Managing Organization Profiles – Adding Team Members

Welcome to VanApply, the City's Arts, Culture and Community Services online system for grants, awards, and artist commissions.

An **Organization Profile** allows multiple contacts within your organization to be added to VanApply. Once added, members can preview programs, contribute to and/or submit applications to grant programs on behalf of the organization.

1. Organization Profile Roles

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Primary Administrator	This organization member creates the Organization Profile and has full administrative control over the organization's members and applications. They will be able to edit or remove members of the organization at any time. The primary administrative role can be transferred to a different member, and you can add and remove members of the organization at any time. Examples: Executive Director, Fundraising Leads, etc. **NOTE:** They will be the primary contact for that organization and will receive communications about when applications open, application status and funding decisions.
Administrator	These members have similar control over the organization's members and applications as the *Primary Administrator*. However, they will only be able to add and remove *Non-Administrative Members*, or inactive *Administrators*. Examples: Office Manager, Board Member, etc.
Non-Administrative Members	These members will be able to edit applications on behalf of the organization, but will not have access to manage the *Organization Profile* and members. They will also not be able to create or submit applications for an organization, but will be able to complete sections of an application already in process. Examples: Finance/Accounting, Staff/Volunteer, Grants Writer, Board Member, etc.

> **TIP FOR ORGANIZATIONS**
>
> Primary Administrator and Administrators can apply and submit applications.
> Non-Administrative Members can contribute to applications, but cannot submit for the organization.

2. Managing your Organization Profile

To manage the **Organization Profile** and access the **Manage Organization** section, please make sure the Organization Profile is selected.
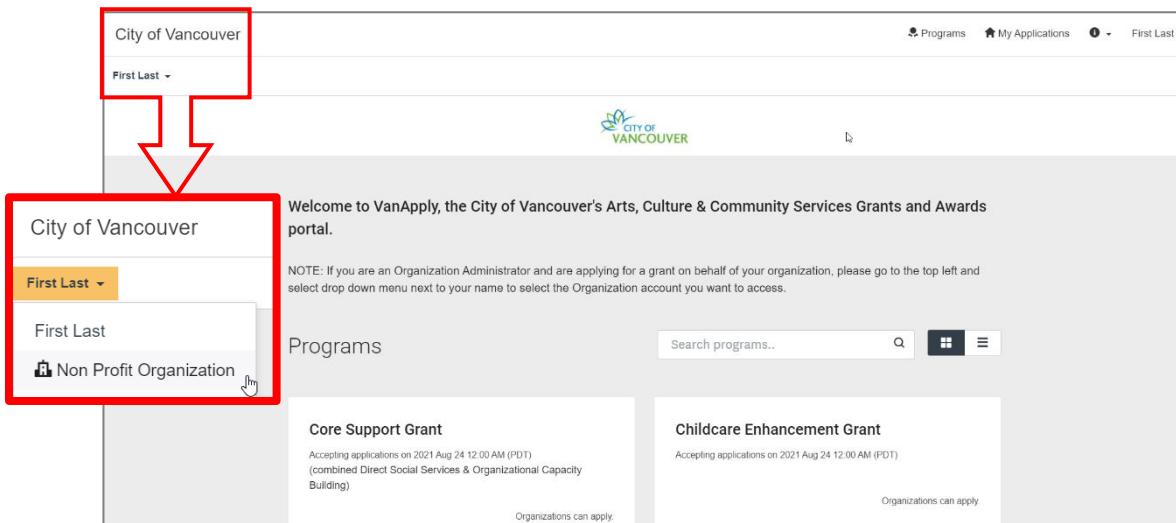

This will enable access to **Manage organization**.
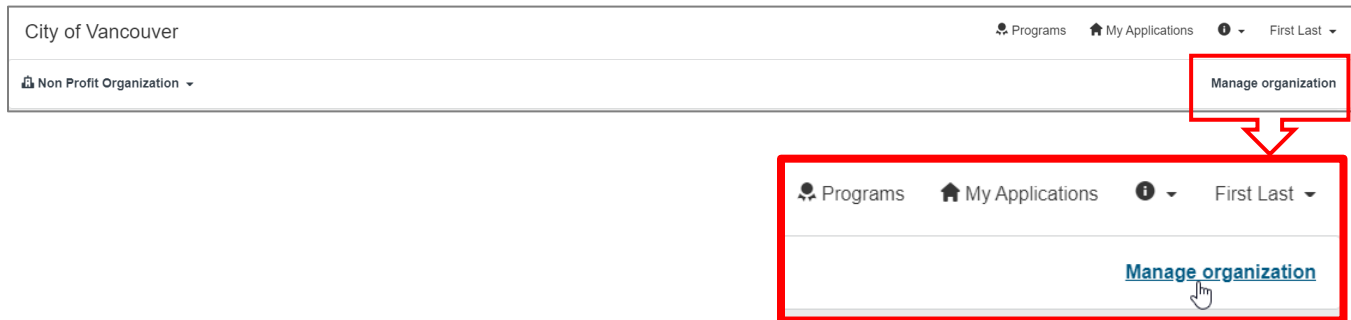
Click on **Manage organization** and you will be able to access the following:

- Profile – Update your organization information and general contact info
- Members – Add multiple team members from across your organization
- Teams – Create teams within your organization to coordinate applications
- Eligibility – Update your organization's eligibility and preferences
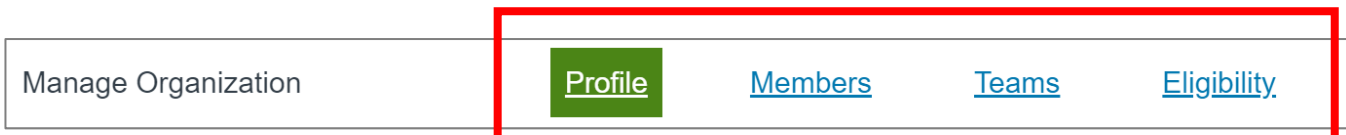
3. Adding members to your Organization Profile one at a time

Go to **Manage organization** near the top right corner of the screen.
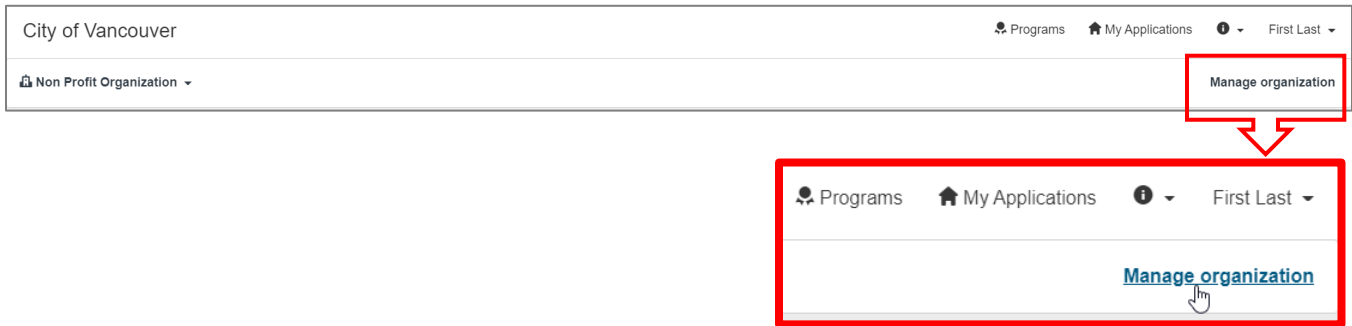
Click on **Members**

Click on **Add Member**
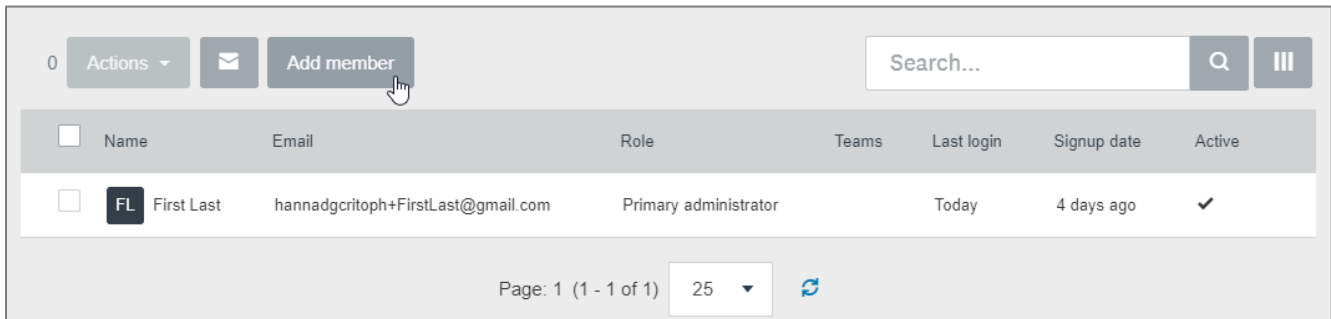
Enter the **First Name, Last Name,** and **Email Address** of the member

Select if they will have Administrative or Non-Administrative Access.
See above **Organization Profile Roles**

Optional: If you have teams created, click to add members to a team.

Select Notify the user that you are adding them to the organization. **Click Add**.

Select **Include a custom message in the email** to send a quick message including the reasoning for inviting them to the site.

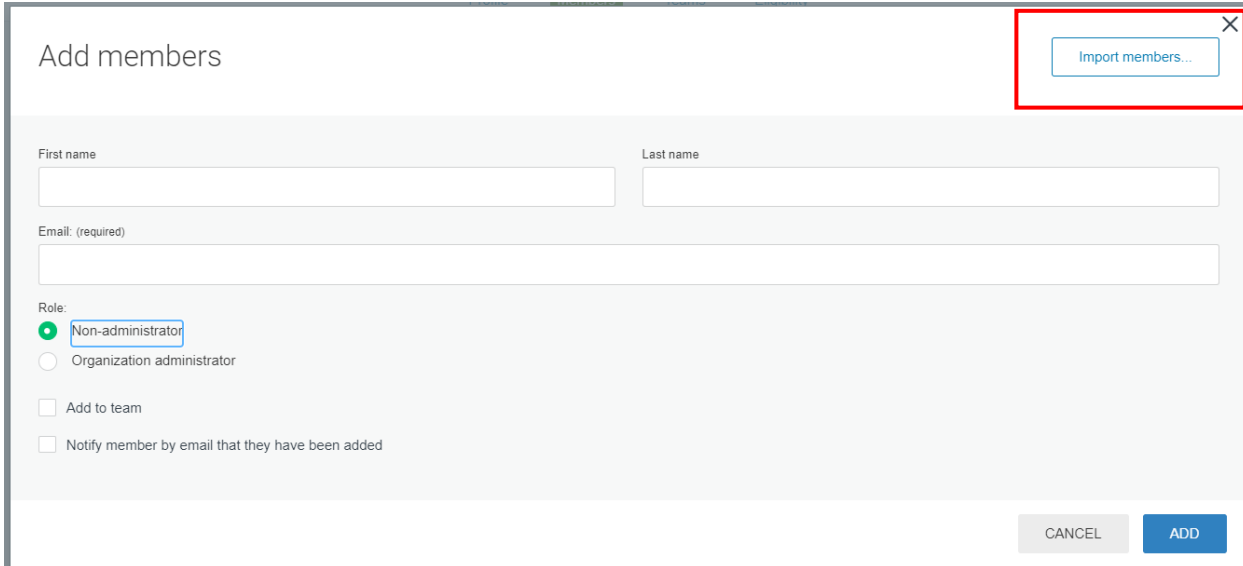## 4. Adding multiple team members to your Organization Profile

Click on **Add Member**

Click on **Import Members** on the top right

Click to **Download Template (.csv file).**

The system will download a file for you to fill out with the Email, **First name, Last name, Access (non-administrator, administrator;** see above for descriptions**).**

Once you have saved the file on your computer, select **Choose File** under **Upload your populated organization template:**

Choose what you would like to do with **Duplicate Entries**.

Select **Notify user by email that they have been added.**

Select **Include a custom message in the email** to send a quick message including the reasoning for inviting them to the site. The same message will be sent to all users in the CSV file.

5. Activate a member

In order for members to be created and edit an application for the organization, they will need to be activated as a member of the organization. When a member is invited they will receive an email and be able to activate their account.

As an organization administrator, you will also be able to activate your members account to ensure that when they log in they can access the organization:

In **Manage Organization** (top right corner), go to Members and click on More Options OR select the member(s) and click **Actions; c**lick **Activate** .

6. Other functions in Manage organization

Once members are added to your Organization Profile, you can assemble them into teams to apply for and submit grant applications.

As a **Primary Administrator** or **Administrator**, you can also update your **Organization Profile** and **Eligibility Profile** at any time. This is to keep your Organization Profile current.

For more information: **Managing your Organization FAQ**

Managing Organization Profiles – Updating Eligibility

Need help?

If you have any questions about VanApply, Arts, Culture and Community programs or if you need support, we are here to help:

- Monday to Friday, 9am to 5pm
- Email: vanapply@vancouver.ca
- **Applying for grants on VanApply: help guide**