

GROW-MO SHAREPOINT SITE **(Grant Resources and Opportunities Warehouse)**



Instruction Manual

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1. GROW-MO Background

Ever since the 2009 American Recovery and Reinvestment Act was passed, grant funding as a means to stimulate the economy, reinvest in infrastructure, sustain programs has been in the increase. The Recovery Act also established several historic firsts in government – federal agencies are required to report on how they are distributing funds and recipients of grants are required to report on how they are spending the funds, and all the information from agencies and recipients is posted on Recovery.gov. Accountability and transparency have become the new standards.

In 2011 the focus on accountability continued with a Presidential Executive Order on Delivering an Efficient, Effective and Accountable Government, with the establishment of the Government Accountability and Transparency Board (GATB). At the same time, OMB created a Council on Financial Assistance Reform (replacing the Grants Policy Council and the Grants Executive Board). The Council's activities will include providing recommendations to OMB on policies and actions necessary to effectively deliver, oversee and report on grants and cooperative agreements, and will identify emerging issues, challenges and opportunities in grant management and policy, including improvements to the competitive grants-making process. The Council will also serve as a clearinghouse of information on innovations and best practices in grants management.

In order to respond to, and be prepared for changes that will result from these federal initiatives, and to acknowledge the important role that grants play in many state agencies, the Missouri grant clearinghouse/warehouse was created. This clearinghouse is intended to serve the goals:

- Enable collaboration among agencies for grant applications and post-award.
- Act as a repository for grant writers to share best practices for grant writing, sharing language, data, etc.
- Serve as a central clearinghouse for grant applications to be peer reviewed, to go through executive level review.
- Tracking applications from draft to submission and award.
- Reporting on grants awarded by agency.
- Improve work product quality.
- Greater visibility and transparency in grants.
- Avoid duplication, maximize resources.

2. Critical Success Factors

The establishment of a Grant Clearinghouse/Warehouse across state agencies is a culture change initiative which requires organizational commitment. Some of the key success factors are:

- Increased collaboration among state agencies on grant applications reflected by more applications with two or more agencies.
- Ready access to all grant submissions across agencies.
- Leverage "best practices" to enhance grant application quality.
- Adjust approach based on continuous client feedback.
- Becomes the trusted resource for all things grant-related.
- Promote grant clearinghouse so it can be part of every agency's culture.
- Define and communicate roles and responsibilities to ensure that staff understands what is expected of them and what they should expect from the clearinghouse.

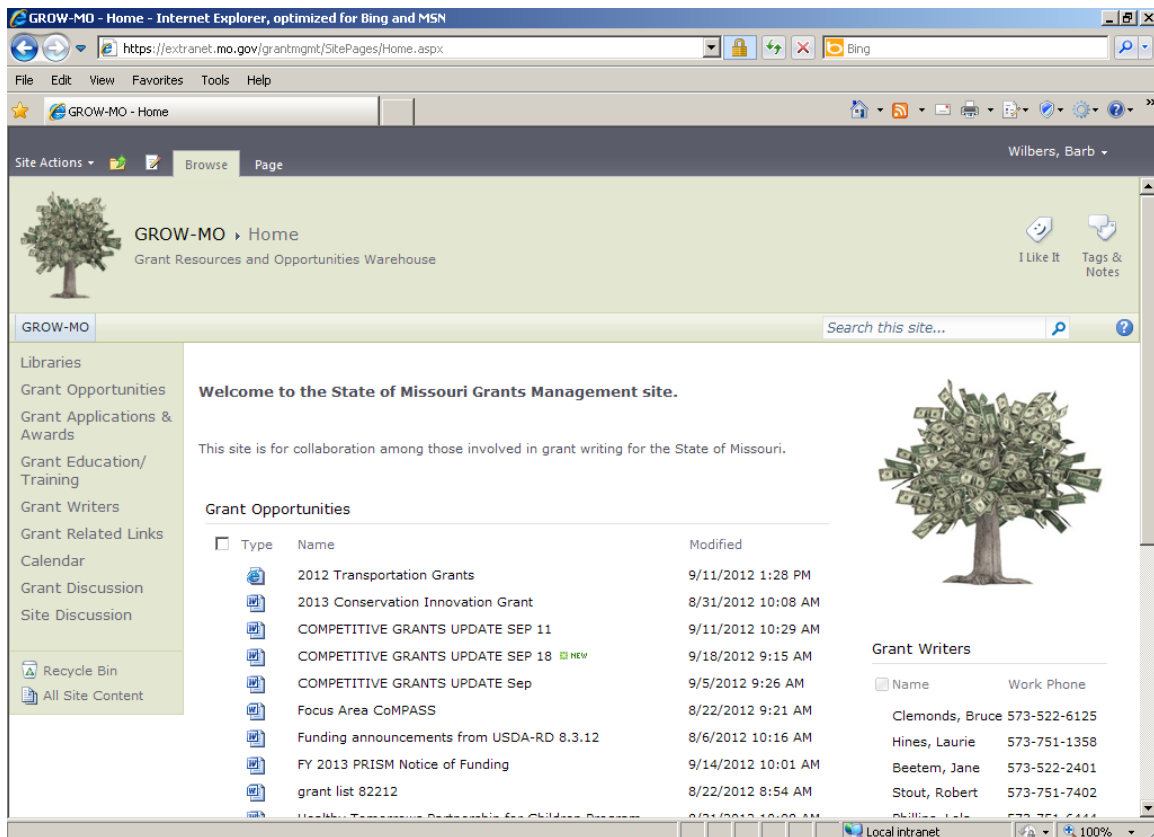
3. Future of GROW-MO

The SharePoint site described in this document is a starting point. This document exists as an evolving document. Changes will be made to reflect the experiences of the users.

4. Site URL

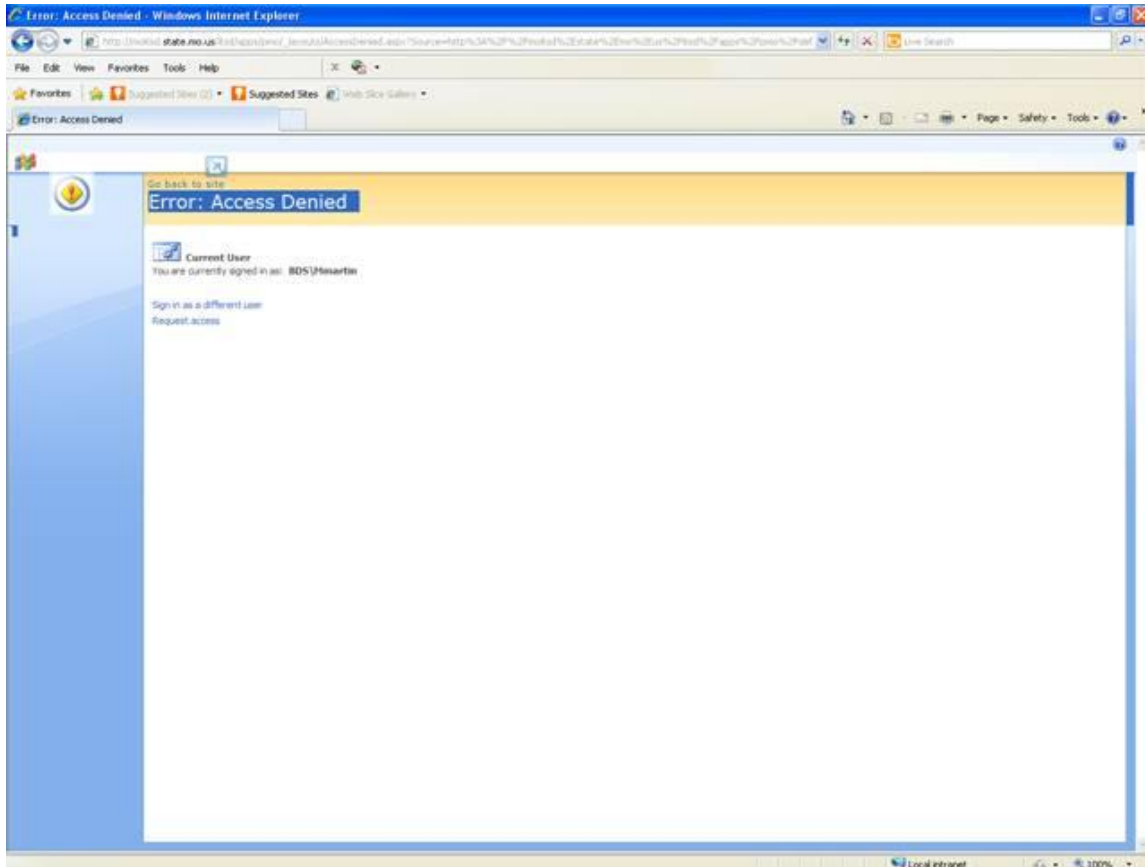
SharePoint is the repository for GROW-MO. The site URL is: <https://extranet.mo.gov/grantmgmt>. The Welcome Page contains the links to the contents of the site in the navigation bar on the left side.

This is what you will see when you are able to access the site. .



5. Requesting Access

You **must request access** as a user of this internal site. To request access send an email to Laurie.Hines@health.mo.gov. Laurie will be the administrator of the site. Please include in the email whether you are requesting access because you are a grant writer, peer reviewer, senior level executive, or budget analyst. You will receive an email telling you access has been granted. When you sign on the first time you will need your user name and domain, and password that you use to sign onto the network in the morning.



Once you have access, to keep from having to enter your domain/username and password each time you access the site, follow these instructions:

Remove the Prompt to Sign into SharePoint each day or on Each Document

1. To Resolve this issue click Tools in Internet Explorer
2. Click Internet Options

3. Click Security Tab



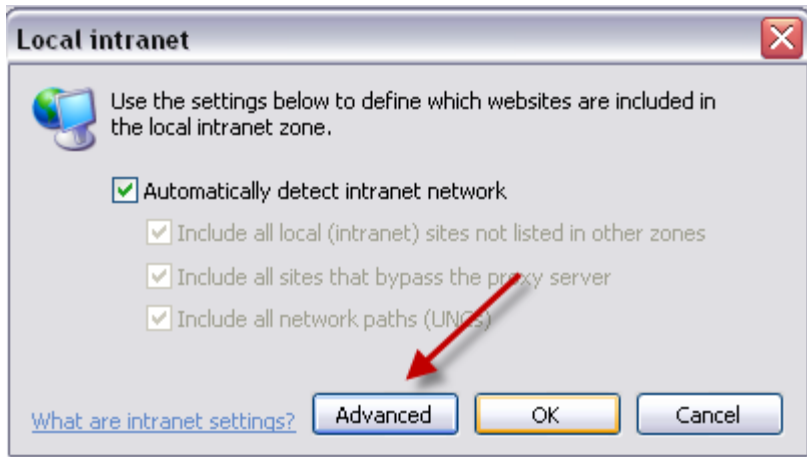
4. Click Local intranet



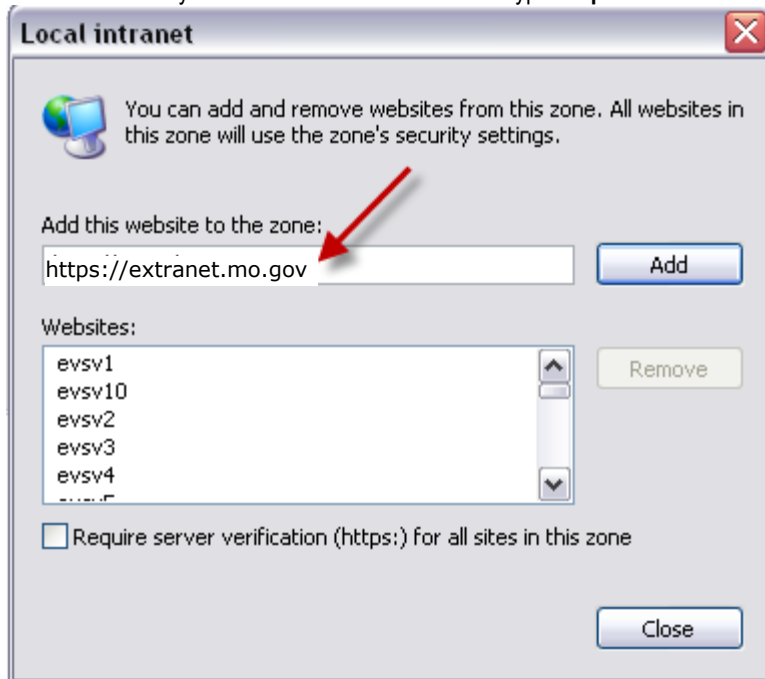
5. Click Sites



6. Click Advanced



7. In the field that says 'Add this website to the zone:' Type: <https://extranet.mo.gov>

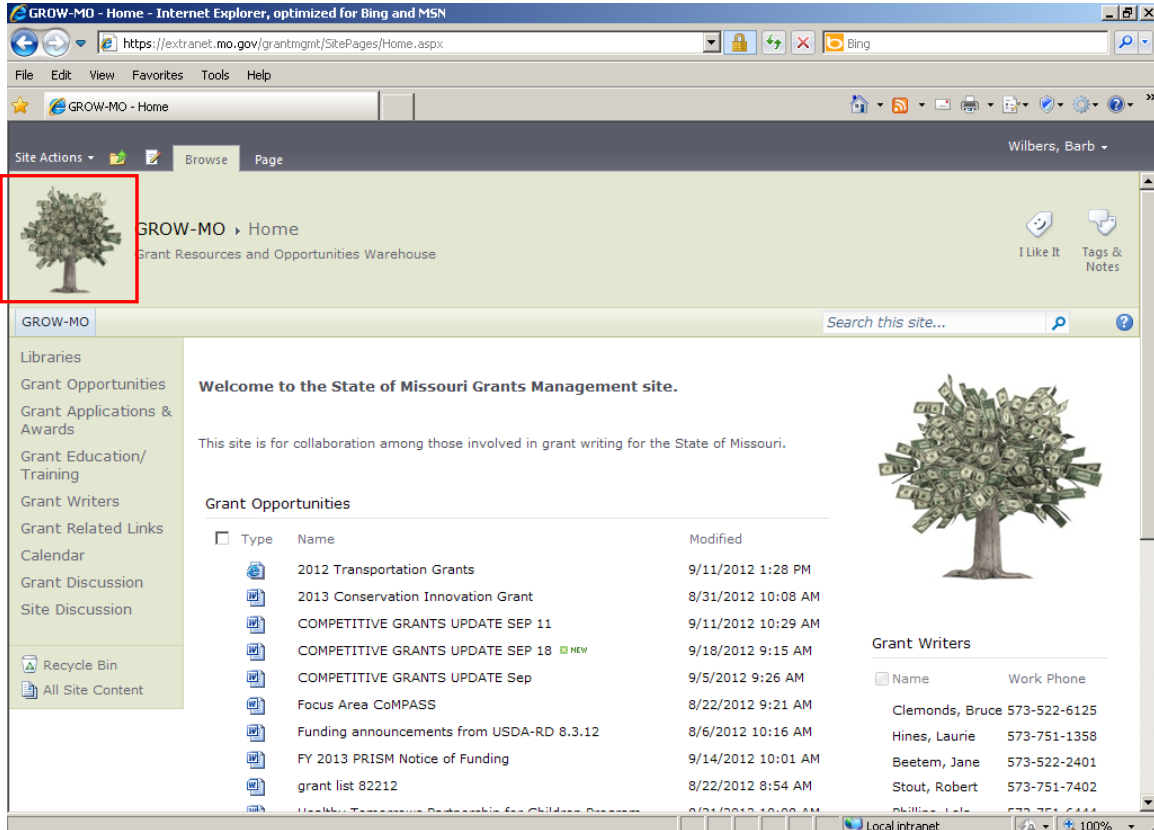


8. Click Add
9. Click Close
10. Click OK
11. Click OK
12. Close Internet Explorer and Reopen
13. Go to the site again. It should **NOT** prompt you for user credentials any more.

(This works for both Windows XP and Windows 7 for accessing a SharePoint site.)

6. Features on the Welcome Screen

You can return to the welcome screen from any link by clicking 'Money Tree' in the upper left corner. The left panel contains all of the libraries available to you on the site. This section will give you a short description of each of them.



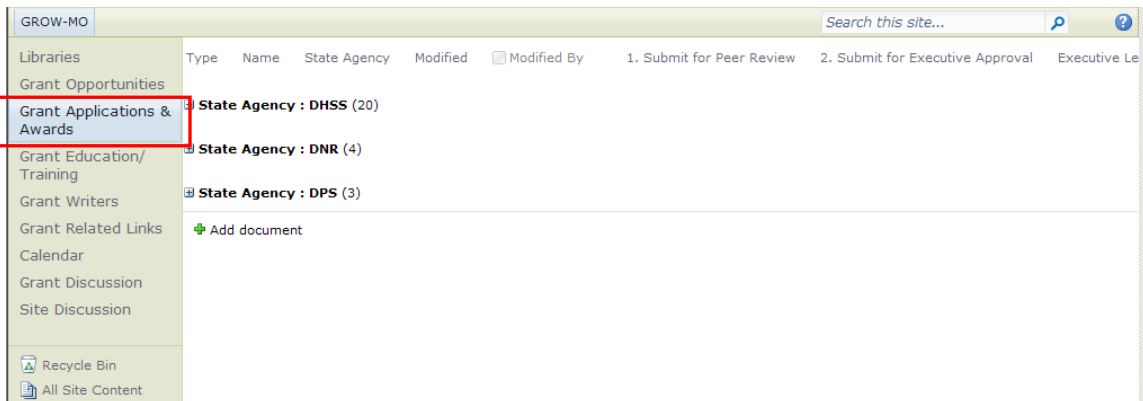
Grant Opportunities:

This page is where any site user can post grant opportunities. Competitive Grant Updates from FFIS will be posted here regularly. To share an opportunity simply select add document and upload.



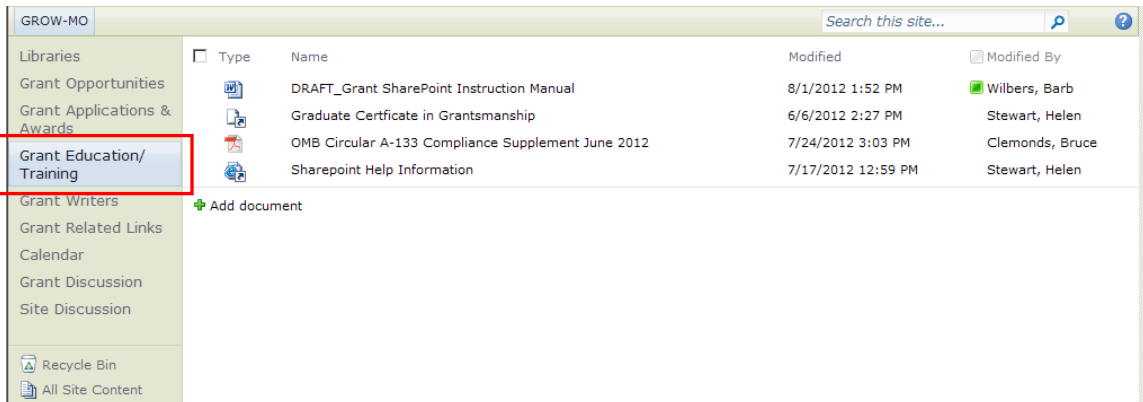
Grant Applications & Awards:

This is where you will upload all of your grant applications for review and storage.



Grant Education/Training:

This is where you will be able to find educational opportunities to enhance your grant writing capabilities.



Grant Writers:

Each agency will be asked to identify their grant writers and add them to this list. This list will be used for peer review selection. You can easily find grant writers in other agencies using this list.

Name	Work Phone	Agency	Email
Clemonds, Bruce	573-522-6125	Department of Public Safety, Office of Homeland Security	bruce.clemonds@dps.mo.gov
Hines, Laurie	573-751-1358	DHSS	laurie.hines@health.mo.gov
Beetem, Jane	573-522-2401	DNR	Jane.Beetem@dnr.mo.gov
Stout, Robert	573-751-7402	DNR	Robert.Stout@dnr.mo.gov
Phillips, Lola	573-751-6444	DHSS	Lola.Phillips@dhss.mo.gov
Brenneke, Lori	573-751-6446	DHSS	Lori.Brenneke@dhss.mo.gov
Pruitt, Jim	573-522-2844	DHSS	Jim.Pruitt@health.mo.gov
Petersen, Robert	573-751-0162	DHSS	robert.petersen@health.mo.gov
Closson, Kay	573-751-6486	Department of Health and Senior Services	kay.closson@health.mo.gov
Vandyne, Tuck	573-526-0459	DHSS	tuck.vandyne@health.mo.gov

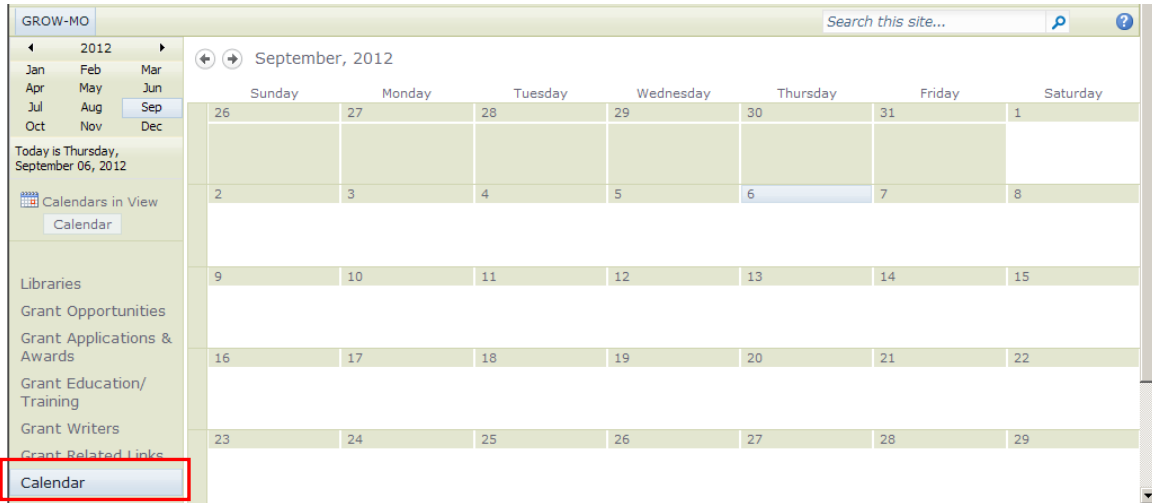
Grant Related Links:

This page will contain related links. You can add links to your favorite granting agencies here.

URL	Name
YSA Grant Alerts	
Grants.gov	
+ Add new link	

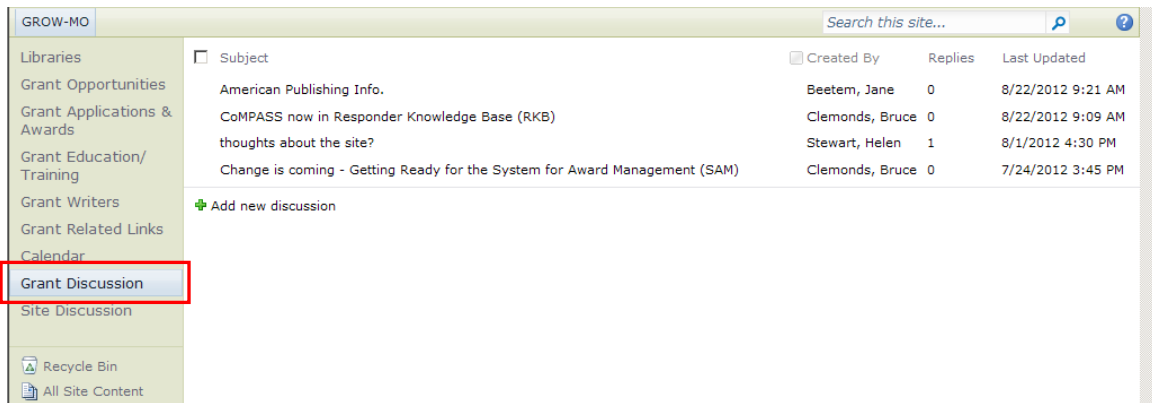
Calendar:

You can use the calendar to log important due dates.



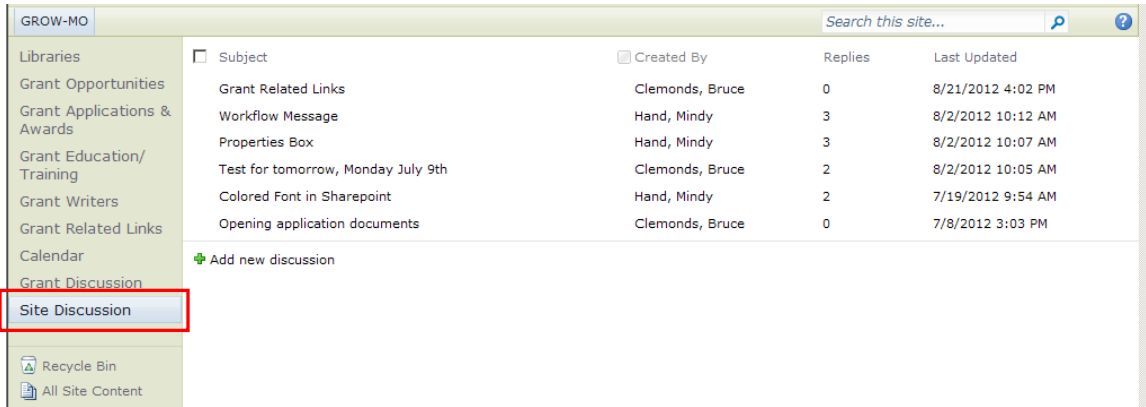
Grant Discussion:

You can use this discussion board to ask questions and share ideas with your grant writer colleagues.



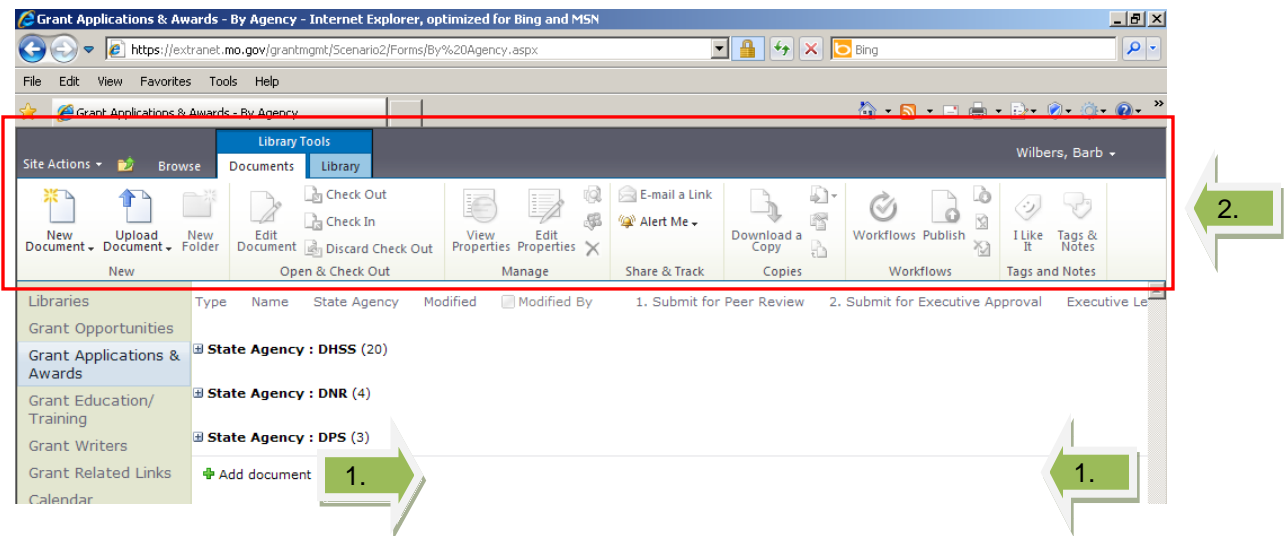
Site Discussion:

This discussion board will be used to facilitate suggestions for improvement to the site.

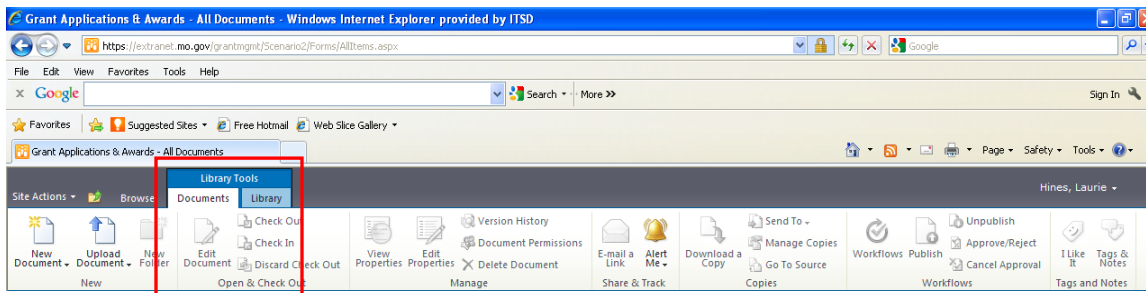


7. Uploading a Grant Application and Creating a Document Set

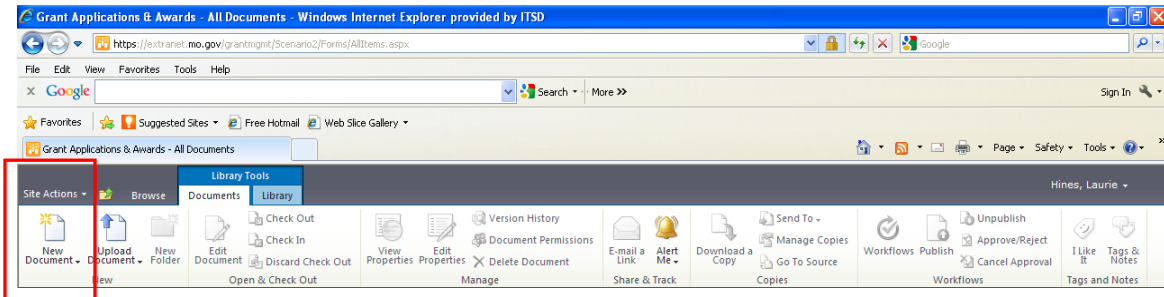
After selecting Grant Applications & Awards under Libraries, click in the whitespace next to 'Add document' (see arrow 1.) to open the menu ribbon (see arrow 2.).



You will then start by creating a Document Set for your grant application by selecting the Document tab (if not already selected).

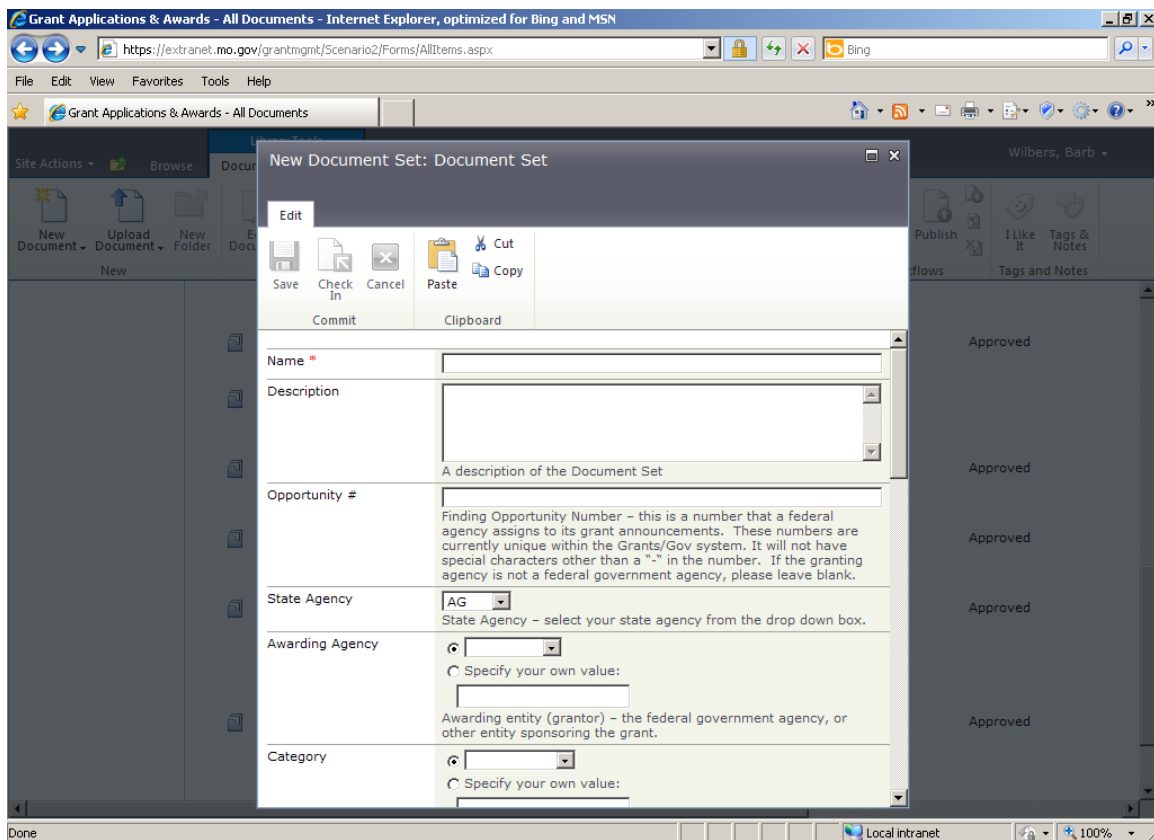


Select the dropdown arrow next to **New Document** button and select **Document Set**.



When you first create it, your Document Set will open itself (see below). You need to complete all of the fields. Please note on the contact name field, you must use **last name, first name**. Once all information is entered click 'OK'.

(Laurie to added more)



After selecting 'OK', you should receive the following screen:

The screenshot shows a web browser window displaying a SharePoint site. The address bar shows the URL: <https://extranet.mo.gov/grantmgmt/Scenario2/Forms/Document%20Set/docsethomepage.aspx?ID=1038>. The page title is "Adult Viral Hepatitis Prevention and Surveillance".

The interface includes a top navigation bar with "Site Actions", "Browse", "Page", "Library Tools" (Documents, Library), and "Document Set" (Manage). Below this is a ribbon with various actions like "New Document", "Upload Document", "New Folder", "Edit Document", "Check Out", "Check In", "Discard Check Out", "View Properties", "Edit Properties", "Alert Me", "Download a Copy", "Workflows Publish", "I Like It", and "Tags & Notes".

On the left, there is a "Libraries" sidebar with links to "Grant Opportunities", "Grant Applications & Awards", "Grant Education/ Training", "Grant Writers", "Grant Related Links", "Calendar", "Grant Discussion", and "Site Discussion".

The main content area features a document icon and the following text:

Here you will upload your application or other documentation related to this grant opportunity by selecting the Documents tabs above and then selecting the Upload Document button above. To begin a Workflow on this Document Set, select the Document Set Manage tab above and then select the Workflow button and then select the appropriate workflow you wish to start.

Adult Viral Hepatitis Prevention and Surveillance

HEP C grant application

Opportunity #	CDC- RFA-PS13-1303
State Agency	DHSS
Category	Health
New/Renewal	Renewal
Awarded?	In Process
Award Amount	\$142,000.00
State Match	\$0.00
Non-state Match	\$0.00
Budget Period Beg. Date	11/1/2012
Budget Period End Date	10/31/2013
Awarding Agency	Health
Due Date	8/13/2012
Submission Date	8/13/2012
Contact Name	Palermo, Ken
Contact Number	1-6431
Notes	

At the bottom of the main content area, there are links for "View All Properties" and "Edit Properties".

You are now ready to upload your application and other documentation into your document set. Begin by selecting the **Documents** tab.

Here you will upload your application or other documentation related to this grant opportunity by selecting the Documents tabs above and then selecting the Upload Document button above. To begin a Workflow on this Document Set, select the Document Set Manage tab above and then select the Workflow button and then select the appropriate workflow you wish to start.

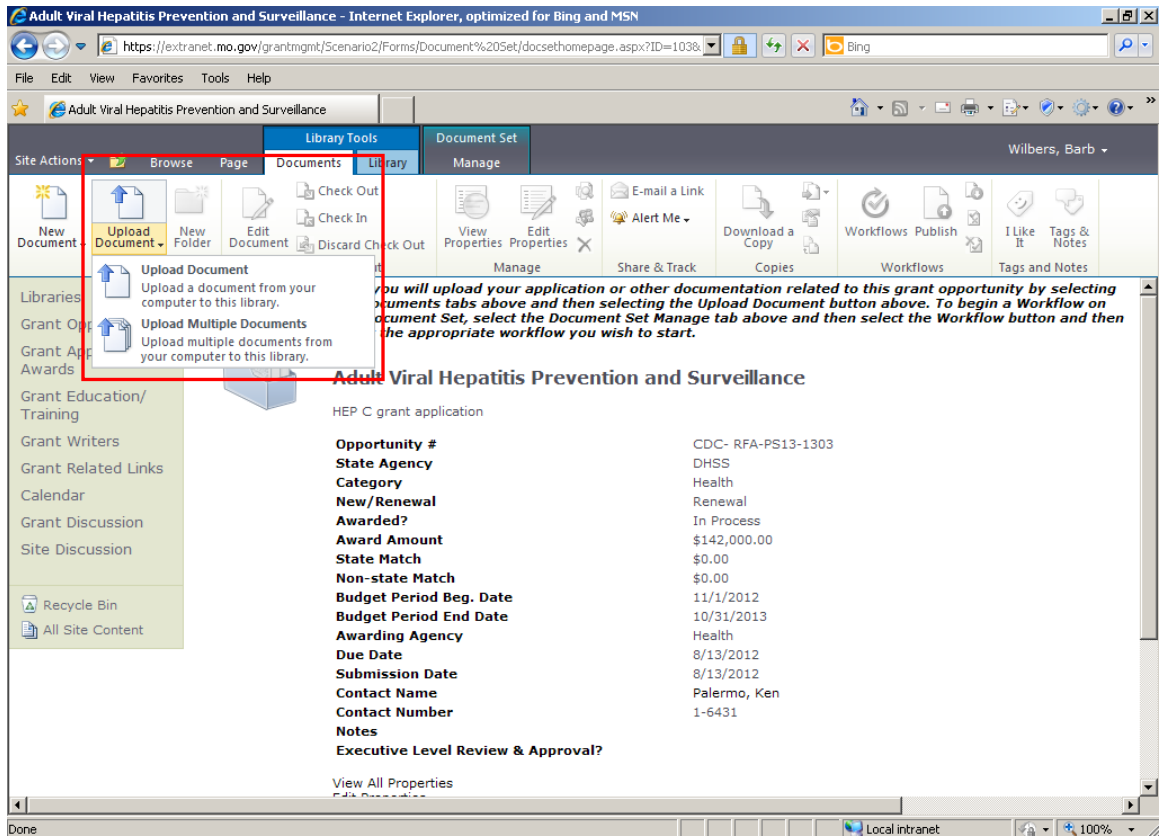
Adult Viral Hepatitis Prevention and Surveillance

HEP C grant application

Opportunity #	CDC- RFA-PS13-1303
State Agency	DHSS
Category	Health
New/Renewal	Renewal
Awarded?	In Process
Award Amount	\$142,000.00
State Match	\$0.00
Non-state Match	\$0.00
Budget Period Beg. Date	11/1/2012
Budget Period End Date	10/31/2013
Awarding Agency	Health
Due Date	8/13/2012
Submission Date	8/13/2012
Contact Name	Palermo, Ken
Contact Number	1-6431
Notes	
Executive Level Review & Approval?	

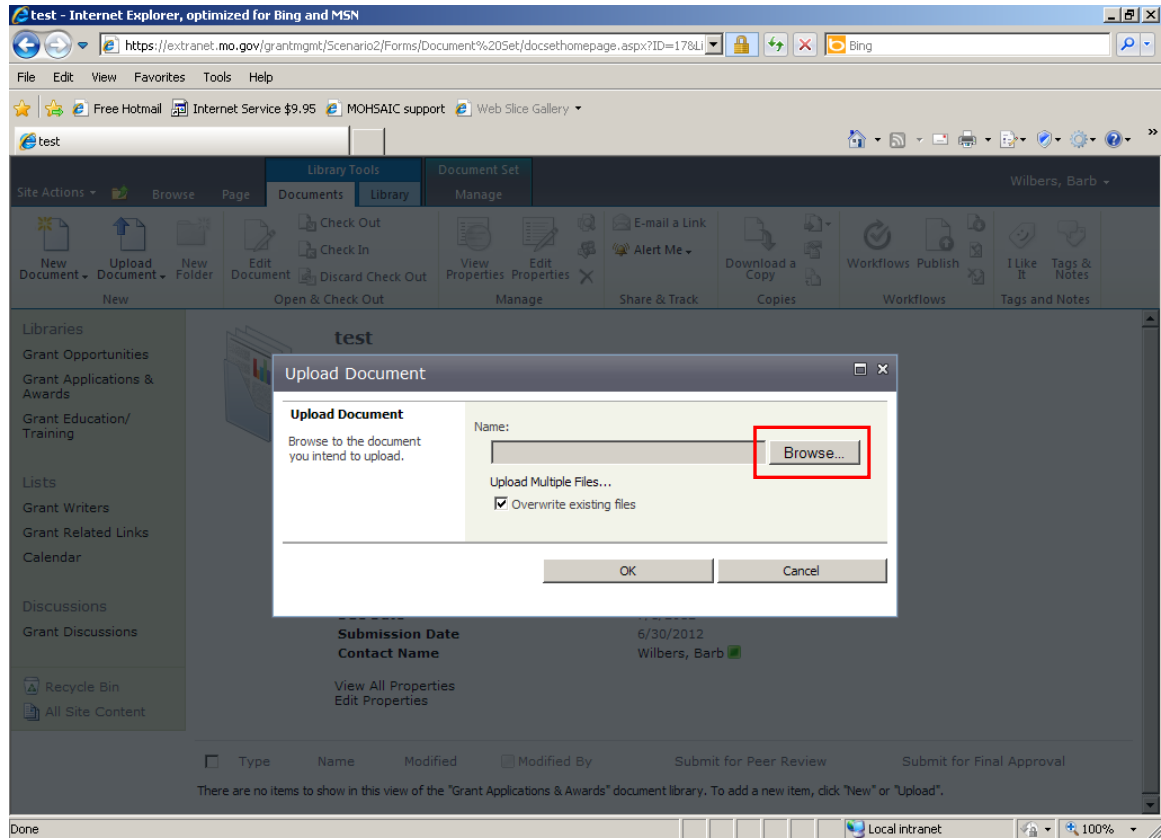
View All Properties
Edit Properties

Select the drop down arrow next to **Upload Document** and select **Upload Document** if only one document is to be uploaded or **Upload Multiple Documents** if more than one document is to be uploaded.

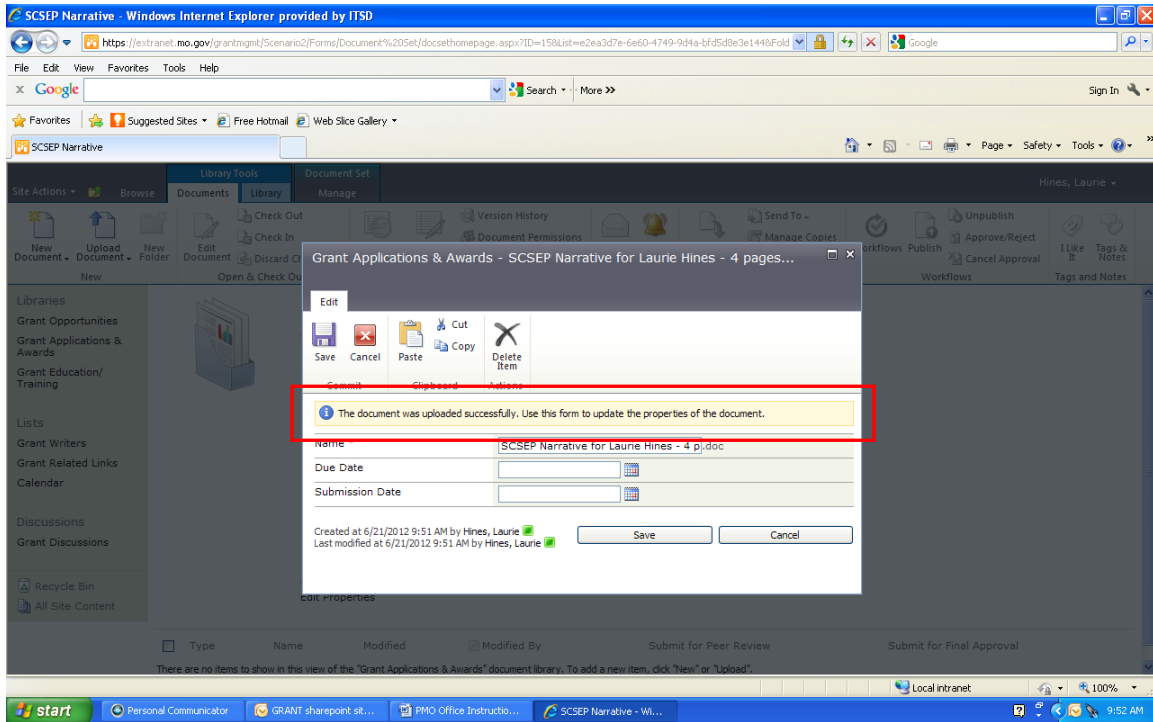


7.1 Uploading One Document

Select 'Browse' to locate the document(s) and attach. Click 'OK'.

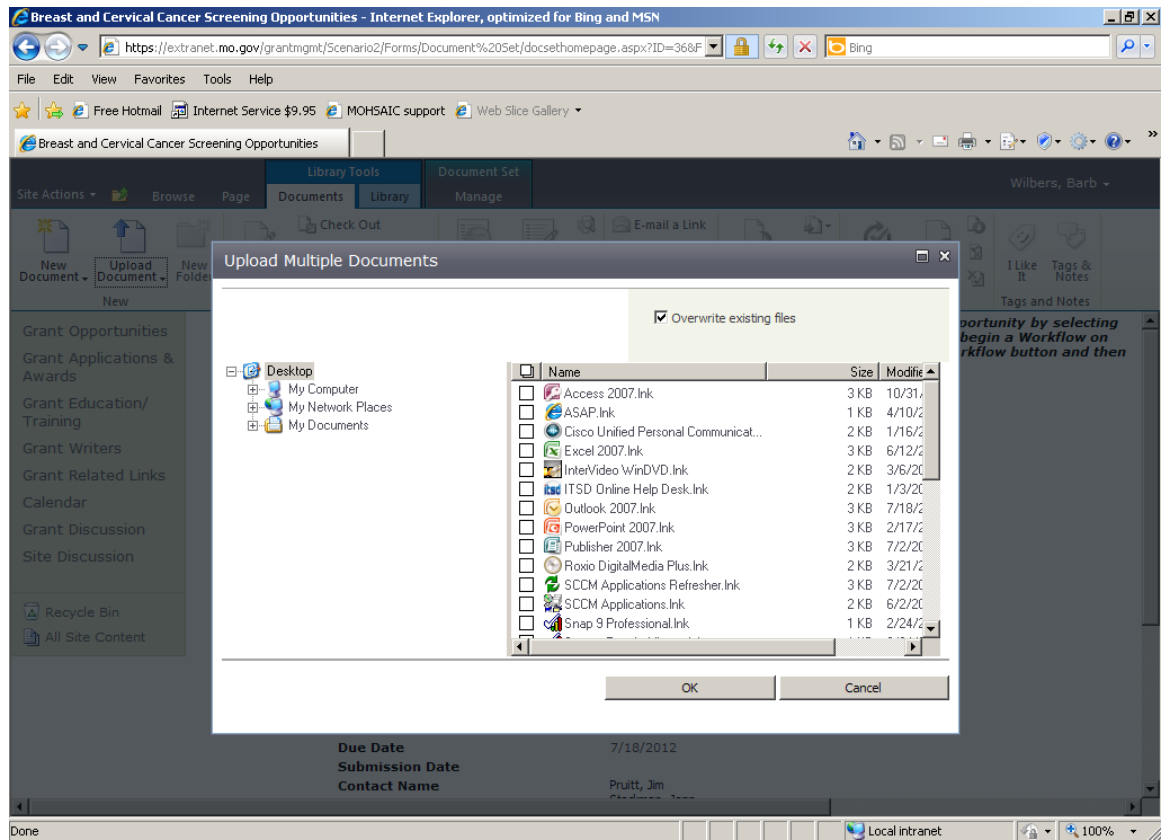


You should receive the following screen indicating that your document was uploaded successfully. Click 'Save'.

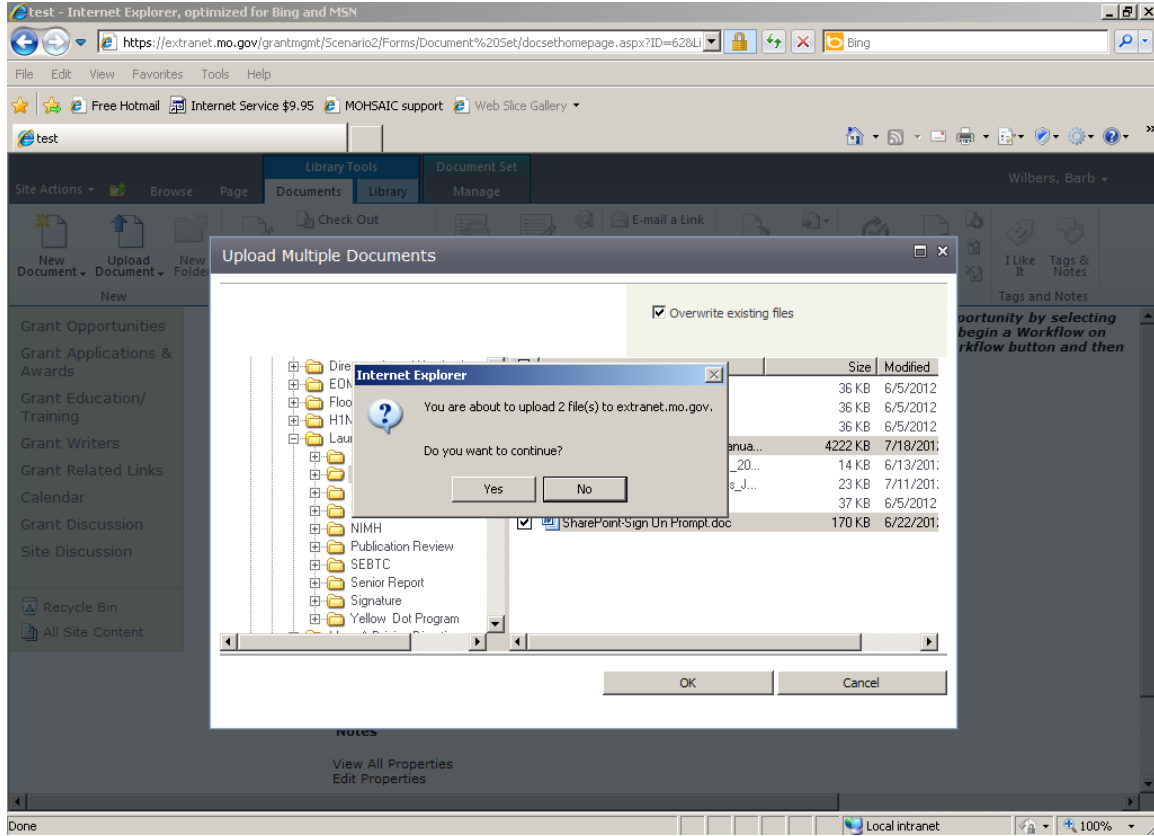


7.2 Uploading Multiple Documents

Locate all documents and select the box next to each document to be uploaded. Click 'OK'.



Screen will indicate number of documents selected to be uploaded. If correct, click 'Yes'.



NOTE: You will not receive a screen indicating your documents were uploaded successfully as you do when uploading only one document. Documents should appear on the bottom of the screen after you click 'Yes'.

8. Sending Your Grant Application for Executive Review and Approval

Once you've uploaded your grant application into the document set, you can then send the application for executive review/approval, following your agency's policy. Executive review/approval applies to grant applications that are new and that could affect or change the policies or priorities of the Administration.

Select 'Manage' tab and click on 'Workflow'.

The screenshot shows a SharePoint site titled "Adult Viral Hepatitis Prevention and Surveillance". The navigation bar includes "Site Actions", "Browse", "Page", "Documents", "Library", and "Document Set". The "Document Set" tab is active, and the "Manage" sub-tab is selected. Below the navigation bar, there are icons for "Edit Properties", "Permissions", "Delete", "E-mail a Link", "Send To", "Capture Version", "Version History", and "Workflows". The "Workflows" icon is highlighted with a red box. Below the navigation bar, there is a "Libraries" sidebar on the left and a main content area. The main content area displays a list of grant applications with the following details:

Adult Viral Hepatitis Prevention and Surveillance	
HEP C grant application	
Opportunity #	CDC- RFA-PS13-1303
State Agency	DHSS
Category	Health
New/Renewal	Renewal
Awarded?	In Process
Award Amount	\$142,000.00
State Match	\$0.00
Non-state Match	\$0.00
Budget Period Beg. Date	11/1/2012
Budget Period End Date	10/31/2013
Awarding Agency	Health
Due Date	8/13/2012
Submission Date	8/13/2012
Contact Name	Palermo, Ken
Contact Number	1-6431
Notes	
Executive Level Review & Approval?	

Click on 'Submit for Executive Approval' link to the right of this page:

Workflows - Internet Explorer, optimized for Bing and MSN

https://extranet.mo.gov/grantmgmt/_layouts/workflow.aspx?List={e2ea3d7e-6e60-4749-9d4a-bfd5d8e3...}

Site Actions Wilbers, Barb

GROW-MO > Grant Applications & Awards: Workflows: Adult Viral Hepatitis Prevention and Surveillance

Use this page to start a new workflow on the current item or to view the status of a running or completed workflow.

I Like It Tags & Notes

GROW-MO

Start a New Workflow

- 1. Submit for Peer Review
Routes a document for review. Reviewers can provide feedback, which is compiled and sent to the document owner when the workflow has completed.
- 2. Submit for Executive Approval
Routes a document for approval. Approvers can approve or reject the document, reassign the approval task, or request changes to the document.

Workflows

Select a workflow for more details on the current status or history. Show my workflows only.

Name	Started	Ended	Status
------	---------	-------	--------

Running Workflows

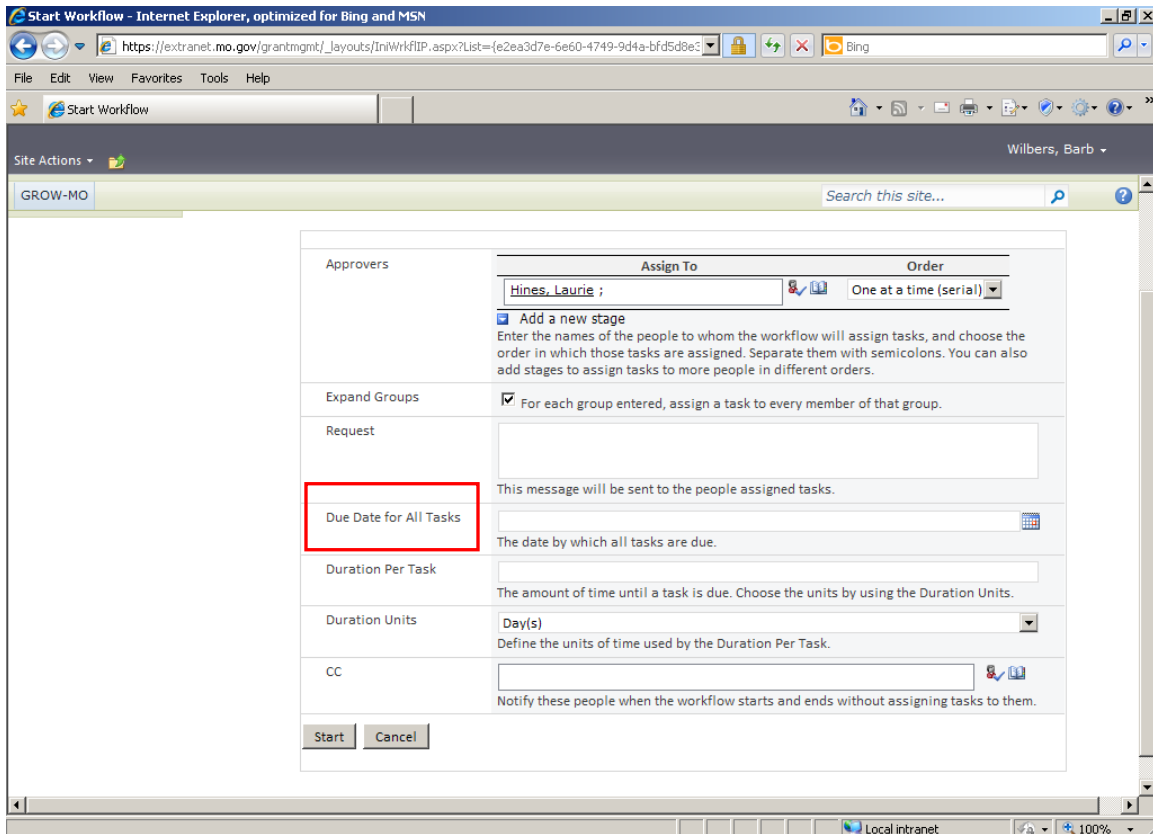
There are no currently running workflows on this item.

Completed Workflows

There are no completed workflows on this item.

Done Local intranet 100%

At a minimum, complete the 'Due Date for All Tasks' field. **Filling in the due date will trigger a daily alert to the receiver until the review and approval is complete.** Click 'Start'.



9. Sending Your Grant Application for Peer Review

Once you've uploaded your grant application into the document set you are ready to request peer review. Peer review of grant applications is an industry standard that should be adopted by every grant writer. On the home page and in the Grant Writers library, you will find the names of grant writers from various state agencies who could be asked to peer review some or all of your grant application.

Select 'Manage' tab and click on 'Workflow'.

The screenshot shows a SharePoint site titled "Adult: Viral Hepatitis Prevention and Surveillance". The ribbon is set to "Document Set" and the "Workflows" button is highlighted. Below the ribbon, there is a list of grant applications. The first application is "Adult Viral Hepatitis Prevention and Surveillance" with the following details:

Opportunity #	CDC- RFA-PS13-1303
State Agency	DHSS
Category	Health
New/Renewal	Renewal
Awarded?	In Process
Award Amount	\$142,000.00
State Match	\$0.00
Non-state Match	\$0.00
Budget Period Beg. Date	11/1/2012
Budget Period End Date	10/31/2013
Awarding Agency	Health
Due Date	8/13/2012
Submission Date	8/13/2012
Contact Name	Palermo, Ken
Contact Number	1-6431
Notes	
Executive Level Review & Approval?	

Select 'Submit for Peer Review' link to the left of this page:

Workflows - Internet Explorer, optimized for Bing and MSN

https://extranet.mo.gov/grantmgmt/_layouts/workflow.aspx?List={e2ea3d7e-6e60-4749-9d4a-bfd5d9e3...

File Edit View Favorites Tools Help

Workflows

Site Actions Wilbers, Barb

GROW-MO > Grant Applications & Awards: Workflows: Adult Viral Hepatitis Prevention and Surveillance

Use this page to start a new workflow on the current item or to view the status of a running or completed workflow.

I Like It Tags & Notes

GROW-MO

Start a New Workflow

- 1. Submit for Peer Review
Routes a document for review. Reviewers can provide feedback, which is compiled and sent to the document owner when the workflow has completed.
- 2. Submit for Executive Approval
Routes a document for approval. Approvers can approve or reject the document, reassign the approval task, or request changes to the document.

Workflows

Select a workflow for more details on the current status or history. Show my workflows only.

Name	Started	Ended	Status
------	---------	-------	--------

Running Workflows

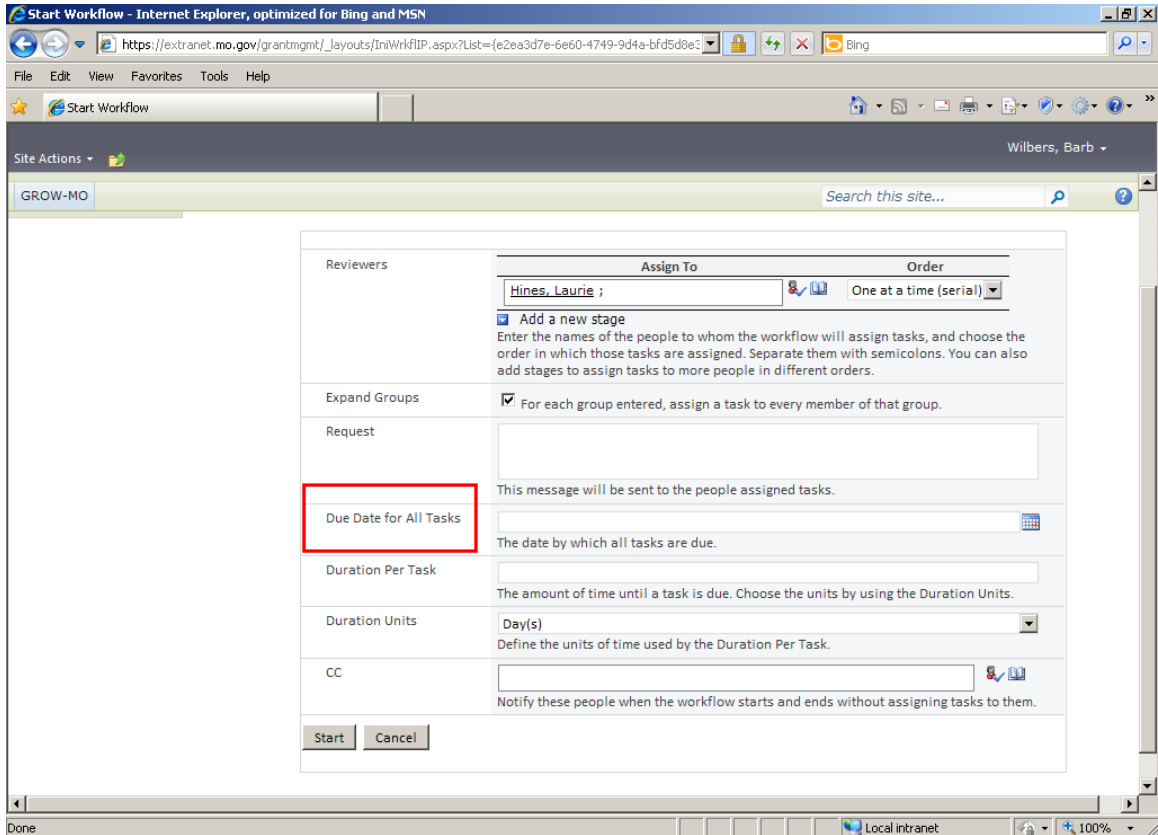
There are no currently running workflows on this item.

Completed Workflows

There are no completed workflows on this item.

Local intranet Tuesday, September 18, 2012

At a minimum, complete the fields for Reviewer(s) and Due Date. **Filling in the due date will trigger an alert to the reviewer daily until the review is complete.** *NOTE: If you wish to include someone as a cc: those listed in the cc: field will be notified when the workflow starts and ends without assigning tasks to them.* Click 'Start'.

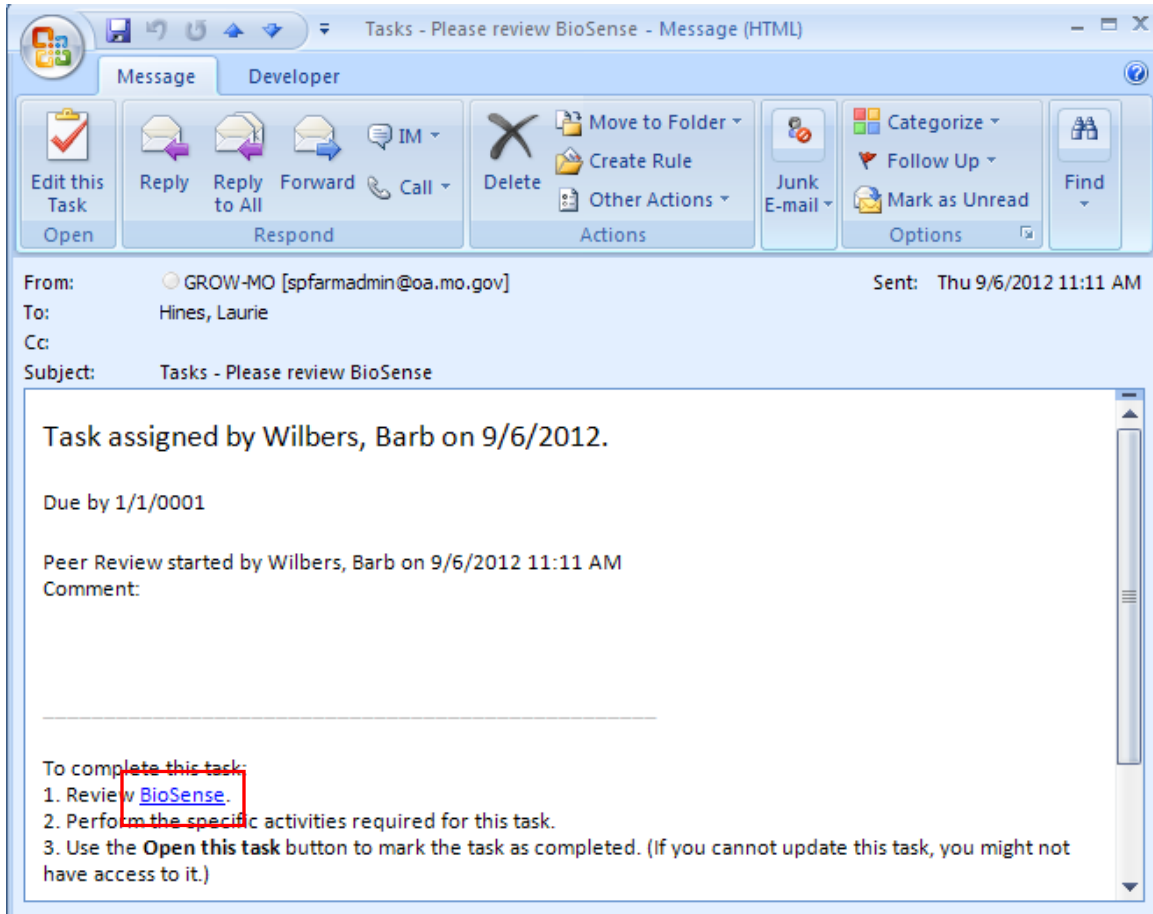


This is the email you will receive when you have submitted an application for peer review.

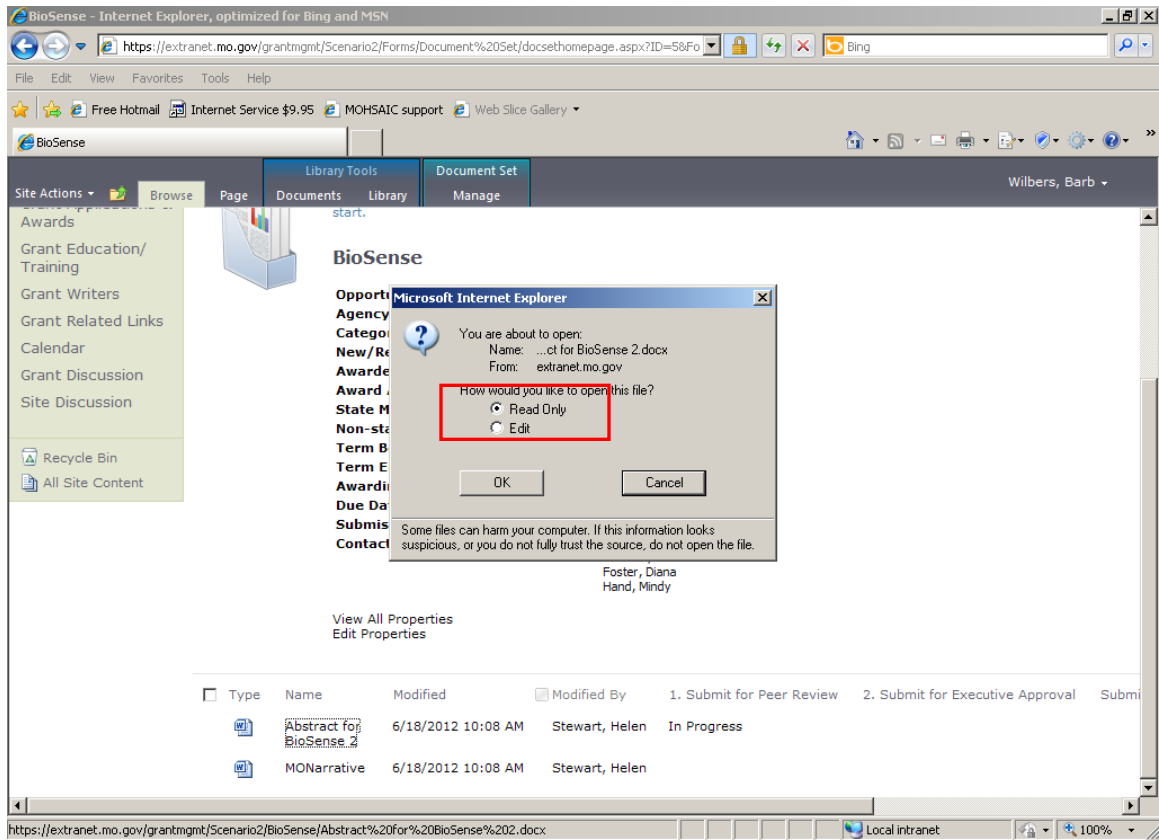


Please note that you can always click on the link 'View the status of this workflow' at the bottom of the email to track the status.

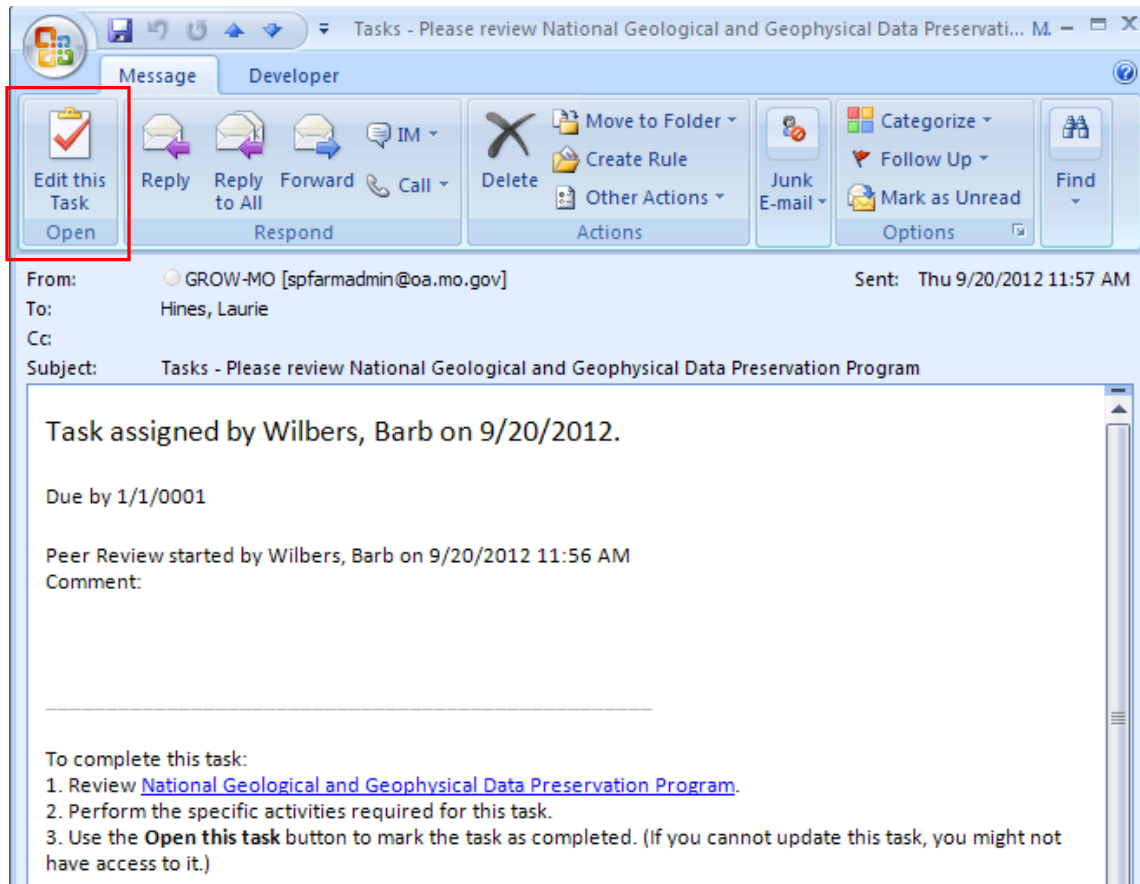
This is the email the peer will receive requesting review. In order to complete peer review, click on the grant name at the bottom of the email to go directly to the document(s) to be reviewed.



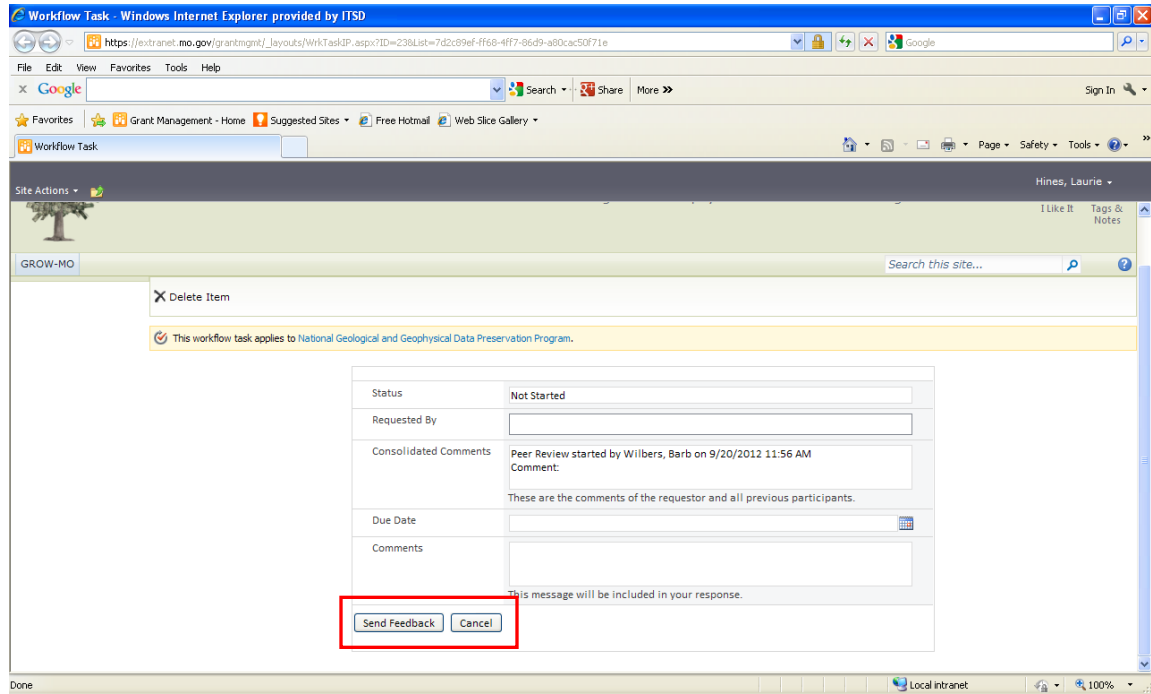
NOTE FOR PEER REVIEWER: When opening a document for review, check 'Read Only' (if not already defaulted to read only).



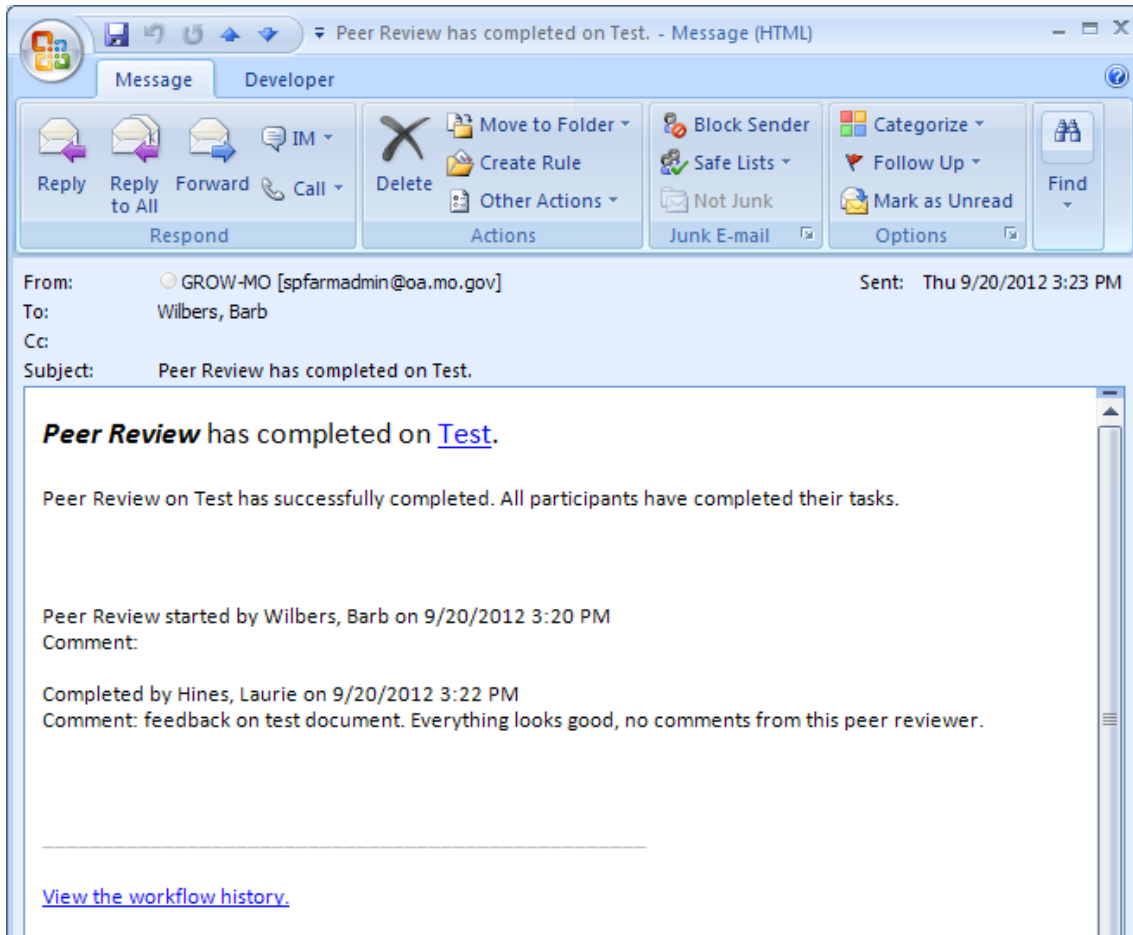
After you have reviewed the document(s), return to the original email and click on the 'Edit this Task' button on the upper left of the screen.



The Peer Reviewer will be taken to the following screen and has the option to send feedback or cancel.



Once the Peer Reviewer clicks on 'Send Feedback', both the reviewer and grant writer will receive an email confirmation.



10. How to Update a Document Set to Show Final Status or to make changes

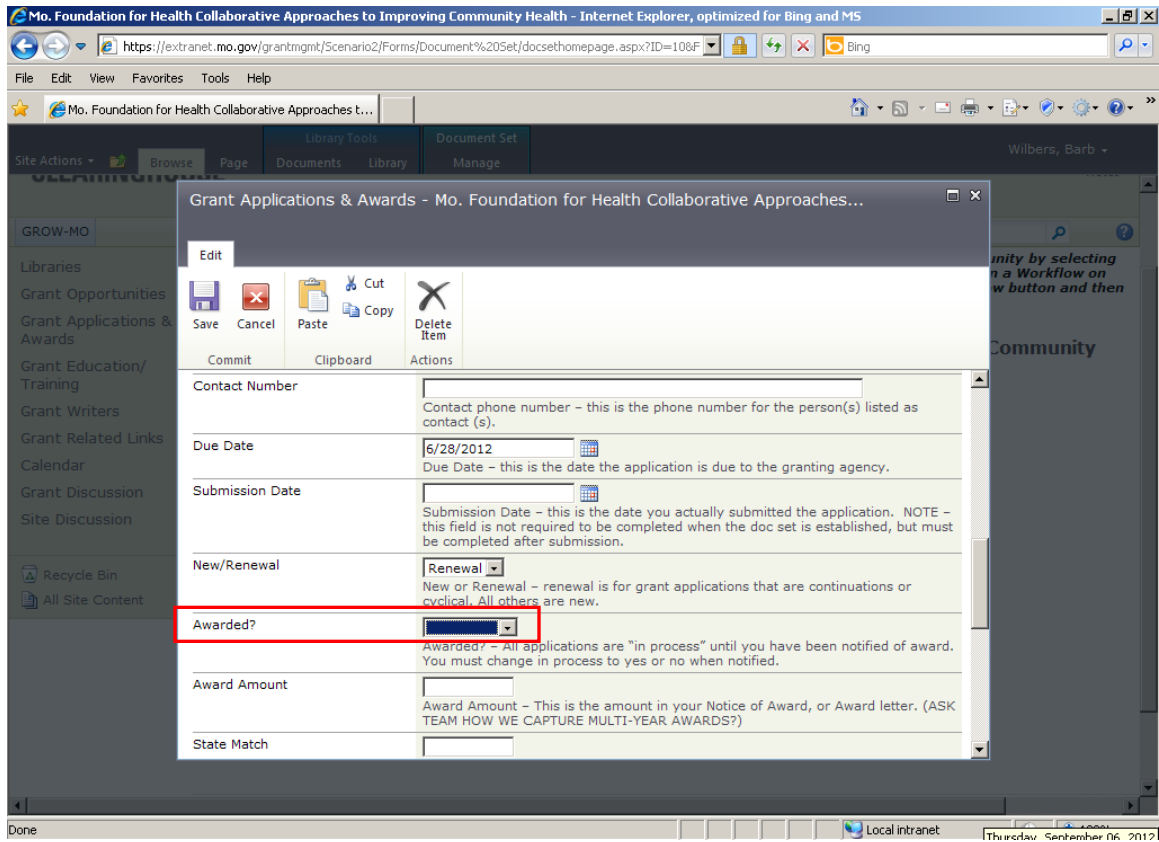
Open document set and select 'Edit Properties' at the bottom of the page.

The screenshot shows a SharePoint document set page. The browser title is "Adult Viral Hepatitis Prevention and Surveillance - Internet Explorer, optimized for Bing and MSN". The address bar shows the URL: "https://extranet.mo.gov/grantmgmt/Scenario2/Forms/Document%20Set/docsethomepage.aspx?ID=1038". The page has a navigation bar with "Site Actions", "Browse", "Page", "Documents", "Library", and "Document Set" tabs. The "Document Set" tab is selected, and the "Manage" sub-tab is active. The page content includes a sidebar with "Libraries" and "Recycle Bin" options. The main content area displays a document set titled "Adult Viral Hepatitis Prevention and Surveillance" with a description: "Here you will upload your application or other documentation related to this grant opportunity by selecting the Documents tabs above and then selecting the Upload Document button above. To begin a Workflow on this Document Set, select the Document Set Manage tab above and then select the Workflow button and then select the appropriate workflow you wish to start." Below the description is a table of properties for a grant application:

HEP C grant application	
Opportunity #	CDC- RFA-PS13-1303
State Agency	DHSS
Category	Health
New/Renewal	Renewal
Awarded?	In Process
Award Amount	\$142,000.00
State Match	\$0.00
Non-state Match	\$0.00
Budget Period Beg. Date	11/1/2012
Budget Period End Date	10/31/2013
Awarding Agency	Health
Due Date	8/13/2012
Submission Date	8/13/2012
Contact Name	Palermo, Ken
Contact Number	1-6431
Notes	
Executive Level Review & Approval?	

At the bottom of the page, there are two buttons: "View All Properties" and "Edit Properties". The "Edit Properties" button is highlighted with a red box.

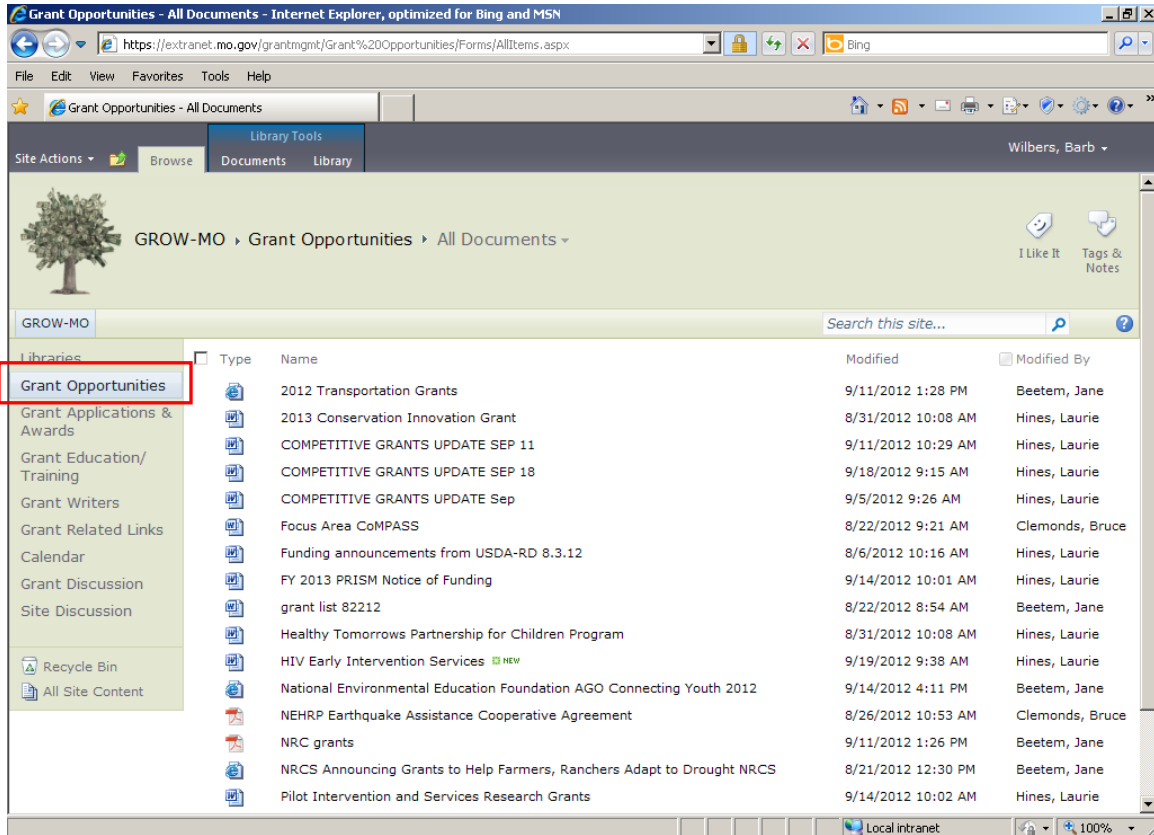
Select drop down arrow next to 'Awarded?' and select yes or no. Please complete any other relevant fields.



11. Setting Up Personal Alerts

Alerts inform you about updates and allow you to customize how much information you receive. Alerts come in e-mail, at the interval you specify, and let you know when specific items change. For example, if you want to know each time someone adds new files to a library you can create an alert for yourself.

Alerts can be set up on individual libraries or at the level of a grant application. To set up an alert on an individual library, for example, in order to know when a new grant opportunity has been uploaded, click on 'Grant Opportunities'.



Click on 'Library' on the menu ribbon at the top of the screen.

The screenshot shows a SharePoint web page titled 'Grant Opportunities - All Documents'. The ribbon at the top has the 'Library' tab selected. Below the ribbon, there are several toolbars including 'View Format', 'Datashheet', 'New Row', 'Create View', 'Modify View', 'Current View', 'E-mail a Link', 'Alert Me', 'RSS Feed', 'Share & Track', 'Connect & Export', 'Customize Library', and 'Settings'. The main content area displays a table of grant entries.

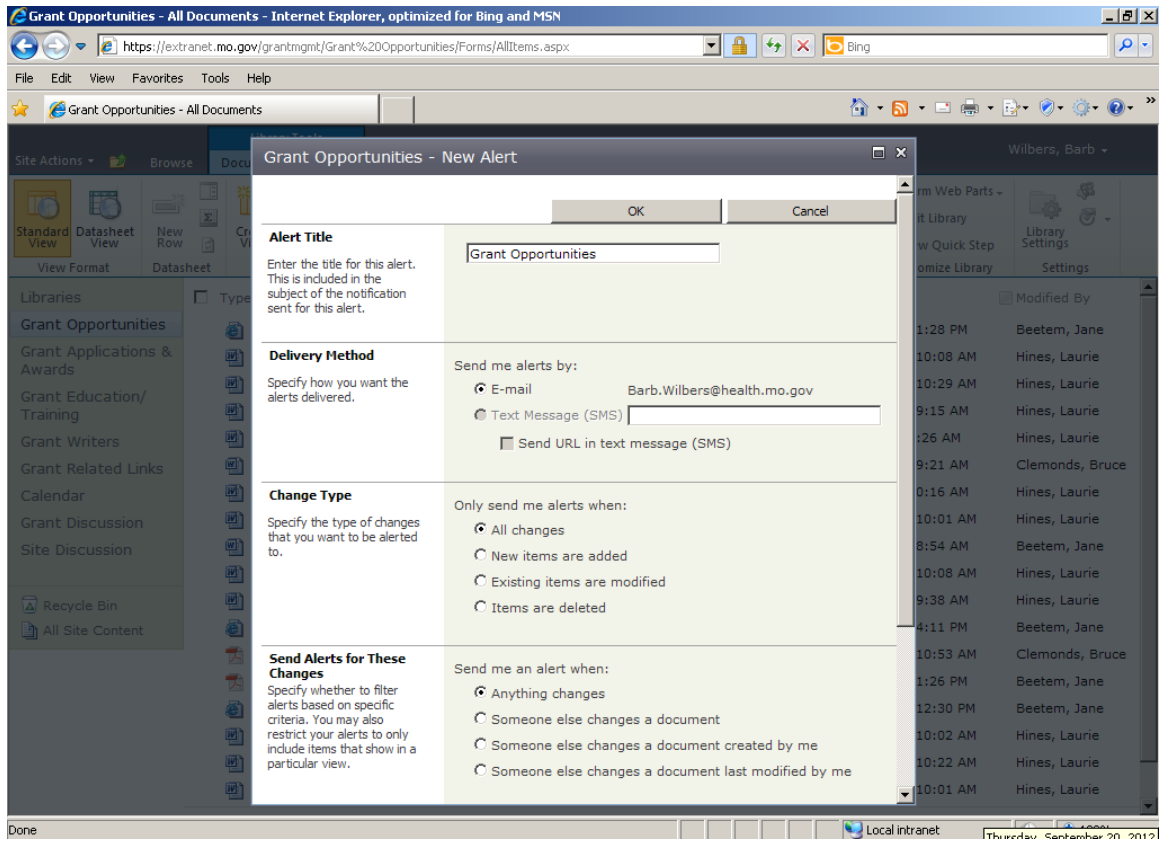
Type	Name	Modified	Modified By
	2012 Transportation Grants	9/11/2012 1:28 PM	Beetem, Jane
	2013 Conservation Innovation Grant	8/31/2012 10:08 AM	Hines, Laurie
	COMPETITIVE GRANTS UPDATE SEP 11	9/11/2012 10:29 AM	Hines, Laurie
	COMPETITIVE GRANTS UPDATE SEP 18	9/18/2012 9:15 AM	Hines, Laurie
	COMPETITIVE GRANTS UPDATE Sep	9/5/2012 9:26 AM	Hines, Laurie
	Focus Area CoPASS	8/22/2012 9:21 AM	Clemonds, Bruce
	Funding announcements from USDA-RD 8.3.12	8/6/2012 10:16 AM	Hines, Laurie
	FY 2013 PRISM Notice of Funding	9/14/2012 10:01 AM	Hines, Laurie
	grant list 82212	8/22/2012 8:54 AM	Beetem, Jane
	Healthy Tomorrows Partnership for Children Program	8/31/2012 10:08 AM	Hines, Laurie
	HIV Early Intervention Services <small>NEW</small>	9/19/2012 9:38 AM	Hines, Laurie
	National Environmental Education Foundation AGO Connecting Youth 2012	9/14/2012 4:11 PM	Beetem, Jane
	NEHRP Earthquake Assistance Cooperative Agreement	8/26/2012 10:53 AM	Clemonds, Bruce
	NRC grants	9/11/2012 1:26 PM	Beetem, Jane
	NRCS Announcing Grants to Help Farmers, Ranchers Adapt to Drought NRCS	8/21/2012 12:30 PM	Beetem, Jane
	Pilot Intervention and Services Research Grants	9/14/2012 10:02 AM	Hines, Laurie
	Rural Health Network Development Planning Program	8/31/2012 10:22 AM	Hines, Laurie
	Service Area Competition	9/14/2012 10:01 AM	Hines, Laurie

Click on drop down arrow next to 'Alert Me' and select 'Set alert on this library'.

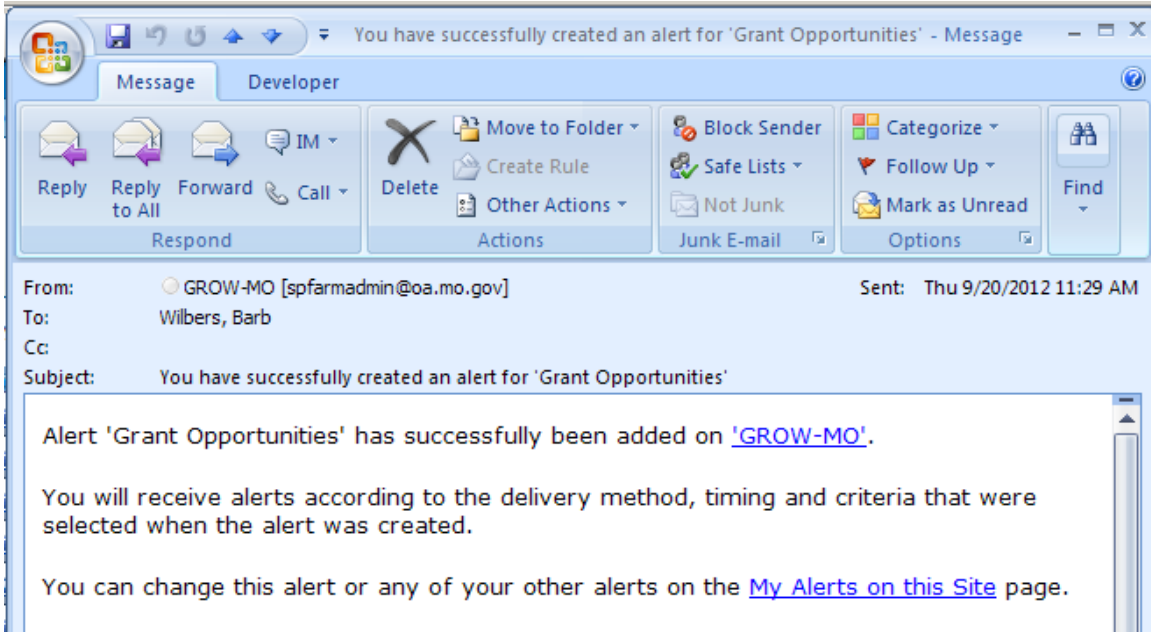
The screenshot shows a SharePoint site titled 'Grant Opportunities - All Documents'. The 'Library Tools' ribbon is active, and the 'Alert Me' dropdown menu is open, with 'Set alert on this library' highlighted. The main content area displays a list of documents with columns for Name, Modified, and Modified By.

Type	Name	Modified	Modified By
	2012 Transportation Grants	9/11/2012 1:28 PM	Beetem, Jane
	2013 Conservation Innovation Grant	8/31/2012 10:08 AM	Hines, Laurie
	COMPETITIVE GRANTS UPDATE SEP 11	9/11/2012 10:29 AM	Hines, Laurie
	COMPETITIVE GRANTS UPDATE SEP 18	9/18/2012 9:15 AM	Hines, Laurie
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	Focus Area CoMPASS	8/22/2012 9:21 AM	Clemonds, Bruce
	Funding announcements from USDA-RD 8.3.12	8/6/2012 10:16 AM	Hines, Laurie
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	grant list 82212	8/22/2012 8:54 AM	Beetem, Jane
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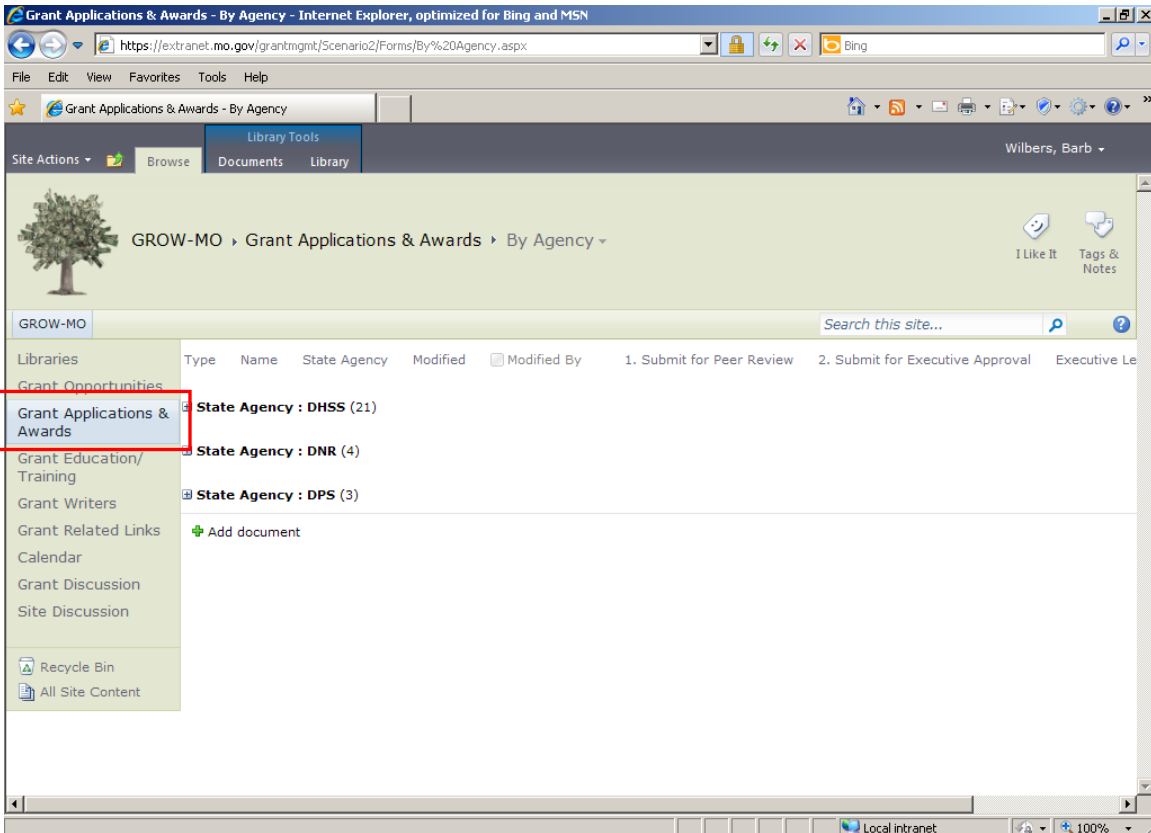
You will receive the following screen. The fields are preselected, but you can modify them to suit your preferences. Click 'OK'.



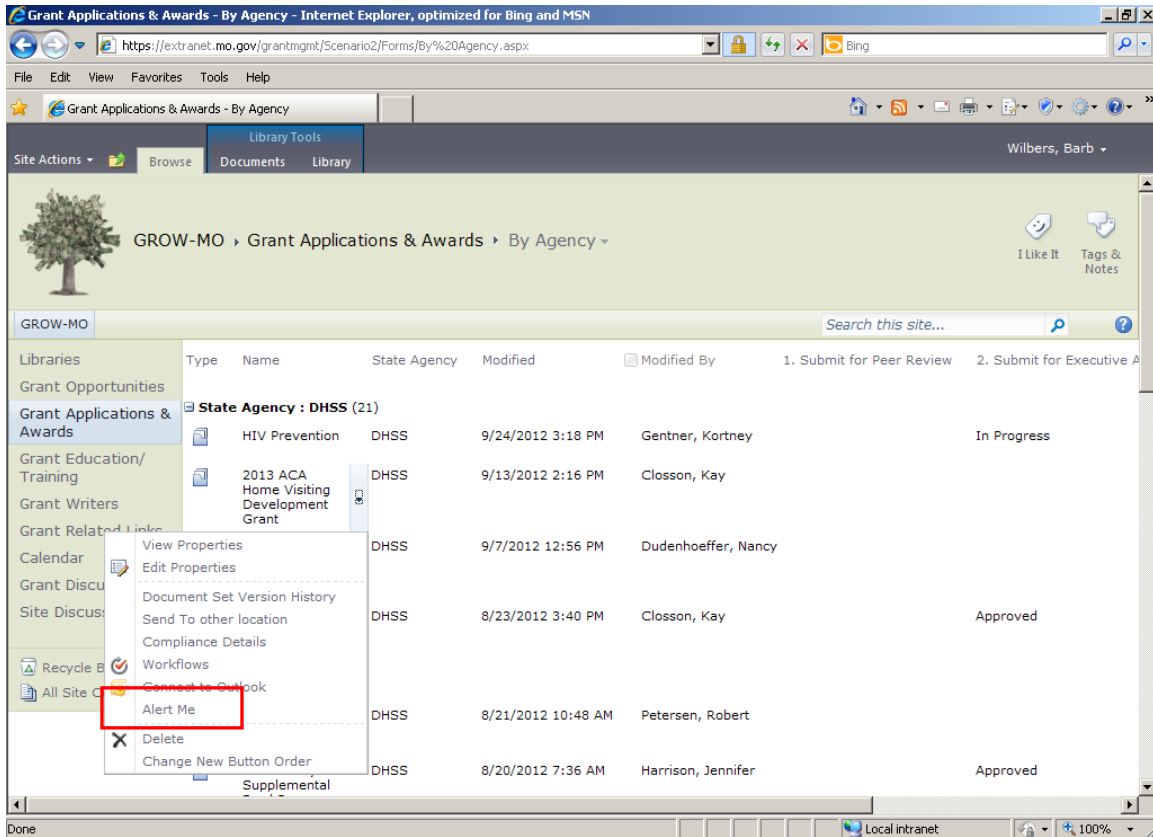
Following is the email you will receive confirming that your alert was successfully created. From now on, you will receive notification of changes to this Library.



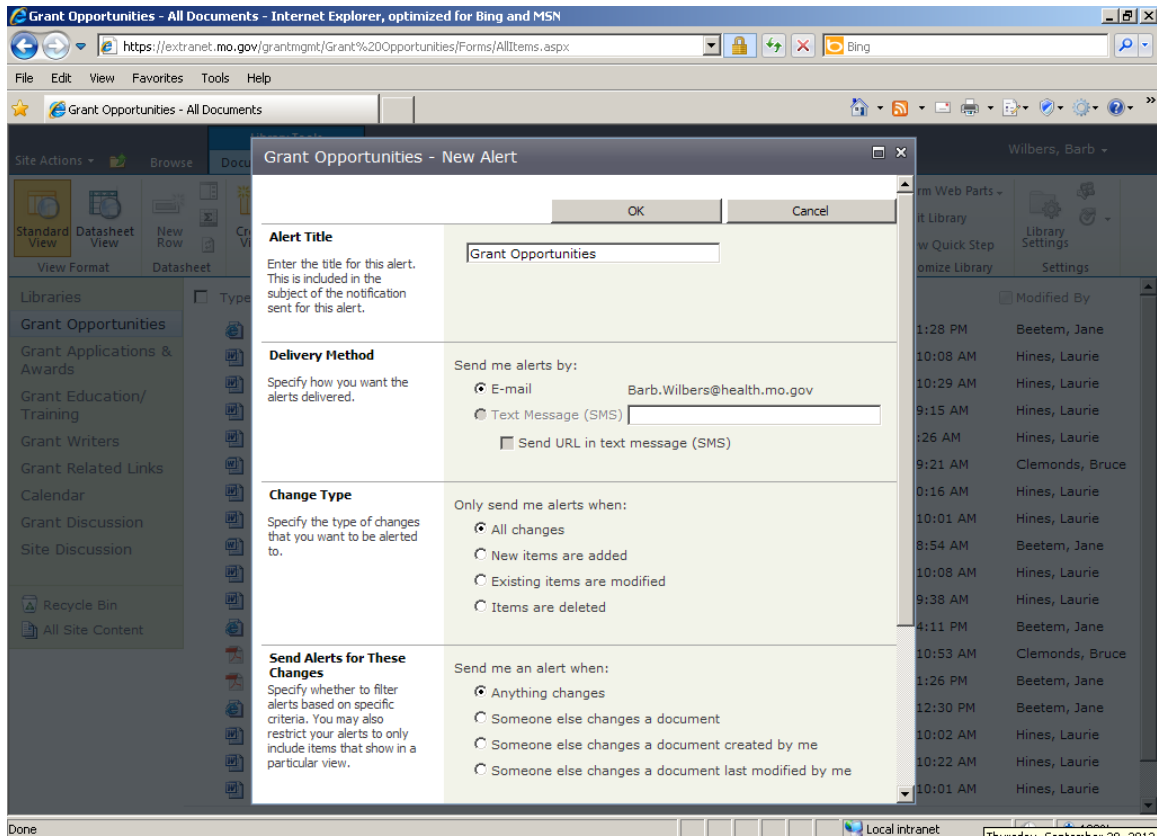
To set up an alert on a specific grant application, click on 'Grant Applications & Awards' library. To expand the list of grants under each agency, click on the '+' to the left of State Agency.



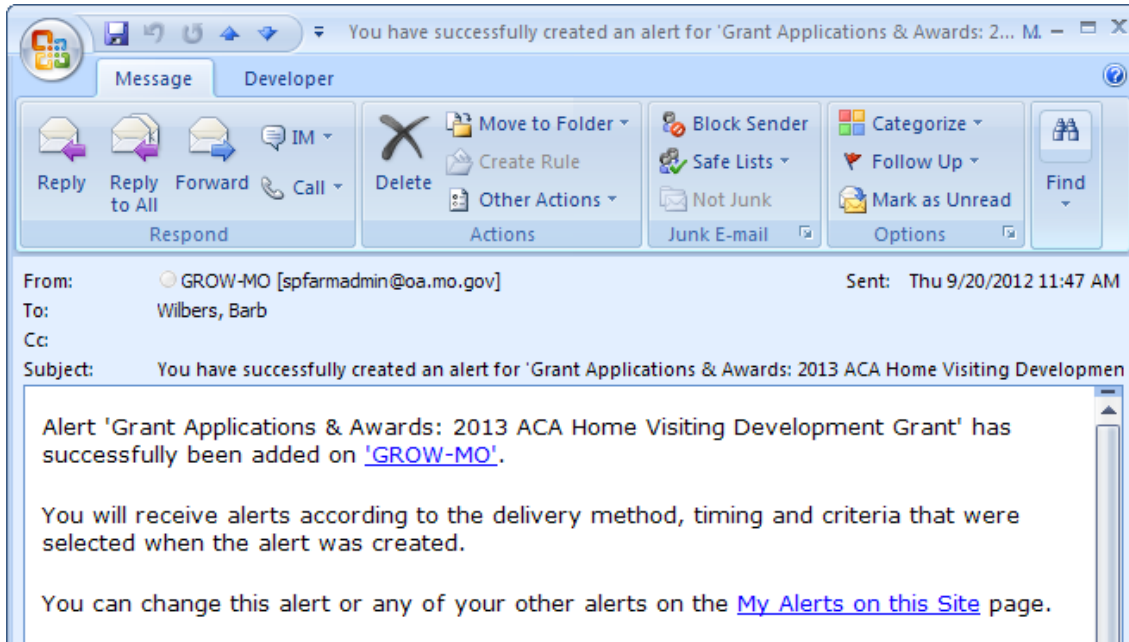
Locate the individual grant application for which you would like to set up and alert to receive notice when a change occurs. Hold your cursor over the grant application name and click on the drop down arrow and select 'Alert Me'.



You will receive the following screen. The fields are preselected, but you can modify them to suit your preferences. Click 'OK'.



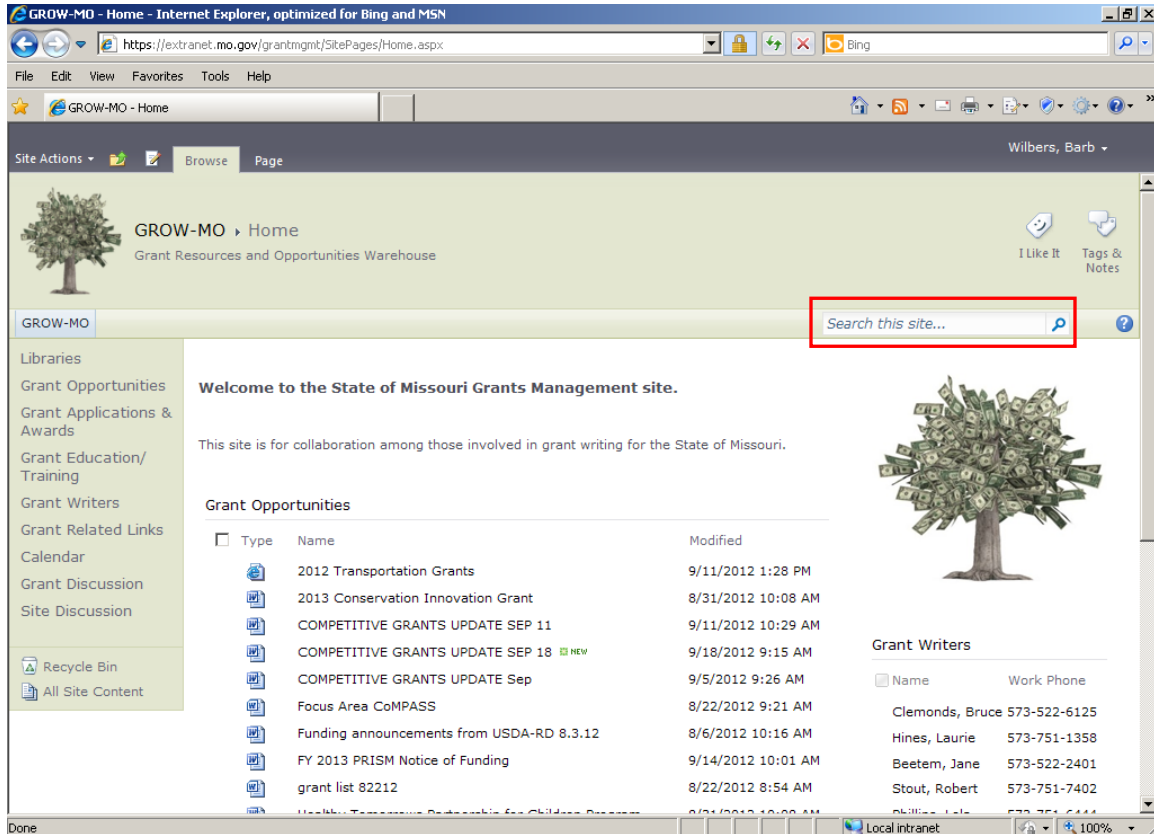
Following is the email you will receive confirming that your alert was successfully created. From now on, you will receive notification of changes to this grant application.



(Laurie to add here.)

12. Search This Site

You can use this feature to search using relevant words to find language or data used in a prior grant application for your application. Searching from the Home page will produce results from the entire SharePoint site. You can also narrow your search by searching individual libraries.



13. How to Filter

Instructions coming soon.