

eCivis REFERENCE GUIDE

Grant Pursuance

1. Click on the green box on the left-hand side of the front page titled **Research/Find Grants**:
 - A user can also click on the blue tab at the top of that same page titled **Grant Research** and then click on **Search for Grants**.
2. In the **Search by Keyword** box, enter a keyword(s) related to user's project and press enter or click on the magnifying glass icon:
 - **Single word** searches will include other forms of the word e.g. user entered revitalization but eCivis will also search for revitalize, revitalizes, revitalized, etc.;
 - **Multiple words** not separated by a comma will be searched individually;
 - **Exact phrase match** will occur when a user places double quotes (“ ”) around a set of words;
 - Using **Boolean operators** (e.g. and, or, not, etc.) will result in more effective search results; and
 - An asterisk symbol (*) will perform a wild card search related to the keyword entered (e.g. searching for “micro*” would match “microbiology” and “microbial”).
3. Under the **Filter** area, click on **Other Criteria**:
 - Under **Eligibility**, select **State Government**;
 - Under **Application Due Date**, select the appropriate time frame (best results would be to choose **Next 12 Months**); and
 - Under **Matching**, default setting of **Include All** will search for both non-matching and match required grants.
4. If a user is pleased with the number of results and types of grants generated then save the criteria as a **Search Agent**, allowing the user to search for the same grants at a later time (and receive email updates as grants are added/updated that fit this criteria)
 - In the Search Agent box, click on the **Create Search Agent** icon;
 - A user will name this search accordingly along with enabling the **Send Search Agent Alert Email** capability by clicking that box; and
 - Click the **Save** button.

Project Creation

- From the eCivis homepage, under the blue **Grants Management** tab, click on **Create Project**:
- Select the appropriate **Department** from dropdown box (in most cases there will only be one offered to a user);
 - Chose a **Project Name**;
 - Select a **Project Lead** from the dropdown box (in most cases, it should be the user creating the project);
 - Create a short synopsis in the **Project Summary** box;
 - Click the **Save** button.

*Project creation can also be done after searching and finding a grant a user would like to pursue by clicking on the **Save/Assign Grant** box and following the above steps.

**A user can assign multiple grants to fund one project.

eCivis Reminders

1. **Bold *** items are required.
2. Include user initials when inputting any notes.