



GrantVantage

Training Series

Sub-Recipient User Guide





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GrantVantage Terms

Term	Definition
Assessment Setup	Where users can create profiles templates for Pre-Award Risk Assessments or Post-Award Monitoring Assessments.
Authorized Certifying Official	A user with this role is approved to submit and sign applications on behalf of the organization.
Award Category	The category best defining what the project is about - Are the funds being used for Education? Law Enforcement? Etc.
Award Type	Financial assistance that provides support or stimulation to accomplish a public purpose. Awards include grants and other agreements in the form of money or property in lieu of money, by the federal government to an eligible recipient. The term does not include: technical assistance, which provides services instead of money; other assistance in the form of loans, loan guarantees, interest subsidies, or insurance; direct payments of any kind to individuals; and contracts which are required to be entered into and administered under federal procurement laws and regulations.
Billing Address	The physical location to which a contact or organization may have assigned to a credit card or other banking or payment account.
CRM User	An individual with access to the GrantVantage system.
Description	The a small paragraph summarizing the purpose or summary of a contact, organization or other field within the system.
DUNS	Stands for Data Universal Numbering System. A 9-digit number uniquely identifying a business.
EIN	The Employer Identification Number (EIN), also known as the Federal Employer Identification Number (FEIN) or the Federal Tax Identification Number, is a unique nine-digit number assigned by the Internal Revenue Service (IRS) to business entities operating in the United States for the purposes of identification.
Email Correspondence	Using the Microsoft Outlook Connector, users may link emails from their Outlook inbox to specific projects or contacts. All linked emails appear in the Email Correspondence section of the project or contact.
FAIN Number	It is an acronym that stands for Federal Award Identification Number. Each Federal Agency must assign a unique FAIN to every financial assistance award starting October 2013. A FAIN is comprised of numbers and letters.
Fax	The fax number of the organization or contact
First Name	A personal name preceding the surname or hereditary or family name of an individual
Fund Code	A Fund Code is a value that identifies the source and intended purpose of funds and how they should be spent





GrantVantage Terms

Term	Definition
Grant Action	This determines if the grant is new, a continuation (competitive or non-competitive), an extension, or a revision.
Grant Type	The grant is either Construction or Non-Construction where Construction means the award is financing the construction of a building, park, monument or other structure.
Grantee Applicant	The name of the organization receiving award funds.
Grantee Department	The name of the department within an organization receiving award funds
Grantee Program Office	The name of the Program Office within an organization or department receiving award funds.
Grantee Type	The type of Grantee organization according to federal tax documents.
Last Name	The surname, hereditary, or family name following an individual's first or personal name
License Type	Indicates GrantVantage License types for internal users of the system.
Mailing Address	The physical location to which a contact or organization may receive packages or letters
Mailing Address 1	The first line of a physical mailing address.
Mailing Address 2	The second line of a physical mailing address.
Mailing Address 3	The third line of a physical mailing address.
Mailing City	The city where a physical mailing address is located.
Mailing Country	The country where a physical mailing address is located.
Mailing County	The county where a physical mailing address is located.
Mailing State	The state where a physical mailing address is located.
Mailing Zip Code	The zip code where a physical mailing address is located.
Mobile Phone	String of specific numbers that a telephone or cell phone user can dial to reach the contact's mobile or cell phone.
Notes & Attachments	Users may add Notes & Attachments to any Project, Organization, or Contact. Notes will record the date, time, and name of user who input the note.
Organization Name	The name of any business, non-profit or other entity.
Organization Type	The type of organization according to federal tax documents.





GrantVantage Terms

Term	Definition
Other Email Address	Any other electronic mailing ID associated with a contact
Other Related Contact	A contact indirectly associated to an organization. Example: A former employee
Parent Organization	An organization in ownership of another organization or, as is the case in many government agencies, an office or department overseeing another program organization. Examples: 1. Yum! Brands is the Parent Organization to KFC 2. Health and Human Services is the Parent Organization to the Administration for Children and Families
Partner	Any organization providing funds to the project in the form of Cash Match or In-Kind. Partners may also be assigned Objectives, Performance Measures and Activities.
Performance Area	Text field for users to customize or modify the Performance Type of a project
Phone Number	String of specific numbers that a telephone or cell phone user can dial to reach a contact or organization. In the US, a phone number consists of 10 numeric digits, and sometimes requires dialing a 1 (the US country code) before the 10 digits
Primary Contact	A contact directly associated to an organization. Example: An employee or owner of an organization
Primary Grantee Department Director/Manager	A contact or user with a Director or Manager title associated with the project.
Primary Grantee Project Manager/Coordinator	A contact or user with a Manager or Coordinator title associated with the project.
Primary Grants Compliance Officer	A contact or user responsible for ensuring all money and all actions associated with the grant or project stay within all regulations and rules of the award.
Primary Organization	An organization directly associated to a contact. Example: Contact's employer
Project Goal	The overarching goal of a specific project or grant. A goal encompasses all objectives in its statement.
Project-Specific Permissions	Privileges relating to a specific project. These permissions include performance, financial, and other project data.
Project Summary/Abstract	A narrative describing the purpose and/or need of the project.



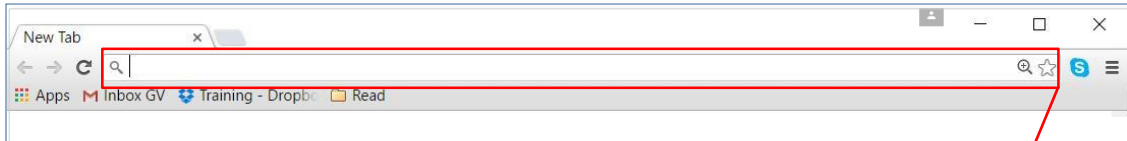


GrantVantage Terms

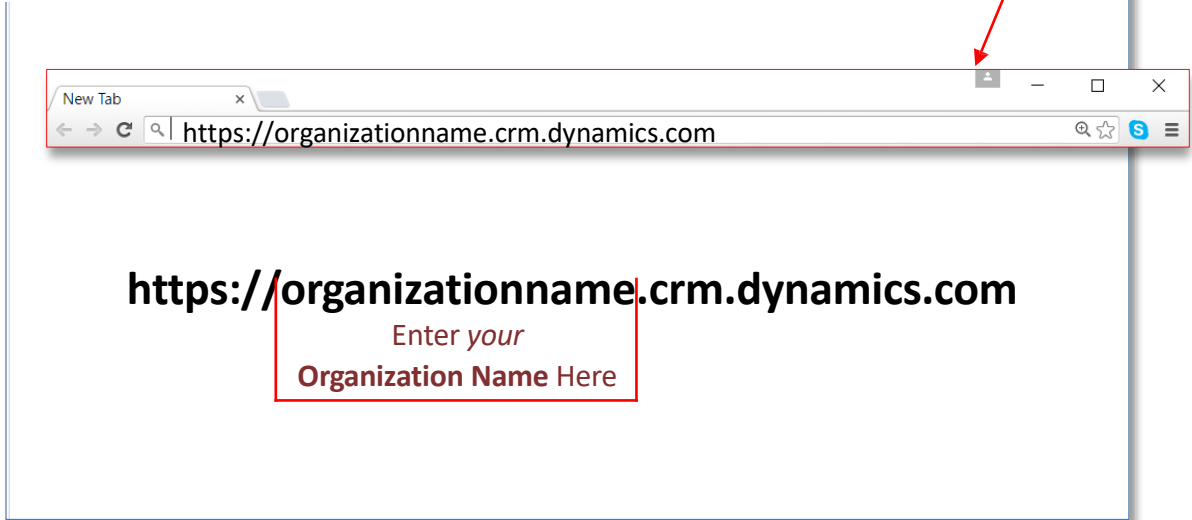
Term	Definition
Related Organization	An Organization indirectly associated with a contact. Example: Organization contracting out to contact
Report Lag Time	The number of days between the time a reporting period ends and the report for that same period is due.
Revenue Source	Any funder providing money to the project in the form of Direct Funding.
Specify Other Type	If "Other" is selected for Organization Type, this field will unlock enabling the user to enter a custom Organization Type.
Sub-Project	Any organization receiving funding or assigned objectives, performance measures, or activities from a funding project. This project will have a connected budget and users will be able to assign down performance data. Sub-Projects will be linked with their Parent or Primary projects and display underneath the Parent or Primary project on the Home Page Dashboards.
System-wide Permissions	Privileges giving a user access to removing access from aspects of the system existing outside of a specific project. These include profiles, templates, and imported transactions.
Title	A descriptive name applying to an individuals job or position. In reference to Notes & Attachments: The heading of a note
To-Do List	A list of all email correspondence and sub-activity appointments and tasks assigned to a specific users. The My Activities page of the To-Do List will only show sub-activity tasks and appointments and/or email correspondence to which the logged in user is assigned.
User Permissions	Privileges given to a user, dictating what can or cannot be done in the GrantVantage system.
Website Address	The URL of an organization's website



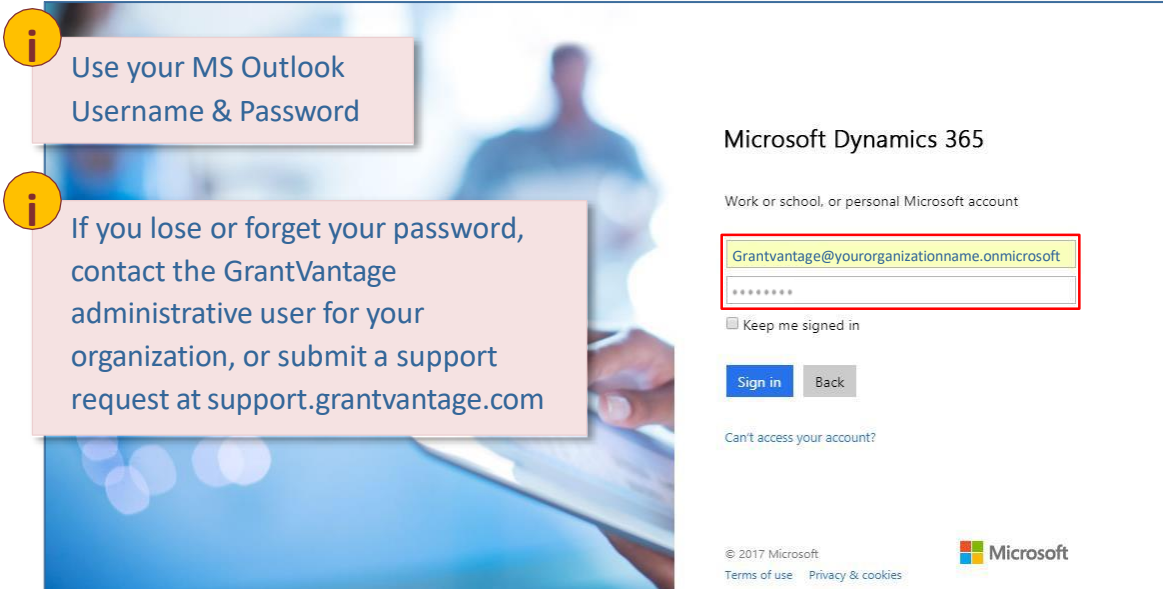
- 1 Open a preferred Web Browser (Microsoft Edge, Google Chrome, etc.)



- 2 In the URL field of the web browser window, enter the web address provided by GrantVantage



- 3 Enter the login credentials provided by GrantVantage, then select Sign in





This is the **GrantVantage Home Page**



GrantVantage	GrantVantage Menu
My Projects	Projects assigned to user
	Search GrantVantage using keywords
	Recently Viewed items in GrantVantage
	Quick Create: To easily create & assign project records & sub-activities
	Advanced Find: An in-depth search engine for GrantVantage data (Administrative Users Only)
	CRM Settings (not for GV Users)
	GrantVantage Helpdesk
	User ID – select to sign out of GrantVantage

The diagram illustrates navigation options from the GrantVantage Home Page. It shows the 'GrantVantage' and 'My Projects' tabs at the top. Below the 'My Projects' tab, there's a 'Settings' button. A callout box shows three ways to return to the Home Page: 1. Clicking the 'GrantVantage' button. 2. Clicking the 'My Projects' button. 3. Clicking the 'My Projects' button in the bottom navigation bar. A final box states: 'Return to GrantVantage Home Page & Dynamic Dashboards'.



Project List

Use the Display Options picklist sort the display by Project, by Program or by Fund

Then sort projects by Active, Draft, Pending, Close-Out, Archived & All Projects

Single-Click the name of a project to view related Dashboards & Project Details

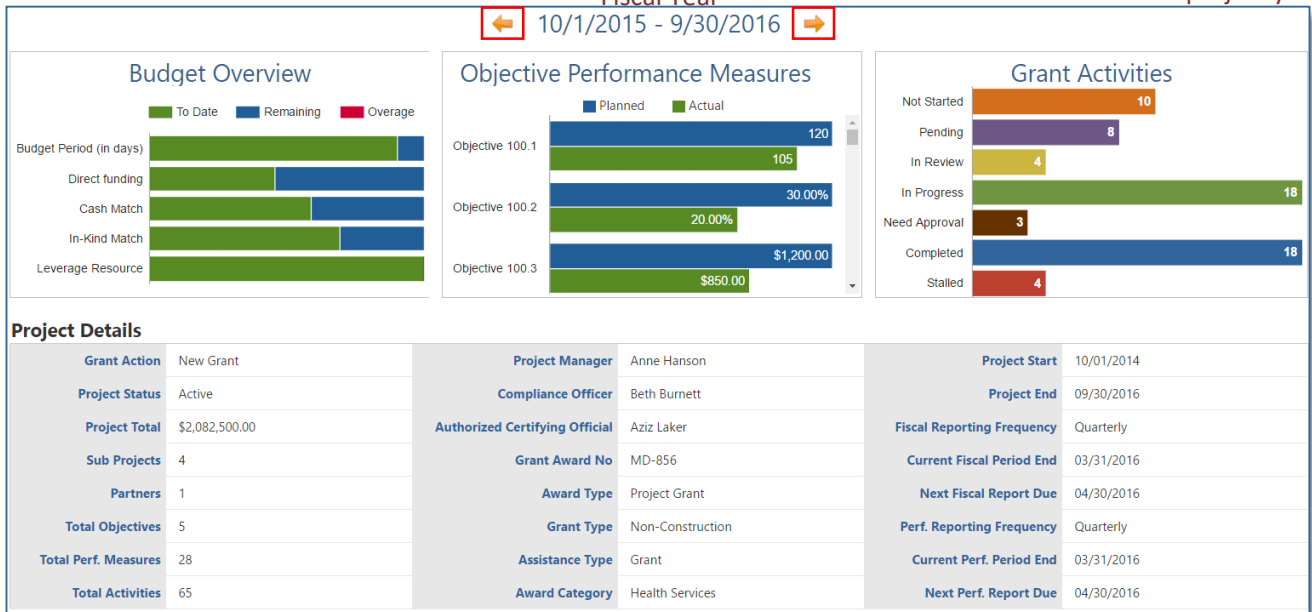
Double-click the name of a project to open it for management

Select this arrow to expand project to view Sub-Projects

The Dashboards & Project Details

Fiscal Year

Select these arrows to view other project years



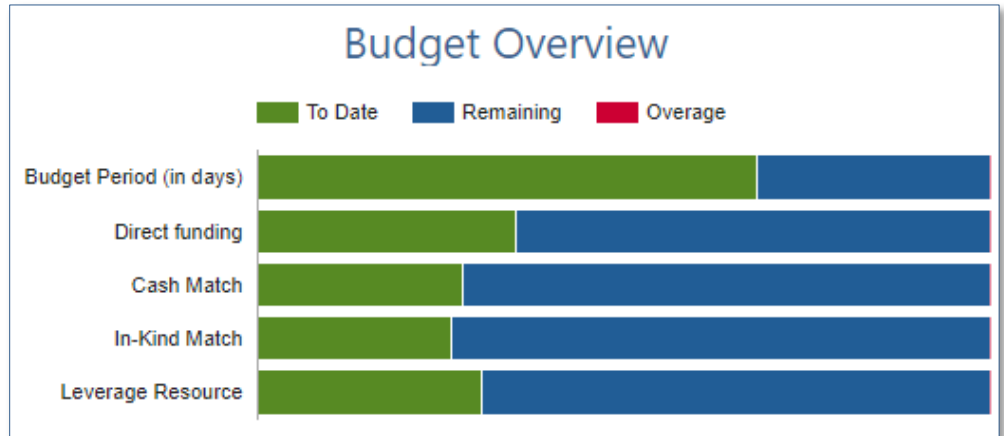
Budget Overview	Real-time overview of current Grant Budget progress (hover over to see details)
Object Performance Measures	Real-time overview of the progress of Performance Measures & Objectives (hover over to see details, single-click to update)
Grant Activities	Real-time overview of Grant Activities at each stage of completion (single-click to view details & update)
Project Details	Overview of project details & information



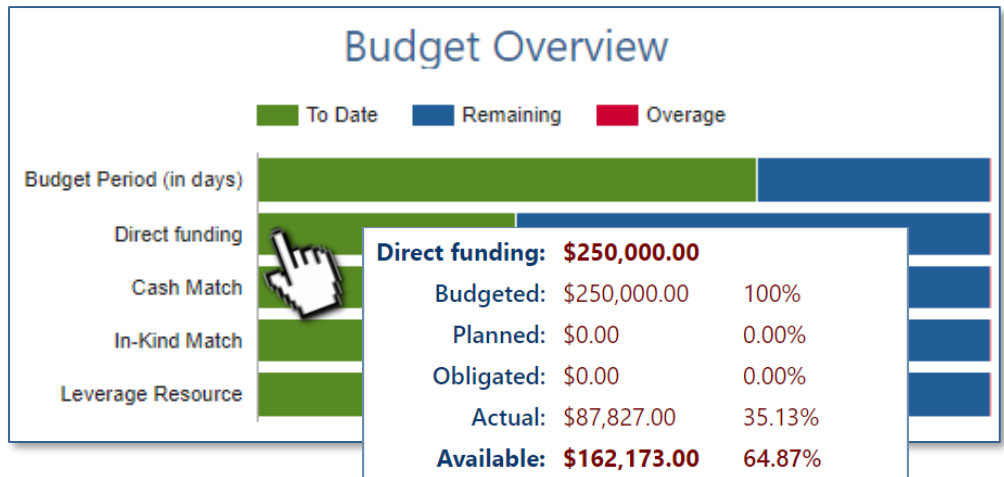


The Budget Overview Dashboard

Displays an up-to-date overview of current grant budget progress



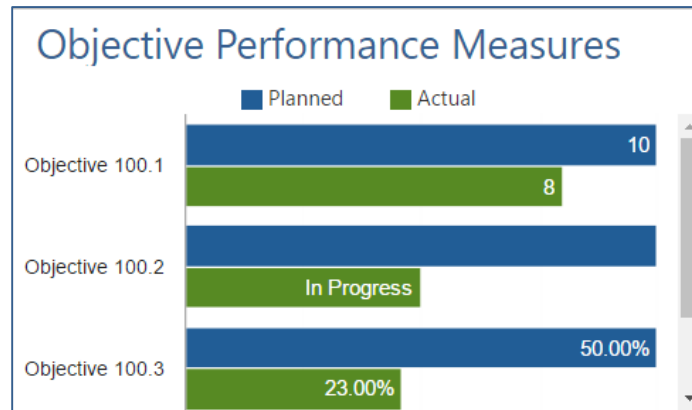
To view details, hover your mouse cursor over the row you wish to view





The Objective Performance Measures Dashboard

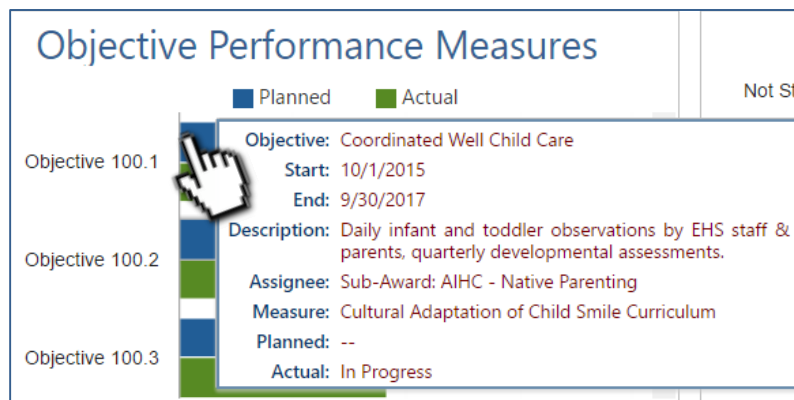
Displays an up-to-date overview of Objective & Performance Measure progress



To view details, hover your mouse cursor over the row you wish to view

Blue represents Planned Performance Measures

Green represents actual Performance Measure progress

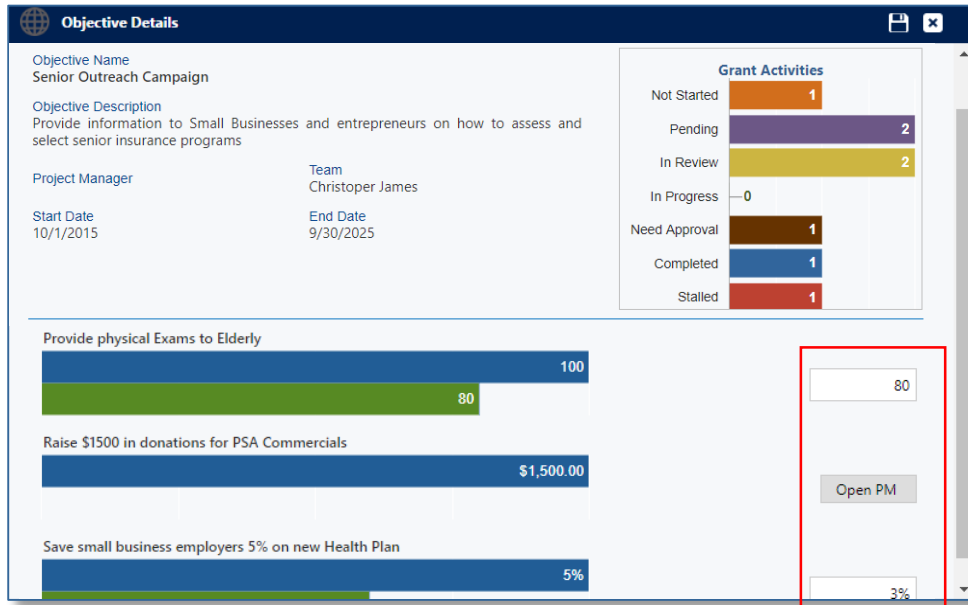


To update grant progress from the Objective Performance Measures Dashboard, single-click the Performance Measure you wish to update



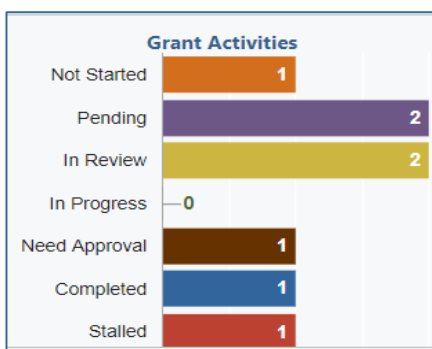
The Objective Performance Measures Dashboard

This is the **Objective Details Window**



Open PM

Select to open Performance Measure Details in a new window

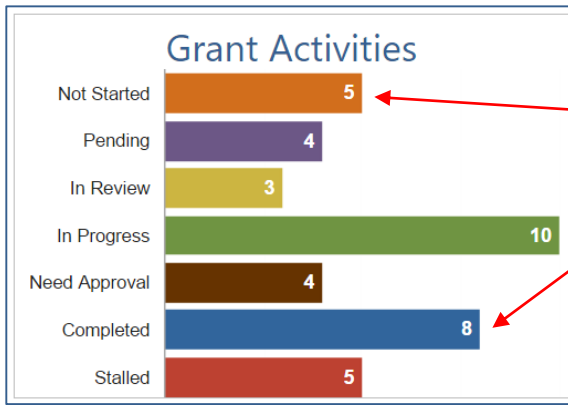


Activities listed in the Objective Details window are activities *specifically related to that Objective*



The Grant Activities Dashboard

Displays an up-to-date overview of Grant Activity progress



These numbers indicate how many Grant Activities exist at each stage of completion

To update the status of Grant Activities from the Grant Activities Dashboard, select the status of the Activity you wish to change

This is the **Activity Details Window**

Use these arrows to navigate between Activities
(Sorted by Status)

Grant Activity - In Progress

Prev ↑ Next ↓

Activity Description	Owner	Due Date
Host Mental Health Community Outreach/Awareness Night	Benjamin Arnold	9/30/2025
Attend Family Counseling for Mental Health Sessions	Benjamin Arnold	9/30/2025
Provide Flu Vaccines to Clark County residents	Gary Redfire	9/30/2025
Provide local media outlets with digital and print materials for dissemination	Gary Redfire	9/30/2025

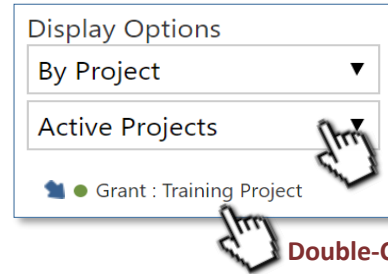
- Grant Activity Details** View or edit Activity Details, update Activity Status, or assign Activity to other Users
- Notes & Attachment** Add notes or attach documents related to selected Activity
- Sub-Activities** Add & assign Sub-Activities (Appointment, Recurring Appointment or Task)





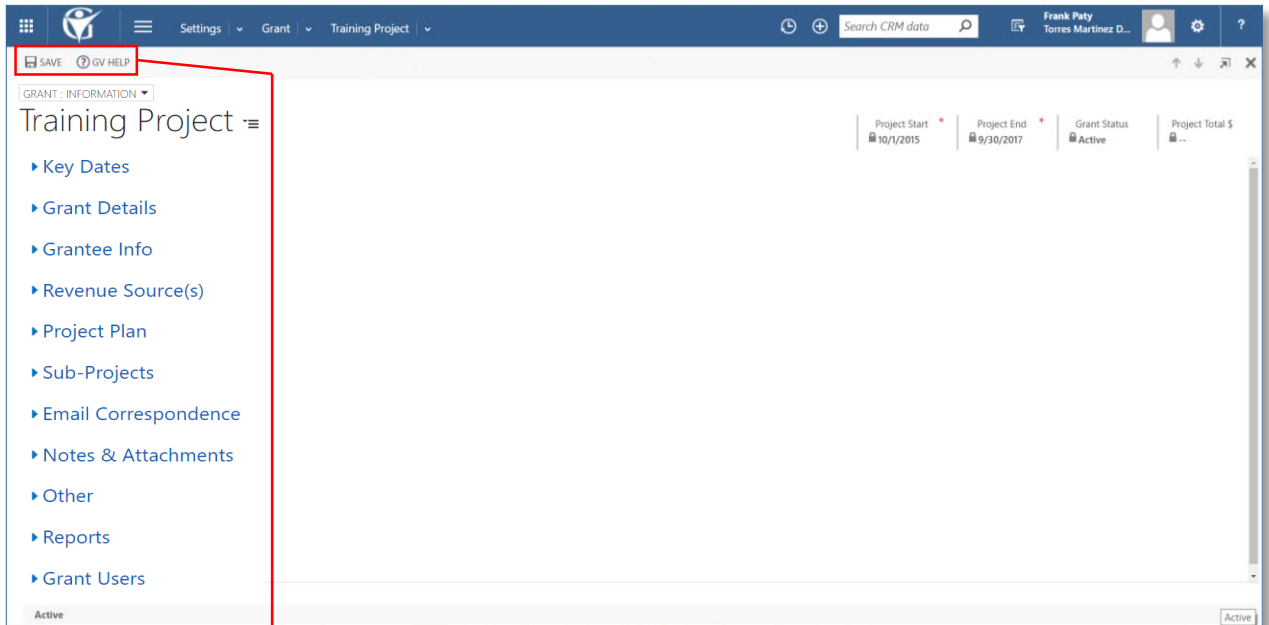
Once a project has been *activated* by an authorized user, it can be accessed by selecting **Active Projects** in the Project List on the GrantVantage Home Page

To open a specific active project, double-click the Project Name in the Project List
This will open the **Project Form** of the selected Project



The Project Form

The Project Form is the primary information & management page for a project, reflecting the information & data entered in The Grant Wizard and Project Budget



The White Ribbon Bar



Save	Save any changes made within the Project Form
GV Help	Access the GrantVantage Online Helpdesk





GRANT : INFORMATION ▾

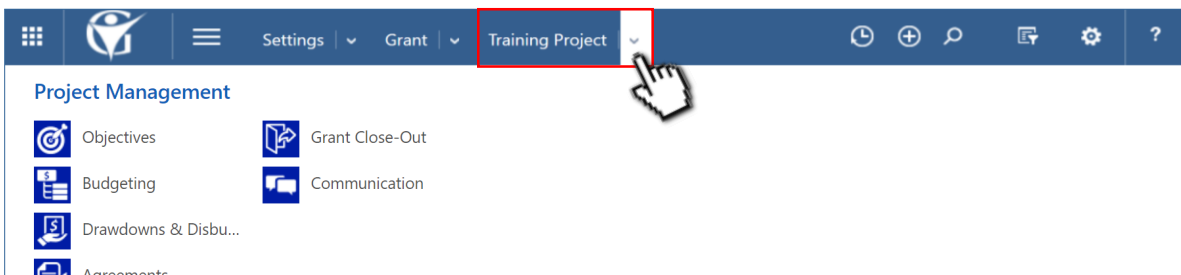
Training Project ▾

- ▶ Key Dates
- ▶ Grant Details
- ▶ Grantee Info
- ▶ Revenue Source(s)
- ▶ Project Plan
- ▶ Sub-Projects
- ▶ Email Correspondence
- ▶ Notes & Attachments
- ▶ Other
- ▶ Reports
- ▶ Grant Users

Key Dates	Important Timeline & Reporting date information
Grant Details	Award Number & Award Type Information
Grantee Info	Grantee Organization & Project Personnel
Revenue Source(s)	Sources of Funding & Partner Information
Project Plan	Project Goal & Summary/Abstract
Sub-Projects	View, add or modify Sub-Projects & Contracts information
Email Correspondence	Emails Associated with this project
Notes & Attachments	View or add notes or attach documents
Other	Congressional District information
Reports	Pending & submitted Financial & Performance Reports
Grant Users	Contacts/Staff associated specifically with the project

2 The Project Management Menu

Located on the Blue Ribbon Bar of an open project, it allows users to access & manage the other pages of the project



Project Management

- Objectives
- Budgeting
- Drawdowns & Disbu...
- Agreements
- Assessment
- Reports
- Grant Close-Out
- Communication

Objectives	Manage Project Objectives, Performance Measures & Activities
Budgeting	Manage Project, Sub-Project budgets & transactions
Drawdowns & Disbursements	Funding Drawdown, Disbursement & Reimbursement records
Agreements	Index of project documents & Document Template Tool
Assessment	Manage Project Assessments & Assessment Profiles
Reporting	Manage, track & export all Project Performance & Financial Reports
Grant Close-Out	May not have User Access
Communication	May not have User Access





1

- Open the Project for which you will be creating a budget
- In the Project Menu on the Blue Ribbon Bar, select **Budgeting**
- Under the Project Title, select **Create Budget**

Project Management

- Objectives
- Budgeting**
- Drawdowns & Disbu...
- Agreements
- Assessment
- Reports

Grant Close-Out

Communication

Settings | Grant | Training Project

Project Start: 1/1/2015

Project End: 9/30/2017

Grant Status: Draft

Project Total \$

CREATE BUDGET

No budget exists for this project. Please click "Create budget" above.



Selecting **Create Budget** allows GrantVantage to create the framework of the project budget and prompts the **Budget Properties** form

2

Budget Properties

Budget Setup

Budget Properties | Budget Years

	Direct	Cash Match	In-Kind
Annual Budget Tolerance	0%	0%	0%

Round IDC: No Rounding

☐ Source Allocation By Transaction


☐ Source Allocation By Budget Category

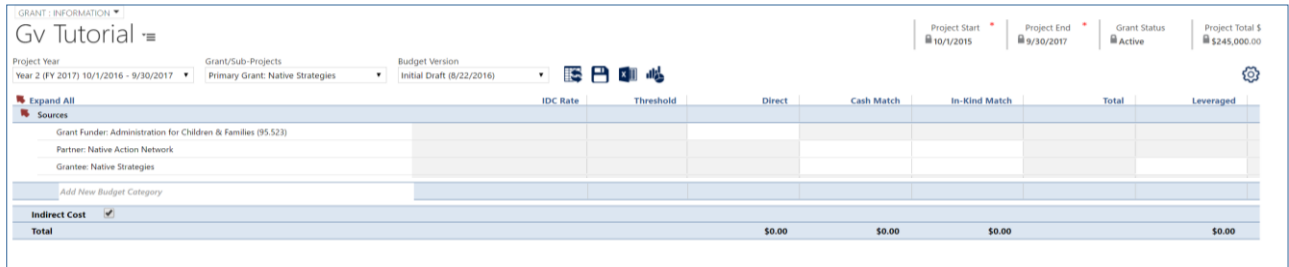
☐ Specify Objective Allocations

Annual Budget Tolerance	The reallocation of funds between expenses allowed before a revision draft must be created
Rounding of the IDC	(Indirect Cost Rate) Determines how the IDC will calculate and display. IDC values can round to the nearest whole number, the nearest tenth of a decimal or no rounding
Specify Allocations by Transaction	Allows users to relate funders to specific transactions
Specify Allocations by Budget Category	Allows users to relate funders to budget categories
Specify Objective Allocations	Allows users to relate objectives to funders and transactions

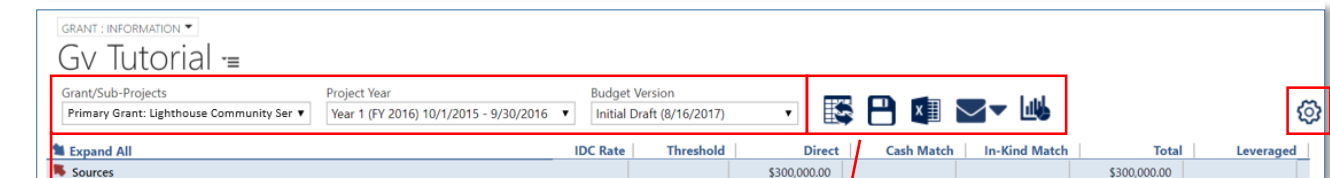










- 3 Once all budget properties have been determined, select . The project budget will display as an **Initial Draft**. Budget categories and budget values may now be entered



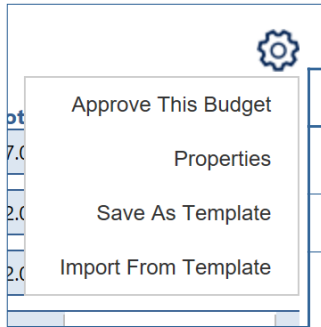
- 4 The **Budget Menu**, located above the budget, enables user to sort budgets by project year & version, refresh the budget, save the budget, export the budget, and view budget graphs



Grant/Sub-Projects	Project Year	Budget Version
Navigate between Grant & Sub-Project Budgets	Navigate between Grant Budget Years	Navigate between Budget Draft Versions: Initial Draft, Revision Draft, and Approved

	Refresh	Select when switching between budget pages & to view any newly saved changes
	Save	Select anytime changes are made to a budget
	Export to Excel	Export current page as MS Excel spreadsheet
	Messaging	View or Send Messages regarding current Budget
	Sources vs. Allocation	View <i>Budgeted</i> vs. <i>Actual</i> graphs & charts
	Budget Settings	To view/change budget settings



**Draft Budget Settings****Approve This Budget**Change from Draft to Approved Budget
(Administrative Users only)**Properties**

View Budget Properties

Save as Template

Save current budget as a template, to be used in other project budgets

Import From Template

Import existing Template Budget



The **Sources** section of funding populates automatically, based on Revenue Source and Partner information entered by an Administrative User

GRANT : INFORMATION

Gv Tutorial

Grant/Sub-Projects

Primary Grant: Lighthouse Community Ser

Project Year

Year 1 (FY 2016) 10/1/2015 - 9/30/2016

Budget Version

Initial Draft (8/16/2017)

Project Start

10/1/2015

Project End

9/30/2019

Grant Status

Draft

Project Total \$

\$600,000.00

Print

Save

Excel

Email

Help

Settings

Expand All	IDC Rate	Threshold	Direct	Cash Match	In-Kind Match	Total	Leveraged
Sources			\$300,000.00			\$300,000.00	
Fund: 2015 Fund (98.568)			\$260,000.00			\$260,000.00	
Fund: 2016 Fund (98.568)			\$40,000.00			\$40,000.00	
Grantee: Lighthouse Community Services							





Program Categories: Enables users to segment **Source** funds into secondary categories (Administration, Implementation, etc) prior to allocating expenses

- 1 The first step to entering a budget is to enter **Program Categories**.
Hover the cursor over the source to which a Program Category will be added,
Select **+** then select **New Program Category**

GRANT : INFORMATION ▾

Gv Tutorial ▾

Budget Version
Initial Draft (8/22/2016)

Project Year
Year 2 (FY 2017) 10/1/2016 - 9/30/2017 ▾

Primary Grant: Native Strategies ▾

Initial Draft (8/22/2016)

Expand All

Sources	IDC Rate	Threshold	Direct	Cash Match
Grant Funder: Administration for Children & Families (95.523)				
Partner: Native Action Network				
Grantee: Native Strategies				

- 2 To add a Program Category, begin by entering the Category Name directly into the **Enter Program Category** field

Project Year
Year 2 (FY 2017) 1/1/2017 - 12/31/2017 ▾

Grant/Sub-Projects
Primary Grant: Google Ads ▾

Expand All

Sources
Grant Funder: Administration for Children & Families (95.523)
Enter Program Category
Partner: Native Action Network

- 3 While Typing the Category Name, the field will display a list of suggested categories already existing in the database. If the desired category already exists in GrantVantage, select it from the list.
If the Program Category is does not exist in the system, select the Save icon to the right of the field and GrantVantage will add it to the database.

To delete a budget category select

Admini

Administration



Enter a Draft Budget: Budget Categories

- 1 The first step to entering a budget is to enter **Budget Categories**

GRANT : INFORMATION ▾
Gv Tutorial ▾

Project Year: Year 2 (FY 2017) 10/1/2016 - 9/30/2017
Budget Version: Initial Draft (8/22/2016)

Project Start: 10/1/2015
Project End: 9/30/2017
Grant Status: Active
Project Total \$: \$245,000.00

	IDC Rate	Threshold	Direct	Cash Match	In-Kind Match	Total	Leveraged
Sources							
Grant Funder: Administration for Children & Families (95.523)							
Partner: Native Action Network							
Grantee: Native Strategies							
Add New Budget Category							
Indirect Cost <input checked="" type="checkbox"/>							
Total			\$0.00	\$0.00	\$0.00		\$0.00

- 2 To add budget categories, begin by entering the Category Names directly into the **Add New Budget Category** field

Expand All

Sources

Add New Budget Category

Indirect Cost ☒

Total

- 3 While typing the Category name, the field will display a list of suggested categories already existing in the database. If the desired category already exists in GrantVantage, select it from the list. To create a *new* Category, type it in the **Add New Budget Category** field and select save.

Personne

Non-Personnel Costs

Personnel

- 4 To add additional Parent or Sub-Categories, select the **+** symbol on the newly-created Parent Category then select the desired category type.

Select the on the Category line to delete. **Don't forget to always save in between changes!**

	IDC Rate	Threshold	Direct	Cash Match	In-Kind Match	Total	Leveraged
Personnel							
Fringe Benefits							
Supplies						10.00%	
Travel						10.00%	
Indirect Cost <input checked="" type="checkbox"/>							
Total							





- 5 To adjust the order of selected budget categories, select the blue arrows on the Category line

Expand All	IDC Rate
Media	
Supplies	

Enter a Budget: Budget Values

- 1 Once all categories are added and saved to the budget, budget values may be entered. Enter values into the white boxes of each row.

GRANT INFORMATION		Project Start 10/1/2015		Project End 9/30/2017		Grant Status Active		Project Total \$245,000.00	
Gv Tutorial		Budget Version Initial Draft (8/22/2016)							
Project Year Year 2 (FY 2017) 10/1/2016 - 9/30/2017									
Expand All		IDC Rate	Threshold	Direct	Cash Match	In-Kind Match	Total	Leveraged	
Sources				\$200,000.00	\$25,000.00	\$20,000.00	\$245,000.00	\$5,000.00	
Grant Funder: Administration for Children & Families (95.523)				\$200,000.00			\$200,000.00		
Partner: Native Action Network					\$15,000.00	\$10,000.00	\$25,000.00		
Grantee: Native Strategies					\$10,000.00	\$10,000.00	\$20,000.00	\$5,000.00	
Sub-Awardee Match									
Contractor Match									
Personnel				\$90,000.00	\$19,500.00		\$109,500.00		
Project Manager		10.00%		\$51,500.00	\$8,000.00		\$59,500.00		
Project Assistant		10.00%		\$38,500.00	\$11,500.00		\$50,000.00		
Personnel - other									
Fringe Benefits		10.00%		\$20,000.00	\$1,500.00		\$21,500.00		
Supplies		10.00%		\$20,682.00	\$4,000.00	\$10,000.00	\$34,682.00	\$5,000.00	
Travel		10.00%		\$19,318.00		\$10,000.00	\$29,318.00		
Indirect Cost				\$15,000.00			\$15,000.00		
Total				\$200,000.00	\$25,000.00	\$20,000.00	\$245,000.00	\$5,000.00	

- 2 Once a value is entered into any budget field under Direct, Cash Match, In-Kind or Leveraged Resources, a new window will appear, enabling users to enter Source/Program Category and/or Objective Allocations

Source and Objective Allocation					
Budget Category: Fringe Benefits			Budget Amount: \$5,000.00		
Source Type: Direct					
Budget Category Allocations			Budgeted	Balance	Amount
Source/Program Category	Grant Funder: Amarillo Independent School District - Am	\$0.00	→	(\$5,000.00)	5000.00
Objective	1 : Objective Name 1	\$5,000.00			
+ Add Allocation			Remaining Balance: \$0.00		





- 3 Select **+ Add Allocation** to allocate funds to multiple Sources or Program Categories and Objectives. Users may only save budget allocation information once the **Remaining Balance** equals **\$0.00**

Source and Objective Allocation

Budget Category: Fringe Benefits Budget Amount: \$5,000.00

Source Type: Direct

Budget Category Allocations	Budgeted	Balance	Amount
Source/Program Category: Grant Funder: Amarillo Independent School District - Am	\$0.00	→ (\$3,000.00)	\$3,000.00
Objective: 1 : Objective Name 1	\$3,000.00		
Source/Program Category: Grant Funder: Amarillo Independent School District - Am	\$0.00	→ (\$5,000.00)	\$2,000.00
Objective: 2 : Objective Name 2	\$2,000.00		

+ Add Allocation Remaining Balance: \$0.00

- 4 The **IDC Rate** values entered for each budget category will calculate at the bottom of the budget when the checkbox is marked.

Unselect the Indirect Cost checkbox to *manually* enter the Indirect Cost values.

When transactions are entered, GrantVantage calculates the IDC rate based on the predetermined IDC percentage for each category. This is reflected in the Transaction Detail Report.

Threshold: The maximum monetary value that will be calculated for each budget category's IDC rate

GRANT : INFORMATION

Gv Tutorial

Project Year: Year 2 (FY 2017) 10/1/2016 - 9/30/2017 Budget Version: Initial Draft (8/22/2016)

	IDC Rate	Threshold	Direct
Sources			\$200,000.00
Grant Funder: Administration for Children & Families (95.523)			\$200,000.00
Partner: Native Action Network			
Grantee: Native Strategies			
Sub-Awardee Match			
Contractor Match			
Personnel			\$90,000.00
Project Manager	10.00%		\$51,500.00
Project Assistant	10.00%		\$38,500.00
Personnel - other			
Fringe Benefits	10.00%		\$20,000.00
Supplies	10.00%		\$20,682.00
Travel	10.00%		\$19,318.00
Indirect Cost <input checked="" type="checkbox"/>			\$15,000.00
Total			



Don't forget to save anytime changes are made!





Approved Budget Settings

Create Revision Draft
Request Budget Change
View Change Requests
Properties
Save As Template

Create Revision Draft	Generates editable Revision Draft of Budget
Request Budget Change	Request changes to an approved budget
View Change Requests	View submitted Budget Change Requests
Properties	View/edit Budget Properties
Save as Template	Save current Budget as Template for later use



The ability to create Revision Drafts or to submit Budget Change Requests is permission-based and can only be applied to *approved* budgets



Add Transactions within Budgeting Page

1

To record transactions in a budget, locate the **Budget Category** & right click on the dollar value against which the transaction will be applied

Select New Transaction

GRANT : INFORMATION ▾

Gv Tutorial ▾

Project Year: Year 1 (FY 2016) 10/1/2015 - 9/30/2016 ▾ Grant/Sub-Projects: Primary Grant: Native Strategies ▾ Budget Version: Approved Revision (8/26/2016) ▾

Project Start: 10/1/2015 Project End: 9/30/2017 Grant Status: Active

	IDC Rate	Threshold	Direct	Cash Match	In-Kind Match	Total
Sources			\$200,000.00	\$25,000.00	\$20,000.00	\$245,000.00
Contracts			\$15,000.00			\$15,000.00
Sub-Awards			\$20,000.00			\$20,000.00
Personnel			\$90,000.00	\$19,500.00		\$109,500.00
Fringe Benefits	10.00%		\$20,000.00	\$1,500.00		\$21,500.00
Supplies	10.00%		\$20,682.00	\$4,000.00	\$10,000.00	\$34,682.00
Travel	10.00%		\$19,311.00		\$10,000.00	\$29,311.00
Indirect Cost			\$15,000.00			\$15,000.00

View Allocations
New Transaction
View All Transactions

2

The **Transaction Form** will appear
Enter Transaction details

Transaction - Healthy Days, Healthy Lives

Transaction Details Attachments (0)

* = Required Field

Posted Date: 06/11/2018 Vendor: Type to search Vendor Currency: USD Status: Actual

Transaction Date: 06/11/2018 Vendor Contact: -select vendors contact- Exchange Rate: 1.00000 Amount: *

Check Number: Transaction Class: Non-Inventory Expense Invoice Number: GL Code:

Memo:

Transaction Allocations	Budgeted	Balance	Amount
Project: Grant: Gv Tutorial	\$330,000.00	\$220,418.00	
Transaction Type: Direct	\$250,000.00	\$162,173.00	
Budget Category: Administrative Costs	\$15,000.00	\$12,907.00	
Source/Program Category: No Allocation Exists	\$0.00	\$0.00	
Objective: No Allocation Exists	\$0.00	\$0.00	

+ Add Allocation

Transaction Balance (must be 0) \$0.00





3

Select **+ Add Allocation** to split the transaction by Transaction Type, Budget Category, Program Category or Associated Objective

Transaction Allocations		Budgeted		Balance	Amount
Project	Grant: Gv Tutorial	\$330,000.00	→	\$211,918.00	\$8,500.00
Transaction Type	Direct	\$250,000.00	→	\$153,673.00	
Budget Category	Personnel	\$80,000.00	→	\$38,250.00	
Source/Program Category	--Please Select--	\$0.00	→	\$-8,500.00	
Objective	- No Objective -	\$0.00	→	\$-8,500.00	
Project	Grant: Gv Tutorial	\$330,000.00	→	\$210,418.00	\$1,500.00
Transaction Type	Direct	\$250,000.00	→	\$152,173.00	
Budget Category	Services & Supplies	\$45,000.00	→	\$22,098.00	
Source/Program Category	--Please Select--	\$0.00	→	\$-10,000.00	
Objective	- No Objective -	\$0.00	→	\$-10,000.00	
+ Add Allocation		Transaction Balance (must be 0)			\$0.00

4

- Select the **Attachments** tab to upload supplemental documentation with the transaction record
- Select **+Add Attachment** and follow on-screen prompts

Transaction - 601 - Madera County

Transaction Details Attachments (0)

Attachment	Author	Date
+ Add Attachment		



Save & + New



Save & Close



Close





View All Transactions from within Budgeting Page

- 1 To view transactions by budget category from the budget, locate the Budget Category & right click on the dollar value against which the transaction will be applied

Select View All Transactions

GRANT : INFORMATION

Gv Tutorial

Project Year: Year 1 (FY 2016) 10/1/2015 - 9/30/2016

Grant/Sub-Projects: Primary Grant: Native Strategies

Budget Version: Approved Revision (8/26/2016)

Project Start: 10/1/2015

Project End: 9/30/2017

Grant Status: Active

Project Total: \$245,000.00

	IOC Rate	Threshold	Direct	Cash Match	In-Kind Match	Total	Leveraged
Sources			\$200,000.00	\$25,000.00	\$20,000.00	\$245,000.00	\$5,000.00
Contracts			\$15,000.00			\$15,000.00	
Sub-Awards			\$20,000.00			\$20,000.00	
Personnel			\$90,000.00	\$19,500.00		\$109,500.00	
Fringe Benefits	10.00%		\$20,000.00	\$1,500.00		\$21,500.00	
Supplies	10.00%		\$20,682.00	\$4,000.00	\$10,000.00	\$34,682.00	\$5,000.00
Travel	10.00%		\$19,318.00		\$10,000.00	\$29,318.00	
Indirect Cost			\$15,000.00			\$15,000.00	
Total			\$200,000.00		\$20,000.00	\$245,000.00	\$5,000.00

View Allocations

New Transaction

View All Transactions

- 2 The Transaction Summary form will appear

GRANT : INFORMATION

Gv Tutorial

Project Year: Year 1 (FY 2016) 10/1/2015 - 9/30/2016

Grant/Sub-Projects: Primary Grant: Native Strategies

Budget Version: Approved Revision (8/26/2016)

Project Start: 10/1/2015

Project End: 9/30/2017

Grant Status: Active

Project Total: \$245,000.00

Transaction Summary: Native Strategies

Add Transaction

Budget Category: Supplies

Transaction Type: Direct

Refresh

Transaction Details (click on a number above to load data)

Date: Vendor: Memo: Check Number: Planned:

	Budgeted	Planned	Obligated	Actual
Budgeted	\$20,682.00			
Current Period	\$0.00	\$0.00	\$0.00	\$0.00
Current Year to Date	\$0.00	\$0.00	\$0.00	\$500.00
Full Budget Year	\$0.00	\$0.00	\$0.00	\$500.00
Budget Year Balance	\$20,682.00			\$20,182.00
Percentage Remaining	100%			98%

Totals: \$0.00

Budget Category: Salary and Benefits

Total By Invoice

All Budget Category

Community -Based Organization (CBO) Contracts

Data Collection, Reporting and Evaluation Efforts

Fixed Assets/Equipment

Other (Including Training, Travel, Etc.)

Professional Services (Sub-Contractors/Consultants)

Salary and Benefits

Services and Supplies

Transaction Type: Direct

Direct

Cash Match

In-Kind Match

Leveraged Resources

Transaction Filter Options





Add & View Transactions

- 3 Select the transaction status and time period you wish to view in order to see transaction information appear in the **Transaction Details** section

Transaction Summary: **Native Strategies** Add Transaction

Budget Category: **Supplies**

Transaction Type: **Direct** Refresh

	Planned	Obligated	Actual
Budgeted	\$20,682.00		
Current Period	\$0.00	\$0.00	\$0.00
Current Year to Date	\$0.00	\$0.00	\$500.00
Full Budget Year	\$0.00	\$0.00	\$500.00
Budget Year Balance	\$20,682.00		\$20,182.00
Percentage Remaining	100%		98%

Transaction Details (click on a number above to load data)

Date	Vendor	Memo	Check Number	Actual
10/16/2015	Multipurpose Vendor	Office Supplies	0013	\$500.00

1 Transactions Totals: \$500.00

Double-click the transaction to view & edit!

- 4 Use the picklists to filter Transactions by **Budget Category** and **Transaction Type**
Select Refresh to load selected transaction view

Transaction Summary: **Native Strategies**

Budget Category: **Supplies**

Transaction Type: **Direct** Refresh

	Planned
Budgeted	\$20,682.00
Current Period	\$0.00
Current Year to Date	\$0.00
Full Budget Year	\$0.00
Budget Year Balance	\$20,682.00
Percentage Remaining	100%

Transaction Details (click on a number above to load data)

Budget Category

- Salary and Benefits
- Total By Invoice
- All Budget Category
- Community -Based Organization (CBO) Contracts
- Data Collection, Reporting and Evaluation Efforts
- Fixed Assets/Equipment
- Other (Including Training, Travel, Etc.)
- Professional Services (Sub-Contractors/Consultants)
- Salary and Benefits
- Services and Supplies

Transaction Type

- Direct
- Cash Match
- In-Kind Match
- Leveraged Resources





- 5 Users may also add a transaction from the **Transaction Summary** form by selecting **Add Transaction** in the top right corner of the form

	Planned	Obligated	Actual
Budgeted	\$20,682.00		
Current Period	\$0.00	\$0.00	\$0.00
Current Year to Date	\$0.00	\$0.00	\$500.00
Full Budget Year	\$0.00	\$0.00	\$500.00
Budget Year Balance	\$20,682.00		\$20,182.00
Percentage Remaining	100%		98%

Add & View Transactions from within Transaction Detail Report

- 1 To record transactions from the **Transaction Detail Report**, locate the Budget Category & click on the dollar value against which the transaction will be applied

GRANT : INFORMATION ▾
Gv Tutorial ≡

Select Report ▾ Transaction Detail Report
Revenue Source(s) ▾ 5 Selected
Project ▾ Grant: Gv Tutorial
Objective(s) ▾ 2 Selected
Transaction Status ▾ Actual
Report Start 10/01/2015

Expand All (7 Transactions)

	Direct	Cash Match	In-Kind Match	Leveraged
Sources (1)	\$200,000.00	\$25,000.00	\$20,000.00	\$5,000.00
Personnel (1)	\$90,000.00	\$19,500.00		
Fringe Benefits (1)	\$20,000.00	\$1,500.00		
Supplies (3)	\$20,682.00	\$4,000.00	\$10,000.00	\$5,000.00
Travel (2)	\$19,318.00		\$10,000.00	
Indirect Cost	\$15,000.00			

i Open the **Transaction Detail Report** by selecting **Reporting** from the **Project Management Menu**

- 2 To view *all* entered transactions for the selected Budget, select **Expand All** at the top left corner of the report

GRANT : INFORMATION ▾
Gv Tutorial ≡

Select Report ▾ Transaction Detail Report
Revenue Source(s) ▾ 5 Selected
Project ▾ Grant: Gv Tutorial
Objective(s) ▾ 2 Selected
Transaction Status ▾ Actual
Report Start 10/01/2015
Report End 09/30/2016
Project Start 10/1/2015
Project End 9/30/2017
Grant Status Active
Project Total \$ \$245,000.00

Expand All (7 Transactions)

	Direct	Cash Match	In-Kind Match	Leveraged
Sources (1)	\$200,000.00	\$25,000.00	\$20,000.00	\$5,000.00
Personnel (1)	\$90,000.00	\$19,500.00		
Fringe Benefits (1)	\$20,000.00	\$1,500.00		
Supplies (3)	\$20,682.00	\$4,000.00	\$10,000.00	\$5,000.00
Travel (2)	\$19,318.00		\$10,000.00	
Indirect Cost	\$15,000.00			

Select Report ▾ Transaction Detail Report
Revenue Source(s) ▾ 5 Selected
Project ▾ Grant: Gv Tutorial
Objective(s) ▾ 2 Selected
Expand All (7 Transactions)
Sources (1)





The Transaction Form & Transaction Types

The Transaction Form: Direct & Cash Match Non-Inventory Transactions

The Transaction form is a versatile aspect of the GrantVantage budgeting system.

In the Transaction Form, users can add Direct, Cash match, In-kind, Leveraged and Inventory transactions

- 1 Select the **Transaction Type**: Direct, Cash Match, In-Kind Match or Leveraged Resource
The value in the **Balance** column will reflect the most current budgeted values

Transaction - Gv Tutorial

Transaction Details Attachments (0)

Date * 08/23/2016 Vendor Multipurpose Vendor Currency USD Status Actual

Check Number 0013 Vendor Contact select vendors contact Exchange Rate 1.00000 Override Amount * \$500.00

Transaction Class Non-Inventory Expense Memo Office Supplies Invoice Number 1133

Transaction Allocations		Budgeted	Balance	Amount
Project	Grant: Gv Tutorial	\$186,818.00	\$180,818.00	\$500.00
Transaction Type	Direct	\$186,818.00	\$180,818.00	
Budget Category	Supplies	\$22,500.00		

+ Add Allocation

Transaction Type Direct
Cash Match
In-Kind Match
Leveraged Resource

For **Non-Inventory Direct** and **Cash Match** transactions, enter **Transaction Details** as needed

- 2 Search & select the Vendor Organization

Transaction - Gv Tutorial

Transaction Details Attachments (0)

Date * 08/23/2016 Vendor Multipurpose Vendor Currency USD Status Actual

Check Number 0013 Vendor Contact select vendors contact Exchange Rate 1.00000 Override Amount * \$500.00

Transaction Class Non-Inventory Expense Memo Office Supplies Invoice Number 1133

Transaction Allocations		Budgeted	Balance	Amount
Project	Grant: Gv Tutorial	\$186,818.00	\$180,818.00	\$500.00
Transaction Type	Direct	\$186,818.00	\$180,818.00	
Budget Category	Supplies	\$22,500.00	\$22,000.00	

+ Add Allocation

Transaction Balance (must be 0) \$0.00



Save & + New



Save & Close



Close



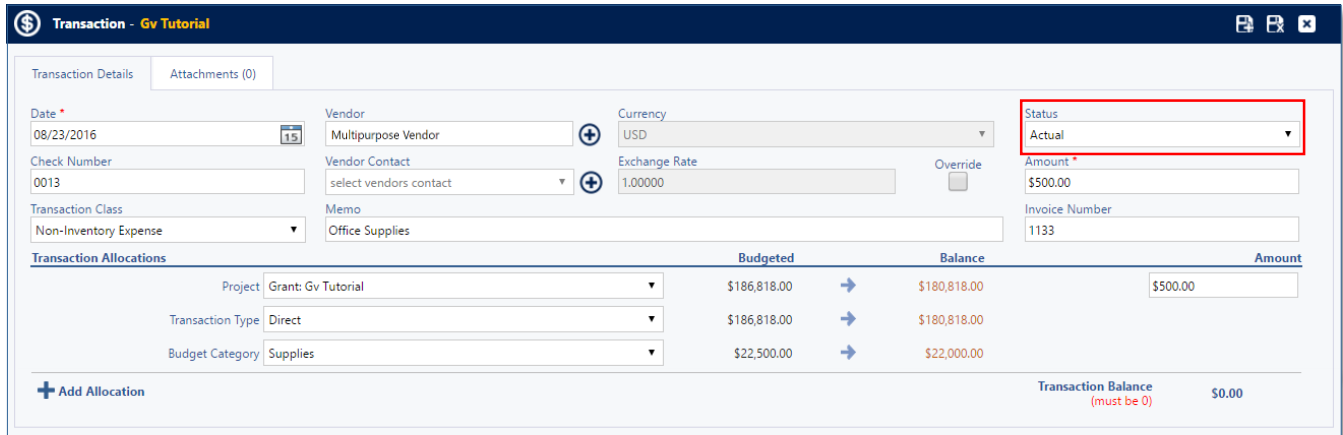


The Transaction Form & Transaction Types

3

Set the transaction status to **Actual**, **Obligated** or **Planned**

This will determine where the transactions appear in the **View All Transactions** form and the **Transaction Detail Report**

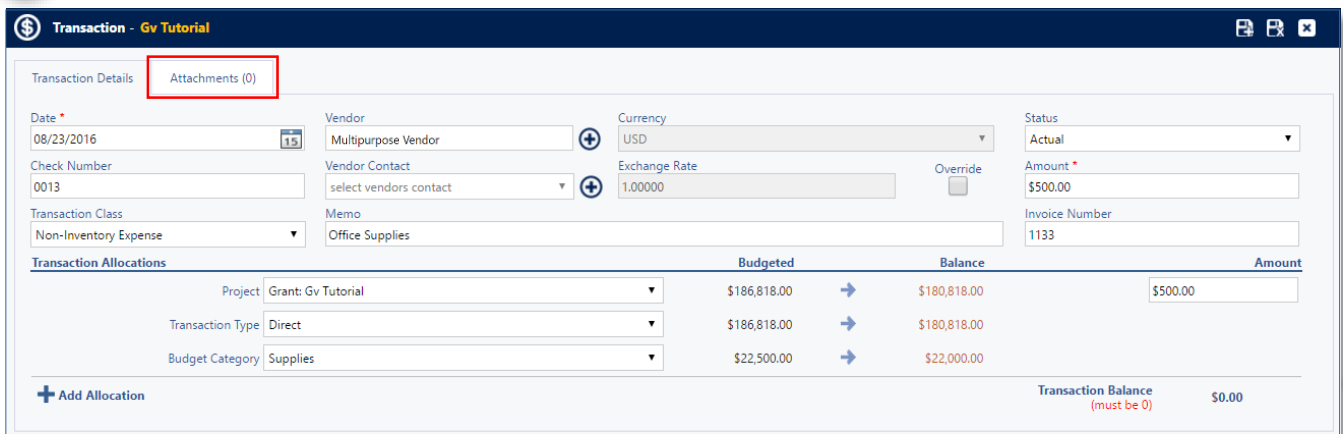


The screenshot shows the 'Transaction - Gv Tutorial' form. The 'Status' dropdown menu is highlighted with a red box and set to 'Actual'. The 'Amount' field is \$500.00. The 'Transaction Allocations' table shows three rows: Project (Grant: Gv Tutorial), Transaction Type (Direct), and Budget Category (Supplies). The 'Transaction Balance' is \$0.00.

Transaction Allocations	Budgeted	Balance	Amount
Project: Grant: Gv Tutorial	\$186,818.00	\$180,818.00	\$500.00
Transaction Type: Direct	\$186,818.00	\$180,818.00	
Budget Category: Supplies	\$22,500.00	\$22,000.00	

4

Select the **Attachments** tab to upload any desired supplemental documentation




The screenshot shows the 'Transaction - Gv Tutorial' form with the 'Attachments (0)' tab selected. The 'Status' dropdown menu is highlighted with a red box and set to 'Actual'. The 'Amount' field is \$500.00. The 'Transaction Allocations' table shows three rows: Project (Grant: Gv Tutorial), Transaction Type (Direct), and Budget Category (Supplies). The 'Transaction Balance' is \$0.00.

Transaction Allocations	Budgeted	Balance	Amount
Project: Grant: Gv Tutorial	\$186,818.00	\$180,818.00	\$500.00
Transaction Type: Direct	\$186,818.00	\$180,818.00	
Budget Category: Supplies	\$22,500.00	\$22,000.00	



The screenshot shows the 'Transaction - Gv Tutorial' form with the 'Attachments (0)' tab selected. The 'Attachment' field is highlighted with a red box and contains a '+ Add Attachment' button. The 'Author' and 'Date' fields are empty.



The screenshot shows the 'Transaction - Gv Tutorial' form with the 'Attachments (0)' tab selected. The 'Attachment' field is highlighted with a red box and contains a 'Choose File' button. The 'Author' and 'Date' fields are empty.





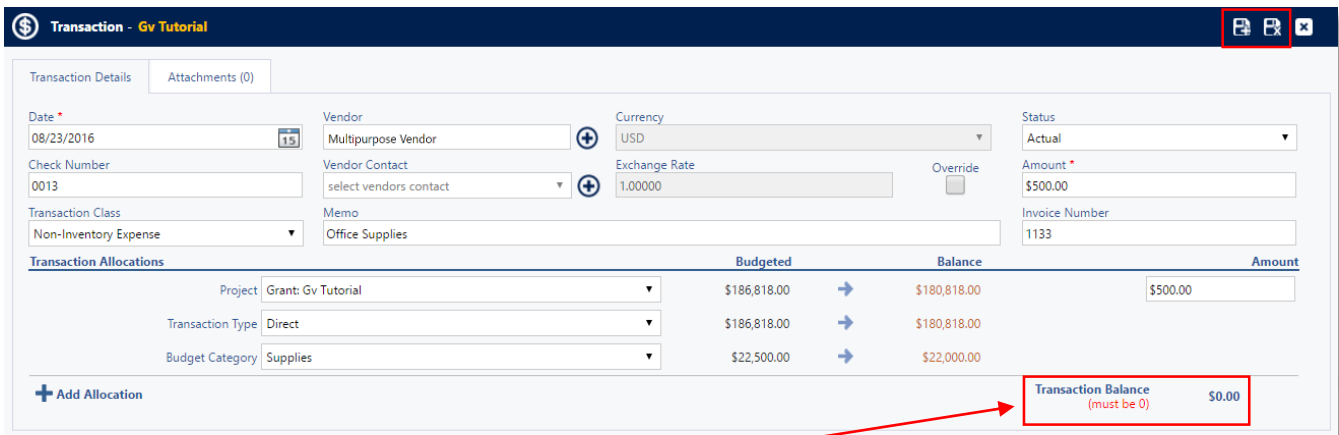
Don't forget to save Attachments!





The Transaction Form & Transaction Types

- 5 Once all transaction information is entered you can select **Save & New**  which will open a new transaction form or **Save & Close**  to close the transaction form and return to the page from which you started



Transaction - Gv Tutorial

Transaction Details Attachments (0)

Date * 08/23/2016 Vendor Multipurpose Vendor Currency USD Status Actual

Check Number 0013 Vendor Contact select vendors contact Exchange Rate 1.00000 Amount * \$500.00

Transaction Class Non-Inventory Expense Memo Office Supplies Invoice Number 1133


Transaction Allocations	Budgeted	Balance	Amount
Project Grant: Gv Tutorial	\$186,818.00	\$180,818.00	\$500.00
Transaction Type Direct	\$186,818.00	\$180,818.00	
Budget Category Supplies	\$22,500.00	\$22,000.00	

+ Add Allocation

Transaction Balance (must be 0) \$0.00

Ensure the **Transaction Balance equals \$0.00**

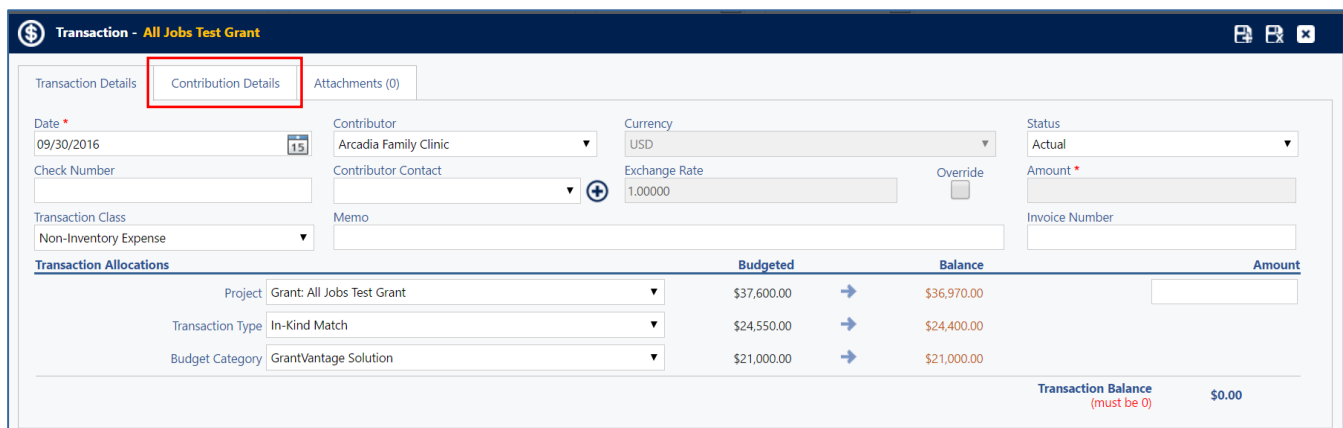
This means the Transaction Balance and the Allocation Amount match, otherwise the transaction cannot be saved

When **Save & New**  is selected, the project, transaction type, and budget category will reflect the information from the previous transaction.

The Transaction Form: In-Kind & Leveraged Resource Non-Inventory Transactions

In-Kind and Leveraged resources transaction types will prompt a new tab called **Contribution Details**. With these types of transactions, Actual transaction values are calculated based on information entered in the **Contribution Details** tab.

- 1 Set the **Transaction Type** to **In-Kind** or **Leveraged Resources**, then select the **Contribution Details** tab



Transaction - All Jobs Test Grant

Transaction Details Contribution Details Attachments (0)

Date * 09/30/2016 Contributor Arcadia Family Clinic Currency USD Status Actual

Check Number Contributor Contact Exchange Rate 1.00000 Amount * \$0.00

Transaction Class Non-Inventory Expense Memo Invoice Number

Transaction Allocations	Budgeted	Balance	Amount
Project Grant: All Jobs Test Grant	\$37,600.00	\$36,970.00	
Transaction Type In-Kind Match	\$24,550.00	\$24,400.00	
Budget Category GrantVantage Solution	\$21,000.00	\$21,000.00	

Transaction Balance (must be 0) \$0.00





The Transaction Form & Transaction Types

2

Contribution Details gives users the ability to enter a variety of contribution types such as Facilities/Space, Fee Waiver, Professional Services, Consumable Supplies, Supplies, Travel Expense, or Other.

Select the **Contribution Type** of the transaction. Once selected, the form will change depending on the selection – **Each image below displays the different options for Contribution Types!**

Transaction - Gv Tutorial

Transaction Details | Contribution Details | Attachments (0)

Facilities/Space

Contribution Type: Facilities/Space

Contributing Organization: Family Dynamics

Contribution Description: Classroom Space

Contribution Period Start: 08/23/2016

Contribution Period End: 08/23/2016

Square Footage: 900

Value: \$1,350.00

\$/SF/Month: 1.50

☒ Auto-Calculate Value

Contribution Type dropdown menu options: Facilities/Space, Fee Waiver, Professional Services, Consumable Supplies, Supplies, Travel Expense, Other

Transaction - Gv Tutorial

Transaction Details | Contribution Details | Attachments (0)

Fee Waiver

Contribution Type: Fee Waiver

Contributing Organization: Native Action Network

Contribution Description:

Contribution Period Start:

Contribution Period End:

Waiver Amount:

Transaction - Gv Tutorial

Transaction Details | Contribution Details | Attachments (0)

Professional Services

Contribution Type: Professional Services

Contributing Organization: Native Action Network

Contribution Description:

Contribution Period Start:

Contribution Period End:

Contribution Log

Contribution ID: CO_100121

Contributing Organization: Native Action Network

Contributing Person: select contributing contact

Reporting Period Start:

Reporting Period End:

Reporting Date: 01/07/2017

Hourly Rate:

Hours this Period:

Value:





The Transaction Form & Transaction Types

Transaction - Gv Tutorial

Transaction Details | Contribution Details | Attachments (0)

Consumable Supplies

Contribution Type: Consumable Supplies

Contributing Organization: Native Action Network

Contribution Description:

Contribution Period Start: 01/01/2017

Contribution Period End: 01/01/2017

Supplies Log

Supplies Description	Quantity	Value

Supplies Detail -

Contribution ID: CO_100121

Reporting Date: 01/07/2017

Supplies Description:

Quantity:

Unit Cost:

Total Value:

Transaction - Gv Tutorial

Transaction Details | Contribution Details | Attachments (0)

Supplies

Contribution Type: Supplies

Contributing Organization: Native Action Network

Contribution Description:

Contribution Period Start: 01/01/2017

Contribution Period End: 01/01/2017

Supplies Log

Supplies Description	Quantity	Value

Supplies Detail -

Contribution ID: CO_100121

Reporting Date: 01/07/2017

Supplies Description:

Quantity:

Unit Cost:

Total Value:

Transaction - Gv Tutorial

Transaction Details | Contribution Details | Attachments (0)

Travel Expense

Contribution Type: Travel Expense

Contributing Organization: Native Action Network

Contribution Description:

Contribution Period Start: 01/01/2017

Contribution Period End: 01/01/2017

Travel Expense Log

Expense Description	Category	Value

Travel Expense Detail -

Contribution ID: CO_100121

Reporting Date: 01/07/2017

Travel Expense Description:

Travel Expense Category: Airfare

Amount:





The Transaction Form & Transaction Types

Transaction - Gv Tutorial

Transaction Details | Contribution Details | Attachments (0) | **Other**

Contribution Type
Other

Contributing Organization
Native Action Network

Contribution Description

Total Value

Once all Contribution information is added, select Save & New or Save & Close to complete the Transaction

The Transaction Form: Inventory Transactions

Inventory transactions function the same no matter what the Transaction Type

- 1 Set the Transaction Class to Inventory then select the Inventory Details tab

Transaction - Gv Tutorial

Transaction Details | **Inventory Details** | Attachments (0)

Date * 08/25/2016
Check Number
Transaction Class
Inventory Expense

Vendor Multipurpose Vendor
Vendor Contact select vendors contact
Memo

Currency USD
Exchange Rate 1.00000
Override

Status Actual
Amount *
Invoice Number

Transaction Allocations	Budgeted	Balance	Amount
Project Grant: Gv Tutorial	\$415,000.00	\$415,000.00	
Transaction Type Direct	\$350,000.00	\$350,000.00	
Budget Category Office Supplies	\$9,818.00	\$9,818.00	

+ Add Allocation

Transaction Balance (must be 0) \$0.00

Transaction - Gv Tutorial

Transaction Details | **Inventory Details** | Attachments (0)

Inventory Type
Computer

Inventory Description

Unit(s) Received
Unit(s) Outstanding
Unit(s) Returned
Discount
Shipping Charges

Value
Value
Value
Taxes
Other Fees

Invoice Total : \$0.00

Received Inventory

ID	Description	Value
----	-------------	-------





The Transaction Form & Transaction Types

2

Select the **+** and complete the **Inventory Item** form to add inventory

Set inventory status to Grantee Received, Issued to Recipient, or Returned by Recipient

The screenshot shows the 'Transaction - Gv Tutorial' form with the 'Inventory Details' tab selected. The 'Inventory Item' form is being added to the transaction. The 'Inventory Item' form has the following fields:

- Inventory ID: IN_100018
- Serial Number: 00123456
- Inventory Description: 1 Laptop
- Recipient Organization: Native Action Network
- Received by Grantee On: 10/16/2015
- Due from Recipient On: 09/29/2017
- Delivery Confirmation Type: Signature
- Inventory Status: Issued to Recipient
- Inventory Value: \$500.00
- Recipient Contact: Iris Tuesday
- Issued to Recipient On: 10/19/2015
- Returned by Recipient On: (empty)

The 'Transaction' form has the following fields:

- Inventory Type: Computer
- Inventory Description: (empty)
- Unit(s) Received: 1
- Unit(s) Outstanding: 1
- Unit(s) Returned: 0
- Discount: (empty)
- Shipping Charges: \$50.00
- Taxes: \$50.00
- Other Fees: (empty)
- Invoice Total: \$600.00

3

Add additional information such as Discount values, which will deduct from the total inventory amount, and Taxes, Shipping Charges, or Other Fees that will add to the transaction total.

The screenshot shows the 'Transaction - Gv Tutorial' form with the 'Inventory Details' tab selected. The 'Inventory Item' form is no longer visible, and the 'Transaction' form is updated with the following fields:

- Inventory Type: Computer
- Inventory Description: (empty)
- Unit(s) Received: 1
- Unit(s) Outstanding: 1
- Unit(s) Returned: 0
- Discount: (empty)
- Shipping Charges: \$50.00
- Taxes: \$50.00
- Other Fees: (empty)
- Invoice Total: \$600.00

The 'Outstanding Inventory' table shows the following data:

ID	Description	Value
IN_100018	Iris Tuesday, Native Action Network	\$500.00



Save & + New



Save & Close



Close





Drawdowns & Reimbursements: Set-Up & Access

Drawdowns are used to request and track money received by funding sources

Reimbursements are repayments from a funder for funds already spent by a grantee



Budget information must be saved before inputting
Drawdowns & Reimbursements

- 1 Begin by ensuring Revenue Sources have been entered, and the Payment Method & Payment Request Report have been identified.

If **no** Revenue Source exists, contact your GrantVantage Administrator

Double-click on an existing revenue source to open & view details

▸ Key Dates
▸ Grant Details
▸ Grantee Info
▾ Revenue Source(s)

Revenue Sources Information

+ ADD REVENUE SOURCES

Revenue Source Organiz...	Revenue Sourc...	Parent Organization	Organization T..
Administration for Children...	Grant Funder	Department of Health & H...	Federal Governm...

- 2 Select **Drawdowns & Disbursements** from the **Project Management Menu**

Settings ▾ Grant ▾ Gv Tutorial ▾

Project Management

- Objectives
- Budgeting
- Drawdowns & Disbu...**
- Agreements
- Assessment
- Reports
- Grant Close-Out
- Communication





Drawdowns & Reimbursements

This is the **Drawdowns & Disbursements** Page

In the **Drawdowns/Reimbursements** tab, a list of revenue sources and partners will display alongside all Direct and Cash Match budget information

This form tracks all planned, requested, paid and unpaid drawdown and reimbursement information for each revenue source and partner

GRANT : INFORMATION ▾
Gv Tutorial ≡

Project Start 10/1/2015 Project End 9/30/2017 Grant Status Active Project Total \$ \$245,000.00

Drawdowns/Reimbursements Disbursements

Revenue Source	Revenue Source Type	Payment Method
Administration for Children & Families (95.523)	Grant Funder	Reimbursement
Native Action Network	Partner	Scheduled Drawdown

EXPORT TO EXCEL REFRESH

	Direct	Cash Match	Planned	Requested	Total Paid	Unpaid Balance
	\$200,000.00		\$56,000.00	\$70,000.00	\$0.00	\$200,000.00
		\$15,000.00	\$10,000.00	\$10,000.00	\$5,000.00	\$10,000.00
Totals	\$200,000.00	\$15,000.00	\$66,000.00	\$80,000.00	\$5,000.00	\$210,000.00

Drawdowns/Reimbursements Disbursements

Revenue Source	Revenue Source Type	Payment Method
Administration for Children & Families (95.523)	Grant Funder	Reimbursement
Native Action Network	Partner	Scheduled Drawdown

EXPORT TO EXCEL REFRESH

	Direct	Cash Match	Planned	Requested	Total Paid	Unpaid Balance
	\$200,000.00		\$56,000.00	\$70,000.00	\$0.00	\$200,000.00
		\$15,000.00	\$10,000.00	\$10,000.00	\$5,000.00	\$10,000.00
Totals	\$200,000.00	\$15,000.00	\$66,000.00	\$80,000.00	\$5,000.00	\$210,000.00





Drawdowns & Reimbursements: Add Planned Drawdown/Reimbursement

- 1 Select a Revenue Source or Partner to display all associated years

Drawdowns/Reimbursements Disbursements

Revenue Source	Revenue Source Type	Payment Method
Administration for Children & Families (95.523)	Grant Funder	Reimbursement
Native Action Network	Partner	Scheduled Drawdown

- 2 Select a project year to view all existing drawdown/reimbursement transactions or to add a new drawdown/reimbursement transaction

Drawdowns/Reimbursements Disbursements

Revenue Source	Revenue Source Type	Payment Method
Administration for Children & Families (95.523)	Grant Funder	Reimbursement
Year 1 (FY 2016)(10/1/2015 - 9/30/2016)		
Year 2 (FY 2017)(10/1/2016 - 9/30/2017)		
Native Action Network	Partner	Scheduled Drawdown

- 3 From here, users may add a new transaction by selecting **Request Drawdown/Reimbursement**

Drawdowns/Reimbursements Disbursements

Revenue Source	Revenue Source Type	Payment Method			
Administration for Children & Families (95.523)	Grant Funder	Reimbursement			
Year 1 (FY 2016)(10/1/2015 - 9/30/2016)					
Requested By	Date On	Status	Paid On	Number	Document Link
Christopher James	8/25/2016	Requested		TM4574	GV Drawdown...
Christopher James	8/23/2016	Requested			GV Drawdown...

REQUEST DRAWDOWN / REIMBURSEMENT





Drawdowns & Reimbursements

4a

When **Payment Method** is set to **Drawdown** the transaction form will appear with two tabs – **Drawdown Detail & Attachments**. The Revenue Source or Partner will automatically populate and cannot be changed. Enter all **Drawdown Detail** information

The screenshot shows the 'Drawdown/Reimbursement' form with the 'Drawdown Detail' tab selected. The form contains the following fields:

- Planned Date ***: 09/01/2016
- Partner**: Native Action Network
- Currency**: USD
- Status**: Planned
- Period Start ***: 09/01/2016
- Partner Contact**: Type to search
- Ex. Rate**: 1.00000
- Override**: ☐
- Amount ***: \$0.00
- Period End ***: 09/30/2016
- Check Number**
- Invoice Number**
- Unbilled Amount ***: \$0.00
- Memo**

4b

When **Payment Method** is set to **Reimbursement** the transaction form will appear with four tabs – **Drawdown Detail, Transaction Summary, Prior Unbilled Transactions & Attachments**. The Revenue Source or Partner will automatically populate and cannot be changed. Enter all **Drawdown Detail** information (**Amount** and **Unbilled Amount** fields will populate based on **Transaction Summary** information)

The screenshot shows the 'Drawdown/Reimbursement' form with the 'Transaction Summary' tab selected. The form contains the following fields:

- Planned Date ***: 09/01/2016
- Funder**: Administration for Children & Families (95.523)
- Currency**: USD
- Status**: Planned
- Period Start ***: 09/01/2016
- Funder Contact**: Type to search
- Ex. Rate**: 1.00000
- Override**: ☐
- Amount ***: \$0.00
- Period End ***: 09/30/2016
- Check Number**
- Invoice Number**
- Unbilled Amount ***: \$0.00
- Memo**

b2

The **Period Start** and **Period End** fields are especially important when entering reimbursement information. These fields will determine which transactions appear in the **Transaction Summary** tab and **Prior Unbilled Transactions** tab

i

Transaction Summary: Lists all **actual transactions** dated *within* period start and end dates

Prior Unbilled Transactions: All **actual unreimbursed transactions** dated *before* the period start date





Drawdowns & Reimbursements

- b₃** Once all **Drawdown Detail** information is entered, including the **Period Start** and **Period End** fields, select the **Transaction Summary** tab to determine transactions for reimbursement. For transactions ineligible for reimbursement, deselect the transaction and enter a **Disallow Memo**

Drawdown/Reimbursement

Drawdown Detail | **Transaction Summary (15)** | Prior Unbilled Transactions (0) | Attachments (0)

Expand All (16 Transactions) \$18,499.98

- Marketing (1)**
- Travel (1)**
- Supplies (1)**
- Equipment (1)**
- GrantVantage Solution (1)**
- Personnel (11)**
 - Tutorial Services Specialist (2)**

<input type="checkbox"/>	10/1/2014	Ross Accounting	1300	\$1,666.66
Disallow Memo:				
<input checked="" type="checkbox"/>	12/1/2014	Ross Accounting	1301	\$1,666.66
 - Educational Researcher (3)**
 - Project Director (6)**

- b₄** To add previous unreimbursed transactions to the request, go to the **Prior Unbilled Transactions** tab and select transaction(s) for reimbursement

Drawdown/Reimbursement

Drawdown Detail | Transaction Summary (6) | **Prior Unbilled Transactions (10)** | Attachments (0)

Expand All (10 Transactions) \$0.00

- Travel (1)**
- Supplies (1)**
- Equipment (1)**
 - Personal Computers (1)**

<input type="checkbox"/>	10/5/2014	OfficePros	1700	\$1,000.00
--------------------------	-----------	------------	------	------------
- GrantVantage Solution (1)**
- Personnel (6)**





Drawdowns & Reimbursements



- 4c To add attachments to a Drawdown or Reimbursement request, select the **Attachments** tab
Select **Choose File** to browse computer files then select the save icon

Drawdown/Reimbursement

Drawdown Detail Transaction Summary (6) Prior Unbilled Transactions (10) **Attachments (1)**

Receipt.jpg

Choose File No file chosen

- 5 Once all Drawdown or Reimbursement information is saved. Select  in the top right of the window, which will save the transaction and return you to the **Drawdowns/Reimbursements** Page. Select  to save the transaction and stay in the form

Drawdown/Reimbursement

Drawdown Detail Transaction Summary (16) Prior Unbilled Transactions (0) Attachments (1)

Planned Date * 01/03/2015 Funder State of Texas Currency USD Status Planned

Period Start * 10/01/2014 Funder Contact Type to search Ex. Rate 1.00000 Override Amount * \$20,166.64

Period End * 12/31/2014 Check Number Invoice Number Unbilled Amount * \$0.00

Memo





Drawdowns & Reimbursements: Performance-Based Payments

- 1 When ☒ Are payments performance-based? is checked in the **Revenue Source form**, Performance Measures and Activities can be linked to specific Drawdown or Reimbursement requests

To add a requirement, select the Drawdown or Reimbursement to which performance data will be linked, then select **Add Requirement**

The screenshot shows the 'Drawdowns/Reimbursements' form. At the bottom, a red box highlights the '+ ADD REQUIREMENT' button, with a hand cursor pointing to it. The form displays details for a 'State of Texas' revenue source, including a 'Grant Funder' payment method and a 'Reimbursement' of \$82,000.00. A table lists performance measures, such as 'Increase Number of Students with Declared Majors' and 'Increase Rate at Which Students Persist from Fall Term to Fall Term', with their respective 'Planned', 'Required', and 'Current' amounts and progress bars.

Revenue Source	Revenue Source Type	Payment Method	Direct	Cash Match	Planned
State of Texas	Grant Funder	Reimbursement	\$82,000.00		\$37,666.64
Year 1 (FY 2015)(10/1/2014 - 9/30/2015)			\$40,000.00		\$20,166.64

Requested By	Date On	Status	Paid On	Number	Document Link
Sequoyah Stamps	1/3/2015	Planned			Receipt.jpg

Required Objective	Result Type	Result	Planned	Required	Current
Increase Number of Students with Declared Majors	Performance Measure	Increase Number of Enrolled Students with a Declared Major Program of Study will increase by 1% (Fall 2014), 3% (Fall 2015), 7% (Fall 2016), 11% (Fall 2017), and 15% (Fall 2018)	15%	10%	12%
Increase Rate at Which Students Persist from Fall Term to Fall Term	Grant Activity	Student Success Courses	Completed	In Progress	In Review

- 2 Select the **Objective** related to the payment requirement.
Select **Requirement Type**, the Performance Measure or Grant Activity,
and enter the **Required Minimum** for payment.
Once complete, select Save

The screenshot shows the 'Add Disbursement Requirement' form. It includes dropdown menus for 'Select Objective' (Improved Client Services), 'Select Requirement Type' (Performance Measure), and 'Select Request' (Enroll 50 new clients in the Ryan White HIV/AIDS Program). Below these are fields for 'Planned Amount' (50), 'Current Amount' (47), and 'Required Minimum Amount for Payment'.

Planned Amount: 50
Current Amount: 47
Required Minimum Amount for Payment:





Drawdowns & Reimbursements

Once saved, requirements will appear below the drawdown

Each Performance Measure & Activity will display a **Planned**, **Required**, or **Current** value marker

Drawdowns/Reimbursements | Disbursements

Revenue Source	Revenue Source Type	Payment Method	Direct	Cash Match	Planned
State of Texas	Grant Funder	Reimbursement	\$82,000.00		\$37,666.64
Year 1 (FY 2015)(10/1/2014 - 9/30/2015)			\$40,000.00		\$20,166.64
Requested By	Date On	Status	Paid On	Number	Document Link
Sequoyah Stamps	1/3/2015	Planned			Receipt.jpg
Requirements					
Required Objective	Result Type	Result			
Increase Number of Students with Declared Majors	Performance Measure	Increase Number of Enrolled Students with a Declared Major Program of Study will increase by 1% (Fall 2014), 3% (Fall 2015), 7% (Fall 2016), 11% (Fall 2017), and 15% (Fall 2018)	Planned	15%	
			Required	10%	
			Current	12%	
Increase Rate at Which Students Persist from Fall Term to Fall Term	Grant Activity	Student Success Courses	Planned	Completed	
			Required	In Progress	
			Current	In Review	

+ ADD REQUIREMENT

Drawdowns & Reimbursements: Generating Requests

- To generate a request, select **Generate Request** from within the Drawdown/Reimbursement Table or select **Generate Request** from within the Drawdown/Reimbursement form. Select **Preview Request** to view the Request document. This will open up a new window where users can review all invoice/report information.

Drawdowns/Reimbursements | Disbursements | EXPORT TO EXCEL | REFRESH

Revenue Source	Revenue Source Type	Payment Method	Direct	Cash Match	Planned	Requested	Total Paid	Unpaid Balance
Administration for Children & Families (95.523)	Grant Funder	Scheduled Drawdown	\$400,000.00		\$2,500.00	\$14,000.00	\$0.00	\$400,000.00
Year 1 (FY 2016)(10/1/2015 - 9/30/2016)			\$200,000.00		\$2,500.00	\$0.00	\$0.00	\$200,000.00
Requested By	Date On	Status	Paid On	Number	Document Link			
Sequoyah Stamps	10/1/2015	Planned		IN-1015	Generate Request	\$2,500.00	\$0.00	\$0.00
+ REQUEST DRAWDOWN / REIMBURSEMENT								
Year 2 (FY 2017)(10/1/2016 - 9/30/2017)			\$200,000.00		\$0.00	\$14,000.00	\$0.00	\$200,000.00
Native Action Network	Partner	Scheduled Drawdown		\$30,000.00	\$10,000.00	\$10,000.00	\$5,000.00	\$25,000.00
Totals			\$400,000.00	\$30,000.00	\$12,500.00	\$24,000.00	\$5,000.00	\$425,000.00

Drawdown/Reimbursement | GENERATE REQUEST | PREVIEW REQUEST

Drawdown Detail | Attachments (0) | Payments (0)

Planned Date * 10/01/2015 | Funder Administration for Children & Families (95.523) | Currency USD | Status Planned

Period Start * 10/01/2015 | Funder Contact Lina Green | Ex. Rate 1.00000 | Override | Amount * \$2,500.00


Period End * 12/31/2015 | Check Number | Invoice Number IN-1015 | Unbilled Amount * \$0.00



Memo
Drawdown Request: October - December










Drawdowns & Reimbursements

- 2 When a request is generated, the transaction's status changes from Planned to **Requested**. At this point, users may use the in-mail feature and send requests via email directly to any outside revenue sources or partners. To do this, exit the transaction and select 

 Drawdowns/Reimbursements  Disbursements

Revenue Source	Revenue Source Type	Payment Method			
 Administration for Children & Families (95.523)	Grant Funder	Scheduled Drawdown			
Year 1 (FY 2016)(10/1/2015 - 9/30/2016)					
Requested By	Date On	Status	Paid On	Number	Document Link
Sequoyah Stamps	9/30/2016	Requested		IN-1015	GV_Drawdown...  
 REQUEST DRAWDOWN / REIMBURSEMENT					
Year 2 (FY 2017)(10/1/2016 - 9/30/2017)					
 Native Action Network	Partner	Scheduled Drawdown			

- 3 A new window will appear populating the **To** field with Revenue Source or Partner contacts. The invoice or request will automatically attach to the email. Add a new attachment by selecting the **+** above the attachments table. Below Attachments is a text field allowing users to enter a note with the request.

From: Sequoyah Stamps


To: Administration for Children & Families; Brian Murphy; Lina Green; Lisa Henry

Cc: --












Bcc: --

Subject: Drawdown and other reports

Attachments



File Name	File Size (Bytes)
GV_Drawdown_Report.xls	47,871

   **B** **I** **U**        

Drawdown and other reports





- 4 With all desired information entered, select **Send** in the White Ribbon Bar
The email will be sent and the page will return to Drawdown & Disbursements

EMAIL

Drawdown and other reports

Priority: Normal

Due: --

From: Sequoyah Stamps

To: Administration for Children & Families; Brian Murphy; Lina Green; Lisa Henry

Cc: --

Bcc: --

Subject: Drawdown and other reports

Attachments

File Name ↑	File Size (Bytes)
GV_Drawdown_Report.xls	47,871



How to Request a Budget Change

- Budget Change Requests** are required anytime a user wishes to make changes to an **Approved Budget** in GrantVantage.

To create & submit a **Budget Change Request** open the Budget you wish to change, select **Budget Settings**, then select **Request Budget Change**

The screenshot shows the GrantVantage interface. At the top, there's a header with 'Gv Tutorial' and a menu icon. Below the header, there are several tabs: 'Project Year', 'Grant/Sub-Projects', and 'Budget Version'. The 'Budget Version' tab is selected, showing 'Approved (8/26/2016)'. On the right side, there's a 'Project Total \$' field showing '\$240,000.00'. A dropdown menu is open, showing options: 'Create Revision Draft', 'Request Budget Change', 'View Change Requests', 'Properties', and 'Save As Template'. A red box highlights the 'Request Budget Change' option, and a red arrow points to it from a gear icon in the top right corner.

- The **Budget Change Status** at the top of the Change Request Form reflects the **Allowable Budget Change** value based on the **Budget Change Tolerance** entered in the **Budget Properties**. As Change Requests are approved, the **Changes to Date** and **Remaining Allowed** percentages and monetary values will reflect those changes.

The screenshot shows the 'Change Request' form. At the top, there's a header with 'Change Request' and a close button. Below the header, there are two tabs: 'Change Request' and 'Attachment(s)'. The 'Change Request' tab is selected. The form is divided into two main sections: 'Budget Change Status (Direct)' and 'New Change Request'. The 'Budget Change Status (Direct)' section is highlighted with a red box and contains a table with the following data:

Allowed Changes	Changes To Date	Remaining Allowed
0.0%	0.0%	0.0%
\$0.00	\$0.00	\$0.00

The 'New Change Request' section contains several fields: 'Category Type' (set to 'Direct'), 'Title' (empty), 'From Budget Category' (empty), 'To Budget Category' (empty), 'Current Amount' (\$0.00), 'New Amount' (\$0.00), 'Change Amount (\$)' (\$0.00), and 'Balance Amount (\$)' (\$0.00). There are also plus signs (+) next to the 'From Budget Category' and 'To Budget Category' fields. At the bottom, there's a 'Change Justification' field with an asterisk (*) and a red dot, and two buttons: 'Cancel Change' and 'Request Change'.





Budget Change Requests & Revision

3

- Select the **Category Type** (Direct, Cash Match, or In-Kind)
- Enter a **Title** for the Request
- Use the **From Budget Category** picklists to determine the category the funds will be moving **from**
- Use the **To Budget Category** picklist to determine the category the funds will be moving **to**
- Enter the **New Amounts** for each Budget Category
- Enter a **Change Justification**

Change Request

Change Request | Attachment(s)

Budget Change Status (Direct)

Allowed Changes	Changes To Date	Remaining Allowed
0.0%	0.0%	0.0%
\$0.00	\$0.00	\$0.00

New Change Request

Category Type: Direct | Title:

From Budget Category: | Current Amount: \$0.00 | New Amount: \$0.00

To Budget Category: | Current Amount: \$0.00 | New Amount: \$0.00

Change Amount (\$): \$0.00 | Balance Amount (\$): \$0.00

Change Justification *

Cancel Change | Request Change

4

- If desired, select the **Attachments** tab to upload supplemental documentation with the Budget Change Request
- Select **+Add Attachment** and follow on-screen instructions

Change Request

Change Request | Attachment(s)

File Name | Created On | Created By

+ADD ATTACHMENT

- Once desired changes & attachments have been entered, select **Request Change**

Cancel Change | Request Change





Budget Change Requests & Revision

View Budget Change Requests

- 1 • Only users with the appropriate permissions settings may view/respond to Budget Change Requests
 - Select Budget Settings ⚙
 - Select **View Change Requests** to view all requested changes to date

The screenshot shows the GrantVantage 'GRANT INFORMATION' header with fields for Project Year, Grant/Sub-Projects, and Budget Version. On the right, there's a 'Grant Status' section with an 'Active' indicator and a 'Project Total \$' of '\$240,000.00'. A settings gear icon is highlighted with a red box, and a dropdown menu is shown with the following options: 'Create Revision Draft', 'Request Budget Change', 'View Change Requests' (highlighted with a red box and an arrow), and 'Properties'.

- 2 • Change Requests may be sorted by **Pending**, **Approved** or **Decline Requests**, then further sorted by Funding Type – **Direct**, **Cash Match** or **In-Kind**
 - Simply select a Change Request to view its details

The 'Request Changes' window displays the 'Budget Change Status (Direct)' summary:

Budget Change Status (Direct)	Changes To Date	Remaining Allowed
Allowed Changes 10.0% \$25,000.00	14.0% \$35,000.00	-4.0% \$-10,000.00

Below the summary, there's a filter section with 'Approved Change Requests' selected in the dropdown and 'Direct' in the funding type dropdown. A hand cursor points to the 'Approved Change Requests' dropdown.

	Category	Attachment
Change Request: Personnel to Administrative Costs	Direct	(0)
Change Request: Other to Per Diem	Direct	(0)





Budget Revisions

- 1 If many changes are needed for an Approved Budget or the changes exceed the budget change tolerance, users have the option of creating a **Budget Revision**.
Select **Create Revision Draft** from the **Settings** menu of an **Approved Budget**.

GRANT : INFORMATION ▾
Gv Tutorial ≡

Project Year: Year 1 (FY 2015) 10/1/2015 - 9/30/2016 ▾ Grant/Sub-Projects: Primary Grant: Native Strategies ▾ Budget Version: Approved (8/26/2016) ▾

Project Start: 10/1/2015 Project End: 9/30/2017 Grant Status: Active Project Total: \$240,000.00

Settings menu options:
Create Revision Draft
Request Budget Change
View Change Requests
Properties

- 2 Select OK to confirm the creation of a Revision Draft
Once confirmed,
the new Revision Draft Budget may be entered/managed

gvstaging.crm.dynamics.com says:

Are you sure you want to create a Revision Draft of this budget?

☐ Prevent this page from creating additional dialogs.

OK Cancel

- 3 As budget values are changed, a new row beneath Total, labeled **Difference** displays the differences between the previous budget and the current Revision Draft
Green indicates the entered budget value is lower than the previous value
Red indicates the entered budget value is higher than the previous value

GRANT : INFORMATION ▾
Gv Tutorial ≡

Project Year: Year 1 (FY 2015) 10/1/2015 - 9/30/2016 ▾ Grant/Sub-Projects: Primary Grant: Native Strategies ▾ Budget Version: Revision Draft (8/26/2016) ▾

Expand All IDC Rate Threshold

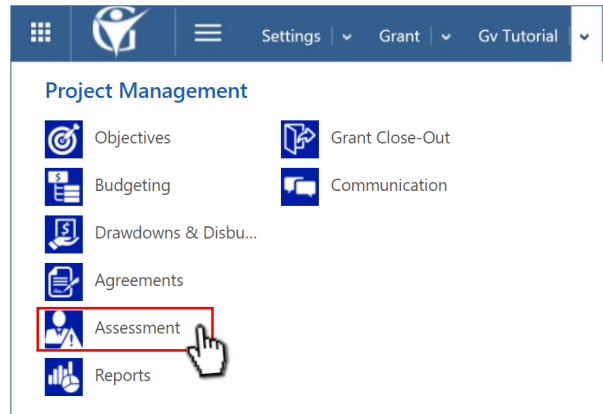
Sources			
Personnel			
Fringe Benefits	10.00%		
Supplies	10.00%		
Travel			
Indirect Cost	<input checked="" type="checkbox"/>		
Total			\$2
Difference			

The **Difference** row indicates where values decreased or increased between the Approved Budget and the Revised Budget

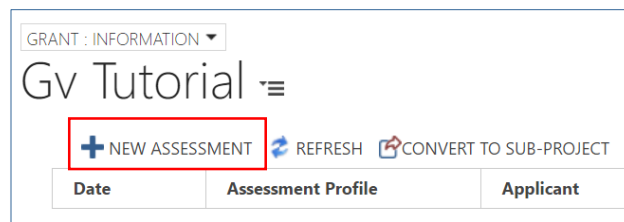


Performing Assessments

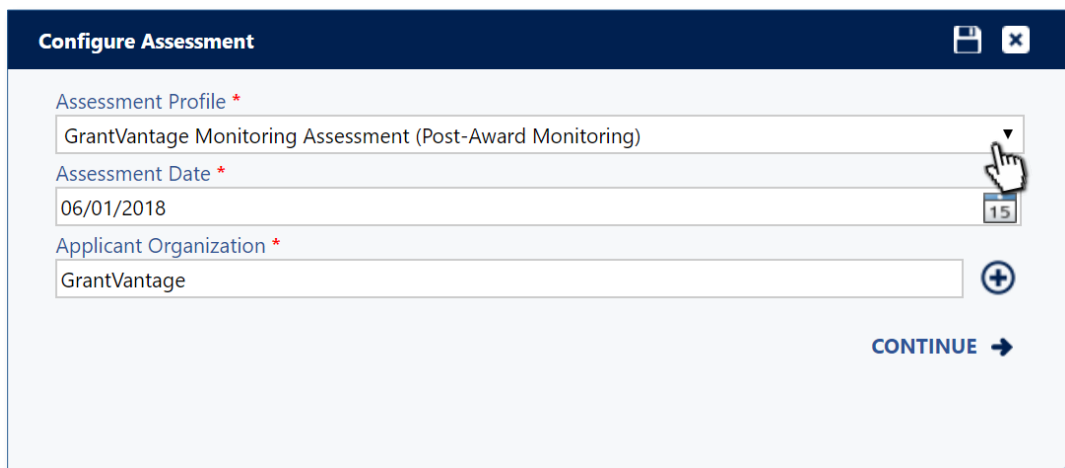
- 1 To perform an assessment, open the projects that will be assessed
Select **Assessment** in the Project Management Menu



- 2 Select **New Assessment** to select a profile



- 3 Select the desired Assessment Profile
Enter the Assessment Date
Search & select the Applicant Organization Name

A screenshot of the 'Configure Assessment' form. The form has a dark blue header with the title 'Configure Assessment' and two icons (a save icon and a close icon). The form contains three main sections: 'Assessment Profile *' with a dropdown menu showing 'GrantVantage Monitoring Assessment (Post-Award Monitoring)', 'Assessment Date *' with a date input field showing '06/01/2018' and a calendar icon, and 'Applicant Organization *' with a text input field showing 'GrantVantage' and a plus icon. At the bottom right of the form is a 'CONTINUE' button with a right arrow.



4

When an Assessment is selected, users may begin responding to each metric question

The screenshot shows the GrantVantage assessment interface. At the top, there are buttons for '+ NEW ASSESSMENT', 'REFRESH', and 'CONVERT TO SUB-PROJECT'. Below these is a table with columns: Date, Assessment Profile, Applicant, Score, % Completed, Assessed By, and Converted to Sub-Project. The table contains one row with data: 06/01/2018, Grant: GrantVantage Monitoring Assessment (Post-Award Monitoring), GrantVantage, 0.00, Jazzy James, and a checkbox for 'Converted to Sub-Project'. Below the table, the 'GrantVantage' assessment is displayed. It shows 'Category 1 of 8' and 'General Screening'. The progress bar indicates '0.00% Complete'. The 'Question 1 of 15' is displayed. The question is '1. New to State or Federal Grants' and asks 'Is the organization new (within three years) to managing state or federal grant funds?'. There is a dropdown menu for 'Please Select' and a 'Comments' text area. On the right, there is an 'Attachments' section with a button 'ADD ATTACHMENT'. At the bottom, there are 'PREVIOUS' and 'NEXT' navigation buttons. A 'SAVE' button is located at the top right of the assessment area.

5

Navigate back and forth through the assessment by using the cursors at the top left of the Assessment or select **Next** in the bottom right

The screenshot shows the navigation controls of the assessment. It includes a 'Category 1 of 8' header, a 'General Screening' section, and a 'Question 1 of 15' section. There are left and right arrows for navigation.

6

Users may select **Add Attachment** to add attachments to each metric

During the Assessment users may select **SAVE** to save the Assessment and return to it at a later time

The screenshot shows the 'Attachments' section of the assessment. It includes a button labeled 'ADD ATTACHMENT' with a paperclip icon.

7

To link an assessment to a sub-project or to add a new sub-project from the assessment, select **Convert to Sub-Project**

The screenshot shows the GrantVantage interface with the 'CONVERT TO SUB-PROJECT' button highlighted in a red box. The interface includes a header 'Gv Tutorial' and buttons for '+ NEW ASSESSMENT', 'REFRESH', and 'CONVERT TO SUB-PROJECT'. Below these buttons is a table with columns: Date, Assessment Profile, and Applicant.

8

Select an existing sub-project or select the + sign to add a new sub-project. Enter the new sub-project information in the **Sub-Project Form**, select Save then select **Assign**

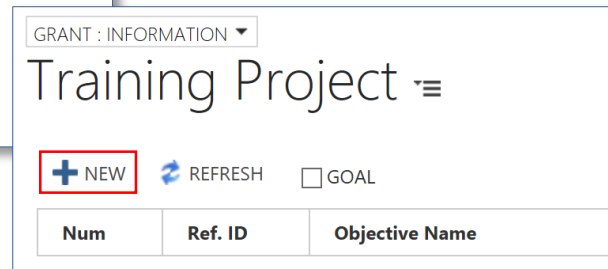
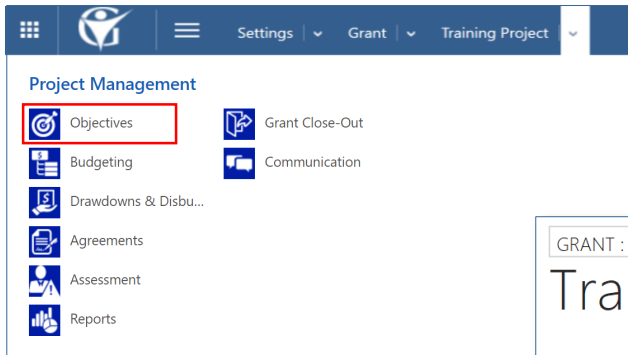
The screenshot shows the 'Convert Assessment to Sub-Project' form. It includes a header 'Convert Assessment to Sub-Project' and a close button. The form has two dropdown menus: 'Applicant' (with 'Community Development' selected) and 'Sub-Project' (with '- Please Select -' selected). There is a plus sign button next to the 'Sub-Project' dropdown. At the bottom right, there is an 'Assign' button.





Objectives

- 1 Open the Objectives Page for a project by selecting Objectives in the Project Management Menu the objectives grid by selecting **Objectives** from the **Blue Ribbon Bar**



- 2 Select **+New** to add a new objective

- 3 Enter objective data, select a project manager, and set the objective start & end dates, then select the **Save** icon

Add Objective

Objective Detail Attachment

* = Required Fields

Objective Name *

Objective Description *

Project Manager *

Please Select

Objective Number *

Reference Number

Objective Start Date *

10/1/2014

Objective End Date *

9/30/2019

Select the calendar to the right of the date fields to quickly adjust start and end dates. Objective start and end dates may not exceed the start and end dates of the grant or project

- 4 Select the **Attachments** tab to upload supplemental documentation with the Objective Select **+Add Attachment** and follow on-screen prompts

Add Objective

Objective Detail Attachment

Attachment

Author

Date

+ Add Attachment





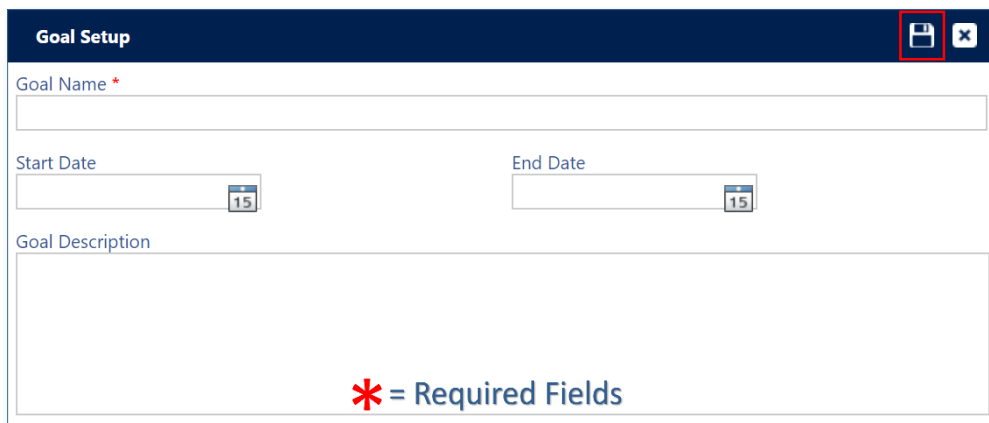
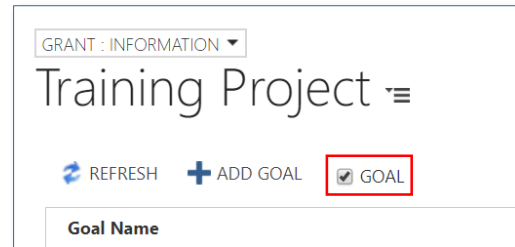
Goals

- 1 **Goal:** In GrantVantage, Objectives may be attributed to individual project goals in support of the project

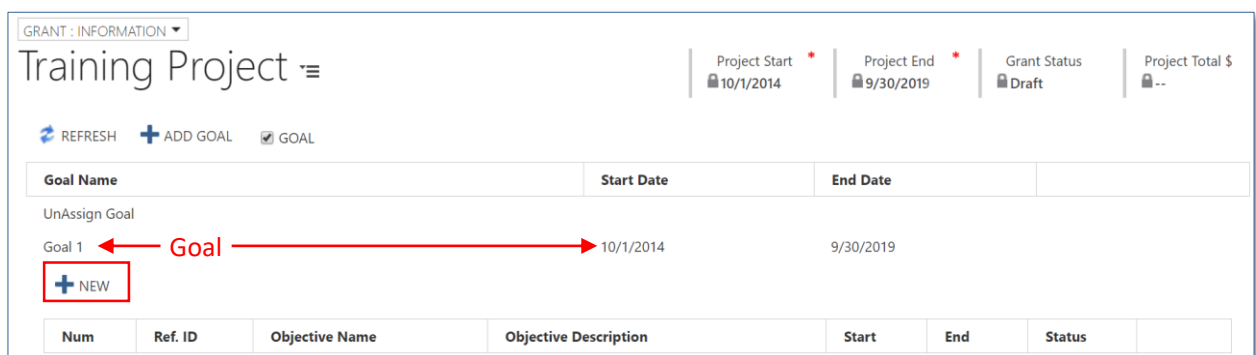
To enter a Goal, first select the Goal checkbox

Then select 

Enter Goal details, then save



- 2 Objectives attributed to the Goal may be added once the goal is saved



Num	Ref. ID	Objective Name	Objective Description	Start	End	Status



Performance Measures

- 1 Select the objective to add a Performance Measure then select **+New** next to **Performance Measure**

GRANT : INFORMATION

GV - Tutorial Project

Project Start * 10/1/2015 Project End * 9/30/2017 Grant Status Active Project Total \$ --

+ NEW ACTIVATE REFRESH

Num	Ref. ID	Objective Name	Objective Description	Start	End	Status
100	1	Program Promotion, Outreach, and Recruitment	Basic Description	10/1/2015	9/30/2017	Draft

Performance Measure (0) + NEW

Grant Activities (0) + NEW

- 2 Enter all Performance Measure data, select the Type of Measure – Currency, Milestone, Narrative, Number, Percentage or Percent Increase – enter all Measure details, then save

Performance Measure

Measure Details

Measure Description *
Enter Performance Measure Description in this Field

Type of Measure *
Number

Owner *
Grant Vantage

Start Date *
10/1/2015

End Date *
9/30/2020

Reference ID
001

Planned *
Actual

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

Currency
Milestone
Narrative
Number
Percentage
Percent Increase

Results
Actual
Task Management

* = Required Fields

i If the measure status is **In Progress** users may add actual values for all money, number, and percentage types of measures. For milestone measures, users will select the Measure Status from a dropdown





Activities

- 1 Select the Objective you wish to add an **Activity** to, then select **+New** next to **Grant Activities**

GRANT : INFORMATION

GV - Tutorial Project

Project Start * 10/1/2015 Project End * 9/30/2017 Grant Status Active Project Total \$ --

+ NEW ACTIVATE REFRESH

Num	Ref. ID	Objective Name	Objective Description	Start	End	Status
100	1	Program Promotion, Outreach, and Recruitment	Basic Description	10/1/2015	9/30/2017	Draft

Performance Measure (0) + NEW

Grant Activities (0) + NEW

- 2 Enter all Activity data, select the Owner, and set start and due dates.
If the activity is in progress or has a status other than Not Started, select the Status
If the Activity will be handled by a Sub-Recipient or Project Partner, use the **Assignee** picklists to select

Grant Activity

Activity Detail Attachment

* = Required Fields

Grant Activity Details

Activity Description *

Start Date * 10/1/2015 Due Date * 9/30/2020 Status Not Started

Owner * Please Select Show on Dashboard Ref. ID

Assignee Type No Assignee

Assignee

Activity Detail Attachment

Select the **Attachment Tab** to add any desired supplemental documentation



Activity Status options include:

Not Started
Pending
In Review
In Progress
Needs Approval
Completed
Stalled





Objectives, Performance Measures and Activities that have been *activated* may no longer be altered without first submitting an Objective Change Request to your GrantVantage Administrative User

Create & Submit an Objective Change Request

- 1 Select the approved objective, then select **Request Change**

+ NEW	REQUEST CHANGE	VIEW CHANGES	DEACTIVATE	REFRESH		
Num	Ref. ID	Objective Name	Objective Description	Start	End	Status
100	1	Coordinated Well Child Care	Daily infant and toddler observations by EHS & parents, quarterly developmental assessments.	10/1/2015	9/30/2017	Approved
Performance Measure (2)		+ NEW				
Grant Activities (1)		+ NEW				

- 2
 - Select the section of the Objective in which a change is needed
 - Enter desired changes
 - Enter a Change Justification (purpose of request)
 - Select Request Change

Objective Request Change

Grant: Training Project - VR

Select the Objective you wish to modify

Implement, scale, sustain one existing NexGen iSC.

Requested Changes

☐ Objective Name
Implement, scale, sustain one existing NexGen iSC.

☐ Objective Description
NexGen will be a demonstration model of government led iSC improvements of immunization outputs.

☐ Objective Start Date
3/1/2016

☒ Objective End Date
01/19/2018

Change Justification *
Adjusted End Date

Cancel Change Request Change





Performance Measure Change Requests

- 1 To view & Request Performance Measure Change Requests select the performance measure then select **Request Change**

+ NEW REQUEST CHANGE VIEW CHANGES DEACTIVATE REFRESH							
Num	Ref. ID	Objective Name	Objective Description	Start	End	Status	
100		Implement, scale, sustain one existing NexGen iSC.	NexGen will be a demonstration model of government led iSC improvements of immunization outputs.	3/1/2016	2/28/2018	Approved	
Performance Measure (1) + NEW REQUEST CHANGE VIEW CHANGES ASSIGN							
Performance Measure			Type	Planned	Actual	Status	
Scaling and sustaining Mozambique immunization Program			Milestone			Not Started	
Grant Activities (1) + NEW							

Performance Measure Request Change

Objective : Implement, scale, sustain one existing NexGen iSC.
Select the Performance Measure you wish to modify
Scaling and sustaining Mozambique immunization Program

Requested Changes

☐

Measure Description
Scaling and sustaining Mozambique immunization Program

☐

Measure Start Date
3/1/2016

☒

Measure End Date
2/01/2018

☐

Type of Measure
Milestone

Change Justification *

Change End Date of Measure

Cancel Change

Request Change





Activity Change Requests

- 1 To view & Request Activity Change Requests select the activity then select Request Change

+ NEW REQUEST CHANGE VIEW CHANGES DEACTIVATE REFRESH							
Num	Ref. ID	Objective Name	Objective Description	Start	End	Status	
100		Implement, scale, sustain one existing NexGen iSC.	NexGen will be a demonstration model of government led iSC improvements of immunization outputs.	3/1/2016	2/28/2018	Approved	
Performance Measure (1) + NEW							
Grant Activities (1) + NEW REQUEST CHANGE VIEW CHANGES ASSIGN							
Grant Activity				Start	Status	Due Date	
Develop Data System to track immunization outputs				3/1/2016	In Progress	2/28/2018	

Activity Request Change

Objective: Implement, scale, sustain one existing NexGen iSC.

Select the Grant Activity you wish to modify

Develop Data System to track immunization outputs

Requested Changes

☐ Activity Description
Develop Data System to track immunization outputs

☐ Activity Start Date
3/1/2016

☒ Activity Due Date
2/1/2018

Change Justification *

Change End Date

Cancel Change Request Change





Sub-Activities

Sub-Activities allow users to track tasks and appointments associated with objective activities and may be added once the activity is saved

Sub-Activities may be added from within the Dynamic Dashboards, The Objectives Page or by selecting the Quick Create **+** on the GrantVantage Home Page

Once a Sub-Activity is created and assigned, the assignee will receive an Email Notification regarding the assigned Sub-Activity

- 1 To add Sub-Activity, double-click on the Objective Activity to which it will be added

GRANT : INFORMATION

Gv Tutorial

Project Start 10/1/2015 Project End 9/30/2017 Grant Status Active Project Total \$ \$245,000

+ NEW REQUEST CHANGE VIEW CHANGES DEACTIVATE REFRESH

Num	Ref. ID	Objective Name	Objective Description	Start	End	Status
100	1	Coordinated Well Child Care	Daily infant and toddler observations by EHS & parents, quarterly developmental assessments.	10/1/2015	9/30/2017	Approved
Performance Measure (2) + NEW						
Grant Activities (1) + NEW REQUEST CHANGE VIEW CHANGES ASSIGN						
Grant Activity				Start	Status	Due Date
Conduct Smile Curriculum Classes				10/1/2015	Not Started	9/30/2017
Assignees (3)						
200	2	Individualized Family Service Plans	Develop IFSP for each participating family	10/1/2015	9/30/2017	Approved

- 2 At the bottom of the Activity Window expand the Sub-Activities section

Grant Activity

Grant Activity Details

Activity Description *
Conduct Smile Curriculum Classes

Start Date * 10/1/2015 Due Date * 9/30/2017 Status Not Started

Owner * Chris James Show on Dashboard ☒

Assignee Type No Assignee

Assignee

Sub-Activities

Grant Activity

Grant Activity Details

Activity Type Subject Assigned To Due Date Status

Appointment Meet with R.B.G. Sequoyah Stamps 01/24/2017 Scheduled





3

Select **Actions** then select the type of Sub-Activity you wish to create
Sub-Activity Options include:

Appointment

When adding an appointment, an email with a calendar invite will be sent to all contacts entered with a valid email address

Enter the contact name in the **Appointment With** field, enter appointment details, then Save

The screenshot shows the 'Grant Activity' window with the 'Sub-Activities' section. A table lists activities, and the 'Appointment' row is selected. The 'Actions' dropdown menu is open, showing options like 'Appointment', 'Add Sub-Activity', 'Rescheduling Appointment', and 'Mark Complete'. A hand cursor is pointing at the 'Appointment' option. Below this, the 'Appointment' form is displayed, featuring fields for 'Subject', 'Appointment Owner' (set to 'Sequoyah Stamps'), 'Status' (set to 'Scheduled'), 'Appointment With', 'Start Time' (02/09/2017 12:32am), 'End Time' (02/09/2017 1:32am), 'Location', and 'Appointment Note'. A red asterisk indicates required fields. A legend at the bottom right states '* = Required Fields'.

Activity Type	Subject	Assigned To
Appointment	Meet with R.B.G.	Sequoyah Stamps

Appointment

Subject *

Appointment Owner

Status

Appointment With *

Start Time *

End Time *

Location *

Appointment Note *

* = Required Fields



For Users with the Outlook Connector installed and connected to GrantVantage, the appointment will automatically appear in the connected Outlook Calendar





Recurring Appointment

- 1 Adding a recurring appointment is very similar to adding a regular calendar appointment, the only difference being the bottom of the form allows users to determine the recurrence pattern, the start date, and the end date or final number of recurrences

Grant Activity

Grant Activity Details

Sub-Activities

Activity Type	Subject	Assigned To	Appointment	Add Sub-Activity
Appointment	Meet with R.B.G.	Sequoyah Stamps	Recurring Appointment	Mark Complete

Actions

Appointment

Recurring Appointment

Task

* = Required Fields

Recurring Appointment

Details

Subject *

Appointment Owner

Status

Sequoyah Stamps

Scheduled

Appointment With *

Start Time *

End Time *

12:33am

1:33am

Location *

Appointment Note *

Recurring Appointment

Location *

Appointment Note *

Recurrence Pattern

Daily

Every 1 day(s)

Every weekday

Range of Recurrence

Start range *

02/09/2017

No End Date

End after 1 occurrences

End by 02/09/2017





Task

- 1 Identify specific actions a user must complete

Grant Activity

Grant Activity Details

Sub-Activities

Activity Type	Subject	Assigned To		
Appointment	Meet with R.B.G.	Sequoyah Stamps	Appointment	Add Sub-Activity
			Recurring Appointment	Mark Complete
			Task	

Task

Subject *

Assigned To * Sequoyah Stamps

Status Not Started

Due Date * 02/09/2017 12:33am

Task Note *

* = Required Fields

- 2 When an Appointment or Task is complete, select **Actions** then select Mark Complete
This will remove the Sub-Activity from the list

Grant Activity

Grant Activity Details

Sub-Activities

Activity Type	Subject	Assigned To	Due Date	Status	
Appointment	Meet with R.B.G.	Sequoyah Stamps	01/24/2017	Sc	Add Sub-Activity
					Mark Complete



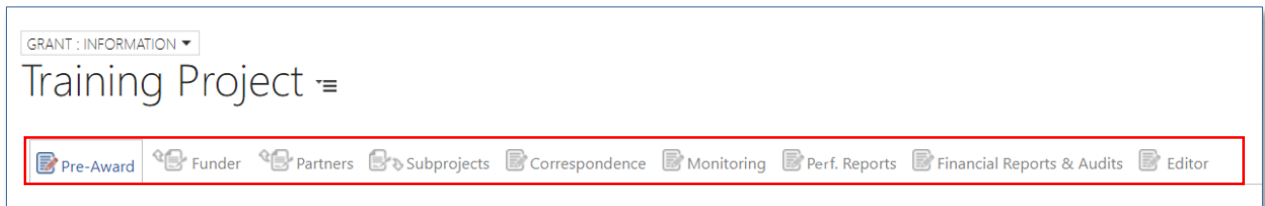
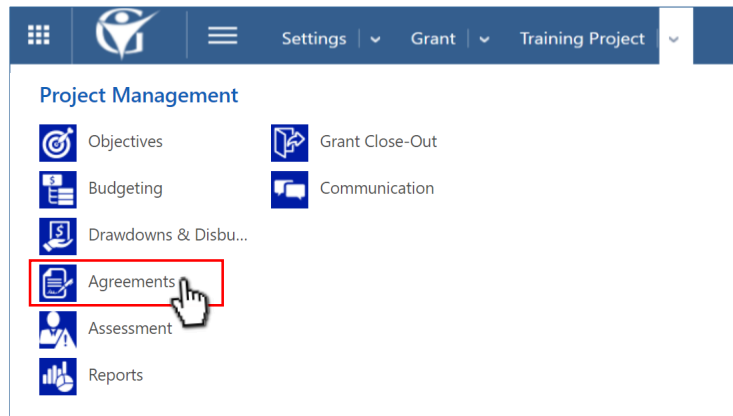
Sub-Activities may be added to *saved* Objective Activities at any time throughout the lifecycle of the Project



Agreements

The **Agreements** Page is the library where users can store, create, edit & export documents related to a project

- 1 To access the Agreements page for a specific project, select Agreements in the Project Management Menu



- 2 To upload a document, select the tab that is most relevant to its content

Pre-Award	Application & Other Pre-Award documentation
Funder	Agreements & Documents related to the Project Funder
Partners	Agreements & Documents related to Project Partners
Subprojects	Agreements & Documents related to Sub-Project
Correspondence	Emails & other correspondence related to the project
Monitoring	Site Monitoring documentation
Perf. Reports	Performance Report documents
Financial Reports & Audits	Financial Report document
Editor	Project Document creation & editing tool



3

Select Upload Document

GRANT INFORMATION
Training Project

Project Start 10/1/2014 Project End 9/30/2019 Grant Status Draft Project Total \$

Pre-Award Funder Partners Subprojects Correspondence Monitoring Pref. Reports Financial Reports & Audits Editor

Document Name	Document Owner	Document Date	E-Sign ID	Envelope ID	Envelope Status	Status	Last Status Check	Created On	Created By
UPLOAD DOCUMENT									

UPLOAD DOCUMENT

Users may upload any document type as indicated by the **Upload Document** form
Identify the Revenue Source, Partner, or Sub-Project to associate the document with

Upload Document

Agreement With *
Administration for Children & Families

Agreement Start Date *
10/01/2015

File *
Choose File No file chosen

(only file type .xlsx, .xls, .xml, .csv, .pdf, .doc, .docx, .b)

Upload Document

Agreement With *
Administration for Children & Families
Revenue Sources
Administration for Children & Families

File *

Set the agreement start and end dates
Select Choose File, select the document to upload, and then save

Upload Document

Agreement With *
Administration for Children & Families

Agreement Start Date *
10/01/2015

Agreement End Date *
09/30/2017

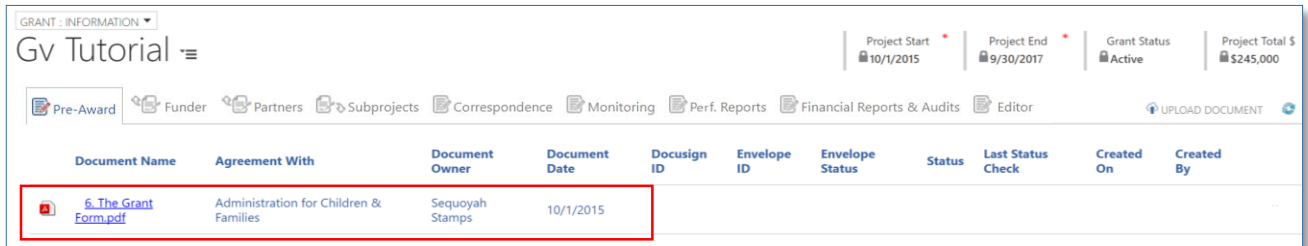
File *
Choose File No file chosen

(only file type .xlsx, .xls, .xml, .csv, .pdf, .doc, .docx, .bmp, .gif, .img, .jpg, .jpeg, .png are allowed)



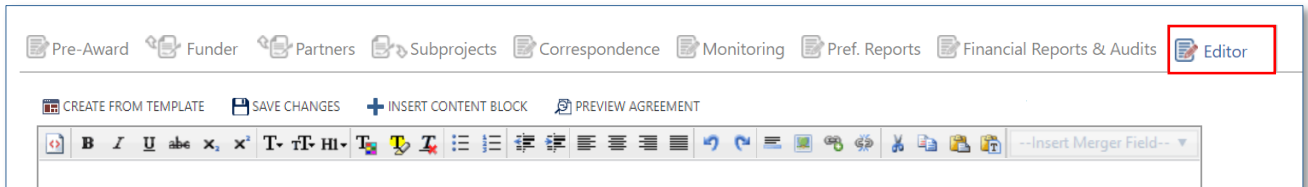


- 4 Once a document is uploaded, it will appear in the selected tab under **Document Name**

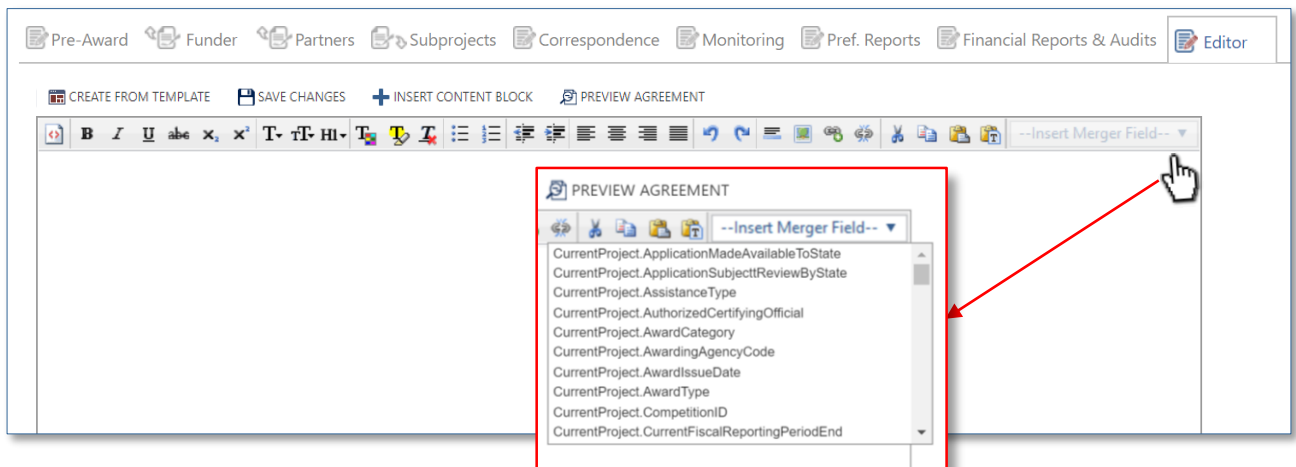


Document Name	Agreement With	Document Owner	Document Date	DocuSign ID	Envelope ID	Envelope Status	Status	Last Status Check	Created On	Created By
6. The Grant Form.pdf	Administration for Children & Families	Sequoyah Stamps	10/1/2015							

- 5 The **Agreement Editor** is a versatile tool enabling users to create customized contracts or other documents throughout the lifetime of the project
Select the **Agreement Editor** tab to access this feature



Users may write and format project documents with this tool, similarly to composing an email
Use the **Formatting Toolbar** to customize agreements and other documents
Users may add images, copy and paste text, size and color fonts, create bulleted or numbered lists using this feature



Users may input **Merge Fields** that access specific project data for easy, re-usable templates and real-time data

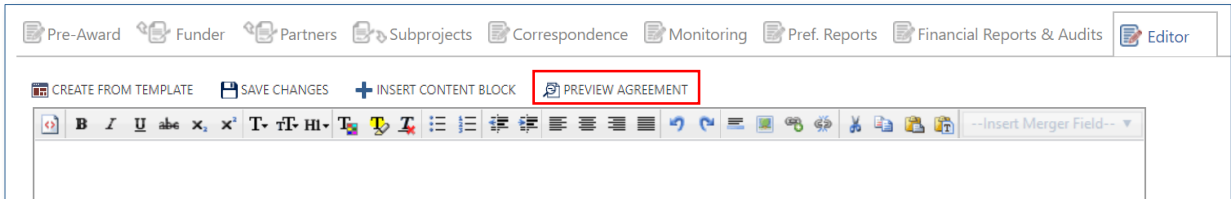




6

Use the **Preview Agreement** feature to review how agreements and other documents will appear before saving them as templates or PDFs

This feature will also indicate how the document will appear once the **Merge Field** data is populated from your GrantVantage projects

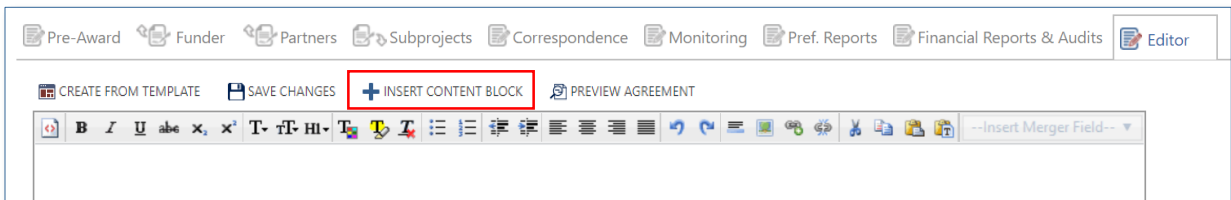


7

Create and Add Content Blocks to save or lock specific contract language

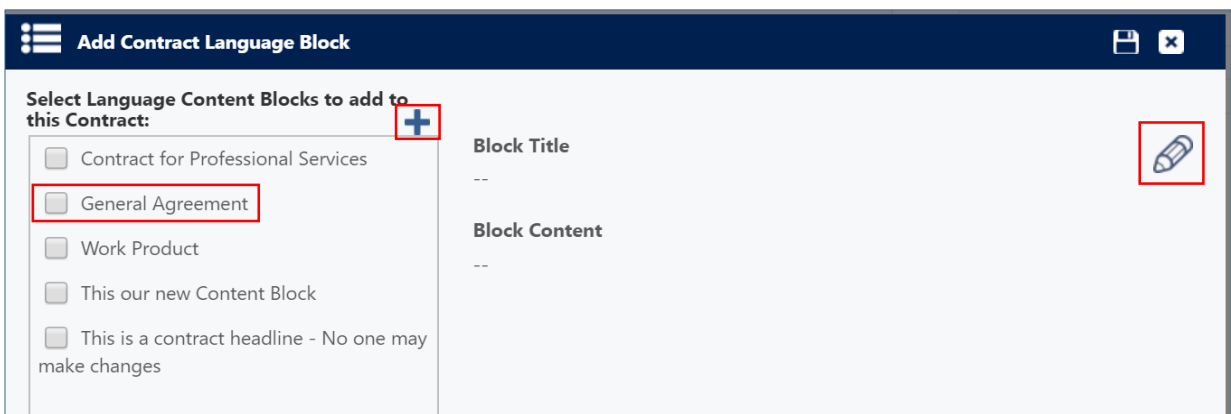
Select **+ Insert Content Block** to add then the plus sign to create a new content block

It is best to select the exact spot in the agreement editor you wish the content language to appear before adding it to the document

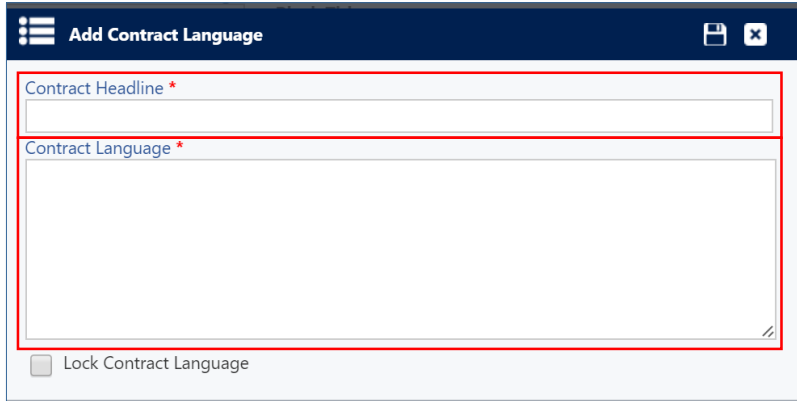


To add a new content block select the  button

To edit an existing content block, select it, then select the  button

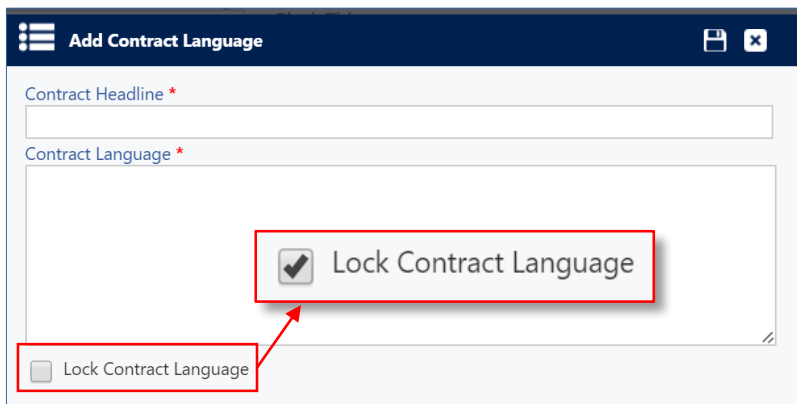


- 8 When adding contract language, enter a **Contract Headline** and the text you wish to appear beneath the heading in the **Contract Language** section



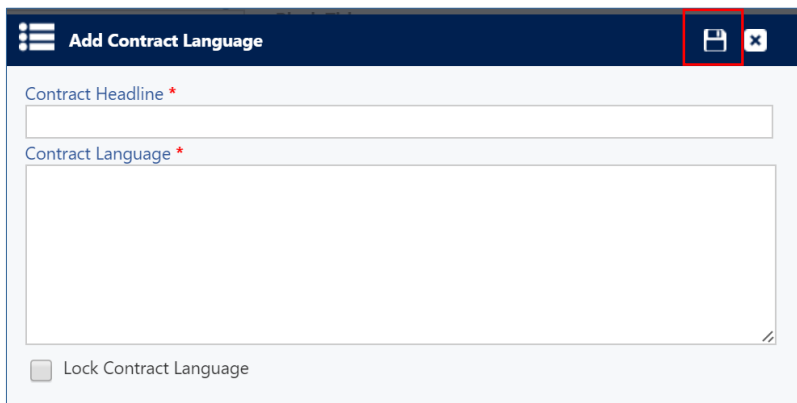
The screenshot shows the 'Add Contract Language' form. A red rectangular box highlights the 'Contract Headline' text input field and the 'Contract Language' text area below it. The 'Lock Contract Language' checkbox is visible at the bottom but is not highlighted.

To **Lock Contract Language** to ensure sub-recipients or contractors are unable to change any contract language when passing down templates to sub-projects



The screenshot shows the 'Add Contract Language' form. A red rectangular box highlights the 'Lock Contract Language' checkbox, which is now checked. A red arrow points from the bottom 'Lock Contract Language' checkbox to the checked one in the middle of the form.

Select save when all block contract language is complete



The screenshot shows the 'Add Contract Language' form. A red rectangular box highlights the save icon (a floppy disk) in the top right corner of the form's header.



- 9 Select one or more content blocks in order to add them to an agreement or document, then select **Save**

Add Contract Language Block

Select Language Content Blocks to add to this Contract:

- ☒ Contract for Professional Services
- ☐ General Agreement
- ☐ Work Product

Block Title
Contract for Professional Services

Block Content
This contract executed by Janson Consulting on the date indicated below between Native Strategies & Janson Consulting hereafter referred to as the Contractor, to secure professional services of the contractor to provide services for Native Strategies.

- 10 Once an agreement or document is complete, save changes

Pre-Award Funder Partners Subprojects Correspondence Monitoring Pref. Reports Financial Reports & Audits Editor

CREATE FROM TEMPLATE **SAVE CHANGES** + INSERT CONTENT BLOCK PREVIEW AGREEMENT

Contract Agreement

Contract for Professional Services
This contract executed by ##CurrentProject.GranteeApplicant## on the date indicated below between ##SubProject.Organization## hereafter referred to as the Contractor, to secure professional services of the contractor to provide services for Native Strategies.

General Agreement
1. General agreement stating terms and expectations for products or services provided by the above referenced company.
2. A detailed list of pay rates, performance dates and expectations are included in Appendix A.

Work Product
3. Independent Contractor Relationship. Consultant's relationship with Client will be that of an independent contractor, and nothing in this Agreement is intended to, or should be construed to, create a partnership, agency, joint venture, or employment relationship. No part of Consultant's compensation will be subject to withholding by Client for the payment of any social security, federal, state, or any other employee payroll taxes.
4. Ownership of Work Product. Consultant agrees that all work product developed by her alone or in conjunction with others in connection with the performance of services pursuant to this Agreement is and shall be the sole property of Client, and Consultant shall retain no ownership, interest, or rights therein. Work product includes but is not limited to reports, graphics, memoranda, slogans, and taglines.

Agreement with: Administration for Children & Families
Agreement Start Date: 08/25/2016
Agreement End Date: 09/25/2016
☐ Overwrite existing pdf
☒ WORD AGREEMENT ☐ PDF AGREEMENT

- 11 To access a saved template, select **Create From Template** from the **Agreement Editor** tab

Pre-Award Funder Partners Subprojects Correspondence Monitoring Pref. Reports Financial Reports & Audits Editor

CREATE FROM TEMPLATE **SAVE CHANGES** + INSERT CONTENT BLOCK PREVIEW AGREEMENT

CREATE FROM TEMPLATE





12 Select desired template then select **Save**

Templates

Select the Project Agreement Template you wish to use

- Award Letter - Appendix A Attachment
- Contract Agreement - Appendix A Attachment
- Contract Agreement - Demo**
- Contract Agreement inc: Appendix A
- Data Collection Sheet
- Demo Template

Template Preview

GrantVantage
EASY • POWERFUL • COMPLETE

Contract Agreement

Contract for Professional Services

This contract executed by ##CurrentProject.GranteeApplicant## on the date indicated below between ##SubProject.Organization## hereafter referred to as the Contractor, to secure professional services of the contractor to provide services for Native Strategies.

General Agreement

13 When an agreement or document is complete, ready for export or to be passed on to its intended parties, select the Revenue Source, Partner, or Sub-Project for whom it is intended

Agreements with Revenue Sources | Agreements with Partners | Agreements with my Sub-Projects | **Agreement Editor** | Other Documents

CREATE FROM TEMPLATE | SAVE CHANGES | INSERT CONTENT BLOCK | PREVIEW AGREEMENT

Agreement with: *

- Administration for Children & Families
- Revenue Resource
- Administration for Children & Families**
- Partners
- Native Action Network
- Sub-Projects
- Sub-Award: AIHC - Native Parenting
- Contractor: Janson - Native Parenting

WORD AGREEMENT | PDF AGREEMENT

Agreement with: *

Administration for Children & Families

Agreement Start Date *

08/25/2016

Agreement End Date *

09/25/2016

☐ Overwrite existing pdf

☒ WORD AGREEMENT ☒ PDF AGREEMENT





14

Select the Agreement Start and End Dates and whether or not to overwrite a previous existing document with the selected organization by selecting Overwrite Existing PDF

Agreements with Revenue Sources | Agreements with Partners | Agreements with my Sub-Projects | Agreement Editor | Other Documents

CREATE FROM TEMPLATE | SAVE CHANGES | SAVE AS TEMPLATE | INSERT CONTENT BLOCK | PREVIEW AGREEMENT

GrantVantage
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Contract Agreement

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Work Product

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4. Ownership of Work Product. Consultant agrees that all work product developed by her alone or in conjunction with others in connection with the performance of services pursuant to this Agreement is and shall be the sole property of Client, and Consultant shall retain no ownership, interest, or rights therein. Work product includes but is not limited to reports, graphics, memoranda, slogans, and taglines.

Agreement with: *
Administration for Children & Families

Agreement Start Date *
08/25/2016

Agreement End Date *
09/25/2016

☒ Overwrite existing pdf

☐ WORD AGREEMENT ☒ PDF AGREEMENT

15

When all information is properly entered, select the preferred document type (Word Agreement or PDF Agreement)

Agreements with Revenue Sources | Agreements with Partners | Agreements with my Sub-Projects | Agreement Editor | Other Documents

CREATE FROM TEMPLATE | SAVE CHANGES | SAVE AS TEMPLATE | INSERT CONTENT BLOCK | PREVIEW AGREEMENT

GrantVantage
EASY • POWERFUL • COMPLETE

Contract Agreement

Contract for Professional Services
This contract executed by ##CurrentProject.GranteeApplicant## on the date indicated below between ##SubProject.Organization## hereafter referred to as the Contractor, to secure professional services of the contractor to provide services for Native Strategies.

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Work Product

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4. Ownership of Work Product. Consultant agrees that all work product developed by her alone or in conjunction with others in connection with the performance of services pursuant to this Agreement is and shall be the sole property of Client, and Consultant shall retain no ownership, interest, or rights therein. Work product includes but is not limited to reports, graphics, memoranda, slogans, and taglines.

Agreement with: *
Administration for Children & Families

Agreement Start Date *
08/25/2016

Agreement End Date *
09/25/2016

☐ Overwrite existing pdf

☒ WORD AGREEMENT ☐ PDF AGREEMENT

16

A window will appear asking for the document title, document margins, paper size, and orientation. Choose to number pages and/or omit numbering the title page

Settings

Agreement file name *

Margin Top (inch) .5

Margin Left (inch) .5

Margin Right (inch) .5

Margin Bottom (inch) .5

Page Size A4

Page Orientation Portrait

☒ Insert page number on agreement ☒ show page number on first page



CREATE AGREEMENT





17

Select **Create Agreement** and GrantVantage will store the agreement under the appropriate tab as determined by the **Agreement With** selection (Agreements with Revenue Sources, Agreements with Partner, etc.)

 **Settings** 

Agreement file name *

Margin Top(inch)

.5

Margin Left(inch)

.5

Margin Right(inch)

.5

Margin Bottom(inch)

.5

Page Size


A4

Page Orientation

Portrait

☒ Insert page number on agreement

☒ show page number on first page

 **CREATE AGREEMENT**





Notes & Attachments

The Notes & attachments section appears in All Project Forms and nearly every information form or record in GrantVantage.

Notes & Attachments allows users to add information and attach documents necessary to the project or information record

- 1 To add Notes & Attachments, anywhere you see this section simply begin by typing into the **Enter a note** field.

Notes & Attachments

NOTES

Enter a note

No Notes found.

- 2 In this field, users may add a note title and if desired, attach a document. Similarly to attaching a document in an email, select Attach, Choose File, and then select the desired document from the user's computer

Notes & Attachments

NOTES

Title

Attach Choose File No file chosen Done

- 3 Once finished entering Notes/Attachments, select **Done** and the information will be saved

Notes & Attachments

NOTES

Enter a note

The Snail River Salmon Project
Salmon Harvest Project Notes

3 Salmon Harvest Project (Final).docx
Jazzy James - Today 9:45:44 PM





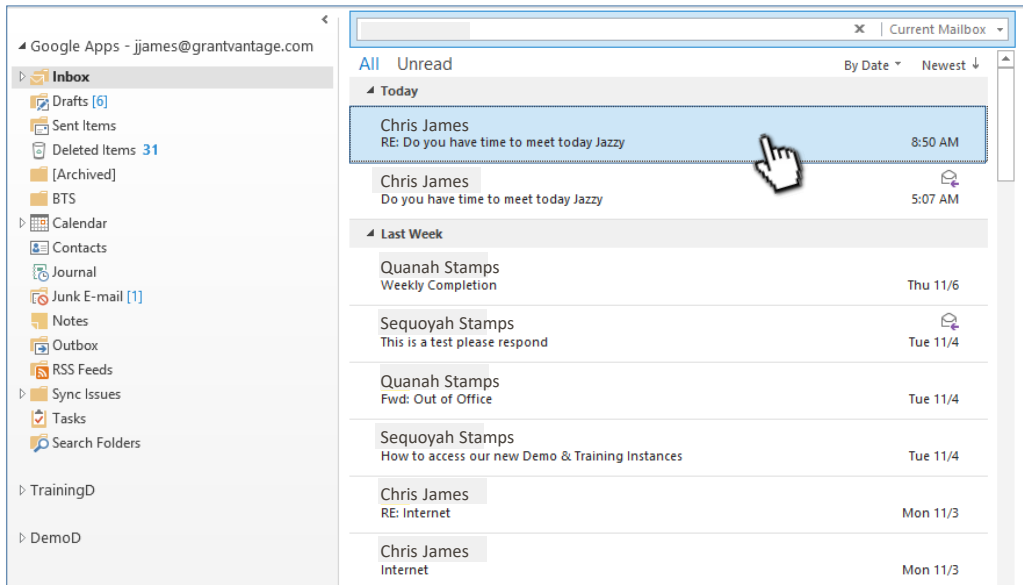
Email Tracking

Learn how to track emails in GrantVantage Through Outlook
GrantVantage enables users to track emails and link them to specific Projects and Contacts within GrantVantage

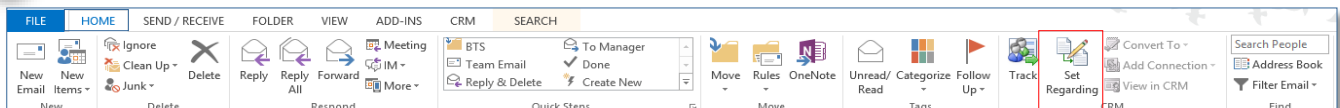


Users must have the Outlook Connector installed in order to track Emails

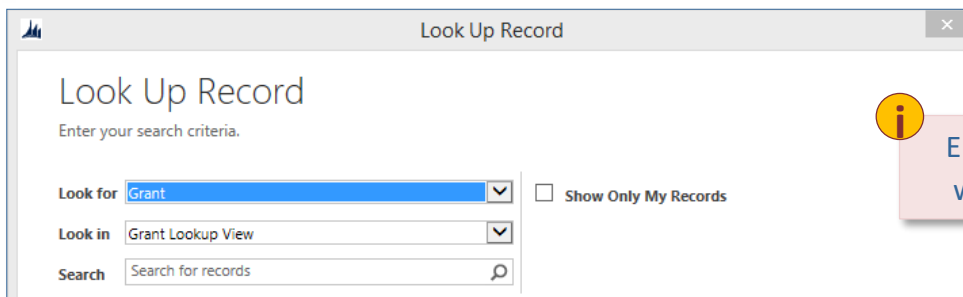
- 1 To track an email within Microsoft Outlook and link it to a specific project form, Select the email you wish to track from Outlook



- 2 At the top of Outlook, in the **Home Tab**, select **Set Regarding**



- 3 After selecting **Set Regarding**, the **Record Look Up Window** will appear



Emails cannot be associated with more than one record





- Use the **Look Up Record** tool to search & select the type of GrantVantage record you wish to link the email to in the **Look For** section such as grant, sub-project or contact
- The **Look In** section will automatically populate based on the **Look For** selection
- In the **Search** section, enter keywords to locate the specific record to which the email will be linked or use the scroll bar to manually search the list
- Select the desired Record, then select **Add**

Look Up Record

Enter your search criteria.

Look for: **Grant**

Look in: **Grant Lookup View**

Search: Search for records

☐ Show Only My Records

Grant Project Name	Created On
✓ The Snail River Salmon Project	11/3/2014 12:36 PM
The Empower Project	7/26/2014 10:53 PM
Salmon Harvest Preservation Project	7/26/2014 11:59 PM
Alaska Native Organization Co-Management Funding Pro...	7/29/2014 11:57 AM
Bristol Bay Salmon Project	7/30/2014 12:11 PM
Kodiak Salmon Project	7/30/2014 12:21 PM
Sand Point Salmon Project	7/30/2014 12:21 PM

1 - 14 of 14 (1 selected)

Page 1

New Add Cancel Remove Value

Once added, the record will appear at the bottom of the email

Microsoft Dynamics CRM

Regarding: [The Snail River Salmon Project](#)

This email is being tracked in CRM.

Related records:

- [Dave Donalds](#)
- [Sequoyah Stamps](#)





GRANT : INFORMATION ▾

Training Project ▮

- ▶ Key Dates
- ▶ Grant Details
- ▶ Grantee Info
- ▶ Revenue Source(s)
- ▶ Project Plan
- ▶ Sub-Projects
- ▶ Email Correspondence
- ▶ Notes & Attachments
- ▶ Other
- ▶ Reports
- ▶ Grant Users

To view emails being tracked against a project or contact, open the Project or Contact Form in GrantVantage, then select the **Email Correspondence** section

The email will appear in the table as shown below

Email Correspondence

Sent Emails

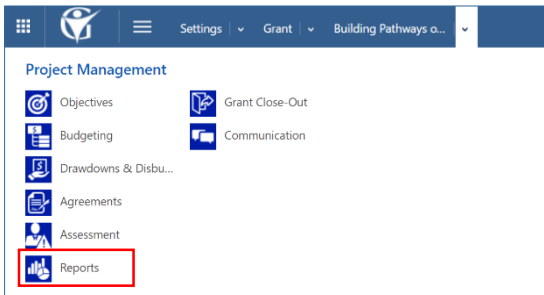
To	Subject	Regarding	Priority	Actual End ↑
Dave Donalds...	RE: Do you have time to meet today Jazzy	The Snail ...	Normal	11/11/2014




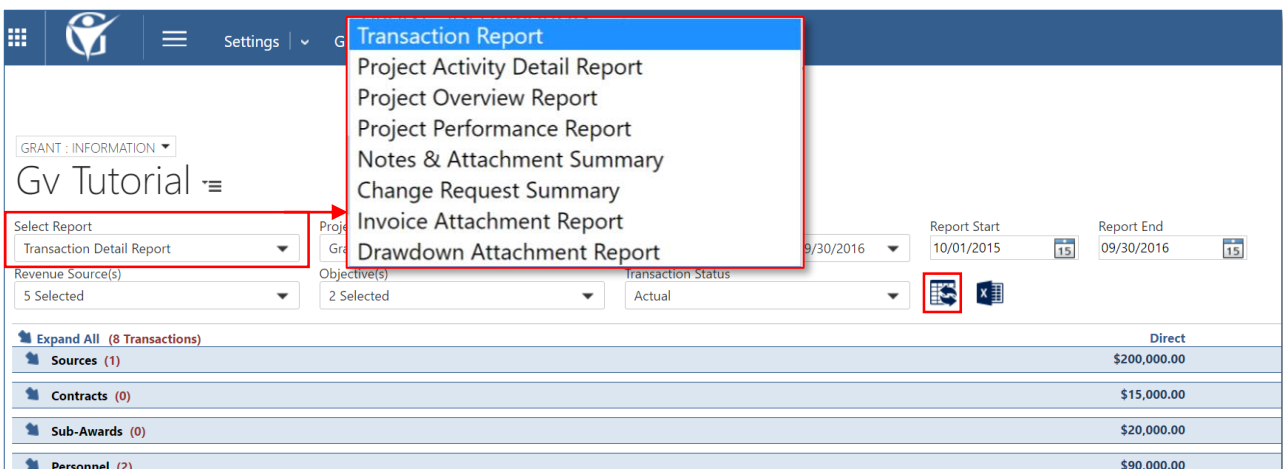


View Project Reports

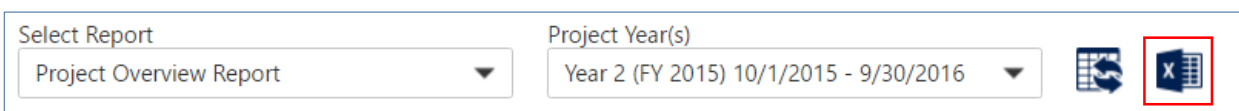
- 1 In the **Project Management Menu**, select **Reports** to open the Reporting Page



- 2 In the **Reporting Page**, use the **Select Report** picklist to choose the Report you wish to view then select  to load the selected report



- 3 Any Report may be **exported to MS Excel** by selecting 



The following pages will display all **Project Reports** available in GrantVantage





Transaction Report: A detailed report of all direct, cash match, in-kind, and leveraged resource transactions entered in a project



Sort by Project, Project Year, Report Start Date, Report End Date, Revenue Source, Objective, Transaction Status

GRANT INFORMATION

Gv Tutorial

Select Report

Transaction Detail Report

Revenue Source(s)

5 Selected

Project

Grant: Gv Tutorial

Objective(s)

2 Selected

Project Year(s)

Year 1 (FY 2016) 10/1/2015 - 9/30/2016

Transaction Status

Actual

Report Start

10/01/2015

Report End

09/30/2016

Expand All (7 Transactions)

Sources (1)

Grant Funder: Administration for Children & Families

Partner: Native Action Network

08/24/2016Native Action Network

Partner: Native Action Network - Balance

Partner: Native Action Network - Expense Totals

Partner: Native Action Network - Balance

Grantee: Native Strategies

Grantee: Native Strategies - Expense Totals

Grantee: Native Strategies - Balance

Personnel (1)

Project Manager (1)

10/16/20150011

Project Manager - Balance

Project Assistant (0)

Personnel - other (0)

Personnel - Expense Totals

Personnel - Balance

Fringe Benefits (1)

10/16/20150012Native Strategies

Fringe Benefits - Balance

Fringe Benefits - Expense Totals

Fringe Benefits - Balance

Supplies (3)

10/16/20150013Multipurpose Vendor

08/25/20161156

08/25/20161175Native Action Network (Professional Services)

Contr. IDContributing PersonReported onStartEndHourly RateHoursValue

CO 100057Iris Tuesday8/25/201610/15/20159/30/2016120\$10.00\$1,200.00

Supplies - Balance

Supplies - Expense Totals

Supplies - Balance

Travel (2)

10/16/20150014

08/25/20161103

IDDescriptionSr. NoStatusValue

IN 1000181 Laptop00123456Issued to Recipient\$500.00

Travel - Balance

Travel - Expense Totals

Travel - Balance

Indirect Cost

Indirect Cost - Expense Totals

Indirect Cost - Balance

Total Expense

Total Actual Expense

Total Planned Expense

Total Obligated Expense

Total Overall Expenses

Balance

Report Start Date, Report End Date, Revenue Source, Objective, Transaction Status

Total \$5,000.00

Direct	Cash Match	In-Kind Match	Leveraged
\$200,000.00	\$25,000.00	\$20,000.00	\$5,000.00
\$200,000.00	\$15,000.00	\$10,000.00	
	\$5,000.00		
\$0.00	\$10,000.00	\$10,000.00	\$0.00
		\$1,200.00	\$0.00
		\$8,800.00	\$0.00
	\$10,000.00	\$10,000.00	\$5,000.00
		\$0.00	\$0.00
		\$10,000.00	\$5,000.00
\$90,000.00	\$19,500.00		
\$51,500.00	\$8,000.00		
	\$4,000.00		
\$47,500.00	\$8,000.00	\$0.00	\$0.00
\$38,500.00	\$11,500.00		
\$4,000.00	\$0.00	\$0.00	\$0.00
\$86,000.00	\$19,500.00	\$0.00	\$0.00
\$20,000.00	\$1,500.00		
\$1,500.00			
\$18,500.00	\$1,500.00	\$0.00	\$0.00
\$1,500.00	\$0.00	\$0.00	\$0.00
\$18,500.00	\$1,500.00	\$0.00	\$0.00
\$20,682.00	\$4,000.00	\$10,000.00	\$5,000.00
	\$500.00		
	\$200.00		
		\$1,200.00	
Hourly Rate	Hours	Value	
120	\$10.00	\$1,200.00	
\$20,182.00	\$3,800.00	\$8,800.00	\$5,000.00
\$500.00	\$200.00	\$1,200.00	\$0.00
\$20,182.00	\$3,800.00	\$8,800.00	\$5,000.00
\$19,318.00		\$10,000.00	
	\$500.00		
	\$600.00		
Status	Value		
Issued to Recipient	\$500.00		
\$18,218.00	\$0.00	\$10,000.00	\$0.00
\$1,100.00	\$0.00	\$0.00	\$0.00
\$18,218.00	\$0.00	\$10,000.00	\$0.00
\$15,000.00			
	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00
\$200,000.00	\$25,000.00	\$20,000.00	\$5,000.00
\$7,810.00	\$200.00	\$1,200.00	\$0.00
\$5,000.00	\$0.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00
\$12,810.00	\$200.00	\$1,200.00	\$0.00
\$187,190.00	\$24,800.00	\$18,800.00	\$5,000.00





**Project Activity Detail Report:** A detailed Report of Grant Activities and their Status


GRANT : INFORMATION ▾


Gv Tutorial ≡

Select Report
Project Activity Detail Report ▾

Project Year(s)
Year 1 (FY 2016) 10/1/2015 - 9/30/2016 ▾



 Sort by Project Year



Project Activity Detail Report

Project: Gv Tutorial

Project Manager: Sequoyah King

Award No.: ABC123

Reporting Period: 10/1/2015 - 9/30/2016

Project Period: 10/1/2015 - 9/30/2017

Current Period Amount: \$245,000.00

Total Funded Amount: \$245,000.00

Grant Activities

Not Started	2
Pending	0
In Review	0
In Progress	1
Need Approval	0
Completed	0
Stalled	0

Project Goal
This is where the Project Goal is entered.

Project Summary
This is where the Project Summary/Abstract is entered

Objective100: Coordinated Well Child Care

Daily infant and toddler observations by EHS & parents, quarterly developmental assessments.

Project Manager: Sequoyah King

Team: Christopher James

Start Date: 10/1/2015

End Date: 9/30/2017

Grant Activity 1: Conduct 10 Child Development Assessments

Status: In Progress

Assignee: Contractor: Janson - Native Parenting

Owner: Chris James

Grant Activity 2: Conduct Smile Curriculum Classes

Status: Not Started

Assignee: No Assignee

Owner: Chris James

Grant Activities

Not Started	2
Pending	0
In Review	0
In Progress	1
Need Approval	0
Completed	0





Project Overview Report: A detailed Report regarding all Objectives, Grant Activities, Performance Measures and their status

GRANT : INFORMATION ▼

Gv Tutorial ≡

Select Report

Project Overview Report ▼

Project Year(s)

Year 2 (FY 2017) 10/1/2016 - 9/30/2017 ▼



Sort by Project Year



Project Overview Detail Report

Project: Gv Tutorial

Grant Overview

Grant Funder: Administration for Children & Families**Grantee:** Native Strategies**Sub-Project: Contractor :** Janson - Native Parenting**Sub-Project: Sub-Awardee :** AIHC - Native Parenting**Award No.:** ABC123**Project Manager:** Sequoyah King**Project Period:** 10/1/2015 - 9/30/2017**Reporting Period:** 10/1/2016 - 9/30/2017**Current Period Amount:****Total Funded Amount:** \$245,000.00

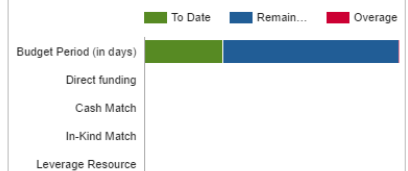
Project Goal

This is where the Project Goal is entered.

Project Summary

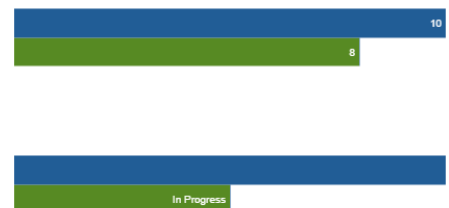
This is where the Project Summary/Abstract is entered

Budget Overview (10/1/2016 - 9/30/2017)



Objective100: Coordinated Well Child Care

Daily infant and toddler observations by EHS & parents, quarterly developmental assessments.

Project Manager: Sequoyah King**Team:** Christopher James**Start Date:** 10/1/2015**End Date:** 9/30/2017**Grant Activity 1:** Conduct 10 Child Development Assessments**Status :** In Progress**Assignee:** Contractor: Janson - Native Parenting**Owner:** Chris James**Grant Activity 2:** Conduct Smile Curriculum Classes**Status :** Not Started**Assignee:** No Assignee**Owner:** Chris James**Grant Activity 3:** Purchase age-appropriate Child Development Assessment tools**Status :** Not Started**Assignee:** Native Action Network**Owner:** Sequoyah King**Measure 1:** Complete 10 Developmental Assessments by end of year 1**Measure Type:** Number**Planned Amount:** 10**Actual Amount:** 8**Assignee:** No Assignee**Owner:** Sequoyah King**Measure 2:** Cultural Adaptations of Child Smile Curriculum**Measure Type:** Milestone**Planned Amount:****Actual Amount:** In Progress**Assignee:** Sub-Award: AIHC - Native Parenting**Owner:** Chris James

**Project Performance Report:** A detailed Report regarding Performance Measures and their status

GRANT : INFORMATION ▾

Gv Tutorial ≡

Sort by Project Year

Select Report
Project Performance Report ▾

Project Year(s)
Year 2 (FY 2017) 10/1/2016 - 9/30/2017 ▾

EASY • POWERFUL • COMPLETE

Project Performance Detail Report

Project: Gv Tutorial

Project Manager: Sequoyah King

Award No.: ABC123

Reporting Period: 10/1/2016 - 9/30/2017

Project Period: 10/1/2015 - 9/30/2017

Current Period Amount:

Total Funded Amount: \$245,000.00

Project Goal
This is where the Project Goal is entered.

Project Summary
This is where the Project Summary/Abstract is entered

Objective Name: Coordinated Well Child Care

Objective Description:
Daily infant and toddler observations by EHS & parents, quarterly developmental assessments.

Project Manager: Sequoyah King

Team: Christopher James

Start Date: 10/1/2015

End Date: 9/30/2017

Measure 1: Complete 10 Developmental Assessments by end of year 1

Measure Type: Number

Planned Amount: 10

Actual Amount: 8

Assignee: No Assignee

Owner: Sequoyah King

Measure 2: Cultural Adaptations of Child Smile Curriculum

Measure Type: Milestone

Planned Amount:

Actual Amount: In Progress

Assignee: Sub-Award: AIHC - Native Parenting

Owner: Chris James

Measure 3: Increase Participation by 50%

Measure Type: Number

Planned Amount: 50

Actual Amount: 0

Assignee: No Assignee

Owner: Sequoyah King



**Notes & Attachments Summary:**

Library of Notes and Attachments posted to the Project Form

GRANT : INFORMATION ▾

Gv Tutorial ≡

Select Report ▾ Notes & Attachment Summary Project ▾ Grant: Gv Tutorial

Project Start 10/1/2015 Project End 9/30/2017 Grant Status Active Project Total \$ \$245,000.00

Sort by Project

Date	Title	Note Summary	Attachment	Author
1/20/2017 12:27 PM	Gv Tutorial Note 1	All notes and attachments should be saved in the grant form whenever important grant or project information must be shared to all users of the system.	Notes and Attachments.pptx	Sequoyah Stamps

Change Request Summary:

A detailed list of all objective, activity, performance measure and budget change requests

GRANT : INFORMATION ▾

Gv Tutorial ≡

Select Report ▾ Change Request Summary Project ▾ Grant: Gv Tutorial Change Request Type ▾ Objective Change Request

Project Start 10/1/2015 Project End 9/30/2017 Grant Status Active Project Total \$ \$245,000.00

Sort by Project, Change Request Type, Project Year

Objective Change Request Summary

Objective Name

Coordinated Well Child Care (1)

Date	Status	Requested By	Justification	Approved/Rejected On	Approved/Rejected By	Approve/Reject Justification
8/26/2016 12:51 PM	Requested	Christopher James	Changed End Date of Objective			

Field Name	Original Value	Requested Value
Objective End Date	9/30/2017	8/30/2017

Invoice Attachment Report:

A detailed list of documents attached to Invoice Transactions

GRANT : INFORMATION ▾

Gv Tutorial ≡

Select Report ▾ Invoice Attachment Report Project ▾ Grant: Gv Tutorial Start Date 10/01/2015 End Date 09/30/2019

Sort by Project & Project Year

Transaction Date	Budget Category	Attachment	Author
11/30/2015	Salary and Benefits	2016.04.18_388-15_Invoice 2.pdf	GrantVantage #
10/31/2015	Salary and Benefits	2016.04.18_388-15_Invoice 1.pdf	GrantVantage #
2/28/2017	Salary and Benefits	2017.03.13_388-16_Invoice 5.pdf	GrantVantage #

Drawdown Attachment Report:

A detailed list of documents attached to Drawdowns, Disbursements & Reimbursements

GRANT : INFORMATION ▾

Gv Tutorial ≡

Select Report ▾ Drawdown Attachment Report Project ▾ Grant: Gv Tutorial Start Date 10/01/2015 End Date 09/30/2019

Sort by Project & Project Year

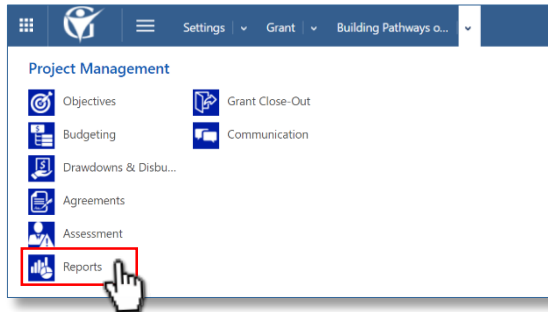
Transaction Date	Budget Category	Attachment	Author
2/28/2017	2013/14 Title II	GV_Drawdown_Report.xls	GrantVantage #
2/28/2017	2013/14 Title II	GV_Transaction_Attachment_Summary.pdf	GrantVantage #
1/31/2017	2013/14 Title II	GV_Drawdown_Report.xls	GrantVantage #





Report Management

- 1 **Report Management** allows users to schedule, track & submit specific Project Reports
Select **Reports** in the **Project Management Menu** to open the page



The **Report Management** tab will display **Pending & Submitted** Report information

Report Management

All + ADD REPORTING

Report Type Report Frequency Reporting Lag(in days)

REFRESH

REFRESH

Export to MS Excel

- 2 To update the status of an existing Report, to attach supplemental documentation, or to Submit the Report for Review, expand the section containing the desired Report & hover your cursor over the desired Reporting Period and select Edit

All + ADD REPORTING



REFRESH


Report Type	Report Frequency	Reporting Lag(in days)			
Performance	Custom	15			
Reporting Period Start	Reporting Period End	Reporting Due Date	Report Filed By	Report Filed On	Report Status
10/1/2015	11/15/2015	11/30/2015			Pending
11/16/2015	12/31/2016	1/15/2017			Pending
Performance	Quarterly	45			





Update Report information as needed, then select Save





Detail

Notes & Attachment(s)

Reporting Period Start	Reporting Period End	Reporting Due Date
5/1/2018	7/31/2018	8/30/2018
Report Filed By	Report Filed On	Reporting Lag (in days)
		30
Report Type	Reporting Frequency	Grant
Performance	Quarterly	DT 0803
Report Reviewed By	Report Reviewed On	Report Risk
		--Select--
Report Status		
Pending		





Detail

Notes & Attachment(s)

Title	File Name
 ADD ATTACHMENT	

