

Seattle IT

USER GUIDE

City Wide Grants Management System (GMS)- Department of Neighborhood (DON)

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DOCUMENT SPECIFICATIONS

DOCUMENT INFORMATION

Project Name	466 – Citywide Grants Management	
Project Manager	Anne Grant	
OCM Lead	Jasinder Kaur	
Author	Jasinder Kaur	

REVISION HISTORY

Version	Date	Author	Revision Notes	
O.D	09/05/2020	Jasinder Kaur	Initial draft creation.	
1.0	1/7/2020	Jasinder Kaur	Final	

WHAT IS THE INTENT OF THIS DOCUMENT?

This document aims to provide the Applicant with an overview of how to register to Fluxx System and Apply for a Grant.

This is a living document and assigned department resource/s will maintain and update it on a need basis.

WHAT IS INCLUDED IN THE USER GUIDE?

- 1. User Stories that were part of the DON workbook.
- 2. User Guide includes Applicant Role.

WHAT IS NOT INCLUDED IN THE USER GUIDE?

- 1. Payment scenarios.
- 2. Email Alerts
- 3. Amendments.
- 4. Reports.
- 5. Contracts.
- 6. ADO Test Cases.
- 7. Fluxx System Icons.



USER GUIDE: APPLICANT

HOW DOI REGISTER TO THE GRANTS PORTAL?

Step 1-Open the web browser and enter https://seattle.fluxx.io/user_sessions/new and press enter.

Step 2-Clickon the "Create an Account Now."

Welcome to the City of Seattle's Grants Portal				
Login Now:		New to the Grants Portal?		
Username		Create Your Profile		
Password Sign in		In order to be considered for funding, the first step is for you to register with our grant making software. Please click on the "Create an account Now" button below to start.		
Reset or create password		You will not be able to edit your profile after submission, so please ensure you have entered accurate information (including email address) when completing the registration form.		
		After submitting the registration form, you will receive an email notification from City of Seath with login information and steps to set your password. This will give you access to the Grantee portal and our application forms. Should your funding application be successful, this portal will also give you access to submitting invices & reporting emplates.		
		Create an account now		
	S FLUXX			
	Privacy Policy Accessibil	ity		

Step 3 -On the registration form, fill out all the information.	
	Seattle
	Welcome to the City of Seattle's Grants Portal Items marked with * and bolded are required for submission.
	Primary Contact Info
	* First Name
	* Last Name
	* E-mail
	Mobile Phone Number
	Mailing Address
	Mailing Address 2
	City
	Country
	United States ~ State/Province
	> Postal Code (Zip)
	Cancel Submit Request
	FLUXX Privacy Policy Accessibility
Submit Request	
Step 4-Clickon the "Submit Request" button.	



Step 5- Message is displayed after submitting the registration form.



Step 6-Login to the email you provided in the registration form and verify the link provided in the email.

Please verify your account 🔉 Inbox x	
City of Seattle do-not-reply.grants07-us-east-1@fluxx.io <u>via</u> amazonses.com	
Thank you for creating an account on City of Seattle's Grants Portal.	
Please click the below URL to verify your account. After you have verified your account, you will receive another email wi	here you can set your password:
Verification Link: https://seattle.fluxx.io/verify/4739c329584ab17a9dcbbc4c51ff1087	
To Grants Portal: <u>https://seattle.fluxx.io</u> To City of Seattle: <u>https://seattle.gov</u>	

Step 7-You will be asked to enter the password.

	SET YOUR PAS	SWORD		
	New password			
	Confirm new password	1		
	Cancel			
Set Password and Log in				



Step 8- Once the password is set, you will be navigated to Grantee Portal.

() Seattle	Seattle		
	Welcome to the Grantee Portall		
<u>ې</u> الله	Prove this surfaces area one		
COMMICS	 Section as expression with the section 		
Constant Dated	Tank the status of your penaling program Information programment Information programment		
Apply for Funding	Review (our current grants and report due dates Review (our current grants and report due dates		
Seattle Information Technology	Monitor grant payments		
Raimbursoment Information			
NSANIZATIONE / COMMUNITY	HOW TO USE THE PORTAL		
NULING My Accountia)	The icons on the left-hand side are called "cards". When you click on the link beneath each card, you are access the following:		
EOPLE (1)	REGULETS		
A/ Perfie (1)	Panding Requests		
	Once you have submitted a proposal, you can find a read-only version here.		
PLICATIONS 👻	 Request to EXI: One was been indexton scheduling encount the exclusion is assistable via this link. If the staff have any constraints after your representation when the exclusion of the exclusion. 		
Panding Requests	you will receive an email altert to login. You can find the proposal here, available for editing		
Inquinitie the Edit	 Submitted 		
Submitted Requests	Once you have submitted your proposal appears in the Submitted Requests link.		
Annandet Howelsone	 Contract Hereisons Contract to us a chimmed your control and annexis in the Submitted Replaced Link 		
BANTS / CONTRACTS 🚽			
Active	GRANTS		
Olissod	 Activa 		
	Atter the stall has indevised the countersupred agreement, you can find a read-only variable here via this brit.		
	 Closed When the part is complete and all permitted and expertational automatic sources to care for the closed counts tree. 		
Ioverw Requested			
etoner.	PROGRESS REPORTS		
ROGREGE REPORTS -	Reports Due		
Reports Due	reports po de submittel for al active grants appear new unit you have submitted them, nou test nextensions as the due date approaches.		
Roports to Lidit	Statement reports One you have submitted a vector, you can find a react-only version have.		
hatevelowd			
-	PROMENTS		
	Schecking		
advilled	Schoduled payments for all of your active grants appear here until they are paid.		
	 Hallo Once a payment has been made, the record of the payment appears here. 		
FLUXX 🏟			

Step 9- You will also receive an email from City of Seattle for "New User Information."

	New User Information > Inbox ×
:	City of Seattle do-not-reply.grants07-us-east-1@fluxx.io <u>via</u> amazonses.com
	Dear test,
	You now have an account with City of Seattle's Grants Portal!
	You have been assigned the user name: Granteetest@gmail.com These credentials allow you to login at https://seattle.fluxx.io.
	Thank you City of Seattle
	If you need to set a password please follow this link: https://seattle.fluxx.io/token/89ca6dcbf3da0ff5a56d7b68fee04bd09bd366ab5f69f657e4



Step 10- Login to the https://seattle.fluxx.io/ and enter the user name and password.



HOW TO RESET LOGIN AND PASSWORD?

Step 1-Open the web browser and enter https://seattle.fluxx.io/user_sessions/new and press enter.

Step 2-Clickon "Reset or Create Password."

Welcome to the City	Welcome to the City of Seattle's Grants Portal		
Login Now:	New to the Grants Portal?		
Usemame	Create Your Profile		
Password Sign in	In order to be considered for funding, the first step is for you to register with our grant making software. Please click on the "Create an account Now" button below to start.		
Reset or create password	You will not be able to edit your profile after submission, so please ensure you have entered accurate information (including email address) when completing the registration form.		
	After submitting the registration form, you will receive an email notification from City of Seattle with login information and steps to set your password. This will give you access to the Grantee portal and our application forms. Should your funding application be successful, this portal will also give you access to submitting invices & reporting templates.		
	Create an account now		
Privacy I	Policy Accessibility		



Step 3-Enter the registered email and Click on Submit.



Step 4-The message window is displayed.



Step 5-Login to the registered email and click on the link sent.

Password	d Reset 🔎 Inbox ×
City of Seattle	e do-not-reply.grants07-us-east-1@fluxx.io <u>via</u> amazonses.com
Here's a link to	reset your password https://seattle.fluxx.io/reset_password/BLR6VIp51PsgOJJbPS0V
Your login is test2@gma	<u>ail.com</u>



HOW DO I APPLY FOR A GRANT?

Step 1-Open the web browser and enter https://seattle.fluxx.io/user_sessions/new and press enter.

Step 2-On the Login Page, enter the login credentials.

Welcome to the City of Seattle's Grants Portal			
Login Now:		New to the Grants Portal?	
Usemame		Create Your Profile	
Password Sign in		In order to be considered for funding, the first step is for you to register with our grant making software. Please click on the "Create an account Now" button below to start.	
Reset or create password		You will not be able to edit your profile after submission, so please ensure you have entered accurate information (including email address) when completing the registration form.	
		After submitting the registration form, you will receive an email notification from City of Seattle with login information and steps to set your password. This will give you access to the Graniee portal and our application forms. Should your funding application be successful, this portal will also give you access to submitting invices & reporting temptales.	
	ELLIVY	Create an account now	
	Privacy Policy Accessibility		

Step 3-Click on "Apply for Funding" from Information section.

Seattle Seattle	
Grantee Portal Apply for Funding	
Seattle Information Technology	



Step 4-Click on "Apply for CPF Funding" or "Apply for Small Sparks Funding"

	Apply for Funding from the City of Seattle
Department of Neighborho Description, Eligibility, Additiona • Text Description	ds Information, and Application Linka
	Apply for CPF Funding Apply for Small Sparks Funding

Step 5-Fill out the form.

Note: fields that are in "Bold" text are required fields.

epartment of Neighborhoods: Community Partnership Fund Application				
Project Title:				
ID: DON P-202011-02 Contract Number:	2170	Project Manager:		
Start Date:		Amount Requested:		
End Date:		Community Match Total:		
P <mark>lease note:</mark> The be lost.	portal does not autosave	; therefore, you must click the [Save] button to ensure your data will no		
		Your application is in progress.		
You can save and v	vork on the application up until you su	ubmit. Submitting for Preliminary Review will allow the Project Manager to review and send back. Once		
	you submit fo	or Final Review, the application can no longer be adjusted.		
Full Application				
Project Readiness (50 Work Plan Budget Expenses Project Match Documents	auon Therships (50 Points) Points)			
■ Social Sponsor Inform Builds Community Pa Project Readiness (50 Work Plan Budget Expenses Project Match Documents ▼ Organization/C	auon Points) Points) ommunity Group Informatio	n		
Index opposition moting Index opposition moting Index opposite Index op	Points) Points) Ommunity Group Informatio	n Add New		
India community Pa Builds Community Pa Project Readiness (60 Work Plan Budget Expenses Project Match Documents ✓ Organization/C Organization / Community Group Location	ommunity Group Informatio	n Add New		
Index opposed intol Index opposed intol Project Readiness (60 Work Plan Budget Expenses Project Match Documents ✓ Organization/C Organization / Community Group Location	Interstiguide UG	n Add New		
Index opposition moting Index opposition moting Index opposition moting Index opposite	ommunity Group Informatio Dontestguide Dontestguide - headquarters TestGrantee UG TestGrantee UG	Add New		

Step 6-Click on Save and Continue

, it will save your application and you can continue entering

the data. Note: Application is not auto saved.



Step 7-Once application is complete, click on Save and Close Button.

Step 8-

- For Final Review- Verify the application and click on "Submit Final Application"
 Submit Final Application
- For Preliminary Review click on "Submit for Preliminary Review".

Department of Neighborhoods: Community Partn	ship Fund Application		
Project Title: TestDon			
ID: DON P-202011-02170 Contract Number:	Project Managers		
Start Date: November 18, 2020	Amount Requested: \$8,000.00		
End Dates January 5, 2021	Community Match Total: \$6,000.00		
You can save and work on the application up until as	Your application is in progress. ou submit. Submitting for Pheliminary Review will allow the Project Manager to revi mit for Ihial Review, the application can no longer be adjusted.	ew and send back. Once you	
Status	Application in Progress		
Table of Contents			
Facal sponsor information Builds Community Partinetrihos (50 Points) Project Readinase (50 Points) Work Pan Budget Expenses Project Match Documents			
 Organization/Community Group Info 	mation		
Organization / Community Group:	Domestguide		
Add new contacts:			
Applicant Contact			
Name:	TestGrantee UG		
Email Address:	UG@gmail.com		
Phone Number:			
Applicant Signatory			
Namo:	TestGrantee UG		
Email Address:	UG@gmail.com		
Observ Mumber			

Save And Close

Step 9-The note dialog is displayed, if required enter the comments and click ok button.

Note for Submit Final Application		Х
	Cancel	ОК

Step 10- Once the application is submitted, it will be listed under the "Submitted Requests" tab. The application status will be "Application in Review".





Step 1-Open the web browser and enter https://seattle.fluxx.io/user_sessions/new and press enter.

Step 2-On the Login Page, enter the login credentials.



Step 3-Click on the "Requests to Edit" tab from the applications.



Step 4-The application that requires edit will be listed and has a status of "Revision Requested".



Step 5-Click on the application and the application form will be displayed. The "Note to Applicant/Grantee" section will display the request from the Grant Project Manager.



Department of Neighborhoods: Community Partners	ship Fund Application
Project Title: TestDon	
ID: DON P-202011-02170 Contract Number:	Project Manager:
Start Date: November 18, 2020	Amount Requested: \$6,000.00
End Date: January 5, 2021	Community Match Total: \$8,000.00
	Your application has been sent back
	Tour application has been sent back.
City of Seattle Department of	Neighborhoods has requested you make the following adjustments to your application.
	Note to Applicant/Grantee:
	Please add the supporting documents.
,	
Status	Revisions Requested
 Table of Contents 	
Organization/Community Group Information	
organization community choup information	
Full Application	
Full Application Fiscal Sponsor Information Builds Community Pattorships (50 Points)	
Full Application Fiscal Sponsor Information Builds Community Partnerships (50 Points) Project Readiness (50 Points)	
Full Application Fiscal Sponsor Information Builds Community Partnerships (50 Points) Project Readiness (50 Points) Work Plan	
Full Application Fiscal Sponsor Information Builds Community Partnerships (50 Points) Project Readiness (50 Points) Work Plan Budget Expenses Project March	

Step 6-To enable the application to edit, click on the edit button edit mode.

Step 7-Make the required changes, Click on Save and Close button.

Stop 9 Clickon "Submit" hutton	Submit
Step o-Chekon Submit Dutton.	

HOW CAN I REVIEW THE TERMS OF THE CONTRACT AND REQUEST CHANGES?

Step 1- Open the web browser and enter https://seattle.fluxx.io/user_sessions/new and press enter.

Step 2-On the Login Page, enter the login credentials.

	Seattle
Welcor	me to the City of Seattle's Grants Portal
Login Now:	New to the Grants Portal?
Username	Create Your Profile
Password	In order to be considered for funding, the first step is for you to register with our grant making software.
Sign in	Please click on the "Create an account Now" button below to start.
Reset or create password	You will not be able to edit your profile after submission, so please ensure you have entered accurate information (incluring enail address) when



Step 3-Clickon the "Contract Revisions."







Step 5-Clickon the Edit

and the application edit mode is displayed.

Save And Close

Step 6-Review the application and update it as desired.

Edit

Step 7-Click on Save and Close button.



Submit

Step 8-Clickon "Submit button.

Step 9-The Note window is displayed. Click Ok. *Entering comments is optional*.

Note for Submit	X
1	
	Cancel OK

Step 11- Application is submitted and moved to "Submitted Requests" and the status is changed to "Application in Review".

HOW DO I ATTACH DOCUMENTS TO THE APPLICATION?

Step 1- Open the web browser and enter https://seattle.fluxx.io/user_sessions/new and pressenter.

Step 2-On the Login Page, enter the login credentials.

Seattle			
Ра	Welcome to	the City of Seattle's Grants Portal	
	Login Now:	New to the Grants Portal?	
	Usemame	Create Your Profile	
	Password	In order to be considered for funding, the first step is for you to register with our grant making software. Please click on the "Create an account Now" button before to etable.	



Step 3-Open the application. User can upload the document at the following stages

- 1) When the application has "Application in Progress "status
- 2) When the application has" Revisions Requested" status
- 3) When the application has "Contract Revisions" status

Step 5-Click on the Edit and the application edit mode is displayed.

Step 6-Navigate to the Document Section of the application.

a) Upload the document by clicking on + symbol.

ease note this application requires a princip	pal letter of support.	
Principal Letter of Support needs to show the	Principal's awareness and support of the identified Mini Grant funded project.	
letter of Support		\odot
	Request Documents	\odot
	Organization Documents	Đ

b) The Upload Files window is displayed.

Upload files Select or drag files then start upload		Х
Filename	Size	Status
Drag files here.		4
Add files Start upload		



- c) Click on "Add Files" button.
- d) Your local explorer will be displayed.

🗯 > This PC >	Documents >
New folder	
City of Seattle	Name ^
	20200806-Webex Poll Testing(1688681983865
	Custom Office Templates

- e) Select and upload the file.
- f) Click on "Start Upload"
- g) Once the upload is completed. Click on "X" and the upload files window will be closed.

Start upload

		Size
Document2.pdf	W-9	114 KB 100

HOW DOI DOWNLOAD/SAVE A COPY OF MY APPLICATION TO MY LOCAL MACHINE?

Step 1-Open the web browser and enter https://seattle.fluxx.io/user_sessions/new and press enter.

Step 2-On the Login Page, enter the login credentials.

(Seattle
Pa Welcome to	the City of Seattle's Grants Portal
Login Now:	New to the Grants Portal?
Username	Create Your Profile
Password	In order to be considered for funding, the first step is for you to register with our grant making software



Step 3-Open the application. Click on the isotron to download or save the application. The application will open in the default browser view. Save it as desired.