

Please see below the link to view the recording from the held in June 2023. I have also attached a rough outline on how to build customized reports that we discussed from GMS. Please let me know if you have any additional questions or need any additional support.

https://us06web.zoom.us/rec/share/PMAeL6JEIviD_JQTqzbuzuanQx4IFr2e5Fch5UPb4WSqdpHAMCSV_21awNaiNMg.Cd61ILp_B7ATcrH
Passcode: 4%bU7\$^Z

1. Single click on blue G-GrantVantage icon at the bottom left of the GMS menu to bring up a list of choices. Then single click on “DAODAS Portal” to change the view from GMS to the DAODAS Portal Submission Dashboard.
2. Single click on “portal submissions” on the left side menu.
3. Click on “edit columns” to bring up a menu of the current columns that are displayed on the screen. Click on the “+ Add Columns” to bring up the entire list of data elements that can be added to the report. Select the following to add to the report: Form name, intervention type, strategy and total duration hours and minutes (first and third ones in the list) to add to the report. Click “Close” and then “Apply”.

The screenshot displays the Dynamics 365 GrantVantage interface. The main view is titled "All Active Portal Submissions" and shows a table of submission records. The table has columns for Submission ID, Grant Name, Objective, Organization, Performance Measure, Funding Source, County of Operation, and Date and Time. A "Edit columns" panel is open on the right side, showing a list of available data elements to be added to the report. The panel includes a search bar and a list of elements such as Submission ID, Grant Name, Objective, Organization, Performance Measure, Funding Source, County of Operation, Date and Time, Contact Name, Submitted Date, and Submission Status. The "Apply" button is visible at the bottom of the panel.

Submission ID	Grant Name	Objective	Organization	Performance Measure	Funding Source	County of Operation	Date and Time
DAS-010516	SABG22-PR-P...	Lex-Infor...	LRADAC ...	By June 30, 2...		Lexington	9/14/202...
DAS-010515	SABG22-PR-P...	Lex-Envir...	LRADAC ...	By June 30, 2...		Lexington	9/14/202...
DAS-010514	SABG22-PR-P...	Lex-Envir...	LRADAC ...	By June 30, 2...		Lexington	2/23/202...
DAS-010513	SABG22-PR-P...	Lex-Envir...	LRADAC ...	By June 30, 2...		Lexington	2/23/202...
DAS-010512	SABG22-PR-P...	Lex-Envir...	LRADAC ...	By June 30, 2...		Lexington	2/23/202...
DAS-010511	SABG22-PR-P...	Lex-Envir...	LRADAC ...	By June 30, 2...		Lexington	2/23/202...
DAS-010510	SABG22-PR-P...	Lex-Envir...	LRADAC ...	By June 30, 2...		Lexington	2/23/202...
DAS-010509	SABG22-PR-P...	Lex-Envir...	LRADAC ...	By June 30, 2...		Lexington	2/23/202...
DAS-010508	SABG22-PR-P...	Lex-Envir...	LRADAC ...	By June 30, 2...		Lexington	2/23/202...
DAS-010507	SABG22-PR-P...	Lex-Envir...	LRADAC ...	By June 30, 2...		Lexington	2/23/202...
DAS-010506	SABG22-PR-P...	Lex-Envir...	LRADAC ...	By June 30, 2...		Lexington	2/23/202...
DAS-010505	SABG22-PR-P...	Informati...	The Phoe...	By June 30, 2...		Greenville	11/8/202...

4. Click on “All Active Portal Submission” and then select “Set as default view”. You can then name the report and save it so that you can pull this view back up again in the future.
5. You can now begin to filter the information to pull a report with the parameters you want to see. For example, if you only want to see the information for your county (or the counties you

serve if you are serving a multi-county agency), filter by date and time (this is the date that pulls from the form of the date the service is implemented), strategy type, form name, etc.

6. Once you have the information filtered for what you want to see, you can then download the report as an Excel file so that you can continue to filter or work with the data. Examples are below. To pull the Excel view, click on the three dots beside "Rub Report" tab. Click "Export to Excel" and the Excel file should download to your computer. \
7. Contact DAODAS if you have any questions on how to utilize this view in GMS to produce customized reports.

Portal Submissions All Active Portal

das-prod.crm9.dynamics.com/main.aspx?appid=c7829778-e04d-ec11-8c62-001dd802fb44&pagetype=entitylist&etn=das_portalsubmissions&viewid=1dc916ae-190b-ee11-8f6d-001dd80b2...

UberConference Peer Reviewer - Rev... safety resources - S... Mail - Nienhius, M... EasyTestMaker Topic: Drugs & Sub... LEAD National Sup... MOSAIX IMPACT https://ncweb.pire... Leave Statement

Dynamics 365 GrantVantage Search

Show Chart + New Delete Refresh Visualize this view Email a Link Flow AI Builder Run Report

All Active Portal Submissions*

Edit columns Edit filters Filter by keyword

County of ...	Date a...	Contact ...	Submitte...	Submissi...	Form Name	Intervention Type	Strategy	Total Duration Min...	Total Duration Hou...
Aiken	6/14/202...	Tonya Av...		Draft	Speaking Engage...	UDP	Information Di...	45	2
Aiken	5/2/2023 ...	Tonya Av...	6/7/2023	Submit...	Social Media Post...	UIP	Information Di...	45	2
Aiken	5/1/2023 ...	Tonya Av...	6/7/2023	Submit...	Social Media Post...	UIP	Information Di...	30	0
Aiken	5/30/202...	Kandy Fo...	6/2/2023	Submit...	Social Media Post...	UIP	Information Di...	15	2
Aiken	5/25/202...	Kandy Fo...	6/2/2023	Submit...	Social Media Post...	UIP	Information Di...	15	1
Aiken	5/24/202...	Kandy Fo...	6/2/2023	Submit...	Social Media Post...	UIP	Information Di...	15	1
Aiken	5/23/202...	Kandy Fo...	6/2/2023	Submit...	Social Media Post...	UIP	Information Di...	15	1
Aiken	5/9/2023 ...	Kandy Fo...	6/2/2023	Submit...	Social Media Post...	UIP	Information Di...	15	2
Aiken	5/31/202...	Kandy Fo...	6/2/2023	Submit...	Speaking Engage...	UDP	Information Di...	45	1
Aiken	5/17/202...	Kandy Fo...	6/2/2023	Submit...	Brochures, Factsh...	UDP	Information Di...	30	0
Aiken	5/17/202...	Kandy Fo...	6/1/2023	Submit...	Health Fairs and ...	UDP	Information Di...	0	16

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Portal Submissions All Active Portal

das-prod.crm9.dynamics.com/main.aspx?appid=c7829778-e04d-ec11-8c62-001dd802fb44&pagetype=entitylist&etn=das_portalsubmissions&viewid=1dc916ae-190b-ee11-8f6d-001dd80b2d158...

UberConference Peer Reviewer - Rev... safety resources - S... Mail - Nienhius, M... EasyTestMaker Topic: Drugs & Sub... LEAD National Sup... MOSAIX IMPACT https://ncweb.pire... Leave Statement

Dynamics 365 GrantVantage Search

Show Chart Edit Activate Deactivate Delete Assign Share Email a Link Flow AI Builder

All Active Portal Submissions*

Run Report Word Templates Export to Excel

ng Source	County of ...	Date a...	Contact ...	Submitte...	Submissi...	Form Name	Intervention Type	Total Duration
	Berkeley	5/18/202...	Wehme H...		Draft	Multi-Agency Co...	UDP	
	Berkeley	5/17/202...	Ronnie W...		Draft	Multi-Agency Co...	UDP	Community-Ba... 0
eral Pr...	Berkeley	5/15/202...	Saundra ...		Draft	Systematic Planni...	UIP	Community-Ba... 0
	Berkeley	4/19/202...	Ronnie W...		Draft	Multi-Agency Co...	UDP	Community-Ba... 15
	Berkeley	3/15/202...	Ronnie W...		Draft	Multi-Agency Co...	UDP	Community-Ba... 15
	Berkeley	2/15/202...	Saundra ...		Draft	Multi-Agency Co...	UDP	Community-Ba... 0
	Berkeley	1/18/202...	Saundra ...		Draft	Multi-Agency Co...	UDP	Community-Ba... 0
	Berkeley	12/15/20...	Ronnie W...		Draft	Multi-Agency Co...	UDP	Community-Ba... 0
	Berkeley	12/6/202...	Saundra ...		Draft	Multi-Agency Co...	UDI	Community-Ba... 15
	Berkeley	11/16/20...	Ronnie W...		Draft	Multi-Agency Co...	UDP	Community-Ba... 0
	Berkeley	10/23/20...	Saundra ...		Draft	Multi-Agency Co...	UDI	Community-Ba... 0

1 - 15 of 15 (1 Selected) Page 1

AutoSave All Active Portal Submissions 6-15-2023 7:46:41 PM.xlsx Excel Table Tools Nienhius, Michelle

File Home Insert Page Layout Formulas Data Review View Developer Help ACROBAT Design Search Share Comments

M12 6/1/2023 11:32:49 AM

	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
	1	Subm	Grant Nam	Objec	Period	Founda	C	Date and Tim	Cont	Submitted D	Submission	Form Name	Interventio	Strategy	Total D	Total D										
	2	DAS-01C	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		6/14/2023 9:00	Tonya Avery		Draft	Speaking Engagements	UDP	Information Dissemina	45	2										
	3	DAS-01C	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/2/2023 13:52	Tonya A		6/7/2023 Submitted	Social Media Postings	UIP	Information Dissemina	45	2										
	4	DAS-01C	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		6/7/2023 13:49	Tonya A		6/7/2023 Submitted	Social Media Postings	UIP	Information Dissemina	30	0										
	5	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/30/2023 8:51	Kandy F		6/2/2023 Submitted	Social Media Postings	UIP	Information Dissemina	15	2										
	6	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/25/2023 16:10	Kandy F		6/2/2023 Submitted	Social Media Postings	UIP	Information Dissemina	15	1										
	7	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/24/2023 13:00	Kandy F		6/2/2023 Submitted	Social Media Postings	UIP	Information Dissemina	15	1										
	8	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/23/2023 9:00	Kandy F		6/2/2023 Submitted	Social Media Postings	UIP	Information Dissemina	15	1										
	9	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/9/2023 11:00	Kandy F		6/2/2023 Submitted	Social Media Postings	UIP	Information Dissemina	15	2										
	10	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/31/2023 11:00	Kandy F		6/2/2023 Submitted	Speaking Engagements	UDP	Information Dissemina	45	1										
	11	DAS-00S	SABG22-PR-Pf Informa	Aike	To provide the ctti:	Aike		5/17/2023 10:00	Kandy F		6/2/2023 Submitted	Brochures, Factsheets,	UIPD	Information Dissemina	30	0										
	12	DAS-00S	SABG22-PR-Pf Health I	Aike	By June 30, 2023,	A Aike		5/17/2023 10:00	Kandy F		6/1/2023 Submitted	Health Fairs and Other	UIPD	Information Dissemina	0	16										
	13	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/25/2023 11:00	Kandy F		6/2/2023 Submitted	Speaking Engagements	UDP	Information Dissemina	15	2										
	14	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/18/2023 11:00	Kandy F		5/17/2023 Submitted	Speaking Engagements	UDP	Information Dissemina	30	2										
	15	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/10/2023 19:00	Tara Bro		5/17/2023 Submitted	Social Media Postings	UIP	Information Dissemina	15	0										
	16	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/10/2023 11:00	Tonya A		5/17/2023 Submitted	Speaking Engagements	UDP	Information Dissemina	0	2										
	17	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/12/2023 19:00	Tara Bro		5/17/2023 Submitted	Social Media Postings	UIP	Information Dissemina	15	0										
	18	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/9/2023 12:43	Tara Bro		5/17/2023 Submitted	Social Media Postings	UIP	Information Dissemina	15	0										
	19	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/2/2023 15:30	Tara Bro		6/8/2023 Submitted	Media Campaigns	UIP	Information Dissemina	45	1										
	20	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/2/2023 14:10	Tonya A		5/2/2023 Submitted	Speaking Engagements	UDP	Information Dissemina	15	1										
	21	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/1/2023 13:10	Tonya A		5/2/2023 Submitted	Speaking Engagements	UDP	Information Dissemina	30	1										
	22	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/1/2023 11:30	Tonya A		5/2/2023 Submitted	Speaking Engagements	UDP	Information Dissemina	0	1										
	23	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/1/2023 10:30	Tonya A		5/2/2023 Submitted	Speaking Engagements	UDP	Information Dissemina	0	1										
	24	DAS-00S	SABG22-PR-Pf Informa	Aike	By June 30, 2023,	A Aike		5/1/2023 9:30	Tonya A		5/2/2023 Submitted	Speaking Engagements	UDP	Information Dissemina	30	2										

Portal Submissions All Active Por

das-prod.crm9.dynamics.com/main.aspx?appid=c7829778-e04d-ec11-8c62-001dd802fb44&pagetype=entitylist&etn=das_portalsubmissions&viewid=1dc916ae-190b-ee11-8f6d-001dd80b2d15&...

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Show Chart Edit Activate Deactivate Delete Assign Share Email a Link Flow AI Builder

All Active Portal Submissions*

Edit columns Edit filters Filter by keyword

ng Source	County of ...	Date a...	Contact ...	Submitte...	Submissi...	Form Name	Intervention Type	Strategy	Total Duration Min...	Total Duration
	Berkeley	5/18/202...	Wehme H...	Draft		Multi-Agency Co...	UDP	Community-Ba...	0	
	Berkeley	5/17/202...	Ronnie W...	Draft		Multi-Agency Co...	UDP	Community-Ba...	0	
eral Pr...	Berkeley	5/15/202...	Saundra ...	Draft		Systematic Planni...	UIP	Community-Ba...	0	
	Berkeley	4/19/202...	Ronnie W...	Draft		Multi-Agency Co...	UDP	Community-Ba...	15	
	Berkeley	3/15/202...	Ronnie W...	Draft		Multi-Agency Co...	UDP	Community-Ba...	15	
	Berkeley	2/15/202...	Saundra ...	Draft		Multi-Agency Co...	UDP	Community-Ba...	0	
	Berkeley	1/18/202...	Saundra ...	Draft		Multi-Agency Co...	UDP	Community-Ba...	0	
	Berkeley	12/15/20...	Ronnie W...	Draft		Multi-Agency Co...	UDP	Community-Ba...	0	
	Berkeley	12/6/202...	Saundra...	Draft		Multi-Agency Co...	UDI	Community-Ba...	15	
	Berkeley	11/16/20...	Ronnie W...	Draft		Multi-Agency Co...	UDP	Community-Ba...	0	
	Berkeley	10/23/20...	Saundra ...	Draft		Multi-Agency Co...	UDI	Community-Ba...	0	

1 - 15 of 15 (1 Selected) Page 1