

Applicant Dashboard



Contents

Accessing the Applicant Dashboard	3
Applicant Dashboard Page.....	4
Personal Information	5
Manage Organisations	6
Manage Users	7
• Adding a User.....	7
Current Application	8
Current Grants	9
Accountability Reports.....	10
Application History	11
Create Application.....	12

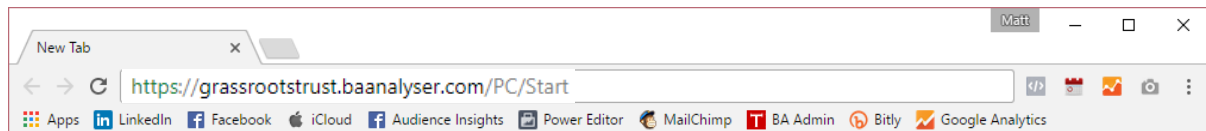
Starting an Application – Step by Step

Accessing the Applicant Dashboard

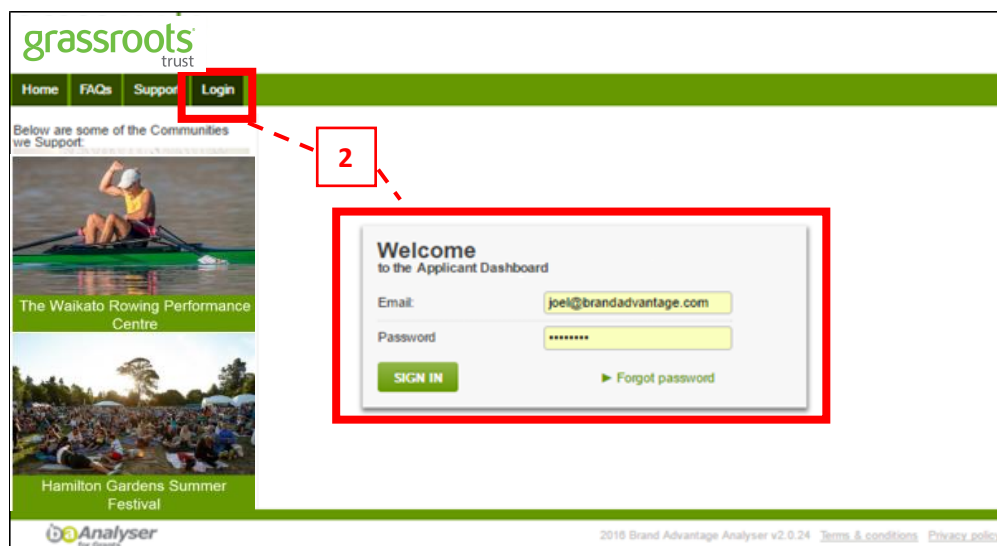
1. To access the Applicant Dashboard, enter the Grant homepage first.

➤ To open the site, enter <https://grassrootstrust.baanalyser.com/PC/Start> in the address bar (top of page) of your web browser. We will be using 'Chrome' for this guide. (You can click on the link as well to enter)

Site example:



2. Click **Login** located in the toolbar or click on the **login** button in the middle of the page and enter in your **Email** and **Password**.



Important Note:

If this is your first time logging in, you will see the prompt below to ask you to assign a password. After you have confirmed your password, you can then use the new password assigned to login and view your application details.

Assign a password and click **Save** for first time users.

Starting an Application – Step by Step

Applicant Dashboard Page

Once you have signed in, this is what your Applicant Dashboard looks like.

On the left side of the menu where you can click in, you can manage and edit your:

1. **Personal Information** – View Applicant/user details.
2. **Manage Organisations** – View Organisation details.
3. **Manage Users** – View system users.
4. **Current Application** – View details of current application.
5. **Current Grants** – View a list of approved grants.
6. **Accountability Reports** – View a list of accountability reports that must be completed for all approved funding requests.
7. **Application History** – View the history of previous applications.
8. **Creating a new Application**

Personal Information	1
Manage Organisations	2
Manage Users	3
Current Application	4
Current Grants	5
Accountability Reports	6
Application History	7
Create Application	8

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Logout

Home FAQs Support

Personal Information
Manage Organisations
Manage Users
Current Application
Current Grants
Accountability Reports
Application History
Create Application

Home Page

Welcome to your Applicant Dashboard. From here you can manage organisation and personal information for the purpose of future applications

View the progress of applications you have submitted.

View information concerning Grants which you have been approved for.

Access the accountability reports forms to fill in the required information following the close of your funded endeavours.

View previous applications which you have submitted.

Go straight to make an new applications using information populated from your dashboard.

If you have any questions regarding the Applicant Dashboard or application process please see our FAQs page or contact our support team.

Starting an Application – Step by Step

Personal Information

This is where you can view and edit your personal profile and reset your password

1. Click “**Personal Information**” to access.
2. To edit the fields, click in the boxes and type your changes.
3. Once you have finished editing, click “**SAVE CHANGES**” to save your changes.

The screenshot shows the 'grassroots trust' website interface. At the top right, the user's email 'joel@brandadvantage.com' and a 'Logout' link are visible. A green navigation bar contains 'Home', 'FAQs', and 'Support'. On the left, a sidebar menu lists various options, with 'Personal Information' highlighted and marked with a red box and the number '1'. The main content area is titled 'Personal Information' and contains several form fields: 'First Name' (Joe), 'Last Name' (Bloggs), 'Email' (joel@brandadvantage.com), 'Position' (Admin), 'Role' (Applicant Admin), and 'Phone/DDI' (3070790). Below these is a 'Change Password' section with fields for 'Current Password', 'New Password', and 'Confirm New Password'. A red bracket groups the 'Role' dropdown and the 'Change Password' section, with a red box and the number '2' pointing to the 'Role' dropdown. A red dashed line points from the 'Role' dropdown to a text box on the right that explains the role options. At the bottom, a green 'SAVE CHANGES' button is highlighted with a red box and the number '3'.

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Home FAQs Support

1 Personal Information

Manage Organisations
Manage Users
Current Application
Current Grants
Accountability Reports
Application History
Create Application

Personal Information

First Name: Joe
Last Name: Bloggs
Email: joel@brandadvantage.com
Position: Admin
Role: Applicant Admin
Phone/DDI: 3070790

Change Password
Current Password
New Password
Confirm New Password

2

Click on the dropdown list to select the 'Role' type to assign.

You can either assign yourself as an "Applicant Admin" or an "Applicant User".

Admin role gives user administrative privileges.

3 SAVE CHANGES

Starting an Application – Step by Step

Manage Organisations

This is where you can view and edit Applicant Organisation details.

1. Click “**Manage Organisations**” to access.
2. To edit an existing Applicant Organisation, click “**Edit**” located on the right.

The screenshot shows the 'Manage Organisations' page. On the left, a sidebar menu has 'Manage Organisations' highlighted with a red box and a red '1' next to it. The main content area is titled 'Manage Organisations' and contains a table with columns: 'Organisation Name', 'Phone', and 'Other Details'. The table lists five organisations: '1st Test Soccer', 'Freddy's Footy Club', 'J's Sports Footy', 'Onehunga Sports Club', and 'Ron's Rugby'. Each row has an 'Edit' link at the end. The 'Edit' link for 'Freddy's Footy Club' is highlighted with a red box and a red '2' next to it. The top of the page shows the 'grassroots trust' logo, the user email 'joel@brandadventure.com', and a 'Logout' link. The top navigation bar includes 'Home', 'FAQs', and 'Support'.

Organisation Name	Phone	Other Details
1st Test Soccer		Edit
Freddy's Footy Club	4437658	Edit
J's Sports Footy	0212107614	Edit
Onehunga Sports Club	0212107614	Edit
Ron's Rugby	0212107614	Edit

1. To edit the fields, click in the boxes and type your changes.
 2. Once you have finished editing, click “**SAVE CHANGES**” to save your changes.
 3. You can also add an additional Organisation you are part of by clicking “**Add additional organisation**”.
- ↳ The fields you can edit are exactly the same as you see below; click “**SAVE CHANGES**” when you have finished adding the new Organisation details.

The screenshot shows the 'Organisation Information' form. The form has two main sections: 'Organisation Information' and 'Street address'. The 'Organisation Information' section includes fields for 'Organisation Name', 'Phone', and 'Other Details'. The 'Street address' section includes fields for 'Street Line 1', 'Street Line 2', 'Suburb', 'City/Town', 'Region/Prov./State', 'Postcode', and 'Country'. The 'Organisation Name' field is pre-filled with 'Freddy's Footy Club'. The 'Phone' field is pre-filled with '4437658'. The 'Street Line 1' field is pre-filled with '99 Queen Street'. The 'Suburb' field is pre-filled with 'Auckland'. The 'City/Town' field is pre-filled with 'Auckland'. The 'Region/Prov./State' field is pre-filled with 'Auckland'. The 'Postcode' field is pre-filled with '1010'. The 'Country' field is pre-filled with 'New Zealand'. At the bottom of the form, there are two buttons: 'SAVE CHANGES' and 'Add additional organisation'. The 'SAVE CHANGES' button is highlighted with a red box and a red '2' next to it. The 'Add additional organisation' button is highlighted with a red box and a red '3' next to it. A red line with a red '1' next to it points to the 'Street Line 2' field. The top of the page shows the 'grassroots trust' logo, the user email 'joel@brandadventure.com', and a 'Logout' link. The top navigation bar includes 'Home', 'FAQs', and 'Support'.

Organisation Information

Organisation Name:

Phone:

Other Details:

Street address

Street Line 1:

Street Line 2:

Suburb:

City/Town:

Region/Prov./State:

Postcode:

Country:

[SAVE CHANGES](#) [Add additional organisation](#)

Starting an Application – Step by Step

Manage Users

You can enter the email addresses of colleagues or other contacts whom you wish to have access to the selected Organisations information available on the dashboard here.
An email will then be sent asking the new user to create a login.

If another member of your Organisation is going to complete the Accountability Report(s) on your behalf, please create them as a User now.

1. Click **“Manage Users”** to access.
2. To edit an existing user, click **“Edit”** on the right.
↳ Click **“SAVE CHANGES”** after you have completed your changes.
3. To add a new user, click **“ADD USER”**.

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Home FAQs Support

Personal Information
Manage Organisations
Manage Users
Current Application
Current Grants
Accountability Reports
Application History
Create Application

First Name	Last Name	Email	Position	Phone/DDI	Organisation	
Joe	Bloggs	joel@brandadvantage.com	Admin	3070790	1st Test Soccer	Edit
Jane	Smith	janes@email.com	Director of Sport	093077090	Netball Inc	Edit
Max	Payne	max.payne@warners.co.n	Mr	0215555555	Warners Studios	Edit

ADD USER

Adding a User

1. For adding a new user fill in the fields provided.
2. Click **“SAVE CHANGES”** once you have filled in the necessary fields.

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Home FAQs Support

Personal Information
Manage Organisations
Manage Users
Current Application
Current Grants
Accountability Reports
Application History
Create Application

Add User

First Name: Jack

Last Name: Trades

Email: jackt@hammer.co.nz

Position: Technician

Role: Applicant User

Phone/DDI: 0212107614

Organisation: J's Sports Footy

SAVE CHANGES

Click on the dropdown list to select the 'Role' type to assign to the new user. (User or Admin)

Click on the dropdown list to select the organisation the user belongs to.

Starting an Application – Step by Step

Current Application

You will be able to see all the applications currently in progress or has been submitted but requires further action, for the selected Organisation here.

1. Provides you with the details of the application which includes:

- Application number
- Organisation name
- Grant organisation name
- Grant category the application is for
- Amount requested by the Applicant Organisation
- Who the application is submitted by
- When the application was submitted

2. What stage an application is at represented by the progress circle which includes:

- Application being submitted
- Application being assessed
- Final decision of the Application made by the Board
- Eligibility of the Application
- Application being voted on

The screenshot shows the 'Current Application' page of the Grassroots Trust. The sidebar on the left includes links for Home, FAQs, Support, Personal Information, Manage Organisations, Manage Users, Current Application (highlighted), Current Grants, Accountability Reports, Application History, and Create Application. The main content area displays the details of a specific application (App No. 40) and a progress circle. The application details include: Application No: 40, Organisation Name: Youth Aide, Grant Name: Grassroots Trust Grant, Grant Category: Community, Amount Requested: \$4,500.00, Submitted By: Harrison Pyne, and Submitted On: 09/09/2016. The progress circle shows five stages: Submitted, Eligibility, Assessment, Vote, and Final Decision. The 'Final Decision' stage is highlighted in blue, indicating it is the current stage. Below the progress circle is a table of applications with columns for App No., Organisation, Grant Name, Grant Category, Applicant Name, Submitted, and a View link. The table lists four applications, with the first one (App No. 40) highlighted. Red annotations provide additional context: a box labeled '1' points to the application details form; a box labeled '2' points to the progress circle; a box explains that the color of the progress circle changes as the application moves through stages; a box points to the 'App No.' column in the table, stating that clicking on it allows viewing the progress of a particular application; and a box points to the 'View' link in the table, stating that clicking on it allows viewing the application form itself.

Current Application

Application No: 40

Organisation Name: Youth Aide

Grant Name: Grassroots Trust Grant

Grant Category: Community

Amount Requested: \$4,500.00

Submitted By: Harrison Pyne

Submitted On: 09/09/2016

Progress Circle:

- Submitted
- Eligibility
- Assessment
- Vote
- Final Decision**

Expected date of Conclusion: 09/10/2016

App No.	Organisation	Grant Name	Grant Category	Applicant Name	Submitted	View
40	Youth Aide	Grassroots Trust Grant	Community	Harrison Pyne	09/09/2016	View
38	School of Music	Grassroots Trust Grant	Education	Sue Dean	09/09/2016	View
39	Hammer FC	Grassroots Trust Grant	Sports	Don Harvey	09/09/2016	View
22	AKL Resthome	Grassroots Trust Grant	Community	Harrison Harrison	09/09/2016	View

To view the progress of a particular application, click on the "App No."

To view the application form itself, click on "View" and you will be taken to the application page.

Starting an Application – Step by Step

Current Grants

You can see information about any grants that have been approved for the Organisation and if there are any conditions attached to them.

You can also make notes regarding these grants for all with access to the Applicant Dashboard.

1. Click “**Current Grants**” to access.
2. To view an approved grant application, click “**View**” located on the right.

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Home FAQs Support

Personal Information
Manage Organisations
Manage Users
Current Application
Current Grants
Accountability Reports
Application History
Create Application

Current Grants

App No	Organisation	Grant Name	Grant Category	Applicant Name	Requested Amount	Approved Amount	Date Granted	
GR11	EA Sports	Grassroots Trust Grant	Sports	Joe Bloggs	\$9,000.00	\$8,000.00	22/09/2016	View
GR13	Tester Footy Club	Grassroots Trust Grant	Community	Jamie Lind	\$9,000.00	\$3,000.00	31/08/2016	View
GR14	Hockey Inc	Grassroots Trust Grant	Sports	Arthur King	\$8,000.00	\$3,000.00	20/09/2016	View

1. To view the approved grant, you will need to click “**Download Application**”. A PDF document will be generated and downloaded to your computer.

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Home FAQs Support

Progress

100%

Thank you for registering your completed grants proposal with the Grassroots Trust.

We acknowledge your completed request for support and we will respond to you through the email address that you have provided as part of your contact details contained within your grants proposal.

We will endeavour to provide a response within the next 10 working days, but please understand that our response time may be longer if we receive a higher number of applications or if a public holiday falls within the 10 day period.

[Download Application](#)

You can open the PDF document to view, it will have the heading ‘Application for Funding’ on top.

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Application for Funding

Initial Step - Applicant Details

Name of applicant: Joe Lim

Applicant position: Applicant

Applicant email: joel@brandadvantage.com

Applicant phone number: 3070790

Starting an Application – Step by Step

Accountability Reports

When a grant has been received and used for its purposes the Applicant/Users can view the details of the grant and click through this link to go to the Accountability Report required of them to fill in.

1. Click “**Accountability Reports**” in the Applicant Dashboard to enter:
2. Click on the “**App No**” that relates to your application to complete Accountability Report.

The screenshot shows the Grassroots Trust Applicant Dashboard. The left sidebar contains a menu with 'Accountability Reports' highlighted. The main area displays a table of applications. The 'App No' column is highlighted.

App No	Organisation	Grant Name	Grant Category	Applicant Name	Money Requested	Date Granted	Report Due	Amount Approved
GT2	Tester Footy Club	Grassroots Trust Grant	Sports	Joe Lim	\$0.00	20/09/2016	30/11/2016	\$0.00

2. Here is the first page you will see for completing your Accountability Report. Please refer to “**Accountability Report Guide**” for instructions on how to complete an Accountability Report.

The screenshot shows the 'Grant Accountability Report' page. The 'Grant Details Information' section is highlighted with a red box and labeled '1'. The 'Purpose/Reason for grant' field is highlighted with a red box and labeled '2'.

Grant Accountability Report:

The following is the Accountability Report that you must complete and submit to Grassroots Trust by the Report due date as stated in the 'Accountability Report' email you received or as stated in the Accountability Report page in your Applicant Dashboard.

The accountability report is the confirmation that the Grant money has been spent in accordance with the approved purposes. The supporting documentation must be provided to allow the Trust to confirm the Grant money has been spent correctly.

Please see the below information for confirmation of the details of the Grant that has been provided.

Then [click](#) Start at the bottom of the page to commence with completing your Accountability Report.

Once completed, please note, that you may “**modify**” or “**download**” the report as a PDF; then please click the “**Submit Report**” button that will appear at the bottom of the page. The Grant details information appears below as a [confirmation only](#).

Grant Details Information

Accountability Report

Application id: GT2

Organisation name: Tester Footy Club

Amount granted: \$3,000.00

Grant type: Grassroots Trust Grant

Grant category: Community

Date Granted: 31 Aug 2016

Purpose/Reason for grant: This is an application to provide funding for a Rugby Gala

Start ►

Application History

Here the Applicants will be able to view all applications that has been submitted, assessed and finalised ('closed off' with no further actions required).

1. You will see:

- Application number
- Name of Applicant Organisation
- Grant name
- Grant category
- Requested amount from the Application
- Who has submitted the Application
- When the Application has been submitted
- Status of Application (Approved, Declined, etc.)

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Home FAQs Support

Personal Information
Manage Organisations
Manage Users
Current Application
Current Grants
Accountability Reports
Application History
Create Application For >

Application History

Application No: GT80

Organisation Name: E Community

Grant Name: Grassroots Trust Grant

Grant Category: Community

Amount Requested: \$9,000.00

Submitted By: Joe Bloggs

Submitted On: 29/09/2016

Application Status: Declined

App No.	Organisation	Grant Name	Grant Category	Applicant Name	Submitted	Amount Approved
80	E Community	Grassroots Trust Grant	Community	Joe Bloggs	29/09/2016	\$0.00
38	Man-you Fo	Grassroots Trust Grant	Sports	Don Harvey	09/09/2016	\$2,800.00
22	Auckland Resthome	Grassroots Trust Grant	Community	Harrison Harrison	09/09/2016	\$12,580.00

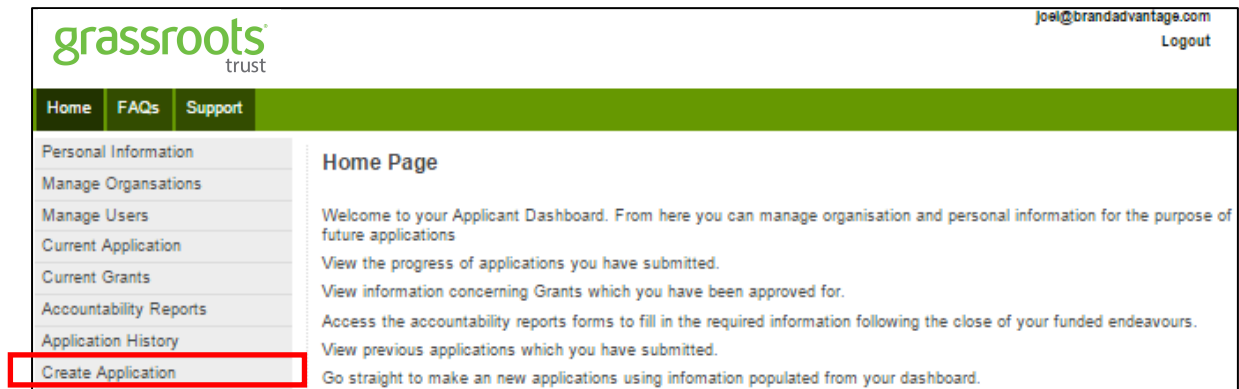
Starting an Application – Step by Step

Create Application

Here you can start a new application under your selected Organisation with the available data populated into the application form:

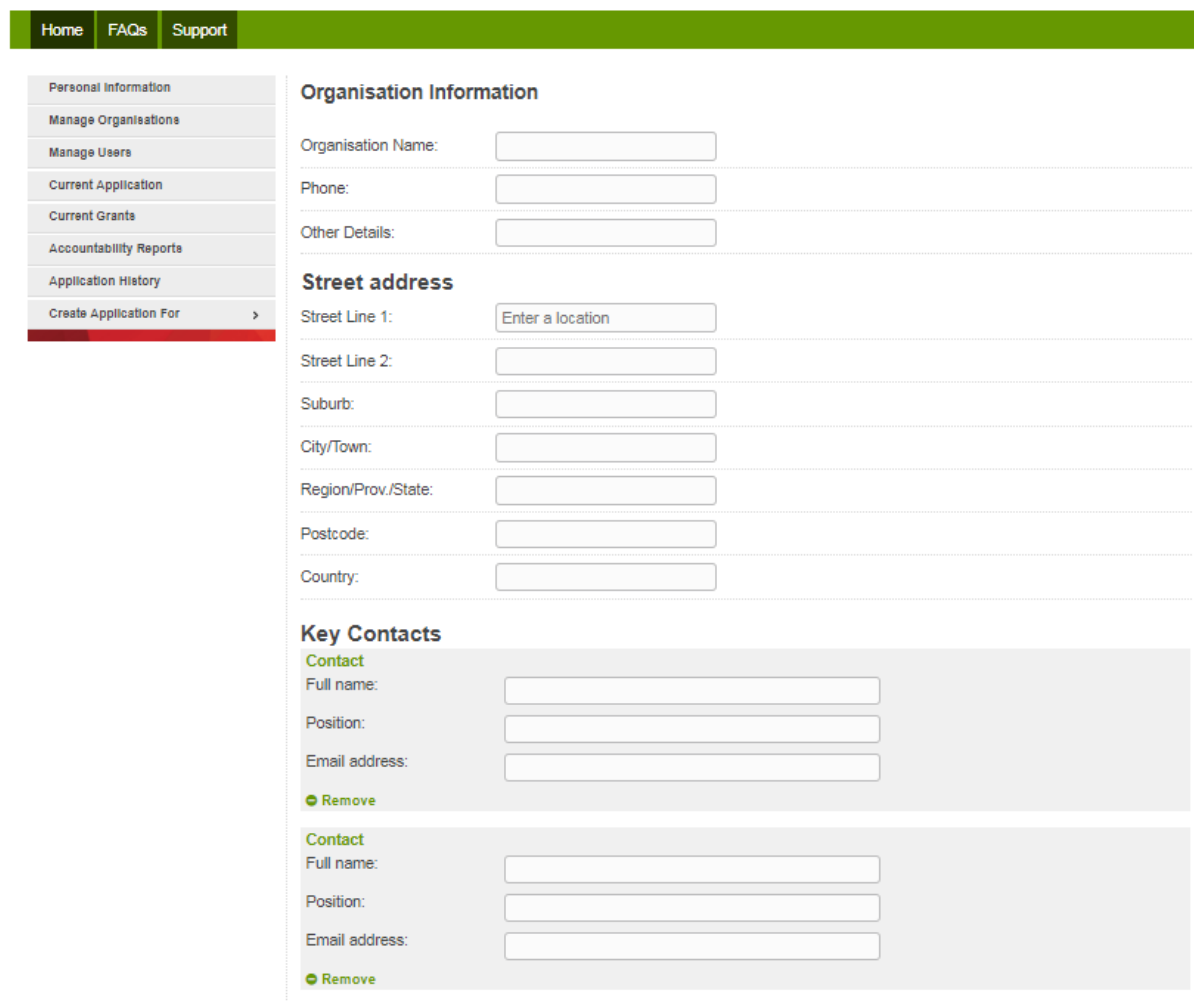
- Organisation info
- Personal info

➤ Click “**Create Application**”.



The screenshot shows the 'grassroots trust' logo at the top left and a 'Logout' link at the top right. A green navigation bar contains 'Home', 'FAQs', and 'Support'. A left sidebar lists menu items: 'Personal Information', 'Manage Organisations', 'Manage Users', 'Current Application', 'Current Grants', 'Accountability Reports', 'Application History', and 'Create Application' (which is highlighted with a red box). The main content area is titled 'Home Page' and contains a welcome message and instructions on how to manage applications, grants, and reports.

➤ You will be taken to the ‘Register Now’ page.



The screenshot shows the 'Organisation Information' form. It has a green navigation bar at the top with 'Home', 'FAQs', and 'Support'. A left sidebar lists menu items: 'Personal Information', 'Manage Organisations', 'Manage Users', 'Current Application', 'Current Grants', 'Accountability Reports', 'Application History', and 'Create Application For' (with a right arrow). The main content area is titled 'Organisation Information' and contains several sections: 'Organisation Name', 'Phone', 'Other Details', 'Street address' (with sub-sections for 'Street Line 1', 'Street Line 2', 'Suburb', 'City/Town', 'Region/Prov./State', 'Postcode', and 'Country'), and 'Key Contacts'. The 'Key Contacts' section has two identical contact forms, each with fields for 'Full name', 'Position', and 'Email address', and a 'Remove' button.