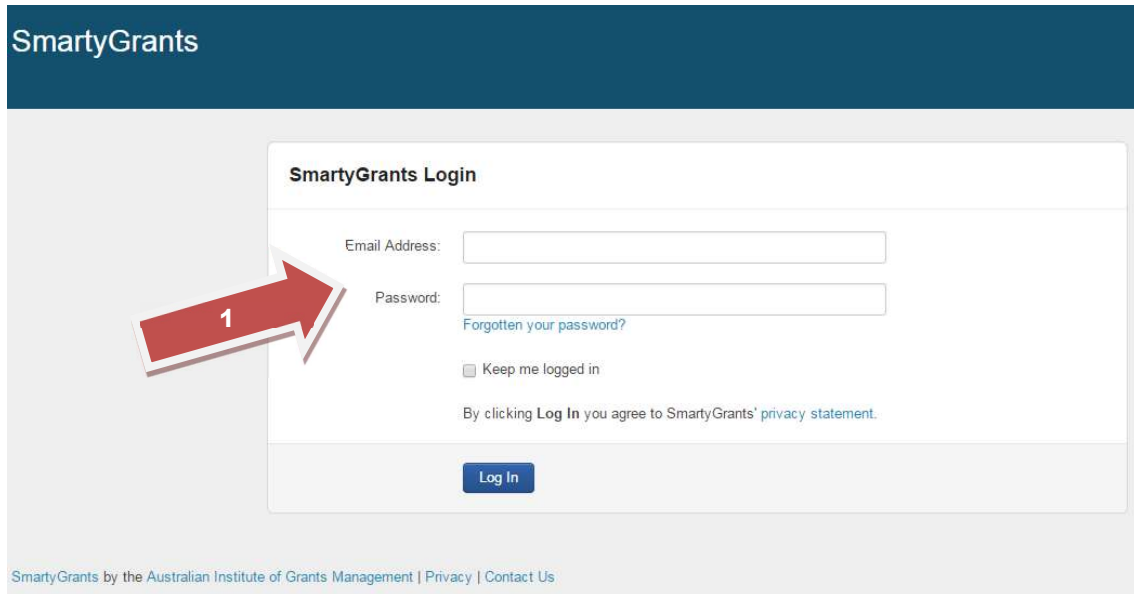


CBF SmartyGrants Assessor Account Preferences

This guide will help you set up your account to assess grants in the CBF's *SmartyGrants* portal. This will make navigating around the system a bit easier for you.

Step 1.

Go to <https://manage.smartygrants.com.au>, enter your email address and password and **Log In**. If you cannot log in please contact Grants Support Team (Volunteer Manager) on gerogei@cbf.org.au. Please do not use anybody else's log in details.



SmartyGrants

SmartyGrants Login

Email Address:

Password:

[Forgotten your password?](#)

Keep me logged in

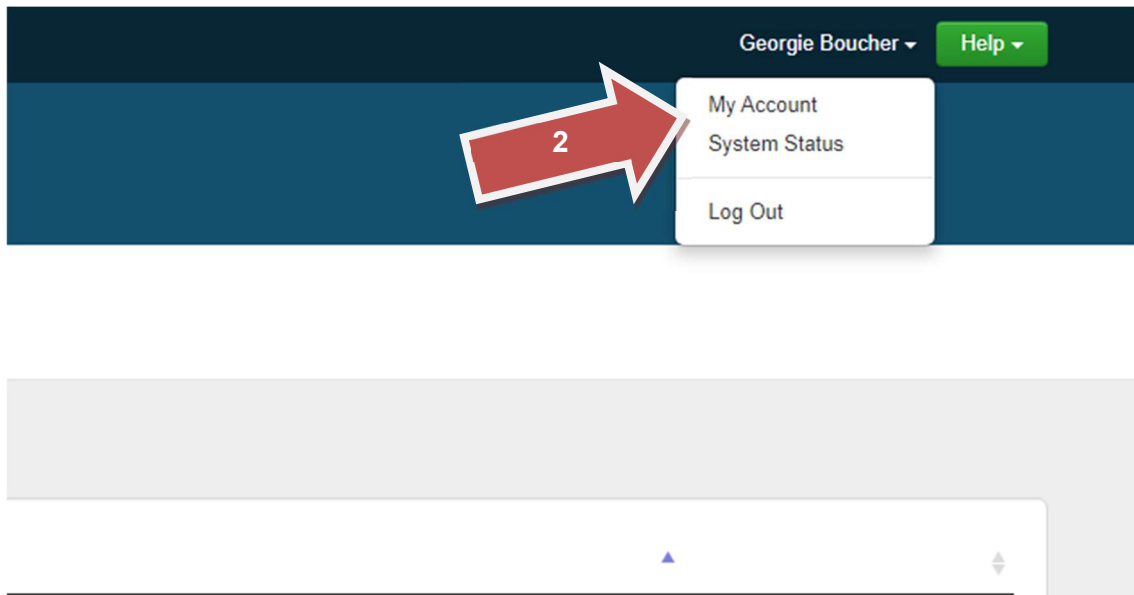
By clicking **Log In** you agree to SmartyGrants' [privacy statement](#).

Log In

SmartyGrants by the Australian Institute of Grants Management | [Privacy](#) | [Contact Us](#)

Step 2.

Once you are logged into the system, in the top right hand corner of the screen click your name and **My Account** to access these settings.



Georgie Boucher ▾ **Help** ▾

My Account

System Status

Log Out

Next page....

CBF SmartyGrants Assessor Account Preferences

Step 3.

Beside **Navigation Layout**, ensure only the **Top navigation bar** is ticked. This will mean the top, dark blue bar will always be visible to save you scrolling back to the top of an application to access the home page, your account settings, the Help Guide for Assessors and to Log Out.

The other options which aren't recommended will 'freeze' the middle (lighter blue) and lower (white) navigation bars, which take up greater screen space and aren't as relevant to assessors.

Step 4.

Once you have read and familiarised yourself with the grant guidelines on the first page of the first application that you assess, you can change your settings so that you don't have to scroll through the guidelines and other text instructions for applicants every time you read an application.

Beside **Viewing Form** change the setting to **Responses only**. If you wish to view the grant guidelines (and other text) again at any stage during your assessment, edit this setting again to **Full form** and refresh your page.

Step 5.

Beside **Default Application Tab View** ensure this setting is set to **Assessment** so that every grant record you open will take you automatically to the Assessment section.

My Account Settings

The screenshot shows the 'My Account Settings' page with the 'Preferences' section. Three red arrows with numbers 3, 4, and 5 point to the following settings:

- 3** points to the **Navigation Layout** section, which includes three checkboxes: Top navigation bar (navy) always visible when scrolling, Middle navigation bar (blue) always visible when scrolling, and Lower navigation bar (white) always visible when scrolling. Below these is the text: 'The new page layout will take effect after reloading the page or navigating to a new page.'
- 4** points to the **Viewing Form** section, which is set to **Responses only** (with an 'Edit' button) and includes the text: 'Only the responses to a question will be displayed, general content and instructional text will be hidden.'
- 5** points to the **Default Application Tab View** section, which is set to **Assessment** (with an 'Edit' button) and includes the text: 'The Assessment tab will display when first viewing an application.'