USER MANUAL FOR GRANT MANAGEMENT APPLICATION
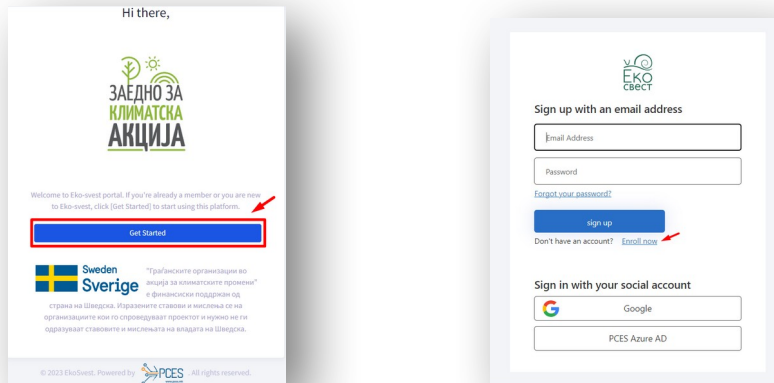
Content table

1. User registration

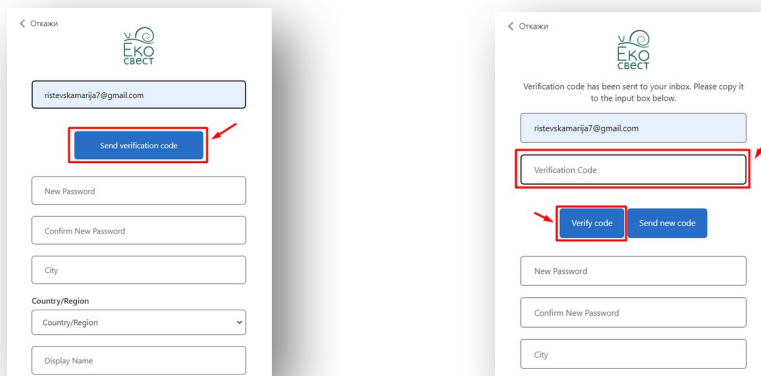## 1.1   Access to the application

Click on the **Get started** button and once the pop-up window opens, click on Enroll now.
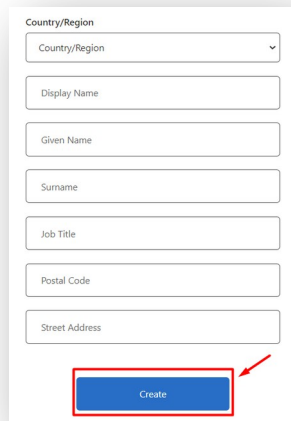

Fill in the necessary data and click on **Send verification code**.
Enter the verification code that will arrive in your email in the field and click **Verify code**.

Fill in your details and click **Create** in order to create the profile.
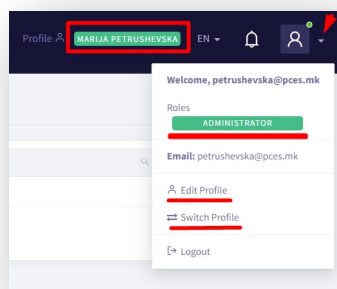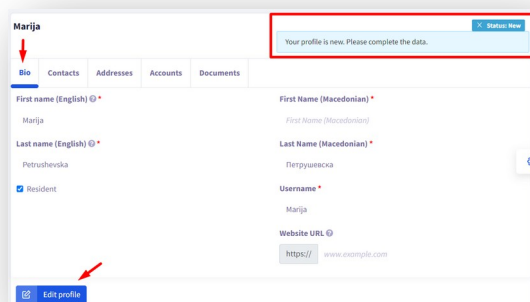
1.2   Edit profile.

In the profile menu, click **Edit Profile**.

Profile status is **New**, data needs to be edited.
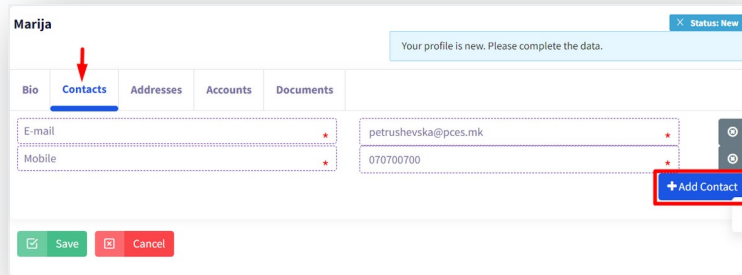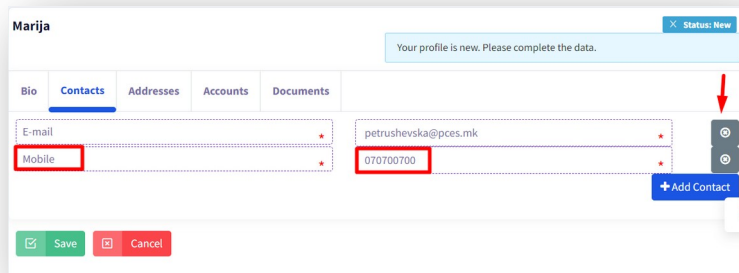

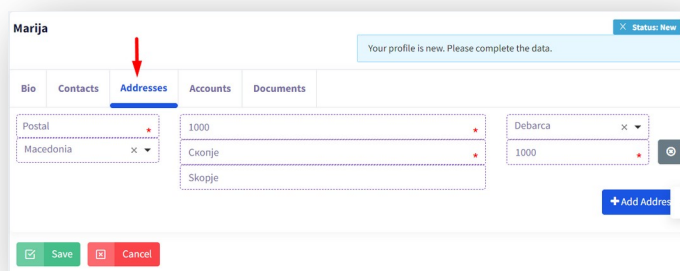Click on **Edit profile** and start filling in the fields.

In the **Contacts** section, select a contact type and enter it in the field to the right.
If you want to leave an additional contact (e.g., mobile number) click on the **Add contact** button and select a contact type again and enter it in the field to the right.
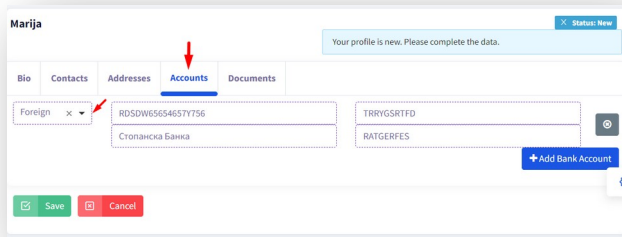

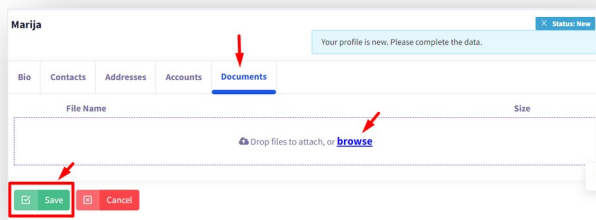You can remove a contact field on the button marked with X.

In the Addresses section, select Postal and State, and in the field to the right, enter the address. Under it, write down the town, and in the field to the right, select the municipality and the postal code.
The possibility to add an additional address or to delete it is also in this part of the profile editing.
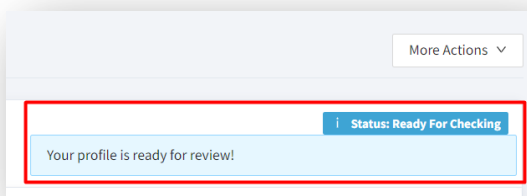

In the **Accounts** section, select the type of account (Domestic or foreign).
Enter the account in the field on the right.
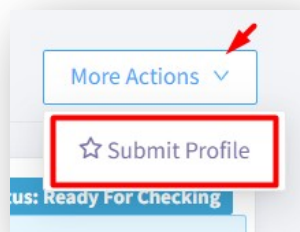Option to add more accounts and delete.

In the **Documents** section, attach the necessary documents.
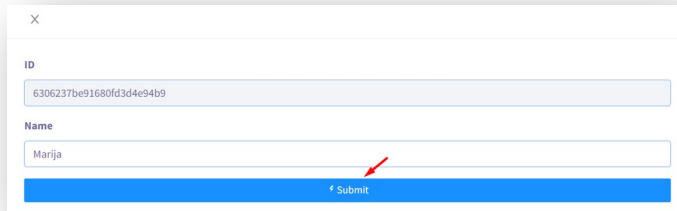Click the **Save** button.

After filling in all the fields, the profile is **Ready for review**.

On the More actions button, Submit Profile.
Submitting a profile is a mandatory step in order to create or access an organization and later apply for calls.
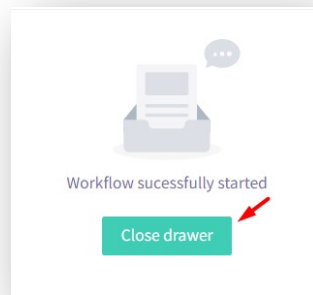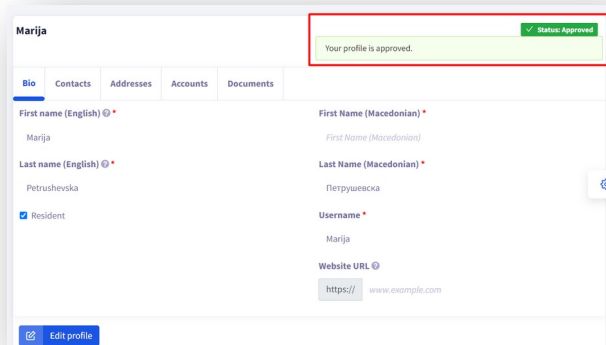

Click the Submit button.

The process has been successfully started. Click the Close drawer button.

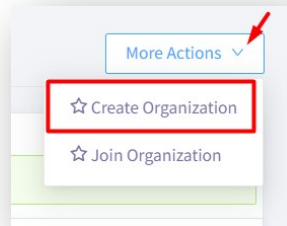Your profile status changes to Approved after the administrator approves your profile.
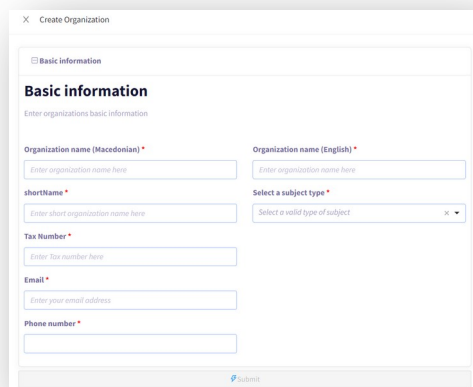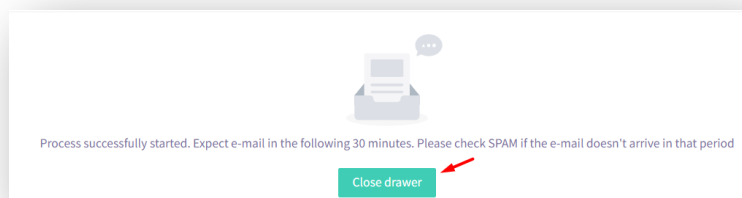
2. Registration of organization

2.1 Creating an organization.

Click the More Actions button and select Create Organization. (Home -> Edit Profile -> More Actions –> Create Organization)
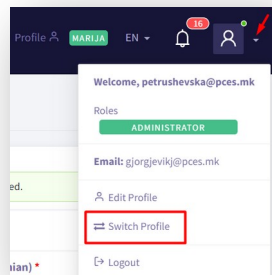

Enter basic information about the organization. **Select a subject type** and click **Submit**.
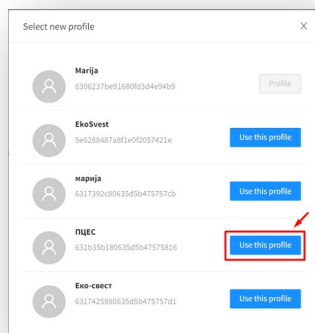

When you receive a confirmation email for registration, the organization you created will appear in the profile section.
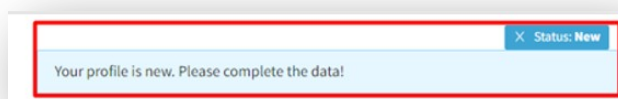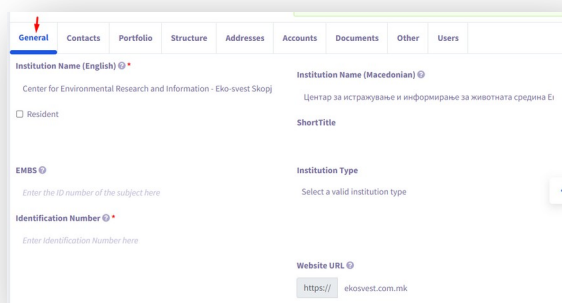To edit your organization's profile, click **Switch Profile**.

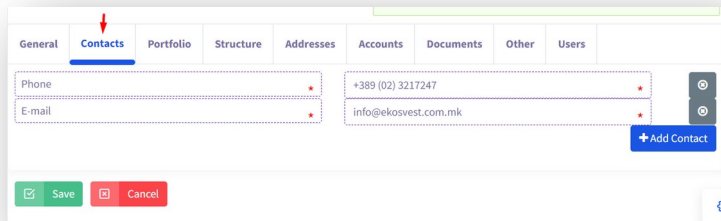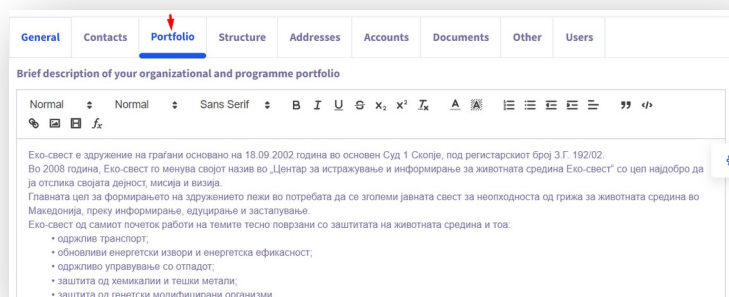Select the new profile you want to update.

2.2 Edit profile

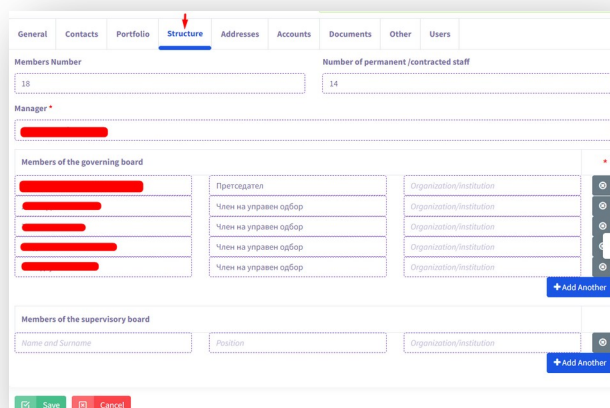Profile status is New, data needs to be updated.

In the Contacts section, select a contact type and enter it in the field to the right.
If you want to leave an additional contact (eg e-mail), click on the Add contact button and select a contact type again and enter it in the field to the right.
You can remove a contact field on the button marked with X.

In the Portfolio section, enter a brief description of your organizational and program portfolio.
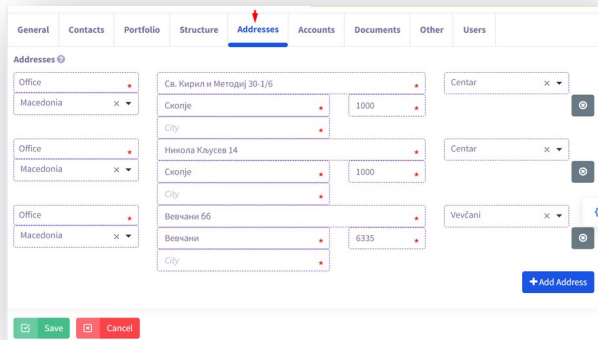

In the Structure section, enter data about the Manager.
Depending on the type of entity, also fill in Members of the management and supervisory board.
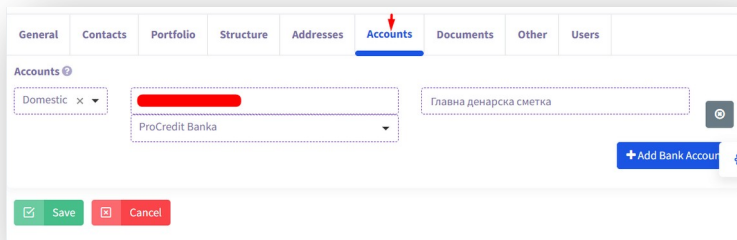
In the Addresses section, select Postal and State, and in the field to the right, enter the address. Under it, write down the town, and in the field to the right, select the municipality and the postal code.
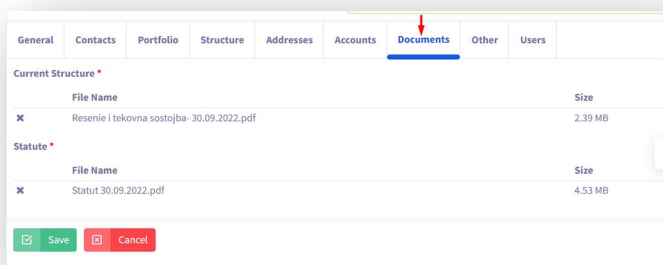
The possibility to add an additional address or to delete it is also in this part of the profile editing.

In the Accounts section, enter the type of account (Domestic or foreign).

Enter the account in the field on the right.

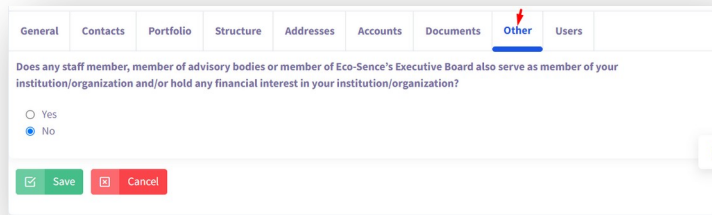Option to add more accounts and delete.

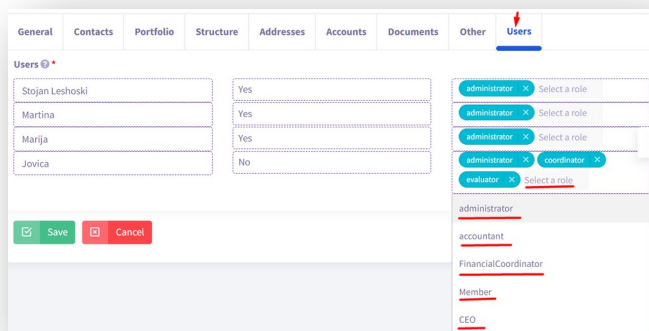In the Documents section, attach the necessary documents.

In the Other section, select Yes or No depending on whether a member of the staff, member of advisory bodies or member of the Executive Board of Eco-Awareness also serves as a member in your institution/organization and/or has any financial interest in your institution/organization.
If the answer is yes, enter the name and surname of that person in the field below.

The Users section contains all members who have accessed the organization. In the field on the right, you can assign a role to the user.
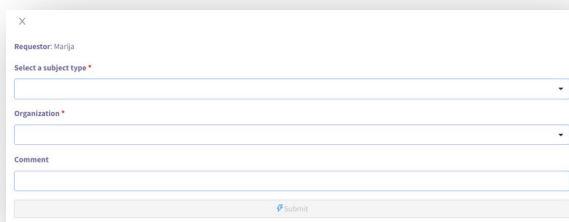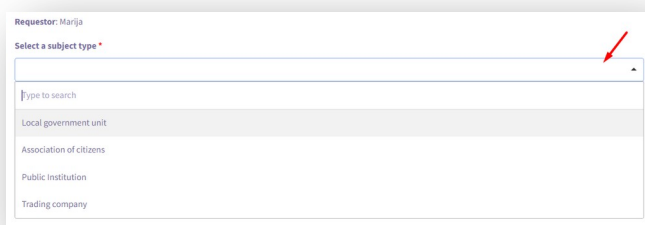

Click the **Save** button.

3.   Join an organization

To join an organization click the **More Actions** button and Join an Organization. (Home -> Edit Profile -> More actions –> Join Organization)
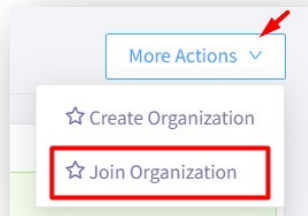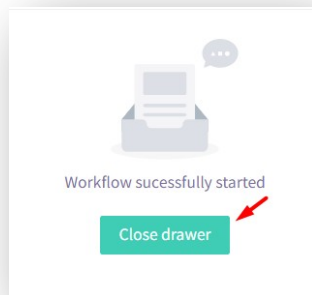
Select a subject type:
1. Local government unit
2. Association of citizens
3. Public institution
4. Trading company

Select the organization you want to join.
Enter a comment if necessary.
Click Submit.

Your request is approved by the account administrator of the organization you are accessing, and assigned a role within it.
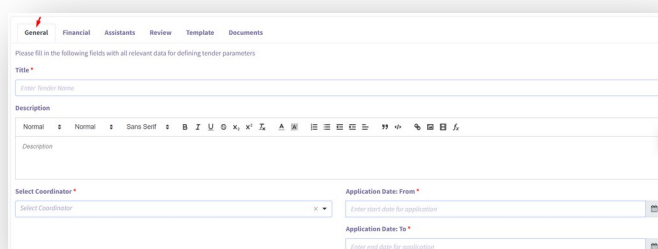
4. Creating Tender

In the **More Actions** menu, click **New Tender**.
(Home -> Options -> Tender definition –> More Action-> New tender)
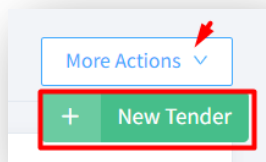
1.1 General information

Write a title of the Tender, a description of the tender, select a coordinator and a date of application.
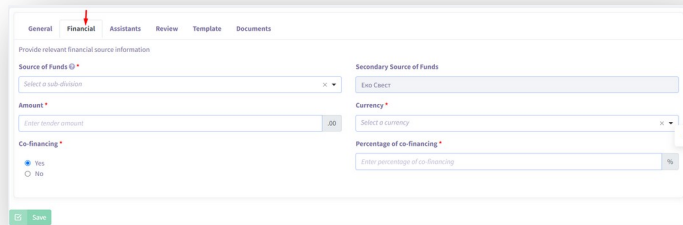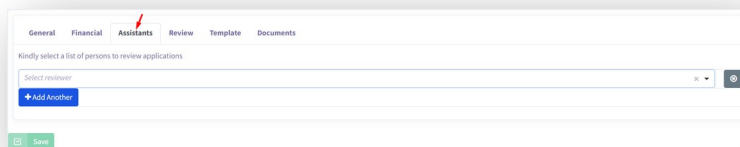
1.2 Financial

Select a primary source of funds, enter an amount, and select a currency.
If the call is co-financed, mark Yes and enter the percentage of co-financing.
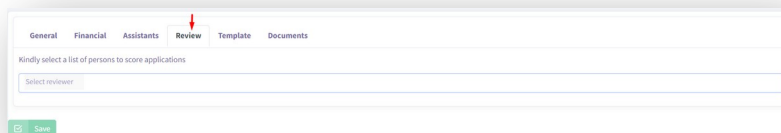

1.3 Assistants

Select the persons who will review the applications and make the preliminary selection of the applications for the call.
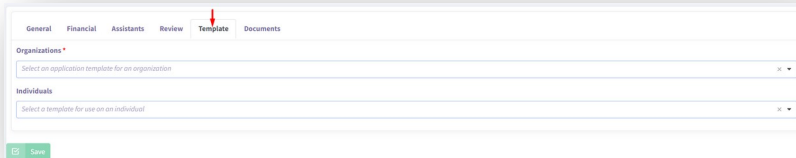
1.4 Review

Select the persons who will evaluate the applications for the Tender (Evaluators).

1.5 Form
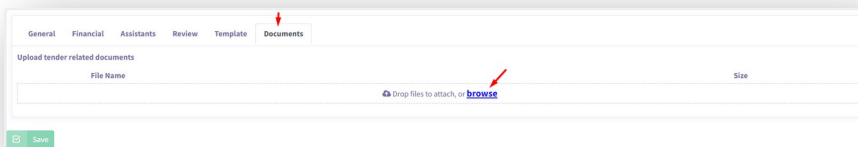
Select a form for organizations, a form for individuals, or both, depending on who the call is about.

1.6 Documents

Attach the supporting documents related to the Tender.
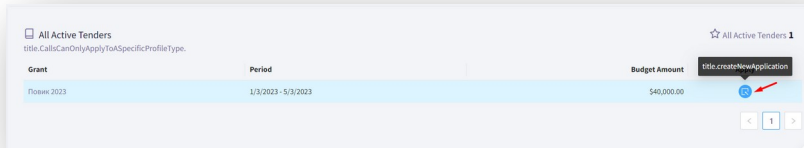
5. Filling up an application

In the Options menu, click Apply For Grant. (Home -> Options -> Apply For Grant)
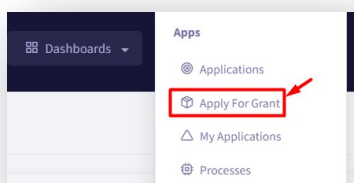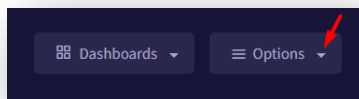
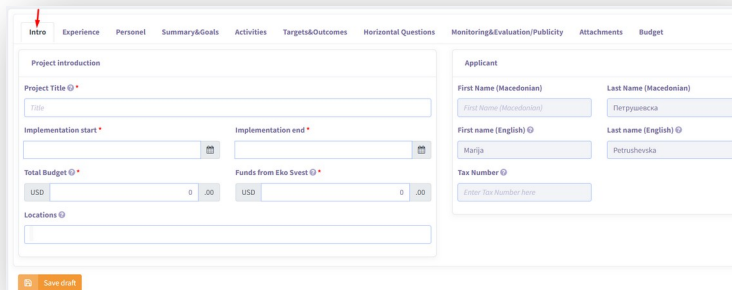In the list, find the Tender you want to log in to apply for click on Create New Application.

Fill in the fields in the Intro section for the project.
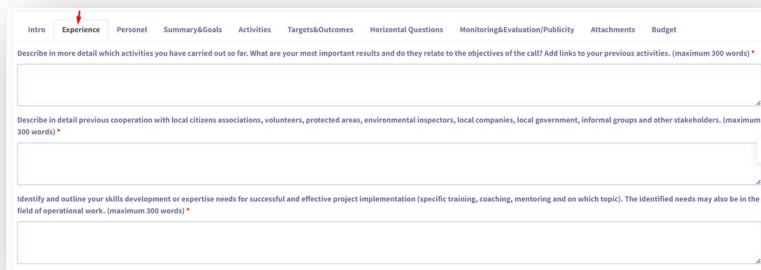
In the Experience tab, complete the three fields according to the requirements listed in front of each field.

In the Personnel tab, enter data for Personnel.
In the CV section, attach short work biographies of the persons who will carry out project activities.

In the Summary and Goals tab, fill in the fields following the directions in the description.

In the Activities tab, fill in the fields as required.
In the Months section, the number 1 represents the first month for the implementation of the project and does not refer to a calendar month.

Targets and Outcomes

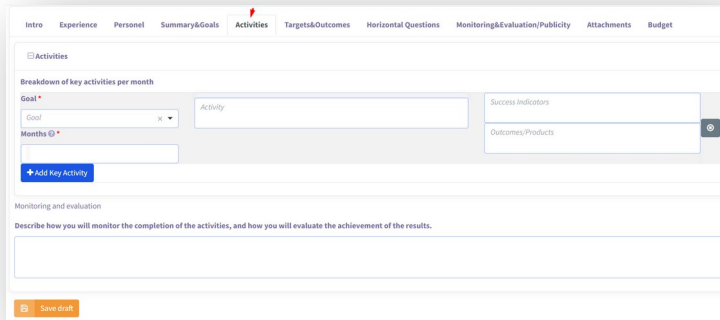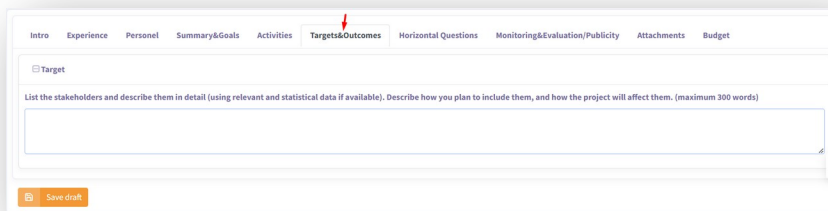## Horizontal issues

Poverty

The development perspective of people's problems means that the situation, needs, and priorities of poor women, conditions, and men should be the starting point for fighting poverty and promoting fair and sustainable development. Sustainable development refers to economic, social and environmental sustainability. For a person living in poverty, this can include productive employment and decent work, access to basic social protection and good quality education, and a non-toxic environment.

Democracy and human rights

Human rights and democracy should be seen as fundamental to human development. The rights perspective derives from 15 globally agreed values, which include the UN Universal Declaration of Human Rights and the human rights conventions adopted subsequently, which are binding in international law. These include four core principles based on the normative human rights framework: non-discrimination, participation, openness and transparency, and responsibility and accountability.
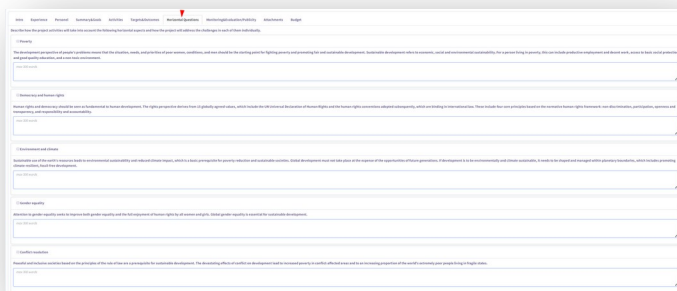
Environment and climate

Sustainable use of the earth's resources leads to environmental sustainability and reduced climate impact, which is a basic prerequisite for poverty reduction and sustainable societies. Global development must not take place at the expense of the opportunities of future generations. If development is to be environmentally and climate sustainable, it needs to be shaped and managed within planetary boundaries, which includes promoting climate-resilient, fossil-free development.

Gender equality

Attention to gender equality seeks to improve both gender equality and the full enjoyment of human rights by all women and girls. Global gender equality is essential for sustainable development.
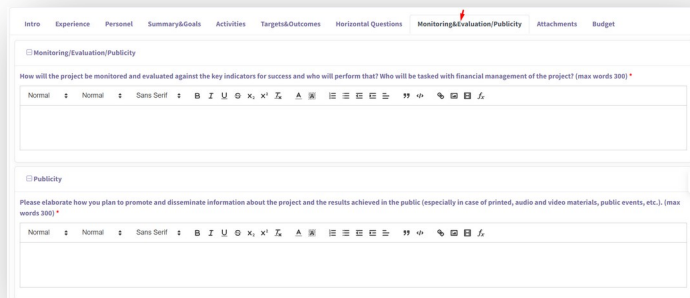
Conflict resolution

Peaceful and inclusive societies based on the principles of the rule of law are a prerequisite for sustainable development. The devastating effects of conflict on development lead to increased poverty in conflict-affected areas and to an increasing proportion of the world's
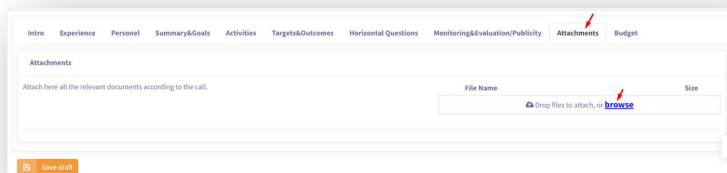extremely poor people living in fragile states.
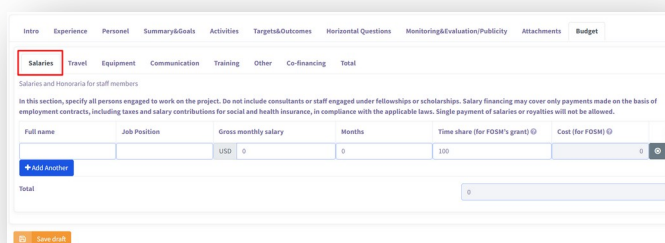
Monitoring/Evaluation/Publicity

In the Attachments tab, attach all relevant documents according to the Tender.

5.1 Budget

Fill in the fields in the Budget section as required.
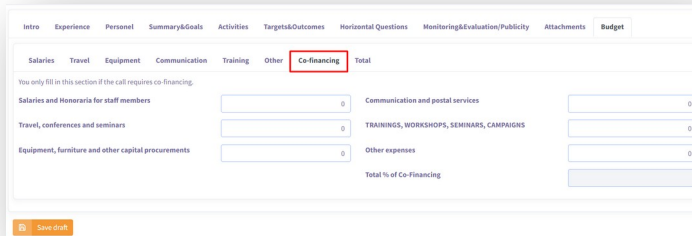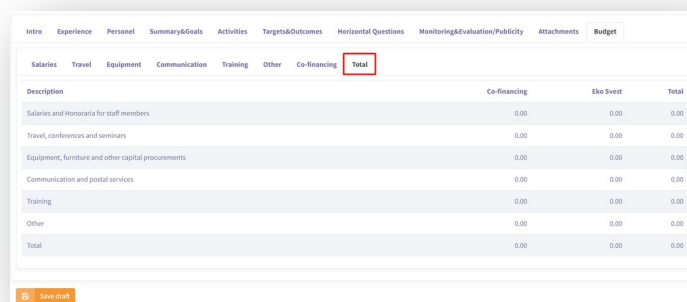
You fill in the Co-financing section only if it is indicated in the Tender.

While you need to make changes to the data entered in the application, press the Save draft button.
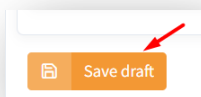
After you have filled in all the mandatory fields in the application, press the Save button and your application is complete.
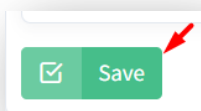
If there is no need to further change the entered data. Click the Submit Application button, and your application will be forwarded for consideration.
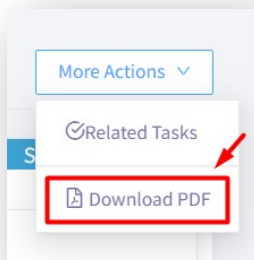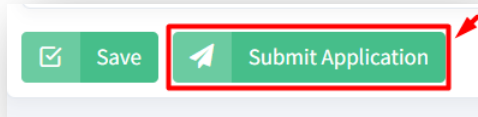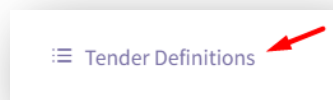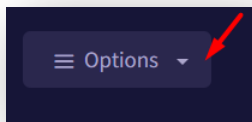

After sending the application, you will receive an email with a notification that it has been submitted.
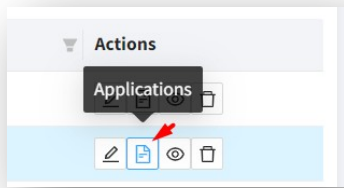
After the application status is changed to Completed, the user can download the application in PDF format. (More actions->Download PDF)

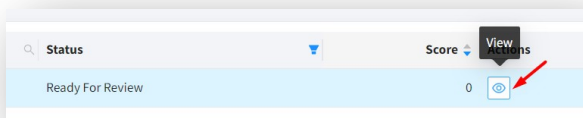# 6. Review of application

In the Options menu, select Tender Definitions.

From the list of tenders, select the tender for which you want to review reports and click on Application.
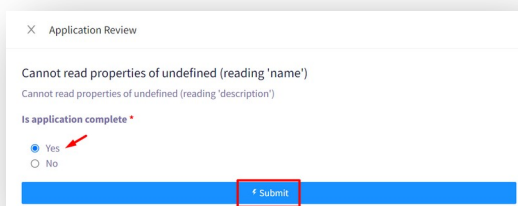
From the list of applications for the specific tender, start reviewing the applications with the Ready for Review status by clicking the View button.

If the reviewed Application meets the criteria to be sent for evaluation, click on More Actions and Application Review.
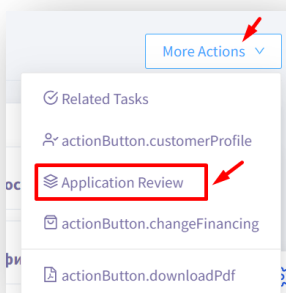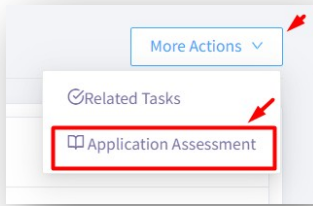

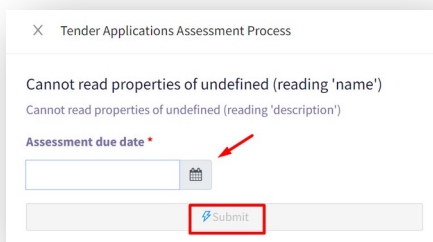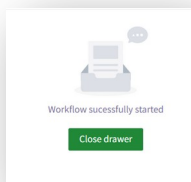In the Application Review section, select Yes and click Submit.

The status of the Application changes to Ready for Evaluation.

From the list of tenders, select the call and in the menu for More actions, click on Application Assessment.
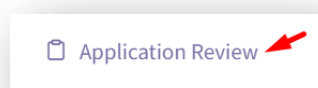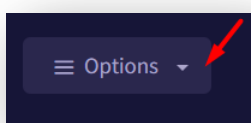
Fill in the date that the assessment is expected to be completed.
Click Submit.

7. Evaluation process

Click on the Options menu, and go to Application Review.

The Application Review section lists all current applications available for evaluation.

By clicking on + you can see which Tender the given Application refers to.

By clicking the View button, you can view the application.

Click the edit button to enter the Score and comment on the selected entry.

After entering the score and comment, save the changes.

Once you have finished evaluating all the applications submitted for the specific tender in the Tasks section click on View.

Only if all applications have been evaluated, press the button Submit.

The status of the application changes to Scored.

7.1 Grade revision

Under More Actions, click Scoaring Review.
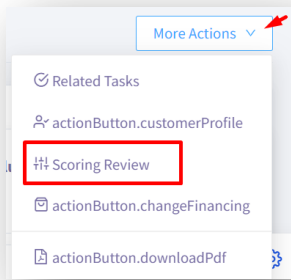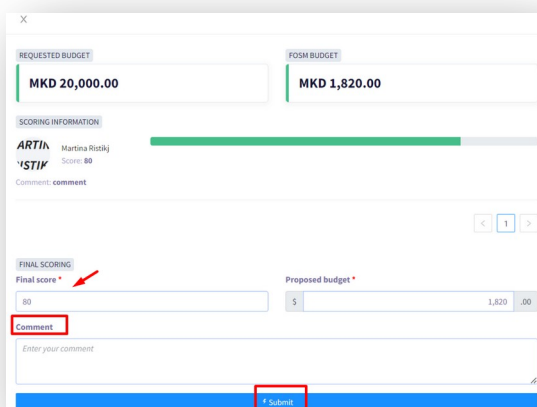
In the grade revision section, all grades and comments from the Evaluators for the specific application are displayed.

In the final scoring, the result obtained as an average of all the displayed evaluations is presented.

The result may be modified in agreement with the tender coordinator and all evaluators.

All important data related to the adopted final assessment of the application are entered in the comment.

When the final scoring is done, click Submit.

Evaluators receive an email to review the final tender scores, and complete the task in the application. (List of all final decisions)

When all evaluators have completed the task, which means that they agree with the final scores, the status of the applications changes to Ready for Approval.

8.   Meetings

8.1 New meeting

In the Options menu, click Meetings.
On the More Actions button, click New Meeting.
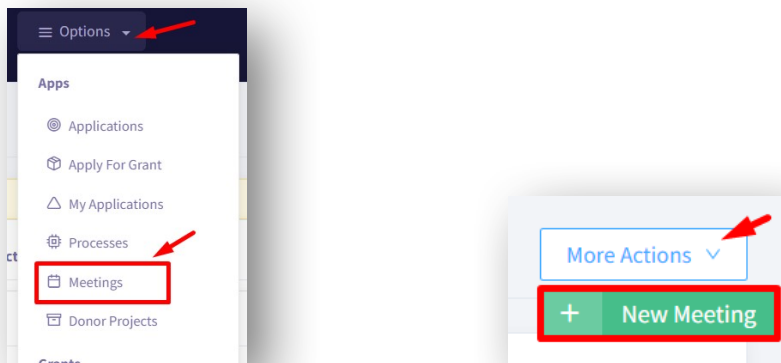
Fill in the required information and click submit.

8.2 Adding an application to a meeting

In the Options menu, click Applications.

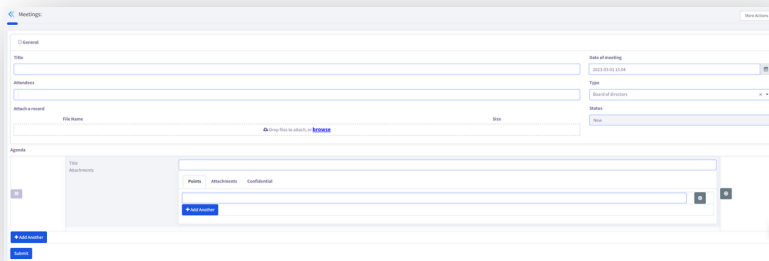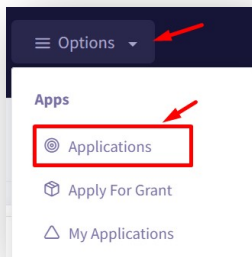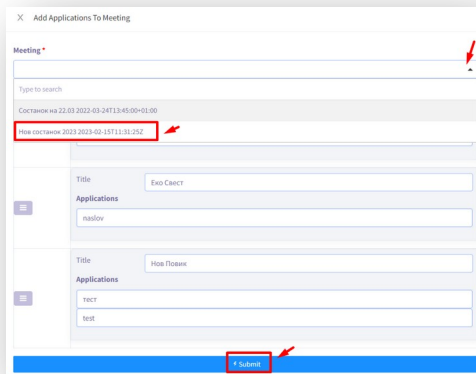Select the applications to be added to the meeting.
You can sort the application by status (Ready for board).
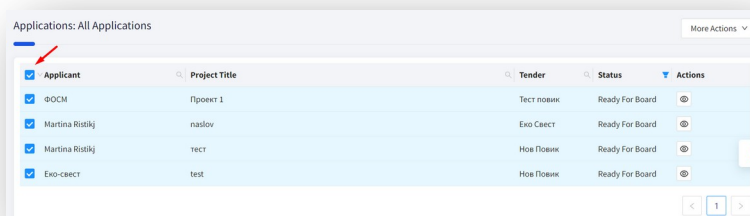
On the More Actions button, click Applications to meeting.
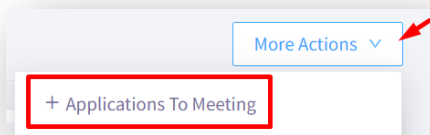
Select the meeting to which the applications should be uploaded.
Click the Submit button.
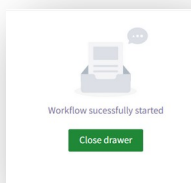
Applications are attached to the meeting.

When the meeting has been created and all the necessary applications have been added, on the More Actions button, click Organize the Meeting.

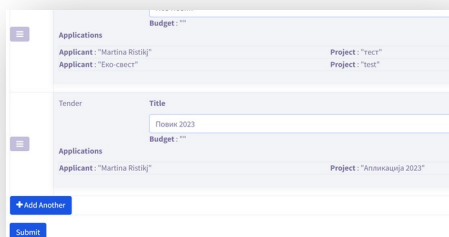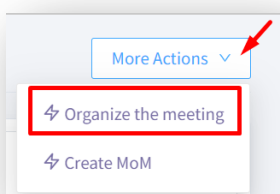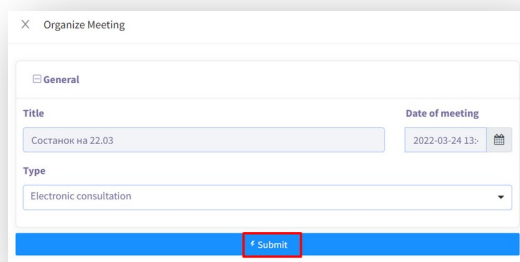In the section on organization of the meeting are the basic data about it. Clicking the Submit button starts a process that moves applications that have been added to the meeting to the Pending Board Decision status.

A word document is created with the meeting agenda.

A message with a link to the agenda of the meeting will be sent to those present at the meeting.

The meeting status changes from New to Scheduled.
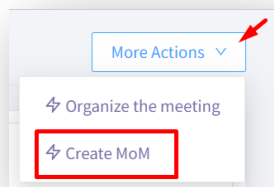

After holding the meeting, on the More Actions button, click Create MoM.
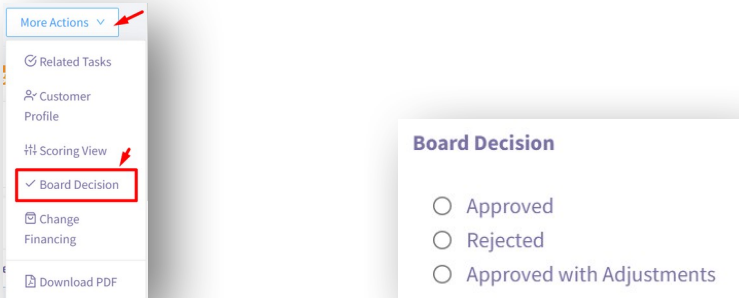
The coordinator receives a task to attach the minutes of the meeting.

After uploading the MoM, the responsible person receives a task to approve the MoM.

9. Board decision

For all applications for which the board has decided that a grant will be awarded at the meeting, the Board Decision process is started.
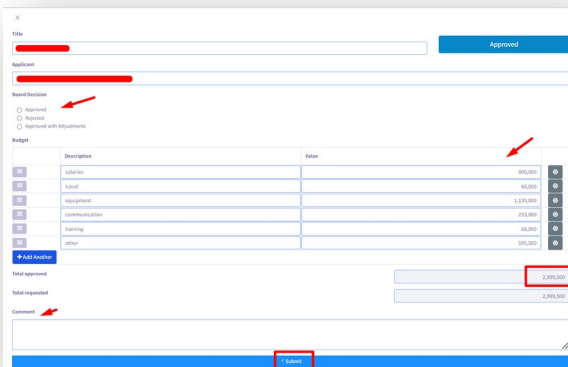On the More Actions button, click Board Decision.

In the board's decision section, you enter the feature for the specific application.
Approved – click the button if no changes are needed to the application and it is approved as originally submitted by the applicant.
Approved application but with the need for some changes in the budget. You enter the changes that the applicant needs to make and press Submit.
Rejected Application – The application is rejected and clicking this button and Submit the application goes to Rejected status.
Approved with changes – The application has been approved with changes in the comments section. You enter an appropriate comment and press Submit.

The applicant receives an email with a notification:
"Your proposed project is undergoing final corrections before signing a contract."

On the profile from which the application for the call was submitted, a task arrives in which there are details about the necessary corrections that should be made before signing the contract.
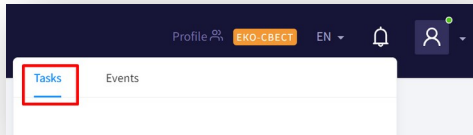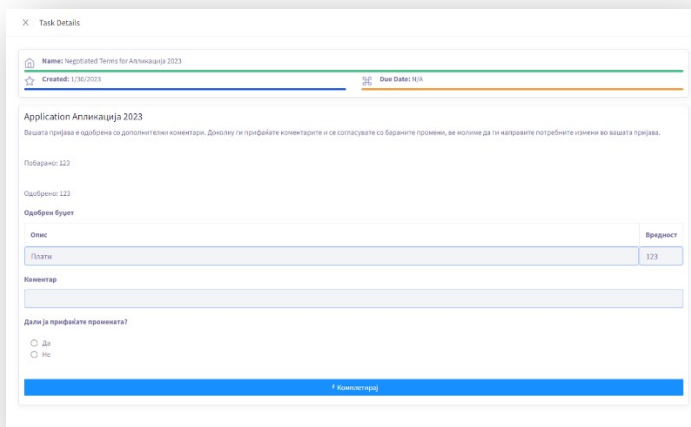

In this section you can see all the changes requested by the call coordinator, which should be implemented in the application.
If you agree to make the requested changes, mark the Yes box and click Complete.
If you do not agree with the requested changes, click No and Complete.
If the change is rejected, the status of the application changes to Rejected.
Note: You make the requested changes, then Complete the task.
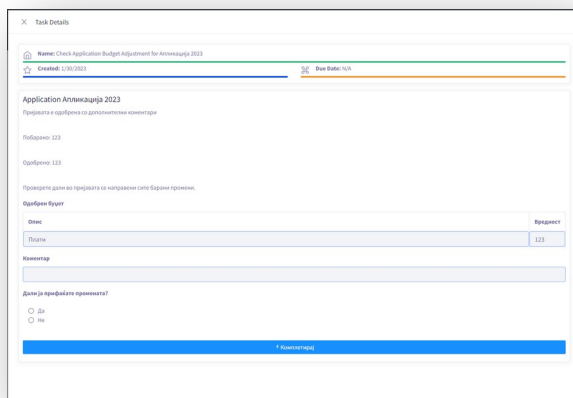
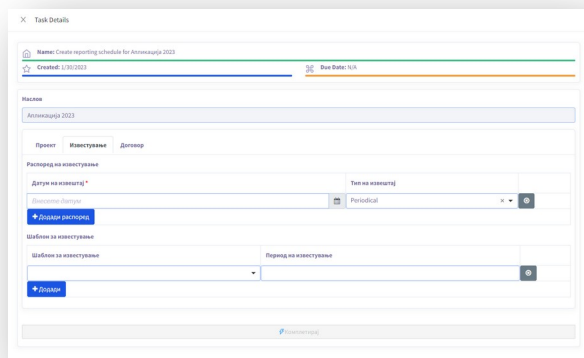If the change is accepted by the applicant, the task reaches the coordinator.
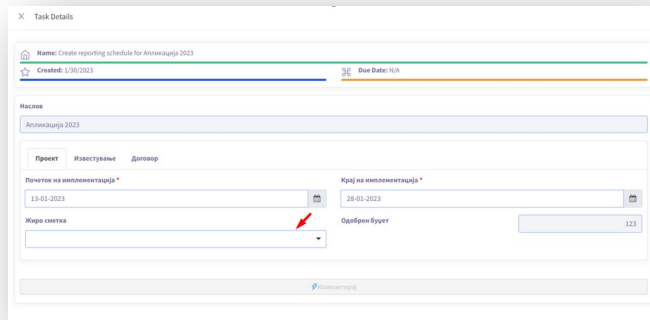
If the coordinator does not accept the change, the status of the application changes to one status back, ie. Approved for adjustment and the previous assignment reaches the applicant again.
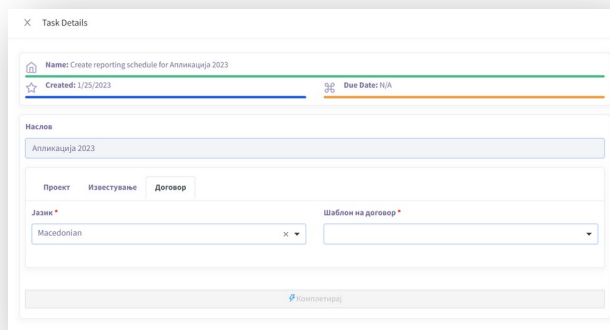
If the requested changes are made, the coordinator clicks Yes and completes the task (accepts the change made), the coordinator is tasked with creating a Reporting Schedule.

In the Project section, select bank account.

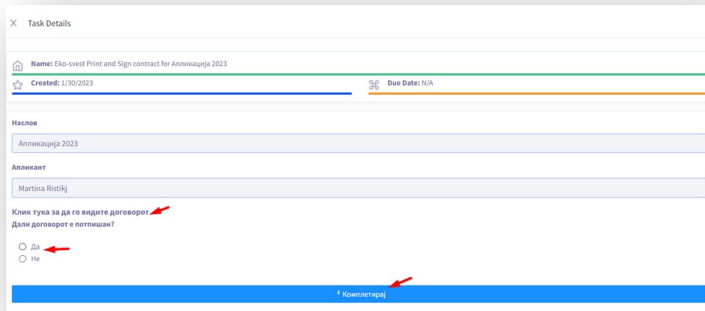Date and report type are entered in the Notification section.

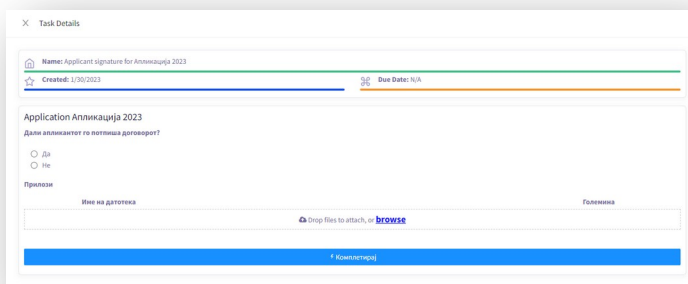In the Contract section, select Language and Contract Template.

By filling in all three sections (project, notification and contract) and clicking the complete button, the coordinator creates a notification schedule.

A task arrives at the coordinator asking whether the Agreement has been signed (by the Board of Directors).
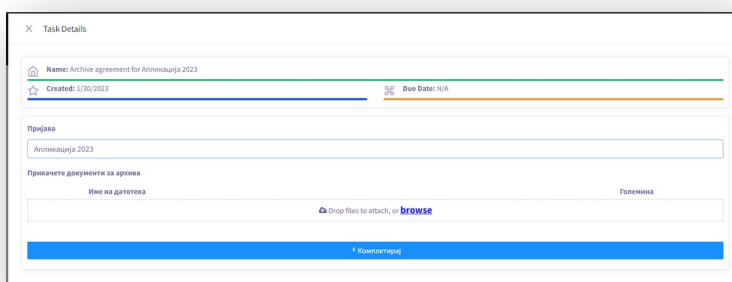
You can open and download the contract here.

If this task is completed, the coordinator receives a task asking if the Agreement has been signed (by the Applicant)

If the applicant has not signed the contract, the status changes to Rejected.

In the last task, the agreement for archiving (signed by both parties) should be attached to the coordinator.

10. Reports

10.1   Reporting

On the Options menu, click My Grants.
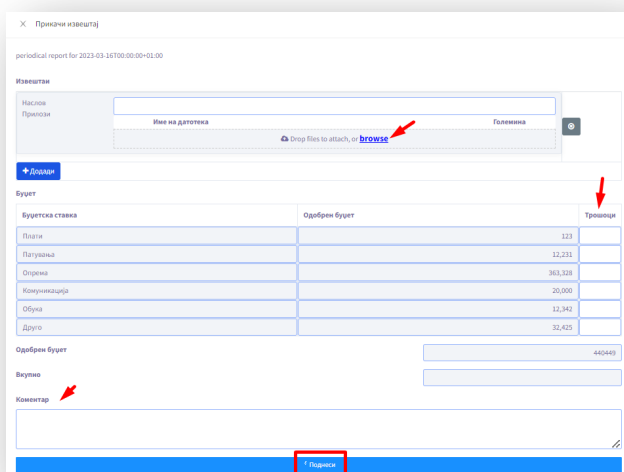

Click the View button.
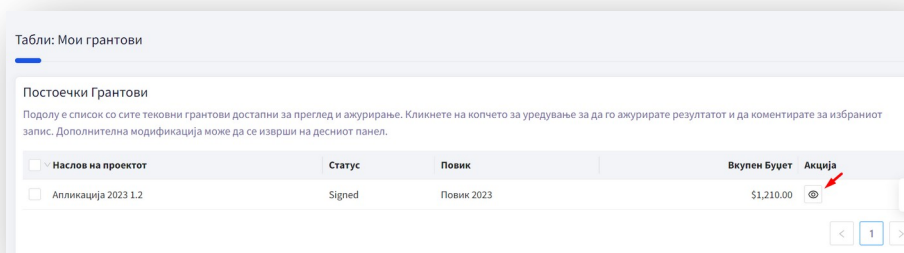
In the Reports section, attach the necessary documents.
Enter the expenses for the period in the Budget.
Write a comment.
Click Submit

You can see details about the report in the reports section.

10.2 Extend report

Attach the appropriate document and click Submit.

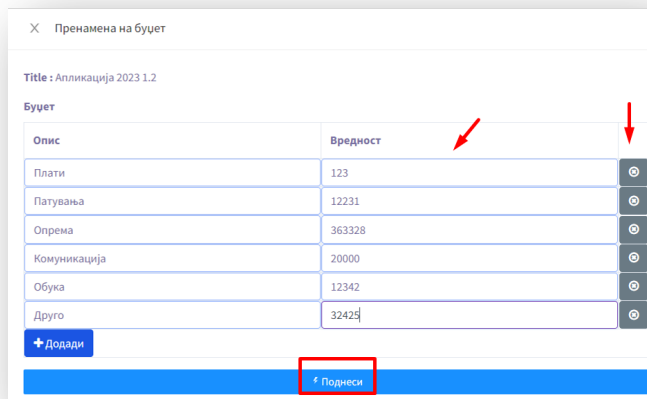# 10.3 Reassignment of budget

Under More Actions, click Repurpose Budget.
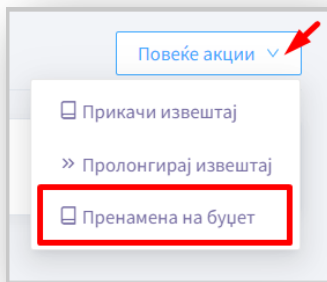
Make the necessary changes according to the requested conversion.
Click Submit.
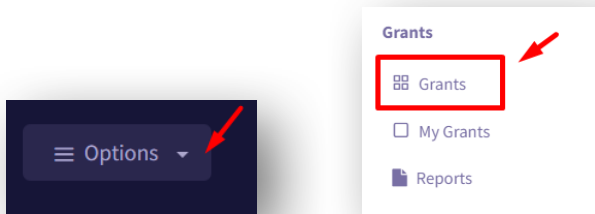If the change is approved by the coordinator, it will be included in the budget.
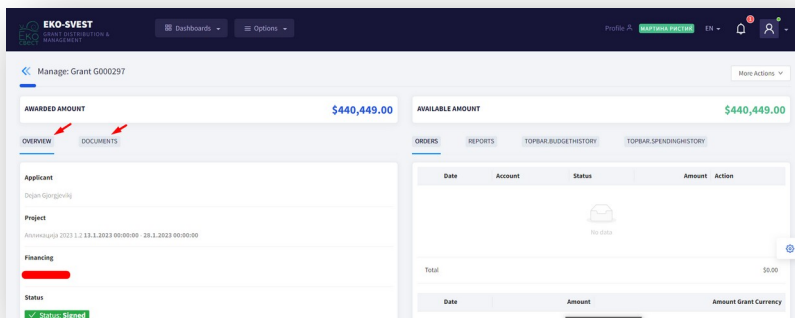
11. Grants

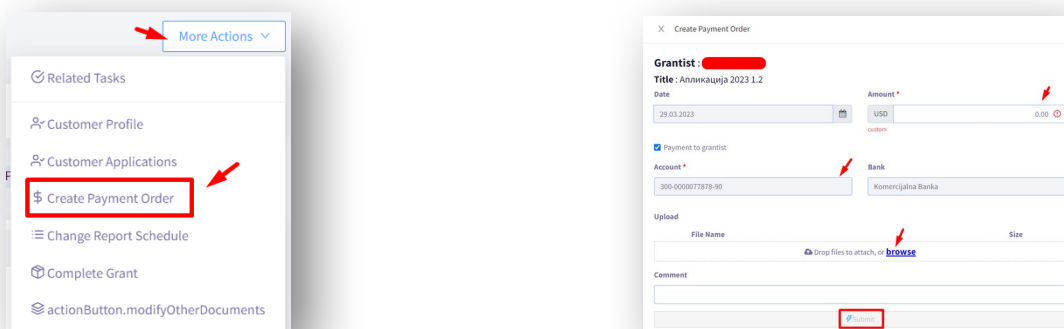On the Options menu, click Grants.

In the grant section, you can see the basic data about the grant.

11.1 Orders

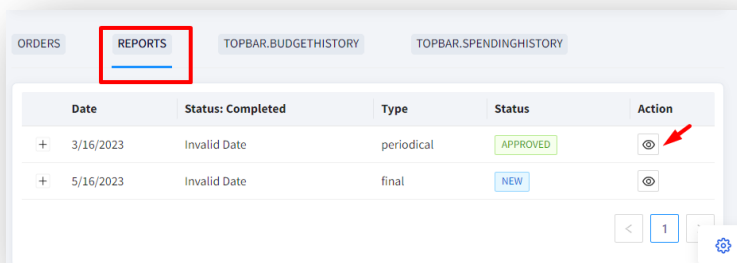In the More Actions menu, click Create Payment Order.
Enter all required payment details, attach required documents, write a comment and click Submit.
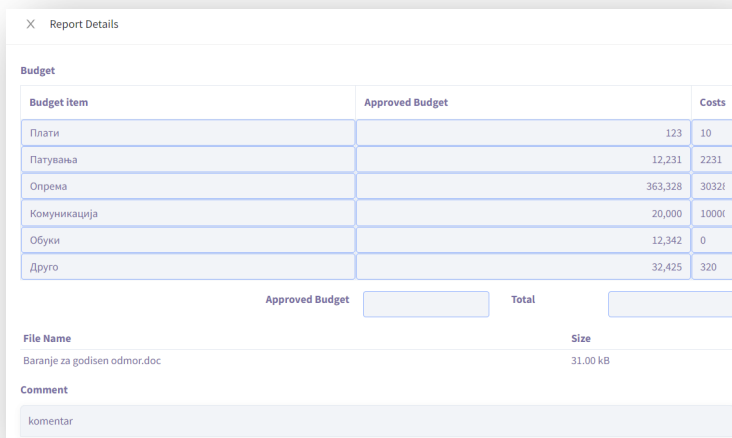
You can view payment details in the Orders tab.

11.1 Reports

You can view the details of the reports in the Reports tab.

To change the report plan to More Actions click Change Report Schedule. Make the necessary changes to the schedule and click Submit.
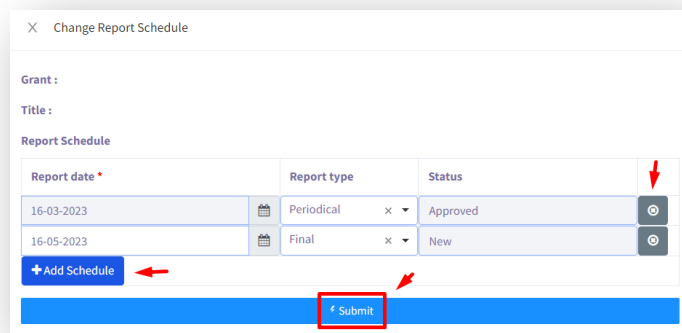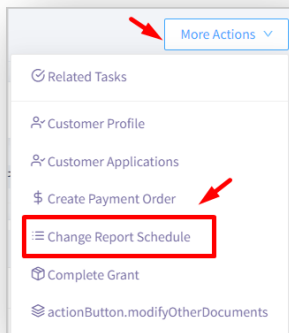
11.2 Budget

The Budget tab presents the initial approved budget and all approved changes to it.

11.3 Spending history

In the Spending history tab you can see the costs for each report.
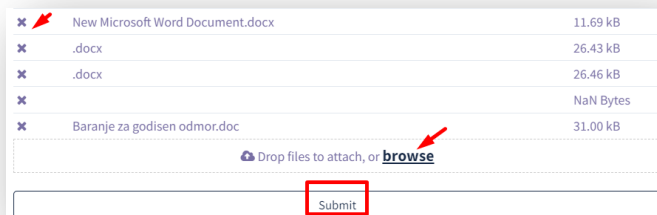
11.4   Update Documents

Under More Actions, click Update Documents.
Add a document or delete any of the already added documents related to the grant.
Click Submit