NAVIGATING ZOOMGRANTS AND SETTING UP NEW ZOOMGRANTS ACCOUNTS

APPLICANT INSTRUCTIONS

REVISED: 01/04/2018

These instructions are intended for new Funding Opportunities released by the Division of Criminal Justice. NOTE: Each Funding Opportunity will have detailed Program instructions associated with Completing the Application which are contained in the Library for each Program. These Navigation instructions supplement but do not replace Program specific instructions.

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ZoomGrants Account Structure

Grantees will log into ZoomGrants as either an *Account Owner* or a *Collaborator*. Additional Contacts may be added for communication purposes only.

Account Owners

Accounts are linked to a singular email address (*Account Owner*). There is no agency account in ZG; there are only individual accounts.

- The userID is the email address. There is **no agency account** in ZG; there are **only individual accounts** and the userID is an email address.
- The Account Owner must add Collaborators and Additional Contacts at the Application level for each project.
- Individual accounts belong to the Grantee and are not specific to DCJ or even the State of
 Colorado. A grantee that has a ZG account may use that account to apply for any ZG opportunity
 regardless of whom the funder is and where the funder is located. However, an individual
 account may NOT be used as an administrator account and a Grantee account (i.e. if you give
 out grants and manage those grants with ZoomGrants, you may not use that same
 account/email address to apply for grants as a grantee).

Only the Account Owner may:

- Add, delete, modify Collaborators
- Create, delete or archive an Application
- Submit an Application
- An Account Owner may be changed to another email address (new Account Owner) at any time by the current Account Owner or by Zoomgrants staff upon request.

Collaborators

The Account Owner adds Collaborators on a project by project basis. The Account Owner must ensure that all the appropriate Project Officials and DCJ staff are added as Collaborators to each grant, and given the proper permissions.

- Collaborators cannot submit, archive, or delete an application.
- *Collaborator*s can update a grant project, complete reports, and upload documents for a grant or a project if given the proper permissions.

A *Collaborator* may be given access to:

- Application: Edit the following tabs: 1) Summary, 2) Organizational Details, 3)
 Questions/Statement of Work, 4) Tables. Note: Once an application is submitted it cannot be edited unless it has been open for editing by a DCJ Grant Manager.
- **Report**: Access the Report tab (Narrative Report CVS-2, Financial Report 1-A, Program Income Report 1-B).
- Financial: Access payment requests (Payment Request Form 3).
- Grant Agreement: Access the grant agreement tab. This tab contains the Reporting Schedule, a
 copy of your current grant agreement, and any additional instructions provided by your DCJ
 Grant Manager.

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NOTE: When applying for a new funding opportunity the *Account Owner* must add DCJ Staff as *Collaborators*. This allows DCJ staff to provide more comprehensive technical support. Instructions will provided within ZoomGrants.

Additional Contacts

The Account Owner adds Additional Contacts on a project by project basis. Additional Contacts may also be updated by Collaborators and DCJ Staff.

- Additional Contacts will receive any email Notification generated out of the ZG system.
 Notifications may include award letters, funding recommendations, and report late notices.
- Additional Contacts do not have access rights to the grant unless they are <u>also</u> included as a Collaborator.

NOTE: A generic Division of Criminal Justice email address will be added as an additional contact on each grant in ZG. Do not delete this email address.

Log into ZoomGrants

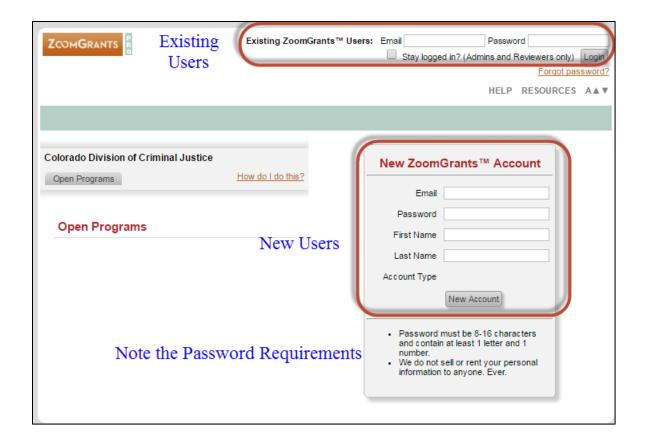
- Account Owners and Collaborators log in using different URLs. Only the Account Owner can create a new Application.
- You may use any up to date browser (Internet Explorer, Mozilla Firefox, Safari, etc.). Chrome is preferred.

Account Owners - Login

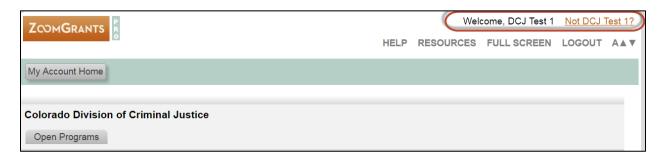
Account Owner Login: https://zoomgrants.com/gprop.asp?donorid=2225

- If you are an existing DCJ Grantee currently using ZoomGrants, the Account Owner should log in using current credentials. Do NOT create a new account.
- If you are new to ZoomGrants create a *New ZoomGrants Account*. The email address you enter will be the email address associated with the *Account Owner*. **DO NOT** create an account here if you are a *Collaborator*.
- Once you enter the new Account Owner Email, Password, First Name, Last Name and click on New Account, you will be logged in.

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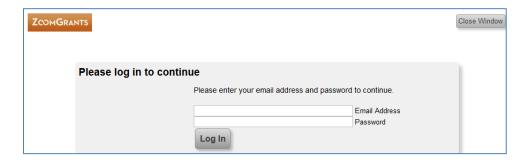


1) Confirm that you are logged in:



Collaborators - Login

Collaborator Login: http://www.zoomgrants.com/invitations.asp

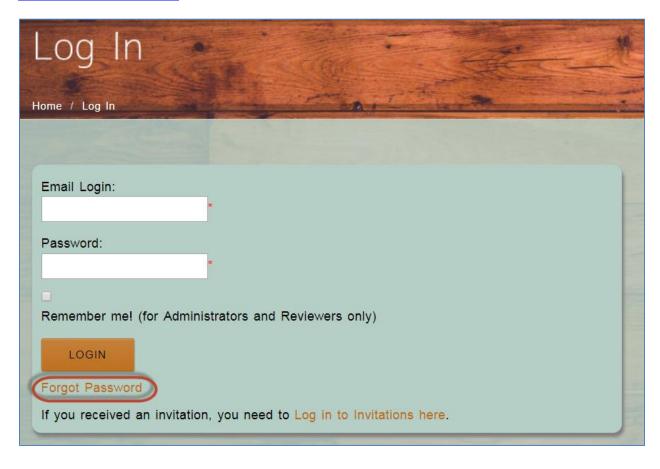


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Forgotten or Unknown Password

If you are an *Account Owner* and have forgotten your password or if you have been invited as a *Collaborator* and do not know your password, click on the Forgot Password option on the main **ZoomGrants.com** page.

ZoomGrants requires all users to maintain a Security Profile to aid in the retrieval of passwords. If you forget your password, answering those three questions correctly will allow you to reset your password. If you have yet to set up your Security Profile, you will receive your password in an email from Notices@ZoomGrants.com.

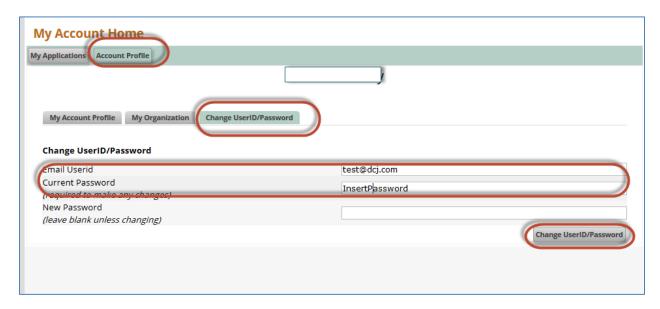


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Change in Account Owner

If there is a change in personnel and the *Account Owner* needs to be changed, either the current *Account Owner* may change it or the Grantee must contact ZoomGrants at

Questions@ZoomGrants.com. DCJ does NOT have access to change Account Owners.

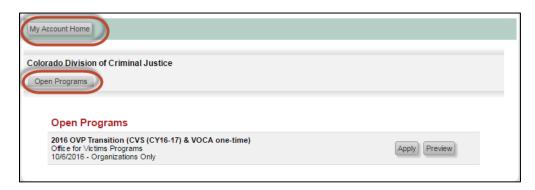


Enter the new *Email UserId* and the current password, then click *Change UserID/Password*. Once changed you will need to log out and then log back in using the new *Email UserId*.

Home Page

The Home Page contains My Account Home and Open Programs.

- My Account Home: Contains existing Applications and the Account Profile information associated with the user.
- **Open Programs**: Open Programs will automatically be visible once you log in and it contains only open Programs that are accepting applications.
 - Note: Programs = Funding Opportunity.



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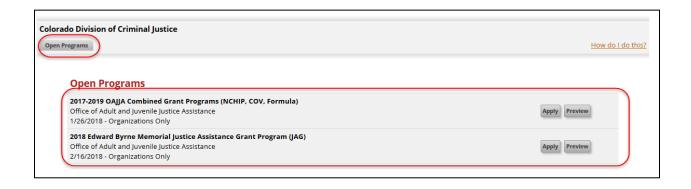
Creating a New Application

Open Programs

Identify the appropriate Open Program (Funding Opportunity) for which you will submit an application. Note: Each Program will have detailed instructions associated with the program and are contained in the **Library** for each Program.

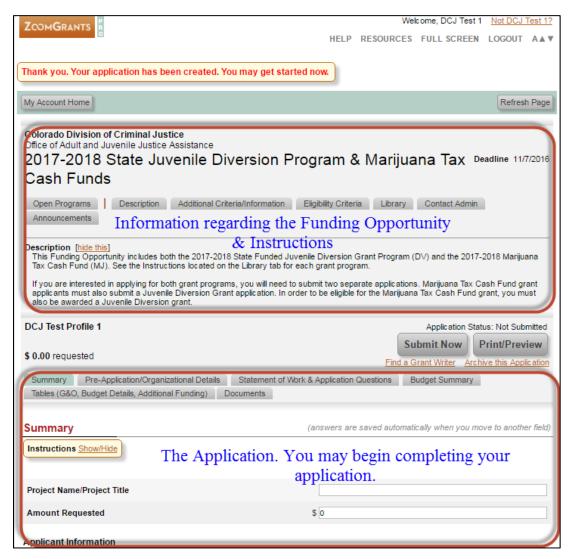
Creating an Application/Viewing the Program Details

You may access the application by either selecting Preview or Apply.



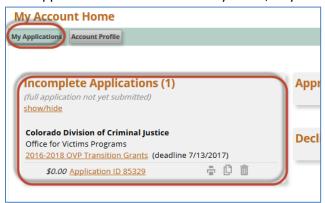
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Apply: You may select **Apply** to view the Application, the associated Program information (attached announcement, library, funding opportunity details, etc.), and begin an application.



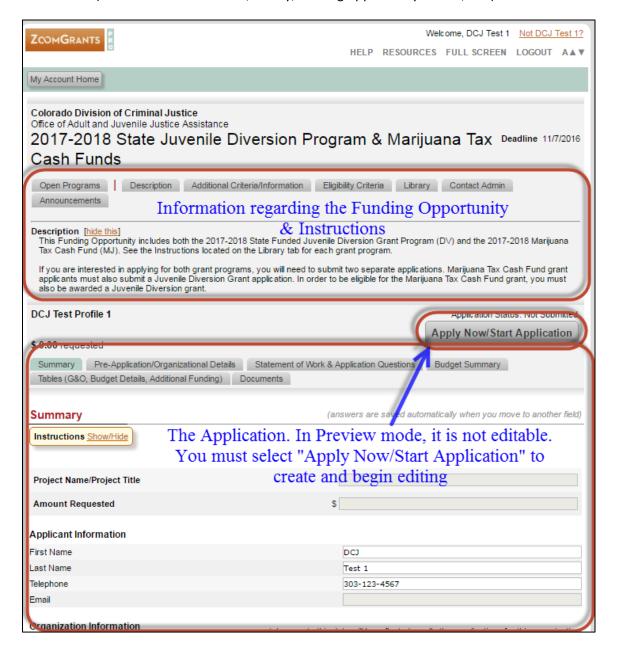
Once you click Apply, you will have created an Application, even if you don't complete any fields.

Your application will be automatically saved, so you may exit the application and return at any time.



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Preview: You may select **Preview** to view the Application and the associated funding opportunity information (attached announcement, library, funding opportunity details, etc.).



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Navigating the Application

The Application is broken into two sets of tabs.

- Program/Funding Opportunity Tabs: Visible from within any application specific to a particular Funding Opportunity.
- Application Tabs: Specific to each individual Application

Program/Funding Opportunity Tabs

The Program tabs are visible at the top of every application and consist of the following tabs:

- Open Programs: Exits the Application and returns to the Home Page/Open Programs.
- **Description:** Details regarding the Funding Opportunity.
- Additional Criteria/Information: Details regarding the Funding Opportunity.
- Eligibility Criteria: Details regarding the Funding Opportunity.
- **Library:** Contains instructions and other downloadable documents/forms.
- **Contact Admin:** Launches an email window addressed to DCJ staff through your computer's default email browser. The default email browser is a computer setting on your computer.
- Announcements: Contains mass notifications from DCJ.



Thoroughly review all the of Program details including eligibility and instructions before continuing onto the application.

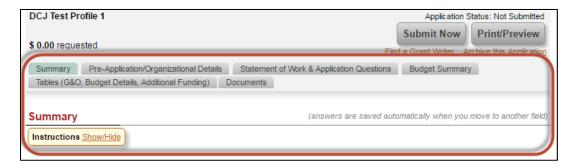
Application Tabs

The Application tab structure and functions are consistent between all Applications, but may have different naming conventions between Programs/Funding Opportunities.

- **Summary**: Contains basic information about the applicant and the project/application. This is consistent between programs.
- **Organizational Details:** Contains information about the applicant legal entity information. This is consistent between programs.
- Statement of Work & Application Questions: Contains questions unique to each program.
- Budget Summary: Contains a basic budget overview. This is consistent between programs.

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- Tables (G&O, Budget Details, Additional Funding): Contains various tables such as Goals &
 Objective, Budget Details and other program specific questions.
- **Documents:** Location for the uploading of documents by the applicant/grantee.
- Grant Agreement: Only visible if the application is awarded.
- **Financial**: Only visible if the application is awarded.
- **Report**: Only visible if the application is awarded.
- **Report Totals**: Only visible if the application is awarded.

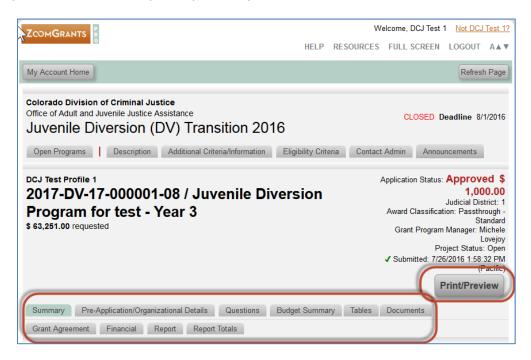


Completing an Application

Each Application contains header information between the Program tabs and Application tabs. Your application will be automatically saved. You may exit the application and return at any time.

Note: See the program/funding opportunity instructions in the *Library* for specific instructions for each program.

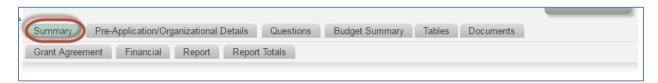
Print/Preview: You can view all project information in one document by clicking Print/Preview. You may save this version as a pdf on your computer.



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Summary

Contains basic information about the applicant and the project/application. This is consistent between programs.



Project Number/Title and Amount

Project Name/Project Title	2017-DV-17-000001-08 / Juvenile Diversion Program for te
Amount Requested	\$ 63251

Field	Content	Notes
Project Name/Project Title	Project Number and Project Name	Enter the Project title. At a later time
		DCJ, as a collaborator, will update the
		project title with the project/grant
		number.
Amount Requested	Current Award Amount	Enter the total amount of funds
		requested. This field may be updated
		any time prior to submitting the
		application. It does not automatically
		calculate and there isn't a check to
		compare this figure against the budget
		details contained within other sections
		of the application.

Applicant Information

Applicant information contains information about the individual *Account Own*er. First Name, Last Name, Telephone, and Email are linked to the *Account Profile* and ALL other Applications associated with the account. If any of these fields is updated it will update that field in *My Account Profile* and all other Applications belonging to the *Account Owner*.

New Users: These fields will be blank. Update the information here and it will populate *My Account Profile* and will populate in future applications.

Continuation Users: These fields will already be populated. Any changes made here will change the fields in the *My Account Profile* and all other Applications belonging to the *Account Owner*.



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Field	Content	Notes
First Name	Information associated with the	Any changes here will change the
	UserID	information in My Account Profile
		and all other Applications belonging
		to the Account Owner.
Last Name	Information associated with the	и
	UserID	
Telephone	Information associated with the	и
	UserID	
Email	UserID of the account	Email associated with the account. It
		can only be changed within the My
		Account Profile in Change
		UserID/Password

Organization Information

Organization information contains information about the agency associated with the account. All of the fields except for the SAM/DUNS Expiration are linked to *My Account Profile* and all other Applications belonging to the *Account Owner*. If any of these fields is updated or changed it will update that field in *My Account Profile* and all other Applications belonging to the *Account Owner*.

The SAM/DUNS Expiration is not in *My Account Profile*, but it is linked to all other Applications associated with all other Applications belonging to the *Account Owner*.

New Users: These fields will be blank. Update the information here and it will populate *My Account Profile* and will populate in future applications.

Continuation Users: These fields will already be populated. Any changes made here will change the fields in the *My Account Profile* and all other Applications belonging to the *Account Owner*.

- DCJ goes through an extensive validation process regarding Agency information. This includes verifying name consistency with the Colorado Secretary of State, CORE validation, etc.
- An inconsistent name could slow or even halt the processing of grant agreements and payments.
- If you have an existing approved project, please do not update these fields without discussing this with your DCJ Grant Manager.

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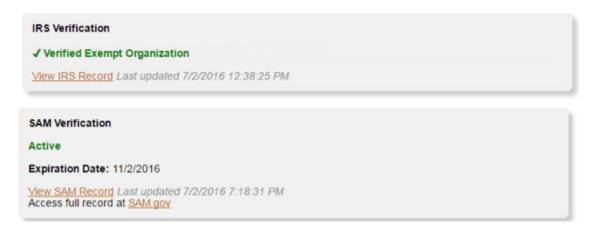
Organization Information	(cha	nges to this data will be refle	ected on all other	applications for this	s organizatio
Applicant Agency Name					
Address 1					
Address 2					
City					
State/Province					Non-US
ZIP+4/Postal Code					
Country				United States	
Telephone					
Fax					
Website					
EIN (XX-XXXXXXX)					
DUNS Number			XXXXXXXX		
CEO/Executive Director (if NA, enter Si	gnature Authority)				
First Name					
Last Name					
Title					
Email					

Field	Content	Notes
Applicant Agency Name	Name that the agency is doing	Any changes here will change the
	business as.	information in My Organization and all
	If you have a parent entity (Legal	other Applications belonging to the
	Entity, this information is entered on	Account Owner
	the Organizational Details tab.	
Address 1	Address associated with this agency	u
Address 2	u	и
City	u	и
State/Province	u	и
ZIP+4/Postal Code	u	u
Country	и	u
Telephone	Primary contact for this agency	и
Fax	Primary contact for this agency	u
Website	Website for the agency	u
EIN (XX-XXXXXXX)	Tax ID for payment	Editable - this must match the coding in the state financial system. EIN must have the "-" in the number (XX-XXXXXXX) or it won't pass the IRS validation test.
DUNS Number	Federal DUNS number	This field will be validated against SAM.gov
CEO/Executive Director (If NA, enter Signature Authority)		
First Name	List the Executive Director of your	Any changes here will change the
	agency. If you do not have an ED, list	information in My Organization and all
	the Signature Authority information.	other applications in this account
Last Name	и	и
Title	и	u
Email	и	и

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IRS Verification & SAM Verification

This information does not appear immediately, but will appear sometime after you begin your application.



ZoomGrants verifies the status of applicant organizations via the EIN and/or DUNS numbers. Using data released by the federal government, ZoomGrants completes an IRS verification (via each applicant's EIN) and/or a SAM verification (via each applicant's DUNS number) and presents the results for each applicant in the Application Summary tab of their applications.

The federal government releases this data every month, so the IRS and SAM checks are completed once an applicant submits their application and are automatically updated monthly, following the release of the new data.

The IRS verification will only appear in the Application Summary tab of an application if a valid EIN is entered. The SAM verification will only appear in the Application Summary tab on an application if a valid DUNS number is entered.

Contact ZG Tech Support desk – (866) 323-5404 x2, for questions on IRS & SAM verification.

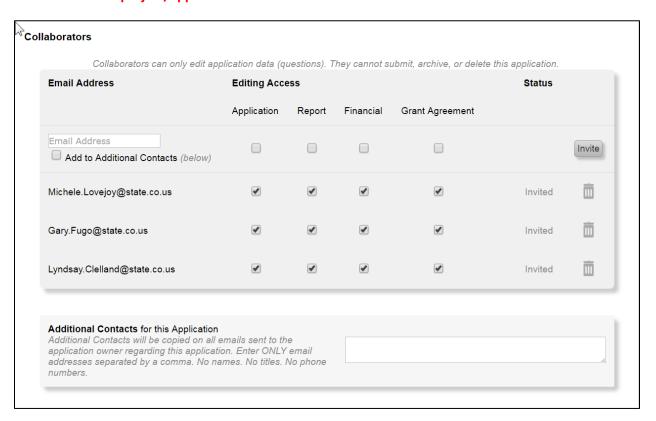
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Adding Collaborators and Additional Contacts

Collaborators

The account is associated with a single *Account Owner*. The collaborator feature allows the applicants (*Account Owners*) to invite others to work on/have access to specific sections of the project. *Collaborators* will not receive communications from ZoomGrants. If you would like a Collaborator to also receive notifications, add the individual to Additional Contacts as well.

Enter that person's email address and decide which sections they can access (the application itself, the reports, or the invoices), then the system sends an email invitation to that person. The invited users can log in at https://zoomGrants.com/Invitations.asp, where they can access all of the applications on which they have been invited to collaborate. Note: Report, Financial, and Grant Agreement boxes are not visible unless the project/application is awarded.

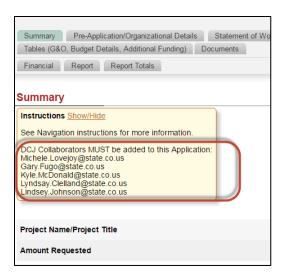


<u>Project/Grant Collaborator</u>: Add other individuals to your project such as the Financial Officer, and others who will work on the post award submissions (payment requests, narrative reports, etc.).

Depending on the editing access that is granted, collaborators can edit the application questions, submit reports, and create and submit invoices. They CANNOT submit, archive, or delete the application.

<u>DCJ Staff Collaborators:</u> You must add DCJ staff as collaborators for each project. See the **Summary Instructions** for each program to determine which DCJ staff collaborators you must add.

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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 spaces. No names. No titles. No phone numbers. Additional contacts do not have access to the project.

Note: DCJ will have a general email address added here for each project. Do not delete.

Organizational Details

Contains information about the applicant legal entity and other programmatic requirements. Often times a grantee will have a Legal Entity Name that is different than Applicant Agency Name and we need to capture both. If you do business under the same name as the legal entity name, then this information will be the same as the *My Organization Information*.

DCJ goes through an extensive validation process regarding Agency information. This includes verifying name consistency with the Colorado Secretary of State, CORE validation, etc. **Discrepancies in legal entity information may delay the start of the award and/or payment processing.**

Once a project has been submitted it cannot be edited unless it is opened for editing by a DCJ grant manager. These fields may be updated by the *Account Owner* or any *Collaborator* that has been given access to the Application.

New Users: Complete this form using your legal entity information and the project officials associated with <u>this</u> project/application.

Continuation Users: Complete this form using your legal entity information and the project officials associated with this project/application. The entity information should match previously approved DCJ project(s) associated with this account, you may copy and paste the information from the approve application to the new one.

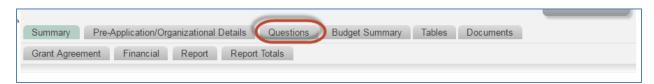
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Questions

This section contains basic project data that will become part of the grant award Statement of Work. See the instructions in the Library for information about each question.

Once a project has been submitted it cannot be edited unless it is opened for editing by a DCJ grant manager. These fields may be updated by the *Account Owner* or any *Collaborator* that has been given access to the *Application*.



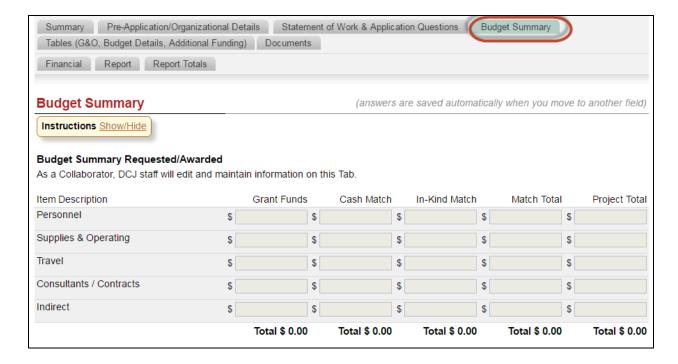
All fields must be completed in order to submit the application. If a field does not apply to you, you must enter "NA" in the field. If a table/grid does not apply to you, you must enter "0" in the first box.

Budget Summary

Contains a basic budget overview and is consistent between programs although **Item Descriptions** may vary from program to program. Once a project has been submitted it cannot be edited unless it is opened for editing by a DCJ grant manager. These fields may be updated by the *Account Owner* or any *Collaborator* that has been given access to the *Application*.

This section is NOT linked to the budget. Budget details that are part of tables 2 and 3 (Personnel: Budget & Budget Narrative Details and Non-Personnel: Budget & Budget Narrative Details) are under the Tables Tab. You must manually update this tab. Be sure the figures match the Budget Details under tables.

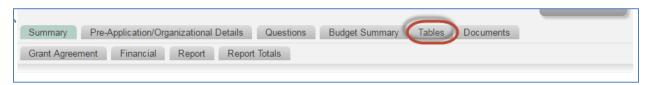
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Tables

This section contains five (5) different tables. The Tables tab editing ability is controlled by the grant manager who may open up columns for editing at specific times. **NOTE:** Not all grant programs are using this tab. If the tab is not visible you are not required to complete it. See instructions listed in the Library.

Once a project has been submitted it cannot be edited unless it is opened for editing by a DCJ grant manager. These fields may be updated by the *Account Owner* or any *Collaborator* that has been given access to the *Application*.



Goals & Objectives

Personnel: Budget & Budget Narrative Details

Click on the Refresh button to calculate columns and rows.

Non-Personnel: Budget & Budget Narrative Details

• Click on the Refresh button to calculate columns and rows.

Additional Project Funding

• Click on the Refresh button to calculate columns and rows.

Prior JAG Funding

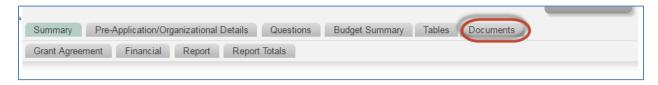
• Click on the Refresh button to calculate columns and rows.

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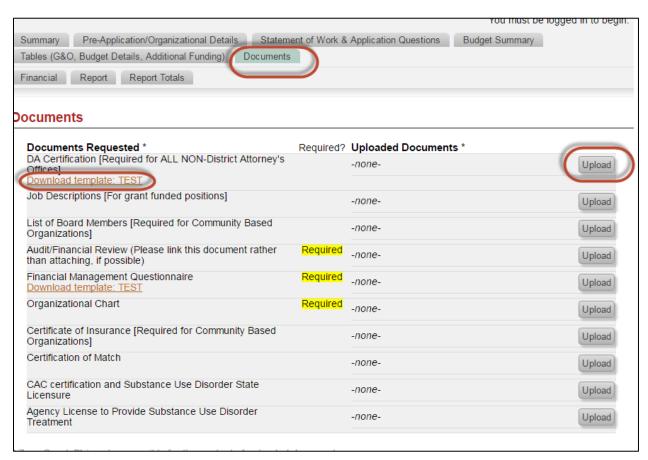
Documents

Location for the uploading of documents by the applicant/grantee. Required documents must be uploaded in order to submit the application. **Note:** Some documents may be required for some applicants and not others, therefore, they are not marked as required. If instructions indicate that you must submit a document and you do not, your application will be considered incomplete.

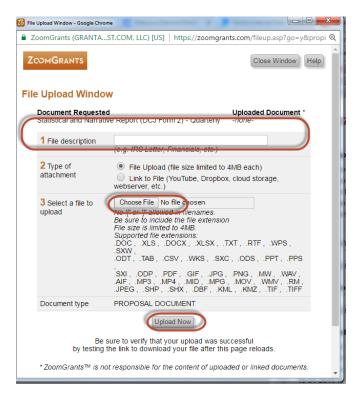
Documents may be updated by the *Account Owner* or any *Collaborator* that has been given access to the Application. **All uploaded documents** will be housed here with **the exception** of the Narrative Report, which will be uploaded on the Report Tab.



Click the **Upload** button and follow the prompts to upload or link your document. To download a template click on the hyperlink for that document. A window will pop-up. If the window does not pop-up, check you pop-up blockers and try again.



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- 1. Enter a file description
- 2. Chose the file to upload
- 3. Then click Upload Now
- 4. **Refresh** the page to see the uploaded document

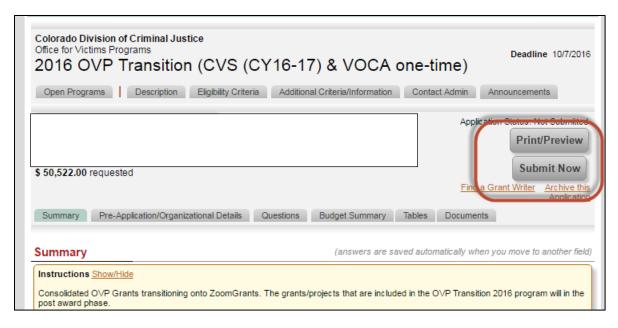
Submitting your Application

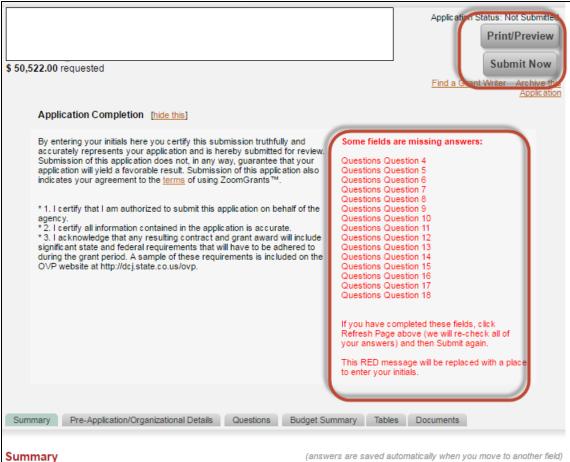
In order to submit your application ALL fields on the following tabs must be completed:

- 1) Summary Tab
- 2) Questions (Statement of Work/Application Questions)
- 3) Budget Summary ZG will allow you to submit if this table is blank, however, if it is blank your application will be considered incomplete.
- 4) Tables (G&O, Budget Details, Additional Funding) ZG will allow you to submit if a table is blank, however, if it is blank your application will be considered incomplete.
- 5) Documents- Required documents only. Some documents may be required for some applicants and not others, therefore, they are not marked as required. If instructions indicate that you must submit a document and you do not, your application will be considered incomplete.

Click on the **Submit Now** Button to submit your application. You will be required to enter your initials on a certification statement.

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If there are missing fields they will appear in red. Go to the correct tab and complete the appropriate question. **Reminder**: every field must be complete. Once you complete the missing question click on the

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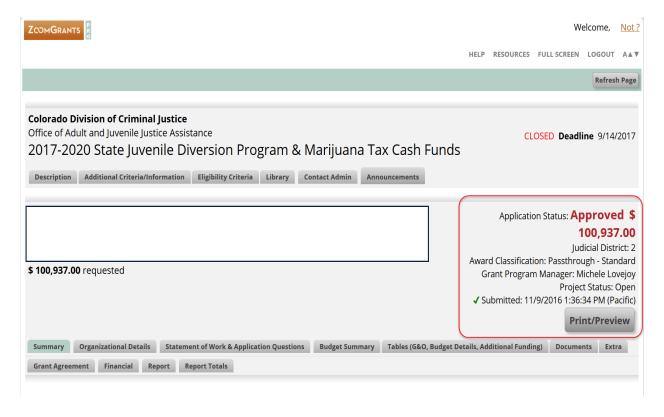
Refresh Page button. Repeat this process until the initials box appears. Enter your initials and click **Submit Now**.

Your application will be automatically saved if you have entered at least one field. You may exit the application and return at any time.

Checking the Status of your Application/Project

The Status of each Application/Project will appear within the Application itself. The information is located between the Program tabs and Application tabs within the application.

NOTE: The *Account Owner* and *Additional Contacts* will receive email notifications regarding the status of the grant as well as requests for information prior to the final decision being made available within ZoomGrants.



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Returning to your Application/Project

Your application will be automatically saved if you have entered at least one field. You may exit the application and return at any time.

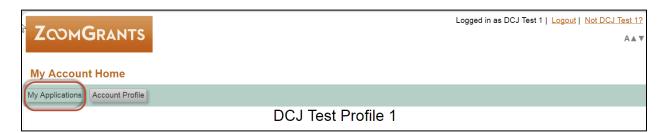


From the Home Page click on My Account Home.

My Account Home

My Account Home has two sections:

- My Applications: Contains all Applications.
- Account Profile: Contains information associated with the user.

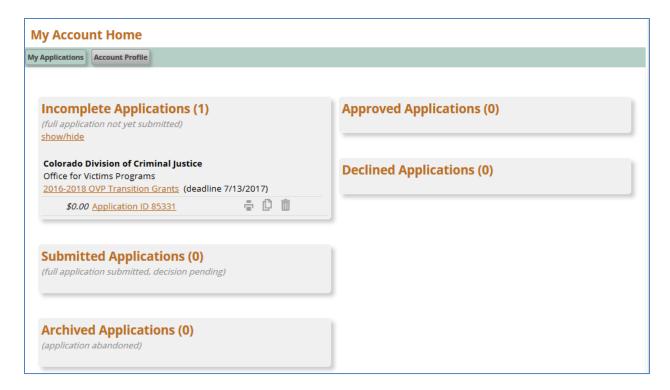


My Applications

My Applications has a series of sections:

- Incomplete: Applications created (at least one field populated), but not yet submitted
- Submitted: Applications submitted and a funding decisions has not yet been made
- Approved: Applications that have been awarded
- Declined: Applications that have been denied funding
- Archived: Applications that the user has archived

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To open an Application click on the hyperlink (name of the project) that you want to open.

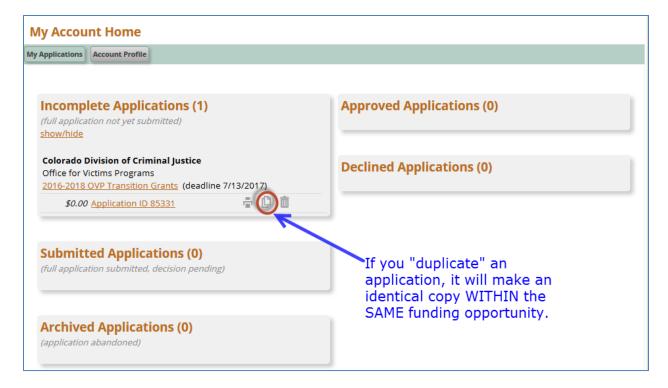
Submitting more than one Application

If your agency is planning on submitting more than one application under the same account profile, you have two options to create a subsequent application: 1) **Duplicate** an existing application or 2) Create a New Application – **Apply Again**.

Duplicate

The Duplicate feature only works if you are submitting multiple applications for the SAME Funding Announcement (e.g. If you are submitting two 2017 Colorado Justice Assistance Grant applications, you may use the duplicate feature. You can NOT copy the 2016 Colorado Justice Assistance Grant into the 2017 Colorado Justice Assistance Grant applications, and must create a new applications).

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If you use the Duplicate feature, please review the new application carefully and make sure you update all the fields to reflect the changes of the subsequent application.

Apply Again

When you select Apply Again, you will get a new blank* application within that funding opportunity. *All fields will be blank except those fields populated from your account profile (some Summary page information).

The only way to access the Apply Again feature is when you first log into ZoomGrants using the following URL: https://zoomgrants.com/gprop.asp?donorid=2225 . If you are already logged in, you will have to log out and log back into get to this screen.

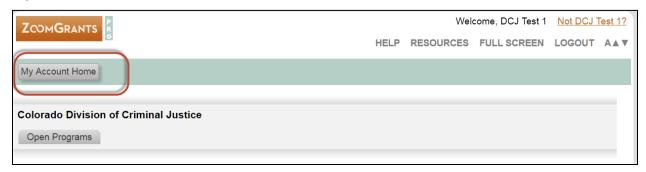
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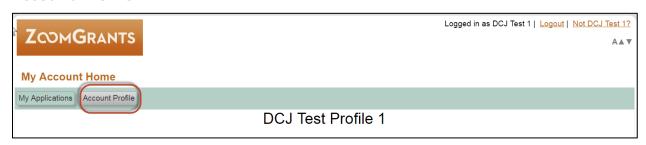
Managing your Account after Award

All the information you entered in the individual application will populate information in My Account Profile. Individual credentials for the Account Owner are associated with the account. Any information changed here will change in ALL applications associated with the account. If a field is changed in the application, it will also be changed here.

My Account Home



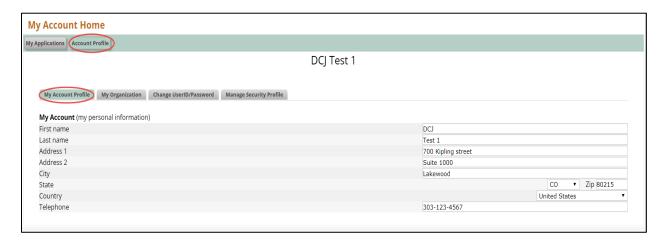
Account Profile



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My Account Profile

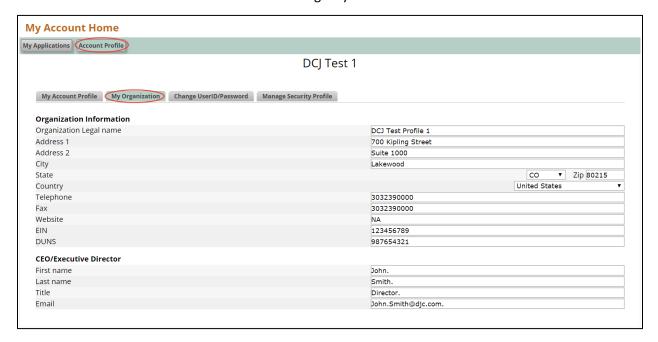
Contact information for the Account Owner.



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My Organization

Contains information associated with the user's agency.

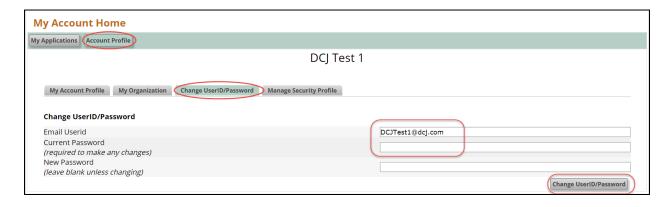


Change UserID/Password

Individual credentials for the user associated with the account.

Email UserID: If you change the Email UserID it will change the login credentials for this account. You will not be able to access this information using the "old" Email UserID. To change a UserID you will need to enter the current password. If you do not know the UserID associated with this account, DCJ will be able to inform you of the UserID, and send the password to that email address. ZoomGrants, not DCJ, will be able to change the account or reset the password.

Change Password: Enter the new password twice.



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Manage Security Profile

ZoomGrants requires all users to maintain a Security Profile to aid in the retrieval of passwords. This profile consists of three security question/answer pairs. If you forget your password, answering those three questions correctly will allow you to reset your password.

1) Click on Manage Security Profile

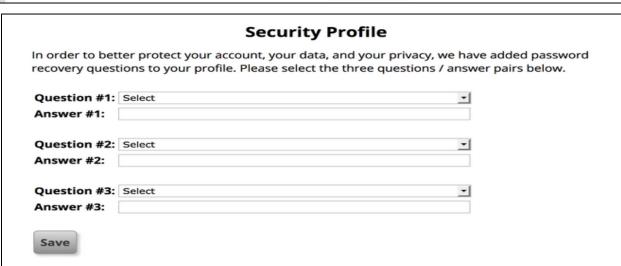
If you have backed out and are coming back into the system following the path:

My Account Home Account Profile Manage Security Profile

2) Review/Update Manage Security Profile as appropriate

• Update your questions and answers, then click the Save button.

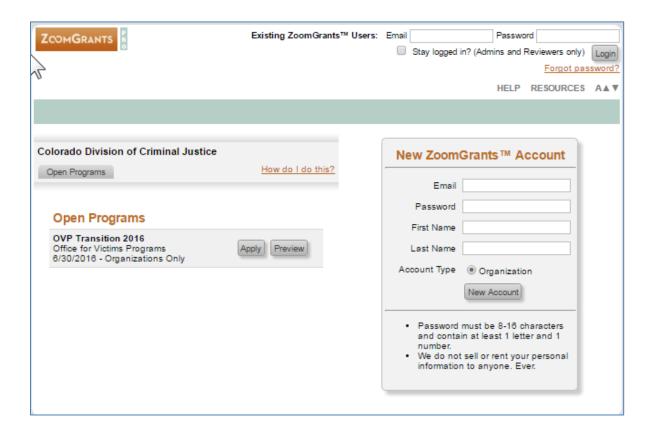




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ZG Tips, Training & How To Information

Navigating the home page



Forgot Password?

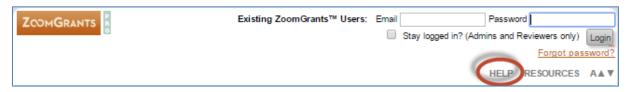


- 1. User will be prompted to provide an email address to reset password.
- 2. Click the Recover Password button.
- 3. Input the answers to all three of your security questions, then click Next. If you've answered all three correctly, you'll be able to enter a new password.

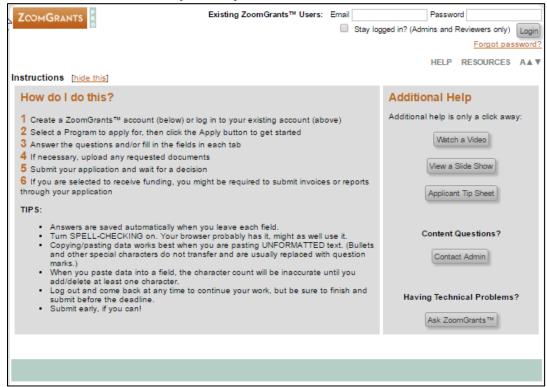
Note: If you have not set up your Security Profile, you will receive your new password in an email from Notices@ZoomGrants.com.

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HELP



- 1. When selected the screen is expanded to show Instructions
- 2. To hide the instructions click [hide this]



RESOURCES



- 1. When selected the screen is expanded to show Additional Resources
- 2. To hide the additional resources click [hide this]
- 3. Additional Resources

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- The Resource section is developed by ZG DCJ does not promote any particular grant writer
- o DCJ will not provide any training or support regarding the Grant Writer information.
- 4. Content Questions? Contact Admin
 - See HELP above
- 5. Having Technical Problems? Ask ZoomGrants
 - See HELP above

(increases or decreases the page font size)

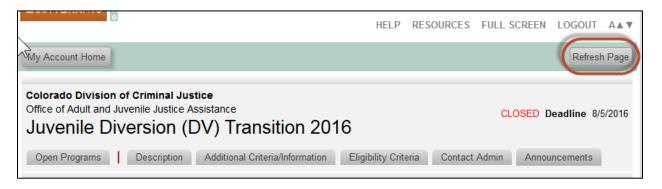


1. Depending on the browser you are using it will increase/decrease the font size or tell you how to increase/decrease it.

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REFRESH PAGE

At the top of each page in the Application is a "Refresh Page" button. This function will show uploads recently uploaded as well as calculated values associated with the tables. Be sure to refresh your page often.



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