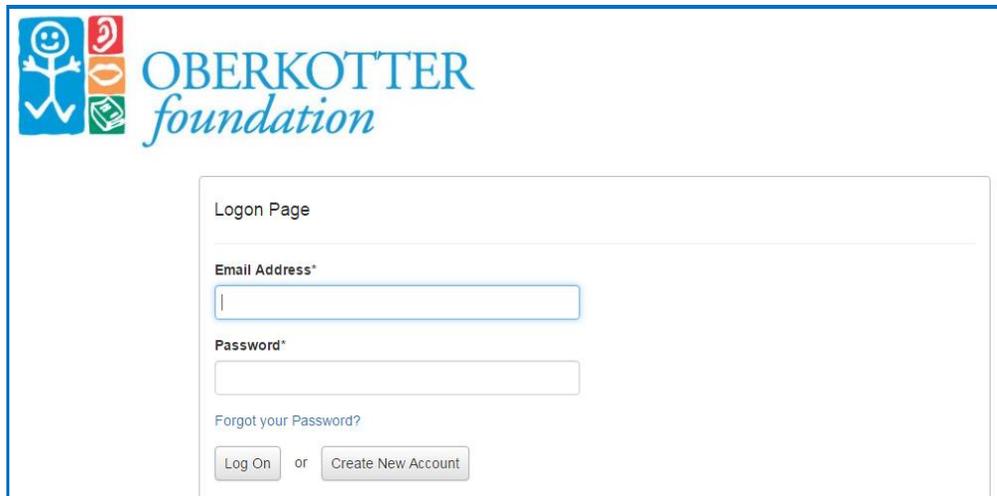


ONLINE GRANT APPLICATION INSTRUCTIONS

Overview

This document is designed to provide grant applicants with instructions for use of the Foundant Grant Lifecycle Manager application for grants from the Oberkotter Foundation. Remember that while this document attempts to provide step-by-step instructions, we realize that not all user scenarios may be adequately covered. In some cases, if you encounter problems, it may be a browser issue and you should try using a different browser to see if that solves the problem.

Logon Page

The screenshot shows the logon page for the Oberkotter Foundation. At the top left is the Oberkotter Foundation logo, which consists of four icons: a stick figure, an ear, a mouth, and a book, followed by the text "OBERKOTTER foundation". Below the logo is a form titled "Logon Page". The form contains two input fields: "Email Address*" and "Password*", both with asterisks indicating they are required. Below the password field is a link that says "Forgot your Password?". At the bottom of the form are two buttons: "Log On" and "Create New Account", separated by the word "or".

If you already have an account:

- Enter your **email address** and the **password** that you chose when you set up your account.
- Click the “**Log On**” button.

If you have forgotten your password:

- Click on the “**Forgot your Password?**” link and enter your email address, and you will be emailed a reset link.

If you are a new user and do not have an existing account:

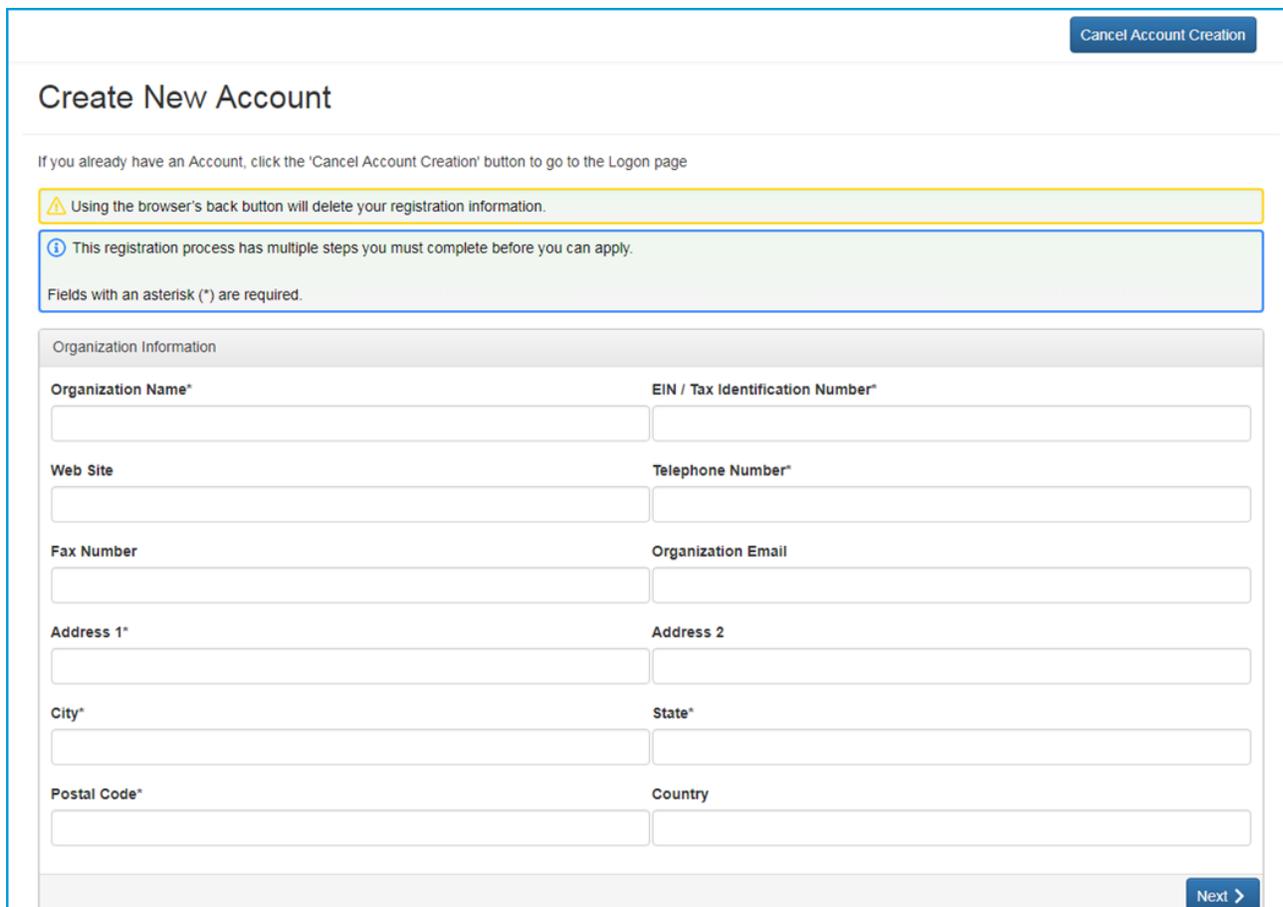
- Click on “**Create New Account**” button to register.

If your organization has been a past applicant or grantee with Oberkotter Foundation, the organization has login credentials established in the Foundation’s grant database and a primary contact has been

assigned to the organization for our records. **Please do not create a new organizational profile to reapply.** If you do not know your organization's username and password or if the primary contact needs to be changed, please contact David King, Grants Manager and Project Coordinator, (dking@oberkotterfoundation.org), for assistance.

To create a new account

- Creating an account is a multi-step process. On the first page we collect **Organization Information**; on the following pages we collect **Applicant Information** and **Executive Officer** information.



The screenshot shows a web form titled "Create New Account". At the top right is a "Cancel Account Creation" button. Below the title, there is a message: "If you already have an Account, click the 'Cancel Account Creation' button to go to the Logon page". A yellow warning box contains the text: "Using the browser's back button will delete your registration information." Below that, a blue information box states: "This registration process has multiple steps you must complete before you can apply." A note below the information box says: "Fields with an asterisk (*) are required." The form is titled "Organization Information" and contains the following fields:

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

At the bottom right of the form is a "Next >" button.

- Required fields are marked with an asterisk (" * ").
- Enter the requested organization information and click the "Next" button to move to the next stage of the registration process.

- When entering **Applicant Information**, you may use the “**Copy Address from Organization**” button to automatically pull the address information from the organization page.
- It is very important to note that the email address entered in the **email/login** field becomes the Applicant’s **Username/Login**.
- Click on the “**Next Step**” button to continue.
- You will be asked if you are the Organization’s Executive Officer. If you select “**Yes**” you will be asked to complete optional fields related to your position. If you select “**No**” you will be asked to enter the Executive Officer’s email address. Please note that by doing so, you **ARE NOT** creating a login for the Executive Officer. The Executive Officer will be listed as a contact on the Organization Summary page.
- Click on the “**Next**” button to continue to the password creation page and follow the directions for selecting a password.
- Click “**Create Account**” and you will be taken to the **Email Confirmation** page so that you can confirm you are receiving emails from the system. Follow the onscreen instructions and click “**Continue**” to finish the registration process.

Email Confirmation

i 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)', look in your junk or spam folder. To remove 'Administrator (administrator@grantinterface.com)' from your spam filter, use the link below.

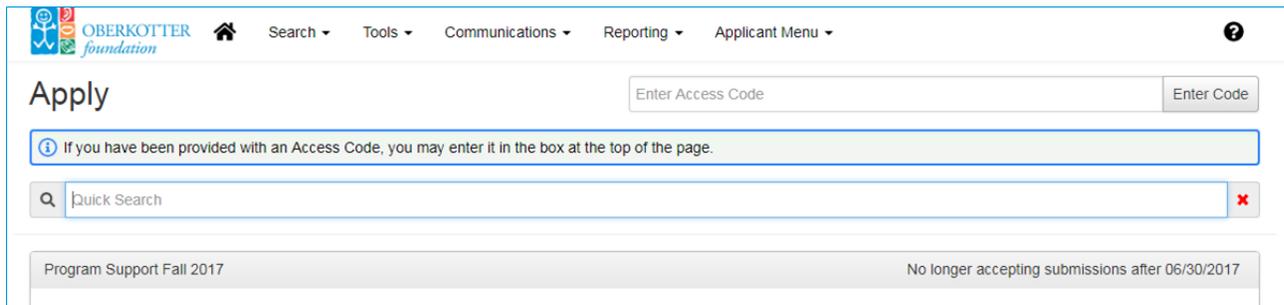
[Click Here](#) for a tutorial about removing email addresses from spam filters.

I have received the email
 Continue without checking
 I have not received the email

- Now you have an account in this system. This is the account you will use for all current and future applications for this organization

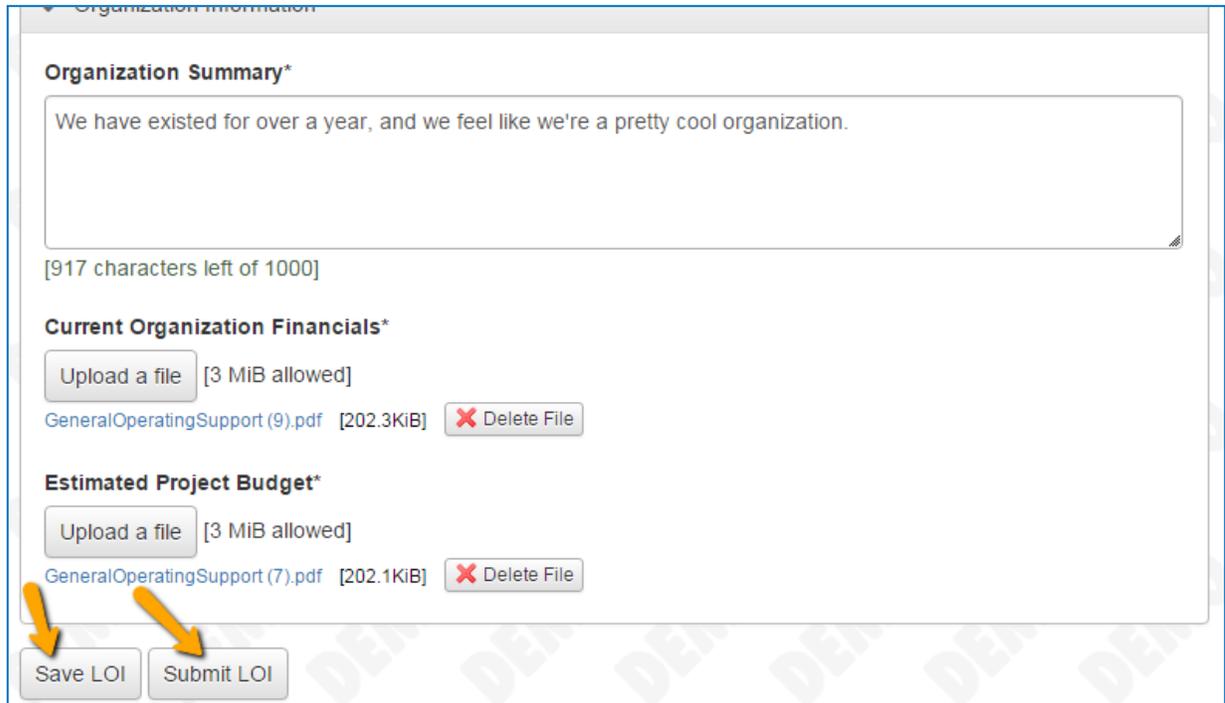
Apply Page

- Upon 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 or other information related to them.
- 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.



- You can preview the application without having to save any work by clicking on the “**Preview**” button. To start a request, click on the blue “**Apply**” button under the opportunity you’d like to apply to.
- In most cases, we use a two-stage application (with the first stage being referred to as an LOI on Foundant). When you click “**Apply**,” you will be taken into the LOI form. The LOI will be reviewed and if you are invited to submit a full application, that form will be made available to you on your Dashboard (see below).
- If you would like, you can begin by printing a list of questions to refer to. Click the “**Question List**” button in the upper right hand corner to download a pdf of the questions.
- Start completing the fields to answer the questions. Pay close attention to the instructions and limitations on each question.
 - Certain types of questions have limitations set by the Foundation. Text questions will have a character limit, including spaces, which allows you to type or paste only a certain amount in each question.
 - Another limit will be on the file upload questions. This limit will be in Mega Bytes (MiB). The size of file you are uploading must be under the amount of MiB’s allowed on the question. Once a file has been uploaded, it may be deleted by clicking the **red X** next to the file name and then a new file can be uploaded.
 - Some upload questions may also require a certain type of file (.docx; .pdf; .xlsx).
 - Questions marked by an asterisk (“ * ”) are required questions and must be answered before the application can be submitted.

- After you enter information into a field, the system will begin “**Auto Saving**” the application as a **Draft**. In addition, there is a “**Save**” button at the bottom of the form for Applicants to use. The button will take you to a confirmation page so that you know the Save was successful. You can return to the form by clicking “**Continue**”.



The screenshot shows a web form titled "Organization Information". It contains three main sections:

- Organization Summary***: A text area containing the text "We have existed for over a year, and we feel like we're a pretty cool organization." Below the text area is a character count: "[917 characters left of 1000]".
- Current Organization Financials***: Includes an "Upload a file" button with "[3 MiB allowed]" next to it. Below this, a file named "GeneralOperatingSupport (9).pdf" is shown with a size of "[202.3KiB]" and a "Delete File" button.
- Estimated Project Budget***: Includes another "Upload a file" button with "[3 MiB allowed]" next to it. Below this, a file named "GeneralOperatingSupport (7).pdf" is shown with a size of "[202.1KiB]" and a "Delete File" button.

At the bottom of the form, there are two buttons: "Save LOI" and "Submit LOI". Two orange arrows point to these buttons from the left side of the form.

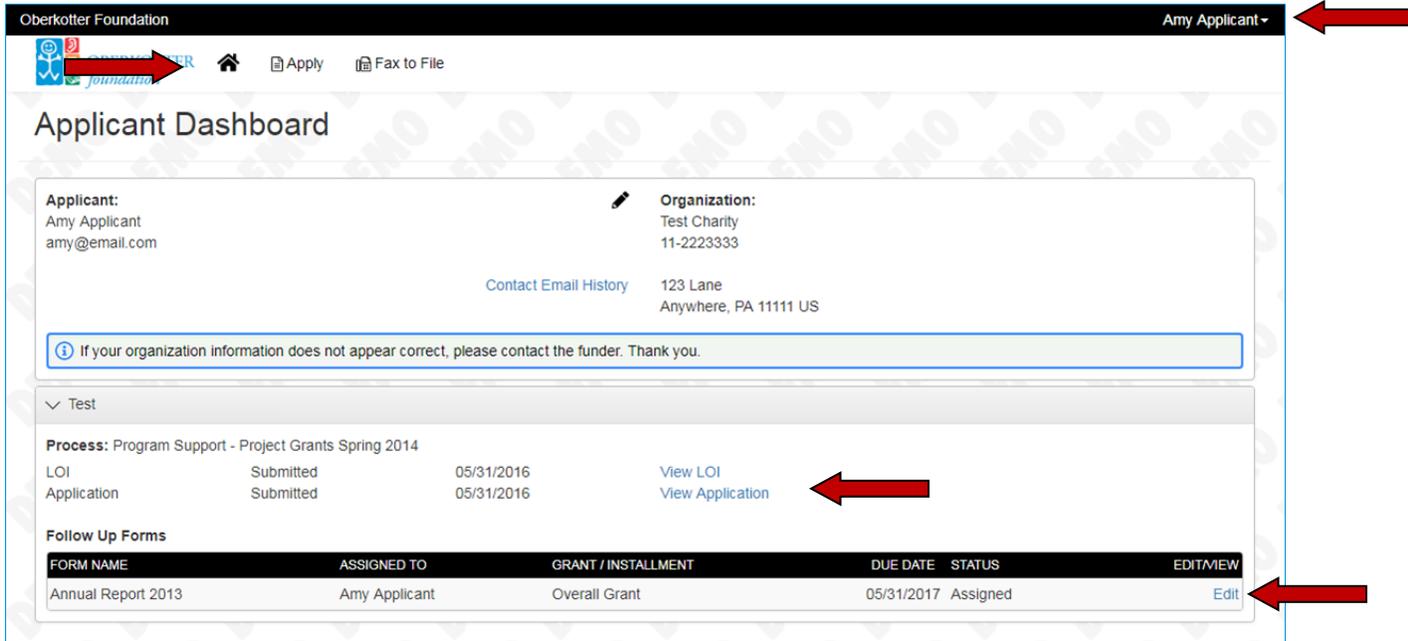
- After completing the application, click the “**Submit**” button. The button will take you to a confirmation page. In addition, a confirmation email will be generated and sent to you when you Submit a form. You will be taken to your Dashboard when you click “**Continue**”. You can always refer to your Dashboard to see what stage the application is in.

[Applicant Dashboard](#)

This is your homepage. After you create your account, you will automatically be taken to the Dashboard when you log-in in the future. You can return to the Dashboard at any time by clicking the “**Home**” icon in the navigation menu. From the Dashboard, you can:

- View and print requests that have been submitted;
- Edit applications that you have saved but not submitted; and

- Review, complete and submit new forms such as the application after an LOI has been accepted or the annual report form(s) (called “Follow-Up” reports) that are assigned to you as part of a grant.



Oberkötter Foundation Amy Applicant ▾

Apply Fax to File

Applicant Dashboard

Applicant: Amy Applicant
amy@email.com

Organization: Test Charity
11-2223333
123 Lane
Anywhere, PA 11111 US

[Contact Email History](#)

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

Test

Process: Program Support - Project Grants Spring 2014

LOI	Submitted	05/31/2016	View LOI
Application	Submitted	05/31/2016	View Application

Follow Up Forms

FORM NAME	ASSIGNED TO	GRANT / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Annual Report 2013	Amy Applicant	Overall Grant	05/31/2017	Assigned	Edit

In addition, there are a few particular features we would like to draw your attention to:

- **Apply** – This allows you to review the available grants and to start an application during the time period established for each of our grant cycles. If a grant process is restricted or is by invitation only, you will be given an Access Code by the Foundation that can be entered at the top of the page. At the bottom of each process you can “**Preview**” the form without creating a new one.
- **Collaborate** – If you would like multiple people in your organization to view or edit an application, click the “Collaborate” button on the upper right hand of the screen. You will then be send an email invitation to edit the proposal and specify whether the user will be able to change, view or submit the application. This can be helpful for having other team members check work, provide internal approvals, or work as a team on a project.
- **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. Click on “**Fax-to-File**” for instructions.
- **Edit Profile or Sign Out** – From the upper right hand corner, you can edit your profile or sign out.

Notes, Tips and FAQs

1. Uploading files:
 - a. Only one file can be uploaded per question. Multiple documents can be combined into one file to be uploaded. Single Excel spreadsheets may be uploaded, but Excel workbooks should not.
 - b. We suggest you convert files into pdf format before uploading so that all formatting is retained. The Fax-to-File feature on the grant management site will also convert your documents to pdf. Click on "**Fax-to-File**" for instructions.
 - c. If you upload the wrong file, click the **red X** and then upload a new file.
2. If you remain on a page with inactivity for longer than 90 minutes, you will be logged off for security reasons. You will receive a warning message at 80 minutes of the pending "time out". Please save your work regularly.
3. For a Video Tutorial created by Foundant: <https://drive.google.com/file/d/0B8P9ImR-APIbOVI5YVBFUWpXbnc/view?usp=sharing>