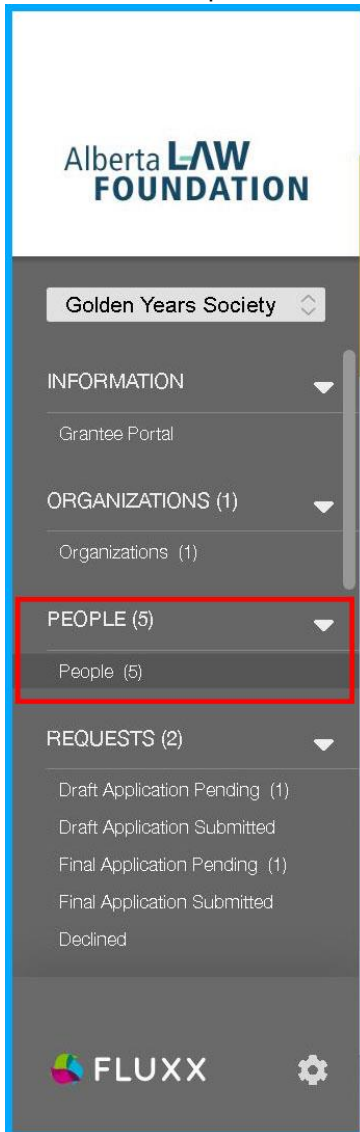


## Grantee Portal Training Manual

### How to Create Users and Update User Information

#### Creating Users

1. Log into the Grantee Portal using a primary contact account.
2. Click on the "People" card under the "People" section in the left side menu.



3. Click on the “Create New” button on the lower right side.

The screenshot displays the user management interface for the Alberta Law Foundation. On the left is a navigation sidebar with categories like INFORMATION, ORGANIZATIONS (1), PEOPLE (5), and REQUESTS (2). The main content area is split into two panes. The left pane shows a list of users: Bridget Jones (Program Coordinator), Test Person (Golden Years Society), Joshua Test (Board), and Joshua Test 2 (Golden Years Society). The right pane shows the detailed profile for Bridget Jones, including contact information such as First Name (Bridget), Last Name (Jones), Title (Program Coordinator), Email (jcorpuz@albertalawfoundation.org), and Phone (780-456-2386). At the bottom right, a 'Create New' button is highlighted with a red box.

4. In the new window, fill out the necessary fields (red box) and any other fields that you want to fill out in the form.

The screenshot shows a user information form with a dark blue header bar. The header bar contains the labels "Title:" and "Email:" on the left, and "Phone:" on the right. Below the header bar is a section titled "Contact Information". This section contains several input fields: "Prefix", "First Name", "Middle Initial", "Last Name", "Suffix", "Title", "Email", and "Phone". The "First Name", "Last Name", and "Email" fields are highlighted with red rectangular boxes. Below the "Contact Information" section is a section titled "▼ Alternate Address (If Different from Organization)". This section contains input fields for "Personal Street Address", "Personal City", "Postal Code", "Country" (with a dropdown menu showing "Canada"), and "State/Province" (with a dropdown menu). At the bottom of the form, there are three buttons: "Cancel", "Save and Continue", and "Save and Close".

- When you are finished with inputting information, click the “Save and Close” button at the bottom right to add the new user to the system.

The screenshot shows a user creation form with a dark blue header bar. The header bar contains labels for 'Title:', 'Email:', and 'Phone:'. Below the header is a section titled 'Contact Information' with input fields for Prefix, First Name, Middle Initial, Last Name, Suffix, Title, Email, and Phone. Below this is a section titled '▼ Alternate Address (If Different from Organization)' with input fields for Personal Street Address, Personal City, Postal Code, Country (set to Canada), and State/Province. At the bottom right, there are three buttons: 'Cancel', 'Save and Continue', and 'Save and Close'. The 'Save and Close' button is highlighted with a red border.

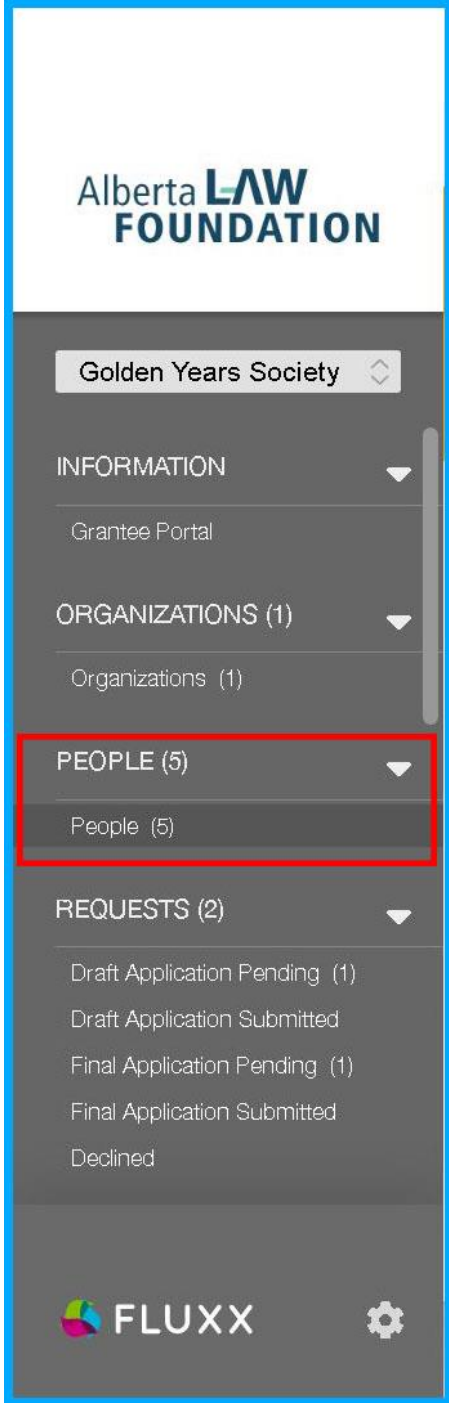
- Finally, have your new user go through the new password creation process to log into the system. If you do not know how to do this, please refer to the How to Log in for the First Time training manual.

Notes:

- The email that you entered in the form is the same email that your added user will have to enter when going through the password creation process. It is also their username when they are logging into the system in the future.

## Updating User Information

Click on the “People” card under the “People” section in the left side menu.



1. Select the user whose information you would like to change.
2. Click on the “Edit” button on the upper right side.

The screenshot displays the Alberta Law Foundation user management system. On the left is a navigation sidebar with categories: INFORMATION (Grantee Portal), ORGANIZATIONS (1) (Organizations (1)), PEOPLE (5) (People (5)), and REQUESTS (2) (Draft Application Pending (1), Draft Application Submitted, Final Application Pending (1), Final Application Submitted, Declined). The main content area is divided into a list of users and a detailed view of the selected user, Bridget Jones. The list includes:

- Bridget Jones**  
Title: Program Coordinator  
Golden Years Society  
Email: jcorpuz@albertalawfoundation.org  
Phone:
- Test Person**  
Title:  
Golden Years Society  
Email: tperson@gys.ca  
Phone:
- Joshua Test**  
Title: Board  
Golden Years Society  
Email: joshuacorpuz25@gmail.com  
Phone:
- Joshua Test 2**  
Title:  
Golden Years Society  
Email: jtest2@alf.ca  
Phone:

The detailed view for Bridget Jones shows:

- Bridget Jones**
- Title: Program Coordinator  
Golden Years Society
- Email: jcorpuz@albertalawfoundation.org  
Phone:

The 'Contact Information' section includes:

- Prefix:
- First Name: Bridget
- Middle Initial:
- Last Name: Jones
- Suffix:
- Title: Program Coordinator
- Email: jcorpuz@albertalawfoundation.org
- Phone: 780-456-2386

An 'Edit' button is highlighted with a red box in the top right corner of the user list. At the bottom right of the interface is a 'Create New' button. The footer shows 'FLUXX' and a pagination indicator '1 - 5 of 5'.

3. Edit any of the fields within this form. When you are satisfied with your changes, you can click on the "Save and Close" button on the bottom right to save your changes.

**Bridget Jones**

**Title:** Program Coordinator  
**Golden Years Society**

**Email:** jcorpuz@albertalawfoundation.org  
**Phone:**

**Contact Information**

Prefix:

**First Name:**

Middle Initial:

**Last Name:**

Suffix:

Title:

**Email:**

Phone:

**▼ Alternate Address (If Different from Organization)**

Personal Street Address:

Personal City:

Postal Code:

Country:

State/Province:

Cancel Save and Continue **Save and Close**

**Notes:**

- Make sure that your email field is not empty because this is the email address that the system matches to the email address that you enter when you are creating/resetting your password. This is done to make sure that it is sending the password link to someone who is in the system.