# GRANTEE PRE-AWARD

Training Package

Contents

Introduction

Welcome to eCivis! We look forward to working with you throughout your grants journey.

This training outline is divided into lessons. In each lesson you will find 4 sections:

Resources

- Link to Lesson Training Video (**requires you to simply enter your email address to view**)
- Link to the corresponding section of the User Guide

Outline

- Full lesson outline, breaking down each video

Takeaways

- Key takeaways from each lesson, so you can stay on track

Activities

- Recommended Activities following each video to become proficient in the system

Looking for support? Within the application there is support button to the right of the homepage:
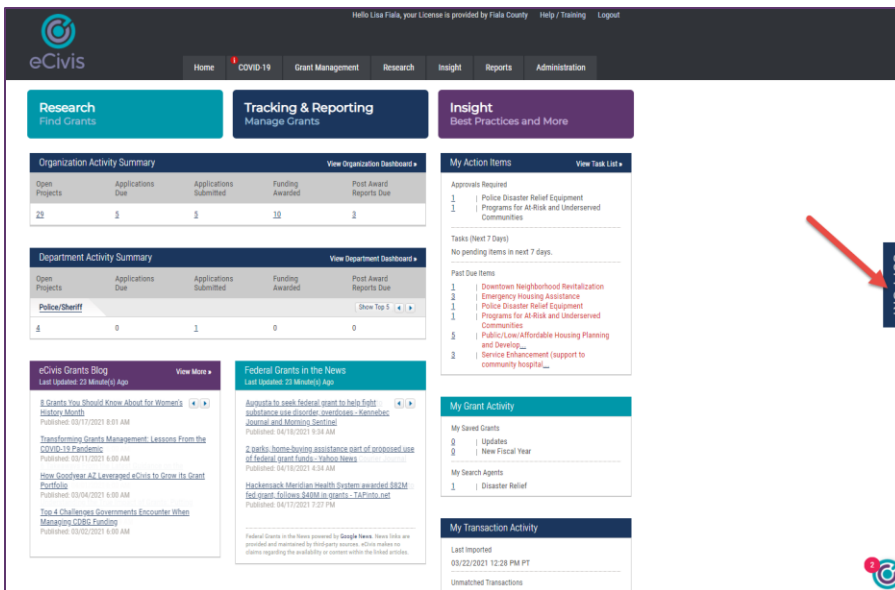
Important Note - Our logo and colors may currently differ from what is reflected in the videos below. We are in the process up updating all training guides to reflect our new branding

Lesson 1: Account Access

Lesson 1 Resources:
- [Lesson 1 Training Video (6:20) Link](#)
- [User Guide with Screen Shots Link](#)

Lesson 1 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 1 Key Takeaways:
- Know how to change password and contact information
- Understand how to change/update user profile and preferences
- Bookmark GN Website for easy access

Lesson 1 Recommended Activities
- Review user profile and confirm contact information
- Confirm settings in "My Preferences"
- Bookmark website for easy access

Lesson 2: System Overview, Home Page, Navigation

Lesson 2 Resources:
- [Lesson 2 Training Video (8:15) Link](#)
- [User Guide with Screen Shots Link](#)

Lesson 2 Outline:
1. Organizational Hierarchy » Organization » Department » Project » Grant
2. User Experience/interface- System Structure
   a. Tabs across the top
      - Navigate to any and all system features
   b. Three main system components
      - RESEARCH: Identifying funding opportunities
      - TRACKING & REPORTING: Creating, defining, managing projects & grants
      - INSIGHT: Links to helpful courses, publications, videos
3. Home page- dashboards, shortcuts, notices
   a. Dashboards for open & current grant activity
      - Organization Project Dashboard
        1. Limited to organization-wide administrative users (OMAH)
        2. Hyperlinked data points to quick reports
        3. "View Organization Dashboard" for more detailed summary & departmental breakdown
      - Department Project Dashboard
        1. Intended for departmental administrative users (DMAH)
        2. Hyperlinked data points to quick reports
        3. "View Department Dashboard" for more detailed summary & project breakdown
   b. Personal MY ACTION ITEMS widget
      - Upcoming & past due tasks
      - Failsafe for missed email notifications
   c. Personalized research assistance widget: MY GRANT ACTIVITY
      - Failsafe for missed email notifications
      - Updates since last login
        1. Grants that you have saved
           a. Updates, or if re-solicited
           b. Refer to My Preferences to edit
        2. Search Agents
           a. Saved search criteria
           b. Any new grants that match since last login

      c. Refer to My Preferences to edit

  d. MY TRANSACTION ACTIVITY
- Last imported – tells you the last time *new* expenditure data was added
- Unmatched transactions – tells you if imported expenditures did not find a grant or project match in the system (can click number to resolve those matches)

  e. Discover more with RECENTLY PUBLISHED box
- Research activity input into system last 14 days

  f. Grants news feed with FEDERAL GRANTS IN THE NEWS box
- Pass-through links to articles

  g. Recent articles from ECIVIS GRANTS BLOG
- Links to eCivis blog articles
- Can also subscribe

Lesson 2 Key Takeaways:
- Understanding organizational structure and hierarchy
- Understand how to navigate the application, the home page layout and key features

Lesson 2 Recommended Activities
- Create relevant projects and add project team members
- Create goals for each project

Lesson 3: Create and Define a Project, and Create Grant Tags

Lesson 3 Resources:
- [Lesson 3 Training Video (7:53) Link](#)
- [User Guide with Screen Shots Link](#)

Lesson 3 Outline:
1. Unfunded or underfunded program or community need
   a. System to manage the funding stream(s) for these PROJECTS
      - Grant lifecycle starts with a purpose of seeking funding
      - Define your need/project
      - Establish project goals, objectives and desired outcomes
2. Create your Project
   a. My Projects page
      - Alphabetic list of all open projects in which you are lead or team member
      - View or search to avoid redundancy, duplication
      - CREATE PROJECT
   b. Design details of project department, name, summary, etc.
3. Define Project Goals
   a. Click goals & metrics tab
   b. Green "plus" icon to add Project Goal
   c. Select between goal, objective, outcome, priority, and other
   d. Add goal title and description
4. Assemble PROJECT TEAM
   a. Green "plus" icon to add
   b. Pencil to edit, set preferences as well as add
      - Set permissions, grant status email alerts
5. No "Active Grants" so next step is to do RESEARCH
   a. Click on the Magnifying glass <or>
   b. GRANT RESEARCH tab at top
6. Create Grant Tags
   a. Allow you to organize grants based on grant criteria (eg: EPA-based grants, Awarded funds *over* $250,000, Law Enforcement-based, etc.)

Lesson 3 Key Takeaways:
- Know how to create a project workspace to manage your grants within
- Understand how to edit project details like project team and project goals
- Learn basic Grant Tag functionality

Lesson 3 Recommended Activities:
- Create relevant projects and add project team members
- Create goals for each project
- Create Grant Tags for future use

Lesson 4: Finding Funding Opportunities

Lesson 4 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
        - Fewer words recommended
        - Sometimes advanced syntax (ellipses, asterisks, commas) and Boolean search functions (AND, OR, NOT) are necessary
        - eCivis Help button
    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 available 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"
        - Adjust font size, print page, or link to previous page in page header
        - 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
        - Quick access, or from within Grant Details page
        - Full published version of notification

   j. SAVE/ASSIGN ICON –
- Quick access, or from within Grant Details page

3. Method #2 Saving Results and Setting up Search Alerts
 a. Two types of Search Agents recommended
- Project specific: current and future
- Department-specific, broad sweeping

 b. 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

 c. 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

 d. 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
- Toggle on and off "alert emails"
- Make edits to keywords or filters. System will ask to save changes

Lesson 4 Key Takeaways:
- Learn how to manually search Funding Opportunities
- Understand the information available in search results
- Know how to set up and manage Search Agents to automate searching for grants

Lesson 4 Recommended Activities:
- Search Funding Opportunities and save to at least one project
- Set up at least one search agent for future use

Lesson 5: Understanding Funding Opportunities

Lesson 5 Resources:
- [Lesson 5 Training Video (6:18) Link](#)
- [User Guide with Screenshots Link](#)

Lesson 5 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
      • All projects this grant is assigned to
      • Grant award funds Allocated to sub-projects

Lesson 5 Key Takeaways:
- Understand what funding opportunities look like in Grants Network
- Know where to find details about each grant including who has saved/viewed them

Lesson 5 Recommended Activities:
- View at least 5 new grants
- Spend time looking at each piece of the grant activity, including who has viewed

Lesson 6: Distributing Funding Opportunities

Lesson 6 Resources:
- [Lesson 6 Training Video (6:40)](#)
- [User Guide with Screenshots Link](#)

Lesson 6 Outline:
1. Routing via EMAIL GRANT button
   a. Grants Network User
      - Select department, user name
      - 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
2. Assign grant to project for tracking
   a. Click Save/Assign
   b. Assign grant to an existing project
      - Competitive or non-competitive?
      - Select grant stage
         1. More information requested the later the stage
         2. Add any relevant Tags for workflow and reporting purposes
   c. Assign grant to a new project if not made yet
3. Save grant to be alerted of "new fiscal year"
   a. Click Save/Assign
   b. Save as unassigned to add it to My Saved Grants list only

Key Takeaways:
- Understand how to save and assign grants
- Know how to share grants with both internal and external users

Recommended Activities:
- Save and assign a new grant to an existing project
- Save and assign a new grant to a new project you make
- Add grant tags to the grants you save
- Share a grant with someone in the eCivis network
- Share a grant with someone outside of the eCivis network

Lesson 7: Organization Funding - the alternative source of funding –

Lesson 7 Resources:
- [Lesson 7 Training Video (7:04)](#)
- [User Guide with Screenshots Link](#)

Lesson 7 Outline:
1. To add funding not listed in the Research database
2. Hover on the Grant Research tab, click ORGANIZATION FUNDING
3. Create new Organization Fund
    a. Click the Add Org Funding button
    b. Select either Competitive or Non-Competitive Funding
        - Fill in at least required fields as noted by asterisk
        - Add a summary – required
        - Check mark applicable categories – one required
        - Check mark who is eligible to apply – one required
        - Optionally add a URL and any files for download
4. To duplicate a previous Organization Fund
    a. Check for previously created version of that fund
        - Search bar
    b. Click Duplicate grant
    c. Edit only the changed data
5. Assign grant to project for tracking
    a. Click Save/Assign
    b. Assign grant to an existing project
        - Competitive or non-competitive?
        - Same functionality as with grant file
6. Manage created grant
    a. Edit Grant Information icon
        - Reopens file to edit details entered when created
    b. Delete Grant icon
        - Deletes the grant entirely
    c. Archive Grant icon
        - Moves it to lower section of area for managing larger volumes

Lesson 7 Key Takeaways:
- Understand how to add niche funding or grants that may not be in the eCivis system
- Know how to find and save Organizational Funding to projects
- Know how to edit/delete Organizational Funding

Lesson 7 Recommended Activities
- Add one Organizational Funding opportunity
- Save the above funding to one project you have created

Lesson 8: Manage Grants and Projects, Intro to Tasks

Lesson 8 Resources:
- [Lesson 8 Training Video (13:35)](#)
- [User Guide with Screenshots Link](#)

Lesson 8 Outline:
1. Locating Your Grant and Project Data
   a. If you know the grant detail page:
      - Use the Grant Usage button
   b. If you know the project title:
      - My Projects, on the Grant Management tab <or>
      - Project Search Tool, on the Grant Management tab
   c. If you know the department:
      - Homepage Dashboard links
   d. If you have an email alert regarding the project/grant
      - Alert emails linking to the project
2. Workspace to manage your grants/projects
   a. In the eCivis platform is known as the "Project Dashboard"
      - Control all variables in grants management, monitor best practices
        1. Control deadlines/alerts, collaborate, create paper trail, store documents
        2. Track both the programmatic and fiscal compliance of a grant/project
   b. Orientation to Project Dashboard
      - Buttons
        1. Data Integration Options (if applicable)
        2. Project Options
      - Tabs
        1. Overview
           a. Active grants assigned to project
           b. Project Team members
              o Add/remove/preference/notifications
        2. Documents
           a. Files stored by grant and stage
        3. Grant Lifecycle
           a. Stage chances, ability to edit
        4. Goals & Metrics
           a. Establish, track, monitor
        5. Budgets
           a. Develop budgets, track spending
        6. Contracts & Accounts
           a. Award details, revenue & expense account lists
        7. Spending
           a. Aggregate spending reports to track draw downs
           b. Alternatively, track invoicing and reimbursements

8. History
    a. History of project and associated grants
- Designated for approvals
- Tasks area, pending, complete, history

3. Two methods to progress a grant, activity or milestone
    a. First: Task Management
        - Watch for workflow tasks or custom tasks to be completed
        - Required tasks block grant stage
    b. Second: Available Action Items
        - Select the appropriate next action item
        - Primary method of advancing grants stage
            1. Competitive/Non-competitive routes
            2. Full grant lifecycle from Under Consideration to Close Out
4. Create Template Tasks based on Grant Tags
    a. Automate task creation based on Grant Tags
    b. Simplify review process when grant awarded funds are over $250,000 (for example)

Lesson 8 Key Takeaways:
- Know how to locate saved grants and projects
- Understand the Project Dashboard and know what information you can access
- Initial introduction to moving through the grant lifecycle and task management

Lesson 8 Recommended Activities:
- Practice searching for any saved grants or projects
- Look through a project dashboard and become familiar with how information is organized

Lesson 9: Task Creation

Lesson 9 Outline
1. Tasks Overview
   a. 3 Types of Tasks (Simple, Advanced, and Automatically-Applied)
      - Set Review Task
        1. In Grant, click "Email Grant"
        2. Fill out grant review request, and assign to user with due date.
      - Simple Tasks
        1. Good for one-off reminders like Setting Grant Goals
        2. Go to Project, click "Add Task," and follow steps
      - Advanced Tasks
        1. Good for repeated tasks
        2. Example: Update Grant Goal Progress
        3. Take you through a wizard to ensure they are set up correctly.
      - Automatically-Applied Tasks
        1. These are built in your account based on the worksheet you provided when your account was setup
        2. They apply automatically when actions are performed in your account, such as a Grant is Saved/Assigned
        3. Show demo of Application Approval

Lesson 9 Key Takeaways:
- Understand how to create simple, recurring and template tasks

Lesson 9 Recommended Activities:
- Take time building all three types of tasks (simple, recurring and template) and deploy them to your grants

Lesson 10: Application Process

Lesson 10 Resources:
- [Lesson 10 Training Video (2:52)](#)
- [User Guide with Screenshots Link](#)

Lesson 10 Outline:
1. Two paths for Applying to a Grant (2 Radio Buttons)
   a. I will not apply for this grant
      - Moves grant into project history tab
         a. Notes field
         b. Upload supporting documents
   b. I will apply for this grant
      - Be prepared to enter the following:
         a. Application Due Date, Reminder, Assigned to, Projected Award, Match Requirements, Optional fields
         b. Upload supporting documents
         c. Moves grant to Application Preparation stage

Lesson 10 Key Takeaways:
- Learn the options to move a grant out of the "Under Consideration" stage
- Understand how to update the status of a grant – either "I will apply" or "I will not apply"
- Know how to enter relevant grant information for those grants you choose to apply for

Lesson 10 Recommended Activities:
- Go through the process of entering one grant into the "I will apply" stage, uploading relevant documentation

Lesson 11: Budget Construction in Application Preparation Phase

Lesson 11 Outline

1. What steps to prepare application, proposal (I will apply to grant)
   a. Put into "Application Preparation" stage
   b. Common tasks
      - Budget narrative (will be discussed later)
      - System generates "Application Due" Task at this stage
   c. Available Actions to prepare, define, and submit your grant
      - I would like to access details of this grant (radio button)
      - I would like to create/manage goals this grant
        1. Opens the Goals & Metrics tab
           a. Add <u>Grant</u> Goal, objectives, outcomes, priorities, other
           b. Example: If the project is constructing a building, the grant could be for architectural services
      - I would like to create/manage a budget for this grant
        1. Create budget page for a grant
           a. Choose appropriate SF-424 compliant template
           b. NOTE: Some users will have a *custom template* we built here. If you don't, let us know, and we can build one based on your budget line items.
           c. Choose single or multi-term
        2. Indirect Cost settings
           a. NOTE: If you have Individual GL Code lines for each indirect cost, this should be left as "N/A."
           b. De Minimis Rate
           c. Negotiated Rate
           d. Itemized
           e. Not applicable (N/A)
        3. Match/Cost-Share Settings
           a. Percentage
           b. Itemized
           c. Total Amount
           d. Not applicable (N/A)
        4. Budget Stage is set
           a. Pre-Award
        5. Create Table--in one of the Federal categories
           a. NOTE: If they have Custom Budget template, these tables will already be built.
           b. Open button to expand budget category details
           c. To add a custom sub-category
              o Settings icon and "Add Subcategory"

    d. Either way, settings icon and Add table to create line items
      o Enter budget line item details
      o Grant Ledger code, if known
      o Notate Indirect cost/Cost share if applicable
      o Repeat as necessary
    e. Uniform Guidance Help
      o Opens Insight tool to search 2 CFR 200

6. Budget Narrative
  a. Open button to expand Budget Narrative details
  b. Collaborate with team members
  c. Export to PDF to print

7. Budget Documents
  a. Open button to expand Budget Documents details
  b. Click Green "plus" icon to upload files

8. Track Revisions

- I am ready to submit my application
  1. Moves grant to Application Submitted stage
    a. Application Submitted Date, Completed by, Projected Award, Match Requirements, Optional fields
    b. Upload required supporting documents
  2. Final step of pre-award grant stages

Lesson 11 Key Takeaways:

- Learn common activities which occur in the "Application Preparation" stage
- Understand how to add basic grant goals
- Know how to build a grant budget and add relevant documents
- Understand how to progress a grant to the "Application Submitted" stage

Lesson 11 Recommended Activities:

- Using a grant in the "Application Preparation" stage add a grant goal
- Using a grant in the "Application Preparation" build a grant budget
- If possible, move one grant to "Application Submitted" stage

Lesson 12: Pre-Award Reports

Lesson 12: Outline
1. Standard reports on historical grant activity (e.g. how many applications submitted?)
   a. Hover over Activity Reports
      - Click Apps Submitted
         1. Choose a date range and department
2. Create your own reports (e.g. All grant opportunities not yet awarded)
   a. Click Report Builder
      - Select department(s), grant type(s), grant stage(s)
         1. (e.g. All departments, All grant types, Stages: Under Consideration, Application Preparation, and Application Submitted)
      - Add as many data points from four data collections
         1. (e.g. Grant Title, Current Stage, Project Assigned, Department Assigned, Application Submitted Date, Projected Amount, etc)
      - Click Generate Report button to create Excel Spreadsheet <or>
      - Click Save Report Settings
         1. Name the report and provide a description
         2. Excel Spreadsheet is generated

Lesson 12 Key Takeaways:
- Understand how to run standard reports to generate the data you need
- Learn how to create custom reports in the "Report Builder" tool
- Understand how to save reports for future use

Lesson 12 Recommended Activities:
- Practice generating reports based on a series of data you may need in the future
- Build one report and save for future use