

The Grant Scoop



Hello GrantVantage Users!

Hope everyone had a happy holidays and a grantastic new year! We at GrantVantage are excited to announce a couple of new features:

- Changes to Transactions
- SAM Registration
- Drawdowns, Reimbursements, & Disbursements
- A New Way to Communicate
- Budget Revision Response
- Source Allocation by Budget Category

Changes to Transactions

Due to a need for a more structured workflow, GrantVantage has removed the ability to add transactions to revision draft budgets. Now transactions are added against the Initial Draft & Approved Budget. The Transaction Detail Report should only display current budgets when Status = Initial Draft *or* Status = Approved Budget.

Expand All	Sources	IDC Rate	Threshold	Direct	Cash Match	In-Kind Match
	Personnel			\$210,000.00	\$26,000.00	\$19,000.00
	Equipment			\$10,000.00		
	Supplies			\$50,000.00	\$10,000.00	
	Fixed Charges					\$9,000.00
	travel					
	Indirect Cost					
	Total			\$0.00	\$0.00	\$0.00
	Difference					

ORGANIZATION : GV INFORMATION
Alameda County

Organization Info

Organization Name*	Alameda County	Parent Organization	..
Organization Type	B. County Government	Main Phone	..
Specify Other Type	..	Description	..
DUNS	..	EIN	..
Agency ID	..	SAM Registration Expiration Date	..

SAM Registration

To better assist you we have implemented a way to track your [SAM Registration](#), including a New Date field on the Organization Form called: "SAM Registration Expiration Date".

And we will be adding a yes/no option for the "Active Exclusion".

Drawdowns, Reimbursements, & Disbursements

The "Cash Match Amount" & "In-Kind Match Amount" will now auto-populate the sum of all Cash Match & In-Kind transactions that exist between the "Period Start" and "Period End" dates of a reimbursement request for a particular funder when source allocation is enabled.

The screenshot shows the 'Drawdown/Reimbursement' form with the following details:

- Payment Requested Date: 12/1/2017
- Program Fund: IFund Science & Technology Fund
- Currency: USD
- Status: Requested
- Period Start: 12/1/2017
- Funder: Schlemlein Goetz Fick & Scruggs
- Invoice Number: Invoice 's test
- Amount: \$66.00
- Period End: 12/31/2017
- Funder Contact: [Empty]
- Purchase/Voucher Number: PO - 502
- Unbilled Amount: \$0.00
- Memo: [Empty]
- Cash Match Amount: \$0.00
- In-Kind-Match Amount: \$0.00

A New Way to Communicate

We are pleased to announce our redesigned communication message! Now you will receive the message not only on your GrantVantage account but a copy will be sent to your email in real time! The communication feature is designed to assist GrantVantage users with user-directed workflows! Remember, you must login to your GrantVantage account in order to respond to any inquiries, requests, or to accept/decline requests.

The email notification contains the following information:

To... [Empty]
Cc... [Empty]
Subject: New Message in GrantVantage: (17-19) 1001 Grant

You MUST log into GrantVantage to respond to this email. Direct replies will not be accepted as a valid response to this notification.

To respond to this message:

1. Use your browser (Google Chrome or Microsoft Edge) to log into GrantVantage
2. Open project **(17-19) 1001 NCC Training Grant**
3. Select "Communication" from the Project Management Menu (Blue Ribbon Bar)
4. Double-Click to open new messages
5. Enter Response
6. Select "Send"

Date: 11/26/2018 13:33:21
From: Sequoyah Stamps
To: Josie Beherma
Related To: Communication
Subject: Hey

Budget Revision Response

The "Budget Revision Response" field and the "Approve" & "Decline" options have been created! You may now create and review budget changes, and explain within the form what the budget change is for or why the budget change is being approved/declined.

The screenshot shows the 'Budget Revision Justification - Pending' form with the following details:

- Budget Revision Justification: Saving Budget
- Budget Revision Response: [Empty text area]
- Buttons: Approve, Decline

Source Allocation by Budget Category

You may now manage multiple project budgets in a single budget! To do so make sure you have selected the Source Allocation by Budget Category when creating the initial budget. This will give you the option to pre-allocate funds to different revenue sources.

To pre-allocate funds select the fund you wish to pre-allocate, for example the Travel Fund. In the popup menu you may choose where you want the funds to pre-allocate and what amount.

Then in the Reports section you may utilize the Revenue Source to distinguish information based on the selected funder record. This gives you the ability to see all budgets as a single budget or as multiple mini budgets depending on revenue source selection.

Budget Properties

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

Round IDC: **No Rounding**

Source Allocation By Transaction
 Source Allocation By Budget Category
 Specify Objective Allocations
 Require Budget Revision Justification

Expand All	IDC Rate	Threshold	Direct	Cash Match	In-Kind Match	Total
Sources						
Fund: ZVAX Adults			\$210,000.00	\$11,000.00	\$11,000.00	\$232,000.00
Fund: ZVAX Children			\$25,000.00			\$25,000.00
Fund: HHS ZVAX - Supp (66.110)			\$75,000.00			\$75,000.00
Grantee: WeHelp Atlanta			\$110,000.00			\$110,000.00
Grantee Match: WeHelp Atlanta: Fund: ZVAX Adults				\$11,000.00	\$11,000.00	\$22,000.00
Grantee Match: WeHelp Atlanta: Fund: ZVAX Children						
Grantee Match: WeHelp Atlanta: Fund: HHS ZVAX - Su				\$11,000.00	\$11,000.00	\$22,000.00
Personnel			\$30,000.00	\$11,000.00		\$41,000.00
Equipment			\$70,000.00		\$11,000.00	\$81,000.00
Travel			\$110,000.00			\$110,000.00
Indirect Cost <input checked="" type="checkbox"/>						
Total			\$210,000.00	\$11,000.00	\$11,000.00	\$232,000.00

Source Allocation

Budget Category: travel Budget Amount: \$110,000.00

Source Type: Direct

Budget Category Allocations	Budgeted	Balance	Amount
Source/Program Category: Fund: ZVAX Children	\$75,000.00	\$0.00	\$10,000.00
Source/Program Category: Fund: HHS ZVAX - Supp (66.110)	\$110,000.00	\$0.00	\$100,000.00

+ Add Allocation Remaining Balance: \$0.00

Reports Report Management

Select Report: Transaction Report Project: Grant: ZVAX Atlanta -Copy Project Year(s): Year 1 (10/1/2017 - 9/30/2018) Report Start: 10/01/2017 Report End: 09/30/2018

Revenue Source(s): 6 Selected

- Select All
- Fund: ZVAX Adults
- Fund: ZVAX Children
- Fund: HHS ZVAX - Supp (66.110)
- Grantee Match: ZVAX Adults
- Grantee Match: ZVAX Children
- Grantee Match: HHS ZVAX - Supp (66.110)

Transaction Status	Direct	Cash Match	In-Kind Match	Total	Leveraged
Actual	\$210,000.00			\$210,000.00	
	\$30,000.00	\$11,000.00		\$41,000.00	
	\$70,000.00		\$11,000.00	\$81,000.00	
	\$110,000.00			\$110,000.00	
Total Budgeted	\$210,000.00	\$11,000.00	\$11,000.00	\$232,000.00	\$0.00

Reports Report Management

Select Report: Transaction Report Project: Grant: ZVAX Atlanta -Copy Project Year(s): Year 1 (10/1/2017 - 9/30/2018) Report Start: 10/01/2017 Report End: 09/30/2018

Revenue Source(s): 2 Selected

- Select All
- Fund: ZVAX Adults
- Fund: ZVAX Children
- Fund: HHS ZVAX - Supp (66.110)
- Grantee Match: ZVAX Adults
- Grantee Match: ZVAX Children
- Grantee Match: HHS ZVAX - Supp (66.110)

Transaction Status	Direct	Cash Match	In-Kind Match	Total
Actual		\$11,000.00		\$11,000.00
			\$11,000.00	\$11,000.00
	\$0.00	\$11,000.00	\$11,000.00	\$22,000.00

Thank you for using GrantVantage Solutions!
 If you have any questions, comments, or concerns feel free to reach out to us!