Canada Council
for the Arts

Conseil des arts
du Canada

Introduction to the Portal

E-INT-001

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Bringing the arts to life
L'art au cœur de nos vies

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Overview

This course introduces users to the client portal and provides a foundational understanding of its purpose, structure and key features.

Objectives

- Understand the purpose of the client portal and how it supports the funding process
- Navigate the portal's main sections and locate key tools
- Explore where to browse funding opportunities and manage applications
- Learn how to view funding results and manage your account
- Access help resources and support options within the portal

Key terms and concepts

The following table explains key terms used in this guide.

Key Term	Definition
Funding opportunity	Previously called "program component," refers to a specific grant, prize, or financial resource made available by the Canada Council for the Arts to support projects, research, or initiatives
Competition	An assessment cycle (e.g. a deadline)
Application	Submitted by a person, group or organization on the external portal to obtain funding or grants
Funding awards	Previously called "successful applications," refers to grants and funds that have been approved and awarded
Cases	Cases are records that are used to track and manage customer communications such as questions or feedback. They are often used in customer service and support processes.
Assessor self-nomination	Individuals who put themselves forward to evaluate applications and nominations for grants, prizes and strategic funds in the arts, culture, social sciences and humanities.

1. Overview of the Portal

1.1 What is the portal?

1.2 What can you do in the portal?

1.1 What is the portal?

The portal makes it easier for individuals, groups and organizations to apply for funding. It's a one-stop tool designed to help art professionals find the financial support they need to bring their projects to life and grow their careers.

Designed to assist art professionals in searching and applying for funding opportunities, the portal offers a user-friendly experience that simplifies account, application and award management.

1.2 What can you do in the portal?

The portal offers several key features to help you manage your funding journey from start to finish:

- Efficiently navigate various funding opportunities

- Submit applications with all required documentation

- Track and report on funding awards and payments

- Securely manage your banking information

- Submit assessor self-nominations with relevant qualifications

2. Accessing and navigating the portal

2.1 As a guest user

2.2 As a signed in user

2.1 As a guest user
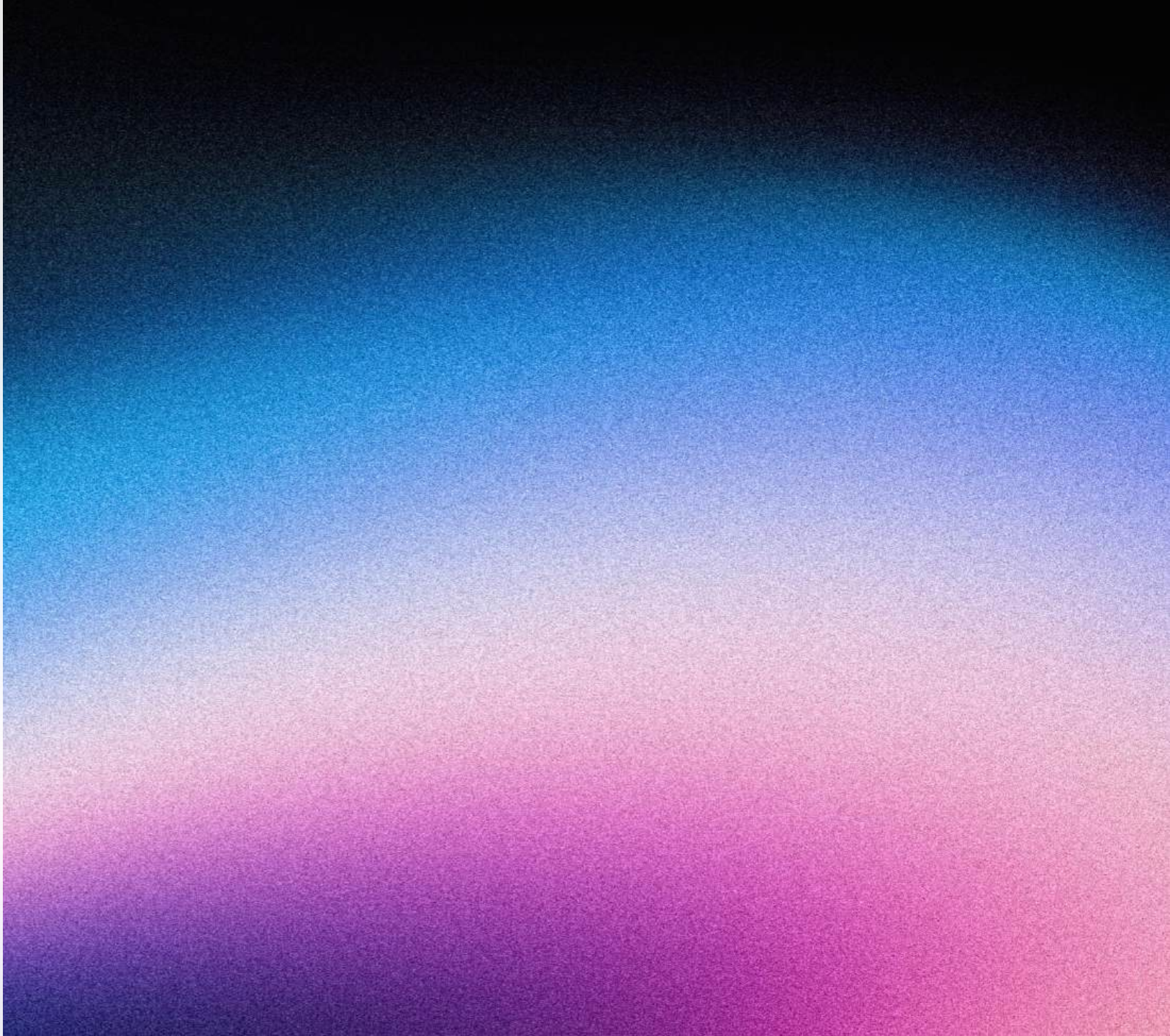
Welcome to the portal as a guest user

You can access the portal without creating an account.

As a guest user, you can view various pages, including Home, Browse Funding and Prizes and Help.
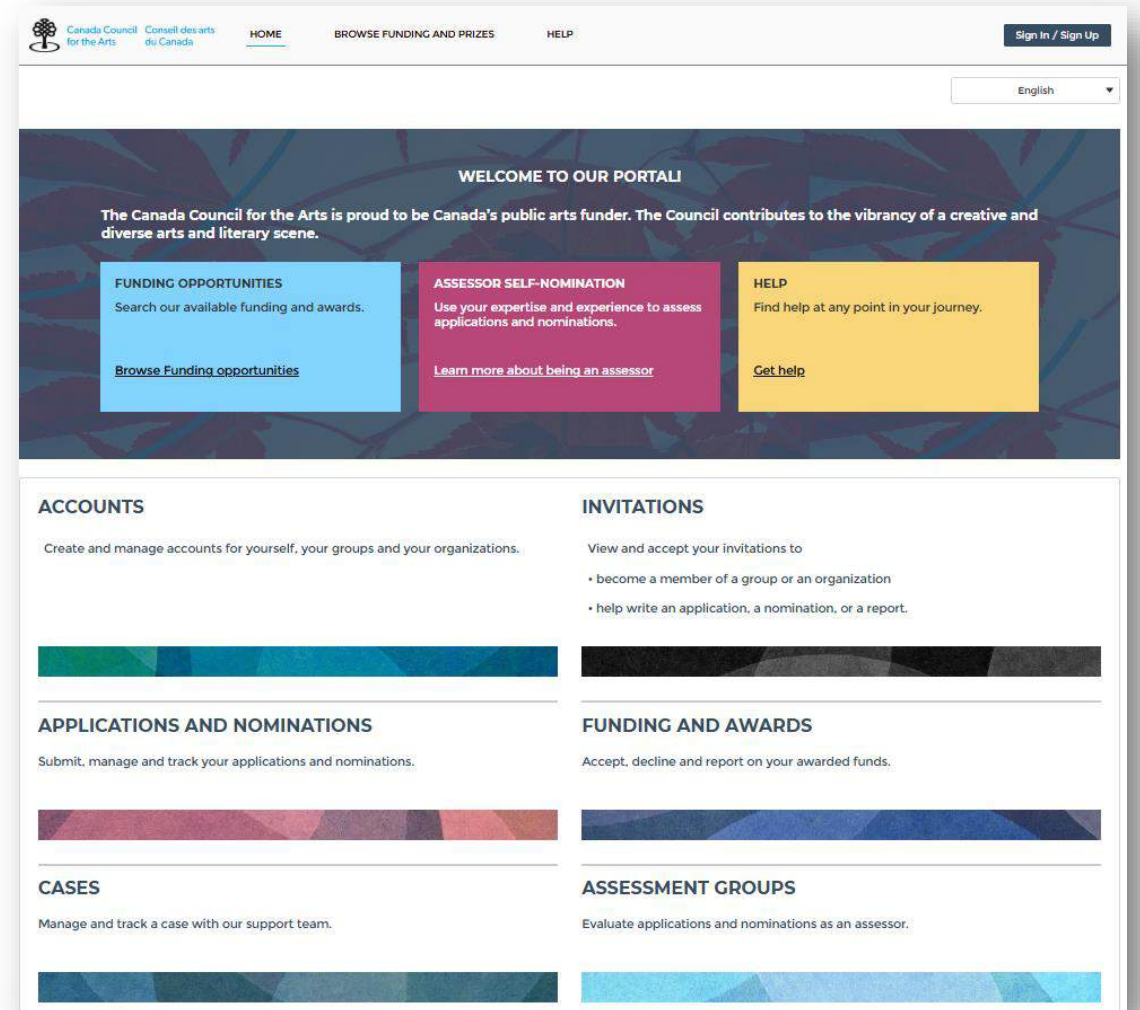
Portal header

The top navigation header of the portal is designed to provide quick and easy access to essential features. It includes several key items to help you navigate the portal efficiently:

- **Home** to return to the homepage

- **Browse Funding and Prizes** to explore available funding opportunities

- **Help** to request assistance

- **A Sign In / Sign Up** button to create an account and sign in to it

- **A language** drop-down menu to select the language you wish to view the portal in: **English** or **French**
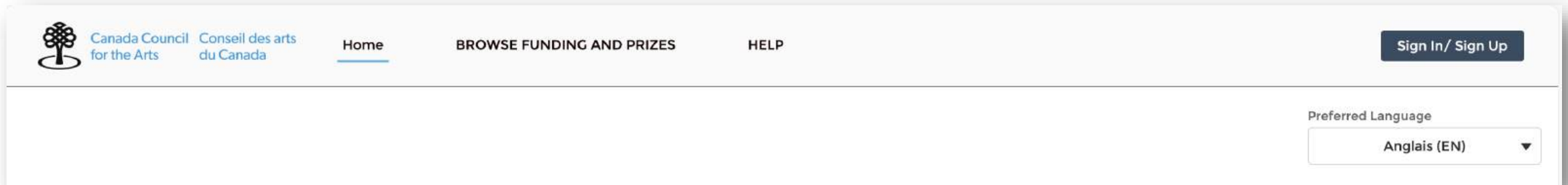
Home page

As the landing page, the homepage is your central hub for accessing a wide range of tools and resources.

The homepage provides direct links to:

- browse funding opportunities
- learn about being an assessor
- get help
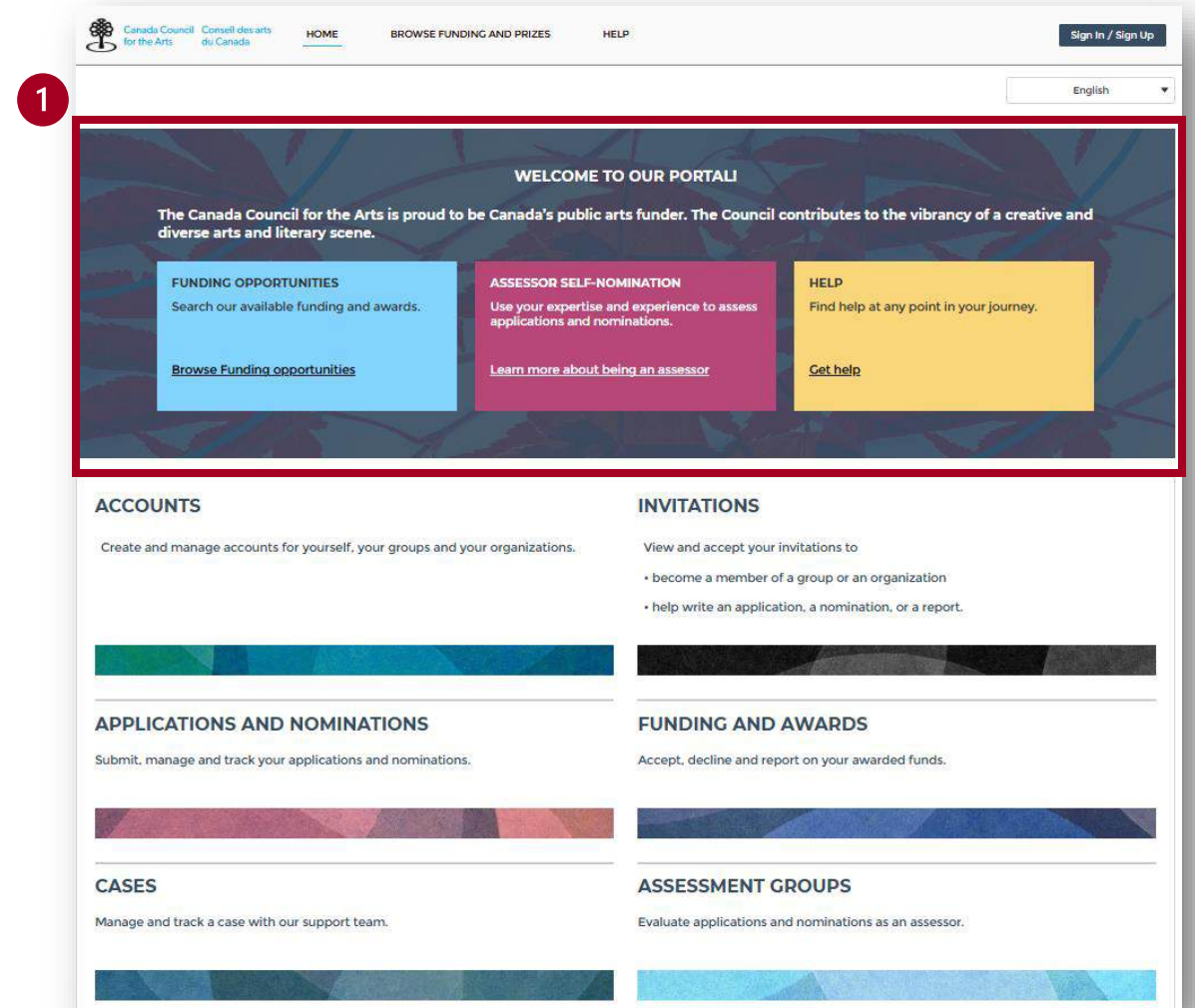
Homepage

This page also offers a concise overview of the various actions you can perform on the portal:

- **Accounts**: Create and manage accounts for yourself, your groups and your organizations
- **Invitations**: View and accept your invitations
- **Applications and nominations**: Submit, manage and track your applications and nominations
- **Funding and awards**: Accept, decline and report on your awarded funding
- **Cases**: Manage and track a case with our support team
- **Assessment groups**: Assess applications and nominations as an assessor
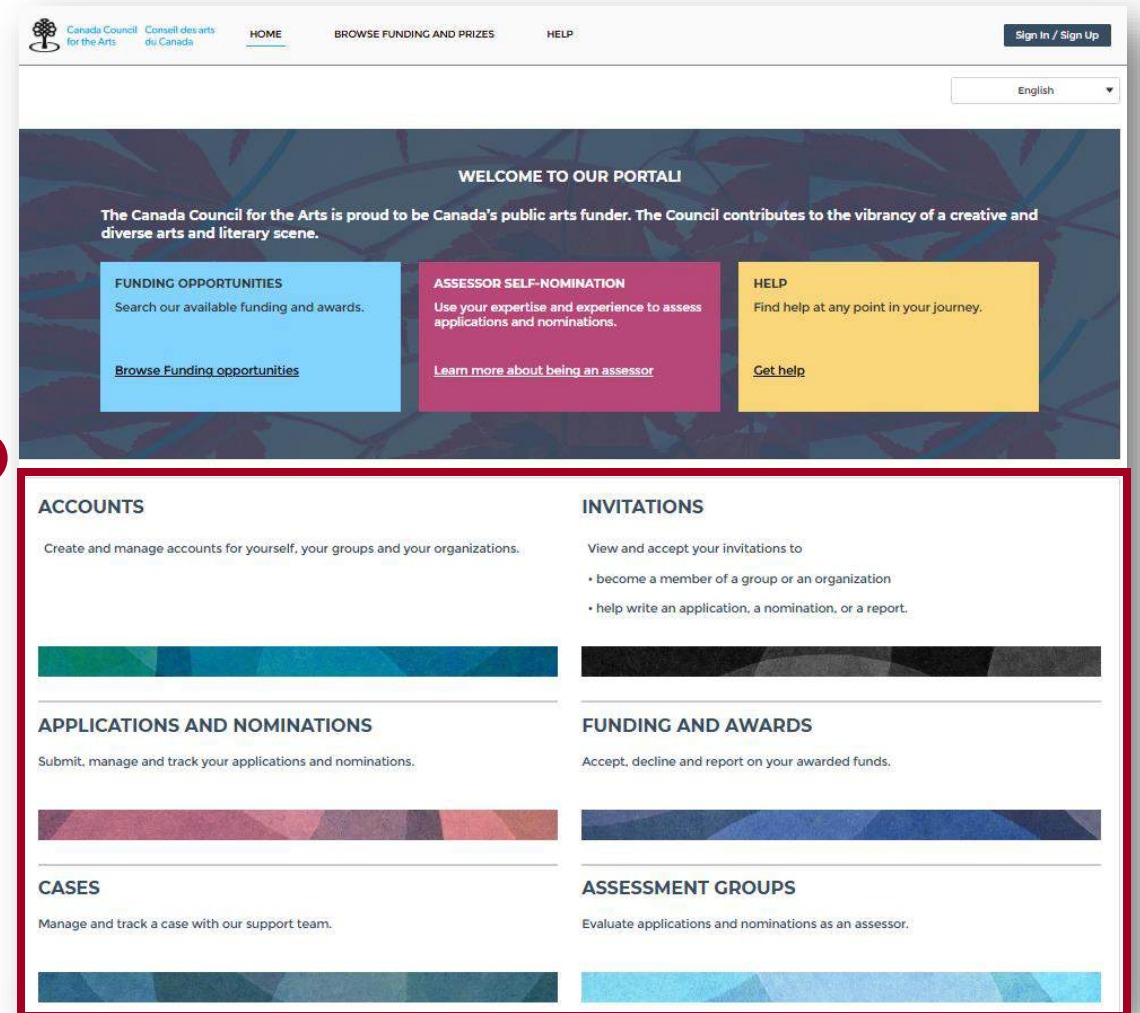
Browse Funding and Prizes

The **Browse Funding and Prizes** screen is your gateway to discovering a wide range of funding options available through our portal.

This page allows you to **browse and filter funding opportunities**, making it easier to find those that best align with your specific needs.

<u>Note:</u> As a guest user, you are able to browse funding opportunities, but you will be asked to create an account and sign in once you decide to initiate the application process.
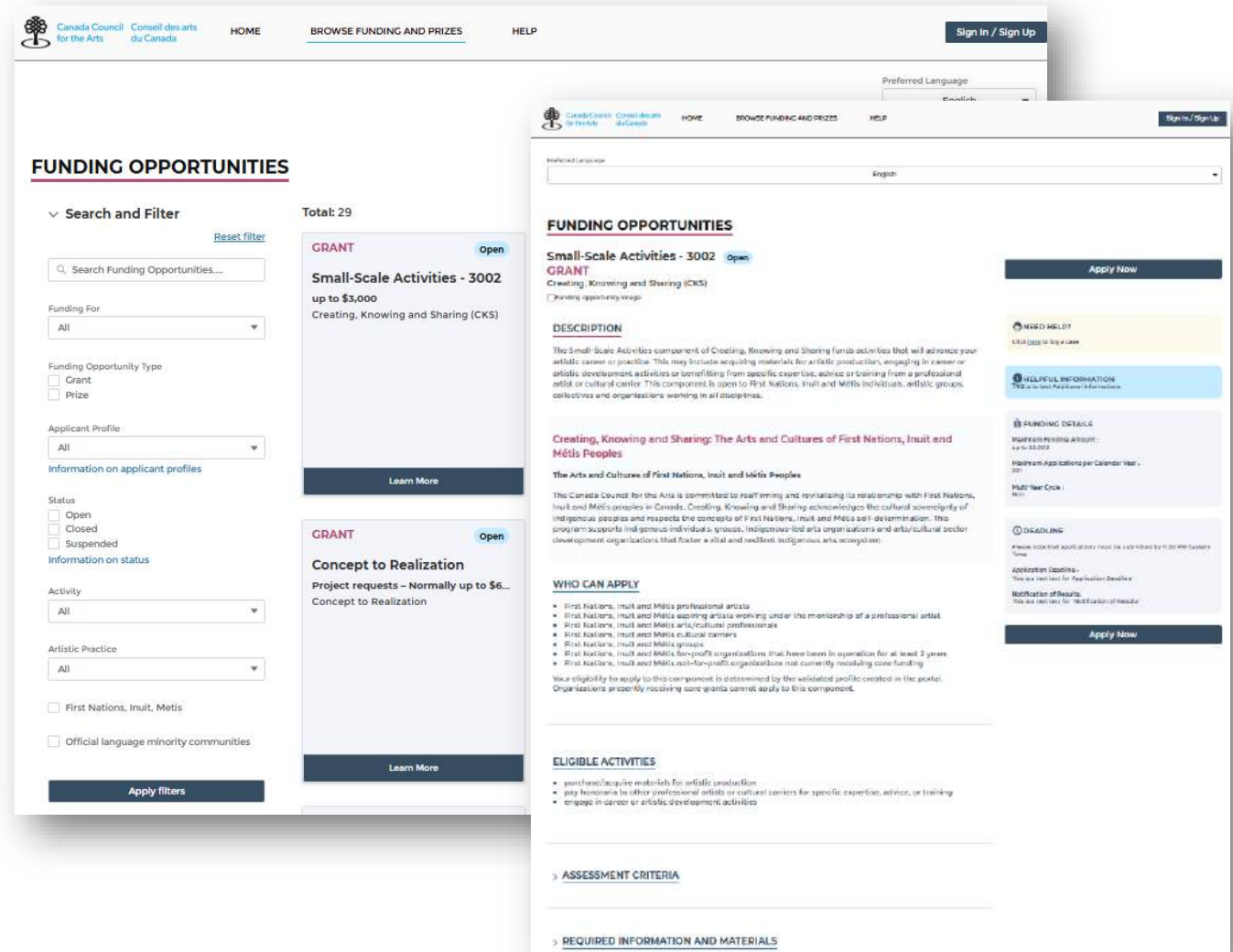
Help page

This page is your main resource for assistance and support.
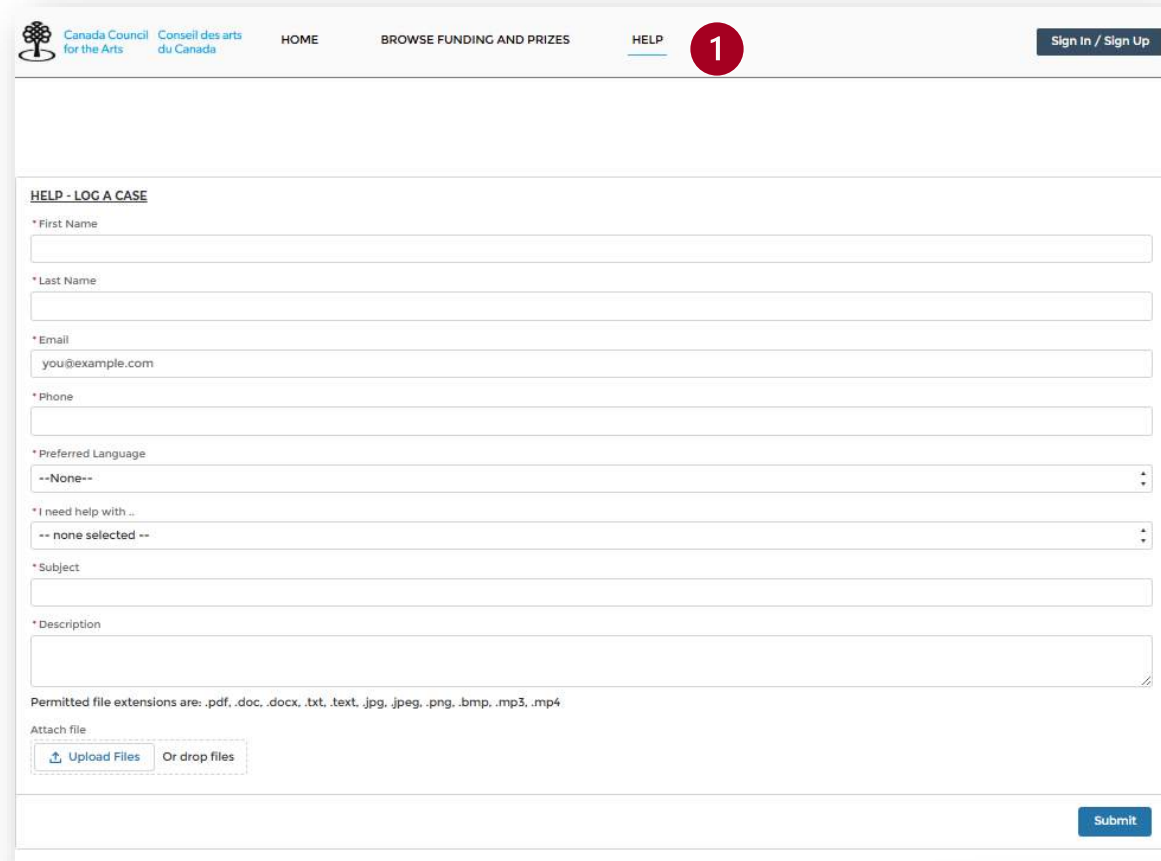
From here, you can:

- **Log a case** to request personalized help from the Canada Council

You can access the Help screen:

1. From the **top navigation menu**

2. From the **Need Help** box** found on several screens in the portal

Note: As a **guest user**, you can **log a case**, but you **won't be able to view your case history** in the portal. To see your case history, **create an account** and sign in.
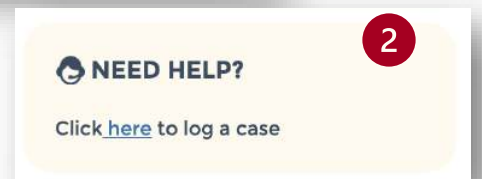
Create an account

By creating an account, you will be able to submit funding applications, manage your funding awards, update your account information, and manage your interactions with the Council.
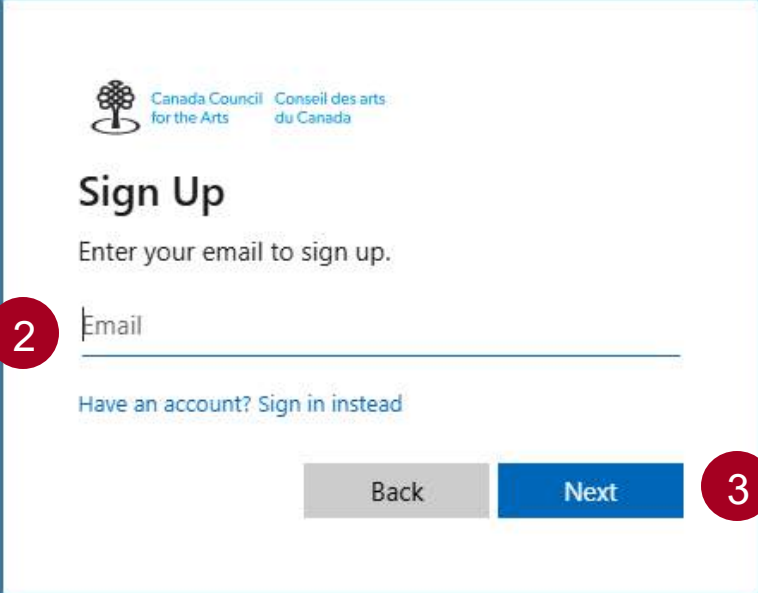
To create an account, click the **Sign In / Sign Up** button in the homepage header.
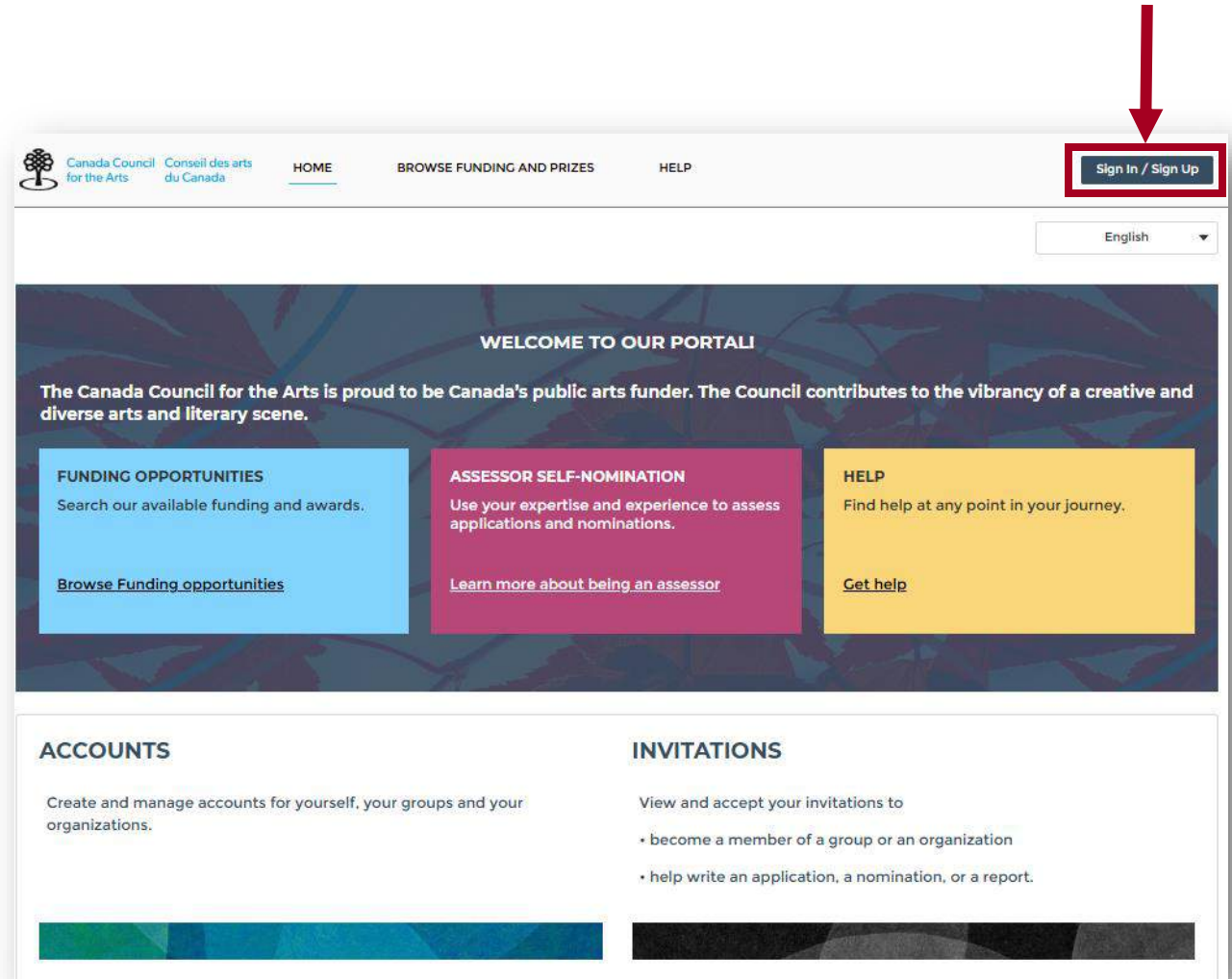
To sign up and create an account

On the **Sign Up** page:

2. Enter your **Email Address.**

3. Click on **Next**.
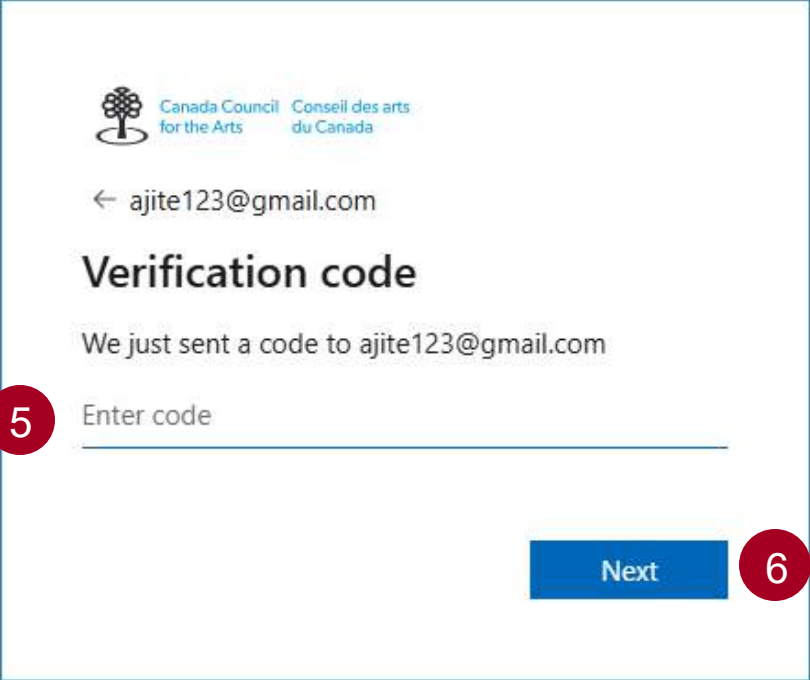
Sign Up

A verification code will be sent to your email.

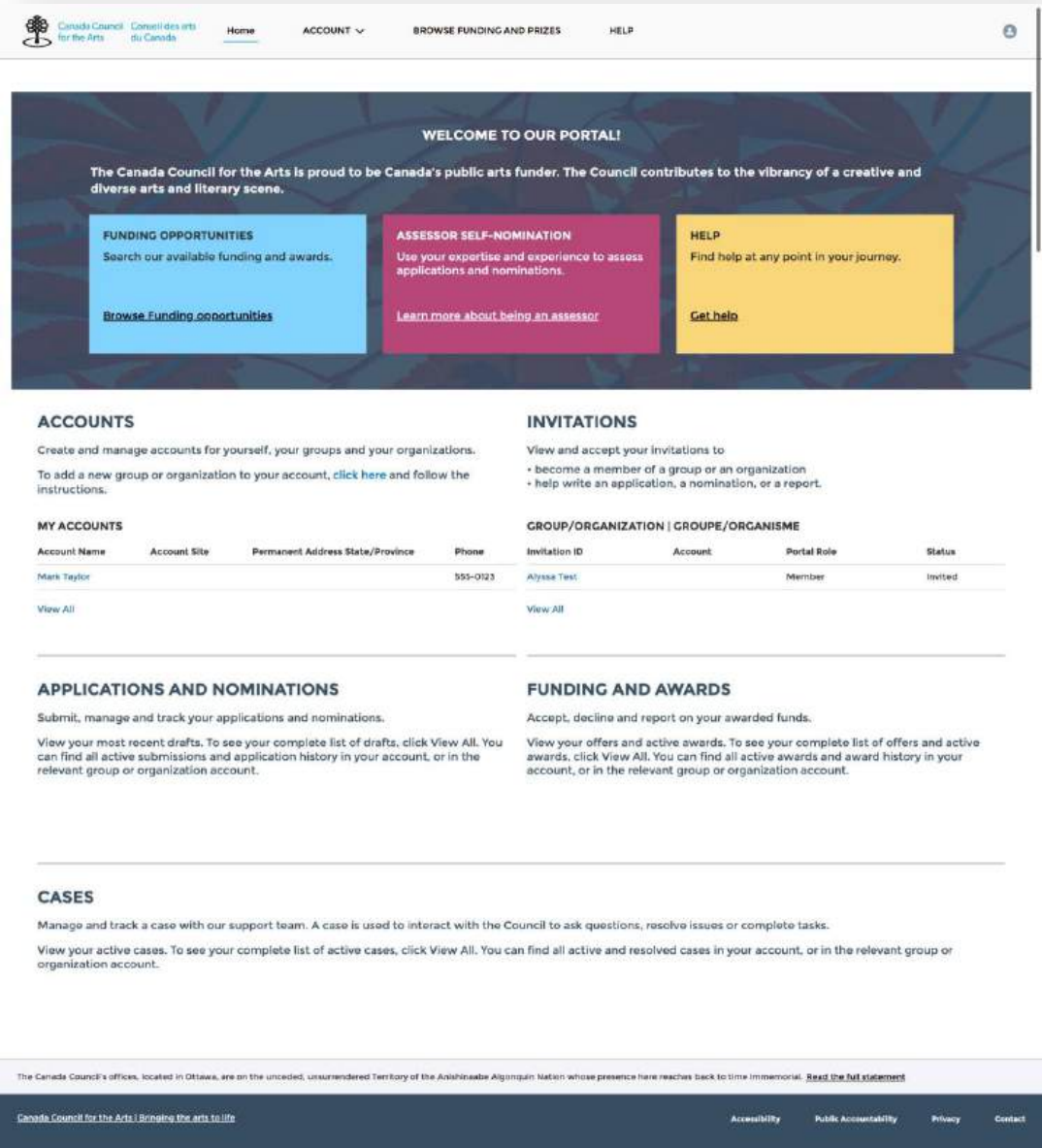4. Open your **email** to find the account verification code.

5. Go back to the **Sign Up** page and enter the **code**.

6. Click **Next**.

Sign Up

7. Enter your **first name** and **last name**. These will be used as your account name.
You can add other names (like an alias or legal name) later in your account.

8. Create a **password**, then type it again to confirm.

9. Click the **Terms of Use** link, read the terms and **check the box** to agree.

10. Click the **Privacy Policy** link, read the policy and **check the box** to agree.

11. Click **Next.**

Sign Up

Once you finish signing up, the system **signs you in automatically** and takes you to the **homepage**.

Remember the **email address** and **password** you used. You'll need them the next time you sign in to the portal.

2.2 As a signed in user

To sign in with an account

On the **Sign In** page:

1. Enter your **email address**.

2. Click **Next**.
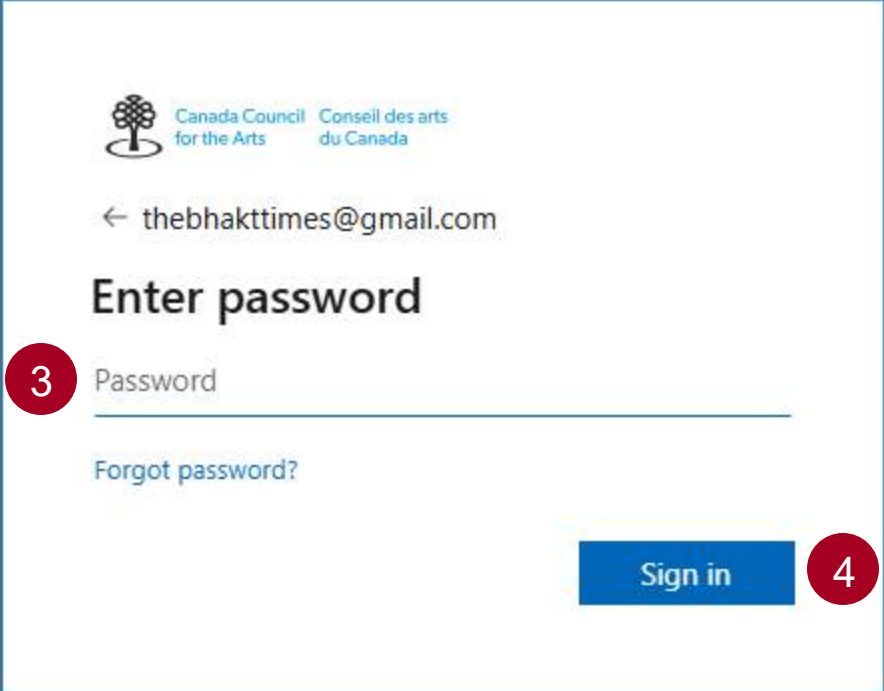
Sign In

3. Enter your **password**.

4. Click **Sign In**.

The system signs you in and takes you to the homepage.

Note: If you forgot your password, click **Forgot your password?** and follow the instructions on the screen to reset your password.
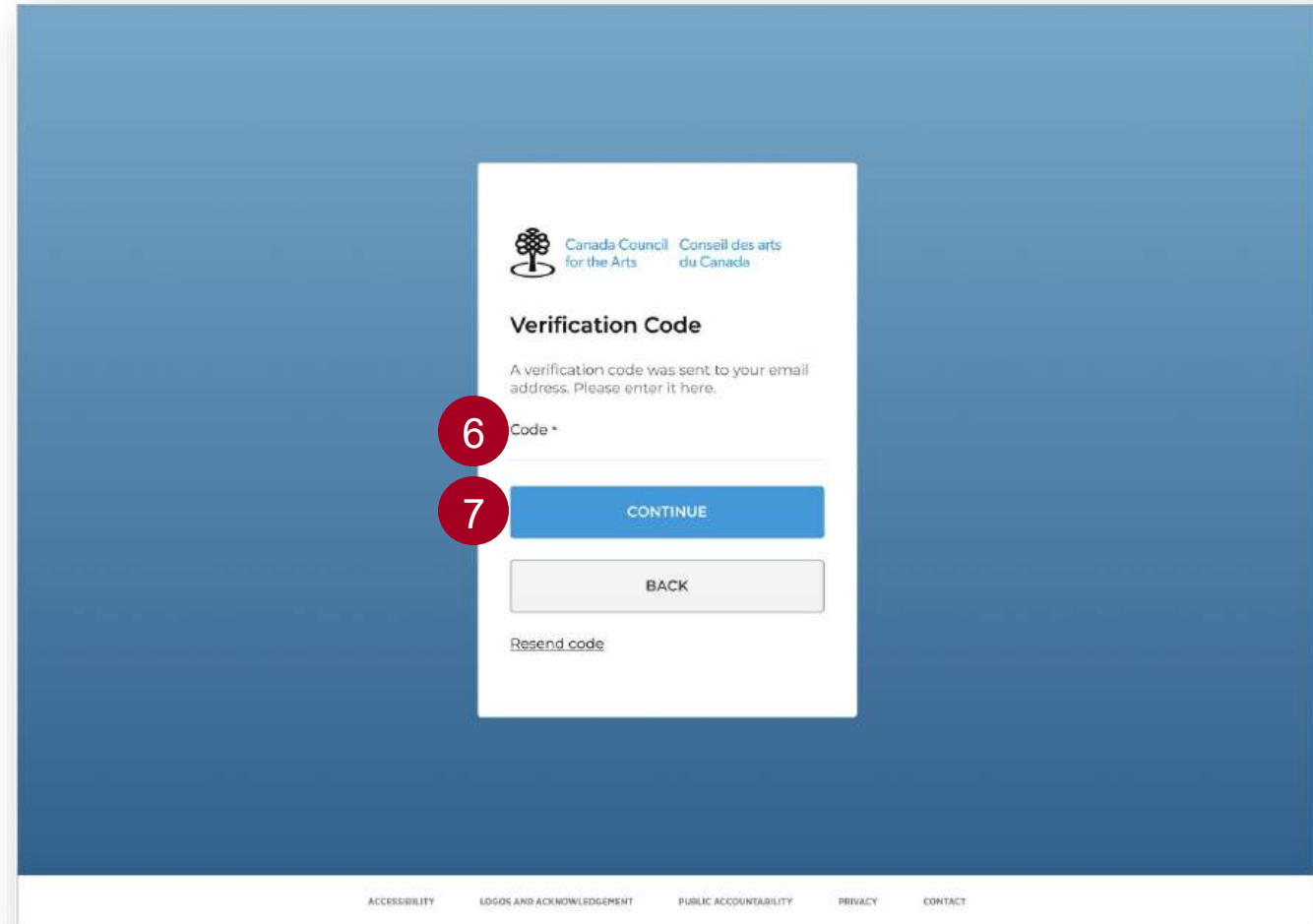
Sign In

A verification code will be sent to your email.

5. Open your **email** to find the account verification code.

6. Go back to the **Sign Up** page and enter the **code**.

7. Click **Continue**.

Sign In

The system **logs you in** and takes you to the **homepage**.

Navigating as a signed in user

The top navigation header of the portal provides quick and easy access to essential features. It includes several key items to help you navigate the portal efficiently:

- **Home** – Go back to the homepage

- **Account** – Manage your account details
  - Click **My Account** to view your personal account.
  - Click **My Groups / Organizations** to see your group or organization accounts

- **Browse Funding and Prizes** – Explore available funding opportunities

- **Assessment** – View your assessor assignments (only visible if you signed up to be an assessor)

- **Help** – Request support or assistance
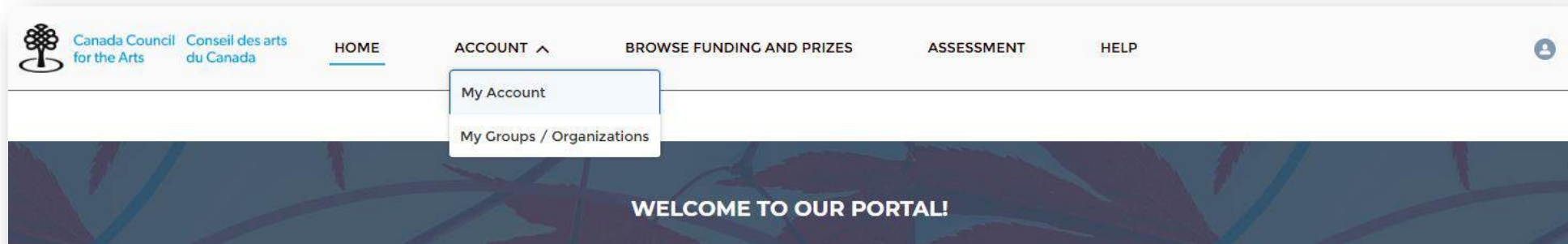
Navigating as a signed in user

The **User Menu** gives you quick access to your account and other important options:

- **My Account**

- **My Groups / Organizations**

- **My Cases** – View your case history

- **Sign Out** – Sign out of the portal
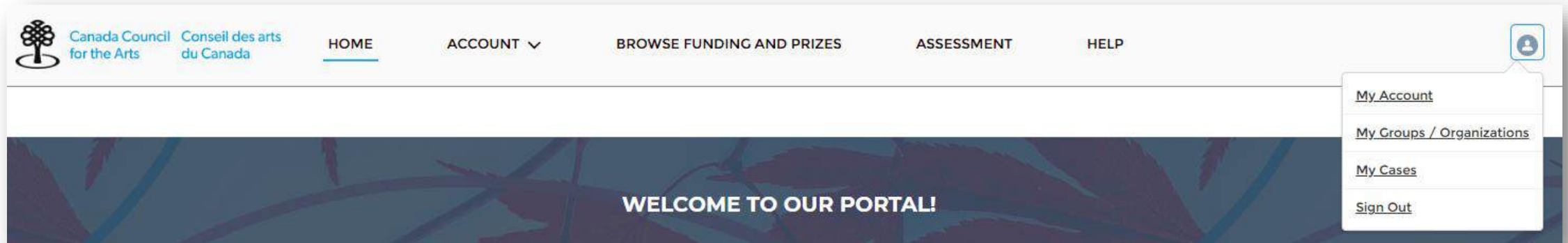
Homepage

As the landing page, the homepage is your central hub for accessing a wide range of tools and resources.

1. The **homepage** provides direct links to:
   - browsing funding opportunities
   - learning about being an assessor
   - getting help
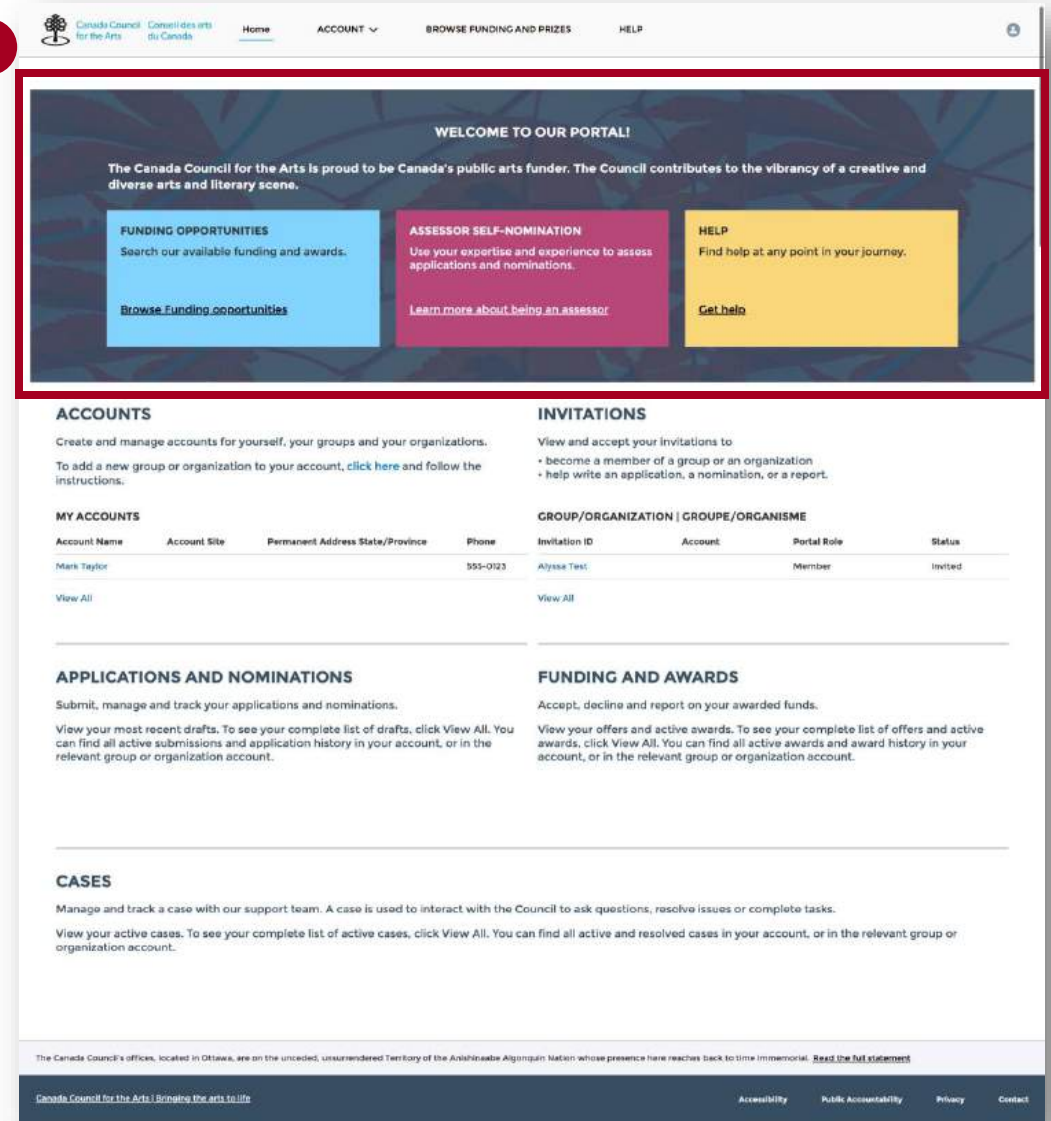
Homepage

2. The homepage also gives you a quick overview of what you can do on the portal. Each section shows a personalized dashboard:

- **Accounts** – View a list of your accounts

- **Invitations** – See invitations to join groups, organizations, or act as a third party

- **Applications and Nominations** – View your most recent draft applications

- **Funding and Awards** – See your funding offers and active awards

- **Cases** – View your active cases

- **Assessment Groups** – View your active assessment groups
  (Only visible if you self-nominated up to be an assessor)

Homepage

3. Each list on the homepage dashboard shows up to 5 records. To see the full list, click on **View All**.

Accounts: **My Account** page

This is your main hub for managing your account. It helps you to stay organized and keep your account up to date.

From there, you can:

- view and update your personal information

- see your groups and organizations

- track your applications, funding awards and cases

- create new groups or organizations

Accounts: **My Group** page

This is the main hub for managing your group's account.

From here, you can:

- **view and update your group's information**

- **track your group's applications, funding awards, and cases**

- **invite other portal users to join your group** (They can act on behalf of the group based on their permission level.)

It helps you keep your group's account up to date and organized.

Accounts: **My Organization** page

This is the main hub for managing your organization's account. It helps you keep your organization's account up to date and organized.

From there, you can:

- view and update your organization's information

- track your organization's applications, funding awards and cases

- invite other portal users to join your organization
  (They can act on behalf of the organization based on their permission level.)

Accounts: **My Groups/Organizations** page

This page is a dedicated space for managing your accounts. It helps you stay organized and manage everything in one place.

From there, you can:

- see a list of all your accounts (individual, group and organization)

- easily switch between accounts

- create new groups or organizations
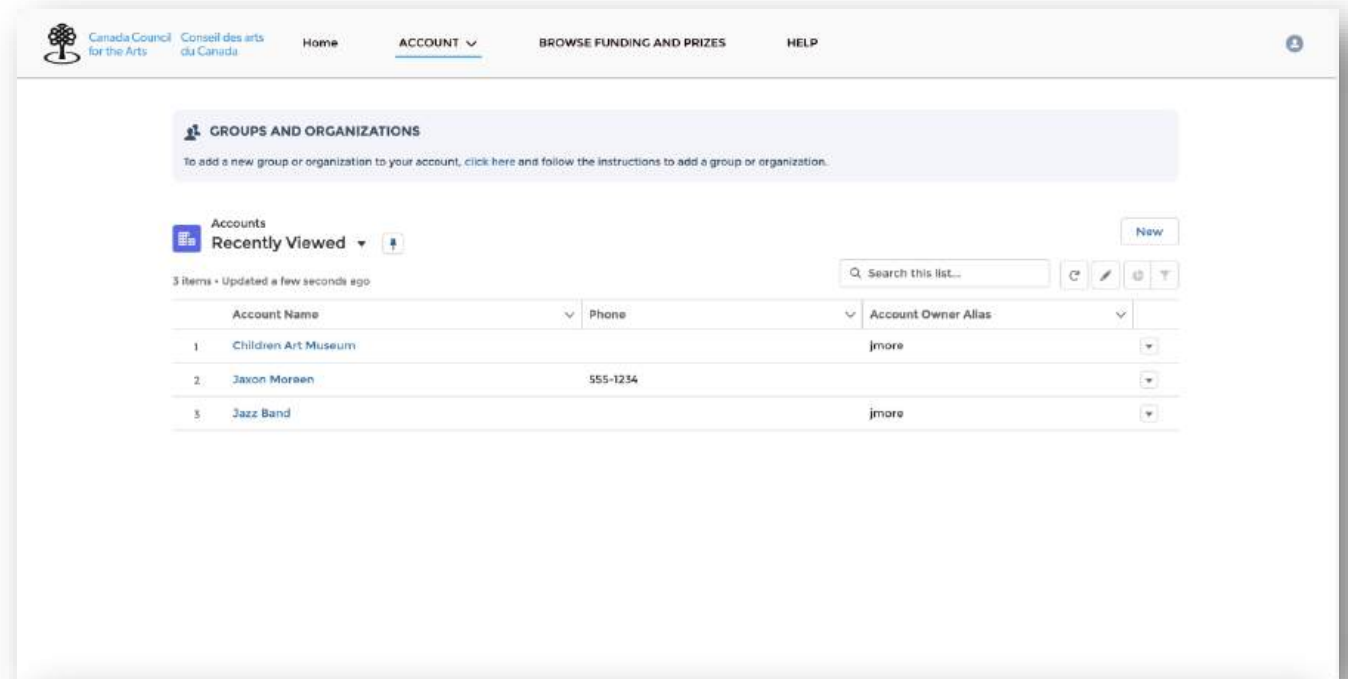
Browse Funding and Prizes **page**

This page is your starting point for exploring available funding opportunities. It's the easiest way to discover and apply for funding through the portal.

From there, you can:

- **browse and filter funding options** to find those that best match your needs

- **search for opportunities** that fit your projects and goals

- click **Apply Now** to start an application (only available when you're signed in)
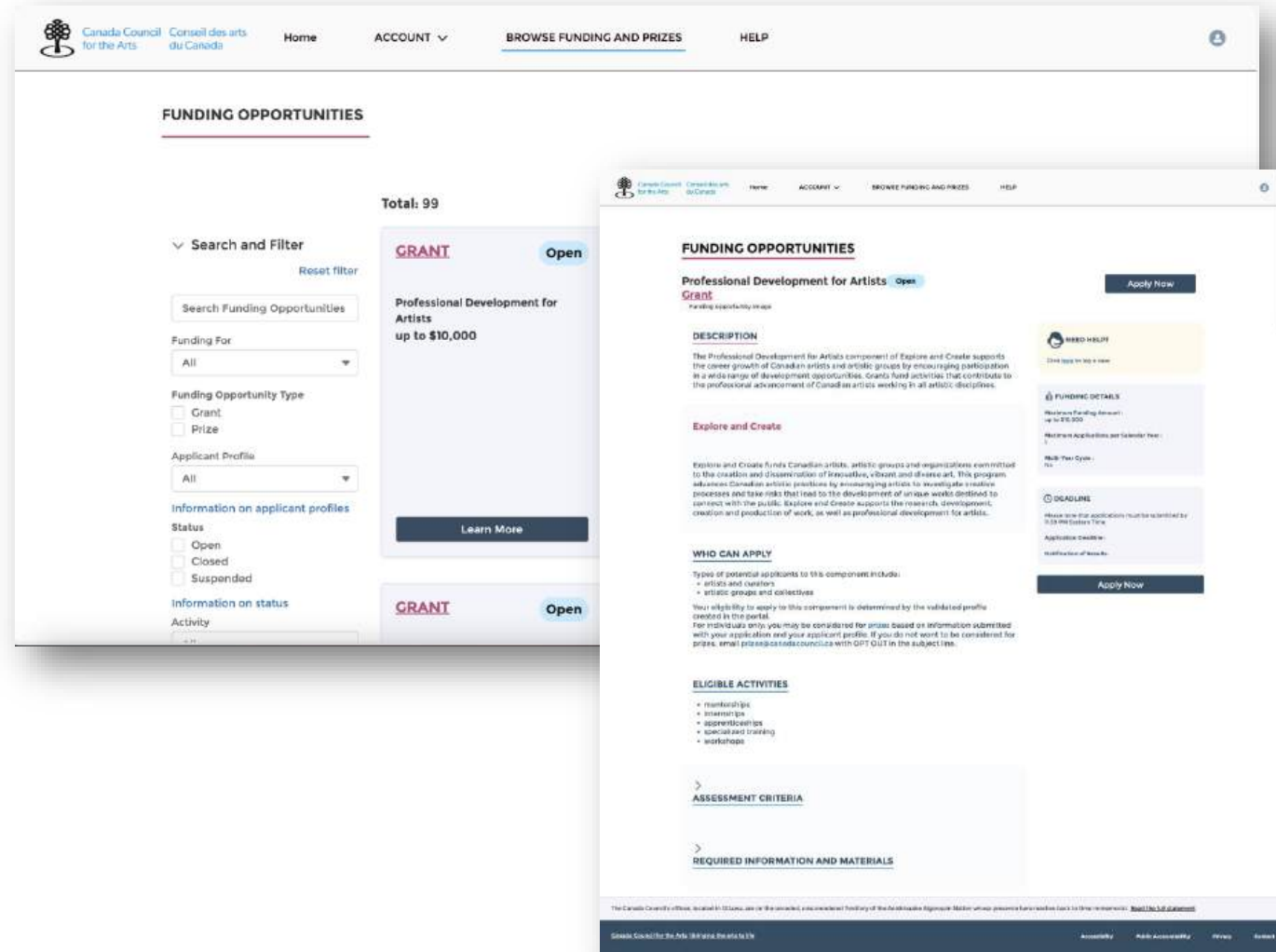
Assessment page

This page will be your main resource for managing your assessor assignments. You will only see this page if you have self-nominated as an assessor.

From there, you can:

- view a list of all assignments given to you

- access the applications you've been assigned to assess

- stay organized and track your workload

- complete your evaluations efficiently and on time

Note: This screen is only visible if you self-nominated to be an assessor.

Help page

This page is your main resource for assistance and support.

From there, you can:

- Log a case to request personalized help from the Canada Council

You can access the **Help** screen:

- From the top navigation menu

- From the **Need Help** box** found on several screens in the portal

Note: If you're signed in, you can view your logged cases from your **My Account**, **My Group** or **My Organization** screens, and see your full case history on the **My Cases** page.

My Cases page

The **My Cases** screen offers a detailed history of your past and current cases, allowing you to easily review and track the progress of your cases.

Additionally, the **My Cases** screen provides you with the capability to submit new cases, ensuring that you can address any issues or inquiries promptly.
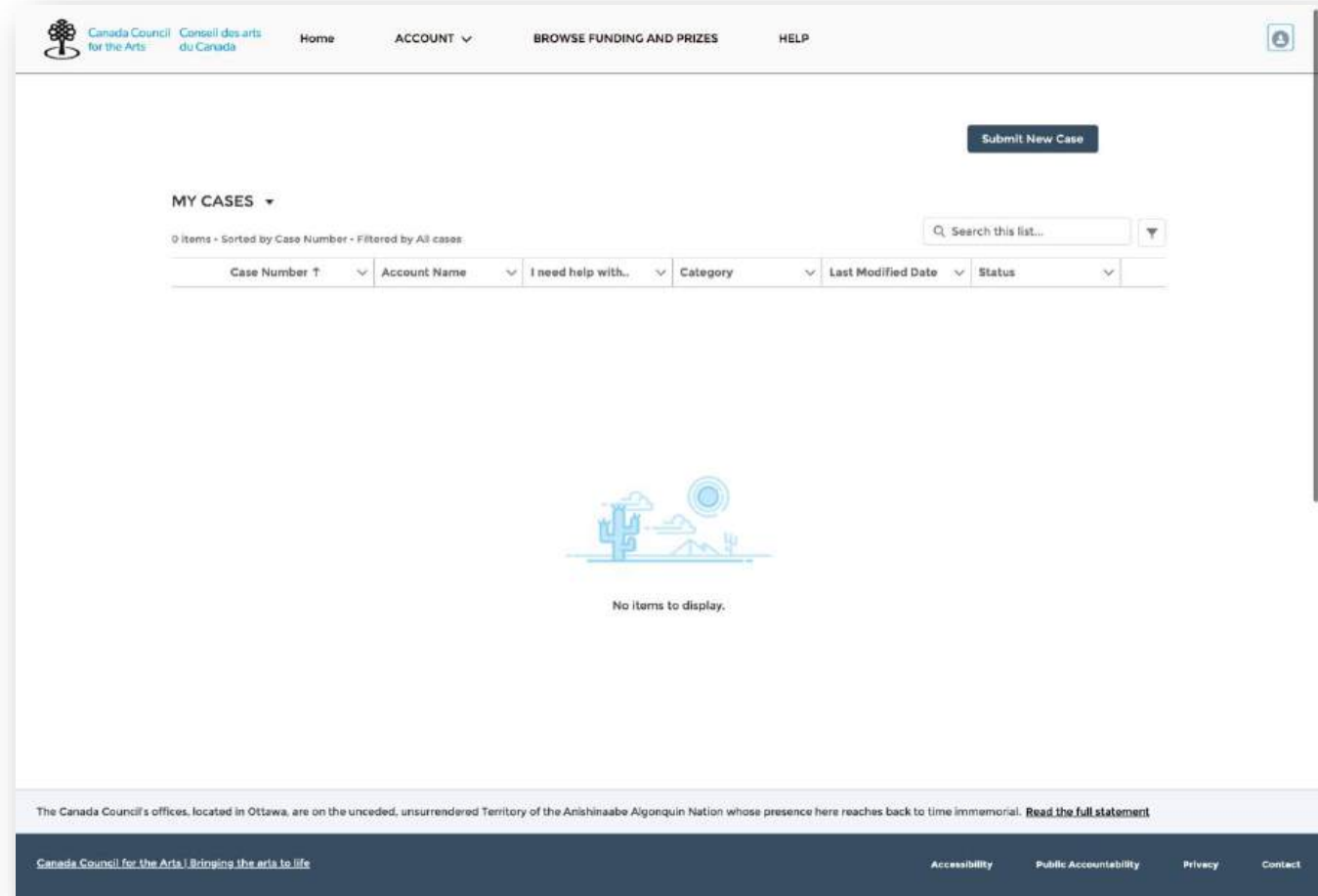
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Thank you!