

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 90 minutes, you will be logged off for security reasons. The system will auto save as you move from question to the next, and will save every 100 characters in longer text responses. Auto save is noted by the border of the question highlighting in green

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 **Email Address** 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;

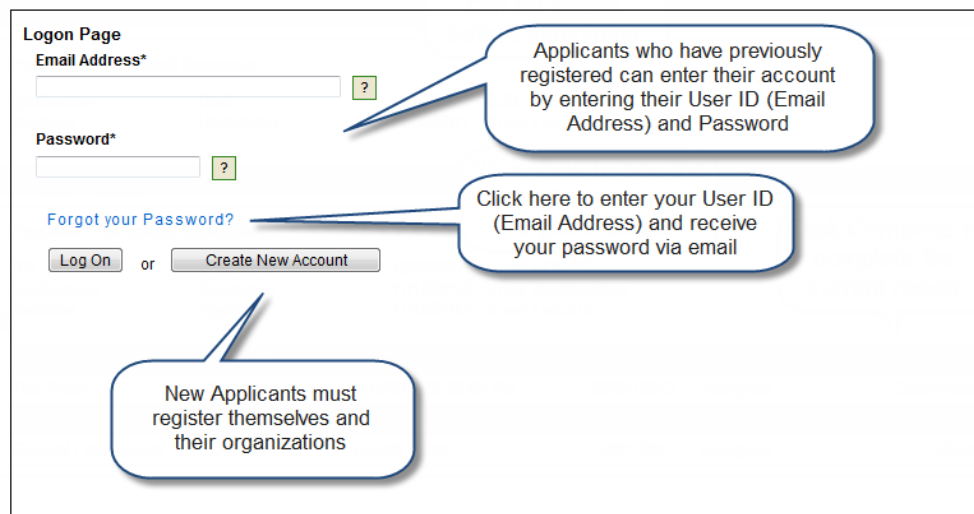
- You can click on the **Forgot your Password** link, enter your User ID, and the system will email your password to your e-mail account.

If you do not have an existing account;

- Click on **Create New Account** to register.



Technology for Doing Good, **Better.**



Logon Page

Email Address* ?

Password* ?

[Forgot your Password?](#)

or

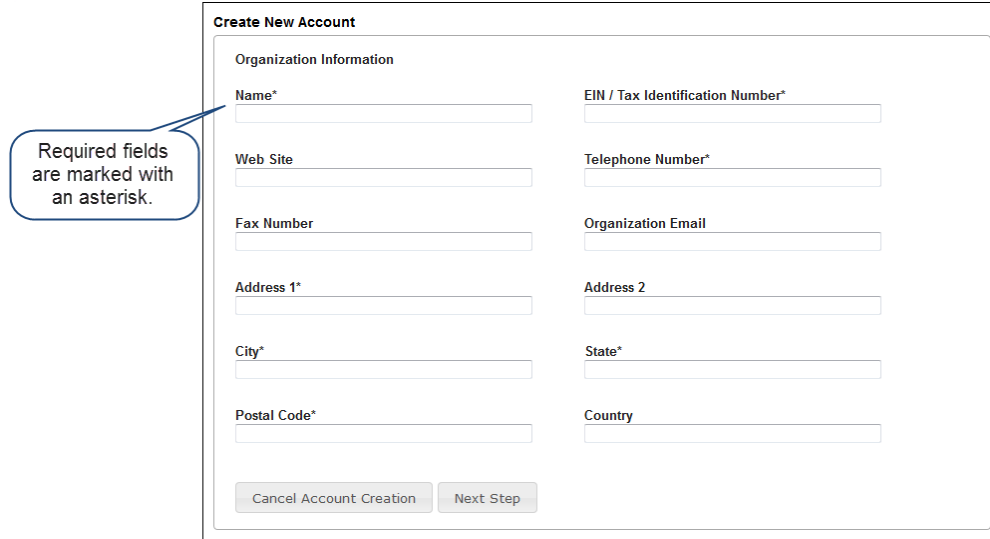
Applicants who have previously registered can enter their account by entering their User ID (Email Address) and Password

Click here to enter your User ID (Email Address) and receive your password via email

New Applicants must register themselves and their organizations

To register an account

1. Click on **Create New Account**
2. Enter your organization information

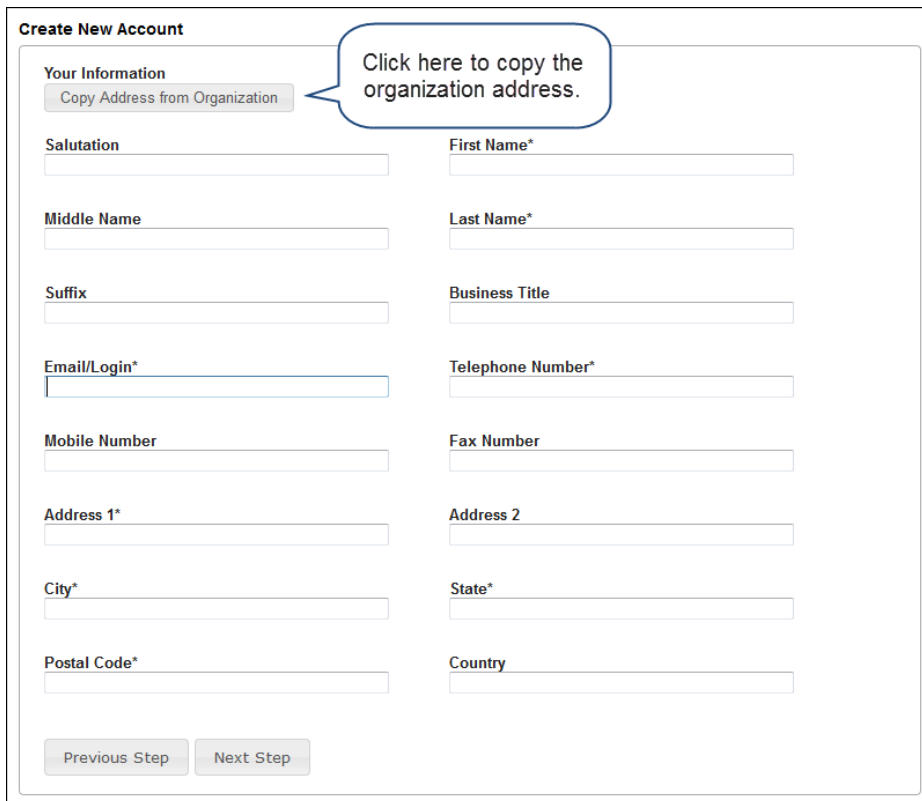


Create New Account

Organization Information

Name*	EIN / Tax Identification Number*
Web Site	Telephone Number*
Fax Number	Organization Email
Address 1*	Address 2
City*	State*
Postal Code*	Country

3. Click on the Next Step button
4. Enter your contact information



Create New Account

Your Information

Salutation	First Name*
Middle Name	Last Name*
Suffix	Business Title
Email/Login*	Telephone Number*
Mobile Number	Fax Number
Address 1*	Address 2
City*	State*
Postal Code*	Country

Applicant Tutorial

- 5. Click on the Next Step button
- 6. Indicate whether or not you are the organization's executive

Create New Account

Executive Officer

Are you the Organization's Executive Officer?*

Yes

No

- 7. Click on the Next Step button
- 8. Enter the organization executive information

Create New Account

Additional Executive Officer Information

Click here to copy the organization address.

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

Applicant Tutorial

9. Click on the Next Step button
10. Enter your password

Create New Account

Password

Password*

Confirm Password*

11. Click on the Finish button
12. Confirm that you received your registration email from the system. It is important to make sure you can receive emails, as this will be a method of communication from the organization.

NOTE: You will be receiving emails from this system about your request. To ensure you receive emails from this system we have sent you an email to confirm your account was created successfully. If you do not see an email from, 'Administrator (administrator@grantinterface.com)', look in your junk or spam folder. To remove 'Administrator (administrator@grantinterface.com)' from your spam filter, use the link below.

[Click Here](#) for a tutorial about removing email addresses from spam filters.

I have received the email
 Continue without checking

Once, you have received the email, click and then continue on.

click here if you did not receive the email, to find steps on how to add it to your to your safe sender list

this is the email address for the system

Applicant Status Page

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



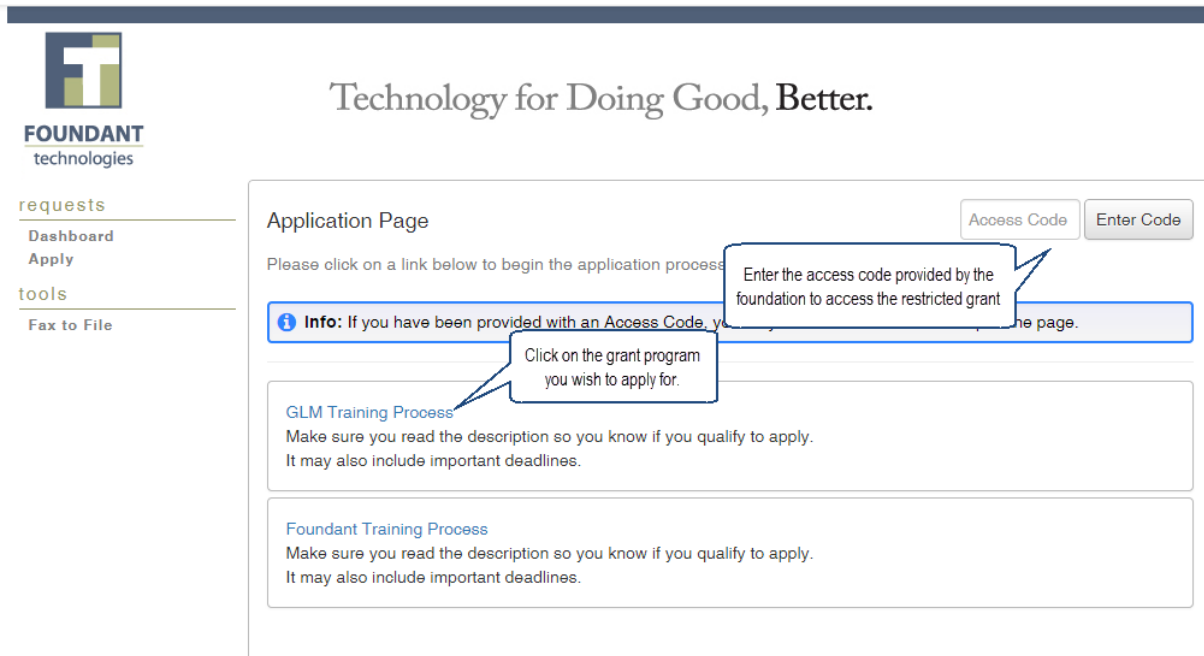
The screenshot shows the 'Application Status Page' for 'XYZ Foundation'. The page header includes the organization name, the user's name 'cory brester', and a dropdown menu with 'Edit Profile' and 'Sign Out' options. The main content area displays contact information for 'cory brester' (123 abo drive, Bozeman, MT 59718, 111-111-2222, cory@test.com) and organization information (XYZ Foundation, 123 abo drive, Bozeman, MT 59718, 555-555-5555, 12-1234567, www.google.com). There are three informational messages: one about incorrect organization information, one about not submitting any applications, and one about the access code. Callouts point to 'Your Organization Information', 'Edit your contact information & password', 'apply for a grant', and 'Make sure you organization information is accurate, if not'.

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.

- 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 In the upper right corner and click "Enter Code." This will allow only the 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.

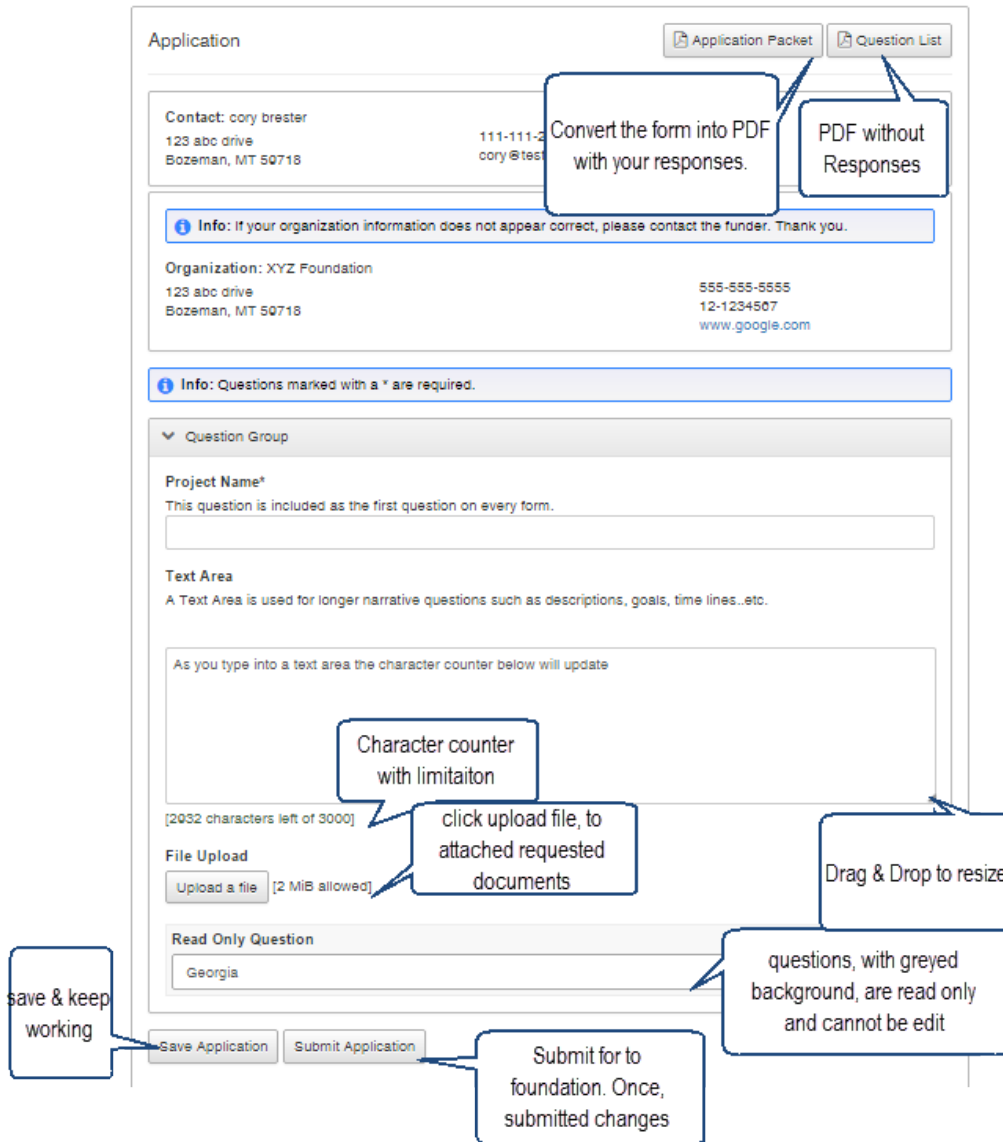


Filling out the First Form

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.



The screenshot shows an application form interface with several callouts:

- Application Packet** and **Question List** buttons at the top right.
- Contact:** cory brester, 123 abc drive, Bozeman, MT 50718, 111-111-2 cory@test
- Info:** If your organization information does not appear correct, please contact the funder. Thank you.
- Organization:** XYZ Foundation, 123 abc drive, Bozeman, MT 50718, 555-555-5555, 12-1234507, www.google.com
- Info:** Questions marked with a * are required.
- Question Group:** Project Name* (This question is included as the first question on every form.)
- Text Area:** A Text Area is used for longer narrative questions such as descriptions, goals, time lines, etc. Includes a character counter: [2032 characters left of 3000].
- File Upload:** Upload a file [2 MiB allowed].
- Read Only Question:** Georgia (greyed background).
- Buttons:** Save Application, Submit Application.

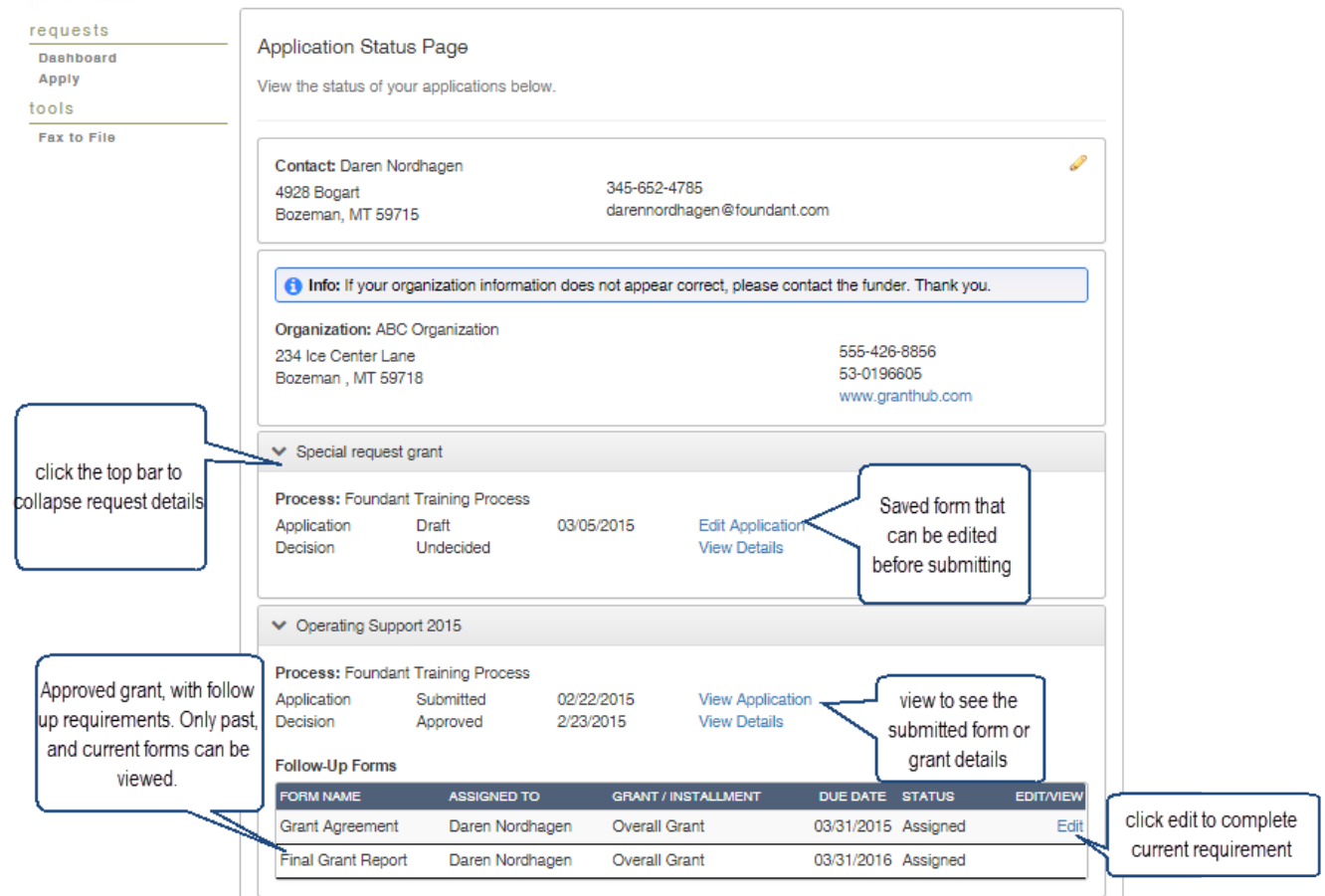
Callouts provide additional instructions:

- Convert the form into PDF with your responses.** (points to the top right buttons)
- PDF without Responses** (points to the top right buttons)
- Character counter with limitaiton** (points to the character counter)
- click upload file, to attached requested documents** (points to the file upload button)
- Drag & Drop to resize** (points to the text area)
- questions, with greyed background, are read only and cannot be edit** (points to the read only question)
- Submit for to foundation. Once, submitted changes** (points to the submit application button)
- save & keep working** (points to the save application button)

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



The screenshot shows the 'Application Status Page' with a sidebar on the left containing 'requests', 'Dashboard', 'Apply', 'tools', and 'Fax to File'. The main content area is titled 'Application Status Page' and includes contact information for Daren Nordhagen, an organization profile for ABC Organization, and a list of applications. Callouts provide the following instructions:

- 'click the top bar to collapse request details' points to the 'Special request grant' header.
- 'Saved form that can be edited before submitting' points to the 'Draft' status application.
- 'view to see the submitted form or grant details' points to the 'Submitted' status application.
- 'Approved grant, with follow up requirements. Only past, and current forms can be viewed.' points to the 'Approved' status application.
- 'click edit to complete current requirement' points to the 'Edit' link in the 'Follow-Up Forms' table.

FORM NAME	ASSIGNED TO	GRANT / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Grant Agreement	Daren Nordhagen	Overall Grant	03/31/2015	Assigned	Edit
Final Grant Report	Daren Nordhagen	Overall Grant	03/31/2016	Assigned	

Viewing Decision Details

The Decision Details Page is where you can view the details of your grant and scheduled payments.

All organization may not have this viewable to applicants

1. If the request is Undecided there will be no Payment Summary.
2. If the request is Denied the Grant Amount will be \$0.00 and the Grant Type will be Denied.
3. If the Grant was approved you can click View Details to see Grant Amount, Grant Type (One Time, Installment or Matching) & Payment Schedule.

Application Process Status - Follow Up Draft

STAGE	STATUS	INITIAL SUBMISSION	
Application	Complete	02/22/2015	View

STAGE	DECISION TYPE	DECISION DATE
Decision	One Time	02/23/2015

Payment Summary

Grant Amount: \$2,500.00
Grant Type: One Time
Due: 02/28/2015

PAYMENT DATE	PAYMENT AMOUNT
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Annotations:

- Total Amount of Grant (points to \$2,500.00)
- Date of Grant (points to 02/23/2015)
- Type of grant (points to One Time)
- Payment Details (points to the Payment Summary section)