



United Way
Perth-Huron

Youth In Action Grants Getting Started Guide

If you have any questions throughout the process, please contact:

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Steps for Getting Started

- 1) View the Foundant Technologies video tutorial online at:
<http://www.foundant.com/applicant-tutorial.php>
- 2) Open your web browser and go to: <https://www.grantinterface.com/uwph/Common/LogOn.aspx>

The following page will be displayed:

A screenshot of the United Way of Perth-Huron logon page. The page header includes the United Way logo and the text "United Way of Perth-Huron". Below the header is a "Logon Page" section with two input fields: "Email Address*" and "Password*", each with a small green question mark icon to its right. Below the password field is a link that says "Forgot your Password?". At the bottom of the logon section are two buttons: "Log On" and "Create New Account", separated by the word "or". The Foundant Technologies logo is visible in the bottom right corner of the page.

Register and/or Log In

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

1. Enter your login, 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:

- 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.



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If you do not have an existing account:

- Click on Create New Account to register.



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technologies

Technology for Doing Good, Better.

The screenshot shows a 'Logon Page' with the following elements:

- Email Address***: A text input field with a question mark icon to its right. A callout bubble points to it, stating: "Applicants who have previously registered can enter their account by entering their User ID (Email Address) and Password".
- Password***: A text input field with a question mark icon to its right. A callout bubble points to it, stating: "Click here to enter your User ID (Email Address) and receive your password via email".
- Forgot your Password?**: A blue link text. A callout bubble points to it, stating: "Click here to enter your User ID (Email Address) and receive your password via email".
- Log On** and **Create New Account**: Two buttons separated by the word "or". A callout bubble points to the "Create New Account" button, stating: "New Applicants must register themselves and their organizations".



To register

1. Click on Create New Account
2. If you do not have a Tax Identification Number, you can enter '12-1234567'.
3. Enter your personal contact information
4. Enter your organization's contact information
5. Click on the Proceed to Next Step button

(See diagram on next page)



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Register
Enter your contact information below.
* = Required Field

User Information Please provide contact information for the person submitting this request.

Salutation ?

First Name* ?

Middle Name ?

Last Name* ?

Suffix ?

Business Title ?

Address 1* ?

Address 2 ?

City* ?

State/Province* ?

Postal Code* ?

Country ?

Phone Number ?

Mobile Number ?

Fax ?

Email* ?

Organization Information
Please provide contact information for the Chief Executive of the organization.

Organization Name* ?

Tax ID/Registered Charity Number* ?

Web Site ?

Salutation ?

First Name* ?

Middle Name ?

Last Name* ?

Suffix ?

Business Title ?

Address 1 ?

Address 2 ?

City ?

State/Province ?

Postal Code ?

Country ?

Phone Number ?

Mobile Number ?

Fax ?

Email ?

Proceed to enter password and finish registration

Applicant Information

Organization Information

Proceed to enter password and finish registration



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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.
 - a. After entering the passwords click save
2. If you wish to change your password, log on to your account and click on Edit Contact. This will allow you to change your information.

Follow the steps 'To register an account' on pages 4-5 and 'Entering a Password' on page 6 of the Applicant Guide.

Opening the Application

Once you are registered, you will automatically be taken to the status page.

1. To access the applications, click 'Apply' in the left hand column (see below figure).


Submit Application - Windows Internet Explorer

https://www.grantinterface.com/Application/Apply.aspx?eqs=rFdl2EVQlgGqu1P3Vpawrw2

File Edit View Favorites Tools Help

Google Search Share Check Translate AutoFill

Submit Application

United Way  **of Perth-Huron**

Welcome
Log Off

requests

Apply

Status

tools

Fax to File

Access Code

Application Page

? If you have already registered, please log on to begin your application. If this is your first visit, please click the link below to begin the application process.

Filling out the 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 United Way of Perth-Huron.



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- 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 United Way of Perth-Huron. 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 United Way of Perth-Huron will not check for completeness until the form is submitted.
 - a. 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.

Completing a Form

The screenshot shows the 'Application Page' for 'Foundant Example 2'. The page includes a navigation menu on the left with 'requests', 'Apply Status', 'tools', and 'Fax to File'. The main content area has a header with the Foundant logo and the slogan 'Technology for Doing Good, Better.' A user greeting 'Welcome Betty Log Off' is in the top right. A warning bar states: 'To avoid losing your work, please Save As Draft a minimum of once per hour.' Below this, a note says '* = Required Field'. There are links for 'Print Question Legend' and 'Print Packet', with a callout stating 'Printing will convert the form to a PDF file for printing'. The 'Contact Information' section shows details for Betty Bloomer. The 'Project Name*' field is empty. The 'Amount Requested*' field is empty with a '\$' symbol. The 'Organization Dates' section asks for the establishment date. The 'Mission' section has a text area with a '3000 characters of 3000 left' limit and a 'Character Limit' callout. The 'Board Members' section has a text area with a '500 characters of 500 left' limit and an 'MB Limit' callout. A file upload section shows 'Browse... [2 MB(s) allowed]' and '[File Upload Status: No file uploaded.]'. At the bottom, there are 'Save As Draft', 'Cancel', and 'Submit Form' buttons. A callout for 'Save As Draft' says 'Save form and keep working'. A callout for 'Submit Form' says 'Submit the form to the Foundation. Once submitted, no changes can be made.'



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[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 grant then you can only view the grant and print it.
2. If you saved the form then you can Edit the saved form from the Application Status Page.

Application Status Page

The screenshot shows the Foundant Application Status Page. At the top left is the Foundant Technologies logo. The main header reads "Technology for Doing Good, Better." and "Welcome Betty Log Off". A sidebar on the left contains "requests" (Apply Status) and "tools" (Fax to File). The main content area is titled "Application Status Page" and includes contact information for Betty Bloomer. Below this is a table of applications with callouts: "Submitted LOI awaiting the foundation for approval and to complete the application" pointing to a "Submitted" LOI, and "Saved form that can still be edited before submitting" pointing to a "Draft" application.

Application Status Page				
View the status of your applications below.				
Contact Information		Betty Bloomer 851 Bridger Drive Ste. 1 Bozeman, MT 59715 example@foundant.com		Edit Contact
Test				Foundant Example # 2
LOI	Submitted	08/23/2010	View LOI	Awaiting Foundation Action
Application	Draft	08/23/2010	Edit Application	Foundant Example #1



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Key Points to remember when using the web-based application system:

- Always make sure that your contact information is correct. The system will send out notifications via email to applicants and if the email address is not correct, you may miss receiving important information regarding your application(s).
- Always open the 'Apply' section in the left-hand column. All applications that are available to your agency/organization will appear in this area. If you do not check this area, you may miss a submission deadline. You may be required to input a password (in the left-hand column of the 'Apply' page, provided to you by United Way of Perth-Huron if an application is restricted).
- If you remain on a page with inactivity for longer than 40 minutes, you will be logged off for security reasons. To ensure that you do not lose any work, please save every 15-25 minutes.
- Do not open more than one session at one time. If you open more than one session you will risk overwriting your work and will lose your information.
- Please proofread your full application prior to submitting. Your computer may not automatically indicate spelling and grammatical errors that you enter in your application.
- There is a 'Help' Tool at the bottom of the left-side column that can also guide you through your application process.

Problem Solving

Problem	Solution
Issue logging in or error messages when using the system	<i>If there is an issue with the system and it is afterhours, you can email Foundant at http://foundant.custhelp.com/app/ask. Please only email Foundant with issues logging in or error messages. All questions regarding the applications should be directed to Megan Whittaker at UWPH.</i>
Cannot save application	<p><i>The Foundant system will be blocked from saving when you have an error in your page. If your work has been successfully saved, a confirmation page will be displayed indicating that your work application has been saved (Figure 1). If you do not see the confirmation page after saving, make sure that our application does not contain any errors before moving forward.</i></p> <ul style="list-style-type: none"> • <i><u>Example 1</u> – If you have answers a question and gone over the character limit, the Foundant system will not allow you to save until this error is corrected as it does not have the room to do so. There will be a red error message at the bottom of the section with the error to indicate what needs to be corrected (Figure 2).</i>



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	<ul style="list-style-type: none">• <i>Example 2 – If you upload a file that is over the MB's limit, the Foundant system will not allow you to save until this error is corrected.</i>
Cannot spellcheck	<p><i>Issues with spellchecking are due to the Internet Brower that you are using. Internet Explorer does not have the capability to spellcheck automatically.</i></p> <p><i>Mozilla Firefox, Safari and Google Chrome browsers so allow for automatic spellcheck. These internet browsers will underline the error in red as you are typing. These browsers can be downloaded for free off of the internet and have the same capabilities as Internet Explorer.</i></p>

Figure 1

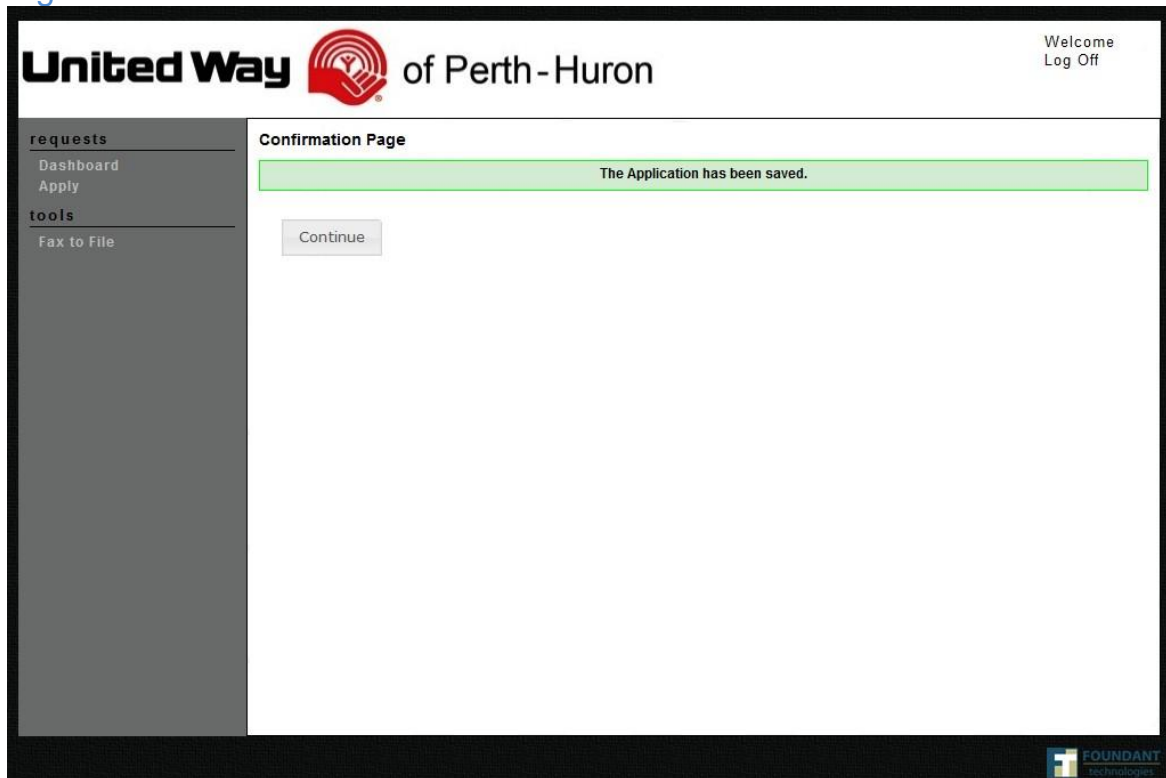


Figure 2




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Application Page

Current Process: 2012-2013 Funded Agency Application

* = Required Field

 [Print Question Legend](#)

Agency/Organization Name*

Program/Service Name*

• Example 1 – If you have answers a question and gone over the character limit, the Foundant system will not allow you to save until this error is corrected as it does not have the room to do so. There will be a red error message at the bottom of the section with the error to indicate what needs to be corrected.

[214 characters over the limit of 100]