

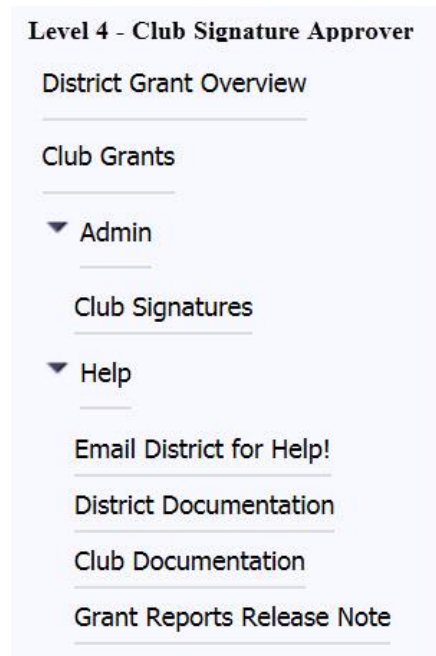
## 2 Overview of Club Grant Processes

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

Once you click on the Grant tab you will see a menu on the left side of the screen based on your security level 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 that has signature approval.

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. Also, top section indicates any Grant Module Updates
- 2) Club Grants– List of all club projects in various statuses where actions can be done along with activities related to the following buttons:
  - a. 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 Club Grant Request-Click Here to Create Grant button – Ability to add a new grant request for DDF funds for the organization year you are in.
- 3) Admin
  - a. Club Signature Restrictions – Ability to indicate what users have permission to sign Grant projects at the Club level
- 4) Help
  - a. Email District for Help! – Ability to send an email to District Administrators for assistance.
  - b. District Documentation – User manual of activities done by the District
  - c. Club Documentation – User manual of activities done by a Club
  - d. Grant Reports Release Note – Release notes of the latest Grant Module changes

### 3 Quick Summary

This section has a quick summary of steps of a Grant from start to finish for a normal grant with a Final Report. Please note there are other activities that are done as well (refer to Overview of Grant Process section) that aren't mentioned as this refers to the new grant processes.

#### Regular Process (No issues) with Only Final Report Done:

It is assumed you have signed into DACdb, have the proper authorities and clicked Club or District Grants for the Org Year to start this process. Please note that hyperlinks to the detailed processes are shown in the comments column for only Club activities.

Step	Club	District	Comments
1	Click New Grant Request-Club's Click Here to Create Grant Button		Grants Details Screen will display with 3 tabs (Details, Contacts and Application) <a href="#">Link to Start of New Grant</a>
2	Complete New Grant Tabs & Click Save Button		<b>Status:</b> Draft (1) 3 new tabs (Budget, Documents and Activity) after you click on the save button <a href="#">Link to Start of New Grant Details</a> <a href="#">Link to Details Tab</a> <a href="#">Link to Contacts Tab</a> <a href="#">Link to Application Tab</a>
3	Click Budget Tab to Review/Change Budget details		Budget details will appear on the left side with graphics on Budget on the right side. <a href="#">Link to Start of New Grant Budget</a>
4	If changes required, do any of the following: <ul style="list-style-type: none"> <li>• Edit an Item by clicking Edit icon next to the Item name</li> <li>• Add a new Item by clicking on one of the following: <ul style="list-style-type: none"> <li>○ Add Income Source</li> <li>○ Add Expense</li> </ul> </li> <li>• Remove an item by clicking the X icon next to the item name</li> </ul>		Edit Item screen will appear <a href="#">Link to Start of Budget Changes</a>
5	Complete Information on screen and click		Budget screen will appear with your changes

Step	Club	District	Comments
	one of the following buttons: <ul style="list-style-type: none"> <li>• Save if you are editing an item</li> <li>• Add if you are adding a new item</li> </ul>		Same as last link
6	If you need to make additional budget changes, repeat steps 4 and 5		
7	Click Documents Tab to Review/Load documents		System will automatically add a html doc of information from the Application Tab <a href="#">Link to Start of Document Changes</a>
8	If changes required, do any of the following: <ul style="list-style-type: none"> <li>• Click Add Folder button to place files</li> <li>• Upload File for supporting files</li> </ul>		Link (same as last)
9	Complete information on the screen and click one of the following buttons: <ul style="list-style-type: none"> <li>• Add Folder if you are adding a folder</li> <li>• Upload File for adding a document</li> </ul>		Link (same as last)
10	If you need to make additional document changes, repeat step 8-9		
11	To start the Club Signature approvals of your grant, Click Club: Collect Signatures Button		<b>Status:</b> Submitted Grant for Club Approval (2) <a href="#">Link to Submitted for Approval Process (Club)</a>
12	Confirm Message will appear & Click OK button		Message to confirm action to send for Club signatures. Signatures tab will appear. Link (same as last)
<b>Club Signature Approval Processes for Grant - Steps 13 - 15 are repeated for Each Required Signature</b>			
13	Review Grant for Approval by clicking on the Edit Icon for the grant you want		<a href="#">Link to Start of Signature Approvals</a>
14	Click Club: Sign Grant Application Button		Grant Signatures screen will appear with signatures already received Link (same as last)
15	Click Sign Grant Button		Link (same as last)
16	If you are the last required club signature, Click Submit Grant for District Approval Button		<b>Status:</b> Submitted Grant for District Approval (3). 2 new tabs Interim Report and Final Report Link (same as last)

Step	Club	District	Comments
<b>End of Club Signature Approval Processes for Grant</b>			
<b>Please note that from this point the Club can still do Budget and Document activities mentioned above</b>			
<b>District Signature Approval Processes for Grant - Steps 17 - 19 are Repeated for Required Signature</b>			
17		Review Grant for Approval by clicking on the Edit Icon for the grant you want	The Edit Grant screen will appear with tabs that provides information for your review.
18		Click District-Sign Grant Button	Grant Signatures screen will appear showing signatures already received
19		Click Sign Grant Button	
20		If you are the last required district signature, Click District-Approval Grant Button	<b>Status:</b> Approved Grant (6)
<b>End of District Signature Approval Processes for Grant</b>			
21	If the Final Report process starts, Review Budget and Documents tab to confirm all the requirements are met.		<a href="#">Link to Final Report Start</a>
22	Click Final Report Tab		The Final Report screen will appear Link (same as last)
23	Complete Project Description for areas 2, 4, 5 & 6		Other areas are automatically populated: 1- from Details Tab (Project Description and 3- from Application Tab (Humanitarian Efforts) Link (same as last)
24	Click Save Final Report Button, Message will appear indicating this report can be found in the Documents tab & Click OK		Link (same as last)
25	Review the Final Report saved in the Documents tab		This report will show you what approvers will see so everything should be up to date and available to them in that document Link (same as last)
26	Click Club: Collect FINAL Signatures Button		<b>Status:</b> Submitted Final Report for Club Signatures (10) Link (same as last)

Step	Club	District	Comments
<b>Club Signature Approval Processes for Final Report - Steps 27 - 29 are Repeated for Each Required Signature</b>			
27	Review Final Report for approval via Edit Grant		The Final Report is in the Documents Tab. This review is to confirm that all information meets District requirements <a href="#">Link to Final Report Club Signature Approvals</a>
28	Click Club: Sign Final Report Button		Link (same as last)
29	Grant Signatures screen showing signatures received. Click Sign Grant Button		Link (same as last)
30	If you are the last required club signature, Click Submit Final Report Button		<b>Status:</b> Submitted Final Report for District Approval (11) Link (same as last)
<b>End of Club Signature Approval Process for Final Report</b>			
<b>District Signature Approval Processes for Final Report - Steps 31 - 33 are Repeated for Each Required Signature</b>			
31		Review Final Report for approval via Edit Grant	Edit Grant screen will appear. The Final Report is in the Documents Tab.
32		Click District: Sign Final Report Button	
33		Grant Signatures screen will appear showing signatures received. Click Sign Grant Button	
34		If you are the last required district signature, Click Approve Final Report Button	<b>Status:</b> Final Report Approved (12) Edit Grant Screen with updates at top
<b>End of District Signature Approval Process for Final Report</b>			
35		Request information to fund grant	Check for club on final District funding (DDF)
36		Clicked District Grants	
37		Click on \$ (Fund) icon for Grant you want to fund	Fund Grant screen will appear
38		Enter Check No, Funding Notes & Click Fund Grant Button	Check # appears in Activity Log
40		If the Project Close process is ready to occur, Click Close Project Button	<b>Status:</b> Project Completed (13) End of Grant processes