GrantVantage®

ATTACHMENT A
DDS Applicant Instructions
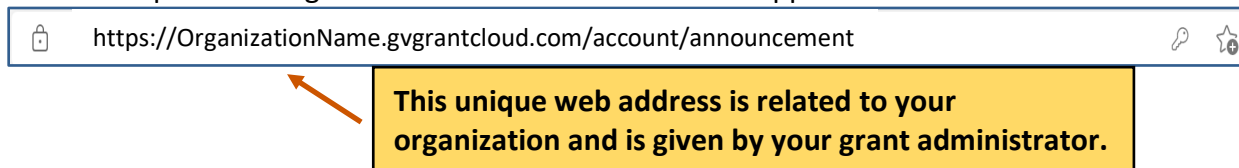
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Table of Contents

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.

🔒   https://OrganizationName.gvgrantcloud.com/account/announcement   🔑 ⭐

This unique web address is related to your organization and is given by your grant administrator.

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.
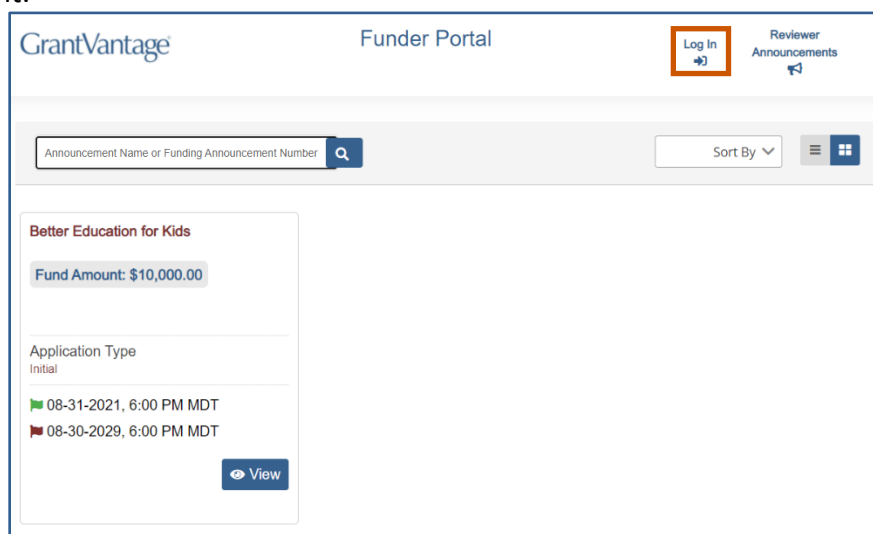
Register

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.
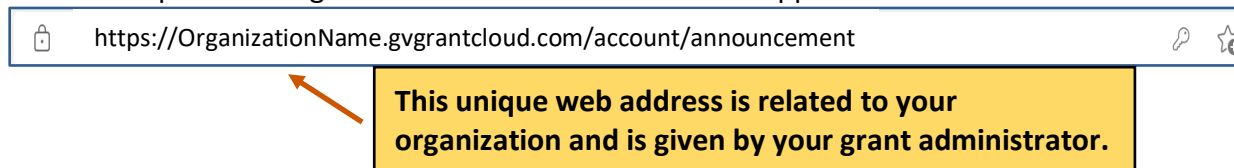
https://OrganizationName.gvgrantcloud.com/account/announcement

This unique web address is related to your organization and is given by your grant administrator.

3. Click **Log In** ➡. The Log In screen appears. From the Log In screen, new applicants must create a new applicant user account.
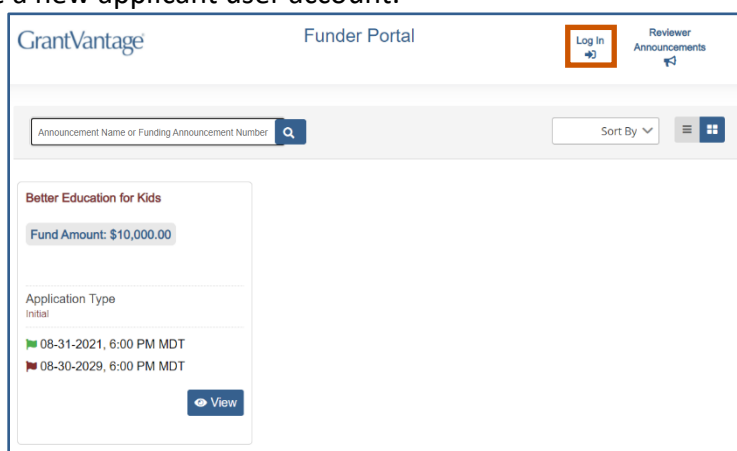
4. Click **Register.** You can now begin the registration process.
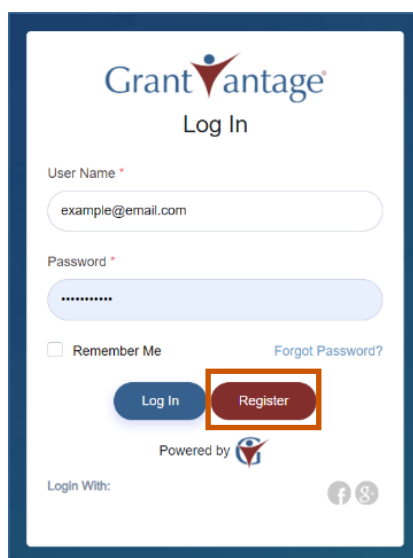
5. Fill in the necessary fields.
   ⓘ **Note:** The black asterisks indicate required fields.

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.

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.

Choose the view display for the announcement

Use the search bar to choose an announcement.

Applicant	Announcement Name or Funding Announcement Number 🔍
Obi-wan Organization	

📁 Funding Announcement
👁 My Application
👁 My Applicant Profile
👥 Users
👁 Contacts
📄 Documents

Sort By ⌄ ≡ ▦

Funding Announcement
Funding Amount
Newly Posted
Closing Soon

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

💾 Save 👁 View

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	**Funding Announcement** 📁	Displays all published announcements.
👁 My Application	**My Application** 👁	Displays all the announcements you have saved and/or applied to.

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	Site Map Options	Description

Applicant
Kings County
 	
Funding Announcement
My Application
My Applicant Profile
Users
  Active
  Inactive
Contacts
Documents
	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.

Choose the view display for the announcement

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

Announcement Name or Funding Announcement Number

Use the search bar to choose an announcement.

Sort By

Funding Announcement
Funding Amount
Newly Posted
Closing Soon

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

Save **View**

View the announcement

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

Save the announcement to the My Application page.

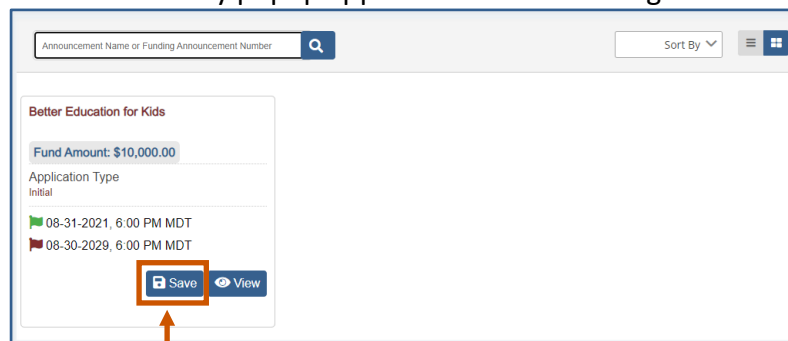## Save an Announcement

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

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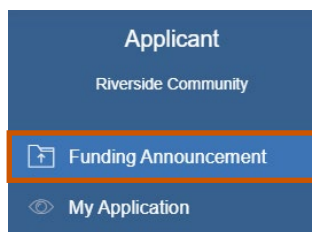

Save the announcement to the My Application page.

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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** 👁 . The Funding Announcement Narrative appears.
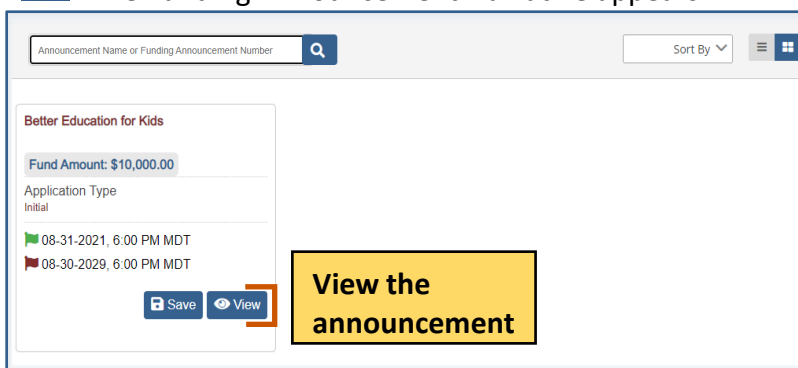
Use the command bar to view information about the announcement. The command bar changes depending on whether you applied to the announcement.

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

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. You only see this option if you have applied to the announcement.
Attachments	📄	View attachments associated with the application.
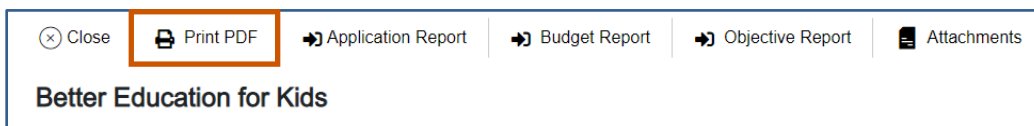
4. Click **Close** ⊗ when you are done viewing the announcement details.

➡ Apply ⊗ Close 🖨 Print PDF 📄 Attachments

Better 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.
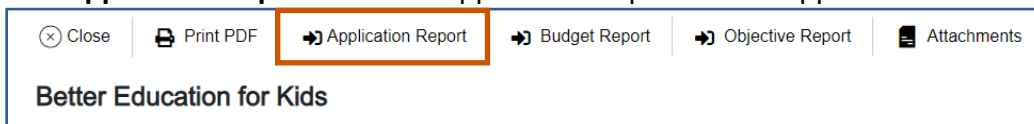
View the Applicant Report

You only see this option if you have applied to the announcement.
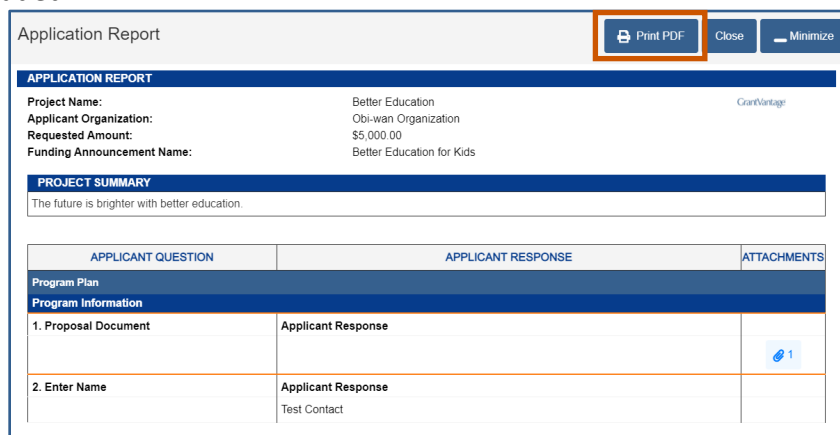
1. Click **Application Report** ➡️ **.** The Application Report screen appears.

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

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

View the Budget Report

1. Click **Budget Report** ➡️ **.** The Budget 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 budget report as a PDF. The PDF is downloaded.

Budget Report
Applicant Note

BUDGET REPORT

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

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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)					
Total	$60,500.00	$5,000.00	$10,000.00	$75,500.00	$300.00

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

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

Budget Report
Applicant Note

Print PDF   Close   Minimize

BUDGET REPORT

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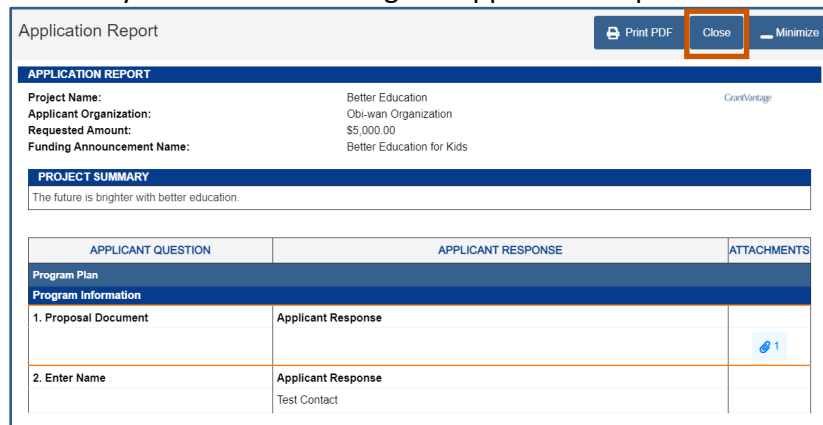
GrantVantage

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
Applicant Note   Print PDF   Close   Minimize

OBJECTIVE REPORT

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

Objective 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
Applicant Note   Print PDF   Close   Minimize

OBJECTIVE REPORT

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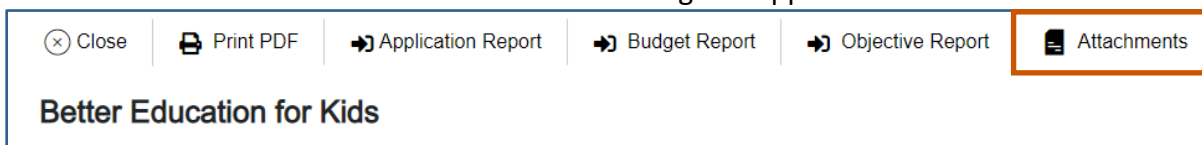Applicant Organization: Obi-wan Organization
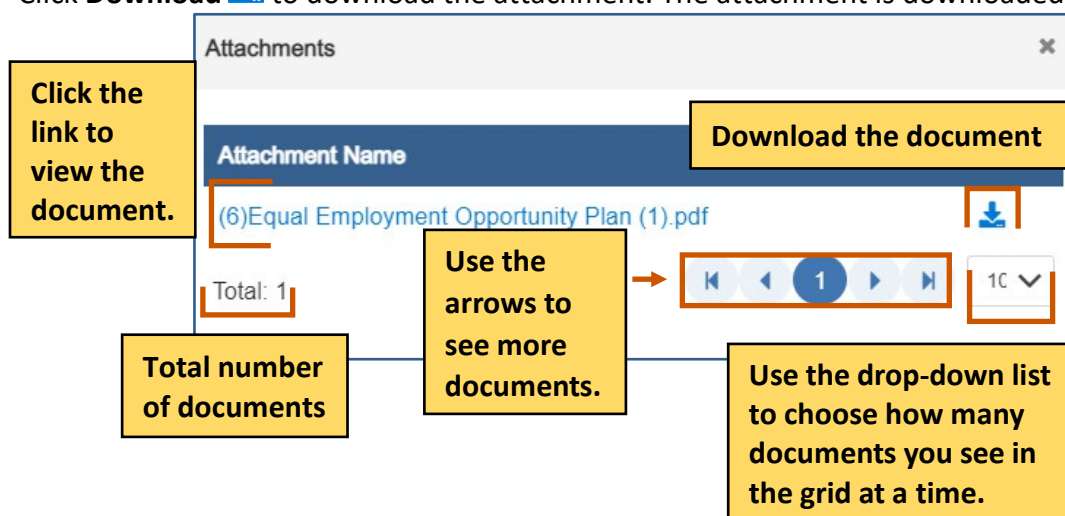Funding Announcement Name: Zebras Can Swim Across Streams

View Attachments associated with the Announcement

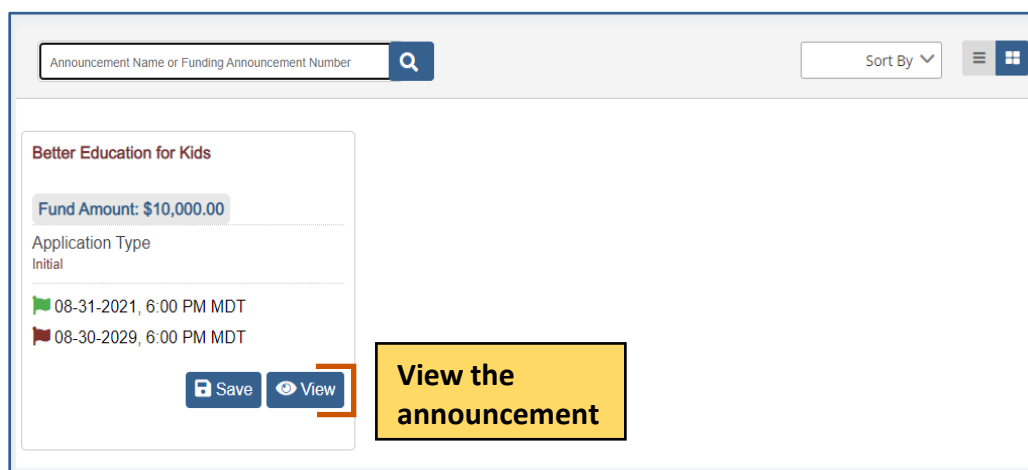1. Click **Attachments** 📕 **.** The Attachments dialog box appears.

⊗ Close	🖨 Print PDF	➥ Application Report	➥ Budget Report	➥ Objective Report	📕 Attachments

Better Education for Kids

2. Optional: Click the link to view the document.
   Or
   Click **Download** 📥 to download the attachment. The attachment is downloaded.

Attachments ✕

Click the link to view the document.

Attachment Name

Download the document

(6)Equal Employment Opportunity Plan (1).pdf 📥

Use the arrows to see more documents. ➡ |◀ ◀ ① ▶ ▶| 10 ⌄

Total: 1

Total number of 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.

   ⓘ **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 🔍	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

   💾 Save   👁 View   **View the announcement**

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

   ➡] Apply   ⊗ Close   🖨 Print PDF   📄 Attachments

   Better Education for Kids

   Funding Announcement Title: Better Education for Kids

   Funding Announcement Number:

   Announcement Type: Initial

   Open Date: Aug 31, 2021, 6:00 PM MDT

   Close Date: Aug 30, 2029, 6:00 PM MDT

   Announcement Narrative:

   It is important for kids to get a good education. They are the future of making the world a better place.

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

Application Details ×

Click to apply with a project.

+ Begin New Application

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

Total: 1

Use the arrows to see more projects.

⏮ ◀ 1 ▶ ⏭ 10 ⌄

Total number of projects

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

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	Resume	In Progress	09/07/2021	-- 🗑
Lakeside Community Project	App-21-97	Apply	Not Started	09/07/2021	-- 🗑

Total: 2

⏮ ◀ 1 ▶ ⏭ 10 ⌄

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.
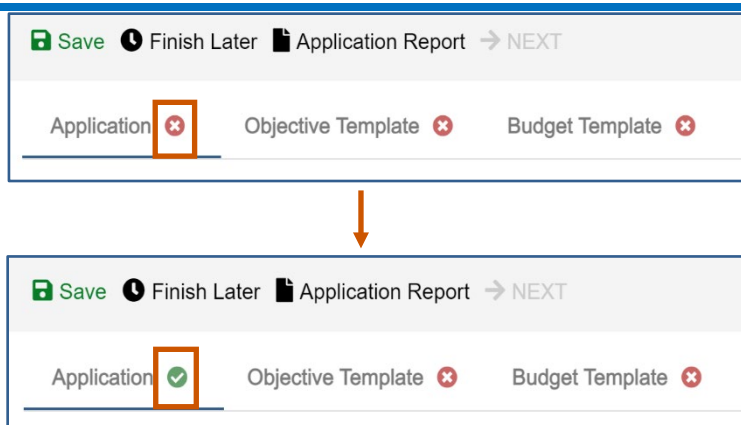
Application Questions:

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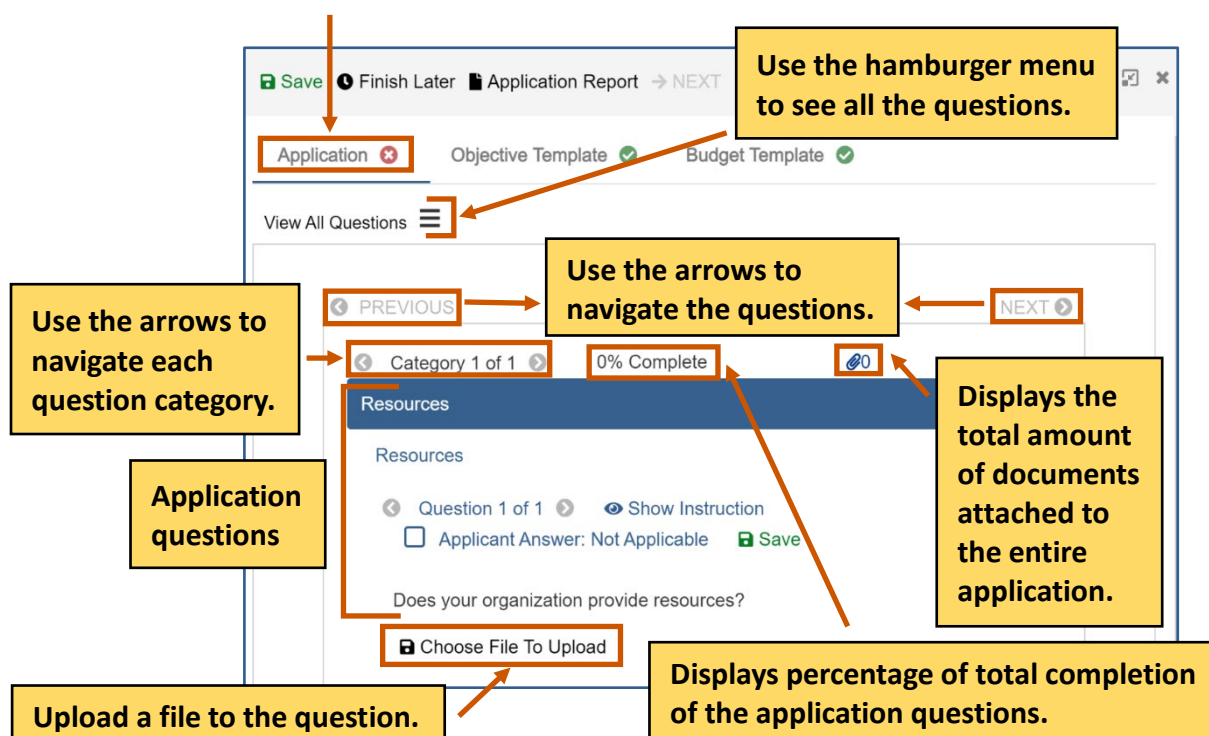
b. **Optional:** If the question requires you to attach a document, attach it to the question.

ⓘ **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.

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

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

b. Click Objective Instructions to see how to complete the template. The Objective Instructions dialog box appears.
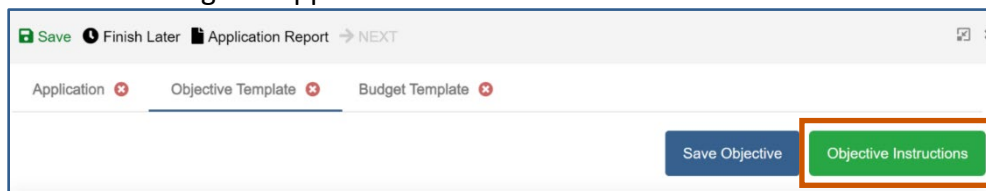
c. Click **Maximize** ⤢ to maximize the window.
Or
Click **Close** ✖ to close the dialog box.

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.
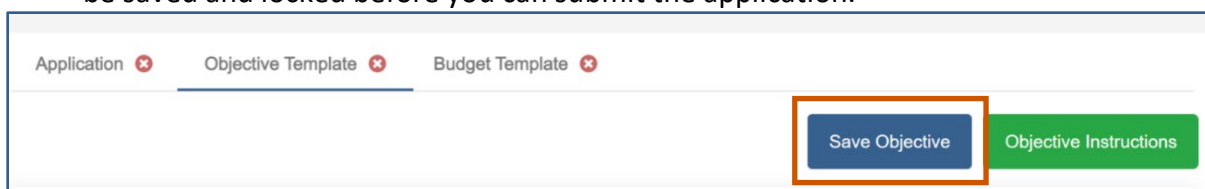
g. **Optional:** You can unlock the Objective Template again if you need to make change.
    i. Click **Return to Draft.** The Objective Template is locked, and you can edit it. You can go in and out of draft during the application process.
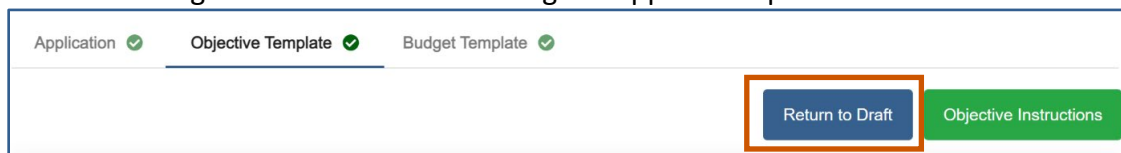
Complete the Budget template.
ⓘ **Note:** There are different design setups for the budget. The items you can add/change depend on the properties selected when the announcement was made. For more information, see Budget Tools.

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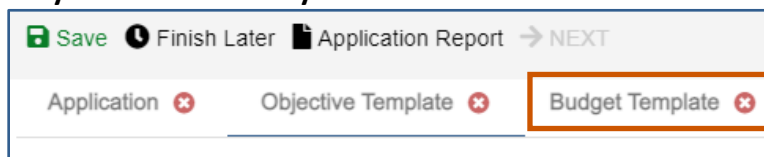
b. Use the budget tools to add, edit, and delete parent categories, sub-categories, or sub-sub-categories. For more information, see Budget Tools.
c. **Optional:** Single-click the green BN symbol next to a category to show budget calculations and the budget narrative.

DDS Applicants: Only enter values in the Direct Column

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

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.

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.

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.**

ⓘ

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

Review Questions   Save & 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

$ 500.00

Project Summary *

Project Summary

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

Type to Search Authorized Certifying Official 🔍 ✕ ✚

Project Director/Manager

Type to Search Project Director/Manager 🔍 ✕ ✚

Project Manager/Coordinator

Type to Search Project Manager/Coordinator 🔍 ✕ ✚

Compliance/Fiscal Officer

Type to Search Compliance/Fiscal Officer 🔍 ✕ ✚

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
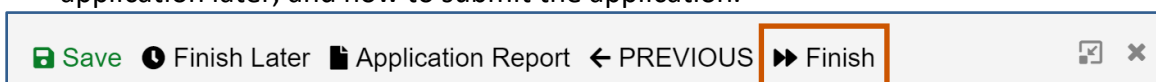
11. Click **Submit ▭.** A popup appears asking if you are sure you want to submit the application.
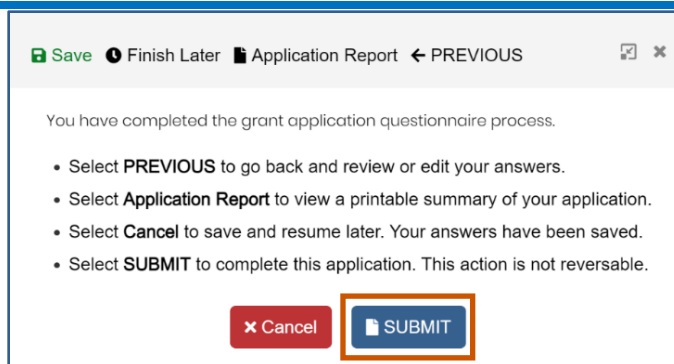
12. Click **Yes.** The application will be submitted.
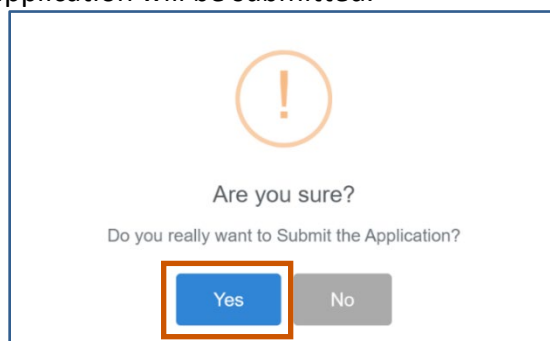
The Submit button turns into Processing with a spinning wheel. The Save button at the top also has a spinning wheel. Wait until the application has been submitted. There is a green checkmark next to the announcement indicating you have applied. A blue information popup also appears indicating that the application was submitted successfully.

My Application

You can view applications you have saved.

Choose the view display for the announcement

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

Use the search bar to choose an announcement.

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

Funding Announcement
Funding Amount
Newly Posted
Closing Soon

View the announcement

Use the Sort By drop-down list to sort 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.

Applicant

Riverside Community

📤 Funding Announcement
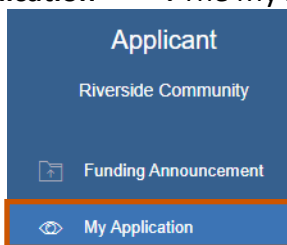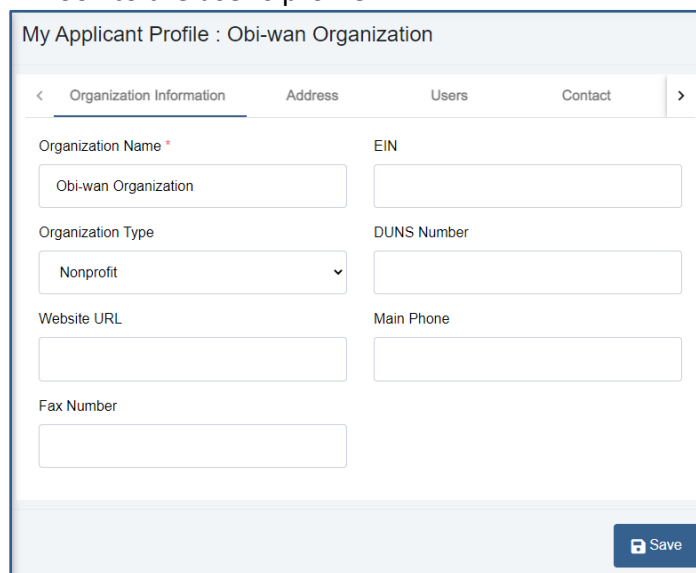
👁 My Application

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.

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

Remove the announcement to the My Application page.

✔ Application Removed Successfully

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.

1. From the site map, click **My Applicant Profile** 👁 . The Applicant Profile page appears.
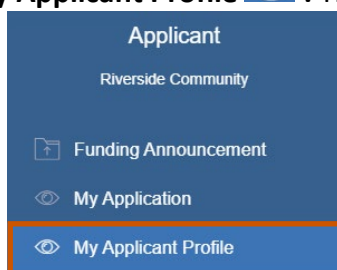
2. On the Organization Information tab, fill in the necessary fields.
    ℹ **Note:** The red asterisks indicate required fields. The Address, Users, Contact, Documents, and Award Status tabs appear only after you save the organization information. Make sure to save each tab information as you go.

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

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.

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My Applicant Profile : Obi-wan Organization

Organization Information   Address   **Users**   Contact   Documents   Award Status

Click the link to view the user.

+ New

Add a user

☐	Full Name	Organization Name	Job Title	Phone Number	Email
☐	Test Contact	Obi-wan Organization	Project Manager	13037896789	tcontact@applicant.com

Total: 1

Total number of users

Use the arrows to see more users.

|◄ ◄ **1** ► ►| 10 ˅

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

🖫 Save

Save the user

b. 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 *
[   ]

Job Title
[   ]

Email Address *
[   ]

Phone Number
[   ]

User Name *
[   ]
This field is required.

Password *
[   ]

Password (repeat) *
[   ]

• Passwords do not match!

Cancel   🖫 Save

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.

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Create New User   ✕

User Information   Address

Address Line 1   Address Line 2   City

County   State/Province/Region Country
                                            --Select Country--

Postal Code

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.

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

Click the link to view the contact.

My Applicant Profile : Obi-wan Organization

Organization Information   Address   Users   Contact   Documents   Award Status

＋ New   ⟵   **Add a contact**

	Full Name	Organization Name	Job Title	Phone Number	Email
	Test Contact	Obi-wan Organization	Project Manager	13037896789	tcontact@applicant.com

Total: 1

Total number of contacts

Use the arrows to see more contacts.   ⟶   ⏮ ◀ 1 ▶ ⏭   10 ▾

🖫 Save

Save the contact

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

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.

Save the contact to the grid.

ⓘ Saved Successfully.

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

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.

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

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.

Contact

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

|◀ ◀ **1** ▶ ▶| 10 ⌄

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

|◀ ◀ **1** ▶ ▶| 10 ⌄

Save the applicant profile.

🖫 Save

ⓘ Saved Successfully.

Users

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

+ New — Create a user

Users

Use the search bar to search users.

Search... 🔍

Choose a user from the grid.

	Name	Email	Organization Unit	Active
☐	Test Contact	tcontact@applicant.com	Riverside Community	✅
☐	Mickey Mouse	mmouse@applicant.com	Riverside Community	✅

Total: 2

Total number of users

Use the arrows to see more users. ⏮ ◀ 1 ▶ ⏭ 10 ⌄

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

Active Users

You can view active users.

+ New — Add a user

Users

Use the search bar to choose a user.

Search... 🔍

	Name	Email	Organization Unit	Active
☐	Test Contact	tcontact@applicant.com	Obi-wan Organization	✅

Total: 1

Total amount of users

Use the arrows to navigate users. ⏮ ◀ 1 ▶ ⏭ 10 ⌄

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

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

👥 Users ⌄
📄 Active
🛒 Inactive
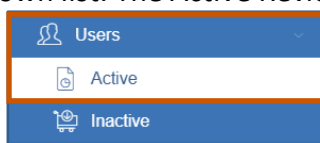
## Create a User

You complete this action from both the Active Users and Inactive Users options from the sitemap.
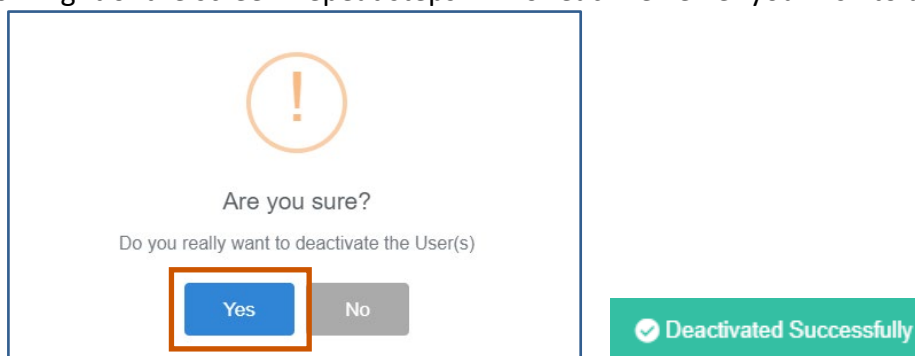
1. From the site map, click **Users** 👥 and choose **Active** 📄 or **Inactive** 🛒 . The Users for Applicant page appears.

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

   Create a user.
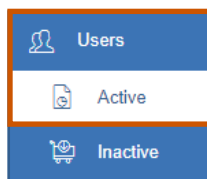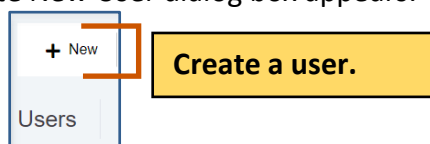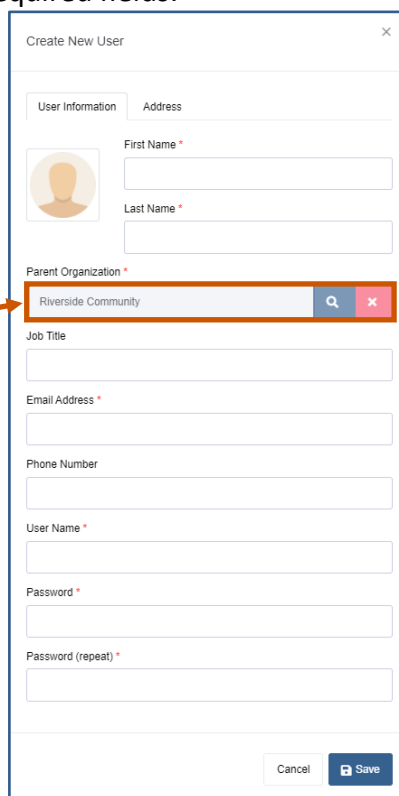
   Under the Active column:

   - ❌ 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.

   Use the command to add or search for a parent organization. The default is the organization you are viewing.

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

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Note: The red asterisks indicate required fields.

5. Click **Save** [icon] 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.

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

4. Click **Save** [icon]. 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.
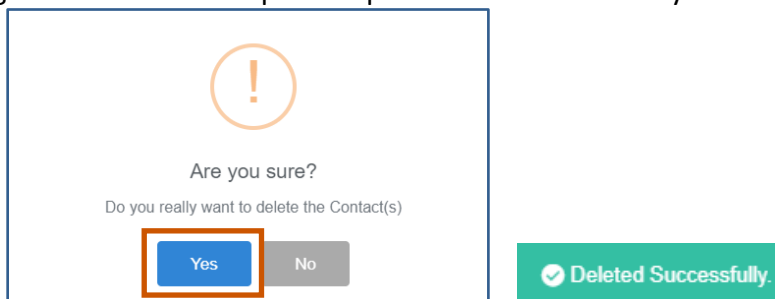
Activate a User

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.

3. Click **Activate ✔**. A message popup asks if you are sure you want to activate the user.
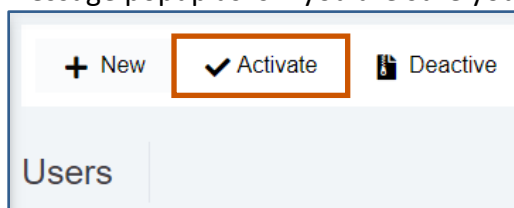
4. Click **Yes.** The user is deactivated. A green Activated Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each user you wish to deactivate.
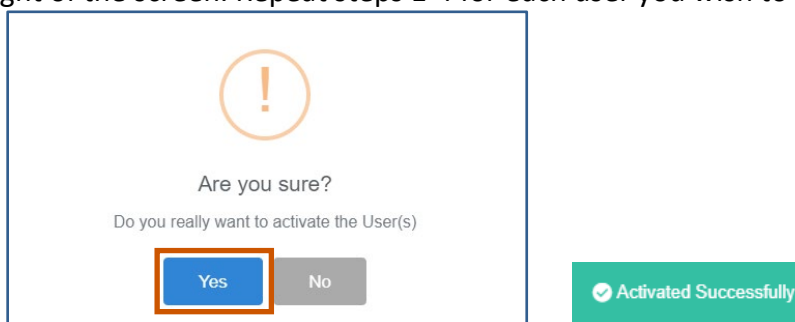
Deactivate a User

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.
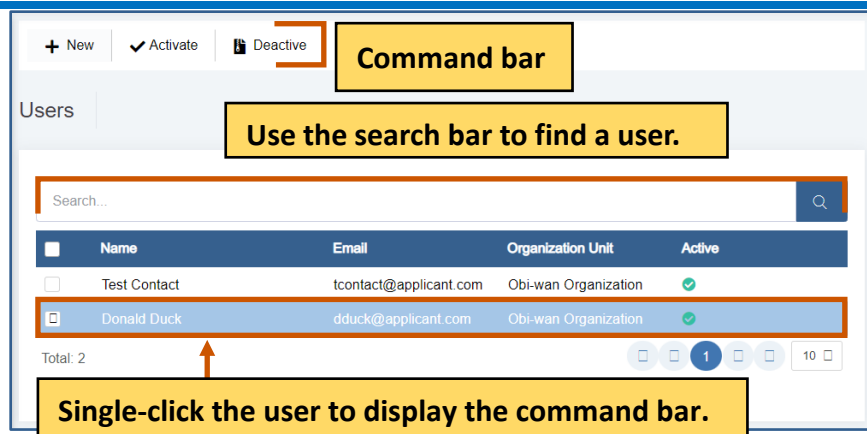
3. Click **Deactivate** . A message popup asks if you are sure you want to deactivate the user.
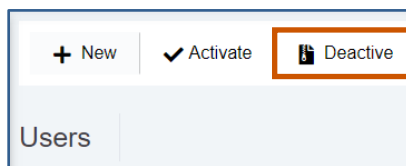
4. Click **Yes.** The reviewer is deactivated. A green Activated Successfully popup appears at the bottom right of the screen.Repeat steps 1-4 for each reviewer you wish to deactivate.

Inactive Users

You can view inactive review panels.

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.

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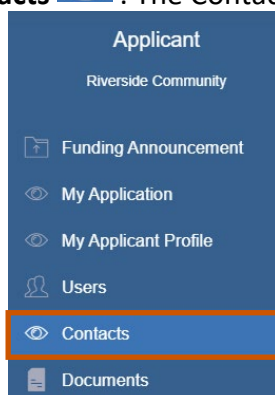
2. Click **New ➕.** The Create New Contact dialog box appears.

Create a contact.

Contacts

Choose a contact from the grid.

	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.com

Total: 2

Use the arrows to see more contacts.

Total number of contacts

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

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.

Double-click the contact to edit it.

2. 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.

Delete a Contact

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

Click the radio button next to the name of contact to display the command bar.
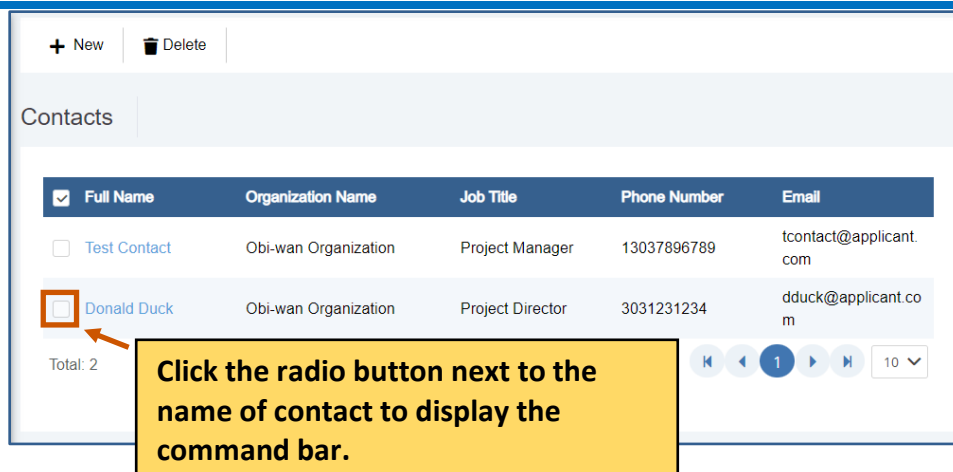
2. Click **Delete** 🗑. A message popup asks if you are sure you want to delete the contact.
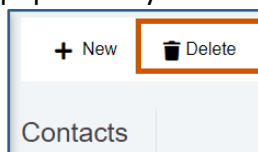
3. Click **Yes.** The contact is deleted. A green Deleted Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each contact you wish to delete.

Documents

View documents related to the application.

Command bar

Choose a contact from the grid.

Total number of documents

Use the arrows to see more documents.

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

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.
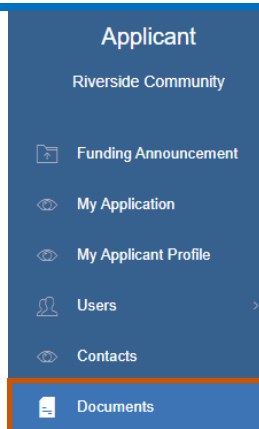
2. Click **Choose File** ⬛ .
3. Upload the file.
4. Click **Save** 💾 . The file appears in the grid.
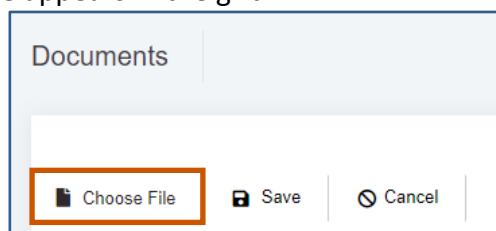
Delete a Document

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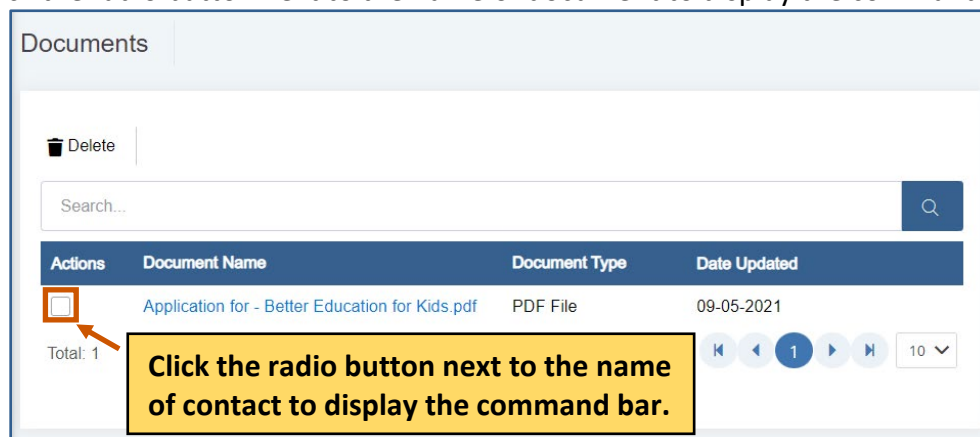
Click the radio button next to the name of contact to display the command bar.

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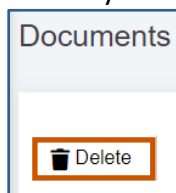
Documents

🗑 Delete

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.

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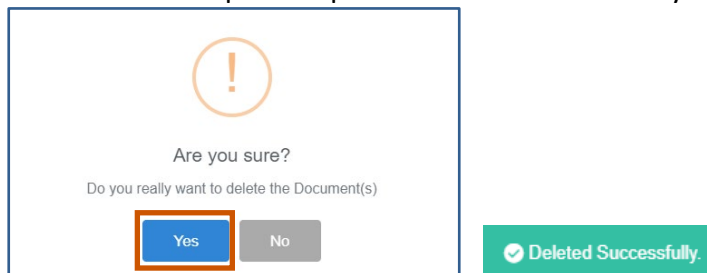
Budget Tools

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.**

> **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.**

> **Displays the budget category**

> **Displays the budget narrative about the specific budget category**

This is a budget narrative example.

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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.

Budget tools
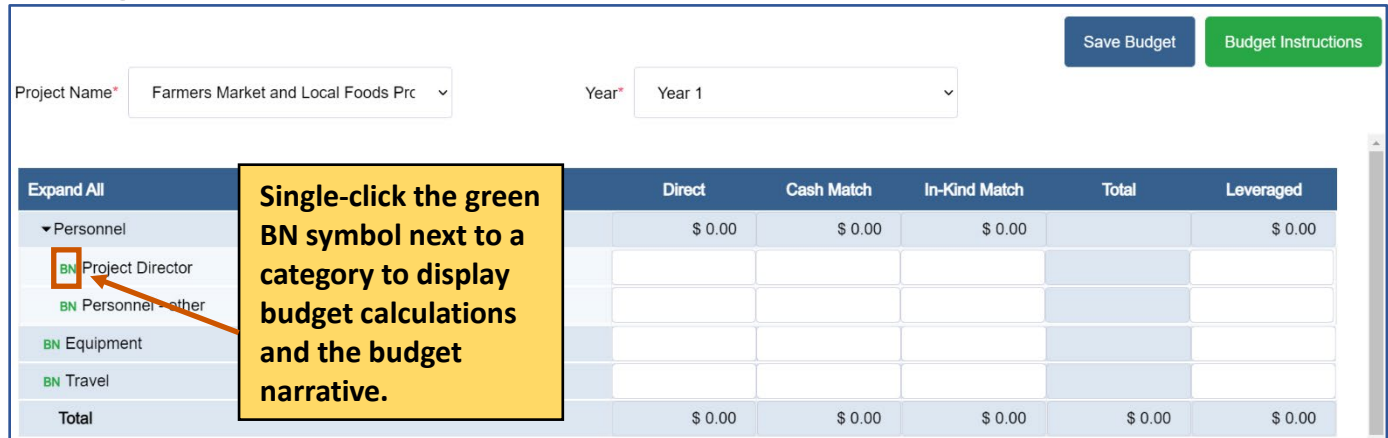
Type in amount in cells that are white.

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

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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.
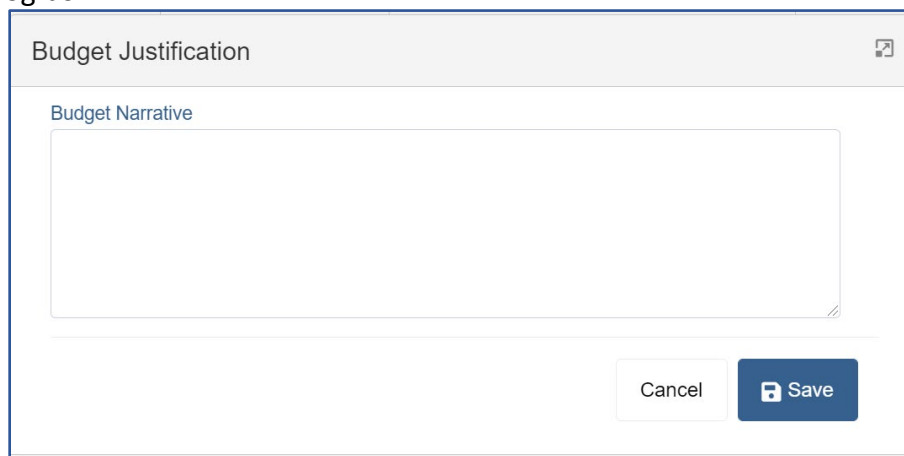
2. Add the appropriate information.

Example dialog box:
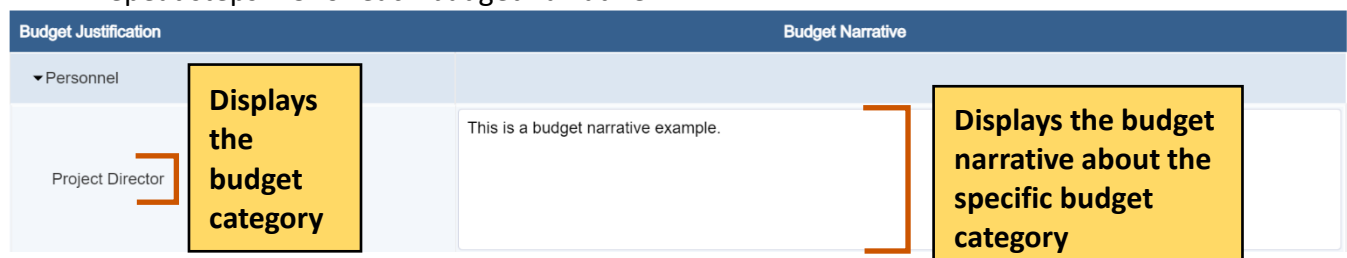
3. Click **Save** 💾 . The budget narrative appears in the table at the bottom of the page. Repeat steps 1-3 for each budget narrative.

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

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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				$ 0.00	$ 0.00	$ 0.00	$ 0.00

Add a parent category.

New Parent Category

New Sub-Category

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

Budget Categories

BN Fringe ↑ ↓ ✎ + 🗑

Type the name of 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

Fringe   💾 ✕

Type the new name of the parent category.

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.

Expand All

▼ Personnel

▶ Project Director   ✎ + 🗑

Click the blue arrow to expand the list.

Delete the parent category.

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3. Click **Yes.** The parent category is deleted.
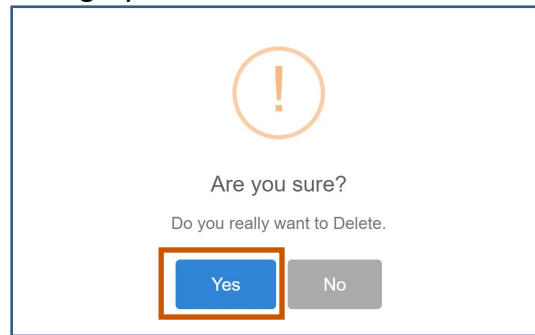
Move a Parent Category Up or Down on the Grid

1. Hover over a parent category to display the budget tools.
2. 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

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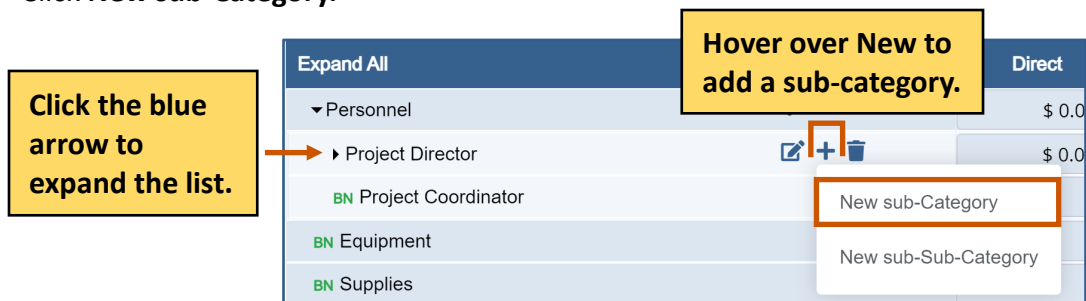
5. Type in the name of the sub-category.
6. Click **Save** 💾 **.** The sub-category is added to the grid.
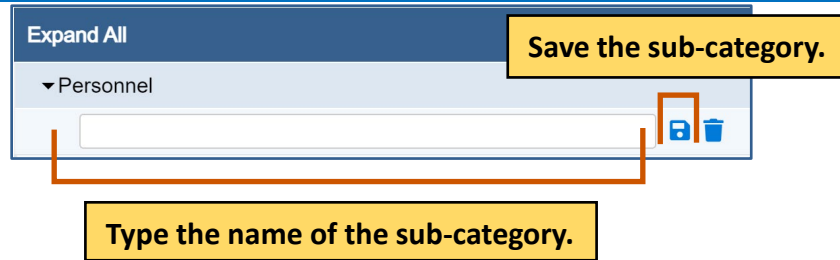
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Expand All

▾ Personnel

Save the sub-category.

Type the name of the sub-category.

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** .

Click the blue arrow to expand the list.

Expand All

▾ Personnel

▸ Project Director

Click Edit to type in a new name for the sub-category.

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

Expand All

▾ Personnel

Project Director

Save the sub-category.

Type the name of the sub-category.
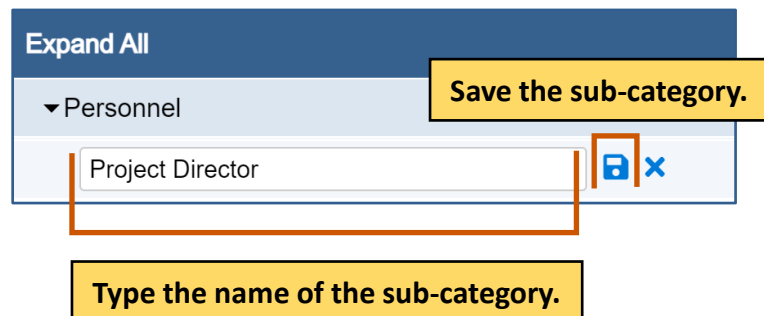
Deleting a Sub-Category

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 sub-category.

Click the blue arrow to expand the list.

Expand All

▾ Personnel

▸ Project Director

Delete the sub-category.

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

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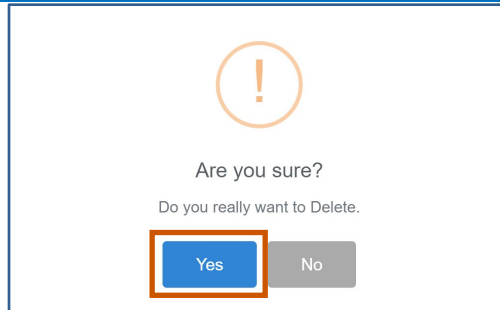
Move a Sub-Category Up or Down on the Grid

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.
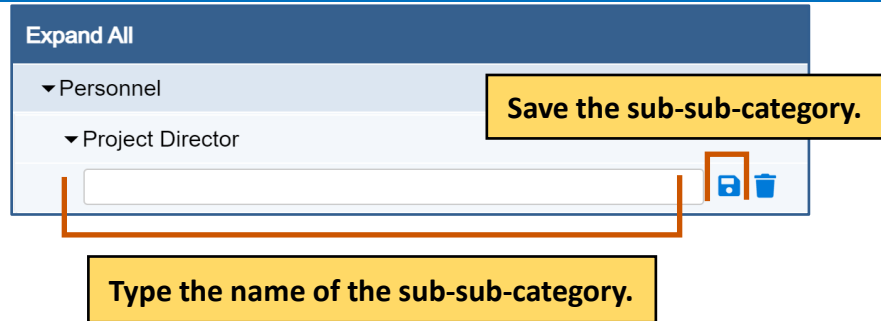
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Expand All
- ▼ Personnel
  - ▼ Project Director

> Save the sub-sub-category.

> Type the name of the sub-sub-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** 📝.

> Click the blue arrow to expand the list.

> Click Edit to type in a new name for the sub-sub-category.

Expand All
- ▼ Personnel
  - ▼ Project Director
    - BN test

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

> Save the sub-sub-category.

Expand All
- ▼ Personnel
  - ▼ Project Director
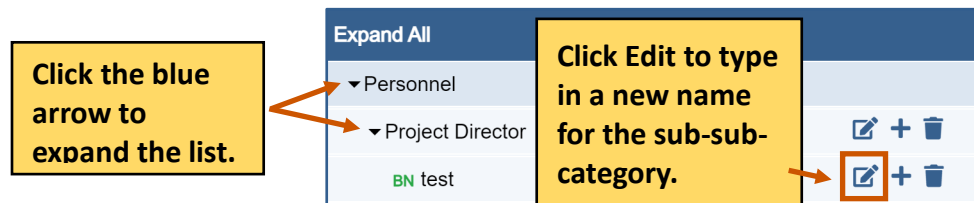
> Type the name of the sub-sub-category.
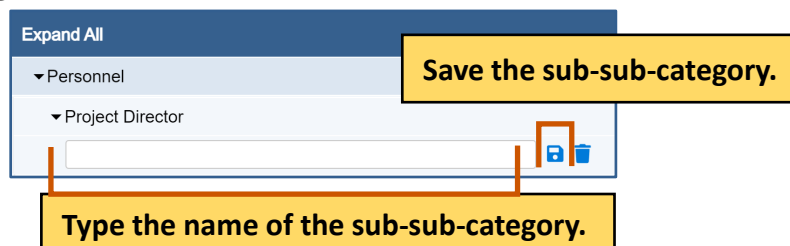
Deleting a Sub-Sub-Category

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-sub-category.

> Click the blue arrow to expand the list.

> Delete to the sub-sub-category.

Expand All
- ▼ Personnel
  - ▼ Project Director
    - BN test
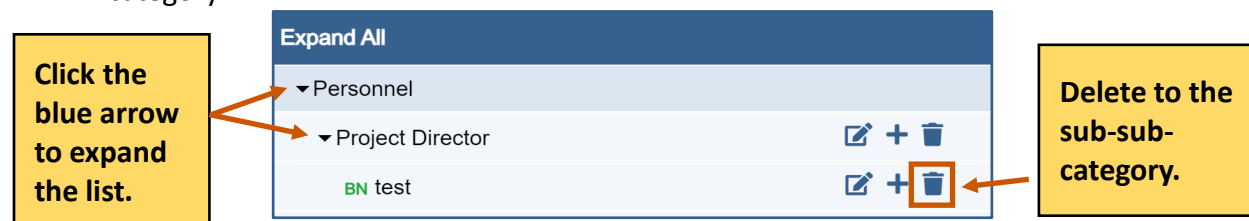
4. Click **Yes.** The sub-category is deleted.
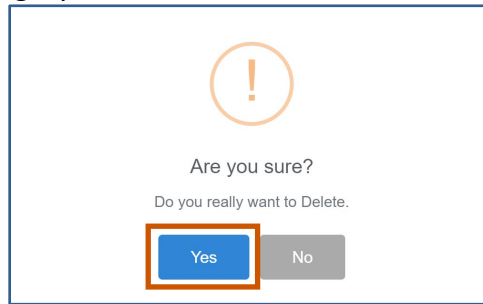
Move a Sub-Sub-Category Up or Down on the Grid

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.

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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.**

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.

GrantVantage®

Adding an Objective

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

> **Use the arrow to display the objectives.**

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

Fill in the necessary fields.

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

> **Save the new objective**

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

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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.

4. Fill In the necessary fields.
   ⓘ **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.

GrantVantage®

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 display the objectives.

Add a grant activity.

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.

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 display the objectives.

Edit the objective.

5. Edit the necessary fields.
   ⓘ **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.

Save the changes to the objective.

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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.

6. Edit the necessary fields.
   ⓘ **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.

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Performance Measure

Measure Description *

Type of Measure *

Number

Manager *

--Select Manager--

Start Date *

End Date *

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

Reference ID

Planned *

Actual

Execution *

Results

(Actual Amount entered manually by the user)

Cancel   💾 Save

Save the changes to the performance measure.

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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.
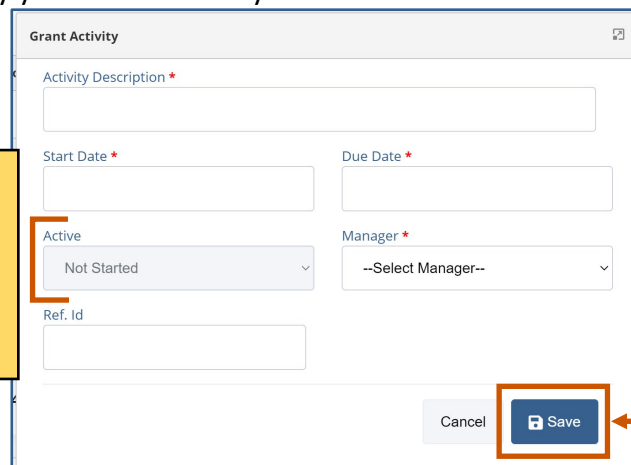
Use the arrow to display the objectives.

		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	⬛ 🗑
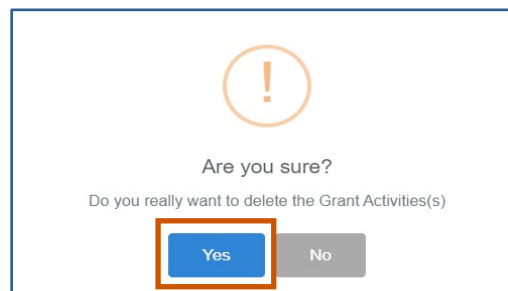
❯ Performance Measure (1)   + Add Measure

Edit the grant activity.

⌄ Grant Activities (1)   + Add Activity

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

6. Edit the necessary fields.
   ⓘ **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 *

Start Date *   Due Date *

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

Active   Manager *
Not Started   --Select Manager--

Ref. Id

Save the changes to the grant activity.

Cancel   💾 Save

![GrantVantage logo]

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.
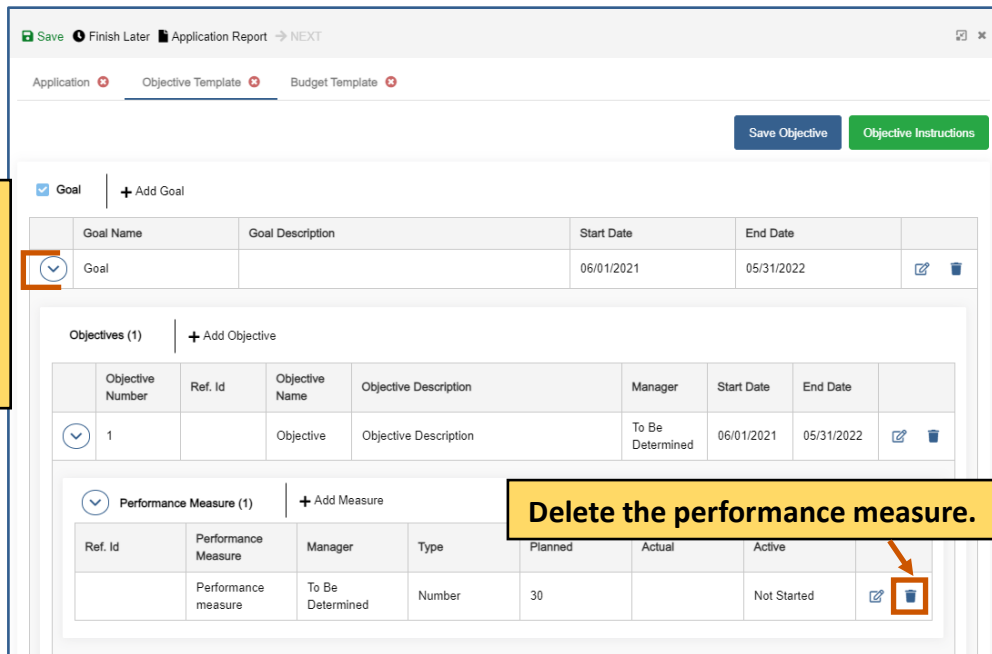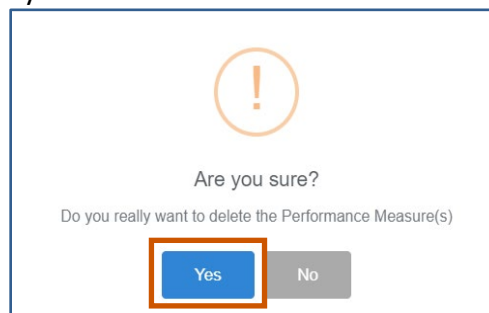

> **Use the arrow to display the objectives.**

> **Delete the objective.**

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

![GrantVantage®]

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.

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.

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