

## VIDEO 1: Site Access & Account Creation

You will access the system via the log on page. The Foundation may have provided you with a link to this page, or it may be hyperlinked on their Foundation website. It's recommend that you bookmark this page in your internet browser for ease of access. If you've already created an account you may enter your email and password and log right in. Otherwise you'll want to click on the Create New Account button. If at any time after creating an account, you can't remember your password, you may click on the Forgot Your Password button, enter your email address and will be sent a link to reset your password.



### Logon Page

A screenshot of the logon page for the Foundation's online grant portal. The page features a login form with two input fields: 'Email Address\*' and 'Password\*'. Below the fields are three buttons: 'Log On' (blue), 'Create New Account' (white), and 'Forgot your Password?' (blue). Two yellow arrows point to the 'Create New Account' and 'Forgot your Password?' buttons. To the right of the form is a grey box containing instructions for new and existing users, and a note about contacting the administrator if the user is unsure if they are registered. The background of the page has a repeating 'DEMO' watermark.

**Email Address\***

**Password\***

[Log On](#) [Create New Account](#) [Forgot your Password?](#)

**Welcome to the Foundation's online grant portal.**

**New Users:** Please click on "Create New Account" to complete the registration process and create your logon credentials.

**Existing Users:** Please enter your credentials and log in. If you forgot your password, please use the "Forgot your Password" link to the left to reset your password.

**Not Sure?** If you think that you have already registered in the system, do not create a new account. Please contact our Administrator, at [example@email.com](mailto:example@email.com) to receive your username and password.

### CREATE NEW ACCOUNT:

- Creating a new account is a multi-step process;
  - with the first section collecting **Organization Information**;
  - the second section collecting **User Information**;
  - and sections three and four collecting **Executive Officer** information.
- After Organization Information has been entered click on the **"Next"** button.
- The next section is the **"User Information"** section, or YOUR information.
  - If your address is the same as your organization you may use the **"Copy Address from Organization"** button to automatically pull the address information from the organization address fields into the address fields in this section.
  - It is very important to note that the email address entered in the **email/username** field becomes the Applicant's **Username** in the system.
- Once the fields on the **"User Information"** section are completed, click on the **"Next"** button.
  - Please note that should you need to navigate to previous section in the registration process, you must use the **"Previous"** button at the bottom of each section in order for the information entered in registration fields to remain intact. If you attempt to navigate

to the previous section by using their browser's "back" button you will lose all registration information entered..

- In the next section you indicate if you are the Organization's Executive Officer.
  - If you are the executive officer select "**Yes.**" You are taken to a section of optional fields that includes only the fields that were not required in the "User Information" section.
  - If you are not the executive officer select "**No,**" and complete the Executive Officer's fields.
- Once the executive officer's information entered, clicking on the "**Next**" button to create a password.
- Password requirements are listed at the top of the section, so the applicant can create their password accordingly.
- Once the password is created, the applicant clicks the "**Create Account**" button.

The screenshot shows a web form titled "Password". At the top, a text box contains the password requirements: "Passwords must be at least six characters long and may contain capital or lowercase letters, numbers, or any of the following special characters: !@#\$%&\*()\_". Below this are two input fields: "Password\*" and "Confirm Password\*". At the bottom left is a "Previous" button with a left arrow, and at the bottom right is a blue "Create Account" button. An orange arrow points to the "Create Account" button.

### EMAIL CONFIRMATION:

Upon clicking Create Account you will be taken to the Email Confirmation page, so you can confirm that you are receiving emails from the system. Follow the onscreen instructions and click the "Continue" button to finish the registration process. Now you have an account in this system, and remember, this is an account that you will use for both present and future applications.

### VIDEO 2: Applying for Funding

Upon completing registration and accessing the system for the first time, you will land on the **Apply Page**. This page will show you any currently open opportunities that you can apply for, as well as any relevant deadlines and other applicable information related to them.

- If you've been provided an access code, you may enter it in the upper right hand corner to reveal the opportunity you have been invited to apply to.
- You can preview the application without having to save any work by clicking on the "Preview" button.
- To start a request click on the blue "Apply" button under the opportunity you'd like to apply to.
  - Clicking Apply will take you into a form to complete or submit. Depending on the Foundation the form will likely be a LOI or Application. In this example, you are taken directly into the application.

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Once in the form, note, that your contact information and organization information automatically populates at the top of the form.

- You may also update your contact information, and view your email history.
  - If the Foundation allows applicants to update organization information you will see the edit icon next to the Organization Information.
  - If not, you must contact the Foundation directly to change organization information.
- If you'd like a PDF copy of the application, you can click the Question List button.
- Once you've completed the form, you may click the Application Packet button to download a copy of the questions and your responses.
- **(NEW starting 6/12/18)** Please note that if the form has a specific deadline it will be listed at the top of the form.
  - Depending on the Foundation you may or may not be able to submit after the deadline has passed.
    - If the past due message is reflected in orange, you may still submit the form.
    - If the past due message is reflected in red, you no longer have the option to submit the form.
      - If you are not allowed to submit, you will receive a message should you attempt to submit.

Work your way through the form responding to the fields.

- Note that any fields with an asterisk are required fields and must be completed prior to submitting an application.
- As you complete the form, the system will auto-save every 100 characters typed or every time you click out of a field.
- You may collapse question groups as you go, once you've finished all of the questions in that group, as an indicator to yourself that you've completed that section and reduce scrolling.
- Some fields have character limits.
  - Responses that are longer than the set limit will be saved, **but** an error message will appear informing the applicant the the limit has been exceeded.
    - You will not be allowed to submit the form until the length of the response has been decreased in accordance with the limit.
- File **upload fields** will only accept one file, per field.
  - Upload fields have size limits.

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- If you attempt to upload a file that is larger than the set MiB limit, you will receive an error message informing the applicant that the file is too large and the file **will not** be saved.
- Upload fields may also have File Type restrictions.
  - If you attempt to upload a file type in an unaccepted file type acceptable file type you will receive a warning that the file type is not acceptable and you will not be able to upload the file.
- Once a file has been uploaded, it may be **deleted** by clicking the **red X** next to the file name and a new file can be uploaded.
- Even though the system is auto-saving there is still a **“Save”** button at the bottom of the form.
  - When you click save you are taken to a confirmation page so you know the save was successful.
    - If you click **“Continue”** you will be taken back into the form so you can continue working.
    - If you save and exit the system, you will access the **draft of the form** from your **Dashboard** the next time you log in.
      - Pick back up where you left off by clicking **“Edit”** link to the right of the request.

When all of the fields are complete, submit the application.

- If any required fields were not completed, or a response to a text question type is longer than the set limit, the system will not allow the form to be submitted.
  - An error message appears listing the fields that need to be completed or edited.
  - These fields are outlined in red so they are easy to identify as the applicant scrolls through the form.
- When a form is submitted successfully, the applicant will be taken to a confirmation page.
  - When the you click **“Continue”** you are taken to your dashboard where you can VIEW your submitted request.
  - Note, that once an application has been submitted you can no longer edit it.


### VIDEO 3: Your Applicant Dashboard

Your dashboard houses current and historic requests.

**(NEW starting 6/12/18)** The active request tab houses all current requests. These are the requests still requiring action, awaiting a decision and/or requests that have not yet been marked closed by the site administrator. Within each request you can see forms, form statuses and submission dates and, if applicable, form deadlines.

▼ Fall Grant For Book Funding

**Process:** Base Camp Example Process

Application	Draft	07/24/2018	 <a href="#">Edit Application</a>
Decision	Undecided		

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- You may continue working on saved forms by clicking the edit option next to the form.
- You may view forms that have been submitted but note that once submitted you can not edit them.
- You can also see the request's decision status.
  - The status will be "Undecided" until the site administrator posts a decision.
    - Timing on decision status updates vary depending on the foundation.

If your request is approved you may be assigned Follow Up Reports to be completed and submitted through the system.

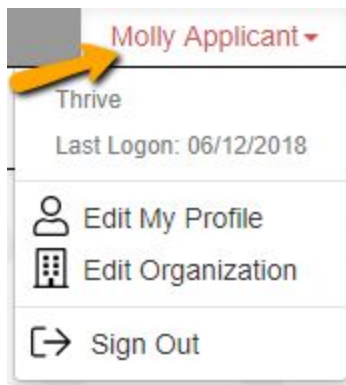
- Follow ups are completed and submitted just like any other form.
- If you've been assigned multiple follow up forms, you must complete them sequentially by due date.
- Follow ups that are past due will be marked as such.
  - If the past due message is reflected in orange, you may still submit the form.
  - If the past due message is reflected in red, you no longer have the option to submit the form.

### Follow Up Forms

FORM NAME	ASSIGNED TO	AWARD / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Award Agreement	Molly Applicant	Overall Award	05/31/2018 <span>Past Due</span>	Assigned	Edit

**(NEW starting 6/12/18)** Denied requests and requests marked closed by the site administrator are housed in the Historical Request tab.

If you wish to edit your account information or change your password, click your name in the type right. This will expand a drop-down menu. If you click Edit my profile, you will be able to update your user information or change your password. Be sure to click save in the bottom right once you've finished.



Please note, that you will be automatically logged out of the system after 90 minutes of inactivity (you will receive a warning message at 80 minutes of the pending "time out").