

GrantVantage®



Applicant Instructions

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Login

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

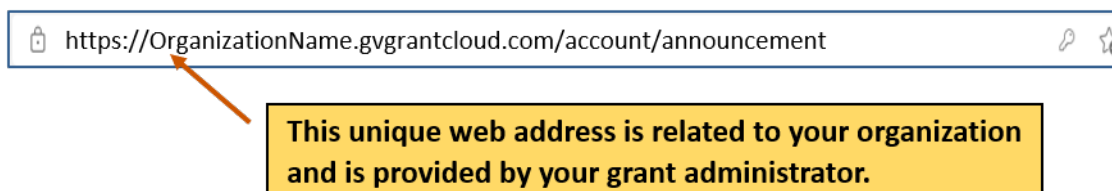


Figure 1: GrantVantage URL

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

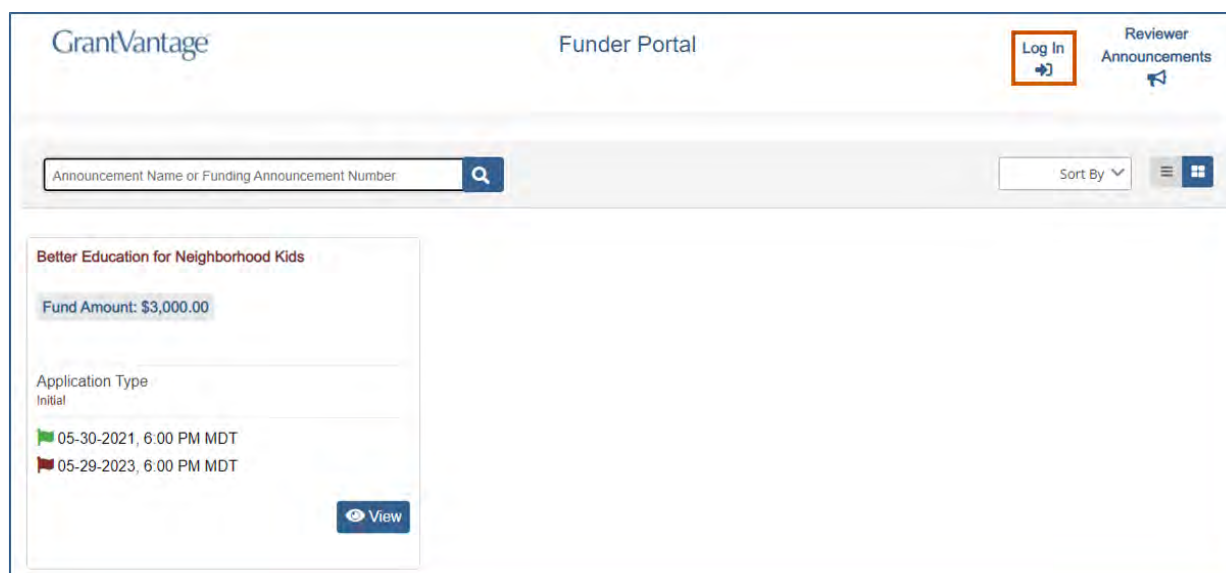
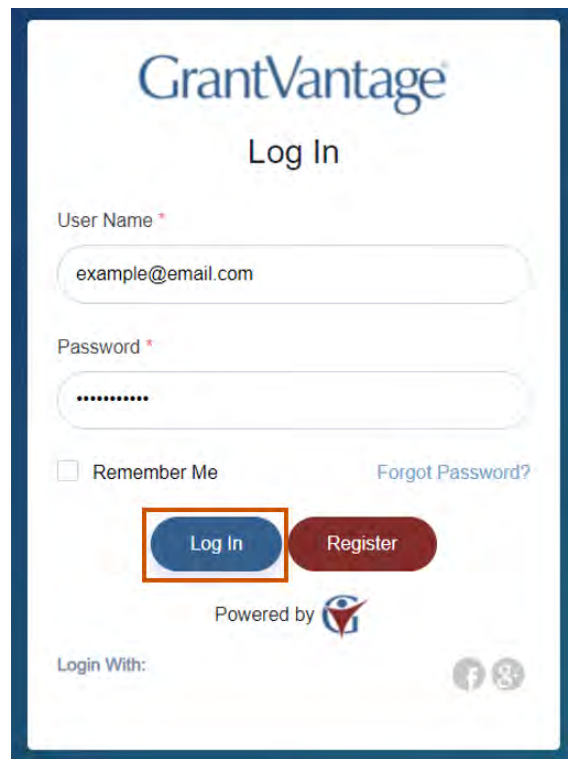


Figure 2: Public Facing Page

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



The image shows a login screen for GrantVantage. At the top is the GrantVantage logo. Below it is the text "Log In". There are two input fields: "User Name *" with the example "example@email.com" and "Password *" with masked characters. Below the password field is a "Remember Me" checkbox and a "Forgot Password?" link. There are two buttons: "Log In" (blue) and "Register" (red). The "Log In" button is highlighted with a red rectangle. Below the buttons is a "Powered by" logo. At the bottom left is "Login With:" and at the bottom right are Facebook and Google+ icons.

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.

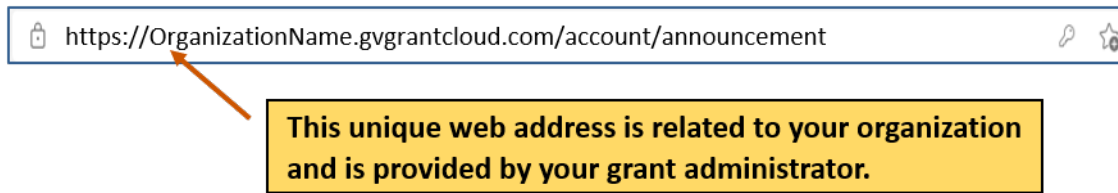


Figure 4: GrantVantage URL

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

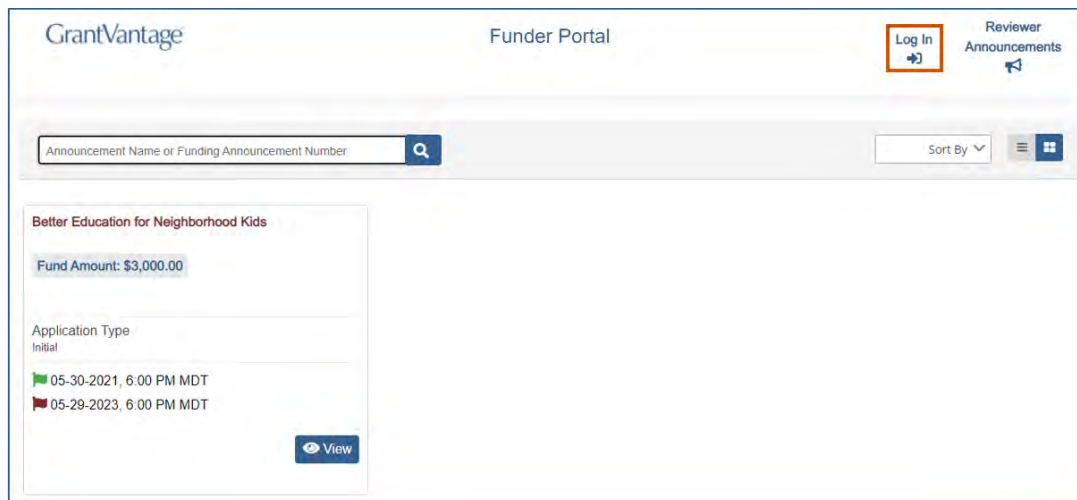
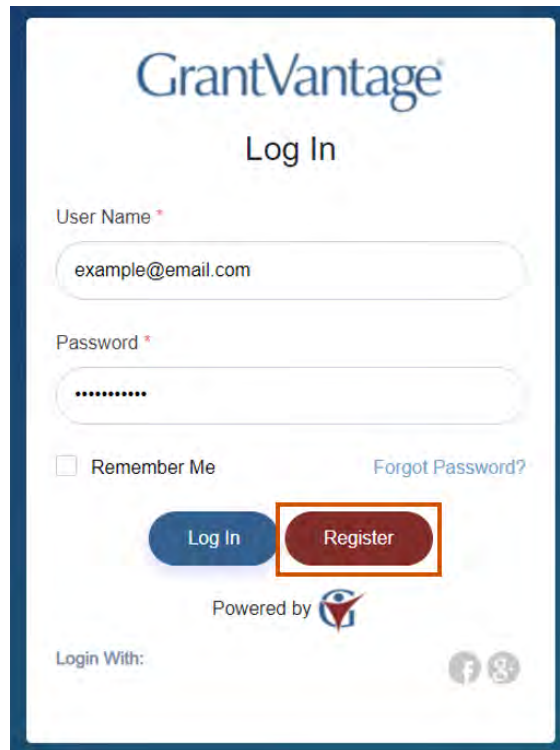



Figure 5: Public Facing Page

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

The image shows a web form for GrantVantage. At the top is the GrantVantage logo. Below it is the text "Log In". There are two input fields: "User Name *" with the example email "example@email.com" and "Password *" with masked characters. Below the password field is a checkbox for "Remember Me" and a link for "Forgot Password?". At the bottom of the form are two buttons: "Log In" (blue) and "Register" (red, highlighted with a red box). Below the buttons is the text "Powered by" followed by a logo. At the very bottom, it says "Login With:" followed by Facebook and Google+ icons.*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

Organization *

This field is required.

Organization Type *

First Name *

Last Name *

Email Address *

User Name *


This field is required.

Password

Password (repeat)

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.

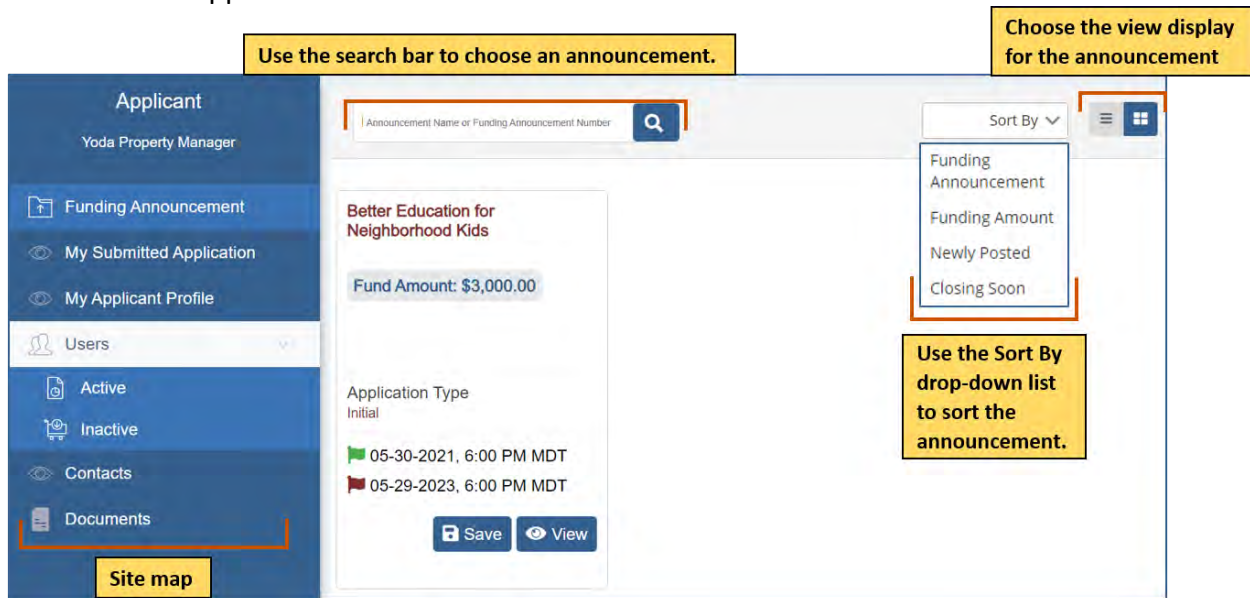


Figure 8: Homepage Screen 1

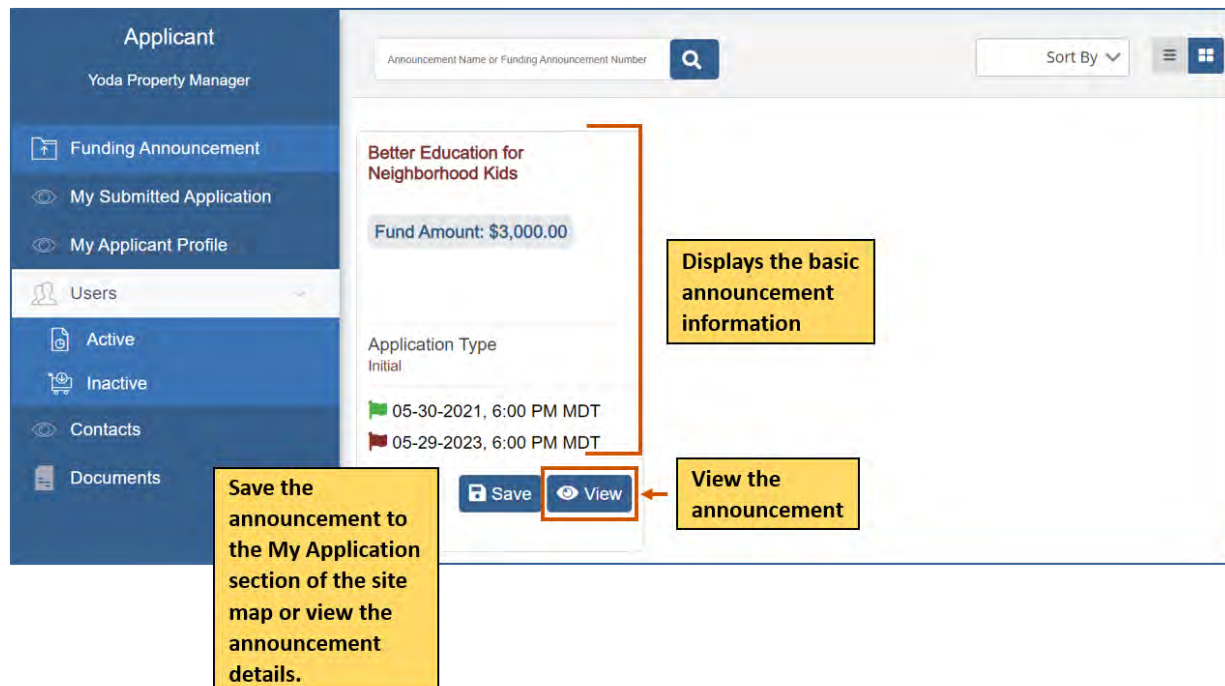


Figure 9: Homepage Screen 2

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	Active 	View the active users related to the application.
 Inactive	Inactive 	View the active users related to the application.
 Contacts	Contacts 	View the contacts related to the application.
 Documents	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

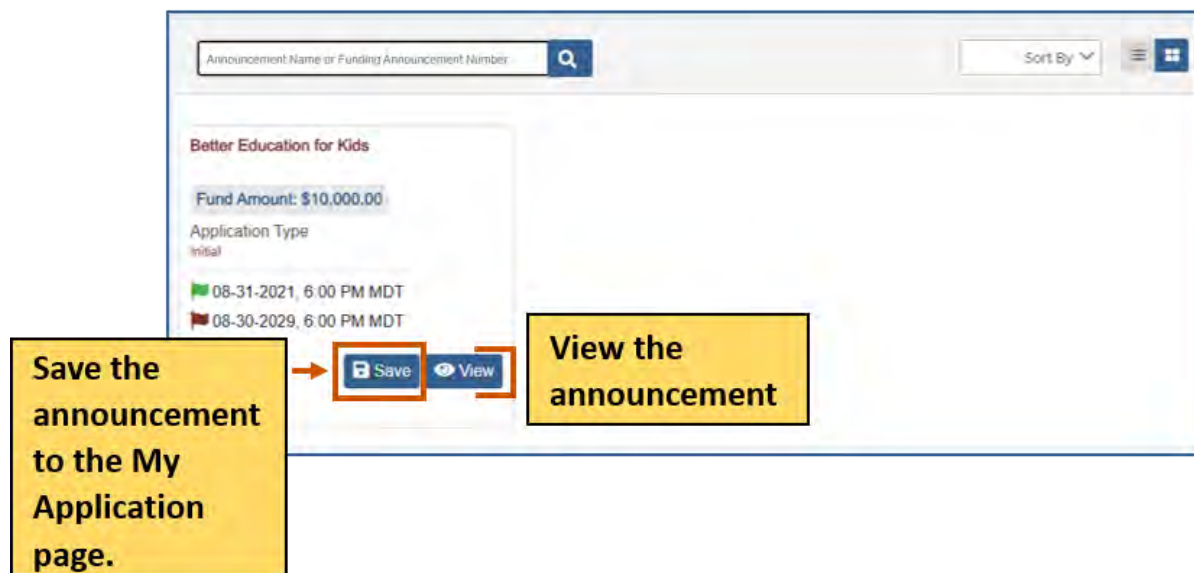



Figure 11: Funding Announcement Screen 2

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.

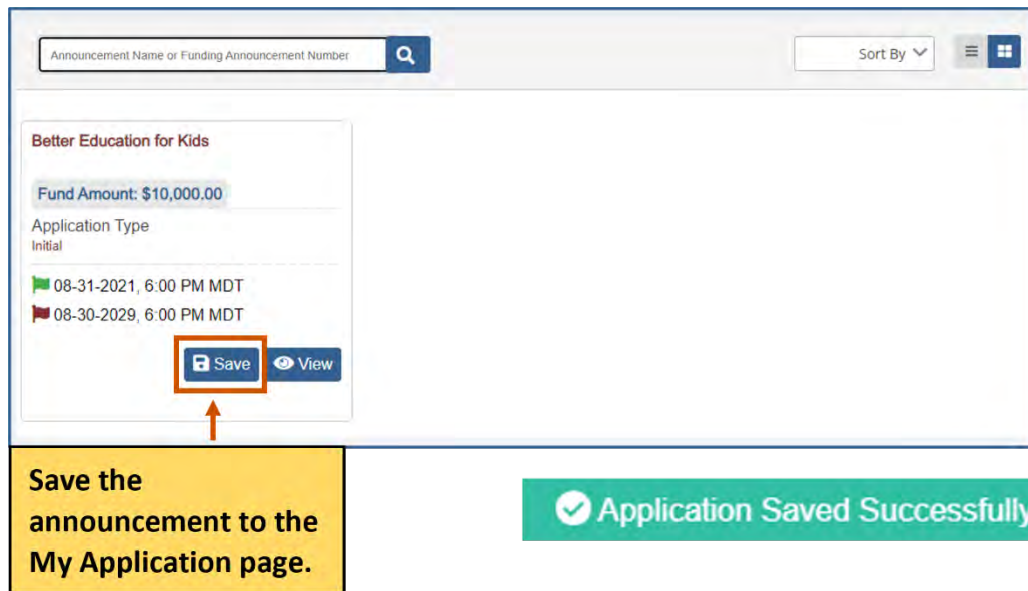


Figure 13: Save Announcement

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.

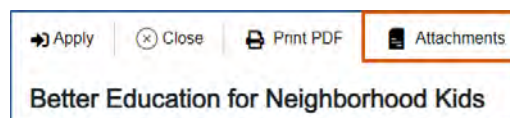


Figure 15: View Attachments

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

Or

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

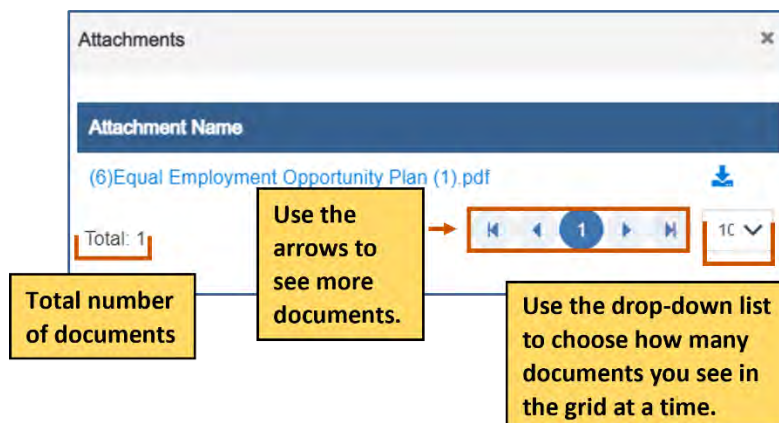


Figure 16: Attachments Dialog Box 1

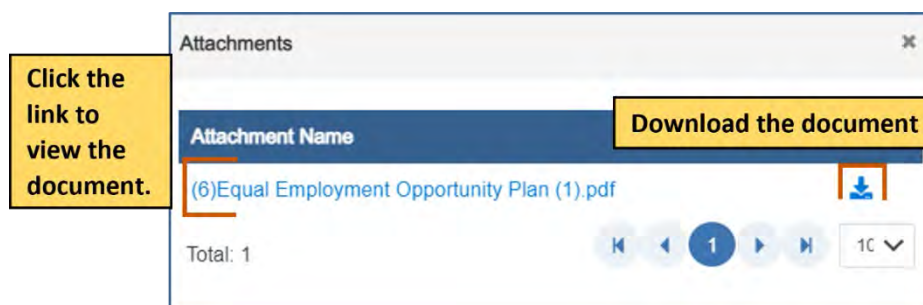



Figure 17: Attachments Dialog Box 2

Submitting an Announcement

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

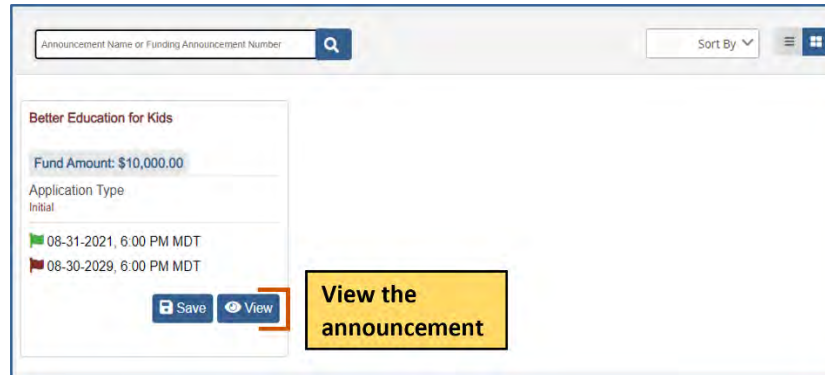


Figure 18: View Announcement

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

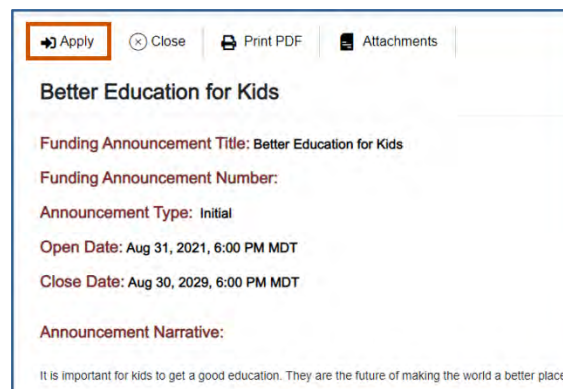


Figure 19: Apply to Announcement

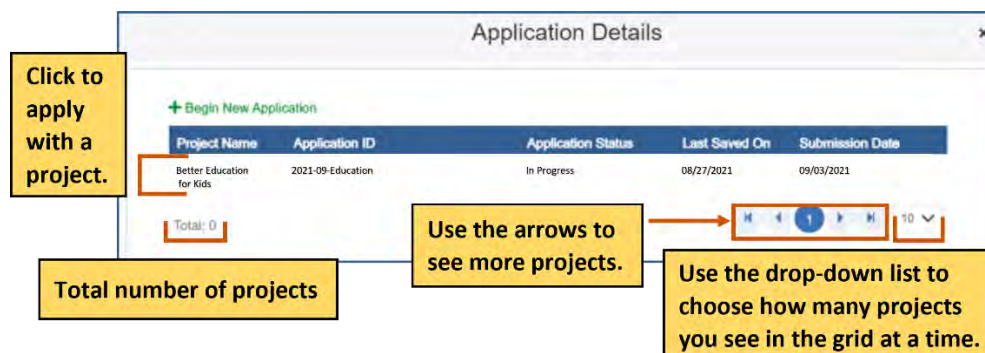
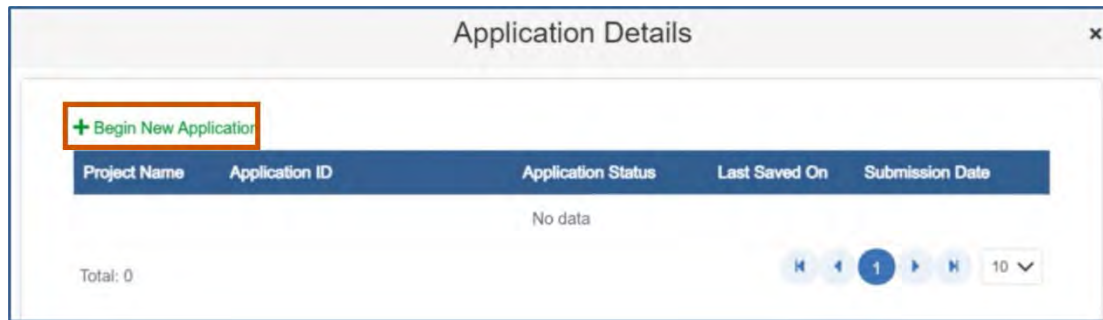



Figure 20: Application Details Dialog Box

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

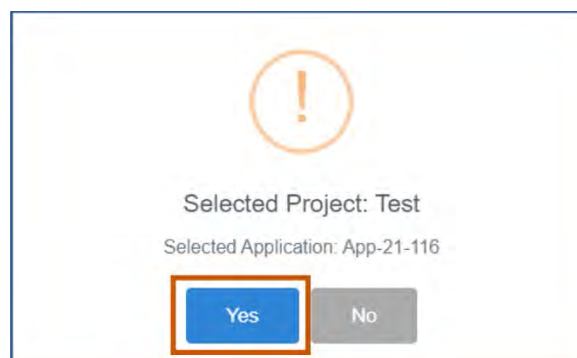
*Figure 21: Begin New Application*

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

The screenshot shows the 'New Application' dialog box. It has a title bar 'New Application' and a close button 'x'. Inside, there is a 'Project Name*' label and a text input field containing 'Clubhouse Education'. To the right of the input field are two buttons: 'Save' (with a floppy disk icon) and 'Close'. The 'Save' button is highlighted with a red rectangular box.

*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.

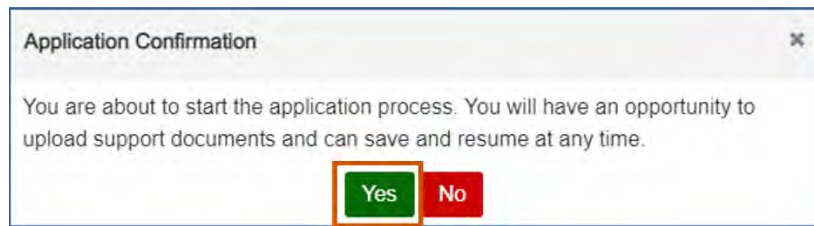


Figure 24: Application Confirmation Dialog Box

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.

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

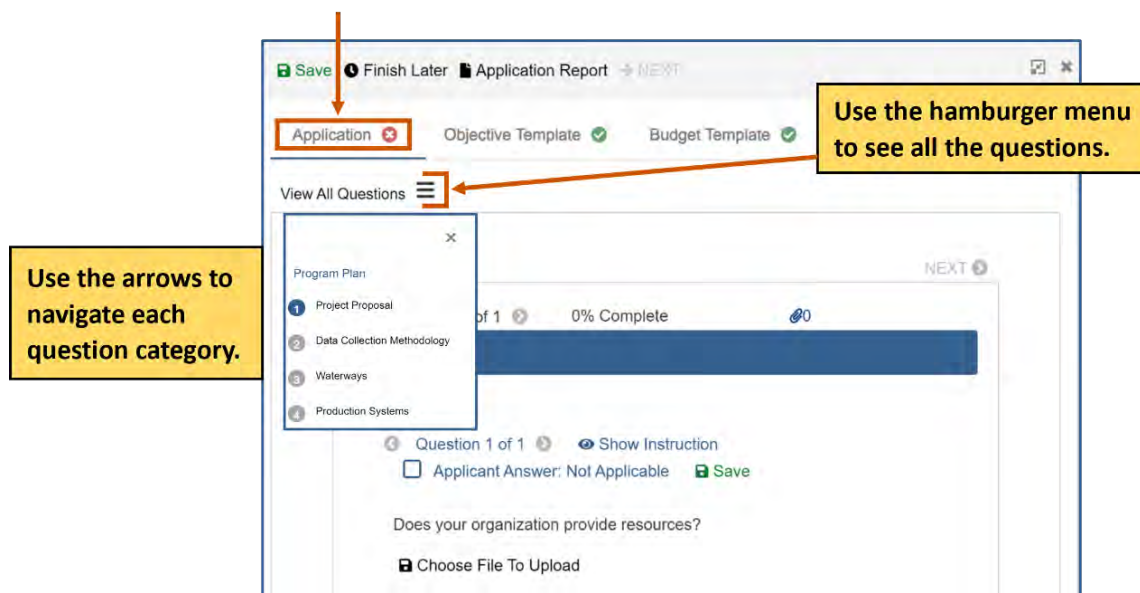


Figure 25: Use Hamburger Menu

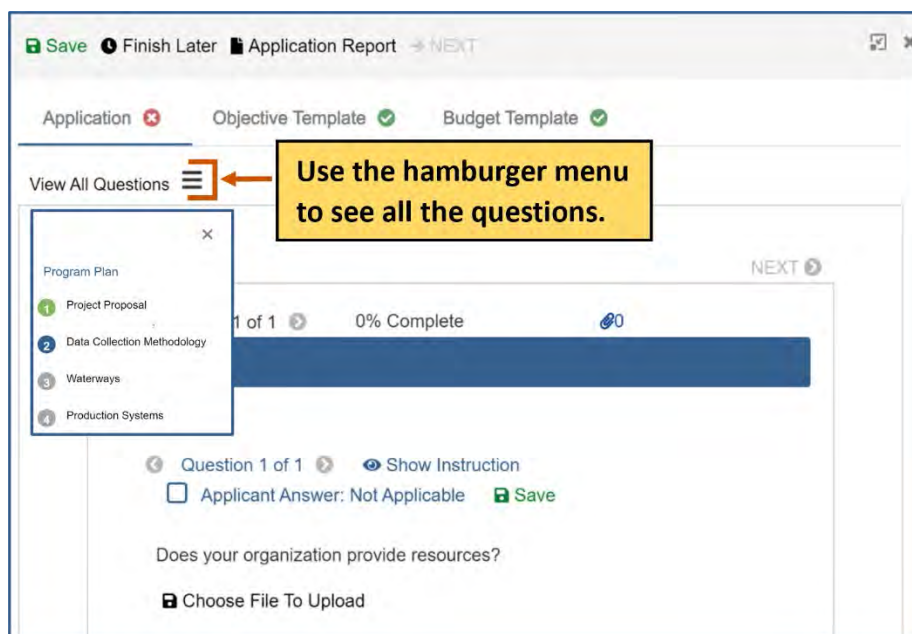


Figure 26: Humber Menu Status

- b. Use the arrows to navigate the questions

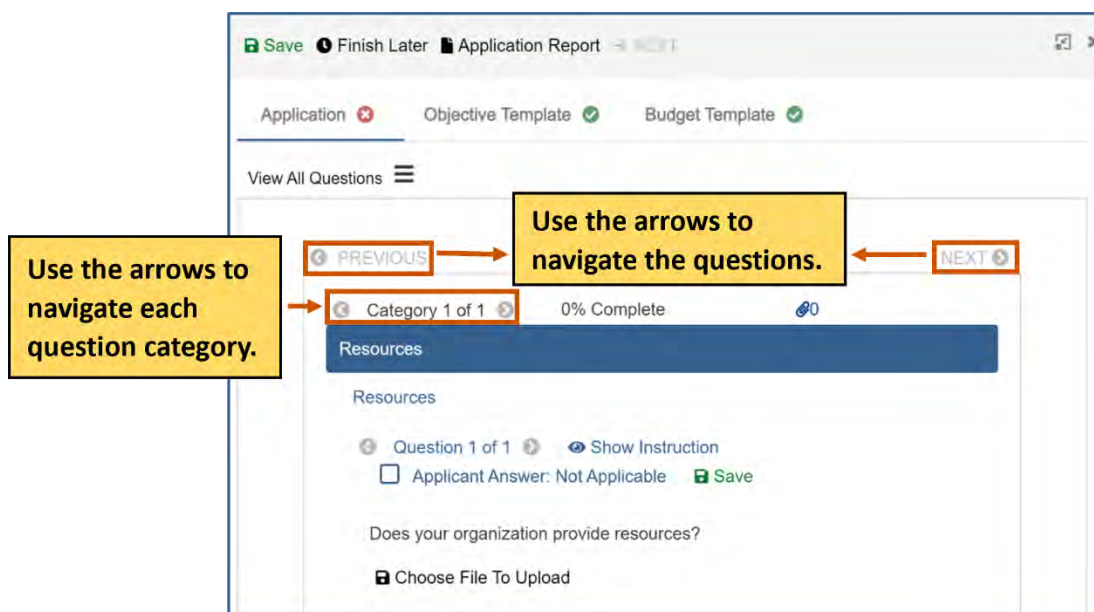



Figure 27: Use Arrows through Questions

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

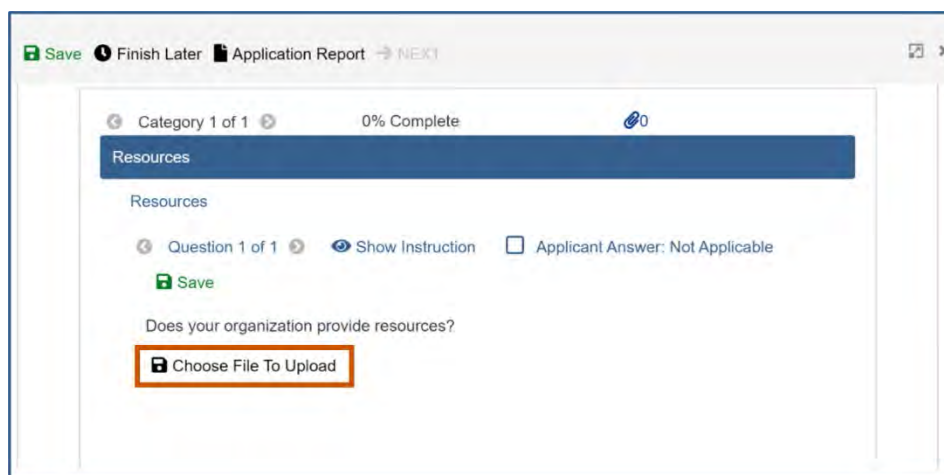


Figure 28: Add Attachment to Question

- ii. Choose from the picklist.

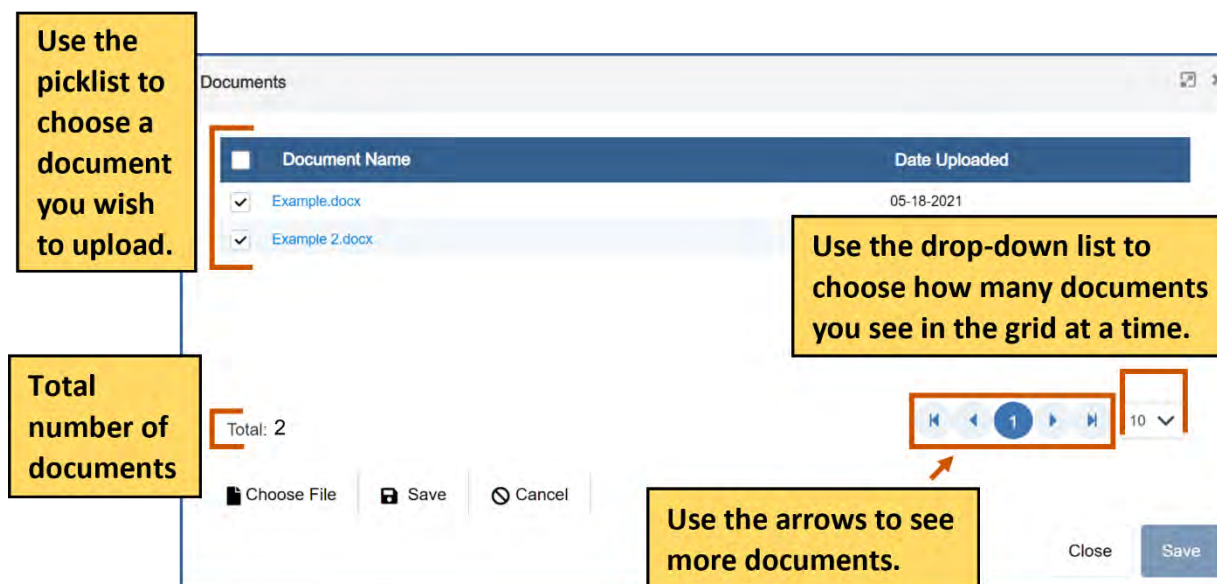




Figure 29: Choose Attachment for Question

Or

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

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

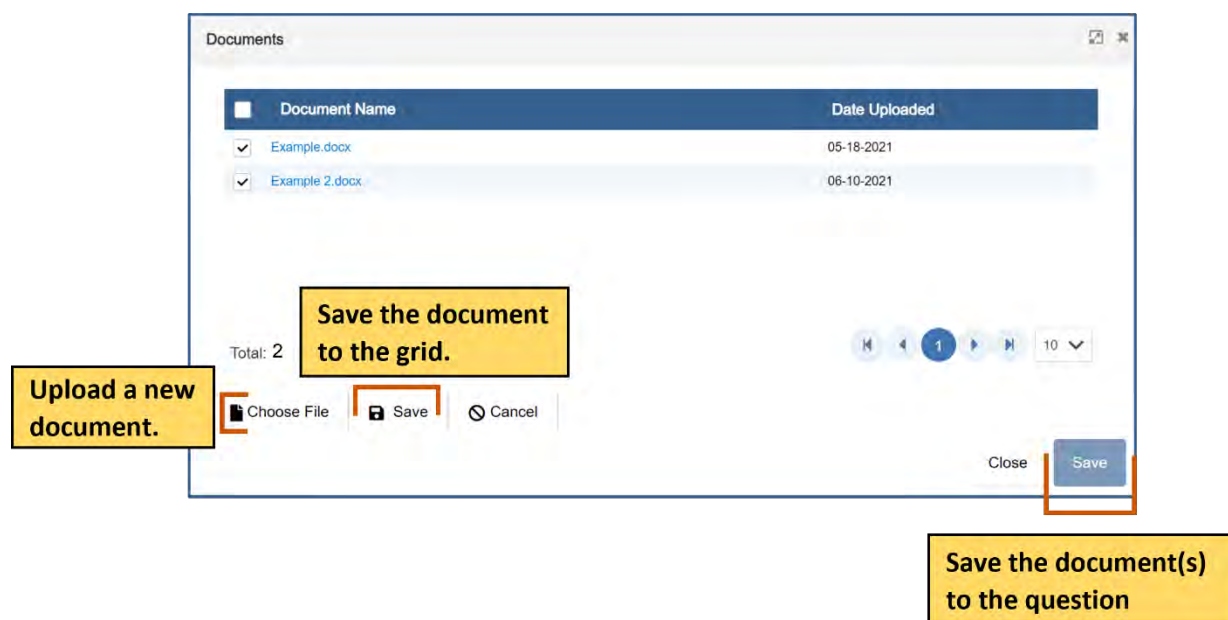


Figure 30: Upload Attachment

Make sure all questions are complete.

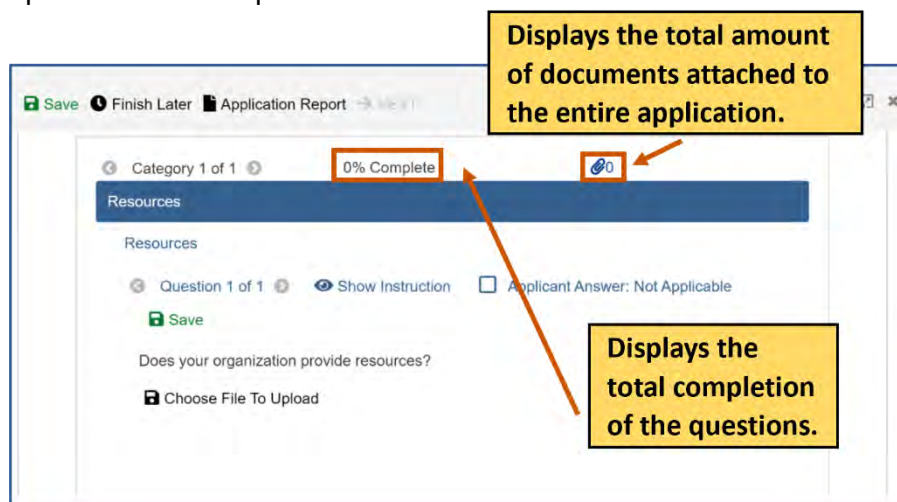


Figure 31: Question Completion

Complete the Objective Template:

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

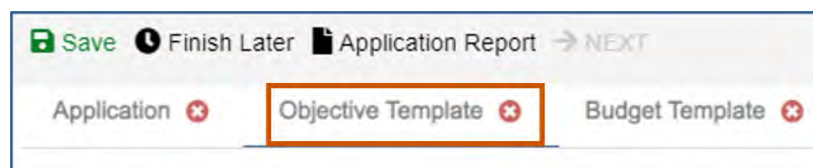


Figure 32: Complete Objective Template

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

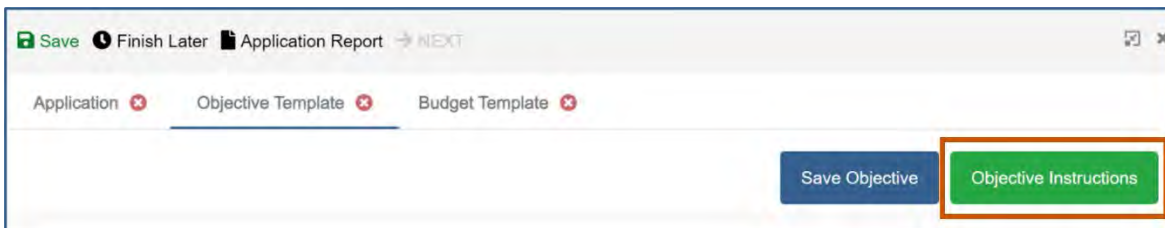




Figure 33: View Objective Instructions

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

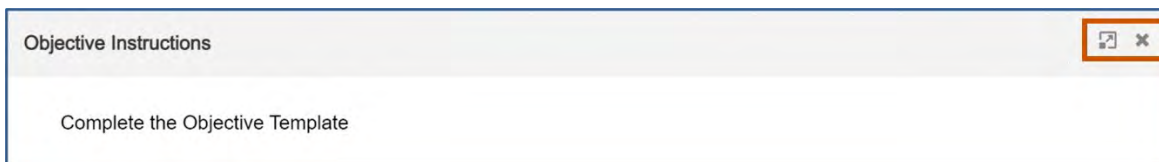




Figure 34: Maximize or Save Objective Instructions

- 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](#).

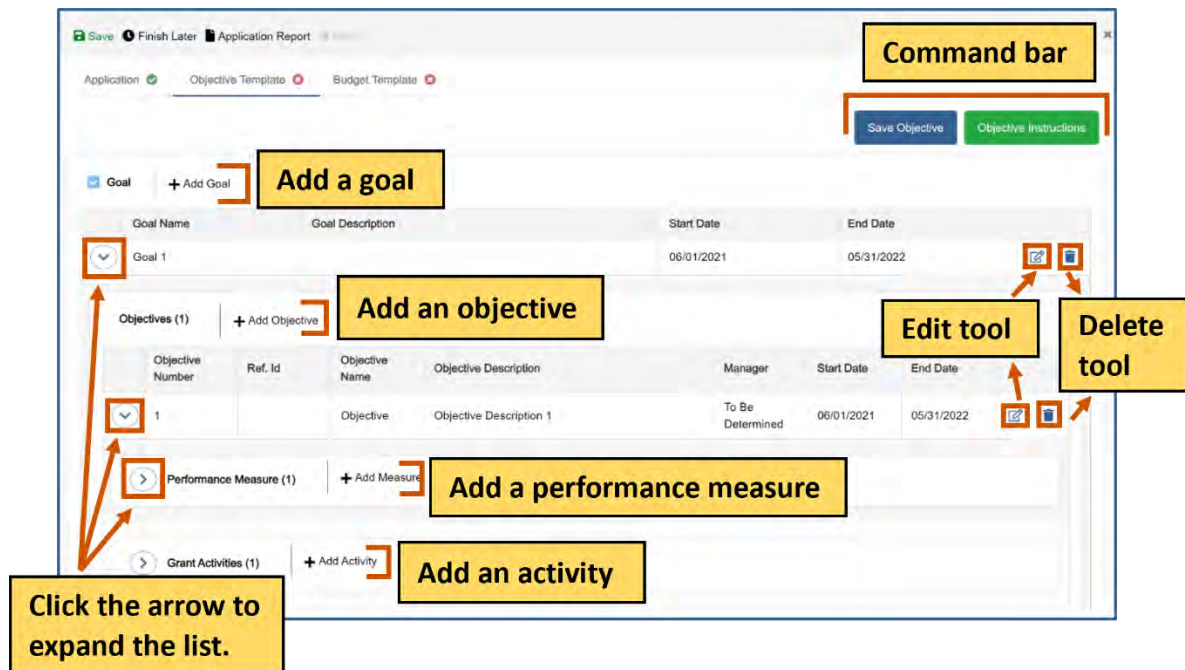


Figure 35: Objective Template

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.

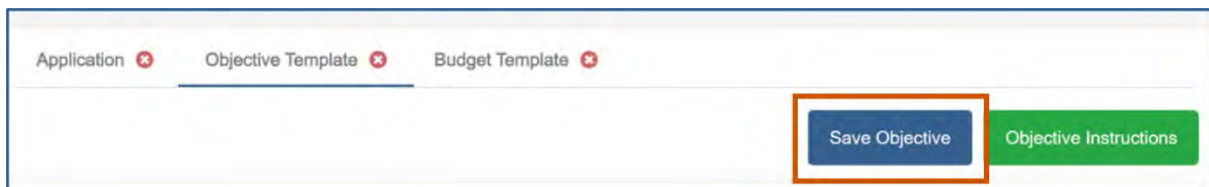


Figure 36: Save Objective Template

- 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.

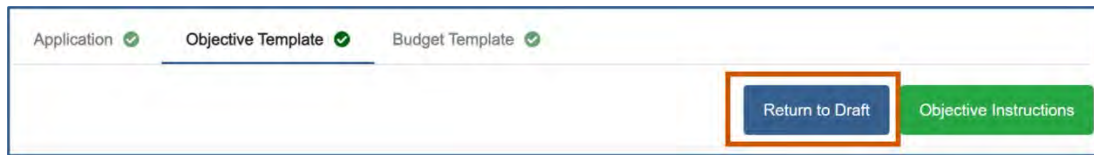


Figure 37: Return Objective Template to Draft

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.

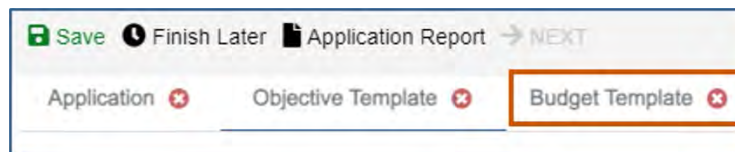


Figure 38: Complete Budget Template

- 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.

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

	Direct	Cash Match	In-Kind Match	Total	Leveraged
Personnel	\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
Project Director	\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
Personnel					
Project Director					
BN test					
BN Project Director - other					
BN Project Coordinator					
BN Equipment					
BN Supplies					
BN Travel					
Total	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

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.

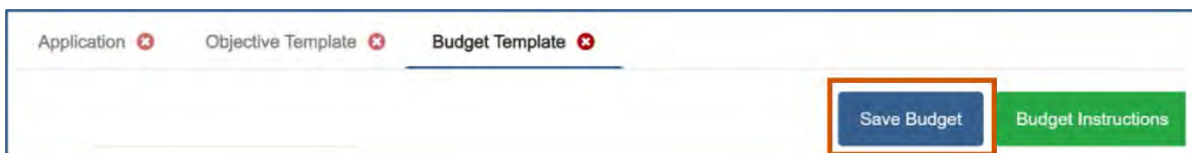


Figure 40: Save Budget Template

- 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.

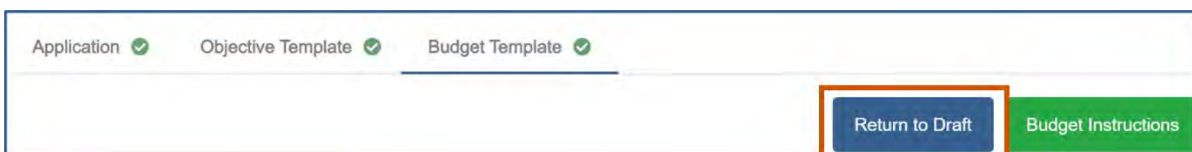


Figure 41: Return Budget Template to Draft

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**.

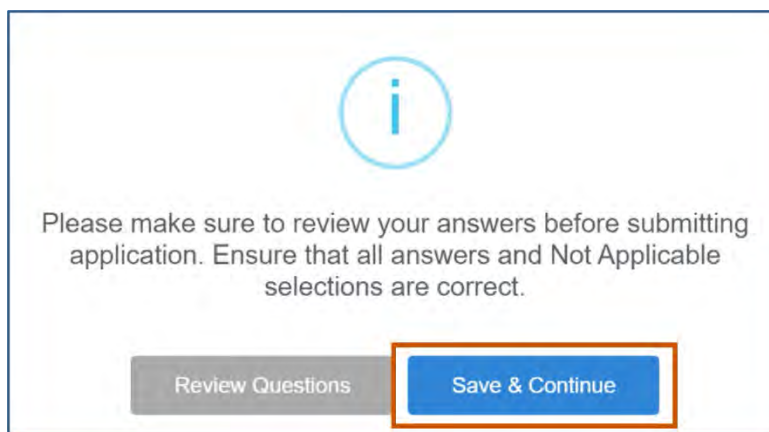


Figure 43: Warning to Check Questions

12. Fill in the necessary fields.

Note: The red asterisks indicate required fields.

Save Finish Later Application Report PREVIOUS Finish

Provide Project Name *

Requested Amount
\$ 500.00

Project Summary *

Project Summary

Authorized Certifying Official

Type to Search Authorized Certifying Official

Project Director/Manager

Type to Search Project Director/Manager

Project Manager/Coordinator

Type to Search Project Manager/Coordinator

Compliance/Fiscal Officer

Type to Search Compliance/Fiscal Officer

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

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.

Save Finish Later Application Report PREVIOUS Finish

Figure 45: Go to Submission Page

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

Save Finish Later Application Report PREVIOUS

You have completed the grant application questionnaire process.

- Select **PREVIOUS** to go back and review or edit your answers.
- Select **Application Report** to view a printable summary of your application.
- Select **Cancel** to save and resume later. Your answers have been saved.
- Select **SUBMIT** to complete this application. This action is not reversible.

Cancel SUBMIT

Figure 46: Submit Application

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

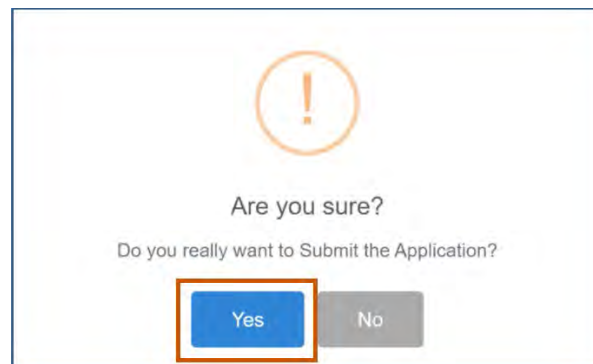


Figure 47: Warning to Submit Application

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.

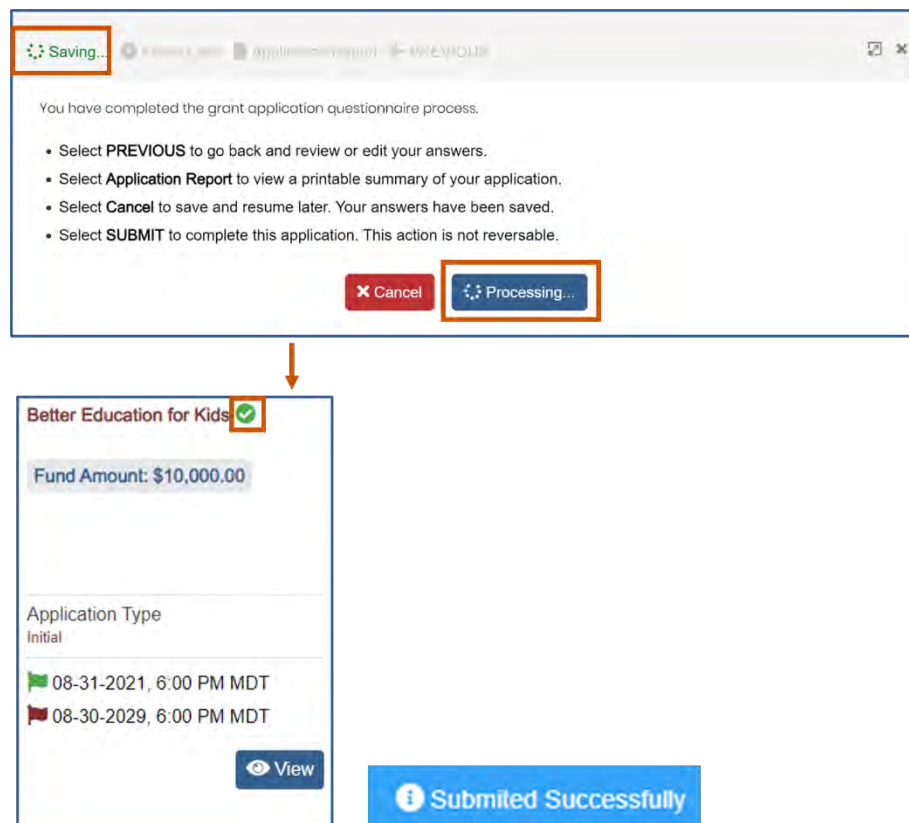
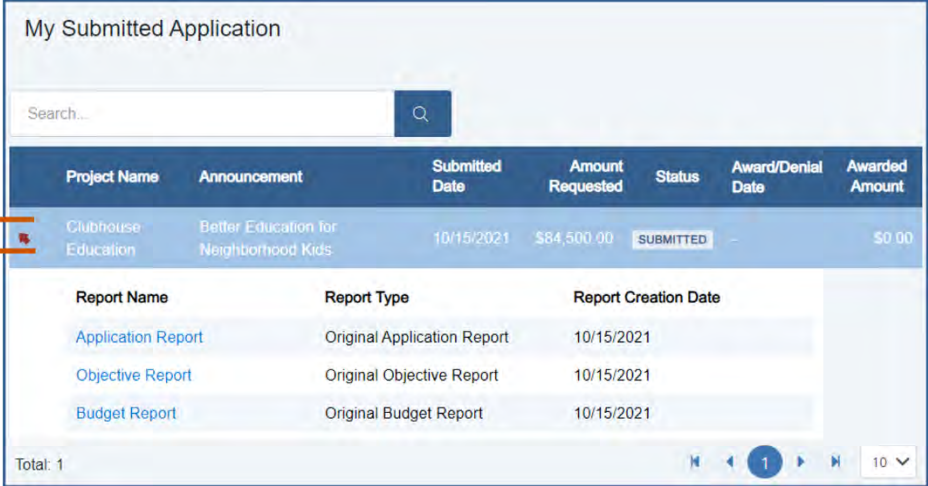


Figure 48: Submit Successful

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

Total: 1

Figure 49: My Submitted Application Screen

View Reports

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

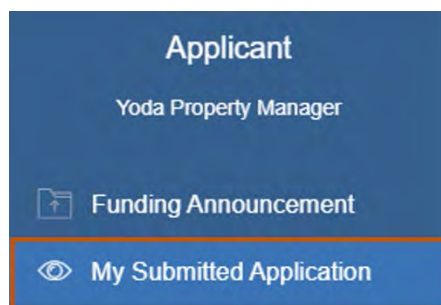


Figure 50: My Site – My Submitted Application

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

My Submitted Application

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

My Submitted Application

Search...

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

1

10

Figure 51: My Submitted Application Screen

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

My Submitted Application

Search...

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

1

10

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.

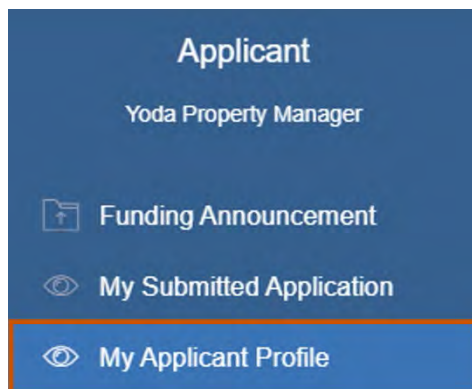



Figure 53: Site Map – My Applicant Profile

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.

The screenshot shows a web form titled "My Applicant Profile : Yoda Property Manager". At the top, there are four tabs: "Organization Information" (selected), "Address", "Users", and "Contact". The form contains several input fields arranged in two columns. The left column includes "Organization Name" (with a red asterisk), "Organization Type" (a dropdown menu), "Website URL", and "Fax Number". The right column includes "EIN", "DUNS Number", and "Main Phone". The "Organization Name" field contains the text "Yoda Property Manager". The "Organization Type" dropdown is set to "Nonprofit". The "Main Phone" field contains the text "+13031231234". A blue "Save" button is located at the bottom right of the form.

Organization Name *	EIN
Yoda Property Manager	
Organization Type	DUNS Number
Nonprofit	
Website URL	Main Phone
	+13031231234
Fax Number	

Save

Figure 54: My Applicant Profile – Organization Information Tab

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

My Applicant Profile : Yoda Property Manager

Organization Information **Address** Users Contact Documents

Mailing Address

Address Line 1 Address Line 2 City

County State/Province/Region Country

Postal Code

Physical Address ☐ Same as Mailing Address

Address Line 1 Address Line 2 City

County State/Province/Region Country

Postal Code

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.

My Applicant Profile : Yoda Property Manager

Organization Information Address **Users** Contact Documents Award Status

<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

Use the arrows to see more users.

Use the drop-down list to choose how many users you see in the grid at a time.

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

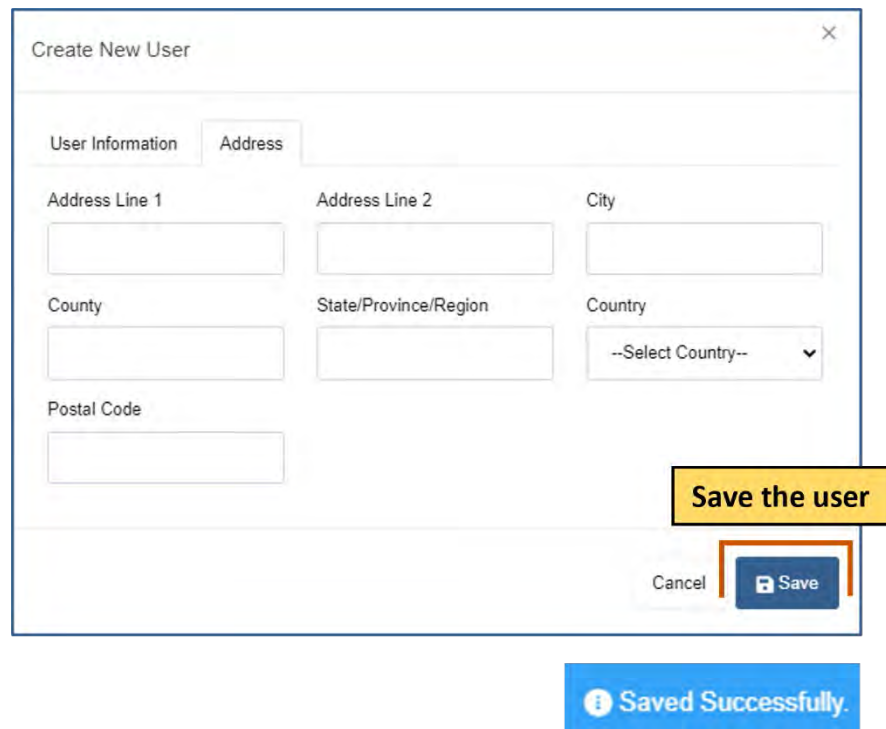
Figure 57: Add User

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

The screenshot shows a web form titled "Create New User" with a close button in the top right corner. The form has two tabs: "User Information" (selected) and "Address". Under the "User Information" tab, there is a profile picture placeholder on the left. To its right are input fields for "First Name *" and "Last Name *". Below these is a "Job Title" field. Further down are fields for "Email Address *" and "Phone Number". The "User Name *" field is followed by a red error message: "You must be at least 6 characters long". Below that are fields for "Password *" and "Password (repeat) *", with a red error message "Passwords do not match" appearing below the second field. At the bottom right, there are "Cancel" and "Save" buttons.

Figure 58: Create New User – User Information Tab

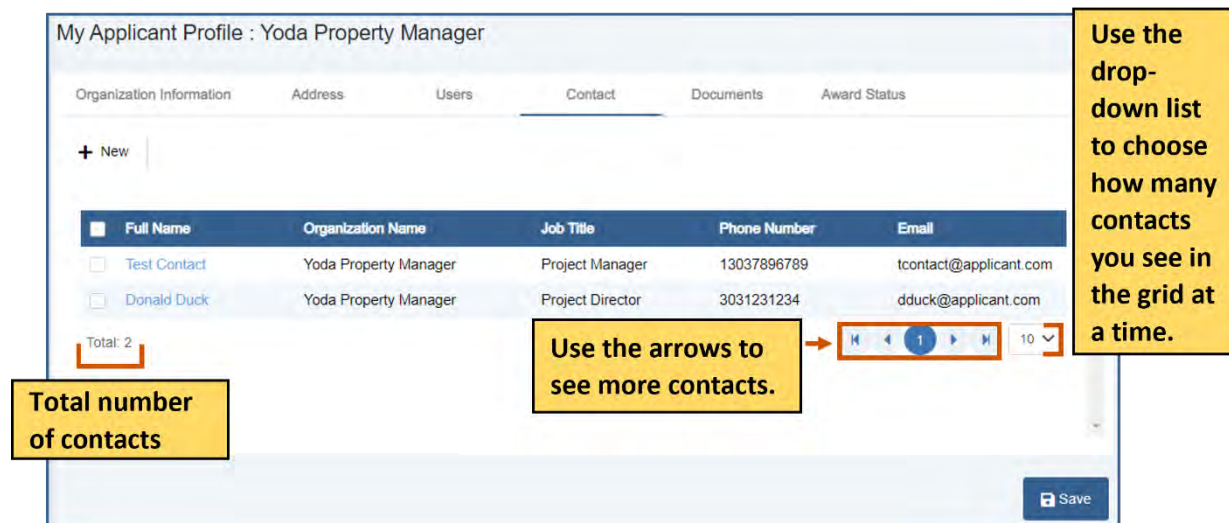
- c. **Optional:** On the Address information tab, fill in the necessary fields.
- d. Click  **Save** to save the user. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 4a-4d for each user.



The image shows a 'Create New User' dialog box with the 'Address' tab selected. It contains fields for Address Line 1, Address Line 2, City, County, State/Province/Region, Country (a dropdown menu), and Postal Code. At the bottom right, there is a 'Save the user' button and a 'Save' button. A 'Cancel' button is also present. A blue notification bar at the bottom right says '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.



The image shows the 'My Applicant Profile' page for 'Yoda Property Manager' with the 'Contact' tab selected. It displays a table of contacts with columns: Full Name, Organization Name, Job Title, Phone Number, and Email. There are two contacts listed: 'Test Contact' and 'Donald Duck'. A 'Total: 2' label is shown below the table. A 'Save' button is at the bottom right. A yellow callout box on the right says 'Use the drop-down list to choose how many contacts you see in the grid at a time.' A yellow callout box at the bottom center says 'Use the arrows to see more contacts.' pointing to the pagination controls.

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.

My Applicant Profile : Yoda Property Manager

Organization Information Address Users **Contact** Documents Award Status

+ New ← **Add contact**

	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

Save

Figure 61: Add Contact

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

Create new contact

Contact Details Address

First Name * Last Name *

Job Title * Email *

Phone Number * Fax Number

Cancel Save

Figure 62: Create New Contact – Contact Details Tab

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

Create new contact

Contact Details Address

Address Line 1 Address Line 2 City

County State/Province/Region Country


Postal Code

Save the contact to the grid.

Cancel Save




Saved Successfully

Figure 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.


My Applicant Profile : Yoda Property Manager

Organization Information Address Users Contact Documents Award Status

 Choose File  Save  Cancel

Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/>	Budget For - Zebras Can Swim Across Streams-28-Apr-2021-21_22_26.pdf	PDF File	04-28-2021
<input type="checkbox"/>	Application for - Clubhouse Education.pdf	PDF File	10-15-2021
<input type="checkbox"/>	Objective For - Zebras Can Swim Across Streams-28-Apr-2021-23_16_25.pdf	PDF File	04-28-2021
<input type="checkbox"/>	Objective For - Zebras Can Swim Across Streams-28-Apr-2021-23_04_03.pdf	PDF File	04-28-2021
<input type="checkbox"/>	Objective For - Better Education for Neighborhood Kids-18-Oct-2021-19_16_13.pdf	PDF File	10-18-2021
<input type="checkbox"/>	Example.docx	Word Document	09-05-2021
<input type="checkbox"/>	Application for - Zebras Can Swim Across Streams.pdf	PDF File	04-27-2021
<input type="checkbox"/>	Application for - Opportunity for Youth.pdf	PDF File	10-21-2021
<input type="checkbox"/>	Example 2.docx	Word Document	10-08-2021
<input type="checkbox"/>	Application for - Better Education for Kids.pdf	PDF File	09-05-2021

Total: 10

 Save



My Applicant Profile : Yoda Property Manager

Organization Information Address Users Contact Documents Award Status








 Bracket.docx  Save  Cancel

Figure 64: Add Attachment to Profile

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

My Applicant Profile : Yoda Property Manager

Organization Information Address Users Contact Documents Award Status

 Bracket.docx  Save 


 Saved Successfully.

Figure 65: Save Attachment to Profile

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

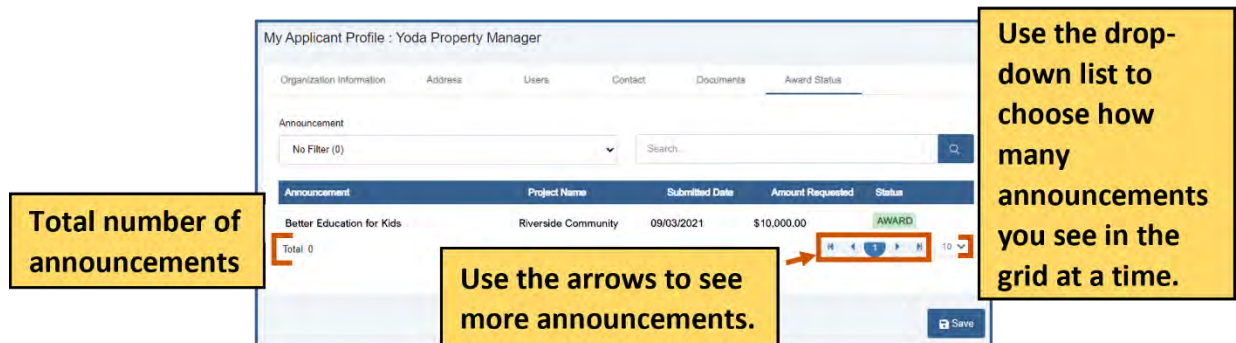


Figure 66: Create New Contact – Award Status Tab

- Click the Award Status tab.
- Use the Announcement drop-down list to choose an announcement.
Or
Use the search bar to find an announcement.

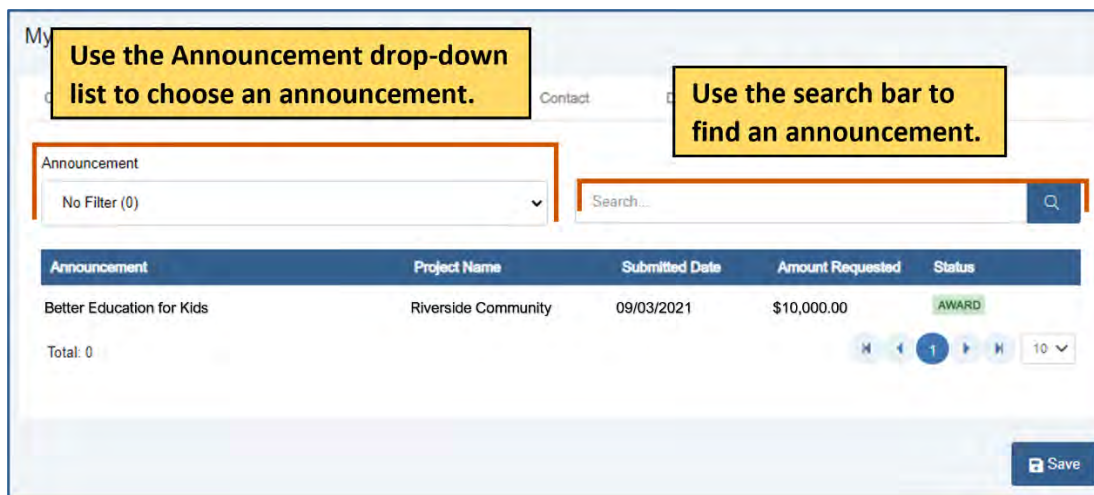



Figure 67: Choose Announcement

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.

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

Save the applicant profile.

Save

 Saved Successfully.

Figure 68: Save Applicant Profile

Users

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

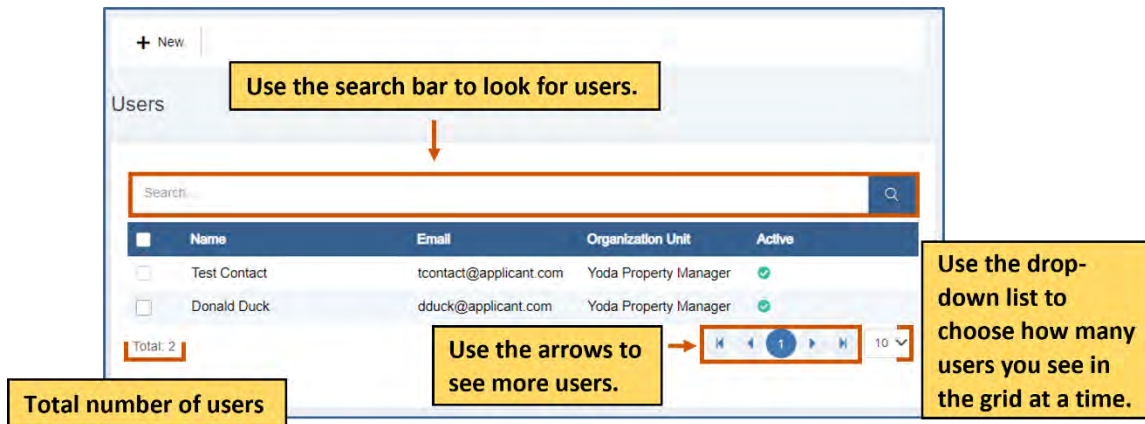


Figure 69: Active Users Screen

Active

You can view active users.

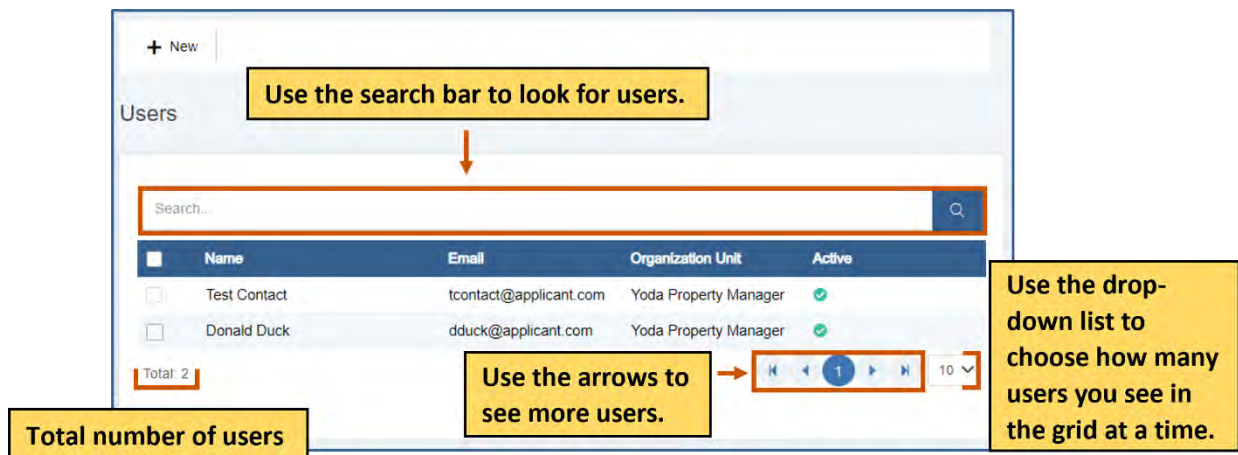




Figure 70: Active Users Screen

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

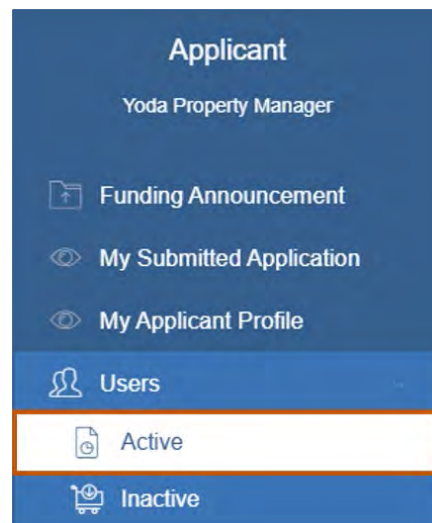


Figure 71: Site Map – Active Users

Inactive

You can view inactive review panels.

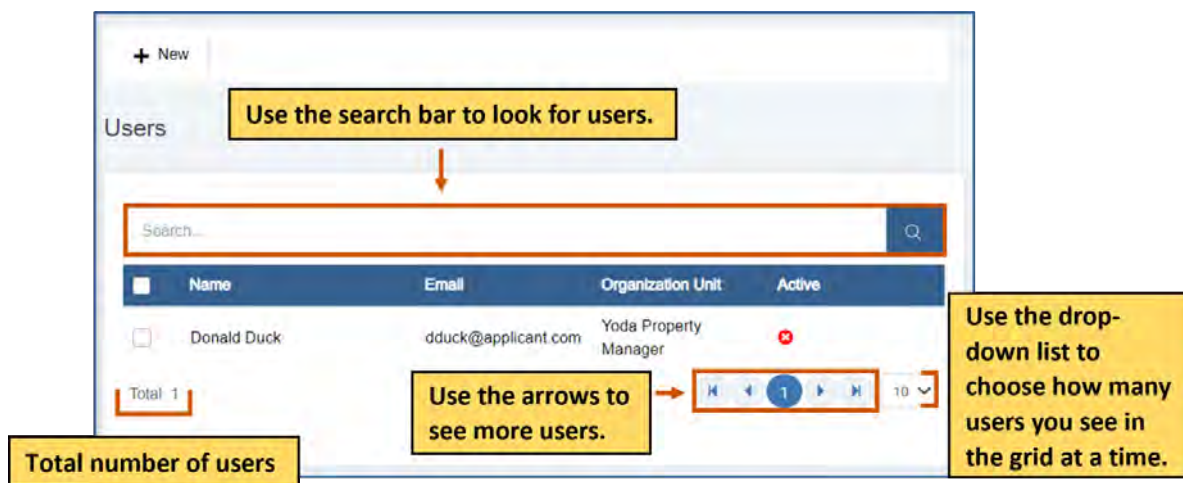




Figure 72: Inactive Users Screen

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

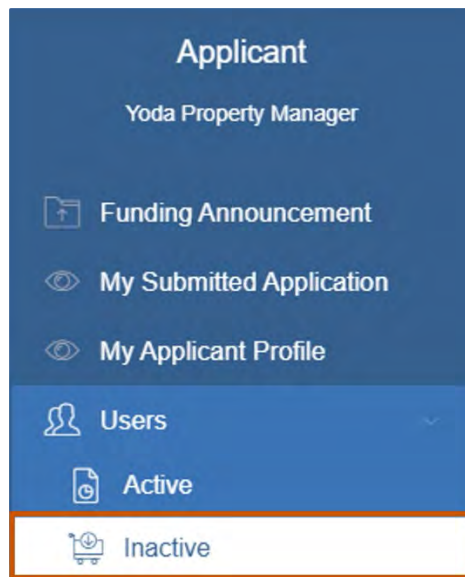




Figure 73: Site Map – Inactive Users

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.

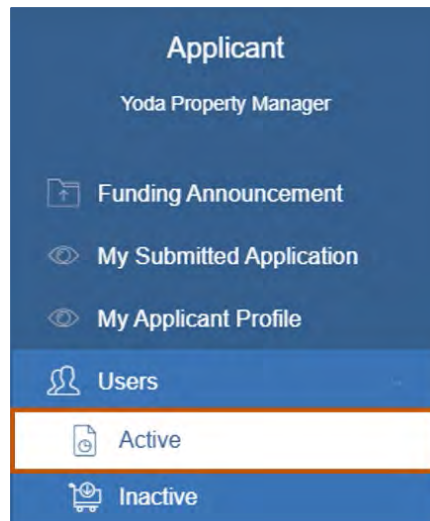


Figure 74: Site Map – Active Users

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

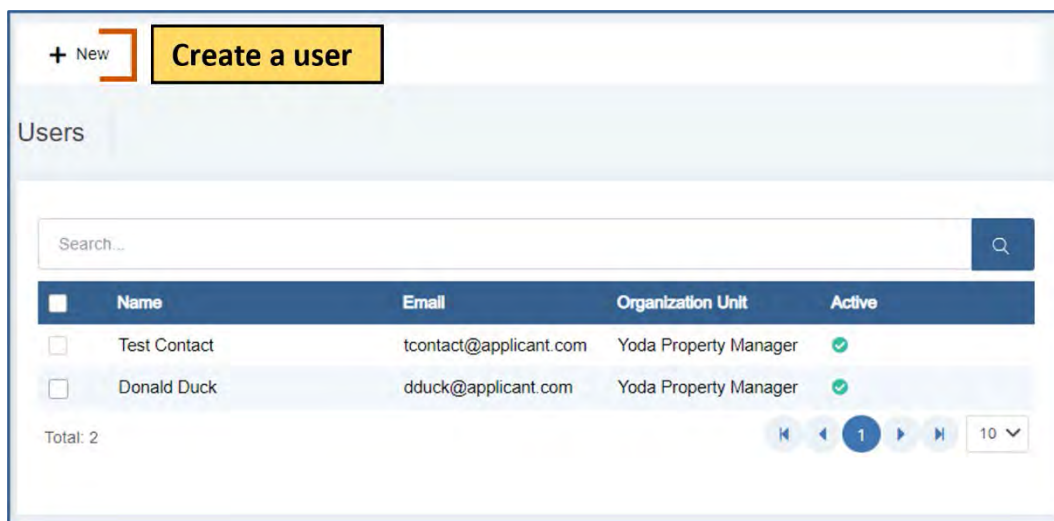




Figure 75: Create User

Under the Active column:

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

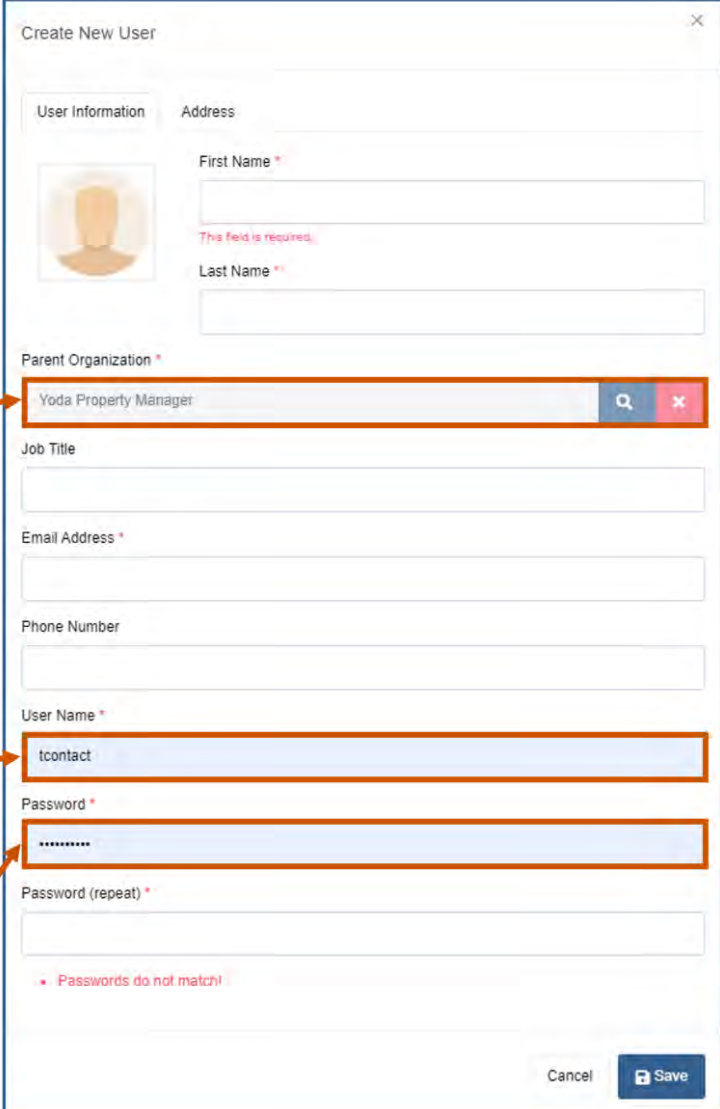
3. On the User information tab, fill in the necessary fields.

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.




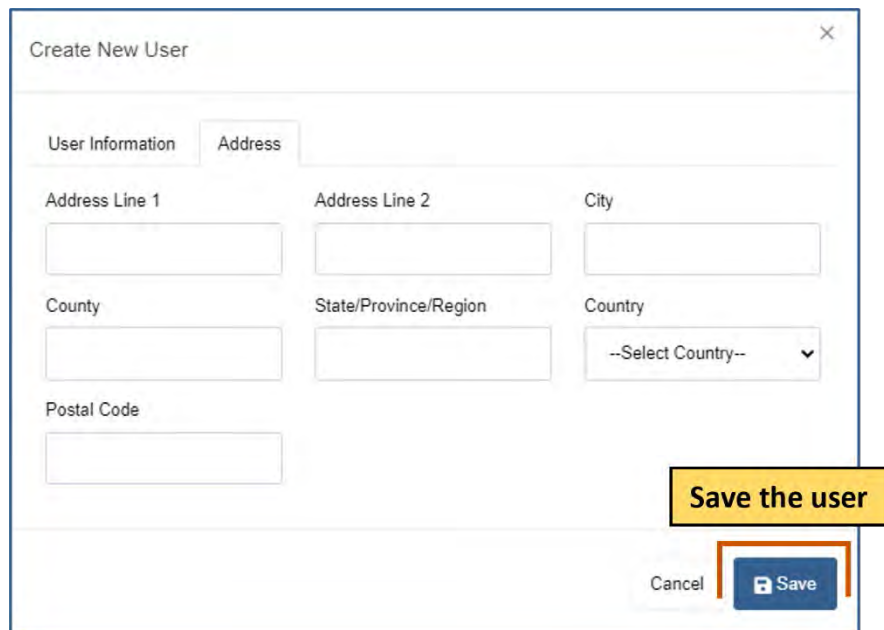
The screenshot shows the 'Create New User' form with two tabs: 'User Information' and 'Address'. The 'User Information' tab is active. Fields include: First Name (required), Last Name (required), Parent Organization (dropdown menu with a search icon and 'x' button, highlighted with an orange box and an arrow pointing to it), Job Title, Email Address (required), Phone Number, User Name (required, highlighted with an orange box and an arrow pointing to it), Password (required, highlighted with an orange box and an arrow pointing to it), and Password (repeat) (required). A red asterisk is next to the Password (repeat) field. A red error message 'Passwords do not match!' is visible below the Password (repeat) field. The form has '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.

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.



The image shows a 'Create New User' dialog box with two tabs: 'User Information' and 'Address'. The 'Address' tab is active. It contains several input fields: 'Address Line 1', 'Address Line 2', 'City', 'County', 'State/Province/Region', 'Country' (a dropdown menu with '--Select Country--'), and 'Postal Code'. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Save'. A yellow callout box with the text 'Save the user' points to the 'Save' button. The 'Save' button is also highlighted with a red rectangle.


 **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.

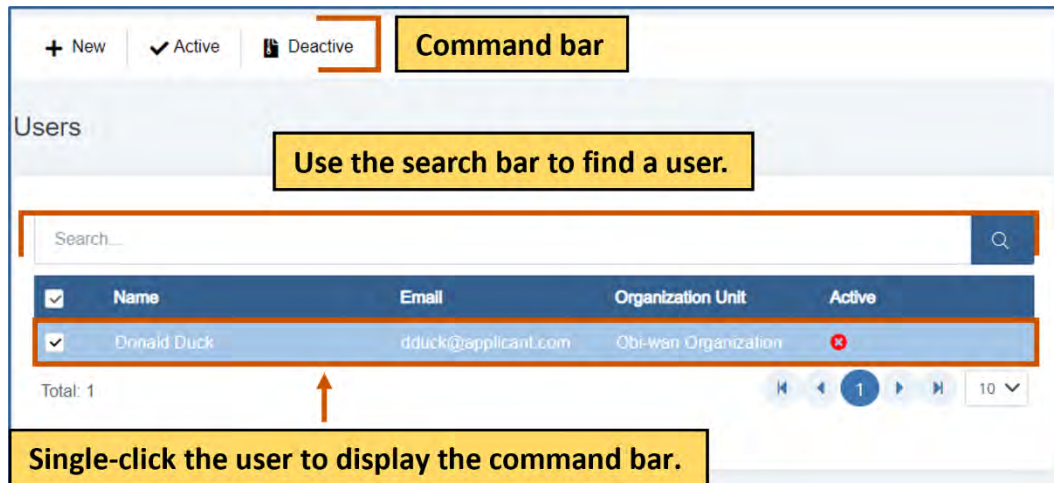


Figure 78: Display User Commands

3. Edit the necessary fields for each tab.
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 fields for Address Line 1, Address Line 2, City, County, State/Province/Region, and Postal Code. A 'Country' dropdown menu is set to '--Select Country--'. A yellow callout box says 'Save the user'. At the bottom right, there are 'Cancel' and 'Save' buttons. A blue popup at the bottom right says '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.

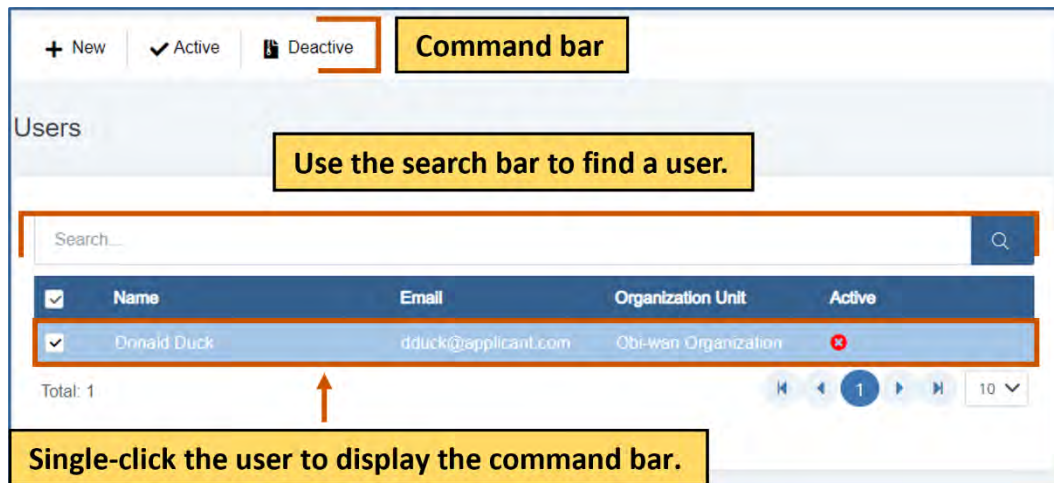


Figure 80: Display User Commands

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

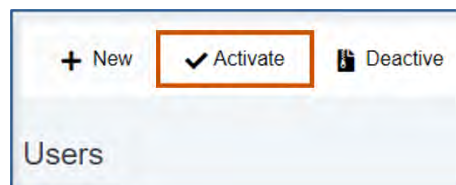


Figure 81: Activate User

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.

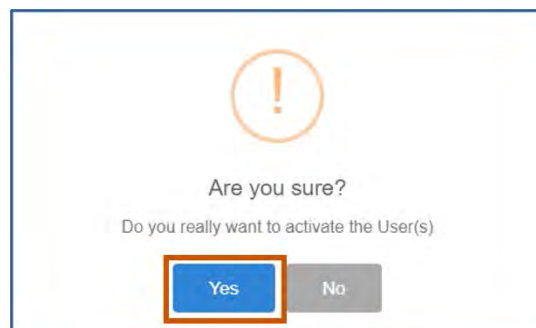


Figure 82: Warning to Activate User

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.

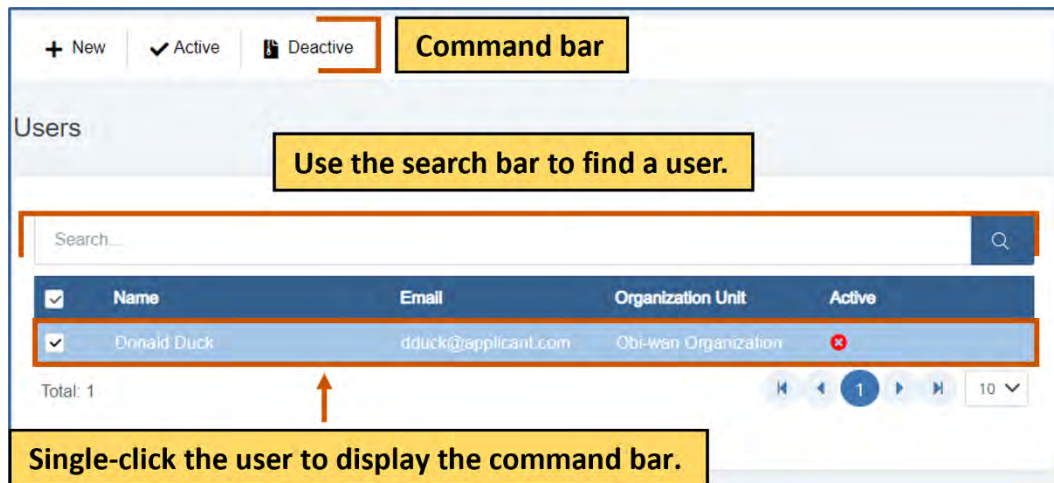


Figure 83: Display User Commands

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

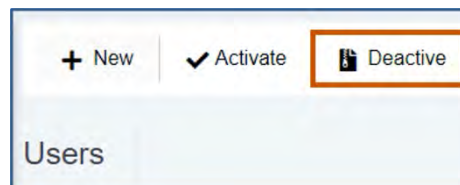


Figure 84: Deactivate User

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.

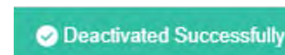
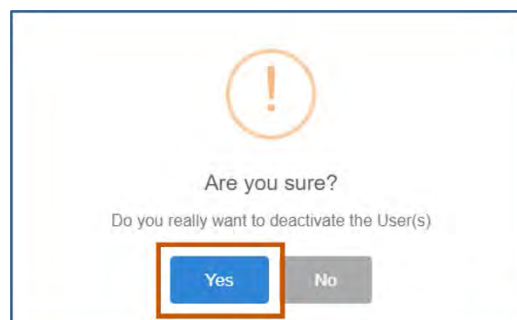


Figure 85: Warning to Activate User

Contacts

View the contacts related to the application.

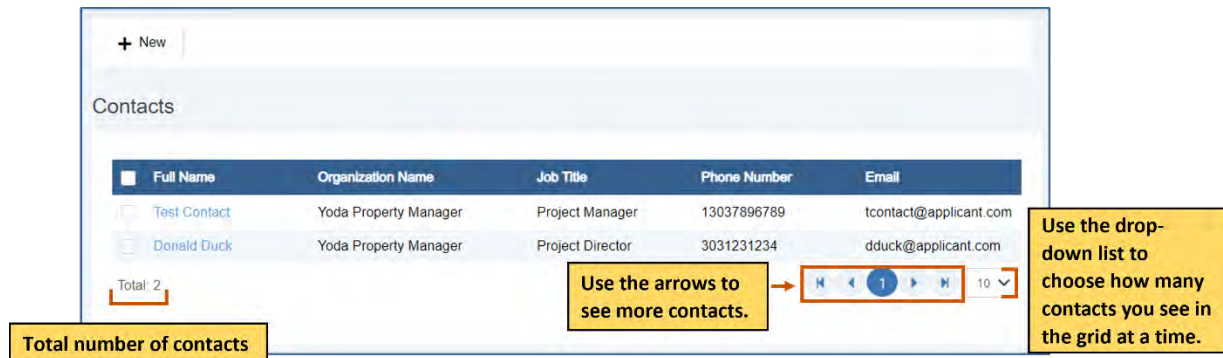


Figure 86: Contacts Screen

Add a Contact

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

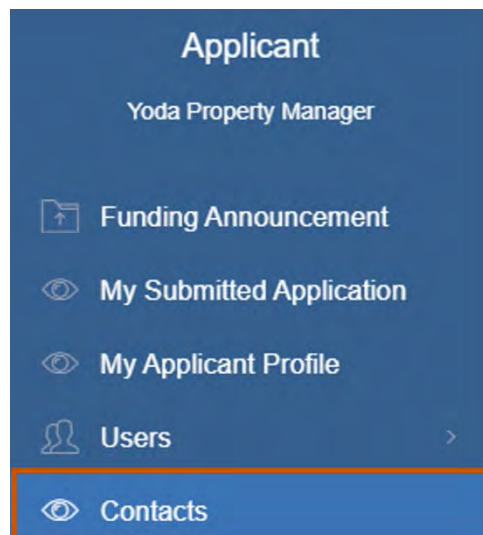


Figure 87: Site Map - Contacts

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

The screenshot shows a web interface for managing contacts. At the top, there is a '+ New' button and a yellow 'Create a contact' button. Below this is a 'Contacts' tab. A table lists existing contacts with columns: Full Name, Organization Name, Job Title, Phone Number, and Email. Two contacts are listed: 'Test Contact' and 'Donald Duck', both from 'Obi-wan Organization'. At the bottom, it says 'Total: 2' and has pagination controls showing page 1 of 10.

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

Total: 2

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' modal window with two tabs: 'Contact Details' and 'Address'. The 'Contact Details' tab is active. It contains several text input fields with red asterisks indicating required fields: First Name, Last Name, Job Title, Email, and Phone Number. There is also a Fax Number field. At the bottom right, there are 'Cancel' and 'Save' buttons.

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.

Create new contact

Contact Details Address

Address Line 1 Address Line 2 City

County State/Province/Region Country

Postal Code

Save the contact to the grid.

Cancel Save

Saved Successfully.

Figure 90: Create New Contact – Address Tab

Edit a Contact

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

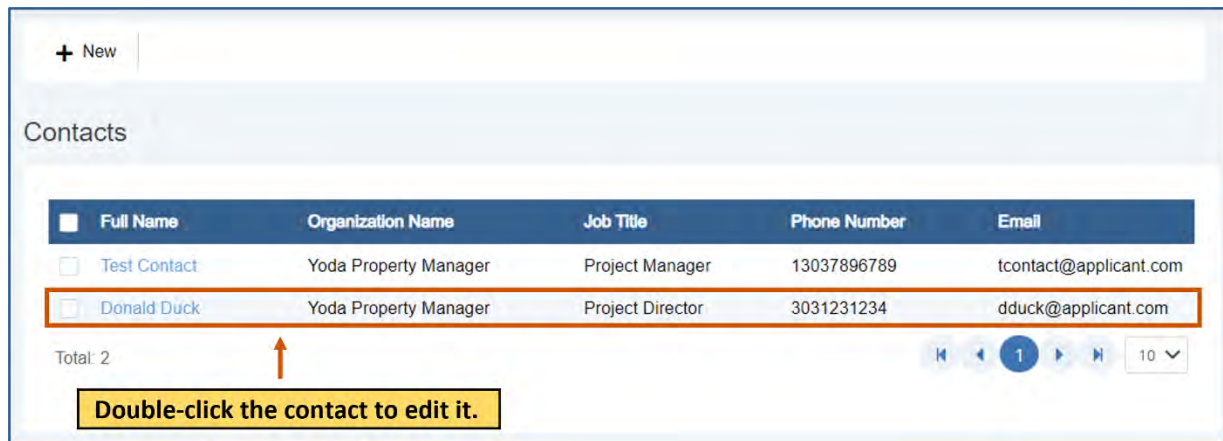


Figure 91: Edit Contact

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.

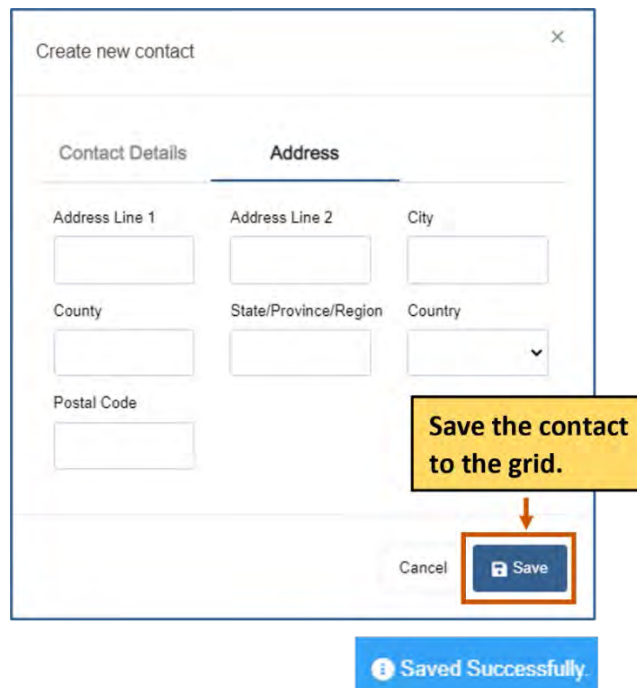


Figure 92: Create New Contact – Address Tab

Delete a Contact

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

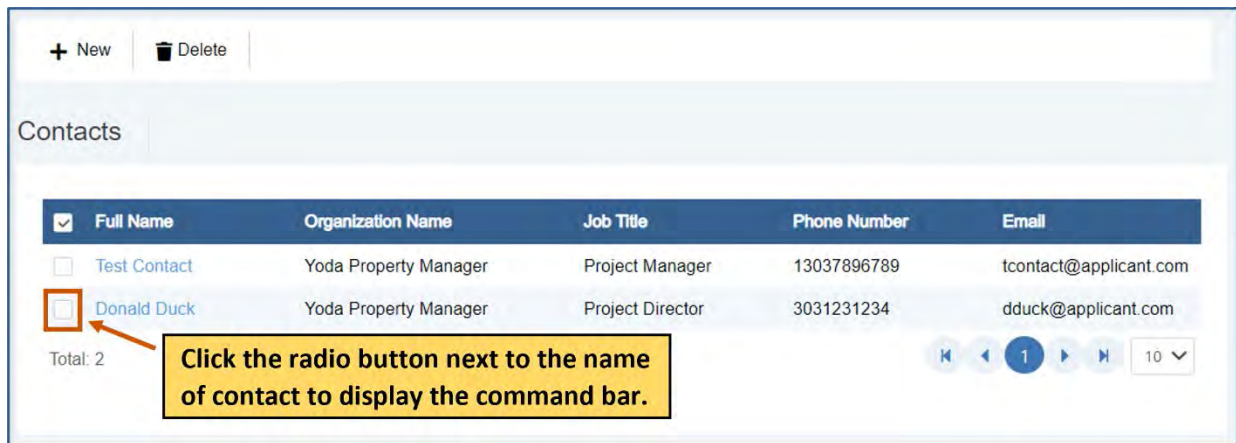


Figure 93: Click Contact

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

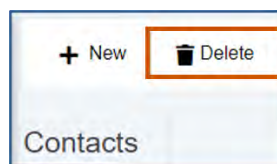


Figure 94: Delete Contact

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.

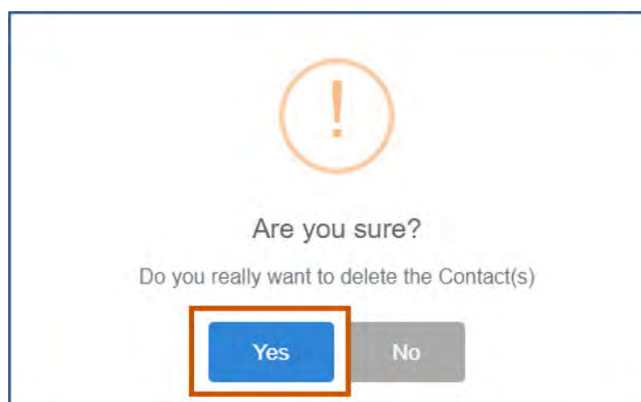


Figure 95: Warning to Delete Contact

Documents

View documents related to the application.

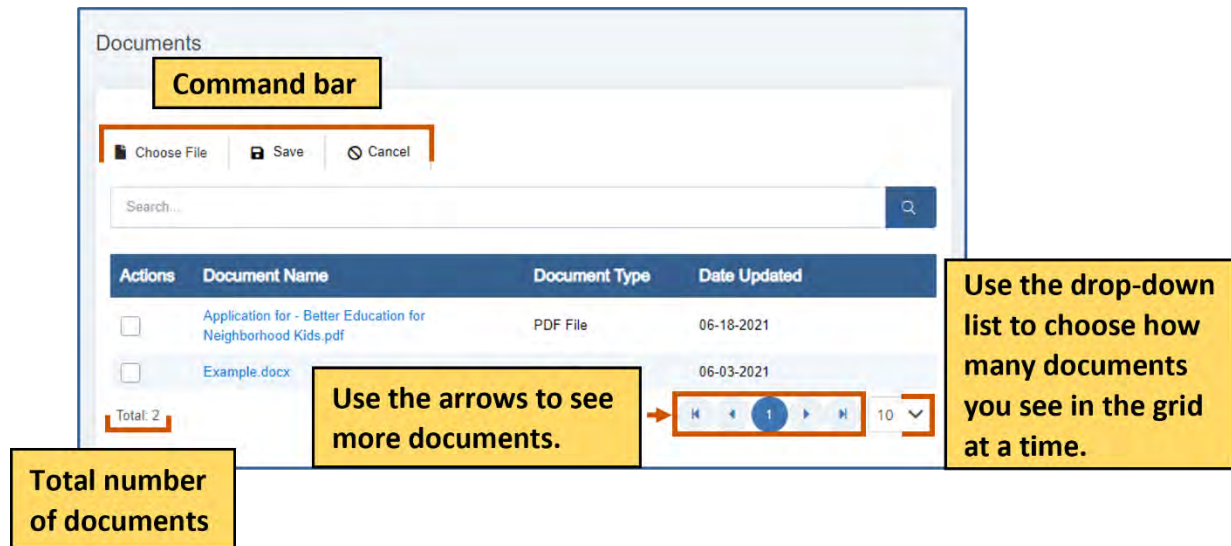


Figure 96: Documents Screen





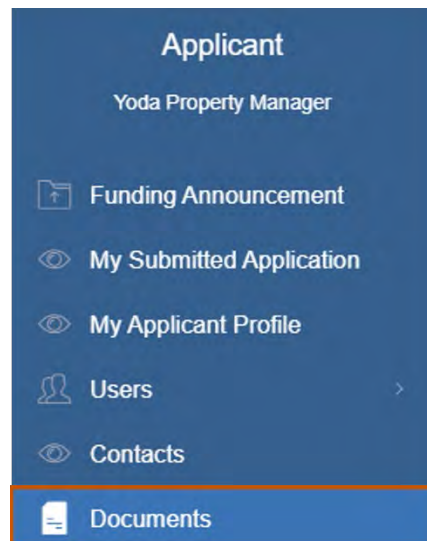


Command Options		Description
Choose File		Choose the file you want to upload.
Save		Save the file you want to upload
Cancel		If you choose a file you do not want to upload, you can cancel uploading the file.

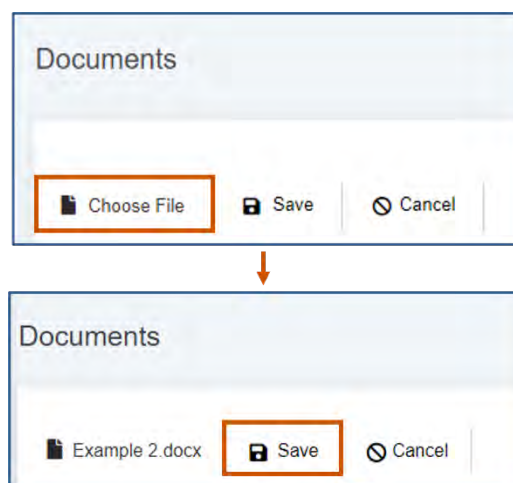
Table 3: Document Command Options

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.

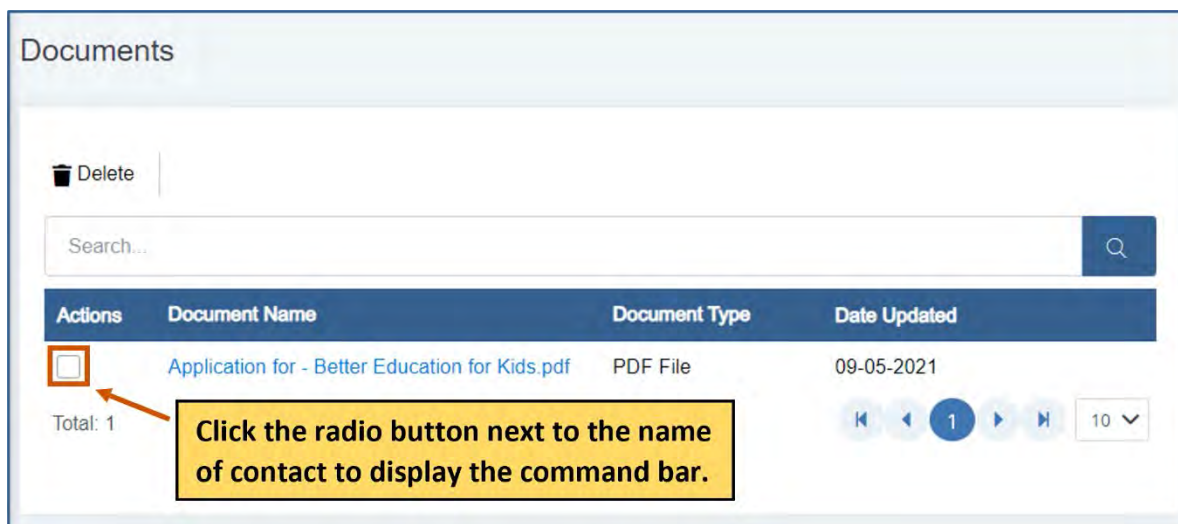


Figure 99: Click Document

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

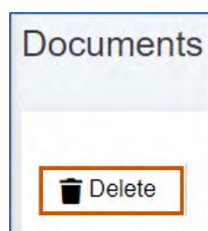


Figure 100: Delete Document

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.

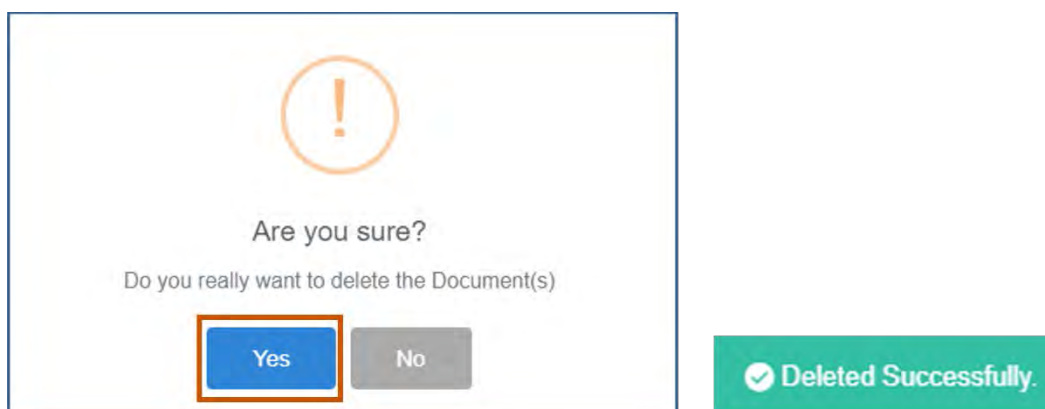


Figure 101: Warning to Delete Document

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.

The screenshot shows the 'Update Objective' window with several sections and annotations:

- Command bar:** Located at the top right, containing 'Close' and 'Minimize' buttons.
- Goal section:** Includes a '+ Add Goal' button and a table with columns: Goal Name, Goal Description, Start Date, and End Date. A dropdown arrow next to 'Existing Objective' is highlighted with the annotation 'Use the arrow to expand the list.'
- Objectives (1) section:** A table with columns: Objective Number, Ref. Id, Objective Name, Objective Description, Manager, Start Date, and End Date. A dropdown arrow next to the first row is highlighted with the annotation 'Use the arrow to expand the list.'
- Performance Measure (4) section:** A table with columns: Ref. Id, Performance Measure, Manager, Type, Planned, Actual, and Active. A dropdown arrow next to the first row is highlighted with the annotation 'Use the arrow to expand the list.'
- Grant Activities (2) section:** A table with columns: Ref. Id, Grant Activities, Manager, Start, Due Date, and Active. A dropdown arrow next to the first row is highlighted with the annotation 'Use the arrow to expand the list.'
- Edit or delete the objective:** A callout box pointing to the edit and delete icons in the Objectives table.

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

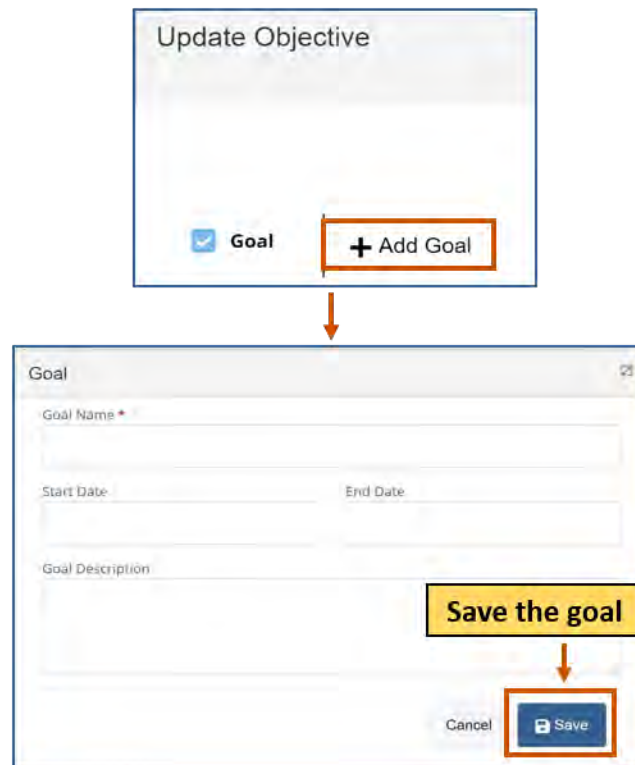


Figure 106: Add Goal

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.

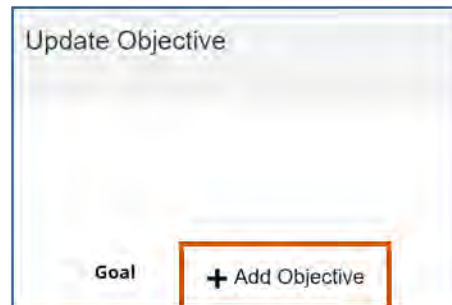


Figure 107: Add Objective

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.

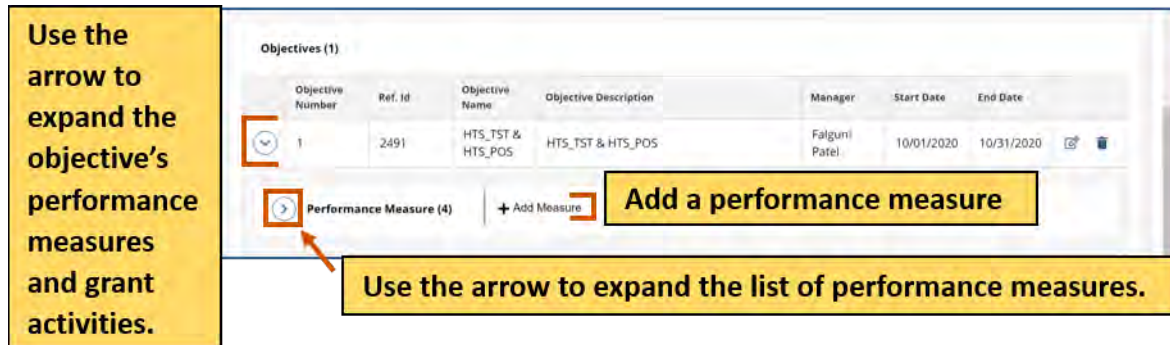


Figure 109: Add Measure

4. Fill in the necessary fields.
5. Click **Save**. The performance measure appears in the grid. Repeat steps 3-5 for each performance measure you wish to add.

Performance Measure

Measure Description *

Type of Measure * Number Manager * --Select Manager--

Start Date * End Date *

Reference ID

Planned * Actual

Execution * Results (Actual Amount entered manually by the user)

Cancel Save

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

Save the new performance measure.

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.

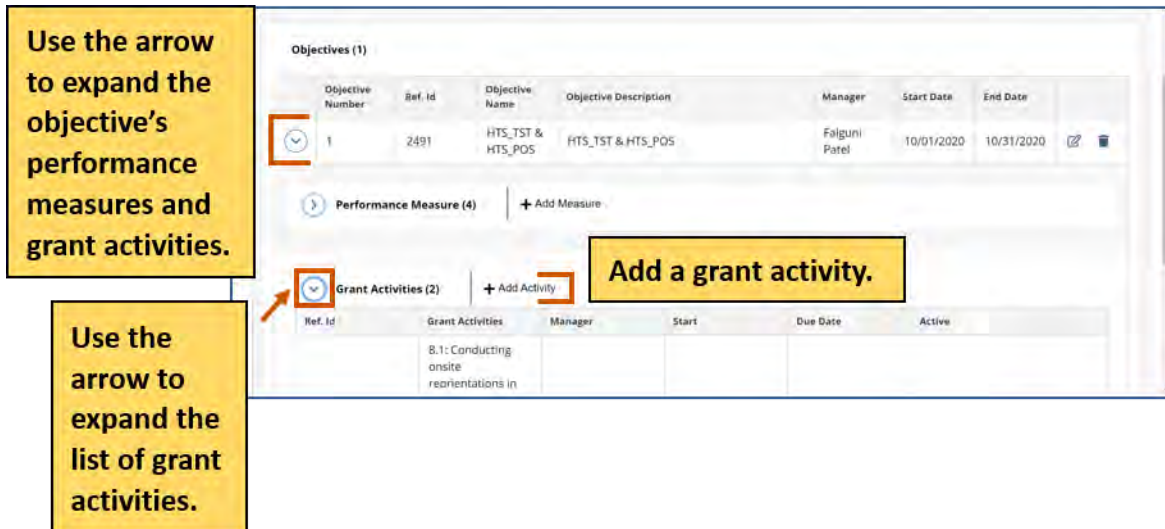


Figure 111: Add Activity

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.

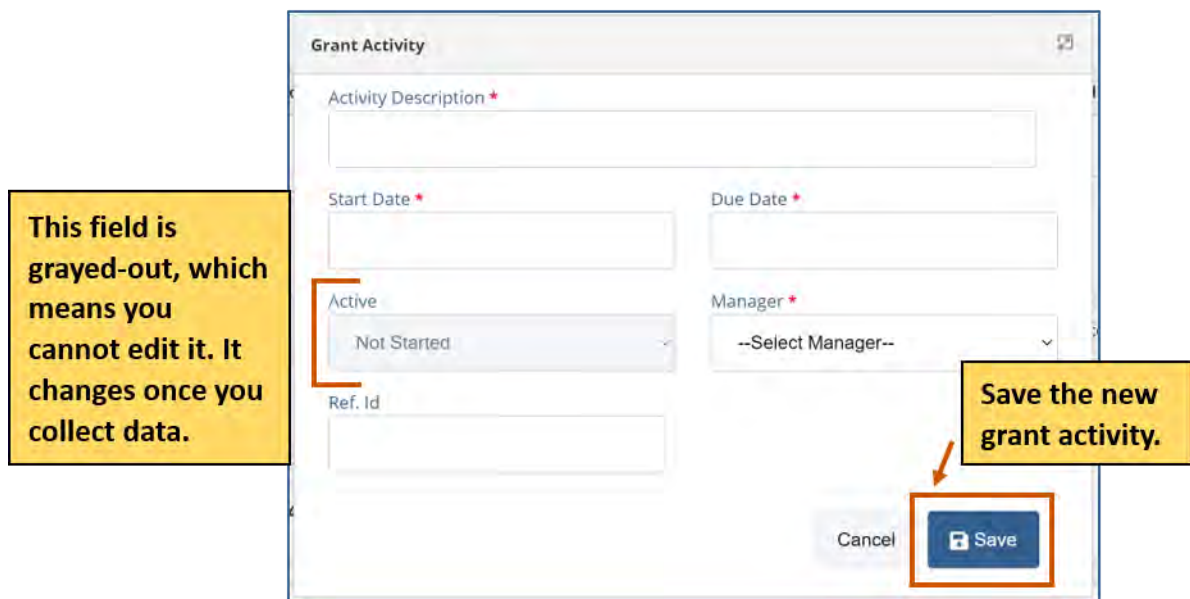




Figure 112: Grant Activity Dialog Box

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.

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.
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 *


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.

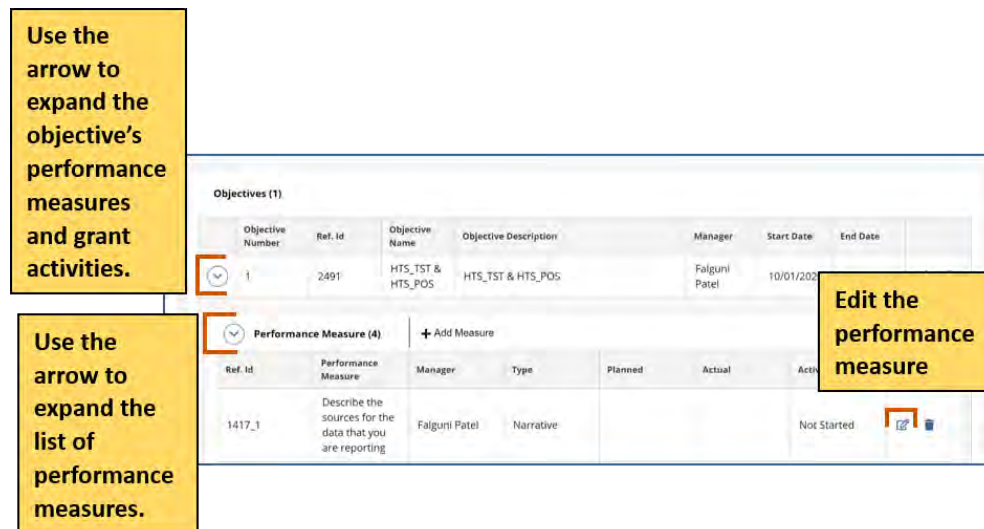

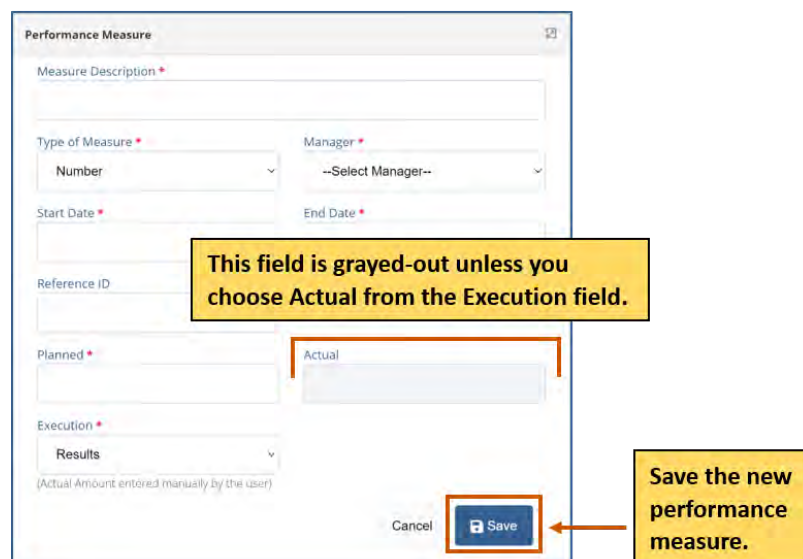


Figure 115: Edit Performance Measure


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



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. A yellow callout box states: 'This field is grayed-out unless you choose Actual from the Execution field.' (pointing to the Actual field). Another yellow callout box states: 'Save the new performance measure.' (pointing to the Save button). The 'Actual' field is highlighted with a red box.

Figure 116: Performance Measure Dialog Box

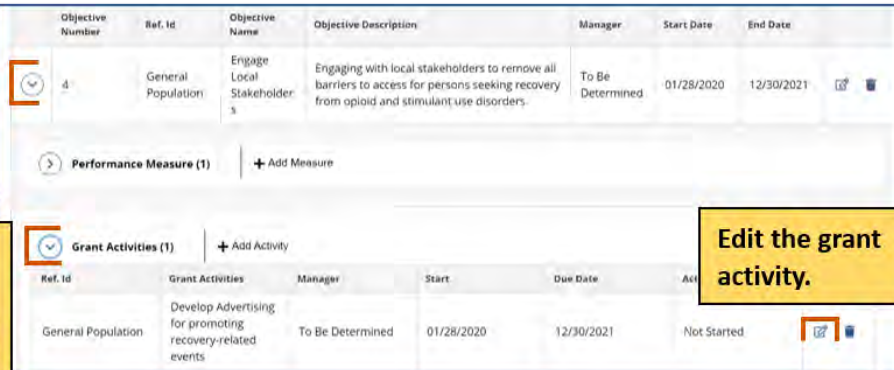
Edit a Grant Activity

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.

Use the arrow to expand the list of grant activities.


Edit the grant activity.



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

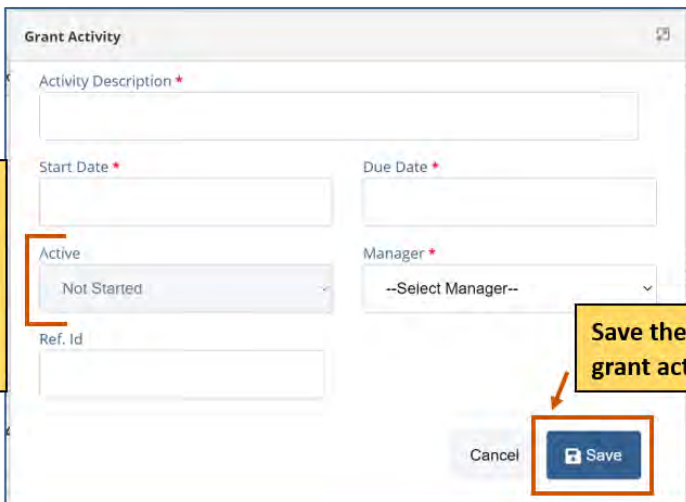
Ref. Id	Grant Activities	Manager	Start	Due Date	Act
General Population	Develop Advertising for promoting recovery-related events	To Be Determined	01/28/2020	12/30/2021	Not Started

Figure 117: Edit Grant Activity

6. Edit the necessary 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.

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

Save the new grant activity.



Grant Activity

Activity Description *

Start Date *

Due Date *

Active

Manager *

Ref. Id

Cancel

Save

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.

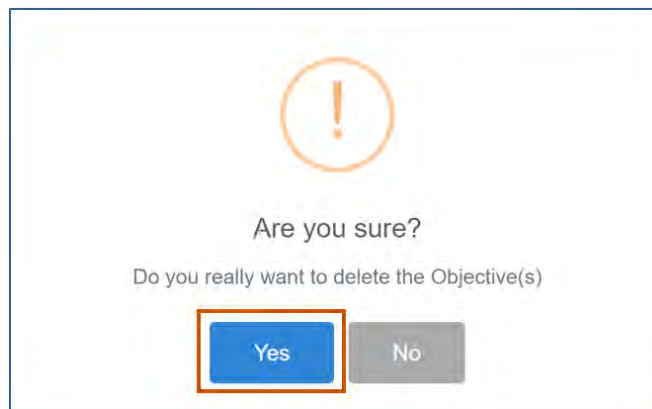



Figure 120: Warning to Delete Objective

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.

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

Use the arrow to expand the list of performance measures.

Delete the performance measure



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

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

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.

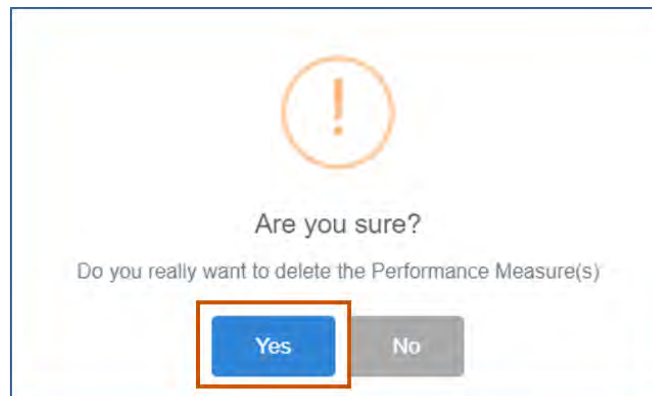





Figure 122: Warning to Delete Performance Measure

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.

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

Use the arrow to expand the list of 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

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

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'. To its right are 'Save Budget' and 'Budget Instructions' buttons. Below this is a table with columns: 'Budget Categories', 'Direct', 'Cash Match', 'In-Kind Match', 'Total', and 'Leveraged'. The table lists categories like 'BN Fringe', 'Supplies', 'Widgets', 'BN Laser Mouse', 'BN Widgets - other', and 'BN Supplies - other'. A 'Total' row is at the bottom. Callouts include: 'Use the drop-down list to choose a budget year.' pointing to the Year dropdown; 'View the Budget Instructions for specific guidelines to prepare your budget for submission.' pointing to the Budget Instructions button; 'Type in amount in cells that are white.' pointing to the white cells in the table; 'Budget tools' pointing to the table area; and 'Single-click the green BN symbol next to a category to display budget calculations and the budget narrative.' pointing to the 'BN' symbol next to 'Widgets - other'. An expanded view of the 'Widgets - other' category is shown below the table, listing sub-items like 'BN Laser Mouse', 'BN Widgets - other', and 'BN Supplies - other'.

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. Callouts include: 'Name of category.' pointing to the 'Project Director' entry; 'Budget calculations' pointing to the 'Budget Calculations' section; and 'Notes about the justification(s) for the change(s).' pointing to the 'Budget Narrative' section.

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.

The screenshot shows a table titled "Budget Categories" with columns: 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 highlights the "BN Widgets - other" row, and a yellow box with an arrow points to the green BN symbol next to it, stating: "Single-click the green BN symbol next to a category to display budget calculations and the budget narrative."

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

Figure 127: Add Budget Calculations and Narrative

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


Example dialog box

The dialog box titled "Budget Categories" contains the following fields:

- Budget Category (dropdown menu)
- Total Cost (\$ 0.00)
- Cash Match Funds (\$ 0.00)
- In-Kind Match Funds (\$ 0.00)
- Total Requested Amount (\$ 0.00)
- Budget Narrative (text area)

Buttons for "Cancel" and "Save" are at the bottom right.

Figure 128: Budget Categories Dialog Box

3. 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
Fringe	Displays the budget category	Displays the total amount of budget calculations	Total Cost: \$0.00 Cash Match Funds: \$100.00 In-Kind Match Funds: \$1,000.00 Total Requested Amount: \$0.00	Example test.
				Displays the budget narrative about the specific budget category

Figure 129: Save Budget Calculations and Narrative

Add a Parent Category

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

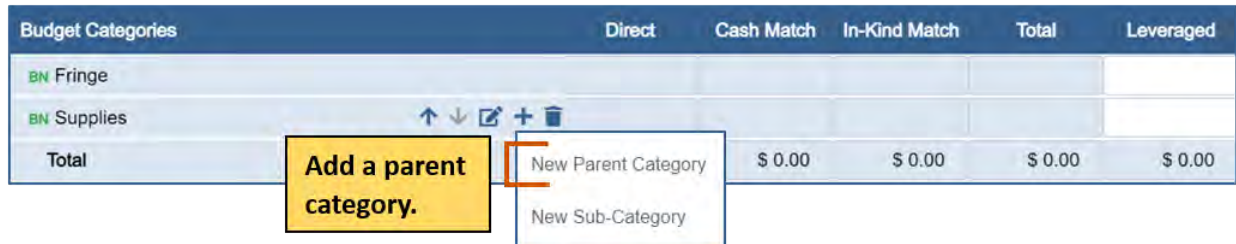



Figure 130: Add Parent Category

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

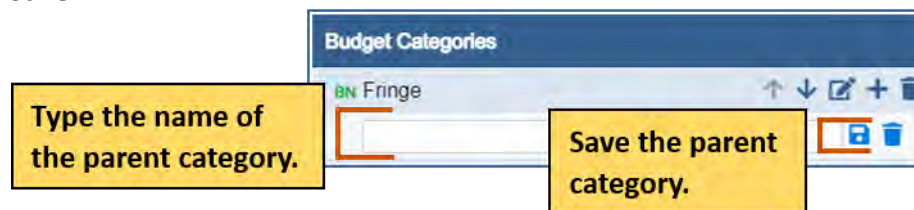


Figure 131: Save Parent Category

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.

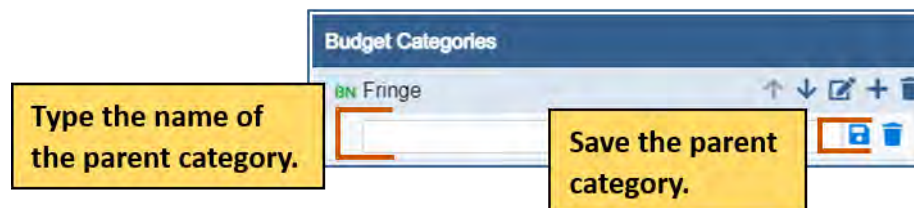



Figure 133: Save Parent Category

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.

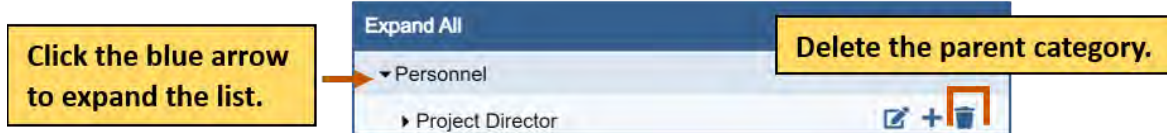


Figure 134: Delete Parent Category

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

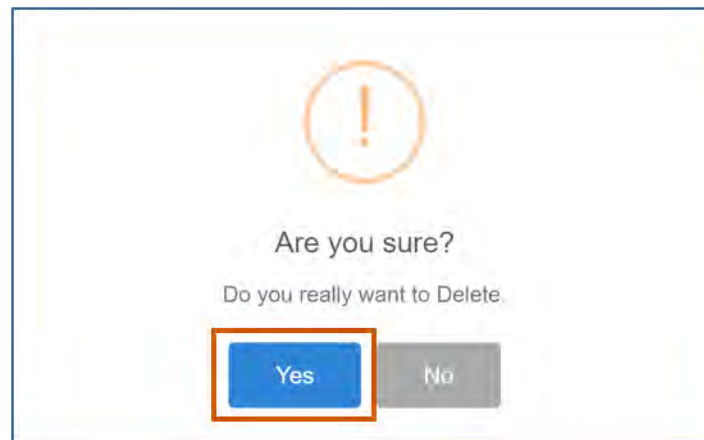


Figure 135: Warning to Delete Category

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**.

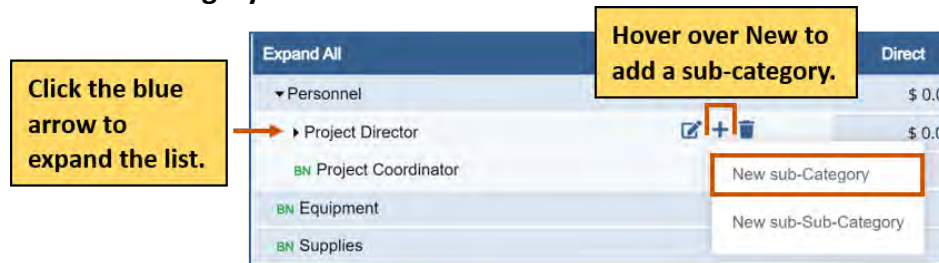



Figure 136: Add Sub-Category

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

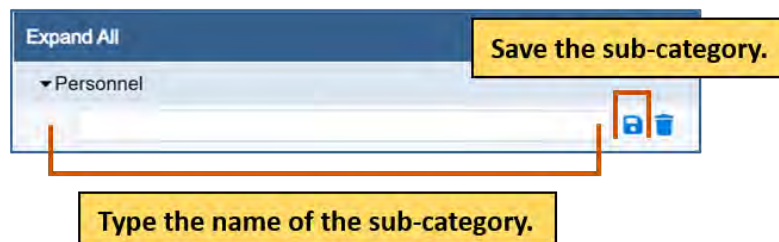



Figure 137: Save Sub-Category

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** .

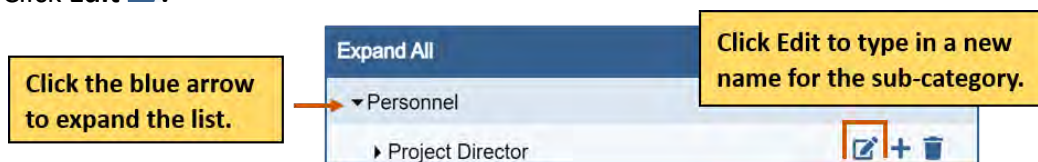



Figure 138: Edit Sub-Category

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

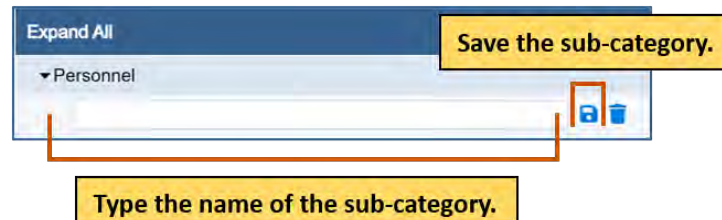


Figure 139: Save Sub-Category

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.

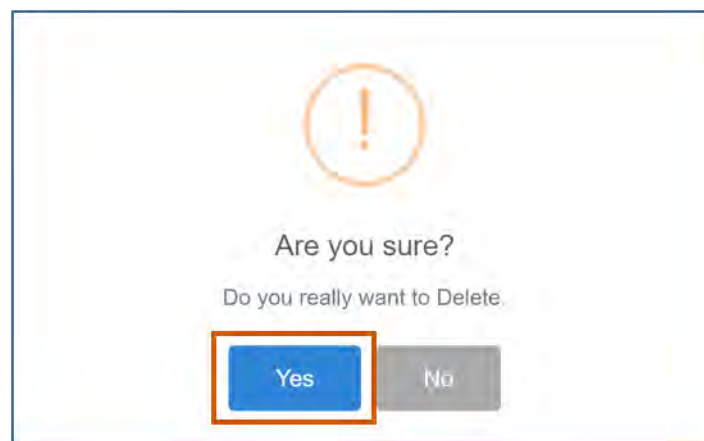


Figure 141: Warning to Delete Category

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.

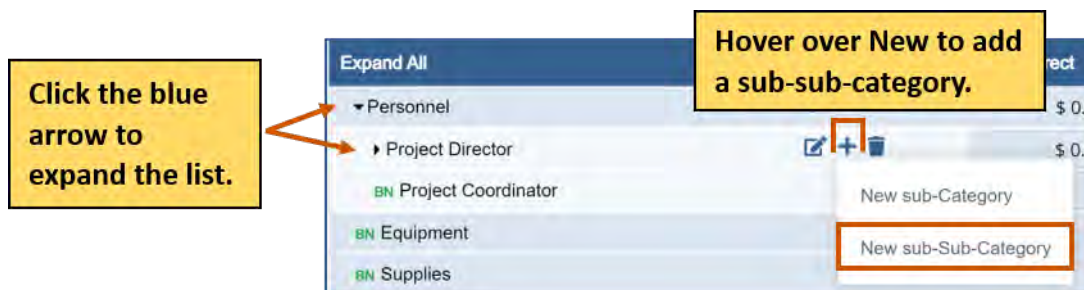



Figure 142: Add Sub-Sub-Category

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

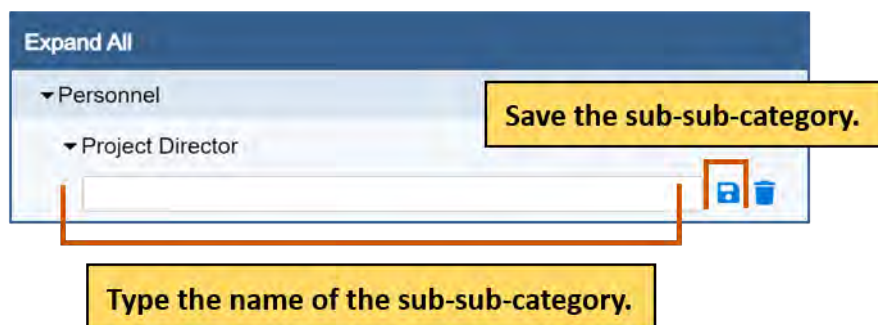


Figure 143: Save Sub-Sub-Category

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** .

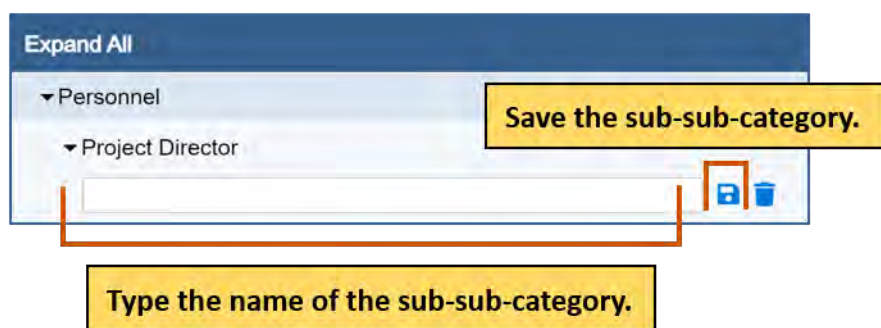


Figure 145: Save Sub-Sub-Category

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.

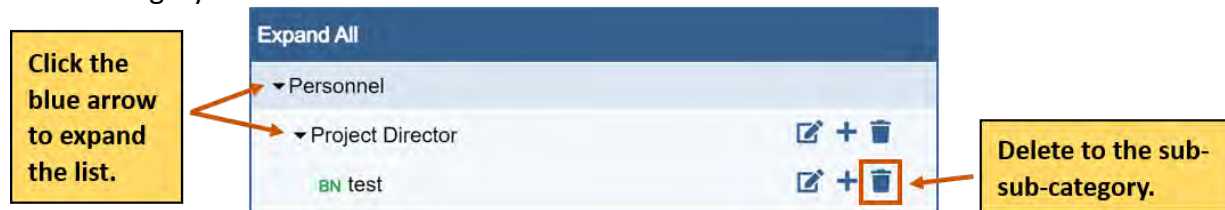


Figure 146: Delete Sub-Sub-Category

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

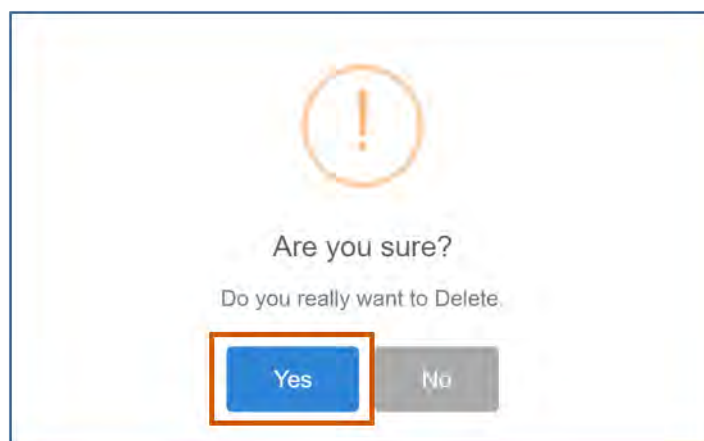


Figure 147: Warning to Delete Category

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