

**Beginning Grant Management
Grant Stage 1: Application Preparation
User Guide**

The Beginning Grant Management user guide is intended to assist users with the beginning the the lifecycle stages of grants management. This user guide will provide instructions on how to navigate through creating a project, select the grant funding source, and move to the the first grant stage-application preparation.

Sections in this user guide:

[Create a Project](#)

[Locating the grant for your project](#)

[Assigning Grants to a Project](#)

[Grant Stage–Application Preparation](#)

[Create a project](#)

There are two methods you can use for create project in eCivis. The first option is to create projects representing the real community or organizational need you are trying to support with grants such as an afterschool program, construction project, or general area of funding.

The other method is to create a project that represents the grant you are receiving. For instance, you could name a project *Justice Assistance Grants* and attach each subsequent year of funding that you receive from this program.

Once you've determined which method you will use, hover over the Grants Management tab and from the drop down menu select "Create Project":



Complete the Create Project form. Required fields are marked with a red asterisk.

*Note that available departments will only display those that are assigned to the user. Similarly, the list of users that can be designated as the Project Lead must be assigned to the department selected.

Create Project

Bold * items are required.

Complete Project Information

Department*: Administration

Project Name*: WIC-PEER COUNSELOR

Project Lead*: Ryan Baird

Project Type: Non-Construction Construction

Internal Project ID: HCAA027572

Internal Project Name: WIC-PEER COUNSELOR

Project Summary*: n/a
1497 Characters Left

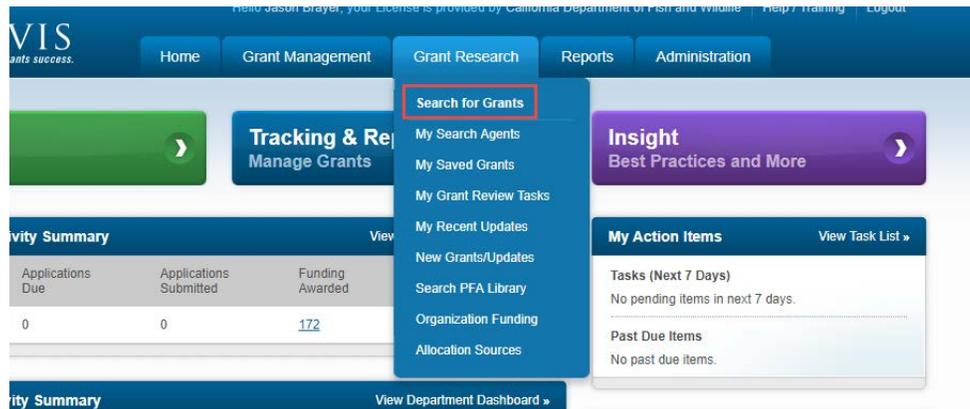
Save > Cancel >

Once you've created your project, you will need to locate the Grant(s) that fund your project. The Grant Research tab only contains grants held in the eCivis database of Federal, State, local and foundation grants.

If you are a recipient of an ISA or pass through funding from another State Agency, please go to the user guide titled "When to Create Organization Funding".

[Locating the grant for your project](#)

To locate the grant for your project, go to the Grant Research tab and click on Search for Grants:



In the Keywords field, enter in at least one keyword specific to the grant you want to find. It is recommended to use no more than three keywords. Keywords can include words that might appear in the title. For example: if you know the title was previously Hazard Mitigation Grant Program, search HMGP or "Hazard Mitigation."

Other identifiers you can use as keywords are the CFDA number, Federal Opportunity Number, locations, or state grant ID.

There are also ways to limit or join a set of words and related phrases. You can find this set of tips by clicking on the question mark within the Search by Keyword box.

For additional tips on how to use the search tools, there is a video that can be activated by clicking on the question mark in the top right corner of the page.

Search For Grants

Search by Keyword

See help popup for advanced search syntax. [?](#)

Search Agent My Search Agents »

Run an existing search agent. [?](#)

AND / OR

Additional Search Criteria + Open

[Find Grants Now! >](#)

You can also use the “Additional Search Criteria” to specify the grant type, eligibility of applicants, due dates, and matching requirements. Click on the “+Open” button to view the Additional Search Criteria features:

Additional Search Criteria + Open

[Find Grants Now! >](#)

Grant Type and Agency

All
 Specify Type
 Include Organizational Funding
 Include Archived Grants

Type:

- Federal
- Foundation
- Texas
- Organization - County/Regional
- Organization - Federal
- Organization - Foundation
- Organization - Other

Agency:

- All
- TX Ark-Tex Council of Governments
- TX Coastal Bend Council of Governments
- TX Commission on Environmental Quality
- TX Council for Developmental Disabilities
- TX Department of Aging
- TX Department of Agriculture

You can sort the search results by clicking on the column headers. You can also modify your search results when adding Filters, located on the left side of the page. If you plan to use the same keywords and search criteria in the future, you can save your search as a Search Agent by clicking on the + icon in the Search Agent box. Click into the Grant Title to view the grant details. Previously viewed grants will have an italicized Grant Title.

Search Results

Search by Keyword

See help popup for advanced search syntax. [?](#)

Search Agent My Search Agents >

Run an existing search agent. [?](#)

Existing Search Agents +

Filter

- Categories >
- Grant Type and Agency >
- Other Criteria >

Search Results Results 1 - 25 of 99 (0.008 seconds) 1 2 3 4 >

Score	GN Code	Grant Title	Agency	Actual Funds	Due Date
100.00	FD3886	KaBOOM!: Creative Play Grants: Imagination Playground - FY 2018	FD Foundation	Unspecified	Rolling
99.79	FD11593	GameTime: Playground Grants - FY 2018	FD	Unspecified	11/21/2018

Assigning Grants to a Project

Now that you have found the right grant, you will want to save it to your project.

To save a grant to an existing project, click into the Grant Title and click on “Save/Assign”:

FD3886 KaBOOM!: Creative Play Grants: Imagination Playground - FY 2018

Save / Assign
Email Grant
Grant Usage

Summary Eligibility/Application Financial Contact/Files

Type:	Foundation	Next Due:	Rolling
Agency:	FD Foundation	Solicitation Date:	Rolling
Office:	KaBOOM!		
Multipart Grant:	No	Match Required:	No
		Actual Funds:	Unspecified

Summary:

Click on “Assign grant to an existing project”:

Save/Assign Grant x

Grant: FD3886 KaBOOM!: Creative Play Grants: Imagination Playground - FY 2018

- Assign grant to an existing project
- Assign grant to a new project
- Save as unassigned

Cancel >

Next, select the Department of where the project is assigned. This will generate the projects available in the Projects field.

Assign Grant to Existing Project

1. Select Department & Project

Grant: FD3886 KaBOOM!: Creative Play Grants: Imagination Playground - FY 2018

Department *: NOAA Section 6

Project *: Select Project

- Select Project
- White Abalone Restoration Stocking (Parent)
- White Abalone Restoration Stocking - 360016570645...
- White Abalone Restoration Stocking - 360089060100...
- White Abalone Restoration Stocking - 360089060100...

2. Select Funding Status

Click on “Yes” for the application requirement and set the Grant Status as “Under Consideration”:

Assign Grant to Existing Project

2. Select Funding Status

Is an application required for this grant? *: Yes No

3. Select Grant Status

Grant Status *: Under Consideration

4. Complete Status Form

Attach any pertaining documentation and leave any notes for the other team members. Click “Save” and this will attach the grant to your project. You will be led back to the Grant Details page. The grant and any other grants that have been saved to the project will appear on the front page of the **Project Dashboard**:

Project Dashboard: Demo Playground Project

Department: Non-Traditional Section 6 Project Options

Overview Documents Grant Lifecycle Goals & Metrics Budgets Contracts & Accounts Spending History

Active Grants 🔍 📌

FD3886: FY2018 Stage: Under Consideration Application Due Date: Rolling

FD3886 KaBOOM!: Creative Play Grants: Imagination Playground - FY 2018

Project Team 👤 +

[R. Baird \(Lead\)](#) asd

[J. Brayer](#) Director of Im...

Available Actions

- I will apply for this grant
- I am ready to submit my application

If you were awarded a grant or are interested in a grant that is not in the Grants Network Research Database you can request to add the grant by emailing eCivis at support@ecivis.com and provide the following information:

- name of grant,
- funding description,
- funding agency,
- CDFA number- must include if it's a Federal grant
- projected amount of grant
- project summary.

If you are a recipient of pass-through funding from another State agency- please review the “Create Organization Funding” user guide for instructions.

Grant Stage – Application Preparation

To move the grant from Under Consideration to Application Preparation, select “I will apply for this grant” on the project dashboard.

The screenshot displays a dashboard with several tabs: Overview, Documents, Grant Lifecycle, Goals & Metrics, Budgets, and Contr. Under the 'Active Grants' section, the grant 'FD3886: FY2018' is shown with a 'Stage: Under Consideration' label and an 'Application Due Date: Rolling'. Below this, the grant title 'FD3886 KaBOOM!: Creative Play Grants: Imagination Playground - FY 2018' is visible. The 'Available Actions' section contains a list of radio button options, with the first option, 'I will apply for this grant', highlighted by a red box.

Overview Documents Grant Lifecycle Goals & Metrics Budgets Contr

Active Grants

FD3886: FY2018 Stage: Under Consideration Application Due Date: Rolling

FD3886 KaBOOM!: Creative Play Grants: Imagination Playground - FY 2018

Available Actions

- I will apply for this grant
- I am ready to submit my application
- I will not apply for this grant
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant
- I would like to create/manage a program for solicitation for this grant

Complete all required fields, marked with a red asterisk:

Grant Status - Application Preparation

Complete Status Form

Grant: FD3886 KaBOOM!: Creative Play Grants: Imagination Playground - FY 2018

Application Due * :

Reminder:

Assigned To * : ▼

Projected Award \$ * :

Match Required * : NO

Match Type: ▼

Cash Match \$* :

In-Kind Value:

Notes:

500 Characters Left

Upload Files

Attach Files:

Upload any documents associate with this stage. Common documents are Executive Approvals, Letter of Intent, Initial Project Design, or a draft application. eCivis is the eFile of record for State of Arizona agencies grants management and should include all pertinent documentation submitted to the Grantor.

Note: At this stage there is a task, will automatically triggered called Grant Application to Submit. Within a project, you can assign two different types of tasks: Simple and Advanced.

- **Simple-** allows you to assign a basic task with a due date
- **Advanced-** provides more functionalities such as approval sequences, frequent reminders, and required tasks.

Refer to Task Functionality manual for instruction on how to complete a task.