

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;

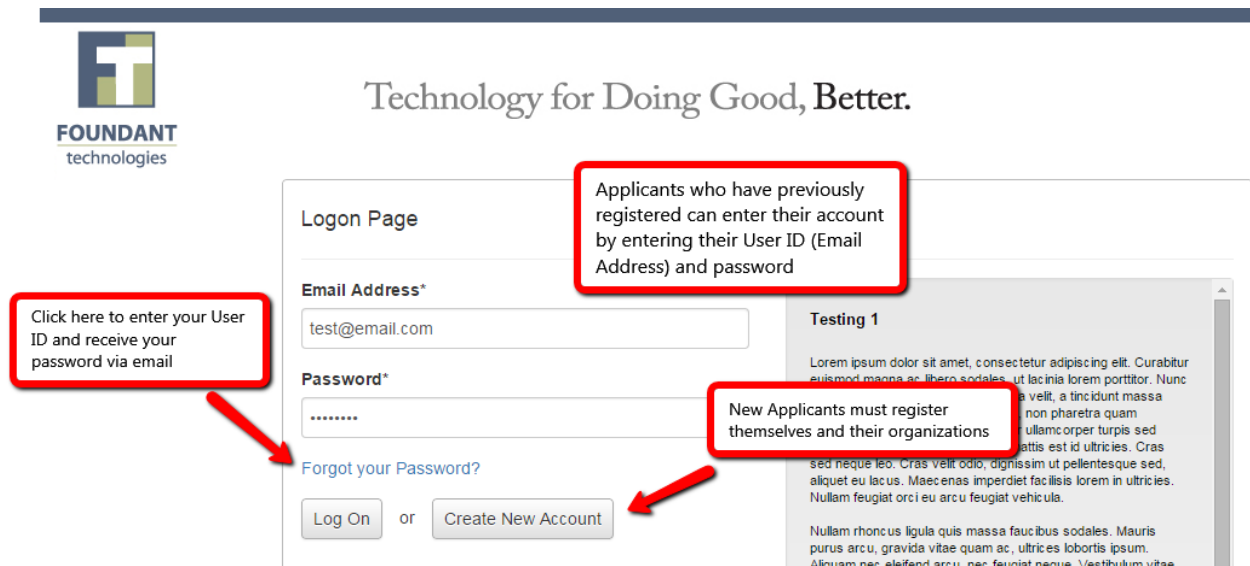
1. Enter your **Login**, which is your e-mail address, in the **Email Address** field.
2. Enter the **Password** that you chose when you set up your account.
3. Press the “**Log On**” button to enter the Grant Lifecycle Manager.

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 'Logon Page' of the Foundant Grant Lifecycle Manager. The page header includes the Foundant Technologies logo and the tagline 'Technology for Doing Good, Better.' The main content area contains a login form with the following elements:

- Email Address***: A text input field containing 'test@email.com'.
- Password***: A text input field with masked characters '.....'.
- Forgot your Password?**: A link below the password field.
- Log On** and **Create New Account**: Two buttons at the bottom of the form.

Annotations with red boxes and arrows point to specific features:

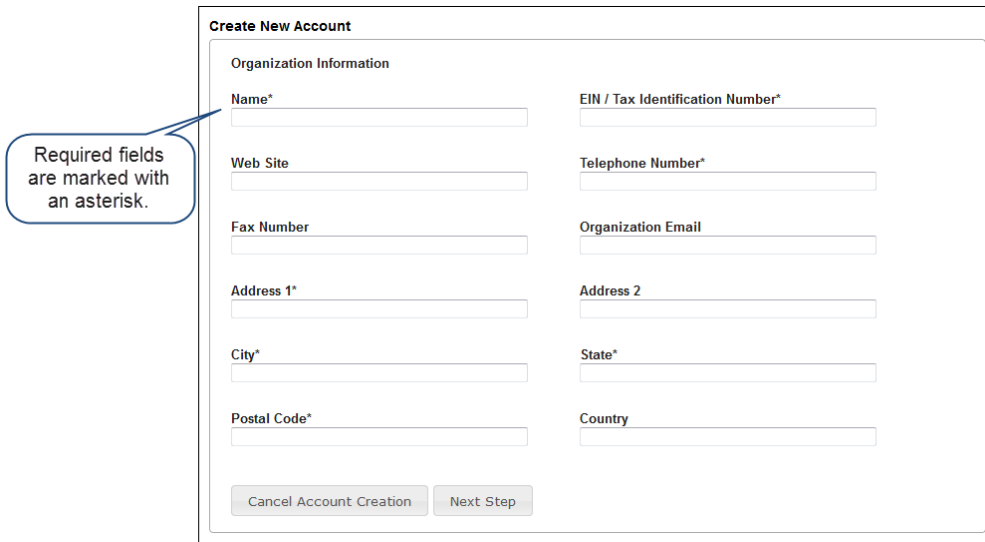
- A box above the form states: "Applicants who have previously registered can enter their account by entering their User ID (Email Address) and password".
- A box pointing to the 'Forgot your Password?' link states: "Click here to enter your User ID and receive your password via email".
- A box pointing to the 'Create New Account' button states: "New Applicants must register themselves and their organizations".

Below the login form is a section titled 'Testing 1' containing placeholder text: "Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur euismod magna ac libero sodales. ut lacinia lorem porttitor. Nunc a velit, a tincidunt massa non pharetra quam nullamcorper turpis sed mattis est id ultricies. Cras sed neque leo. Cras velit odio, dignissim ut pellentesque sed, aliquet eu lacus. Maecenas imperdiet facilisis lorem in ultricies. Nullam feugiat orci eu arcu feugiat vehicula. Nullam rhoncus ligula quis massa faucibus sodales. Mauris purus arcu, gravida vitae quam ac, ultrices lobortis ipsum. Aliquam nec eleifend arcu, nec feugiat neque. Vestibulum vitae".

Creating an Account

1. Click on **Create New Account**

2. Enter your **Organization Information**



Create New Account

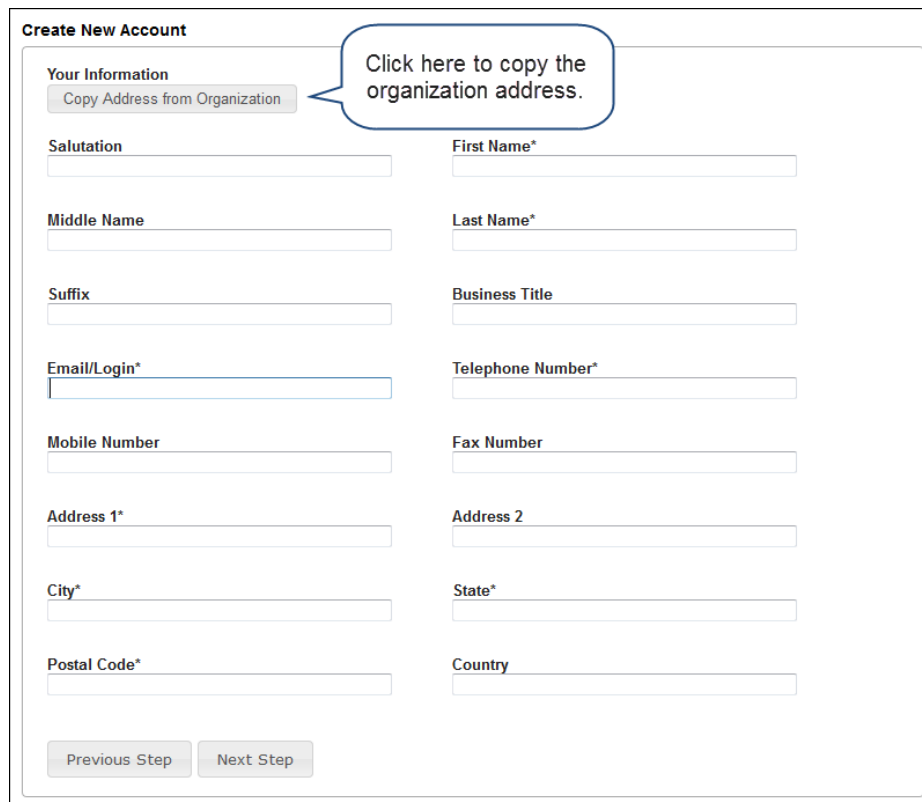
Organization Information

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 (Applicant) 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

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

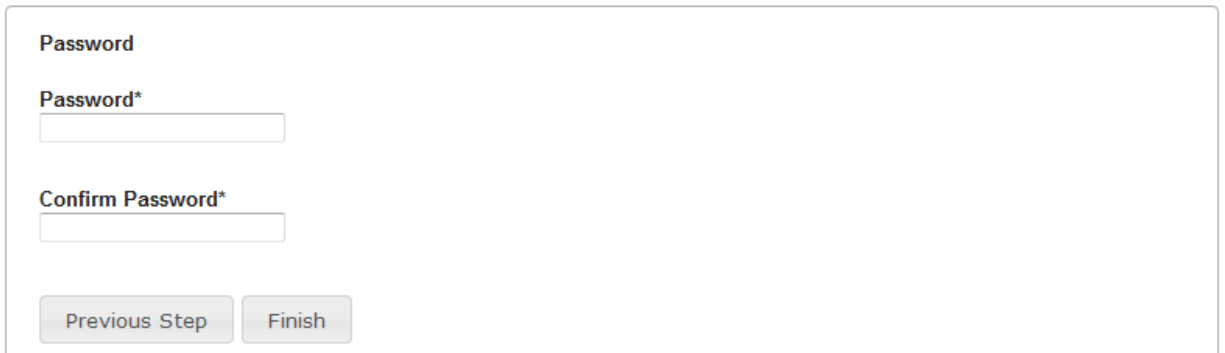
Additional Executive Officer Information

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"/>

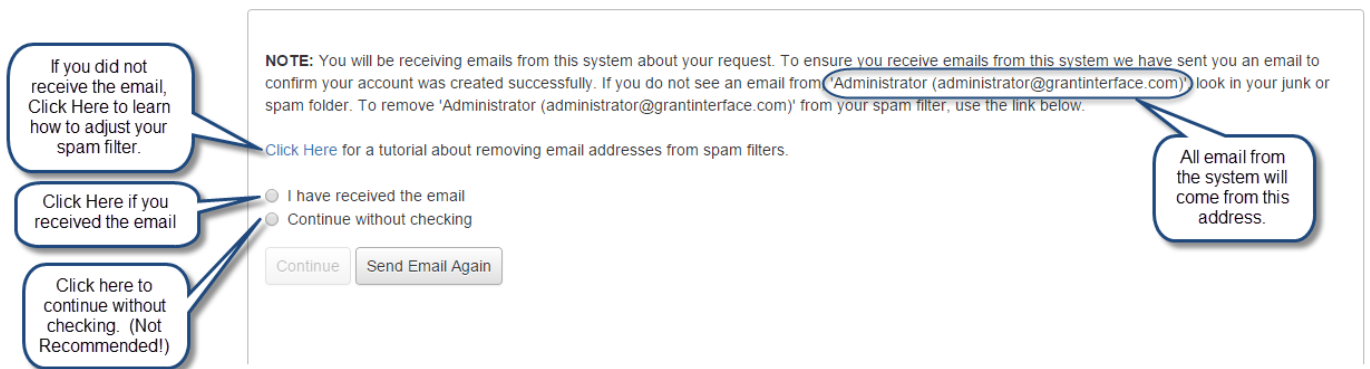
9. Click on the **Next Step** button
10. Set your password

Create New Account



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.

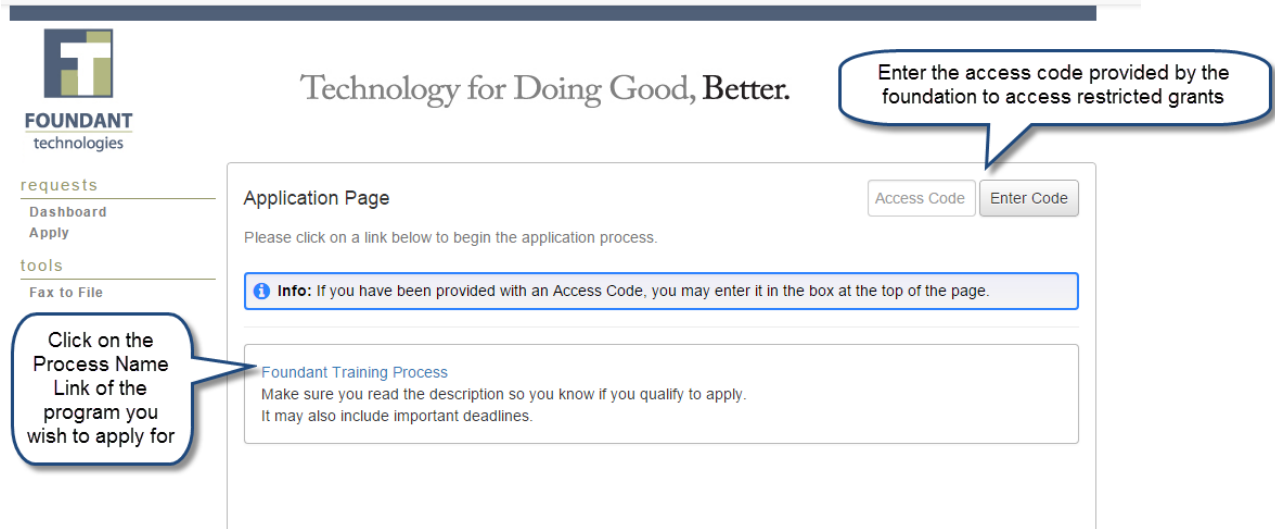


Choosing a Grant Program

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.

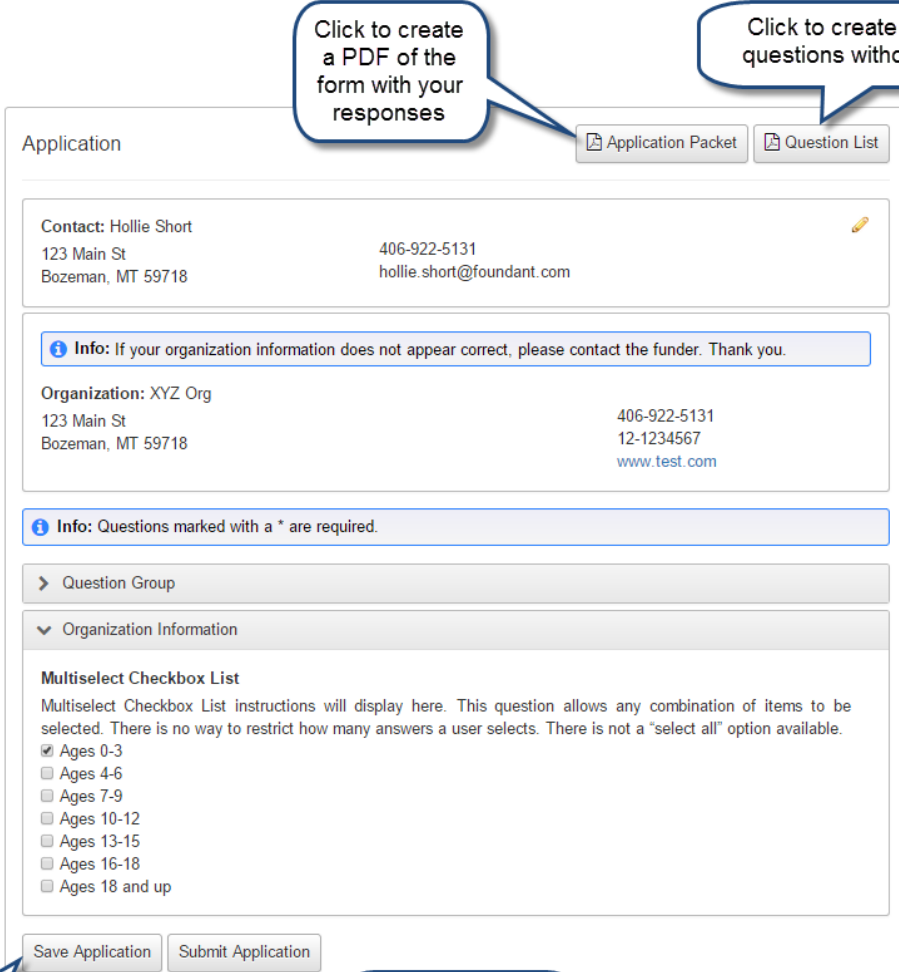


The screenshot shows the Foundant Technologies website interface. At the top, the logo and tagline "Technology for Doing Good, Better." are visible. A navigation menu on the left includes "requests" (Dashboard, Apply), "tools" (Fax to File), and "requests". The main content area is titled "Application Page" and contains an "Info" box with the text: "Info: If you have been provided with an Access Code, you may enter it in the box at the top of the page." Below this is a link for "Foundant Training Process" with a description: "Make sure you read the description so you know if you qualify to apply. It may also include important deadlines." Two callout boxes are present: one pointing to the "Apply" link in the navigation menu with the text "Click on the Process Name Link of the program you wish to apply for", and another pointing to the "Access Code" and "Enter Code" buttons with the text "Enter the access code provided by the foundation to access restricted grants".

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.



The screenshot shows an application form interface. At the top right, there are two buttons: "Application Packet" and "Question List". Callout boxes point to these buttons with the text: "Click to create a PDF of the form with your responses" and "Click to create a PDF of the questions without responses".

The form content includes:

- 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** (collapsed)
- Organization Information** (expanded):
 - 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

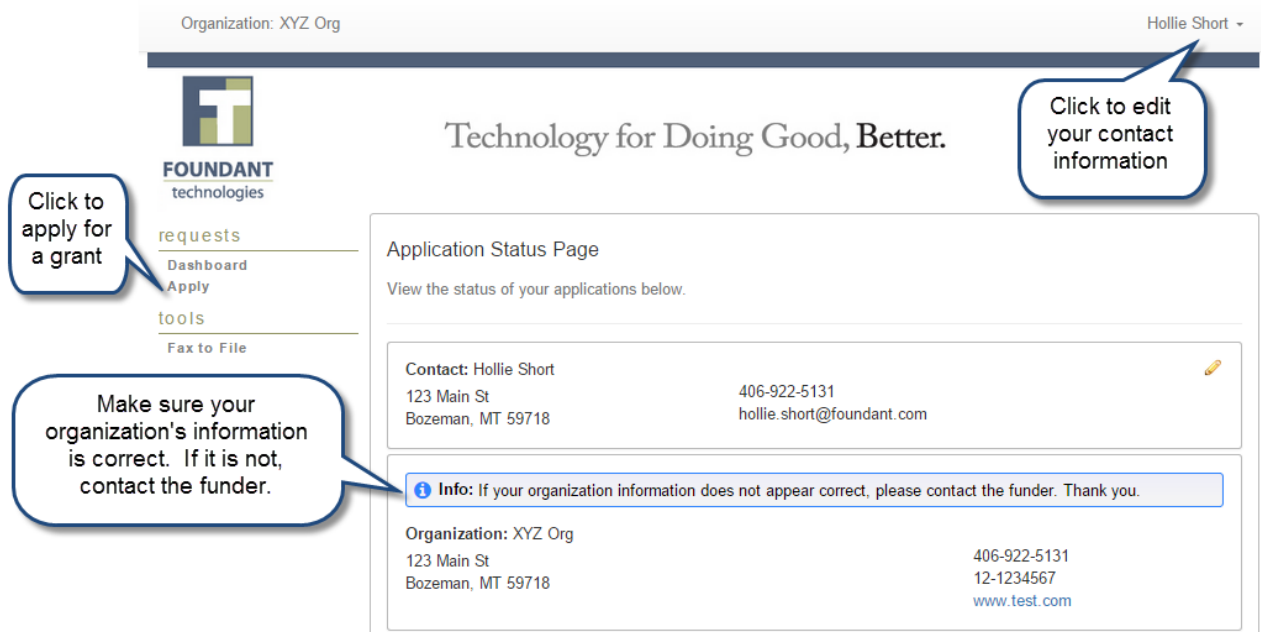
At the bottom of the form, there are two buttons: "Save Application" and "Submit Application". Callout boxes point to these buttons with the text: "Click to save the form" and "Click to submit your completed form".

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 'Application Status Page' for an organization named 'XYZ Org'. The page header includes the organization name and the user's name 'Hollie Short'. The main heading is 'Technology for Doing Good, Better.' The page content is divided into sections: 'requests' (with sub-links for 'Dashboard' and 'Apply'), 'tools' (with a link for 'Fax to File'), and 'Application Status Page' (with the instruction 'View the status of your applications below.').

Callouts provide additional instructions:

- 'Click to apply for a grant' points to the 'Apply' link in the 'requests' section.
- 'Click to edit your contact information' points to an edit icon in the contact information box.
- 'Make sure your organization's information is correct. If it is not, contact the funder.' points to an information message box.

The contact information box displays:

Contact: Hollie Short	406-922-5131
123 Main St	hollie.short@foundant.com
Bozeman, MT 59718	

The information message box states: **Info:** If your organization information does not appear correct, please contact the funder. Thank you.

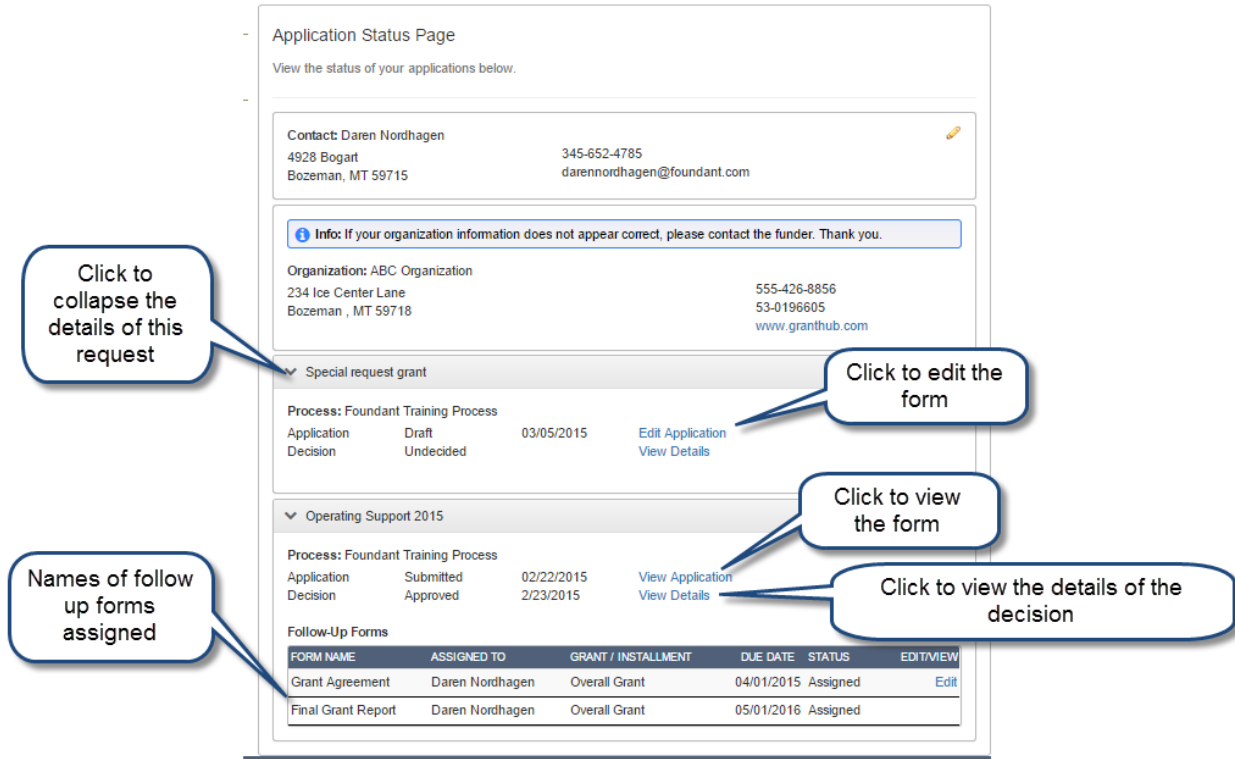
The organization information box displays:

Organization: XYZ Org	406-922-5131
123 Main St	12-1234567
Bozeman, MT 59718	www.test.com

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 the following content:

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

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

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

Special request grant

Process:	Application	Decision	Draft	Undecided	03/05/2015	Edit Application	View Details
Foundant Training Process							

Operating Support 2015

Process:	Application	Submitted	Decision	02/22/2015	03/05/2015	View Application	View Details
Foundant Training Process							

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	

Callouts:

- Click to collapse the details of this request (points to the 'Special request grant' header)
- Click to edit the form (points to the 'Edit Application' link)
- Click to view the form (points to the 'View Application' link)
- Click to view the details of the decision (points to the 'View Details' link)
- Names of follow up forms assigned (points to the 'Follow-Up Forms' table)

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

Grant Amount

Date of Grant

Grant Amount: \$2,500.00

Grant Type: One Time

Type of Grant

Due: 02/28/2015

Payment Details (if a payment has been made)

PAYMENT DATE	PAYMENT AMOUNT
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