Grants.gov Workspace

OSP AWARENESS NOVEMBER 8, 2017

Objectives for today

- Overview of Grants.gov Workspace
- Retirement of Legacy PDF Application Package
- How to Register in Grants.gov
- Review 'Roles' in Workspace
- Live-Demonstration of Workspace
- How to work, edit, save and print your application
- Final thoughts and Questions

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 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
- Opportunity Package changes 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.

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/



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

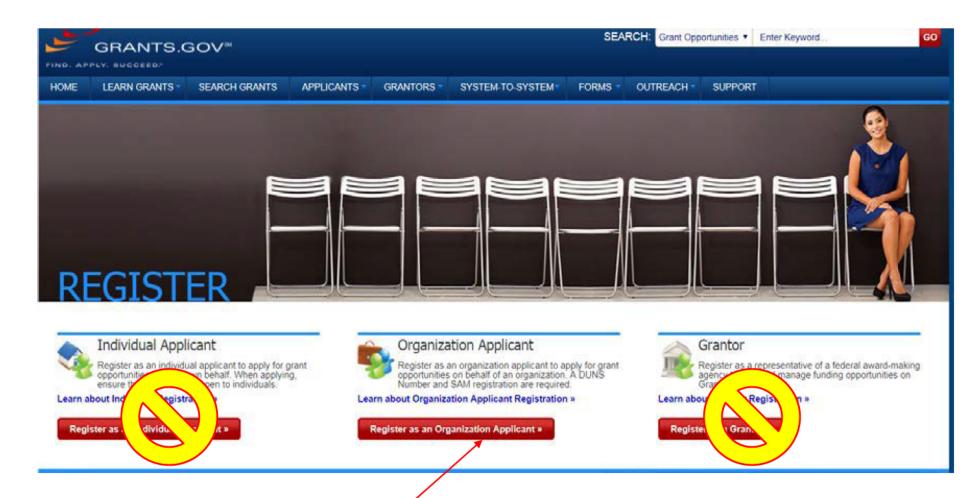


Grants.gov Workspace Registration

To register in Grants.gov Workspace, go to the following URL: https://www.grants.gov/web/grants/register.html

Register as an "Organization Applicant" as indicated on the next slide.

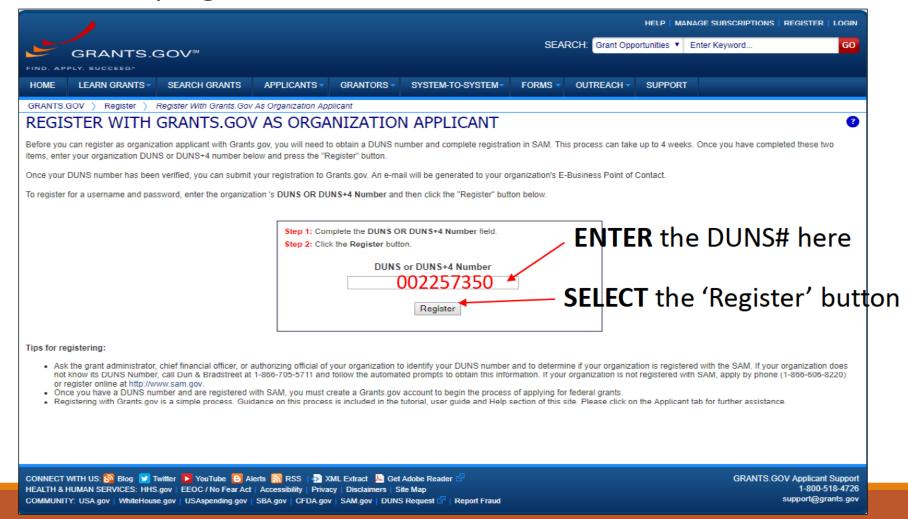
Grants.gov Registration



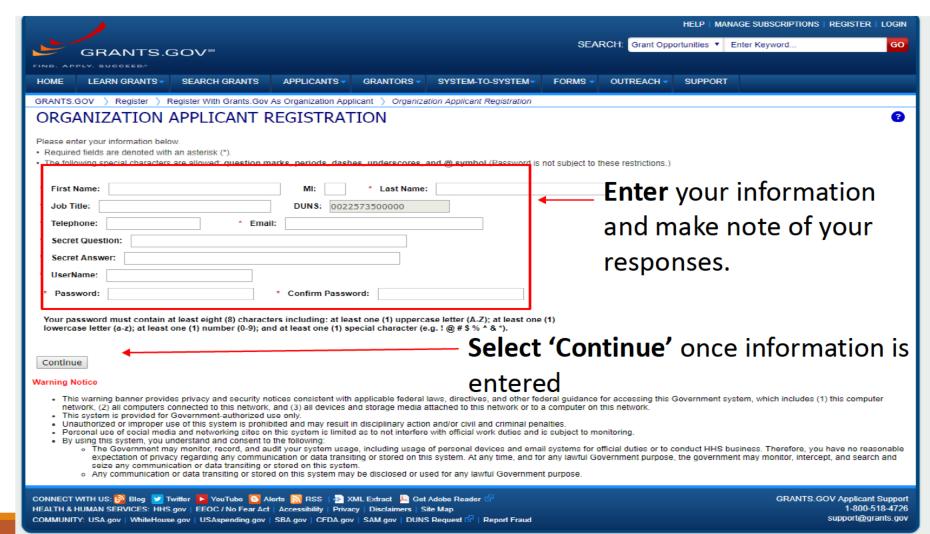
Select 'Register as an Organization Applicant'

Enter SU DUNS# as indicated below

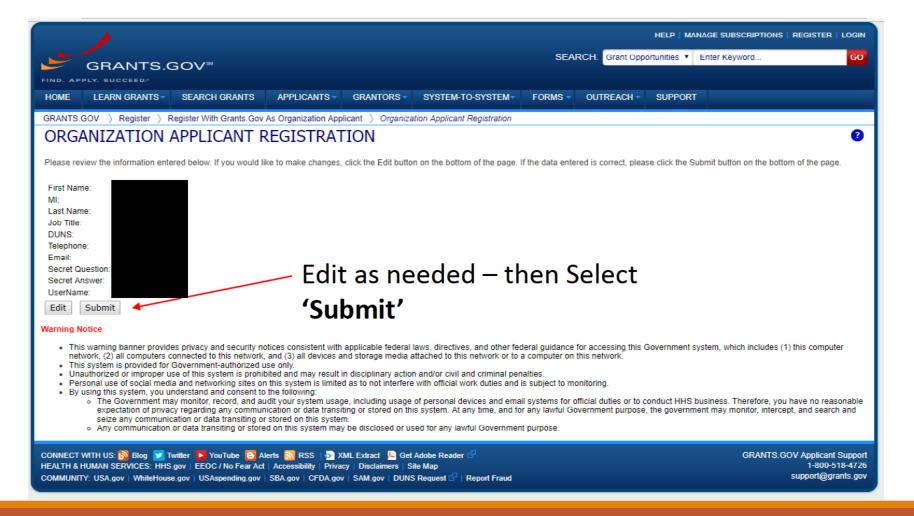
You **<u>Do Not</u>** need to register for a DUNS# or in SAM, as SU is already registered in both. **SU DUNS is 002257350**.

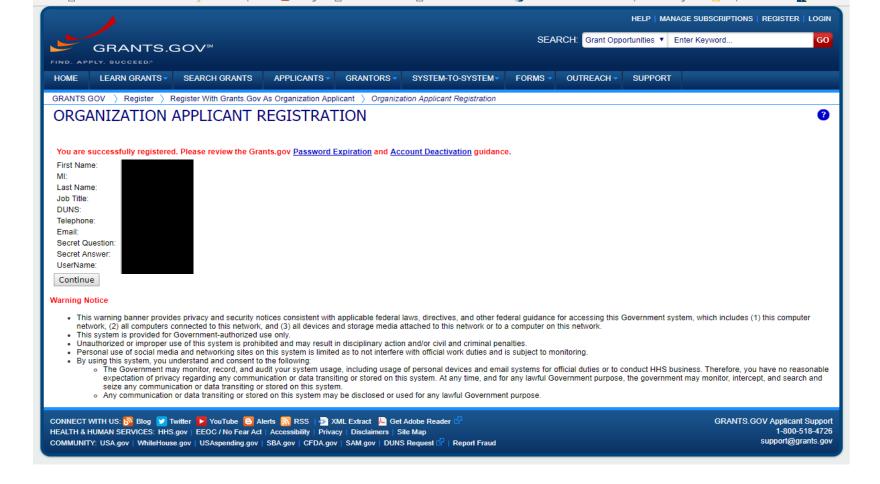


Complete Organization Applicant Registration



Complete Organization Applicant Registration





The above confirmation screen will be displayed and an email acknowledgement of your registration will be sent to the Office of Sponsored Programs. This email notifies OSP that you are requesting a grants.gov role be assigned.

OSP Next Steps

Follow-up communication with OSP is recommended to confirm that your interest in applying for funding is known. Consider whether you want the "Manage Workspace" Role, or would prefer to be a "Workspace Participant".

In response to your request, OSP will assign you one of the following roles—

- 1. Manage the Workspace
- 2. Workspace Participant any Grants.gov user who has been added to a workspace to complete and edit forms.
- 3. Workspace Owner a participant with a Manage Workspace Role serves as "owner" of the workspace.

Once OSP has assigned you a role, you will now be ready to Login.

Live Demonstration of Workspace



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

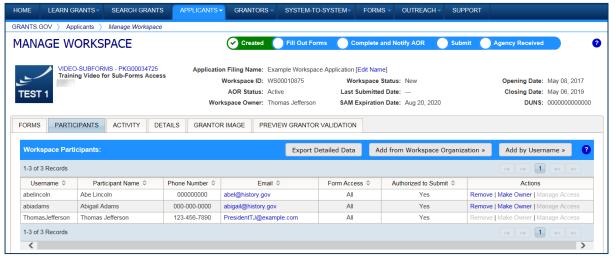
- Workspace Process and Roles Overview
- Creating a Workspace
- Managing Participants & Roles
- Completing Online and Offline Workspace Forms
- Submitting via Workspace



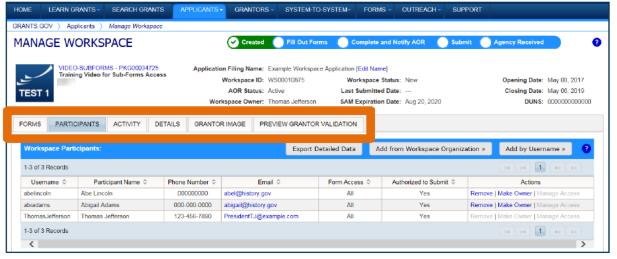
Final Thoughts

- Remember to register in Grants.gov!
- •Which 'role' best suits your needs? (Manage Workspace, or Participant)
- Notify OSP of your intentions to apply as early as possible
- Remember that Workspace is new and like all new systems, can still have issues.
- Follow OSP's Service Guidelines to ensure a stress-free submission.
- Review the remaining slides later, as these are screen-shots of a live demo
- **-QUESTIONS??**

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.

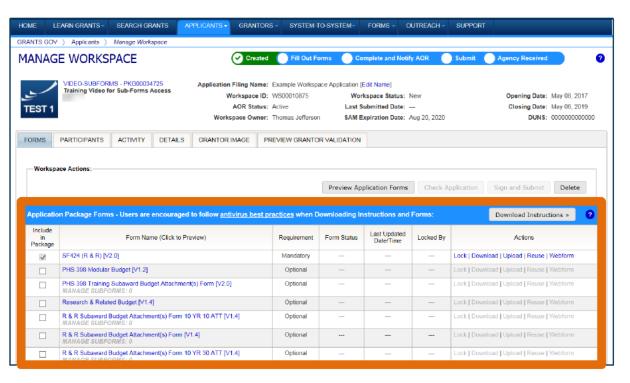


The top section of each workspace contains key information about the application status.

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**



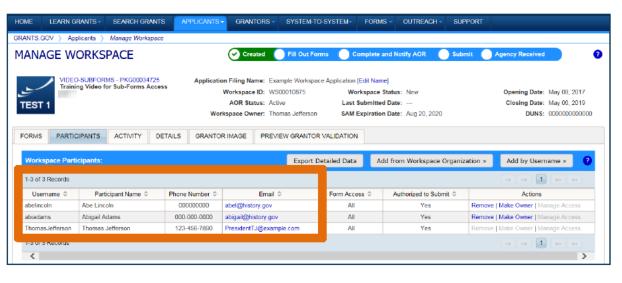


The **Forms** tab contains individual forms that are part of the workspace application package.

Key Actions:

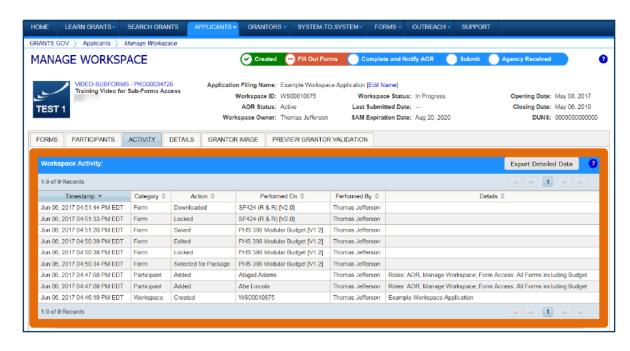
- Fill out webforms (if available)
- Lock/Unlock forms
- Download/Upload PDF forms
- Reuse forms



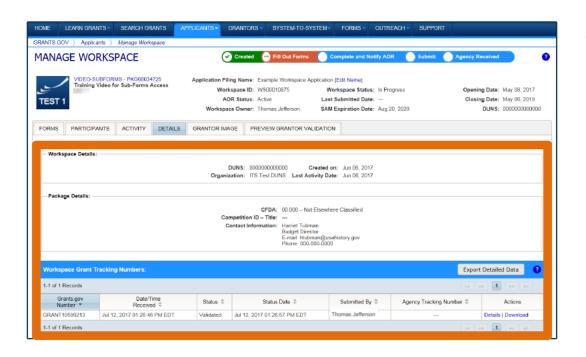


The **Participants** tab lists the members, or "Participants," of a workspace who work as a team to complete the required forms for a federal grant.





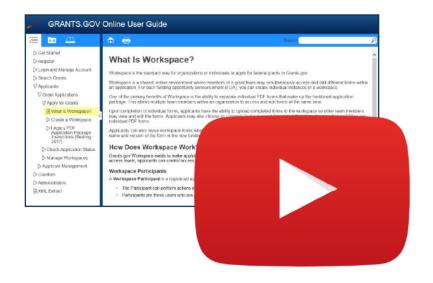
The **Activity** tab lists the actions that Participants have taken within the workspace.



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



WHY USE WORKSPACE?



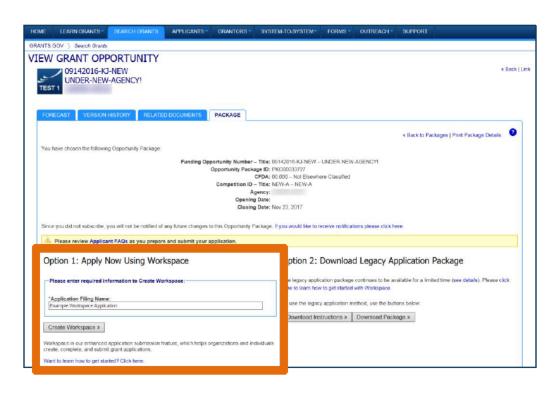
Resources

Video: Introducing
 Workspace Functionality

Workspace Overview
 Page on Grants.gov



CREATING A WORKSPACE

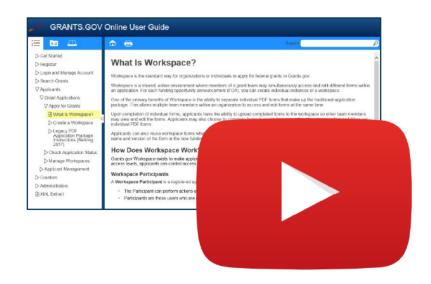


After logging in, create a workspace by visiting the View Grant Opportunity page and clicking the Package tab.

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



CREATING A WORKSPACE

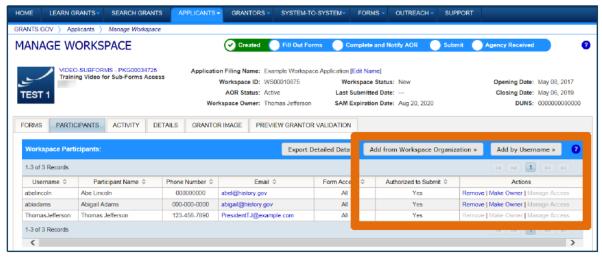


Resources

 Video: How to Create a Workspace

 Online User Guide: Create a Workspace





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

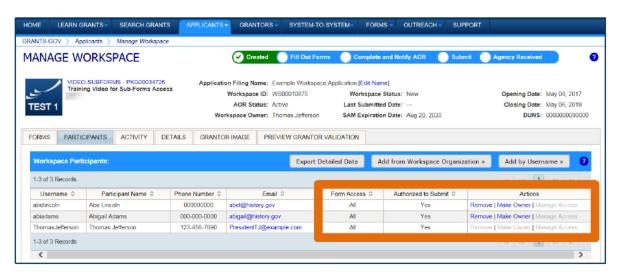
Removing Participants:

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

Reassigning Ownership:

Click the **Make Owner** link in the Actions column





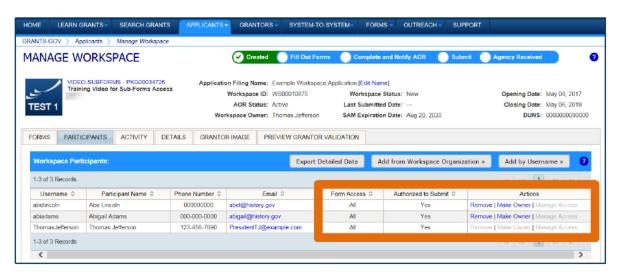
Roles:

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

Account Types:

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





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.

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







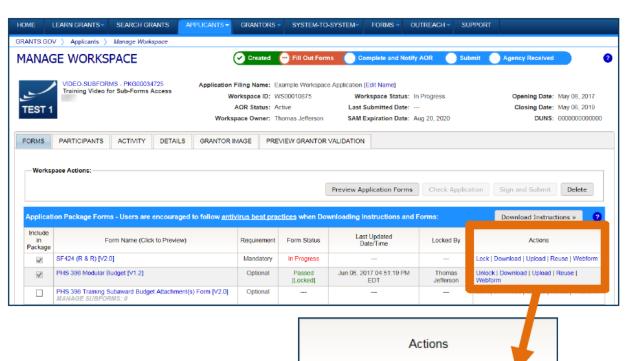
Resources

- 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



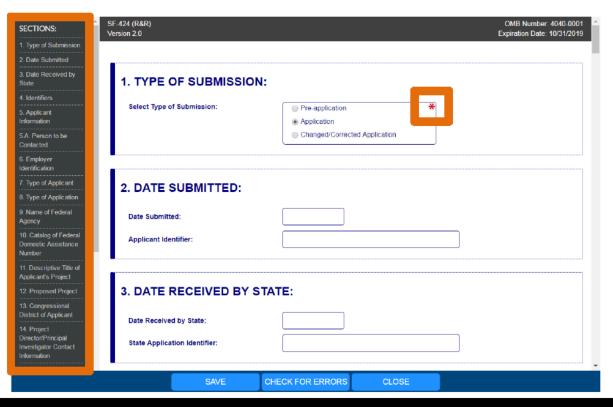
COMPLETING WORKSPACE FORMS

Lock | Download | Upload | Reuse | Webform



Key Actions:

- Fill out webforms (if available)
- Download and Upload PDF forms
- Lock/Unlock forms



Webform Basics:

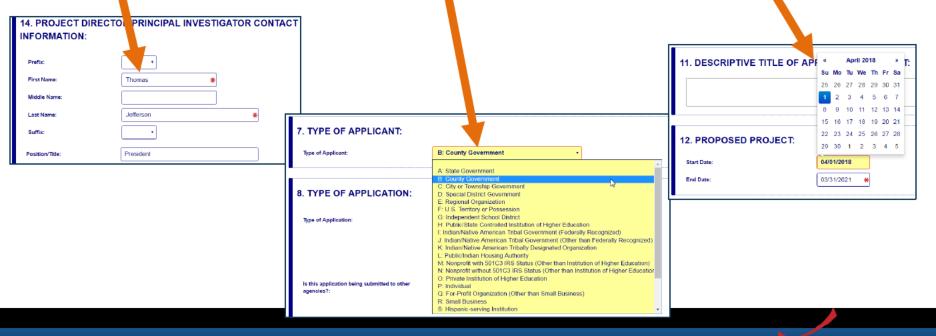
- Complete online forms in web browser
- Navigate by clicking sections
- Tab through form fields
- Required fields have red asterisk



Filling Out Fields:

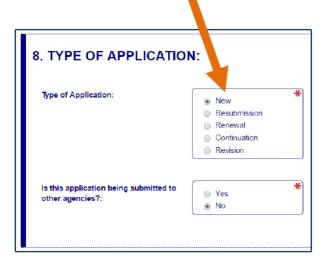
Open text entry

- Drop-down menu
- Dates/calendar

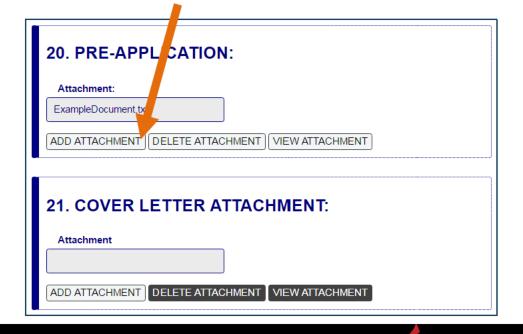


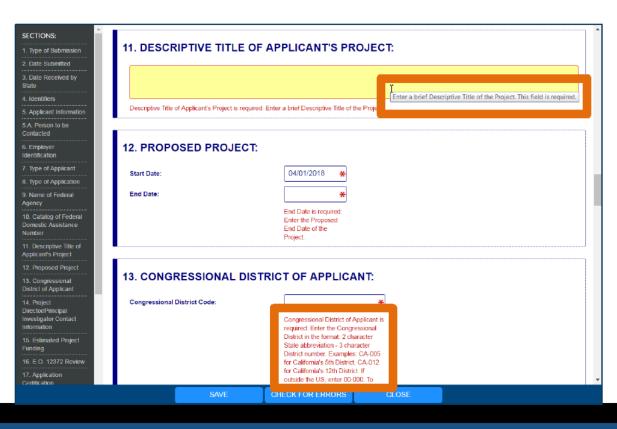
Filling Out Fields:

 Radio buttons (multiple choice)



Attach files within online form

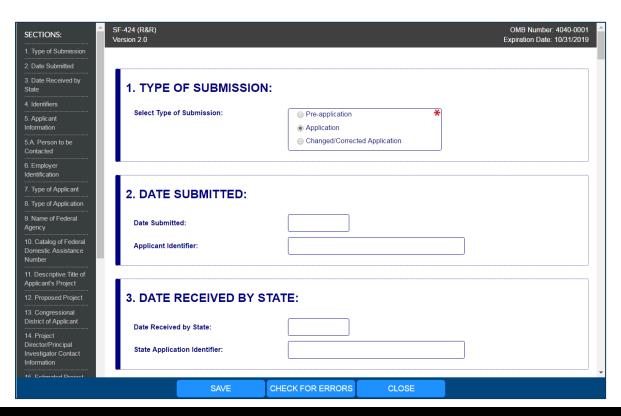




More Features:

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

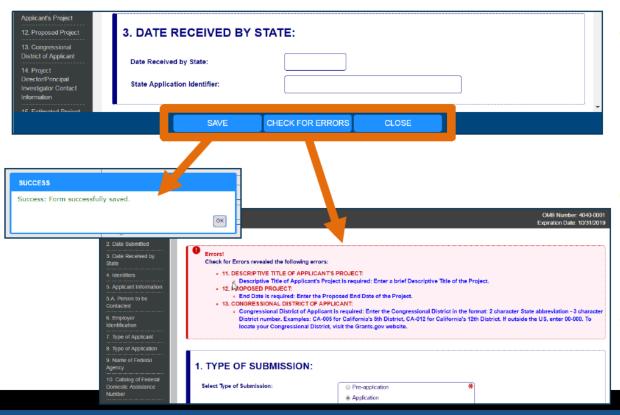




More Features:

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





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



COMPLETING PDF FORMS

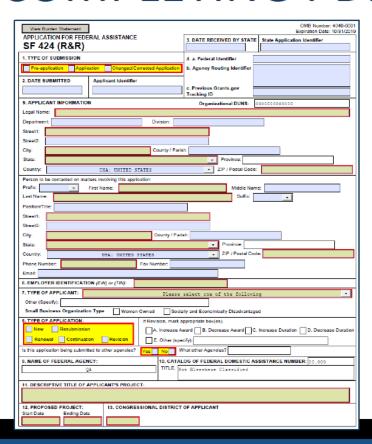


PDF Form Basics:

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



COMPLETING PDF FORMS

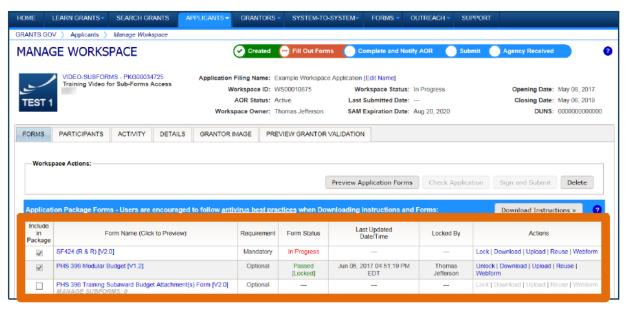


PDF Form Basics:

- 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



COMPLETING WORKSPACE FORMS

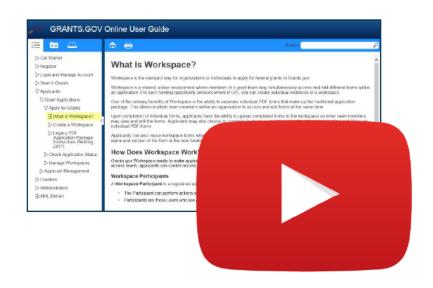


Workspace Features:

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



COMPLETING WORKSPACE FORMS



Resources

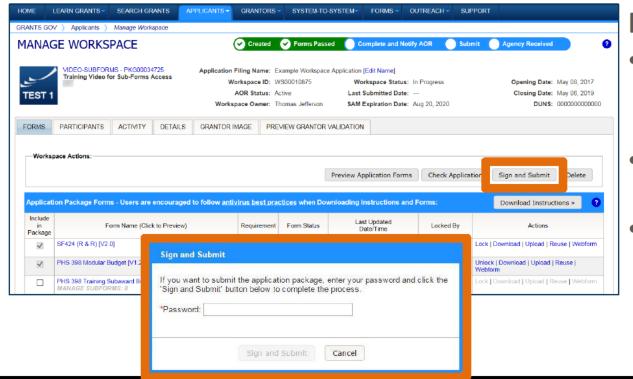
Video: How to Complete
 Forms in a Workspace

 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



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