

The Family League Grant Management System

Instruction Manual

For Scope and Budget Submission

What follows are step-by-step instructions for accessing The Family League of Baltimore City's (FLBC) online Grant Management System (GMS) in order to submit and/or revise Scopes of Work and corresponding Budgets for the FY12 contract. Instructions are broken out in the following sections which include complete step-by-step instructions for completing each section:

SECTION 1: LOGIN AND DASHBOARD VIEW

SECTION 2: COMPLETING SCOPE REVISIONS

SECTION 3: ENTERING BUDGET ITEMS


SECTION 4: COMPLETING BUDGET REVISIONS

SECTION 5: ADDITIONAL INFORMATION

SECTION 1 – LOGIN AND DASHBOARD VIEW

Dashboard

STEP 1: Go to the URL for the GMS module for completing Scope and Budget Revisions (<http://flbc.onlinereporting.org/grant>). This can also be accessed via FLBC's homepage (<http://www.flbcinc.org>). Type in User Name and Password created when your organization registered with the system.



The screenshot shows the login interface for the Family League of Baltimore Grant Management System. The header features the logo "FAMILY LEAGUE OF BALTIMORE" in green and white, followed by the text "Grant Management System". Below the header is a light green box containing the login form. The form has two input fields: "e-mail:" and "Password:". Below the "Password:" field is a green "Login" button and a blue link labeled "Forgot Password?".

Passwords are Case Sensitive.

Email addresses and passwords should be typed in exactly as they were typed in during signup.

Press the “forgot password” link if you need to retrieve your password.

Your password will be emailed to you.

STEP 2: GMS Application Dashboard

You will be logged into your GMS Dashboard Page

The screenshot displays the GMS Application Dashboard for Family League of Baltimore. The header includes the organization's name and logo, the system title 'Grant Management System', and navigation links for 'Organization Management', 'Family League', and 'Logout'. The user is logged in as 'Vendor'. The main content area shows a breadcrumb for 'Dashboard' and the organization name 'Organization Name, Inc'. Below this is the 'OST Budget / Scope Revision Dashboard' which contains a table with the following data:

	FLBC Total	Funding Amount	School / Summer	Revisions Needed	Date Revised	Date Accepted
Name of Scope		\$0.00		-	-	-
Budget Form		\$0.00		-	-	-
Budget Summary		\$0.00		-	-	-

Below the table are links for 'Scope Revision Guidance' and 'Budget Revision Guidance'. The footer contains the copyright information: '© 2011 Copyright – FirstPic, Inc.'

IMPORTANT

- You can return to your Dashboard page by clicking on the Dashboard link at the top of each page.
- Your Dashboard page provides an overview of what Scope(s) and/or Budget(s) need revision.
- Your Dashboard displays the latest revision of your Scope and/or Budget, whether revisions are needed, and if applicable the date that it was accepted
- Your Dashboard also shows your total funding amount for each Scope, as well as the total amount of FLBC Funds allocated in each budget

SECTION 2 – COMPLETING SCOPE REVISIONS

Dashboard

Name of Organization


OST Budget / Scope Revision Dashboard

	FLBC Total	Funding Amount	School / Summer	Revisions Needed	Date Revised	Date Accepted
Scope Name		\$120,000.00		Yes	-	-
Scope Revision Form						
Budget Form Budget Summary	\$0.00				-	-

Scope Revision Guidance

 <i>Posted by Super Admin</i>	08/08/2011
 <i>Posted by Super Admin</i>	08/08/2011

Budget Revision Guidance

 <i>Posted by</i>	08/09/2011
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Step 1: Determining if Revisions are Needed

- When you access your dashboard for the first time it will indicate that your Scope needs revisions. Whether or not changes are made, it will need to be submitted as directed below
- You will see a red box containing the word “Yes” under the Revisions Needed column
- The Date Revised column will show the date of the latest revision, if applicable
- Once a Scope is approved, that date will appear in the Date Accepted column

Step 2: Reviewing the Current Version of Your Scope

- To view the current version of your scope click the button with your Scope/Site name on it

Name of Scope

- This will bring up the Scope Revision Print Screen


🏠 > [Dashboard](#) > Name of your Organization > > Scope Revision Print

Scope Revision Print

Organization Name

Organization:
Program Name: Name of Scope

Site	Site Name
School / Center Name	School Name
Address	525 Hurley Avenue
	21223
School(s) attended by youth served	
School 1	Frederick Elementary School - Letter 1 AOSLetterofCommitmentFrederickElem.pdf
School 2	Beechfield Elementary School/Middle School - Letter 2 AOSLetterofCommitmentBeechfield.pdf
School 3	Samuel F. B. Morse - Letter 3 AOSLetterofCommitmentSamuelFBMorse.pdf
Neighborhood(s) where youth to be served reside	
Neighborhood 1	Southwest Baltimore

From here, you can print out a hard copy of your scope for your review by clicking the “Print” Button 

- You can return to the Dashboard by clicking the “Dashboard” link at the top of your screen or by clicking the “Back” button on your web browser

- After you have made changes, you can bring up the “Scope Revision Print”

screen by clicking the “Print” button



[Dashboard](#) > Name of your Organization > Scope Revision Print

Scope Revision Print

Organization Name

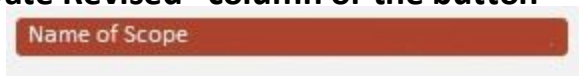
Organization:
 Program Name: Name of Scope

Site	Site Name
School / Center Name	School Name
Address	525 Hurley Avenue
	21223
School(s) attended by youth served	
School 1	Frederick Elementary School - Letter 1 AOSLetterofCommitmentFrederickElem.pdf
School 2	Beechfield Elementary School/Middle School - Letter 2 AOSLetterofCommitmentBeechfield.pdf
School 3	Samuel F. B. Morse - Letter 3 AOSLetterofCommitmentSamuelFBMorse.pdf
Neighborhood(s) where youth to be served reside	
Neighborhood 1	Southwest Baltimore

- From here, you can print a hard copy of your revision by clicking the “Print” Button at the bottom of the screen
- Return to your “Scope Revision Form” by clicking the “Back” button on your web browser
- If you are satisfied with the revisions you have made, you can submit the “Scope Revision Form” for review by FLBC staff by clicking the “Submit for Review” button



- This will take you back to your Dashboard. You will notice that the “Date Revised” column will now contain the date that your Revised Scope was submitted for review
- By clicking either the date in the “Date Revised” column or the button containing the name of your scope

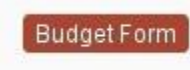


- When your scope is approved, you will see the “Date Accepted” field populated by the date in which FLBC approved the scope in its revised form (NOTE: You will also receive an e-mail notification confirming your acceptance)

SECTION 3: ENTERING BUDGET ITEMS

There are two phases to the budget process within the GMS. The first phase requires that you enter the various items contained in your budget, making sure to detail the portion of the line items being paid with FLBC provided funds. The second phase requires you to make revisions to your budget based on guidance provided by FLBC staff. The first phase is outlined in this section, and the revisions phase will be outlined in SECTION 4.

STEP 1: Click on the “Budget Form” button for the Scope of Work for which you are going to enter budget information



- This will bring up the “Budget Form”

🏠 > [Dashboard](#) > Budget Form

Budget Form

Organization: _____ Start Date: 08/01/2011
 Program Name: _____ End Date: 05/31/2012


FLBC Total: \$0.00

Personnel	Fringe	Training/Conferences	Supplies	Contracted Services	Program Expenses	Other Expenses	Equipment Purchases	Admin/Indirect Costs
Personnel Total								FLBC Category Total: \$ 0.0000
Item Name	Description	Qty	Rate	Amount	FLBC	Other		

Add New Item

Item Name	Item Description	Qty	Rate	Amount	FLBC \$	Other \$
<input type="text" value="Name Of Item"/>	<input type="text" value="Brief Description"/>	<input type="text" value="10"/>	<input type="text" value="18.00"/>	<input type="text" value="180"/>	<input type="text" value="90"/>	<input type="text" value="90"/>
<input type="button" value="Add Item"/>						

*Note: To submit your budget for review, please press the Submit Button at the bottom of the Budget Detail.

- You will notice tabs for each category of items at the top of the form
- You will also see the total allocation of FLBC funds in the upper-right-hand corner of the form
- Select the category for which you would like to add items
- At the bottom of the form, you will see the “Add New Item” section
- Enter the appropriate information in each field
- For Personnel, enter the position and a description which includes the calculation that details the derivation of cost for that item (i.e., 10 hours per week *30 weeks @\$15 per hour) or (.5 FTE @ 40,000). The “Qty” field should contain the total number of hours the staff member will be actively working on tasks pertaining to this Scope of Work; the “Rate” field should contain the hourly rate which the staff member is paid
- For each item, the amount will be calculated based on “Qty” and “Rate”
- Enter the amount of FLBC funds (in dollars and cents, i.e., 15.75) to be allocated to this item in the “FLBC \$” field
- The dollar amount for non-FLBC funds will automatically be populated in the “Other \$” field
- When you are satisfied with the information in all of the fields, click the “Add Item” button  to add it to the budget form
- Once you add the item, it will appear in the budget form as a line item

✔ Item Added Successfully.
x

Organization:
Program Name:
Start Date: 08/01/2011
End Date: 05/31/2012

FLBC Total: \$90.00



Personnel	Fringe	Training/Conferences	Supplies	Contracted Services	Program Expenses	Other Expenses	Equipment Purchases	Admin/Indirect Costs
Personnel Total								FLBC Category Total: \$ 90.0000
Item Name	Description	Qty	Rate	Amount	FLBC	Other		
Name Of Item	Brief Description	10	18.0000	180.0000	90.0000	90.0000	edit delete	

Add New Item

Item Name	Item Description	Qty	Rate	Amount	FLBC \$	Other \$
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Add Item

*Note: To submit your budget for review, please press the Submit Button at the bottom of the Budget Detail.

- You will also see a message at the top of the screen stating that the item was added successfully
- You can edit or delete an item at any time by clicking either “edit” or “delete” next to the line item
- If you click the “edit” link, the “Add New Item” section of the form will be populated automatically with the information from the line item
- Simply make the changes necessary and click the “Add Item” button  when you are finished
- After you have entered all budget items for all categories, click the “View Budget Detail” button 
- This will bring up the “Budget Detail Report”, which is a detailed listing of all budget items entered for each category


[Home](#) > [Dashboard](#) > Budget Form


Budget Form

Organization:
Program Name:


Start Date: 08/01/2011
End Date: 05/31/2012

Category							FLBC Total: \$0.00
Personnel							
Item Name	Description	Qty	Rate	Amount	FLBC	Other	
Category Totals				\$0.0000	\$0.0000	\$0.0000	
Fringe							
Item Name	Description	Qty	Rate	Amount	FLBC	Other	
Category Totals				\$0.0000	\$0.0000	\$0.0000	
Training/Conferences							
Item Name	Description	Qty	Rate	Amount	FLBC	Other	
Category Totals				\$0.0000	\$0.0000	\$0.0000	
Supplies							
Item Name	Description	Qty	Rate	Amount	FLBC	Other	
Category Totals				\$0.0000	\$0.0000	\$0.0000	
Contracted Services							
Item Name	Description	Qty	Rate	Amount	FLBC	Other	
Category Totals				\$0.0000	\$0.0000	\$0.0000	

- After reviewing this form, you can print a hard copy for your records by clicking the “Print Report” button 
- **NOTE: When revising your budget, your guidance will appear at the bottom of this report**

- To submit the budget to FLBC for review, click the “Submit to FLBC Review” button 
- **NOTE: The budget submission must be done from the Budget Detail page. If you simply enter the budget information and close out, the budget information is not submitted for review**
- Back on the dashboard you will see that the “Date Revised” column will now contain the date in which you submitted your budget for review
- FLBC will review the budget and you will receive an email either indicating acceptance or that revisions are necessary

SECTION 4: COMPLETING BUDGET REVISIONS

On the dashboard, you will also have the option to view a summary version of your budget report. You can do this by clicking the “Budget Summary” button  . This will bring up your “Budget Summary Report”.

[Dashboard](#) > Budget Summary

Budget Summary

Organization:
Program Name:

Start Date: 08/01/2011
End Date: 05/31/2012

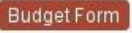
Category	Amount Total	FLBC TOTAL	FLBC Total: \$0.00 Other Total
Personnel	\$0.00	\$0.00	\$0.00
Fringe	\$0.00	\$0.00	\$0.00
Training/Conferences	\$0.00	\$0.00	\$0.00
Supplies	\$0.00	\$0.00	\$0.00
Contracted Services	\$0.00	\$0.00	\$0.00
Program Expenses	\$0.00	\$0.00	\$0.00
Other Expenses	\$0.00	\$0.00	\$0.00
Equipment Purchases	\$0.00	\$0.00	\$0.00
Admin/Indirect Costs	\$0.00	\$0.00	\$0.00
Totals	Amount Total: \$0.00	FLBC Total: \$0.00	Other Total: \$0.00



To print a copy of this report, click the “Print Report” button  .

If Budget Revisions are required, you will notice that the “Revisions Needed” column will say “Yes”. You will also see “Budget Guidance” at the bottom of your dashboard page.

(Note: If you have questions about the Budget Guidance, clicking the name by the “Posted by:” title will open your e-mail tool and pre-populate the address of the appropriate party for these questions)

To edit the budget, click the “Budget Form” button , and follow the guidance that is provided at the bottom of the form. To fill in the form, follow the steps outlined in SECTION 3 of this document.

When reviewing your “Budget Detail Report” prior to submission for FLBC review, you will notice that the guidance that was provided to you is at the bottom of the report. Should you choose to print this report, the guidance will also be on the bottom of the printed report.

SECTION 5: ADDITIONAL INFORMATION

The process for Scope and Budget revision could occur several times prior to final approval for each Scope of Work and Budget. Remember to repeat the steps above for each section as needed.

In order to conserve space (visually speaking) on the dashboard and reports, you will only be shown the eight (8) *most recent* guidance entries for Scope Guidance and Budget Guidance (16 total) at the bottom of the dashboard. The budget reports will only print the eight most recent guidance entries.

When a Scope or Budget has been approved you will notice that the “Revisions Needed” column of the dashboard will be populated by a green box with the work “No” in it. This will occur for each Scope and Budget as they are approved.

You can still review and print all Budget and Scope reports after they have been approved.

Online Scope and Budget Revision Tool

Technical Help and Support

Email: RFP_help@flbcinc.org

Phone: (443) 687-9860