GrantVantage®

Applicant Instructions

Table of Contents

Register an Applicant Profile

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

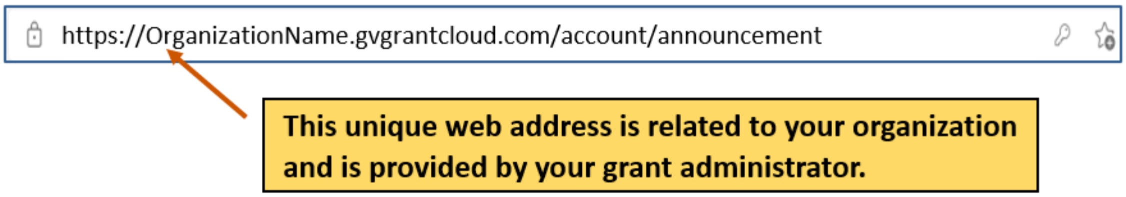


Figure 1: GrantVantage URL

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

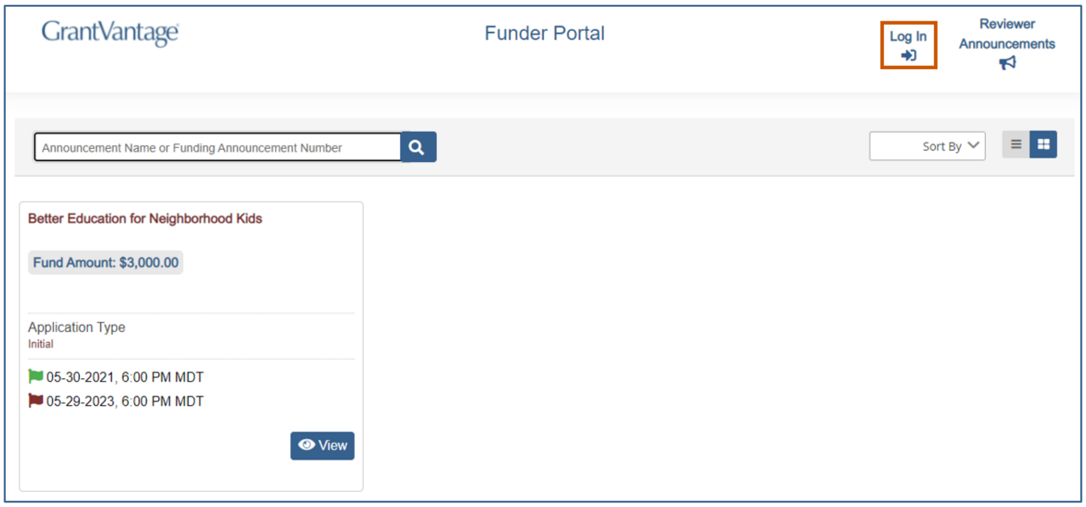


Figure 2: Public Facing Page

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

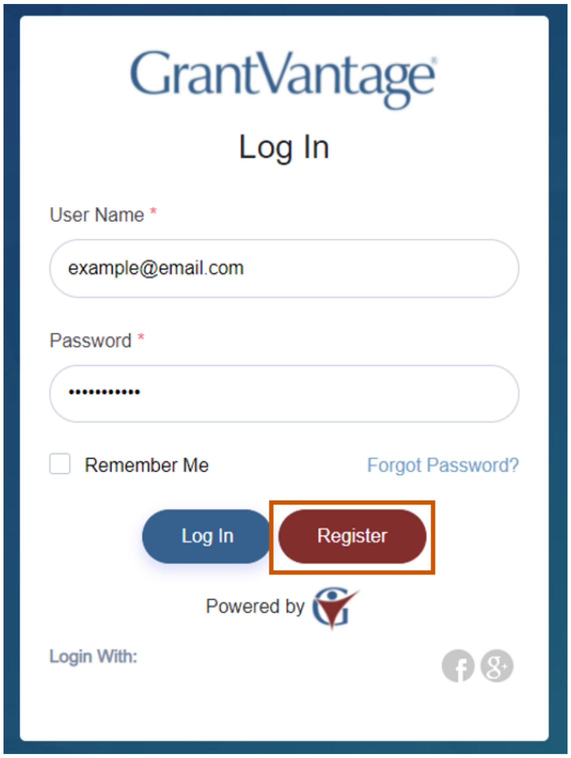


Figure 3: Register Profile

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

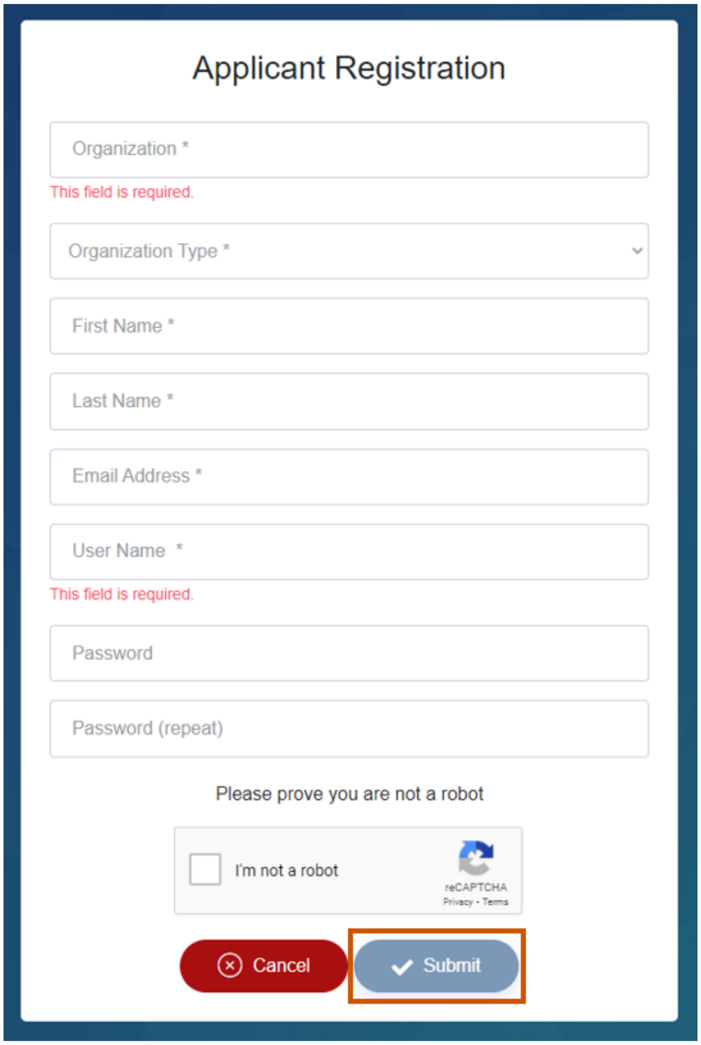


Figure 4: Applicant Registration

Login

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

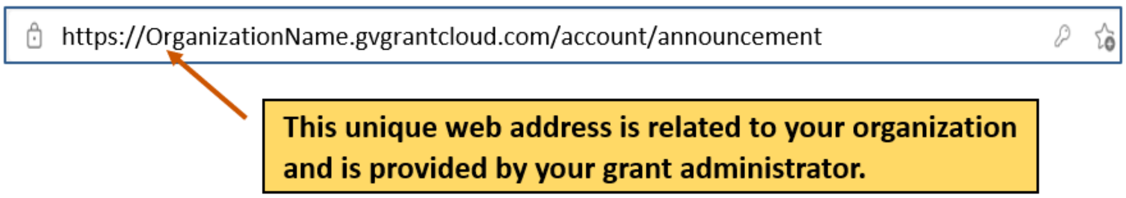


Figure 5: GrantVantage URL

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

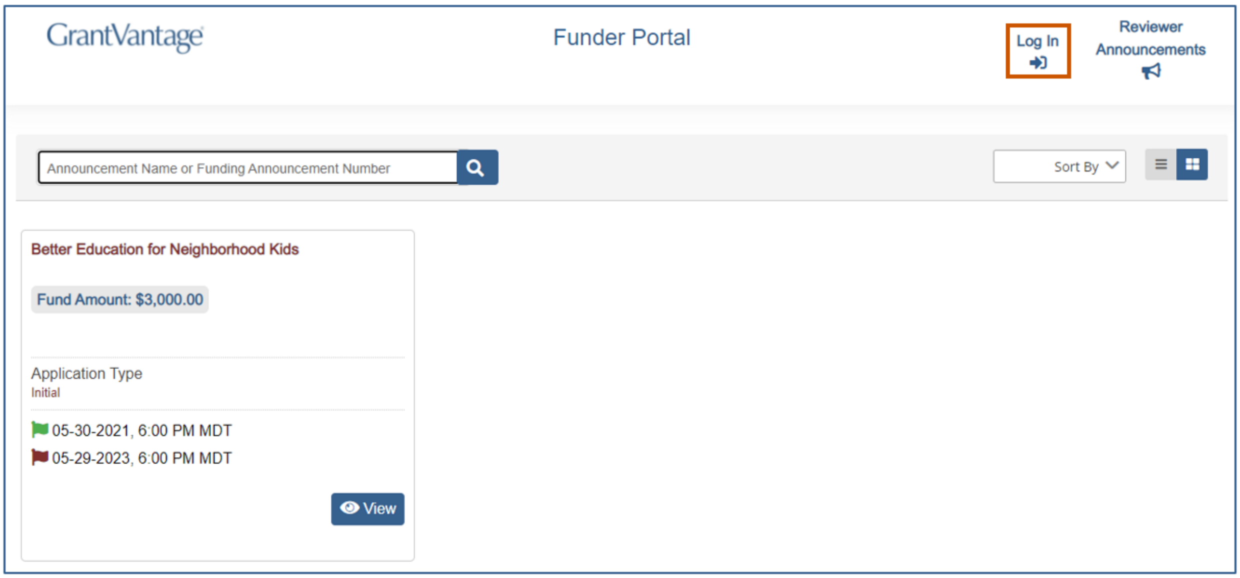


Figure 6: Public Facing Page

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

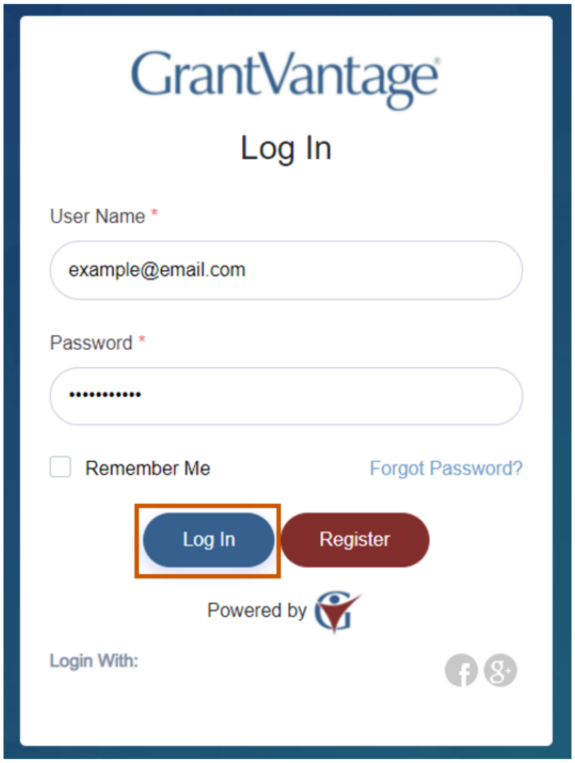


Figure 7: Login Screen

Homepage

On the homepage, you can view all published funding announcement opportunities, opportunities you have applied for, your profile, and view users, properties, and documents related to the application.

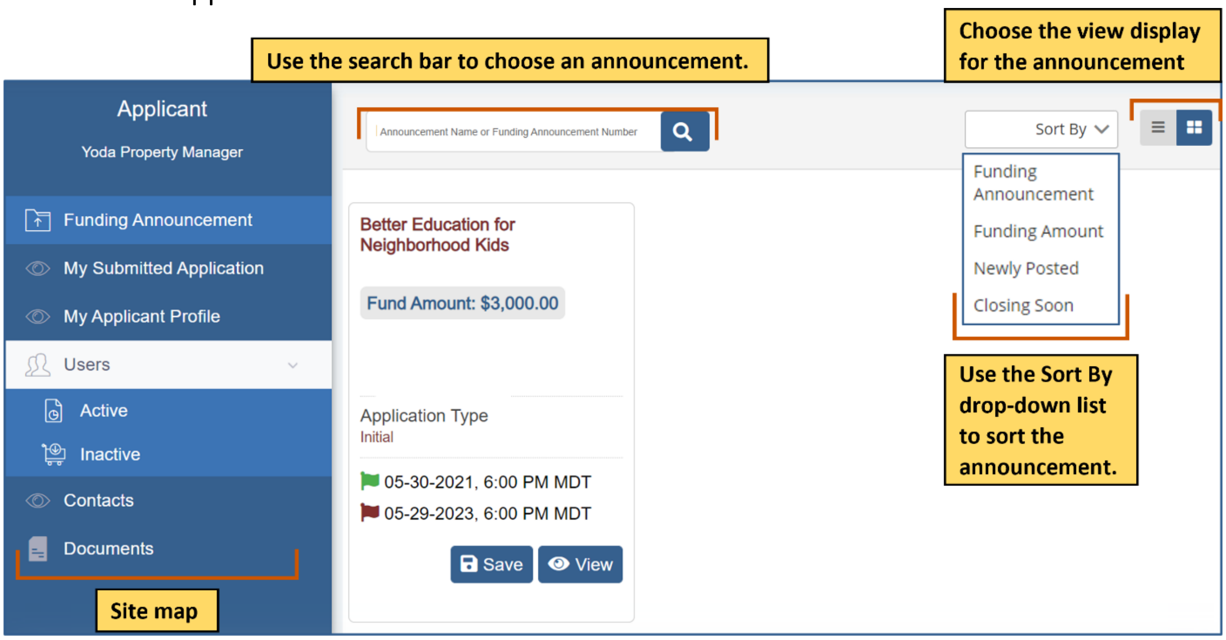


Figure 8: Homepage Screen 1

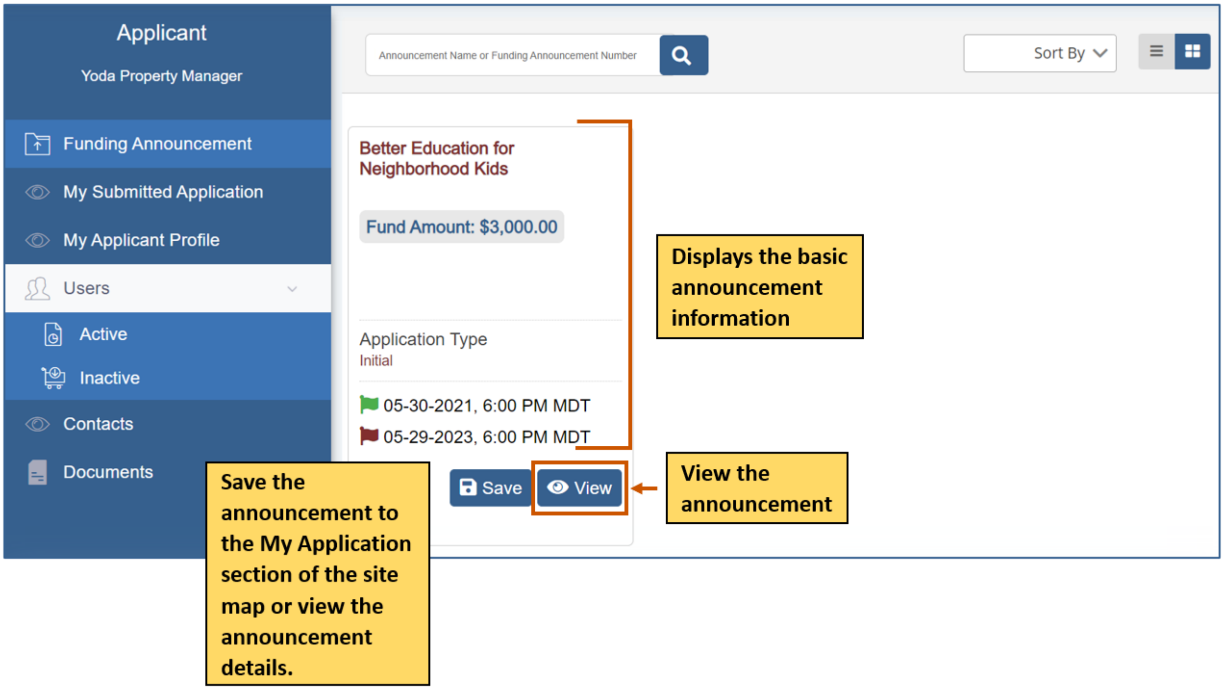
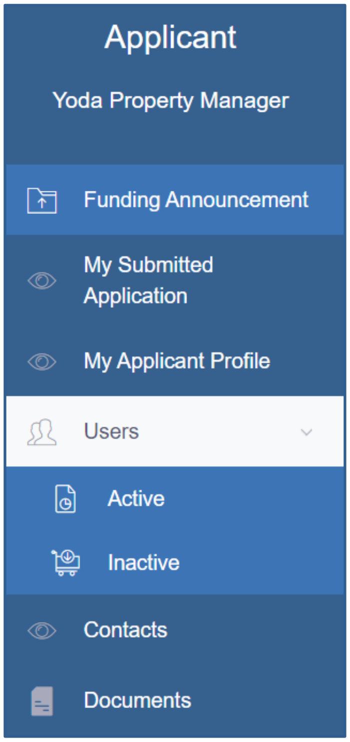


Figure 9: Homepage Screen 2

Site Map

The site map displays navigation options relating to the applicant, such as the applicant profile, the internal users, and the contacts. The Applicant site map links to the Funding Announcement and My Applications pages, which opens the applicant dashboards.



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

Table 1: Site Map

Funding Announcement

You can view announcements you have saved/applied to, your applicant profile, users and contacts associated with the Applicant profile or organization profile, and documents related to the funding announcement or an applicant document library that houses documents submitted with an application.

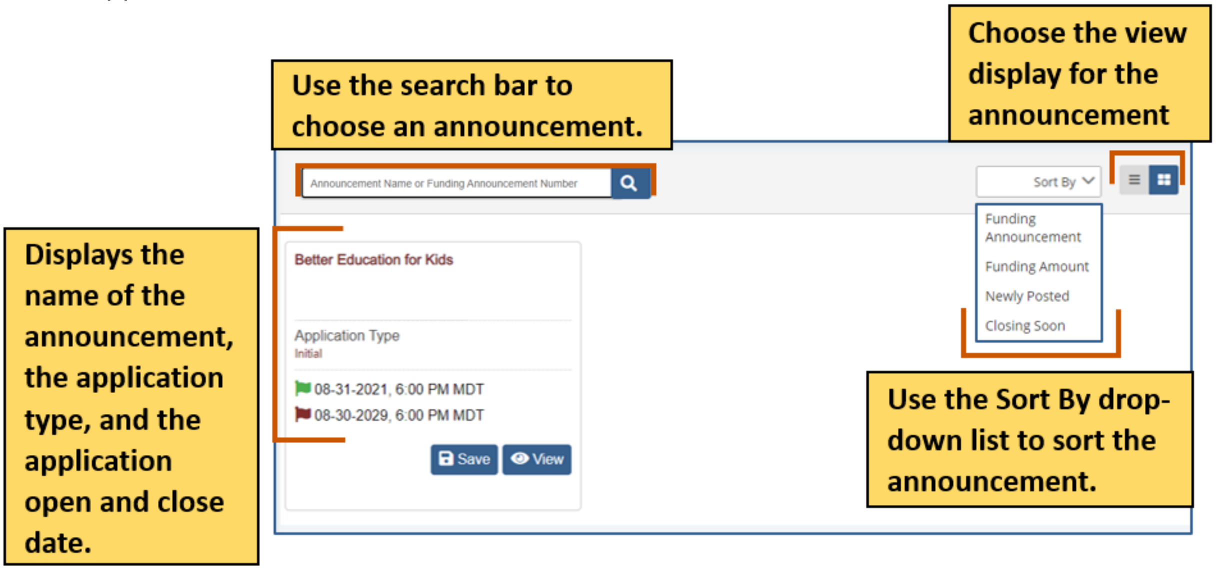


Figure 10: Funding Announcement Screen 1

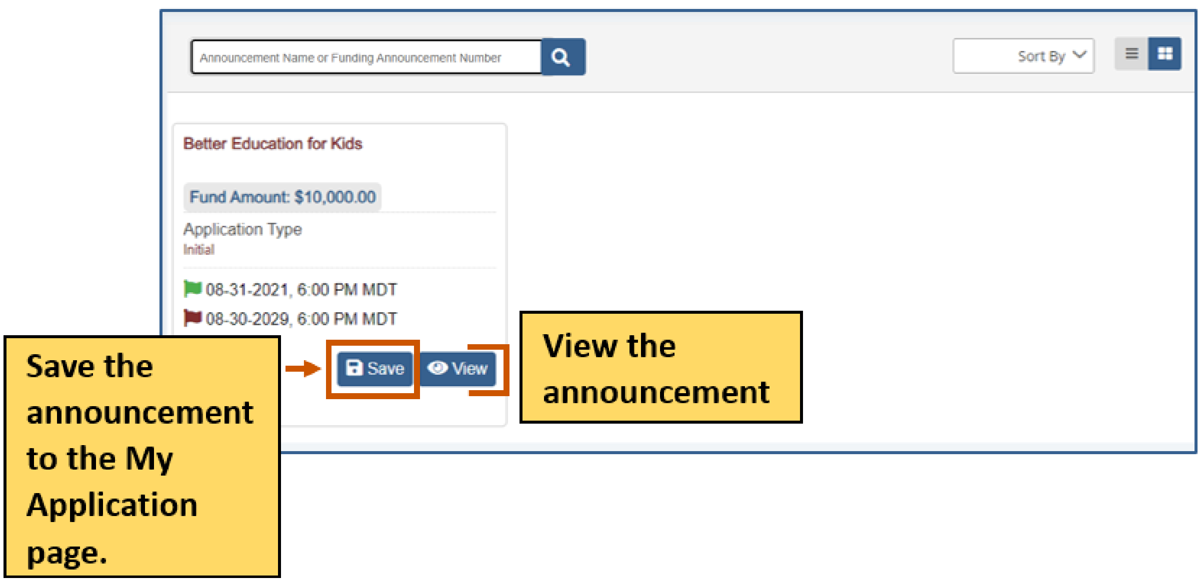


Figure 11: Funding Announcement Screen 2

Save an Announcement

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

Figure 12: Site Map – Funding Announcement

2. **Optional:** Use the search bar to find an announcement.
3. Click **Save** to save the announcement to the My Application sitemap section. A green Application Saved Successfully popup appears at the bottom right of the screen.

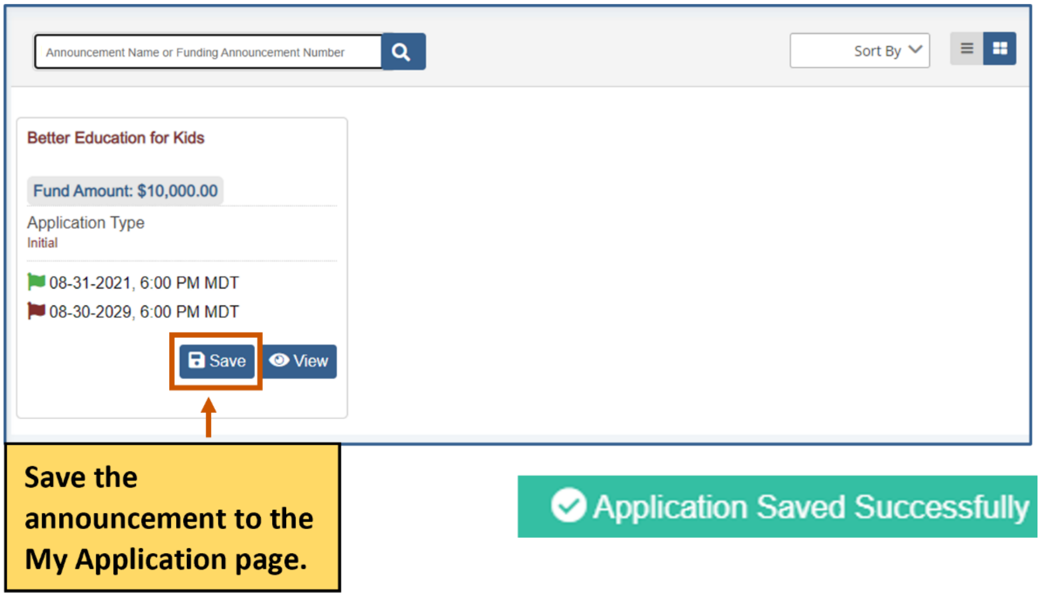


Figure 13: Save Announcement

Print the Announcement as a PDF

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

Figure 14: Print PDF Funding Announcement

View Attachments associated with the Announcement

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

Figure 15: View Attachments

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

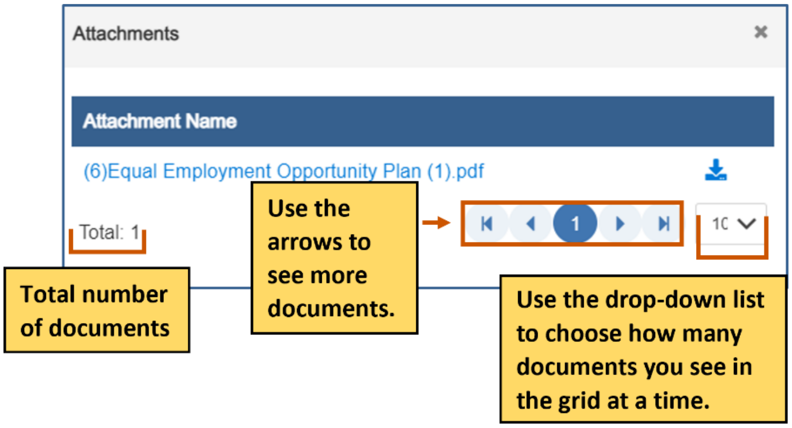


Figure 16: Attachments Dialog Box 1

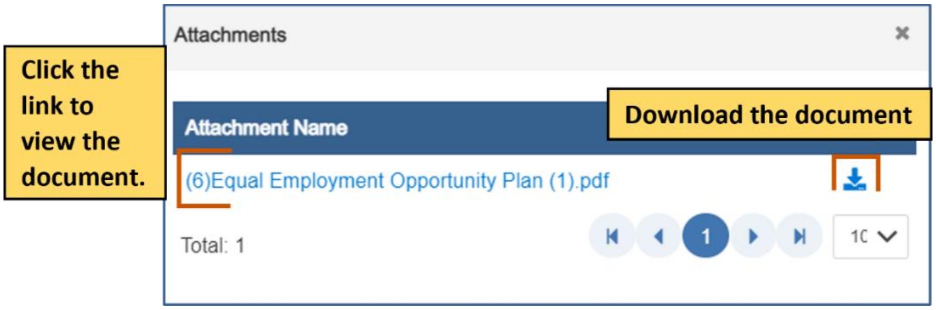


Figure 17: Attachments Dialog Box 2

Submitting an Application

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

Figure 18: View Announcement

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

Figure 19: Apply to Announcement

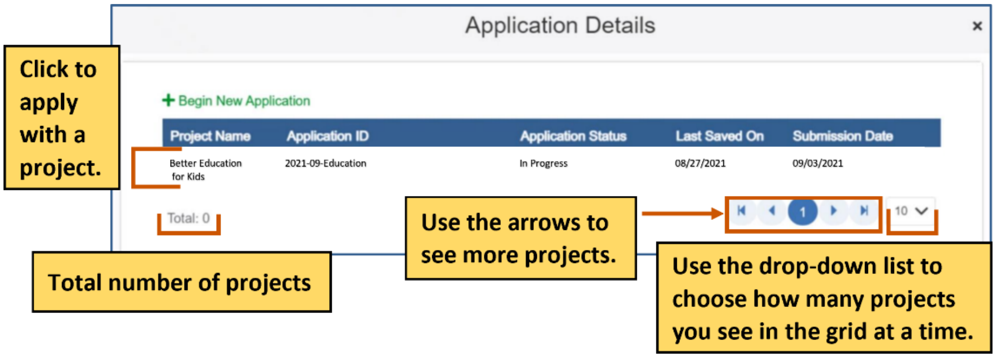


Figure 20: Application Details Dialog Box

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

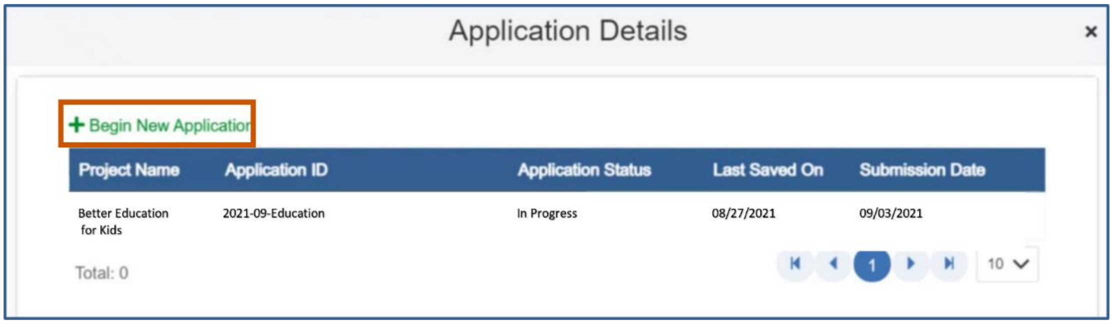


Figure 21: Begin New Application

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

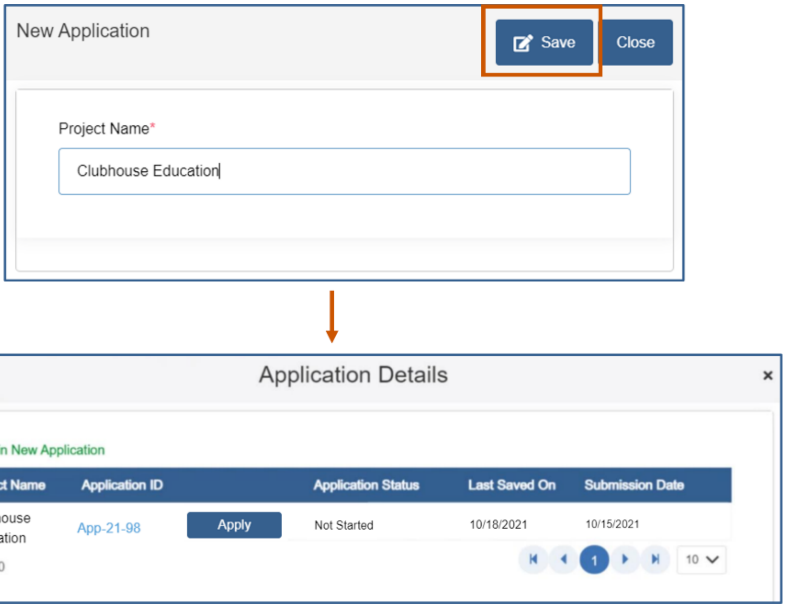


Figure 22: New Application Dialog Box

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

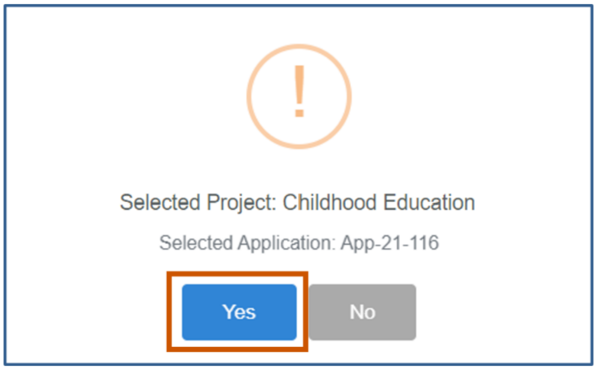


Figure 23: Warning Choose Project

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

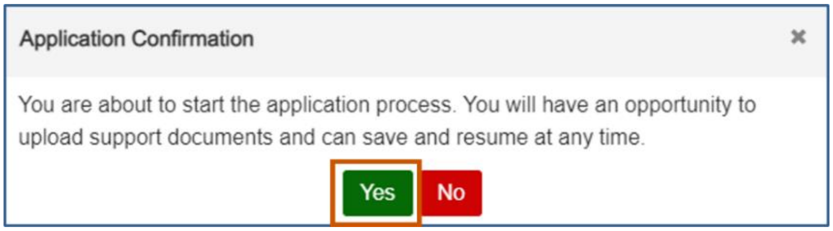


Figure 24: Application Confirmation Dialog Box

8. Click **Yes.** The application process begins.
9. Answer all the questions and complete the templates. Not all applications have an Objective or Budget Template. Each tab needs to be completed before submission. Swap between the tabs to complete them in any order.
   Note: Once you complete a tab item, the red x next to the name turns into a green checkmark. Make sure all questions are complete.

   Application Questions:
   a. **Optional:** Use the hamburger menu to see all the questions.
      Tip: The questions are color-coded to indicate the completion process.
      - **Blue –** The question is in progress.
      - **Gray –** The question needs to be viewed.
      - **Green –** The question is complete.

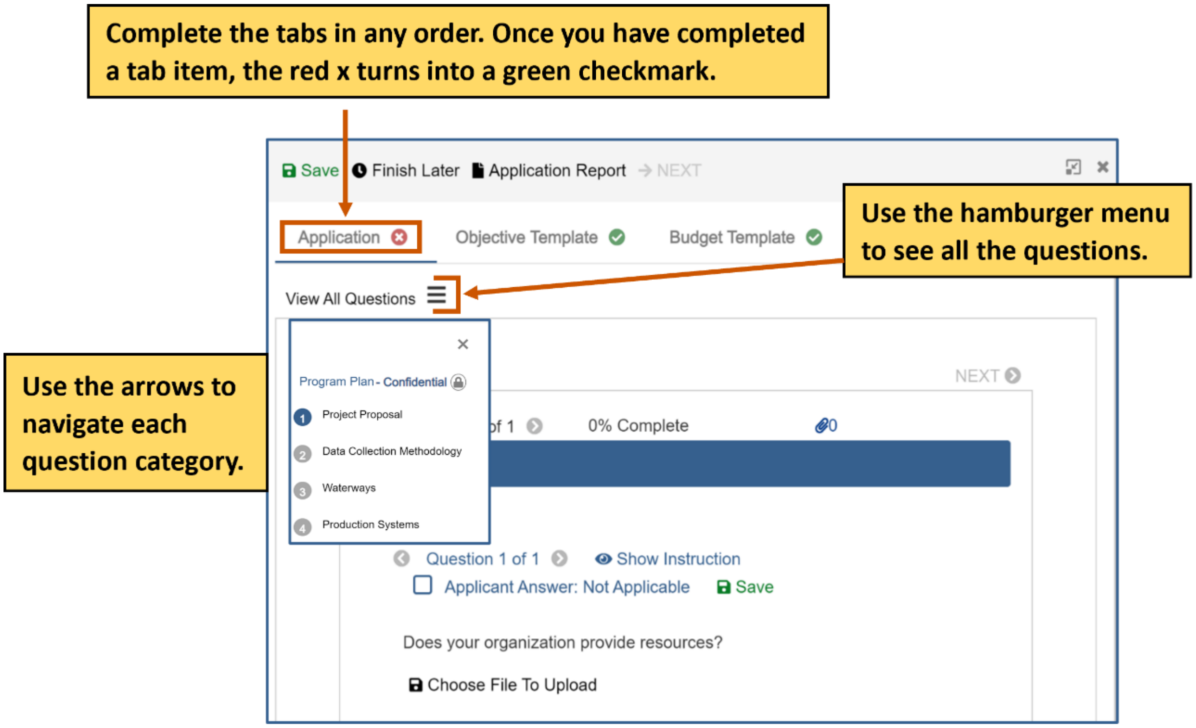


Figure 25: Use Hamburger Menu

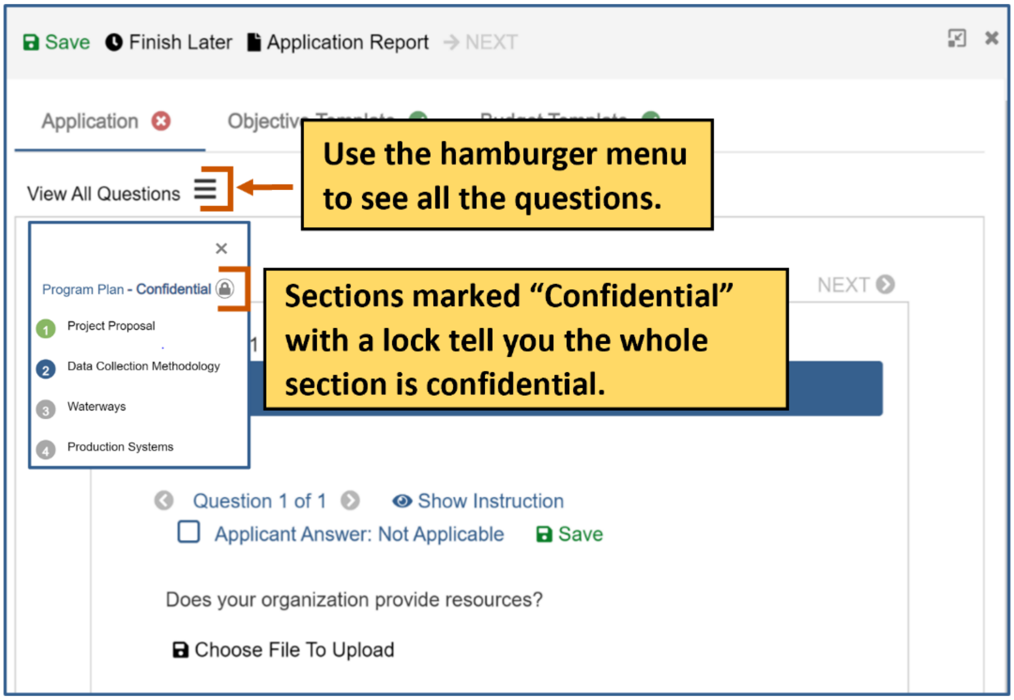


Figure 26: Hamburger Menu Status

b. Use the arrows to navigate the questions.

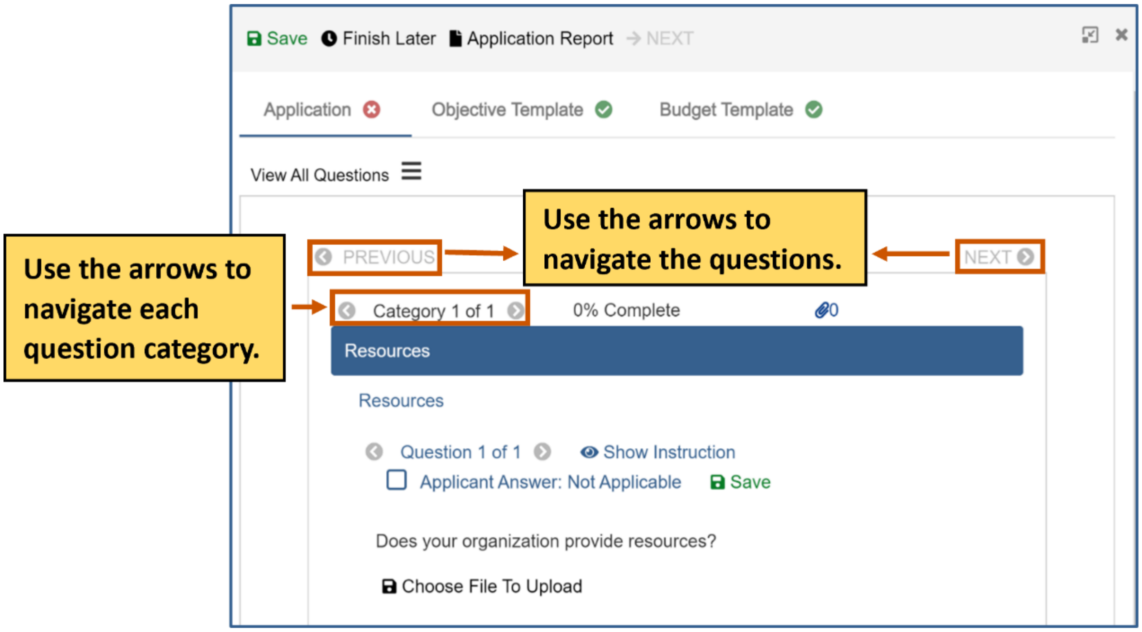


Figure 27: Use Arrows through Questions

ⓘ **Note:** If you are an Applicant Delegate – Standard user, you cannot view the confidential section and questions. Therefore, you cannot complete the submission process.

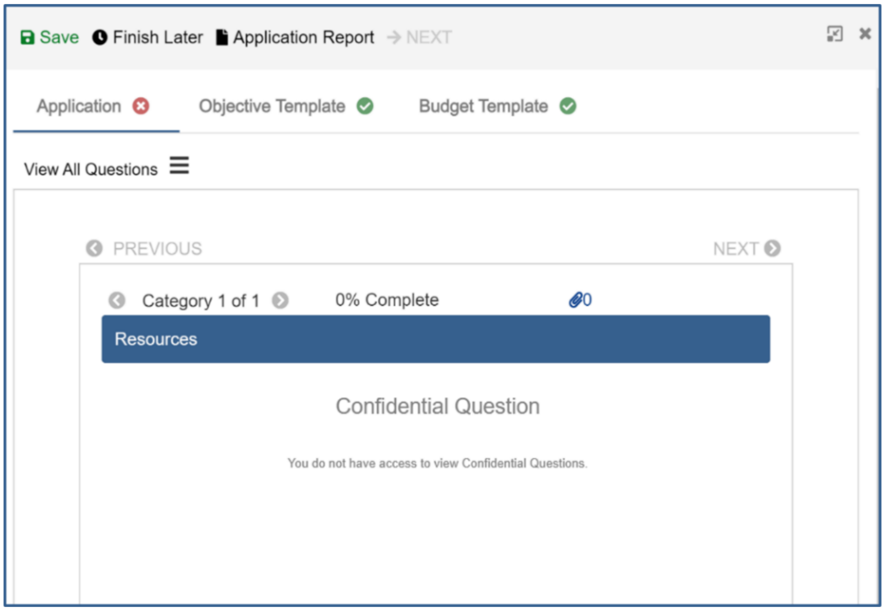


Figure 28: No Access to Confidential Section

c. Complete the question and click Save or a navigation arrow to save the question. For more information, see [Applicant Question Types](#).
Note: If a question requires additional information, the answer will not save until the required fields are answered. You are required to have a 100% completion before you can submit the application.

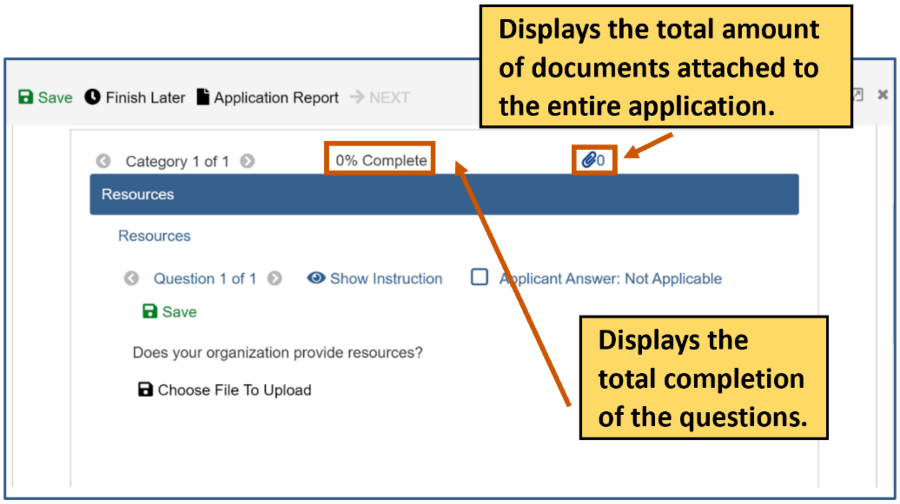


Figure 29: Question Completion

Narrative fields may have a character limit that will display the maximum number of characters an applicant response may contain. The character limit will count down until it reaches zero (0), and the system will not allow you to continue typing. If there is no character limit it will be indicated by a double dash (--).

d. **Optional:** If the question requires you to attach a document, attach it to the question.
   i. Click **Choose File To Upload.** The Documents dialog box appears.

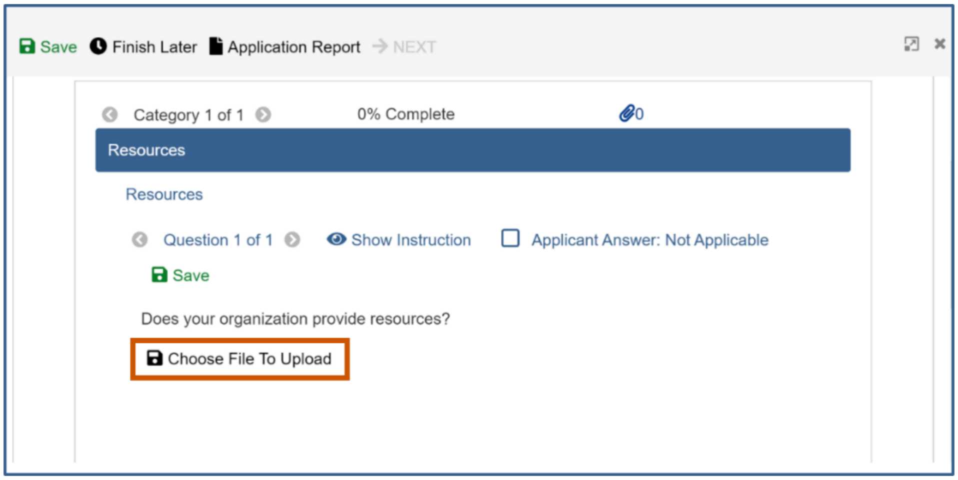


Figure 30: Add Attachment to Question

   ii. Choose from the picklist.

.

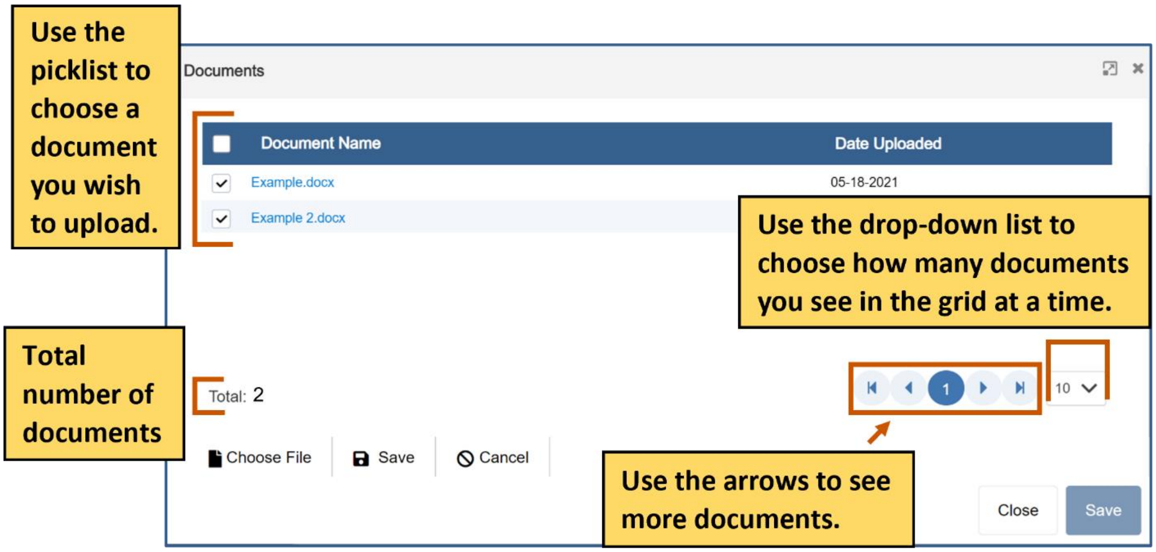


Figure 31: Choose Attachment for Question

Or

   i. Upload a new document by clicking **Choose File** **.**
   ii. **Upload the document.**
   iii. Click **Save** **.**
   iv. Click **Save.** The document is attached to the question.
   Note: Confidential documents have a lock indicator. They can only be attached to a confidential question.

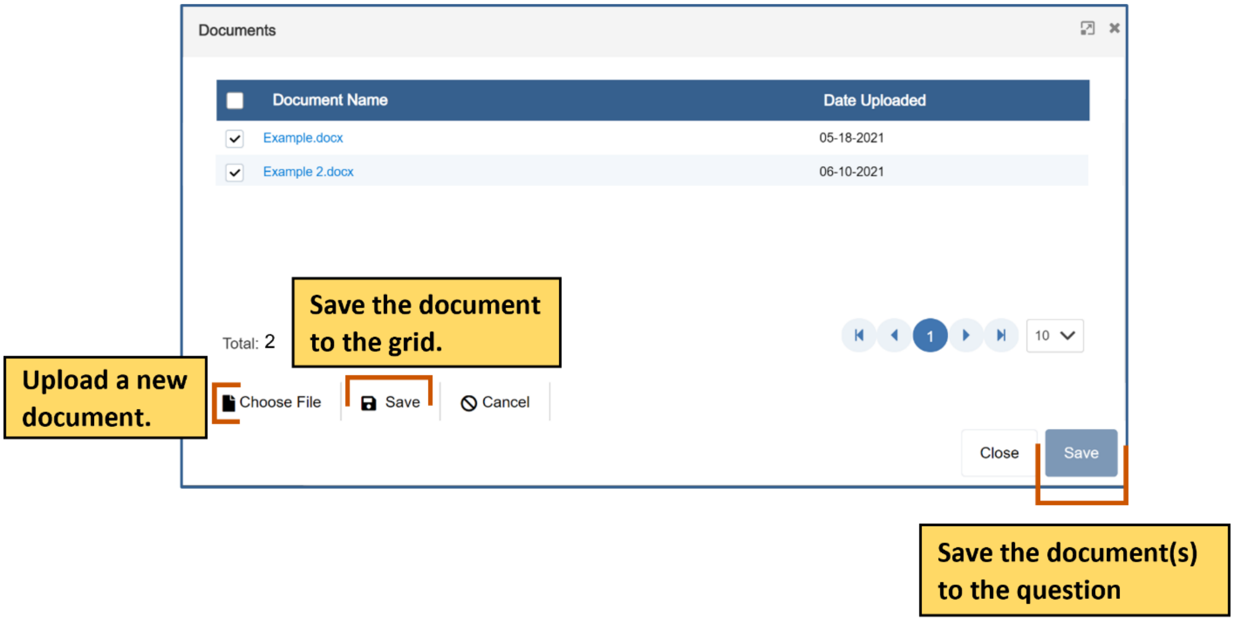


Figure 32: Upload Attachment

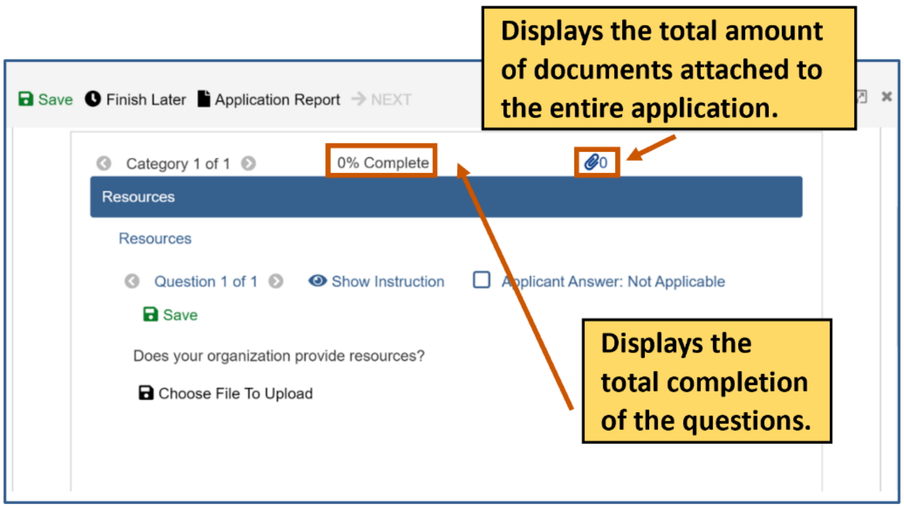


Figure 33: Question Completion

Optional: Complete the Objective Template:

ⓘ **Note:** The funding announcement can be published without using the Objective Template. Objective Templates can be left blank for you to complete entirely.

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

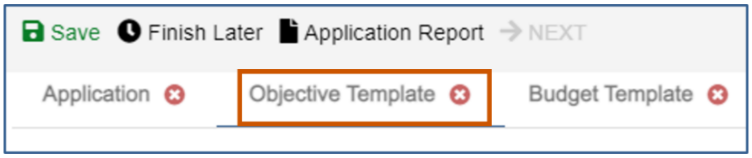


Figure 34: Complete Objective Template

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

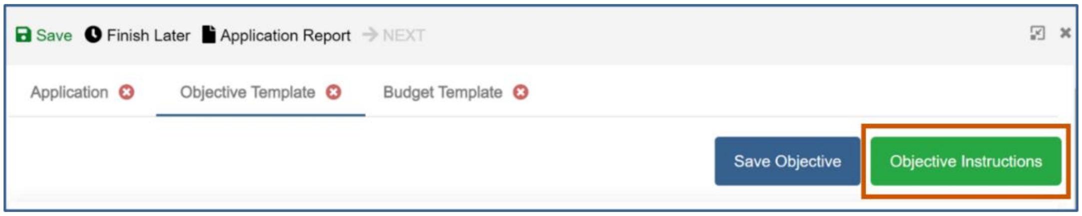


Figure 35: View Objective Instructions

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

Figure 36: Maximize or Save Objective Instructions

d. Add in the goals if necessary. If goals are required, each objective must be associated with a goal.
Note: The Goal radio button only appears if the option has been selected when the announcement was made.

e. Add in the objectives, performance measures, and grant activities.
Note: The performance measures and grant activities must be associated with an objective. For more information on how to add, edit, or delete a goal, objective, performance measure, or grant activity, see Objective Tools.

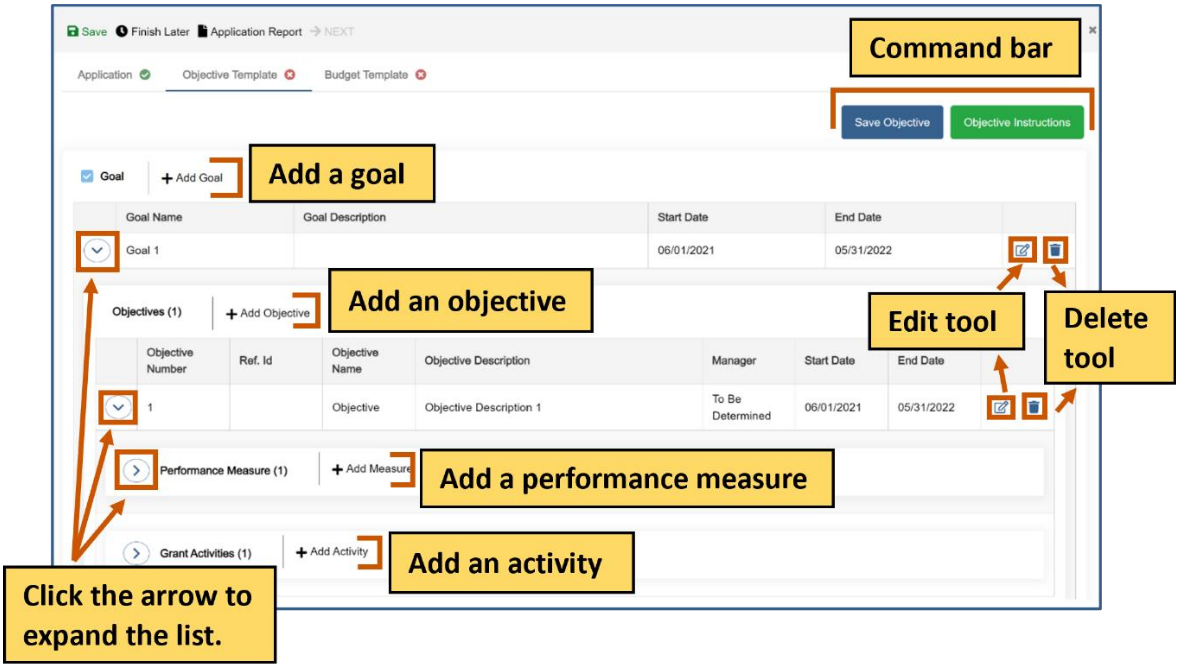


Figure 37: Objective Template

Objective Template Command Bar	Description
Save Objective	Saves the objectives and locks the Objective Template.
Objective Instructions	Display the instructions on how to complete the Objective Template.

Table 2: Objective Command Bar

f. Click **Save Objective.** The Objective Template is saved and locked. The objectives must be saved and locked before you can submit the application.

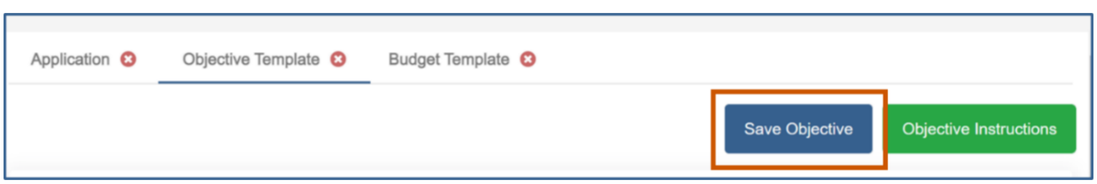


Figure 38: Save Objective Template

g. **Optional:** You can unlock the Objective Template again if you need to make changes.

   i. Click **Return to Draft.** The Objective Template is locked, and you can edit it. You can go in and out of draft during the application process.

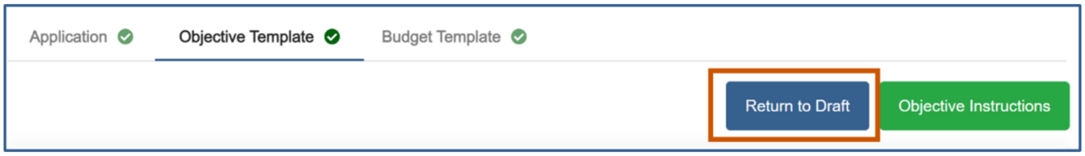


Figure 39: Return Objective Template to Draft

Complete the Budget template.

Note: There are different design setups for the budget. The items you can add/change depend on the properties selected when the announcement was made. For more information, see Budget Tools. If there is no budget, you will be required to input a "Requested Amount" on the final page of the application. The budget template can be left blank so you can input a custom budget.

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

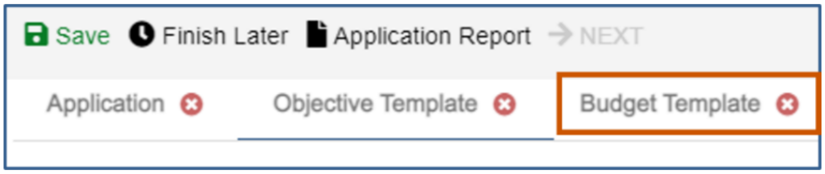


Figure 40: Complete Budget Template

b. Use the Budget Year drop-down list to choose a budget year.
c. Click **Budget Instructions** to view the instructions on how to complete the Budget Template.

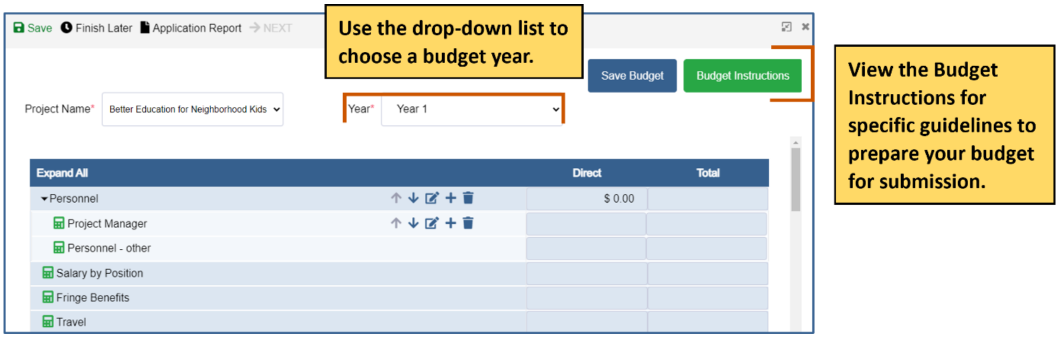


Figure 41: Budget Options

d. Use the budget tools to add, edit delete parent categories, sub-categories, or sub-sub-categories.
e. **Optional:** Type in money amounts for each budget category.
   Note: The Cash Match, In-Kind Match, and Leveraged columns may be hidden depending on the announcement configuration.

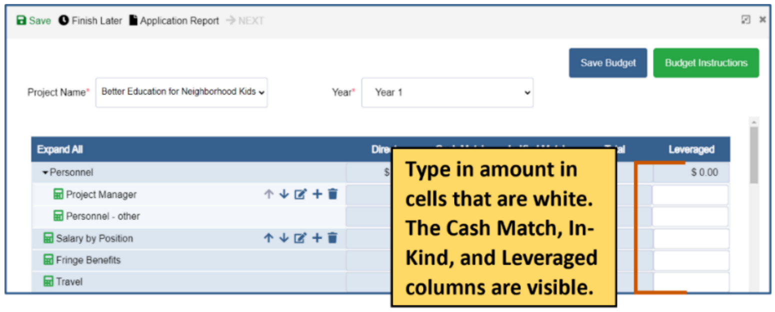


Figure 42: Columns Shown

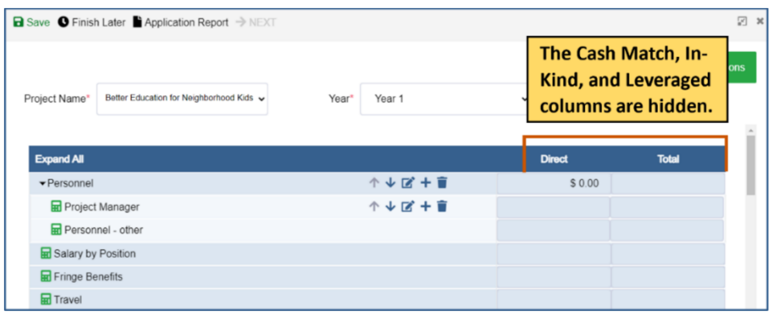


Figure 43: Columns Hidden

If you can complete budget calculations and/or narratives, a green **Budget Justification** icon appears on the line-item. Otherwise, you are not able to do this task.

f. **Optional: Single-click Budget Justification** in the line-item next to a category to show budget calculations and/or the budget narrative. The Budget Justification dialog box appears.

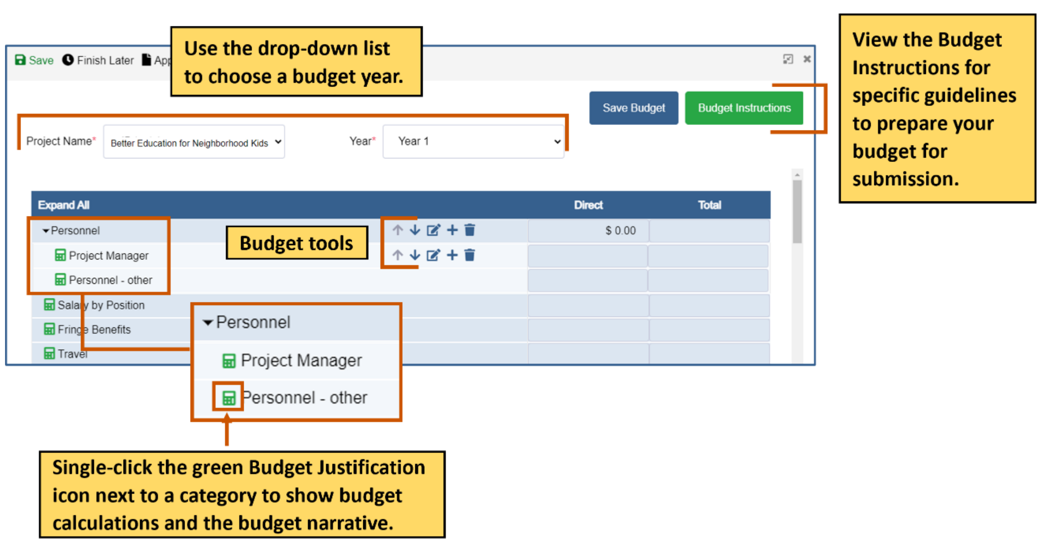


Figure 44: Budget Tools

g. Fill in the necessary fields.
   Note: The red asterisks indicate required fields.

h. Click **Save** to save the calculation. Repeat steps f – h for each budget calculation and/or narrative. For more information, see Budget Calculation/Narrative Tools.

   Tip: If you need to delete an entry from the grid, click **Delete Entry.** The calculation and/or narrative disappears from the grid.

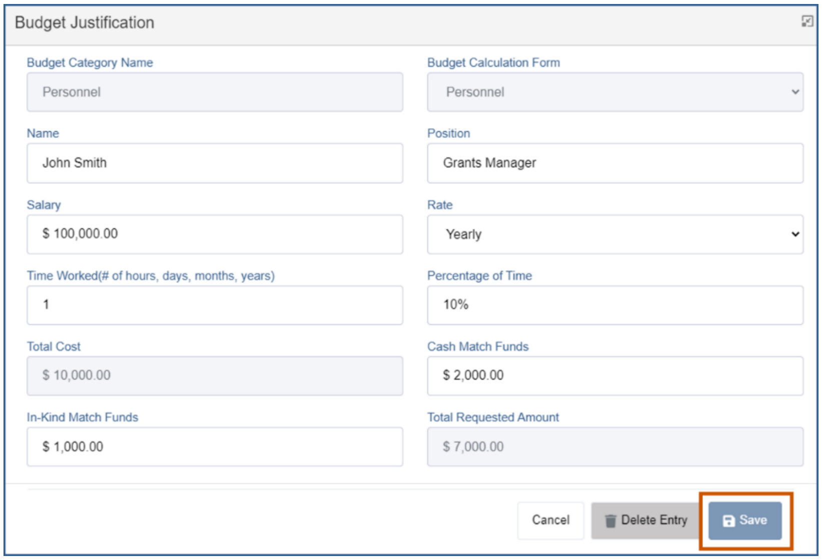


Figure 45: Save Calculation/Narrative

i. Click **Save Budget.** The Budget template is saved and locked. The budget must be saved and locked before you can submit the application.

Figure 46: Save Budget Template

j. **Optional:** You can unlock the Budget Template again if you need to make change.
   i. Click **Return to Draft.** The Budget Template is locked, and you can edit it. You can go in and out of draft during the application process.

Figure 47: Return Budget Template to Draft

Finish the application process

10. Once the questions and the templates are saved and locked, click → **Next.** A popup appears confirming you have reviewed your answers.

Figure 48: Finish Application Process

11. Click **Save & Continue.**

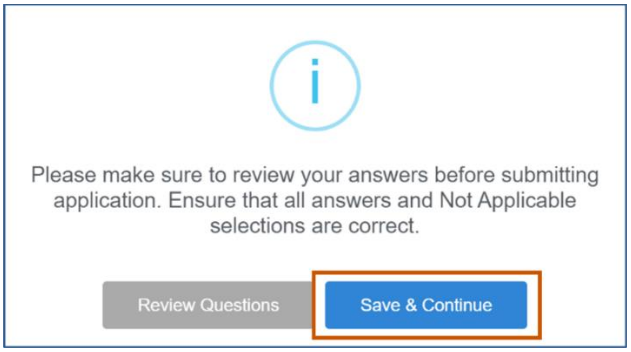


Figure 49: Warning to Check Questions

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

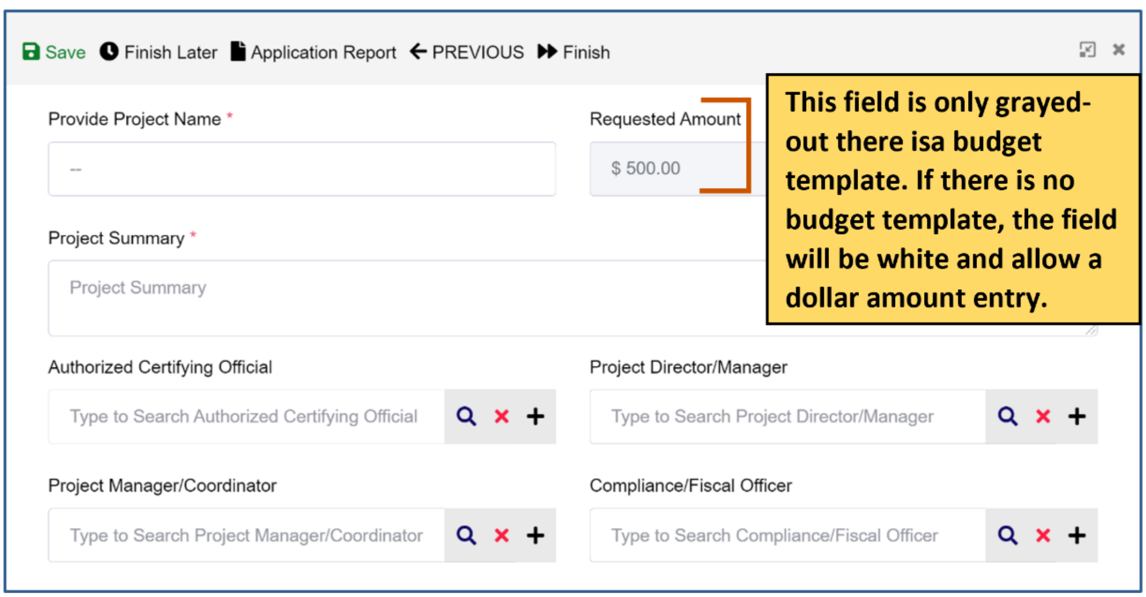


Figure 50: Project Information

13. Click ▶▶ **Finish.** The Submission page appears telling you how to go back and review your answers, how to view the application report, how to save and resume the application later, and how to submit the application.

Figure 51: Go to Submission Page

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

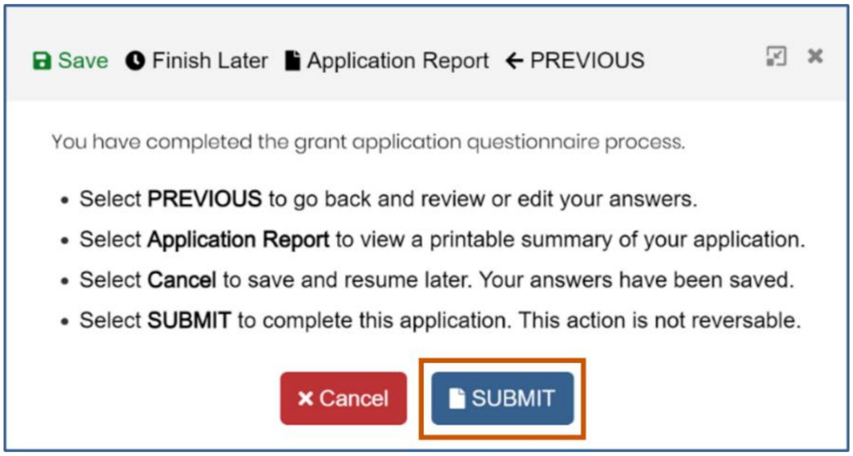


Figure 52: Submit Application

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

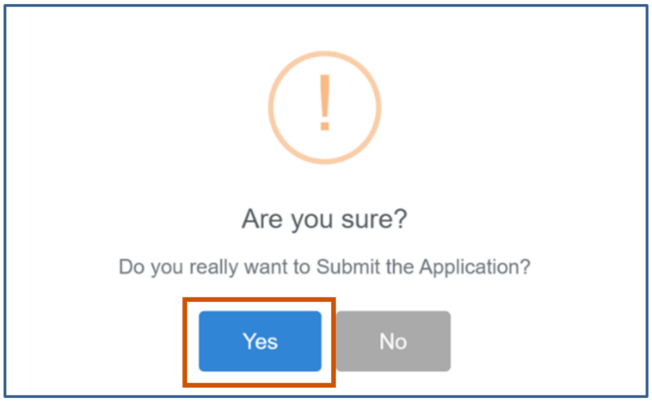


Figure 53: Warning to Submit Application

The Submit button turns into Processing with a spinning wheel. The Save button at the top also has a spinning wheel. Wait until the application has been submitted. There is a green checkmark next to the announcement indicating you have applied. A blue information popup also appears indicating that the application was submitted successfully.

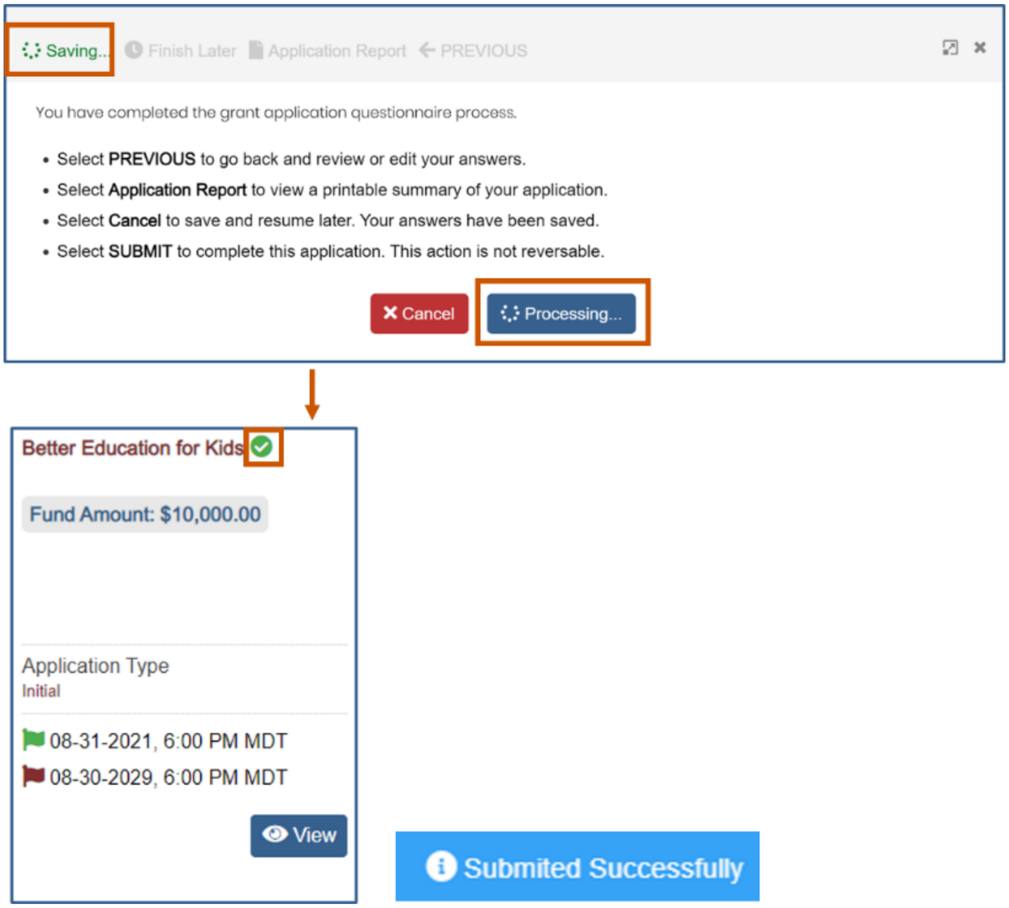


Figure 54: Submit Successful

My Submitted Application

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

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

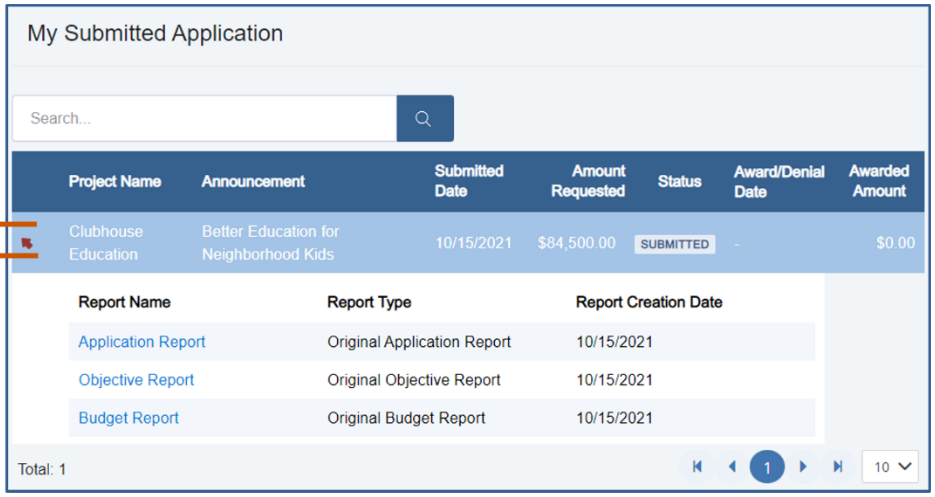


Figure 55: My Submitted Application Screen

View Reports

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

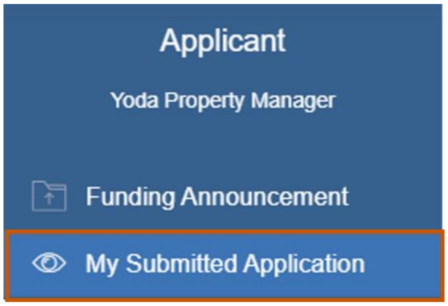


Figure 56: My Site – My Submitted Application

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

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

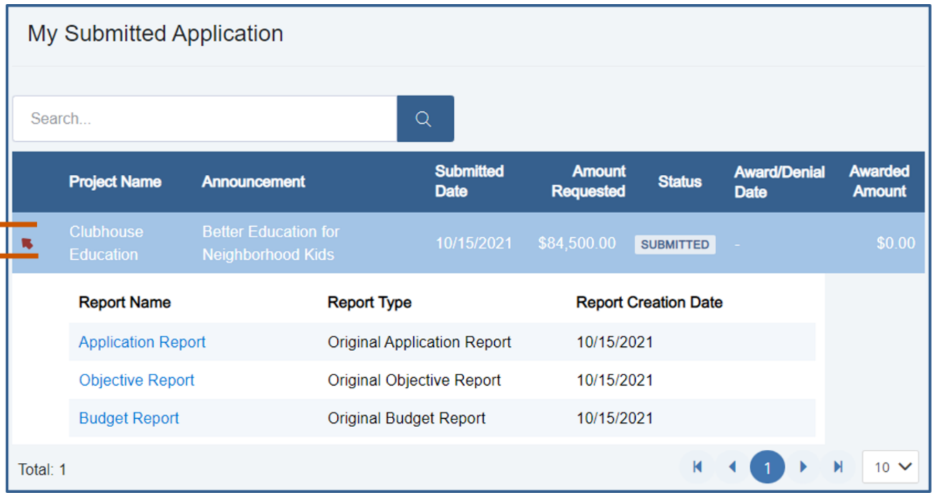


Figure 57: My Submitted Application Screen

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

Click the link to one of the reports.

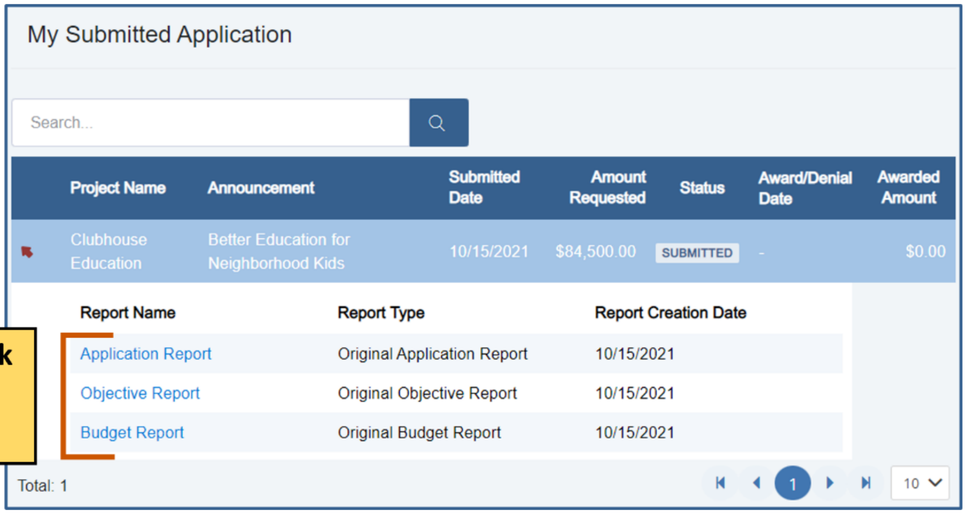


Figure 58: Click Link to Report

My Applicant Profile

Once an applicant has created a user account, they may navigate to their Applicant Profile. The Applicant Profile and related pages are a fully customizable tool to enhance the user's applications. *My Applicant Profile* is a tool designed to enhance a user's application. Here, applicants may add additional documents and relevant information such as a professional CV or other certifications related to the applicant or entity's qualifications. All applicant users must upload their documents to their User Profile before they begin a funding announcement application. Applicant's will not be able to upload documents directly to the application. Instead, the system will look to the user's profile.

1. From the site map, click **My Applicant Profile.** The Applicant Profile page appears.

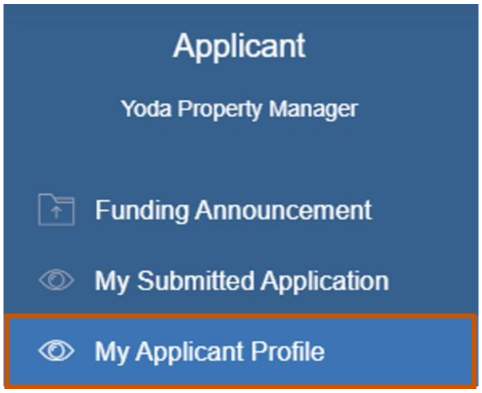


Figure 59: Site Map – My Applicant Profile

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

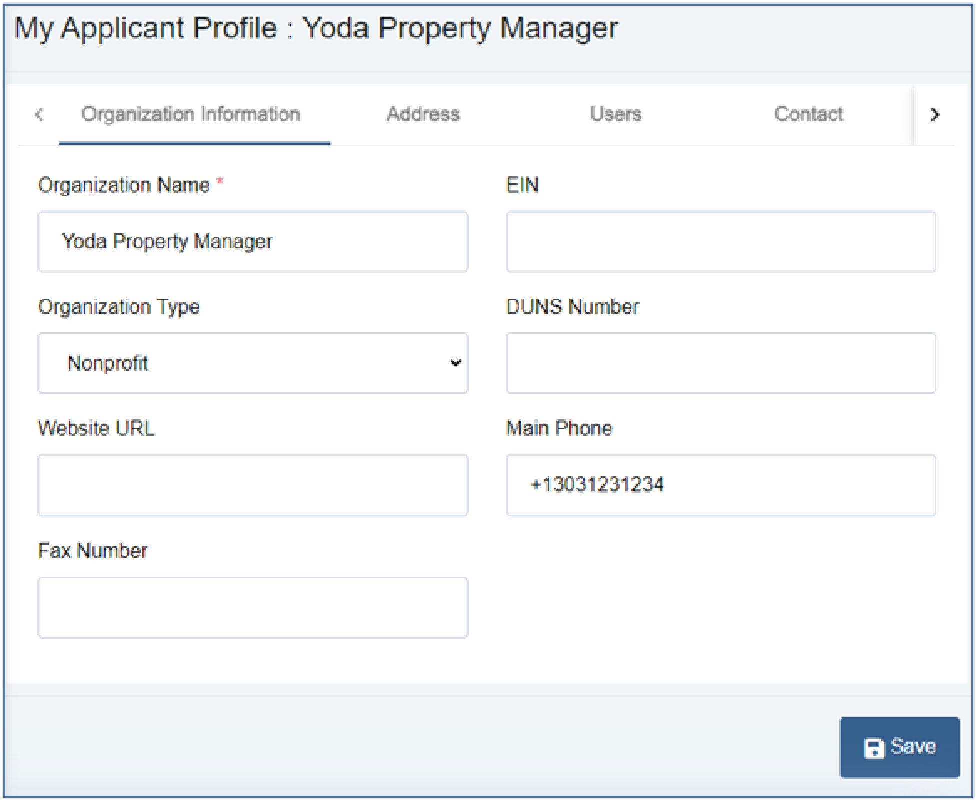


Figure 60: My Applicant Profile – Organization Information Tab

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

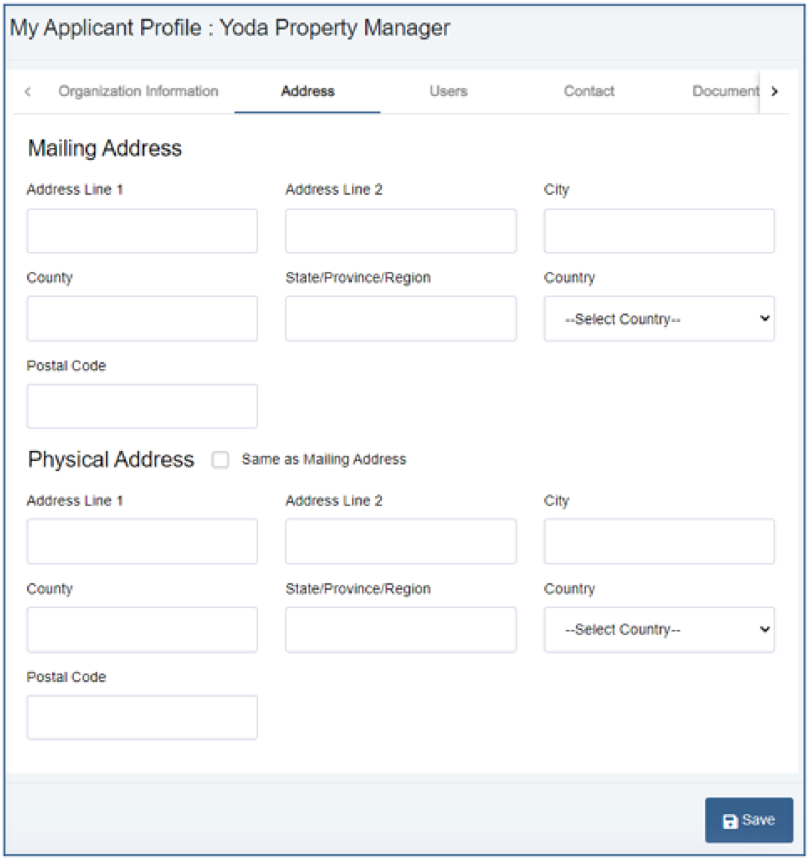


Figure 61: My Applicant Profile – Address Tab

4. **Optional:** Add a user. The user you registered with is automatically a user. Other users become applicant delegates.
    a. Click the Users tab.

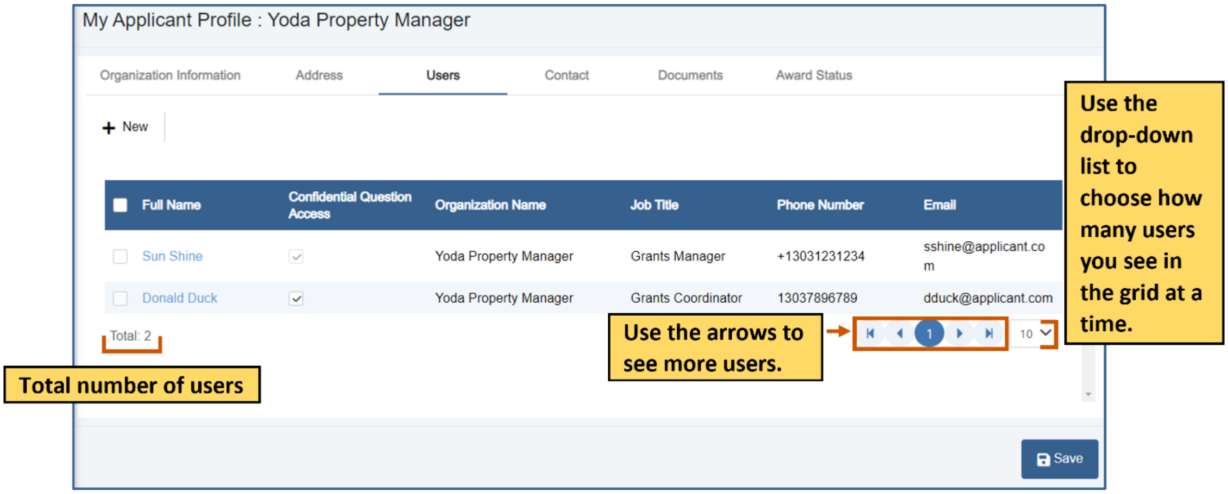


Figure 62: My Applicant Profile – Users Tab

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

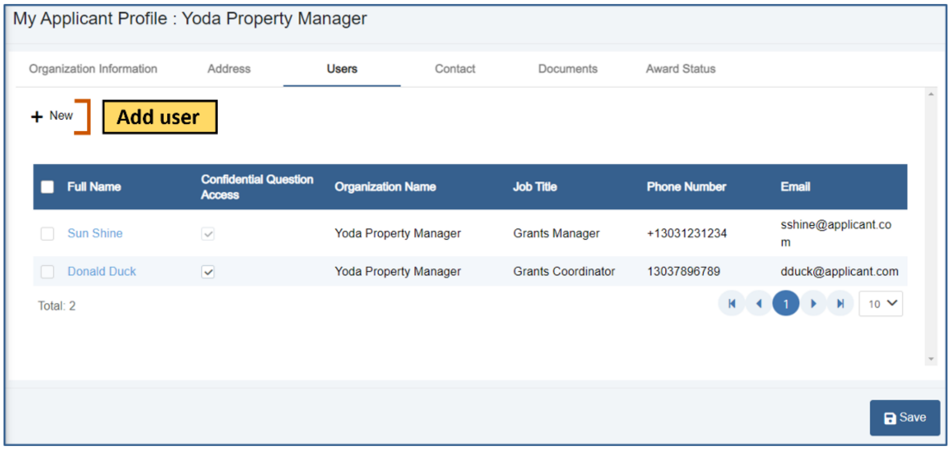


Figure 63: Add User

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

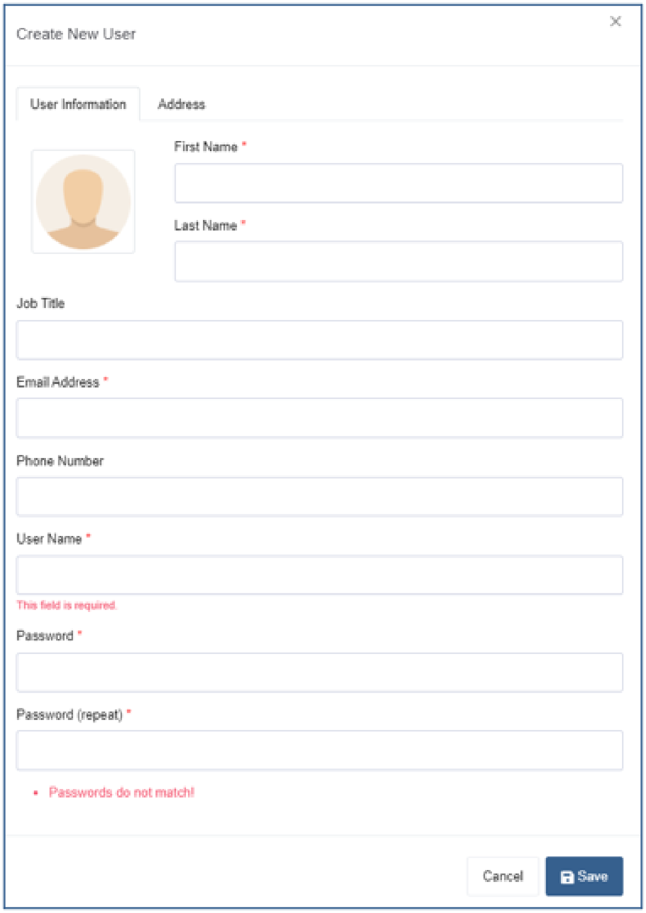


Figure 64: Create New User – User Information Tab

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

e. Click **Save** to save the user. A green User Privilege popup appears at the top right of the screen. Repeat steps 4b-4d for each user.

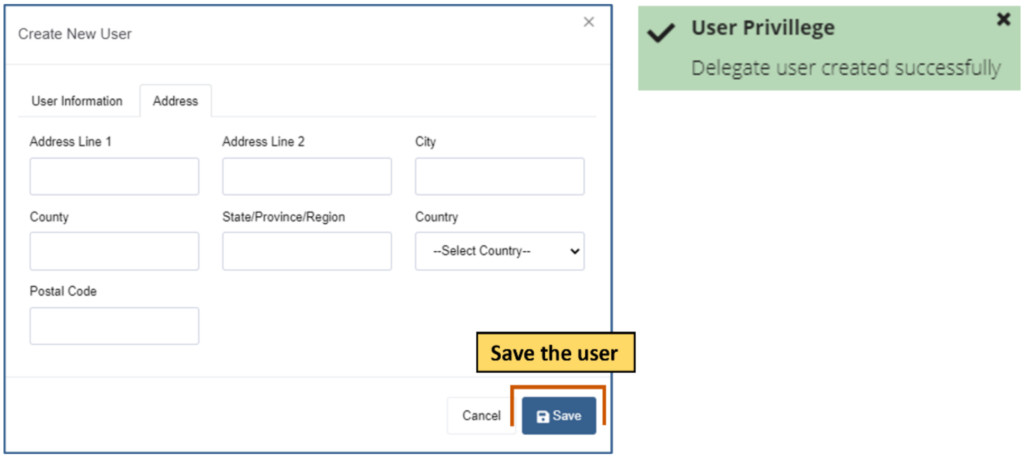


Figure 65: Create New User – Address Tab

Tip: If you are the primary applicant, you can choose to give access to confidential questions. If you are an Applicant Delegate – Confidential user or Applicant Delegate – Standard user, you cannot do this action. Marking users as confidential is not necessary to complete this step.

f. Click the radio button next to the user you wish to give confidential question access. Uncheck the radio button to revoke confidential question access.

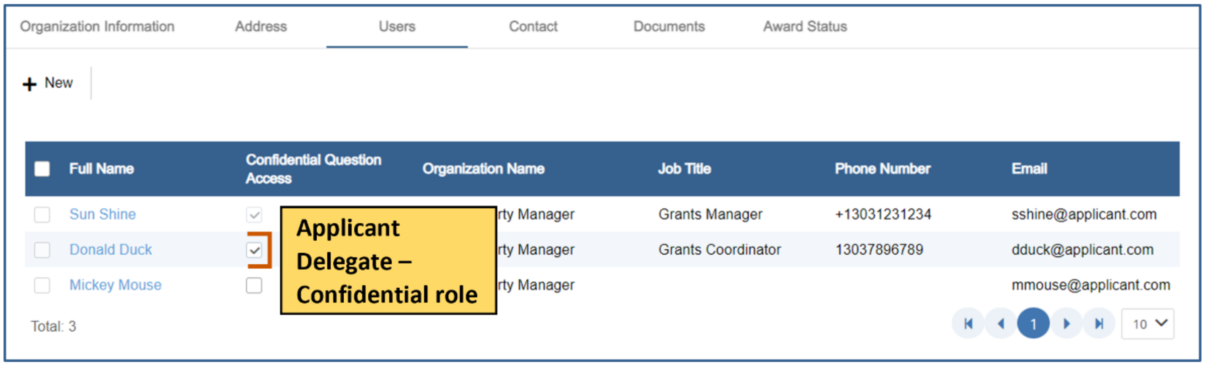


Figure 66: User Applicant Delegate – Confidential

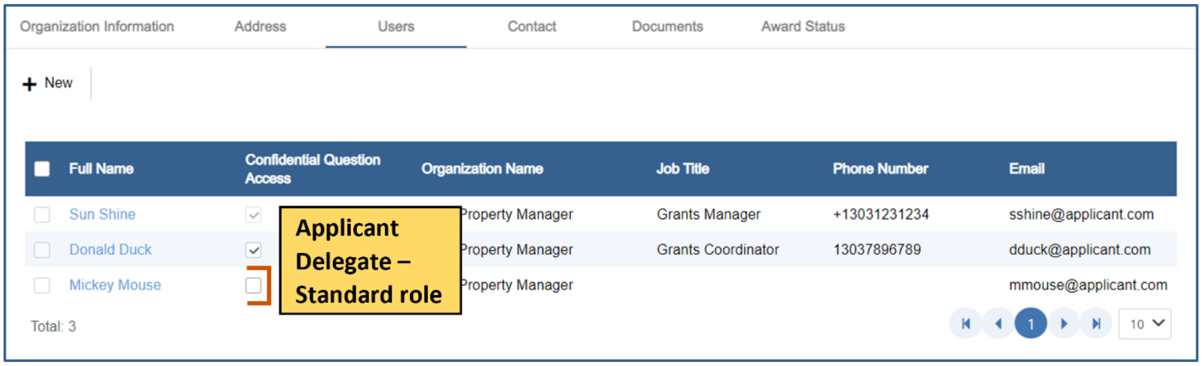


Figure 67: User Applicant Delegate – Standard

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

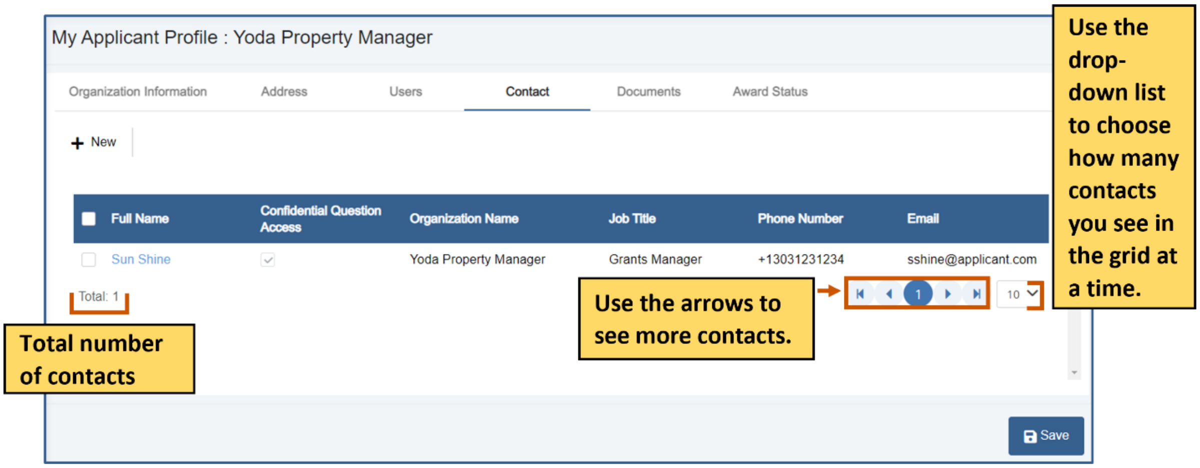


Figure 68: Create New User – Contact Tab

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

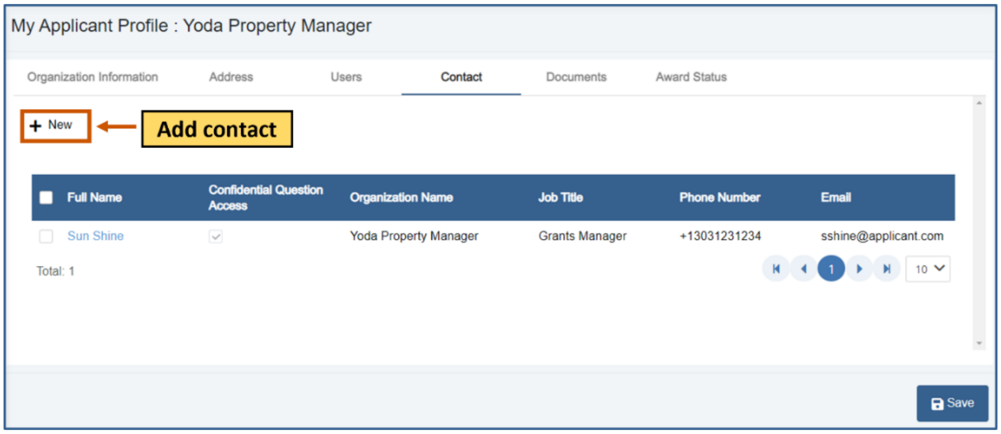


Figure 69: Add Contact

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

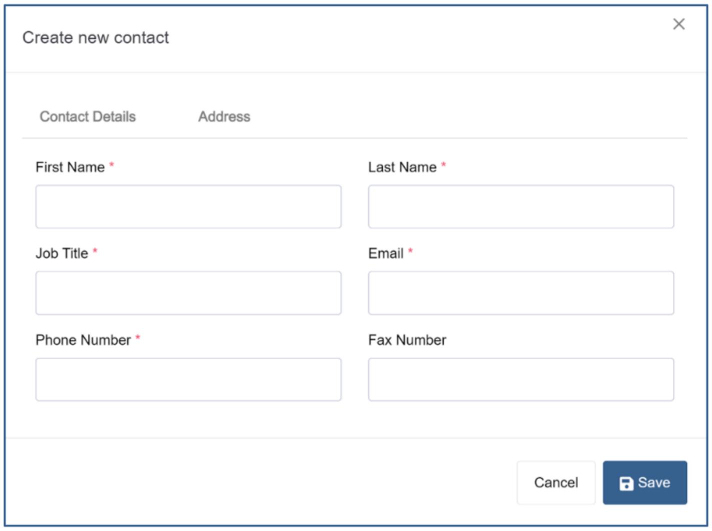


Figure 70: Create New Contact – Contact Details Tab

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

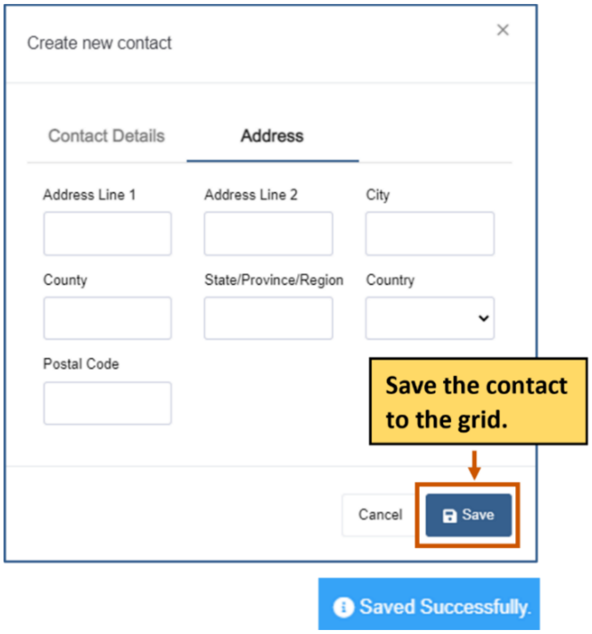


Figure 71: Create New Contact – Address Tab

6. **Optional:** On the Document tab, add a document.

Tip: If you are a primary applicant or an Applicant Delegate – Confidential user, you can choose to mark documents as confidential. If you are an Applicant Delegate – Standard user, you do not have the option to mark documents as confidential. Confidential documents are marked with a lock. Confidential documents do not show up in the grid for Applicant Delegate – Standard users. Marking documents as confidential is not necessary to complete this step.

a. **Optional:** Click the Confidential Document radio button to mark the document as confidential.

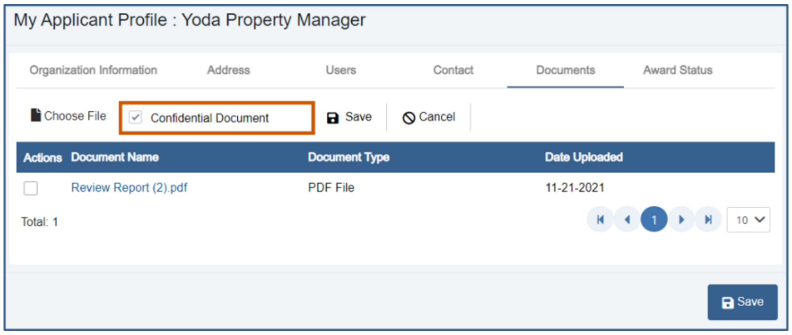


Figure 72: Mark Document as Confidential

b. Click **Choose File.**

c. Upload the file. The name of the file replaces the Choose File button.

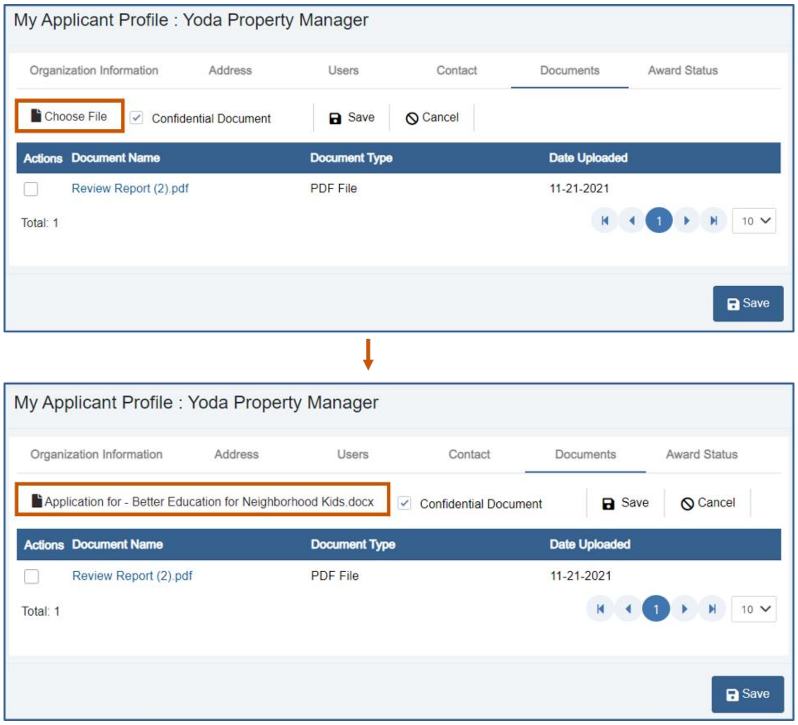


Figure 73: Add Attachment to Profile

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

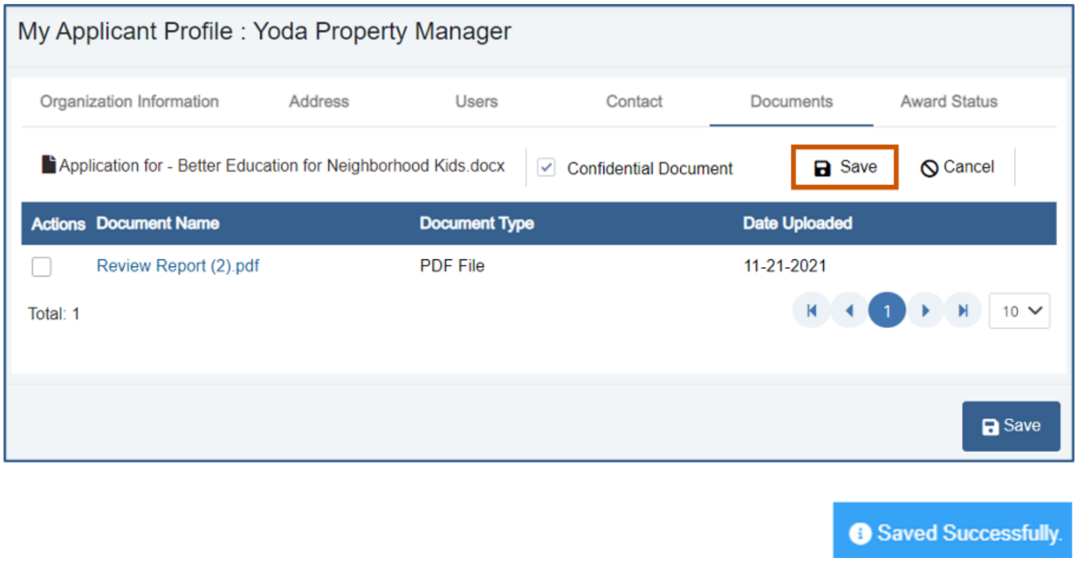


Figure 74: Save Attachment to Profile

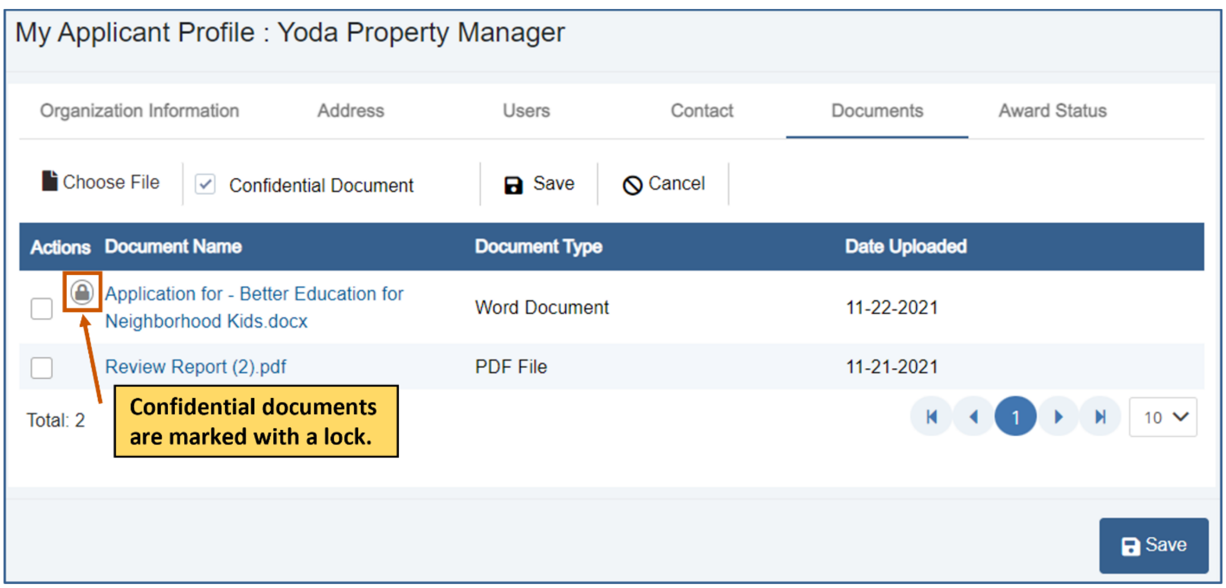


Figure 75: Confidential Document

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

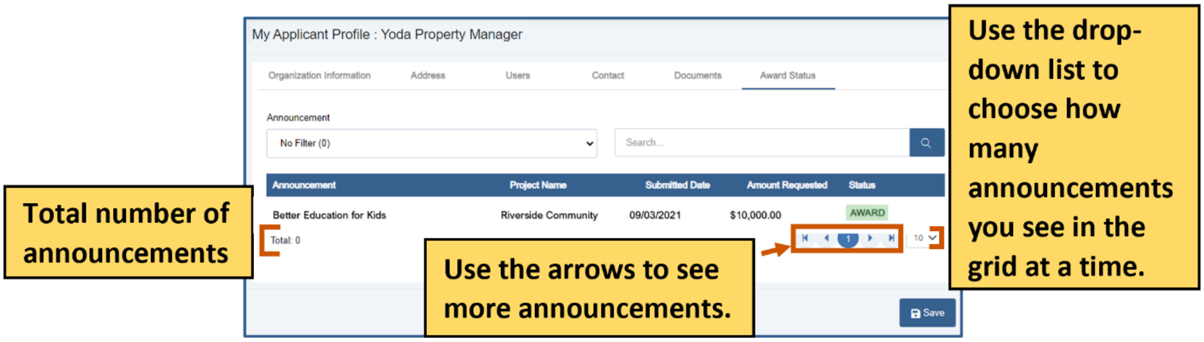


Figure 76: Create New Contact – Award Status Tab

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

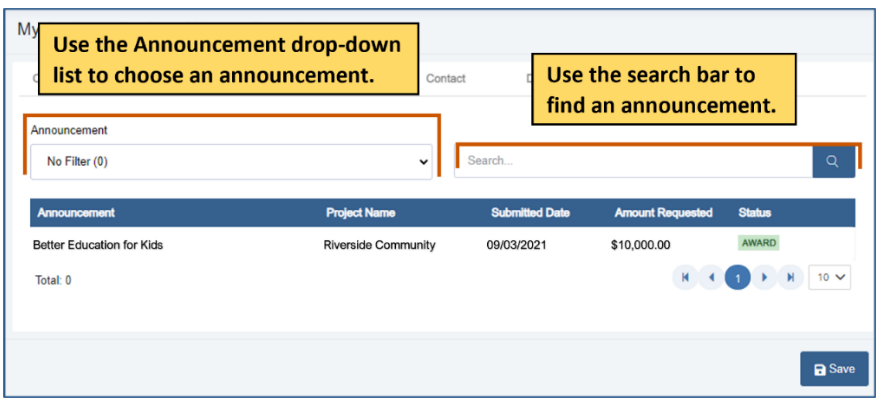


Figure 77: Choose Announcement

8. Click **Save** to save the applicant profile and close the dialog box. A blue Saved Successfully popup appears at the bottom right of the screen.

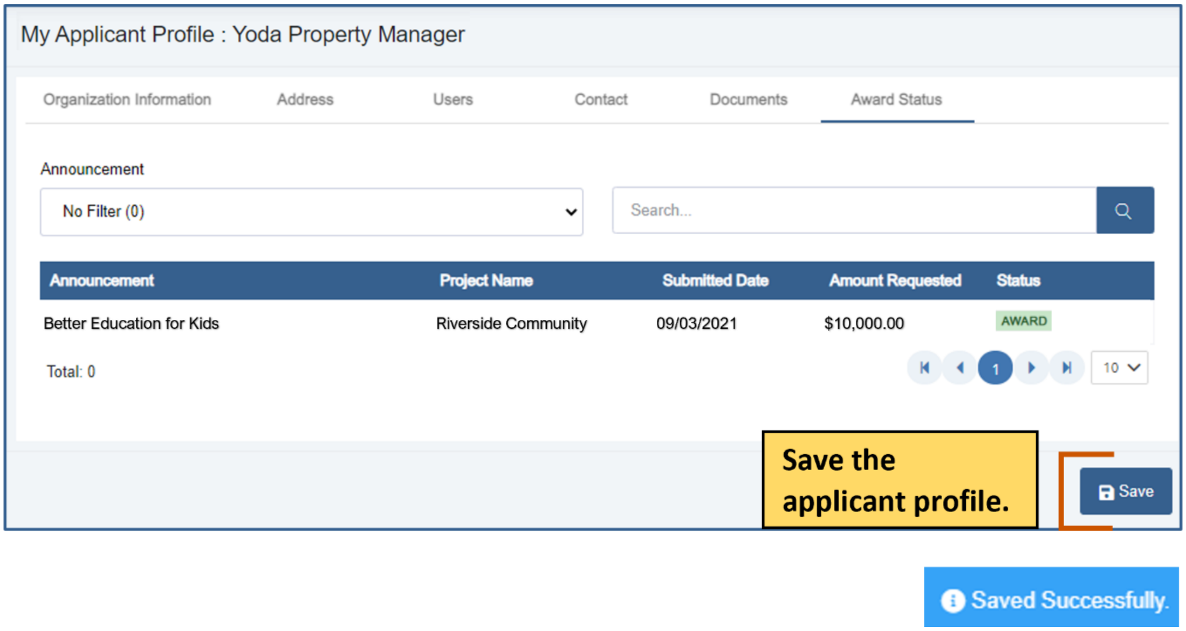


Figure 78: Save Applicant Profile

Users

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

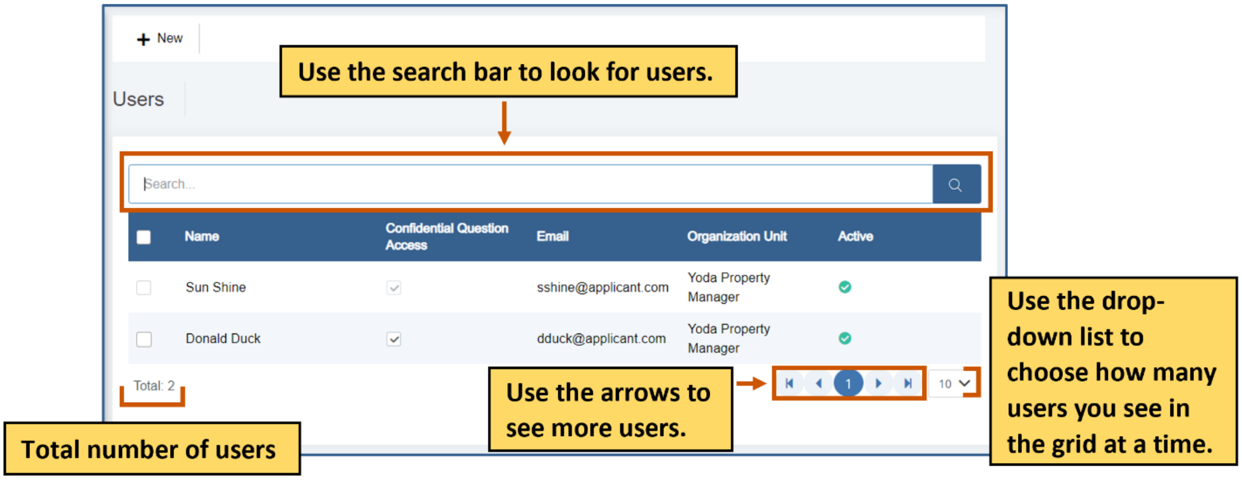


Figure 79: Active Users Screen

Active

You can view active users.

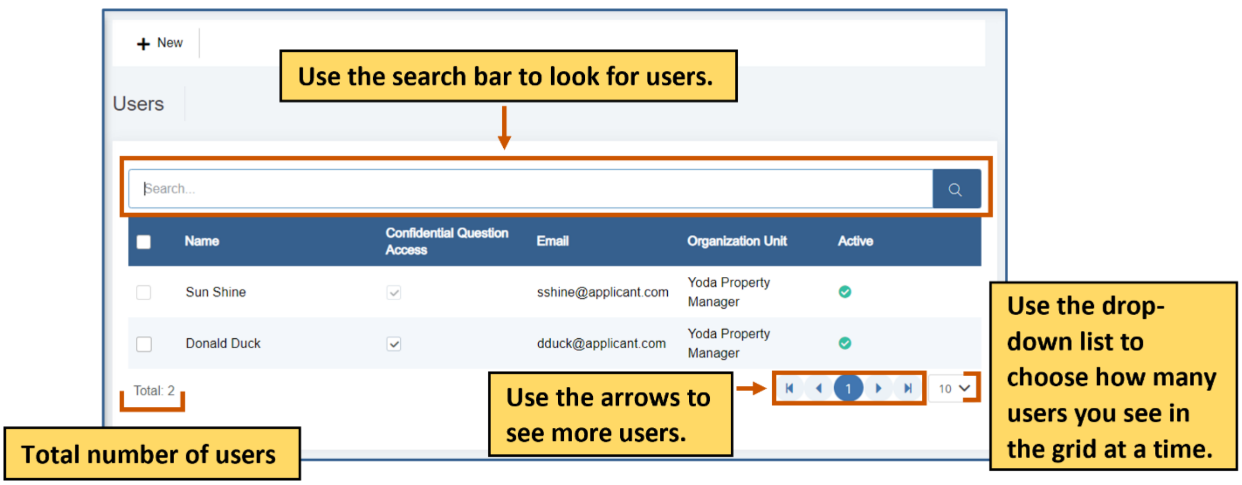


Figure 80: Active Users Screen

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

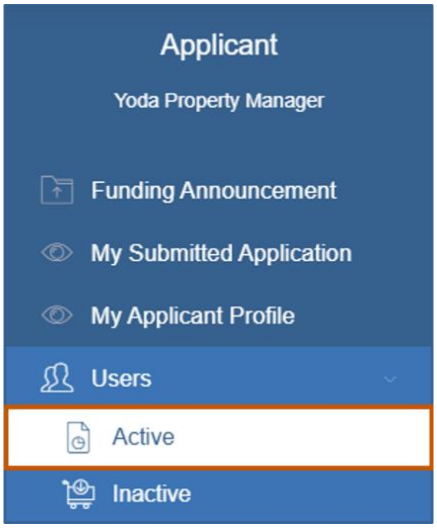


Figure 81: Site Map – Active Users

Inactive

You can view inactive review panels.

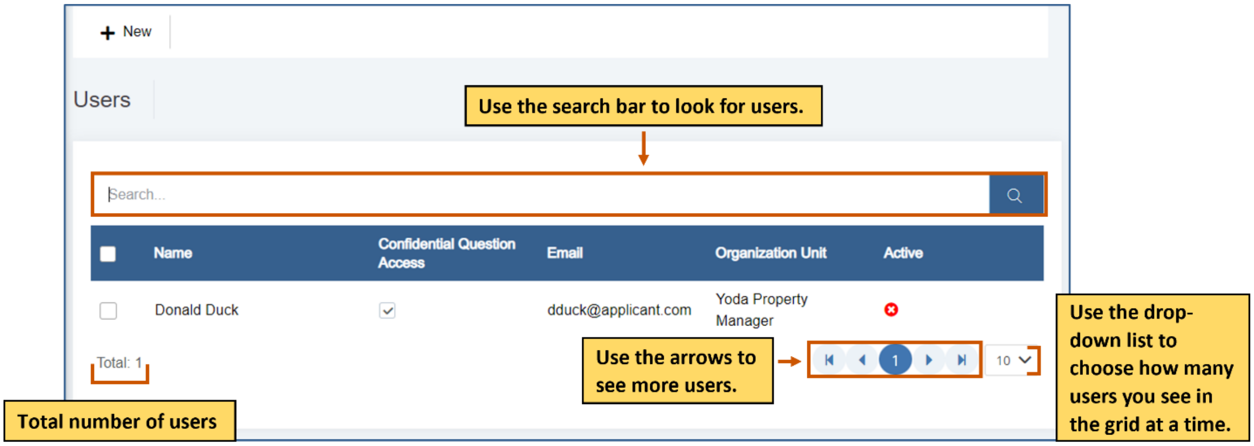


Figure 82: Inactive Users Screen

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

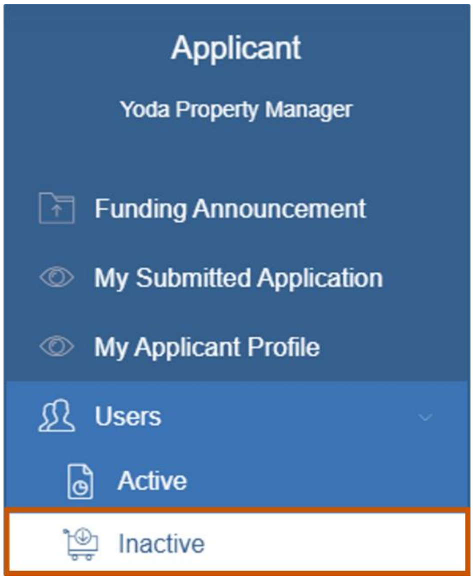


Figure 83: Site Map – Inactive Users

Create a User

You complete this action from both the Active Users and Inactive Users options from the sitemap. You can mark an applicant as confidential only if you are a primary applicant.

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

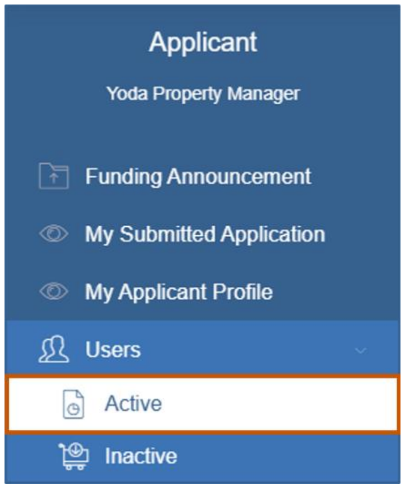


Figure 84: Site Map – Active Users

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

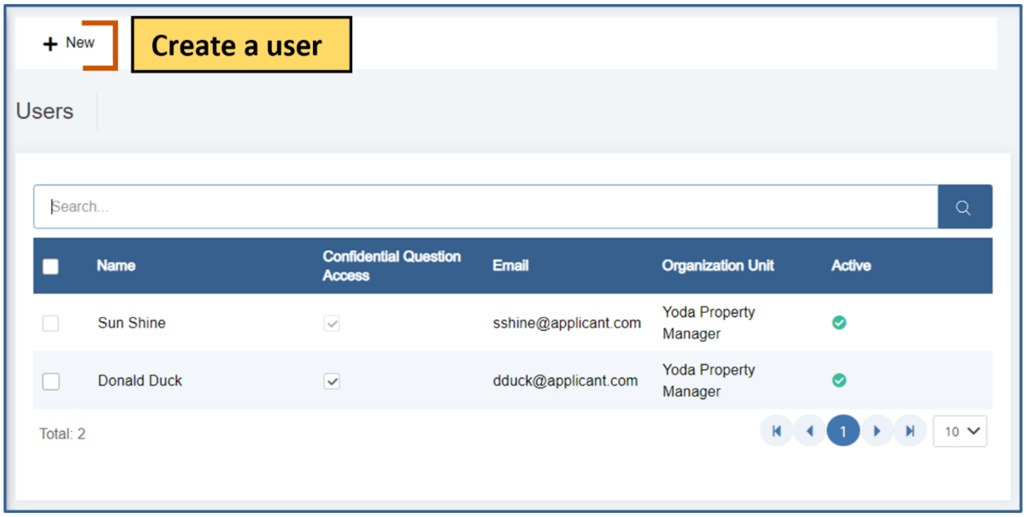


Figure 85: Create User

Under the Active column:

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

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

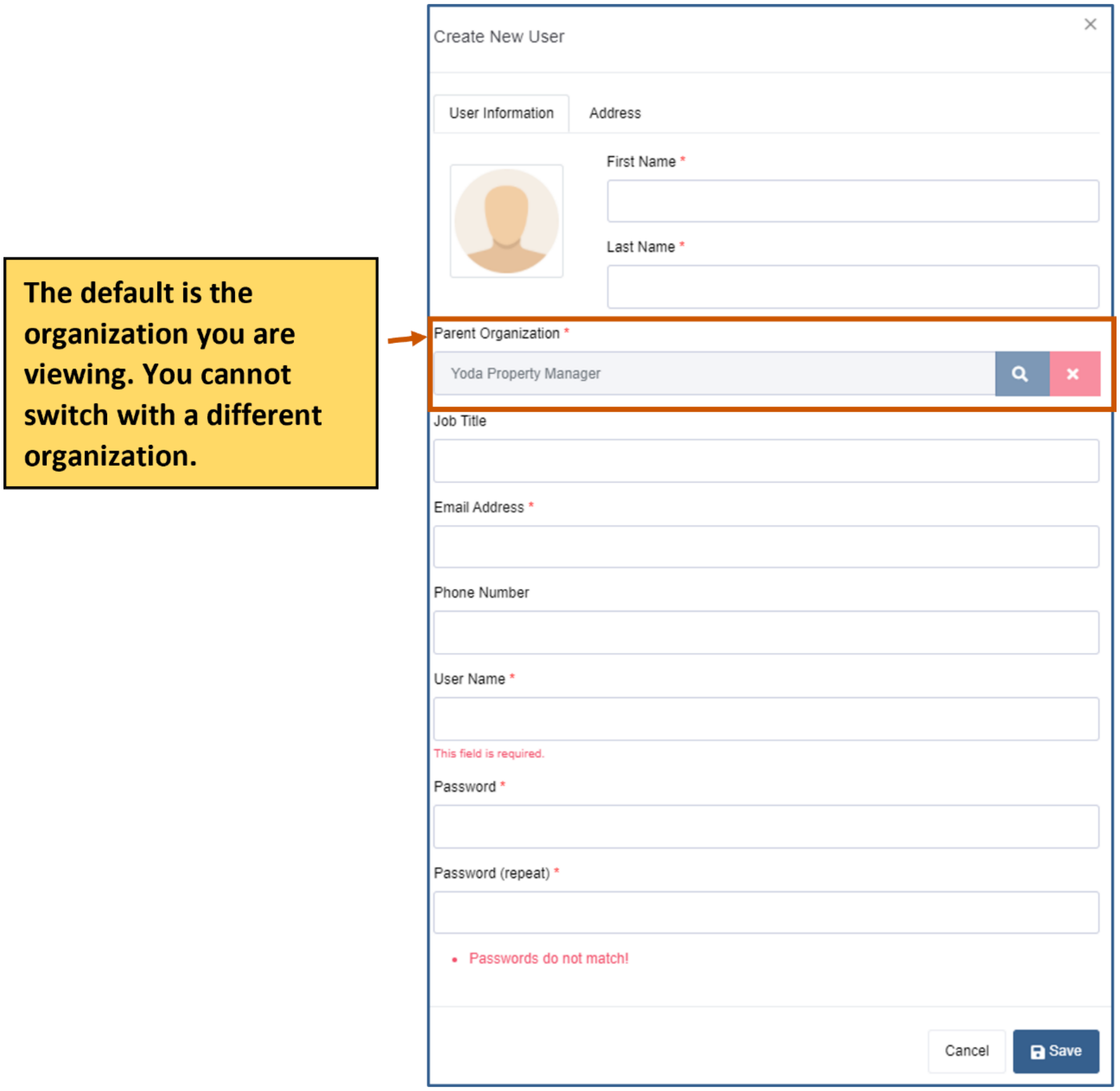


Figure 86: User Screen – User Information Tab

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

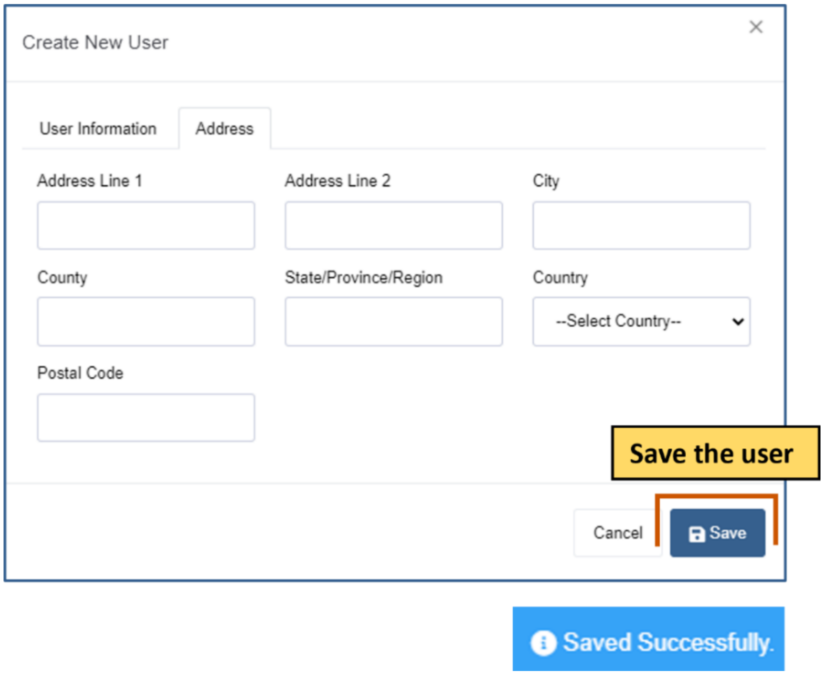


Figure 87: Create New User – Address Tab

6. **Optional:** Check the radio button under the Confidential Question Access column to give the user access to confidential questions. A green Update Successfully appears. Marking a user confidential is not necessary for completing this task. Uncheck the radio button under the Confidential Question Access column to deny the user access to confidential questions.
   Note: If you are the primary applicant, you can choose to give access to confidential questions. If you are an Applicant Delegate – Confidential user or Applicant Delegate – Standard user, you cannot do this action.

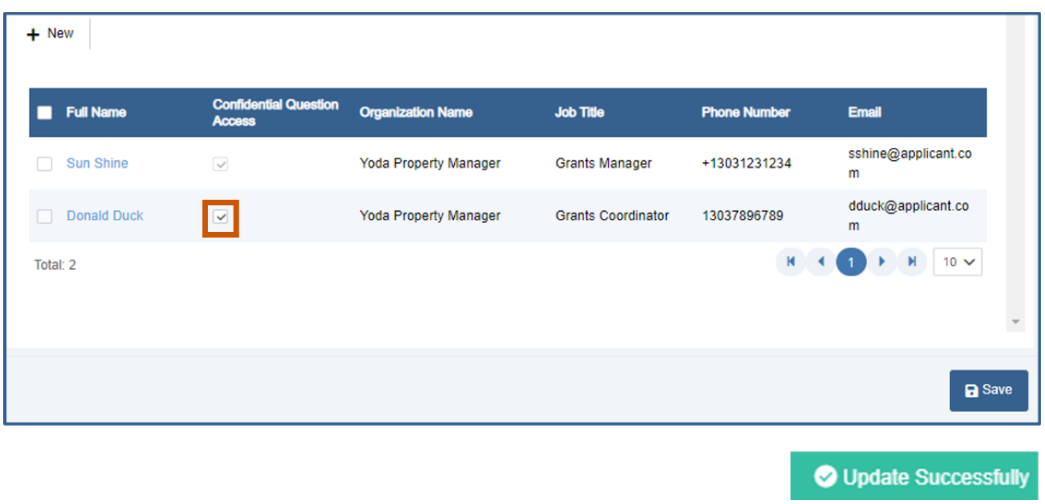


Figure 88: Give Confidential Access

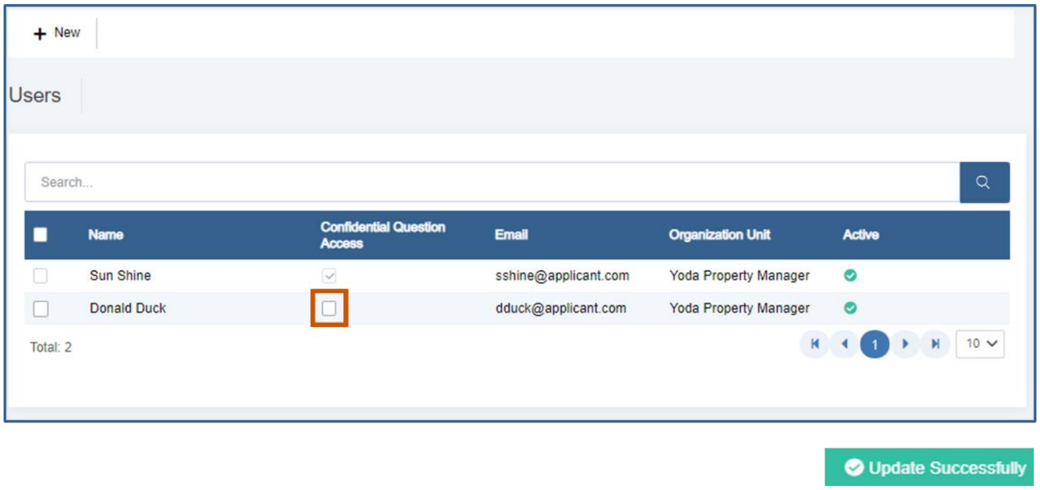


Figure 89: Deny Confidential Access

Edit a User

1. **Optional:** Use the search bar to find a user.
2. **Double-click** the user to edit it. The Edit User dialog box appears.

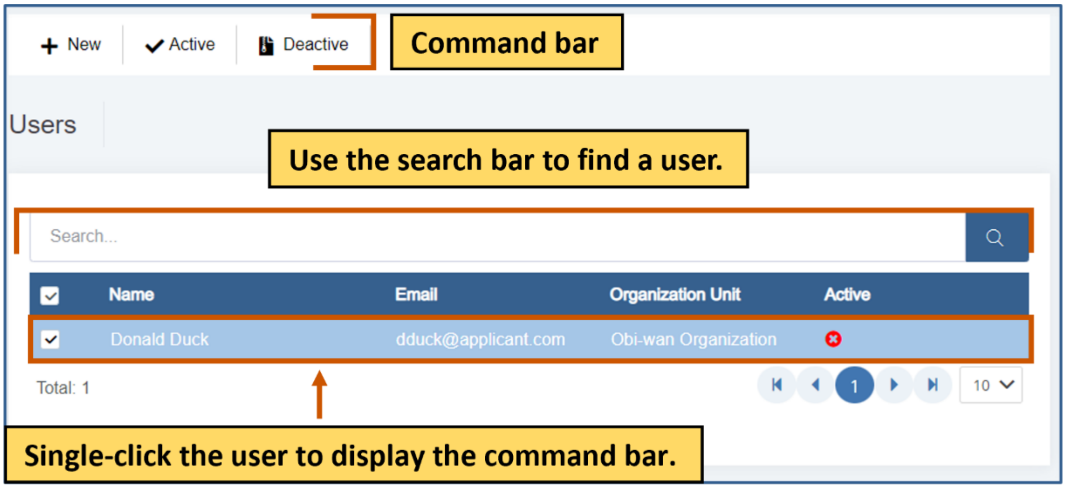


Figure 90: Display User Commands

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

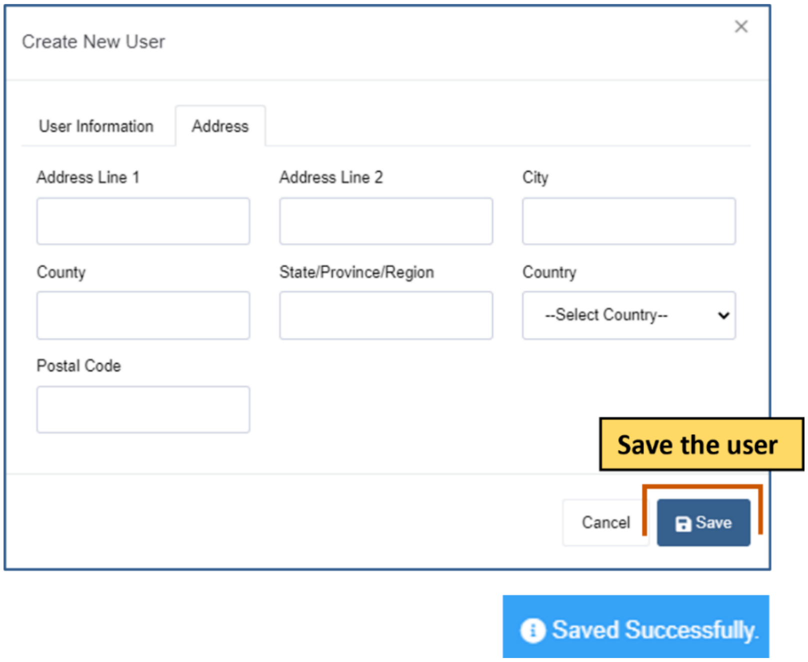


Figure 91: Create New User – Address Tab

Activate a User

You complete this action from both the Active Users and Inactive Users options from the sitemap.

1. **Optional:** Use the search bar to find a user.
2. **Single-click** the user to display the command bar.

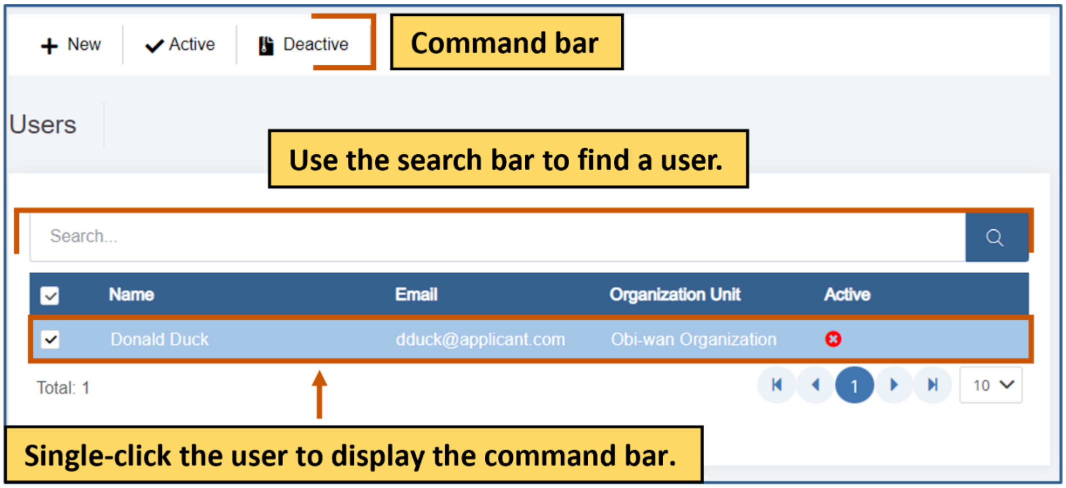


Figure 92: Display User Commands

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

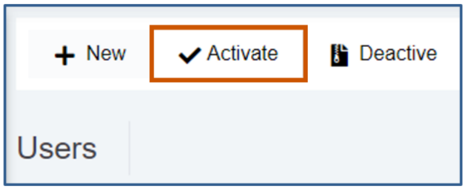


Figure 93: Activate User

4. Click **Yes.** The user is deactivated. A green Activated Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each user you wish to deactivate.

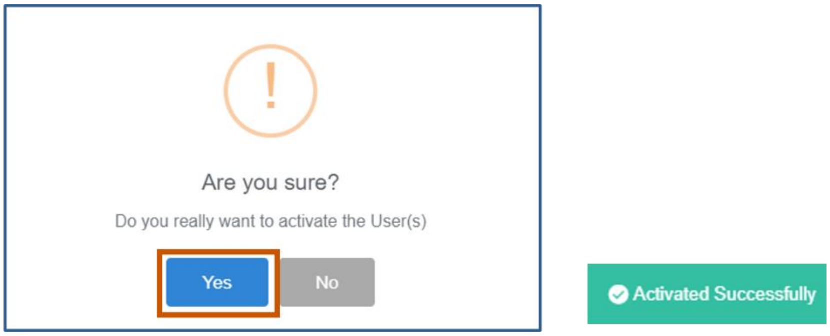


Figure 94: Warning to Activate User

Deactivate a User

You complete this action from both the Active Users and Inactive Users options from the sitemap.

1. **Optional:** Use the search bar to find a user.
2. **Single-Click** the user to display the command bar.

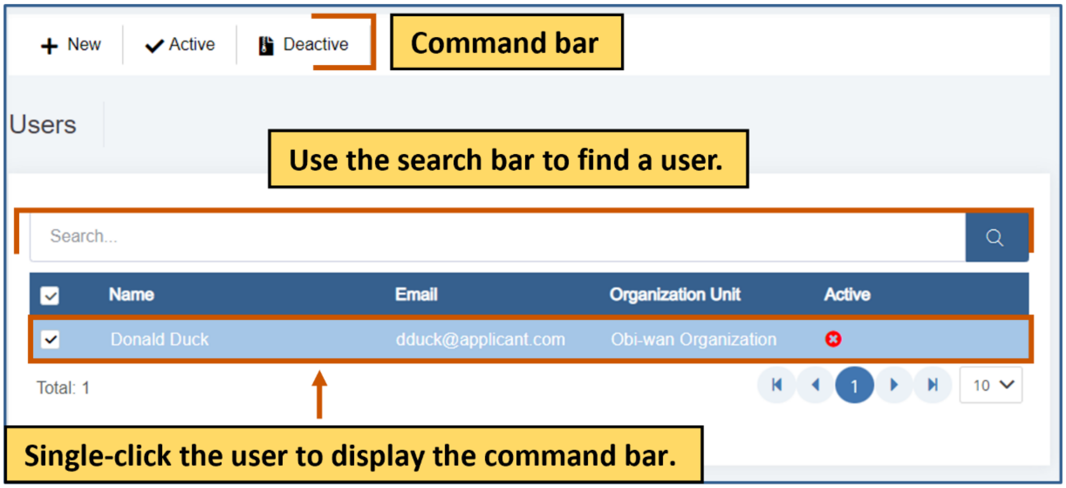


Figure 95: Display User Commands

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

Figure 96: Deactivate User

4. Click **Yes.** The reviewer is deactivated. A green Activated Successfully popup appears at the bottom right of the screen.Repeat steps 1-4 for each reviewer you wish to deactivate.

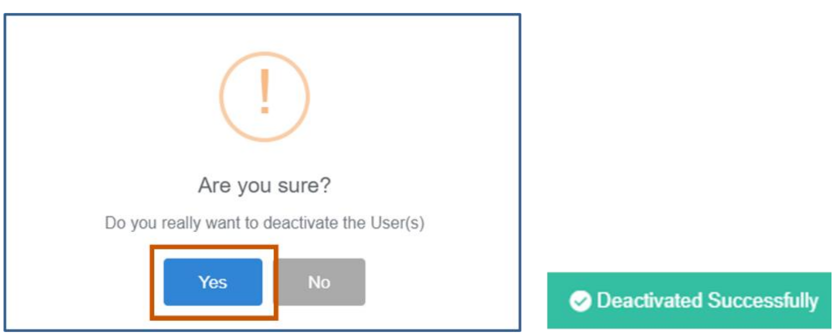


Figure 97: Warning to Activate User

Contacts

View the contacts related to the application.

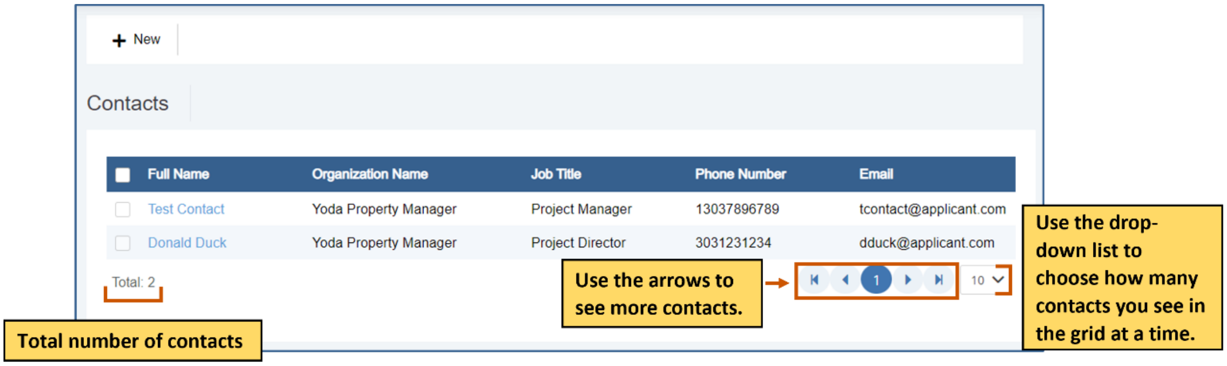


Figure 98: Contacts Screen

Add a Contact

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

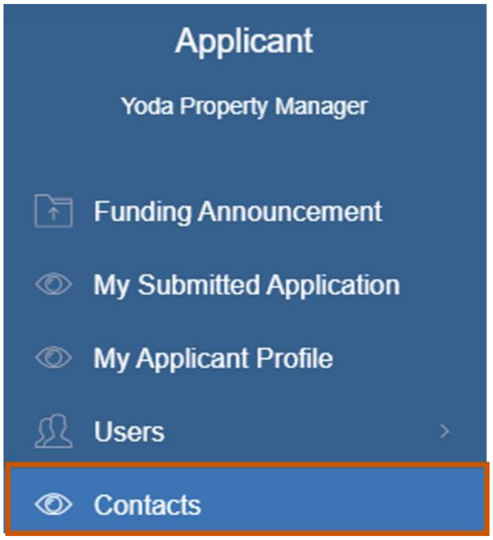


Figure 99: Site Map - Contacts

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

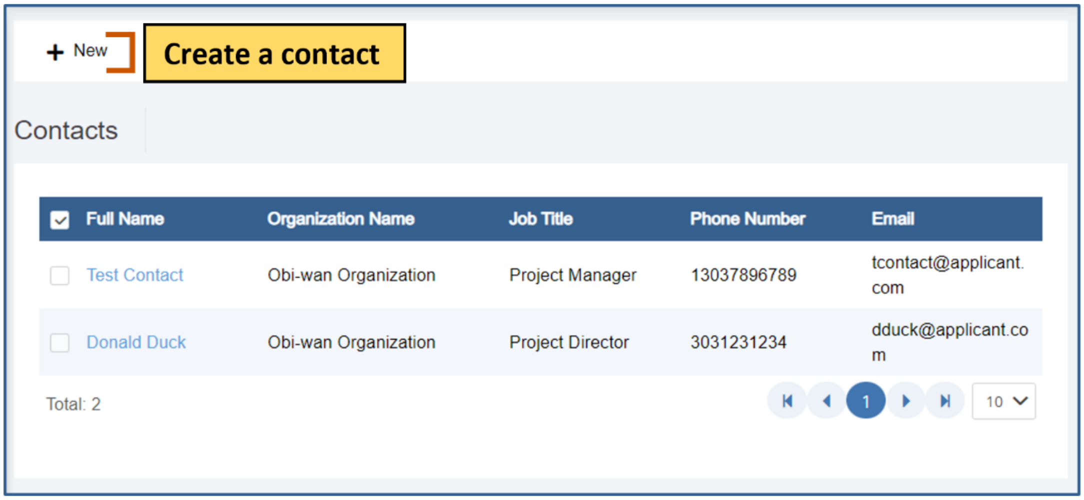


Figure 100: New Contact

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

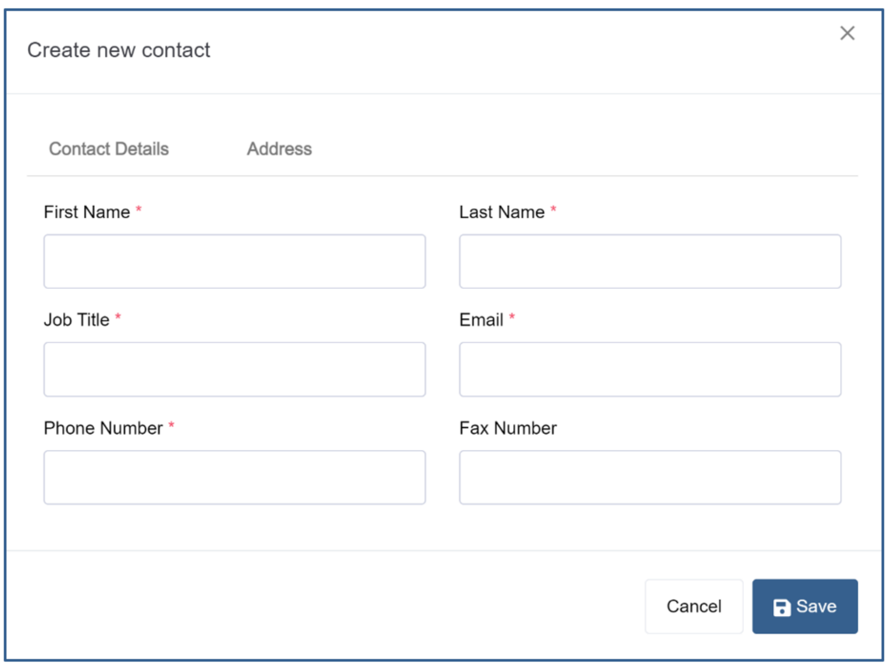


Figure 101: Create New Contact – Contact Details Tab

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

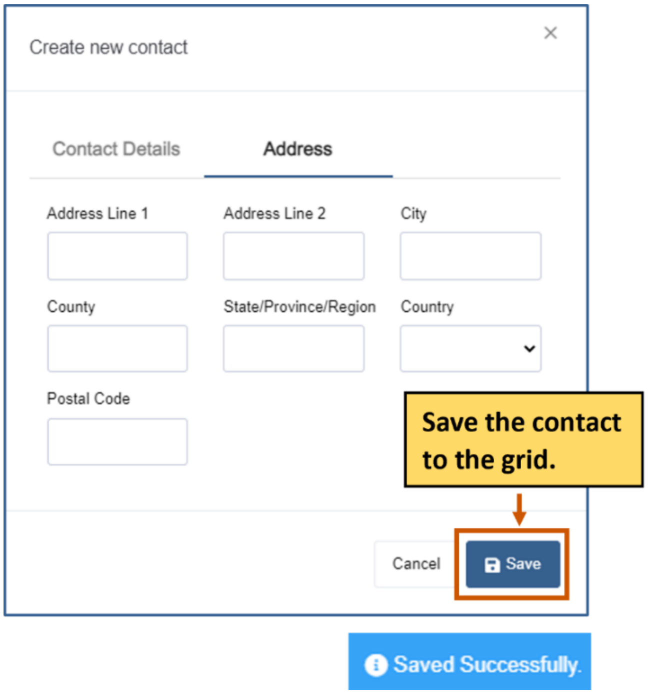


Figure 102: Create New Contact – Address Tab

Edit a Contact

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

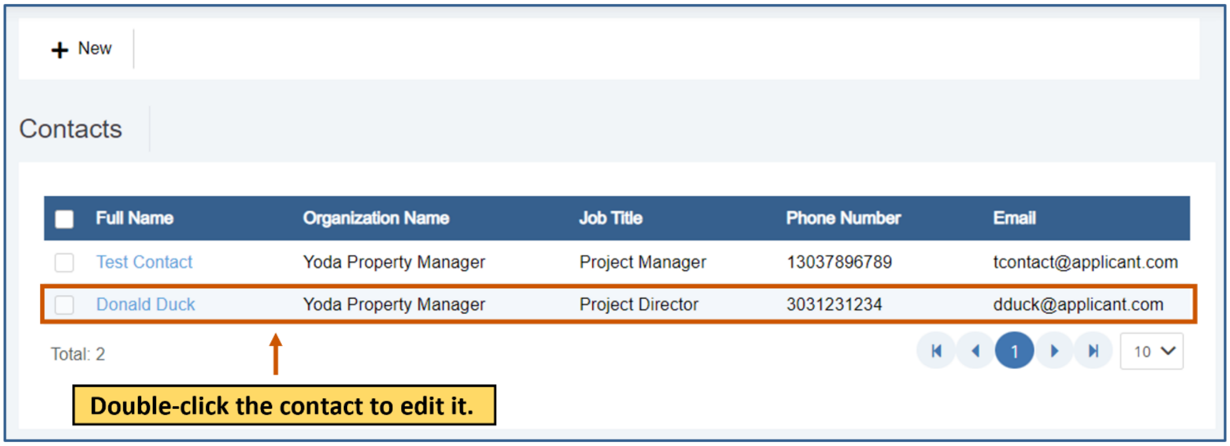


Figure 103: Edit Contact

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

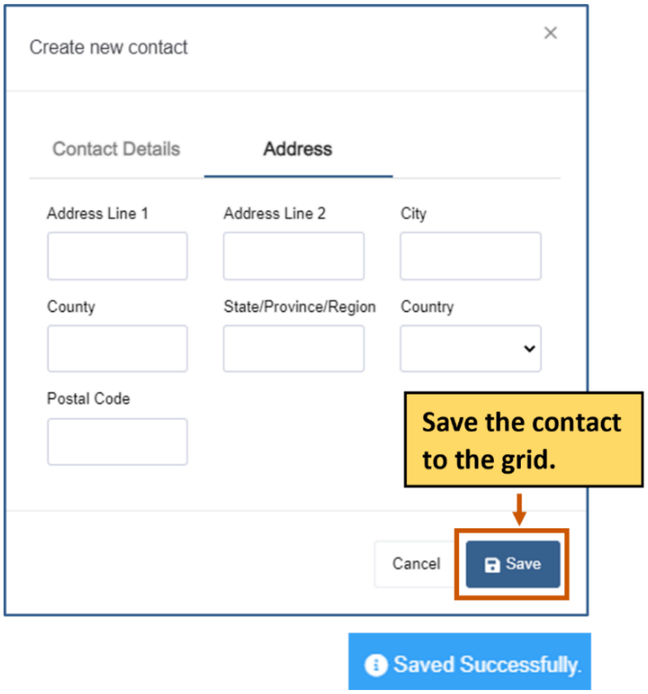


Figure 104: Create New Contact – Address Tab

Delete a Contact

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

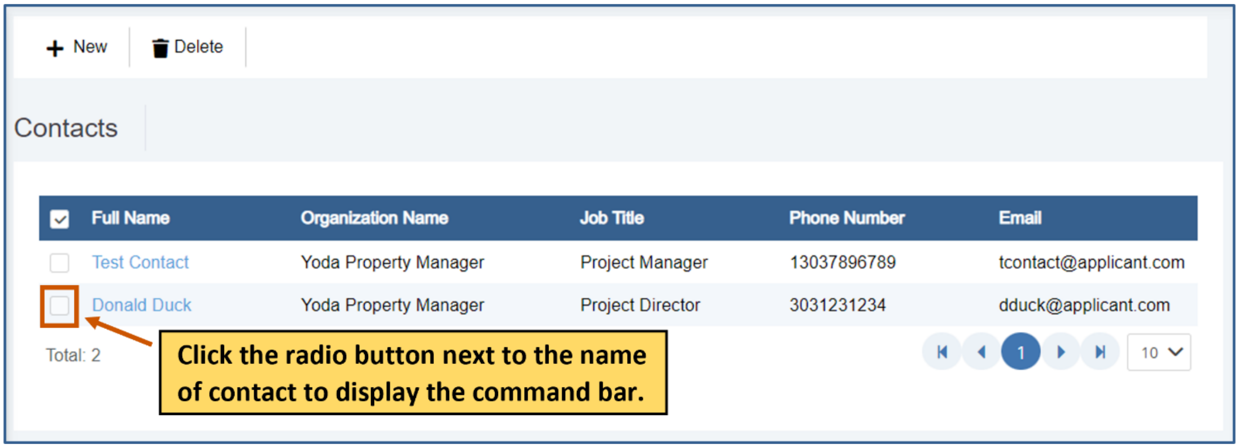


Figure 105: Click Contact

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

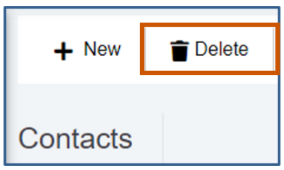


Figure 106: Delete Contact

3. Click **Yes.** The contact is deleted. A green Deleted Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each contact you wish to delete.

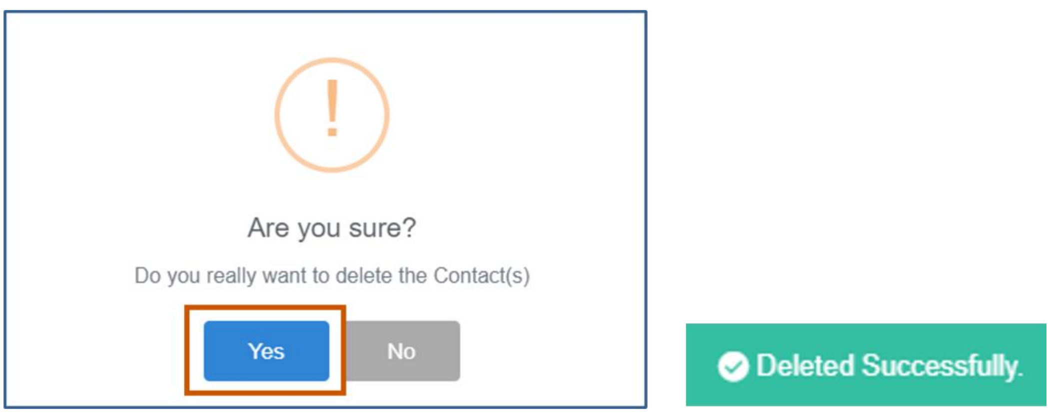


Figure 107: Warning to Delete Contact

Documents

View documents related to the application.

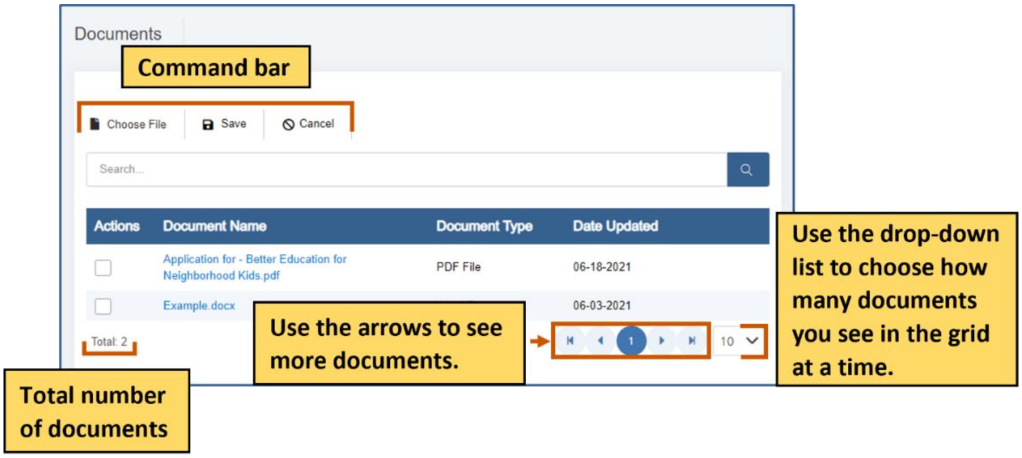


Figure 108: Documents Screen

Primary Applicant and Applicant Delegate – Confidential vs. Applicant Delegate – Standard Users

Primary applicants and Applicant Delegate – Confidential users can choose to mark documents as confidential. Applicant Delegate – Standard users do not have the option to mark documents as confidential. Confidential documents are not visible for Applicant Delegate – Standard users.

Primary Applicant and Applicant Delegate – Confidential User Commands

Command Options	Description
Choose File	Choose the file you want to upload.
Confidential Document	Mark a document as confidential. Only primary applicants and Applicant Delegate – Confidential users can use this feature. Confidential documents are marked with a lock and are not seen by Applicant Delegate – Standard users.
Save	Save the file you want to upload.
Cancel	If you choose a file you do not want to upload, you can cancel uploading the file.

Table 3: Document Command Options

Applicant Delegate – Standard User Commands

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

Table 4: Document Command Options

Add a Document

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

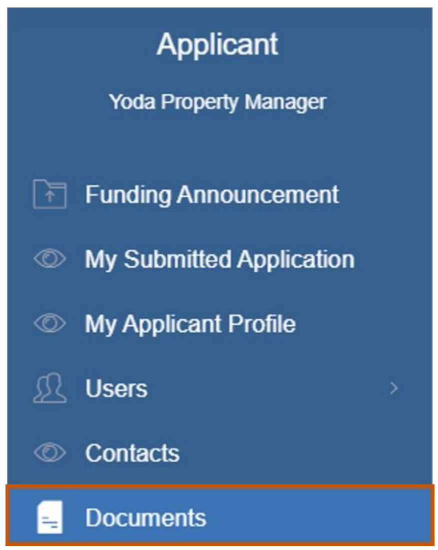


Figure 109: Site Map - Documents

2. **Optional:** Click the Confidential Document radio button to mark the document as confidential.

   Tip: If you are a primary applicant or an Applicant Delegate – Confidential user, you can choose to mark documents as confidential. If you are an Applicant Delegate – Standard user, you do not have the option to mark documents as confidential. Confidential documents are marked with a lock. Confidential documents do not show up in the grid for Applicant Delegate – Standard users. Marking documents as confidential is not necessary to complete this step.

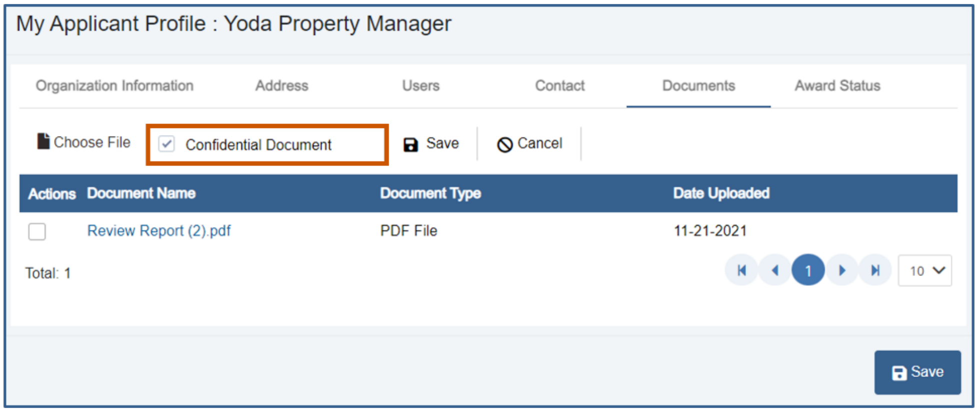


Figure 110: Mark Document as Confidential

3. Click **Choose File.**
4. Upload the file. The name of the file replaces the Choose File button.

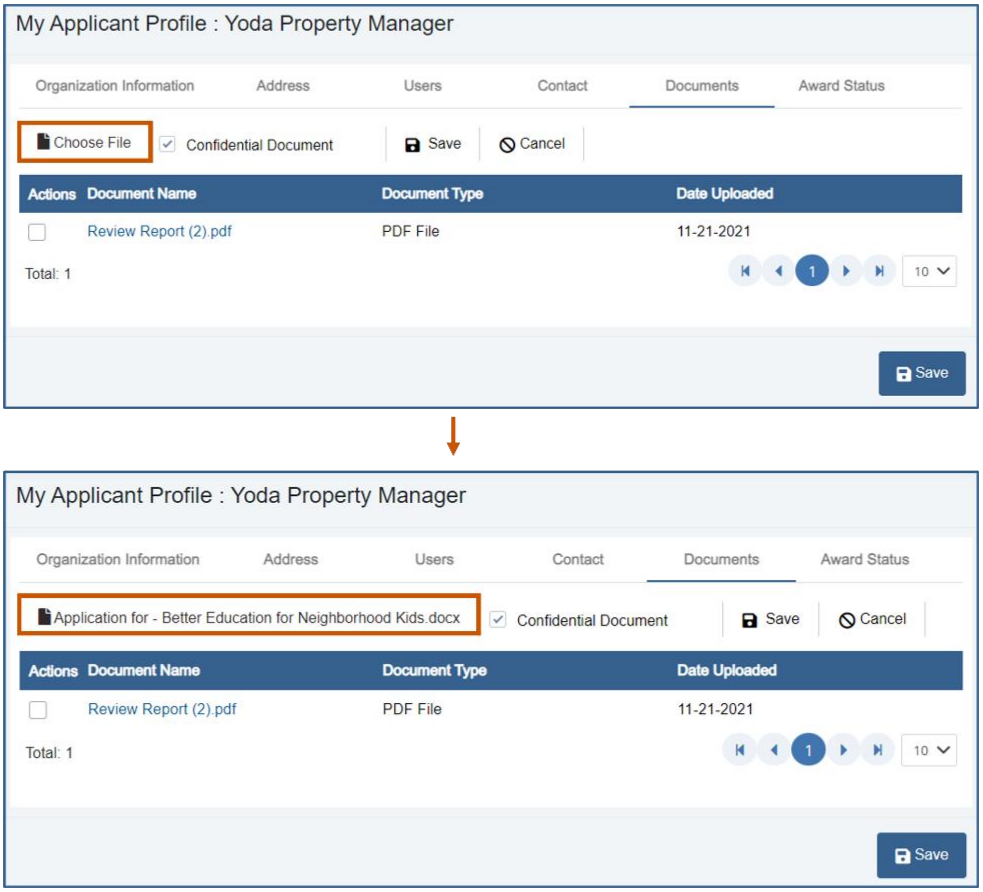


Figure 111: Add Attachment to Profile

5. Click **Save** to save the document to the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 3-5 for each document.

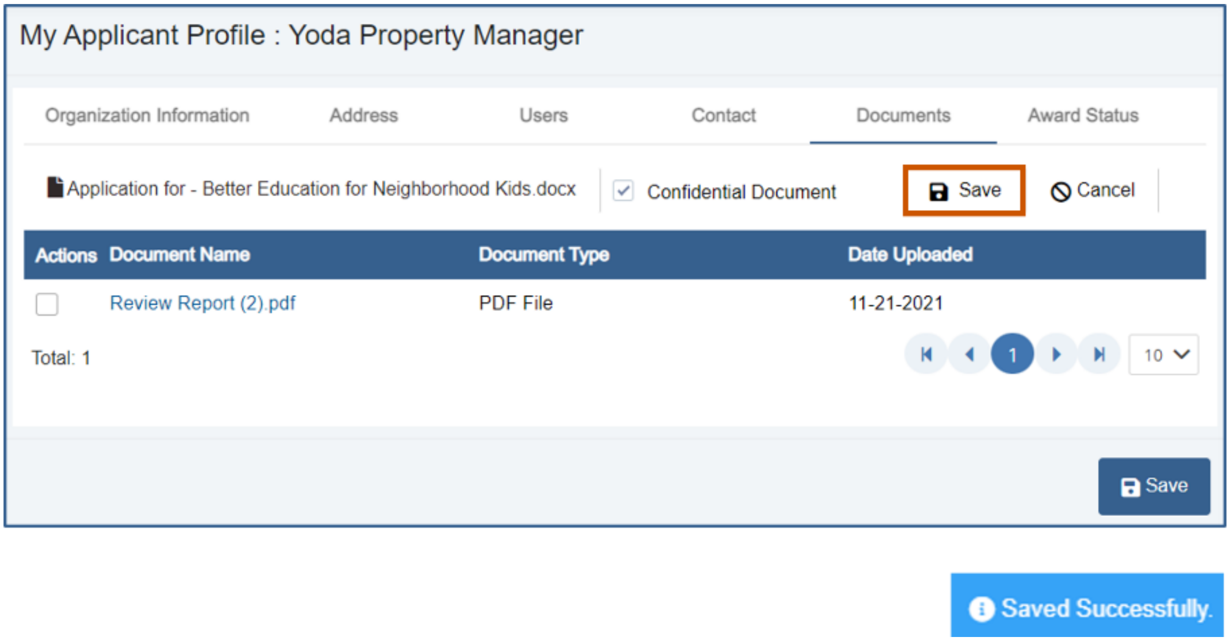


Figure 112: Save Attachment to Profile

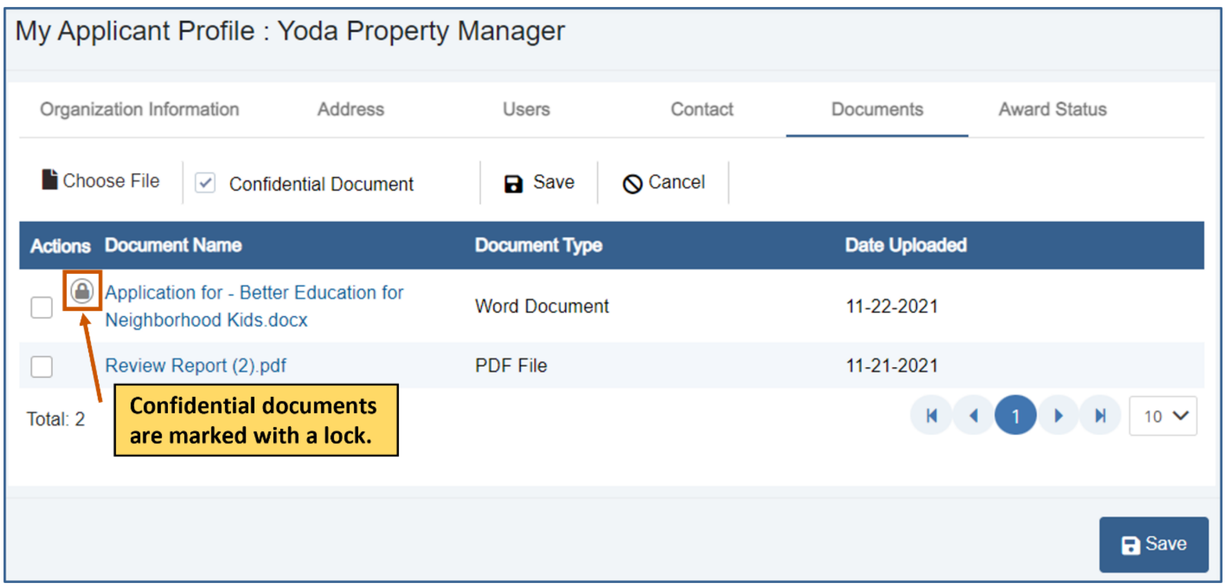


Figure 113: Confidential Document

Delete a Document

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

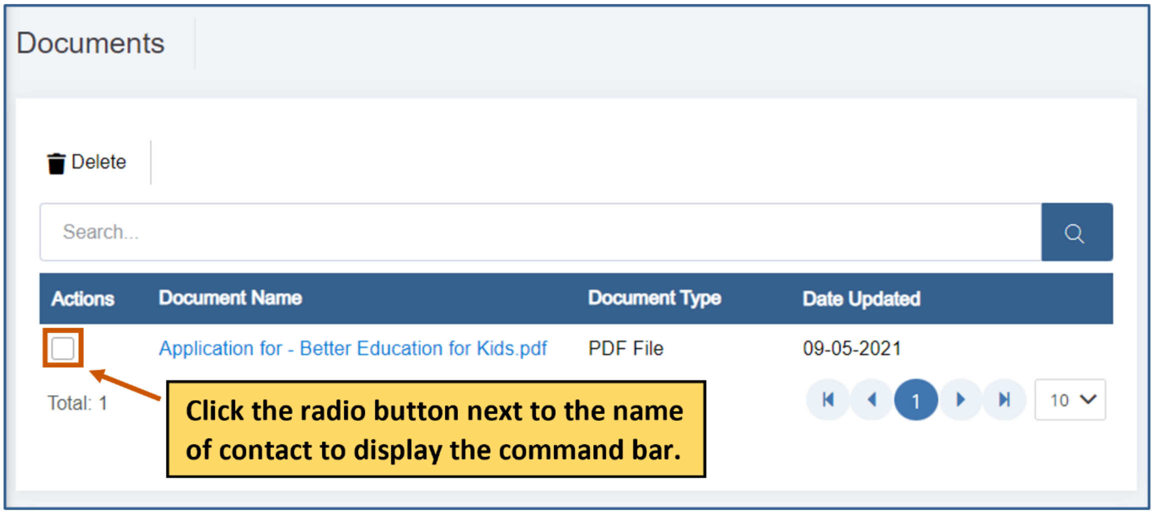


Figure 114: Click Document

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

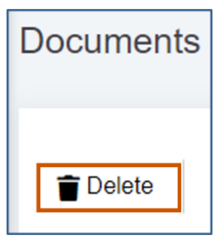


Figure 115: Delete Document

3. Click **Yes.** The document is deleted. A green Deleted Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each document you wish to delete.

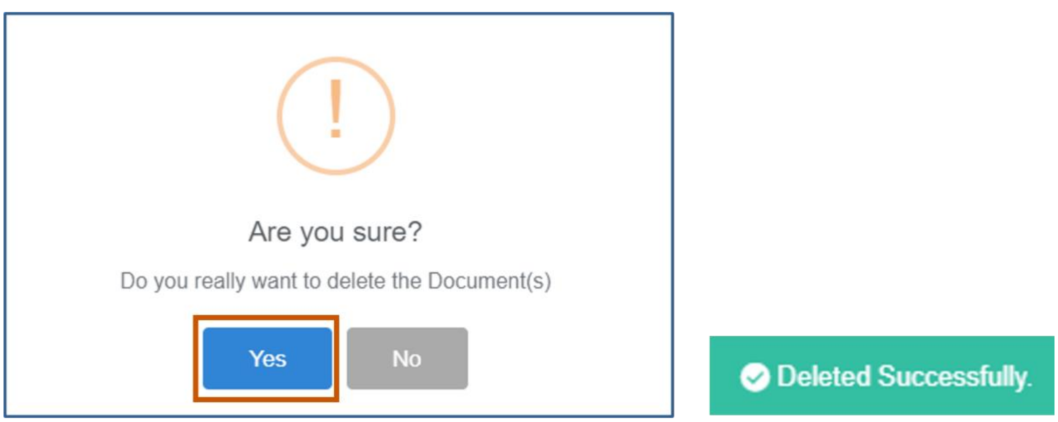


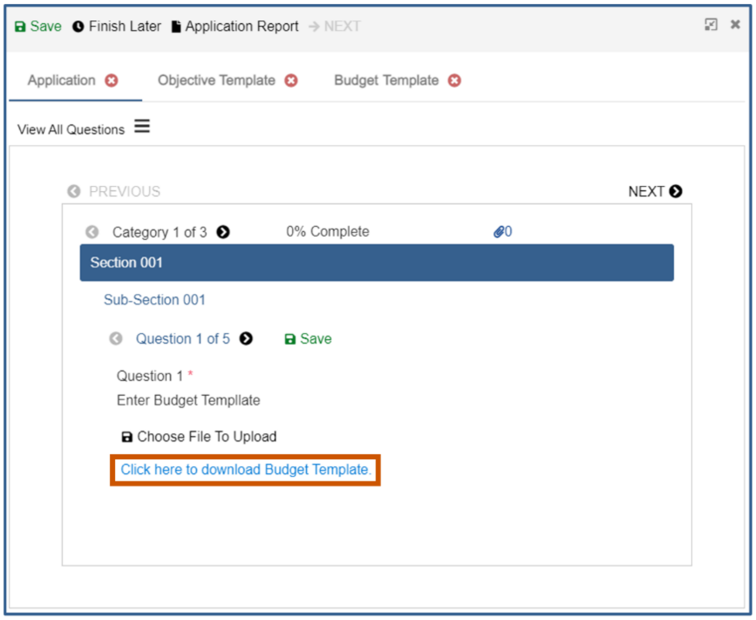
Figure 116: Warning to Delete Document

Applicant Question Types

Attachment – Budget Template

To complete this question, add an attachment of the Budget Template.

1. If necessary, click “**Click here to download Budget Template”.**
2. Fill in the Budget Template.



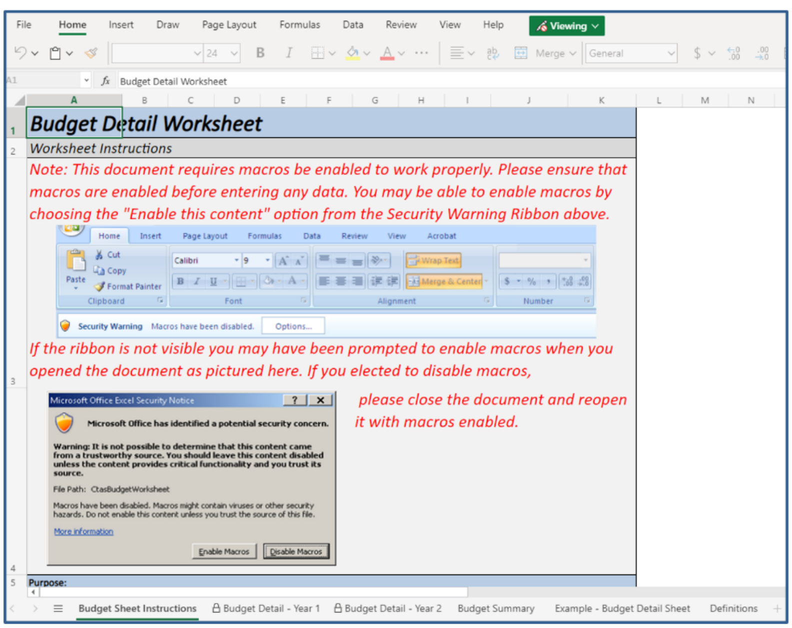


Figure 117: Download Budget Template

3. Click **Choose File to Upload.**
4. Choose from grid.
   Or
   Click **Choose File.**
   a. Upload the document.
   b. Click **Save.**
5. Click **Save.**

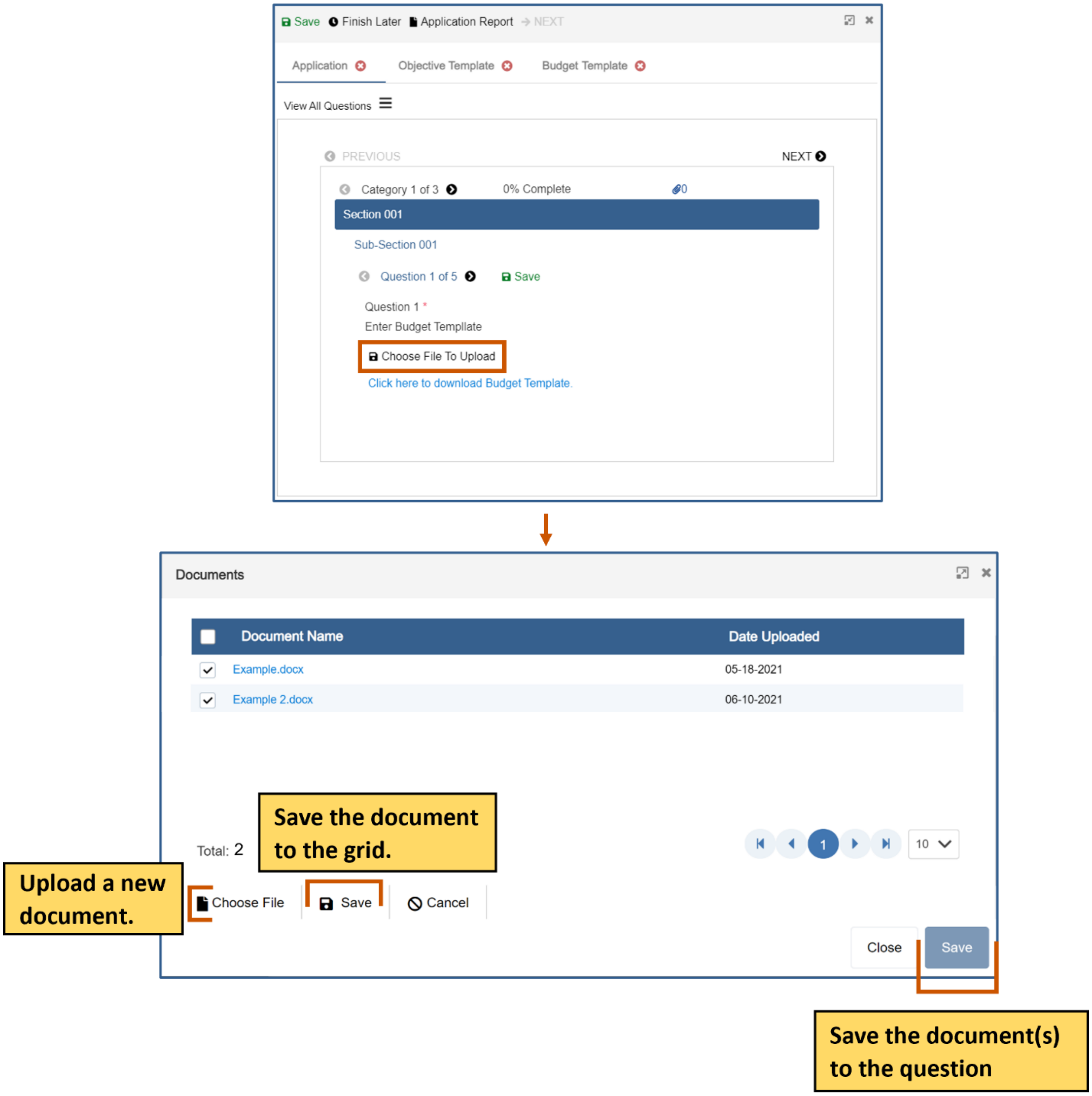


Figure 118: Upload Budget Template

Attachment – Other

To complete this question, add an attachment.

1. Click **Choose File to Upload.**
2. Choose from grid.
   Or
   Click **Choose File.**
   a. Upload the document.
   b. Click **Save.**
3. Click **Save.**

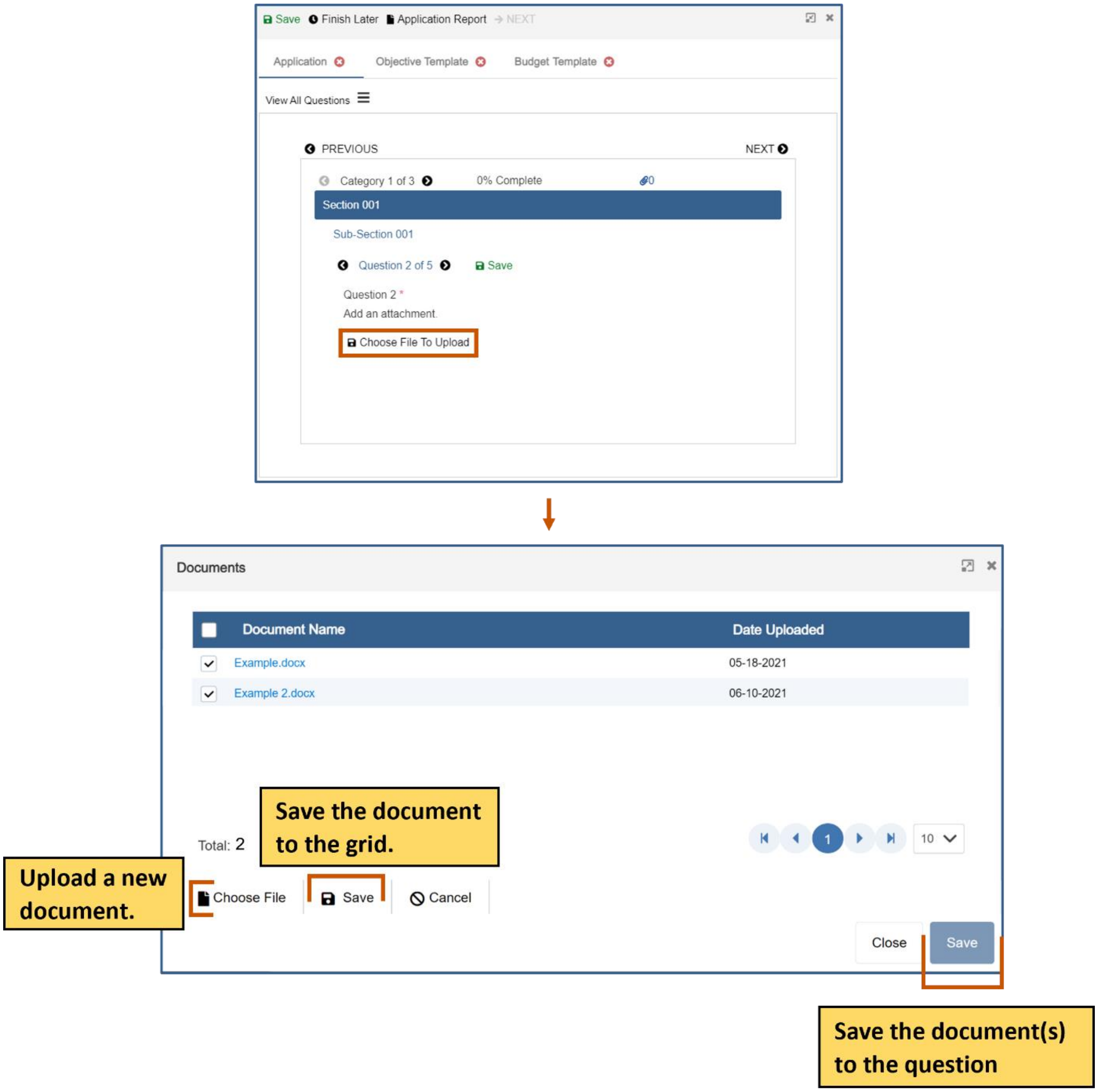


Figure 119: Add Attachment

Checklist

To complete this question, choose from the checklist. You can choose the options that best answer the question. This is a multi-select dropdown and users must select the checkbox next to the option to select.

1. Use the drop-down list to choose from the checklist.

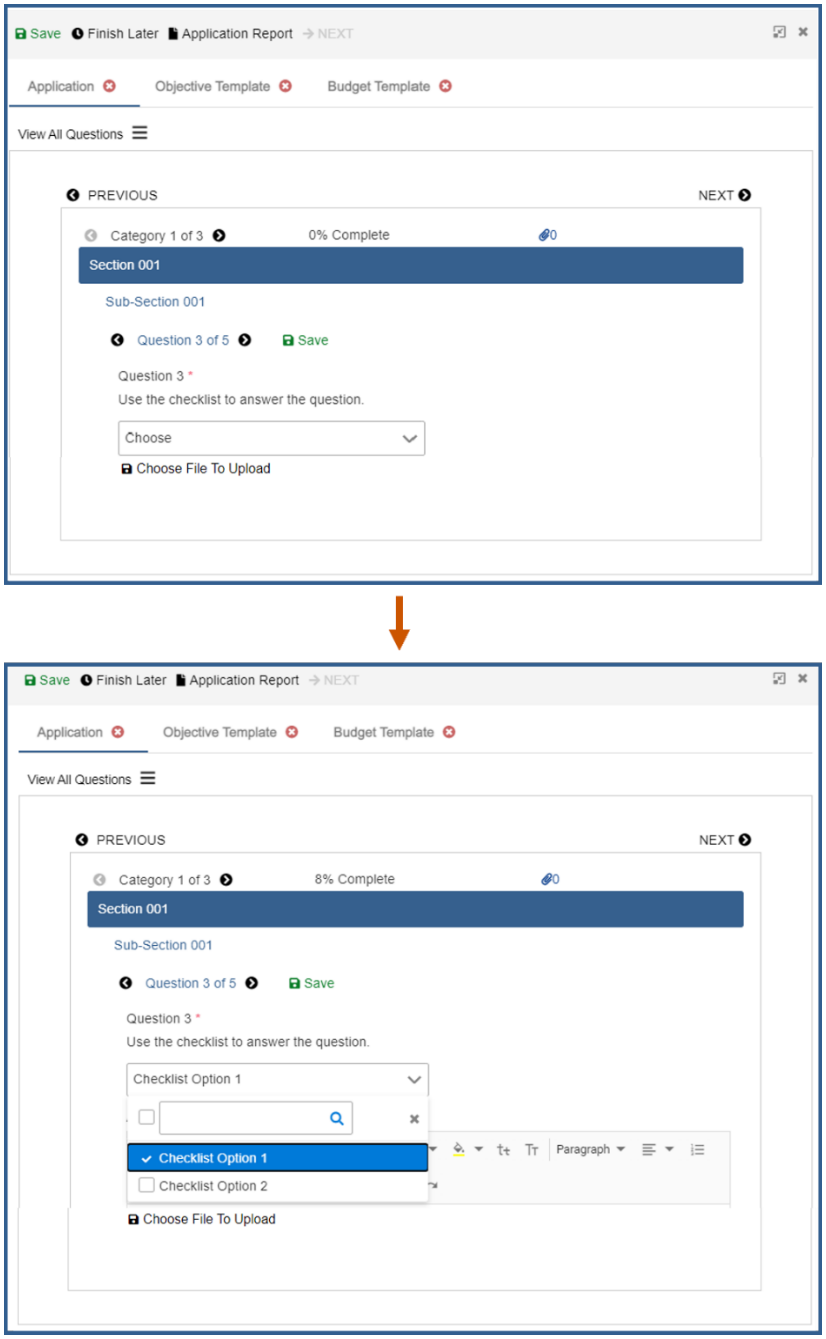


Figure 120: Choose from Checklist

Contact Lookup

To complete this question, lookup a contact. Contacts are created in the Applicant Profile in the Contacts Section or can be created by selecting the **+** on the Contact Lookup field.

Add an Existing Contact

1. Click **Search** . The Pick Contact dialog box appears.
2. Click **Select** next to the contact's name. The contact's name appears in the Contact Lookup Field.

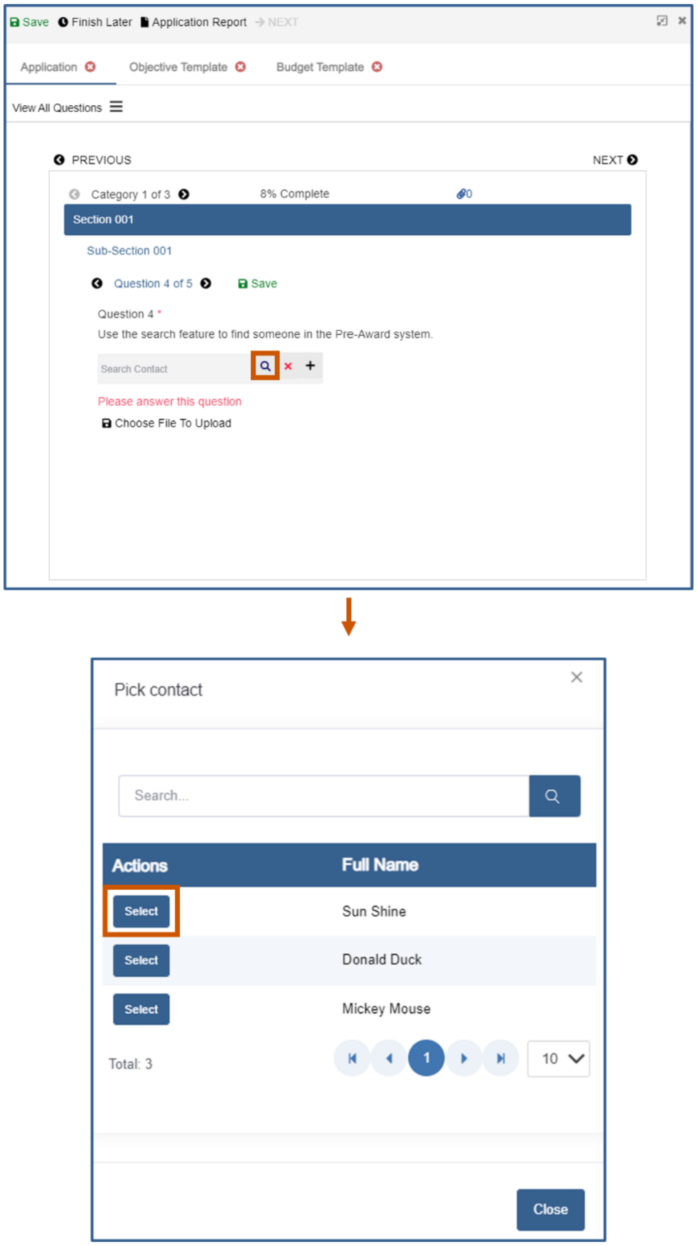


Figure 121: Search Contact

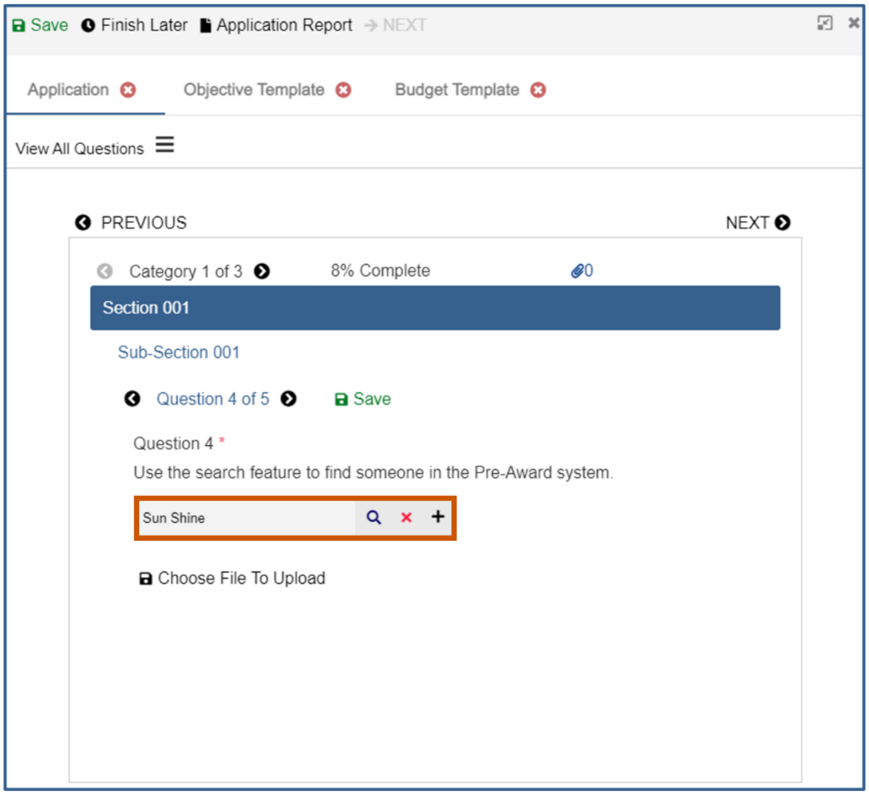


Figure 122: Contact Name in Answer Field

Add a New Contact

1. Click **New** ✚**.** The Create New Contact dialog box appears.
2. Fill in the necessary fields.
   Note: The red asterisks indicate required fields.
3. Click **Save.** The contact's name appears in the Contact Lookup Field.

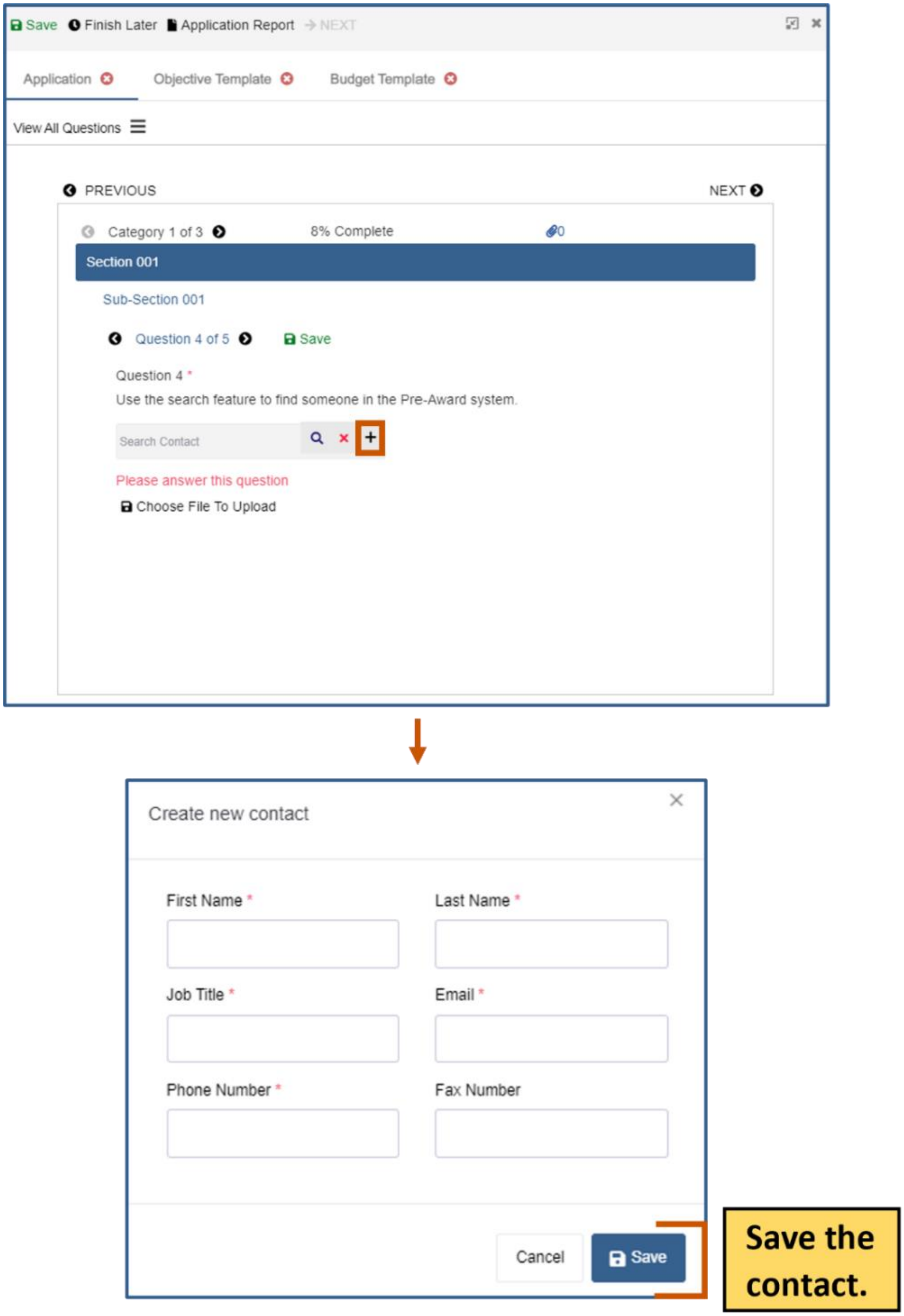


Figure 123: Create New Contact Question

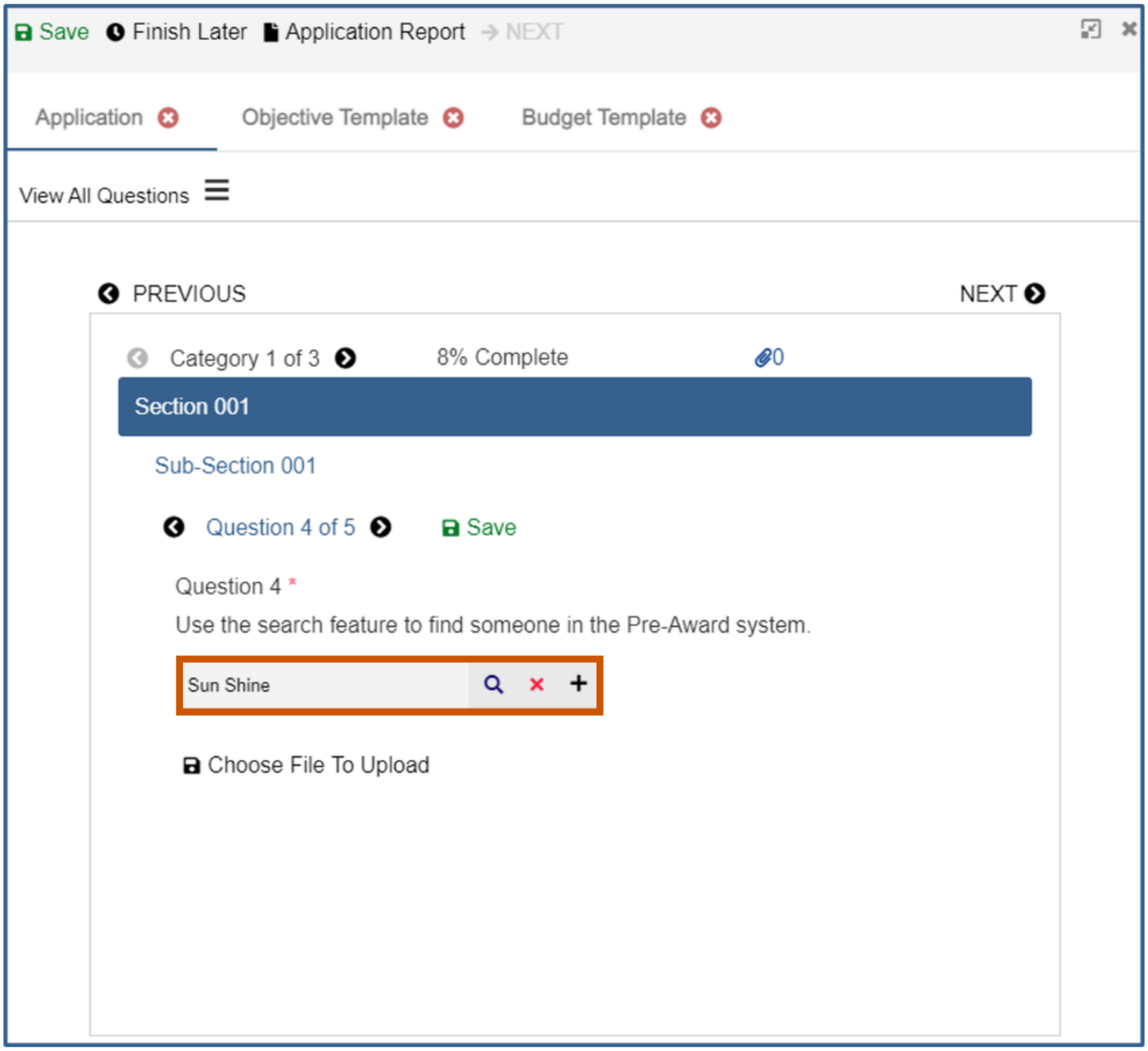


Figure 124: New Contact Name in Answer Field

Date

To complete this question, input a date. For example, 12/01/2021.

ⓘ **Note:** The date fields are displayed in the mm/dd/yyyy format. You can manually type in a date or use the calendar.

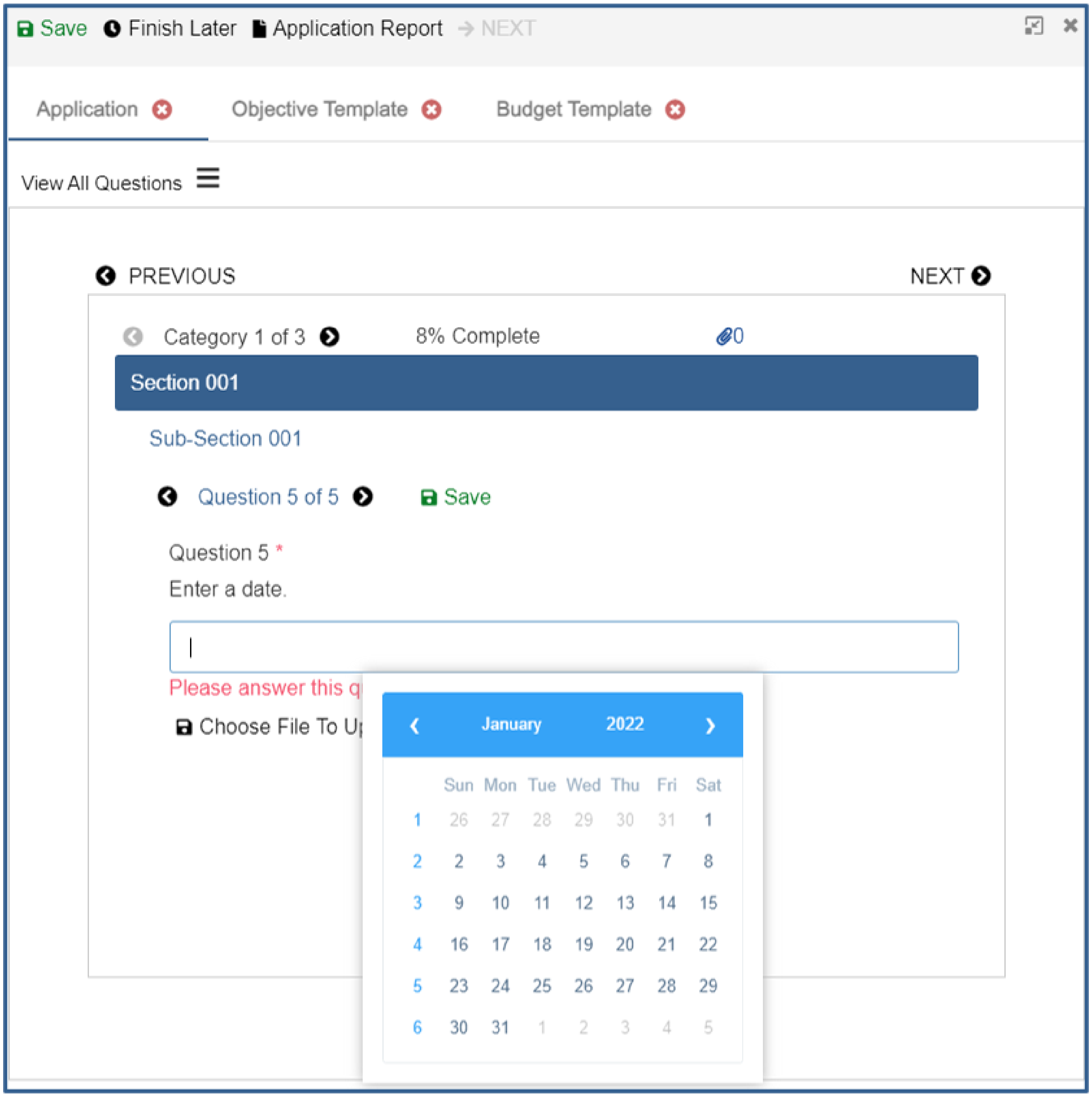


Figure 125: Choose Date

Date Range

To complete this question, input a date range. For example, 12/01/2021 – 11/30/2022.

Note: The date fields are displayed in the mm/dd/yyyy format. You can manually type in a date or use the calendar.

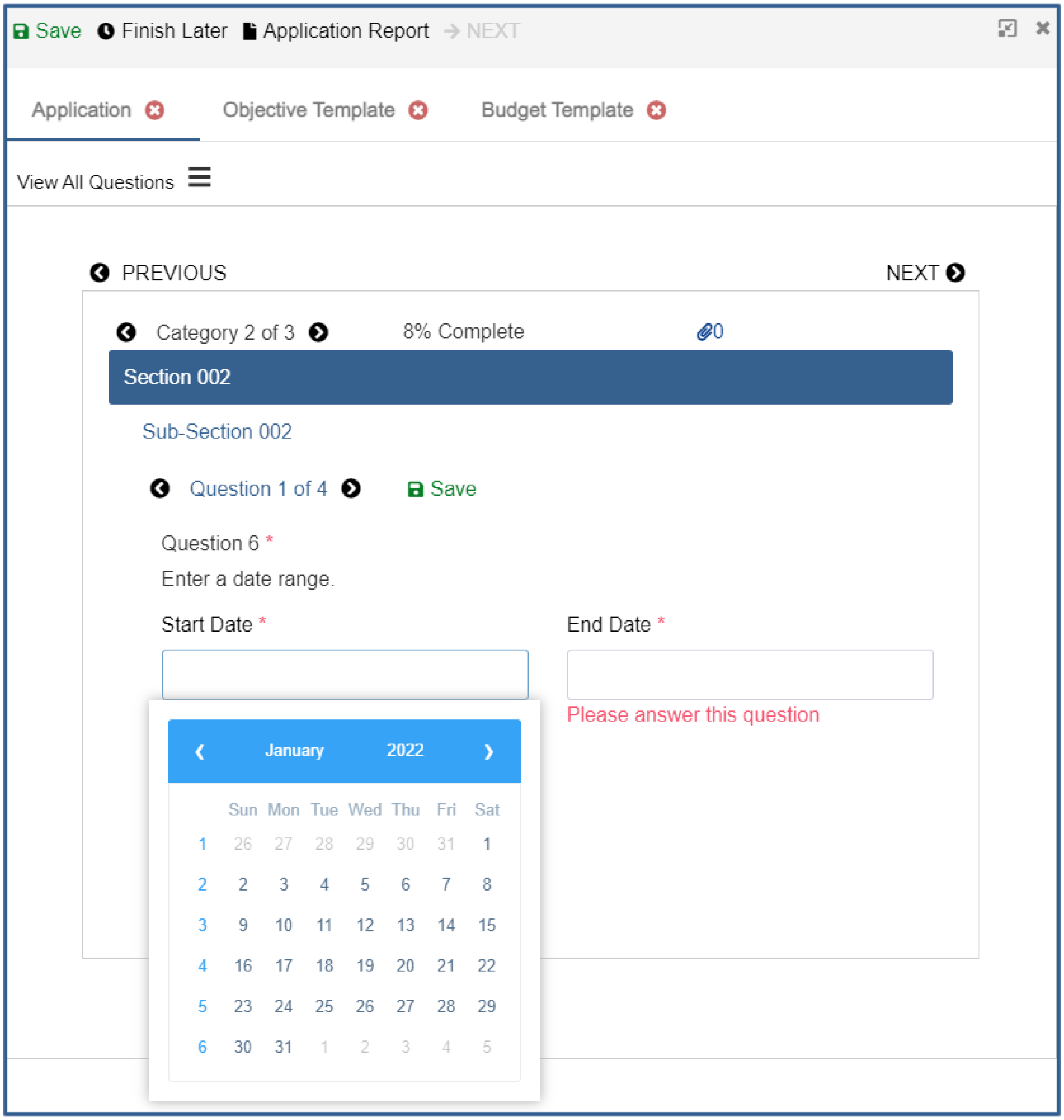


Figure 126: Choose Date Range

Decimal Number

To complete this question, input a decimal number.

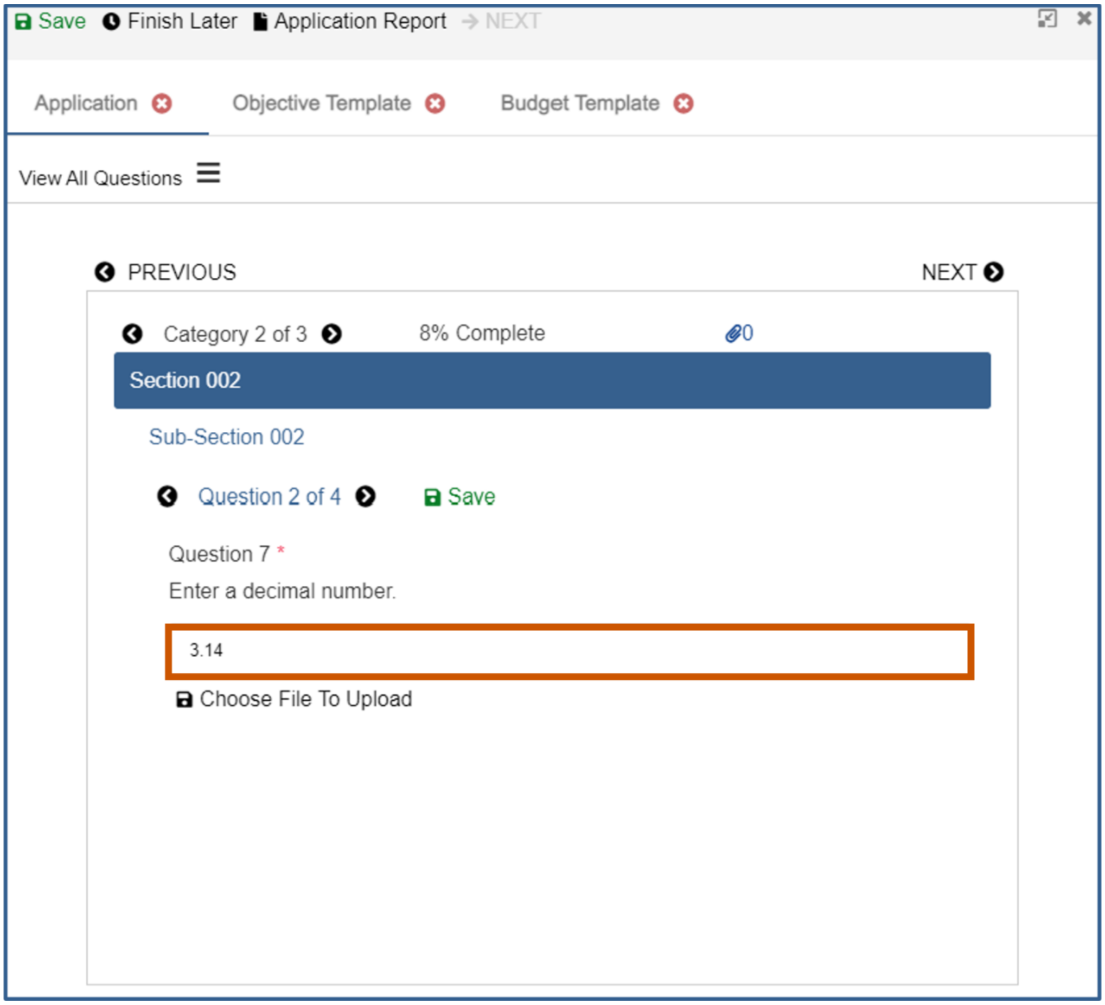


Figure 127: Enter Decimal

Formatted Text

To complete this question, input text. Narrative fields may have a character limit that will display the maximum number of characters an applicant response may contain. The character limit will count down until it reaches zero (0), and the system will not allow you to continue typing. If there is no character limit it will be indicated by a double dash (--).

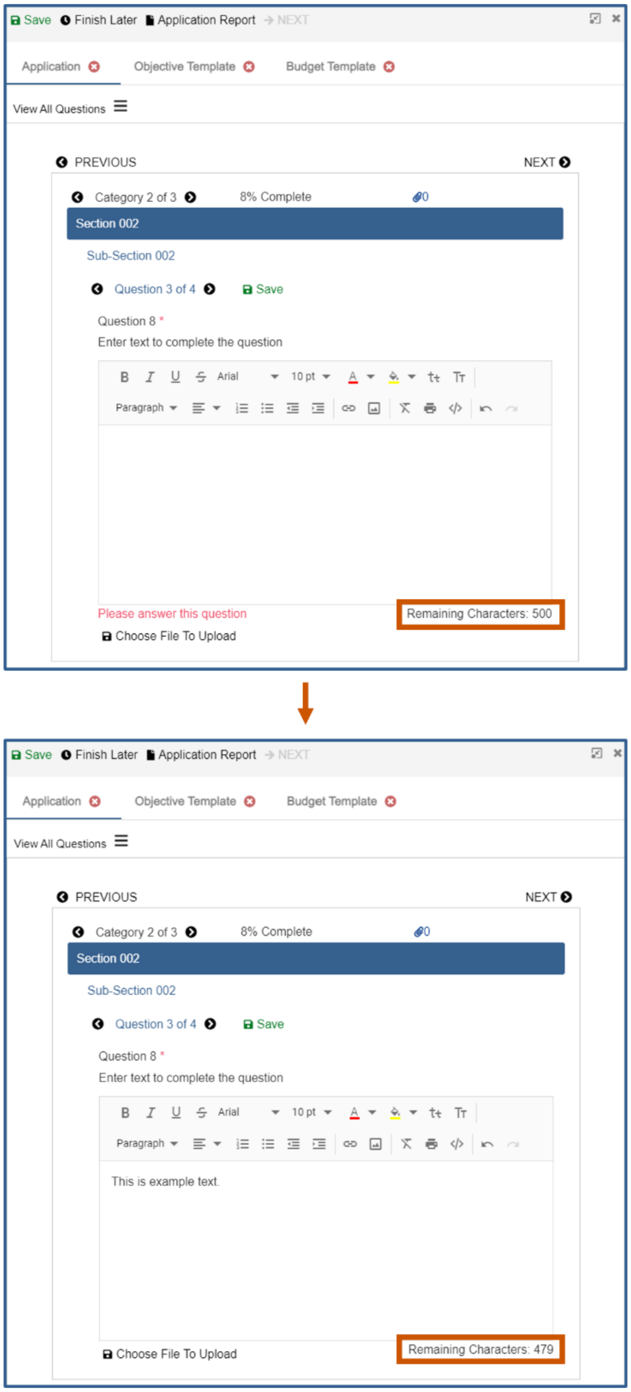


Figure 128: Formatted Text Character Limit

Grid – Fixed Row

To complete this question, complete the grid. You cannot add or delete fixed rows. Fields may be Date, Number, Currency, or Limited Text. Number and Currency columns may have a Total or Average section at the bottom.

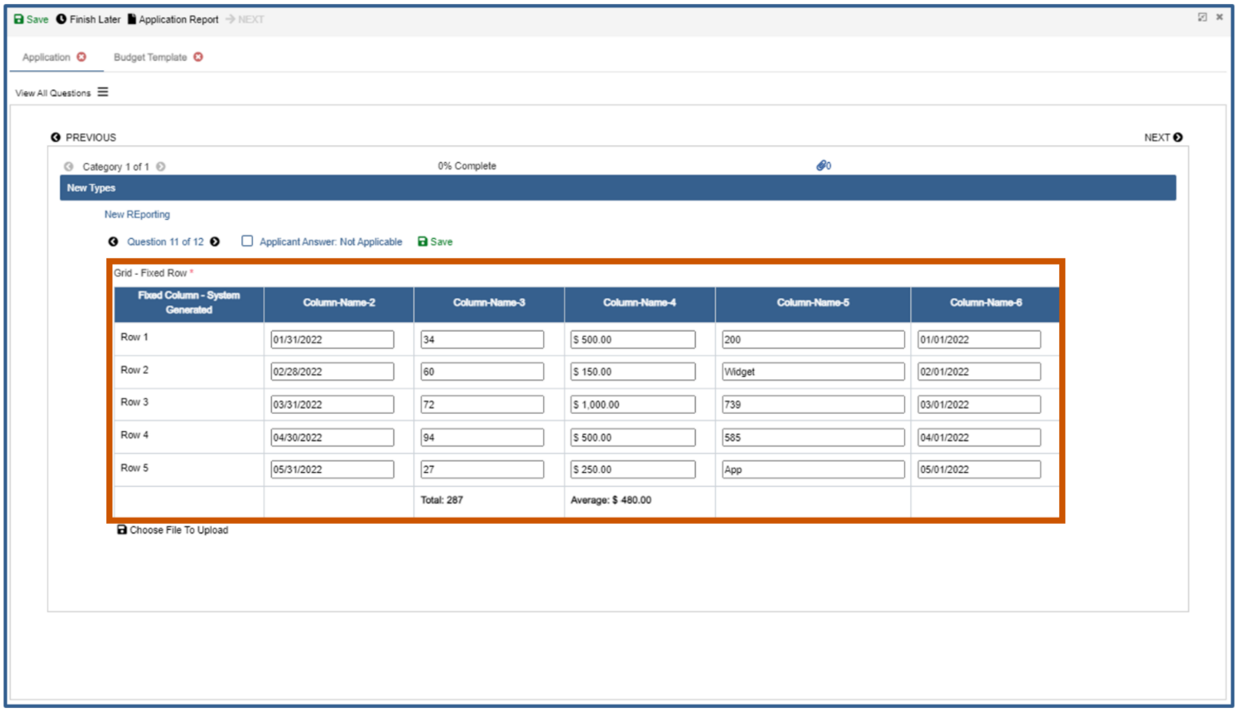
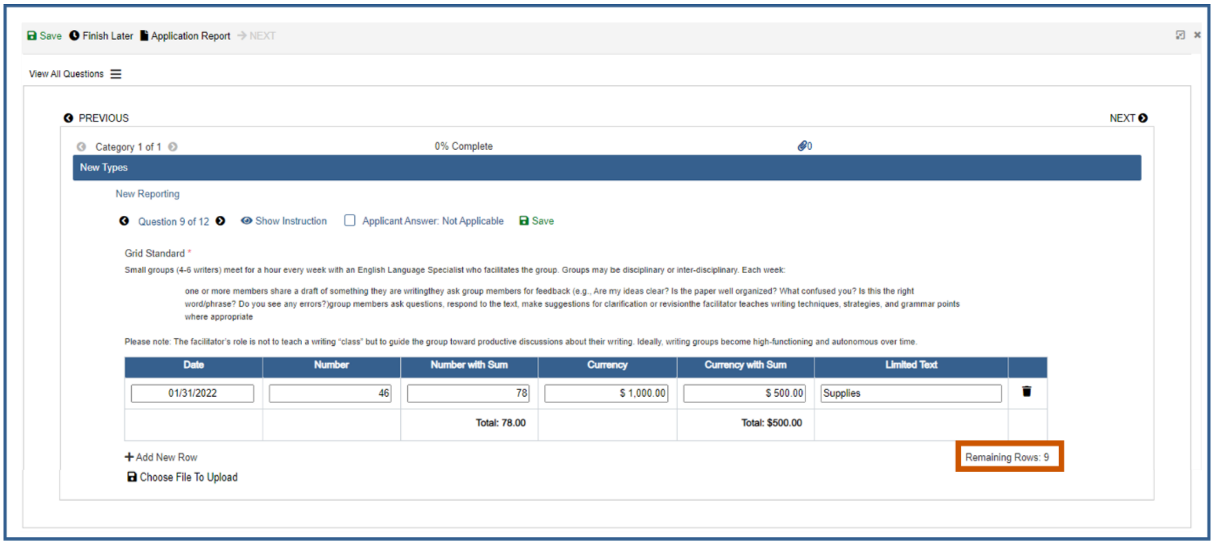


Figure 129: Grid – Fixed Row

Grid - Standard

To complete this question, add or delete rows and complete the grid. Fields may be Date, Number, Currency, or Limited Text. Number and Currency columns may have a Total or Average section at the bottom.



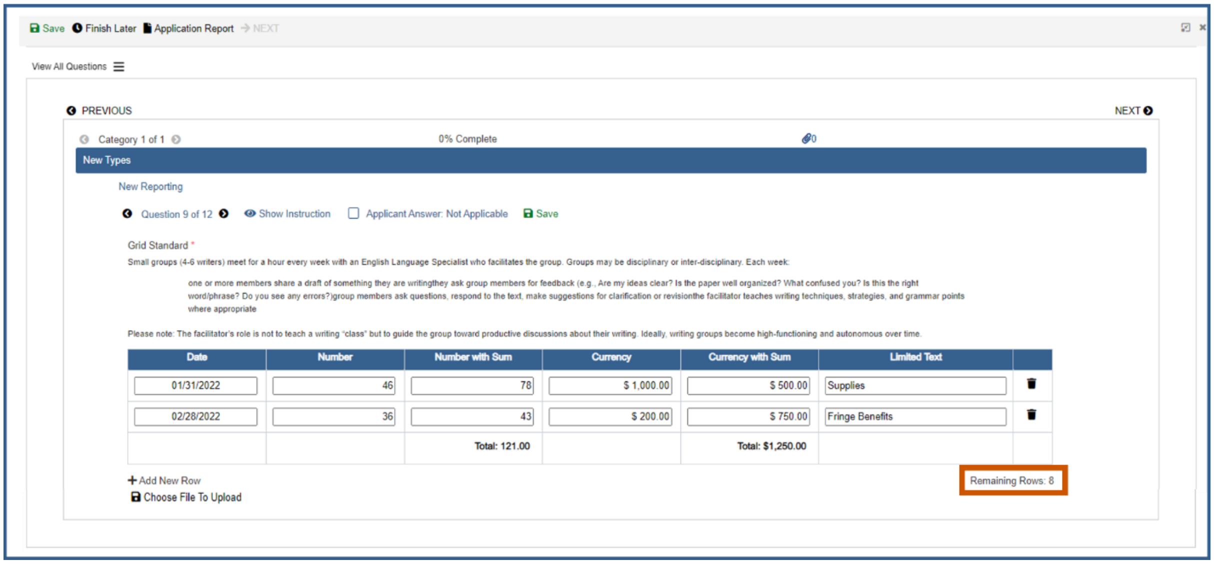
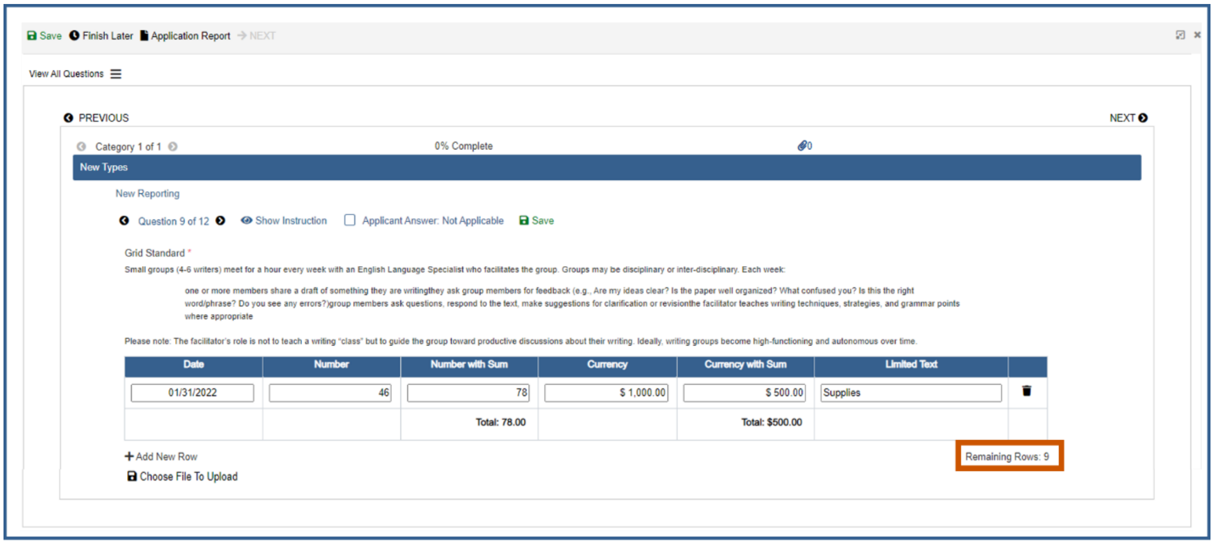


Figure 130: Grid – Standard

Add a Row

1. Click ➕ **Add New Row.**
2. Fill in the rows. Repeat steps 1-2 for each row.
   ⓘ **Note:** If there is a row limit, it will display with the Remaining Row indicator. It counts down until you reach the limit. The system will not let you add more rows past the limit. Otherwise, there is no row limit.



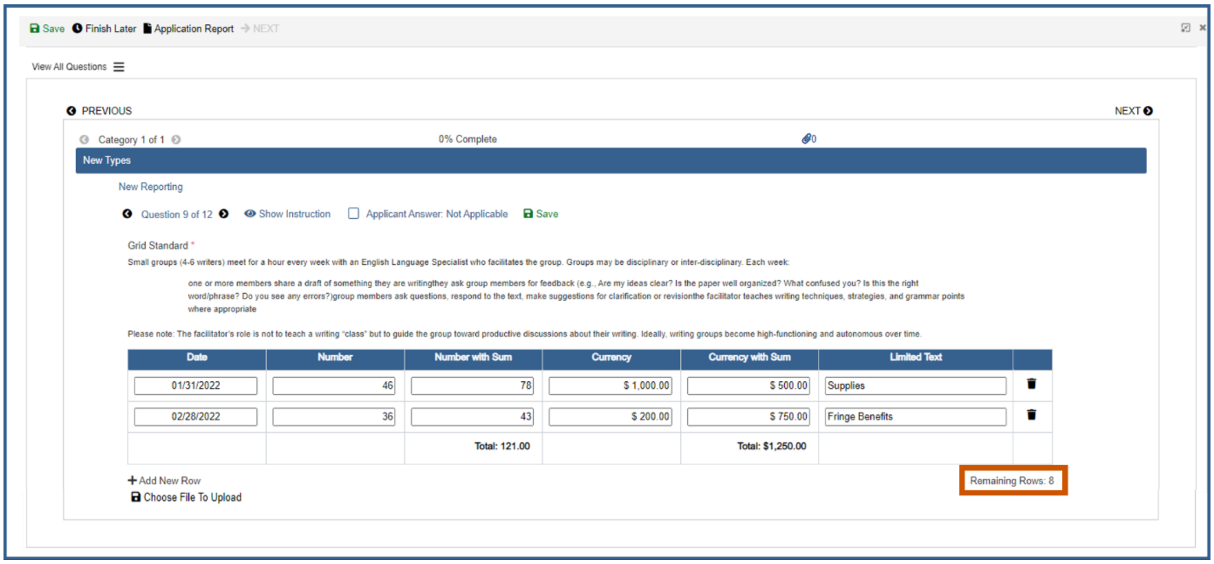


Figure 131: Grid – Standard

Grouped Questions

To complete this question, answer the grouped questions. Fields may be Date, Number, Currency, or Limited Text.

Note: If the 'N/A' option is selected, the question is greyed-out and does not require an answer.

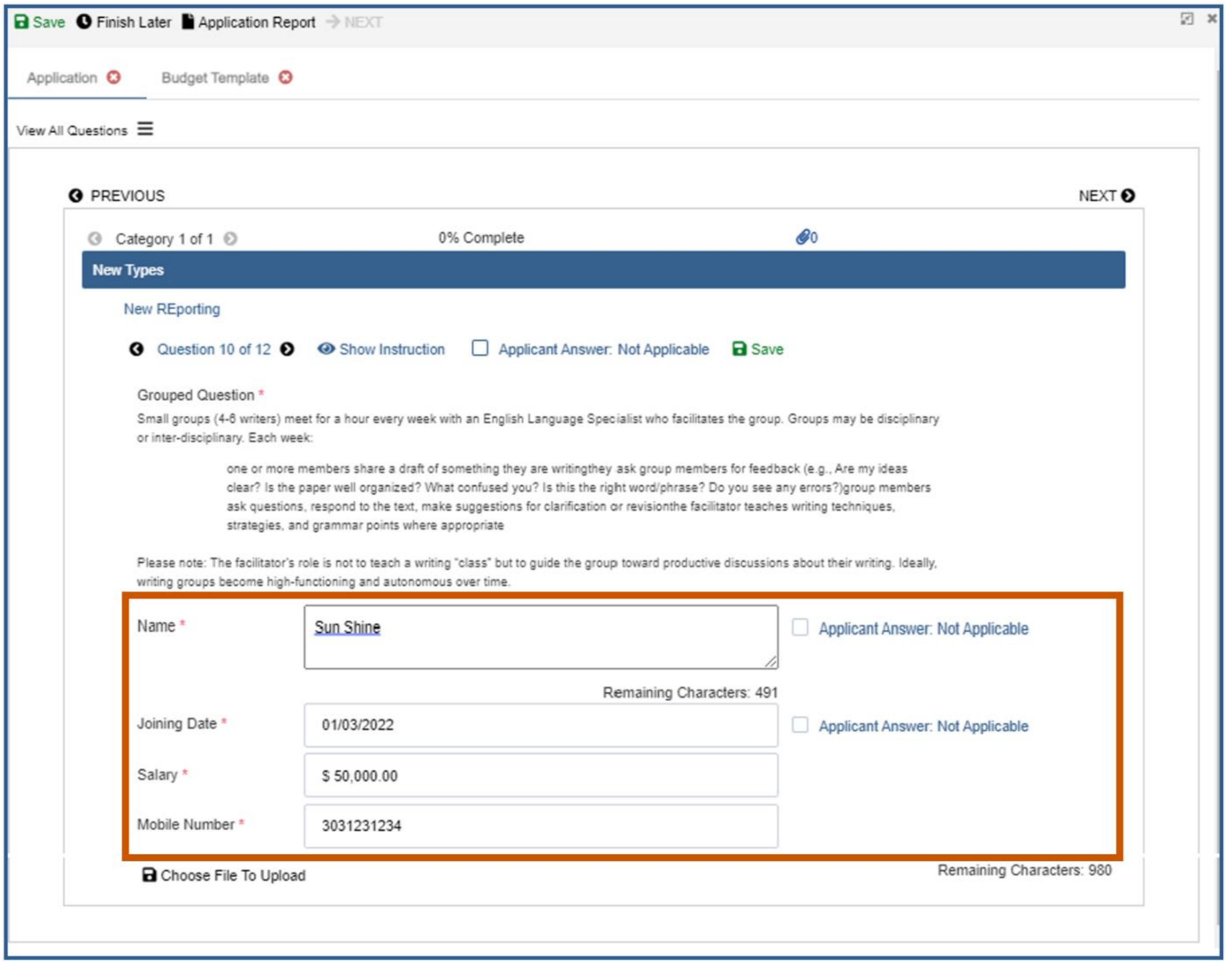


Figure 132: Grouped Questions

If Pick Option, Then Attach

To complete this question, choose from the picklist options. This is a single select, which means you can only select one option. Depending on which picklist you choose, you may be required to attach a document to complete the question. If the "Choose File to Upload" button appears, you must attach a document. Otherwise, the answer will not save. If the "Choose File to Upload" button does not appear, the answer saves.

1. Use the drop-down list to choose from the options.

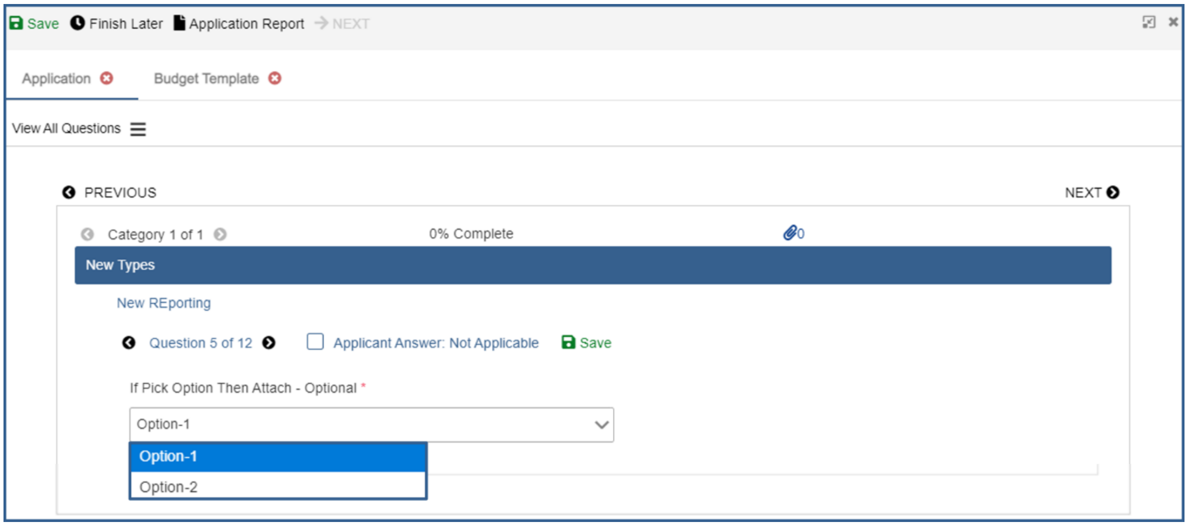


Figure 133: If Pick Option, Then Attach

If there is an attachment required and you try to save the answer, the system will pop up a red warning to attach a file and not save the answer.

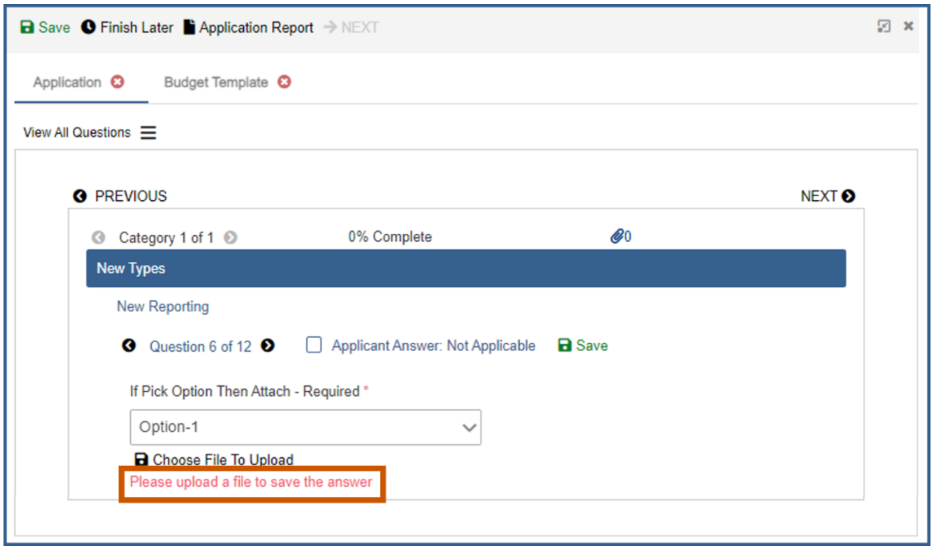


Figure 134: If Pick Option, Then Attach – Error

2. Click **Choose File to Upload.**
3. Choose from grid.
   Or
   Click **Choose File.**
   a. Upload the document.
   b. Click **Save.**
4. Click **Save.**

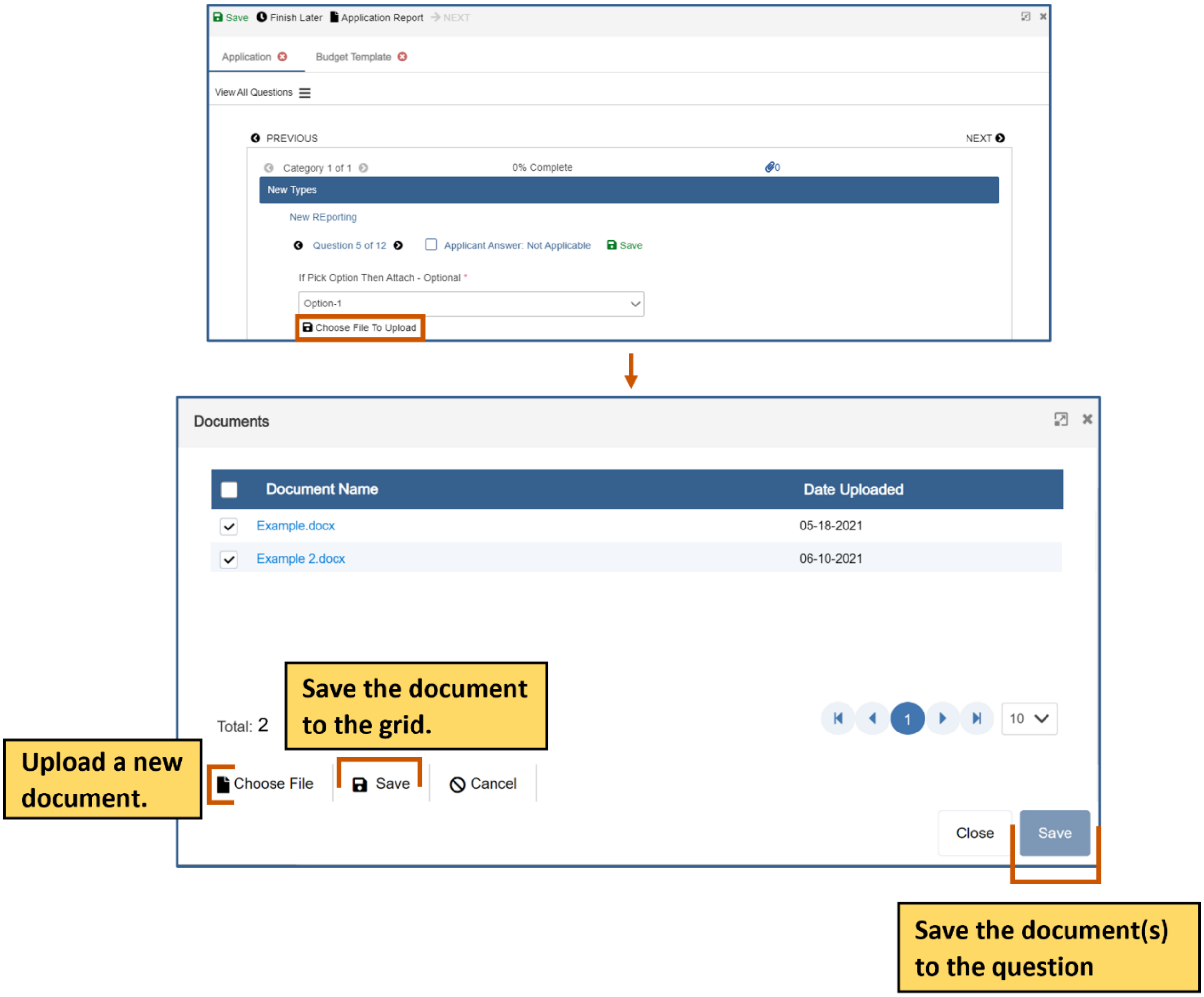


Figure 135: If Pick Option, Then Attach – Add Attachment

If Pick Option, Then Checklist

To complete this question, choose from picklist options. Depending on which picklist you choose, you may be required to select options from a checklist dropdown to complete the question. If the checklist dropdown appears, you must select checklist options. Otherwise, the answer will not save. If the checklist drop-down does not appear, the answer saves.

1. Use the drop-down list to choose from the options.

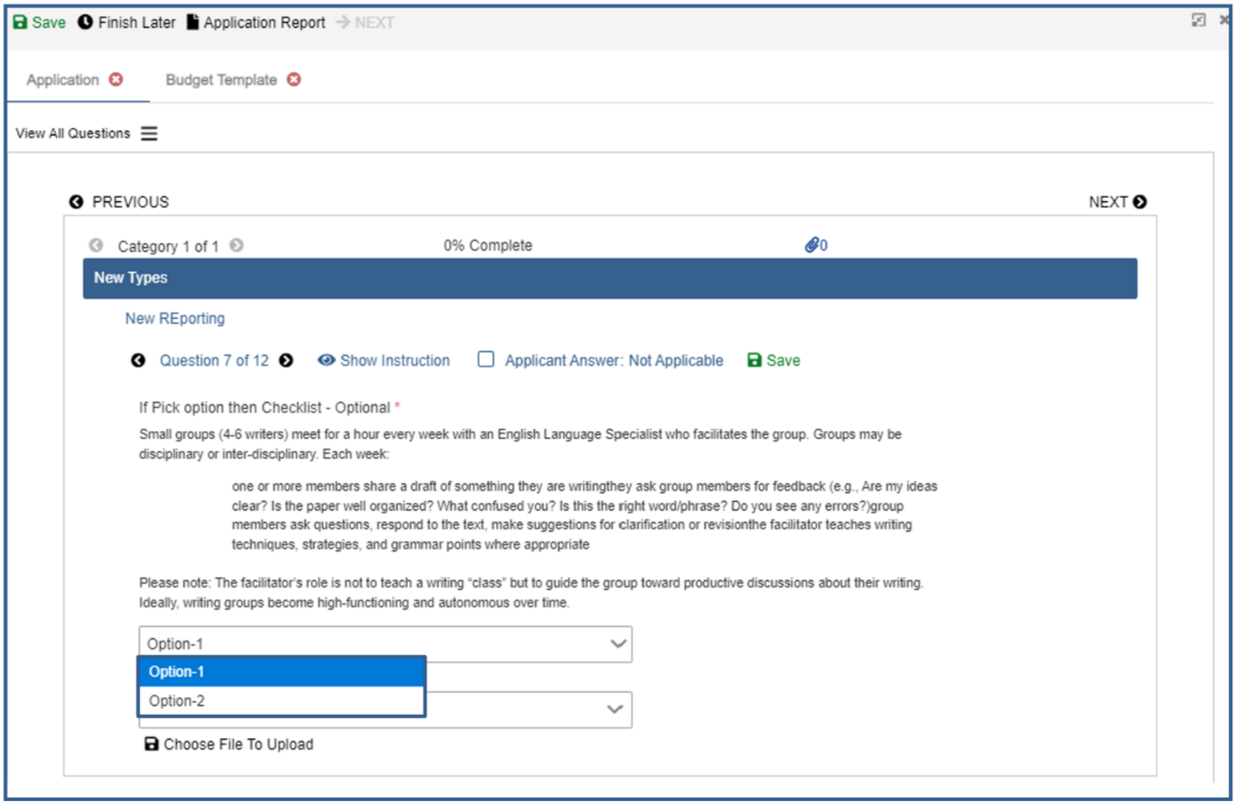


Figure 136: If Pick Option, Then Checklist

2. **Optional:** Use the drop-down list to choose from the checklist.

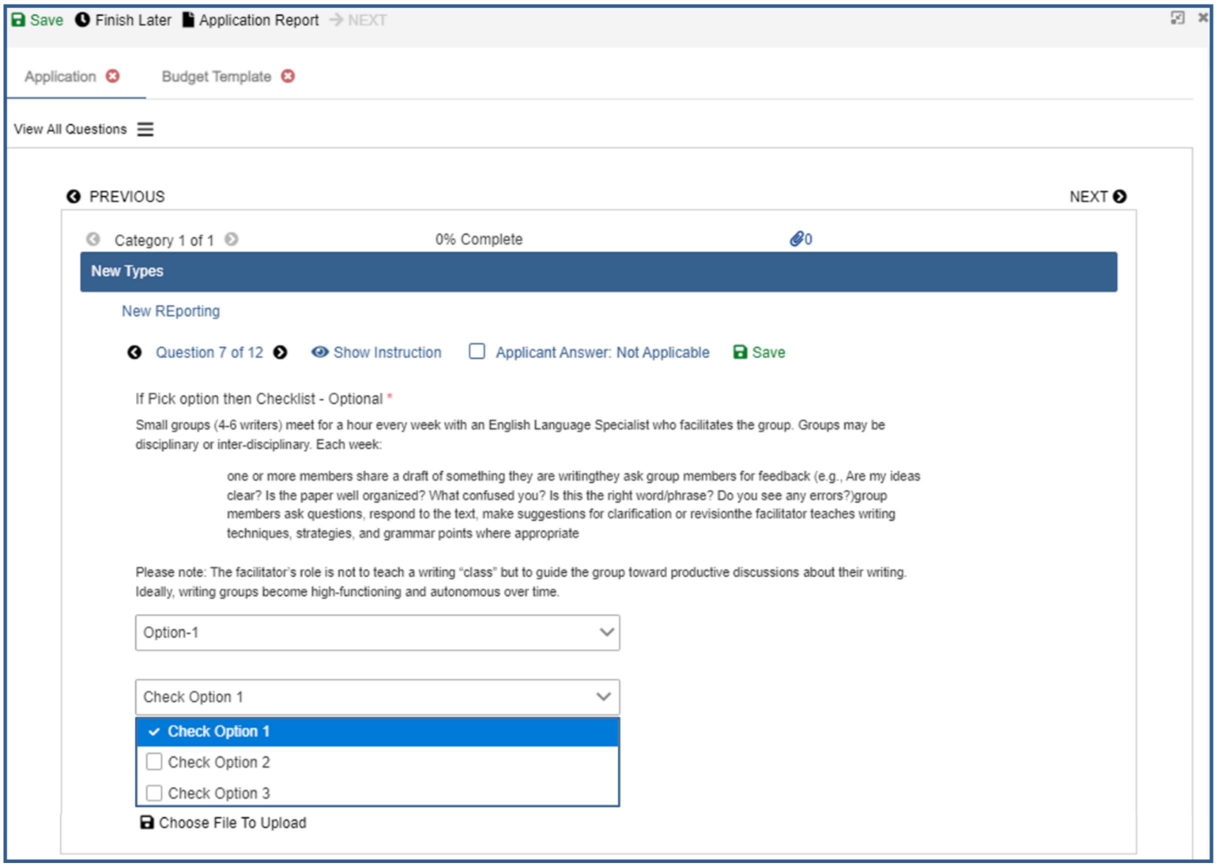


Figure 137: If Pick Option, Then Checklist – Checklist Options

If Yes/No, Then Attach

To complete this question, choose yes or no. This is a single select, which means you can only select one option. Depending on which answer you choose, you may be required to attach a document to complete the question. If the "Choose File to Upload" button appears, you must attach a document. Otherwise, the answer will not save. If the "Choose File to Upload" button does not appear, the answer saves.

1. Use the drop-down list to choose yes or no.

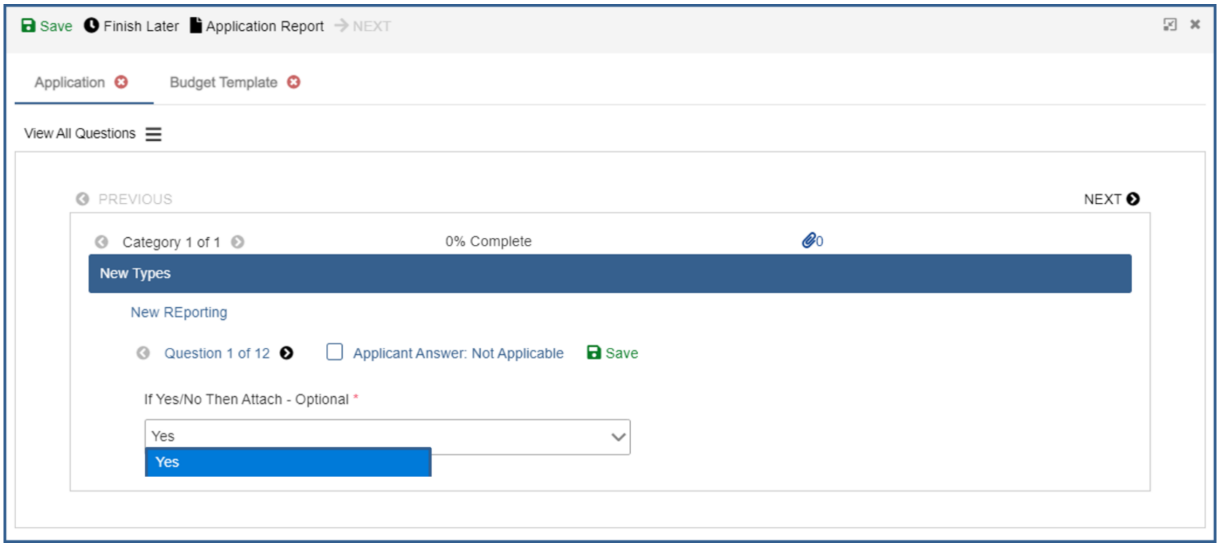


Figure 138: If Yes/No, Then Attach

If there is an attachment required and you try to save the answer, the system will pop up a red warning to attach a file and not save the answer.

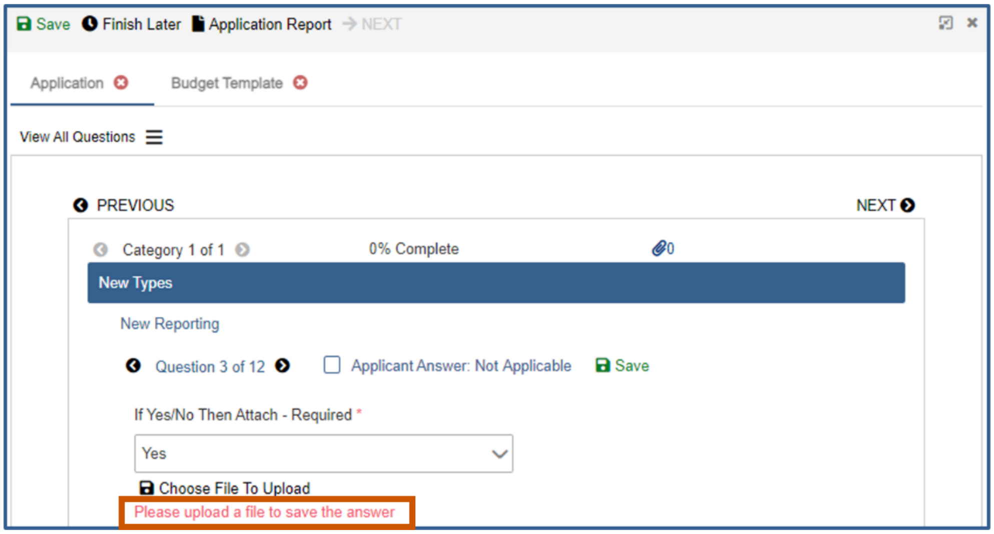


Figure 139: If Yes/No, Then Attach – Error

2. **Optional:** Click **Choose File to Upload.**
3. Choose from grid.
   Or
   Click **Choose File.**
   a. Upload the document.
   b. Click **Save.**
4. Click **Save.**

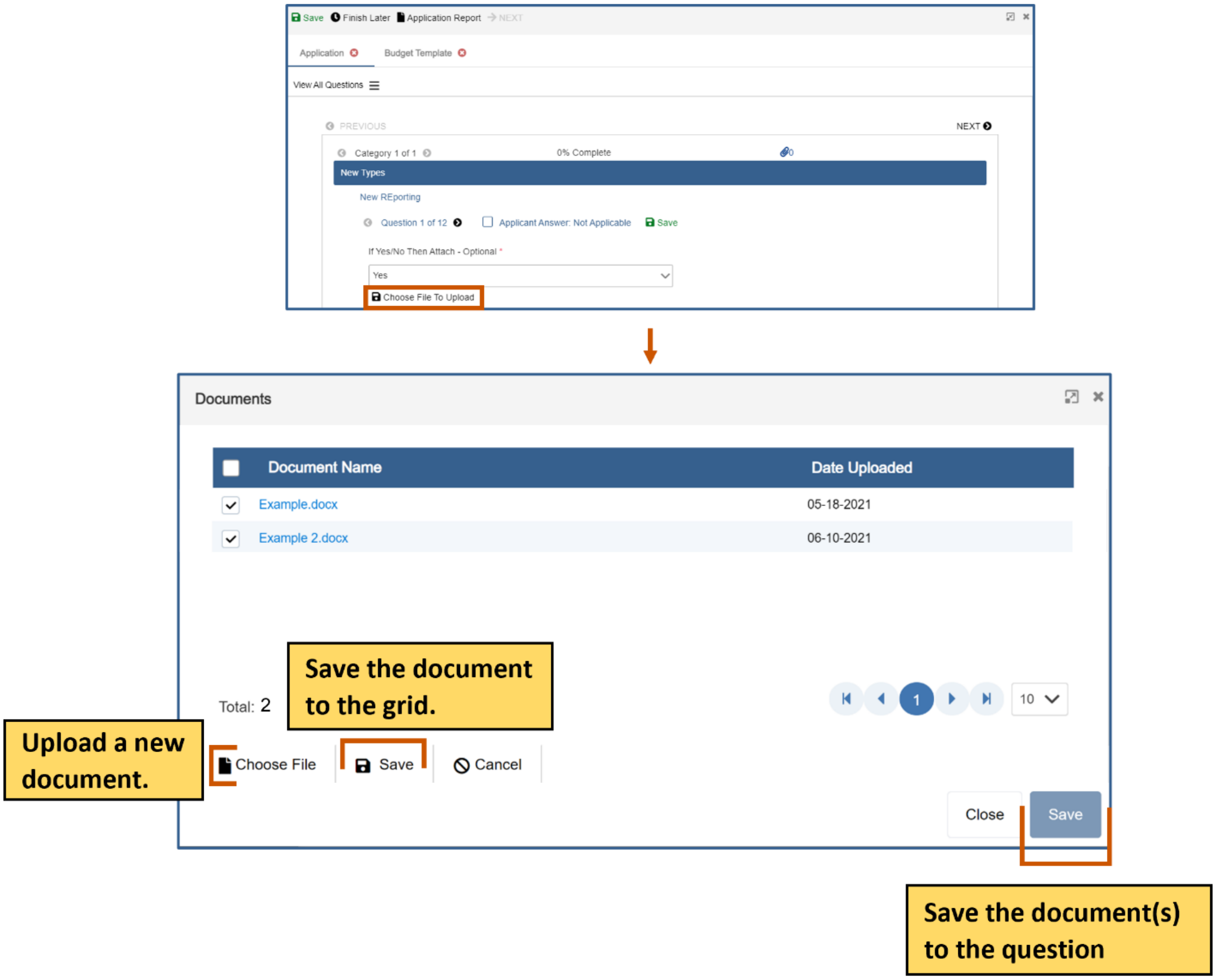


Figure 140: If Yes/No, Then Attach – Add Attachment

If Yes/No, Then Checklist

To complete this question, choose yes or no. This is a single select, which means you can only select one option. Depending on which answer you choose, you may be required to select options from a checklist dropdown to complete the question. If the checklist dropdown appears, you must select checklist options. Otherwise, the answer will not save. If the checklist drop-down does not appear, the answer saves.

1. Use the drop-down list to choose yes or no.

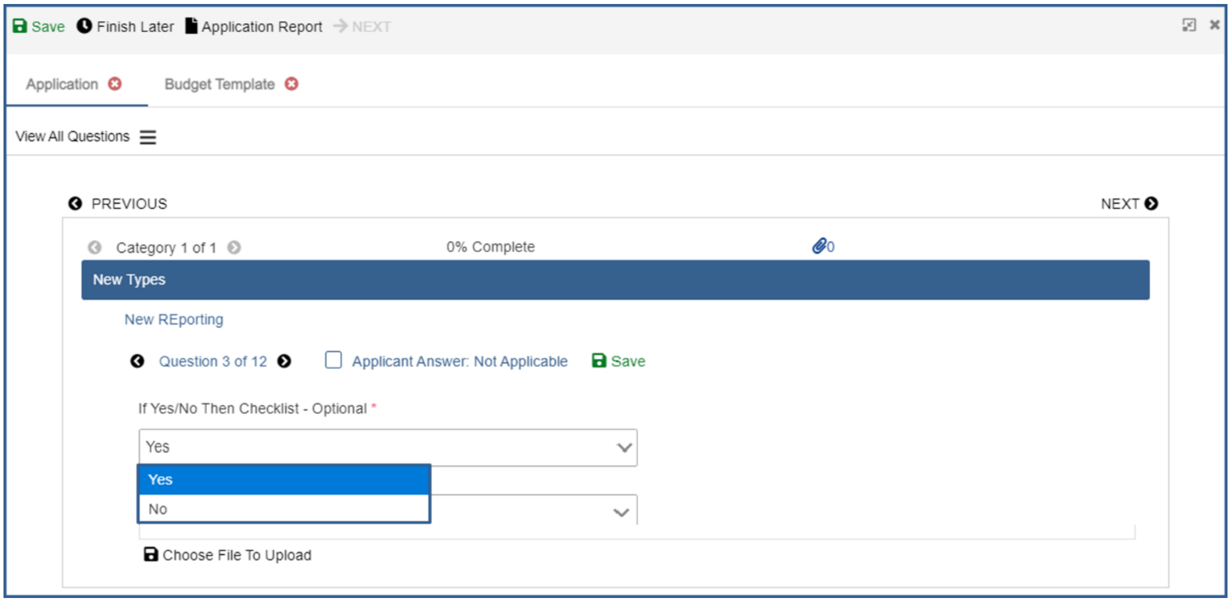


Figure 141: If Yes/No, Then Checklist

2. **Optional:** Use the drop-down list to choose from the checklist.

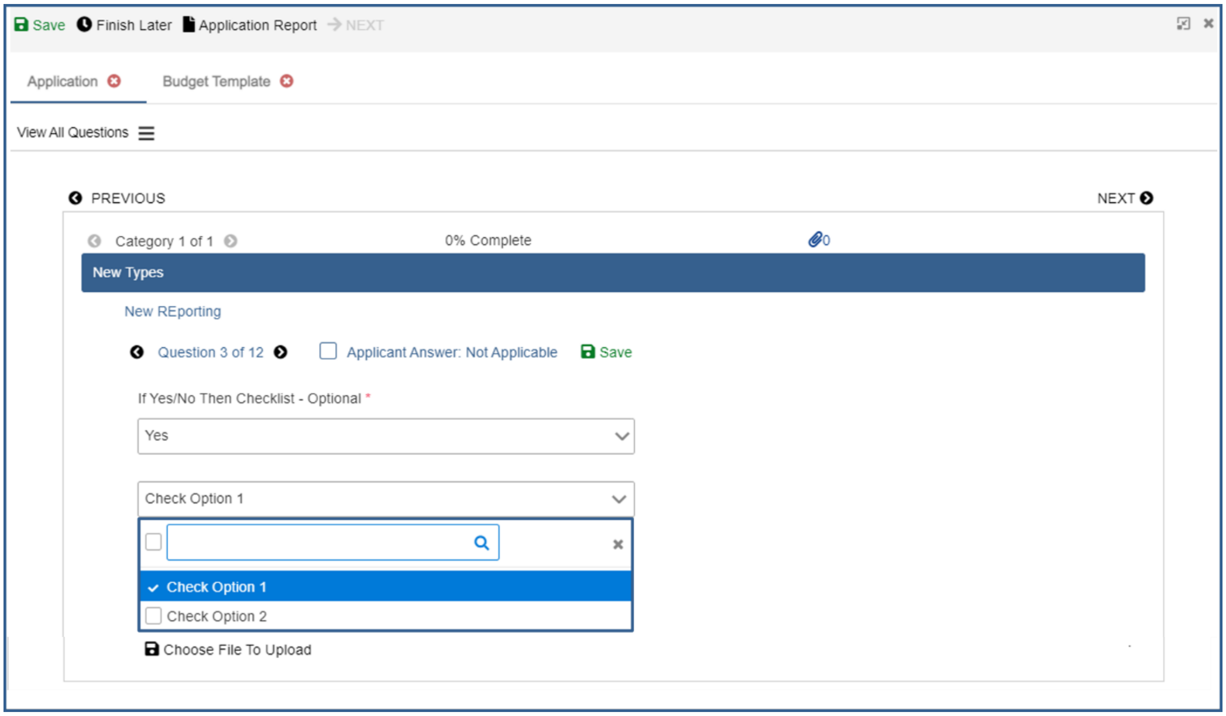


Figure 142: If Yes/No, Then Checklist – Choose from Checklist

Money

To complete this question, input a dollar amount.

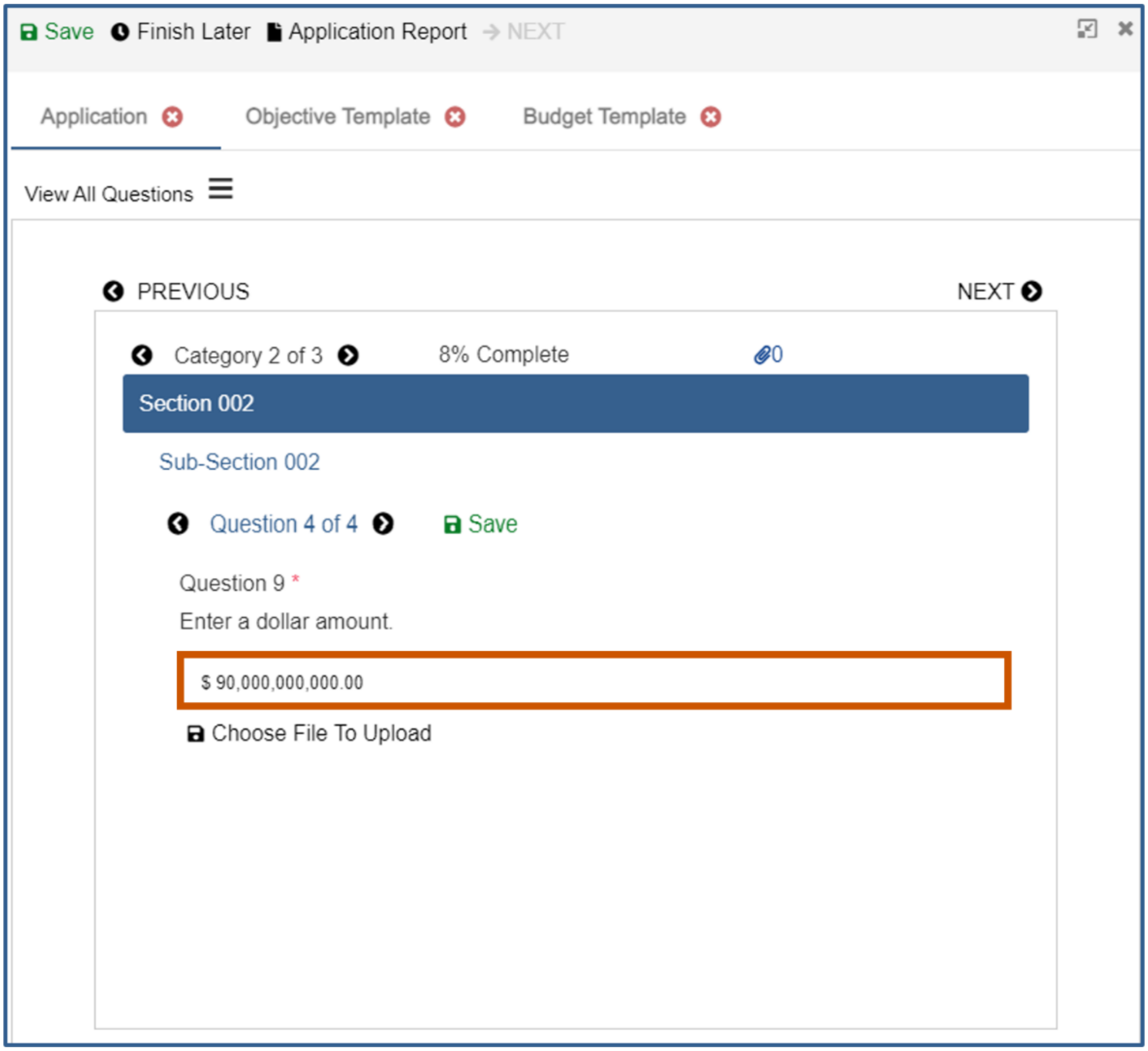


Figure 143: Enter Dollar Amount

Number

To complete this question, input a number.

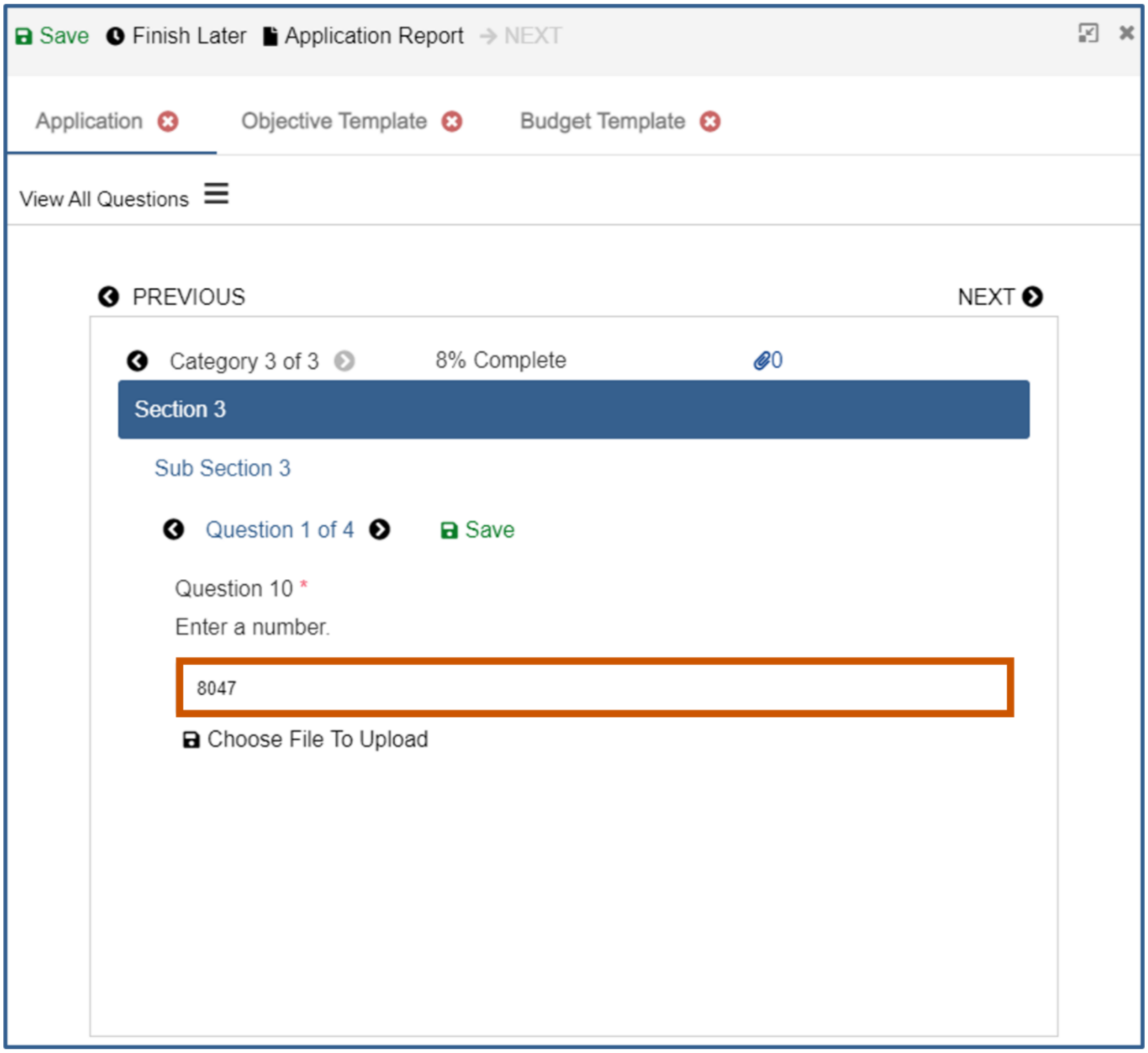


Figure 144: Enter Number

Percentage

To complete this question, input a percentage.

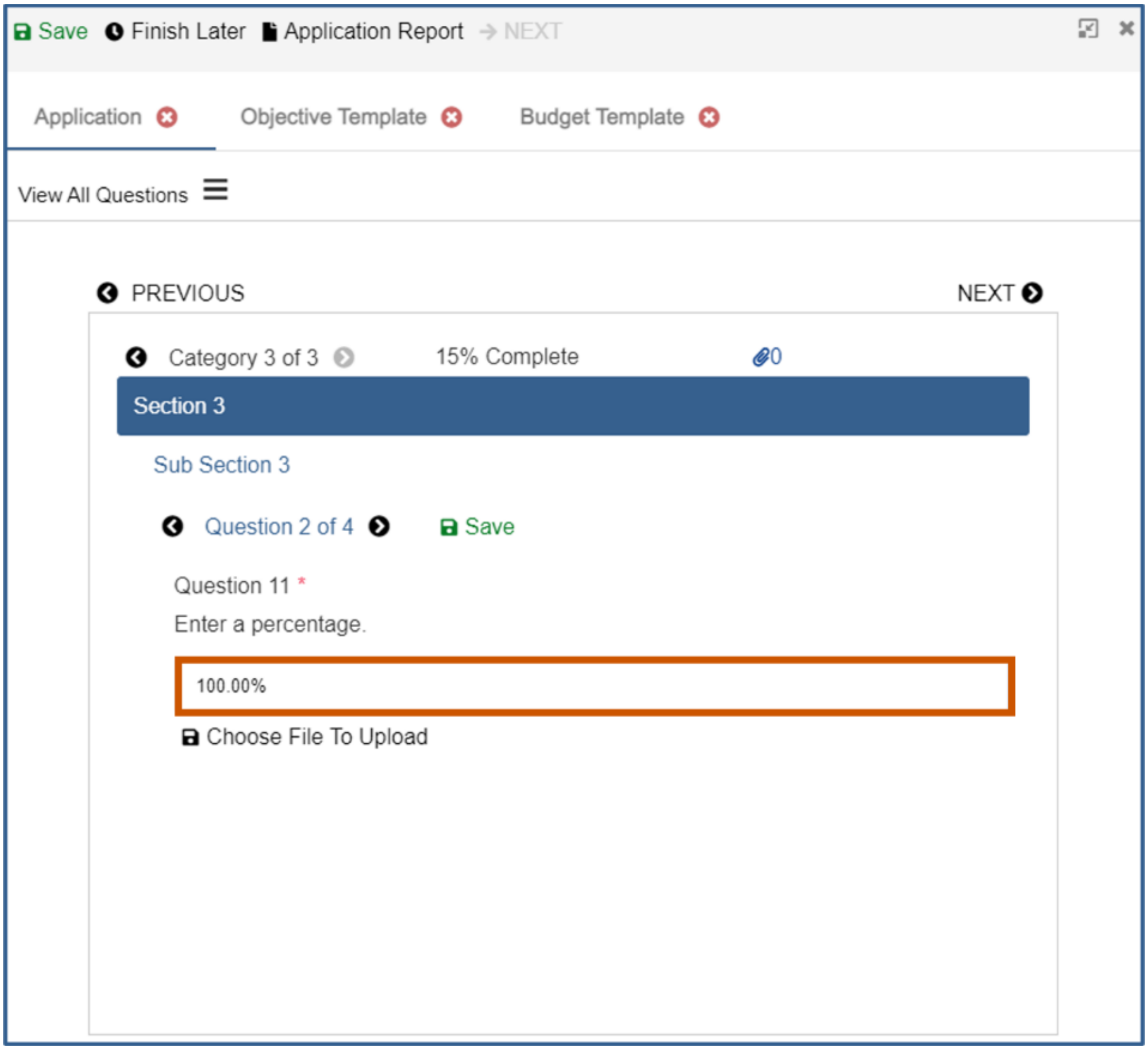


Figure 145: Percentage

Picklist

To complete this question, choose from a picklist. This is a single select, which means you can only select one option.

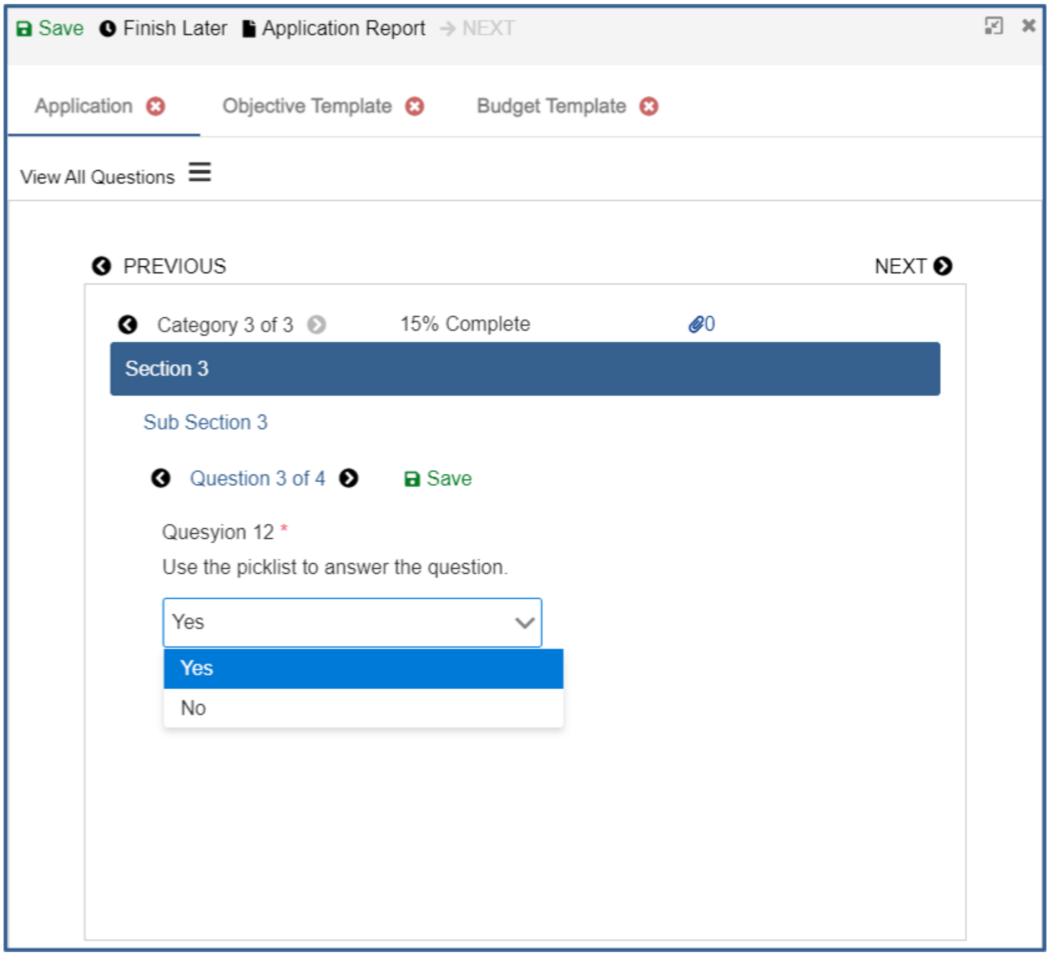


Figure 146: Choose from Picklist

Small Text

To complete this question, enter text. This is an unformatted text box. Narrative fields may have a character limit that will display the maximum number of characters an applicant response may contain. The character limit will count down until it reaches zero (0), and the system will not allow you to continue typing. If there is no character limit it will be indicated by a double dash (--).

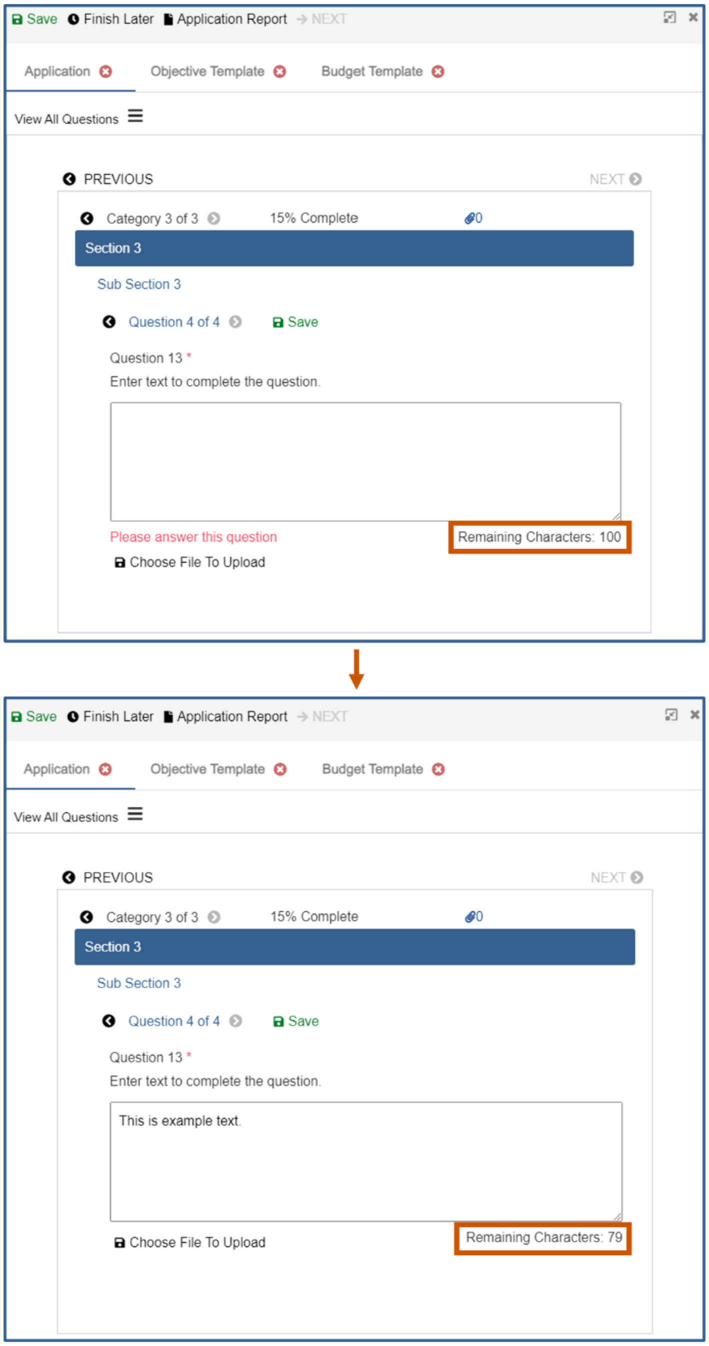


Figure 147: Small Text Character Limit

Objective Tools

You can add, edit, or delete parts of the Objective template. Use the arrows to expand the list of objectives, performance measures, and grant activities. When you are done modifying the Objective template, save it to lock it.

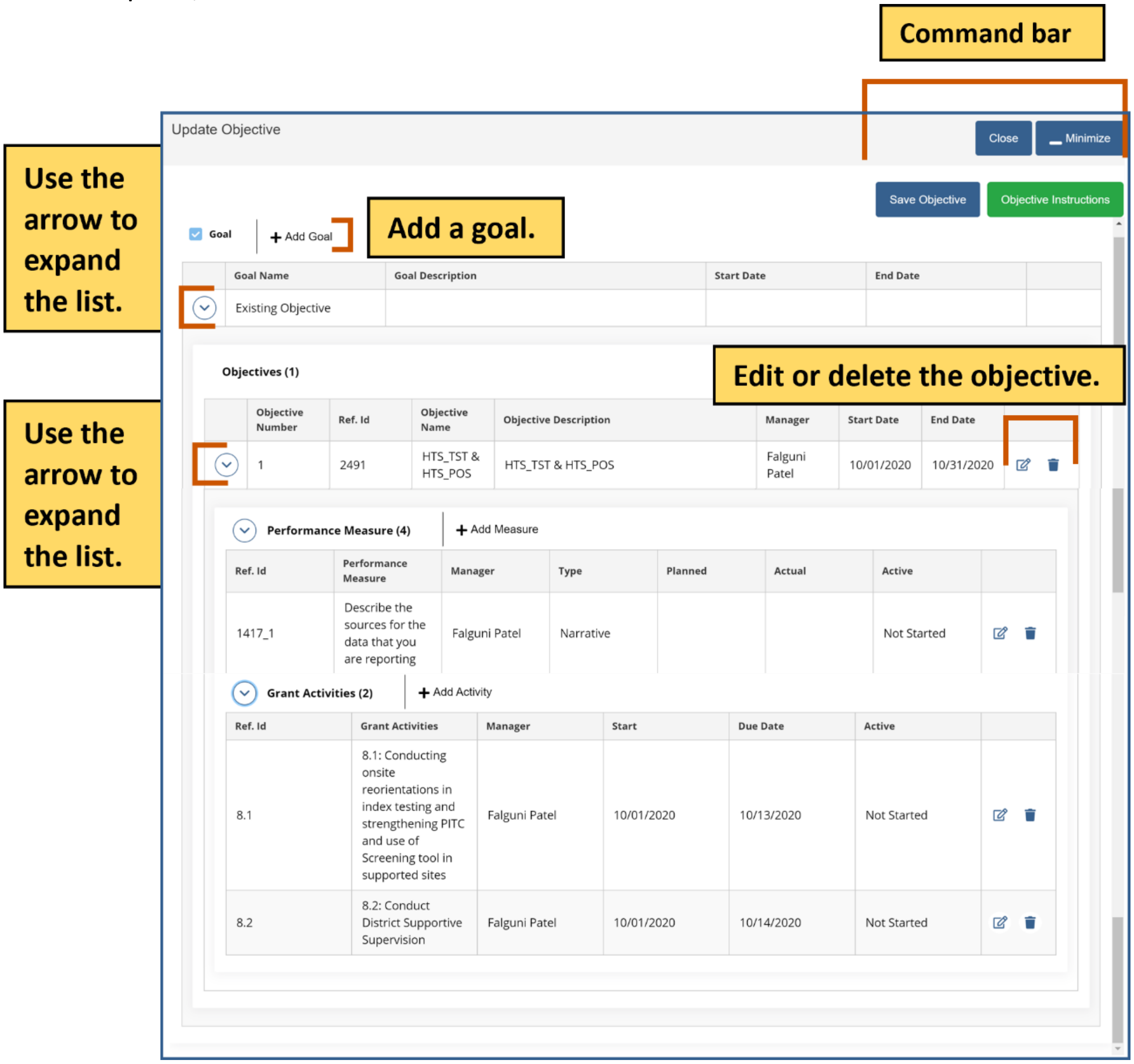


Figure 148: Goals and Objectives

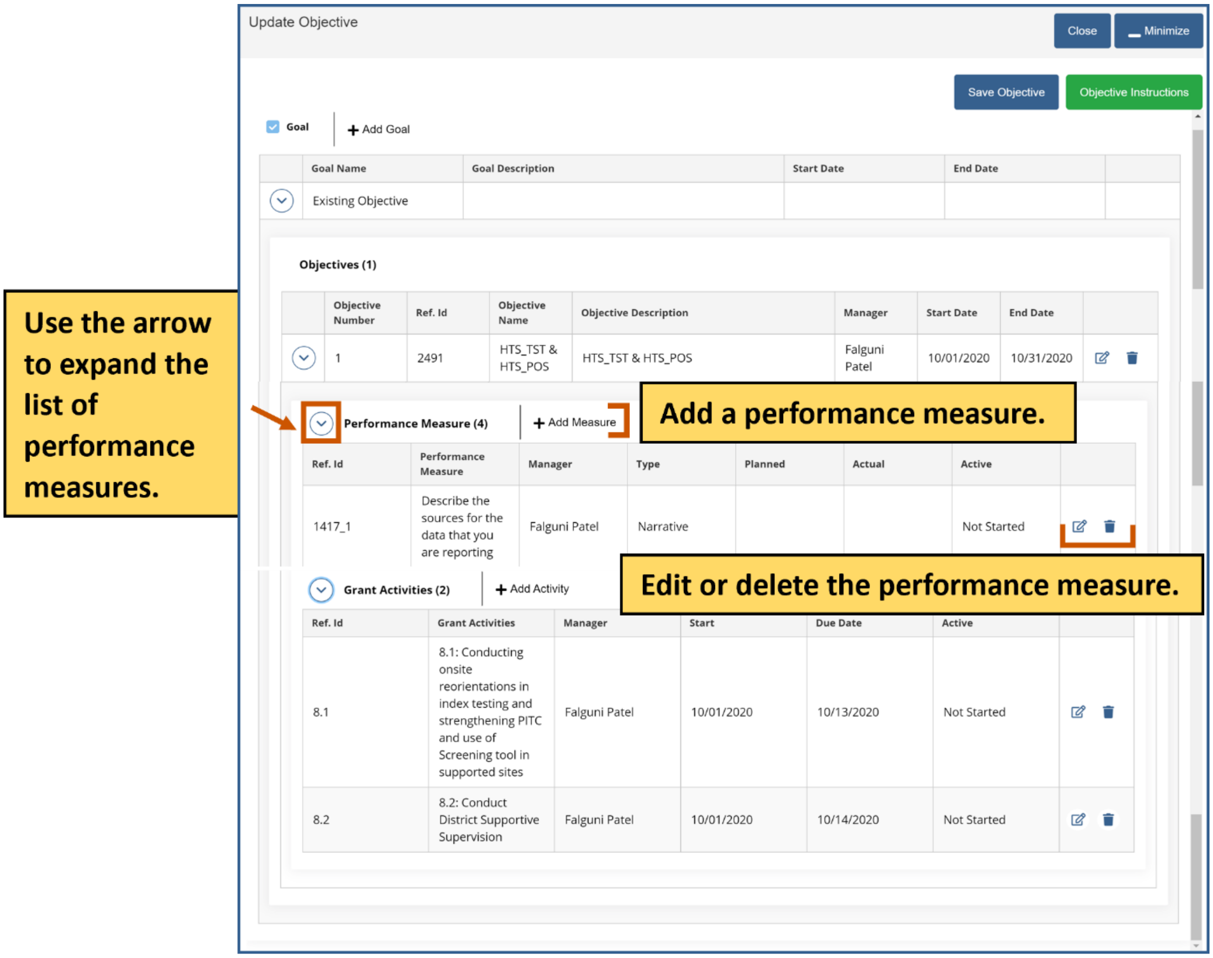


Figure 149: Performance Measures

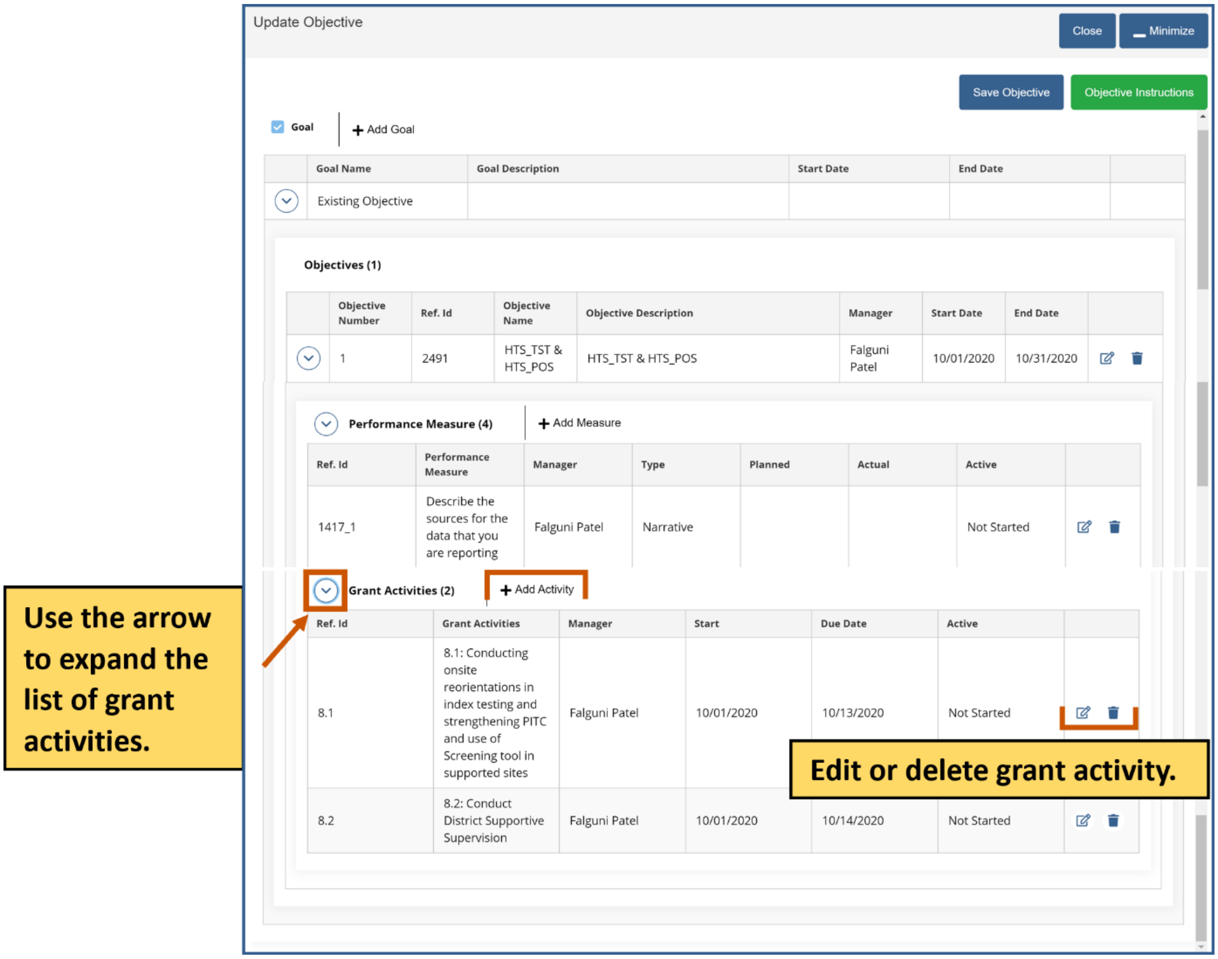


Figure 150: Grant Activities

Add a Goal

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

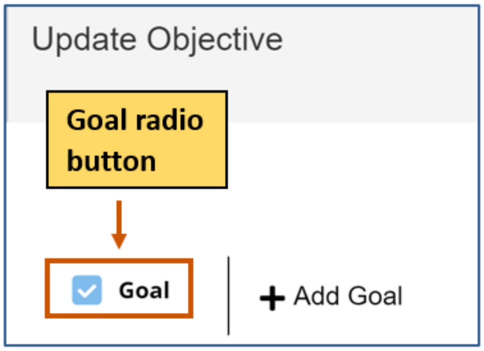


Figure 151: Goal Radio Button

1. Click **+ Add Goal.** The Goal dialog box appears.
2. Fill in the necessary fields.
   Note: The red asterisks indicate required fields.
3. Click **Save.** The goal appears in the grid. Repeat steps 1-3 for each goal you wish to add.

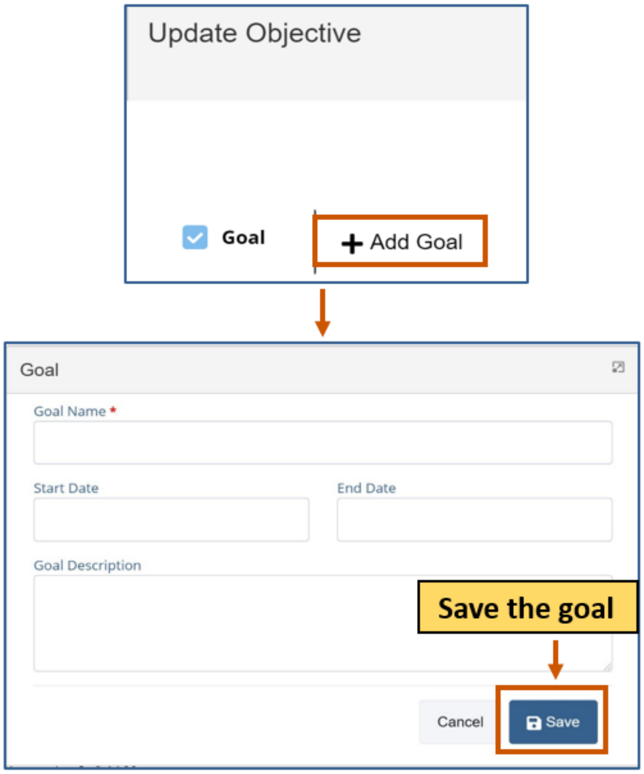


Figure 152: Add Goal

Add an Objective

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Click ✚ **Add Objective.** The Objective dialog box appears.

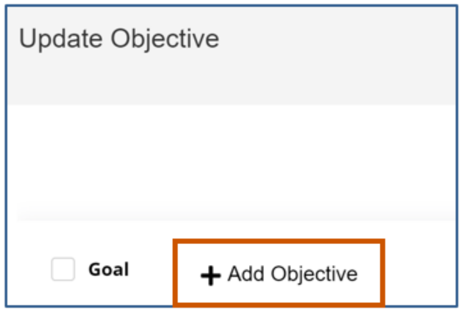


Figure 153: Add Objective

3. Fill in the necessary fields.
   ⓘ **Note:** The red asterisks indicate required fields.
4. Click **Save.** The objective appears in the grid. Repeat steps 2-4 for each objective you wish to add.

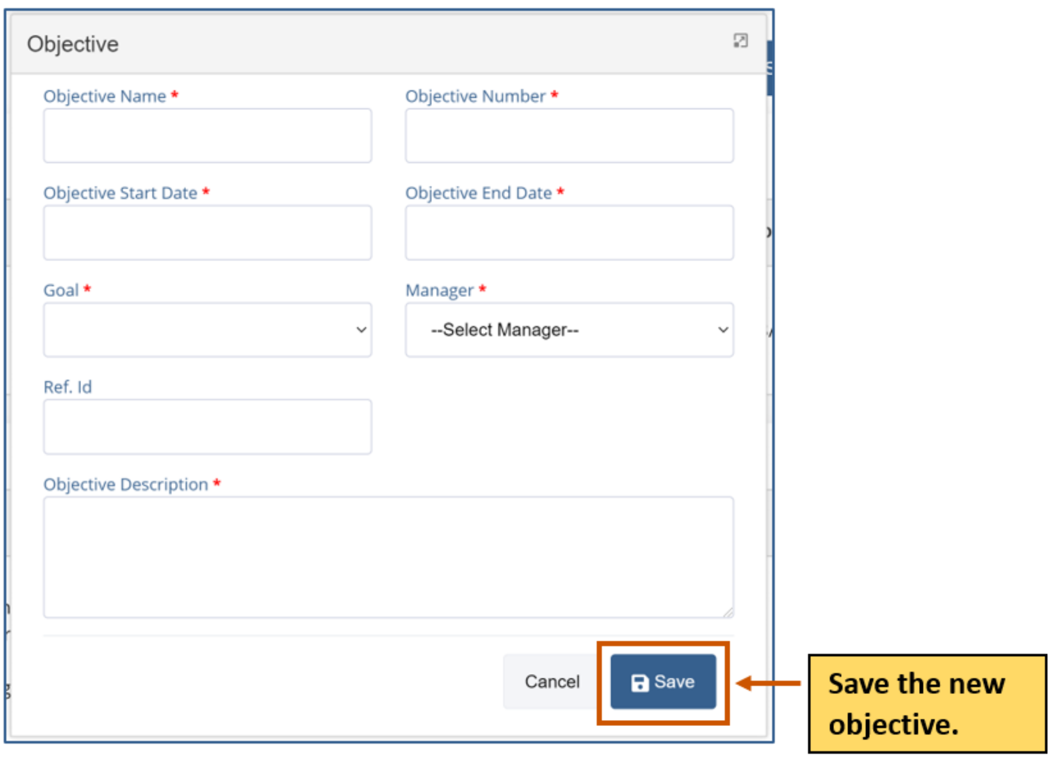


Figure 154: Objective Dialog Box

Add a Performance Measure

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Click ✚ **Add Measure**. The Performance Measure dialog box appears.

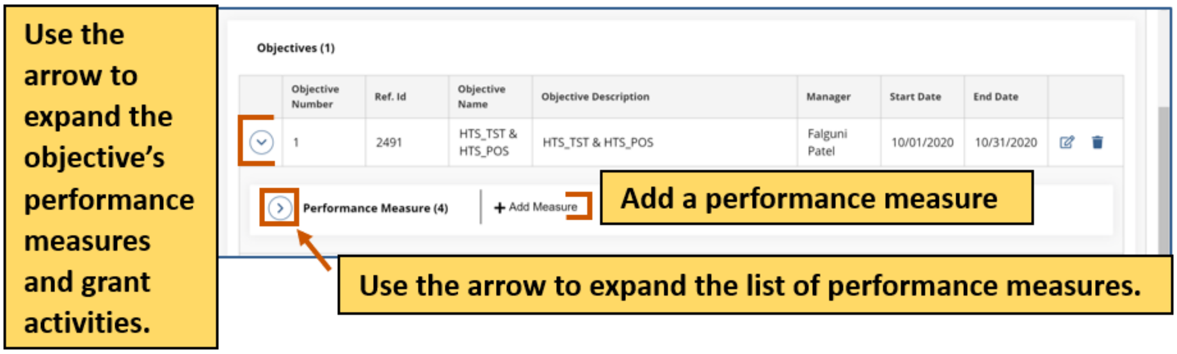


Figure 155: Add Measure

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

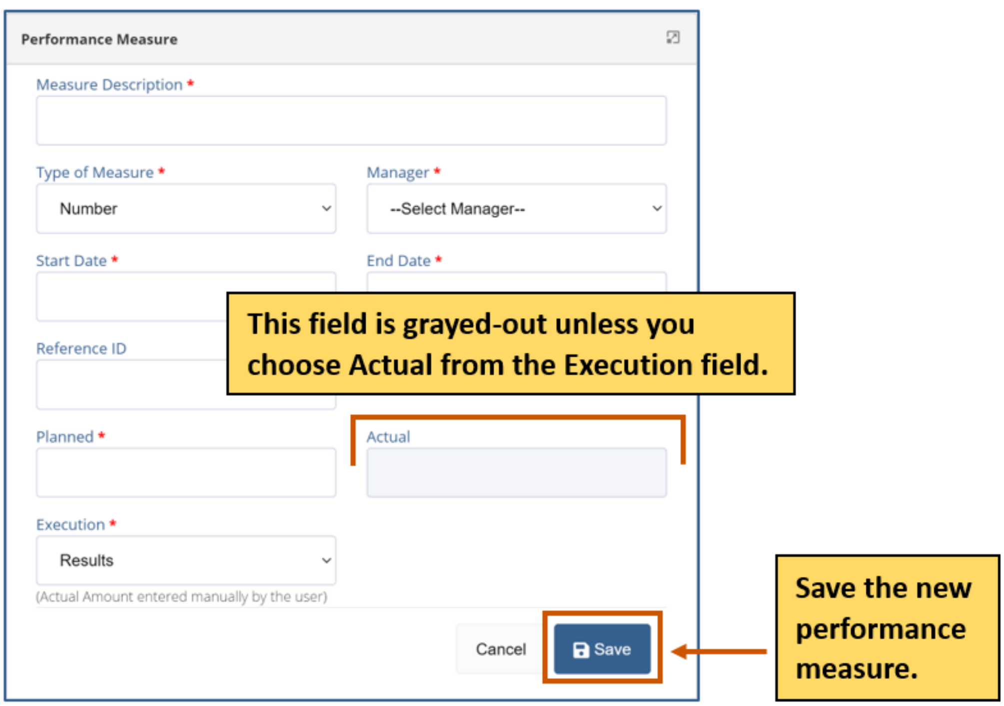


Figure 156: Performance Measure Dialog Box

Add a Grant Activity

1. **Optional:** Use the arrow to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Click ✚ **Add Activity.** The Grant Activity dialog box appears.

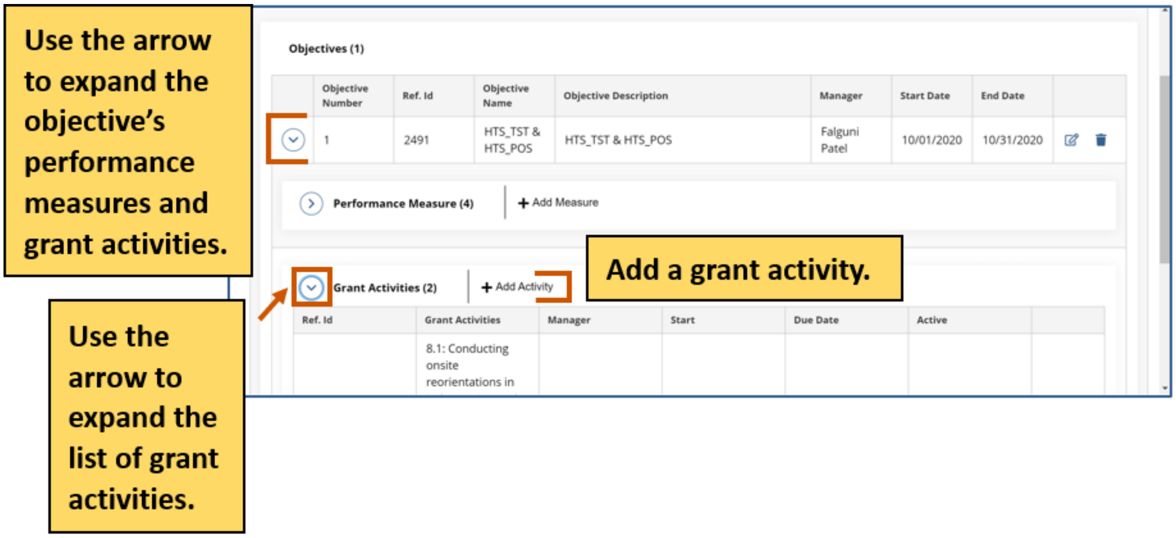


Figure 157: Add Activity

4. Fill In the necessary fields.
   ⓘ **Note:** The red asterisks indicate required fields.
5. Click **Save.** The grant activity appears in the grid. Repeat steps 2-5 for each grant activity you wish to add.

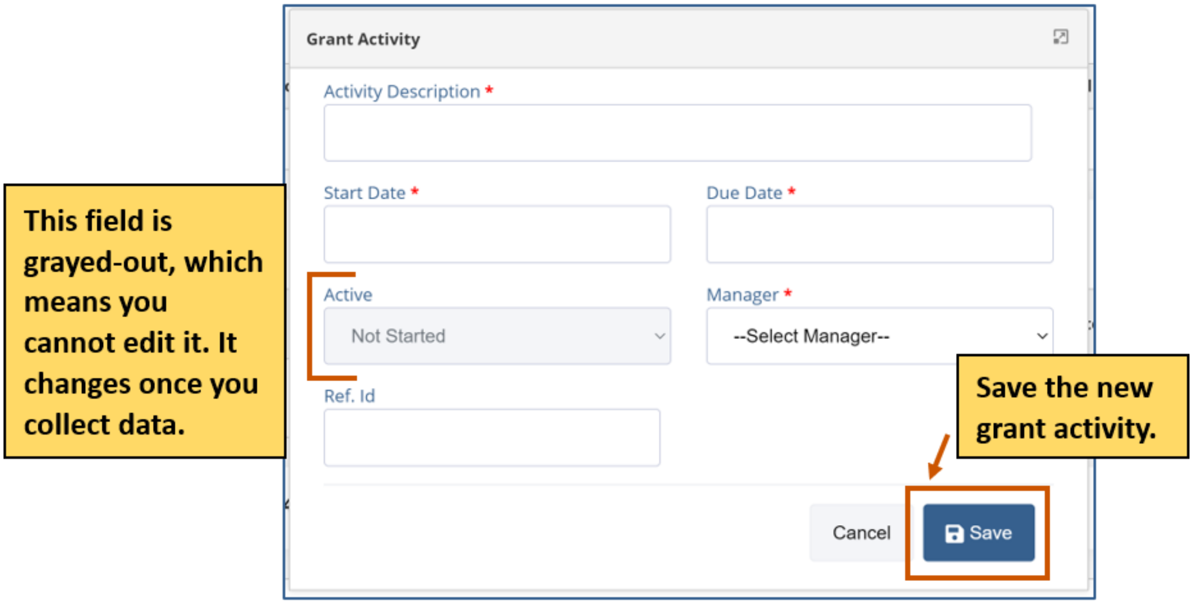


Figure 158: Grant Activity Dialog Box

Edit an Objective

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Choose the objective you wish to modify.
4. Click **Edit** . The Objective dialog box appears.

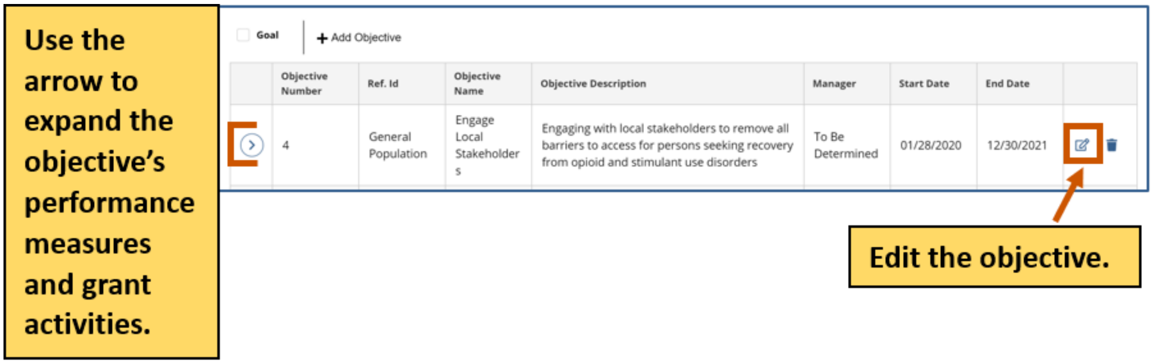


Figure 159: Edit Objective

5. Edit the necessary fields.
   Note: The red asterisks indicate required fields.
6. Click **Save.** The changes to the objective appear in the grid. Repeat steps 3-6 for each objective you wish to modify.

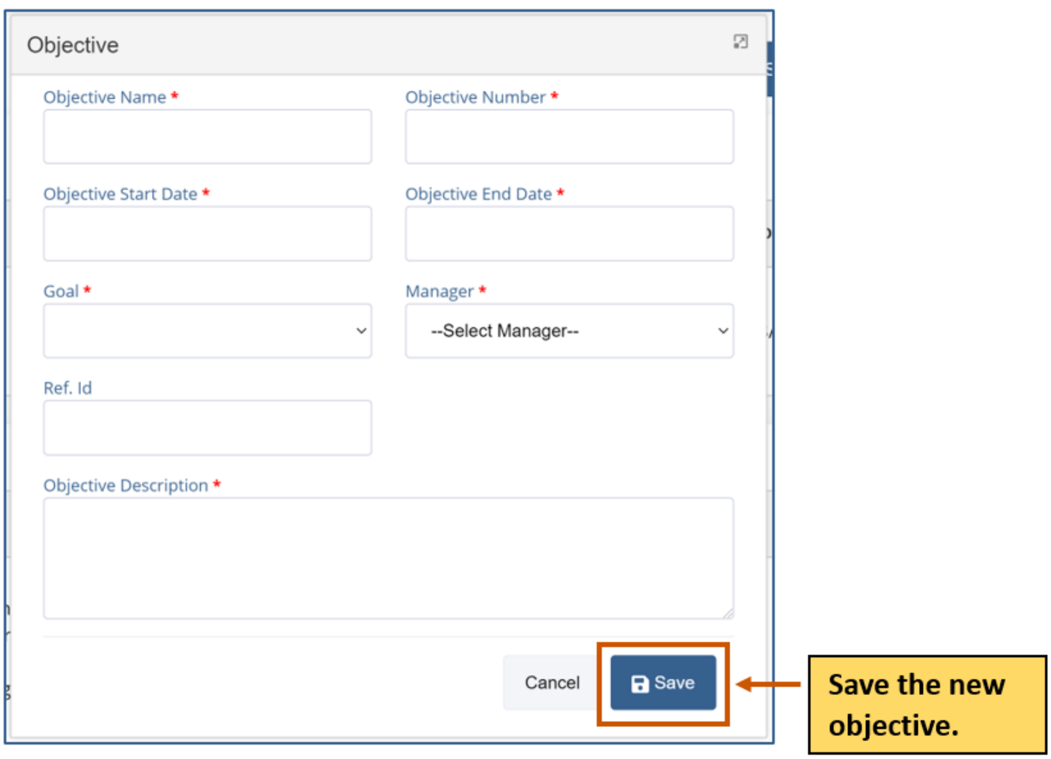


Figure 160: Objective Dialog Box

Edit a Performance Measure

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

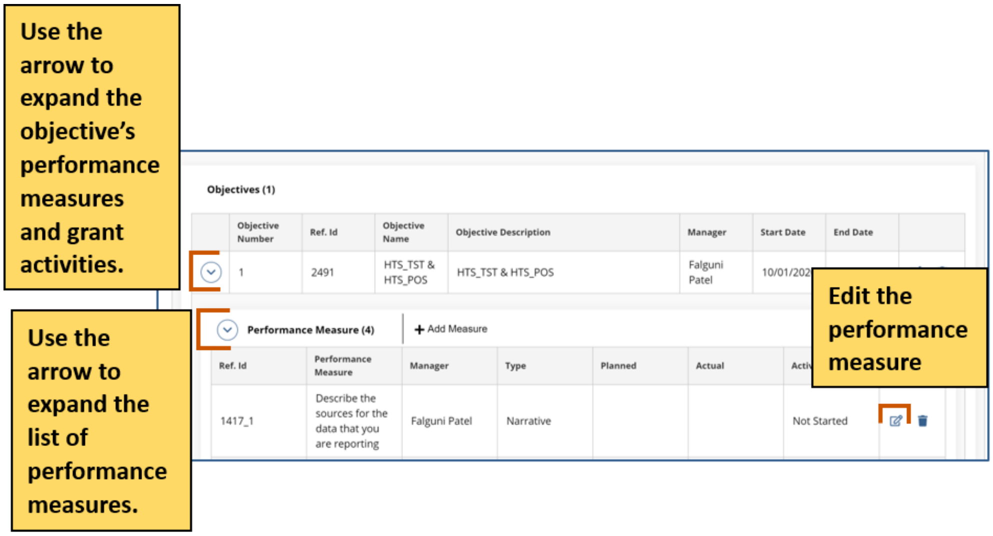


Figure 161: Edit Performance Measure

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

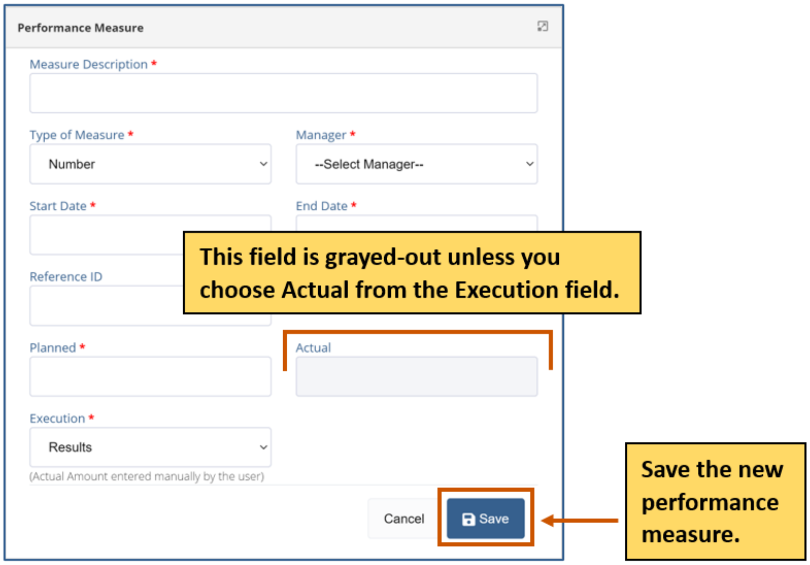


Figure 162: Performance Measure Dialog Box

Edit a Grant Activity

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the grant activity to expand the list.
4. Choose the grant activity you wish to modify.
5. Click **Edit** . The Grant Activity dialog box appears.

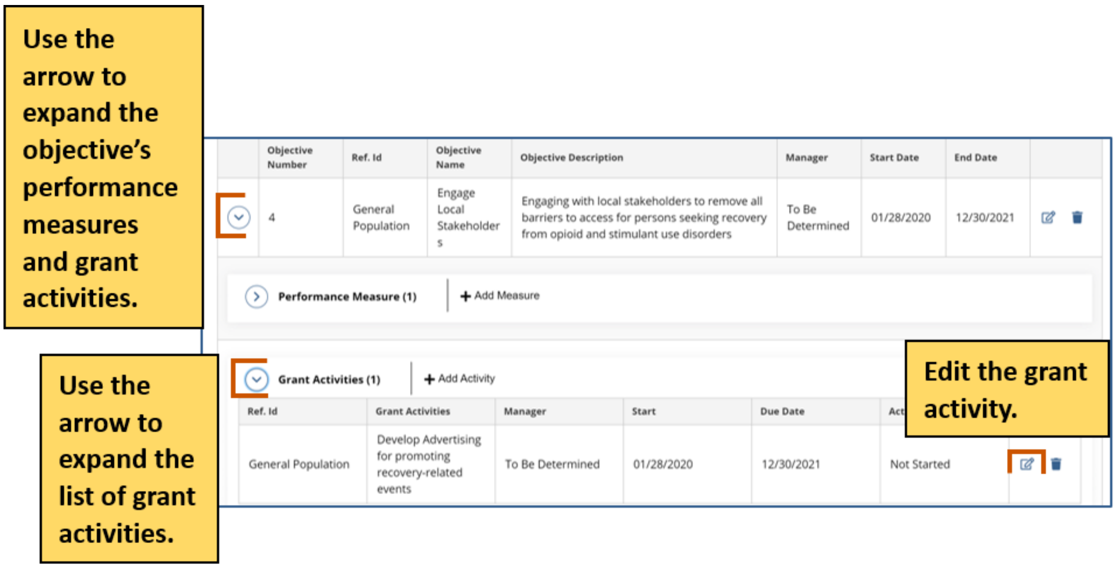


Figure 163: Edit Grant Activity

6. Edit the necessary fields.
   Note: The red asterisks indicate required fields.
7. Click **Save.** The changes to the grant activity appear in the grid. Repeat steps 4-7 for each grant activity you wish to modify.

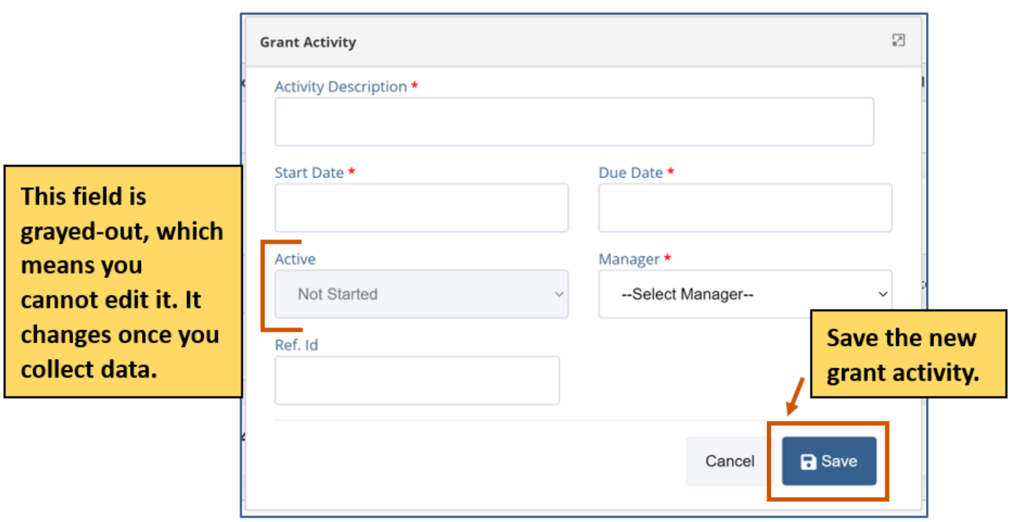


Figure 164: Grant Activity Dialog Box

Delete an Objective

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Choose the objective you wish to delete.
4. Click **Delete** . A warning appears asking if you are sure you want to delete the objective.

Figure 165: Delete Objective

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

Figure 166: Warning to Delete Objective

Delete a Performance Measure

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the performance measure to expand the list.
4. Choose the performance measure you wish to delete.
5. Click **Delete** . A warning appears asking if you are sure you want to delete the performance measure.

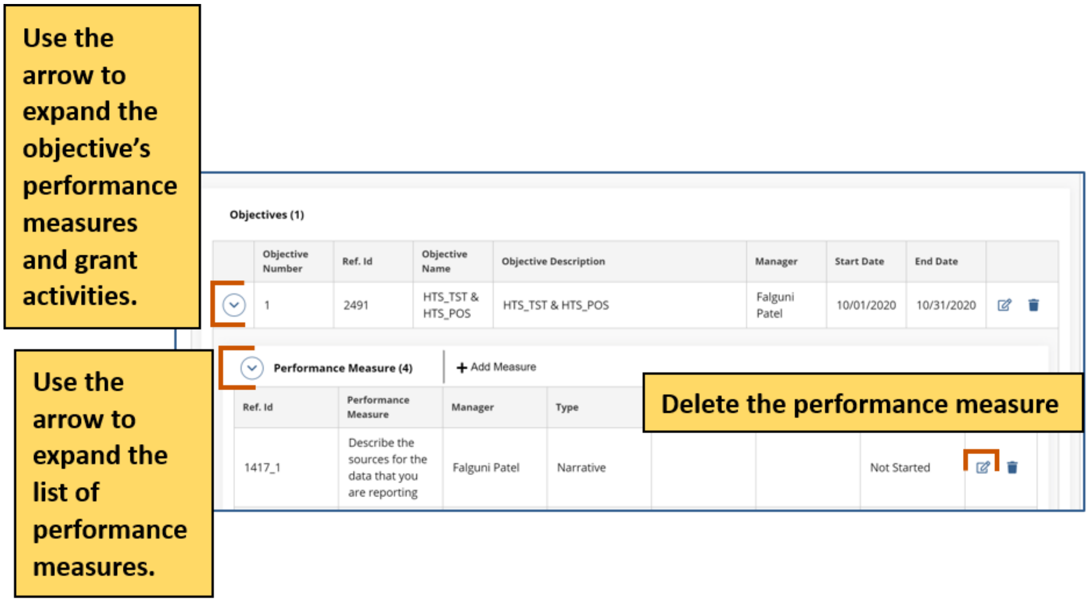


Figure 167: Delete Performance Measure

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

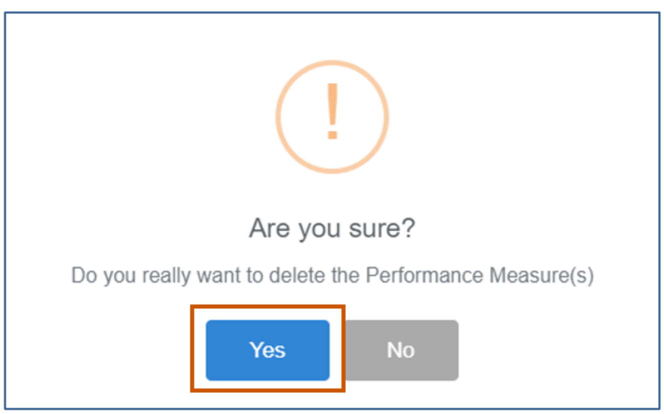


Figure 168: Warning to Delete Performance Measure

Delete a Grant Activity

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the grant activity to expand the list.
4. Choose the grant activity you wish to delete.
5. Click **Delete**. A warning appears asking if you are sure you want to delete the grant activity.

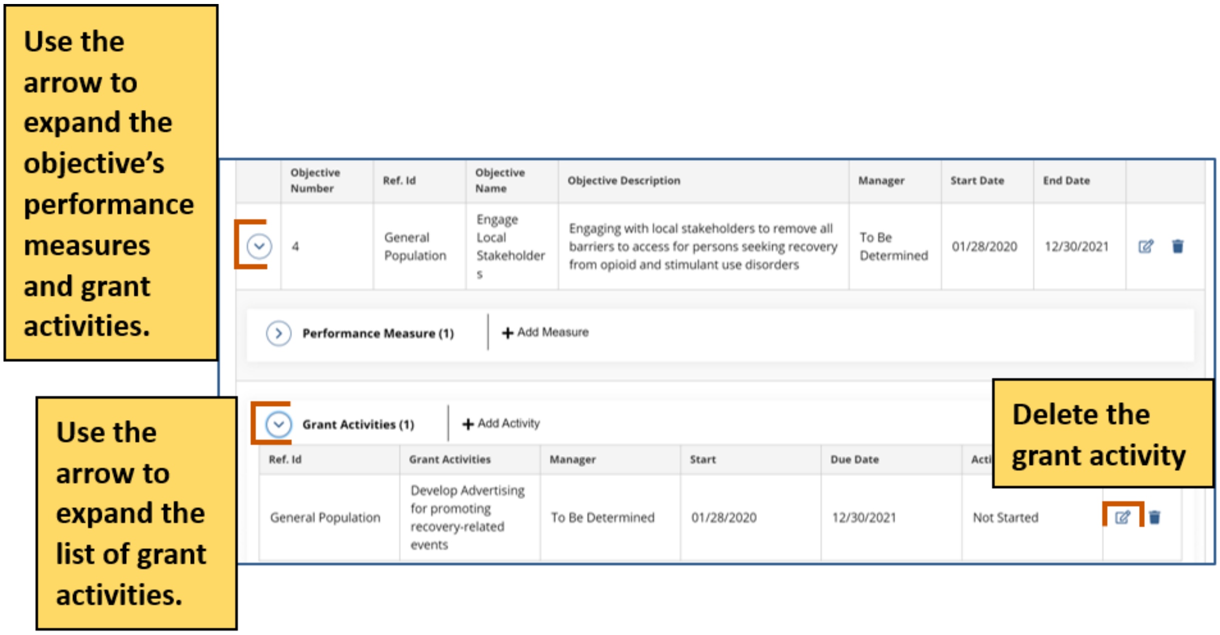


Figure 169: Delete Grant Activity

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

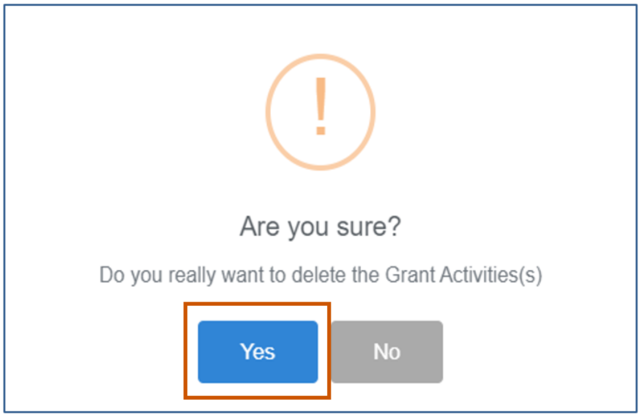


Figure 170: Warning to Delete Grant Activity

Budget Tools

ⓘ **Note:** The items you can add/change depend on the properties selected when the announcement was made.

You can add, edit, or delete parts of the Budget Template. Enter the amounts of money in the cells that are white. Cells that are light blue are not editable. You can also add sub-categories and sub-sub-categories, edit sub-categories and sub-sub-categories, and/or delete sub-categories and sub-sub-categories. Click the green **Budget Justification** icon to show budget calculations and the budget narrative.

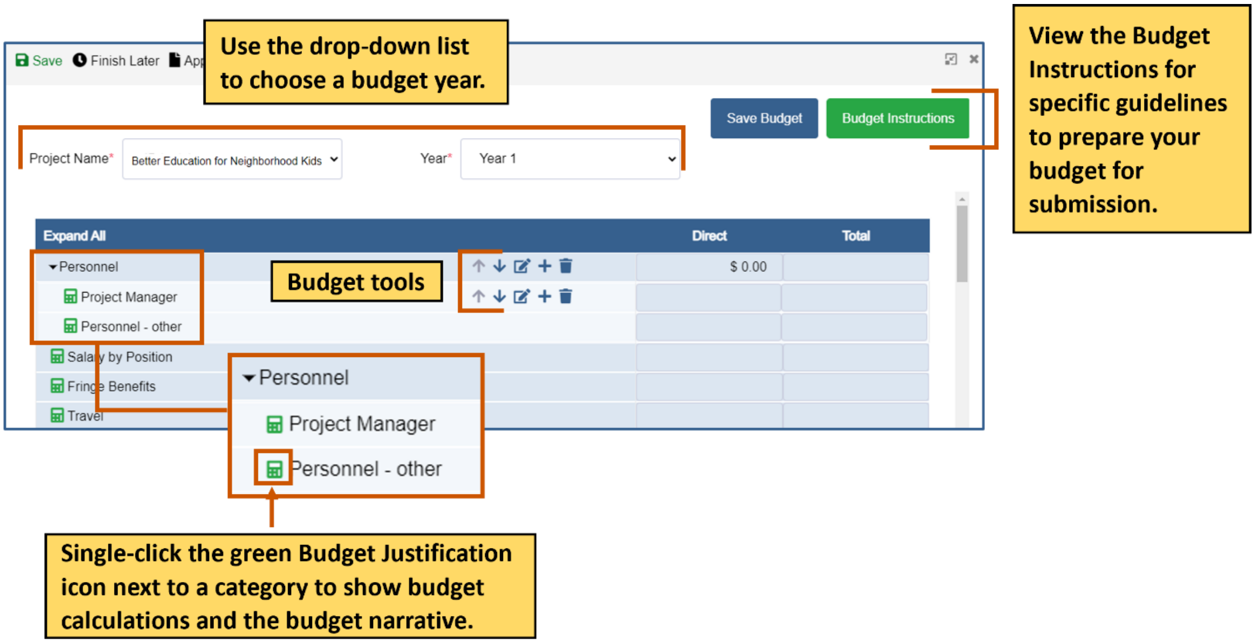


Figure 171: Budget Tools

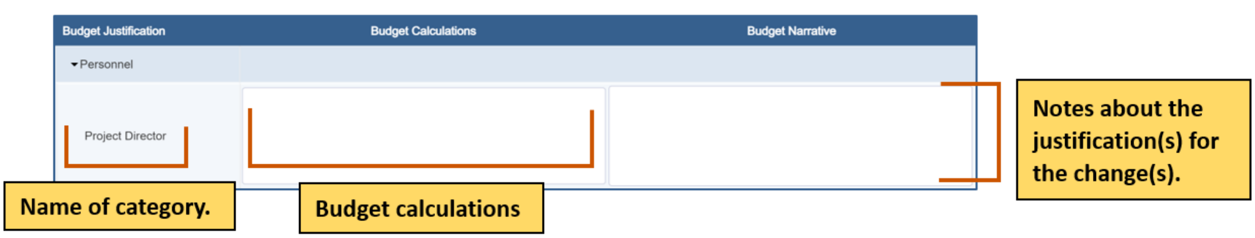


Figure 172: View Budget Calculations

Add Budget Calculations and Budget Narratives

1. **Single-click** the green BN symbol next to a category. The Budget Categories dialog box.
   ⓘ **Note:** The dialog box fields are different based on the budget category.

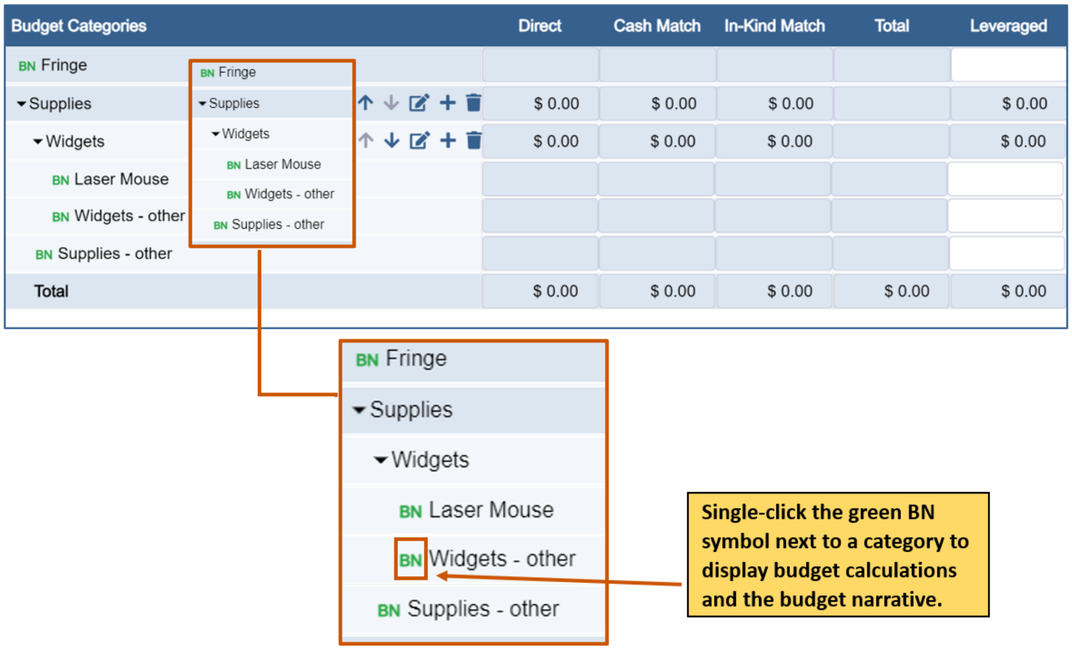


Figure 173: Add Budget Calculations and Narrative

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

Example dialog box

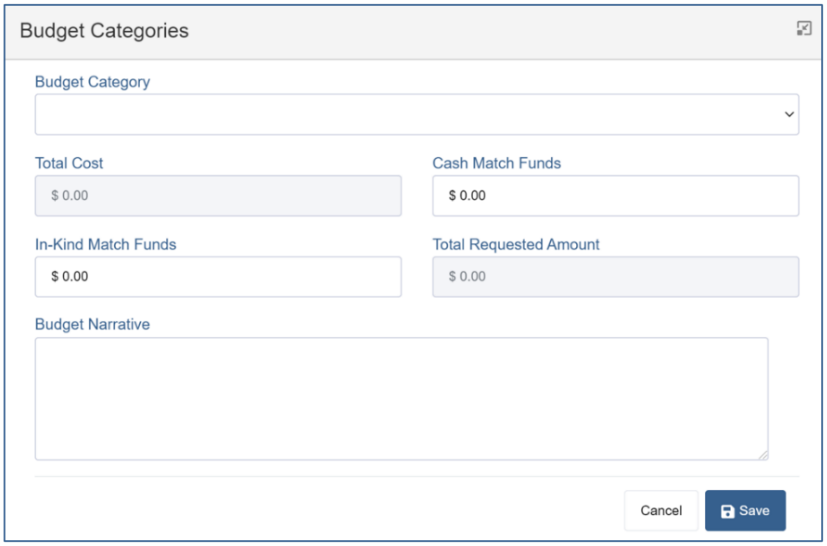


Figure 174: Budget Categories Dialog Box

3. Click **Save.** The budget calculations and budget narrative appears in the table at the bottom of the page. Repeat steps 1-3 for each budget calculation and narrative.

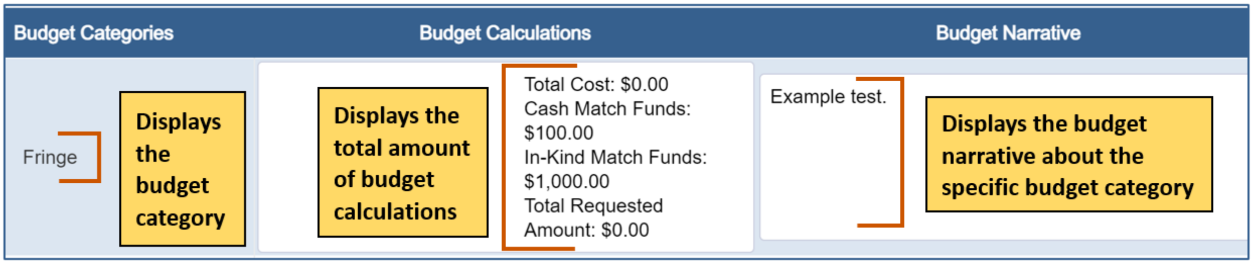


Figure 175: Save Budget Calculations and Narrative

Add a Parent Category

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

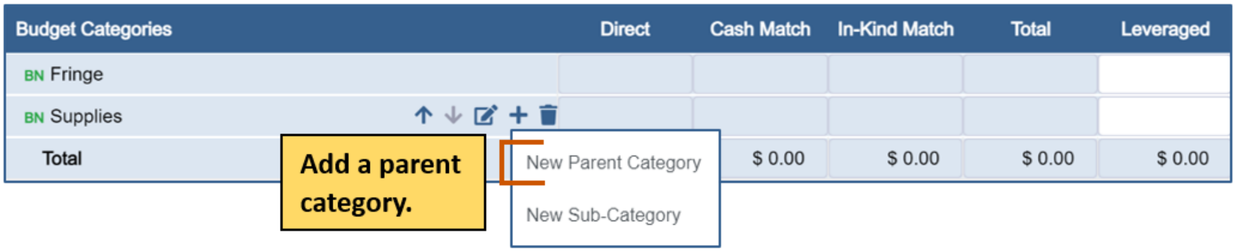


Figure 176: Add Parent Category

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

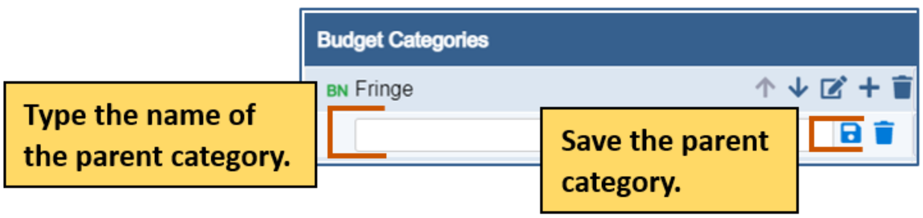


Figure 177: Save Parent Category

Edit a Parent Category

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

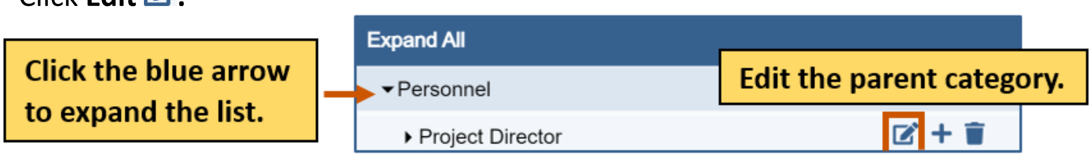


Figure 178: Edit Parent Category

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

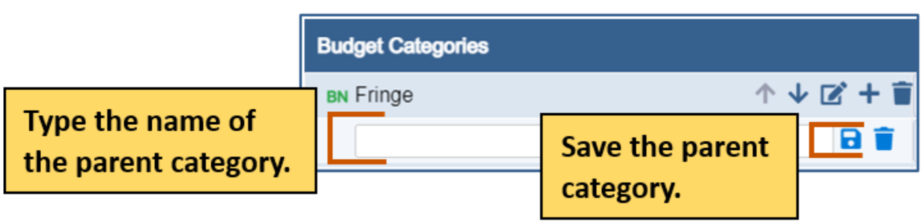


Figure 179: Save Parent Category

Delete a Parent Category

1. Hover over a parent category to display the budget tools.
2. Click **Delete** . A popup appears asking if you are sure you want to delete the sub-category.

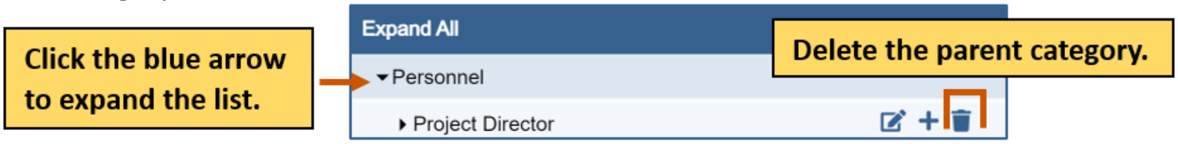


Figure 180: Delete Parent Category

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

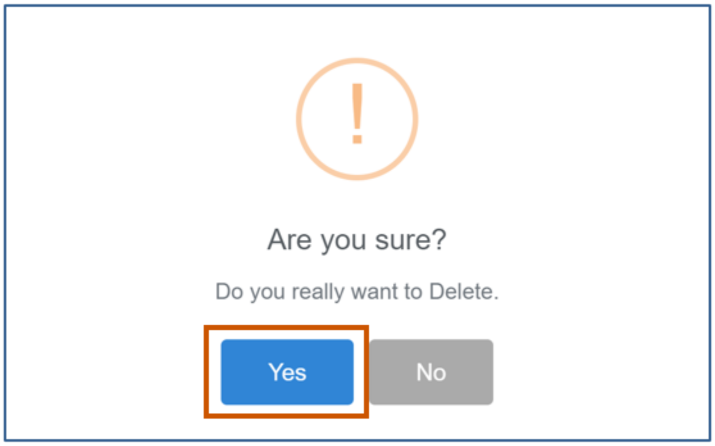


Figure 181: Warning to Delete Category

Add a Sub-Category

1. Click the blue arrow next to a parent category to expand the list.
2. Hover over a sub-category to display the budget tools.
3. Hover over **New** **+**.
4. Click **New sub-Category.**

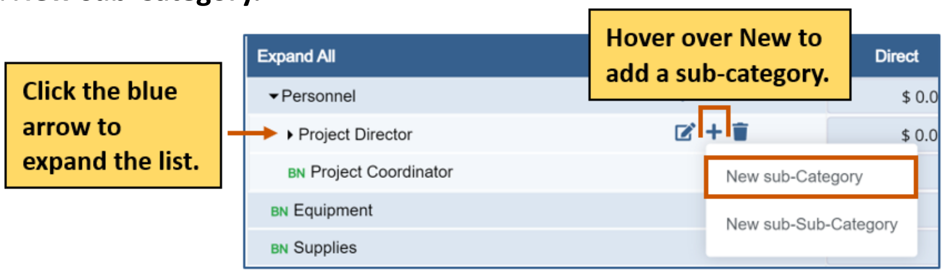


Figure 182: Add Sub-Category

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

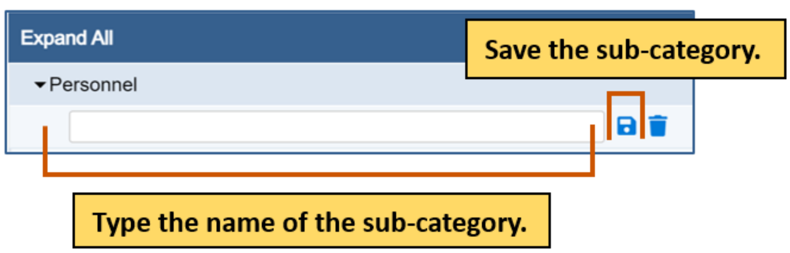


Figure 183: Save Sub-Category

Edit a Sub-Category

1. Click the blue arrow next to a parent category to expand the list.
2. Hover over a sub-category to view the budget tools.
3. Click **Edit** .

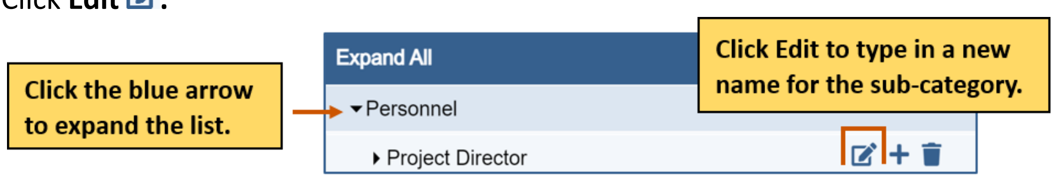


Figure 184: Edit Sub-Category

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

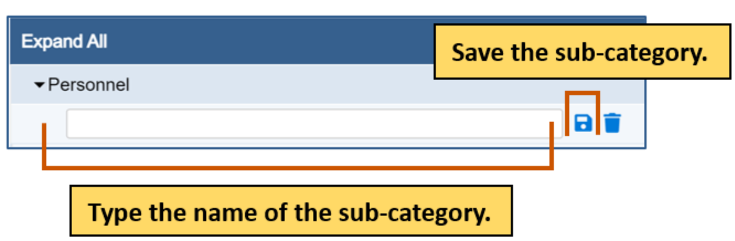


Figure 185: Save Sub-Category

Delete a Sub-Category

1. Click the blue arrow next to a parent category to expand the list.
2. Hover over a sub-category to display the budget tools.
3. Click **Delete**. A popup appears asking if you are sure you want to delete the sub-category.

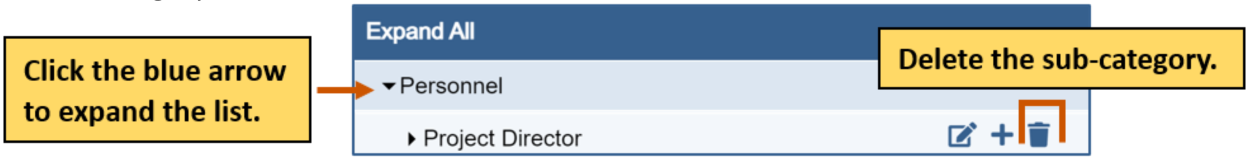


Figure 186: Delete Sub-Category

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

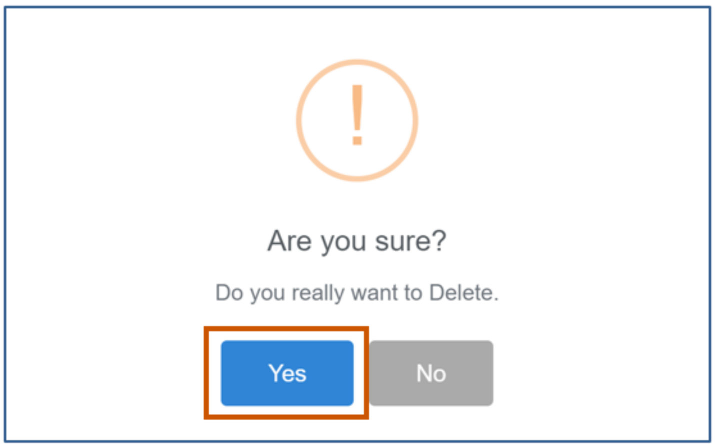


Figure 187: Warning to Delete Category

Add a Sub-Sub-Category

1. Click the blue arrow next to a budget category to expand the list.
2. Click the blue arrow next to a sub-category category to expand the list.
3. Hover over **New** .
4. Click **New sub-Sub-Category.** The new sub-category is added to the grid.

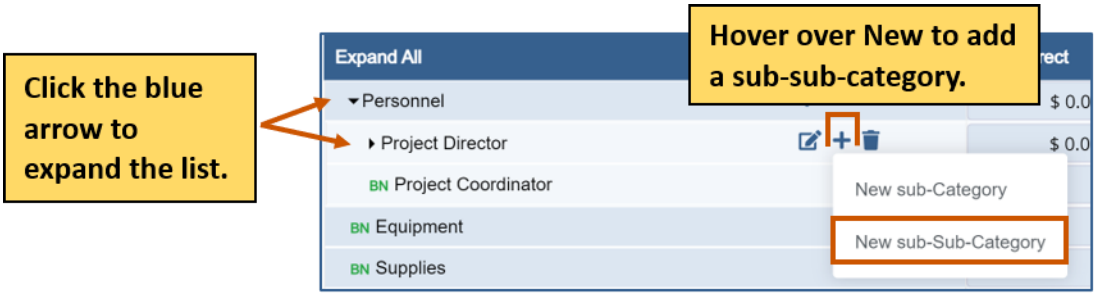


Figure 188: Add Sub-Sub-Category

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

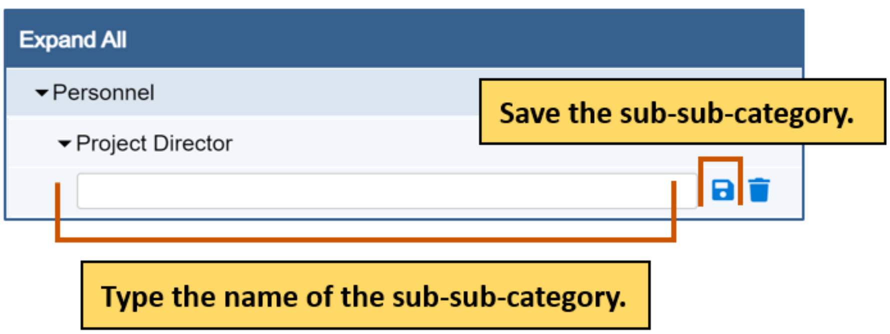


Figure 189: Save Sub-Sub-Category

Edit a Sub-Sub-Category

1. Click the blue arrow next to a budget category to expand the list.
2. Hover over a sub-category to view the budget tools.
3. Click **Edit** .

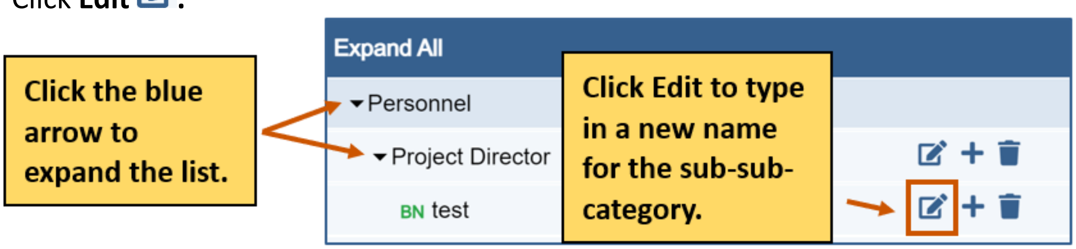


Figure 190: Edit Sub-Sub-Category

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

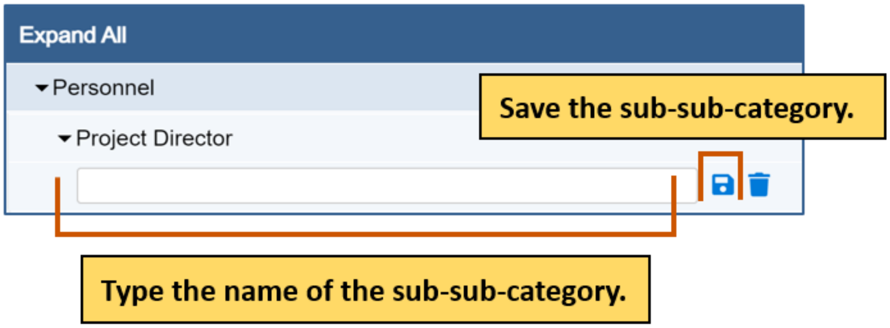


Figure 191: Save Sub-Sub-Category

Delete a Sub-Sub-Category

1. Click the blue arrow next to a budget category to expand the list.
2. Hover over a sub-sub-category to view the budget tools.
3. Click **Delete** . There is a warning asking if you are sure you want to delete the sub-sub-category.

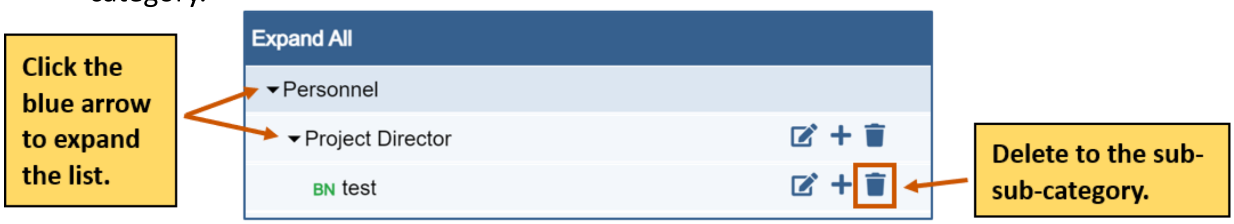


Figure 192: Delete Sub-Sub-Category

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

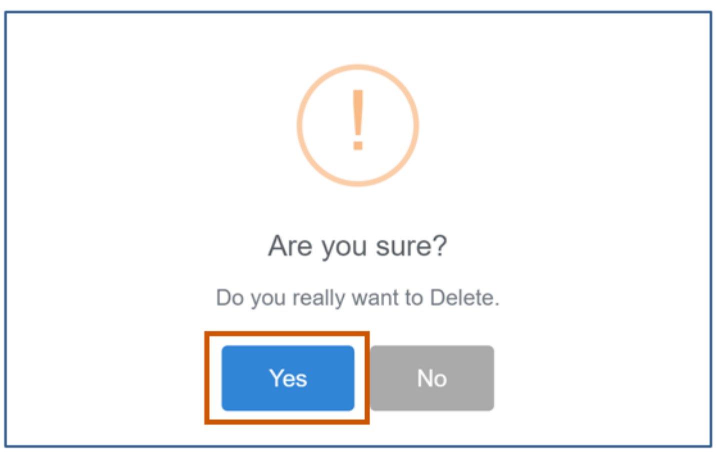
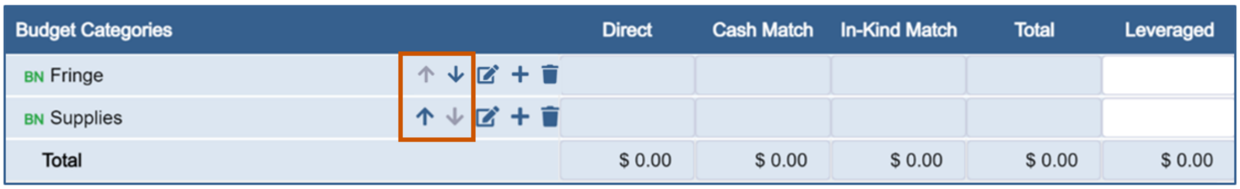


Figure 193: Warning to Delete Category

Move a Category Up or Down on the Grid

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



Budget Categories	Direct	Cash Match	In-Kind Match	Total	Leveraged
BN Fringe					
BN Supplies					
Total	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00

Figure 194: Category Commands

Budget Calculation/Narrative Tools

Note: The ability to add calculations or narratives depend on the properties selected at the time of announcement creation.

You can complete budget calculations and/or narratives for each budget category.

Add a Budget Calculation or Budget Narrative

1. **Optional:** Single-click the green Budget Justification next to a category to show budget calculations and/or the budget narrative. The Budget Justification dialog box appears. The calculations you see depend on the template.

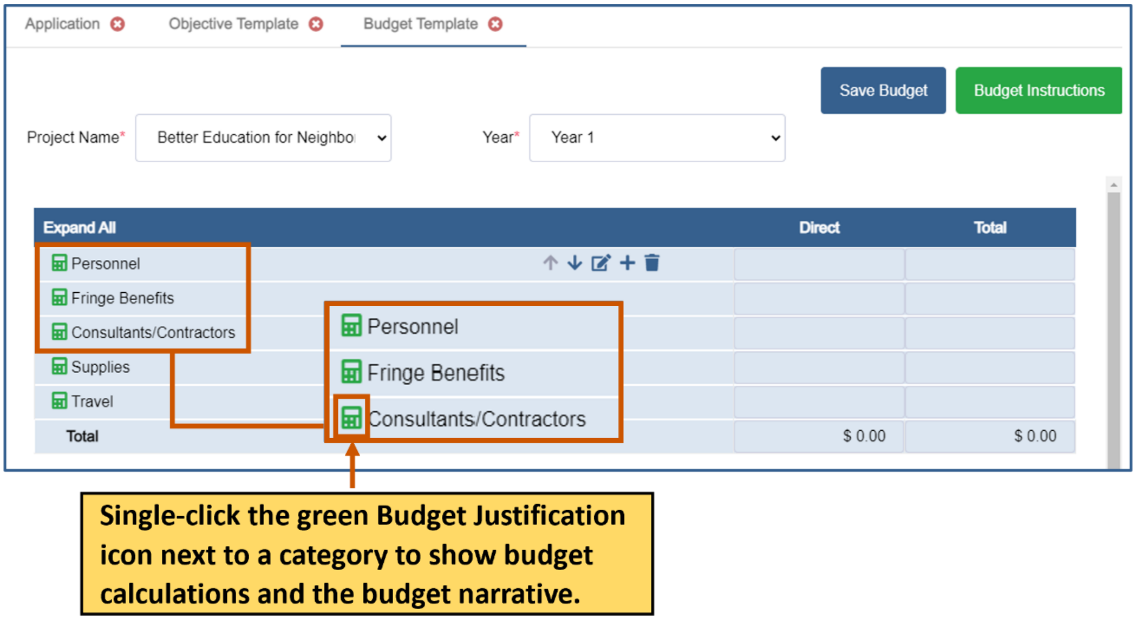


Figure 195: Add Budget Justification

2. Fill in the necessary fields.
3. Click **Save** to save the budget calculation and/or budget narrative. The budget calculation and/or budget narrative appears in the grid below. Repeat steps 1-3 for each budget calculation or budget narrative.

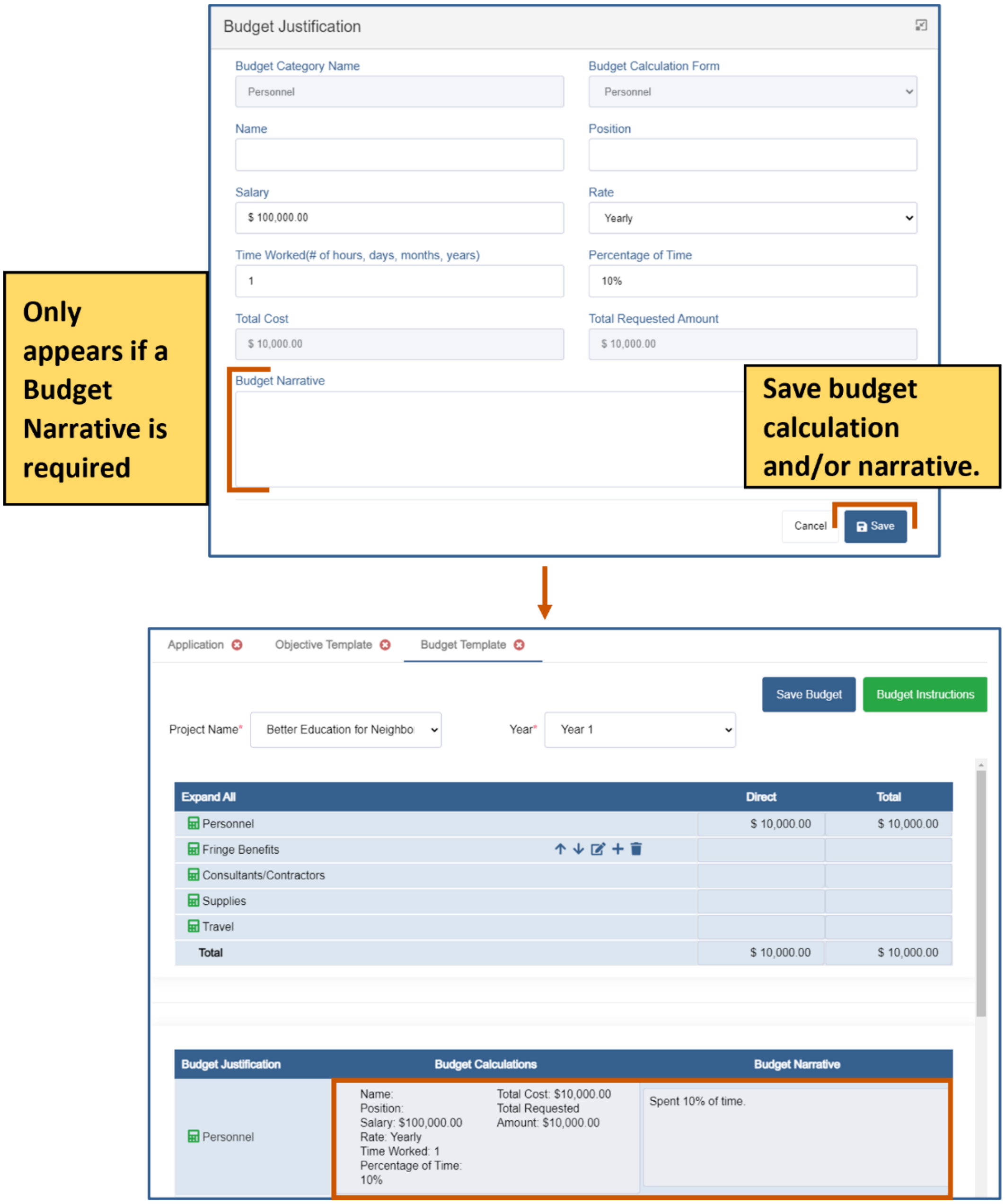


Figure 196: Save Budget Calculation/Narrative

Budget Calculation Template Types

Construction

Calculate how the cost to construction an item.

No Cash Match/In-Kind:

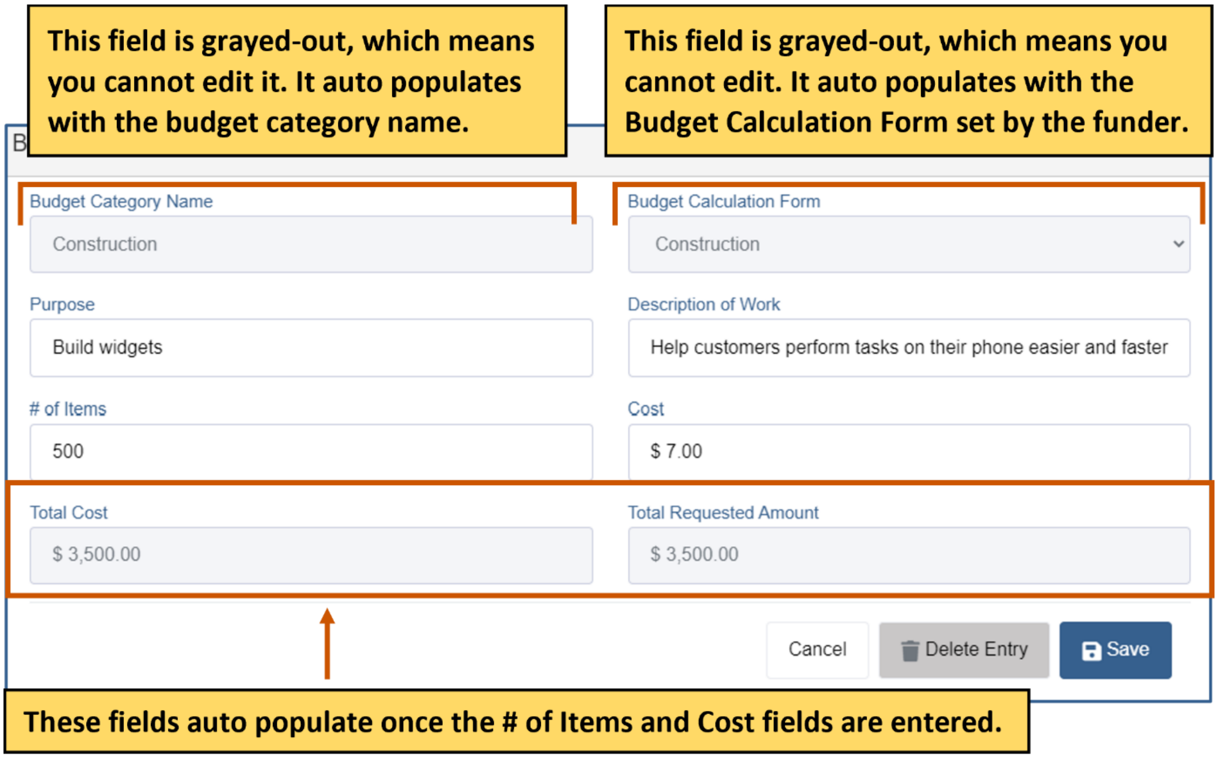


Figure 197: Construction Template – No Cash Match/In-Kind

Cash Match/In-Kind:

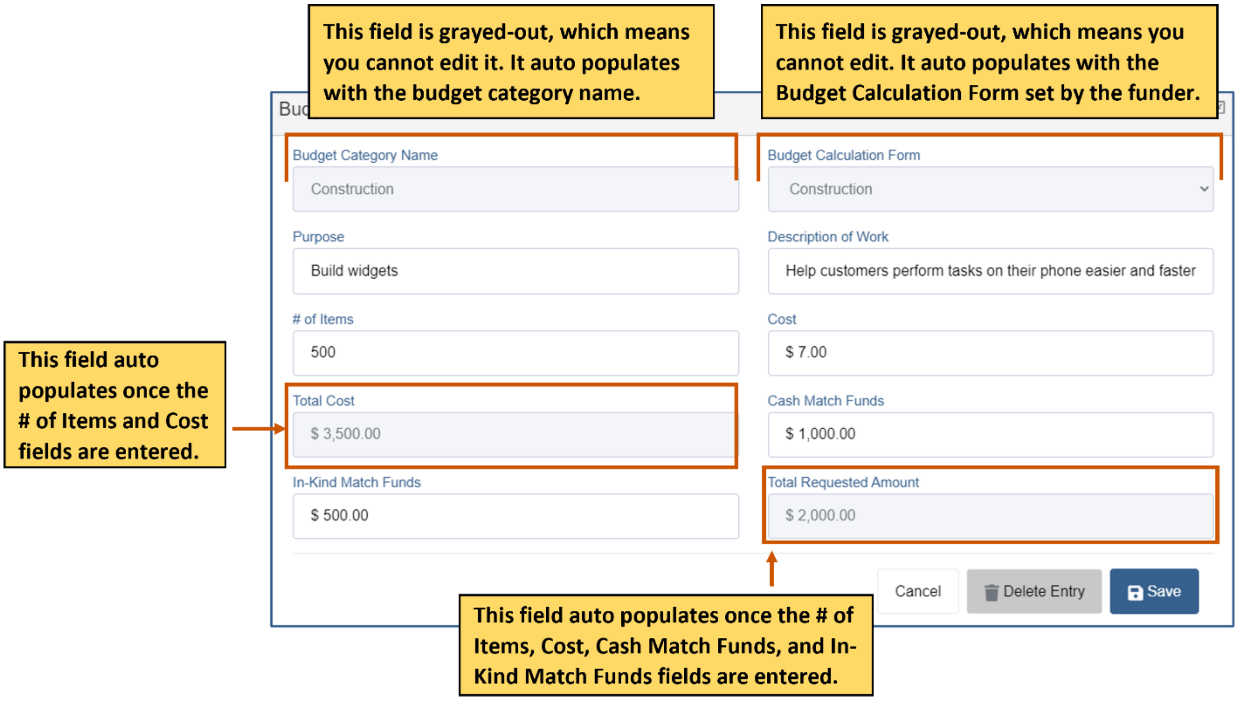


Figure 198: Construction Template – Cash Match/In-Kind

Total Cost = # of Items x Cost
Total Requested = # of Items x Cost – Cash Match Funds – In-Kind Match Funds

Construction Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Purpose	Type in the purpose of the construction.
Description of Work	Type in a description of the construction.
# of Items	Type in the number of items or use the arrow selector.
Cost	Type in the cost of construction. This is a dollar amount.
Total Cost	Total amount is based on the number of items and the cost.

Table 5: Construction Template Form Part 1

Construction Template Fields	Description
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 6: Construction Template Form Part 2

Consult Travel

Calculate travel expenses for each staff member.

No Cash Match/In-Kind:

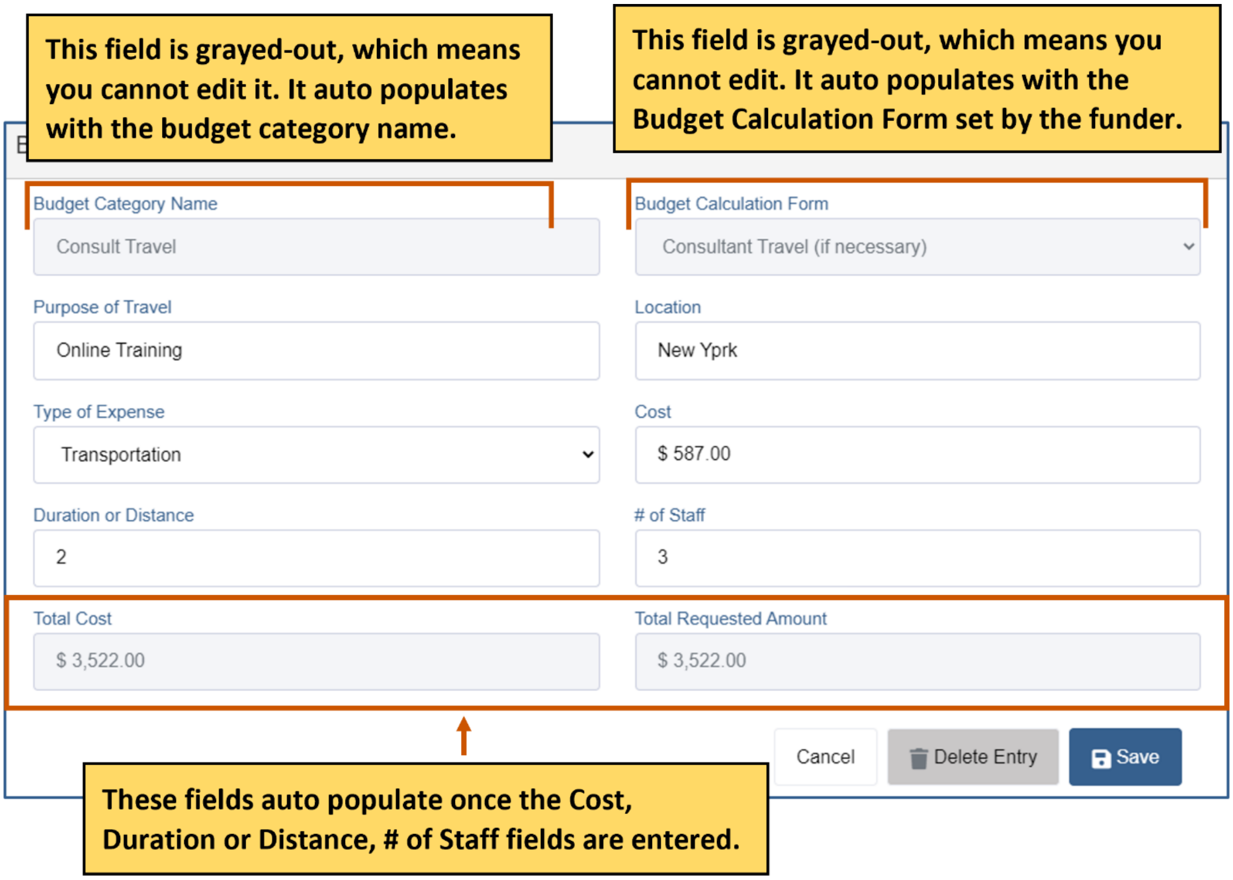


Figure 199: Consult Travel Template – No Cash Match/In-Kind

Cash Match/In-Kind:

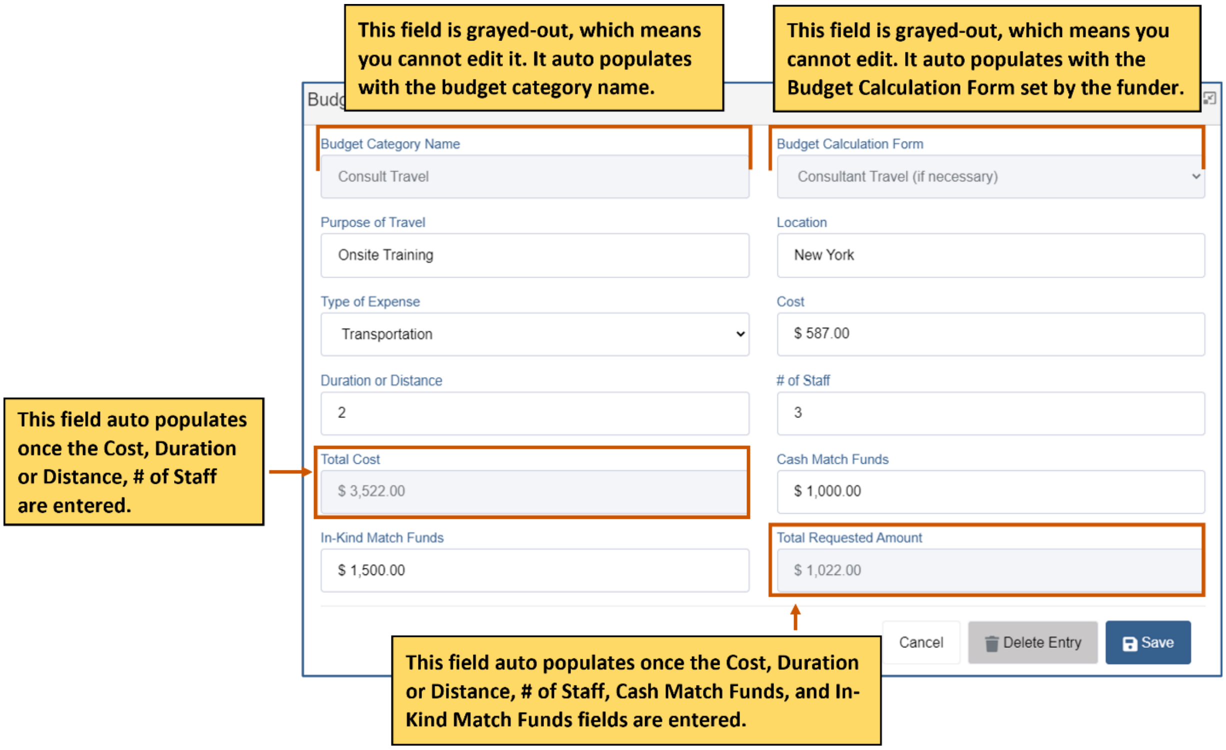


Figure 200: Consult Travel Template – Cash Match/In-Kind

Total Cost = Cost x Duration or Distance x # of Staff
Total Requested = (Cost x Duration or Distance x # of Staff) – Cash Match Funds – In-Kind Match Funds

Consult Travel Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Purpose of Travel	Type in the reason for travelling.
Location	Type the location the staff members are travelling to.
Type of Expenses	Use the drop-down list to choose a type of expense.
Cost	The money amount of the expense.
Duration or Distance	This is the distance or time it took someone to travel. This is a number.

Table 7: Consult Travel Template Form Part 1

Consult Travel Template Fields	Description
# of Staff	Type in the number of staff. This is a number.
Total Cost	Total amount is based on the cost, duration or distance, and # of staff.
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 8: Consult Travel Template Form Part 2

Equipment

Calculate the cost of equipment.

No Cash Match/In-Kind:

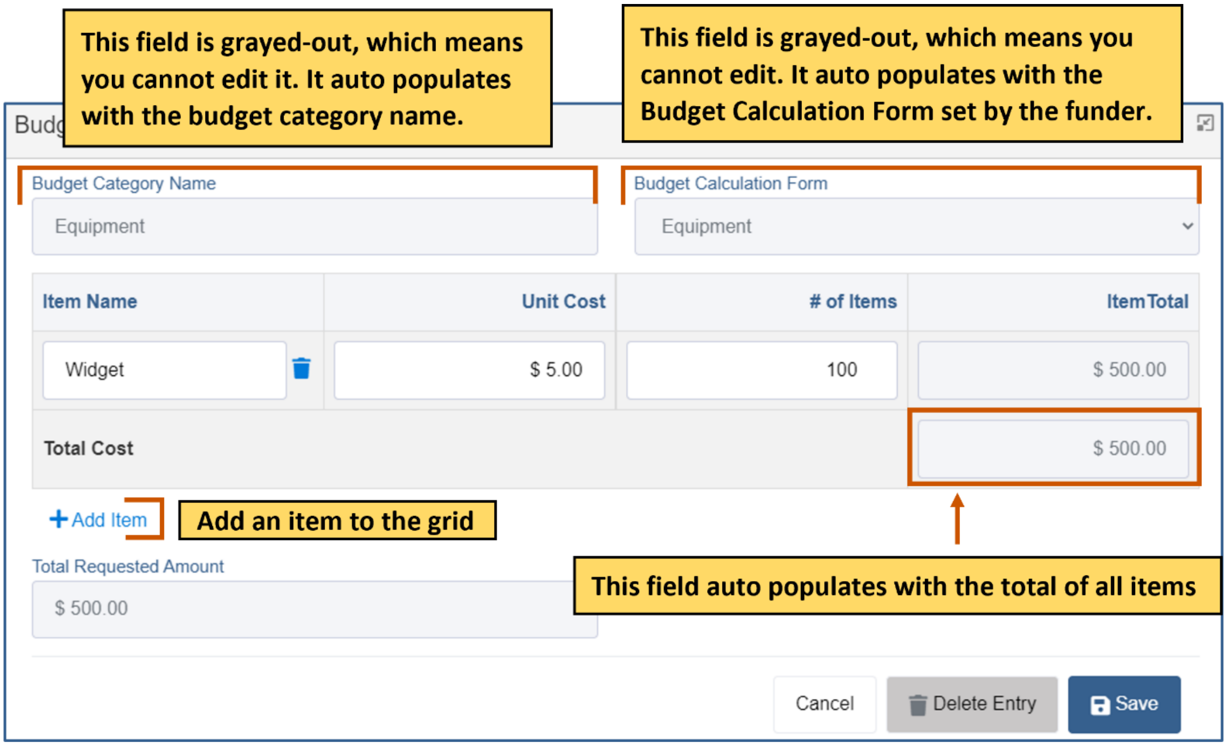


Figure 201: Equipment Template – No Cash Match/In-Kind

Cash Match/In-Kind:

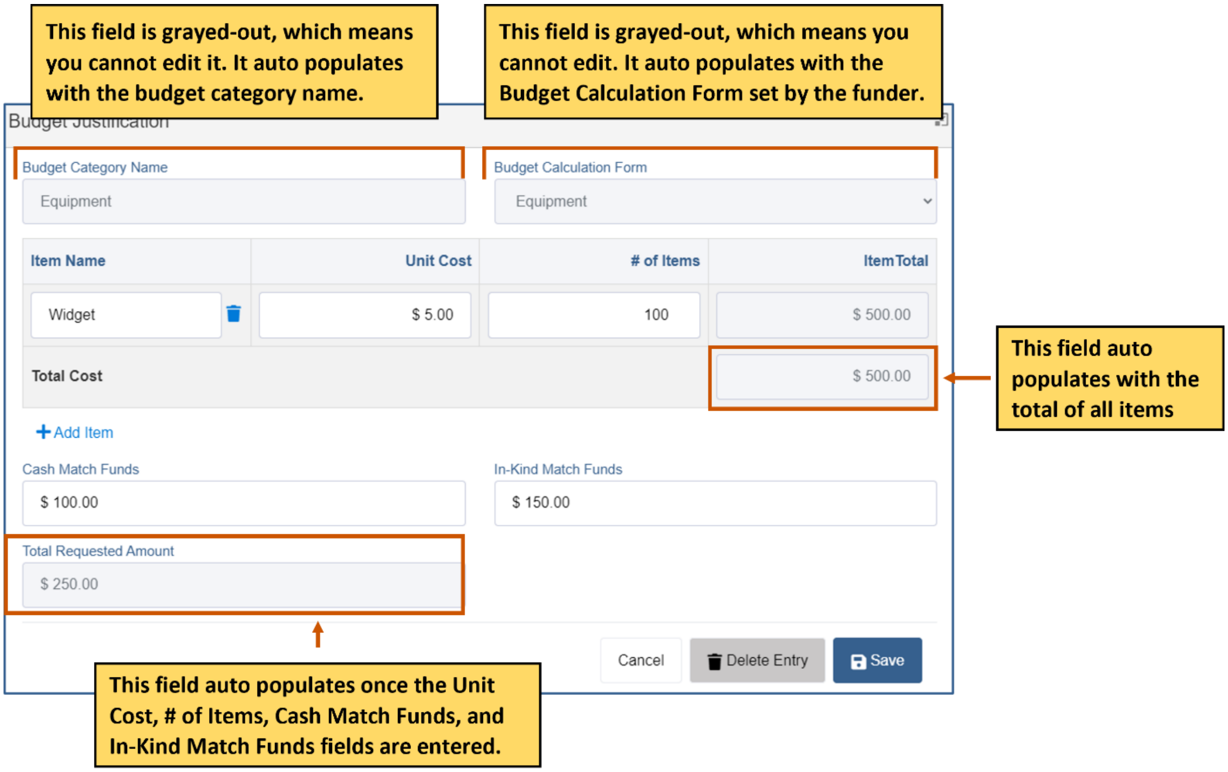


Figure 202: Equipment Template – Cash Match/In-Kind

Item Total = Unit Cost x # of Items
Total Cost = Unit Cost x # of Items x number of items you input
Total Requested = (Unit Cost x # of Items x number of items inputted) – Cash Match Funds – In-Kind Match Funds

Add an Item

1. Click **+ Add Item.** The Item grid is now editable.

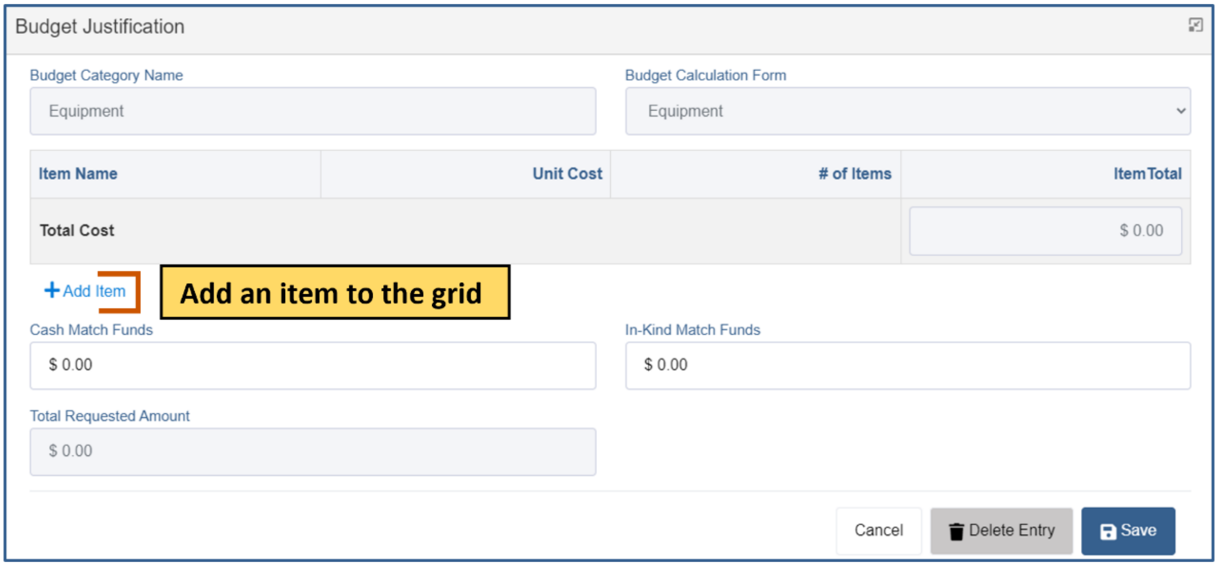


Figure 203: Equipment – Add Item

2. Enter the data. Repeat steps 1 and 2 for each item you wish to add.
3. Click **Save.** The budget calculations appear in the grid.

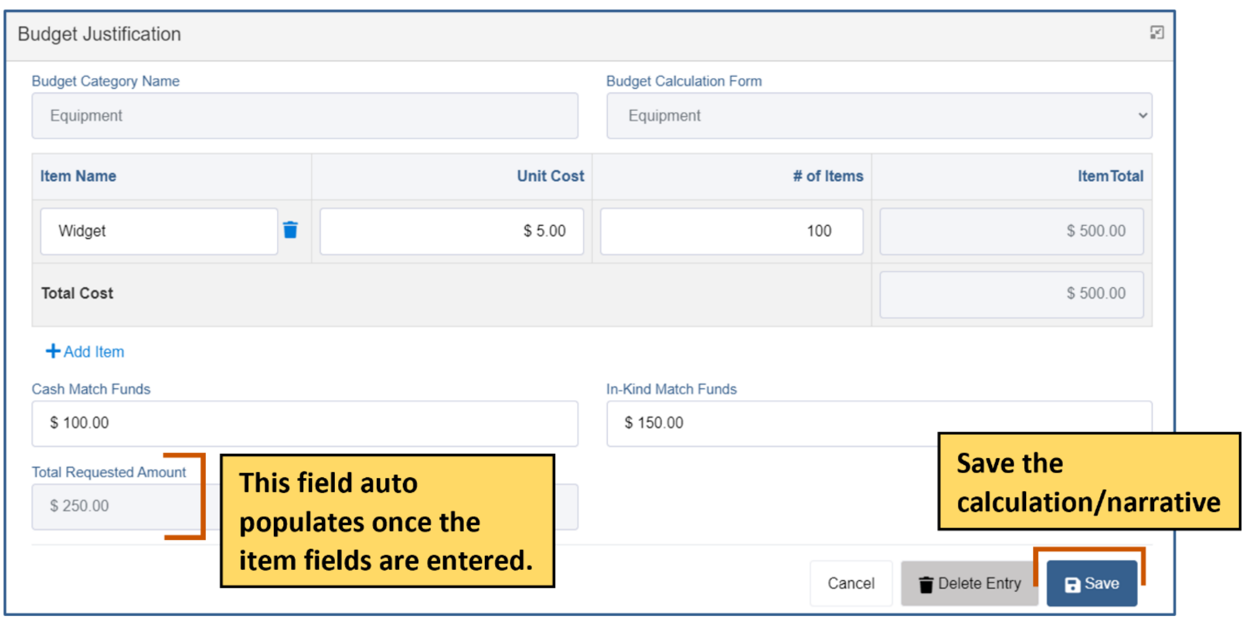


Figure 204: Save Equipment Calculation/Narrative

Equipment Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Item Name	The name of the Budget Calculation form you are filling out.
Unit Cost	Cost of the unit.
# of items	Type in the number of items.
Item Total	Total amount of all the items.
Total Cost	Total amount of all the items. Total cost is based on the unit cost, # of items, and the number of items you input.
Add Item	Add an item to the grid.
Total Requested Amount	Total requested amount is based on the unit cost, number of Items, and the number of items you inputted. The cash match funds, and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 9: Equipment Template Form

Equipment (Pro Rated)

Calculate the cost of equipment based on how long it is used.

No Cash Match/In-Kind:

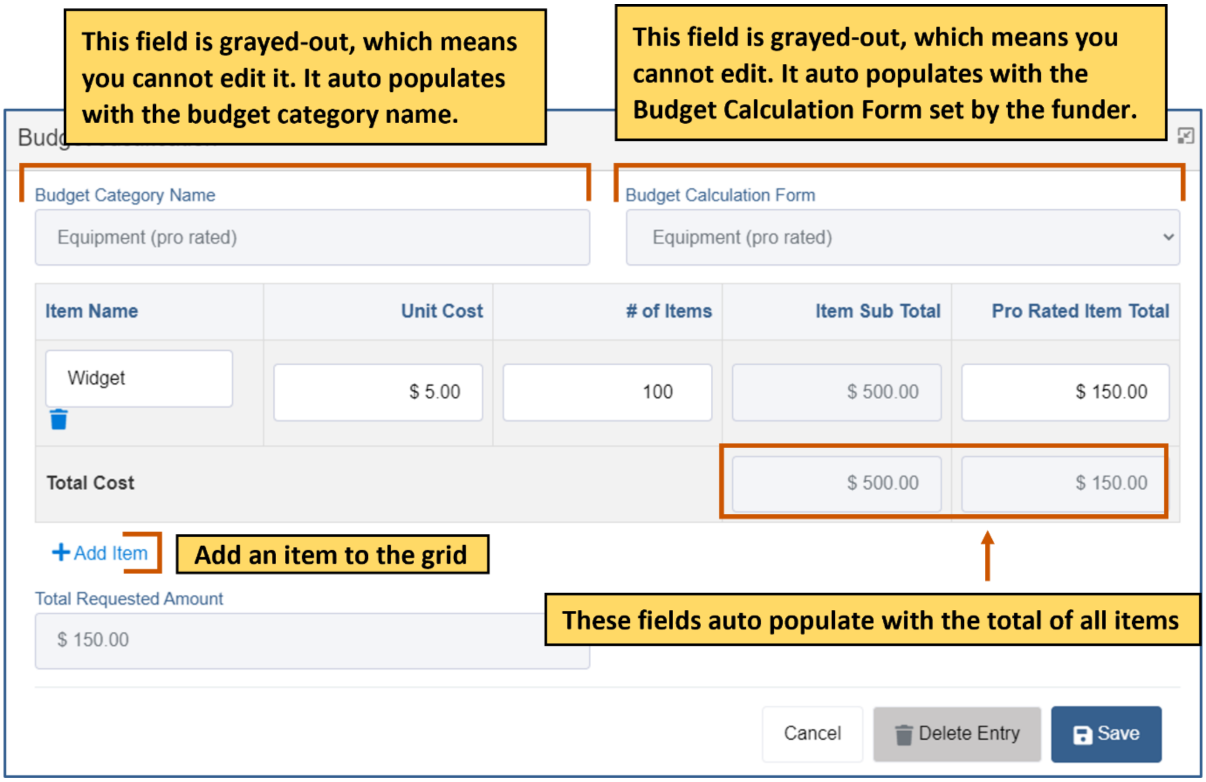


Figure 205: Equipment(Pro-Rated) Template – No Cash Match/In-Kind

Cash Match/In-Kind:

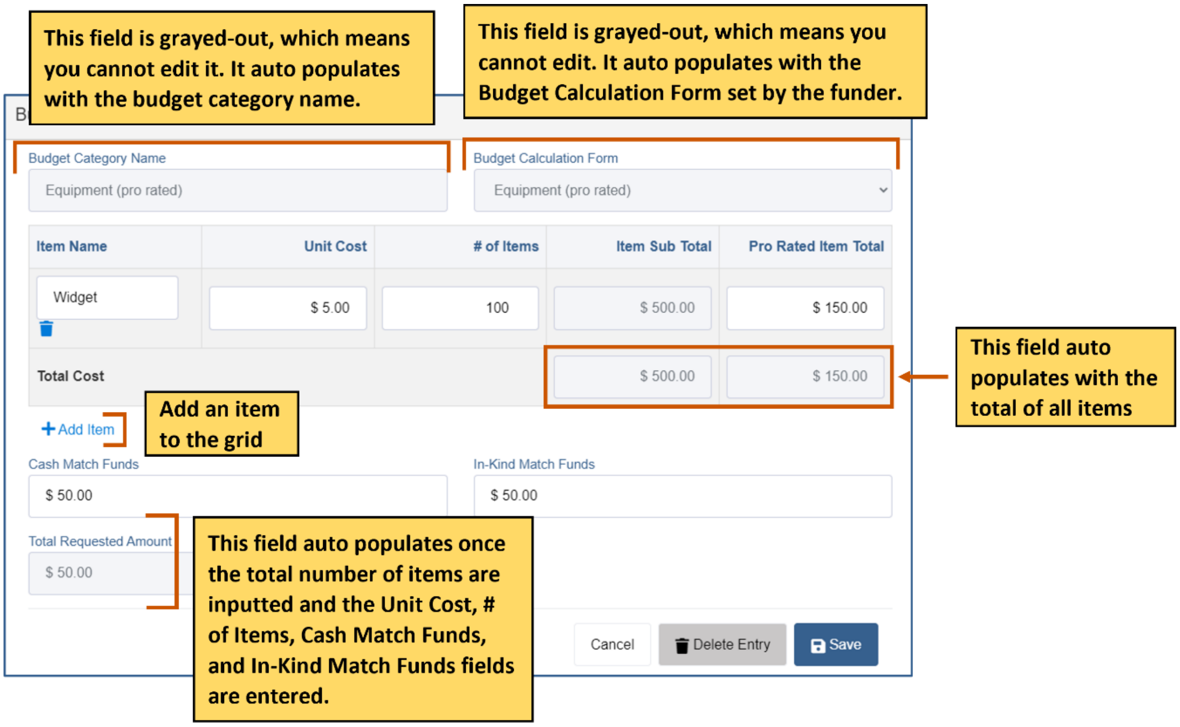


Figure 206: Equipment(Pro-Rated) Template – Cash Match/In-Kind

Total Cost (Item Sub Total) = Unit Cost x # of Items x the number of items inputted
Total Cost (Pro Rated Item Total) = Total of all the line items
Total Requested Amount = (Pro Rated Item Total x the total of all the line items) – Cash Match Funds – In-Kind Match Funds

Add an Item

1. Click **+ Add Item.** The Item grid is now editable.

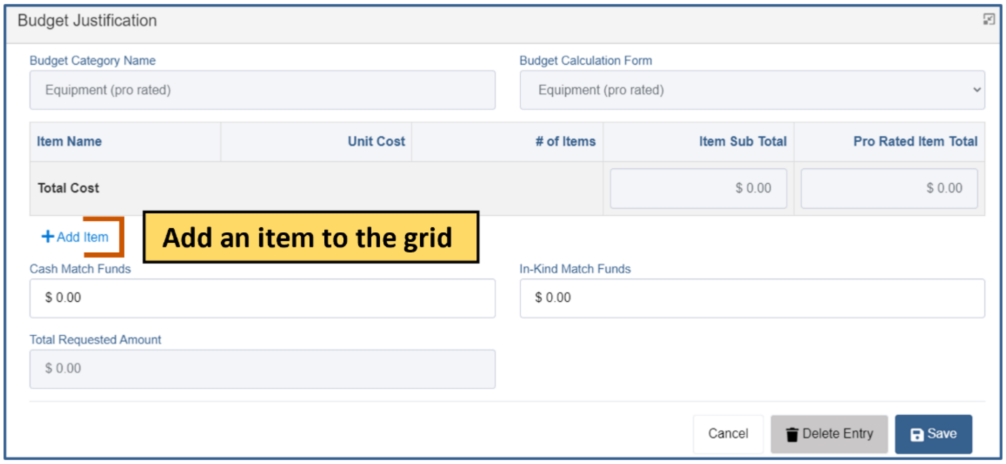


Figure 207: Equipment (Pro Rated) – Add Item

2. Enter the data. Repeat steps 1 and 2 for each item you wish to add.
3. Click **Save.** The budget calculations appear in the grid.

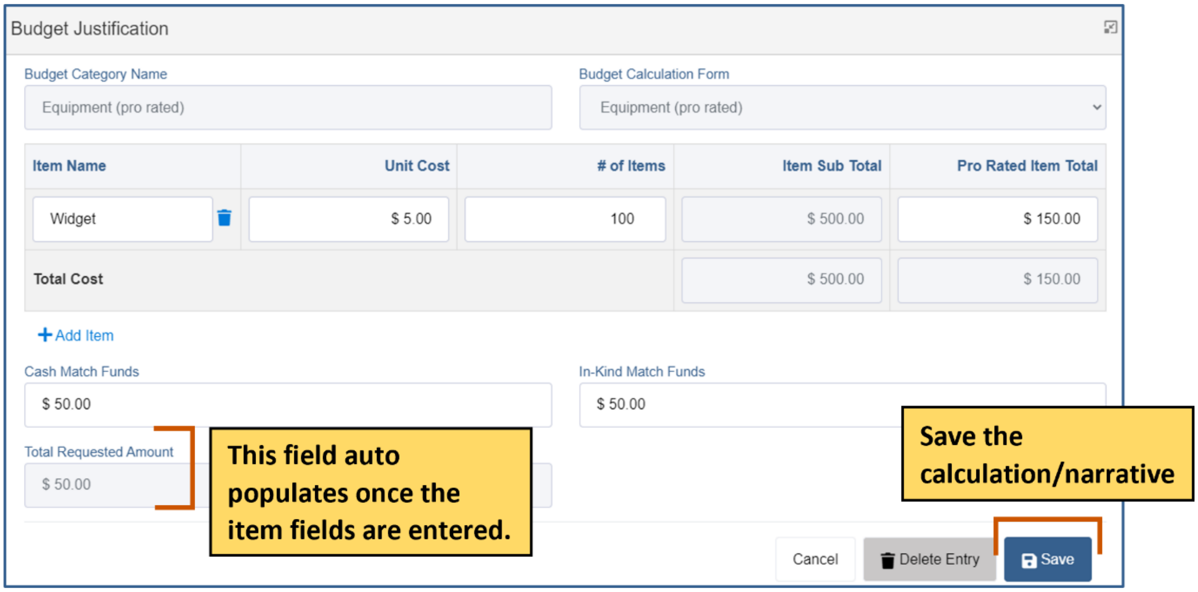


Figure 208: Save Equipment (Pro Rated) Calculation/Narrative

Equipment (Pro Rated) Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Item Name	The name of the Budget Calculation form you are filling out.
Unit Cost	Cost of the unit.
# of items	Type in the number of items.
Item Sub Total	Total amount of all the items.
Pro Rated Item Total	Total amount of the item was prorated for.
Add Item	Add an item to the grid.
Total Cost	Total amount of all the items. The Total Cost comes from a total sum of the “Pro Rated Item Total” column.
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 10: Equipment (Pro Rated) Template Form

Fringe Benefits

Calculate the amount used for extra benefits for employees.

No Cash Match/In-Kind:

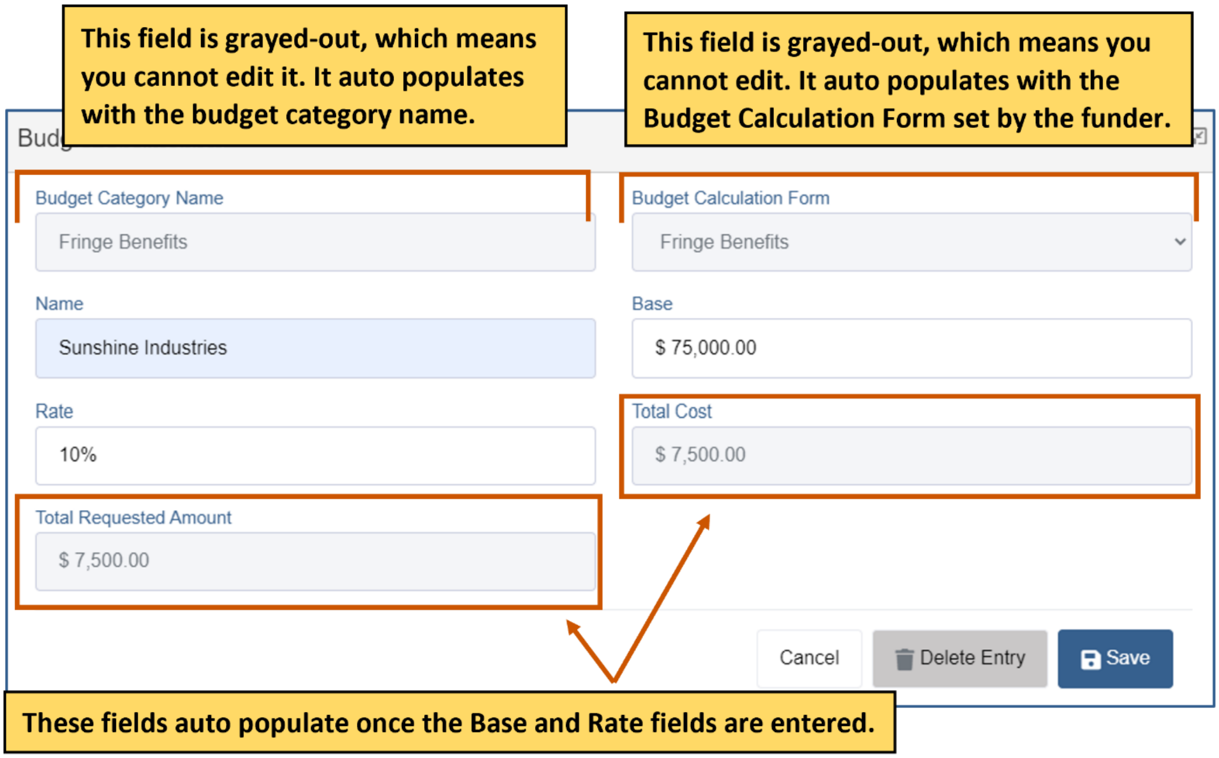


Figure 209: Fringe Benefits Template – No Cash Match/In-Kind

Cash Match/In-Kind:

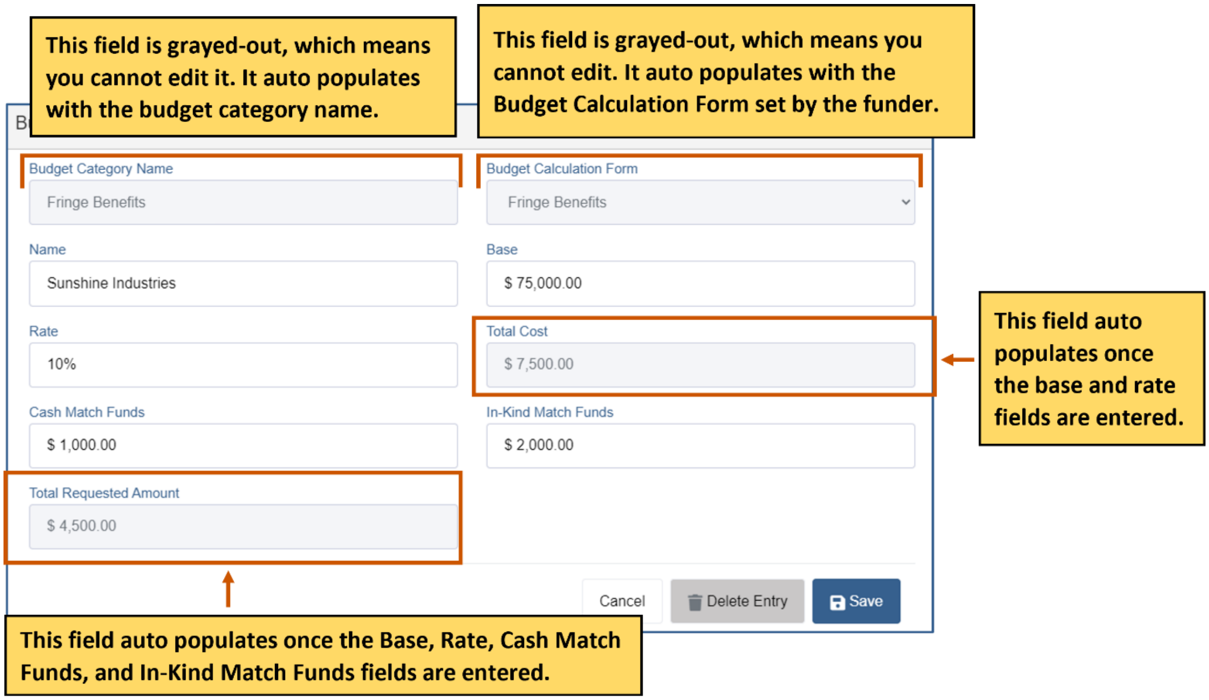


Figure 210: Fringe Benefits Template – Cash Match/In-Kind

Total Cost = Base x Rate
Total Requested = (Base x Rate) – Cash Match Funds – In-Kind Funds

Fringe Benefits Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Name	Name of employee or position.
Base	Initial salary amount of employee. This is a dollar amount.
Rate	The rate the employee spent on the project. This is a percentage.
Total Cost	Total amount based on the rate percentage and the base salary.
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.

Table 11: Fringe Benefits Template Form Part 1

Fringe Benefits Template Fields	Description
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 12: Fringe Benefits Template Form Part 2

Indirect Costs

Calculate costs that are not directly related to the grant.

No Cash Match/In-Kind:

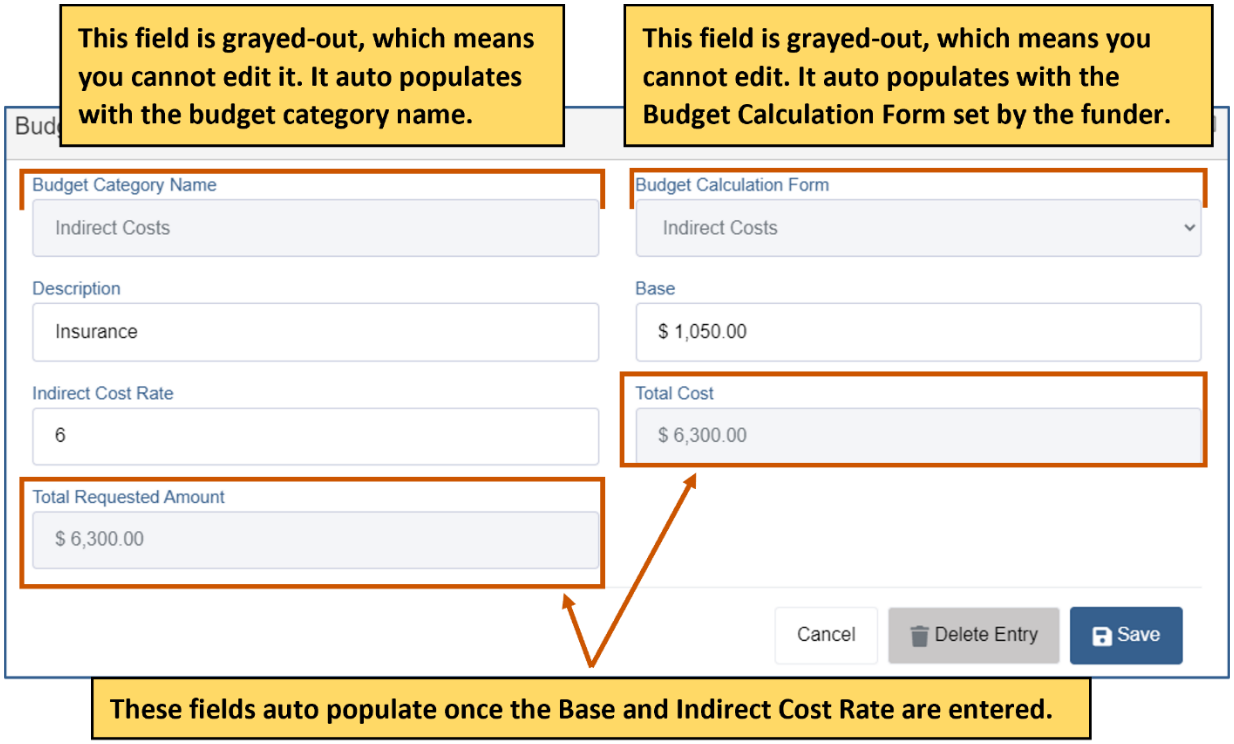


Figure 211: Indirect Costs Template – No Cash Match/In-Kind

Cash Match/In-Kind:

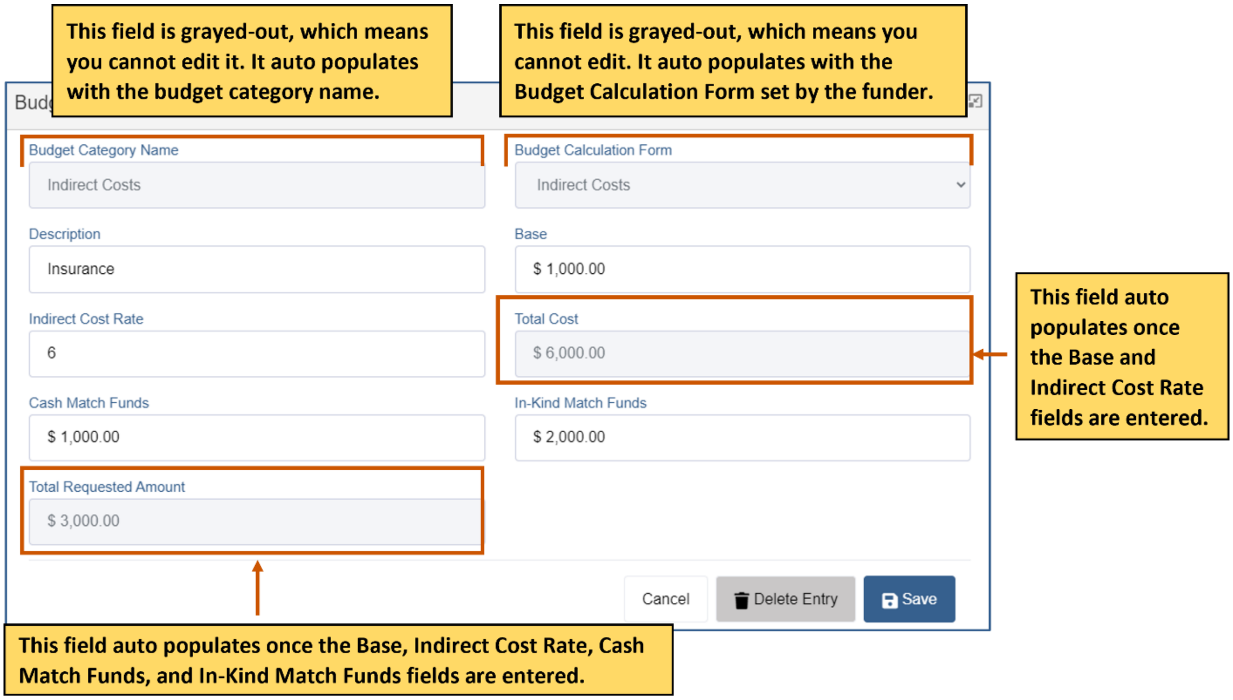


Figure 212: Indirect Costs Template – Cash Match/In-Kind

Total Cost = Base x Indirect Cost Rate
Total Requested Amount = (Base x Indirect Cost Rate) – Cash Match Funds – In-Kind Match Funds

Indirect Cost Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Description	Type in the description of the indirect cost.
Base	The initial amount of the indirect cost.
Indirect Cost Rate	Salary amount of employee. This is a number value.
Total Cost	Total cost is based on the base salary and indirect cost rate.
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.

Table 13: Indirect Costs Template Form Part 1

Indirect Cost Template Fields	Description
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 14: Indirect Costs Template Form Part 1

Personnel

Calculate how much time was spent working on a budget category based on a person's salary. If cash-match, in-kind, and leveraged are shown, the Cash-Match and In-Kind Match fields appear.

No Cash Match/In-Kind:

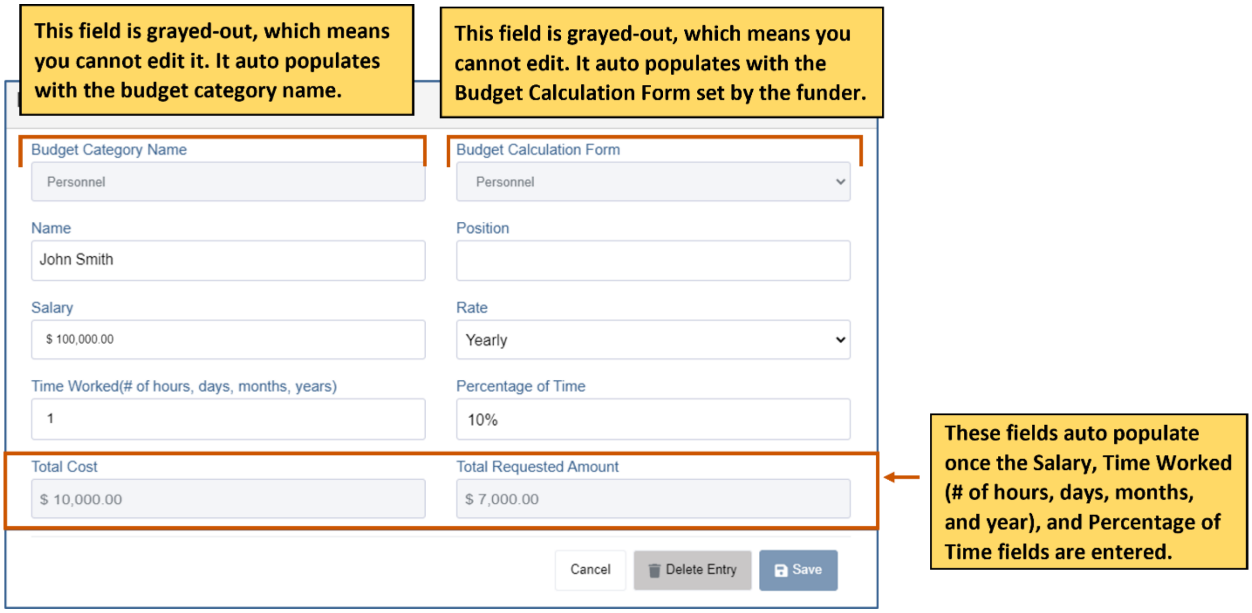


Figure 213: Personnel Template – No Cash Match/In-Kind

Cash Match/In-Kind:

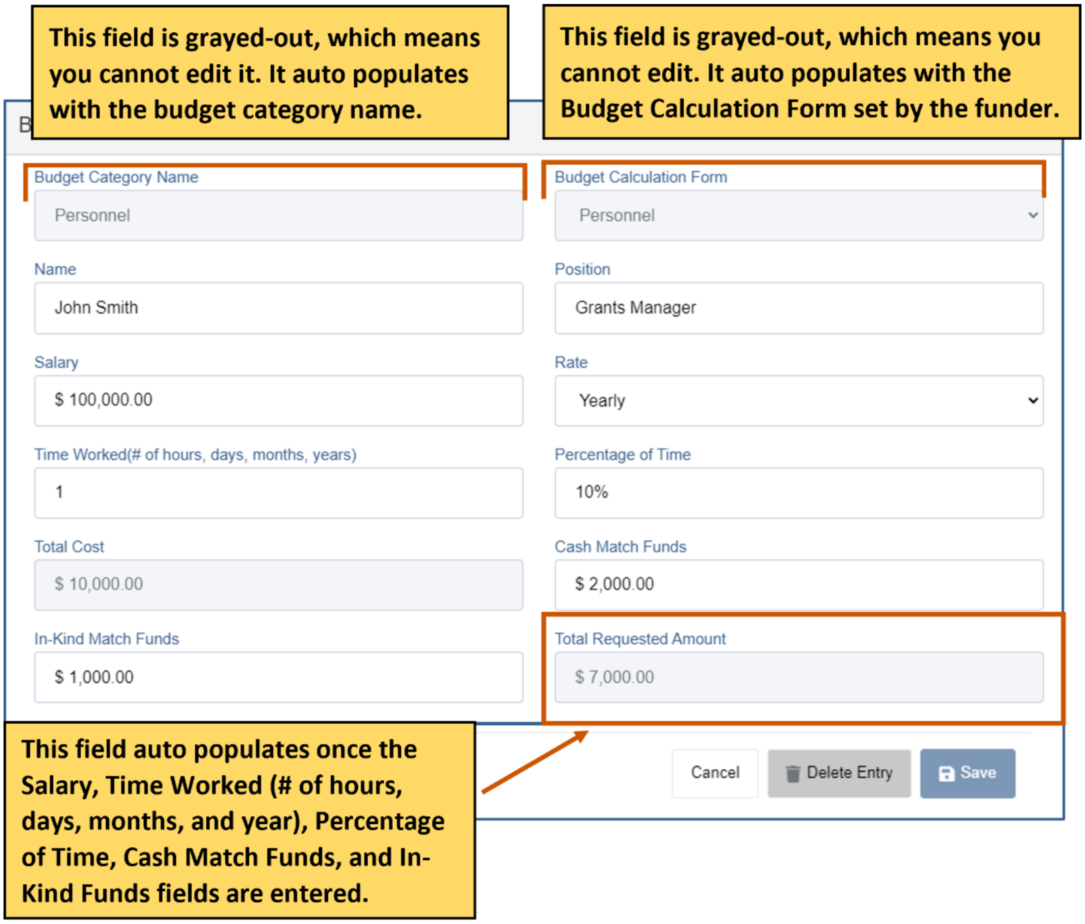


Figure 214: Personnel Template – Cash Match/In-Kind

Total Cost = Salary x Time Worked x Percentage of Time
Total Requested = (Salary x Time Worked x Percentage of Time) – Cash Match Funds – In-Kind Funds

Personnel Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Name	Name of employee.
Position	Position of employee.
Salary	Salary amount of employee. This is a dollar amount.

Table 15: Personnel Template Form Part 1

Personnel Template Fields	Description
Rate	The rate the employee spent on the project. Rates include: • Hourly • Daily • Weekly • Yearly
Time Worked (# of hours, days, months, years)	The time worked on the category. Give the time in # of hours, days, months, or years.
Percentage of Time	Percentage of time the employee will work on the project. For example, 100% of their time over 1 year. This is a percentage value.
Total Cost	Total amount based on the salary, time worked, and percentage of time.
Total Requested Amount	Total requested amount based on the salary, time worked, and percentage of time (and cash match and in-kind match if necessary).
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 16: Personnel Template Form Part 2

Procurement Contracts

Calculate the costs of goods or services purchased from a seller.

No Cash Match/In-Kind:

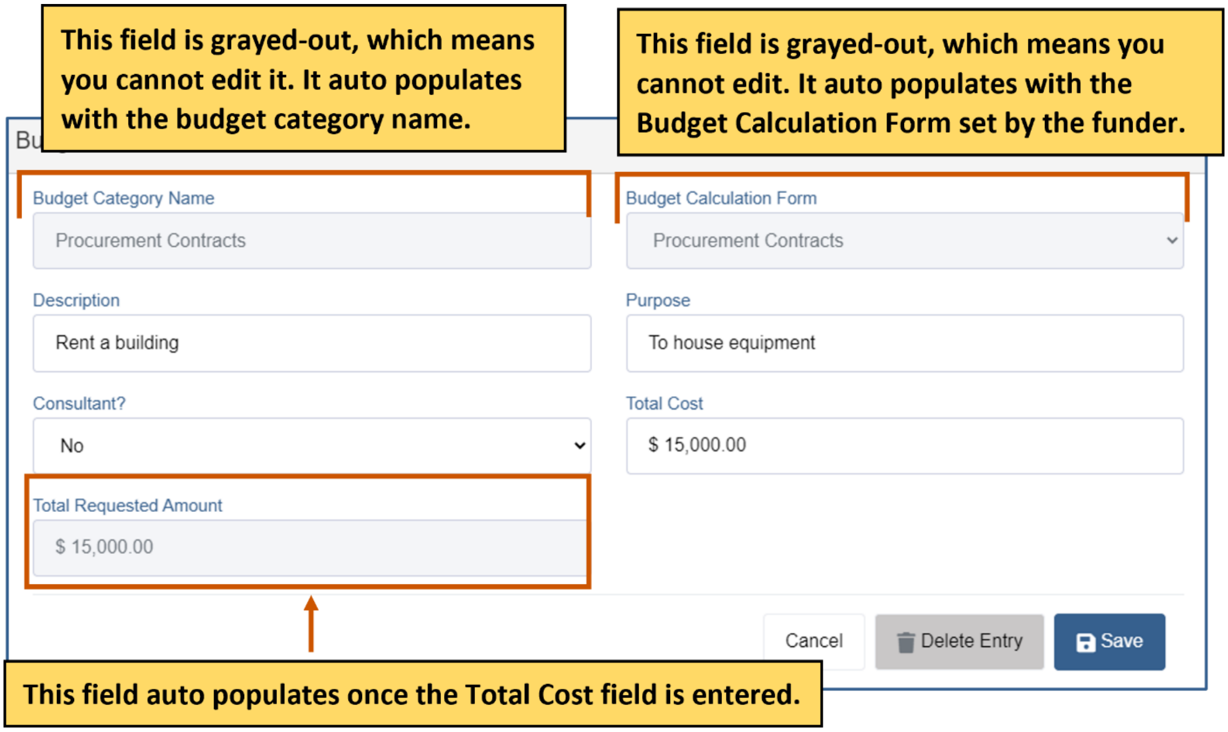


Figure 215: Procurement Contracts Template – No Cash Match/In-Kind

Cash Match/In-Kind:

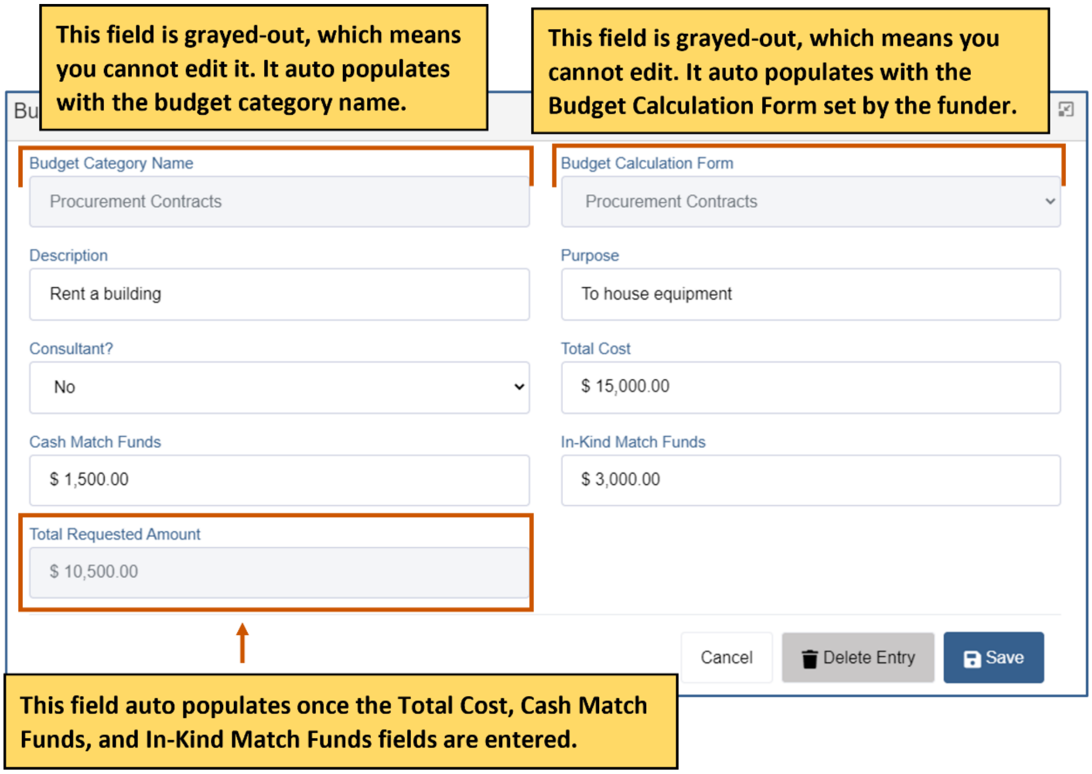


Figure 216: Procurement Contracts Template – Cash Match/In-Kind

Total Requested Amount = Total Cost – Cash Match Funds – In-Kind Match Funds

Procurement Contracts Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Description	Type in the description of the contract.
Purpose	Type in the purpose of the contract.
Consultant	Use the drop-down to choose whether there is a consultant.
Total Cost	Type in the total cost of the contract.
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.

Table 17: Procurement Contracts Template Form Part 1

Procurement Contracts Template Fields	Description
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 18: Procurement Contracts Template Form Part 2

Salary By Position

Calculate the salary of employees by position.

No Cash Match/In-Kind:

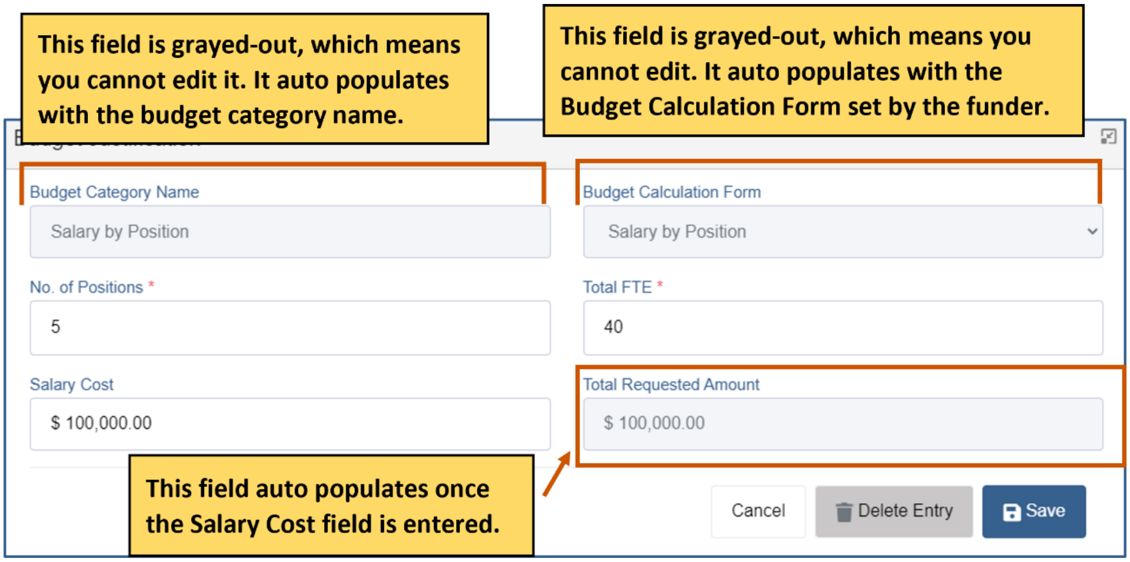


Figure 217: Salary by Position Template – No Cash Match/In-Kind

Cash Match/In-Kind:

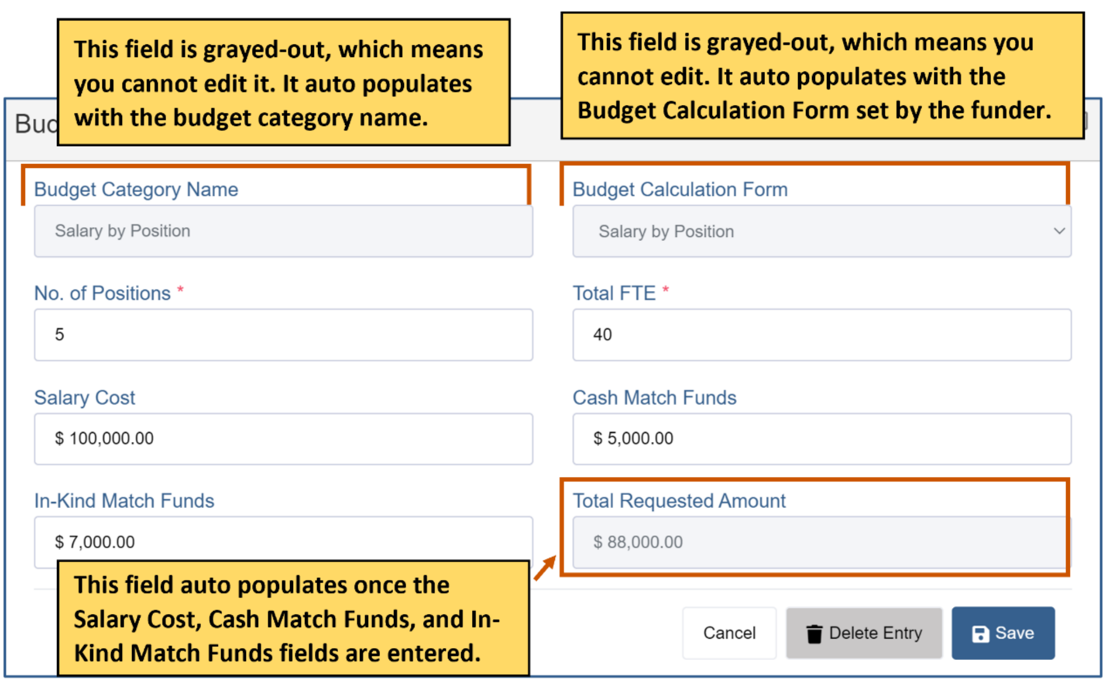


Figure 218: Salary by Position Template – Cash Match/In-Kind

Total Requested Amount = Salary Cost – Cash Match Funds – In-Kind Match Funds

Salary by Position Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
No. of Positions	Type in the number of employees working in the position or use the arrow selector.
Total FTE	Type in the total FTE or use the arrow selector.
Salary Cost	Total salaries of all employee in the position. This is a dollar amount.
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 19: Salary by Position Template Form

Subaward (subgrants)

Calculate the cost of the subaward (subgrant).

No Cash Match/In-Kind:

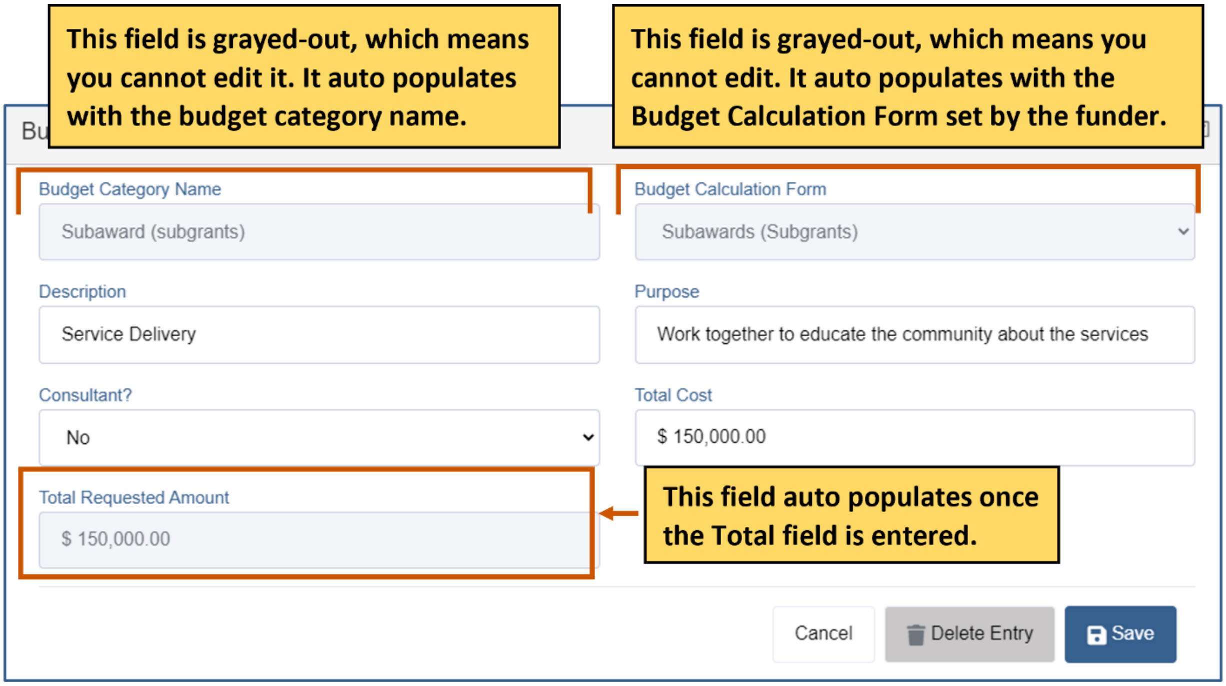


Figure 219: Subaward (Subgrant) Template – No Cash Match/In-Kind

Cash Match/In-Kind:

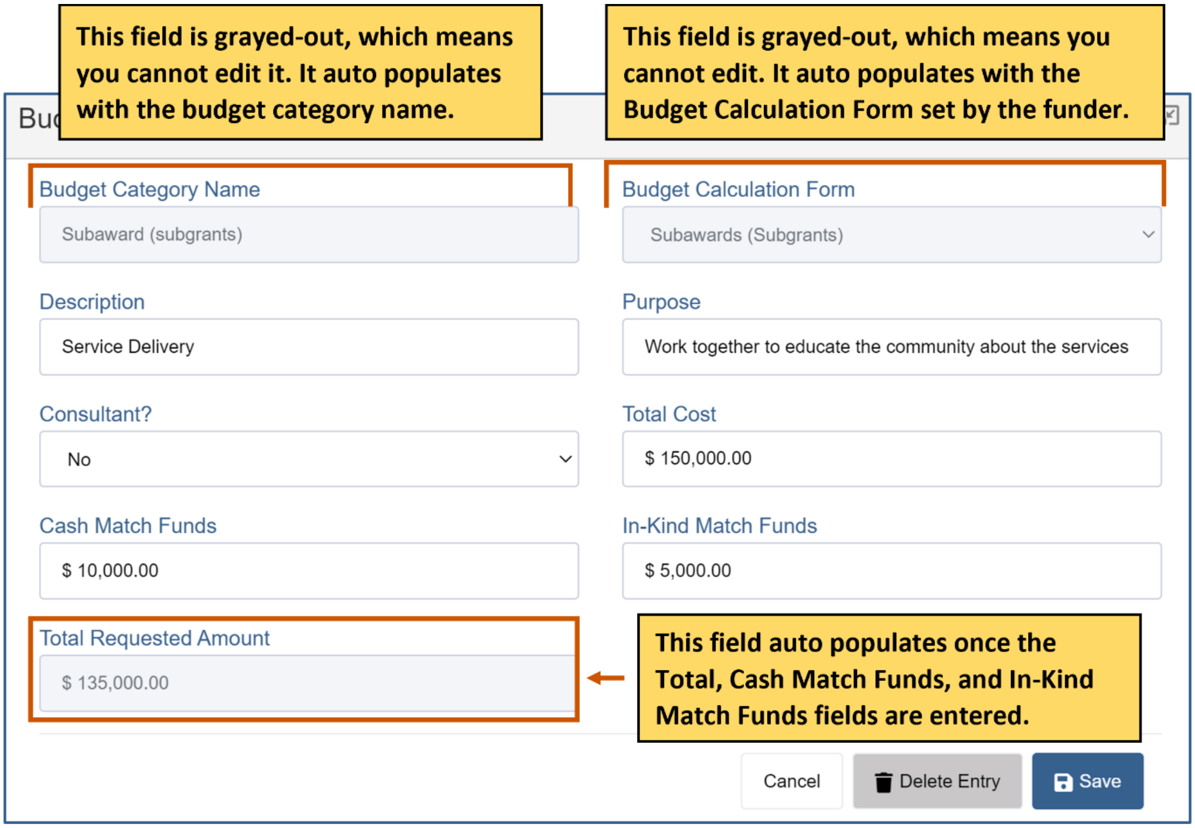


Figure 220: Subaward (Subgrant) Template – Cash Match/In-Kind

Total Requested = Total Cost – Cash Match Funds – In-Kind Match Funds

Subaward (Subgrant) Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Description	Type in the description of the subaward (subgrant).
Purpose	Type in the purpose of the subaward (subgrant).
Consultant	Use the drop-down to choose whether there is a consultant.
Total Cost	Total amount based on the total cost.

Table 20: Subaward (Subgrant) Template Form Part 1

Subaward (Subgrant) Template Fields	Description
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 21: Subaward (Subgrant) Template Form Part 2

Supplies

Calculate the cost of supplies.

No Cash Match/In-Kind:

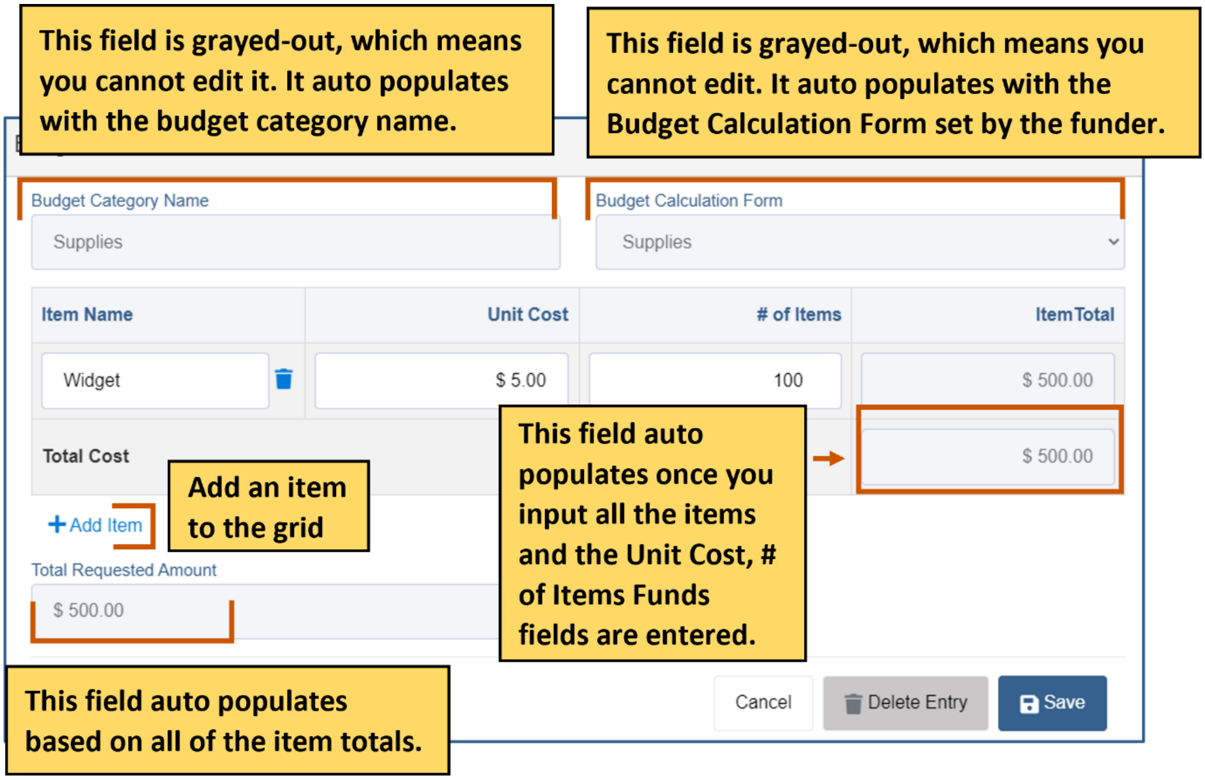


Figure 221: Supplies Template – No Cash Match/In-Kind

Cash Match/In-Kind:

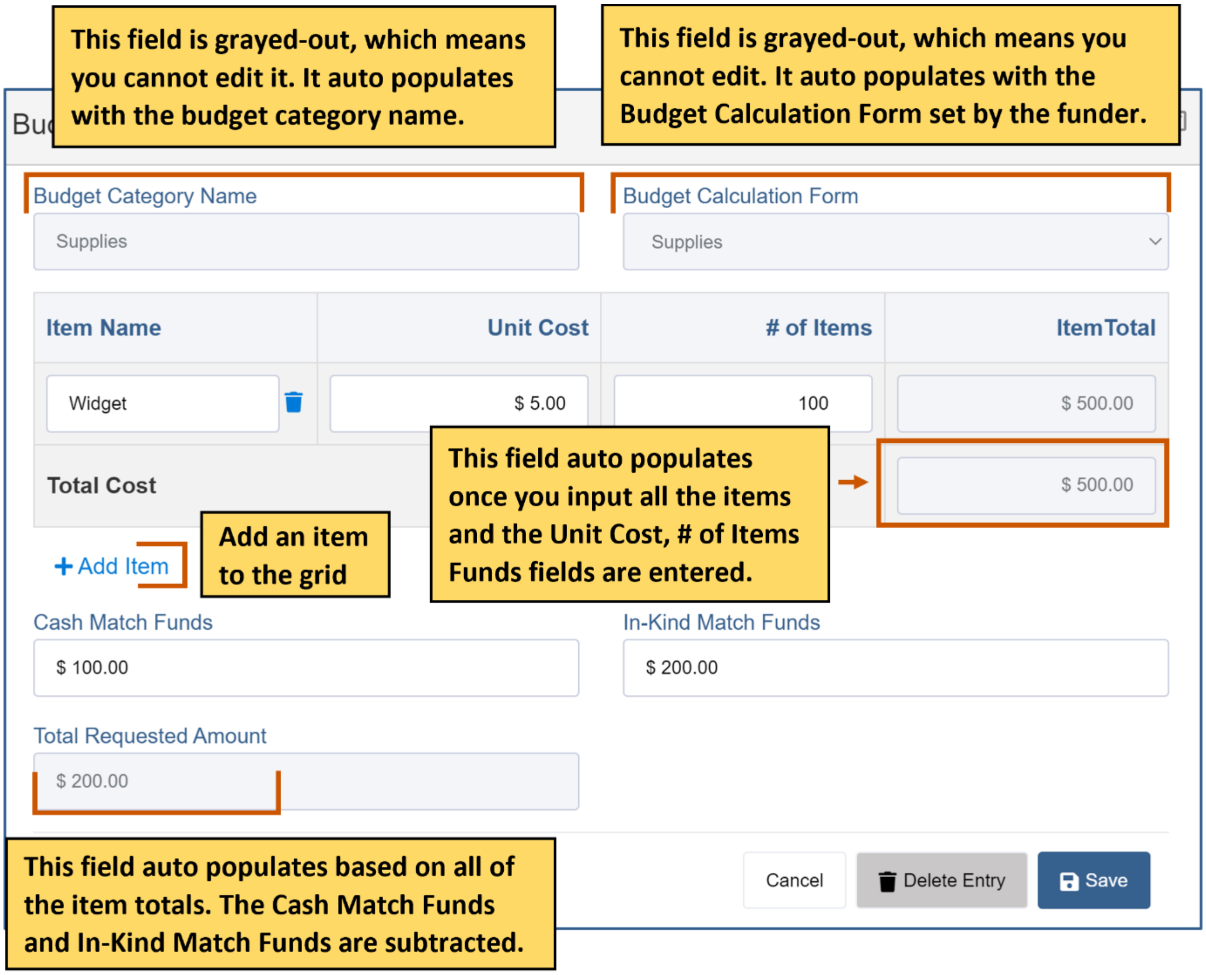


Figure 222: Supplies Template – Cash Match/In-Kind

Item Total = Unit Cost x # of Items x number of items inputted
Total Requested = (Unit Cost x # of Items x number of items inputted) – Cash Match Funds – In-Kind Match Funds

Add an Item

1. Click **Add Item.** The Item grid is now editable.

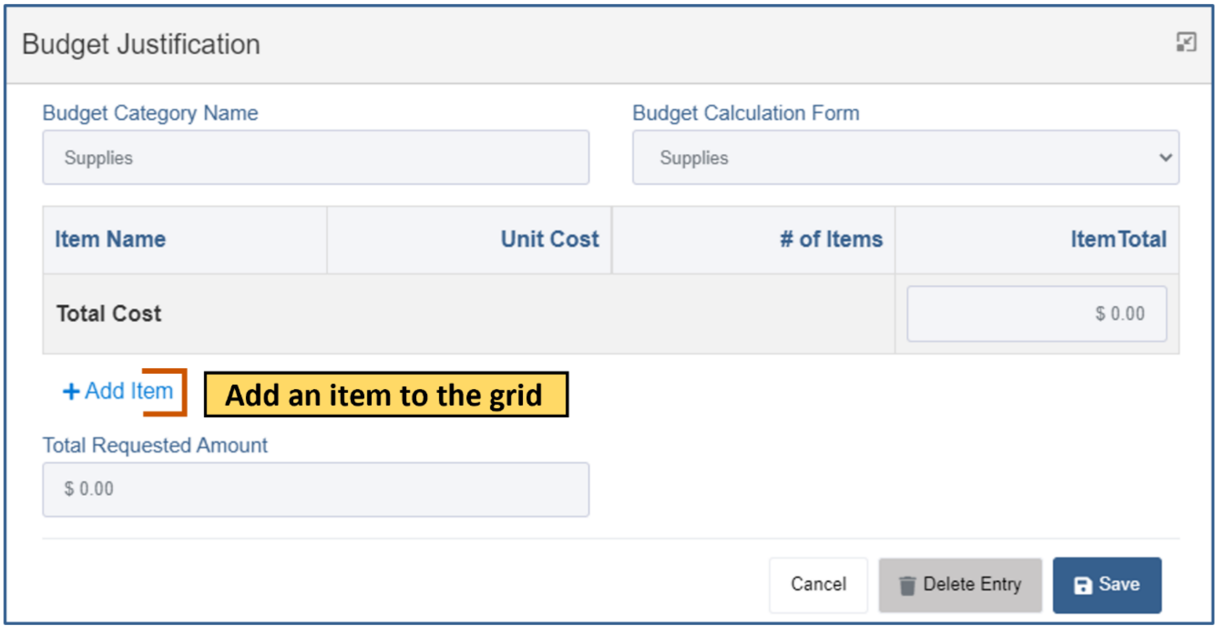


Figure 223: Add Item

2. Enter the data. Repeat steps 1 and 2 for each item you wish to add.
3. Click **Save.** The budget calculations appear in the grid.

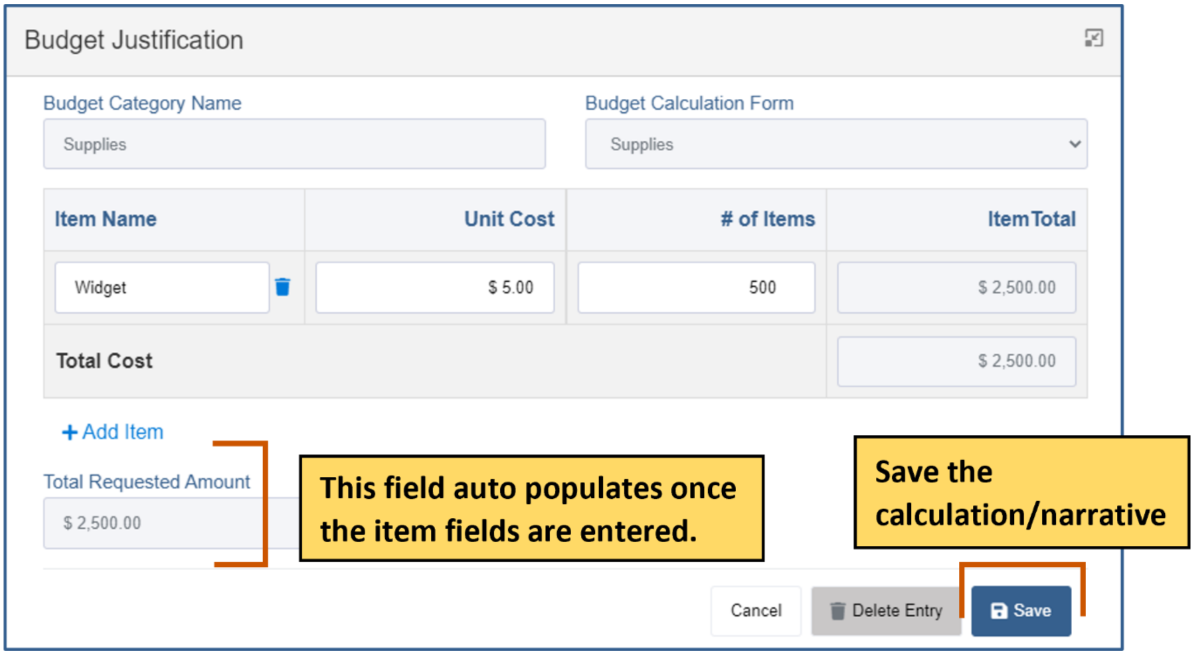


Figure 224: Save Supplies Calculation/Narrative

Supplies Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Item Name	The name of the Budget Calculation form you are filling out.
Unit Cost	Cost of the unit.
# of items	Type in the number of items.
Item Total	Total amount of a specific item.
Total Cost	Total amount of all the items.
Add Item	Add an item to the grid.
Total Requested Amount	Total requested amount is based on the unit cost, number of Items, and the number of items you inputted. The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 22: Supplies Template Form

Travel

Calculate travel expenses for each staff member.

No Cash Match/In-Kind:

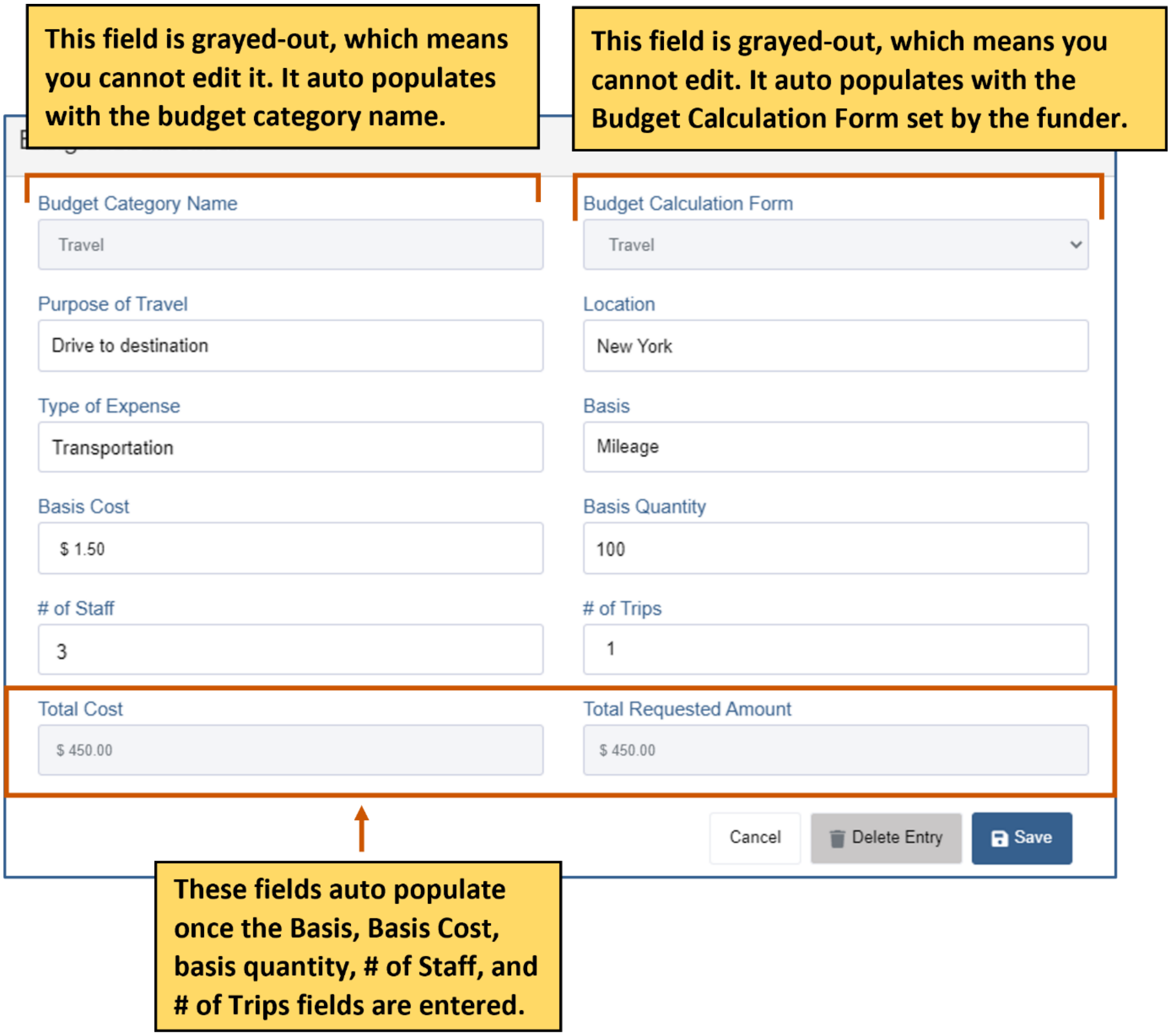


Figure 225: Travel Template – No Cash Match/In-Kind

Cash Match/In-Kind:

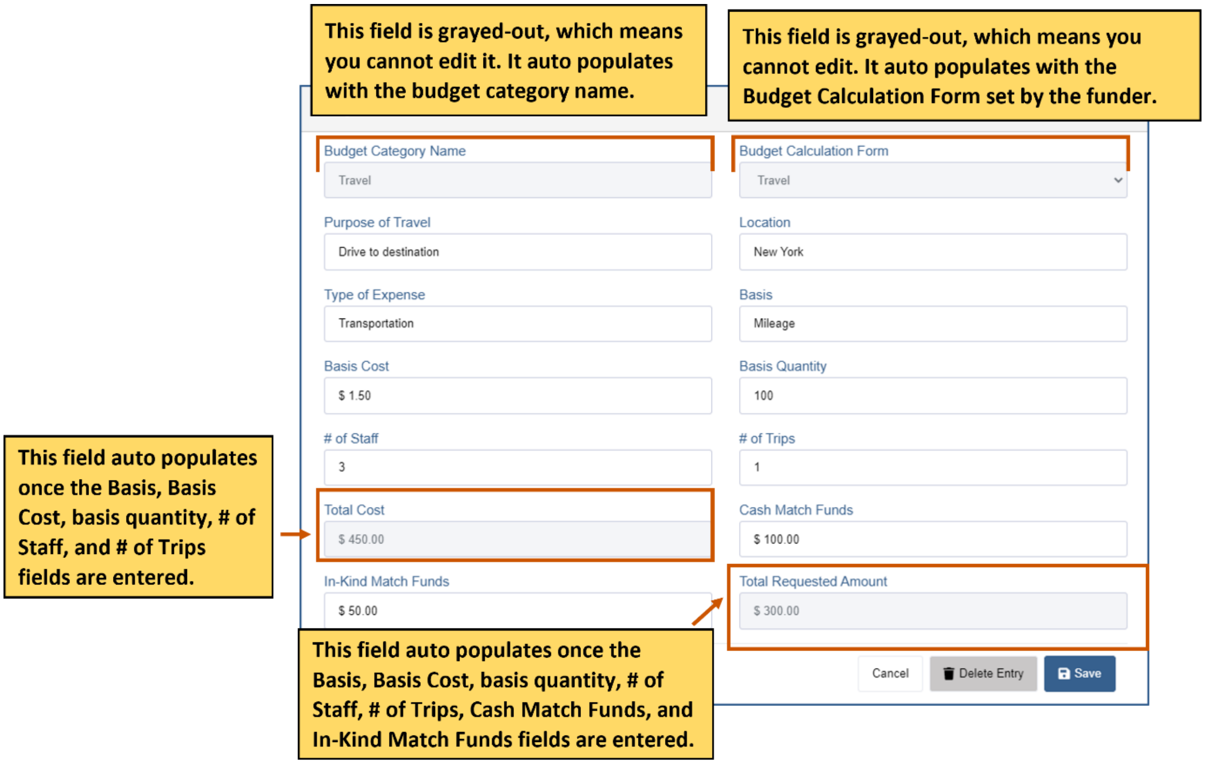


Figure 226: Travel Template – Cash Match/In-Kind

Total Cost = (Basis Cost x Basis Quantity x # of Staff x # of Trips)
Total Requested = (Basis Cost x Basis Quantity x # of Staff x # of Trips) – Cash Match Funds – In-Kind Match Funds

Travel Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Purpose of Travel	Type in the reason for travel.
Location	Type the location.
Type of Expense	Type in the type of expense. This is an alphanumeric field.
Basis	Alphanumeric field to explain what the expense is. For example, it can be mileage, such as how much per mile.

Table 23: Travel Template Form Part 1

Personnel Template Fields	Description
Basis Cost	Cost of the basis. This is a dollar amount. For example, a $1.50 per mile.
Basis Quantity	Type in the number of basis items. This is a numeri value. For example, 100 miles.
# of Staff	Type the number of people who are travelling.
# of Trips	Type in the number of trips the staff will take.
Total Cost	Total amount based on the salary and percentage of time. This is a dollar amount.
Total Requested Amount	Total requested amount based on the salary and percentage of time. This is a dollar amount.
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 24: Travel Template Form Part 2

Travel 2

Displays the number of people and cost per trip.

No Cash Match/In-Kind:

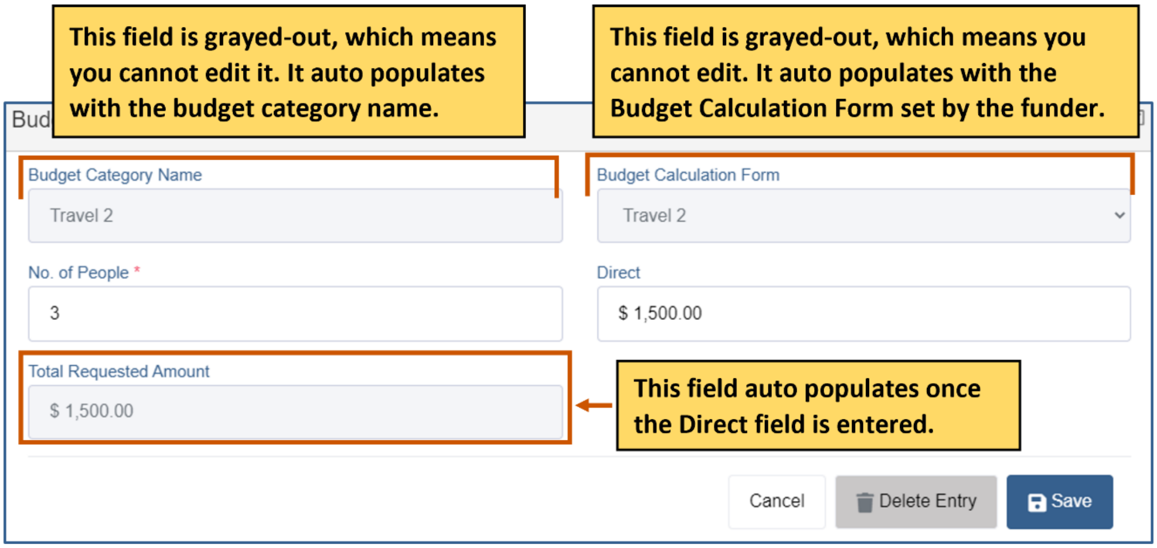


Figure 227: Travel 2 Template – No Cash Match/In-Kind

No Cash Match/In-Kind:

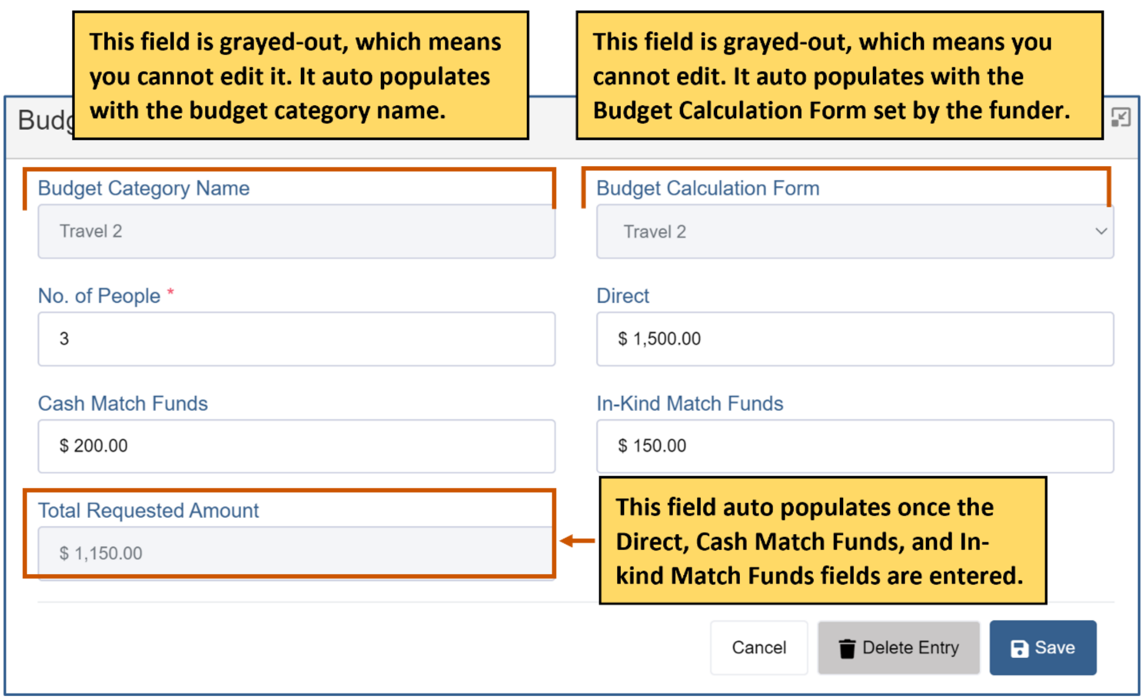


Figure 228: Travel 2 Template – Cash Match/In-Kind

Total Requested Amount = Direct – Cash Match Funds – In-Kind Match Funds

Travel Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
No. of People	Type in the number of people travelling or use the arrow selector.
Direct	Type the direct cost. This is a dollar amount.
Total Requested Amount	Total requested amount is based on the direct amount. The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 25: Travel 2 Template Form

Appendices

Figures

Tables