

ZOOMGRANTS TUTORIAL

Applying for EMSWCD Partners in Conservation (PIC) Grants

Instructions for ZoomGrants

ZoomGrants is an online tool that helps facilitate grant applications, committee review and grant management that we believe will help streamline the process for applicants and review committee members. Below you will find instructions with screenshots to help you navigate the system. As always, we are open to feedback and questions, please don't hesitate to contact us.

Accessing ZoomGrants

To use ZoomGrants to submit your application, you **must** start on our EMSWCD ZoomGrants page:

<https://zoomgrants.com/gprop.asp?donorid=2245>

The screenshot shows the ZoomGrants interface for the East Multnomah Soil and Water Conservation District. At the top left is the district's logo. The main content area is divided into two columns. The left column, titled 'East Multnomah Soil and Water Conservation District', contains a 'How do I do this?' link and an 'Open Programs' section. Under 'Open Programs', there is a card for 'Partners in Conservation' (Conservation Legacy 12/15/2016 - Organizations Only) with 'Apply' and 'Preview' buttons. The right column, titled 'New ZoomGrants™ Account', contains a form with fields for Email, Password, First Name, and Last Name. Below these fields is a radio button for 'Organization' and a 'New Account' button. A message at the top of the right column states 'You must be logged in to apply.' Below the form, there are two bullet points: 'Password must be 8-16 characters and contain at least 1 letter and 1 number.' and 'We do not sell or rent your personal information to anyone. Ever.'

There, you'll **set up your account** and **start your application**. (If you already have an organizational account for ZoomGrants use your existing username and password). After you've created your account and application, you can access your application by continuing to follow the link above during the application period or by logging in on the ZoomGrants homepage – <https://www.ZoomGrants.com/login>.

Browser Compatibility

ZoomGrants works best on **Chrome**, **Firefox**, or **Safari** browsers. If you are using Internet Explorer, it works best with version 11 or higher.

Do you have questions about ZoomGrants?

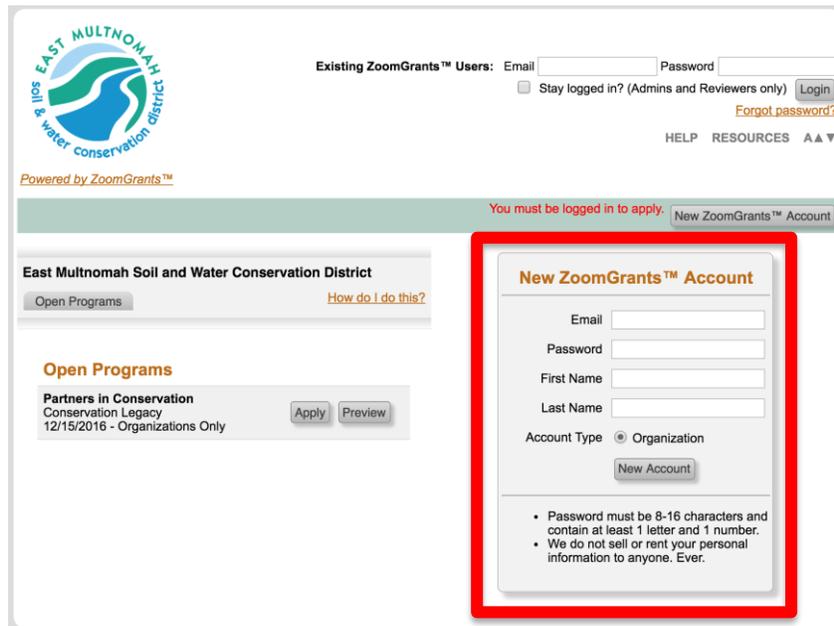
Use the **Help** button at the top of the page for access to helpful resources and information. You can also click the ‘ZoomGrants University’ button or visit <https://zoomgrants.zendesk.com/hc/en-us/categories/202479098-Applicants> for more information from ZoomGrants. If you have technical questions about the system, contact the Help Desk at (866)323-5404 x2 or Questions@ZoomGrants.com

To ensure that you are receiving emails about your grant, please add to your “safe senders list” the email address Notices@zoomgrants.com.

Creating Your Account

To submit your application through ZoomGrants, you’ll need to have an **account**. You will create your account on our EMSWCD ZoomGrants page:

<https://zoomgrants.com/gprop.asp?donorid=2245&limited=1220>



The screenshot shows the ZoomGrants website interface. At the top left is the logo for the East Multnomah Soil and Water Conservation District. The main navigation bar includes 'Existing ZoomGrants™ Users:' with fields for 'Email' and 'Password', a 'Login' button, and a 'Stay logged in? (Admins and Reviewers only)' checkbox. There is also a 'Forgot password?' link and 'HELP RESOURCES' links. A green banner across the top states 'You must be logged in to apply.' and includes a 'New ZoomGrants™ Account' button. The main content area is divided into two sections. The left section, titled 'East Multnomah Soil and Water Conservation District', has an 'Open Programs' button and a link 'How do I do this?'. Below this is an 'Open Programs' section with a 'Partners in Conservation' program listed as 'Conservation Legacy 12/15/2016 - Organizations Only', with 'Apply' and 'Preview' buttons. The right section, titled 'New ZoomGrants™ Account', is highlighted with a red box and contains the following fields: 'Email', 'Password', 'First Name', and 'Last Name'. Below these is an 'Account Type' section with a radio button selected for 'Organization' and a 'New Account' button. At the bottom of this section, there are two bullet points: 'Password must be 8-16 characters and contain at least 1 letter and 1 number.' and 'We do not sell or rent your personal information to anyone. Ever.'

To set up your account, enter an **email address, password**, and your **first and last name** in the New ZoomGrants Account box on the right side of the screen. Click the ‘New Account’ button to create your account and log in.

In ZoomGrants, each organization should have *one* account in which all of their applications are kept, so give some thought to what email address you should use to set up your account. Here are two things to consider:

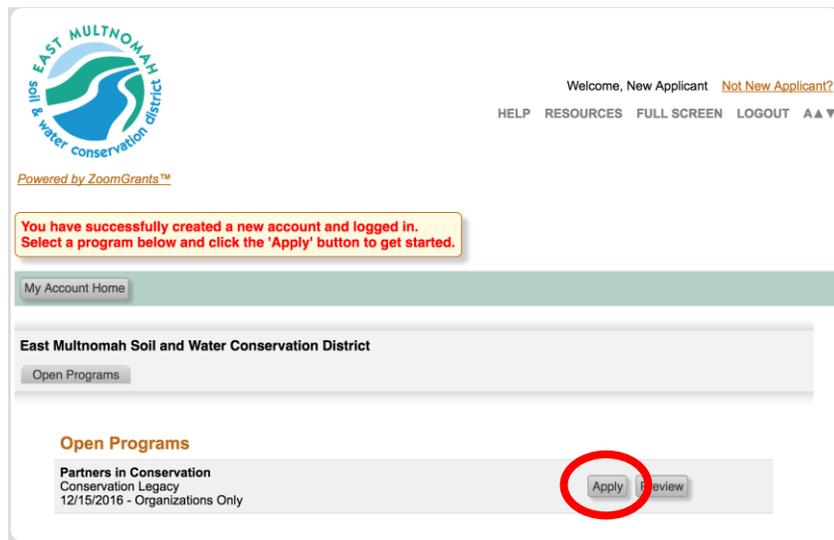
1. If there is ONE PERSON who is primarily responsible for submitting and managing your organization’s application, that is the person whose email address should be on the account.

2. If there are MULTIPLE PEOPLE who need equal access to your account to submit and manage applications, consider using a universal email and password for your organization, which may be used for future grant applications.

Once you've created your ZoomGrants account, you can invite other users to work on specific applications. Keep in mind that you'll be able to use the same ZoomGrants account to submit other applications in the future.

Starting Your Application

After you've set up your account, click the 'Apply' button:



Saving your work

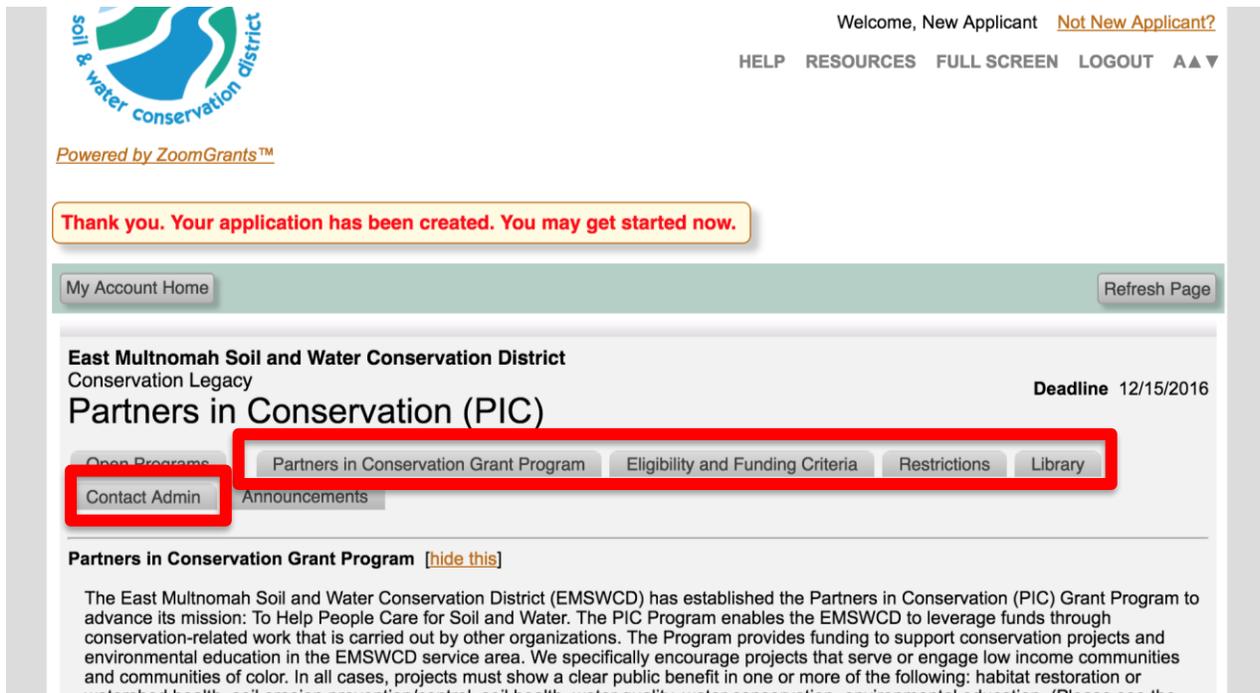
ZoomGrants has an **auto-save feature** that saves your changes whenever you make a change in an answer – type into a text box, make a selection in a multiple-choice or checkbox question, or enter a number in a table field – then click outside of that field. You may notice a small flash on your screen when you do this. That is the system saving what you entered. There are no save buttons.

There are some pages where you may not see items automatically update, in this case you may need to use the 'Refresh Page' button in ZoomGrants at the top of the application pages. ZoomGrants may also prompt you to do this.

Navigating the Application

ZoomGrants uses a tab system to separate out different sections of the application. The tabs at the top of the page are **program information tabs**. Click on the tabs to show or hide that section of information. You can refer to the information in these tabs at any time.

Click the 'Contact Admin' tab in this top row of tabs to open your email client to send an email to the program administrator.



Beneath the row of program information tabs is the row of **application content** tabs. Each of these tabs houses a different section of the application.

There are five application content tabs:

1. Project Summary
2. Application Questions
3. Budget
4. Project Work Plan
5. Documents

Click on the tabs to jump to that section, or use the 'Next' and 'Previous' buttons at the bottom of each tab to move sequentially through the application.

East Multnomah Soil and Water Conservation District
Grants Program

Deadline 12/15/2016

Partners in Conservation (PIC)

Open Programs | Partners in Conservation Grant Program | Eligibility and Funding Criteria | Restrictions | Library

Contact Admin | Announcements

Application Status: Not Submitted

\$ 0.00 requested

Submit Now | Print/Preview

Activity Log

Project Summary | Application Questions | Budget | Project Work Plan | Documents

Project Summary (answers are saved automatically when you move to another field)

Instructions [Show/Hide](#)

- 1). The "Applicant Information" should be that of the Project Manager or Primary Contact for the application/project.
- 2). Include the location address of your organization in Address 1. If you have a separate mailing address, please include that in Address 2.
- 3). If you have additional staff you would like to involve in the application, you can invite them into the application for editing as a Collaborator - see the ZoomGrants Tutorial in the Library tab.

Name of Project

Amount Requested
PIC: \$5,000 - \$80,000 PIC Plus: \$5,000 e

APPLICATION PAGES

Project Summary Tab

In the first tab of the application, the **Project Summary** tab, you'll be asked to provide basic contact information for the account owner (the applicant) and for your organization.

Inviting Another User to Work on an Application

The **Project Summary** tab is also where you can **add other users** to work on the application via their own accounts. These other users are called **collaborators**. To invite someone else to access the application as a collaborator, scroll down in the Project Summary tab to the Collaborators section:

Collaborators

Collaborators can only edit application data (answers). They cannot submit, archive, or delete this application.

Email Address	Editing Access	Status
Application		
<input type="text" value="Email Address"/>	<input type="checkbox"/>	<input type="button" value="Invite"/>

Add to Additional Contacts (below)

Additional Contacts for this Application
 Additional Contacts will be copied on all emails sent to the application owner regarding this application. Enter ONLY email addresses separated by a comma. No names. No titles. No phone numbers.

You will add collaborators one at a time.

1. Enter one person's complete email address in the 'Email Address' field.
2. Check the box to give them access to the application.
3. Click the 'Invite' button to send an email invitation to that new user.

They will receive an email invitation. If they already have a ZoomGrants account, they can log in at <http://ZoomGrants.com/Invitations.asp> using their normal email address and password. If they do not have a ZoomGrants account, they will be given a temporary password that they can use to set up their account.

NOTE: Only the application owner can submit, archive, or delete an application; edit the Applicant and Organization Information fields in the application; or manage collaborators' access. Collaborators cannot do any of those things. If your application is approved and you are asked to submit reports or invoices later, the application owner will need to update your collaborators' access, if you want them to work on or submit those components.

You can also add **Additional Contacts** to each application by entering their email address in the Additional Contacts box. You can add more than one person here, just put a comma between the email addresses. Additional contacts receive email notifications regarding this application but cannot access the application via their own account unless you also add them as a collaborator.

ZoomGrants provides more information about collaborators and additional contacts here:

<https://zoomgrants.zendesk.com/hc/en-us/articles/215360518-How-can-I-invite-another-user-to-work-on-my-application-or-add-someone-else-to-our-account->

If you'd rather everyone access your application(s) via a single account, you may also continue to use one login and password.

Application Questions Tab

Project Summary **Application Questions** Budget Project Work Plan Documents Activity Log

Application Questions (answers are saved automatically when you move to another field)

Instructions [Show/Hide](#)

Please read the questions carefully and answer with the best available information you have at this time. All questions must be completed. If the questions does not apply to you, write N/A.

Organization Background

1. Has your organization applied for a PIC grant previously?

Yes
 No

2. Briefly describe your organization.
Include your mission, primary programs and constituents.

The **Application Questions** tab houses many of the application questions. You must provide an answer for **every** question that you see in that tab, so be sure that you've answered everything. Remember that ZoomGrants automatically saves your progress, so you as soon as you click outside the box and see the 'Saving' screen flash, then disappear, your change has been saved.

A couple of things to keep in mind as you work on the application questions:

1. ZoomGrants saves **unformatted text only**. If you are copying and pasting from another location, please remove all formatting – bolds, italics, numbered lists, bullets, etc. – before pasting your answer.
If you have trouble getting an answer to save, please refer to this information from ZoomGrants: <https://zoomgrants.zendesk.com/hc/en-us/articles/230159947-The-Saving-screen-is-still-flashing-now-what->
2. Text questions have **character limits**. ZoomGrants counts anything that takes up space in a text box as a character, including letters, numbers, spaces, carriage returns, symbols, etc. If you are copying and pasting from another location, the character count in your document may not match the character count in ZoomGrants. The ZoomGrants count is the one that takes priority.

Budget Tab

Item Description	Cash Match Secured	Cash Match Pending	In-kind Match Source	EMSWCD	Total
Grants	\$ <input type="text"/>				
Memberships/other cash contributions	\$ <input type="text"/>				
Volunteer labor/donated services	\$ <input type="text"/>				
Donated supplies and equipment	\$ <input type="text"/>				
	Total \$ 0.00				

In the **Budget** tab of the online application, please provide a project budget, including revenues and expenditures, which directly relates to the project description and work plans. Please use the budget narrative to explain how your figures are calculated. You must also provide more expense detail in a separate Excel sheet template located in the documents library.

Project Work Plan Tab

In the **Project Work Plan** tab in the online application, please list the activities, time-line and projected outcomes (two page limit). If you are awarded funding, this will become the Scope of Work in your Funding Agreement. To expand a text box to display more text, click and drag in the lower right corner of the box.

Project Work Plan	Activities	Timeline	Outcomes/Deliverables
1	<div style="border: 1px solid gray; height: 40px;"></div>	<div style="border: 1px solid gray; height: 40px;"></div>	<div style="border: 1px solid gray; height: 40px;"></div>
2	<div style="border: 1px solid gray; height: 40px;"></div>	<div style="border: 1px solid gray; height: 40px;"></div>	<div style="border: 1px solid gray; height: 40px;"></div>

Documents Tab

Documents Requested *	Required?	Uploaded Documents *	
Organizational budget, including prior and current fiscal year. For large institutions such as universities or cities, please provide a program budget.	Required		<input type="button" value="Upload"/>
Biographies of key staff and/or contractors (one paragraph each)	Required	-none-	<input type="button" value="Upload"/>
List of Board members and their affiliations. Please indicate how long each member has served. If your organization does not have a board, please provide a list of Steering Committee members or other oversight committee members.	Required	-none-	<input type="button" value="Upload"/>

In the **Documents** tab in the online application, please upload the following additional attachments to support, expand on and provide additional detail about the project. Note that some but not all of these documents are required. The requests are listed separately, and there is a separate 'Upload' button for each request. Click the 'Upload' button next to a request to upload or provide a link to your file. In the File Upload Window that opens, complete the three steps:

1. Enter a **description**/file name.
Use something short and concise, without punctuation marks such as periods, apostrophes, or quote marks. The name entered here does *not* need to match the file name on your computer.
2. Choose if you will **upload** or provide a **link** to the file.
Uploading the file takes a copy of the document on your computer and puts it up on the ZoomGrants server.

Providing a link to a file gives access to the document wherever it is stored on the internet, such as on your website or cloud storage like Dropbox. If you use the link option, you **must** leave the file in that location for the duration of the grant program. Do not move or delete it.

3. If uploading, **select** the file from your computer. If linking, **paste** the link into the box.

Click the “Upload Now” button at the bottom of the window. Wait until you see the red confirmation message at the top of the window before uploading an additional document or closing the window.

A few additional notes about attaching documents to your application:

- File uploads are limited to **4MB each**, but you can upload an **unlimited** number of files for each document request. If you have a file that exceeds the 4MB limit, try splitting it up into separate pieces and uploading them separately.
- You can use the same File Upload Window to upload more than one document for each request. If you’re putting files into the same slot, you do not need to close and reopen the window each time.
- Use the “Refresh Page” button in the top right section of the page or near the top of the Documents tab to reload the page after uploading your documents.

Submitting Your Application

When you are done filling out the application and you’re ready to submit it, click the “Submit Now” button at the top of the tab.

Remember that only the **application owner** (the person who owns the applicant account) can submit the application. If you are a collaborator, you will not see the Submit button and will not be able to submit the application. Contact the application owner to request that they submit the application.

ZoomGrants will run a **check for completion** to make sure that you have answered all of the presented questions and uploaded a document in each of the required document request slots. If you are missing anything, the system will list those fields in red, indicating in which tab you can find the fields and which field is empty. Go through the application and fill in those fields. When you are done, use the Refresh Page button in the top right section of the page to reload the page. Click the Submit Now button to run the check again. If you’ve answered the questions and provided the documents, you’ll be presented with a box into which you can enter your initials, then click the “Submit” button again.

A confirmation email will be sent within 24 hours from EMSWCD staff via ZoomGrants that the application was received. To ensure that you are receiving emails about your grant, please add to your “safe senders list” the email address Notices@zoomgrants.com. If you do not receive a confirmation, please email or call the grants coordinator at EMSWCD.

After you have submitted your application, you can always access it by logging into your account on the ZoomGrants homepage – <https://www.zoomgrants.com/login>. You'll land on your My Account Home page. Click the Submitted tab to access your application for the grant program. After the submission deadline, you will not be able to make any changes to your application.

ZoomGrants provides additional information for how to find and manage your applications here:

<https://zoomgrants.zendesk.com/hc/en-us/articles/216261458-Finding-Your-Applications>