

# Applicant Dashboard

## Applicant Dashboard Guide



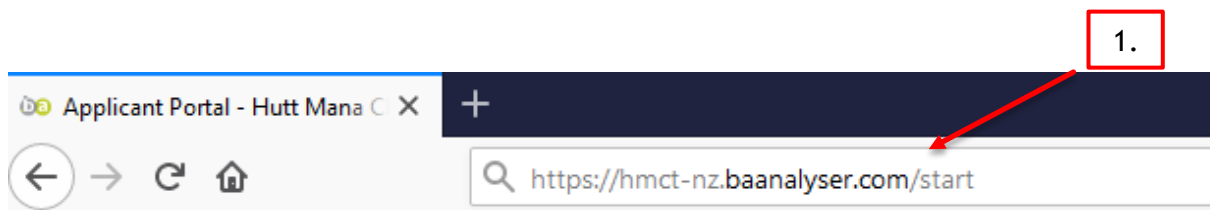
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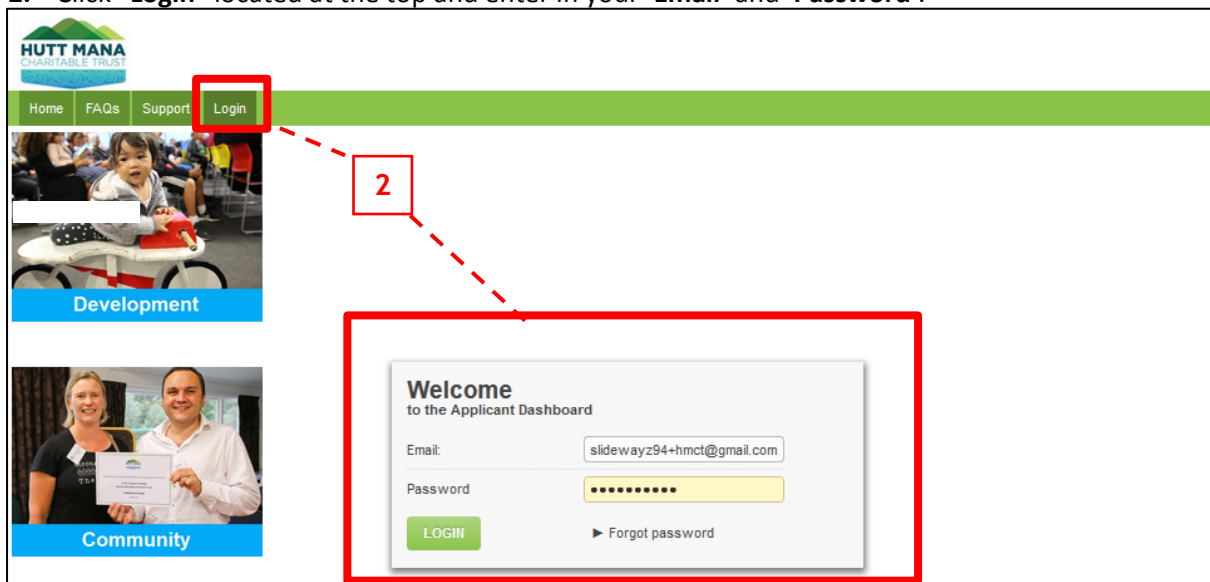
## Accessing the Applicant Dashboard

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.

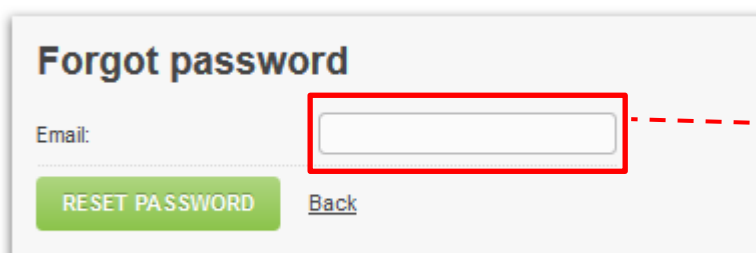


2. Click “Login” located at the top and enter in your ‘Email’ and ‘Password’.



### 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.



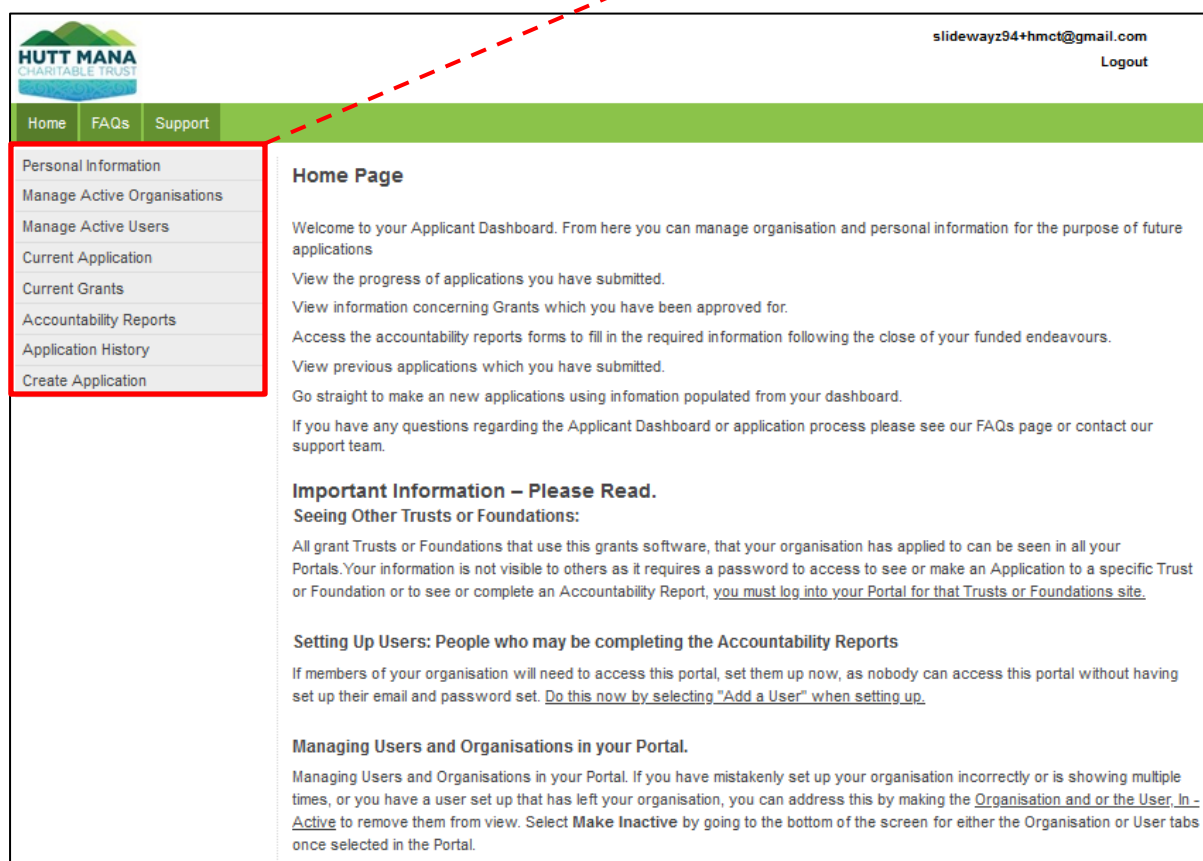
Enter your email and follow the instructions to reset your password.

## 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
Manage Organisations	2
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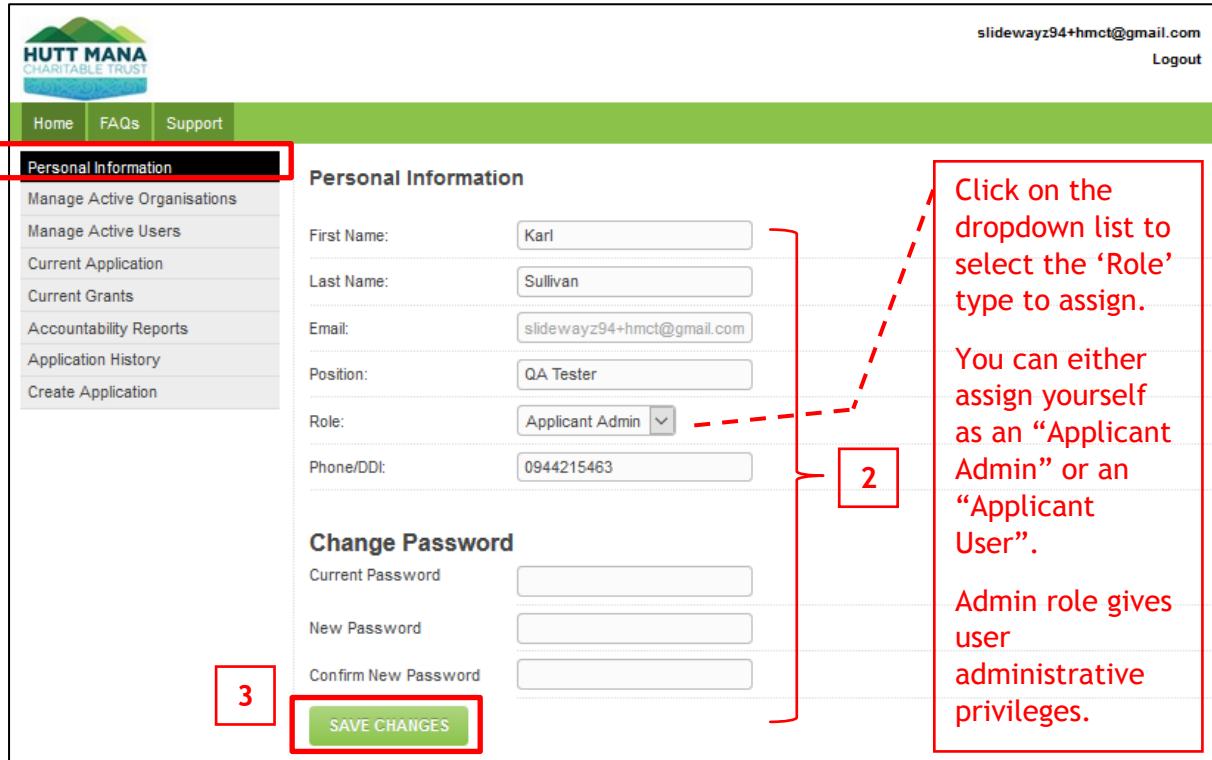


The screenshot shows the Applicant Dashboard interface. At the top, there is a header with the HUTT MANA CHARITABLE TRUST logo on the left, the email address 'slidewayz94+hmct@gmail.com' and a 'Logout' link on the right. Below the header is a green navigation bar with 'Home', 'FAQs', and 'Support' links. On the left side, there is a sidebar 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 'Create Application' item is highlighted with a red box. A red dashed line connects this item to the 'Create Application' item in the table above. 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 displays the Applicant Dashboard for HUTT MANA CHARITABLE TRUST. The top header shows the user's email (slidewayz94+hmct@gmail.com) and a Logout link. The navigation menu on the left includes links to Home, FAQs, Support, and Personal Information (highlighted with a red box and the number 1). The main content area is titled 'Personal Information' and contains the following fields:

- First Name: Karl
- Last Name: Sullivan
- Email: slidewayz94+hmct@gmail.com
- Position: QA Tester
- Role: Applicant Admin (dropdown menu, highlighted with a red box and the number 2)
- Phone/DDI: 0944215463

Below these fields is the 'Change Password' section, which includes input fields for Current Password, New Password, and Confirm New Password. At the bottom of the form is a green 'SAVE CHANGES' button (highlighted with a red box and the number 3).

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

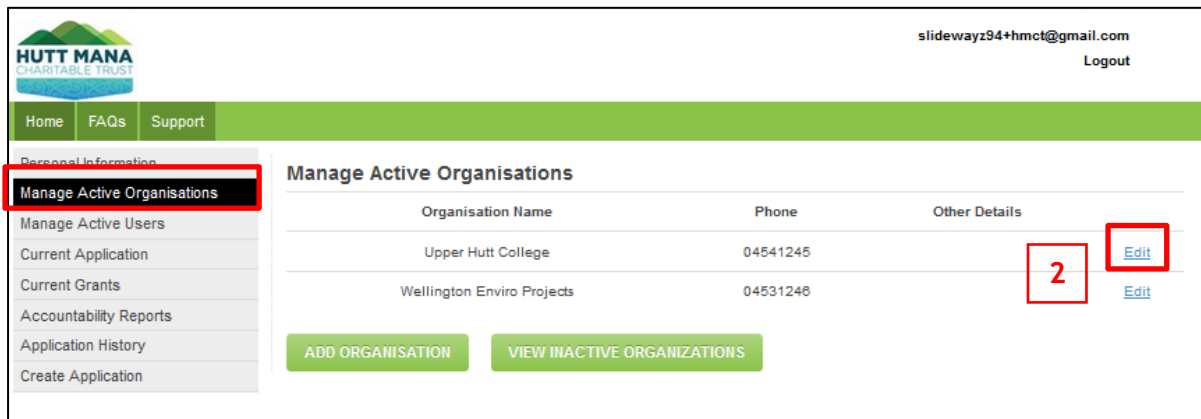
You can either assign yourself as an “Applicant Admin” or an “Applicant User”.

Admin role gives user administrative privileges.

## Manage Organisations

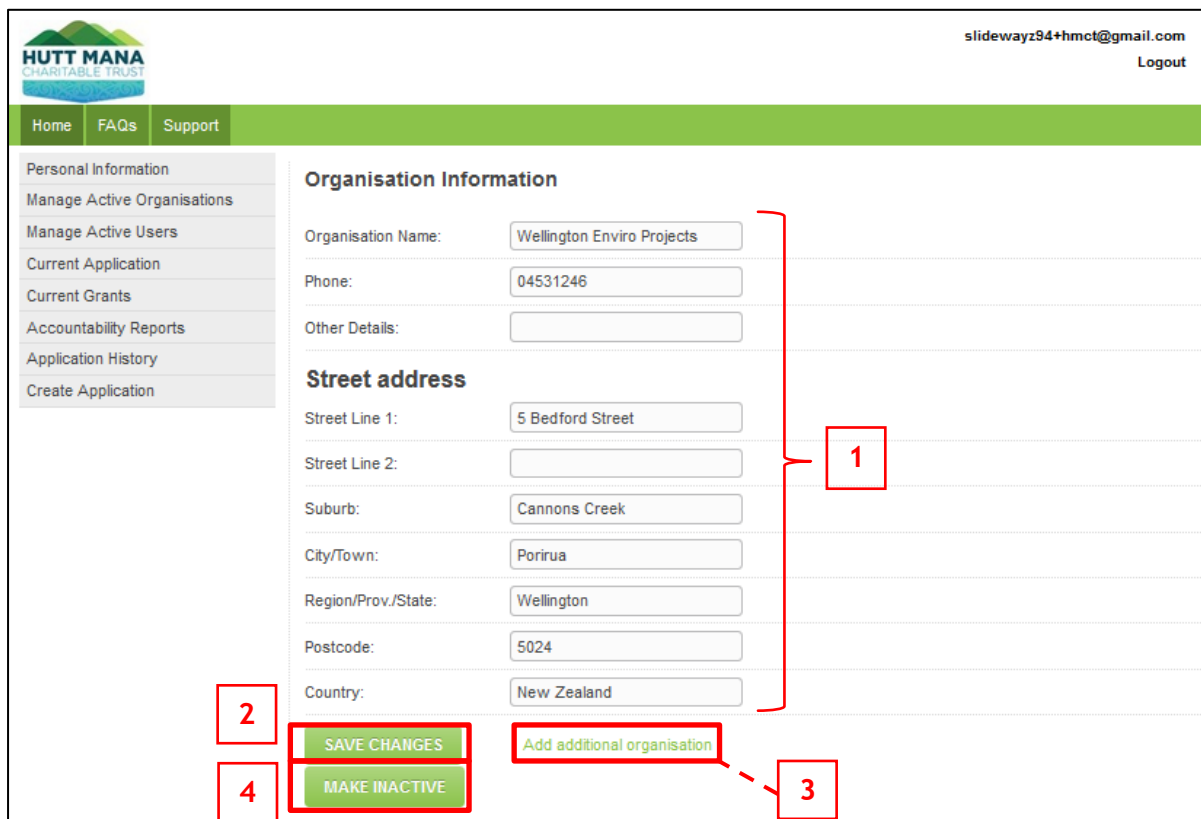
This is where you can view and edit applicant organisation details.

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



The screenshot shows the 'Manage Active Organisations' page. On the left, a sidebar menu has 'Manage Active Organisations' highlighted with a red box and labeled '1'. The main content area features a table with two rows of organisation data. The first row is 'Upper Hutt College' with phone '04541245', and the second is 'Wellington Enviro Projects' with phone '04531246'. Each row has an 'Edit' link to its right, with the 'Edit' link for 'Wellington Enviro Projects' highlighted with a red box and labeled '2'. Below the table are two green buttons: 'ADD ORGANISATION' and 'VIEW INACTIVE ORGANIZATIONS'. The top right of the page shows the user's email 'slidewayz94+hmct@gmail.com' and a 'Logout' link.

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



The screenshot shows the 'Organisation Information' form. The left sidebar menu has 'Manage Active Organisations' highlighted with a red box and labeled '1'. The form contains several input fields: 'Organisation Name' (Wellington Enviro Projects), 'Phone' (04531246), 'Other Details' (empty), 'Street Line 1' (5 Bedford Street), 'Street Line 2' (empty), 'Suburb' (Cannons Creek), 'City/Town' (Porirua), 'Region/Prov./State' (Wellington), 'Postcode' (5024), and 'Country' (New Zealand). A red bracket groups these fields with a red box labeled '1'. At the bottom, there are three buttons: 'SAVE CHANGES' (labeled '2'), 'MAKE INACTIVE' (labeled '4'), and 'Add additional organisation' (labeled '3'). The top right of the page shows the user's email 'slidewayz94+hmct@gmail.com' and a 'Logout' link.

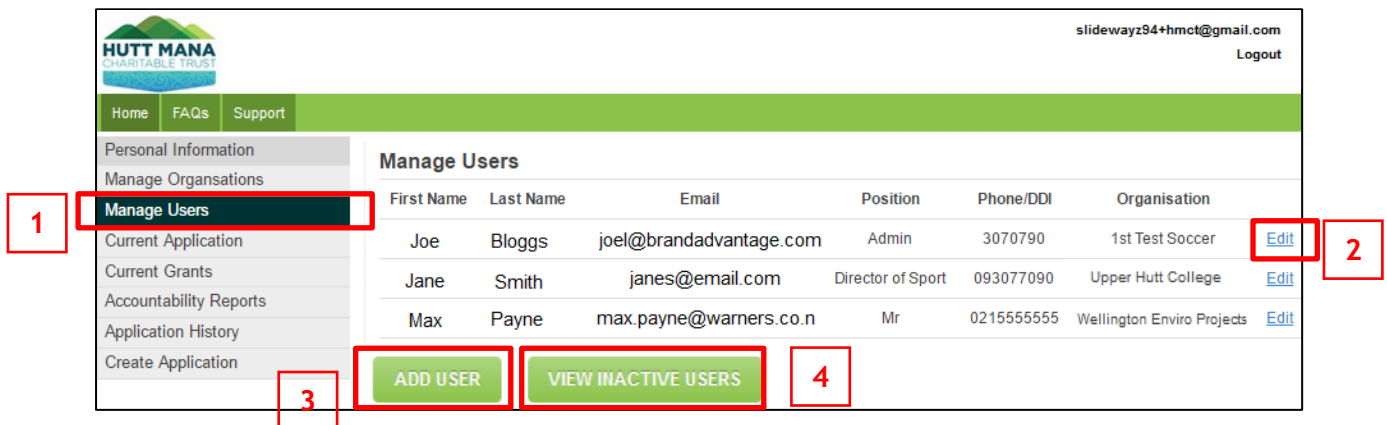


# Accessing the Applicant Dashboard

## 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.

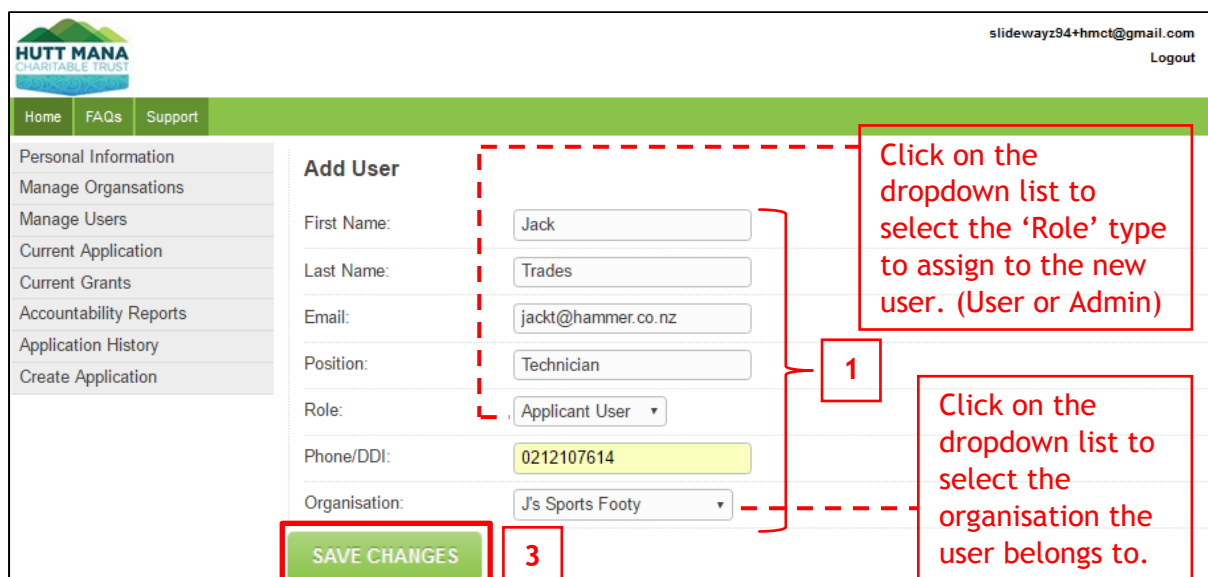


The screenshot shows the 'Manage Users' page. On the left is a sidebar menu with 'Manage Users' highlighted (1). The main area contains a table of users with 'Edit' links (2). At the bottom are 'ADD USER' (3) and 'VIEW INACTIVE USERS' (4) buttons.

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. Fields include First Name, Last Name, Email, Position, Role (dropdown), Phone/DDI, and Organisation (dropdown). A 'SAVE CHANGES' button is at the bottom (3). Red dashed boxes and callouts explain the Role and Organisation dropdowns (1 and 2).

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.

## Current Application

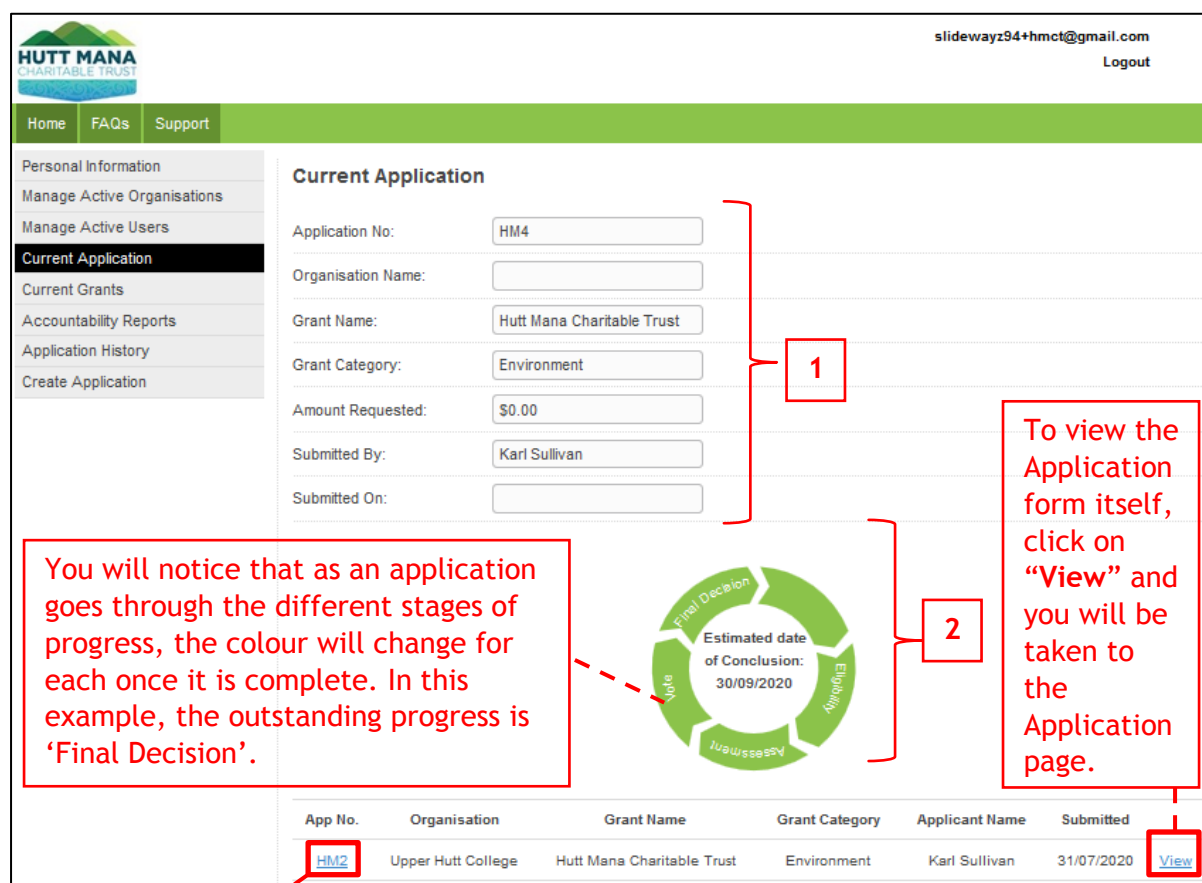
You will be able to see all the applications currently in progress or has been submitted but requires further action for the selected organisation here.

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' form with the following details:

- 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]

Below the form is a progress circle with five stages: Final Decision, Eligibility, Assessment, Vote, and Application. The 'Final Decision' stage is highlighted in green, indicating the current status of the application. The estimated date of conclusion is 30/09/2020.

At the bottom of the dashboard is a table listing applications:

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

Annotations on the screenshot:

- 1**: Points to the application details form.
- 2**: Points to the progress circle.
- 3**: Points to the 'View' link in the application table.
- 4**: Points to the 'App No.' in the application table.

Text boxes explaining the annotations:

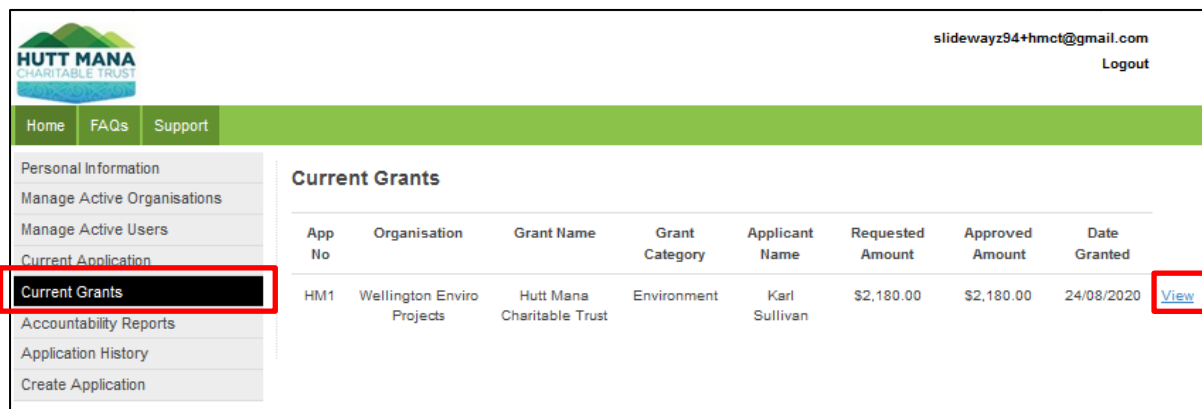
- 1**: To view the Application form itself, click on "View" and you will be taken to the Application page.
- 2**: You will notice that as an application goes through the different stages of progress, the colour will change for each once it is complete. In this example, the outstanding progress is 'Final Decision'.
- 3**: To view the progress of a particular application, click on the "App No."
- 4**: To view the Application form itself, click on "View" and you will be taken to the Application page.



## 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.

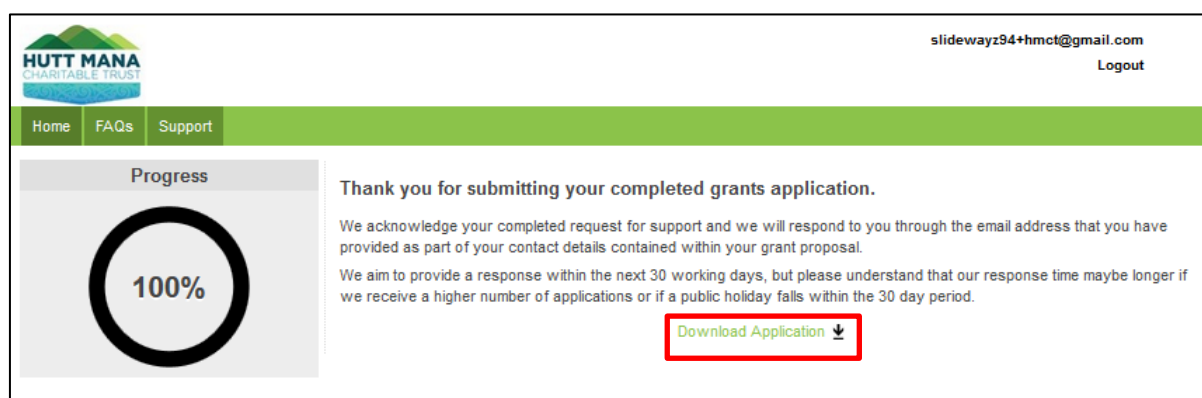
1. Click “**Current Grants**” to access.
2. To view an approved grant application, click “**View**” located on the right.



The screenshot shows the Hutt Mana Charitable Trust Applicant Dashboard. The user is logged in as slidewayz94+hmct@gmail.com. The left sidebar contains a menu with options: Home, FAQs, Support, Personal Information, Manage Active Organisations, Manage Active Users, Current Application, **Current Grants** (highlighted with a red box labeled '1'), Accountability Reports, Application History, and Create Application. 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> (highlighted with a red box labeled '2')

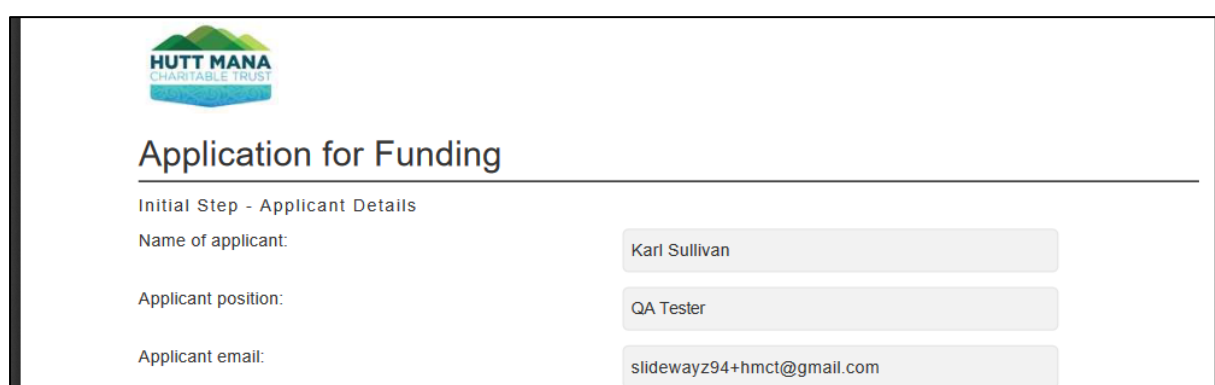
3. To view the approved grant, you will need to click “**Download Application**”. A PDF document will be generated and downloaded to your computer.



The screenshot shows the Hutt Mana Charitable Trust Applicant Dashboard. The user is logged in as slidewayz94+hmct@gmail.com. The left sidebar contains a menu with options: Home, FAQs, Support, Personal Information, Manage Active Organisations, Manage Active Users, Current Application, **Current Grants** (highlighted with a red box labeled '1'), Accountability Reports, Application History, and Create Application. 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> (highlighted with a red box labeled '2')

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



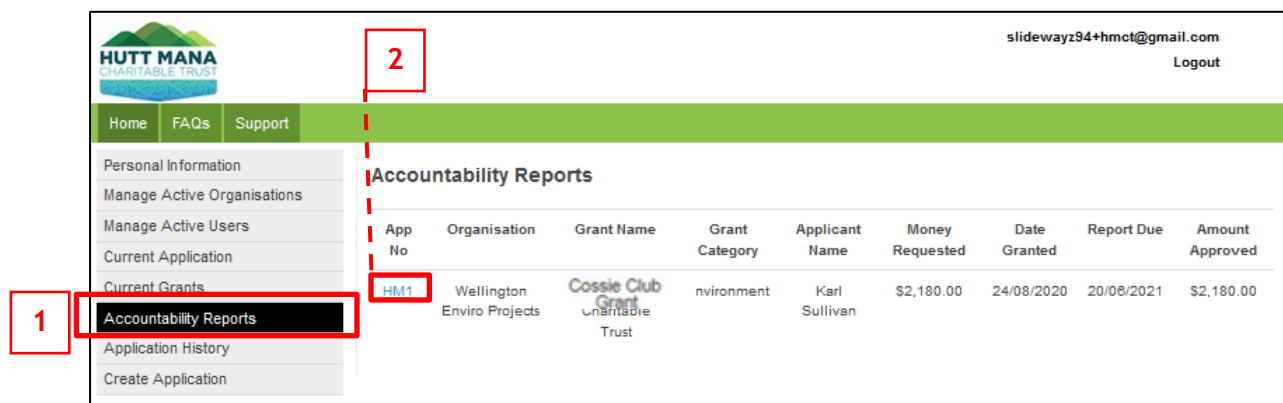
The screenshot shows the 'Application for Funding' PDF document. The document has the Hutt Mana Charitable Trust logo at the top. Below the logo, the title 'Application for Funding' is displayed. The document is titled 'Initial Step - Applicant Details'. The applicant's details are as follows:

Field	Value
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 for Hutt Mana Charitable Trust. The user is logged in as 'slidewayz94+hmct@gmail.com'. The dashboard has a green header with 'Home', 'FAQs', and 'Support' links. A sidebar on the left contains a list of navigation options: '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	Cosie Club Grant	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

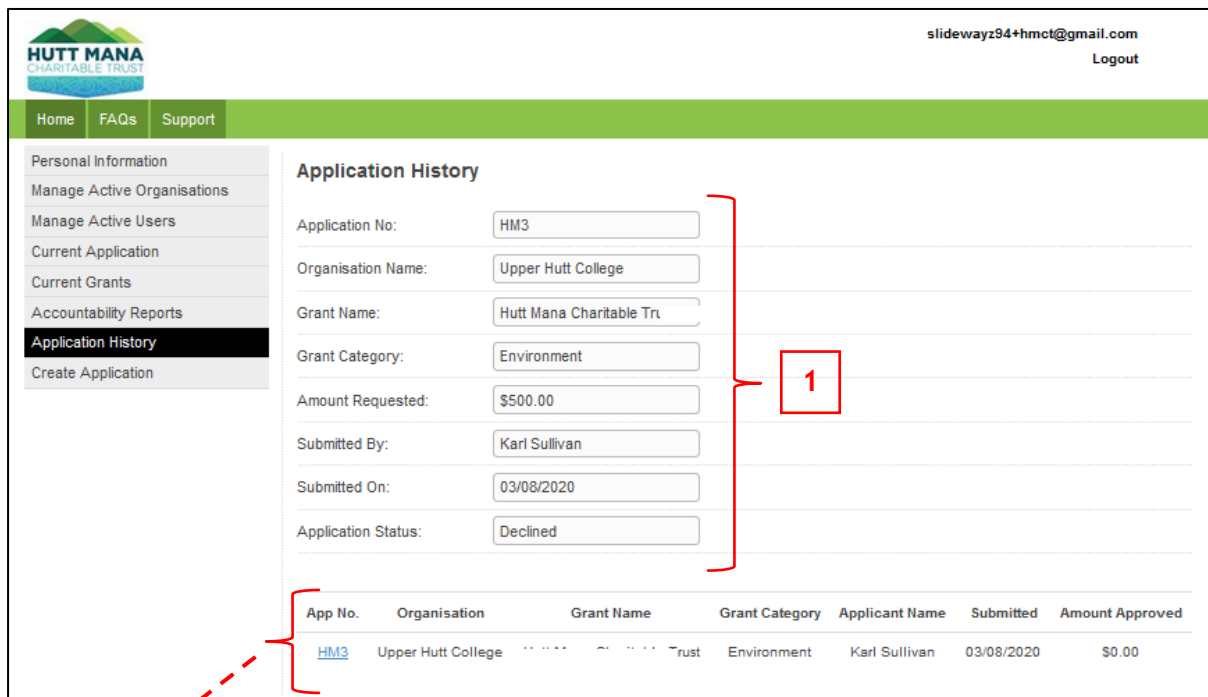
→ Grant category  
etc.)

→ Requested amount from the

→ Who has submitted the Application

→ When the Application has been submitted

→ Status of Application (Approved, Declined,



The screenshot shows the Hutt Mana Charitable Trust Applicant Dashboard. The top navigation bar includes Home, FAQs, and Support. The left sidebar lists various options, with 'Application History' highlighted. The main content area displays the 'Application History' form, which includes fields for Application No., Organisation Name, Grant Name, Grant Category, Amount Requested, Submitted By, Submitted On, and Application Status. A red bracket labeled '1' points to the 'Application No.' field. Below the form is a table with columns: App No., Organisation, Grant Name, Grant Category, Applicant Name, Submitted, and Amount Approved. The first row of the table shows application HM3 for Upper Hutt College, Environment category, submitted by Karl Sullivan on 03/08/2020, with an amount approved of \$0.00. A red dashed line points from a text box to the 'App No.' column header.

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

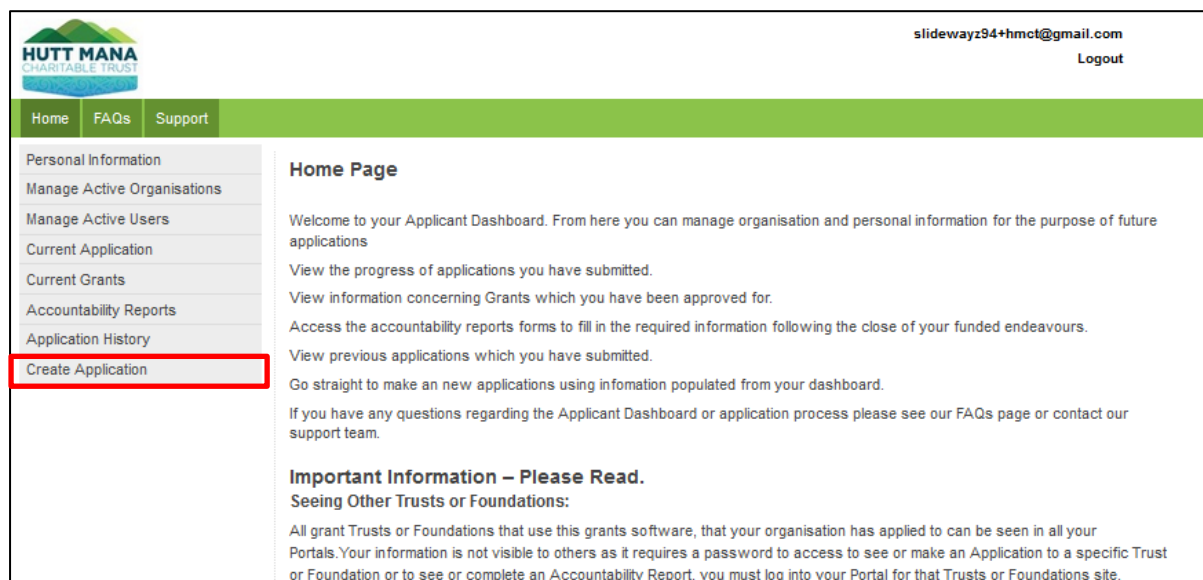
To view a particular application history, click on the "App No."

## 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 Home Page. The top navigation bar includes 'Home', 'FAQs', and 'Support'. A sidebar on the left lists various options, with 'Create Application' highlighted in a red box. The main content area welcomes the user and provides instructions on how to manage applications and grants. It also includes a section for 'Important Information – Please Read' regarding the visibility of grant information.

**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.

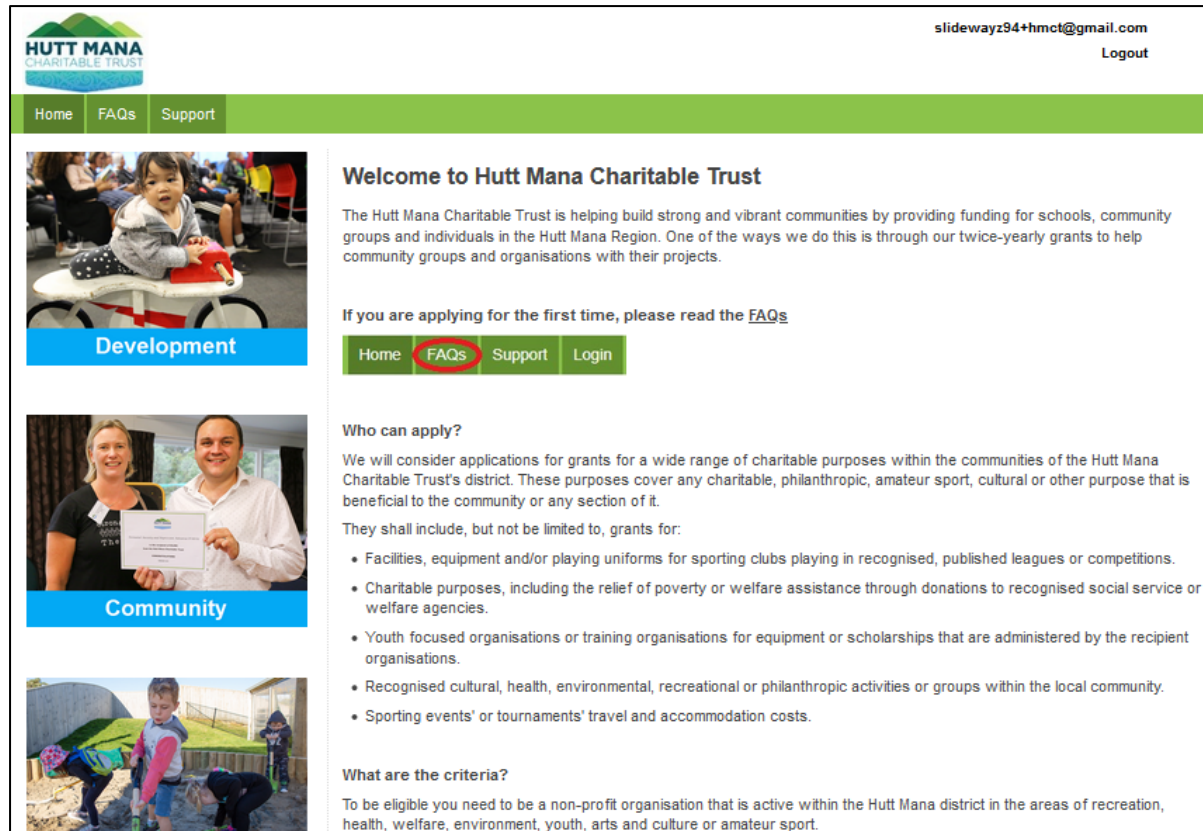
If you have any questions regarding the Applicant Dashboard or application process please see our FAQs page or contact our support team.

**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.

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



The screenshot shows the 'Let's get started' page. It features a welcome message, a list of application categories (Development, Community, and a third one partially visible), and a section for 'Who can apply?'. The 'FAQs' link in the top navigation bar is circled in red. The 'Who can apply?' section lists various purposes for which grants are available, including facilities, equipment, and youth-focused activities.

**Welcome to Hutt Mana Charitable Trust**

The Hutt Mana Charitable Trust is helping build strong and vibrant communities by providing funding for schools, community groups and individuals in the Hutt Mana Region. One of the ways we do this is through our twice-yearly grants to help community groups and organisations with their projects.

If you are applying for the first time, please read the [FAQs](#)

**Who can apply?**

We will consider applications for grants for a wide range of charitable purposes within the communities of the Hutt Mana Charitable Trust's district. These purposes cover any charitable, philanthropic, amateur sport, cultural or other purpose that is beneficial to the community or any section of it.

They shall include, but not be limited to, grants for:

- Facilities, equipment and/or playing uniforms for sporting clubs playing in recognised, published leagues or competitions.
- Charitable purposes, including the relief of poverty or welfare assistance through donations to recognised social service or welfare agencies.
- Youth focused organisations or training organisations for equipment or scholarships that are administered by the recipient organisations.
- Recognised cultural, health, environmental, recreational or philanthropic activities or groups within the local community.
- Sporting events' or tournaments' travel and accommodation costs.

**What are the criteria?**

To be eligible you need to be a non-profit organisation that is active within the Hutt Mana district in the areas of recreation, health, welfare, environment, youth, arts and culture or amateur sport.

*End of Guide*