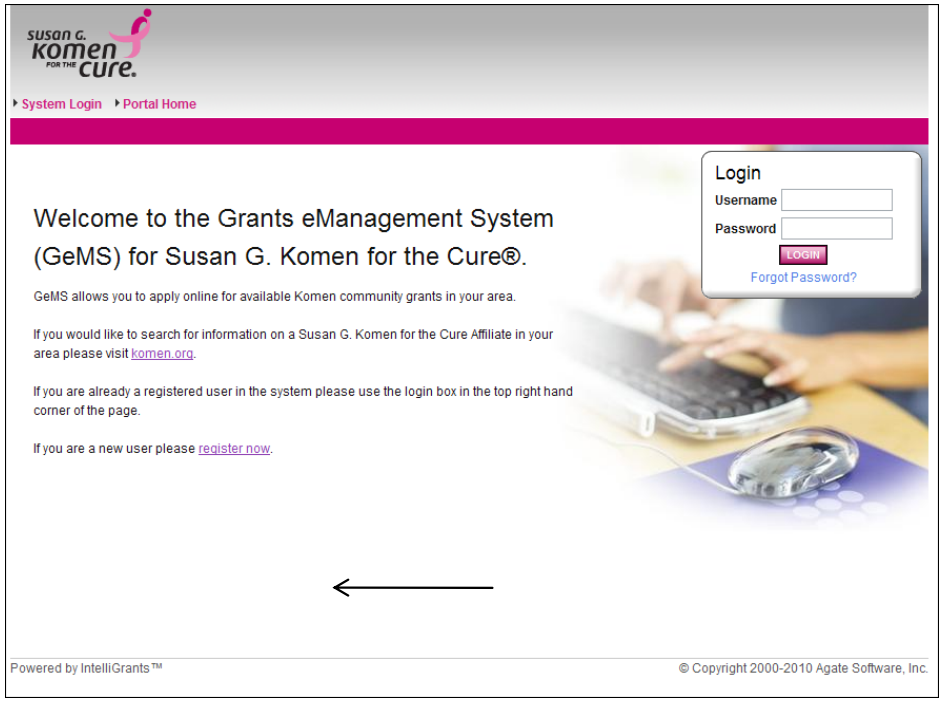
User Registration

1. Select New User link on the login page.
2. Complete all of the user registration questions.
3. As you complete the questions, you must press the Pink Go Button if it is next to a question.
4. Create username and password.
5. Depending on the role of the user registering, complete the remainder of the questions.
6. Select the save button.

You will receive a message at the top of the page if you have any errors on your registration page as well as if your registration was successful.

Registration for the system is the first step to the online grantmaking process. You can register at https://affiliategrants.komen.org.

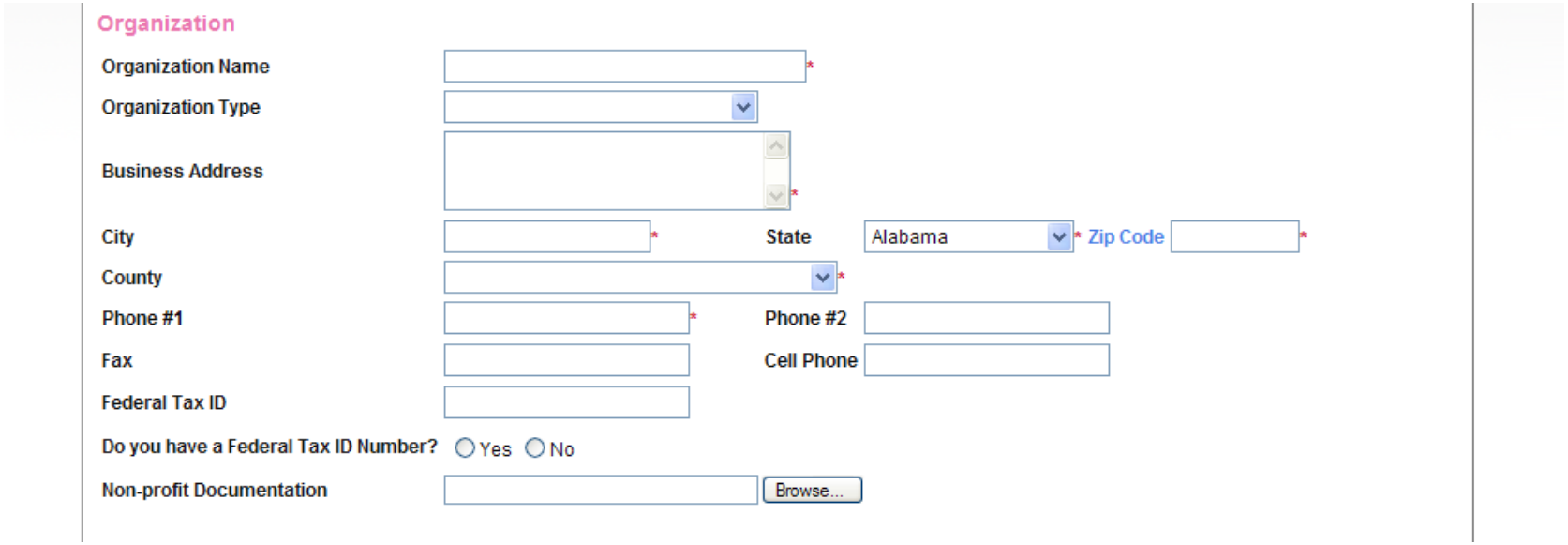
Registration



https://affiliategrants.komen.org

- **All user types must complete all of the basic questions during registration.**
- **Certain user types will be asked to complete more information. Reviewers will be asked to complete reviewer questions and the COI information. All Affiliate users will be asked to complete the COI information.**
- **It is important that all user types know that they must press the pink go button if it is next to a question. Hitting the pink go button is what triggers the next set of information.**
- **If you are an Affiliate user, anything except applicant or grantee, your organization should always be the Affiliate.**
- **If you are an applicant or grantee and your organization is not available on the list, you should select other and complete the organization registration as well.**

Registration Page / Organization



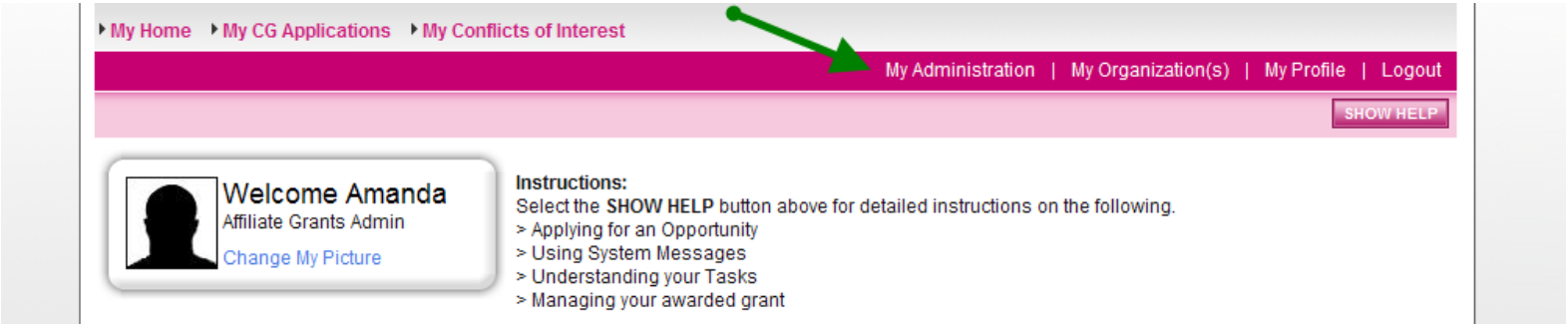
- **If an applicant registers for the system and their organization does not exist, they must complete the organization registration as well. This information will only appear during registration if the user chooses “other” from the organization drop down list in the previous registration section.**
- **All required fields must be completed.**
- **The zip code field must be the 9 digit zip code. If a user needs to research the last 4 digits, they can click on the zip code words and a zip code finder will open in another window, not effecting the work being done on the registration page.**
- **If an organization has a Federal Tax ID, they must include it. If they do not, they need to upload documentation that proves non-profit status.**

Validating Users

1. Log in.
2. Select the *My Administration* link.
3. Click the link for *User Approval for Affiliate Administrators.*
4. Search for new system users.
5. Complete the validation process.

- **To validate a user, the AGA and Project Director will have to follow multiple steps. Each of these steps must be completed to successfully validate a user.**

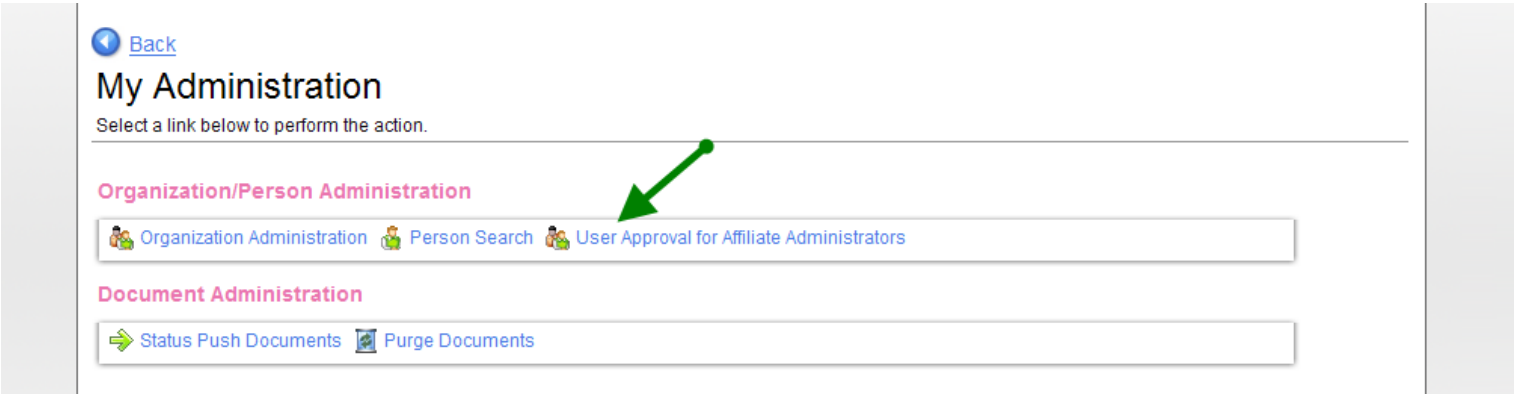
Validating Users /
My Administration Link



The My Administration tab is available in the top right hand corner of the home page.

- **First, find “my administration” tab and click on it.**

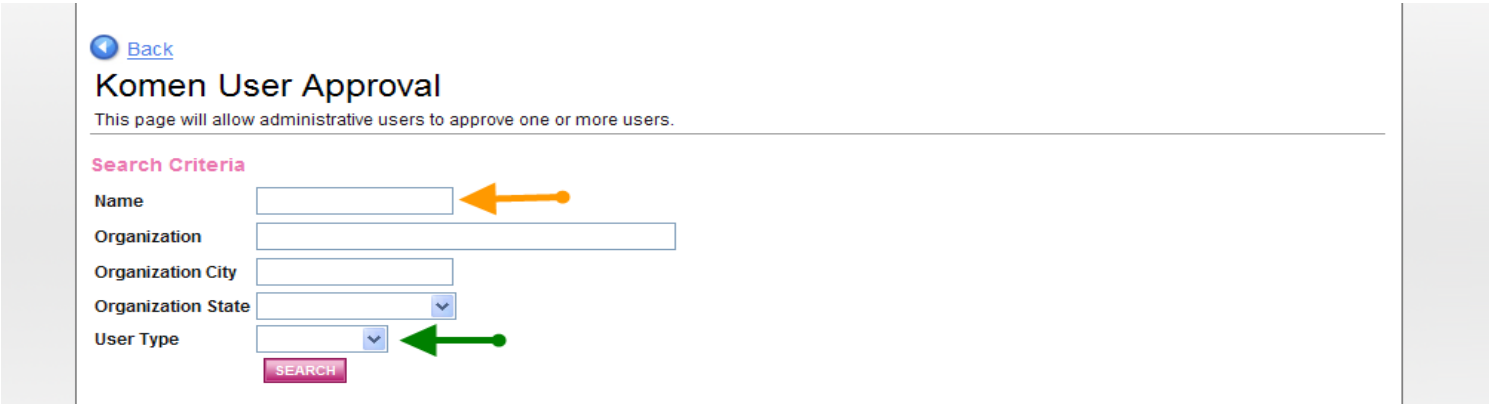
Validating Users /
User Approval for Affiliate Administrators



The User Approval for Affiliate Administration Link is available under the Organization/Person Administration section.

- **Second, click on the user approval for Affiliate Administrators link under the organization/person administration section within the My Administration Link.**

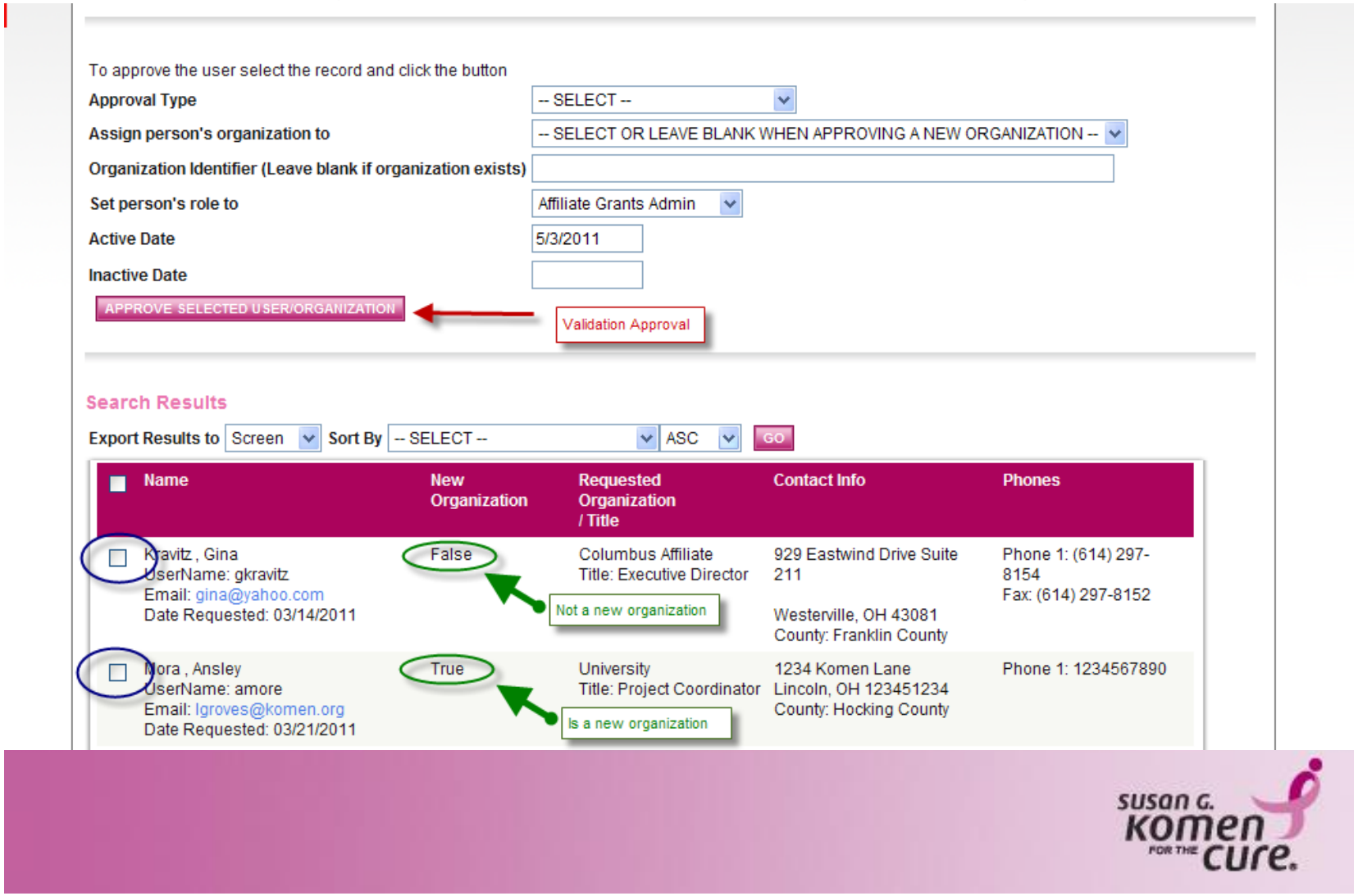
Validating Users / User Approval Search



You can search for a particular new user by name or organization or you can search for new users by selecting "new users" under the user type field.

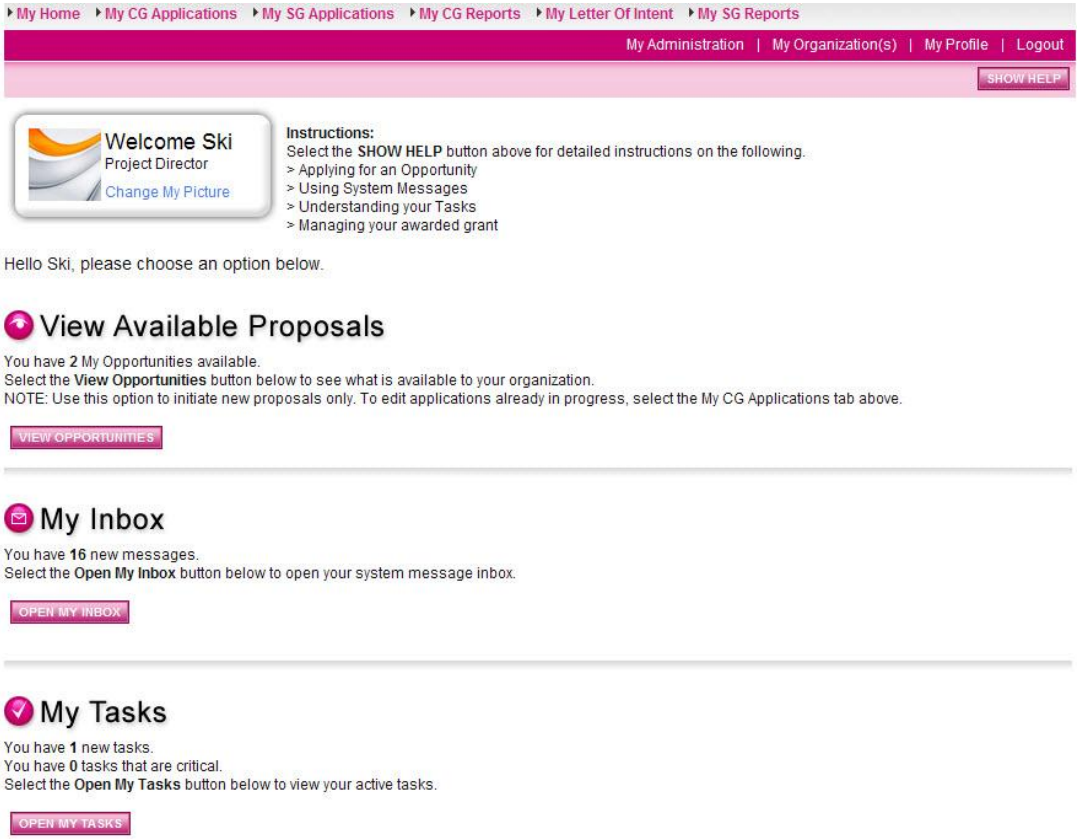
- **If you select "new users" in the user type drop down list you will be displayed all new users within your Affiliate waiting to be validated.**
- **If you search by user name or organization, your list of displayed users should be more specific to what you are looking for.**

Validating Users / Validation Page



- **Approval type field will select whether you are validating just a user or an organization as well. In the list of users at the bottom of the screen you can see if the user has also registered a new organization by looking at the new organization column. False means it is not a new organization. True means it is a new organization.**
- **Assign person's organization to field should be left blank if you are approving a new organization. If you are not approving a new organization, the users correct organization should be picked from the list. You can use the requested organization/title column in the list below to establish the correct organization.**
- **The organization identifier should be left blank if the organization already exists but if you are validating a new organization, a unique identifier needs to be created. We are still establishing the exact formula for organization short names, so for now just create and org short name for new organizations.**
- **Setting a persons role – Choose the most appropriate user role for each individual that you are validating.**
- **Once you have completed the fields, check the box next to the person that you wish to validate.**
- **Click the *Approve Selected User/Organization* button.**
- **You will receive a message at the top of the page if your validation is completed.**
- **During the testing phase, Always go back and test that users log in information and assure they can get into the system.**
- **If you try to validate a user but have an error during the validation, you will have to reselect the user on the search results list.**

Homepage


My Home
My CG Applications
My SG Applications
My CG Reports
My Letter Of Intent
My SG Reports
My Administration | My Organization(s) | My Profile | Logout
SHOW HELP
Welcome Ski
Project Director
Change My Picture
Instructions:
Select the SHOW HELP button above for detailed instructions on the following.
> Applying for an Opportunity
> Using System Messages
> Understanding your Tasks
> Managing your awarded grant
Hello Ski, please choose an option below.
View Available Proposals
You have 2 My Opportunities available.
Select the View Opportunities button below to see what is available to your organization.
NOTE: Use this option to initiate new proposals only. To edit applications already in progress, select the My CG Applications tab above.
VIEW OPPORTUNITIES
My Inbox
You have 16 new messages.
Select the Open My Inbox button below to open your system message inbox.
OPEN MY INBOX
My Tasks
You have 1 new tasks.
You have 0 tasks that are critical.
Select the Open My Tasks button below to view your active tasks.
OPEN MY TASKS

User Tabs

My Home: Brings the user back to their homepage

My CG Applications: Access to all community grants applications already in progress

My SG Applications: Access to all small grant applications already in progress

My CG Reports: Access to all community grant progress and final reports already in progress

My SG Reports: Access to all small grant final reports already in progress

My Administration: Administrator functions, user approval. This tab will only appear for authorized users.

My Organization: Current information about your organization. (This information can be updated at any time by authorized users)

My Profile: Individual user information. (This information can be updated at any time)

Logout: Logout of the system

View Available Proposals: Initiate a new grant application offered by the Affiliate.

My Inbox: System notifications regarding system users and application status.

My Tasks: List of current tasks that you must complete.

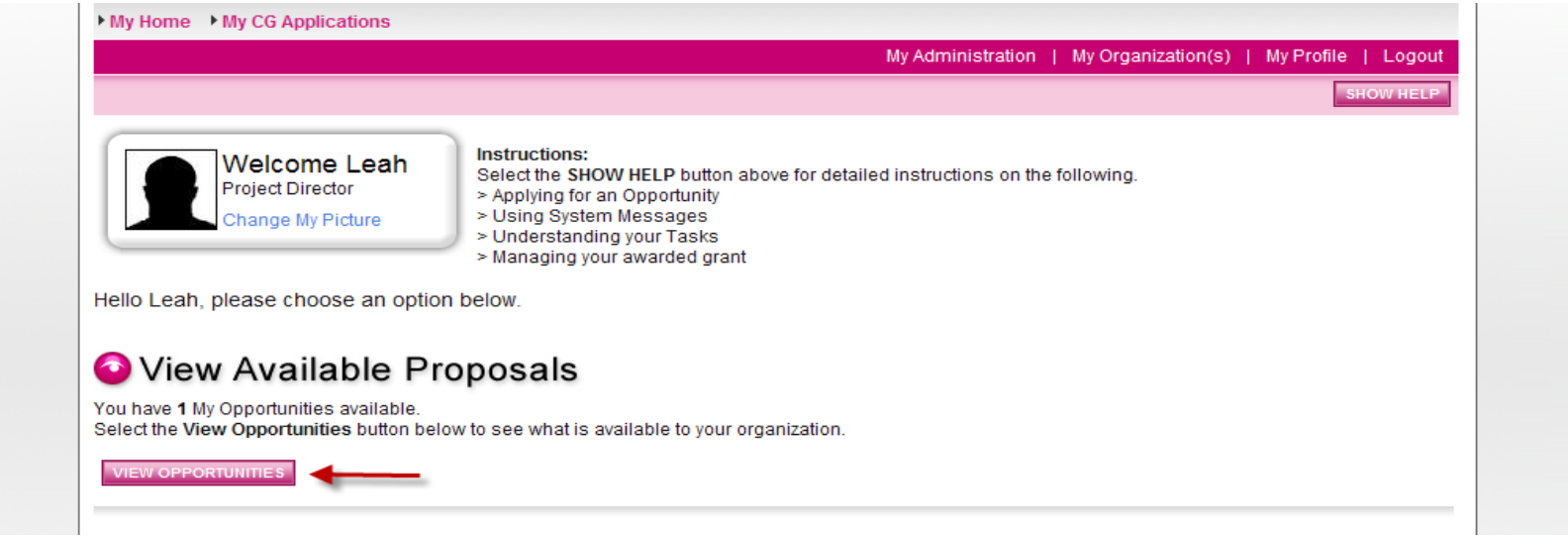
Helpful Hint: To view/edit/complete applications that are already in progress, go to your "My CG Applications" tab. To initiate a new or additional application, click on the "View Available Proposals" tab.

Application Creation

1. Applicant enters GeMS.
2. Click on *View Opportunities* under the View Available Proposals Section.
3. Click the *Apply Now* button.
4. Click the *I Agree* button.
5. Under View, Edit, and Complete Forms, click *View Forms*.
6. Click on the section of the application you would like to complete.

- **First you must log into the system as an Applicant.**
- **Then you will click on the view opportunities button under the View Available proposals section to start a new application.**
- **You must then click on the apply now button, after reviewing the grant cycle information.**
- **Lastly, you must select the I agree button to officially start an application. Once this is done, you can more easily access you application through the my application tab.**
- **Now click the View Forms button to enter the application. The list on the view forms page is the Application pages. For completing the application process, an applicant will only fill out the application and budget forms.**

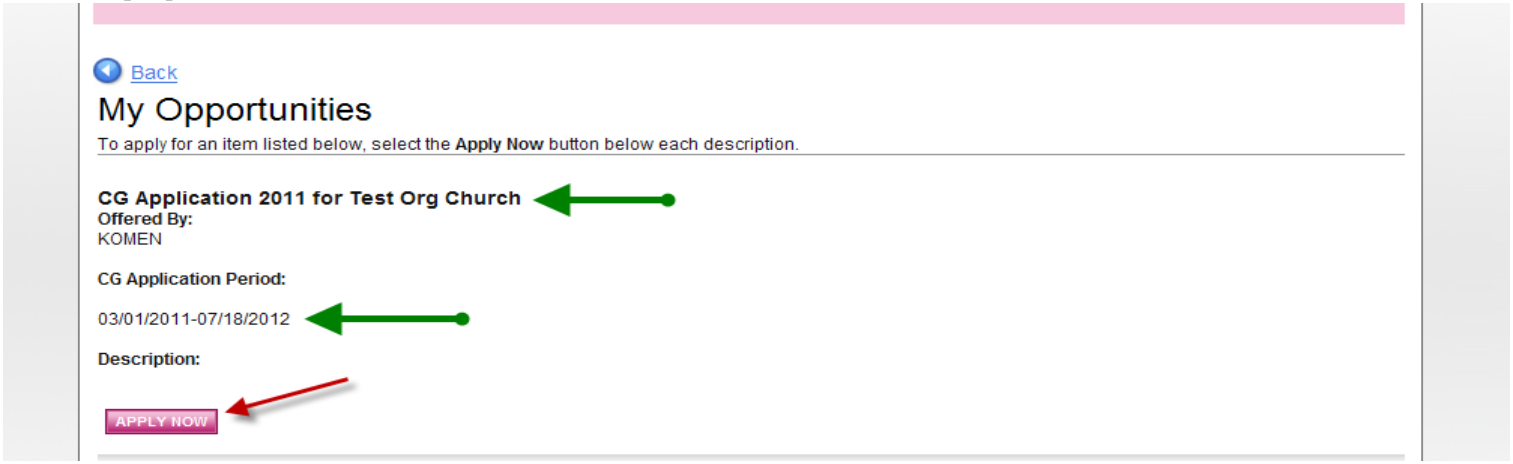
Application Creation



An applicant must select View Opportunities under View Available Proposals section to create a new application.

- **If an organization does not already have an open application or would like to create a new application, they must go into the view opportunities section to create a new application.**

Application Creation



•An applicant should review the organization name and the application period.

•Then click the Apply Now button.

- **When creating a new application, an applicant should always verify their organization at the top of the page and the grant period.**
- **After reviewing the information and verifying that the application should be created, the applicant will click the Apply Now button.**

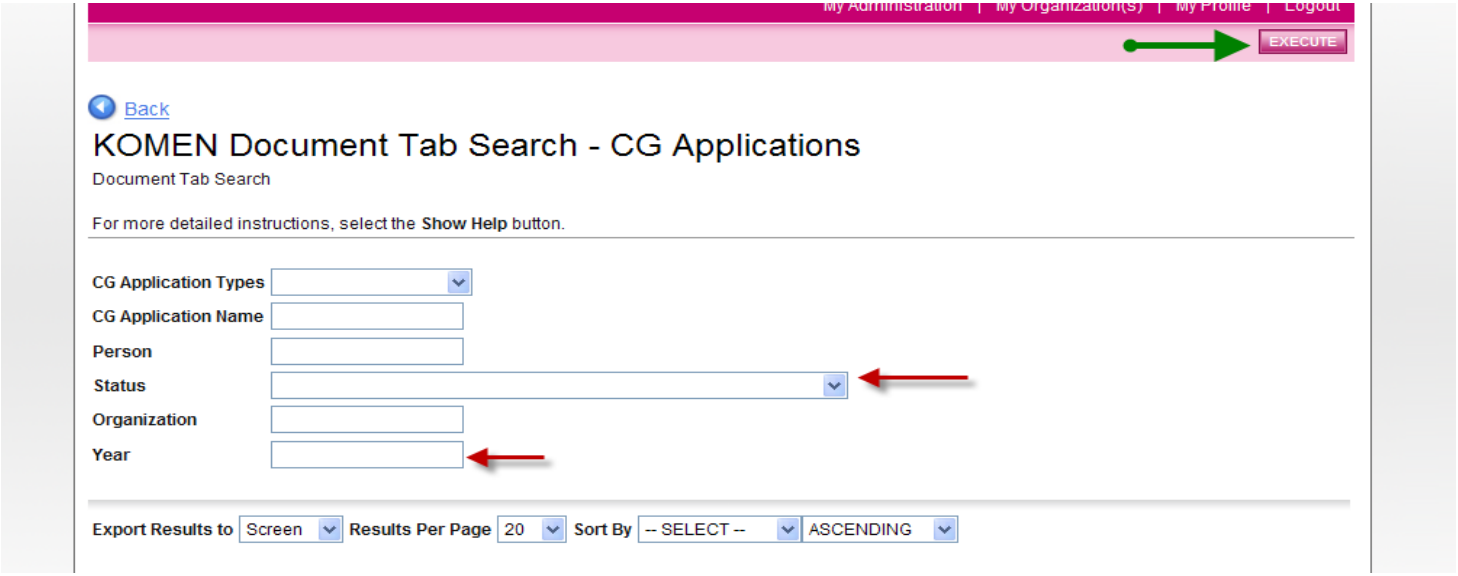
Application Creation

•If the applicant would like to complete the creation of the application, they should click I Agree.

•If the applicant decides not to create the application, they should click I Do Not Agree.

- **This is the final step to create a new application. I the applicant wants to complete the process they should click I agree, if they don't want to complete the process they should click I do not agree.**

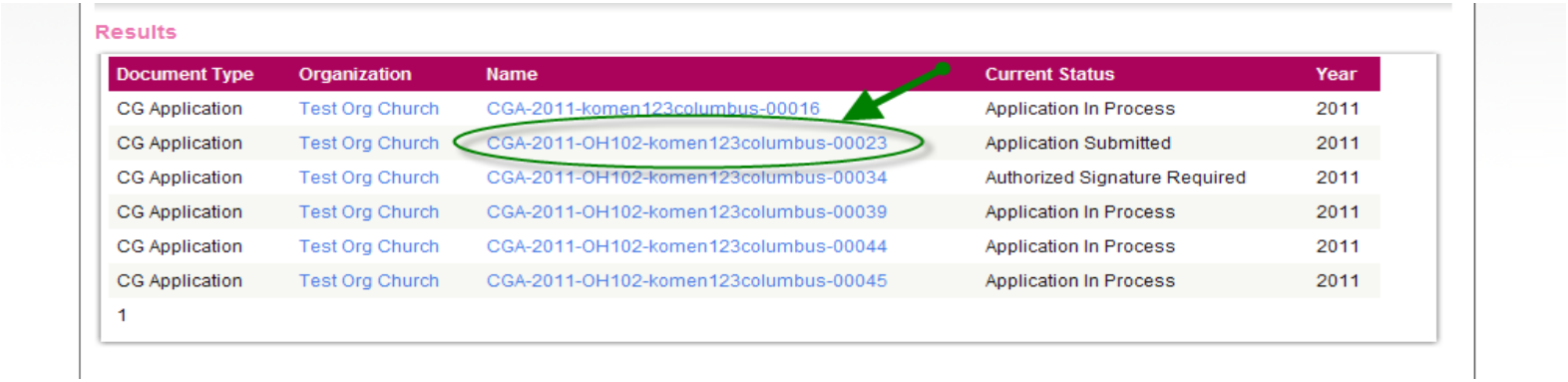
Application Process



Applicants can search for the Application they are looking for.

- **An applicant can easily search for their application by application status or year. Or an applicant can complete a blank search to receive a full list of their organization's applications.**
- **Once the search criteria has been completed, the applicant must click the execute button at the top, right side of the page.**

Application Process


Results

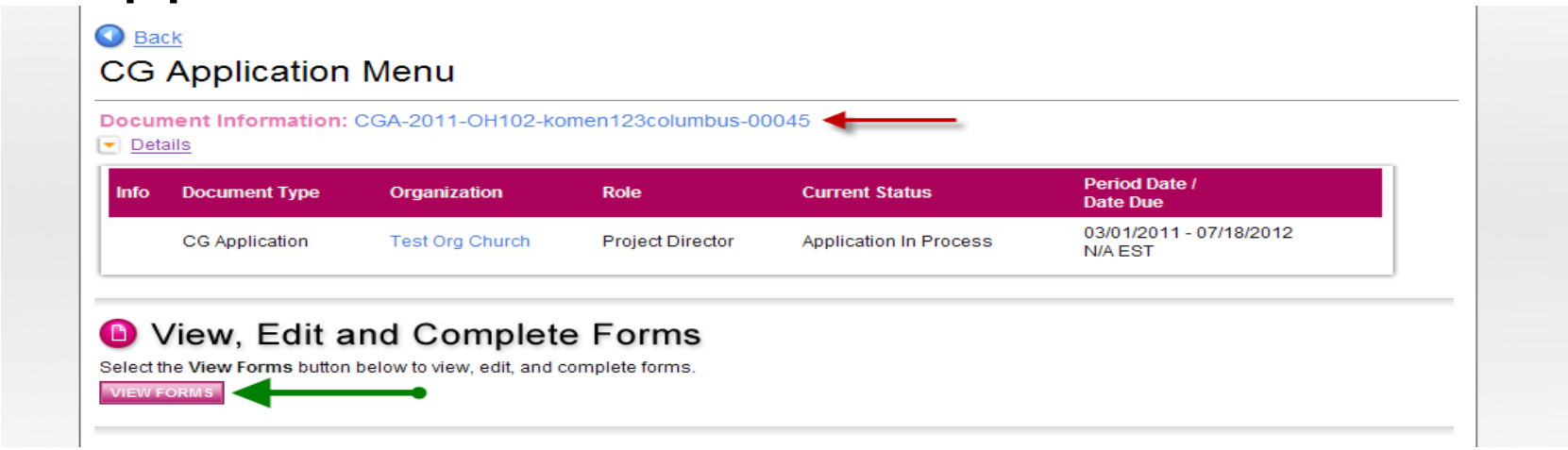
Document Type	Organization	Name	Current Status	Year
CG Application	Test Org Church	CGA-2011-komen123columbus-00016	Application In Process	2011
CG Application	Test Org Church	CGA-2011-OH102-komen123columbus-00023	Application Submitted	2011
CG Application	Test Org Church	CGA-2011-OH102-komen123columbus-00034	Authorized Signature Required	2011
CG Application	Test Org Church	CGA-2011-OH102-komen123columbus-00039	Application In Process	2011
CG Application	Test Org Church	CGA-2011-OH102-komen123columbus-00044	Application In Process	2011
CG Application	Test Org Church	CGA-2011-OH102-komen123columbus-00045	Application In Process	2011

1

Once the search is completed, the applicant will click on the application name they would like to work on.

- **Depending on the amount of detail in the search criteria, the applicant will see a list or just one application.**
- **To work on the application, the applicant must click on the name of the grant application. This will open up the application for further completion.**

Application Process



The information at the top of the page is the applications unique name.

To begin viewing the pieces of the application, the applicant will click View Forms.

- **Now the application is created and ready to be completed.**
- **The information at the top of the page is the application unique name. The system creates the name when the application is created.**
- **To view and complete the application, an applicant must click on the View Forms button.**

Application Process

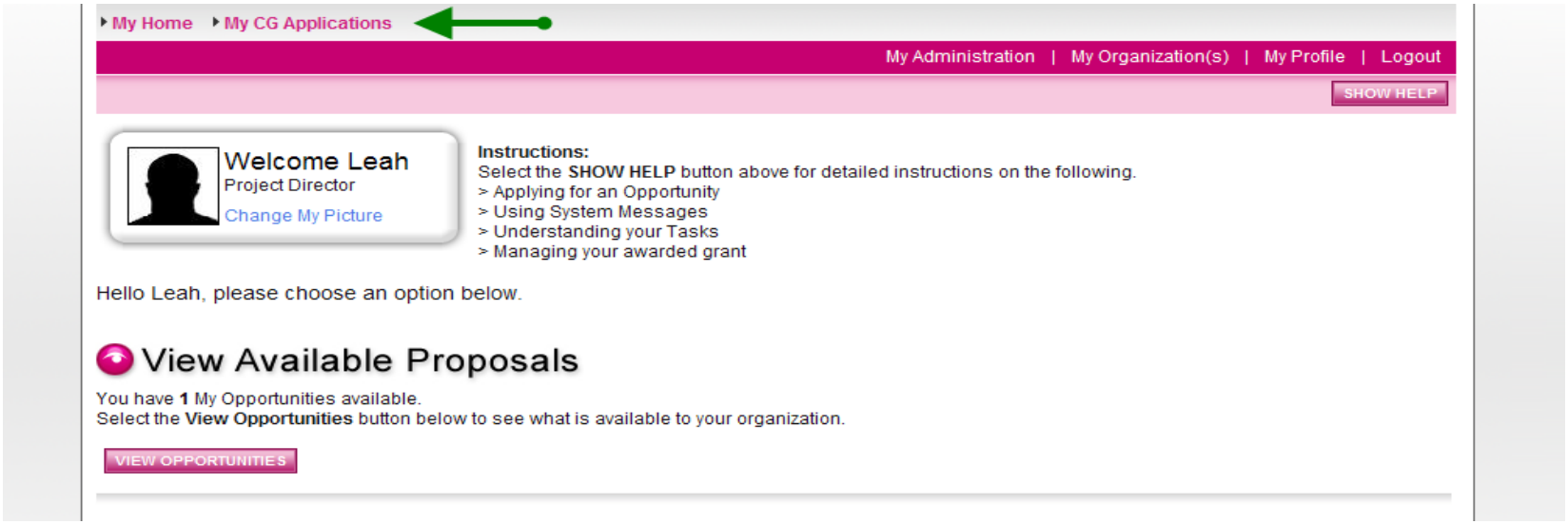
Forms

Status	Page Name	Note	Created By	Last Modified By
	CG Application RFA			
Application				
	Project Profile			
	Organization Summary			
	Project Abstract			
	Project Narrative			
	Project Target Demographics			
	Key Personnel			
	Project Work Plan - Goals			
	Project Work Plan - Objectives			
	Project Work Plan Summary			
	Salaries			
	Consultants			
	Supplies			
	Travel			
	Patient Care			
	Sub-Contracts			
	Other			
	Indirect			
	Project Budget Summary			

The applicant will click on any of the application pieces to begin completing the application.

- **The first sets of forms are specific to the application narrative and the project work plan. All of these pages include required fields.**
- **Once in each section, the applicant will be able to navigate within the sections.**

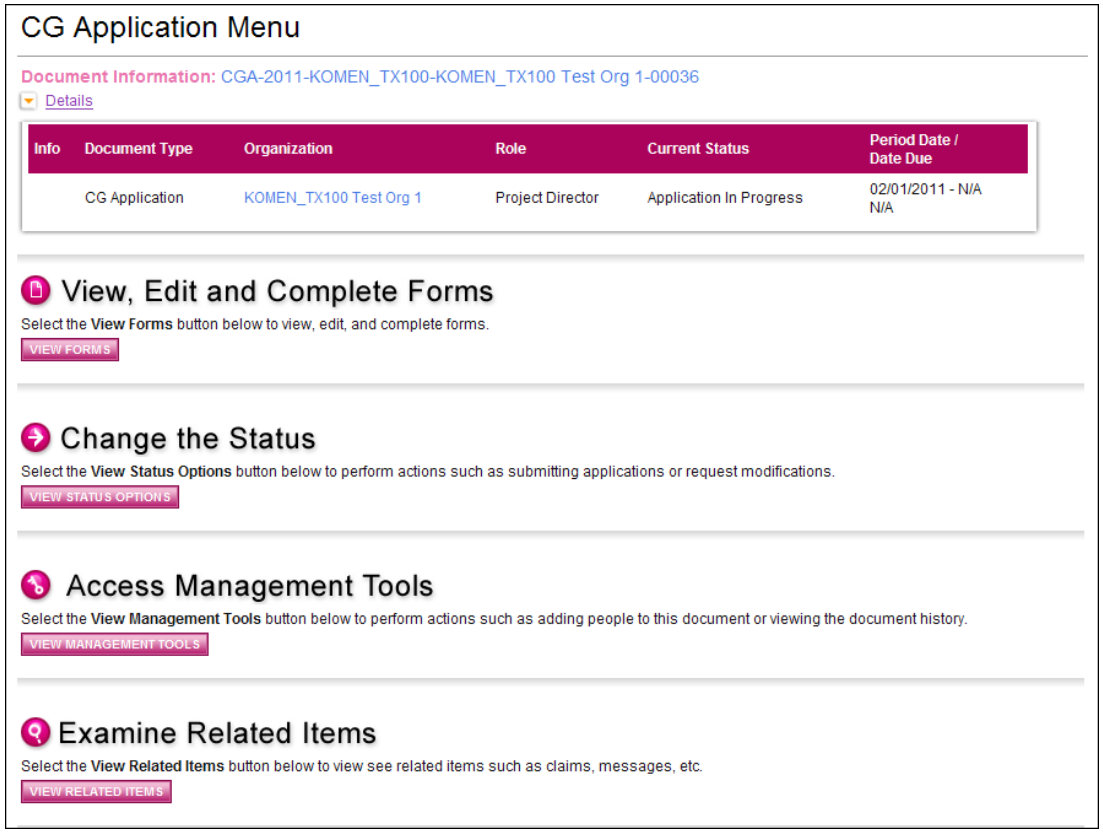
Application Process



An applicant can access their applications by clicking on the My CG Applications tab.

- **Now that the application is created, an applicant can begin working on completing the application.**
- **Once an applicant logs into the system, they can access already created applications through the My CG Applications tab at the top of the page.**

Application Menu



The Application Menu is organized into various sections that help organize the application tasks and information. These sections are displayed and described below.

View, Edit and Complete Forms

The Forms section is where the vast majority of the work in an application is completed. This section contains all of the forms that are necessary to complete prior to the application being submitted. To edit application forms simply click "View Forms" button and then click on the name of the form you wish to edit.

Change the Status

The "Change the Status" section allows a user to change the status of the application or report. Status options are dependent on the current status of the document and the role of the user. Click the "View Status Options" button to see what status push options you currently have available.

Management Tools Section

The Management Tools section allows certain administrative responsibilities such as the ability to add/edit people from the application and view the status history of the application. Functionality is based on your system role.

Related Items (Progress Reports)

The Related Items section is where you will find items that are related to an application or grant. An example of a related item would be a Progress Report.

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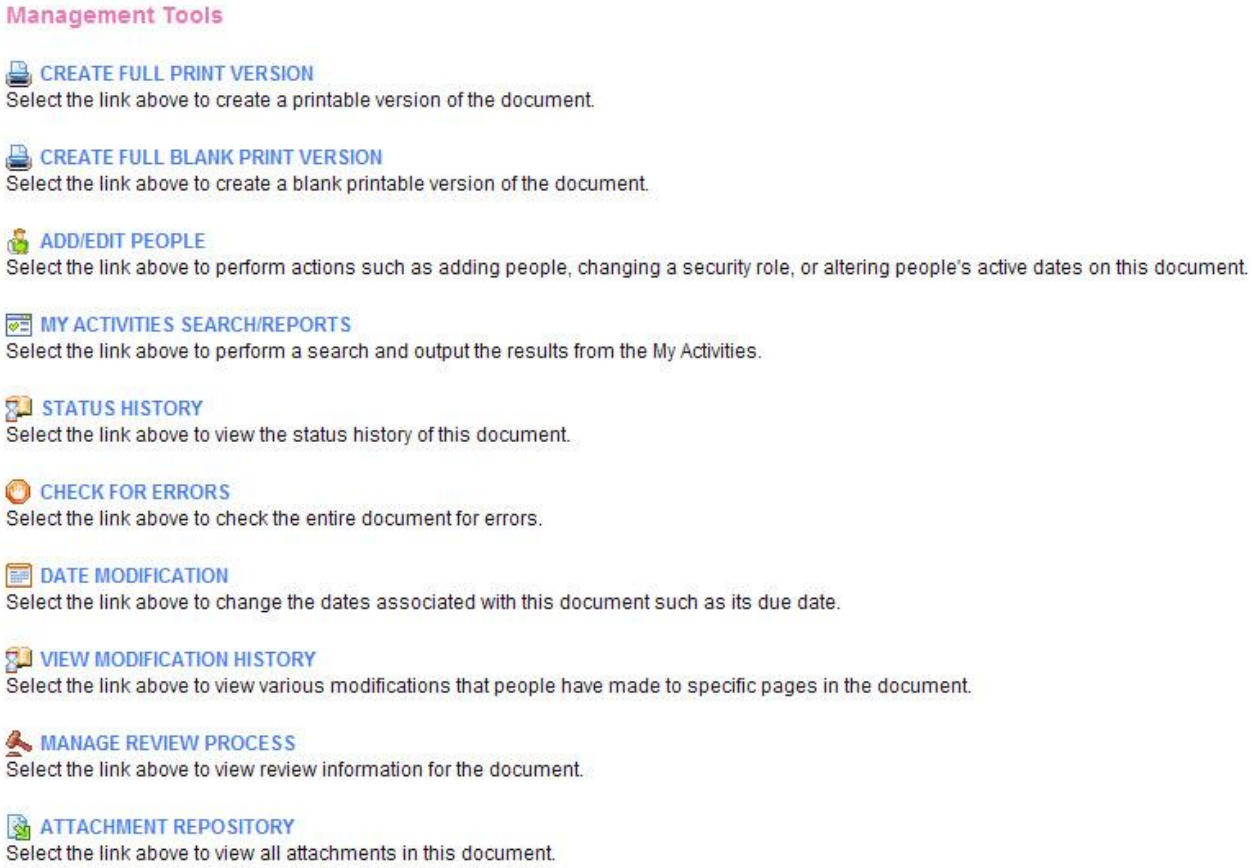
Application Menu



- **Create Full Print Version: Select the link above to create a printable version of the document**
- **Create Full Blank Print Version: Select the link above to create a blank printable version of the document.**
- **Add/Edit People: Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.**
- **My Activities Search/Reports: Select the link above to perform a search and output the results from the My Activities. (Can't be used at the moment)**
- **Status History: Select the link above to view the status history of this document.**
- **Check for Errors: Select the link above to check the entire document for errors.**
- **Date Modification: Select the link above to change the dates associated with this document such as its due date.**
- **View Modification History: Select the link above to view various modifications that people have made to specific pages in the document.**
- **Manage Review Process: Select the link above to view review information for the document.**
- **Attachment Repository: Select the link above to view all attachments in this document.**
- **Related Items <u>(Progress Reports)</u>**
- **The Related Items section is where you will find items that are related to an application or grant. An example of a related item would be <u>a Progress Report.</u>**