

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;

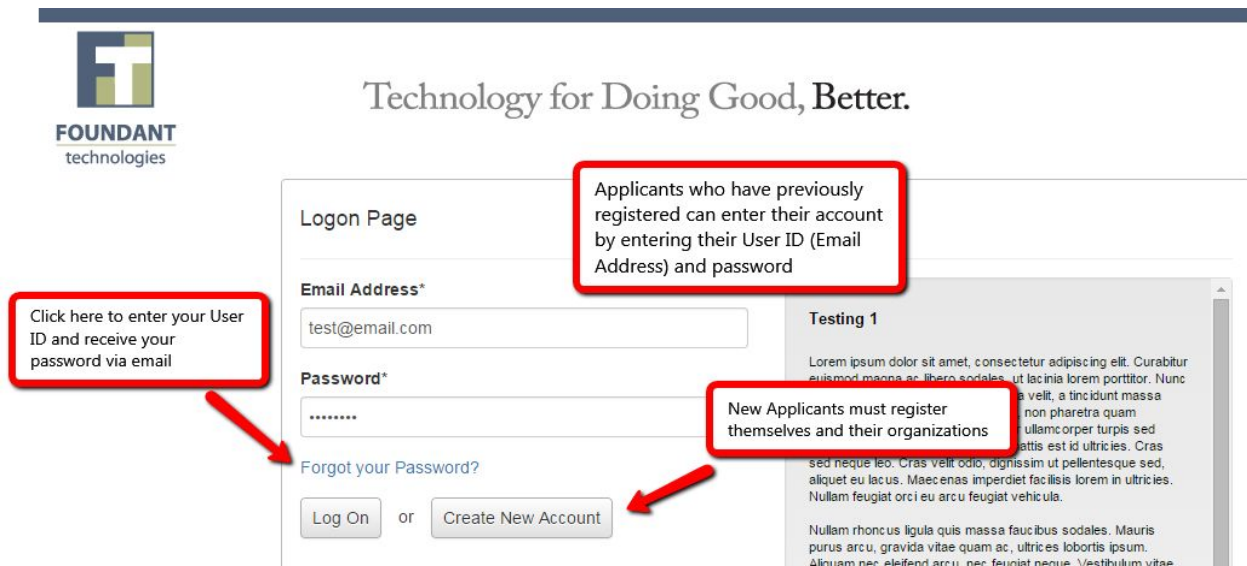
1. Enter your **Login**, which is your e-mail address, in the **Email Address** field.
2. Enter the **Password** that you chose when you set up your account.
3. Press the “**Log On**” button to enter the Grant Lifecycle Manager.

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.



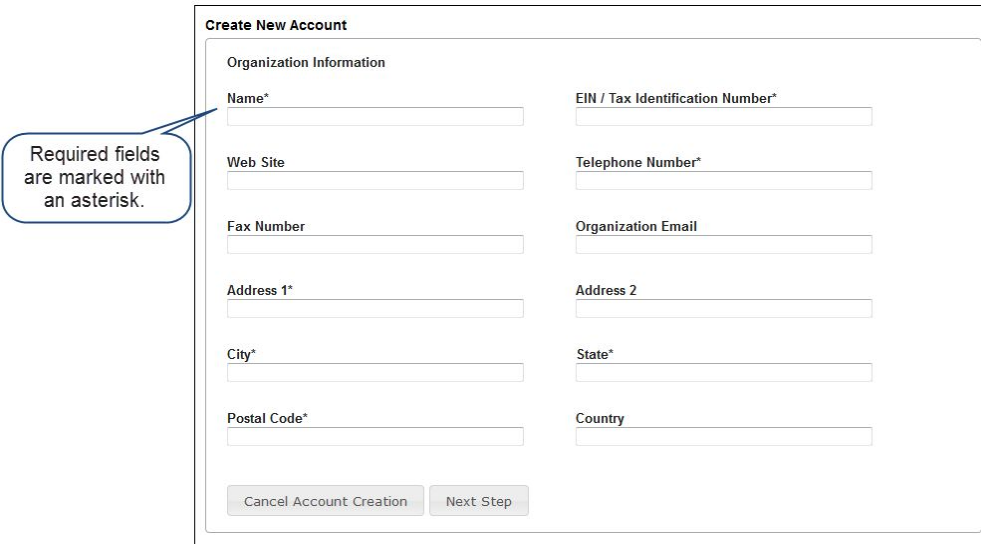
The screenshot shows the login page with the following elements and annotations:

- Foundant Technologies Logo:** Located in the top left corner.
- Header:** "Technology for Doing Good, Better."
- Form Title:** "Lolon Page"
- Email Address*:** Input field containing "test@email.com".
- Password*:** Input field with masked characters ".....".
- Forgot your Password?:** Link with a red arrow pointing to it from the annotation: "Click here to enter your User ID and receive your password via email".
- Log On or Create New Account:** Two buttons at the bottom of the form.
- Testing 1:** A scrollable area containing placeholder text. A red box highlights the text: "New Applicants must register themselves and their organizations".
- Annotation:** A red box above the form states: "Applicants who have previously registered can enter their account by entering their User ID (Email Address) and password".

Creating an Account

1. Click on **Create New Account**

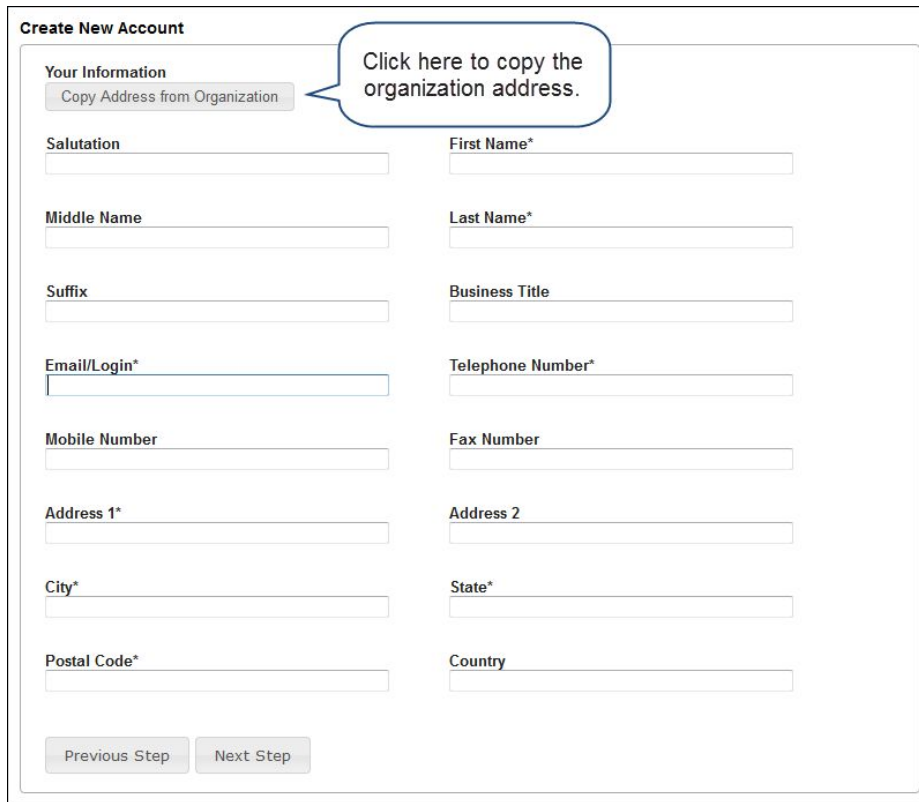
2. Enter your **Organization Information**



Required fields are marked with an asterisk.

3. Click on the **Next Step** button

4. Enter **Your (Applicant) Contact Information**



Click here to copy the organization address.

5. Click on the **Next Step** button

6. Indicate whether or not you are the **Organization's Executive Officer**

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 Officer 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. Set your password

Create New Account

Password

Password*

Confirm Password*

Previous Step Finish

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 \(administrator@grantinterface.com\)**](mailto: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

Continue Send Email Again

If you did not receive the email, Click Here to learn how to adjust your spam filter.

Click Here if you received the email

Click here to continue without checking. (Not Recommended!)

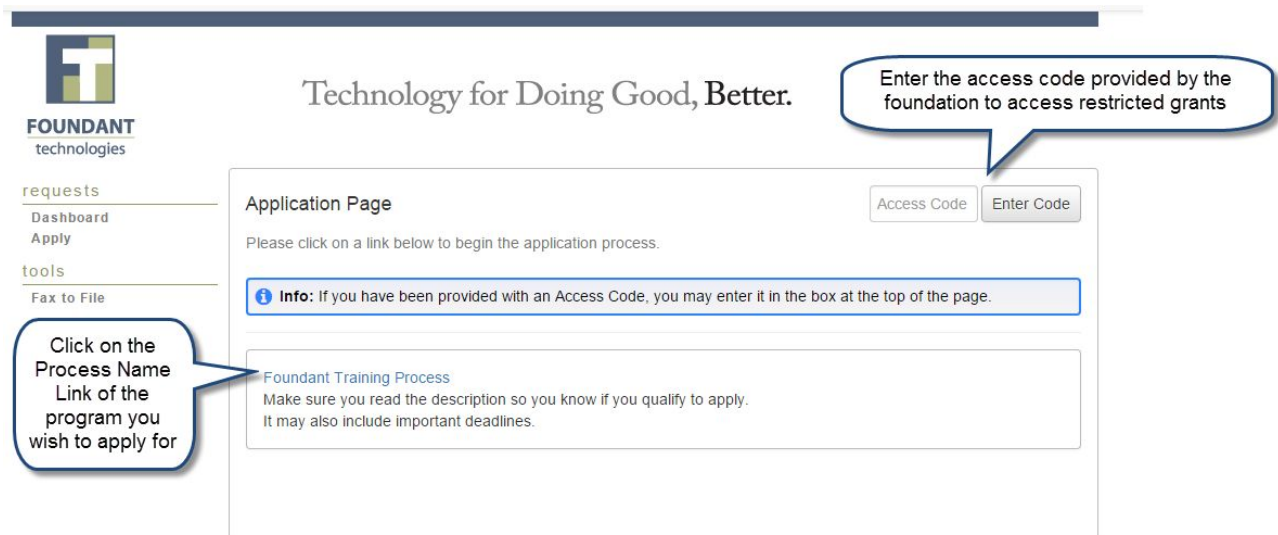
All email from the system will come from this address.

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.

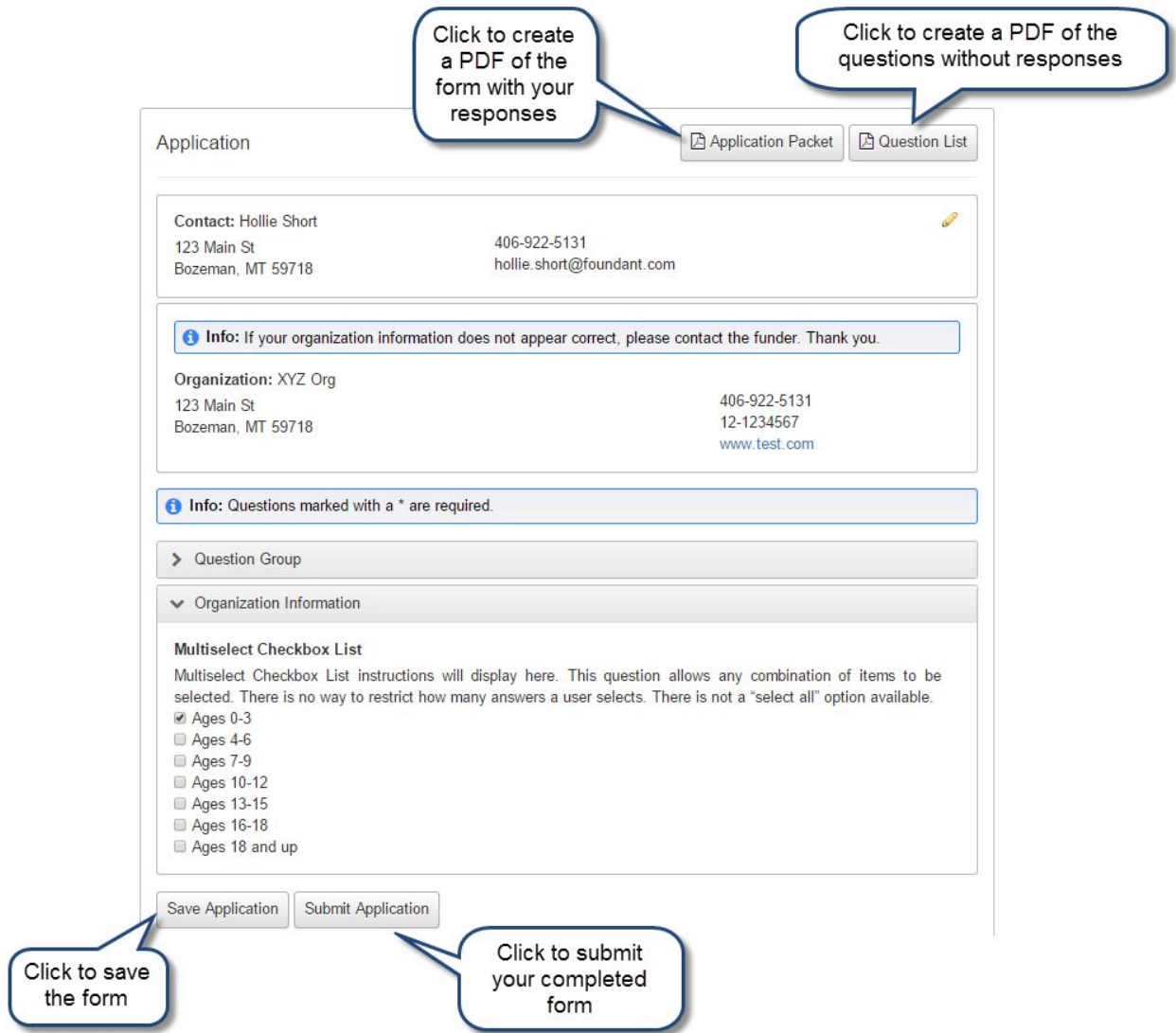
- a. If the foundation has sent you an access code enter it in the Access Code box in the upper right corner and click “Enter Code.” This will allow only the private grant program to appear.
- 2) After the grant program appears, click it to start filling out the first form.
- a. Grant Programs have the 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.



Application

Application Packet Question List

Contact: Hollie Short
123 Main St
Bozeman, MT 59718

406-922-5131
hollie.short@foundant.com

Info: If your organization information does not appear correct, please contact the funder. Thank you.

Organization: XYZ Org
123 Main St
Bozeman, MT 59718

406-922-5131
12-1234567
www.test.com

Info: Questions marked with a * are required.

> Question Group

Organization Information

Multiselect Checkbox List
Multiselect Checkbox List instructions will display here. This question allows any combination of items to be selected. There is no way to restrict how many answers a user selects. There is not a "select all" option available.

- Ages 0-3
- Ages 4-6
- Ages 7-9
- Ages 10-12
- Ages 13-15
- Ages 16-18
- Ages 18 and up

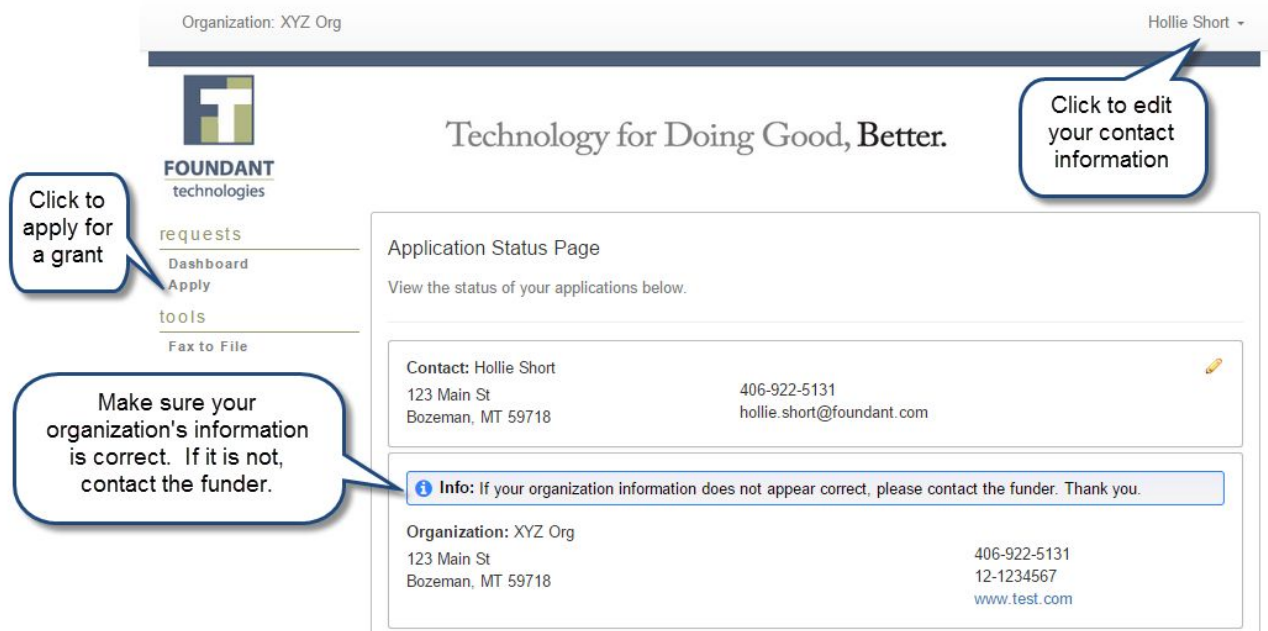
Save Application Submit Application

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.

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 Applicant Status Page for an organization named XYZ Org. The page header includes the organization name and the user's name, Hollie Short. The Foundant Technologies logo and tagline "Technology for Doing Good, Better." are prominently displayed. A navigation menu on the left lists "requests" (with sub-items "Dashboard" and "Apply"), "tools", and "Fax to File". A callout bubble points to the "Apply" link, stating "Click to apply for a grant". Another callout bubble points to the user's name in the top right, stating "Click to edit your contact information". The main content area is titled "Application Status Page" and contains a section for contact information. This section displays the user's contact details: "Contact: Hollie Short", "123 Main St", "Bozeman, MT 59718", "406-922-5131", and "hollie.short@foundant.com". Below this is an information box with a blue header that reads: "Info: If your organization information does not appear correct, please contact the funder. Thank you." The bottom section of the page displays the organization's information: "Organization: XYZ Org", "123 Main St", "Bozeman, MT 59718", "406-922-5131", "12-1234567", and "www.test.com". A callout bubble points to the organization's contact information, stating: "Make sure your organization's information is correct. If it is not, contact the funder."

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.

Application Status Page
View the status of your applications below.

Contact: Daren Nordhagen
4928 Bogart 345-652-4785
Bozeman, MT 59715 darenordhagen@foundant.com

Info: If your organization information does not appear correct, please contact the funder. Thank you.

Organization: ABC Organization
234 Ice Center Lane 555-426-8856
Bozeman, MT 59718 53-0196605
www.granithub.com

Special request grant

Process: Foundant Training Process

Application	Draft	03/05/2015	Edit Application
Decision	Undecided		View Details

Operating Support 2015

Process: Foundant Training Process

Application	Submitted	02/22/2015	View Application
Decision	Approved	2/23/2015	View Details

Follow-Up Forms

FORM NAME	ASSIGNED TO	GRANT / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Grant Agreement	Daren Nordhagen	Overall Grant	04/01/2015	Assigned	Edit
Final Grant Report	Daren Nordhagen	Overall Grant	05/01/2016	Assigned	

Click to collapse the details of this request

Click to edit the form

Click to view the form

Click to view the details of the decision

Names of follow up forms 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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