

## *Grantium guidance for applicants*

# How to create and manage your user account and applicant profile

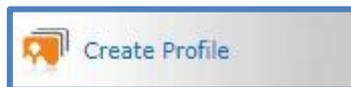
*Version 1 – March 2018*

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## User accounts

Having a user account will let you log on to Grantium. It is unique to you and you should not share your log on details with anyone. You only need to create a user account once. To do this, click **Create Profile** in the navigation bar on the left of [the Grantium homepage](#).



This will open the user account creation screen. Complete all fields marked with an **asterisk\***.

**You must enter your real first and last names. This name will be used as your digital signature when you accept any grant. We cannot accept your stage/professional name or the name of an organisation.**

Your username, however, can be anything you want it to be provided it does not already exist on the system.

Once you've completed all fields, click **Save** to create your user account.

You can also begin this process by clicking **Browse programmes** from [the Grantium homepage](#), which begins the Registration wizard that will take you through all the necessary steps to apply for funding, including the next stage, creating an Applicant profile.



## Applicant profiles

Once you have created your user account and logged in to the system, you must create an applicant profile before you can make an application. The applicant is either an individual (yourself) or an organisation who can enter into a grant agreement if the application is successful.

Users can be linked to several different applicant profiles. For example, an organisation's applicant profile should be linked to at least **two** user accounts: one for the person who writes and submits grant applications, and one for the person who has authority to accept an offer of a grant, normally a chief executive or equivalent.

For guidance on how this works, see the section [How to link a user to an applicant](#).

### Individuals:

- artists, musicians, writers, performers, promoters, producers, curators, directors
- groups of people who are not part of an organisation. In this case one person will need to take the lead and have the main responsibility for managing the application and any grant
- sole traders, whose business bank account names **must** include their business names. For example, "John Smith trading as Arts Club".

Your individual applicant profile should always be **in the same name** as your user account. This is because we would not expect individuals to make applications on behalf of another individual, and because the signatory accepting any individual grant **must match** the name of the individual we are making a grant to.

### Organisations:

By 'organisation' we mean a single group of people working towards a shared or common goal, with a governing document in place to support its work.

Organisations can take many forms, for example a limited company, a charity, or an unincorporated group.

If you create an organisation applicant, you **must** have:

- **a bank account** in the organisation's exact name, with two signatories (unless you operate a business as a sole trader and then we can sometimes accept an account with a single signatory). You can find out more about our bank details requirements in the [bank details guidance](#), on our website.
- **a governing document**, which we will request when you submit your applicant profile to us. See our Governing documents [information sheet](#) for more information.

## Validation of applicant profiles

When you create an applicant profile for the first time, you will not be able to access an application form until we have validated your profile. We do this to make sure no duplicate profiles are created on the system. This validation process can take up to **ten working days**. Please bear this in mind when you are planning your application.

## Creating an applicant profile

Once you are logged in, click **Browse Programmes** in the left menu bar. On the next page, click the **Register** icon next to the funding programme you want to apply for.

Programme Name	Programme Start	Registration Start	Registration End	Register	View
Arts Council National Lottery Project Grants	01-Jan-2009	01-Jan-2009	31-Dec-2024		

This will take you into the applicant profile creation screens.

Select your **Applicant Type** (individual or organisation) from the dropdown and enter the **name** of your applicant when the field appears:

**Applicant Details**

\* **Applicant Type:**

\* **Applicant Name:**

\* **Applicant Number:**

The applicant name should be **your legal name**, or **the legal name of your organisation**. It should **not** be your stage/professional name if that is different from your real name.

The applicant name **must** also correspond to a bank account in the same name. For more information please read our [bank details guidance](#).

Once you've created your applicant, we will ask you for the following information in a short series of pages:

### **Individual Applicant:**

- ▶ **Applicant Details**
- ▶ **Address information**
- ▶ **Monitoring information**
- ▶ **Declaration**

**Organisation Applicant:**

- ▶ Applicant details
- ▶ Address information
- ▶ Your contact information
- ▶ Financial background
- ▶ Governance document attachments
- ▶ Monitoring information
- ▶ Declaration

To complete the form, work through the pages listed down the left-hand side of your screen. Complete all fields marked with an **asterisk\*** in each page.

We ask for more information if you are applying as an organisation. If you are unsure what you should provide, contact us for more detail.

The last page in every form is the [Submission summary](#) page. It will let you know whether you've completed the form and allow you to submit it if you have.

**Remember, Grantium logs you out after 15 minutes if you haven't saved or clicked on any other buttons, so save often using the Save button.**

**A note on your address:**

When determining where an applicant is based for purposes of our decision-making and budgeting processes, we will use the address from your Grantium profile.

We would expect this address to reflect the applicant's main location and/or main business address (for instance where an applicant does not have a physical presence in any one location, it would be the main business address, e.g., where important documents would be sent, or the address registered with the organisation's bank).

It does not need to be your registered address (there may be instances where an applicant's registered address is not the same as their main location, for example where they are using an accountant or solicitor's address).

**A note on Monitoring information:**

We may use this information to report to the Government or to monitor the different backgrounds of people who receive grants. We will not use this information to assess any applications you make. If you do not know some of the information or you would prefer not to provide it, you can fill in the 'Not known/Prefer not to answer' boxes.

## Submitting your applicant profile

The **Submission summary** page lists all the steps you've worked through. It is the final page in each section of the process, but you can refer to it at any time. If you have completed a step successfully, there will be a green tick beside it. If a step is incomplete or has not been completed successfully, there will be a red cross beside it.

Submission summary			
Complete	Page	Last Updated	Mandatory
✓	<a href="#">Applicant details</a>	15/03/2017	Yes
✓	<a href="#">Address information</a>	15/03/2017	Yes
✗	<a href="#">Monitoring information</a>	Please Complete	Yes
✓	<a href="#">Declaration</a>	15/03/2017	Yes

Notes:

- [The monitoring information is incomplete. Only 1 ethnicity, age, gender and 1 Sexual Orientation checkbox must be selected and disability checkbox must have 1 or more checkboxes selected. Click here to return to Monitoring information form.](#)

If your submission summary includes a red cross, a note at the bottom of the page will tell you what you need to do. Click on this note to go to the right page and make your changes.

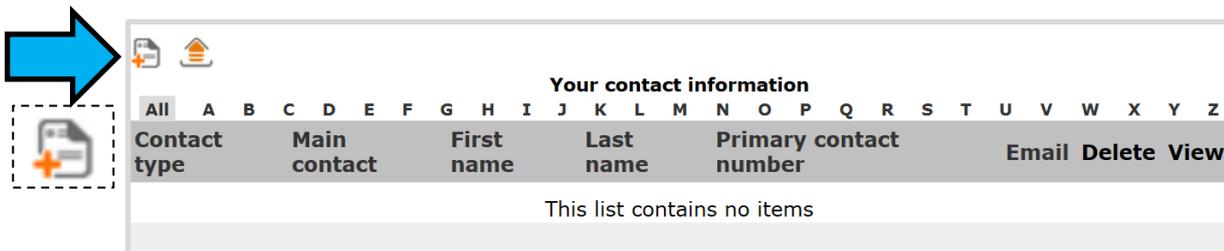
Once this screen shows all green ticks and you're happy with your form, click **Complete** to submit it to us for review.

## Additional information for organisations

### Your contact information

You should enter the names and contact details of any key members of the organisation's staff here. **Please note: these contact details are for your organisation in general and are not specific to a single project.**

To add a contact, click the **add** icon . This opens the **contact details** screen.



This screen allows you to add the details of any key members of staff at your organisation (such as Chief Executives, Finance Officers, Administrators, etc). You can add as many contacts as you think relevant.

One contact needs to have the checkbox ticked to signify that they are the **main contact** for this organisation.

#### An important note on the main contact:

To receive any notifications about applications and projects made using this applicant profile, the main contact also needs to have a user account. Their account must then be linked to this applicant. For guidance on how to do this, see the section [How to link a user to an applicant.](#)

### Governance document attachments

On this screen, you need to attach a **Governing document**. All organisations making an application to us (including unincorporated groups) must have a written governing document in place (for example a constitution, set of rules or trust deed).

To add your governing document, click on [Click to add governance document](#) and upload the file.

**Governance document attachment**

You should use the link below to upload your governance document. Please note that the maximum file size you can upload is 10MB and we accept pdf, MS Word, MS Excel, MS PowerPoint and jpeg files.

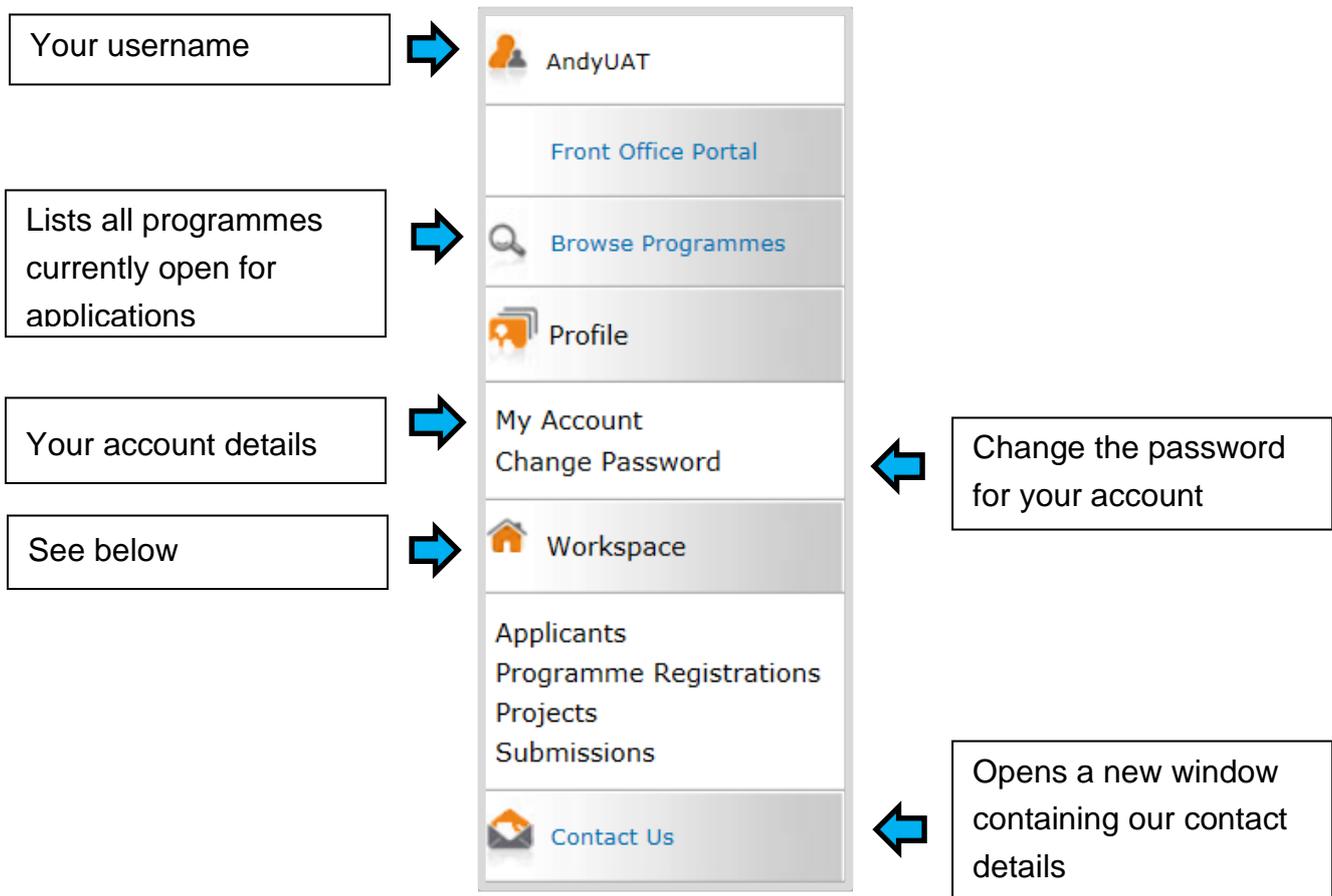
Document Type	Required?	Description	Date attached	Attachment type	Download	Delete
<a href="#">Click to add governance document</a>	No	--	No attachment	---		

If you wish to change your governing document after your profile has been validated please email [grant.management@artscouncil.org.uk](mailto:grant.management@artscouncil.org.uk) For further details please see **'How to update the details in your Applicant Profile'** below.

### Monitoring information

Here, we ask you to enter figures for the make-up of your senior management team and your management committee, board, governing body or council.

## Navigating Grantium



### The Workspace section

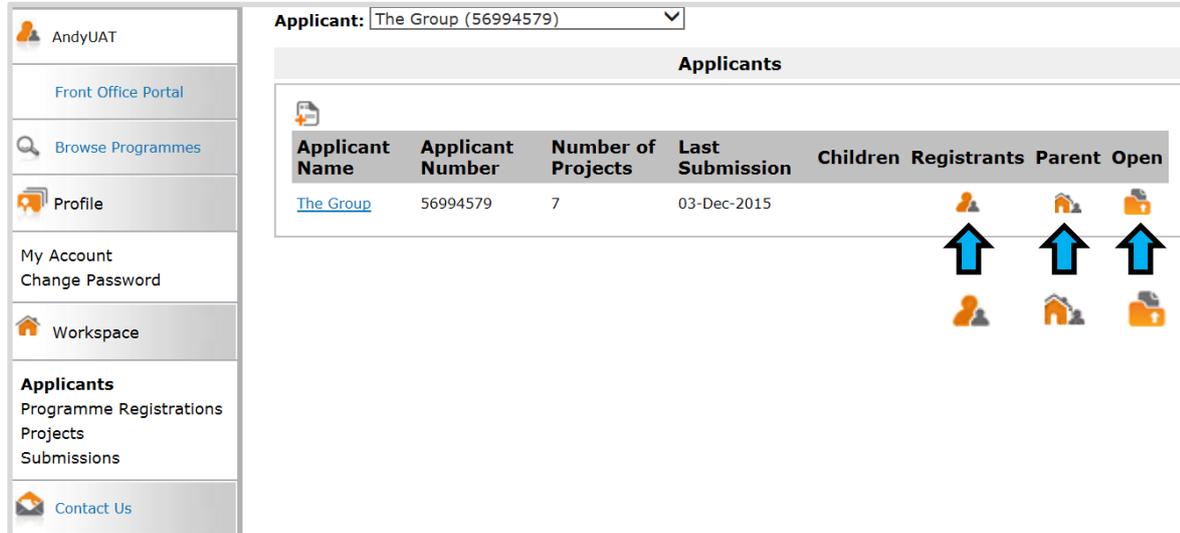
The headings in the Workspace section are how you will manage any projects or grants you have with Arts Council England. The headings are:

- **Applicants**
- **Programme registrations**
- **Projects**
- **Submissions**

The following sections will look at these headings in further detail.

## Applicants

**Applicants** shows all the applicants you are linked to.



Applicant Name	Applicant Number	Number of Projects	Last Submission	Children	Registrants	Parent	Open
<a href="#">The Group</a>	56994579	7	03-Dec-2015				

The screen will only show one applicant at a time. If you are linked to multiple applicants, you can select the one you want to view from the dropdown at the top of the screen.

For help in creating an applicant, please read the section on [Starting to create an applicant](#).

To view a list of the other users who are linked to this applicant, click the **Registrants** icon . If you want to link another user to this applicant, please read the [How to link a user to an applicant](#) section of this guidance.

The **Parent** icon  will show you a list of other applicants which are linked with your applicant. This is an internal function for Arts Council England and is only really relevant to universities and local authorities.

To view the contact details of the applicant, click the **Open** icon . If you want to amend any of the contact details within, please read the section on [How to manage your contact details](#) of this guidance.

## Programme Registrations

**Programme Registrations** lists all the funding opportunities that are open for applications.

Applicant: Peter Warbeck (55284818)

Programme Registrations																										
All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Programme Name	Applicants Registered	Start Date	End Date	Register	View																					
Arts Council National Lottery Project Grants	1	01-Jan-2009	01-Jan-2025																							

*Note: The Register and View icons in the image are highlighted with blue arrows pointing upwards.*

Again, this screen will only show details for one applicant at a time. If you are linked to multiple applicants, you can select the one you want to view from the dropdown at the top of the screen.

To register an applicant for a funding programme, first ensure you have the correct applicant selected, then click the **Register** icon . This will take you to a notification page which will let you know you have now registered your applicant for that funding programme. This means that you will be able to access the eligibility questionnaire and application form for that programme.

To find out more information about a funding programme, click the **View** icon  on the relevant line. This will take you to a landing page with information about the selected funding programme. From this page, you can begin an application by clicking **Apply Now**.

## Projects

**Projects** lists all the projects you have ever created on the system.

Again, this screen will only show details for one applicant at a time. If you are linked to multiple applicants, you can select the one you want to view from the dropdown at the top of the screen.

Use the filters to filter by open or closed projects, or by different programmes.

### A note on naming your projects

The **Projects** screen can start to look confusing if you have several projects with similar names. If you request funding for an annual event which always has the same name, or if you have to resubmit an application for a project, please make sure the projects are named in a clear way that allows you to see the project you want to work on.

## Submissions

**Submissions** lists everything you have submitted to us for each of your projects. This includes **eligibility questionnaires, application forms, offer acceptances, payment requests and reports.**

Applicant: Peter Warbeck (55284818)

**Submissions**

[Hide Filters] [Clear Filters]

Applicant Project Name: All Projects

Date Submitted: On [23]

Project Status: Open Projects

Submission Version: Latest Version

Associate Type: All

Filter

Project Name Project Number	Programme Name Step Name	Start Date	End Date	Associate Type	Version	Date Submitted	Actions
Meditations on power ACPG-00028391	Arts Council National Lottery Project Grants Eligibility questionnaire	01-Jan-2009	01-Jan-2025	Primary Applicant	1	27-Feb-2018 11:22:40	
Meditations on power ACPG-00028391	Arts Council National Lottery Project Grants Application	01-Jan-2009	01-Jan-2025	Primary Applicant	1	27-Feb-2018 11:27:26	
Seize the throne - R&D ACPG-00028392	Arts Council National Lottery Project Grants Eligibility questionnaire	01-Jan-2009	01-Jan-2025	Primary Applicant	1	27-Feb-2018 11:23:49	
Seize the throne - R&D ACPG-00028392	Arts Council National Lottery Project Grants Application	01-Jan-2009	01-Jan-2025	Primary Applicant	1		

Again, this screen will only show details for one applicant at a time. If you are linked to multiple applicants, you can select the one you want to view from the dropdown at the top of the screen.

If you have several projects, it might be useful to use the filters to show the submissions relating to one specific project. To do this, select the relevant project from the dropdown and click **Filter**.

The **Start Date** and **End Date** shown on this screen relate to the programme itself and are not specific to your project so you can ignore these.

The **Date Submitted** shows you when a particular submission was completed and submitted to Arts Council England. If there is no date shown in this column, this means the submission still needs to be completed and submitted.

To continue working on a submission, click the **Open** icon . This will take you directly into the submission where you can continue to work on it.

To view a submission that has already been completed, click the Open icon . This will take you directly into the submission. You will not be able to amend anything, but you will be able to click through it and review everything within it.

## How to update the details in your Applicant Profile

By using the system to make an applicant profile and/or make an application, you are agreeing to keep your own details up to date by maintaining your **Applicant profile**. What you enter into the system is Arts Council England's only record of your contact details, so they must be kept updated. You are also responsible for keeping all of your other information up to date – including artform, and bank account name.

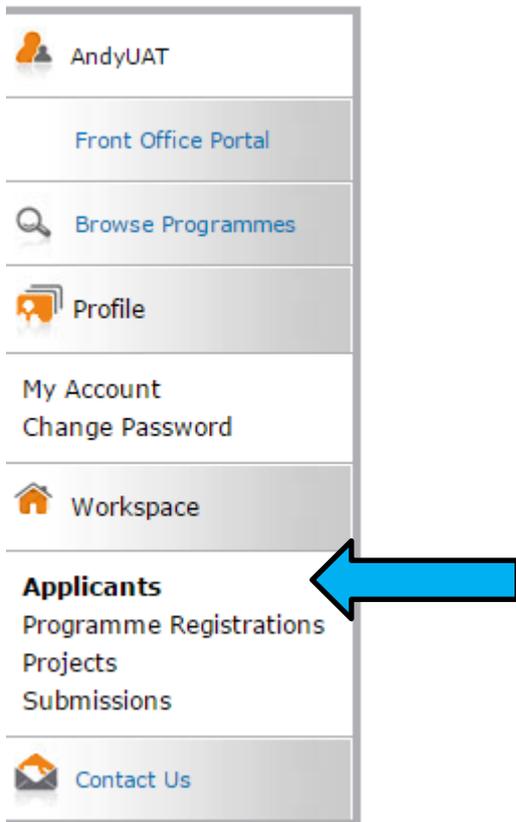
If you have forgotten your log on details, please click on [Forgot your password](#) or [contact us](#). Please do not create a duplicate applicant profile, this may delay the processing of your application.

Some fields within the profile are locked after validation. If you wish to amend your applicant name, organisation legal name, legal status, governing document, company number or charity number please email [grant.management@artscouncil.org.uk](mailto:grant.management@artscouncil.org.uk)

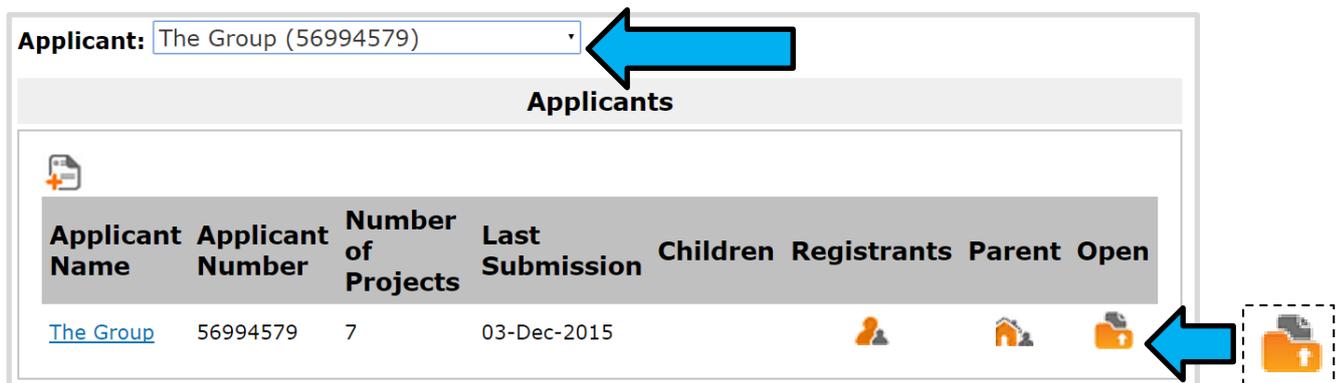
Please note that if an organisation changes company number / legal status you need to create a new applicant profile for the new legal entity. If you have a live grant you need our written permission to change legal status.

To make changes, log in to the system.

Click **Applicants** in the navigation bar on the left side of the screen – see screenshot on next page:



On the next screen, select the relevant applicant from the dropdown at the top of the screen:



Next, click the **Open** icon .

The next screen is titled **Applicant Details** and is the first screen of your applicant profile. To make changes, you will first need to go to the **Submission summary** by clicking the link in the navigation bar on the left of the screen.

Please note, the sections listed in the navigation bar for organisation applicants will be different to the list for individual applicants.

On the **Submission summary** screen, click **Edit**. This opens all the sections of the applicant profile for editing.

You will now be able to go into each section of the **Applicant profile** and make any changes you need to.

When you have finished making changes, return to the **Submission summary**.

This time, click **Complete** to close all sections of the form again and save any changes you have made.

## How to link or unlink a user to an applicant

Once you have created an applicant profile, you may want other users to have access to that profile. There are several reasons why you would want to do this:

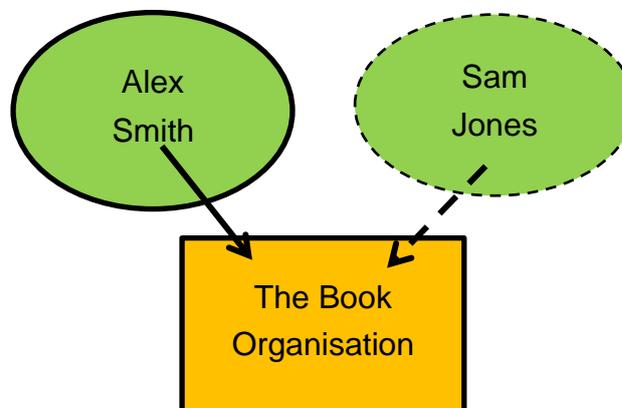
1. you work on behalf of an organisation and there are several people within your organisation who want to be able to submit applications on its behalf
2. you work at an organisation and are not authorised to accept grant offers. As such, your chief executive officer (or equivalent) would need an account and to be linked to the organisation profile
3. you are working with an access support worker and want a support worker to be able to work on your applications
4. you are working with a consultant and want the consultant to be able to work on applications and to see all the information relating to your applicant

Each of these people would need to create a user account for themselves. As the person who created the applicant in the first place, you would then have to find these users on Grantium and create a link between them and the applicant profile.

### Example

User

Applicant



In this example, Alex Smith creates a user account. Alex then creates an applicant, The Book Organisation. Sam Jones is the CEO of The Book

Organisation. Alex asks Sam to create a user account. Once this is done, Alex finds Sam on the system and links Sam to The Book Organisation.

Click **Applicants** in the left menu bar. Make sure you have the right applicant selected from the dropdown menu at the top and then click the **Registrants** icon . 'Registrant' is a name for a user who has access to an applicant.

Applicant:

Applicant Name	Applicant Number	Number of Projects	Last Submission	Children	Registrants	Parent	Open
<a href="#">Andy Solo</a>	54871838	83	11-Dec-2015				

Click the **Link** icon.

Applicant:

**Applicant Details**

Applicant Name: Andy Solo  
Applicant Number: 54871838

**Registrants**

Name	User Name	Email	Group	Delete	Open
UAT, Andy	AndyUAT	<a href="mailto:andy@uat.cam">andy@uat.cam</a>	Administrator		

1

A window opens to add the user's details.

The screenshot shows a web form for adding a registrant. At the top, there is a dropdown menu for 'Applicant' with 'Andy Solo (54871838)' selected. Below this is a section titled 'Applicant Details' containing the text 'Applicant Name: Andy Solo' and 'Applicant Number: 54871838'. The main section is titled 'Add a Registrant' and contains three required fields: '\* User Name:' with the value 'andytest', '\* Email Address:' with the value 'andy@test.cam', and '\* Group:' with a dropdown menu set to 'Administrator'. At the bottom of the form are two buttons: 'Add Registrant' and 'Back to List'.

Under **Group**, you have two options available from the dropdown: **Administrator** and **Standard User**.

The functions of the two roles are the same except that an **Administrator** can link and unlink other users to an applicant and a **Standard User** cannot.

You should decide which role to give any registrants. These can be amended at any time. Once you click **Add registrant**, the process will be complete.

On the **Applicant Details** screen, you will now see all the users linked as registrants.

## Deleting registrants or amending user rights

From the **Registrants** page, you can delete registrants or edit their permissions.

### To delete a registrant:

- click the **Delete** icon 
- click **OK** in the resulting box to complete the process

### To amend a registrant's user rights

- in the **Group** column, choose the relevant role from the dropdown, beside the relevant user.
- click **Ok** in the resulting box to update the permissions.

Applicant:

---

**Applicant Details**

Applicant Name: Andy Solo  
Applicant Number: 54871838

---

**Registrants**

Name	User Name	Email	Group	Delete	Open
UAT, Andy	AndyUAT	<a href="mailto:andy@uat.cam">andy@uat.cam</a>	Administrator		
Test, Andy	Andytest	<a href="mailto:andy@test.cam">andy@test.cam</a>	Administrator		
1			Standard User		

## Further information and support

There is more information and guidance about Grantium on our guidance page:

<http://www.artscouncil.org.uk/welcome-grantium>

If you have any questions about the information contained in this document or if you need any help with completing a form, you can contact our Customer Services team on:

**Phone:** 0845 300 6200, 0161 934 4317  
**Email:** [enquiries@artscouncil.org.uk](mailto:enquiries@artscouncil.org.uk)  
**Website:** [www.artscouncil.org.uk](http://www.artscouncil.org.uk)



## Appendix I – Linking user account examples

The following appendix outlines some of the different situations in which you may need to link additional user accounts to applicant profiles.

### Organisations

This is an example of how an organisation would set their applicant profile up on Grantium. If you are a [university or local authority](#), please refer to the next section.

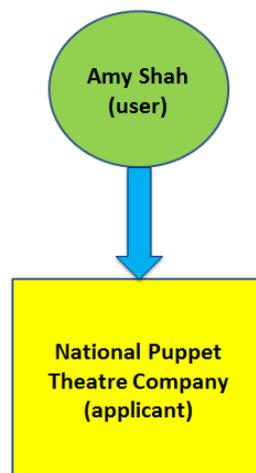
#### Example

Amy Shah is the Chief Executive of the National Puppet Theatre Company. She wants to set up the organisation's applicant profile.

Amy creates a **user account** in her own name which gives her access to the system (represented by green circle in the diagram below).

She then creates an **applicant** called National Puppet Theatre Company (yellow square).

Amy must ensure she has the **delegated authority** within the organisation to create an applicant profile on behalf of that organisation.



After we have **validated** the applicant profile, Amy can make applications on behalf of National Puppet Theatre Company and, if successful, manage their grants online. If the organisation changes address or any contact details, she can amend these in the applicant profile.

Organisations should have more than one user connected to their applicant profile; if only one user account is linked to your organisation's applicant profile this may cause problems accessing your profile at a later date if they are not available or leave the organisation.

### Adding a second user to an organisation applicant profile

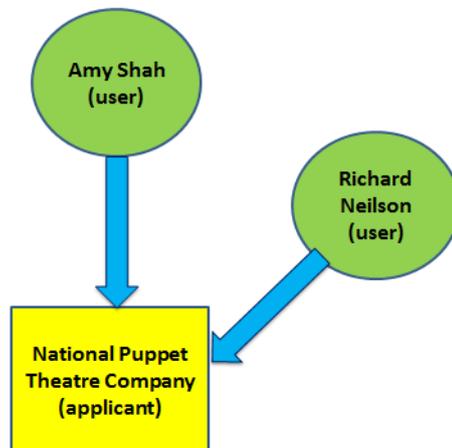
With the above in mind, Amy asks her General Manager, Richard, to work on an application with her in Grantium.

For Richard to have access to the National Puppet Theatre Company applicant profile, he must set up **his own user account** to gain access to the system.

Once he has done this, he must let Amy know his **user name** and **email address**.

With this information she can link him as a user to the organisation's applicant profile, as shown in the diagram below. Please see the section of this guidance on [how to add and remove another user from an applicant profile](#) for more information.

Both Amy and Richard now have access to all the information stored within the National Puppet Theatre Company's applicant profile – this would include any previous applications made by the applicant as well as any monitoring information submitted to meet any payment conditions.



## Universities and local authorities

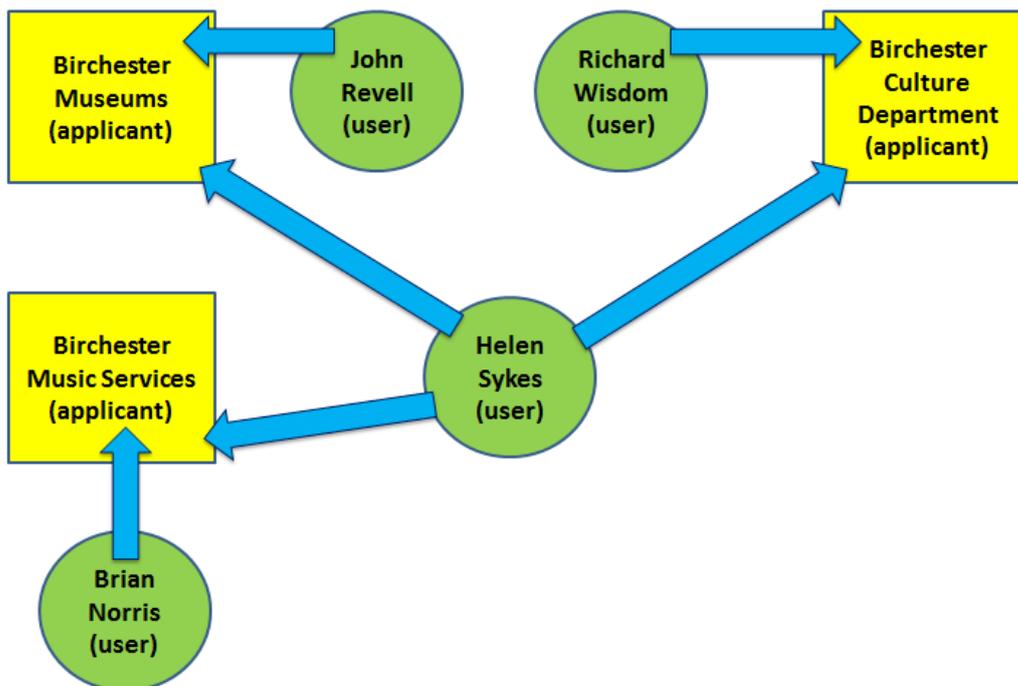
Organisations such as universities and local authorities contain many departments whose work may not necessarily cross over. In many cases departments are also split across different sites and therefore may not be aware of another department making applications to us.

**We recommend that departments of universities and local authorities set up their own separate applicant profiles.**

### Example

Birchchester City Council has three departments who are going to make applications to Arts Council England: the Museums department, the Culture department and the Music Services department.

Each of the heads of those departments must set up their own **user accounts**, and create an **applicant profile** for their own department.



Brian Norris, Head of Music Services, sets himself up as a user. He is then prompted to create an organisational applicant profile, which he calls Birchester Music Services. After the applicant profile is validated by the Arts Council, Brian can make applications and if successful, manage grants via the system.

The heads of the Museums department and the Culture department go through the same process of setting up their own a user accounts, and then their department's organisational applicant profile (see diagram).

As a local authority is defined as a type of organisation, only the staff member with the correct delegated authority can accept a grant on behalf of that organisation. Therefore, in this example, the Chief Finance Officer (Helen Sykes) must also set herself up as a user.

Once she has done this, she must let each of the Heads of Departments know her user name and email address. With this information, they can then link her as a user to each of their departments, as shown in the diagram opposite. Step by step guidance on [how to link and unlink a user](#) can be found earlier on in this guidance.

## **When a person works for more than one applicant**

Many people in the arts and cultural sector will work for more than one applicant. This example will illustrate a person who is both an individual artist and someone that works for an organisation.

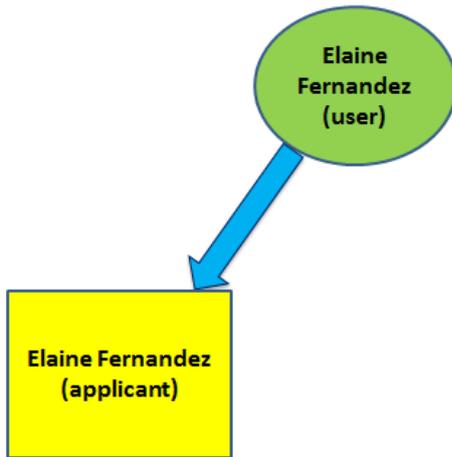
### **Example**

Elaine Fernandez has two jobs. She works both as an independent musician as well as an Artistic Director for a classical music organisation. She applies to Arts Council England for grants as both an individual artist as well as on behalf of the music organisation she works for.

### **Elaine's own applicant profile**

She creates her user account (green circle in the diagram below) which gives her access to the system.

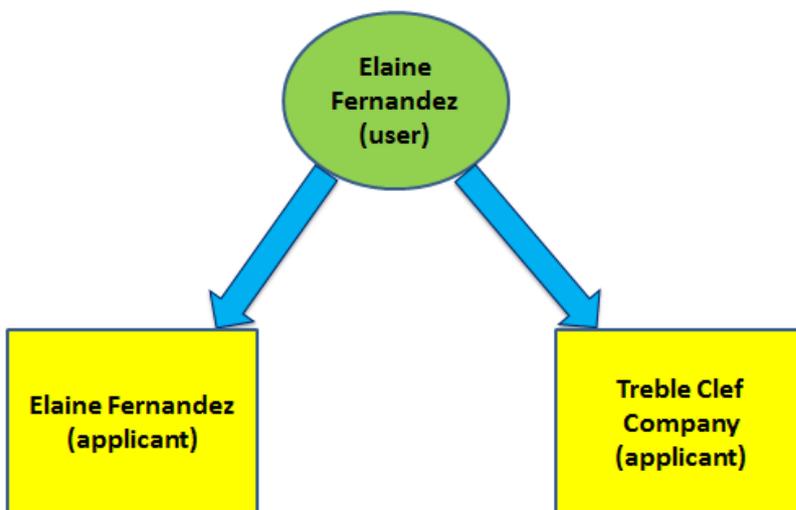
She then creates an applicant called Elaine Fernandez (yellow square).



After the applicant profile is validated, Elaine can make applications as an individual and if successful, manage any grants via the system. If she changes her address or any contact details, she can amend these in her applicant profile.

**A profile for the organisation Elaine works for**

She also creates an organisation applicant profile for the organisation she works for: Treble Clef Company (as shown in the diagram below). She does not need to create another user account, only a new applicant profile.



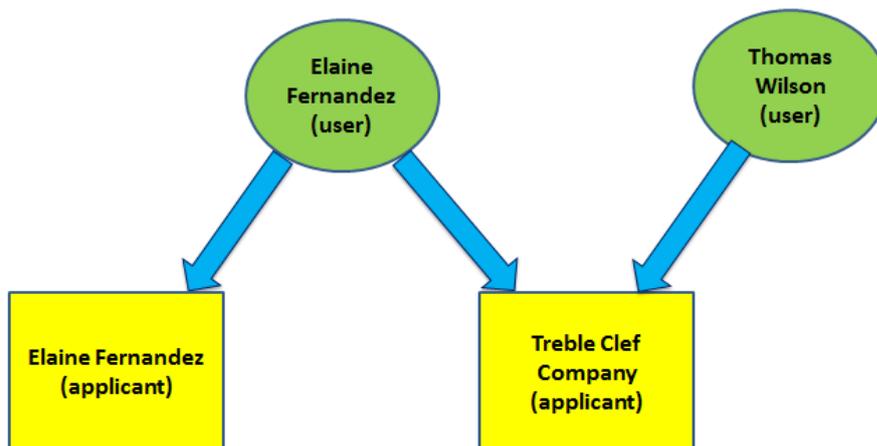
After the applicant profile for the organisation is validated, Elaine can make applications on behalf of that organisation and, if successful, manage any grants

via the system. If she changes address or any of the contact details of the organisation, she can amend these in the organisation's applicant profile.

### Adding another user for Treble Clef Company

Elaine would also like her colleague at the Treble Clef Company to submit and manage grant applications. She asks her colleague, Thomas, to create a user account (the green circle).

Once he has done this, he must let Elaine know **his user name** and **email address**. With this information she can link him as a user to the Treble Clef Company applicant profile, as shown in the diagram below (step by step guidance on [how to link and unlink a user](#) can be found earlier this guidance).



Therefore in this example, Elaine has both access to Elaine Fernandez (the individual applicant) and Treble Clef Company (the organisation applicant). Thomas only has access to the Treble Clef Company applicant.