

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.

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

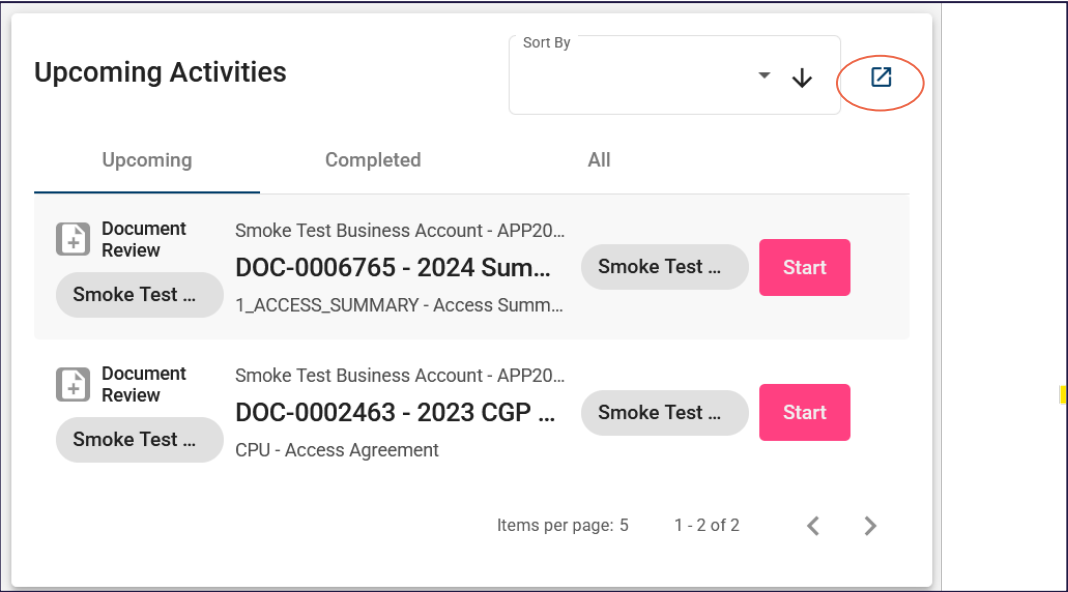
The screenshot shows the 'Upcoming Activities' section of the GMS client portal. At the top, there is a 'Sort By' dropdown menu and a link icon. Below this are three tabs: 'Upcoming', 'Completed', and 'All'. The 'Upcoming' tab is selected. The main content area displays two document review tasks. Each task includes a 'Document Review' icon, a title, a document ID, a 'Smoke Test ...' button, and a 'Start' button. The first task is 'Smoke Test Business Account - APP20...' with document ID 'DOC-0006765 - 2024 Sum...' and a sub-task '1_ACCESS_SUMMARY - Access Summ...'. The second task is 'Smoke Test Business Account - APP20...' with document ID 'DOC-0002463 - 2023 CGP ...' and a sub-task 'CPU - Access Agreement'. At the bottom, there is a pagination bar showing 'Items per page: 5' and '1 - 2 of 2' with navigation arrows.

- 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.

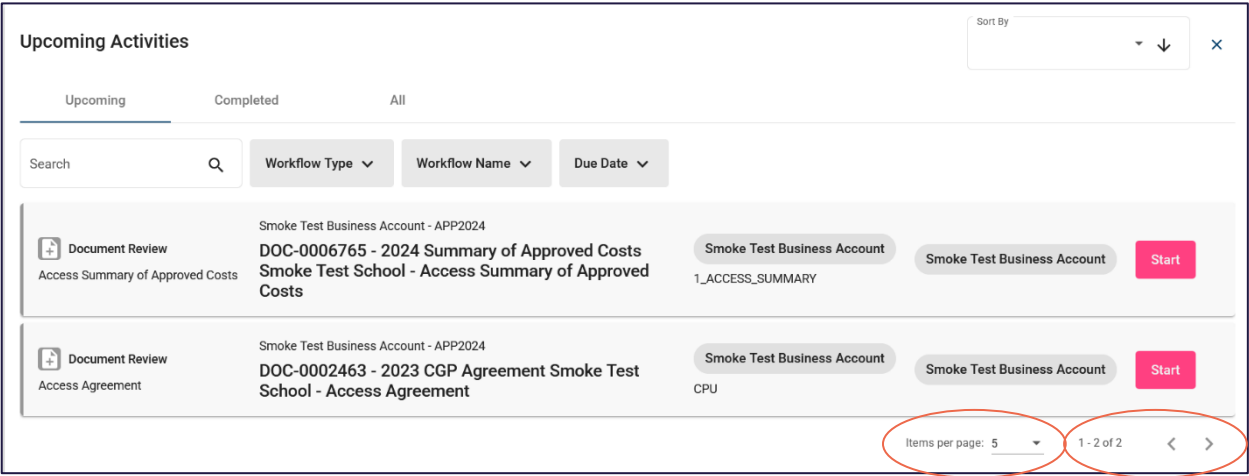
This screenshot is identical to the one above, but with red circles highlighting the 'Upcoming', 'Completed', and 'All' tabs to illustrate the navigation options. The 'Upcoming' tab is currently selected.



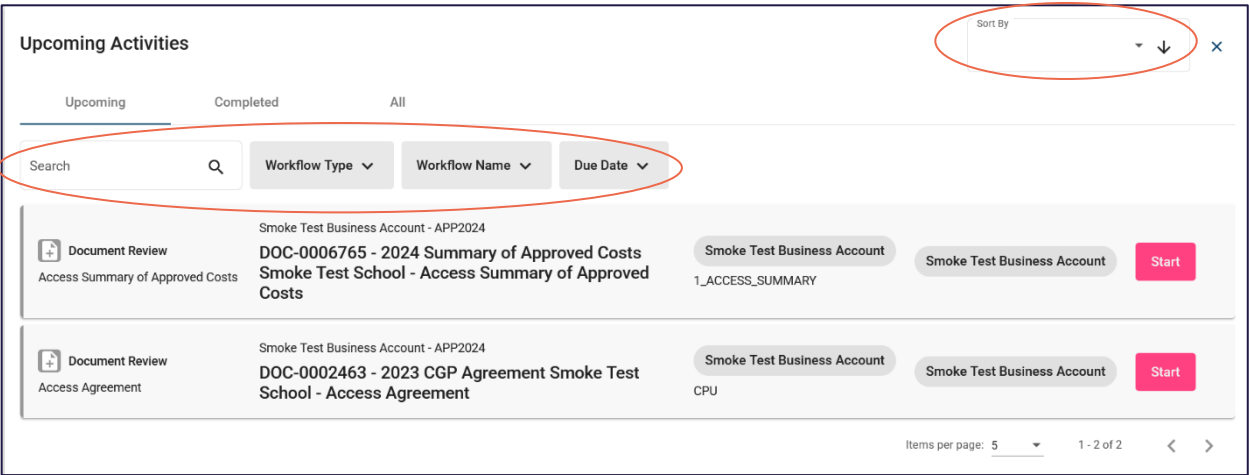
3. Click the boxed arrow button to expand the *Upcoming Activities* dashboard view.



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.

Upcoming Activities

Sort By

Upcoming

Completed

All

Search

Workflow Type

Workflow Name

Due Date

+

Document Review

Access Summary of Approved Costs

Smoke Test Business Account - APP2024

DOC-0006765 - 2024 Summary of Approved Costs

Smoke Test School - Access Summary of Approved Costs

Smoke Test Business Account

1_ACCESS_SUMMARY

Smoke Test Business Account

Start

+

Document Review

Access Agreement

Smoke Test Business Account - APP2024

DOC-0002463 - 2023 CGP Agreement Smoke Test School - Access Agreement

Smoke Test Business Account

CPU

Smoke Test Business Account

Start

Items per page: 5

1 - 2 of 2

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