

## Grant Lifecycle Manager (GLM) Applicant Tutorial

### Site Access and Account Creation

You will access the system via the [Logon](#) page. The foundation may have provided you with a link to this page, or it may be hyperlinked on their website. It's recommended 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 follow the instructions below to create a new account.

If at any time after creating an account, you can't remember your password, you may click on the *Forgot Your Password* link, enter your email address, and you will be sent a link to reset your password.



#### Logon Page

A screenshot of the logon page for the Community Foundation of Abilene's online grant system. The page has a white background. On the left side, there are two input fields: "Email Address\*" and "Password\*", each with a red border and a red error message below it stating "The Email Address\* field is required." and "The Password\* field is required." respectively. Below these fields are three buttons: "Log On" (blue), "Create New Account" (grey), and "Forgot your Password?" (blue text). Three yellow arrows point to the "Create New Account" button, the "Forgot your Password?" link, and the "Log On" button. On the right side, there is a grey box containing the following text: "Welcome to the Community Foundation of Abilene's online grant system!", "First time here? Click 'Create New Account'. Be sure to keep this login information for your organization's records.", "Been here before? If you have already used this online grant system, but have forgotten your password, please click 'Forgot Your Password?' and follow the instructions.", and "Not sure? If you believe your organization already has a profile but you are unsure of the login information, DO NOT create a new profile. Doing so could result in loss of historical information for your organization. Instead, ...".

#### Create a New Account

***\*If you believe your organization already has an account, please contact the Community Foundation of Abilene to be added as a user. Do not create a new account, as it could result in a loss of historical information for your organization. Follow the instructions below only if your organization is a first time grant applicant. If you are unsure, please contact a grants manager at the Community Foundation at 325-676-3883.***

Creating a new account is a multi-step process, follow the instructions below to create a new account.

1. From the Logon page, click **Create New Account**.
2. Once organization information has been entered, click **Next**.
3. Enter the user information in the following section, click **Next** when complete.
  - This section is your information.
  - If your address is the same as your organization's, 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.
  - The email address entered in the *Email / Username* field becomes your username in the system.

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- Should you need to navigate to the 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 the browser's back button, you will lose all registration information you have entered.
4. The next section is titled Executive Officer Question.
    - If you are the executive officer, select the *Yes* radio button and click **Next**. 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 the *No* radio button, click **Next**, and complete the required Executive Officer fields.
  5. Once the executive officer's information is entered, click **Next** to create a password.
  6. Create a password for your account and click **Create Account**.

### Email Confirmation

Upon creating an account you will be taken to the Email Confirmation page, so you can confirm that you are receiving emails from the system.

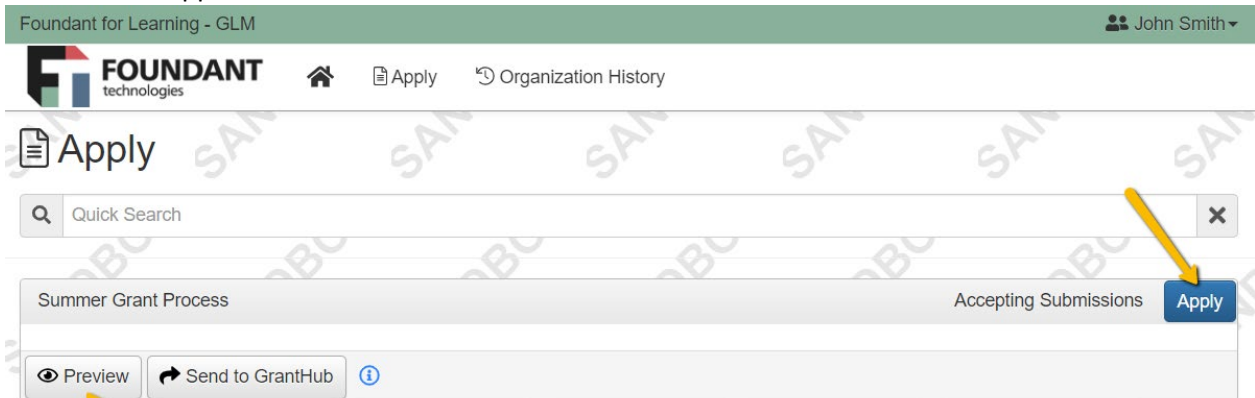
1. Follow the on-screen instructions and click **Continue** to finish the registration process.
2. Now you have an account in this system, and remember, this is an account that you will use for both present and future applications.

## Apply 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.

### General Information

1. 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.
2. You can preview the application without having to save any work by clicking on the **Preview** button.
3. To start a request, click on the blue **Apply** button under the opportunity you'd like to apply to.
  - This will take you into a form to complete and submit. Depending on the Foundation, the form will likely be an LOI or application.



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

The screenshot shows the 'Foundant for Learning - GLM' interface. At the top, there is a green header with the user's name 'John Smith'. Below the header is the Foundant Technologies logo and navigation links for 'Apply' and 'Organization History'. The main content area is divided into two tabs: 'Contact Info' (selected) and 'Request'. Under 'Contact Info', there are two sections: 'Applicant' and 'Organization'. The 'Applicant' section contains the name 'Mr. John Smith', email 'john.smith@example.org', and address '123-123-1234, 123 Main St., New York City, NY 12345'. The 'Organization' section contains 'John's Org', phone '12-1234567', and address '123-123-1234, 123 Main St., New York City, NY 12345 United States'. A yellow pencil icon is visible next to the organization name. Below these sections is a blue-bordered box with an information icon and the text: 'If your organization information does not appear correct, please click the edit (pencil) icon.' To the right of this box is a 'Question List' button with a document icon. Below the box is a 'LOI' field. Another blue-bordered box contains the text: 'Fields with an asterisk (\*) are required.' Below this are two form fields: 'Project Name\*' with a sub-label 'Name of Project.' and 'Amount Requested\*' with a sub-label '#'. A dropdown arrow is visible above the Project Name field.

- Please note that if the form has a specific deadline it will be listed at the top of the form.
  - 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.
  - Depending on the Foundation, you may or may not be able to submit after the deadline has passed.
- Once you've completed the form, you may click the Packet button to download a copy of the questions and your responses.

### Detailed Apply Information

- 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.
  - You will not be allowed to submit the form until the length of the response has been decreased in accordance with the limit.
  - Responses that are longer than the set limit will be saved, but an error message will appear informing the applicant that the limit has been exceeded.

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- File upload fields will only accept one file per field.
  - If you attempt to upload a file that is larger than the set MiB limit, you will receive an error message informing you that the file is too large and the file *will not* be saved.
  - If you attempt to upload a file in an unaccepted file type, you will receive a warning that the file type is not acceptable; and you will not be able to upload the file.
  - Upload fields have size limits.
  - Upload fields may also have file type restrictions.
  - 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.
- For some text questions, you might see a rich text editor bar. This allows you to add formatting to your response. If you're copying and pasting text from a Word document, it will also allow you to keep most formatting from Word.

The screenshot shows a form titled "Question Group" with a dropdown arrow. It contains three main sections:

- Project Name\***: A text input field with the placeholder "Name of Project." and the value "Elementary Education".
- Amount Requested\***: A text input field with a "# 500" label and the value "500".
- Project Description**: A rich text editor with a toolbar containing icons for Bold (B), Italic (i), Underline (U), Bulleted List, and Numbered List. A yellow arrow points to the Numbered List icon. Below the toolbar is a large text area with a vertical cursor. At the bottom of the editor, a green bar indicates "1,000 characters left of 1,000".

- Click a button in the editor (e.g. the B button for bold text) and then type. The formatting will be applied to the text that you type (e.g. the text you type will be bold).
  - Click the button in the editor again to stop using that formatting when you continue typing.
  - Highlight existing text and then click a button in the editor. The formatting will be applied to the highlighted text.
  - Highlight existing text and click the button in the editor again to remove the formatting.
  - When adding a numbered or bulleted list, click the arrow next to the list button to view additional formatting options.
- Even though the system is auto-saving, there is still a Save button at the bottom of the form.
    - 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 the **Edit** link to the right of the request.
    - When you click Save you are taken to a confirmation page so you know the save was successful.
  - You may abandon the request if it is the first form to be submitted for this request.
    - Once the first form, either an LOI or Application, has been submitted, you must contact an administrator to withdraw the request from consideration.
    - After selecting Abandon Requests, you must type in "ABANDON REQUEST" and click OK.

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- The request will then be visible in the Historical Requests tab just as it would if an administrator had abandoned the request.
6. When all of the fields are complete, submit the form.
- 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 you click Continue, you are taken to your dashboard where you can view your submitted request.
  - Once an application has been submitted, you can no longer edit it.

## Applicant Dashboard

Your dashboard houses current and historical requests.

The screenshot displays the Applicant Dashboard interface. At the top, there is a navigation bar with the FOUNDANT technologies logo, a home icon, an 'Apply' button, and an 'Organization History' link. Below the navigation bar, the title 'Applicant Dashboard' is shown. A 'Public Profile' button is visible. The main content area is divided into two columns: 'Applicant' and 'Organization'. The Applicant information includes: Mr. John Smith, john.smith@example.org, 123-123-1234, 123 Main St., New York City, NY 12345. The Organization information includes: John's Org, 12-1234567, 123-123-1234, 123 Main St., New York City, NY 12345 United States. A message below the organization information states: 'If your organization information does not appear correct, please click the edit (pencil) icon.' Below this, there are two tabs: 'Active Requests (2)' and 'Historical Requests (1)'. The 'Active Requests' tab is selected. Underneath, there are two sections: 'Elementary Education' and 'Operating Funds'. The 'Elementary Education' section shows a table with columns for Process, LOI, Draft, Submitted, Decision, and Due by. The 'Operating Funds' section shows a similar table. A 'Follow Up Forms' section is also visible at the bottom.

Process	LOI	Draft	Submitted	Decision	Due by	Action	
Winter Grant Process		Draft			02/26/2022	Due by 03/01/2022 02:00 PM CST	Edit LOI
Summer Grant Process			Submitted		02/26/2022		View LOI
			Submitted		02/26/2022		View Application
				Undecided			

The Active Requests 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.

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

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If your request is approved, you may be assigned follow up forms 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, the Foundation may require that you complete them sequentially by due date. If this is the case, you'll see the option to edit and submit the follow up with the earliest due date, but you will not see that option for the other follow ups yet. You might also see the option to preview and save your work on forms with later due dates, but you still must submit the forms in order by due date.
- Alternatively, the Foundation may allow you to submit follow up forms in any order. If this is the case, you'll see the option to edit each follow up form right away.
- 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.

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 top right. This will expand a drop-down menu where you will have the option to edit your profile information, including changing your password. Be sure to click save in the bottom right once you've finished.

Community Foundation of Abilene Jane Bell

Apply Organization History

### Applicant Dashboard

**Applicant:**  
Jane Bell  
jbell@gmail.com  
123 State St.  
Abilene, TX 79603

**Organization:**  
ABC Rescue  
12-1234567

Contact Email History

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

Active Requests 0 Historical Requests 1

Please note, 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).