

Applicant Instructions

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Login

- 1. Open a 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 GrantVantage Portal appears.



Figure 1: GrantVantage URL

3. Click Log In → . The Log In screen appears. From the Log In screen, returning users may login to the system.

GrantVantage	Funder Portal	Log In → Reviewer Announcements
Announcement Name or Funding Announcement Number	٩	Sort By 🗸 🗮 📰
Better Education for Neighborhood Kids Fund Amount: \$3,000.00		
Application Type Initial		
▶ 05-30-2021, 6:00 PM MDT ▶ 05-29-2023, 6:00 PM MDT		
⊘ View		

Figure 2: Public Facing Page

4. Enter login credentials and select Log In.

GrantVantage®

Login

GrantVantage Log In
User Name *
example@email.com
Password *
Remember Me Forgot Password?
Log In Register Powered by
Login With:

Figure 3: Login Screen

Register an Applicant Profile

- 1. Open a 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 GrantVantage Portal appears.

https://OrganizationName.gvgrantcloud.com/account/announcement P ŵ This unique web address is related to your organization and is provided by your grant administrator.

3. Click Log In → The Log In screen appears. From the Log In screen, new users must register into the system.

GrantVantage	Funder Portal	Log In Announcements
Announcement Name or Funding Announcement Number	٩	Sort By 🗸 🗮 👪
Better Education for Neighborhood Kids		
Fund Amount: \$3,000.00		
Application Type Initial		
₩ 05-30-2021, 6:00 PM MDT ₩ 05-29-2023, 6:00 PM MDT		
View		

Figure 5: Public Facing Page

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

Figure 4: GrantVantage URL

Applicant Instructions

Register an Applicant Profile

GrantVantage Log In
User Name *
example@email.com
Password *
Remember Me Forgot Password?
Log In Register
Powered by 쯁
Login With:

Figure 6: Register Profile

5. Fill in the necessary fields.

i 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 Instructions

Register an Applicant Profile

Organization	*	
his field is require	ed.	
Organization	Туре *	~
First Name *		
Last Name *		
Email Addres	SS *	
User Name	z	
his field is require	ed.	
Password		
Password (re	epeat)	
	Please prove you are not a robot	
	I'm not a robot	

Figure 7: Applicant Registration

Homepage Navigation

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.

Use	the search bar to choose an announcement.	for the announcement
Applicant Yoda Property Manager	Announcement Name or Funding Announcement Number	Sort By \checkmark = =
Funding Announcement	Better Education for Neighborhood Kids	Funding Amount
My Submitted Application	Neighborhood Klas	Newly Posted
My Applicant Profile	Fund Amount: \$3,000.00	Closing Soon
🔊 Users 🗸		Use the Sort By
Active	Application Type	drop-down list
ិি • • • • • • • • • • • • • • • • • • •	Initial	to sort the announcement.
Contacts	₩ 05-30-2021, 6:00 PM MDT ₩ 05-29-2023, 6:00 PM MDT	
Documents	Save 🕑 View	
Site map		

Figure 8: Homepage Screen 1



Figure 9: Homepage Screen 2

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	Site Map Options	Description
Yoda Property Manager	Funding Announcement	Displays all published announcements.
Funding Announcement	My Submitted Application	Displays all the
My Submitted Application		announcements you have saved and/or applied to.
My Applicant Profile	My Applicant Profile	View your Applicant Profile.
∬ Users ∨		You can add additional documents and relevant information such as a
Active		professional CV or other
ີ່ 🖤 Inactive		certifications related to the applicant or entity's
Ontacts		qualifications.
Documents	Users	R
	Active	View the active users related to the application.
	Inactive	View the active users related to the application.
	Contacts	View the contacts related to the application.
	Documents	View documents related to the application.

Table 1: Site Map

Funding Announcement

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.

	Use the search bar to choose an announcement.		Choose the view display for the announcement
Displays the name of the	Announcement Name or Funding Announcement Number Q Better Education for Kids		Sort By V = ::
announcement, the application type, and the	Application Type Initial 08-31-2021, 6:00 PM MDT 08-30-2029, 6:00 PM MDT Save View		closing Soon he Sort By drop- list to sort the
application open and close date.		anno	uncement.

Figure 10: Funding Announcement Screen 1



Figure 11: Funding Announcement Screen 2

Save an Announcement

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



Figure 12: Site Map – Funding Announcement

- 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.



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Funding Announcement

Print the Announcement as a PDF

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

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

Figure 14: Print PDF Funding Announcement

View Attachments associated with the Announcement

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

Apply	× Close	🔒 Print PDF	Attachments
Better E	Better Education for Neighborhood Kids		

Figure 15: View Attachments

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

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

Attachments				×
Attachment	Name			
(6)Equal Em	ployme	ent Opportunity Plar	n (1).pdf	*
Total: 1		Use the arrows to	→ K	
Total number of documents		see more documents.		Use the drop-down list to choose how many
	•			documents you see in the grid at a time.

Figure 16: Attachments Dialog Box 1

	Attachments	×
Click the link to view the	Attachment Name	Download the document
document.	(6)Equal Employment Opportunity Plan (1).pdf	*
	Total: 1	
		Figure 17: Attachments

Funding Announcement

Submitting an Announcement

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



Figure 18: View Announcement

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



Figure 19: Apply to Announcement

			Application Details	S		×
Click to apply	+ Begin New Appli	ication				
with a	Project Name	Application ID	Application Status	Last Saved On	Submission Date	
project.	Better Education for Kids	2021-09-Education	In Progress	08/27/2021	09/03/2021	
	Total: 0		Use the arrows to	K (1) H 10 V	
Tetelm			see more projects.	Use the d	rop-down list to	
Total nu	umber of proje	ects		choose ho	w many project	s
				you see in	the grid at a tin	ne.

Figure 20: Application Details Dialog Box

3. Click **+** Begin New Application. The New Application dialog box appears.

GrantVantage®

Funding Announcement

		Application Details	3	
Begin New App	lication			
Project Name	Application ID	Application Status	Last Saved On	Submission Date
		No data		

Figure 21: Begin New Application

- 4. Enter a project name.
- 5. Click **Save.** The project appears in the grid.

New	Application		🗹 Save	e Close	
	Project Name*				
	Clubhouse Education				
		1			
		Ļ			
		Application Details			
Begin New Ap	plication				
Project Name	Application ID	Application Status	Last Saved On	Submission Date	
Clubhouse Education	App-21-98 App	Not Started	10/18/2021	10/15/2021	
fotal: 0			H 4	1 H 10 N	~

Figure 22: New Application Dialog Box

6. Click Apply. A warning popup appears telling you which project you are applying with.



Figure 23: Warning Choose Project

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7. Click **Yes.** Another popup appears telling you the application is about to begin.



Figure 24: Application Confirmation Dialog Box

- 8. Click Yes. The application process begins.
- 9. Answer all the questions and complete the templates. Swap between the tabs to complete them in any order.
 - (i) Note: Once you complete a tab item, the red x next to the name turns into a green checkmark.

Application Questions:

a. Optional: Use the hamburger menu to see all the questions.

Tip: The questions are color-coded to indicate the completion process.

- Blue The question is in progress.
- Gray The question needs to be viewed.
- **Green** The question is complete.

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



Figure 25: Use Hamburger Menu

Applicant Instructions

Funding Announcement

Save ● Finish Later ■ Application Report → NEXT	×
Application 8 Objective Template S Budget Template	
View All Questions Use the hamburger menu to see all the questions.	
Program Plan NEXT 📎	
Project Proposal 1 of 1 0% Complete Ø0	
Data Collection Methodology Waterways Production Systems	
Question 1 of 1 S Show Instruction Applicant Answer: Not Applicable	
Does your organization provide resources?	
Choose File To Upload	

Figure 26: Humber Menu Status

b. Use the arrows to navigate the questions

B	Save ● Finish Later ■ Application Report → NEXT	×
_	Application 3 Objective Template S Budget Template	
V	iew All Questions =	
Use the arrows to	Use the arrows to PREVIOUS Image: Second state	
navigate each question category.	Category 1 of 1 0% Complete	
question category.	Resources	
	 Question 1 of 1 S Show Instruction Applicant Answer: Not Applicable Save 	
	Does your organization provide resources?	
	Choose File To Upload	

Figure 27: Use Arrows through Questions

c. **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 move onto the next question if necessary.

Funding Announcement

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



ii. Choose from the picklist.

Use the 2 × picklist to Documents choose a Document Name document Date Uploaded Example.docx 05-18-2021 you wish Example 2.docx to upload. Use the drop-down list to choose how many documents you see in the grid at a time. Total 10 number of Total: 2 documents Л Choose File B Save O Cancel Use the arrows to see Close more documents.

Figure 29: Choose Attachment for Question

Or

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

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

Applicant Instructions

Funding Announcement



Figure 30: Upload Attachment

Make sure all questions are complete.



Figure 31: Question Completion

Complete the Objective Template:

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



Figure 32: Complete Objective Template

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



Figure 33: View Objective Instructions

c. Click **Maximize** To maximize the window. Or

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

Objective Instructions	× C
Complete the Objective Template	

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

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

- e. Add in the objectives, performance measures, and grant activities.
 - (i) Note: The performance measures and grant activities must be associated with an objective. For more information on how to add, edit, or delete a goal, objective, performance measure, or grant activity, see <u>Objective Tools</u>.

Figure 34: Maximize or Save Objective Instructions

Applicant Instructions

Funding Announcement

Save Finish Later Application Report NEXT Application Objective Template Budget Template	Command bar Save Objective Objective Instructions
Goal Arme Goal Description Goal 1	Start Date End Date 06/01/2021 05/31/2022
Objectives (1) + Add Objective Add an objective Objective Ref. Id Objective Objective Number Ref. Id Objective Objective	Manager Start Date End Date
S Grant Activities (1) + Add Activity Add an activ	rformance measure
lick the arrow to	

Figure 35: Objective Template

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.

Table 2: Objective Command Bar

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

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

- g. Optional: You can unlock the Objective Template again if you need to make changes.
 - 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.

Figure 36: Save Objective Template

GrantVantage

Funding Announcement

Application	Objective Template 🥏	Budget Template 🥝	
		Return to Draft Objective Inst	ruction

Figure 37: Return Objective Template to Draft

Complete the Budget template.

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

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



b. Use the budget tools to add, edit delete parent categories, sub-categories, or sub-subcategories. For more information, see Budget Tools.

View the Budget Instructions for specific

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



Figure 39: Budget Template

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

Application 8	Objective Template 😢	Budget Template 8

Figure 40: Save Budget Template

- 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 Instruction

Figure 41: Return Budget Template to Draft

Finish the application process

10. 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	× 1
	Figure 42: Finish Application Proces

11. Click Save & Continue.



Figure 43: Warning to Check Questions

12. Fill in the necessary fields.

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

Applicant Instructions

Funding Announcement

Provide Project Name * Project Summary * Project Summary		Requested Amount \$ 500.00	This field is on out if it is a bu template. If th budget templa will be white a entry of a dolla	dget ere is no ate, the field and allow ar
Authorized Certifying Official		Project Director/Manag	ger	1)
Type to Search Authorized Certifying Official Q	× +	Type to Search Pro	ject Director/Manager	Q × +
Project Manager/Coordinator		Compliance/Fiscal Off	icer	
Type to Search Project Manager/Coordinator	× +	Type to Search Cor	npliance/Fiscal Officer	Q × +

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

■ Save Section Sec	➡ Finish	¥ ¥	
	<i></i> .		

Figure 45: Go to Submission Page

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



Figure 46: Submit Application

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Figure 44: Project Information



Funding Announcement

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



Figure 47: Warning to Submit Application

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.

Saving O Finish Later Application I	Report 🗲 PREVIOUS	* 4
You have completed the grant application q	uestionnaire process.	
 Select PREVIOUS to go back and review 	v or edit your answers.	
 Select Application Report to view a print 	able summary of your application.	
 Select Cancel to save and resume later. 	Your answers have been saved.	
 Select SUBMIT to complete this applicat 	ion. This action is not reversable.	
	X Cancel	
Ļ		
Better Education for Kids		
Fund Amount: \$10,000.00		
Application Type Initial		
▶ 08-31-2021, 6:00 PM MDT ▶ 08-30-2029, 6:00 PM MDT		
⊘ View	Submited Successfully	
		Figure 10. Suk

Figure 48: Submit Successful

My Submitted Application

My Submitted Application

View all the announcements you have applied to. You can view the application report, the objective report, and the budget report.

	N	ly Submitted	Application					
Click the blue				_				
arrow to show	S	Search		Q				
the application,		Project Name	Announcement	Submitted	Amount	Status	Award/Denial	
objective, and				Date	Requested		Date	Amount
budget reports.	16				\$84,500.00	SUBMITTED		\$0.00
Click the red		Report Name	Report		Report Cr	reation Date		
arrow to collapse		Application Re	•	al Application Report	10/15/202			
the report list.		Objective Rep	oort Origina	al Objective Report	10/15/202	21		
		Budget Repor	t Origina	al Budget Report	10/15/202	21		
	Tot	al: 1				М	(1)	M 10 🗸

Figure 49: My Submitted Application Screen

View Reports

1. From the site map, click Wy Submitted Application. The Funding Opportunity for Applicant page appears.



Figure 50: My Site – My Submitted Application

2. Click the blue arrow to show the application, objective, ad budget reports.

Applicant Instructions

My Submitted Application

	N	ly Submitted	Application					
Click the blue				_				
arrow to show	S	earch		Q				
the application,		Project Name	Announcement	Submitted	Amount	Status	Award/Denial	Awarded
objective, and				Date	Requested		Date	Amount
budget reports.						SUBMITTED		
Click the red		Report Name	Report	Туре	Report (Creation Date	e	
arrow to collapse		Application Re		Application Report	10/15/20			
the report list.		Objective Rep		Objective Report	10/15/20			
		Budget Repor	5	Budget Report	10/15/20	021		
			0					
	Tot	al: 1				M		▶ 10 ∨

Figure 51: My Submitted Application Screen

3. Click the link to one of the reports. The appropriate report appears.

	Му	Submitted A	pplication					
	Sea	arch		Q				
		Project Name	Announcement	Submitted Date	Amount Requested	Status	Award/Denial Date	Awarded Amount
	•	Clubhouse Education	Better Education for Neighborhood Kids	10/15/2021	\$84,500.00	SUBMITTED	-	\$0.00
		Report Name	Report	Туре	Report	Creation Date	9	
Click the lin	k	Application Rep	oort Origina	Application Report	10/15/2	021		
to one of		Objective Repo	ort Origina	I Objective Report	10/15/2	021		
the reports.		Budget Report	Origina	I Budget Report	10/15/2	021		
	Total:	1				М	(1)	N 10 🗸

Figure 52: Click Link to Report

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 O My Applicant Profile. The Applicant Profile page appears.



Figure 53: Site Map – My Applicant Profile

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

(i) Note: The red asterisks indicate required fields. The Address, Users, Contact, Documents, and Award Status tabs appear only after you save the organization information. Make sure to save each tab information as you go.

Applicant Instructions

My Applicant Profile

Organization Information	Address	Users	Contact	>
Organization Name *		EIN		
Yoda Property Manager				
Organization Type		DUNS Number		
Nonprofit	~			
Website URL		Main Phone		
		+13031231234		
Fax Number				

Figure 54: My Applicant Profile – Organization Information Tab

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

Applicant Instructions

My Applicant Profile

intry 👻
intry 👻
U

Figure 55: My Applicant Profile – Address Tab

4. **Optional:** On the Users tab, add a user. The user you registered with is automatically a user.

Organization Information	Address	Users	Contact	Documents Awar	d Status	drop-dov
+ New						list to
						choose h
Full Name	Organization	Name	Job Title	Phone Number	Email	many us
Test Contact	Yoda Propert	ty Manager	Project Manager	13037896789	tcontact@applicant.con	
Donald Duck	Yoda Propert	ty Manager	Project Director	3031231234	dduck@applicant.com	the grid
Total: 2			Use the a see more		< < 1 → H 10	time.
I number of users			See more	users.		
	I					Ψ.

Figure 56: My Applicant Profile – Address Tab

a. Click **+** New. The Create New User dialog box appears.

My Applicant Profile :	Yoda Property Manager			
Organization Information	Address Users	Contact	Documents A	ward Status
+ New Add us	ser			
Full Name	Organization Name	Job Title	Phone Number	Email
Test Contact	Yoda Property Manager	Project Manager	13037896789	tcontact@applicant.com
Donald Duck	Yoda Property Manager	Project Director	3031231234	dduck@applicant.com
Total: 2				
				B Save

Figure 57: Add User

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

GrantVantage®

My Applicant Profile

Create New User			×
User Information	Address		
	First Name *		
	Last Name *		
lob Title			
Email Address *			
Phone Number			
Jser Name *			
This field is required. Password *			
Password (repeat) *			
Passwords do n	it match!		
		Cancel 🕞 S	ave

Figure 58: Create New User – User Information Tab

- 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.

GrantVantage®

My Applicant Profile

User Information Address	\$	
Address Line 1	Address Line 2	City
County	State/Province/Region	Country
		Select Country 🗸
Postal Code		
		Save the user
		Cancel Save

Figure 59: Create New User – Address Tab

5. **Optional:** On the Contact tab, add a contact. The user you registered with is automatically a contact.

Organization Information + New	Address	Users	Contact	Documents Awa	rd Status	drop- down list to choose how man
Full Name	Organization I	Name	Job Title	Phone Number	Email	contacts
Test Contact	Yoda Property	y Manager	Project Manager	13037896789	tcontact@applicant.com	you see ii
Donald Duck	Yoda Property	y Manager	Project Director	3031231234	dduck@applicant.com	the grid a
tal number contacts			Use the ar see more		N (1) ▶ N 10 ¥	a time.

Figure 60: Create New User – Contact Tab

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

Applicant Instructions

My Applicant Profile

rganization Information	Address	Users	Contact	Documents	Award Status	
- New Ad	d contact					
Full Name	Organization Na	ame	Job Title	Phone Number	Email	
Test Contact	Yoda Property	Manager	Project Manager	13037896789	tcontac	t@applicant.com
Donald Duck	Yoda Property	Manager	Project Director	3031231234	dduck@	Dapplicant.com
Total: 2					H 4 1	▶ N 10 ¥

Figure 61: Add Contact

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

Create new contact	×
Contact Details Address	
First Name *	Last Name *
Job Title *	Email *
Phone Number *	Fax Number
	Cancel Save

Figure 62: Create New Contact – Contact Details Tab

- 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.

GrantVantage

My Applicant Profile

Create new contact		×	
Contact Details	Address		
Address Line 1	Address Line 2	City	
County	State/Province/Region	Country	
Postal Code		Save the contact to the grid.	:t
	[Cancel Save	
	8	Saved Successfully.	
		Figure 63: Creat	e New Contact – Address T

- 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.

Applicant Instructions

My Applicant Profile

Organ	nization Information Address L	Jsers Conta	act Documents	Award Status	
Ch	oose File 🔒 Save 🚫 Cancel				
Actions	B Document Name	Document Type	ī	Date Uploaded	
	Budget For - Zebras Can Swim Across Streams-28-Apr-2021-21_22_26.pdf	PDF File		04-28-2021	
	Application for - Clubhouse Education.pdf	PDF File		10-15-2021	
	Objective For - Zebras Can Swim Across Streams-28-Apr-2021-23_16_25.pdf	PDF File		04-28-2021	
	Objective For - Zebras Can Swim Across Streams-28-Apr-2021-23_04_03.pdf	PDF File		04-28-2021	
	Objective For - Better Education for Neighborhood Kids-18-Oct-2021-19_16_13.pdf	PDF File		10-18-2021	
	Example.docx	Word Document		09-05-2021	
	Application for - Zebras Can Swim Across Streams.pdf	PDF File		04-27-2021	
	Application for - Opportunity for Youth.pdf	PDF File		10-21-2021	
	Example 2.docx	Word Document		10-08-2021	
	Application for - Better Education for Kids.pdf	PDF File		09-05-2021	
otal: 10	0			(H) (I)	▶ ₩ 10 ▼
1y A	pplicant Profile : Yoda Prope	ty Manager			
-	anization Information Address	Users	Contact	Documents	Award Statu

Figure 64: Add Attachment to Profile

c. Click **Save** to save the document to the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 6a-6c for document.

My Applicant Profile :	Yoda Property	Manager			
Organization Information	Address	Users	Contact	Documents	Award Status
Bracket.docx	ve 🚫 Cancel				

Saved Successfully.
Figure 65: Save Attachment to Profile

applicantsupport@grantvantage.com
My Applicant Profile

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



Figure 66: Create New Contact – Award Status Tab

- 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.

Use the Announcen list to choose an an Announcement No Filter (0)			the search ba an announce	
Announcement	Project Name	Submitted Date	Amount Requested	Status
Better Education for Kids Total: 0	Riverside Community	09/03/2021	\$10,000.00	
				Sav

Figure 67: Choose Announcement

GrantVantage

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

My Applicant Profile : Yo	oda Property Ma	anager				
Organization Information	Address	Users	Contact	Documents	Award Status	
Announcement						
No Filter (0)			✓ Sear	ch		Q
Announcement		Project Name		Submitted Date	Amount Requested	Status
Better Education for Kids		Riverside Commu	unity 0	9/03/2021	\$10,000.00	AWARD
Total: 0					H 4	1 H 10 V
				Si	ave the	
					pplicant profi	le.

Saved Successfully.

Figure 68: Save Applicant Profile

GrantVantage

Users

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

+ Ne		rch bar to look for	users.		
Sear	.ch			۹	
	Name	Email	Organization Unit	Active	
	Test Contact	tcontact@applicant.com	Yoda Property Manager	0	Use the drop-
	Donald Duck	dduck@applicant.com	Yoda Property Manager	0	down list to
Total: 2	2	Use the arro	ows to sers.	4 1 > H 10 ~	choose how many users you see in

Figure 69: Active Users Screen

Active

You can view active users.

User		n bar to look for	users.	٩	
	Name	Email	Organization Unit	Active	
	Test Contact	tcontact@applicant.com	Yoda Property Manager	0	Use the drop-
	Donald Duck	dduck@applicant.com	Yoda Property Manager	0	down list to
	er of users	Use the arr see more u		 ▲ 1 → H 10 × 	choose how many users you see in the grid at a time.

Figure 70: Active Users Screen

1. From the site map, click Users and choose Active from the drop-down list. The Active Users screen appears.

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Users



Figure 71: Site Map – Active Users

Inactive

You can view inactive review panels.

+ New Users Use the searc	h bar to look for	users.		
Search			Q	
Name	Email	Organization Unit Active		
Donald Duck	dduck@applicant.com	Yoda Property O Manager		Use the drop- down list to
Total: 1	Use the arrow		10 🗸	choose how many users you see in
Total number of users				the grid at a time.

Figure 72: Inactive Users Screen

1. From the site map, click Users and choose I Inactive from the drop-down list. The Inactive Users screen appears.

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Users

Applicant Yoda Property Manager	
Funding Announcement	
My Submitted Application	
My Applicant Profile	
🔊 Users	~
Active	
😂 Inactive	

Figure 73: Site Map – Inactive Users

GrantVantage

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 from the drop-down list. The Active Users screen appears.

Applicant Yoda Property Manager
Funding Announcement
My Submitted Application
My Applicant Profile
🖞 Users 🗸
Active
🖳 Inactive

Figure 74: Site Map – Active Users

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

- Net	• Create a us	ser			
ers					
Searc	ch				Q
	Name	Email	Organization Unit	Active	
	Test Contact	tcontact@applicant.com	Yoda Property Manager	0	
	Donald Duck	dduck@applicant.com	Yoda Property Manager	0	
tal: 2			н	• •	M 10 V

Figure 75: Create User

Under the Active column:

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

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

	Create New User ×
	User Information Address
Use the search icon to	First Name * This field is required. Last Name *
add a parent	Parent Organization *
organization. The default	Yoda Property Manager Q X
is the organization you	Job Title
are viewing.	
	Email Address *
	Phone Number
The default username is	User Name *
the user you are currently	tcontact
logged in to.	Password *
The default password is the user's password you are currently logged in to.	Password (repeat) * Passwords do not match!
	Cancel Save

Figure 76: User Screen – User Information Tab

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

GrantVantage

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.

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

Figure 77: Create New User – Address Tab

GrantVantage

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.

+ New ✓ Active	E Deactive	Command ba	ar		
Users	Use the s	<mark>earch bar to</mark> f	find a user.]	
Search					Q
✓ Name	E	mail	Organization Unit	Active	
Donald Duck	d	duck@applicant.com	Obi-wan Organiz	ation 🕴	
Total: 1	1			H (1	▶ H 10 ♥
Single-click the u	iser to displa	y the comma	nd bar.		

Figure 78: Display User Commands

3. Edit the necessary fields for each tab.

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

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

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

Figure 79: Create New User – Address Tab

GrantVantage

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.

+ New ✓ Active		bar		
Users	Use the search bar	to find a user.		
Search			Q	
✓ Name	Email	Organization Unit	Active	
Donald Duck	dduck@applicant.co	om Obi-wan Organization	0	
Total: 1	1	•]
Single-click the	user to display the com	mand bar.		_

Figure 80: Display User Commands

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



Figure 81: Activate 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.

(!)	
Are you sure?	
Do you really want to activate the User(s)	
Yes No	Activated Successfully
	Figure 82: Warning to Activate User

applicantsupport@grantvantage.com

GrantVantage

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.

+ New ✓ Active	Deactive Command ba	ar		
Users	Use the search bar to	find a user.		
Search				Q
✓ Name	Email	Organization Unit	Active	
Donald Duck	dduck@applicant.com	Obi-wan Organization	0	
Total: 1	1	н		10 🗸
Single-click the u	ser to display the comma	nd bar.		

Figure 83: Display User Commands

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



Figure 84: Deactivate 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.

(!)	
Are you sure?	
Do you really want to deactivate the User(s)	
Yes No	Deactivated Successfully
	Figure 85: Warning to Activate User

applicantsupport@grantvantage.com

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Contacts

Contacts

View the contacts related to the application.

+ New Contacts					
Full Name	Organization Name	Job Title	Phone Number	Email	
Test Contact	Yoda Property Manager	Project Manager	13037896789	tcontact@applicant.com	Use the drop-
Donald Duck	Yoda Property Manager	Project Director	3031231234	dduck@applicant.com	down list to
Total: 2		Use the a		 ▲ 1 ▶ ▶ 10 ¥ 	choose how many contacts you see
number of contacts					the grid at a time

Figure 86: Contacts Screen

Add a Contact

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



Figure 87: Site Map - Contacts

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

GrantVantage

Contacts

ail
ntact@applicant. N
ck@applicant.co
▶ H 10 ❤

Figure 88: New Contact

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

Create new contact	×
Contact Details Address	
First Name *	Last Name *
Job Title *	Email *
Phone Number *	Fax Number
	Cancel Save

- 4. Optional: On the address tab, edit the the necessary fields.
 i) 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.

Figure 89: Create New Contact – Contact Details Tab

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Contacts

Create new contact		×
Contact Details	Address	
Address Line 1	Address Line 2	City
County	State/Province/Region	Country
Postal Code		Save the contact to the grid.
		Cancel Save
	6	Saved Successfully.

Figure 90: Create New Contact – Address Tab

Contacts

Edit a Contact

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

+ New				
Contacts				
Full Name	Organization Name	Job Title	Phone Number	Email
Test Contact	Yoda Property Manager	Project Manager	13037896789	tcontact@applicant.com
Donald Duck	Yoda Property Manager	Project Director	3031231234	dduck@applicant.com
Total: 2 Double-click t	he contact to edit it.		K	

Figure 91: Edit Contact

- 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.

Create new contact		×
Contact Details	Address	
Address Line 1	Address Line 2	City
County	State/Province/Region	Country
Postal Code		Save the contact to the grid.
	[Cancel Save
	•	Saved Successfully.
		Figure 92: Create New Contact – Address

GrantVantage

Contacts

Delete a Contact

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

+ New Telete				
Contacts				
Full Name	Organization Name	Job Title	Phone Number	Email
Test Contact	Yoda Property Manager	Project Manager	13037896789	tcontact@applicant.com
Donald Duck	Yoda Property Manager	Project Director	3031231234	dduck@applicant.com
	he radio button next to tact to display the comr		н	

Figure 93: Click Contact

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



Figure 94: Delete Contact

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

!	
Are you sure?	
Do you really want to delete the Contact(s)	
Yes No	Deleted Successfully.
	- Figure 95: Warning to Delete Contact

GrantVantage

Contacts

Documents

View documents related to the application.

Choose F	ommand	bar ⊗ Cancel			٩	
Actions	Document Nar	ne	Document Type	Date Updated		Use the drop-down
	Application for - B Neighborhood Kid	etter Education for Is.pdf	PDF File	06-18-2021		list to choose how
	Example.docx			06-03-2021		many documents
Total: 2		Use the arr	+	H 4 1 F H	10 🗸	you see in the grid
		more docu	ments.		i	at a time.
numbe cument						

Figure 96: Documents Screen

Command	l Options	Description
Choose File	È	Choose the file you want to upload.
Save	8	Save the file you want to upload
Cancel	0	If you choose a file you do not want to upload, you can cancel uploading the file.

Table 3: Document Command Options

Add a Document

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

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Contacts



Figure 97: Site Map - Documents

- 2. Click Choose File .
- 3. Upload the file.
- 4. Click **B** Save. The file appears in the grid. Repeat steps 2-4 for each document you wish to add.

Documents			
Choose File	Save	⊘ Cancel	
	Ļ]
Documents			
Example 2.docx	B Save	O Cancel	

Figure 98: Add Document

Delete a Document

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

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Contacts

Documen	ts		
Delete			Q
Actions	Document Name	Document Type	Date Updated
	Application for - Better Education for Kids.pdf	PDF File	09-05-2021
Total: 1	Click the radio button next to of contact to display the comm		

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



Figure 100: Delete Document

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

(!)	
Are you sure?	
Do you really want to delete the Document(s)	
Yes No	Deleted Successfully.
	Figure 101: Warning to Delete Document

Figure 99: Click Document

GrantVantage

Objective Tools

Objective Tools

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

									_	Comn	Ianu	Dai
Upd	ate Objective								+		Close	Mini
(pand	Goal + Add Go Goal Name Existing Objectiv	Go	dd a g	oal.			Start Date		_	Save Objective	Obje	ective Instruc
	Objectives (1)						Ed	it or	delet	te the	obje	ective
se the row to	Objective Number	Ref. Id 2491	Objective Name HTS_TST & HTS_POS		Description			Manager Falguni Patel	Start Dat 10/01/2			8
pand e list.	Performat	Performance Measure		d Measure er	Туре	Planned		Actual	A	ctive		
	1417_1	Describe the sources for data that yo are reportin	the Falgur	ni Patel	Narrative				N	lot Started	đ	•
	Grant Acti	vities (2)	+ Add Activit	Manager	Start		Due D	ate	Activ			
	8.1	8.1: Con onsite reorienta index tes	ducting ations in iting and ening PITC of g tool in	Manager Start Falguni Patel 10/01/2020		/2020	10/13/2020		Not Started		¢	
	8.2	8.2: Con District S Supervis	upportive	Falguni Pate	el 10/01	/2020	10/14	4/2020	Not 9	Started	ď	

Figure 102: Goals and Objectives

GrantVantage

Objective Tools

	🔽 Goa	Add Go	pal									Objective		jective In
		Goal Name		Goal Description				Start Dat	•		End Date			
	\odot	Existing Objectiv	ve											
	c	bjectives (1)												
the arrow		Objective Number	Ref. Id	Objective Name	Objective	Description			Manager	Start	Date	End Date		
expand the) 1	2491	HTS_TST 8 HTS_POS	HTS_TST	& HTS_POS			Falguni Patel	10/0	1/2020	10/31/2	020	c' 💼
ist of		Performa	nce Measure	1	dd Measure	Add	a pei	rforn		e me	easi	ure.		
formance		Ref. Id	Performa Measure		_	Туре	Planned		Actual		Active			
asures.		1417_1	Describe sources data that are repo	for the Falgu	uni Patel	Narrative					Not Sta	arted	đ	¥
		Grant Act	ivities (2)	+ Add Activ	vity	Edit o	r dele	ete t	he pe	rfo	rma	nce	me	easu
		Ref. Id	Grant	Activities	Manager	Start		Due	Date	Ac	tive			
		8.1	onsite reorie index stren and u Scree	entations in testing and gthening PITC	Falguni Pate	l 10/0	1/2020	10/1	3/2020	N	ot Starte	d	ď	•
			82.0	onduct		10/0	1/2020		4/2020		ot Starte		ď	

Figure 103: Performance Measures

GrantVantage

Objective Tools

	v 60	Add Ge	pal								Save	Objective	Object	ive Instru
		Goal Name		Goal Description				Start Date	,		End Date			
	\odot	Existing Objecti	ve											
		Objectives (1)												
		Objective Number	Ref. Id	Objective Name	Objecti	ive Description			Manager	Start	Date	End Date		
	(✓ 1			HTS_TST & HTS_TST & HTS_POS			Falguni Patel	10/01/2020		10/31/202	0 2	Ť.	
		✓ Performa	nce Measur	e (4) +	Add Measure									
		Ref. Id Perfor Measu			nager	Туре	Planne	d	Actual		Active			
		1417_1	Describ sources data tha are rep	for the Fa	lguni Patel	Narrative					Not Sta	arted	c 🕯	
		Grant Act	ivities (2)	+ Add Ar	ctivity									
se the arrow	1	Ref. Id		t Activities	Manager	5	art	Due D	late	Ac	ctive			
expand the	1		onsi	Conducting te ientations in										
t of grant		8.1	inde	x testing and ngthening PITC	testing and gthening PITC Falguni Patel 10/01/2020		0/01/2020	10/13/2020		N	Not Started 😰 🧃			41
tivities.			Scre	use of ening tool in ported sites				Edi	it or o	dele	ete g	grant	acti	vity
		8.2	Distr	Conduct rict Supportive ervision	Falguni Pa	atel 1	0/01/2020	10/14	4/2020	N	lot Starte	d	c' 🕯	

Figure 104: Grant Activities

GrantVantage

Objective Tools

Add a Goal

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



Figure 105: Goal Radio Button

- 1. Click **+** Add Goal. The Goal dialog box appears.
- Fill in the necessary fields.
 i Note: The red asterisks indicate required fields.
- 3. Click **Save.** The goal appears in the grid. Repeat steps 1-3 for each goal you wish to add.

	Update Obj	ective	
	🗹 Goal	+ Add Goal	
Goal		ţ	23
Goal Name *			
Start Date		End Date	
Goal Descripti	on	Save the g	goal
		Cancel 🕞 Sa	

Figure 106: Add Goal

Objective Tools

Add an Objective

- 1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
- 2. Click **+** Add Objective. The Objective dialog box appears.

Update Objec		
Goal	♣ Add Objective	

Figure 107: Add Objective

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

ojective		
Dbjective Name *	Objective Number *	
Dbjective Start Date *	Objective End Date *	
Soal *	Manager *	
Ref. Id		
Dbjective Description *		
	Cancel	Save Save the ne

Figure 108: Objective Dialog Box

Objective Tools

Figure 109: Add Measure

Add 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	Objectives (1)							
arrow to expand the	Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
objective's	✓ 1	2491	HTS_TST & HTS_POS	HTS_TST & HTS_POS	Falguni Patel	10/01/2020	10/31/2020	¢
performance	> Performa	ince Measure (4) + Ado	Measure Add a pe	rformance	e measi	ure	
measures								
and grant		Use th	ne arro	w to expand the	list of per	formar	nce me	asures.
activities.								

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

erformance Measure		2	
Measure Description *			
Type of Measure *	Manager *		
Number	 Select Manager 	~	
Start Date *	End Date *		
Planned *	Actual	e Execution field	
Execution *			
Results			Save the new
(Actual Amount entered manually by t	Cancel	B Save	performance measure.

Figure 110: Performance Measure Dialog Box

Objective Tools

Add 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.



Figure 111: Add Activity

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

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

Figure 112: Grant Activity Dialog Box

Objective Tools

Figure 113: Edit Objective

Edit an Objective

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

Use the	Go	Goal + Add Objective							
arrow to		Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
expand the		4	General	Engage Local	Engaging with local stakeholders to remove all barriers to access for persons seeking recovery	To Be	01/28/2020	12/30/2021	2
objective's	\odot	-	Population	Stakeholder S	from opioid and stimulant use disorders	Determined	0172072020	12/30/2021	
performance									
measures						E	dit the	object	ive.
and grant								,	
activities.									

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

Objective		2
Objective Name *	Objective Number *	
Objective Start Date *	Objective End Date *	
Goal *	Manager *	~
Ref. Id		
Objective Description *		
	Cancel Save	Save the new objective.

Figure 114: Objective Dialog Box

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Objective Tools

Edit a Performance Measure

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

Use the arrow to expand the objective's									
performance measures	Objectives (1)								
and grant	Objective Number		jective ime	ive Objective Description M		Manager	Start Date	End Date	
activities.	☑ 1		ITS_TST & HTS_TST & HTS_POS Falguni 10/01/202					Edit the	
Use the	Performa	Performance Measure (4)			+ Add Measure				performance
arrow to	Ref. Id	Performance Measure	Manager	r	Туре	Planned	Actual	Activ	measure
expand the list of	1417_1	Describe the sources for the data that you are reporting	Falguni	Patel	Narrative			Not 5	itarted 🕜 🍵
performance measures.									

Figure 115: Edit Performance Measure

6. Edit the necessary fields.

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

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

Measure Description *			
Type of Measure *	Manager *		
Number Start Date *	Select Manager End Date *		
Reference ID	This field is grayed-out choose Actual from the		
	Actual		
Planned *		1	
Planned * Execution *			
		Save t	he nev

Figure 116: Performance Measure Dialog Box

applicantsupport@grantvantage.com

Objective Tools

Edit a Grant Activity

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

Use the arrow to expand the													
objective's		Objective Number	Ref. Id	Objective Name	Objective Descriptio	n		Manager	Start Da	te	End Date		
performance measures	\odot	4	General Population	Engage Local Stakeholde s	barriers to access	al stakeholders to remo for persons seeking re timulant use disorders	covery	To Be Determined	01/28/2	:020	12/30/2021	ď	Ŵ
and grant activities. Use the	0	Grant Activiti	1	+ Add	Measure				[it the	gra	nt
arrow to	Re	ef. Id	Grant Acti	vities	Manager	Start	Du	e Date	Act	ac	tivity.		
expand the	G	ieneral Population	for prom		To Be Determined 01/28/2020		12/30/2021		Not	Started	nrted 📝 🗑		

Figure 117: Edit Grant Activity

6. Edit the necessary fields.

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

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

Grant Activity Activity Description *		
Start Date *	Due Date *	
Active	Manager *	
Ref. Id	Sav	e the new nt activity.
	Cancel Cancel Save	
	Activity Description * Start Date * Active Not Started	Activity Description * Start Date * Not Started Ref. Id Ref. I

Figure 118: Grant Activity Dialog Box

Objective Tools

Delete 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.



Figure 119: Delete Objective

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



Figure 120: Warning to Delete Objective

Delete 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 expand the									
objective's									
performance measures	Objectives (1)								
and grant	Objective Number		Objective Name	Objective Description		Manager	Start Date	End Date	
activities.	0		HTS_TST & HTS_POS	HTS_TST & HTS_POS		Falguni Patel	10/01/2020	10/31/2020	ď 🕯
Use the	💛 Performa	nce Measure (4)	+ Add	Measure					
arrow to	Ref. Id	Performance Measure	Manage	r Туре	Delete the performance mea				easure
expand the list of	1417_1	Describe the sources for the data that you are reporting	e Falguni	Patel Narrative			Not St	arted	2
performance measures.									

Figure 121: Delete Performance Measure

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



Figure 122: Warning to Delete Performance Measure

Objective Tools

Delete 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.

ai ex	se the rrow to kpand the												
	bjective's		Objective Number	Ref. Id	Objective Name	Objective Description	on		Manager	Start Date	End Date		
m	erformance leasures ad grant	\odot	4	General Population	Engage Local Stakeholder s	barriers to access	al stakeholders to rer for persons seeking timulant use disorde	recovery	To Be Determined	01/28/2020	12/30/2021	¢	¥
	Id grant tivities. > Performance Measure (1) + Add Measure Uses the Srant Activities (1) + Add Activity Delete the												
	Use the	R	ef. Id	Grant Acti		Manager	Start	Du	e Date	Acti g	rant ac	tivi	tv
	arrow to expand the list of grant	General Population Develop Ad for promoti recovery-re		Advertising oting			12	12/30/2021			C 🔋		
	activities.												

Figure 123: Delete Grant Activity

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



Figure 124: Warning to Delete Grant Activity

(i) Note: 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.





Figure 126: View Budget Calculations

Add Budget Calculations and Budget Narratives

Single-click the green BN symbol next to a category. The Budget Categories dialog box.
 Note: The dialog box fields are different based on the budget category.

Budget Categories			Direct	Cash Match	In-Kind Match	Total	Leveraged
BN Fringe	вм Fringe						
 ✓ Supplies 	 ✓ Supplies 	↑↓ 🗹 + 🗑	\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
✓Widgets	 ✓Widgets 	↑↓ 🗹 + 👕	\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
BN Laser Mouse	BN Laser Mouse BN Widgets - other						
BN Widgets - other	BN Widgets - other BN Supplies - other						
BN Supplies - other							
Total			\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
		 BN Fringe Supplies Widgets BN Laser BN Widget BN Supplies 	ts - other	s d	ingle-click the ymbol next to lisplay budget nd the budge	a category calculation	

Figure 127: Add Budget Calculations and Narrative

2. Fill in the necessary fields and add the appropriate information.

Example dialog box

Budget Categories	2
Budget Category	
	~
Total Cost	Cash Match Funds
\$ 0.00	\$ 0.00
In-Kind Match Funds	Total Requested Amount
\$ 0.00	\$ 0.00
Budget Narrative	
	Cancel Save

Figure 128: Budget Categories Dialog Box

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

Budget Categories	Budget C	alculations	Budget Narrative
Fringe Displays the budget category	Displays the total amount of budget calculations	Total Cost: \$0.00 Cash Match Funds: \$100.00 In-Kind Match Funds: \$1,000.00 Total Requested Amount: \$0.00	Example test. Displays the budget narrative about the specific budget category

Figure 129: Save Budget Calculations and Narrative

Budget Tools

Add 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	↑ ↓ 🗹	' <u>+ </u>	Ĭ	_			
Total	Add a parent	New	Parent Category	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
	category.	New	Sub-Category				

Figure 130: Add Parent Category

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

	Budget Categories		
Type the name of the parent category.	BN Fringe	↑ ↓ Save the parent category.	2 + 1

Figure 131: Save Parent Category

Edit a Parent Category

- 1. Hover over a parent category to display the budget tools.
- 2. Click Edit 🗹.

	1	Expand All		
Click the blue arrow		▼Personnel	Edit the parent catego	ory.
to expand the list.		Project Director	2 + 🗑	

Figure 132: Edit Parent Category

- 3. Type in the new name for the parent category.
- 4. Click **Save .** The new parent category appears.



Figure 133: Save Parent Category

Delete a Parent Category

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

	Expand All		
		Delete the parent	category
Click the blue arrow	▼ Personnel	Delete the parent	category.
to expand the list.	- Terbonner		
	Project Director	🗹 + 📋	

Figure 134: Delete Parent Category

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



Figure 135: Warning to Delete Category

Add a Sub-Category

- 1. Click the blue arrow next to a parent category to expand the list.
- 2. Hover over a sub-category to display the budget tools.
- 3. Hover over **New** 🕂.
- 4. Click New sub-Category.

		Expand All		ver New to	Direct	
Click the blue		▼Personnel	add a su	b-category.	\$ 0.0	
arrow to	-	→ Project Director	ľ	+	\$ 0.0	
expand the list.		BN Project Coordinator		New sub-Catego	ry	
		BN Equipment		New sub-Sub-Ca	ategory	
		BN Supplies				
				Figure 13	6: Add	Sι

5. Type in the name of the sub-category.

6. Click **Save .** The sub-category is added to the grid.

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

Figure 137: Save Sub-Category

Edit a Sub-Category

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

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

Figure 138: Edit Sub-Category

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



Figure 139: Save Sub-Category

Delete a Sub-Category

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

	E	kpand All			
		kpanu Ali		Delete the sub-	catogory
Click the blue arrow		 Personnel 		Delete the sub-	-category.
to expand the list.					
to expand the list.		 Project Director 		🗹 + 💼 🛛	
			ŀ	igure 140: Delete S	Sub-Category

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

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

Figure 141: Warning to Delete Category

Add 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.

Click the blue	Expand All	Hover over New to add a sub-sub-category.	rect
	✓ Personnel		\$ 0.0
arrow to	Project Director	⊘ + ≘	\$ 0.0
expand the list.	BN Project Coordinator	New sub-Category	
	BN Equipment	New sub-Sub-Cated	lorv
	BN Supplies	How out out out out	,
		Figure 142: Add Sub-	Sub-Cat

ub estagon/

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

Expand All			
✓ Personnel	Save the sub	-sub-categ	orv.
✓ Project Director	Save the sub	Jub categ	01 y .
Type the name of the sub-sub-sub-sub-sub-sub-sub-sub-sub-sub-	ub-category.		
	F	igure 143: S	ave Su

Edit 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 🗹.



Figure 144: Edit Sub-Sub-Category

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

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Figure 145: Save Sub-Sub-Category

Delete a Sub-Sub-Category

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



Figure 146: Delete Sub-Sub-Category

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



Figure 147: Warning to Delete Category

Budget Tools

Move a Category Up or Down on the Grid

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

Click **Move Down** \checkmark to move the 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

Figure 148: Category Commands