

## 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. 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 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;

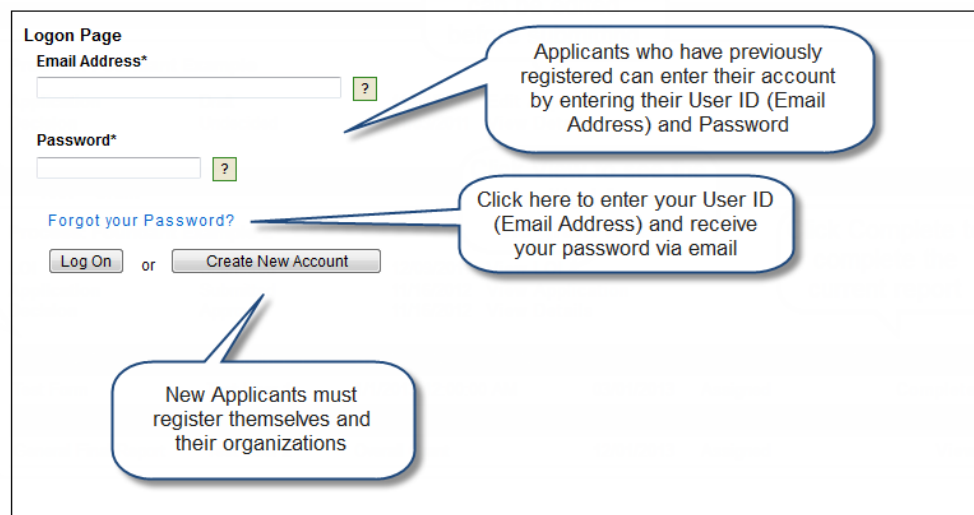
4. You can click on the Forgot your Password link, enter your User ID, and the system will email your password to your e-mail account.

If you do not have an existing account;

5. Click on Create New Account to register.



Technology for Doing Good, **Better.**

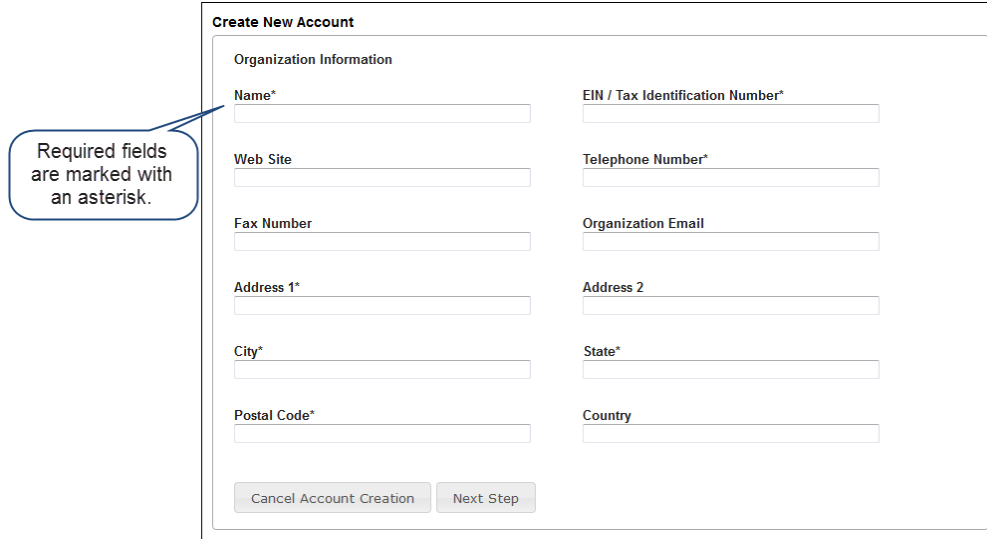


The screenshot shows the 'Logon Page' with the following elements and callouts:

- Email Address\*** field with a question mark icon. Callout: "Applicants who have previously registered can enter their account by entering their User ID (Email Address) and Password"
- Password\*** field with a question mark icon.
- [Forgot your Password?](#) link. Callout: "Click here to enter your User ID (Email Address) and receive your password via email"
- or
- Callout at the bottom: "New Applicants must register themselves and their organizations"

## To register an account

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



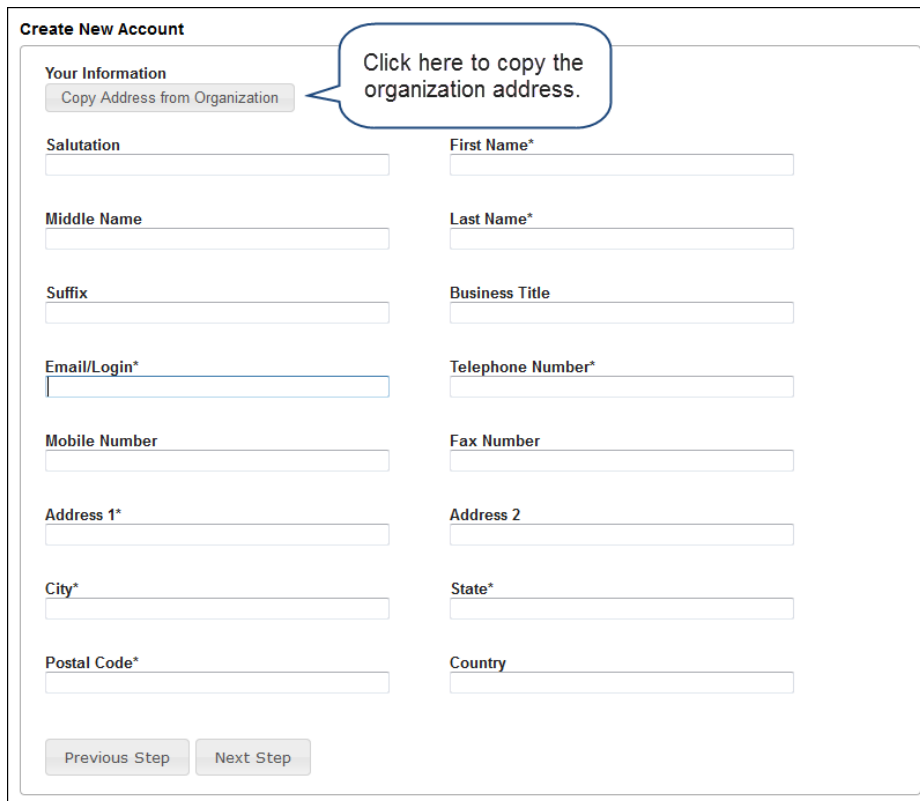
**Create New Account**

Organization Information

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

Cancel Account Creation   Next Step

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



**Create New Account**

Your Information

Copy Address from Organization

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

Previous Step   Next Step

## 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.  

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

## Applicant Tutorial

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

**Create New Account**

**Password**

**Password\***

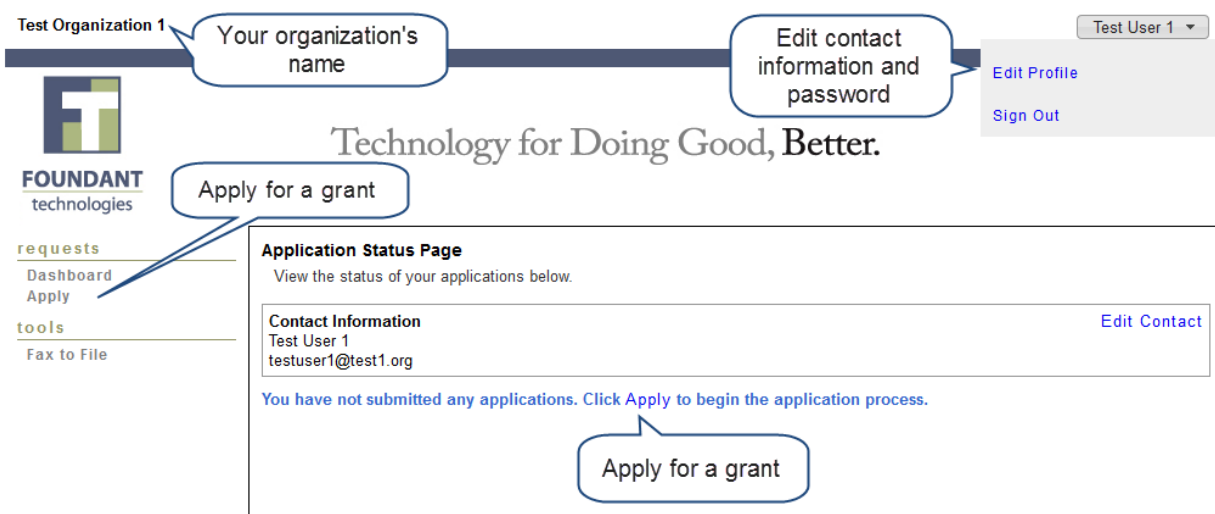
**Confirm Password\***

11. Click on the Finish button

### 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.

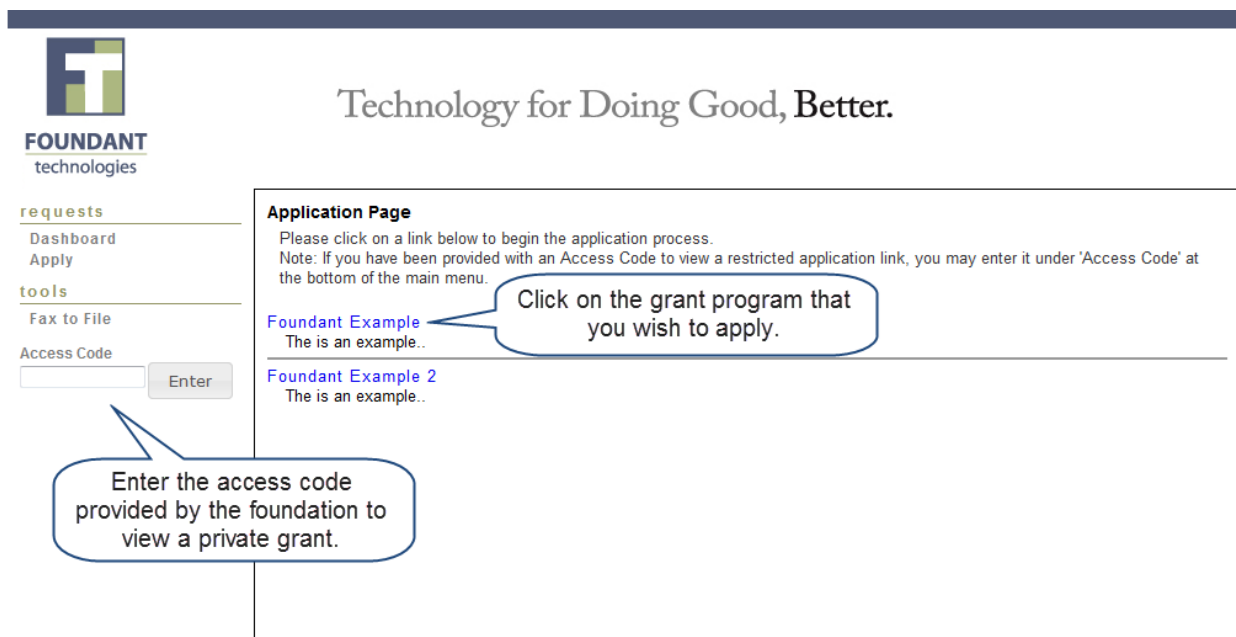


The screenshot shows the 'Application Status Page' for 'Test Organization 1'. The page header includes the organization name and a user dropdown menu for 'Test User 1' with options for 'Edit Profile' and 'Sign Out'. The main content area features the FOUNDANT logo, a navigation menu with 'requests' (Dashboard, Apply) and 'tools' (Fax to File), and a 'Contact Information' section for 'Test User 1' with an 'Edit Contact' link. A message states 'You have not submitted any applications. Click Apply to begin the application process.' and a large 'Apply for a grant' button is prominently displayed.

## 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 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.



The screenshot shows the Foundant Technologies application interface. On the left, there is a navigation menu with sections for 'requests' (Dashboard, Apply) and 'tools' (Fax to File, Access Code). The 'Access Code' section has an input field and an 'Enter' button. A callout bubble points to this field with the text: 'Enter the access code provided by the foundation to view a private grant.' The main content area is titled 'Application Page' and contains instructions: 'Please click on a link below to begin the application process. Note: If you have been provided with an Access Code to view a restricted application link, you may enter it under 'Access Code' at the bottom of the main menu.' Below the instructions are two links: 'Foundant Example' and 'Foundant Example 2', both with the text 'The is an example..'. A callout bubble points to the 'Foundant Example' link with the text: 'Click on the grant program that you wish to apply.'

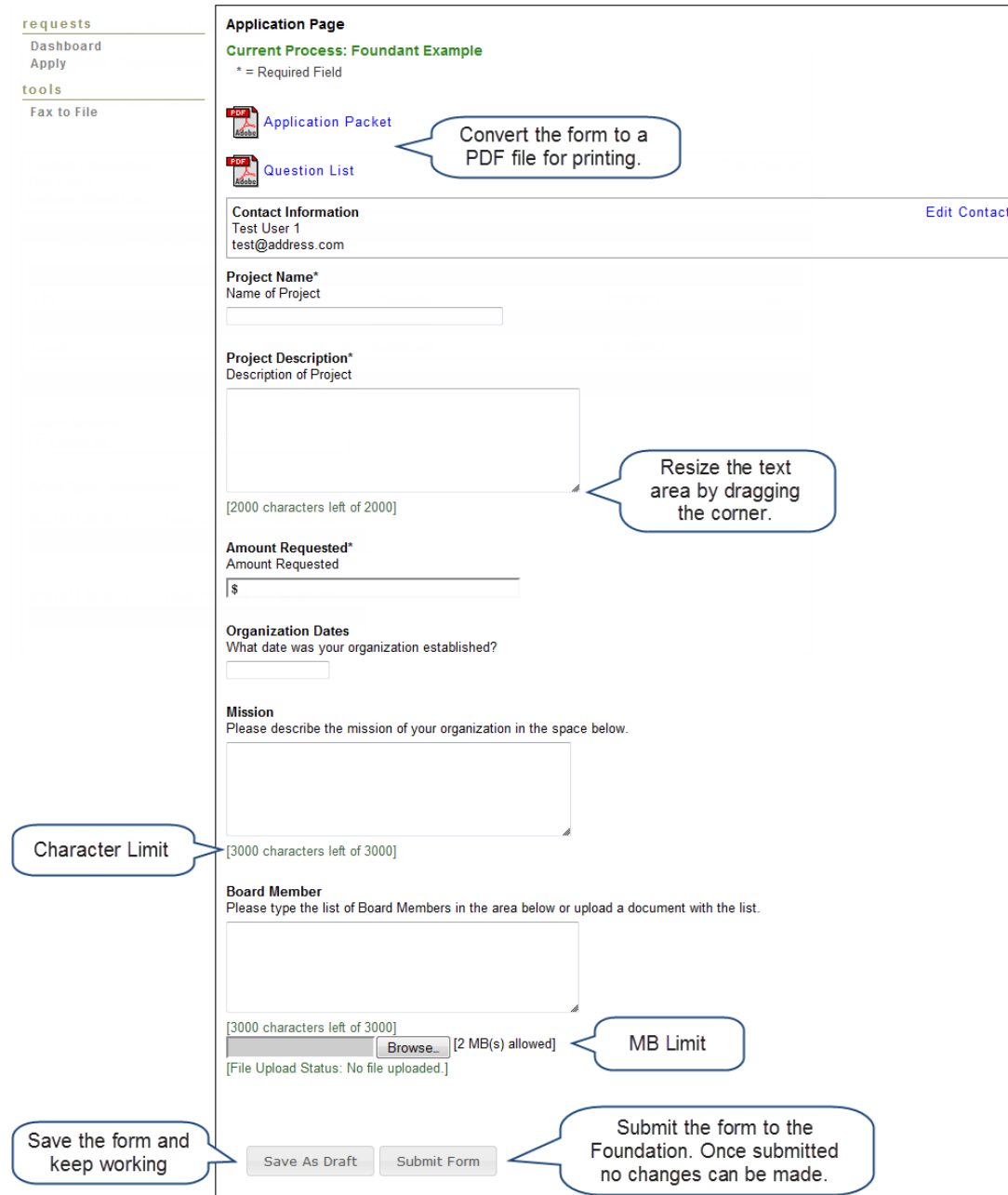
## Filling out the First Form

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.




**requests**  
Dashboard  
Apply

**tools**  
Fax to 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.]

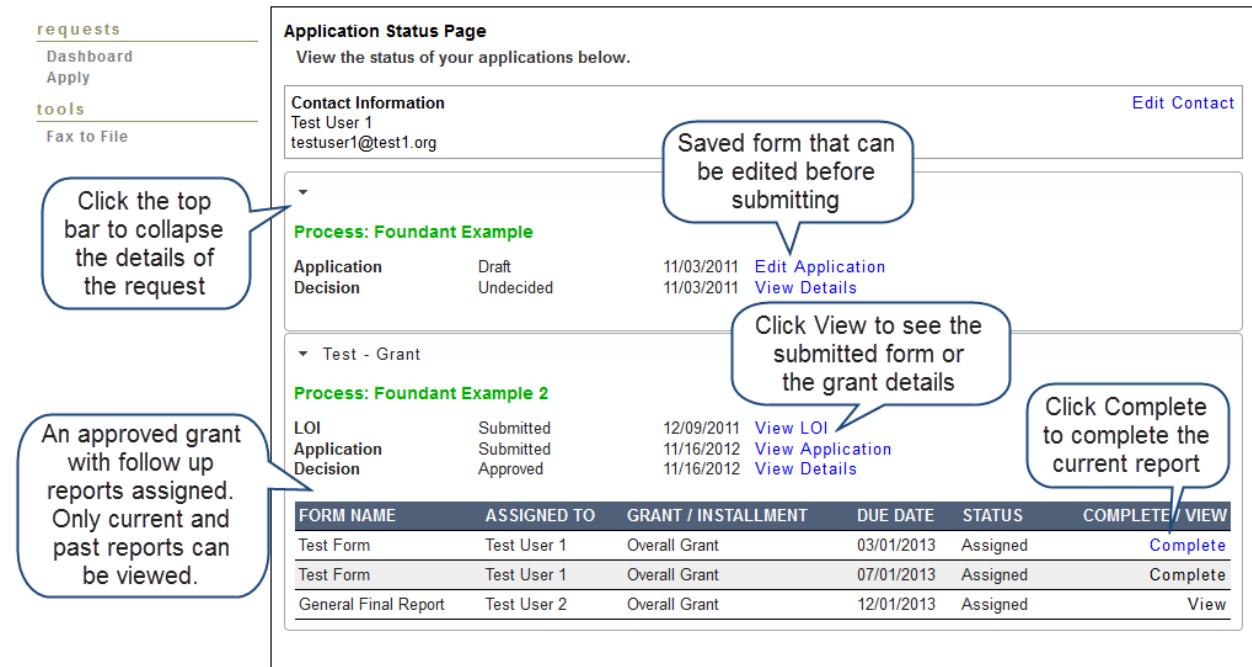
Submit the form to the Foundation. Once submitted no changes can be made.

Save the form and keep working

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



**requests**  
Dashboard  
Apply

**tools**  
Fax to File

**Application Status Page**  
View the status of your applications below.

Contact Information  
Test User 1  
testuser1@test1.org [Edit Contact](#)

Process: Foundant Example

Application Decision Draft Undecided 11/03/2011 11/03/2011 [Edit Application](#) [View Details](#)

Test - Grant

Process: Foundant Example 2

LOI Application Decision Submitted Submitted Approved 12/09/2011 11/16/2012 11/16/2012 [View LOI](#) [View Application](#) [View Details](#)

Click the top bar to collapse the details of the request

Saved form that can be edited before submitting

Click View to see the submitted form or the grant details

An approved grant with follow up reports assigned. Only current and past reports can be viewed.

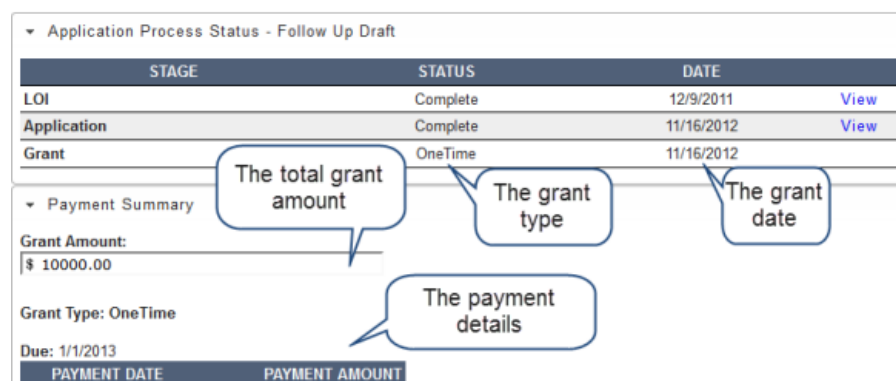
Click Complete to complete the current report

FORM NAME	ASSIGNED TO	GRANT / INSTALLMENT	DUE DATE	STATUS	COMPLETE / VIEW
Test Form	Test User 1	Overall Grant	03/01/2013	Assigned	<a href="#">Complete</a>
Test Form	Test User 1	Overall Grant	07/01/2013	Assigned	<a href="#">Complete</a>
General Final Report	Test User 2	Overall Grant	12/01/2013	Assigned	<a href="#">View</a>

## Viewing Decision Details

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

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.



Application Process Status - Follow Up Draft

STAGE	STATUS	DATE	
LOI	Complete	12/9/2011	<a href="#">View</a>
Application	Complete	11/16/2012	<a href="#">View</a>
Grant	OneTime	11/16/2012	

Payment Summary

Grant Amount: \$ 10000.00

Grant Type: OneTime

Due: 1/1/2013

PAYMENT DATE PAYMENT AMOUNT

The total grant amount

The grant type

The grant date

The payment details