DEPARTMENT OF PLANNING, INDUSTRY AND ENVIRONMENT

Grants Management System Online Portal User Manual

Grants Branch

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1. Basic navigation of the Grants Management System portal

The following image of the Grants Management System (GMS) header will be at the top of the screen regardless of where you are working in the GMS.

Figure 1 GMS header

1.1 Basic navigation icons

You will be able to identify any icon in the GMS by holding the computer mouse over the image.

Icon image	Meaning	Description
Home	Home	Clicking on the home button will bring you back to the home page from wherever you are on the GMS.
Home | Edit Application	History	The section under the Home button will change as you work in the GMS. It will show the history of your GMS activity. Click on anything on the list to go back to that specific location.
	Applications	A shortcut to access applications that have not yet been processed.
	Profile	A short cut to manage your profile and personal settings.
	Projects	A short cut to access successful applications that have been processed to the active project stage.
	Help	Provides basic navigation text.
	Sign out	Signs you out of the Grant Management System instantly.
	Preview	Allows you to download your application. The information is downloaded in separate documents: Output Form.DOC, EOI.PDF and Preliminary Workplan.XLSX.
Save	Save	Save your information as your progress.
	Help text	A very useful tool. Clicking on this will provide program-specific assistance on the relevant question.

*	Mandatory data	Information with a red asterisk must be completed.
Previous	Previous page	Navigate back to the previous page.
Next	Next page	Navigate to the next page.
	Expand	Click on this icon to view information under a header.
	Collapse	Click on this icon to hide information under a header.
	Add/delete rows	Use the plus and minus buttons to add and remove extra rows.
	Edit	Edit data.
Reset	Reset	Clear all the text fields on a page.
	Delete	Delete data.
	Alert	Indicates validation errors in a particular section e.g. if mandatory fields are not completed.

Figure 2 Basic navigation icons

1.2 Error messages

When entering information into the GMS, any errors (such as an incorrect email format or not meeting the criteria for a question) will result in red text appearing to advise you of the error. This error text will appear throughout the GMS, see example below:

Figure 3 Error message displayed in red text

2. Registering a new user

Before you can access the GMS, you will be required to register as a new user by providing basic information such as your email, first name, last name and password. The steps are detailed below. Once you have entered your information, the GMS will send a verification email to your nominated email address. On receipt of this email, click the link provided to activate your account to gain access to the GMS.

If you do not receive the email within a few moments, look in your junk email folder as the email may have been blocked by spam filters. For any further support, please contact the relevant person for assistance. See *Contact information* at the back of this document for details.

> If there are identifiable errors in the information you enter; such as an incorrect email format or not meeting the criteria for password strength, red text will appear.

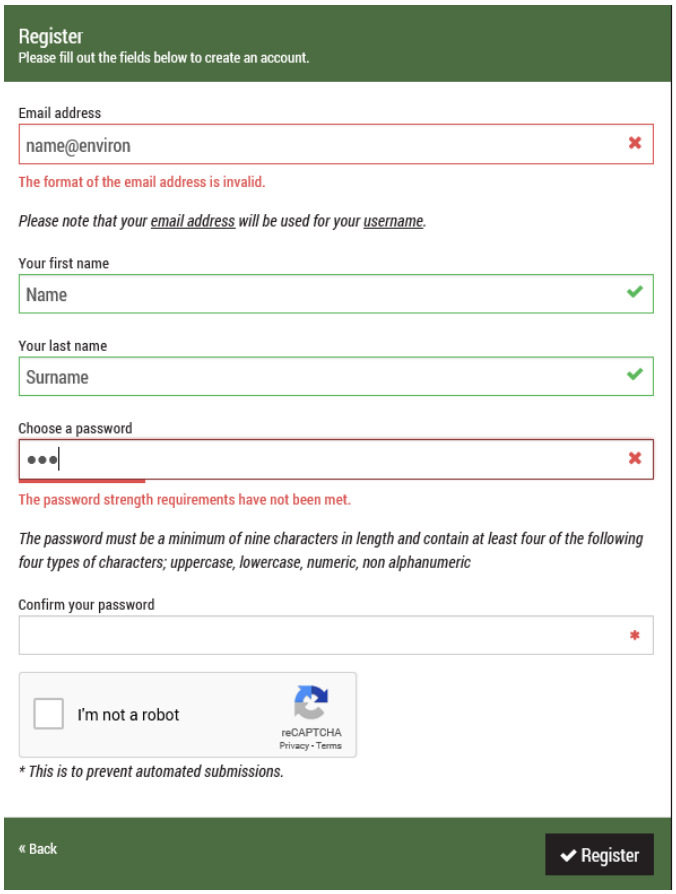


Figure 4 Error message displayed in red text on Register screen

2.1 How to register

To register you will need to click on **Register now** on the **Log In** screen.

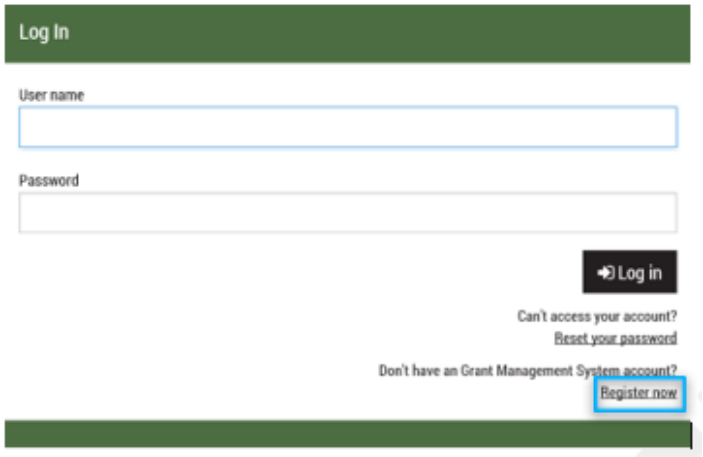


Figure 5 The Register now link on the Log In screen

Complete the mandatory (*) fields on the **Register** screen, tick the 'I'm not a robot' box and perform the Captcha verification. Please note the requirements for the password are detailed on the **Register** screen.

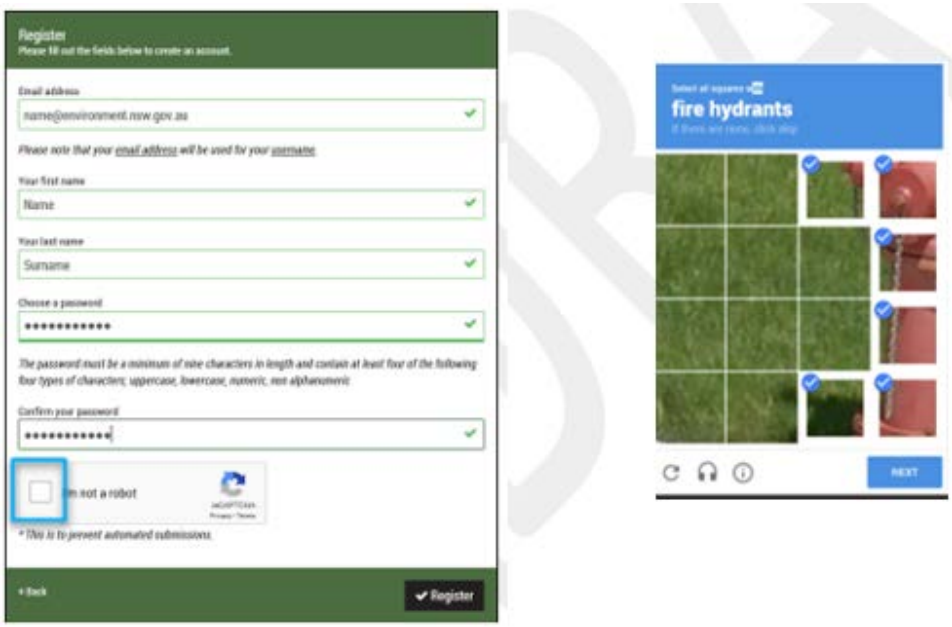


Figure 6 Perform the Captcha verification on the Register screen

A screen will appear advising you of your successful registration. At this stage, you will need to go to your email inbox to activate the account.

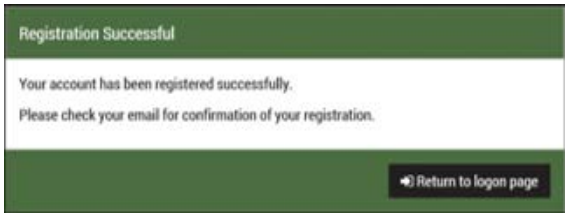
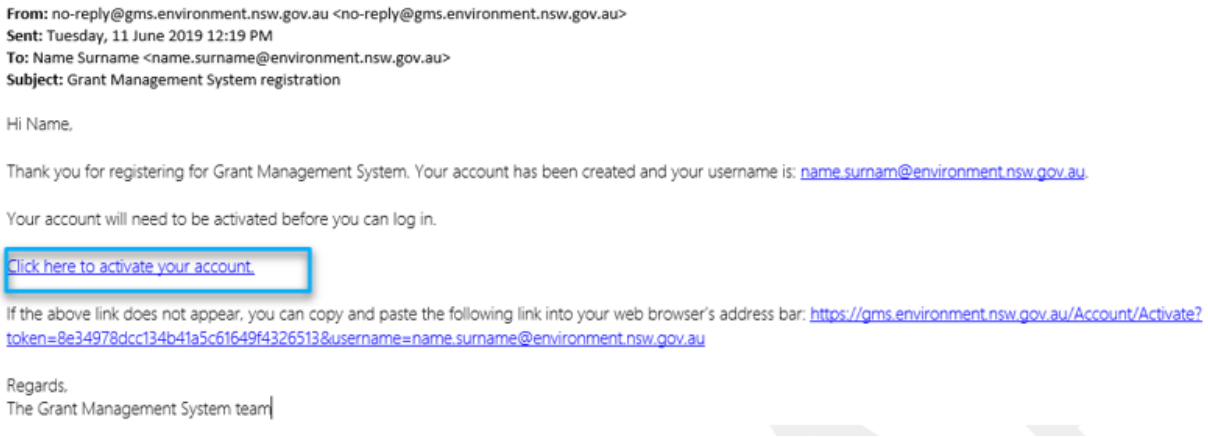


Figure 7 Registration successful screen

Open the email from noreply-gms@environment.nsw.gov.au and click on the link to activate your account. Remember to check your spam folder if it has not been received within a few minutes.


From: no-reply@gms.environment.nsw.gov.au <no-reply@gms.environment.nsw.gov.au>
Sent: Tuesday, 11 June 2019 12:19 PM
To: Name Surname <name.surname@environment.nsw.gov.au>
Subject: Grant Management System registration

Hi Name,

Thank you for registering for Grant Management System. Your account has been created and your username is: name.surnam@environment.nsw.gov.au.

Your account will need to be activated before you can log in.

Click here to activate your account.

If the above link does not appear, you can copy and paste the following link into your web browser's address bar: https://gms.environment.nsw.gov.au/Account/Activate?token=8e34978dcc134b41a5c61649f4326513&username=name.surname@environment.nsw.gov.au

Regards,
The Grant Management System team

Figure 8 Click on the link in the email to activate account

The **Account activation** screen will appear to advise you that the account has been activated. Click on the **Log in** button on this pop-up and you will be directed to the **Log In** screen.

Figure 9 Account activation successful screen

You now have access to the GMS online portal. Enter your User name (email) and password and click on **Log in**.

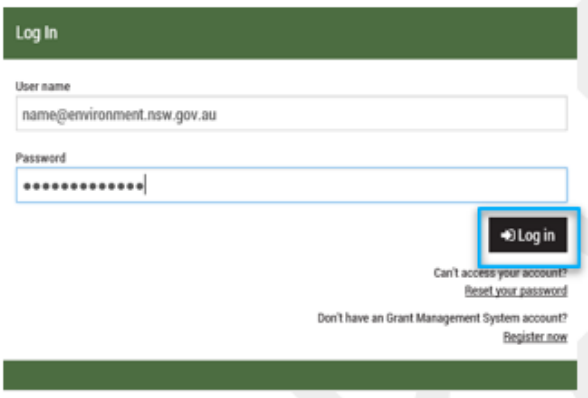


Figure 10 Log in to the GMS using your User name and password

3. Grants Management System (GMS)

You will not be able to access the GMS until you have successfully logged in.

Only one user profile can be used per computer. You are not able to open multiple tabs or browsers to access the GMS.

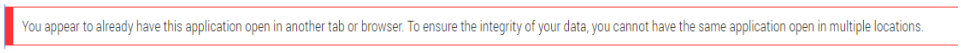


Figure 11 Error message displayed when you try to open multiple tabs or browsers

You can invite other users to view the application and control their level of access and editing rights. See section Manage access to application.

3.1 Logging into GMS online portal

Before you can login to the GMS, you will need to have registered as a New User. As a registered user, you will be able to access the GMS by entering your user name (nominated email) and password.

On the **Log In** screen, enter your username and password in the designated boxes and click on the **Log in** button.

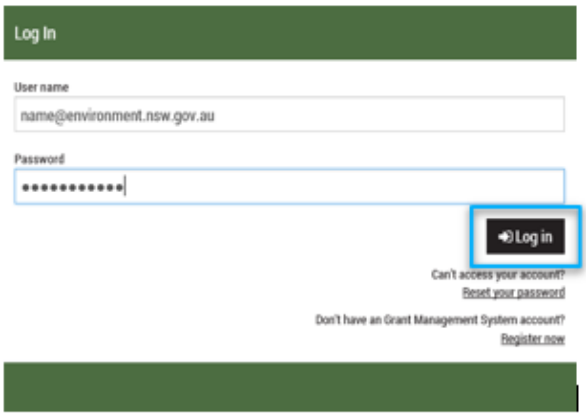


Figure 12 Log in to the GMS using your User name and password

If the details are accepted, a pop-up screen will appear with a notification that you may proceed to the GMS. Clicking on **Continue** will enable you to proceed to the GMS online portal. If you select **Cancel** you will be taken back to the Log In screen. This will occur each time you log in.

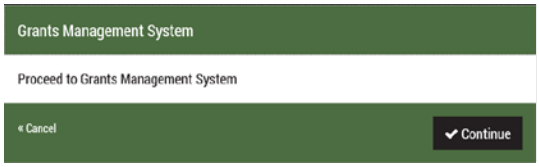


Figure 13 Continue to the GMS

If the login was unsuccessful, an error will appear in red text advising you to correct your error. The following pages will give you instructions on what to do if you forget your password or are locked out of the GMS.

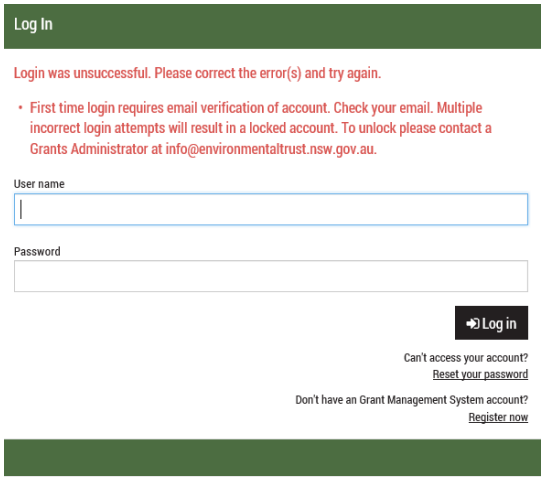


Figure 14 Error message for unsuccessful Log in

3.2 Forgot Password

If you have forgotten your password, you can reset your password by clicking on **Reset your password** on the **Log In** screen. Once you have completed the steps below an email will be sent to you containing a link to re-verify your account.

Click **Reset your password** on the **Log In** screen.

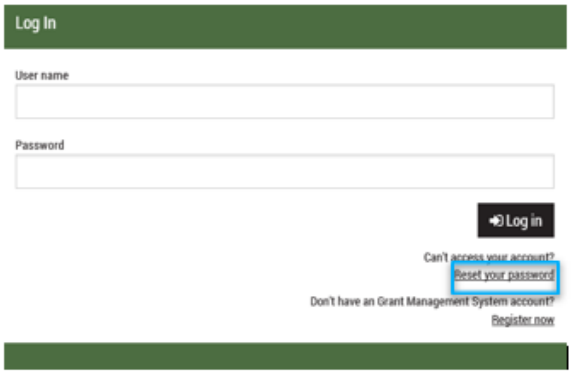


Figure 15 Reset your password

You will need to enter your User name (email) on the Password screen and tick the 'I'm not a robot' box.

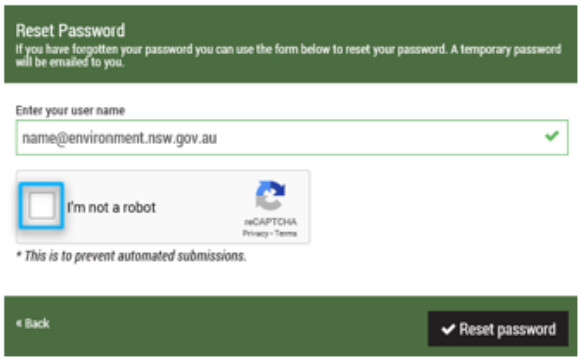


Figure 16 Enter user name and password on the Reset Password screen

Perform the Captcha verification before clicking **Reset password**.

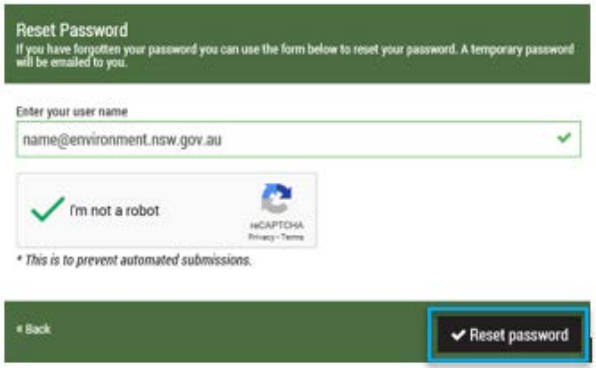


Figure 17 **Perform the Captcha verification on the Reset Password screen**

3.3 Locked out of GMS

If you have entered the incorrect password five times, you will be locked out of your account and you will need to contact us to have your account reset.

Our *Contact information* can be found on the back page of this document.

3.4 Home page

Once you have registered and had your access request activated, you can access the Grants Management System.

Once you have logged in you will be able to view the GMS online portal dashboard (Home page).

This is the page you will be directed to each time you log in and when you click on **Home** on the toolbar, located along the bottom of the GMS header.

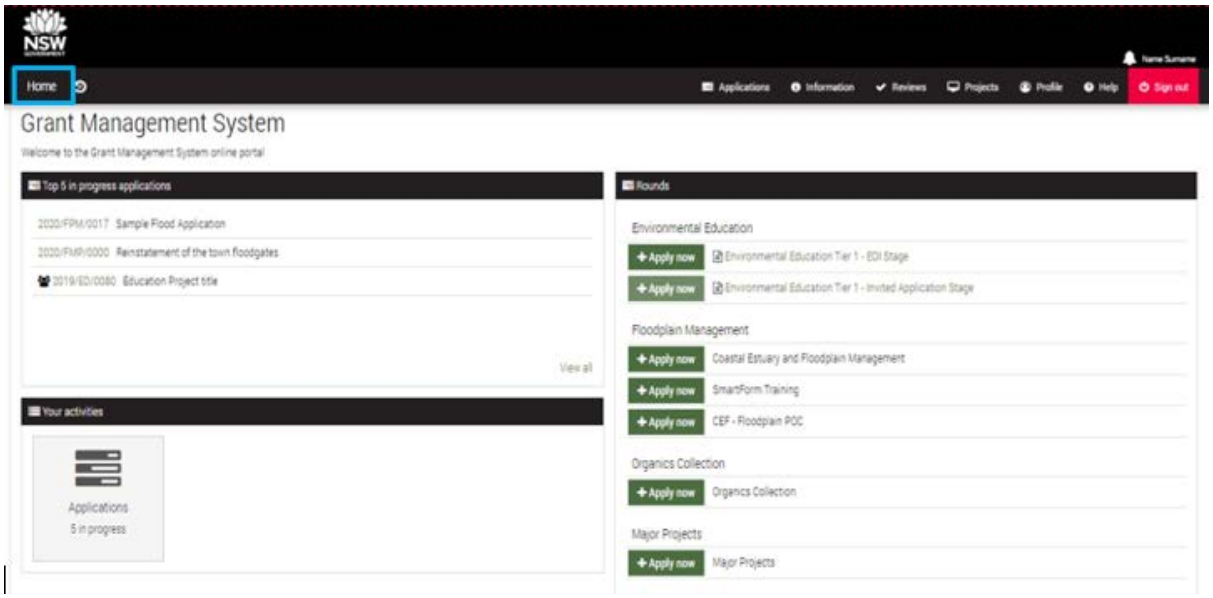


Figure 18 **GMS Home page**

On the Home page, some of the actions you will be able to perform include:

- Create and edit your profile.
- Submit new application and edit existing applications.
- Manage any successful grants.
- See the status of our grant programs and the dates they open and close.
- Submit project forms.

It is recommended that before you start the application process, you add additional details to the **Profile** section. Navigate to the profile setup by clicking on the **Profile** icon on the top right of the screen (GMS header toolbar).

Figure 19 Profile icon on GMS header toolbar

3.5 Profile setup

The profile page allows you to enter your information to create a personalised profile. You will be able to edit this information at any time.

On the left of the screen, you will see four categories and Account settings. You will need to complete; Personal details, Address details, Email details and Phone details. The last category, **Account settings**, allows you to change your user name and password, and delete your account.

The GMS will navigate you through the process a step at a time and you will notice that as you enter information you will get a green tick if the information meets the system and program requirements. A red cross will appear in the relevant text box if there is an error.

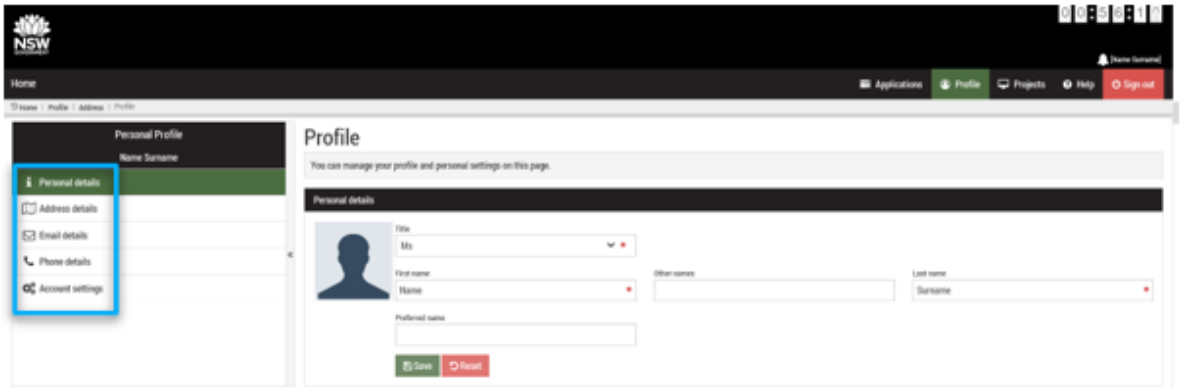


Figure 20 Profile page

3.5.1 Personal details

Through the registration process your name will have been automatically added to your profile. To complete the **Personal details** section, you will be required to select a title from the drop-down box as this is a mandatory field.

If there is no red Asterix (*****), the field is optional.

Save to continue or **Reset** to clear all the fields and start again.

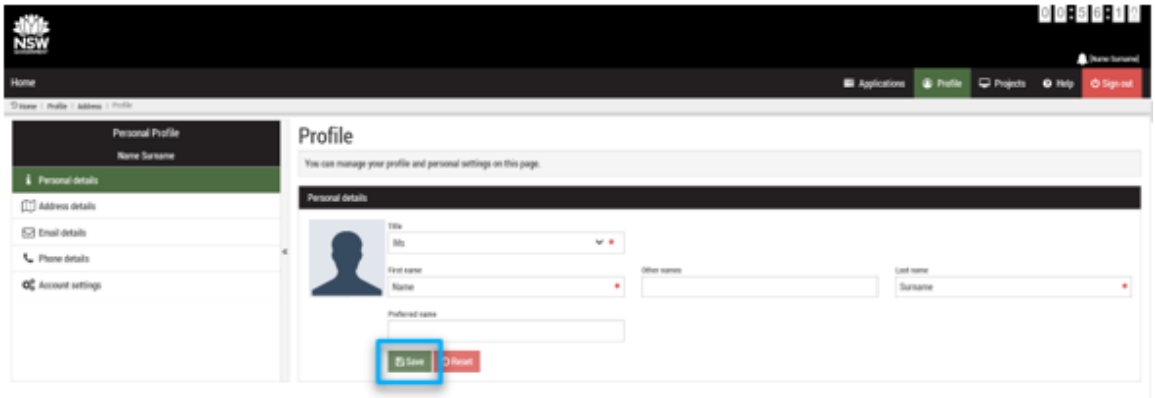


Figure 21 **Personal details section**

3.5.2 Address details

You can enter your address details by clicking on **+ Add new address**. It is recommended to add both your postal address and street address (if they differ), as a minimum.

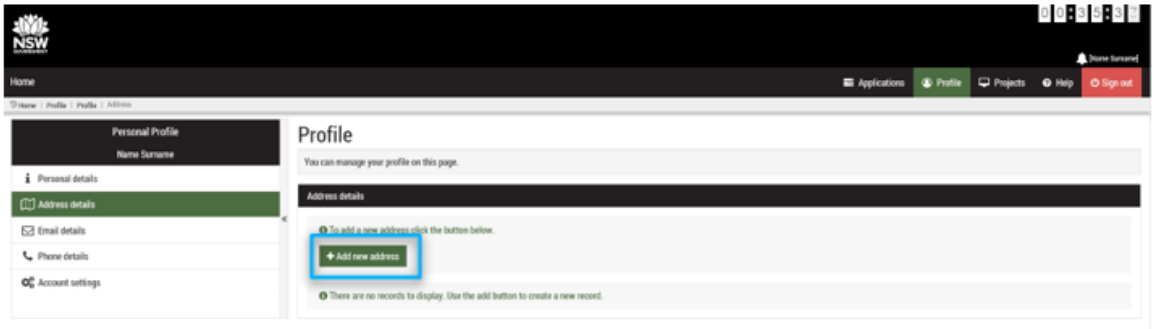


Figure 22 **Address details section**

Complete the requested fields and tick the relevant box for the address type (Courier, Mailing, Physical). As in previous sections of the GMS, if the format of your information is accepted a green tick will appear. Once you have entered the relevant information click **Save**.

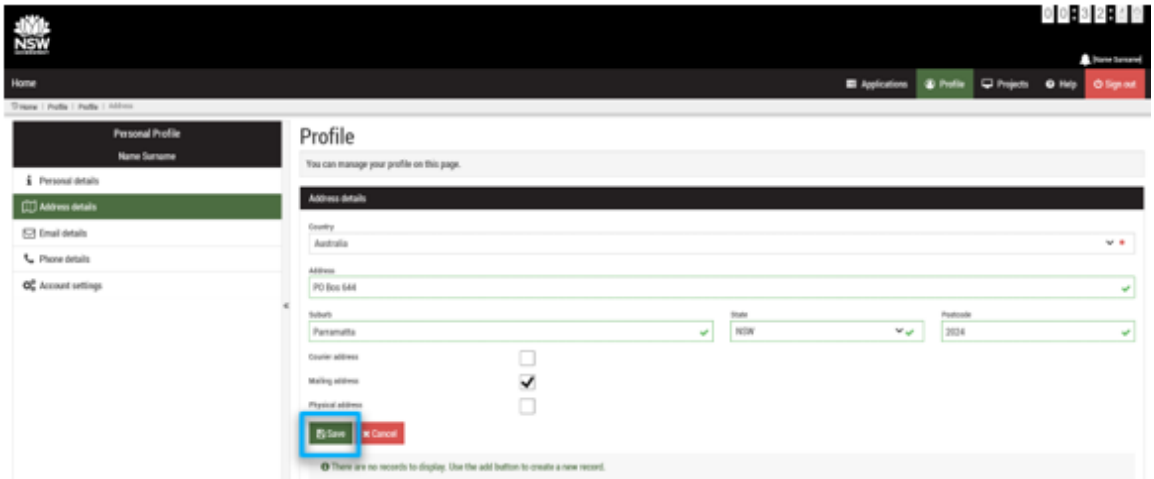


Figure 23 **Click Save to save address details section**

You will see the address details you entered are now listed under the **Address** header. You can edit (green pencil icon) and delete (red bin icon) addresses as required.

Click on **+ Add new address** to enter any additional addresses.

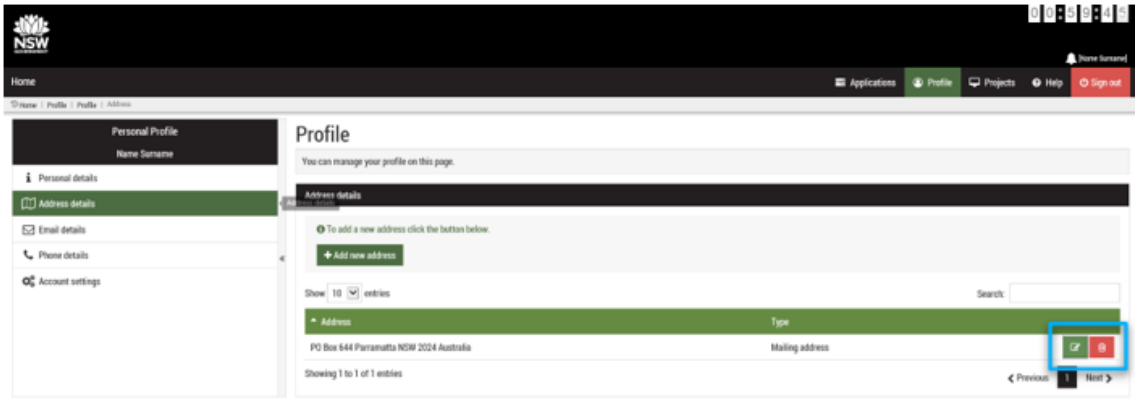


Figure 24 **Edit or delete details in the address details section**

You can progress to the next category by clicking **Next** on the bottom right of the screen or by clicking on the desired category on the navigation column to the left of the screen.

3.5.3 Email details

Through the registration process, your email will have been automatically added as your preferred email.

Click on **+ Add new email address** if you would like to add additional emails and **Save**.

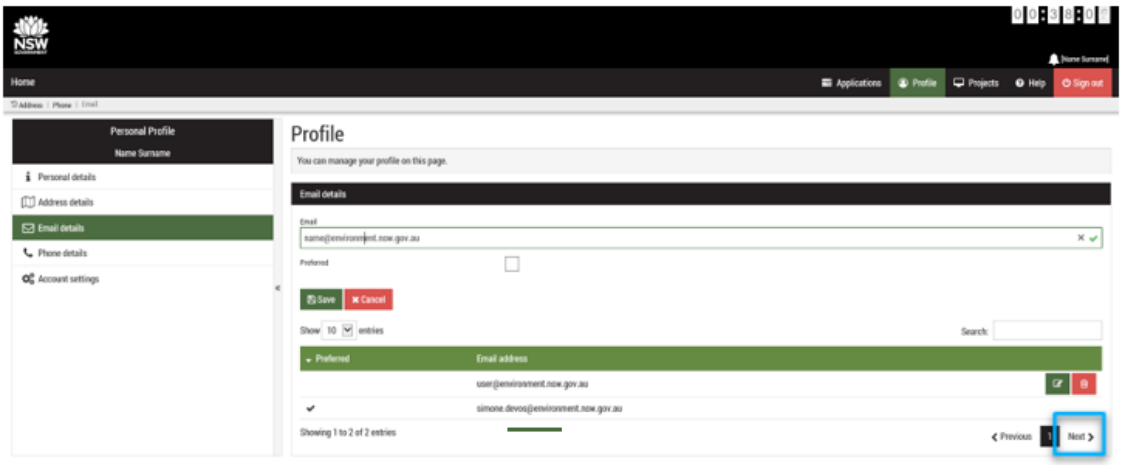


Figure 25 **Email details section**

Click **Next** to progress to **Phone details** or click on **Phone details** on the navigation column on the left of the screen.

3.5.4 Phone details

Click on **+ Add new phone number**.

Enter the relevant phone details and select the correct phone type from the drop-down box. Tick the **preferred phone** box if it's your preferred contact phone number.

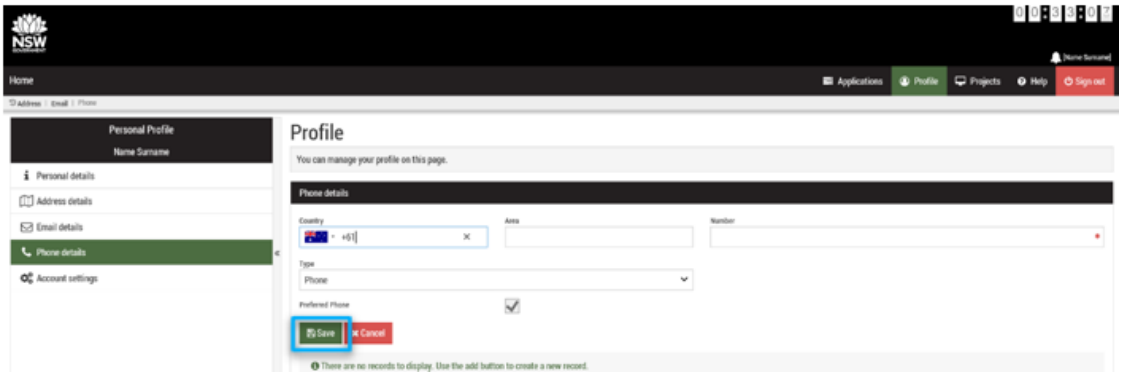


Figure 26 Phone details section

Click on **Save** and click on **+ Add new phone number** if you would like to add additional phone numbers.

This is the final section you are required to complete to set up your profile.

Once the four profile categories have been completed, you can return to the home page. Click on **Home** on the GMS header toolbar.

Figure 27 Home icon/button on GMS header toolbar

3.5.5 Account settings

This category gives the user the ability to change their username, password and delete their account.

Ensure that anything you are working on is saved before you amend any of your account settings, as unsaved information may be lost.

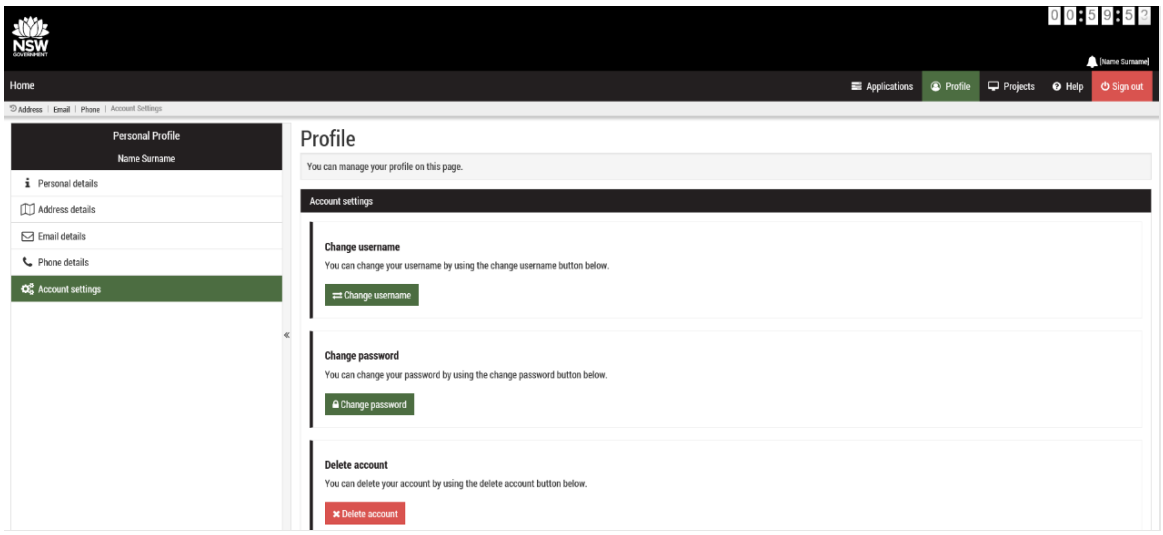


Figure 28 Account settings

3.5.6 Change username

Click on **Change username** to open the Change username screen. You will be asked to enter your password for verification and enter your desired new username (email). Once you save the change you will be logged out and an email with further instructions will be sent to your email address.

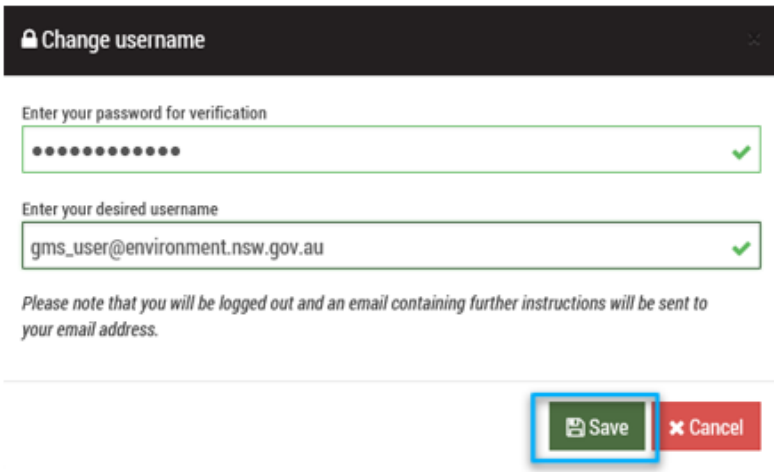


Figure 29 **The Change username (email) screen**

3.5.7 Change password

Click on the **Change password** button to open the Change password screen. You will be asked to enter your current password for verification and then to enter your new password. You are required to enter the new email address a second time for verification. Click **Save**.

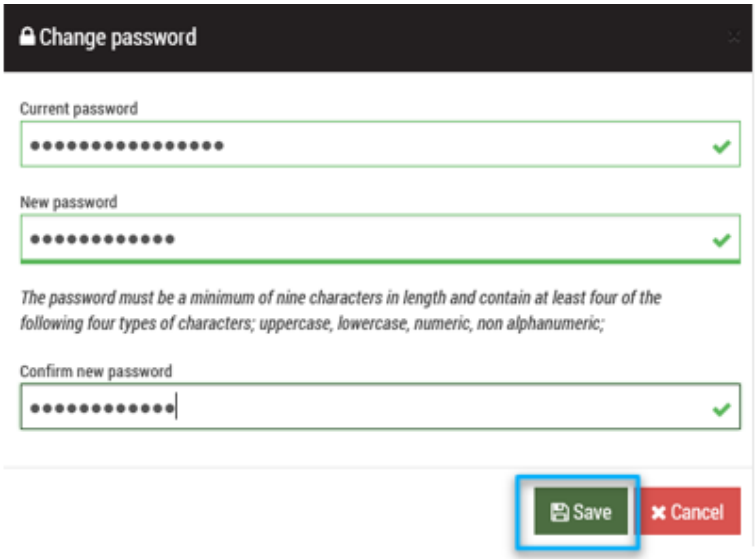


Figure 30 **The Change password screen**

3.5.8 Delete account

Important – Deleting your account cannot be undone. If you no longer wish to have a GMS account, click on **Delete account** and enter your password to confirm you wish to delete the account. Click **Save**.

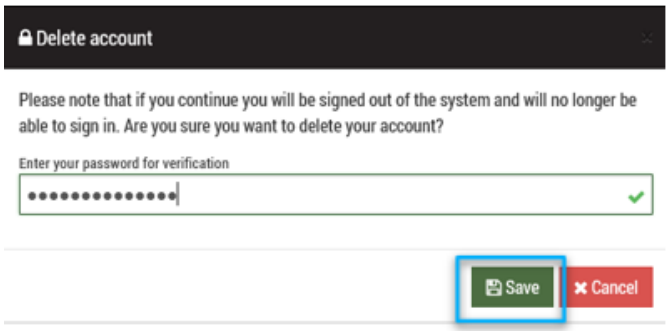


Figure 31 The Delete account screen

4. Applications

There are several locations you can begin the application process. You can directly apply to a program from the **Home** page (Figure 32). Alternately, by navigating to the **Application** section from the page header, you can create a new application via the **+ New application** button (Figure 33).

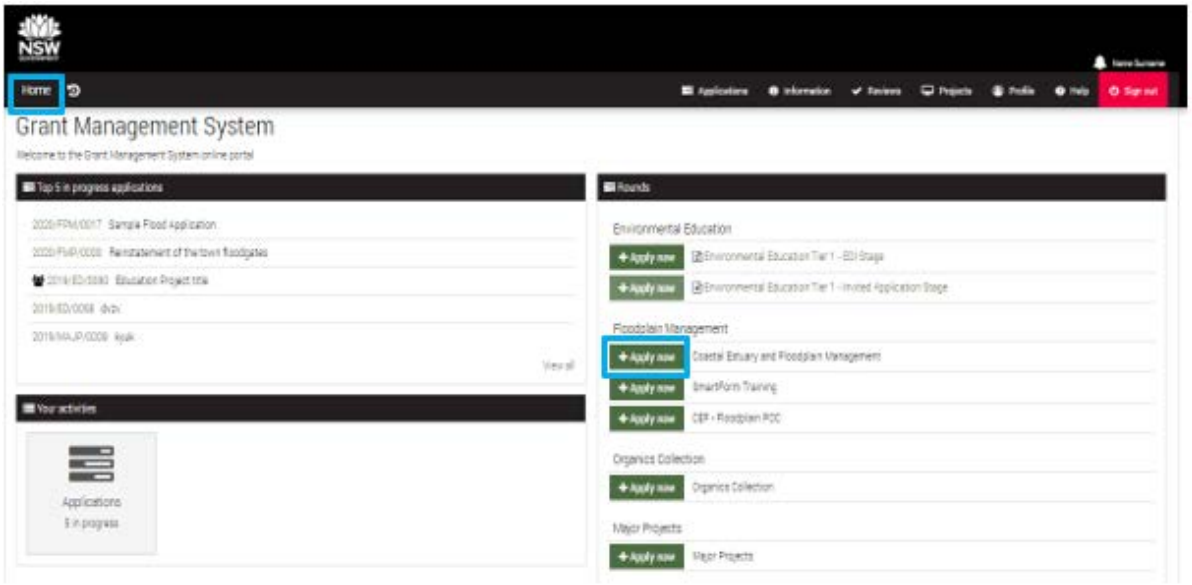


Figure 32 Commence new application from Home page

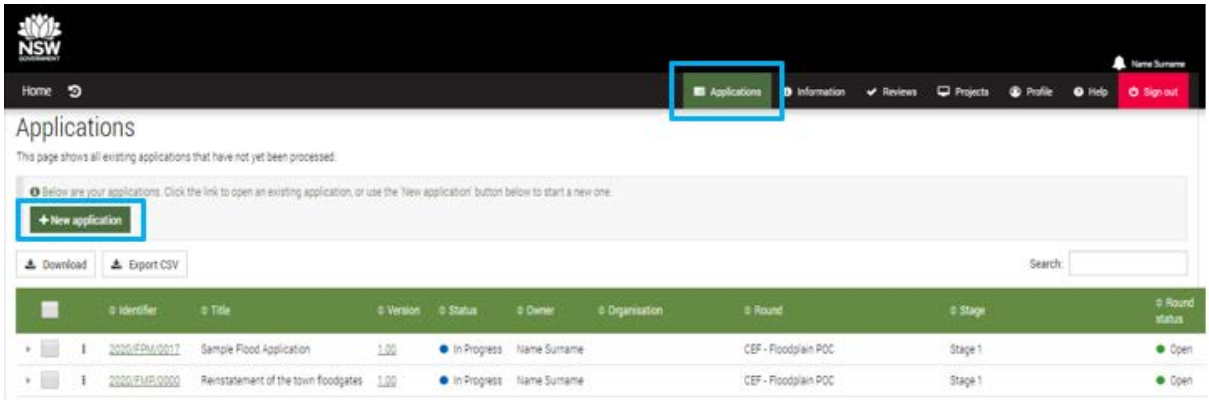


Figure 33 Commence new application from Applications page

Keep in mind that there are word limits placed on the application text boxes. There will be a words remaining limit given at the top of the text box and this will reduce as you type.

For the purpose of guiding you through the application process, we will begin from the Applications page, where you can click directly on **+ New application** button for any new applications (see Figure 33 above).

All new applications, whether they are expressions of interest (EOI) or full applications, should be created via the **+ New application** button. The Program title will identify what application stage or program you are applying under.

The GMS will navigate you through the application process. Once you commence the application, the menu on the left of the screen will change slightly. You will notice that as you

enter information in each category, you will get a green tick if the information meets the system and program requirements and a red cross if there is an error. Each category will need to be marked with a green tick before you can submit the application.

Please note that although the GMS will autosave as you progress through the application, it is recommended that you manually save the application at regular intervals to ensure information is not lost. You will be able to access your application and make changes right up until you complete the declaration/authorisation and submit the application. If you happen to need to make changes to a submitted application before the closing date and time, please contact us. See *Contact information* at the back of this document for details.

The save button Save is accessible on the right-hand side of the screen as you progress through the application. The following screen will confirm you have successfully saved any changes.

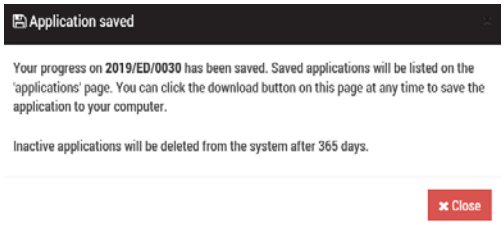


Figure 34 Application saved screen

If the GMS has been idle for an extended period (approximately 60 minutes) you will automatically be logged out. You will need to log back into to continue. It is recommended to save at regular intervals to avoid potential loss of information due to being logged out due to inactivity.

4.1 New application for funding

Keep an eye out for the **Help** icon which will assist you with some information on specific questions in the application.

Click on **+ New application** and a screen will pop-up with a list of programs that are open for grant submissions.

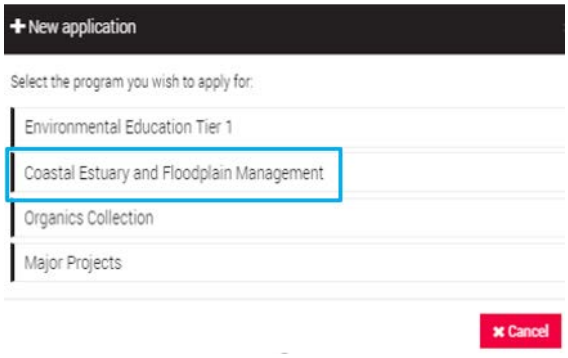


Figure 35 Select grant program for new application

Click on the program you wish to apply for and it will automatically take you to the **Name application** screen. Enter a project title for your application and if you have a green tick, click on the **Done** button.

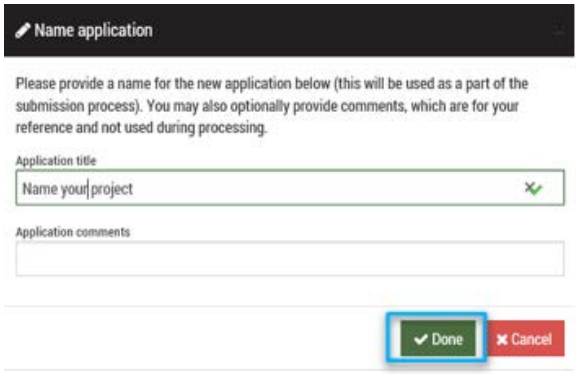


Figure 36 Provide project title for new application

You will have been assigned an identifier/project reference number (e.g. 2020/ED/0041, 2021/FPM/0005). This is known in the GMS as the identifier and this reference number should be used in any correspondence with the Department.

The application menu is on the left of the screen and the categories will vary depending on the program you are applying under. Each category will need to have a green tick before you will be able to submit the application. The application must be submitted by completing the declaration/authorisation step by the closing date and time, or it will not be assessed.

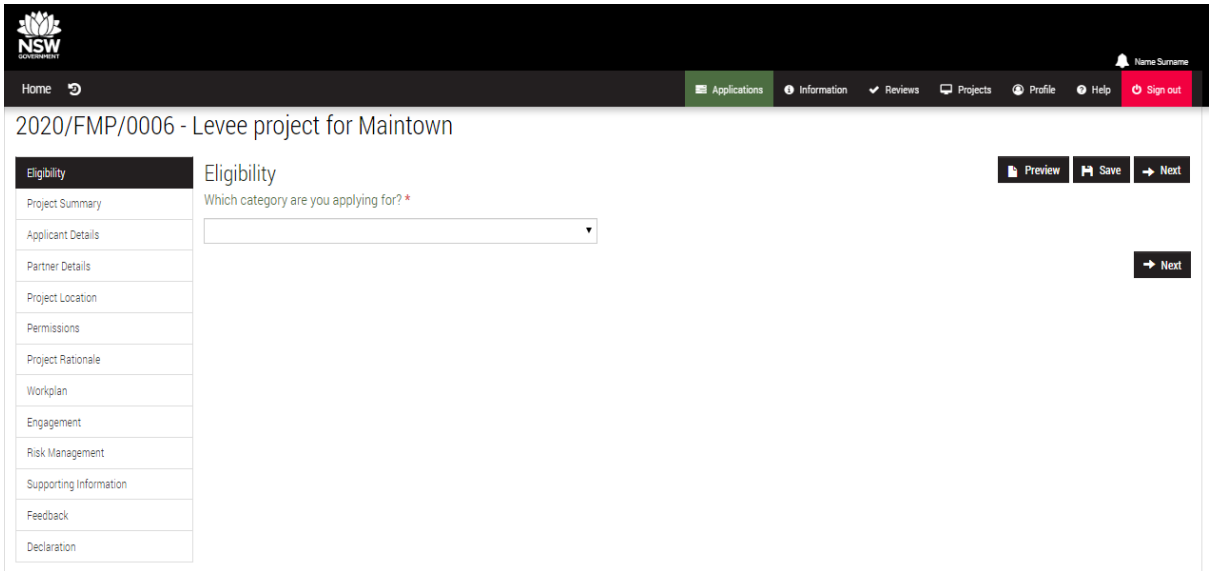


Figure 37 Example of an application menu

We recommend you download a blank copy of your application to pre-plan your answers prior to filling in the details online. You can download your application from the **Application** page. See section **Download application documentation** below.

Read the text and answer the questions in each category. Click on the **Next page** button to progress through the menu items until you reach **Declaration/Authorisation**.

Documentation specific to the program you are applying under will be available on the website to aid you in completing your application.

Figure 38 Next page button(s)

4.1.1 Declaration/Authorisation

This is the final step in submitting your application. If each category has a green tick, you will be able to submit your application.

Please be aware that once a program has closed, you will not be able to make any changes to a submitted application. Please ensure you have checked each category before lodging.

Fill in the details (name, position, etc) of the relevant officer that is eligible to commit your organisation to the project and tick the declaration/authorisation check-box. In some programs, this can also appear as a yes/no option. It is only after you tick the declaration/authorisation box that the **Submit** button will appear.

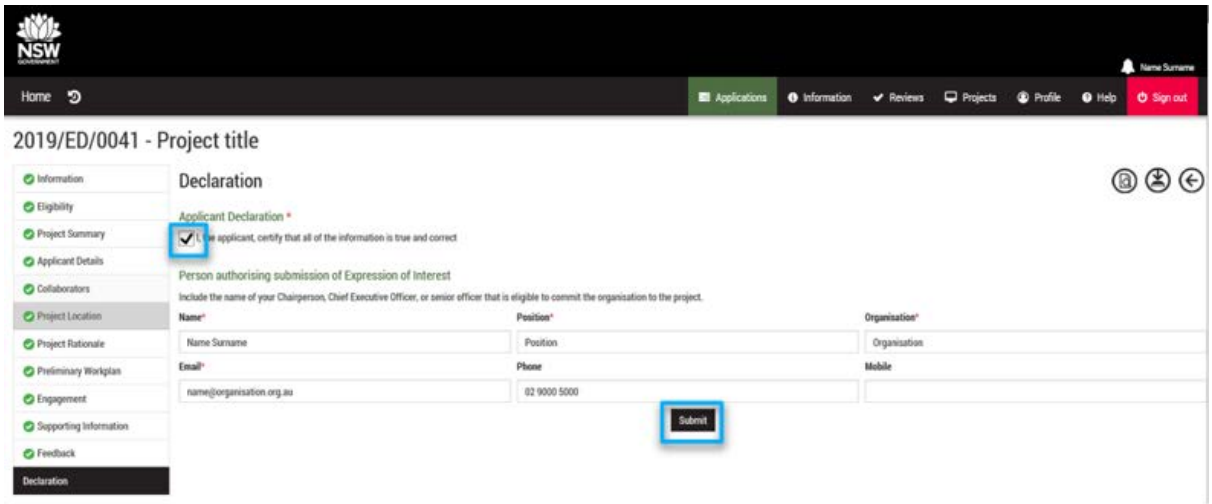


Figure 39 Complete Declaration to submit application

Click **Submit** and the GMS will prepare your application documentation. Please stay on the page while this process occurs. It will only take a short time.

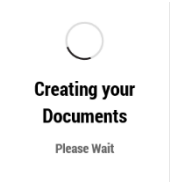


Figure 40 GMS creating submitted application documentation

The **Application submission** screen will appear. Click **Next**.

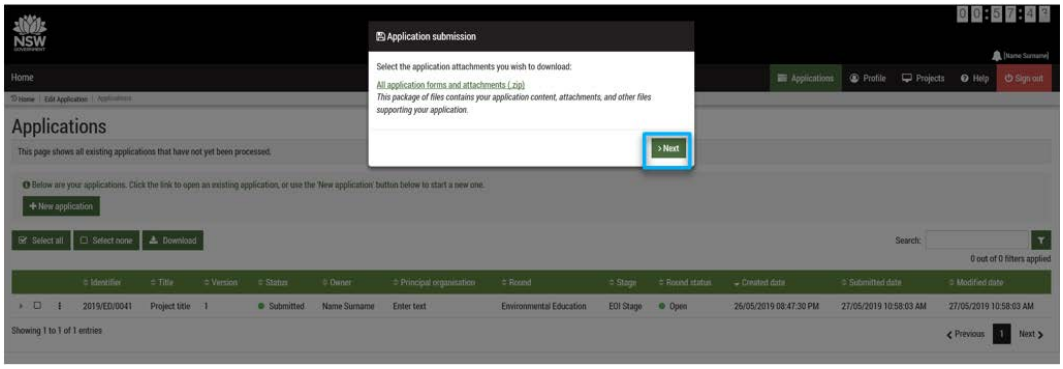


Figure 41 Application submission screen

After clicking on **Next**, a screen will appear to advise you that your application has been successfully submitted. Click on the **Close** button and you will be taken to the **Applications** page.

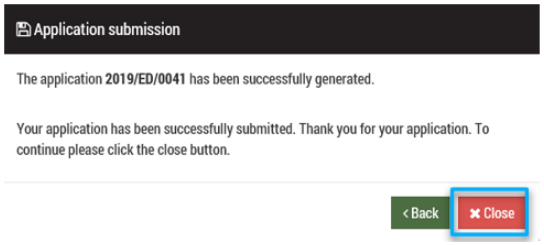


Figure 42 Application successfully submitted screen

4.2 Managing your applications

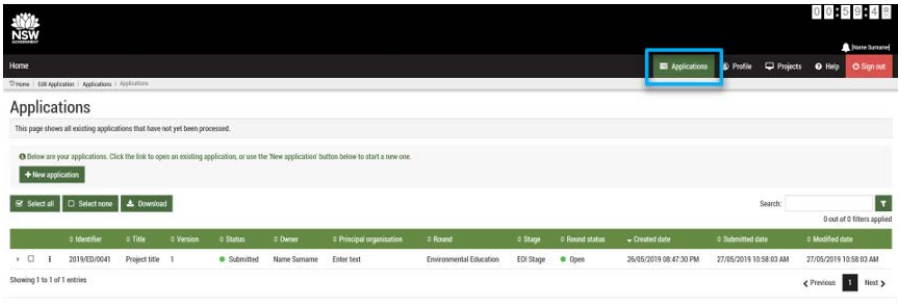


Figure 43 Application home page

On the **Application** page, you can view all applications that are pending submission or final assessment. In this section of the GMS you are able to:

- monitor the status of your submitted application
- begin a new application by clicking on the **+ New application** button and follow the process previously explained in the manual section *New application for funding*
- download copies of your applications
- modify applications that are still in progress
- delete or withdraw applications
- invite other users to view and/or edit the application

Most of the information in your submitted application can be edited by clicking on the applications identifier/reference number (e.g. 2020/FMP/0042), either on the **Home** or **Application** pages. There are additional tools under **Options** which vary depending on the status of your application.

⋮ Click on the three dots on the left of the identifier/project reference number to view the available options. These options are shown in two screenshots below (Application in progress [Figure 45] and Submitted application [Figure 46]) and detailed on the following pages.

4.2.1 Download application documentation

To download a copy of your application, tick the application you wish to download and click on **Download**. The **Download application documents** screen will appear. Select your option and click on **Download** then follow the computer's prompts to save the .zip folder.

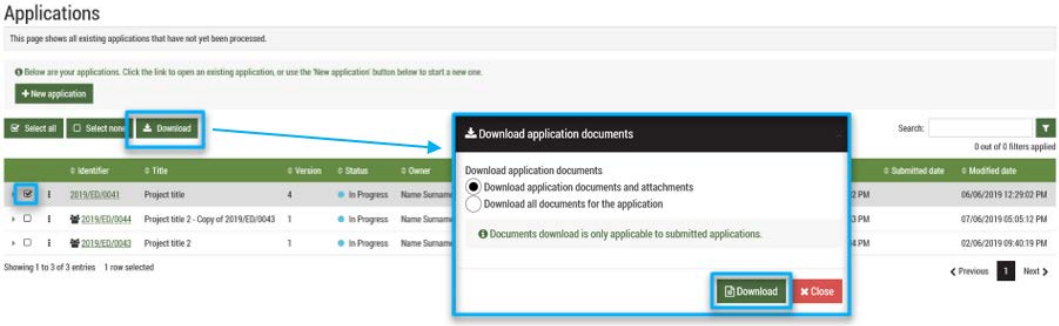


Figure 44 Download application documentation

Application in progress

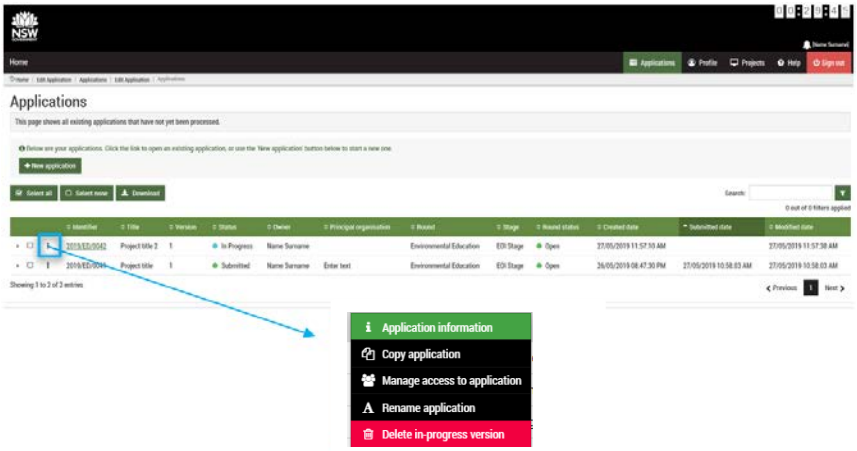


Figure 45 Application (in progress) options

Submitted application

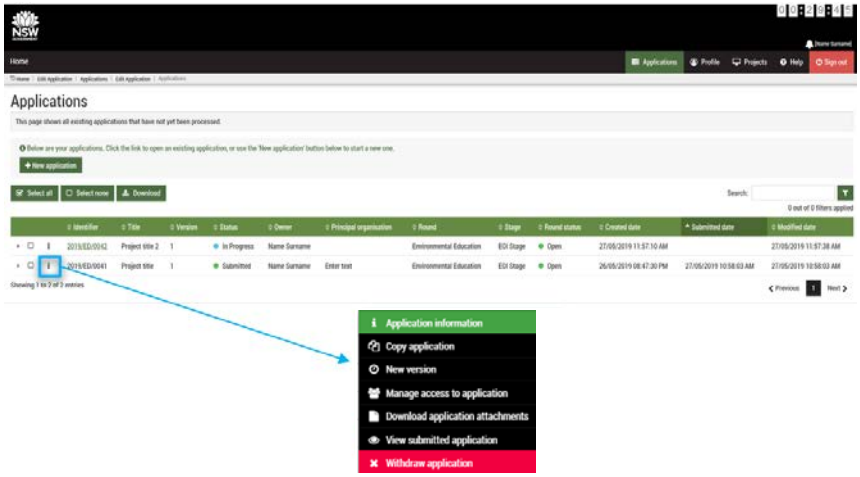


Figure 46 Application (submitted) options

All of the following options in this section of the manual are accessed by first clicking the Options button (⋮) to the left of the application/project identifier.

4.2.2 Application information

Provides a snapshot of the status of your application, including the key information such as project title, reference number and who you have shared the document. See the screenshot below for an example of the type of information available.

The **Application information menu** on the left of the screen provides more information on the application.

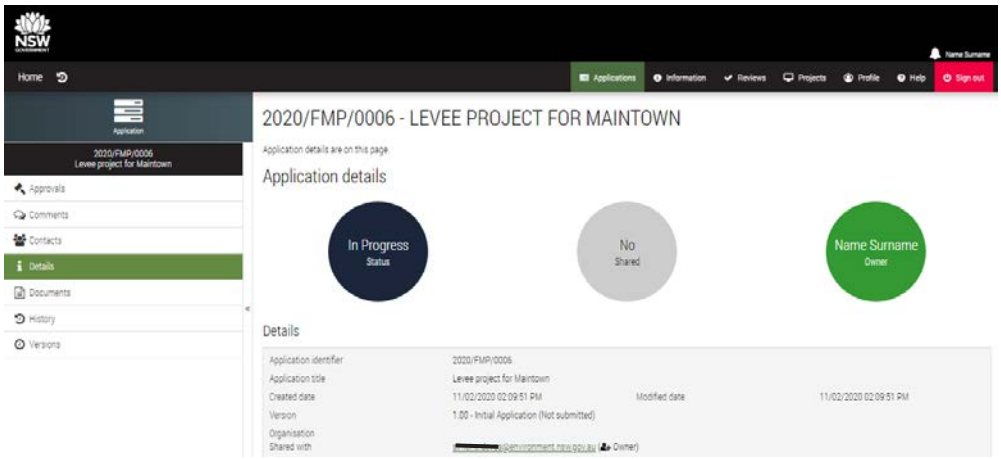


Figure 47 Application Information home page

Approvals: Will contain any information relating to the outcome of your application.

Comments: Will contain any comments you have added to your application. You may also enter comments directly by clicking on **+ Add comment**.

Figure 48 Application comments in the Application Information section

Contacts: A quick reference guide for the project contacts the user has assigned/invited.

Figure 49 Application contacts summary in Application Information section

Details: This is the home page for the application information with the snapshot summary of the application as noted above.

Documents: All attachments submitted with the application can be viewed and downloaded from this section.

History: A running sheet of the progress of your application, also referred to as an audit trail.

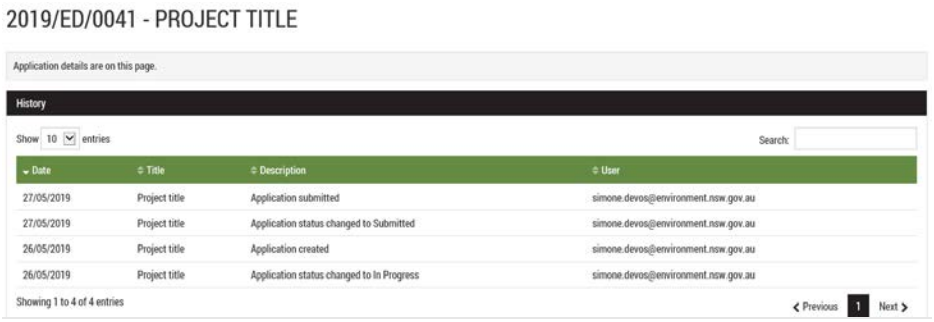


Figure 50 Application comments in the Application Information section

4.2.3 Copy application

You can copy an application for a quick way to commence a new application (if appropriate).

To copy an application, start on the **Applications** page. Click the options button (⋮) next to the desired application and select **Copy application**.

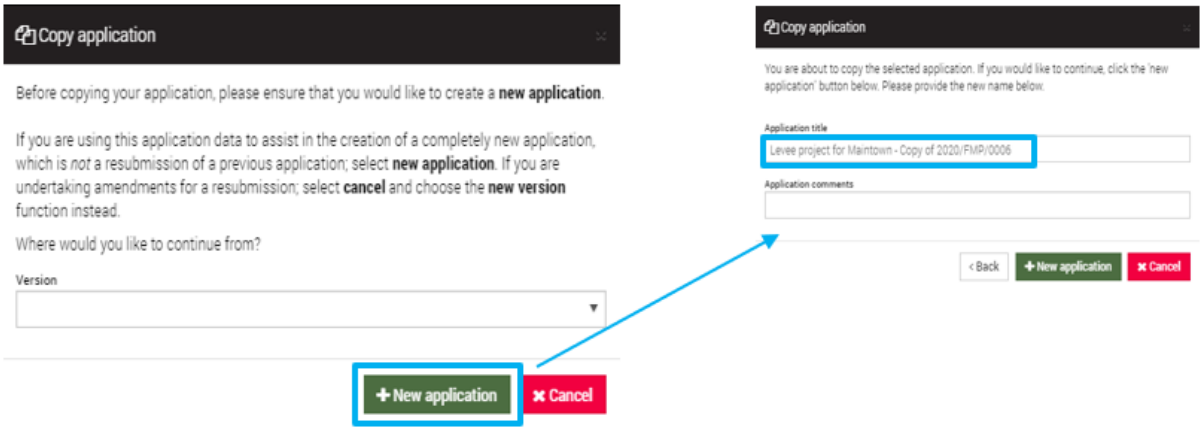


Figure 51 Copy application screen

The new application title will begin with the project title and then ‘Copy of’ before the identifier. This title can be amended and will be issued its own unique identifier/project reference number as a new application.

4.2.4 New Version

If you need to make amendments and resubmit an application, you can do so by selecting **New Version** and clicking on **New Version**. Once you confirm that you wish to edit a submitted application, the GMS will take you back to the Applications page and your application will now be listed as In Progress rather than Submitted. Please note that once the program closes for submission, you will not be able to make any amendments.

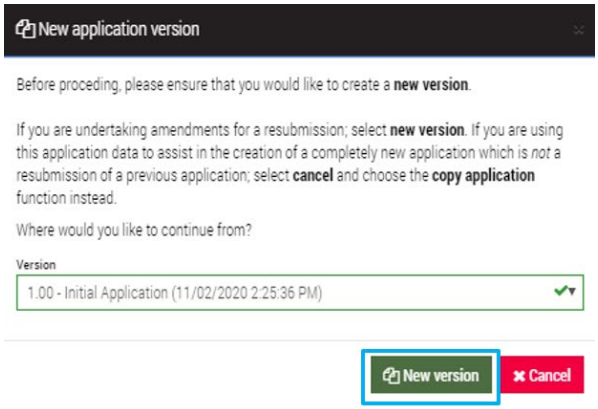


Figure 52 **New Version screen**

4.2.5 Rename application

In this section, you can amend the project title. Simply click on the **Rename application** option and type the desired name in the pop-up screen, then click on **Rename**.

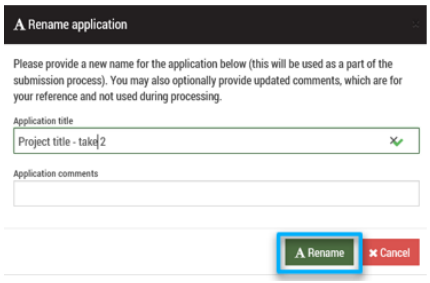


Figure 53 **Rename application screen**

4.2.6 Manage access to application

This is a quick method to invite others to view or edit the application. You can choose the level of access they will have to this application, from **invite only**, **share with view access** or **share with edit access**.

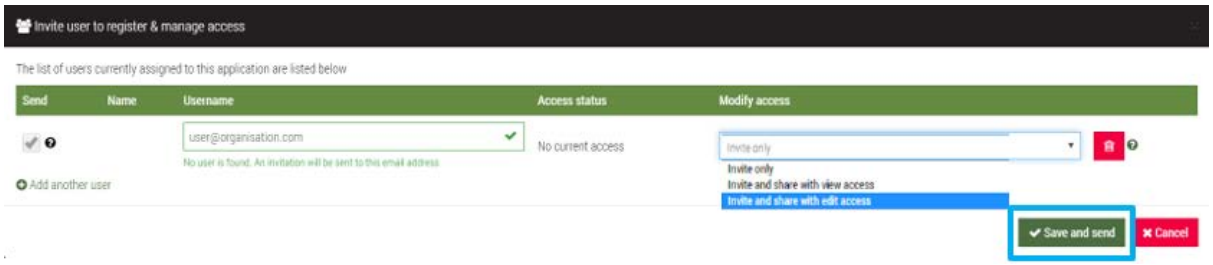


Figure 54 **Manage access screen**

Once the invitee accepts your invite and registers, you will receive a notification.

4.2.7 Download application attachments (submitted applications only)

For any submitted application, select **Download application attachments** and the following pop-up screen will appear. Click on the Green text to download all attachments in a .zip file. This includes the application, attachments and all supporting documentation.

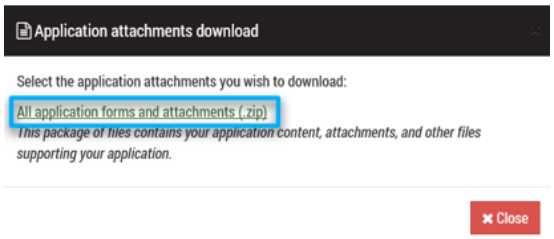


Figure 55 Download application screen

4.2.8 View submitted application

Select this option to be taken to an online (un-editable) version of your submitted application. The format will resemble the application process, but the user will only be able to navigate through the categories to view the information and will not be able to make any edits.

4.2.9 Delete in-progress version (in-progress applications only)

Should you no longer wish to proceed with the application, you can delete the application from this location. Click on **Delete in-progress version** and **Delete**. Please note once you click on **Delete**, you cannot undo the action.

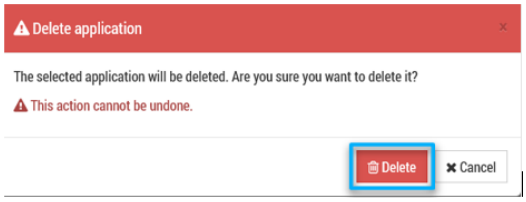


Figure 56 Delete application screen

4.2.10 Withdraw application (submitted applications only)

To withdraw a submitted application, you can click on **Withdraw application** and a pop-up screen will appear. Click on the **Withdraw application** button. As with the Delete application option, please be aware that you cannot undo this action.

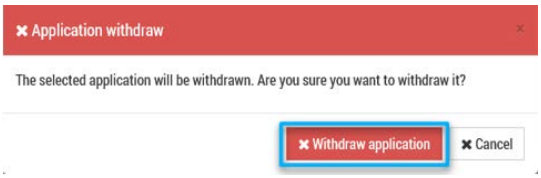


Figure 57 Withdraw application screen

5. Contact information

This is a new purpose-built system, designed to improve your experience in applying for grant funding. However, we anticipate there may be some teething issues, so please do not hesitate in contacting us for assistance. You will find the Program Guidelines on our program webpages to help you answer each question as you complete your application in the GMS.

Department of Planning, Industry and Environment Grants Branch

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Phone 02 9895 6494
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Email: coastalestuary.floodgrants@environment.nsw.gov.au

Environmental Trust
Phone: 02 8837 6093 (the information line is open between 9am and 5pm Monday to Friday)
Postal address: PO Box 644, Parramatta NSW 2124
Email: info@environmentaltrust.nsw.gov.au