

Measure Q Urban Open Space Grant Program 2017/2018

ZoomGrants Tutorial



ZoomGrants is an online grant application tool used for the Grant Program. Below are instructions with screenshots to help you navigate the system.

Grant questions

Megan Dreger
Grants Administrator

Email: mdreger@openspaceauthority.org
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Technical questions

ZoomGrants Tech Support Desk
(7am - 4pm Monday - Friday)

Email: Questions@ZoomGrants.com
Phone: (866) 323-5404 x2
FAQ: <https://zoomgrants.zendesk.com>

General tips:

Preferred Browser: ZoomGrants can be used on any internet-enabled device using a recent version of any browser. ZoomGrants recommends using Chrome.

Text Entry: You are welcome to compose your answers in a word processor outside of the ZoomGrants application and then copy and paste your responses into the answer fields in the online version. However, please note that ZoomGrants fields will not save the formatting (bold, italics, bullets, etc). ZoomGrants recommends using unformatted text only.

Auto-Save: ZoomGrants automatically saves your progress, so you can log out and log back in as many times as you need to in order to complete your Application. You do not need to complete your application in one sitting.

Accessing ZoomGrants

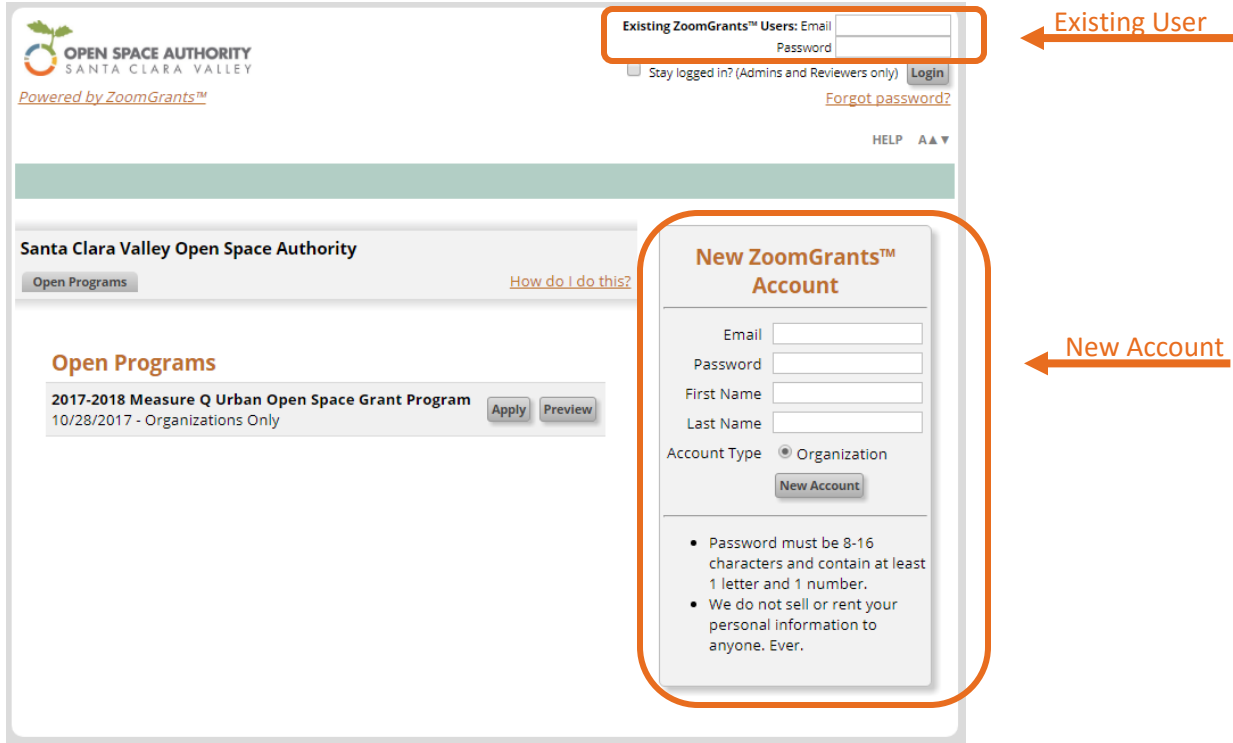
The Measure Q Urban Open Space Grant application is available at:
<https://zoomgrants.com/gprop.asp?donorid=2232&limited=1411>

It is also linked from the OSA's web page <http://www.openspaceauthority.org/urban>.

ZoomGrants Sign In

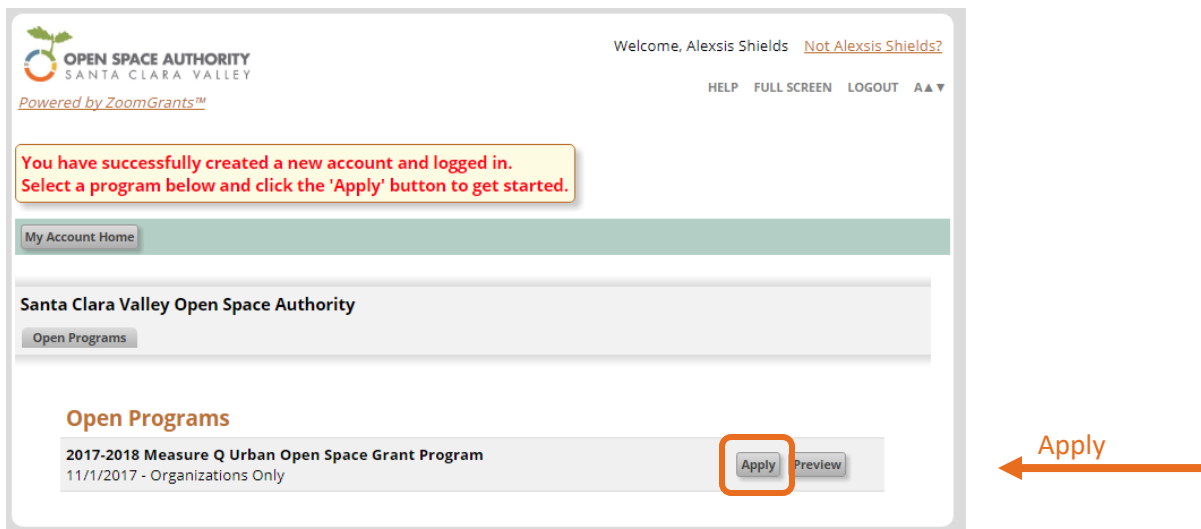
The first time you use ZoomGrants, you'll need to create a new account.

If you already have an account, log in using the boxes for existing users at the upper right corner.



ZoomGrants Starting Your Application

Click on the Apply button to create an application. Note that if you have used ZoomGrants before, you may see more than one grant listed. Select the Measure Q Urban Open Space Grant Program.



ZoomGrants Overview

The ZoomGrants page includes:

- Refresh Page Button: ZoomGrants auto-saves regularly for most text entries, but there is also a 'Refresh Page' button in case you do not see changes automatically update. Note that some pages (e.g. the Documents page for uploading files) require you to use the 'Refresh Page' in order to see your changes.
- Tabs for General Information: Open Programs, Public Workshops, Questions, Library, etc. Note that the Library section includes important documents related to the grant application, including maps, reference documents, and the Grant Guidelines.
- Quick Access to the four Application tabs: A. Applicant Information, B. Project Description, C. Work Plan, D. Documents Upload.

The screenshot displays the ZoomGrants interface for the Santa Clara Valley Open Space Authority. At the top, the user is logged in as Alexis Shields. A green notification bar states, "Thank you. Your application has been created. You may get started now." A "Refresh Page" button is highlighted with an orange box. Below this, the page title is "2017-2018 Measure Q Urban Open Space Grant Program" with a deadline of 11/1/2017. A navigation bar includes tabs for "Open Programs", "Public Workshops", "Questions", "Library", and "Contact Admin". The "Public Workshops" section is expanded, showing two events: one on Tuesday, December 5, 2017, at the Tully Branch Library, and another on Wednesday, December 6, 2017, as an online workshop. A "Questions" section provides contact information for Megan Dreger, Grants Administrator. At the bottom, the application status is "Not Submitted", and the amount requested is "\$ 0.00". Navigation tabs for "A. Applicant Information", "B. Project Description", "C. Work Plan", and "D. Documents Upload" are visible, along with "Submit Now", "Print/Preview", and "Archive this Application" buttons.

A. Applicant Information Tab

This page includes questions about the organization.

Application Status: Not Submitted

\$ 0.00 requested

[Submit Now](#) [Print/Preview](#) [Archive this Application](#)

A. Applicant Information B. Project Description C. Work Plan D. Documents Upload [Activity Log](#)

A. Applicant Information

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

Instructions [Show/Hide](#)

Please answer all questions below. If a question does not apply, please enter "N/A." To expand a text box to display more text, click and drag in the lower right corner of the box.

Application Title/Project Name	<input type="text"/>
Amount Requested <i>Min: \$25,000 Max: \$100,000</i>	\$ <input type="text" value="0"/>
Total Project Cost	\$ <input type="text" value="0"/>

Applicant Information

A. Applicant Information Tab - Adding Users to an Account

Each organization's account is managed by one single login credentials (email address and password). If you'd like to allow others to access the account you can either:

1. Share your login credentials
2. Invite others by adding them as 'Collaborators'. This section is near the top of the Applicant Information page. Add their email address and click 'Invite'. They will receive an email invitation. Note: Collaborators can edit the answers to application questions, but they cannot submit, archive, or delete an application.

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"/>	Invite
<input type="checkbox"/> 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.

B. Project Description Tab

This page includes the majority of the application questions. Please answer all questions. If a question does not apply, please enter "N/A." Note that if any are left blank, ZoomGrants will not allow you to submit the application.

Application Status: Not Submitted
\$ 0.00 requested
Submit Now Print/Preview
Archive this Application
A. Applicant Information B. Project Description C. Work Plan D. Documents Upload Activity Log

B. Project Description

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

Instructions [Show/Hide](#)

Please answer all questions below. If a question does not apply, please enter "N/A." To expand a text box to display more text, click and drag in the lower right corner of the box.

Project Overview

1. Grant Category (check all that apply)

- Environmental Stewardship and Restoration
- Parks, Trails, and Public Access
- Environmental Education
- Urban Agriculture / Food Systems

C. Work Plan Tab

This page includes a table to outline the project activities, timeline, and outcomes/deliverables.

Application Status: Not Submitted
\$ 0.00 requested
Submit Now Print/Preview
Archive this Application
A. Applicant Information B. Project Description C. Work Plan D. Documents Upload Activity Log

C. Work Plan

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

Instructions [Show/Hide](#)

Please list the activities, timeline and projected outcomes. To expand a text box to display more text, click and drag in the lower right corner of the box.

C.1. Project Work Plan

Task Number - Numbered list of tasks, e.g. "1, 2, 3" or tasks and sub-tasks, e.g. "1, 1A, 1B"

Activities - A description of each task, e.g. "Develop outreach materials for use at public meetings"

Timeframe - Estimated schedule or completion date for each task, e.g. "October - December 2018" or "December 2018"

Outcome / Deliverables - A description of the final product of each task, e.g. "Print-ready files for outreach brochure in English and Spanish"

Task Number	Activities	Timeframe	Outcome/Deliverables
1			

D. Documents Upload Tab

This form is to upload all required documents. All applications must upload a budget, financial statements, an acknowledgement form, and an authorizing resolution. Other documents may be required, depending on the project. Note that the application cannot be submitted until at least the four required documents have been uploaded.

To upload a document:

1. Download the template, if applicable. This template is required for the budget and optional for the authorizing resolution.
2. Click on 'Upload'

Application Status: Not Submitted

\$ 0.00 requested

Submit Now Print/Preview

Archive this Application

A. Applicant Information B. Project Description C. Work Plan **D. Documents Upload** Activity Log

D. Documents Upload

Instructions [Show/Hide](#)

This form is to upload all required documents. All applications must include an authorizing resolution, financial statements, a budget, and an acknowledgment form. Additional documents may be required, depending on the project. See the Grant Guidelines for information about required documents.

Documents Requested *	Required?	Uploaded Documents *	
Financial statements	Required	-none-	Upload
Authorizing Resolution from Governing Body Download template: Resolution Template	Required	-none-	Upload
Project Budget Download template: MQ UOS Project Budget	Required	-none-	Upload
Acknowledgment Form Download template: Acknowledgment Form	Required	-none-	Upload
Fiscal Sponsorship Agreement Download template: Fiscal Sponsorship Agreement	-none-	-none-	Upload
Land Tenure Form Download template: Land Tenure Form	-none-	-none-	Upload

1. Template

2. Upload

3. A File Upload Window will appear. If it does not appear, it may be due to your browser's popup blocker. Check your browser's settings to enable popups for this website.
4. Files can either be uploaded or linked. For files larger than 4 Mb, please use the link option. Multiple files can be uploaded to the same category (e.g. multiple files under Letters of Support).

3. File Upload

File Upload Window - Google Chrome

ZoomGrants (GRANTANALYST.COM, LLC) [US] https://www.zoomgrants.com/fileup.asp?g...

ZoomGrants

File Upload Window

Document Requested: Financial statements

Uploaded Document: -none-

1 File description: (e.g. IRS Letter, Financials, etc.)

2 Type of attachment: File Upload (file size limited to 4MB each) Link to File (YouTube, Dropbox, cloud storage, webservice, etc.)

3 Select a file to upload: No 'f' or 'F' allowed in filenames. Be sure to include the file extension. File size is limited to 4MB.

Supported file extensions: DOC, XLS, DOCX, XLSX, TXT, RTF, WPS, SXW, ODT, TAB, CSV, WKS, SXO, ODS, PPT, PPS, SWI, ODP, POF, GIF, JPS, PNG, MW, WAV, AIF, MP3, MP4, MID, MPG, MOV, WMV, RM, JPEG, SHP, SHX, DBF, KML, KMZ, TIF, TIFF

Document type: PROPOSAL DOCUMENT

Be sure to verify that your upload was successful by testing the link to download your file after this page reloads.

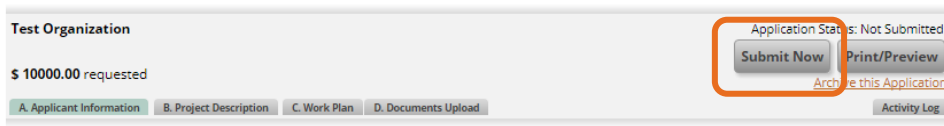
* ZoomGrants™ is not responsible for the content of uploaded or linked documents.

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5. Click on the 'Refresh Page' at the top of the Documents page to update the list of uploaded files.

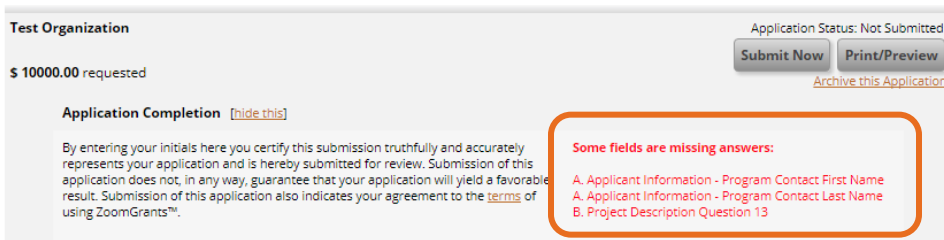
Submit Application

Once you have answered all questions and uploaded the required documents, click on 'Submit Now.'



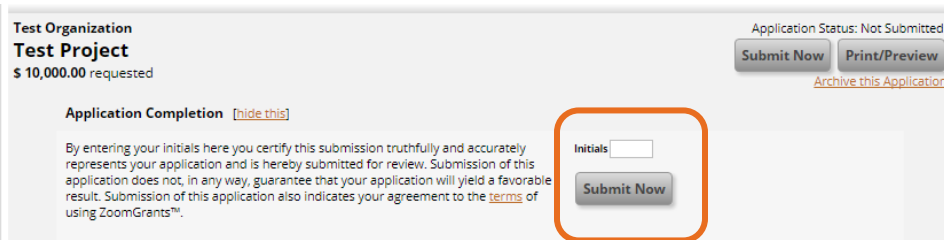
The screenshot shows the application submission interface. At the top, it says "Test Organization" and "\$ 10000.00 requested". On the right, the "Application Status" is "Not Submitted". There are two buttons: "Submit Now" and "Print/Preview". The "Submit Now" button is highlighted with an orange box. Below the buttons, there are navigation tabs: "A. Applicant Information", "B. Project Description", "C. Work Plan", and "D. Documents Upload". There is also an "Activity Log" link.

The system will check to ensure you have answered every question and uploaded the required documents. Any skipped questions or missing documents will be listed in red.



The screenshot shows the application submission interface with a red box highlighting a list of missing answers. The text in the red box is: "Some fields are missing answers: A. Applicant Information - Program Contact First Name, A. Applicant Information - Program Contact Last Name, B. Project Description Question 13".

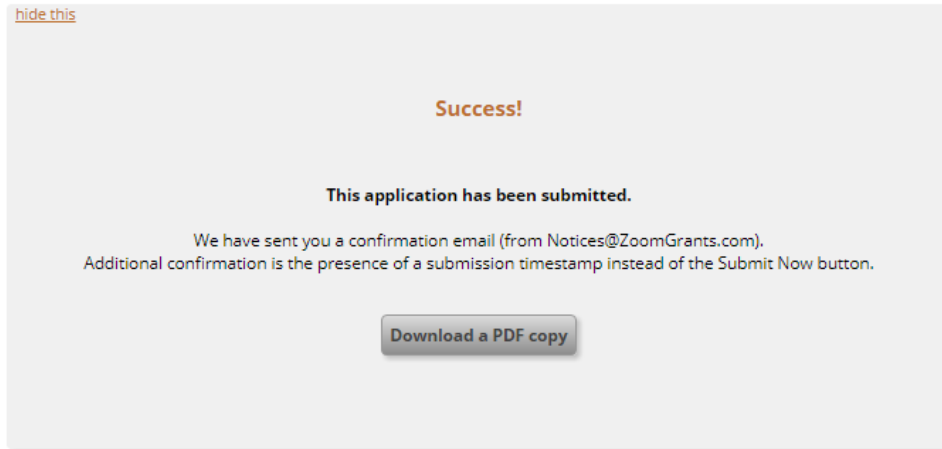
Once you've corrected any missing questions/documents, click the gray 'Refresh Page' button at the top of the page to refresh the submission errors. Click 'Submit Now' and you'll see the Application Completion check. Add your initials and Click 'Submit Now'



The screenshot shows the application submission interface. At the top, it says "Test Organization" and "Test Project" with "\$ 10,000.00 requested". On the right, the "Application Status" is "Not Submitted". There are two buttons: "Submit Now" and "Print/Preview". The "Submit Now" button is highlighted with an orange box. Below the buttons, there are navigation tabs: "A. Applicant Information", "B. Project Description", "C. Work Plan", and "D. Documents Upload". There is also an "Activity Log" link.

Success!

You will see a note that the application has been submitted. An email confirmation will also be sent.



Accessing an application already in progress

Once you've started an application, it will be saved and you can return any time before the deadline to continue working on it. To access an application, return to the ZoomGrants login page:

<https://zoomgrants.com/gprop.asp?donorid=2232&limited=1411>

Click on the title of your application to edit. In this example, the title of the application was "Test Project".

