

## Overview

This document is designed to provide grant applicants with instructions for use of the Foundant Grant Lifecycle Manager application. Remember while this document attempts to provide step-by-step instructions, we realize that not all user scenarios may be adequately covered. If you remain on a page with inactivity for longer than 40 minutes, you will be logged off for security reasons. Please save every 15-25 minutes.

## Registration Page

If you already have an account with this Foundant Grant Lifecycle Manager;

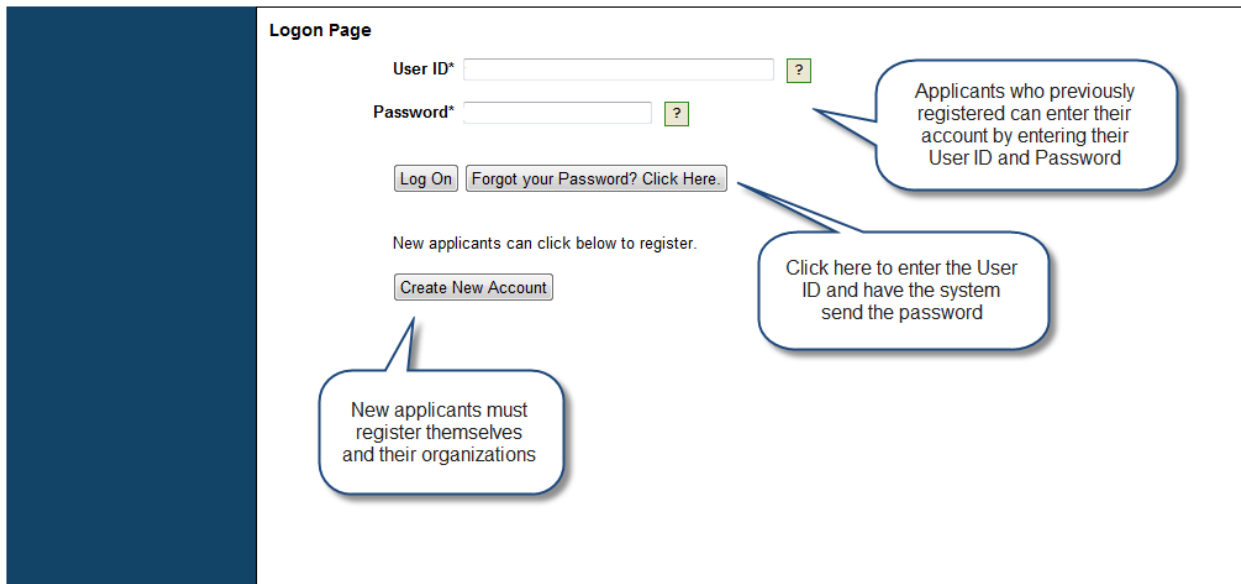
1. Enter your login, which is your e-mail address, in the login field
2. Enter the Password that you chose when you set up your account.
3. Press the “Log On” button to enter the Grant Lifecycle Manager.

If you have forgotten your password;

4. You can click on the Forgot your Password button, enter your User ID, and the system will email your password to your e-mail account.

If you do not have an existing account;

5. Click on Create New Account to register.



The screenshot shows the 'Logon Page' interface. It features two input fields: 'User ID\*' and 'Password\*', each with a green question mark icon to its right. Below these fields are two buttons: 'Log On' and 'Forgot your Password? Click Here.'. Underneath the buttons, there is a line of text: 'New applicants can click below to register.' followed by a 'Create New Account' button. Three callout boxes provide additional information: one points to the 'Forgot your Password? Click Here.' button, stating 'Applicants who previously registered can enter their account by entering their User ID and Password'; another points to the 'Create New Account' button, stating 'Click here to enter the User ID and have the system send the password'; and a third points to the bottom left area, stating 'New applicants must register themselves and their organizations'.

## To register an account

1. Click on Create New Account
2. Enter your personal contact information
3. Enter your organization's contact information
4. Click on the Proceed to Next Step button

(See diagram on next page)

## Register

Enter your contact information below.  
\* = Required Field

### User Information

Please provide contact information for the person submitting this request.

Salutation  ?

First Name  ?

Middle Name  ?

Last Name  ?

Suffix  ?

Business Title  ?

Address 1  ?

Address 2  ?

City  ?

State/Province  ?

Postal Code  ?

Country  ?

Phone Number  ?

Mobile Number  ?

Fax  ?

Email  ?

Applicant Information

### Organization Information

Please provide contact information for the Chief Executive of the organization.

Organization Name\*  ?

Tax ID/Registered Charity Number  ?

Web Site  ?

Salutation  ?

First Name  ?

Middle Name  ?

Last Name  ?

Suffix  ?

Business Title  ?

Address 1  ?

Address 2  ?

City  ?

State/Province  ?

Postal Code  ?

Country  ?

Phone Number  ?

Mobile Number  ?

Fax  ?

Email  ?

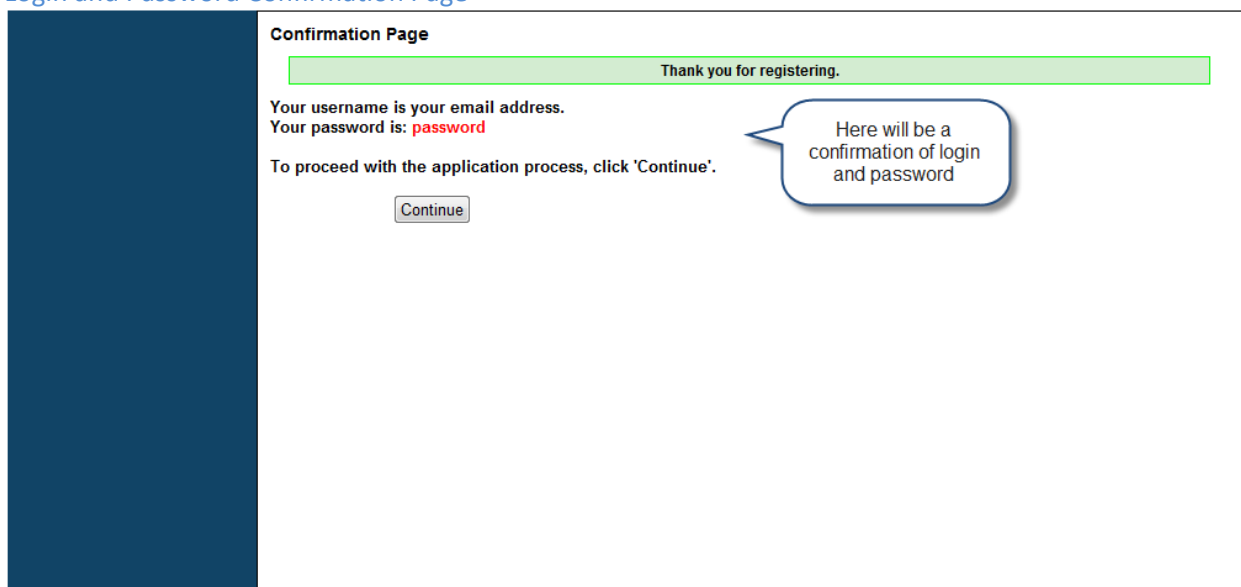
Organization Information

Proceed to enter password and finish registration

## Entering a Password

1. After you have registered your account, you will be taken to a Set Password Page where you will enter your password.
  - a. After entering the passwords click save
2. Next you will confirm the password in Red. If you wish to change your password, log on to your account and click on Edit Contact. This will allow you to change your information.

## Login and Password Confirmation Page



The screenshot shows a 'Confirmation Page' with a dark blue sidebar on the left. The main content area has a green header bar that says 'Thank you for registering.' Below this, the text reads: 'Your username is your email address. Your password is: password'. A speech bubble on the right says 'Here will be a confirmation of login and password'. At the bottom, there is a 'Continue' button and the instruction: 'To proceed with the application process, click 'Continue''.

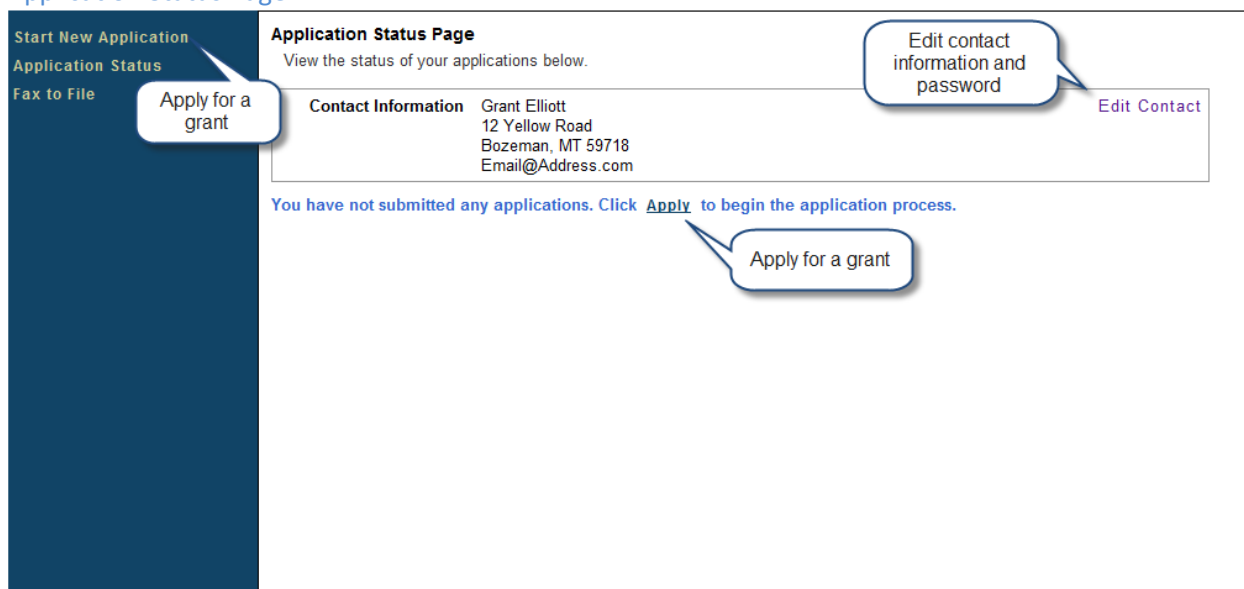
# Applicant Tutorial

## Applicant Status Page

After you have registered your account you will be directed to the Application Status Page.

1. Start New Application – This allows you to review the available grants and apply.
2. Application Status – This is your homepage where you can check on the status of your grants. This page will display the form you just filled out, what its status is, and what the next form will be.
3. Fax to File – Instead of scanning a document you can fax it to your computer. Using Fax to File helps shrink documents to a smaller file size.

## Application Status Page



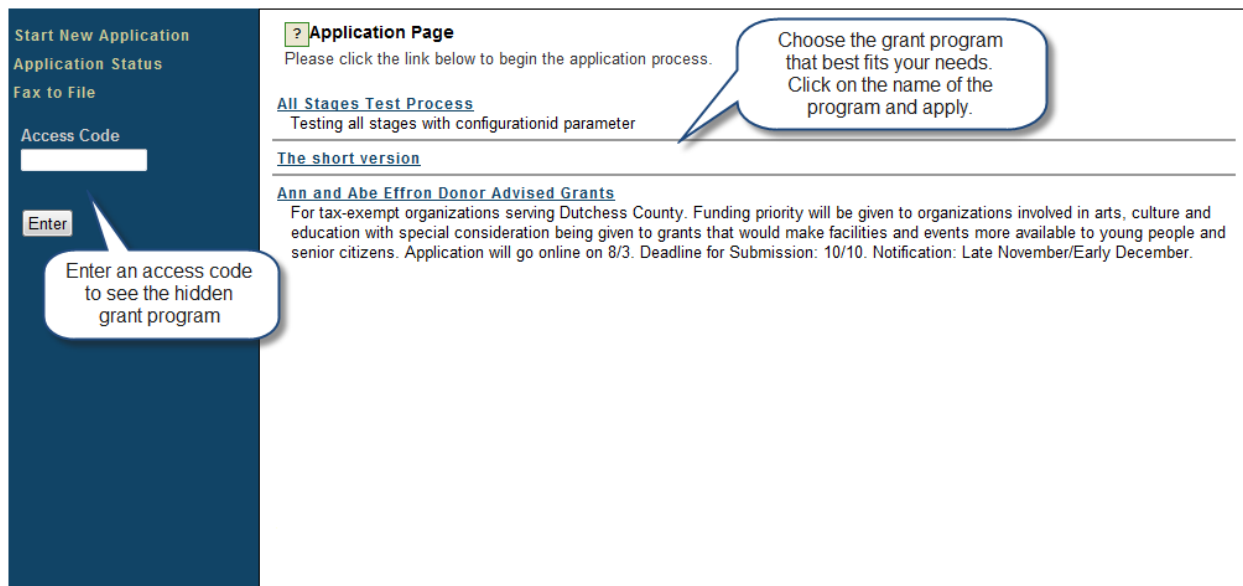
The screenshot shows the 'Application Status Page' interface. On the left is a dark blue sidebar with three menu items: 'Start New Application', 'Application Status', and 'Fax to File'. The 'Application Status' item is highlighted with a white callout bubble that says 'Apply for a grant'. The main content area has a title 'Application Status Page' and a subtitle 'View the status of your applications below.'. Below this is a 'Contact Information' section with the following text: 'Grant Elliott', '12 Yellow Road', 'Bozeman, MT 59718', and 'Email@Address.com'. To the right of this section is a purple link labeled 'Edit Contact', with a callout bubble above it that says 'Edit contact information and password'. Below the contact information is a message: 'You have not submitted any applications. Click [Apply](#) to begin the application process.'. A callout bubble points to the 'Apply' link with the text 'Apply for a grant'.

## Choosing a Grant Program

After clicking on the Start New Application link you will have the ability to choose a grant program to apply for. Each grant program will have a brief description of the grant or who qualifies for the grant. Read these descriptions thoroughly before applying.

- 1) Read through the grant program description to decide if you qualify to apply for the grant.
  - a. If the foundation has sent you an access code enter it in the Access Code box on the left and click Enter. This will allow your private grant program to appear.
- 2) After the grant program appears, click it to start filling out the first form.
  - a. Grant Programs have the ability for multiple forms. Some grant programs can have the applicant submit 3 forms to the foundation before a decision is made. Each form will be filled out and submitted to the foundation. After it is deemed complete, the foundation will approve you to move on to the next form.

## Choosing a Grant Program



The screenshot shows a web interface for starting a new application. On the left, a dark blue sidebar contains the following text: "Start New Application", "Application Status", "Fax to File", "Access Code" (with an empty input field), and "Enter" (with a button). A callout bubble points to the "Enter" button, containing the text: "Enter an access code to see the hidden grant program".

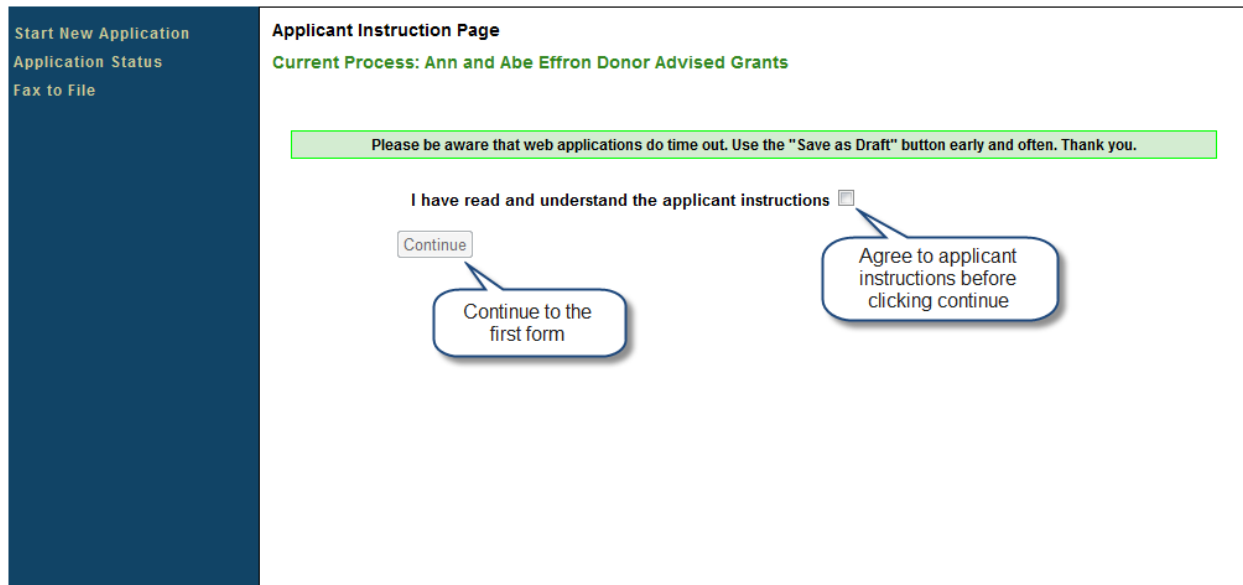
The main content area is titled "? Application Page" and includes the instruction: "Please click the link below to begin the application process." Below this are three links: "All Stages Test Process" (with subtext "Testing all stages with configurationid parameter"), "The short version", and "Ann and Abe Efron Donor Advised Grants" (with subtext "For tax-exempt organizations serving Dutchess County. Funding priority will be given to organizations involved in arts, culture and education with special consideration being given to grants that would make facilities and events more available to young people and senior citizens. Application will go online on 8/3. Deadline for Submission: 10/10. Notification: Late November/Early December."). A callout bubble points to the "All Stages Test Process" link, containing the text: "Choose the grant program that best fits your needs. Click on the name of the program and apply."

# Applicant Tutorial

## Applicant Instruction Page

- 1) For security risks, our software automatically logs you off if there is no activity on the system for over a 40 minute time period. Please click Save as Draft early and often.
  - a. Click the box stating that you understand the applicant instructions and then click Continue.

## Agree to the Applicant Instructions



The screenshot shows a web application interface. On the left is a dark blue sidebar with the following menu items: "Start New Application", "Application Status", and "Fax to File". The main content area is titled "Applicant Instruction Page" and shows the "Current Process: Ann and Abe Effron Donor Advised Grants". A green banner at the top of the main area contains the text: "Please be aware that web applications do time out. Use the 'Save as Draft' button early and often. Thank you." Below this banner is a checkbox labeled "I have read and understand the applicant instructions". To the left of the checkbox is a "Continue" button. A callout bubble points to the "Continue" button with the text "Continue to the first form". Another callout bubble points to the checkbox with the text "Agree to applicant instructions before clicking continue".

## Filling out the First Form

After agreeing to the applicant instructions you will be sent to the first form in the grant program. Enter all the applicable information then Save as Draft or Submit the form to the foundation.

- 1) Start filling out the questions on the form, paying close attention to the instructions and limitations on each question.
  - a. Certain types of questions have limitations set by the foundations. Text questions will have a character limit which only allows you to type or paste a certain amount of text in each question. Another limit will be on the file upload questions. This limit will be in Mega Bytes (MB). The size of file you are uploading must be under the amount of MB's allowed on the question.
- 2) Applicants can save as draft and come back to the form after any given time to complete it. The foundation will not check for completeness until the form is submitted.
  - a. After the application is submitted there will be a confirmation page stating that the form has been submitted. You can always refer to your Application Status Page to see what stage the application is in, if in doubt.

(See diagram on next page)

## Completing a Form


Start New Application  
Application Status  
Fax to File

### Qualification Page

Current Process: All Stages Test Process

To avoid losing your work, please [Save As Draft](#) a minimum of once per hour.

\* = Required Field

 [Print Question Legend](#)

Printing will convert the form to a PDF for printing

 [Print Packet](#)

<b>Contact Information</b>	Grant Elliott 12 Yellow Road Bozeman, MT 59718 Email@Address.com	<a href="#">Edit Contact</a>
----------------------------	---	------------------------------

**Project Name\***  ?

**Not-For-Profit\*** Is your organization a non profit organization?  
 Yes ?  
 No

**Employees\*** How many people are employed by your organization?  
 ?

**Budget\*** Please upload the project budget.  
 ? [Browse...](#)  
[File Upload Status: No file uploaded.]

File size limit [1 MB(s) allowed]

**Request\*** What is the amount of the request?  
 ?

**Date\*** When will the funds be needed?  
 ?

**Project\*** Briefly describe the proposed project.  
 ?  
[500 characters left]

Character Limit

Save form and keep working

[Save As Draft](#)

[Cancel](#)

[Submit Form](#)

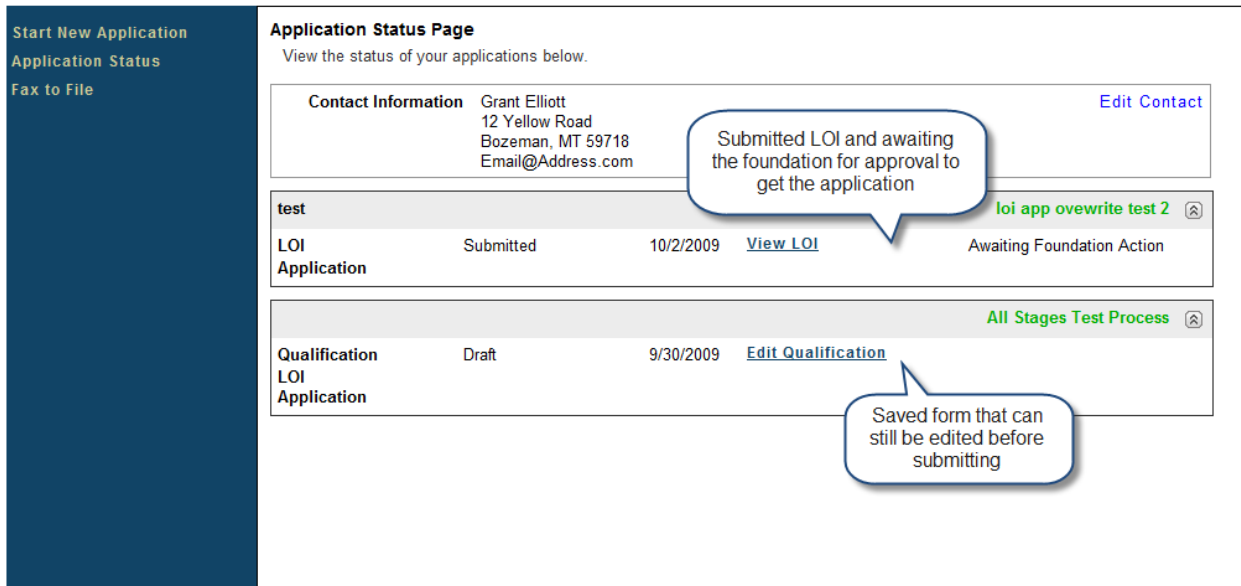
Submit form to the foundation

## Accessing Forms After Save and Submit

The Application Status Page is where you can check on the status of your applications and access for historical record keeping. The Application Status Page is your homepage. You will be automatically directed there when you login.

1. If you've submitted the grant then you can only view the grant and print it.
2. If you saved the form then you can Edit the saved form from the Application Status Page.

## Application Status Page



The screenshot shows the 'Application Status Page' with a dark blue sidebar on the left containing links: 'Start New Application', 'Application Status', and 'Fax to File'. The main content area is titled 'Application Status Page' and includes the instruction 'View the status of your applications below.' Below this is a 'Contact Information' box for Grant Elliott at 12 Yellow Road, Bozeman, MT 59718, with an 'Email@Address.com' and an 'Edit Contact' link. A table lists two applications:

test		loi app overwrite test 2	
LOI Application	Submitted	10/2/2009	Awaiting Foundation Action
		<a href="#">View LOI</a>	

All Stages Test Process	
Qualification LOI Application	Draft
9/30/2009	
<a href="#">Edit Qualification</a>	

Two callout boxes provide additional context: one points to the 'Submitted' status of the first application, stating 'Submitted LOI and awaiting the foundation for approval to get the application', and another points to the 'Draft' status of the second application, stating 'Saved form that can still be edited before submitting'.