CENTRAL CAROLINA COMMUNITY FOUNDATION

Grant Portal Tutorial for Applicants

Thank you for your interest in applying to a grant from Central Carolina Community Foundation! Our online grant portal makes it easy for your organization to apply for and manage grants with CCCF. Below are tutorial instructions for using the portal. Use the quick links below to jump to a specific section.

Before beginning your application, visit our *Before You Start* webpage and the webpage of the specific Grant Opportunity you are applying for to view the grant criteria, timeline, and other important details.

Click the links below to jump to a specific section of this document:

SITE ACCESS & ACCOUNT CREATION

To access the system, click here to go to the logon page. It's recommended that you bookmark the portal 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 click on the **Create New Account** button. If at any time after creating an account, you can't remember your password, you may click on the **Forgot Your Password** button, enter your email address, and you will be sent a link to reset your password.

CREATE NEW ACCOUNT: [(Access Video Tutorial Here)]

Creating a new account is a multi-step process;

- with the first section collecting **Organization Information**;
- the second section collecting **User Information**;
- and sections three and four collecting **Executive Officer** information.

- After Organization Information has been entered click on the **Next** button.
- The next section is the "User Information" section, or 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.
  - It is very important to note that the email address entered in the **Email/Username** field becomes the Applicant's **Username** in the system**.**
- Once the fields on the "**User Information**" section are completed, click on the ***Next*** button.
  - Please note that 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 their browser's **back** button you will lose all registration information entered.
- In the next section you indicate if you are the Organization's Executive Officer.
  - If you are the executive officer, select "**Yes**." 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 "**No**," and complete the required Executive Officer fields.
- Once the executive officer's information is entered, click on the "**Next"** button to create a password.
- Password requirements are listed at the top of the section, so the applicant can create their password accordingly.
- Once the password is created, the applicant clicks the "**Create Account"** button.

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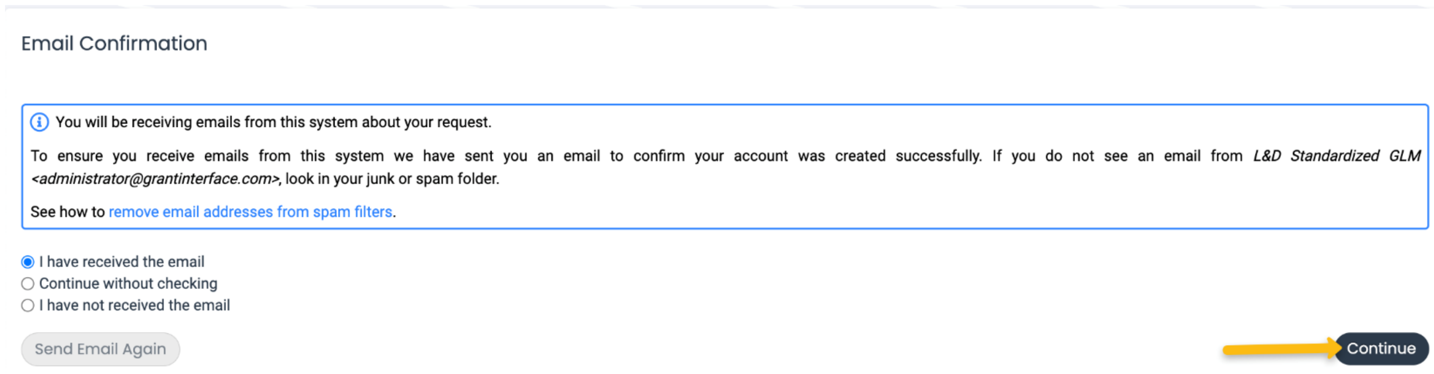
EMAIL CONFIRMATION:

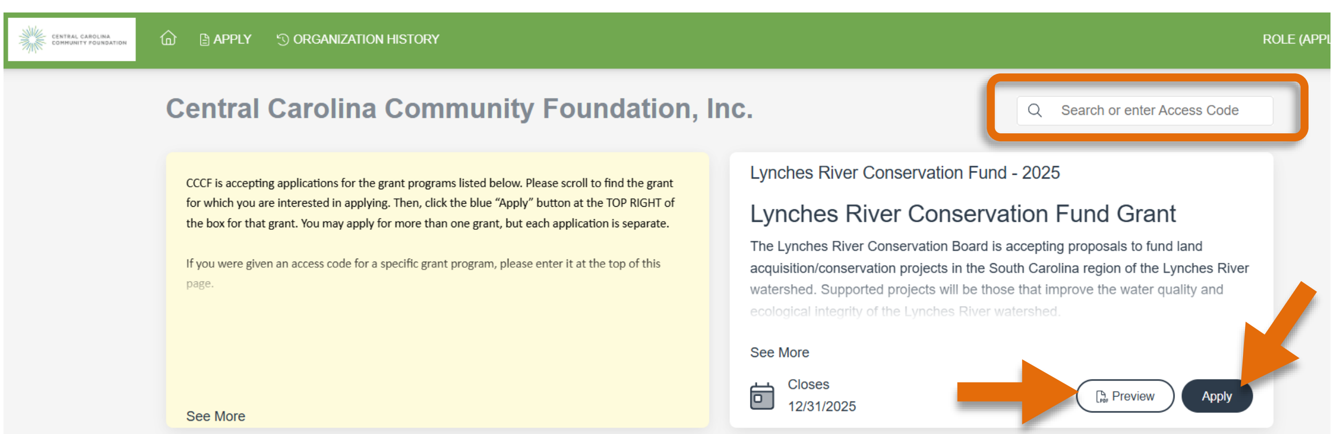
Upon clicking Create Account you will be taken to the Email Confirmation page, so you can confirm that you are receiving emails from the system. Follow the onscreen instructions and click the "Continue" button to finish the registration process. Now you have an account in this system, and remember, this is an account that you will use for both present and future applications.



APPLYING FOR FUNDING:

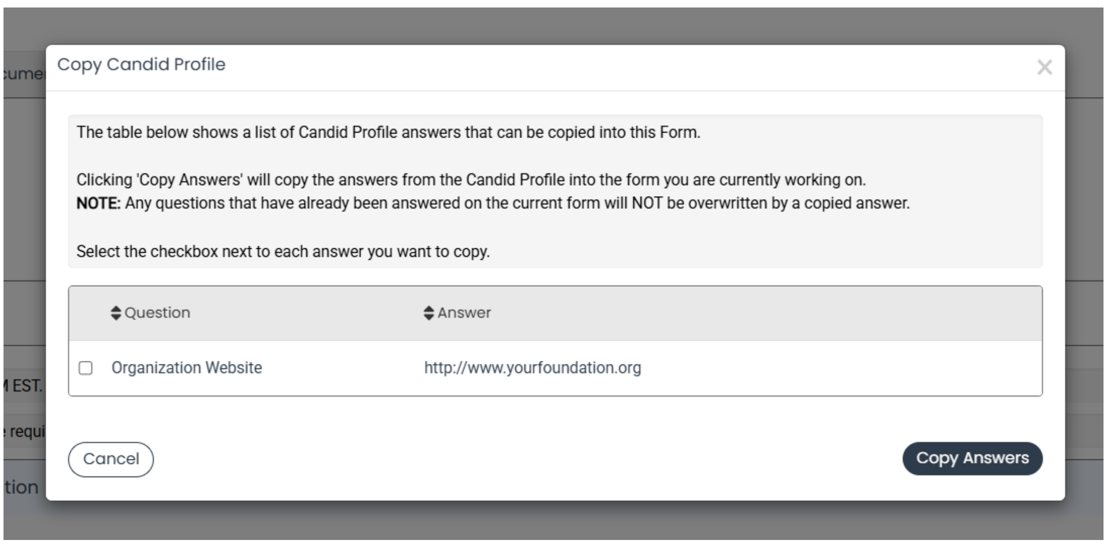
Upon completing registration and accessing the system for the first time, you will land on the **Apply Page**. This page will show you any currently open opportunities that you can apply for, as well as any relevant deadlines and other applicable information related to them.

- 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 **"Apply"** button under the opportunity you'd like to apply to.
    - Clicking **Apply** will take you into a form to complete and submit. Depending on the grant the form will likely be an LOI or Application. In this example, you are taken directly into the application.

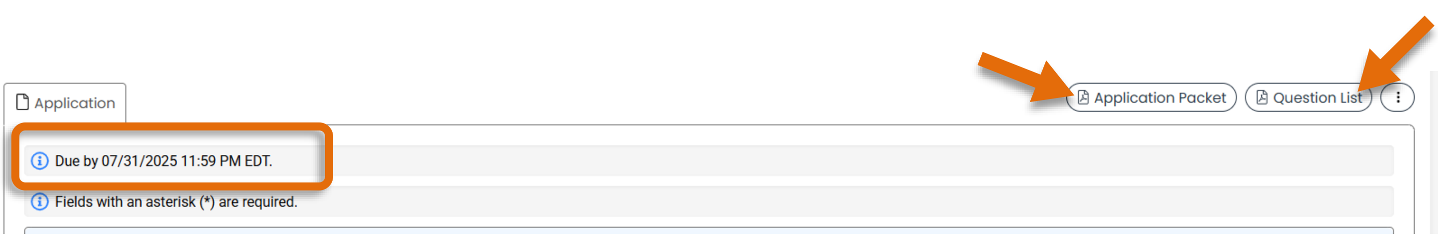


Once in the form, note that your contact and organization information automatically populates at the top of the form.

- You may update your contact information and view your email history.
  - Organization contacts are able to update organization information. You will see the edit icon next to the Organization Information.
- Most of our grant applications contain Candid Profile answers that can be copied into the application form. A window will immediately pop up asking if you would like those answers copied from your Candid profile.
  - If you have not filled out your Candid profile, you can still fill out the Candid questions manually, just like any other question type.
  - You may edit Candid questions in GLM after copying answers from Candid.
  - Editing Candid questions in GLM will **not** impact your Candid profile.
  - Pulling in a response from Candid will **not** overwrite an existing response on a GLM form.
  - Since this is based on your Tax ID, if you are fiscally sponsored, you will need to fill in the information manually. If you have questions, contact the Foundation.



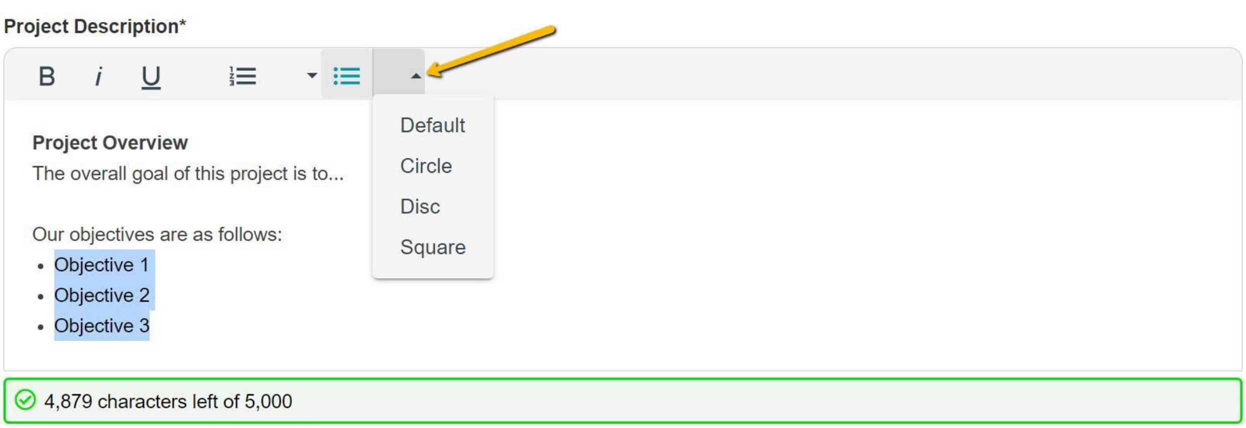
- If you'd like a PDF copy of the application, you can click the **Question List** button.
- Once you've completed the form, you may click the **Application Packet** button to download a copy of the questions and your responses.
- Please note that if the form has a specific deadline, it will be listed at the top of the form.



  - In most cases, you will not be able to submit after the deadline has passed.
    - 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.
      - If you are not allowed to submit, you will receive a message should you attempt to submit.

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 questions have **character limits.**
  - You will not be allowed to submit the form until the length of your responses to these questions fits within the character limits.
  - Responses that are longer than the limit will be saved, but an error message will appear informing you that the limit has been exceeded.
- **File upload questions** only accept one file per question.
  - If you attempt to upload a file that is larger than the limit, you will receive an error message informing you that the file is too large and the file will not be saved.
  - If you attempt to upload a file in an unaccepted file type, you will receive a warning that the file type is not acceptable; you will not be able to upload the file.
  - Once a file has been uploaded, it can be **deleted** by clicking the **X** icon next to the file name.
- 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.
  - 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.

- Even though the system is auto-saving there is still a "**Save"** button at the bottom of the form.
    - When you click save you are taken to a confirmation page so you know the save was successful.
        - 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.

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

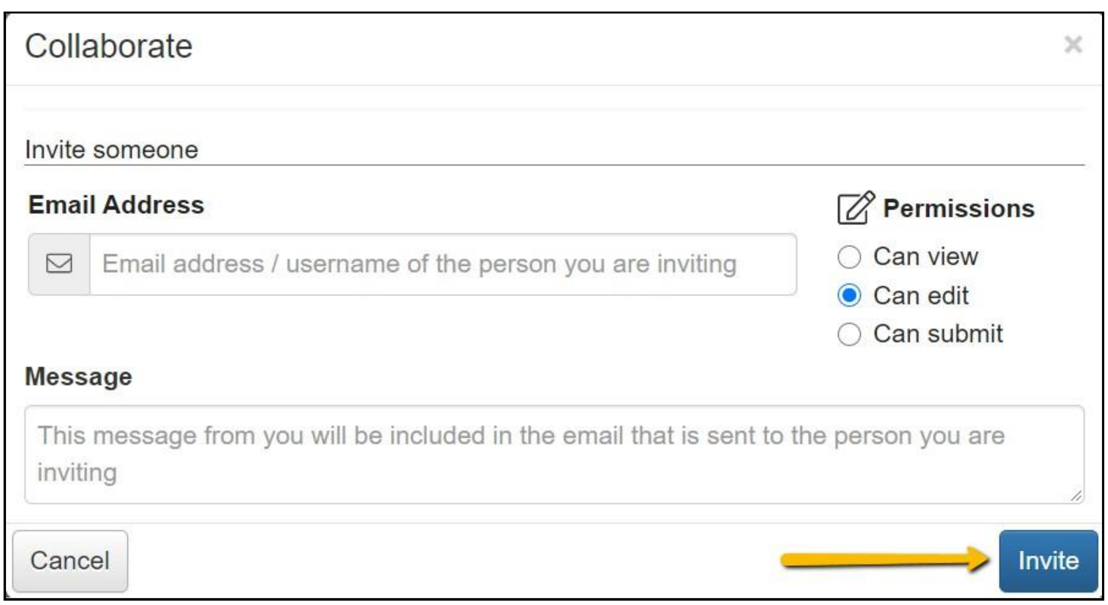
When all the fields are complete, submit the application.

- 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.
    - When you click "**Continue"** you are taken to your dashboard where you can VIEW your submitted request.
    - Note, that once an application has been submitted you can no longer edit it.

INVITING COLLABORATORS TO YOUR REQUEST [(Access Video Tutorial)]

- Click **Collaborate** in the upper right corner of the screen as you're working on a form within your request (e.g. the LOI, application, a follow up form).

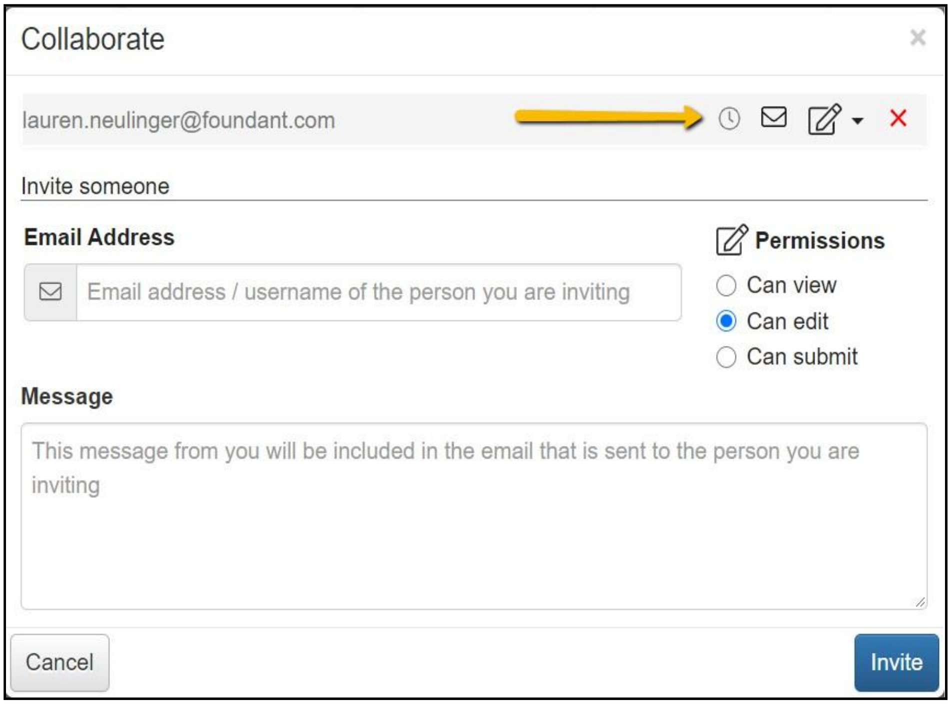
- In the pop-up that appears:
    - Enter the email address for the person you'd like to collaborate with on your request. Multiple people may be invited as collaborators.
    - Type a message to that person, letting them know what you need them to do.
    - Select the permission level for this collaborator (view, edit, or submit).
    - Please note: these collaborator permissions apply to all forms within your request (e.g. the application and any follow ups assigned to you). If you select edit, for example, the collaborator can edit any forms within your request.
    - Click **Invite**.



- The system now sends an email invitation to the collaborator.

- After sending the invitation you'll see options in the pop-up for managing the collaborator you just invited (as well as any other collaborators you already invited).

  Here you can:
  - View the status of the invitation (i.e. whether or not it's been accepted).
  - Resend the invitation.
  - Edit the collaborator's permission level.
  - Remove the collaborator from your request.



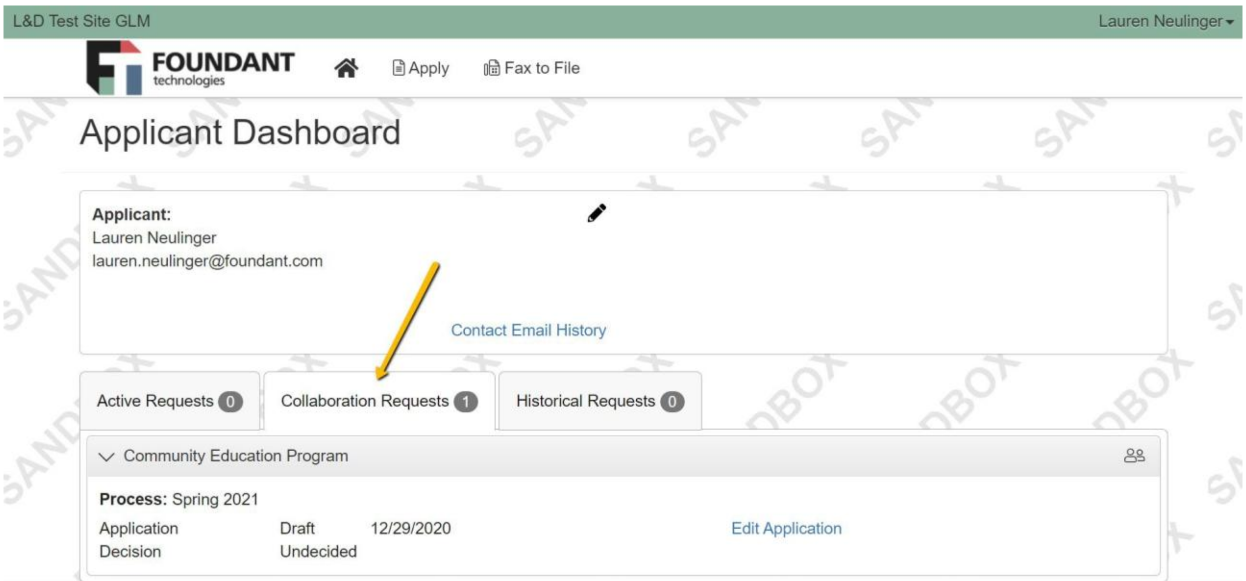
COLLABORATOR EXPERIENCE

- After you click **Invite**, the collaborator receives an email from the system with your message and a link to log on. Below is an example of this email.

> You have been invited to collaborate on Community Education Program by Emily Roberts (emily.roberts@mayberry.org).
>
> **Message from Emily:**
> Hi Lauren, Here's the link to collaborate on our 2021 application to this foundation. Please read through it and make any edits as needed! Thanks, Emily
>
> Your username is: lauren.neulinger@foundant.com
>
> You can register or log on here.

- When the collaborator clicks the link in the email, they're brought to the **Register** page (if they haven't already registered for an account).
    - Once they've registered, clicking the link will bring them to the Logon page.

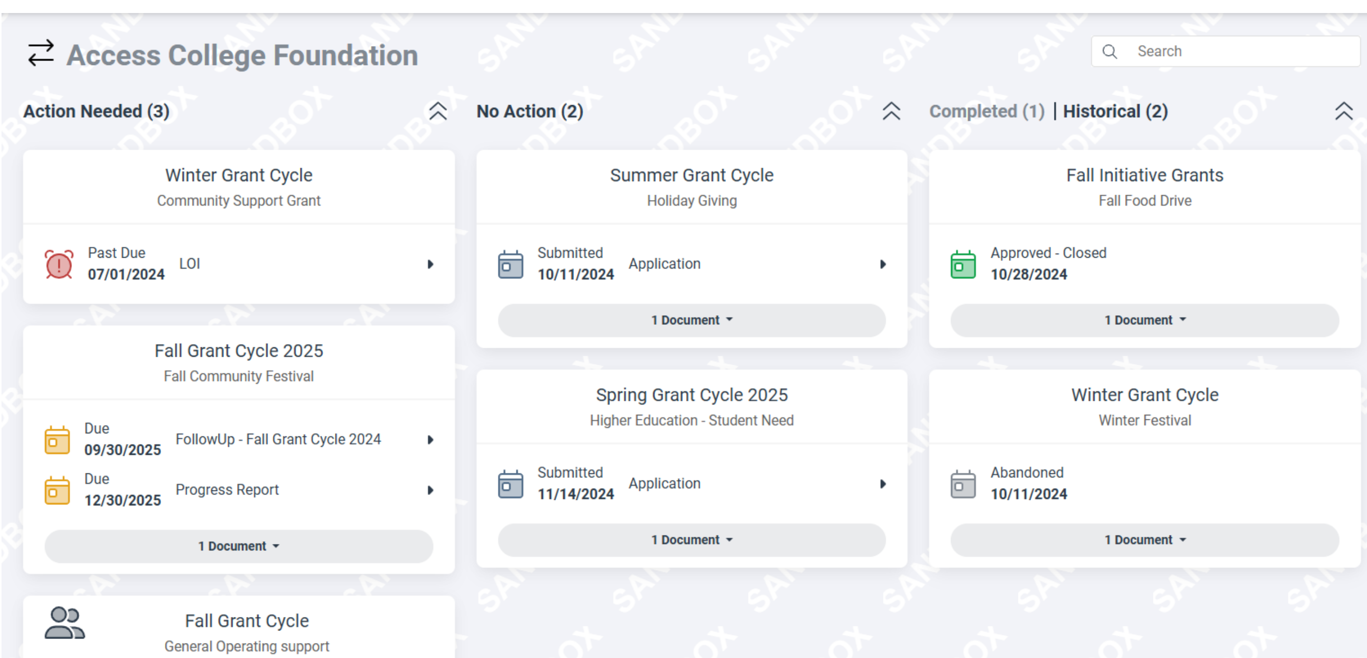
- After registering or logging on, the collaborator lands on their dashboard. The request you invited them to collaborate on is located in the **Collaboration Requests** tab.
- They'll see a link to view or edit (depending upon their permissions and the status of the form) each available form in your request.



YOUR APPLICANT DASHBOARD

Your dashboard houses current and historical requests.
Click the Home icon to access your Dashboard.

- There are three columns on your Dashboard.
  - **Action Needed** - Contains your draft requests and any approved requests that are due and still need action.
  - **No Action** - Contains requests that do not need further action from the applicant as administrators process the request.
  - **Completed/Historical**
    - **Completed** - Contains requests that have been approved and have had all follow ups marked complete.
    - **Historical** - Contains any of your other requests that are no longer active. (requests that have been closed, denied, or abandoned.)



The actions you can take on forms for a request depend upon the form's status.

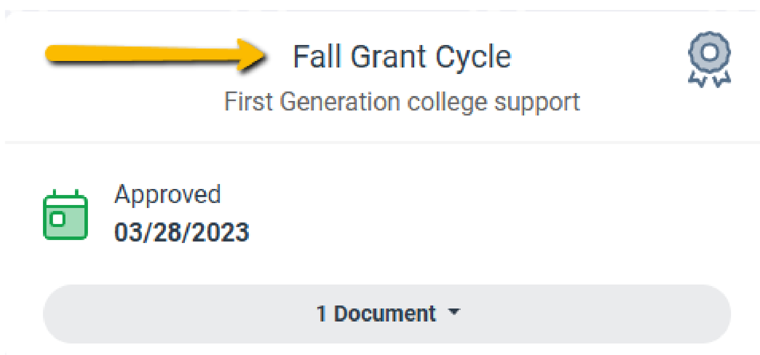
- You may view forms that have been submitted but note that once submitted you cannot edit them.
- You can also see the request's decision status.
    - The status will be "**Undecided**" until the site administrator posts a decision.
        - Timing on decision status updates vary depending on the grant. All grant timelines are posted on the Foundation website.

- **Denied requests and requests marked closed** by the site administrator are housed in the Historical Section.

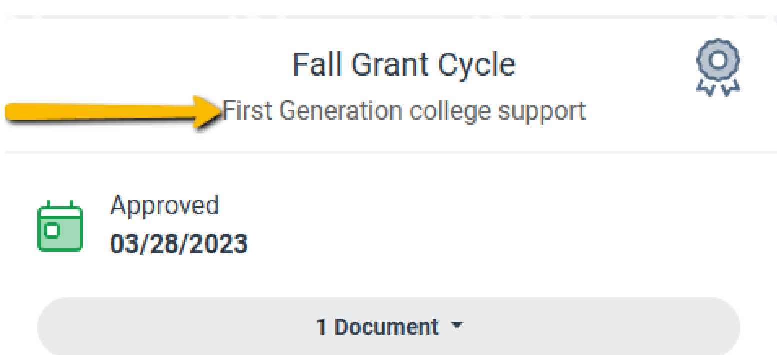
- For an **approved request**, click the request header to see the Award Details tab. This displays more information about the grant award.

    If your request is approved, you may be assigned Follow Up Reports to be completed and submitted through the system.

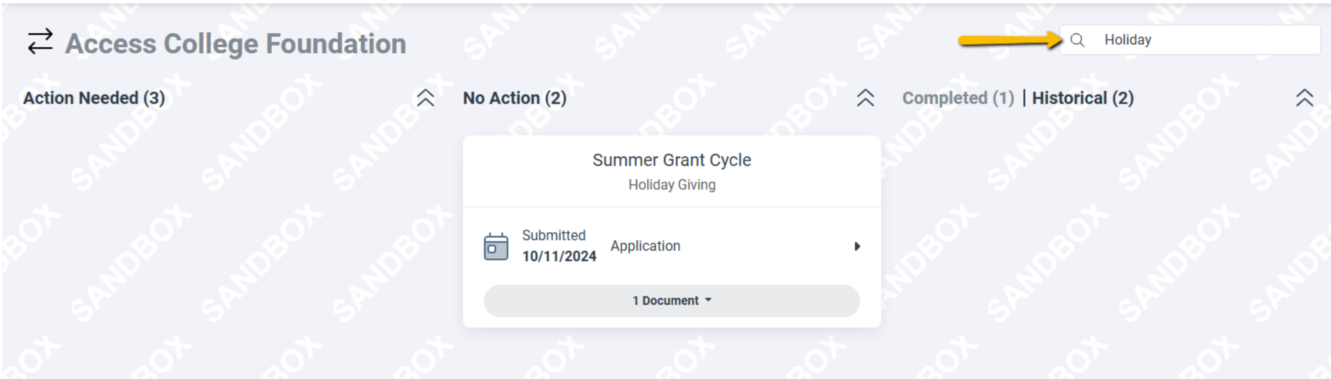
    - If you've been assigned multiple follow up forms, you must complete them sequentially by due date.
    - Follow ups that are past due will be marked as "Past Due".



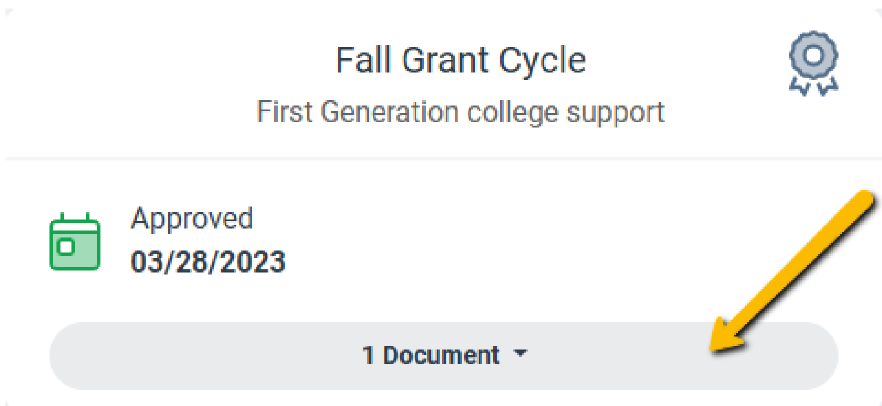
- The Project Name is listed under the request card header.



- The Quick Search can search for a project name within the dashboard.



- Click the document drop-down menu to view and access all forms and files associated with the request.

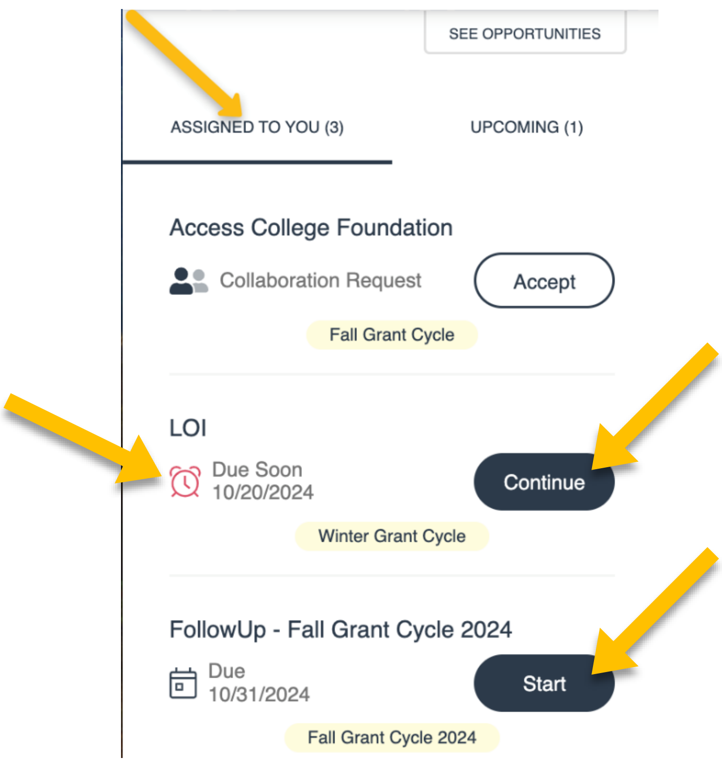


To Do Panel

The To Do panel of the applicant dashboard displays actions that can be taken on any active or collaboration requests assigned to the applicant. It contains two tabs: **Assigned To You** and **Upcoming.**

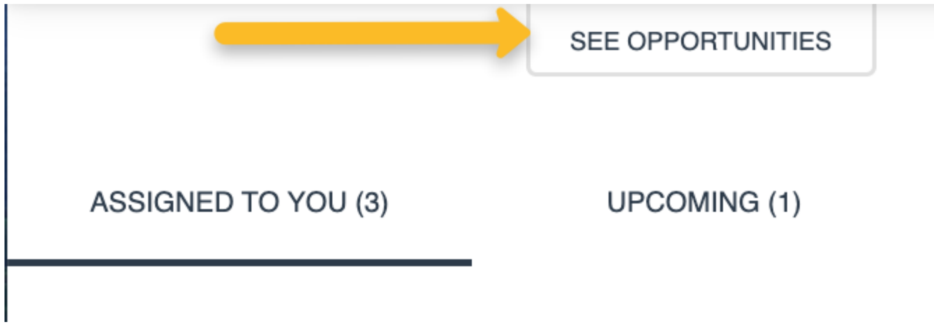
- The **Assigned To You** tab is open by default and displays collaboration requests and any forms assigned to you. Applicants can Accept, Continue, or Start any requests from this tab.
  - Forms will be ordered by the due date if applicable; a red alarm clock icon will appear next to forms that have a due date within the next two weeks.
- Click "Start" in the **To Do** panel to start working on a follow up form.
- Click "Continue" in the **To Do** panel to continue working on a form you have not yet submitted.

This includes follow up forms which might be assigned if your request is approved. [Applicant Tutorial - Submit a Follow Up Form] contains details.



- The Upcoming tab displays any sequential follow ups that are upcoming but cannot be submitted yet.

- Click the See Opportunities button to navigate to the Apply page where a new request can be started.

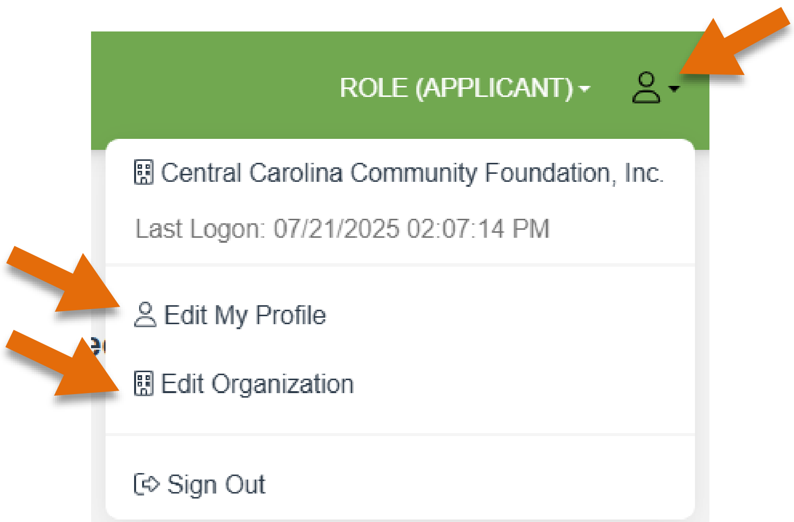


USER PROFILE

If you wish to edit your account information or change your password, click the menu icon in the upper-right corner of the page. This will expand a drop-down menu:

- Click Edit My Profile to update your contact information or password.
- Click Edit Organization to update your organization's contact information.
- Click Sign Out to log out of the site.

Be sure to click save in the bottom right once you've finished.



Please note, that 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").