User Information Guide

SmartyFile is a free repository tool for grant seekers. As a SmartyGrants user you have the option to create a SmartyFile profile for your organisation.

Contents

Introduction

A SmartyFile profile allows you to:

- Login to SmartyFile and any sites powered by SmartyGrants

- Collaborate with other team members on SmartyGrants submissions

- Set up multiple team members as users for your organisation with different access levels

- Automatically pre-fill your organisational and contact information into SmartyGrants forms

- Manage, view, search and sort submissions across multiple funders in one spot

* Please note that an ABN/NZBN is required to create a SmartyFile organisation profile

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User Registration and Login

Users who are registered with SmartyGrants will already have a login.

To log in, head to app.smartyfile.com.au and use your SmartyGrants user details to login.

Otherwise, to register, head to smartyfile.smartygrants.com.au/applicant/register.

Following registration you will receive an email to your nominated email address which includes a link to access SmartyFile.

Registration

If you already have a SmartyGrants account you do not need to register again. Login with your existing password.

Your Name:

Organisation:

Optional

Email Address:

Confirm Email:

Re-enter your email address to confirm it.

Your password must:

- include at least 8 characters
- include uppercase letters
- include lowercase letters
- include a non-alphanumeric character (i.e., a symbol)

Password:

Confirm Password:
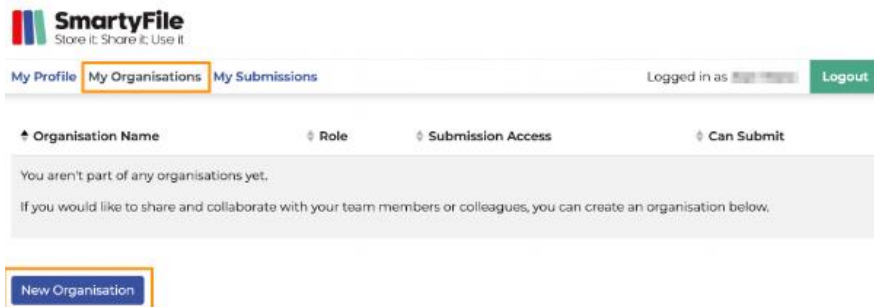
Re-enter your password to confirm it.

By clicking **Register** you agree to Our Community's Privacy Policy and Terms of Use.

[Register]

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Create Your Organisation Profile

Once logged in, you will have the opportunity to create an organisation. To do this, you will need your organisation's ABN.

1. Click on **'New Organisation'** to create a profile.

1. Enter the **ABN** of the organisation you wish to create and click on **'Lookup'**
2. Enter a name for your organisation then select **'Create'** to add your organisation

Complete Organisation Details

These details can be auto-filled into forms (from funders who are powered by SmartyGrants, including Moreton Bay Regional Council), by you or your organisations members when completing submissions. Click on the pencil icon to edit or add details:

- ABN details (auto-filled)
- Contact details
- Bank accounts
- Head of Organisation
- Mission statement
- You can **tag** any of the sets of contact details as **'Primary'**, **'Postal'**, **'Office'** or **'Other'**

Contact Details

- Select **'Add another'** to enter contact details or add an additional contact
- Select contact type e.g. Primary

Pre-Filling Information into SmartyGrants Forms

You can use your organisation or profile information to pre-fill information from your organisation profile when completing a submission through any funder using SmartyGrants (including Moreton Bay Regional Council).

You can still manually update any field that has been pre-filled if you need to.

moretonbay.qld.gov.au

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User Roles

There are five different levels of access that can be assigned to users:

- Administrator
- Author
- Contributor
- Viewer/Analyst
- Custom

Clicking on 'Add User' opens the below dialogue box:

As an Administrator, when assigning a role to a user, you can define their access levels and whether they have permission to make submissions.

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Add or Edit Users (Organisation Members)

Click on the **'Users'** tab. This will list any users with access. An Administrator has access to add/edit/remove users:

- Remove a user by clicking on the X icon under **'Actions'**.
- Edit a user by selecting the pencil icon under **'Actions'**.
- Add a user by clicking on the **'Add User'** button. Enter the email address of the user you wish to add and select the role you wish them to have (user role access is outlined above). Select **'Add'** to complete adding the user.

My Profile

Each user who has a SmartyFile account also has a personal **'My Profile'** section where they can keep their contact details up to date. This information can then be auto-filled into forms from funders who are powered by SmartyGrants.

*Select the pencil icon to edit or add contact information under the **'My Profile'** tab.*

My Submissions

The **'My Submissions'** section will list any submissions that you OR an organisation you belong to have started or submitted.

From here you can search, sort, archive, delete drafts, assign submissions to an organisation, and access forms you have been asked to complete as part of a submission.

Search

You have the ability to search through submissions, type search keywords or a query into the search bar, or use the **'Advanced search'** function to search by multiple search fields, outlined below

On the My Submissions screen, you have the ability to toggle your sort order and can sort your submissions list by:

- Funder
- Application No
- Round
- Project Title
- Due Date
- Submitted Date
- Status

Assign an Existing Application to One of Your Organisations

If you have just created a SmartyFile profile for your organisation, you may have historical applications that you would now like to assign to your organisation.

Click on **'My Submissions'**, select the submission you wish to assign, click on the hamburger icon, and select '**Assign to org**'. Select the organisation and click on '**Assign**' to confirm.

Clicking on 'Assign to org' opens the below dialogue box:

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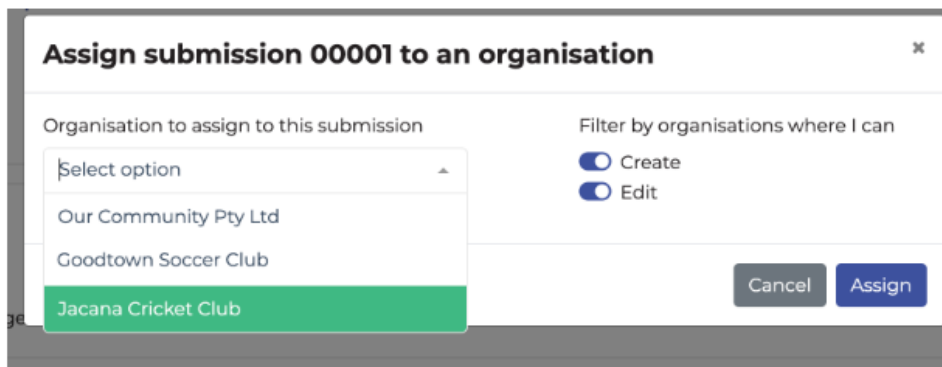
Sharing a Submission

Submissions can be shared with other users of the organisation it is assigned to. Administrators, owners and Authors with access to the submission have the ability to share it with organisation members who have been given the appropriate permission.

To share a submission, navigate to **My Submissions** and click on the hamburger icon on the relevant submission. You will see a **'Share'** option. This will then give you a list of team members of your organisation that you can share the submission with. You can also remove a submission from an organisation:
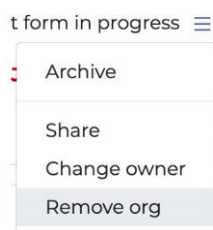
Enabling Multi-Factor Authentication (MFA)

As an extra layer of security, you may require all users who belong to your organisation/s to use an authenticator mobile app (such as Google Authenticator or Authy) each time they log in. To enable multi-factor authentication:

1. Click on the **'Security'** tab of your organisation.
2. Click the toggle for **'Enable Multi-Factor Authentication'**. It will be purple when enabled.
3. Click **'Save'**.

Further information on the use and functions of SmartyFile can be found in the following **Frequently Asked Questions,** or at https://applicanthelp.smartygrants.com.au/smartyfile/**.**

Frequently Asked Questions

How does SmartyFile differ from the SmartyGrants applicant sites?

SmartyFile is a central repository that permits you to access all of your applications through one website. You can still continue to access your applications directly through the various funder applicant websites, but SmartyFile enables you to access a central view of all applications and manage your organisation's users all in one place. When completing an application through SmartyGrants you can also pre-fill information from your organisation profile - bonus!

Do I have to use SmartyFile?

No, SmartyFile is helpful for organisations that have a number of users collaborating on applications or are applying for funding across multiple funders. Different access levels can be set with respect to viewing, editing and submitting forms. However, if you apply for grants as an individual or sole trader and do not collaborate with others on your submissions, SmartyFile is optional. You may still wish to register for SmartyFile if you have an ABN, as you can enjoy the benefits of having all of your applications organised in one place and will have the ability to pre-fill contact information into forms.

How do I know if my organisation has registered for SmartyFile?

If you are not sure whether your organisation is registered in SmartyFile, you can use the lookup function at app.smartyfile.com.au/organisations to check. If your organisation is registered, you can send a message to the existing administrator(s) requesting to join. To do this:

1. Go to: SmartyFile - Home.
2. Log in using your usual SmartyGrants account username and password.
3. Click 'My Organisations' at the top of the page.
4. Click 'New Organisation'.
5. Enter your organisation's ABN or NZBN and click 'Lookup'.

How do I find out who my SmartyFile administrators are?

If you are not sure whether your organisation is registered in SmartyFile, see "How do I know if my organisation has registered for SmartyFile?". If you have already been added to a SmartyFile organisation, but you are not sure who your SmartyFile administrator(s) is/are:

1. Go to: SmartyFile - Home.
2. Log in using your usual SmartyGrants account username and password.
3. Click 'My Organisations' at the top of the page.
4. Click an organisation.
5. Click 'Users' at the top of the page.

If you discover someone on your SmartyFile account who is not known to your organisation, is there a way to delete them?

Once a SmartyFile organisation account has been created, users can only be added with authorisation from an Administrator. An Administrator can also delete users.

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Do I have to pay to use SmartyFile?

No. This is a free service for SmartyGrants Applicant Users.

How do organisations manage who sets up a SmartyFile in their name?

It is up to members of the organisation to decide who sets up their SmartyFile profile. Users can opt to remain as a personal SmartyFile user (without creating an organisation), or they can join an existing SmartyFile organisation, or they can create a new one. It is made clear to any user creating an organisation that they will be the Administrator of that organisation's account. As Administrator, they will have authority to manage the organisational profile, invite additional users (including additional Administrators) and manage their organisation's permission levels. The original Administrator's permissions can be changed by another Administrator if required.

What happens if the SmartyFile account Administrator leaves the organisation?

Each account can have multiple Administrators. It is up to those Administrators to keep user permissions up to date. If an Administrator leaves the organisation, another Administrator can remove them from the SmartyFile organisation account. If all Administrators have left and are not able to be contacted to amend permissions, an Applicant can contact the SmartyFile Support Team to formally request changes to the organisation Administrator.

Are funders notified if any of my organisation's contact details are updated in SmartyFile?

No. if you have an application already submitted and it is appropriate to ensure the funder knows your details are updated, you will need to update the funder directly.

SmartyFile Support

Further information: Help Guide for Applicants (smartygrants.com.au)

Need technical support or help with managing your account?

Phone: +61 3 9320 6888
Email: service@smartyfile.com.au

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