

GrantVantage[®]



ATTACHMENT A

DDS Applicant Instructions

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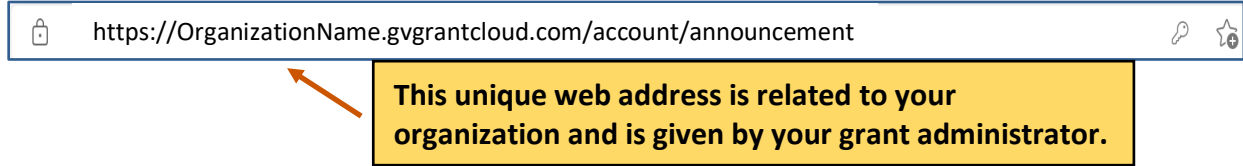
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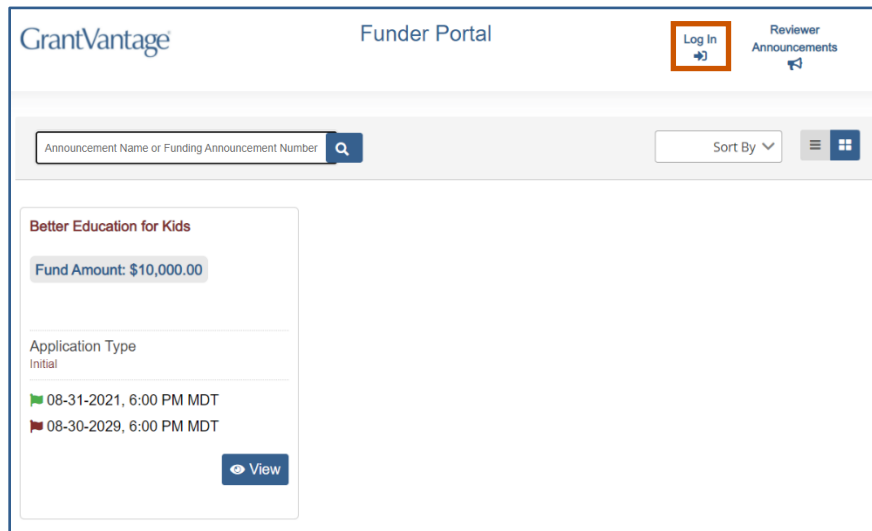
Deleting a Grant Activity..... 67

Login

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

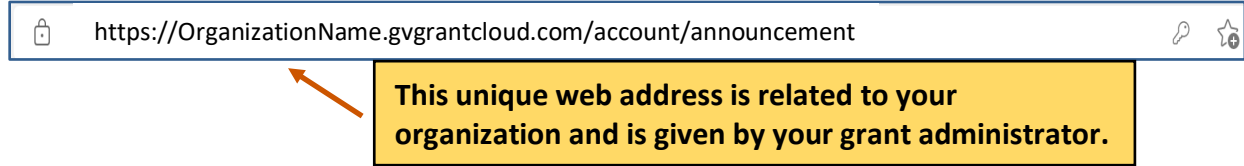



3. Click **Log In** . The Log In screen appears. From the Log In screen, returning applicant users may login to the system. New applicants must create a new applicant user account.

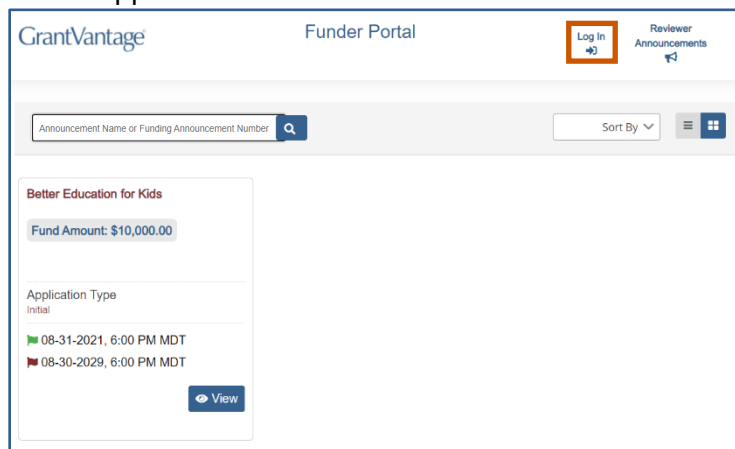


Register

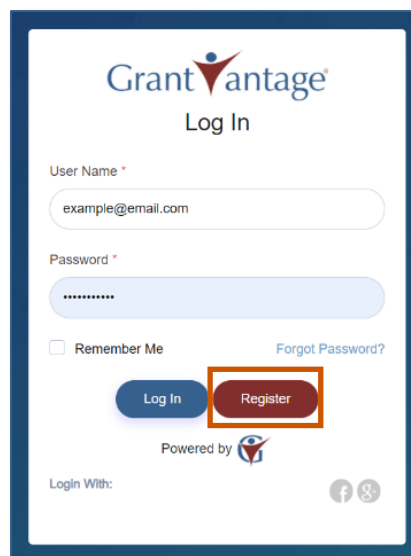
1. Open preferred web browser.
2. In the URL field of the web browser, enter the web address provided by GrantVantage. The public-facing view of the Funder Portal screen appears.





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



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



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

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

Applicant Registration


This field is required.

This field is required.

This field is required.

- Passwords do not match!

Please prove you are not a robot

 I'm not a robot 
reCAPTCHA
Privacy - Terms





Homepage













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

The screenshot shows the GrantVantage homepage interface. A sidebar on the left contains a 'Site map' with options: Funding Announcement, My Application, My Applicant Profile, Users, Contacts, and Documents. The main content area features a search bar at the top, a 'Sort By' dropdown menu, and a list of funding announcements. One announcement, 'Better Education for Kids', is highlighted with a callout box. Below the announcement list are 'Save' and 'View' buttons. A 'Save the announcement to the My Application section of the site map or view the announcement' callout points to these buttons. Other callouts include: 'Use the search bar to choose an announcement.' pointing to the search bar; 'Choose the view display for the announcement' pointing to the 'Sort By' dropdown; 'Displays the basic announcement information' pointing to the details of the highlighted announcement; and 'Use the Sort By drop-down list to sort the announcement' pointing to the dropdown menu.

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		Displays all published announcements.
 My Application		Displays all the announcements you have saved and/or applied to.

<p>Applicant</p> <p>Kings County</p>	<p>Site Map Options</p>	<p>Description</p>
<ul style="list-style-type: none">  Funding Announcement  My Application  My Applicant Profile 	<p>My Applicant Profile</p> 	<p>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.</p>
<ul style="list-style-type: none">  Users  Active  Inactive 	<p>Users</p> 	<p>View the users related to the application. You can view active or inactive users.</p>
<ul style="list-style-type: none">  Contacts  Documents 	<p>Contacts</p> 	<p>View the contacts related to the application.</p>
	<p>Documents</p> 	<p>View documents related to the application.</p>

Funding Announcement

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

The screenshot shows a web interface for viewing funding announcements. A search bar at the top allows users to search by announcement name or number. Below the search bar, a card displays details for a 'Better Education for Kids' announcement, including a fund amount of \$10,000.00, application type 'Initial', and two closing dates: 08-31-2021 and 08-30-2029. A 'Save' button is highlighted with an arrow pointing to a callout box. To the right, a 'Sort By' dropdown menu is open, showing options like 'Funding Announcement', 'Funding Amount', 'Newly Posted', and 'Closing Soon'. A 'View' button is also visible next to the 'Save' button.

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

Use the search bar to choose an announcement.

Choose the view display for the announcement

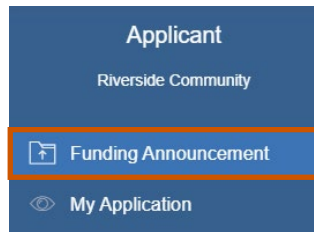
Use the Sort By drop-down list to sort the announcement.


View the announcement

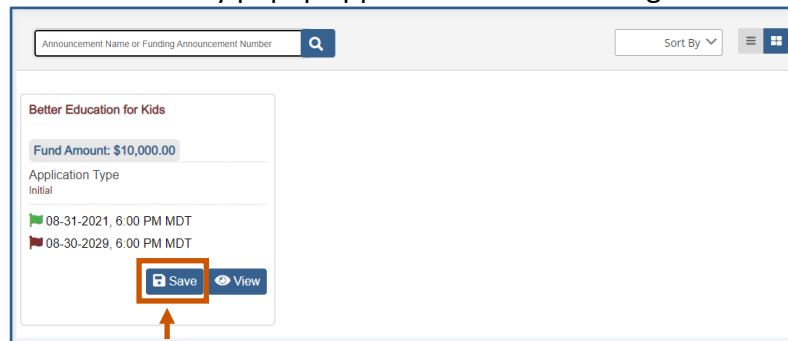
Save the announcement to the My Application page.

Save an Announcement

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



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

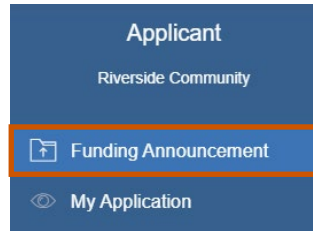



Save the announcement to the My Application page.

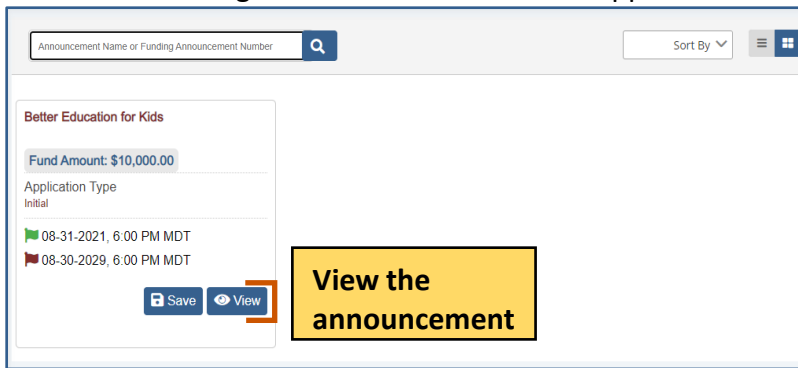
 Application Saved Successfully

View an Announcement

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







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







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

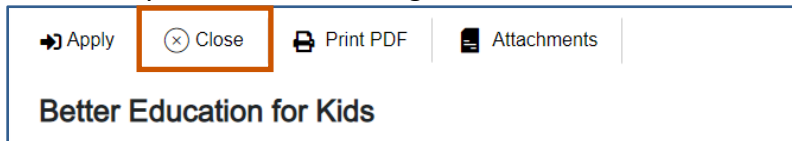


Announcement Command Bar		Descriptions
Apply		Apply to an announcement.
Close		Close the announcement details.
Print PDF		Print the announcement details as a PDF.

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

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

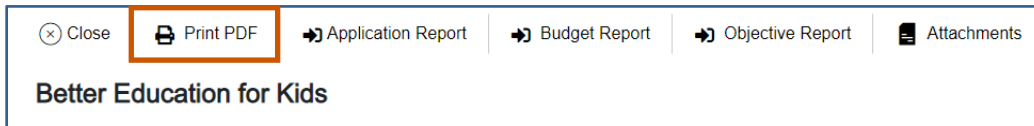
4. Click **Close**  when you are done viewing the announcement details.



Print the Announcement as a PDF


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

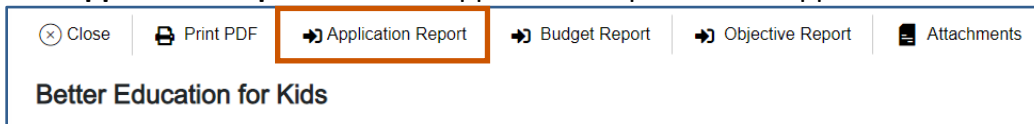
1. Click **Print PDF** . The announcement details download as a PDF.




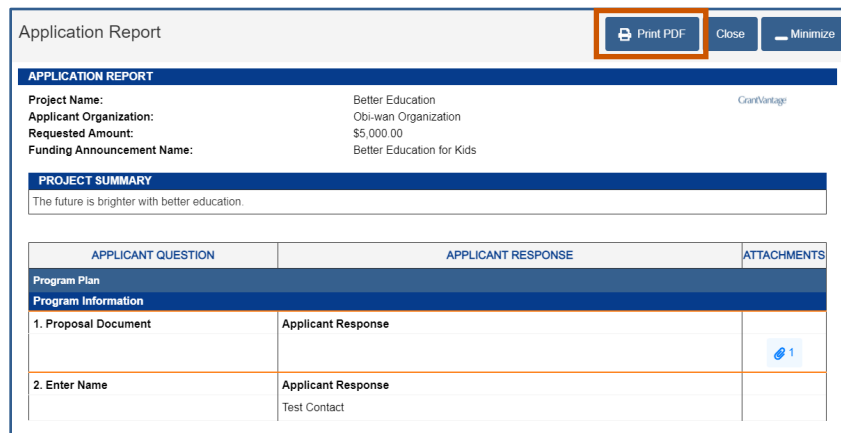
View the Applicant Report

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.




Application Report Print PDF Close Minimize

APPLICATION REPORT

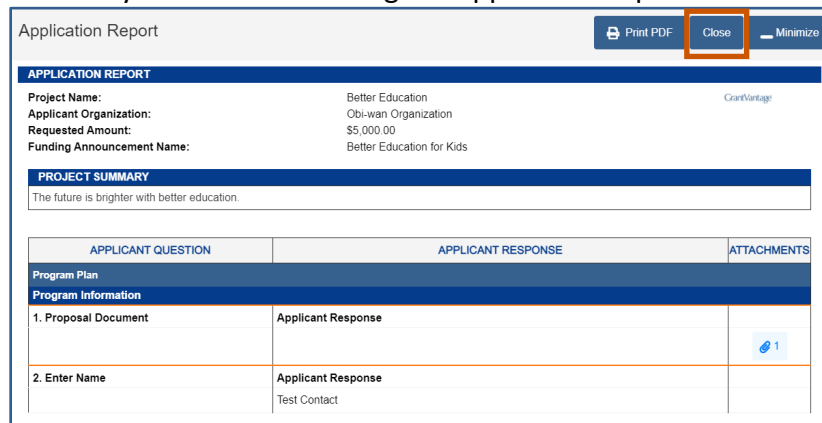
Project Name: Better Education GrantVantage
 Applicant Organization: Obi-wan Organization
 Requested Amount: \$5,000.00
 Funding Announcement Name: Better Education for Kids

PROJECT SUMMARY

The future is brighter with better education.

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

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




Application Report Print PDF Close Minimize

APPLICATION REPORT

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

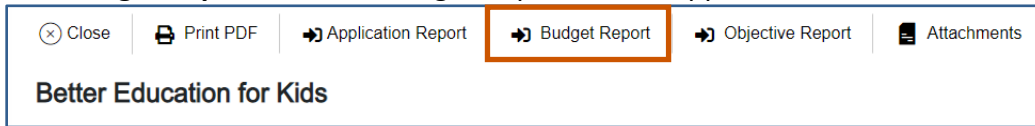
PROJECT SUMMARY

The future is brighter with better education.

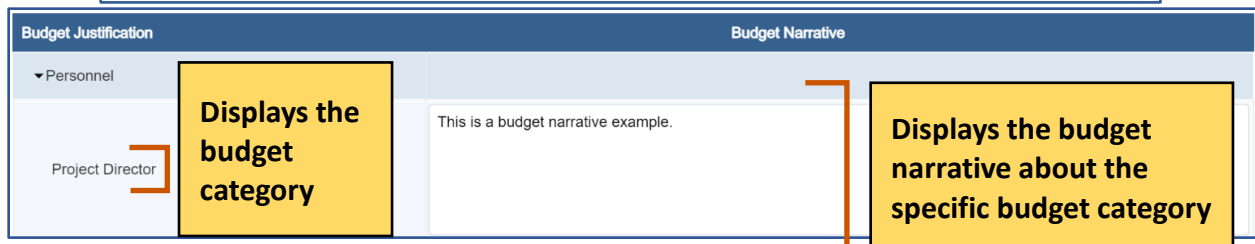
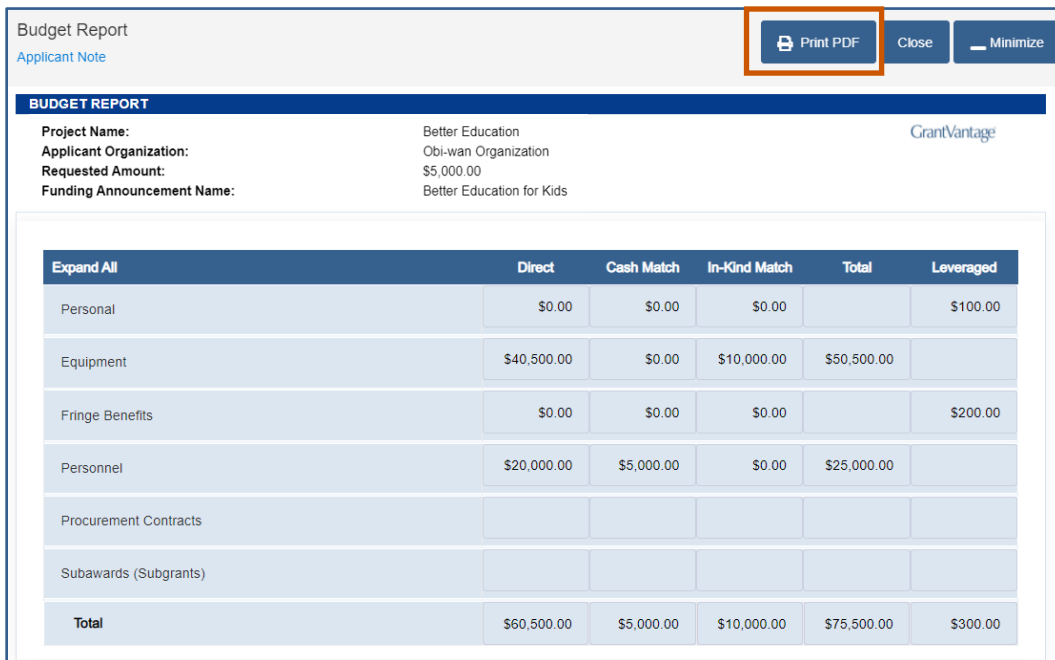
APPLICANT QUESTION	APPLICANT RESPONSE	ATTACHMENTS
Program Plan		
Program Information		
1. Proposal Document	Applicant Response	 1
2. Enter Name	Applicant Response Test Contact	

View the Budget Report

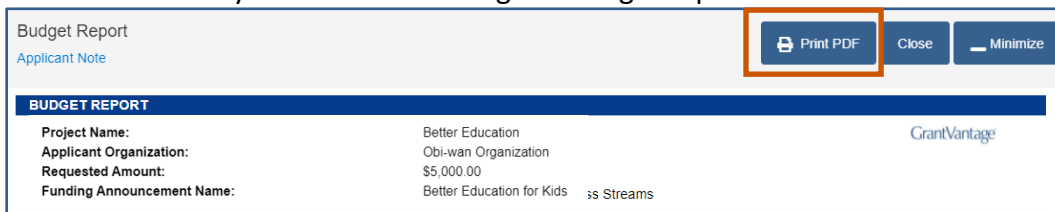
1. Click **Budget Report** . The Budget Report screen appears.



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

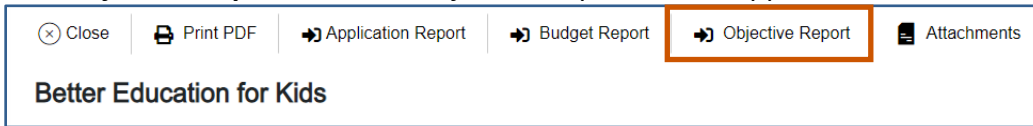


3. Click **Close** when you are done viewing the budget report.



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.

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

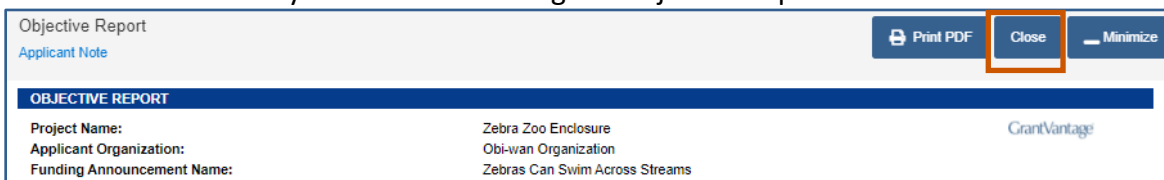
Performance Measure (4)

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)

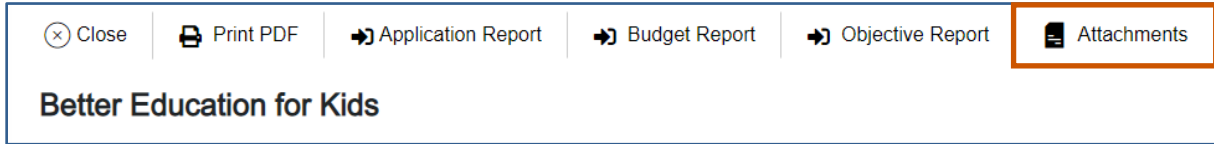
Ref. Id	Grant Activities	Manager	Start	Due Date	Active
8.1	8.1: Conducting onsite reorientations in index testing and strengthening PITC and use of Screening tool in supported sites	Test Contact	10/01/2020	10/13/2020	Not Started
8.2	8.2: Conduct District Supportive Supervision	Test Contact	10/01/2020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

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



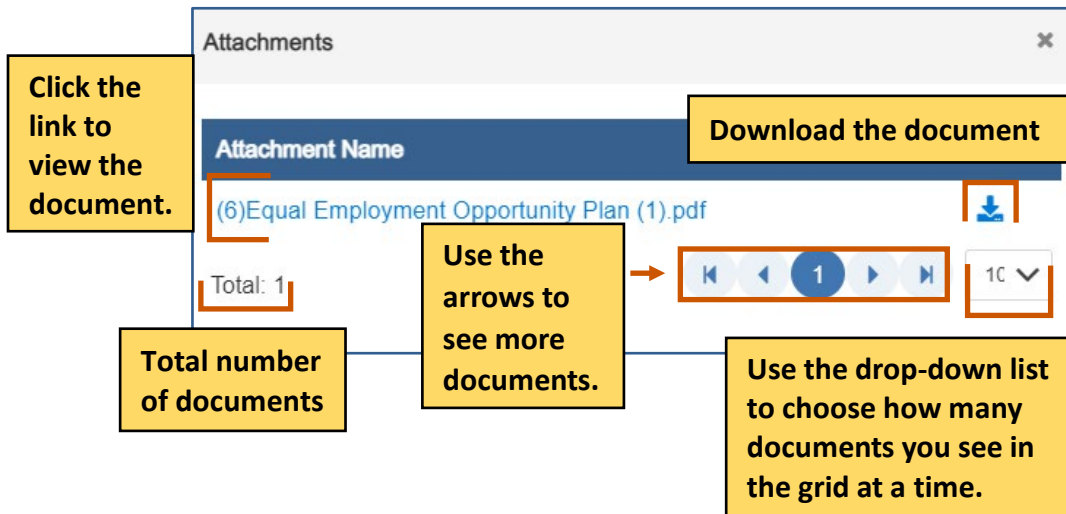
View Attachments associated with the Announcement

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




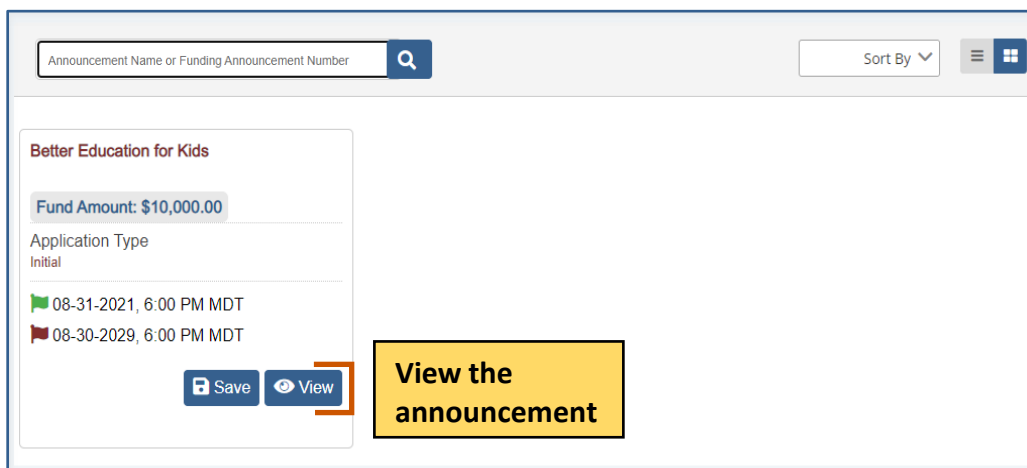
2. Optional: Click the link to view the document.
Or

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

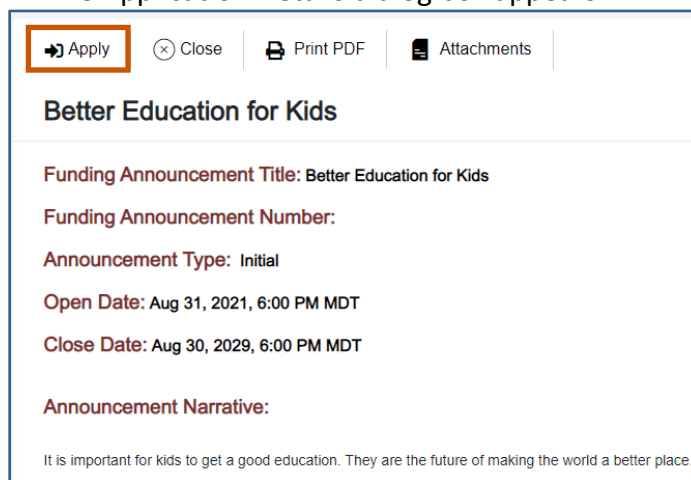


Submitting Applications to a Funding Announcement

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



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



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

Application Details

+ 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.

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

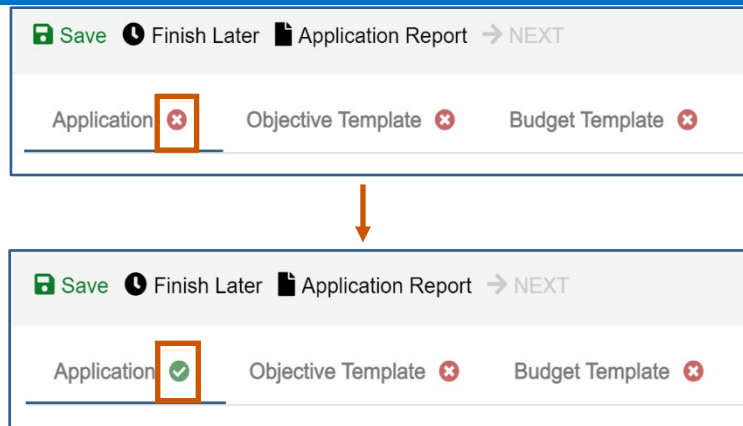
+ Begin New Application

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

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.

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.

Use the hamburger menu to see all the questions.

Use the arrows to navigate the questions.

Use the arrows to navigate each question category.

Application questions

Displays the total amount of documents attached to the entire application.

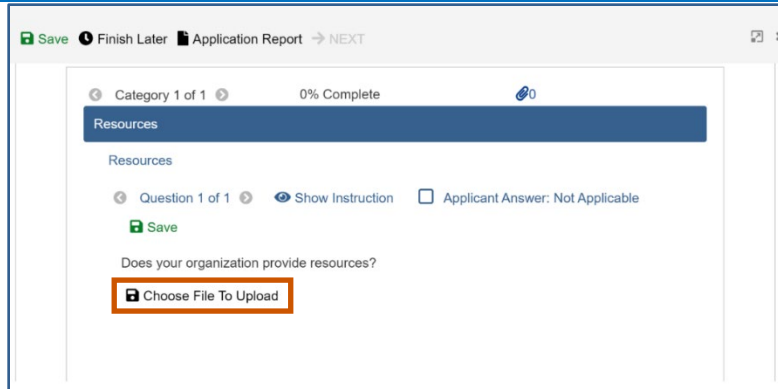
Upload a file to the question.


Displays percentage of total completion of the application questions.


- 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.



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

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

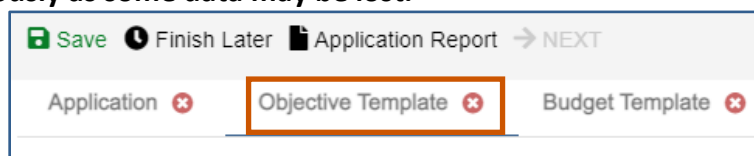
- iii. Click **Save**.

The screenshot shows a 'Documents' window with a table of uploaded files. The table has columns for 'Document Name' and 'Date Uploaded'. Two files are listed: 'Example.docx' (05-18-2021) and 'Example 2.docx'. Below the table, there is a 'Total: 2' indicator, a 'Choose File' button, a 'Save' button, and a 'Cancel' button. A pagination control shows '1' of 10 documents. A 'Close' button and a 'Save' button are at the bottom right. Several yellow callout boxes provide instructions: 'Use the picklist to choose a document you wish to upload.' (pointing to the document list), 'Total number of documents' (pointing to 'Total: 2'), 'Save the new document.' (pointing to the 'Save' button), 'Use the drop-down list to choose how many documents you see in the grid at a time.' (pointing to the '10' dropdown), 'Upload a new document.' (pointing to the 'Choose File' button), 'Use the arrows to see more documents.' (pointing to the pagination arrows), and 'Save the document(s)' (pointing to the 'Save' button).

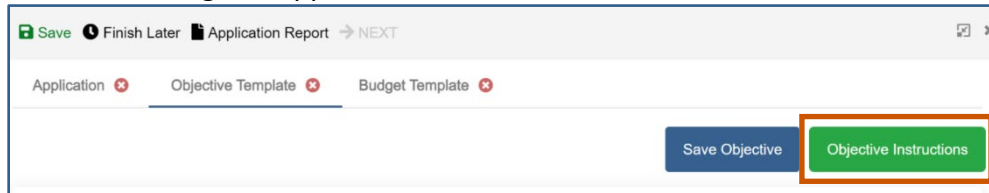
Complete the Objective Template:



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

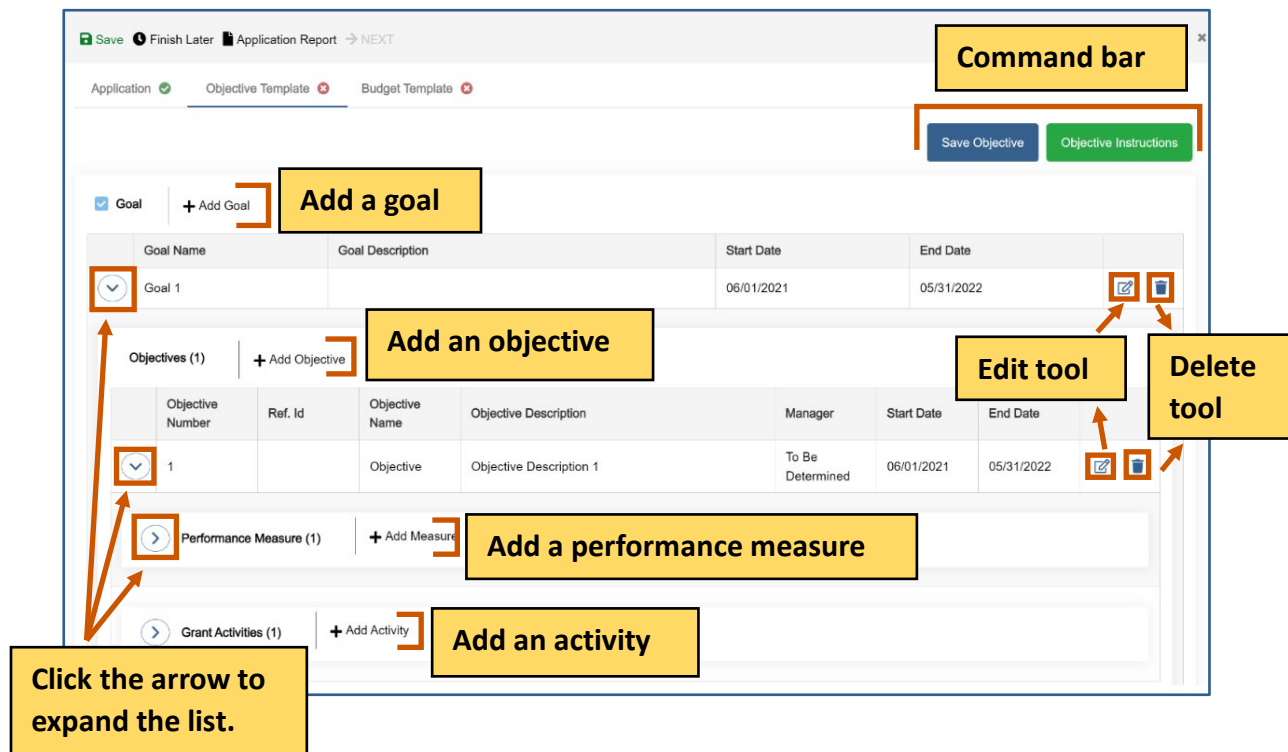
i **Note: Applications do not utilize live updates. Multiple users should not attempt to modify or save the same Question Answer, Objective Template, or Budget Template simultaneously as some data may be lost.**



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

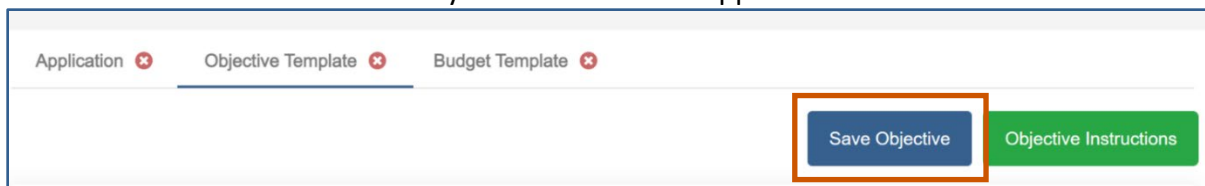


- c. Click **Maximize**  to maximize the window.
Or
Click **Close**  to close the dialog box.
- d. Add in the goals if necessary. If goals are required, each objective must be associated with a goal.
Note: The Goal radio button only appears if the option has been selected when the announcement was made.
- e. Add in the objectives, performance measures, and grant activities.
Note: The performance measures and grant activities must be associated with an objective. For more information on how to add, edit, or delete a goal, objective, performance measure, or grant activity, see [Objective Tools](#).

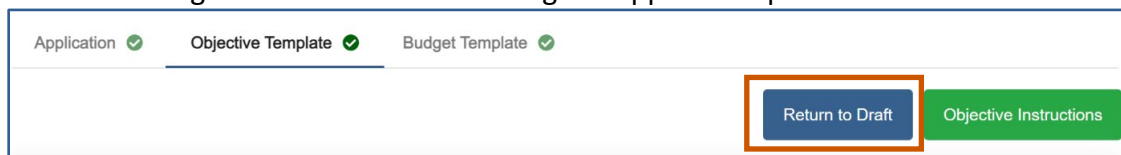


Objective Template Command Bar	Description
Save Objective	Saves the objectives and locks the Objective Template.
Objective Instructions	Display the instructions on how to complete the Objective Template.

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



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

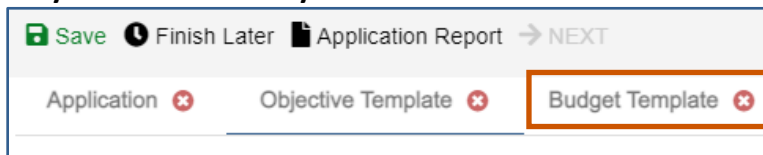


Complete the Budget template.

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

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

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



- b. Use the budget tools to add, edit, 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.

Project Name* Farmers Market and Local Foods Proc Year* Year 1

Save Budget Budget Instructions

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

Budget tools

Type in amount in cells that are white.

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

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

Application ✖ Objective Template ✖ Budget Template ✖

Save Budget Budget Instructions

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

Application ✔ Objective Template ✔ Budget Template ✔

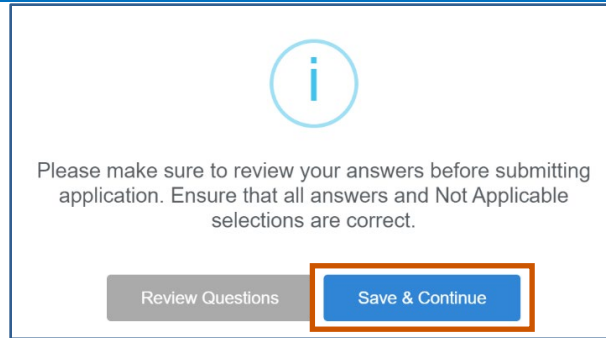
Return to Draft Budget Instructions

Finish the application process

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

Save Finish Later Application Report **→ NEXT**

8. Click **Save & Continue**.



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

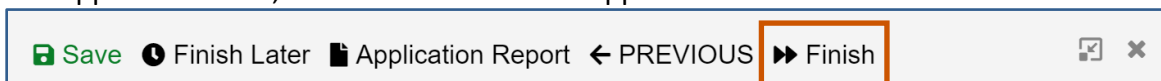
Project Summary *

Authorized Certifying Official Project Director/Manager

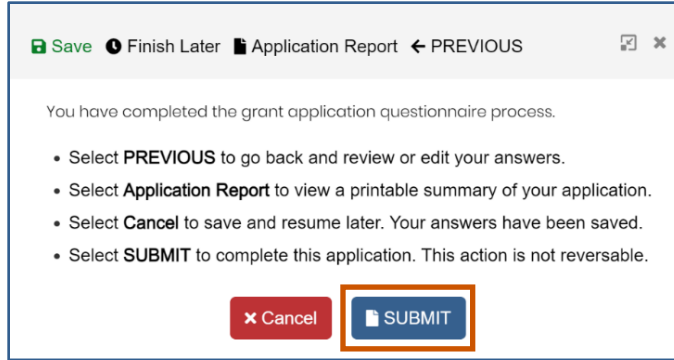
Project Manager/Coordinator Compliance/Fiscal Officer

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

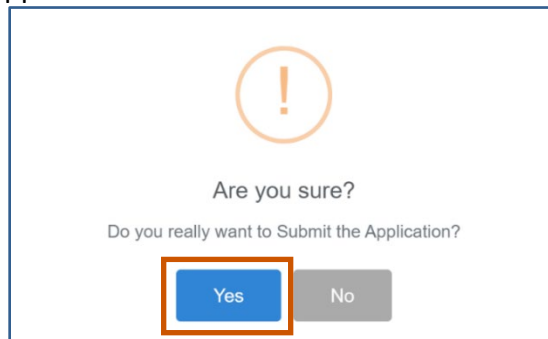
10. Click **Finish** ►►. The Submission page appears telling you how to go back and review your answers, how to view the application report, how to save and resume the application later, and how to submit the application.



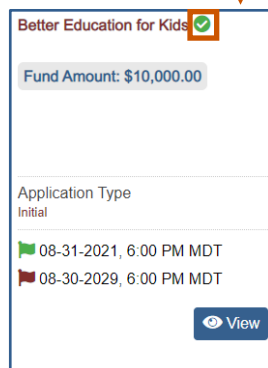
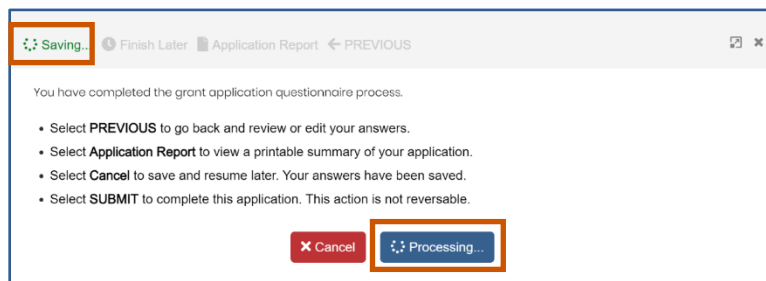
11. Click **Submit** 📄. A popup appears asking if you are sure you want to submit the application.



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



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



My Application

You can view applications you have saved.

The screenshot shows a list of funding announcements. A search bar at the top allows users to search by announcement name or funding announcement number. A 'Sort By' dropdown menu is visible, with options for Funding Announcement, Funding Amount, Newly Posted, and Closing Soon. A callout box points to the 'Save' button, indicating that clicking it saves the announcement to the My Application page. Another callout points to the 'View' button, indicating that clicking it allows the user to view the announcement details. A third callout points to the 'Sort By' dropdown, indicating that it can be used to sort the announcements. A fourth callout points to the announcement details, indicating that it displays the name of the announcement, the application type, and the application open and close date.

Choose the view display for the announcement

Use the search bar to choose an announcement.

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

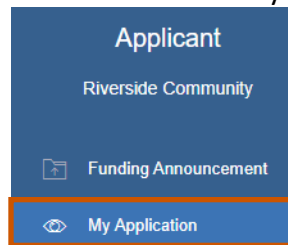
Use the Sort By drop-down list to sort the announcement.

View the announcement

Save the announcement to the My Application page.

Remove an Application from Saved

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



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

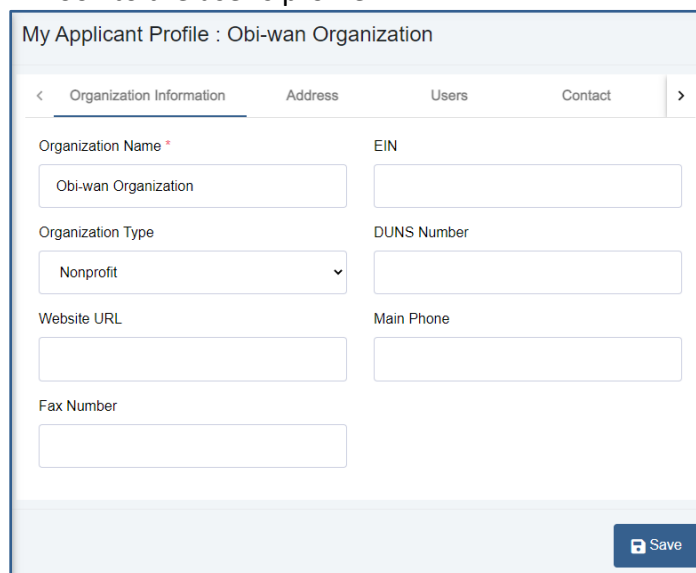
The screenshot shows the same list of funding announcements as before. The 'Remove From Saved' button is highlighted with a red box. A green popup message at the bottom right of the screen reads 'Application Removed Successfully' with a checkmark icon.

Remove the announcement to the My Application page.

Application Removed Successfully

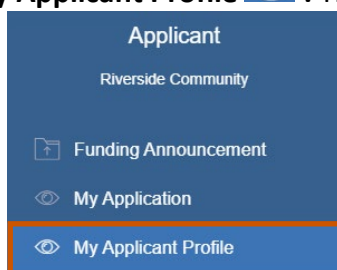
My Applicant Profile


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.



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

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



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

My Applicant Profile : Obi-wan Organization

< Organization Information Address Users Contact >

Organization Name * EIN

Organization Type DUNS Number

Website URL Main Phone

Fax Number

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

My Applicant Profile : Obi-wan Organization

< Organization Information Address Users Contact Documents >

Mailing Address

Address Line 1 Address Line 2 City

County State/Province/Region Country

Postal Code

Physical Address Same as Mailing Address

Address Line 1 Address Line 2 City

County State/Province/Region Country

Postal Code

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

The screenshot shows the 'My Applicant Profile' page for 'Obi-wan Organization'. The 'Users' tab is active, displaying a table with columns: Full Name, Organization Name, Job Title, Phone Number, and Email. A '+ New' button is located at the top left. A 'Total: 1' indicator is at the bottom left. A 'Save' button is at the bottom right. A pagination control shows '1' of 10 users. Callouts include: 'Click the link to view the user.' pointing to the '+ New' button; 'Add a user' pointing to the '+ New' button; 'Total number of users' pointing to 'Total: 1'; 'Use the arrows to see more users.' pointing to the pagination arrows; 'Use the drop-down list to choose how many users you see in the grid at a time.' pointing to the '10' dropdown; and 'Save the user' pointing to the 'Save' button.

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

Note: The red asterisks indicate required fields.

The 'Create New User' form is shown with the following fields and requirements:

- User Information:**
 - First Name *
 - Last Name *
- Job Title**
- Email Address ***
- Phone Number**
- User Name *** (This field is required.)
- Password ***
- Password (repeat) *** (Passwords do not match!)

Buttons: 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.

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.


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

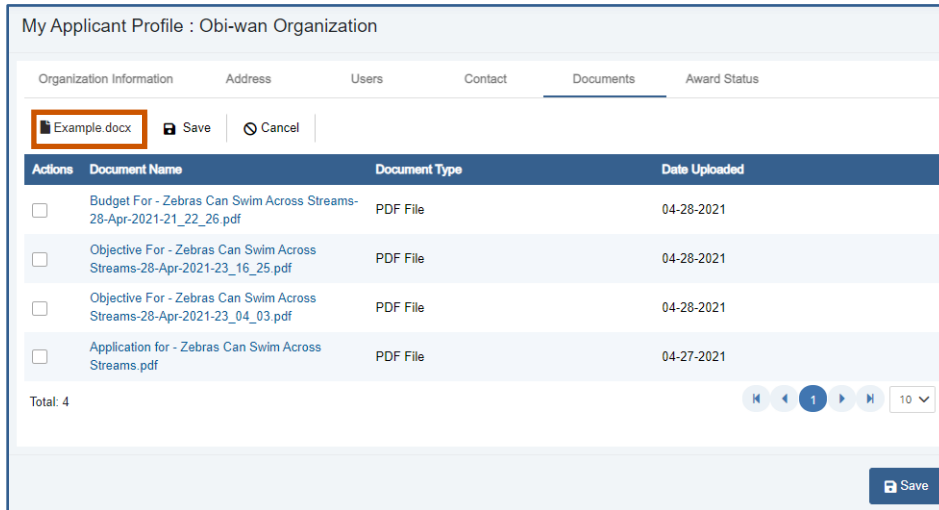
- c. **Optional:** On the Address Details, fill in the necessary fields.
- d. Click **Save** to save the contact to the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 8a-8d for each contact.

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

- a. Click **Choose File** .

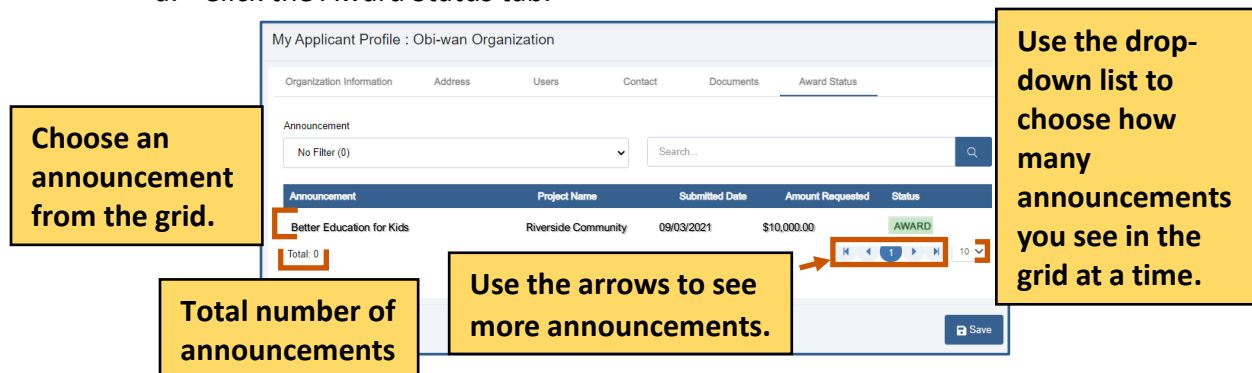
Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/>	Budget For - Zebras Can Swim Across Streams-28-Apr-2021-21_22_26.pdf	PDF File	04-28-2021
<input type="checkbox"/>	Objective For - Zebras Can Swim Across Streams-28-Apr-2021-23_16_25.pdf	PDF File	04-28-2021
<input type="checkbox"/>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

- 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.



 Saved Successfully.

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



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

My Applicant Profile : Obi-wan Organization

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

Use the search bar to find an announcement.

Announcement


No Filter (0)

Search...

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

Total: 0

Save

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

My Applicant Profile : Obi-wan Organization

Organization Information Address Users Contact Documents Award Status

Announcement

No Filter (0)

Search...

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

Total: 0

Save the applicant profile.

Save

 Saved Successfully.

Users




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

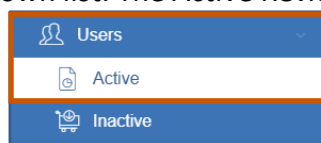
The screenshot shows the 'Users' management page. At the top left, there is a '+ New' button with a callout 'Create a user'. Below it is a search bar with the text 'Search...' and a magnifying glass icon, with a callout 'Use the search bar to search users.'. The main area contains a table with columns: Name, Email, Organization Unit, and Active. Two users are listed: 'Test Contact' (tcontact@applicant.com, Riverside Community, Active) and 'Mickey Mouse' (mmouse@applicant.com, Riverside Community, Active). Below the table, there is a 'Total: 2' label with a callout 'Total number of users'. To the right of the table is a pagination control with arrows and the number '1', with a callout 'Use the arrows to see more users.'. Further right is a dropdown menu showing '10', with a callout 'Use the drop-down list to choose how many users you see in the grid at a time.'. A callout 'Choose a user from the grid.' points to the first row of the table.

Active Users

You can view active users.




The screenshot shows the 'Active Users' management page. At the top left, there is a '+ New' button with a callout 'Add a user'. Below it is a search bar with the text 'Search...' and a magnifying glass icon, with a callout 'Use the search bar to choose a user.'. The main area contains a table with columns: Name, Email, Organization Unit, and Active. One user is listed: 'Test Contact' (tcontact@applicant.com, Obi-wan Organization, Active). Below the table, there is a 'Total: 1' label with a callout 'Total amount of users'. To the right of the table is a pagination control with arrows and the number '1', with a callout 'Use the arrows to navigate users.'. Further right is a dropdown menu showing '10', with a callout 'Choose how many users are displayed in the grid at a time.'.

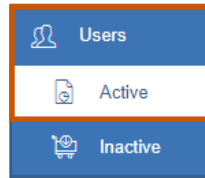
- From the site map, click **Review Management**  and click **Review Panel** . Choose **Active**  from the drop-down list. The Active Reviewers screen appears.



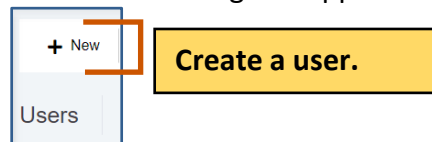
Create a User

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



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



- 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.


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

 A dialog box titled 'Create New User' with a close button (X) in the top right. It has two tabs: 'User Information' (selected) and 'Address'. Under 'User Information', there are fields for 'First Name *', 'Last Name *', 'Parent Organization *' (with a dropdown menu showing 'Riverside Community'), 'Job Title', 'Email Address *', 'Phone Number', 'User Name *', 'Password *', and 'Password (repeat) *'. At the bottom are 'Cancel' and 'Save' buttons. A yellow callout box with an arrow points to the 'Parent Organization' dropdown.

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





Note: The red asterisks indicate required fields.

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.

 Saved Successfully.

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.

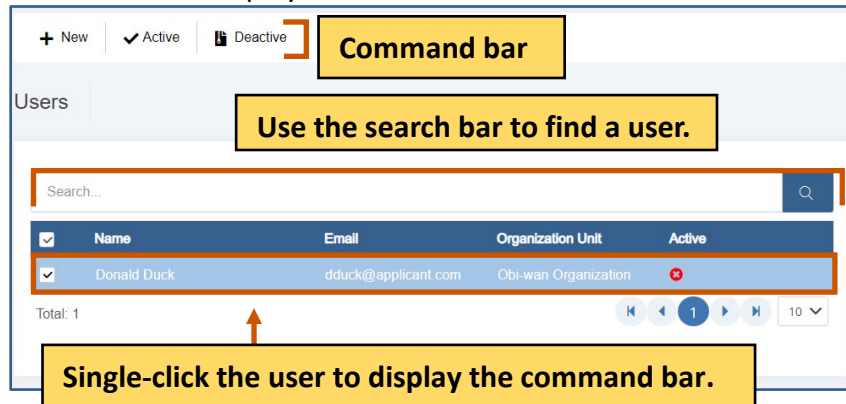
3. Edit the necessary fields for each tab.
 **Note:** The red asterisks indicate required fields.
4. Click **Save** . The changes are saved. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 1-5 for each council review you wish to edit.

 Saved Successfully.

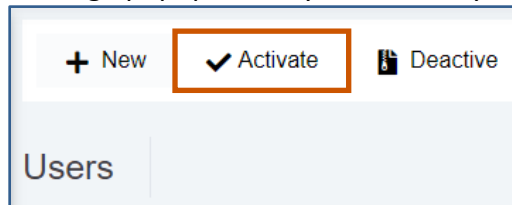
Activate a User

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

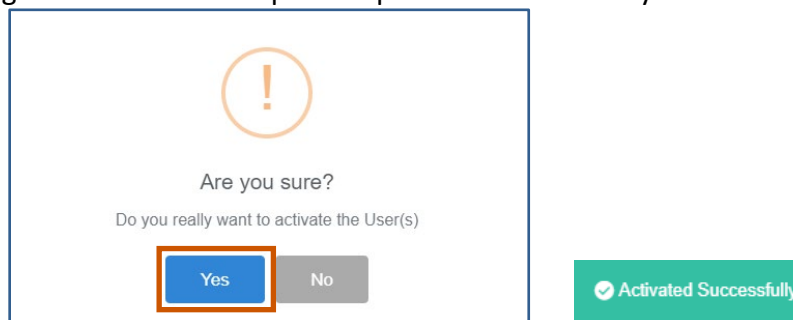
1. **Optional:** Use the search bar to find a user.
2. **Single-click** the user to display the command bar.



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



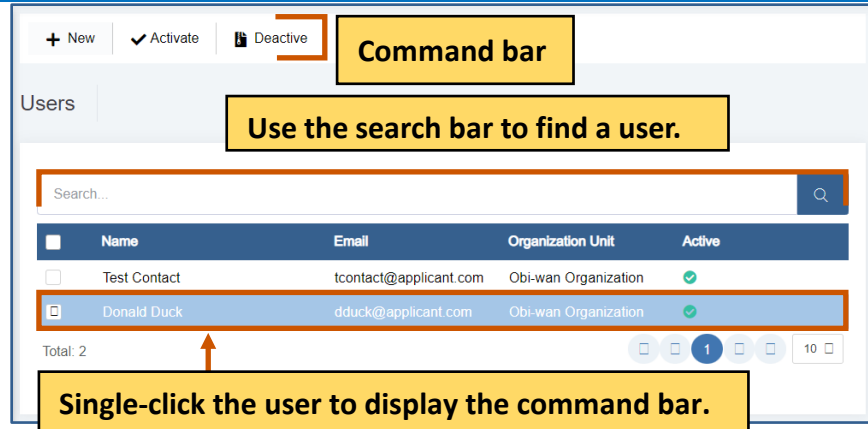
4. Click **Yes**. The user is deactivated. A green Activated Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each user you wish to deactivate.




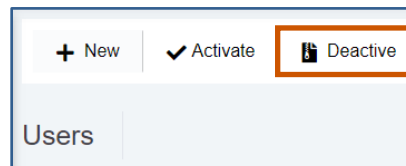
Deactivate a User

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

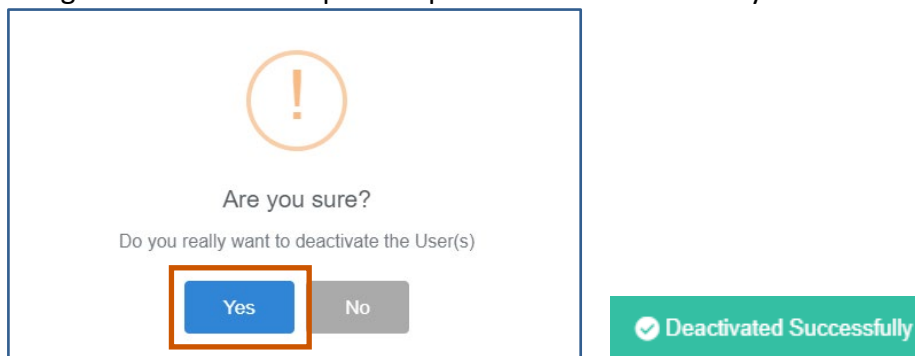
1. **Optional:** Use the search bar to find a user.
2. **Single-Click** the user to display the command bar.



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



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






Inactive Users

You can view inactive review panels.

The screenshot shows a 'Users' management interface. At the top left, there is a '+ New' button and an 'Add a user' button. Below this is a search bar with the placeholder text 'Search...'. A table below the search bar lists users with columns for 'Name', 'Email', 'Organization Unit', and 'Active'. The first row shows 'Donald Duck' with email 'dduck@applicant.com' and 'Obi-wan Organization'. The 'Active' column has a red 'x' icon. Below the table, there is a 'Total: 1' label. At the bottom right, there is a pagination control with arrows and the number '1', and a dropdown menu showing '10'.

Callouts in the image provide instructions:

- Use the search bar to choose a user.** (Points to the search bar)
- Use the arrows to search through the users.** (Points to the pagination arrows)
- Choose how many users are displayed in the grid at a time.** (Points to the '10' dropdown)
- Total amount of users** (Points to the 'Total: 1' label)

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

The screenshot shows a dropdown menu with three options: 'Users' (with a user icon), 'Active' (with a document icon), and 'Inactive' (with a document icon and a red 'x' icon). The 'Inactive' option is highlighted with a blue background.

Contacts

View the contacts related to the application.

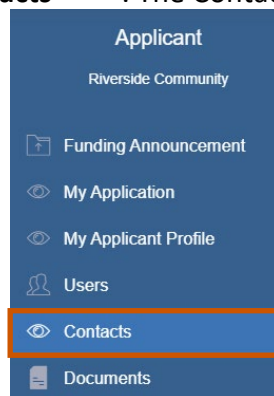
The screenshot shows the 'Contacts' page interface. A '+ New' button is highlighted with a callout 'Create a contact.'. Below it is a table with columns: Full Name, Organization Name, Job Title, Phone Number, and Email. Two contacts are listed: 'Test Contact' and 'Donald Duck'. A 'Total: 2' label is shown below the table. A pagination control shows '1' of 10 items, with arrows for navigation. A callout 'Choose a contact from the grid.' points to the first row. Another callout 'Use the arrows to see more contacts.' points to the pagination arrows. A third callout 'Use the drop-down list to choose how many contacts you see in the grid at a time.' points to the '10' dropdown menu.

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

Total: 2

Add a Contact

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



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

The screenshot shows a 'Create a contact' interface with a table of contacts. The table has columns for Full Name, Organization Name, Job Title, Phone Number, and Email. Two contacts are listed: 'Test Contact' and 'Donald Duck'. Below the table, there is a 'Total: 2' indicator and a pagination control with arrows and a dropdown menu set to '10'.

Callouts:

- Create a contact.** (Yellow box pointing to the '+ New' button)
- Choose a contact from the grid.** (Yellow box pointing to the checkboxes in the table)
- Total number of contacts** (Yellow box pointing to 'Total: 2')
- Use the arrows to see more contacts.** (Yellow box pointing to the pagination arrows)
- Use the drop-down list to choose how many contacts you see in the grid** (Yellow box pointing to the '10' dropdown)

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

Note: The red asterisks indicate required fields.

The screenshot shows a 'Create new contact' form with two tabs: 'Contact Details' and 'Address'. The 'Contact Details' tab is selected. The form contains the following fields:

- First Name *
- Last Name *
- Job Title *
- Email *
- Phone Number *
- Fax Number


At the bottom right, there are 'Cancel' and 'Save' buttons.

4. **Optional:** On the address tab, fill in the necessary fields.
Note: The red asterisks indicate required fields.
5. Click **Save** to save the contact. They appear in the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 2-4 for each contact.

Edit a Contact

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

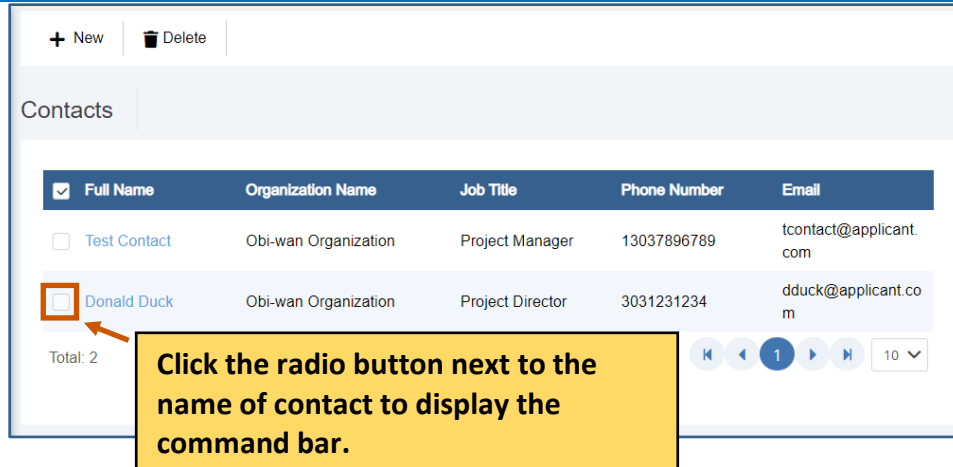
<input checked="" type="checkbox"/>	Full Name	Organization Name	Job Title	Phone Number	Email
<input type="checkbox"/>	Test Contact	Obi-wan Organization	Project Manager	13037896789	tcontact@applicant.com
<input type="checkbox"/>	Donald Duck	Obi-wan Organization	Project Director	3031231234	dduck@applicant.com

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

 Saved Successfully.

Delete a Contact

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




+ New Delete

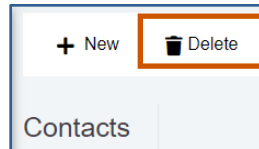
Contacts

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

Total: 2

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.



+ New Delete

Contacts

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.

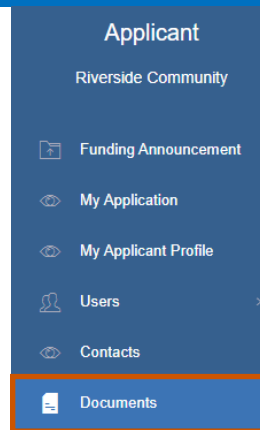
The screenshot shows a 'Documents' interface with several callouts:



- Command bar:** A yellow box highlights the top navigation area containing 'Choose File', 'Save', and 'Cancel' buttons.
- Choose a contact from the grid:** A yellow box highlights the search bar and the first two rows of the document grid.
- Total number of documents:** A yellow box highlights the 'Total: 2' indicator at the bottom left of the grid.
- Use the arrows to see more documents:** A yellow box highlights the pagination navigation arrows.
- Use the drop-down list to choose how many users you see in the grid at a time:** A yellow box highlights the page number '1' and the page size dropdown menu set to '10'.

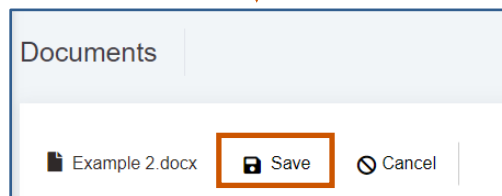
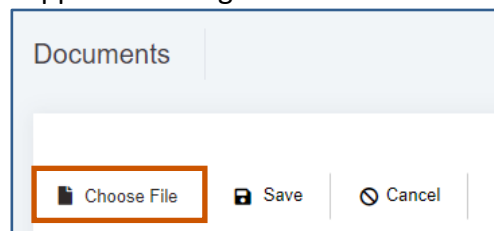
Command Options		Description
Choose File		Choose the file you want to upload.
Save		Save the file you want to upload
Cancel		If you choose a file you do not want to upload, you can cancel uploading the file.

Add a Document

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

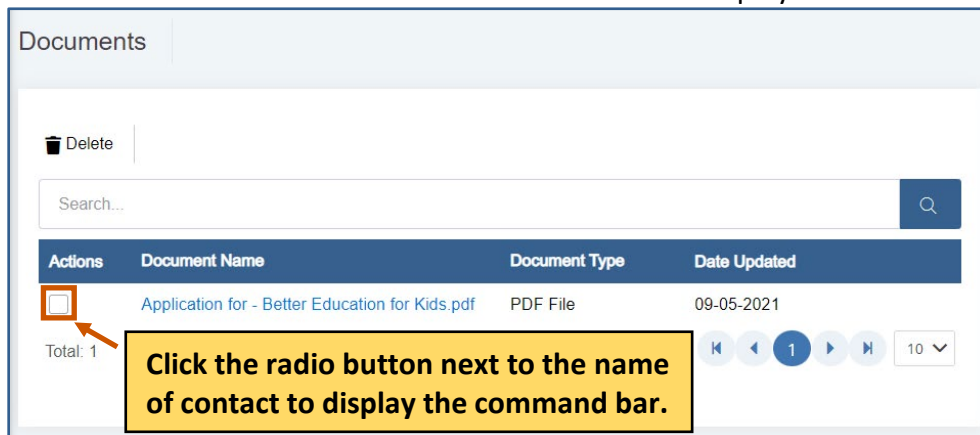


2. Click **Choose File** .
3. Upload the file.
4. Click **Save** . The file appears in the grid.

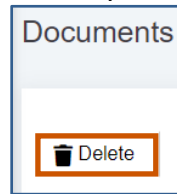


Delete a Document

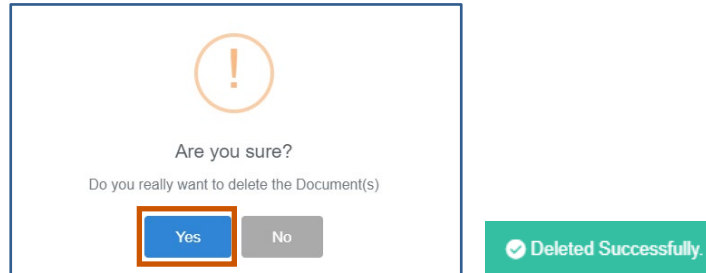
1. Click the radio button next to the name of document to display the command bar.



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



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



Budget Tools

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

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

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.

The screenshot shows a budget entry form. At the top, there are dropdown menus for 'Project Name' (Farmers Market and Local Foods Prc) and 'Year' (Year 1). To the right are 'Save Budget' and 'Budget Instructions' buttons. Below is a table with columns: 'Expand All', 'Direct', 'Cash Match', 'In-Kind Match', 'Total', and 'Leveraged'. The rows include 'Personnel' (with a sub-row for 'Project Director'), 'Personnel - other', 'Equipment', and 'Travel'. A 'Total' row is at the bottom. A callout box labeled 'Budget tools' points to a '+' icon next to the 'Equipment' row. Another callout box labeled 'Type in amount in cells that are white.' points to the white cells in the 'Direct', 'Cash Match', and 'In-Kind Match' columns.

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

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

The screenshot shows the 'Budget Justification' and 'Budget Narrative' section. It has a table with two columns: 'Budget Justification' and 'Budget Narrative'. The 'Budget Justification' column has a row for 'Personnel' with a sub-row for 'Project Director'. The 'Budget Narrative' column contains the text 'This is a budget narrative example.' Callout boxes explain that the 'Project Director' row displays the budget category and that the narrative text displays the budget narrative for that category.

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

Adding Budget Values

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

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

Project Name* Year*

Save Budget Budget Instructions

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

Budget tools

Type in amount in cells that are white.

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

Adding Budget Narratives

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

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

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

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

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

2. Add the appropriate information.

Example dialog box:

Budget Justification

Budget Narrative

Cancel Save

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

Repeat steps 1-3 for each budget narrative.

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

Displays the budget category


Displays the budget narrative about the specific budget category

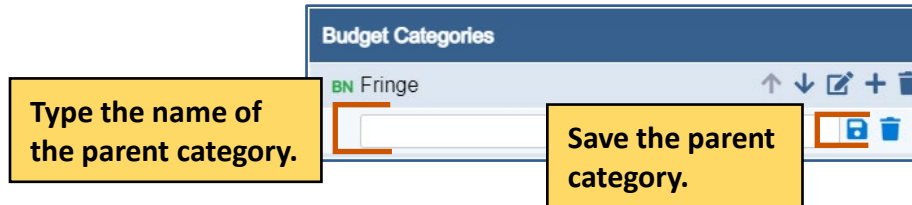
4. **Optional:** Click the BN next to the category to edit the information.

Adding a Parent Category



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

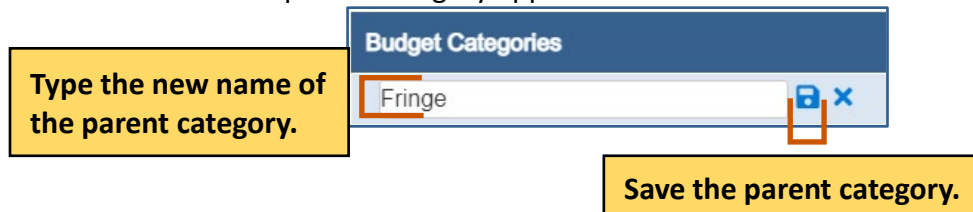
Budget Categories	Direct	Cash Match	In-Kind Match	Total	Leveraged
BN Fringe					
BN Supplies					
Total					

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




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.

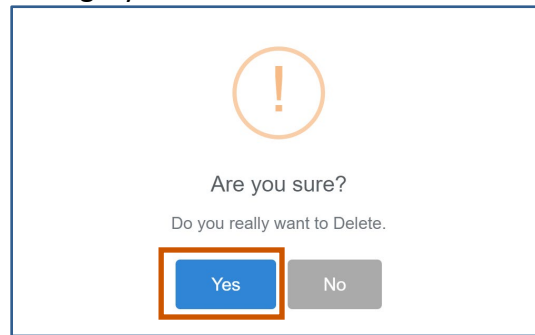


Deleting a Parent Category

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.



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.

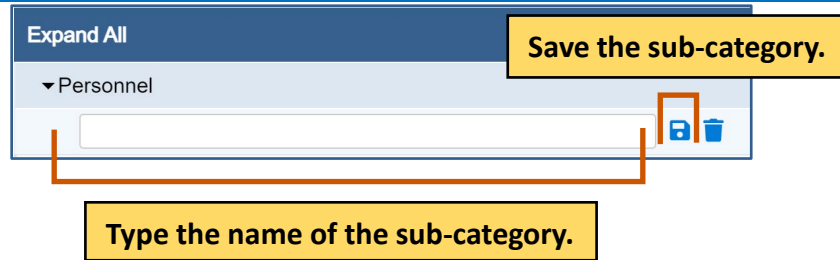
Budget Categories	Direct	Cash Match	In-Kind Match	Total	Leveraged
BN Fringe					
BN Supplies					
Total	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

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**.

The screenshot shows a grid with a blue header "Expand All" and a "Direct" column. The "Personnel" category is expanded, showing "Project Director" and its sub-categories: "BN Project Coordinator", "BN Equipment", and "BN Supplies". A yellow callout box on the left says "Click the blue arrow to expand the list." with an arrow pointing to the expand/collapse icon. A yellow callout box on the right says "Hover over New to add a sub-category." with a box around the "+" icon. A white dropdown menu is open under the "+" icon, showing "New sub-Category" and "New sub-Sub-Category".


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

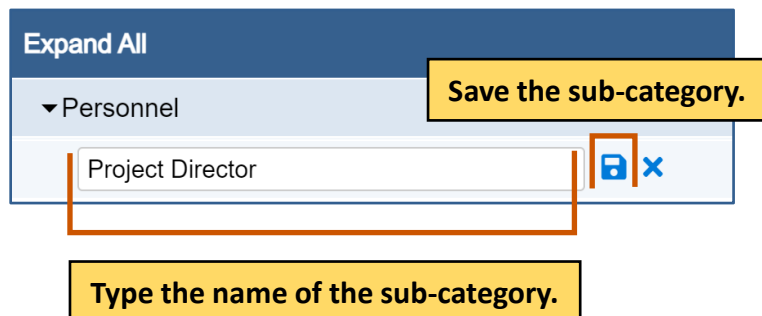


Editing a Sub-Category


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



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

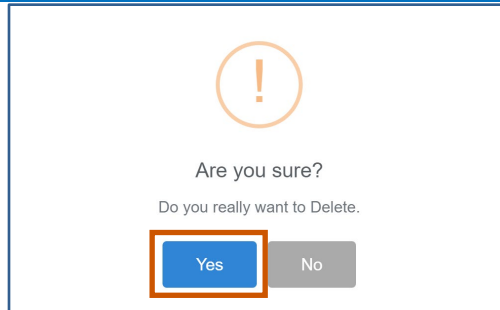


Deleting a Sub-Category

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



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



Move a Sub-Category Up or Down on the Grid

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

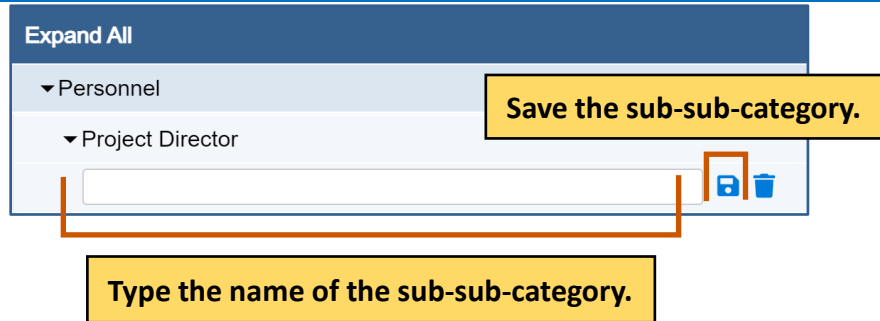


Adding a Sub-Sub-Category


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

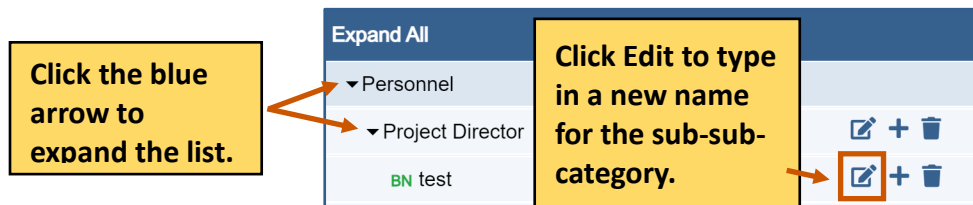



5. Type in the name of the sub-category.
6. Click **Save** 💾. The new sub-sub-category is added to the grid.

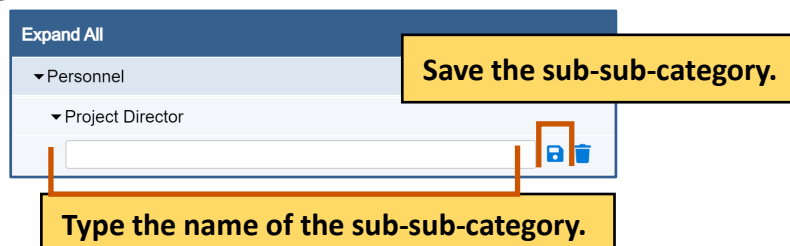


Editing a Sub-Sub-Category


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

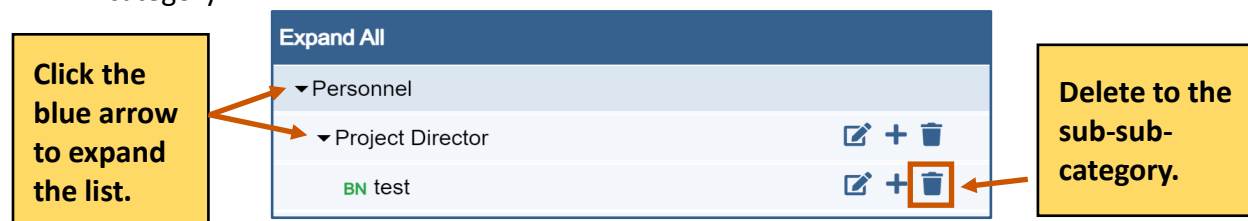


4. Type in the name of the sub-category.
5. Click **Save** .

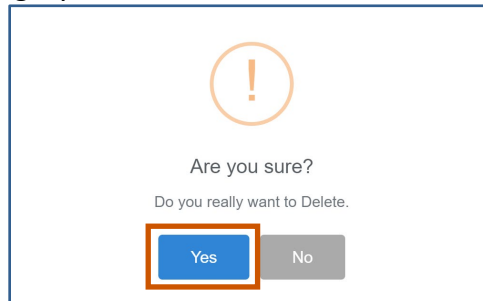


Deleting a Sub-Sub-Category

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



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



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

- 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** ↓ to move the sub-sub-category down the grid.

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

Objective Tools

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

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

The screenshot shows the 'Objective Template' configuration page. It features several sections for adding and managing different components of the objective template. Callout boxes provide instructions for each section:

- Save the Objective Template or read the Objective instructions:** Located at the top right, pointing to the 'Save Objective' and 'Objective Instructions' buttons.
- Use the arrow to display the objectives.:** Located on the left, pointing to the dropdown arrow next to the 'Goal' section header.
- Add a goal:** Points to the '+ Add Goal' button.
- Edit or delete the goal.:** Points to the edit and delete icons in the goal table row.
- Add an objective:** Points to the '+ Add Objective' button.
- Edit or delete the objective.:** Points to the edit and delete icons in the objective table row.
- Add a performance measure.:** Points to the '+ Add Measure' button.
- Add grant activity:** Points to the '+ Add Activity' button.
- Edit or delete the performance measure.:** Points to the edit and delete icons in the performance measure table row.
- Edit or delete the grant activity.:** Points to the edit and delete icons in the grant activity table row.

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

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

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

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

Adding a Goal

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

Update Objective

Goal | + Add Goal

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

Update Objective

Goal | + 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

Goal Name *

Start Date

End Date

Goal Description

Cancel Save

Save the goal

Adding an Objective

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

Use the arrow to display the objectives.

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

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

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

Update Objective

Goal

Fill in the necessary fields.

Note: The red asterisks indicate required fields.


Objective

Objective Name *	Objective Number *
<input type="text"/>	<input type="text"/>
Objective Start Date *	Objective End Date *
<input type="text"/>	<input type="text"/>
Goal *	Manager *
<input type="text"/>	--Select Manager--
Ref. Id	
<input type="text"/>	
Objective Description *	
<input style="height: 40px;" type="text"/>	
<input type="button" value="Cancel"/>	<input style="border: 2px solid orange;" type="button" value="Save"/>

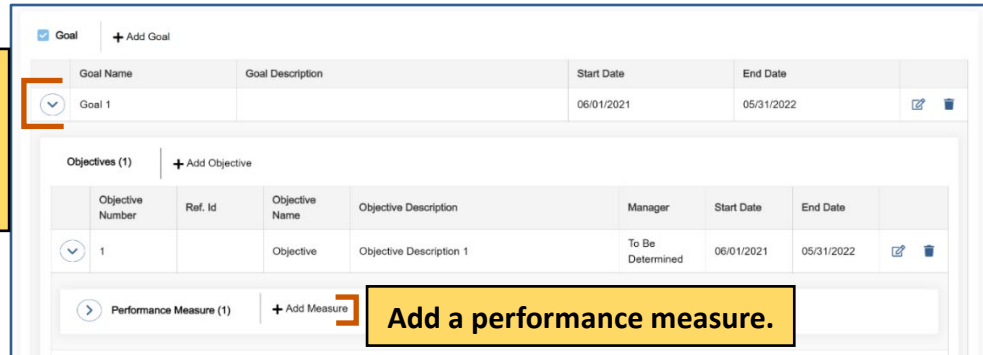
Save the new objective



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



Adding a Performance Measure



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



Use the arrow to display the objectives.

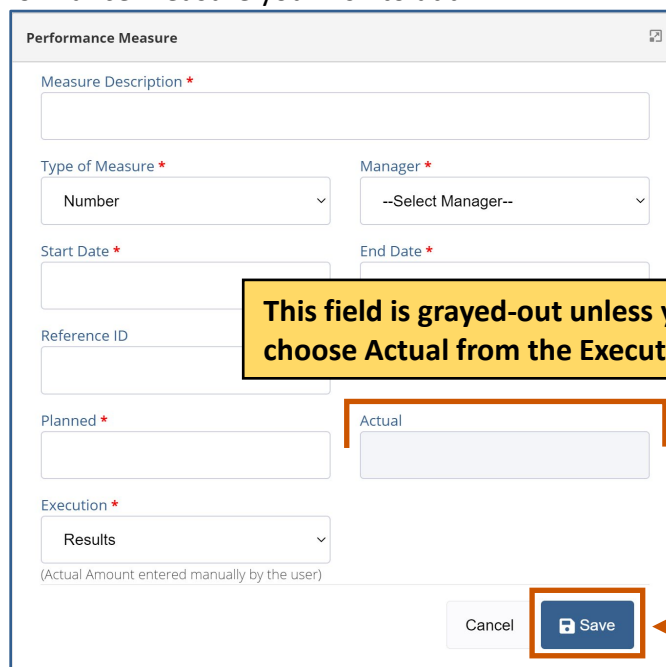


Goal Name	Goal Description	Start Date	End Date	
Goal 1		06/01/2021	05/31/2022	 

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

Performance Measure (1)  Add Measure 

4. Fill In the necessary fields.
 -  **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

Measure Description *

Type of Measure * Manager *

Number --Select Manager--

Start Date * End Date *

Reference ID

Planned * Actual

Execution * Results

(Actual Amount entered manually by the user)

Cancel Save

Save the new performance measure.

Adding a Grant Activity

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

Use the arrow to display the objectives.

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

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


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

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.

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	 

Edit the objective.


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

Objective

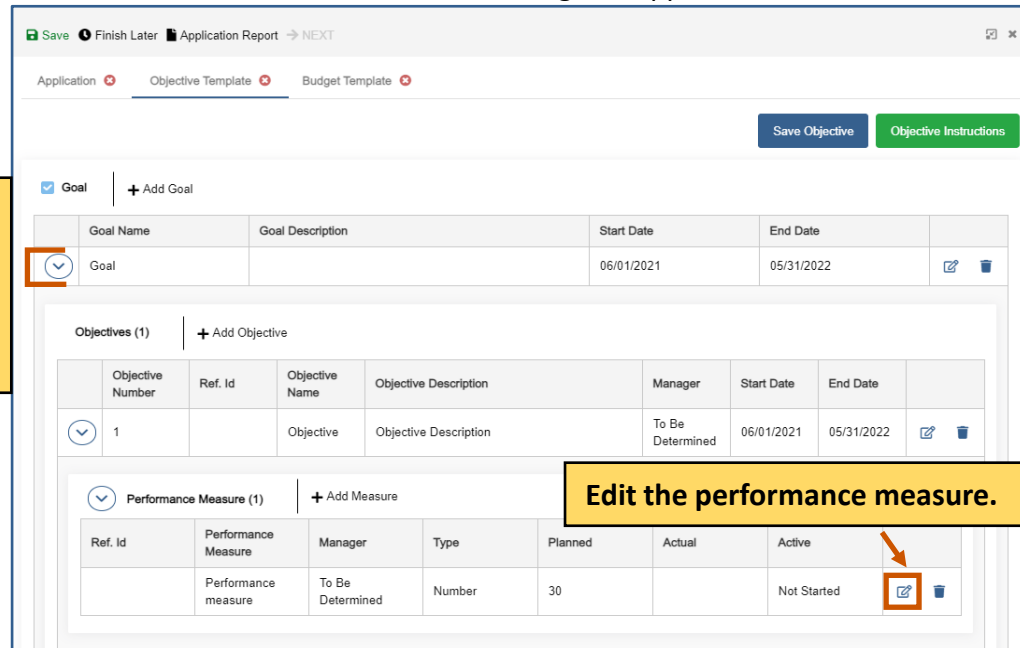
Objective Name *	Objective Number *
<input type="text"/>	<input type="text"/>
Objective Start Date *	Objective End Date *
<input type="text"/>	<input type="text"/>
Goal *	Manager *
<input type="text"/>	--Select Manager--
Ref. Id	
<input type="text"/>	
Objective Description *	
<input style="width: 100%;" type="text"/>	
Cancel	 Save

Save the changes to the objective.

Editing a Performance Measure



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

Use the arrow to display the objectives.





Save Objective Objective Instructions



Goal + Add Goal

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


Objectives (1) + Add Objective

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

Performance Measure (1) + Add Measure

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

Edit the performance measure.

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

Performance Measure

Measure Description *

Type of Measure * Manager *

Number --Select Manager--

Start Date * End Date *

Reference ID

Planned * Actual

Execution * Results


(Actual Amount entered manually by the user)

Cancel Save

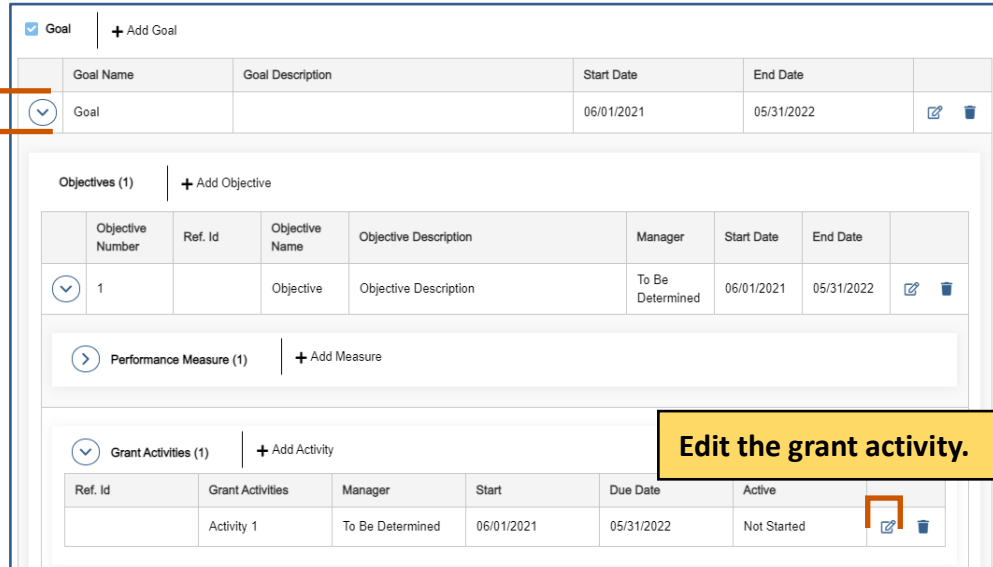
This field is grayed-out unless you choose Actual from the Execution field.

Save the changes to the performance measure.


Editing a Grant Activity

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

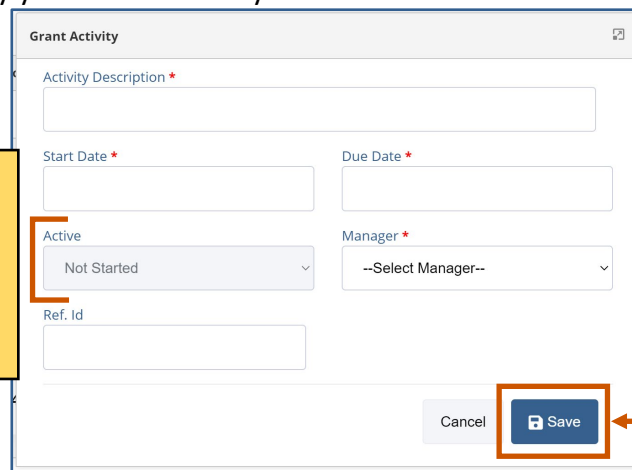
Use the arrow to display the objectives.



The screenshot shows a web interface for managing grant activities. At the top, there is a 'Goal' section with a table containing one row: 'Goal' with start date '06/01/2021' and end date '05/31/2022'. Below this is an 'Objectives (1)' section with a table containing one row: 'Objective' with start date '06/01/2021' and end date '05/31/2022'. At the bottom is a 'Grant Activities (1)' section with a table containing one row: 'Activity 1' with start date '06/01/2021', due date '05/31/2022', and status 'Not Started'. A yellow callout box on the left points to a downward arrow next to the goal name. Another yellow callout box on the right points to an 'Edit' icon (pencil) next to the grant activity row.

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


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



The 'Grant Activity' dialog box contains several input fields: 'Activity Description *' (text input), 'Start Date *' (date input), 'Due Date *' (date input), 'Active' (dropdown menu with 'Not Started' selected), and 'Manager *' (dropdown menu with '--Select Manager--' selected). There is also a 'Ref. Id' field. At the bottom right, there are 'Cancel' and 'Save' buttons. A yellow callout box on the left points to the 'Active' dropdown menu. Another yellow callout box on the right points to the 'Save' button.

Save the changes to the grant activity.

Deleting an Objective

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


Use the arrow to display the objectives.

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

Delete the objective.

Objectives (1)		+ Add Objective	
Objective Number	Ref. Id	Objective Name	Objective Description
1		Objective	Objective Description

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




Are you sure?

Do you really want to delete the Objective(s)

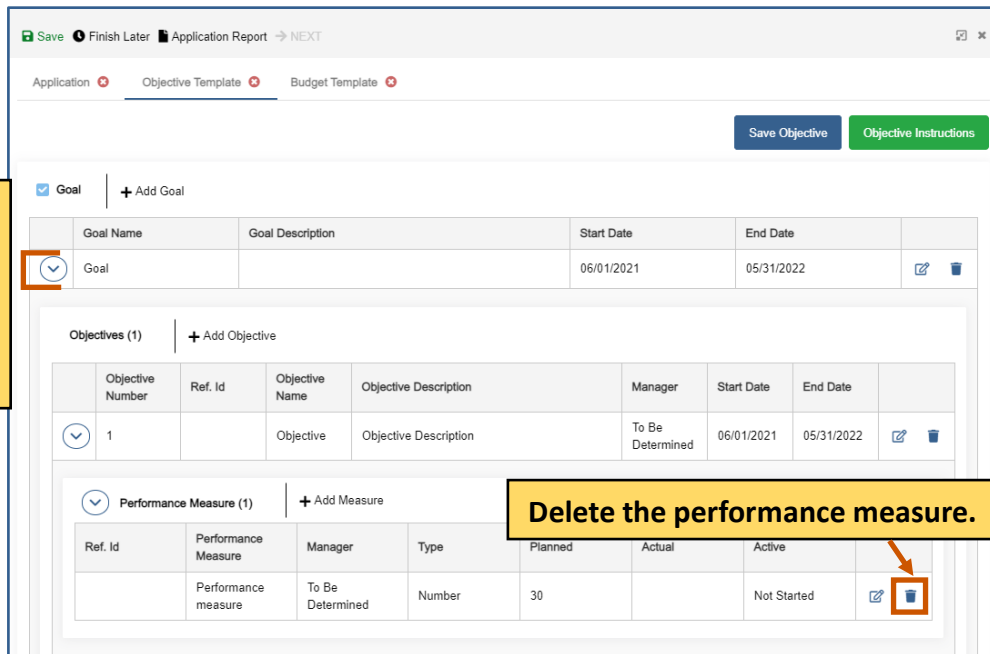
Yes

No

Deleting a Performance Measure

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

Use the arrow to display the objectives.



The screenshot shows the 'Objective Template' section of the application. It includes a 'Goal' table and an 'Objectives (1)' table. Below the objectives is a 'Performance Measure (1)' table. A yellow callout box on the left points to a dropdown arrow next to the 'Goal' row. Another yellow callout box on the right points to a trash icon next to a performance measure row in the 'Performance Measure (1)' table.

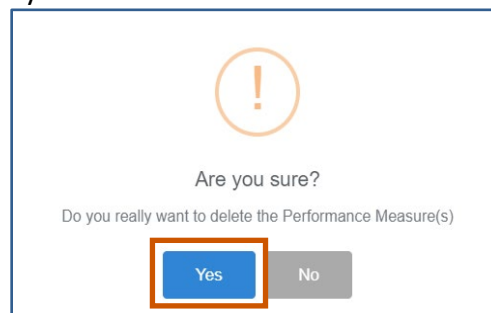
Goal Name	Goal Description	Start Date	End Date
Goal		06/01/2021	05/31/2022

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

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

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.



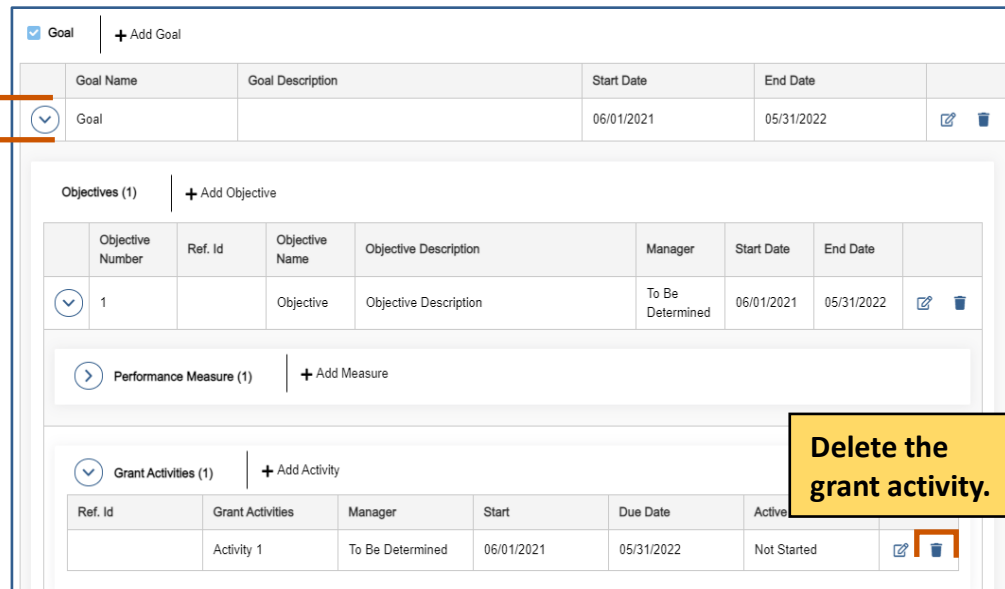
Are you sure?
Do you really want to delete the Performance Measure(s)



Yes No



Deleting a Grant Activity



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

Use the arrow to display the objectives.



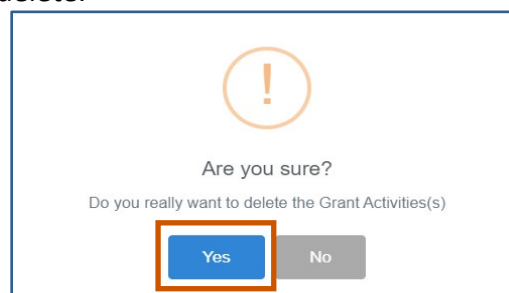
Goal Name	Goal Description	Start Date	End Date	
Goal		06/01/2021	05/31/2022	 

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

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

Delete the grant activity.

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



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

Yes No