Applicant Dashboard

Applicant Dashboard Guide

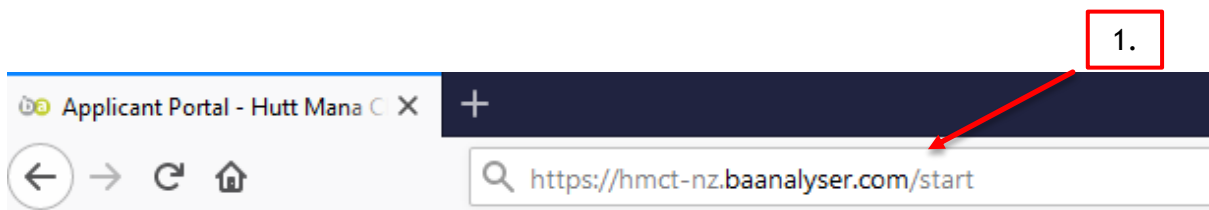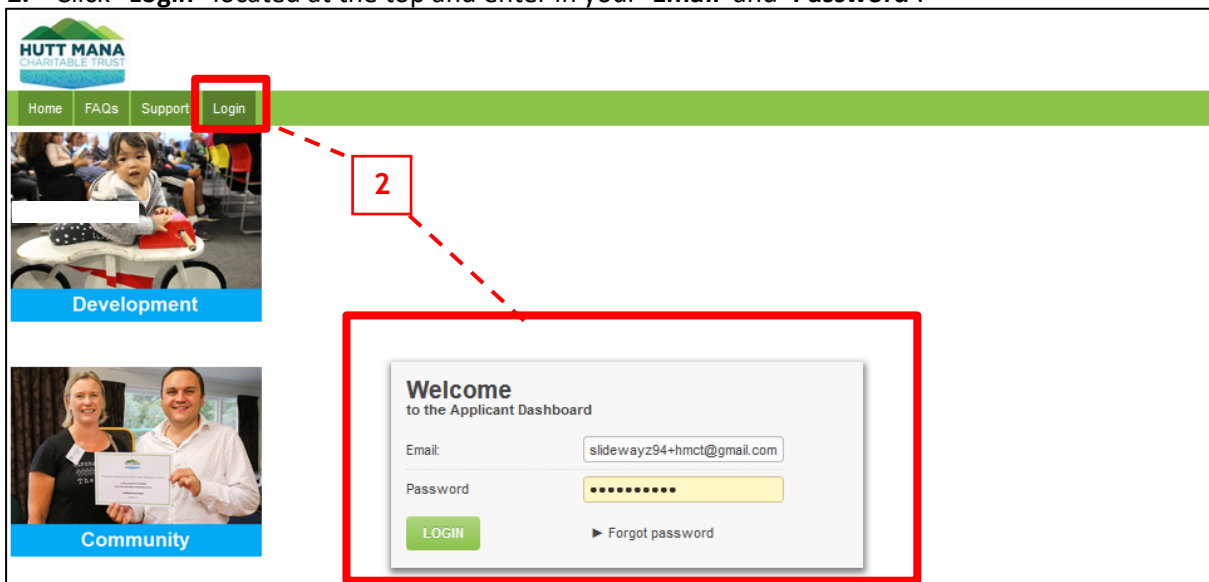# Table of Contents

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.
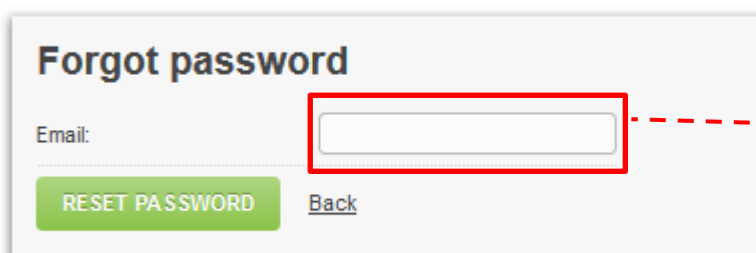

2. Click "**Login**" located at the top and enter in your '**Email**' and '**Password**'.

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.
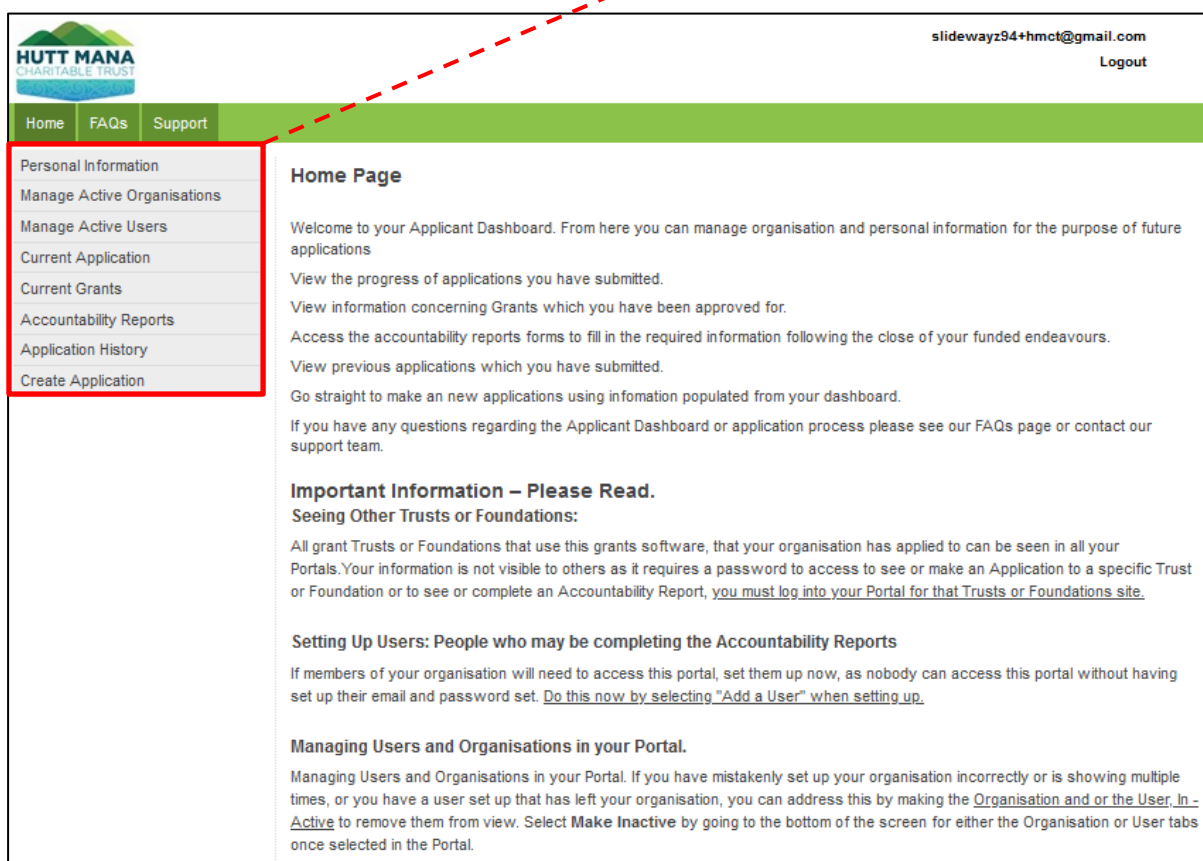

Enter your email and follow the instructions to reset your

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**

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slidewayz94+hmct@gmail.com
Logout

Home   FAQs   Support

Personal Information
Manage Active Organisations
Manage Active 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 infomation 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.
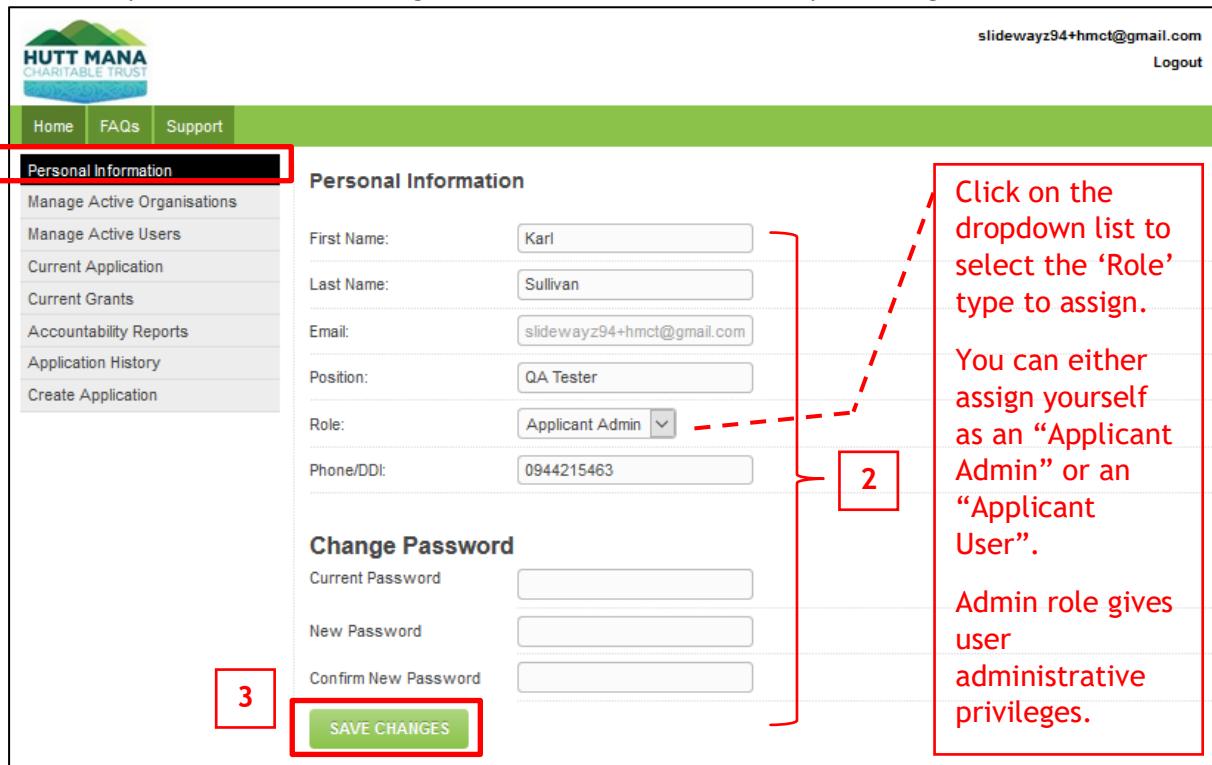
Managing Users and Organisations in your Portal.

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.
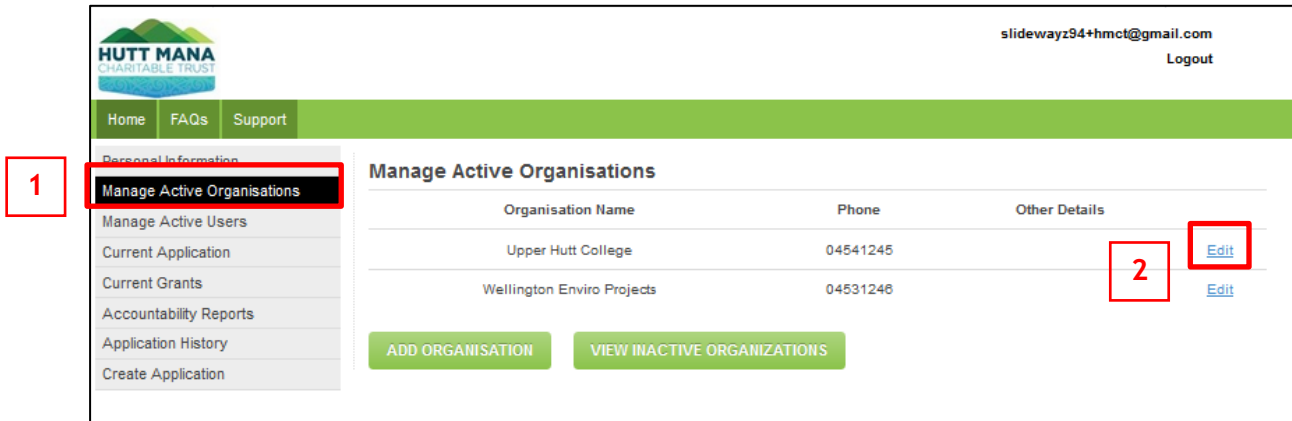3. Once you have finished editing, click "**SAVE CHANGES**" to save your changes.

Manage Organisations

This is where you can view and edit applicant organisation details.
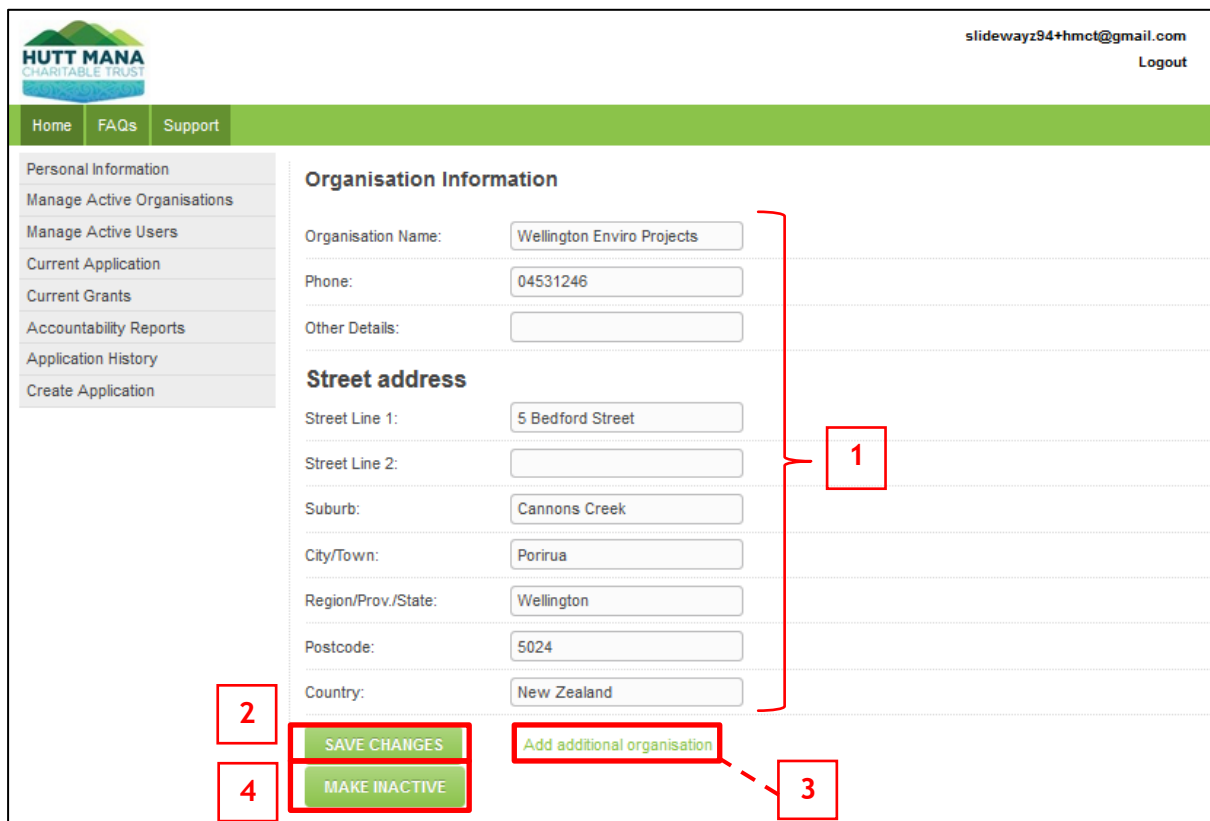
1. Click "**Manage Organisations**" to access.
2. To edit an existing applicant organisation, click "**Edit**" located on the right.

1. 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
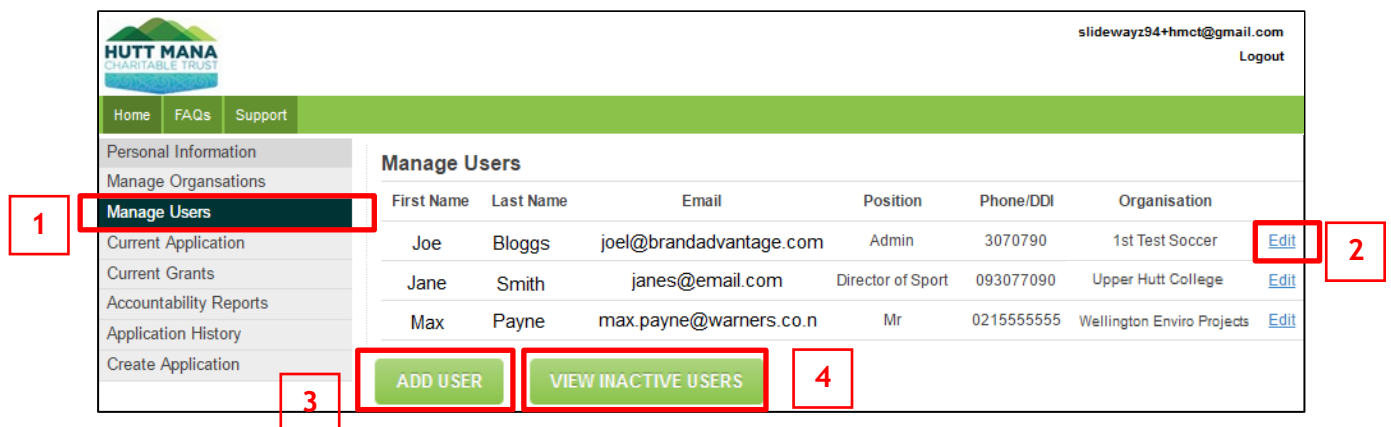
Manage Users

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.
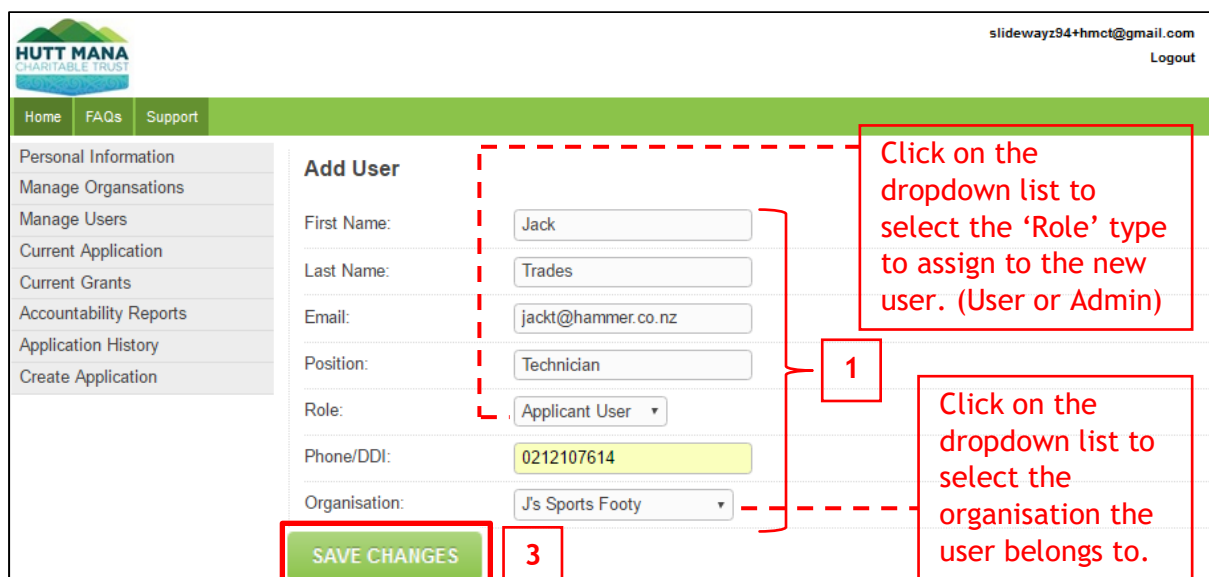
Adding a User

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

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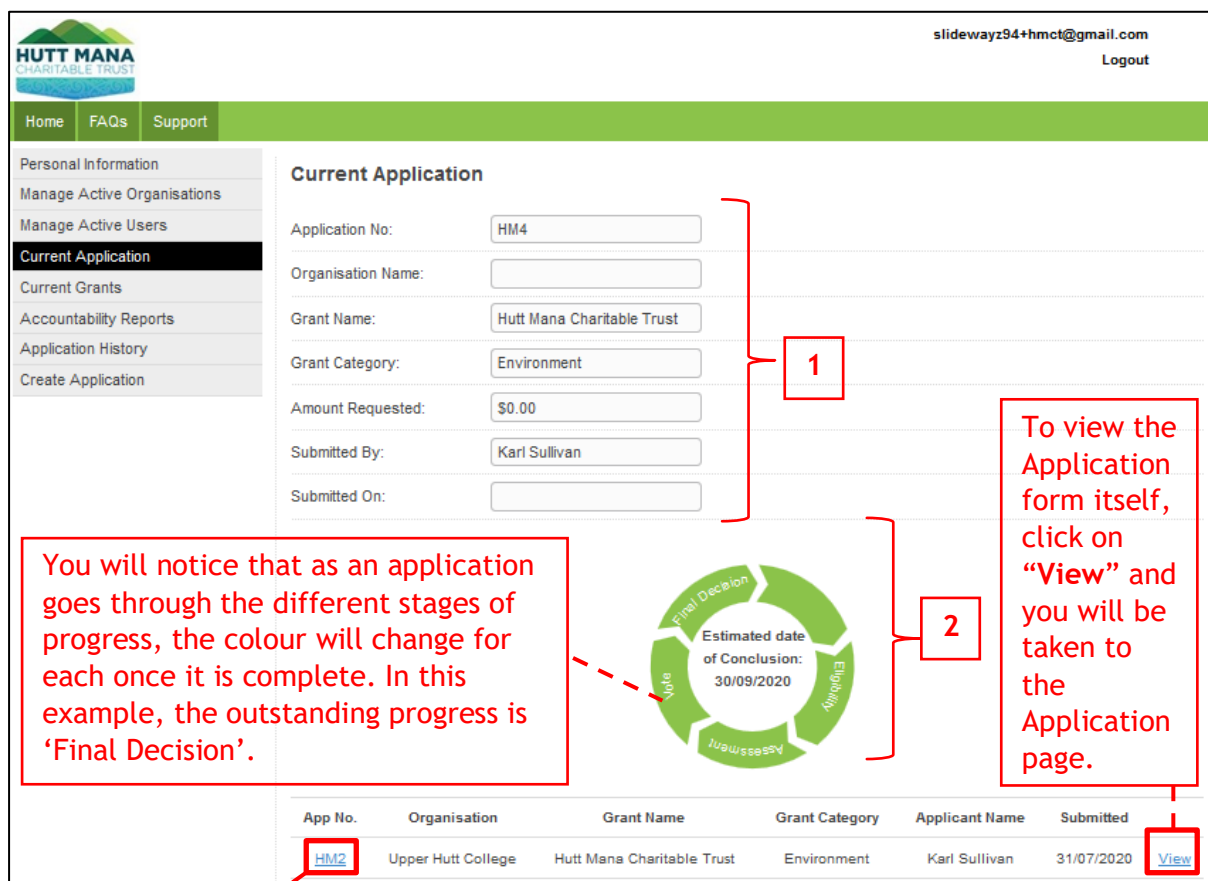
You will be able to see all the applications currently in progress or has been submitted but requires
further action for the selected organisation here.

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

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

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

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

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.

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

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

Accountability Reports

When a grant has been received and used for its purposes the applicant/users can view the details of
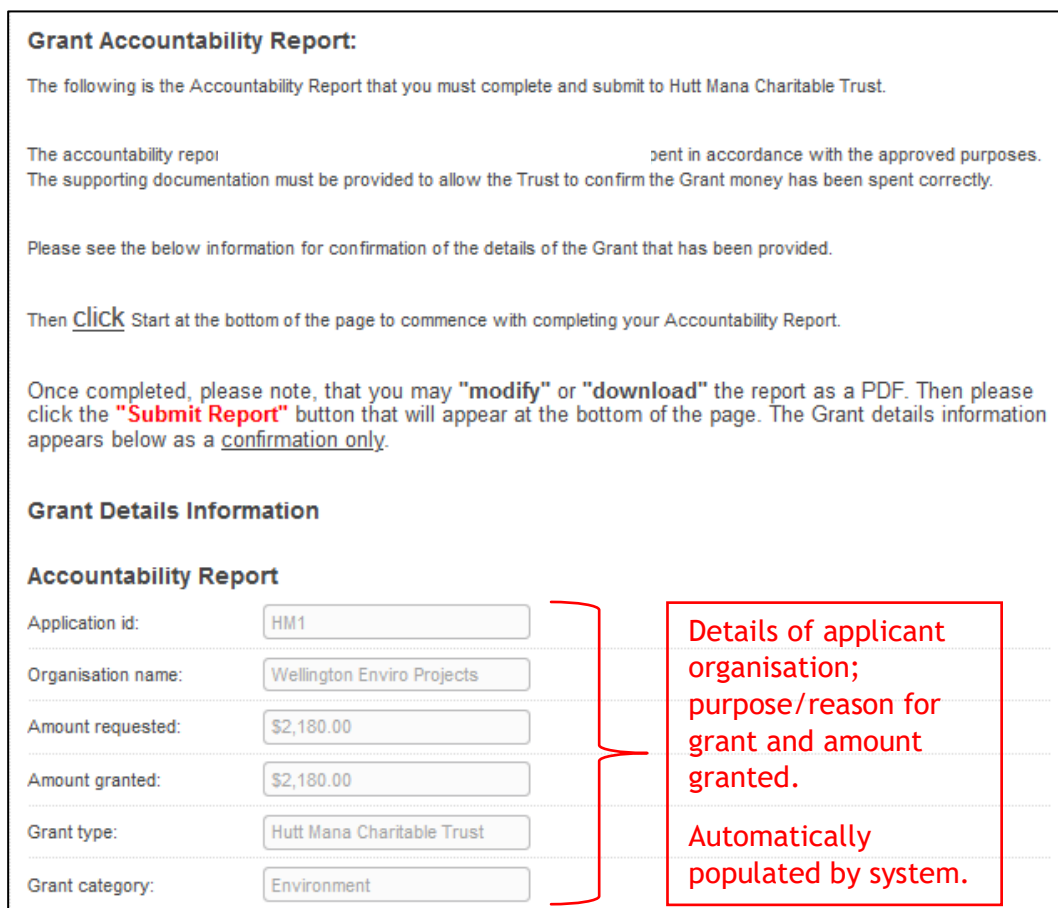the grant and click through this link to go to the accountability report required of them to fill in.

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.

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

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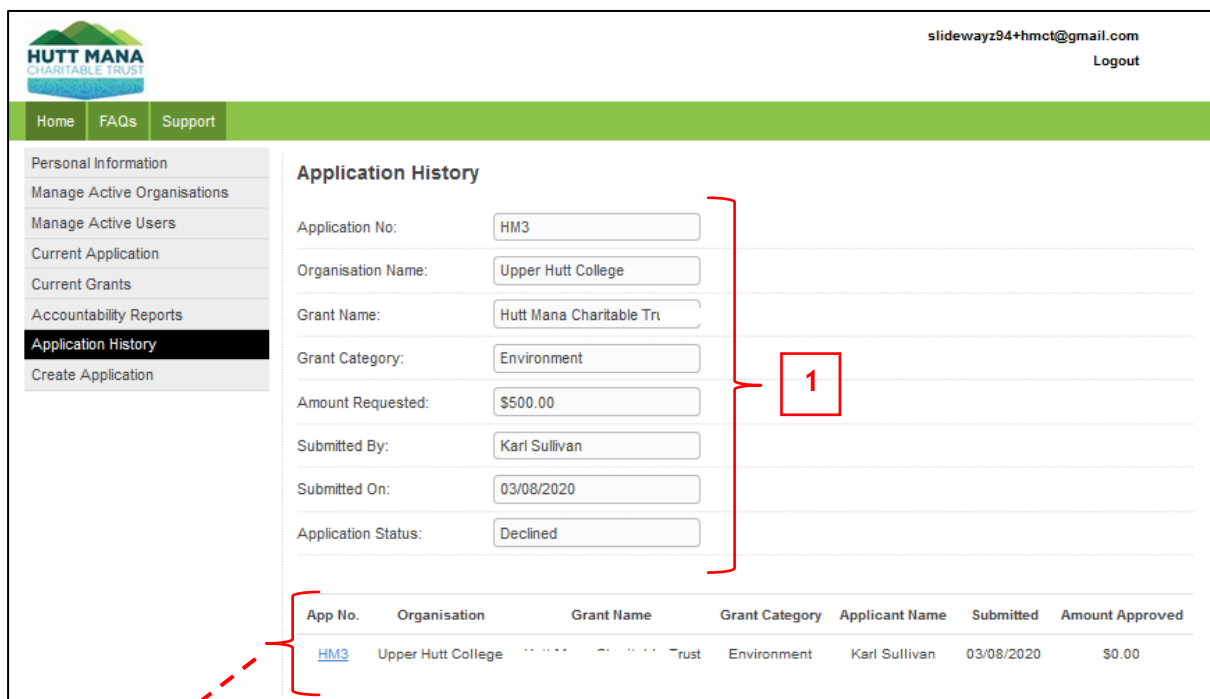Application
→Name of Applicant Organisation   →Who has submitted the Application
→Grant name   →When the Application has been submitted
→Grant category   →Status of Application (Approved, Declined,
etc.)

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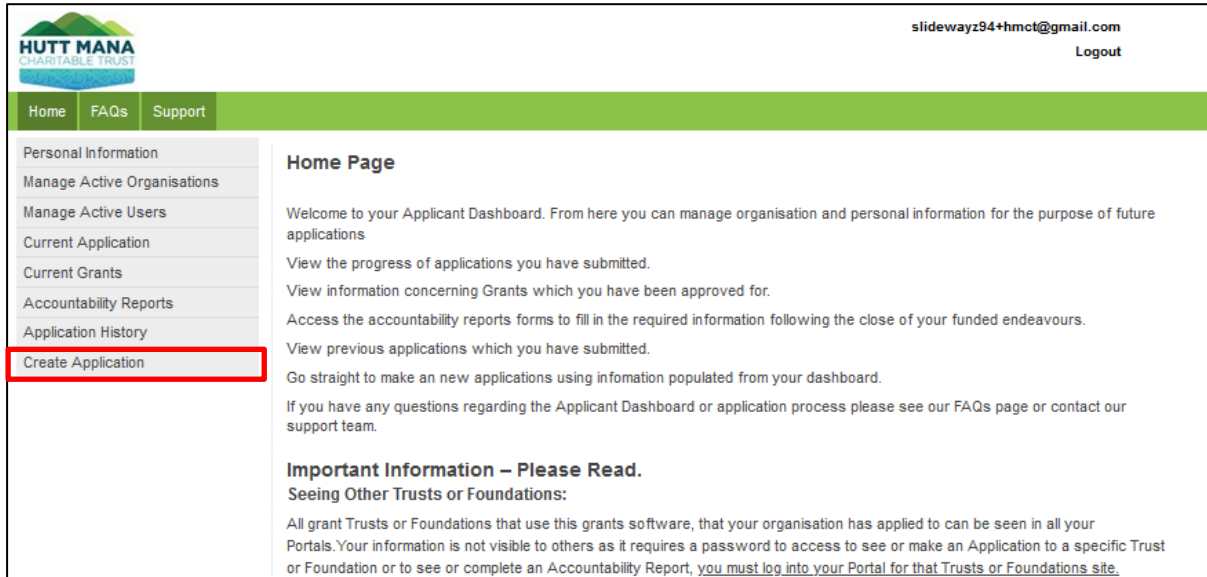click on the "**App No.**"

Create Application

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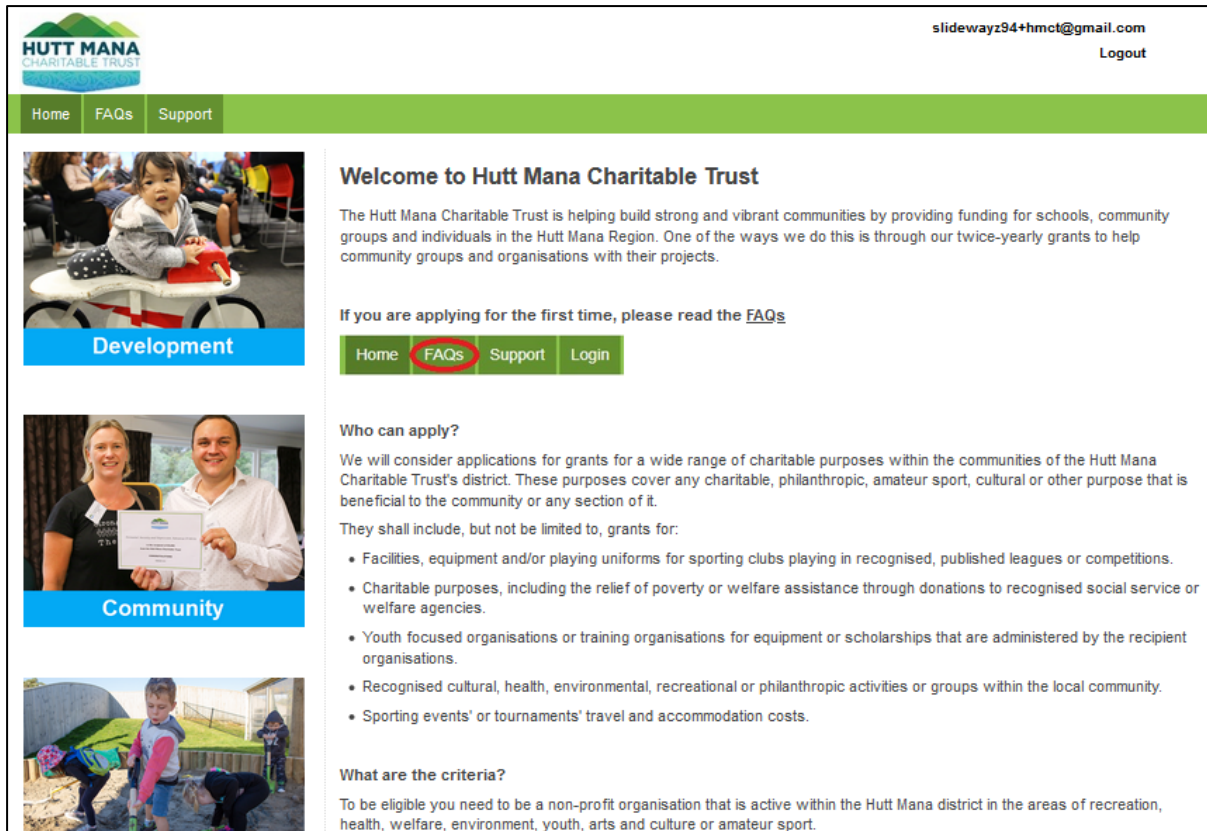
- Organisation info
- Personal info

➢ Click "**Create Application**".

➢ You will be taken to the 'Let's get started' page.

End of Guide