

GrantVantage[®]



Applicant Instructions

Table of Contents

Table of Contents.....	2
Login.....	4
Register an Applicant Profile.....	6
Homepage.....	9
Site Map.....	10
Funding Announcement.....	11
Save an Announcement.....	12
Print the Announcement as a PDF.....	13
View Attachments associated with the Announcement.....	13
Submitting an Announcement.....	14
My Submitted Application.....	26
View Reports.....	26
My Applicant Profile.....	28
Users.....	39
Create a User.....	42
Edit a User.....	45
Activate a User.....	46
Deactivate a User.....	47
Contacts.....	48
Add a Contact.....	48
Edit a Contact.....	51
Delete a Contact.....	52
Documents.....	53
Add a Document.....	53
Delete a Document.....	54
Objective Tools.....	56
Add a Goal.....	59
Add an Objective.....	60
Add a Performance Measure.....	61
Add a Grant Activity.....	62
Edit an Objective.....	63

Edit a Performance Measure	64
Edit a Grant Activity	65
Delete an Objective.....	66
Delete a Performance Measure	67
Delete a Grant Activity	68
Budget Tools	69
Add Budget Calculations and Budget Narratives.....	70
Add a Parent Category	72
Edit a Parent Category	72
Delete a Parent Category.....	73
Add a Sub-Category	74
Edit a Sub-Category.....	74
Delete a Sub-Category	75
Add a Sub-Sub-Category	76
Edit a Sub-Sub-Category	76
Delete a Sub-Sub-Category	77
Move a Category Up or Down on the Grid	78

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.

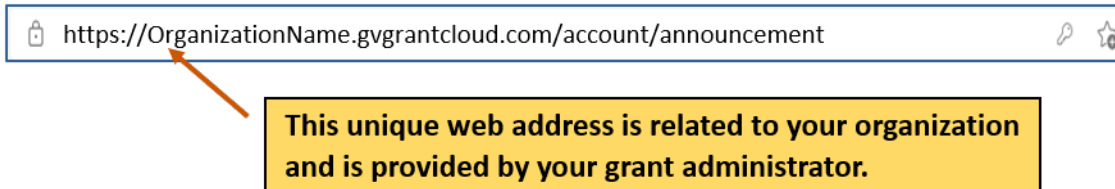


Figure 1: GrantVantage URL

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

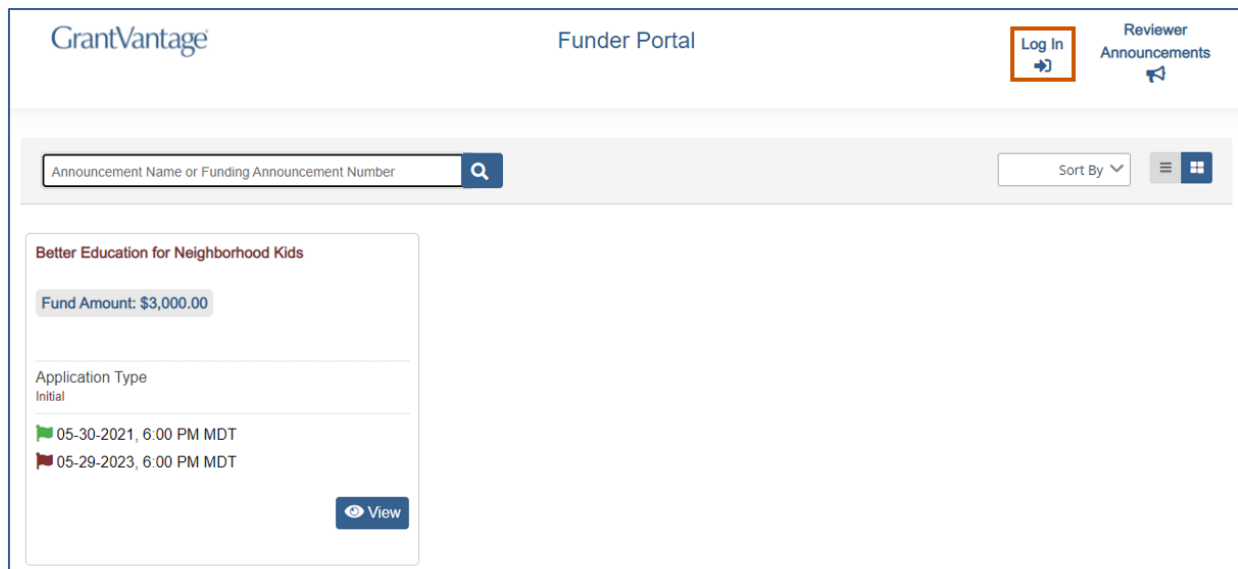


Figure 2: Public Facing Page

4. Enter login credentials and select **Log In**.

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.

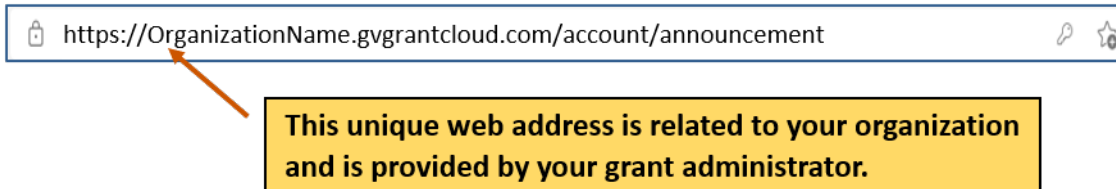


Figure 4: GrantVantage URL

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

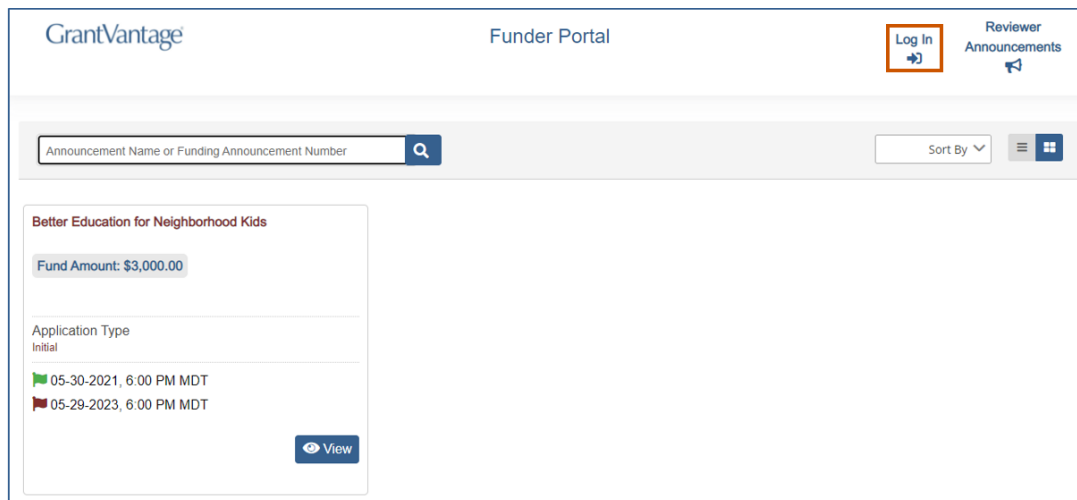


Figure 5: Public Facing Page

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

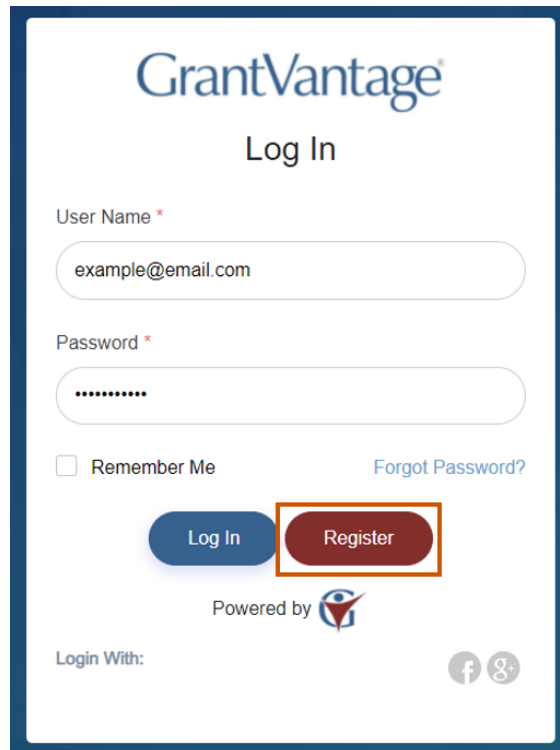



Figure 6: Register Profile

5. Fill in the necessary fields.
Note: The black asterisks indicate required fields.
6. Click  **Submit**. You are logged in, and the GrantVantage Funder Portal homepage appears. The homepage displays all available funding announcements. Applicants may navigate the system by using the site map.

Applicant Registration

This field is required.

This field is required.

This field is required.

Please prove you are not a robot

I'm not a robot
reCAPTCHA
Privacy - Terms

✕ Cancel

✓ Submit

Figure 7: Applicant Registration

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.

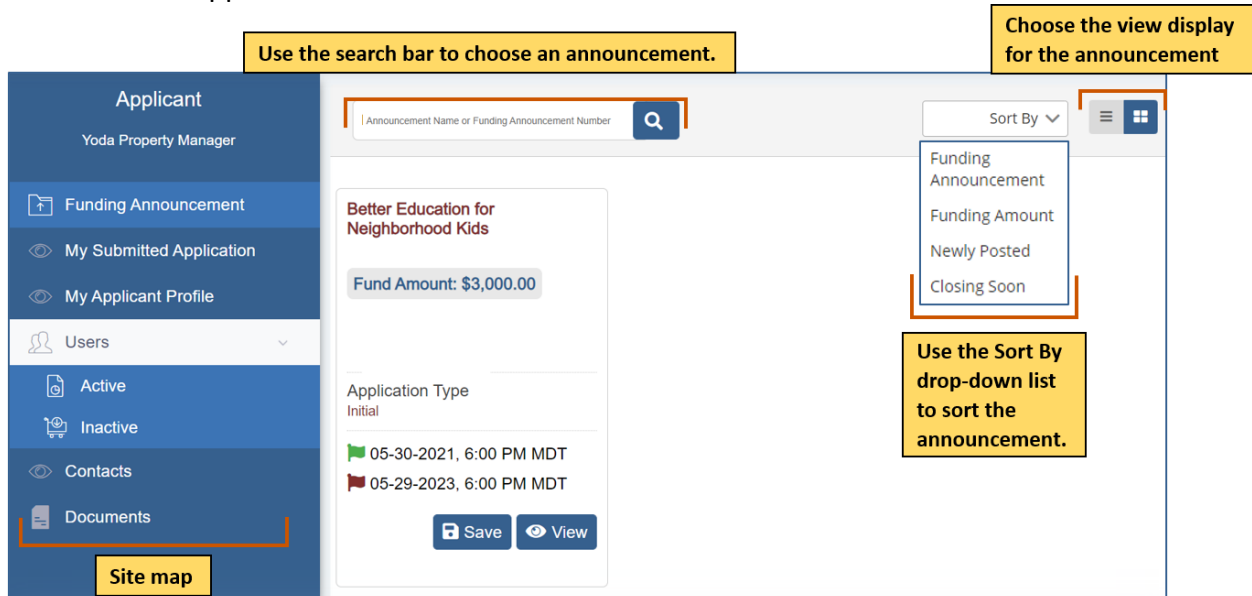


Figure 8: Homepage Screen 1

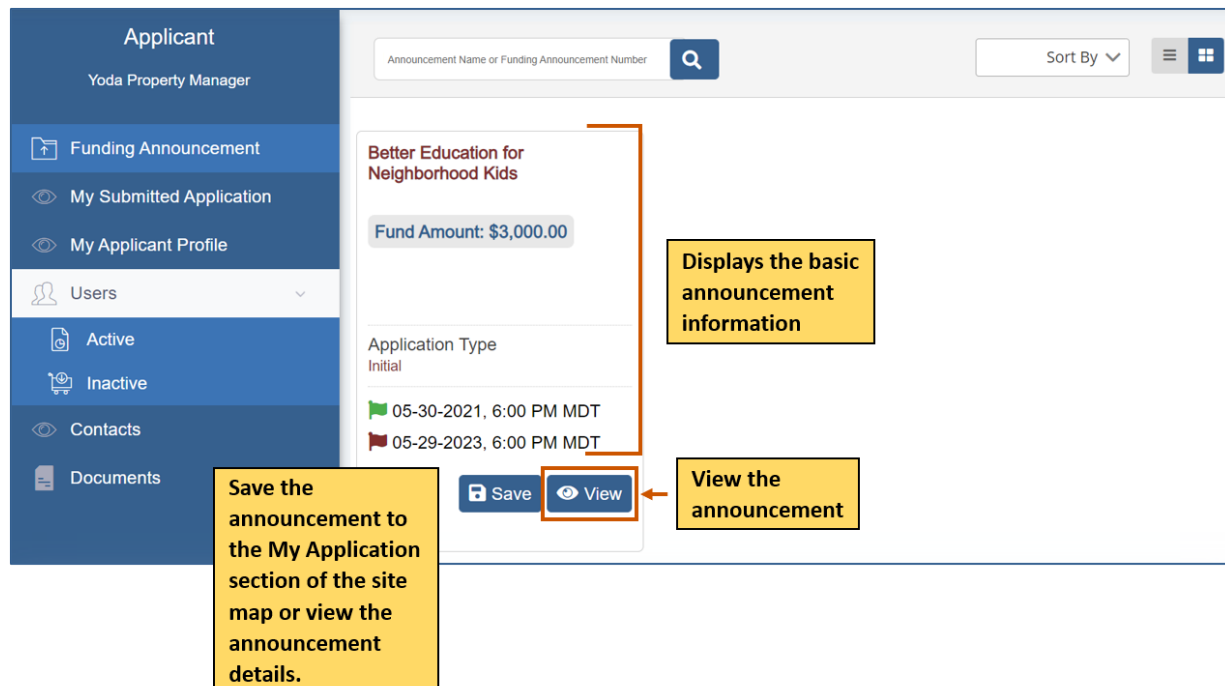


Figure 9: Homepage Screen 2

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 announcements you have saved and/or applied to.
 My Submitted Application	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.
 My Applicant Profile	Users 	
 Users ▼	Active 	View the active users related to the application.
 Active	Inactive 	View the active users related to the application.
 Inactive	Contacts 	View the contacts related to the application.
 Contacts	Documents 	View documents related to the application.
 Documents		

Table 1: Site Map

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.



Figure 10: Funding Announcement Screen 1

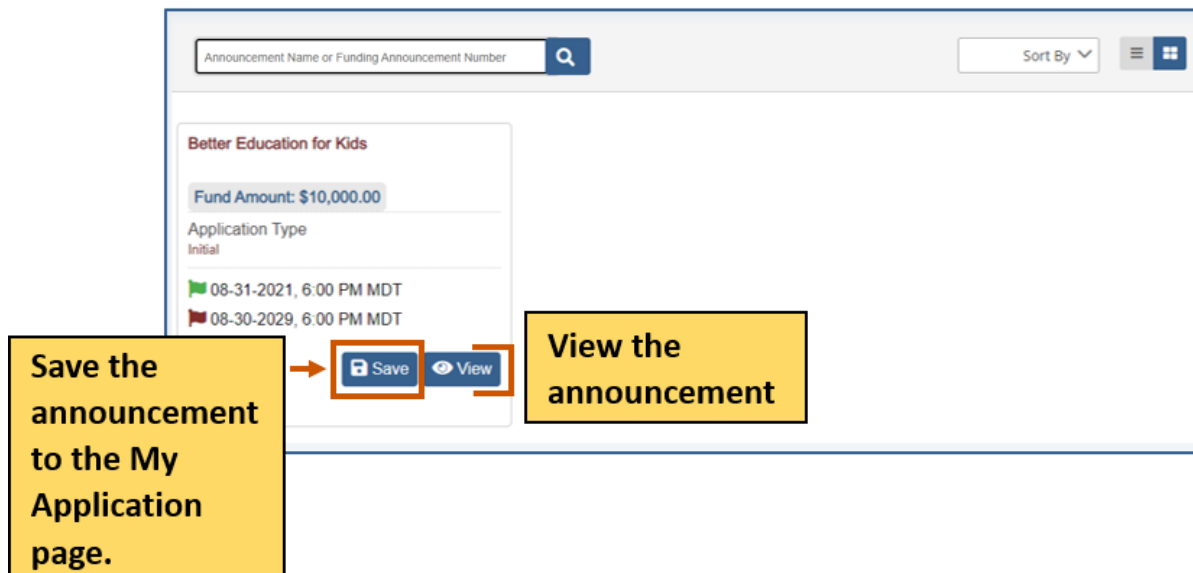



Figure 11: Funding Announcement Screen 2

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.

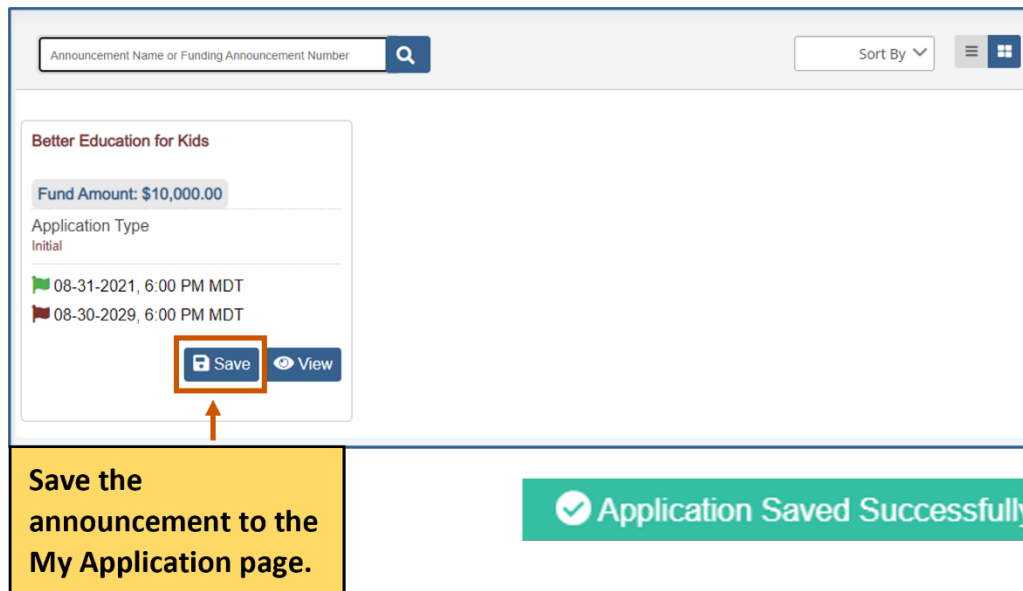


Figure 13: Save Announcement

Print the Announcement as a PDF

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



Figure 14: Print PDF Funding Announcement

View Attachments associated with the Announcement

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

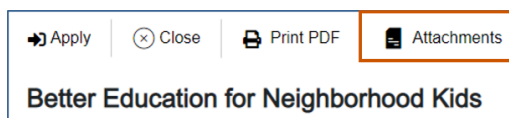



Figure 15: View Attachments

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

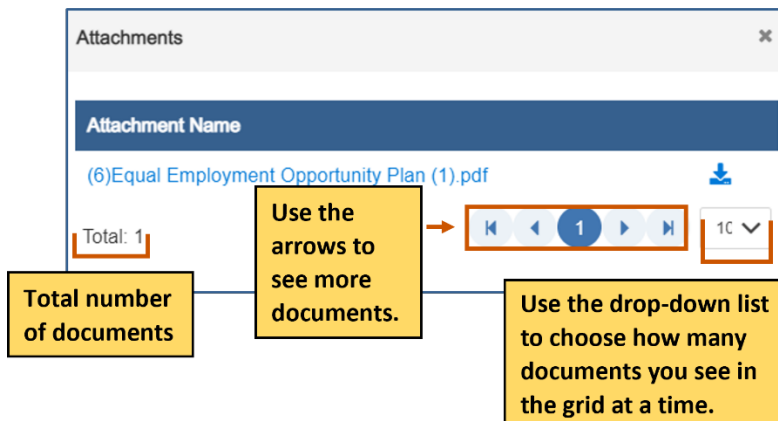


Figure 16: Attachments Dialog Box 1

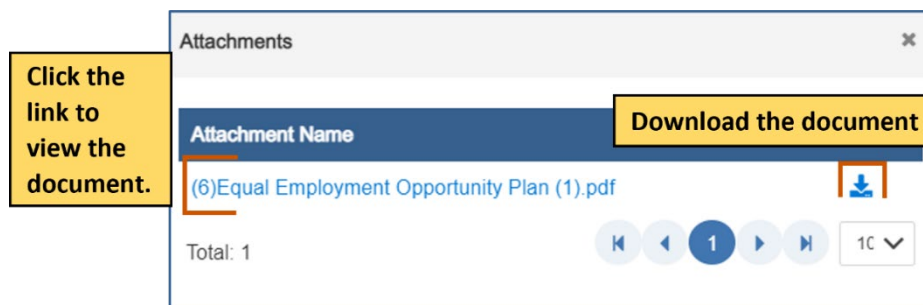



Figure 17: Attachments Dialog Box 2

Submitting an Announcement

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

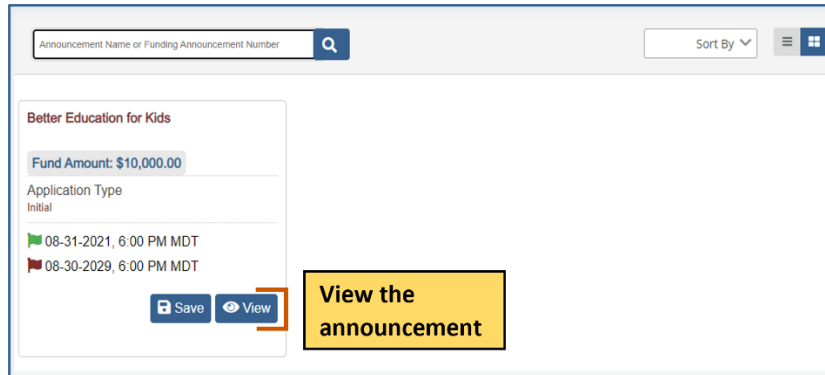


Figure 18: View Announcement

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

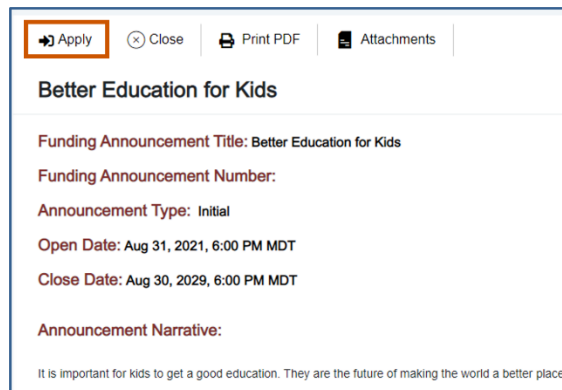


Figure 19: Apply to Announcement

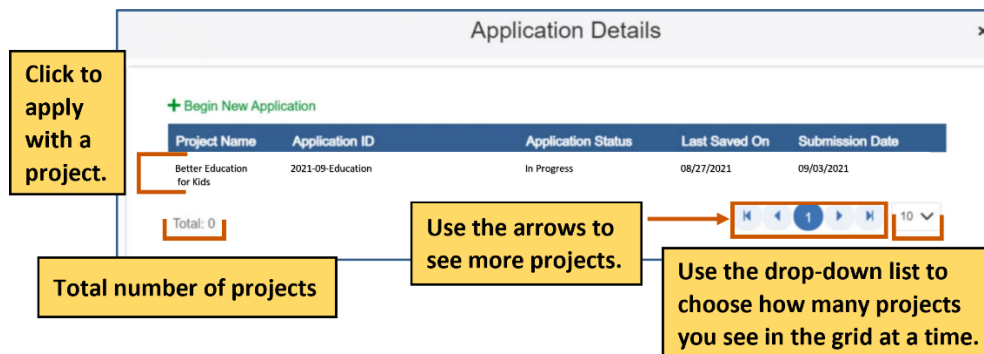



Figure 20: Application Details Dialog Box

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

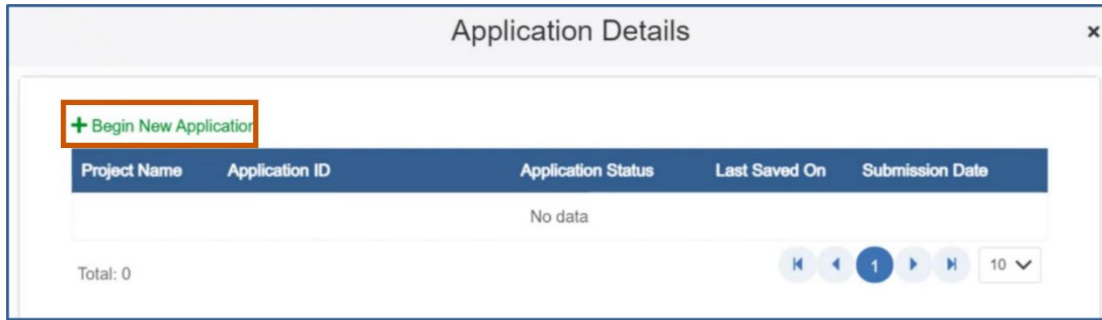



Figure 21: Begin New Application

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

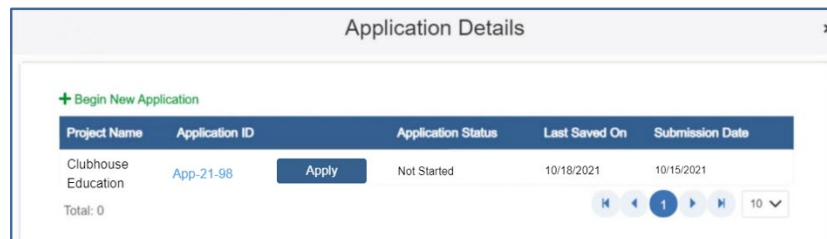
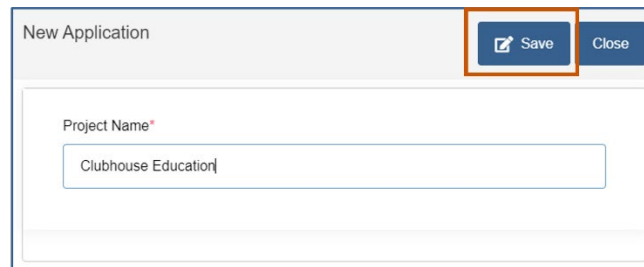


Figure 22: New Application Dialog Box

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

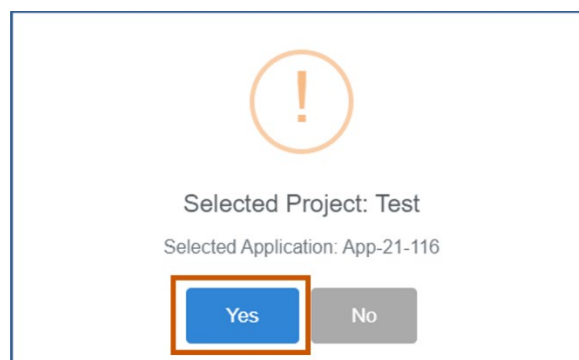


Figure 23: Warning Choose Project

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

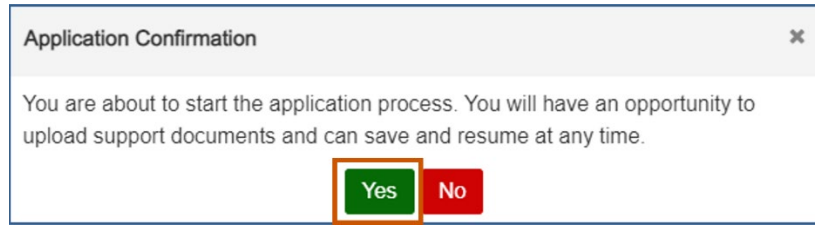


Figure 24: Application Confirmation Dialog Box

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.

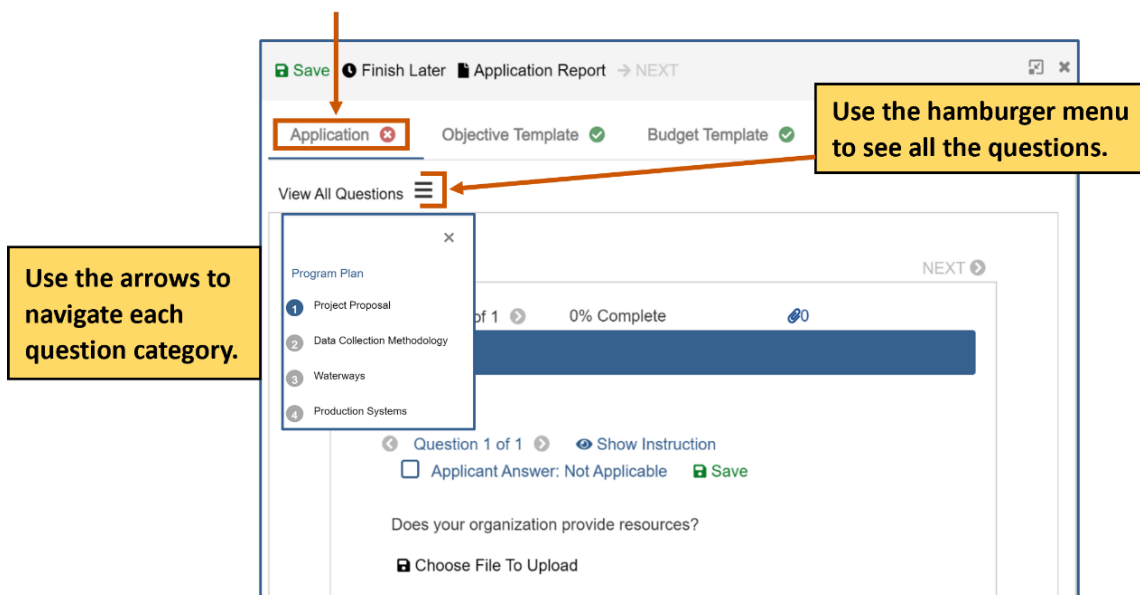


Figure 25: Use Hamburger Menu

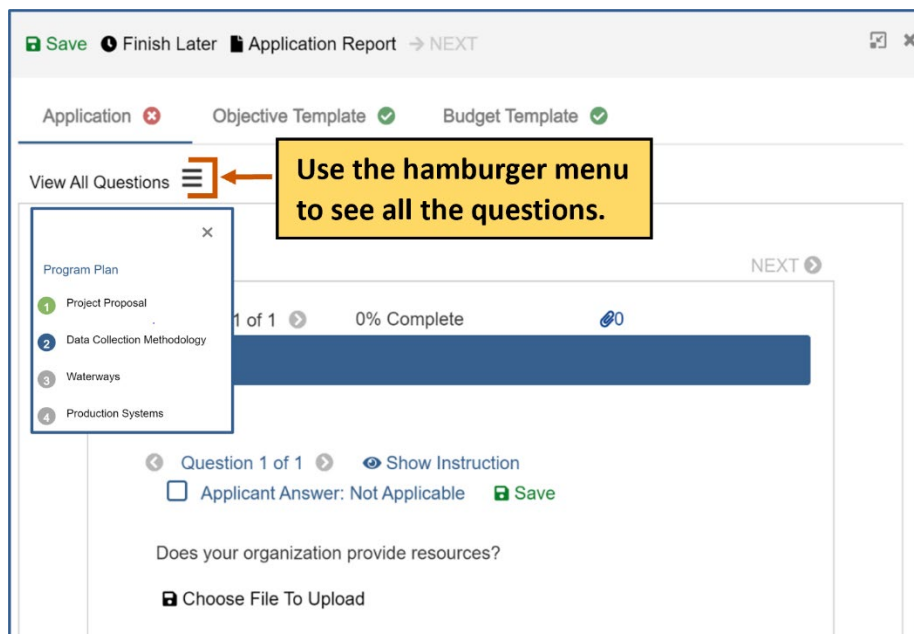


Figure 26: Humber Menu Status

b. Use the arrows to navigate the questions

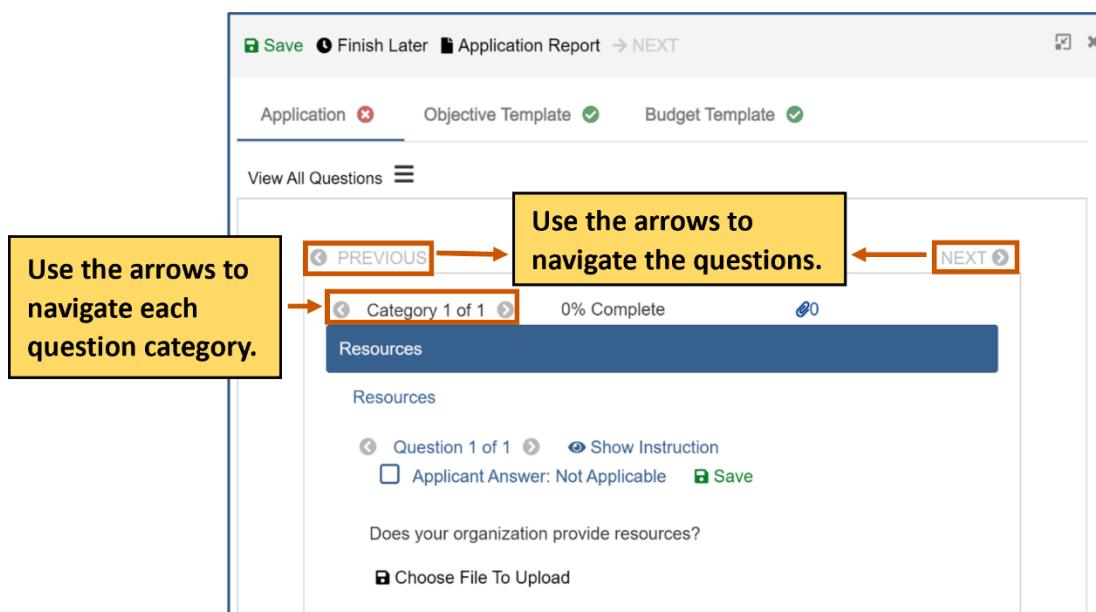



Figure 27: Use Arrows through Questions

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.

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

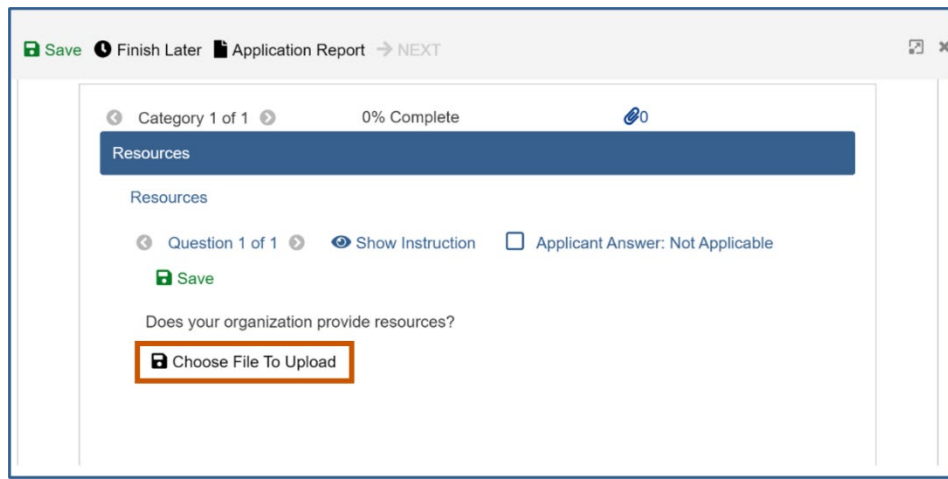


Figure 28: Add Attachment to Question

- ii. Choose from the picklist.

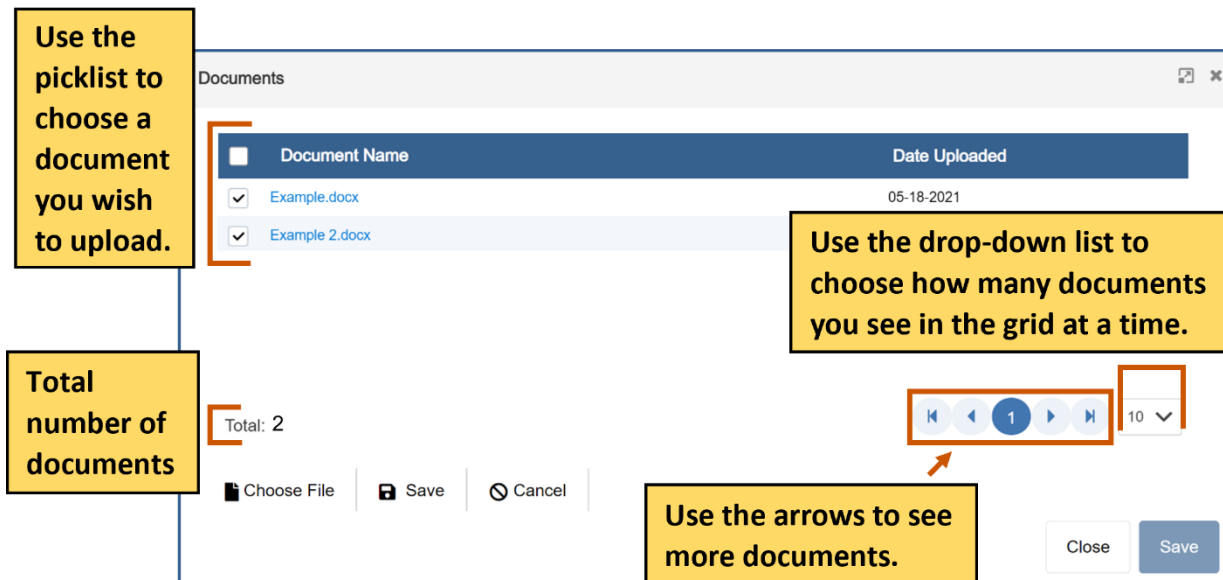



Figure 29: Choose Attachment for Question

Or

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

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

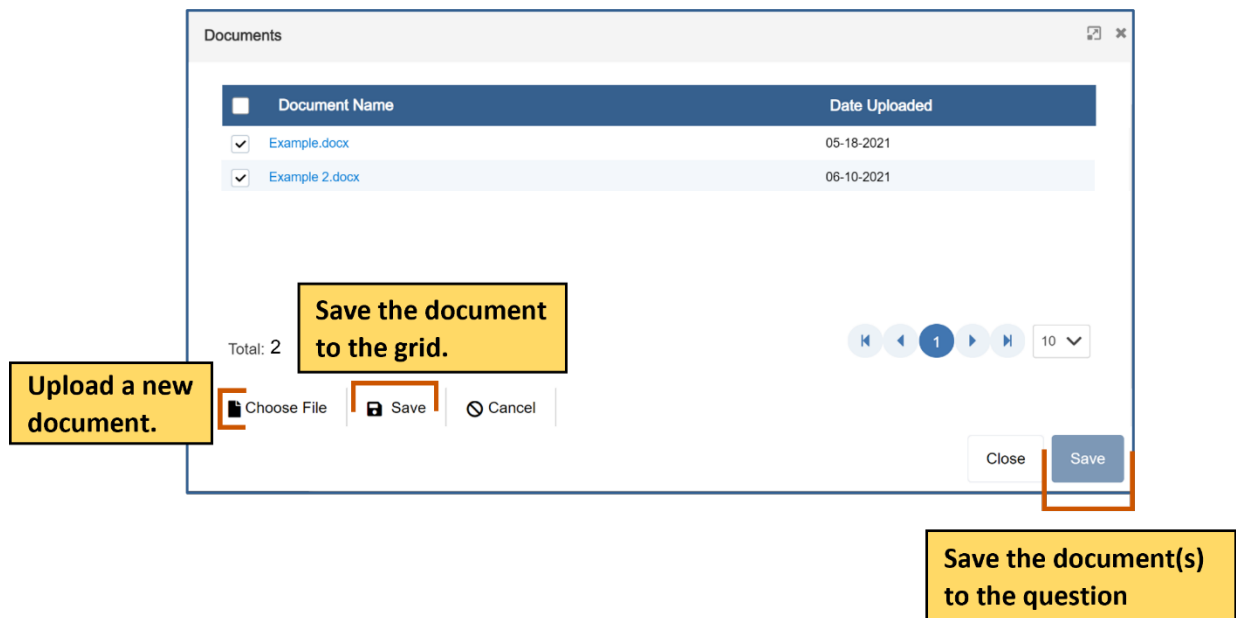


Figure 30: Upload Attachment

Make sure all questions are complete.

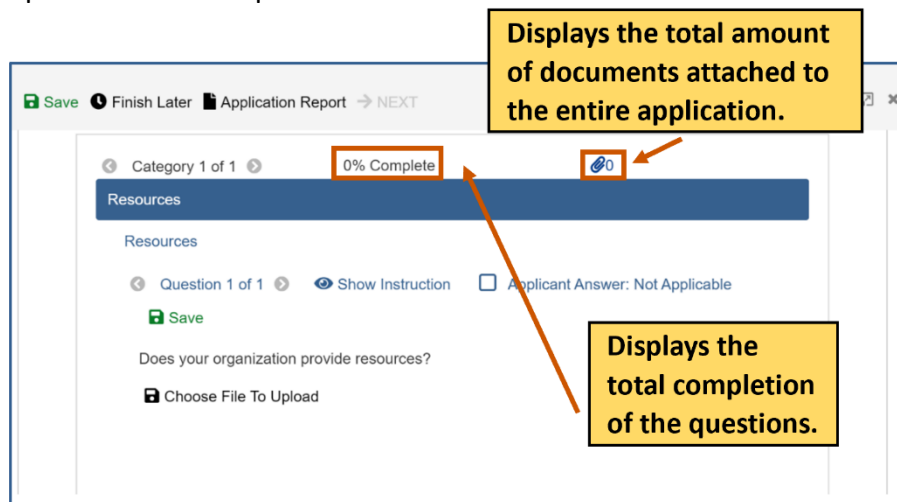


Figure 31: Question Completion

Complete the Objective Template:

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

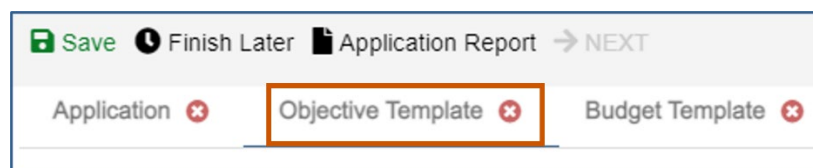


Figure 32: Complete Objective Template

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

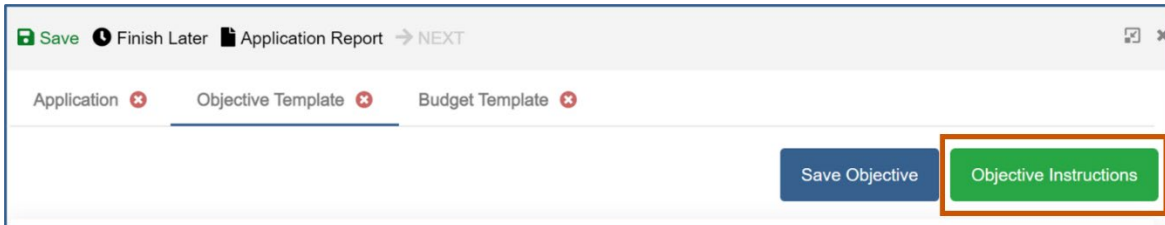




Figure 33: View Objective Instructions

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

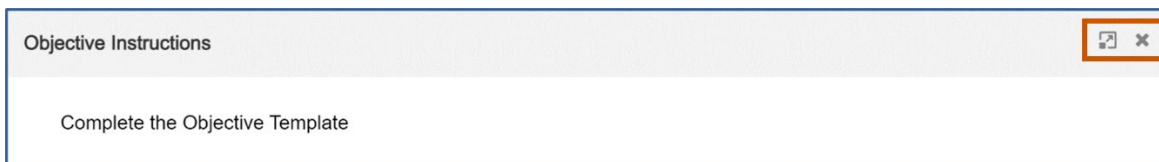




Figure 34: Maximize or Save Objective Instructions

- 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](#).

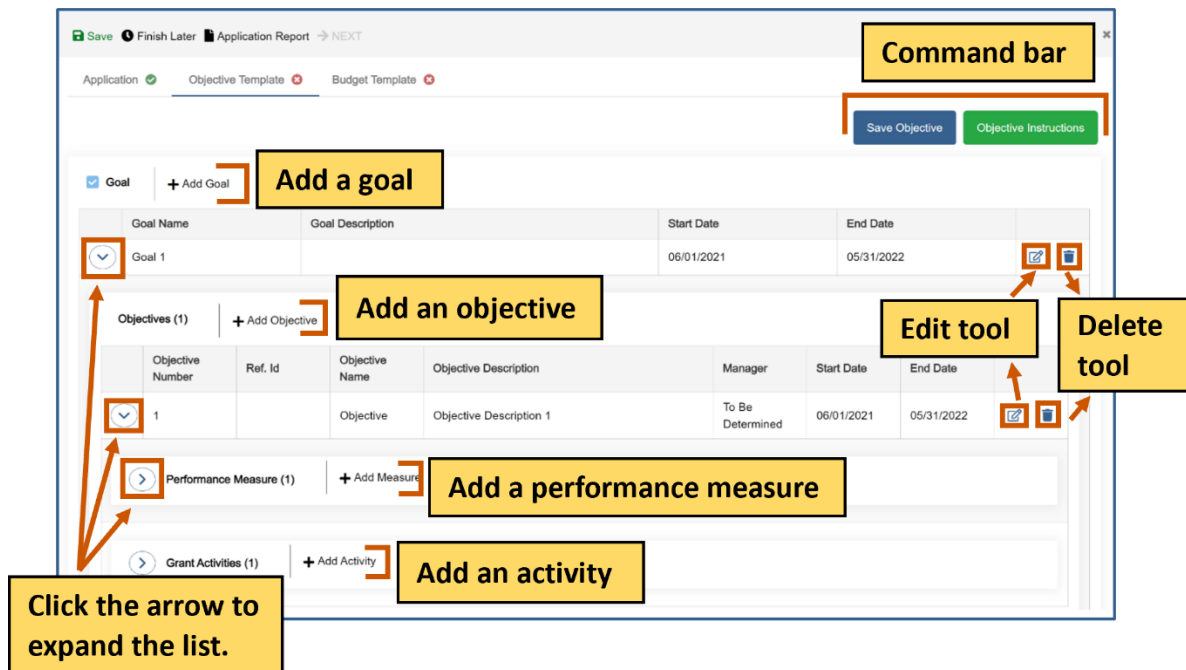


Figure 35: Objective Template

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.

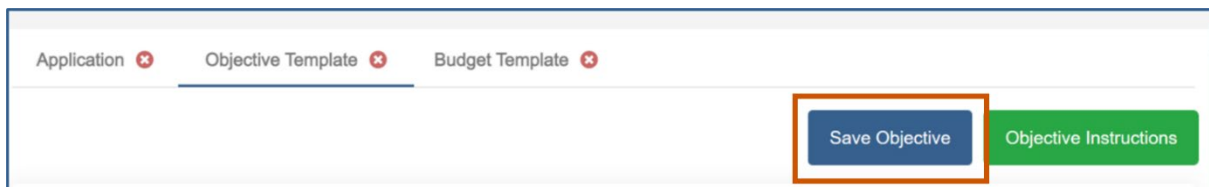


Figure 36: Save Objective Template

- 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.

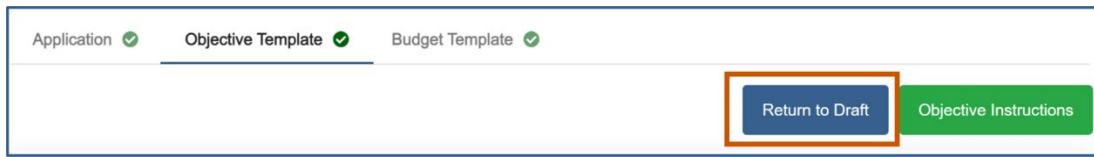


Figure 37: Return Objective Template to Draft

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 [Budget Tools](#).

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

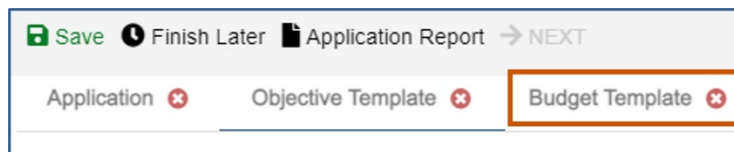


Figure 38: Complete Budget Template

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

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

The screenshot shows the Budget Template interface. At the top, there is a 'Year' dropdown menu set to 'Year 1' (highlighted with an orange box) and buttons for 'Save Budget' and 'Budget Instructions' (highlighted with an orange box). Below this is a table with columns: 'Direct', 'Cash Match', 'In-Kind Match', 'Total', and 'Leveraged'. The table has a tree view on the left with categories like 'Personnel', 'Equipment', 'Supplies', and 'Travel'. A 'Budget tools' box (highlighted with an orange box) is overlaid on the tree view, showing options to add, edit, or delete categories. A yellow callout box points to the table cells, stating 'Type in amount in cells that are white.' Another yellow callout box points to a green 'BN' symbol next to a category, stating '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.

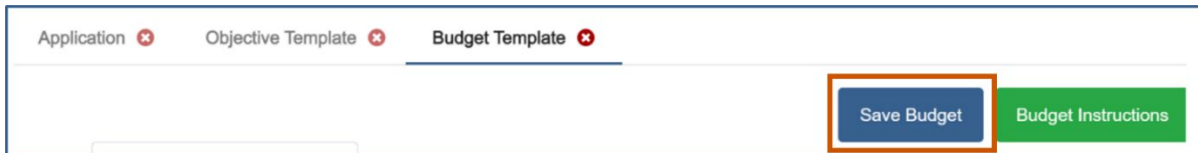


Figure 40: Save Budget Template

- 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.

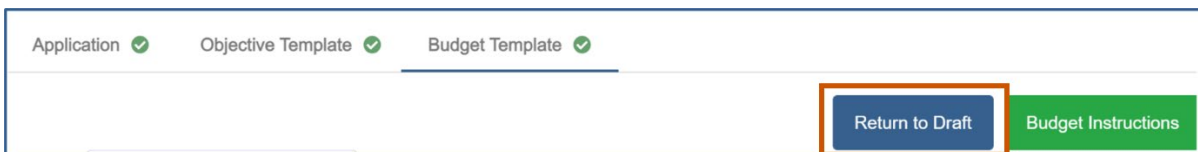


Figure 41: Return Budget Template to Draft

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.



Figure 42: Finish Application Process

- 11. Click **Save & Continue**.

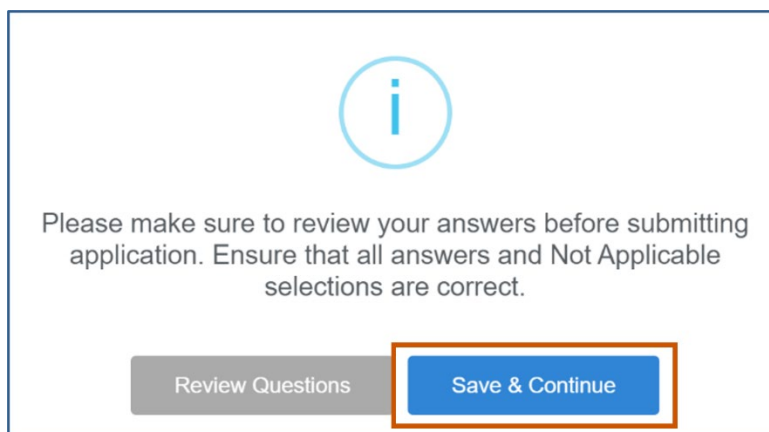


Figure 43: Warning to Check Questions

- 12. Fill in the necessary fields.
 - Note:** The red asterisks indicate required fields.

Figure 44: Project Information

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.

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

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

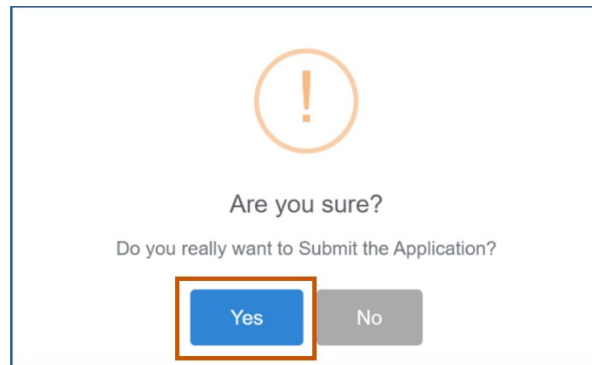


Figure 47: Warning to Submit Application

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.

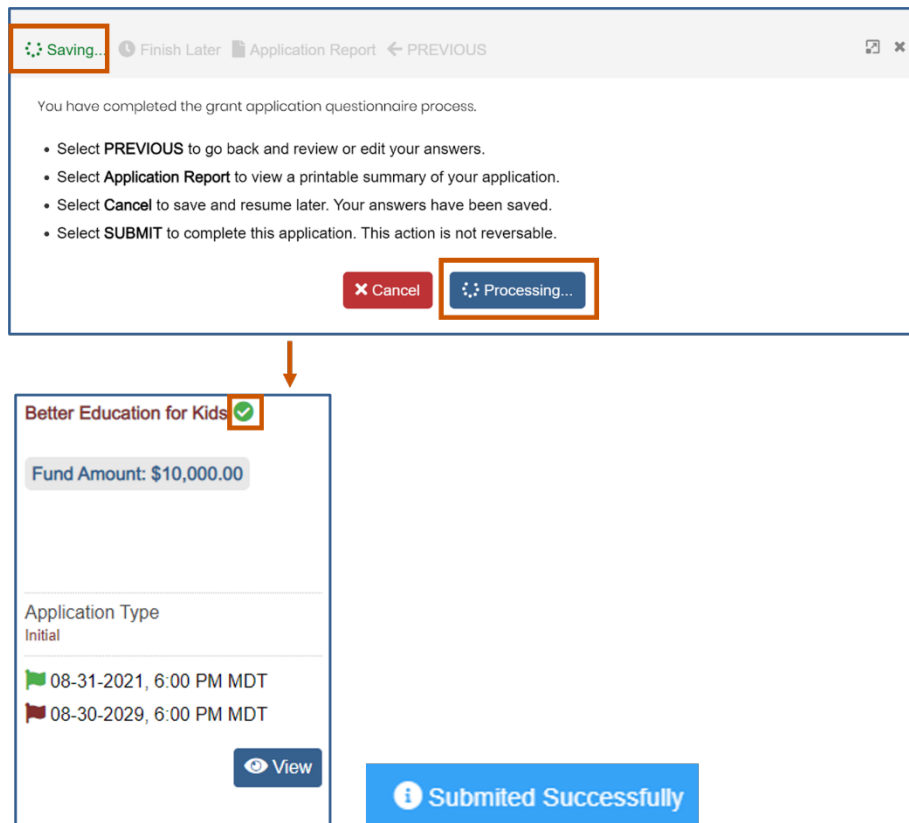


Figure 48: Submit Successful

My Submitted Application

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

Click the blue arrow to show the application, objective, and budget reports. Click the red arrow to collapse the report list.

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 Type	Report Creation Date
Application Report	Original Application Report	10/15/2021
Objective Report	Original Objective Report	10/15/2021
Budget Report	Original Budget Report	10/15/2021

Figure 49: My Submitted Application Screen

View Reports

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

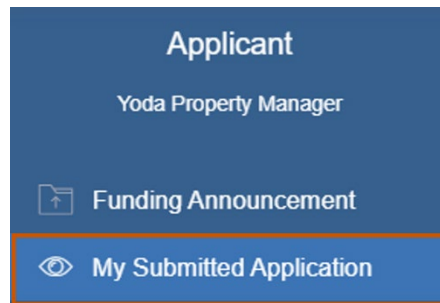


Figure 50: My Site – My Submitted Application

- Click the blue arrow to show the application, objective, and budget reports.

Click the blue arrow to show the application, objective, and budget reports. Click the red arrow to collapse the report list.

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 Type	Report Creation Date
Application Report	Original Application Report	10/15/2021
Objective Report	Original Objective Report	10/15/2021
Budget Report	Original Budget Report	10/15/2021

Total: 1

Figure 51: My Submitted Application Screen

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

Click the link to one of the reports.

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 Type	Report Creation Date
Application Report	Original Application Report	10/15/2021
Objective Report	Original Objective Report	10/15/2021
Budget Report	Original Budget Report	10/15/2021

Total: 1

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  **My Applicant Profile**. The Applicant Profile page appears.

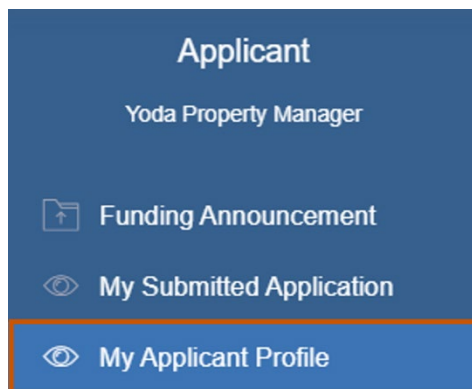



Figure 53: Site Map – My Applicant Profile

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

My Applicant Profile : Yoda Property Manager

< Organization Information Address Users Contact >

Organization Name *
Yoda Property Manager

Organization Type
Nonprofit

Website URL

Fax Number

EIN

DUNS Number

Main Phone
+13031231234

Save

Figure 54: My Applicant Profile – Organization Information Tab

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

Figure 55: My Applicant Profile – Address Tab

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

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

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 Award Status

+ New **Add user**

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

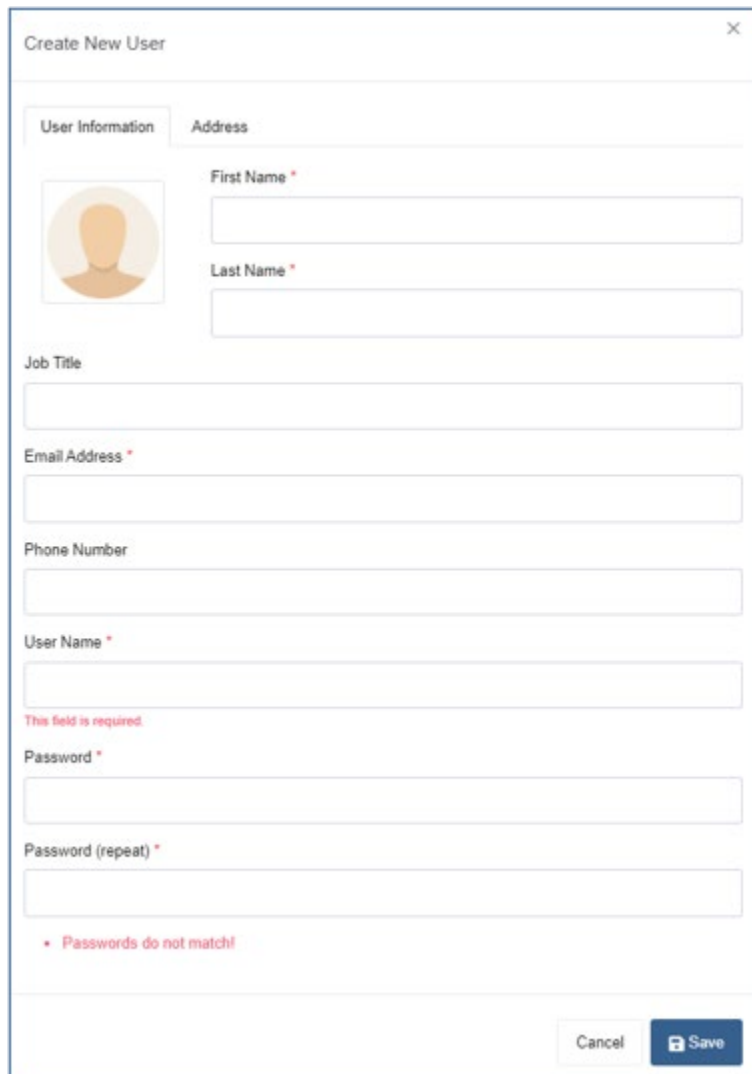
Total: 2

1 10

Save

Figure 57: Add User


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



The screenshot shows a 'Create New User' dialog box with two tabs: 'User Information' (selected) and 'Address'. The 'User Information' tab contains the following fields and elements:

- A profile picture placeholder (a circle with an orange silhouette).
- 'First Name *' text input field.
- 'Last Name *' text input field.
- 'Job Title' text input field.
- 'Email Address *' text input field.
- 'Phone Number' text input field.
- 'User Name *' text input field.
- A red error message: 'This field is required.' below the 'User Name' field.
- 'Password *' text input field.
- 'Password (repeat) *' text input field.
- A red error message: 'Passwords do not match!' below the 'Password (repeat)' field.
- 'Cancel' and 'Save' buttons at the bottom right.

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.

Saved Successfully.

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.

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

Figure 60: Create New User – Contact Tab

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

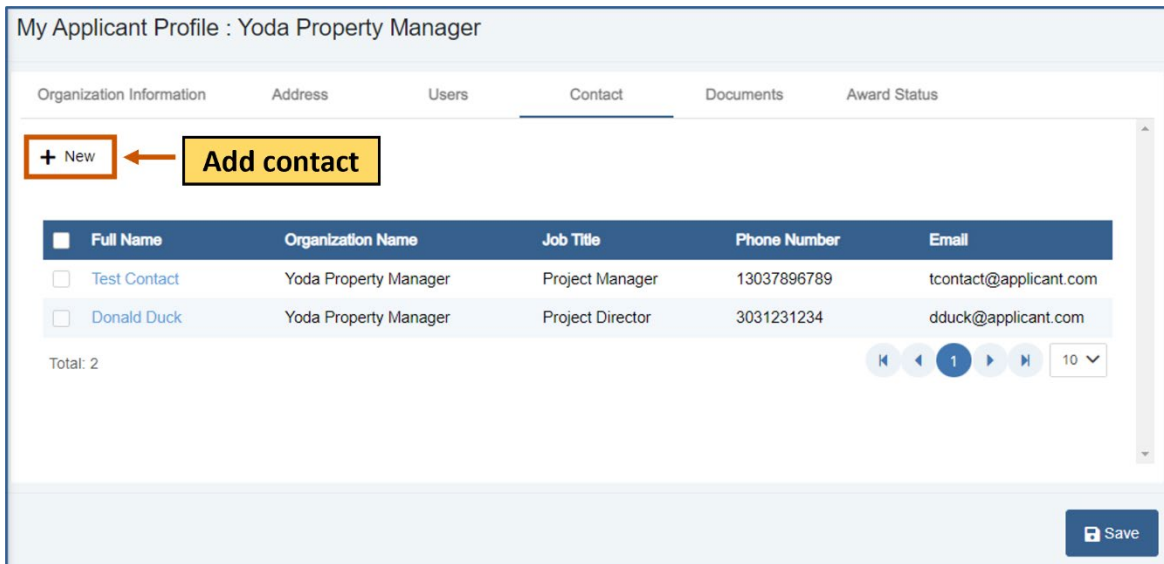


Figure 61: Add Contact

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

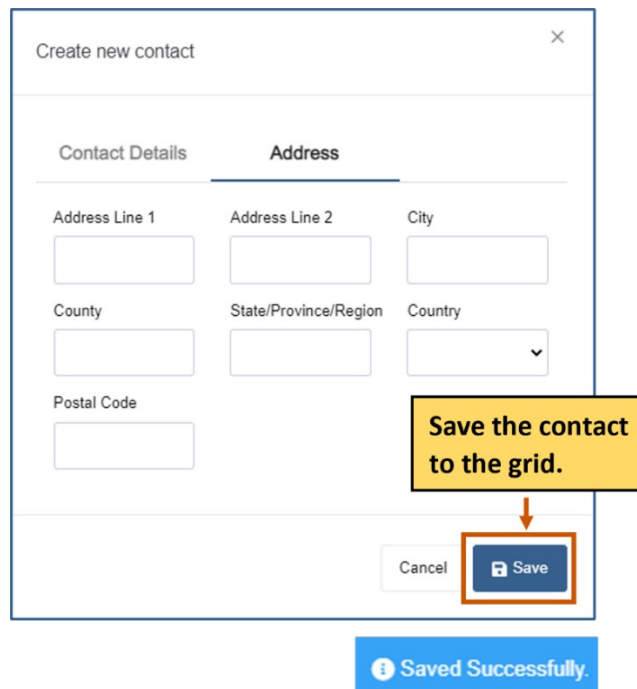
Create new contact ✕

Contact Details Address

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Job Title *	Email *
<input type="text"/>	<input type="text"/>
Phone Number *	Fax Number
<input type="text"/>	<input type="text"/>

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.



Create new contact

Contact Details **Address**

Address Line 1 Address Line 2 City

County State/Province/Region Country


Postal Code

Cancel Save

Save the contact to the grid.

Saved Successfully.

Figure 63: Create New Contact – Address Tab

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.

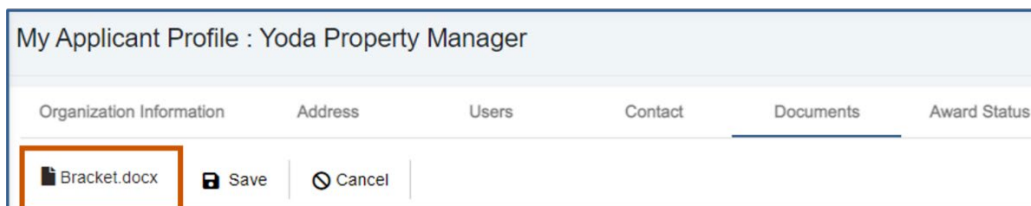
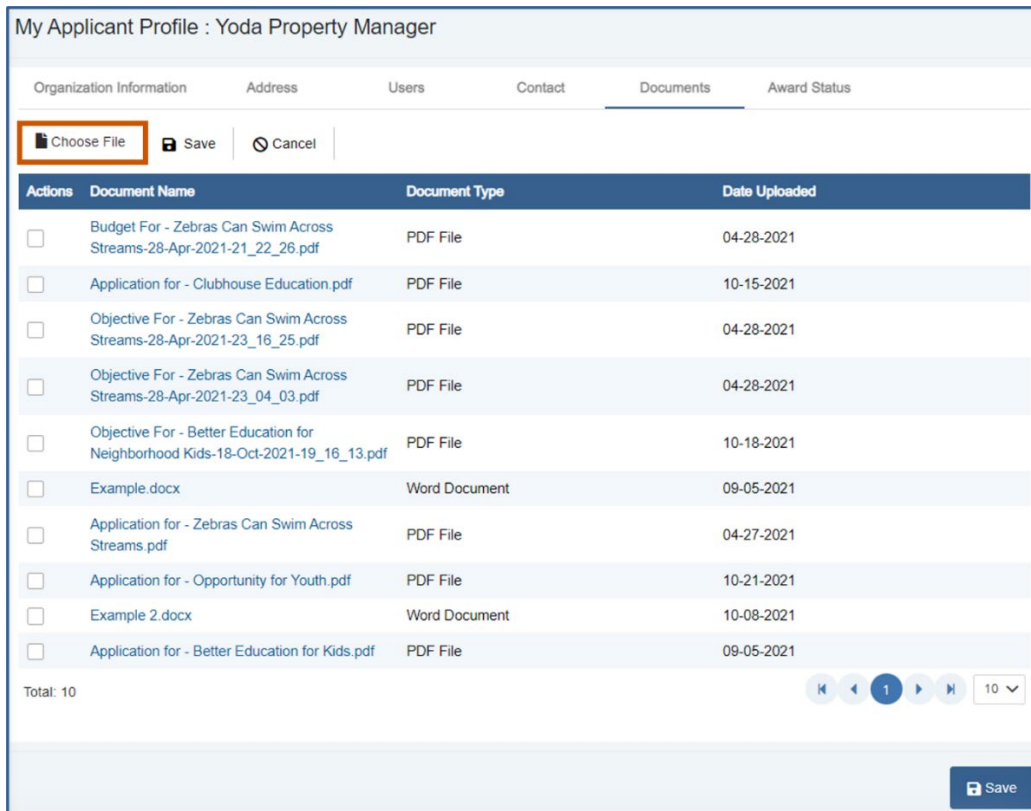


Figure 64: Add Attachment to Profile

- 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.

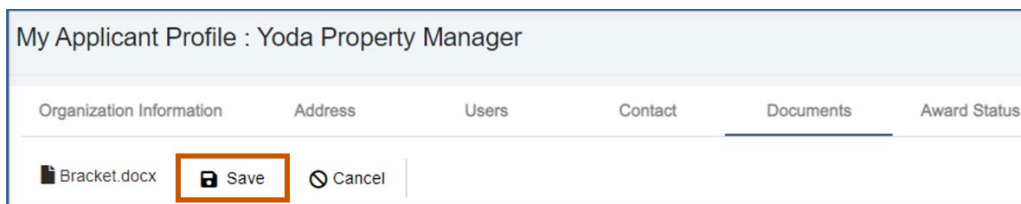


Figure 65: Save Attachment to Profile

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

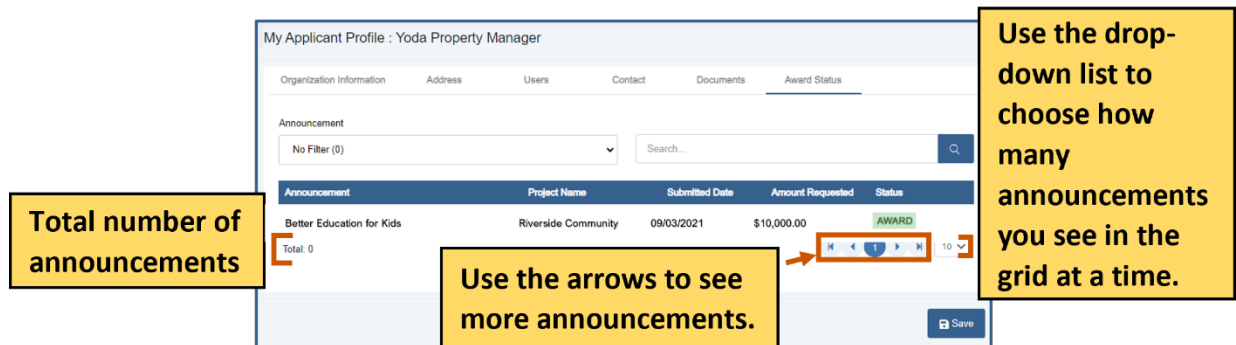


Figure 66: Create New Contact – Award Status Tab

- 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.

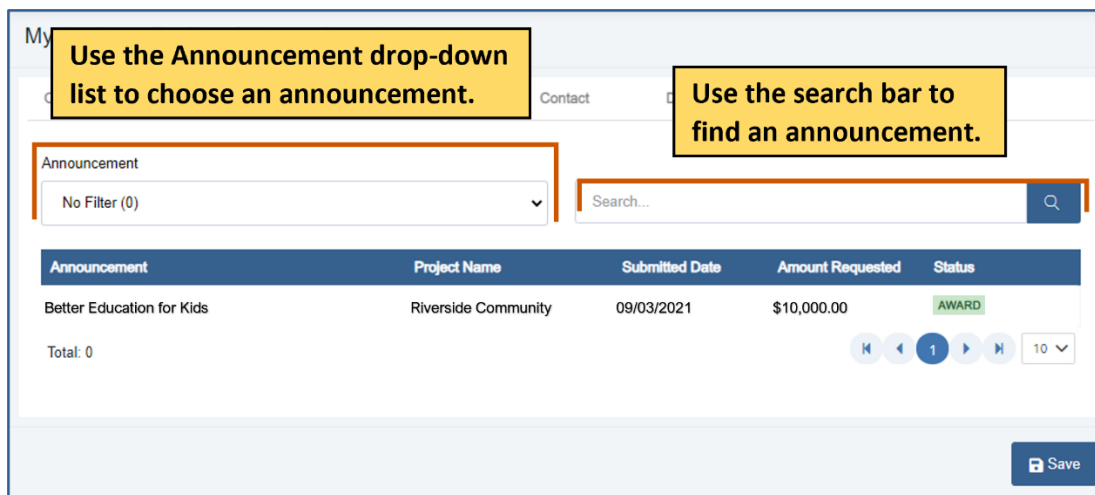




Figure 67: Choose Announcement

- 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 : Yoda Property Manager


Organization Information Address Users Contact Documents Award Status

Announcement

No Filter (0) Search... 

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

Total: 0  10

Save the applicant profile. 

 Saved Successfully.

Figure 68: Save Applicant Profile

Users

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

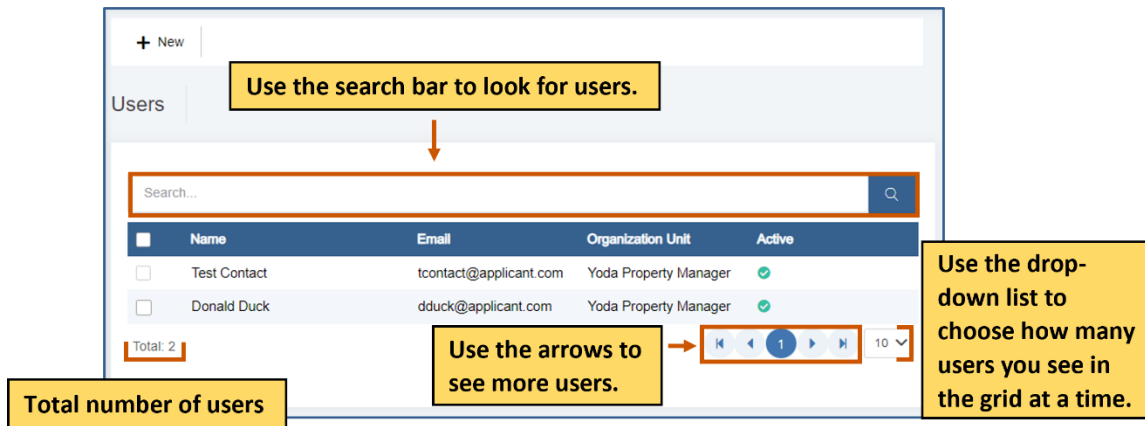


Figure 69: Active Users Screen

Active

You can view active users.

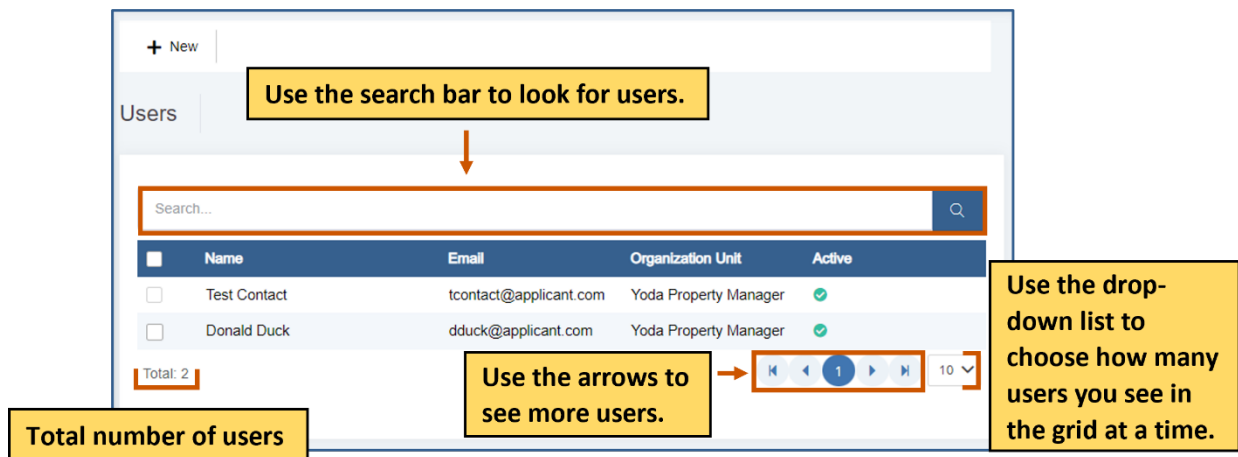




Figure 70: Active Users Screen

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

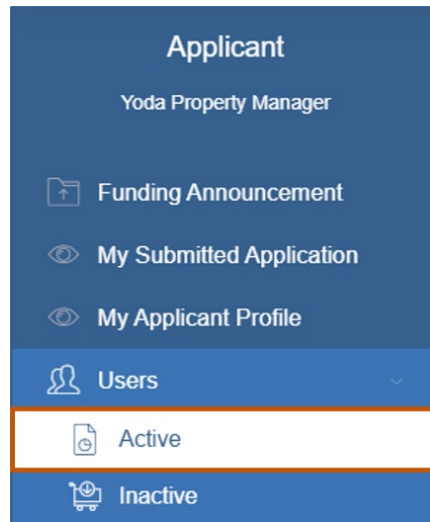


Figure 71: Site Map – Active Users

Inactive

You can view inactive review panels.

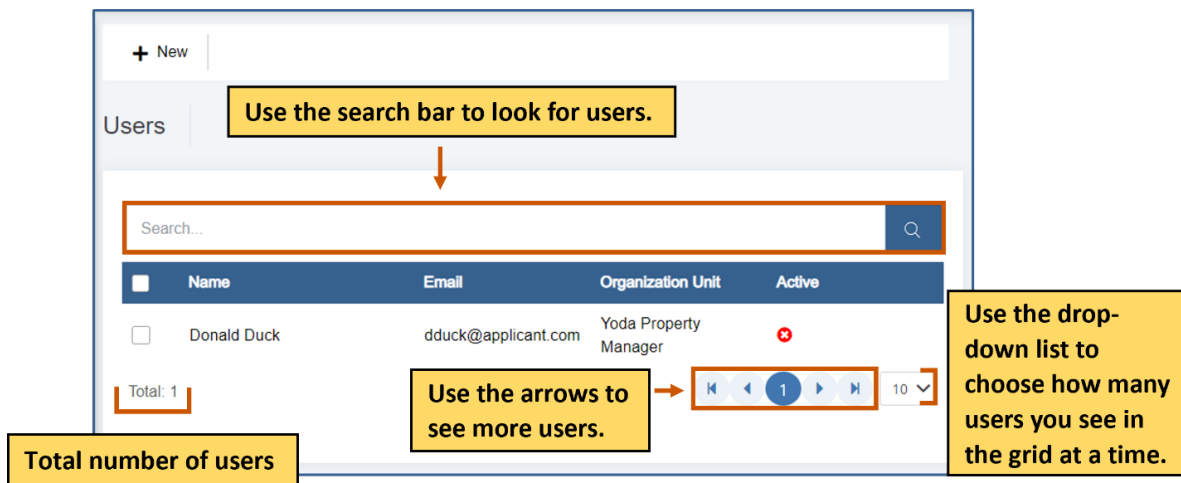


Figure 72: Inactive Users Screen

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

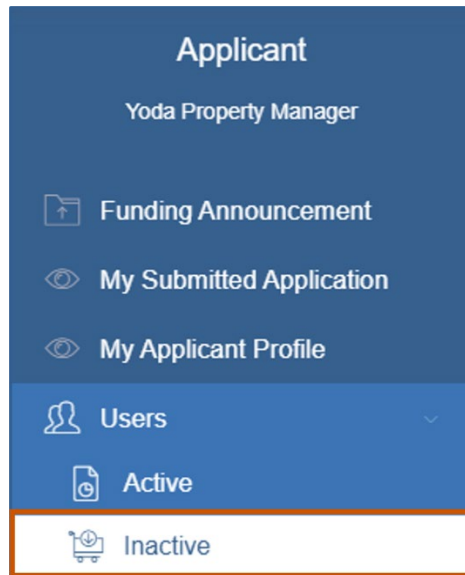




Figure 73: Site Map – Inactive Users

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.

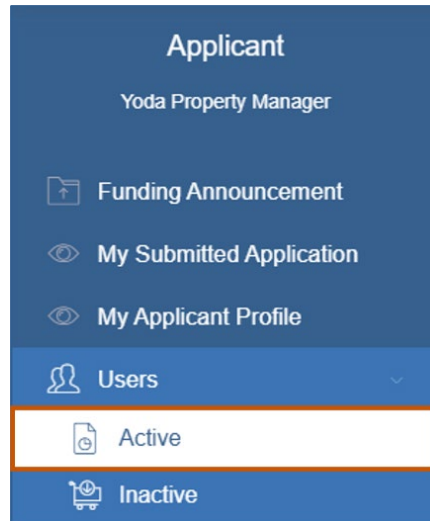


Figure 74: Site Map – Active Users

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

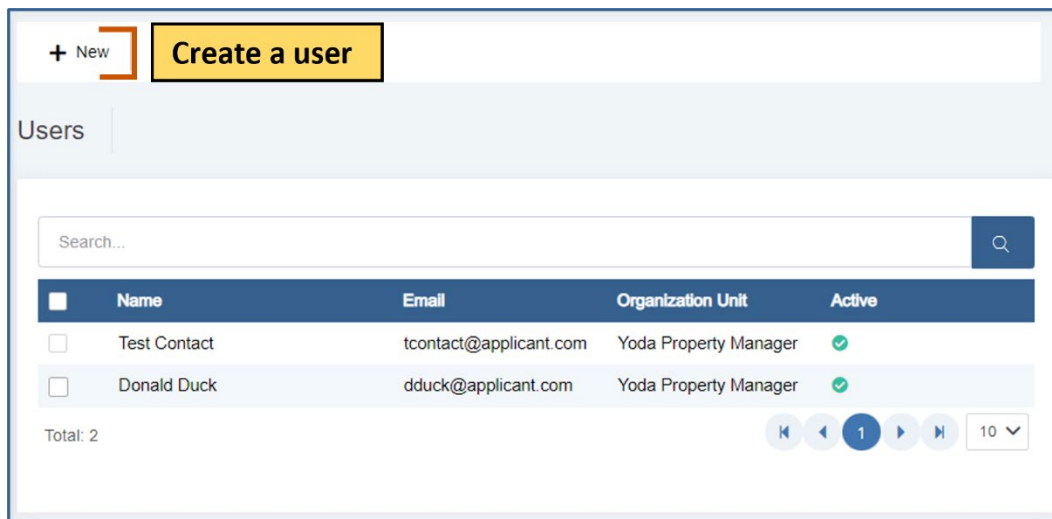




Figure 75: Create User

Under the Active column:

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

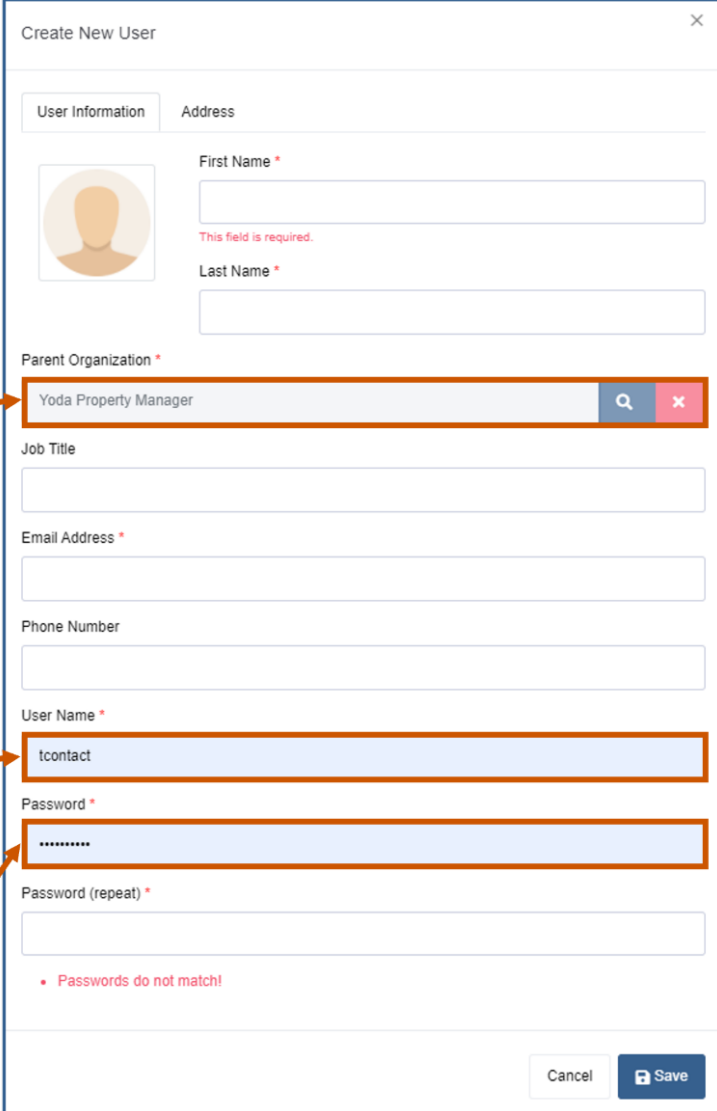
3. On the User information tab, fill in the necessary fields.

i Note: The red asterisks indicate required fields.

Use the search icon to add a parent organization. The default is the organization you are viewing.

The default username is the user you are currently logged in to.

The default password is the user's password you are currently logged in to.




The screenshot shows a 'Create New User' form with two tabs: 'User Information' and 'Address'. The 'User Information' tab is active. The form contains the following fields and elements:

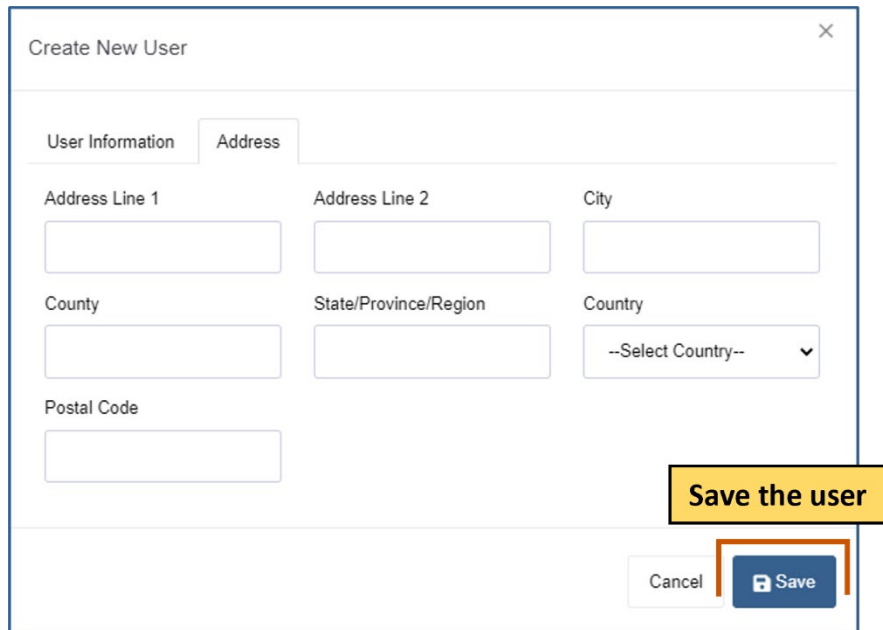
- First Name ***: A text input field with a red asterisk and a red error message below it: "This field is required."
- Last Name ***: A text input field with a red asterisk.
- Parent Organization ***: A dropdown menu with "Yoda Property Manager" selected. It includes a search icon and a close icon.
- Job Title**: A text input field.
- Email Address ***: A text input field with a red asterisk.
- Phone Number**: A text input field.
- User Name ***: A text input field containing "tcontact" with a red asterisk.
- Password ***: A text input field containing "....." with a red asterisk.
- Password (repeat) ***: A text input field with a red asterisk. Below it is a red error message: "Passwords do not match!".
- Buttons**: "Cancel" and "Save" buttons at the bottom right.

Figure 76: User Screen – User Information Tab

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

i 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.



Create New User

User Information Address

Address Line 1 Address Line 2 City

County State/Province/Region Country

Postal Code

Cancel Save

Save the user


 Saved Successfully.

Figure 77: Create New User – Address Tab

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.

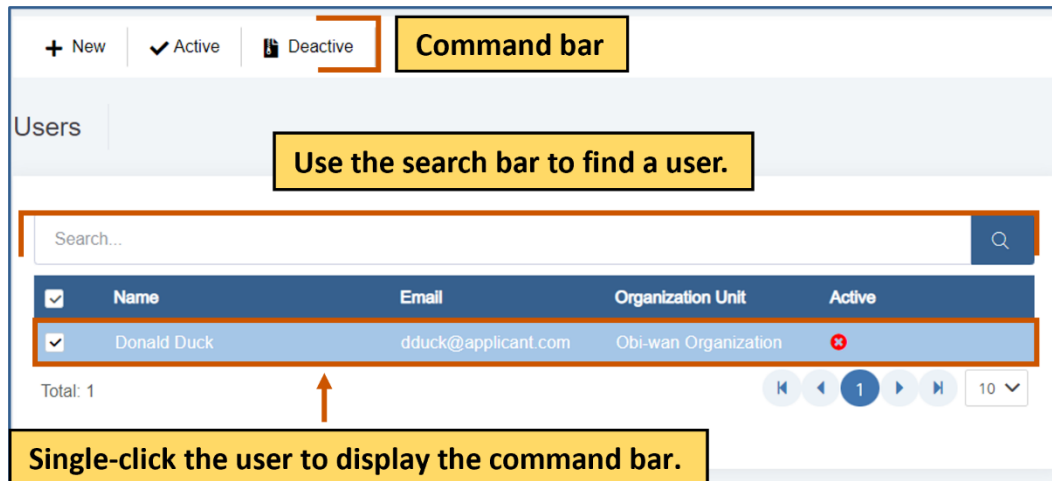


Figure 78: Display User Commands

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.

The screenshot shows the 'Create New User' dialog box with the 'Address' tab selected. The form contains the following fields: 'Address Line 1', 'Address Line 2', 'City', 'County', 'State/Province/Region', 'Country' (with a dropdown menu showing '--Select Country--'), and 'Postal Code'. At the bottom right, there are 'Cancel' and 'Save' buttons. A yellow callout box points to the 'Save' button with the text 'Save the user'.

Saved Successfully.

Figure 79: Create New User – Address Tab

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.

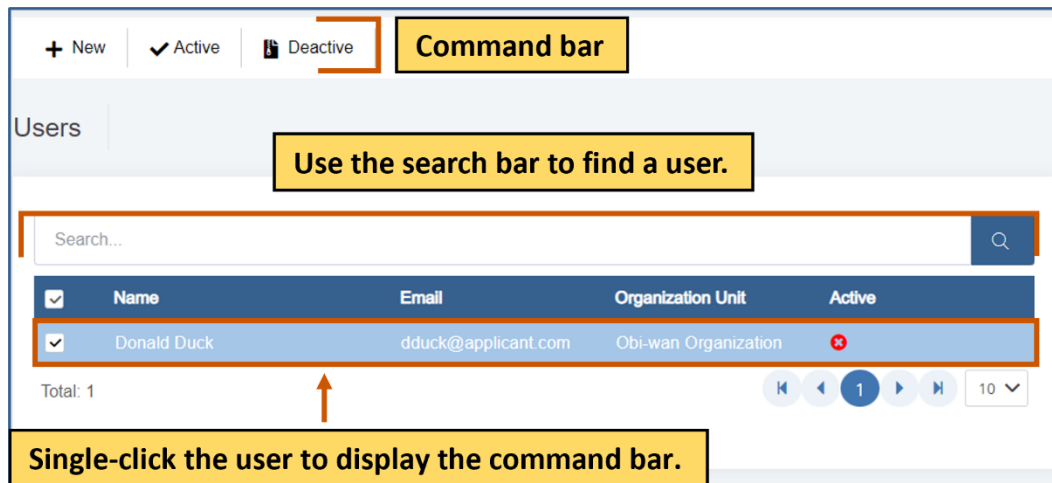


Figure 80: Display User Commands

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

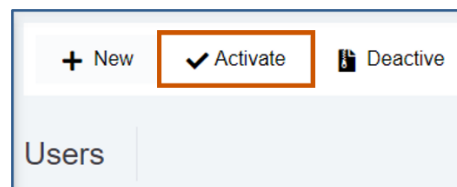


Figure 81: Activate User

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.

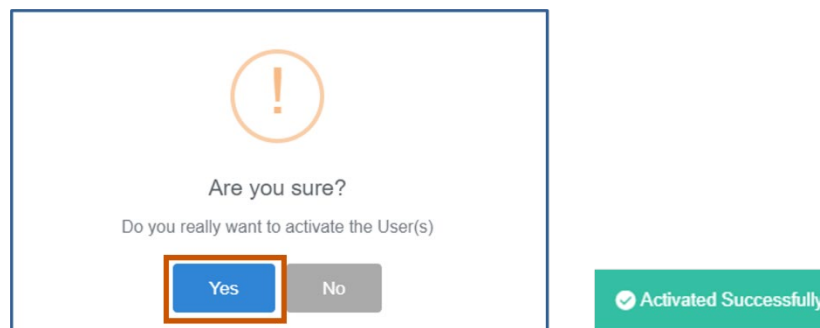


Figure 82: Warning to Activate User

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.

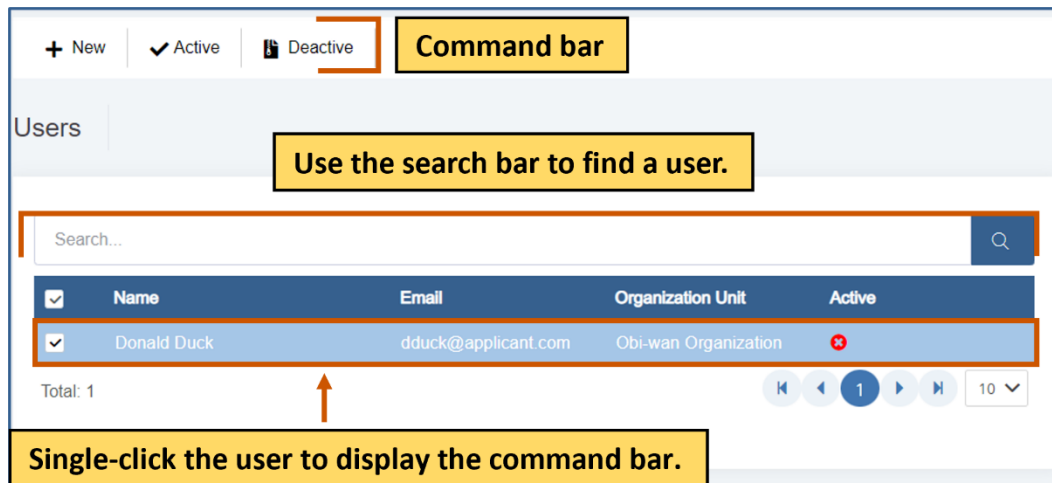


Figure 83: Display User Commands

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

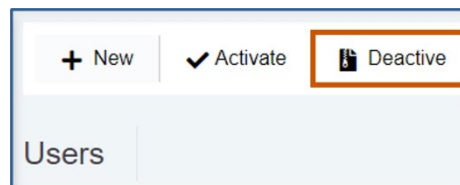


Figure 84: Deactivate User

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.

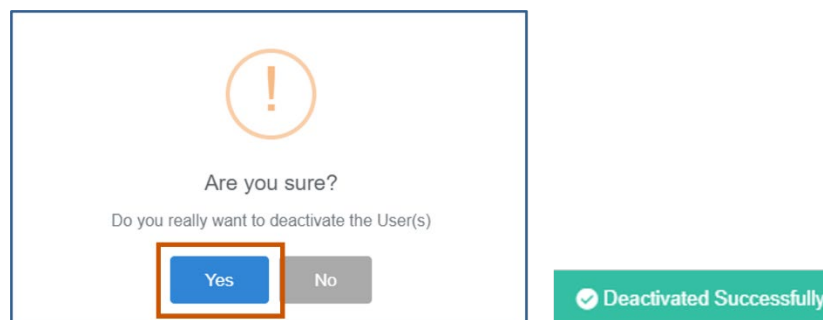


Figure 85: Warning to Activate User

Contacts

View the contacts related to the application.

The screenshot shows the 'Contacts' screen with a '+ New' button at the top left. Below it is a table with the following columns: Full Name, Organization Name, Job Title, Phone Number, and Email. The table contains two rows of data:

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

Below the table, there is a 'Total: 2' label. To the right of the table is a pagination control with arrows and a dropdown menu showing '10'. Three yellow callout boxes provide instructions: 'Total number of contacts' points to the 'Total: 2' label; 'Use the arrows to see more contacts.' points to the pagination arrows; and 'Use the drop-down list to choose how many contacts you see in the grid at a time.' points to the dropdown menu.

Figure 86: Contacts Screen

Add a Contact

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

The screenshot shows the 'Applicant' site map. The menu items are: Funding Announcement, My Submitted Application, My Applicant Profile, Users, and Contacts. The 'Contacts' item is highlighted with a blue background and a red border.

Figure 87: Site Map - Contacts

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

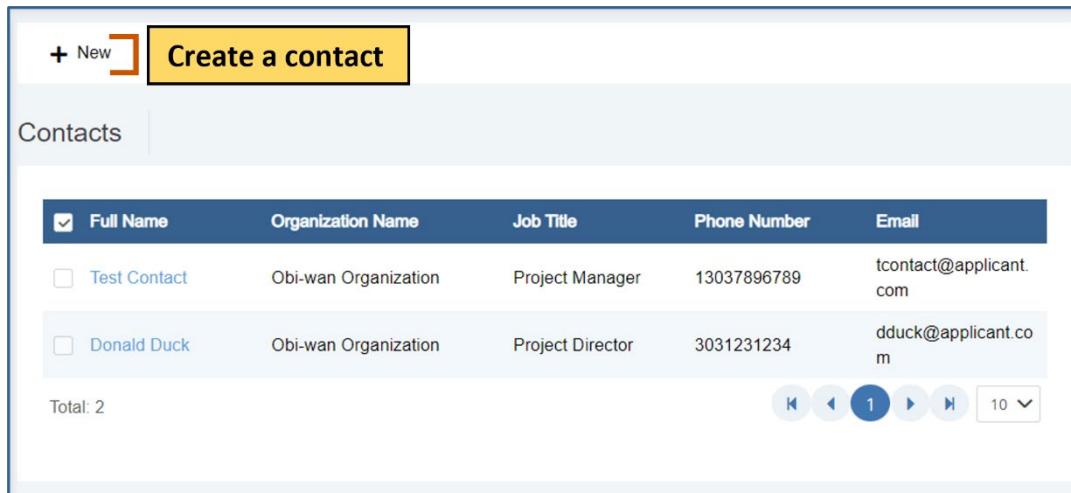


Figure 88: New Contact

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

Note: The red asterisks indicate required fields.

The screenshot shows a 'Create new contact' form with two tabs: 'Contact Details' (selected) and 'Address'. The 'Contact Details' tab contains several input fields, each with a red asterisk indicating it is required: First Name, Last Name, Job Title, Email, Phone Number, and Fax Number. There are 'Cancel' and 'Save' buttons at the bottom right of the form.

Figure 89: Create New Contact – Contact Details Tab

- Optional:** On the address tab, edit the the necessary fields.
Note: The red asterisks indicate required fields.
- 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.

The screenshot shows a 'Create new contact' dialog box with two tabs: 'Contact Details' and 'Address'. The 'Address' tab is active. It contains the following fields:

- Address Line 1 (text input)
- Address Line 2 (text input)
- City (text input)
- County (text input)
- State/Province/Region (text input)
- Country (dropdown menu)
- Postal Code (text input)

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red border. A yellow callout box with the text 'Save the contact to the grid.' and a downward arrow points to the 'Save' button. Below the form, a blue notification bar with a white information icon and the text 'Saved Successfully.' is visible.

Figure 90: Create New Contact – Address Tab

Edit a Contact

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

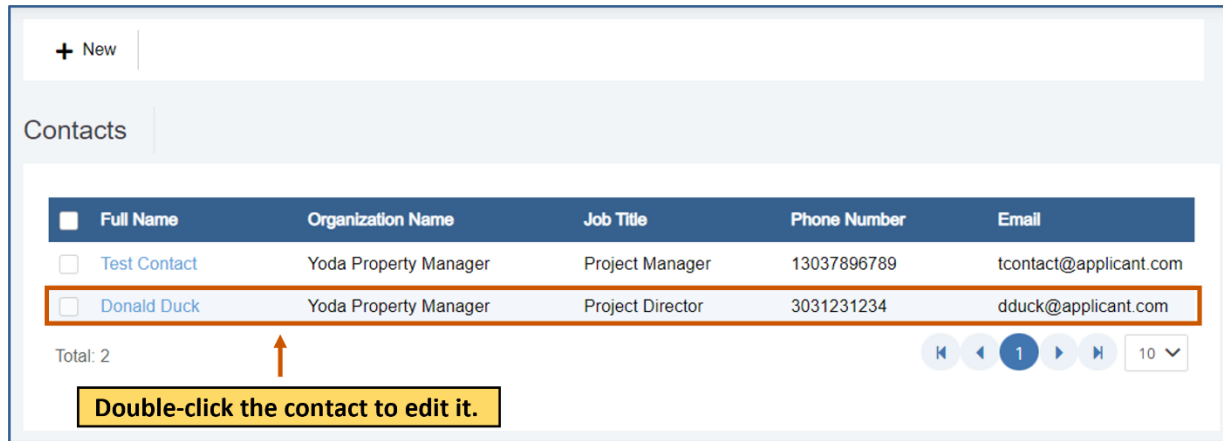


Figure 91: Edit Contact

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

Note: The red asterisks indicate required fields.

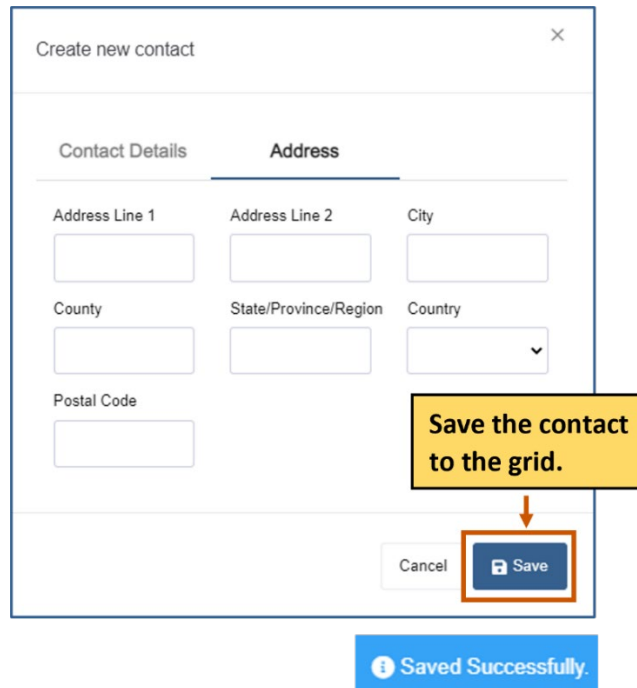


Figure 92: Create New Contact – Address Tab

Delete a Contact

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

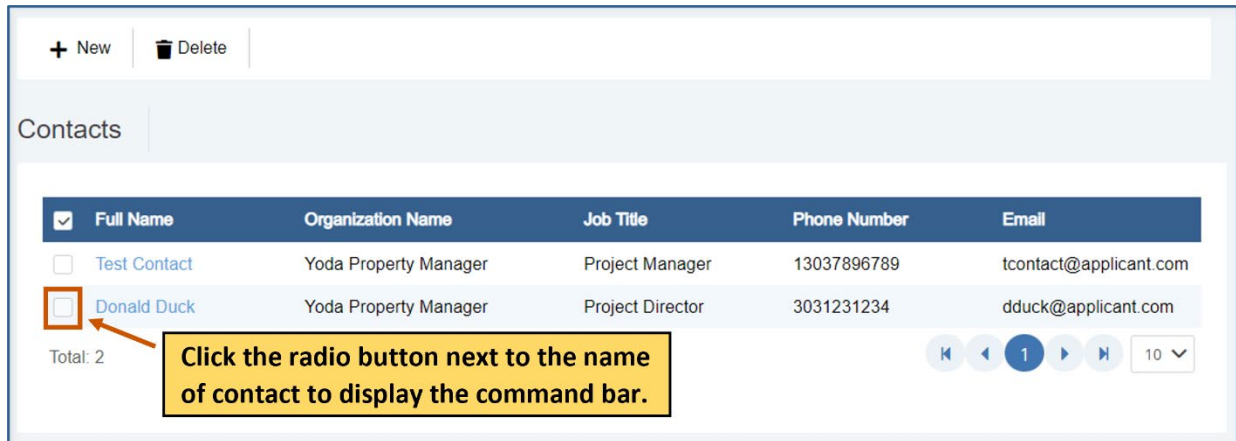


Figure 93: Click Contact

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

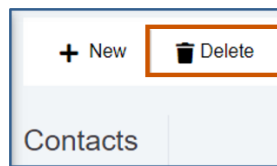


Figure 94: Delete Contact

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.

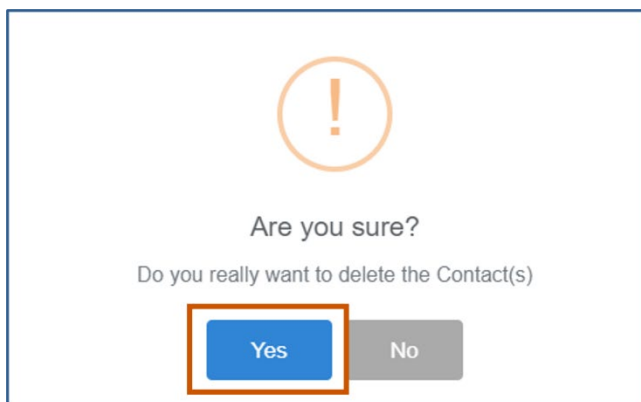


Figure 95: Warning to Delete Contact

Documents

View documents related to the application.

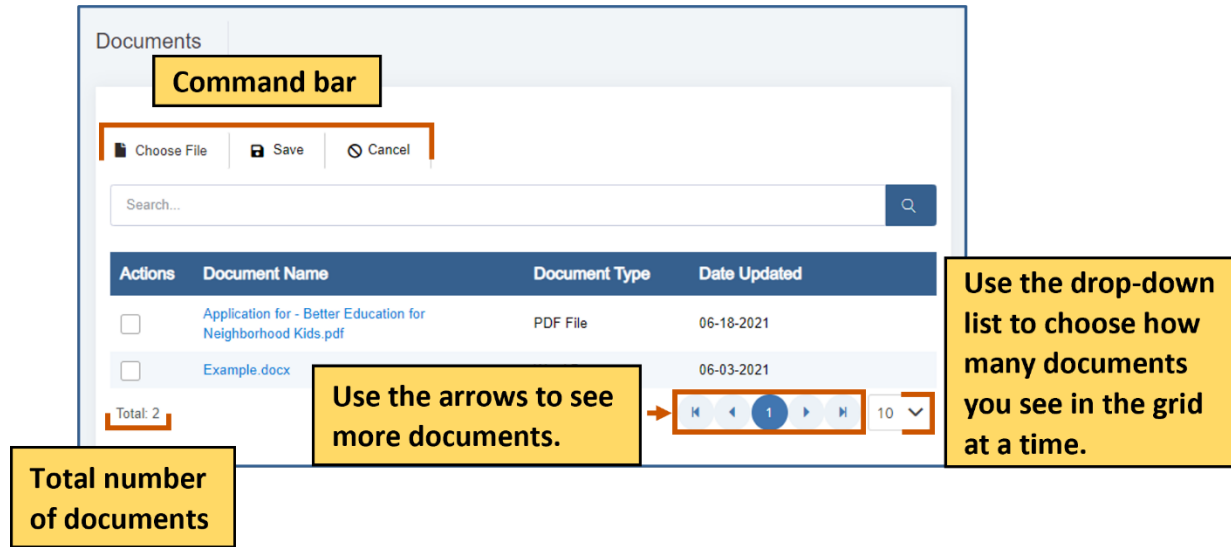


Figure 96: Documents Screen





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.

Table 3: Document Command Options

Add a Document

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

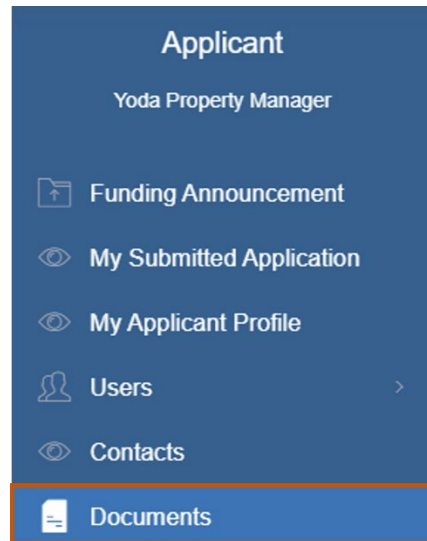




Figure 97: Site Map - Documents

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

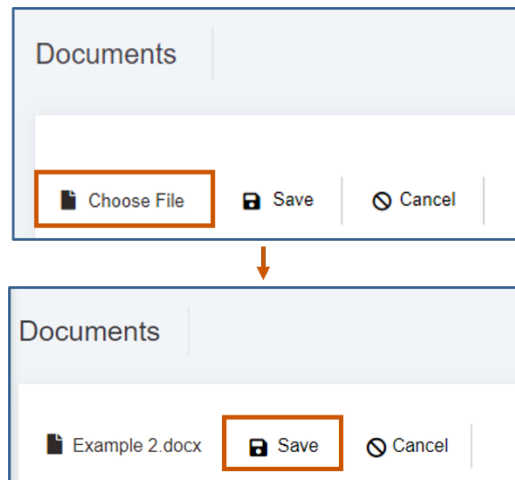


Figure 98: Add Document

Delete a Document

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

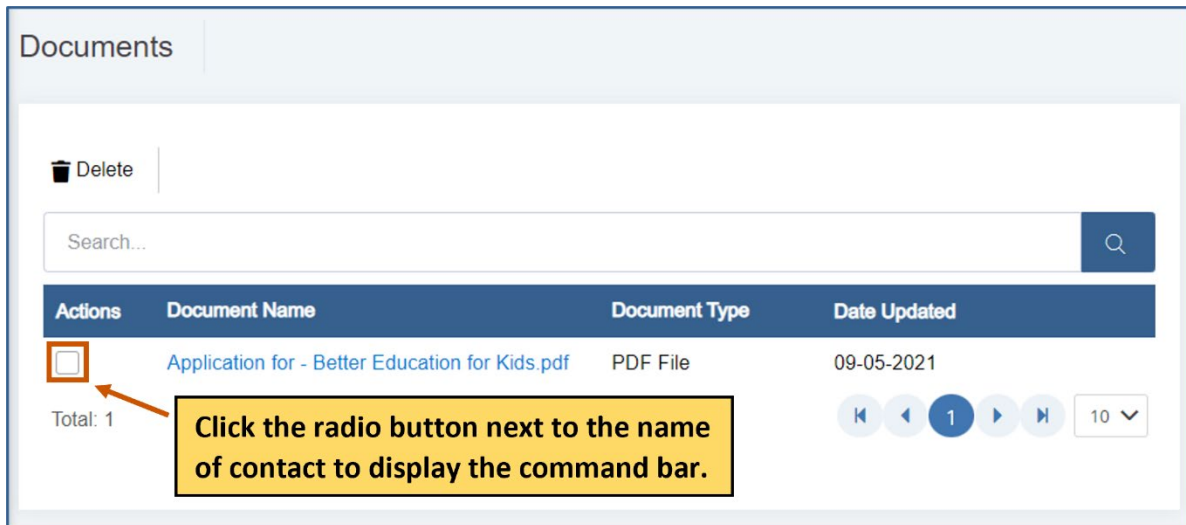


Figure 99: Click Document

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

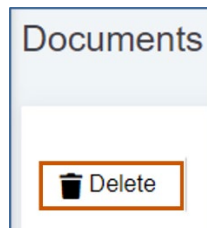


Figure 100: Delete Document

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.

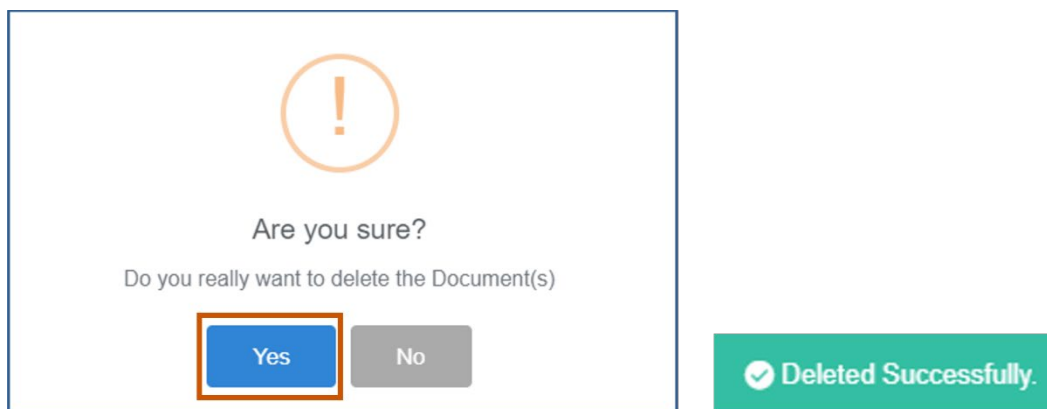


Figure 101: Warning to Delete Document

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.

The screenshot shows the 'Update Objective' interface with several callouts:

- Command bar:** Located at the top right, containing 'Close' and 'Minimize' buttons.
- Use the arrow to expand the list:** Points to a dropdown arrow next to the 'Goal' section.
- Add a goal:** Points to the '+ Add Goal' button.
- Use the arrow to expand the list:** Points to a dropdown arrow next to the 'Objectives (1)' section.
- Edit or delete the objective:** Points to edit and delete icons in the 'Objectives' table.

The interface includes the following sections and data:

Goal Section:

Goal Name	Goal Description	Start Date	End Date
Existing Objective			

Objectives (1) Table:

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
1	2491	HTS_TST & HTS_POS	HTS_TST & HTS_POS	Falguni Patel	10/01/2020	10/31/2020	[Edit] [Delete]

Performance Measure (4) Table:

Ref. Id	Performance Measure	Manager	Type	Planned	Actual	Active	
1417_1	Describe the sources for the data that you are reporting	Falguni Patel	Narrative			Not Started	[Edit] [Delete]

Grant Activities (2) Table:

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	Falguni Patel	10/01/2020	10/13/2020	Not Started	[Edit] [Delete]
8.2	8.2: Conduct District Supportive Supervision	Falguni Patel	10/01/2020	10/14/2020	Not Started	[Edit] [Delete]

Figure 102: Goals and Objectives

Use the arrow to expand the list of performance measures.

Update Objective

Close Minimize

Save Objective Objective Instructions

Goal + Add Goal

Goal Name	Goal Description	Start Date	End Date
Existing Objective			

Objectives (1)

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date
1	2491	HTS_TST & HTS_POS	HTS_TST & HTS_POS	Falguni Patel	10/01/2020	10/31/2020

Performance Measure (4) + Add Measure

Ref. Id	Performance Measure	Manager	Type	Planned	Actual	Active
1417_1	Describe the sources for the data that you are reporting	Falguni Patel	Narrative			Not Started

Grant Activities (2) + Add Activity

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	Falguni Patel	10/01/2020	10/13/2020	Not Started
8.2	8.2: Conduct District Supportive Supervision	Falguni Patel	10/01/2020	10/14/2020	Not Started

Add a performance measure.

Edit or delete the performance measure.

Figure 103: Performance Measures

Update Objective

Close Minimize

Save Objective Objective Instructions

Goal + Add Goal

Goal Name	Goal Description	Start Date	End Date
Existing Objective			

Objectives (1)

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date
1	2491	HTS_TST & HTS_POS	HTS_TST & HTS_POS	Falguni Patel	10/01/2020	10/31/2020

Performance Measure (4) + Add Measure

Ref. Id	Performance Measure	Manager	Type	Planned	Actual	Active
1417_1	Describe the sources for the data that you are reporting	Falguni Patel	Narrative			Not Started

Grant Activities (2) + Add Activity

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	Falguni Patel	10/01/2020	10/13/2020	Not Started
8.2	8.2: Conduct District Supportive Supervision	Falguni Patel	10/01/2020	10/14/2020	Not Started

Use the arrow to expand the list of grant activities.

Edit or delete grant activity.

Figure 104: Grant Activities

Add a Goal

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

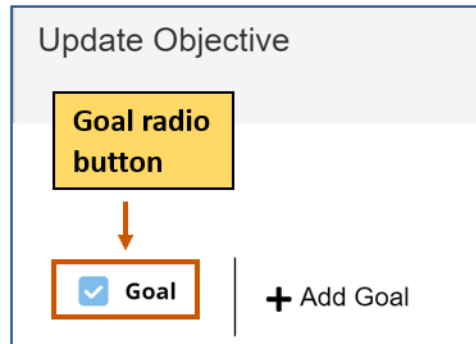


Figure 105: Goal Radio Button

1. Click **+ Add Goal**. The Goal dialog box appears.
2. 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.

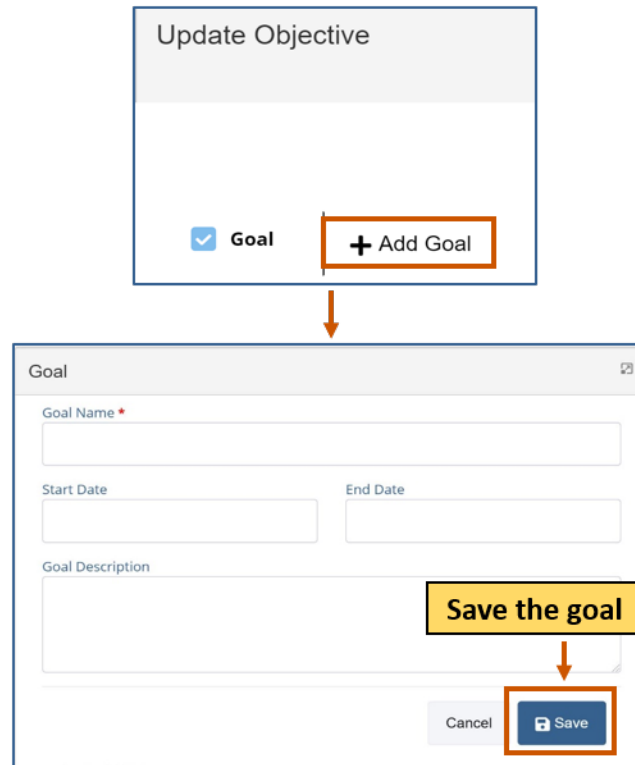


Figure 106: Add Goal

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.

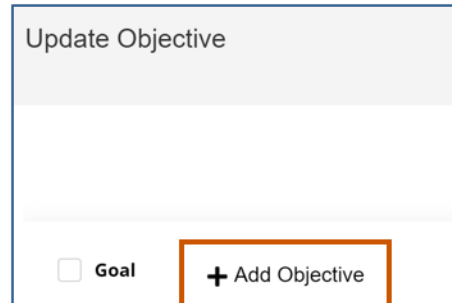


Figure 107: Add Objective

3. Fill in the necessary fields.
 - 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.

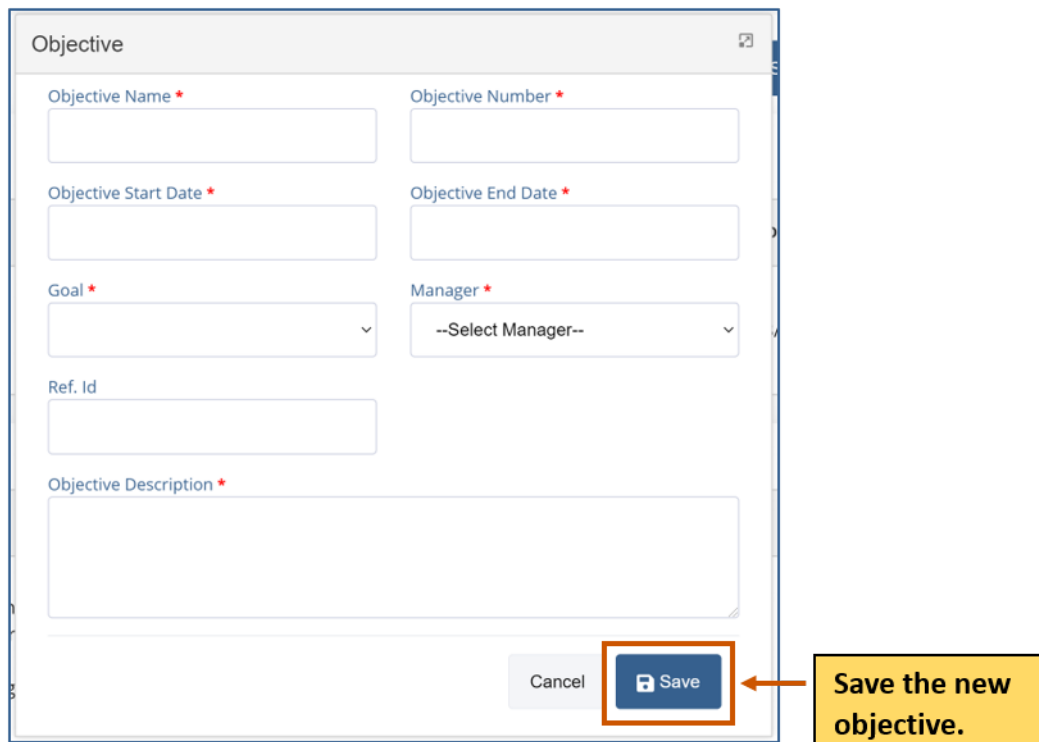


Figure 108: Objective Dialog Box

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.

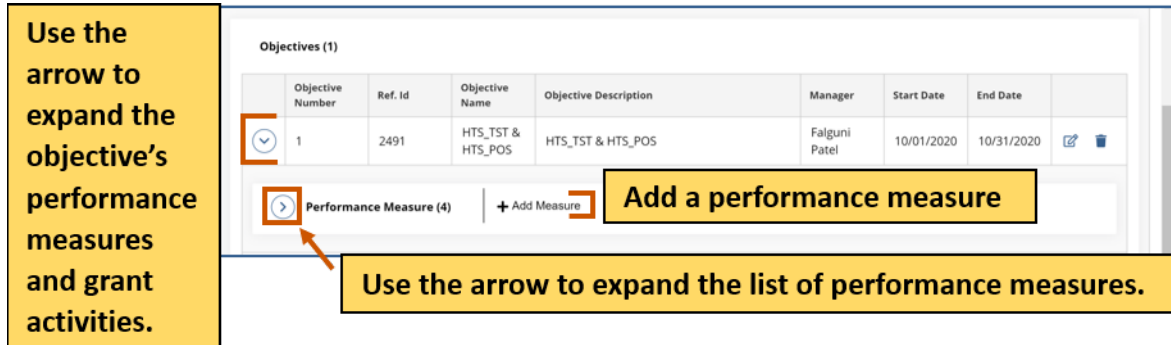


Figure 109: Add Measure

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

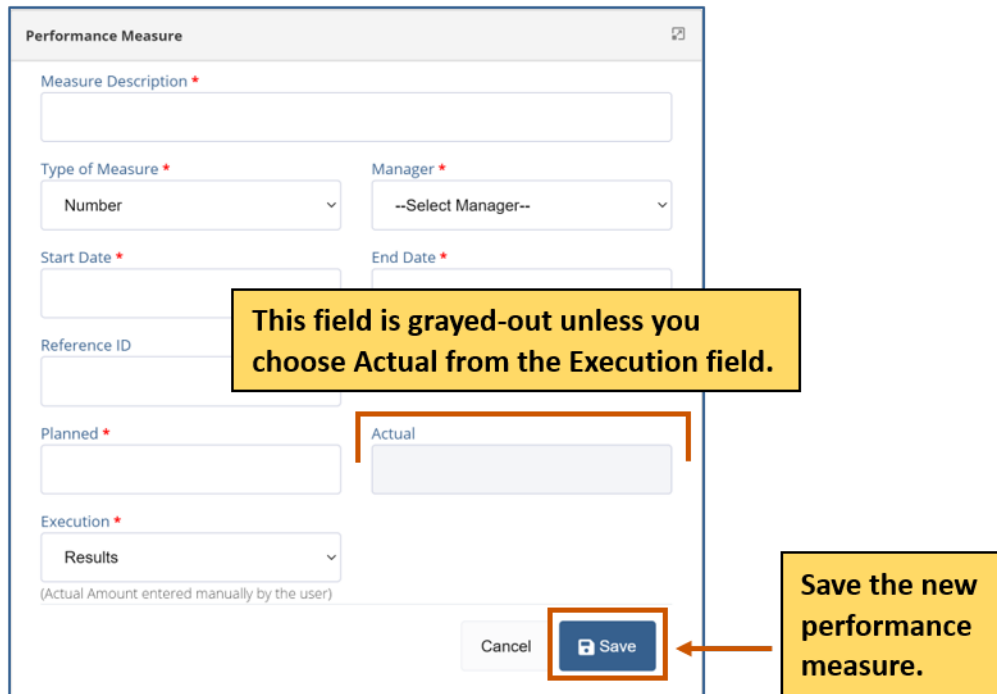


Figure 110: Performance Measure Dialog Box

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.

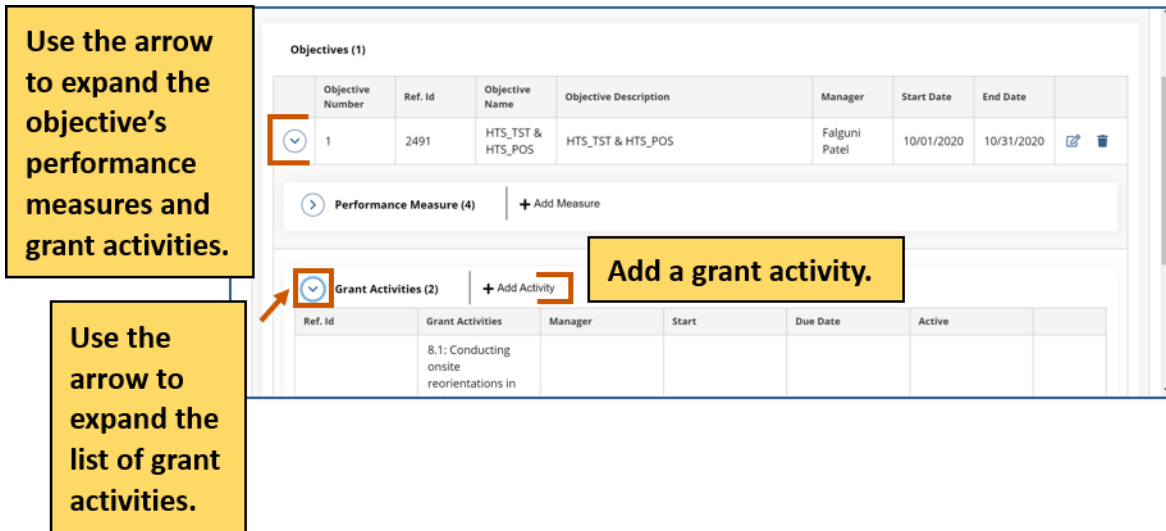


Figure 111: Add Activity

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 2-5 for each grant activity you wish to add.

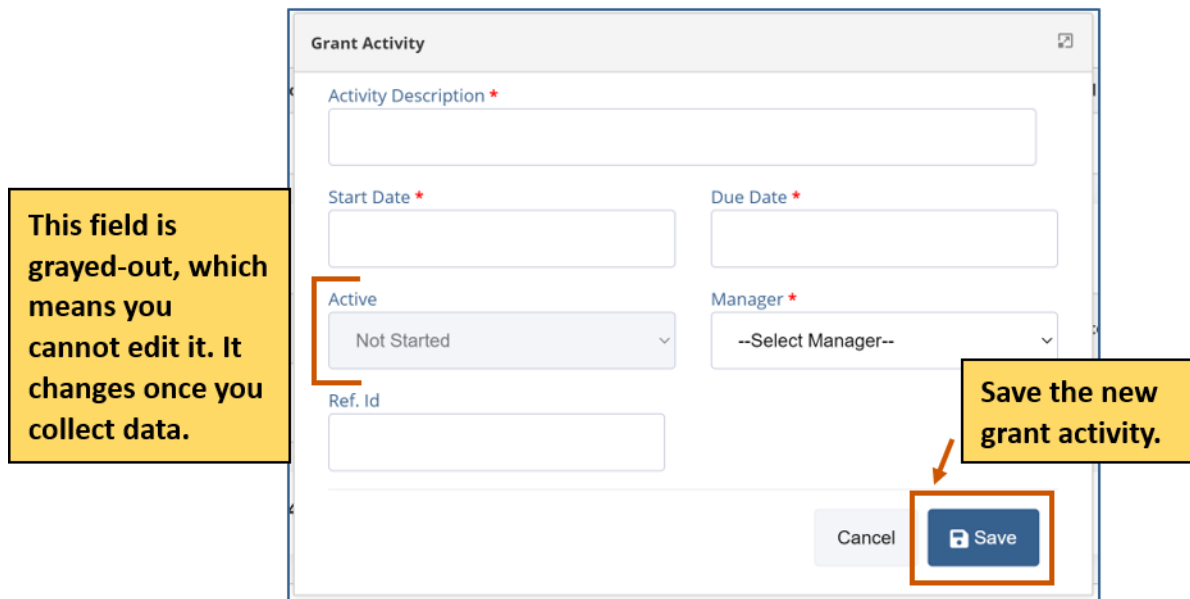





Figure 112: Grant Activity Dialog Box

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** . The Objective dialog box appears.


Goal
 + Add Objective


Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
4	General Population	Engage Local Stakeholders	Engaging with local stakeholders to remove all barriers to access for persons seeking recovery from opioid and stimulant use disorders	To Be Determined	01/28/2020	12/30/2021	 

Use the arrow to expand the objective’s performance measures and grant activities.

Edit the objective.

Figure 113: Edit Objective

5. Edit the necessary fields.
 - 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


Objective Name *

Objective Number *

Objective Start Date *

Objective End Date *

Goal *

Manager *
--Select Manager--


Ref. Id

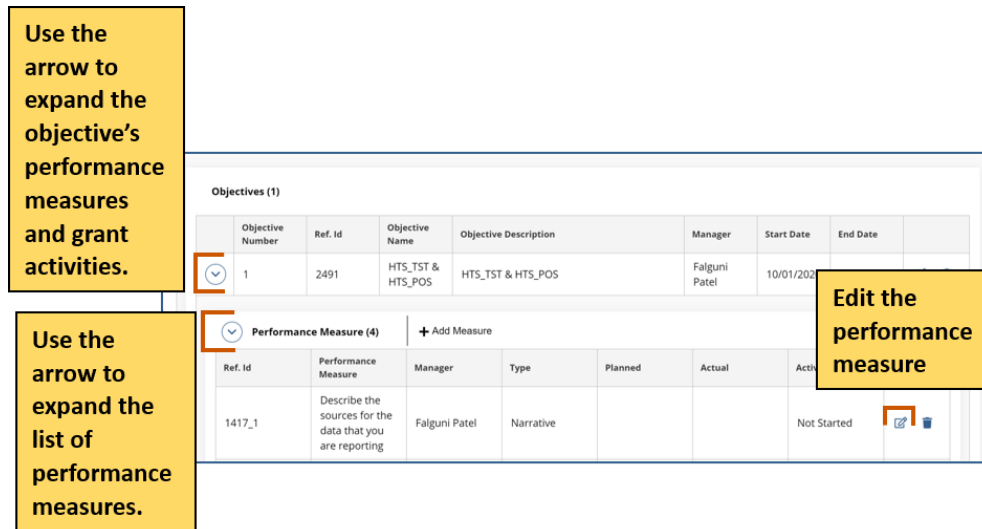
Objective Description *

Save the new objective.

Figure 114: Objective Dialog Box



Edit a Performance Measure

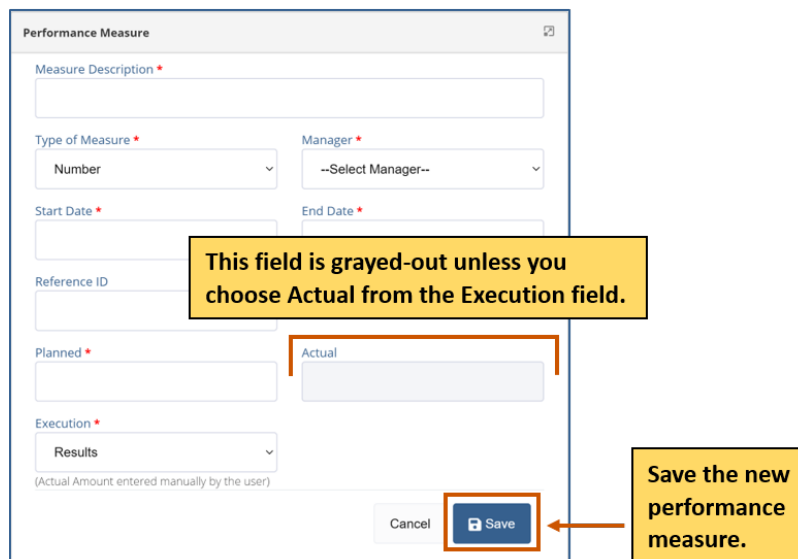
1. **Optional:** Use the arrow next to the goal to expand the goal’s objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the performance measure to expand the list.
4. Choose the performance measure you wish to modify.
5. Click **Edit** . The Performance Measure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



The screenshot shows a table titled 'Objectives (1)' with columns: Objective Number, Ref. Id, Objective Name, Objective Description, Manager, Start Date, and End Date. The first row has Objective Number 1, Ref. Id 2491, Objective Name HTS_TST & HTS_POS, Objective Description HTS_TST & HTS_POS, Manager Falguni Patel, and Start Date 10/01/2023. Below this is a section for 'Performance Measure (4)' with a '+ Add Measure' button and a table with columns: Ref. Id, Performance Measure, Manager, Type, Planned, Actual, and Action. The first row in this table has Ref. Id 1417_1, Performance Measure 'Describe the sources for the data that you are reporting', Manager Falguni Patel, Type Narrative, and Action 'Not Started'. There are callout boxes: one pointing to the arrow next to the objective, one pointing to the arrow next to the performance measure, and one pointing to the edit icon in the action column.

Figure 115: Edit Performance Measure


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.

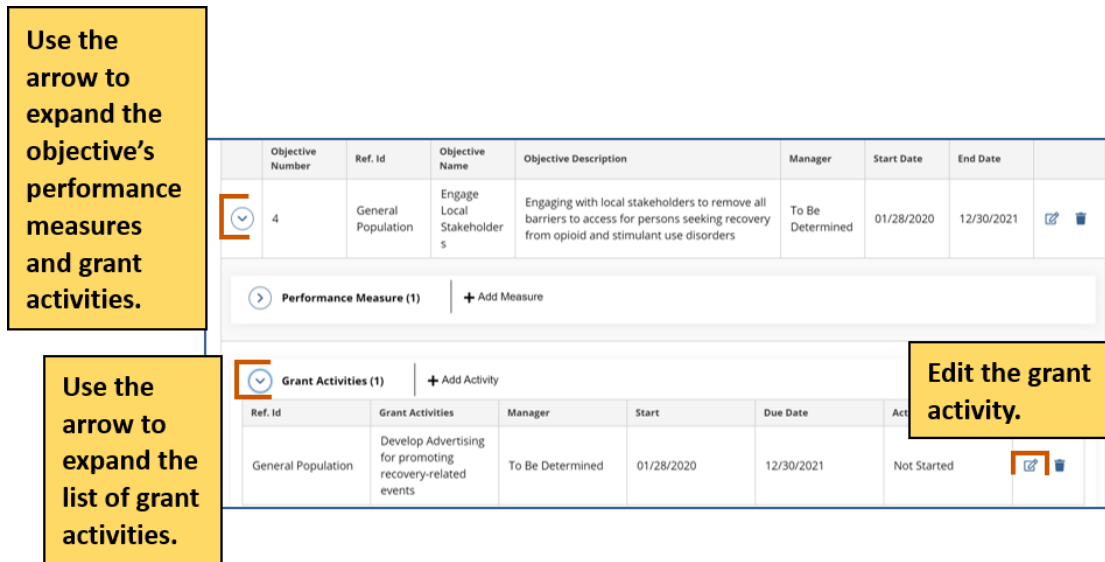


The screenshot shows the 'Performance Measure' dialog box with the following fields: Measure Description (required), Type of Measure (Number), Manager (--Select Manager--), Start Date (required), End Date (required), Reference ID, Planned (required), Actual (grayed out), Execution (Results), and a 'Save' button. Callout boxes: one pointing to the 'Actual' field with the text 'This field is grayed-out unless you choose Actual from the Execution field.', and another pointing to the 'Save' button with the text 'Save the new performance measure.'



Figure 116: Performance Measure Dialog Box

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** . The Grant Activity dialog box appears.





Use the arrow to expand the objective’s performance measures and grant activities.

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
4	General Population	Engage Local Stakeholders	Engaging with local stakeholders to remove all barriers to access for persons seeking recovery from opioid and stimulant use disorders	To Be Determined	01/28/2020	12/30/2021	 

Performance Measure (1) | + Add Measure



Grant Activities (1) | + Add Activity

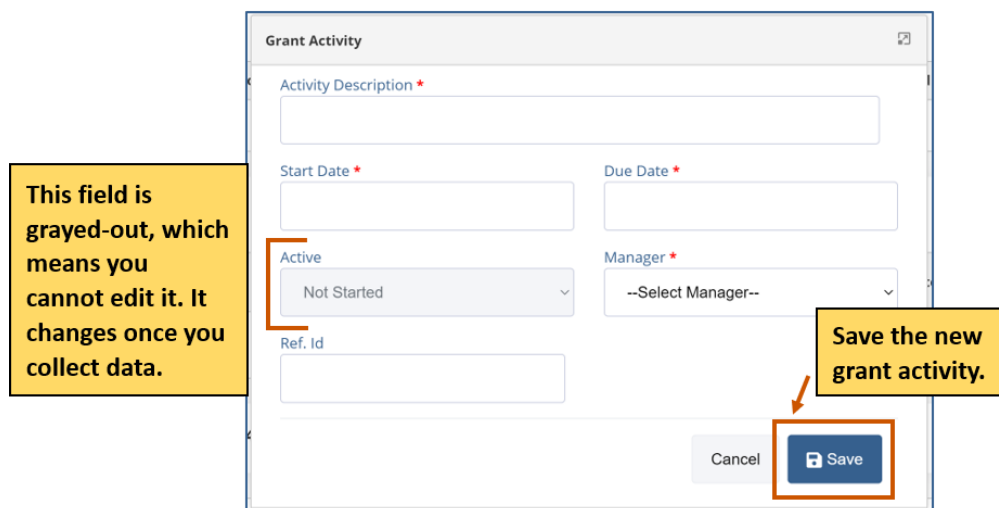
Ref. Id	Grant Activities	Manager	Start	Due Date	Act	
General Population	Develop Advertising for promoting recovery-related events	To Be Determined	01/28/2020	12/30/2021	Not Started	 

Use the arrow to expand the list of grant activities.

Edit the grant activity.

Figure 117: Edit Grant Activity

6. Edit the necessary fields.
 -  **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: Not Started (grayed-out) Manager * --Select Manager--

Ref. Id


Cancel **Save**

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

Save the new grant activity.



Figure 118: Grant Activity Dialog Box

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.

Use the arrow to expand the objective’s performance measures and grant activities.


Goal | [+ Add Objective](#)

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
4	General Population	Engage Local Stakeholders	Engaging with local stakeholders to remove all barriers to access for persons seeking recovery from opioid and stimulant use disorders	To Be Determined	01/28/2020	12/30/2021	 

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.



Are you sure?


Do you really want to delete the Objective(s)

Yes

No



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 and grant activities.

Objectives (1)

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
1	2491	HTS_TST & HTS_POS	HTS_TST & HTS_POS	Falguni Patel	10/01/2020	10/31/2020	 

Use the arrow to expand the list of performance measures.


Performance Measure (4) + Add Measure

Ref. Id	Performance Measure	Manager	Type				
1417_1	Describe the sources for the data that you are reporting	Falguni Patel	Narrative			Not Started	 

Delete the performance measure

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.



Are you sure?


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

Yes



No

Figure 122: Warning to Delete Performance Measure

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.

Use the arrow to expand the objective’s performance measures and grant activities.

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
4	General Population	Engage Local Stakeholders	Engaging with local stakeholders to remove all barriers to access for persons seeking recovery from opioid and stimulant use disorders	To Be Determined	01/28/2020	12/30/2021	 

> Performance Measure (1) + Add Measure


> Grant Activities (1) + Add Activity

Ref. Id	Grant Activities	Manager	Start	Due Date	Acti	
General Population	Develop Advertising for promoting recovery-related events	To Be Determined	01/28/2020	12/30/2021	Not Started	 

Delete the grant activity

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.



Are you sure?

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

Yes

No

Figure 124: Warning to Delete Grant Activity

Budget Tools

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.

The screenshot shows the 'Budget Tools' interface. At the top, there is a 'Year' dropdown menu set to 'Year 1', a 'Save Budget' button, and a 'Budget Instructions' button. Below this is a table with columns for 'Budget Categories', 'Direct', 'Cash Match', 'In-Kind Match', 'Total', and 'Leveraged'. The table lists categories like 'BN Fringe', 'Supplies', 'Widgets', 'Laser Mouse', 'Widgets - other', and 'Supplies - other'. A callout box points to the 'Year' dropdown with the text: 'Use the drop-down list to choose a budget year.' Another callout points to the 'Budget Instructions' button: 'View the Budget Instructions for specific guidelines to prepare your budget for submission.' A third callout points to the white cells in the table: 'Type in amount in cells that are white.' A fourth callout points to a 'BN' symbol next to 'Widgets - other' in the category list: 'Single-click the green BN symbol next to a category to display budget calculations and the budget narrative.' A fifth callout points to the 'Budget tools' icon in the table: 'Budget tools'.

Figure 125: Budget Tools

The screenshot shows the 'View Budget Calculations' interface. It has three main sections: 'Budget Justification', 'Budget Calculations', and 'Budget Narrative'. Under 'Budget Justification', there is a 'Personnel' section with a 'Project Director' entry. A callout box points to the 'Project Director' text: 'Name of category.' Another callout points to the 'Budget Calculations' section: 'Budget calculations'. A third callout points to the 'Budget Narrative' section: 'Notes about the justification(s) for the change(s).'

Figure 126: View Budget Calculations

Add Budget Calculations and 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.

Budget Categories	Direct	Cash Match	In-Kind Match	Total	Leveraged
BN Fringe					
▼ Supplies	\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
▼ Widgets	\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
BN Laser Mouse					
BN Widgets - other					
BN Supplies - other					
Total	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

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

Figure 127: Add Budget Calculations and Narrative

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

Example dialog box

Budget Categories

Budget Category: [Dropdown]

Total Cost: \$ 0.00

Cash Match Funds: \$ 0.00


In-Kind Match Funds: \$ 0.00

Total Requested Amount: \$ 0.00

Budget Narrative: [Text Area]

Cancel Save

Figure 128: Budget Categories Dialog Box

- Click  **Save**. The budget calculations and 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 Calculations	Budget Narrative
<p>Fringe</p> <p>Displays the budget category</p>	<p>Displays the total amount of budget calculations</p> <p>Total Cost: \$0.00 Cash Match Funds: \$100.00 In-Kind Match Funds: \$1,000.00 Total Requested Amount: \$0.00</p>	<p>Example test.</p> <p>Displays the budget narrative about the specific budget category</p>

Figure 129: Save Budget Calculations and Narrative

Add a Parent Category

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

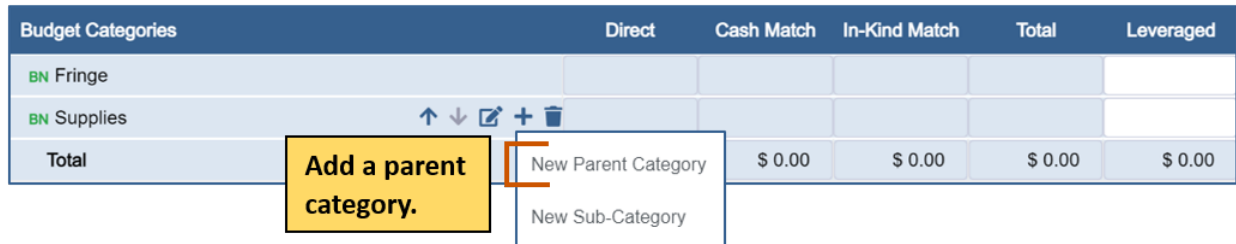



Figure 130: Add Parent Category

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

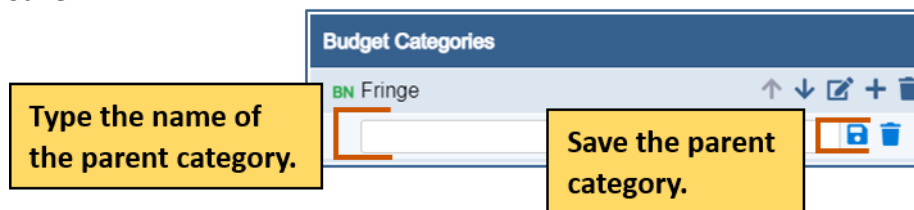



Figure 131: Save Parent Category

Edit a Parent Category

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

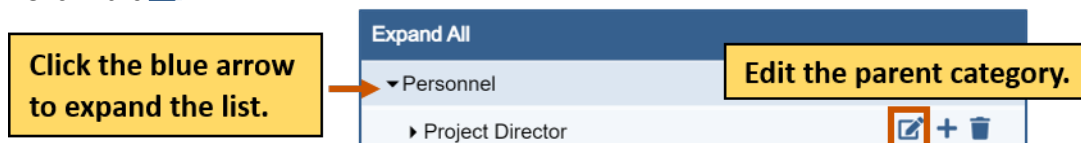



Figure 132: Edit Parent Category

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

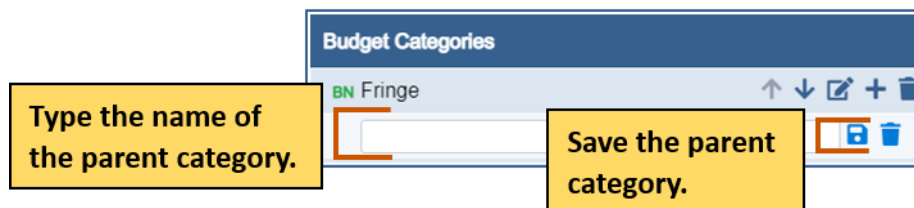


Figure 133: Save Parent Category

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 sub-category.



Figure 134: Delete Parent Category

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

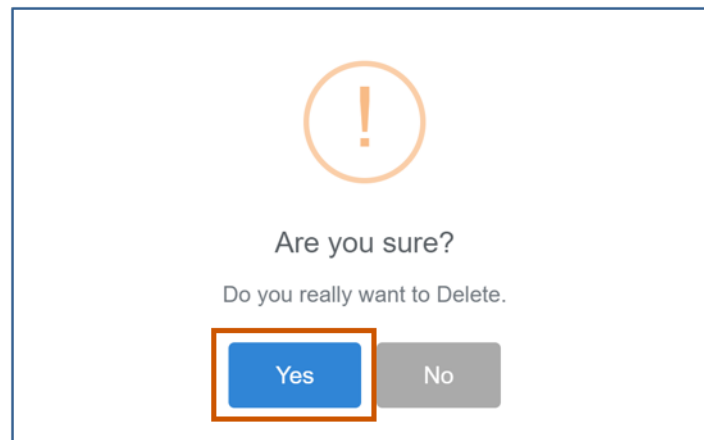


Figure 135: Warning to Delete Category

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**.

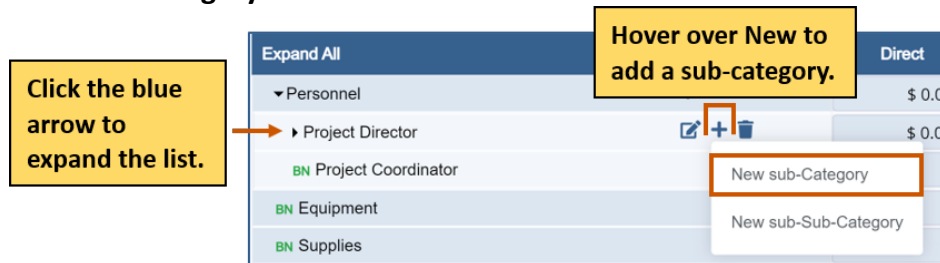



Figure 136: Add Sub-Category

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

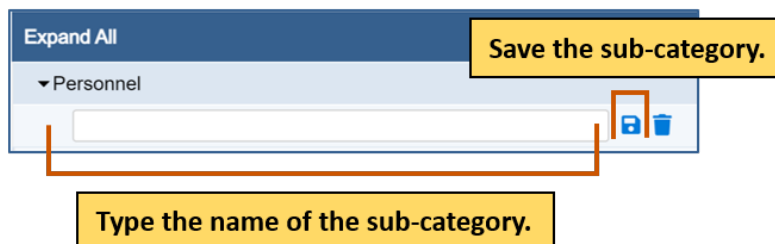



Figure 137: Save Sub-Category

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** .

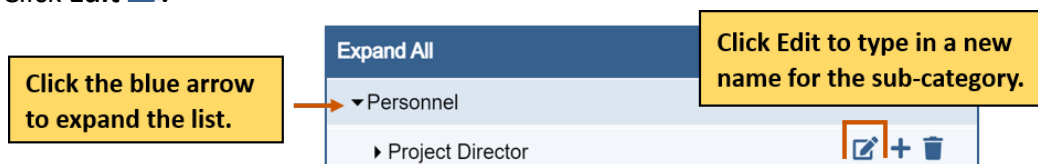



Figure 138: Edit Sub-Category

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

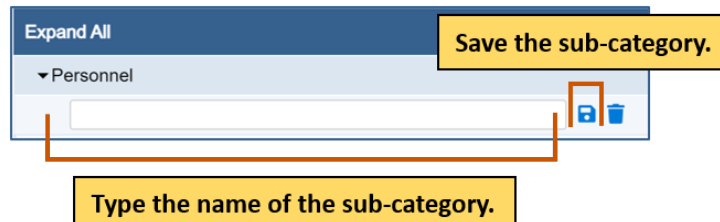


Figure 139: Save Sub-Category

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 sub-category.



Figure 140: Delete Sub-Category

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

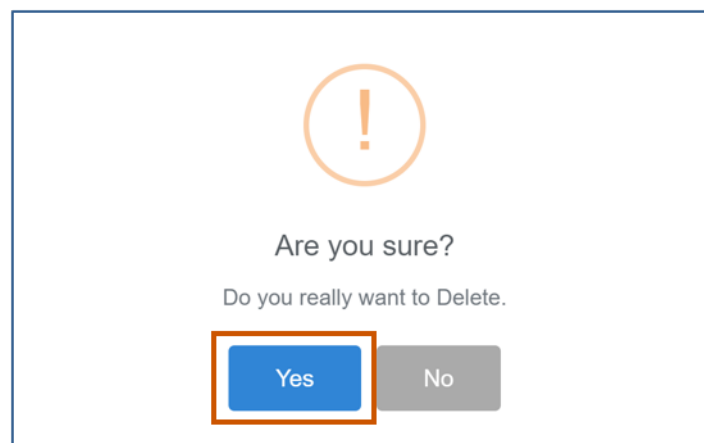


Figure 141: Warning to Delete Category

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.

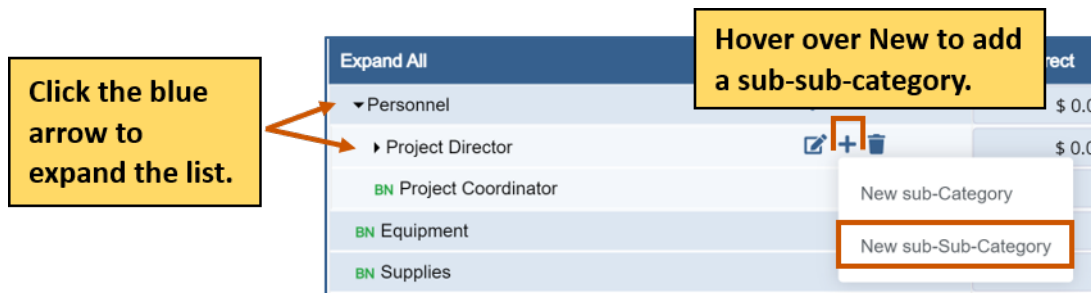



Figure 142: Add Sub-Sub-Category

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

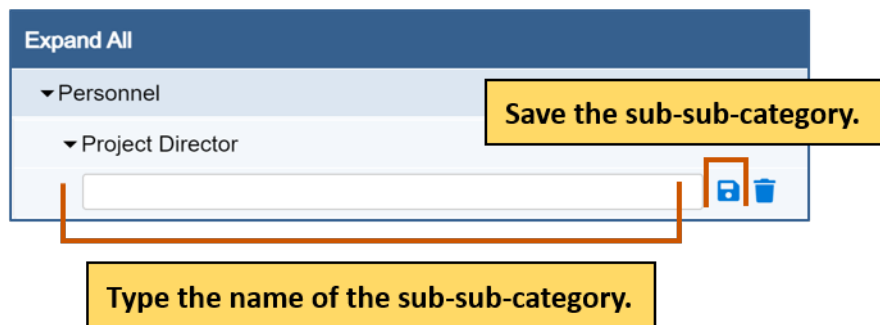



Figure 143: Save Sub-Sub-Category

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** .

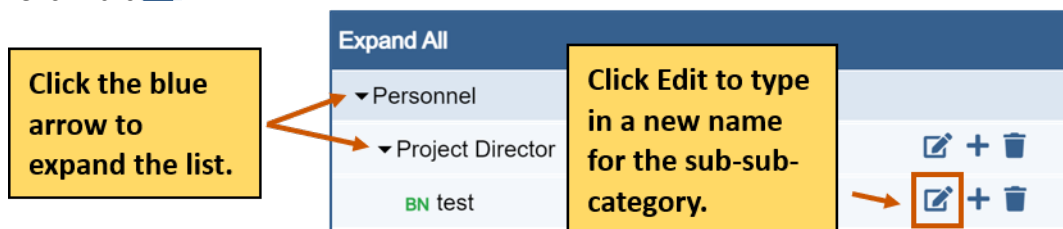



Figure 144: Edit Sub-Sub-Category

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

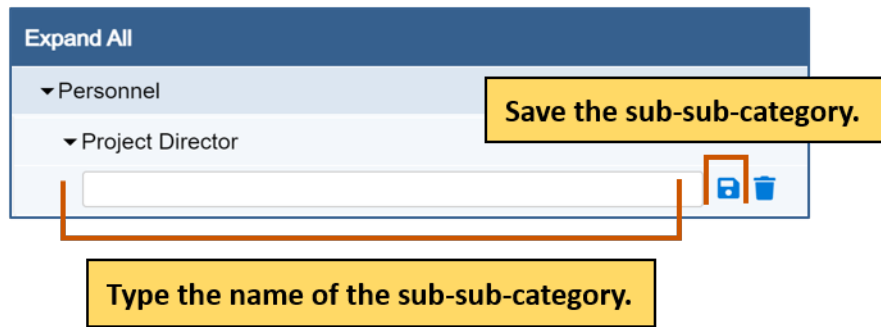



Figure 145: Save Sub-Sub-Category

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-sub-category.

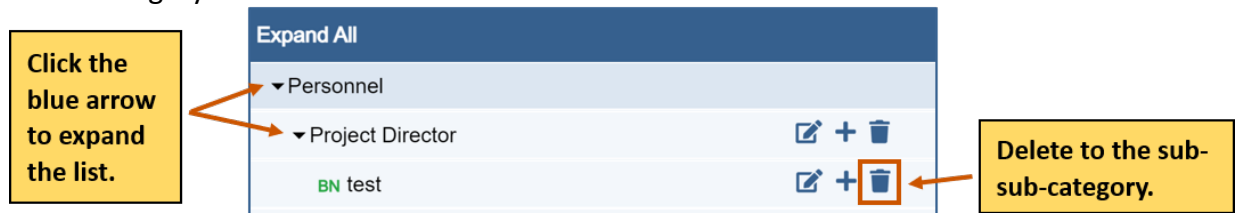


Figure 146: Delete Sub-Sub-Category

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

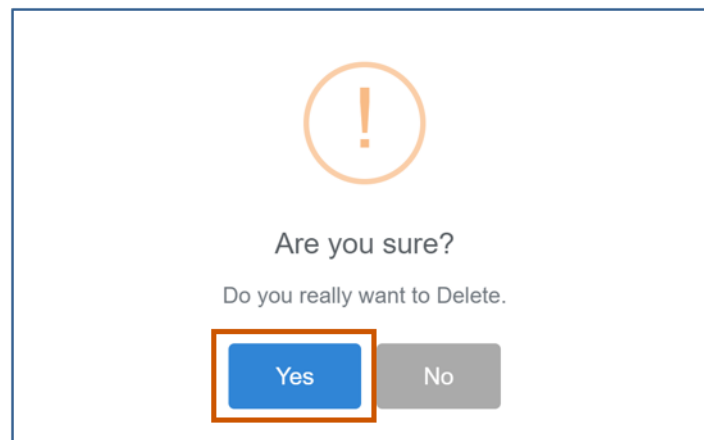


Figure 147: Warning to Delete Category

Move a Category Up or Down on the Grid

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