Quick Reference Guide

Setting Up in EdGrants Online

1. **Go to the [EdGrants Online](#) home page**
2. Click **Register now** beside Don't have an EdGrants account?

3. **Register an account**
- Enter your email address and name
- Create a password with at least 10 characters, including uppercase and lowercase letters, numbers, and symbols.
- Tick 'I'm not a robot'
- Click Register an account

4. **Check your Email for confirmation of your registration**
- In the email 'click here to activate your account'
- You will be taken to the below page to select '**Log in**'

5. **Enter your new username and password**

Setting Up

This guide will help you to:

- Create your account in EdGrants Online
- Manage your personal profile and settings, including Multifactor Authentication.
- Set up your Grantee and beneficiary organisations

6. **Set up Multifactor Authentication**
   (MFA – secure access)
   - NOTE this step will involve using a mobile device. Follow the steps on the screen and click Submit when complete.

7. **Agree to the Terms**
- Read and agree to the license agreement and privacy statement.

8. **Start using EdGrants Online**
- You will now be taken to the main page, where a short tutorial will guide you through the platform.

How to manage your personal profile

Follow these steps to manage and update your personal profile in EdGrants Online:

1. **Access your profile**
   - Click on your avatar (a circle with your initials) in the top-right corner of the screen.
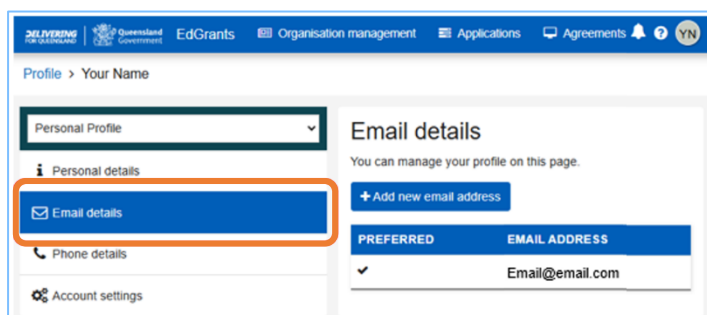   - Select 'Manage profile' from the dropdown menu.
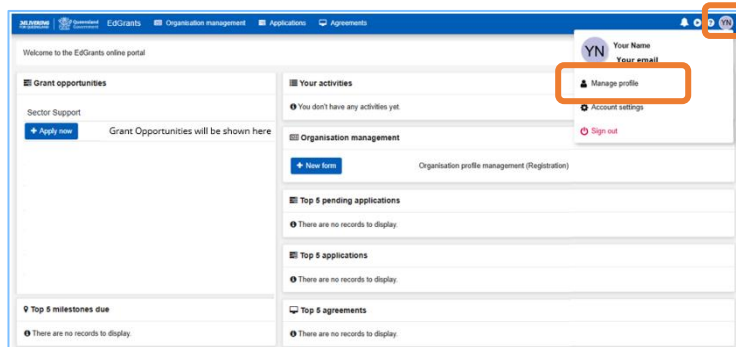
2. **Update Personal details**
   - Review your personal details on the profile page.
   - If updates are required, make the necessary changes.
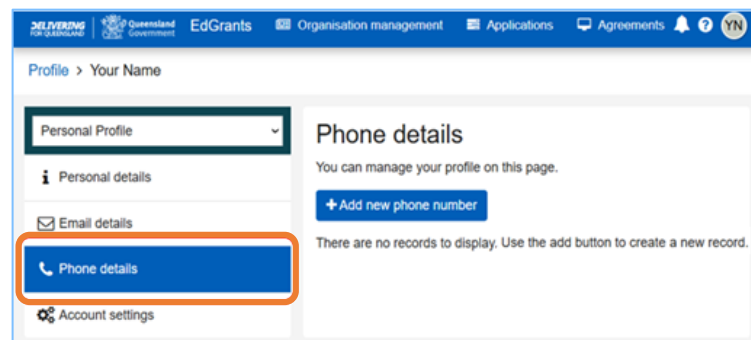   - Click 'Save' to confirm your updates.
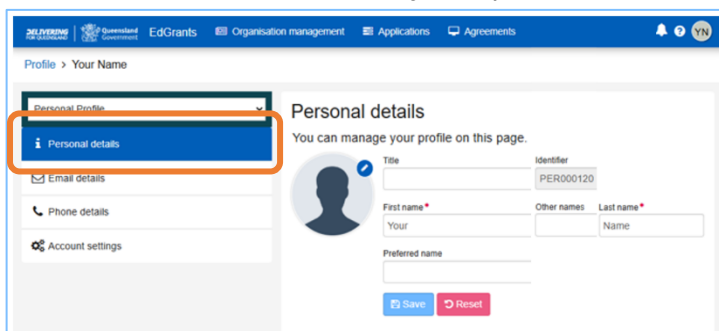
3. **Manage Email details**
   - On the left-hand menu, select 'Email details'.
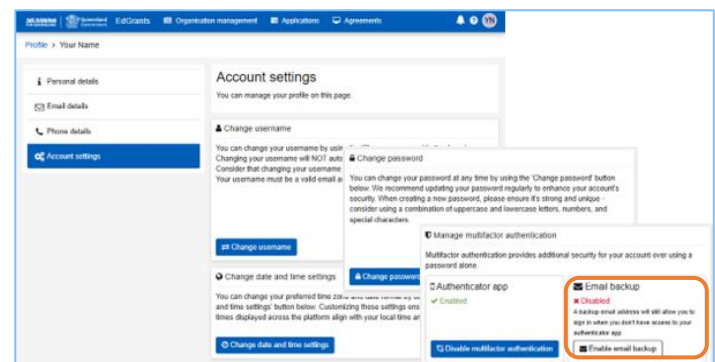   - Review or update your email information as needed.

4. **Manage Phone details**
   - On the left-hand menu, select 'Phone details'.
   - Review or update your phone information as needed.

5. **Manage Account settings**
   - On the left-hand menu, select 'Account settings'. This page allows you to:
   - Change your username.
   - Change your password.
   - Adjust date and time settings if necessary.

**Did you know you can add an *Email Backup* for MFA?**

- In the Manage Multifactor Authentication section, click 'Enable Email Backup'.
- Follow the On-Screen Instructions - A pop-up window will appear with steps to enable email backup.
- Next Login - Choose Your MFA Option

Setting up your Organisations

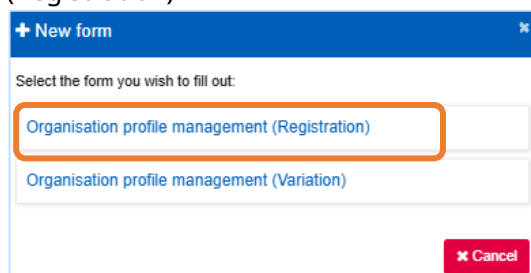Follow these steps to register new organisations in EdGrants Online:

1. Access the Organisation Management Page
- Login to EdGrants online
- Navigate to the Organisation Management page.
- Click 'New Form'.
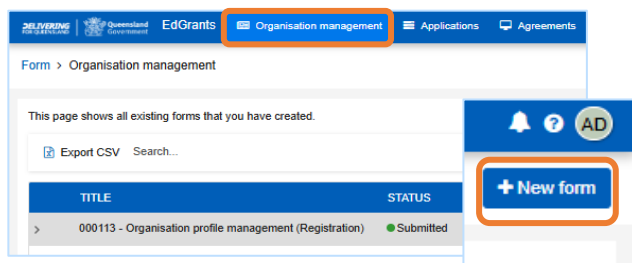
2. Select the Registration Form
- Choose 'Organisation profile management (Registration)'

3. Complete the Organisation Registration Page
- Click either 'Next' or 'Organisation (Registration Page)' on the left-hand menu bar.
- Fill in all the required fields for the **Grantee organisation** and click 'Next' to proceed.

Did you know?
Your Grantee organisation will have an ABN but the beneficiary organisation will not.

Authorised Person is the designated person with full authority to act on behalf of the organisation, including signing agreements, approving and completing applications and has full access to EdGrants. The Authorised Person is accountable for approvals and compliance.

Responsible Person is linked by the Authorised Person during registration. Their duties often overlap with the Authorised Person, but only the Authorised Person can submit applications and agree to Terms & Conditions. You can only have one authorized person per organization but multiple responsible people.

4. Add Organisation Contacts
- Enter the contact details for this organisation.
- Complete all required fields, then click 'Next'.

Note: System role: Select 'Responsible Person' if contact will be an EdGrants system user, or 'Other Contact' if not. When an Organisation contact email is new in EdGrants and will do a 'Responsible Person' role in the system, they will be emailed to set up a password to access the EdGrants Online system.

5. Skip Attachments
- No attachments are required for this step. Click 'Next' to proceed.

6. Preview and submit the Form
- Click 'Preview' to generate a zip file.
- Download the zip file and open it to view the PDF document, review and submit.
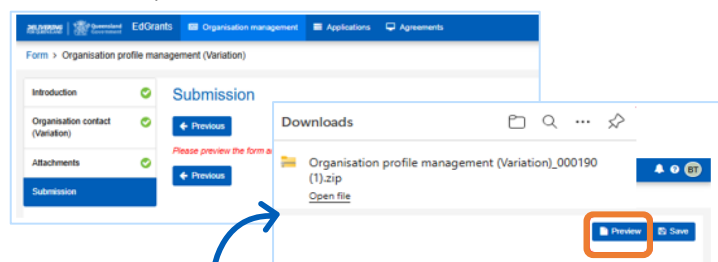
Note: Always check the PDF, then click *Submit in EdGrants*. You'll then be redirected to your submitted forms.

7. Repeat all steps to set up your beneficiary organization/s.

Need to know more?
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