

Overview

This document is designed to provide Office of Cultural Affairs funding 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 one 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;

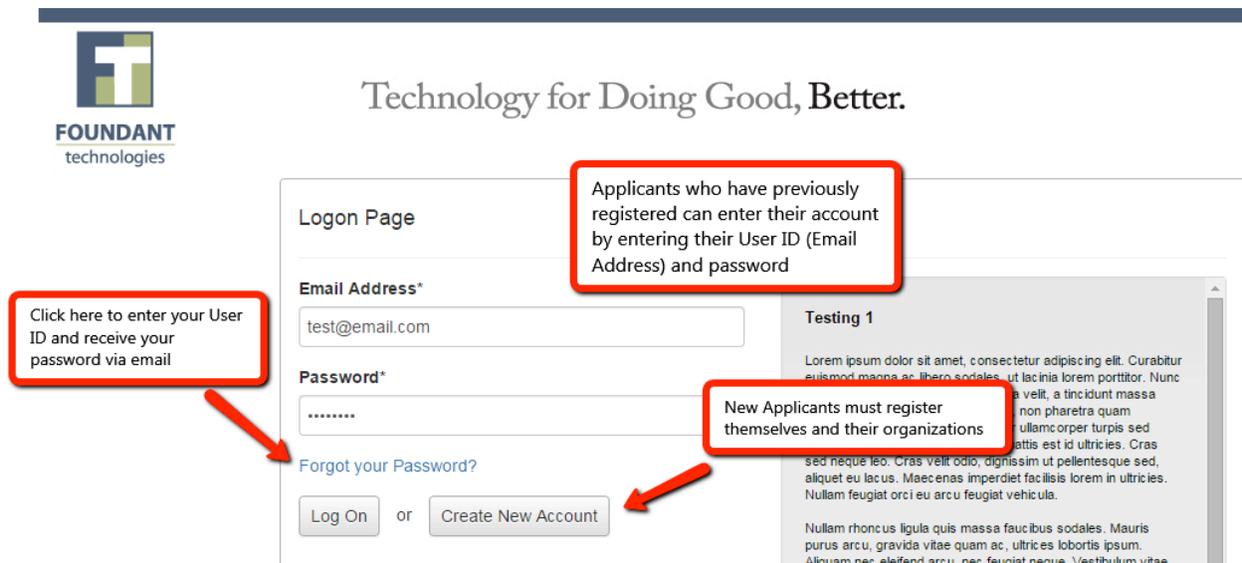
1. Enter your **Login**, which is your e-mail address, in the **Email Address** field.
2. Enter the **Password** that you chose when you set up your account.
3. Press the “**Log On**” button to enter the Grant Lifecycle Manager.

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 Foundant Technologies Logon Page. The page header includes the Foundant Technologies logo and the tagline "Technology for Doing Good, Better." The main content area is titled "Logon Page" and contains the following elements:

- Email Address*** field: A text input field containing "test@email.com".
- Password*** field: A text input field with masked characters (dots).
- Forgot your Password?** link: A blue text link below the password field.
- Log On** button: A button to the left of the "or" text.
- Create New Account** button: A button to the right of the "or" text.

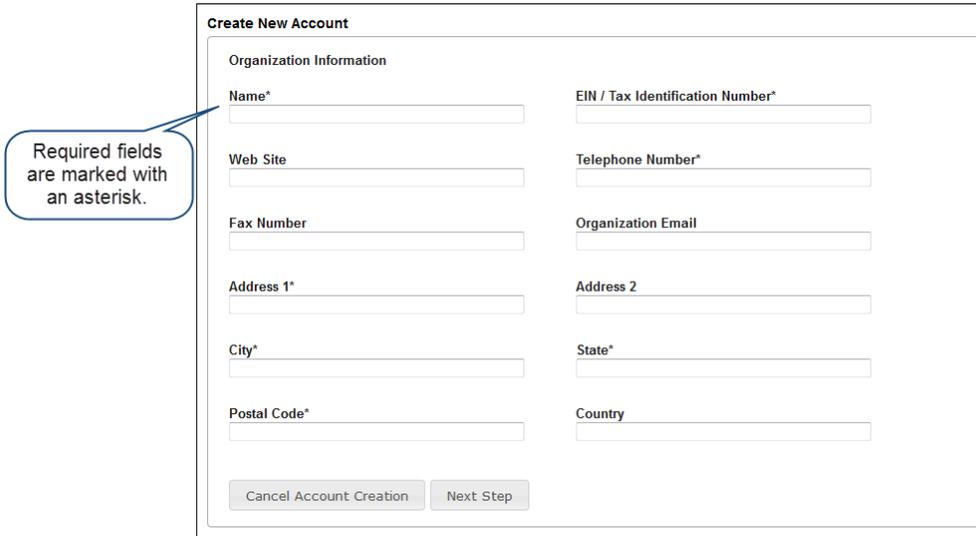
Annotations with red boxes and arrows point to specific features:

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

On the right side of the page, there is a "Testing 1" section with 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 nullam orper 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**



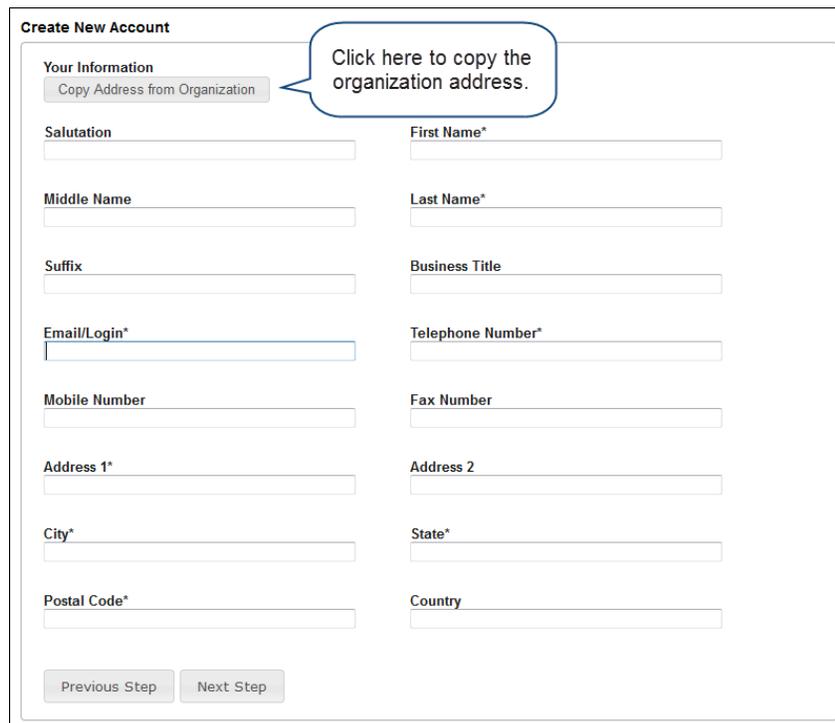
Create New Account

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

Password

Password*

Confirm Password*

[Previous Step](#) [Finish](#)

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.

NOTE: You will be receiving emails from this system about your request. To ensure you receive emails from this system we have sent you an email to confirm your account was created successfully. If you do not see an email from [**Administrator \(administrator@grantinterface.com\)**](mailto:Administrator (administrator@grantinterface.com)) look in your junk or spam folder. To remove 'Administrator (administrator@grantinterface.com)' from your spam filter, use the link below.

[Click Here](#) for a tutorial about removing email addresses from spam filters.

I have received the email

Continue without checking

[Continue](#) [Send Email Again](#)

If you did not receive the email, Click Here to learn how to adjust your spam filter.

Click Here if you received the email

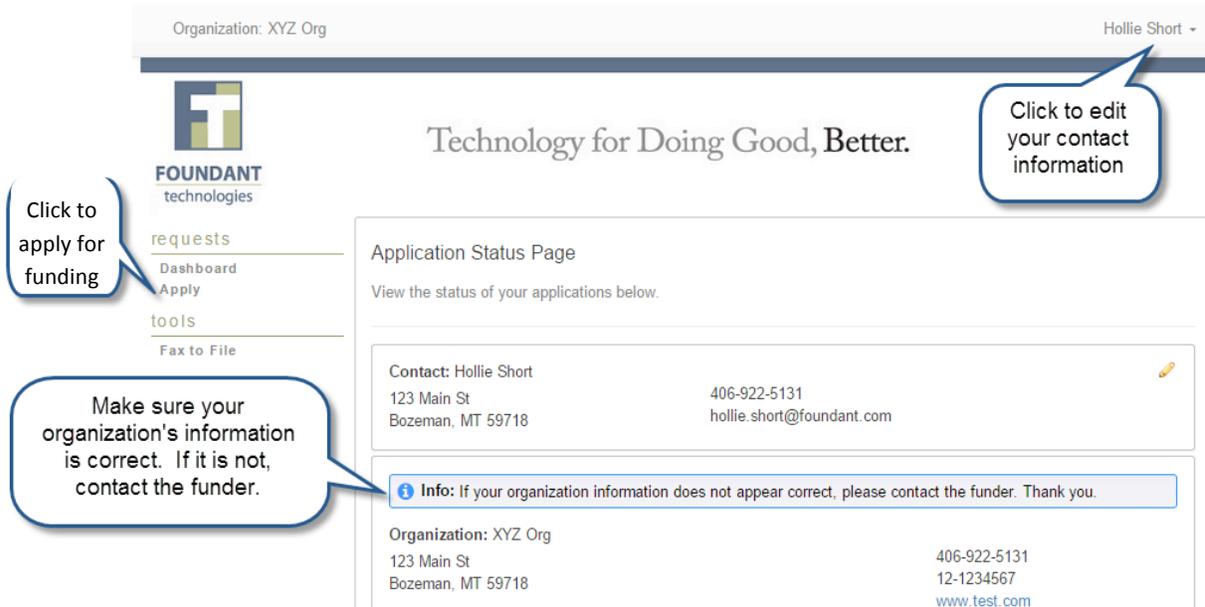
Click here to continue without checking. (Not Recommended!)

All email from the system will come from this address.

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 funding applications and apply.
2. Dashboard – This is your homepage where you can check on the status of your funding requests. 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.



Organization: XYZ Org Hollie Short -

FOUNDANT technologies

Technology for Doing Good, **Better.**

requests
Dashboard
Apply

tools
Fax to File

Click to apply for funding

Click to edit your contact information

Make sure your organization's information is correct. If it is not, contact the funder.

Application Status Page

View the status of your applications below.

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

Choosing a Funding Application

After clicking on the **Apply** link you will have the ability to choose an Arts Funding Application to apply for. Each funding program will have a brief description; options include Education projects, Presentation projects, or combined Education & Presentation. Read these descriptions thoroughly before applying.

- 1) Read through the application description to decide if you qualify to apply for the program.
- 2) After making your application selection, click it to start filling out the application form. Note that once you make a selection, you will automatically have this application form saved as a Draft in the system. If you realize that you have chosen the wrong application form, contact OCA and we will correct the issue.

requests

Dashboard
Apply

tools

Fax to File

Click on process name of application you wish to apply for.



Application Page

Please click on a link below to begin the application process.

[FY17 Arts Funding Application - Presentation](#)

The purpose of this program is to maintain and enhance the quality of arts services and to broaden the artistic scope of the city's cultural activities. The program seeks to provide residents with a greater opportunity to be exposed to traditional artistic activities as well as new and imaginative endeavors in visual, performing and literary arts by one or more of the following:

- Assisting local nonprofit arts organizations in producing and/or presenting quality arts programs
- Increasing the availability and range of quality arts experiences throughout the community
- Developing a broader audience base for a range of creative and artistic experiences
- Promoting excellence, diversity and vitality in Columbia's cultural environment

Examples of Presentation Projects include concerts, performing arts series, special events, exhibits, etc. If you are not sure that your proposed project fits with the guidelines, contact OCA staff.

[FY17 Arts Funding Application - Education](#)

The purpose of this program is to support more effective involvement of artists and arts organizations in the life-long learning process of all citizens. The program seeks to provide residents with a greater opportunity to participate in quality visual, literary and performing arts experiences by one or more of the following:

- Developing audiences through art in education, programming for non-traditional audiences in non-traditional venues, forging non-traditional links in the community
- Providing new arts experiences
- Integrating art in all aspects of life, targeting those not fully participating in the arts such as the business community, senior citizens, social services agencies, etc.
- Increasing the interaction between arts organizations and artists in the education of youth
- Enhancing classroom teachers' ability to teach about and with the arts

Examples of Education Projects may include classes, workshops, seminars, symposiums, in-school programming, literary publications, etc. If you are not sure that your proposed project fits within the guidelines, contact OCA staff.

[FY17 Arts Funding Application - Education & Presentation](#)

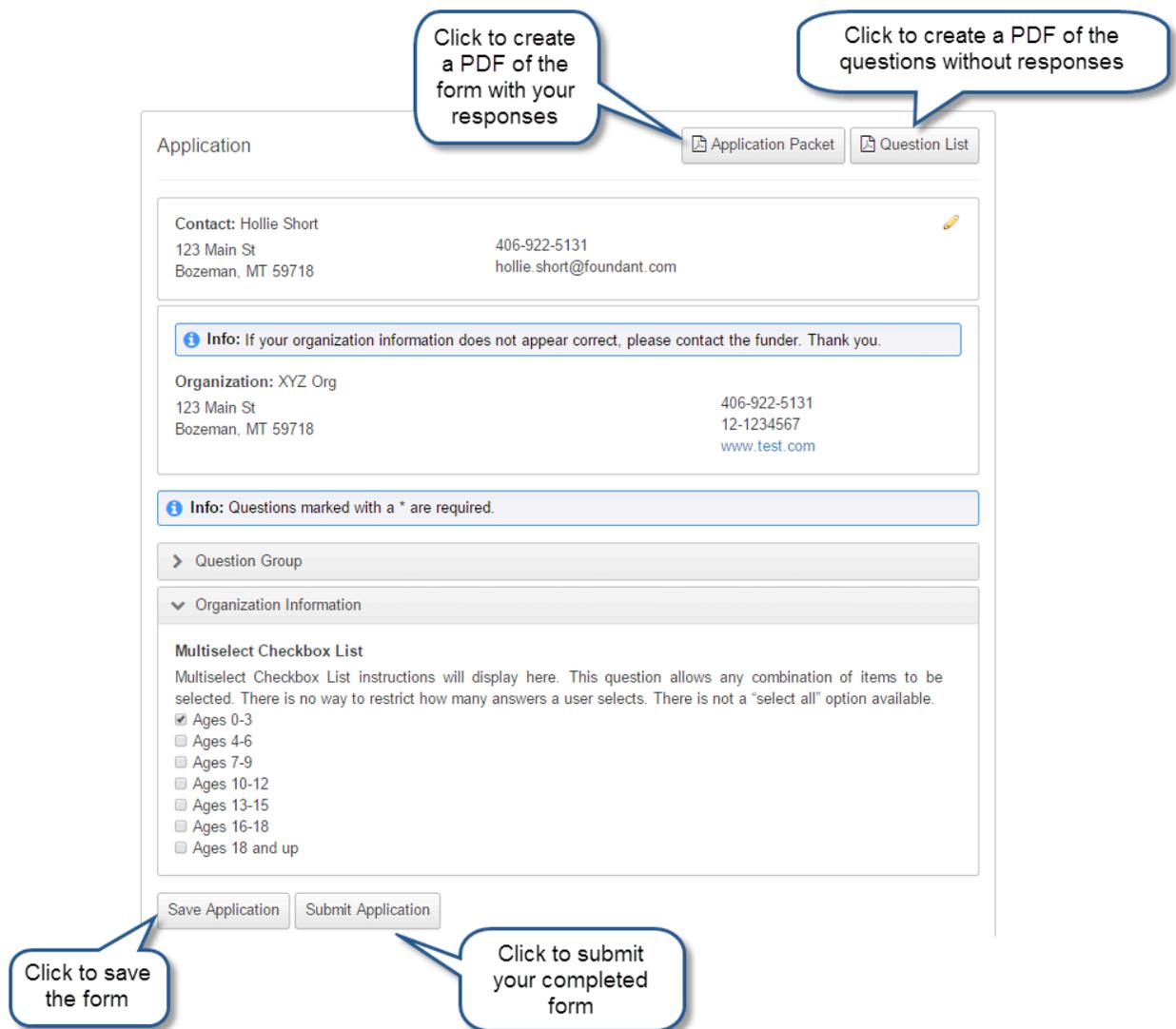
Organizations with distinct programming in both education and presentation that wish to request support in both areas, must submit a combined application. The purposes of both programs (education and presentation) still apply. A combined project budget should be submitted, not two separate project budgets. Organizations preparing a combined application are encouraged to consult with the Office of Cultural Affairs and/or submit a draft review.

[Filling out the Application Form](#)

After reading the applicant instructions, click on process name of application you wish to apply for, then you will be sent to the application form in the funding program. Enter all the applicable information then **Save as Draft** or **Submit** the form to OCA.

- 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. 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 Office of Cultural Affairs will not check for completeness until the form is submitted.



The screenshot shows an application form titled "Application". At the top right, there are two buttons: "Application Packet" and "Question List". Callouts 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 contains the following sections:

- Contact:** Hollie Short, 123 Main St, Bozeman, MT 59718. Phone: 406-922-5131, Email: 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. Phone: 406-922-5131, 12-1234567. Website: www.test.com.
- Info:** Questions marked with a * are required.
- Question Group:** A dropdown menu.
- Organization Information:** A section containing a "Multiselect Checkbox List" with the following options:
 - 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". Callouts point to these buttons with the text: "Click to save the form" and "Click to submit your completed form".

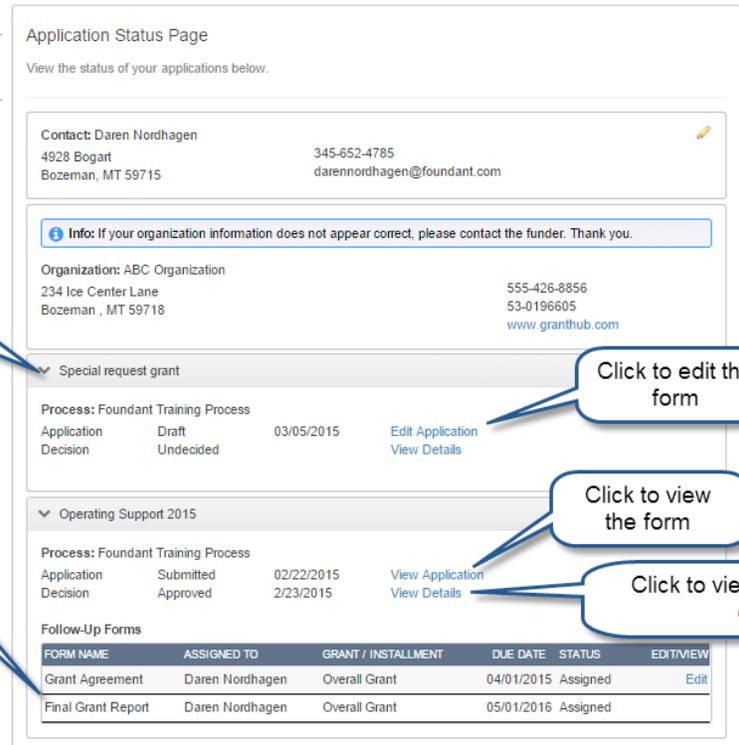
To create a PDF of all the questions in the application form, click **Question List**. To create a PDF of the form with your responses, click **Application Packet**. These tools are good if you wish to work on the application in a separate document on your computer before submitting online, or if you send application information to other members in your organization.

After the application is submitted, a confirmation page appears. You can always refer to your Application Status Page to see what stage the application is in, if in doubt.

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 funding request, download as PDF document, 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.granthumb.com

Special request grant

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

Operating Support 2015

Process:	Foundant Training Process
Application Decision	Submitted Approved
	02/22/2015 2/23/2015
	View Application
	View Details

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 expand/collapse arrow)
- Names of follow up forms assigned (points to the 'Follow-Up Forms' section)
- 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)