



eCivis

GRANTEE POST-AWARD

Training Package

Contents

Lesson 1: Processing an Award Notification 4

Lesson 2: New Grant Award Approvals 6

Lesson 3: Confirm Final Grant Budget (Finance Department)..... 6

Lesson 4: Setting Grant Goals and Performance Metrics 7

Lesson 5: Grant Amendments 8

Lesson 6: Scheduling Reports and Tasks 10

Lesson 7: Tracking Submitted Reports 12

Lesson 8: Grant Audit Trails 12

Lesson 9: Closeout..... 14

Lesson 10: Running Standard Reports..... 15

Lesson 11: Building Personal Reports 16

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

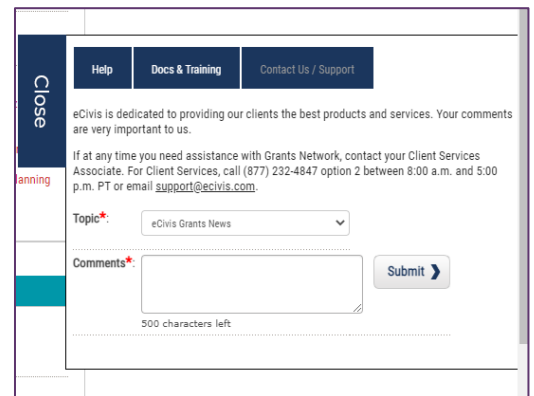
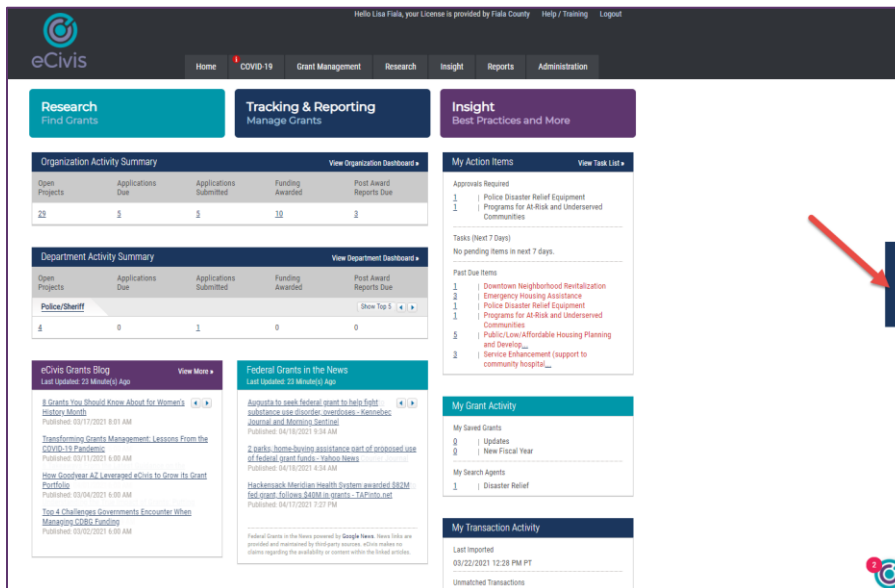
Takeaways

- 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: Processing an Award Notification

Lesson 1 Resources:

- [Lesson 1 Training Video \(length 6:23\)](#)
- [User Guide with Screen Shots Link](#)

Lesson 1 Outline:

1. Log grant status change for competitive grants. Select from the following AVAILABLE ACTIONS:
 - a. If awarded: *I have received my award notification and I have been awarded*
 - Fill award amount, match amounts, agreement period, etc.
 - Allocation option
 1. If allocating, select "yes"
 2. Enter the amount and funded departments
 3. Later, visit "GRANT RESEARCH>ALLOCATION SOURCES" to build sub-projects
 - Grant Tags
 - Attach award notification, agreement, etc.
 - Email alert to applicable staff (set in project or system-wide settings)
 - b. If not awarded: *I have received my award notification and I have not been awarded*
 - Indicate reasons
 - Attach award notification and other documents
 - Grant archived in project HISTORY tab
 - c. If resubmitting an application: *I need to resubmit my application*
 - Fill out application financial and other details
 - Attach new application files
 - Tracks an additional application event
 - d. If awarded but not accepting: *I am ready to close this grant*
 - Select "Awarded but not accepting" from the CLOSURE TYPE list
 - Grant archived in project HISTORY tab
2. Log grant status change for non-competitive grants. Select from the following AVAILABLE ACTIONS:
 - a. If projected grant award offer is received: *I want to enter my award amount*
 - Fill award amount, match amounts, agreement period, etc.
 - Allocation option
 1. If allocating, select "yes"
 2. Enter the amount and funded departments
 3. Later, visit "GRANT RESEARCH>ALLOCATION SOURCES" to build sub-projects
 - Grant Tags
 - Attach award notification, agreement, etc.
 - Email alert to applicable staff (set in project or system-wide settings)
 - b. If not awarded: *I have received my award notification and I have not been awarded*
 - Indicate reasons
 - Attach award notification and other documents
 - Grant archived in project HISTORY tab

- c. If awarded but not accepting: *I am ready to close this grant*
- Select “Awarded but not accepting” from the CLOSURE TYPE list
 - Grant archived in project HISTORY tab

Lesson 1 Key Takeaways:

- Understand how to advance the grant to the next applicable stage at time of award.
- Become familiar with the two unique workstreams of competitive and non-competitive grants.
- Learn how to move the grant status to “Awarded”, “Not Awarded”, “Resubmitting” or “Awarded but not Accepting.”

Lesson 1 Recommended Activities

- Practice changing, but not saving, the status of at least one grant to the categories above (if you have a grant you are ready to change the status of, go ahead and complete the process above).

Lesson 2: New Grant Award Approvals

Lesson 2 Resources:

- [Lesson 2 Training Video \(4:46\)](#)
- [User Guide with Screen Shots Link](#)

Lesson 2 Outline:

1. Assign Workflow Processes in PENDING TASKS section
 - a. Click each task title
 - b. Read description
 - c. Assign to applicable staff requesting approval
 - d. Select due date
 - e. Click SAVE
2. Complete workflow tasks in PENDING TASKS section
 - a. Click done
 - b. Approval Request Form
 - Add attachments
 - Select Due Date
 - Omit attachments from forwarding
 - Add notes
 - Click SAVE to send
 - c. Receive "Approval Response Notification" email
3. Verify Project and Grant ID's (if using financial data integration)
 - a. Go to Project Options
 - b. Edit Project
 - c. Internal Project ID
 - d. Project Dashboard
 - e. Contracts and Account Tab
 - f. Edit
 - g. Internal Grant ID

Lesson 2 Key Takeaways:

- Gain a deeper knowledge of how to work with tasks and assign workflows to sequential tasks
- Understand how to complete pending tasks
- Know how to verify/update both Project and Grant IDs

Lesson 2 Recommended Activities

- Create a sequential task for at least one saved grant
- Complete any pending tasks you have due
- If using Data Integration verify Project and Grant IDs in any approved grants

Lesson 3: Confirm Final Grant Budget (Finance Department)

Lesson 3 Resources:

- [Lesson 3 Training Video \(5:54\)](#)
- [User Guide with Screen Shots Link](#)

Lesson 3 Outline

1. Access stored budget
 - d. "I would like to create/manage a budget for this grant"
2. Apply edits to "Application Submitted" budget lines
 - a. Click OPEN icon on budget category
 - b. Click field you wish to edit
 - Edit cost line, add Grant Ledger "GL" codes, etc.
 - c. Add Subcategory
 - d. Add Row
 - e. Delete Row
3. Save & Lock final budget
 - a. Click SAVE
 - b. Click LOCK icon
 - c. Only OMAH (Organization Master Account Holder) can amend
 - d. Enter Post-Award budget stage
4. Spending reporting enabled
 - a. View spending against budget
 - b. Create report of custom time period
 - c. Export to Excel
5. Reconcile any UNCATEGORIZED TRANSACTIONS
 - a. OMAH to unlock and edit

Lesson 3 Key Takeaways:

- Know how to access the Pre-award budget
- Understand how to make changes to Pre-award budget at the time of award, as well as how to lock and finalize budget
- Know how to view, track and export spending reports (for clients who have eCivis' Data Integration service)
- Understand how to reconcile any uncategorized transactions

Lesson 3 Recommended Activities

- Access at least one budget you have saved and go through the motions of making updates to said budget. Lock and save if finalized – if not you can also choose "Cancel"
- View grant spending reports and reconcile any uncategorized transactions

Lesson 4: Setting Grant Goals and Performance Metrics

Lesson 4 Resources:

- [Lesson 4 Training Video \(3:38\)](#)
- [User Guide with Screen Shots Link](#)

Lesson 4 Outline:

1. Set goals for grant performance
 - a. Click ADD GRANT GOAL icon
 - b. Goal type
 - GOAL
 - OBJECTIVE
 - OUTCOME
 - PRIORITY
 - OTHER (create your own name)
 - c. Goal Title
 - d. Goal Description

Lesson 4 Key Takeaways:

- Know how to add grant goal with description

Lesson 4 Recommended Activities

- Set goals for at least one saved grant

Lesson 5: Grant Amendments

Lesson 5 Resources:

- [Lesson 5 Training Video \(2:52\)](#)
- [User Guide with Screen Shots Link](#)

Lesson 5 Outline

1. Select "I have received a grant adjustment notice and need to amend my grant agreement" from the AVAILABLE ACTIONS
 - a. Select Amendment Type
 - b. Award Notification Date
 - c. Adjustment Notification Date
 - d. Award Adjustment
 - e. Adjusted Total Award– Click to see all Existing Amendments
 - f. Grant Amendment Notes
2. Hover over Awarded to see Grant Amendment History
3. Grant Amendment Notification e-mail sent
4. For any amendments affecting locked budget, budget will need to be unlocked and updated to reflect those changes.

Lesson 5 Key Takeaways:

- Understand how to document and manage a grant agreement
- Know how to view Grant Amendment history

Lesson 5 Recommended Activities

- Practice amending portions of awarded grants, hitting "Cancel" unless you would like to save changes

Lesson 6: Scheduling Reports and Tasks

Lesson 6 Resources:

- [Lesson 6 Training Video \(8:02\)](#)
- [User Guide with Screen Shots Link](#)

Lesson 6 Outline:

1. Set grant report roadmap (Fiscal and Programmatic)
 - a. Select "I am ready to schedule my report" from AVAILABLE ACTIONS
 - b. Click SCHEDULE NEW REPORT
 - Recurring report tasks (when possible)
 1. Select the ADVANCED task wizard setup
 2. **Step 1:** Task name, description (e.g. "Quarterly Financial Report"), attachments
 3. Select grant
 4. Select grant stage
 5. Select Task Scoring Rubric (Performance, File/Reporting, Spending task)
 6. **Step 2:** (skip)
 7. **Step 3:** Select ASSIGNED TO from project team members
 8. **Step 4:** Select first report due date and reminder dates
 9. **Step 5**
 - a. Select the TASK REPEATS option
 - b. Set recurrence intervals (weeks vs. months and how many weeks/months?)
 - c. Set occurrence dates
 - d. Set creation timeline for future tasks
 - e. Set end date in the "Until" section
 - Or, Create reports individually
 1. Click the SIMPLE task wizard setup
 2. Set task name, grant, and stage
 3. Select Task Scoring Rubric (Performance, File/Reporting, Spending task)
 4. Select ASSIGNED TO from project team members (metrics)
 5. Due date and reminder date
 6. Add attachments
 7. Task description
2. Staying Alert on Tasks
 - a. Email alert reminders
 - b. Project Calendar
 - My Projects vs. All Projects
 - Calendar View vs. List View
 - c. "Add to Calendar" option
 - Exports ".ics" file for import to Gmail, Outlook, etc.
 - Click calendar icon next to task in project

Lesson 6 Key Takeaways:

- Know how to setup a Scheduled Report task (i.e. quarterly Financial Reports)
- Learn how to setup any required programmatic reports (i.e. midterm report)
- Understand how to view and manage your tasks

Lesson 6 Recommended Activities

- Go into at least one awarded grant and setup automated report requirements such as a financial report or a midterm report

Lesson 7: Tracking Submitted Reports

Lesson 7 Resources:

- [Lesson 7 Training Video \(3:47\)](#)
- [User Guide with Screen Shots Link](#)

Lesson 7 Outline:

1. Submit report to Grantor by due date (outside of eCivis)
 - a. Access any forms you have attached to the task
 - Paperclip icon
2. Log a submitted report
 - a. Click checkbox for task name (if assigned to you)
 - b. SUBMITTED ON
 - c. SUBMITTED BY
 - d. Select Report Type
 - If you have data integration you can SELECT TRANSACTIONS
 - e. Attach submitted documents/files
 - f. Click SAVE
3. View or edit past task activity
 - a. Click COMPLETED TASKS from Project Dashboard
 - b. Access/edit files or notes
 - c. Click EDIT (pencil icon) to edit completed task data (dollar amounts, notes, dates, etc.)
4. View Spending Summary
 - a. Spending Tab
 - b. Spending Report
 - Life-to-Date Expenditures
 - Balance Available
 - Reimbursement Requested and Received
 - Shows ALL current submitted Spending Reports

Lesson 7 Key Takeaways:

- Understand how to complete and document a Scheduled Report task
- Learn how to enter spending information
- Know how to view the spending of your grant award

Lesson 7 Recommended Activities

- Practice going through the motions of submitting a report

Lesson 8: Grant Audit Trails

Lesson 8 Resources:

- [Lesson 8 Training Video \(3:18\)](#)
- [User Guide with Screen Shots Link](#)

Lesson 8 Outline:

1. View or edit grant stages
 - a. Click GRANT LIFECYCLE tab
 - b. Access/edit files or notes
 - c. Click EDIT (pencil icon) to edit grant stage details (dollar amounts, notes, dates, etc.)
2. Audit grant approvals
 - a. Click APPROVAL HISTORY
 - b. Sorted by time of action
3. Audit Reports
 - a. Spending Report
 - b. Transaction Report
 - c. Budget Revision Report

Lesson 8 Key Takeaways:

- Understand how to view and edit the full grants lifecycle
- Know how to view approval history
- Understand how to run audit reports

Lesson 8 Recommended Activities

- View the grant lifecycle for at least 2 of your saved grants
- Practice running all 3 types of audit reports – Spending, Transaction and Budget Revision

Lesson 9: Closeout

Lesson 9 Resources:

- [Lesson 9 Training Video \(3:08\)](#)
- [User Guide with Screen Shots Link](#)

Lesson 9 Outline:

1. Closing Your Grant
 - a. Submit closeout documents to Grantor (outside of eCivis)
 - Reminded by email notification (if reminder option selected during Grant Award stage)
 - b. Confirm CLOSED status in eCivis
 - Select "I am ready to close this grant"
 - CLOSED DATE
 - CLOSED BY
 - CLOSURE TYPE
 - Notes
 - Attach closeout documents
 - Click SAVE
 - c. Viewing PROJECT HISTORY
 - GRANTS AWARDED (but closed)
 - GRANTS NOT AWARDED
 - GRANTS NOT PURSUED
 - d. Secure archival
 - Grant cannot be re-opened without help
 - Grant lifecycle and tasks are visible but no longer available for edit
2. Closing Your Project
 - a. Click PROJECT OPTIONS
 - b. Select CLOSE PROJECT
 - c. Secure archival
 - Project cannot be re-opened without help
 - Grant lifecycle and tasks are visible but no longer available for edit

Lesson 9 Key Takeaways:

- Know how to complete basic grant closeout
- Understand what steps need to be taken to successfully close a grant and project

Lesson 9 Recommended Activities

- Practice going through the motions of closing at least 1 of your active grants, hitting "Cancel" at the end

Lesson 10: Running Standard Reports

Lesson 10 Resources:

- [Lesson 10 Training Video \(12:56\)](#)
- [User Guide with Screen Shots Link](#)

Lesson 10 Resources:

1. Research related reports
 - a. Research Activity
 - b. Grant Review Report
2. Administration related reports
 - a. Grant Conflict Report
 - b. Organization Goals
 - c. Tasks Report
3. Grant management reports
 - a. Activity Reports (Apps Submitted, etc.)
 - b. Audit Reports (Transaction Report, Budget Revision Report, etc.)
 - c. Funding Reports (Win Rate, Funding Source, etc.)
 - d. Grant Assessment Dashboard

Lesson 10 Key Takeaways:

- Understand what built-in reports are available to you within Grants Network

Lesson 10 Recommended Activities

- Practice running all of the built-in reports and reviewing what data is available to you

Lesson 11: Building Personal Reports

Lesson 11 Resources:

- [Lesson 11 Training Video \(length 7:17\)](#)
- [User Guide with Screen Shots Link](#)

Lesson 11 Outline

1. Completely customizable grant reports
 - a. Select departments, grant types and grant stages
 - b. Select data points to analyze
2. Exports to excel
3. Can be saved for future use
 - a. Select SAVE REPORT SETTINGS
 - b. Open MY SAVED REPORTS
 - RUN report
 - EDIT report
 - DELETE report

Lesson 11 Key Takeaways:

- Understand how to use Report Builder for custom reports
- Know how to edit, run and delete saved reports

Lesson 11 Recommended Activities

- Build a custom report you believe will be useful to you in the future and run the report
- View “My Saved Reports” to ensure your report has been saved