GrantVantage

GRANT, CONTRACT, BUDGET & SUB-RECIPIENT MANAGEMENT

GrantVantage offers an easy-to-use cloud-based grant management solution built on the Microsoft Dynamics 365 platform. The solution enables users to easily manage all funder contributions, grant compliance issues, and sub-recipient activities. Ensure your organization or agency stays ahead of the rapidly changing regulatory landscape with this powerful solution.

OBJECTIVE MANAGEMENT
Set performance measures, then track and report on the progress of your objectives throughout the life of your grant.

ACTIVITY & SUB-ACTIVITY MANAGEMENT
Assign grant activities and related sub-activities to members of your project team. Track and report on progress in real-time.

CONTRACT MANAGEMENT
Initiate, execute, manage, and close contracts. Manage contract objectives, activities, budgets, performance measures and payment disbursements. Implement standardized language to ensure fast and consistent contract execution.

BUDGETING
View interactive budgets for every year of your project. Create "budget revisions" and "budget carryovers" when adjustments are required. Post transactions against the budget as they occur. Interface the GrantVantage budgeting module with most accounting software.

SUB-RECIPIENT MANAGEMENT
Easily add sub-recipients / sub-awards to your grant, incorporate sub-award budgets, and monitor objectives, activities and performance measures at every level of your grant.

INTEGRATION WITH OUTLOOK
GrantVantage is integrated into Microsoft Outlook, giving users access to all grant management functionality in the application they know best.

DOCUMENT MANAGEMENT
Associate all important documents, emails and media with your grants, ensuring a complete audit trail of all revisions and versions.

CLOSE-OUT & ARCHIVING OF GRANTS
Move a grant from "Active" to "Close-out" to "Archived" and keep a record of all historical documents, including reports, email and media pertaining to each grant.

FUNDER ALLOCATION AND REPORTING
For multi-funder projects identify each funders contribution. Report by funder, program, budget category & objective.

TIME AND EFFORT REPORTING
Maintain compliance with federal requirements for employee time reporting on all grant-related activities. Ensure that time allocations match what you've promised to your Funders.

AUDIT TRAIL
GrantVantage keeps a record of all grant modifications including the user who made the change and the date, enabling complete accountability throughout the grant life-cycle.

INVENTORY MANAGEMENT
Keep track of all equipment purchases made with grant funds, know where each item is at all times, and easily reconcile outstanding equipment.

STANDARDIZED REPORTING
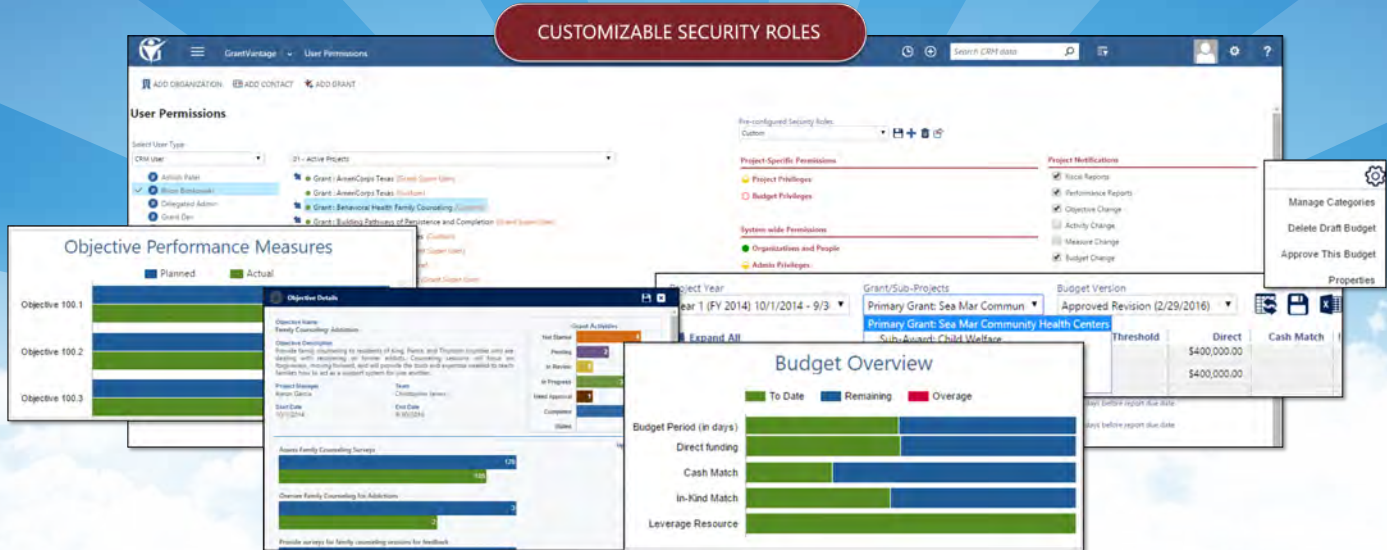GrantVantage's library of standardized reports enables you to quickly produce all funder-required reports.

CALL 888-381-9734 FOR MORE INFORMATION!

EASY ⌄ POWERFUL ⌄ COMPLETE

CUSTOMIZABLE SECURITY ROLES

INTERACTIVE DASHBOARDS GIVE YOU COMPLETE CONTROL OVER YOUR GRANT & CONTRACT

Get complete and instant visibility into the status of your grant and contract objectives including all related activities and performance measures. Our interactive dashboards let you update information on the fly.

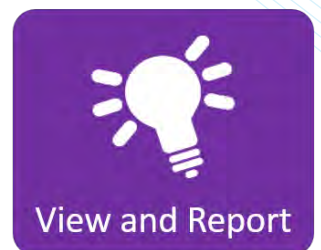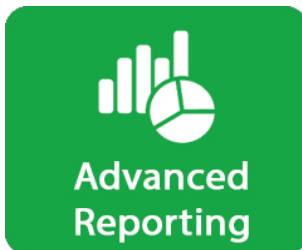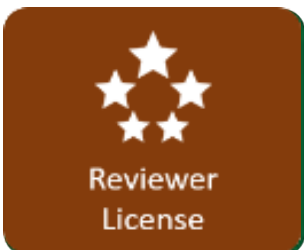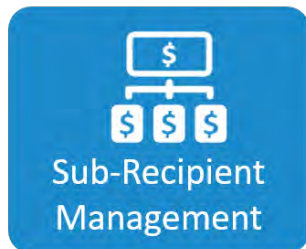**ADVANCED BUDGETING DESIGNED EXCLUSIVELY FOR GRANT & CONTRACT MANAGEMENT**

Manage your grant and contract budget like never before – assign which users can modify and approve budgets, drill down into any budget item to see transactions posted against it, add new transactions as they occur, and receive automatic notifications when approaching budget limits.

GrantVantage Base Module

- Microsoft Dynamics CRM
- Multi-User Cloud-based Solution
- Interactive Dashboards
- Grant Objective Management
- Performance Measure Management
- Budget Management
- Standardized Reporting
- Integration with Microsoft Outlook
- Document Management
- Close-out and Archiving of Grants

Add-On Modules

- Funder Portal
- Sub-Recipient Management
- Drawdowns & Reimbursements
- Financial Import
- Reviewer License
- Multi-Funder Projects
- Advanced Reporting
- View and Report

GrantVantage Base Module
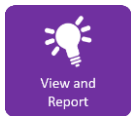
GrantVantage Base Module

The GrantVantage solution is built on the Microsoft Dynamics 365 platform. The base module enables complete grant management functionality, including grant objective oversight and management, performance measure management, grant activity management, grant budgeting, standardized grant reporting, budget versus actual reporting, complete grant auditability, and native integration with Microsoft Outlook. Pricing for the base module is per user per month. The base module includes:

Seamless Integration with Microsoft Office 365 (Email, Task, Calendar)	Cloud-Based Solution Hosted by Microsoft (Azure)
Seamless Integration with Microsoft SharePoint (with MS License)	Microsoft CRM: Track Funders, Organizations & Contacts
Seamless Integration with DocuSign (with DocuSign License)	Assign & Track Tasks & Activities by Person/Team Responsible
Access System using MS Outlook or via Secure Custom URL	Budget: Track Direct Funds, Cash Match, In-Kind & Leveraged Resources
Customizable User Permissions	Budget: Prepare Budget Revisions & Carryover Drafts With Revision Archive
Create & manage unlimited primary grants and partner agreements	Budget: Track IDC & Funder Budget Change Tolerance
Visual dashboards: Budget, Objectives, Activities & Performance Measures	Budget: Track Program Income & Related Expenditures
Manage and Update Objectives, Activities & Performance Measures	Budget: Track Inventory
Document & Media Repository - All File Types (Notes & Attachments)	Reporting: Financial transactions. Budgeted vs actual - export to Excel
Agreement Editor / Template Creator	Primary Grant Close-out & Archive
Create, Manage & Cross Reference Contacts & Organizations	Monthly User Webinars
Create New Grants and/or Projects	Online Self-Help Desk with Videos, FAQ, Ticketing System
Alert & Approval notifications for reports, change requests & communication	Collaborate with internal & external Team Users

GrantVantage Modules

View and Report
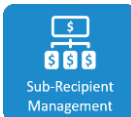
For users who are not involved in the day-to-day management of grant activities but who are responsible for portfolio oversight. The View and Report module offers users access, based on user permissions, to all budget, performance and activity detail information. This includes access to the GrantVantage interactive dashboard for a real-time view into grant performance. Use this module to keep your board of directors, councils, committees, and senior managers informed of progress. Max number of users under a single module is 10 users. There is an annual price for this module.

Multi-Funder Projects

Manage multi-funder or program source allocations grant projects or programs where there are multiple sources of funding used to deliver services or accomplish program objectives. As part of the GrantVantage budgeting process, each funder amount is allocated and tracked against expenditures and objectives. Every expense transaction is allocated to the appropriate funder and objective, thereby enabling funder-specific reporting for each grant project or program. There is an annual price for this module.
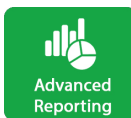
Sub-Recipient Management

The sub-recipient management module provides an infinitely flexible hierarchy of grant or project management, enabling users to manage funds, objectives, performance measures, activities and data at multiple levels. Share performance and financial requirements with sub-recipients, contractors, program offices, divisions, departments or any other tier in your organizational hierarchy. Get a top-down view of all activity at any level using the GrantVantage interactive dashboards. There is an annual price for this module.
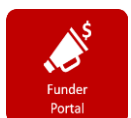
Financial Import

The financial Import module enables users to (1) import Excel reports from your financial system, or (2) export grant related transactions from your financial system directly into GrantVantage. This module enables users to create rules for posting imported transactions into the appropriate grant and budget category. The Import module can also be used to push summary or detail updates of existing transactions into the GrantVantage system. There is an annual price for this module.
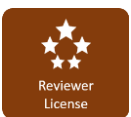
Drawdowns & Reimbursements

The Drawdown, Reimbursement, and Disbursement module enables complete management of all payments coming into and going out of your project, including reimbursement invoicing, scheduled drawdowns, and disbursements to sub-awardees and contractors based on actual project performance. Users can easily generate detailed transaction summaries as supporting documentation. There is an annual price for this module.

Advanced Reporting

Advanced Reporting provides powerful and high performance reporting on any data in the GrantVantage system. Users can build and run aggregate reports on your entire portfolios using visual charts. User have access to advanced dashboards to display financial data, revert fund, global invoice, SEFA & administrative funds. Reports include spending by revenue source, financial overview, match report, CFDA report, spending by GL code and many more.

Funder Portal

GrantVantage offers a complete external portal hosted on the Microsoft cloud. The Funder Portal enables users to easily develop and post grant and contracting opportunities, receive and review applications and proposals, and manage review panels. This module provides funders with flexible templates, communication with applicants, reviewer recruitment and tracking, application and proposal assessment questions, and scoring. This module provide maximum flexibility to manage the entire review and award process. There is an annual price for this module.

Reviewer License

Manage both the panel and individual reviewers. This license is for pre-award activities only. The Reviewer license allows funders to assign applications or contract proposals to internal or external persons to review, score and provide recommendations. This Reviewer module is used with the GrantVantage Funder Portal. There is an annual price for the Review License Module