GrantVantage®

DMPED

OFFICE OF THE DEPUTY MAYOR FOR PLANNING & ECONOMIC DEVELOPMENT

# Applicant Instructions

# Table of Contents

# 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.

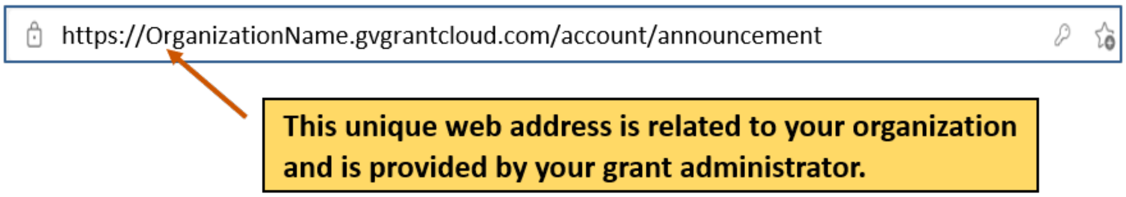



*Figure 1: GrantVantage URL*

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

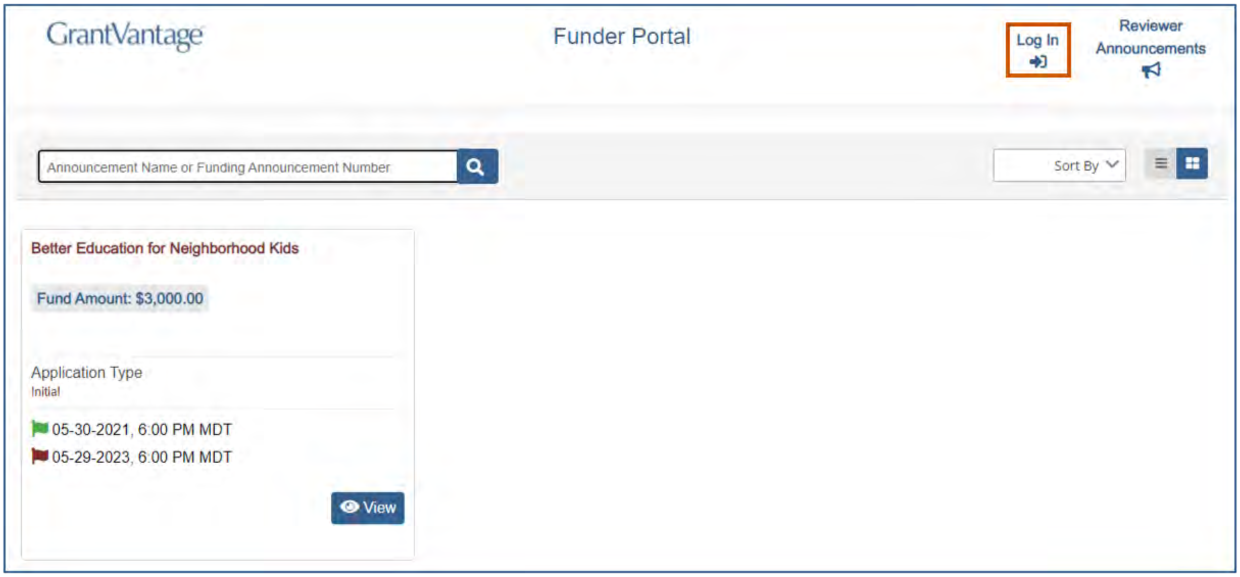



*Figure 2: Public Facing Page*

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

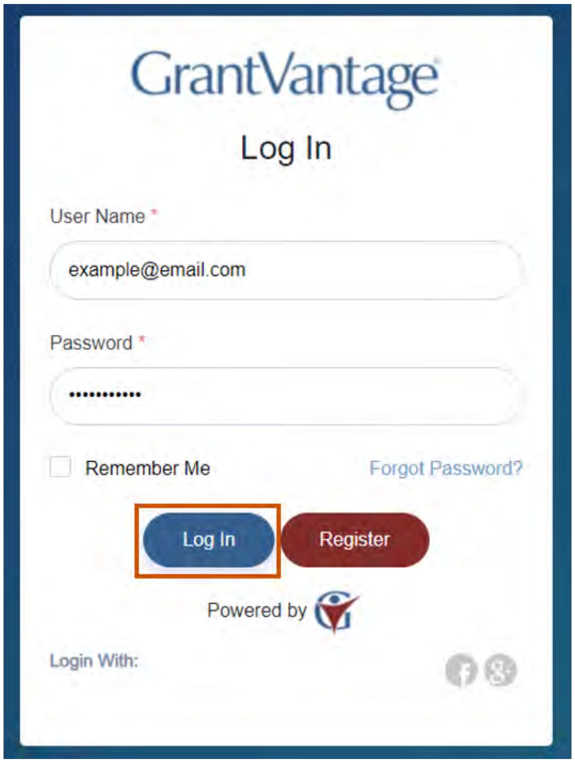



*Figure 3: Login Screen*

# 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.

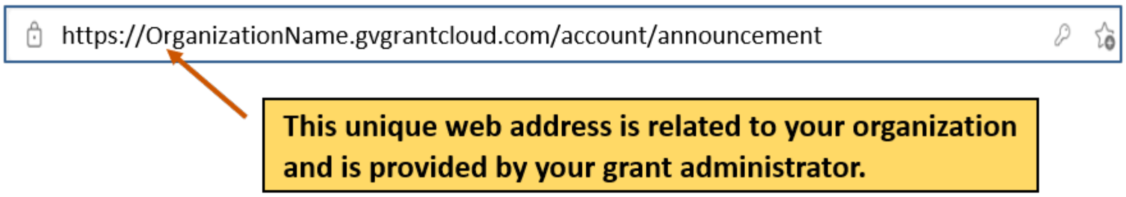



*Figure 4: GrantVantage URL*

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

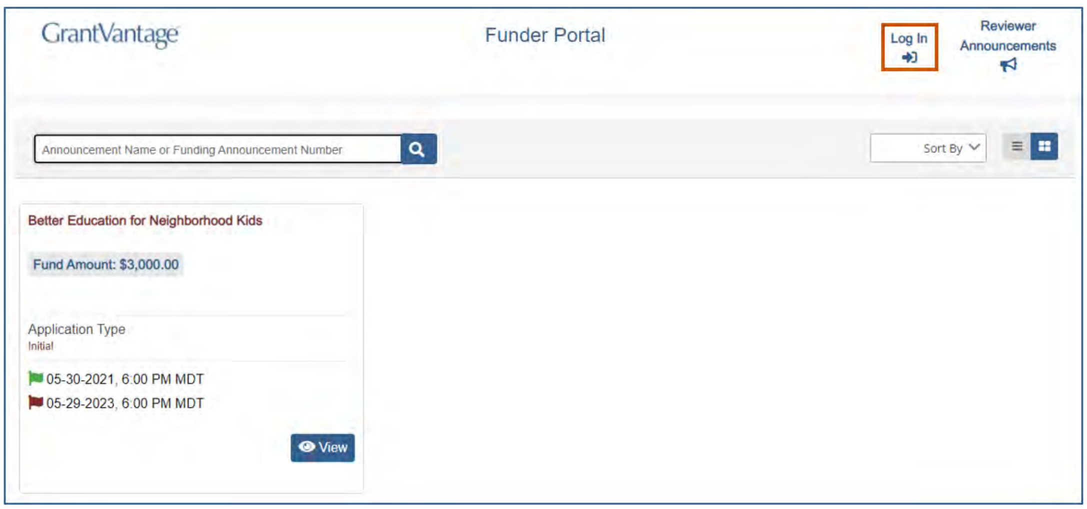



*Figure 5: Public Facing Page*

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

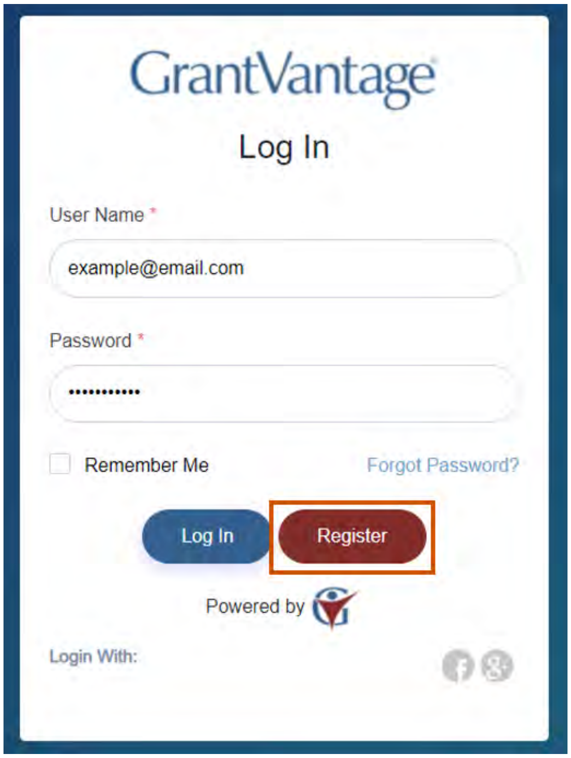



*Figure 6: Register Profile*

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.

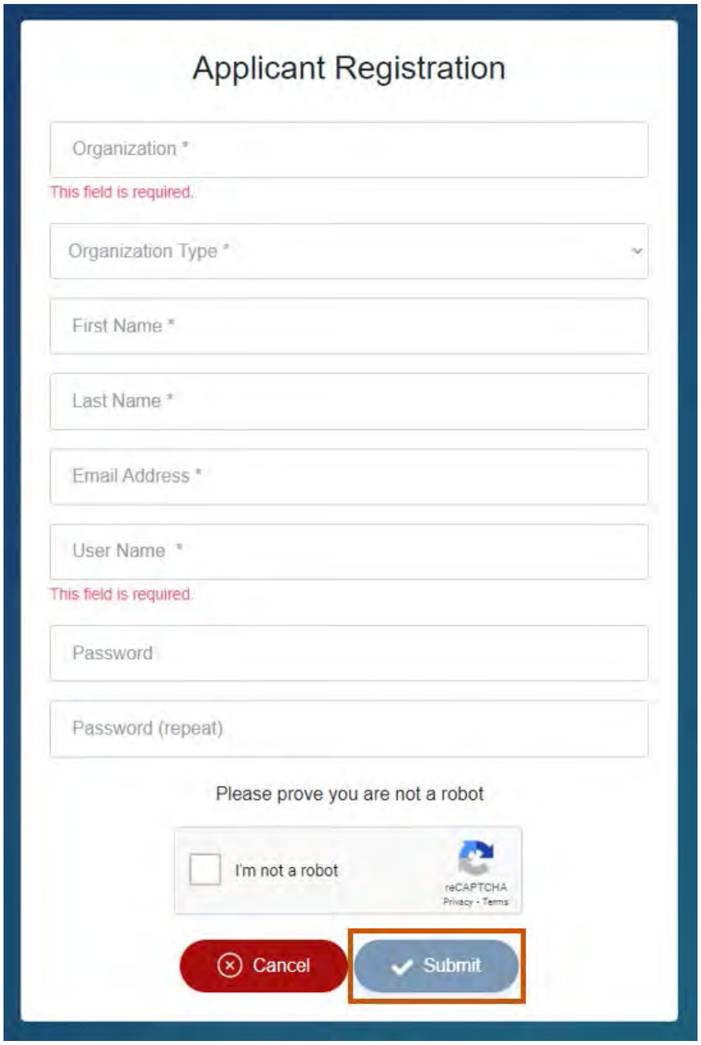



*Figure 7: Applicant Registration*

# 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.

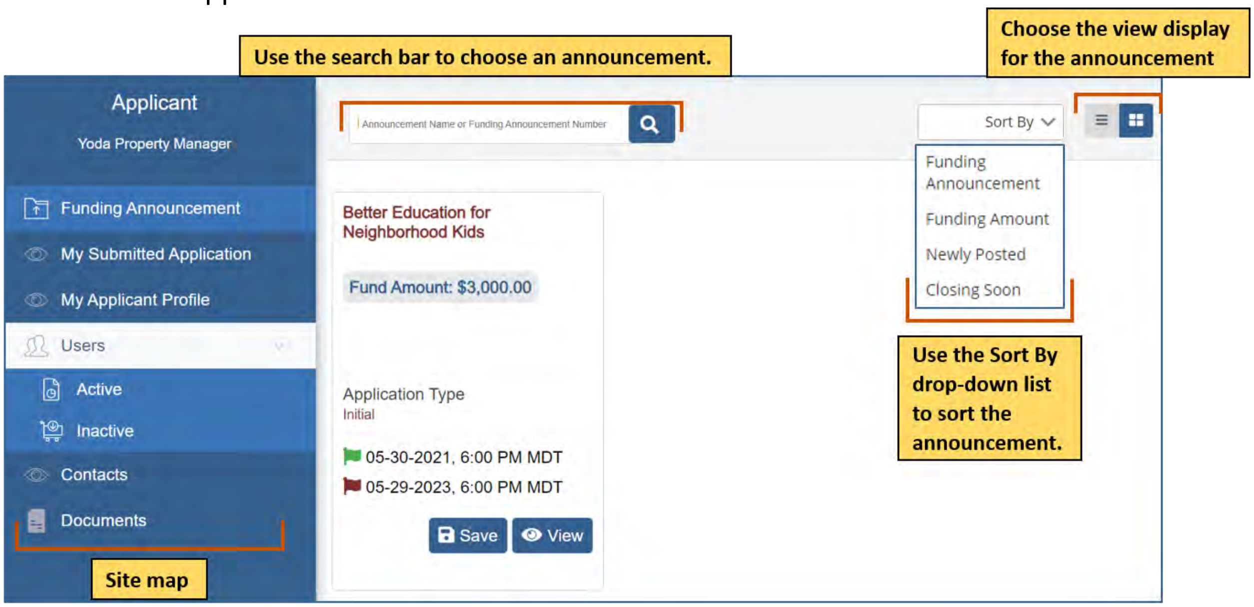



*Figure 8: Homepage Screen 1*

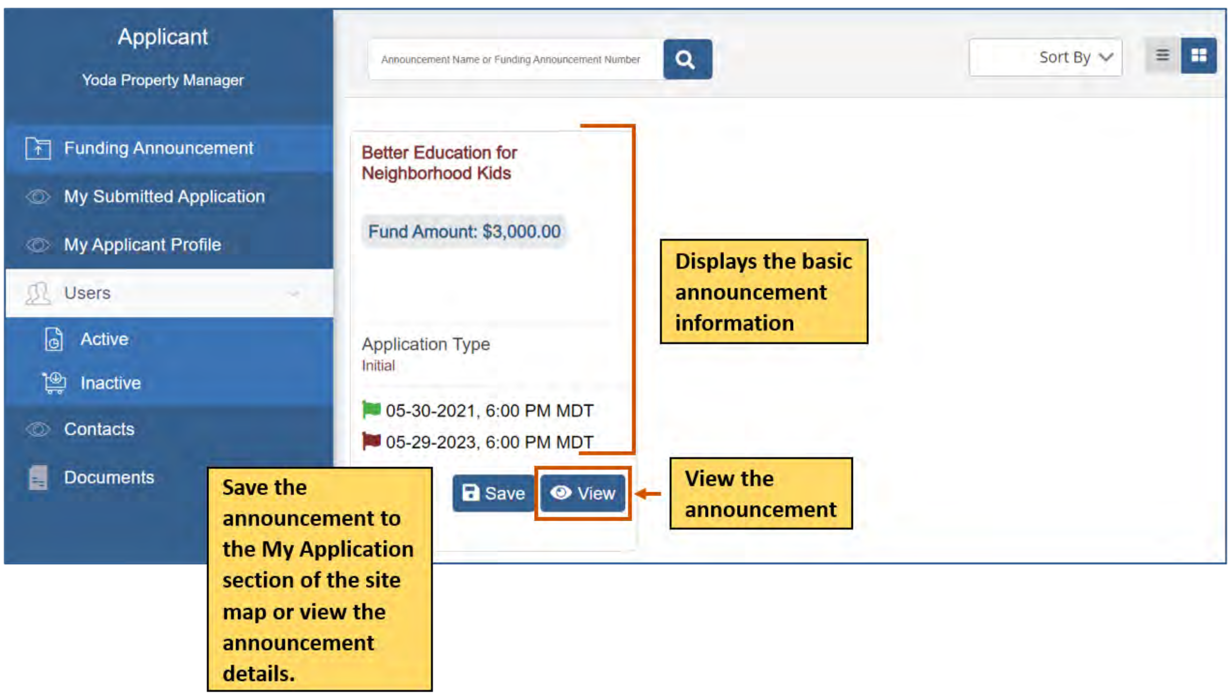
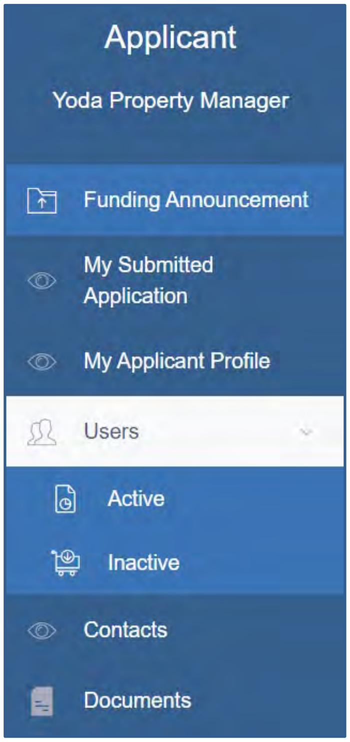



*Figure 9: Homepage Screen 2*

# 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.




| Site Map Options | Description |
|---|---|
| **Funding Announcement** | Displays all published announcements. |
| **My Submitted Application** | Displays all the announcements you have saved and/or applied to. |
| **My Applicant Profile** | View your Applicant Profile. You can add additional documents and relevant information such as a professional CV or other certifications related to the applicant or entity's qualifications. |
| **Users** | |
| **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

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.

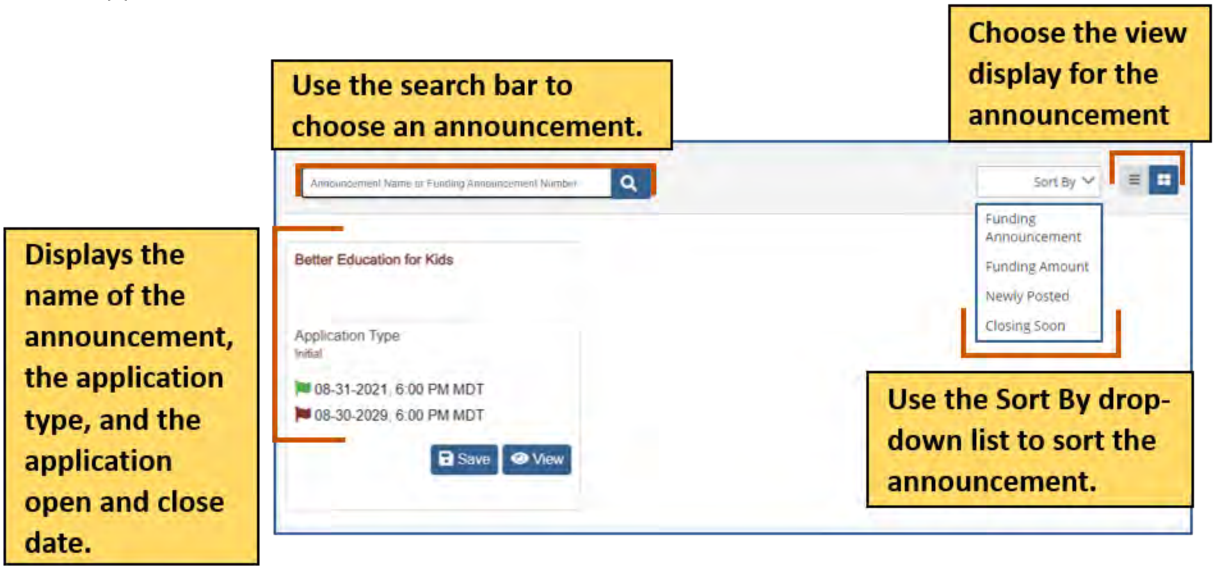



*Figure 10: Funding Announcement Screen 1*

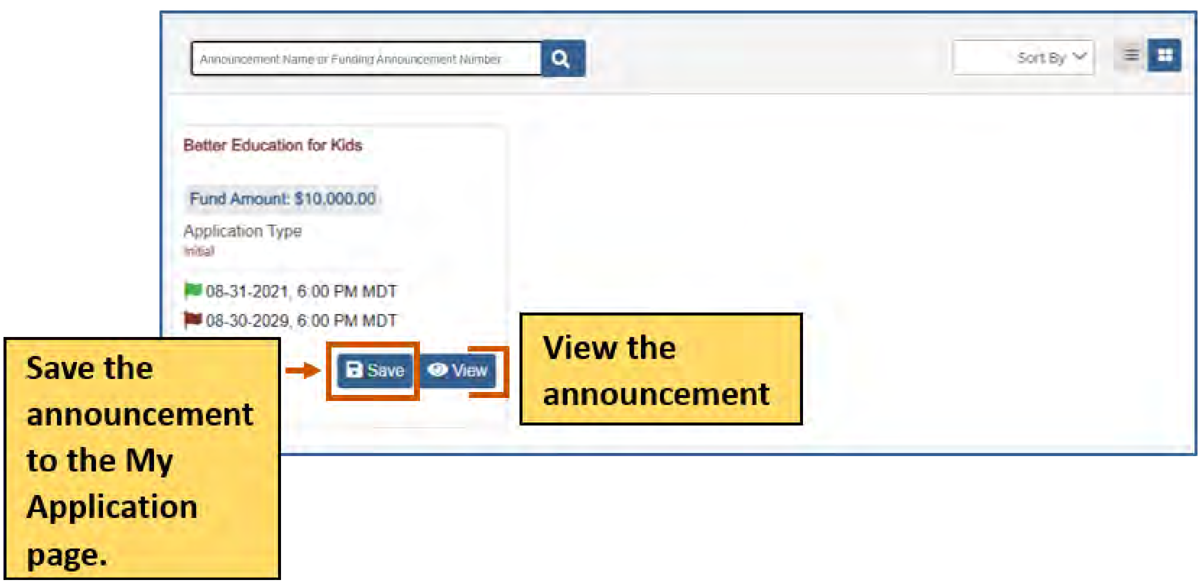



*Figure 11: Funding Announcement Screen 2*

## Save an Announcement

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

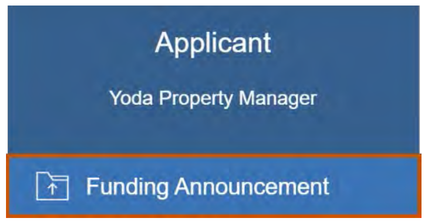



*Figure 12: Site Map – Funding Announcement*

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.

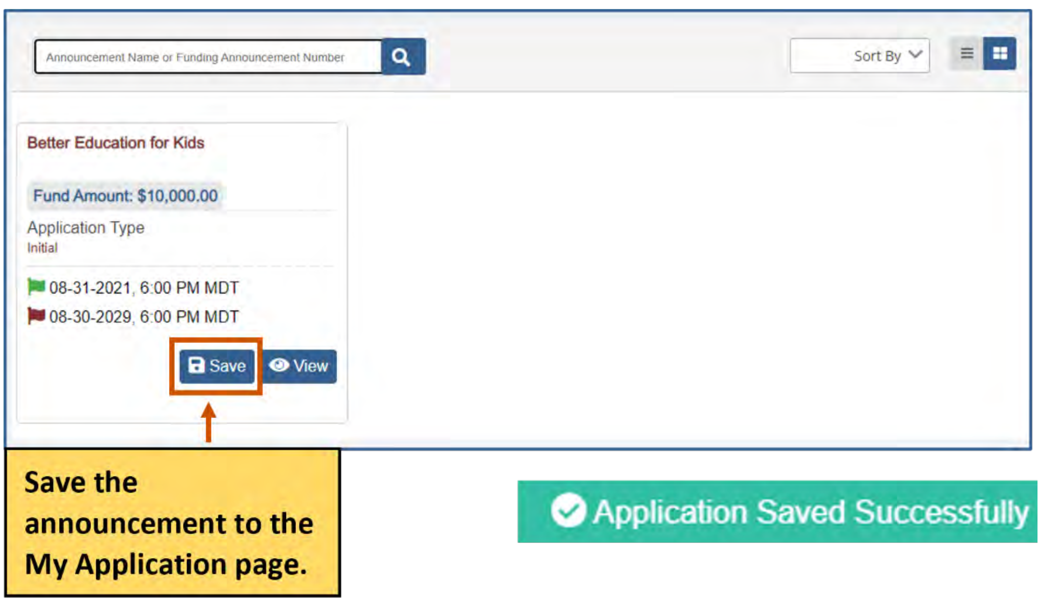



*Figure 13: Save Announcement*

## 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.

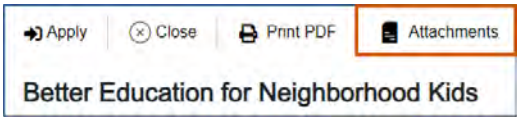



*Figure 15: View Attachments*

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

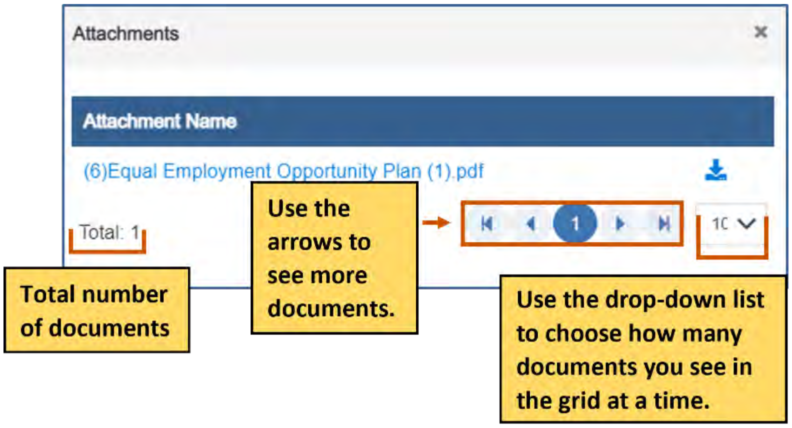



*Figure 16: Attachments Dialog Box 1*

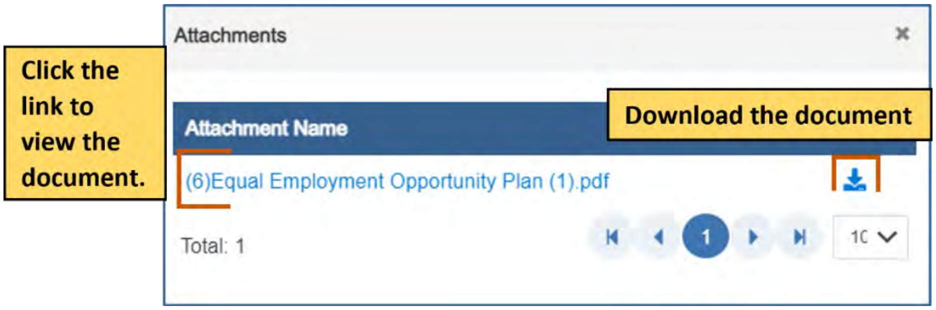



*Figure 17: Attachments Dialog Box 2*

## 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*

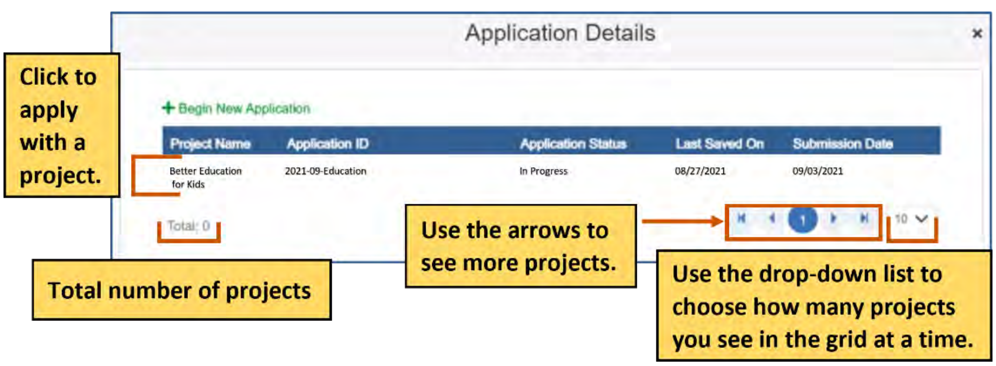



*Figure 20: Application Details Dialog Box*

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

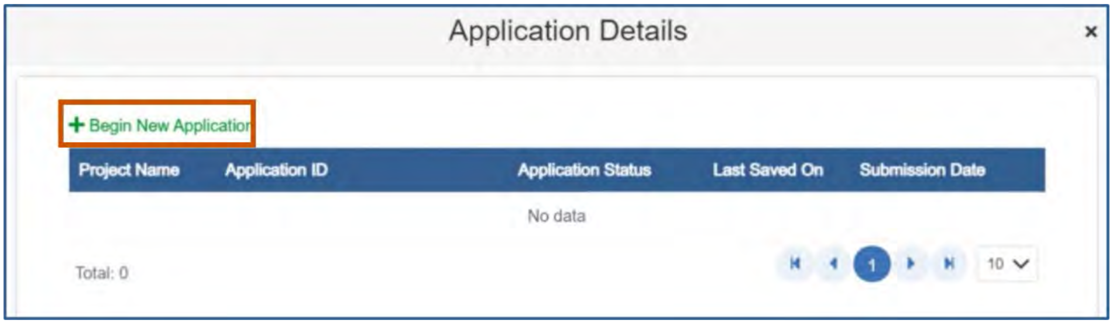



*Figure 21: Begin New Application*

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

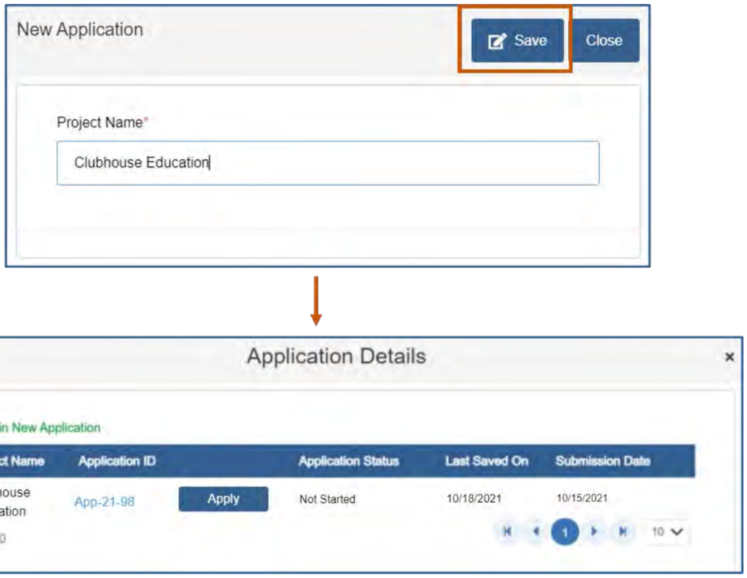



*Figure 22: New Application Dialog Box*

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

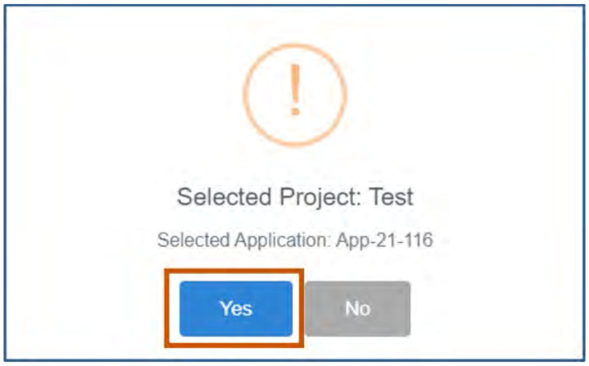



*Figure 23: Warning Choose Project*

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

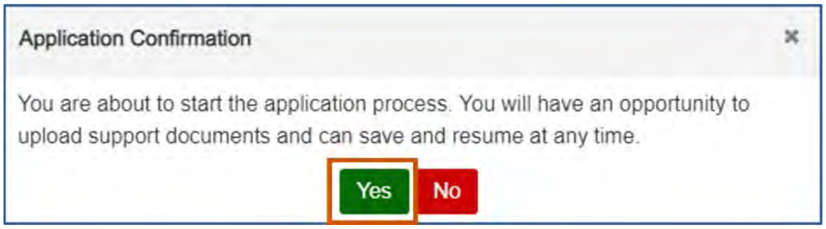



*Figure 24: Application Confirmation Dialog Box*

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.
   **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.

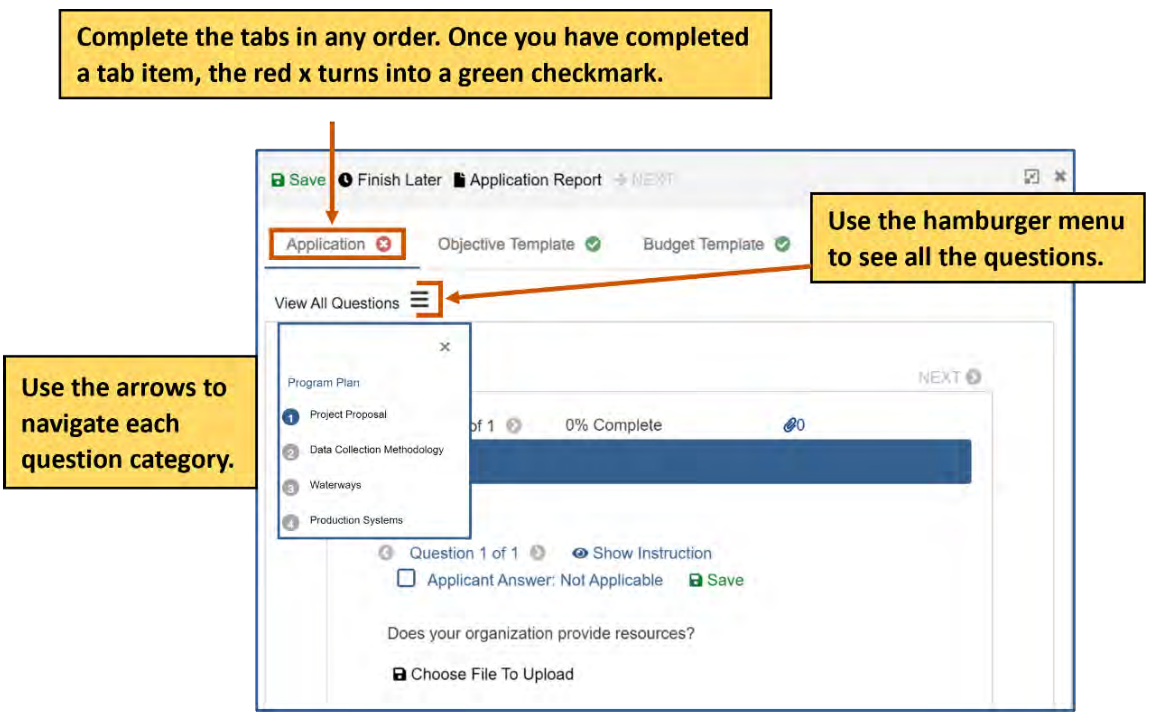



*Figure 25: Use Hamburger Menu*

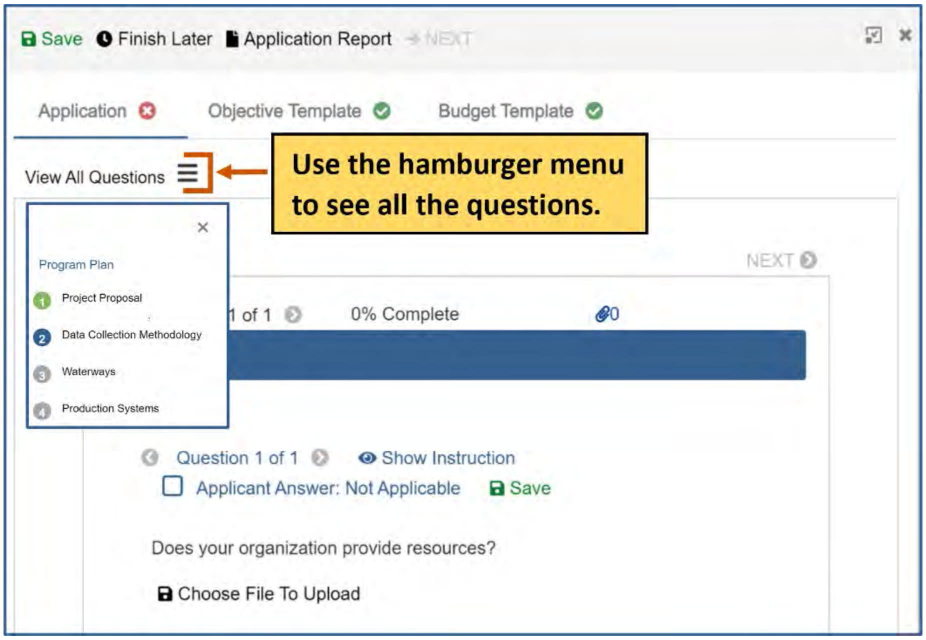



*Figure 26: Humber Menu Status*

b. Use the arrows to navigate the questions

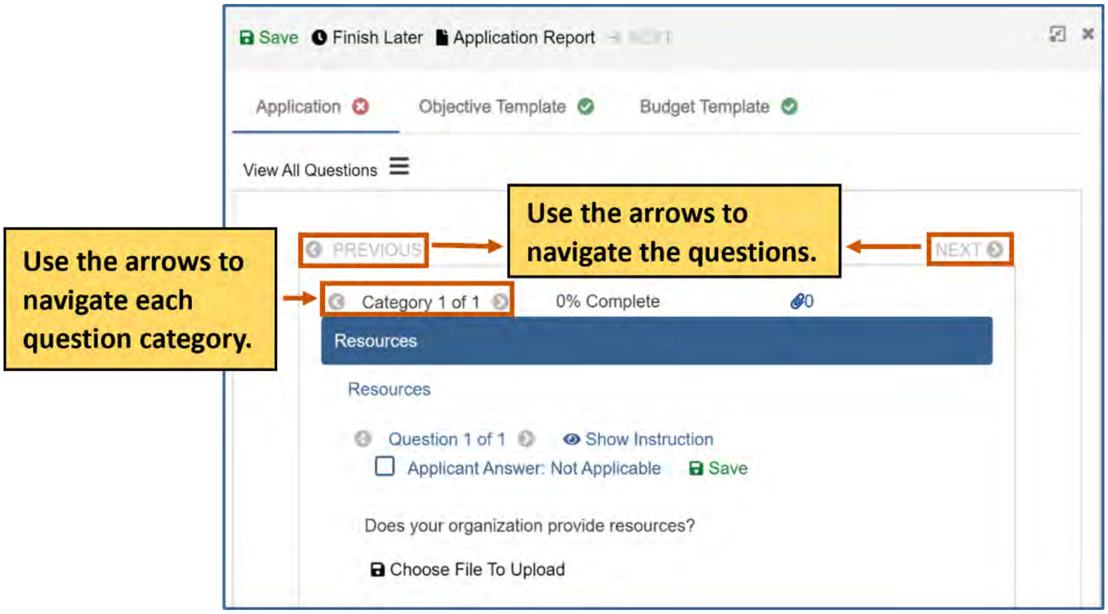



*Figure 27: Use Arrows through Questions*

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

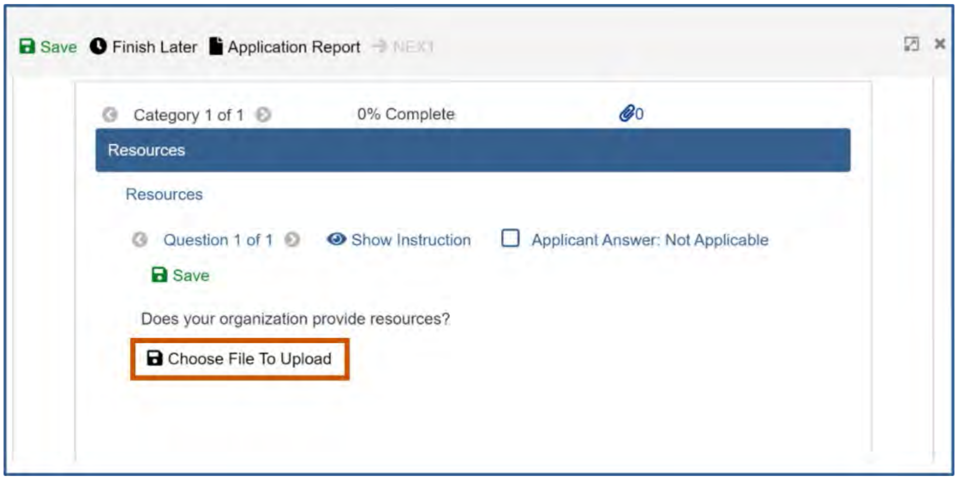



*Figure 28: Add Attachment to Question*

ii. Choose from the picklist.

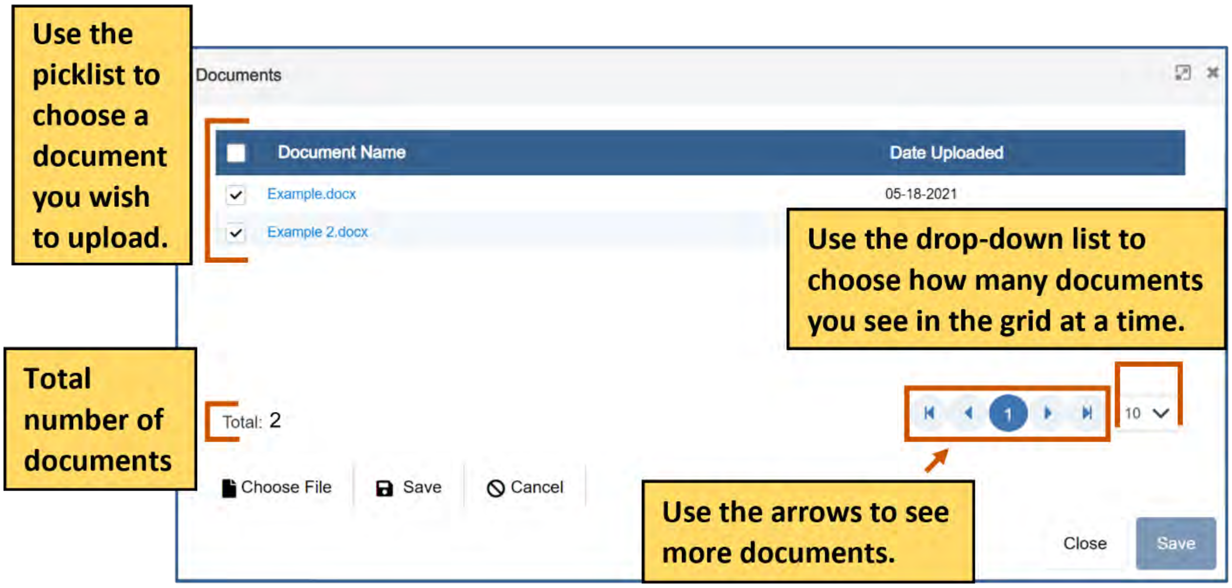



*Figure 29: Choose Attachment for Question*

Or

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

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

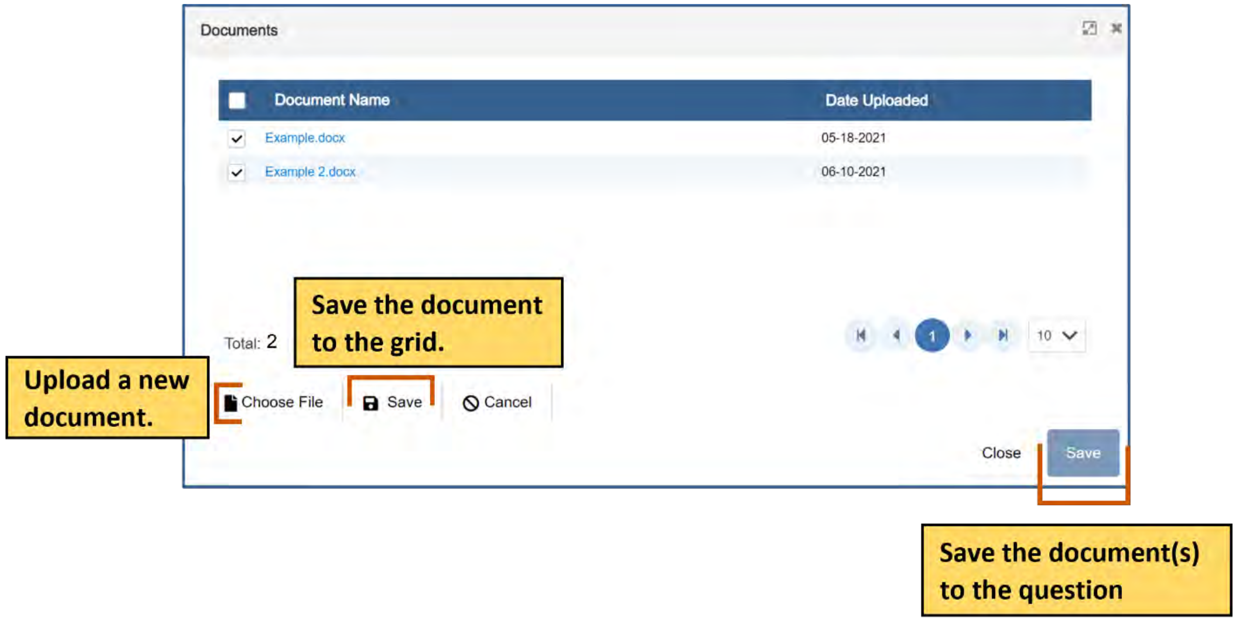



*Figure 30: Upload Attachment*

Make sure all questions are complete.

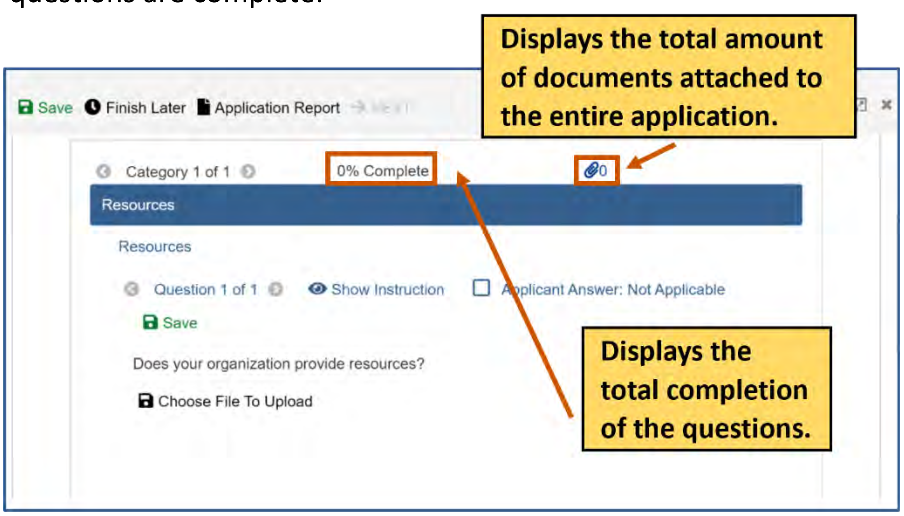



*Figure 31: Question Completion*

Complete the Objective Template:

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

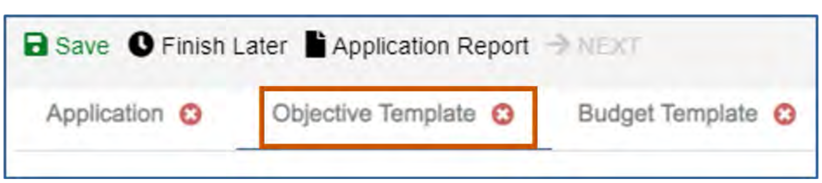



*Figure 32: Complete Objective Template*

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

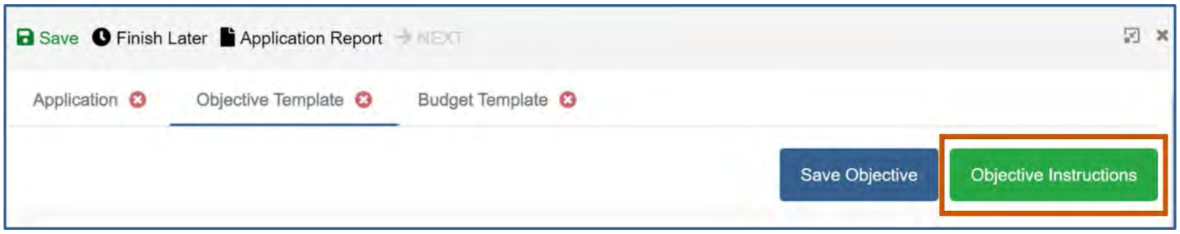



*Figure 33: View Objective Instructions*

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.

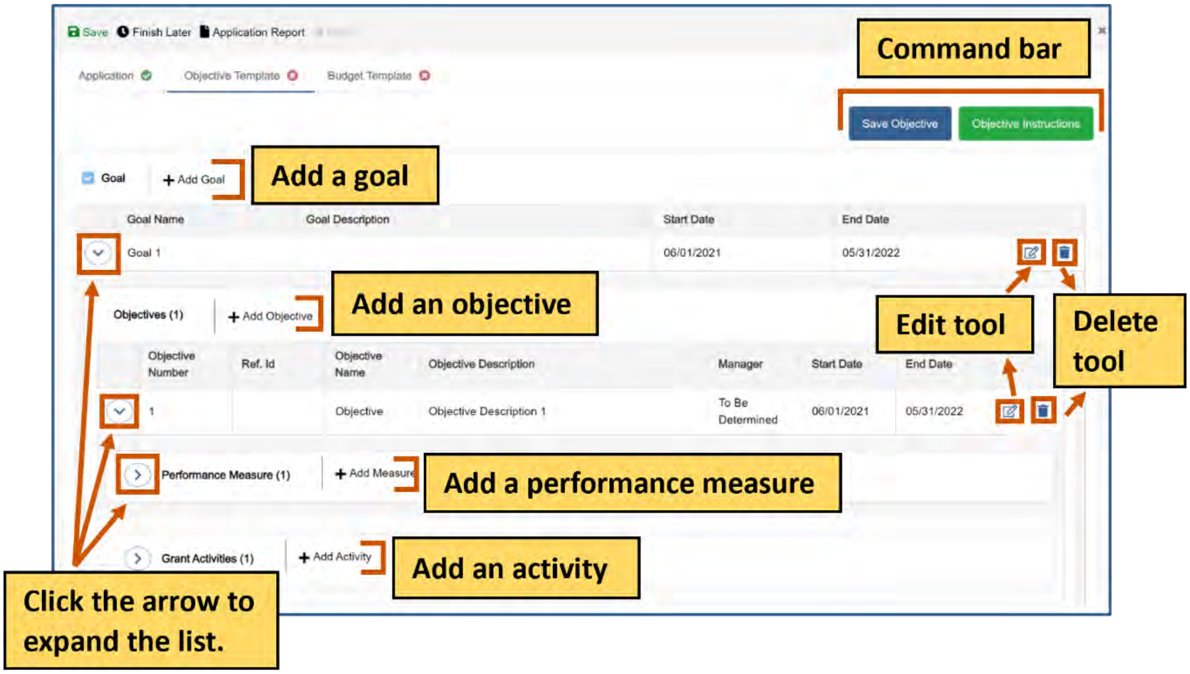



*Figure 35: Objective Template*

| 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.

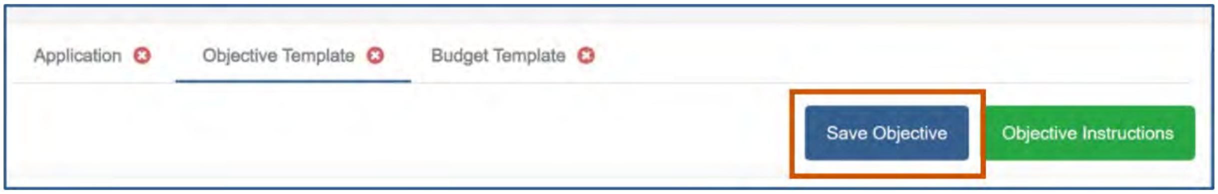



*Figure 36: Save Objective Template*

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.

ⓘ **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.

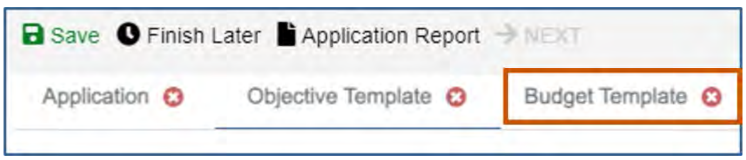



*Figure 38: Complete Budget Template*

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.

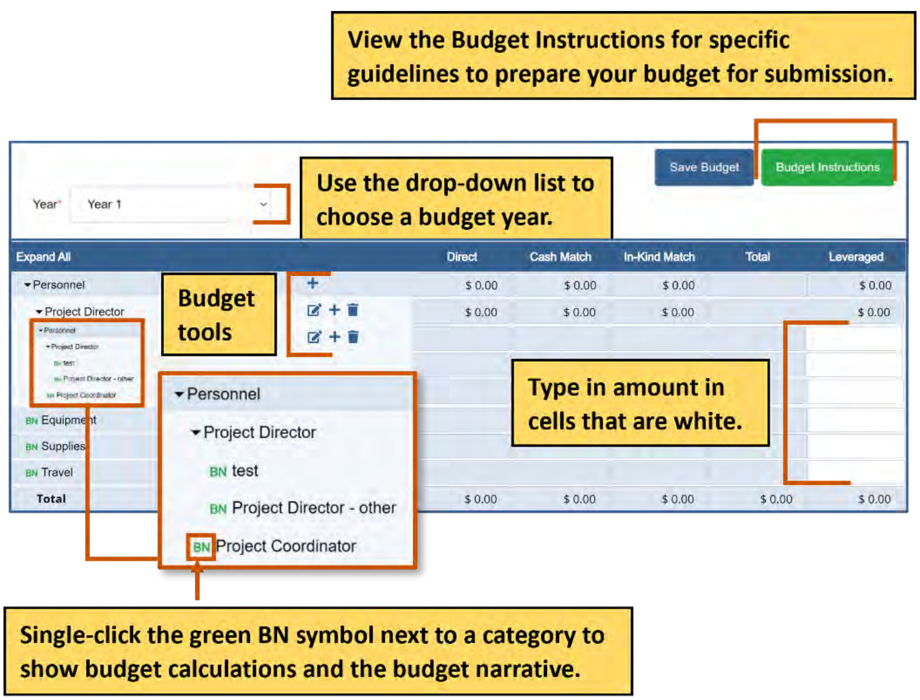



*Figure 39: Budget Template*

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.**

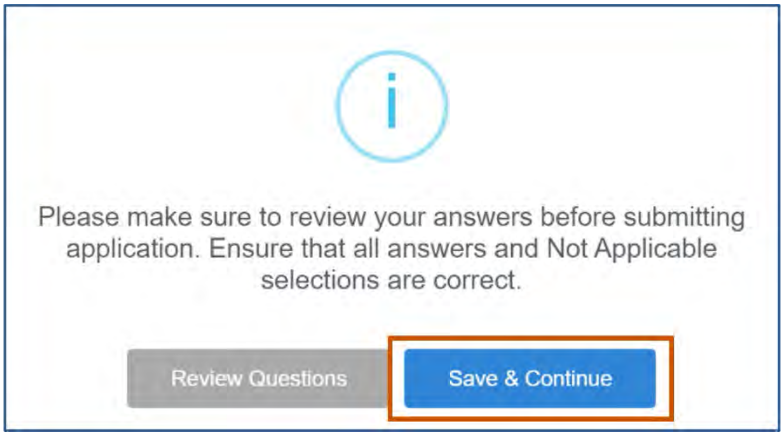



*Figure 43: Warning to Check Questions*

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

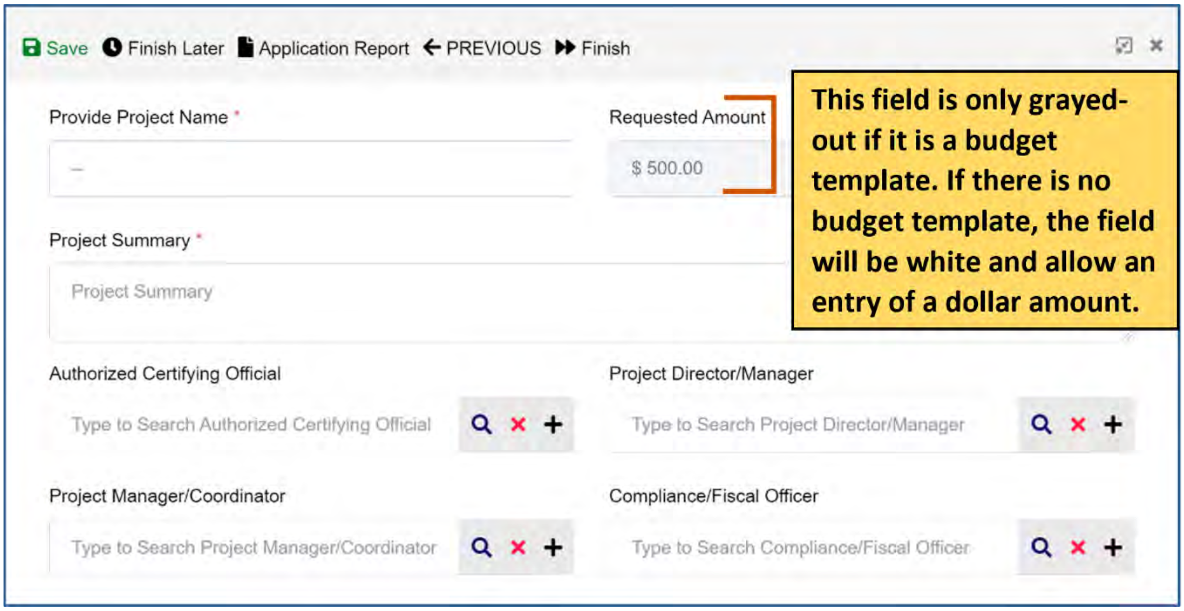



*Figure 44: Project Information*

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.

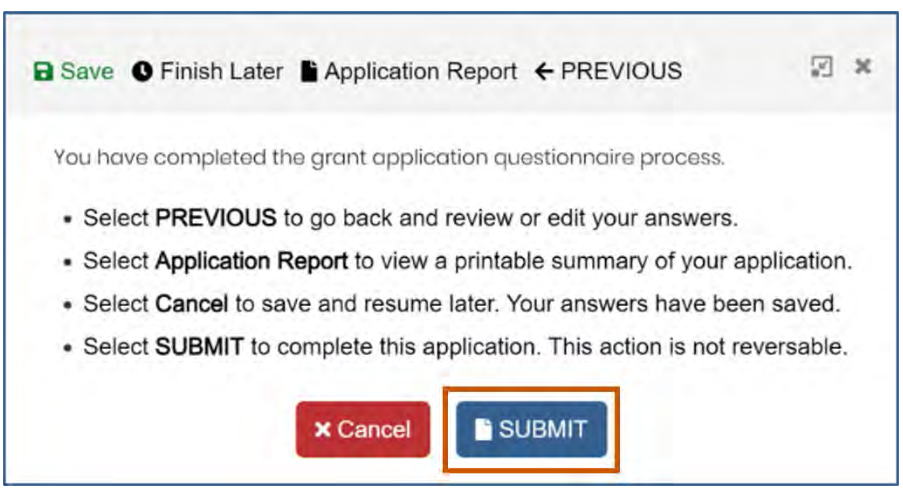



*Figure 46: Submit Application*

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

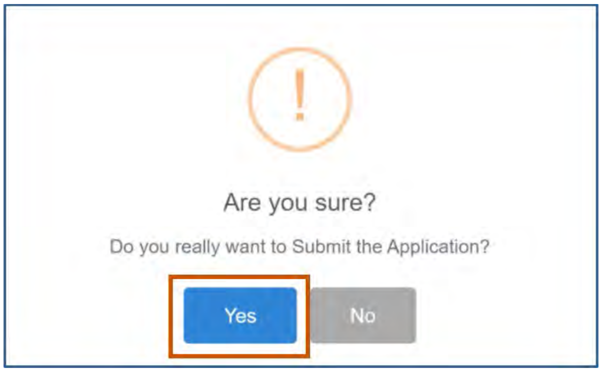



*Figure 47: Warning to Submit Application*

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.

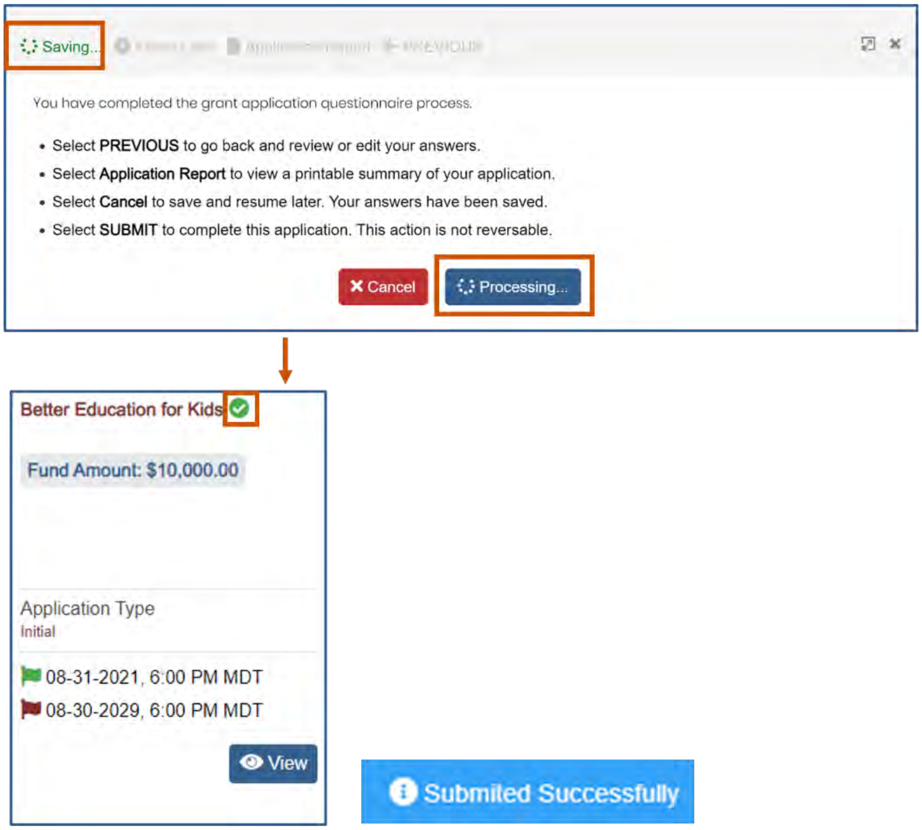



*Figure 48: Submit Successful*

# My Submitted Application

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

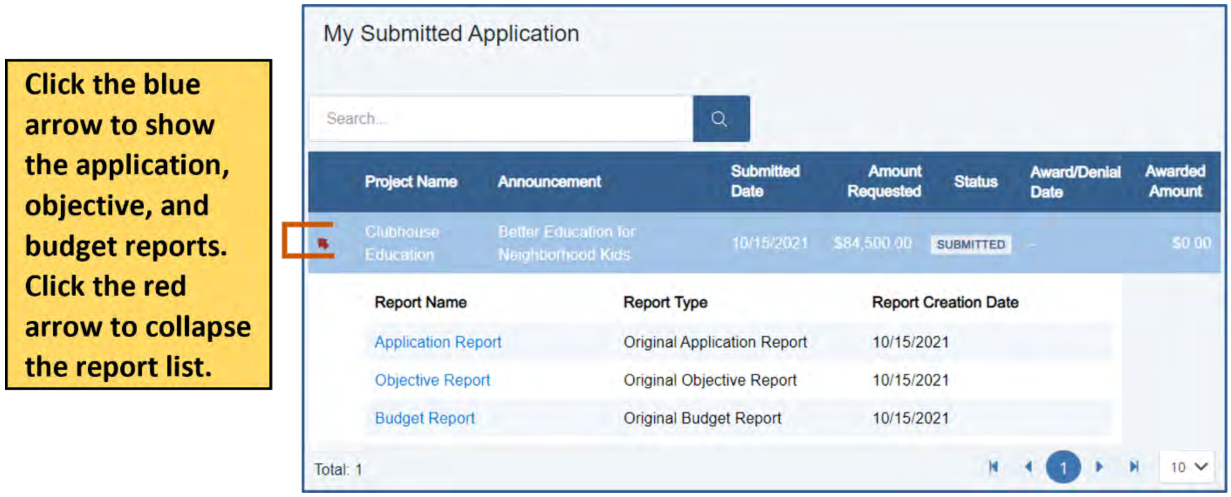



*Figure 49: My Submitted Application Screen*

## View Reports

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

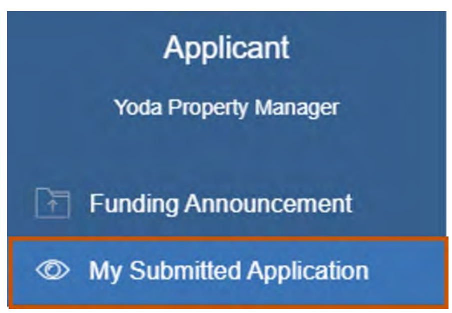



*Figure 50: My Site – My Submitted Application*

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

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

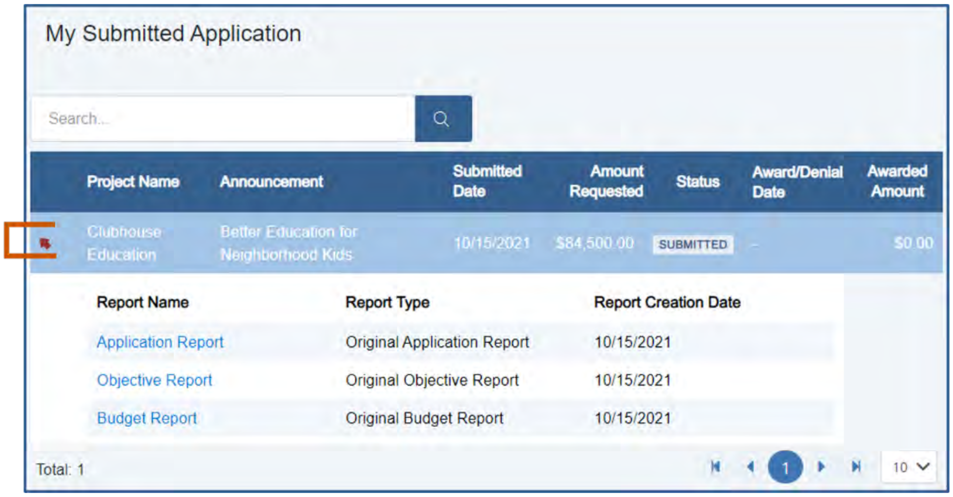



*Figure 51: My Submitted Application Screen*

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

**Click the link to one of the reports.**

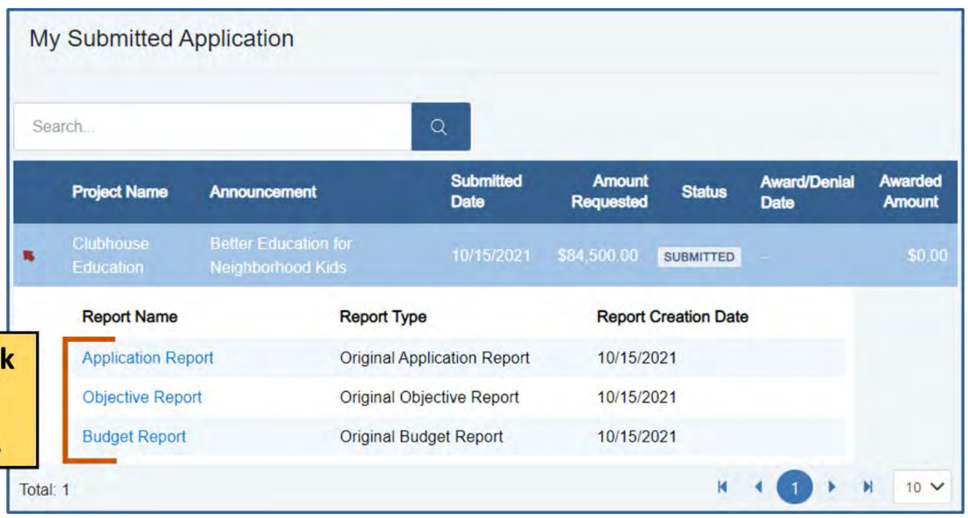



*Figure 52: Click Link to Report*

# 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.

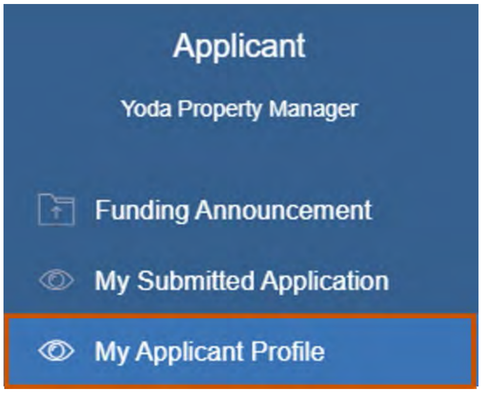



*Figure 53: Site Map – My Applicant Profile*

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.

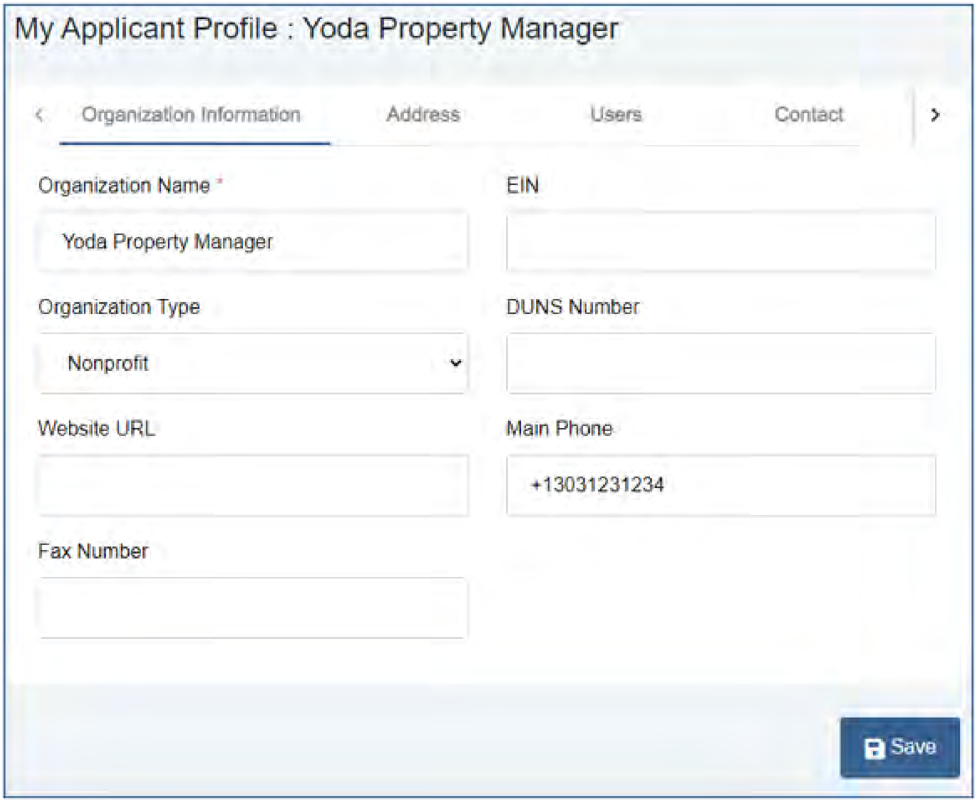



*Figure 54: My Applicant Profile – Organization Information Tab*

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

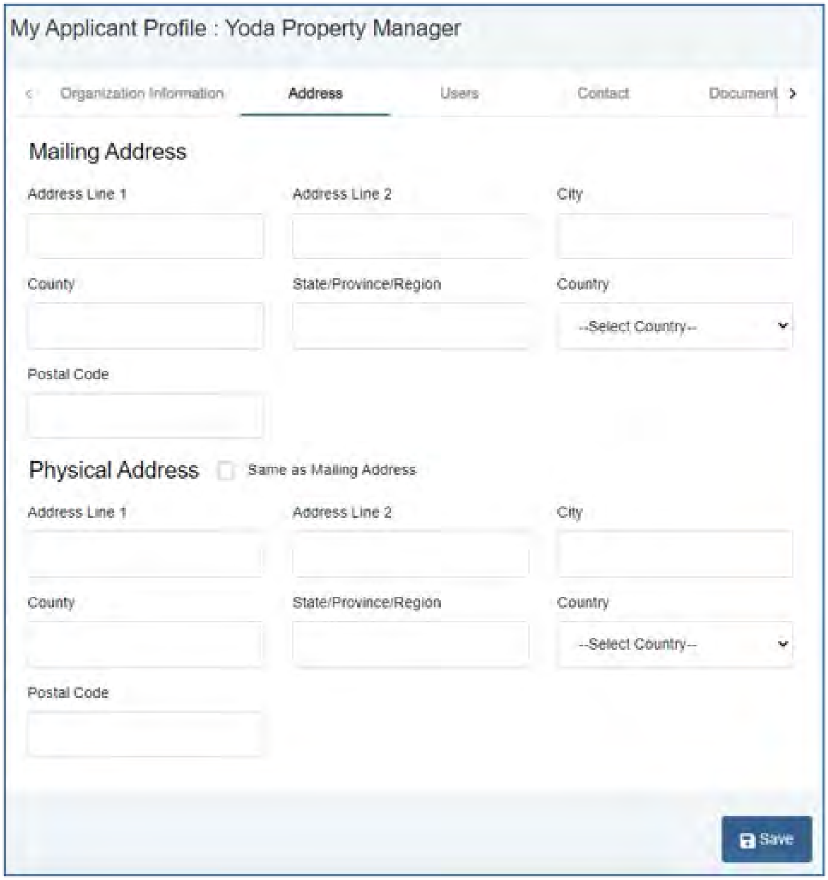



*Figure 55: My Applicant Profile – Address Tab*

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

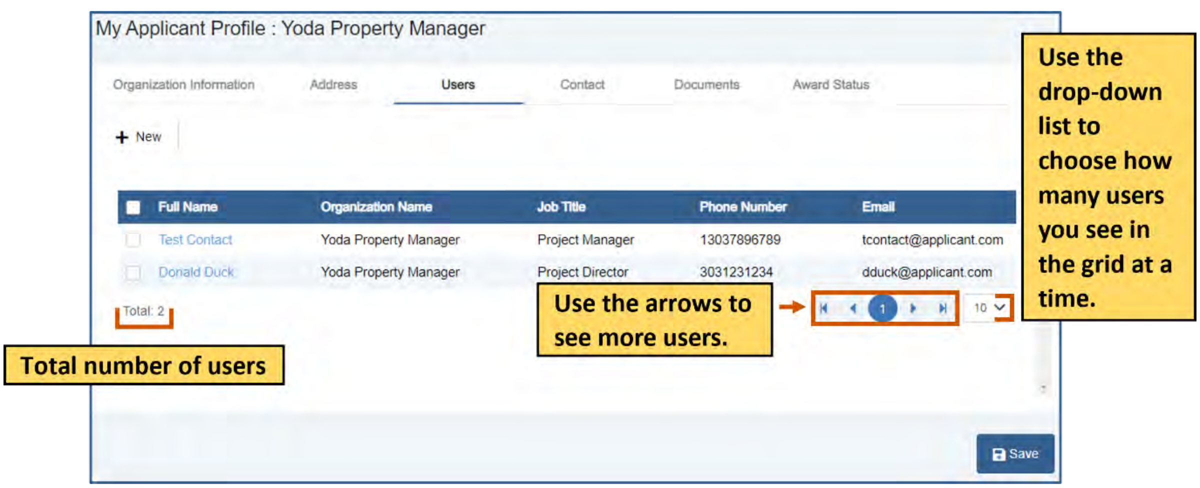



*Figure 56: My Applicant Profile – Address Tab*

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

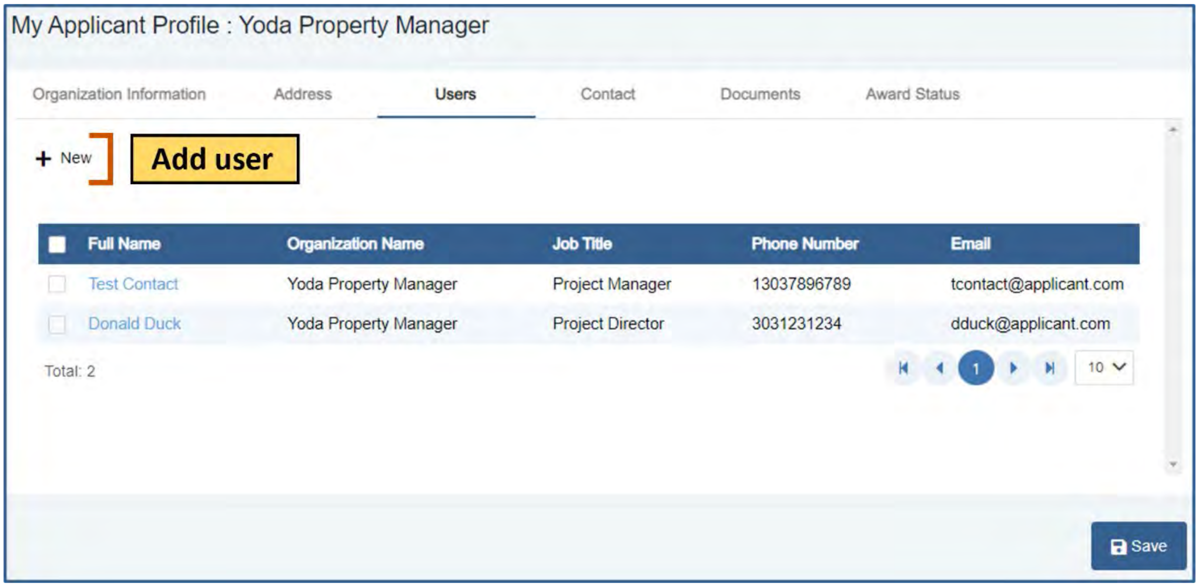



*Figure 57: Add User*

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

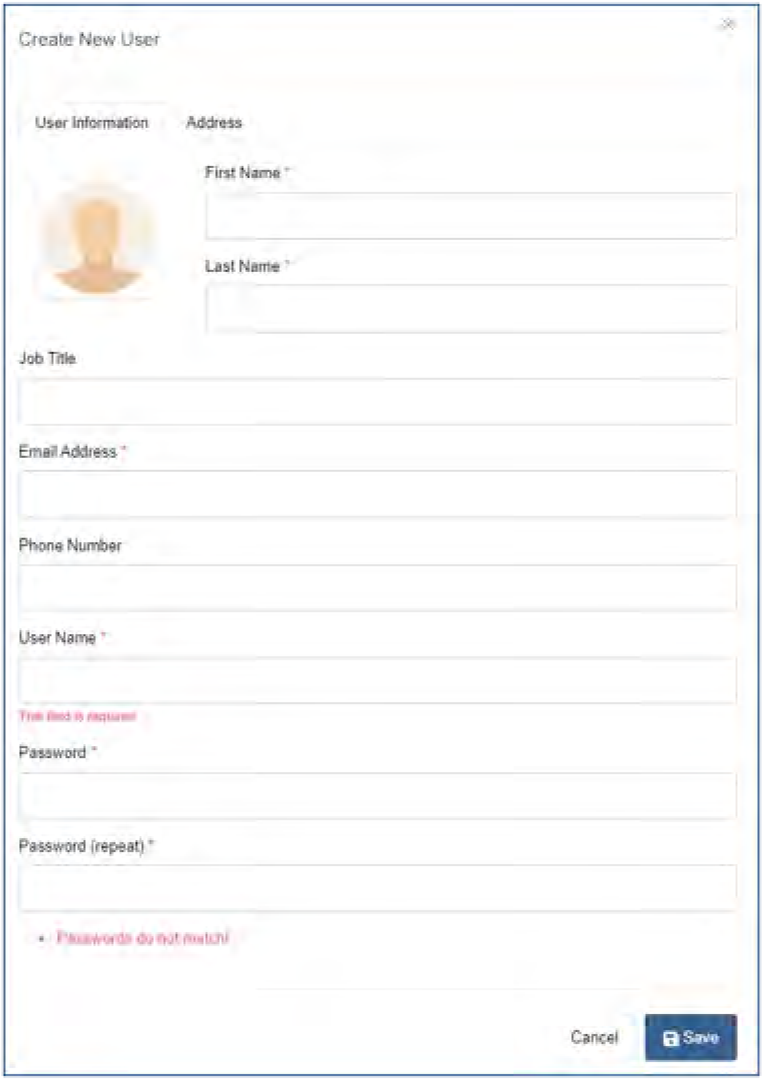



*Figure 58: Create New User – User Information Tab*

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.

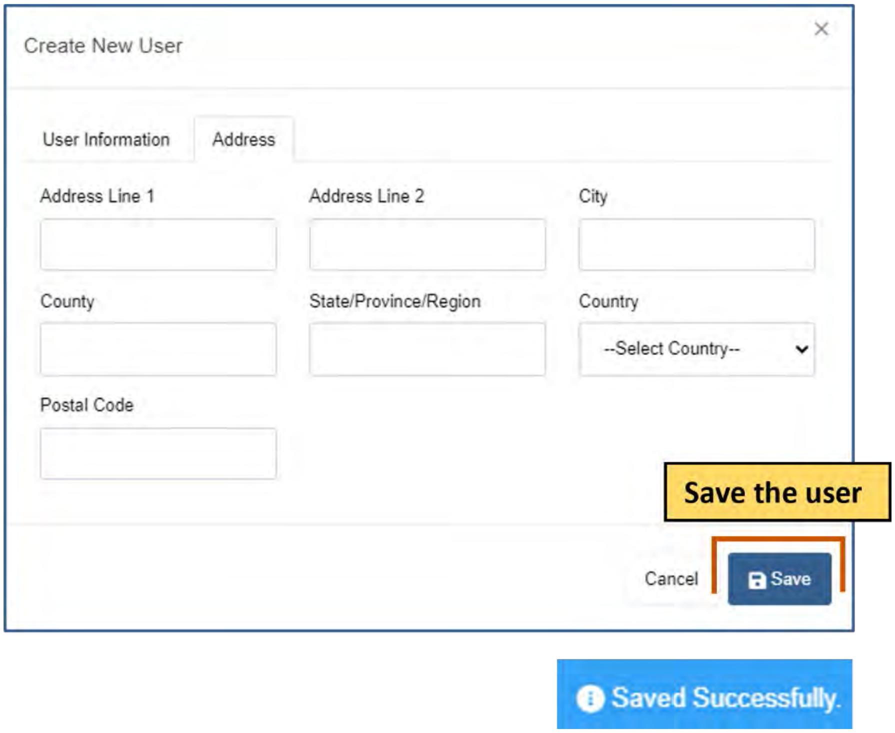



*Figure 59: Create New User – Address Tab*

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

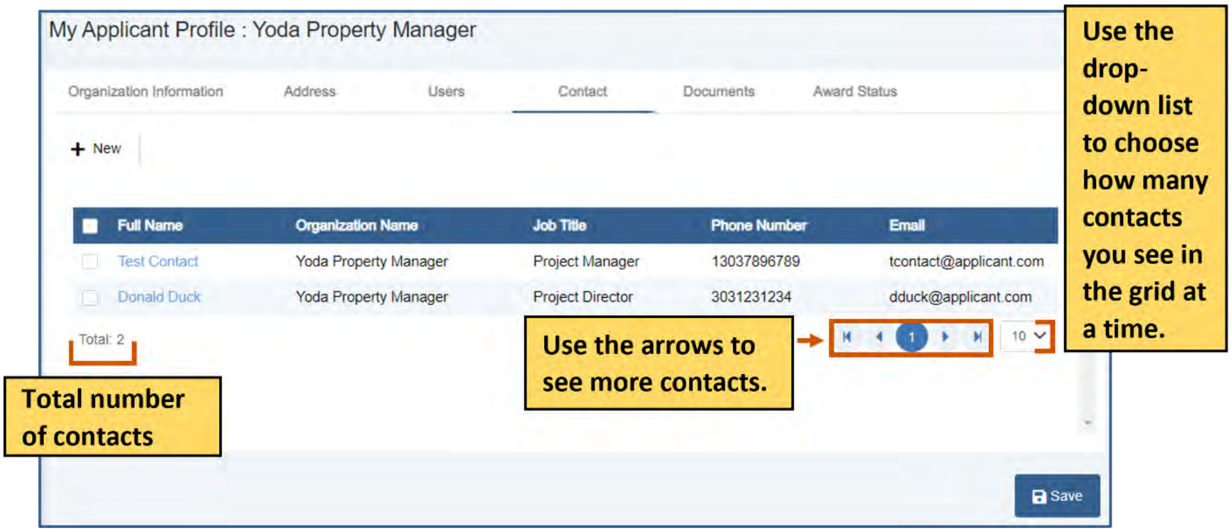



*Figure 60: Create New User – Contact Tab*

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

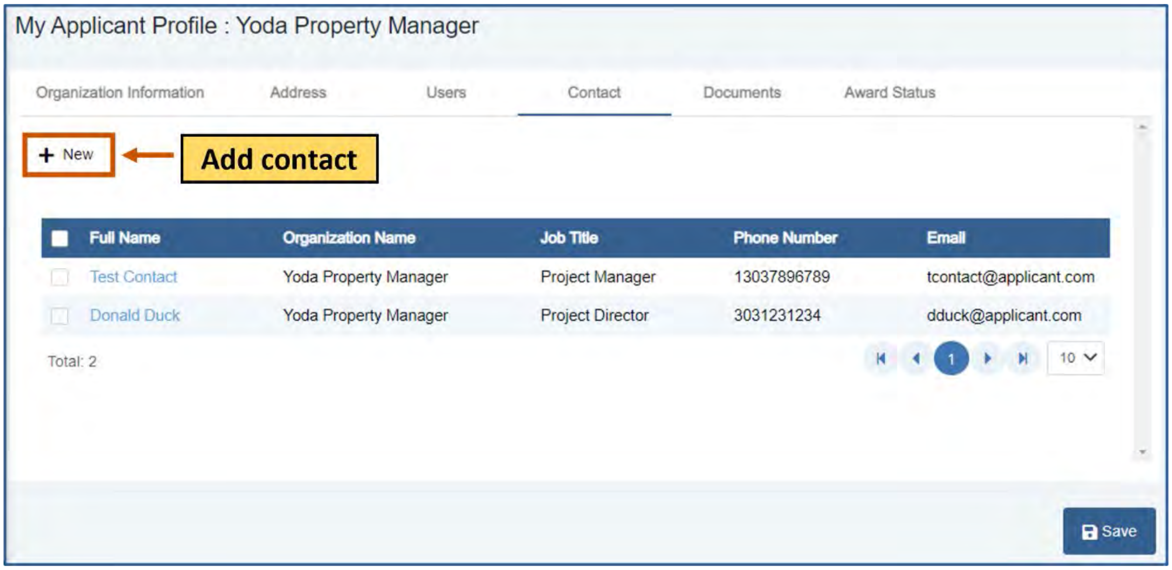



*Figure 61: Add Contact*

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

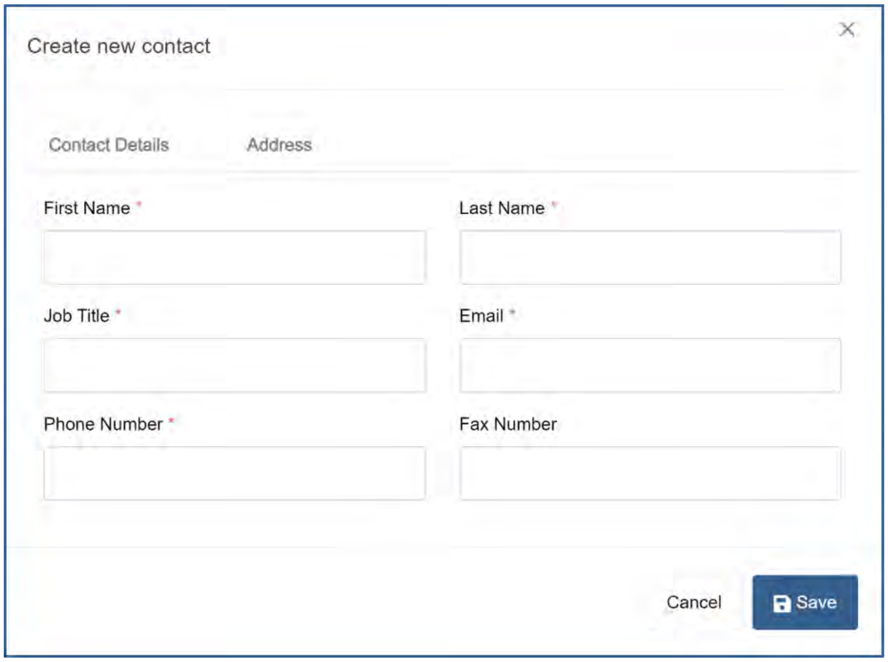



*Figure 62: Create New Contact – Contact Details Tab*

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.

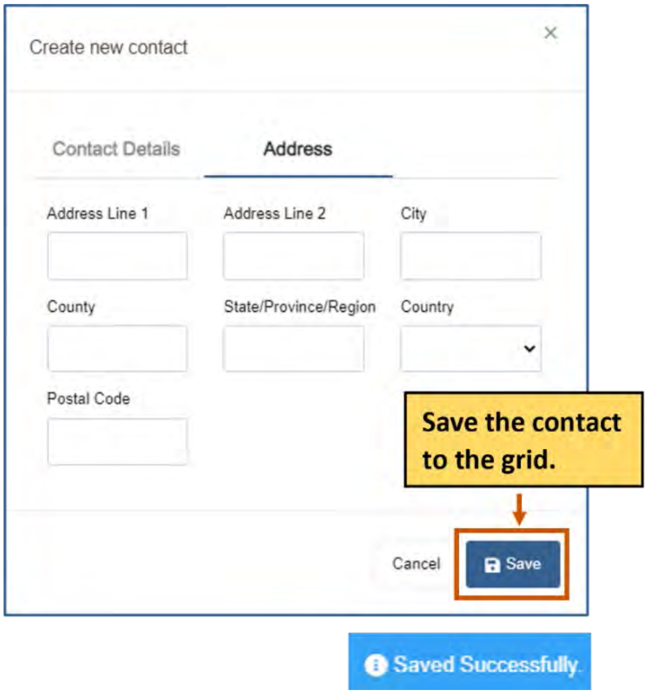



*Figure 63: Create New Contact – Address Tab*

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.

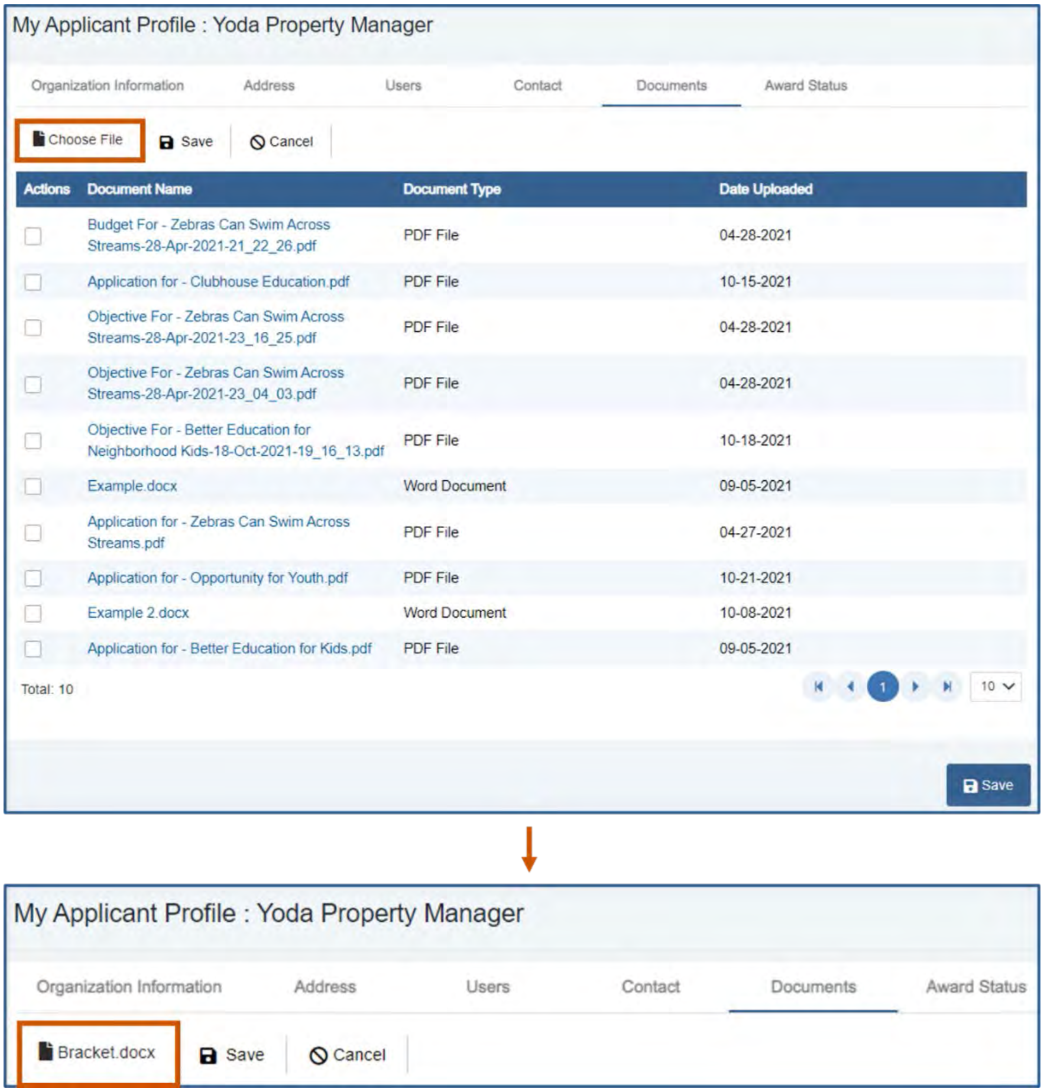



*Figure 64: Add Attachment to Profile*

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.

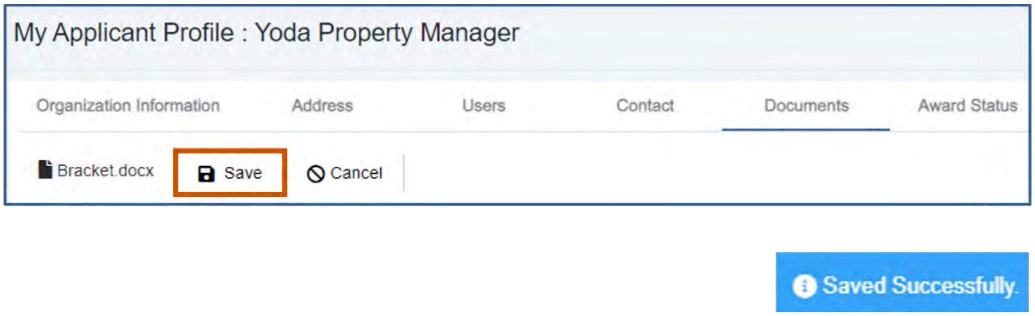



*Figure 65: Save Attachment to Profile*

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

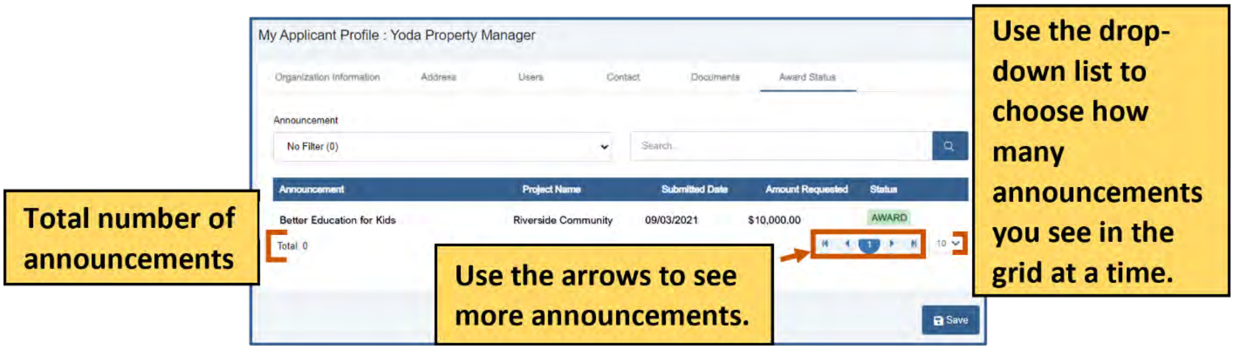



*Figure 66: Create New Contact – Award Status Tab*

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.

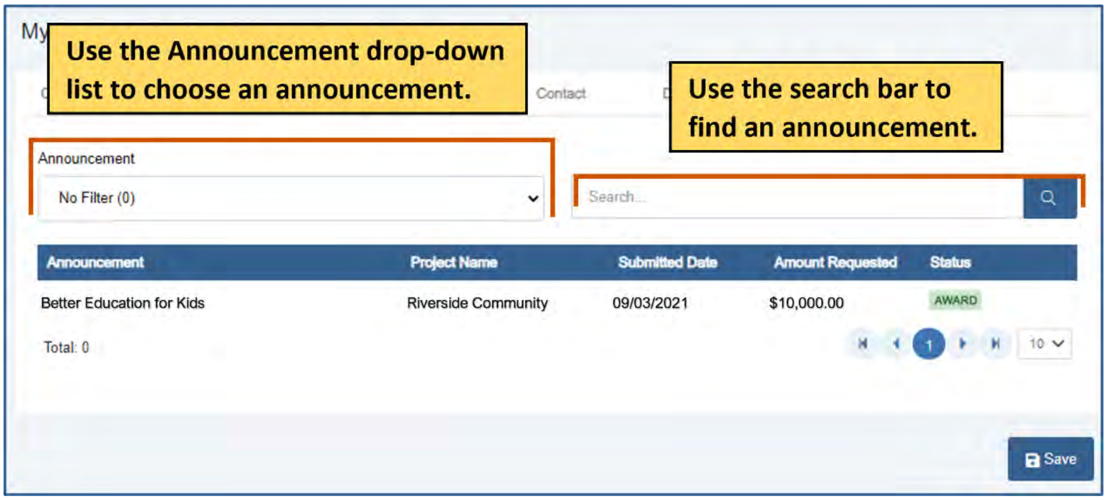



*Figure 67: Choose Announcement*

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.

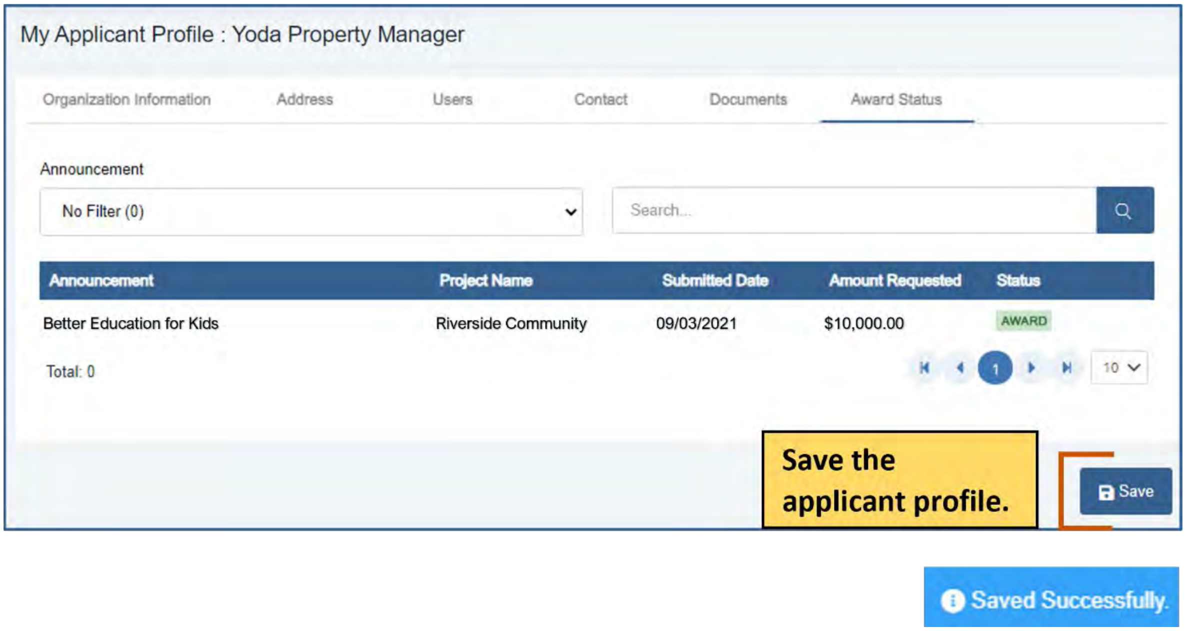



*Figure 68: Save Applicant Profile*

# Users

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

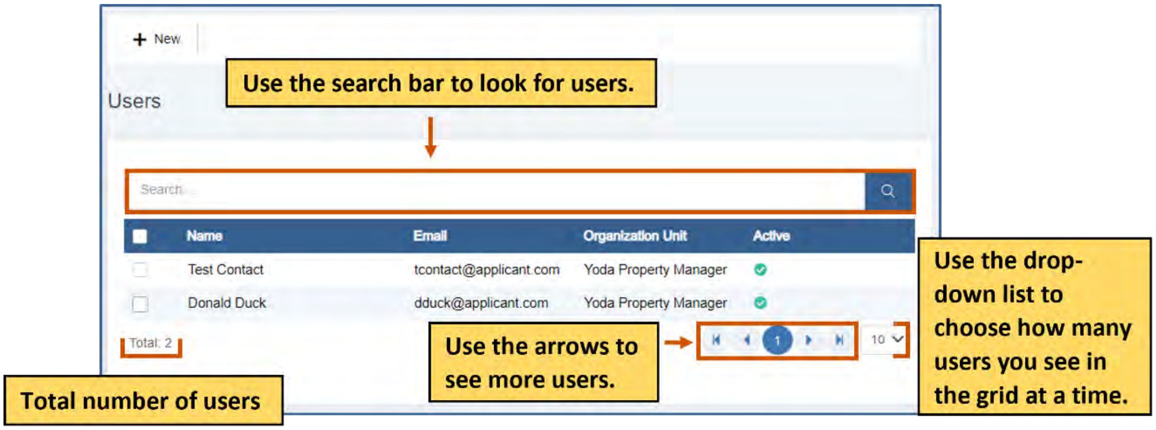



*Figure 69: Active Users Screen*

# Active

You can view active users.

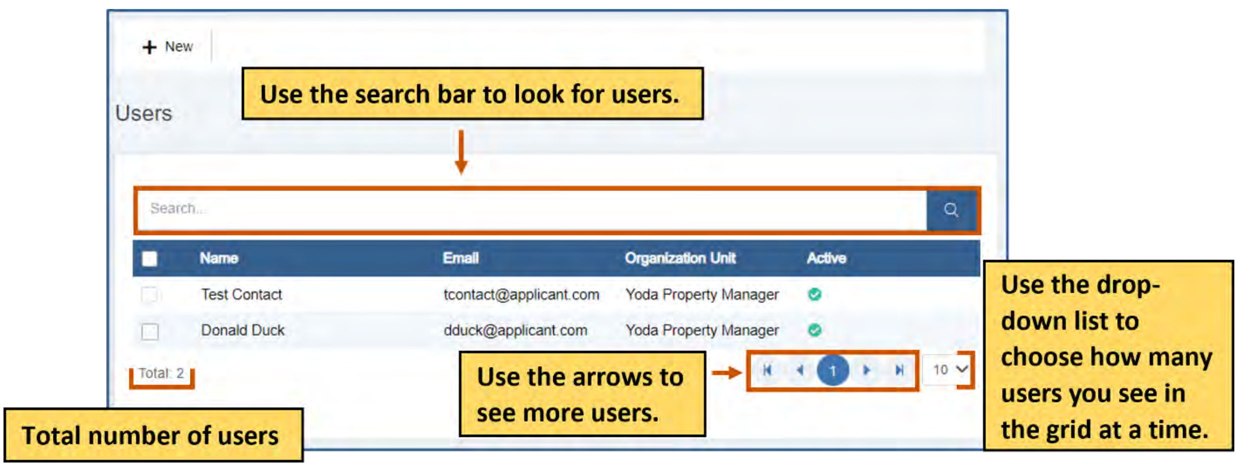



*Figure 70: Active Users Screen*

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

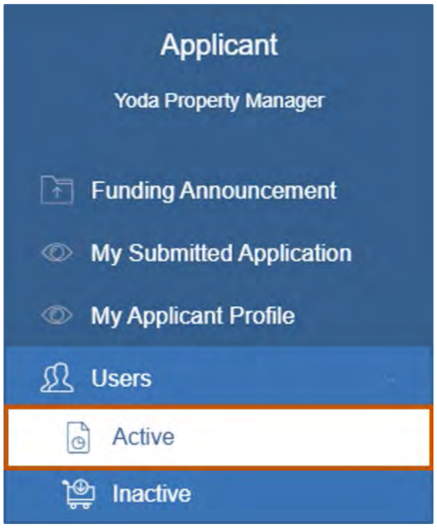



*Figure 71: Site Map – Active Users*

## Inactive

You can view inactive review panels.

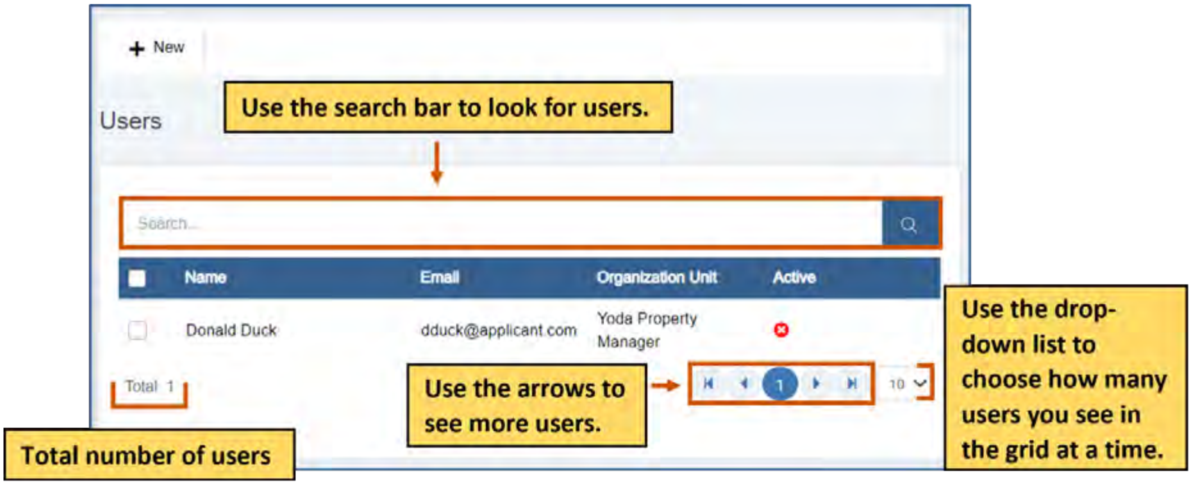



*Figure 72: Inactive Users Screen*

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

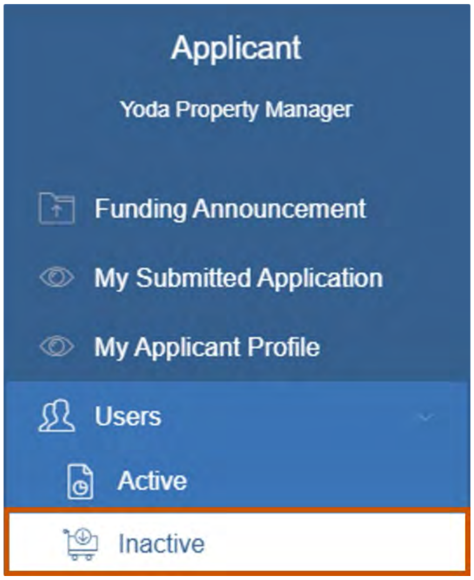



*Figure 73: Site Map – Inactive Users*

## 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.

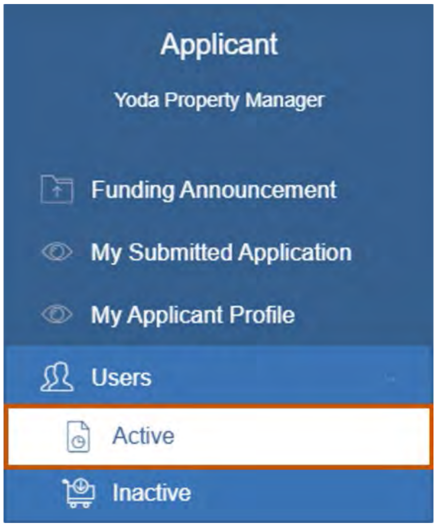



*Figure 74: Site Map – Active Users*

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

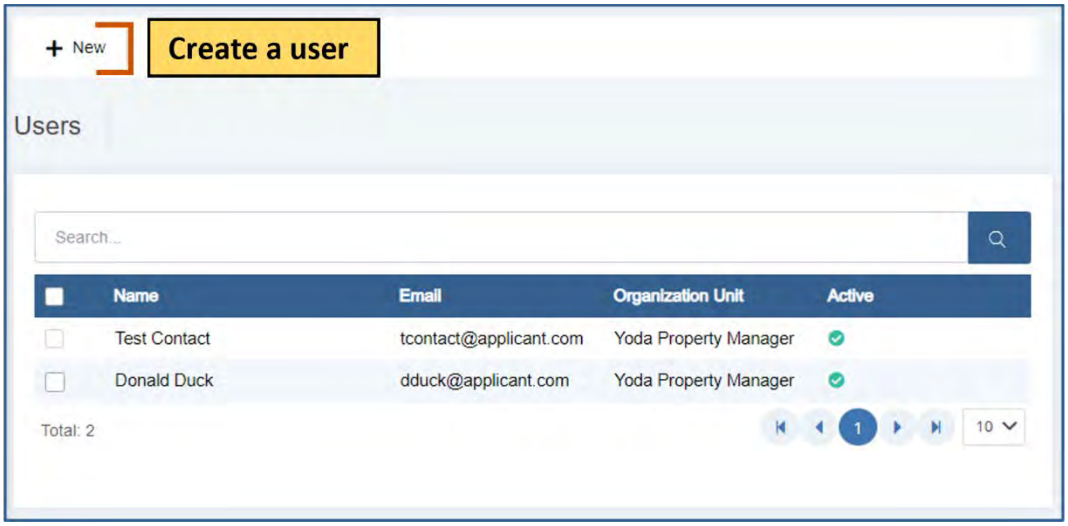



*Figure 75: Create User*

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

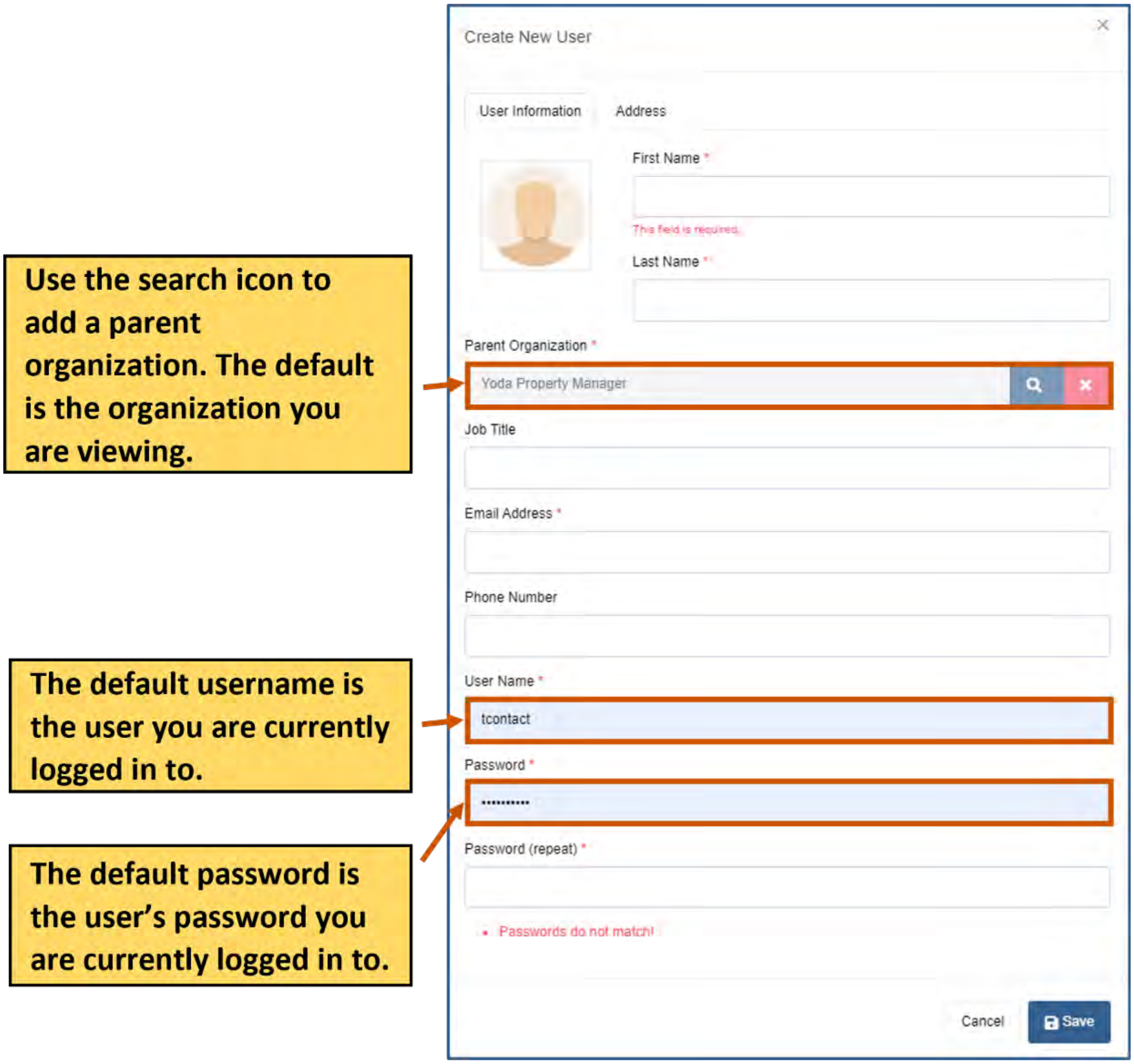



*Figure 76: User Screen – User Information Tab*

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

5. Click **Save** to save the user. They appear in the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 2-4 for each user.

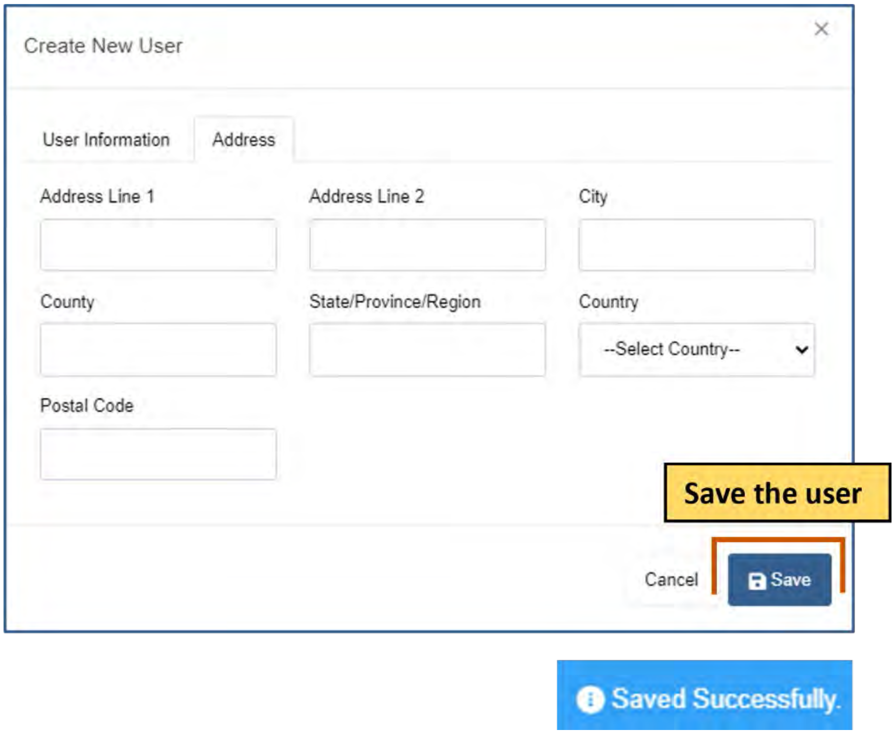



*Figure 77: Create New User – Address Tab*

## 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.

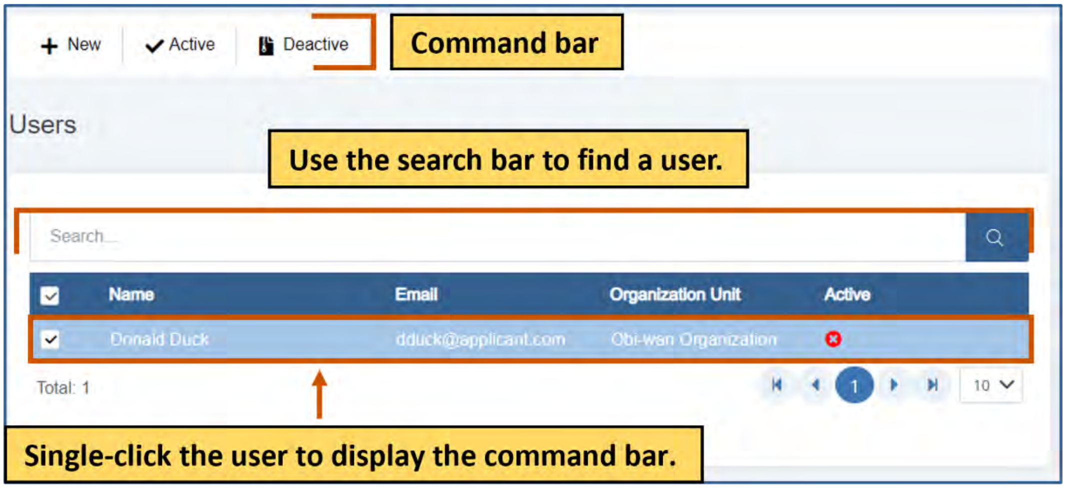



*Figure 78: Display User Commands*

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.

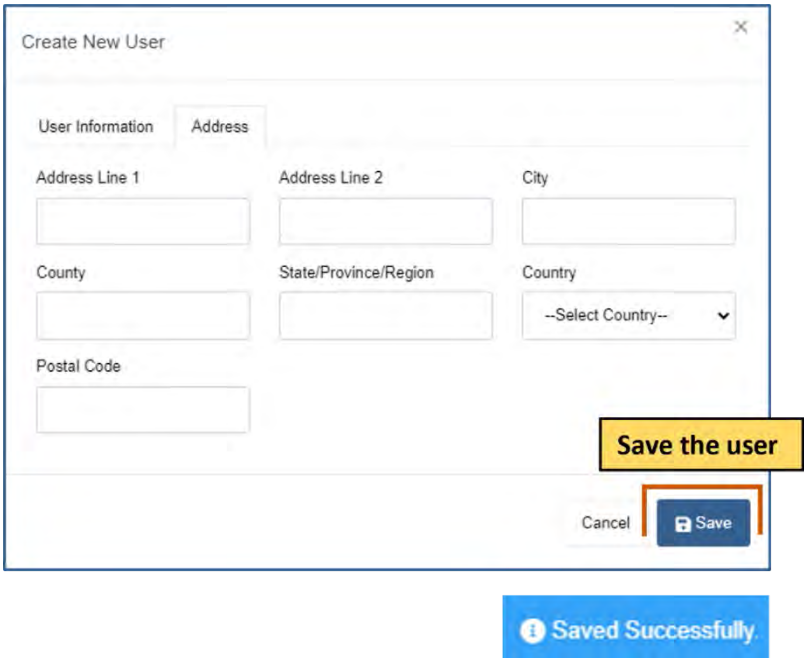



*Figure 79: Create New User – Address Tab*

## 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.

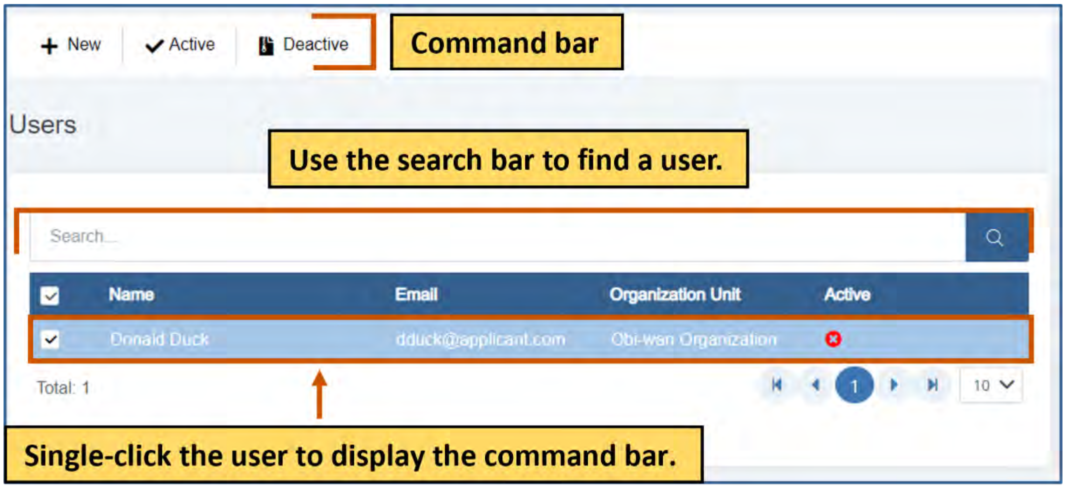



*Figure 80: Display User Commands*

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.

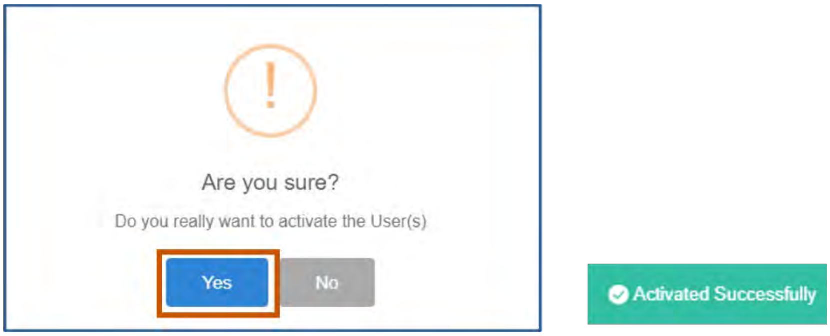



*Figure 82: Warning to Activate User*

## 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.

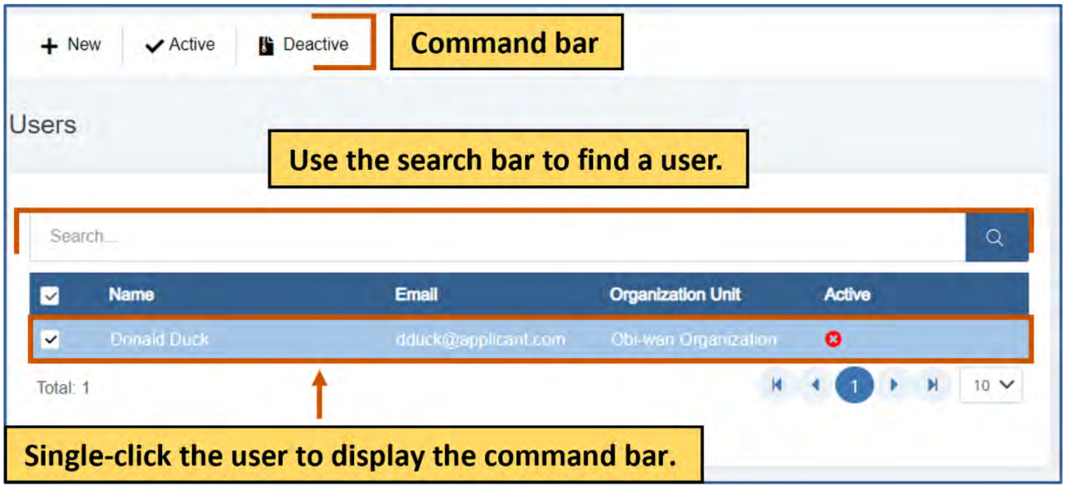



*Figure 83: Display User Commands*

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.

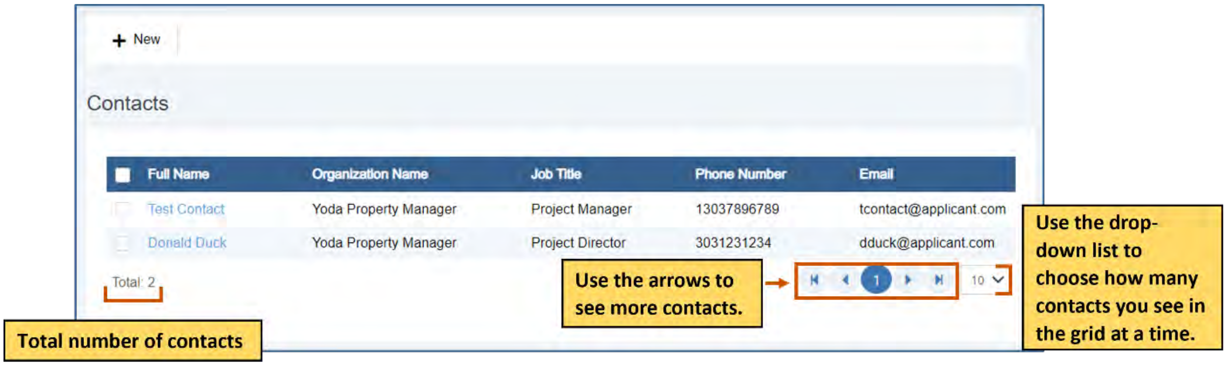



*Figure 86: Contacts Screen*

## Add a Contact

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

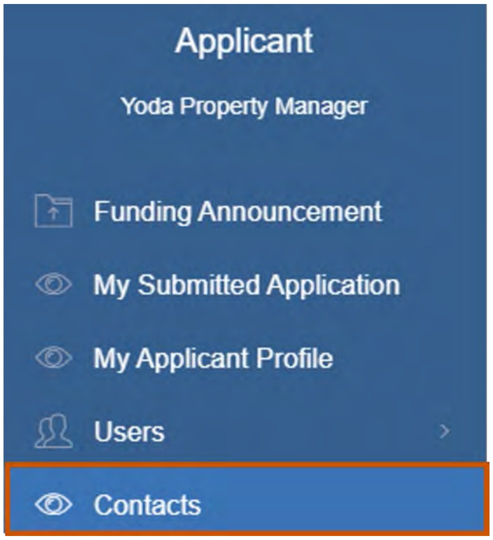



*Figure 87: Site Map - Contacts*

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

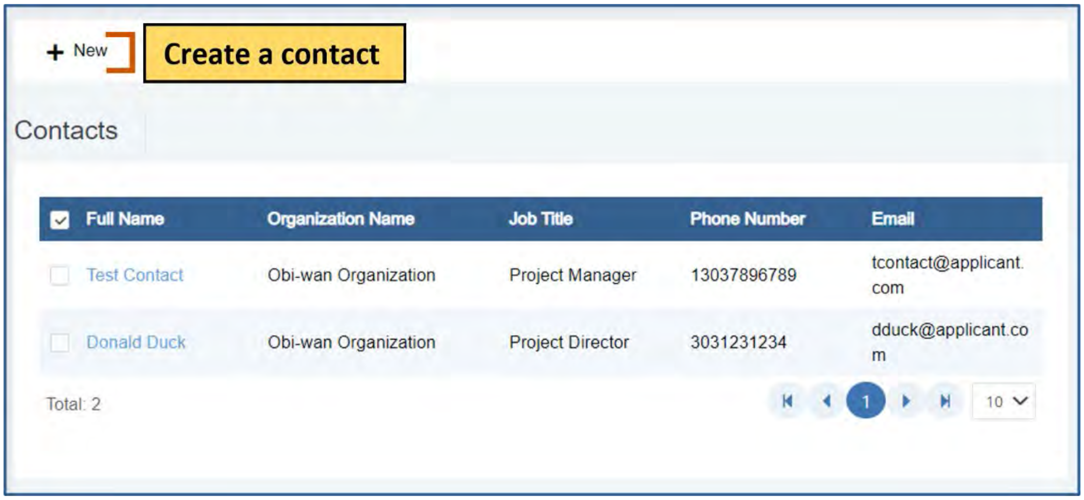



*Figure 88: New Contact*

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

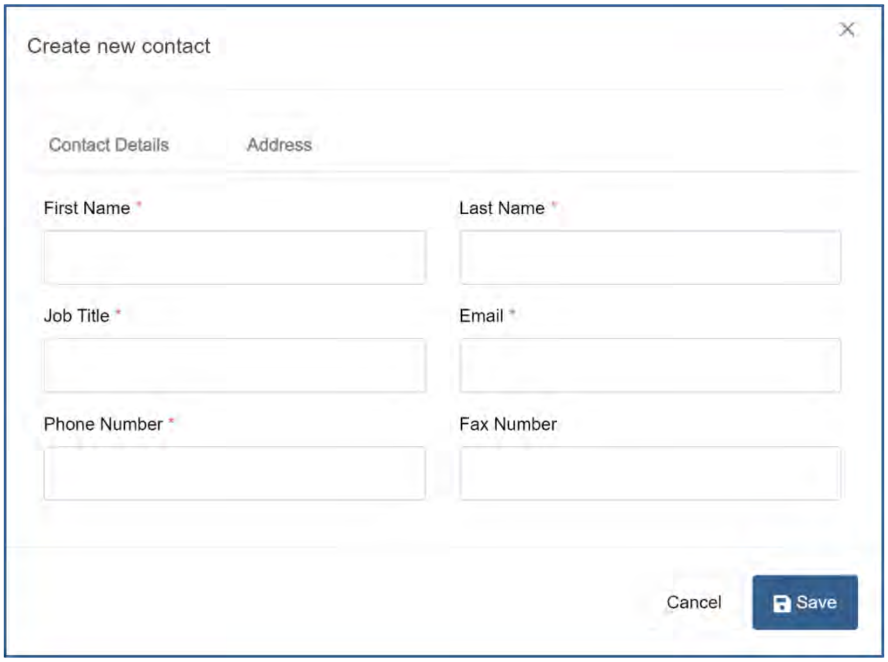



*Figure 89: Create New Contact – Contact Details Tab*

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

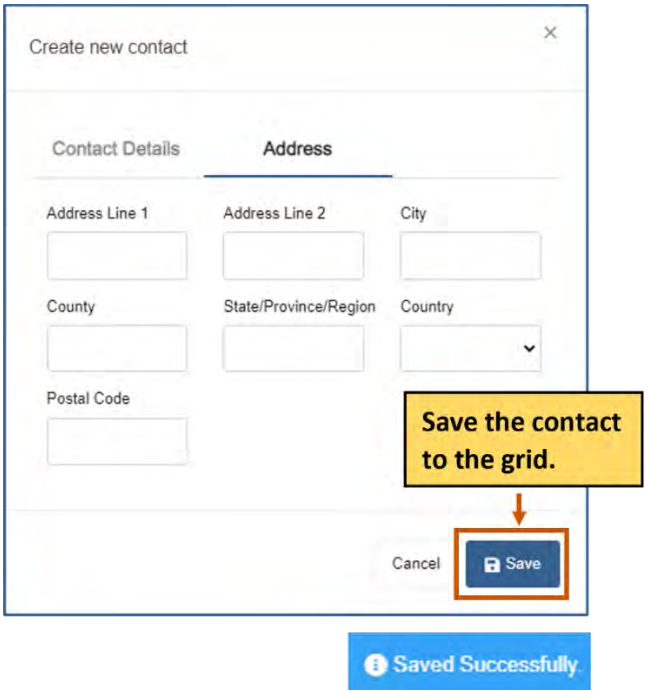



*Figure 90: Create New Contact – Address Tab*

## Edit a Contact

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

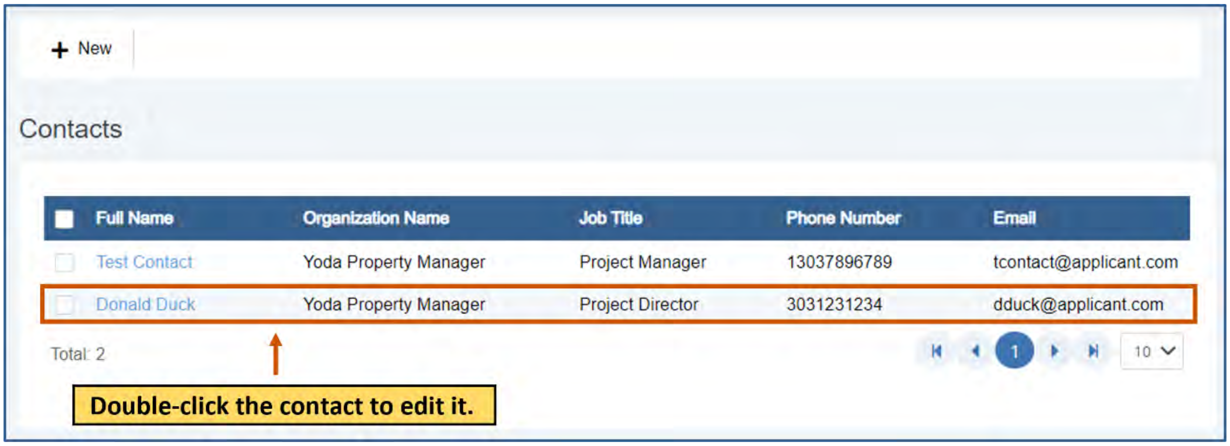



*Figure 91: Edit Contact*

2. Edit the necessary fields for each tab.
   ⓘ **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.

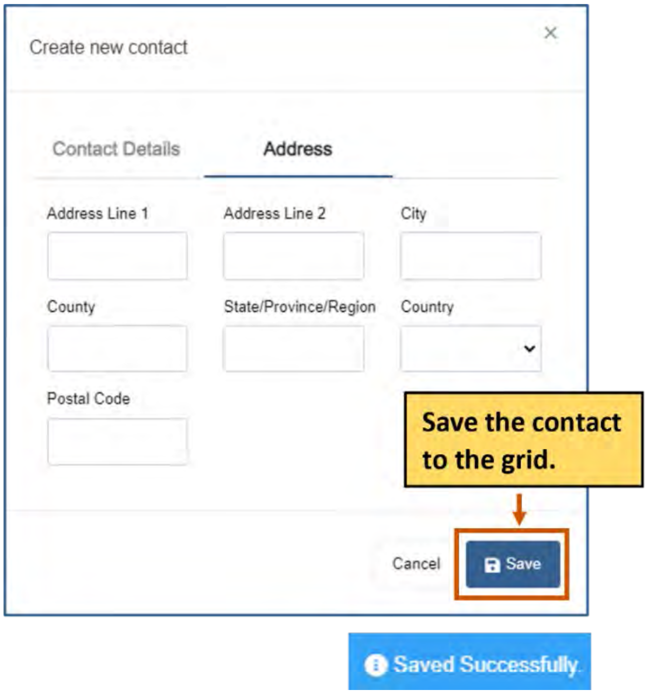



*Figure 92: Create New Contact – Address Tab*

## Delete a Contact

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

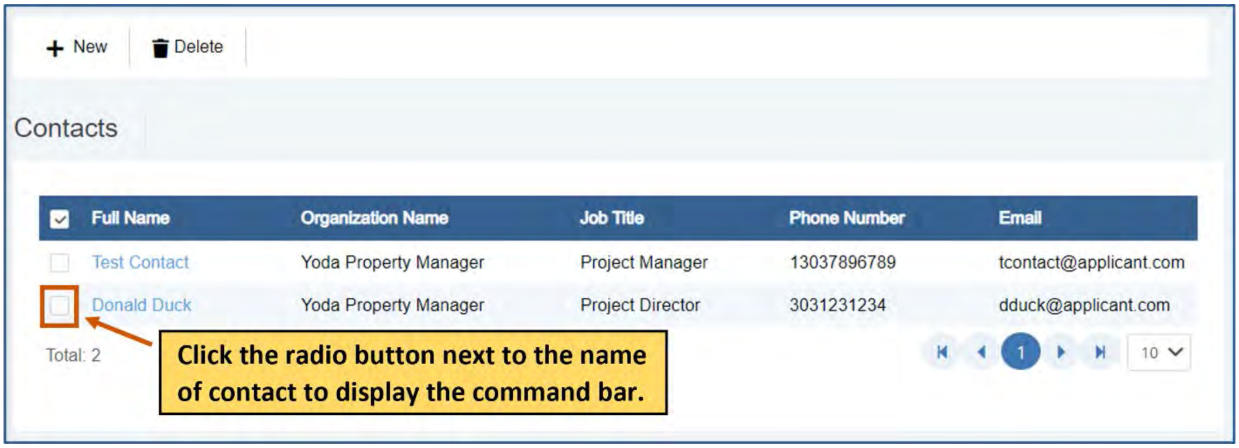



*Figure 93: Click Contact*

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

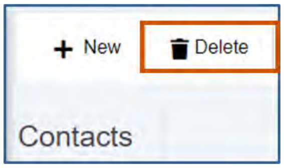



*Figure 94: Delete Contact*

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.

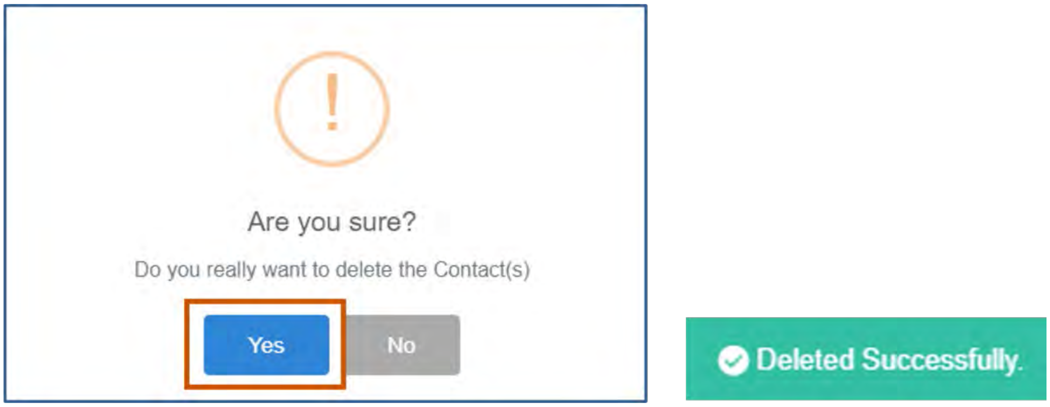



*Figure 95: Warning to Delete Contact*

# Documents

View documents related to the application.

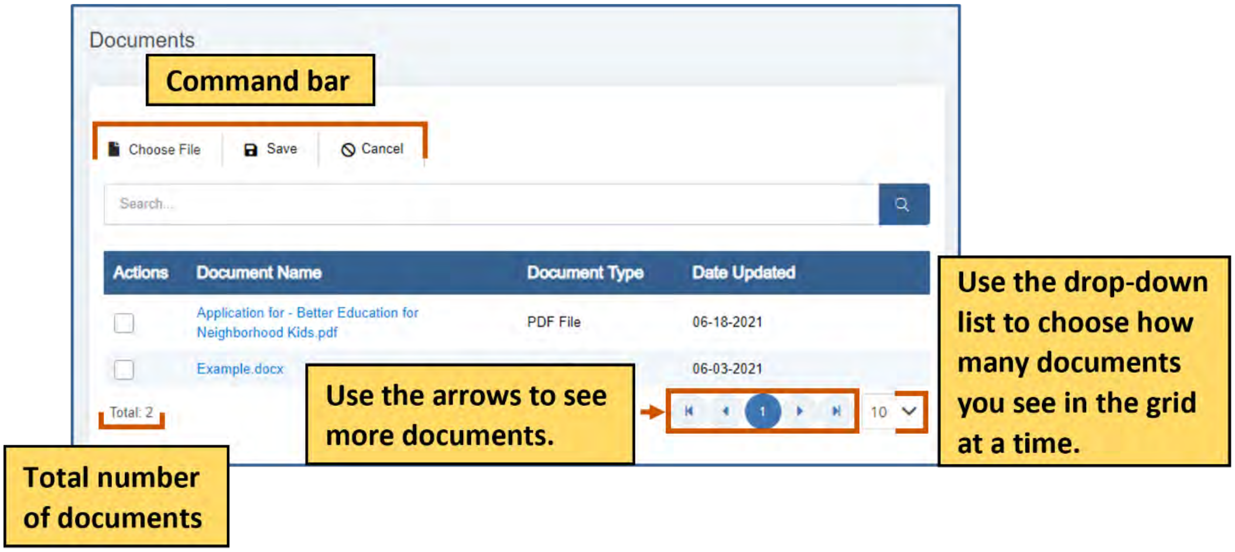



*Figure 96: Documents Screen*

| 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.

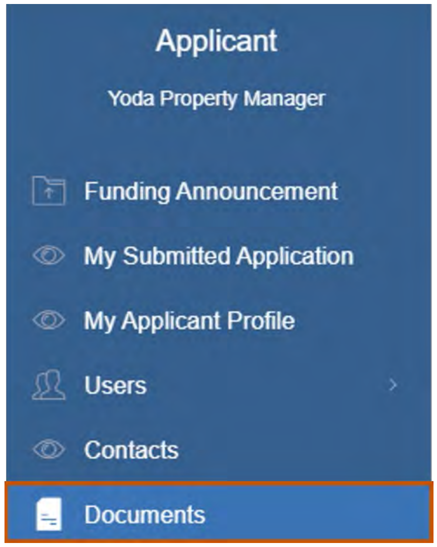



*Figure 97: Site Map - Documents*

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.

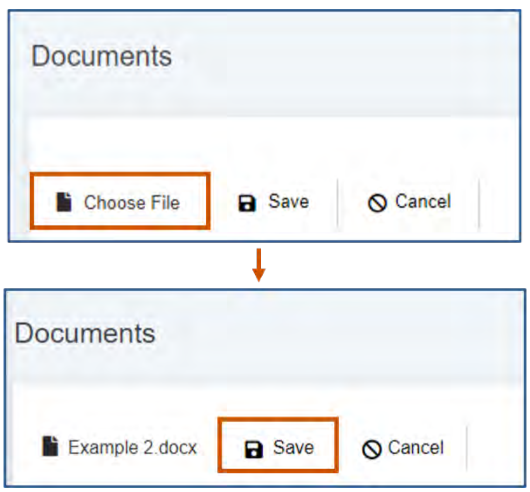



*Figure 98: Add Document*

## Delete a Document

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

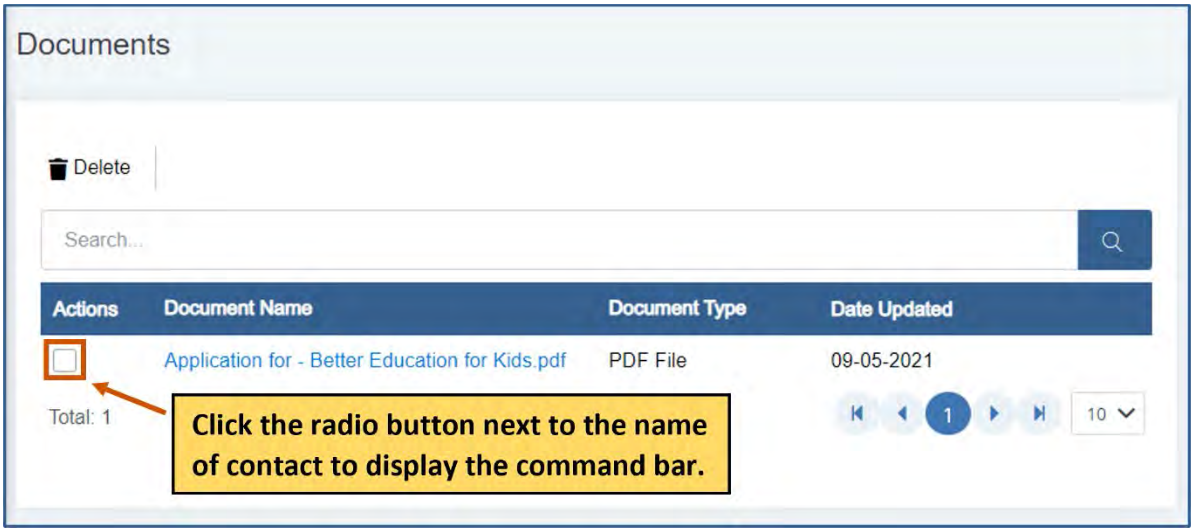



*Figure 99: Click Document*

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

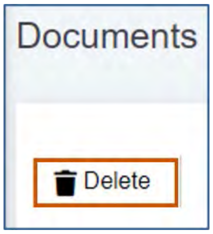



*Figure 100: Delete Document*

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.

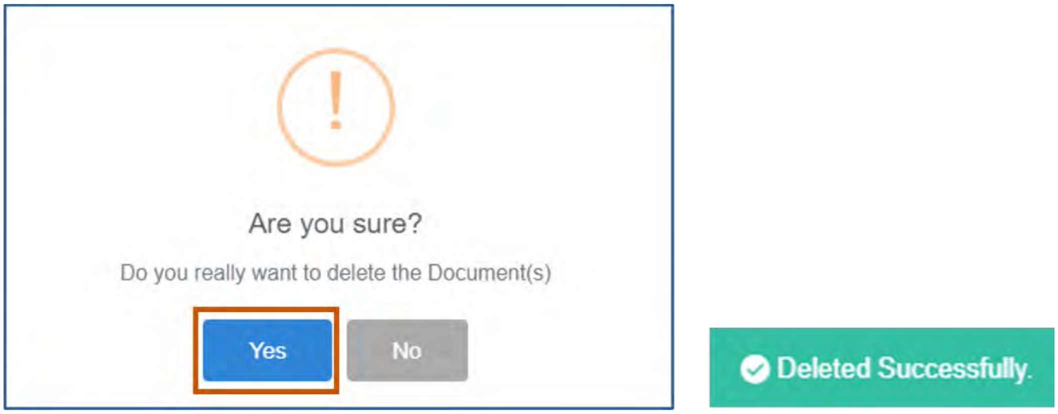



*Figure 101: Warning to Delete Document*

# 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.

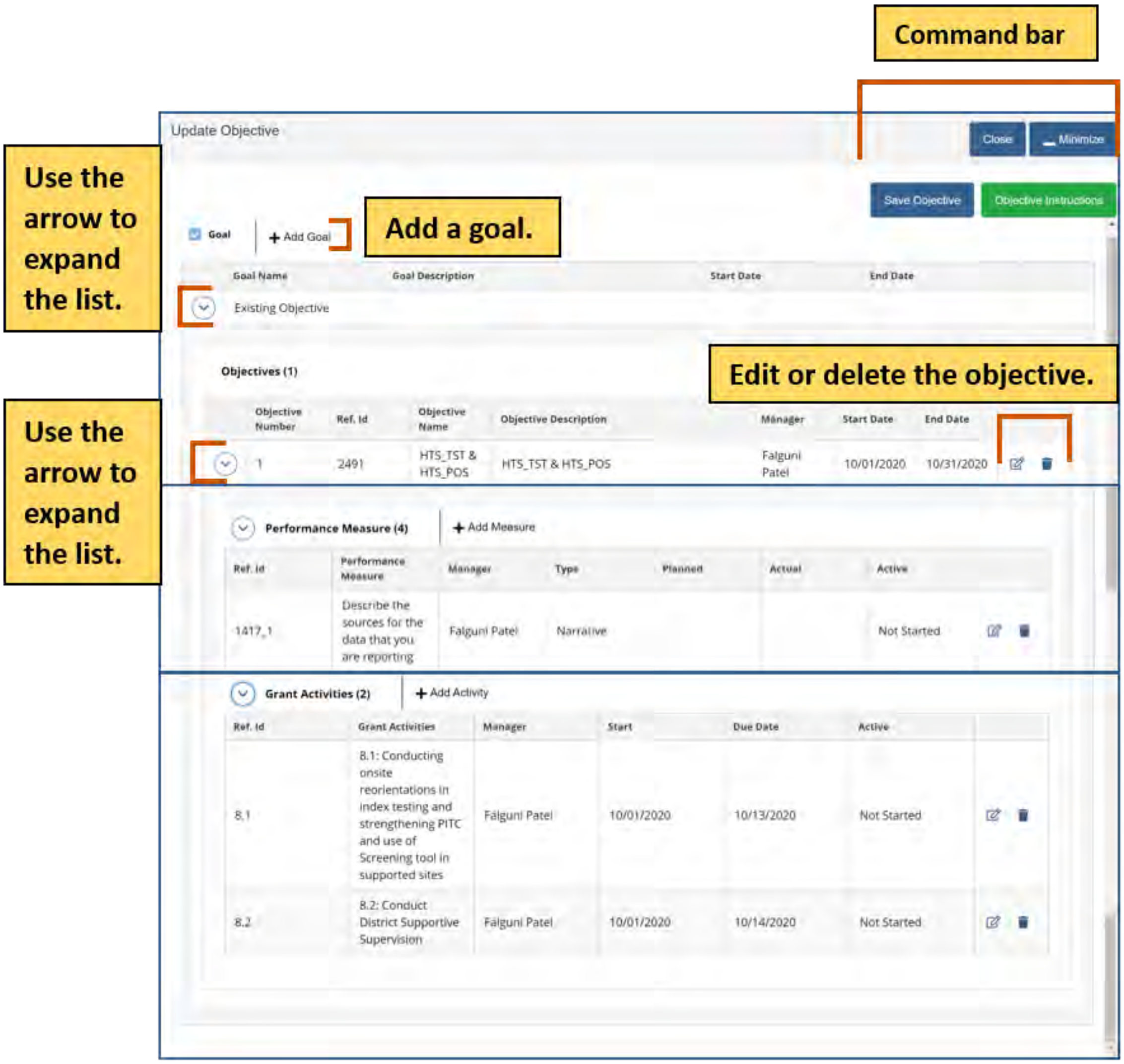



*Figure 102: Goals and Objectives*

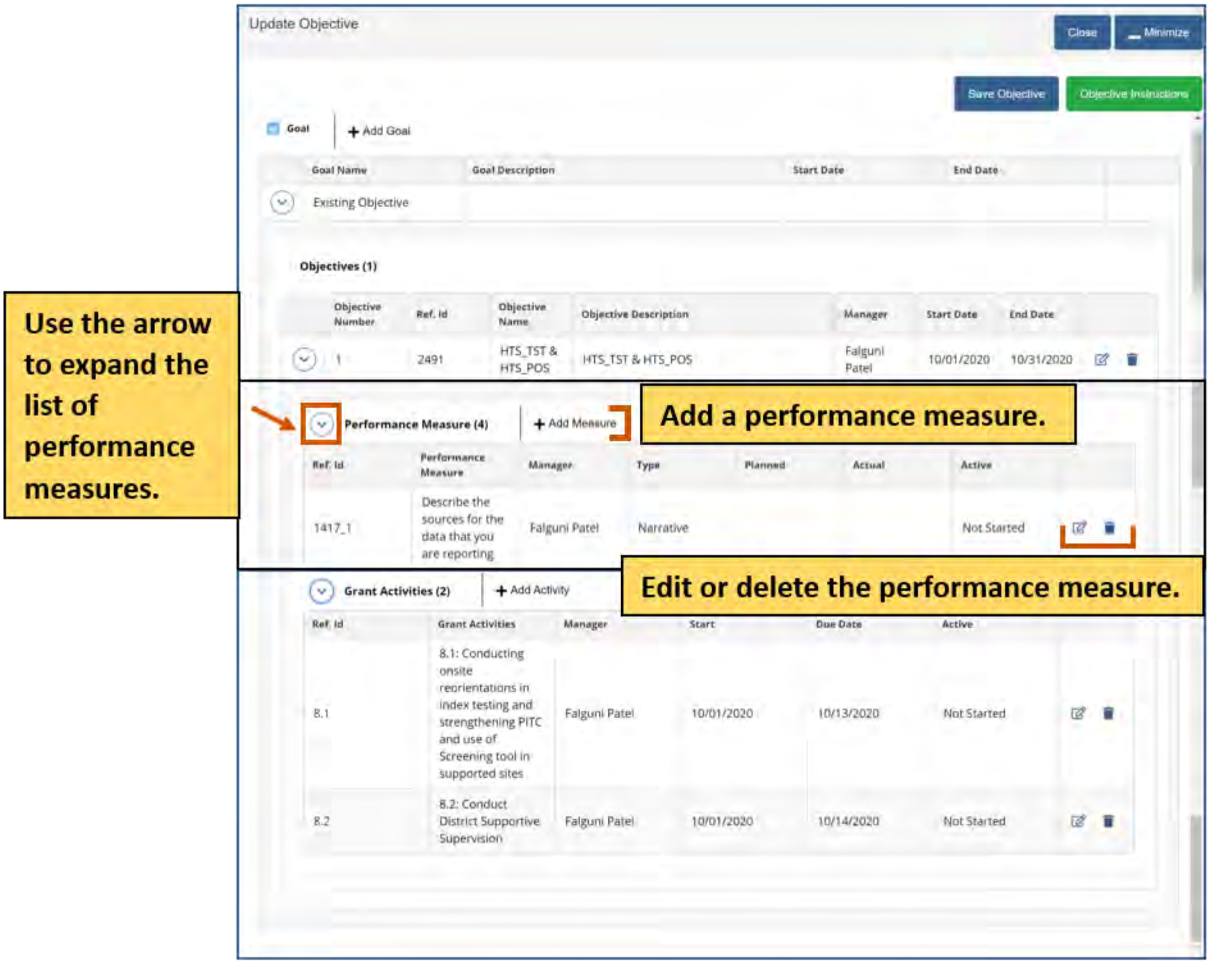



*Figure 103: Performance Measures*

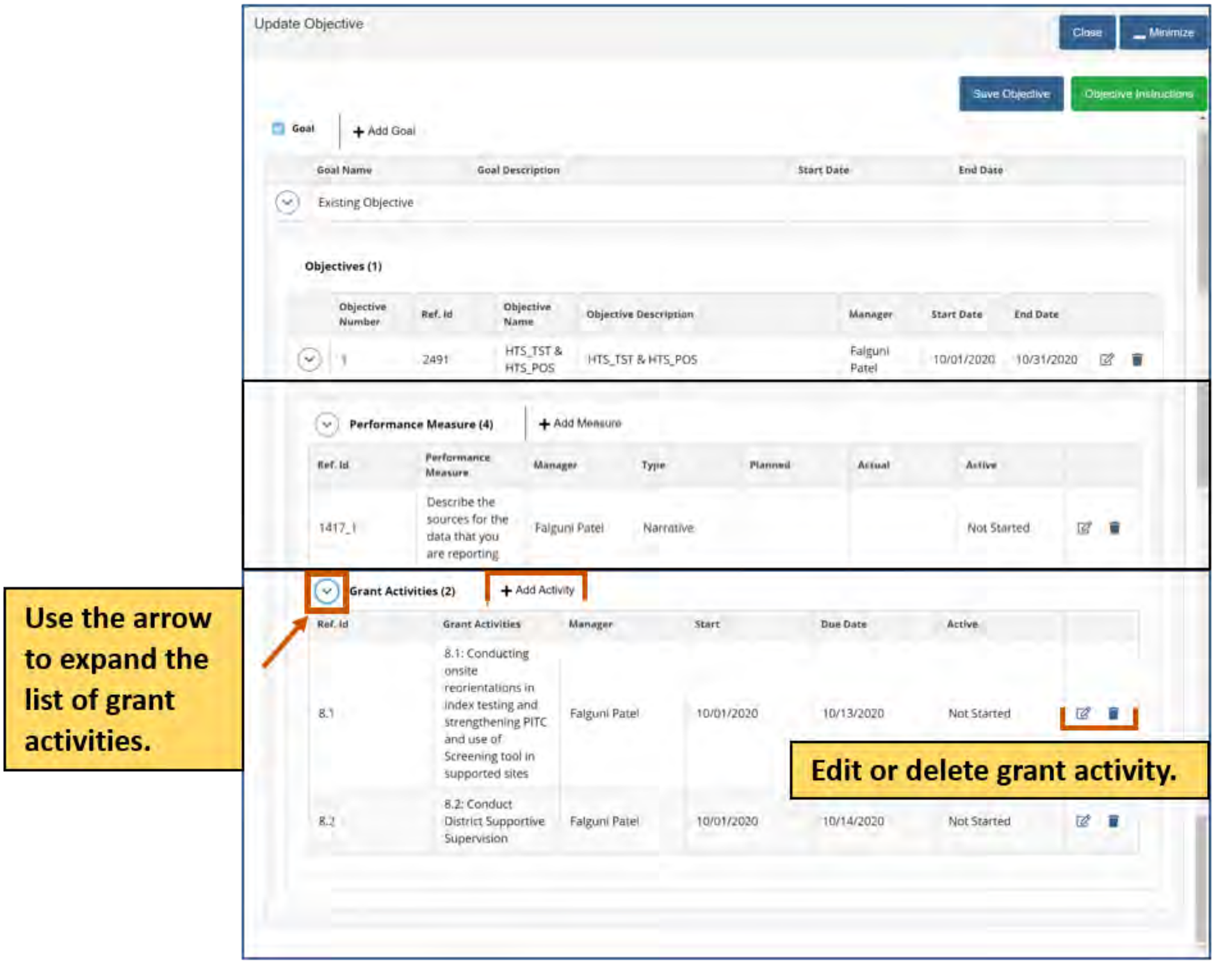



*Figure 104: Grant Activities*

# 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.
   **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.

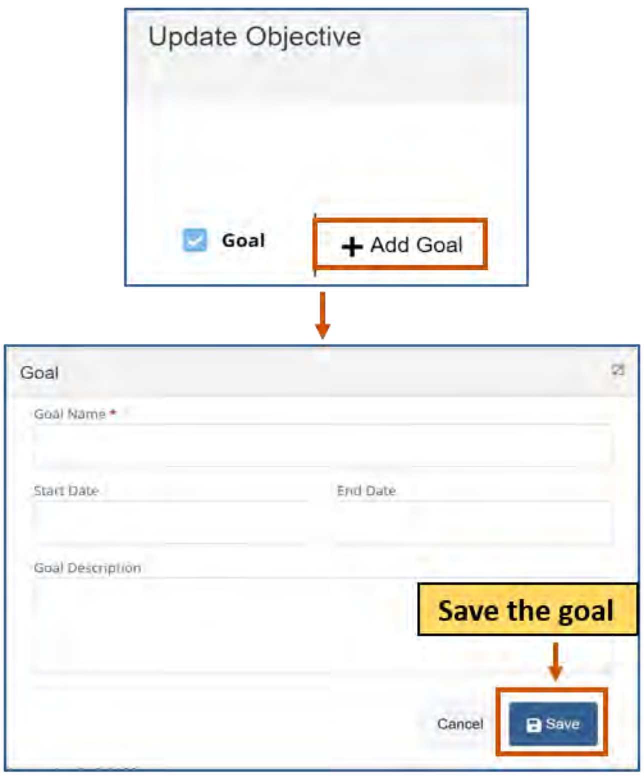



*Figure 106: Add Goal*

# 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.

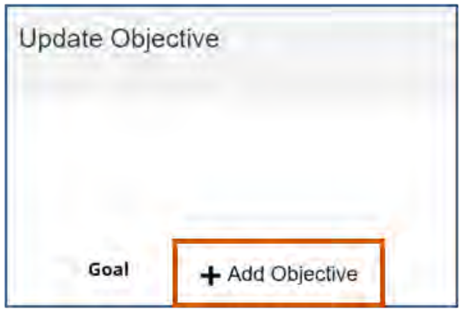



*Figure 107: Add Objective*

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.

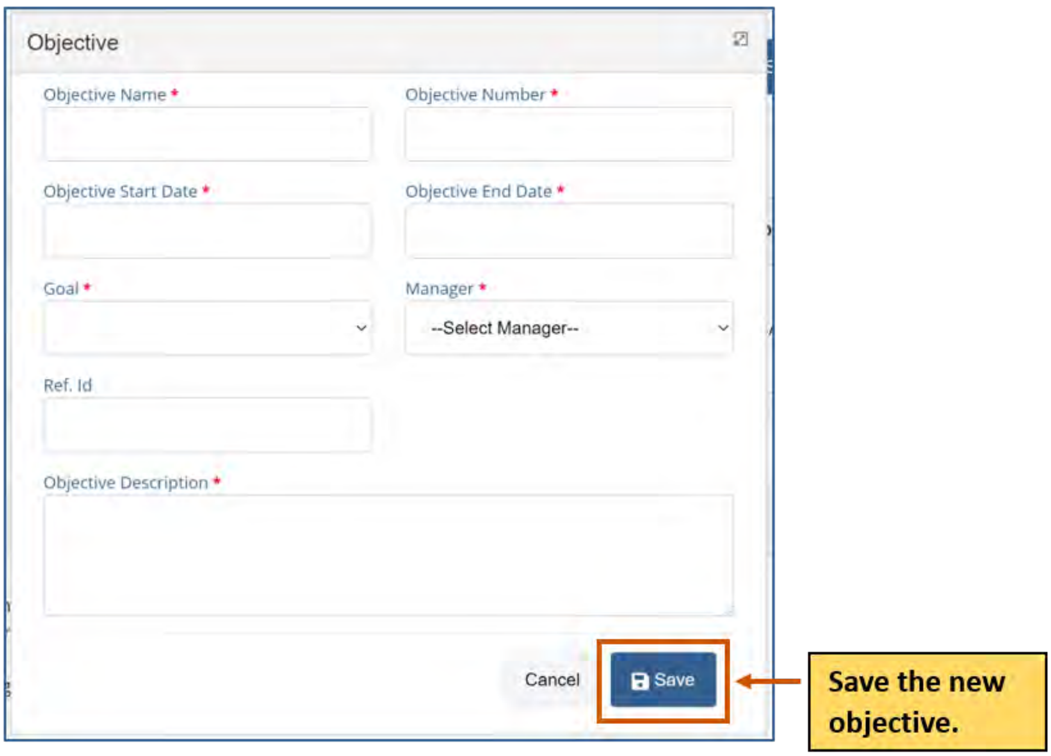



*Figure 108: Objective Dialog Box*

# 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.

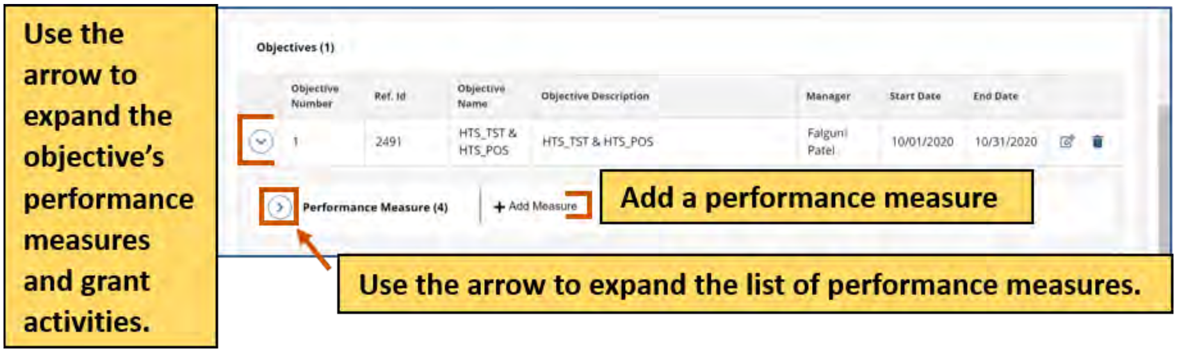



*Figure 109: Add Measure*

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.

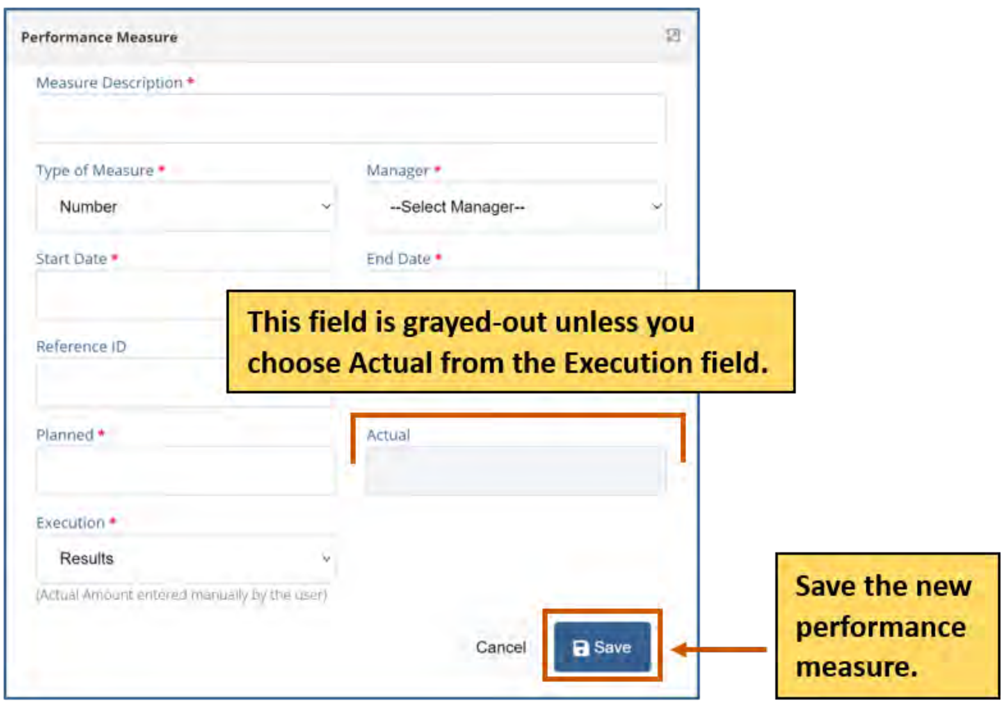



*Figure 110: Performance Measure Dialog Box*

# 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.

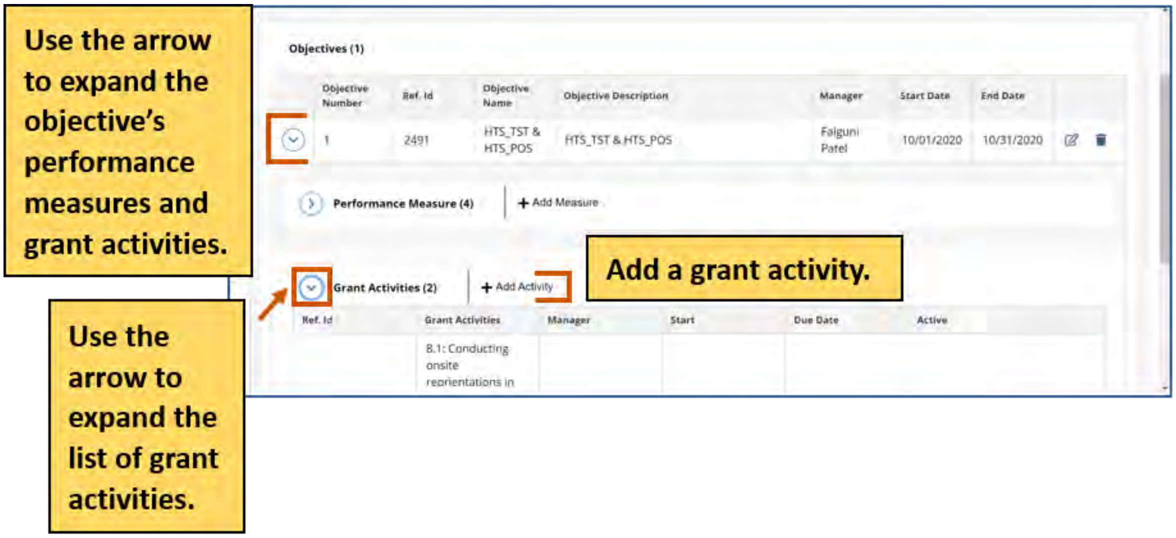



*Figure 111: Add Activity*

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.

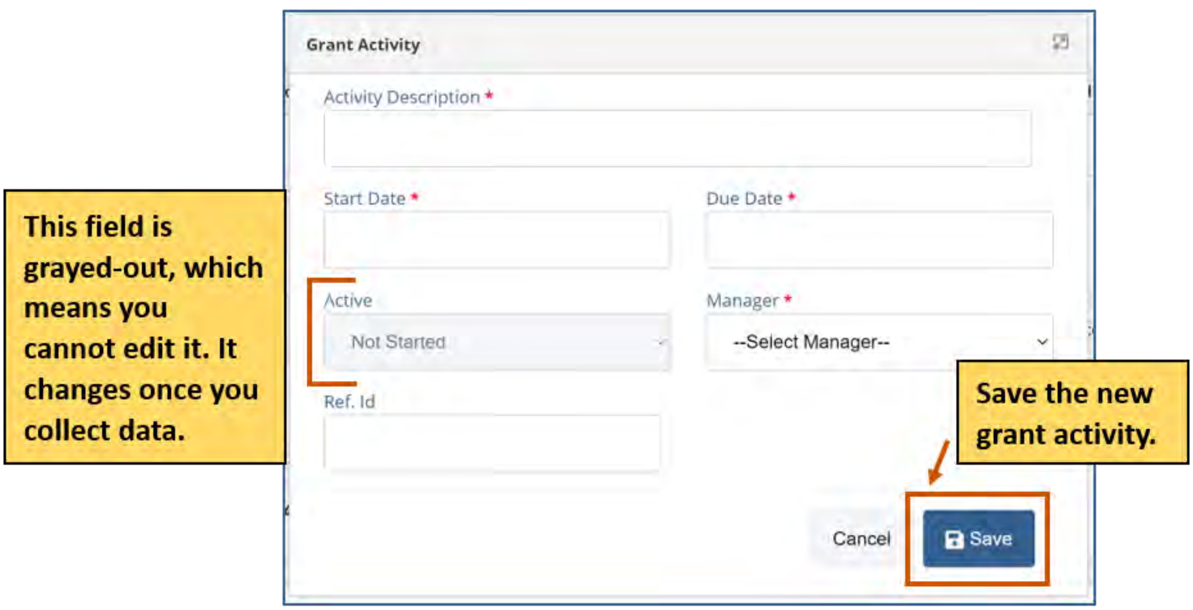



*Figure 112: Grant Activity Dialog Box*

# 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.

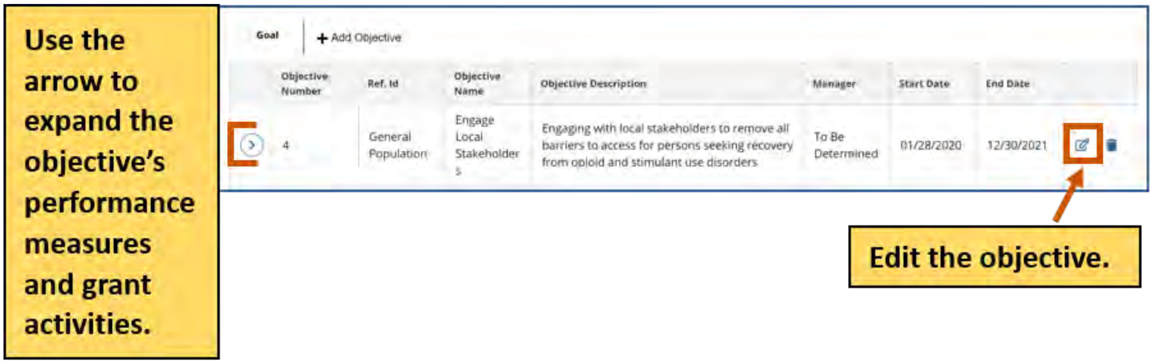



*Figure 113: Edit Objective*

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.

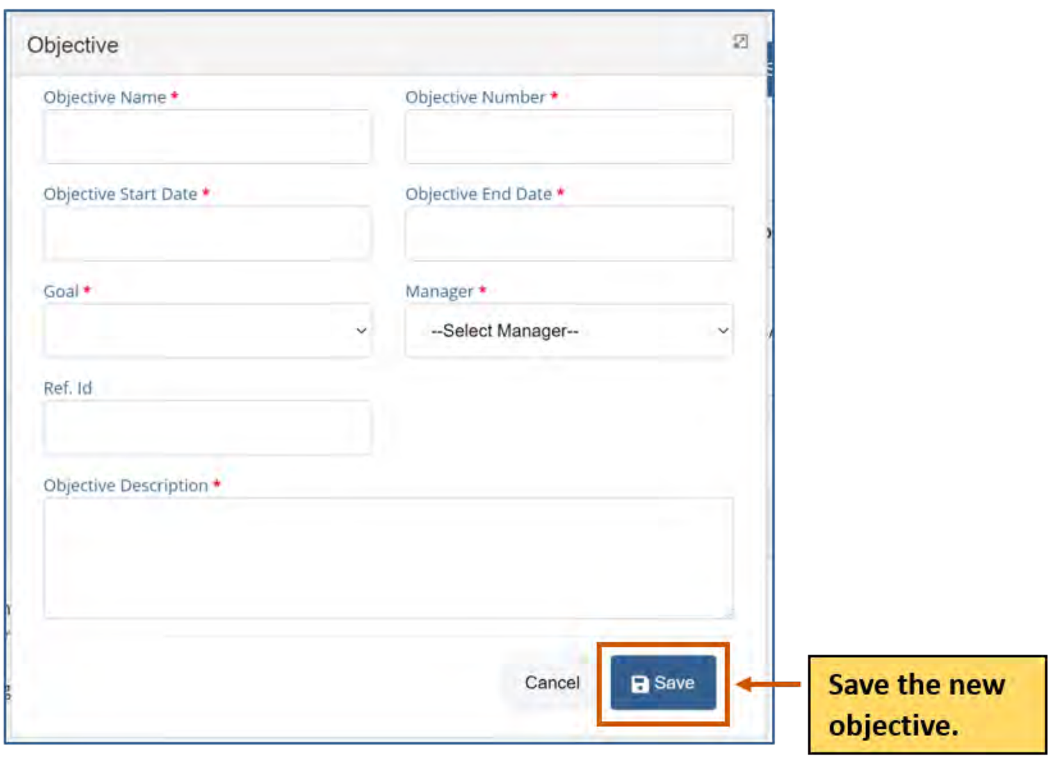



*Figure 114: Objective Dialog Box*

# 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.

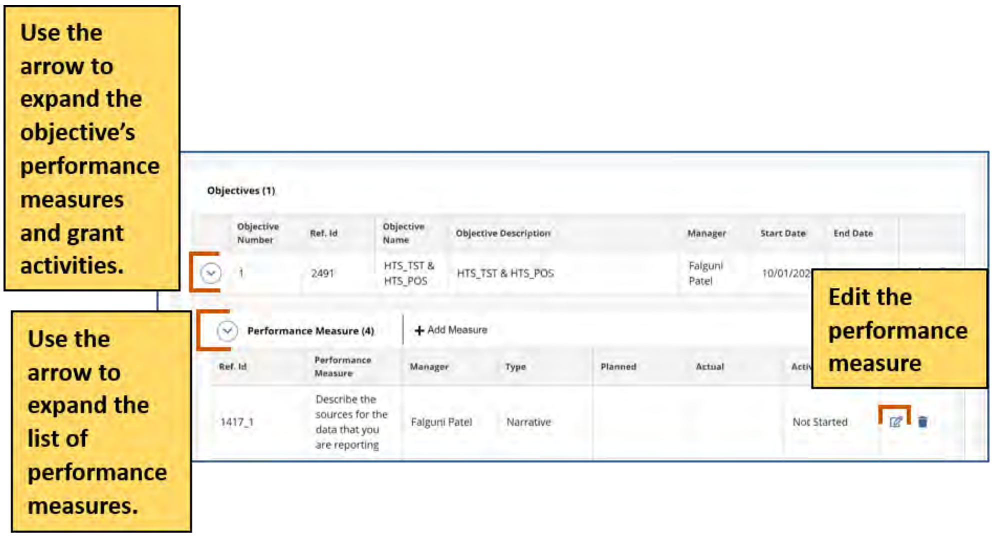



*Figure 115: Edit Performance Measure*

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.

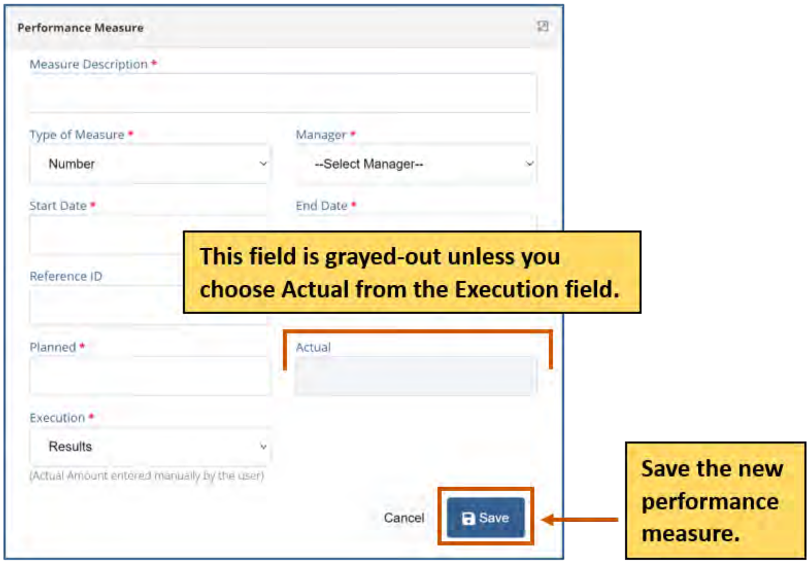



*Figure 116: Performance Measure Dialog Box*

# 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.

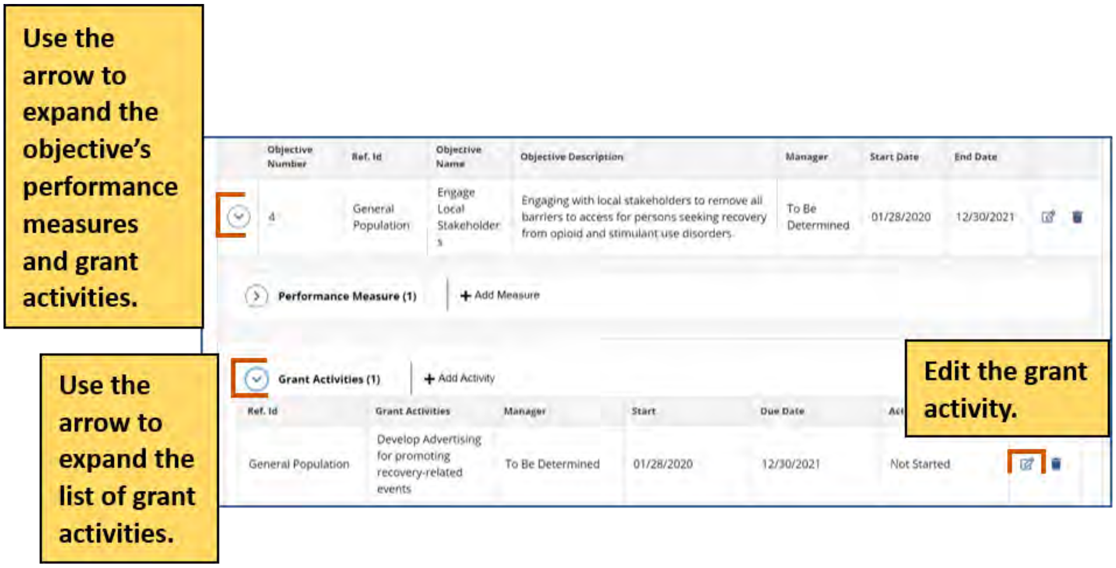



*Figure 117: Edit Grant Activity*

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.

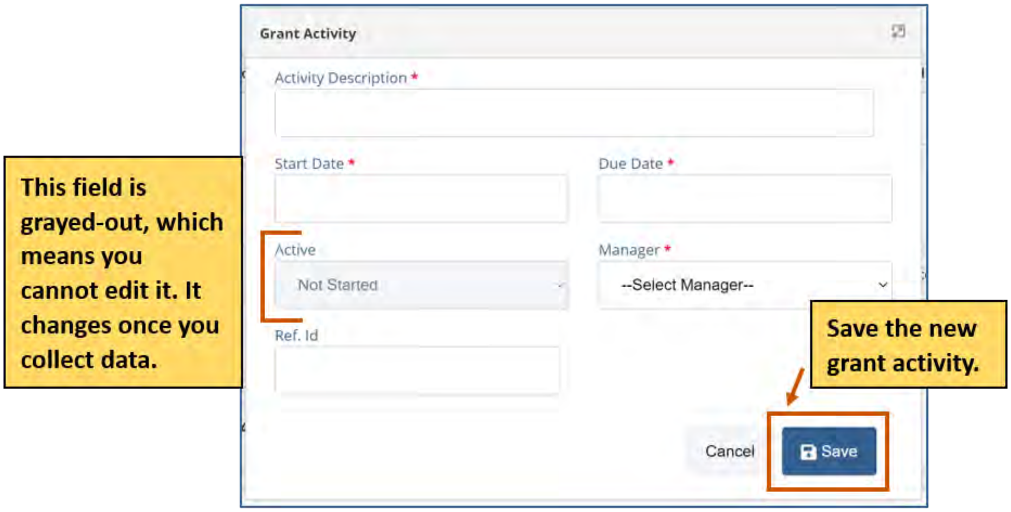



*Figure 118: Grant Activity Dialog Box*

# 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.

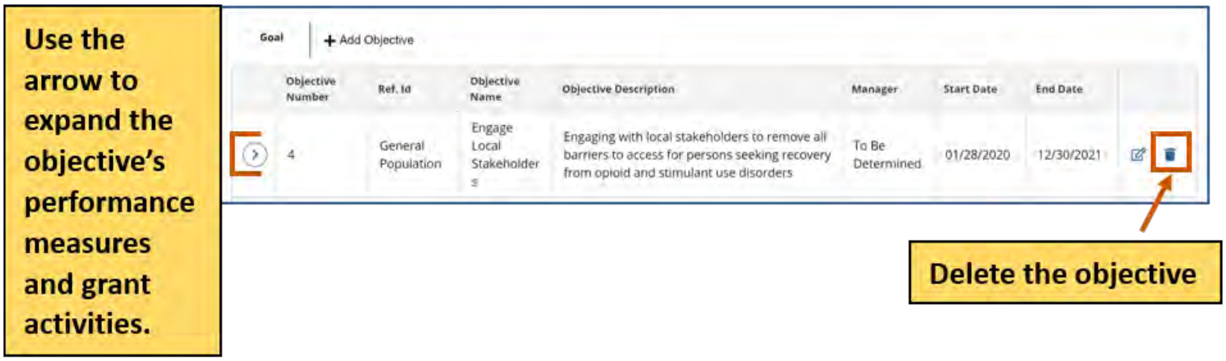



*Figure 119: Delete Objective*

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

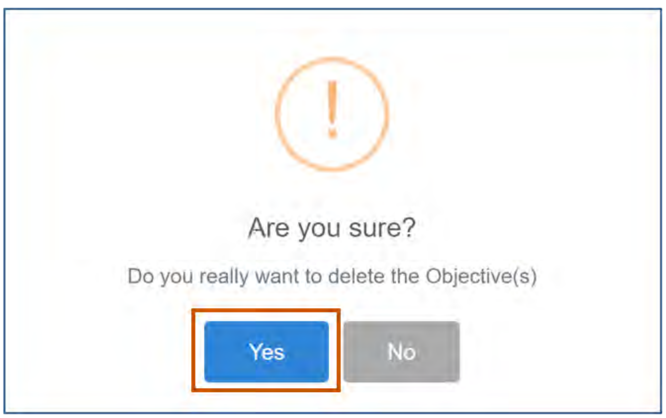



*Figure 120: Warning to Delete Objective*

# 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.

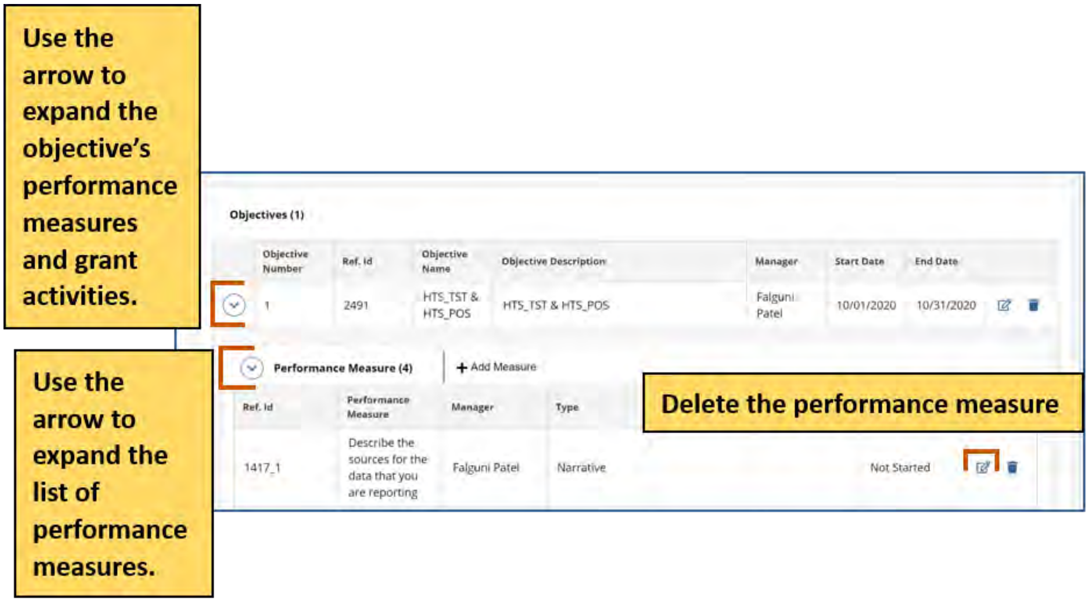



*Figure 121: Delete Performance Measure*

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

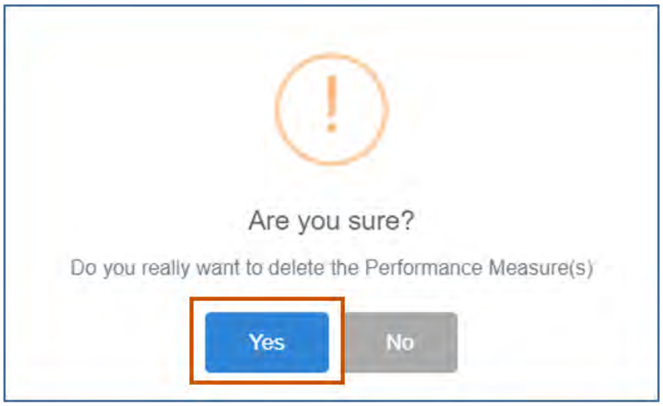



*Figure 122: Warning to Delete Performance Measure*

# 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.

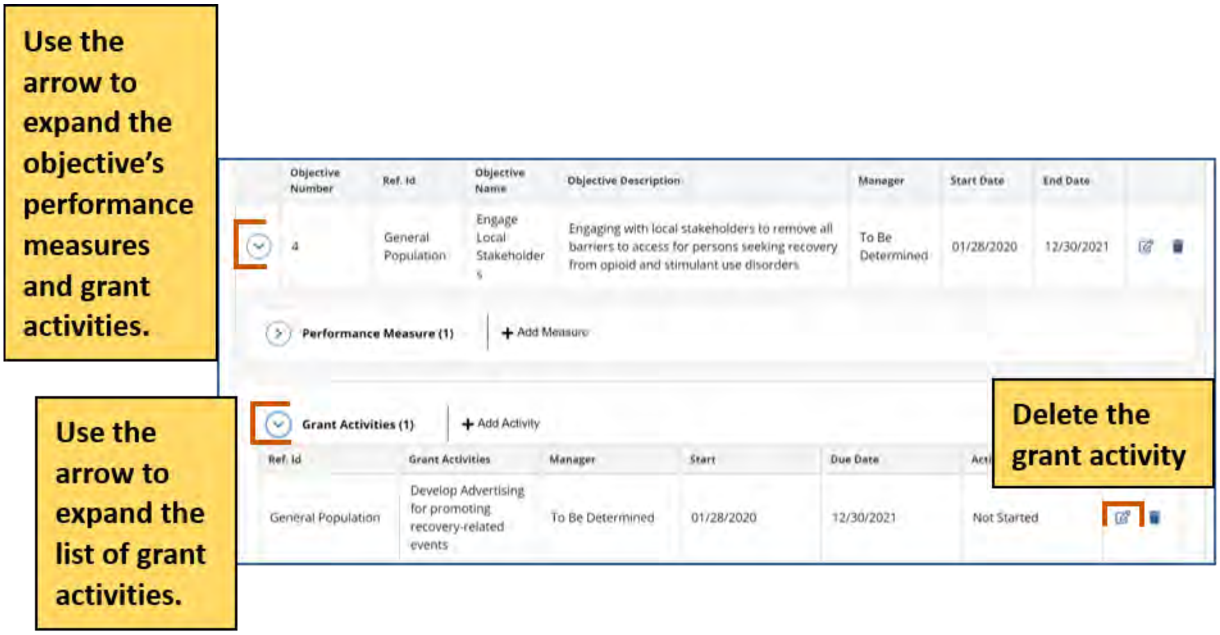



*Figure 123: Delete Grant Activity*

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

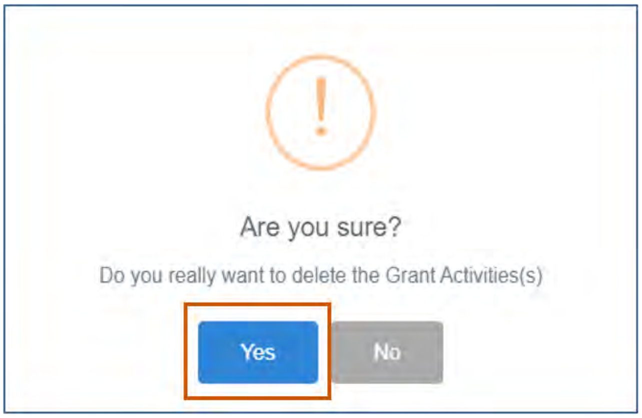



*Figure 124: Warning to Delete Grant Activity*

# Budget Tools

ⓘ **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.

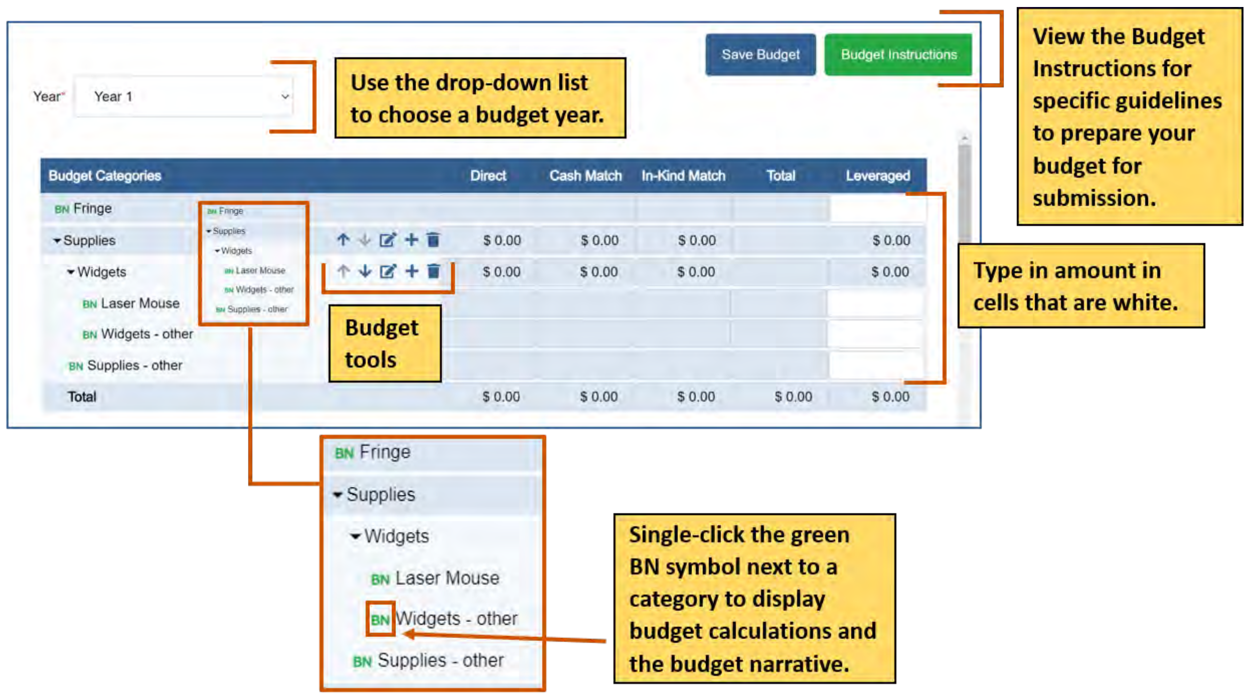



Figure 125: Budget Tools

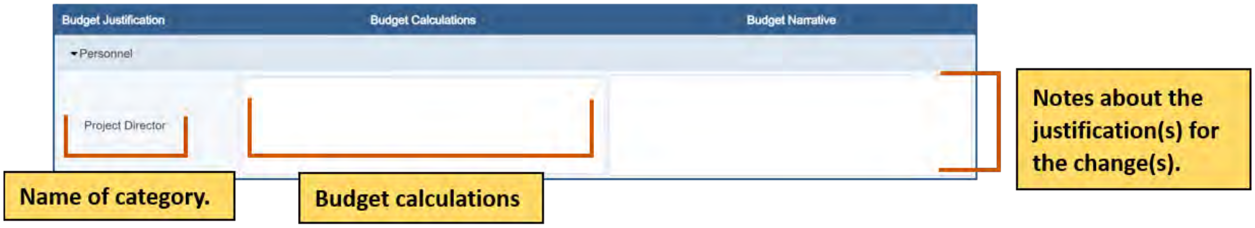



Figure 126: View Budget Calculations

# 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.

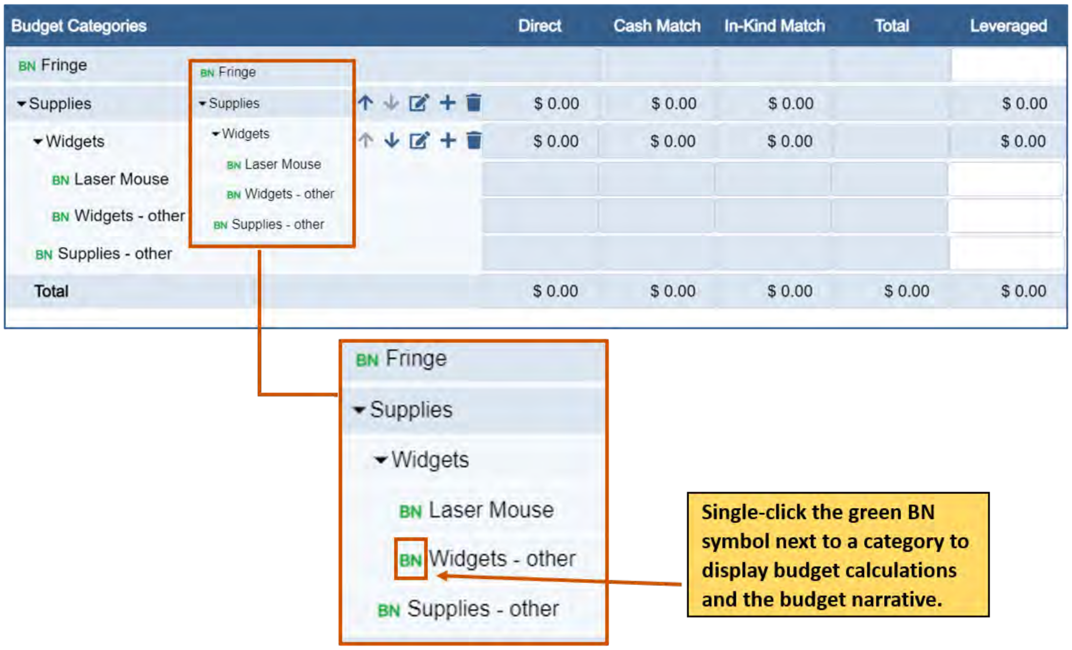



*Figure 127: Add Budget Calculations and Narrative*

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

Example dialog box

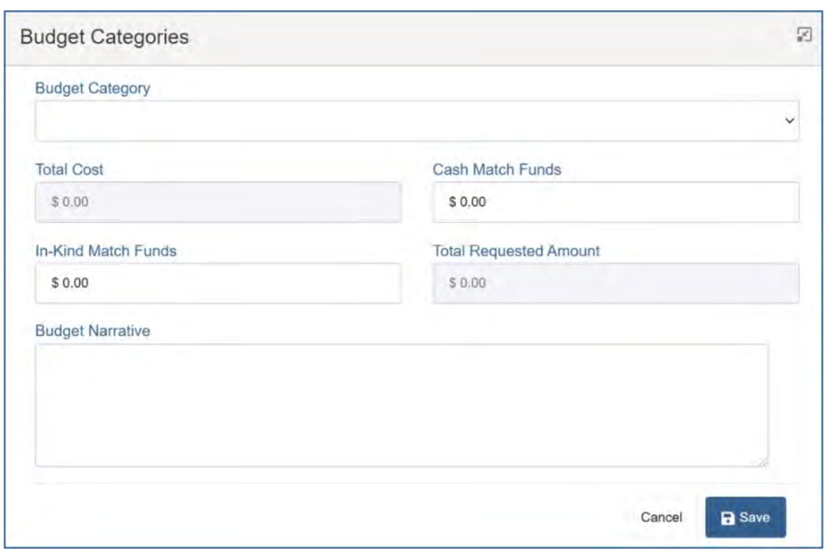



*Figure 128: Budget Categories Dialog Box*

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.


*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.**

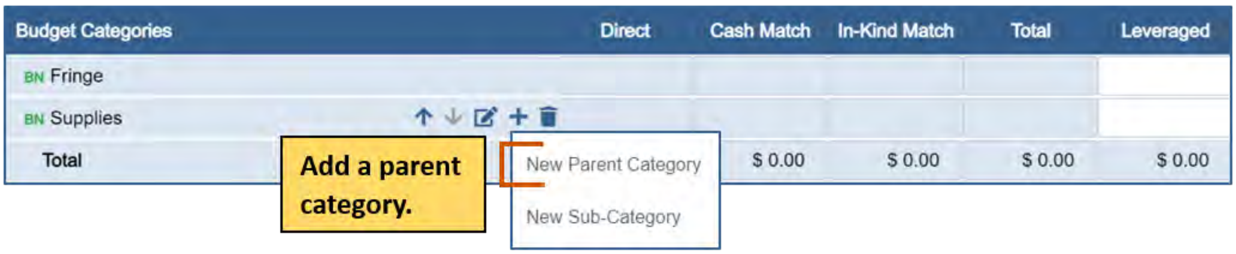



*Figure 130: Add Parent Category*

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.

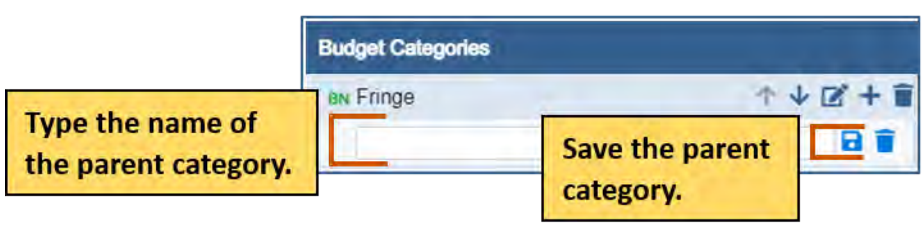



*Figure 133: Save Parent Category*

# 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.

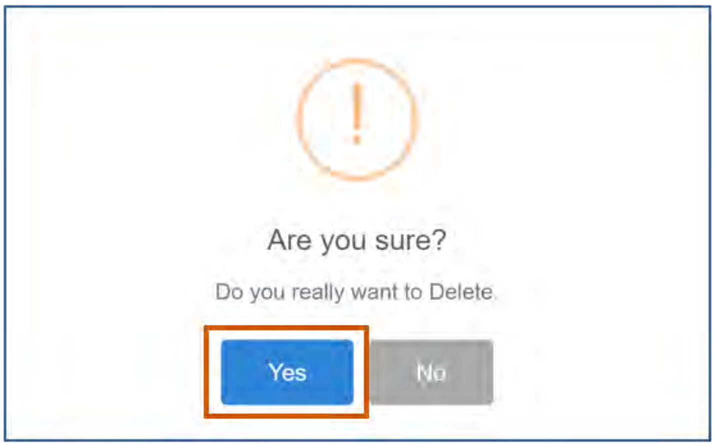



*Figure 135: Warning to Delete Category*

# 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.

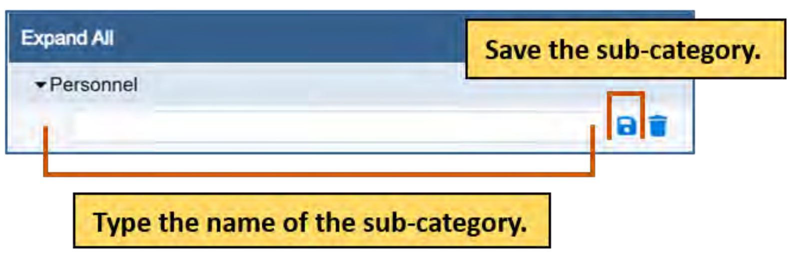



*Figure 137: Save Sub-Category*

# 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** .

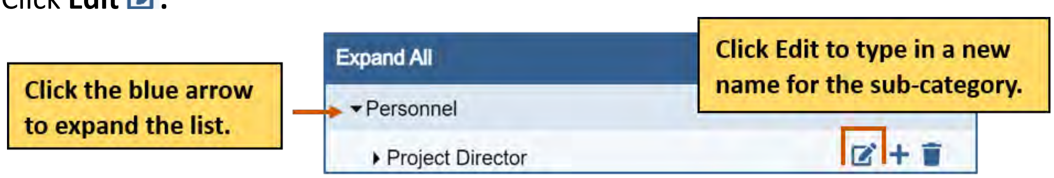



*Figure 138: Edit Sub-Category*

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

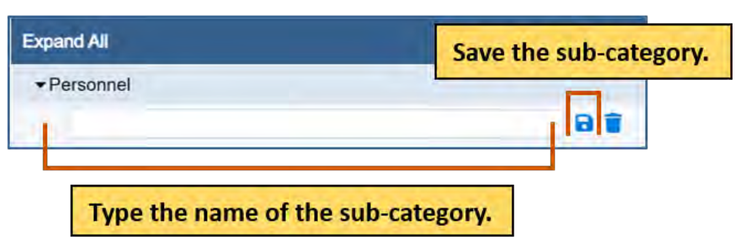



*Figure 139: Save Sub-Category*

# 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.

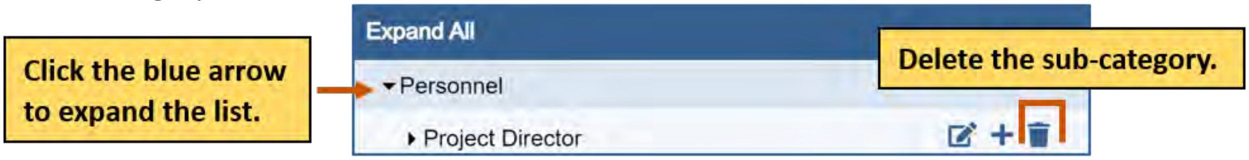



*Figure 140: Delete Sub-Category*

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

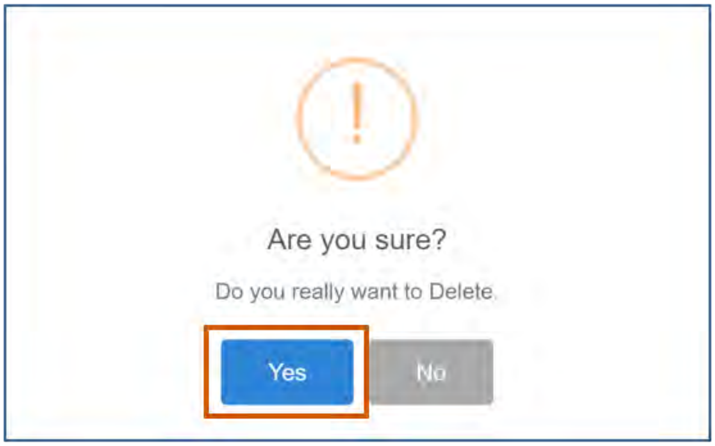



*Figure 141: Warning to Delete Category*

# 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.

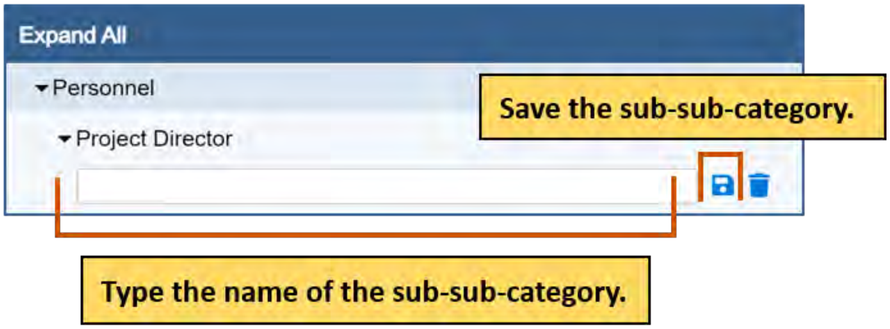



*Figure 143: Save Sub-Sub-Category*

# 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** .

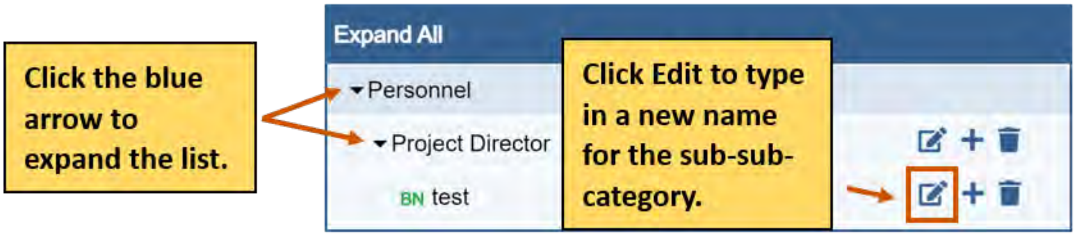



*Figure 144: Edit Sub-Sub-Category*

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

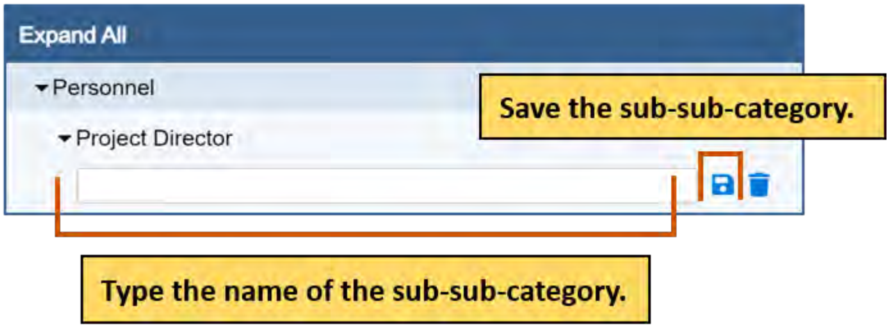



*Figure 145: Save Sub-Sub-Category*

# 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.

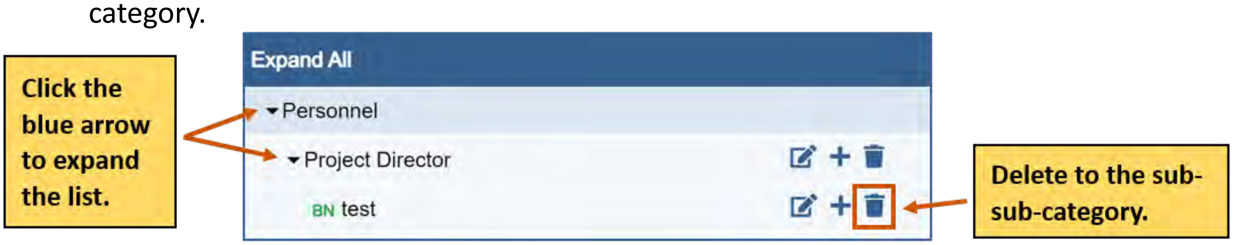



*Figure 146: Delete Sub-Sub-Category*

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

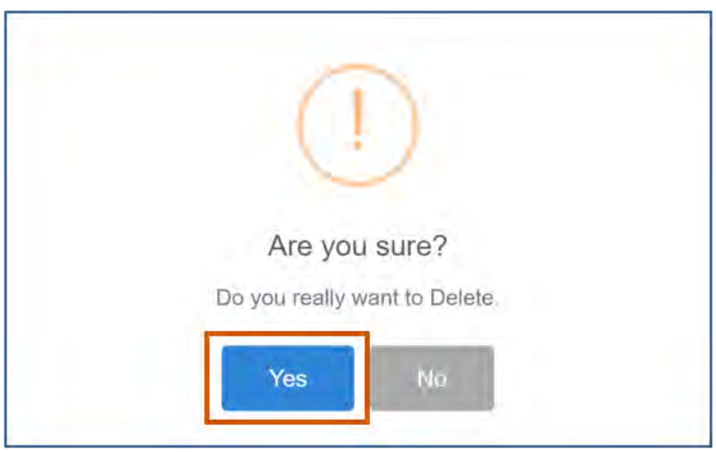



*Figure 147: Warning to Delete Category*

# 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.

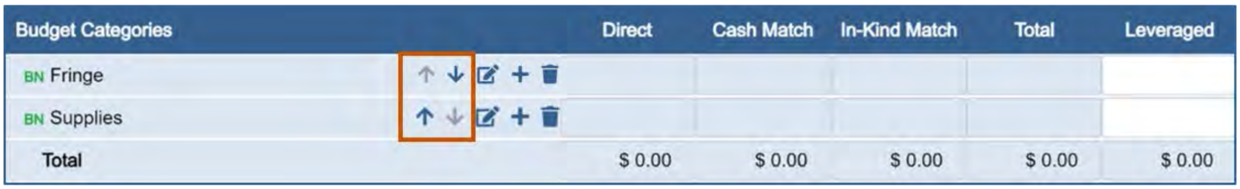



*Figure 148: Category Commands*