

# GrantVantage<sup>®</sup>

## **Step-by-Step Applicant Guide**

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# Applicant Steps

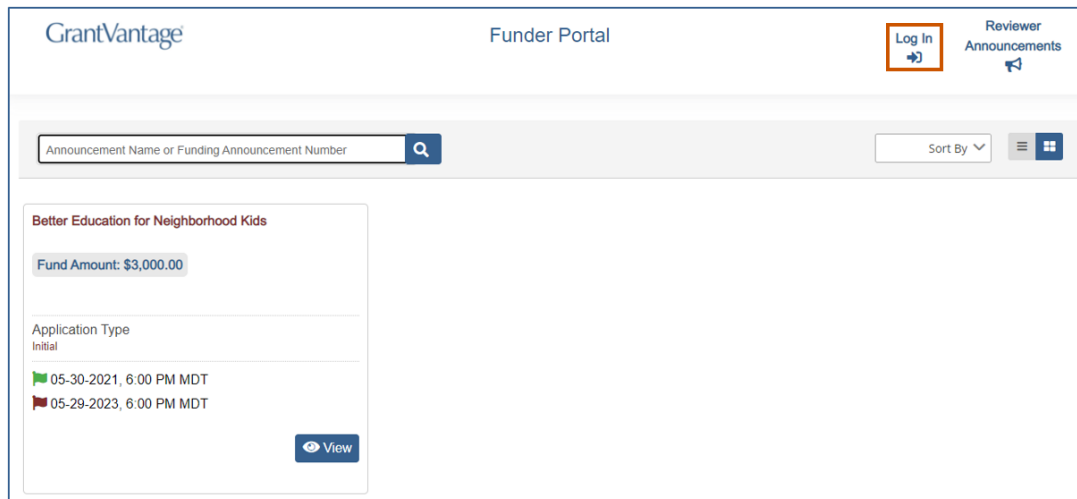
All applicants will follow a series of steps to create and submit their proposed project application. Every applicant must:

1. Register and/or Login
2. Complete the Applicant Organization Profile
3. Submit an application:
  - Answer applicant questions
  - Complete the Objective Template (if required)
  - Complete the Budget Template (if required)
  - Save & submit application
4. How to open and print application reports

This step-by-step guide will help applicants navigate GrantVantage, personalize their Applicant Organization profile, and submit their fully customized unique Project Application.

## Step 1: How to Login/Register an Applicant

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

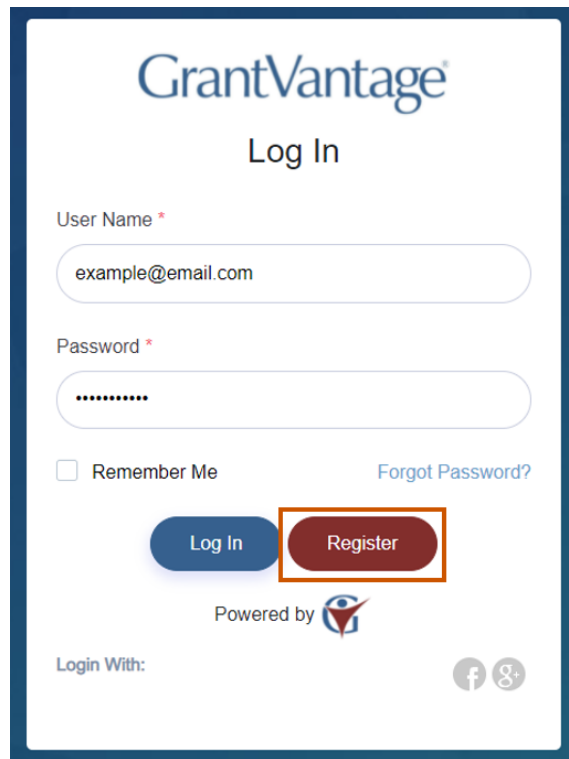


2. Enter login credentials and select **Log In**.

A screenshot of the GrantVantage Log In page. The header features the GrantVantage logo and the title 'Log In'. Below the title are two input fields: 'User Name \*' with the example 'example@email.com' and 'Password \*' with masked characters. Below the password field is a 'Remember Me' checkbox and a 'Forgot Password?' link. At the bottom of the form are two buttons: 'Log In' (highlighted with an orange box) and 'Register'. Below the buttons is a 'Powered by' logo. At the very bottom, there is a 'Login With:' section with Facebook and Google+ social media icons.

Or

**Optional:** Click **Register** and complete the Registration form.



The image shows a screenshot of the GrantVantage login and registration interface. The form is titled "GrantVantage® Log In". It contains two input fields: "User Name \*" with the example email "example@email.com" and "Password \*" with masked characters. Below these fields are a "Remember Me" checkbox and a "Forgot Password?" link. There are two buttons: a blue "Log In" button and a red "Register" button, which is highlighted with an orange border. At the bottom, it says "Powered by" with a logo, and "Login With:" with Facebook and Google+ icons.

GrantVantage®

Log In

User Name \*


example@email.com



Password \*

.....

☐ Remember Me [Forgot Password?](#)

[Log In](#) [Register](#)

Powered by 

Login With:  

## Homepage

On the homepage, you can view all published funding announcements and navigate to submitted applications or the applicant organization profile.

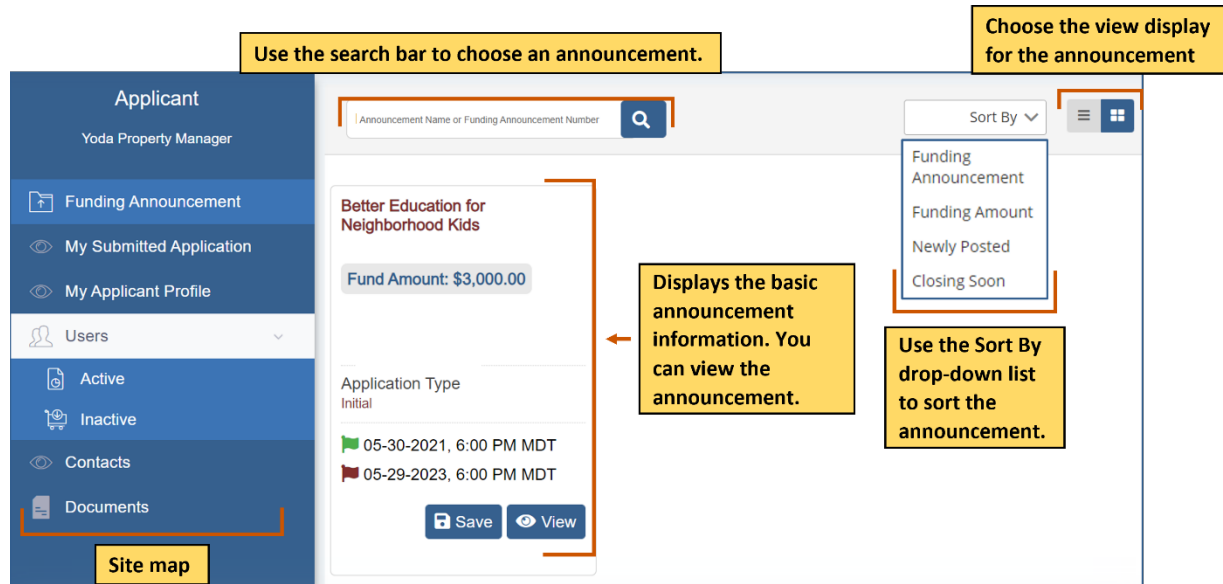


Figure 4: Homepage

## Step 2: Complete the Organization Profile

1. Complete the Applicant Profile. Select **My Applicant Profile** and add Organization Information, Physical & Mailing Addresses, Users, Contacts, and Documents.



**Remember to always save your work!**

Figure 5: Fill Out Applicant Profile



- Note:** As the Primary Applicant User, you may add a secondary Delegate User with separate login credentials to help you complete the application.

Name	Confidential Question Access	Email	Organization Unit	Active
Sun Shine	<input checked="" type="checkbox"/>	sshine@applicant.com	Yoda Property Manager	<input checked="" type="checkbox"/>
Donald Duck	<input checked="" type="checkbox"/>	dduck@applicant.com	Yoda Property Manager	<input checked="" type="checkbox"/>

## Step 3: How to Apply

1. On the Applicant Dashboard select  **View** to see the Funding Announcement.

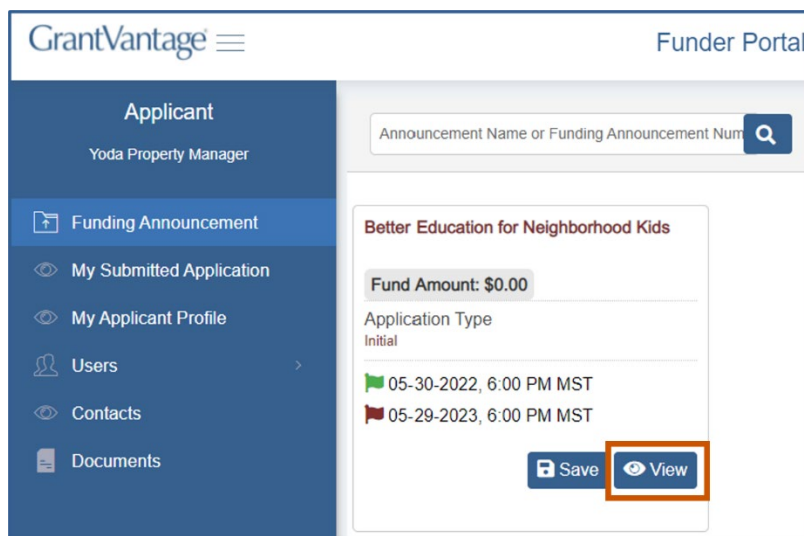


Figure 7: Funding Announcement – View

2. On the Funding Announcement page, select  **Apply**.

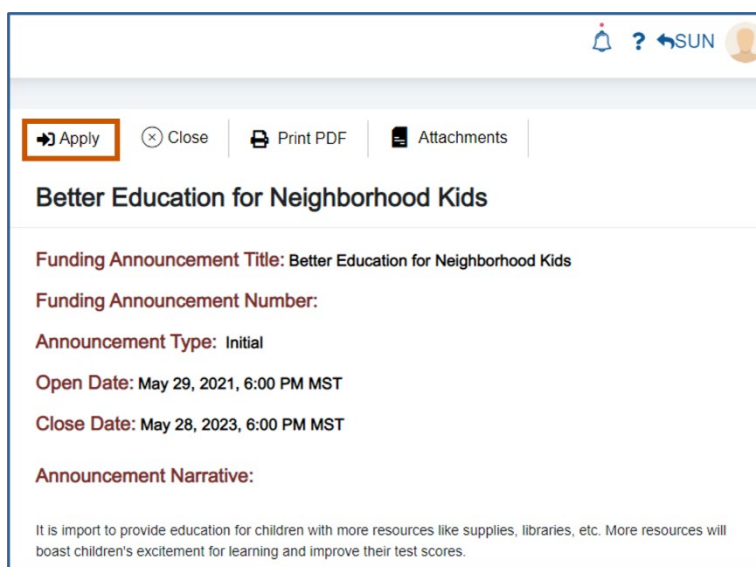



Figure 8: Apply to Announcement

3. Answer Questions

 **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.

a. Use the hamburger menu to see all the questions.

**Tip:** The questions are color-coded to indicate the completion process.

- **Blue** – The question is in progress.
- **Gray** – The question needs to be viewed.
- **Green** – The question is complete.

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

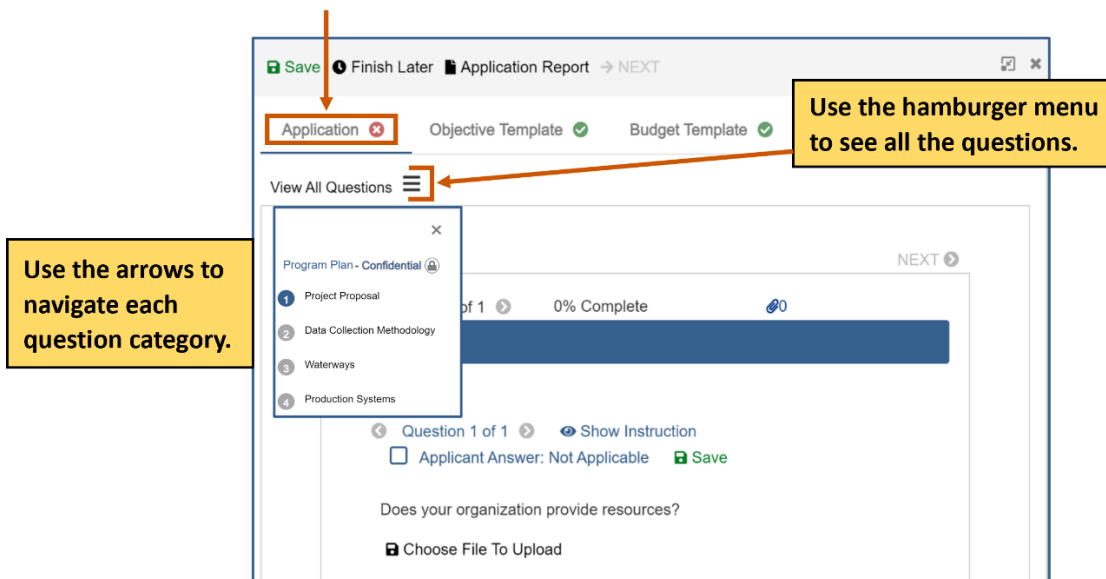


Figure 9: Use Hamburger Menu

b. Use the arrows to navigate the questions.

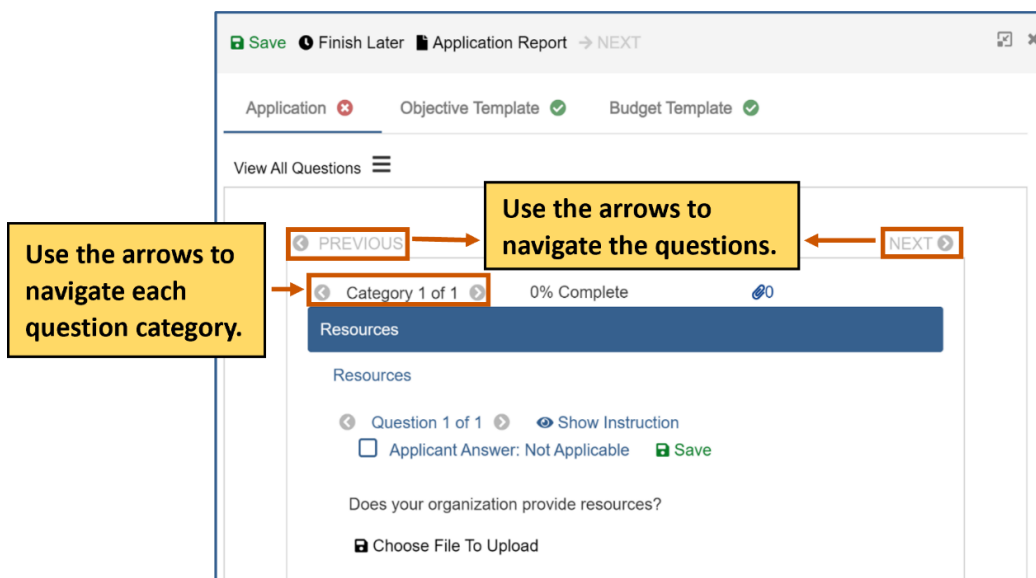


Figure 10: Use Arrows through Questions



Applicant questions must be 100% complete before application submission. You can also view documents attached to the application.

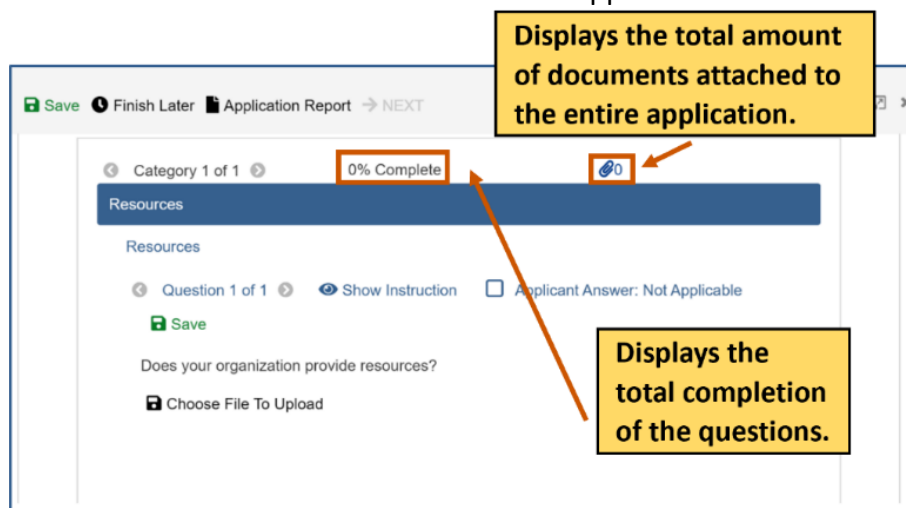


Figure 11: Question Completion

4. Complete the Objective Template.
    - a. Click the Objective Template tab to add goals, objectives, performance measures, and grant activities. If goals are required, each objective must be associated with a goal.
- Note:** The performance measures and grant activities must be associated with an objective.

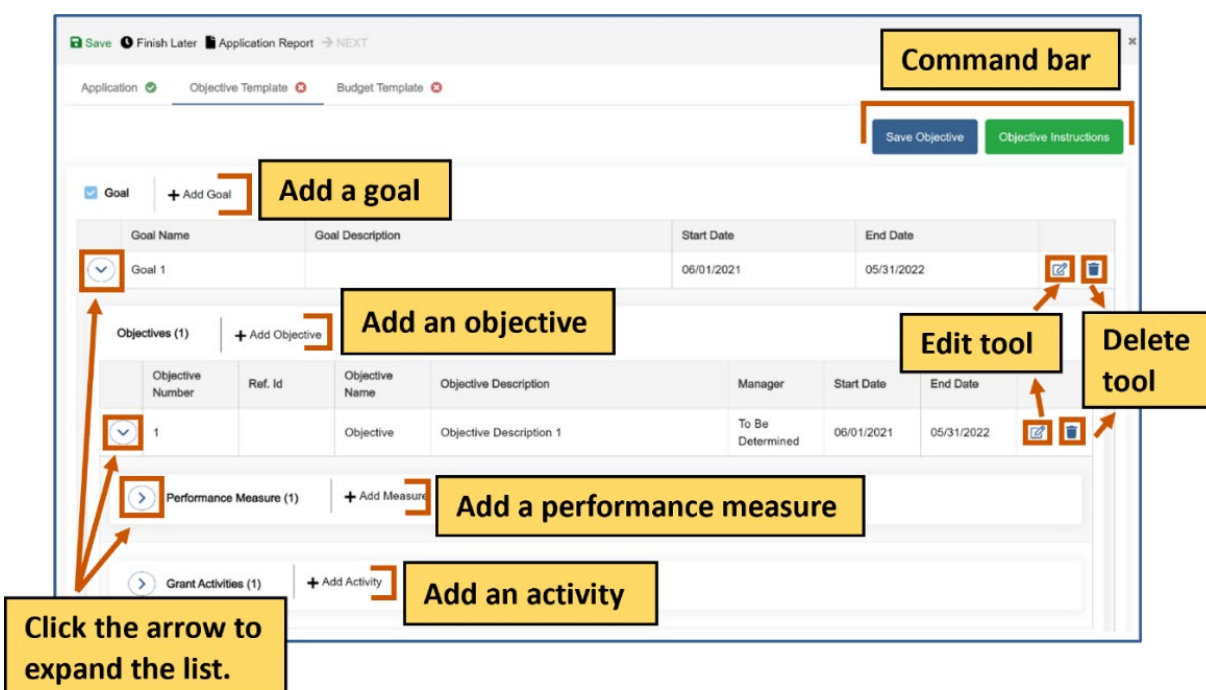


Figure 12: Objective Template

- b. Click **Save Objective**. The Objective Template is saved and locked. The objectives must be saved and locked before you can submit the application. Click **Return to Draft** to unlock the Objective Template again to make changes. You can go in and out of draft during the application process.

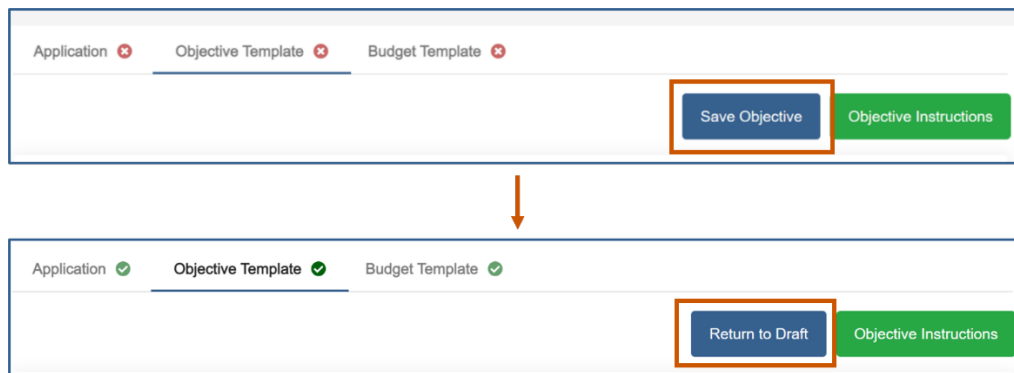


Figure 13: Save/Return Objective Template

5. Complete the Budget Template.
  - a. Applicants can enter a complete budget by selecting the Budget tab from the Application Navigation. Edit and customize your budget by using the Budget Edit Tools. The Budget Edit Tools allow applicants to fully customized each budget to their unique project. Add new parent and sub-categories by selecting the **+**, change a category's placement by using the arrows, modify budget category names with the edit tool, and delete by selecting the trashcan.

Year\* Year 1

Use the drop-down list to choose a budget year.

Save Budget Budget Instructions

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

Type in amount in cells that are white.

Budget tools

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

- b. Once your budget is complete, select **Save Budget** to save and lock the Budget template. The budget must be saved and locked before you can submit the application. Click **Return to Draft** to unlock the Budget Template again to make changes. You can go in and out of draft during the application process.

The screenshot shows two states of the application interface. In the top state, the 'Budget Template' tab is active and marked with a red 'x'. The 'Save Budget' button is highlighted with an orange box. An orange arrow points down to the bottom state, where the 'Budget Template' tab is now marked with a green checkmark. The 'Return to Draft' button is now highlighted with an orange box.

Figure 15: Save/Return Budget Template

- c. View the Budget Instructions for specific guidelines to prepare your budget for submission.

The screenshot shows the 'Budget Instructions' page. A yellow callout box on the right contains the text: 'View the Budget Instructions for specific guidelines to prepare your budget for submission.' The page includes a 'Year' dropdown set to 'Year 1', a 'Save Budget' button, and a 'Budget Instructions' button. Below is a table with budget categories and their values.

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

6. Applicant questions must be 100% complete and the Objective and Budget Templates are saved for the **→ Next** feature to unlock. This will be indicated by the green checkmarks next to each tab.

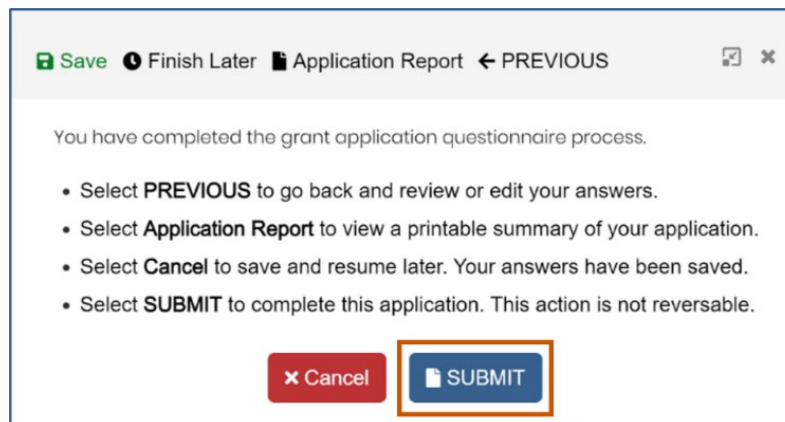
The screenshot shows the application progress bar at the top. It includes links for 'Save', 'Finish Later', 'Application Report', and a highlighted '→ NEXT' button. Below the progress bar, the 'Application', 'Objective Template', and 'Budget Template' tabs are all marked with green checkmarks. At the bottom right, there are 'Return to Draft' and 'Budget Instructions' buttons.

7. On the project details page, enter the Project Name, Requested Amount, Project Summary, and all required personnel. Once all details are entered, applicants may select **Finish**.




Figure 18: Go to Submission Page

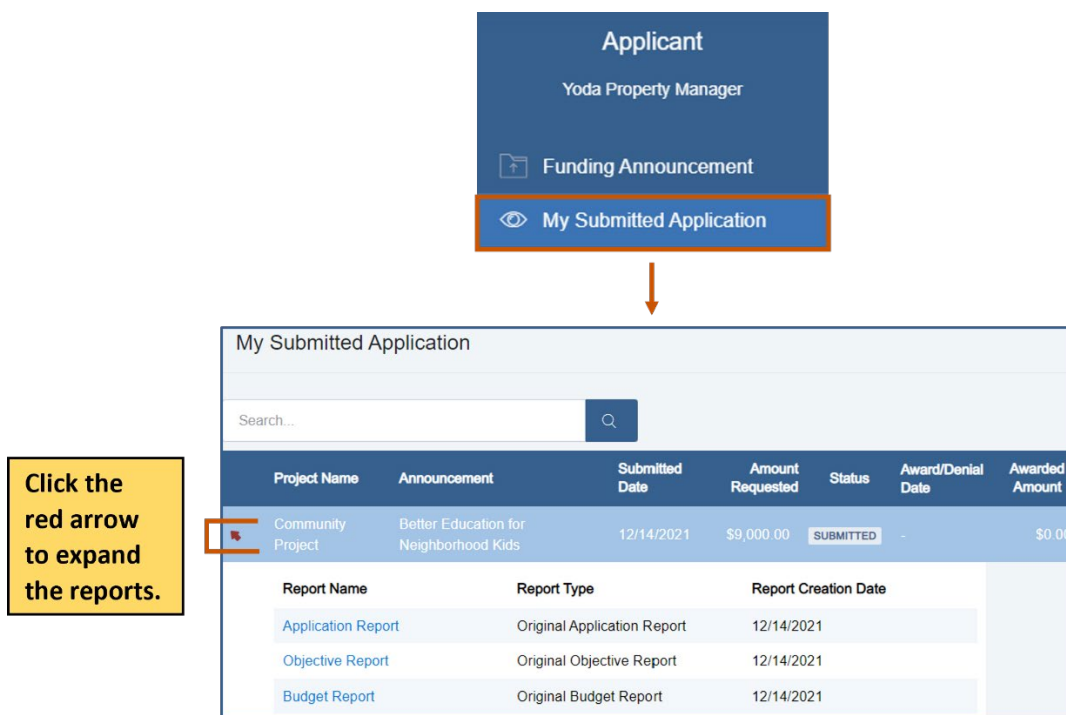
8. On the final page of the application ensure you have fully answered all questions and submitted all documents before selecting **Submit**.



## Step 4: Open and Print Report

At any point during or after the application process, Applicants may view a complete report of the questions and answers.

- From the site map, click  **My Submitted Application**. Single-click the blue arrow to display the Application, Objective, and Budget reports.



Applicant  
Yoda Property Manager

Funding Announcement

**My Submitted Application**

My Submitted Application

Search...

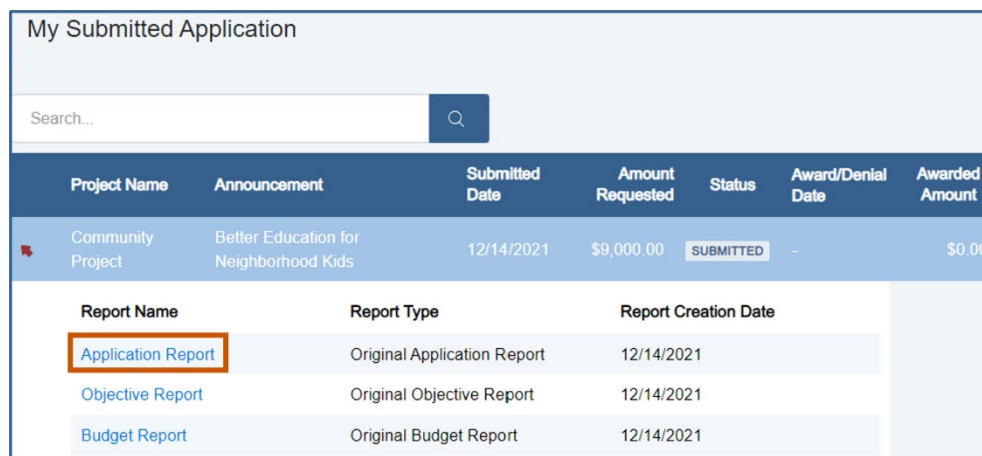
Project Name	Announcement	Submitted Date	Amount Requested	Status	Award/Denial Date	Awarded Amount
Community Project	Better Education for Neighborhood Kids	12/14/2021	\$9,000.00	SUBMITTED	-	\$0.00

Click the red arrow to expand the reports.

Report Name	Report Type	Report Creation Date
<a href="#">Application Report</a>	Original Application Report	12/14/2021
<a href="#">Objective Report</a>	Original Objective Report	12/14/2021
<a href="#">Budget Report</a>	Original Budget Report	12/14/2021

Figure 20: Access Reports

- Select **Application Report** to open.



My Submitted Application

Search...

Project Name	Announcement	Submitted Date	Amount Requested	Status	Award/Denial Date	Awarded Amount
Community Project	Better Education for Neighborhood Kids	12/14/2021	\$9,000.00	SUBMITTED	-	\$0.00

Report Name	Report Type	Report Creation Date
<a href="#">Application Report</a>	Original Application Report	12/14/2021
<a href="#">Objective Report</a>	Original Objective Report	12/14/2021
<a href="#">Budget Report</a>	Original Budget Report	12/14/2021

Figure 21: Select Application Report

3. Once the Report popup opens, users may view questions and answers or select **Print PDF** for a downloadable copy of their application.

**Review Report**

Print PDF Close Minimize

**Applicant information**

Applicant Organization: Yoda Property Manager  
Project Name: Community Project  
Funding Announcement: Better Education for Neighborhood Kids  
Requested Amount: \$656.88  
Project Summary: Help the community.

**Close the popup**

Total Application Score: 232/1384

Section Name: sec  
Sub Section Name: sub-sec  
Total Section Score: 232.00/1154

1. Applicant Question: picklist  
Applicant Response: r1  
QuestionScore: 12/30

ReviewerComments\_Scores:  
Individual: Hugh jack man 12/30  
Looks good.

2. Applicant Question: checklist  
Applicant Response:  
• c1  
• c2  
QuestionScore: 30/50

ReviewerComments\_Scores:  
Individual: Hugh jack man 30/50  
Looks good.

**Displays reviewer's name, comment, and score to the applicant questions.**

Figure 22: Review Report