

Upload Documents in Organization Profile

These documents apply across multiple events.



Upload Organization Documents

The screenshot displays the Grants Portal interface. At the top left is the 'Grants Portal' logo. The top right shows a notification bell with '7' and a user profile for 'Leghorn, Fogho...'. A left sidebar contains navigation items: Dashboard, My Organization (selected), Organization Profile, Organization Personnel, Applicant Event Profiles, Exploratory Calls, Recovery Scoping Meetings, Projects, Damages, Work Order Requests, and Work Orders. Below the sidebar, the main content area shows 'RECIPIENT REGION Region 7'. A list of organization-related cards is displayed, including 'Locations', 'Counties with Facility', 'Insurance Profile', 'Applicant Event Profiles', and 'Documents'. The 'Documents' card features an 'UPLOAD' button, a 'DOWNLOAD' dropdown, and a 'MANAGE' button. A red callout box points to the 'Organization Profile' link in the sidebar, and another red callout box points to the 'UPLOAD' button in the 'Documents' card.

Step 1: Click Organization Profile

Step 2: Click Upload

Upload Insurance Document

Grants Portal

Dashboard

My Organization
Banatown (8790)

My Orga
Banatown (8790)

Organization Profile

Organization Personnel

General Informati

Documents Pending Upload

To begin uploading a document, either drag and drop a file or multiple files into the area above or click the area above to upload files manually.

Note: You may not upload the document to the Insurance Profile that matches an existing document with same document area.

UPLOAD PENDING DOCUMENTS CANCEL

Click and drag document or click to add file

Select Insurance Document – Pop-Up Box

The screenshot shows the 'Grants Portal' interface with a sidebar on the left containing navigation options like 'Dashboard', 'My Organization', 'Organization Profile', etc. The main content area is partially obscured by two overlapping windows. The top window is titled 'Upload Insurance Documents' and contains a dashed box with an upload icon and text: 'You a...', 'disab...', 'If the...', 'here', 'Other...'. Below this is a 'Documents F...' section. The bottom window is a 'File Upload' dialog box showing a file list. A red callout box points to the file 'Glenville PDMG009 Insurance Doc' with the text 'Step 1: Select the document to upload'. Another red callout box points to the 'Open' button at the bottom of the dialog with the text 'Step 2: Click Open'.

Name	Date modified	Type
Glenville PDMG009 damage inspection Hourly ...	11/3/2017 8:44 AM	Micro
Glenville PDMG009 Debris Removal Contract	11/3/2017 11:06 AM	Micro
Glenville PDMG009 Dell Inc. Contract	11/3/2017 3:17 PM	Micro
Glenville PDMG009 Fringe Benefits	11/3/2017 8:42 AM	Micro
Glenville PDMG009 Hurricane work Log	11/3/2017 8:43 AM	Micro
Glenville PDMG009 Insurance Doc	10/30/2017 7:44 AM	Micro
Glenville PDMG009 Mutual Aid Agreement	11/3/2017 11:07 AM	Micro
Glenville PDMG009 PayPolicy	11/3/2017 8:41 AM	Micro
Glenville PDMG009 Roadway Maint Records	11/3/2017 4:56 PM	Micro
Glenville PDMG009 Work Orders	11/3/2017 8:41 AM	Micro

Add Document Description & Category Type

The screenshot shows the 'Grants Portal' interface with a modal window titled 'Upload Organization Profile Documents'. The modal contains a dashed box for file upload and a table of documents pending upload. A red callout bubble points to the 'EDIT' button for the document 'Payroll Policy.docx'.

Upload Organization Profile Documents

Drag and drop files here, or click here to select files.

Documents Pending Upload

Filename	Description	Size	Category
General Insurance 12-31-2020.jpg			
Insurance policy			
Payroll Policy.docx		11.4 KB	

Showing 1 to 1 of 1 entries

Click Edit

UPLOAD PENDING DOCUMENTS CANCEL

Add Document Description & Category Type

The screenshot shows the 'Grants Portal' interface with a 'Process Document' modal open. The modal contains a yellow caution box, a 'Filename' field with 'Payroll Policy.docx', a 'Description' field, a 'Category Filter (Optional)' dropdown set to 'All', and a 'Category' dropdown with 'pay' entered. A list of categories is shown below, with 'Force Account Labor Pay Policy' selected. Three red callout boxes provide instructions: 'Step 1: Write description of document' points to the description field; 'Step 2: Begin typing type of document in the Category box' points to the category dropdown; and 'Step 3: Click to select document category type' points to the selected category in the list.

Step 1: Write description of document

Step 2: Begin typing type of document in the Category box

Step 3: Click to select document category type

Add Document Description & Category Type

Grants Portal

Dashboard

My Organization
Bananatown (8790)

My Organization Profile
Bananatown (8790) / Manage Documents

Organization Profile

Organization Personnel

Applicant Event Profiles

Exploratory Calls

Recovery Scoping Meetings

Projects

Damages

Work Order Requests

Work Orders

My Tasks

Calendar

Utilities

Resources

Intelligence

Filename	Description
EDIT General Insurance Expires	REMOVE 12-31-2020.jpg
EDIT Insurance policy.docx	REMOVE

Showing 1 to 2 of 2 entries

Process Document

CAUTION: Document will be uploaded to the Organization profile.

Filename *
Payroll Policy.docx

Description
Fire Department Payroll Policy

Category Filter (Optional)
All

Category *
× Force Account Labor Pay Policy

[SAVE](#) [CANCEL](#)

Click Save

Add Insurance Documents

Step 1: Repeat uploading any additional documents

Upload Organization Profile Documents

Drag and drop files here, or click here to select files.

Documents Pending Upload

	Filename	Description	Size	Category
✓	Payroll Policy.docx	Fire Department Payroll Policy	11.4 KB	Force Account Labor Pay Policy

Showing 1 to 1 of 1 entries

Previous 1 Next

UPLOAD PENDING DOCUMENTS CANCEL

Step 2: When all documents are uploaded, click **Upload Pending Document**

Manage Uploaded Documents in Organization Profile



Manage Organization Uploaded Documents


The screenshot shows the Grants Portal interface. At the top left is the 'Grants Portal' logo. At the top right, there is a notification bell with the number '7' and a user profile for 'Leghorn, Fogho...'. Below the header is a navigation sidebar on the left with items: Dashboard, My Organization (selected), Organization Profile, Organization Personnel, Applicant Event Profiles, Exploratory Calls, Recovery Scoping Meetings, Projects, Damages, Work Order Requests, and Work Orders. The main content area shows 'RECIPIENT REGION Region 7'. Below this are several rows of information: 'Locations', 'Counties with Facility', 'Insurance Profile', 'Applicant Event Profiles', and 'Documents'. The 'Documents' row has buttons for 'UPLOAD', 'DOWNLOAD', and 'MANAGE'. A red callout box labeled 'Step 1: Click Organization Profile' points to the 'Organization Profile' menu item. Another red callout box labeled 'Step 2: Click Manage' points to the 'MANAGE' button in the 'Documents' row.

Step 1: Click
Organization Profile

Step 2: Click
Manage







Edit Document Name

Portal 🔔 7 👤 Leghorn, Foghor...

 My Organization Profile Manage Documents [+ ADD DOCUMENT](#) [GO BACK](#)

Glenville - PDMG0009 - 4332DR (4332DR - 9) / Manage Documents

🔍 Search... 👁️ SHOW/HIDE COLUMNS

			Size	Category	Uploaded Date	Uploaded By
 		esheets	11.2 KB	Force Account Labor Payroll / Timesheets; Force Account Labor Summary	05/23/2018 11:26 AM CDT	Leghorn, Foghorn
 	Glenville PDMG0009 Pay Policy.docx	Employee Payroll policy	11.2 KB	Force Account Labor Pay Policy	08/07/2018 05:21 PM CDT	Leghorn, Foghorn
 	Insurance Policy.docx	Wind and Fire Policy	11 KB	Insurance Certificate; Insurance Policy	05/23/2018 10:15 AM CDT	Leghorn, Foghorn

10 Previous 1 Next

Showing 1 to 3 of 3 entries

Click **Edit**

Edit Name

The screenshot shows a web portal with a 'Manage Documents' section. An 'Edit Document' modal is open, displaying the following information:

- Filename: Glenville PDMG0125 Paypolicy.docx
- Description: Payroll Policy
- Types: All
- Category: x Force Account Labor Pay Policy

At the bottom of the modal are two buttons: 'SAVE CHANGES' (highlighted with a red arrow) and 'CANCEL'.

Step 1: Edit information

Step 2: Click Save Changes

Remove Documents

Grants Portal Crocker, Betty

Dashboard | **My Organization** (Banantown (8790)) | **My Organization Profile** **Manage Documents** + ADD DOCUMENT GO BACK

Banantown (8790) / **Manage Documents** SHOW/HIDE COLUMNS

Search...

	Filename	Description	Size	Category	Uploaded Date	By
EDIT REMOVE	General Insurance Expires 12-31-2020.jpg		606.4 KB	Contract Costs Summary; Contract Invoices; Contractor Estimate; Force Account Equipment Rate Costs; Force Account Equipment Summary; Force Account Labor Pay Policy; Force Account Labor Payroll / Timesheets; Force Account Work Order / Activity Log; Maintenance Record; Photo; Procurement Policy	05/16/2019 09:31 AM AST	Crocker, Betty
EDIT REMOVE	Insurance policy.docx		11.4 KB	Insurance Policy	05/29/2019 10:25 PM AST	Crocker, Betty

10 | Showing 1 to 2 of 2 | Previous **1** Next

Click Remove

- Organization Profile
- Organization Personnel
- Applicant Event Profiles
- Exploratory Calls
- Recovery Scoping Meetings
- Projects
- Damages
- Work Order Requests
- Work Orders
- My Tasks
- Calendar
- Utilities
- Resources
- Intelligence

Delete Confirmation Pop-Up Box

The screenshot shows the Grants Portal interface. A sidebar on the left contains navigation items: Dashboard, My Organization (Bananatown (8790)), Organization Profile, Organization Personnel, Applicant Event Profiles, Exploratory Calls, Recovery Scoping Meetings, Projects, Damages, Work Order Requests, Work Orders, My Tasks, Calendar, Utilities, Resources, and Intelligence. The main content area is titled 'My Organization Profile' and 'Manage Documents' for Bananatown (8790). It features a search bar and a table of documents. A 'Confirm Delete' pop-up box is overlaid on the table, asking 'Are you sure you would like to remove this document?' with 'YES' and 'NO' buttons. A red callout bubble points to the 'YES' button with the text 'Click Yes'.

Filename	Description	Size	Category
EDIT REMOVE	General Insurance Expires 12-31-2020.jpg	606.4 KB	Contract Costs Summary; Contract Invoices; Contractor Estimate; Force Account Equipment Rate Costs; Force Account Equipment Summary; Force Account Labor Pay Policy; Force Account Labor / Timesheets; Force Account Work Order / Activity
EDIT REMOVE	Insurance policy.docx	11.4 KB	Insurance Policy