



eCivis

Funding Opportunity Tool

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Lesson 1: Account Access

Outline:

1. Welcome email links to Administration section
 - a. My Account
 - Change password
 - Enter contact information
 - Specify user profile
 - b. My Preferences
 - Display preferences
 - Email preferences
 - Save to home page
 - c. Future access
 - Bookmark and save password
 - https://gn.ecivis.com/GO/gn_home (direct)
 - www.ecivis.com (main website and link)

Lesson 2: System Overview, Home Page, Navigation

Outline:

1. Homepage
 - a. Tabs across the top
 - Limited for now – Research – Reports - Administration
 - b. Three main system components
 - RESEARCH: Identifying funding opportunities
 - TRACKING & REPORTING: Creating, defining, managing projects & grants (not accessible until full access)
 - INSIGHT: Links to helpful courses, publications, videos
2. Shortcuts
 - a. MY GRANT ACTIVITY
 - Failsafe for missed email notifications
 - Updates since last login
 1. Grants that you have saved
 2. Search Agents
 - b. Discover more with RECENTLY PUBLISHED box
 - Research activity input into system last 14 days
 - c. Grants news feed with FEDERAL GRANTS IN THE NEWS box
 - Pass-through links to articles
 - d. Recent articles from ECIVIS GRANTS BLOG

Lesson 3: Finding Funding Opportunities

Outline:

1. Method #1: Proactive searching (trial & error)
 - a. Simply search by KEYWORD as one method
 - Subject matter, CFDA, grant title, grant number, etc
 - Recommended keywords will auto-complete
 - b. Filtering with ADDITIONAL SEARCH CRITERIA
 - CATEGORIES – typical to government departments and projects
 - TYPE – Federal, Foundation, most states
 - GRANT AGENCY – to get specific
 - INCLUDE ARCHIVED GRANTS - Grants are archived if a newer version has been released (2019 vs. 2020 version), or if a grant has not been newly made after 3 years.
 - ELIGIBILITY – work with partners
 - DUE DATE – align with project, archived/historical
 - MATCHING – depending on your accounting/funds available
 - GEO_FILTER – filters Fed and Found grants based on your state
2. Search Results
 - a. Administration
 - Adjust number of listings per page in “My Preferences”
 - Change sorting by clicking column headings
 - b. SCORE – ranks best match to search terms
 - c. GN CODE – unique eCivis grant ID
 - d. GRANT TITLE – hover-over for details
 - e. AGENCY – funding agency, grantor
 - f. ACTUAL FUNDS – unspecified or amount
 - g. DUE DATE – provided by agency
 - Unknown – often more details in the notes in grant details page
 - Single date – once per year
 - Multiple – more than 1 per year
 - Rolling – ongoing throughout year
 - h. PREVIOUSLY FUNDED APPLICATION (PFA) ICON (adobe acrobat symbol)
 - Searchable library in Grant Research tab as well
 - i. NOFA ICON – 2nd icon
 - Full published version of notification
 - j. SAVE ICON –
3. Method #2 Saving Results and Setting up Search Alerts
 - a. Click “Create Search Agent” to save current search criteria
 - Name- descriptive, by subject matter
 - Check mark “Send Search Agent Alert Email”
 1. Receive automated email notifications
 2. New grants that match this criteria
 3. Refer to My Preferences to edit
 - b. Revisit an existing Search
 - Dropdown list to select name
 - Click “Run Search Agent”
 - Narrow and refine to a short list
 1. “Ignore Grant” Icon removes grant from view
 2. “Show Ignored Grants” icon returns to full list

- a. Managing Search Agents
 - Click “My Search Agents”
 - Also accessible from the “Grant Research” tab
 - Run a search agent to see current matching results (changes constantly)
 - Delete a search agent
 - Make edits to keywords or filters. System will ask to save changes

Lesson 4: Understanding Funding Opportunities

Outline:

1. Orientation
 - a. Paraphrased, summarized by eCivis team
 - b. Organized into tabs
2. A brief overview
 - a. Summary tab
 - b. Type, agency, office, CFDA number
 - c. Due date and type, solicitation date, match information
 - d. Summary of the available program
3. Who is eligible and how to apply?
 - a. Eligibility/Application tab
 - b. Eligibility notes, applicants, application notes
 - c. When, how to submit
 - d. What to include in application
 - e. Evaluation criteria
4. What are the financial details of this grant?
 - a. Financial tab
 - b. Match, type, funds, range, number of awards
 - c. Detailed match notes, funding notes
 - d. Projects supported and not supported
5. Who do I contact with questions? How do I get the application packet, NOFA, etc?
 - a. Contact/Files tab
 - b. Program office contact info and notes
 - c. Agency/program files to download
 - d. File notes
6. See history of grant updates (if applicable)
 - a. Updates tab
 - b. Date and update provided by the grantor
7. See Previously Funded Applications for this grant (if applicable)
 - a. PFA tab
 - b. Project(s), applicant, summary
 - c. Downloadable application
8. Improve search to find more grants like this
 - a. Keywords tab

- Keywords associated with grant
 - Links to create a new search
- b. Categories tab
 - Categories associated with grant
- c. Related Grants tab
 - Previous years' version & other parts of the grant
- 9. See who else has looked at this grant
 - a. Activity tab
 - Viewed by/Saved by
 - b. Click names to send email with any questions
 - c. Grant Usage button
 - My Saved Grants

Lesson 5: Distributing Funding Opportunities

Outline:

1. Routing via EMAIL GRANT button
 - a. Grants Network User
 - Select department, username
 - Check to create a "Review Task" and assign date
 - Add any notes to include in email
 - Included in RESEARCH ACTIVITY REPORT and GRANT REVIEW REPORT
 - b. Non Grants Network User
 - Enter any email address or pull from historical list
 - Add any notes to include in email