



# Applicant Dashboard

## Applicant Dashboard Guide



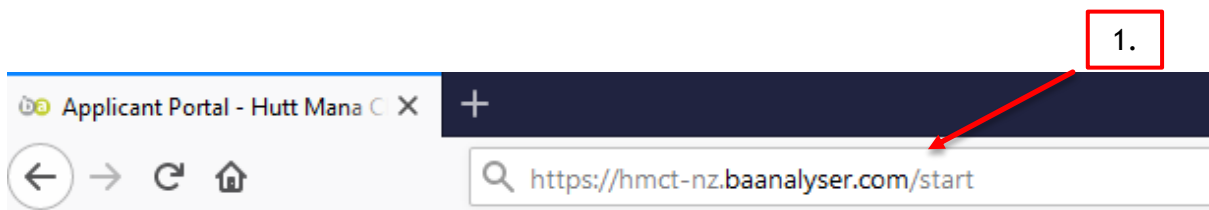
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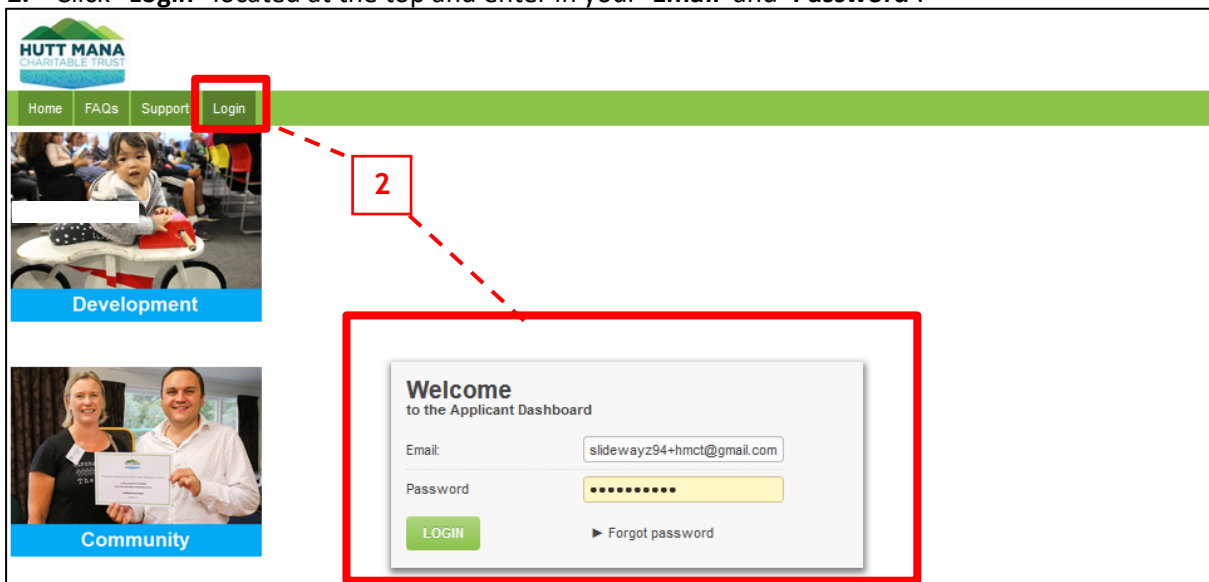
## Accessing the Applicant Dashboard

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

➤ To open the site, enter <https://hmct-nz.baanalyser.com/start> in the address bar located at the top of your web browser.

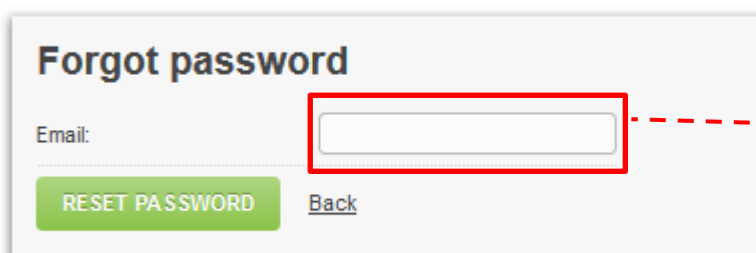


2. Click “Login” located at the top and enter in your ‘Email’ and ‘Password’.



### **Important Note:**

If this is your first-time logging in and you did not set up a password in the initial email, please click ‘Forgot Password’ and follow the instructions emailed to you.



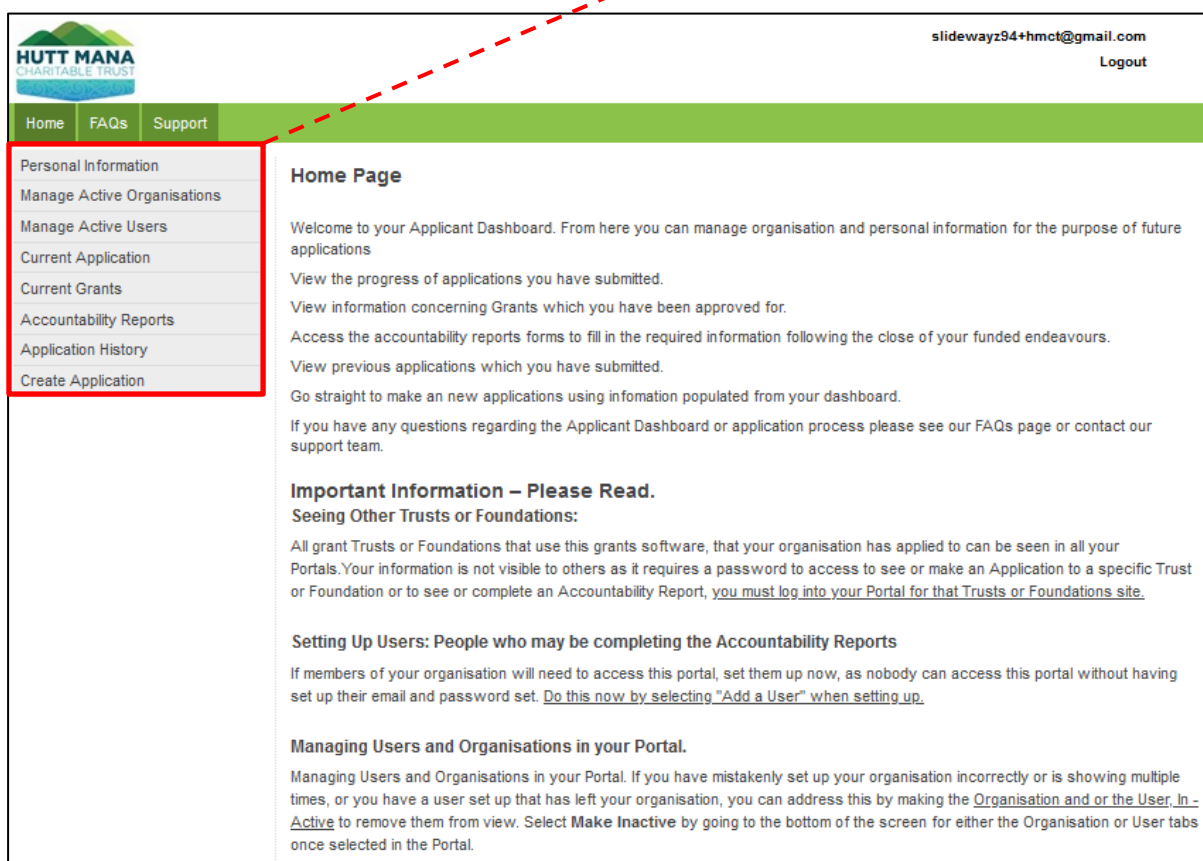
Enter your email and follow the instructions to reset your password.

## 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 applicant 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** – Required to complete if you receive an email notification indicating your application status as approved.
7. **Application History** – View the history of current application.
8. **Creating a new Application**

Personal Information	1
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The screenshot shows the Applicant Dashboard interface. At the top left is the HUTT MANA CHARITABLE TRUST logo. At the top right, the user's email 'slidewayz94+hmct@gmail.com' and a 'Logout' link are visible. Below the header is a navigation bar with 'Home', 'FAQs', and 'Support' tabs. On the left side, there is a vertical menu with the following items: 'Personal Information', 'Manage Active Organisations', 'Manage Active Users', 'Current Application', 'Current Grants', 'Accountability Reports', 'Application History', and 'Create Application'. The main content area is titled 'Home Page' and contains the following text:

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.

**Important Information – Please Read.**

**Seeing Other Trusts or Foundations:**

All grant Trusts or Foundations that use this grants software, that your organisation has applied to can be seen in all your Portals. Your information is not visible to others as it requires a password to access to see or make an Application to a specific Trust or Foundation or to see or complete an Accountability Report, you must log into your Portal for that Trusts or Foundations site.

**Setting Up Users: People who may be completing the Accountability Reports**

If members of your organisation will need to access this portal, set them up now, as nobody can access this portal without having set up their email and password set. Do this now by selecting "Add a User" when setting up.

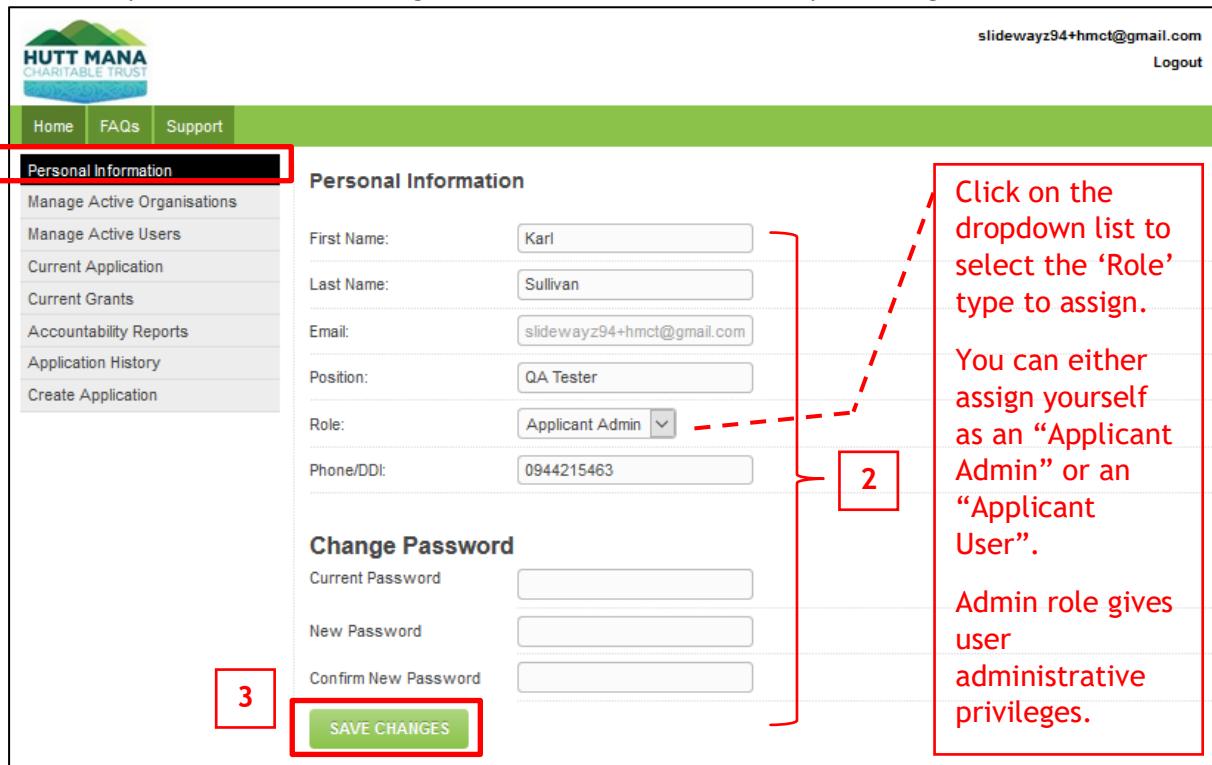
**Managing Users and Organisations in your Portal.**

Managing Users and Organisations in your Portal. If you have mistakenly set up your organisation incorrectly or is showing multiple times, or you have a user set up that has left your organisation, you can address this by making the Organisation and or the User In - Active to remove them from view. Select **Make Inactive** by going to the bottom of the screen for either the Organisation or User tabs once selected in the Portal.

## 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.



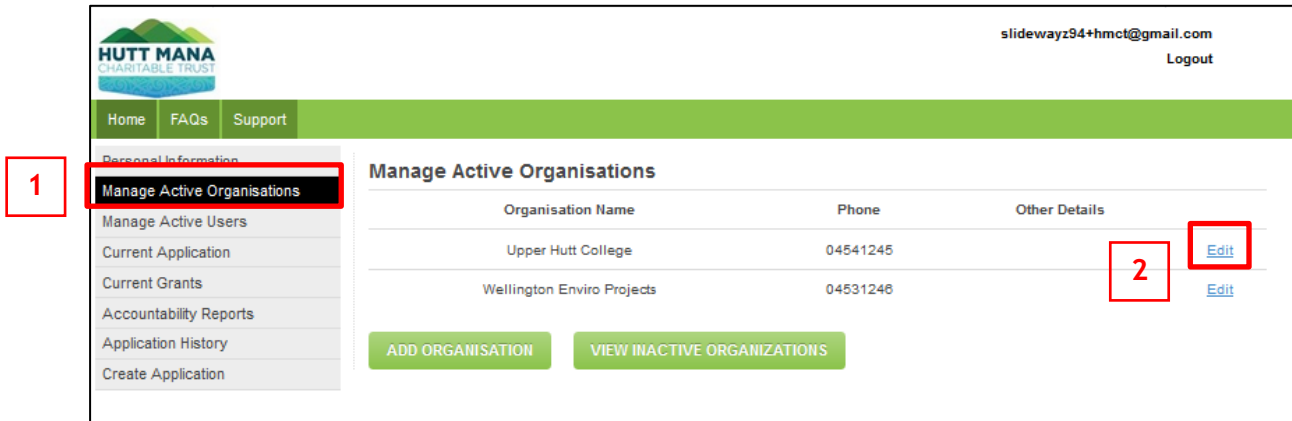
The screenshot shows the 'Personal Information' page of the applicant dashboard. The page has a green header with the 'HUTT MANA CHARITABLE TRUST' logo on the left and the user's email 'slidewayz94+hmct@gmail.com' and 'Logout' link on the right. Below the header is a navigation bar with 'Home', 'FAQs', and 'Support' links. A sidebar on the left contains a menu with 'Personal Information' highlighted, indicated by a red box and the number '1'. The main content area is titled 'Personal Information' and contains several form fields: 'First Name' (Karl), 'Last Name' (Sullivan), 'Email' (slidewayz94+hmct@gmail.com), 'Position' (QA Tester), 'Role' (Applicant Admin), and 'Phone/DDI' (0944215463). Below these fields is a 'Change Password' section with three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. A green 'SAVE CHANGES' button is located at the bottom of the form, indicated by a red box and the number '3'. A red dashed line and a red box with the number '2' point to the 'Role' dropdown menu. A red text box on the right explains that clicking on the dropdown list allows the user to select the 'Role' type to assign, and that the 'Admin' role gives the user administrative privileges.

# Accessing the Applicant Dashboard

## Manage Organisations

This is where you can view and edit applicant organisation details.

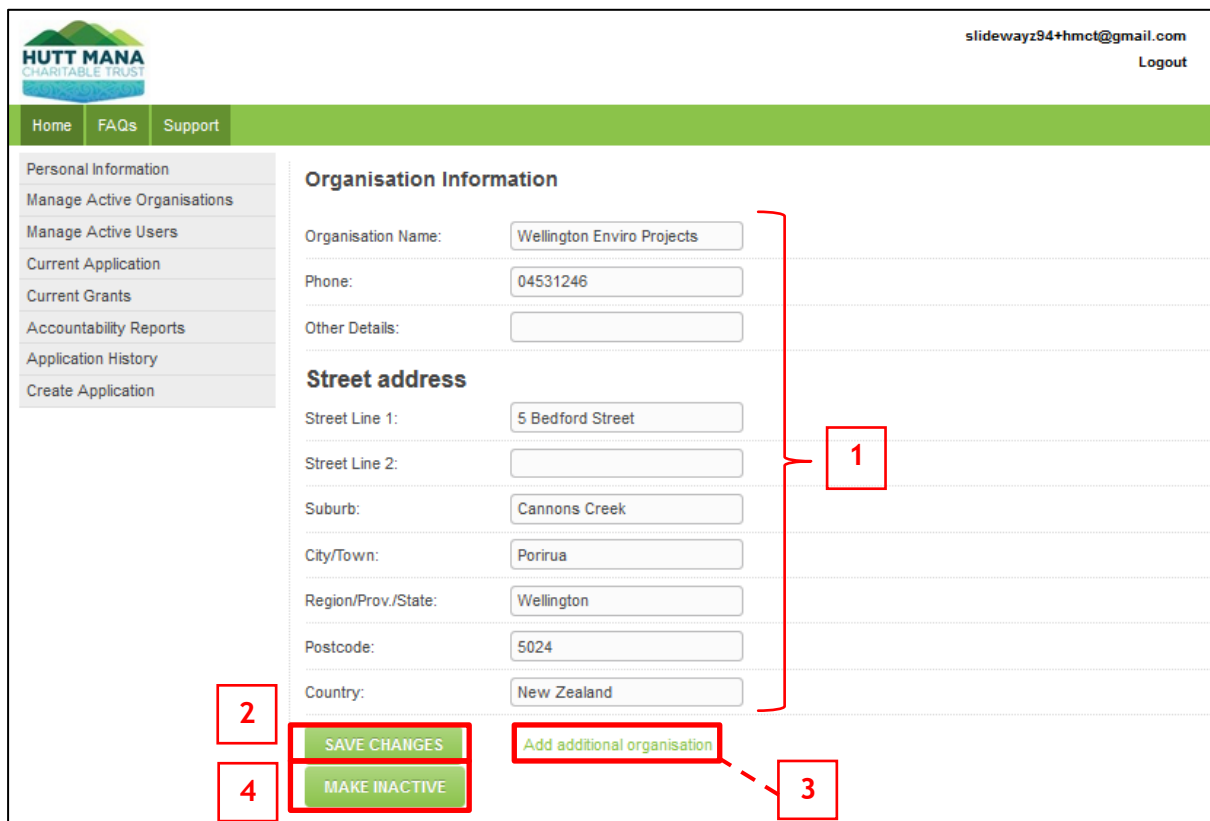
1. Click “**Manage Organisations**” to access.
2. To edit an existing applicant organisation, click “**Edit**” located on the right.



1

2

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.
4. Clicking “**MAKE INACTIVE**” will put the organisation into the “**Inactive Organisations**” list



1

2

3

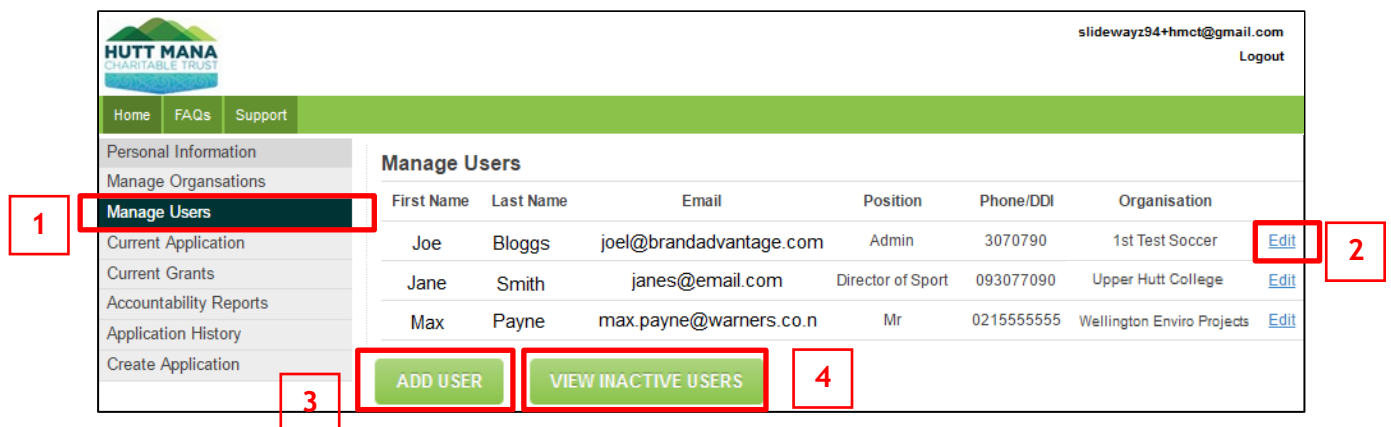
4

# Accessing the Applicant Dashboard

## 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.

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, you can also make the user Inactive.
3. To add a new user, click “**ADD USER**”.
4. Clicking “**VIEW INACTIVE USERS**” will display the list of inactive users.

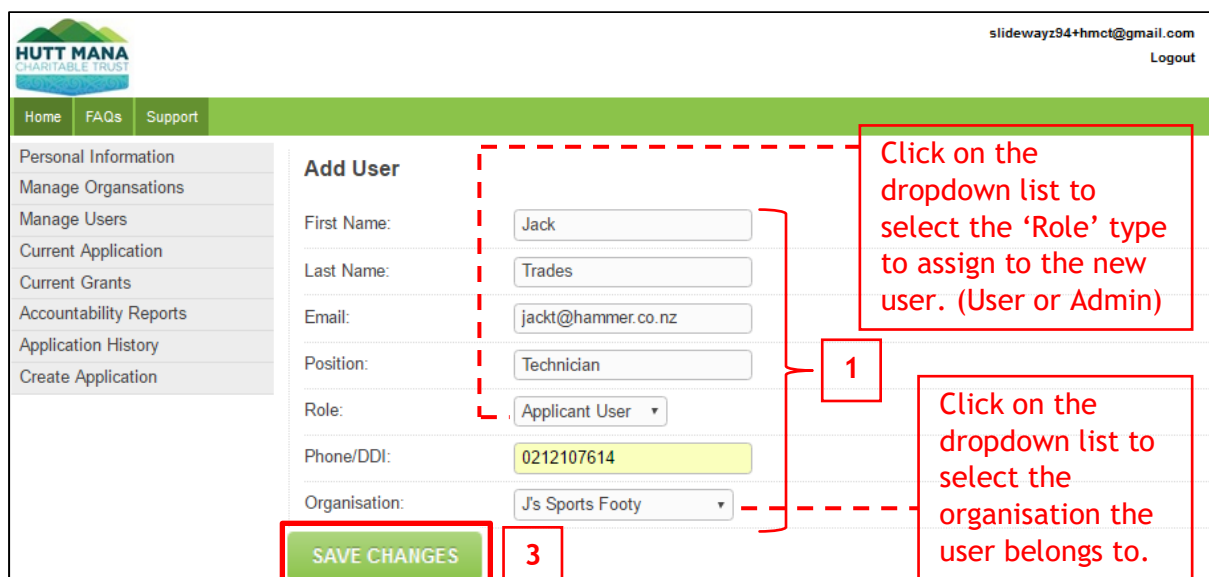


The screenshot shows the 'Manage Users' page. A sidebar on the left contains a menu with 'Manage Users' highlighted (callout 1). The main content area has a table of users with 'Edit' links (callout 2). At the bottom, there are 'ADD USER' (callout 3) and 'VIEW INACTIVE USERS' (callout 4) buttons.

First Name	Last Name	Email	Position	Phone/DDI	Organisation	
Joe	Bloggs	joel@brandadvantage.com	Admin	3070790	1st Test Soccer	<a href="#">Edit</a>
Jane	Smith	janes@email.com	Director of Sport	093077090	Upper Hutt College	<a href="#">Edit</a>
Max	Payne	max.payne@warners.co.n	Mr	0215555555	Wellington Enviro Projects	<a href="#">Edit</a>

## 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.



The screenshot shows the 'Add User' form. Callout 1 points to the 'Role' dropdown menu. Callout 2 points to the 'Organisation' dropdown menu. Callout 3 points to the 'SAVE CHANGES' button. Two text boxes provide instructions: 'Click on the dropdown list to select the 'Role' type to assign to the new user. (User or Admin)' and 'Click on the dropdown list to select the organisation the user belongs to.'

Form fields shown: First Name: Jack, Last Name: Trades, Email: jackt@hammer.co.nz, Position: Technician, Role: Applicant User, Phone/DDI: 0212107614, Organisation: Js Sports Footy.

# Accessing the Applicant Dashboard

## Current Application

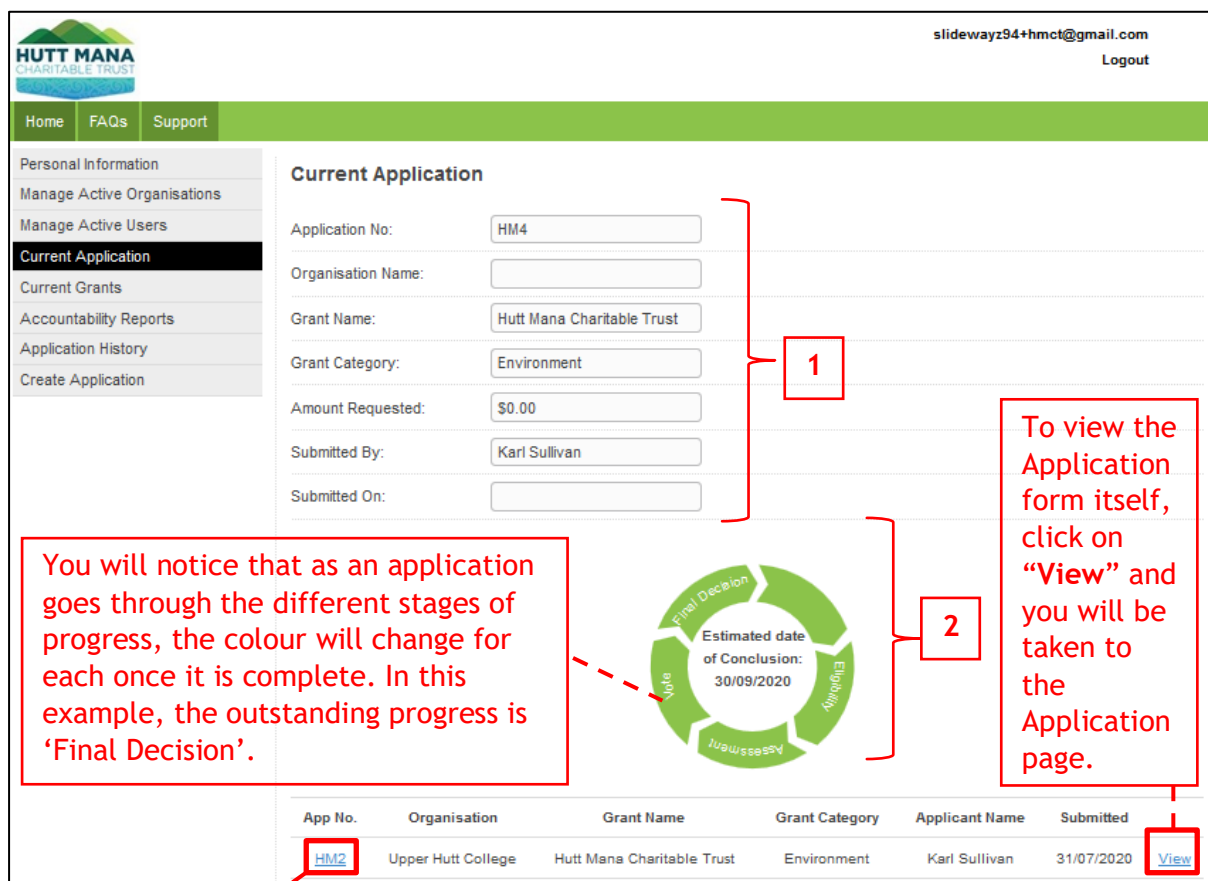
You will be able to see all the applications currently in progress or has been submitted but requires further action for the selected organisation here.

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

- Application number
- Organisation
- Organisation name
- Grant organisation name
- Grant category the application is for
- Amount requested by the Applicant
- 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. On the left is a navigation menu with 'Current Application' selected. The main content area displays application details in a form: Application No: HM4, Organisation Name: (empty), Grant Name: Hutt Mana Charitable Trust, Grant Category: Environment, Amount Requested: \$0.00, Submitted By: Karl Sullivan, Submitted On: (empty). A red bracket labeled '1' groups these details. Below the form is a circular progress indicator with five segments: 'Final Decision' (green), 'Eligibility' (green), 'Assessment' (green), 'Vote' (green), and 'Final Decision' (green). The center of the circle says 'Estimated date of Conclusion: 30/09/2020'. A red bracket labeled '2' groups the progress circle and a 'View' button in the table below. Below the progress circle is a table with columns: App No., Organisation, Grant Name, Grant Category, Applicant Name, Submitted, and a 'View' button. The first row shows App No. HM2, Organisation Upper Hutt College, Grant Name Hutt Mana Charitable Trust, Grant Category Environment, Applicant Name Karl Sullivan, Submitted 31/07/2020, and a 'View' button. A red box highlights the 'HM2' in the 'App No.' column and the 'View' button. A red dashed line connects the 'HM2' box to a separate text box at the bottom left. Another red dashed line connects the 'View' button to a text box on the right. A third red dashed line connects the 'View' button to a text box at the bottom right.

**1**

**2**

You will notice that as an application goes through the different stages of progress, the colour will change for each once it is complete. In this example, the outstanding progress is 'Final Decision'.

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

App No.	Organisation	Grant Name	Grant Category	Applicant Name	Submitted	
<a href="#">HM2</a>	Upper Hutt College	Hutt Mana Charitable Trust	Environment	Karl Sullivan	31/07/2020	<a href="#">View</a>

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

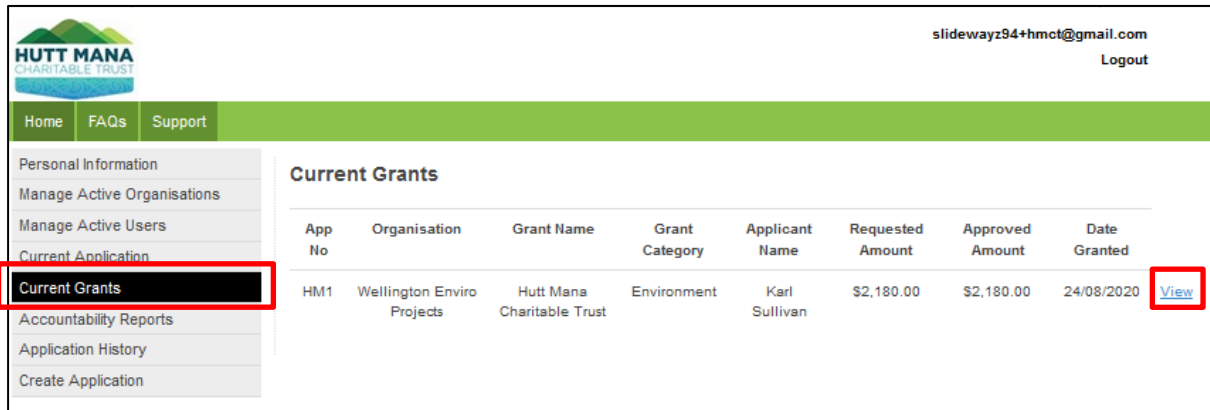


# Accessing the Applicant Dashboard

## Current Grants

You can see information about any grants that have been approved for the organisation and the conditions attached to them. You can also make notes regarding these grants for all with access to the applicant dashboard to see.

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

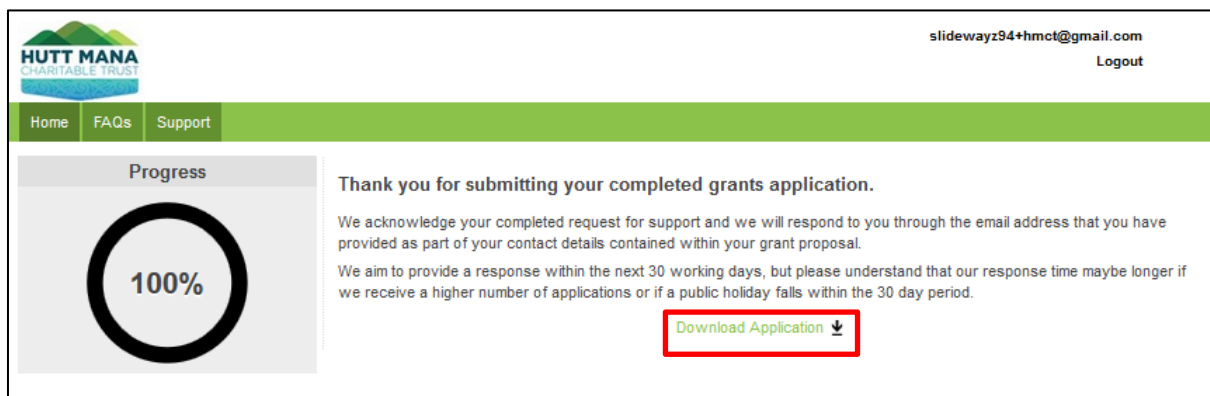


The screenshot shows the applicant dashboard for HUTT MANA CHARITABLE TRUST. The user is logged in as slidewayz94+hmct@gmail.com. The dashboard has a green navigation bar with 'Home', 'FAQs', and 'Support'. A sidebar on the left contains a menu with items like 'Personal Information', 'Manage Active Organisations', and 'Current Grants', which is highlighted with a red box labeled '1'. The main content area is titled 'Current Grants' and contains a table with the following data:

App No	Organisation	Grant Name	Grant Category	Applicant Name	Requested Amount	Approved Amount	Date Granted	
HM1	Wellington Enviro Projects	Hutt Mana Charitable Trust	Environment	Karl Sullivan	\$2,180.00	\$2,180.00	24/08/2020	<a href="#">View</a>

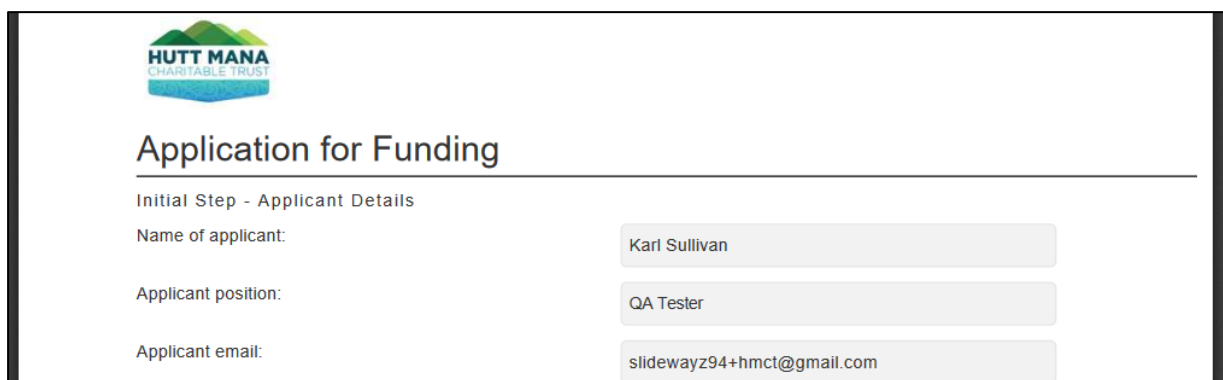
The 'View' button in the table is highlighted with a red box labeled '2'.

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



The screenshot shows the applicant dashboard with a 'Progress' section. A circular progress indicator shows 100% completion. To the right, there is a message: "Thank you for submitting your completed grants application. 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 grant proposal. We aim to provide a response within the next 30 working days, but please understand that our response time maybe longer if we receive a higher number of applications or if a public holiday falls within the 30 day period." Below the message is a green button labeled "Download Application" with a download icon, highlighted with a red box.

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



The screenshot shows the 'Application for Funding' PDF document. The heading is 'Application for Funding'. Below the heading, it says 'Initial Step - Applicant Details'. The document displays the following applicant information:

- Name of applicant: Karl Sullivan
- Applicant position: QA Tester
- Applicant email: slidewayz94+hmct@gmail.com

## 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.

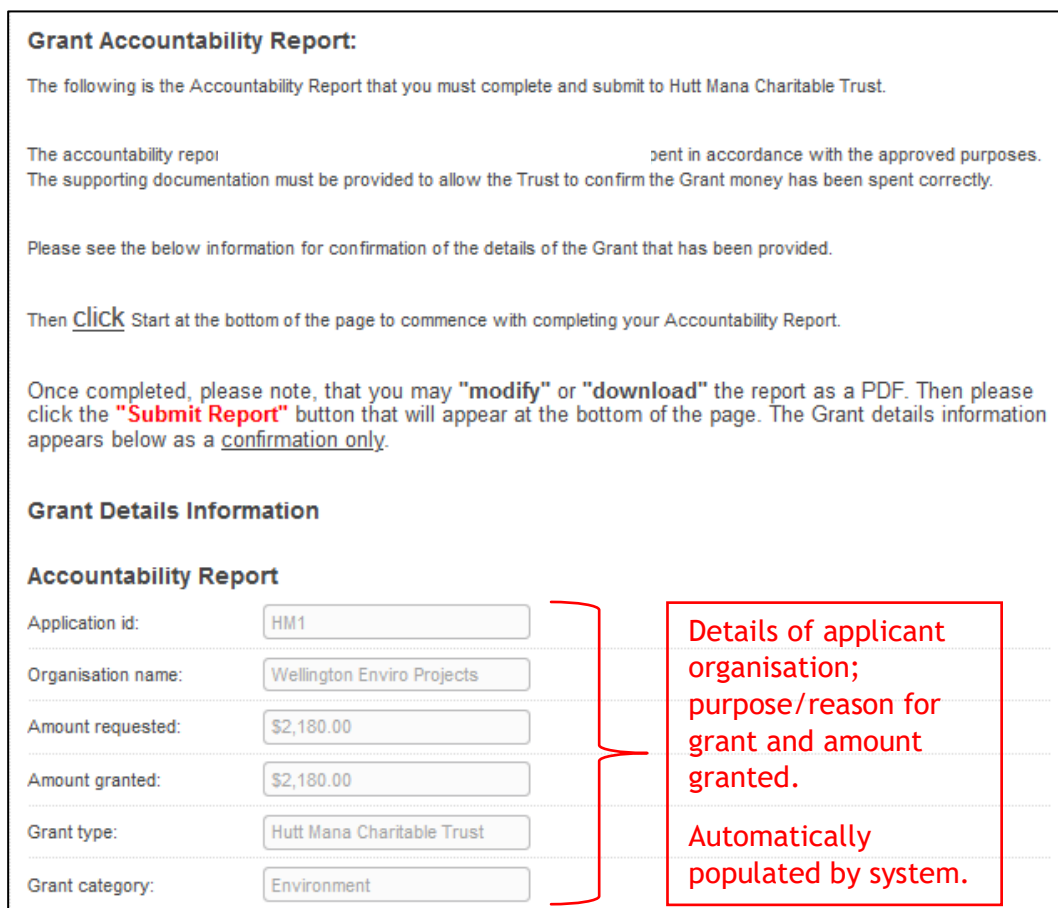
1. Click “**Accountability Reports**” in the Applicant Dashboard to enter:
2. Click on the “**App No**” that relates to your application to complete Accountability Report.



The screenshot shows the Applicant Dashboard interface. The top right corner displays the user's email 'slidewayz94+hmct@gmail.com' and a 'Logout' link. A green navigation bar contains 'Home', 'FAQs', and 'Support'. A left sidebar menu includes 'Personal Information', 'Manage Active Organisations', 'Manage Active Users', 'Current Application', 'Current Grants', 'Accountability Reports' (highlighted with a red box labeled '1'), 'Application History', and 'Create Application'. The main content area is titled 'Accountability Reports' and contains a table with the following data:

App No	Organisation	Grant Name	Grant Category	Applicant Name	Money Requested	Date Granted	Report Due	Amount Approved
HM1	Wellington Enviro Projects	Cossie Club Grant Charitable Trust	nvironment	Karl Sullivan	\$2,180.00	24/08/2020	20/06/2021	\$2,180.00

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



**Grant Accountability Report:**

The following is the Accountability Report that you must complete and submit to Hutt Mana Charitable Trust.

The accountability report must be submitted 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:	HM1
Organisation name:	Wellington Enviro Projects
Amount requested:	\$2,180.00
Amount granted:	\$2,180.00
Grant type:	Hutt Mana Charitable Trust
Grant category:	Environment

Details of applicant organisation; purpose/reason for grant and amount granted.

Automatically populated by system.

## 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  
Application

→Name of Applicant Organisation

→Grant name

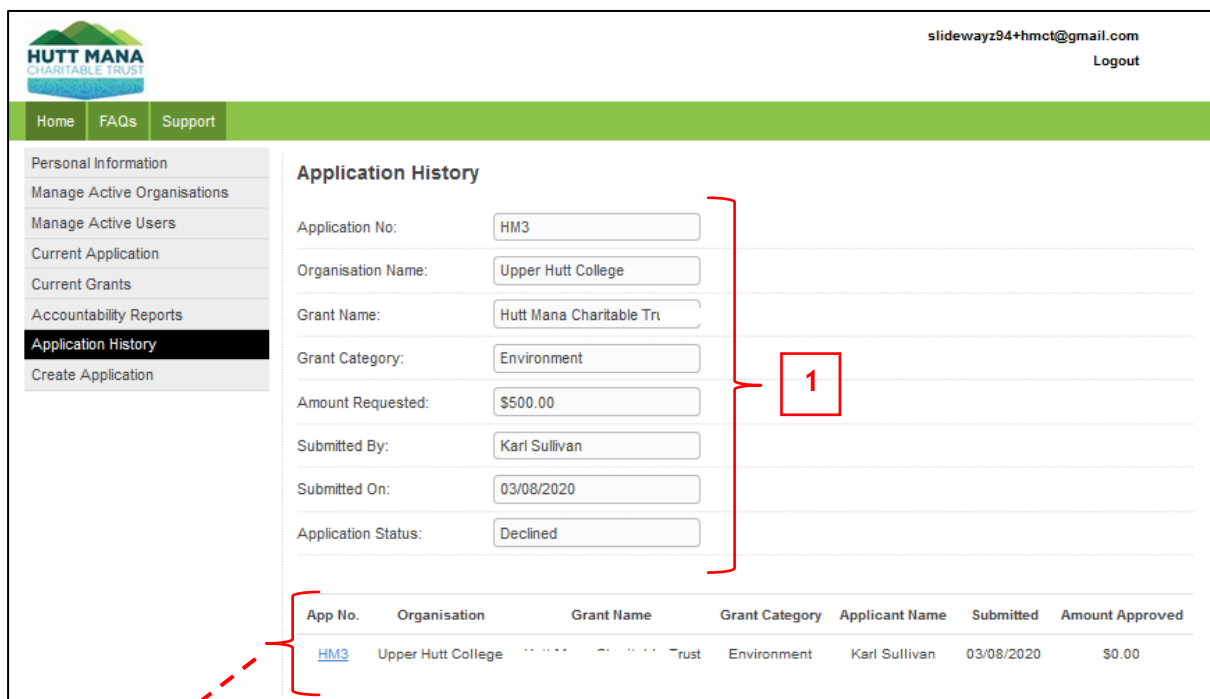
→Grant category  
etc.)

→Requested amount from the

→Who has submitted the Application

→When the Application has been submitted

→Status of Application (Approved, Declined,  
etc.)



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

Application History

Application No: HM3  
Organisation Name: Upper Hutt College  
Grant Name: Hutt Mana Charitable Tr  
Grant Category: Environment  
Amount Requested: \$500.00  
Submitted By: Karl Sullivan  
Submitted On: 03/08/2020  
Application Status: Declined

App No.	Organisation	Grant Name	Grant Category	Applicant Name	Submitted	Amount Approved
<a href="#">HM3</a>	Upper Hutt College	Trust	Environment	Karl Sullivan	03/08/2020	\$0.00

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

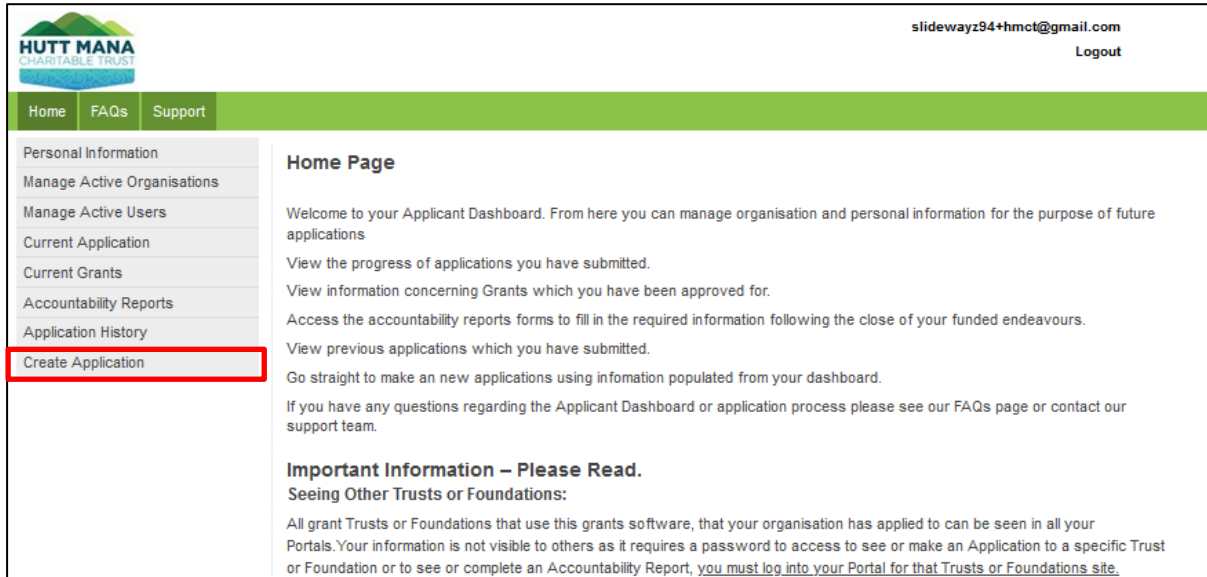
# Accessing the Applicant Dashboard

## Create Application

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

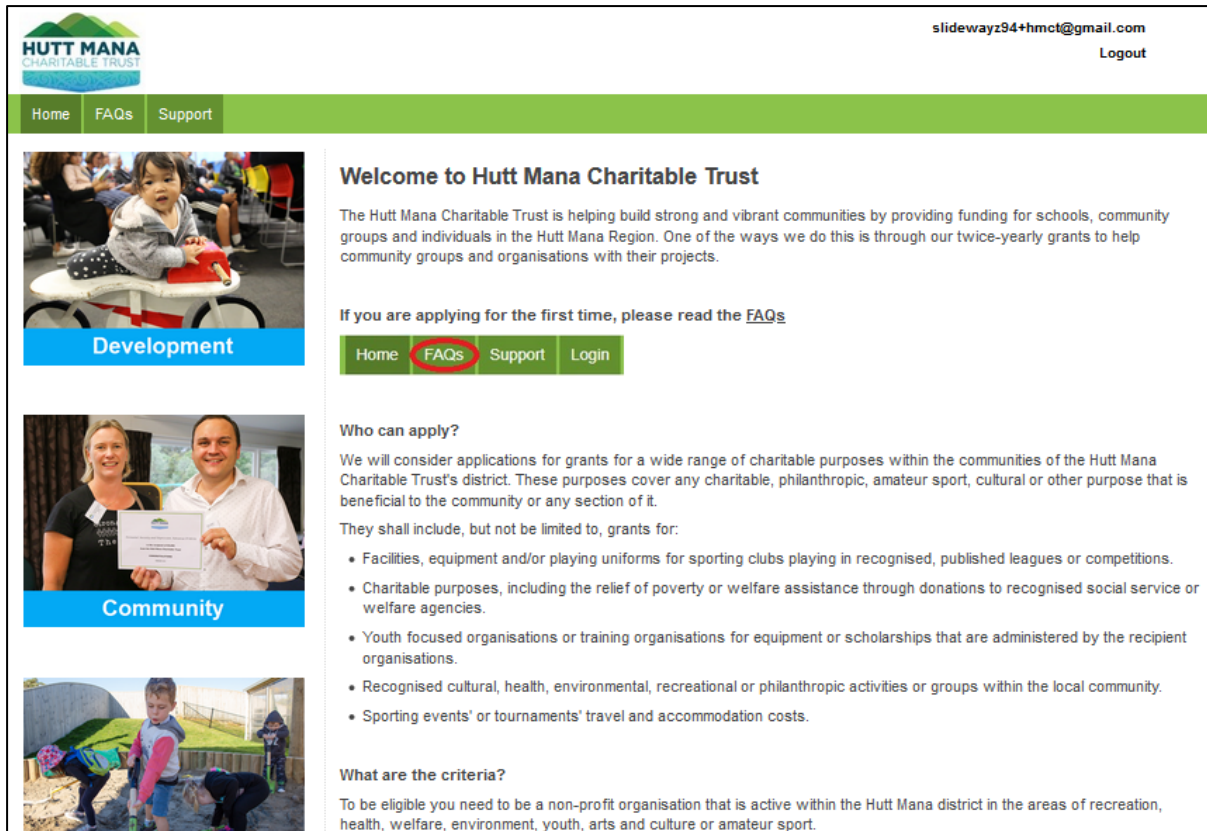
- Organisation info
- Personal info

➤ Click **“Create Application”**.



The screenshot shows the Applicant Dashboard interface. At the top right, the user's email 'slidewayz94+hmct@gmail.com' and a 'Logout' link are visible. A navigation bar contains 'Home', 'FAQs', and 'Support'. On the left, a sidebar menu lists various options, with 'Create Application' highlighted by a red box. The main content area is titled 'Home Page' and contains a welcome message, instructions on how to manage applications, and a section for 'Important Information – Please Read' regarding other trusts and foundations.

➤ You will be taken to the ‘Let’s get started’ page.



The screenshot shows the 'Let's get started' page. It features a header with the Hutt Mana Charitable Trust logo and navigation links for 'Home', 'FAQs', and 'Support'. Below the header, there are three main sections: 'Development' (with an image of a child on a tricycle), 'Community' (with an image of two people holding a certificate), and a central text area. The central text area includes a 'Welcome to Hutt Mana Charitable Trust' message, a link to 'FAQs' (circled in red), and a list of eligible purposes for grants. At the bottom, there is a section for 'What are the criteria?' with a list of requirements for eligibility.

*End of Guide*