Grants.gov Workspace Overview
Becoming a Workspace Wizard
September 7, 2017

Agenda

- Objective and Benefits of Workspace

- Retire Legacy PDF Application Package

- Live-Demonstration of Workspace

- Recent Changes from June 2017

- Upcoming Changes in November 2017

- Questions and Feedback

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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

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Benefits of Workspace

- Multiple users can concurrently complete the application forms
- Reuse/Copy existing Workspace forms
- Upfront validation allows applicants to correct application errors prior to submission, which minimized the rejection rate
- Seamless integration between online webforms and offline PDF forms
- Collaborate with Users External to Your Organization
- Any 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.

Are you ready? If you have any questions or concerns, please contact us at community@grants.gov.

Live Demonstration of Workspace

Add Participants to the Workspace

Edit Forms Online or Download PDFs

Check Application

Complete Application & Notify AOR

Reopen the Workspace

Created	Forms Passed	Completed and Notified AOR	Submitted	Agency Received	Archived
MANAGE WORKSPACE ROLE	**WORKSPACE OWNER**	**ALL PARTICIPANTS**	**WORKSPACE OWNER**	**AOR**	**WORKSPACE OWNER**

Create a Workspace

Save Online Forms or Upload Completed PDFs

Submit the Completed Application

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

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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 articles:
  - "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 for Colleges and Universities" (3 Part Series)
  - https://blog.grants.gov/2017/06/06/grants-gov-workspace-for-colleges-and-universities-part-1-of-3/

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

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Upcoming Changes in November 2017

- Workspace Enhancements
  - Reuse/Copy across form versions
  - Streamline Workspace creation
- Subscription Management
  - View and Manage subscriptions
  - New subscription types: News and Saved Searches
  - One-Click Subscribe to Opportunity
  - Requires Grants.gov account/login
- Streamline Account Creation & Login
- New Forms Status Report for In Progress Forms

Grants.gov Helpdesk Support

- If you have any issues or questions while you are using Workspace to complete your application, please contact the Grants.gov Support Center at support@grants.gov or call 1-800-518-4726

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Feedback

- If you have general questions, feedback or concerns about workspace functionality or user-based suggestions and/or requirements, for transformation efforts, please email community@grants.gov.

Connect with Grants.gov

- Stay connected, with Grants.gov, to find out more about what's coming; new and interactive training opportunities; and, updated resources to assist with "Find, Apply and Succeed" objectives.

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Video tutorials on YouTube

Subscribe to our blog:
Blog.Grants.gov

Bookmark our Online User Guide

Email Us:
Community@grants.gov

GRANTS.GOV WORKSPACE OVERVIEW
SUPPLEMENT

FOR RELEASE 16.0

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OVERVIEW

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

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WHAT IS WORKSPACE?

The online space where you work on your grant application

Workspace is a **shared, online environment** where members of a grant team may simultaneously access and fill out forms within an application.

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WHAT IS WORKSPACE?

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

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**

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WHAT IS WORKSPACE?

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

Key Actions:

- Fill out webforms (*if available*)

- Lock/Unlock forms

- Download/Upload PDF forms

- Reuse forms

WHAT IS WORKSPACE?
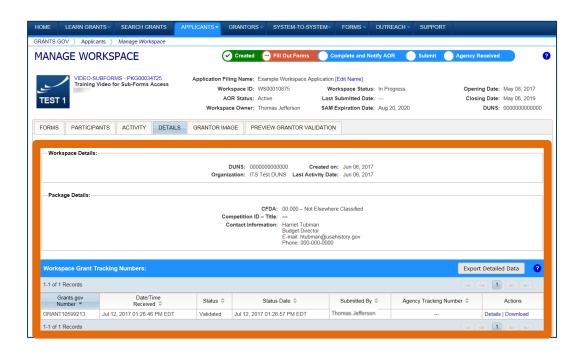

The **Participants** tab lists the members, or "Participants," of a workspace who work as a team to complete the required forms for a federal grant.

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WHAT IS WORKSPACE?

The **Activity** tab lists the actions that Participants have taken within the workspace.
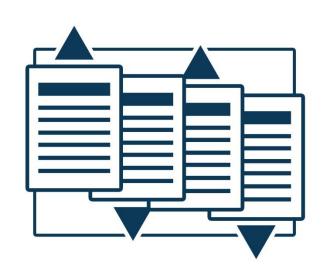
WHAT IS WORKSPACE?

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.

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WHY USE WORKSPACE?

2

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

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WHY USE WORKSPACE?

3

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

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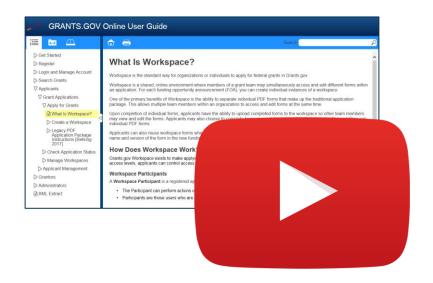
WHY USE WORKSPACE?

4

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

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WHY USE WORKSPACE?

Resources

- **Video: Introducing Workspace Functionality**

- **Workspace Overview Page on Grants.gov**

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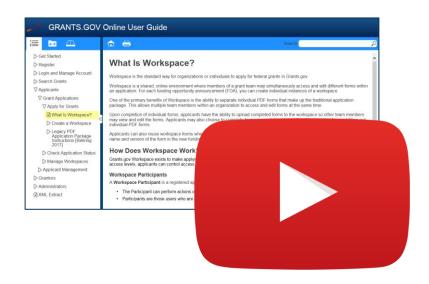
CREATING A WORKSPACE

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

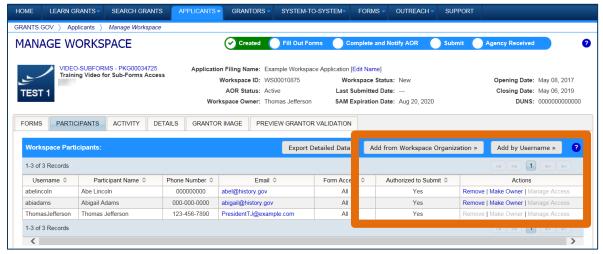If the application package is compatible with Workspace, you will be able to create a new workspace.

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CREATING A WORKSPACE

Resources

- **Video: How to Create a Workspace**

- **Online User Guide: Create a Workspace**

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MANAGING PARTICIPANTS & ROLES

Adding Participants:

Click the **Add from Workspace Organization** button to search for a user within your organization

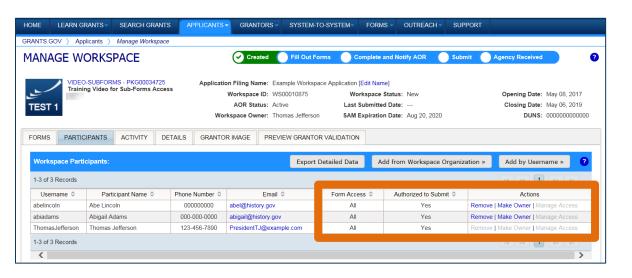Click the **Add by Username** button to add a user from outside your organization

Removing Participants:

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

Reassigning Ownership:
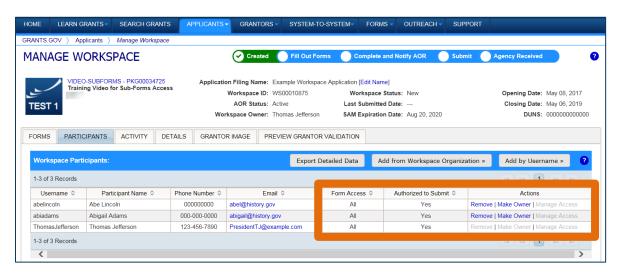
Click the **Make Owner** link in the Actions column

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
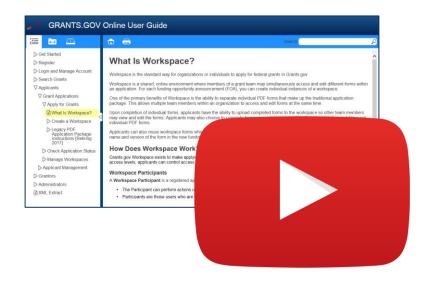- AOR with standard access
- AOR with expanded access*
- Form Level

*__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:

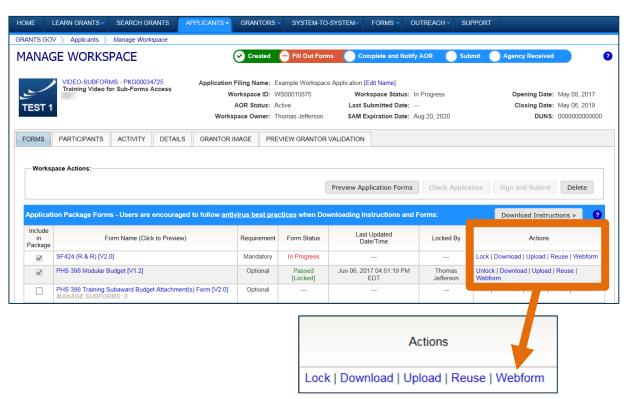# MANAGING PARTICIPANTS & ROLES

Resources

- **Video: Understanding User Roles and Access in Workspace**

- **Video: How to Add Participants to a Workspace**

- **Video: How Do I Add Participants Who Are Outside My Org?**

- **Online User Guide: Manage Participants in a Workspace**

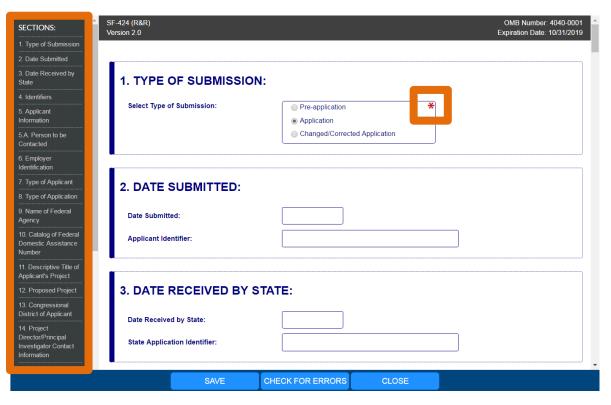# COMPLETING WORKSPACE FORMS

Key Actions:

- Fill out webforms (*if available*)

- Download and Upload PDF forms

- Lock/Unlock forms
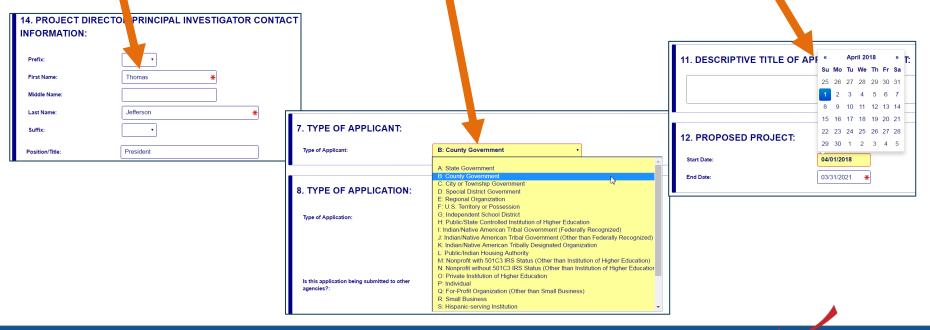
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COMPLETING WEBFORMS

Webform Basics:

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

COMPLETING WEBFORMS
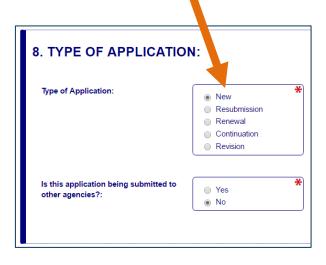
Filling Out Fields:

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

14. PROJECT DIRECTOR/PRINCIPAL INVESTIGATOR CONTACT INFORMATION:

Prefix:	▼
First Name:	Thomas ✱
Middle Name:	
Last Name:	Jefferson ✱
Suffix:	▼
Position/Title:	President

7. TYPE OF APPLICANT:

Type of Applicant: | B: County Government ▼ |

- A: State Government
- B: County Government
- C: City or Township Government
- D: Special District Government
- E: Regional Organization
- F: U.S. Territory or Possession
- G: Independent School District
- H: Public/State Controlled Institution of Higher Education
- I: Indian/Native American Tribal Government (Federally Recognized)
- J: Indian/Native American Tribal Government (Other than Federally Recognized)
- K: Indian/Native American Tribally Designated Organization
- L: Public/Indian Housing Authority
- M: Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)
- N: Nonprofit without 501C3 IRS Status (Other than Institution of Higher Education)
- O: Private Institution of Higher Education
- P: Individual
- Q: For-Profit Organization (Other than Small Business)
- R: Small Business
- S: Hispanic-serving Institution

8. TYPE OF APPLICATION:

Type of Application:

Is this application being submitted to other agencies?:

11. DESCRIPTIVE TITLE OF APP

«	April 2018	»

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

12. PROPOSED PROJECT:

Start Date: | 04/01/2018 |

End Date: | 03/31/2021 ✱ |

COMPLETING WEBFORMS

Filling Out Fields:

- Radio buttons (multiple choice)

- Attach files within online form

COMPLETING WEBFORMS

More Features:

- Hover mouse over form fields for help

- Error messages explain how to fill out form fields

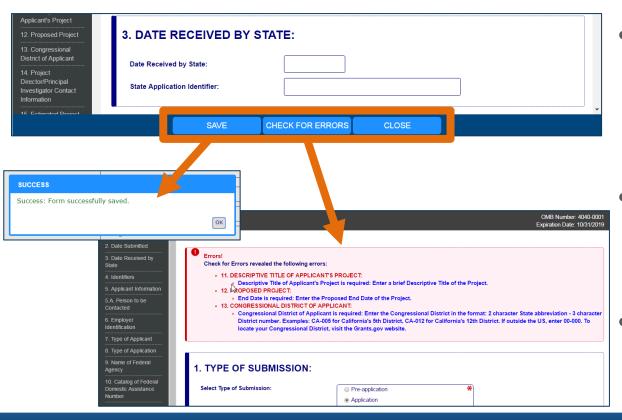# COMPLETING WEBFORMS

More Features:

- Autosave occurs every 5 minutes

- Complete SF-424 first to pre-populate form fields and save time

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COMPLETING WEBFORMS

- **Save**: Stores your form data & attachments to Workspace

- **Check for Errors**: Form validation & field-level errors

- **Close**: Exits the online form

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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 and PDF versions of forms

COMPLETING PDF FORMS

PDF Form Basics:

- Tab through form fields

- Required fields have red border and yellow shading

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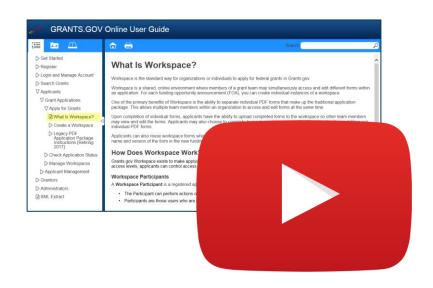
- Error messages explain how to fill out form fields

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COMPLETING WORKSPACE FORMS

Workspace Features:

- Reuse past forms

- Cross-form validations

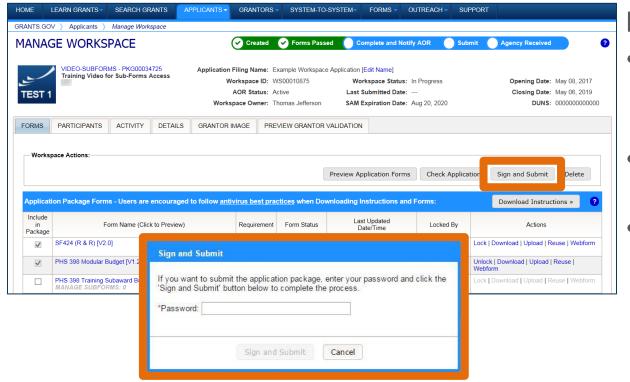- Data retained for three years

COMPLETING WORKSPACE FORMS

Resources

- **Video: How to Complete Forms in a Workspace**

- **Video: Reuse a Saved Workspace Form**

- **Online User Guide: Forms Tab—Managing Forms**
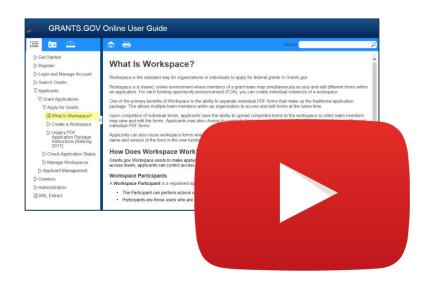
SUBMITTING VIA WORKSPACE

Process:

- Workspace Owner notifies users with AOR role
- User with AOR role submits
- Workspace Owner or user with AOR role 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**

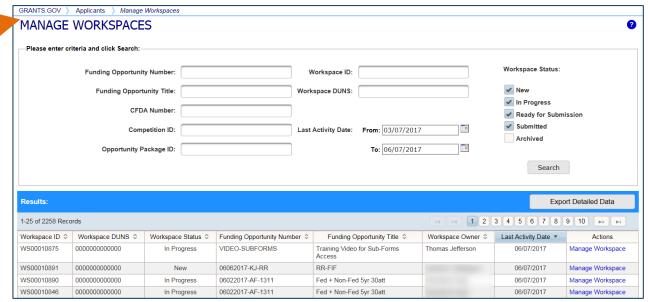- **Online User Guide: Submit a Workspace Package**
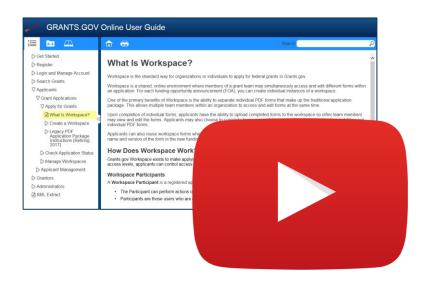
ORGANIZATION MANAGEMENT

Key Actions

- EBiz POC and users with AOR with MPIN can perform workspace actions at organization level
- EBiz POC cannot create or submit a workspace

ORGANIZATION MANAGEMENT

Resources

- **Online User Guide: Manage Applicants**

- **Online User Guide: Manage Workspaces**

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