

Measure Q Urban Open Space Grant Program 2016/2017

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
Phone: 408-224-7476

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.

1. Accessing ZoomGrants

The Measure Q Urban Open Space Grant application is available at:
<https://zoomgrants.com/gprop.asp?donorid=2232&limited=1104>

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

2. 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.

Existing ZoomGrants™ Users: Email Password ☐ Stay logged in? (Admins and Reviewers only) [Forgot password?](#)

New ZoomGrants™ Account

Email
Password
First Name
Last Name
Account Type ☒ Organization

- Password must be 8-16 characters and contain at least 1 letter and 1 number.
- We do not sell or rent your personal information to anyone. Ever.

Existing User (arrow pointing to login fields)

New Account (arrow pointing to new account form)

3. 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.

Welcome, Fake Account [Not Fake Account?](#)
HELP FULL SCREEN LOGOUT ▲▼

You have successfully created a new account and logged in.
Select a program below and click the 'Apply' button to get started.

My Account Home

Santa Clara Valley Open Space Authority
Open Programs

Open Programs

Measure Q Urban Open Space Grant Program
8/26/2016 - Organizations Only

Apply (arrow pointing to the Apply button)

4. 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, Instructions, 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 pages: Applicant Information, Project Description, Project Goals, Documents.

The screenshot displays the ZoomGrants interface for the Santa Clara Valley Open Space Authority. At the top, the logo and name are visible, along with a 'Welcome, Fake Account' message and a 'Not Fake Account?' link. A 'Thank you' message states: 'Thank you. Your application has been created. You may get started now.' Below this, a 'My Account Home' button is present, and a 'Refresh Page' button is highlighted with an orange box. The main section is titled 'Santa Clara Valley Open Space Authority' and 'Measure Q Urban Open Space Grant Program', with a deadline of 8/26/2016. A navigation bar includes tabs for 'Open Programs', 'Instructions', 'Eligibility', 'Public Workshops', 'Library', 'Contact Admin', and 'Announcements'. The 'Instructions' section is expanded, showing details about the application process and a note about public record. The 'Library' section is also expanded, listing various documents and templates. At the bottom, the 'Application Status' is 'Not Submitted', and there are buttons for 'Submit Now' and 'Print/Preview'. A 'Quick Access to Application Pages' section at the bottom lists 'Applicant Information', 'Project Description', 'Project Goals', and 'Documents'.

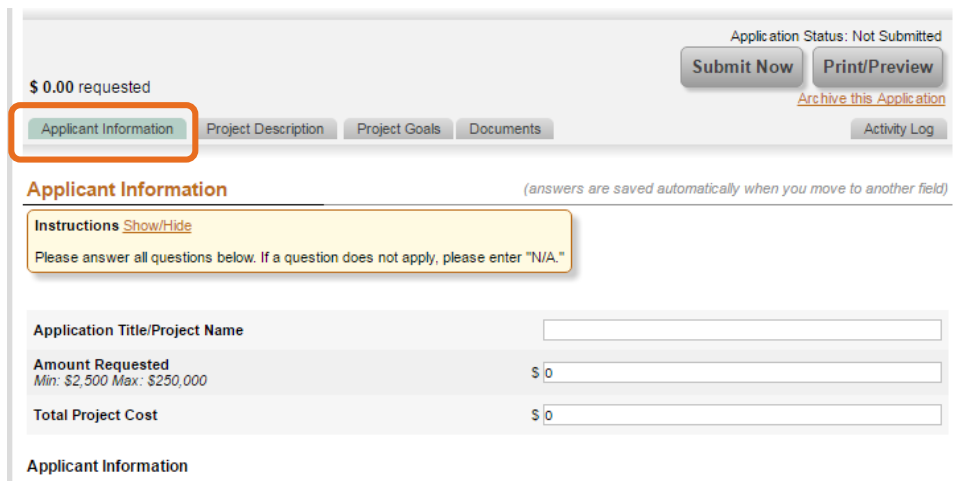
General Info

Library

Quick Access to Application Pages

5. Applicant Information Page

This page includes questions about the organization.

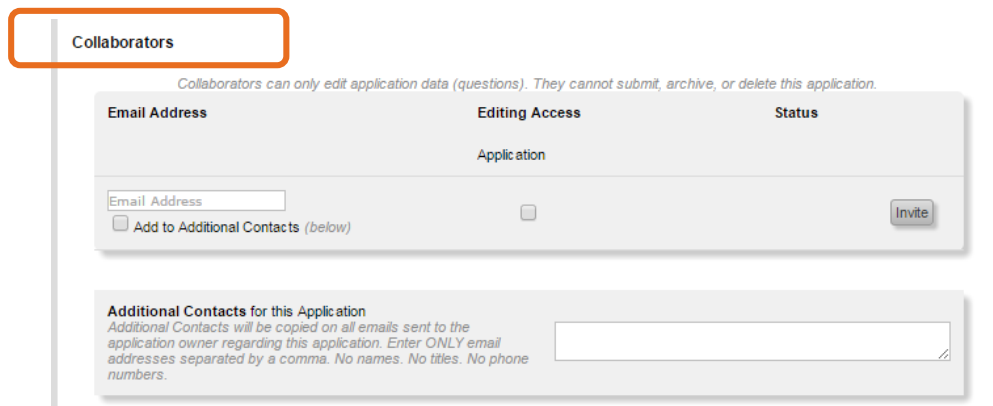


The screenshot shows the 'Applicant Information' page. At the top, it says '\$ 0.00 requested' and 'Application Status: Not Submitted'. There are buttons for 'Submit Now', 'Print/Preview', and a link 'Archive this Application'. Below these are tabs for 'Applicant Information' (highlighted with an orange box), 'Project Description', 'Project Goals', 'Documents', and 'Activity Log'. The 'Applicant Information' section has a yellow instruction box that says 'Please answer all questions below. If a question does not apply, please enter "N/A."'. Below this are three input fields: 'Application Title/Project Name', 'Amount Requested' (with a range of \$2,500 to \$250,000), and 'Total Project Cost'.

6. Applicant Information Page - 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.



The screenshot shows the 'Collaborators' section, which is highlighted with an orange box. It contains a table with columns for 'Email Address', 'Editing Access', and 'Status'. Below the table is a form to add a new collaborator, including an 'Email Address' input field, a checkbox for 'Add to Additional Contacts (below)', and an 'Invite' button. At the bottom, there is a section for 'Additional Contacts for this Application' with a text area for entering email addresses and a note: '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.'

7. Project Description Page

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.

The screenshot shows the 'Project Description' page. At the top, it says '\$ 0.00 requested' and 'Application Status: Not Submitted'. There are buttons for 'Submit Now', 'Print/Preview', and 'Archive this Application'. A navigation bar includes 'Applicant Information', 'Project Description' (highlighted with an orange box), 'Project Goals', and 'Documents'. Below the navigation bar, the 'Project Description' section is titled, with a note '(answers are saved automatically when you move to another field)'. An 'Instructions' box says 'Please answer all questions below. If a question does not apply, please enter "N/A."'.

Project Overview

1. Project Abstract
(Brief, 3-4 sentences)

Maximum characters: 1000. You have 1000 characters left.

8. Project Goals Page

This page includes a list of sample measures to describe and evaluate the project goals. Note that this list is very broad and many of these may not be applicable to your project. Please include only the applicable goals, and write in any additional goals under "Other."

The screenshot shows the 'Project Goals' page. At the top, it says '\$ 0.00 requested' and 'Application Status: Not Submitted'. There are buttons for 'Submit Now', 'Print/Preview', and 'Archive this Application'. A navigation bar includes 'Applicant Information', 'Project Description', 'Project Goals' (highlighted with an orange box), and 'Documents'. Below the navigation bar, the 'Project Goals' section is titled, with a note '(answers are saved automatically when you move to another field)'. An 'Instructions' box says 'Below are sample measures to describe and evaluate the project goals. Note that this list is very broad and many of these may not be applicable to your project. Please include only the applicable goals, and write in any additional goals under "Other."'.

Goals (15 pts)

	Goal:
People	
Number of: People attending public meeting	<input type="text"/>
Number of: People participating	<input type="text"/>
Number of: Youth (under 18) participating	<input type="text"/>

9. Documents Page

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

Submit Now Print/Preview

Archive this Application

Activity Log

Documents

Instructions [Show/Hide](#)

This form is to upload all required documents. All applications must include a budget, financial statements, and an authorizing resolution. 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: Sample Resolution	Required	-none- Upload
Project Budget Download template: Project Budget Form	Required	-none- Upload
Letters of Support	-none-	-none- Upload
Letters from Project Partners	-none-	-none- 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>

Close Window Help

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, webserver, etc.)

3 Select a file to upload: Choose File | No file chosen

No T or J 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, .SXC, .ODS, .PPT, .PPS, .SXI, .ODP, .PDF, .GIF, .JPG, .PNG, .MOV, .WMV, .AIF, .MP3, .MP4, .MID, .MPG, .MOV, .WMV, .RM, .JPEG, .SHP, .SHX, .DBF, .KML, .KMZ, .TIF, .TIFF

Document type: PROPOSAL DOCUMENT

Upload Now

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

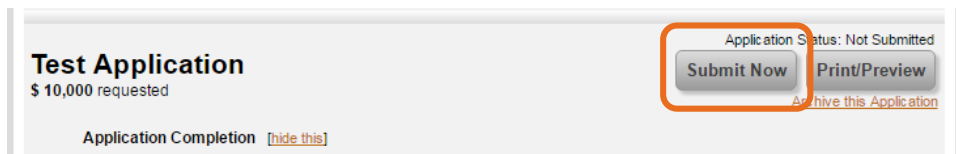
* ZoomGrants™ is not responsible for the content of uploaded or linked documents.

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

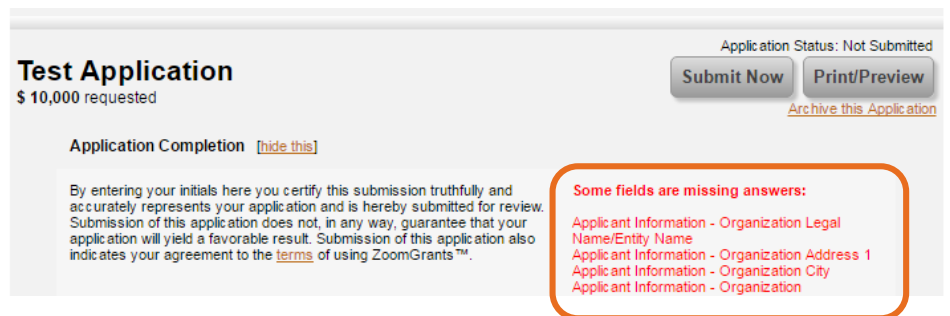
10. Submit Application

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



The screenshot shows the 'Test Application' page with the application status 'Not Submitted'. The 'Submit Now' button is highlighted with an orange box. The page also displays '\$ 10,000 requested' and an 'Application Completion' link.

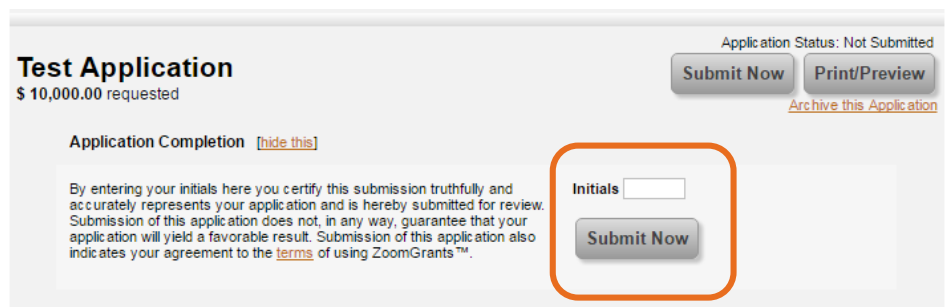
The system will check to ensure you have answered every question and uploaded the required documents. Any skipped questions or missing documents will be listed in red.



The screenshot shows the 'Test Application' page with the application status 'Not Submitted'. The 'Submit Now' button is highlighted with an orange box. The page also displays '\$ 10,000 requested' and an 'Application Completion' link. A red box highlights the following missing answers:

- Applicant Information - Organization Legal Name/Entity Name
- Applicant Information - Organization Address 1
- Applicant Information - Organization City
- Applicant Information - Organization

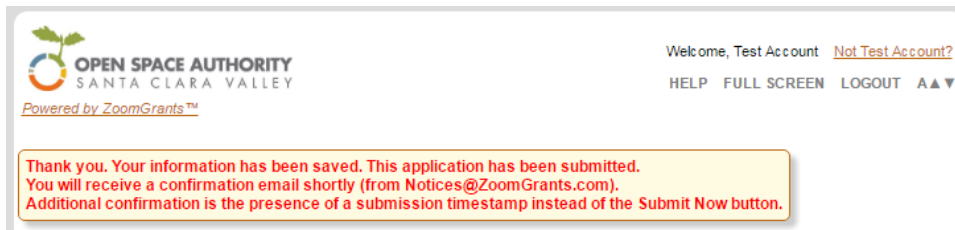
Once you've corrected any missing questions/documents, click the gray 'Refresh Page' button at the top of the page to refresh the submission errors. Click 'Submit Now' and you'll see the Application Completion check. Add your initials and Click 'Submit Now'



The screenshot shows the 'Test Application' page with the application status 'Not Submitted'. The 'Submit Now' button is highlighted with an orange box. The page also displays '\$ 10,000.00 requested' and an 'Application Completion' link. A text box labeled 'Initials' is visible, and the 'Submit Now' button is highlighted with an orange box.

11. Thank you!

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



12. Accessing an application already in progress

Once you've started an application, it will be saved and you can return anytime 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=1104>

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

