

This tutorial will outline the workflow a Staff Evaluator goes through.

Logging In

If you already have an account with the grant making organization;

1. Enter your e-mail address, in the e-mail address field
2. Enter the password you were given by the foundation.
3. Press the “Log On” button to enter the Grant Lifecycle Manager.

If you have forgotten your password;

4. Click the Forgot Your Password link
5. It will then ask for your email address. Type your email address and click Send Reminder.

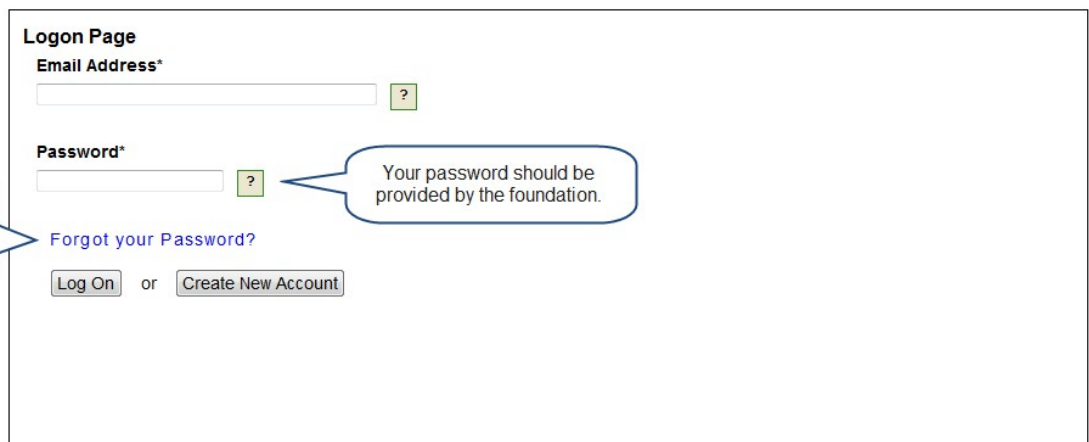
If you do not have an existing account;

6. Contact your Foundation Administrator and they will be able to provide you with these details



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The screenshot shows a web form titled "Logon Page". It contains two input fields: "Email Address*" and "Password*", each with a small green question mark icon to its right. Below the "Password*" field is a blue link that says "Forgot your Password?". At the bottom of the form are two buttons: "Log On" and "Create New Account", separated by the word "or".

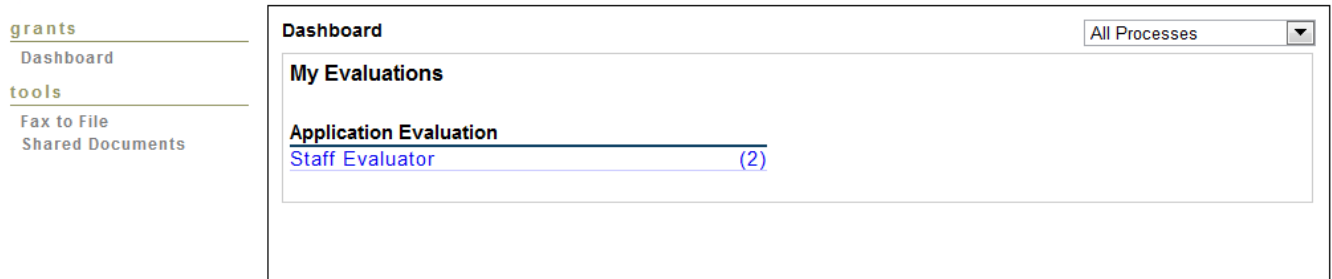
Callout 1 (pointing to the "Forgot your Password?" link): "If you have a password but forgot it, click here."

Callout 2 (pointing to the "Password*" field): "Your password should be provided by the foundation."

STEP 1 Dashboard

After logging into the system, you will be directed to the Dashboard Page. This page displays the number of requests that have been assigned to you and allows you to access the application and evaluation.

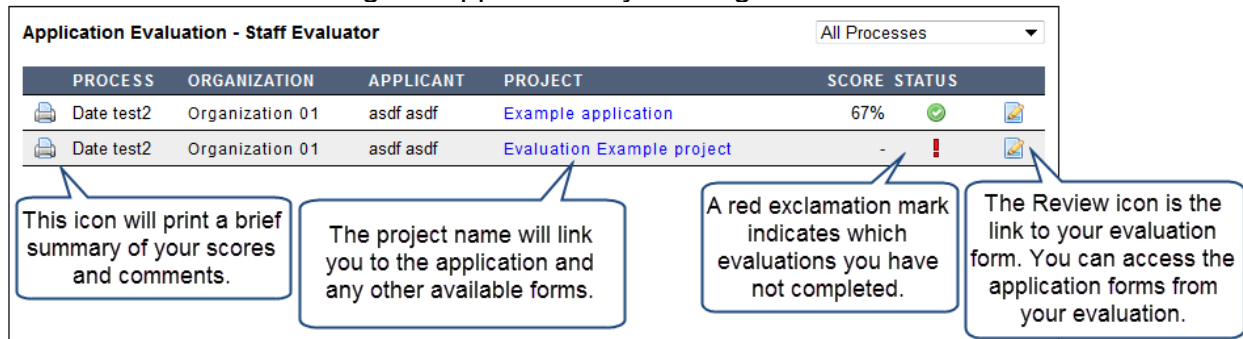
- Click on the “Staff Evaluator” link to review a list of all the pending applications that have been assigned to you for review.







Step 2 Evaluate Assigned Applications

The Evaluation Workload Page displays a listing of the individual applications that have been assigned for you to review.

1. Evaluate each assigned application by clicking on the “Review” icon.



The screenshot shows a table titled 'Application Evaluation - Staff Evaluator' with a dropdown menu for 'All Processes'. The table has columns for PROCESS, ORGANIZATION, APPLICANT, PROJECT, SCORE, and STATUS. Two rows are visible, each with a printer icon on the left and a review icon on the right. Callouts provide explanations for these elements.

PROCESS	ORGANIZATION	APPLICANT	PROJECT	SCORE	STATUS
 Date test2	Organization 01	asdf asdf	Example application	67%	
 Date test2	Organization 01	asdf asdf	Evaluation Example project	-	

Callout 1: This icon will print a brief summary of your scores and comments.

Callout 2: The project name will link you to the application and any other available forms.

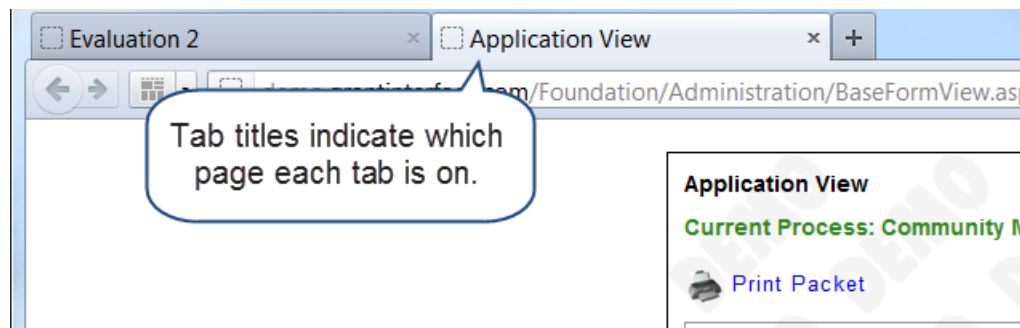
Callout 3: A red exclamation mark indicates which evaluations you have not completed.

Callout 4: The Review icon is the link to your evaluation form. You can access the application forms from your evaluation.

Step 3 Evaluate the Application

The Evaluation page allows you to rank each grant application according to the criteria set forth by your foundation. You are able to document comments and access details of the grant application while performing your evaluation.

1. Rank each evaluation question using the scale provided
2. Enter any comments applicable to this application evaluation
3. Access all forms submitted by the applicant as well as internally generated documents that have been attached by the administrator by clicking links at the top of the evaluation form.



4. After you have completed the ranking questions and enter comments, click on the "Save Evaluation" button.

(See Diagram On Next Page)

- grants
 - Dashboard
- tools
 - Fax to File
 - Shared Documents

Evaluation 1

Current Process: Process 02

* = Required Field

Evaluation Packet

Print Question Legend

Organization: Organization 01 (11-1111111)

Project Name: Evaluation Example project

Contact Information

App 01 01 Last Name
 01 Address 1
 01 Address 2
 01 City, 01 State/Province Postal Code 01 Country
 01 Phone Number
 org01@01.test

Documents

No documents have been added.

Forms: [LOI](#) [Application](#)

Project Name

Enter Project Name

Amount Requested

Amount Requested

Site Visit

Was there a site visit?*

Yes
 No

Date of site visit

Comments

[10000 characters left of 10000]

Rating

Rating*

Rate this program.

N/A 1 2 3 4 5

Amount recommended

What amount of funding do you recommend for this project?

Overall Comments

[10000 characters left of 10000]

Supporting documents provided by the administrator will display here.

Click here to view the application. It will open in a separate window or tab.

Project Name and additional application information is provided in the grey areas.

Answer the evaluation questions. Required questions are marked with an asterisk.

Save will save all of your answers.

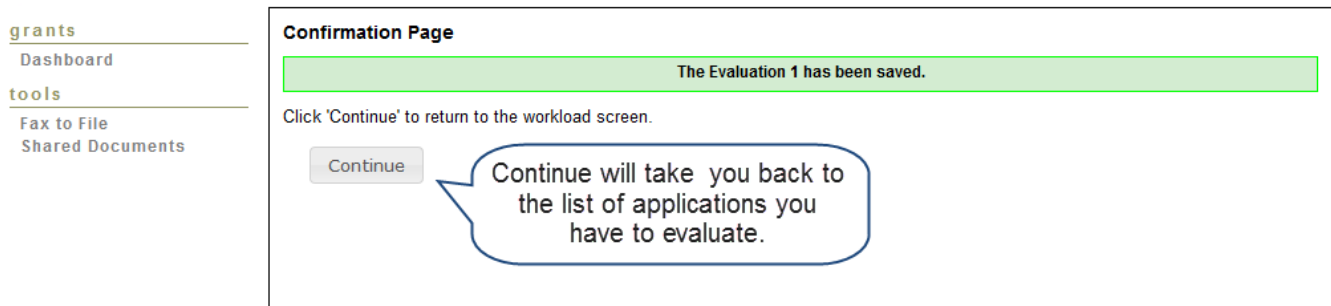
Save

You can resize text areas by dragging the corner.

STEP 4 Confirmation Page

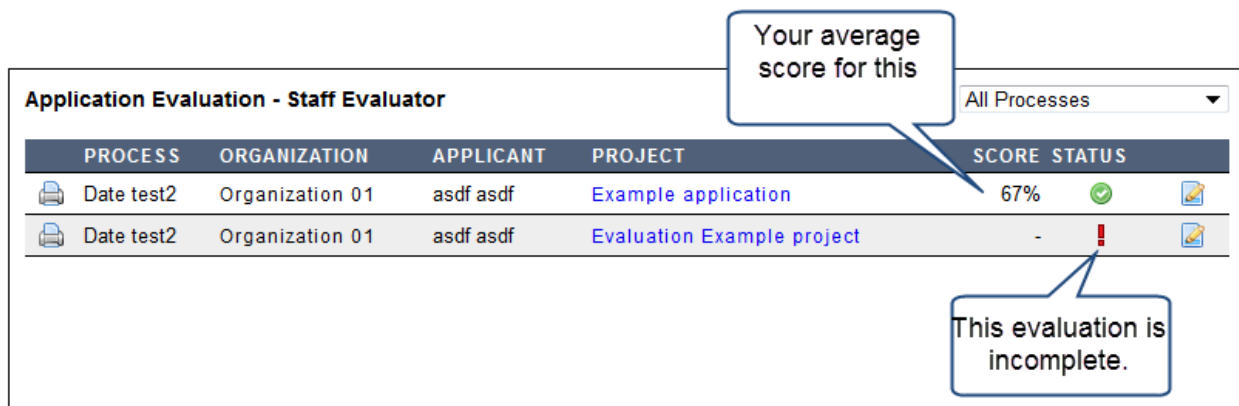
Once you have completed the grant application evaluation, you will be taken to a Confirmation Page. Clicking Continue, returns you to the Evaluation Workload Page where you can select any remaining grant applications that have been assigned to you.

After saving each evaluation, click Continue to return to the Evaluation Workload page.



STEP 5 Review Scoring

1. Your score will appear for each evaluation containing scoring questions that you have completed.
2. A green check mark will appear for each evaluation that you have answered all of the required questions.
3. Continue until all assigned applications have been evaluated. You can edit saved evaluations by simply clicking the Review link and resaving the evaluation form.



Shared Documents

In the Shared Documents area you can view files uploaded by the administrator. Click on Shared Documents under tools to access the files.



Shared Documents
When a search is made, all folders and files with a name or description that matches the criteria are returned.

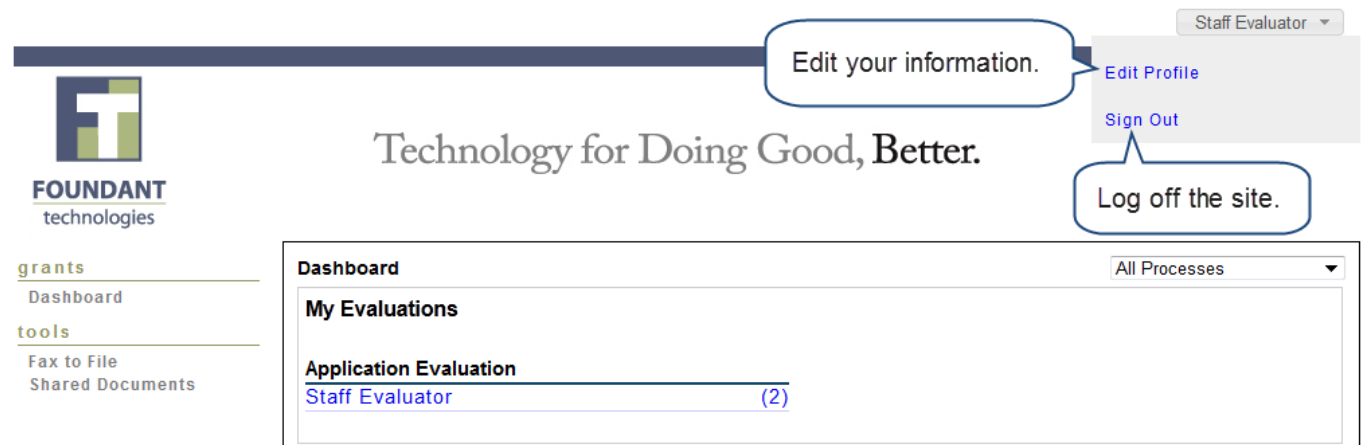
Home Search files and folders by name and description.

TYPE	NAME	DESCRIPTION	CREATED
	Past Meeting Minutes		06/26/2013
	2012 giving report.pdf	Total grants made in 2012 with subtotals by program area.	06/26/2013

Click on the folder or file name to open.

Logging Off

Click on your name to edit your information.
Click the Log Off button in the top right to end your session



Staff Evaluator ▾

Edit your information.

- Edit Profile
- Sign Out

Log off the site.

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grants

- Dashboard

tools

- Fax to File
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Dashboard All Processes ▾

My Evaluations

Application Evaluation

[Staff Evaluator](#) (2)