

Applicant Tutorial

Foundant Grant Lifecycle Manager

Overview

This document is designed to provide grant applicants instructions for use of the Foundant Grant Lifecycle Manager application on The Kinsman Foundation website. Although this document attempts to provide step-by-step instructions, not all user scenarios may be adequately covered. Please contact The Kinsman Foundation staff for additional help.

Registration Page

If you already have an account with this Foundant Grant Lifecycle Manager:

1. Enter your User ID, which is your e-mail address, in the login 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. Click the Forgot your Password button, 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 Create New Account to register.

Logon Page

The screenshot shows the 'Logon Page' interface. It features two input fields: 'User ID*' and 'Password*', each with a green question mark icon to its right. Below these fields are two buttons: 'Log On' and 'Forgot your Password? Click Here.'. Underneath the buttons, there is a line of text: 'New applicants can click below to register.' followed by a 'Create New Account' button. Three callout boxes provide additional information: one points to the 'Forgot your Password? Click Here.' button with the text 'Applicants who previously registered can enter their account by entering their User ID and Password'; another points to the 'Create New Account' button with the text 'Click here to enter the User ID and have the system send the password'; and a third points to the 'Create New Account' button with the text 'New applicants must register themselves and their organizations'.

To register an account

1. Clicking Create New Account on the Logon Page will take you to the Register page.

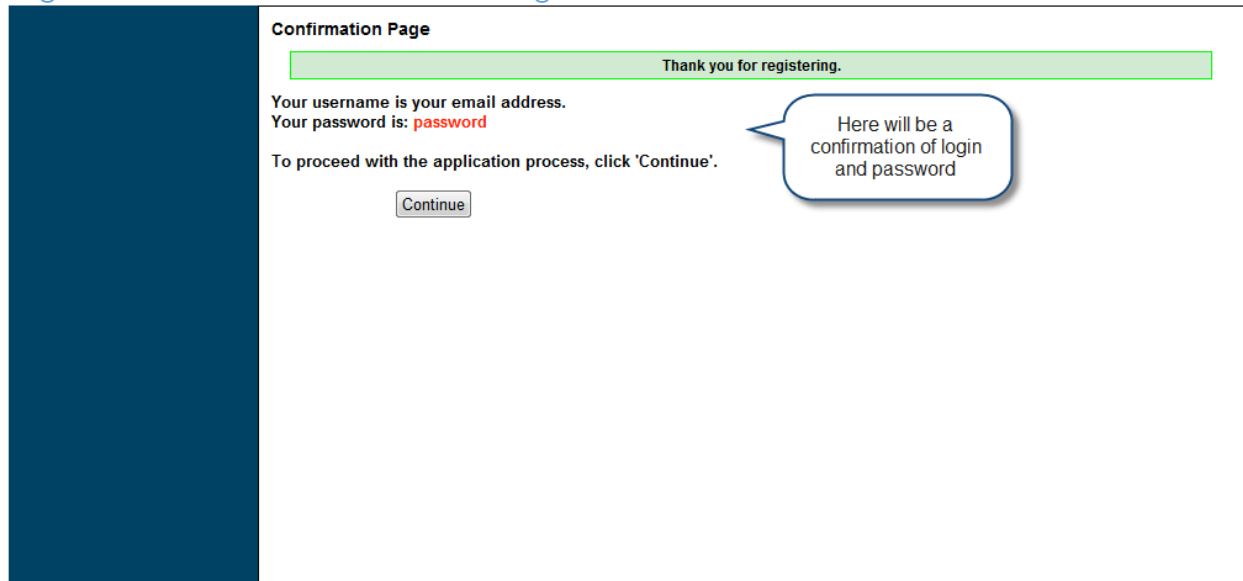
Applicant Tutorial

2. Enter your personal contact information;
3. Enter your organization's contact information;
4. Click the Proceed to Next Step button.

Entering a Password

1. After you have registered your account, you will be taken to a Set Password Page where you will enter your password twice, then click Save.
2. A Confirmation Page will display the password you have chosen.
3. You will receive an automatically-generated email from Foundant Technologies confirming your registration.

Login and Password Confirmation Page



The screenshot shows a web page titled "Confirmation Page" with a dark blue sidebar on the left. At the top, a green banner reads "Thank you for registering." Below this, the text states: "Your username is your email address. Your password is: **password**". A callout bubble points to this text, saying "Here will be a confirmation of login and password". Below the text, it says "To proceed with the application process, click 'Continue'." and there is a "Continue" button.



Applicant Tutorial

Application Status Page

When you Continue from the registration Confirmation Page, you will be taken to an Application Status Page. This is your homepage where you can check the status of your pending applications. There will be links to view documents you have submitted and to edit documents you have saved as drafts. You may also choose:

1. Start New Application - This allows you to begin the application process.
2. Fax to File - This feature is not active in this version of the software. If you want to fax any application materials, you may fax them directly to The Kinsman Foundation.
3. Edit Contact - This allows you to edit the registration information you provided or to change your password.

Application Status Page

The screenshot shows the 'Application Status Page' interface. On the left is a dark blue sidebar with three menu items: 'Start New Application', 'Application Status', and 'Fax to File'. The main content area has a title 'Application Status Page' and a subtitle 'View the status of your applications below.'. Below this is a 'Contact Information' section with the following text: 'Grant Elliott', '12 Yellow Road', 'Bozeman, MT 59718', and 'Email@Address.com'. To the right of this section is a purple link labeled 'Edit Contact'. Below the contact information, there is a message: 'You have not submitted any applications. Click [Apply](#) to begin the application process.'. The word 'Apply' is underlined and blue. There are three callout boxes: one pointing to the 'Apply for a grant' link in the sidebar, one pointing to the 'Edit Contact' link, and one pointing to the 'Apply' link in the main text.



(See additional graphic on next page)

Applicant Tutorial

Application Status Page after Application is submitted (sample)

The screenshot shows the 'Application Status Page' with a dark blue sidebar on the left containing links: 'Start New Application', 'Application Status', and 'Fax to File'. The main content area is titled 'Application Status Page' and includes the instruction 'View the status of your applications below.'.

Contact Information Grant Elliott
12 Yellow Road
Bozeman, MT 59718
Email@Address.com [Edit Contact](#)

test [loi app overwrite test 2](#) (⌵)

LOI Application	Submitted	10/2/2009	View LOI	Awaiting Foundation Action
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Qualification LOI Application Draft 9/30/2009 [Edit Qualification](#) [All Stages Test Process](#) (⌵)

Callout 1: Submitted LOI and awaiting the foundation for approval to get the application (points to the 'Submitted' status).

Callout 2: Saved form that can still be edited before submitting (points to the 'Draft' status).

Applicant Tutorial

Process Selection Page

Clicking the Start New Application link will take you to the Process Selection Page. The Kinsman Foundation grant programs are combined in the two steps you will see on this page:

1. Letter of Inquiry for 2010 grants, and
2. Grant Application Step 2 for 2010.

To initiate a grant application for either the Small or Conventional Grant Program, please click the Letter of Inquiry link after reviewing the explanatory material below it.

If your Letter of Inquiry is approved, Foundation staff will invite you to return to this Page to complete the Step 2 process.

Applicant Instruction Page

This page is designed to maximize your awareness of the time out features of web applications. You'll have to confirm you've read the information on this page and then wait to click Continue to reach the Application Page. So that we may manage security risks, the software automatically logs you off if there is no activity on the system for over a 40 minute time period. There will be a Save as Draft button on each form in each process.

Applicant Instruction Page

The screenshot shows a web application interface. On the left is a dark blue sidebar with the following links: "Start New Application", "Application Status", and "Fax to File". The main content area is titled "Applicant Instruction Page" and shows the "Current Process: Ann and Abe Effron Donor Advised Grants". A green banner at the top of the main area contains the text: "Please be aware that web applications do time out. Use the 'Save as Draft' button early and often. Thank you." Below this banner is a checkbox labeled "I have read and understand the applicant instructions". To the left of the checkbox is a "Continue" button. A callout bubble points to the "Continue" button with the text "Continue to the first form". Another callout bubble points to the checkbox with the text "Agree to applicant instructions before clicking continue".

Applicant Tutorial

[Application Page](#)

The Application Page should be on your screen now. First you should provide a Project Name unique to this application. The Kinsman Foundation staff will have the ability to edit this name to standardize some of the grant information we receive; you'll be notified if this happens. We will not have the ability to edit other parts of your application.

The Save as Draft button is at the bottom of this page. When you use it, you may either continue working immediately or exit the software and return at your convenience.

Clicking the Print Question Legend link will create an Adobe Portable Document File on your computer containing the Application questions plus the possible choices of answers when there is a list.

Questions with a free-form answer text box will have a character limit, which allows you to enter or paste only to the maximum file size.

File upload areas will have a megabyte limit for the size of files you can upload.

If you optionally email, mail or fax additional information, The Kinsman Foundation staff will attach the material to your application after it is submitted.

When you have finished, click the Submit Form button. After this you may no longer edit your application, but you may view or print it from the Application Status Page. Your application will be transmitted to The Kinsman Foundation, and a confirmation page will appear. You may Log Off in the upper right hand corner of the page.

The Kinsman Foundation staff will review your application for completeness and appropriate content. We may ask for additional information and send the application back to you for further work. If you have had no response from a real human being within five business days, please call or email us.

(See graphic on next page)

[Completing a Form \(Sample\)](#)

Applicant Tutorial

Start New Application
Application Status
Fax to File

Qualification Page
Current Process: All Stages Test Process

To avoid losing your work, please [Save As Draft](#) a minimum of once per hour.

* = Required Field

[Print Question Legend](#) Printing will convert the form to a PDF for printing
[Print Packet](#)

Contact Information Grant Elliott
12 Yellow Road
Bozeman, MT 59718
Email@Address.com [Edit Contact](#)

Project Name* ?

Not-For-Profit* Is your organization a non profit organization?
 Yes ?
 No

Employees* ?

Budget* Please upload the project budget. ? [Browse...](#) File size limit [1 MB(s) allowed]
[File Upload Status: No file uploaded.]

Request* What is the amount of the request?
\$?

Date* When will the funds be needed?
 ?

Project* Briefly describe the proposed project. ?
Character Limit [500 characters left]

[Save As Draft](#) [Cancel](#) [Submit Form](#)

Save form and keep working Submit form to the foundation

IF EVERYTHING GOES WRONG: contact us. We will have the ability to delete everything you have submitted, and you can start over.