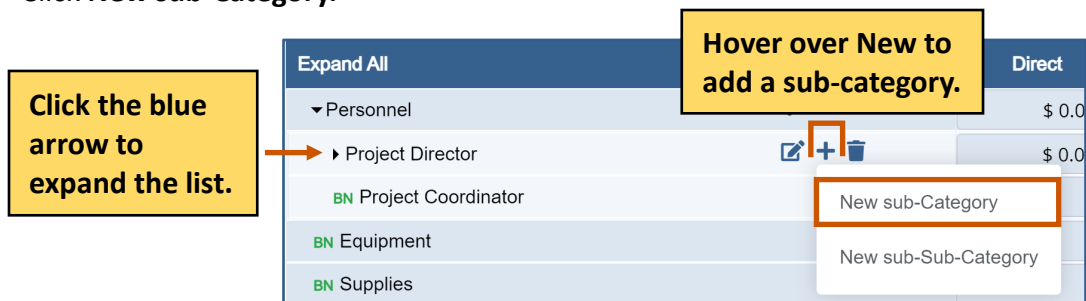
## Move a Parent Category Up or Down on the Grid

- Hover over a parent category to display the budget tools.
- Hover over **Move Up** ↑ to move the parent category up the grid.  
Or  
Click **Move Down** ↓ to move the parent category down the grid.

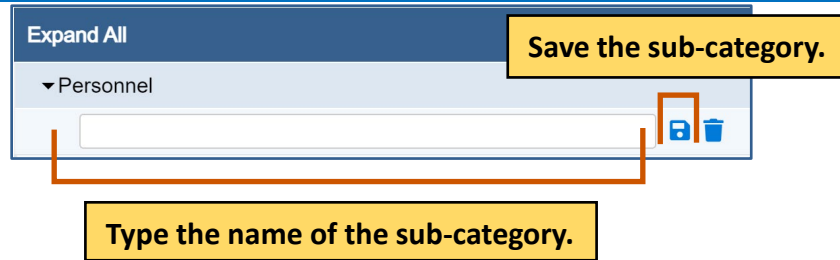
Budget Categories	Direct	Cash Match	In-Kind Match	Total	Leveraged
BN Fringe					
BN Supplies					
Total	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

## Adding a Sub-Category


- Click the blue arrow next to a parent category to expand the list.
- Hover over a sub-category to display the budget tools.
- Hover over **New** +.
- Click **New sub-Category**.




- Type in the name of the sub-category.
- Click **Save** . The sub-category is added to the grid.

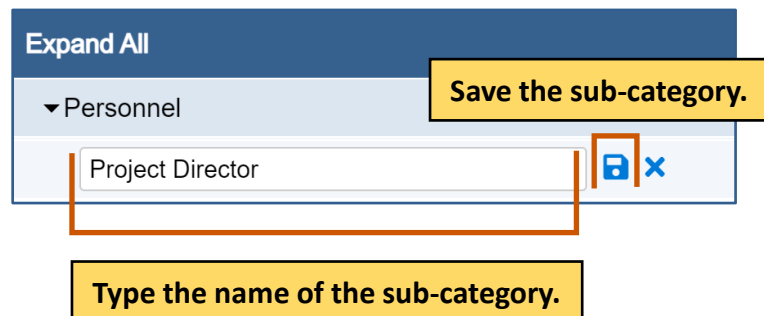


## Editing a Sub-Category


1. Click the blue arrow next to a parent category to expand the list.
2. Hover over a sub-category to view the budget tools.
3. Click **Edit** .



4. Type in the name of the sub-category.
5. Click **Save** .

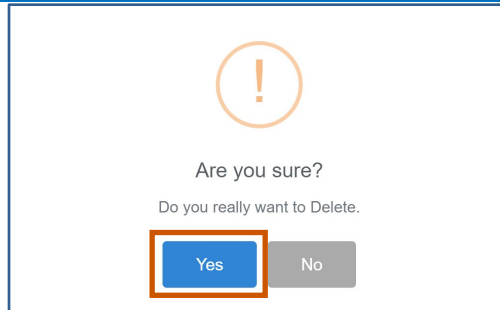


## Deleting a Sub-Category

1. Click the blue arrow next to a parent category to expand the list.
2. Hover over a sub-category to display the budget tools.
3. Click **Delete** . A popup appears asking if you are sure you want to delete the sub-category.



4. Click **Yes**. The sub-category is deleted.



## Move a Sub-Category Up or Down on the Grid

1. Hover over a sub-category to display the budget tools.
2. Hover over **Move Up** ↑ to move the sub-category up the grid.  
Or  
Click **Move Down** ↓ to move the sub-category down the grid.

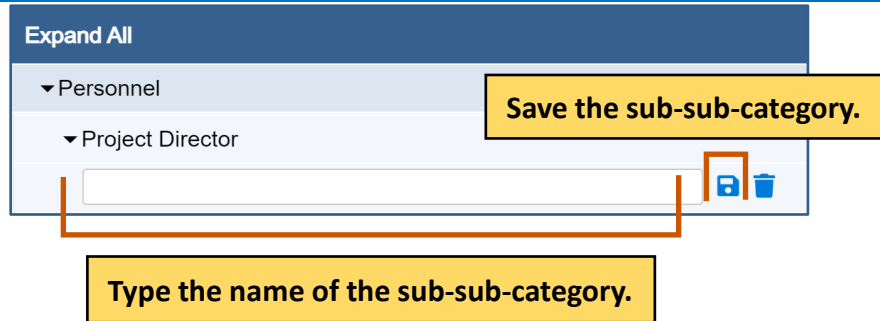


## Adding a Sub-Sub-Category


1. Click the blue arrow next to a budget category to expand the list.
2. Click the blue arrow next to a sub-category category to expand the list.
3. Hover over **New +**.
4. Click **New sub-Sub-Category**. The new sub-category is added to the grid.

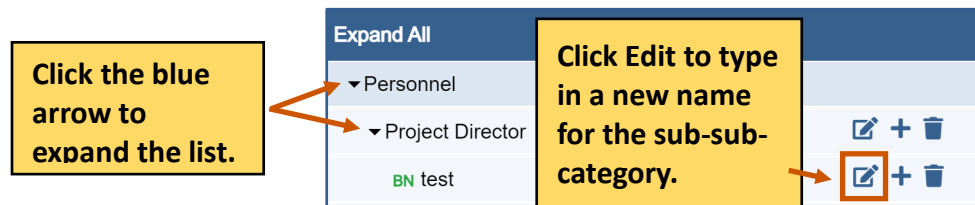



5. Type in the name of the sub-category.
6. Click **Save** 💾. The new sub-sub-category is added to the grid.

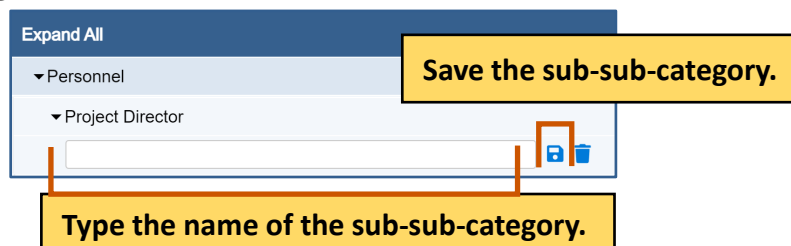


## Editing a Sub-Sub-Category


1. Click the blue arrow next to a budget category to expand the list.
2. Hover over a sub-category to view the budget tools.
3. Click **Edit** .

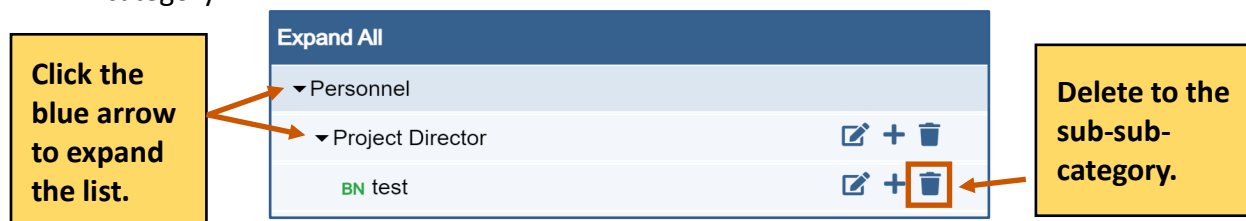


4. Type in the name of the sub-category.
5. Click **Save** .

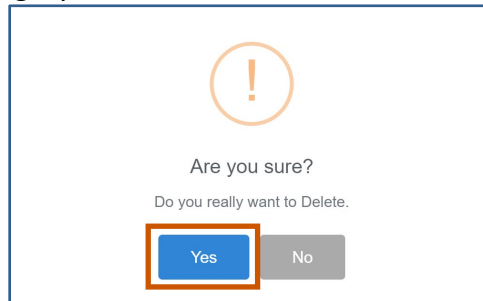


## Deleting a Sub-Sub-Category

1. Click the blue arrow next to a budget category to expand the list.
2. Hover over a sub-sub-category to view the budget tools.
3. Click **Delete** . There is a warning asking if you are sure you want to delete the sub-sub-category.



4. Click **Yes**. The sub-category is deleted.



## Move a Sub-Sub-Category Up or Down on the Grid

1. Hover over a sub-sub-category to display the budget tools.
  2. Hover over **Move Up** ↑ to move the sub-sub-category up the grid.
- Or

Click **Move Down** ↓ to move the sub-sub-category down the grid.

Budget Categories	
BN Fringe	
▼ Supplies	↑ ↓ ✎ + 🗑
▼ Widgets	↑ ↓ ✎ + 🗑
BN Laser Mouse	↑ ↓ ✎ + 🗑

## Objective Tools

You can add, edit, or delete parts of the Objective template. Use the arrows to expand the list of objectives, performance measures, and grant activities. When you are done modifying the Objective template, save it to lock it.

**Note:** Applications do not utilize live updates. Multiple users should not attempt to modify or save the same Question Answer, Objective Template, or Budget Template simultaneously as some data may be lost.

The screenshot shows the 'Objective Template' section of the GrantVantage application. It includes a top navigation bar with 'Save', 'Finish Later', and 'Application Report' options. Below this, there are tabs for 'Application', 'Objective Template', and 'Budget Template'. The main content area is divided into several sections: 'Goal', 'Objectives (1)', 'Performance Measure (1)', and 'Grant Activities (1)'. Each section has a '+ Add' button and a table of existing items. Callouts provide instructions on how to use the interface:

- Save the Objective Template or read the Objective instructions:** Points to the 'Save Objective' and 'Objective Instructions' buttons at the top right.
- Add a goal:** Points to the '+ Add Goal' button in the 'Goal' section.
- Edit or delete the goal:** Points to the edit and delete icons in the 'Goal' table.
- Use the arrow to displays the objectives:** Points to the dropdown arrow next to the 'Goal' section header.
- Add an objective:** Points to the '+ Add Objective' button in the 'Objectives (1)' section.
- Edit or delete the objective:** Points to the edit and delete icons in the 'Objectives (1)' table.
- Add a performance measure:** Points to the '+ Add Measure' button in the 'Performance Measure (1)' section.
- Add grant activity:** Points to the '+ Add Activity' button in the 'Grant Activities (1)' section.
- Edit or delete the performance measure:** Points to the edit and delete icons in the 'Performance Measure (1)' table.
- Edit or delete the grant activity:** Points to the edit and delete icons in the 'Grant Activities (1)' table.

The tables contain the following data:

Goal Name	Goal Description	Start Date	End Date
Goal		06/01/2021	05/31/2022

Objective Number	Ref. Id	Objective Name	Objective Description	To Be Determined	Start Date	End Date
1		Objective	Objective Description		06/01/2021	05/31/2022

Ref. Id	Performance Measure	Manager	Type	Planned	Actual	Active
	Performance measure	To Be Determined	Number	30		Not Started

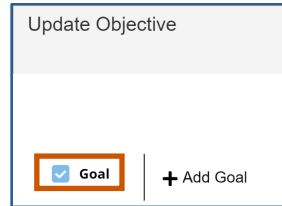
  

Ref. Id	Grant Activities	Manager	Start	Due Date	Active
	Activity 1	To Be Determined	06/01/2021	05/31/2022	Not Started

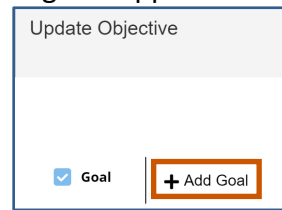


## Adding a Goal

**Note:** You can only add a goal if the Goal checklist is ticked.




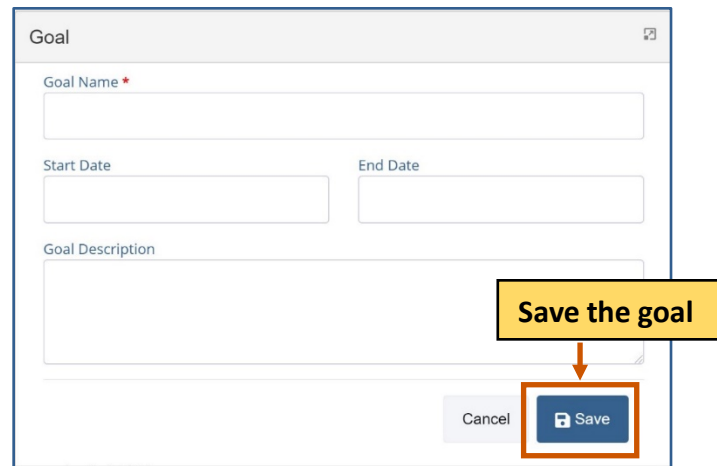
1. Click **Add Goal** . The Goal dialog box appears.



3. Fill in the necessary fields.

**Note:** The red asterisks indicate required fields.

4. Click **Save** . The goal appears in the grid. Repeat steps 1-3 for each goal you wish to add.



## Adding an Objective

**Optional:** Use the arrow next to the goal to expand the goal's objectives.

**Use the arrow to displays the objectives.**


☒ Goal    + Add Goal

Goal Name	Goal Description	Start Date	End Date	
Goal		06/01/2021	05/31/2022	<div style="border: 1px solid orange; padding: 2px;">▼</div>

Objectives (1)

+ Add Objective

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
1		Objective	Objective Description	To Be Determined	06/01/2021	05/31/2022	<div style="border: 1px solid orange; padding: 2px;">▼</div>

Click **Add Objective** . The Objective dialog box appears.

Update Objective

☐ Goal    

+ Add Objective

Fill in the necessary fields.



**Note:** The red asterisks indicate required fields.

Objective

Objective Name \*

Objective Start Date \*

Goal \*  

▼

Ref. Id

Objective Description \*


Objective Number \*

Objective End Date \*


Manager \*  

--Select Manager--


Cancel

 Save

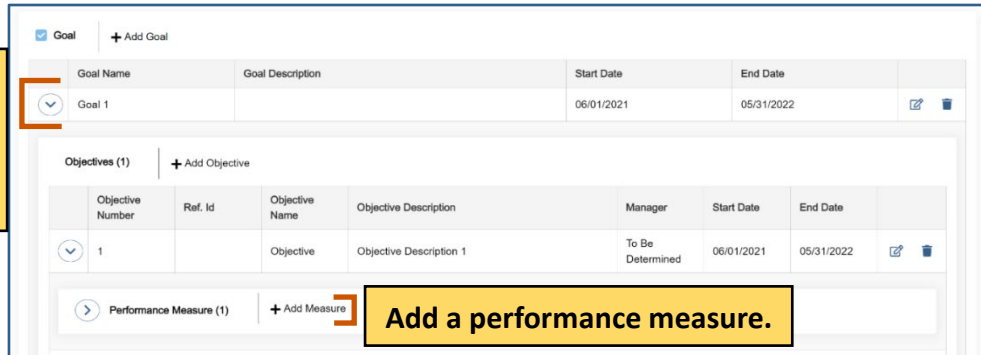
**Save the new objective**

1. Click **Save** . The objective appears in the grid. Repeat steps 2-4 for each objective you wish to add.

## Adding a Performance Measure

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Click **Add Measure** . The Performance Measure dialog box appears.

Use the arrow to displays the objectives.




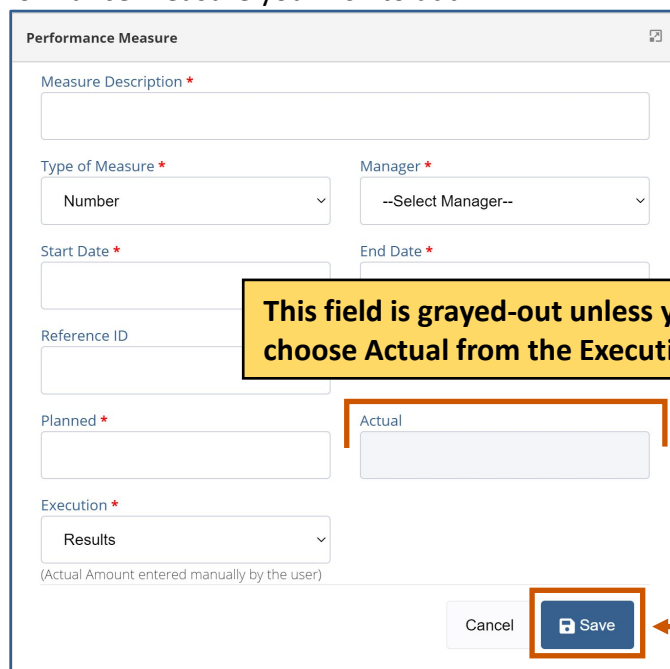
Goal Name	Goal Description	Start Date	End Date
Goal 1		06/01/2021	05/31/2022

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date
1		Objective	Objective Description 1	To Be Determined	06/01/2021	05/31/2022

Performance Measure (1) **Add Measure**

4. Fill In the necessary fields.
5. Click **Save** . The performance measure appears in the grid. Repeat steps 3-5 for each performance measure you wish to add.



**Performance Measure**

Measure Description \*

Type of Measure \* Number Manager \* --Select Manager--

Start Date \*  End Date \*

Reference ID

Planned \*  **Actual**


Execution \* Results

(Actual Amount entered manually by the user)

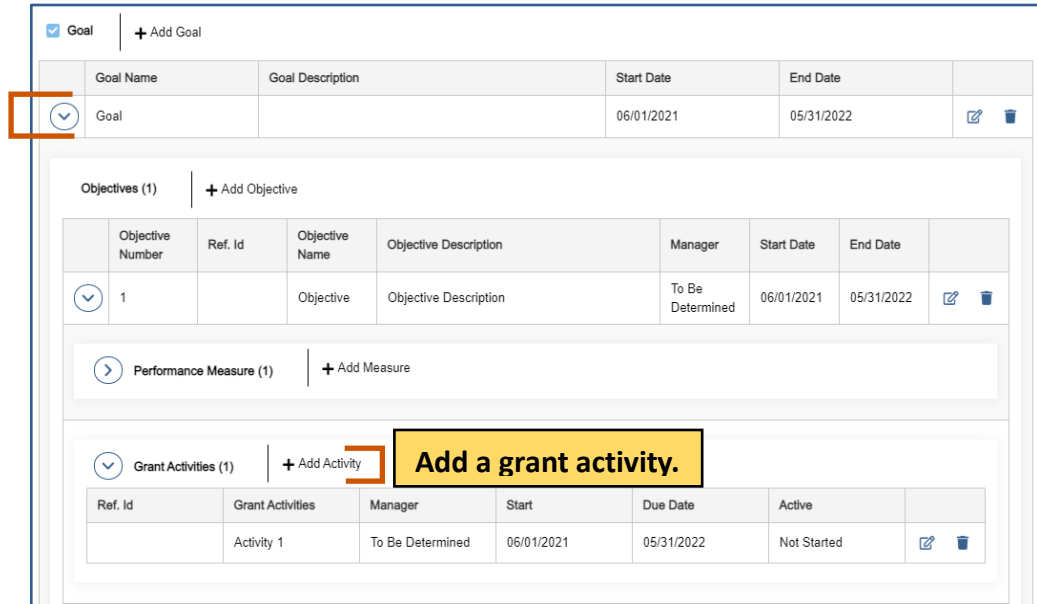
Cancel **Save**

Save the new performance measure.

## Adding a Grant Activity

1. **Optional:** Use the arrow to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Click **Add Activity** . The Grant Activity dialog box appears.

Use the arrow to displays the objectives.



The screenshot shows the 'Goal' section with a table containing one goal. Below the goal table is the 'Objectives (1)' section, which is expanded to show a table with one objective. Below the objective table is the 'Grant Activities (1)' section, which is also expanded. The 'Add Activity' button is highlighted with a red box, and a yellow callout box points to it with the text 'Add a grant activity.'


Goal Name	Goal Description	Start Date	End Date
Goal		06/01/2021	05/31/2022

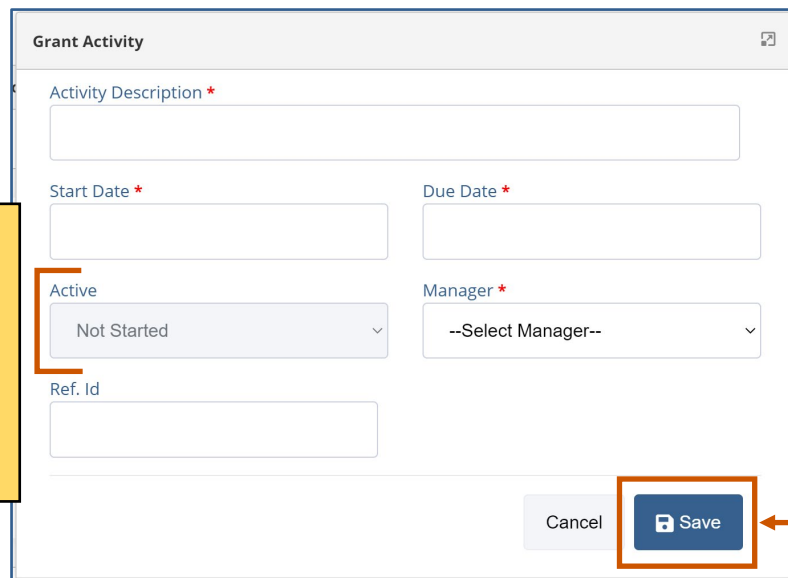
Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date
1		Objective	Objective Description	To Be Determined	06/01/2021	05/31/2022

Ref. Id	Grant Activities	Manager	Start	Due Date	Active
	Activity 1	To Be Determined	06/01/2021	05/31/2022	Not Started

4. Fill In the necessary fields.  
**Note:** The red asterisks indicate required fields.
5. Click **Save** . The grant activity appears in the grid. Repeat steps 2-4 for each grant activity you wish to add.


This field is grayed-out, which means you cannot edit it. It changes once you collect data.



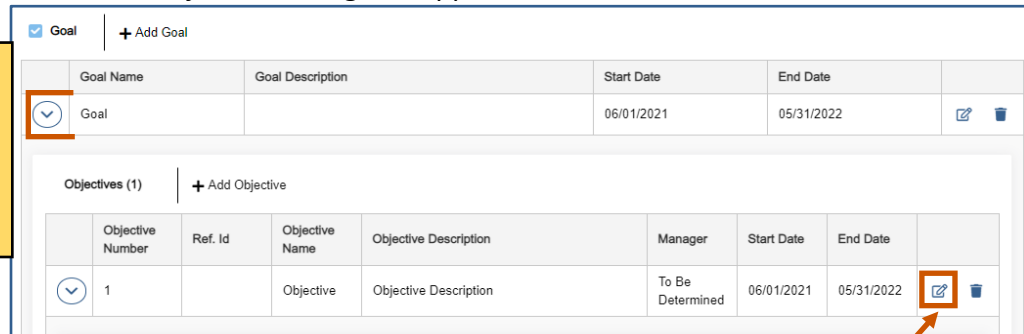
The 'Grant Activity' dialog box is shown with the following fields: 'Activity Description' (required), 'Start Date' (required), 'Due Date' (required), 'Active' (dropdown menu, currently 'Not Started'), 'Manager' (dropdown menu, currently '--Select Manager--'), and 'Ref. Id'. The 'Save' button is highlighted with a red box, and a yellow callout box points to it with the text 'Save the new grant activity.'



Save the new grant activity.

## Editing an Objective



1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Choose the objective you wish to modify.
4. Click **Edit** . The Objective dialog box appears.

Use the arrow to displays the objectives.




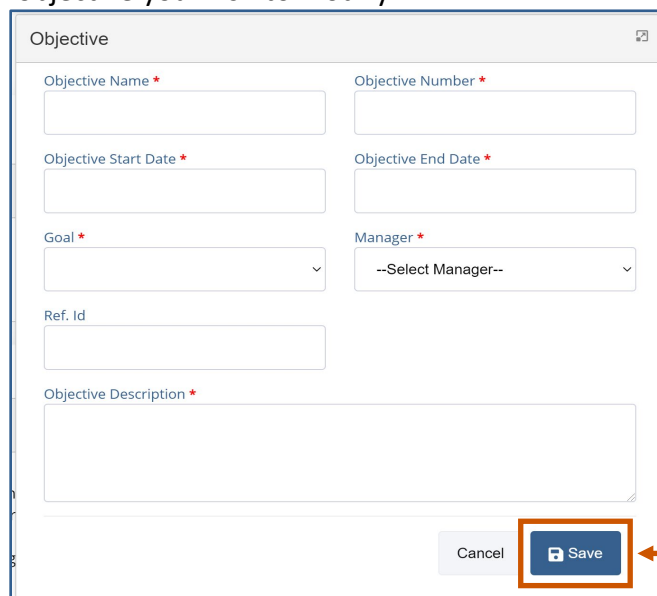
Goal Name	Goal Description	Start Date	End Date	
Goal		06/01/2021	05/31/2022	 

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
1		Objective	Objective Description	To Be Determined	06/01/2021	05/31/2022	 

Edit the objective.

5. Edit the necessary fields.
6. Click **Save** . The changes to the objective appears in the grid. Repeat steps 3-6 for each objective you wish to modify.



Objective

Objective Name \*

Objective Number \*

Objective Start Date \*

Objective End Date \*

Goal \*

Manager \*


Ref. Id

Objective Description \*

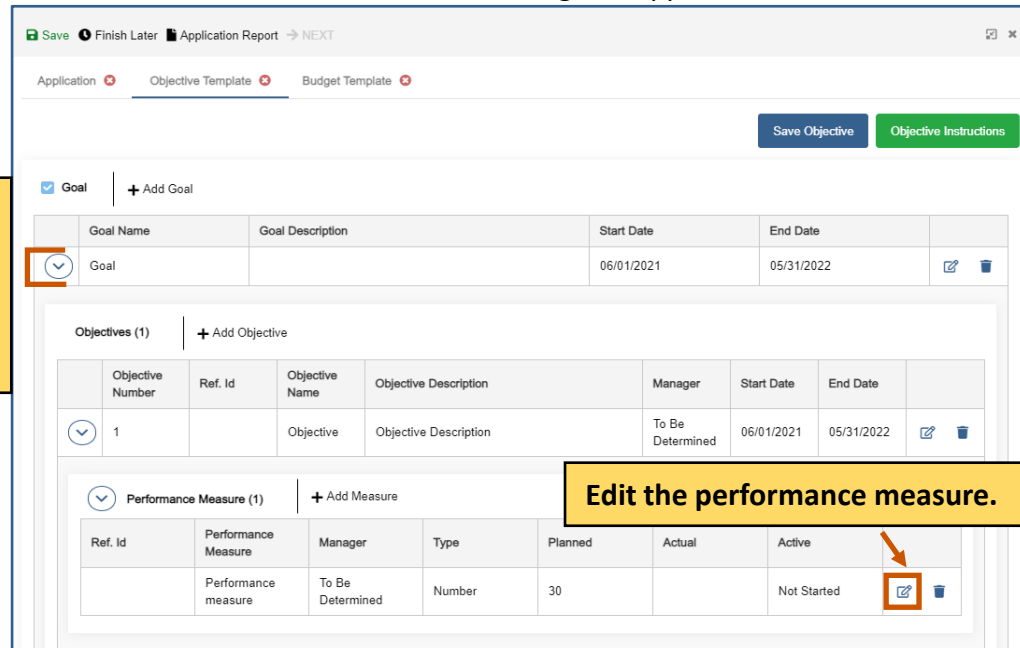
Cancel

Save the changes to the objective.

## Editing a Performance Measure

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the performance measure to expand the list.
4. Choose the performance measure you wish to modify.
5. Click **Edit** . The Performance Measure dialog box appears.

Use the arrow to displays the objectives.





Save Finish Later Application Report → NEXT



Application Objective Template Budget Template

Save Objective Objective Instructions



☒ Goal + Add Goal

Goal Name	Goal Description	Start Date	End Date	
Goal		06/01/2021	05/31/2022	 


Objectives (1) + Add Objective

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
1		Objective	Objective Description	To Be Determined	06/01/2021	05/31/2022	 

Performance Measure (1) + Add Measure

Ref. Id	Performance Measure	Manager	Type	Planned	Actual	Active	
	Performance measure	To Be Determined	Number	30		Not Started	 

Edit the performance measure.

6. Edit the necessary fields.
7. Click **Save** . The changes to the performance measure appear in the grid. Repeat steps 4-7 for each performance measure you wish to modify.

Performance Measure

Measure Description \*

Type of Measure \*  
Number

Manager \*  
--Select Manager--

Start Date \*

End Date \*

Reference ID

Planned \*

Actual

Execution \*  
Results

(Actual Amount entered manually by the user)


Cancel

Save

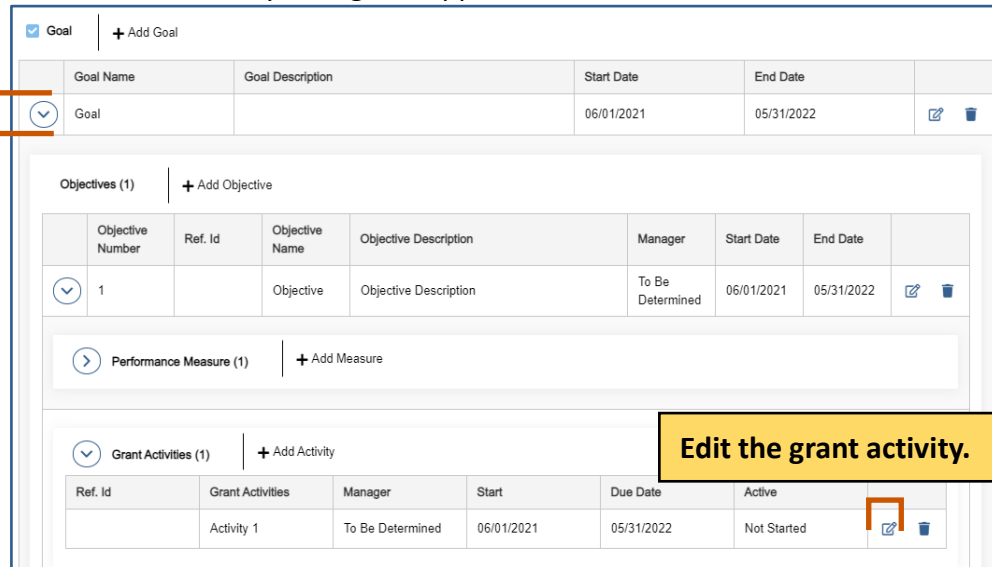
This field is grayed-out unless you choose Actual from the Execution field.



Save the changes to the performance measure.

## Editing a Grant Activity



1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the grant activity to expand the list.
4. Choose the grant activity you wish to modify.
5. Click **Edit** . The Grant Activity dialog box appears.

Use the arrow to displays the objectives.





Goal Name	Goal Description	Start Date	End Date	
Goal		06/01/2021	05/31/2022	 


  

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
1		Objective	Objective Description	To Be Determined	06/01/2021	05/31/2022	 

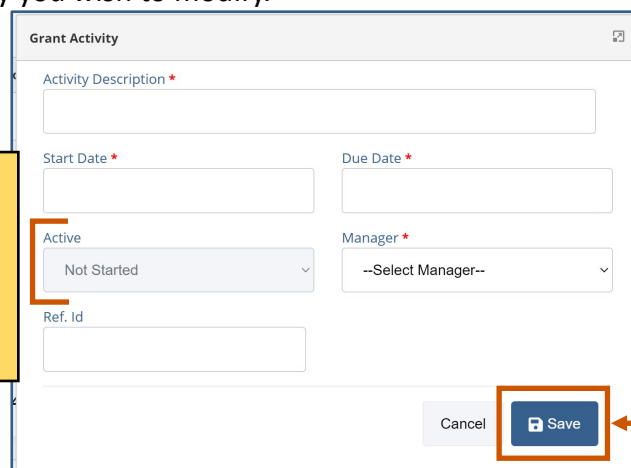
  

Ref. Id	Grant Activities	Manager	Start	Due Date	Active	
	Activity 1	To Be Determined	06/01/2021	05/31/2022	Not Started	 

Edit the grant activity.

6. Edit the necessary fields.
7. Click **Save** . The changes to the grant activity appears in the grid. Repeat steps 4-7 for each grant activity you wish to modify.


This field is grayed-out, which means you cannot edit it. It changes once you collect data.



Save the changes to the grant activity.



## Deleting an Objective

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Choose the objective you wish to delete.
4. Click **Delete** . A warning appears asking if you are sure you want to delete the objective.

Use the arrow to displays the objectives.

✓ Goal
+ Add Goal


	Goal Name	Goal Description	Start Date	End Date	
⌵	Goal		06/01/2021	05/31/2022	✎ 🗑

Objectives (1)
+ Add Objective

	Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
⌵	1		Objective	Objective Description	To Be Determined	06/01/2021	05/31/2022	✎ 🗑

Delete the objective.

5. Click **Yes**. The objective disappears from the grid. Repeat steps 3-5 for each objective you wish to delete.




Are you sure?

Do you really want to delete the Objective(s)

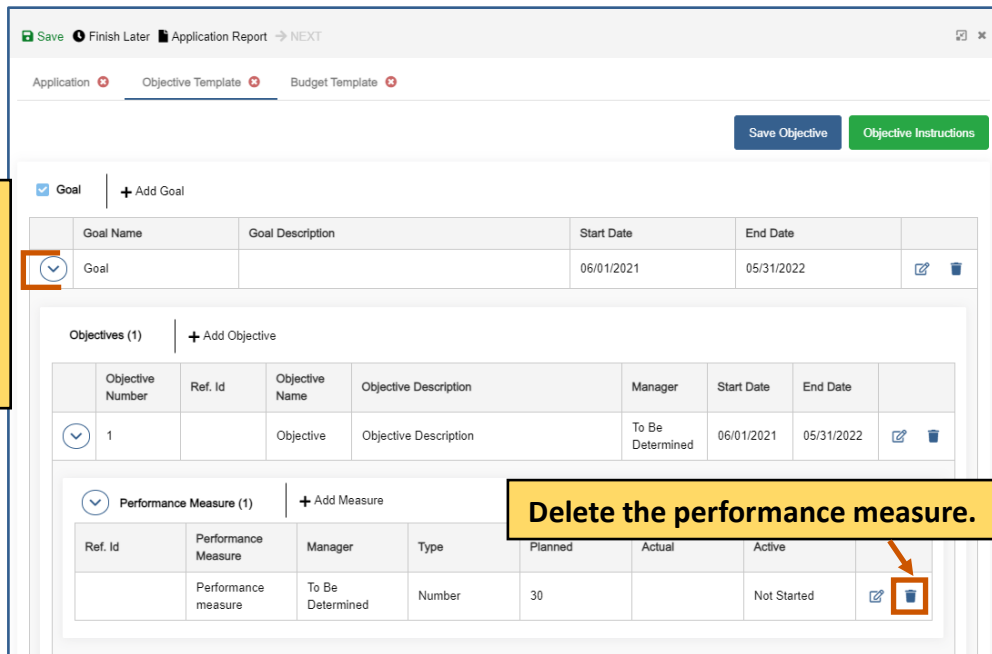
Yes

No

## Deleting a Performance Measure

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the performance measure to expand the list.
4. Choose the performance measure you wish to delete.
5. Click **Delete** . A warning appears asking if you are sure you want to delete the performance measure.

Use the arrow to display the objectives.



The screenshot shows the 'Objective Template' tab in the GrantVantage application. It displays a hierarchy of Goal, Objectives, and Performance Measures. A yellow callout box on the left points to a dropdown arrow next to the 'Goal' row, with the text 'Use the arrow to display the objectives.' A second yellow callout box on the right points to a trash icon next to a performance measure row, with the text 'Delete the performance measure.'

Goal Name	Goal Description	Start Date	End Date
Goal		06/01/2021	05/31/2022

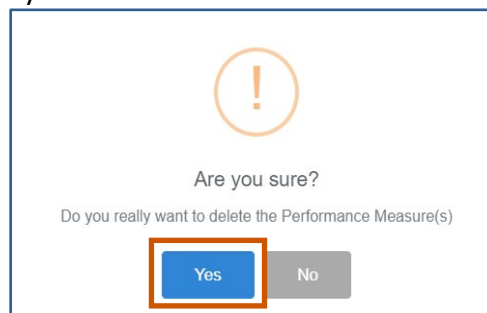
  

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date
1		Objective	Objective Description	To Be Determined	06/01/2021	05/31/2022


Ref. Id	Performance Measure	Manager	Type	Planned	Actual	Active
	Performance measure	To Be Determined	Number	30		Not Started

6. Click **Yes**. The performance measure disappears from the grid. Repeat steps 4-6 for each performance measure you wish to delete.

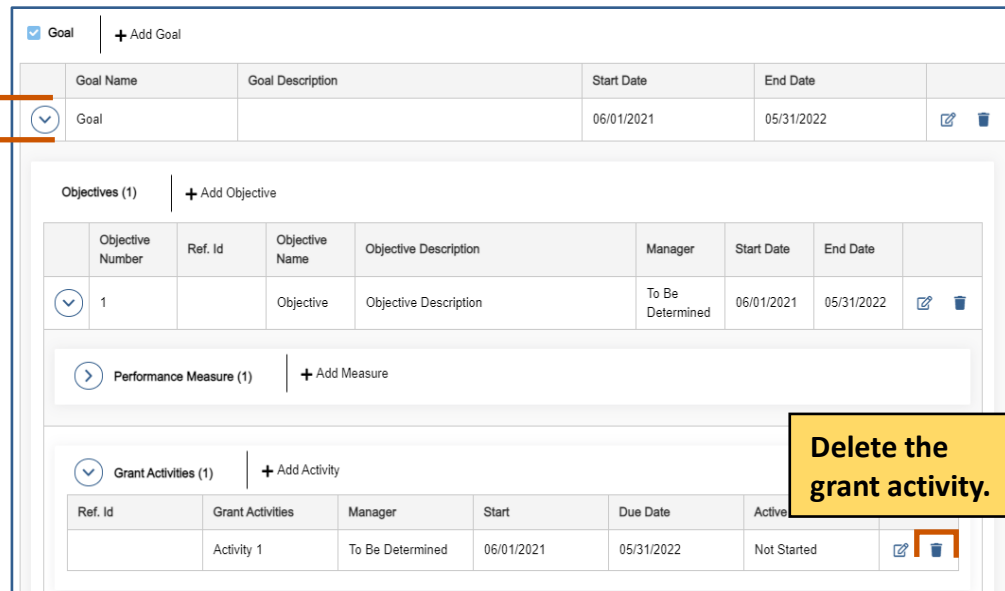




A warning dialog box with an orange exclamation mark icon. The text reads: 'Are you sure? Do you really want to delete the Performance Measure(s)'. There are two buttons: 'Yes' (highlighted with a red box) and 'No'.

## Deleting a Grant Activity



1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the grant activity to expand the list.
4. Choose the grant activity you wish to delete.
5. Click **Delete** . A warning appears asking if you are sure you want to delete the grant activity.

Use the arrow to displays the objectives.





Goal Name	Goal Description	Start Date	End Date	
Goal		06/01/2021	05/31/2022	 


Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
1		Objective	Objective Description	To Be Determined	06/01/2021	05/31/2022	 

Ref. Id	Grant Activities	Manager	Start	Due Date	Active	
	Activity 1	To Be Determined	06/01/2021	05/31/2022	Not Started	 

Delete the grant activity.

6. Click **Yes**. The grant activity disappears from the grid. Repeat steps 4-6 for each grant activity you wish to delete.



Are you sure?

Do you really want to delete the Grant Activities(s)

**Yes** No