Grants.gov Workspace Overview

for Federal Demonstration Partnership

May 11, 2017

GRANTS.GOV℠

Agenda

- Objective and Benefits of Workspace
- Retire Legacy PDF Application Package
- Live-Demonstration of Workspace
- Upcoming Changes in June 2017
- Upcoming Changes in October 2017
- Questions and Feedback

Objective of Workspace

To enhance the Grants.gov Apply functionality by providing applicants with a shared, online environment to collaboratively complete and submit grant applications

Benefits of Workspace

- Multiple users can concurrently complete the application forms
- Reuse/copy prior Workspace forms to pre-populate a new Workspace
- Upfront validation allows applicants to correct application errors prior to submission thus drastically reducing the number of Grants.gov rejections

Benefits of Workspace

- Complete an application form using our new online webforms or downloading/uploading the PDF form; applicants can seamlessly switch between online and offline

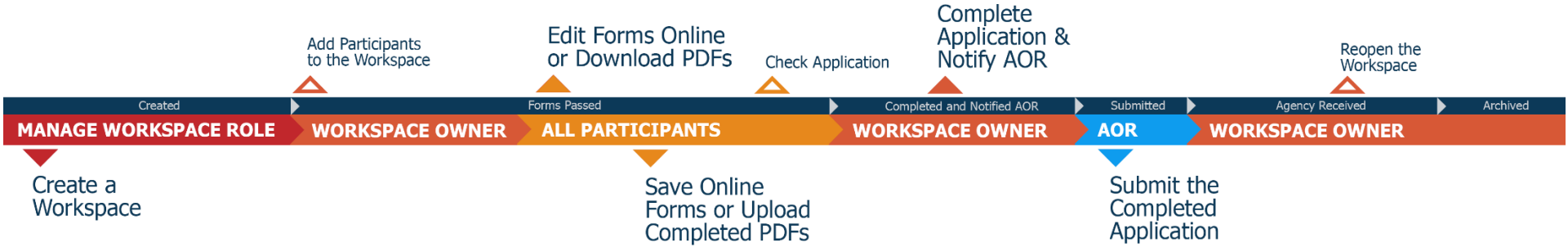
- Grantor changes to the Opportunity Package are immediately reflected in Workspace

Retire Legacy PDF Application Package

Legacy PDF Application Package will be phased out on December 31, 2017.

- Applicants will no longer be able to download the older, single PDF application package of forms.
- Applicants can apply for grants using Grants.gov Workspace, which separates the application package into individual forms. Applicants can create a workspace, complete the webforms online or by filling out the separate PDF forms, and submit their application workspace package.
- The online webforms interface is now available in Grants.gov and is only accessible through Workspace.
- For any funding opportunities where applicants have downloaded the legacy PDF application package, they will be able to continue to submit that package until March 31, 2018.
- S2S Submissions will continue to be supported.

Live Demonstration of Workspace



In this live demonstration, we will cover the following key actions for applying on Grants.gov using Workspace:

- Workspace Process and Roles Overview
- Creating a Workspace
- Managing Participants & Roles
- Completing Online and Offline Workspace Forms
- Submitting via Workspace

Workspace Resources

- For more information about Grants.gov Workspace, please visit our various Workspace resources:
  - Grants.gov Workspace Overview
  - Grants.gov Workspace Training Video Series
  - Grants.gov Community Blog articles on Workspace
  - Grants.gov Online User Guide

- Grants.gov Applicant Support
  - 1-800-518-4726
  - support@grants.gov

- Grants.gov Community Blog article: “7 Tips for Transitioning Your Organization to Grants.gov Workspace”
  https://blog.grants.gov/2016/10/18/7-tips-for-transitioning-your-organization-to-workspace/

- Grants.gov Workspace Roles and Access Levels
  - Training video: https://www.youtube.com/watch?v=4RnSfnZJB6w
  - Blog: “Defining Grants.gov Workspace Roles and Access Levels”
    https://blog.grants.gov/2017/03/13/defining-grants-gov-workspace-roles-and-access-levels/

Upcoming Changes in June 2017

- Allow Applicants to be added to a Workspace regardless of Organization affiliation
- Forms-Level Access Control for applicants within Workspace
- Workspace Progress Bar
- Clarify link to access Webforms by renaming Edit link to Webform

For more details, please review R16.0 Release Notes available at: https://www.grants.gov/web/grants/outreach/releases.html

Upcoming Changes in October 2017

- Workspace Enhancements
  - Enhanced Workspace copy features
  - Include PDF attachments in Application Preview
- Subscription Management
  - View and Manage subscriptions
  - One-Click Subscribe to Opportunity and Saved Search
  - Requires a Grants.gov account
  - Streamlined registration process

Questions and Feedback

Please provide your name, organization, and email address on the sign-in sheet

- We will send you a follow-up email with this presentation which includes summary slides with information covered in the live demonstration.
- We will also ask for your feedback about this Grants.gov Workspace demonstration
  - Was this session beneficial and would you like more training offered at future Federal Demonstration Partnership conferences?

- If you have any feedback or follow-up questions about this presentation, please contact us via email at community@grants.gov
- For all other Grants.gov inquiries and assistance, please contact the Grants.gov Contact Center at support@grants.gov or call 1-800-518-4726

Connect with Grants.gov

Follow us on Twitter:
@grantsdotgov

Video tutorials
on YouTube

Community Blog

Subscribe to our blog:
Blog.Grants.gov

Bookmark our
Online User Guide

Email Us:
Community@grants.gov

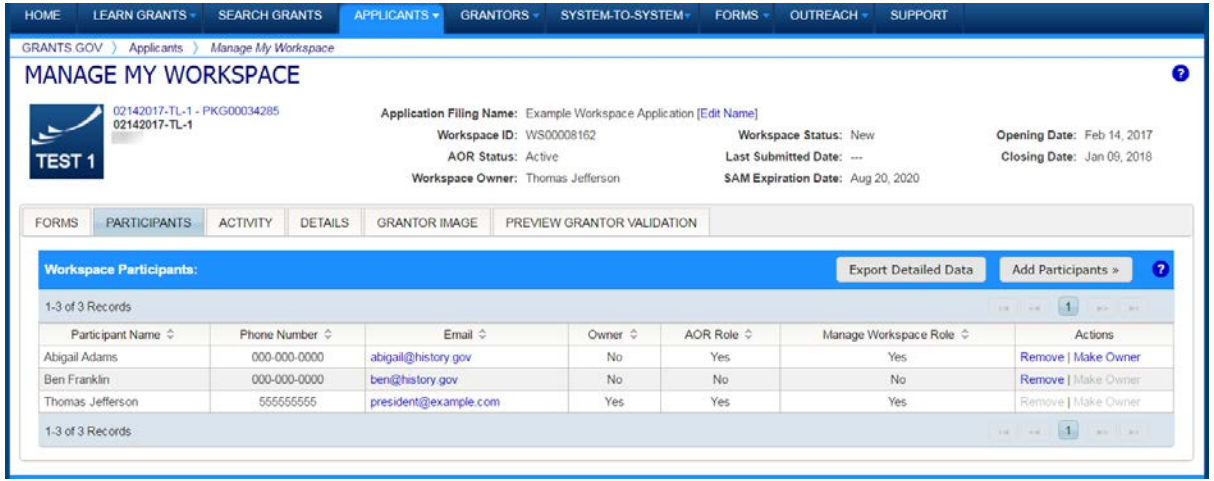
GRANTS.GOV WORKSPACE OVERVIEW

OVERVIEW

- What Is Workspace?
- Why Use Workspace?
- The Process
  - Creating a Workspace
  - Managing Participants & Roles
  - Completing Workspace Forms
  - Submitting Via Workspace
- EBiz POC Actions

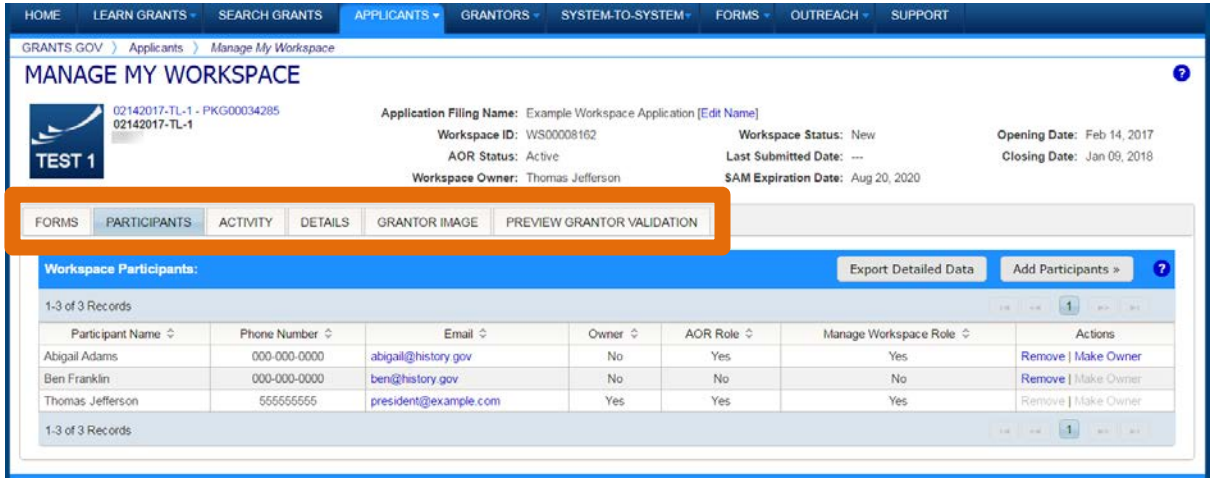
WHAT IS WORKSPACE?

The space where you work on your grant application



Workspace is a **shared, online environment** where members of the same organization may simultaneously access and edit different forms within an application.

WHAT IS WORKSPACE?

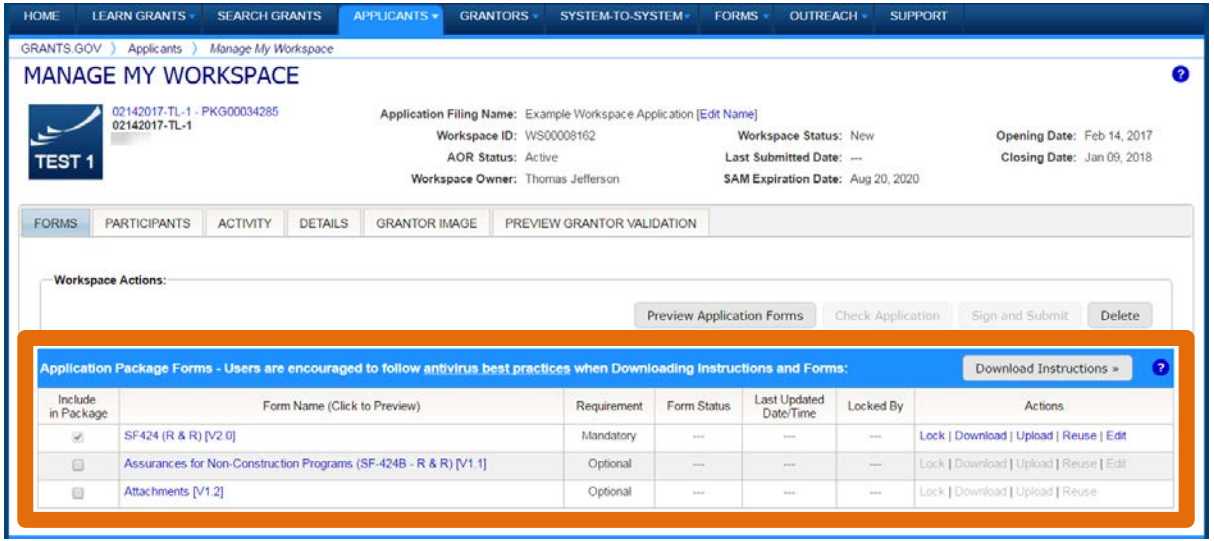


Each workspace has 4 tabs: **Forms**, **Participants**, **Activity** and **Details**

Some have 2 more tabs based on grantor agency services (*currently NIH-only*): **Grantor Image** and **Preview Grantor Validation**

The top section of each workspace contains key information about the application status.

WHAT IS WORKSPACE?

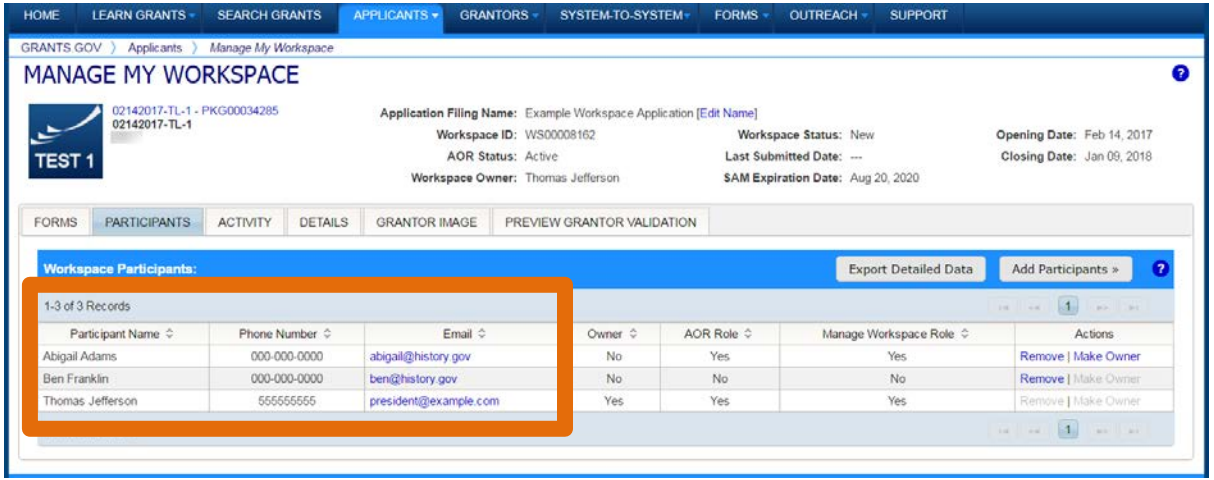


The **Forms** tab contains individual forms that are part of the workspace application package.

Key Actions:

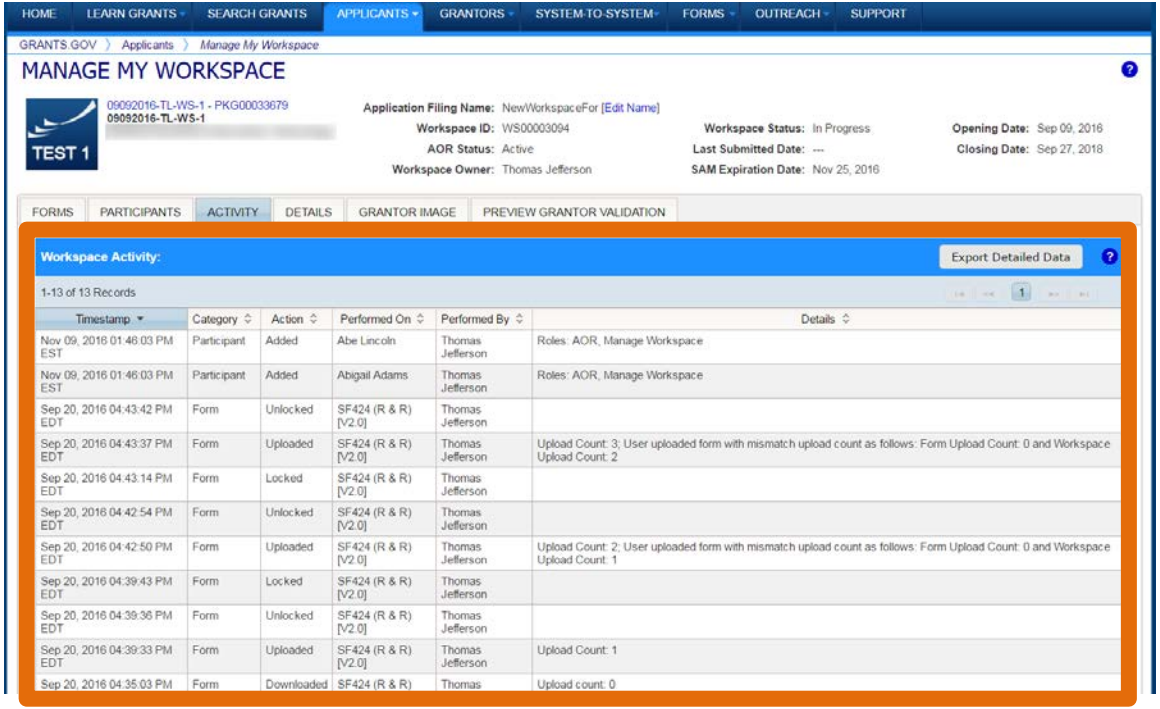
- Edit online forms (*if available*)
- Lock/Unlock forms
- Download/Upload PDF forms
- Reuse a forms

WHAT IS WORKSPACE?



The **Participants** tab lists the members, or "Participants," of a workspace who work as a team to complete the required forms for a federal grant.

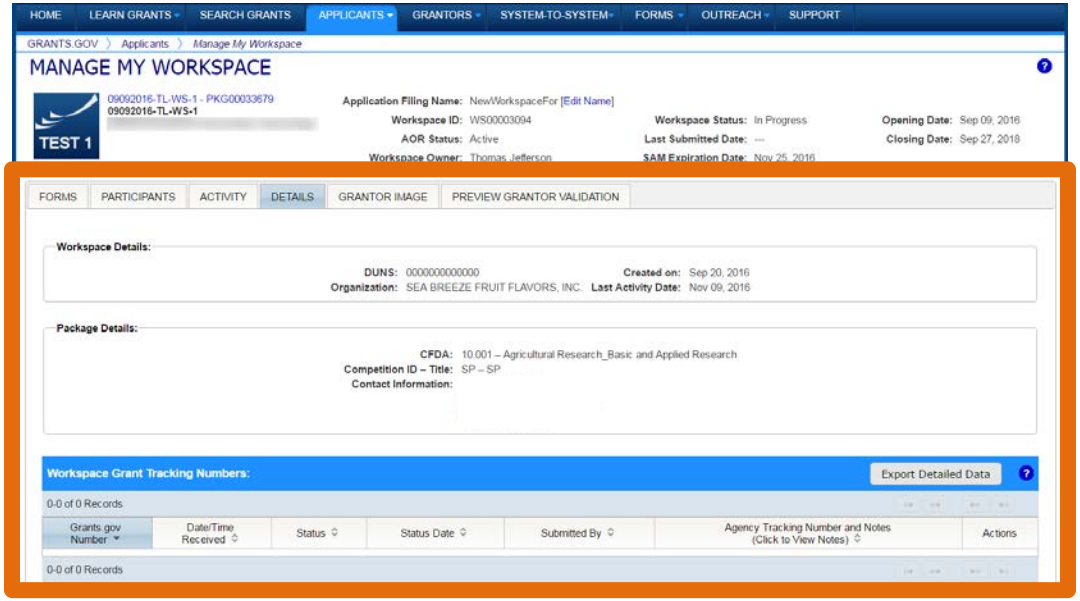
WHAT IS WORKSPACE?



Timestamp	Category	Action	Performed On	Performed By	Details
Nov 09, 2016 01:46:03 PM EST	Participant	Added	Abe Lincoln	Thomas Jefferson	Roles: AOR, Manage Workspace
Nov 09, 2016 01:46:03 PM EST	Participant	Added	Abigail Adams	Thomas Jefferson	Roles: AOR, Manage Workspace
Sep 20, 2016 04:43:42 PM EDT	Form	Unlocked	SF424 (R & R) [V2.0]	Thomas Jefferson	
Sep 20, 2016 04:43:37 PM EDT	Form	Uploaded	SF424 (R & R) [V2.0]	Thomas Jefferson	Upload Count: 3; User uploaded form with mismatch upload count as follows: Form Upload Count: 0 and Workspace Upload Count: 2
Sep 20, 2016 04:43:14 PM EDT	Form	Locked	SF424 (R & R) [V2.0]	Thomas Jefferson	
Sep 20, 2016 04:42:54 PM EDT	Form	Unlocked	SF424 (R & R) [V2.0]	Thomas Jefferson	
Sep 20, 2016 04:42:50 PM EDT	Form	Uploaded	SF424 (R & R) [V2.0]	Thomas Jefferson	Upload Count: 2; User uploaded form with mismatch upload count as follows: Form Upload Count: 0 and Workspace Upload Count: 1
Sep 20, 2016 04:39:43 PM EDT	Form	Locked	SF424 (R & R) [V2.0]	Thomas Jefferson	
Sep 20, 2016 04:39:36 PM EDT	Form	Unlocked	SF424 (R & R) [V2.0]	Thomas Jefferson	
Sep 20, 2016 04:39:33 PM EDT	Form	Uploaded	SF424 (R & R) [V2.0]	Thomas Jefferson	Upload Count: 1
Sep 20, 2016 04:35:03 PM	Form	Downloaded	SF424 (R & R)	Thomas	Upload count: 0

The **Activity** tab lists the actions that Participants have taken within the workspace.

WHAT IS WORKSPACE?



The **Details** tab lists submission history, including links to download every submitted (and re-submitted) application.

WHY USE WORKSPACE?

1

Workspace helps to **streamline the collaboration process** on a federal grant application.

WHY USE WORKSPACE?

2

Workspace helps applicants to **save time** by allowing for the reuse of forms across multiple workspaces.

WHY USE WORKSPACE?

3

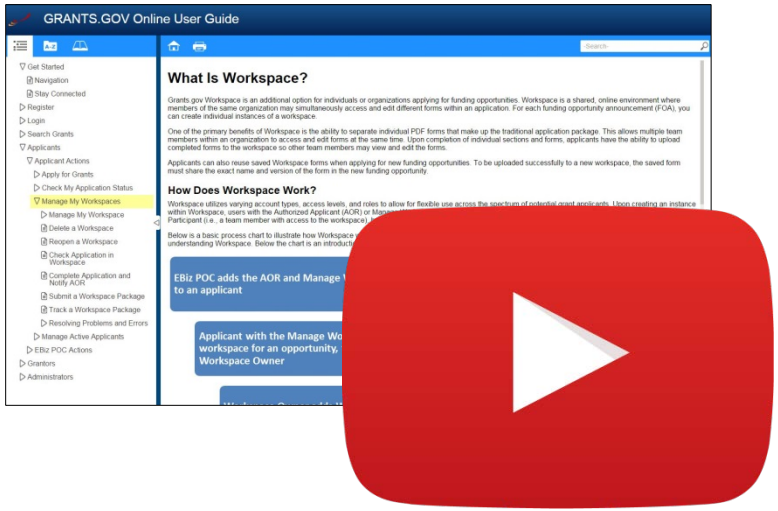
Forms are **validated** when they are uploaded to the workspace, virtually eliminating last-minute submission errors.

WHY USE WORKSPACE?

4

Workspace is easy to learn thanks to **context-sensitive help articles** accessible on every page and window.

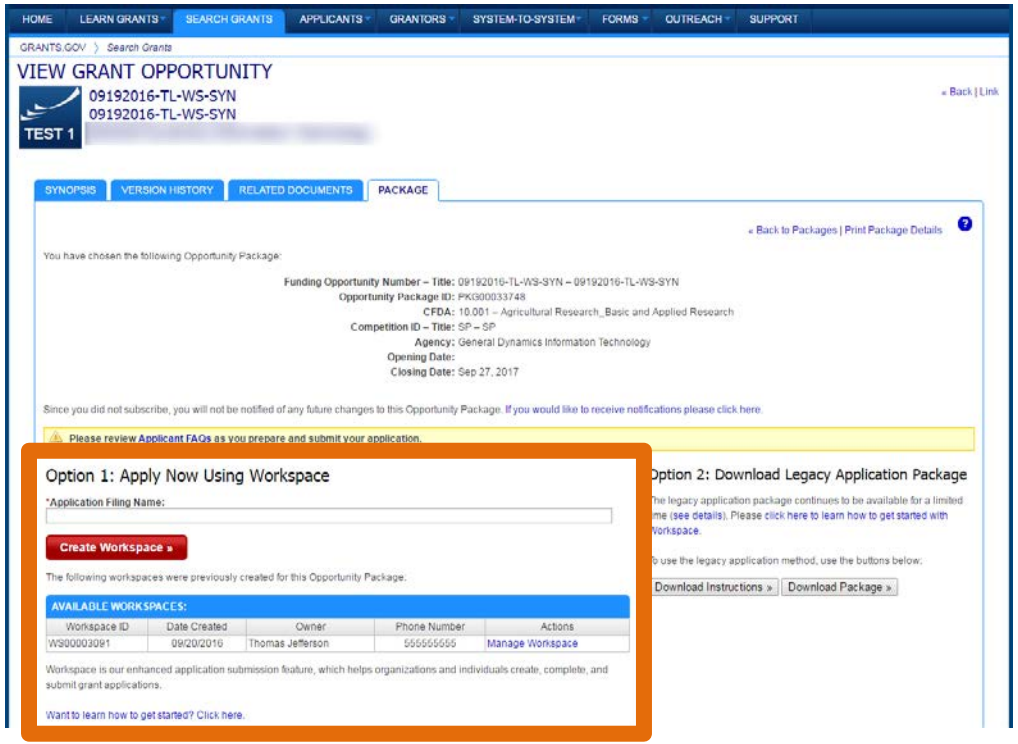
WHY USE WORKSPACE?



Resources

- [Video: Introducing Workspace Functionality]
- [Grants.gov: Workspace Overview]

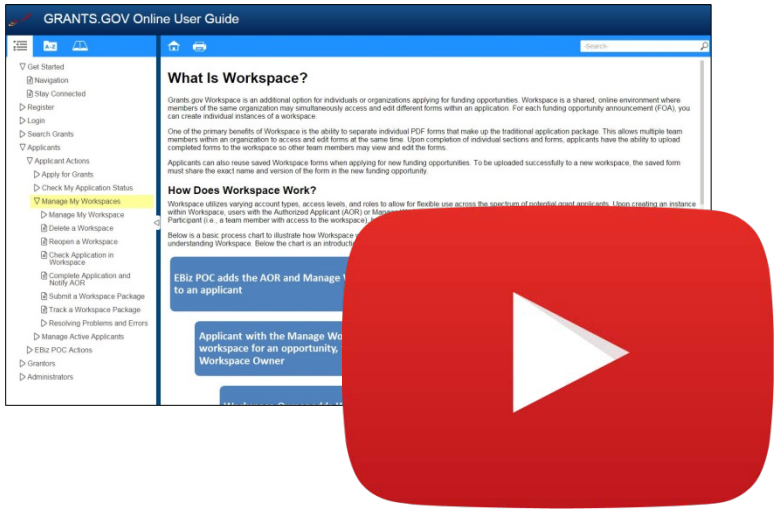
CREATING A WORKSPACE



After logging in, create a workspace by visiting the **View Grant Opportunity** page and clicking the Package tab.

If the application package is compatible with Workspace, you will be able to create a new workspace.

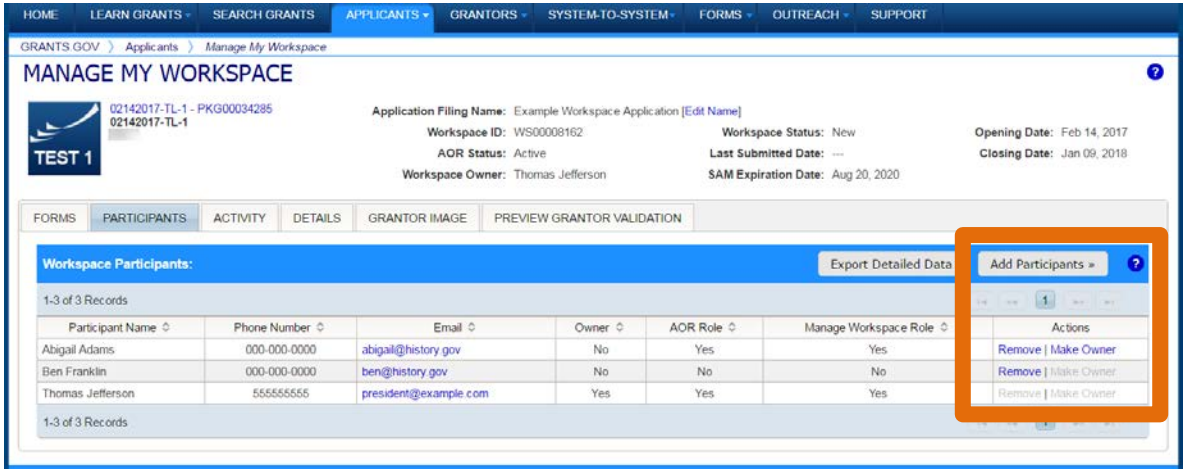
CREATING A WORKSPACE



Resources

- **Video: How to Create a Workspace**
- **Online User Guide: Create a Workspace**

MANAGING PARTICIPANTS & ROLES



Adding Participants:

Click the **Add Participants** button and search for an active user account

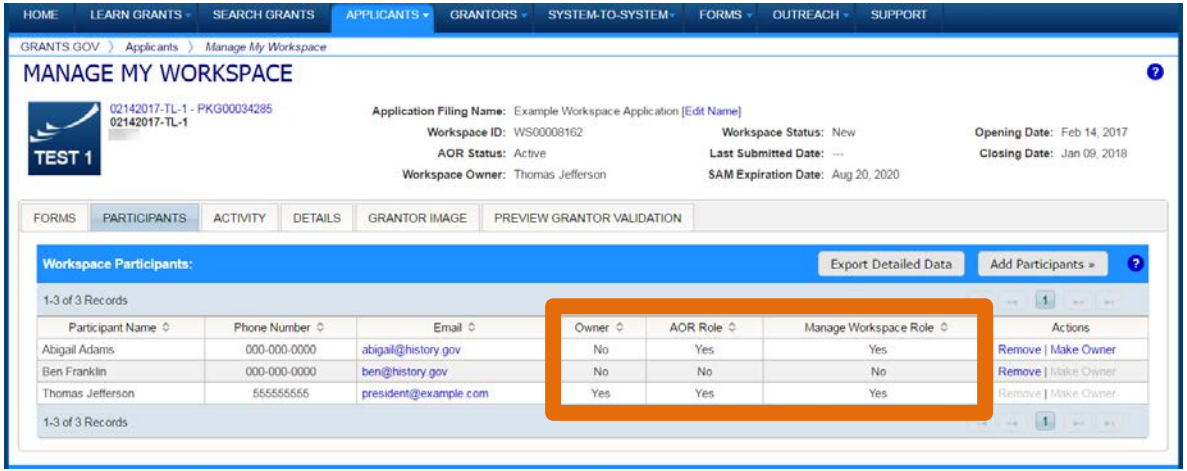
Removing Participants:

Click the **Remove link** on the Participant record in the workspace

Reassigning Ownership:

Click the **Make Owner** link on the Participant record in the workspace

MANAGING PARTICIPANTS & ROLES



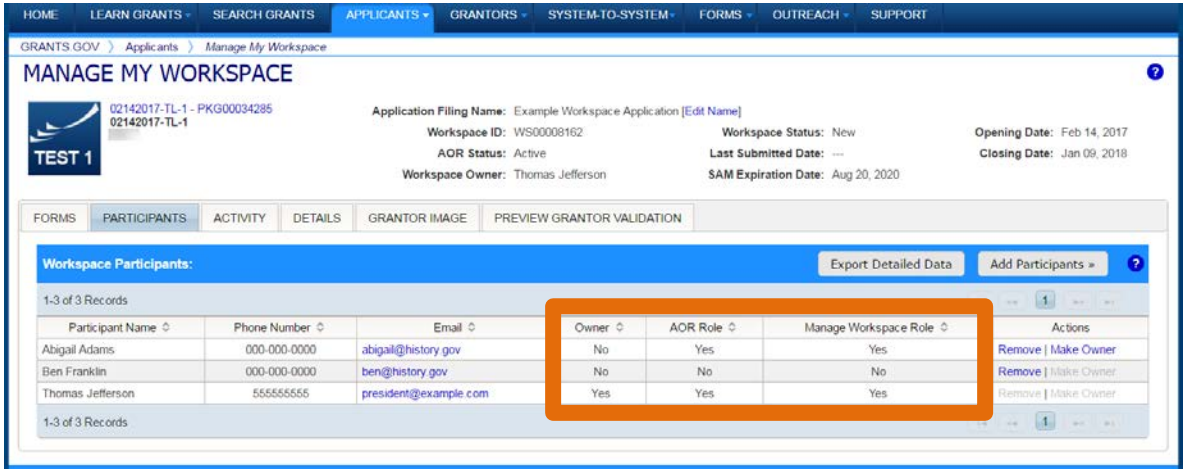
Roles:

- AOR role (*automatically receive Manage Workspace role*)
- Manage Workspace role

Account Types:

- E-Business Point of Contact (EBiz POC)
- Individual Applicant
- Organization Applicant

MANAGING PARTICIPANTS & ROLES



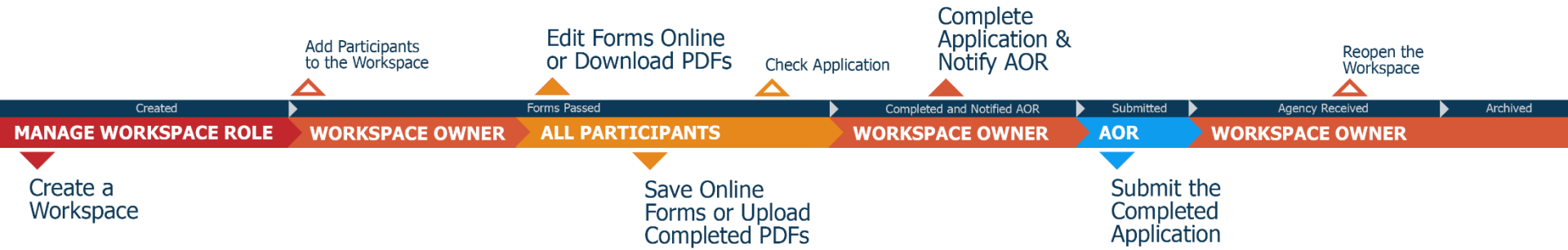
Access Levels:

- Workspace Owner
- Workspace Participant
- AOR with MPIN
- AOR with standard access
- AOR with expanded access*

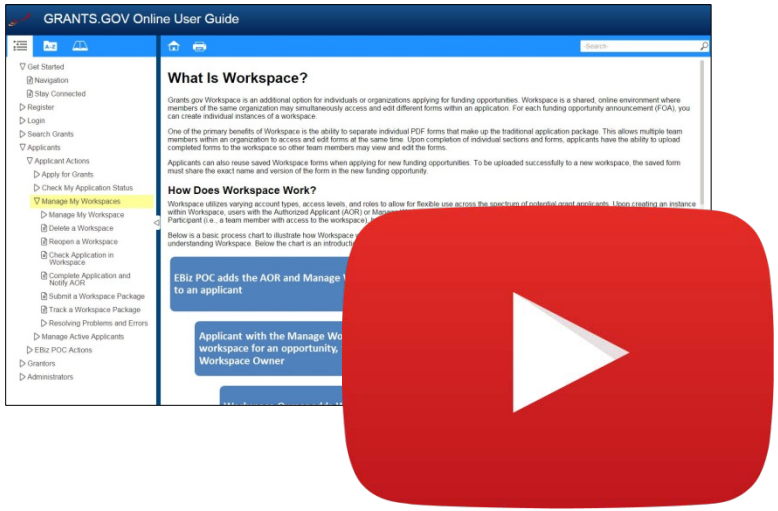
***AORs with expanded access** are able to view and submit the application for any workspace within the organization.

MANAGING PARTICIPANTS & ROLES

This timeline shows how each user fits into the workspace workflow:



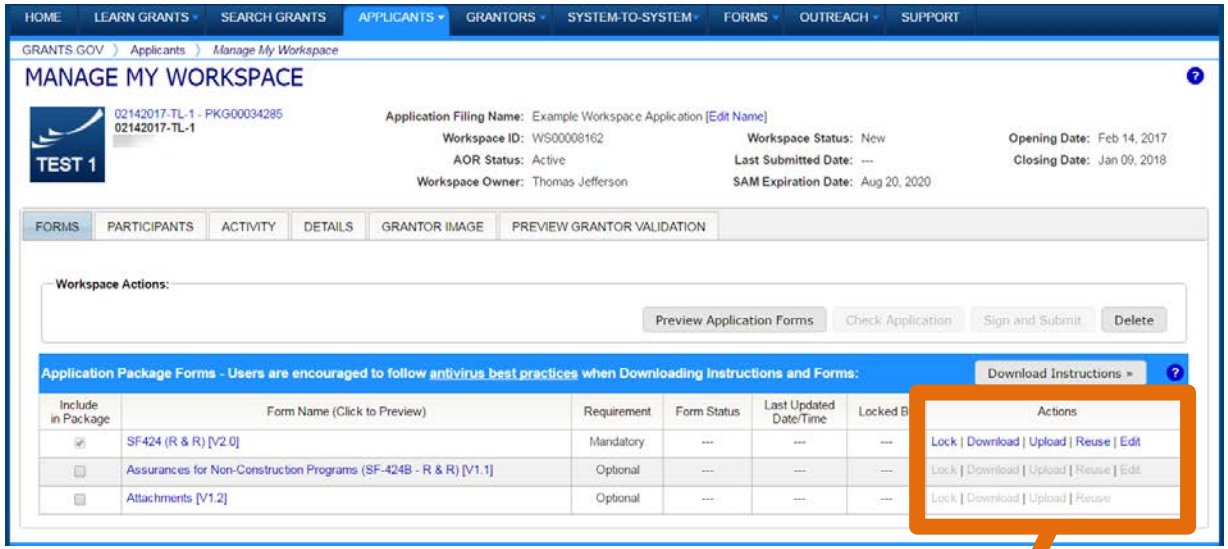
MANAGING PARTICIPANTS & ROLES



Resources

- Grants.gov: Workspace Process
- Grants.gov: Workspace Roles and Access
- Video: Understanding User Roles in Workspace
- Video: Reassign Ownership of a Workspace
- Online User Guide: Roles for Workspace Participants
- Online User Guide: Add and Remove Participants

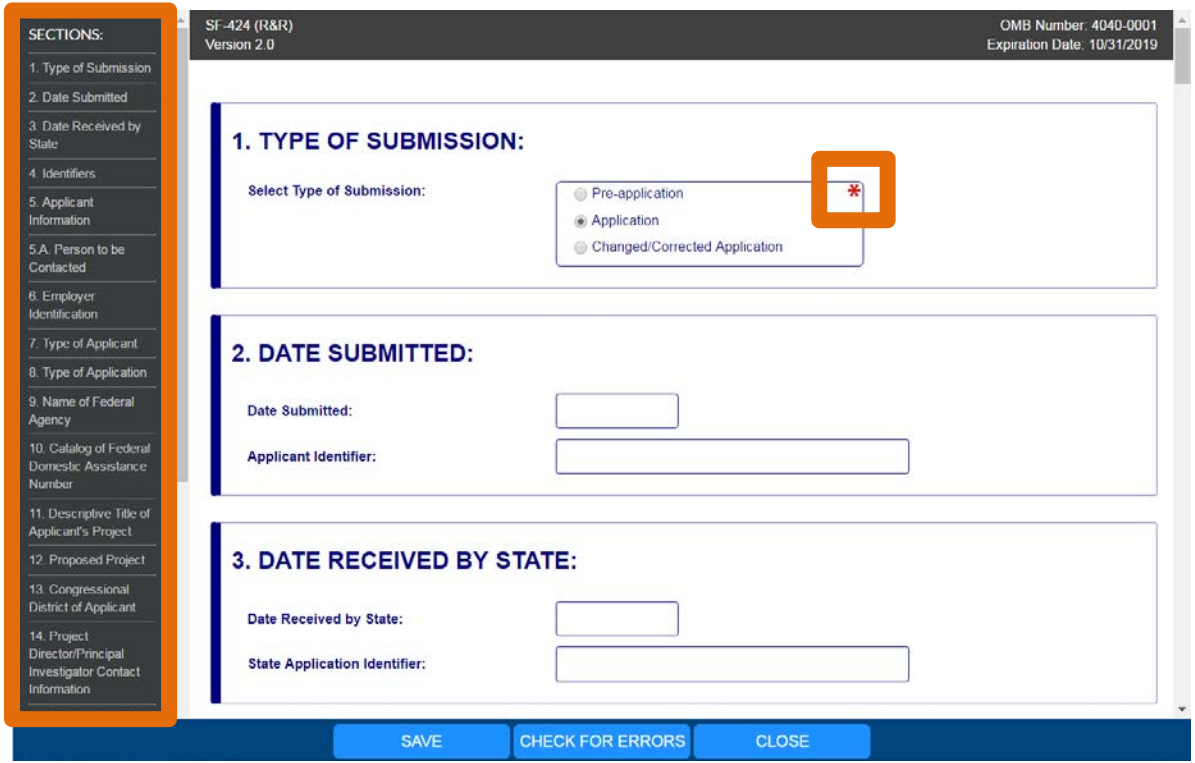
COMPLETING WORKSPACE FORMS



Key Actions:

- Edit online webforms (*if available*)
- Download and Upload PDF forms
- Lock/Unlock forms

COMPLETING ONLINE WEBFORMS



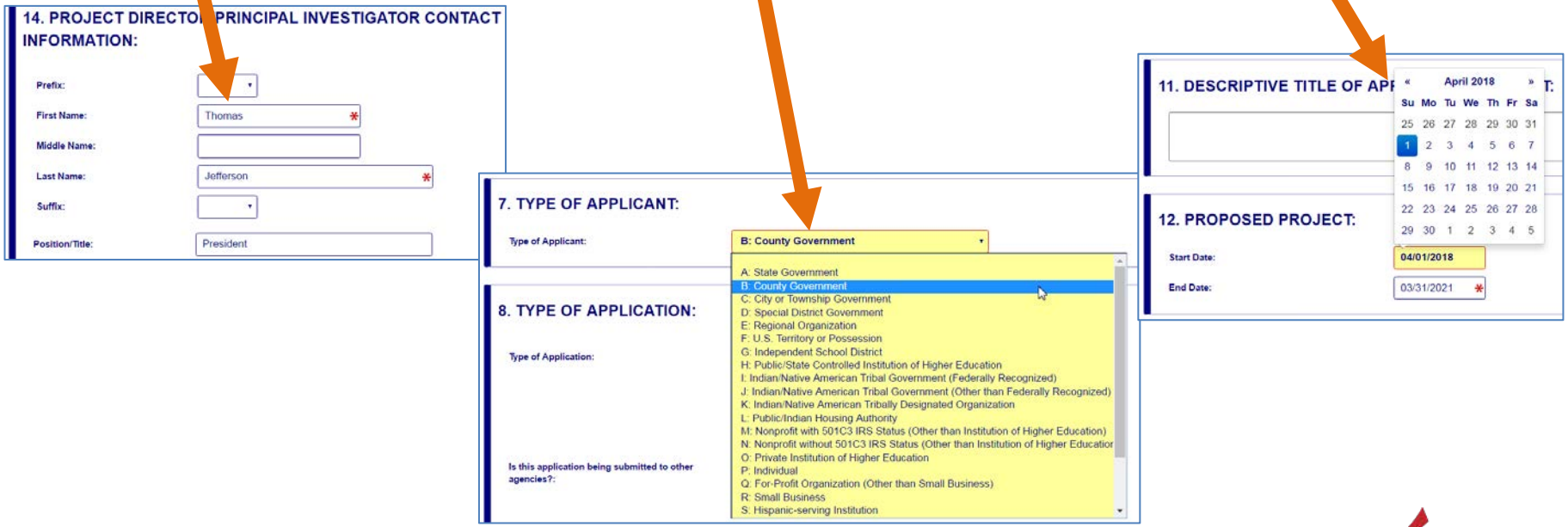
Online Form Basics:

- Complete online webforms in browser
- Navigate by clicking sections
- Tab through form fields
- Required fields have red asterisk

COMPLETING ONLINE WEBFORMS

Filling Out Fields:

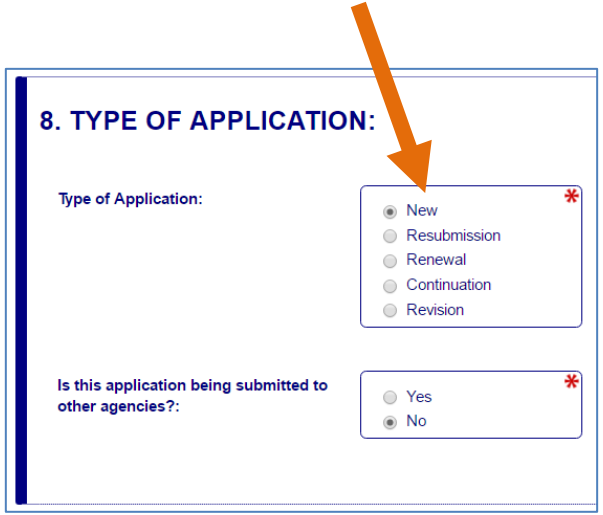
- Open text entry
- Drop-down menu
- Dates/calendar



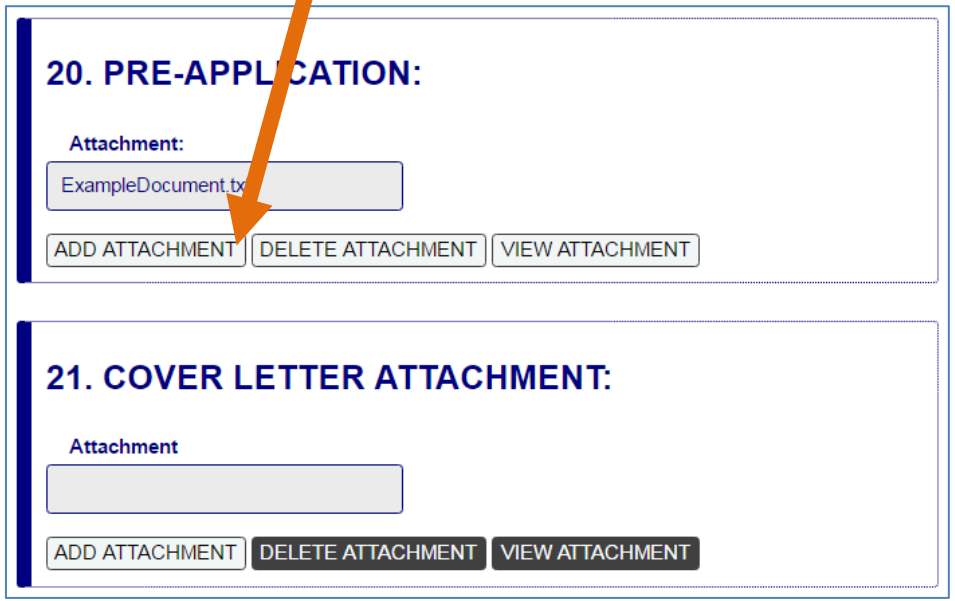
COMPLETING ONLINE WEBFORMS

Filling Out Fields:

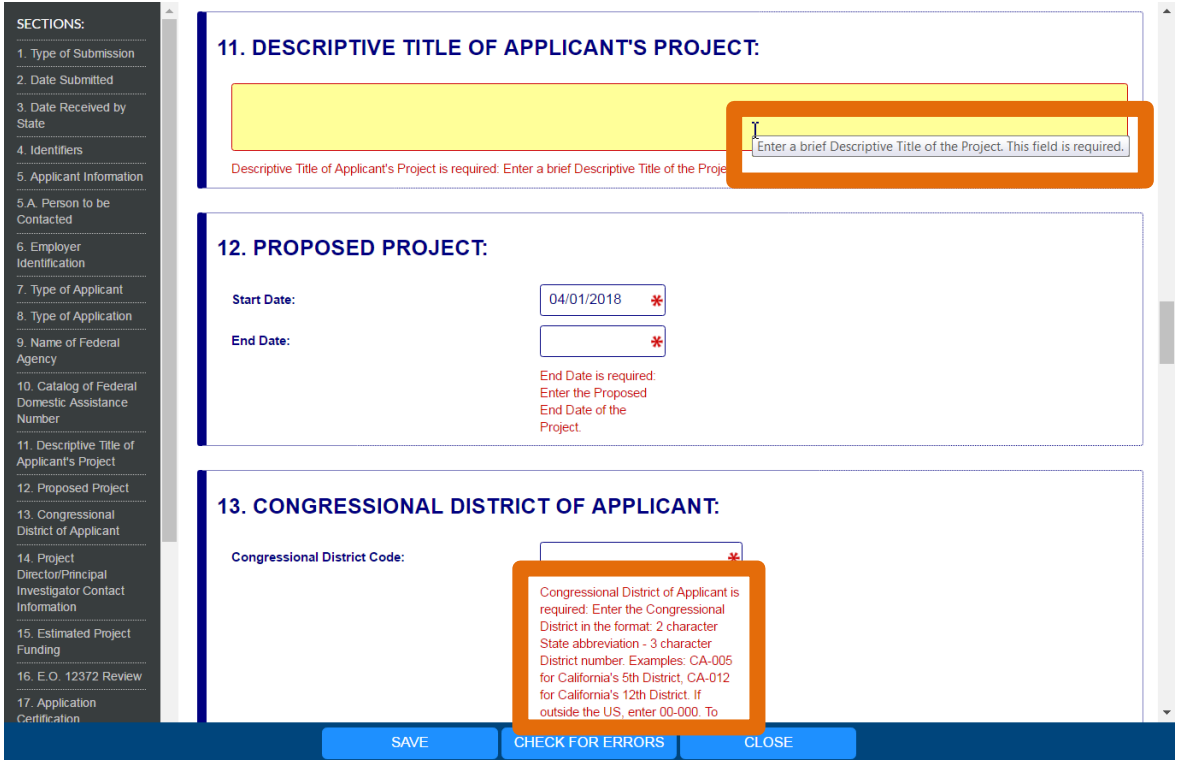
- Radio buttons (multiple choice)



- Attach files within online webform



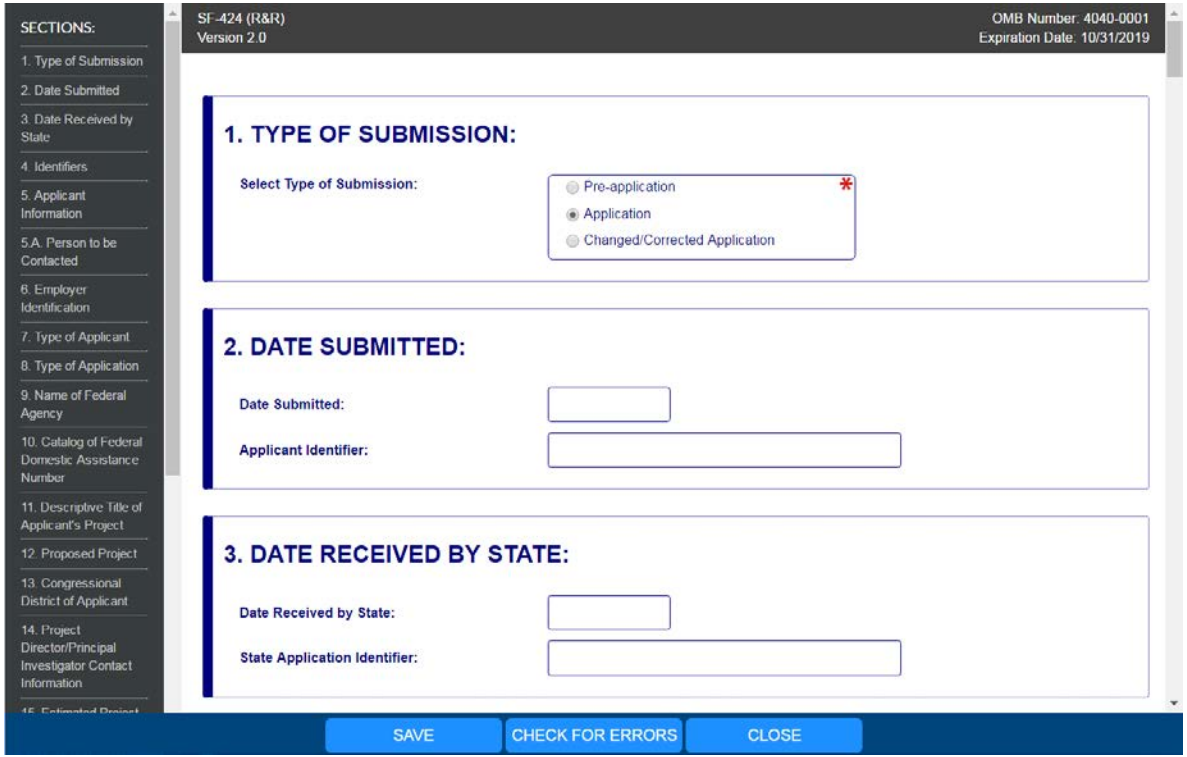
COMPLETING ONLINE WEBFORMS



More Features:

- Hover mouse over form fields for help
- Error messages explain how to fill out form fields

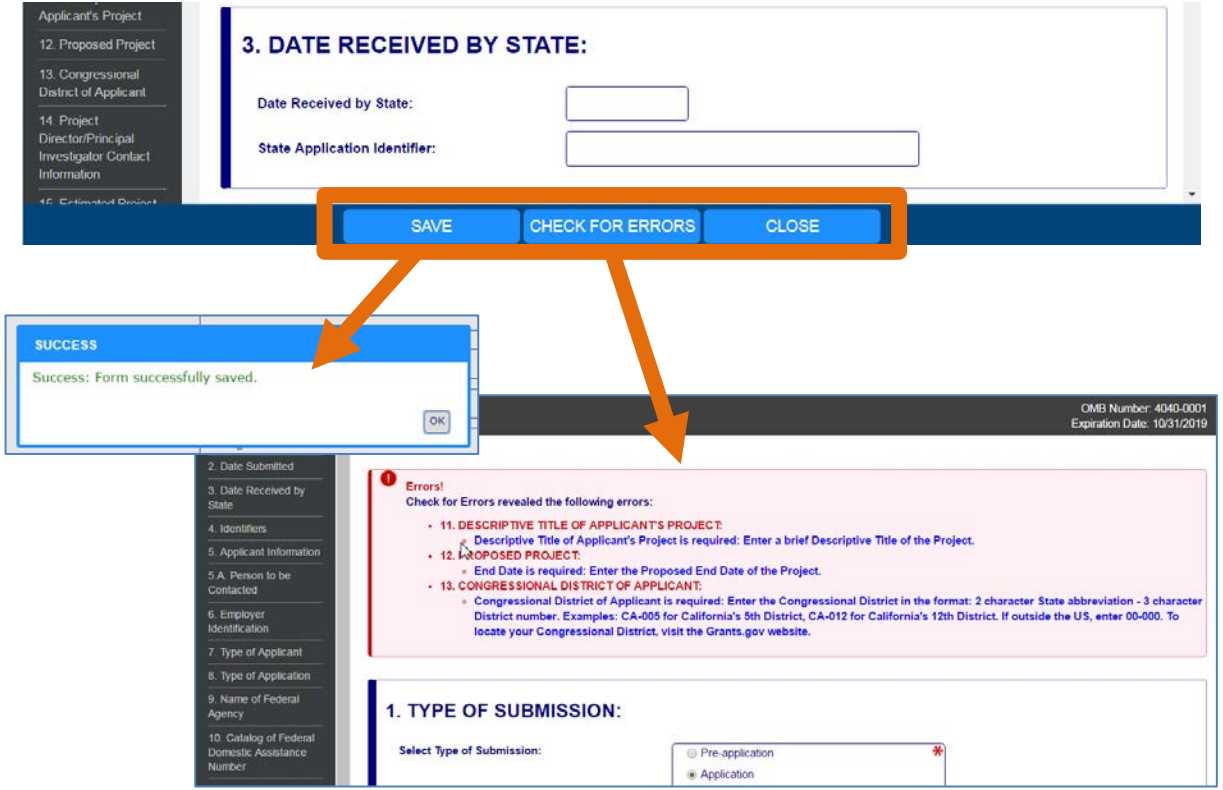
COMPLETING ONLINE WEBFORMS



More Features:

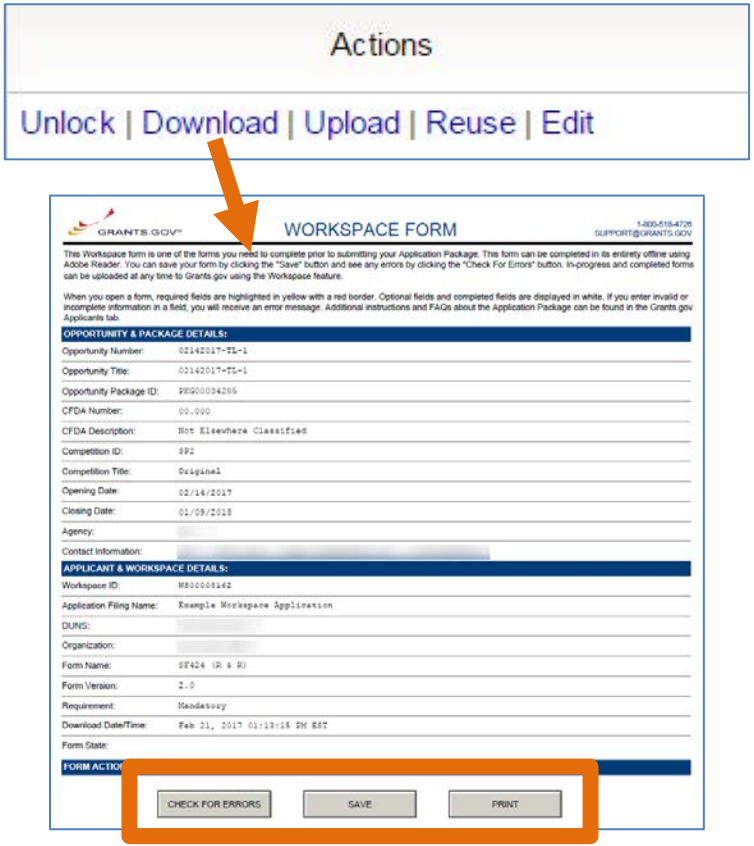
- Autosave occurs every 5 minutes
- Complete SF-424 first to pre-populate form fields and save time

COMPLETING ONLINE WEBFORMS



- **Save**: Stores your form data & attachments to Workspace
- **Check for Errors**: Form validation & field-level errors
- **Close**: Exits the online form

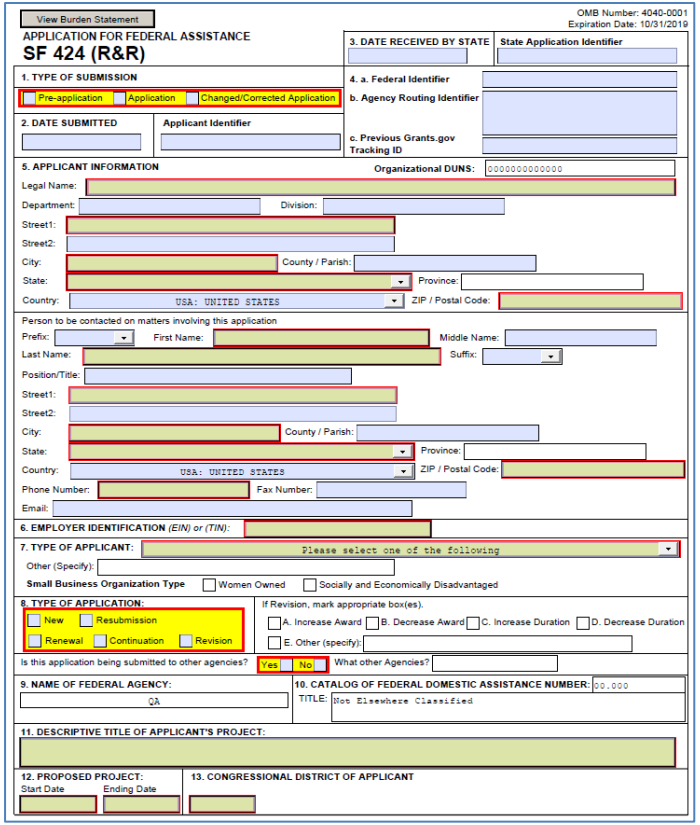
COMPLETING PDF FORMS



PDF Form Basics:

- Option to download PDF forms to complete in Adobe software
- Upload PDF forms to workspace
- Upon uploading, data shared between online webform and PDF versions of forms

COMPLETING PDF FORMS


View Burden Statement

OMB Number: 4040-0001
Expiration Date: 10/31/2019

APPLICATION FOR FEDERAL ASSISTANCE
SF 424 (R&R)

3. DATE RECEIVED BY STATE | State Application Identifier

1. TYPE OF SUBMISSION
Pre-application | Application | Changed/Corrected Application

4. a. Federal Identifier
b. Agency Routing Identifier
c. Previous Grants.gov Tracking ID

2. DATE SUBMITTED | Applicant Identifier

5. APPLICANT INFORMATION
Organizational DUNS: 000000000000
Legal Name:
Department: Division:
Street1:
Street2:
City: County / Parish:
State: Province:
Country: USA: UNITED STATES ZIP / Postal Code:

Person to be contacted on matters involving this application
Prefix: First Name: Middle Name:
Last Name: Suffix:
Position/Title:
Street1:
Street2:
City: County / Parish:
State: Province:
Country: USA: UNITED STATES ZIP / Postal Code:
Phone Number: Fax Number:
Email:

6. EMPLOYER IDENTIFICATION (EIN) or (TIN):

7. TYPE OF APPLICANT: Please select one of the following
Other (Specify):
Small Business Organization Type Women Owned Socially and Economically Disadvantaged

8. TYPE OF APPLICATION:
New | Resubmission | Renewal | Continuation | Revision
If Revision, mark appropriate box(es).
A. Increase Award | B. Decrease Award | C. Increase Duration | D. Decrease Duration
E. Other (specify):

Is this application being submitted to other agencies? Yes | No What other Agencies?

9. NAME OF FEDERAL AGENCY: QA
10. CATALOG OF FEDERAL DOMESTIC ASSISTANCE NUMBER: 00.000
TITLE: Not Elsewhere Classified

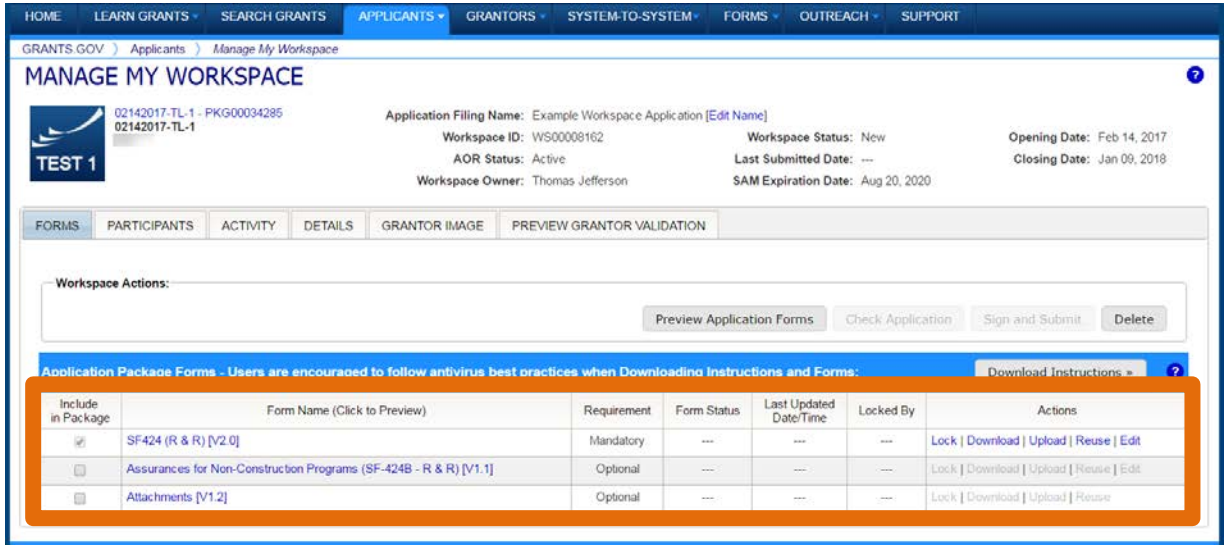
11. DESCRIPTIVE TITLE OF APPLICANT'S PROJECT:

12. PROPOSED PROJECT: Start Date | Ending Date
13. CONGRESSIONAL DISTRICT OF APPLICANT

PDF Form Basics:

- Tab through form fields
- Required fields have red border and yellow shading
- Hover mouse over form fields for help
- Error messages explain how to fill out form fields

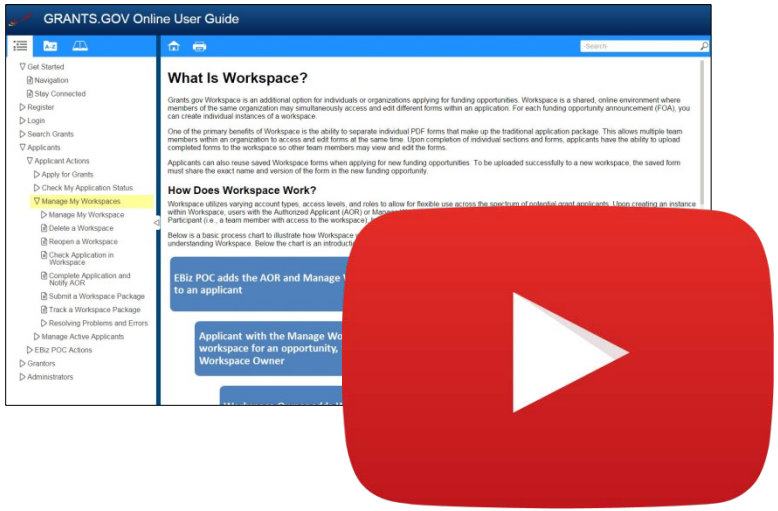
COMPLETING WORKSPACE FORMS



Workspace Features:

- Reuse past forms
- Cross-form validations
- Data retained for three years

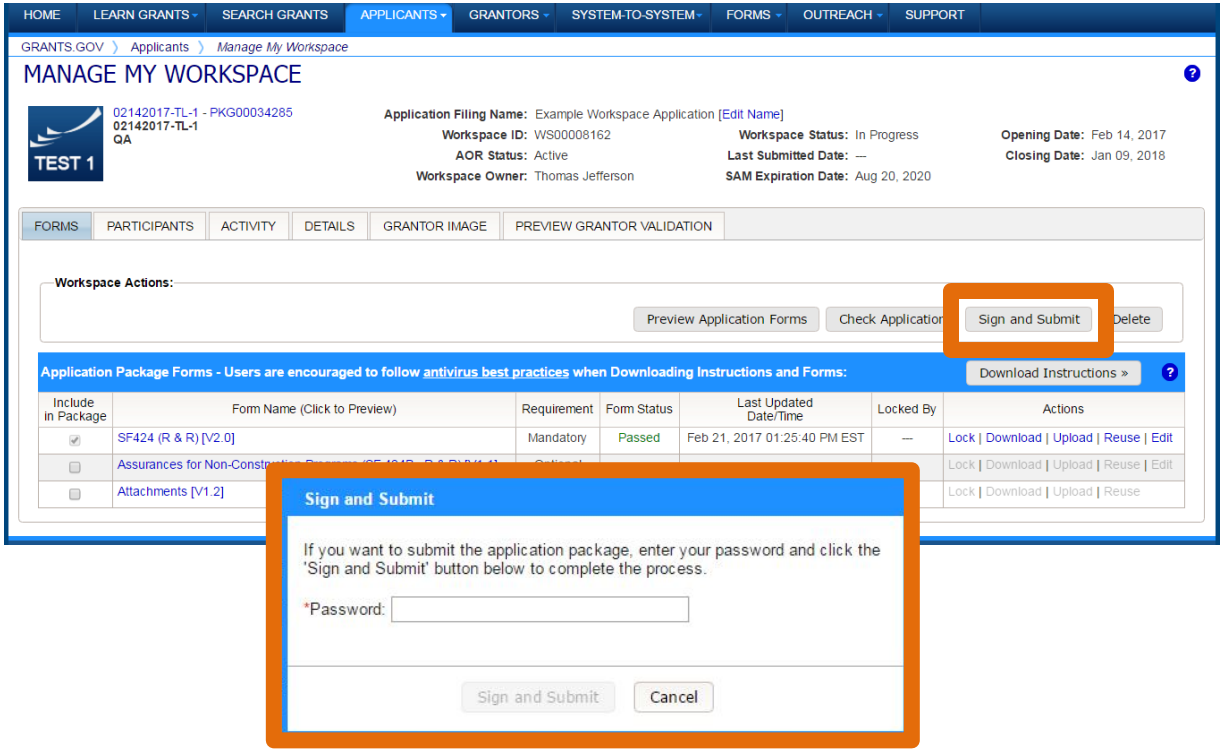
COMPLETING WORKSPACE FORMS



Resources

- Video: How to Complete Forms in a Workspace
- Video: Reuse a Saved Workspace Form
- Video: Locking and Unlocking Forms in a Workspace
- Online User Guide: Forms Tab—Managing Forms

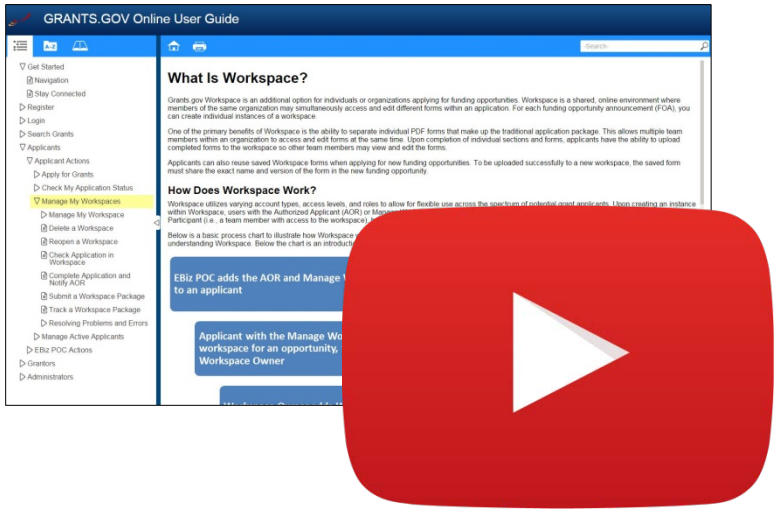
SUBMITTING VIA WORKSPACE



Process:

- Workspace Owner notifies AOR users
- AOR user submits
- Workspace Owner or AOR users may choose to Reopen Workspace

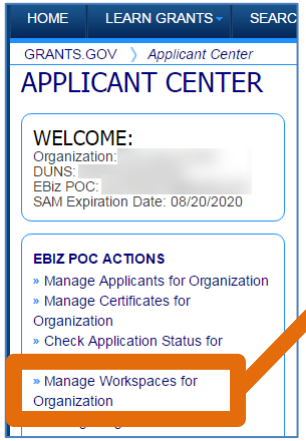
SUBMITTING VIA WORKSPACE



Resources

- [Video: How to Submit an Application in Workspace]
- [Video: Reopen a Workspace for Additional Edits]
- [Online User Guide: Check Application in Workspace]
- [Online User Guide: Submit a Workspace Package]

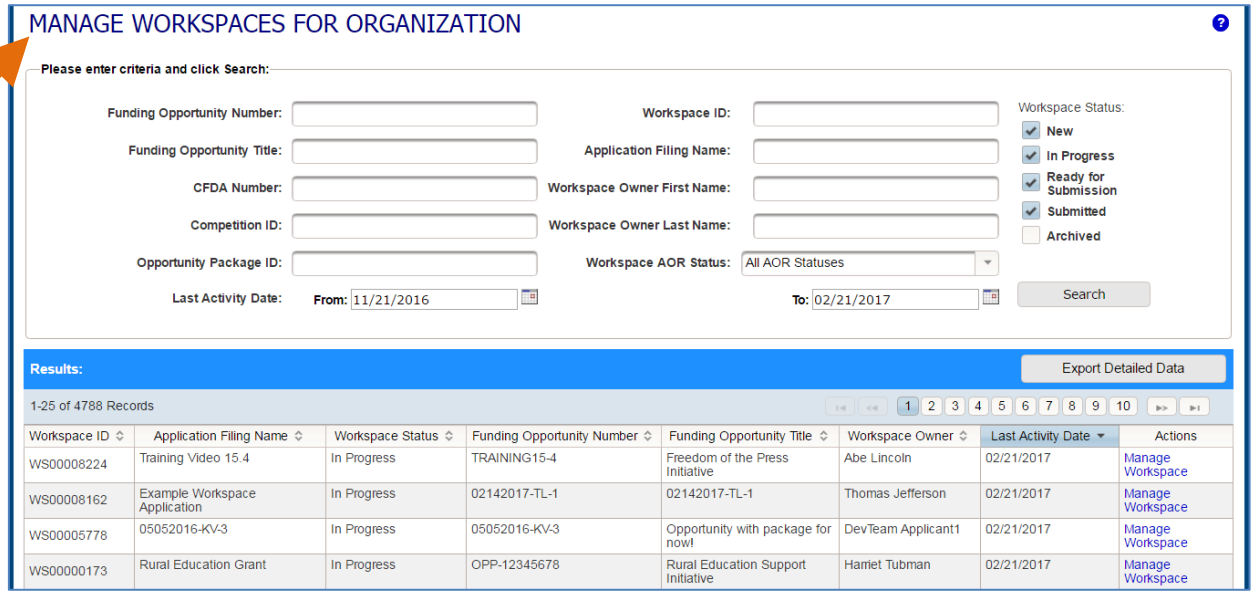
EBIZ POC ACTIONS



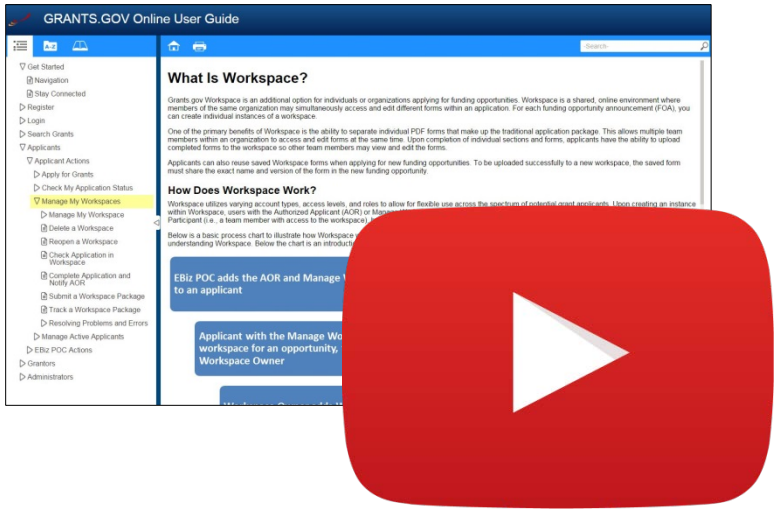
Key Actions

- EBiz POC performs workspace actions at organization level
- EBiz POC cannot submit a workspace

Notes: AOR with MPIN and Expanded AOR can also perform EBiz POC actions.



EBIZ POC ACTIONS



Resources

- [Online User Guide: Manage Access to Workspace for Organization]
- [Online User Guide: Manage Workspaces for Organization]