GrantVantage

Training Series

# Sub-Recipient User Guide

# Table of Contents

# 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. |

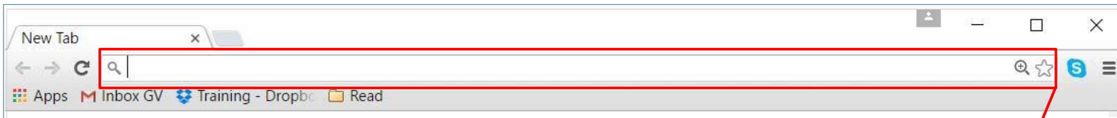
# GrantVantage Terms

| Term | Definition |
|---|---|
| **Other Email Address** | Any other electronic mailing ID associated with a contact |
| **Other Related Contact** | A contact indirectly associated to an organization.<br>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.<br>***Examples:***<br>*1. Yum! Brands is the Parent Organization to KFC*<br>*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.<br>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.<br>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 speciic project. These permissions include performance, financial, and other project data. |
| **Project Summary/Abstract** | A narrative describing the purpose and/or need of the project. |

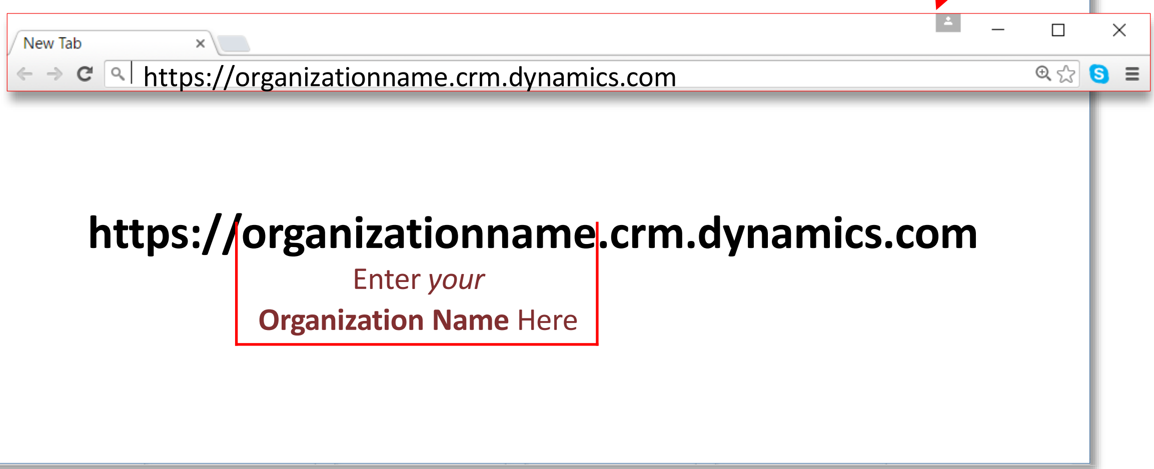
# GrantVantage Terms

| Term | Definition |
|---|---|
| **Related Organization** | An Organization indirectly associated with a contact.<br>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 |

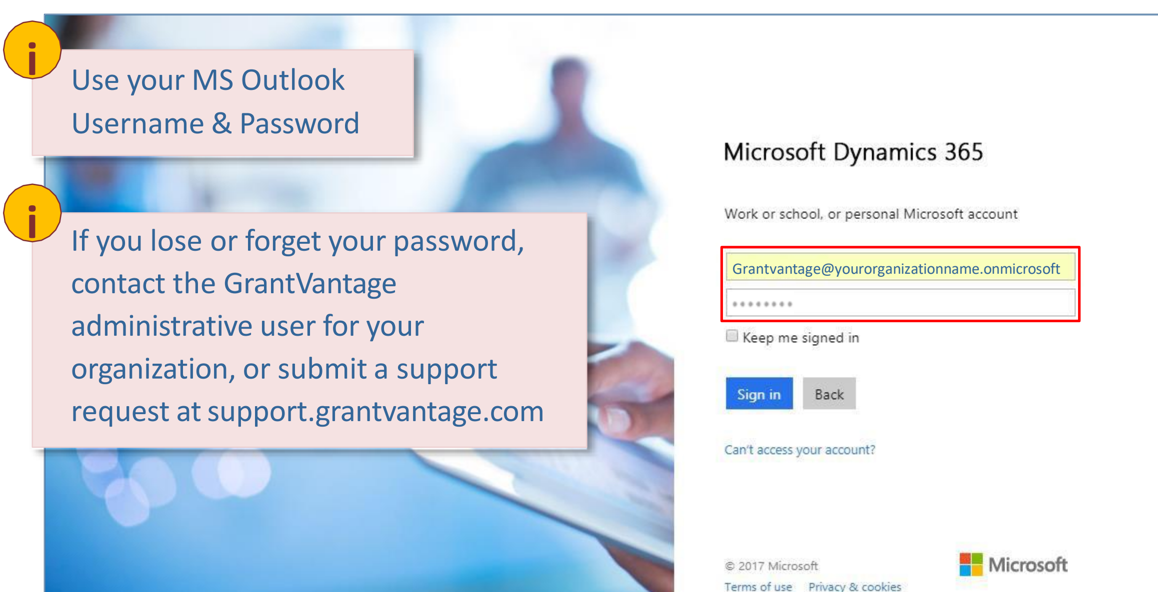
1. Open a preferred Web Browser (Microsoft Edge, Google Chrome, etc.)



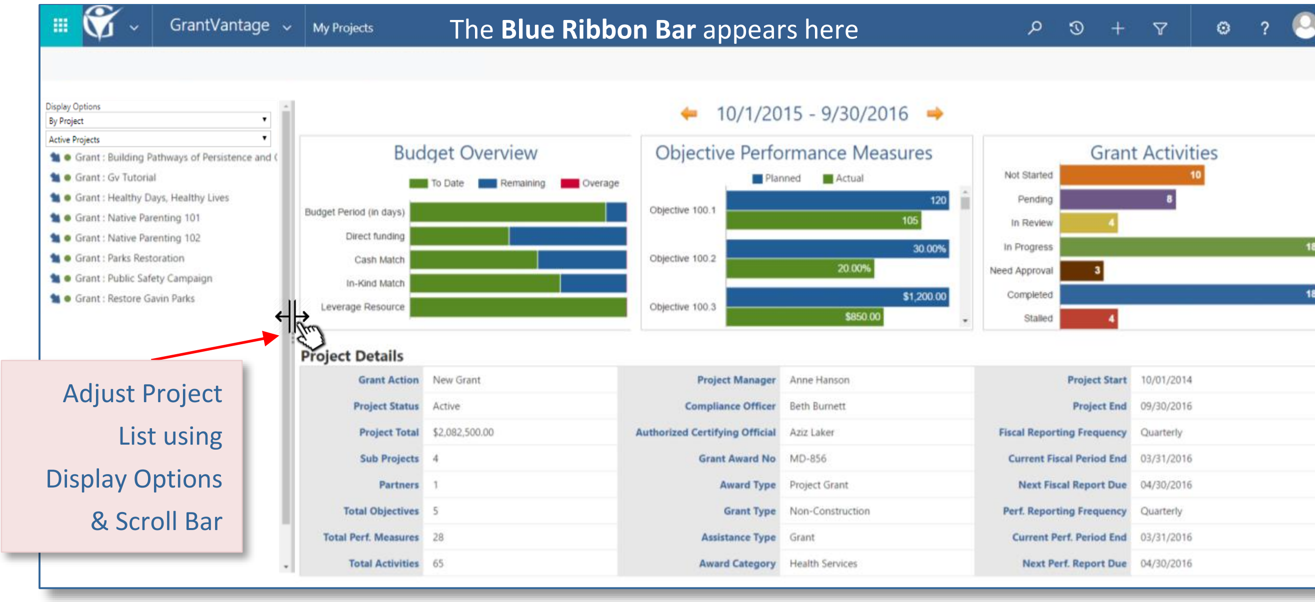

2. In the URL field of the web browser window, enter the web address provided by GrantVantage



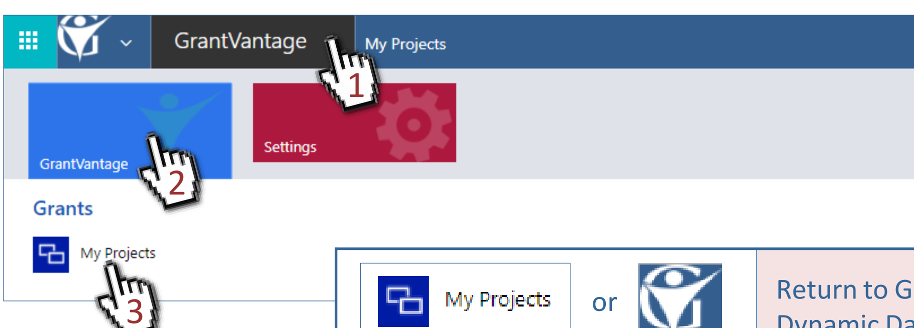

3. Enter the login credentials provided by GrantVantage, then select Sign in



This is the **GrantVantage Home Page**



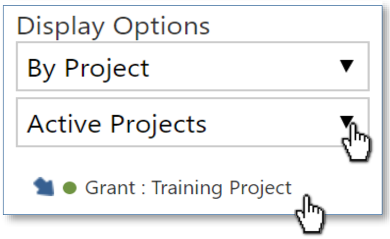

| | |
|---|---|
| GrantVantage ⌄ | GrantVantage Menu |
| My Projects | Projects assigned to user |
| | Search GrantVantage using keywords |
| | Recently Viewed items in GrantVantage |
| + | Quick Create: To easily create & assign project records & sub-activities |
| | Advanced Find: An in-depth search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




| | | |
|---|---|---|
| My Projects | or | Return to GrantVantage Home Page & Dynamic Dashboards |

## Project List

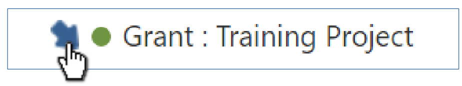
Use the Display Options picklist sort the display by Project, by Program or by Fund
Then sort projects by Active, Draft, Pending, Close-Out, Archived & All Projects




**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

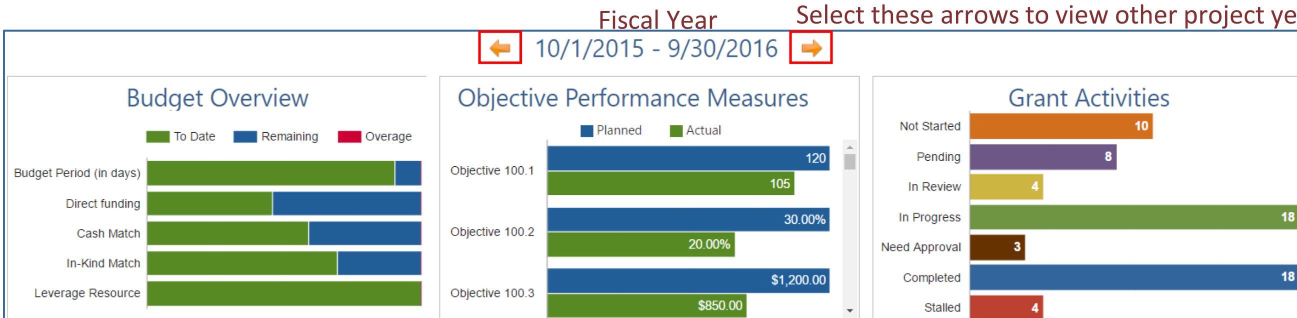
Select this arrow to expand project to view Sub-Projects




## The Dashboards & Project Details

Fiscal Year

Select these arrows to view other project years



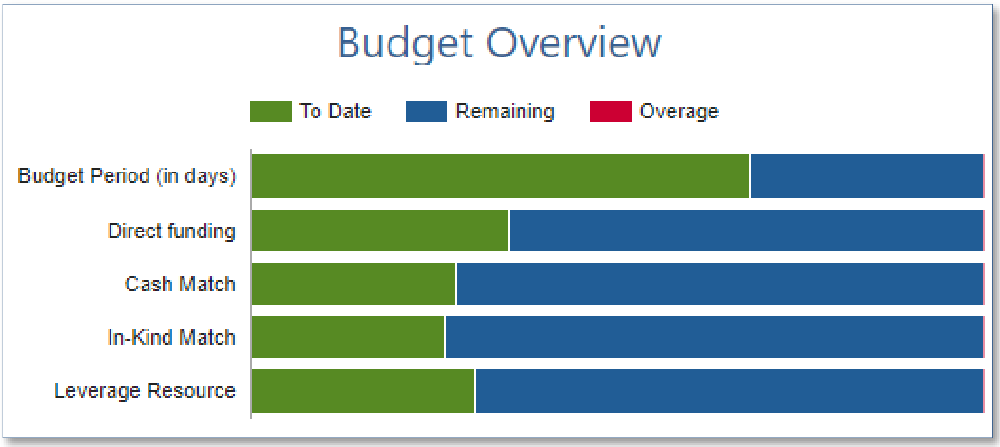

**Project Details**

| | | | | | |
|---|---|---|---|---|---|
| **Grant Action** | New Grant | **Project Manager** | Anne Hanson | **Project Start** | 10/01/2014 |
| **Project Status** | Active | **Compliance Officer** | Beth Burnett | **Project End** | 09/30/2016 |
| **Project Total** | $2,082,500.00 | **Authorized Certifying Official** | Aziz Laker | **Fiscal Reporting Frequency** | Quarterly |
| **Sub Projects** | 4 | **Grant Award No** | MD-856 | **Current Fiscal Period End** | 03/31/2016 |
| **Partners** | 1 | **Award Type** | Project Grant | **Next Fiscal Report Due** | 04/30/2016 |
| **Total Objectives** | 5 | **Grant Type** | Non-Construction | **Perf. Reporting Frequency** | Quarterly |
| **Total Perf. Measures** | 28 | **Assistance Type** | Grant | **Current Perf. Period End** | 03/31/2016 |
| **Total Activities** | 65 | **Award Category** | Health Services | **Next Perf. Report Due** | 04/30/2016 |

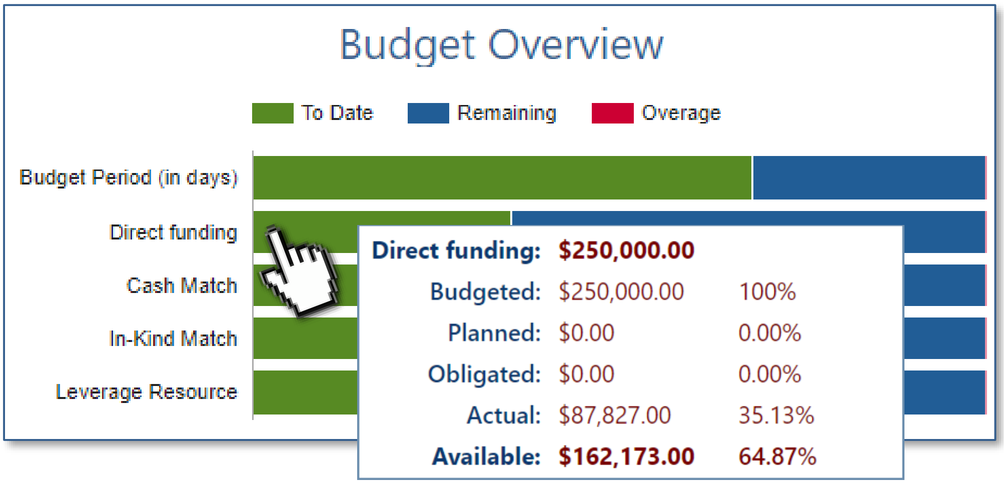
| | |
|---|---|
| **Budget Overview** | Real-time overview of current Grant Budget progress *(hover over to see details)* |
| **Object Performance Measures** | Real-time overview of the progress of Performance Measures & Objectives *(hover over to see details, single-click to update)* |
| **Grant Activities** | 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

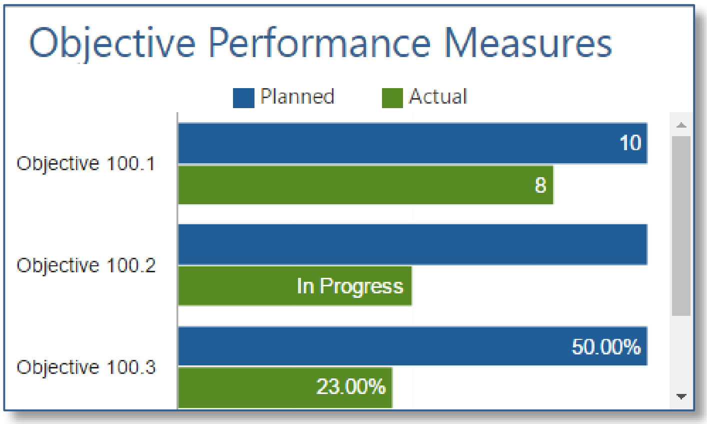



To view details, hover your mouse cursor over the row you wish to view



## 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

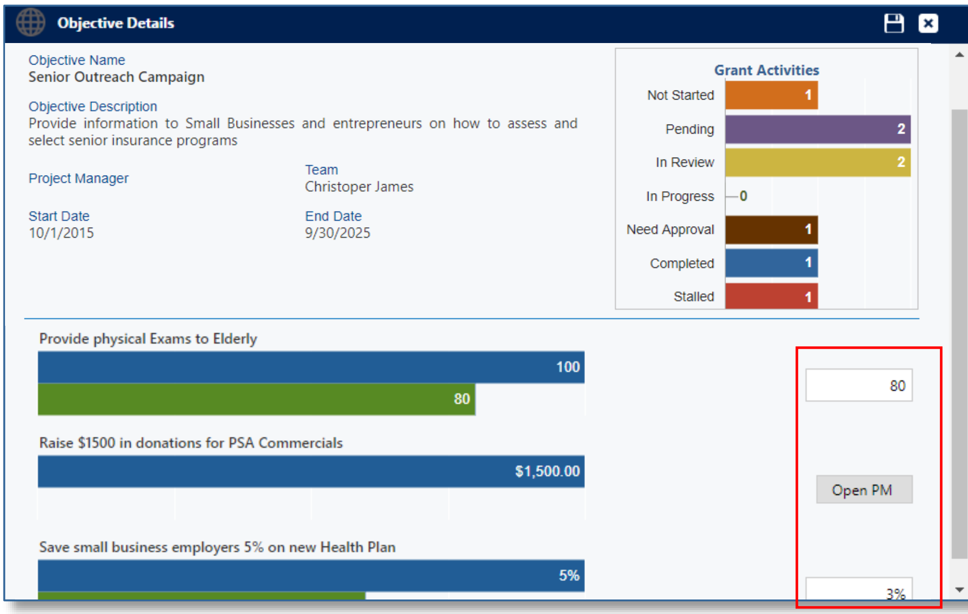
***Blue*** represents Planned Performance Measures

***Green*** represents actual Performance Measure progress

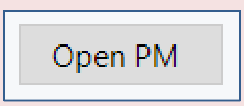

To update grant progress from the Objective Performance Measures Dashboard, single-click the Performance Measure you wish to update

## The Objective Performance Measures Dashboard

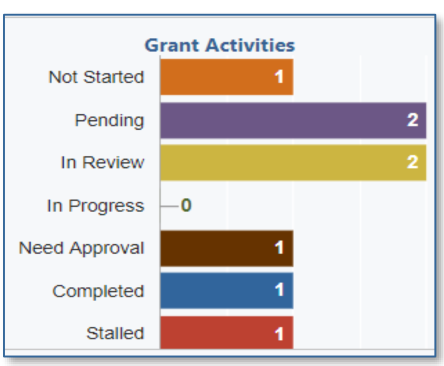
### This is the **Objective Details Window**




Update Actual Amounts in these fields



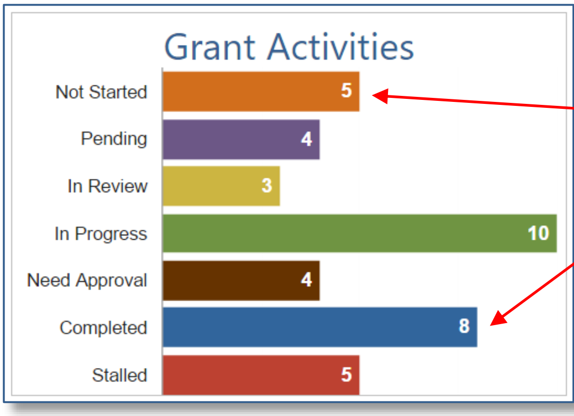

Select to open Performance Measure Details in a new window




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

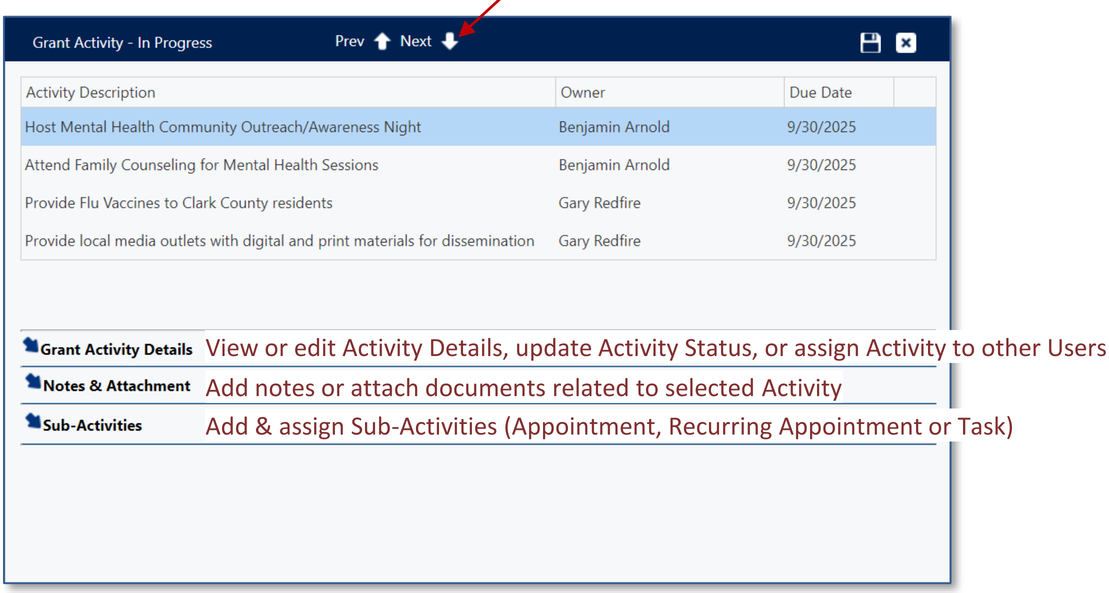



These numbers indicate how many Grant Activities exist at each stage of completion

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

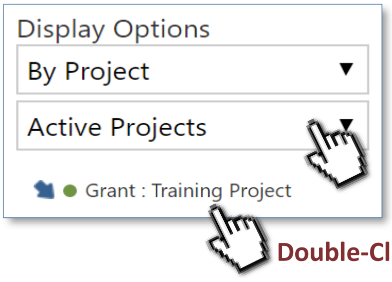
This is the **Activity Details Window**

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



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

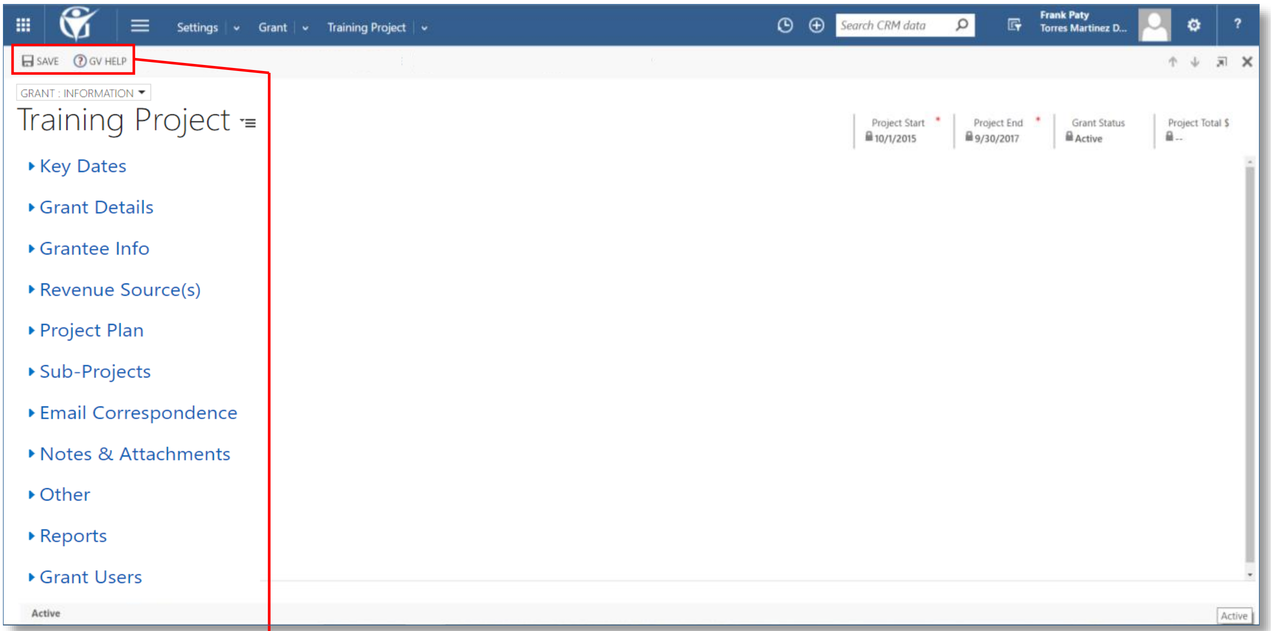
To open a specific active project, double-click the Project Name in the Project List
This will open the **Project Form** of the selected Project




**Double-Click to Open**

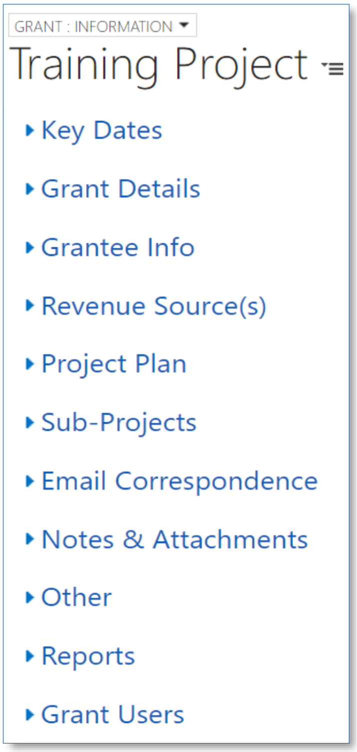
## The Project Form

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**

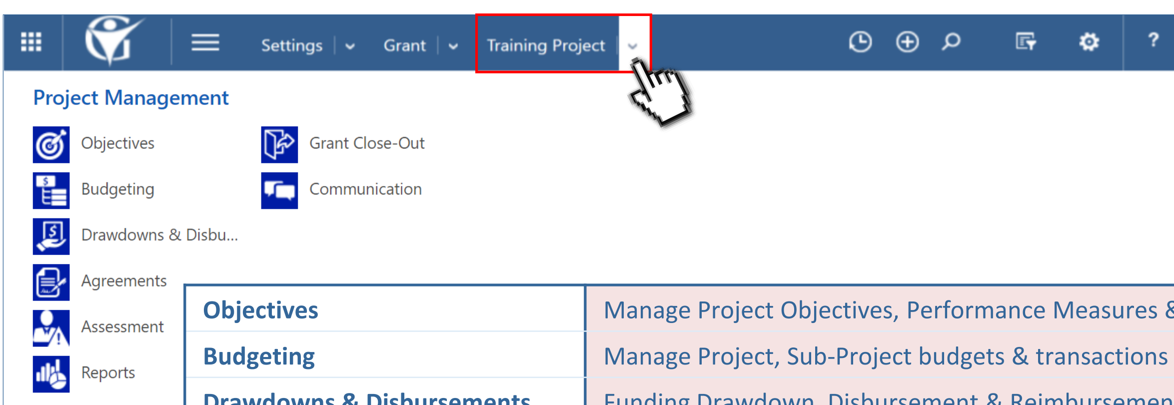

| | |
|---|---|
| **Save** | Save any changes made within the Project Form |
| **GV Help** | Access the GrantVantage Online Helpdesk |




| | |
|---|---|
| **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

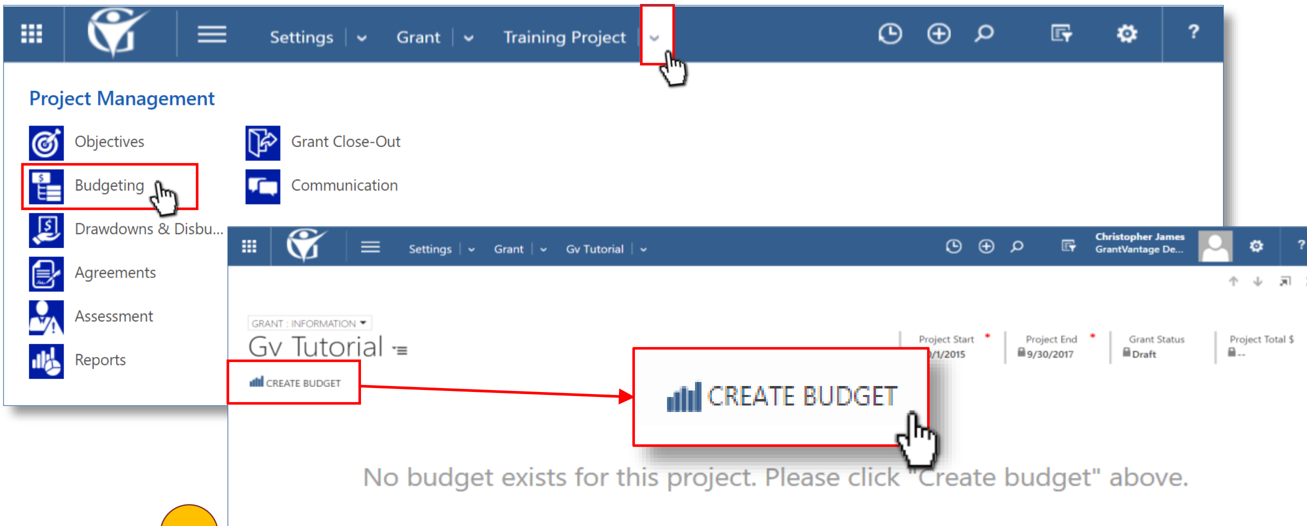
Located on the Blue Ribbon Bar of an open project, it allows users to access & manage the other pages of the project




| | |
|---|---|
| **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

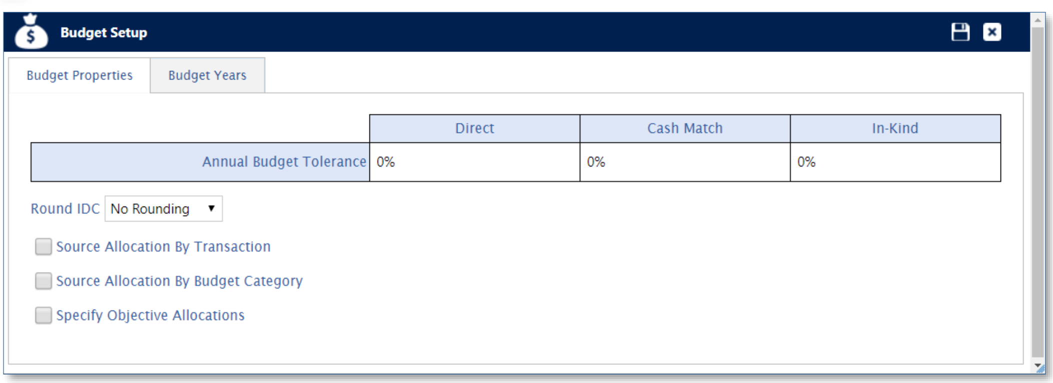
- Open the Project for which you will be creating a budget
- In the Project Menu on the Blue Ribbon Bar, select **Budgeting**
- Under the Project Title, select **Create Budget**




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

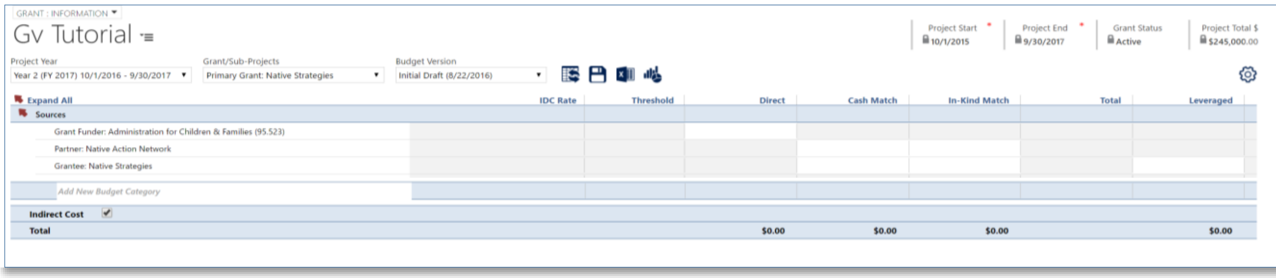
2

## Budget Properties

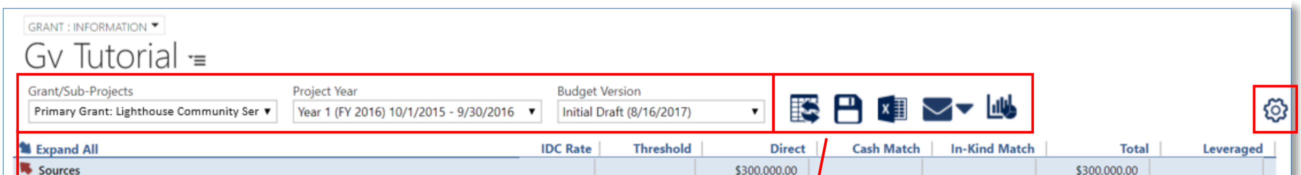


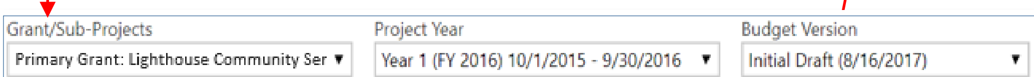

| | |
|---|---|
| **Annual Budget Tolerance** | The reallocation of funds between expenses allowed before a revision draft must be created |
| **Rounding** of the **IDC** | (Indirect Cost Rate) Determines how the IDC will calculate and display. IDC values can round to the nearest whole number, the nearest 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 [save icon]
The project budget will display as an **Initial Draft**.
Budget categories and budget values may now be entered



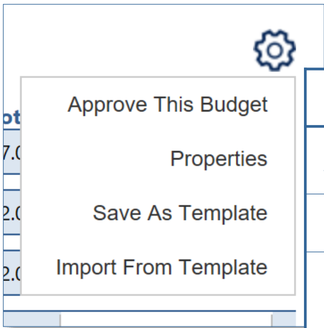

4 The **Budget Menu**, located above the budget, enables user to sort budgets by project year & version, refresh the budget, save the budget, export the budget, and view budget graphs



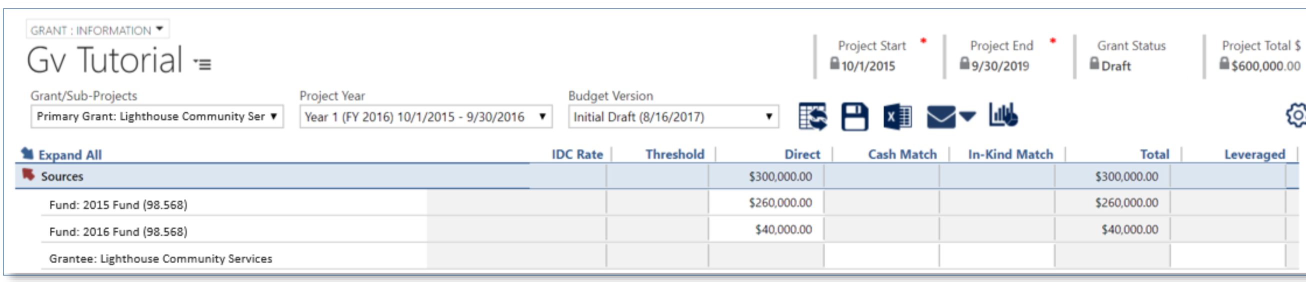

| Grant/Sub-Projects | Project Year | Budget Version |
|---|---|---|
| Navigate between Grant & Sub-Project Budgets | Navigate between Grant Budget Years | Navigate between Budget Draft Versions: Initial Draft, Revision Draft, and Approved |

| | | |
|---|---|---|
| | **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 *Budgeted* vs. *Actual* graphs & charts |
| | **Budget Settings** | To view/change budget settings |



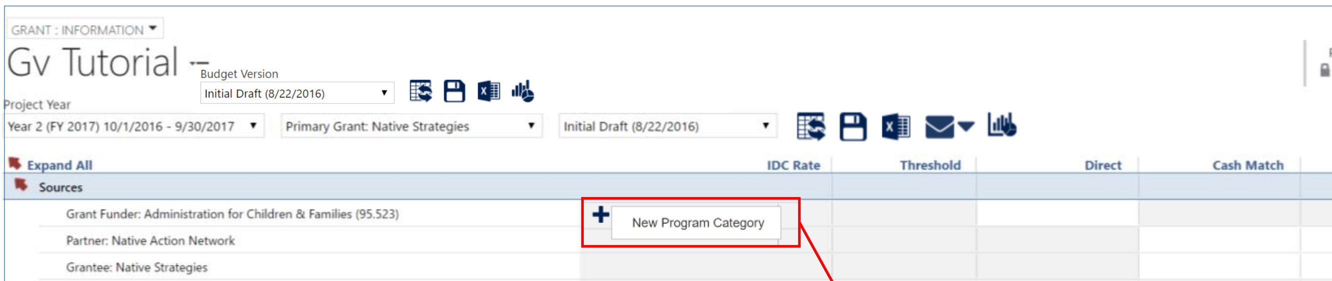

| Draft Budget Settings | |
|---|---|
| **Approve This Budget** | Change from Draft to Approved Budget *(Administrative Users only)* |
| **Properties** | View Budget Properties |
| **Save as Template** | Save current budget as a template, to be used in other project budgets |
| **Import From Template** | Import existing Template Budget |

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

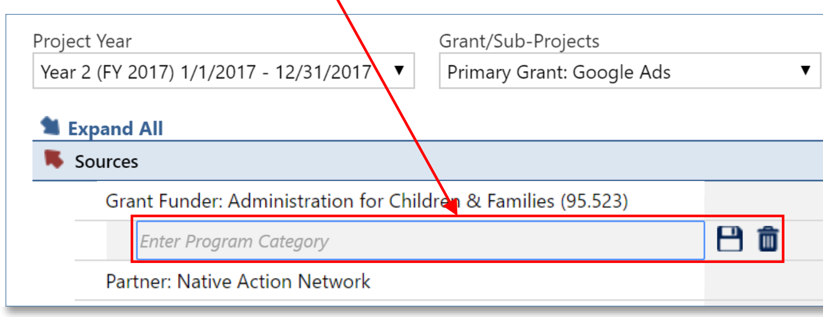


**Program Categories:** Enables users to segment ***Source*** funds into secondary categories (Administration, Implementation, etc) prior to allocating expenses

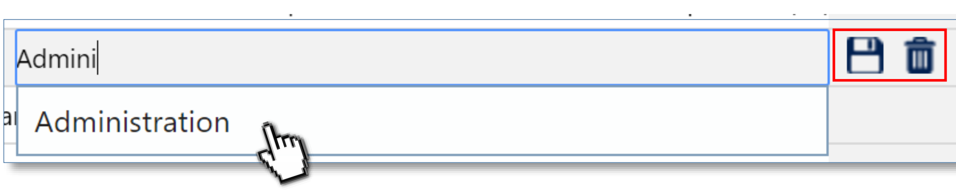
1. The first step to entering a budget is to enter **Program Categories**.
   Hover the cursor over the source to which a Program Category will be added,
   Select **+** then select **New Program Category**




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

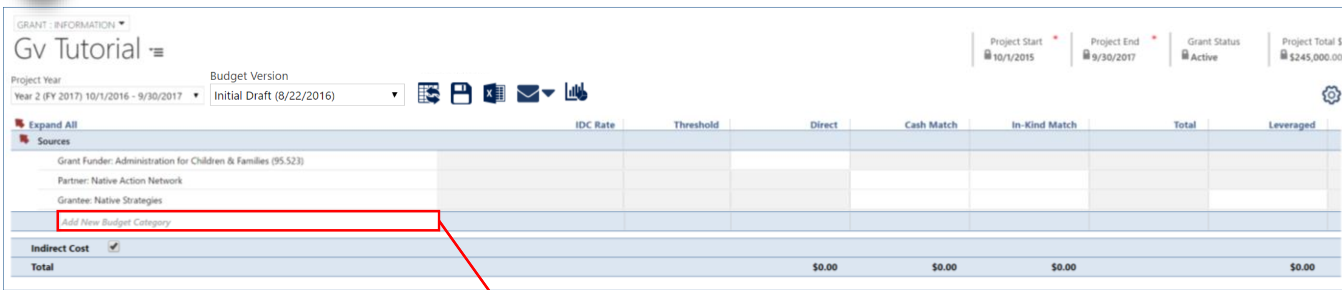



3. While Typing the Category Name, the field will display a list of suggested categories already existing in the database. If the desired category already exists in GrantVantage, select it from the list.
   If the Program Category is does not exist in the system, select the Save icon to the right of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

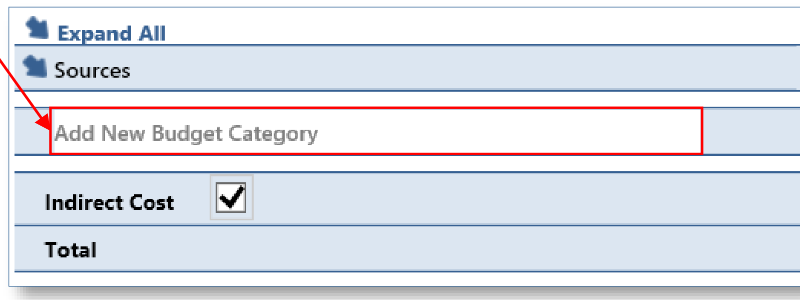


## Enter a Draft Budget: Budget Categories

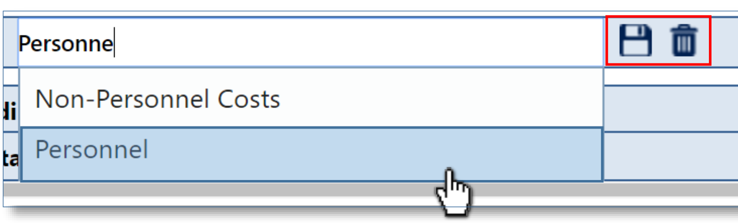
1. The first step to entering a budget is to enter **Budget Categories**




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

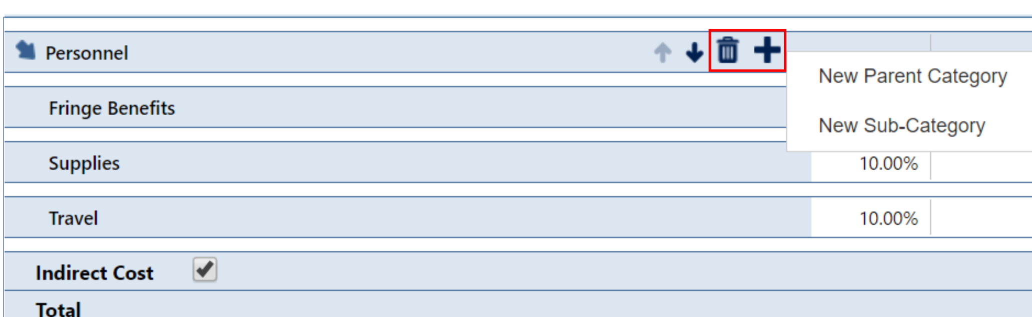



3. While typing the Category name, the field will display a list of suggested categories already existing in the database. If the desired category already exists in GrantVantage, select it from the list. To create a *new* Category, type it in the **Add New Budget Category** field and select save.

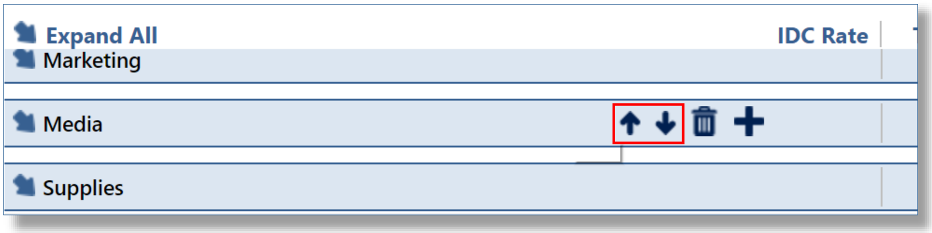



4. To add additional Parent or Sub-Categories, select the + symbol on the newly-created Parent Category then select the desired category type.

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

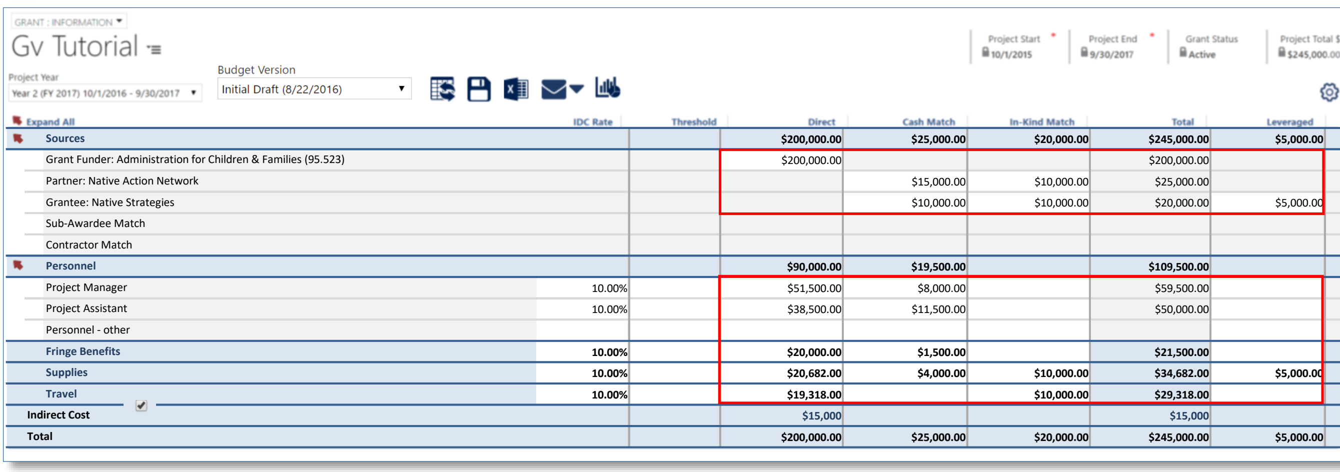


5 To adjust the order of selected budget categories, select the blue arrows on the Category line



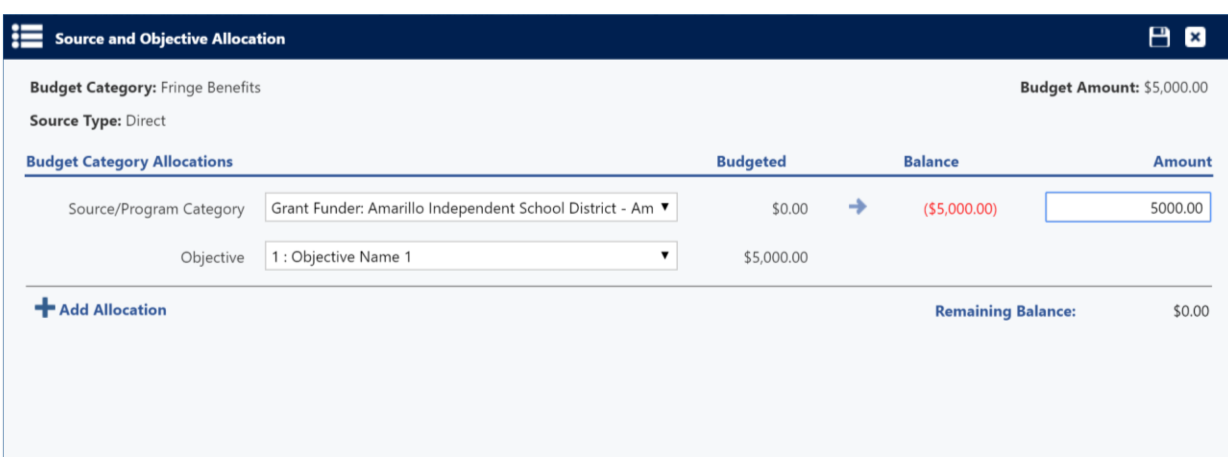

## Enter a Budget: Budget Values

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.

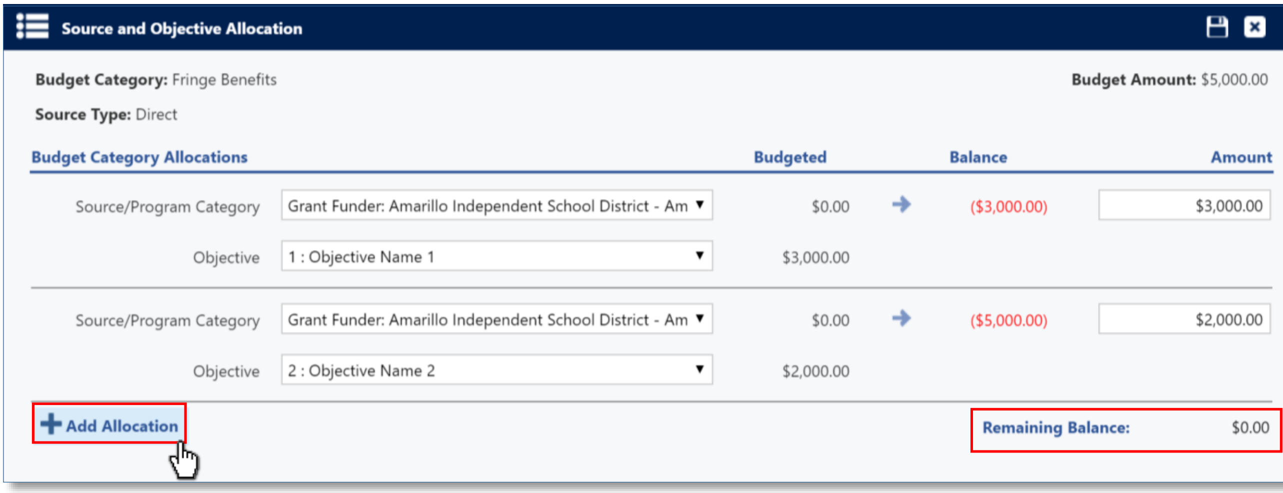



| Expand All | IDC Rate | Threshold | Direct | Cash Match | In-Kind Match | Total | Leveraged |
|---|---|---|---|---|---|---|---|
| Sources | | | $200,000.00 | $25,000.00 | $20,000.00 | $245,000.00 | $5,000.00 |
| Grant Funder: Administration for Children & Families (95.523) | | | $200,000.00 | | | $200,000.00 | |
| 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 | | | $15,000 | |
| 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



**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**

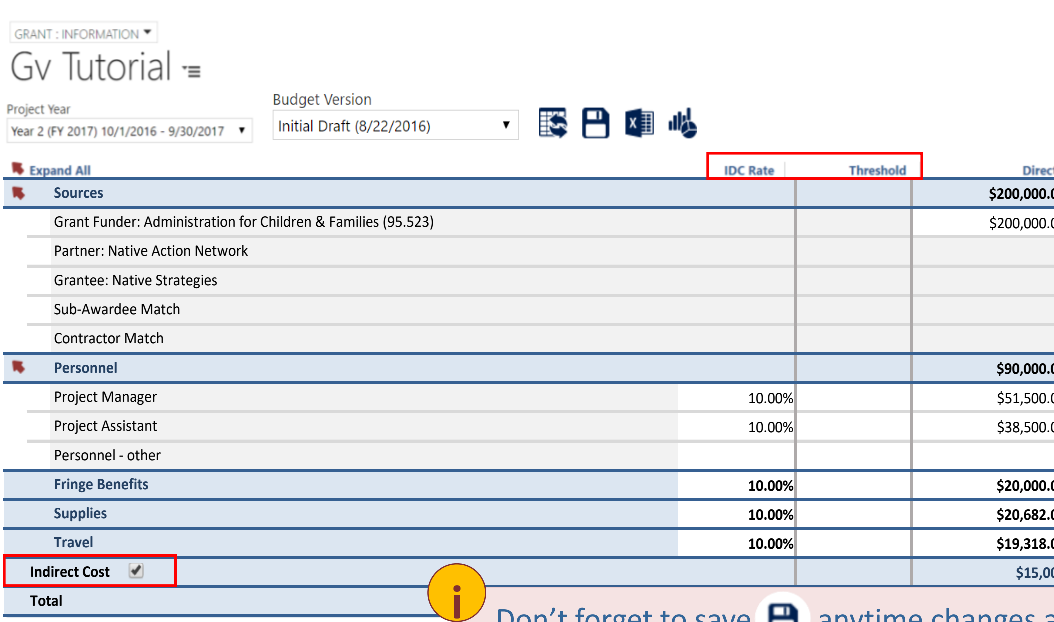



**4** The **IDC Rate** values entered for each budget category will calculate at the bottom of the budget when the checkbox is marked.

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

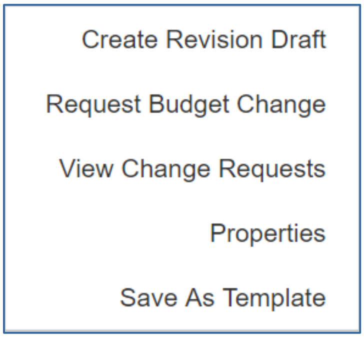
When transactions are entered, GrantVantage calculates the IDC rate based on the predetermined IDC percentage for each category. This is reflected in the Transaction Detail Report.

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




Don't forget to save anytime changes are made!

## Approved Budget Settings



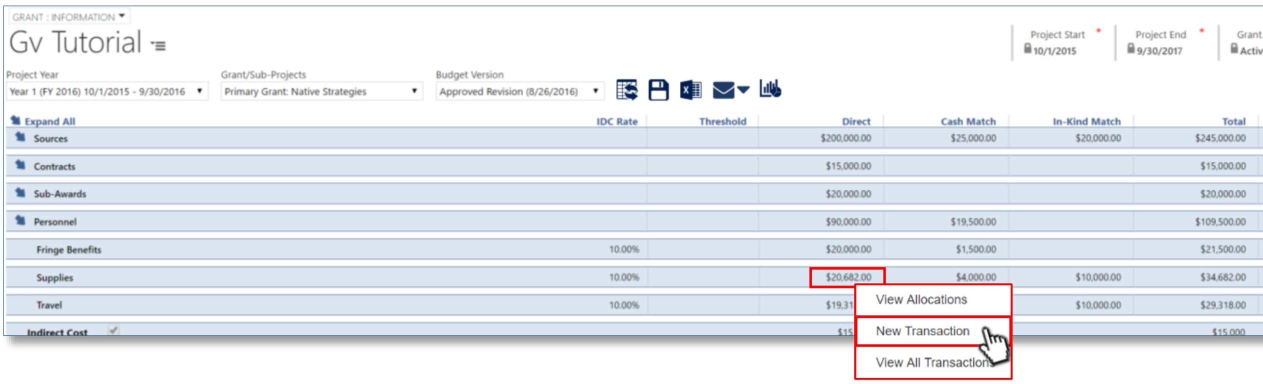

| | |
|---|---|
| **Create Revision Draft** | Generates editable Revision Draft of Budget |
| **Request Budget Change** | Request changes to an approved budget |
| **View Change Requests** | View submitted Budget Change Requests |
| **Properties** | View/edit Budget Properties |
| **Save as Template** | 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

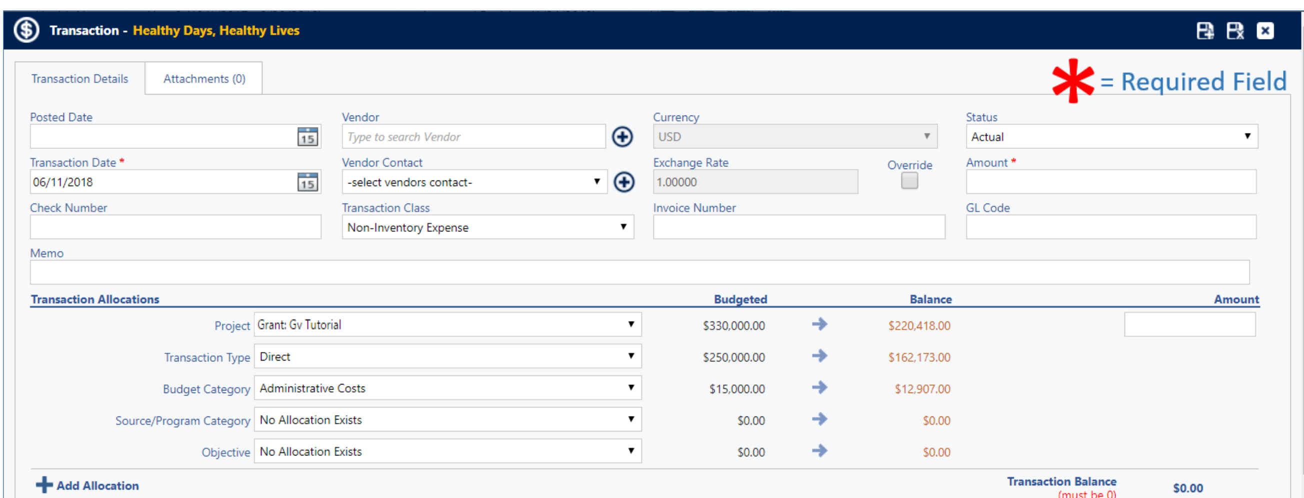
## Add Transactions within Budgeting Page

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**




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



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


**4**

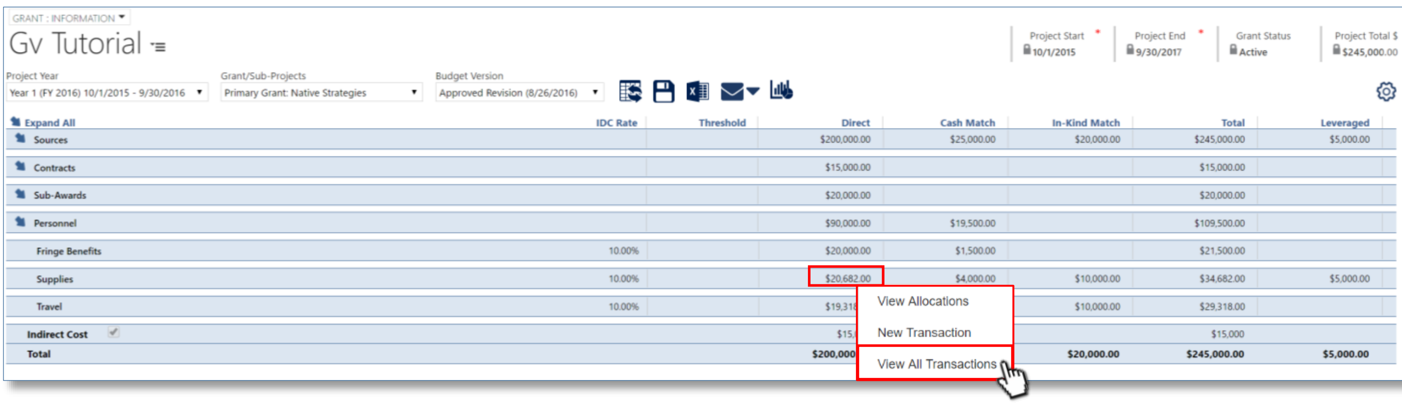
- Select the **Attachments** tab to upload supplemental documentation with the transaction record
- Select **+Add Attachment** and follow on-screen prompts


**Save & + New** **Save & Close** **Close**

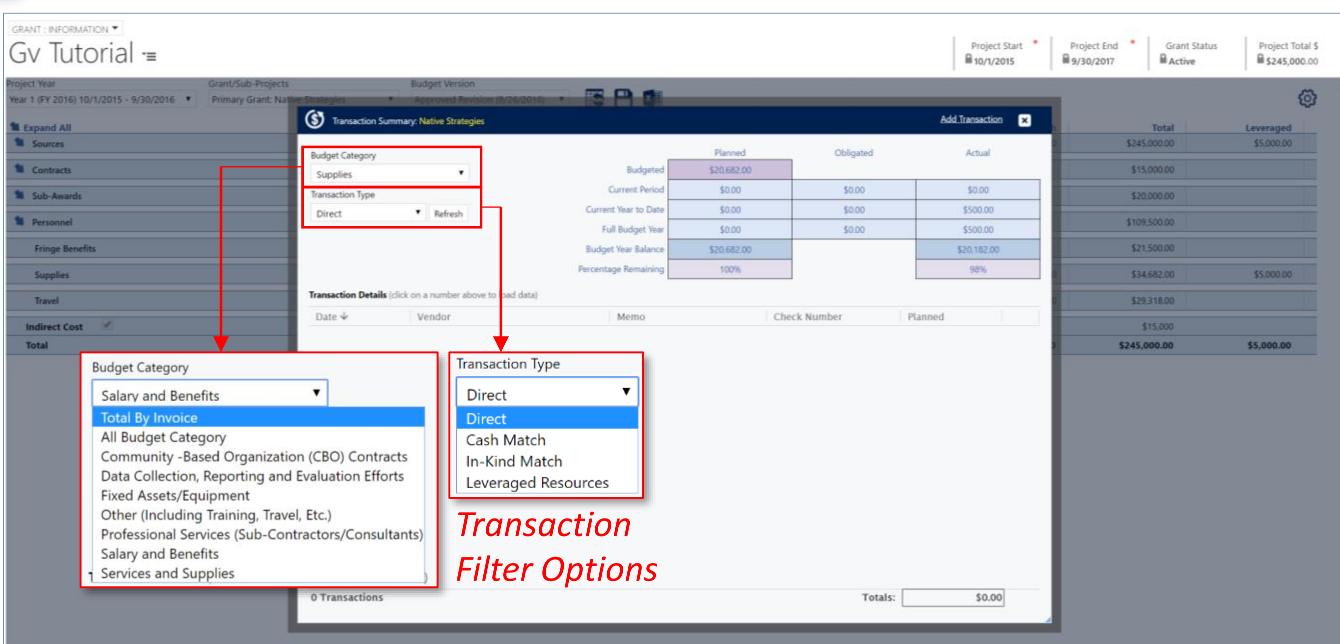
## View All Transactions from within Budgeting Page

**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

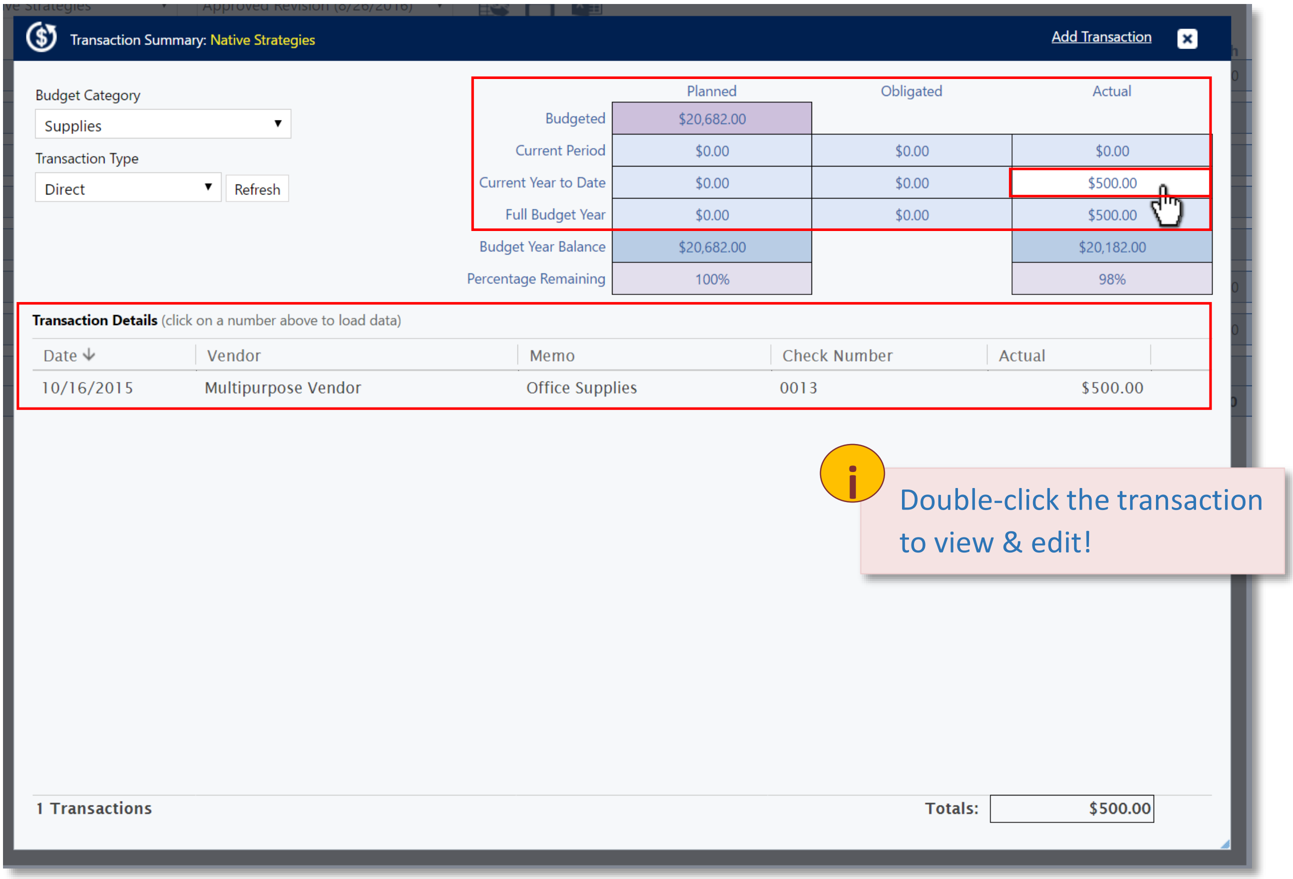
Select **View All Transactions**



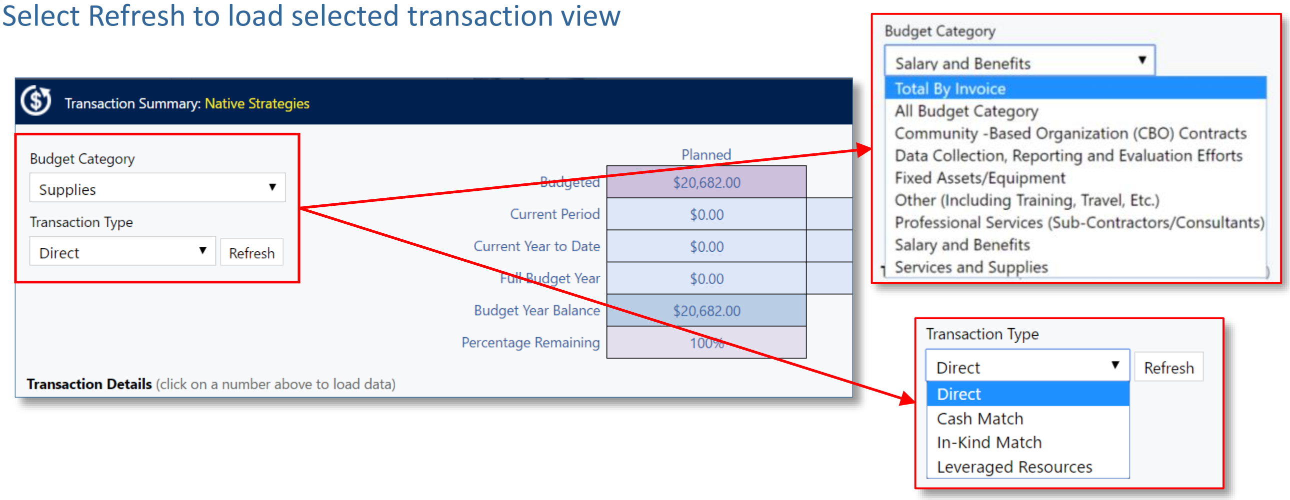

**2** The **Transaction Summary** form will appear



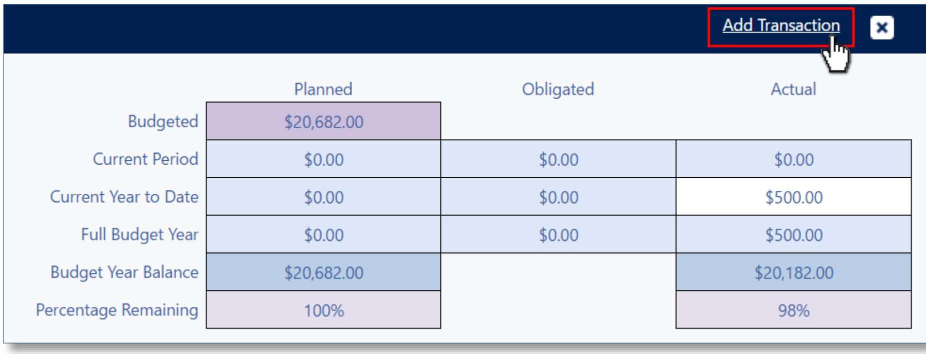
3 Select the transaction status and time period you wish to view in order to see transaction information appear in the **Transaction Details** section




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



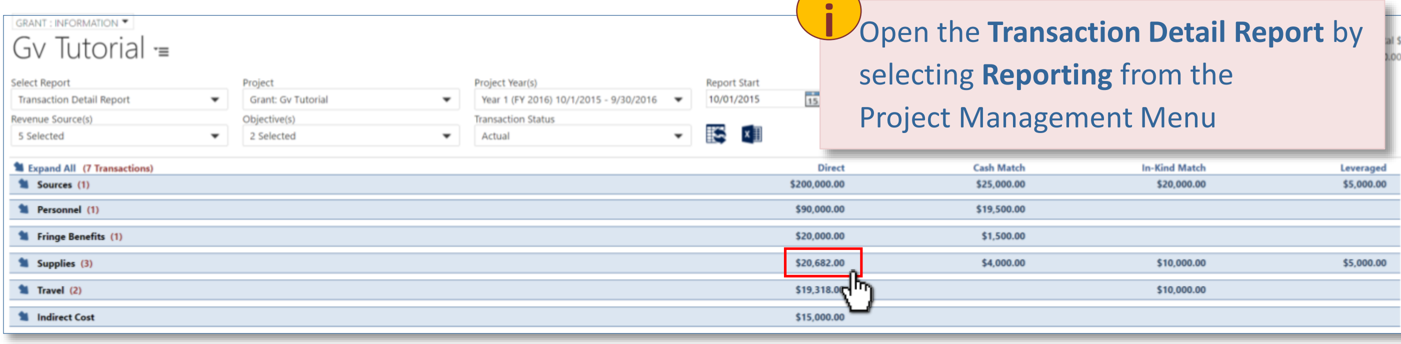
**5** Users may also add a transaction from the **Transaction Summary** form by selecting **Add Transaction** in the top right corner of the form



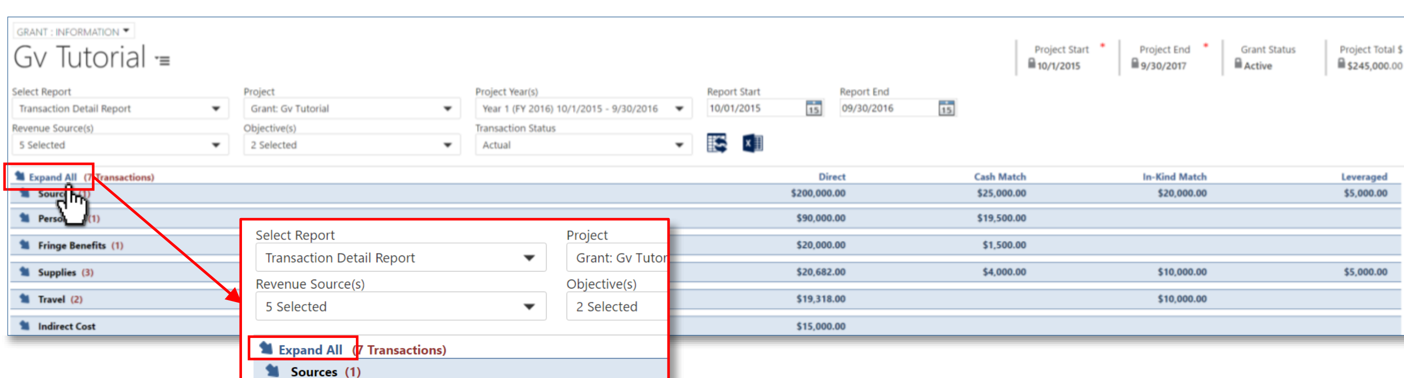

## Add & View Transactions from within Transaction Detail Report

**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

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



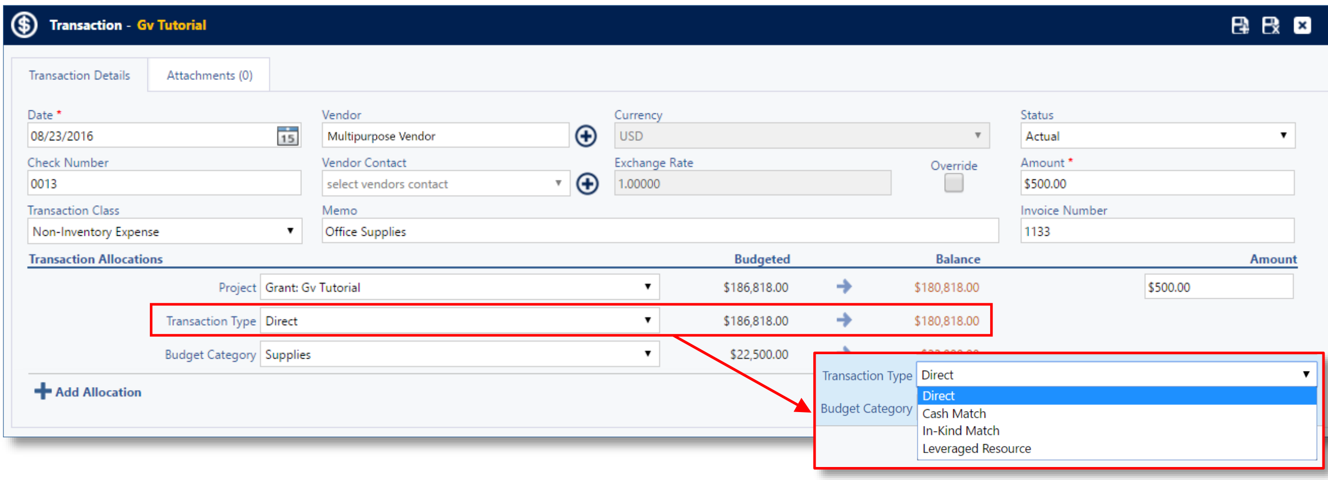

**2** To view *all* entered transactions for the selected Budget, select **Expand All** at the top left corner of the report



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

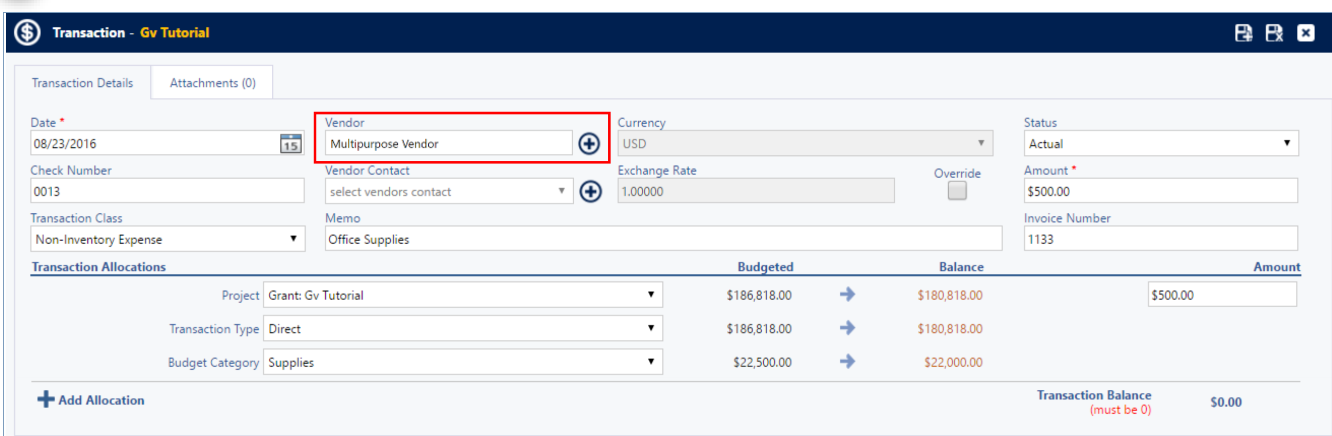
The Transaction form is a versatile aspect of the GrantVantage budgeting system.
In the Transaction Form, users can add Direct, Cash match, In-kind, Leveraged and Inventory transactions

**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



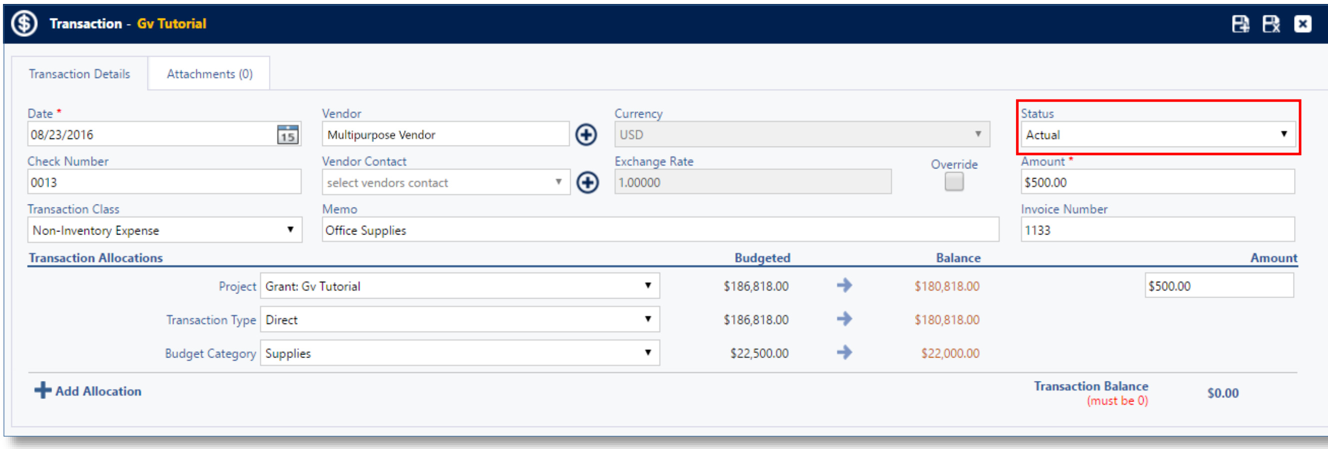

For **Non-Inventory Direct** and **Cash Match** transactions, enter **Transaction Details** as needed

**2** Search & select the Vendor Organization

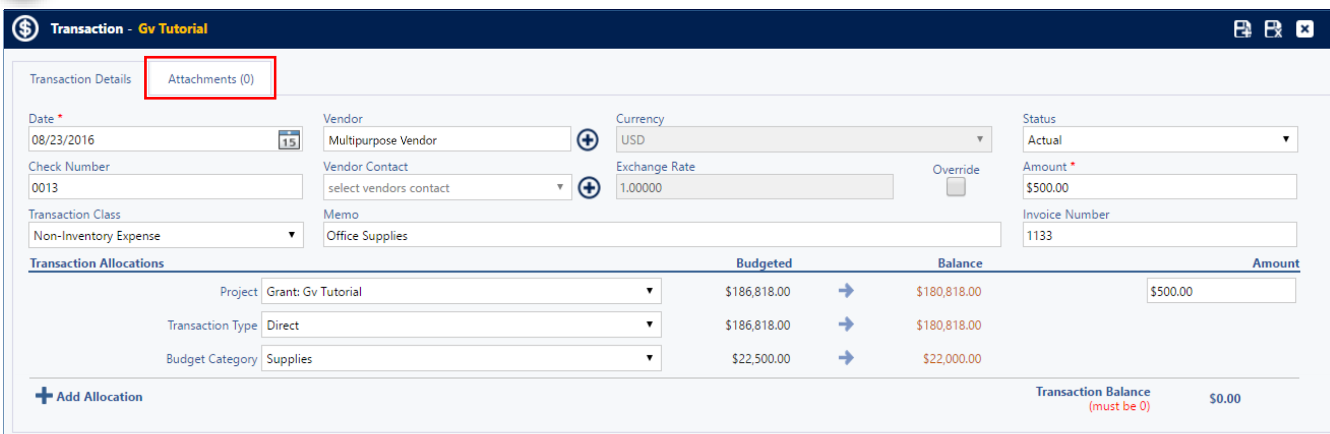


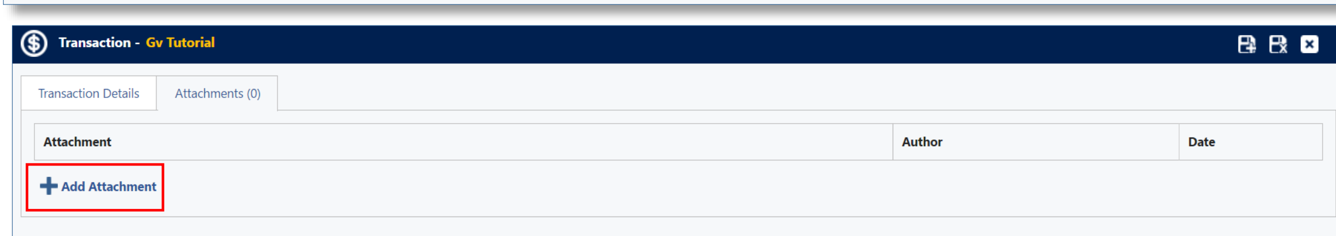

**Save & + New** **Save & Close** **Close**

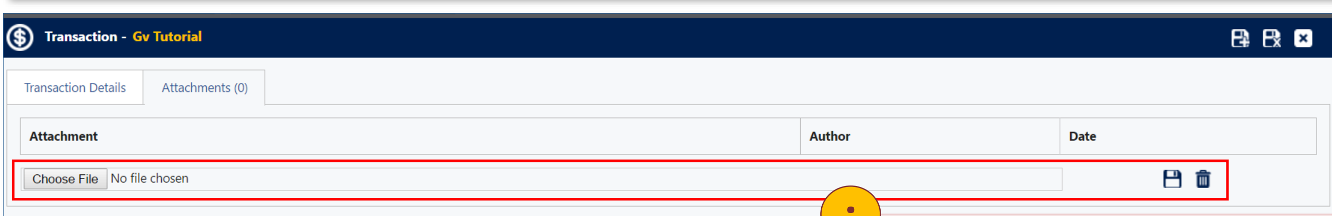
**3** Set the transaction status to **Actual**, **Obligated** or **Planned**
This will determine where the transactions appear in the **View All Transactions** form and the **Transaction Detail Report**




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

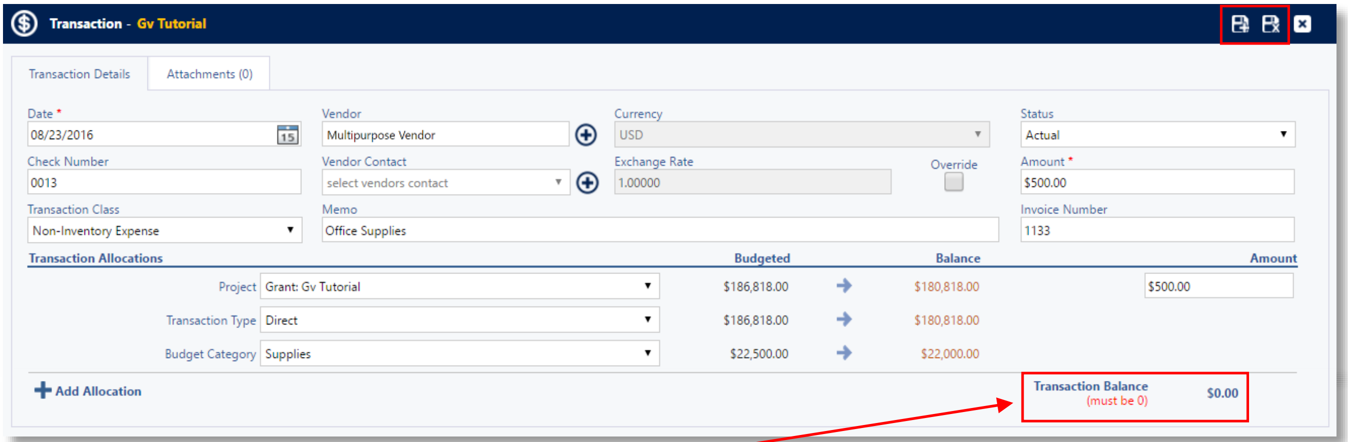



Don't forget to save Attachments!

**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



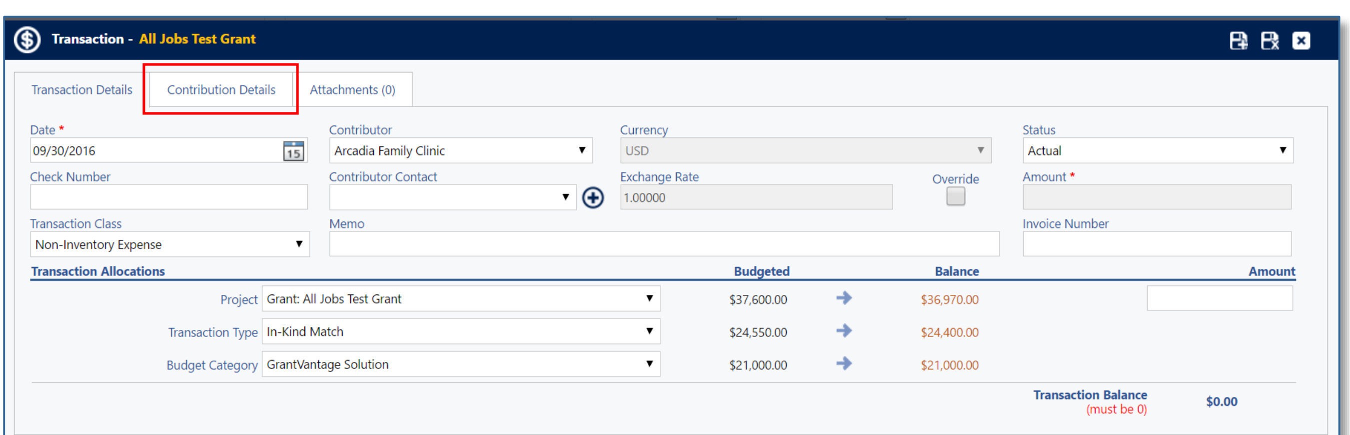

Ensure the **Transaction Balance equals $0.00**
This means the Transaction Balance and the Allocation Amount match, otherwise the transaction cannot be saved

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

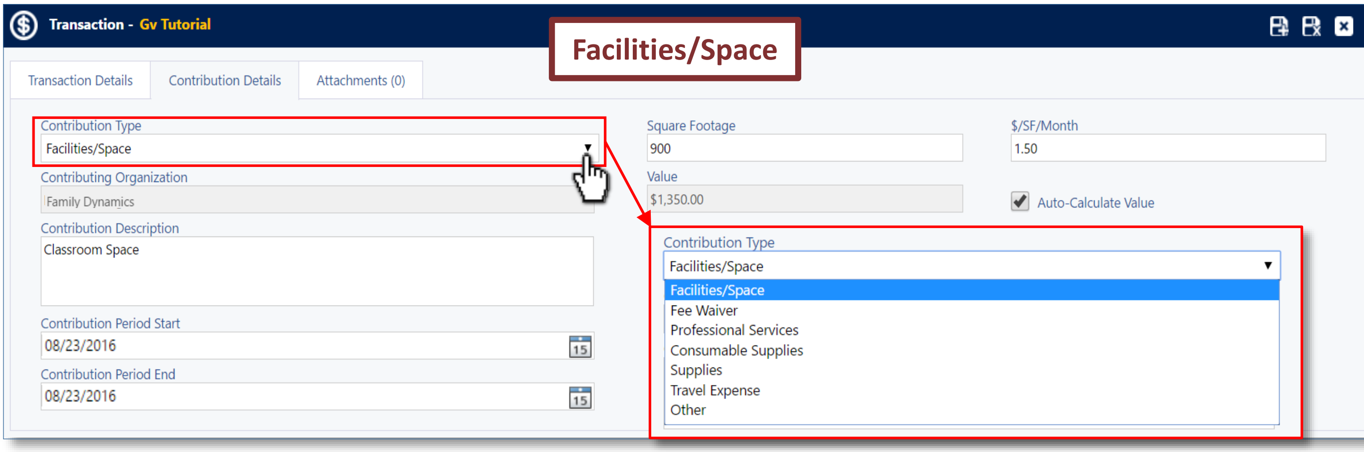
In-Kind and Leveraged resources transaction types will prompt a new tab called **Contribution Details**
With these types of transactions, Actual transaction values are calculated based on information entered in the **Contribution Details** tab

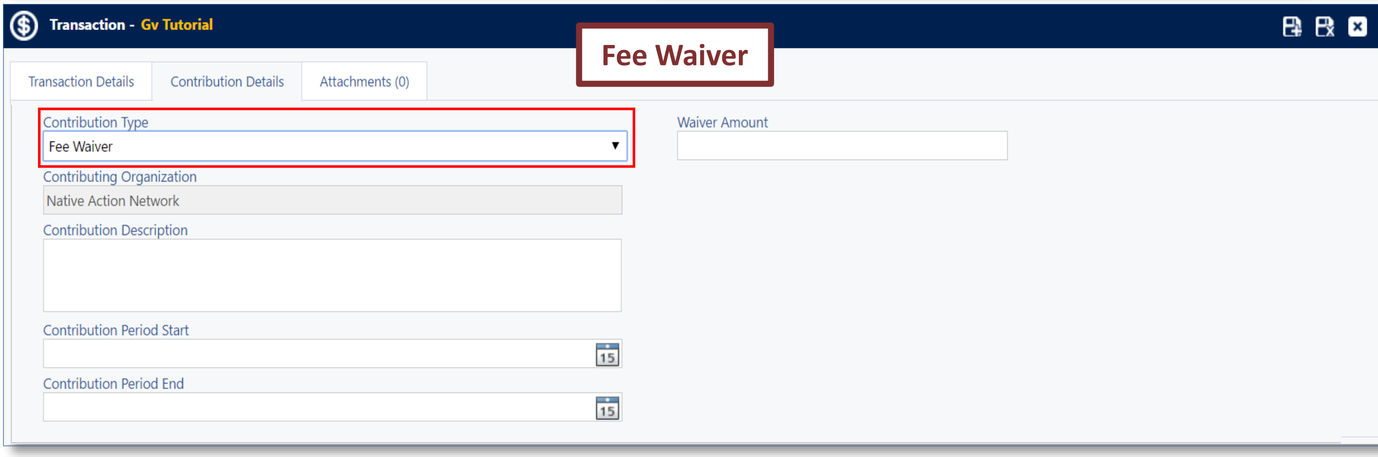
**1** Set the **Transaction Type** to **In-Kind** or **Leveraged Resources,** then select the **Contribution Details** tab

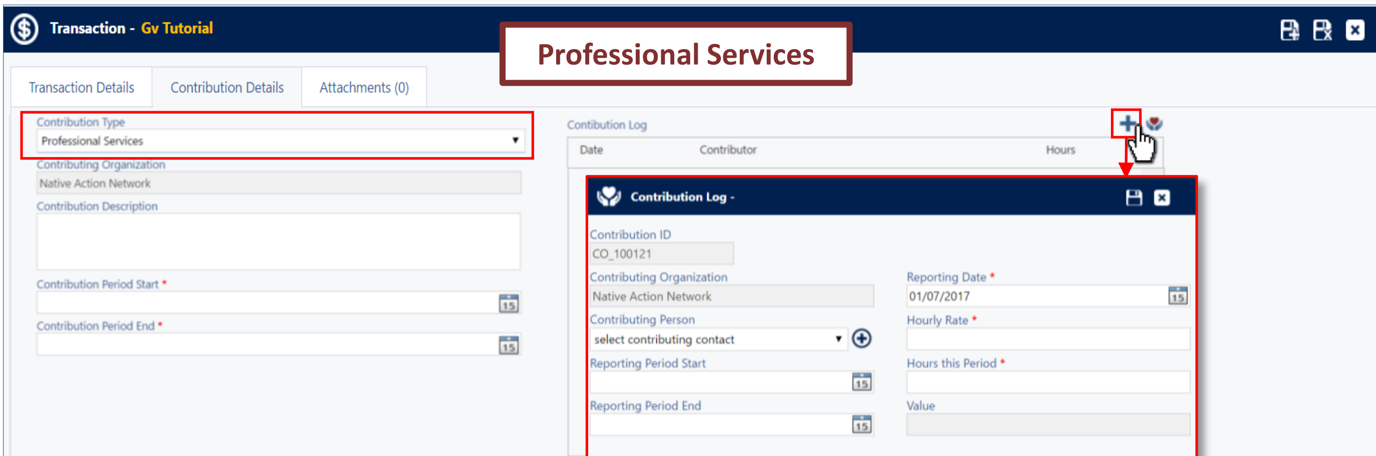


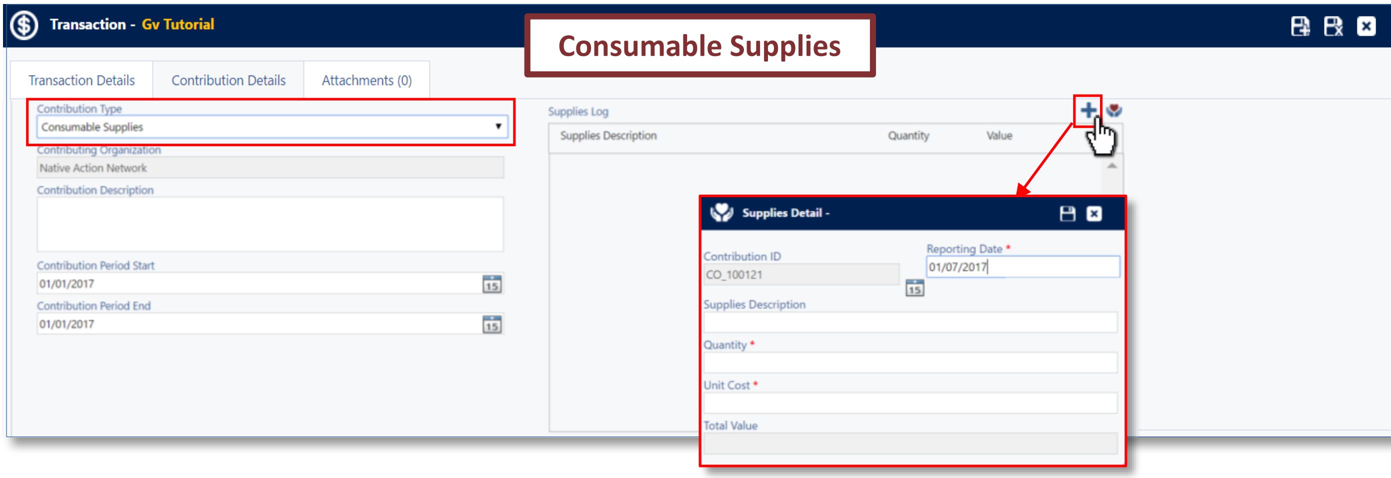
**2** **Contribution Details** gives users the ability to enter a variety of contribution types such as Facilities/Space, Fee Waiver, Professional Services, Consumable Supplies, Supplies, Travel Expense, or Other.

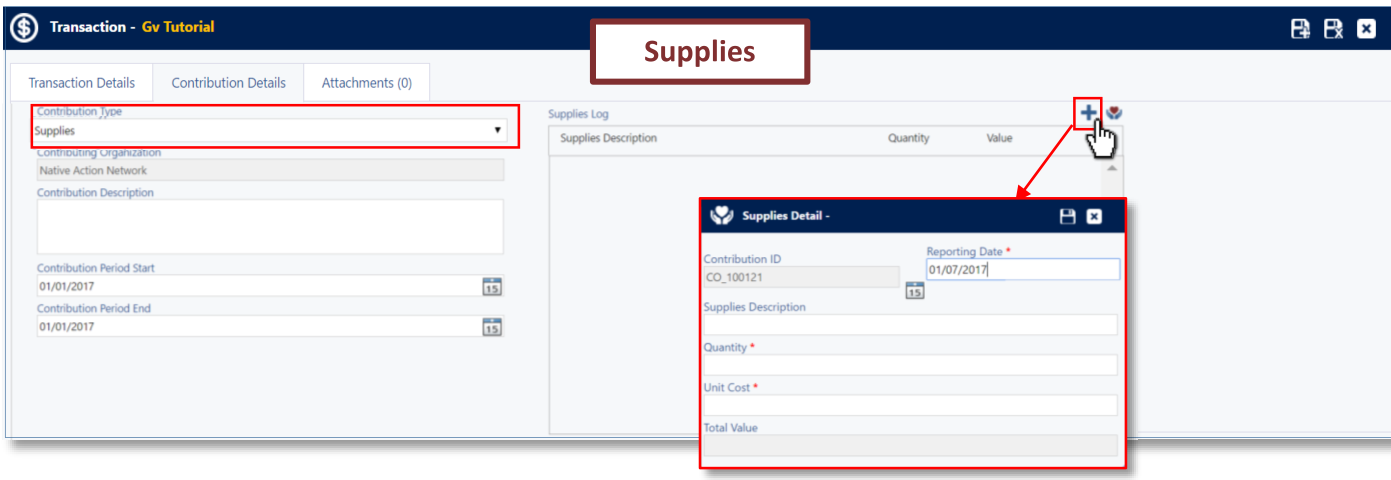
Select the **Contribution Type** of the transaction. Once selected, the form will change depending on the selection – **Each image below displays the different options for Contribution Types!**

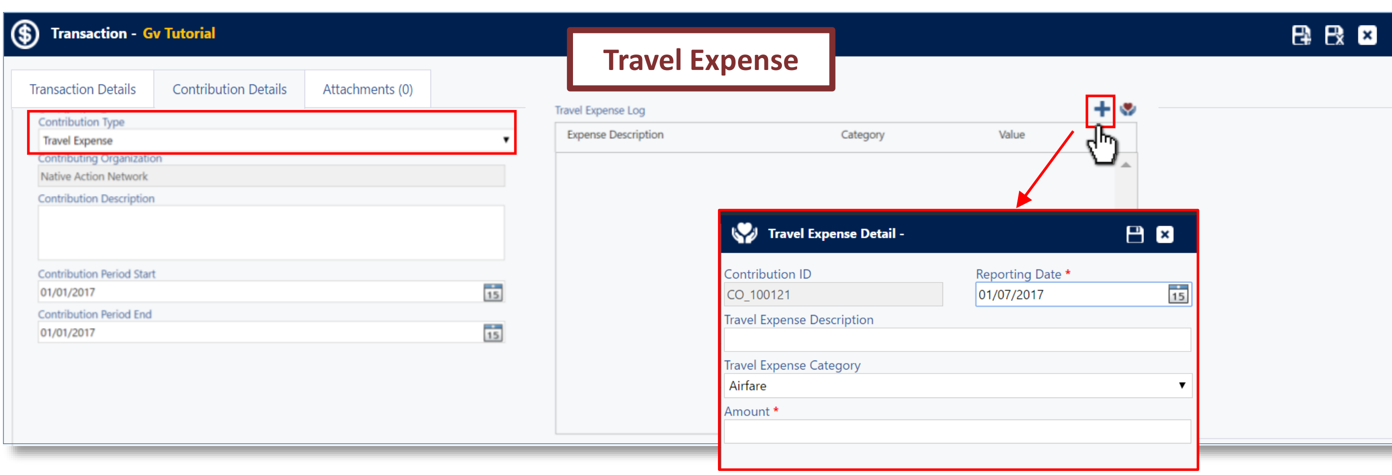


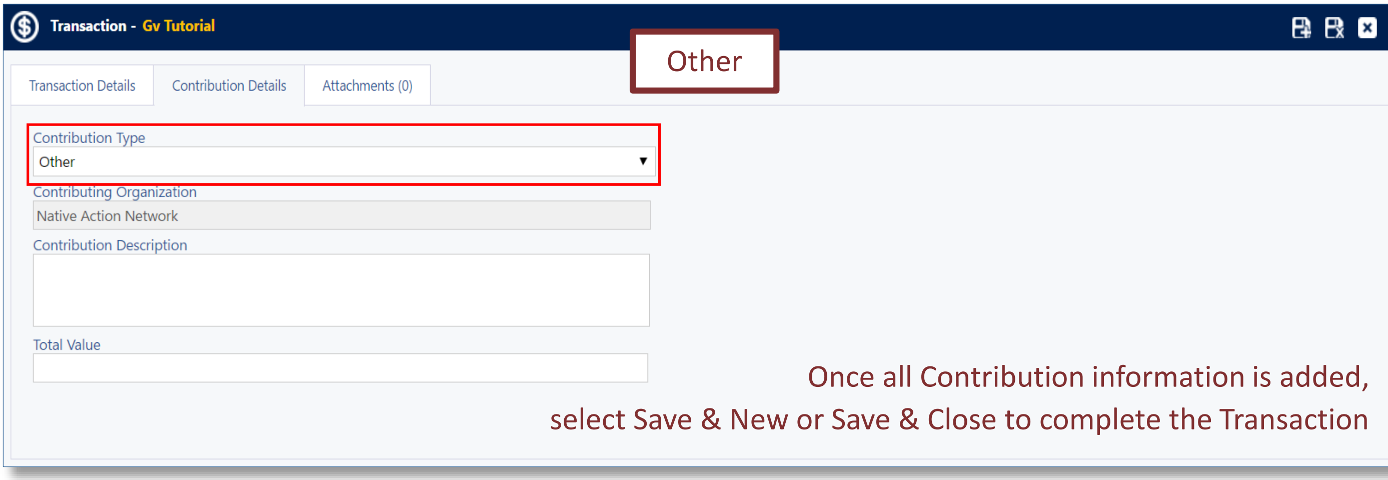




Transaction - Gv Tutorial
Consumable Supplies
Transaction Details
Contribution Details
Attachments (0)
Contribution Type
Consumable Supplies
Contributing Organization
Native Action Network
Contribution Description
Contribution Period Start
01/01/2017
Contribution Period End
01/01/2017
Supplies Log
Supplies Description
Quantity
Value
Supplies Detail -
Contribution ID
CO_100121
Reporting Date *
01/07/2017
Supplies Description
Quantity *
Unit Cost *
Total Value


Transaction - Gv Tutorial
Supplies
Transaction Details
Contribution Details
Attachments (0)
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

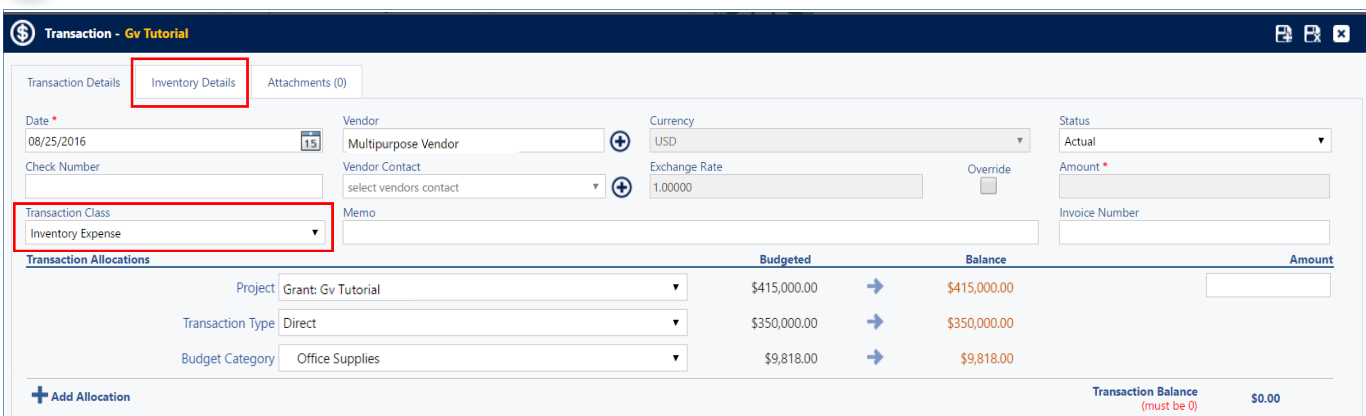

Transaction - Gv Tutorial
Travel Expense
Transaction Details
Contribution Details
Attachments (0)
Contribution Type
Travel Expense
Contributing Organization
Native Action Network
Contribution Description
Contribution Period Start
01/01/2017
Contribution Period End
01/01/2017
Travel Expense Log
Expense Description
Category
Value
Travel Expense Detail -
Contribution ID
CO_100121
Reporting Date *
01/07/2017
Travel Expense Description
Travel Expense Category
Airfare
Amount *

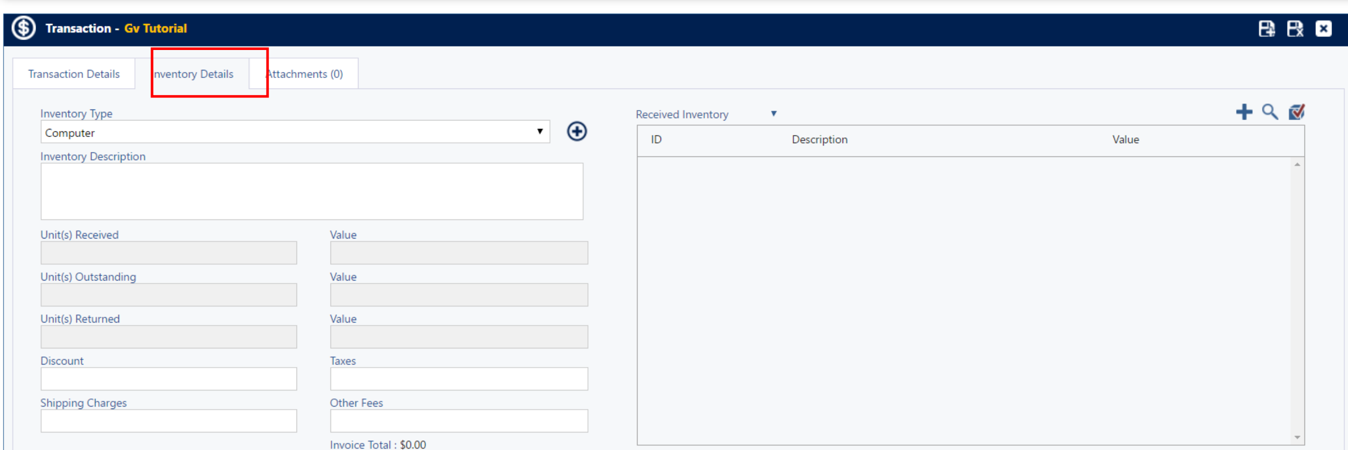



## The Transaction Form: Inventory Transactions

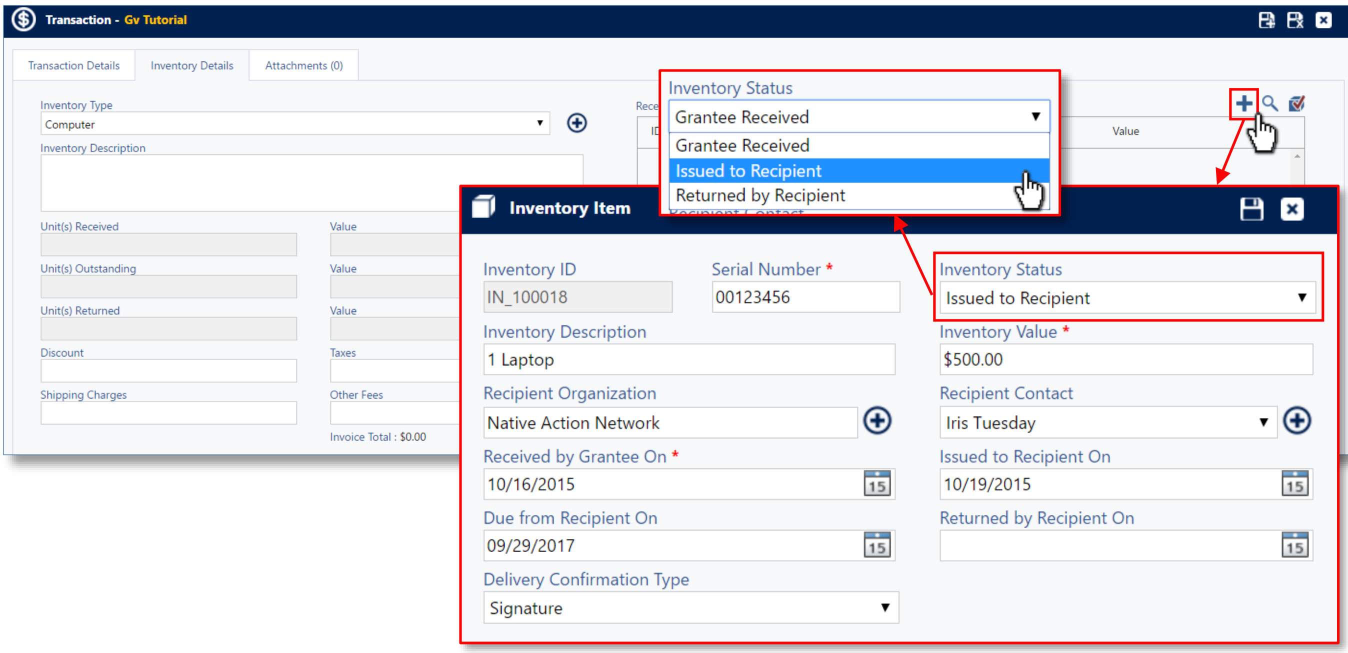
Inventory transactions function the same no matter what the Transaction Type

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

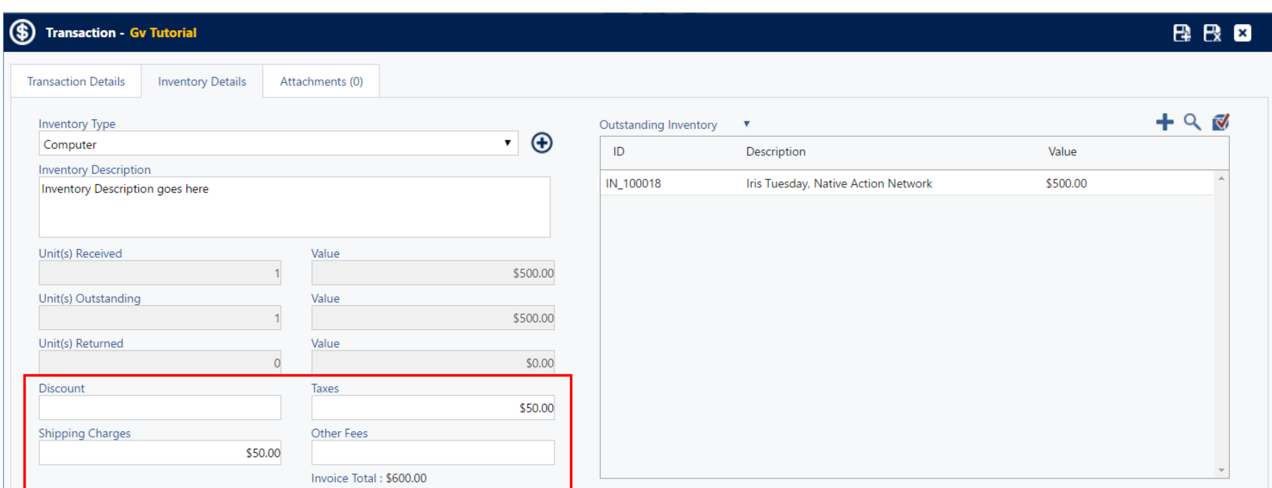


**2** Select the **+** and complete the **Inventory Item** form to add inventory
Set inventory status to Grantee Received, Issued to Recipient, or Returned by Recipient




**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.




**Save & + New** **Save & Close** **Close**

## Drawdowns & Reimbursements: Set-Up & Access

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

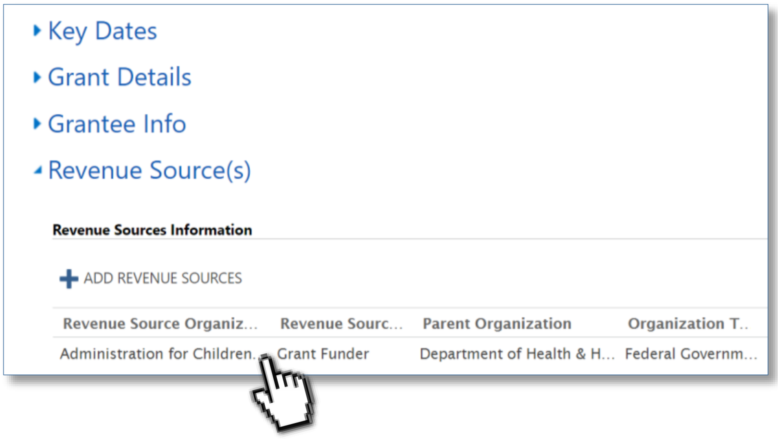
**Reimbursements** are repayments from a funder for funds already spent by a grantee

> Budget information must be saved before inputting **Drawdowns & Reimbursements**

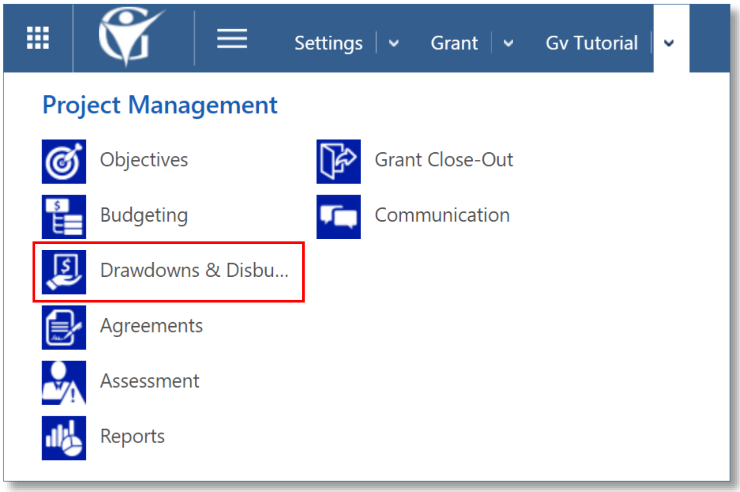
1. Begin by ensuring Revenue Sources have been entered, and the Payment Method & Payment Request Report have been identified.

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

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



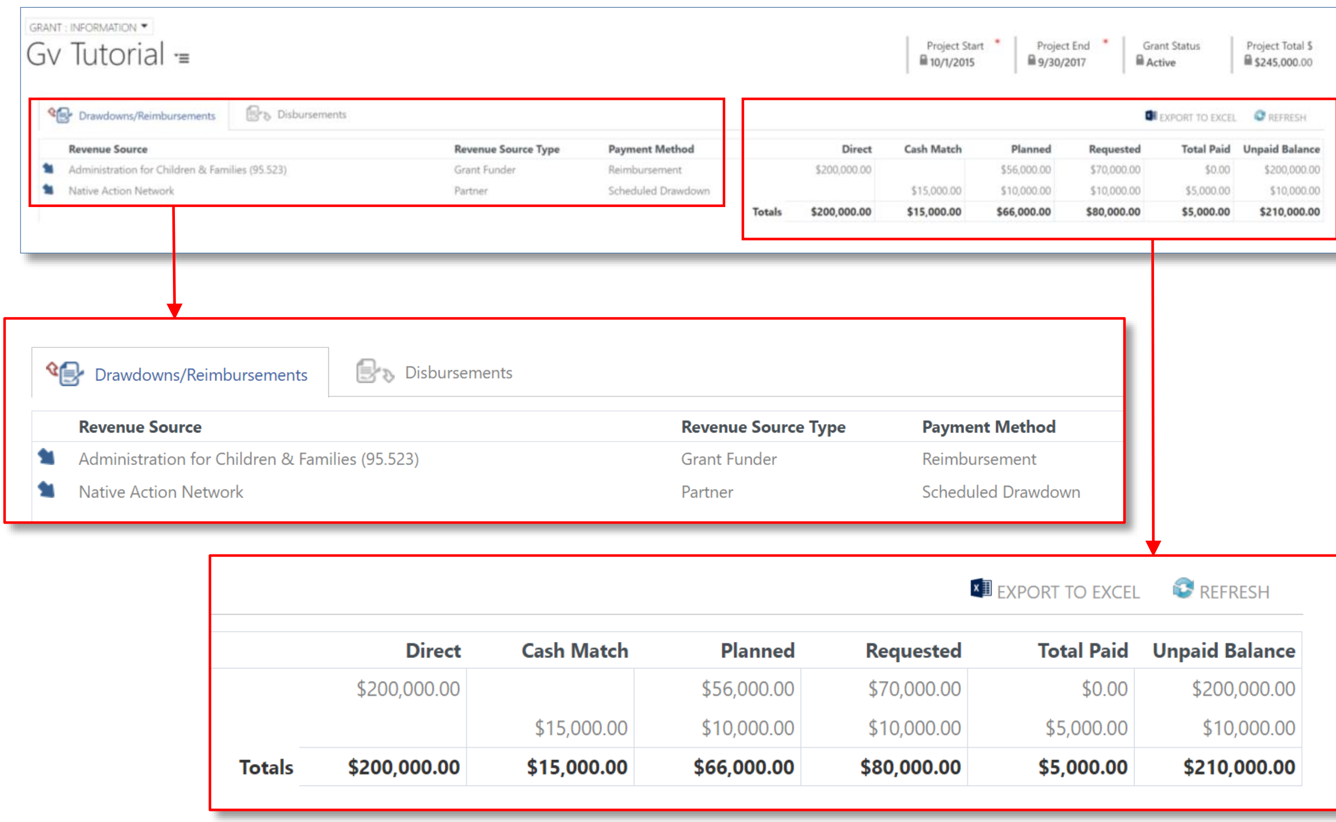

2. Select **Drawdowns & Disbursements** from the **Project Management Menu**



## 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

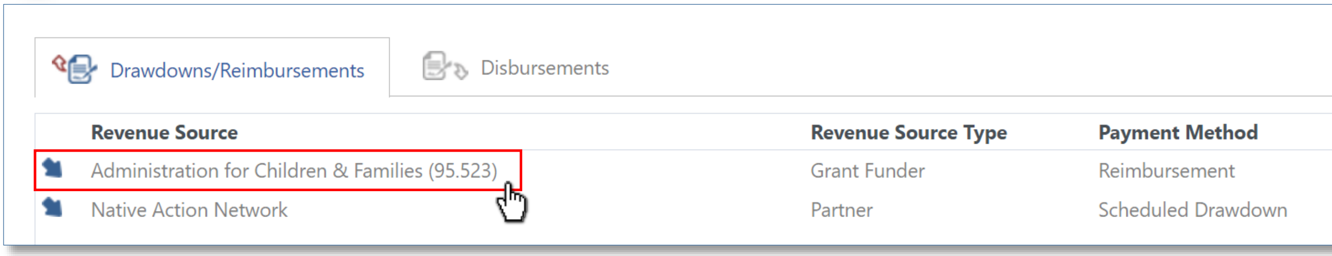



| Revenue Source | Revenue Source Type | Payment Method |
|---|---|---|
| Administration for Children & Families (95.523) | Grant Funder | Reimbursement |
| Native Action Network | Partner | Scheduled Drawdown |

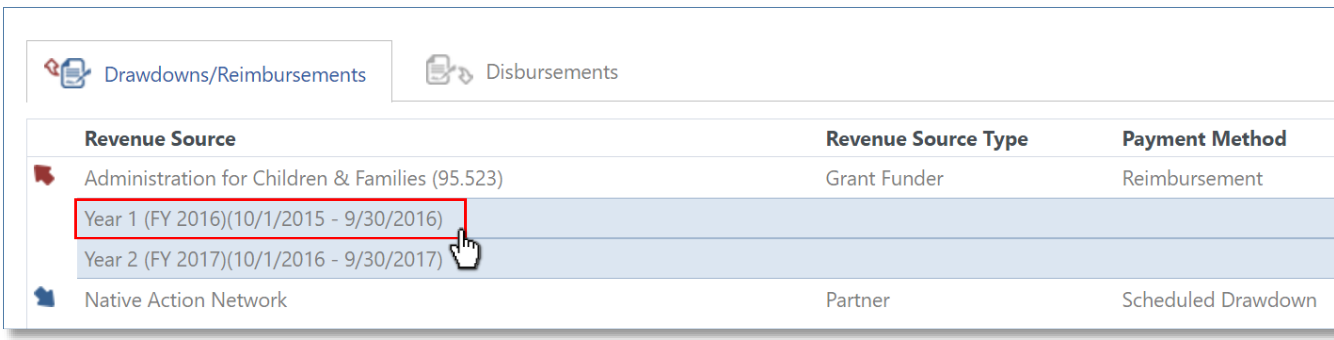
| | Direct | Cash Match | Planned | Requested | Total Paid | Unpaid Balance |
|---|---|---|---|---|---|---|
| | $200,000.00 | | $56,000.00 | $70,000.00 | $0.00 | $200,000.00 |
| | | $15,000.00 | $10,000.00 | $10,000.00 | $5,000.00 | $10,000.00 |
| **Totals** | **$200,000.00** | **$15,000.00** | **$66,000.00**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

## Drawdowns & Reimbursements: Add Planned Drawdown/Reimbursement

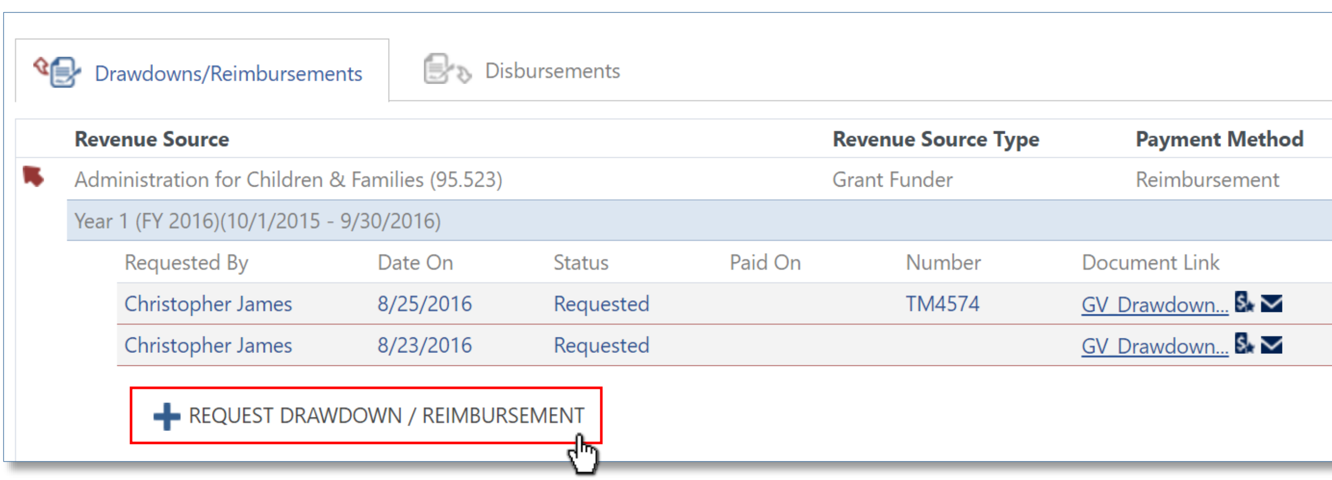
1 Select a Revenue Source or Partner to display all associated years



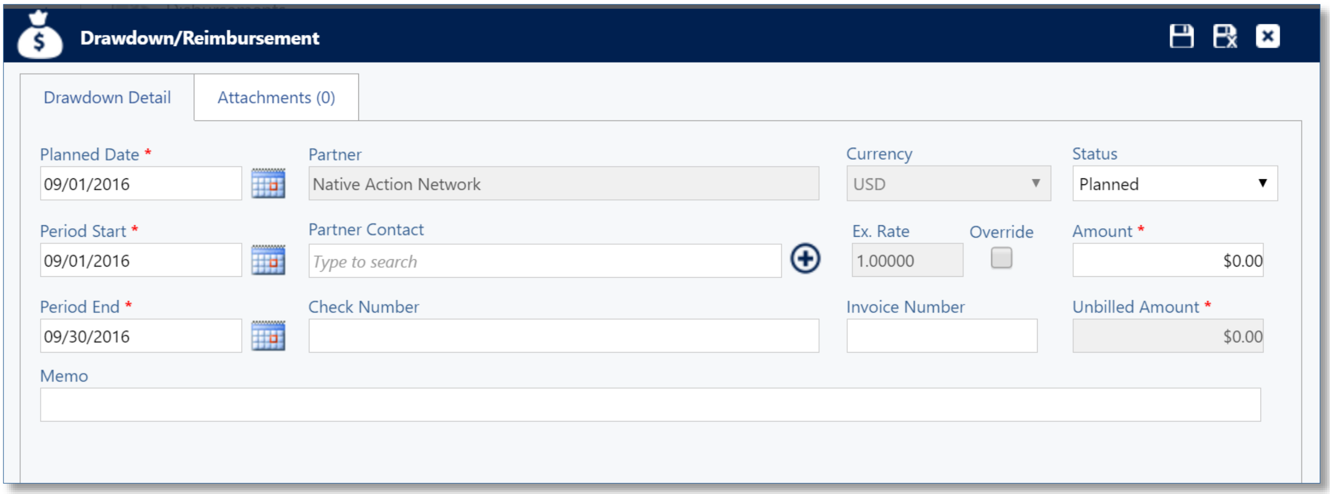

2 Select a project year to view all existing drawdown/reimbursement transactions or to add a new drawdown/reimbursement transaction



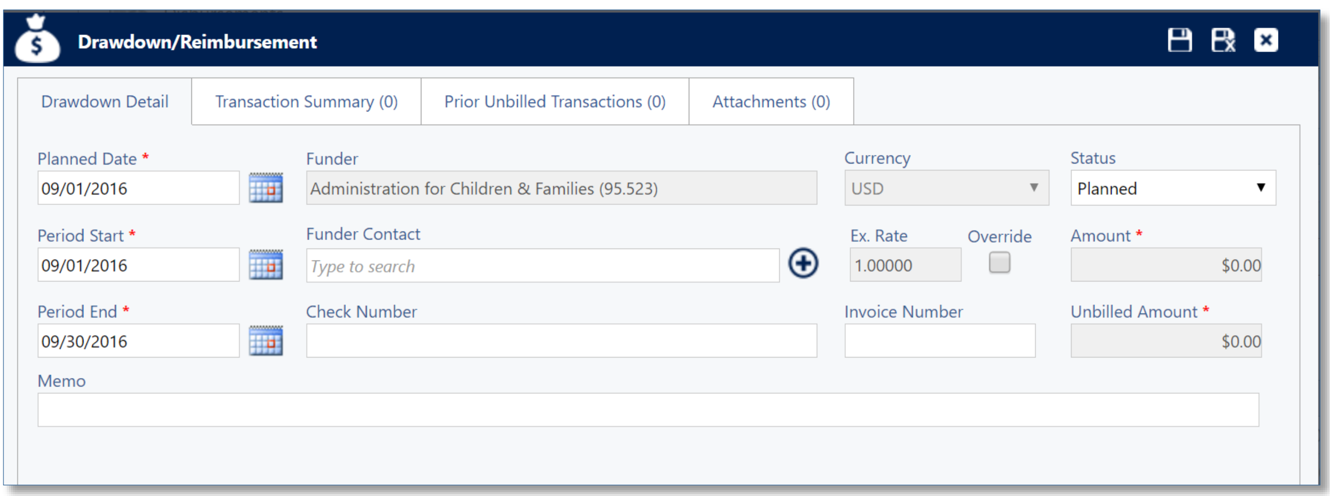

3 From here, users may add a new transaction by selecting **Request Drawdown/Reimbursement**



**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




**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)

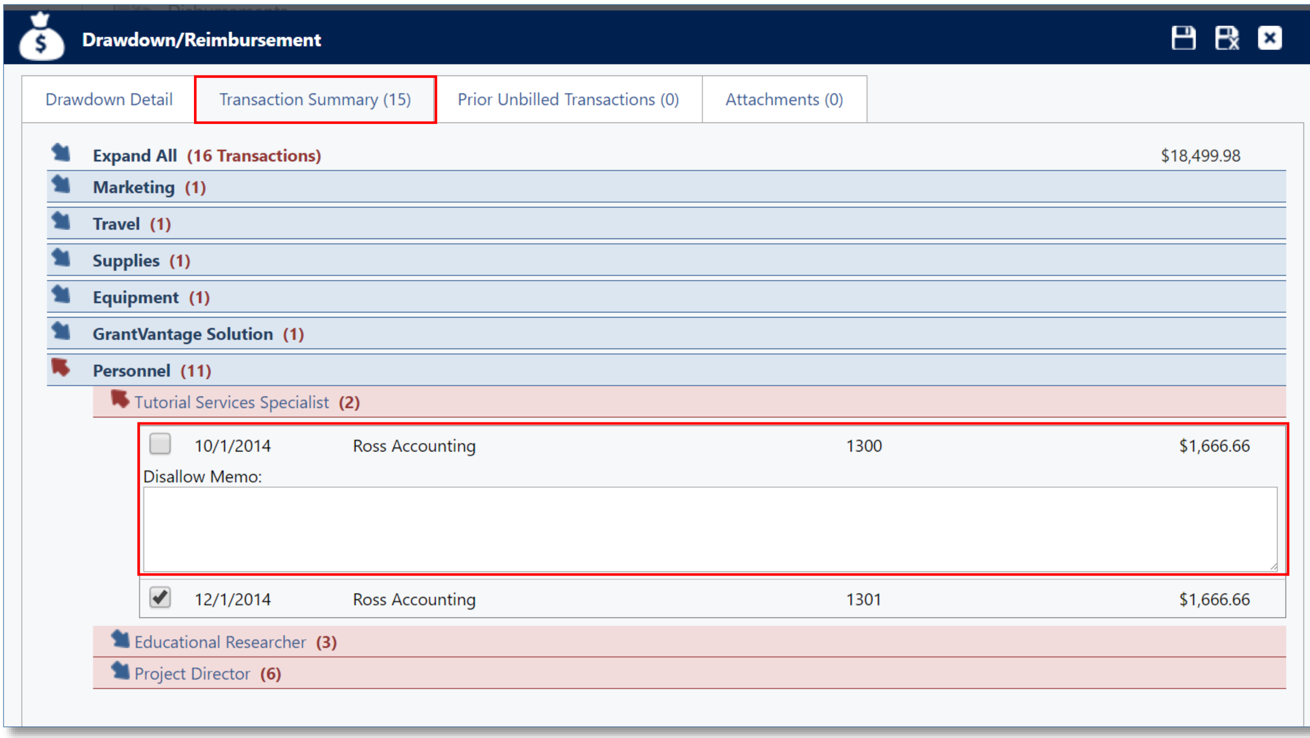



**$b_2$** The **Period Start** and **Period End** fields are especially important when entering reimbursement information. These fields will determine which transactions appear in the **Transaction Summary** tab and **Prior Unbilled Transactions** tab

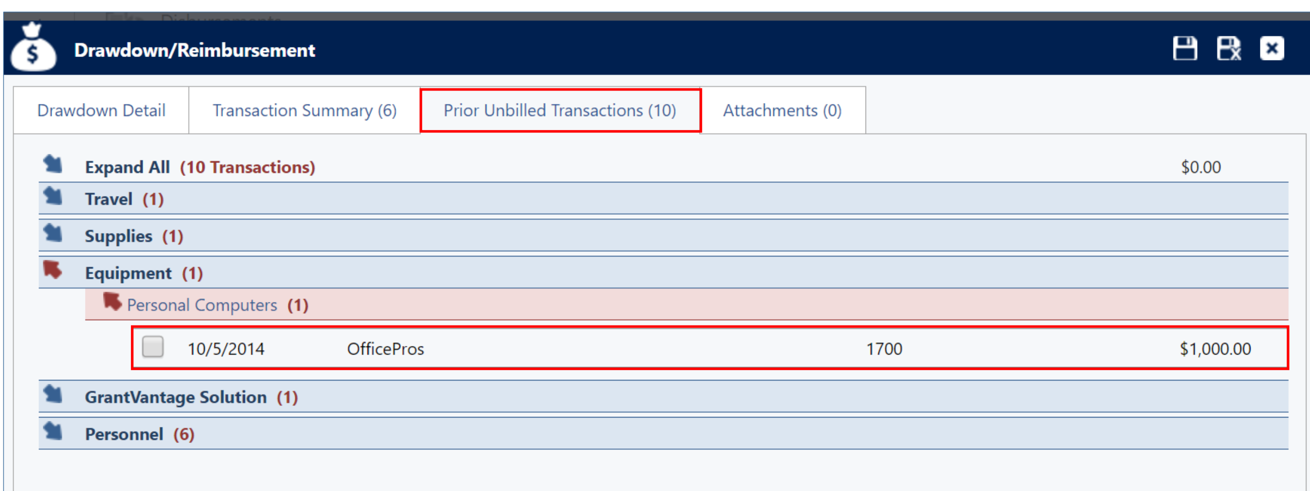
i

**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

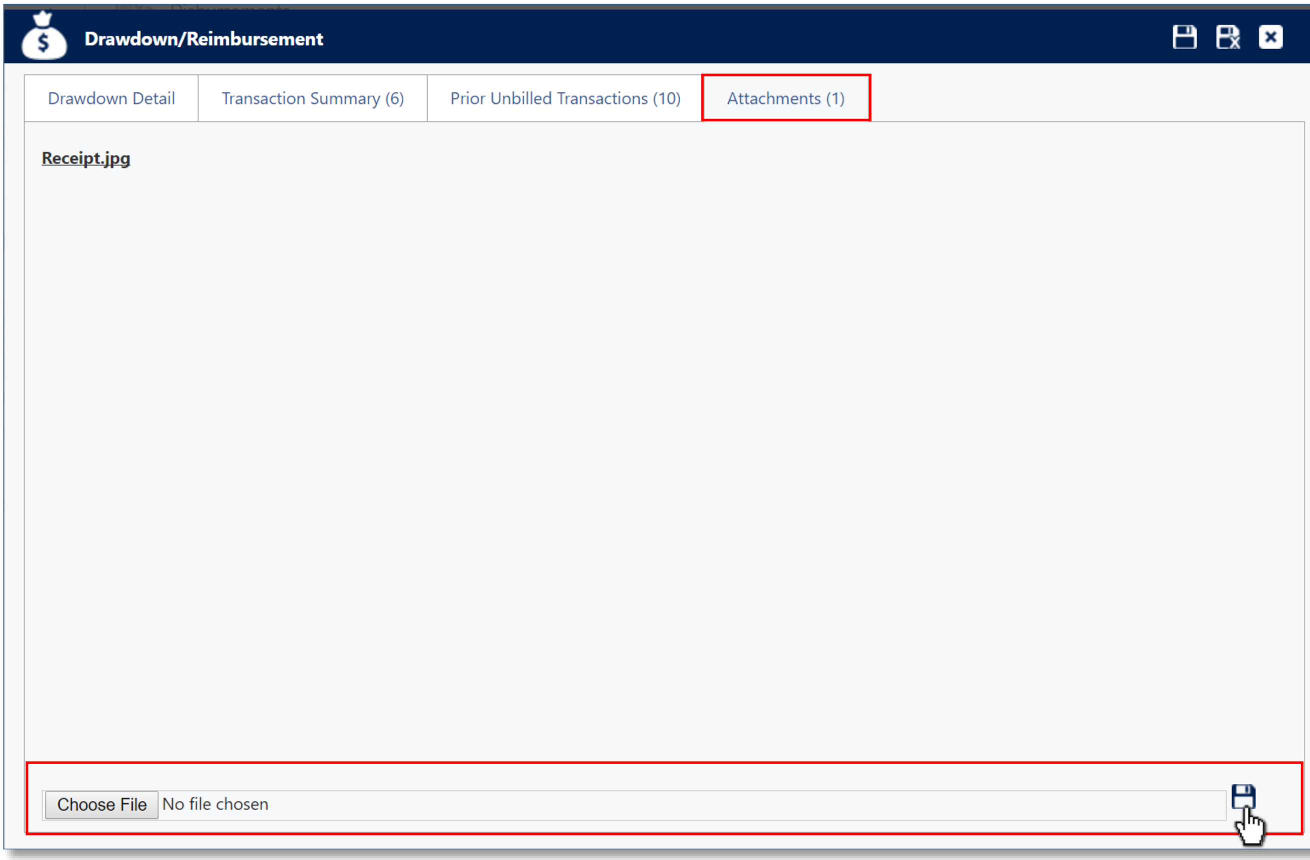
b3 Once all **Drawdown Detail** information is entered, including the **Period Start** and **Period End** fields, select the **Transaction Summary** tab to determine transactions for reimbursement. For transactions ineligible for reimbursement, deselect the transaction and enter a **Disallow Memo**



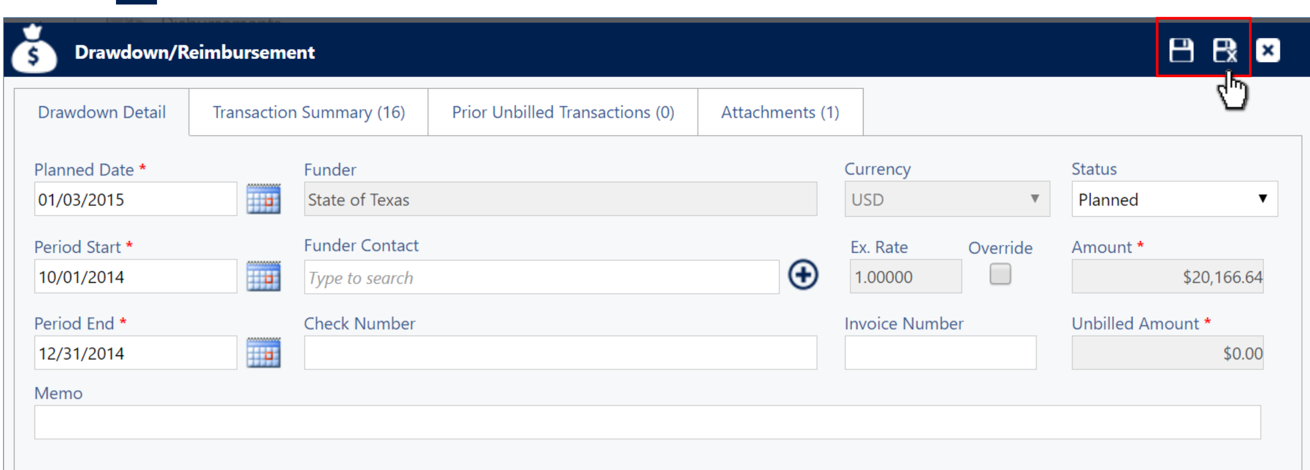

b4 To add previous unreimbursed transactions to the request, go to the **Prior Unbilled Transactions** tab and select transaction(s) for reimbursement



**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



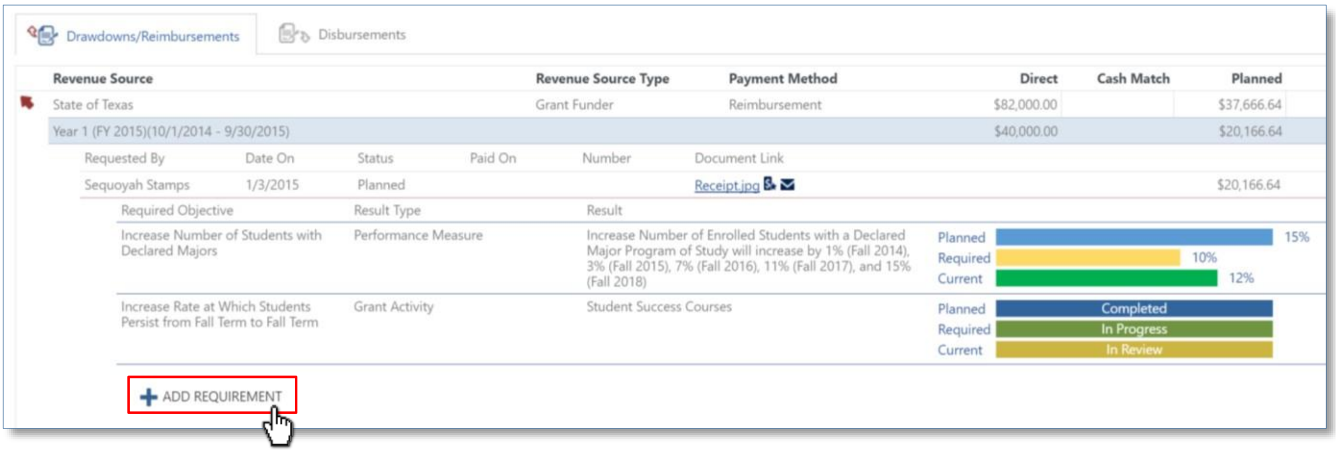

**5** Once all Drawdown or Reimbursement information is saved. Select the save-and-close icon in the top right of the window, which will save the transaction and return you to the **Drawdowns/Reimbursements** Page. Select the save icon to save the transaction and stay in the form



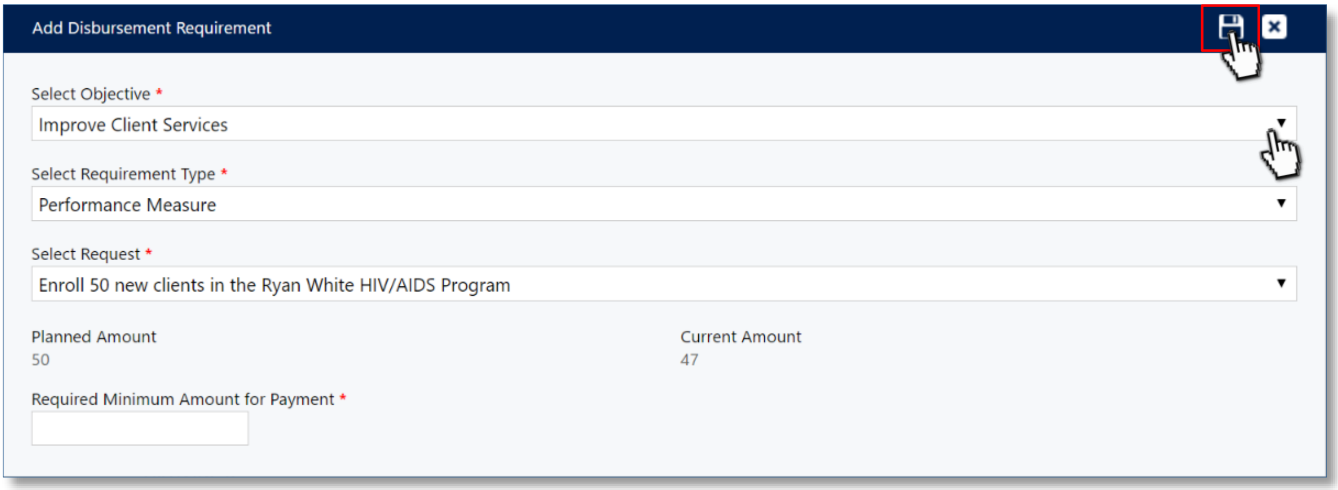
## Drawdowns & Reimbursements: Performance-Based Payments

**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

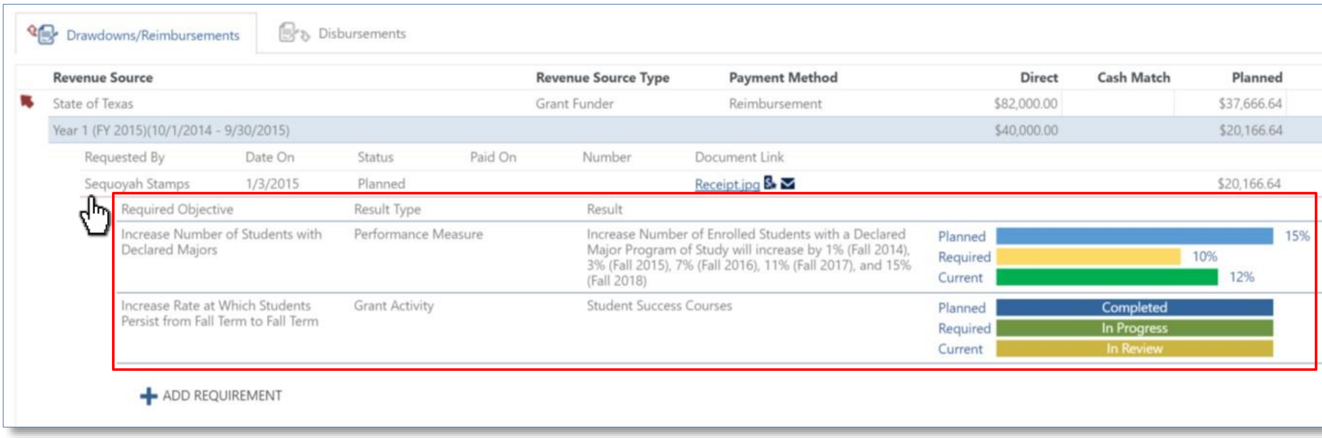
To add a requirement, select the Drawdown or Reimbursement to which performance data will be linked, then select **Add Requirement**




**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

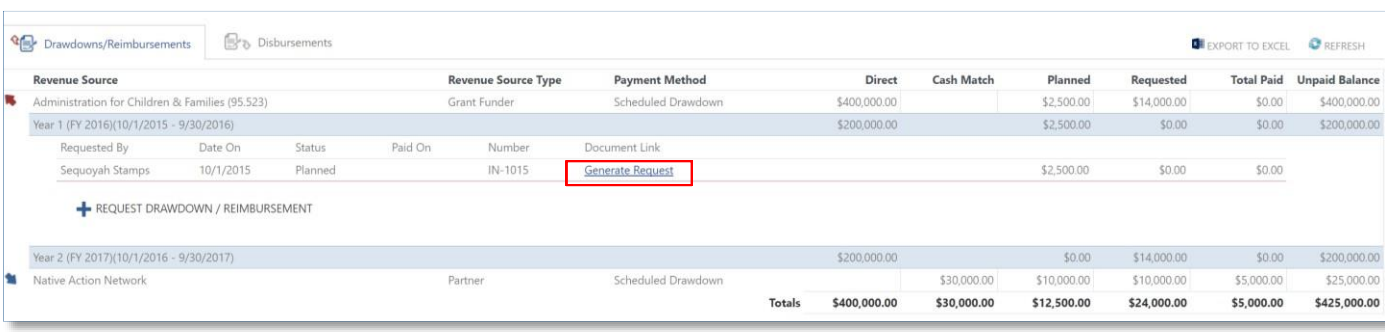


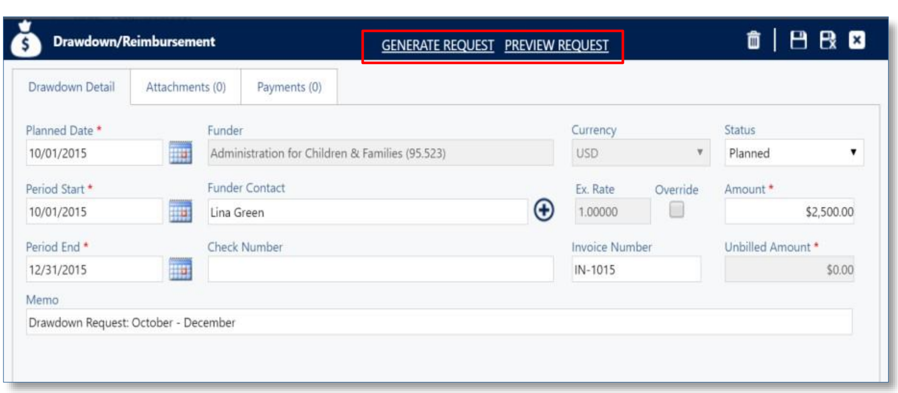
Once saved, requirements will appear below the drawdown
Each Performance Measure & Activity will display a **Planned, Required,** or **Current** value marker



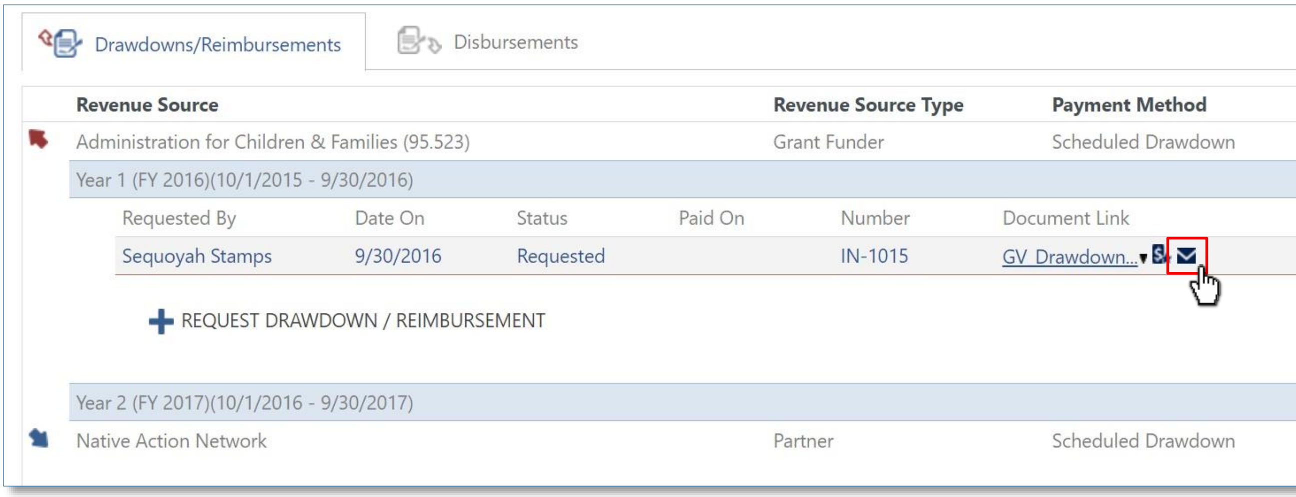

## Drawdowns & Reimbursements: Generating Requests

**1** 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.

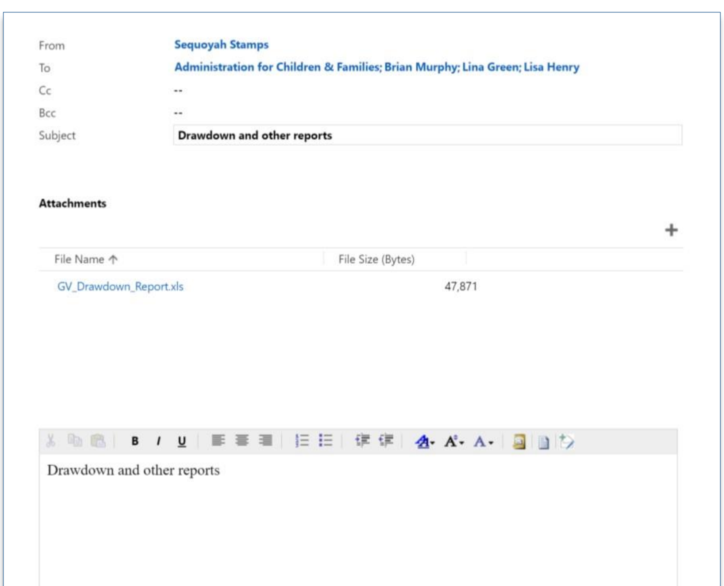


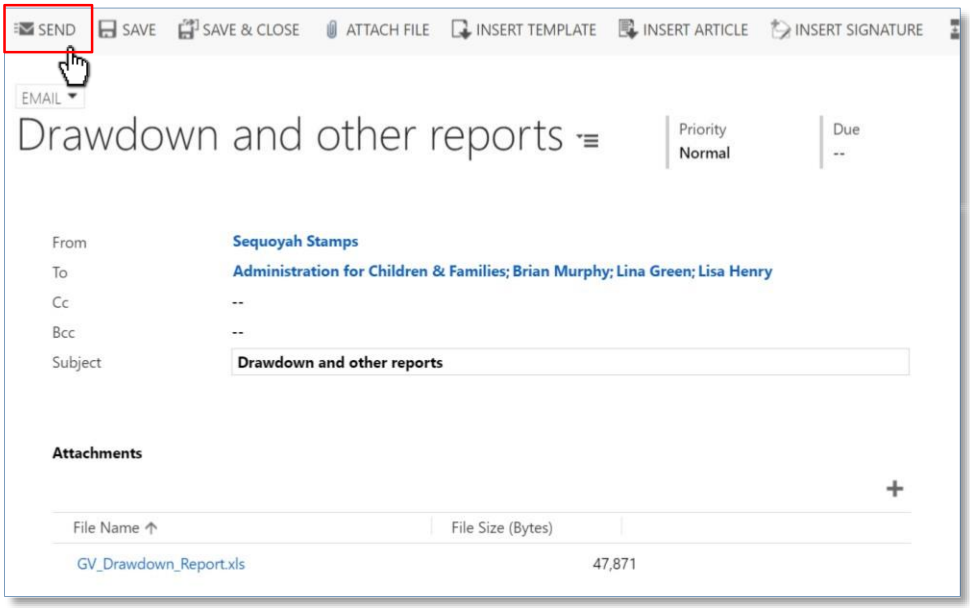
**2** When a request is generated, the transaction's status changes from Planned to **Requested**
At this point, users may use the in-mail feature and send requests via email directly to any outside revenue sources or partners
To do this, exit the transaction and select




**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

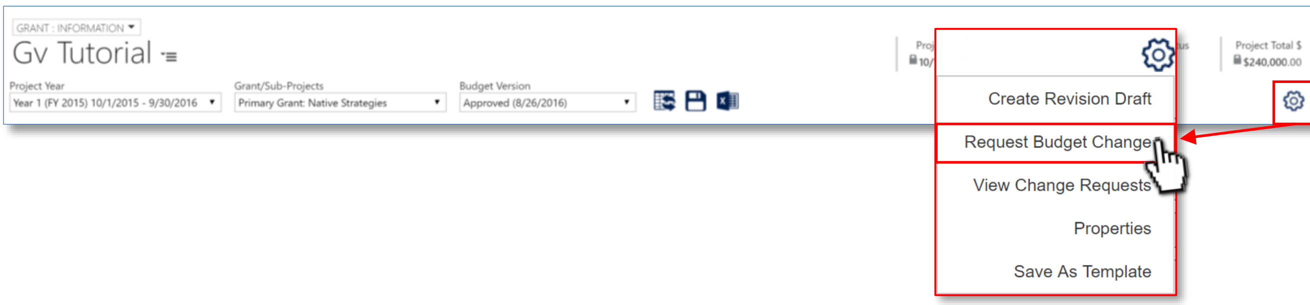


**4** With all desired information entered, select **Send** in the White Ribbon Bar
The email will be sent and the page will return to Drawdown & Disbursements

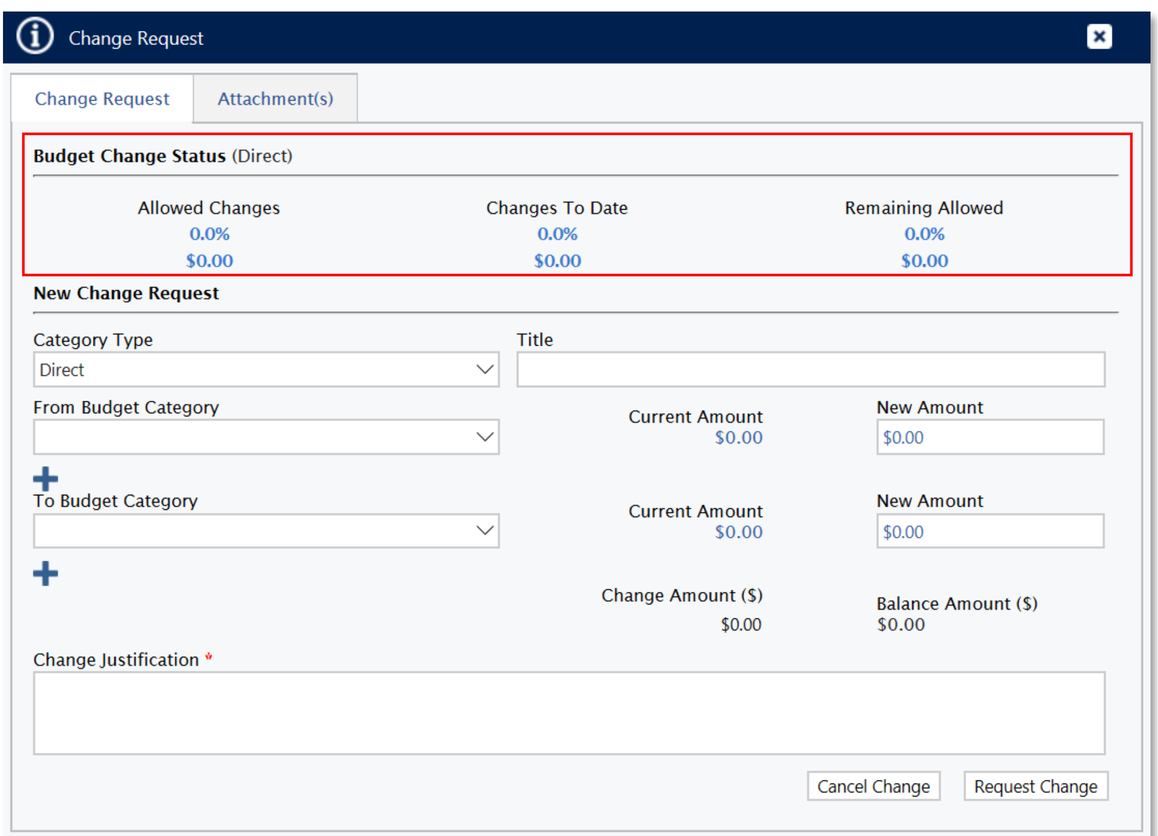


## How to Request a Budget Change

1. **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**

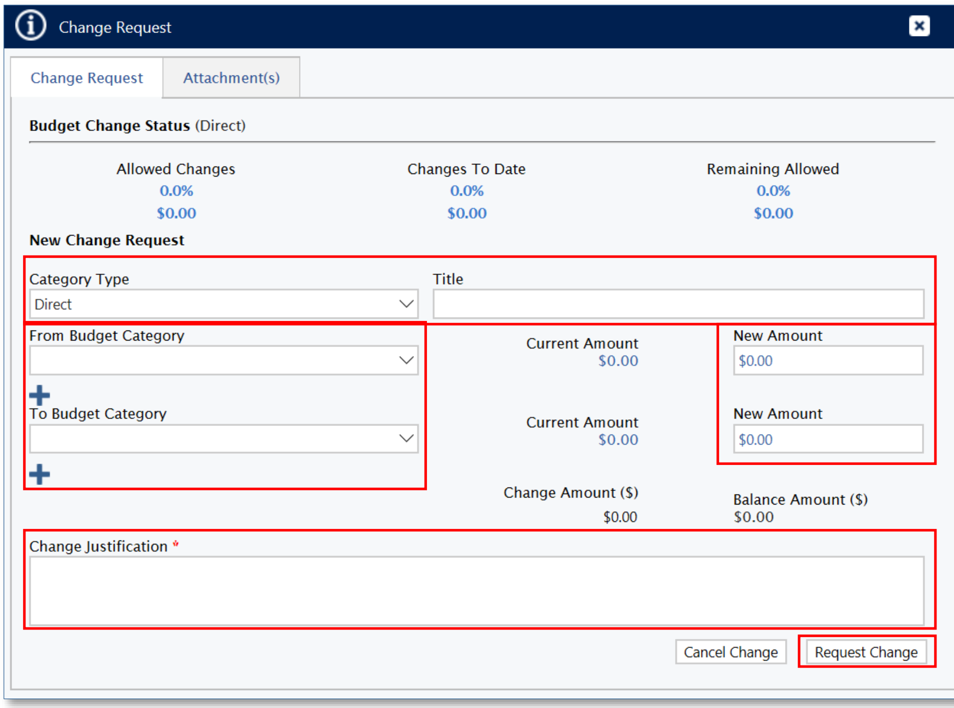



2. The **Budget Change Status** at the top of the Change Request Form reflects the **Allowable Budget Change** value based on the **Budget Change Tolerance** entered in the **Budget Properties**
   As Change Requests are approved, the **Changes to Date** and **Remaining Allowed** percentages and monetary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



3

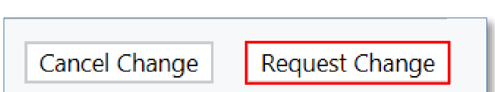
- Select the **Category Type** (Direct, Cash Match, or In-Kind)
- Enter a **Title** for the Request
- Use the **From Budget Category** picklists to determine the category the funds will be moving **from**
- Use the **To Budget Category** picklist to determine the category the funds will be moving **to**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




4

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

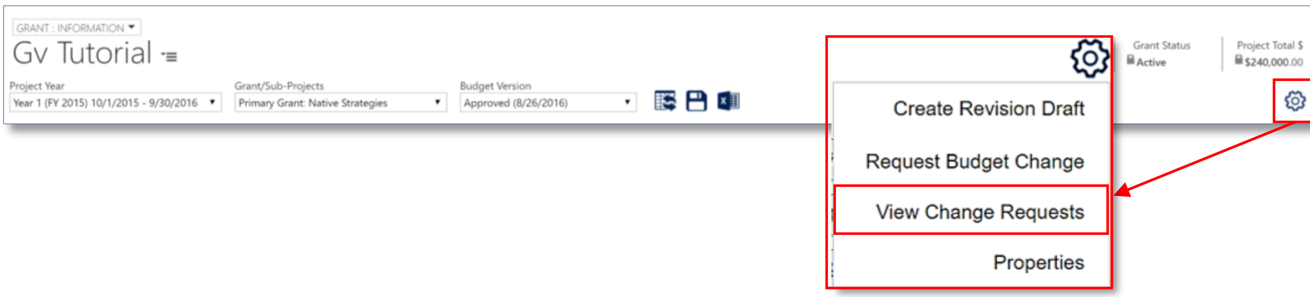

- Once desired changes & attachments have been entered, select **Request Change**



## View Budget Change Requests

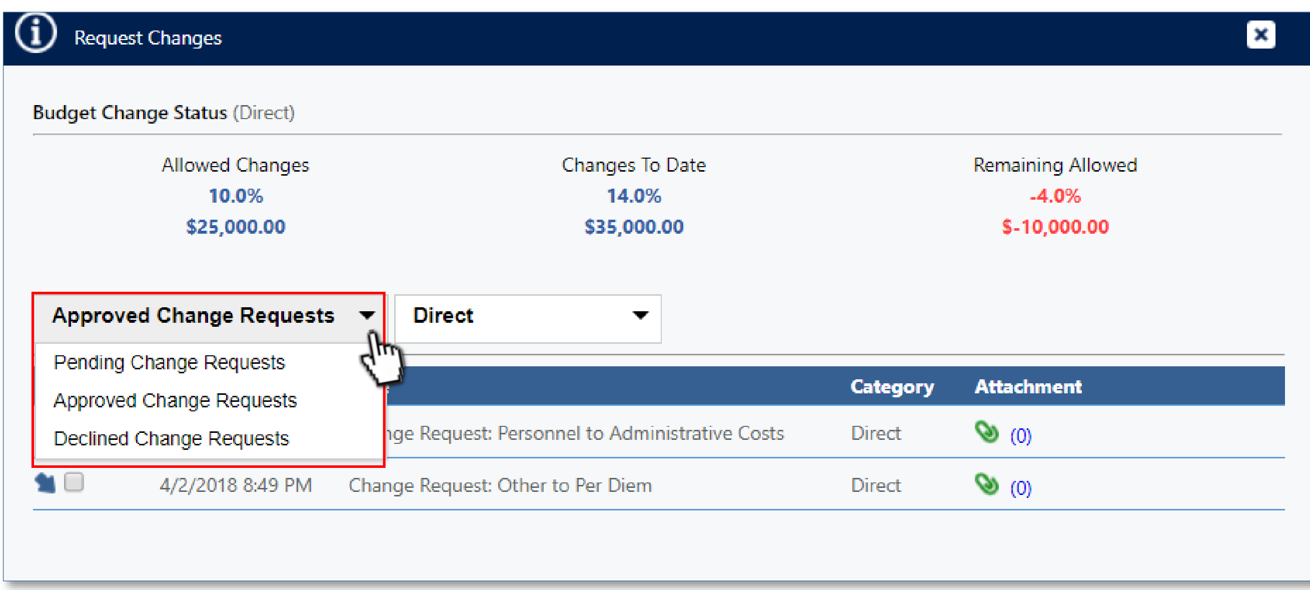
1

- 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



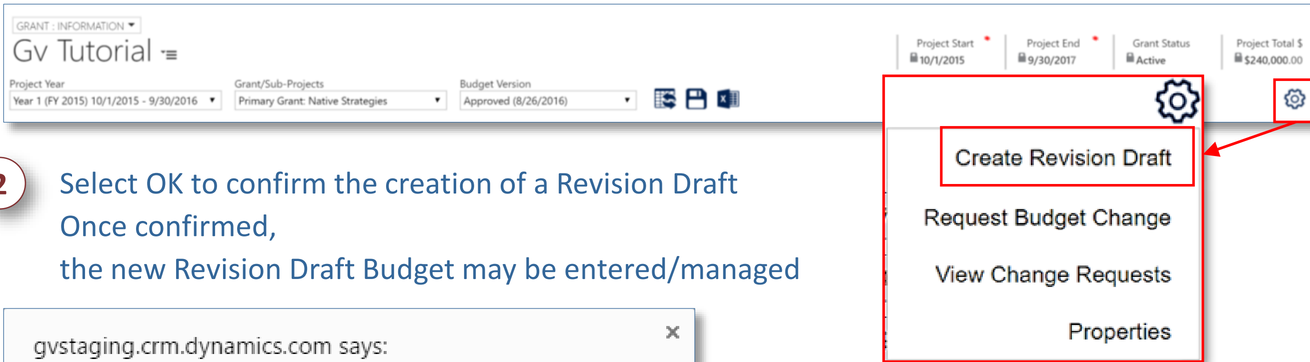

2

- 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

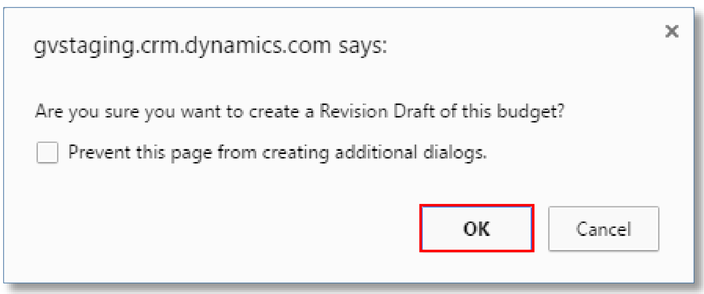


## Budget Revisions

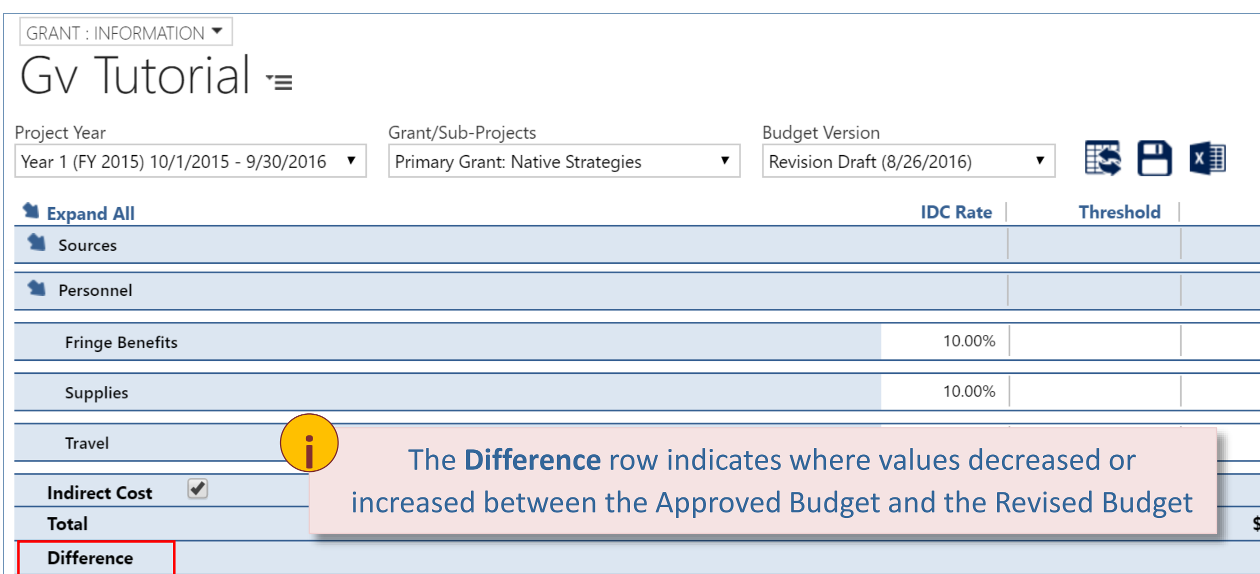
1. If many changes are needed for an Approved Budget or the changes exceed the budget change tolerance, users have the option of creating a **Budget Revision**
Select **Create Revision Draft** from the **Settings** menu of an **Approved Budget**.




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

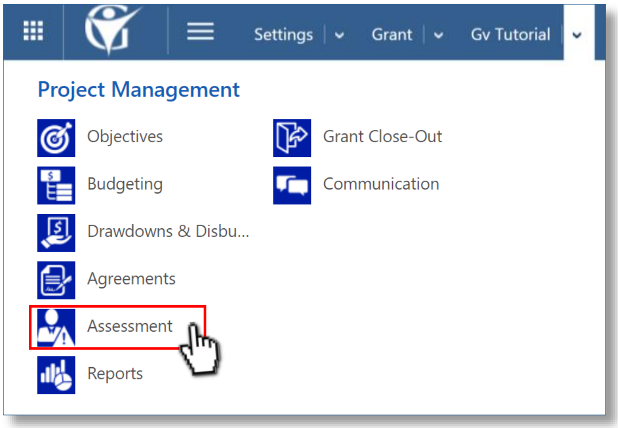



3. As budget values are changed, a new row beneath Total, labeled **Difference** displays the differences between the previous budget and the current Revision Draft
Green indicates the entered budget value is lower than the previous value
Red indicates the entered budget value is higher than the previous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

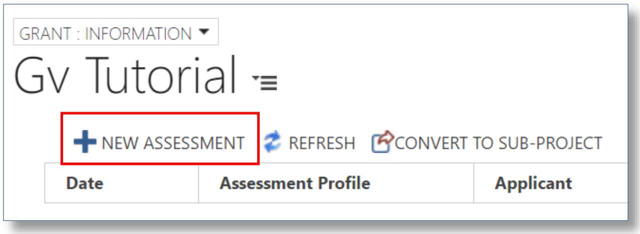


## Performing Assessments

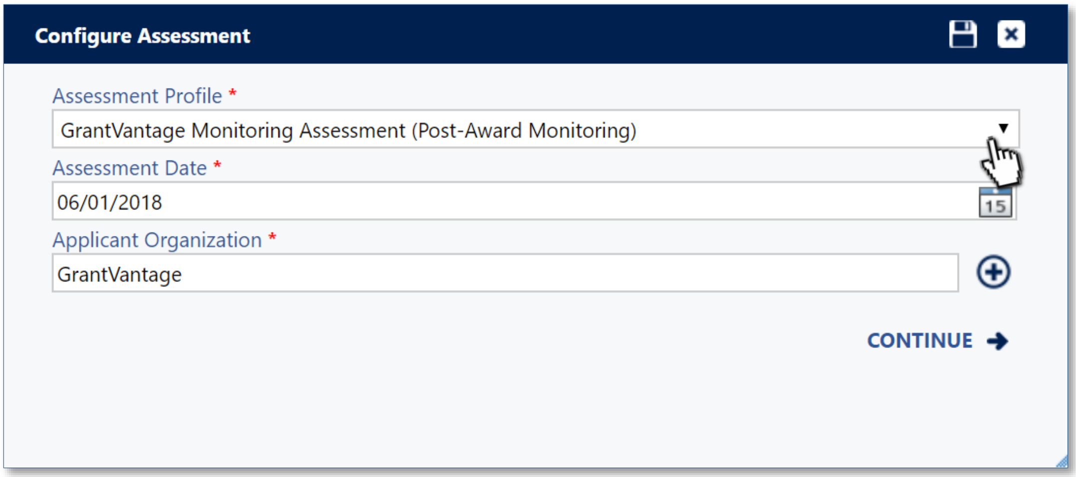
1. To perform an assessment, open the projects that will be assessed
   Select **Assessment** in the Project Management Menu



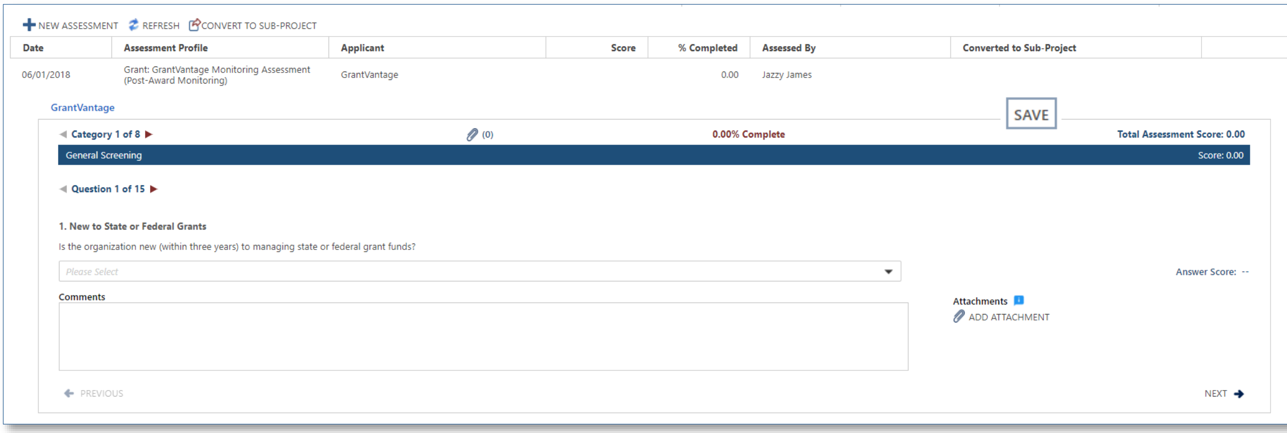

2. Select **New Assessment** to select a profile



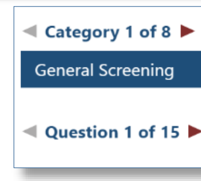

3. Select the desired Assessment Profile
   Enter the Assessment Date
   Search & select the Applicant Organization Name



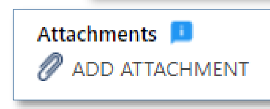
4 When an Assessment is selected, users may begin responding to each metric question




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

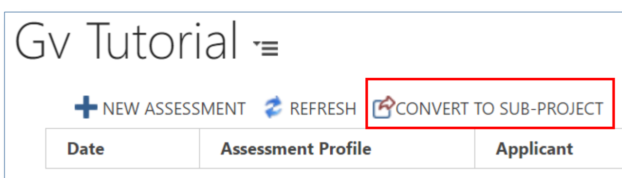



6 Users may select **Add Attachment** to add attachments to each metric

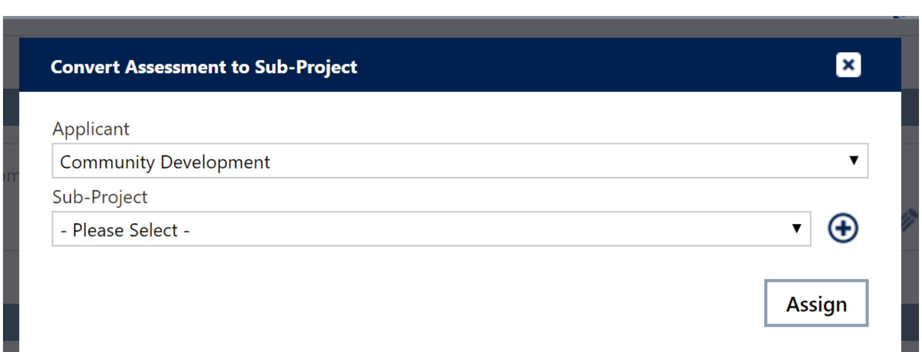



During the Assessment users may select SAVE to save the Assessment and return to it at a later time

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

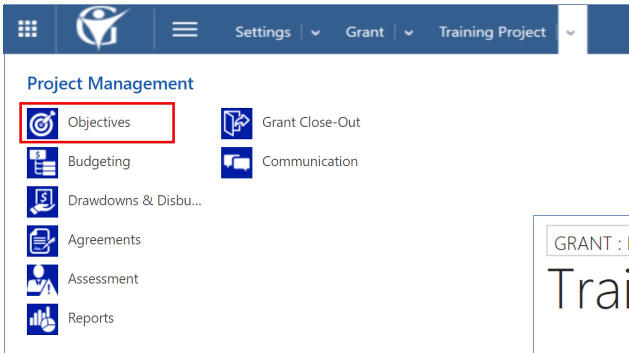


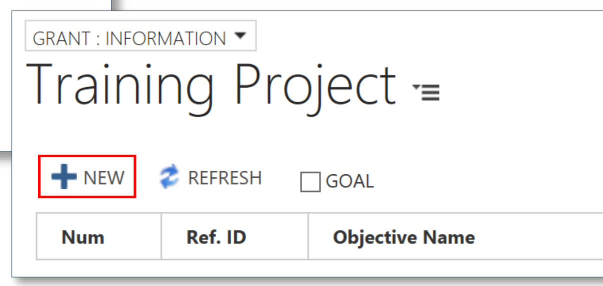

8 Select an existing sub-project or select the **+** sign to add a new sub-project. Enter the new sub-project information in the **Sub-Project Form**, select Save then select **Assign**



## Objectives

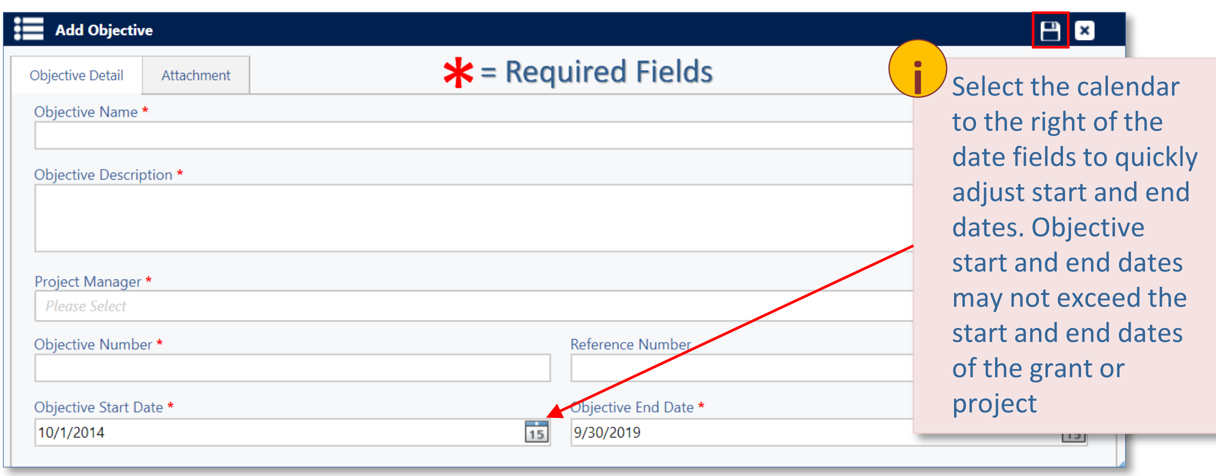
**1** Open the Objectives Page for a project by selecting Objectives in the Project Management Menu the objectives grid by selecting **Objectives** from the **Blue Ribbon Bar**




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

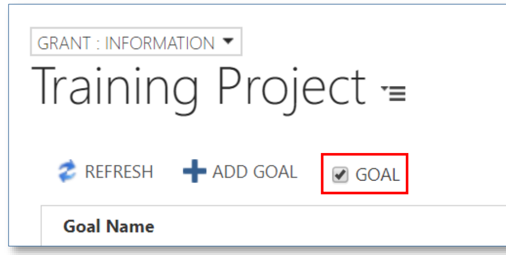
**3** Enter objective data, select a project manager, and set the objective start & end dates, then select the **Save** icon



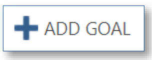

**4** Select the **Attachments** tab to upload supplemental documentation with the Objective Select **+Add Attachment** and follow on-screen prompts

## Goals

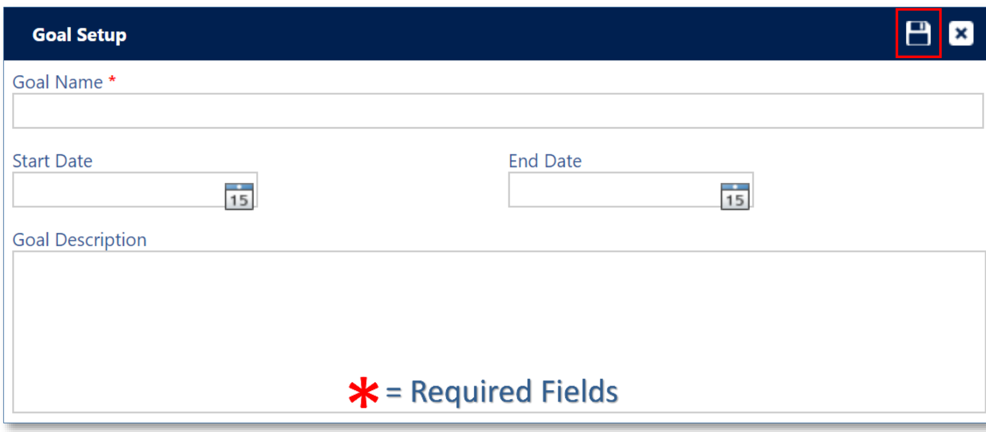
1 **Goal:** In GrantVantage, Objectives may be attributed to individual project goals in support of the project



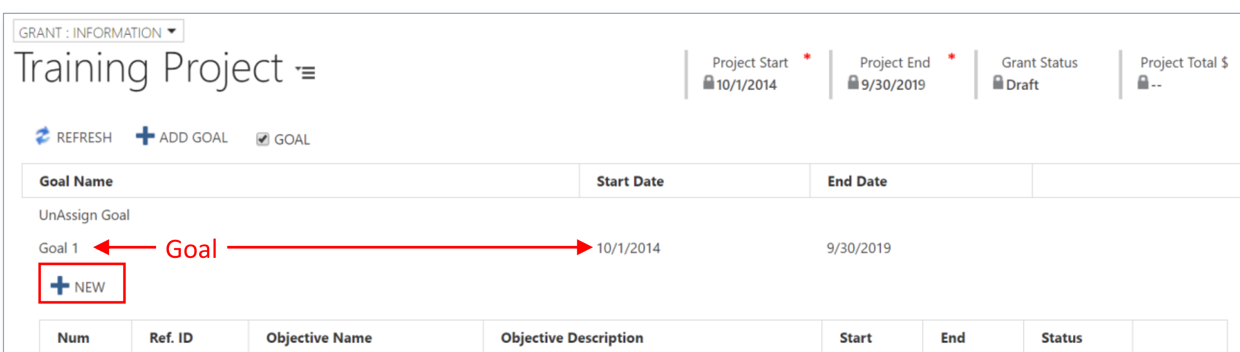

To enter a Goal, first select the Goal checkbox

Then select 


Enter Goal details, then save

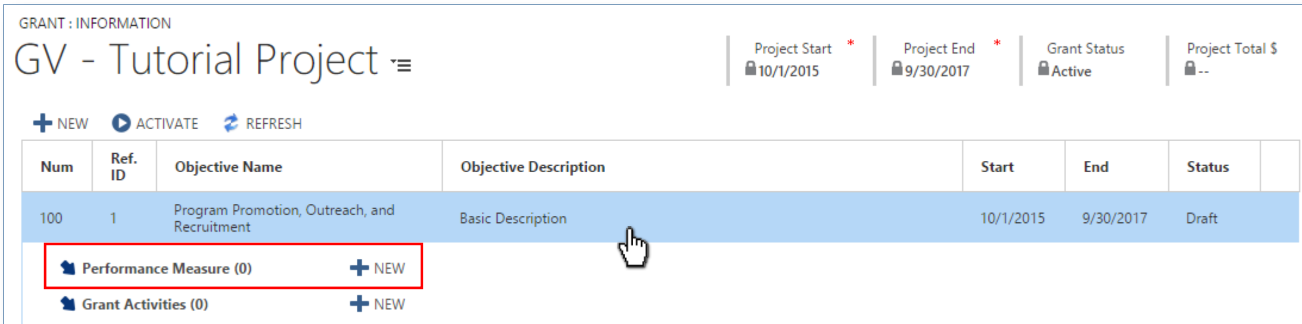



2 Objectives attributed to the Goal may be added once the goal is saved

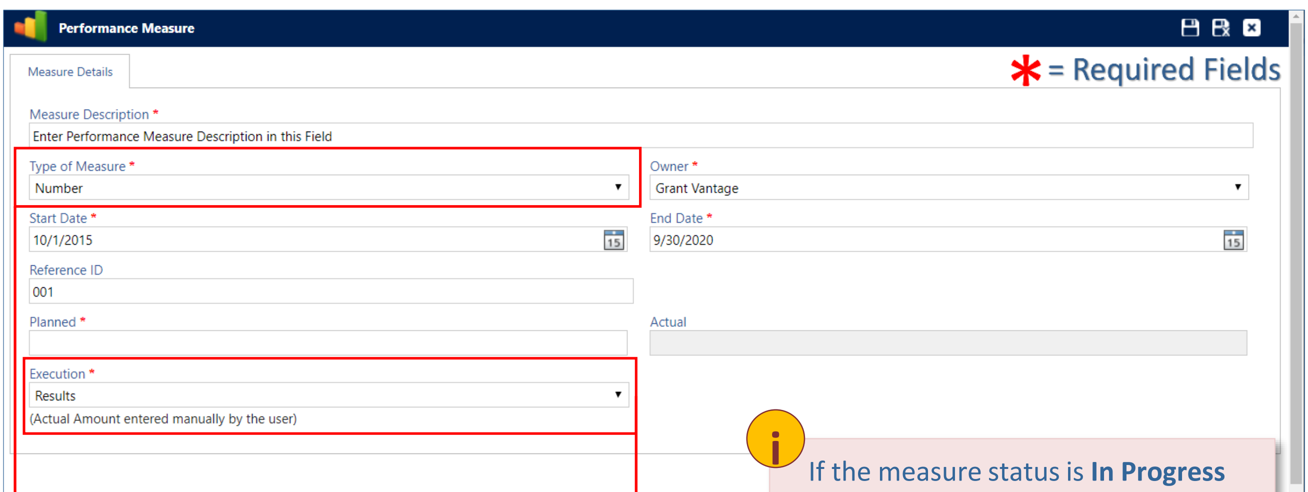


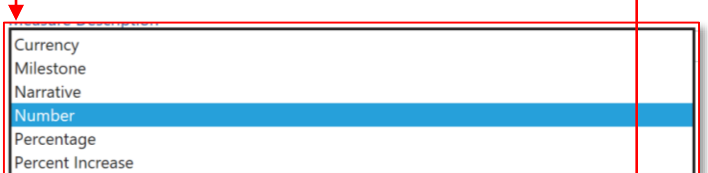
## Performance Measures

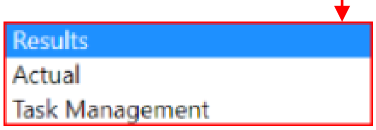
1. Select the objective to add a Performance Measure then select **+New** next to **Performance Measure**




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



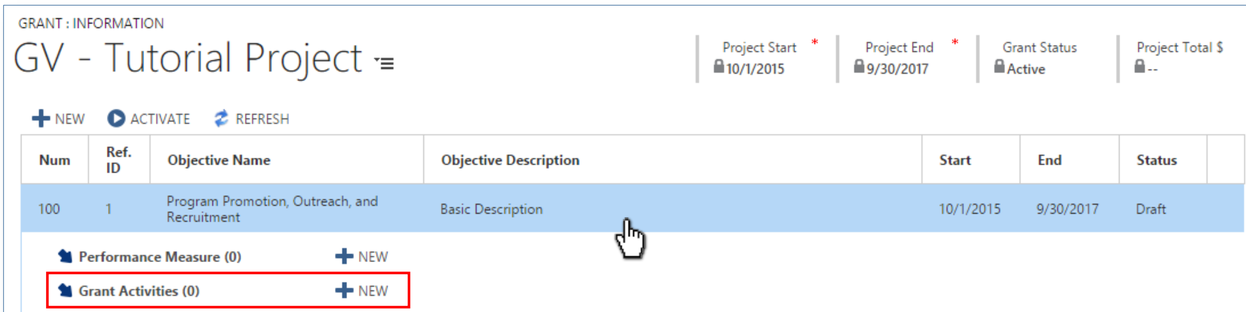



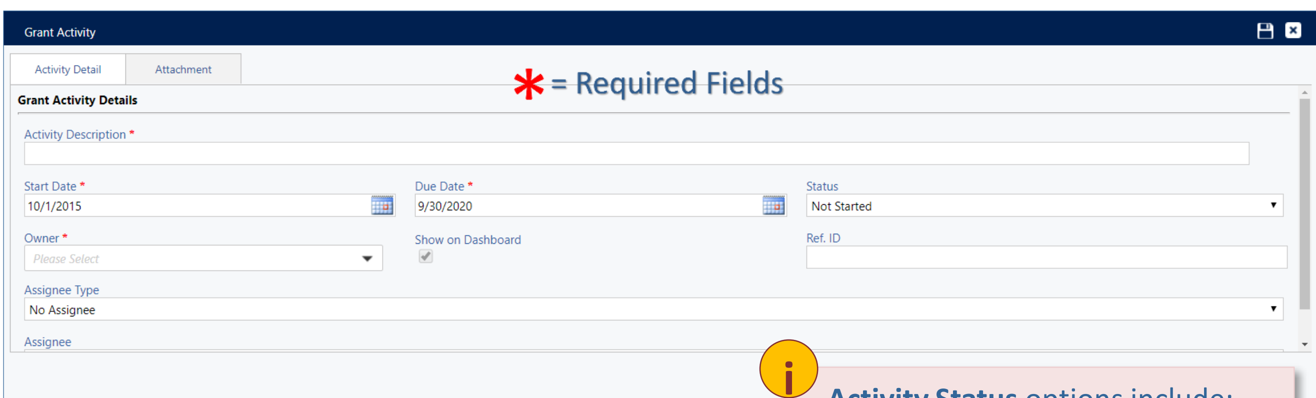

If the measure status is **In Progress** users may add actual values for all money, number, and percentage types of measures. For milestone measures, users will select the Measure Status from a dropdown

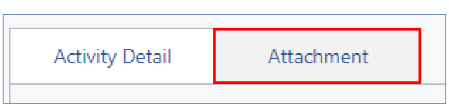
## Activities

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




**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




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

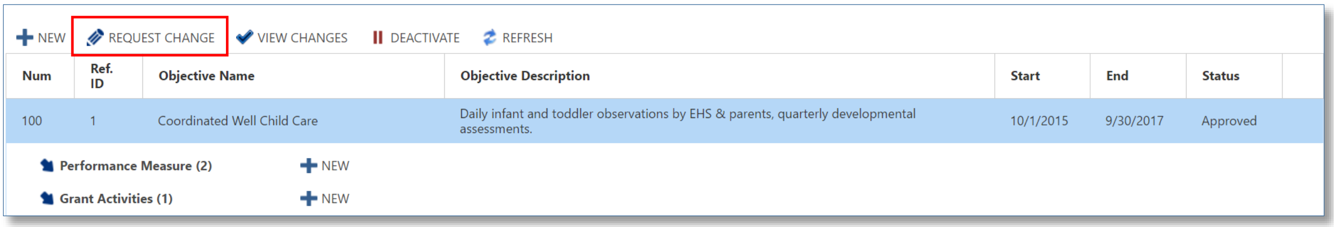
**Activity Status** options include:

- Not Started
- Pending
- In Review
- In Progress
- Needs Approval
- Completed
- Stalled

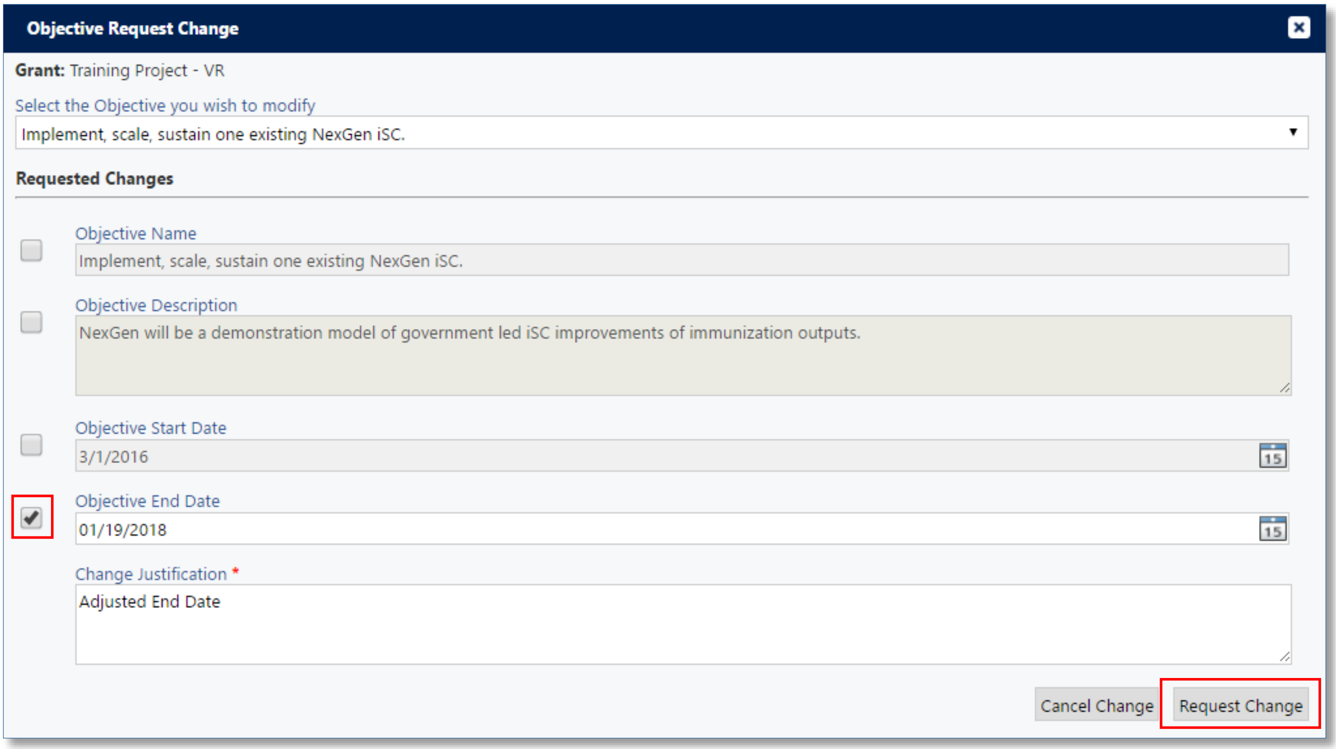
Objectives, Performance Measures and Activities that have been *activated* may no longer be altered without first submitting an Objective Change Request to your GrantVantage Administrative User

## Create & Submit an Objective Change Request

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

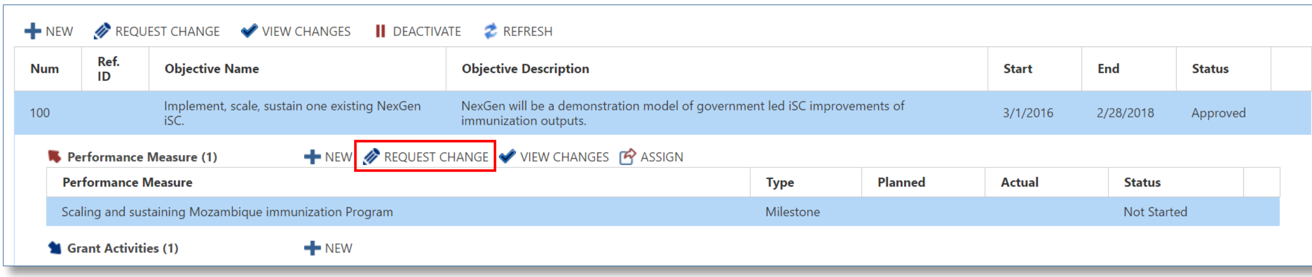


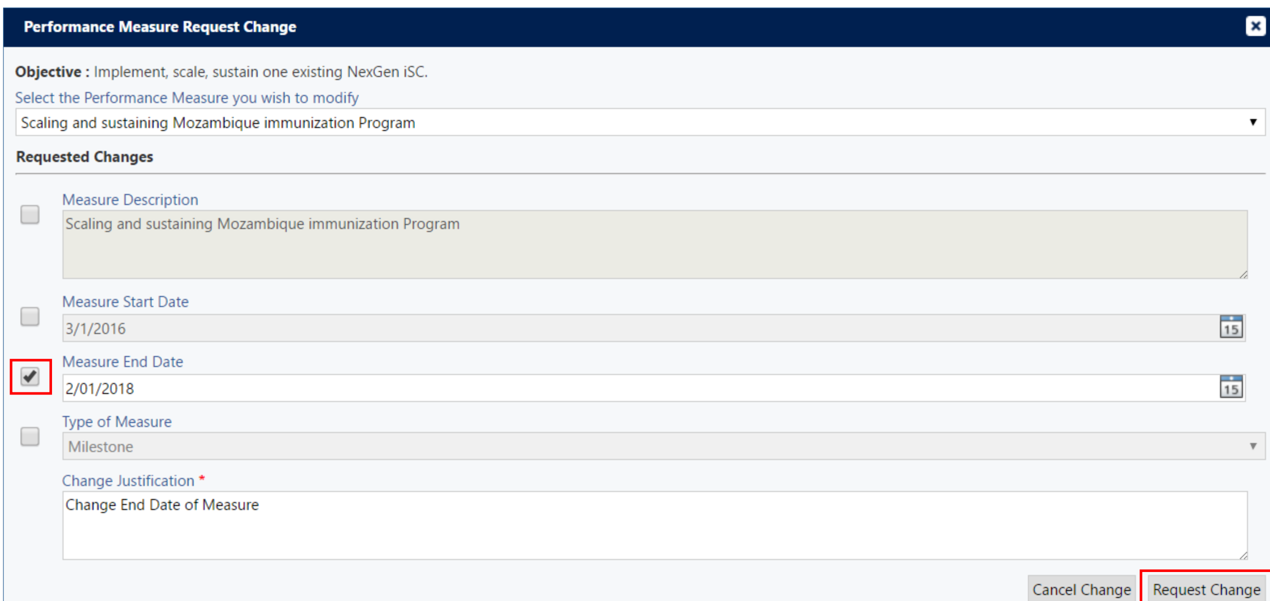

2
- Select the section of the Objective in which a change is needed
- Enter desired changes
- Enter a Change Justification (purpose of request)
- Select Request Change



## Performance Measure Change Requests

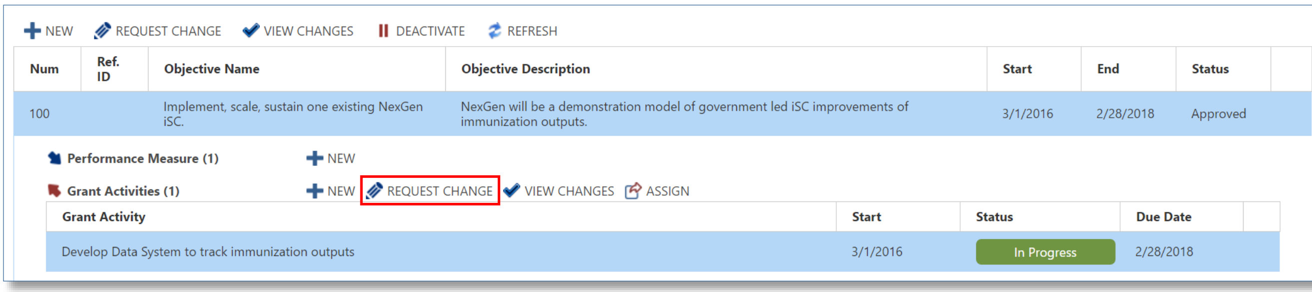
**1** To view & **Request Performance Measure Change Requests** select the performance measure then select **Request Change**

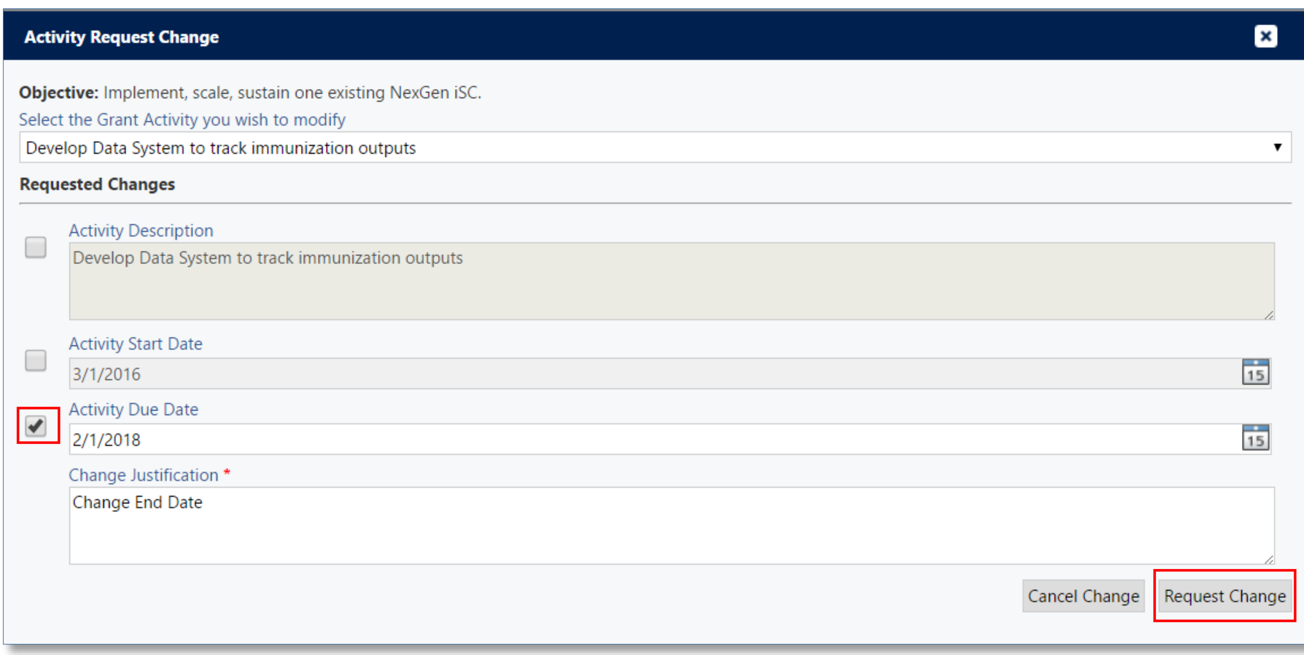


## Activity Change Requests

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



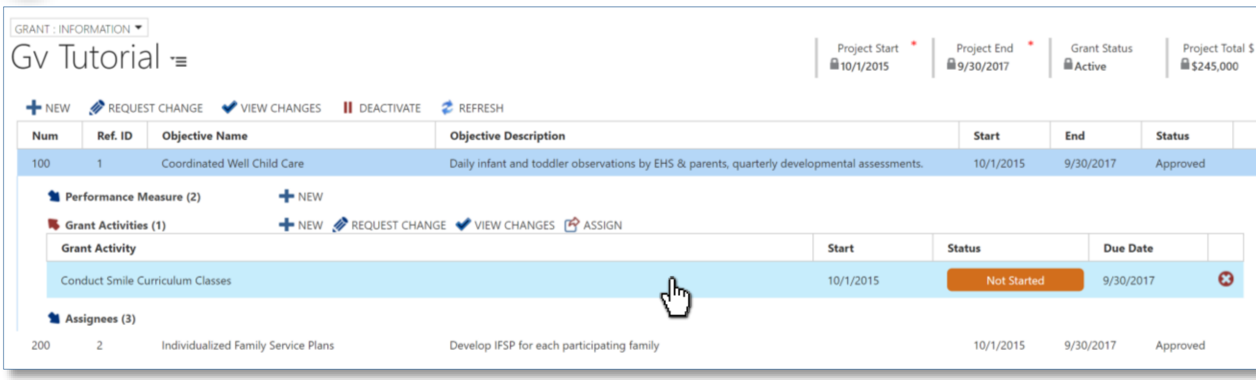
## Sub-Activities

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

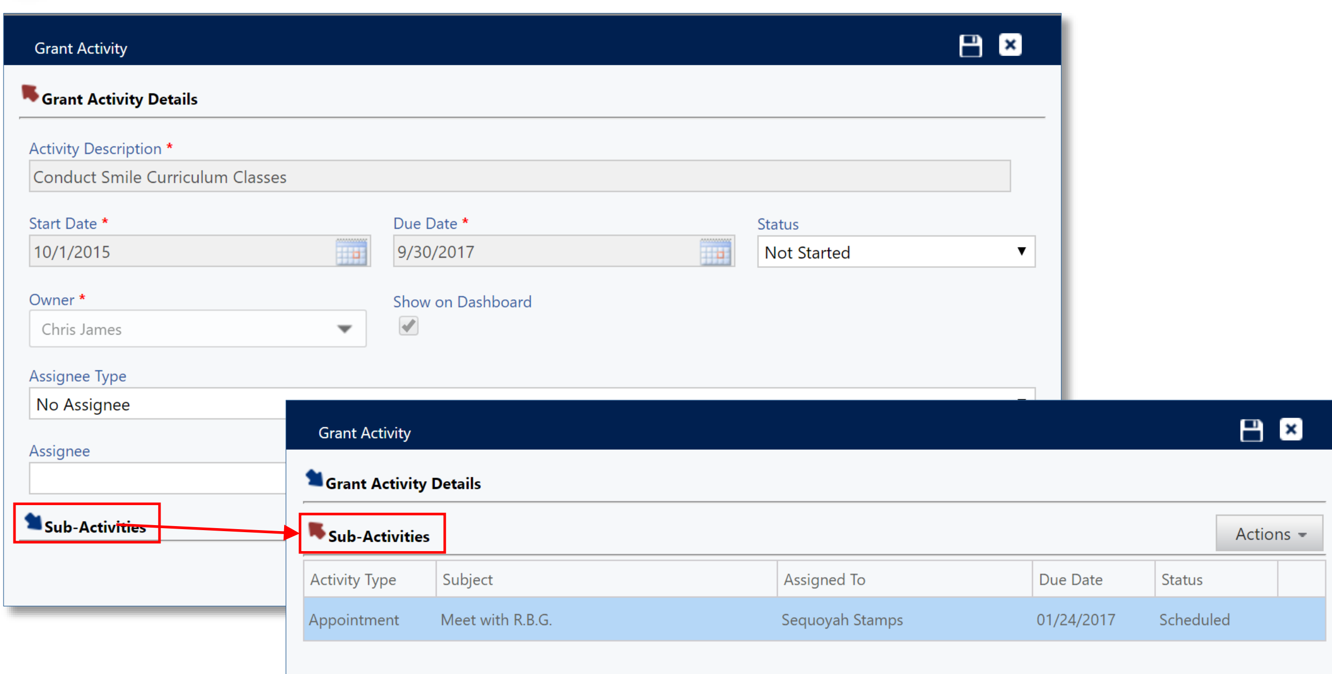
Sub-Activities may be added from within the Dynamic Dashboards, The Objectives Page or by selecting the Quick Create + on the GrantVantage Home Page

**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



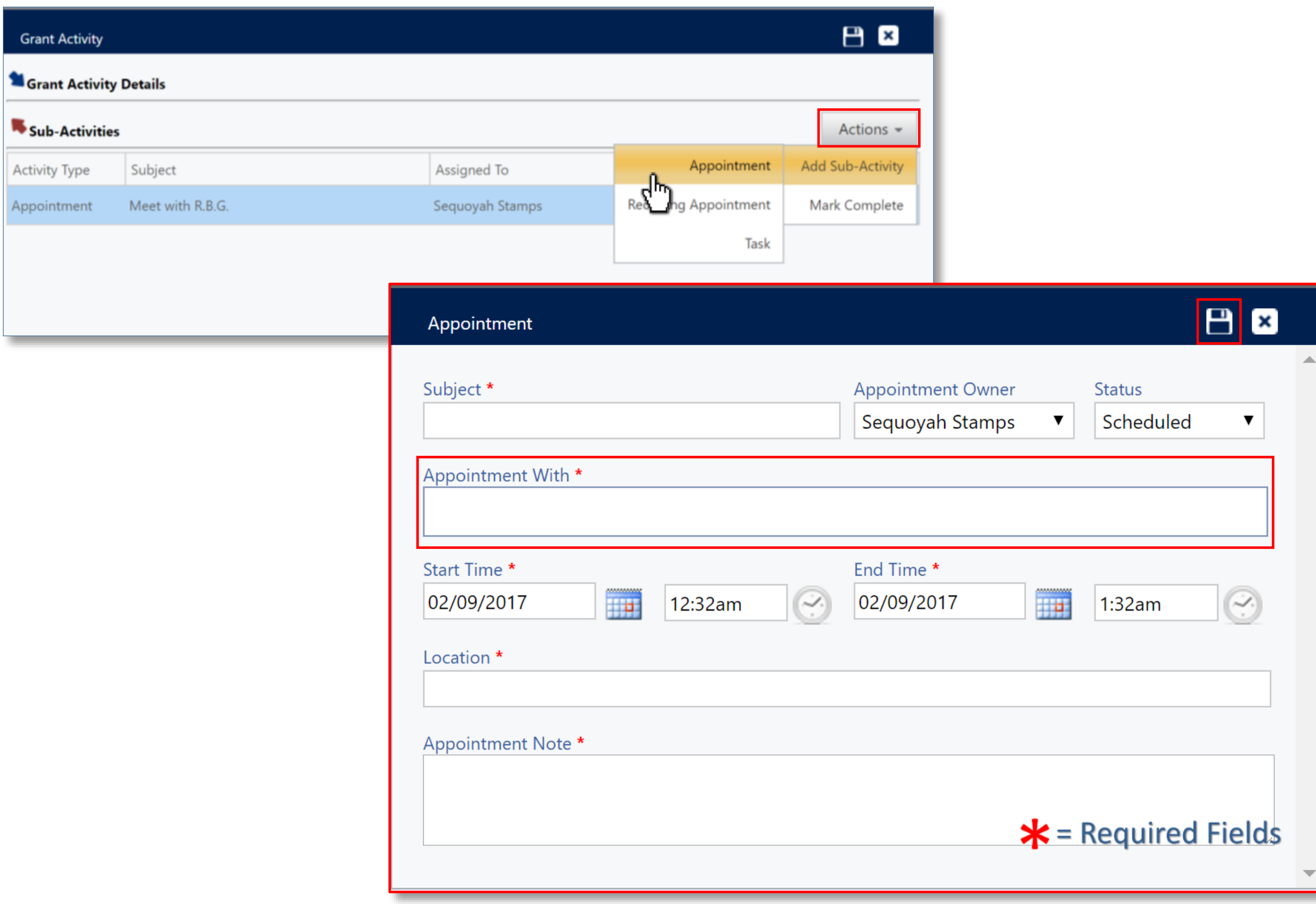

2 At the bottom of the Activity Window expand the Sub-Activities section



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

## Appointment

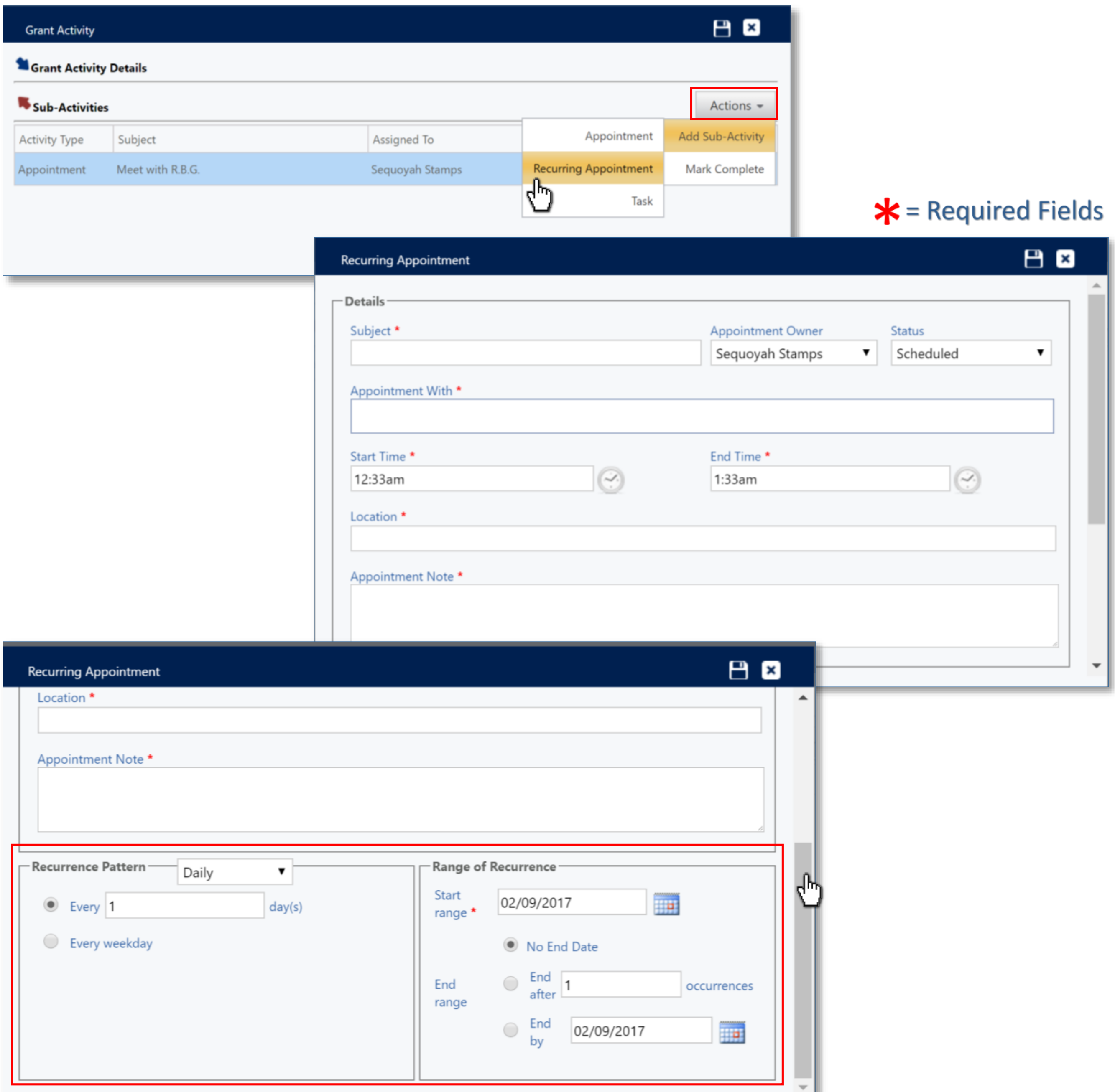
When adding an appointment, an email with a calendar invite will be sent to all contacts entered with a valid email address
Enter the contact name in the **Appointment With** field, enter appointment details, then Save




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

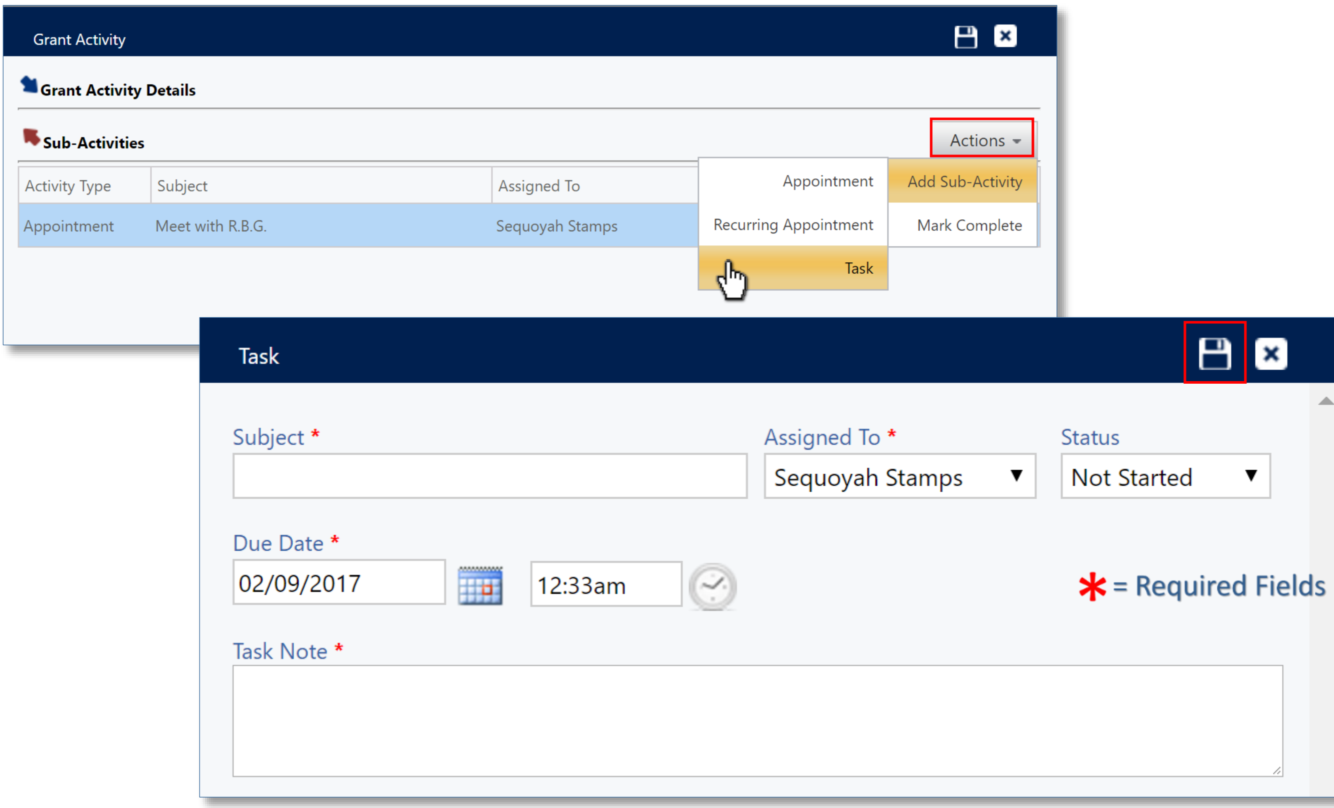
## Recurring Appointment

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

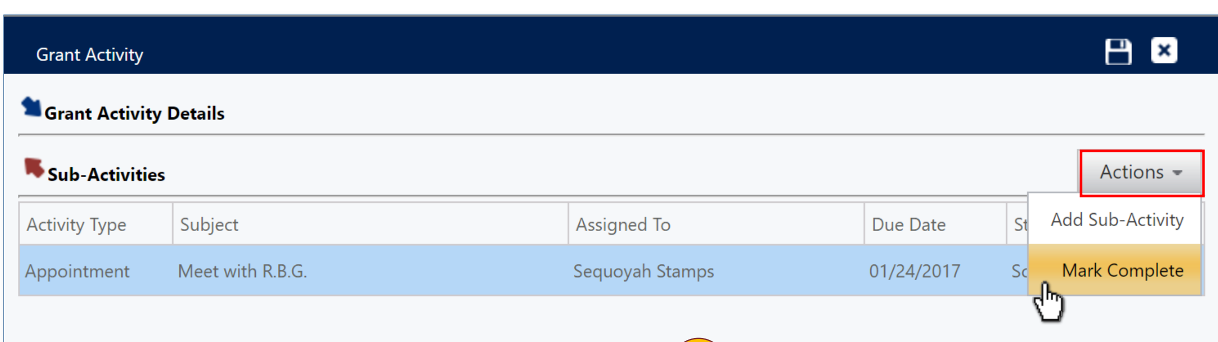


## Task

1. Identify specific actions a user must complete




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

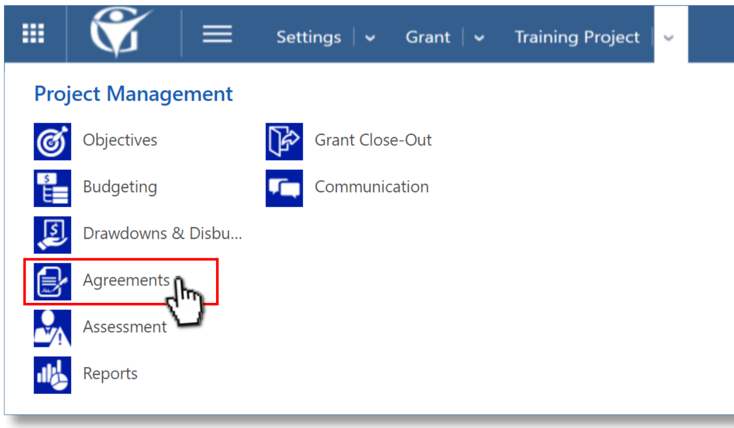


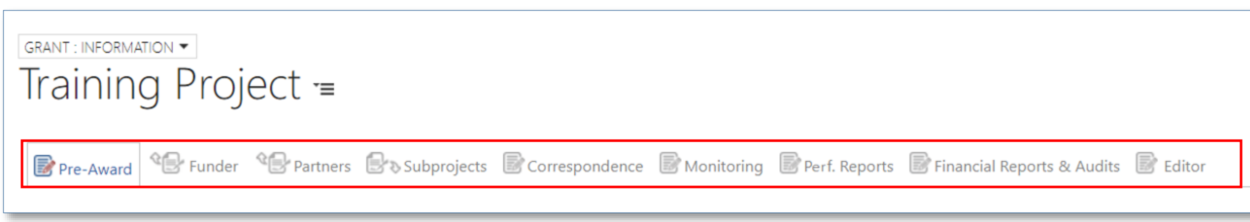

Sub-Activities may be added to *saved* Objective Activities at any time throughout the lifecycle of the Project

## 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

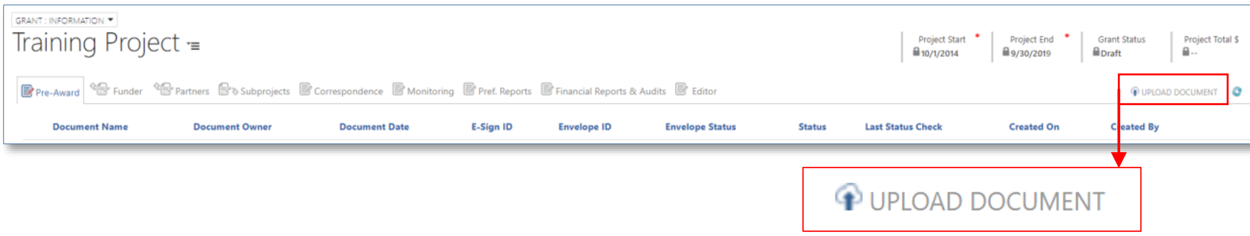


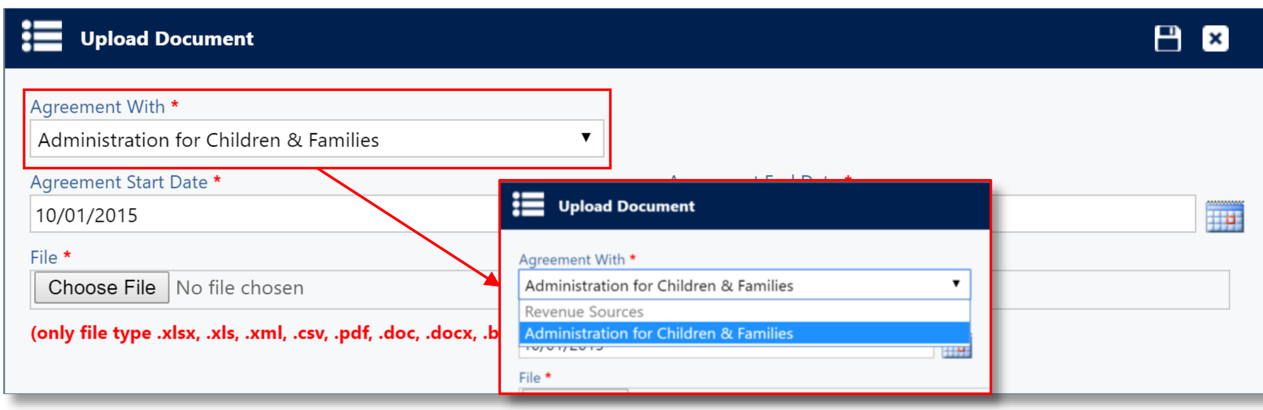

2. To upload a document, select the tab that is most relevant to its content

| | |
|---|---|
| **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 |

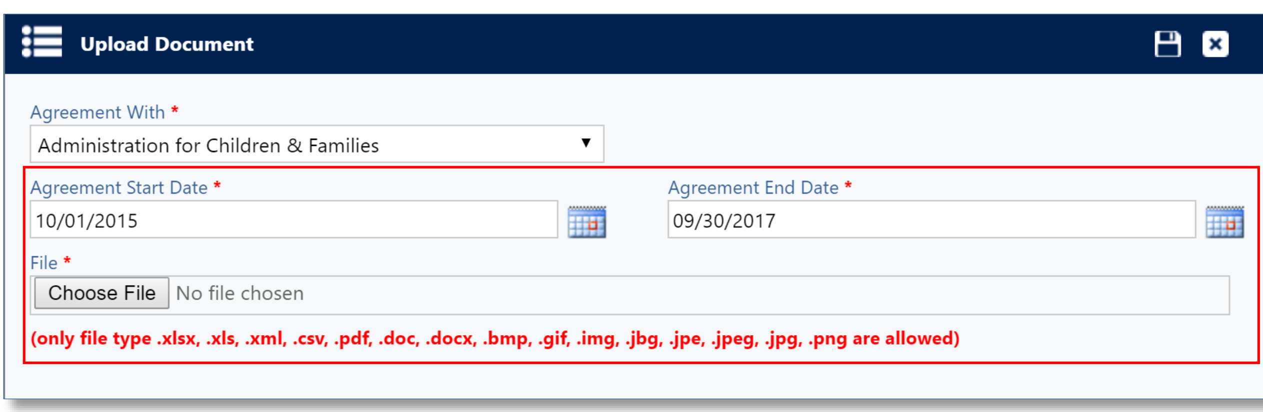
## 3 Select **Upload Document**



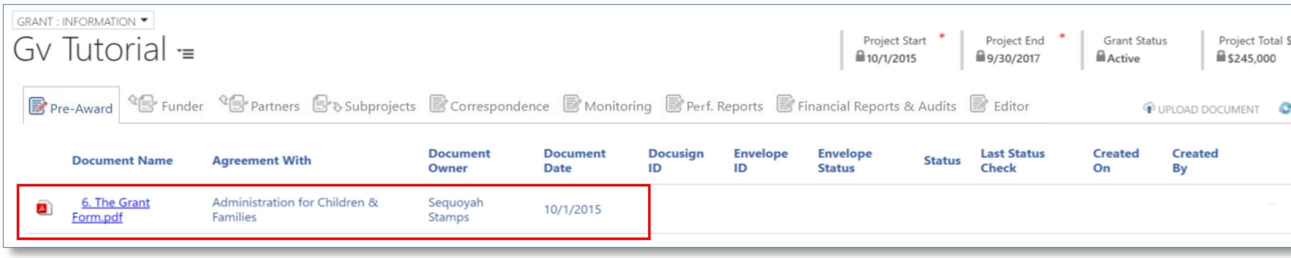

Users may upload any document type as indicated by the **Upload Document** form
Identify the Revenue Source, Partner, or Sub-Project to associate the document with



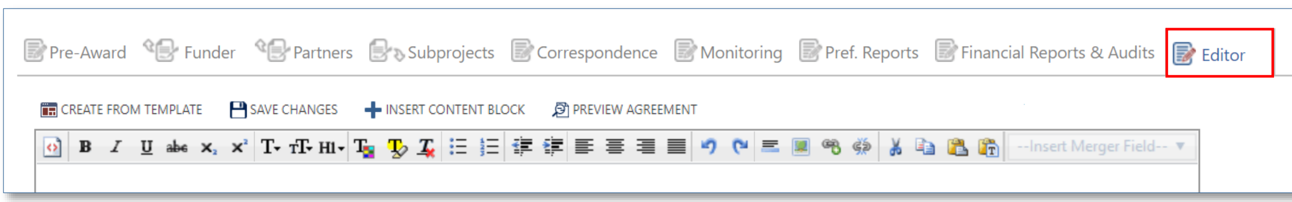

Set the agreement start and end dates
Select Choose File, select the document to upload, and then save



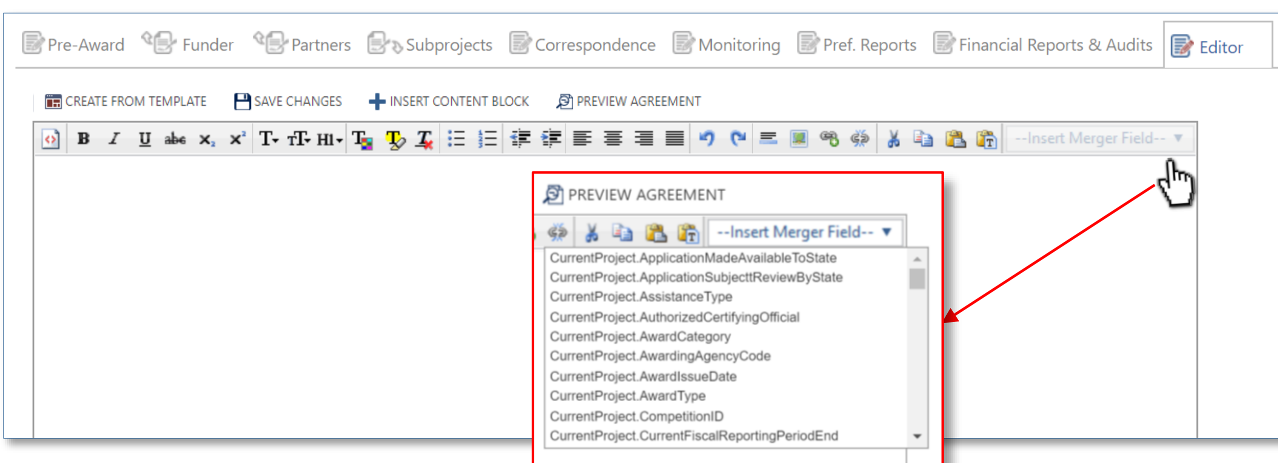
4 Once a document is uploaded, it will appear in the selected tab under **Document Name**




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



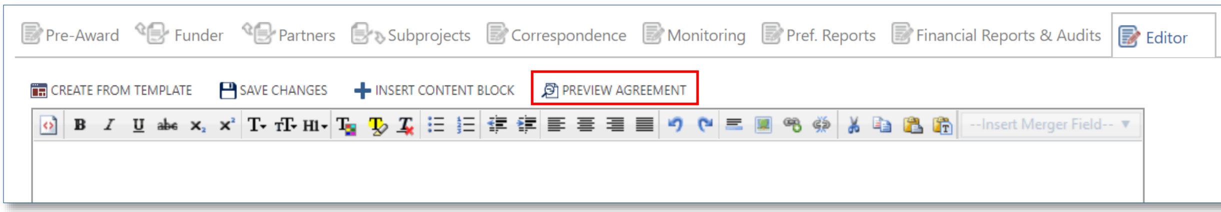

Users may write and format project documents with this tool, similarly to composing an email
Use the **Formatting Toolbar** to customize agreements and other documents
Users may add images, copy and paste text, size and color fonts, create bulleted or numbered lists using this feature




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

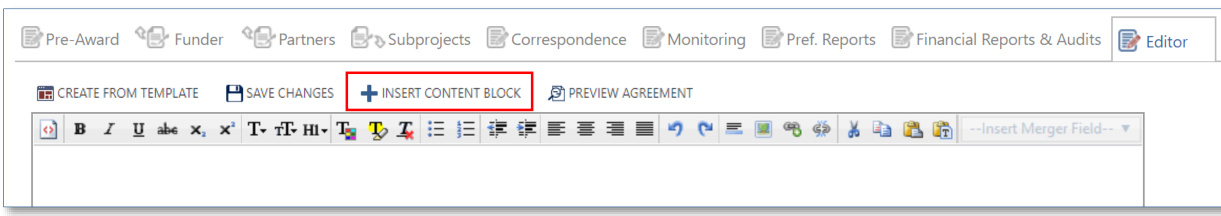
This feature will also indicate how the document will appear once the **Merge Field** data is populated from your GrantVantage projects




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

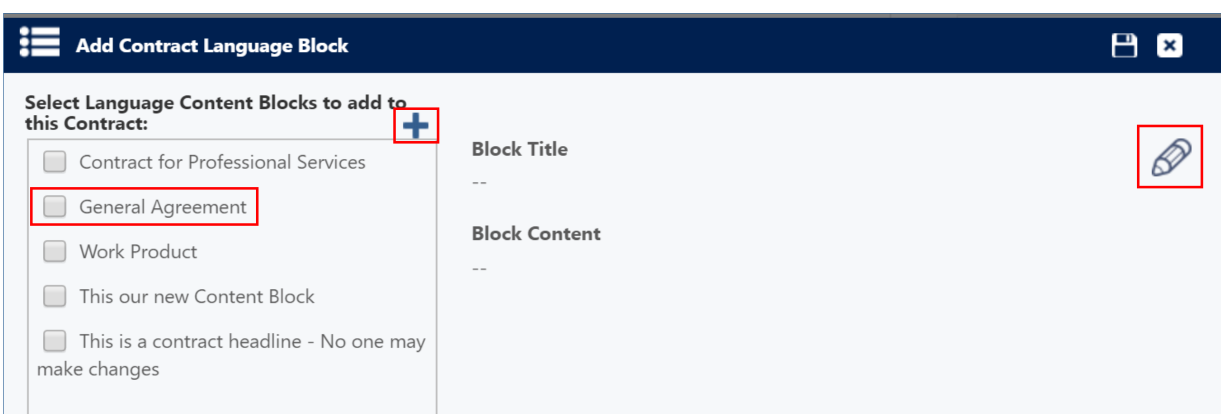
Select **+ Insert Content Block** to add then the plus sign to create a new content block

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

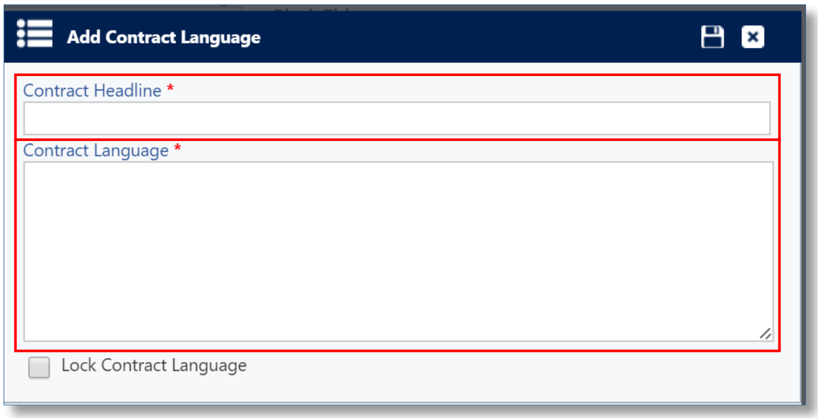



To add a new content block select the + button

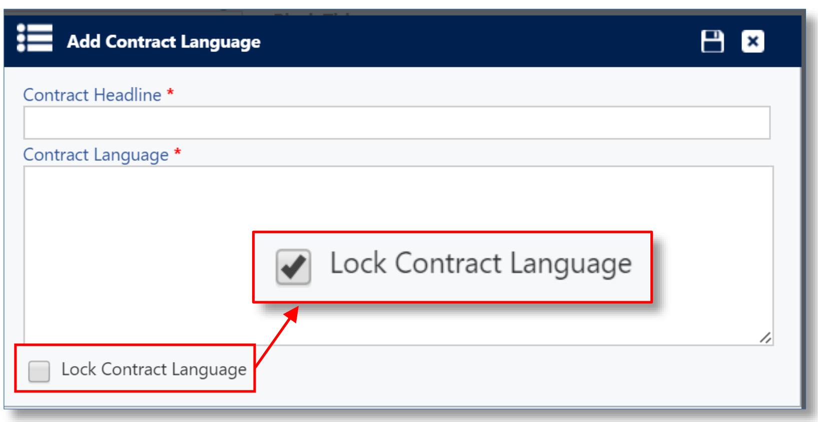
To edit an existing content block, select it, then select the button



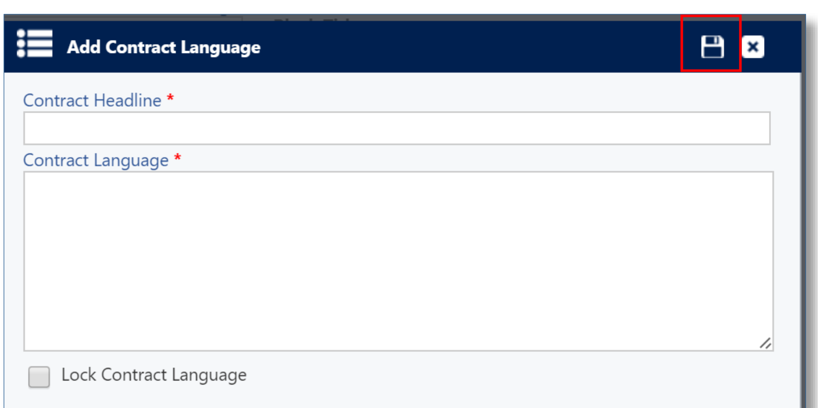
8 When adding contract language, enter a **Contract Headline** and the text you wish to appear beneath the heading in the **Contract Language** section




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

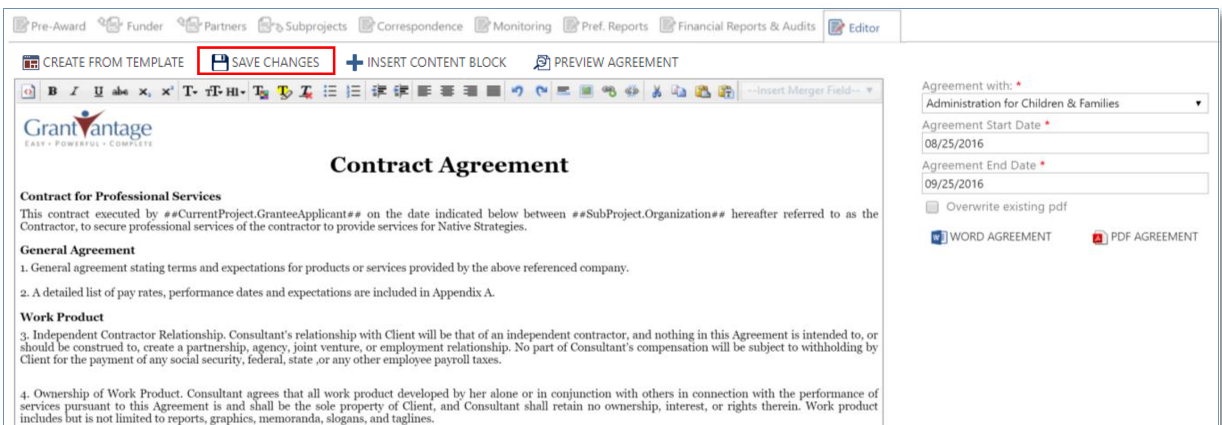



Select save when all block contract language is complete

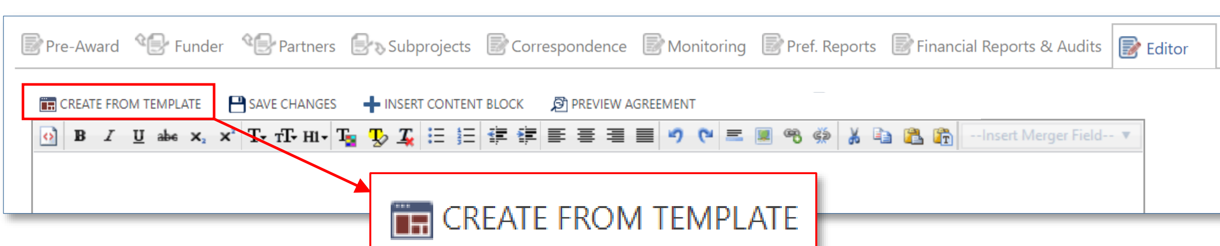


**9** Select one or more content blocks in order to add them to an agreement or document, then select **Save**


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

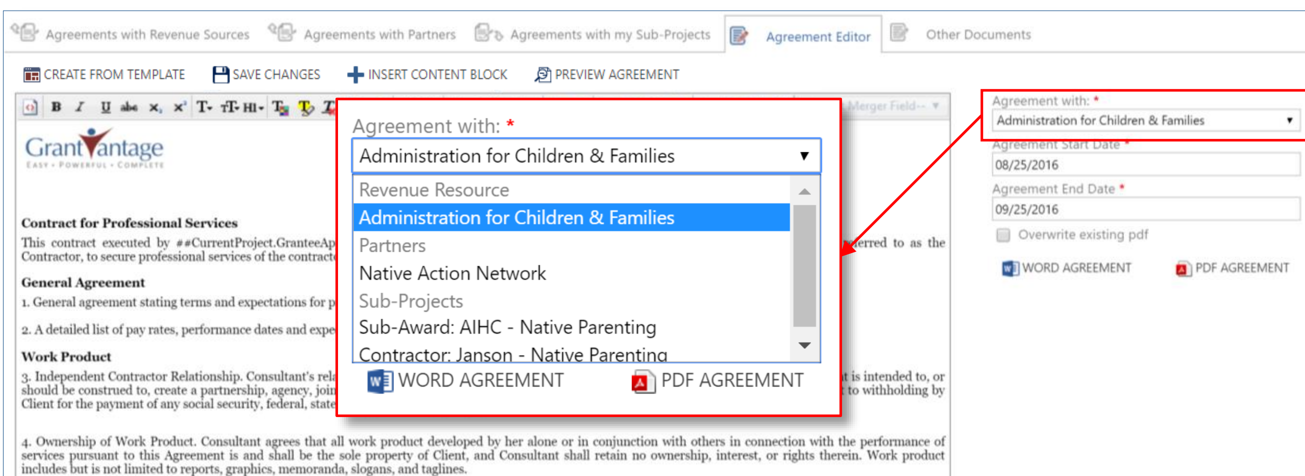



**11** To access a saved template, select **Create From Template** from the **Agreement Editor** tab



**12** Select desired template then select **Save**

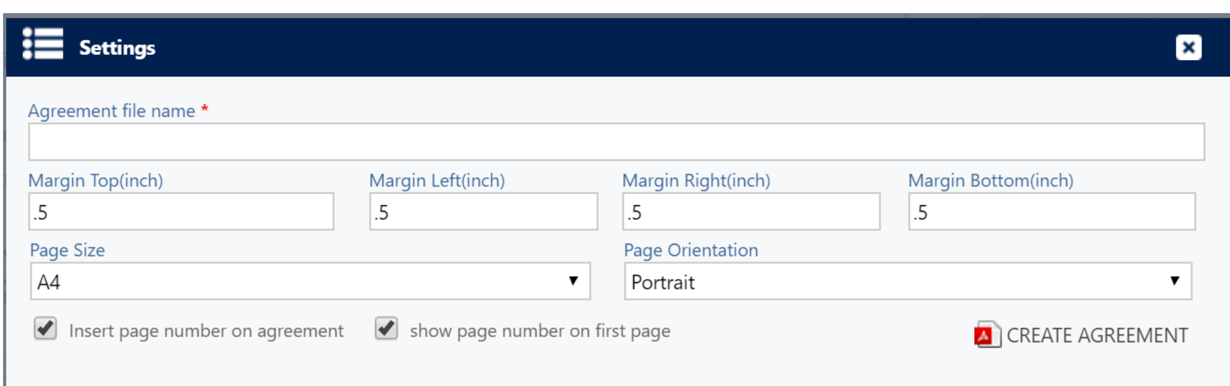

**13** When an agreement or document is complete, ready for export or to be passed on to its intended parties, select the Revenue Source, Partner, or Sub-Project for whom it is intended



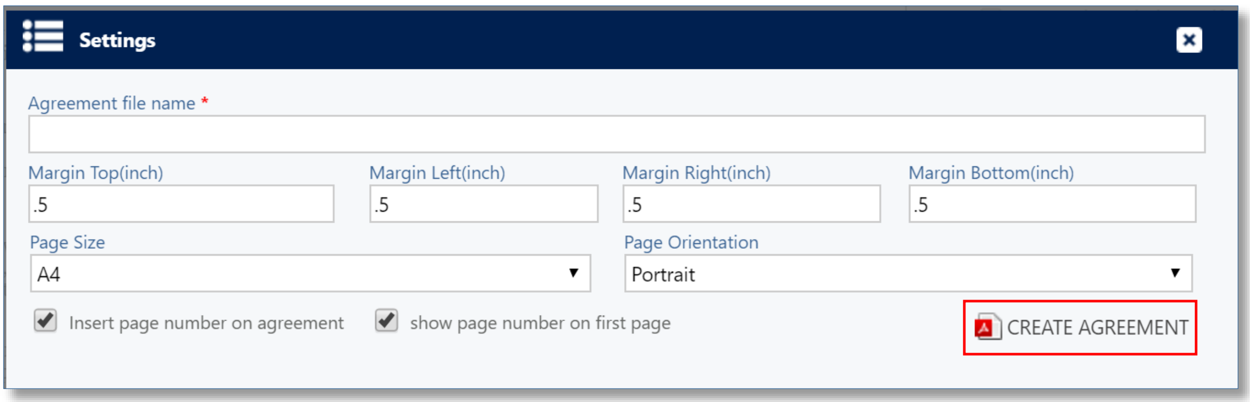
**14** Select the Agreement Start and End Dates and whether or not to overwrite a previous existing document with the selected organization by selecting Overwrite Existing PDF


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



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.)

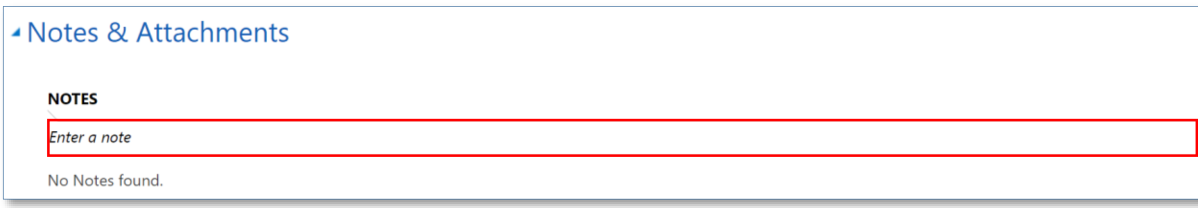


## Notes & Attachments

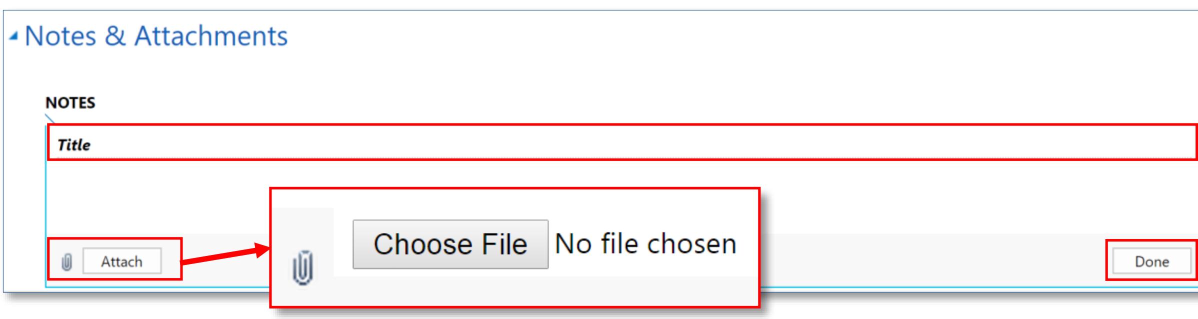
The Notes & attachments section appears in All Project Forms and nearly every information form or record in GrantVantage.

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

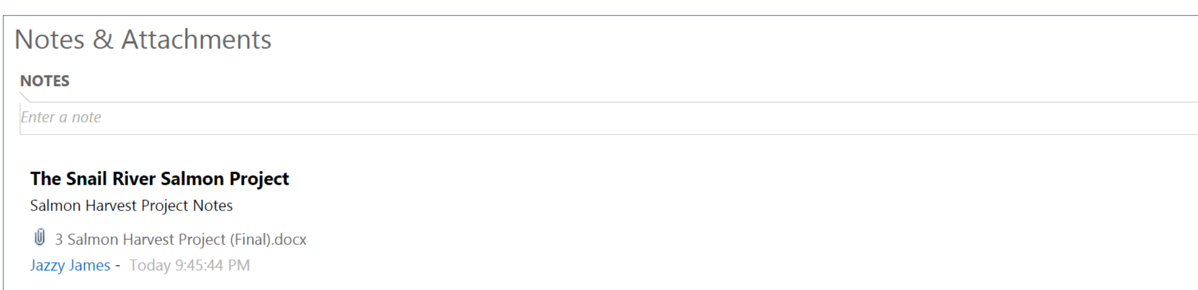
1. To add Notes & Attachments, anywhere you see this section simply begin by typing into the ***Enter a note*** field.




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




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

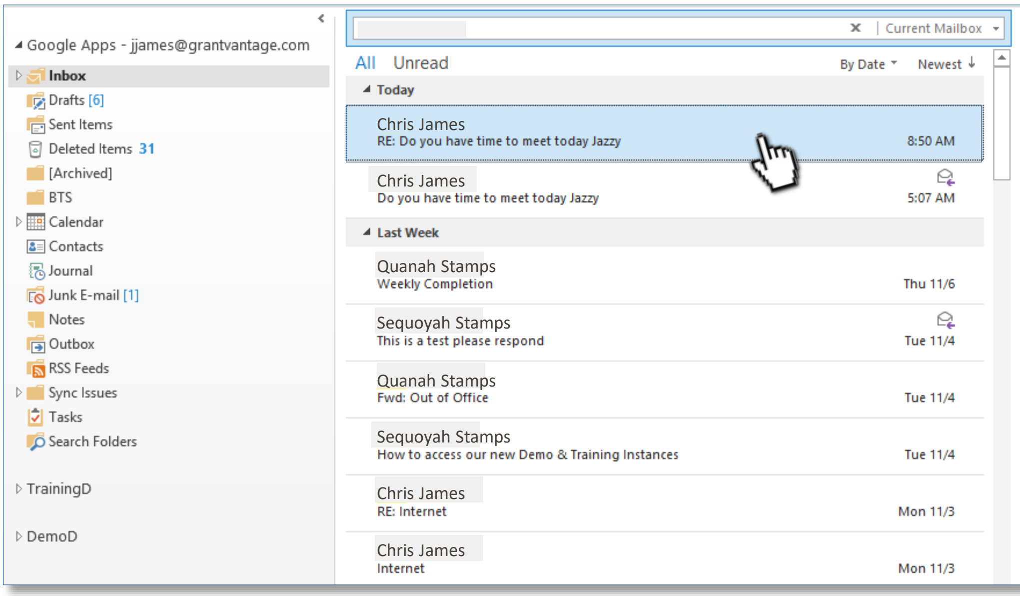


## Email Tracking

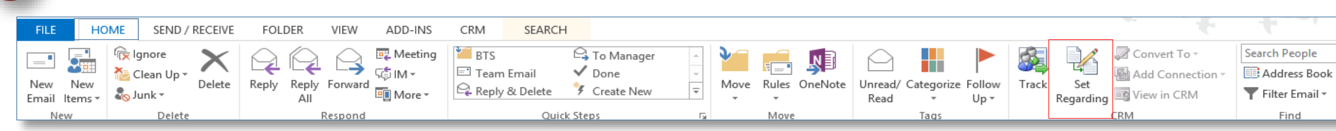
Learn how to track emails in GrantVantage Through Outlook
GrantVantage enables users to track emails and link them to specific Projects and Contacts within GrantVantage

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

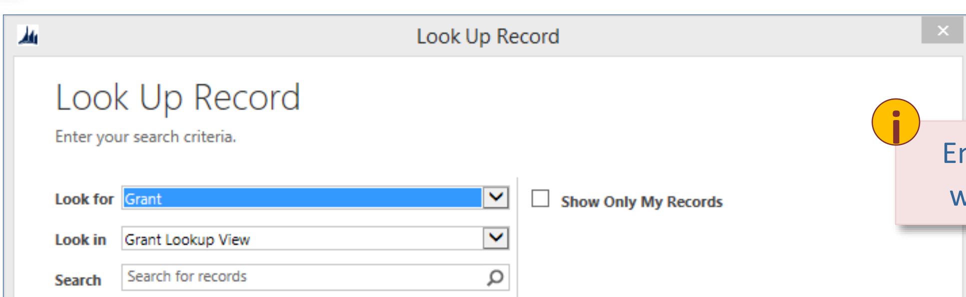
1 To track an email within Microsoft Outlook and link it to a specific project form, Select the email you wish to track from Outlook




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

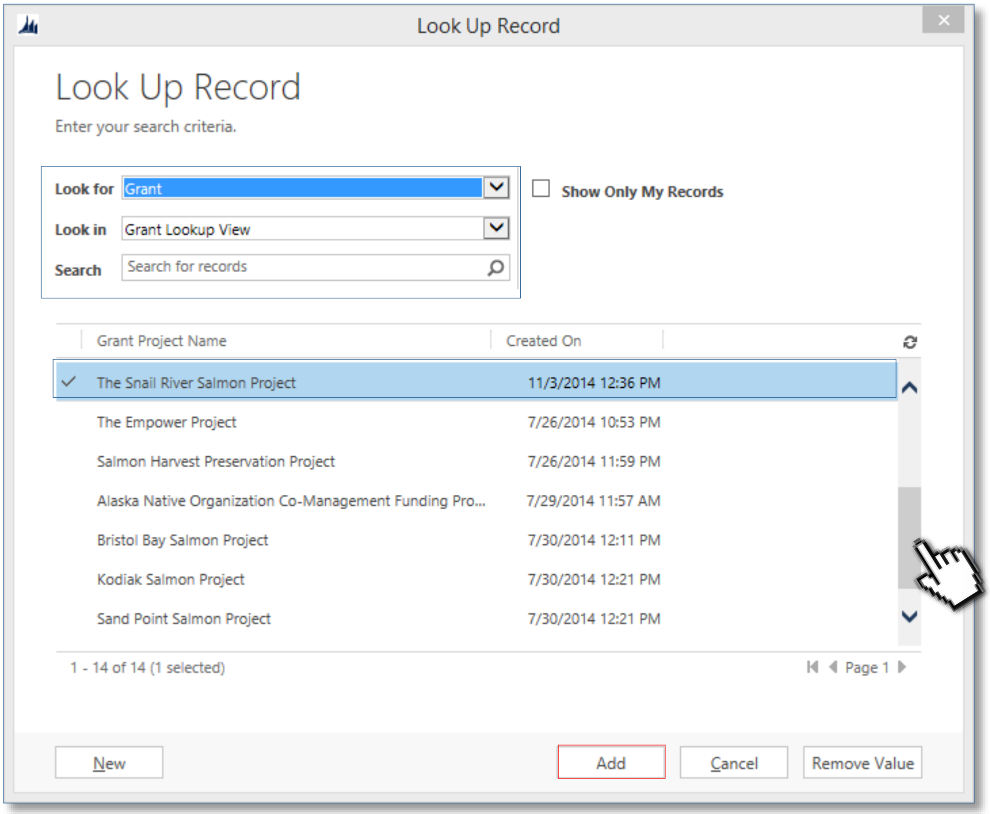



3 After selecting **Set Regarding**, the **Record Look Up Window** will appear

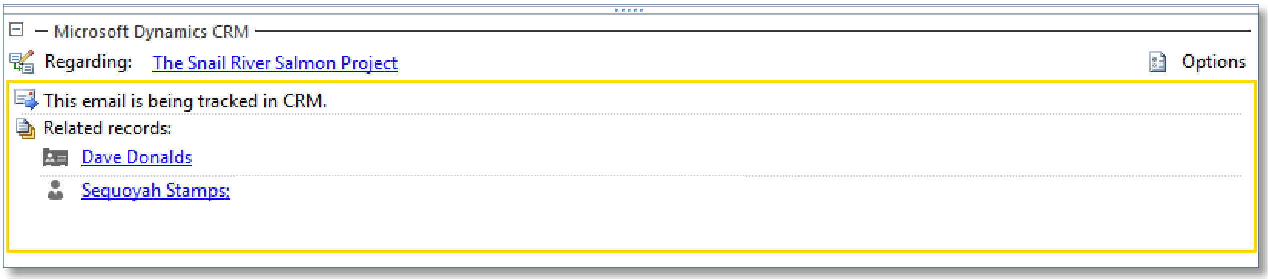


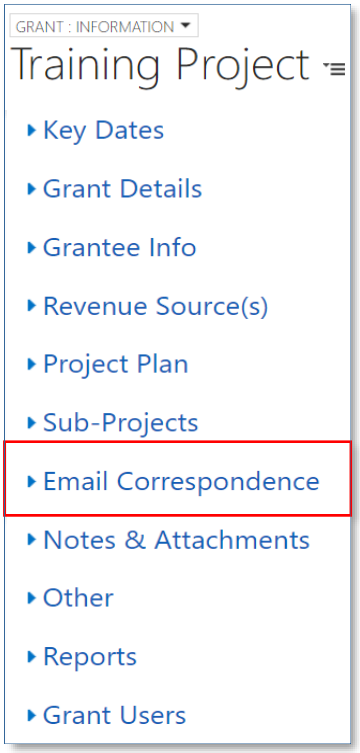

Emails cannot be associated with more than one record

- 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**



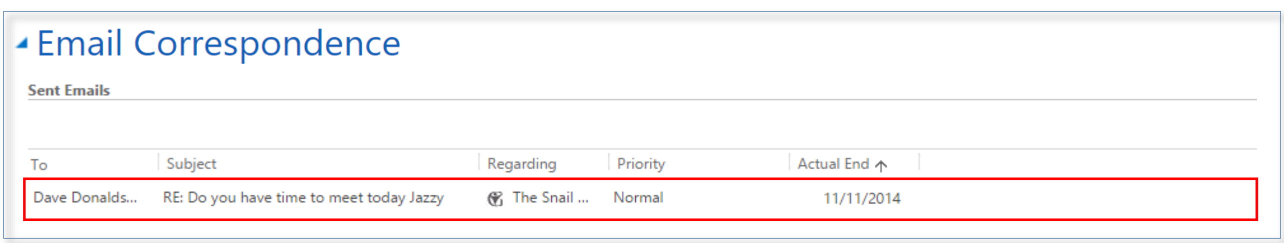

Once added, the record will appear at the bottom of the email






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



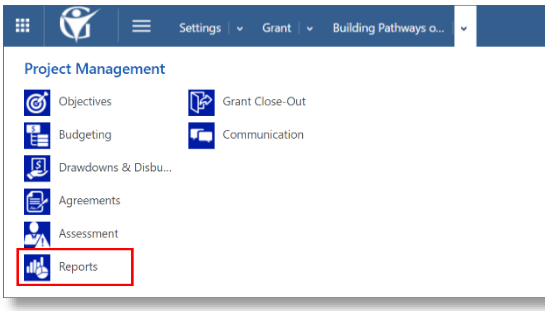
Email Correspondence

Sent Emails

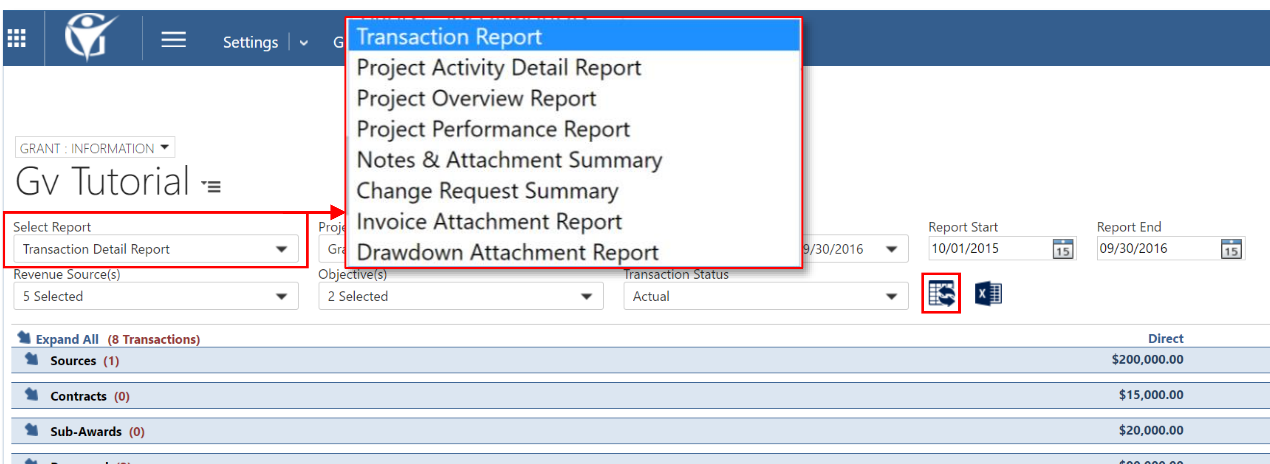
| To | Subject | Regarding | Priority | Actual End |
|---|---|---|---|---|
| Dave Donalds... | RE: Do you have time to meet today Jazzy | The Snail ... | Normal | 11/11/2014 |

## View Project Reports

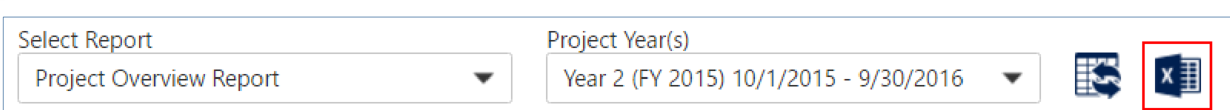
1. In the **Project Management Menu,** select **Reports** to open the Reporting Page




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



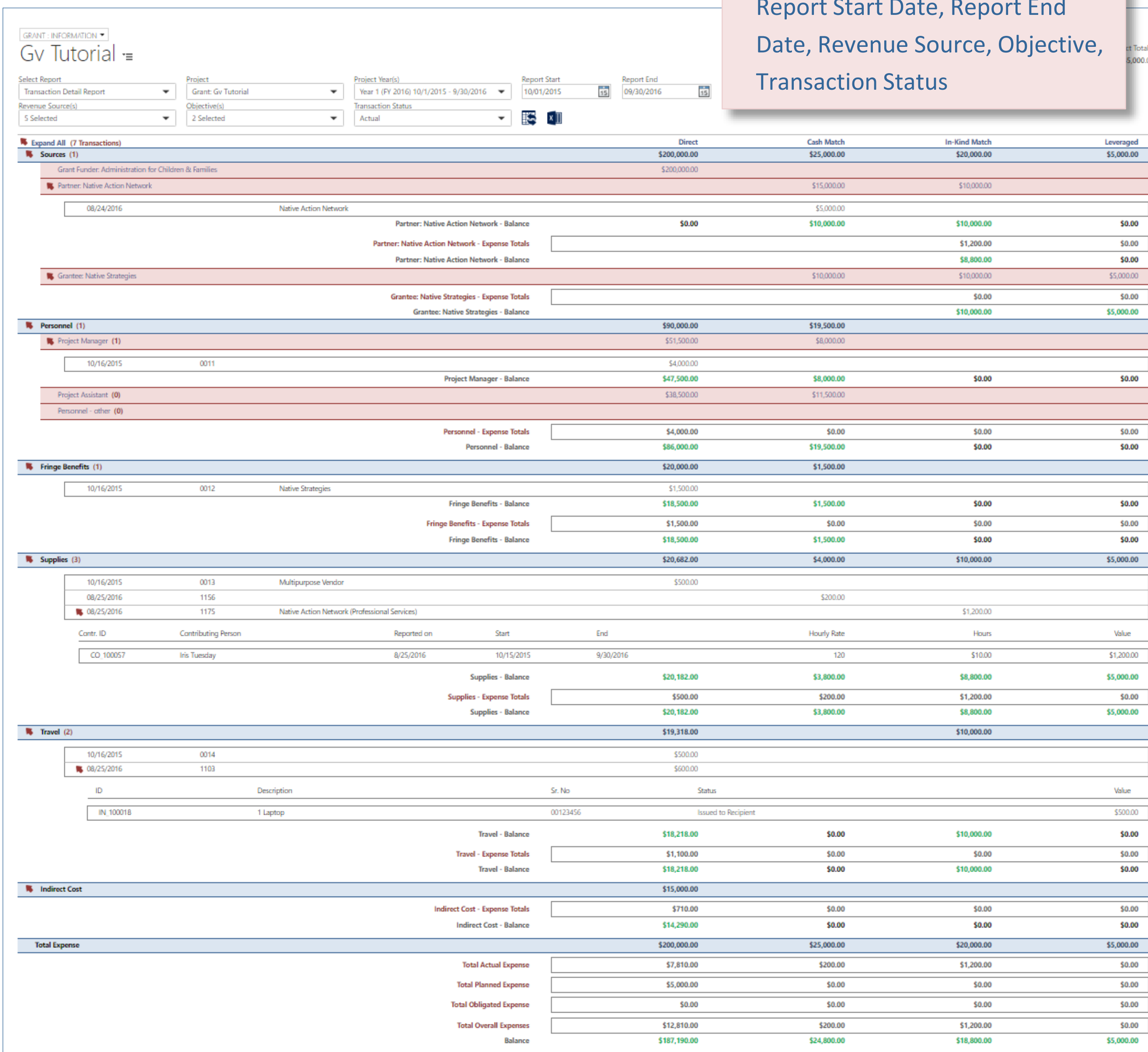

3. Any Report may be **exported to MS Excel** by selecting




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



## **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

GrantVantage EASY • POWERFUL • COMPLETE

## Project Activity Detail Report

### Project: Gv Tutorial

***Project Manager:*** Sequoyah King

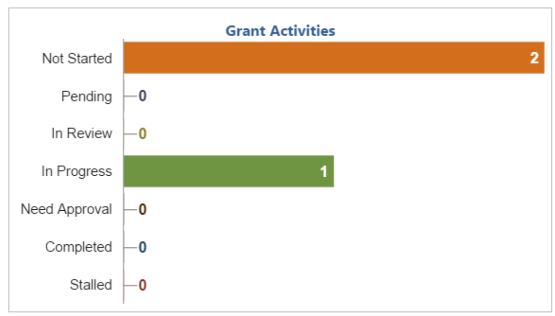
***Award No.:*** ABC123

***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




***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

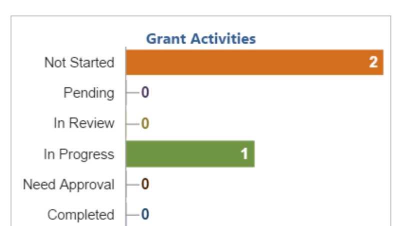
***Owner:*** Chris James

***Grant Activity 2:*** Conduct Smile Curriculum Classes

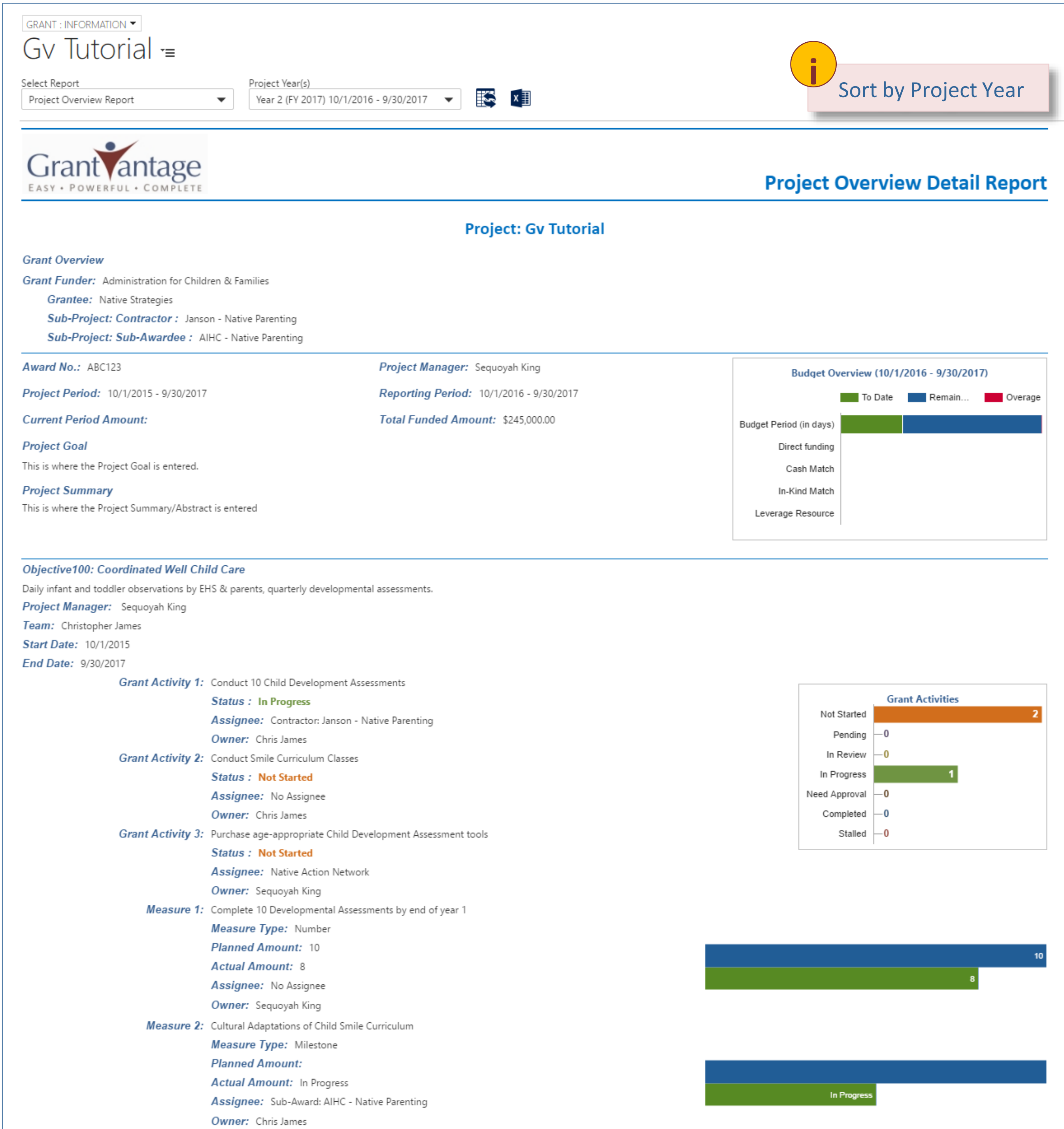
***Status:*** **Not Started**

***Assignee:*** No Assignee

***Owner:*** Chris James



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



## **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

GrantVantage
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

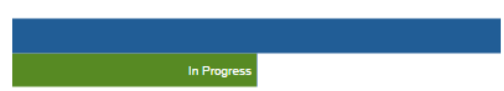
***Project Goal***
This is where the Project Goal is entered.

***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

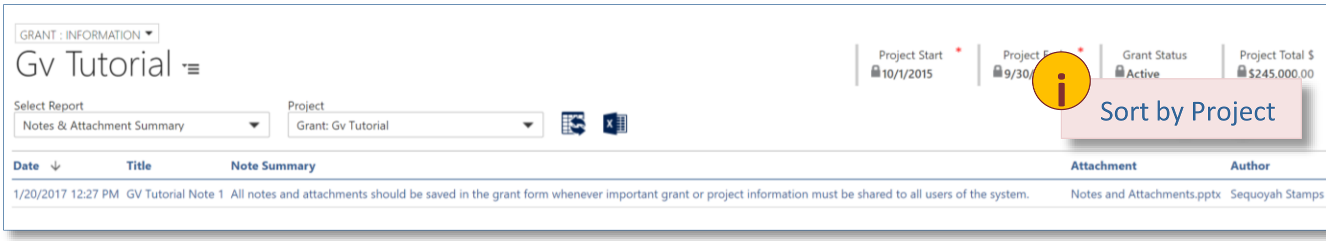

***Measure 2:*** Cultural Adaptations of Child Smile Curriculum
***Measure Type:*** Milestone
***Planned Amount:***
***Actual Amount:*** In Progress
***Assignee:*** Sub-Award: AIHC - Native Parenting
***Owner:*** Chris James




***Measure 3:*** Increase Participation by 50%
***Measure Type:*** Number
***Planned Amount:*** 50
***Actual Amount:*** 0
***Assignee:*** No Assignee
***Owner:*** Sequoyah King

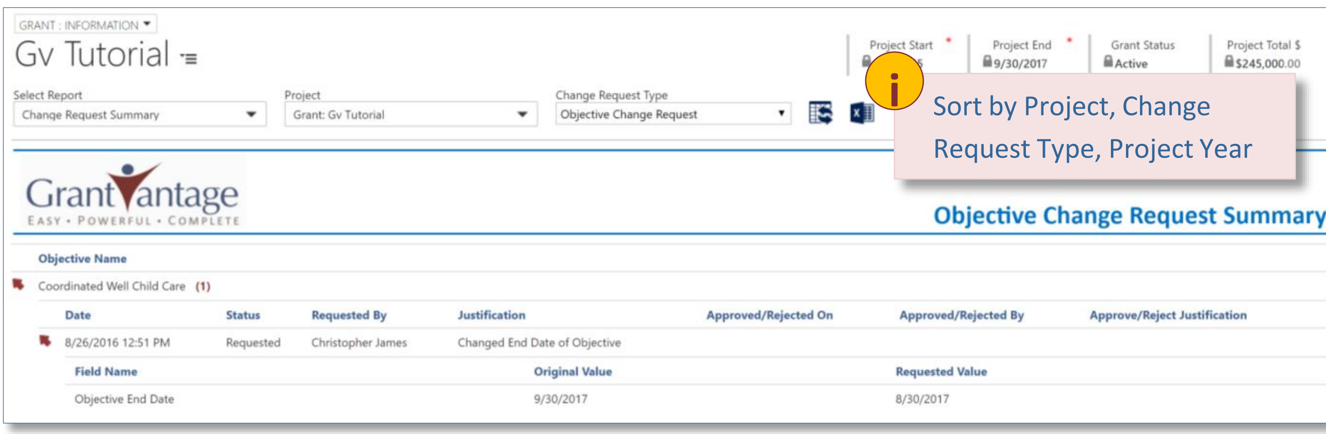
## Notes & Attachments Summary:

Library of Notes and Attachments posted to the Project Form



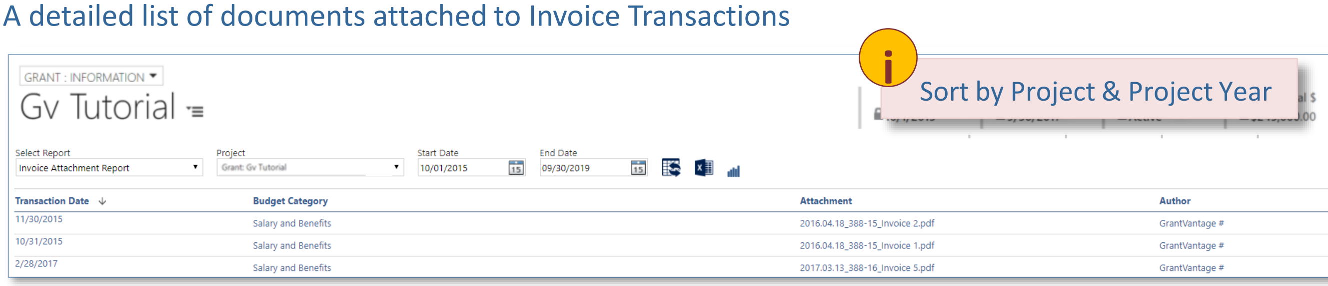

## Change Request Summary:

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



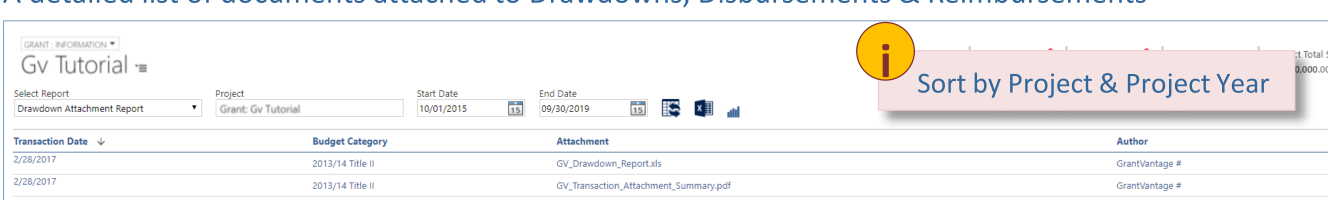

## Invoice Attachment Report:

A detailed list of documents attached to Invoice Transactions



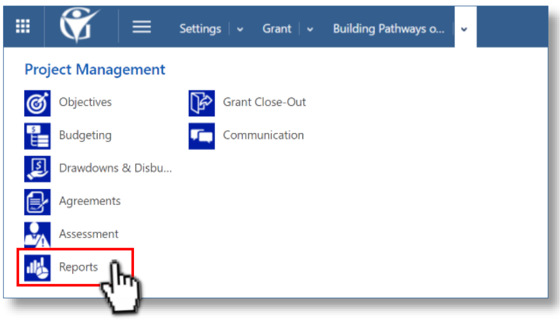

## Drawdown Attachment Report:

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

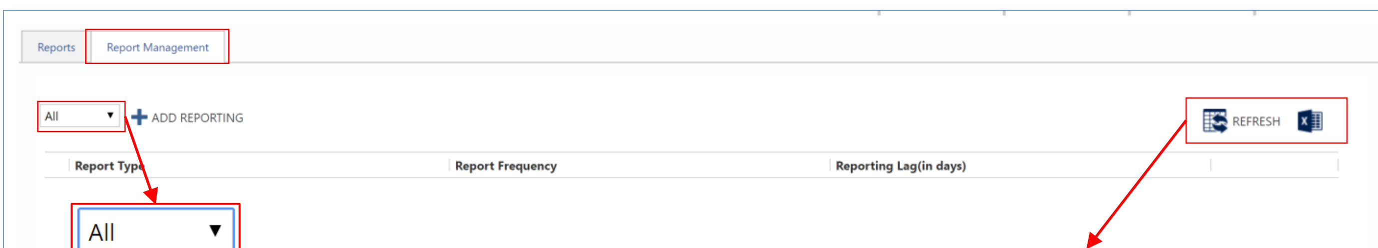


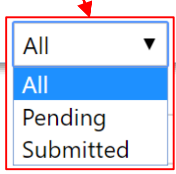
## Report Management

**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

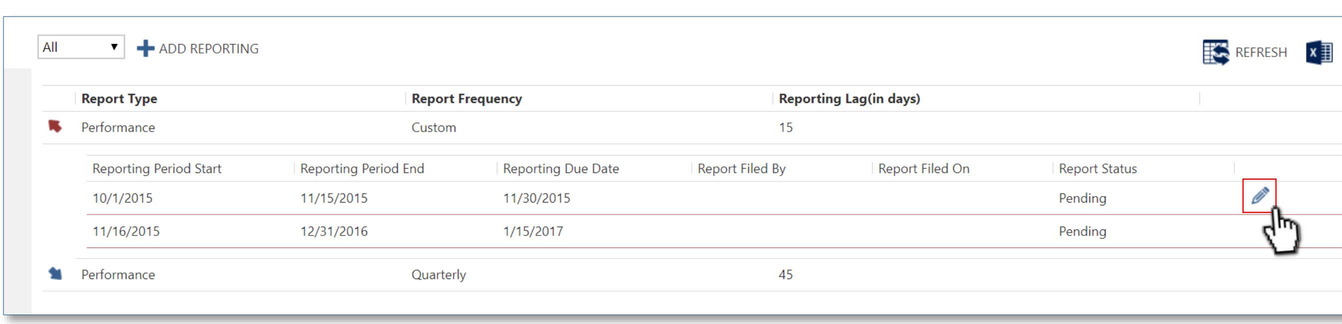



REFRESH Refresh table to load most recent changes

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



Update Report information as needed, then select Save