GO Smart Applicant Portal and Initial Application Set-Up

Applicant portal set-up: Complete this section before inviting applicants to your site.

	Agency Message	*Administration > Agency Editor*	Craft the message that will display to your applicants when they arrive at your domain. Your message can include imagery, links, and html formatting.
	Work Sample Module	*Administration > Agency Editor*	Set the parameters and directions for your applicants' online portfolios.
	Background Color	*Administration > Agency Editor*	Select the background color that will appear to your applicants, admins, and panelists.
	Logo	*Administration > Agency Editor*	Upload your logo here. PNG and Vectorized file types will alleviate the white border around the logo allowing the background color to extend to the edges of your logo.
	Navigation Pages	*Front End Manager > Navigation Pages*	Create additional web pages that will be available to your applicants. Examples of these types of pages are "Guidelines," "Best Practices," and "Resources."
	Customize Profile	*Front End Manager > Customize Profile*	Turn optional questions on the registration form on or off using the drop-down menus located to the right of each question.

NEA Reporters ONLY: Complete this section before inviting applicants to work on an application.

	DUNS Number	*Front End Manager > Customize Profile*	Set the DUNS Number question to "Displayed and Required" to provide applicants with a field into which they can enter a DUNS number if they have one.
	NEA Template	*Front End Manager > Application Pages*	The questions listed in this page allow applications to gather some data points that automatically appear in the NEA report. These data points include grant amount requested, estimated number of audience members,, and estimated budgets.
	NEA Template, Activity Locations, Project Budget	*Front End Manager > Application Pages*	Including these pages in the Final Report will allow applications to gather most of the data points that will automatically appear in the NEA report, including all of the demographic and budget questions required by the NEA.
	NEA Widget on Grant Manager	*Grant Manager > Grant Manager*	This tool will allow you to add NEA, SAA, and other grant amount shares to the NEA report and allows you to view and modify other budget numbers as needed.

Initial Program/Cycle set-up: Complete this section before inviting applicants to work on a grant opportunity.

	Program Name	*Front End Manager > Program Cycle*	Select the name of the program as it will appear to your administrators from the drop-down menu. This should be a bucket heading such as "Operating Support," "Project Support," "Fellowship," etc.
	Cycle Editor	*Front End Manager > Program Cycles*	From here you can complete the logistics for your cycle.
	Cycle Pages	*Front End Manager > Application Pages*	From here you can complete the pages of your Intent to Apply, Application, Interim Report, and/or Final Report.
	Status Mailer	*Grant Manager > Status Mailer*	After creating the pages of your grant opportunity, be sure to draft any desired auto-emails that will go out when an applicant submits a page set (Application, Intent to Apply, Interim Report, etc.) or when the admin manually changes an applicant to a specific status.

Prepare your next grant opportunity

	Create New Cycle	*Front End Manager > Program Cycles*	After creating a cycle and its pages, you can clone that cycle to create the next cycle, rather than creating new cycles from scratch. Select the original cycle, scroll to the bottom of your Cycle Editor, and click Create New Cycle. The page will refresh and you will see a new cycle with the word EDIT appended to it.
	Modify New Cycle Logistics	*Front End Manager > Program Cycles*	From here you can modify the name, prefix, and other appropriate elements on the Program Cycle Editor to reflect the new cycle logistics.
	Review New Cycle Pages	*Front End Manager > Application Pages*	Review the Application Pages and modify any pages. Pay attention to language and fields that might have outdated dates or information.
	Review Copied Status Mailers	*Grant Manager > Status Mailer*	Review copied Status Mailers and modify, activate, or disable as needed
	Create New Program	*Front End Manager > Program Cycles*	After creating a program, cycle, and its pages, you can clone that program to create additional programs and an initial cycle that is similar, rather than creating a new program from scratch. Select the original cycle, scroll to the bottom of your Cycle Editor, and click Create New Cycle. The page will refresh and you will see a new cycle with the word EDIT appended to it and you will note the new program with the word _COPY appended to it. Modify as you did above.