



# **Grantium guidance for National Portfolio Funding Programme 2018 -22**

## *How to register and create your applicant profile*

*Version 1 – October 2016*

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## Introduction

Arts Council England's new system will replace the current online portal and allow applicants to manage all of their projects online. All applications, along with decision letters, payment requests and any communication regarding your application, will be managed through the online system. This change does not mean applicants and awardees lose someone to speak to but rather it allows us to be more efficient in the way we use our resources. It also allows applicants to have greater control over the information they provide us. This document will take you through all the steps to set yourself up on the system.

Click [here](#) to be taken to Grantium, our new online portal.

## Before you begin

There are three things you need to do to apply on Grantium:

<h3>Register for a funding programme</h3> <p>Select the funding programme you would like to apply for</p> 	<h3>Create a user</h3> <p>This will give you access to the system and should be unique to the person logging into the system</p> 	<h3>Create an applicant</h3> <p>This is the legal entity that can make an application and enter into a grant agreement</p> 
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If you **already have an applicant profile** set up on Grantium you will still need to register for the National portfolio programme. Further information can be found in the [How to complete an application](#) guidance document. The deadline for registering on Grantium is **4pm on 13 January 2017**.

If you **create a new applicant profile**, we will validate your profile which will take up to five working days. Once your profile has been validated you will have access to the eligibility questionnaire and application form.

The simplest way to set yourself up on the system is to click on **Browse Programmes** where you will automatically be taken through each of the above steps. Page 5 onwards will show you how to do this screen by screen.

## Registering for a funding programme

If this is your first time using Grantium, clicking on **Browse programmes** will take you straight to the registration page.

If you already have an applicant profile set up on Grantium you will still need to register for the National portfolio programme. Further information can be found in the [How to complete an application](#) guidance document. The deadline for registering on Grantium is **4pm on 13 January 2017**.

### **What is a user account?**

You create a user account in order to gain access to Grantium. A user account is unique to you and you should not share your log in details with anyone. You only need to create a user account once and should use these details each time you want to log in to the system.

Every person who uses our online system for any purpose (for example to make applications, accept grant offers, or submit reports and payment conditions) must first set up a user account to give them access to the system.

### **What is an applicant profile?**

The applicant is the entity who can make an application and who can enter into a grant agreement, if the application is successful. The applicant name should be the legal name of the organisation. The applicant name must also correspond to a bank account in the same name.

You can have many users connected to your applicant profile. Further information on how to link users to an applicant profile can be found in the [How to give another person access to an applicant you've created](#) document.

### **Validation**

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 ensure there are no discrepancies in the information submitted and so that no duplicate profiles are created on the system. This validation process can take up to five working days. You will receive an email notification when this has been done.

## Browse Programmes – registration wizard

This is the first screen you will see when you access the new online system:

**Front Office Portal**

Username:

Password:

Login

[Forgot your password?](#)

[Browse Programmes](#)

[Create Profile](#)

[Contact Us](#)

### Welcome to Arts Council England

To use the new application portal you must be running the most recent version of your internet browser. To check this please click [www.whatismybrowser.com](http://www.whatismybrowser.com). If your browser is out of date follow the instructions on screen.

Applications to **Grants for the arts** and the **Artists' International Development Fund** should be made using this online application portal. If the programme you are applying for is not on this portal then please [click here](#). If you have already registered with us on this system, please log in using your username and password. If you do not already have a username and password for this system, please click [create profile](#). Please read the [guidance for applicants](#) for the appropriate programme before you begin.

By using the system to make an applicant profile, and/or make an application, you are agreeing that:

- You will keep your own contact details up to date by editing your applicant profile (please see the guidance sheet on our [user accounts and applicant profiles](#) page for more information).
- By adding a user to your applicant profile, please be aware that you are giving them the same permissions to carry out actions using the system that you have. For example, this means that all users who are added to your applicant profile:
  - can write and submit an application on that applicant's behalf;
  - will receive notifications about that applicant's ongoing projects;
  - can view all current and previous applications and post-award submissions for that applicant;
- You can submit an application on behalf of an applicant profile;
- If you are applying for a grant. Other users are not allowed to accept on behalf of an individual applicant unless they have power of attorney. For organisations, only users with delegated authority can accept a grant on behalf of that organisation.
- The user who first sets up an applicant profile is the 'administrator' of that applicant profile, and is responsible for adding other users as appropriate.

If you would like to contact us click [contact us](#).

Grantium's registration wizard will assist you in setting up your profile. To start, click **Browse Programmes** in the navigation bar on the left of the screen.

This opens the registration screen:

Programmes				
Programme Name	Programme Start	Registration Start	Registration End	Register View
AIDF	01-Jan-2009	01-Jan-2009	26-Oct-2016	
Grants for the arts	01-Jan-2009	01-Jan-2009	31-Dec-2018	
National portfolio organisations	31-Dec-2008	01-Jan-2009	31-Dec-2018	
1				

Click the **Register** icon for the National portfolio organisations programme.

You will be asked to identify if this is the first time setting yourself up on Grantium.

If this is your first time using the system and you would like to create a user account and applicant profile, click **Create Profile**. You may ignore everything else on the screen.



The screenshot shows a web form titled "Please identify yourself". It contains the following elements:

- A header bar with the text "Please identify yourself".
- A paragraph of text: "If you do not possess the credentials necessary to identify yourself, please click the button below to create a new user account and applicant profile."
- A button labeled "Create Profile", which is highlighted with a red rectangle. A red arrow points from a callout box to this button.
- A paragraph of text: "If you have misplaced your password and don't remember it, please click the button below to reset your password."
- A button labeled "Forgot your password?".
- A paragraph of text: "Entering your credentials will allow you to access the numerous functions of Grantium™. You will have your personal workspace where you will be able to register and apply to several Programmes on-line."
- Two input fields: "User Name:" and "Password:". Each has a small vertical line in the first position, likely for a cursor or a required character.
- Two buttons at the bottom: "Cancel" and "Save & Next".

The callout box contains the text: "Click here to create your user account and applicant profile".

## User Account

You will be taken to the User Account screen:

The screenshot shows a 'User Account' registration form. It contains the following fields and instructions:

- 1** \* First Name:   
Middle Name:   
\* Last Name:
- \* Email:  **2**  
\* Email Confirm:
- \* Default Application Language:
- 3** \* User Name:   
User Name should be larger than 2 characters and smaller than 51 characters
- \* Password:   
\* Confirm Password:   
Password should be larger than 2 characters and smaller than 11 characters
- \* Personal Confirmation Question:   
\* Personal Confirmation Answer:  **4**

At the bottom are two buttons: 'Cancel' and 'Save & Next'.

Please complete the details, making sure you fill in every field marked with an asterisk (\*).

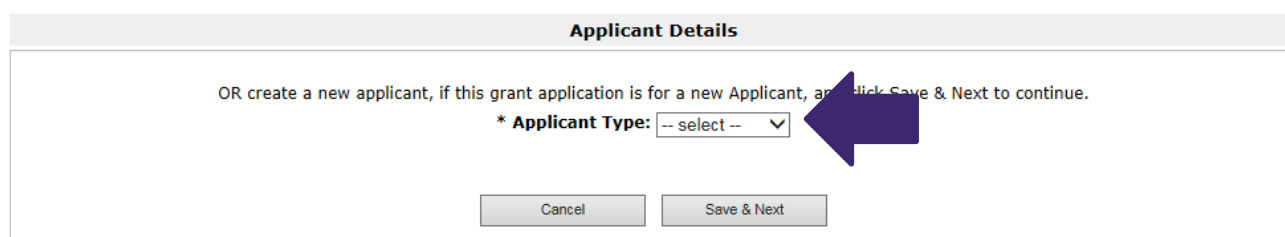
- 1** You must enter your real first and last names in the first fields. (You can choose your own User Name lower down this screen.)
- 2** The email address you enter here is the address to which we will send all notifications for any projects you are involved in. Please enter it carefully, and make sure it is up to date.
- 3** Your chosen user name has to be unique on our system. The system will let you know if the name you have chosen is already taken. You may need to use numbers to ensure your user name is unique.
- 4** The personal confirmation question will act as a security question in case you forget your password. Please choose a question and answer that will be memorable to you.

Please make a note of your user name and password in case you get accidentally logged out.

Click **Save & Next** to continue.

## Applicant Details – applicant type

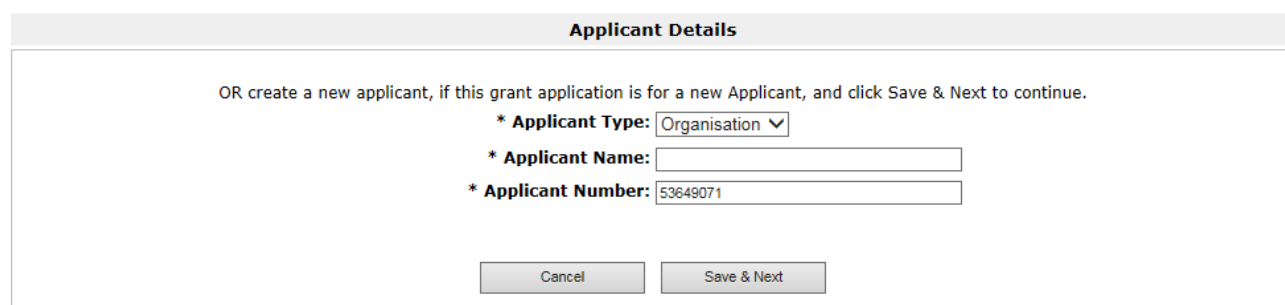
The next screen you will see is the Applicant Details screen:



The screenshot shows a form titled "Applicant Details". At the top, it says "OR create a new applicant, if this grant application is for a new Applicant, and click Save & Next to continue." Below this is a required field labeled "\* Applicant Type:" with a dropdown menu currently showing "-- select --". A large purple arrow points to this dropdown menu. At the bottom of the form are two buttons: "Cancel" and "Save & Next".

Select your **Applicant Type** (organisation) from the dropdown.

You will then be asked to enter the name of your organisation:



This screenshot shows the "Applicant Details" form after the first step. The "Applicant Type" dropdown is now set to "Organisation". Below it are two more required fields: "\* Applicant Name:" with an empty text box, and "\* Applicant Number:" with a text box containing the number "53649071". The "Cancel" and "Save & Next" buttons remain at the bottom.

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

You will automatically be given an applicant number.

Click **Save & Next** to continue.



## Applicant details

Applicant details	
Applicant name:	<input type="text"/>
Applicant number:	53341116
Applicant type:	Organisation ▾
* What is your organisation's legal name?	<input type="text"/>
* What name is your bank account registered in?	<input type="text"/>
Please give any other names your organisation uses:	<input type="text"/>
* Which option most closely describes your organisation?	<div>Choose one option that applies from the following list:</div> <ul style="list-style-type: none"><li><input type="radio"/> Arts organisation</li><li><input type="radio"/> Commercial organisation</li><li><input type="radio"/> Community group</li><li><input type="radio"/> Faith group</li><li><input type="radio"/> Government / public body</li><li><input type="radio"/> Healthcare organisation</li><li><input type="radio"/> Library</li><li><input type="radio"/> Museum</li><li><input type="radio"/> School or college</li><li><input type="radio"/> Youth group</li><li><input type="radio"/> Other</li></ul>
* Which option most closely describes your organisation's status?	<div>Choose one option that applies from the following list:</div> <ul style="list-style-type: none"><li><input type="radio"/> Central government body</li><li><input type="radio"/> Community Interest Company (CIC)</li><li><input type="radio"/> Company limited by shares</li><li><input type="radio"/> Company limited by guarantee</li><li><input type="radio"/> Local government body</li><li><input type="radio"/> Mutual society</li><li><input type="radio"/> Partnership or consortium</li><li><input type="radio"/> Trust or foundation</li><li><input type="radio"/> Unincorporated group</li><li><input type="radio"/> Other</li></ul>
* Which category most closely describes your organisation?	<div>Choose one option that applies from the following list:</div> <ul style="list-style-type: none"><li><input type="radio"/> Amateur or voluntary organisation</li><li><input type="radio"/> Professional organisation</li></ul>
* Are you a registered charity?	<div>Choose one option that applies from the following list:</div> <ul style="list-style-type: none"><li><input type="radio"/> Yes</li><li><input type="radio"/> No</li></ul>
* Are you based within the European Union?	<div>Choose one option that applies from the following list:</div> <ul style="list-style-type: none"><li><input type="radio"/> Yes</li><li><input type="radio"/> No</li></ul>
<div>Save &amp; Back</div> <div>Save</div> <div>Save &amp; Next</div> <div>Check Spelling</div>	

### An important note on bank accounts:

Your organisation **must** have a bank account that:

1. is in your organisation's legal name
2. has two signatories

This is usually a business bank account. We **cannot** make payments for a grant made to an organisation into an individual's bank account.

### An important note on consortia:

If you apply as a consortium, we will only make payments to the named organisation taking the lead in making the application. The organisation which is taking the lead will be responsible for the grant.

You can find out more about our requirements for bank details in the [bank details guidance](#) information sheet, available on our website.

After completing the questions click **Save & Next** to continue.

## Address information

This screen asks for basic contact information. If you choose a UK postcode, you will be asked to make use of the postcode search function.

Address information	
<b>Instructions:</b> In order to use the postcode search, select the checkbox " <b>Click to use postcode search</b> ". Once you have selected an address, you will be able to update the "Address name or number" and the "Street" fields manually. You will be allowed to enter the address manually if your post code does not exist in our database or your address is outside UK.	
* Country:	United Kingdom ▼
Click to use postcode search.	<input type="checkbox"/>
* Address name or number:	<input type="text"/>
Street:	<input type="text"/>
Locality:	<input type="text"/>
* Town / city:	<input type="text"/>
* Postcode:	<input type="text"/>
* Main contact number:	<input type="text"/>
Mobile:	<input type="text"/>
* Email address: (Organisation email address if applicant is an organisation)	<input type="text"/>
Website address:	<input type="text"/>
Fax number:	<input type="text"/>

After completing the required information click **Save & Next** to continue.

## Your contact information

You should enter the names and contact details of any key members of staff here.

Your contact information																											
	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	
Contact name	Main contact			First name			Last name			Primary contact number			Email Delete View														
This list contains no items																											

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

## ► Contact details

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.

Contact details	
* Contact type:	-- select --
Is this the main contact for the applicant?	<input type="checkbox"/>
* First name:	
Middle name:	
* Last name:	
* Position:	
* Primary contact number:	
Alternate contact number:	
Mobile phone number:	
* Email address:	
Fax number:	

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

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

Please note that the contacts listed in this section will not automatically receive correspondence or notifications relating to projects or applications.

Only user accounts linked to the applicant profile receive notifications from the system. The main contact listed here should have a user account that is linked to the applicant profile. Instructions on linking user accounts to applicant profiles can be found in the [How to give another person access to an applicant you've created](#) document and is available on our website.

Click **Save & Back to List** to return to the contact information page. Then click **Next** to continue.

## Financial background

Enter the year in which your organisation was formed and your company number if applicable.

Financial background	
* In what year was your organisation formed?	<input type="text"/>
What is your organisation's company number? (if applicable)	<input type="text"/>

Click **Save & Next** to continue.

## Governance document attachment

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). Please read the information sheet [Governing documents](#) on our website for more information about what we need to see.

To add your governing document, click **Click to add attachment** 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	---		
<input type="button" value="Back"/>		<input type="button" value="Next"/>				

Click **Next** to continue.

## Monitoring information

This screen asks you to enter a figure for the number of members in your senior management team and on your management committee, board, governing body or council. It then asks you to enter a figure for the number of members who make up each of our monitoring sections. It also asks if you consider your organisation to be diversity led. Please select those answers from the relevant dropdowns.

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 your application. We may use this information as part of our decision making process. Where this is the case, it will be stated in the [National Portfolio Investment Programme guidance for applicants](#). Please ensure this information is up to date before starting your application. 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** box.

Once you have answered all the questions click **Save & Next** to continue.

## Declaration

Declaration
<p><b>* I confirm that the information provided is correct and that I am authorised to submit it on behalf of the Applicant.</b> <input type="checkbox"/></p>

Please tick the box to confirm that you are authorised by your organisation to submit the information on its behalf and to create its applicant profile.

Click **Save & Next** to continue.

## Submission summary

The submission summary displays a list of all the steps you have worked through. 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, this will be indicated by a red cross. A hyperlinked statement will tell you what part of each step needs attention. Click on the hyperlinked statement to take you to the step and make your amendments.

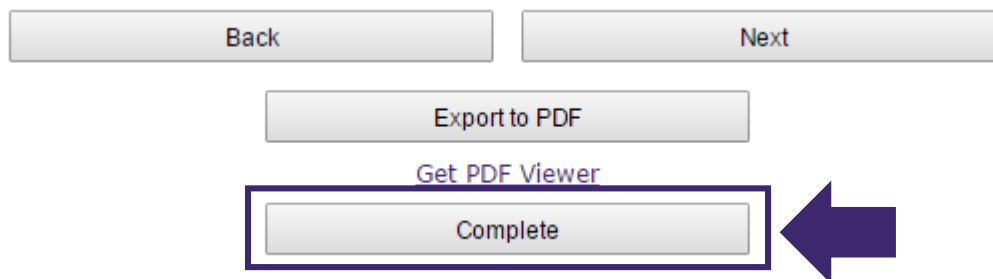
Submission summary			
Complete	Page	Last Updated	Mandatory
✗	<a href="#">Applicant details</a>	Please Complete	Yes
✗	<a href="#">Address information</a>	Please Complete	Yes
✗	<a href="#">Contact information</a>	Please Complete	Yes
✗	<a href="#">Financial background</a>	Please Complete	Yes
✓	<a href="#">Governance document attachment</a>	23/09/2016	Yes
✓	<a href="#">Monitoring information</a>	23/09/2016	Yes
✓	<a href="#">Declaration</a>	23/09/2016	Yes
Notes:			
<ul style="list-style-type: none"><li><a href="#">Contact information list must include at least 1 item(s).</a></li><li><a href="#">There should be only one 'Main Contact' selected. Click here to return to Contact information form.</a></li></ul>			

This example shows an applicant profile where there is missing information in several sections, and so the user can't proceed. They can click on either the note itself or the section names, and can go back and correct this.

## Clicking Complete

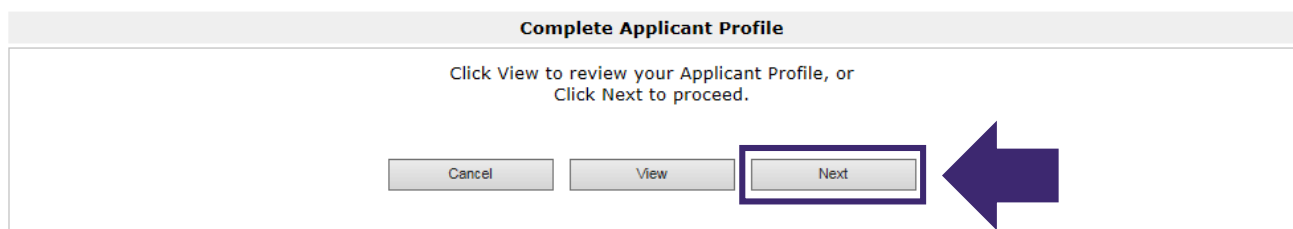
Once you have all green ticks on your submission summary then you are ready to submit your applicant profile.

By clicking **Complete** on the Submission Summary screen, you are submitting your applicant profile to us for validation. Clicking **Next** will take you back to the first screen, you must click **Complete** to end the process.



The next screen will give you the option to exit the registration wizard, view the information you have just entered in your applicant profile or continue to the final step of registration.

You should click **Next** to continue.



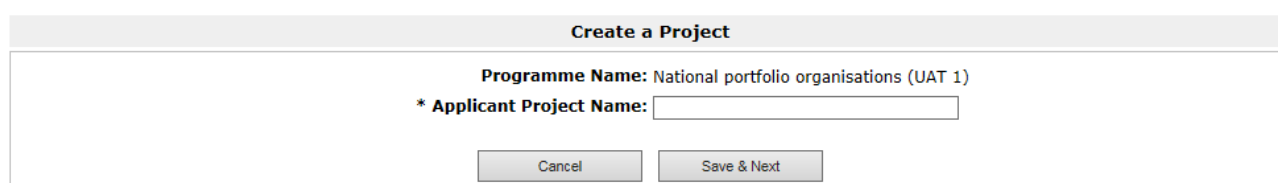
## Create a Project

For your applicant project name you must enter:

**National Portfolio Organisation 2018 - 2022**

The only exception is if you are applying as a Sector Support Organisation. Sector Support applicants should enter:

**National Portfolio Organisation 2018 - 2022 (Sector Support Organisation)**



Create a Project

Programme Name: National portfolio organisations (UAT 1)

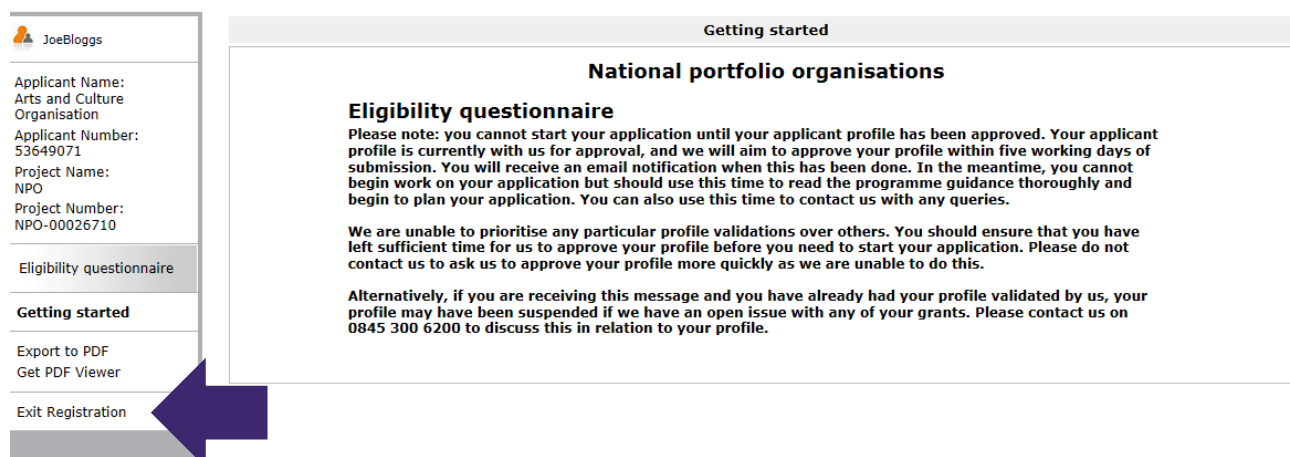
\* Applicant Project Name:

Cancel Save & Next

Click **Save & Next** to continue.

## Eligibility questionnaire

This is the final screen you will see. Until your profile has been validated you will be unable to continue. We will aim to approve your profile **within five working days**. You will receive an email notification when this has been done.



JoeBloggs

Applicant Name: Arts and Culture Organisation

Applicant Number: 53649071

Project Name: NPO

Project Number: NPO-00026710

Eligibility questionnaire

Getting started

Export to PDF

Get PDF Viewer

Exit Registration

Getting started

National portfolio organisations

**Eligibility questionnaire**

Please note: you cannot start your application until your applicant profile has been approved. Your applicant profile is currently with us for approval, and we will aim to approve your profile within five working days of submission. You will receive an email notification when this has been done. In the meantime, you cannot begin work on your application but should use this time to read the programme guidance thoroughly and begin to plan your application. You can also use this time to contact us with any queries.

We are unable to prioritise any particular profile validations over others. You should ensure that you have left sufficient time for us to approve your profile before you need to start your application. Please do not contact us to ask us to approve your profile more quickly as we are unable to do this.

Alternatively, if you are receiving this message and you have already had your profile validated by us, your profile may have been suspended if we have an open issue with any of your grants. Please contact us on 0845 300 6200 to discuss this in relation to your profile.

Click **Exit Registration** to exit the registration wizard.



## FAQs

I forgot my user name – what can I do to get it?	Please contact Customer Services (details below).
I forgot my password – what can I do to get it?	Click on <b>Forgot your password?</b> on the log in screen. You will be prompted to enter your email address. Details will be emailed to you about how to access your account
How can I give other people access to my applicant profile?	The following guidance document will give you further information on how to add users to your applicant profile: <a href="#">How to give another person access to an applicant you've created</a>
I have an applicant profile already set up but have not registered for the National portfolio programme. What should I do?	The following guidance document will give you further information on how to register: <a href="#">Grantium guidance for National Portfolio Funding Programme 2018-22: How to complete an application</a>
How will I know that my applicant profile has been validated?	An email notification will be sent to inform you that your profile has been validated.

## Further information and support

If you have any questions about the information contained in this document or require further assistance, please contact our Customer Services team on:

**Phone:** 0845 300 6200, 0161 934 4317  
**Textphone:** 020 7973 6564  
**Email:** [enquiries@artscouncil.org.uk](mailto:enquiries@artscouncil.org.uk)  
**Website:** [www.artscouncil.org.uk](http://www.artscouncil.org.uk)