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komen.

Grants eManagement System (GeMS)

Affiliate Applicant User Guide
Version 2.2

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GeMS System Requirements

GeMS is designed for use by the vast majority of computer users and should require little or no changes to their computer environment. The requirements that are mentioned below are common computer elements that should be present on most machines.

GeMS is designed for the two most common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing GeMS from a Macintosh environment are required to have MacOS 7.5 or higher. Windows users are required to have an operating system that is Windows XP or higher.

GeMS is a website designed for access via the Internet. For purposes of accessing GeMS, minimum connection is by modem. For those using a modem, recommended connection speed is at least 33.6 kbps (kilobits per second). Internet connections "faster" than modem, i.e., cable, DSL, T1, wireless improve speed at which the system operates.

All times in GeMS are in the Central Time Zone, as the GeMS server is located in Dallas, TX.

GeMS was designed to be compatible with common up-to-date web browsers including Internet Explorer V.7 and above, Firefox, Safari, Chrome and Opera.

By default Internet Explorer 10 in Windows 8 does not run in compatibility mode. This is easily tested by logging into GeMS. If the compatibility mode is not enabled, the progress wheel in GeMS will simply spin without ever completing an action. To enable the compatibility mode for Internet Explorer 10, follow these steps (Windows 7 users start at step 2):
1. Windows 8 only - from the Windows 8 start screen select the Desktop.
2. From the Desktop launch Internet Explorer 10.
3. Press the Alt key on your keyboard to bring up the top menu.
4. Go to Tools | Compatibility View settings
5. Add https://affiliategrants.komen.org/ to the Compatibility View websites, or
   Select Display all websites in Compatibility View.
Enabling the compatibility mode using either option in step 5 will affect all GeMS websites/pages.

Helpful Hint: If the character count is not shown under the textbox, please enable the compatibility mode

Provide written justification for all items requested in this section of the Budget
This section is required if you have requested funds for supplies.

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GeMS has a combination of both Microsoft (MS) Word and PDF documents. Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. GeMS automatically generates grant documents in PDF format using information that is saved into various narrative and budget pages. Using Adobe Acrobat Reader can view, print, or save PDF documents. Adobe Acrobat Reader can be downloaded at www.adobe.com.
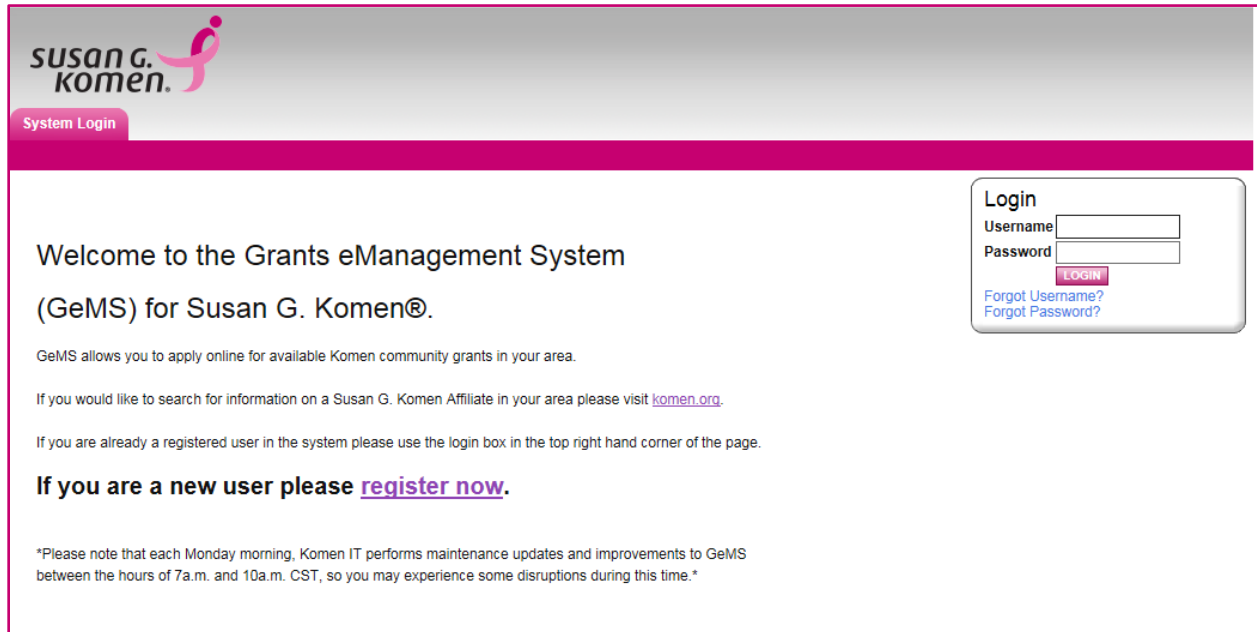
Microsoft Word increases GeMS formatting options and reduces the amount of empty space on printed pages. If MS Word is not installed, MS Word Viewer is available for download at www.microsoft.com.

GeMS Login and Registration

To access Grants eManagement System (GeMS), type "https://affiliategrants.komen.org" into the address bar of your web browser and hit "Enter."

Do not type "www."

The page you see should look like the image shown below.

General GeMS Tip: <u>ALWAYS</u> follow the steps in order as they appear in the manual.

Accessing GeMS

Welcome to GeMS! **In order to use the system you must first be granted access to it.** There is one way to gain access to GeMS – through registering and creating an account. Prior to doing so, we recommend you take some time to think through what system roles are appropriate for the individuals in your organization. **New GeMS users must register in a specific order**, therefore all GeMS users from an organization should work together to determine GeMS roles and responsibilities. **The Project Director should register first.**

GeMS User Roles

Project Director:
The role of Project Director should be assigned to the individual at your organization that will serve as the project's lead contact. This individual is responsible for validating all new users when they register for the system under their organization. This individual will have the highest level of access in the system and will be responsible for overseeing all administrative functions available, such as application creation and completion. **There can only be one Project Director per project/application.**

Authorized Signer:
The role of Authorized Signer should be assigned to the individual(s) at your organization that has the authority to sign legal documents on behalf of the organization. This individual is responsible for electronically signing the application before submission and the grant contract if the organization is awarded funds. **There can be more than one Authorized Signer per organization.** If an Authorized Signer is sometimes unavailable, it may be wise to have an additional individual with the role of Authorized Signer to serve as a backup during critical times (i.e., application submission).

Viewer:
The role of viewer should be assigned to any individual at your organization who needs access to view the organization's information, but does not need the functionality to save, add, edit or change anything within the organization's information. There can be multiple Viewers per organization.

Writer:
The role of writer should be assigned to any individual who needs access to an organization's application process to help complete the application but does not have the authority to complete the submission process. This individual cannot change the status of an application and will not have administrative function availability. There can be multiple Writers per organization.

Helpful Hint:

- The Project Director must be the first individual at an organization to register.
- The Project Director will then approve all subsequent users from their organization.
- The Authorized Signer should register and be validated/approved by the Project Director prior to the creation of the organization's first application.
- **An organization can have multiple Project Directors but only one Project Director per application** (this may be a need for large health systems and universities).
    - o The organization will need to use the "Add/Edit People" tool to ensure the Project Directors are attached to the correct application.

Creating a New Account

1) From the GeMS homepage, click the "Register Now" link located towards the bottom of the homepage.

2) Complete the Registration form in its entirety. Once a user has created an account and has gained access to the system, they will never have to request access again. There is no need for multiple accounts within GeMS, unless applying to multiple Affiliates.

    a) Fill in all information as required. All items marked with an '*' are required to create your account.

    b) **If a question has a pink "GO" button next to it when completing a question, you <u>MUST</u> select the "GO" button and wait approximately 5 seconds before advancing to the next question.**

    c) Always select either "Applicant" or "Grantee" in the "What is your position at your Affiliate" question.

d) From the "Affiliate State" dropdown list, select the state in which the Affiliate is located.

Note: if the Affiliate serves multiple states – choose the state where the Affiliate main office is located. Check with the Affiliate if you are unsure.

e) From the "Affiliate" dropdown list, select the name of the Affiliate from which the organization is seeking grant funds.

f) From the "Organization" dropdown list, select your organization's name and click GO.

If your organization does not appear in the dropdown list, please choose "Other" in the Organization drop down list. If you choose "Other," you will be required to complete the Organization Registration section during your registration.

ONLY NEW APPLICANTS USING GeMS FOR THE FIRST TIME SHOULD SELECT "OTHER."

g) The "Username" field must consist of all letters and numbers, minimum length 5 characters, maximum length 20 characters
h) The "Password" field must consist of all letters and numbers, minimum length 7 characters, maximum length 20 characters
i) The fields "Password" and "Confirm Password" must be the same.

Helpful Hint:
Please confirm with your Project Director the correct name of your organization as it is listed in GeMS prior to making your selection in the "Organization" field.

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3) If your organization does not appear in the "Organization" dropdown list and you select "Other" in the drop down list, you will be required to complete the Organization Registration section during your registration. **All fields must be completed on the following form if you choose "Other."**

4) Click "Save" in the upper right hand corner to save the data.

Having saved your contact information, your account must then be approved before you can access the system. If you attempt to access the system prior to getting approved/validated, you will receive the following message:


You will receive an email notification when your registration has been submitted for approval and, when access has been granted, you will receive an email message confirming your account has been validated.

Project Directors will be approved/validated by an Affiliate representative and all other users will be approved/validated by the organization's Project Director.

Validating Users

In order for all users within an organization to be approved/validated, the <u>Project Director</u> <u>must</u> follow the steps listed below.

1) The Project Director will receive an email when a user within their organization has registered and needs to be validated.

2) The Project Director logs in to GeMS and will select the "My Administration" tab at the top of the User Homepage.
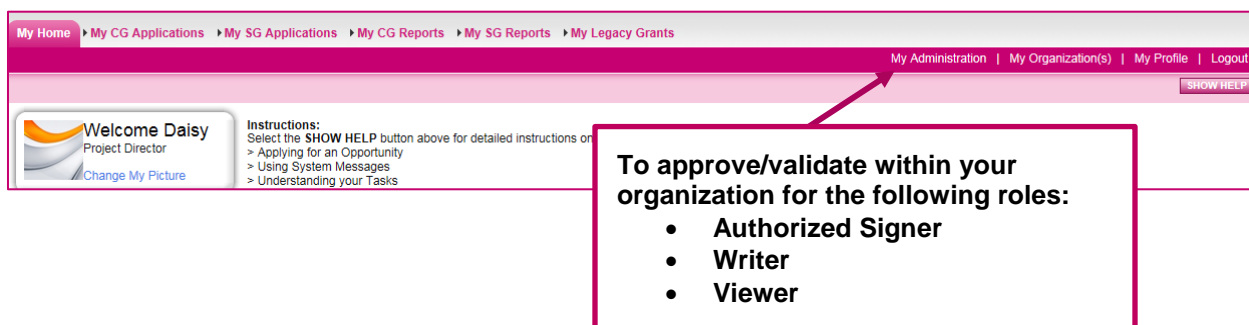
3) Select the "User Approval for Project Directors" link within the My Administration section.
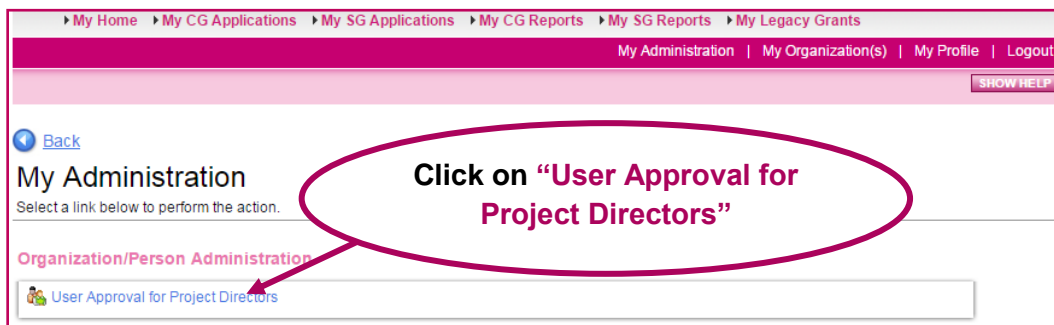
4) Once on the "Komen Project Director User Approval Page," enter the new registrant's name in the search criteria. You can also search the system for "New Users" in the "User Type" field to perform a broader search.

5) Select the pink "Search" button.

6) Scroll down to "Search Results."

7) Select the checkbox next to the user's name.

8) Select **"**Approval Type" to Approve User or Deny.

- "Approve User" – user from an existing organization
- "Deny" – users that should not be granted access to GeMS

9) Select your organization from the drop down menu.

10) Select a role for the user – "Authorized Signer," "Writer" or "Viewer."

11) The current date will appear in the "Active Date" field. You do not have to enter anything into the "Inactive Date" field unless you know the date you would like the user's access to be inactivated.

12) Select the "Approve Selected User" button to complete the user's validation/approval.
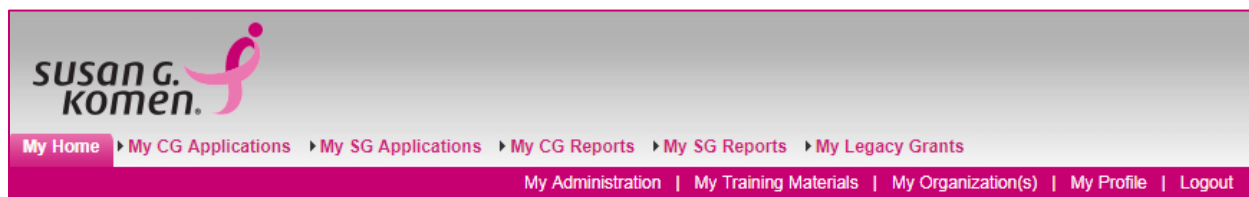

13) The new user will receive an automatic email notification telling them they have been approved in the system and can now access GeMS.

User Homepage

When a user logs into GeMS, they will land on the User Homepage. The content of the page and links across the top of the screen are described below.

Header Detail below
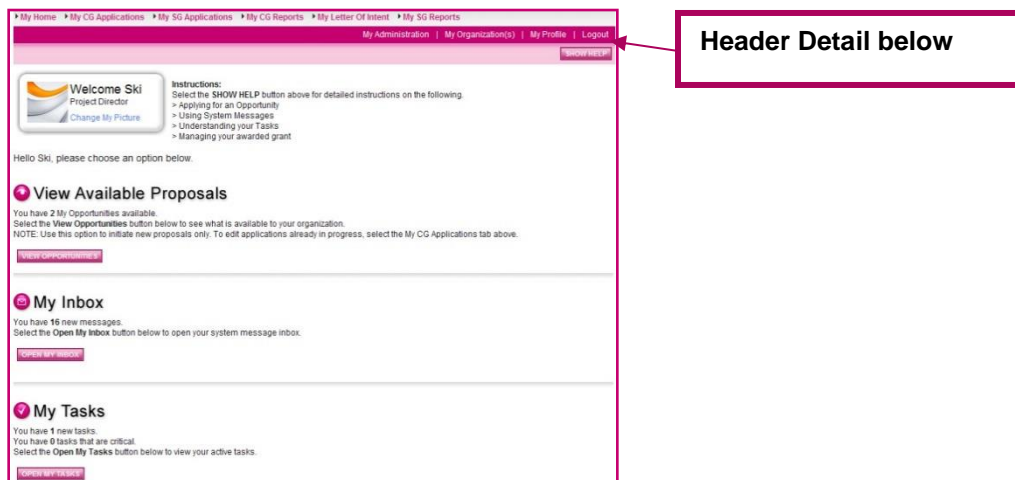
Header Detail

User Tabs

- **My Home:** Brings the user back to their homepage
- **My CG Applications:** Access to all community grant applications already in progress
- **My SG Applications:** Access to all small grant applications already in progress
- **My CG Reports:** Access to all community grant progress and final reports already in progress
- **My SG Reports:** Access to all small grant final reports already in progress
- **My Administration:** Administrator functions, user approval; this tab will only appear for authorized users
- **My Training Materials:** Link to GeMS User Manual
- **My Organization:** Current information about your organization (this information can be updated at any time by authorized users). NOTE: If the organization is awarded funding, the address on the My Organization page is where the grant check will be mailed.
- **My Profile:** Individual user information (this information can be updated at any time)
- **Logout:** Logout of the system
- **View Available Proposals:** Initiate a new grant application offered by the Affiliate
- **My Inbox:** System notifications regarding system users and application status
- **My Tasks:** List of current tasks you must complete

Automatic E-Mail Notifications

Automatic email notifications may be sent to you periodically throughout the grant year. These messages will be sent by the system according to an automatic process or as the result of a user triggered event. These messages might be triggered by the submission of an application, an application being sent for modifications, or when a pending due date is approaching. These messages are intended to help you know what is occurring in the system that pertains to you or your organization. These messages may also be sent by Komen Affiliate personnel. These messages are designed to help keep you up to date with the progress of your application while also serving as reminders when action is required on your part.

In order to receive these messages it is important you include an active, frequently used email address when creating your profile in the system. If you provide an incorrect email address or an address to an account that is either inactive or full, you will not be able to receive these important messages.

Enhanced Navigation

To move in applications requires hovering over the menu bar towards the top of the screen.

To hover over the item means to momentarily place your mouse icon over the selection and additional information will appear below.
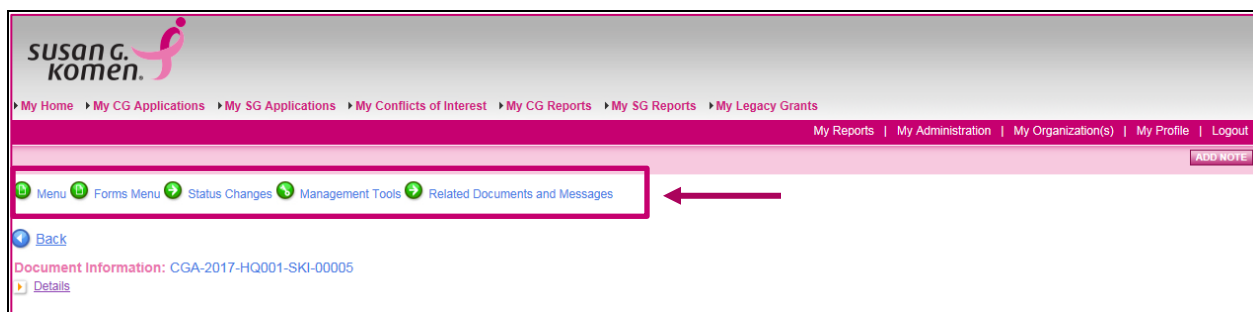
For example, to access the forms menu, you would place the cursor (arrow) over the words "Forms Menu" for several seconds
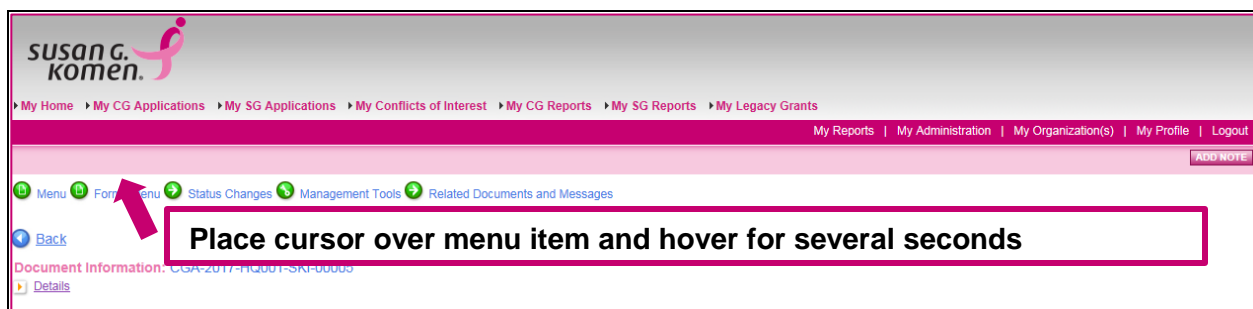
The forms menu will then appear
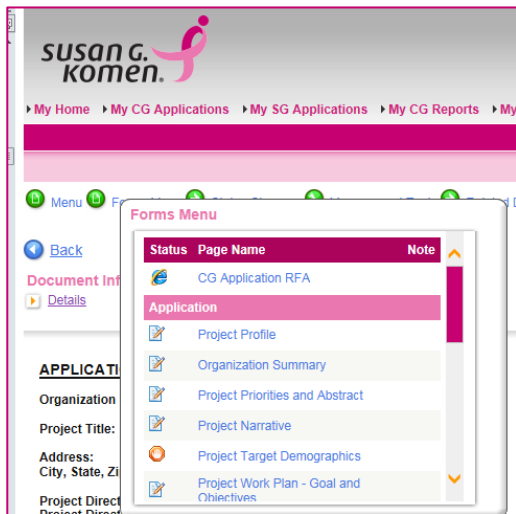
Initiating an Application

Only the Project Director is permitted to initiate an application. In order to create an application, follow these steps:

1) From the User Homepage, click the "View Opportunities" button under the "View Available Opportunities" section on the main menu. This section will show you all of the grant program types where you may apply for a new grant.
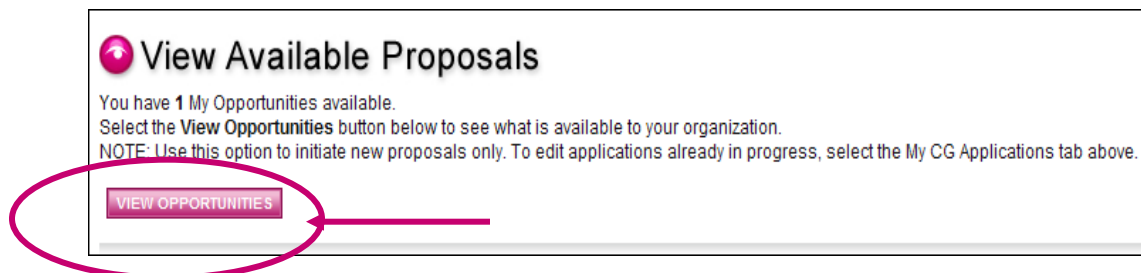

Helpful Hint:
Some Affiliates offer both Community Grants and Small Grants, and both granting opportunities may be available under "View Available Proposals." If this is the case, please ensure your organization initiates the correct grant application.

Community Grants are designated as "CG" and Small Grants as "SG."

2) For those grant programs where you are eligible to apply, you will see an "Apply Now" button under the description of the grant. Click "Apply Now" for the appropriate granting opportunity.
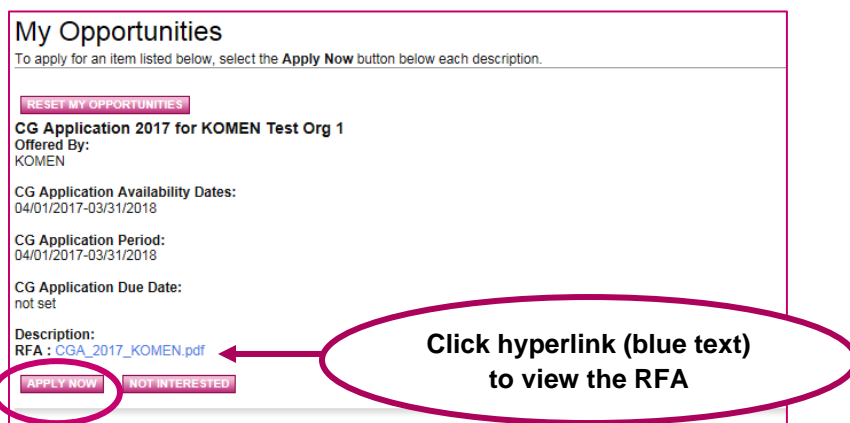
3) A confirmation page will appear.

By clicking the "I Agree" button, you will initiate a new application. An application will be created and you will be taken to the "CG Application Menu" where you can begin filling out the various sections of the application.

Accessing an Application in Progress

If the Project Director initiating the application saves work and then logs out of GeMS and then wants to return to the application, or if other users want to access the application, they must select the "My CG Applications" tab to view/edit/complete applications already in progress.

1) User selects "My CG Applications."

2) Search for the application via the various fields. We suggest using the "Status" field and selecting the appropriate status from the dropdown list, and then for "Year" entering the grant year.

3) Click the "Execute" button towards the upper right corner of the page.

4) Select the Name of the grant you would like to access for viewing/editing/completion from the "Results" section. The application name will be a hyperlink in blue and start with CGA (Example: CGA-2016-XXXXX-XXX-XXXXX).

Application Snapshot

The Application Snapshot page is the homepage for each application. It provides key information for the application and is completed as the application moves through the statuses.

The document information at the top of the page is the application's unique system name (CGA-2016-XXXXX-XXX-XXXXX). This is how the application will be referenced within the system and within emails sent regarding the application. This name cannot be changed.
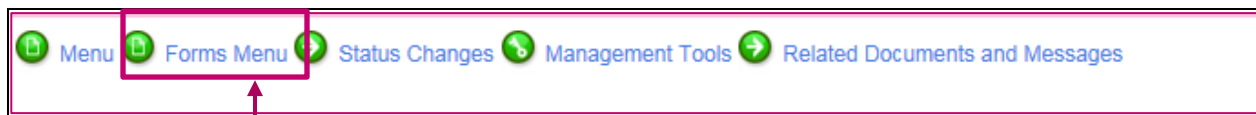
The CG Application Menu

The CG Application Menu is divided into various sections to help organize the application tasks and information. These sections are displayed and described below.
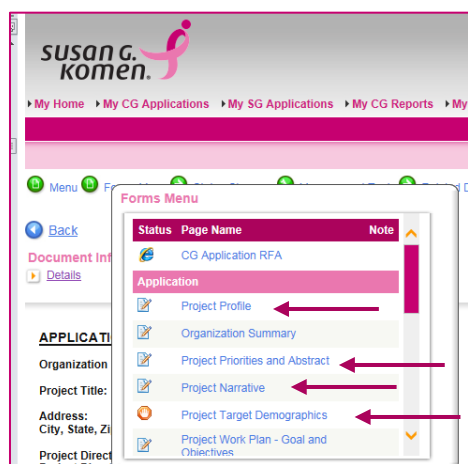
Forms Menu

The "Forms Menu" contains all of the forms associated with the application. To view the application forms:

1) Hover over "Forms Menu."

2) Click on the name of the form you wish to view/edit/complete.

If you need to see a listing of the when a page was last modified, click on the "Forms Menu" and you will see a complete listing of the pages and the dates they were initially and last saved and by which user.

Status Changes

The "Status Changes" section allows the Project Director and Authorized Signer to change the status of an application or report. Status options are dependent on the current status of the document and the role of the user. **Certain GeMS features may not be available until the application is in the appropriate status.** When it is time to change the status of the application:

1) Hover over the "Status Changes."
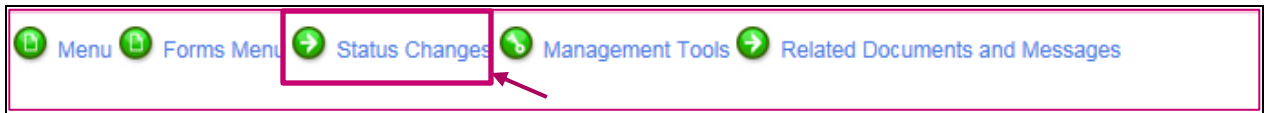
2) Click the "Apply Status" button under the appropriate status.
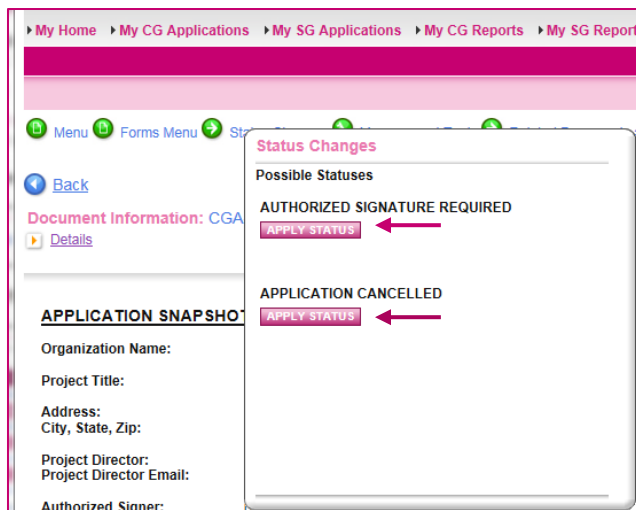
Management Tools

The "Management Tools" section allows certain administrative responsibilities, such as the ability to add/edit people to the application, print the blank or completed application, and view the status history of the application. Functionality is based on user role.

1) Hover over "Management Tools."

2) Click on the appropriate option.

Add/Edit People

As new users are approved for access to the system, they will automatically be added to applications and reports that are initiated after their approval.

They are automatically added to existing and historical applications and reports.

Related Documents and Messages (Progress & Final Reports)

If awarded, The "Related Documents and Messages" is where you would access or initiate progress and final reports.

Application Completion

If you hover over the "Forms Menu" option on the CG Application Menu, the various pages of the application are displayed. These are the forms the applicant MUST complete before the application can be submitted. On any of the application pages, you can access the list to move to a different page.

Forms Completion

When filling out an application form, it is suggested you first complete all of those fields for which you have information. Not everyone in each organization will have all of the information necessary to complete each form. Complete as much of it as you can and then click the "Save" button. Fields followed by red asterisks (*) are required fields.

> **Helpful Hint:**
>
> Refer to the Affiliate's Request for Applications (RFA) for specific information related to the various forms and required information associated with the Grant Application.

In the creation of some forms, the "Add" button is used to create additional fields so the applicant can list each item that falls under a particular category. Project Work Plan - Objectives, for example, will typically consist of more than one item. Any form that has an "Add" button allows you to have multiple instances of that particular form. The following picture shows the available "Add" button on a page where multiple pages can be created.

When multiple pages have been created for a particular form, you can choose between them. A dropdown menu will appear on the far right of the button toolbar. Select the item and hit the "GO" button and it will take you to that item's page.
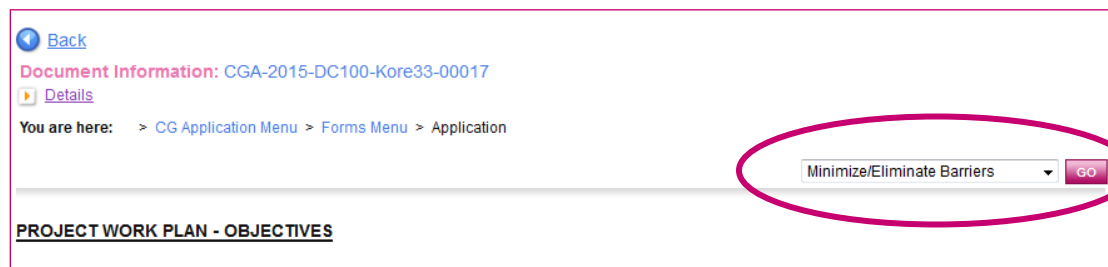
When additional pages have been created, a number in parentheses will appear after the form name to indicate the number of pages connected with the particular link. MultiPage forms will not display a Created By or Last Modified By name/date.

Automatic Calculations

When possible, **GeMS will automatically calculate totals for you.**

Click the "Save" button to perform calculations – calculations will not occur until the "Save" button is selected. Please refer to the example below for details.

The "Project Budget Summary" page is another example of automatic calculations. When the Project Budget Summary is opened, the system will take the values you have entered in the Budget pages and display the information in the Project Budget Summary.

Error Messages

If any required field is not completed within an application form or there are business rules violated, an error message will be displayed in red across the top of the page immediately after the "Save" button is clicked. During form completion it is not necessary to correct errors right away. You may return to the form at a later time and fix errors. If for some reason any errors remain when you attempt to submit the application, you will receive an error message. The GeMS system will require the errors be fixed before the application submission can be completed. See the example below:


Uploads & Attachments

For some pages, form fields are not enough to capture the type of information that may be required. In those situations, a file upload field may be provided to allow you to upload a file instead. Files of the following types are allowed as uploads: bmp, doc, docx, gif, jpg, pdf, png, ppt, tif, txt, wpd, xls and xlsx. To upload a file, click the "Browse" button. Uploads should be 15 megabytes or less.

Browse to the folder that contains the file you would like to upload and either double-click the file or click the file and then click the "Open" button.
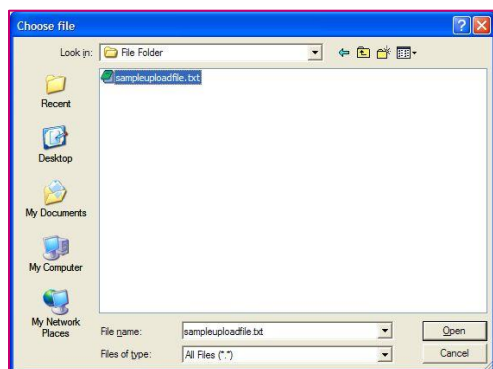
After the page reloads, you must then click the page "Save" button to save the uploaded file.

PDF Version

In many pages, once the page is saved, a "Print Version" button will be available that will automatically create a PDF for you with the data you provided for each form. These dynamic PDFs can be printed or saved to your computer for reference.
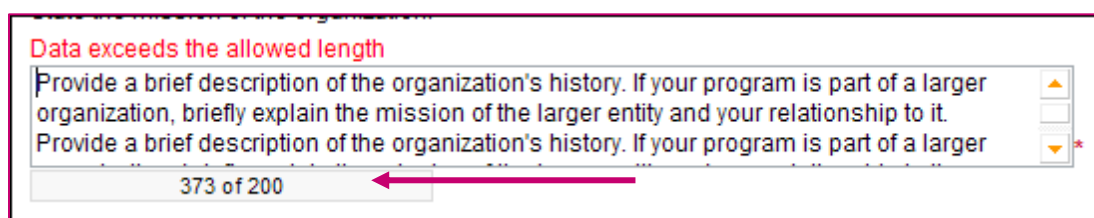
Copy and Paste

Applicants should be cautious when utilizing copy and paste. We suggest you copy to NotePad first, then to GeMS. Copying to NotePad will remove all formatting. If you copy in Microsoft Word and then paste into GeMS, the character count for the text box will not appear. Backspace at the end of what has been pasted in the text box to get the correct character count to appear.

Text Limits

Applicants must also be aware of the character limits of each text box, as attempting to copy and paste text larger than the allotted amount of space will yield an error. The character limit may be found at the bottom left of each text box.


Note: If character count has exceeded the allowed length, **do not exit the document until you have edited your entry** to the allowed character limit; otherwise all entered data will be lost.
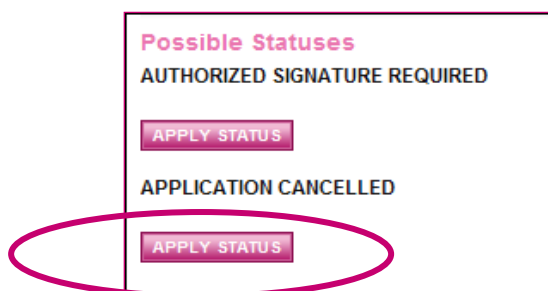
Application Cancellation

At any point in the application process a Project Director or Authorized Signer can cancel an application. We recommend you do this if you initiate more than one application in error.

1) Project Director or Authorized Signer navigates to the appropriate application in "Application in Progress Status."

2) Hover over "Status Changes" to see the possible statuses.
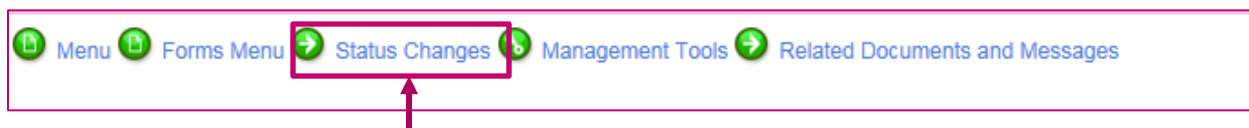
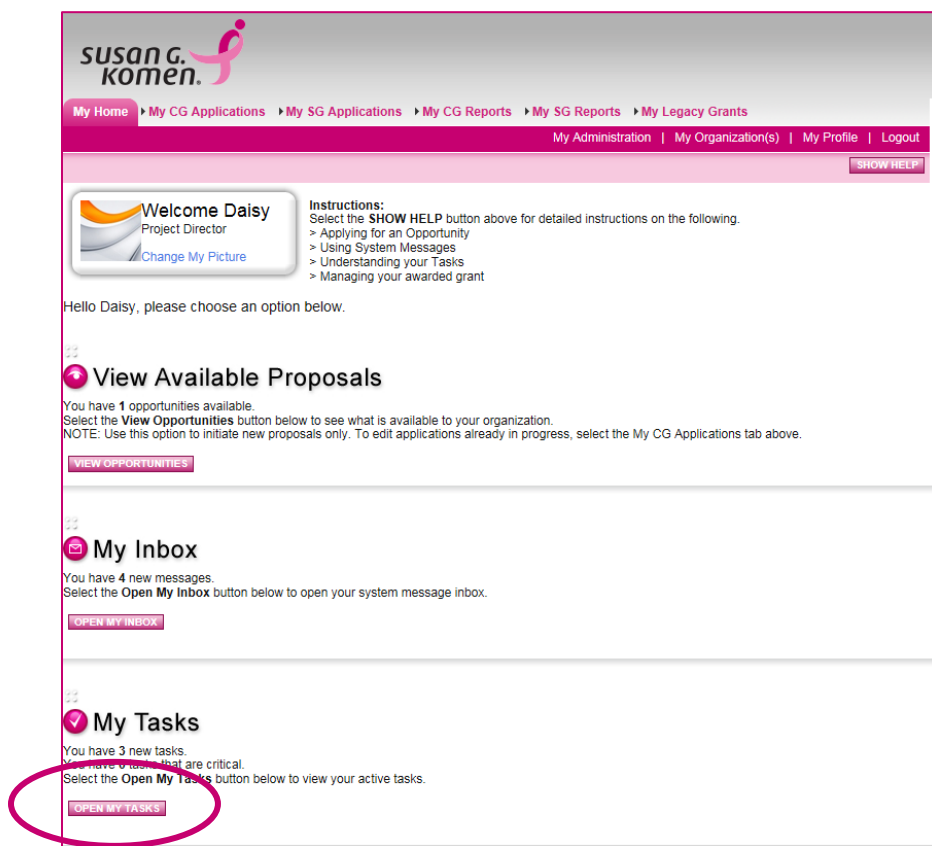3) Click "Apply Status" under "Application Cancelled."

Application Submission

The Project Director must change the status of the application to "Authorized Signature Required" to begin the application submission process. Only the Project Director can complete this status change.

After the Project Director has changed the Application status, the **Authorized Signer** must finalize the submission by changing the status to "Application Submitted."

Only the Authorized Signer can complete this status change.

> **Once an application is submitted it will enter into a read-only status and cannot be changed!**

1) **Project Director** logs in and clicks "Open My Tasks" under "My Tasks."

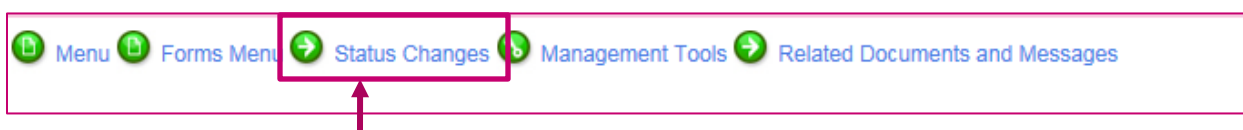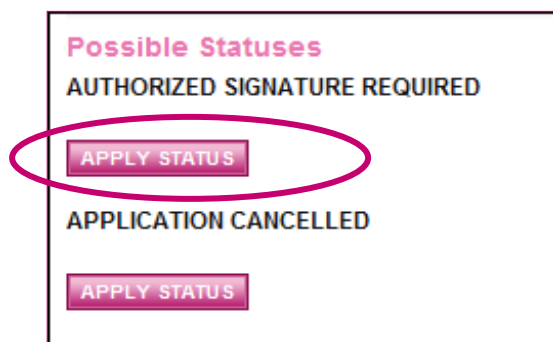2) Select the grant you would like to submit in your task list.

3) Hover over "Status Changes" to see the possible statuses.

4) Click "Apply Status" under the appropriate status.

If any errors exist on any of the application's forms when the Project Director attempts to change the status to "Authorized Signature Required" or the Authorized Signer attempts to submit, they will receive an error message directing them to the form(s) with errors. All errors must be fixed before GeMS will allow an application to be submitted. If no errors exist, the grantee will be prompted to confirm his or her submission. You can check for errors at any time using the Global Errors link.

5) **Authorized Signer** logs in to GeMS and clicks "Open My Tasks" under "My Tasks."

6) Select the grant you would like to submit in your task list.

7) Hover over "Status Changes" to see the possible statuses.
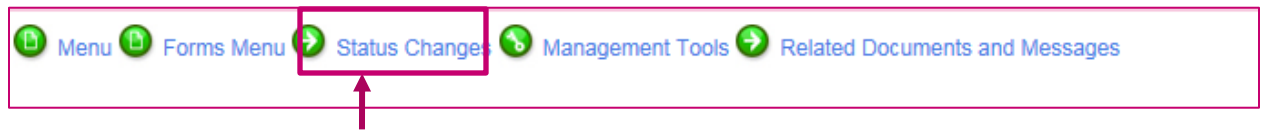
8) Click "Apply Status" for "Application Submitted."
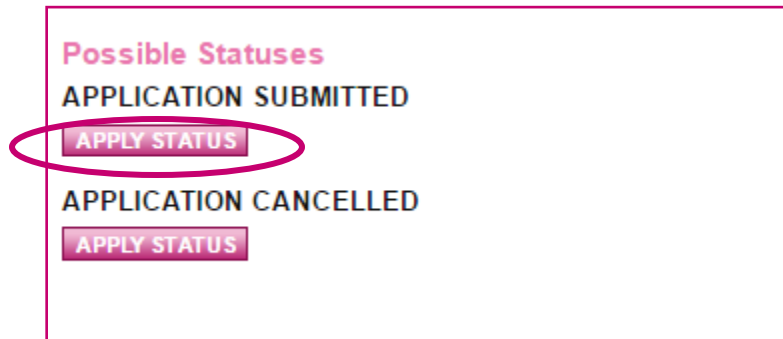
Application Revision

If your organization is required to make revisions to your application before the application can progress to the peer review panel for funding consideration, the **Project Director** must follow these steps:

1) From the "User Homepage" and click "Open My Tasks" under "My Tasks."
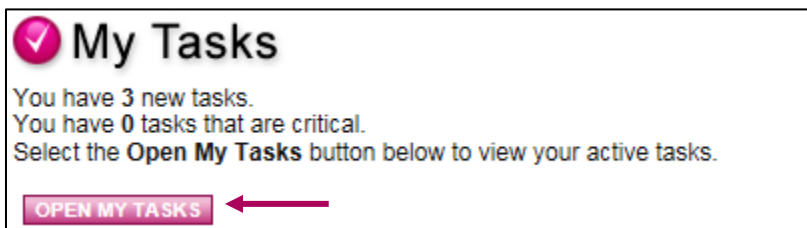
2) Select the application name for the project in which revisions are required.

3) Hover over "Forms Menu" and update each form that the Affiliate has requested revisions to.

4) Once all revisions are completed, hover over "Status Changes" and select the "Apply Status" button under the appropriate status.

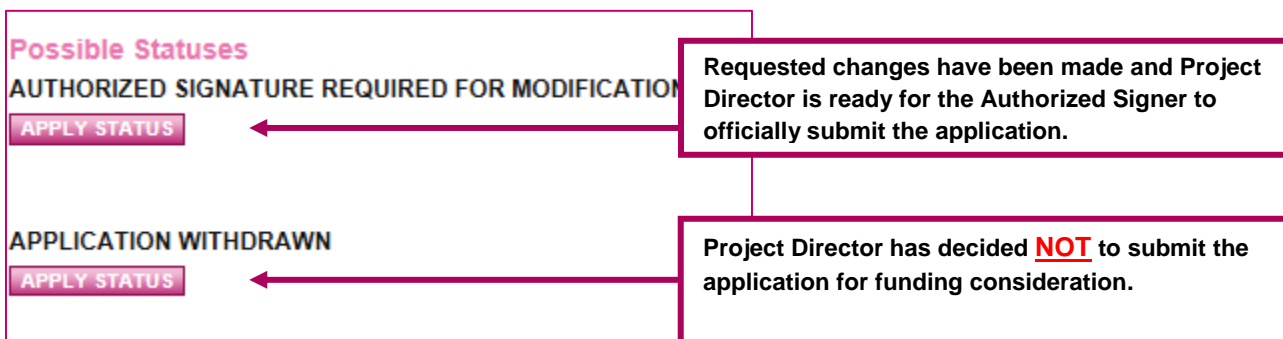5) The **Authorized Signer** logs in to GeMS and clicks the "Open My Tasks" button under "My Tasks."
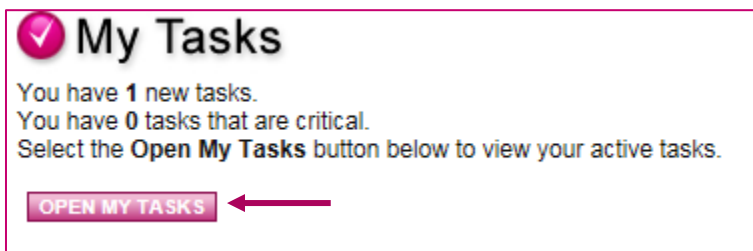
6) Select the name of the application you would like to submit from the My Task list.
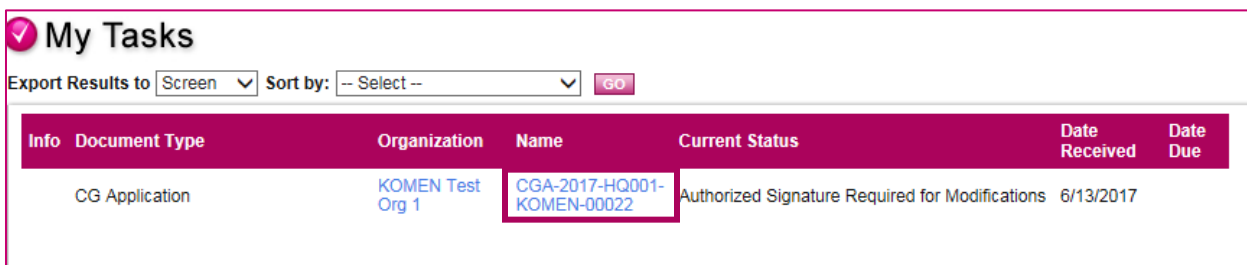
7) Confirm changes have been made to the appropriate sections of the application by hovering over the "Forms Menu" and selecting the appropriate pages.

8) Hover over "Status Changes" and select the "Apply Status" button under the appropriate status.

Authorized Signer has reviewed the revised application and is ready to officially submit to the Affiliate for funding consideration.

Authorized Signer has reviewed the revised application and determined **NOT** to submit the application for funding consideration.
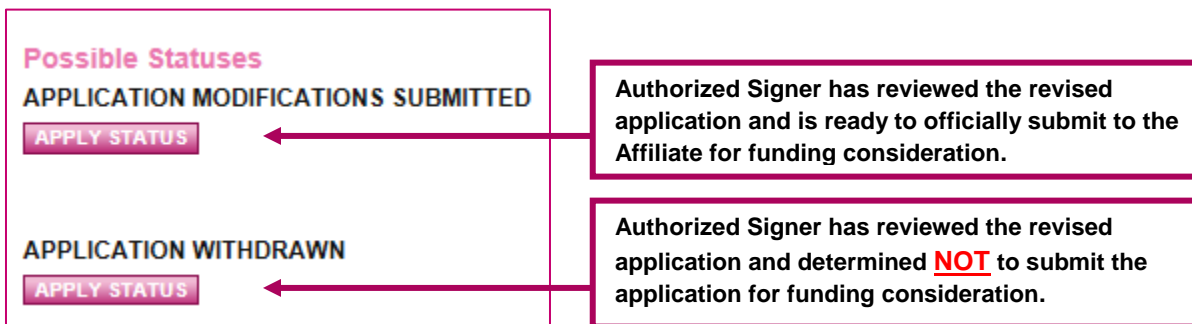
Helpful Hints

- When completing the application within GeMS, please review the Request for Applications and additional support tools provided by the local Affiliate for details on each application page and submission requirements.

- **Before you start typing on any page in GeMS, make sure a "Save" button is located in the upper right-hand corner**. If you do not see a "Save" button, then any additions or edits made will be lost. The presence of the "Save" button on an application page is dependent upon the status of the application and/or the role of the user. For example, if the status of the application is "Application Submitted," no changes to the application can be made. Therefore, the "Save" button will not appear.

- If the "Save" button is present, save often for good measure. **If you do not hit "Save" and you navigate away from the screen, your data will be lost.**

- If you scroll over the first aid kits, help content will be available for that specific question.

- **The system will log out after 45 minutes with no activity. If the system logs out automatically, the last data entered will not be saved if the save button was not selected prior to the log out.**

- If you copy and paste text from Word, you must hit the backspace button within the text field for the character count to be shown.

- The Project Work Plan Summary is a report of the goal and all objectives entered on the Project Work Plan pages.

- Print versions of the blank application and completed application are available within the Management Tools section of the application menu.