

Applicant Tutorial



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.

Applicant Tutorial

Registration Page

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

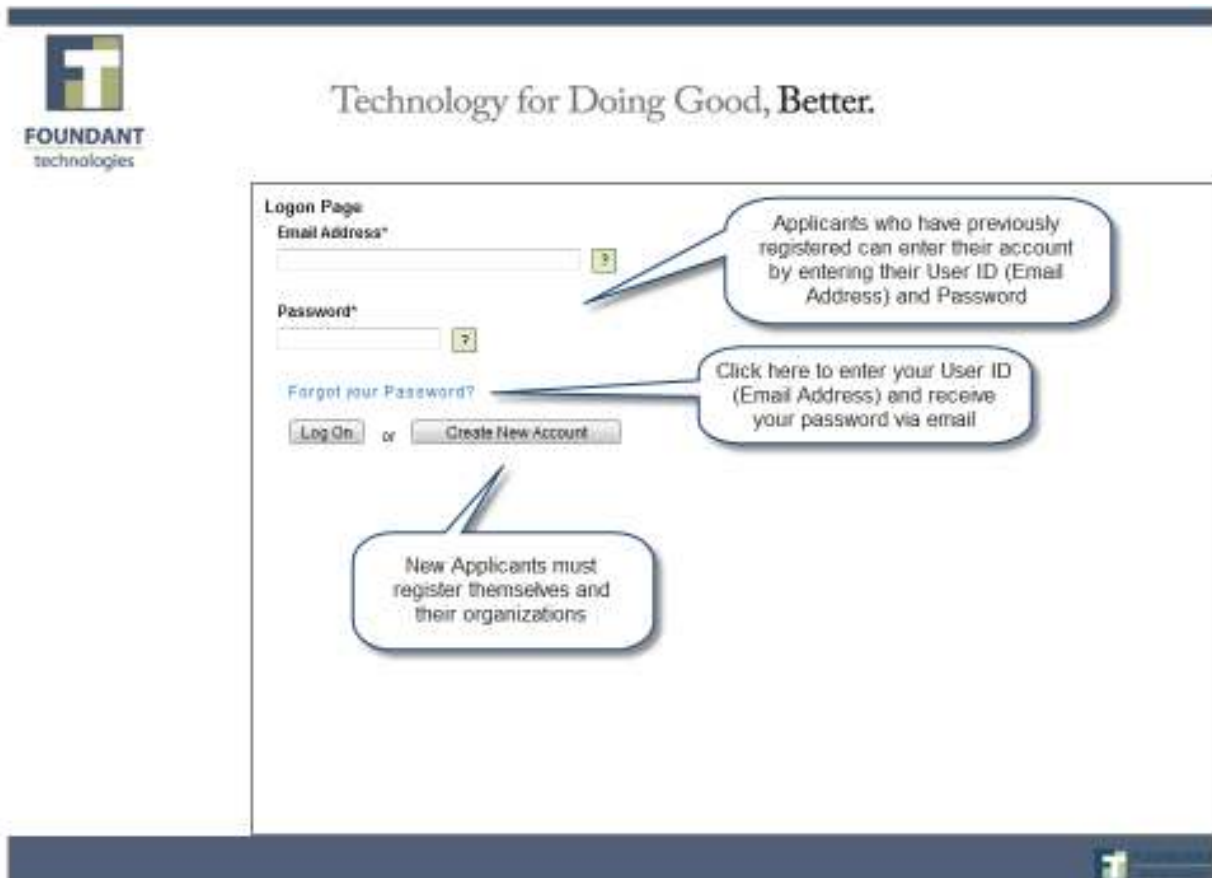
1. Enter your login, which is your e-mail address, in the login field
2. Enter the Password that you chose when you set up your account.
3. Press the “Log On” button to enter the Grant Lifecycle Manager.

If you have forgotten your password;

4. You can click on the Forgot your Password link, 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.



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.

Applicant information

Salutation	E-Mail / Login*
<input type="text"/>	<input type="text"/>
First Name*	Address 1*
<input type="text"/>	<input type="text"/>
Middle Name	Address 2
<input type="text"/>	<input type="text"/>
Last Name*	City*
<input type="text"/>	<input type="text"/>
Suffix	State/Province*
<input type="text"/>	<input type="text"/>
Business Title	Postal Code*
<input type="text"/>	<input type="text"/>
Telephone Number	Country
<input type="text"/>	<input type="text"/>
Fax Number	
<input type="text"/>	
Mobile Number	
<input type="text"/>	

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

Organization information

Organization Name*

Tax ID/Registered Charity Number* ?

Web Site

Salutation	E-Mail / Login
<input type="text"/>	<input type="text"/>
First Name*	Address 1
<input type="text"/>	<input type="text"/>
Middle Name	Address 2
<input type="text"/>	<input type="text"/>
Last Name*	City
<input type="text"/>	<input type="text"/>
Suffix	State/Province
<input type="text"/>	<input type="text"/>
Business Title	Postal Code
<input type="text"/>	<input type="text"/>
Telephone Number	Country
<input type="text"/>	<input type="text"/>
Fax Number	
<input type="text"/>	
Mobile Number	
<input type="text"/>	

Proceed to enter password and finish registration

Proceed to Next Step Cancel

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. 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.

Applicant Status Page

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

1. Apply – This allows you to review the available grants and apply.
2. Dashboard – 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



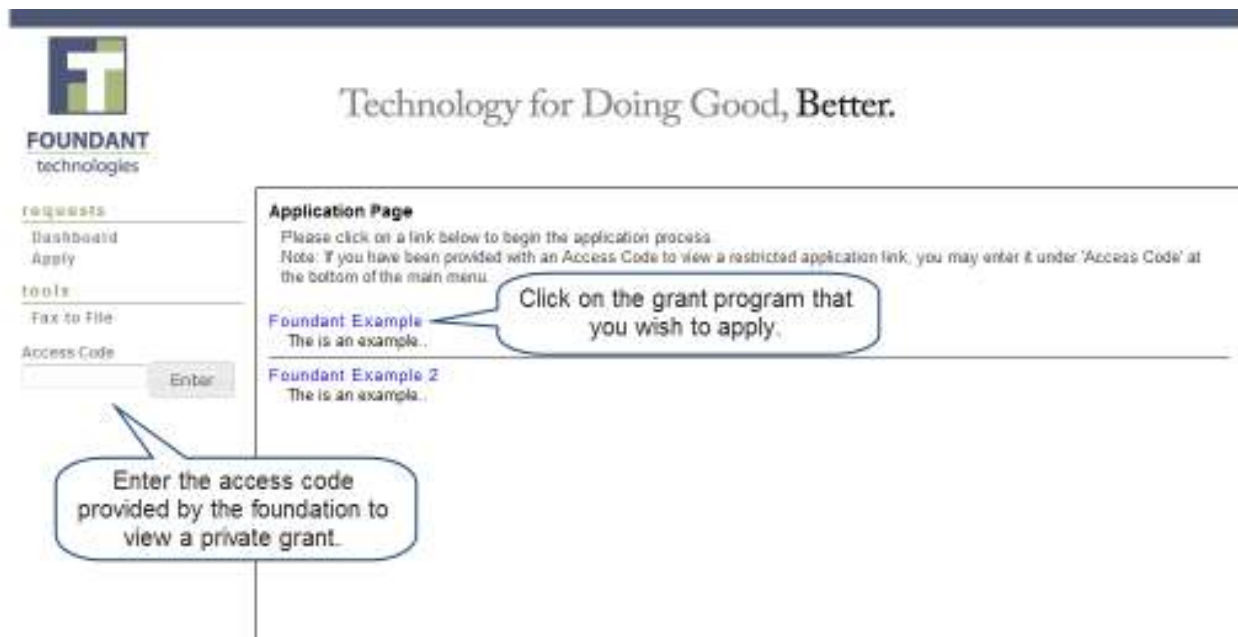
Choosing a Grant Program

After clicking on the Apply 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.

Applicant Tutorial

- 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 the FOUNDANT technologies website interface. The header includes the logo and the tagline "Technology for Doing Good, Better." The left sidebar contains navigation links for "requests" (Dashboard, Apply) and "tools" (Fax to File, Access Code). The main content area is titled "Application Page" and contains instructions to click on a link to begin the application process, with a note about using an Access Code. Below the instructions are two example links: "Foundant Example" and "Foundant Example 2". Two callout boxes provide additional guidance: one points to the "Enter" button and says "Enter the access code provided by the foundation to view a private grant.", and another points to the "Foundant Example" link and says "Click on the grant program that you wish to apply."

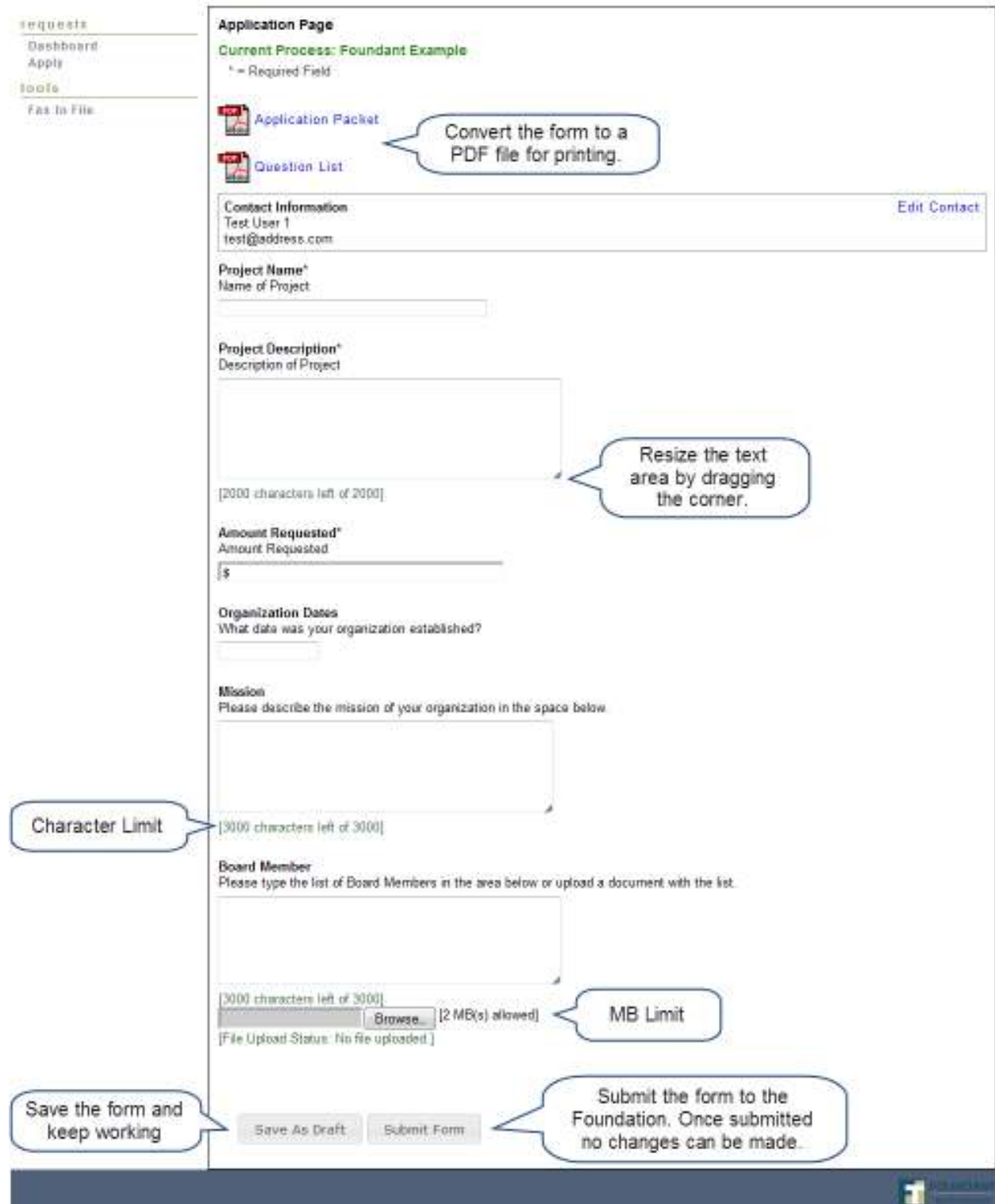
Filling out the First Form

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



requests
Dashboard
Apply
tools
Fast In File

Application Page
Current Process: Foundant Example
* = Required Field

 Application Packet Convert the form to a PDF file for printing.

 Question List

Contact Information Edit Contact
Test User 1
test@address.com

Project Name*
Name of Project

Project Description*
Description of Project

[2000 characters left of 2000] Resize the text area by dragging the corner.

Amount Requested*
Amount Requested
\$

Organization Dates
What date was your organization established?

Mission
Please describe the mission of your organization in the space below.

[3000 characters left of 3000] Character Limit

Board Member
Please type the list of Board Members in the area below or upload a document with the list.

[3000 characters left of 3000] MB Limit
 [2 MB(s) allowed]
[File Upload Status: No file uploaded.]

Save the form and keep working Submit the form to the Foundation. Once submitted no changes can be made.

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