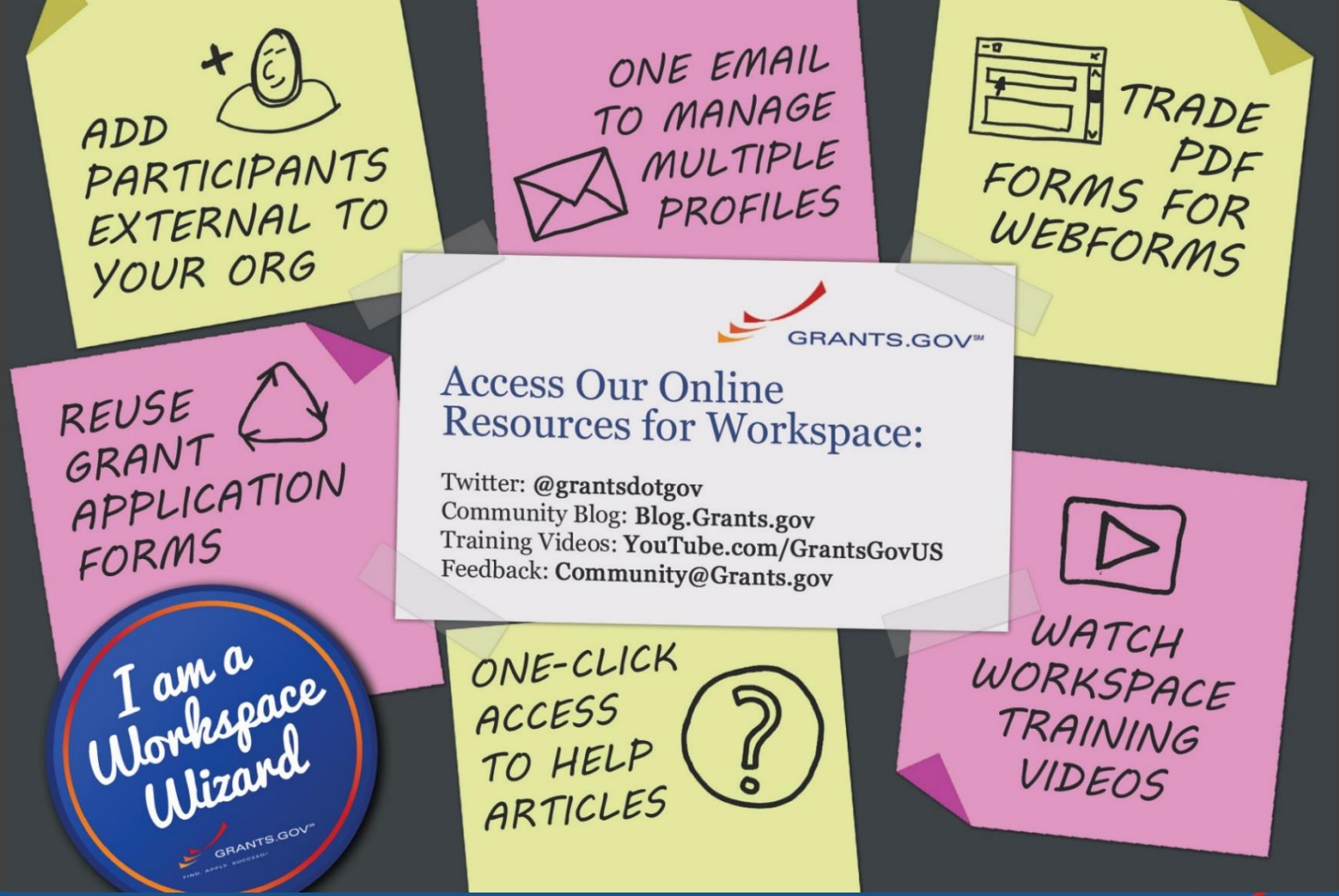

ADD PARTICIPANTS EXTERNAL TO YOUR ORG
ONE EMAIL TO MANAGE MULTIPLE PROFILES
TRADE PDF FORMS FOR WEBFORMS
REUSE GRANT APPLICATION FORMS
GRANTS.GOV
Access Our Online Resources for Workspace:
Twitter: @grantsdotgov
Community Blog: Blog.Grants.gov
Training Videos: YouTube.com/GrantsGovUS
Feedback: Community@Grants.gov
I am a Workspace Wizard
GRANTS.GOV
ONE-CLICK ACCESS TO HELP ARTICLES
WATCH WORKSPACE TRAINING VIDEOS

Grants.gov Workspace Overview

Become a Workspace Wizard

January 9, 2018

For OGAPA 2018 Grants Management Conference

Agenda

- Retired Legacy PDF Application Package
- Benefits of Workspace
- Live-Demonstration of Workspace
- Questions and Feedback

Retire Legacy PDF Application Package

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

- Applicants are no longer 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 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 11:59 PM ET.
- S2S Submissions will continue to be supported.

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

Benefits of Workspace

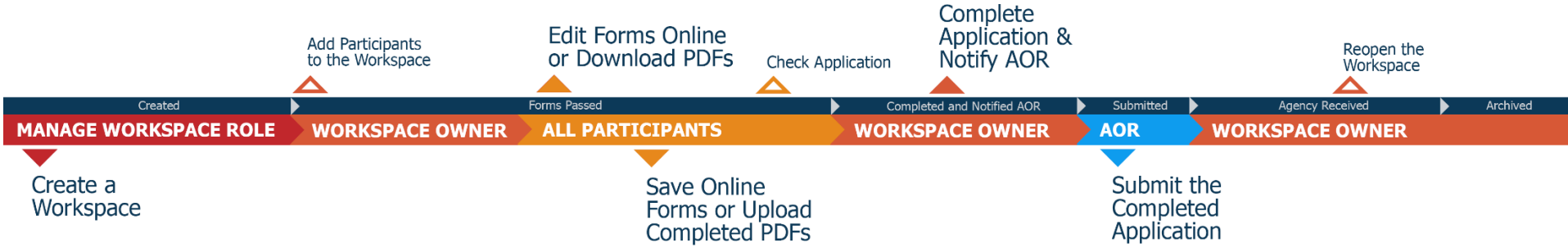
Workspace enhances the Grants.gov Apply functionality by providing applicants with a shared, online environment to collaboratively complete and submit grant applications

- 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

Live Demonstration of Workspace

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

1) Creating a Workspace
2) Adding Participants to the Workspace
3) Completing the Application Forms within Workspace
   - Online Webforms
   - Offline PDF Forms
4) Submitting via Workspace



Grants.gov Workspace Resources

Grants.gov Website

- Workspace Overview
- Interactive Workspace Workflow Graphic
- Infographic: Roles and Access Levels in Workspace

Webinar Video

- Grants.gov Workspace Webinar: Become a Workspace Wizard (October 10, 2017)

Training Videos

- Watch the Learning Workspace Video Series [Playlist], which includes the following tutorials:
  - *Introducing Grants.gov Workspace Functionality*
  - *User Roles & Access Levels in Workspace*
  - *How to Create a Grants.gov Workspace*
  - *How to Add Participants to a Workspace*
  - *Completing Forms in a Workspace*
  - *How to Complete a Federal Grant Application in Workspace*

Grants.gov Community Blog Posts

- Grants.gov Workspace: Fast, Easy to Use, and Secure
- 7 Tips for Transitioning Your Organization to Grants.gov Workspace
- Grants.gov Workspace for Colleges and Universities

Online Help Articles

- How to Add or Remove Roles for a Specific User
- How to Create a Workspace
- How to Add Participants (Registered Grants.gov Users) to a Workspace
- How to Complete Webforms Within a Workspace
- How to Add an Attachment to a Webform
- How to Restrict Access to Budget Forms
- How to Submit an Application in Workspace

Contact Us

- If you have any general questions, feedback or concerns about Grants.gov Workspace, please contact us via email at community@grants.gov

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

Connect with Grants.gov

- Stay connected with Grants.gov through social media to find out more about what's coming, new training opportunities, and updated resources

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

SUPPLEMENT

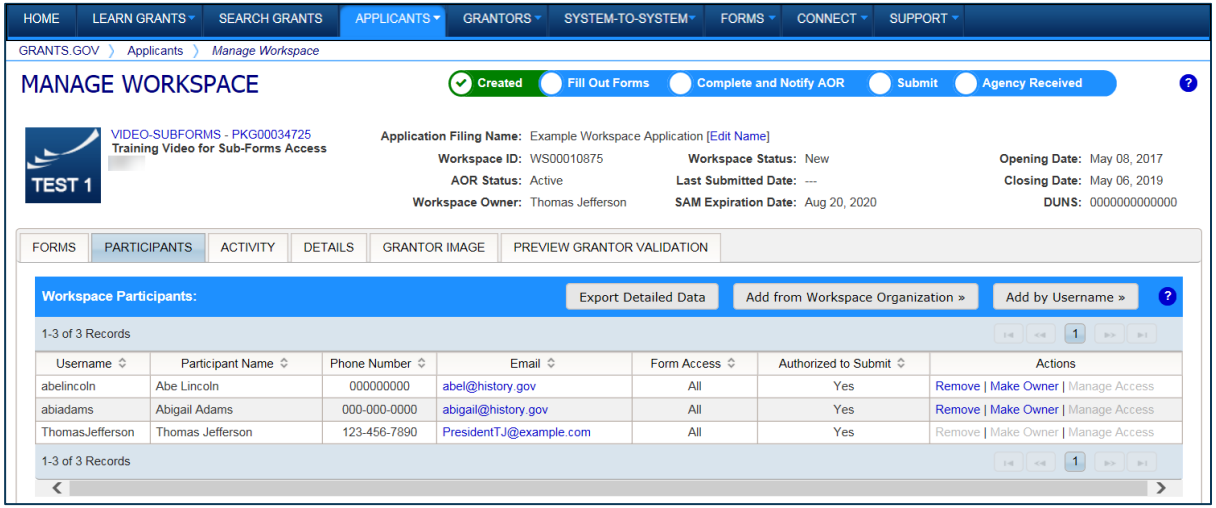
FOR RELEASE 16.1

OVERVIEW

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

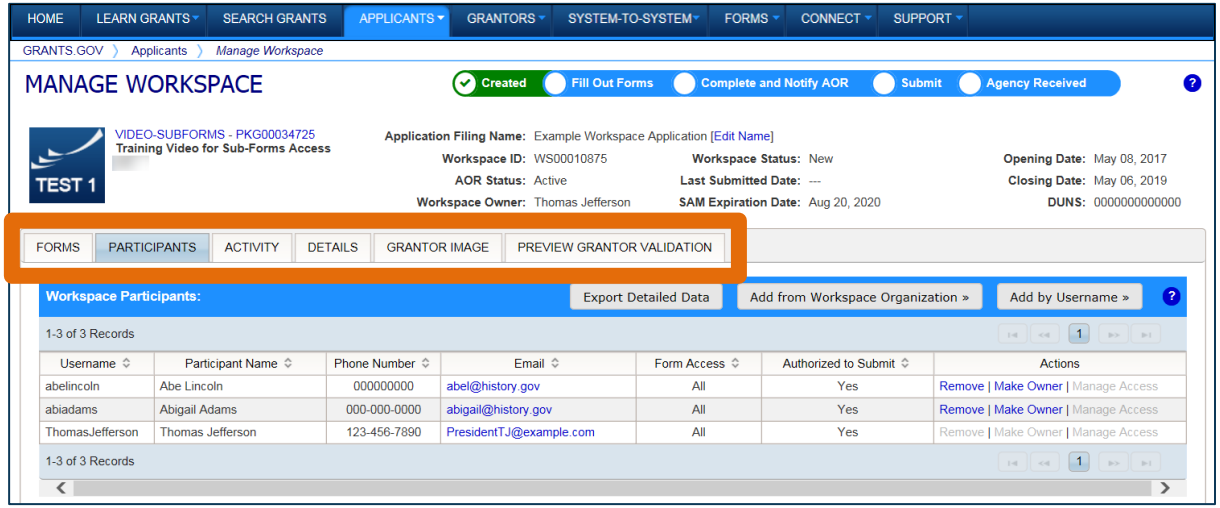
WHAT IS WORKSPACE?

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.

WHAT IS WORKSPACE?

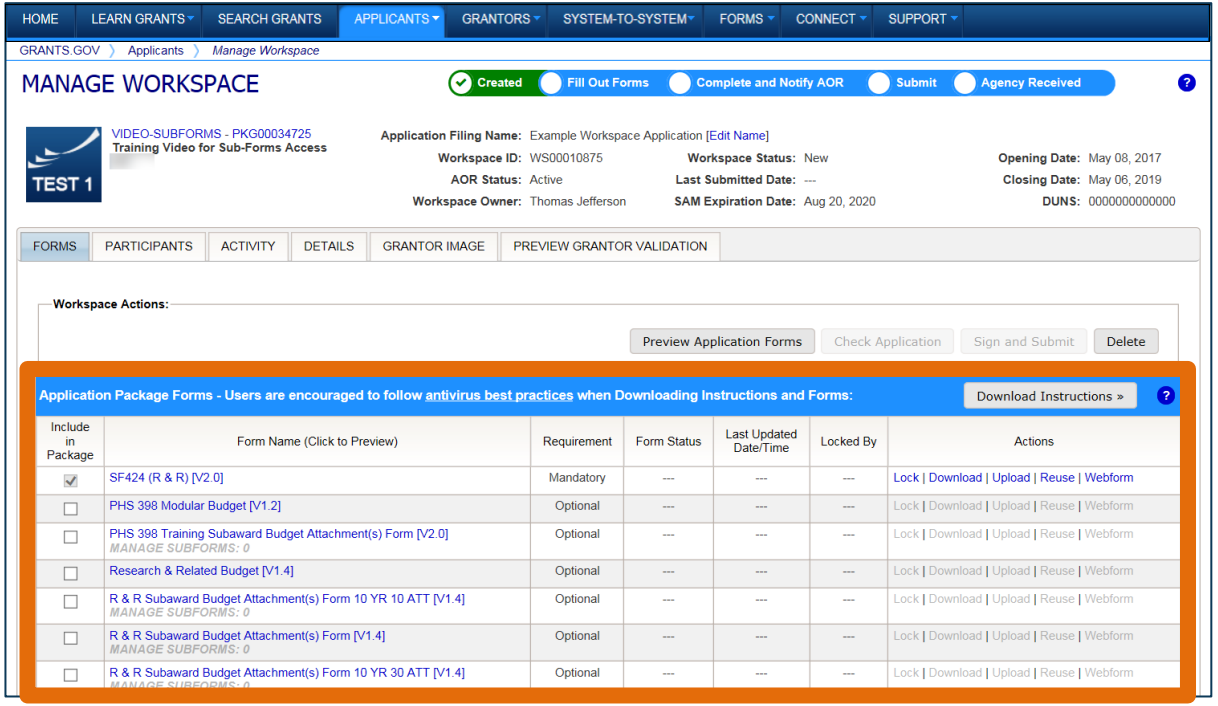


The top section of each workspace contains key information about the application status.

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**

WHAT IS WORKSPACE?

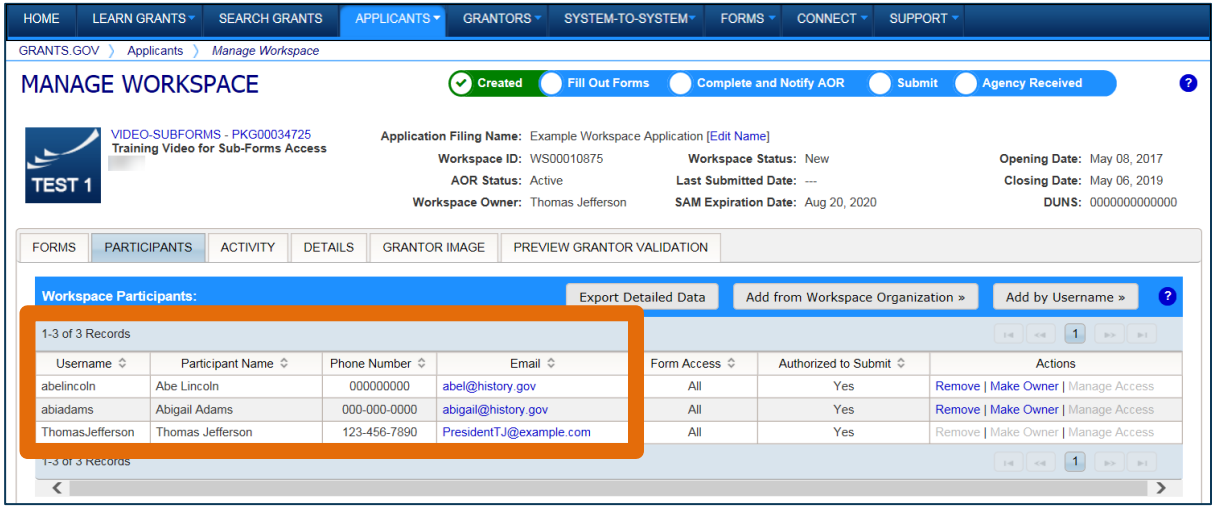


The **Forms** tab contains individual forms that are part of the workspace application package.

Key Actions:

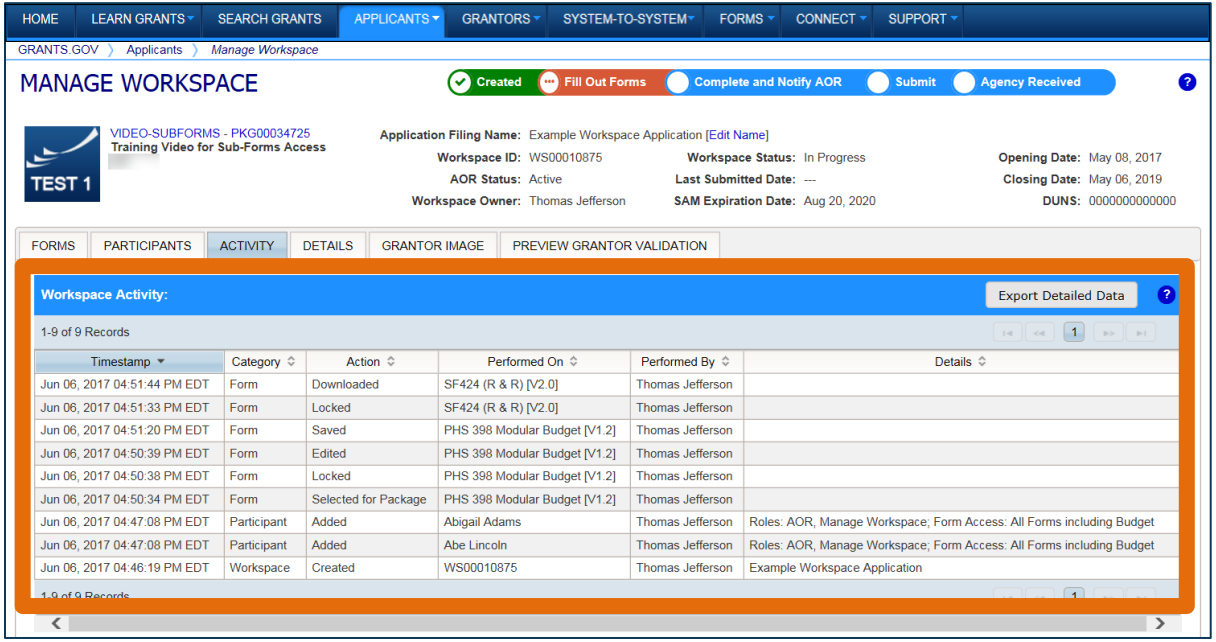
- Fill out webforms (*if available*)
- Lock/Unlock forms
- Download/Upload PDF forms
- Reuse forms

WHAT IS WORKSPACE?



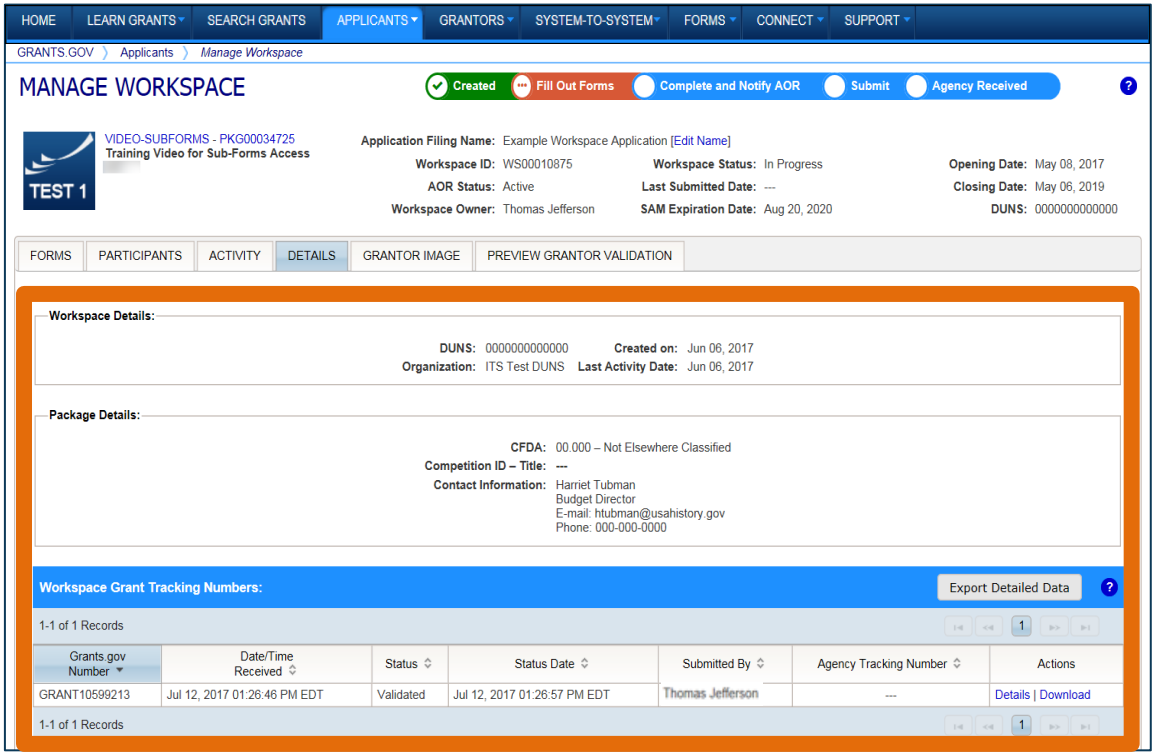
The **Participants** tab lists the members, or "Participants," of a workspace who work as a team to complete the required forms for a federal grant.

WHAT IS WORKSPACE?



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

WHAT IS WORKSPACE?



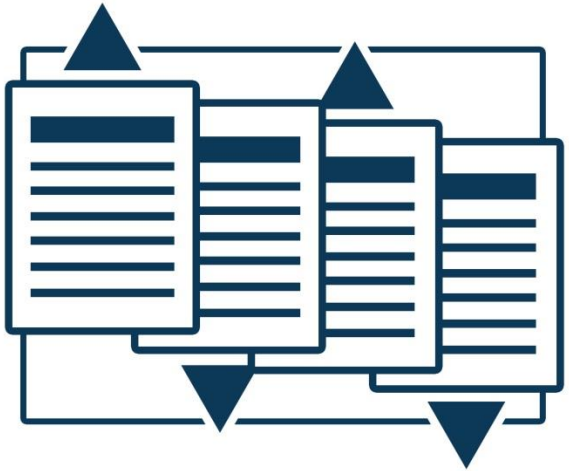
The **Details** tab lists submission history, including links to download every submitted (and re-submitted) application.

WHY USE WORKSPACE?

1

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

WHY USE WORKSPACE?



2

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

WHY USE WORKSPACE?

3

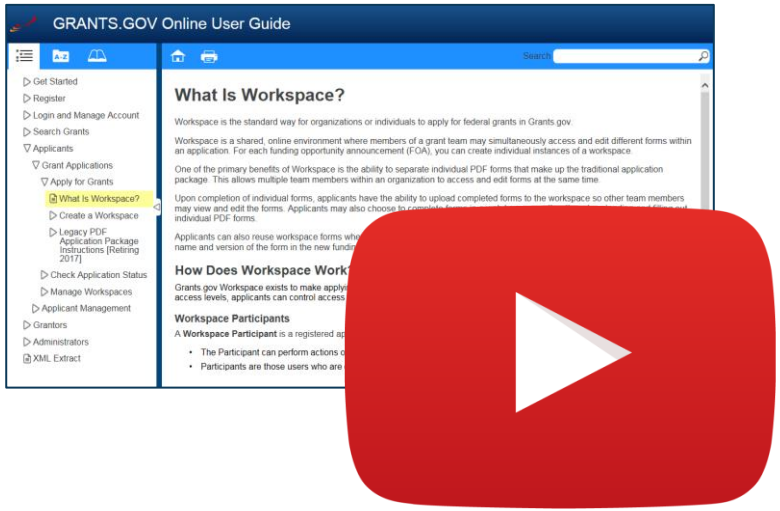
Forms are **validated** when they are uploaded to the workspace, virtually eliminating last-minute submission errors.

WHY USE WORKSPACE?

4

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

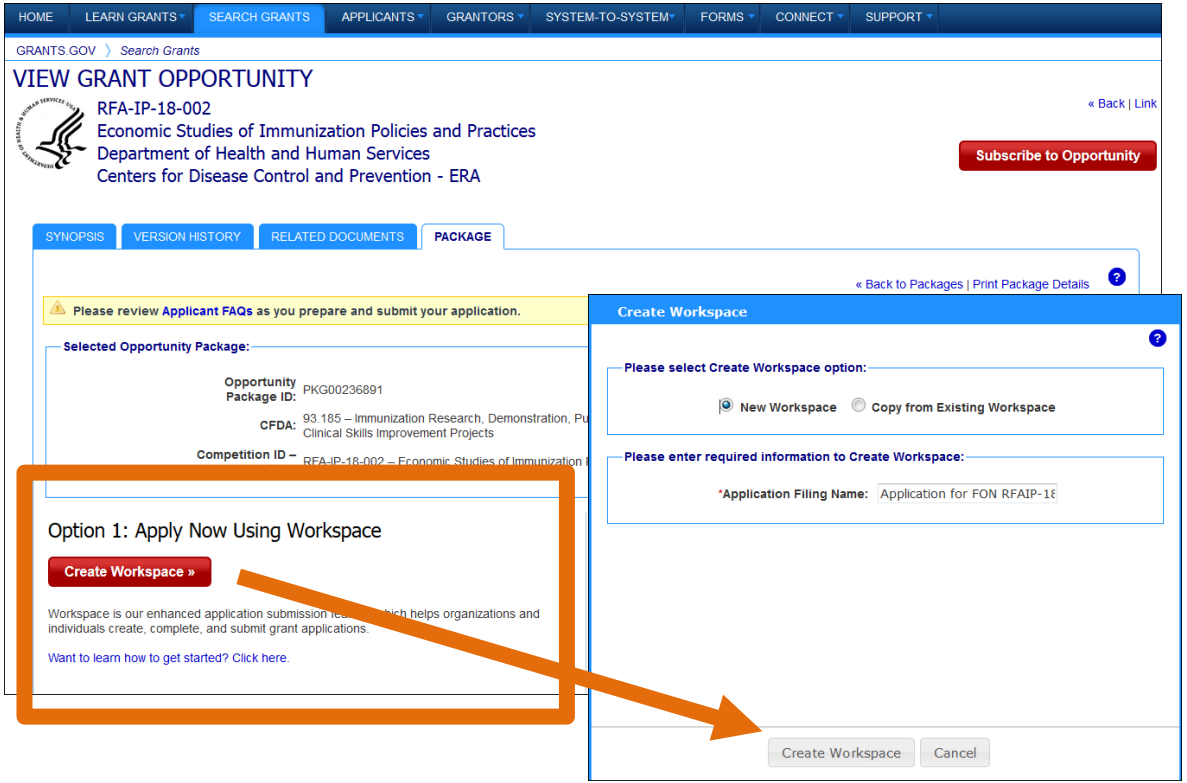
WHY USE WORKSPACE?



Resources

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

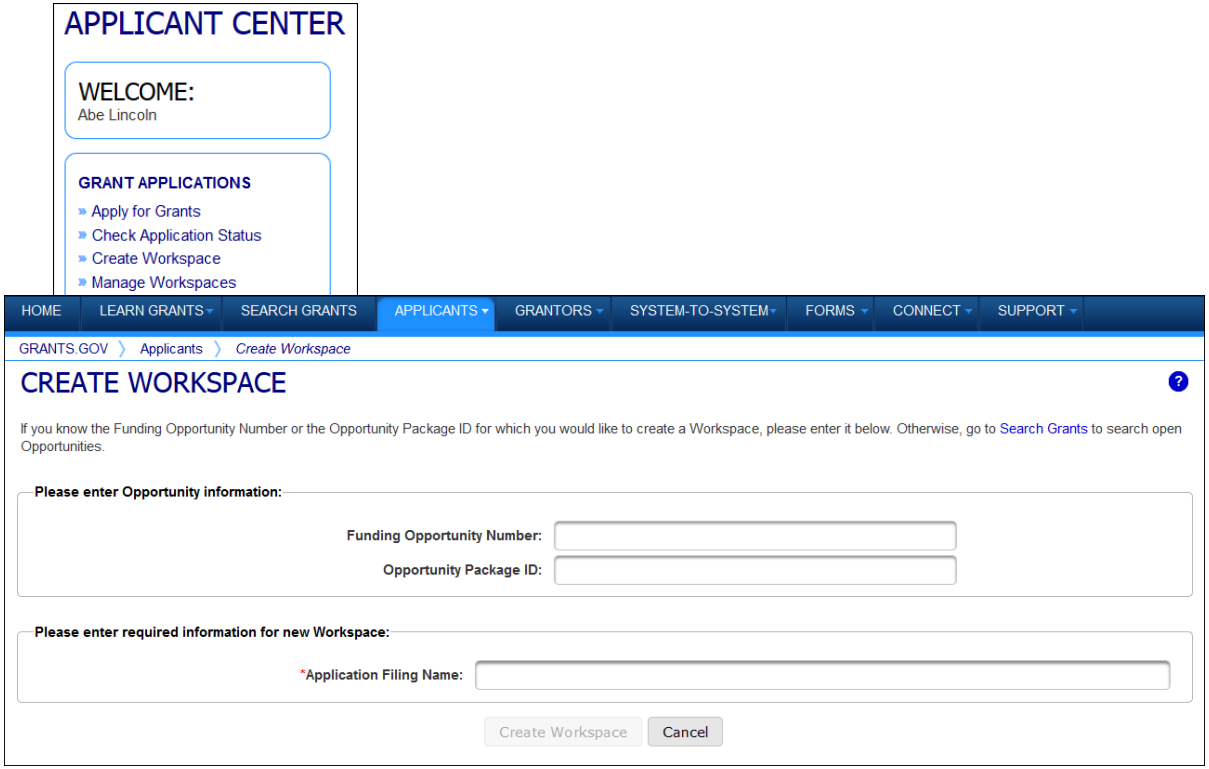
CREATING A WORKSPACE



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

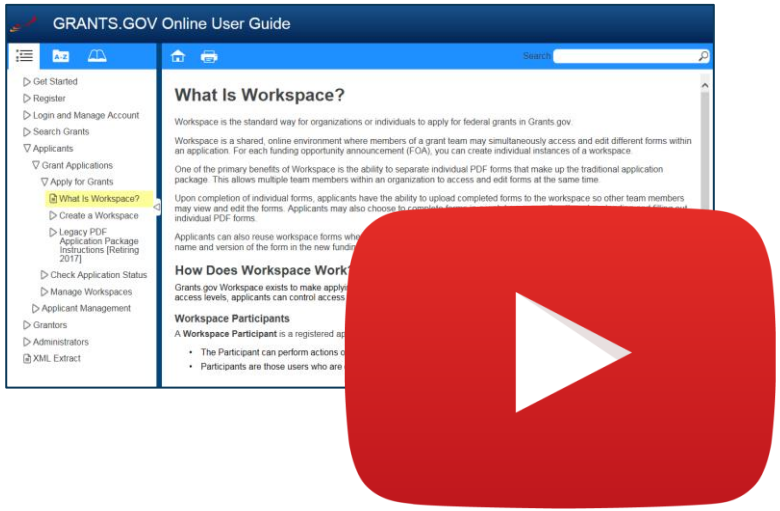
If the application package is compatible with Workspace, you will be able to create a new workspace.

CREATE WORKSPACE



Alternatively, if you know the Funding Opportunity Number or Opportunity Package ID, then create a workspace by selecting the **Create Workspace** menu option.

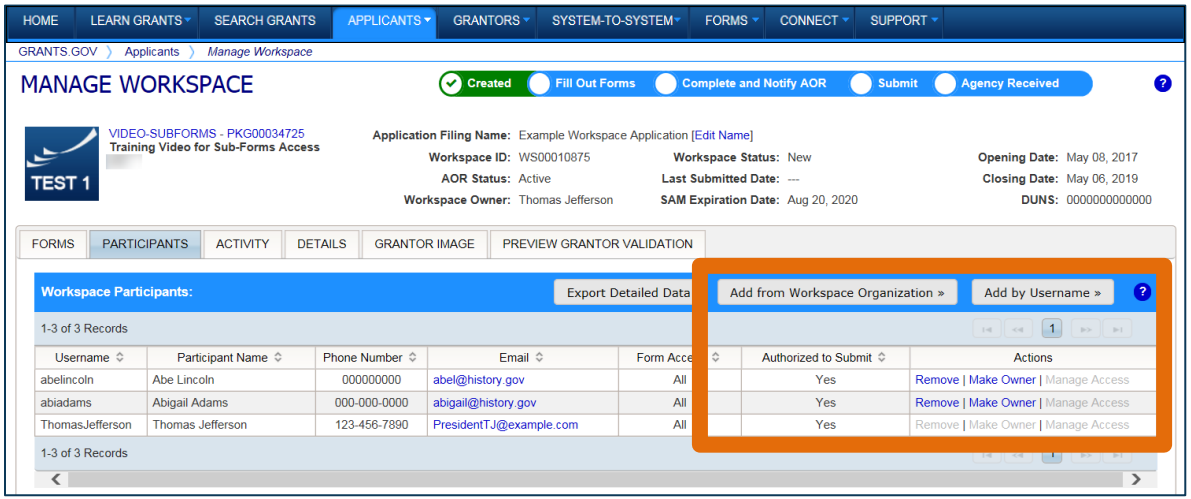
CREATING A WORKSPACE



Resources

- [Video: How to Create a Workspace]
- [Online User Guide: Create a Workspace]

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

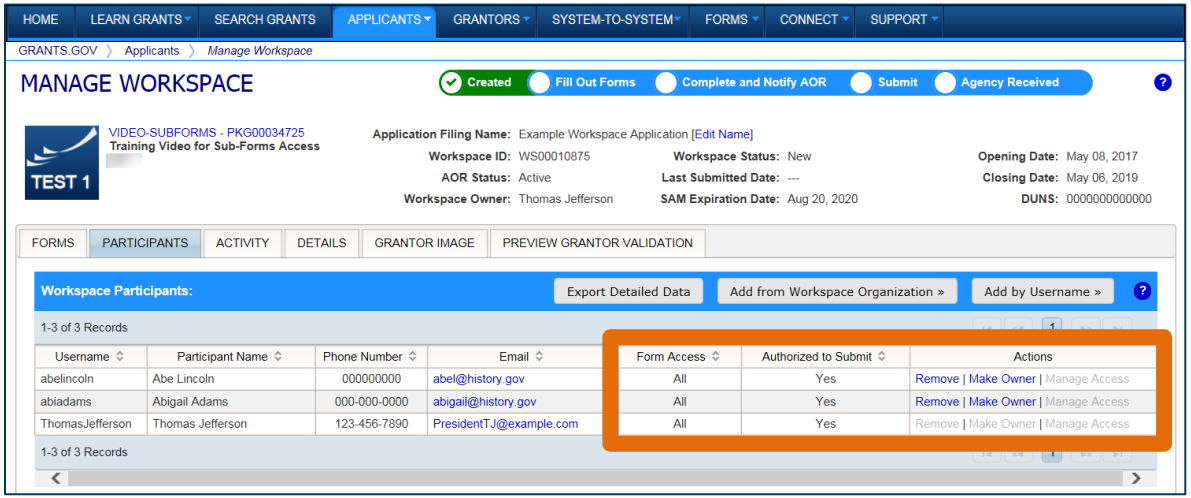
Removing Participants:

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



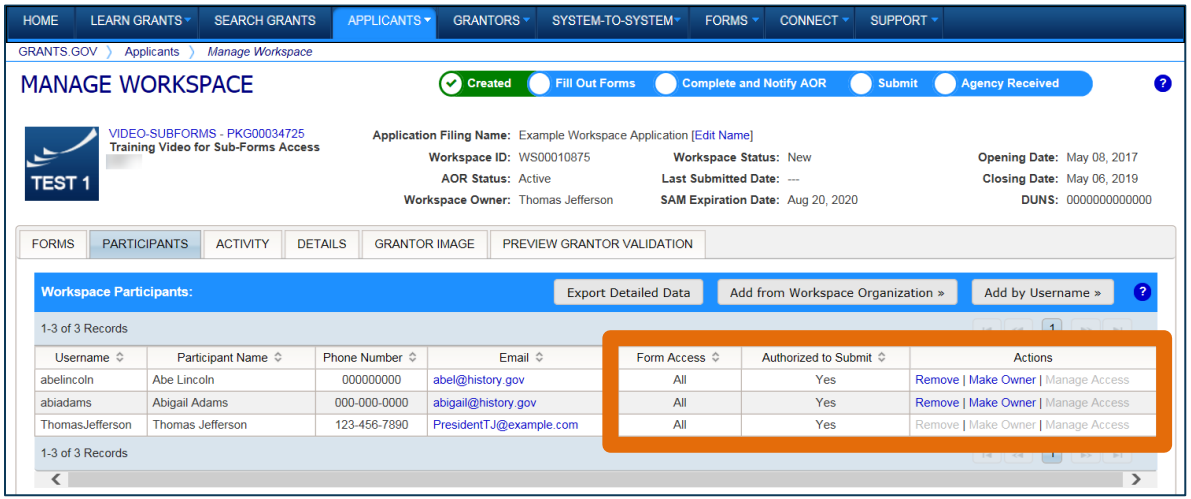
Roles:

- 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



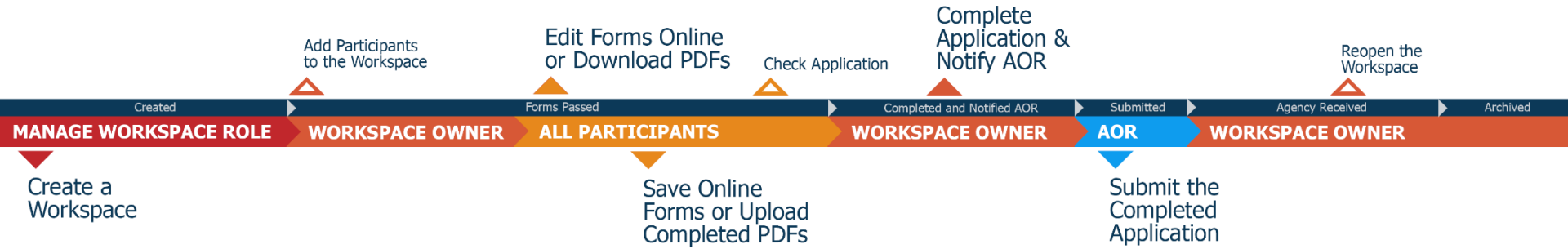
Access Levels:

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

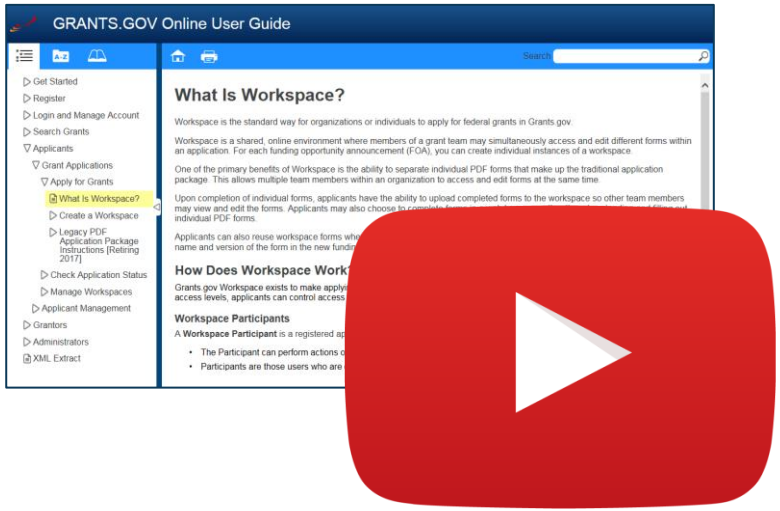
***AORs with expanded access** are able to view and submit the application for any workspace within the organization.

MANAGING PARTICIPANTS & ROLES

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



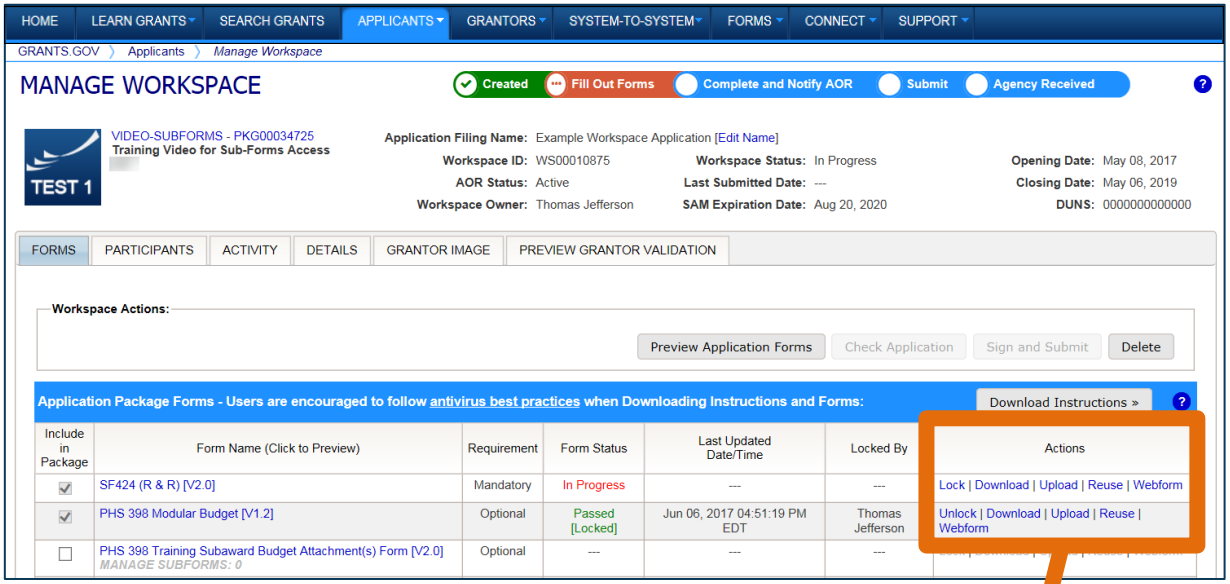
MANAGING PARTICIPANTS & ROLES



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]

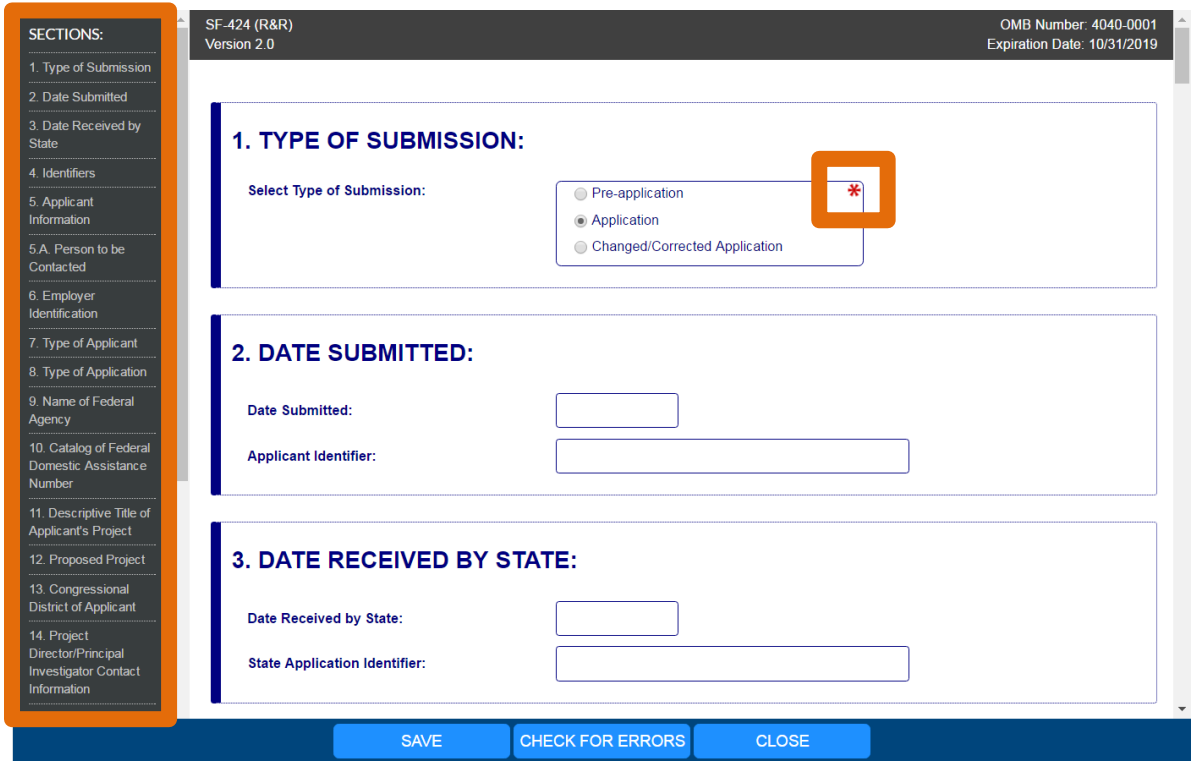
COMPLETING WORKSPACE FORMS



Key Actions:

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

COMPLETING WEBFORMS



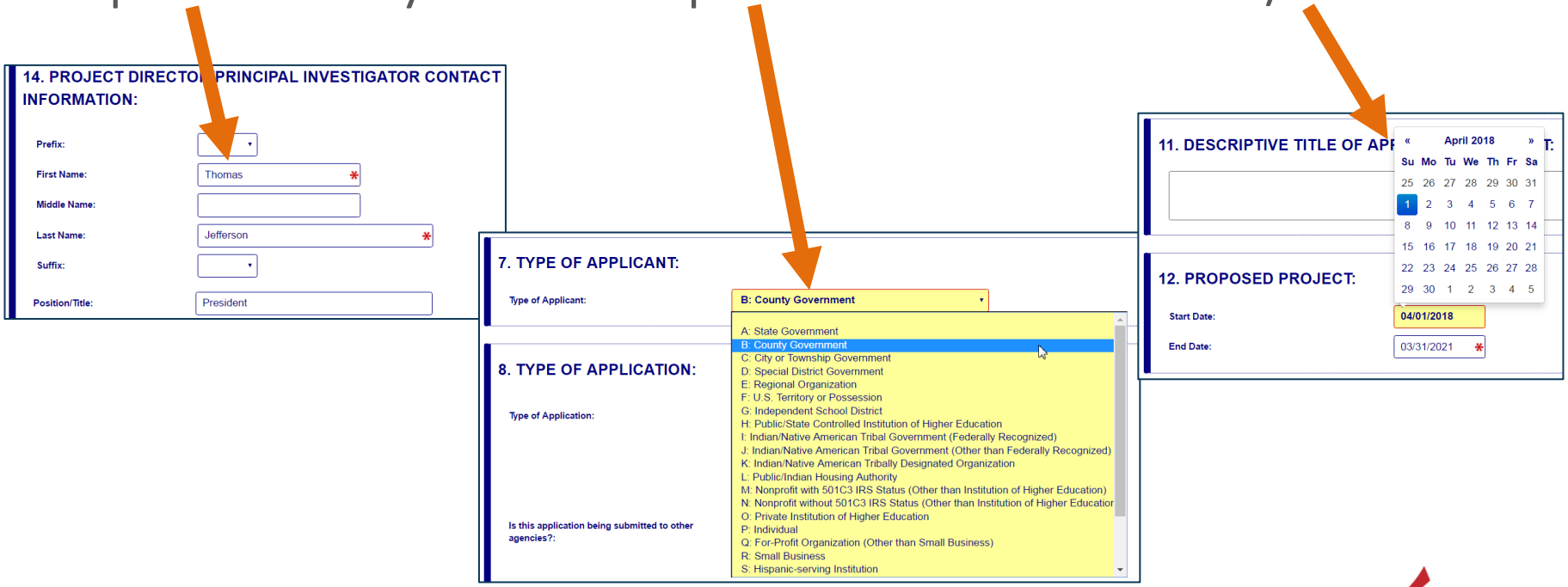
Webform Basics:

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

COMPLETING WEBFORMS

Filling Out Fields:

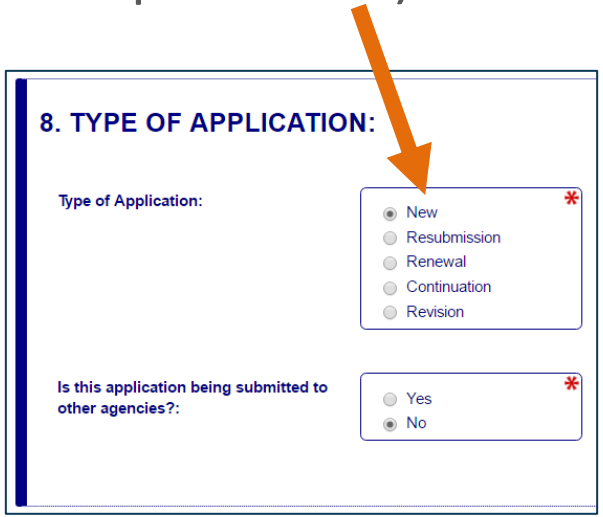
- Open text entry
- Drop-down menu
- Dates/calendar



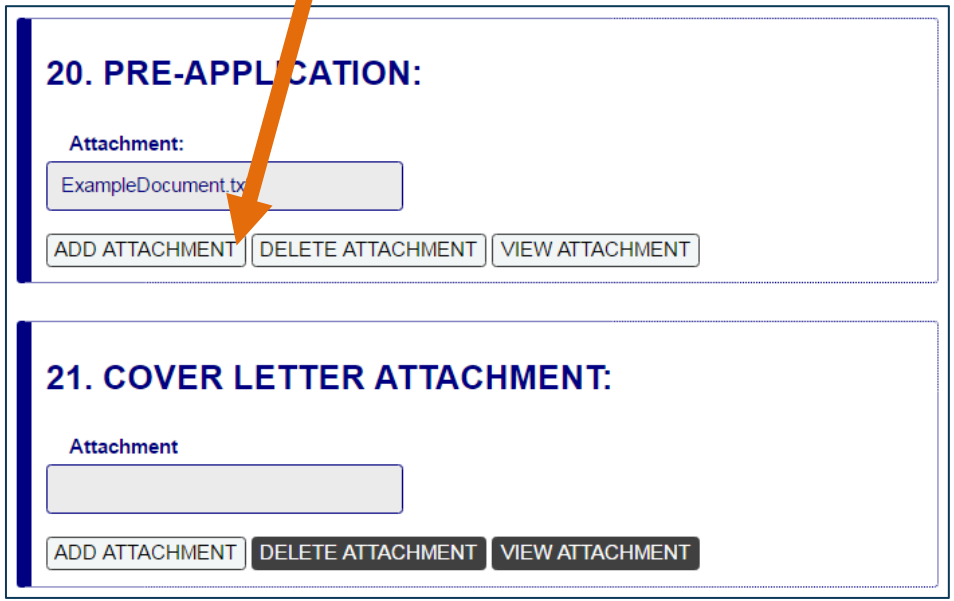
COMPLETING WEBFORMS

Filling Out Fields:

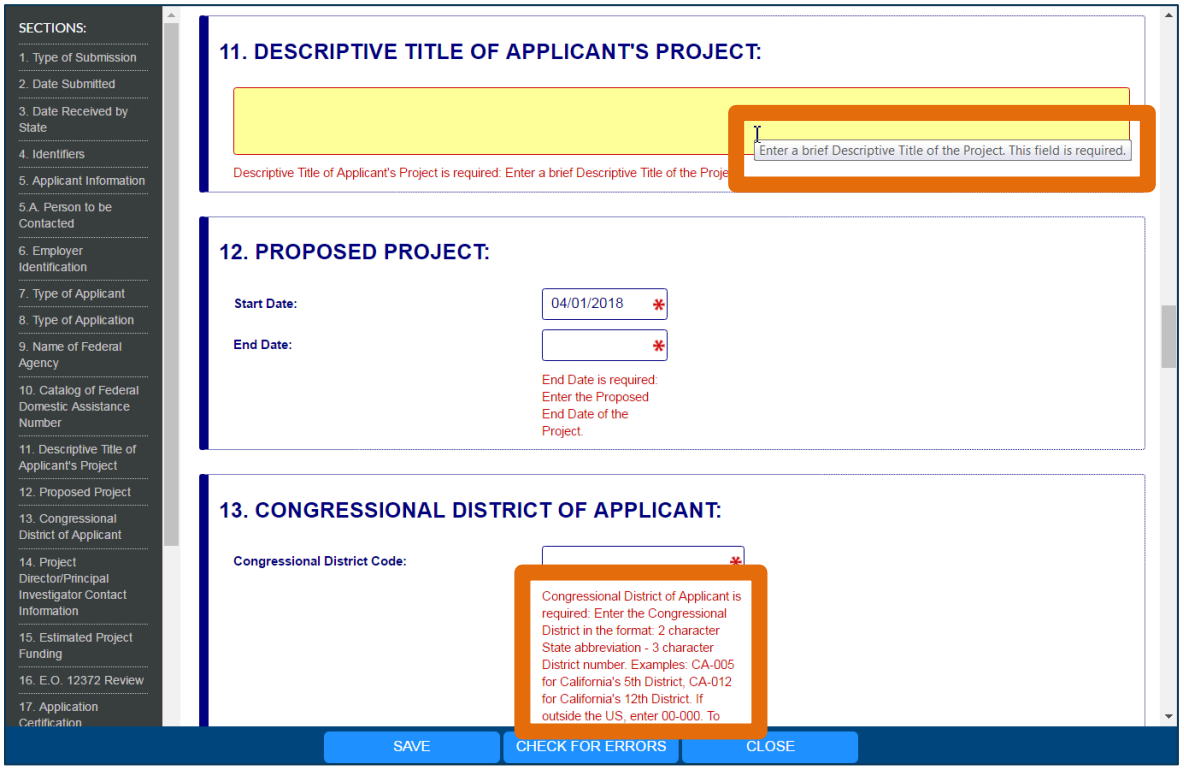
- Radio buttons (multiple choice)



- Attach files within online form



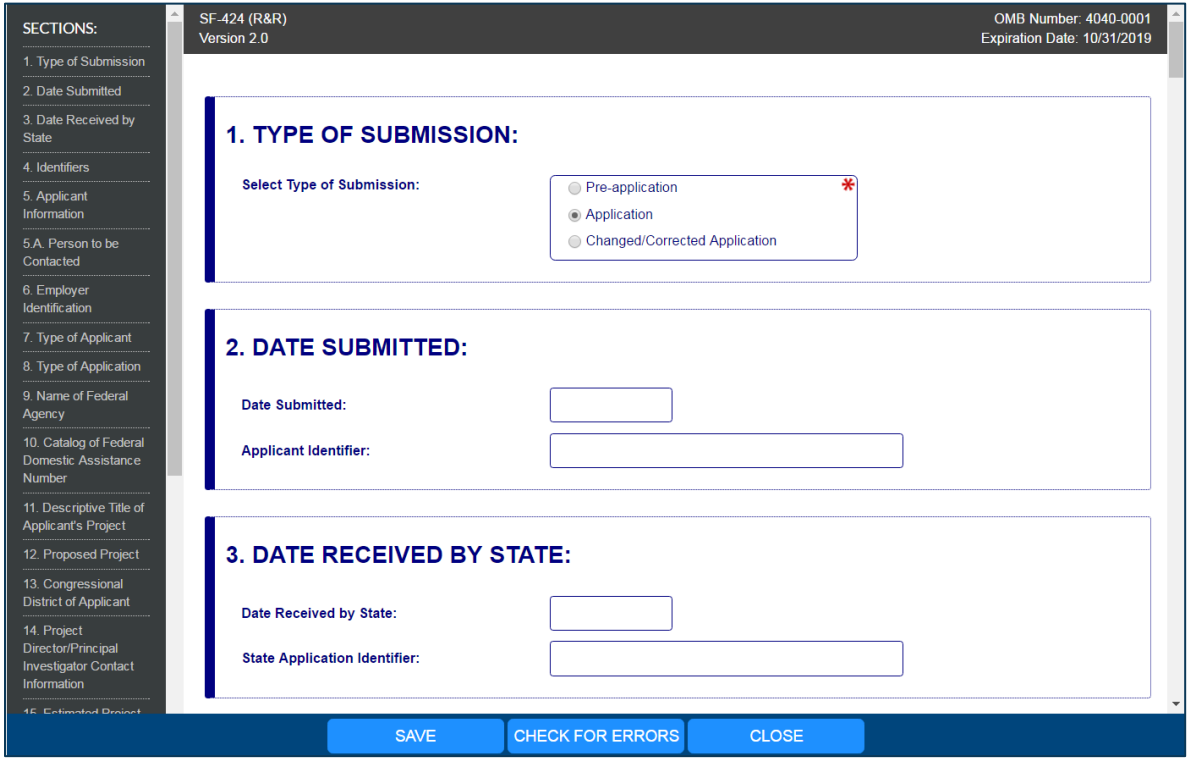
COMPLETING WEBFORMS



More Features:

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

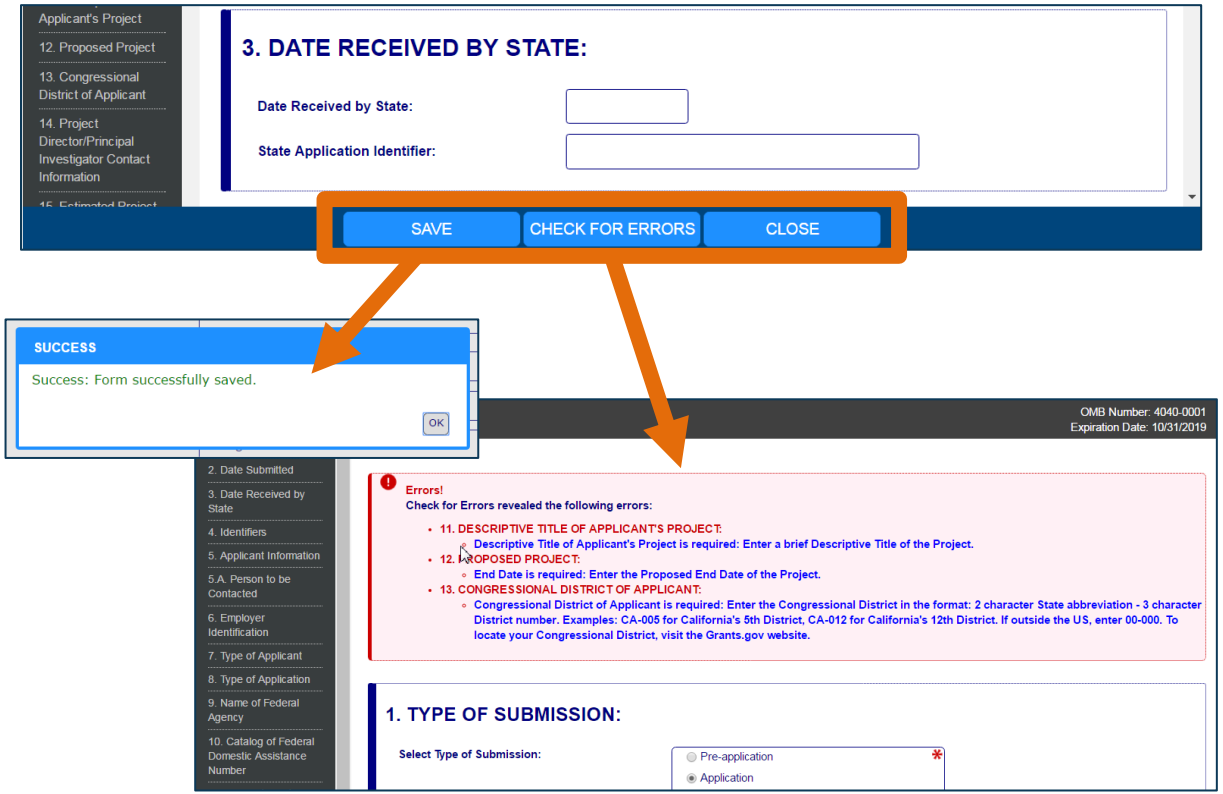
COMPLETING WEBFORMS



More Features:

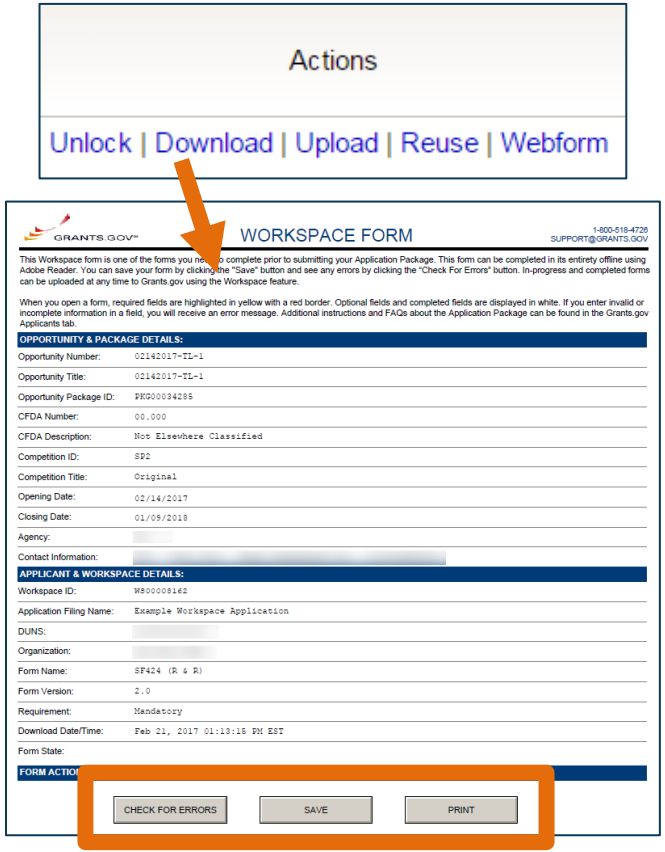
- Autosave occurs every 5 minutes
- Complete SF-424 first to pre-populate form fields and save time

COMPLETING WEBFORMS



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

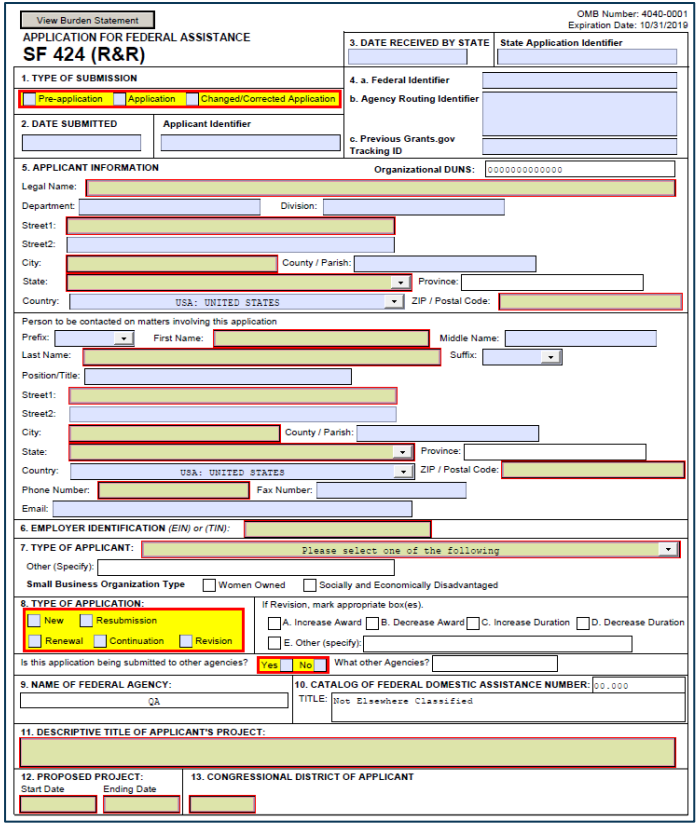
COMPLETING PDF FORMS



PDF Form Basics:

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

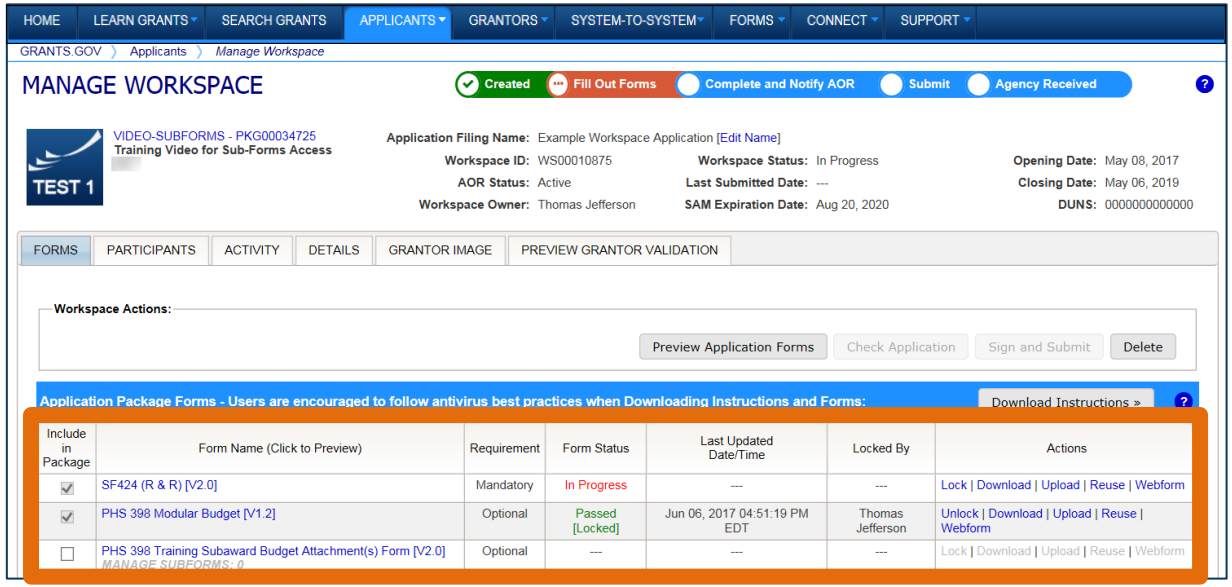
11. DESCRIPTIVE TITLE OF APPLICANT'S PROJECT:

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

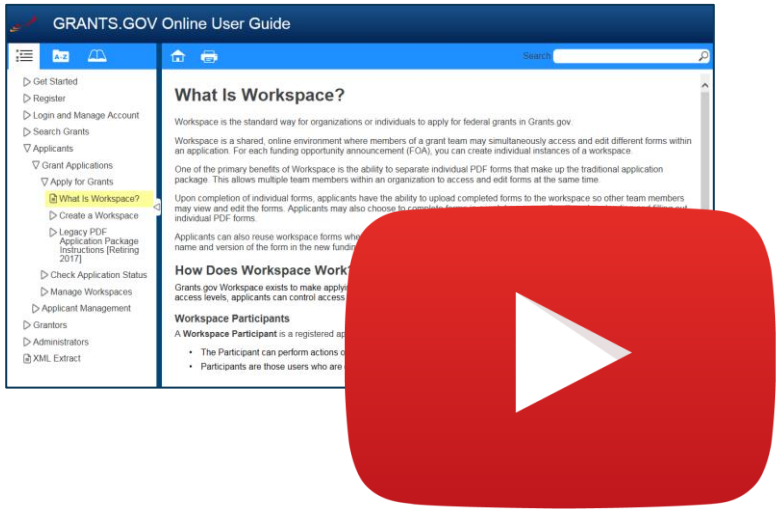
COMPLETING WORKSPACE FORMS



Workspace Features:

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

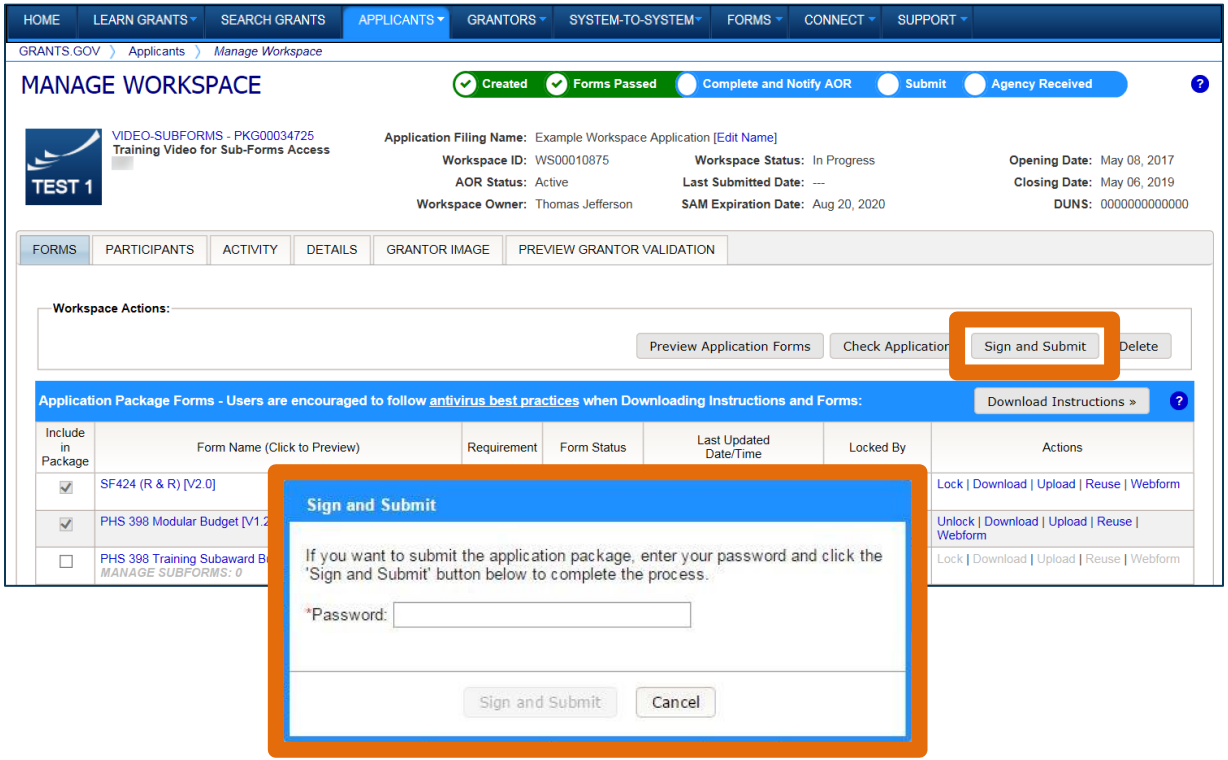
COMPLETING WORKSPACE FORMS



Resources

- [Video: How to Complete Forms in a Workspace]
- [Video: Reuse a Saved Workspace Form]
- [Online User Guide: Forms Tab—Managing Forms]

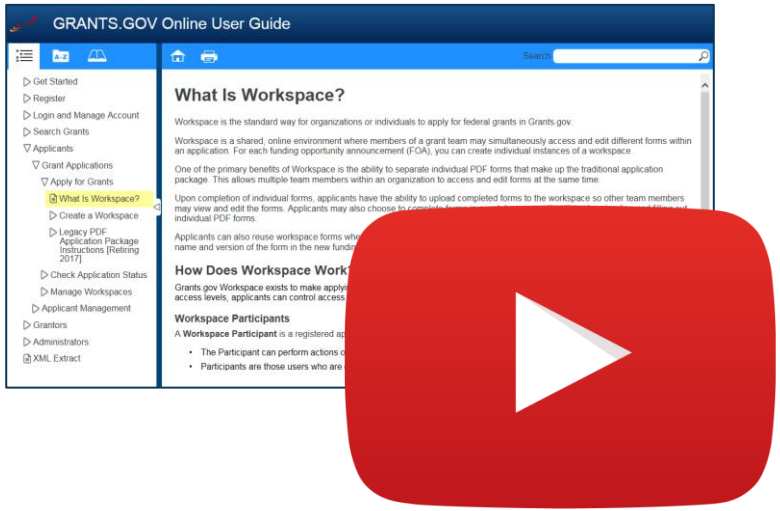
SUBMITTING VIA WORKSPACE



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

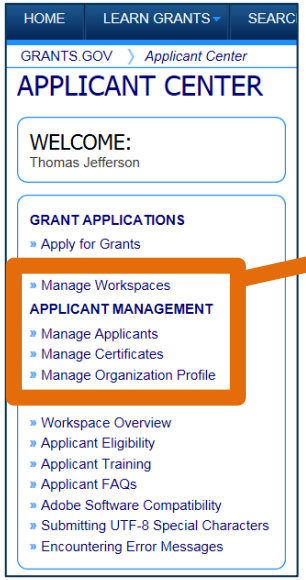
SUBMITTING VIA WORKSPACE



Resources

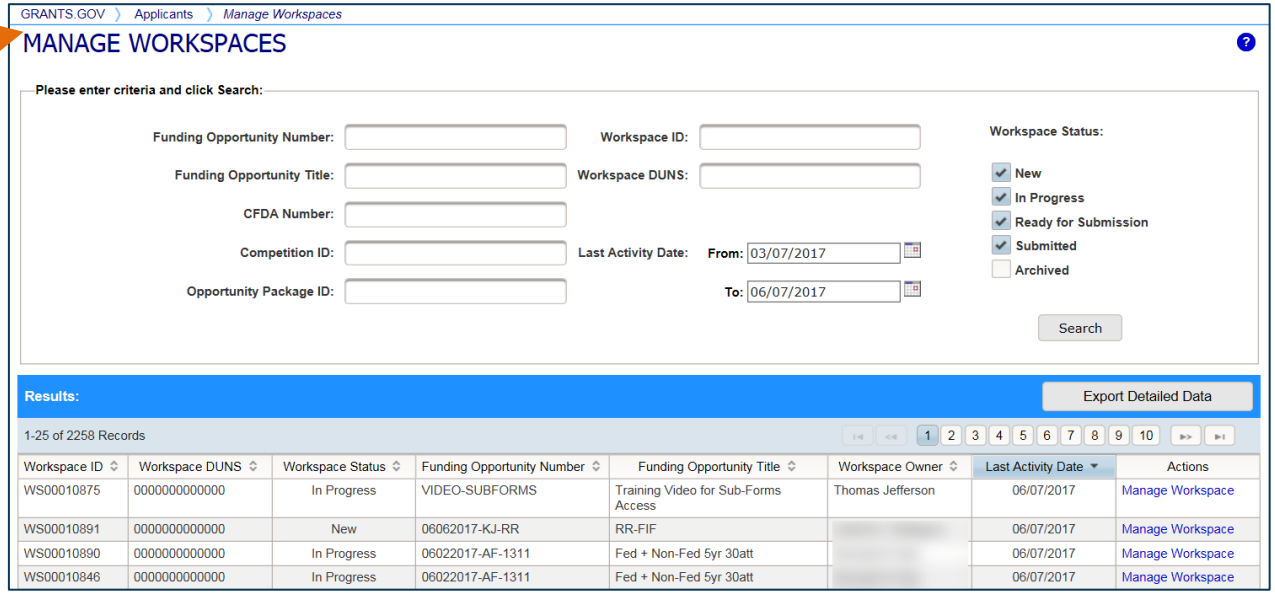
- [Video: How to Submit an Application in Workspace]
- [Video: Reopen a Workspace for Additional Edits]
- [Online User Guide: Check Application in Workspace]
- [Online User Guide: Submit a Workspace Package]

ORGANIZATION MANAGEMENT

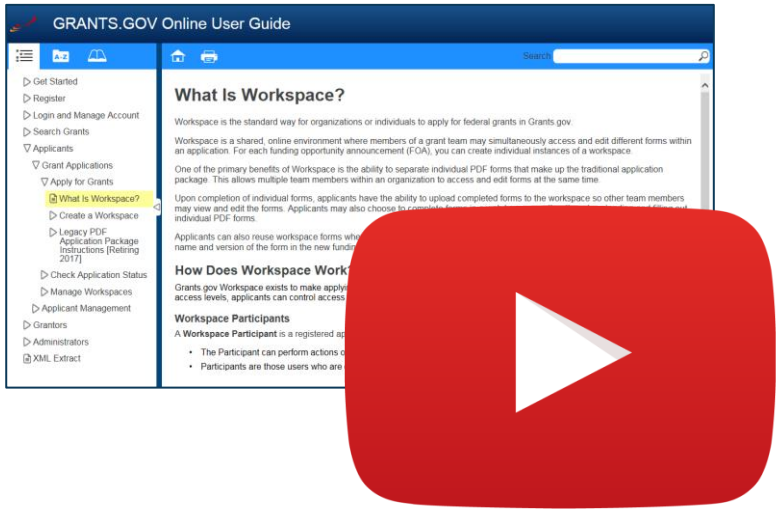


Key Actions

- 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**