FUNDING OPPORTUNITIES
Module: Fundraising

➢ **Search for funding**
- ✓ Select module: **Fundraising > Funding opportunities**
- ✓ Define your search criteria by the dropdown menues and click **Search**
- ✓ Click **Reset** to clear the search
- ✓ Click the **Export** tab at the top to export funding opportunities to Excel or PDF
- ✓ Select funding opportunities by check boxes to the right and click **Excel (selected)** or **PDF (selected)**

➢ **Schedule the application activities (up to 3 years)**
- ✓ Select module: **Fundraising > Funding lists**
- ✓ Click **+New**
- ✓ Name the list and click **Save**
- ✓ Select module: **Fundraising > Funding opportunities**
- ✓ Define your search criteria and click **Search**
- ✓ Select funding opportunities by check boxes to the right
- ✓ Select the **Funding lists** tab at the top
- ✓ Click the **Funding lists** search field and add one or more Funding lists
- ✓ Click **Add selected opportunities to list(s)**
- ✓ Select module: **Fundraising > Funding lists**
- ✓ Select funding lists by check boxes to the right and the funding plan will be shown in a Gantt chart (in the **View options** tab at the top you can change number of months in the Gantt chart and click **Save**)
- ✓ Select the **Export** tab at the top and click **PDF (Gantt)** to export the chart to PDF

➢ **Strategic fundraising**
- ✓ Select module: **Fundraising > Funding strategies**
- ✓ Click **+New**
- ✓ Name the strategy and select funding lists to be added, then click **Save**
- ✓ Select funding strategies by check boxes to the right and the strategy will be shown as cards in a quarterly chart (in the **View options** tab at the top you can change number of quarters in the chart and click **Save**)
- ✓ Select the **Export** tab at the top and click **PDF (Cards)** to export the strategy to PDF

APPLICATION SUCCESS
Module: Applications

➢ **Status of submitted grant applications**

✓ Select module: **Applications > Grant applications**
✓ Define your search criteria by the dropdown menues and click **Search**
✓ Click **Reset** to clear the search
✓ Click the **Documents** button on the left to find an uploaded application (green colour = attachment present). *Navigate using the title menus in MyGrant; do not use the browser forward and reverse buttons!*
✓ Click the **Export** tab at the top to export applications to Excel or PDF
✓ Select grant applications by check boxes to the right and click **Excel (selected)** or **PDF (selected)**

➢ **Evaluate the application success**

✓ Select module: **Applications > Application lists**
✓ Click **+New**
✓ Name the list and check the box **On my success rate**s*,* then click **Save**
✓ Select module: **Applications > Grant applications**
✓ Define your search criteria and click **Search**
✓ Select grant applications by check boxes to the right
✓ Select the **Application lists** tab at the top
✓ Click the **Application lists** search field and add one or more Application lists
✓ Click **Add selected applications to list(s)**
✓ Select module: **Applications > Success rates**
✓ Select application lists by check boxes and click **Update**
✓ Success rates are shown in four charts: Sucess Per Applicant, Success Per Funding Agency, Success Per Funding Agency Type and Success Per Year
✓ Uncheck the **Base charts on amounts** box and click **Update** to see number of Applications/Grants in stead of amounts
✓ Uncheck the **Exclude pending applications** check box and click **Update** to excude your pending applications from the success rates
✓ Click **PDF report** to export charts to PDF

GRANTS & BUDGETS
Module: Grant management

➤ **Grant portfolio – all information in one**
- ✓ Select module: **Grant management > Grants**
- ✓ Define your search criteria by the dropdown menues and click **Search**
- ✓ Click **Reset** to clear the search
- ✓ Click the **Details** button on the left to get an overview of a specific grant. *Navigate using the title menus in MyGrant; do not use the browser forward and reverse buttons!*
- ✓ Click the **Documents** button on the left to find uploaded documents (green colour = attachment present). Notice that Grant applications may be uploaded in **Documents** in **Applications > Grant applications.** *Navigate using the title menus in MyGrant; do not use the browser forward and reverse buttons!*
- ✓ Click the **Export** tab at the top and click **Excel (all)** or **PDF (all)** to export grants to Excel or PDF

➤ **Overview of active budgets**
- ✓ Select module: **Grant management > Budget overview**
- ✓ Define your search criteria by the dropdown menues and click **Search**
- ✓ Click **Reset** to clear the search
- ✓ Click the **Export** tab at the top and click **Excel (all)** or **PDF (all)** to export budgets to Excel or PDF

➤ **Employee budgets specified per month**
- ✓ Select module: **Grant management > Payroll budgets**
- ✓ Define your search criteria by the dropdown menues and click **Search**
- ✓ Click **Reset** to clear the search
- ✓ Click the **Export** tab at the top and click **Excel (all)** or **PDF (all)** to export payroll budgets to Excel or PDF

RESOURCES & ALLOCATIONS
Modules: Grant management and Organisations

➤ Overview of employments (with shortcut to allocations)
- ✓ Select module: **Organisations > Employments**
- ✓ Define your search criteria by the dropdown menues and click **Search**
- ✓ Click **Reset** to clear the search
- ✓ Click the **Documents** button to the left to find uploaded documents (green colour = attachment present). *Navigate using the title menus in MyGrant; do not use the browser forward and reverse buttons!*
- ✓ Click the **Resource allocations** button to get an overview of allocations for a specific employment (green colour = allocation present). *Navigate using the title menus in MyGrant; do not use the browser forward and reverse buttons!*
- ✓ Click the **Export** tab at the top and click **Excel (all)** or **PDF (all)** if you want to export to Excel or PDF

➤ Search for allocations to grants or employees
- ✓ Select module: **Grant management > Resource allocations**
- ✓ Define your search criteria by the dropdown menues and click **Search**
- ✓ Click **Reset** to clear the search
- ✓ Click the **Export** tab at the top and click **Excel (all)** or **PDF (all)** if you want to export to Excel or PDF

➤ Available resources
- ✓ Select module: **Grant management > Available resources**
- ✓ Define your search criteria by the dropdown menues and click **Search**
- ✓ Click **Reset** to clear the search
- ✓ Click the **Export** tab at the top and click **Excel (all)** or **PDF (all)** if you want to export to Excel or PDF

EXPENSES & AVAILABLE FUNDS
Module: Accounting

➤ Expense tracking – ongoing budget control
- ✓ Select module: **Accounting > Expense tracking**
- ✓ Define your search criteria by the dropdown menues and click **Search**
- ✓ Click **Reset** to clear the search
- ✓ Click the **Export** tab at the top and click **Excel (all)** or **PDF (all)** to export grants to Excel or PDF

➤ Available funds – planning of project costs
- ✓ Select module: **Accounting > Available funds**
- ✓ Define your search criteria by the dropdown menues and click **Search**
- ✓ Click **Reset** to clear the search
- ✓ Click the **View options** tab at the top to add or remove specific expense types and click **Save**)
- ✓ Click the **Export** tab at the top and click **Excel (all)** or **PDF (all)** to export payroll budgets to Excel or PDF

➤ Employee accounting specified per month
- ✓ Select module: **Accounting > Payroll budgets**
- ✓ Define your search criteria by the dropdown menues and click **Search**
- ✓ Click **Reset** to clear the search
- ✓ Click the **Export** tab at the top and click **Excel (all)** or **PDF (all)** to export payroll budgets to Excel or PDF

DEADLINES
Module: Timely

➢ **Deadline overview – be on time**

✓ Select module: **Timely > Deadlines**
✓ Define your search criteria by the dropdown menues and click **Search**
✓ Click **Reset** to clear the search
✓ Click the **Export** tab at the top and click **Excel (all)** or **PDF (all)** to export grants to Excel or PDF
✓ Red colour = Deadline has been exceeded
✓ Yellow colour = Notification date has been reached
✓ Green colour = Notification date has not been reached yet

➢ **Deadline management – handle a deadline**

✓ Select module: **Timely > Deadlines**
✓ Define your search criteria by the dropdown menues and click **Search**
✓ Click **Reset** to clear the search
✓ Select deadlines to be handled by check boxes to the right
✓ Click the **Change handled status** button on the left to handle a deadline
✓ All handled deadlines are removed from the list
✓ To restore a handled deadline use the **Marked handled** dropdown menu in the search area
✓ Choose *Yes* to see all handled deadlines
✓ Select deadlines to be unhandled by check boxes to the right
✓ Click the **Change handled status** button on the left to unhandle a deadline and the deadline will be shown as unhandled in the list again