ATTACHMENT A

DDS Applicant Instructions

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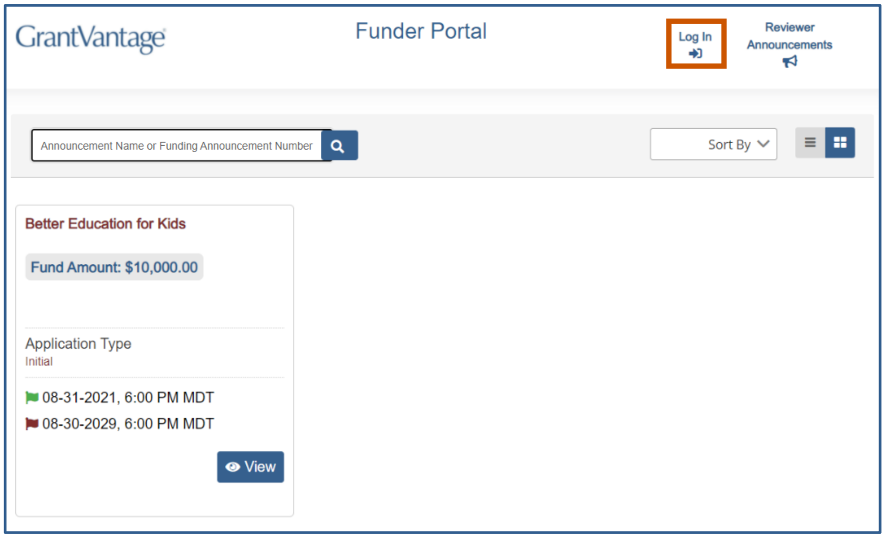
Login

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

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.

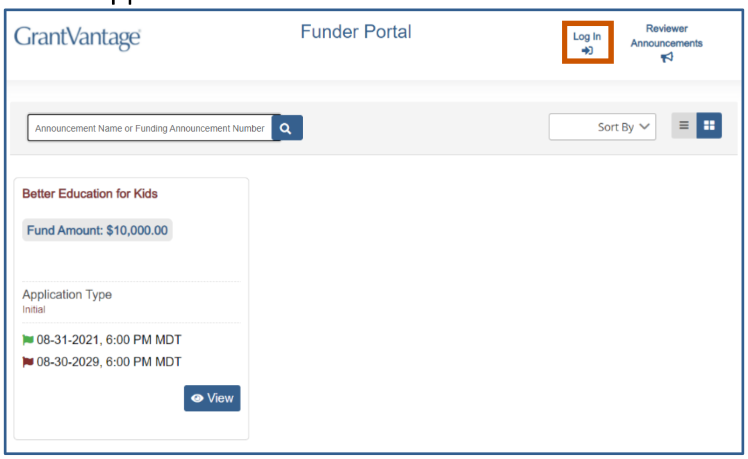


Register

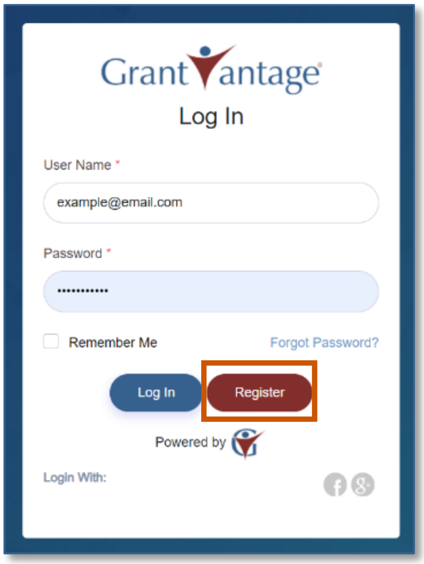
1. Open preferred web browser.
2. In the URL field of the web browser, enter the web address provided by GrantVantage. The public-facing view of the Funder Portal screen appears.

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.

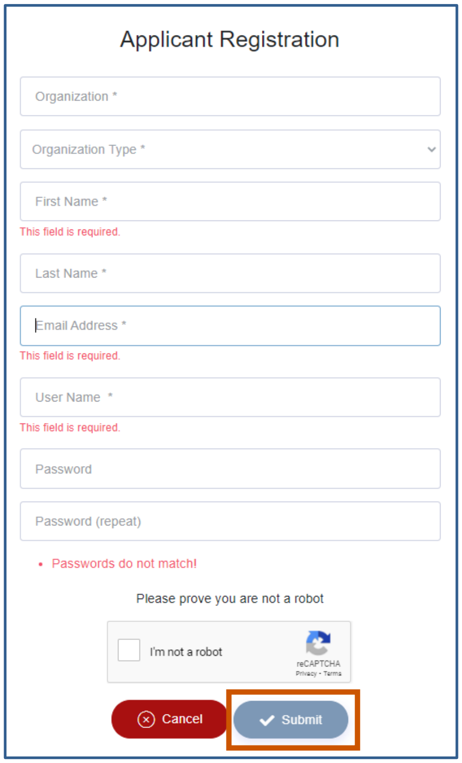


4. Click **Register.** You can now begin the registration process.



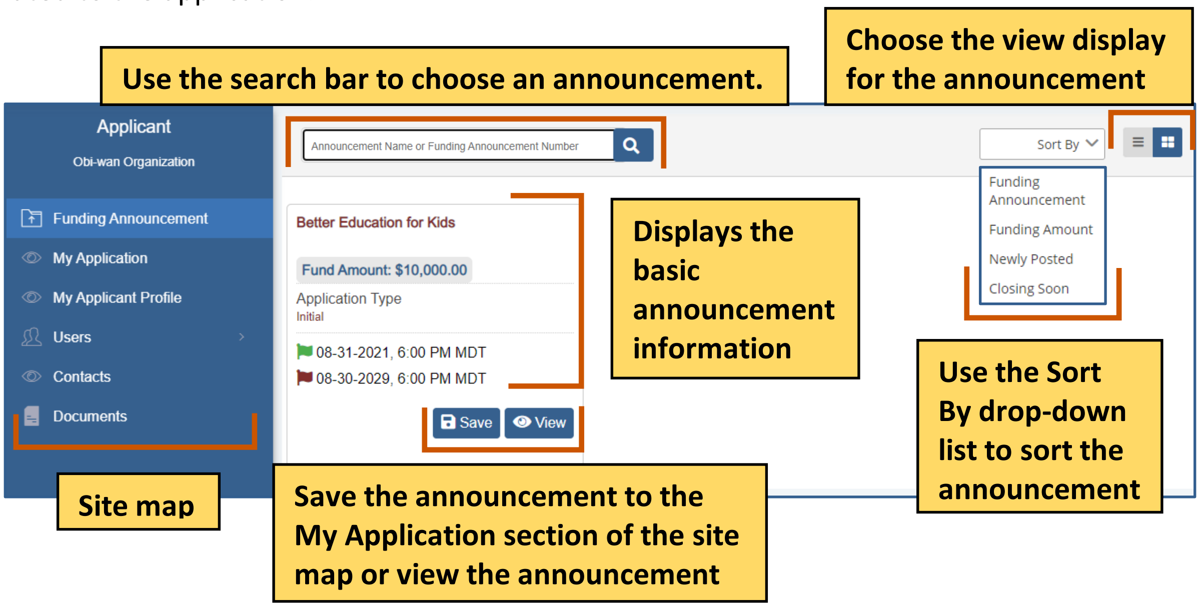
5. Fill in the necessary fields.
   Note: The black asterisks indicate required fields.

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

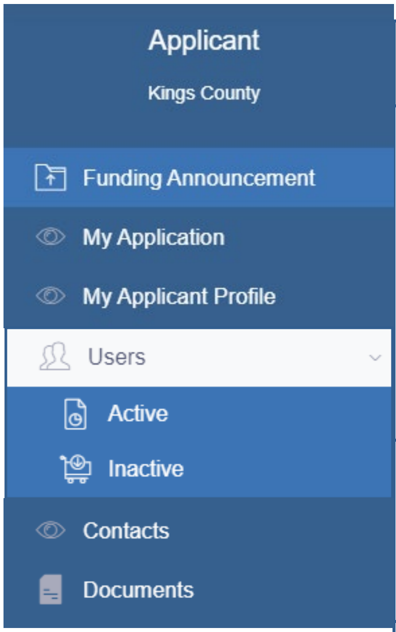
On the homepage, you can view all published funding announcement opportunities, opportunities you have applied for, your profile, and view users, properties, and documents related to the application.



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.

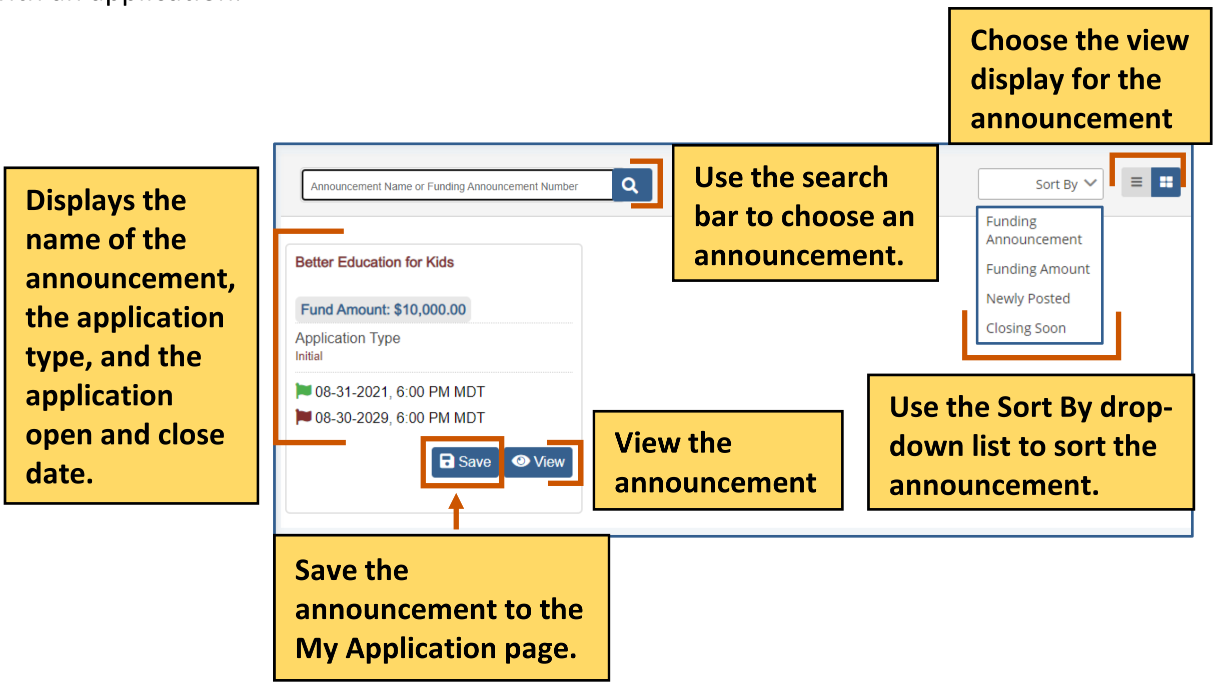
Site Map Options	Description
Funding Announcement 	Displays all published announcements.
My Application 	Displays all the announcements you have saved and/or applied to.



Site Map Options	Description
My Applicant Profile	View your Applicant Profile. You can add additional documents and relevant information such as a professional CV or other certifications related to the applicant or entity's qualifications.
Users	View the users related to the application. You can view active or inactive users.
Contacts	View the contacts related to the application.
Documents	View documents related to the application.

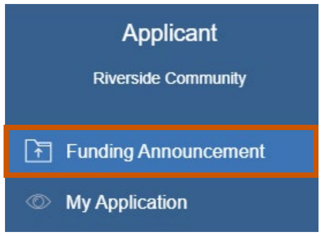
Funding Announcement

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

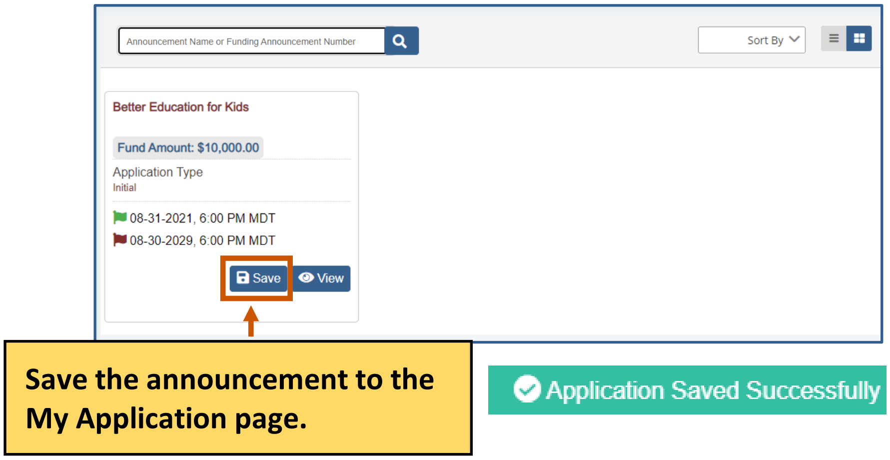


Save an Announcement

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

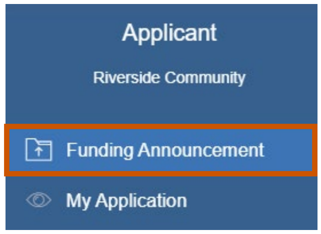


2. **Optional:** Use the search bar to find an announcement.
3. Click **Save** to save the announcement to the My Application sitemap section. A green Application Saved Successfully popup appears at the bottom right of the screen.

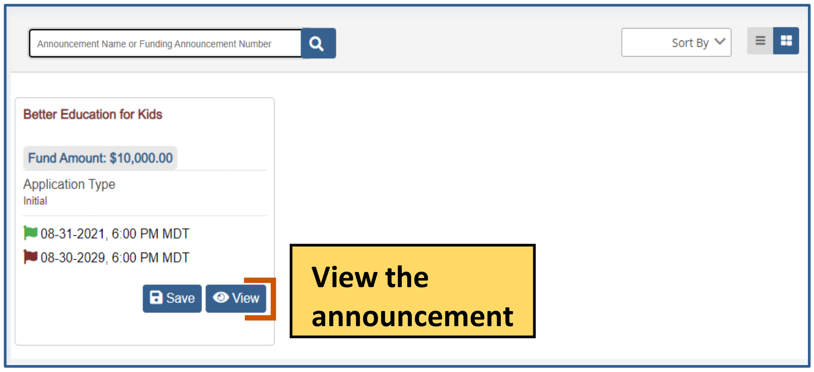


View an Announcement

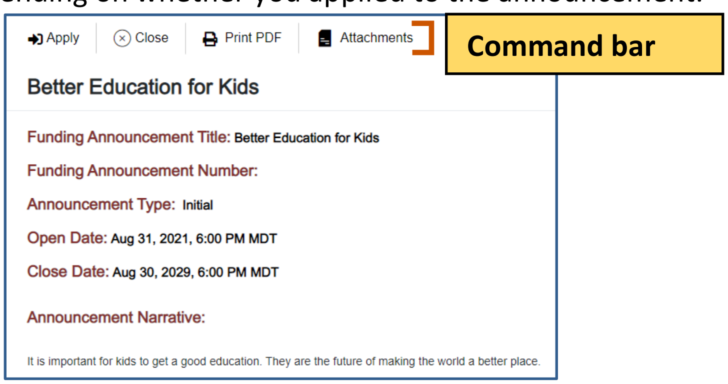
1. From the site map, click **Funding Announcement** **.** The Funding Opportunity for Applicant page appears.



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.

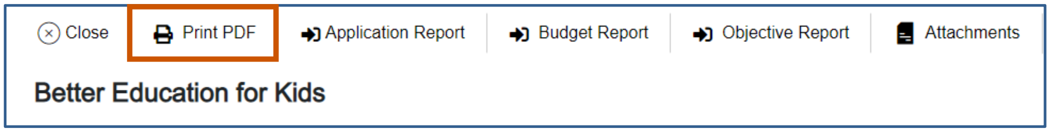
Announcement Command Bar	Descriptions
Budget	View the budget report and see all the budget categories. You only see this option if you have applied to the announcement.
Objective Report	View the objective report. See the objectives, performance measures, and grant activities. You only see this option 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.

Print the Announcement as a PDF

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

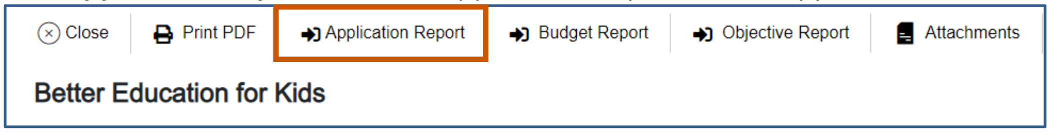
1. Click **Print PDF** . The announcement details download as a PDF.



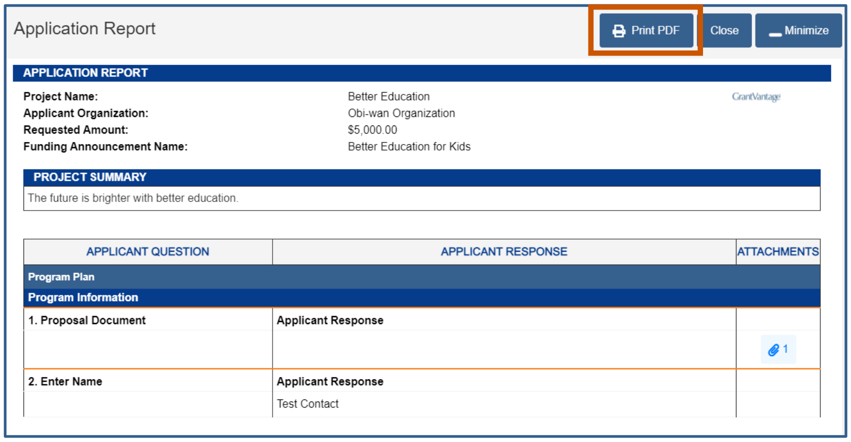
View the Applicant Report

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

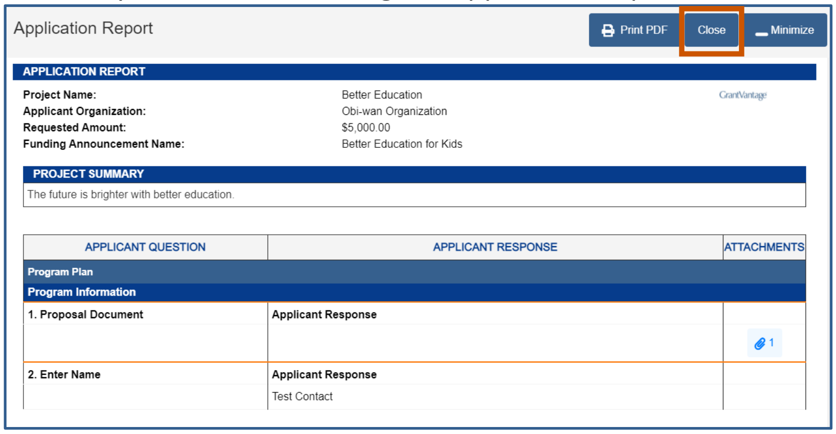
1. Click **Application Report** . The Application Report screen appears.



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

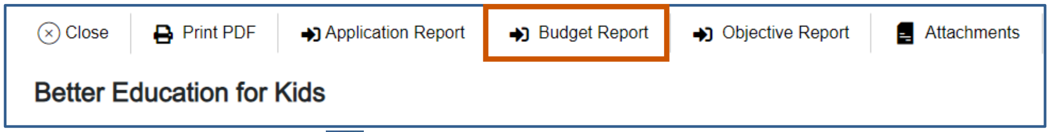


3. Click **Close** when you are done viewing the application report.

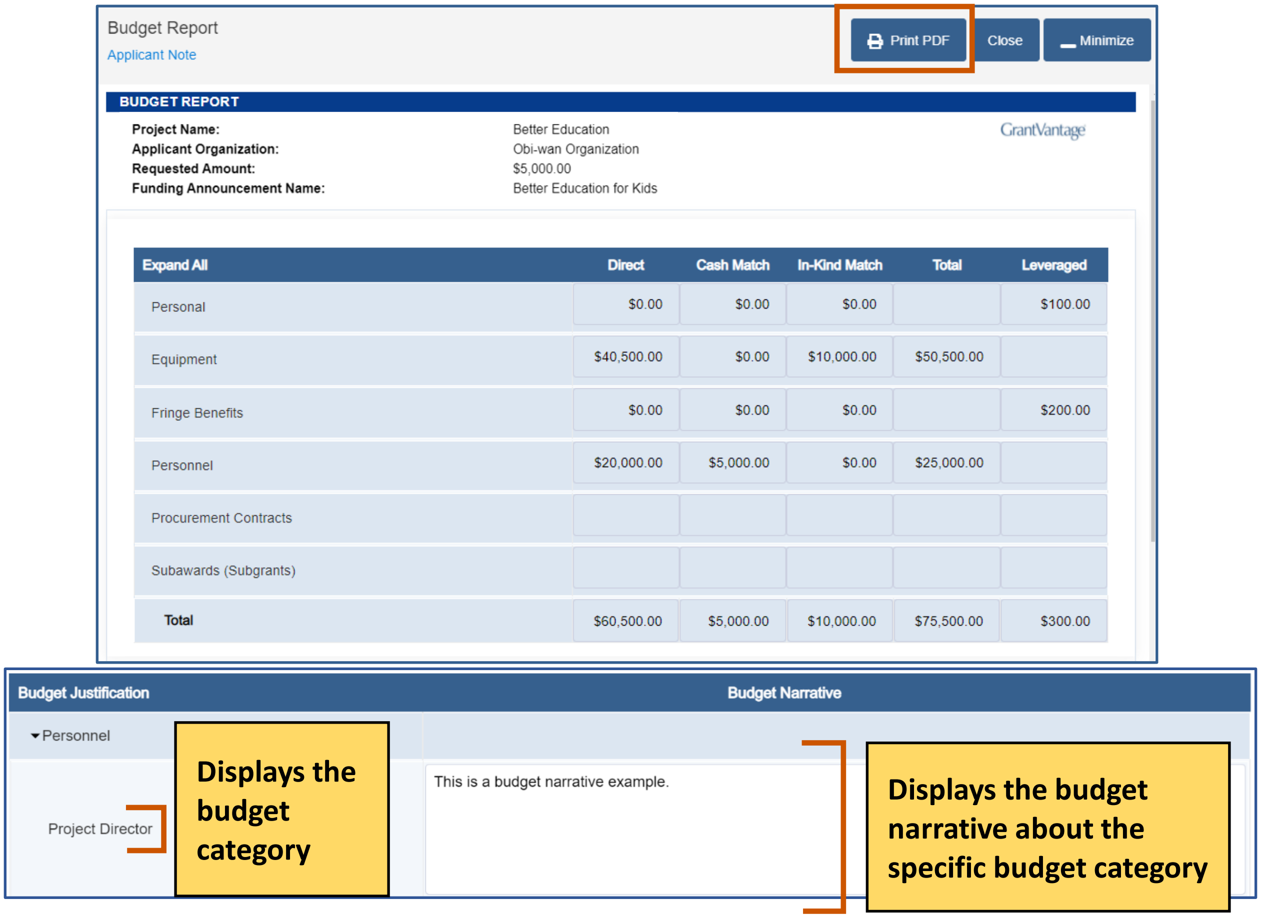


View the Budget Report

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



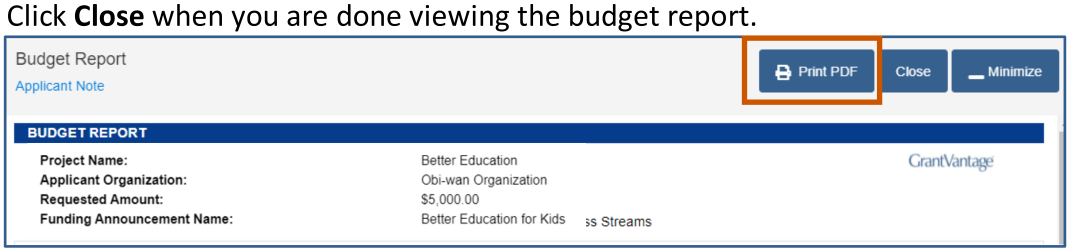
2. **Optional:** Click **Print PDF** to print the budget report as a PDF. The PDF is downloaded.



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

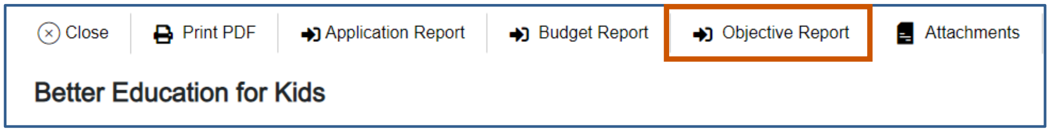
Expand All	Direct	Cash Match	In-Kind Match	Total	Leveraged
Personal	$0.00	$0.00	$0.00		$100.00
Equipment	$40,500.00	$0.00	$10,000.00	$50,500.00	
Fringe Benefits	$0.00	$0.00	$0.00		$200.00
Personnel	$20,000.00	$5,000.00	$0.00	$25,000.00	
Procurement Contracts					
Subawards (Subgrants)					
Total	$60,500.00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

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

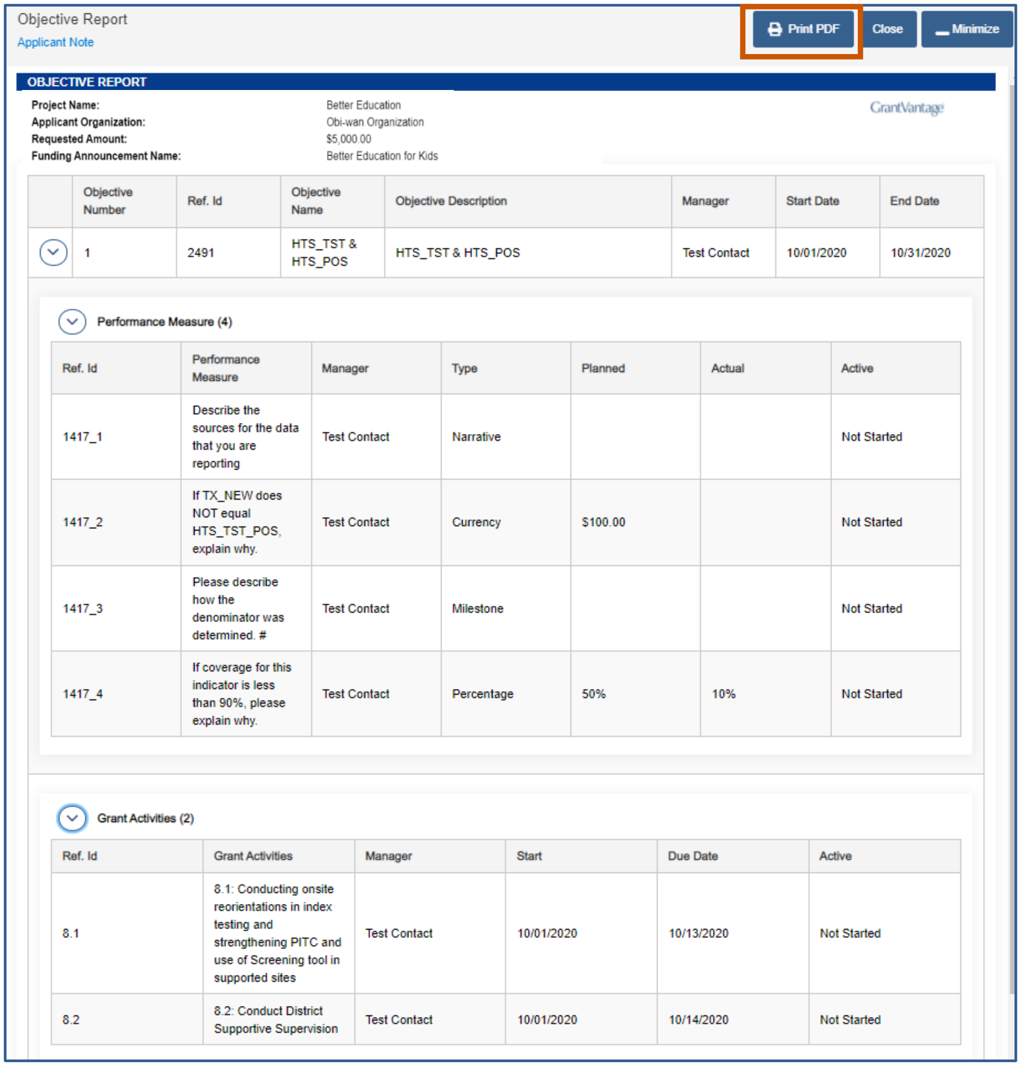


View the Objective Report

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
Applicant Note
Print PDF Close Minimize

OBJECTIVE REPORT

GrantVantage

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

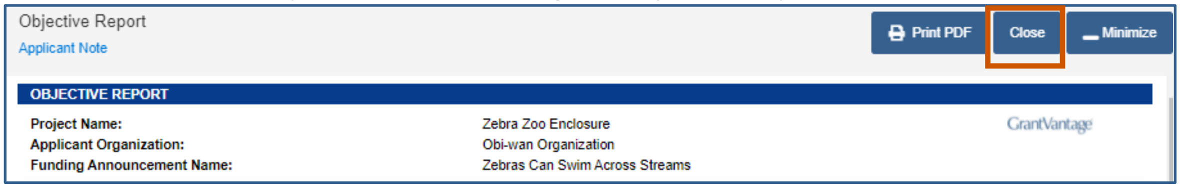
Performance Measure (4)

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)

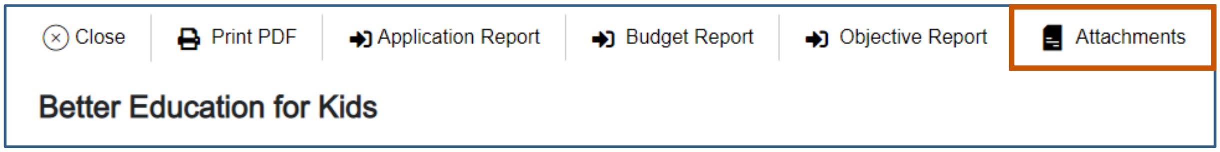
Ref. Id	Grant Activities	Manager	Start	Due Date	Active
8.1	8.1: Conducting onsite reorientations in index testing and strengthening PITC and use of Screening tool in supported sites	Test Contact	10/01/2020	10/13/2020	Not Started
8.2	8.2: Conduct District Supportive Supervision	Test Contact	10/01/2020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

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

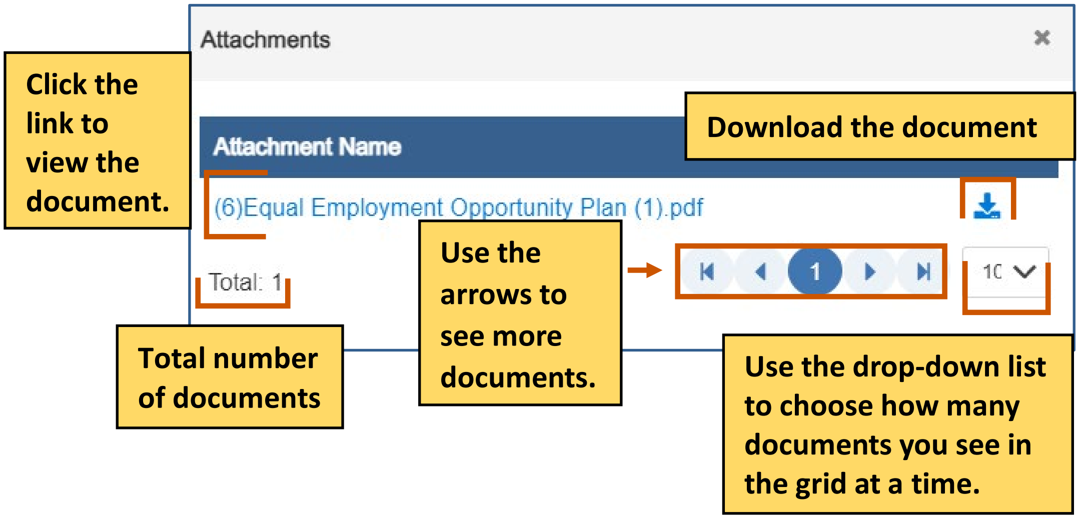


View Attachments associated with the Announcement

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



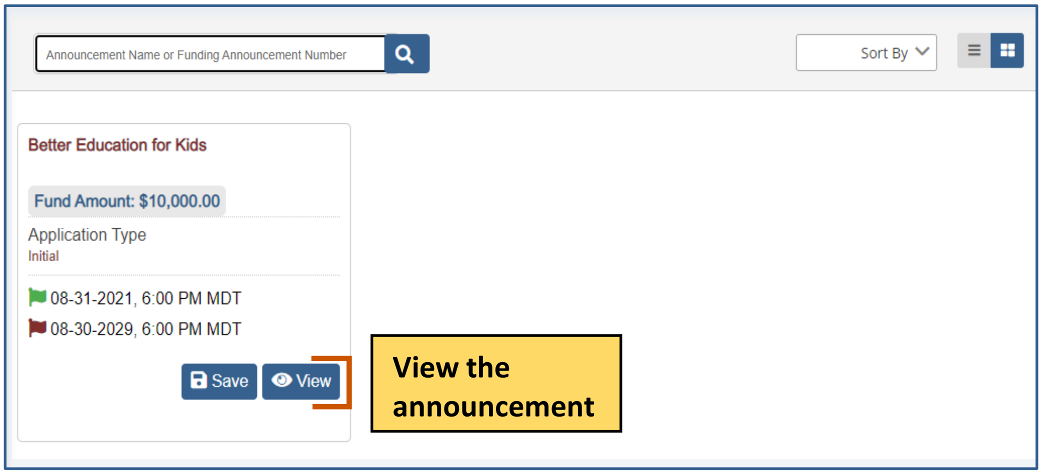
2. Optional: Click the link to view the document.
   Or
   Click **Download** to download the attachment. The attachment is downloaded.



Submitting Applications to a Funding Announcement

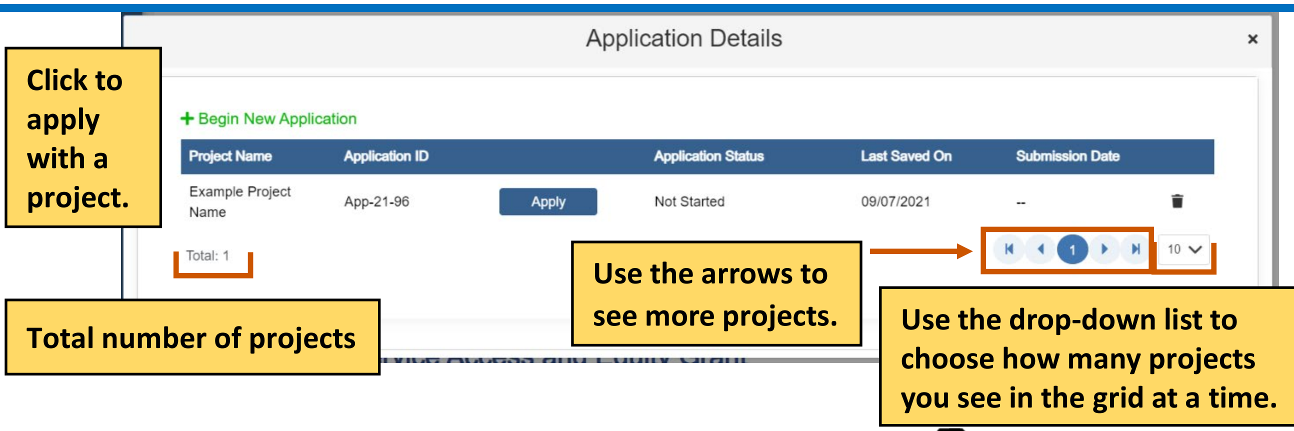
1. Click **View** next to the announcement you wish to view. The Funding Announcement Narrative appears.

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.



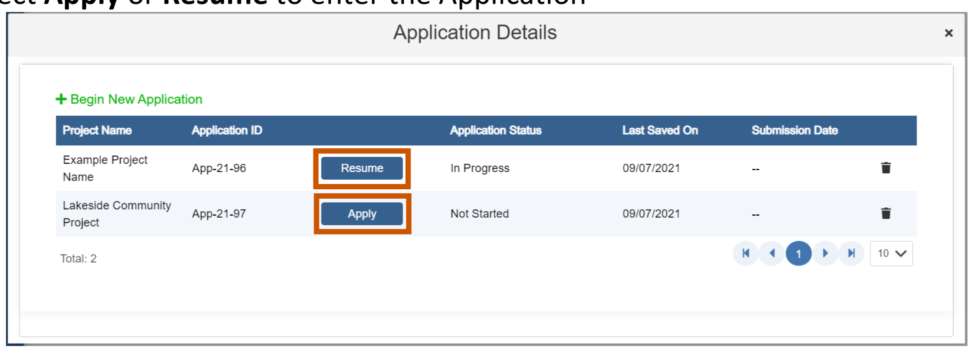
2. Click **Apply** **.** The Application Details dialog box appears.

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

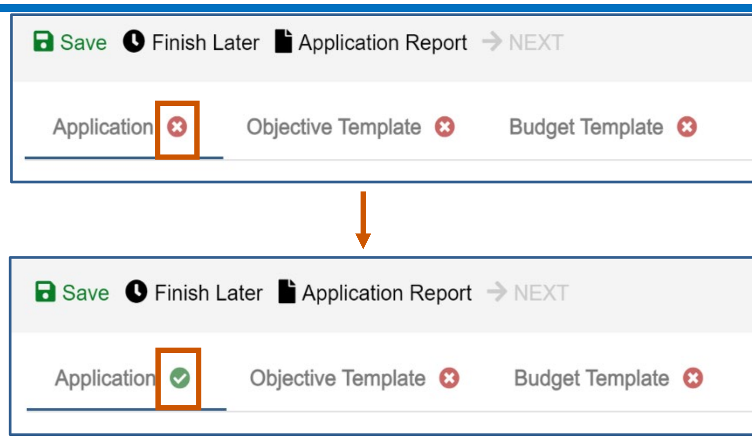


4. Enter the **Project Name** for the new application and select **Save**

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



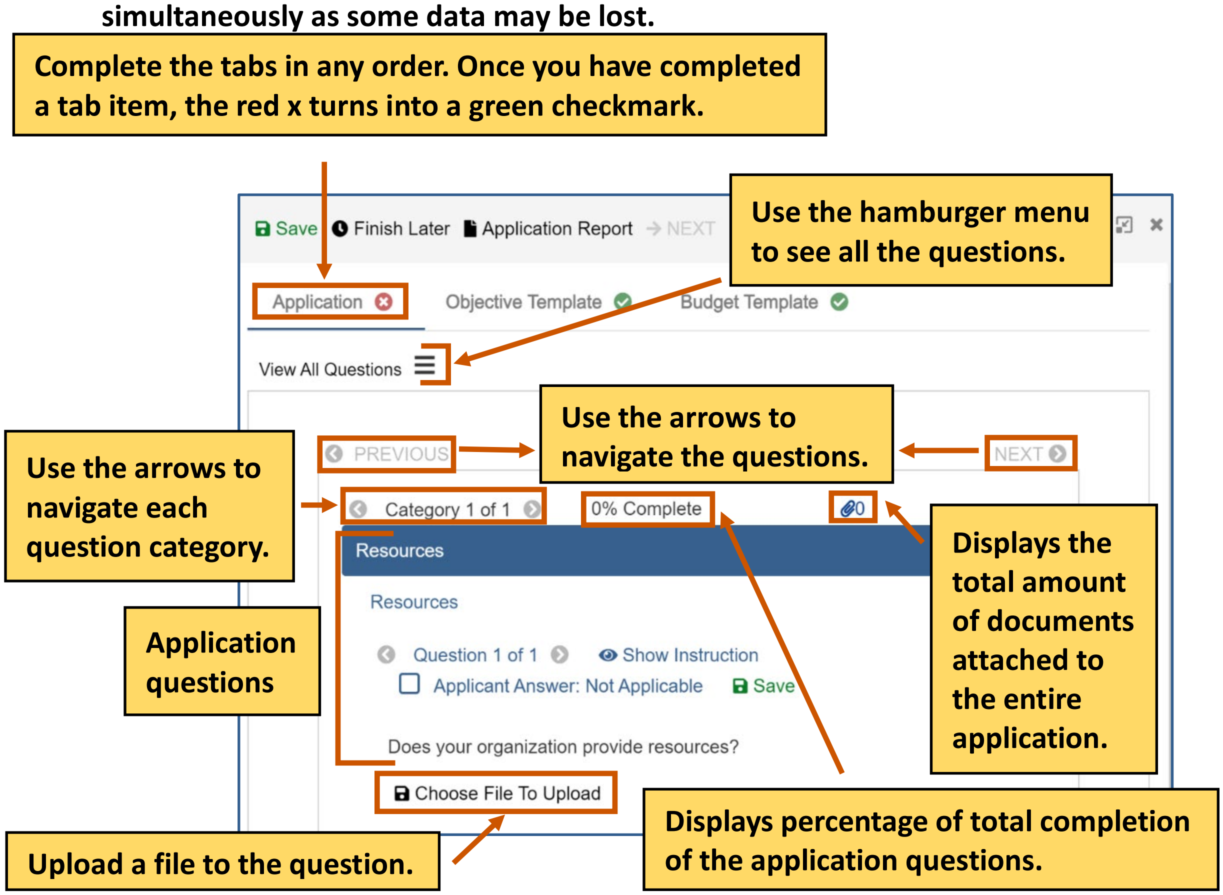
6. Answer all the questions and complete the templates. Swap between the tabs to complete them in any order.
   ⓘ **Note:** Once you complete a tab item, the red x next to the name turns into a green checkmark.



Application Questions:

a. Answer all questions.

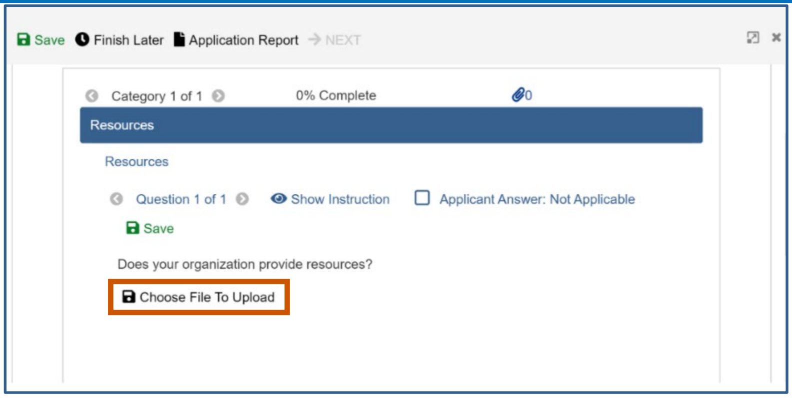
ⓘ **Note: Applications do not utilize live updates. Multiple users should not attempt to modify or save the same Question Answer, Objective Template, or Budget Template simultaneously as some data may be lost.**



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.

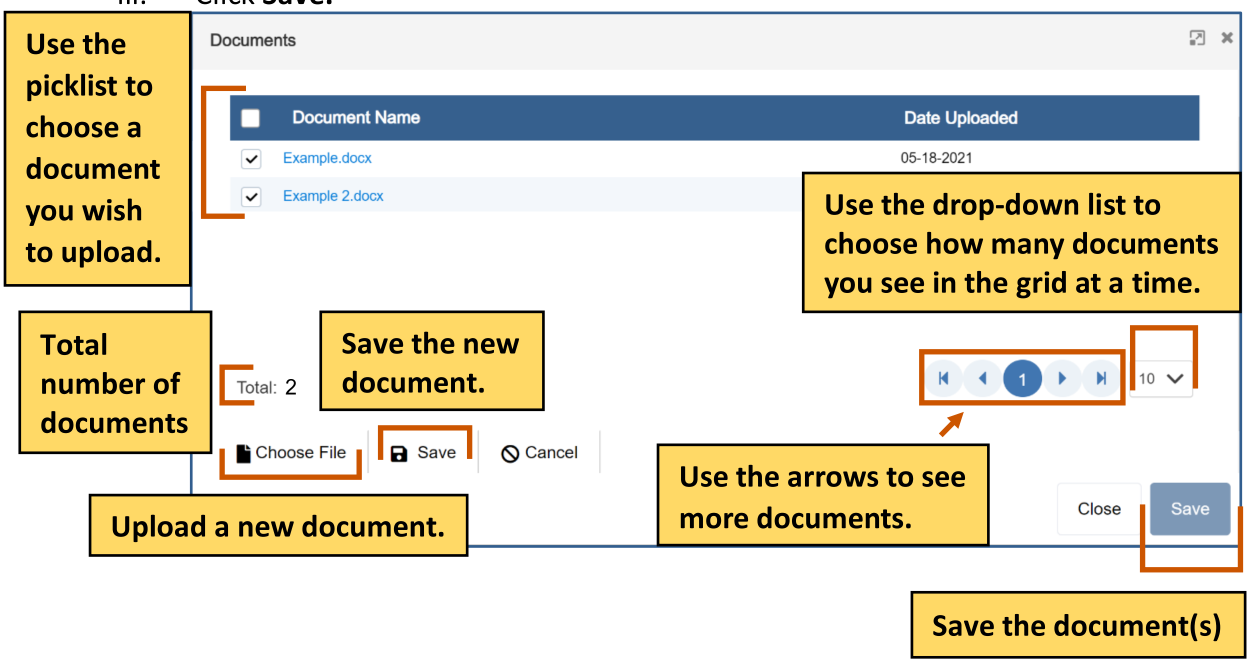


ii. Choose from the picklist.
Or
Upload a new document by clicking **Choose File** .

i. **Upload the document.**

ii. Click **Save** .

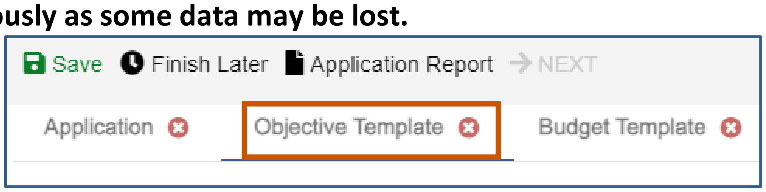
iii. Click **Save.**



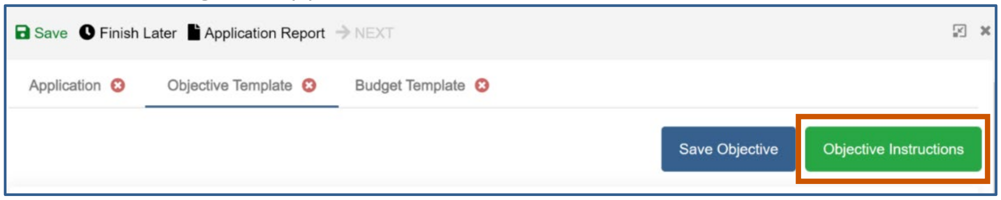
Complete the Objective Template:

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.**



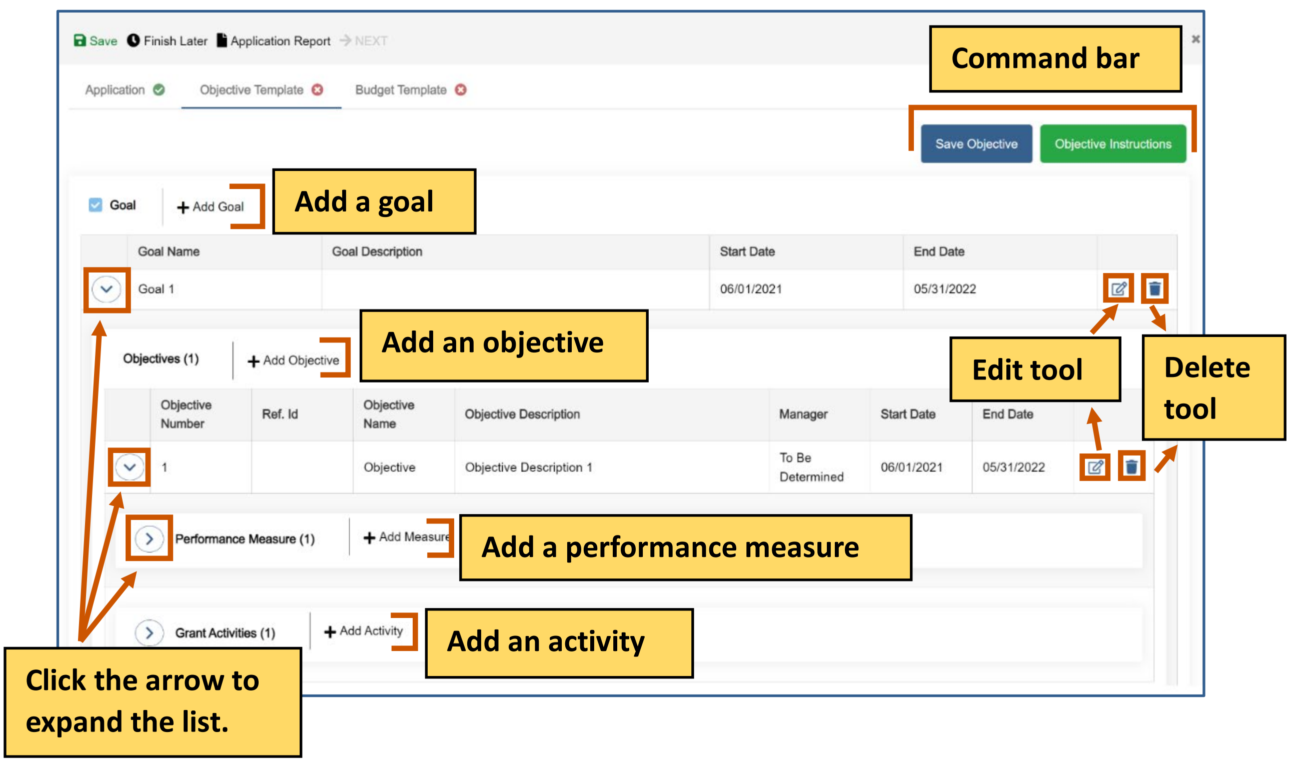
b. Click Objective Instructions to see how to complete the template. The Objective Instructions dialog box appears.



c. Click **Maximize** to maximize the window.
Or
Click **Close** to close the dialog box.

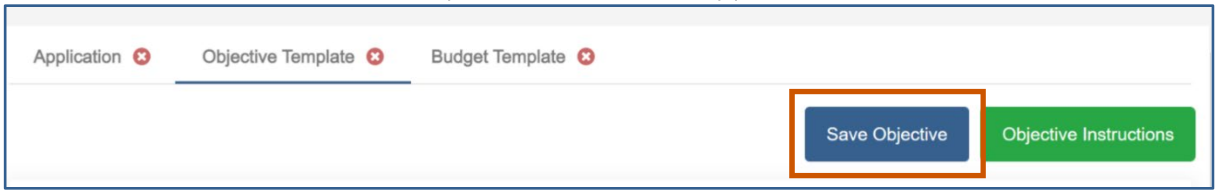
d. Add in the goals if necessary. If goals are required, each objective must be associated with a goal.
Note: The Goal radio button only appears if the option has been selected when the announcement was made.

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.

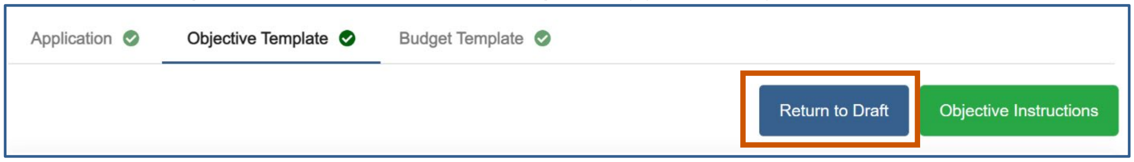


Objective Template Command Bar	Description
Save Objective	Saves the objectives and locks the Objective Template.
Objective Instructions	Display the instructions on how to complete the Objective Template.

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

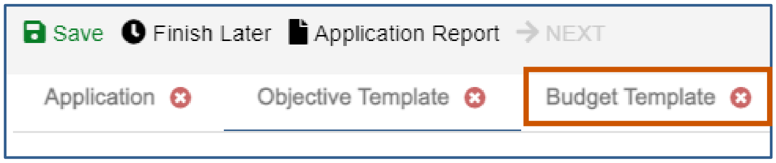


g. **Optional:** You can unlock the Objective Template again if you need to make change.
   i. Click **Return to Draft.** The Objective Template is locked, and you can edit it. You can go in and out of draft during the application process.

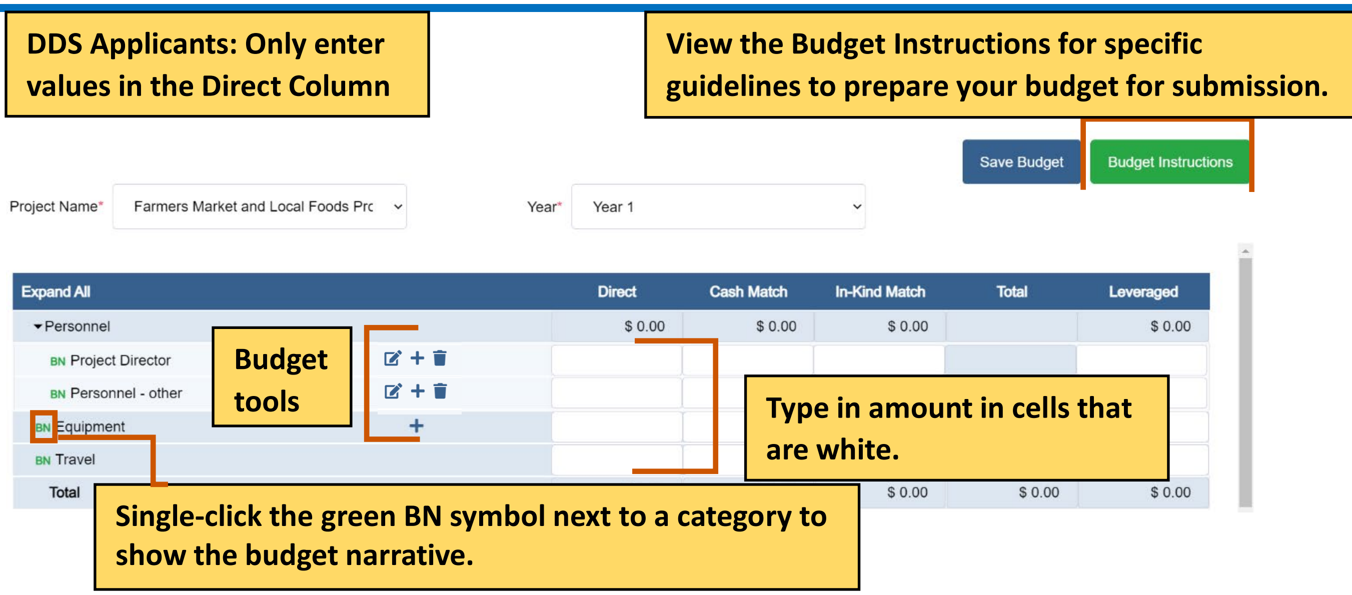


Complete the Budget template.
ⓘ **Note:** There are different design setups for the budget. The items you can add/change depend on the properties selected when the announcement was made. For more information, see Budget Tools.

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.



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

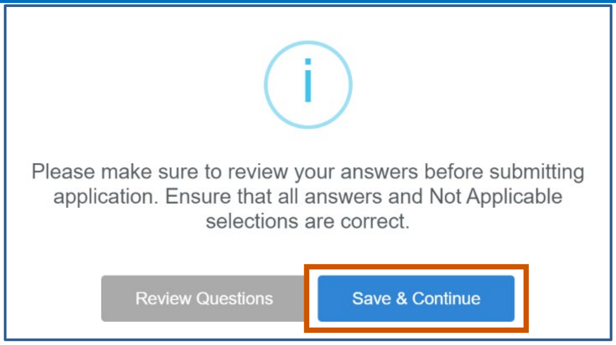
e. **Optional:** You can unlock the Budget Template again if you need to make change.

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.

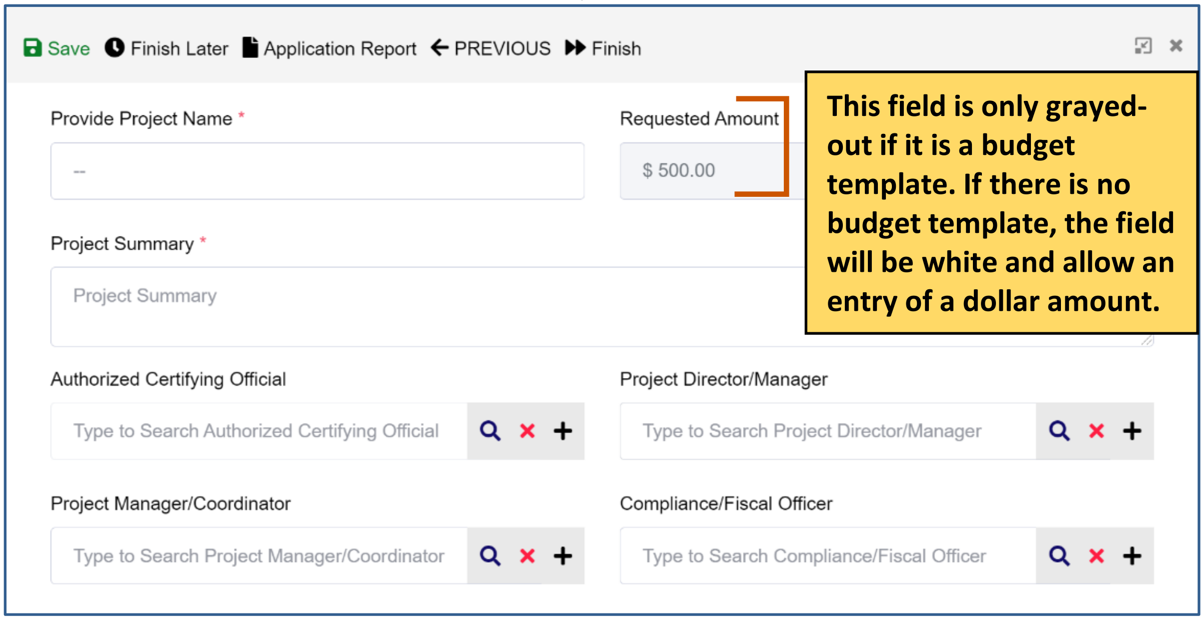
Finish the application process

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.**

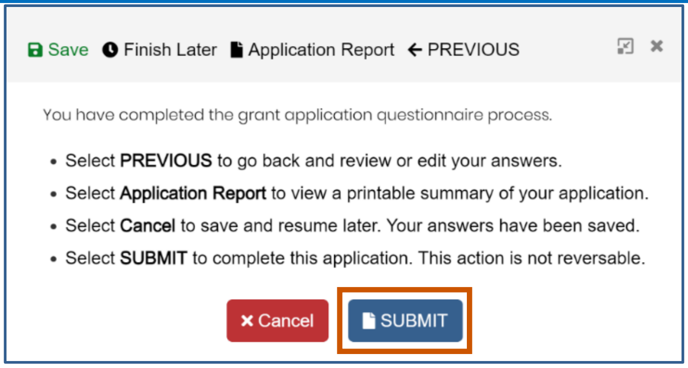


9. Fill in the necessary fields.
   Note: The red asterisks indicate required fields.

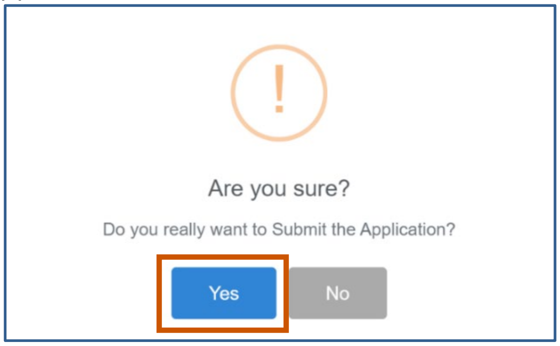


10. Click **Finish**. The Submission page appears telling you how to go back and review your answers, how to view the application report, how to save and resume the application later, and how to submit the application.

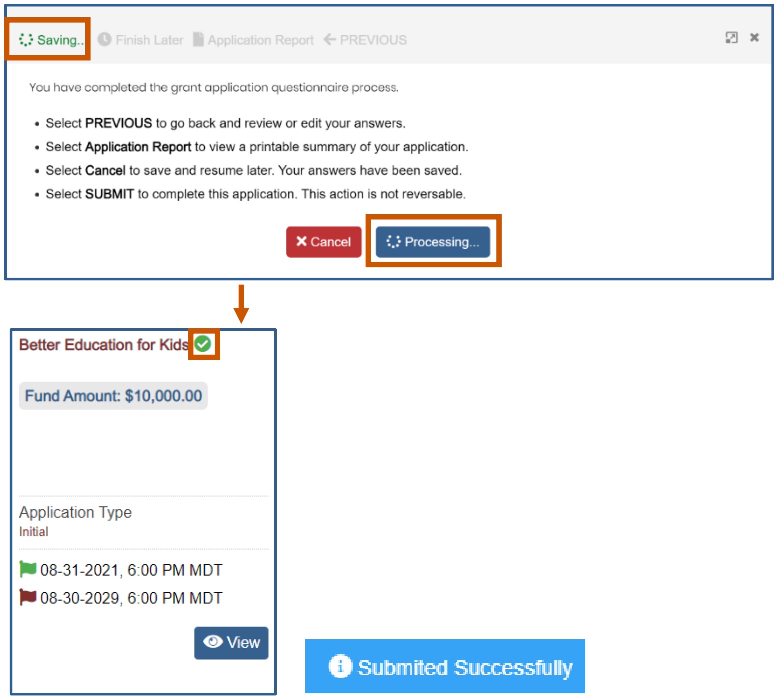
11. Click **Submit**. A popup appears asking if you are sure you want to submit the application.



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

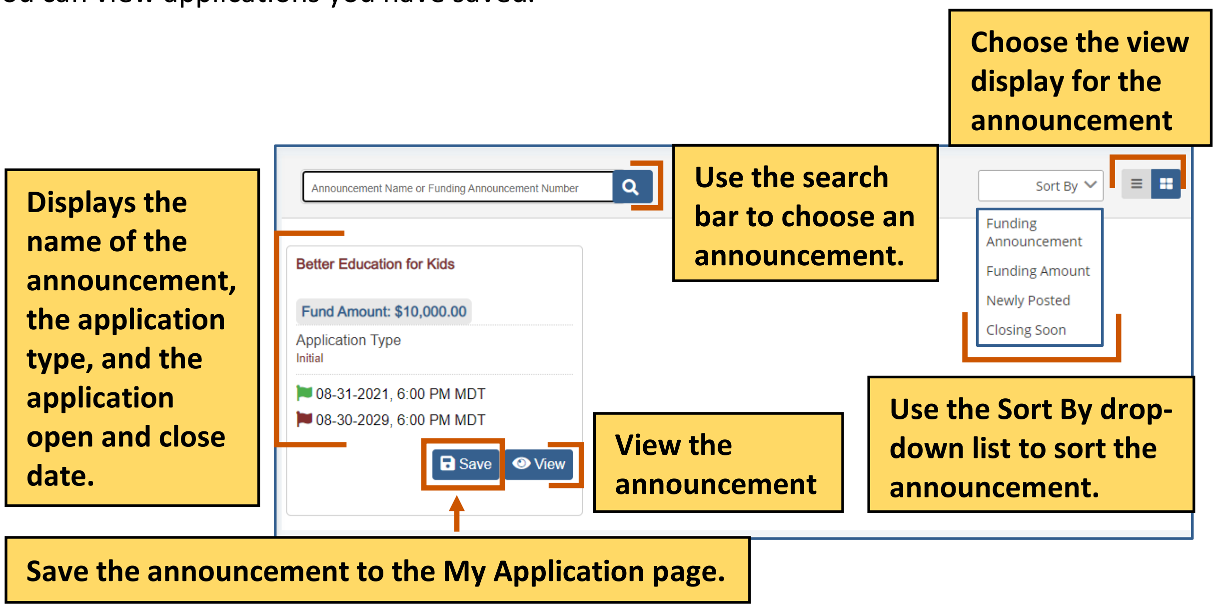


The Submit button turns into Processing with a spinning wheel. The Save button at the top also has a spinning wheel. Wait until the application has been submitted. There is a green checkmark next to the announcement indicating you have applied. A blue information popup also appears indicating that the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



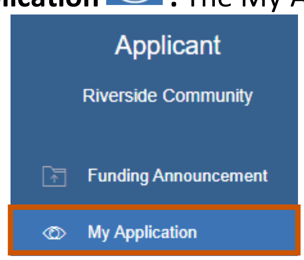
My Application

You can view applications you have saved.

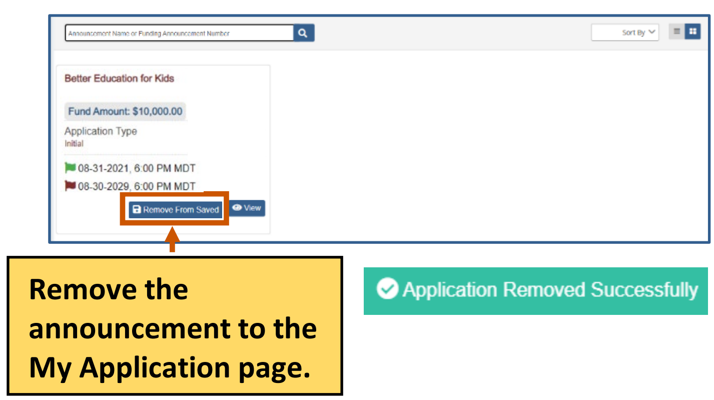


Remove an Application from Saved

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

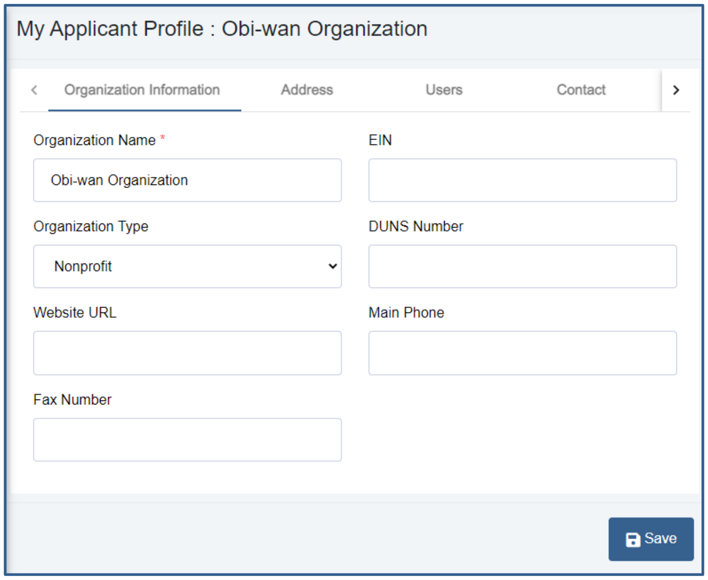


2. Click **Removed From Saved** . The announcement is removed from the screen, and a green Application Removed Successfully popup appears at the bottom right of the screen.

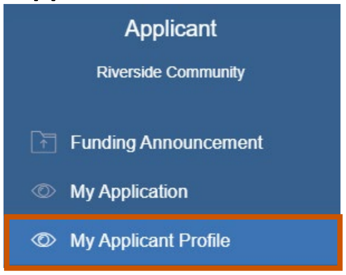


My Applicant Profile

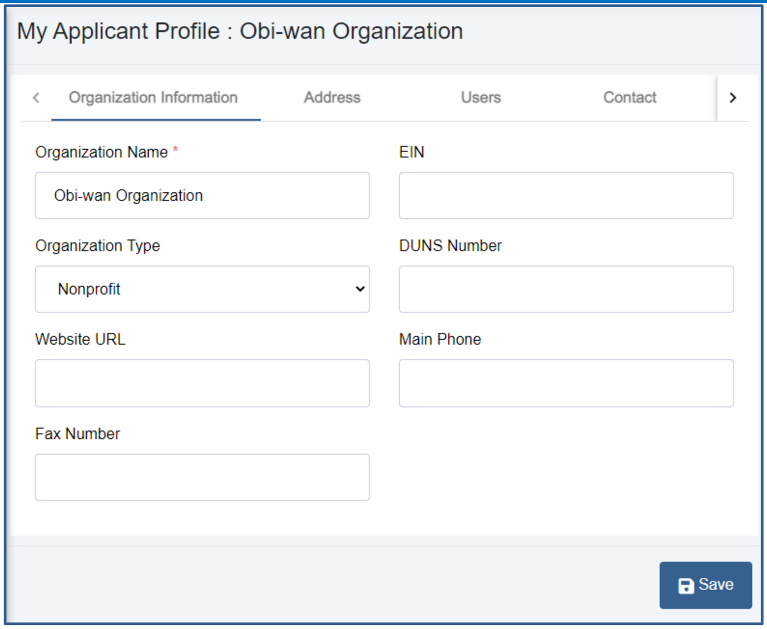
Once an applicant has created a user account, they may navigate to their Applicant Profile. The Applicant Profile and related pages are a fully customizable tool to enhance the user's applications. *My Applicant Profile* is a tool designed to enhance a user's application. Here, applicants may add additional 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.



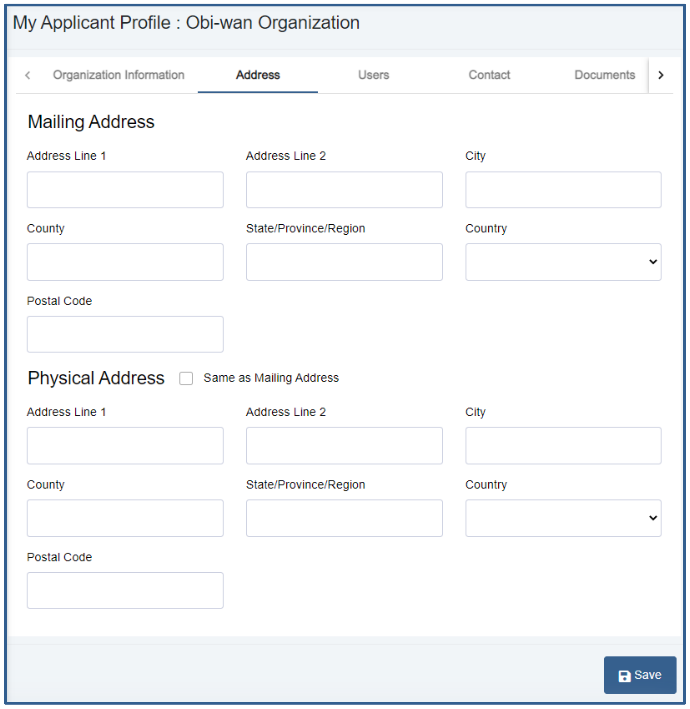
1. From the site map, click **My Applicant Profile** **.** The Applicant Profile page appears.



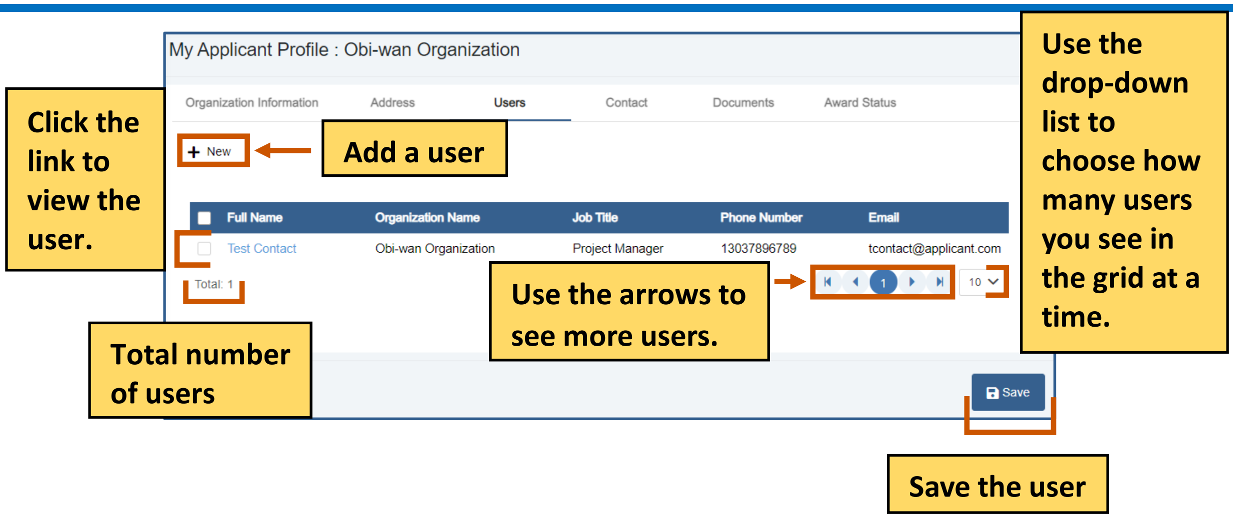
2. On the Organization Information tab, fill in the necessary fields.
   Note: The red asterisks indicate required fields. The Address, Users, Contact, Documents, and Award Status tabs appear only after you save the organization information. Make sure to save each tab information as you go.



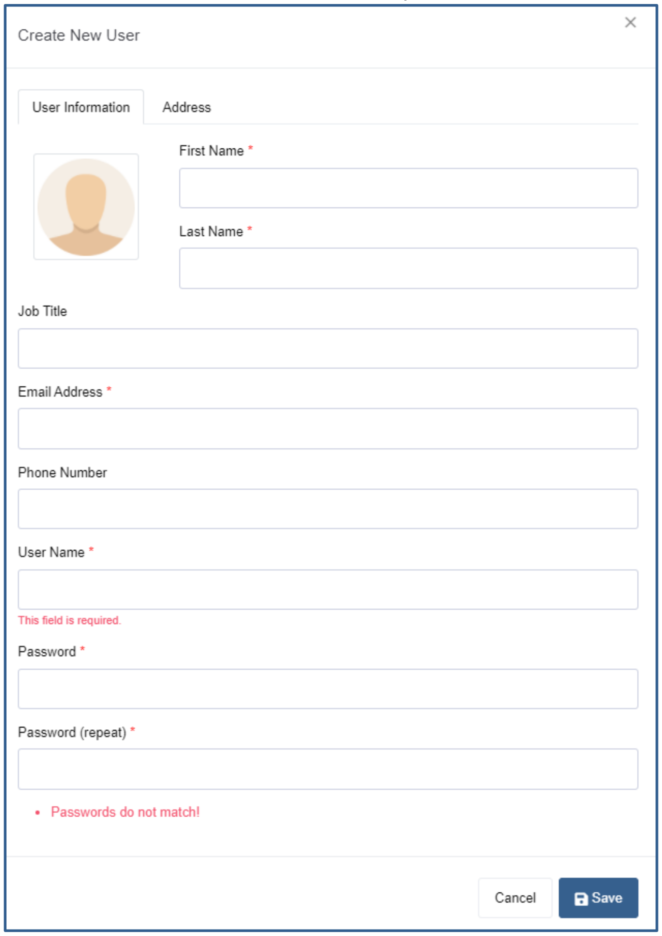
3. **Optional:** On the Address tab, fill in the necessary fields.



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.

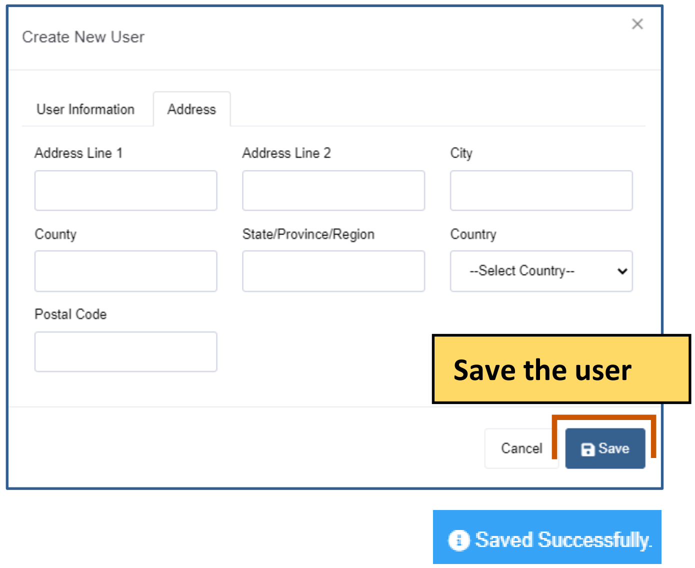


b. On the User information tab, fill in the necessary fields.
ⓘ **Note:** The red asterisks indicate required fields.

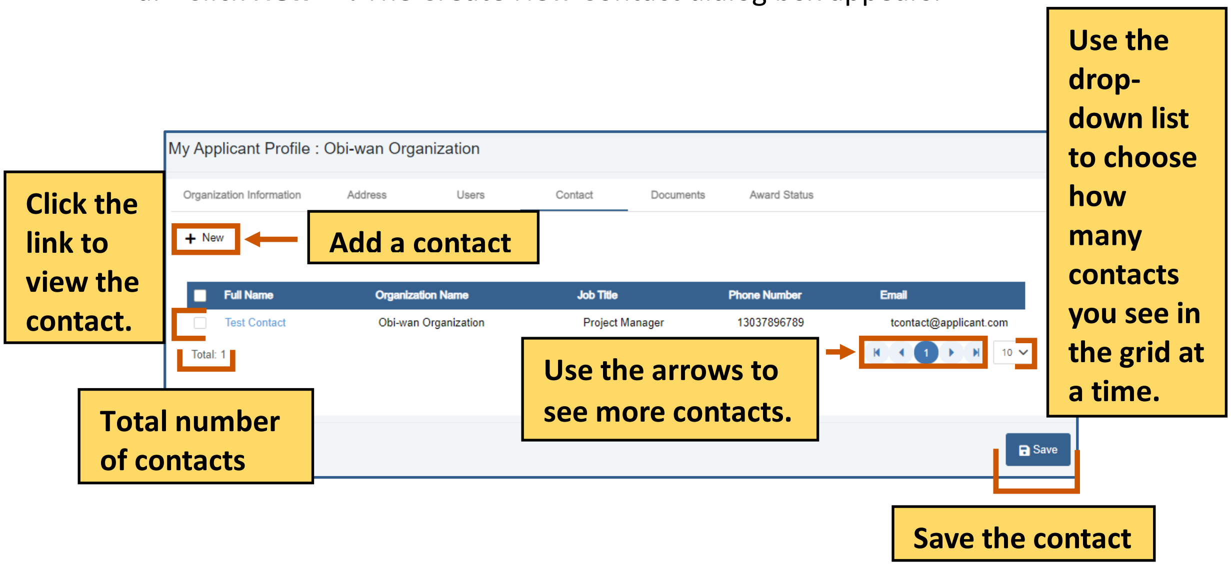


c. **Optional:** On the Address information tab, fill in the necessary fields.

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.

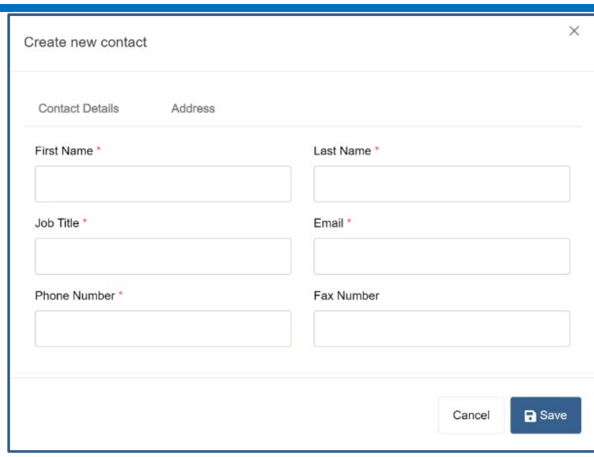


5. **Optional:** On the Contact tab, add a contact. The user you registered with is automatically a contact.
   a. Click **New +**. The Create New Contact dialog box appears.

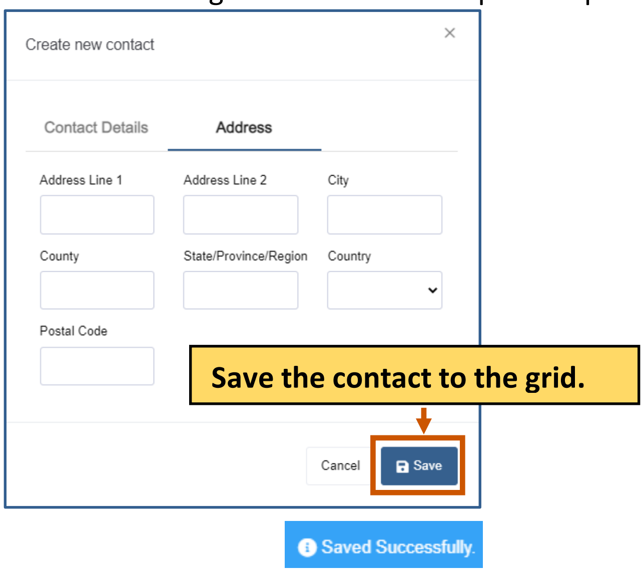


   b. On the Contact Details, fill in the necessary fields.

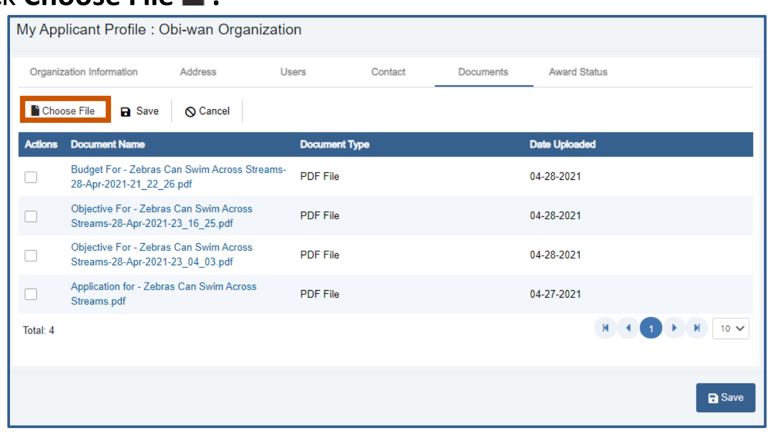
ⓘ **Note:** The red asterisks indicate required fields.



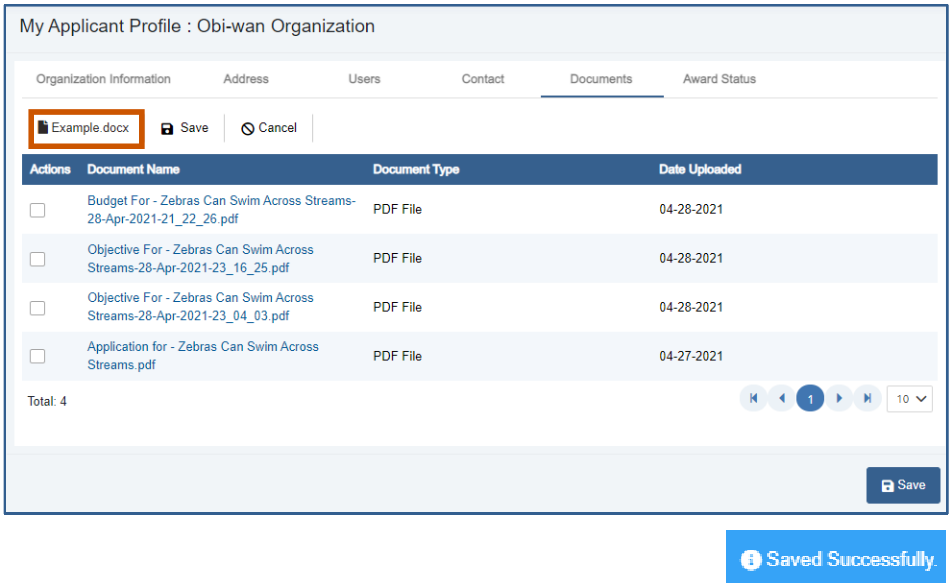
c. **Optional:** On the Address Details, fill in the necessary fields.
d. Click **Save** to save the contact to the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 8a-8d for each contact.



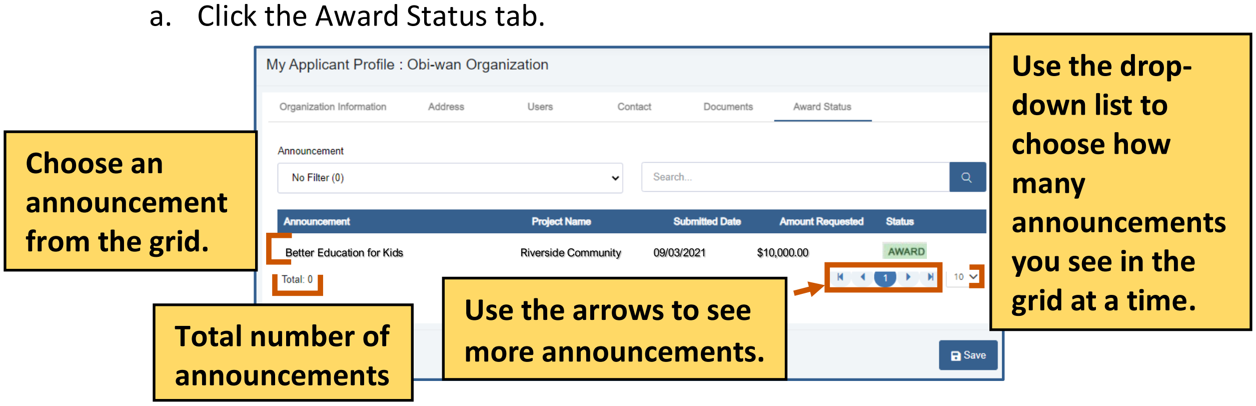
6. **Optional:** On the Document tab, add a document.
    a. Click **Choose File** .



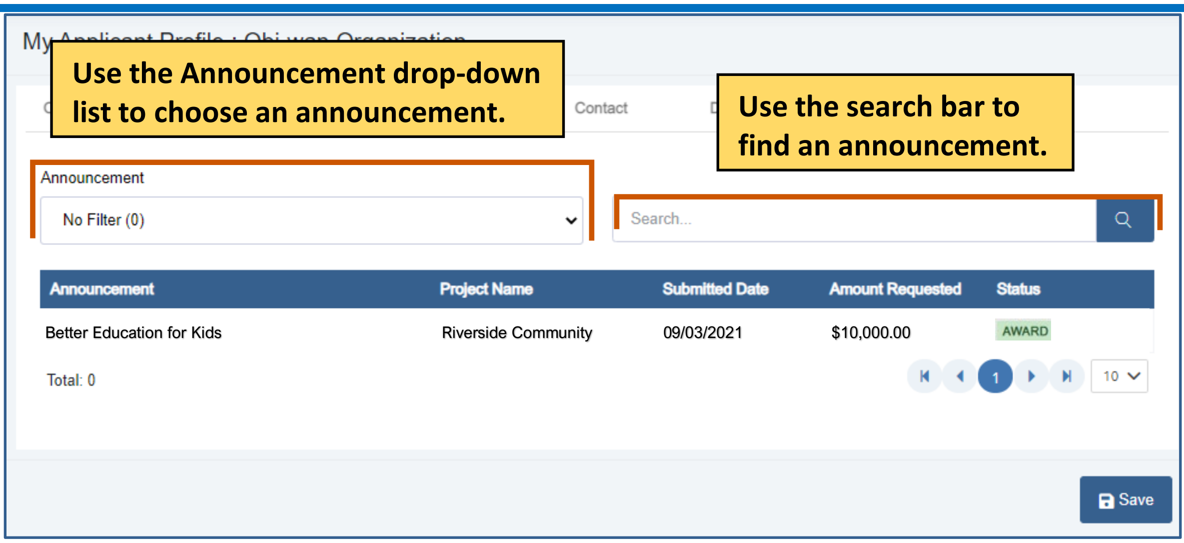
b. Upload the file. The name of the file replaces the Choose File button.
c. Click **Save** to save the document to the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 6a-6c for document.



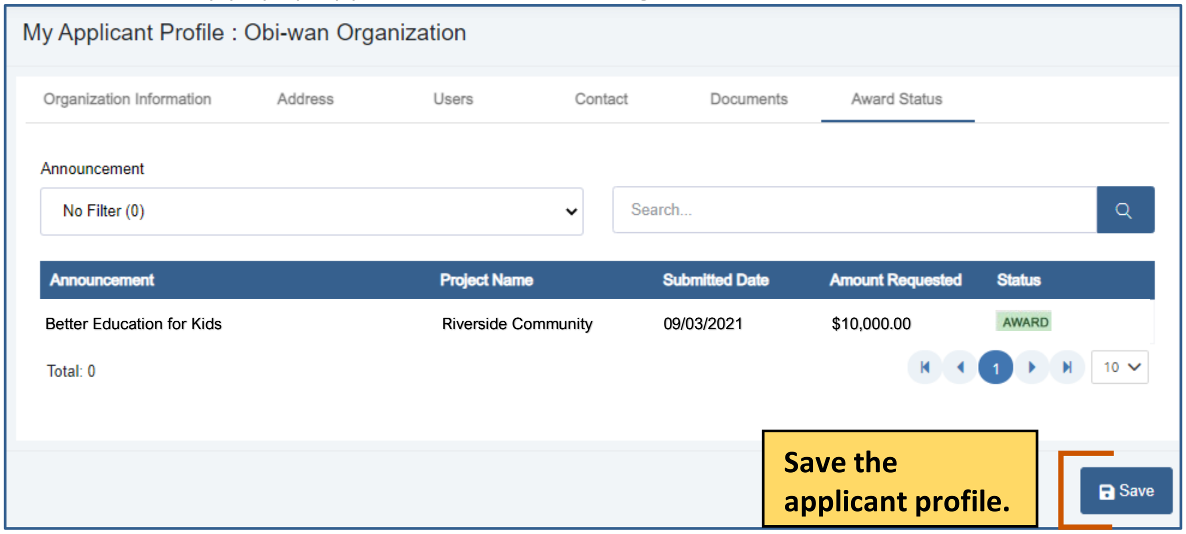
7. **Optional:** Check the status of an award.
   a. Click the Award Status tab.



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

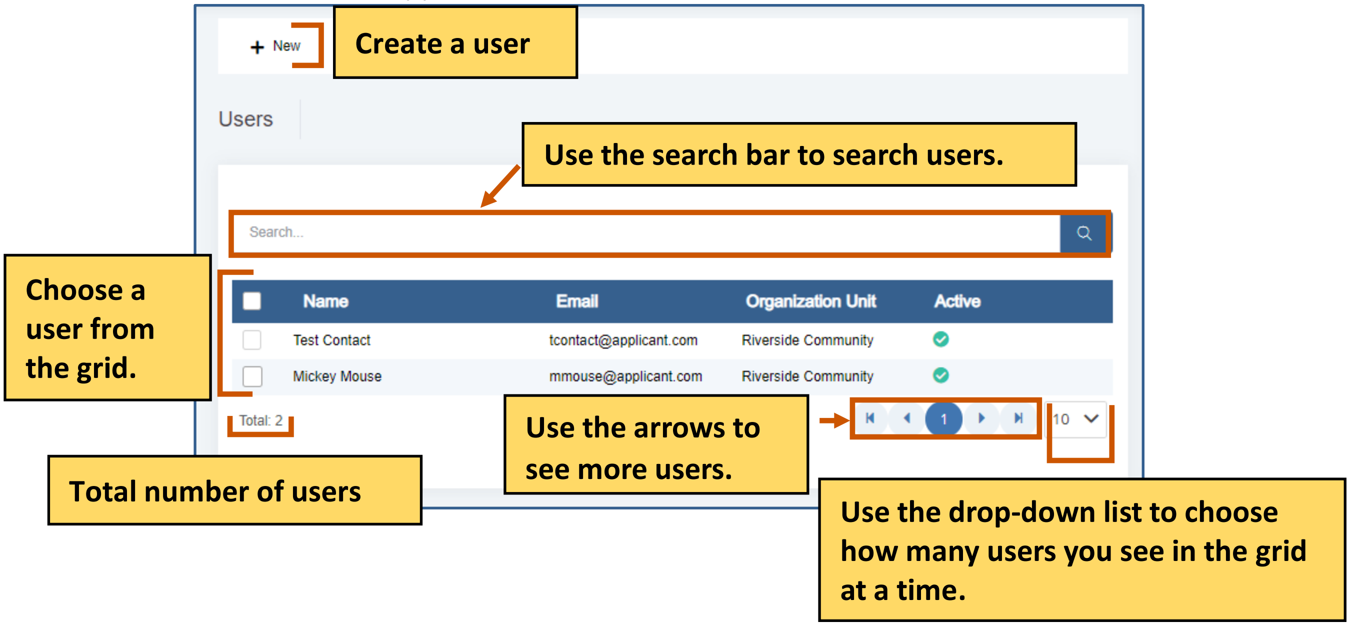


8. Click **Save** to save the applicant profile and close the dialog box. A blue Saved Successfully popup appears at the bottom right of the screen.



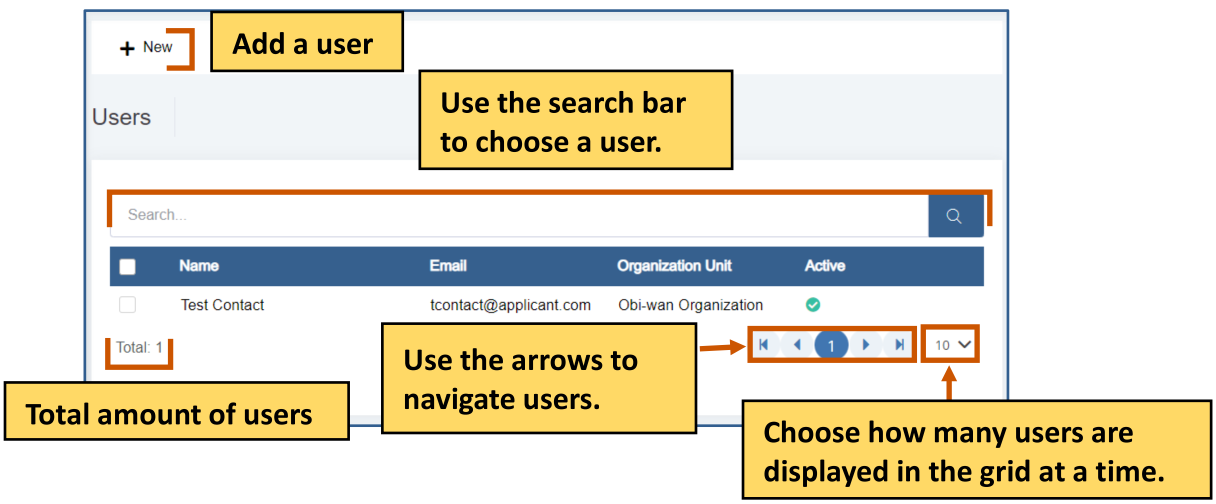
Users

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

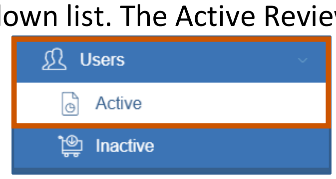


Active Users

You can view active users.



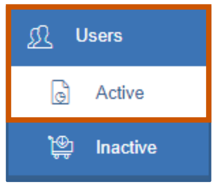
1. From the site map, click **Review Management** and click **Review Panel** **.** Choose **Active** from the drop-down list. The Active Reviewers screen appears.



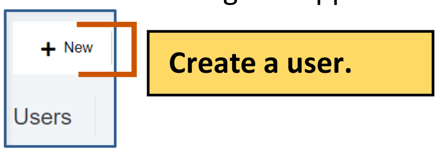
Create a User

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

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



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

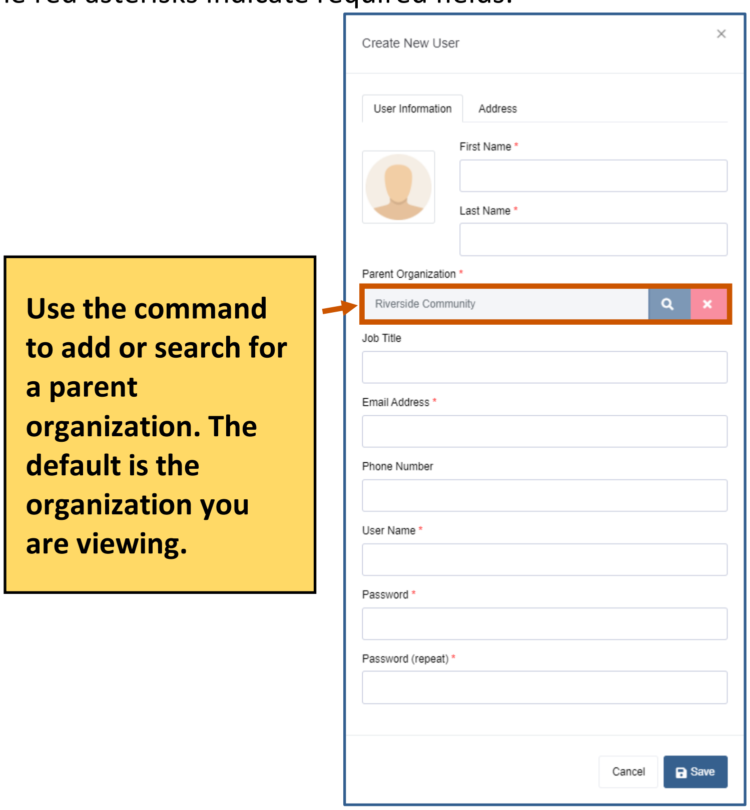


Under the Active column:

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

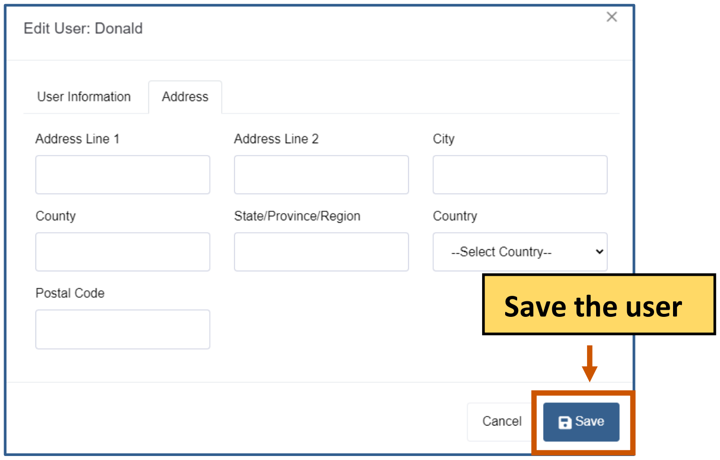
3. On the User information tab, fill in the necessary fields.

   Note: The red asterisks indicate required fields.



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

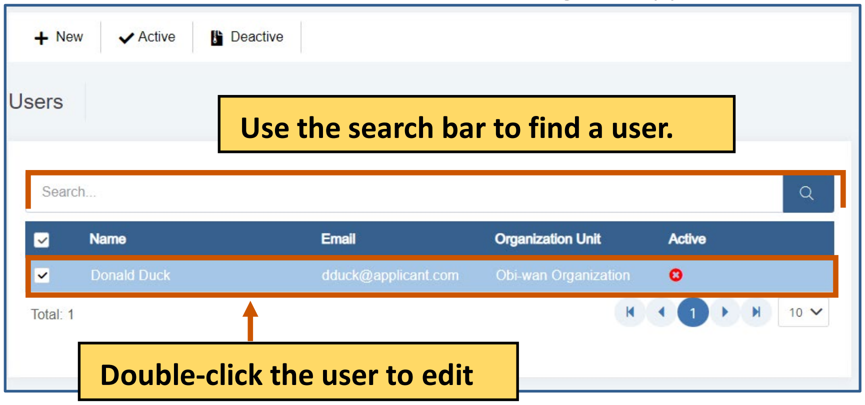
Note: The red asterisks indicate required fields.



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.

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.



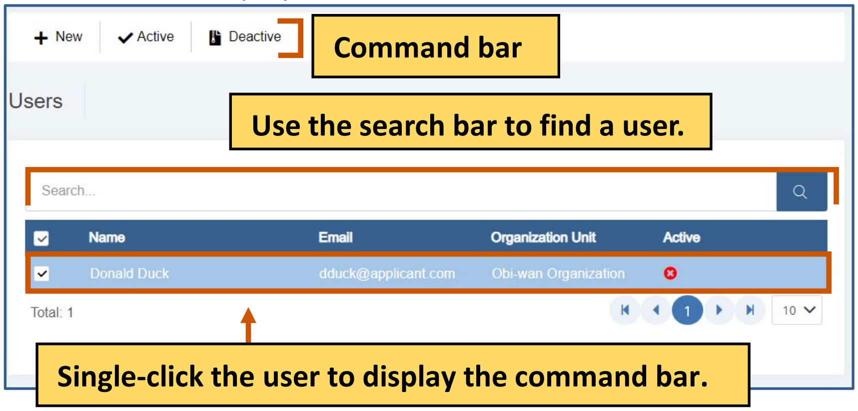
3. Edit the necessary fields for each tab.
   ⓘ **Note:** The red asterisks indicate required fields.

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.

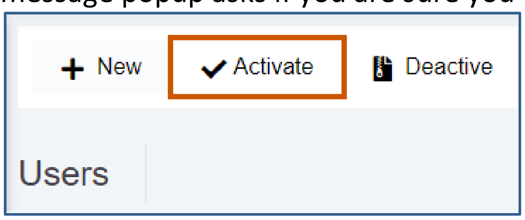
Activate a User

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

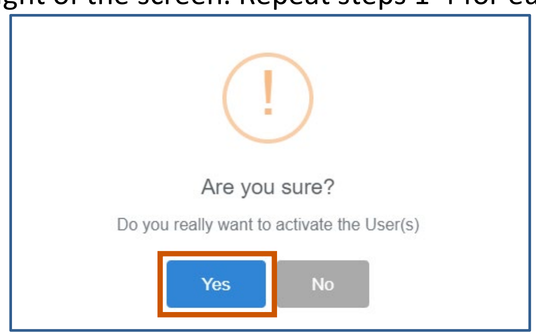
1. **Optional:** Use the search bar to find a user.
2. **Single-click** the user to display the command bar.

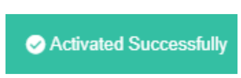


3. Click **Activate** ✔. A message popup asks if you are sure you want to activate the user.



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.

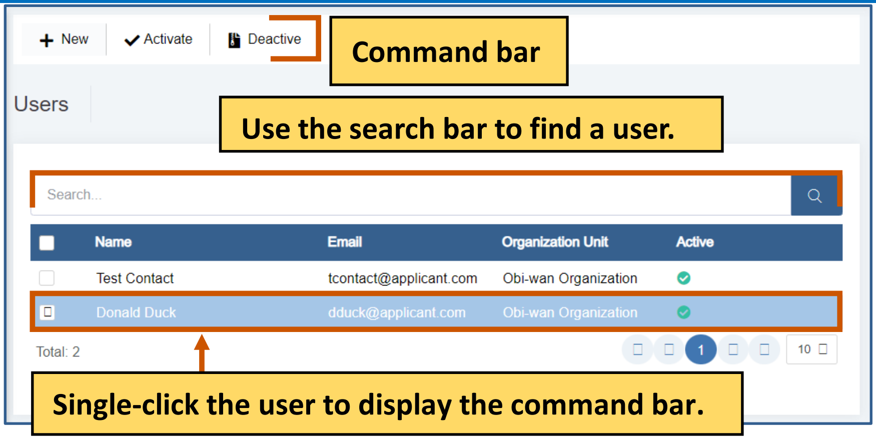




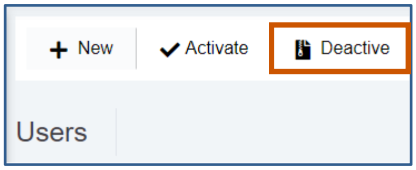
Deactivate a User

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

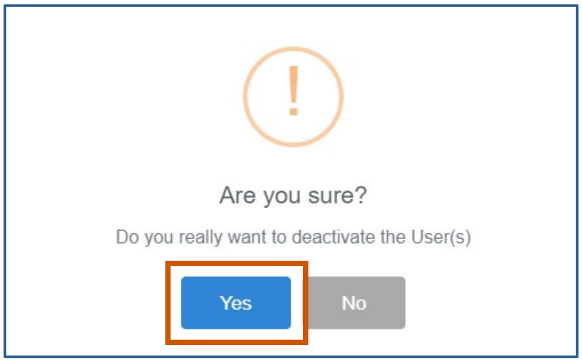
1. **Optional:** Use the search bar to find a user.
2. **Single-Click** the user to display the command bar.



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

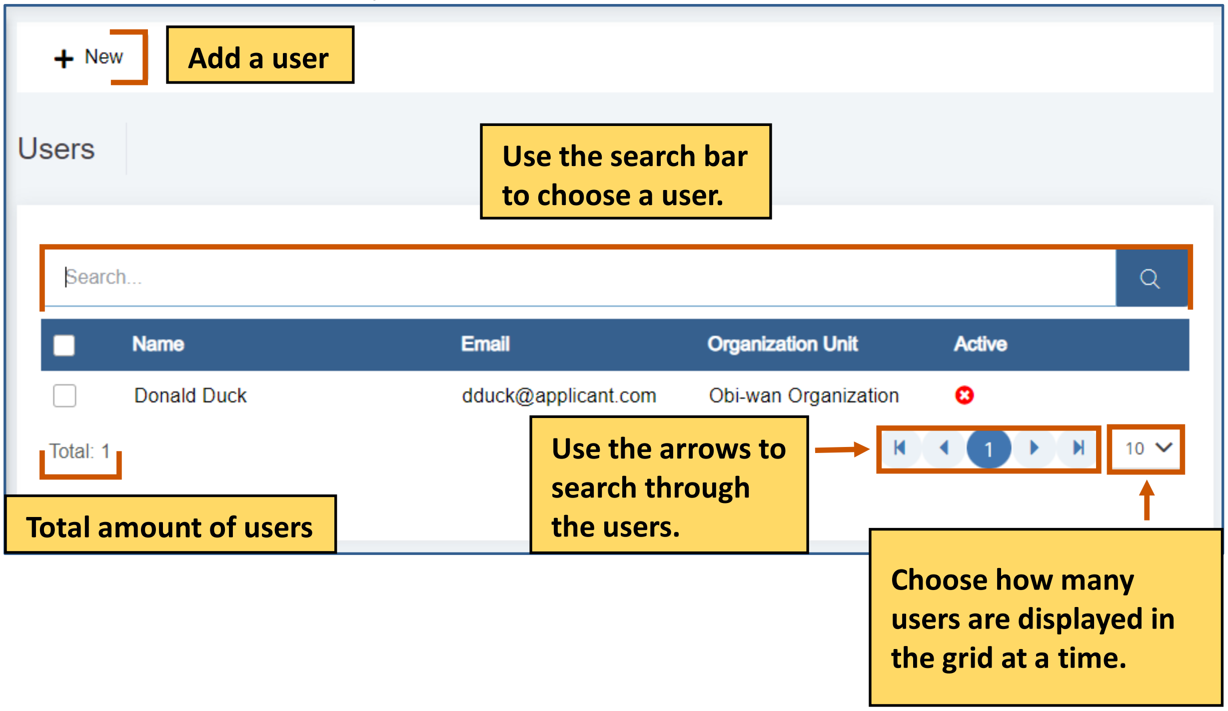


4. Click **Yes.** The reviewer is deactivated. A green Activated Successfully popup appears at the bottom right of the screen.Repeat steps 1-4 for each reviewer you wish to deactivate.

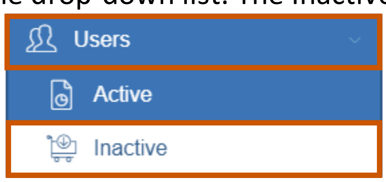


Inactive Users

You can view inactive review panels.

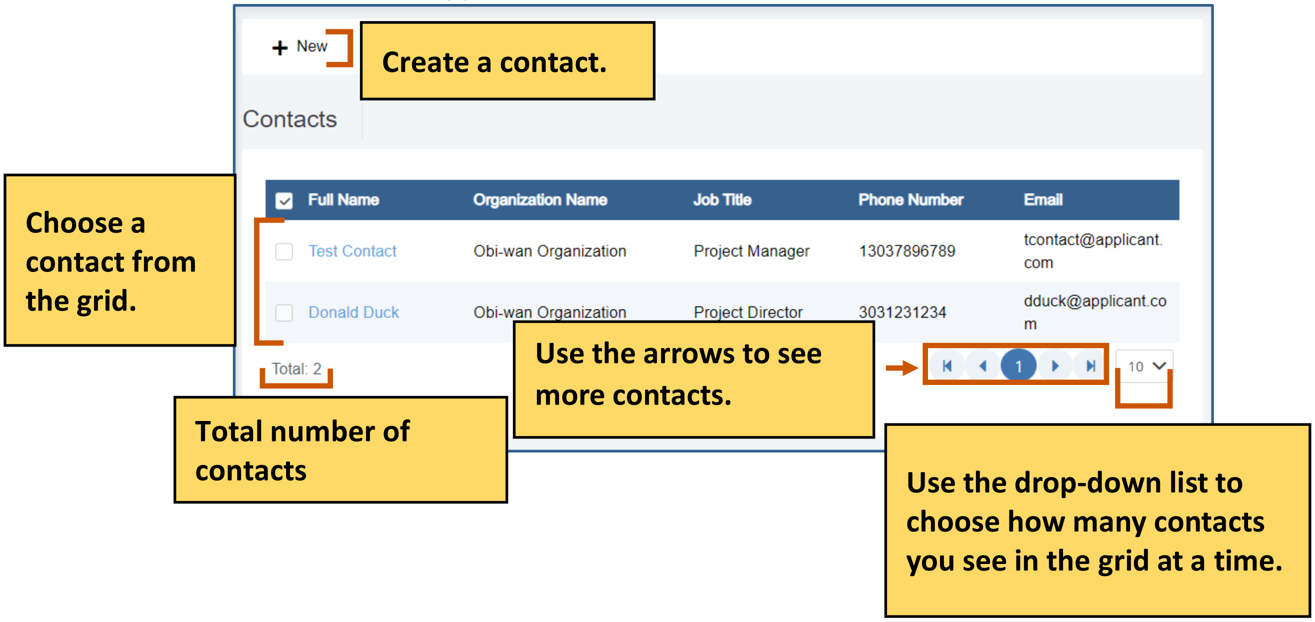


1. From the site map, click **Review Management** and click **Inactive** **.** Choose **Inactive** panels from the drop-down list. The Inactive Reviewers screen appears.



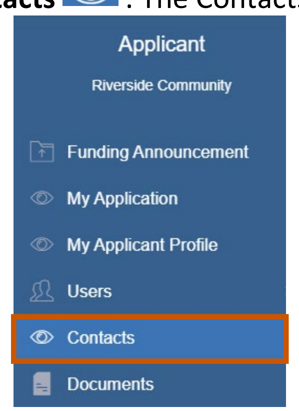
Contacts

View the contacts related to the application.

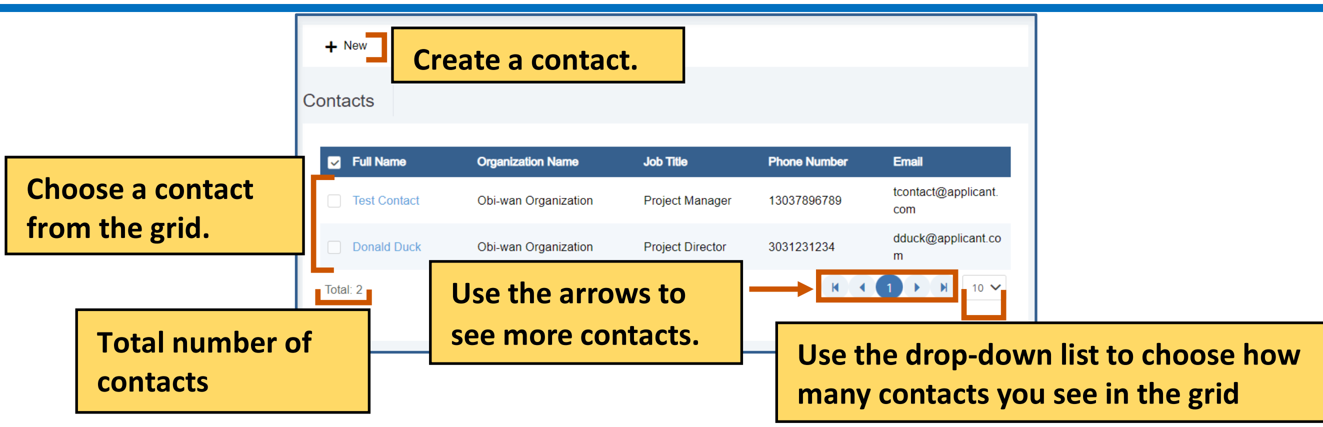


Add a Contact

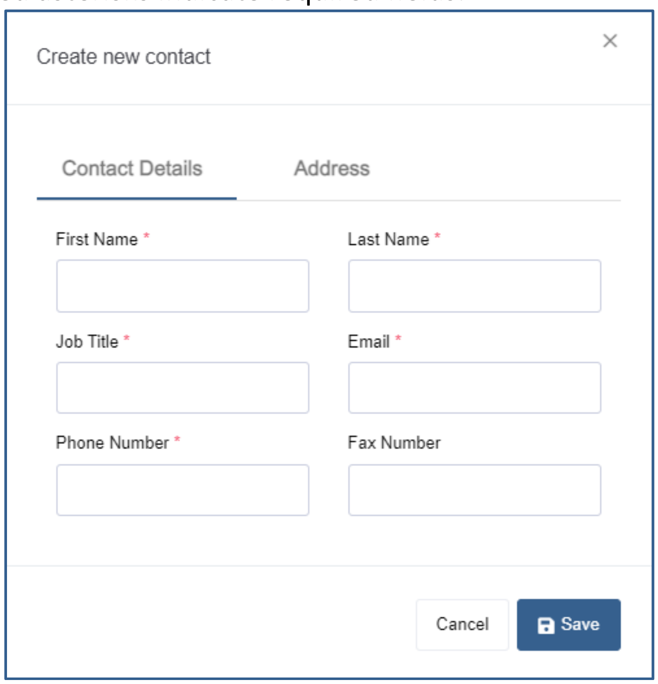
1. From the site map, click **Contacts** . The Contacts for Applicant page appears.



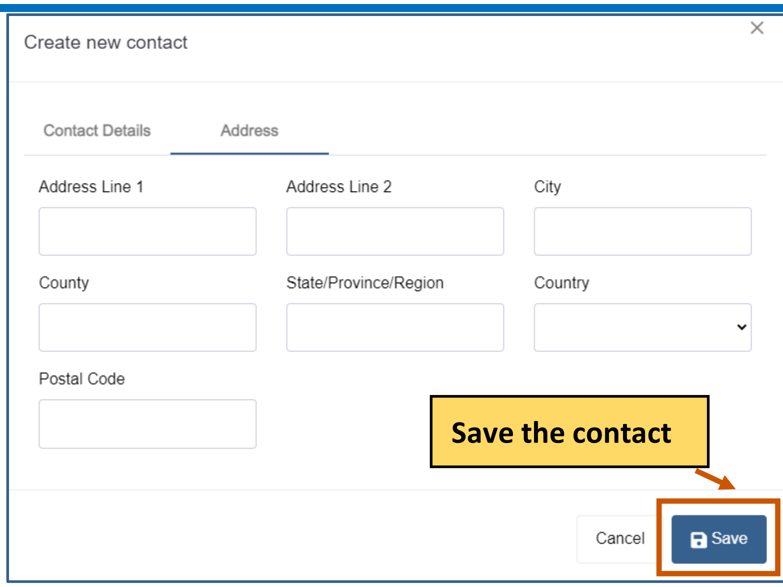
2. Click **New** **+** **.** The Create New Contact dialog box appears.



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

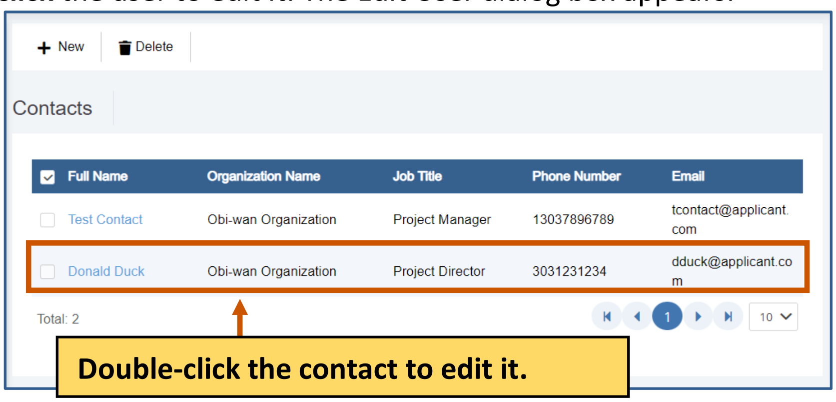


4. **Optional:** On the address tab, fill in the necessary fields.
   ⓘ **Note:** The red asterisks indicate required fields.
5. Click **Save** to save the contact They appear in the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 2-4 for each contact.



Edit a Contact

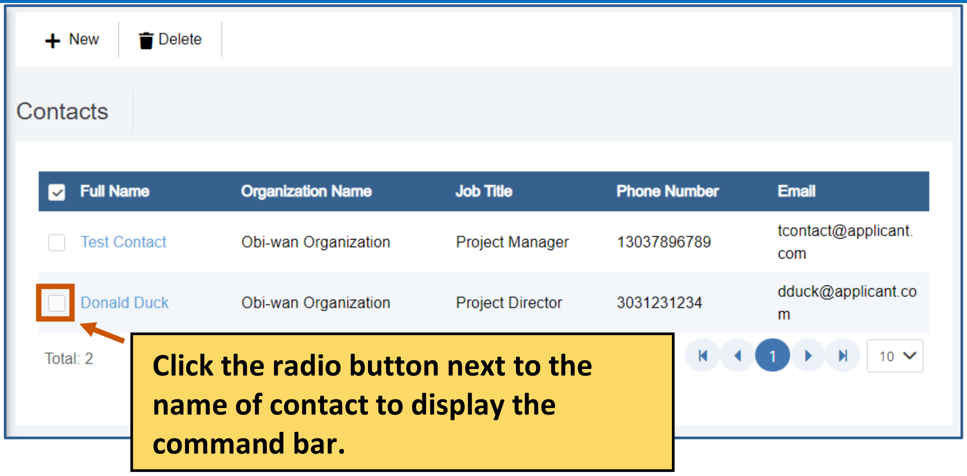
1. **Double-click** the user to edit it. The Edit User dialog box appears.



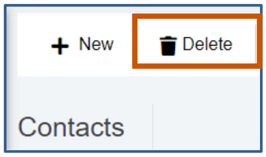
2. Edit the necessary fields for each tab.
   Note: The red asterisks indicate required fields.
3. Click **Save**. The changes are saved. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 1-5 for each council review you wish to edit.

Delete a Contact

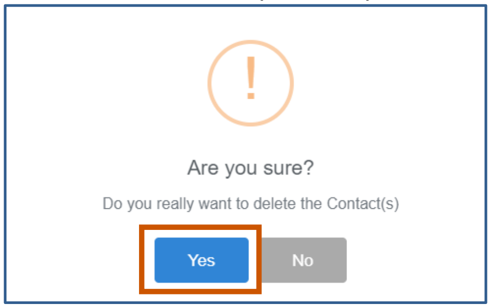
1. Click the radio button next to the name of contact to display the command bar.



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

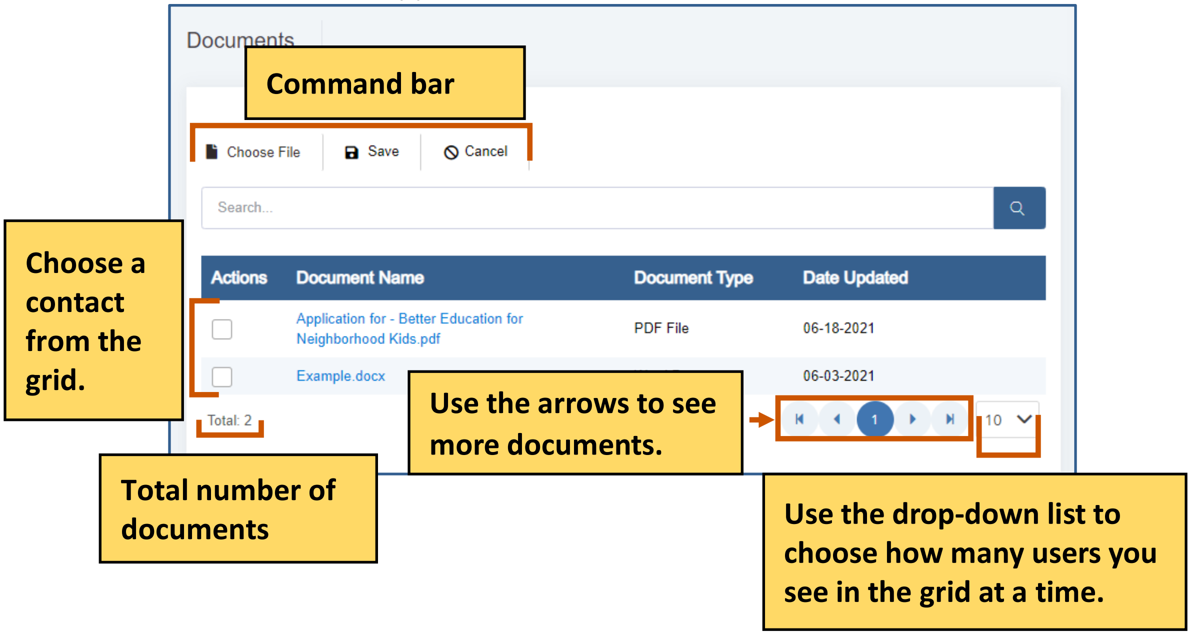


3. Click **Yes.** The contact is deleted. A green Deleted Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each contact you wish to delete.



Documents

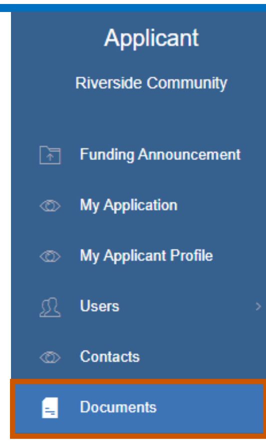
View documents related to the application.



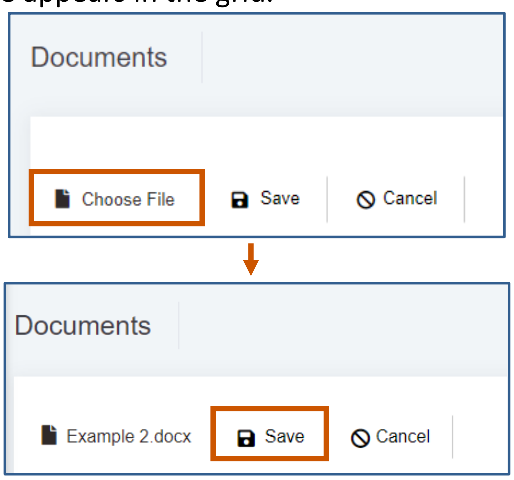
Command Options	Description
Choose File	Choose the file you want to upload.
Save	Save the file you want to upload
Cancel	If you choose a file you do not want to upload, you can cancel uploading the file.

Add a Document

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

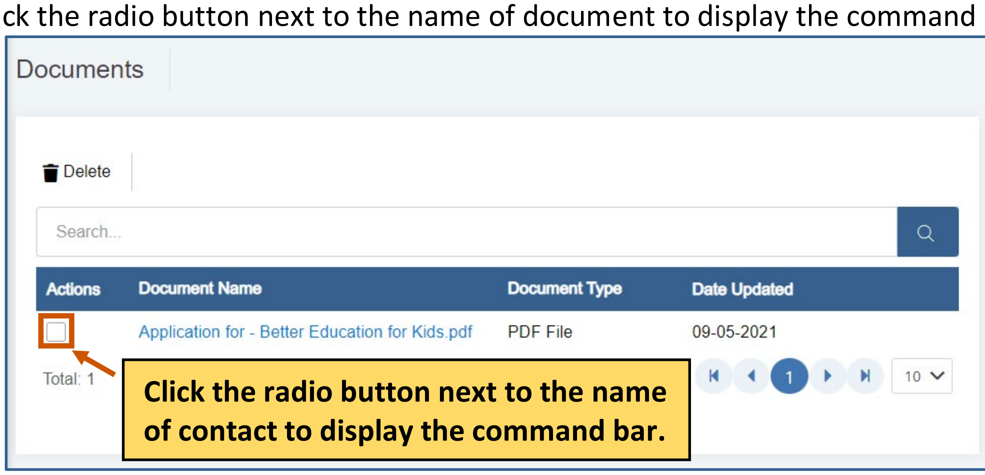


2. Click **Choose File** .
3. Upload the file.
4. Click **Save** . The file appears in the grid.

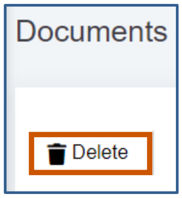


Delete a Document

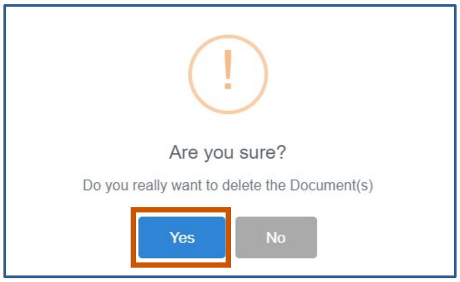
1. Click the radio button next to the name of document to display the command bar.



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



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

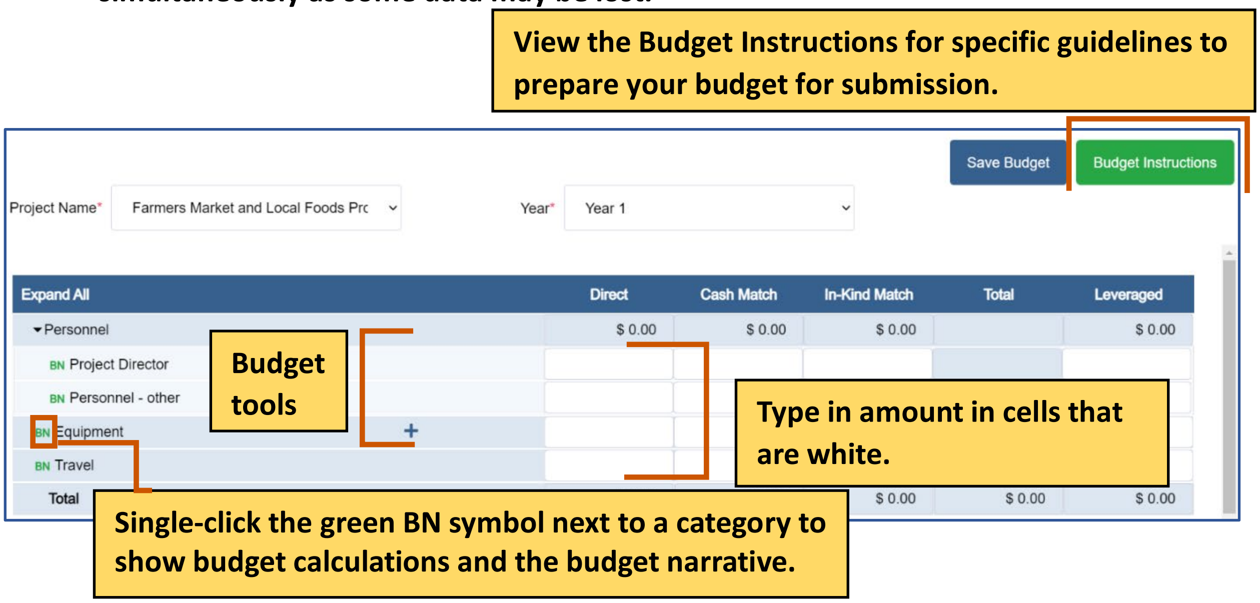


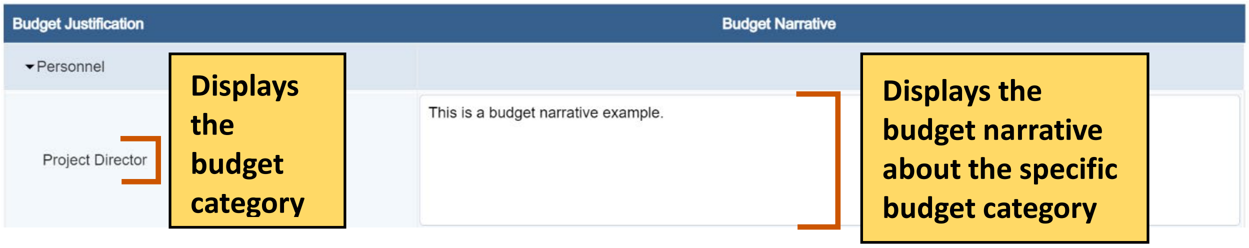
Budget Tools

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

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

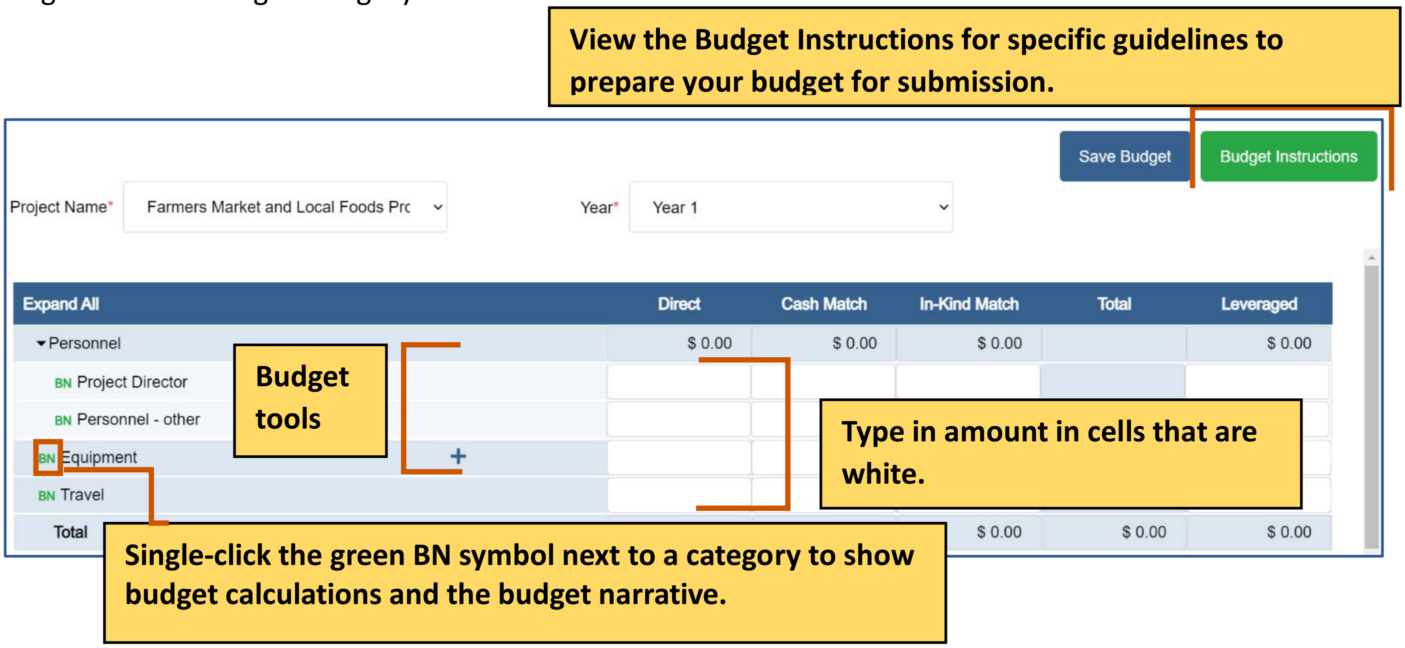
ⓘ **Note: Applications do not utilize live updates. Multiple users should not attempt to modify or save the same Question Answer, Objective Template, or Budget Template simultaneously as some data may be lost.**





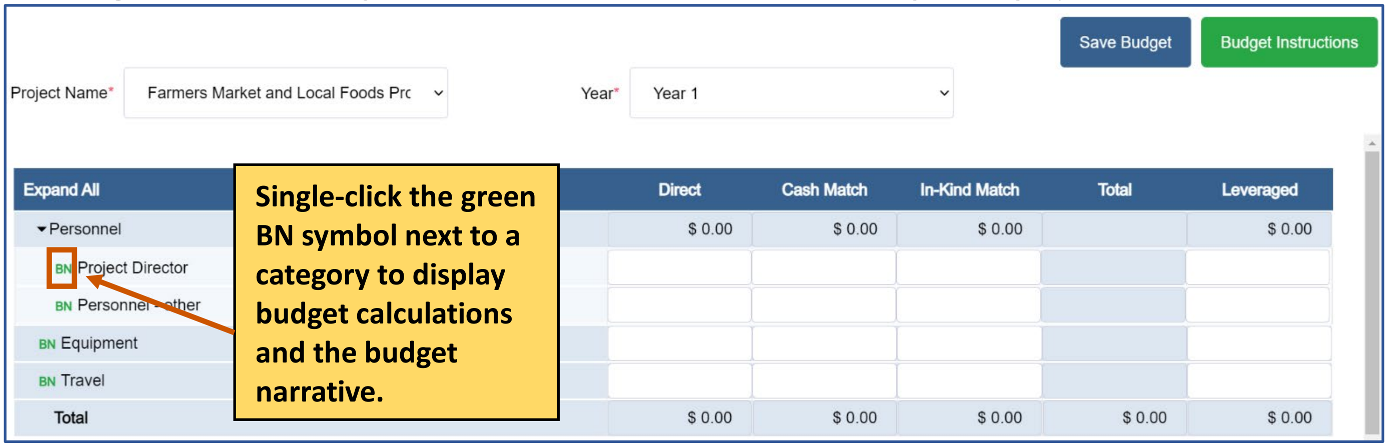
Adding Budget Values

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



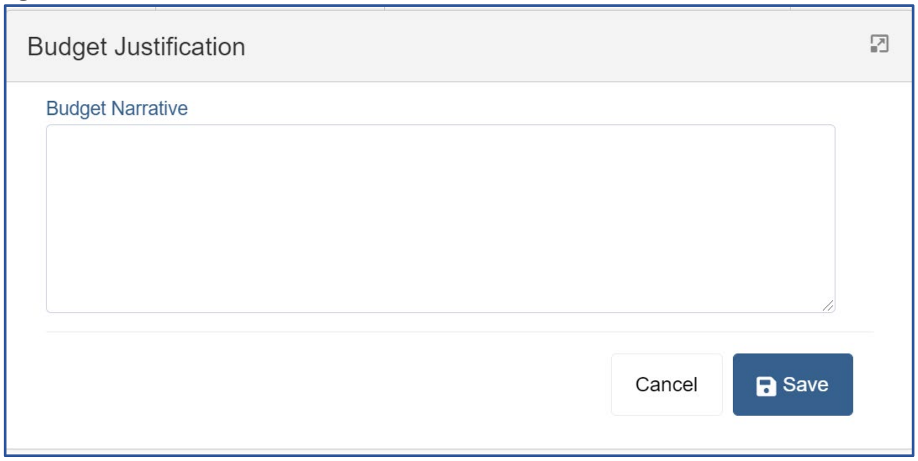
Adding Budget Narratives

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.

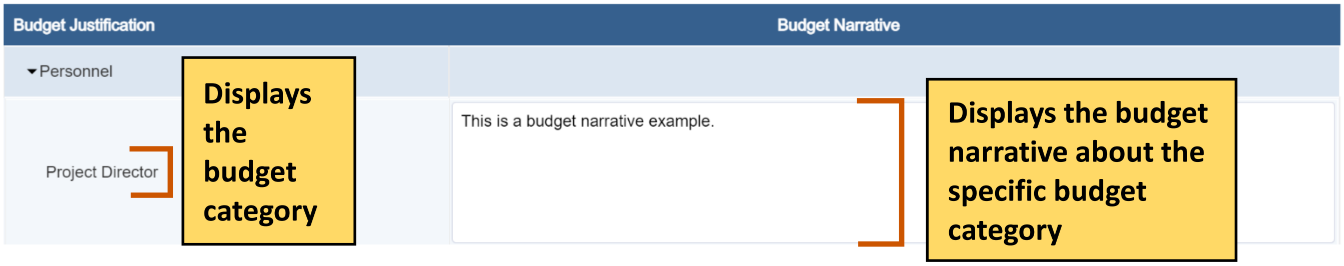


2. Add the appropriate information.

Example dialog box:



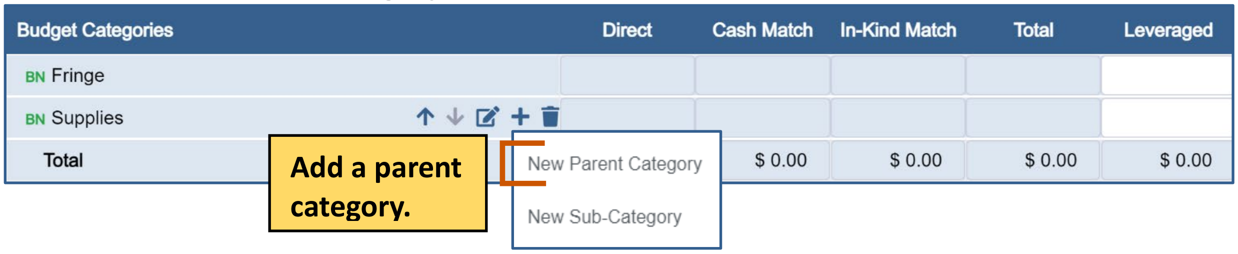
3. Click **Save** . The budget narrative appears in the table at the bottom of the page. Repeat steps 1-3 for each budget narrative.



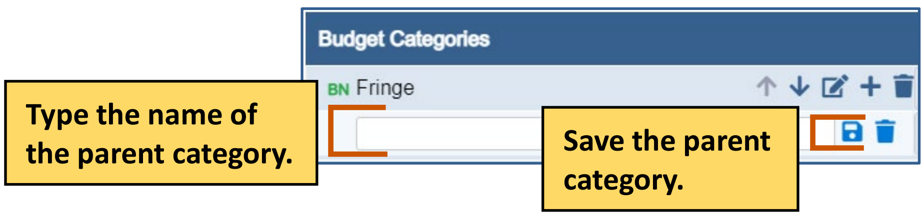
4. **Optional:** Click the BN next to the category to edit the information.

Adding a Parent Category

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

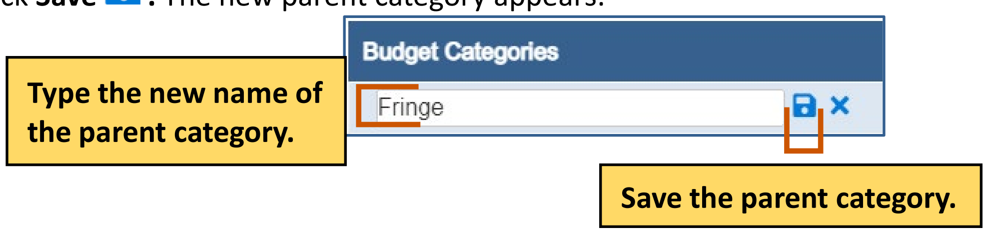


4. Type in the new name for the parent category.
5. Click **Save** .



Editing a Parent Category

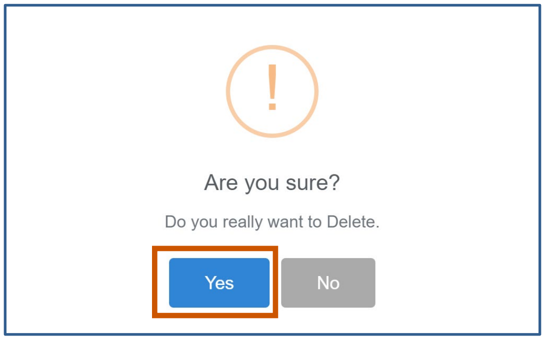
1. Hover over a parent category to display the budget tools.
2. Click **Edit** .
3. Type in the new name for the parent category.
4. Click **Save** . The new parent category appears.



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.

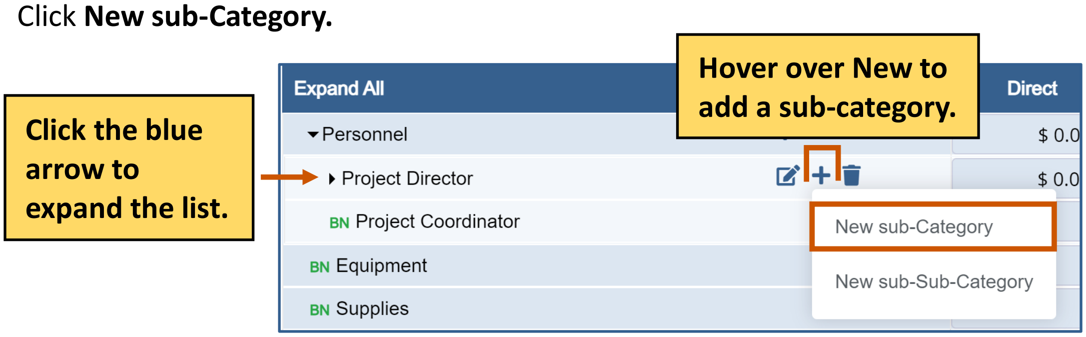


Move a Parent Category Up or Down on the Grid

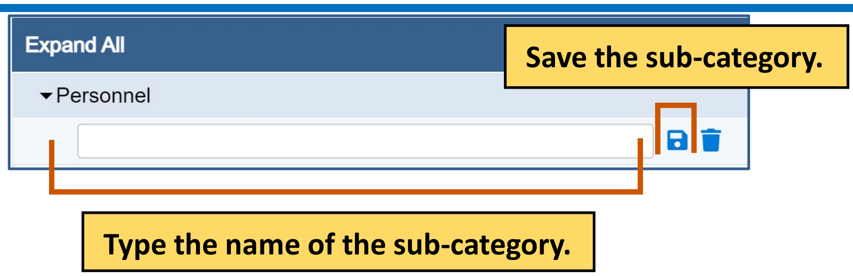
1. Hover over a parent category to display the budget tools.
2. Hover over **Move Up** to move the parent category up the grid**.**
   Or
   Click **Move Down** to move the parent category down the grid.

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.**

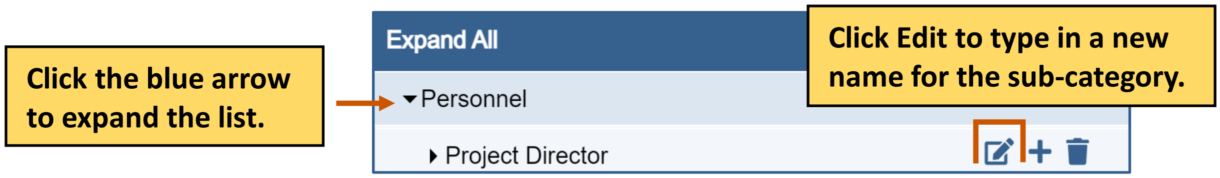


5. Type in the name of the sub-category.
6. Click **Save** **.** The sub-category is added to the grid.

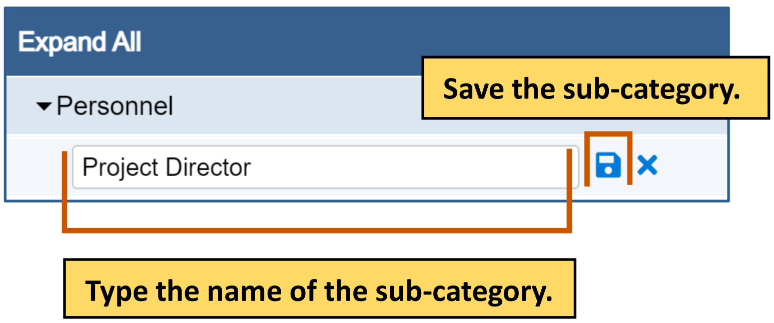


Editing a Sub-Category

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

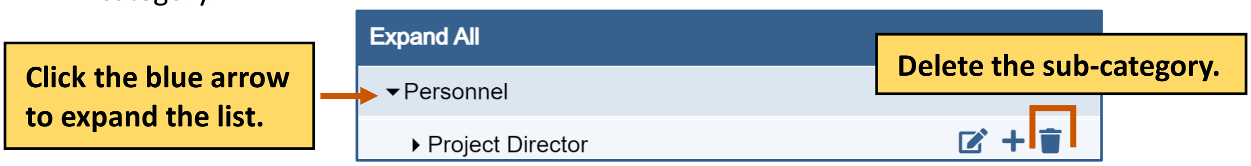


4. Type in the name of the sub-category.
5. Click **Save** .

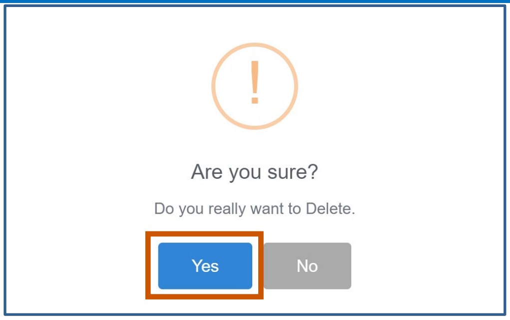


Deleting a Sub-Category

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

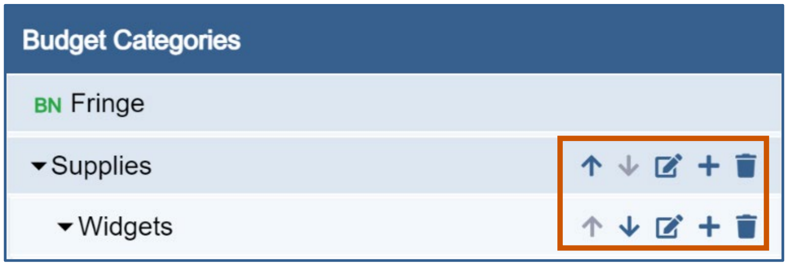


4. Click **Yes.** The sub-category is deleted.



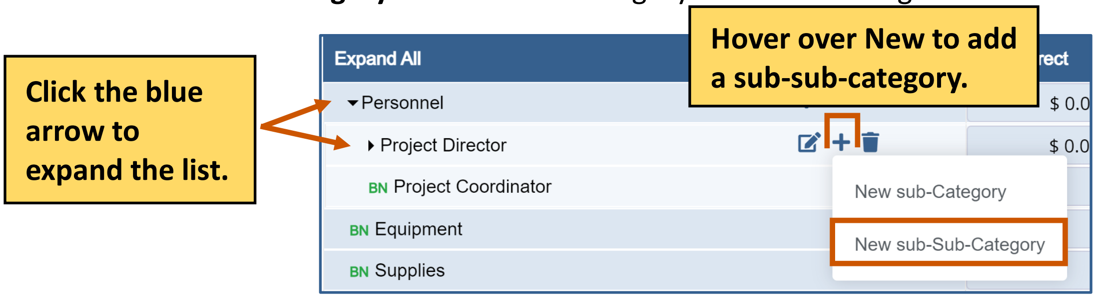
Move a Sub-Category Up or Down on the Grid

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

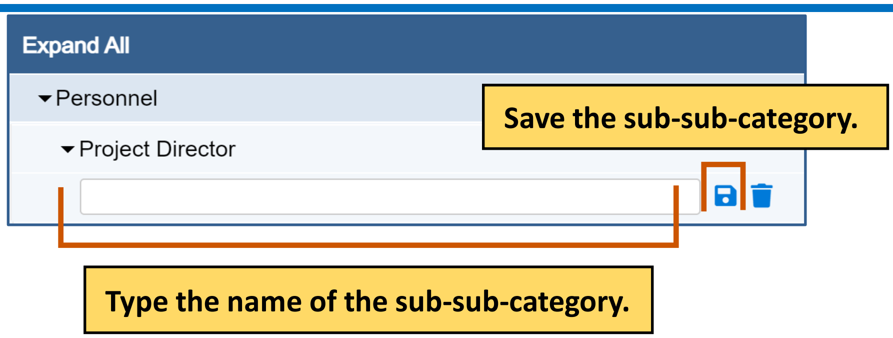


Adding a Sub-Sub-Category

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

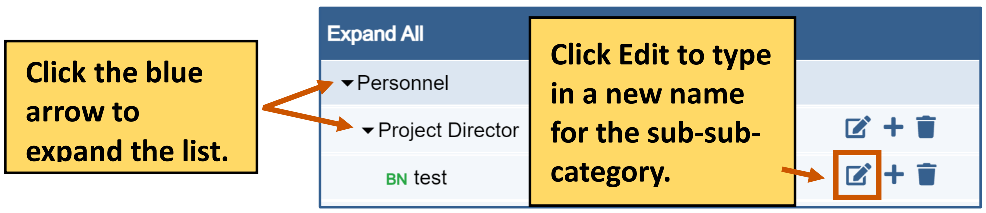


5. Type in the name of the sub-category.
6. Click **Save** . The new sub-sub-category is added to the grid.

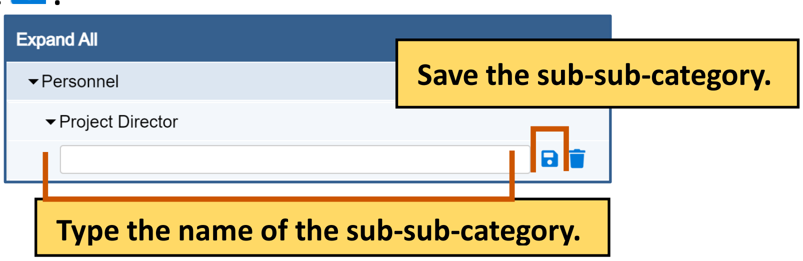


Editing a Sub-Sub-Category

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

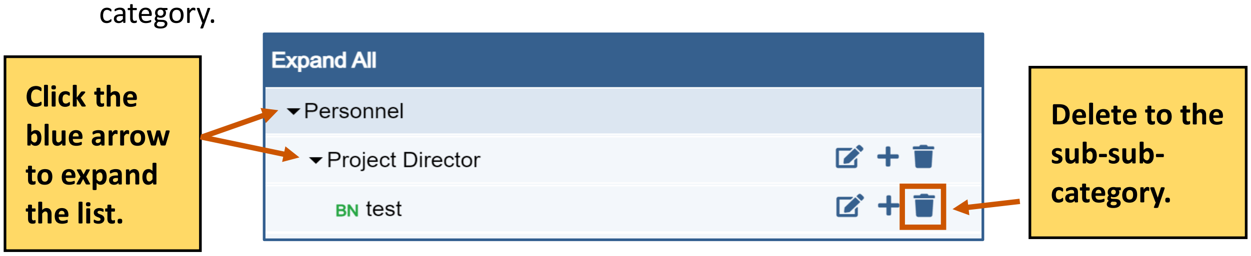


4. Type in the name of the sub-category.
5. Click **Save** .

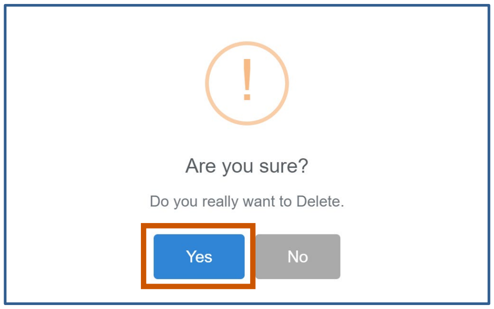


Deleting a Sub-Sub-Category

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



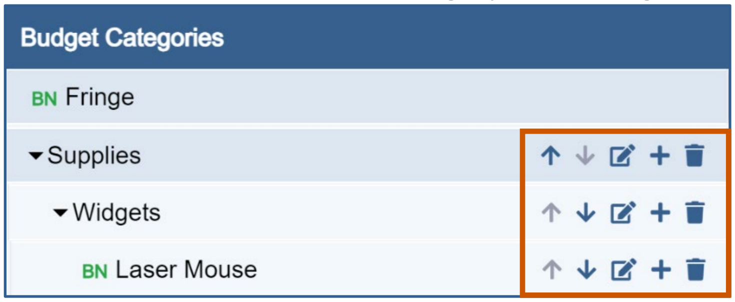
4. Click **Yes.** The sub-category is deleted.



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

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

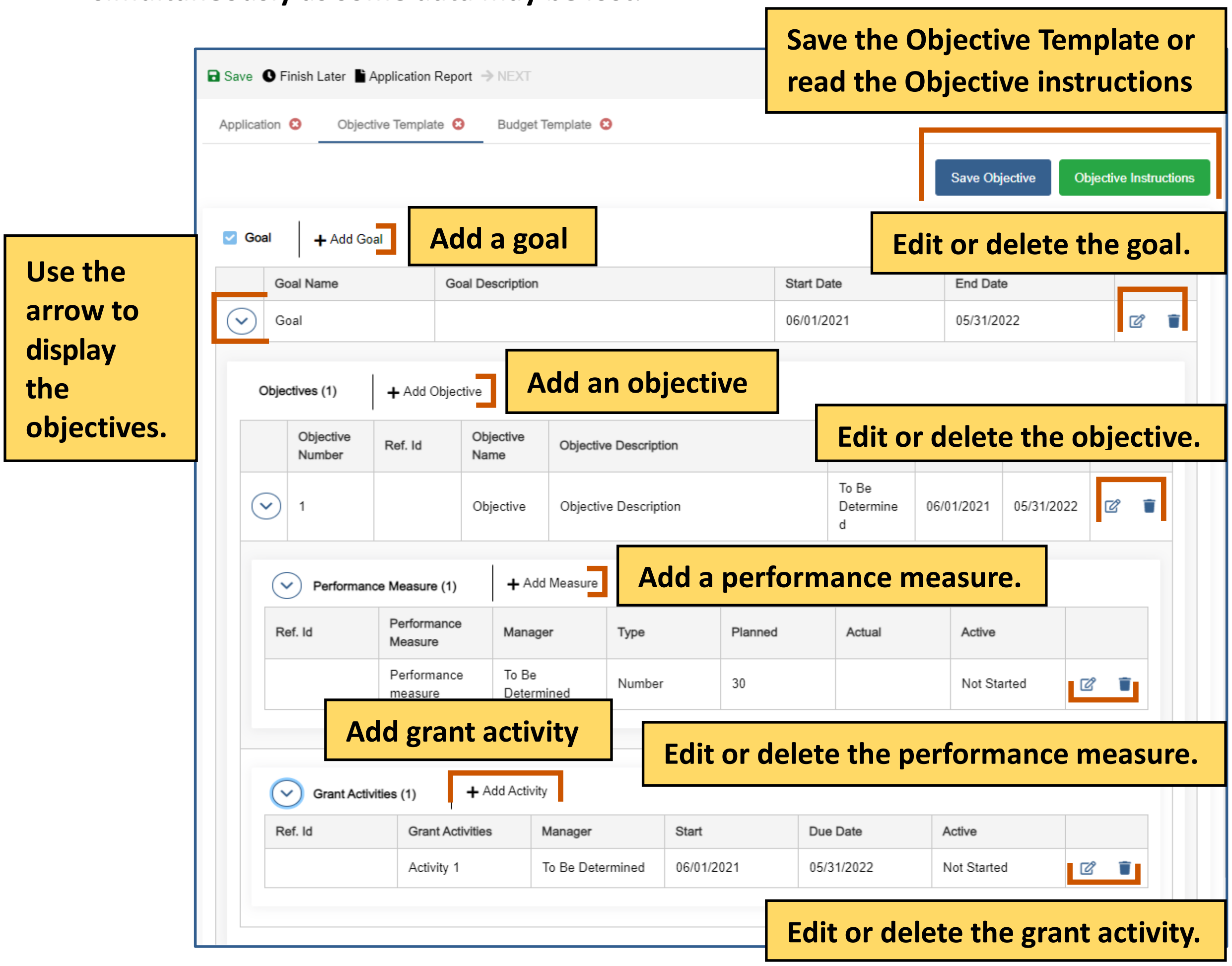
   Click **Move Down** ↓ to move the sub-sub-category down the grid.



Objective Tools

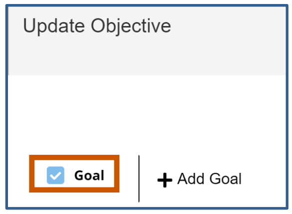
You can add, edit, or delete parts of the Objective template. Use the arrows to expand the list of objectives, performance measures, and grant activities. When you are done modifying the Objective template, save it to lock it.

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.

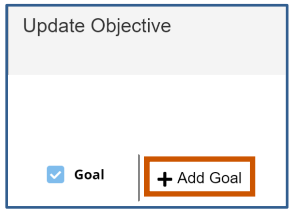


Adding a Goal

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



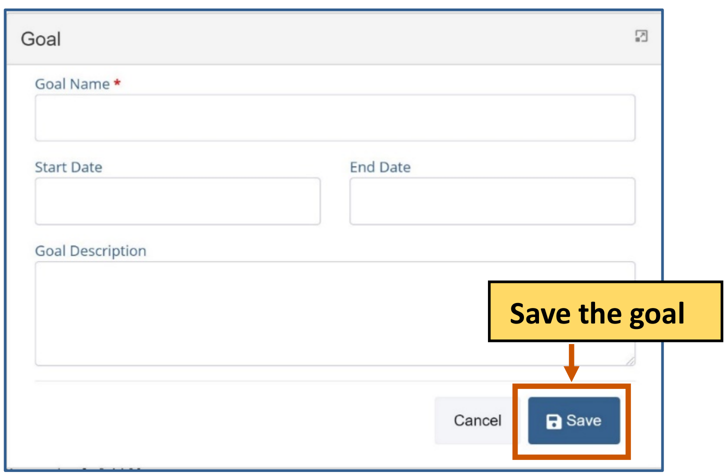
1. Click **Add Goal** **.** The Goal dialog box appears.



3. Fill in the necessary fields.

Note: The red asterisks indicate required fields.

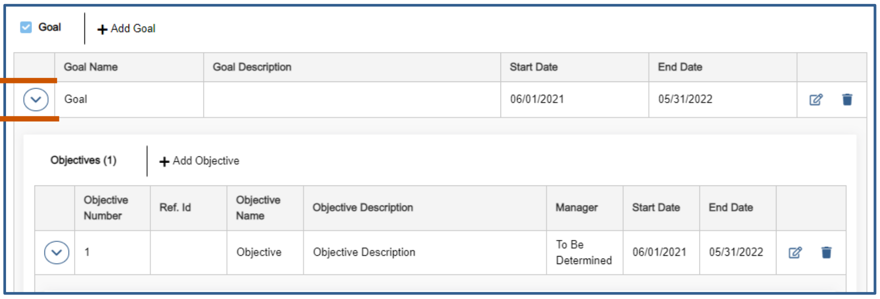
4. Click **Save** **.** The goal appears in the grid. Repeat steps 1-3 for each goal you wish to add.



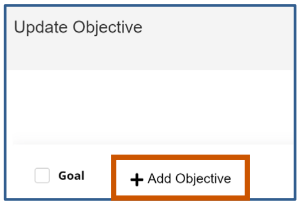
Adding an Objective

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

Use the arrow to display the objectives.

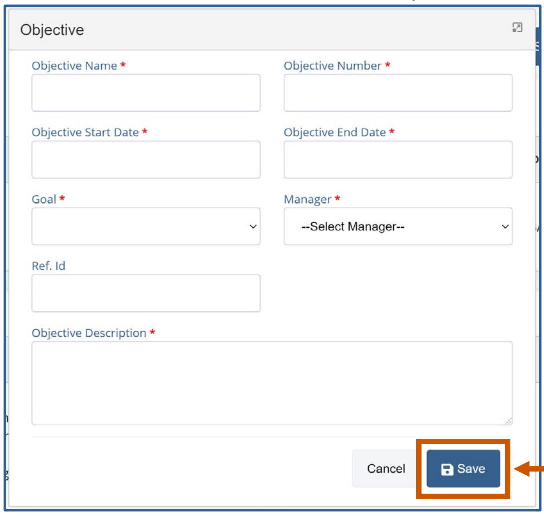


Click **Add Objective** +. The Objective dialog box appears.



Fill in the necessary fields.

Note: The red asterisks indicate required fields.

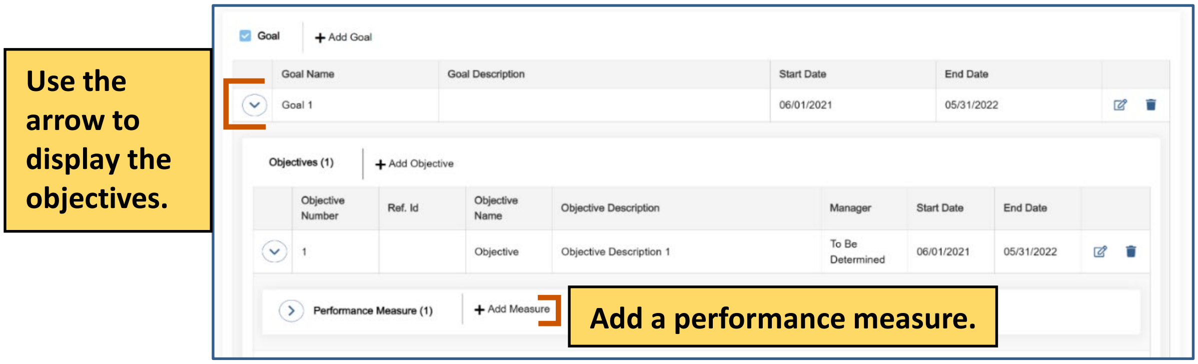


Save the new objective

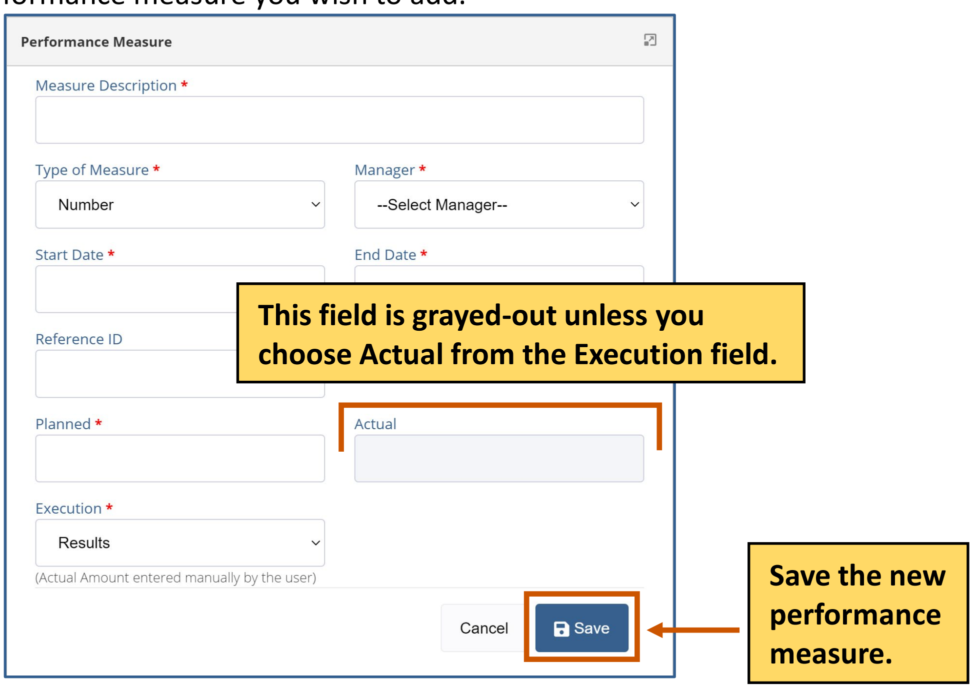
1. Click **Save** . The objective appears in the grid. Repeat steps 2-4 for each objective you wish to add.

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.



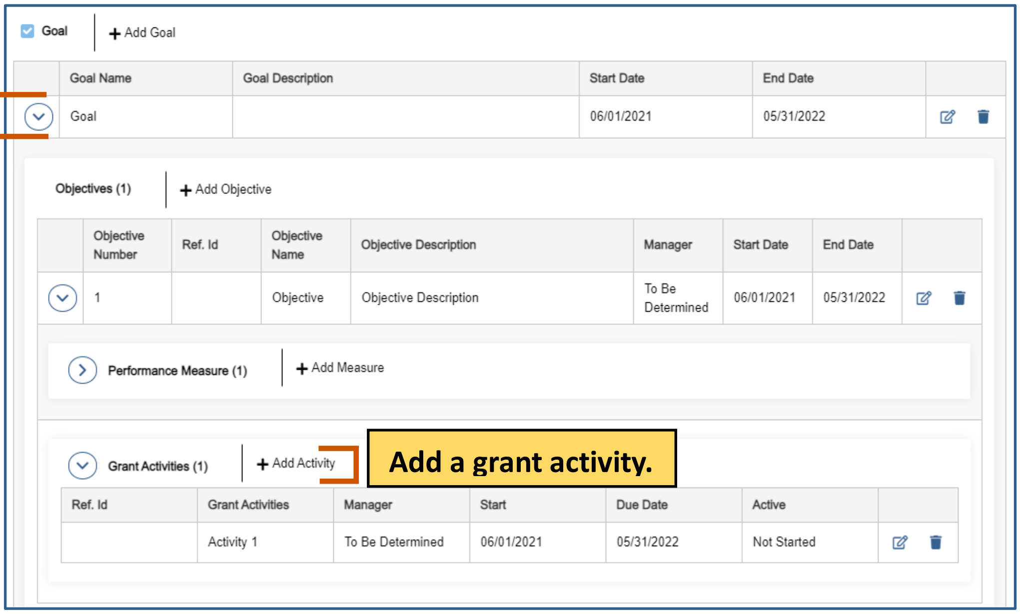
4. Fill In the necessary fields.
   ⓘ **Note:** The red asterisks indicate required fields.
5. Click **Save** . The performance measure appears in the grid. Repeat steps 3-5 for each performance measure you wish to add.



Adding a Grant Activity

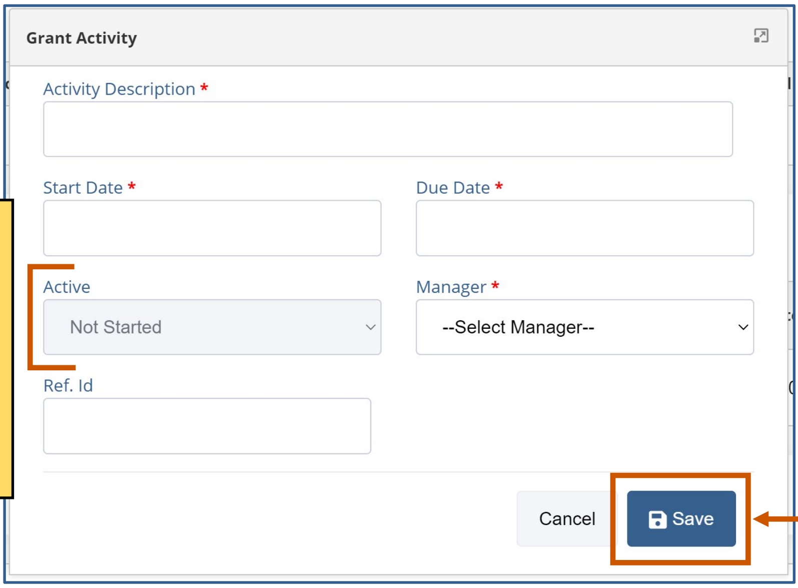
1. **Optional:** Use the arrow to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Click **Add Activity** **+**. The Grant Activity dialog box appears.

Use the arrow to display the objectives.



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.

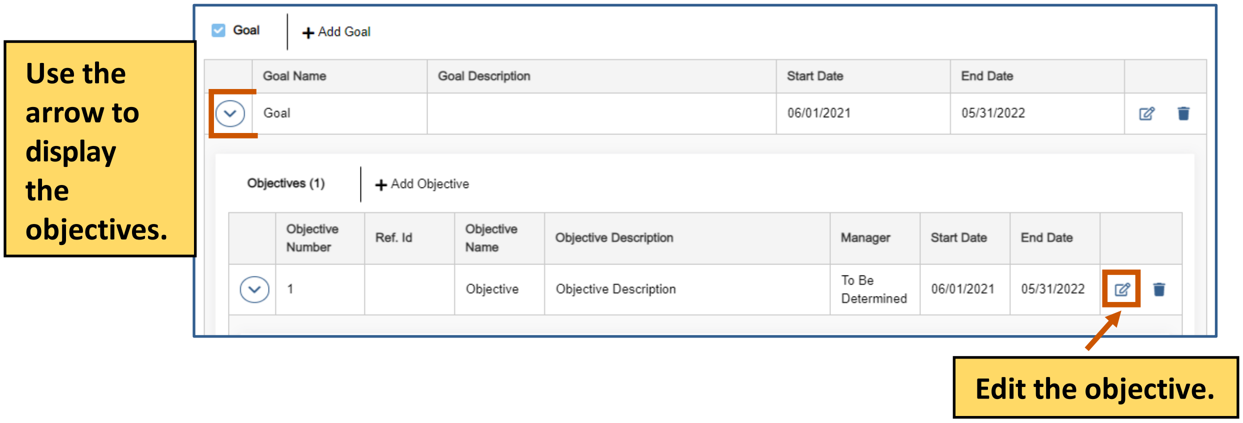
This field is grayed-out, which means you cannot edit it. It changes once you collect data.



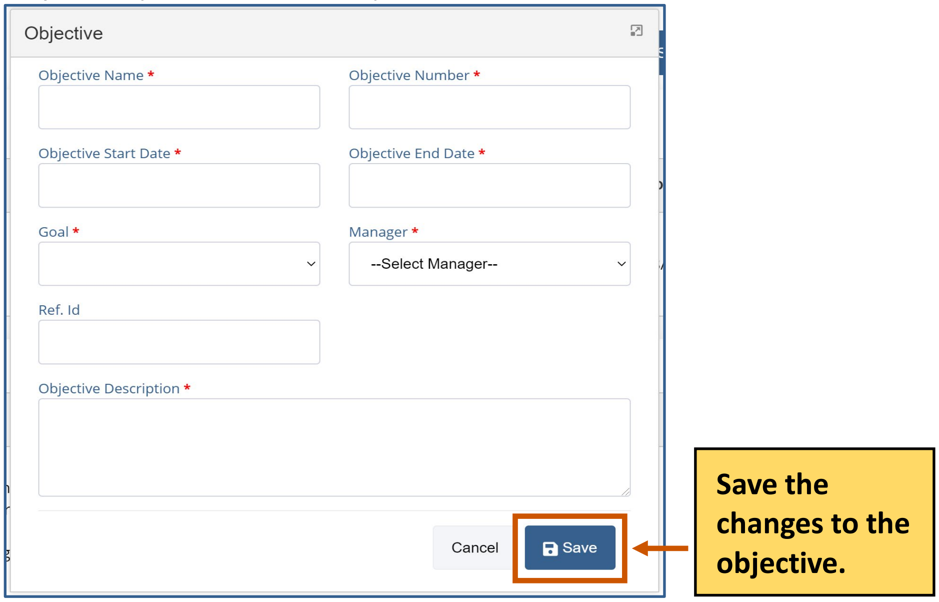
Save the new grant activity.

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.

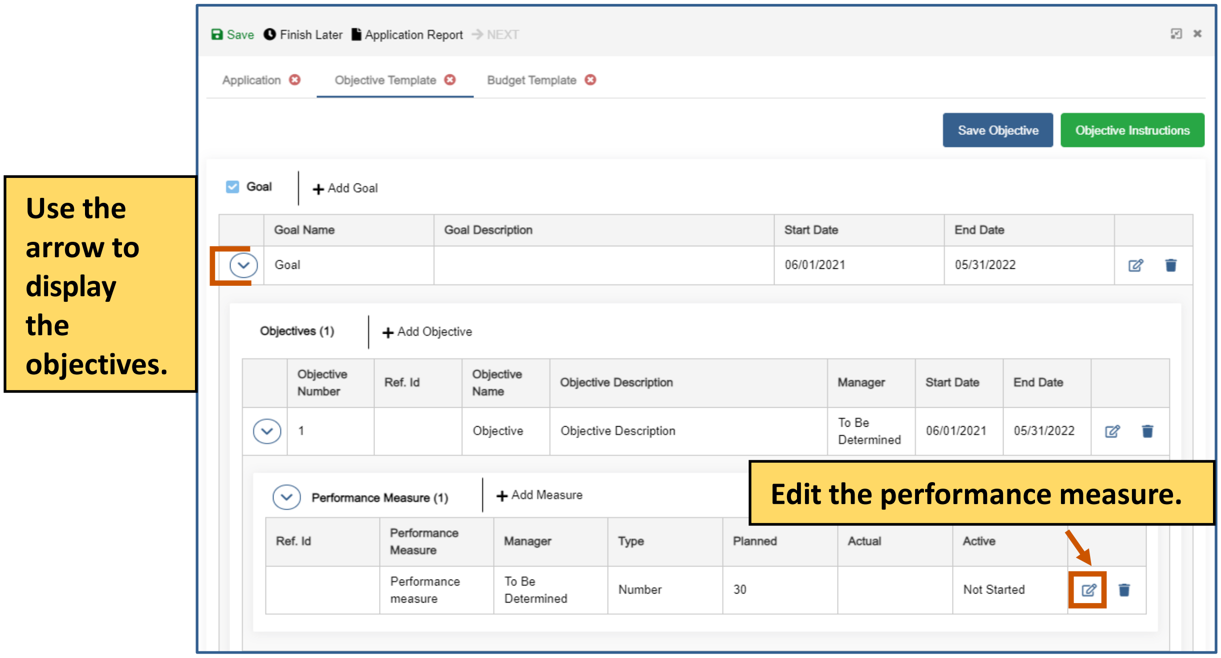


5. Edit the necessary fields.
   Note: The red asterisks indicate required fields.
6. Click **Save** . The changes to the objective appears in the grid. Repeat steps 3-6 for each objective you wish to modify.



Editing a Performance Measure

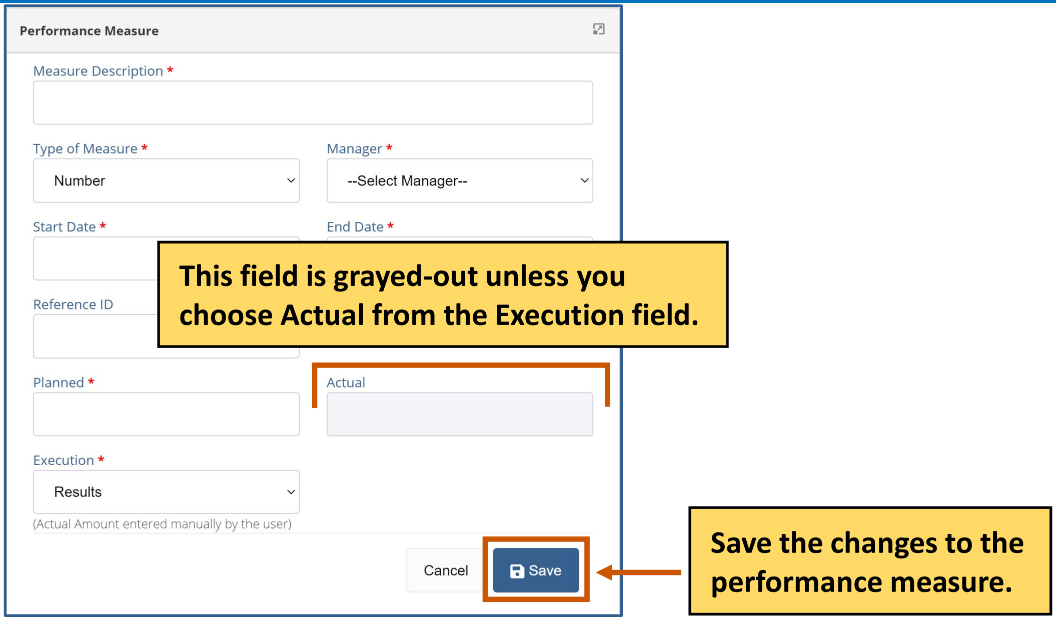
1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the performance measure to expand the list.
4. Choose the performance measure you wish to modify.
5. Click **Edit** . The Performance Measure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



6. Edit the necessary fields.

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

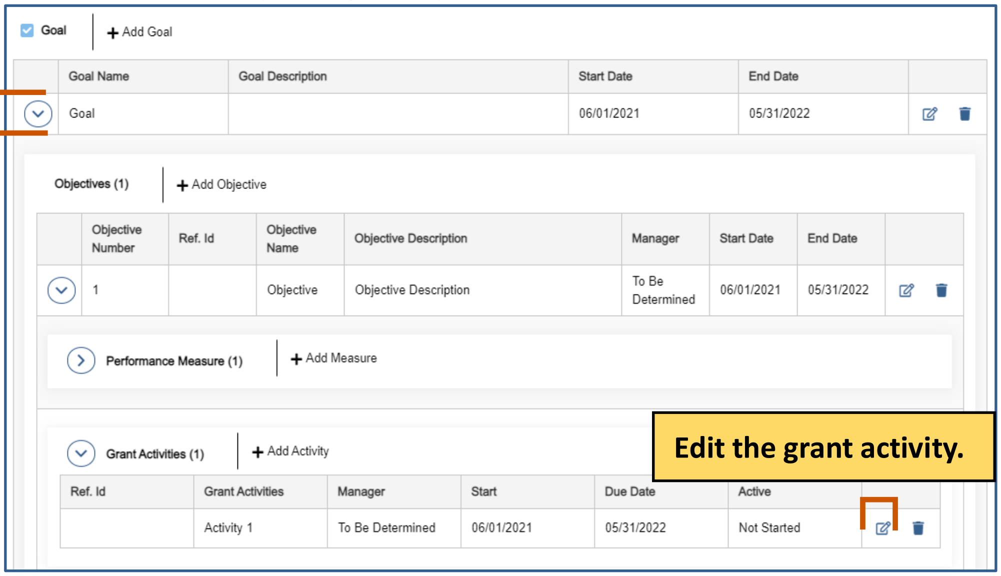
7. Click **Save** . The changes to the performance measure appear in the grid. Repeat steps 4-7 for each performance measure you wish to modify.


Performance Measure
Measure Description *
Type of Measure *
Number
Manager *
--Select Manager--
Start Date *
End Date *
Reference ID
This field is grayed-out unless you choose Actual from the Execution field.
Planned *
Actual
Execution *
Results
(Actual Amount entered manually by the user)
Cancel
Save
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.

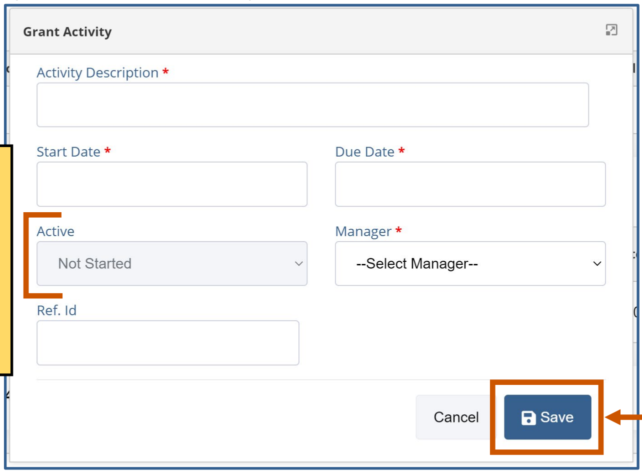
Use the arrow to display the objectives.



Edit the grant activity.

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.

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



Save the changes to the grant activity.

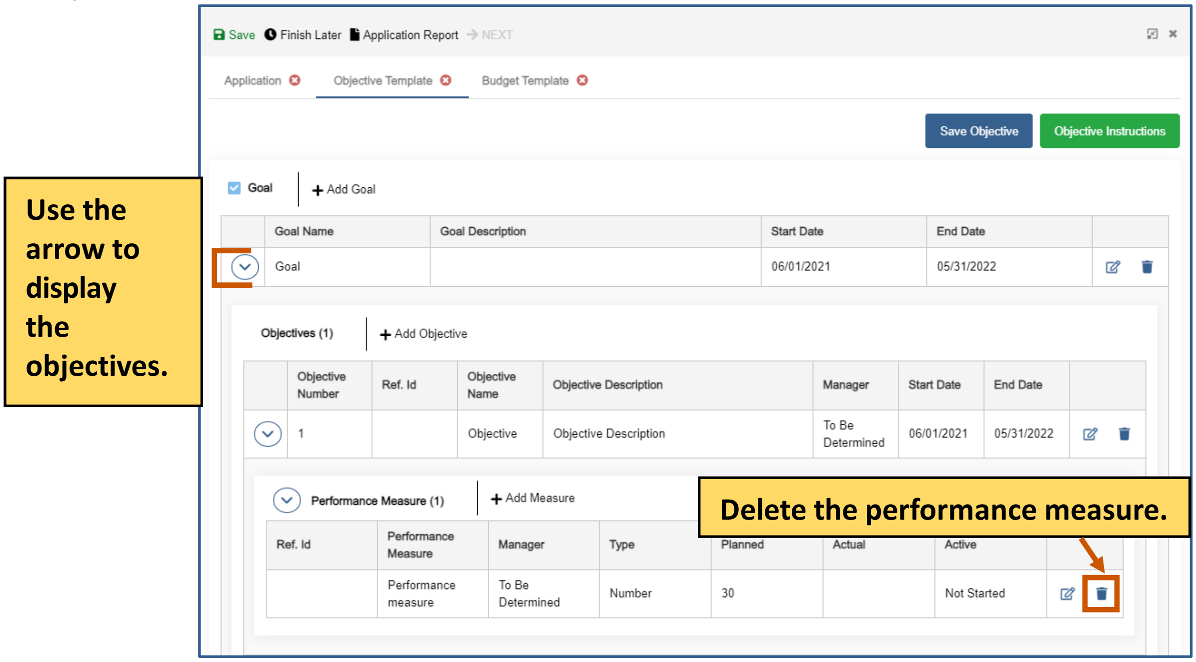
Deleting an Objective

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

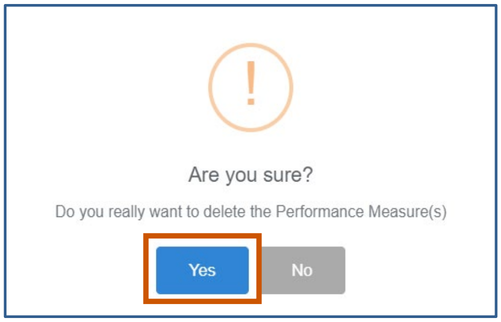
5. Click **Yes.** The objective disappears from the grid. Repeat steps 3-5 for each objective you wish to delete.

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.

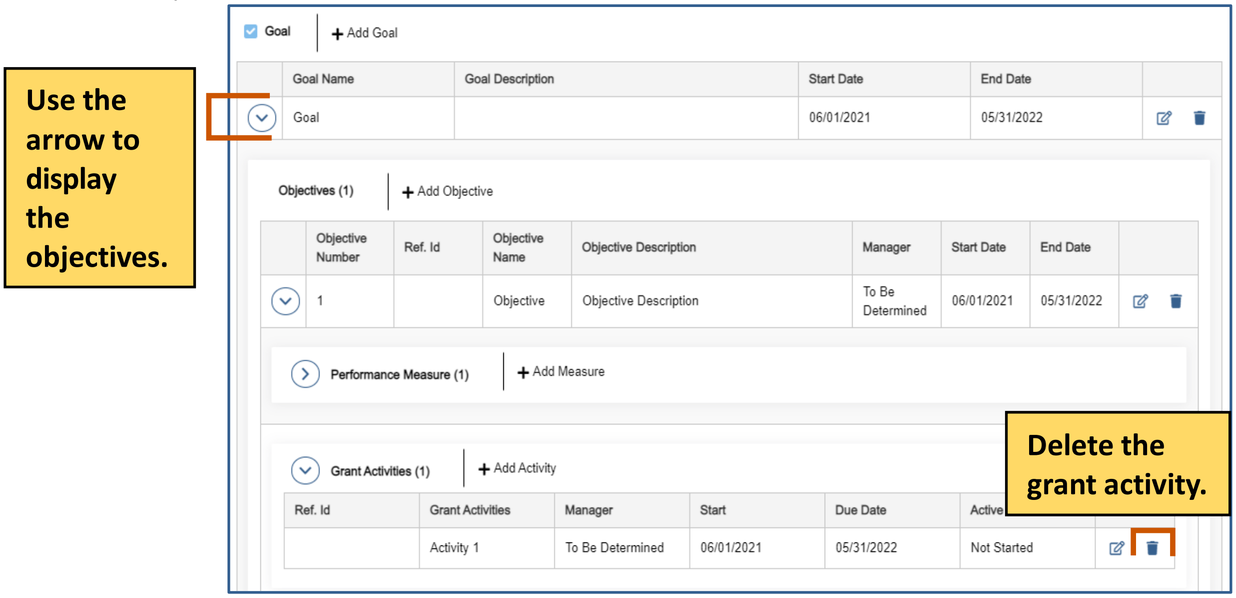


6. Click **Yes.** The performance measure disappears from the grid. Repeat steps 4-6 for each performance measure you wish to delete.



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.