

Client Portal Dashboard – Upcoming Activities

Grant administration tasks (workflows) for an Approved Project display as *Upcoming Activities* within the Home Page of the Enquire Grant Management System (GMS) client portal.

1. Below is an example of *Upcoming Activities* displayed on the Home Page of the GMS.

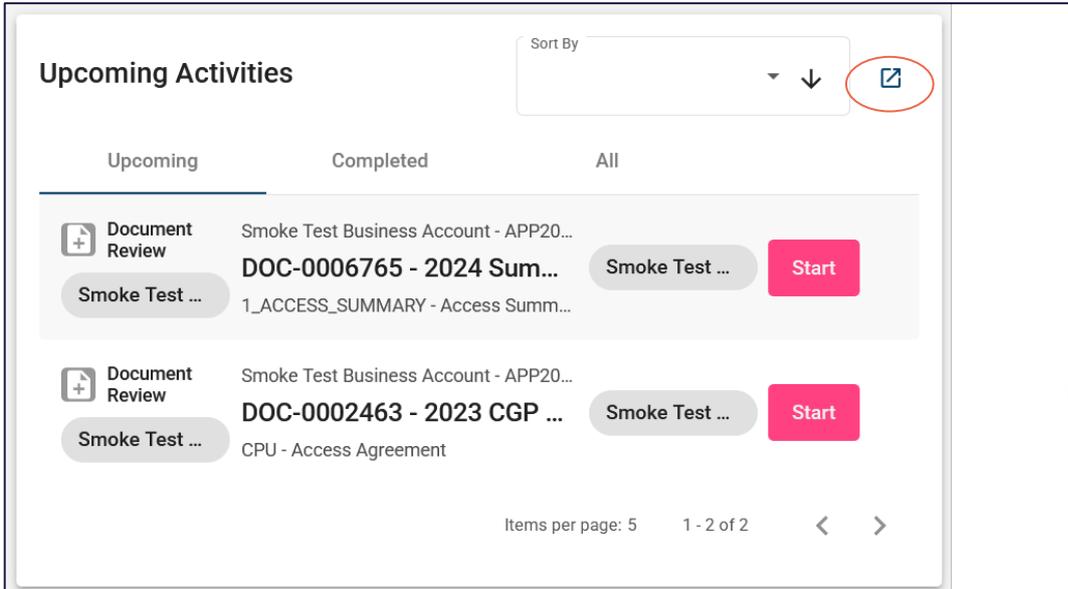
The screenshot shows the 'Upcoming Activities' dashboard. At the top, there is a 'Sort By' dropdown menu and a refresh icon. Below this are three tabs: 'Upcoming', 'Completed', and 'All'. The 'Upcoming' tab is selected. The dashboard displays two document review tasks. Each task includes a 'Document Review' icon, a title, a document ID, a 'Smoke Test ...' button, and a 'Start' button. The first task is 'DOC-0006765 - 2024 Sum...' and the second is 'DOC-0002463 - 2023 CGP ...'. At the bottom, there is a pagination bar showing 'Items per page: 5' and '1 - 2 of 2' with navigation arrows.

2. Workflows that need to be completed will appear under the *Upcoming* menu. The *Completed* menu will display workflows that have been completed, and the *All* menu will show a combination of workflows that have been completed and are yet to be completed.

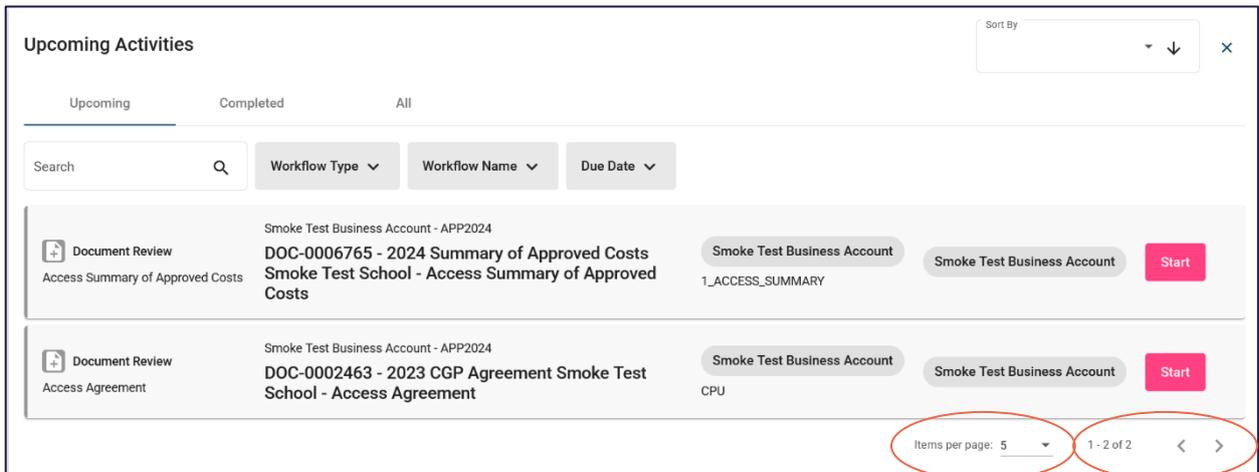
This screenshot is identical to the one above, but with the 'Upcoming', 'Completed', and 'All' tabs circled in red to highlight them. The rest of the dashboard content, including the document review tasks and pagination, remains the same.



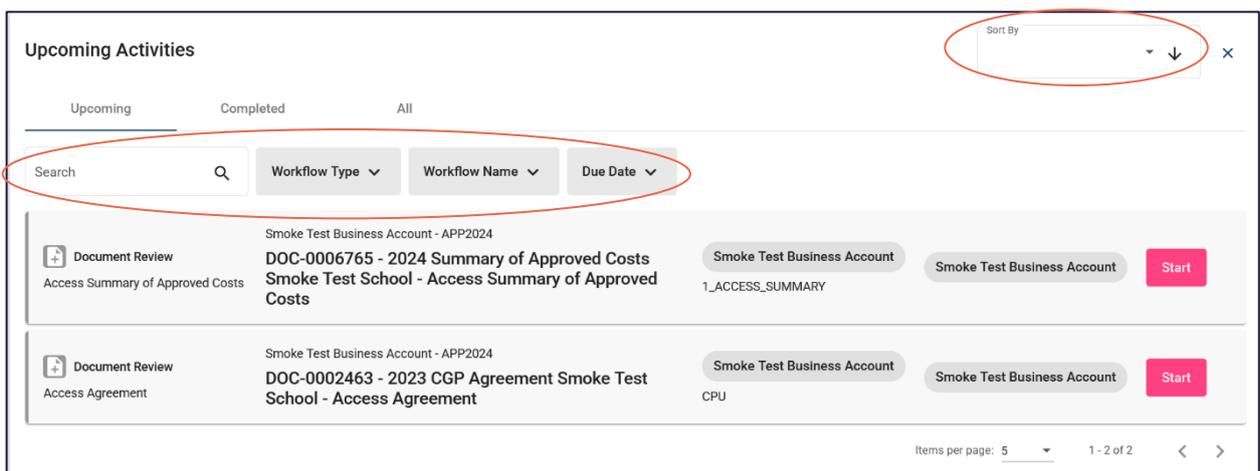
3. Click the boxed arrow button to expand the *Upcoming Activities* dashboard view.



4. View more items on the page by selecting the *Items per page* button or toggle to the next page of workflows by using the arrow buttons.



5. Use the sort by, search or filter buttons to refine your searches.



6. Use cross to close the expanded view.

The screenshot shows a web interface titled "Upcoming Activities". At the top right, there is a "Sort By" dropdown menu with a close button (an 'X' icon) circled in red. Below the title are three tabs: "Upcoming", "Completed", and "All". A search bar is on the left, and three filter buttons are in the center: "Workflow Type", "Workflow Name", and "Due Date". The main content area contains two activity cards. Each card has a plus icon and the text "Document Review". The first card is for "DOC-0006765 - 2024 Summary of Approved Costs" and the second is for "DOC-0002463 - 2023 CGP Agreement Smoke Test School - Access Agreement". Both cards have a "Start" button. At the bottom right, there is a pagination control showing "Items per page: 5" and "1 - 2 of 2".