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

![Internet Options]

Select a zone to view or change security settings.

- Internet
- Local intranet
- Trusted sites
- Restricted sites

Local intranet
This zone is for all websites that are found on your intranet.

4. Click Local intranet

![Internet Options]

Select a zone to view or change security settings.

- Internet
- Local intranet
- Trusted sites
- Restricted sites

Local intranet
This zone is for all websites that are found on your intranet.

5. Click Sites

![Internet Options]

Select a zone to view or change security settings.

- Internet
- Local intranet
- Trusted sites
- Restricted sites

Local intranet
This zone is for all websites that are found on your intranet.
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.

Grant Related Links:

This page will contain related links. You can add links to your favorite granting agencies here.
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:
You are now ready to upload your application and other documentation into your document set. Begin by selecting the **Documents** tab.
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’.
Click on ‘Submit for Executive Approval’ link to the right of this page:
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’.
Select ‘Submit for Peer Review’ link to the left of this page:
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.

Task assigned by Wilbers, Barb on 9/20/2012.

Due by 1/1/0001

Peer Review started by Wilbers, Barb on 9/20/2012 11:56 AM

Comment:

To complete this task:
1. Review National Geological and Geophysical Data Preservation Program.
2. Perform the specific activities required for this task.
3. Use the Open this task button to mark the task as completed. (If you cannot update this task, you might not have access to it.)
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.

Peer Review has completed on Test.

Peer Review on Test has successfully completed. All participants have completed their tasks.

Peer Review started by Wilbers, Barb on 9/20/2012 3:20 PM
Comment:

Completed by Hines, Laurie on 9/20/2012 3:22 PM
Comment: feedback on test document. Everything looks good, no comments from this peer reviewer.

View the workflow history.
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.
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.
Click on drop down arrow next to ‘Alert Me’ and select ‘Set alert on this library’.
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.

Alert 'Grant Opportunities' has successfully been added on 'GROW-MO'.

You will receive alerts according to the delivery method, timing and criteria that were selected when the alert was created.

You can change this alert or any of your other alerts on the My Alerts on this Site page.

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.