

In order to use WISE - Grants you must first be granted access to it. There are two basic ways to get access to WISE - Grants.

You may either:

- 1) Request access to the system and get approved by a WIBOTS system administrator
- 2) Be granted access by your Project Coordinator

It is recommended that the Project Coordinator for your organization first obtain access by following the procedure under section 4.a. Once the Project Coordinator has obtained access to WISE - Grants, they can manually add the remainder of their staff without help from WISE - Grants administrators, as described in section 4.b. Both processes for gaining access are described below.

## 1.a. Gaining access through a system administrator

The first time a Project Coordinator comes to WISE - Grants, they must create a new user account.

To create a new user account:

- 1) From the WISE - Grants homepage click the "New User?" link located in the "Login" section.
- 2) Complete the user form in its entirety.
  - a) Fill in all information as required. All items marked with an '\*' are required to create your account.
  - b) The "Username" field must consist of all letters and numbers.
  - c) The "Password" field must consist of all letters and numbers and must be at least 5 characters long.
  - d) The fields "Password" and "Confirm Password" must be the same.
  - e) The Person who is to be the Project Director or Project Coordinator for the Organization completes the page, including Organization and title. **If Organization and Title is not included it could delay the process.**
- 3) Click "Save" to save the data.



Login

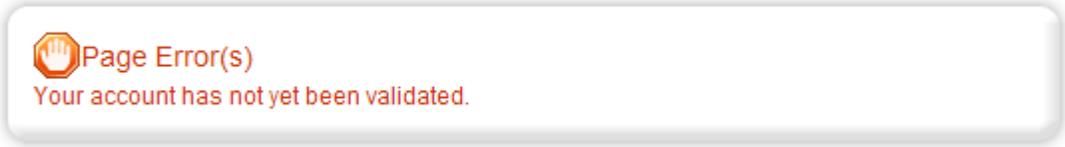
Username

Password

[New User?](#) [Forgot Password?](#)

NOTE: Once the Project Coordinator has created a user account and gained access to the system, they will never have to request access again. There is no need for multiple accounts within WISE - Grants.

Having saved your contact information, your account must then be approved by an administrator before you can access the system. If you attempt to access the system prior to getting approved/validated by a system administrator you will receive the following message:



 Page Error(s)  
Your account has not yet been validated.

## 1.b. Gaining access through another in your organization

The second way in which you can get access to the system is by having a Project Coordinator from your organization add you into the system. In order for this to occur the user must already be in the system and assigned the Project Coordinator security role.

- 1) The Project Coordinator must first log in to the system.
- 2) From the Main Menu the Organization's Project Coordinator must then click the My Organization(s) link on the menu bar.
- 3) Click the name of the organization you would like to add this new user to. Some Project Coordinators may be members of multiple organizations. Each organization would be listed here. Simply click the name of the organization you wish to add this new user to.
- 4) You are now on the Organization page. Click the "Organization Members" tab above the Organization Information section. Click the Add Members tab above the Organization Members list. By default the "Current Members" tab will be active and below it will be listed the various members of the Organization. If the person whose account must be added is not shown, the agency's administrative user should click the "Add Members" tab.

### Organization

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#)

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#### Organization Members

Administrators with the authority to add members to your organization can follow these steps:  
To add a member to your organization, select the **Add Members** link below.  
If a member has already added his/her information in the system, you can search for the member.  
If you need to add a member's information into the system, select **New Member**.  
For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

<input type="checkbox"/>	Person	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/>	<a href="#">Thomas, Mr. Kevin</a>	Project Coordinator	6/30/2010 - <input type="text"/>	Staff, Mr. SPM

- 5) After clicking the "Add Members" tab, the Organization's Project Coordinator should first search for the person that he or she wishes to add by typing in part of the user's name into the "Person Search" box and then by clicking the "Search" button.
  - a) If the user exists he or she will be shown below the search box. The "Selected" checkbox should be checked and the user should be assigned a role and a start date within the agency. Finally, the "Save" button must be clicked in order to add the user.
  - b) If no users were found that matched the search criteria the Project Coordinator should proceed to step 6.
- 6) Having found no match in the system, the Project Coordinator should click the "New Member" button. Basic demographic information must be included for the user that requires an account. When the information has been entered:
  - a) The Project Coordinator can click the "Save" button to add the user to the system but not link them to an agency. After a user is entered into the system the

- Project Coordinator can return to the Organization Members and follow step 6b to link the user to the agency.
- b) If the Project Coordinator wants to add a new user and link them to their agency, they can click the "Save & Add To Organization" button.

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[Current Members](#) | 
 [Add Members](#)

**Person Search**  **SEARCH** **NEW MEMBER**

- 7) To access all of the documents that are linked to an organization, click the Organization Documents tab.

## Organization

Click on the name to view a specific document.

[Organization Information](#) | 
 [Organization Members](#) | 
 [Organization Documents](#)

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### Organization Documents

Sort documents by: -- Select -- **GO**

Document Type	Name	Current Status	Year
Funded Grants	<a href="#">FG-2011-South Ha-00024</a>	Grant Application In Process	2011