

Step-by-Step Applicant Guide

This document provides Applicants with a step-by-step guide on how to apply to a Funding Announcement, submit applications, and add new applicant delegates to their team.

A. Login or Register

1. If you have an existing applicant account, then **Login**.



Figure 1: Funder Portal Homepage Header

2. If your organization does not have an account with the GrantVantage Funder Portal, then **Register** your applicant organization and create the Primary Applicant user.

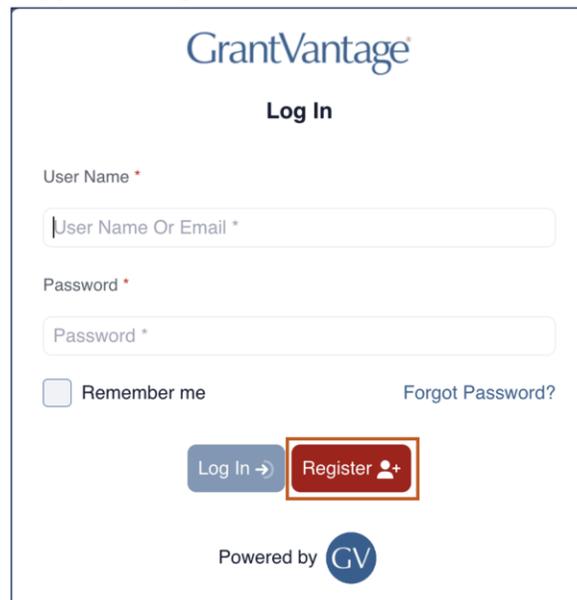


Figure 2: Login Screen

- a. **Note:** For more information about registering with the GrantVantage Funder Portal refer to the [Applicant Registration](#) Zendesk Article.

B. Complete the Organization Profile

1. Select **My Applicant Profile** from the navigation menu.
2. **Update** the Applicant Organization Profile by entering necessary information in each tab: Add Organization Information, Physical & Mailing Addresses, Users, Contacts, and Documents.
 - a. **Note:** For more information about updating the My Applicant Profile with the GrantVantage Funder Portal refer to the [My Applicant Profile](#) Zendesk Article.

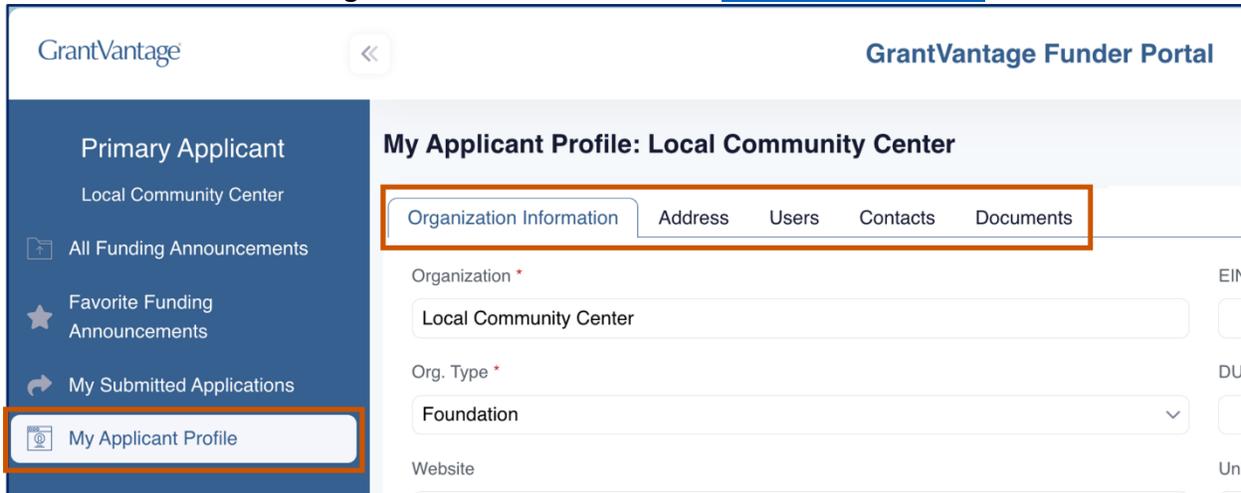


Figure 3: My Applicant Profile

3. **Optional:** Add Applicant Delegate Users
 - a. **Note:** Applicant Delegates are additional users who can login to the Applicant Organization and assist with completing applications.
 - b. Select the **Users** tab, then select **New**.



Figure 4: My Applicant Profile - Users

- c. Fill in the **required information** indicated with a red asterisk (*) and any other necessary information.
- d. Then, select **Save**.

C. Begin the Application

1. Select **All Funding Announcements** from the navigation menu.
 - a. To view the Funding Announcement narrative, select the **Announcement Name**.
 - b. To begin or resume an application, select **Apply**.

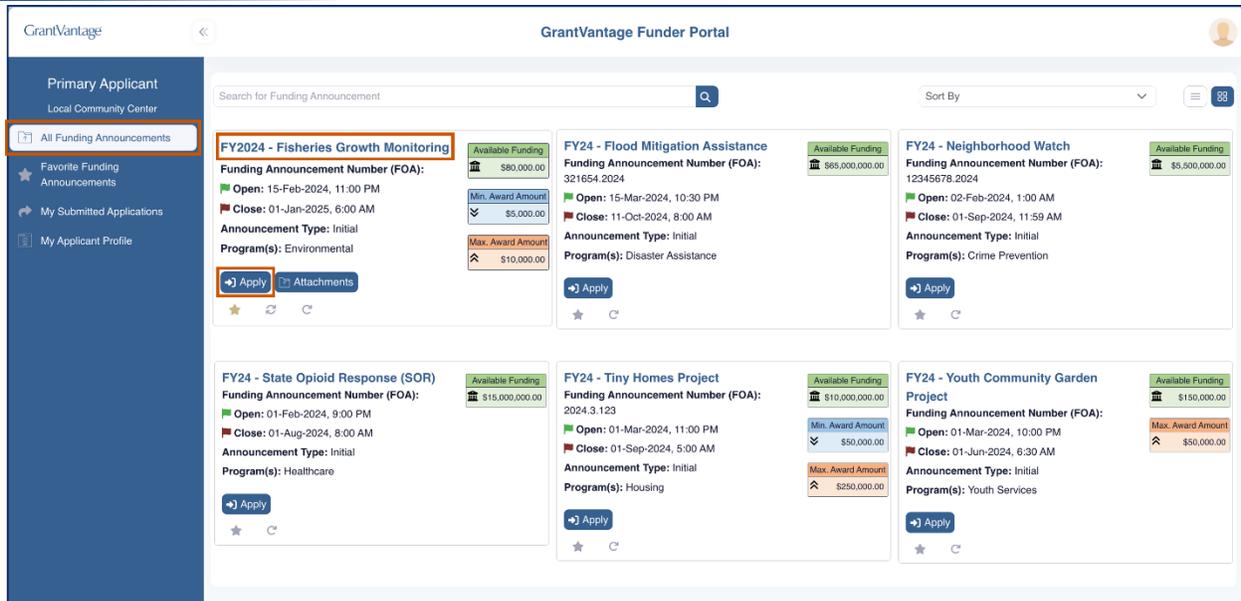


Figure 5: All Funding Announcements Gallery View

2. Select **Begin New Application**.

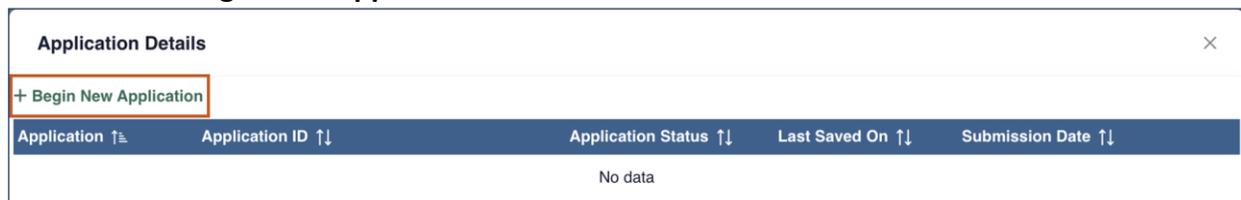


Figure 6: Application Details Dialog Box

3. Fill in the **Application Name**, then select **Save & Apply**.

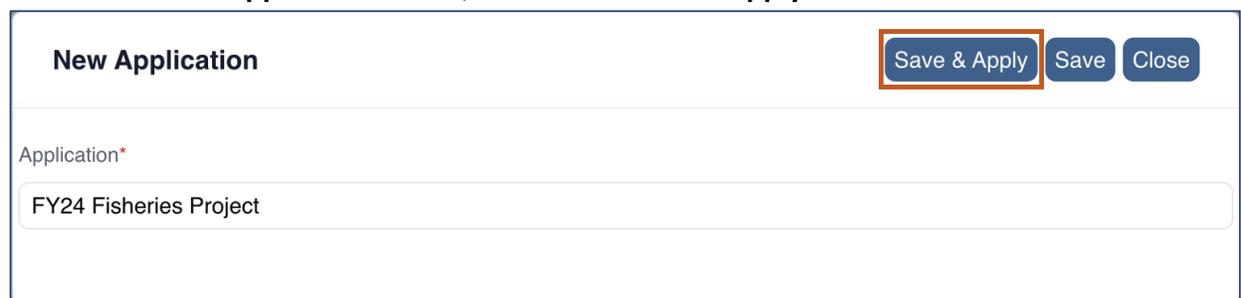


Figure 7: New Application Dialog Box

4. **Complete** all available application tabs.

- a. **Note:** Application requirements are configured for each Funding Announcement. All applications will have the Summary and Questions tab. Additionally, some applications may also include the Project Plan tab and/or the Budget tab. All areas of the Application must be completed before the application can be submitted.

D. Complete the Application

In Completing the Application, always refer to the Funder Organization for more information about application requirements. Once each tab—Summary, Questions, Project Plan, or Budget—is completed, the status icon will display a green checkmark.

i. Summary

The Summary section includes the name of the application, the requested amount, and the project summary. If the application does *not* include the Budget tab, applicants will enter their requested amount on this page. Otherwise, this field will auto-populate with the Budget Direct Total.

1. Fill in the **required information** indicated with a red asterisk (*) and any other necessary information.
2. Select **Save**.

FY24 Fisheries Project Submit Save Save & Close Application Report

Summary Questions Project Plan Budget Help

Previous Questions Progress Application Attachments 0 Total Requested Amount: \$0.00 Next

Save

Application *
FY24 Fisheries Project

Requested Amount *
\$0.00

Project Summary *
The FY24 Fisheries Project represents a collaborative and holistic approach to ensuring the sustainability and resilience of fisheries. Through targeted interventions in management, habitat restoration, community engagement, research, and climate adaptation, the project aims to secure the future of marine resources and the livelihoods dependent on them.

Authorized Certifying Official: John Stream
Project Director/Manager: John Stream
Project Manager/Coordinator: Sarah Lake
Compliance/Fiscal Officer: Sarah Lake

Figure 8: Summary Tab

ii. Questions

The Questions section includes all applicant questions required to submit an application. Once all Questions are answered, the Question tab icon will display a green checkmark and Question Progress will be 100%.

For more information about how to answer each Question Types during application to a funding announcement, refer to the [How to Answer each Question Types](#) Zendesk Article.

1. **Answer** all Questions.
 - a. Navigate questions by selecting **Next**, **Previous**, or a specific **Question Name**.
 - b. Select **Question Instruction** to view any additional question instructions.
 - c. **Note:** Select **Save** every time you answer a question.

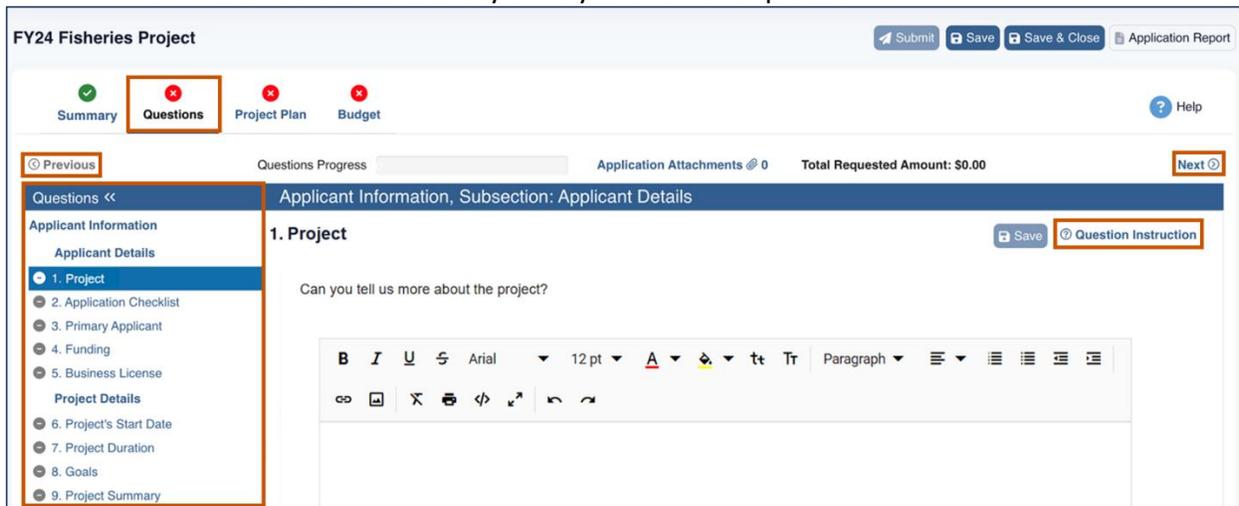


Figure 9: Funding Announcement Question Tab

2. **Optional:** Question Attachments
 - a. **Note:** Some questions may require attachments or allow supplemental attachments. Documents may be uploaded ahead of time to the Organization Documents, these must be associated directly with a question to be part of the application.
 - b. Select **Attach Document**.



Figure 10: Attach Documents

- c. If the document is not available, select **Browse**. Then, select the document from your files.



Figure 11: Documents Dialog Box – Browse

d. Select **Upload**.

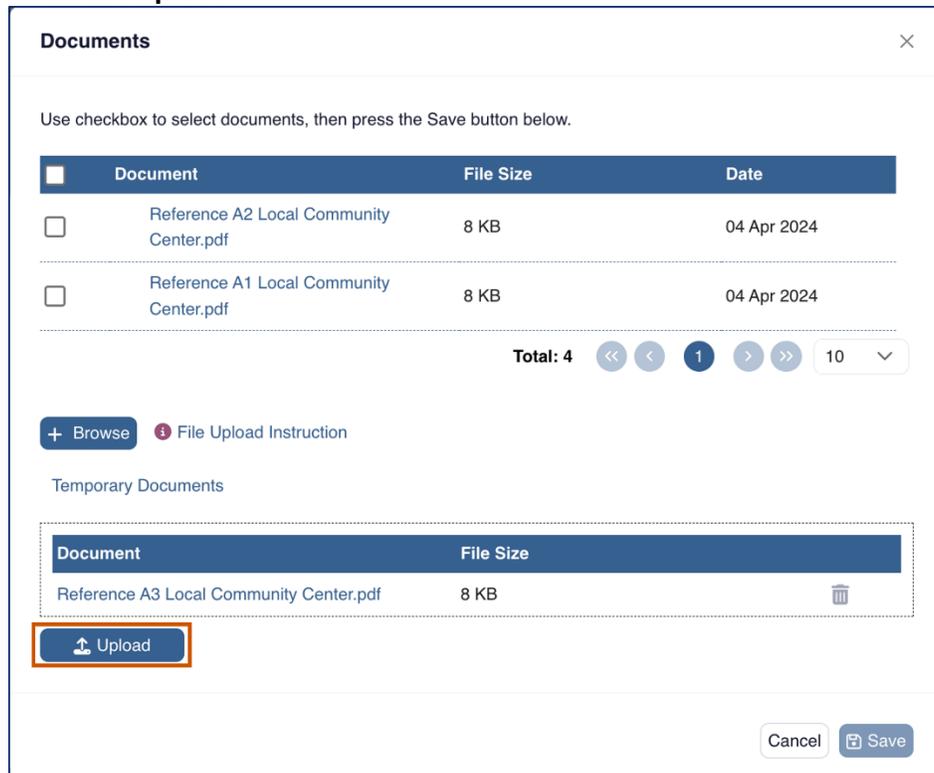


Figure 12: Documents Dialog Box - Upload

e. Select the **Document** checkbox.

f. Select **Save**. The document will appear in the question answer area.

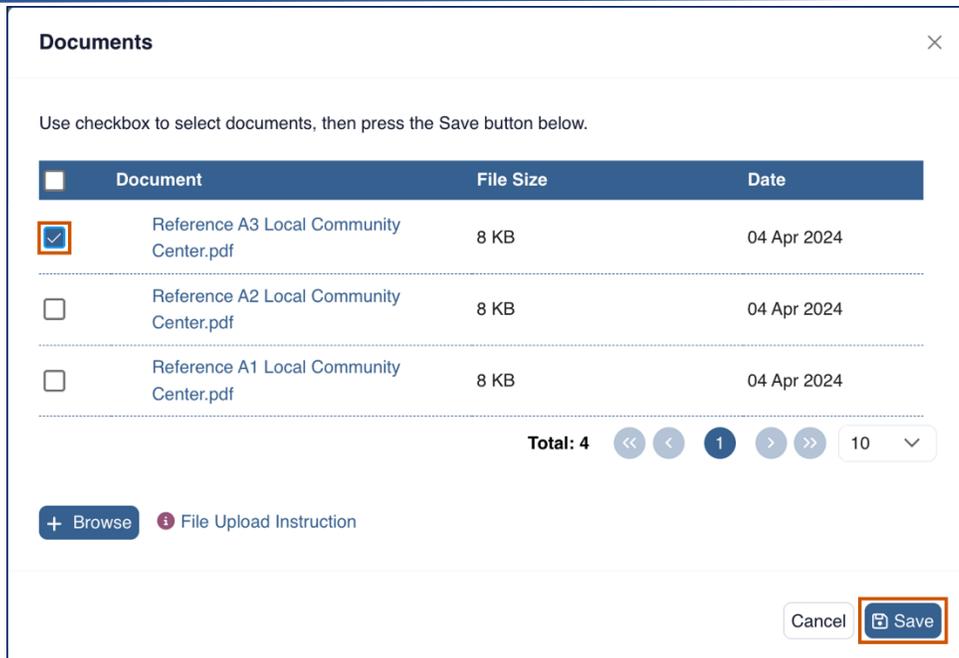


Figure 13: Documents Dialog Box - Save

iii. Project Plan

The Project Plan may or may not be configured based on the Funding Announcement. If the Project Plan is configured, it is a required component of the application. Once the Project Plan is complete, the Project Plan tab icon will display a green checkmark.

For more information about how to complete the Project Plan during application to a funding announcement, refer to the [How to Complete a Project Plan](#) Zendesk Article.

1. Select the **Project Plan** tab.
2. Select **Project Plan Instructions**.

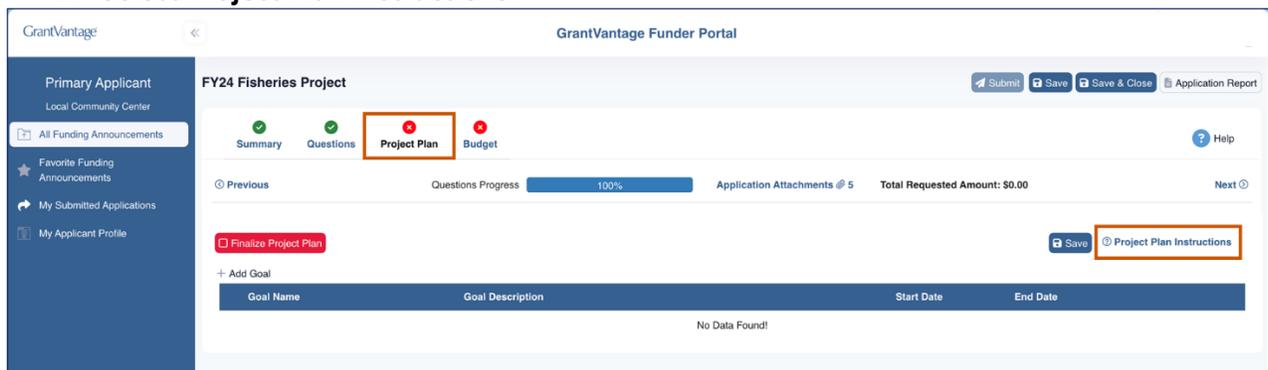


Figure 14: Project Plan Instructions

3. **Optional:** Add Goals, Objectives, Performance Measures, and Activities
 - a. **Note:** Applicants may or may not be allowed to add new Goals, Objectives, Performance Measures, or Activities.

- b. Select **Add Goal** to add a new Goal.
 - i. **Note:** Goals may or may not be configured based on the Funding Announcement.
- c. Select **Add Objective** to add a new Objective.
- d. Select **Add Measure** to add a new Measure.
- e. Select **Add Activity** to add a new Activity.

FY24 Fisheries Project [Submit] [Save] [Save & Close] [Application Report]

Summary [✓] Questions [✓] **Project Plan** [✗] Budget [✗] [Help]

Previous Questions Progress 100% Application Attachments 5 Total Requested Amount: \$0.00 Next

[Finalize Project Plan] [Save] [Project Plan Instructions]

[+ Add Goal]

Goal Name	Goal Description	Start Date	End Date
Enhance the sustainability and productivity of fisheries resources in the region	The goal of the Fisheries Growth Monitoring program is to improve the long-term sustainability and productivity of fisheries resources in the region by assessing the status of fish stocks, implementing sustainable fishing practices, promoting conservation and habitat restoration initiatives, enhancing scientific research and data collection capabilities, and strengthening collaboration and partnerships with stakeholders. Through these efforts, the program aims to contribute to the preservation of marine ecosystems, the protection of vulnerable fish species, and the support of livelihoods dependent on fisheries resources.	02/01/2024	11/01/2024

Objective (1) [+ Add Objective]

Obj. #	Ref. ID	Objective Name	Objective Description	Manager	Start Date	End Date
1	1	Assess the status of fish stocks and fisheries resources	Conduct comprehensive surveys and data collection efforts to assess fish population sizes, distribution patterns, and health indicators.		02/01/2024	11/01/2024

> Performance Measure (1) [+ Add Measure]

> Activity (1) [+ Add Activity]

Ref. ID	Activity Description	Manager	Start Date	Due Date
1	Deploy fishing vessels equipped with scientific gear, conduct underwater surveys using remote sensing technology, analyze catch data and biological samples collected.		02/01/2024	11/01/2024

Figure 15: Add Goals, Objectives, Performance Measures, and Activities

- 4. **Optional:** Edit Goals, Objectives, Performance Measures, and Activities
 - a. **Note:** Applicants may or may not be allowed to edit Goals, Objectives, Performance Measures, or Activities. This may result in locked fields within the dialog boxes.
 - b. Select the **Edit** button to modify Goals, Objectives, Performance Measures, and Activities. Once your changes are made, select **Save**.



FY24 Fisheries Project Submit Save Save & Close Application Report

Summary Questions **Project Plan** Budget Help

Previous Questions Progress **100%** Application Attachments 5 Total Requested Amount: \$0.00 Next

Finalize Project Plan Save Project Plan Instructions

+ Add Goal

Goal Name	Goal Description	Start Date	End Date
Enhance the sustainability and productivity of fisheries resources in the region	The goal of the Fisheries Growth Monitoring program is to improve the long-term sustainability and productivity of fisheries resources in the region by assessing the status of fish stocks, implementing sustainable fishing practices, promoting conservation and habitat restoration initiatives, enhancing scientific research and data collection capabilities, and strengthening collaboration and partnerships with stakeholders. Through these efforts, the program aims to contribute to the preservation of marine ecosystems, the protection of vulnerable fish species, and the support of livelihoods dependent on fisheries resources.	02/01/2024	11/01/2024

Objective (1) + Add Objective

Obj. #	Ref. ID	Objective Name	Objective Description	Manager	Start Date	End Date
1	1	Assess the status of fish stocks and fisheries resources	Conduct comprehensive surveys and data collection efforts to assess fish population sizes, distribution patterns, and health indicators.		02/01/2024	11/01/2024

Performance Measure (1) + Add Measure

Ref. ID	Measure Description	Manager	Type	Planned	Actual	Start Date	End Date
1	Number of fish species surveyed, changes in fish population sizes over time, distribution maps created.		Number	100	50	02/01/2024	11/01/2024

Activity (1) + Add Activity

Ref. ID	Activity Description	Manager	Start Date	Due Date
1	Deploy fishing vessels equipped with scientific gear, conduct underwater surveys using remote sensing technology, analyze catch data and biological samples collected.		02/01/2024	11/01/2024

Figure 16: Edit Goals, Objectives, Performance Measures, and Activities

5. Select **Finalize Project Plan**.

- a. **Note:** This will save and lock the Project Plan. Once Finalize has been selected, the Project Plan tab icon will display a green checkmark.

FY24 Fisheries Project Submit Save Save & Close Application Report

Summary Questions **Project Plan** Budget Help

Previous Questions Progress **100%** Application Attachments 5 Total Requested Amount: \$0.00 Next

Finalize Project Plan Save Project Plan Instructions

+ Add Goal

Goal Name	Goal Description	Start Date	End Date
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Figure 17: Finalize Project Plan

6. **Optional:** Unlock the Project Plan for editing

- a. Select **Return to Draft**. Once all changes are made, select **Finalize Project Plan**.

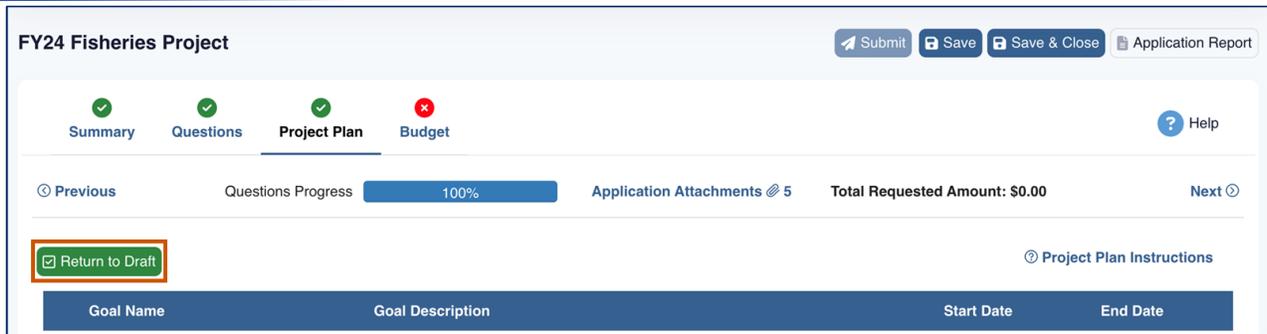


Figure 18: Return to Draft

iv. Budget

The Budget may or may not be configured based on the Funding Announcement. If the Budget is configured, it is a required component of the application. Once the Budget is complete, the Budget tab icon will display a green checkmark. Budgets may require applicants to complete Budget Calculations or Budget Narratives.

For more information about how to complete a Budget during application to a funding announcement, refer to the [How to Complete a Budget](#) Zendesk Article.

1. Select the **Budget** tab.
2. Select **Budget Instructions**.

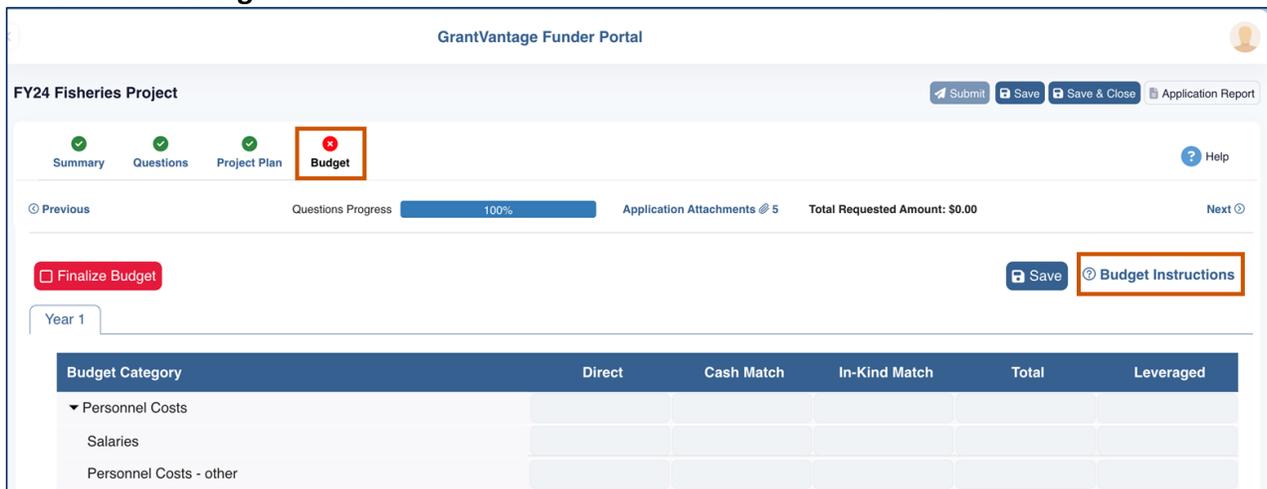


Figure 19: Budget Instructions

3. Fill in the **Direct**, **Cash Match**, **In-Kind**, and **Leveraged** columns as needed.
 - a. **Note:** Some Budget Categories may require the completion of the Budget Calculation form and disallow entering a value on the budget.
 - b. Select the **Calculator** button next to the budget category name. **Complete** the Budget Calculation form, then select **Save** on the dialog box.
 - i. **Note:** If a Budget Category Narrative is required, the field will be visible on the Budget Calculation form.



Budget Category	Direct	Cash Match	In-Kind Match	Total	Leveraged
Salaries					
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Figure 20: Budget – Disallowed Entries

c. Enter the budget values, then select **Save**.

FY24 Fisheries Project

Submit Save Save & Close Application Report

Summary Questions Project Plan **Budget** Help

Previous Questions Progress 100% Application Attachments 0 Total Requested Amount: \$30,000.00 Next

Finalize Budget Save Budget Instructions

Year 1

Budget Category	Direct	Cash Match	In-Kind Match	Total	Leveraged
Salaries	\$20,000.00	\$5,000.00	\$5,000.00	\$30,000.00	\$2,500.00
Supplies & Equipment	\$10,000.00	\$4,000.00	\$2,500.00	\$16,500.00	\$1,000.00
Total	\$30,000.00	\$9,000.00	\$7,500.00	\$46,500.00	\$3,500.00

Figure 21: Budget – Allowed Entries

4. **Optional: Parent & Sub-Categories**

a. **Note:** Applicants may or may not be allowed to create, edit, and delete Parent Category & Sub-Categories.

b. **Add Parent & Sub-Categories**

- i. Hover over the **Budget Category**, then select the **Plus** button.
- ii. Select **New Parent Category** to add a new parent budget category. Select **New Sub-Category** to add a new sub-category to a parent budget category.

GrantVantage Funder Portal

FY24 Fisheries Project

Submit Save Save & Close Application Report

Summary Questions Project Plan **Budget** Help

Previous Questions Progress 100% Application Attachments 5 Total Requested Amount: \$0.00 Next

Finalize Budget Save Budget Instructions

Year 1

Budget Category	Direct	Cash Match	In-Kind Match	Total	Leveraged
Personnel Costs					
Total		\$0.00	\$0.00	\$0.00	\$0.00

New Parent Category
New Sub-Category

Figure 22: Parent Category and Sub-Categories

iii. Fill in the **Parent Budget Category Name**.



iv. Select **Save** next to the Budget Category name.

GrantVantage Funder Portal

FY24 Fisheries Project

Submit Save Save & Close Application Report

Summary Questions Project Plan **Budget** Help

Previous Questions Progress 100% Application Attachments 5 Total Requested Amount: \$0.00 Next

Finalize Budget Save Budget Instructions

Year 1

Budget Category	Direct	Cash Match	In-Kind Match	Total	Leveraged
Personnel Costs					
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Figure 23: New Parent Category

- v. Fill in the **Sub-Budget Category Name**.
- vi. Select **Save** next to the Budget Category name.

GrantVantage Funder Portal

FY24 Fisheries Project

Submit Save Save & Close Application Report

Summary Questions Project Plan **Budget** Help

Previous Questions Progress 100% Application Attachments 5 Total Requested Amount: \$0.00 Next

Finalize Budget Save Budget Instructions

Year 1

Budget Category	Direct	Cash Match	In-Kind Match	Total	Leveraged
Personnel Costs					
Salaries					
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Figure 24: New Sub-Category

5. **Optional:** Budget Narrative

- a. **Note:** The Budget Narrative is configured based on the Funding Announcement. Narratives are entered into as a single budget narrative or by Budget Category.
- b. Single Budget Narrative: Enter the Narrative in the **Budget Narrative** textbox. Then, select **Save**.

Budget Category	Direct	Total
Construction	\$750.00	\$750.00
Consultant Travel (if necessary)	\$500.00	\$500.00
Equipment	\$1,600.00	\$1,600.00
Equipment (pro rated)	\$150.00	\$150.00
Fringe Benefits	\$250.00	\$250.00
Total	\$3,250.00	\$3,250.00

Budget Justification

Budget Narrative

The budget narrative includes funds for construction to support building and infrastructure development, travel expenses for essential consultants, and the purchase of necessary tools and machinery. Additionally, it allocates a pro-rated portion of shared equipment costs and covers fringe benefits such as health insurance and retirement contributions for employees.

Figure 25: Budget Narrative

6. Select **Finalize Budget**.

- a. **Note:** This will save and lock the Budget. Once Finalize has been selected the Budget tab status will display a green checkmark.

FY24 Fisheries Project

Submit Save Save & Close Application Report

Summary Questions Project Plan **Budget** Help

Previous Questions Progress 100% Application Attachments 0 Total Requested Amount: \$30,000.00 Next

Finalize Budget Save Budget Instructions

Year 1

Budget Category	Direct	Total
-----------------	--------	-------

Figure 26: Finalize Budget

7. **Optional:** Unlock the Budget for editing

- a. Select **Return to Draft**. Once all changes are made, select **Finalize Budget**.



FY24 Fisheries Project [Submit] [Save] [Save & Close] [Application Report]

Summary [✓] Questions [✓] Project Plan [✓] Budget [✓] [Help]

Previous Questions Progress 100% Application Attachments 0 Total Requested Amount: \$30,000.00 Next

[Return to Draft] [Budget Instructions]

Year 1

Budget Category	Direct	Total
-----------------	--------	-------

Figure 27: Return Budget to Draft

E. Submit the Application

Applications can only be submitted once all tabs are complete and have a green checkmark.

1. Select Submit.

GrantVantage GrantVantage Funder Portal

Primary Applicant: Local Community Center

FY24 Fisheries Project [Submit] [Save] [Save & Close] [Application Report]

Summary [✓] Questions [✓] Project Plan [✓] Budget [✓] [Help]

Previous Questions Progress 100% Application Attachments 5 Total Requested Amount: \$30,000.00 Next

All Funding Announcements

Favorite Funding Announcements

My Submitted Applications

Figure 28: Submit Application

- a. **Note:** Once an application has been submitted it will be available in My Submitted Applications. Select the **Application Report** button to view the PDF application.

GrantVantage GrantVantage Funder Portal

Primary Applicant: Green Energy Applicants 1

My Submitted Applications

Search...

Application ↑	Announcement ↓	Submitted ↓	Amount Requested ↑	Status ↑	Award/ Decline ↓	Awarded Amount ↓
FY2024 - Fisheries Growth Monitoring Initiative	FY2024 - Fisheries Growth Monitoring (Grace)	17 Oct 2024	\$90,000.00	Submitted		\$0.00 [Application Report]
> FY2024 Green Energy Fund: Funding Secured	FY2024 - Green Energy Fund Secured	16 Sept 2024	\$50,000,000.00	Negotiation		\$0.00 [Application Report]

Total: 2 [1] 10

Figure 29: Application Report