

May 2015

Dear Grantee:

We are pleased to announce some changes to our online grants management system. We hope you will find these new features beneficial to completing your online applications and reporting requirements.

In the following pages, you will find instructions for

- 1) *transferring ownership of a grant application or reporting requirement;*
- 2) *managing viewers of an application or requirement; and*
- 3) *sharing online applications and report requirements through email.*

It is important to note that there are two ROLES that your organization's staff will have with regard to the online application and requirements:

**Owner:** *Typically this is the primary grant contact, who will be making the submission.*

*The Owner* has exclusive rights to edit, save or submit an application or requirement.

In addition the owner can:

- transfer each application or requirement to a new owner. *The new owner may choose to accept or decline the transfer. Until this happens, the current owner retains ownership.*
- grant "View-Only" rights to any number of other grantees (staff/people). A read-only version of the application or requirement will be listed on their *My Account* page
- add or remove viewers.
- send an email of the form to the viewers or non-viewers.
- delete an application

**Viewers:** *Typically, these are staff who need to review an application or requirement before it is submitted.*

*A Viewer can:*

- see applications and report requirements owned by others listed in their *My Account* pages.
- view read-only copies until viewing rights are taken away from any of them.
- email the owner and additional email recipients, if desired, as well as attach a copy of the application to the email.

## 1. Transferring Ownership of an Application or Reporting Requirement

The current owner of an Application or Requirement can transfer ownership to another person by selecting the **Transfer to New Owner** icon (shown at right) in the Actions column on the “My Account” page.



The screenshot shows the Mott Philanthropic web interface. At the top, the logo and navigation links are visible. The main content area is titled "Applications" and contains instructions for managing applications. A table lists applications, with the first row showing "2014 Chorus Foundation Short Project Application". The "Action" column for this application contains several icons, including a person with a plus sign, a trash can, and a document. A red arrow points to the person icon, which is labeled "Transfer to new owner" in a tooltip.

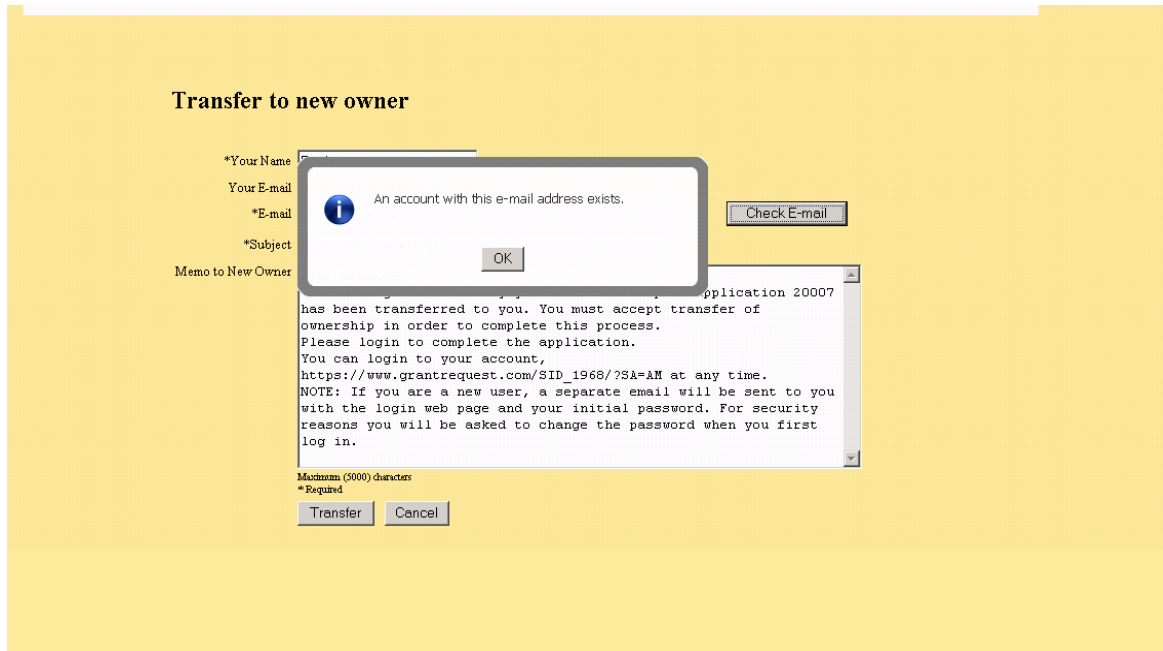
**Step 1:** Enter the email address of the person you would like to transfer ownership to, and select **Check Email** button to see if the account already exists.

**Step 2:** Select **Transfer** to send the transfer request to the new owner.

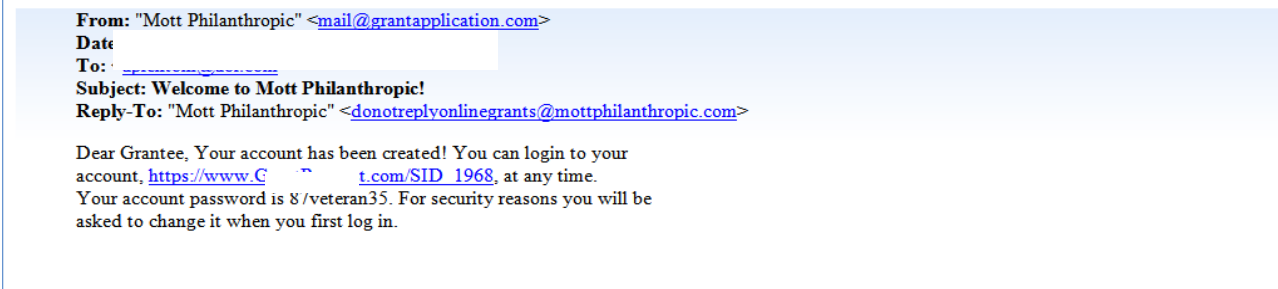
The screenshot shows the "Transfer to new owner" form. It includes fields for "Your Name" (Paula), "Your E-mail" (plentoni@mottphilanthropic.com), "\*E-mail" (plentoni@aol.com), and "\*Subject" (Application Ownership Transfer). There is a "Check E-mail" button. Below these fields is a "Memo to New Owner" text area containing a pre-written message. At the bottom, there are "Transfer" and "Cancel" buttons.

We have provided text that you may personalize.

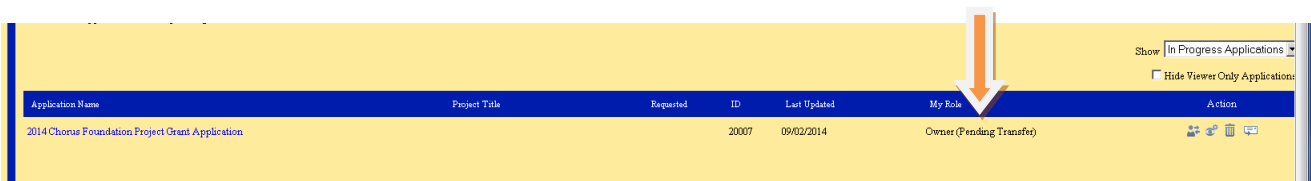
- If the account **exists**, a notification of the ownership transfer will be sent to the new owner



- If the account **does not exist**, a new IGAM account will be created and the notification will be sent to the new owner.



- The current owner retains ownership until the new owner accepts the transfer- *Pending Transfer*.



- If a transfer is pending, and the current owner **selects Transfer a second time**, it will overwrite the first transfer request. The application will be removed from that first owner's My Account page and the process continues to the second requested owner.

The **Save and Finish Later**, **Next/Previous page**, and **Submit** buttons within an application or requirement will validate the ownership. These are *only* available to an owner not a viewer.

The new owner of the application will see the application/requirement listed next time they log in to their My Account page with a ✓ icon (Accept) or X icon (Reject).

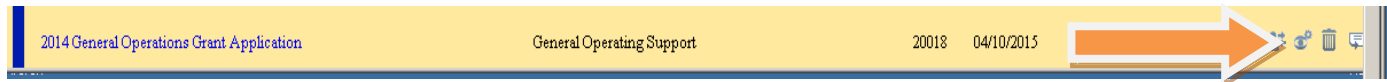
If accepted by the new owner, NO confirmation is displayed. The previous owner becomes a Viewer of the form.

## 2. Managing Viewers

Using the Manage Viewers Interface, the owner of an Application or Reporting Requirement can:

- A. Add new Viewers
- B. See the current Viewers List
- C. Remove people from the Viewers List
- D. Modify the email notice sent to new viewers

Select the Application or Reporting Requirement that you would like to work with.



Select the **Manage Viewers** icon



### Adding New Viewers and Seeing Current Viewers

- Current owners can add additional viewers by entering valid email address(es) and clicking **Add Viewer(s)**. Multiple email addresses must be separated by commas. The new Viewer(s) will be added to the Viewer List at the top with (New) to the right of the email.
- An online account **must** exist for a new viewer to be added, otherwise an error message will be returned.
- **\*\*The applicant must click the UPDATE button to save their changes and send out the notification to the new viewer(s).**

IMPORTANT: Changes are not permanent until you click Update

### Viewers List

\*E-mail

Add Viewer(s)

Current Viewers:

plentoni@aol.com

plentoni@aol.com

Remove

Remove

### E-mail to New Viewers

\*Your Name

Your E-mail plentoni@mottphilanthropic.com

\*Subject Application Viewer Access

Memo to New Viewers

Dear Grantee,  
This message is to notify you that you have been granted Viewer access for Application 20007.  
Please login to view the Application.  
You can login to your account, «Account\_Login\_URL» at any time.

Maximum (2000) characters  
\*Required

We have provided text that you may personalize.

*Transfer of Ownership does not change the status of Viewers*

## Removing Viewers

- Select the check box next to the viewer's email address and select **Remove**
- **NOTE:** There is no notification sent to a Viewer when access is removed.

IMPORTANT: Changes are not permanent until you click Update

**Viewers List**

\*E-mail  Add Viewer(s)

Current Viewers:

plentoni@aol.com (New, New Account will be created)

plentoni@aol.com

Remove

**E-mail to New Viewers**

\*Your Name

Your E-mail

\*Subject

Memo to New Viewers

Dear Grantee,  
This message is to notify you that you have been granted Viewer access for Application 20007.  
Please login to view the Application.  
You can login to your account,  
[https://www.grantrequest.com/SID\\_1968/?SA=AM](https://www.grantrequest.com/SID_1968/?SA=AM) at any time.

Maximum (5000) characters  
\* Required

Update Cancel

The email message to the new viewer may be typed directly into the “Memo to New Viewer” field. We have provided text that you may personalize.

## 3. Sharing Copies of In-Progress Applications

You can email a copy of the application directly to a person, or give them access to view by making them a viewer.

Applications

How are the application links for your organization.

Show Submitted Applications

Hide Viewer Only Applications

Application Name	Project Title	Requested	ID	Submitted	My Role	Action
314 Chorus Foundation Project Grant Application	Test Project Application	5	20007	09/02/2014	Owner (Pending Transfer)	

Click to e-mail a copy of this app

If you would like to share this form for review, please send an e-mail below.

\*Your Name

\*Your E-mail

Send to Viewers

Additional E-mail(s)

To send to multiple e-mail recipients, separate e-mail addresses with comma. A maximum of 10 recipients is allowed.

\*Subject

Message

I would like to share the attached Draft Application with you.

Maximum (5000) characters  
\* Required

Send me a copy

Attach Application

Submit Cancel