

ATTACHMENT A DDS Applicant Instructions

Table of Contents

Table of Contents	2
Login	4
Register	5
Homepage	7
Site Map	7
Funding Announcement	9
Save an Announcement	10
View an Announcement	11
Print the Announcement as a PDF	13
View the Applicant Report	13
View the Budget Report	14
View the Objective Report	15
View Attachments associated with the Announcement	16
Submitting Applications to a Funding Announcement	17
My Application	26
Remove an Application from Saved	26
My Applicant Profile	27
Users	34
Active Users	34
Create a User	35
Edit a User	
Activate a User	37
Deactivate a User	37
Inactive Users	
Contacts	40
Add a Contact	40
Edit a Contact	42
Delete a Contact	42
Documents	44
Add a Document	44
Delete a Document	45

GrantVantage

Table of Contents

Budget Tools	
Adding Budget Values	
Adding Budget Narratives	
Adding a Parent Category	
Editing a Parent Category	
Deleting a Parent Category	
Move a Parent Category Up or Down on the Grid51	
Adding a Sub-Category	
Editing a Sub-Category	
Deleting a Sub-Category	
Move a Sub-Category Up or Down on the Grid53	
Adding a Sub-Sub-Category53	
Editing a Sub-Sub-Category	
Deleting a Sub-Sub-Category	
Move a Sub-Sub-Category Up or Down on the Grid	
Objective Tools	
Adding a Goal57	
Adding an Objective	
Adding a Performance Measure59	
Adding a Grant Activity60	
Editing an Objective61	
Editing a Performance Measure62	
Editing a Grant Activity64	
Deleting an Objective65	
Deleting a Performance Measure	
Deleting a Grant Activity	

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.

GrantVantage	Funder Portal	Log In →) Reviewer Announcements €
Announcement Name or Funding Announcement Number	Q	Sort By 🗸 🗉 📰
Better Education for Kids Fund Amount: \$10,000.00		
Application Type Initial		
■ 08-31-2021, 6:00 PM MDT ■ 08-30-2029, 6:00 PM MDT		

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 \Rightarrow . The Log In screen appears. From the Log In screen, new applicants must create a new applicant user account.

GrantVantage	Funder Portal	Log in Reviewer Announcements ₩
Announcement Name or Funding Announcement Number	٩	Sort By ∨ ≡ 👪
Better Education for Kids		
Application Type		
Initial 08-31-2021, 6:00 PM MDT 08-30-2029, 6:00 PM MDT		
♥ View		

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

Grant Va	intage n
User Name *	
example@email.com	
Password *	
Remember Me	Forgot Password?
Log In	Register
Powered by	F
Login With:	f 8

5. Fill in the necessary fields.

(i) Note: The black asterisks indicate required fields.

GrantVantage

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		

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.



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 Funding Announcement	;	Description
Funding Announcement		$\rightarrow \$	Displays all published announcements.
My Application	My Application	\bigcirc	Displays all the announcements you have saved and/or applied to.

Applicant Kings County	Site Map Options	Description
 Funding Announcement My Application My Applicant Profile Users ~ 	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 gualifications.
j⊛ Inactive	Users	View the users related to
ContactsDocuments	$\underline{\mathcal{L}}$	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.



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 T** to save the announcement to the My Application sitemap section. A green Application Saved Successfully popup appears at the bottom right of the screen.

- II'	Better Education for Kids	
	Fund Amount: \$10,000.00	
	Application Type Initial	
1	08-31-2021, 6:00 PM MDT	
	■ 08-30-2029, 6:00 PM MDT Save View	
ve tł	ne announcement to the	Application Saved Successful

View 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 **View** O. The Funding Announcement Narrative appears.

Announcement Name or Funding Announcement Number	Q	Sort By 🗸
Better Education for Kids		
Fund Amount: \$10,000.00		
Application Type Initial		
🍽 08-31-2021, 6:00 PM MDT		
■ 08-30-2029, 6:00 PM MDT	View the announcement	

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	\bigotimes	Close the announcement details.
Print PDF	8	Print the announcement details as a PDF.

Applicant Instructions

Application Report Budget Report	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						
Budget	View the budget report and see all the budget categories. You only see this option if you have applied to the announcement.						
Objective Report	View the objective report. See the objectives, performance measures, and grant activities. Yo only see this option if you have applied to the announcement.						
Attachments	View attachments associated with the application.						
4. Click Close \otimes when you are done vie	ewing the announcement details.						

Apply	⊗ Close	🔒 Print PDF	Attachments	
Better E	Education	for Kids		

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 E	ducation 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 E	ducation for	Kids	-		

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

1. Proposal Document	Applicant Response						
Program Information							
Program Plan							
APPLICANT QUESTION	APPLICANT RESPONSE	ATTACHMEN					
The future is brighter with better education.							
PROJECT SUMMARY							
unding Announcement Name:	Better Education for Kids						
Requested Amount:	sted Amount: \$5,000.00						
roject Name: oplicant Organization:	Better Education Obi-wan Organization	GrantVantage					
PPLICATION REPORT							
PPLICATION REPORT	Batter Education	CrantNantana					

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

Application Report		🔒 Print PDF	Close Minimize
APPLICATION REPORT			
Project Name: Applicant Organization: Requested Amount: Funding Announcement Name:	Better Education Obi-wan Organization \$5,000.00 Better Education for Kids		GrantVantage
PROJECT SUMMARY			
The future is brighter with better education.			
[
APPLICANT QUESTION	APPLICANT RESPONSE		ATTACHMENTS
Program Plan			
Program Information			
1. Proposal Document	Applicant Response		
			<i>@</i> 1
2. Enter Name	Applicant Response		
	Test Contact		
	1		1

View the Budget Report

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

× Close	Print PDF	Application Report	Budget Report	Objective Report	E Attachments
Better E	ducation for	Kids			

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

Project Name: Applicant Organization: Requested Amount: Funding Announcement Name:	Better Edu Obi-wan C \$5,000.00 Better Edu			GrantVantage		
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						
Cubawarda (Cubaranta)						

Budget Justification		Budget Narrative					
✓ Personnel		_		1			
Project Director	Displays the budget category	This is a budget narrative example.	Displays the budget narrative about the specific budget category				

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

Budget Report Applicant Note		🔒 Print PDF	Close	<u> </u>
BUDGET REPORT Project Name:	Better Education		Grant	Vantage
Requested Amount: Funding Announcement Name:	\$5,000.00 Better Education for Kids 35 Streams			

View the Objective Report

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



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

ective Report icant Note								Ę	👌 Print Pl	DFC	Xose _ Minimi
JECTIVE REPORT oject Name: pplicant Organization: iquested Amount: unding Announcement Name	r	Better Obi-wa \$5,000 Better	Education In Organization .00 Education for Kids							G	irantVantage
Objective Number	Ref. Id Ot Na	bjective ame	Ve Objective Description				Ма	nager	Start Da	ate	End Date
✓ 1	2491 HT	TS_TST & TS_POS	HTS_TS	T & HTS_P	os		Tes	st Contact	10/01/2	020	10/31/2020
Performance M	leasure (4)										
Ref. Id	Performance Measure	Manag	er	Туре		Planned		Actual		Active	
1417_1	Describe the sources for the data that you are reporting	Test C	ontact	Narrative					Not Started		arted
1417_2	If TX_NEW does NOT equal HTS_TST_POS, explain why.	Test C	ontact	Currency		\$100.00			Not Started		arted
1417_3	Please describe how the denominator was determined. #	Test C	ontact	Milestone				Not Start		arted	
1417_4	If coverage for this indicator is less than 90%, please explain why.	Test C	ontact	Percentag	je	50%		10% Not :		Not Started	
Grant Activities	(2)										
Ref. Id	Grant Activities		Manager		Start		Due D	Date	A	ctive	
8.1	8.1: Conducting or reorientations in testing and strengthening PI use of Screening supported sites	ducting onsite titions in index nd ening PITC and creening tool in d sites			10/01/2020		0 10/13/202		/13/2020 No		I
8.2	8.2: Conduct Dis Supportive Supe	trict rvision	Test Contact		10/01/202	0	10/14	/2020	N	lot Started	I

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

Objective Report		A Print PDF	Close	Minimize		
Applicant Note						
OBJECTIVE REPORT						
Project Name:	Zebra Zoo Enclosure	GrantVantage				
Applicant Organization:	Obi-wan Organization					
Funding Announcement Name:	Zebras Can Swim Across Streams					

Or

View Attachments associated with the Announcement



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

Click Downlo	ad 📥 to downloa	id the attachmei	nt. The a	attachment is downloaded.	
	Attachments			×	
Click the link to	Attachment Name		C	ownload the document	
document.	(6)Equal Employment Opportunity Plan (1).pdf				
	Total: 1	Use the arrows to	→ H		
Tot of c	al number locuments	documents.		Use the drop-down list to choose how many	
				documents you see in the grid at a time.	

Submitting Applications to a Funding Announcement

- 1. Click **View** next to the announcement you wish to view. The Funding Announcement Narrative 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.

Announcement Name or Funding Announcement Number	Q		Sort By 🗸 🗮 🔛
Better Education for Kids			
Fund Amount: \$10,000.00			
Application Type Initial			
₩ 08-31-2021, 6:00 PM MDT			
🝽 08-30-2029, 6:00 PM MDT		I	
B Save ♥ View	View the		
	announcement		

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.

Applicant Instructions

			Ар	plication Details			×
Click to	+ Begin New Appli	cation					
with a	Project Name	Application ID		Application Status	Last Saved On	Submission Date	
project.	Example Project Name	App-21-96	Apply	Not Started	09/07/2021	-	
	Total: 1		U	se the arrows to			10 🗸
Total nur	nber of proje	cts	se	ee more projects.	Use	the drop-dow	n list to
					you	see in the grid	l at a time

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

New Application	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	Resume	In Progress	09/07/2021		Ĩ
Lakeside Community Project	App-21-97	Apply	Not Started	09/07/2021		Ť
Total: 2						10 🗸

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

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

Applicant Instructions



Application Questions:

a. Answer all questions.

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.

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



- b. Optional: If the question requires you to attach a document, attach it to the question.
 i) 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.
 - i. Click **Choose File To Upload .** The Documents dialog box appears.

Applicant Instructions



ii. Choose from the picklist.

Or

...

Upload a new document by clicking **Choose File**.

- i. Upload the document.
- ii. Click Save 🖬 .

	Click Save.	
Use the	Documents	* C
picklist to		
choose a	Document Name	Date Uploaded
document	Example.docx	05-18-2021
you wish	Example 2.docx	Use the drop-down list to
to upload.		choose how many documents
		you see in the grid at a time.
Total number of	Save the newTotal: 2	
documents		
		Use the arrows to see
Uploa	d a new document.	more documents.
		Save the document(s)

Complete the Objective Template:

a. Click the Objective Template tab. The Objectives 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.



applicantsupport@grantvantage.com

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 X** to close the dialog box.

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

(i) 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.

(i) 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 <u>Objective Tools</u>.

Save Finish Later Application Rep Application Objective Template	ort → NEXT 3 Budget Template	0			Save		nd bar	ons
Goal + Add Goal Add Goal Goal Name	dd a goal		Start Da	le	End Date	,		
Goal 1 Objectives (1) + Add Objective Objective Ref. Id	objective	an objective	06/01/20	Manager	05/31/20	Edit to	ol	Delet tool
	Objective	Objective Description 1		To Be Determined	06/01/2021	05/31/2022	2	1
Performance Measure (1) Grant Activities (1) K the arrow to	+ Add Measur	Add a perforn	nance m	easure				

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.

Application 8	Objective Template 😢	Budget Template 8		
			Save Objective	Objective Instructions

- 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.

Application	Objective Template 📀	Budget Template 🥏
		Return to Draft Objective Instructions

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 <u>Budget Tools</u>.

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-subcategories. 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.

Applicant Instructions

DDS Applicants: Only enter values in the Direct Column		View th guidelin	e Budget Ins es to prepar	tructions fo e your bud	or specific get for subm	issior
Project Name* Farmers Market and Local Foods Prc ~	Year* Year	1	~	Save Budget	Budget Instructions	
Expand All Personnel	Dire	ect Cash Ma \$ 0.00 \$	tch In-Kind Match	Total	Leveraged \$ 0.00	
BN Project Director BN Personnel - other BN Equipment BN Travel	•		Type in amou are white.	unt in cells	that	
Single-click the green B show the budget narrat	N symbol next t tive.	to a catego	s 0.00	\$ 0.00	\$ 0.00	

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 8	Objective Template 3	Budget Template 3		
			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.



8. Click Save & Continue.



9. Fill in the necessary fields. i) Note: The red asterisks indicate required fields.

Save O Finish Later L Application Report ← F	REVIOUS 🅨	Finish	⊻ ×
Provide Project Name * Project Summary * Project Summary		Requested Amount \$ 500.00	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.
Authorized Certifying Official		Project Director/Manag	ger
Type to Search Authorized Certifying Official Project Manager/Coordinator	Q × +	Type to Search Pro	ject Director/Manager Q X +
Type to Search Project Manager/Coordinator	Q × +	Type to Search Cor	npliance/Fiscal Officer Q × +

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 Sinish Later Application Report ← PREVIOU	S ➡ Finish	۲.	×
--	------------	----	---

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.

(!)
Are you sure?
Do you really want to Submit the Application?
Yes No

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.



Remove an Application from Saved

1. From the site map, click **My Application** O. 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.



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.

My Applicant Profile : Ob	i-wan Orga	anization		
< Organization Information	Address	Users	Contact	>
Organization Name *		EIN		
Obi-wan Organization				
Organization Type		DUNS Number		
Nonprofit	~			
Website URL		Main Phone		
Fax Number				
			B S	ave

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



2. On the Organization Information tab, fill in the necessary fields.

(i) 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.

Applicant Instructions

My Applicant Profile : Obi	-wan Orga	inization		
< Organization Information	Address	Users	Contact	>
Organization Name *		EIN		
Obi-wan Organization				
Organization Type		DUNS Number		
Nonprofit	~			
Website URL		Main Phone		
Fax Number				
				_
				e

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

My Applicant Profile : C	bi-wan Organiz	zation			
< Organization Information	Address	Users	Contact	Documents	>
Mailing Address					
Address Line 1	Address Line	2	City		
County	State/Provinc	e/Region	Country		~
Postal Code					
Physical Address	Same as Mailing Add	ress			
Address Line 1	Address Line	2	City		
County	State/Provinc	e/Region	Country		~
Postal Code					
				🖬 Sa	ave

- 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.

Applicant Instructions

		My Applicant Profi	le : Obi-wan Organiza	tion				Use the
Click link t	the to	Organization Information	Address Add a user	Users Contact	Document	is Award Stat	us	drop-down list to choose how
user.	the	Full Name	Organization Name	Job Title	Phone N	lumber Err	ail	wou see in
		Test Contact	Obi-wan Organizatior	Use the ar	rows to	16789 tco	ntact@applicant.com	the grid at a time.
	of u	al number isers					G Sat	<i>r</i> e
							Save the	user

b. On the User information tab, fill in the necessary fields.
 i) Note: The red asterisks indicate required fields.

Create New User		×
User Information	Address	
	First Name *	
	Last Name *	
Joh Title		
Email Address *		
Phone Number		
User Name *		
This field is required.		
Password *		
Password (repeat) *		
Passwords do r	not match!	
	Cancel	Save

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

Create New User		×
User Information Address		
Address Line 1	Address Line 2	City
County	State/Province/Region	Country
Postal Code		Select Country
		Save the user
		Cancel Save
		Saved Successfully.

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

.		My Applicant Profile	: Obi-wan Organ	nization	Contract	Decuments	August Status		Use the drop- down list to choose
Click link viev	k the to v the	+ New Full Name	Address Add a Co Organizatio	Ontact on Name	Job Title	Documents	Phone Number	Enal	many contacts
Cont	Tota	Test Contact	Obi-wan C	Organization	Use th	e arrov ore con	vs to tacts.	tcontact@applicant.com	the grid at a time.
	of co	ontacts		L				Save the	contact

b. On the Contact Details, fill in the necessary fields. (i) Note: The red asterisks indicate required fields.

Applicant Instructions

Contact Details Address	
First Name *	Last Name *
Job Title *	Email *
Phone Number *	Fax Number

- 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.

reate new contact			×	
Contact Details	Address	_		
Address Line 1	Address Line 2	City		
County	State/Province/Region	Country		
Postal Code		•		
	Save the	e contact	to t	he grid.
		Cancel Save	,	
	6	Saved Success	fully.	

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

Му Арр	licant Profile : Obi-wan Organizatio	on				
Organiz	tation Information Address U	sers	Contact	Documents	Award Status	
Choo	ose File Save 🛇 Cancel					
Actions	Document Name	Document Typ	90		Date Uploaded	
	Budget For - Zebras Can Swim Across Streams- 28-Apr-2021-21_22_26.pdf	PDF File			04-28-2021	
	Objective For - Zebras Can Swim Across Streams-28-Apr-2021-23_16_25.pdf	PDF File			04-28-2021	
	Objective For - Zebras Can Swim Across Streams-28-Apr-2021-23_04_03.pdf	PDF File			04-28-2021	
	Application for - Zebras Can Swim Across Streams.pdf	PDF File			04-27-2021	
Total: 4					H (1	▶ H 10 ¥
						D Sava
						- Save

applicantsupport@grantvantage.com

- 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 Ap	oplicant Profile : Obi-wan Organizat	ion				
Orgai	nization Information Address	Users	Contact	Documents	Award Status	
Ex	ample.docx 🕞 Save 🚫 Cancel					
Action	s Document Name	Document Typ	9		Date Uploaded	
	Budget For - Zebras Can Swim Across Streams 28-Apr-2021-21_22_26.pdf	³⁻ PDF File			04-28-2021	
	Objective For - Zebras Can Swim Across Streams-28-Apr-2021-23_16_25.pdf	PDF File			04-28-2021	
	Objective For - Zebras Can Swim Across Streams-28-Apr-2021-23_04_03.pdf	PDF File			04-28-2021	
	Application for - Zebras Can Swim Across Streams.pdf	PDF File			04-27-2021	
Total: 4					H	< 1 → H 10 v
						Save
					e	Saved Successfully.

- 7. **Optional:** Check the status of an award.
 - a. Click the Award Status tab.

		My Applicant Profile : C Organization Information	Dbi-wan Organi Address	ization Users Cor	ntact Document	s Award Status		Use the drop- down list to
Choose an announce from the	n ment grid.	Announcement No Filter (0) Announcement Better Education for Kids		✓ Project Name Riverside Community	Search Submitted Date 09/03/2021	Amount Requested \$10,000.00	Q Status AWARD	choose how many announcements you see in the
	Total	number of	Use mo	e the arrow re annou	ws to see ncements	5.	1 ► ► 10 ► Save	grid at a time.

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

Use the search bar to find an announcement.

Applicant Instructions

My Applicant Drofile : Ohi was Orac Use the Announcement list to choose an announ Announcement No Filter (0)	nization drop-down ncement. Contact	G Use t find	the search bai an announcer	r to nent. ्
Announcement	Project Name	Submitted Date	Amount Requested	Status
Better Education for Kids	Riverside Community	09/03/2021	\$10,000.00	AWARD
Total: 0			K	1)) 10 ~
				Save

8. Click **Save I** 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 Organiz	ation				
Organization Information	Address	Users	Contac	t Docume	Award Status	-
Announcement						
No Filter (0)			~	Search		Q
Announcement		Project Name		Submitted Date	Amount Requested	Status
Better Education for Kids		Riverside Comm	unity	09/03/2021	\$10,000.00	AWARD
Total: 0					нч	
					Save the applicant prof	ile.



Users

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



Active Users

You can view active users.



1. From the site map, click **Review Management** 2 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.
- On the User information tab, fill in the necessary fields.
 Note: The red asterisks indicate required fields.

	Create New User ×
	User information Address First Name * Last Name *
Use the command to add or search for a parent organization. The default is the organization you are viewing.	Parent Organization * Riverside Community Q X Job Tite Email Address * Phone Number User Name * Password *
	Password (repeat) *

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

(i)

Note: The red asterisks indicate required fields.

		· · · · · · · · · · · · · · · · · · ·
County	State/Province/Region	Country
Postal Code		Select Country Save the use

5. 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.



Edit a User

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

+ Nev	w 🗸 Active	Deactive			
Users		Use the search ba	r to find a us	er.	
Searc	ch				Q
	Name	Email	Organization Unit	Active	
~	Donald Duck	dduck@applicant.com	Obi-wan Organization	0	
Total: 1		1	н		▶ 10 ∨
	Double	-click the user to edit			

- Edit the necessary fields for each tab.
 (i) Note: The red asterisks indicate required fields.
- 4. 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.



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.

ers							
	Use the search bar to find a user.						
Search.						Q	
~	Name		Email	Organization Unit	Active		
~					0		
Total: 1		+		н		▶ 10 ∨	

3. Click Activate **V**. 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.

Applicant Instructions

+ New Activate B De Users	Command	bar			
U	se the search bar	to find a use	er.		
Search				Q	
Name	Email	Organization Unit	Active		
Test Contact	tcontact@applicant.com	Obi-wan Organization	0		
Donald Duck	dduck@applicant.com	Obi-wan Organization	0		
Total: 2				□ 10 □	
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.

+ New	✓ Activate	Deactive
Users		

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.

(!)	
Are you sure?	
Do you really want to deactivate the User(s)	
Yes No	Deactivated Successfully

Inactive Users

You can view inactive review panels.

+ New Add a user			
Users	Use the se to choose	earch bar a user.	
ßearch			Q
Name	Email	Organization Uni	t Active
Donald Duck	dduck@applicant.c	om Obi-wan Organiz	zation 🕴
Total: 1	Use th search the us	ne arrows to — In through	
			Choose how many users are displayed in the grid at a time.

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.

	+ New Creater	ate a contact.			
	Full Name	Organization Name	Job Title	Phone Number	Email
choose a contact from	Test Contact	Obi-wan Organization	Project Manager	13037896789	tcontact@applicant. com
the grid.	Donald Duck	Obi-wan Organization	Project Director	3031231234	dduck@applicant.co m
	Total: 2	Use the a more con	rrows to see tacts.	→ H (
	Total number of				
	contacts			Use th	e drop-down list to
				choose you se	e how many contac e in the grid at a ti

Add a Contact

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



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

Applicant Instructions

	+ New Cr Contacts	eate a contac	:t.			
	Full Name	Organization Name	Job Title	Phone Number	Email	
Choose a contact	Test Contact	Obi-wan Organization	Project Manager	13037896789	tcontact@applicant. com	
from the grid.	Donald Duck	Obi-wan Organization	Project Director	3031231234	dduck@applicant.co m	
	Total: 2	Use the arro	ws to	H A		
Total number	of	see more con	ntacts.		ha dran dawa l	ist to shoose
contacts				many	contacts you s	ee in the grid

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

Contact Details	Address
First Name *	Last Name *
Job Title *	Email *
Phone Number *	Fax Number

- 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.

Applicant Instructions

Create new contact		×
Contact Details	Address	
Address Line 1	Address Line 2	City
County	State/Province/Region	Country
Postal Code		
	Sar	ve the contact
		Cancel Save

Edit a Contact

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

+ New Telete				
Contacts				
🔽 Full Name	Organization Name	Job Title	Phone Number	Email
Test Contact	Obi-wan Organization	Project Manager	13037896789	tcontact@applicant. com
Donald Duck	Obi-wan Organization	Project Director	3031231234	dduck@applicant.co m
Total: 2	1		нч	1) H 10 V
Double-	click the conta	act to edit i	t.	

- Edit the necessary fields for each tab.
 Note: The red asterisks indicate required fields.
- 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.

Applicant Instructions

∔ New 👕 🛙	Delete			
Contacts				
Full Name	Organization Name	Job Title	Phone Number	Email
Test Contact	Obi-wan Organization	Project Manager	13037896789	tcontact@applicant. com
Donald Duck	Obi-wan Organization	Project Director	3031231234	dduck@applicant.co m
Total: 2	lick the radio butto ame of contact to c ommand bar.	n next to the lisplay the	Re	

2. Click **Delete T**. 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.

(!)	
Are you sure?	
Do you really want to delete the Contact(s)	
Yes No	Deleted Successfully.

Documents

View documents related to the application.



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.

Documents			
Choose File	B Save	🛇 Cancel	
	ŧ		
Documents			
Example 2.docx	B Save	⊘ Cancel	

Delete a Document

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

Documen	ts			
Telete				
Search				Q
Actions	Document Name	Document Type	Date Updated	
	Application for - Better Education for Kids.pdf	PDF File	09-05-2021	
Total: 1	Click the radio button next of contact to display the co	t to the name ommand bar.		₩ 10 ₩

2. Click **Delete 1**. 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.

(!)	
Are you sure?	
Do you really want to delete the Document(s)	
Yes No	Deleted Successfully.

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.

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.

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

						Save Budget	Budget Instructions
Project Name*	Farmers Market and Local Foods Prc 🗸 🗸	Year*	Year 1		~		
Expand All			Direct	Cash Match	In-Kind Match	Total	Leveraged
✓ Personnel			\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
BN Project BN Persor BN Equipme BN Travel	t Director Budget anel - other tools +			Typ are	e in amou white.	nt in cells	that
Total	Single-click the green BN s show budget calculations	ymbol n and the	ext to a budget r	category f	\$ 0.00	\$ 0.00	\$ 0.00

Budget Justification	Budget Narrative		
Personnel Displays the budget category	This is a budget narrative example.	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.						
roject Name*	Farmers Market and Local Foods Prc 🗸 🗸	Year*	Year 1		~	Save Budget	Budget Instructior	
Expand All			Direct	Cash Match	In-Kind Match	Total	Leveraged	
 ✓ Personnel BN Project 	t Director Budget		\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00	
BN Person BN Equipmen BN Travel	nnel - other tools			Type whit	e in amount te.	in cells tha	it are	
Total	Single-click the green BN sym budget calculations and the b	bol next t oudget na	to a categ rrative.	ory to sho	\$ 0.00	\$ 0.00	\$ 0.00	

Adding Budget Narratives

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.

			-			Save Budget	Budget Instructions
Project Name* Farmers Market and Local Foods Prc 🗸		Year*	Year 1	~			
Expand All	Single click the groop		Direct	Cash Match	In-Kind Match	Total	Leveraged
✓ Personnel	BN symbol next to a		\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
BN Project Director	category to display						
BN Equipment	budget calculations and the budget						
BN Travel	narrative.						
Total			\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

2. Add the appropriate information.

Example dialog box:

Budget Justification		E
Budget Narrative	Cancel	B 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	Displays							
Project Director	the budget category	This is a budget narrative example.	Displays the budget narrative about the specific budget category					

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

Budget Tools

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	↑ ↓ 0	2 + 🖬		_			
Total	Add a parent	New	Parent Category	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
	category.	New	V Sub-Category				

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

	Budget Categories		
True the new sof	BN Fringe	\uparrow ·	
the parent category.		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.

	Budget Categories	
Type the new name of the parent category.	Fringe	B×
	·	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 subcategory.

		Expand All	Delete the parent category		
Click the blue arrow		▼Personnel	Delete the parent category.		
to expand the list.	expand the list.	 Project Director 			

3. Click Yes. The parent category is deleted.





Move a Parent Category Up or Down on the Grid

- 1. Hover over a parent category to display the budget tools.
- Hover over Move Up
 to move the parent category up the grid.
 Or
 Or

Click **Move Down** \mathbf{V} to move the parent category down the grid.

Budget Categories		Direct	Cash Match	In-Kind Match	Total	Leveraged
BN Fringe	↑↓ ♂ +盲					
BN Supplies	↑↓ 🗹 + 🔋					
Total		\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Adding 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. Hover over New +.
- 4. Click New sub-Category.

	Expand All	Hover over New to	Direct
Click the blue	▼Personnel	aut a sub-category.	\$ 0.0
arrow to	→ Project Director	☑ + 💼	\$ 0.0
expand the list.	BN Project Coordinator	New sub-Categ	ory
	BN Equipment	New sub-Sub-C	Category
	BN Supplies		

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

Budget Tools

GrantVantage

Expand All Save the sub-categ		
✓ Personnel		
Type the name of the sub-cate	gory.	

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 🗹.

	Expand All	Click Edit to type in a new
Click the blue arrow	→ Personnel	name for the sub-category.
to expand the list.	Project Director	2 + 1

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

Ехр	and All	
▼ F	Personnel	Save the sub-category.
	Project Director	B×
	Type the name of the sub	-category.

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 subcategory.

	Expand All			
			Doloto tho sub	catogory
Click the blue arrow	Personnel		Delete the Sub-	category.
to expand the list				
	▶ Project Di	rector	🗹 🕂 盲	

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

Budget Tools

GrantVantage

[)
Are you s	sure?
Do you really wan	nt to Delete.
Yes	No

Move a Sub-Category Up or Down on the Grid

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

Click **Move Down** \mathbf{V} to move the sub-category down the grid.

Budget Categories	
BN Fringe	
▼ Supplies	↑↓ 🗹 + 🛢
 ✓ Widgets 	↑↓ ♂ +≣

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.

GrantVantage

Budget Tools

Expand All	
✓ Personnel	Save the sub-sub-category.
✓ Project Director	
Type the name of the sub-su	ıb-category.

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 🗹.

	l	Expand All	Click Edit to turo	
Click the blue		▼	in a new name	
arrow to		✓ Project Director	for the sub-sub-	🗹 +
expand the list.		BN test	category.	→ 🗹 + 🗑

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

Expand All	
✓Personnel	Save the sub-sub-category.
Type the name of the second	ıb-sub-category.

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-subcategory.

	Expand All	
Click the	▼ Personnel	Delete to the
to expand	✓ Project Director	sub-sub-
the list.	BN test 🗹 + 🗊 🔶	category.



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

!	
Are you sure?	
Do you really want to Delete.	
Yes No	

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

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

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

Budget Categories	
BN Fringe	
▼ Supplies	↑↓ 🗹 + 📋
 ✓ Widgets 	↑↓ 🗹 + 📋
BN Laser Mouse	^ ↓ 🗹 + 🗑

Objective Tools

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.

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.

	Save ♥ Finish Later ■ Application Report → NEX	CT	Save the Objective read the Objective	e Template or instructions
	Application Objective Template O Bud	get Template 🤤	Save Objectiv	ve Objective Instructions
Use the arrow to	Goal Add Goal Add a g	goal lion	Edit or del Start Date End Date 06/01/2021 05/31/2022	ete the goal.
displays the	Objectives (1) + Add Objective	Add an objective		
objectives.	Objective Number Ref. Id Objective Name Image: Comparison of the second secon	Objective Description Objective Description	Edit or delete 1	5/31/2022
	Performance Measure (1)	Add Measure Add a per	formance measure.	
	Ref. Id Performance Max Measure To measure Def	nager Type Plann Be termined Number 30	ed Actual Active Not Started	
	Add grant act	ivity Edit or o	delete the performa	nce measure.
	Ref. Id Grant Activities Activity 1	Manager Start To Be Determined 06/01/2021	Due Date Active 05/31/2022 Not Started	
			Edit or delete the	grant activity.

Adding a Goal

(i) Note: You can only add a goal if the Goal checklist is ticked.

Update Objec	tive
🔽 Goal	╋ Add Goal

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

Update	Objective	
🔽 Ga	al +	Add Goal

- 3. Fill in the necessary fields.
- **i** 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.

Goal		23
Goal Name *		
Start Date	End Date	
Goal Description		
	Save the	goal
	Cancel Save	

Objective Tools

Adding an Objective

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

	🗹 G	oal	+ Add Goa	al										٦
Use the arrow	Goal Name				Goa	Goal Description			ate	End Dat	End Date			
to displays the	\odot) G	bal					06/01/2	021	05/31/20	122		2	
objectives.		Obje	ctives (1)	+ Add Ot	bjectiv	e								
			Objective Number	Ref. Id		Objective Name	Objective Description		Manager	Start Date	End Date			
	($\overline{\mathbf{v}}$	1			Objective	Objective Description		To Be Determined	06/01/2021	05/31/2022	ď	Î	

Click Add Objective +. The Objective dialog box appears.

Update Objec	otive	
Goal	+ Add Objective	

Fill in the necessary fields.	
(i)	

bjective	2	
Objective Name *	Objective Number *	
Objective Start Date *	Objective End Date *	,
Goal *	Manager *	
Ref. Id		
Objective Description *		
		Save the new
	Cancel 🕞 Save 🗲	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	Goal Name Goal 1 Objectives (1)	Goal	Description	Start D 06/01/	ate 2021	End Date 05/31/20	End Date 05/31/2022		
objectives.	Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date		
	I Performance M	leasure (1)	Objective + Add Measur	Objective Description 1 • Add a performant	To Be Determined	06/01/2021	05/31/2022	ď	•

- 4. Fill In the necessary fields.
 - **i Note:** The red asterisks indicate required 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		2	
Measure Description *			
Type of Measure *	Manager *		
Number	~Select Manager	~	
Start Date *	End Date *		
Reference ID	This field is grayed-o choose Actual from t	ut unless you he Execution fi	eld.
Planned *	Actual		
Execution *			
Results (Actual Amount entered manually by	(he user)	B 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.

		🗹 Go	al +	Add Goal										
llso tho			Goal Name	e	Go	al Description			Start Dat	te	End Date	3		
arrow to		\odot	Goal						06/01/20)21	05/31/20	22	(2 🗎
displays the		(Objectives (1) +	Add Object	ve								
objectives.			Object Numb	tive Re er	f. Id	Objective Name	Objective Descripti	on		Manager	Start Date	End Date		
		(1			Objective	Objective Descript	ion		To Be Determined	06/01/2021	05/31/2022	ď	Î
	Performance Measure (1) + Add Measure Grant Activities (1) + Add Activity Add a grant activity.													
			Ref. Id Gr		Grant Act	ivities	Manager	Start	Due	e Date	Active			
					Activity 1		To Be Determined	06/01/2021	05/31/2022		Not Starte	d 🛛	1	

- 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.

	Grant Activity		2	
	Activity Description *	Due Date *		
This field is grayed-out, which means you cannot edit it. It changes once you collect data.	Active Not Started	Manager * Select Manager	v :	Save the new
		Cancel 🕞 Save		grant activity.

Objective Tools

Objective Tools

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 C**. The Objective dialog box appears.

	-	Goal	+ Add Goa	al								
Use the		Go	oal Name		Goal Description	ate	End Dat	e				
arrow to	\odot) Go	bal				06/01/2	2021	05/31/2	022	ď	Î
displays			1									
the		Objec	ctives (1)	+ Add O	bjective							
objectives.			Objective Number	Ref. Id	Objective Name	Objective Description		Manager	Start Date	End Date		
		\odot	1		Objective	Objective Description		To Be Determined	06/01/2021	05/31/2022	2	
l								1		/		
									Ed	it the o	bject	ive.

5. Edit the necessary fields.

(i) Note: The red asterisks indicate required 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		2	
Objective Name *	Objective Number *		
Objective Start Date *	Objective End Date *		
Goal *	Manager * Select Manager		
Ref. ld			
Objective Description *			
			Save the
	Cancel	ave	objective.

Objective Tools

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 C**. The Performance Measure dialog box appears.

	🖬 Save 🕚 Finish Later 🗎	Application Report	→ NEXT								2
	Application 3 Objec	tive Template 🕴	Budget Ten	nplate 🕴							
								Save O	bjective	bjective Insti	ructions
	Goal + Add Go	al									
Use the	Goal Name	Goal	Description			Start	Date	End Dat	е		
displays	Goal					06/0	1/2021	05/31/20	022	ľ	Ŧ
the	Objectives (1)	+ Add Objective	3								
objectives.	Objective Number	Ref. Id	Objective Name	Objective Descr	iption		Manager	Start Date	End Date		
	✓ 1		Objective	Objective Desc	ription		To Be Determined	06/01/2021	05/31/2022	c'i	ī
	Performan	ce Measure (1)	+ Add M	easure		Edi	t the pe	forma	ance m	easu	re.
	Ref. Id	Performance Measure	Manage	r Type		Planned	Actual	Active			
		Performance measure	To Be Determi	ined Num	ber	30		Not St	arted [2	

- 6. Edit the necessary fields.
- (i) Note: The red asterisks indicate required 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.

GrantVantage

Objective Tools

erformance Measure		2
Measure Description *		
Type of Measure *	Manager *	
Start Date *	End Date *	
Planned *		
Execution *	\	
(Actual Amount entered manual	ly by the user)	Cours the changes to the

Objective Tools

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 C**. The Grant Activity dialog box appears.

		🗹 Goa	Goal + Add Goal											
lies the			Goal Name	Go	Goal Description					End Date	•			
Use the		\odot	Goal					06/01/202	1	05/31/20	22	ď	Î	
arrow to														
displays		c	Dbjectives (1) +	Add Objecti	ive									
the obiectives.			Objective Number Ref. Id Objective Name Objective Description		on	Ν	Manager	Start Date	End Date					
,		6	1		Objective	Objective Descripti	Objective Description		To Be Determined	06/01/2021	05/31/2022	2		
	Performance Measure (1) + Add Measure													
		Grant Activities (1) + Add Activity Edit the grant activity												
			Ref. Id	Grant Act	tivities	Manager	Start	Due Date Active						
				Activity 1		To Be Determined	06/01/2021	05/31/2022 Not Started 🗹 👕			3 1			

6. Edit the necessary fields.

i Note: The red asterisks indicate required 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.

	Grant Activity Activity Description *			
This field is grayed- out, which means you cannot edit it. It	Active Not Started	Due Date * Manager *Select Manager	·	
collect data.	Ref. Id	Cancel Gave		Save the changes to the grant activity.

Objective Tools

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	 ✓ 	ioal Gi	le 022	ď 🗊							
the objectives.		Obje	ctives (1)	+ Add Ob	jective			Delete	the obj	ective.	
			Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	1	
		\odot	1		Objective	Objective Description	To Be Determined	06/01/2021	05/31/2022	ď 🔋	

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.

	Save Sinish Later	pplication Report	NEXT									g x
	Application 3 Objection											
									Save C)bjective	bjective Inst	ructions
lise the	✓ Goal + Add Goa	ıl										
ose the	Goal Name	Goal D	Description				Start Dat	е	End Da	te		
displays	Goal						06/01/20	21	05/31/2	022	ď	Ĩ
the	Objectives (1)	Objectives (1) + Add Objective										
objectives.	Objective Number	Ref. Id C	Dbjective Name	Objective [Description			Manager	Start Date	End Date		
	✓ 1	c	Objective	Objective [Description			To Be Determined	06/01/2021	05/31/2022	c' i	ř
	Performanc	e Measure (1)	+ Add Me	easure		Del	ete	the pe	rform	ance n	าeasu	ıre.
	Ref. Id Performance Manager Type Planned Actual										<u> </u>	
		Not S	Not Started									

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



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.

	Goal 🕇 Add Goal											
line the	Goal Name	Goal Description	1	S	Start Date	End Date	•					
Use the	Goal			0	6/01/2021	05/31/20	22	ď 🔋				
displays	Objectives (1) + Add Objective											
objectives.	Objective Number	Ref. Id Objective Name	Objective Description	Manager	Start Date	art Date End Date						
	1	Objective	Objective Descripti	on	To Be Determined	06/01/2021	05/31/2022	2 1				
	> Performance M	Measure (1) + Add	I Measure									
	Grant Activities (1) + Add Activity Performance Provide Activity											
	Ref. Id	Grant Activities	Manager	Start	Due Date	Active	Active					
	Activity 1 To Be Determined 06/01/2021 05/31/2022 Not Started [

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

