



2018

# Applicant Dashboard



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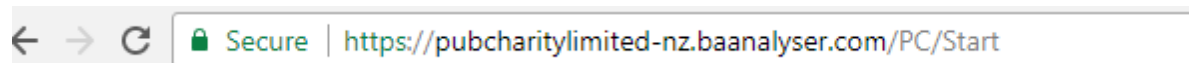
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## Accessing the Applicant Dashboard

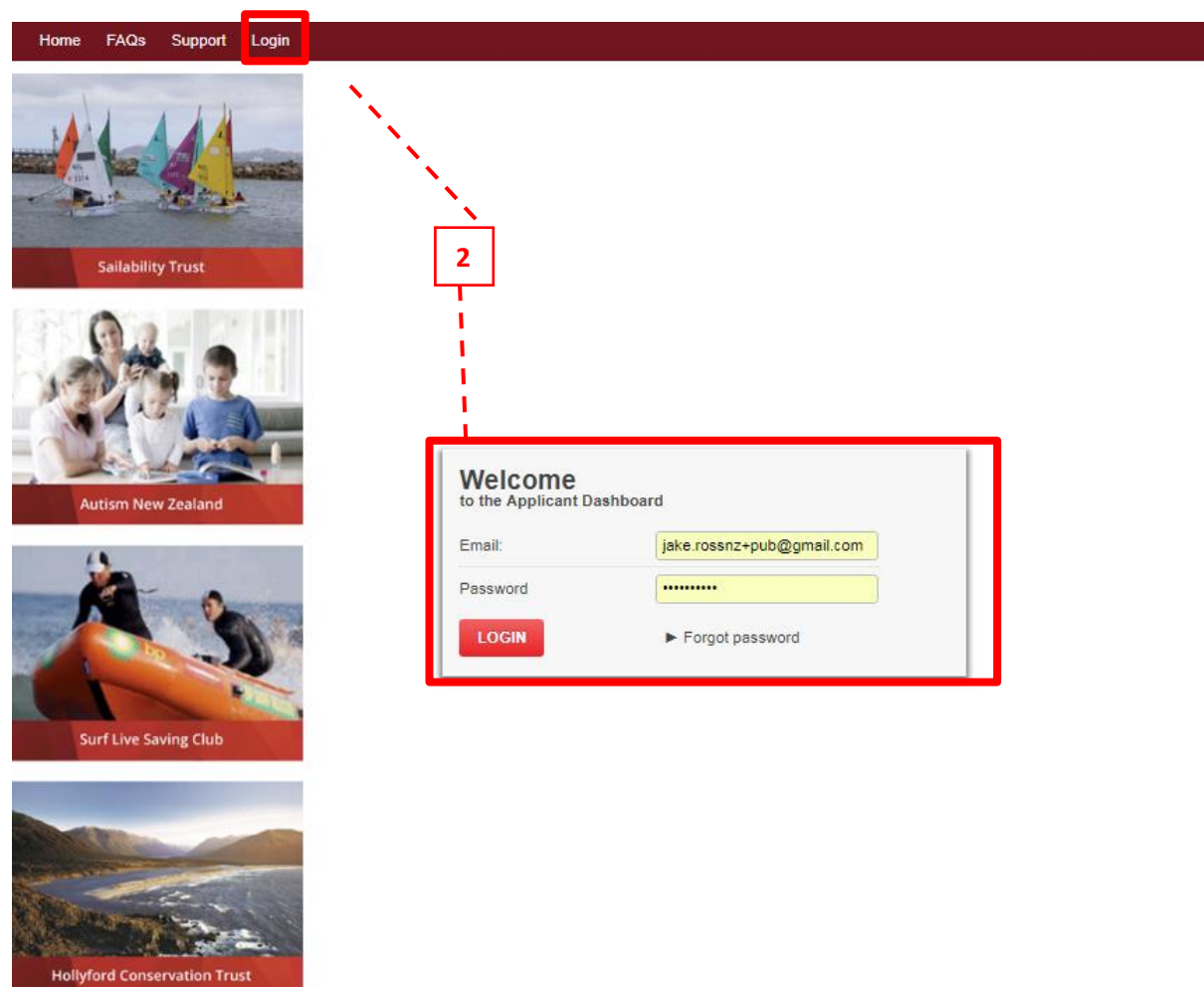
1. To access the Applicant Dashboard, enter the Grant homepage first.

➤ To open the site, [pubcharitylimited-nz.baanalyser.com/PC/Start](https://pubcharitylimited-nz.baanalyser.com/PC/Start) in the address bar (top of page) of your web browser. We will be using 'Chrome' for this guide.

Site example:

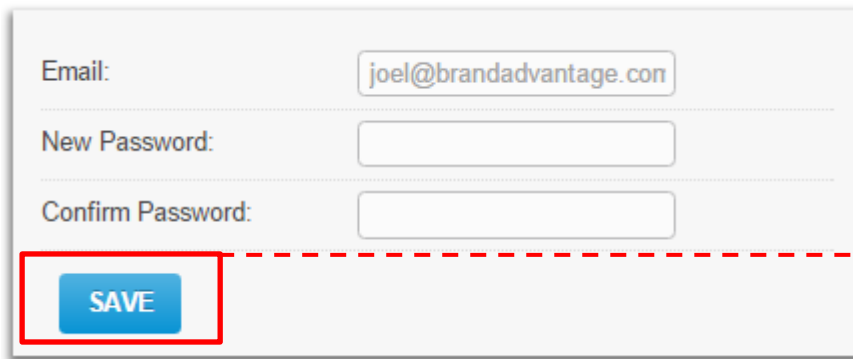


2. Click “Login” located at the top and enter in your ‘Email’ and ‘Password’.



**Important Note:**

If this is your first-time logging in, you will see the prompt below to ask you to assign a password. After you have confirmed your password, you can then use the new password assigned to login and view your application details.



A user registration form with three input fields and a 'SAVE' button. The 'Email' field contains 'joel@brandadvantage.com'. The 'New Password' and 'Confirm Password' fields are empty. A red dashed line points from the 'SAVE' button to a callout box on the right.

Email:	<input type="text" value="joel@brandadvantage.com"/>
New Password:	<input type="password"/>
Confirm Password:	<input type="password"/>
<input type="button" value="SAVE"/>	

Assign a password and click **Save** for first time users.

## Applicant Dashboard Page

Once you have signed in, this is what your Applicant Dashboard looks like. On the left side of the menu where you can click in, you can manage and edit your:

1. **Personal Information** – View applicant/user details.
2. **Manage Organisations** – View applicant organisation details.
3. **Manage Users** – View system users.
4. **Current Application** – View details of current application.
5. **Current Grants** – View a list of Approved grants.
6. **Accountability Reports** – Required to complete if you receive an email notification indicating your application status as approved.
7. **Application History** – View the history of current application.
8. **Creating a new Application**

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### Home Page

Welcome to your Applicant Dashboard. From here you can manage organisation and personal information for the purpose of future applications

View the progress of applications you have submitted.

View information concerning Grants which you have been approved for.

Access the accountability reports forms to fill in the required information following the close of your funded endeavours.

View previous applications which you have submitted.

Go straight to make an new applications using information populated from your dashboard.

If you have any questions regarding the Applicant Dashboard or application process please see our FAQs page or contact our support team.

## Personal Information

This is where you can view and edit your personal profile and reset your password

1. Click “**Personal Information**” to access.
2. To edit the fields, click in the boxes and type your changes.
3. Once you have finished editing, click “**SAVE CHANGES**” to save your changes.

The screenshot shows a web interface for 'Personal Information'. On the left is a sidebar menu with items: 'Personal Information' (highlighted in orange), 'Manage Organisations', 'Manage Users', 'Current Application', 'Current Grants', 'Accountability Reports', 'Application History', and 'Create Application'. A red box with the number '1' is around the 'Personal Information' menu item. The main content area is titled 'Personal Information' and contains several form fields: 'First Name' (Joe), 'Last Name' (Bloggs), 'Email' (jllx22.trill+02000@gmail.cc), 'Position' (Tester), 'Role' (Applicant Admin with a dropdown arrow), 'Phone/DDI' (92385796), 'Street address' section with 'Street Line 1' (20 Queen Street), 'Street Line 2' (empty), 'Suburb' (Auckland), 'City/Town' (Auckland), 'Region/Prov./State' (Auckland), 'Postcode' (1010), and 'Country' (New Zealand). A red bracket with the number '2' is around the 'Role' dropdown and the 'Street address' fields. Below this is a 'Change Password' section with 'Current Password', 'New Password', and 'Confirm New Password' fields. At the bottom is a red 'SAVE CHANGES' button, with a red box and the number '3' around it. On the right side, a red-bordered box contains text: 'Click on the dropdown list to select the 'Role' type to assign. You can either assign yourself as an "Applicant Admin" or an "Applicant User". Admin role gives user administrative privileges.' A dashed red line points from this text to the 'Role' dropdown.

**1**

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**Personal Information**

First Name: Joe

Last Name: Bloggs

Email: jllx22.trill+02000@gmail.cc

Position: Tester

Role: Applicant Admin ▼

Phone/DDI: 92385796

**Street address**

Street Line 1: 20 Queen Street

Street Line 2:

Suburb: Auckland

City/Town: Auckland

Region/Prov./State: Auckland

Postcode: 1010

Country: New Zealand

**Change Password**

Current Password

New Password

Confirm New Password

**3**

**SAVE CHANGES**

Click on the dropdown list to select the 'Role' type to assign.

You can either assign yourself as an "Applicant Admin" or an "Applicant User".

Admin role gives user administrative privileges.



## Manage Organisations

This is where you can view and edit applicant organisation details.

1. Click “**Manage Organisations**” to access.
2. To edit an existing applicant organisation, click “**Edit**” located on the right.

The screenshot shows the 'Manage Organisations' page. On the left is a sidebar menu with the following items: Personal Information, **Manage Organisations** (highlighted with a red box and labeled '1'), Manage Users, Current Application, Current Grants, Accountability Reports, Application History, and Create Application. The main content area has a header 'Manage Organisations' and a table with columns: Organisation Name, Phone, and Other Details. The table contains one row with 'AAG PCL 01 Date' in the Organisation Name column. To the right of this row is an 'Edit' button (labeled '2') and an 'ADD ORGANISATION' button.

1. To edit the fields, click in the boxes and type your changes.
2. Once you have finished editing, click “**SAVE CHANGES**” to save your changes.
3. You can also add an additional organisation you are part of by clicking “**Add additional organisation**”.

👉 The fields you can edit are exactly the same as you see below; click “**SAVE CHANGES**” when you have finished adding the new organisation details.

The screenshot shows the 'Organisation Information' form. It has a sidebar menu with items: Personal Information, **Manage Organisations** (highlighted with a red box and labeled '1'), Manage Users, Current Application, Current Grants, Accountability Reports, Application History, and Create Application. The main content area has a header 'Organisation Information' and a form with the following fields: Organisation Name (AAG PCL 01 Date), Phone, Other Details, Street Line 1 (25 Ponsonby Road), Street Line 2, Suburb (Grey Lynn), City/Town (Auckland), Region/Prov./State (Auckland), Postcode (1011), and Country (New Zealand). A red bracket labeled '1' groups the Street Line 1, Street Line 2, Suburb, City/Town, Region/Prov./State, Postcode, and Country fields. At the bottom are three buttons: '2' (labeled '2'), 'SAVE CHANGES' (labeled '2'), 'ADD ADDITIONAL ORGANISATION' (labeled '3'), and '3' (labeled '3').

## Manage Users

You can enter the email addresses of colleagues or other contacts whom you wish to have access to the selected organisations information available on the dashboard here.  
An email will then be sent asking the new user to create a login.

1. Click **“Manage Users”** to access.
2. To edit an existing user, click **“Edit”** on the right.  
↳ Click **“SAVE CHANGES”** after you have completed your changes.
3. To add a new user, click **“ADD USER”**.

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**Manage Users**

First Name	Last Name	Email	Position	Phone/DDI	Organisation
Joe	Bloggs	jlx22.trill+02000@gmail.com	Tester	92385796	AAG PCL 01 Date

[Edit](#)

**ADD USER**

## Adding a User

1. For adding a new user fill in the fields provided.
2. Click **“SAVE CHANGES”** once you have filled in the necessary fields.

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**Add User**

First Name: Tom  
Last Name: Jones  
Email: tomjones@gmail.com  
Position: Advisor  
Role: Applicant Admin  
Phone/DDI: 4646464616  
Organisation: AAG PCL 01 Date

**Street address**

Street Line 1: 5 Rockwood Place  
Street Line 2:  
Suburb: Epsom  
City/Town: Auckland  
Region/Prov./State: Auckland  
Postcode: 1023  
Country: New Zealand

**SAVE CHANGES**

Click on the dropdown list to select the 'Role' type to assign to the new user. (User or Admin)

Click on the dropdown list to select the organisation the user belongs to.



## Current Application

You will be able to see all the applications currently in progress or has been submitted but requires further action for the selected organisation here.

1. Provides you with the details of the Application which includes:

- Application number
- Organisation name
- Grant organisation name
- Grant category the application is for
- Amount requested by the Applicant Organisation
- Who the application is submitted by
- When the application was submitted

2. What stage an application is at represented by the progress circle which includes:

- Application being submitted
- Application being assessed
- Final decision of the Application made by the Board.
- Eligibility of the Application
- Application being voted on

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### Current Application

Application No:	PC169
Organisation Name:	AAG PCL 01 Date
Grant Name:	Pub Charity Grant
Grant Category:	Community
Amount Requested:	\$0.00
Submitted By:	Dave Murray
Submitted On:	

Expected date of Conclusion: Unknown

App No.	Organisation	Grant Name	Grant Category	Applicant Name	Submitted
<a href="#">PC169</a>	AAG PCL 01 Date	Pub Charity Grant	Community	Dave Murray	<a href="#">View</a>

1

2

To view the Application form itself, click on "View" and you will be taken to the Application page.

You will notice that as an application goes through the different stages of progress, the colour will change for each once it is complete. In this example, the outstanding progress is 'Final Decision'.

To view the progress of a particular application, click on the "App No."

## Current Grants

You can see information about any grants that have been approved for the organisation and the conditions attached to them.

You can also make notes regarding these grants for all with access to the applicant dashboard to see.

1. Click “**Current Grants**” to access.
2. To view an approved grant application, click “**View**” located on the right.

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### Current Grants

App No	Organisation	Grant Name	Grant Category	Applicant Name	Requested Amount	Approved Amount	Date Granted
11	EA Sports	Pub Charity Grant	Sports	Joe Bloggs	\$9,000.00	\$8,000.00	22/09/2016 <div>2</div> <a href="#">View</a>
13	Tester Footy Club	Pub Charity Grant	Community	Jamie Lind	\$9,000.00	\$3,000.00	31/08/2016 <a href="#">View</a>
14	Hockey Inc	Pub Charity Grant	Sports	Arthur King	\$8,000.00	\$3,000.00	20/09/2016 <a href="#">View</a>

1. To view the approved grant, you will need to click “**Download Application**”. A PDF document will be generated and downloaded to your computer

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Progress

100%

Thank you for registering your completed grants proposal with the Pub Charity Limited

We acknowledge your completed request for support and we will respond to you through the email address that you have provided as part of your contact details contained within your grants proposal.

We will endeavour to provide a response within the next 10 working days, but please understand that our response time maybe longer if we receive a higher number of applications or if a public holiday falls within the 10 day period.

Download Application

You can open the PDF document to view, it will have the heading ‘Application for Funding’ on top.

## Application for Funding

Initial Step - Applicant Details

Name of applicant:

Joe Lim

Applicant position:

Applicant

Applicant email:

joel@brandadvantage.com

Applicant phone number:

3070790

## Accountability Reports

When a grant has been received and used for its purposes the applicant/users can view the details of the grant and click through this link to go to the accountability report required of them to fill in.

1. Click “**Accountability Reports**” in the Applicant Dashboard to enter:
2. Click on the “**App No**” that relates to your application to complete Accountability Report.

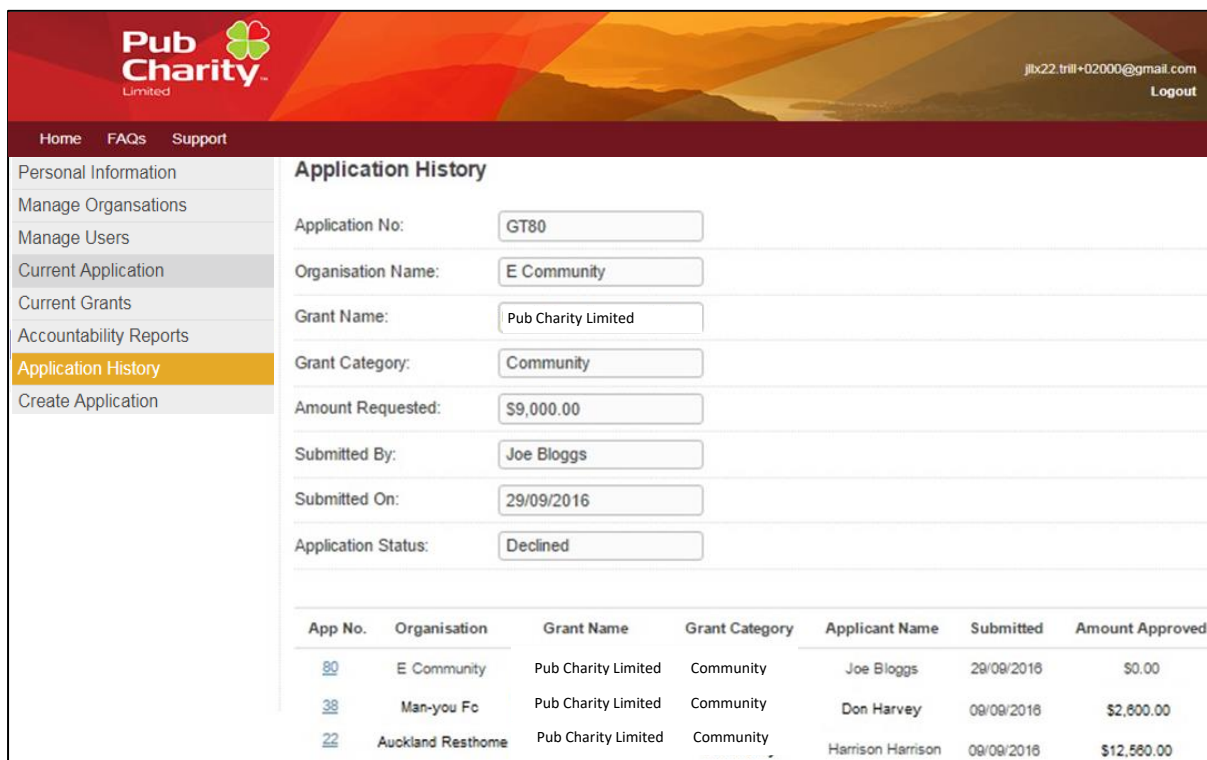
2. Here is the first page you will see for completing your Accountability Report. Please refer to “**Accountability Report Guide**” for instructions to complete an Accountability Report.

## Application History

Here the applicants will be able to view all applications that has been submitted, assessed and finalised ('closed off' with no further actions required).

1. You will see:

- Application number
- Name of Applicant Organisation
- Grant name
- Grant category
- Requested amount from the Application
- Who has submitted the Application
- When the Application has been submitted
- Status of Application (Approved, Declined, etc.)



The screenshot shows the 'Application History' page of the Pub Charity Limited system. The page has a red header with the Pub Charity Limited logo and a user profile 'jlbx22.tnll+02000@gmail.com' with a 'Logout' link. A navigation menu on the left includes 'Home', 'FAQs', 'Support', 'Personal Information', 'Manage Organisations', 'Manage Users', 'Current Application', 'Current Grants', 'Accountability Reports', 'Application History' (highlighted), and 'Create Application'. The main content area is titled 'Application History' and displays a form with the following details:

- Application No: GT80
- Organisation Name: E Community
- Grant Name: Pub Charity Limited
- Grant Category: Community
- Amount Requested: \$9,000.00
- Submitted By: Joe Bloggs
- Submitted On: 29/09/2016
- Application Status: Declined

Below the form is a table with the following data:

App No.	Organisation	Grant Name	Grant Category	Applicant Name	Submitted	Amount Approved
<a href="#">80</a>	E Community	Pub Charity Limited	Community	Joe Bloggs	29/09/2016	\$0.00
<a href="#">38</a>	Man-you Fo	Pub Charity Limited	Community	Don Harvey	09/09/2016	\$2,600.00
<a href="#">22</a>	Auckland Resthome	Pub Charity Limited	Community	Harrison Harrison	09/09/2016	\$12,560.00

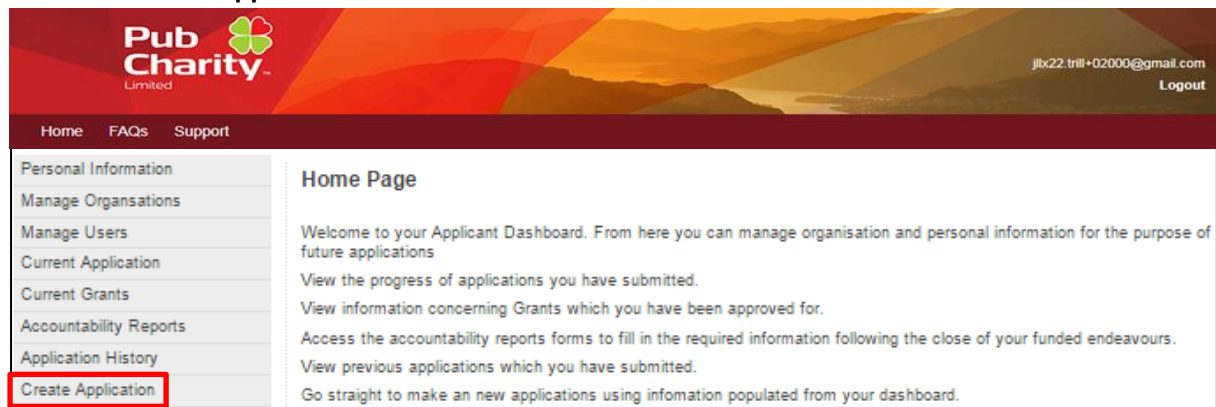
To view a particular application history, click on the "App No."

## Create Application

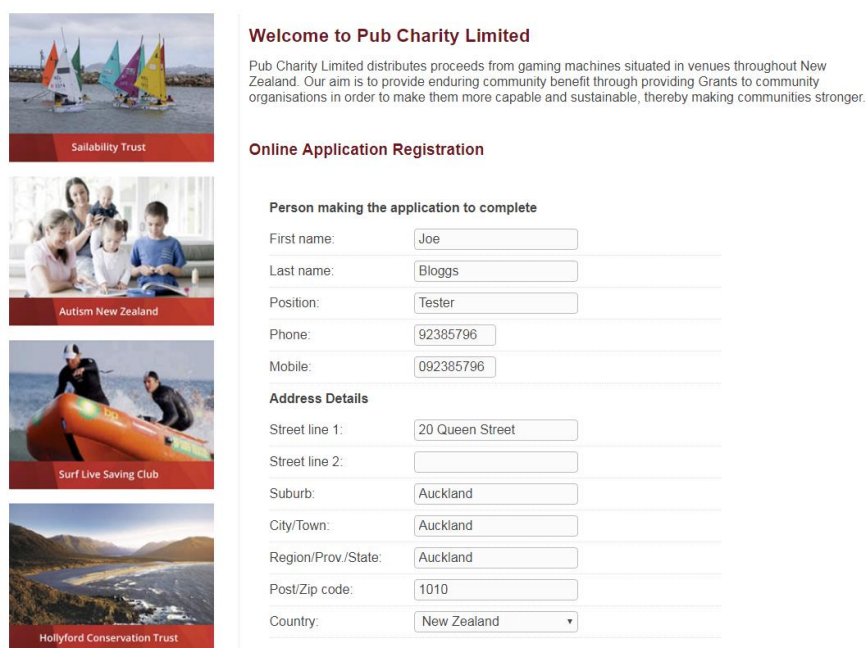
Here you can start a new application under your selected organisation with the available data populated into the application form:

- Organisation info
- Personal info

➤ Click **“Create Application”**.



➤ You will be taken to the ‘Online Application Registration’ page.



**Welcome to Pub Charity Limited**

Pub Charity Limited distributes proceeds from gaming machines situated in venues throughout New Zealand. Our aim is to provide enduring community benefit through providing Grants to community organisations in order to make them more capable and sustainable, thereby making communities stronger.

**Online Application Registration**

**Person making the application to complete**

First name:

Last name:

Position:

Phone:

Mobile:

**Address Details**

Street line 1:

Street line 2:

Suburb:

City/Town:

Region/Prov./State:

Post/Zip code:

Country:

☐ I accept the [Terms & conditions](#) and understand that it does not mean that our organisation is guaranteed to receive a grant.

Please note: All application information will be kept confidential and is subject to our [Privacy Policy](#)

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**End of Guide**