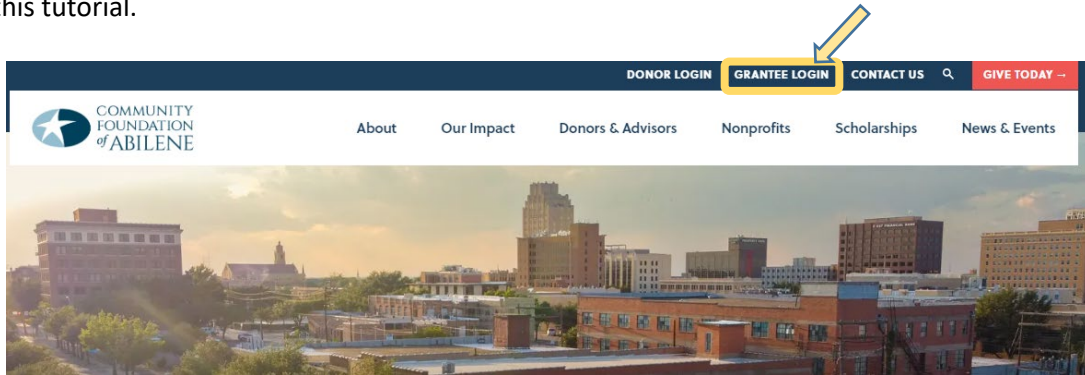**COMMUNITY FOUNDATION of ABILENE**

Grant Lifecycle Manager (GLM) Applicant Tutorial

Site Access and Account Creation

You can access the online grant system via the Login page here, or via the Grantee Login button in the top banner of the cfabilene.org site. Community Foundation of Abilene may be abbreviated as "CFA" or the "Foundation" throughout this tutorial.

We recommend 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.

*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.

Snapshot of Login Page *(see the full-size version online)***:**

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Create a New Account

Creating a new account is a multi-step process, follow the instructions below to create a new account. You will receive a warning if your organization's tax ID number is already associated with an account. If this occurs, contact the Foundation. *Do not create a new account.*

1. From the Logon page, click **Create New Account.**
2. Required fields are marked with an asterisk. 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.
   - 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 receive an automated email and be taken to the Email Confirmation page, to confirm that you are receiving emails from the system.

Check your spam if you don't see it. Add "administrator@grantinterface.com" to your safe senders list.

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

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 associated with the opportunity you'd like to apply to.

- This will take you to a form to complete and submit.
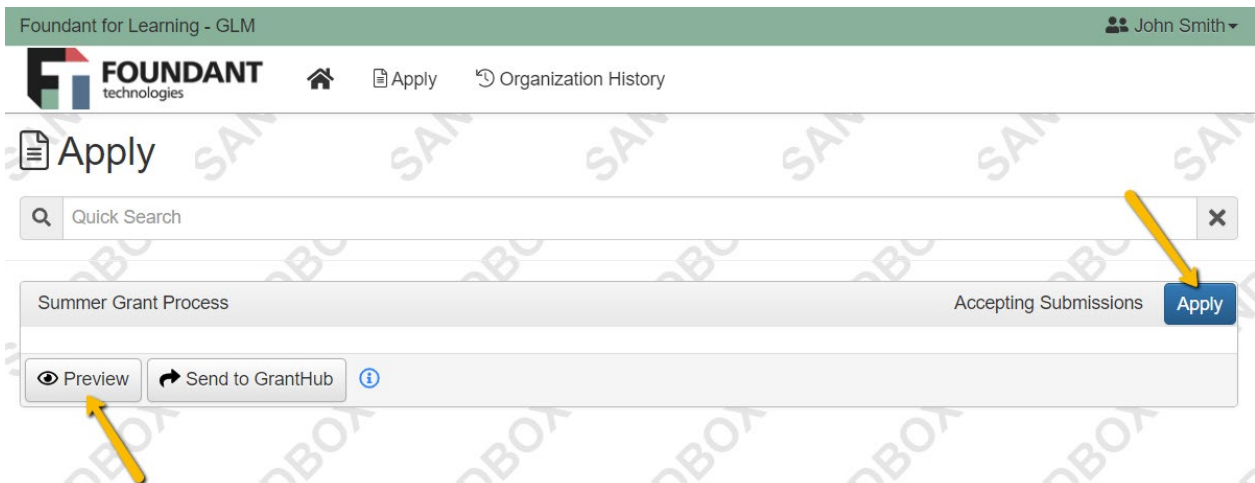
4. Once in the form, note that your contact and organization information automatically populates at the top of the form.
   - You may update your contact information and view your email history using the pull-down menu under your name in the top right corner of the dashboard and selecting *Edit My Profile*.
   - You must contact the Foundation directly to change any organization information.
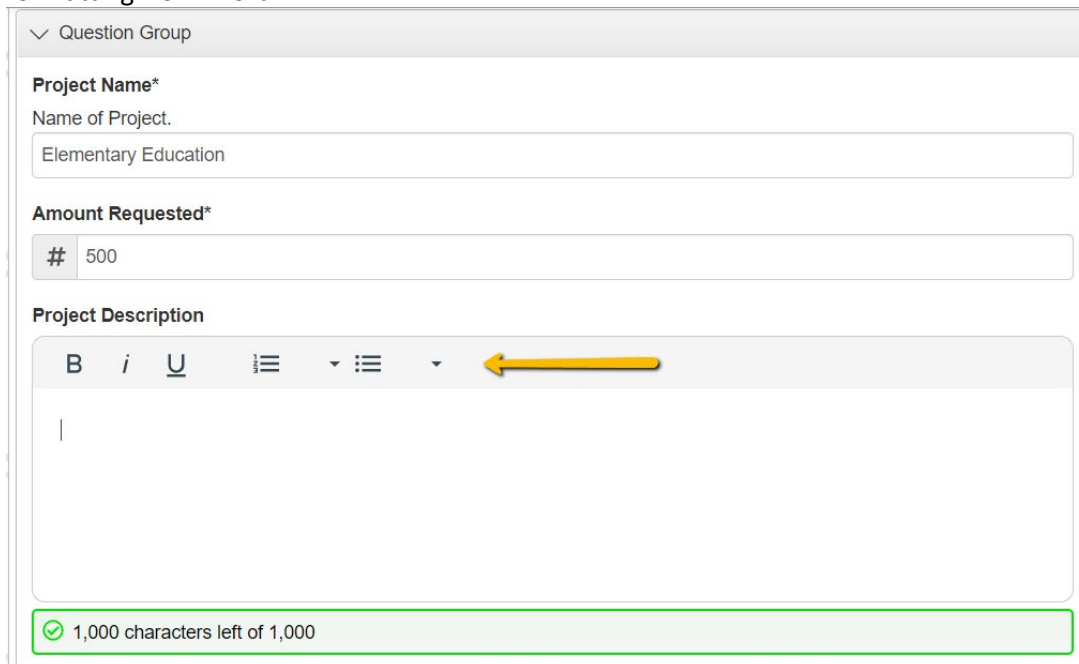5. If you'd like a PDF copy of the application, you can click the Question List button.
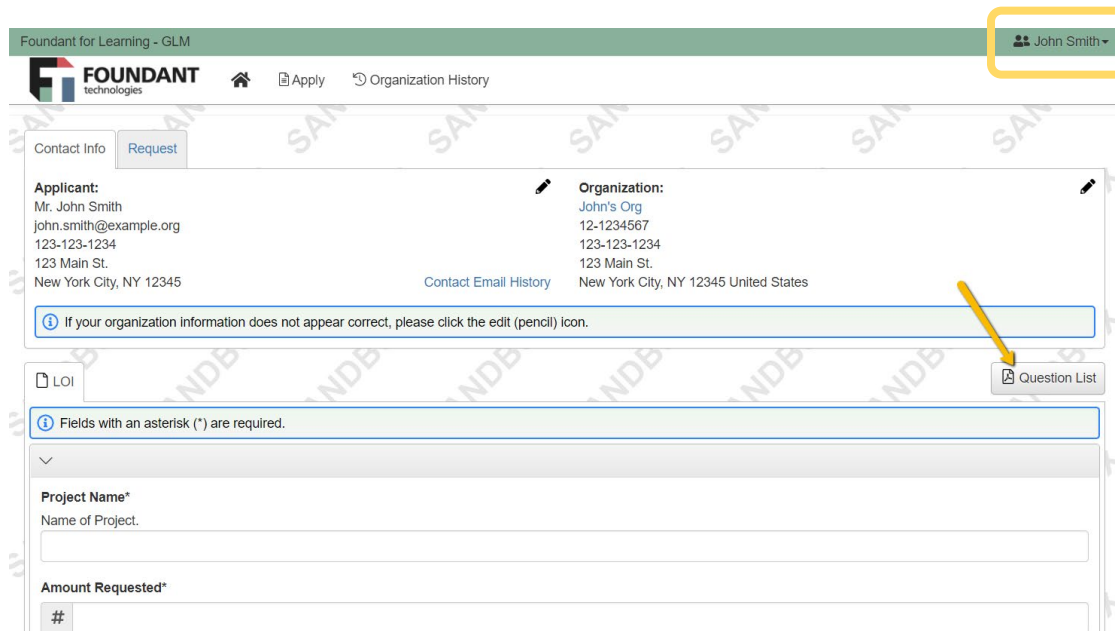
6. Please note that if the form has a specific deadline it will be listed at the top of the form.
   - If the past due message is reflected in red, you no longer have the option to submit the form.
   - You will not be able to submit an application in the grant system after the deadline has passed.
7. Once you've completed the form, you may click the Packet button to download a copy of the questions and your responses. *Review this prior to submitting, to be sure it includes all the information you have entered and uploaded.*

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Detailed Apply Information

1. 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. The response will need to be shortened before the system will allow application submittal.
2. **File upload fields will only accept one file per field**. If you have multiple documents to upload to a field, combine them first. PDF documents are the preferred format.
   - Upload fields have size limits.
   - 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.
   - Upload fields may also have file type restrictions.
   - 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.
   - 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.
   - If you attempt to upload another file, it will replace the previous file.
3. 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.
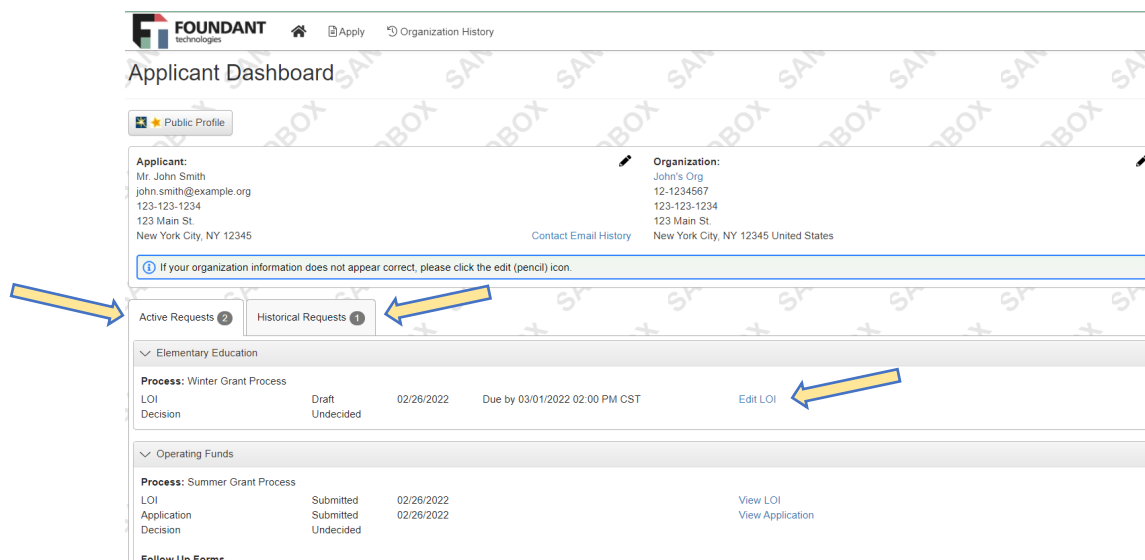

   - Click a button in the editor (e.g. the B button for bold text) and then type. The formatting will be applied to the text that you type (e.g. the text you type will be bold).
   - Click the button in the editor again to stop using that formatting when you continue typing.

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- 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.

4. 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.

5. You may abandon the request if it is the first form to be submitted for this request.
    - After selecting Abandon Requests, you must type in "ABANDON REQUEST" and click OK.
    - The request will then be visible in the Historical Requests tab just as it would if an administrator had abandoned the request.
    - Once the Application has been submitted, you must contact an administrator to withdraw the request from consideration, if applicable.

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 and receive a confirmation email. Check your spam folder. Be sure "administrator@grantinterface.com" is on your safe senders list. If you do not receive a confirmation email, your application has not been received by CFA.
    - 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 Active and Historical requests.

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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 grant cycle.

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, you will likely bed required to 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.
- In some instances, you may be allowed 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.

Contact the Foundation if organizational information needs to be updated.

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).

Contact the grants team at the Community Foundation of Abilene with any questions. 325-676-3883