

Grant Module

User Manual-Club

This training manual will provide you with information on the Grant Module in DACdb (District and Club database) so that Club users have documentation of what needs to be done for the various processes in this module.

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1 Summary

The DACdb grant module is designed to manage the entire life cycle of the "District Grant" process. This process starts when the District is notified of the District Designated Funds (DDF) funding for the upcoming OrgYear by RI. This Total DDF funding amount is entered into the Grant Module (for that OrgYear). Districts can request up to 50% of their District Designated Fund (DDF) in one annual block grant which is used for funding District Grant project submitted by the clubs. The net Amount (DDF Funding - Global Grants – Admin Costs) is then managed by the District -- and is what this new module is all about supporting.

Each club seeking to fund a project, creates a project page, enters the project description, contact information, financing (including requested DDF funding), photos, supporting documents, etc.

Once the project documentation is finalized at the club-level, it can be digitally signed and approved by the designated club officers. A minimum of two (2) officers must be defined for signature approval, and they are typically the Club President and Club Foundation Chair that has taken the designated training on District Grants. By signing a project, the club officers are specifying that they agree to the Terms and Conditions for District Grants. BTW, a custom document can be defined by each District and used as part of the submission process.

The district leadership team (DG, DGE, TRF, District Approval Committee, District Grants Audit Committee, etc.) is granted access to the projects in your district so that they can review and approve them. A list of signed projects ready to be approved is displayed in the "Manage Grants" section. Projects in other states of development are also displayed,

At any time you can generate lists of projects at various statuses in your district, and see how much DDF is allocated to these projects, with individual totals per club. A "spending plan" list can be generated and can be used to apply for the Block District Grant for your district at The Rotary Foundation. After approval, the Grant Module keeps track of which project was paid by your treasurer for District Grants. For "Paid" projects, a link to a blank report form is displayed on the administration page so that the users can prepare their Final Report. This document (Word format) can be customized for your own District.

2 Overview of Club Grant Processes

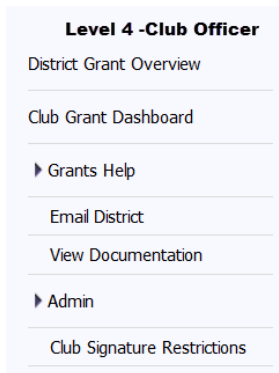
This section provides a visual overview of the activities required for Club Grants.

Instructions shown assume you are signed on to DACdb.

Once you click on the Grant tab you will see the following list of activities on the left side of the screen based on security along with the District Grants Overview screen on the right side.

Since this activity may involve various security levels, for documentation purposes the instructions shown below are based on a Level 4 – Club Officer

The following summarizes what activities are done along with a sample of each screen.



- 1) District Grant Overview - Default Screen when you click on the Grants tab
- 2) Club Grant Dashboard – List of all club projects in various statuses where various actions can be done along with activities related to the following action buttons:
 - a. To Excel button-Ability to select projects on the list and create an excel doc with summary info
 - b. PMail button – Ability to select projects on the list and send a PMail
 - c. Change OrgYear button – Ability to change the organization year for a list of projects in another year
 - d. New Grant Request button – Ability to add a new grant request for DDF funds for the organization year you are in.
- 3) Grants Help
 - a. Email District – Ability to send an email to District Administrators
 - b. View Documentation – Documentation on the Grant Module. There is one user manual for the Club and one user manual for the District.
- 4) Admin
 - a. Club Signature Restrictions – Ability to indicate what users have permission to sign Grant projects at the Club level

NOTE: Samples screens based on above numbers are shown below

Club Grant Signature Restrictions 4



Define and configure who can electronically sign-off and approve a District Grant at the Club below. The members list on the right are the ones granded the authority to sign-off and approve a club's District Grant for submission to the District. Before a District Grant can be approved and submitted to the Distict, it must be electronically signed by the minimum number of members defined below for club-level approval.

[Save](#)

Club Signatures Configuration

Number of Club Signatures Required:

To *Grant* access, move members from the left to the right. To *Remove* access, move members from the right to the left. Click the [Save] button (above-right) to save your changes.

Club User List	Club Signature Permission
A1xxxxss, A1xxBBB xxyy (Level: 2)	Robinson, Smokey (Level: 9)
AAA, AAA (Level: 3)	Landmann, Mark R Test (Level: 7)
Aaa11, Aaatester B Mr (Level: 5)	Aaa10, Aaatester B Mr (Level: 7)
Aaa12, Aaatester B Mr (Level: 1)	Aaa1, Aaatester B Mr (Level: 4)
Aaa2, Aaatester B Mr (Level: 4)	
Aaa3, Aaatester B Mr (Level: 3)	
Aaa4, Aaatester B Mr (Level: 1)	
Aaa5, Aaatester B Mr (Level: 1)	
Aaa6, Aaatester B Mr (Level: 1)	
Aaa7, Aaatester B Mr (Level: 4)	
Aaa8, Aaatester B Mr (Level: 1)	
Aaa9, Aaatester B Mr (Level: 1)	
Aaaaa, Aaaaa (Level: 1)	
AAAABBBB, AAAABBBB AAAABBBB (Level: 1)	
Aaatestedelete, Aaatestedelete (Level: 1)	
Aalders, Hendrik H. (Level: 1)	
Act1_Prod, Act1_Prod (Level: 1)	

3 District Grant Overview

When you click on the Grants tab, the District Grant Overview screen will appear that provides you with an overview of District Grants along with a list of what projects have been approved by the District. You can also click on the District Grant Overview section at any time to return from another grant activity as shown below.

Since this activity may involve various security levels, for documentation purposes the instructions shown below are based on a Level 4 – Club Officer.

- District Grant Overview
- Club Grant Dashboard
- Grants Help
- Email District
- View Documentation
- Admin
- Club Signature Restrictions

District Grants Overview

1



District Grants:

District grants offer clubs and districts flexibility in carrying out activities supporting the Foundation Mission. Districts are encouraged to distribute these grant funds for relatively short-term activities, either local or international.

District grants fund smaller, short-term activities that address needs in both your local community and communities worldwide. Each district gets to choose which activities it will fund with these grants.

Districts can request up to 50 percent of their District Designated Fund (DDF) in one annual block grant. Districts are responsible for administering the activities undertaken with these funds. They may disperse these grant funds at their discretion for district- or club-sponsored activities. In addition:

- All activities funded with district grant funds must adhere to the eligibility requirements set forth in the terms and conditions for Rotary Foundation grants.
- Districts must be qualified by the Foundation to receive district grant funds.



Current Projects: 2012-13

The following projects have been funded and approved in District 9969:

2

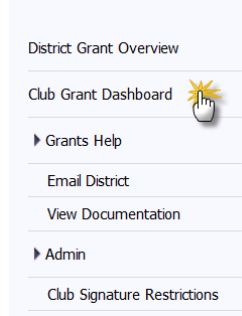
Project	Club	Status	Total Project Budget
Hals New Grant	Flank Steak - Test, Bank Masters - Test	Approved	\$5,000.00

- 1) Print icon – allows a user to print this screen
- 2) Club column – indicates that club or clubs sharing this project

4 Club Grant Dashboard

This area allows you to manage all Club project Grants. Most of your activities will occur here if you are completing club activities. To get to this screen anywhere within the Grant module, just click on the Club Grant Dashboard list as shown below.

Since this activity may involve various security levels, for documentation purposes the instructions shown below are based on a Level 4 – Club Officer.



Club Bank Masters - Test Grant Dashboard [2012-13]

A summary is shown below of all grants submitted to the District in this Club.

Club Grant	Action	Project Name	Club	Status	Total Project Budget	Requested DDF
<input type="checkbox"/>		SCTest	Bank Masters - Test	Draft	\$ 3.00	\$ 1.00
<input type="checkbox"/>		Test1	Bank Masters - Test	Draft	\$ 2.00	\$ 1.00
<input type="checkbox"/>		TestMultiContcts	Bank Masters - Test, Butter Ball - Test	Draft	\$ 3,333.00	\$ 22.00
<input type="checkbox"/>		Save The Trees	Bank Masters - Test, Butter Ball - Test	Accepting Signatures	\$ 5,000.00	\$ 2,500.00
<input type="checkbox"/>		TestAA	Bank Masters - Test	Accepting Signatures	\$ 436.00	\$ 34.00
<input type="checkbox"/>		Hals New Grant	Bank Masters - Test, Flank Steak - Test	Approved	\$ 5,000.00	\$ 2,500.00
<input type="checkbox"/>		Save The Eagles Email Test	Bank Masters - Test	Completed	\$ 10.00	\$ 1.00
<input type="checkbox"/>		TestSA501	Bank Masters - Test	Completed	\$ 1,500.00	\$ 600.00

1) These two icons allow you to:

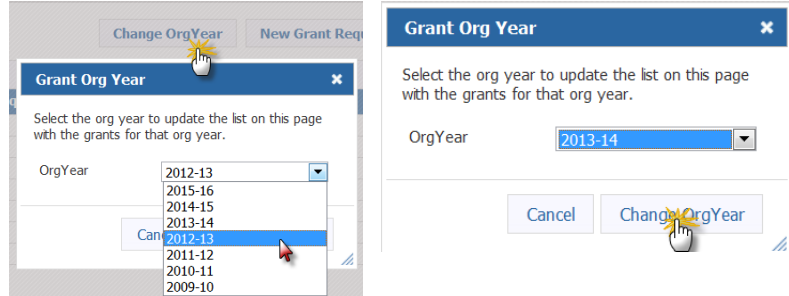
- 1st is the Maximize Window icon that allows you to click on this icon to minimize the window to view more of the screen by removing the view of the list on the left side of the screen. You may return the screen to show the list by just clicking on this icon again
- 2nd Customize icon currently only allows you to change the OrgYear. However, may have other features in the future



2) To Excel button-when you select projects from the list and click this button, you will create an excel document that has summary information (See Create Excel Document (To Excel Button) section for further details on this process)

3) PMail button-when you select projects from the list and click this button, you may create a PMail to be sent to individuals concerning these projects (See Create a PMail (PMail Button) section for further details on this process)

- 4) If you need to Change OrgYear:
 - a) Click on Change OrgYear button
 - b) Select Year you want to view
 - c) Click on the Change Org Year button



- 5) If you need to add a new Grant, click on New Grant Request button (see Grant Details section for further details for the New Grant Request process)
- 6) Total Project Budget – from the Details tab of the Grant request
- 7) Requested DDF – from the Details tab of the Grant request
- 8) Action – what appears is based on your security and status of the project:
 - a) Draft Status projects – the action icons are:
 - i) View icon – upon clicking it takes you to Grant View screen (see Grant View section for further details on viewing the Grant View process)
 - ii) Edit icon – upon clicking it takes you to the Edit Grant screen (See Edit Grant section for further details on editing a project via the Edit Grant process)
 - iii) Delete icon – upon clicking it takes you to Are Your Sure? window where you need to click the Confirm Delete to actually delete this project. The Club Dashboard with the list of project will appear with that project gone
 - b) Other Status projects you will only see View icon and Edit icon actions that takes you to the same areas mention above on Draft Status projects for these actions.

5 Club - View Grant

This area allows you to view general information on a project along with helpful information that determines graphically where a club project stands. Also, this screen can be viewed/appears via several paths throughout the Grant module processes for Club activities.

First access to this screen is when a person clicks on the Club Grant Dashboard list that shows a list of projects for that club and clicks on the View icon that shows further details on that project.

Since this activity may involve various security levels, for documentation purposes the instructions shown below are based on a Level 4 – Club Officer

View Grant

1 Download PDF
 2 Edit Grant

The overview of this grant is shown below. Funding information can be found on the graphs to the right.


Save The Eagles Email Test

New York, New York, USA

Grant Description

New York, test

Grant Location



Clubs Involved

Bank Masters - Test (Lead Club) Charter Date Not Listed, Phone: 123e
Club Email Not Listed

Grant Contacts

Robinson, Smokey Home: Not Listed, Office: Not Listed, Cell: Not Listed
ssoden@harcalagency.com

Total Project Budget

\$ 10.00

Requested Funding

\$ 1.00

Budget Summary

Income Items	
Income Item	Amount
Requested Funding	\$ 5.00
Other Funding Required	\$ 5.00
Summary:	\$ 10.00

Expense Items	
Expense Item	Amount
Summary:	\$ 0.00

Budget Summary

Label	Amount
Income	\$ 10.00
Expenses	\$ 0.00
Cashflow:	\$ 10.00

Grant Documents 7

GrantApplication.html

Grant Approvals

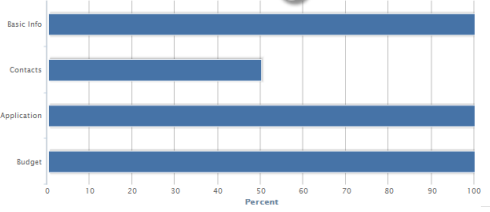
Club Signatures (0 Received)
No Signatures

District Signatures (0 Received)
No Signatures

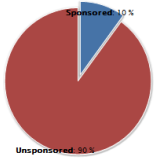
Status: Completed
Last Modified on 06/14/2013 at 06:40 PM

Surplus: \$10.00

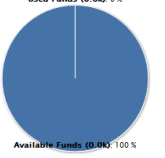
Grant Health 3



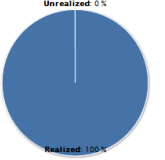
Sponsorship Percentage 4



Grant Budget Analysis 5



Total Budget Income 6



- 1) Download PDF - Allows you to download the Grant View for this project in case you want to save this view.
- 2) Edit Grant – will take you to 'Edit Grant' process for this project to make any changes. (See New Grant Request section further details on this process as the Edit process is the same)
- 3) Grant Health – shows the state of each of the following categories
 - a. Basic Info – % of data entered for the Details tab based on required fields
 - b. Contacts – % of contact entered based on 2 being the minimum required
 - c. Application - % of data entered for the Application tab based on required fields
 - d. Budget - % of Income/Total Budget
- 4) Sponsorship Percentage – % of Sponsor (DDF) vs Non-Sponsor (other) funding for the project
- 5) Grant Budget Analysis – shows the % of Cashflow (Available Funds) and Expenses (Used Funds)
- 6) Total Budget Income – show the % of Unrealized (Expense/Cashflow) and Realized
- 7) Grant Documents – will have links to documents for this project. Please note every project will have a GrantApplication.html that shows information from the application tab for this project (See Grant Details-Application section for further details on what appears)

6 New Grant Request

This area allows you to add a new Grant project to be approved by the District for DDF (District Designated Funds) funding. There are several tabs in this area that consists of the first view of only three tabs (Details, Contacts and Application) that are visible when you click on the New Grant Request button. The other three tabs (Budget, Documents and Activity Log) will appear once you save the Details tab.

Since this activity may involve various security levels, for documentation purposes the instructions shown below are based on a Level 4 – Club Officer. Also, it is assumed that you have clicked on the New Grant Request button as instructions start after you have done that.

6.1 Grant Details – Details

The Details tab is the default screen you will see when you first enter the Grants Details screen to add a new Grant.

Fill out the grant information shown below. Click "Save" when you are ready.



Details | Contacts | Application

Complete the basic grant information form below.

*Project Name:

*Project Country:

*Project State:

*Project City:

*Total Project Budget:

*Requested DDF:

*Project Description:

*Other Clubs Involved:

District Club List	Clubs Involved
Butter Ball - Test	Bank Masters - Test
Cambio - Test	
DaCdb Development Test	
Flank Steak - Test	
Frankenstein	
Level Testers	
No County Test	
NoClubbnd	
Nutterbutter - Test	
Region Zero	
Rotary Club of Hollywood	
Test Test Test	

- 1) Fields with * indicate they are mandatory. For this screen all fields are mandatory.
- 2) Enter your data for this project. If all mandatory fields aren't entered, you will get an error screen indicating which fields have not been completed when you hit the save button
- 3) Following are the options available on club selections:
 - a. Add Club (s)
 - i. Select the club (s) you want to get notification updates on this projects and hit
 - b. Delete Club (s)
 - i. You can move club (s) out by selecting the club (s) and hitting
 - c. Remove all Club (s)
 - i. You can remove all by hitting

Please note that at least one club must appear as you will get an error when you hit the Save button. Also, your club will automatically appear in this section when you first enter this screen.

- 4) Once you are done, click the Save button. If no errors appear, this project will be saved with a status of Draft. The Edit Grant screen will appear with three addition tabs, some budget graphics on the right side and the Collect Club Signatures button as shown in the screen sample below.

The current details regarding this grant are shown below. **New Tabs**

Collect Club Signatures Save

Details	Contacts	Application	Budget	Documents	Activity Log
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Income Items			Add Income Source
Item Name	Amount	Action	
Requested Funding	\$ 7,500.00	Edit - Delete	
Other Funding Required	\$ 7,500.00	Edit - Delete	
Summary:	\$ 15,000.00		

Expense Items			Add Expense
Item Name	Amount	Action	
Summary:	\$ 0.00		

Budget Summary		
Label	Amount	
Total Budget	\$ 15,000.00	
Income	\$ 15,000.00	
Expenses	\$ 0.00	
Cashflow:	\$ 15,000.00	

Surplus: \$ 15,000.00

Cash Analysis

Budget Alignment

5) To continue entry (See Grant Details – Contacts for further details on that process).

6.2 Grant Details – Contacts

This area allows you to identify the members to be included in automatic email notifications on this project. Please note that the person who creates this Grant project will automatically be added as a Club Member on this list.

Edit Grant: GrantSAS04 [2013-14] ID=112

The current details regarding this grant are shown below.

Collect Club Signatures Save

Details Contacts Application Budget Documents Activity Log

Select the members to be included in automatic email updates about this grant.

*Contacts:

Club Members Not Included	Club Members Involved
A1xxxxxx, A1xxBBB xxyy (Bank Masters - Test)	Aaa1, Aaatester B Mr (Bank Masters - Test)
AAA, AAA (Bank Masters - Test)	
AAAABBBB, AAAABBBB AAAABBBB (Bank Masters - Test)	
Aaa10, Aaatester B Mr (Bank Masters - Test)	
Aaa11, Aaatester B Mr (Bank Masters - Test)	
Aaa12, Aaatester B Mr (Bank Masters - Test)	
Aaa2, Aaatester B Mr (Bank Masters - Test)	
Aaa3, Aaatester B Mr (Bank Masters - Test)	
Aaa4, Aaatester B Mr (Bank Masters - Test)	
Aaa5, Aaatester B Mr (Bank Masters - Test)	
Aaa7, Aaatester B Mr (Bank Masters - Test)	
Aaa8, Aaatester B Mr (Bank Masters - Test)	
Aaa9, Aaatester B Mr (Bank Masters - Test)	
Aaaaa, Aaaaa (Bank Masters - Test)	
Aalders, Hendrik H. (Bank Masters - Test)	
Act1_Prod, Act1_Prod (Bank Masters - Test)	
Aol Mark, AOL Mark (Bank Masters - Test)	

>> << << All

- 1) Click on the Contacts tab
- 2) Following are the options available
 - a. Add member(s)
 - i. Select the member(s) you want to get notification updates on this projects and hit **>>** button to move over those member in the Club Members Involved column.
 - b. Delete member(s)
 - i. You can move member(s) out by selecting the member(s) and hitting **<<** button.
 - c. Remove all member(s)
 - i. You can remove all by hitting **<< All** button. This is used if you want to start all over to select the member(s) you want to add back on via a option above.

Please note that at least one member must appear as you will get an error once you hit the Save button. Also, your name will automatically appear in this section when you first enter this screen.

- 3) If you made all your changes, hit the Save button. If no errors appear, the Grant View screen will appear where you will see your changes in the Grant Contacts area
- 4) If you want to continue entry, click the Edit Grant button in the top right of the screen of the Grant View screen (see Grant Details – Application section for further details on that process).

6.3 Grant Details – Application

This area allows you to enter detailed grant application for these Grant project.

Edit Grant: GrantSAS05 [2013-14] ID=115

3

The current details regarding **1** grant are shown below.


Collect Club Signatures


Save

Details Contacts **Application** Budget Documents Activity Log

Fill out the detailed grant application form below.

Grant Timeframe

*Start Date: 

*Completion Date: 

Address To Mail Grant Payments

*Name:

*Address:

*City:

*State:

*Zipcode:

Project Definition

*Describe the project objectives.

*Humanitarian Efforts: Describe how the project will benefit the community and/or improve the lives of the less fortunate.

*Active Rotarian Involvement: Describe the nonfinancial participation by rotarians in the project.

*Publicity Plan: How will the general public know this is a rotary sponsored project?

*If the project involves a cooperating organization, please provide the name of the organization and attach a letter of participation in the documents section.

Club Statement Agreement

*The document is the ELECTRONIC APPLICATION defined in Section 2(d)(3) of the Memorandum of Understanding (MOU) provided by Rotary District 7770 for Clubs participating in the District Grant Program. It is an agreement between the Club and District 7770 explaining what measures the Club will undertake to ensure proper implementation of District Grant activities and management of Rotary Foundation Grants Funds. By authorizing this document, the Club agrees it will comply with all Foundation requirements contained within the MOU executed during Future Vision Grants Management Seminars conducted September and December 2012. Club MUST submit a Closing Report within 60 days of project completion.

Yes, I Understand and accept the terms of the Club Statement Agreement.

Trustee Guidelines & Matching Grant Awards Terms & Conditions

*By signing this grant request, I confirm that our Rotary Club is requesting a District Grant in the amount above will be spent in accordance with Trustee approved guidelines and the Terms and Conditions of Matching Grant Awards. All of the information contained herein is true and accurate.

Yes, I Understand and accept the terms and conditions.

- 1) Click Application tab
- 2) Complete entry for this application. All mandatory fields are identified with * . As you can see this application requires entry of all fields. Please note that if don't have a cooperating organization, just enter None
- 3) If you made all your changes, hit the Save button.
- 4) If no errors appear, the Grant View screen will appear. You can view those changes by clicking on the GrantApplication.html document shown on the Grant View screen. See the sample portion of that screen below.
- 5) If you want to continue entry, click the Edit Grant button in the top right of the screen of the Grant View screen (see Grant Details – Budget section for further details on that process). See the sample portion of that screen below.



6.4 Grant Details – Budget

This area allows you to enter budget details. Please note that some information is automatically generated in this budget area based on what was entered in the Details tab.

Edit Grant: GrantSAS06 [2013-14] ID=114

The current details regarding this grant are shown below.

Collect Club Signatures Save

Details Contacts Application Budget Documents Activity Log

Income Items Add Income Source

Item Name	Amount	Action
Requested Funding	\$ 4,000.00	Edit - Delete
Other Funding Required	\$ 4,000.00	Edit - Delete
Summary:	\$ 8,000.00	

Expense Items Add Expense

Item Name	Amount	Action
Summary:	\$ 0.00	

Budget Summary

Label	Amount
Total Budget	\$ 8,000.00
Income	\$ 8,000.00
Expenses	\$ 0.00
Cashflow:	\$ 8,000.00

Surplus: \$ 8,000.00

Cash Analysis

Spent Cash: 0 %

Cash Available: 100 %

Budget Alignment

Unaligned: 0 %

Aligned: 100 %

- 1) Click on Budget tab
- 2) Income Items shown are automatically determined based on some entry in the Details tab:
 - a. Requested Funding = Details “Requested DDF” entry
 - b. Other Funding Required = Details ‘Total Project Budget’ minus Details ‘Requested DDF’
- 3) What appears is based on your security. This sample shows Edit or Delete actions. Please note once you hit the delete action, that item will be gone.
- 4) If you need to add a line item to the Income section, click on the Add Income button. The following screen identifies what entry is required to add this line item. Once entry is completed, hit the Add button to add your entry.

Add Income Source

Description

Amount

Funding Source DDF Other

Add Cancel

- 5) If you need to add a line item to the Expense section, click on the Add Expense button. The following screen identifies what entry is required to add this line item. Once entry is completed, hit the Add button to add your entry.

Add Income Source

Description

Amount

Funding Source DDF Other

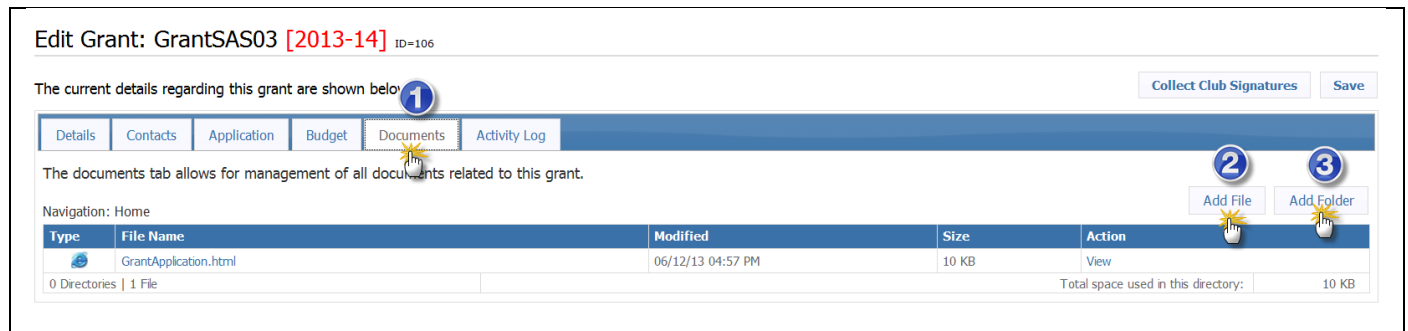
- 6) The Budget Summary section shows the total Budget along with the totals from Income and Expenses to determine the Cashflow.
- 7) The right side of the view shows changes to the graphics. Also, it shows if project has a Surplus or is Overbudget based on your changes
- 8) If you made all your changes, hit the Save button.
- 9) If no errors appear the Grant View screen will appear. You can see these changes by reviewing the Budget Summary area. See the sample portion of that screen below.
- 10) If you want to continue entry, click the Edit Grant button in the top right of the screen of the Grant View screen (see Grant Details – Documents section for further details on that process). See the sample portion of that screen below.

Income Items	
Income Item	Amount
Requested Funding	\$ 500.00
Other Funding Required	\$ 500.00
Summary:	\$ 1,000.00
Expense Items	
Expense Item	Amount
Supplies	\$ 50.00
Summary:	\$ 50.00
Budget Summary	
Label	Amount
Income	\$ 1,000.00
Expenses	\$ 50.00
Cashflow:	\$ 950.00

6.5 Grant Details – Documents

This area allows you to upload documents that provide further details on your Grant project to assist in the approval process. The data in the Application tab is automatically loaded in this area as GrantApplication.html upon every save.

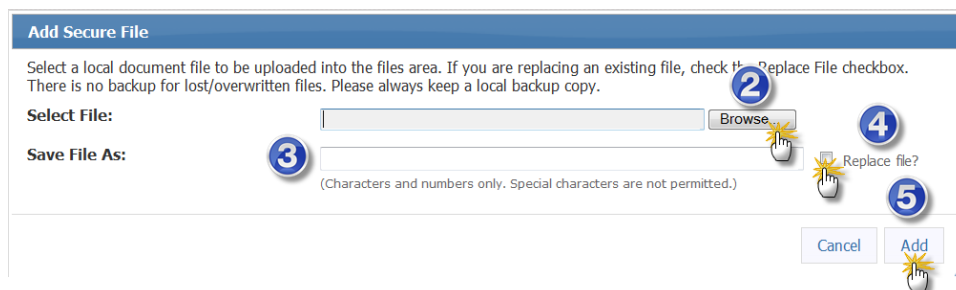
- 1) Click the Documents tab in the Edit Grant screen, the following screen will appear that allows you to
 - a. Add a Folder with Files
 - b. Add a File
- 2) To add a file that is not linked to a folder, click the Add File button and continue to Section Upload a File for further details in that process.
- 3) To add a folder with files in that folder, click the Add Folder button and continue to Section Create a Folder With Files for further details in that process.



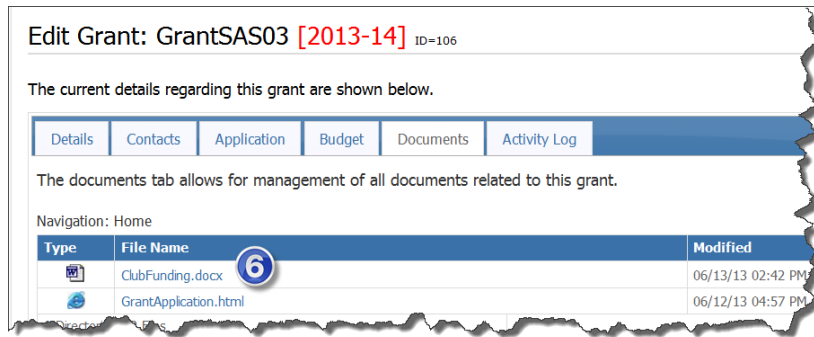
6.5.1 Upload a File

Instructions shown below assume that the user is on the Documents tab in Edit Grant for the project they want to upload a file and have clicked the Add File button.

- 1) The Add Secure File screen will appear that allows you to upload a file as shown below
- 2) Click the Browse button to select the file you want to load from your computer
- 3) Enter the name for the file you want saved. Please note that spaces or special characters are not permitted.
- 4) If you want to replace an existing file with the same name with this file, click the Replace File? checkbox.
- 5) Click the Add button to upload your file



- 6) The Edit Grant screen will appear with the Documents tab shown and the document you uploaded will appear as shown in the sample portion of that screen below. You can view the document by clicking on the document name link to confirm you've uploaded the document you wanted if you like.

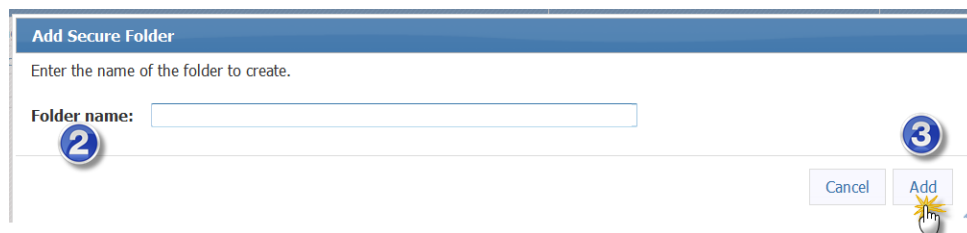


- 7) If you want to upload another document, click the Add File on this screen and repeat Steps 1 – 7, otherwise, processing stops here.

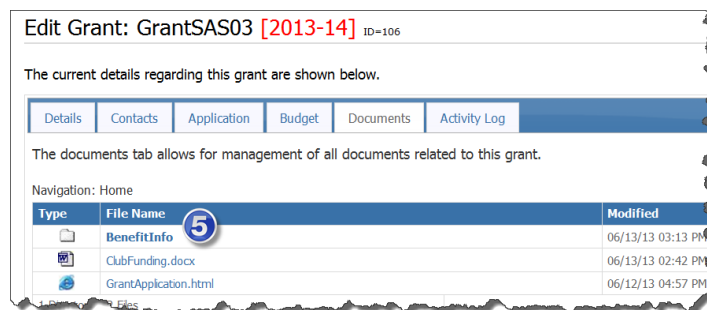
6.5.2 Create a Folder with a File

Instructions shown below assume that the user is on the Documents tab in Edit Grant for the project they want to upload a file in a folder and have clicked the Add Folder button as instructions start after that activity is done.

- 1) The Add Secure Folder window will appear as shown in the sample screen below
- 2) Enter the Folder name
- 3) Click the Add button to save your folder

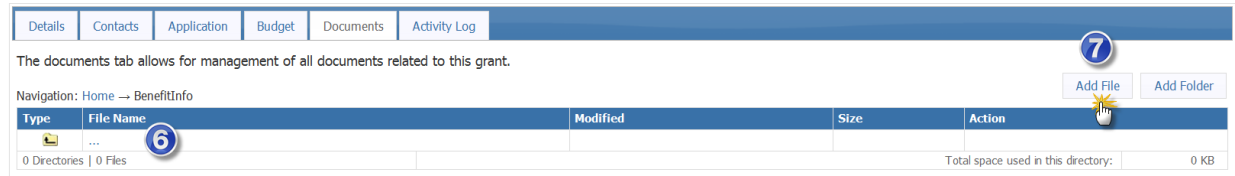


- 4) The Edit Grant screen will appear with the Documents tab shown and the folder you added is listed as shown in the sample screen below
- 5) Click on the folder name so that the file you add will be placed in this folder.
- 6) The Edit Grant screen will appear with the Documents tab. However, the lower level of the folder will show as seen in the sample screen below. Please note that this folder doesn't show any files yet so the File Name is blank.
- 7) Click on the Add File button

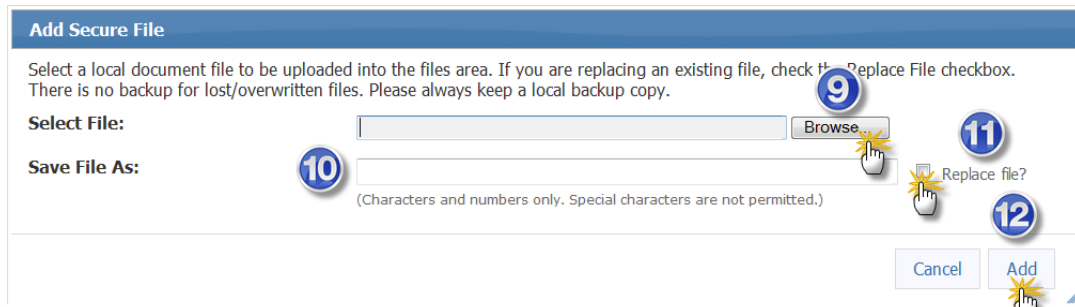


The current details regarding this grant are shown below.

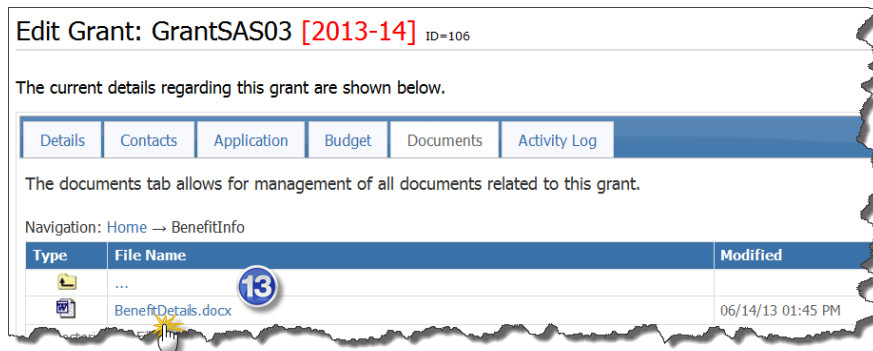
Collect Club Signatures Save



- 8) The Add Secure File screen will appear that allows you to upload a file as shown below
- 9) Click the Browse button to select the file you want to load from your computer
- 10) Enter the name for the file you want saved. Please note that spaces or special characters are not permitted.
- 11) If you want to replace an existing file with the same name with this file, click the Replace File? checkbox.
- 12) Click the Add button to upload your file



- 13) The Edit Grant screen will appear with the Documents tab shown and the document you uploaded will appear as shown in the portion of the sample screen below. You can view the document by clicking on the document name link to confirm you've uploaded the document you wanted if you like



- 14) If you want to upload another document in this folder, click the Add File on this screen and repeat Steps 8-14, otherwise, processing stops here.

6.6 Grant Details – Activity Log

This section allows you to see the activity that has occurred on this project. Please note that some activity items show an entry of Grant saved successfully but not what was saved.

Following is a sample screen of a project that has activity.

Edit Grant: GrantSAS03 [2013-14] ID=106

The current details regarding this grant are shown below. Collect Club Signatures Save

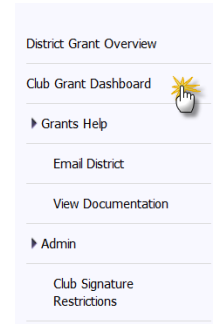
Details	Contacts	Application	Budget	Documents	Activity Log
The activity log shows a summary of all changes made in the district grant module.					
Date / Time	User Name	Activity			
06/14/2013 01:45:52	Aaa1, Aaatester B Mr	A file was added - BenefitDetails - C:\CFusion8\runtime\servers\coldfusion\SERVER-INF\temp\wwwroot-tmp\neotmp2088979476852620987.tmp			
06/14/2013 11:28:56	Aaa1, Aaatester B Mr	Budget item Paper was added. Amount: 10 - Credit: 0 - Debit: 1			
06/14/2013 11:20:36	Aaa1, Aaatester B Mr	Grant was saved successfully.			
06/14/2013 11:20:21	Aaa1, Aaatester B Mr	Budget item Supplies was added. Amount: 50 - Credit: 0 - Debit: 1			
06/14/2013 11:20:06	Aaa1, Aaatester B Mr	Budget item Supplies was deleted. Amount: 500.0000 - Credit: 0 - Debit: 1			
06/14/2013 11:04:00	Aaa1, Aaatester B Mr	Grant was saved successfully.			
06/13/2013 11:53:26	Aaa11, Aaatester B Mr	A new club Contact was added to the list of users included in this grant. (UserID: #800010242)			
06/13/2013 11:53:26	Aaa11, Aaatester B Mr	Grant was saved successfully.			
06/13/2013 11:25:52	Aaa11, Aaatester B Mr	Grant was saved successfully.			
06/13/2013 11:21:58	Aaa11, Aaatester B Mr	Budget item Supplies was added. Amount: 500 - Credit: 0 - Debit: 1			
06/13/2013 05:28:03	Aaa1, Aaatester B Mr	A file was added - BenefitInfo - C:\CFusion8\runtime\servers\coldfusion\SERVER-INF\temp\wwwroot-tmp\neotmp3902126842787686345.tmp			
06/13/2013 03:13:11	Aaa1, Aaatester B Mr	A folder was created - BenefitInfo			
06/13/2013 02:42:27	Aaa1, Aaatester B Mr	A file was added - ClubFunding - C:\CFusion8\runtime\servers\coldfusion\SERVER-INF\temp\wwwroot-tmp\neotmp5312245006291422907.tmp			
06/12/2013 04:57:19	Aaa1, Aaatester B Mr	Grant status set as Draft			
06/12/2013 04:57:19	Aaa1, Aaatester B Mr	1 Emails were sent to club contacts regarding state change to Accepting Signatures			
06/12/2013 04:57:19	Aaa1, Aaatester B Mr	3 Emails were sent to club signees regarding state change to Accepting Signatures			
06/12/2013 04:57:19	Aaa1, Aaatester B Mr	Grant was saved successfully.			
06/09/2013 09:14:59	Aaa11, Aaatester B Mr	Grant status set as Accepting Signatures			
06/09/2013 09:14:59	Aaa11, Aaatester B Mr	1 Emails were sent to club contacts regarding state change to Draft			
06/09/2013 09:14:59	Aaa11, Aaatester B Mr	2 Emails were sent to club signees regarding state change to Draft			
06/09/2013 09:14:59	Aaa11, Aaatester B Mr	Grant was saved successfully.			
06/09/2013 09:14:17	Aaa11, Aaatester B Mr	Grant was saved successfully.			
06/09/2013 09:12:42	Aaa11, Aaatester B Mr	Grant GrantSAS03 was created.			

7 Club Signature Approvals

This section covers the processing steps required of Club members that have approval to review Club Grants requests for approval to send it to the District for their final approval. These instructions assume that you have clicked on the Grants tab and are listed as a Club approver to sign off this Grant project.

Since this activity may involve various security levels, for documentation purposes the Instructions shown below are based on a Level 5 – Area Admin that is an approved member to sign off for Club Grant projects.

- 1) Click on Club Grant Dashboard list on the left side of the screen as shown here



- 2) The Club Grant Dashboard appears for the current OrgYear as shown below.

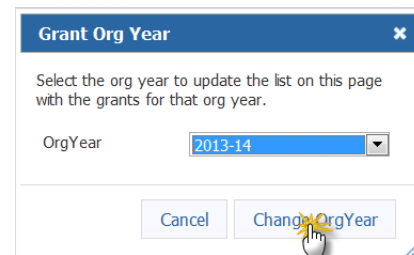
Club Bank Masters - Test Grant Dashboard [2012-13]

A summary is shown below of all grants submitted to the District in this Club.

[To Excel](#) [PMail](#) [Change OrgYear](#) [New Grant Request](#)

Club Grants						
	Action	Project Name	Club	Status	Total Project Budget	Requested DDF
<input type="checkbox"/>		SCTest	Bank Masters - Test	Draft	\$ 3.00	\$ 1.00
<input type="checkbox"/>		Test1	Bank Masters - Test	Draft	\$ 2.00	\$ 1.00
<input type="checkbox"/>		TestMubContcts	Bank Masters - Test, Butter Bal - Test	Draft	\$ 3,333.00	\$ 22.00
<input type="checkbox"/>		Save The Trees	Bank Masters - Test, Butter Bal - Test	Accepting Signatures	\$ 5,000.00	\$ 2,500.00
<input type="checkbox"/>		TestAA	Bank Masters - Test	Accepting Signatures	\$ 436.00	\$ 34.00
<input type="checkbox"/>		Hals New Grant	Bank Masters - Test, Flank Steak - Test	Approved	\$ 5,000.00	\$ 2,500.00
<input type="checkbox"/>		Save The Eagles Email Test	Bank Masters - Test	Completed	\$ 10.00	\$ 1.00
<input type="checkbox"/>		TestSAS01	Bank Masters - Test	Completed	\$ 1,500.00	\$ 600.00

























- 3) If you need to change the OrgYear, continue to the next Step, otherwise, skip to Step 8:
- 4) Click Change OrgYear button, select year period and click Change OrgYear button. A new Club Grant Dashboard screen will appear with the updated list of projects for the OrgYear you selected as shown in the sample Club Grant Dashboard for 2013-14 below.





A summary is shown below of all grants submitted to the District in this Club.

[To Excel](#) [PMail](#) [Change OrgYear](#) [New Grant Request](#)

Club Grants							
	Action	Project Name	Club	Status	Total Project Budget	Requested DDF	
<input type="checkbox"/>	  	sdgsdgsdg	Bank Masters - Test	Draft	\$ 59,099.00	\$ 2,500.00	
<input type="checkbox"/>	 	GrantSAS06	Bank Masters - Test	Accepting Signatures	\$ 9,000.00	\$ 3,000.00	
<input type="checkbox"/>	 	GrantSAS08	Bank Masters - Test	Accepting Signatures	\$ 6,000.00	\$ 1,000.00	
<input type="checkbox"/>	 	GrantSASLV1	Bank Masters - Test	Accepting Signatures	\$ 5,000.00	\$ 1,000.00	
<input type="checkbox"/>	 	GrantSAS01	Bank Masters - Test, Butter Ball - Test, Flank Steak - Test	Submitted For Approval	\$ 20,000.00	\$ 10,000.00	
<input type="checkbox"/>	 	GrantSAS09	Bank Masters - Test	Submitted For Approval	\$ 14,000.00	\$ 7,000.00	
<input type="checkbox"/>	 	GrantSAS07	Bank Masters - Test	Need More Information	\$ 12,000.00	\$ 6,000.00	
<input type="checkbox"/>	 	GrantSAS03	Bank Masters - Test	Approved	\$ 1,000.00	\$ 500.00	
<input type="checkbox"/>	  	GrantSAS05	Bank Masters - Test	Rejected	\$ 11,000.00	\$ 5,000.00	
<input type="checkbox"/>	 	GrantSAS04	Bank Masters - Test	Completed	\$ 6,000.00	\$ 1,000.00	
<input type="checkbox"/>	 	GrantSAS02	Bank Masters - Test	Paid	\$ 8,000.00	\$ 2,000.00	

- 5) You can review the Grant by clicking on the View icon (Action column) for the project you want to review for approval.
- 6) Once you click on the View icon, the Grant View screen will appear for your review as shown in the following example.

View Grant

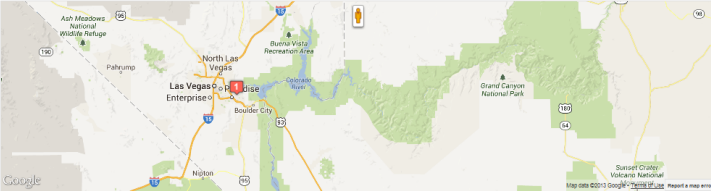
The overview of this grant is shown below. Funding information can be found on the graphs to the right.

9 11
[Download PDF](#) [Edit Grant](#)

GrantsAS04
 Henderson, Nevada USA

Grant Description
 Test

Grant Location



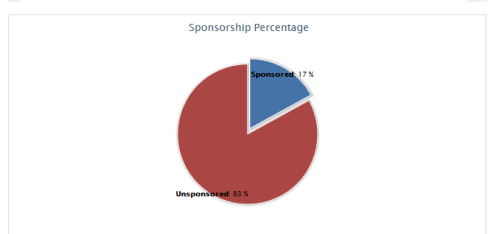
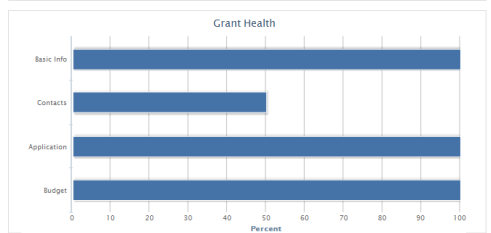
Clubs Involved
 Bank Masters - Test (Lead Club) Charter Date Not Listed, Phone: 1234
 Club Email Not Listed

Grant Contacts
 Aaa11, Aaaitester B Mr rotanytest76@gmail.com Home: (777) 123-1244 Office: 444-123-1244 Cell: Not Listed

Total Project Budget

Status: Completed
 Last Modified on 06/15/2013 at 12:42 PM

Surplus: \$6,000.00

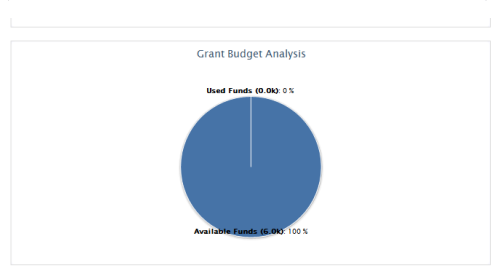


Requested Funding
 \$ 6,000.00

Budget Summary

Income Item	Amount
Requested Funding	\$ 3,000.00
Other Funding Required	\$ 3,000.00
Summary:	\$ 6,000.00

Expense Item	Amount
Summary:	\$ 0.00



Grant Documents 7
[GrantApplication.html](#)

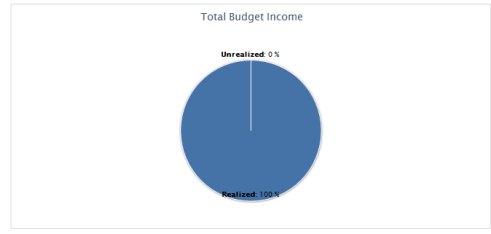
Grant Approvals 8

Club Signatures (2 Received)

Name	Position	Date
Robinson, Smokey	Member	06/12/13 10:23 PM
Aaa11, Aaaitester B Mr	Club Admin Chair	06/12/13 10:25 PM

District Signatures (2 Received)

Name	Position	Date
Robinson, Smokey	Position Not Listed	06/12/13 10:27 PM
Robinson, Smokey	Position Not Listed	06/12/13 10:28 PM



7) You can view the Application portion of this grant by clicking on the GrantApplication.html link under the Grants Documents area. The following is a sample of what would appear (SCREEN IS BEING MODIFIED AND WILL INCLUDE AN UPDATED SAMPLE SCREEN SOON)

Grant Timeframe TEST

*Start Date: 07/04/2013
 *Completion Date: 07/31/2013

Address To Mail Grant PaymentS

*Name: Mary Jane
 *Address: Maple
 *City: Henderson
 *State: NV
 *Zipcode: 89243

Project Definition

*Describe the project objectives.
 test

*Humanitarian Efforts: Describe how the project will benefit the community and/or improve the lives of the less fortunate.
 test

*Active Rotarian Involvement: Describe the nonfinancial participation by rotarians in the project.
 test

*Publicity Plan: How will the general public know this is a rotary sponsored project?
 test

*If the project involves a cooperating organization, please provide the name of the organization and attach a letter of participation in the documents section.
 None

Club Statement Agreement

*This document is the ELECTRONIC APPLICATION defined in Section 2(d)(3) of the Memorandum of Understanding (MOU) provided by Rotary District 7770 for Clubs participating in the District Grant Program. It is an agreement between the Club and District 7770 explaining what measures the Club will undertake to ensure proper implementation of District Grant activities and management of Rotary Foundation Grants Funds. By authorizing this document, the Club agrees it will comply with all Foundation requirements contained within the MOU executed during Future Vision Grants Management Seminars conducted September and December 2012. Club MUST submit a Closing Report within 60 days of project completion.

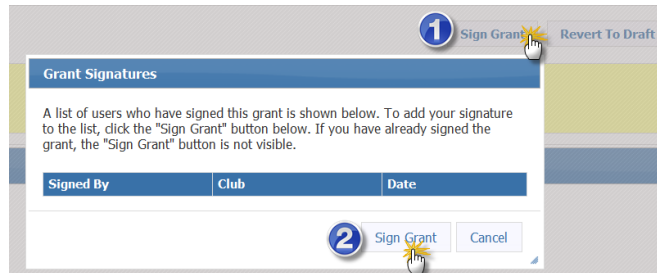
Yes, I Understand and accept the terms of the Club Statement Agreement.

Trustee Guidelines & Matching Grant Awards Terms & Conditions

*By signing this grant request, I confirm that our Rotary Club is requesting a District Grant in the amount above will be spent in accordance with Trustee approved guidelines and the Terms and Conditions of Matching Grant Awards. All of the information contained herein is true and accurate.

Yes, I Understand and accept the terms and conditions.

- 8) The Grant Approvals area shows signature approvals so far
 - 9) You can download this view as a PDF doc by clicking on the Download PDF button.
 - 10) If everything is acceptable for approval continue to Step 11, otherwise work with Grant Contact individual to resolve any issues. If the Grant project has to be reverted to a Draft status for further modifications the club member responsible for working on this grant will take care of that process. Your process STOPS at this point
 - 11) To approved the Club Grant:
 1. Click the Edit Grant button. The Edit Grant screen will appear
 2. Click the Sign Grant button . The Club Signatures window will appear with a list of people who have approved this grant so far.
 3. Click the Sign Grant button to approve this grant.
- Following is a sample screen of above steps.



- 12) The View Grant screen will appear and you should see your signature under the Grant approval section of the screen. Sample portion of the View Grant screen with your signature is shown below

Grant Approvals		
Club Signatures (1 Received)		
Aaa11, Aaatester B Mr e/Signature	Club Admin Chair Club Position	06/12/13 05:20 PM Date
District Signatures (0 Received)		
No Signatures		

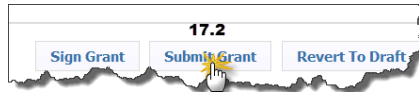
- 13) If you are the second signature required to approve this grant, continue to the next step, otherwise your process stops at this point. Please note that usually a minimum of 2

signatures are required per club on this project. Also, when the required signatures are met, the Submit Grant button will appear in the Edit Grant screen.

14) Being the last person required to signoff this grant to go to the District for their approval, there are a few more activities you need to do:

1. Click Edit Grant button on View Grant screen, the Edit Grant window will appear
2. Click Submit Grant button, the View Grant screen will appear showing the status as Submitted for Approval

See a portion of the various sample screens below for activities indicated.



8 Create an Excel Document (To Excel Button)

This section covers the process steps required to create an excel document for the Grant projects you want that has some summary information of the Grant.

These instructions assume that you have clicked on the Club Grant Dashboard list on the left side of the screen. Since this activity may involve various security levels, for documentation purposes the instructions shown below are based on a Level 4 – Club Officer.

- 1) Click on the checkbox next to the Grant project (s) you want to create an excel document for.
- 2) Click the To Excel button.
- 3) A window will appear that says 'Do you want to open or save GrantsExcel.xls from www.directory-online.com'. Click the Open button as it's better to review it before you save this document in case you change your mind. See sample screen below.
- 4) You will get a message window indicating that the format is different than the file extension (xls) because it is open as a Web Page, click yes
- 5) The document will open with the project (s) you have selected as shown in the sample below. Please note for viewing purposes, that the columns were formatted to fit text.
- 6) If you want to save this document as an excel document:
 - a. Complete the Save As function in Excel to save this document to your computer. However, remember to change the 'Save as type' to an 'Excel Workbook'
 See a portion of the sample screen that was done to save this document below

Club Bank Masters - Test Grant Dashboard [2012-13]

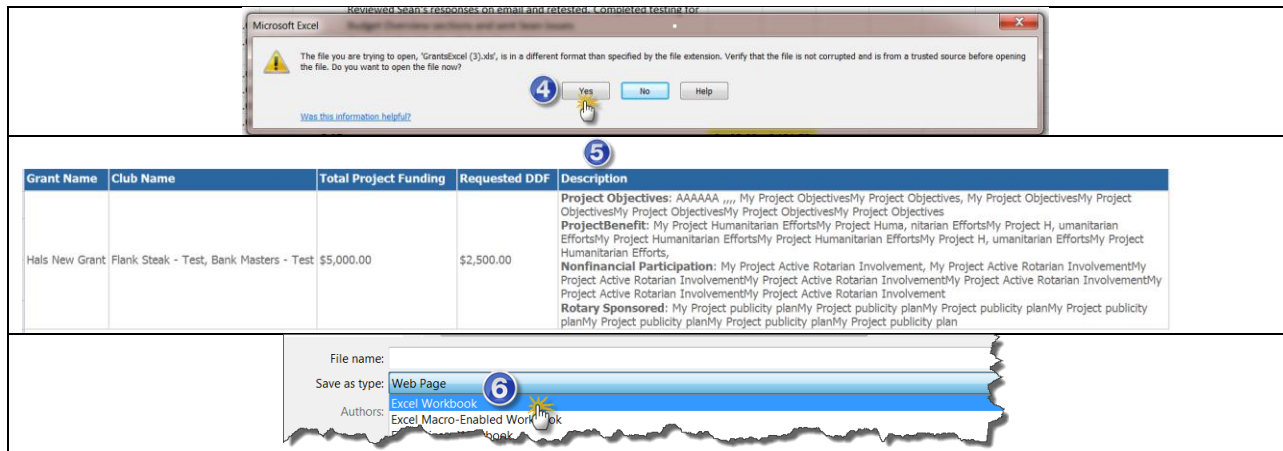
A summary is shown below of all grants submitted to the District in this Club.

2 To Excel PMail Change OrgYear New Grant Request

Club Grants	Action	Project Name	Club	Status	Total Project Budget	Requested DDF
<input type="checkbox"/>		SCTest	Bank Masters - Test	Draft	\$ 3.00	\$ 1.00
<input type="checkbox"/>		Test1	Bank Masters - Test	Draft	\$ 2.00	\$ 1.00
<input type="checkbox"/>		TestMubContacts	Bank Masters - Test, Butter Ball - Test	Draft	\$ 3,333.00	\$ 22.00
<input type="checkbox"/>		Save The Trees	Bank Masters - Test, Butter Ball - Test	Accepting Signatures	\$ 5,000.00	\$ 2,500.00
<input type="checkbox"/>		TestAA	Bank Masters - Test	Accepting Signatures	\$ 436.00	\$ 34.00
<input type="checkbox"/>		Hals New Grant	Bank Masters - Test, Flank Steak - Test	Approved	\$ 5,000.00	\$ 2,500.00
<input type="checkbox"/>		Save The Eagles Email Test	Bank Masters - Test	Completed	\$ 10.00	\$ 1.00
<input type="checkbox"/>		TestSA501	Bank Masters - Test	Completed	\$ 1,500.00	\$ 600.00

1

Do you want to open or save GrantsExcel.xls from www.directory-online.com? **3** Open Save Cancel



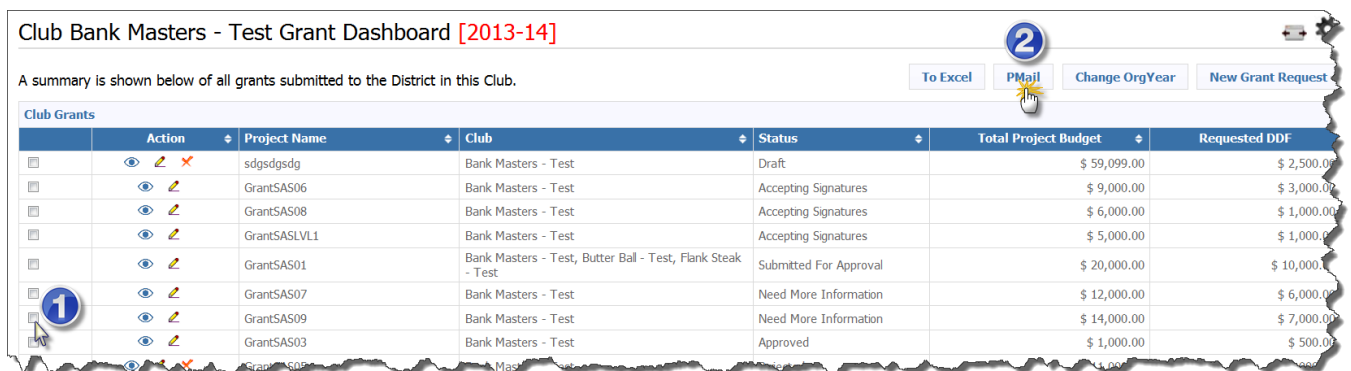
9 PMail

This section covers the processing steps required to send a PMail on grant projects.

These instructions assume that you are in the Club Grant Dashboard and are about to start the PMail process. Since this activity may involve various security levels, for documentation purposes the instructions shown below are based on a Level 4 – Club Officer

- 1) Click on the checkbox for the project (s) you want to send a PMail on.
- 2) Click PMail button to generate a PMail.
- 3) The Personalize Email (PMail) screen will appear, click on the Compose tab.
- 4) The From/To/CC info is shown here. You have the ability to add any members to the list of the To/CC by following the instruction in that area.
- 5) To compose your message highlight 'Start YOUR Message Here...' and type your message
- 6) If you need to send any attachments, follow the instructions in this area of the screen
- 7) Once you are done, you can send this PMail by clicking on the Save button either at the top or bottom of this screen to complete this process.

Following are sample screens/portion of screens for the above processes.



Personalized Email (PMail)

NOTICE: Long PMAIL messages should be composed in **your** E-mail program (Outlook or Eudora), since this **SESSION EXPIRES in 45 minutes**. And you can "spell check" your work **before** you Copy & Paste your message into the Message box below.

3

EZLink Templates Compose PMail Groups Tracking

EZLink Template Select

To **Select** an EZ Link template, click on a radio button below. To **Preview** the template, click on the template name.
To create a new template, click [Save PMail] in the Compose Tab - select the appropriate folder to save the template under.
Your last PMail will be automatically saved in your **Personal** folder under the name **\$My Last PMail**.

System District Club **Personal**

Personalized Email (PMail)

NOTICE: Long PMAIL messages should be composed in your E-mail program (Outlook or Eudora), since this SESSION EXPIRES in 45 minutes. And you can "spell check" your work **before** you Copy & Paste your message into the Message box below.

7

Send

EZLink Templates **Compose** **PMail Groups** **Tracking**

Compose PMail UserIDs

FROM: Sylvia Soden (Email "Friendly" Display Name)
From Email: slandmann@gmail.com (Bounced EMail messages are returned to this address)
ReplyTo Email: slandmann@gmail.com (Member's will reply to this address)

TO: Landmann, Mark R Test; 1 Members - Active (1)


CC:

***Your Subject:** **TEST - Members** (must be valid file name - no special characters)

***The Message:** Select Editor mode: Rich Text Editor Text (for mobile devices, e.g. iPhone/iPad, Blackberry, Droid) Save PMail

EZ Link Templates


Notes: {%FName%} will be replaced with the first name or badge/nick name.

Click on the  icon to spell check your document with **ieSpell**. **(IE Only)**

Download the integrated spell checker **ieSpell** [here](#).

Dear {%FName%},

Start YOUR Message Here...

Attachments: PMAIL attachments limited to 10MB each ([Why -- Click Here?](#))
Click on the paper clip  ICON.

Send Options:

- Attach a file (up to 5 files can be attached)
- Send **Only Me** a Test Email - Emails **WILL NOT** go to TO/CC list (the first "TO" person will be used as an example)
- Show ALL TO Members on Email
- Un-check this if you do not want to see a list of all member(s) being PMAiled.
- Include List Source? ([What is this?](#))
- Track All members in PMail? ([What is this?](#)) (This must be checked to PMail members that did not read the message.)
- Include Opt-Out link in PMail? ([What is this?](#))

7

Send

Need help? [View The Pmail User Documentation](#)

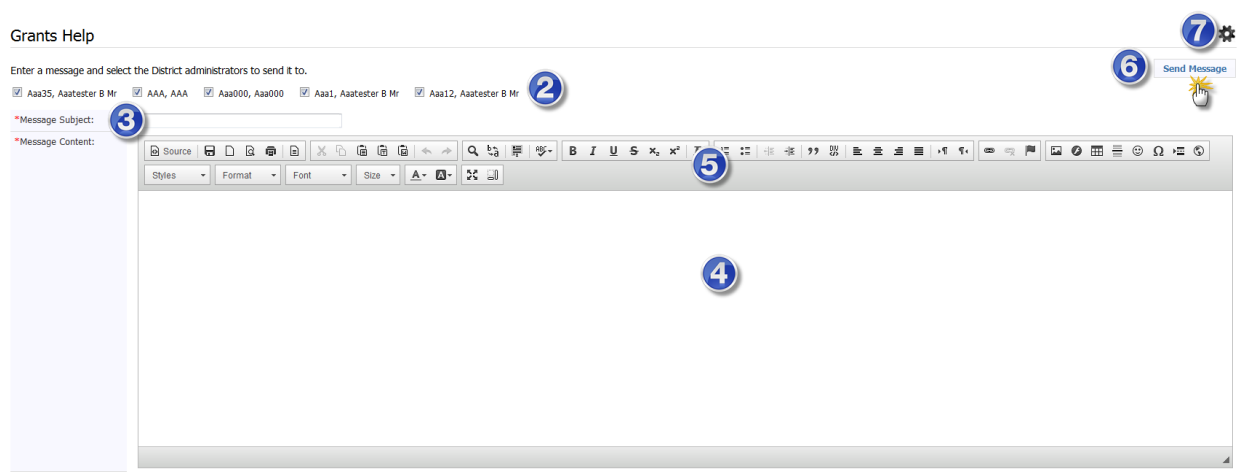
10 Email District

This section covers the processing steps required to send an email notification to your District Administrator.

These instructions assume that you have clicked on the Email District list (under Grants Help) on the left side of the screen and you have the security needed to access this process.

Since this activity may involve various security levels, for documentation purposes the instructions shown below are based on a Level 4 – Club Officer.

- 1) Click on the Email District list on the lefts side of the screen
- 2) There is a list of District Administrators this email is being sent to with all boxes checked. You can uncheck any person you don't want getting this email.
- 3) Enter your Message Subject
- 4) Enter Message Content
- 5) Modify any format changes via the tools shown if necessary. If you move your mouse over the icon, it will indicate what this tool is to help in the content of the message.
- 6) Once you are done and ready to send your email, click the Send Message button
- 7) Please note there currently is a Customize button, however, this is for future functionality



11 Change Signature Approvers


This section covers the processing steps required to change what members are approved to signoff Grants.

These instructions assume that you have clicked on the Club Signature Restrictions list (under Admin) on the left side of the screen. Since this activity may involve various security levels, for documentation purposes the instructions shown below are based on a Level 4 – Club Officer.

- 1) Options available:
 - a. Add member(s)
 - i. Select the member(s) you want to give approval to signoff Club Grants on projects and hit button to move over the member(s) in the Club Members Involved column.
 - b. Delete member(s)
 - i. You can move member(s) out by selecting the member(s) and hitting .

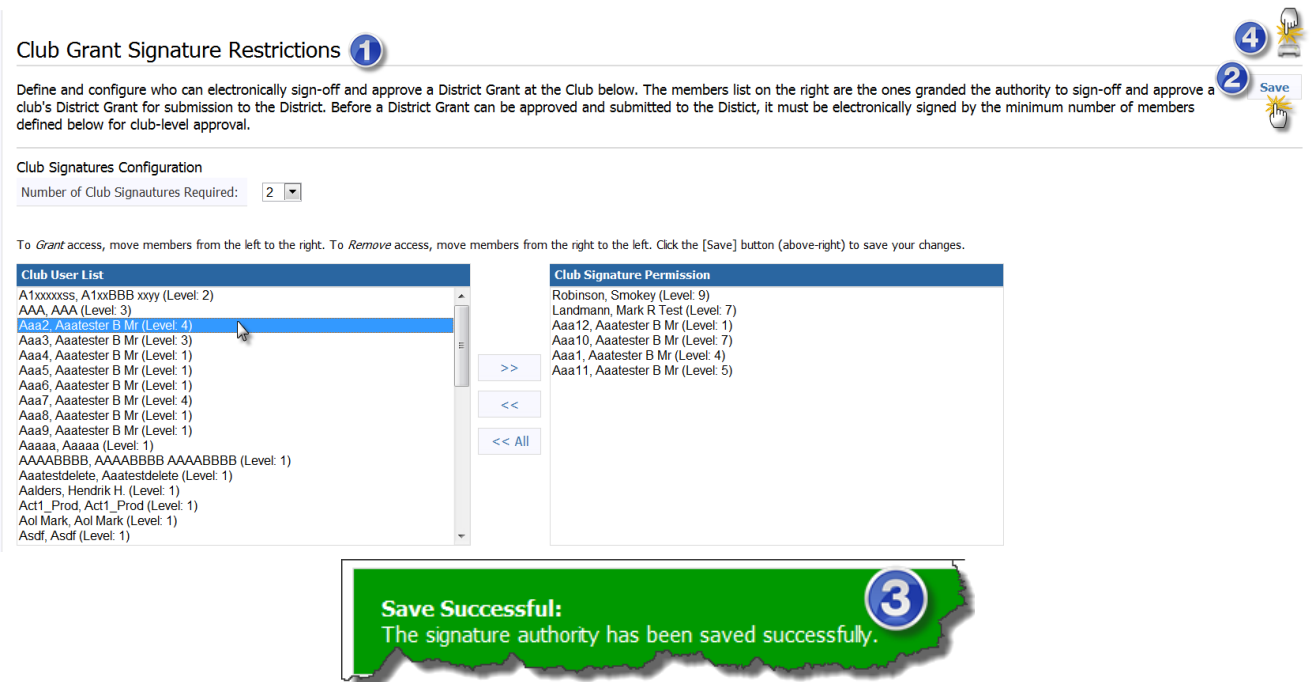
button.

c. Remove all member(s)

i. You can remove all by hitting  All button. This is used if you want to start all over to select the member(s) you want to add back on via option a above.

Please note that at least 1 member must appear as you will get an error once you hit the Save button.

- 2) Once you are done making your changes, click the Save button
- 3) You will get a message that your changes have been saved as shown in the sample portion of this screen below
- 4) If you want to print this screen at any point in time, click the print icon.



Club Grant Signature Restrictions 1

Define and configure who can electronically sign-off and approve a District Grant at the Club below. The members list on the right are the ones granted the authority to sign-off and approve a club's District Grant for submission to the District. Before a District Grant can be approved and submitted to the District, it must be electronically signed by the minimum number of members defined below for club-level approval.

Club Signatures Configuration

Number of Club Signatures Required: 2

To *Grant* access, move members from the left to the right. To *Remove* access, move members from the right to the left. Click the [Save] button (above-right) to save your changes.

Club User List	Club Signature Permission
A1xxxxss, A1xxBBB xxyy (Level: 2)	Robinson, Smokey (Level: 9)
AAA, AAA (Level: 3)	Landmann, Mark R Test (Level: 7)
Aaa2, Aaatester B Mr (Level: 4)	Aaa12, Aaatester B Mr (Level: 1)
Aaa3, Aaatester B Mr (Level: 3)	Aaa10, Aaatester B Mr (Level: 7)
Aaa4, Aaatester B Mr (Level: 1)	Aaa1, Aaatester B Mr (Level: 4)
Aaa5, Aaatester B Mr (Level: 1)	Aaa11, Aaatester B Mr (Level: 5)
Aaa6, Aaatester B Mr (Level: 1)	
Aaa7, Aaatester B Mr (Level: 4)	
Aaa8, Aaatester B Mr (Level: 1)	
Aaa9, Aaatester B Mr (Level: 1)	
Aaaaa, Aaaaa (Level: 1)	
AAAABBBB, AAAABBBB AAAABBBB (Level: 1)	
Aaatestdelele, Aaatestdelele (Level: 1)	
Aalders, Hendrik H. (Level: 1)	
Act1_Prod, Act1_Prod (Level: 1)	
Aol Mark, Aol Mark (Level: 1)	
Asdf, Asdf (Level: 1)	

Save Successful: 3
The signature authority has been saved successfully.