# eGMS Grantee User Guide

Version 1.2.0
Updated March 15, 2012

National Endowment for the Humanities

# Contents

# Introduction

eGMS has been designed to make it easier to submit and manage reports, respond to award offers, report on grant outcomes, and communicate with the National Endowment for the Humanities (NEH).  This user guide will introduce you to the different areas of eGMS and provide instructions for using these areas easily and effectively.

NEH accepts all financial and performance reports via eGMS.  Reports will be accepted for existing grants as well as new grants.  Official correspondence will use the eGMS messaging area.

At this time, payment requests are not accepted by eGMS.

# Getting Started

## *System Requirements*

To use eGMS, you must have a computer with an internet connection, a web browser to view web pages on the internet, Adobe Acrobat Reader software to view submitted reports, and a way to convert your performance reports to PDF format.  The Adobe Acrobat Reader software is available for free online at http://get.adobe.com/reader/otherversions/.  If you do not have a way to save your documents in PDF format, please consult our guide to free or low-cost converters at http://www.neh.gov/grants/grantsgov/pdf.html.

## *Access to eGMS*

To begin, open a web browser such as Microsoft's Internet Explorer or Mozilla Firefox and go to the following URL:

**https://securegrants.neh.gov/eGMS/**

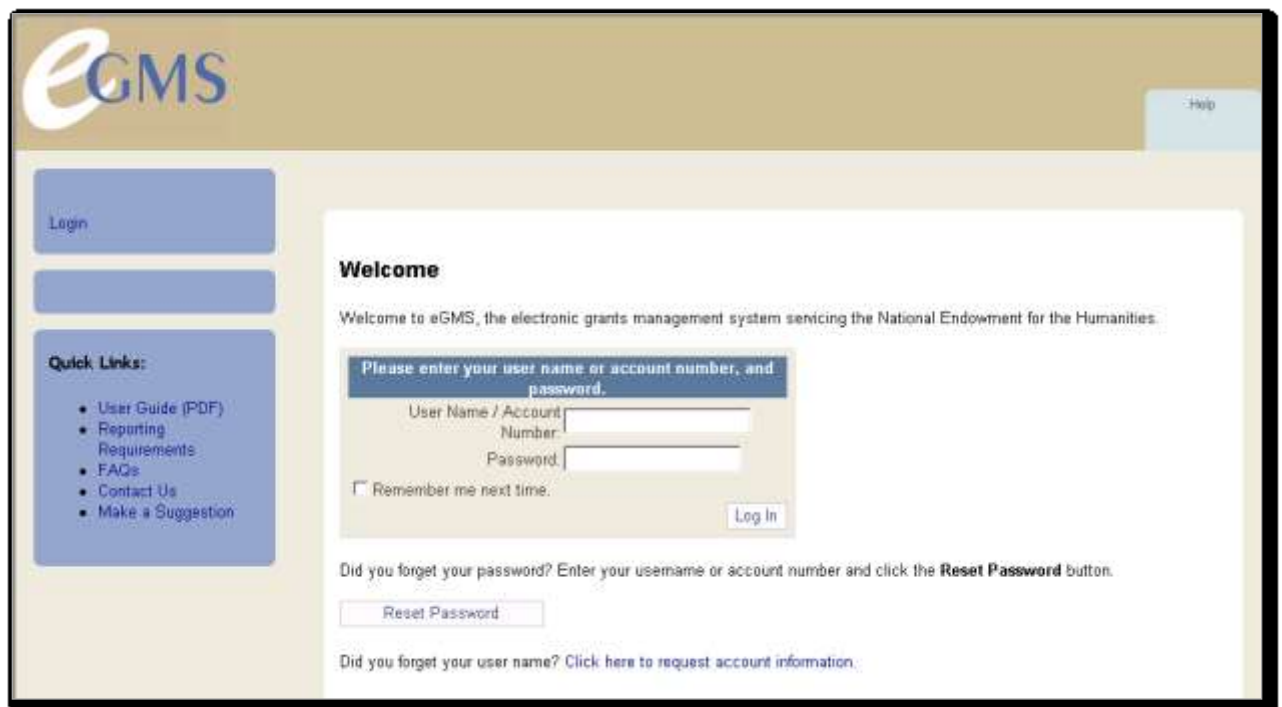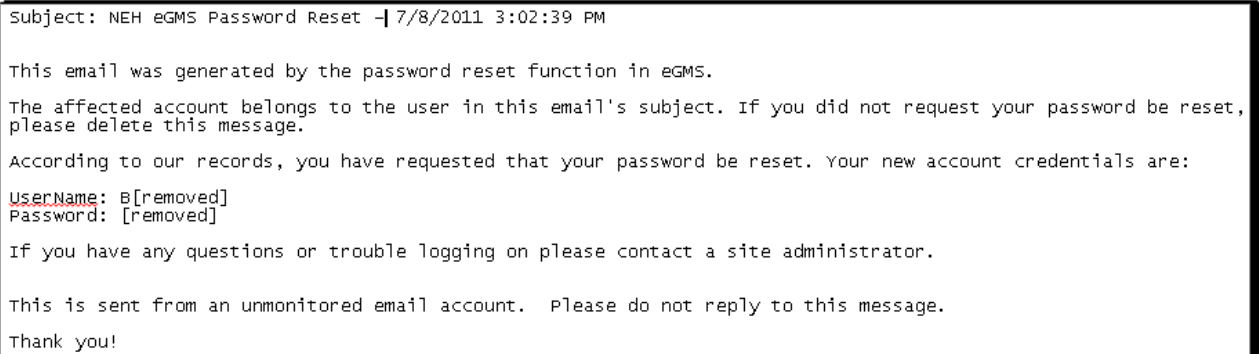You will now see the Login area.



**Figure 1: eGMS Login**

To login, you must first know your account number or user name. This information is provided in the Notice of Action you received with your grant award documents or within

your Offer letter[1].  If you do not know your account number or user name, click the **Click here to request account information** hyperlink at the bottom of the login page.  You will be prompted to enter your email address.  If the email address matches an eGMS account, information regarding the account will be sent to that email address.

**Note:** User names were introduced to eGMS in July 2011.  If you do not have a user name but you do have an account number, you will be prompted to select a user name when you log in.

## *Selecting a Password*

If you are accessing eGMS for the first time, enter the account number or user name you were provided and click the **Reset Password** button.  An e-mail message will be sent to you with a temporary password.

```
Subject: NEH eGMS Password Reset -|7/8/2011 3:02:39 PM

This email was generated by the password reset function in eGMS.

The affected account belongs to the user in this email's subject. If you did not request your password be reset,
please delete this message.

According to our records, you have requested that your password be reset. Your new account credentials are:

UserName: B[removed]
Password: [removed]

If you have any questions or trouble logging on please contact a site administrator.


This is sent from an unmonitored email account.  Please do not reply to this message.

Thank you!
```

**Figure 2: Reset Password E-mail Message**

Return to the eGMS login page and enter the provided user name and password. You will next be prompted to reset your password.  If you have never accessed eGMS before, you will also create a security question to help retrieve your password in the future.  Please note that passwords must contain between 8 and 16 non-whitespace characters, 1 number, 1 uppercase character, 1 lowercase character, and 1 symbol.

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[1] Offer letters include account information beginning in March 2012.

**Figure 3: Password Reset**

## *Main Menu*

After you log in to eGMS, you will see the main menu, which lists the grants to which you have access.
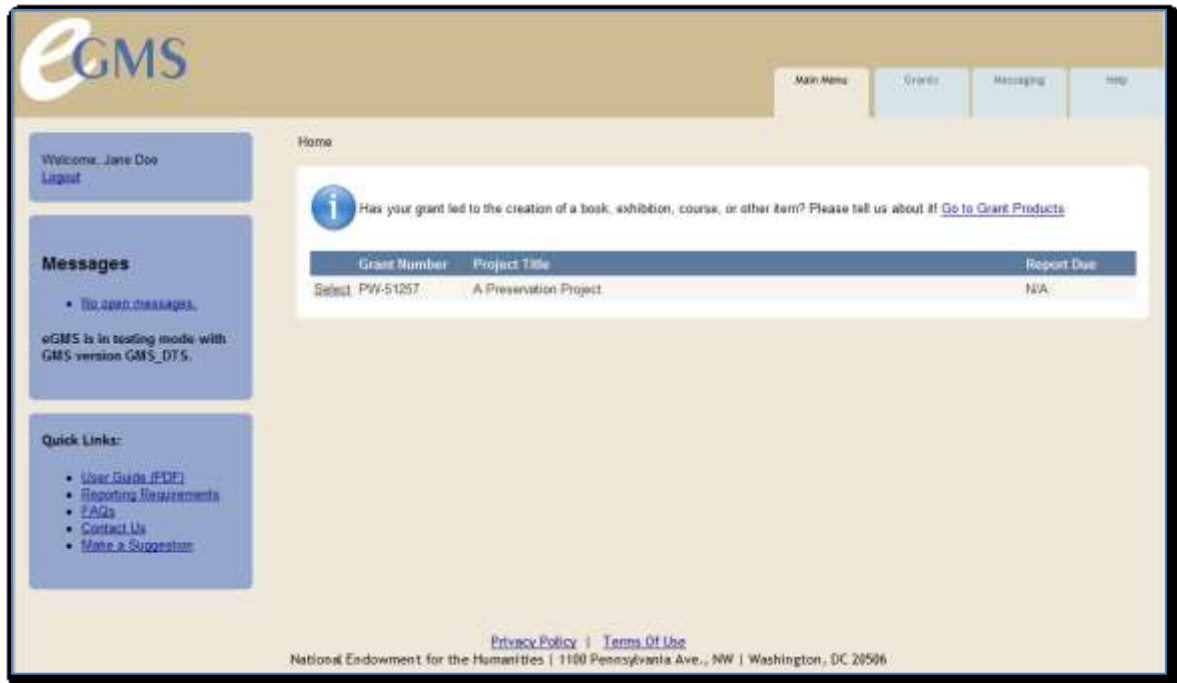


**Figure 4: eGMS Main Menu**

The left-hand side of the eGMS web site contains important links, system notices, messages to you, and a list of reports that may be due soon or delinquent.  At the upper right-hand corner of the web site, navigational tabs take you to the four main sections: **Main Menu**, **Grants**, **Messaging**, and **Help**.

After selecting a grant, you will be able to perform up to three functions. First, you may view, accept, negotiate, or decline an offer sent to you by NEH. Second, you may view and submit post-award reports for your grant.  Finally, you may tell us about the results of your grant in the Products and Coverage area.

# Accepting or Rejecting an Offer

NEH may send to you an offer letter after your grant has been approved for funding. After logging into eGMS, you will see an offer alert at the top of the page. You can access the offer by clicking on the alert link.



**Figure 5: Offer Alert**

You will be directed to the offer page where you can view the offer letter along with other related documents, upload documents requested by NEH, and accept or decline the offer.

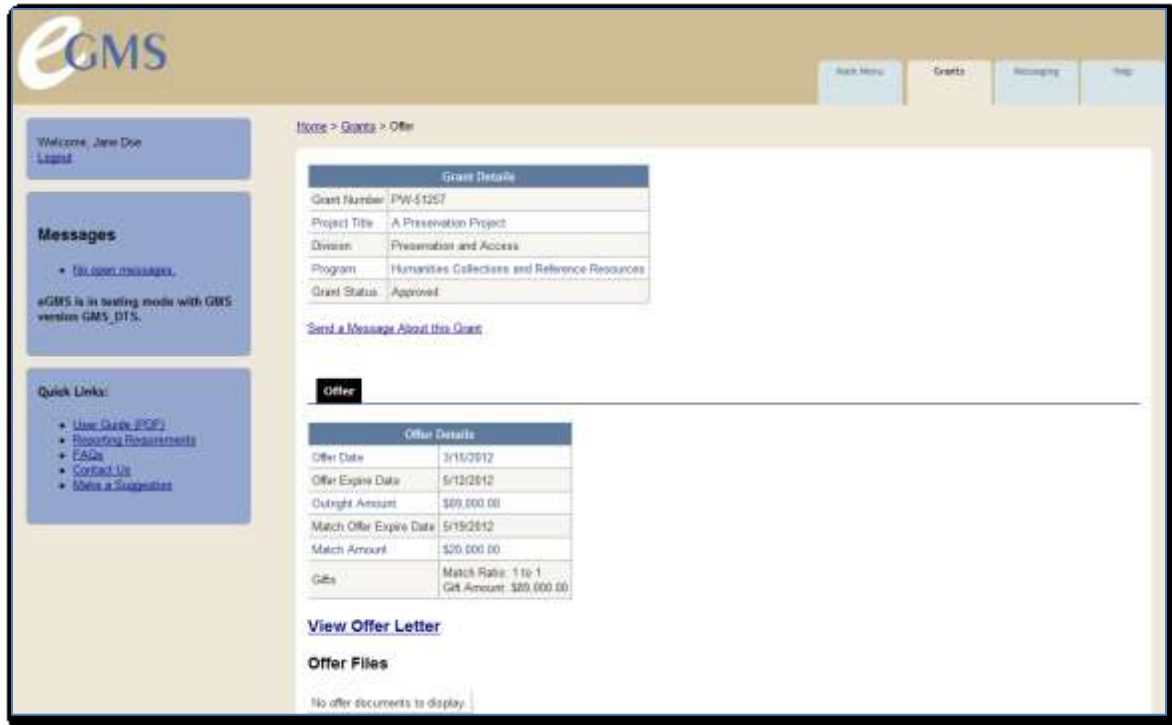Any messages you receive during the offer process are also available in the Messaging area.

**Figure 6: Viewing an Offer**

> **Important Note**
> If your grant is awarded to an organization, only the institutional grant administrator can accept or reject an offer. The **Accept** and **Reject** buttons will be disabled if you do not have the necessary permissions.

## *Accepting an Offer*

NEH staff may require that you provide certain documents before completing the offer acceptance process. You may upload these documents before or after accepting the offer.

### Uploading Offer Documents

To upload a file, click the **Select File** button and select the document from your computer. Click **Continue** to complete the uploading process (see Figure 8). The Offer page will refresh and you will see the uploaded document in the list of Offer Files. When you upload a document, eGMS will notify NEH staff of your uploaded document so it may be reviewed.
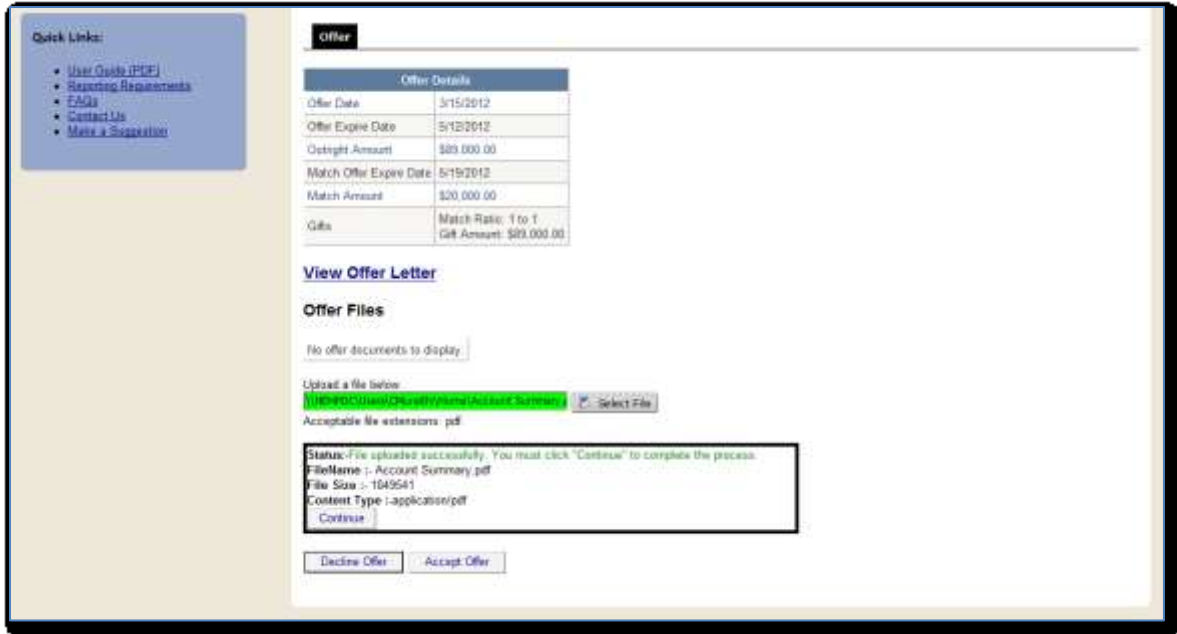
**Figure 7: Uploading Offer Documents**

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**Important Note**

You can only upload PDF files. Convert your files to PDF prior to uploading them.

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## Accepting the Offer

To accept the offer, click the Accept button. You will be asked to confirm that you want to accept the offer. Click **OK**.

## *Declining an Offer*

To decline an offer, click the **Decline** button. Enter your reason and click **Save** (see Figure 7). Note that the grant will no longer be listed on your list of grants after you log out.

**Figure 8: Declining an Offer**

# Submitting a Grant Report

To submit a report, first select the appropriate grant number by clicking it from the main menu. You will now see a list of the reports on schedule for your grant. Every report is assigned an identification number for reference purposes called a Report ID. You will also see the type of report and its due date. If you have never submitted a particular report, click the **Submit** link. If you have submitted a report in the past you may view it by clicking **View** or submit a revision by clicking **Resubmit**.



**Figure 9: Reports by Grant**

> **Important Note**
> If you do not see a submit button to the left of a report, you do not have permission to submit that kind of report. In general, for grants made to institutions, only the grant administrator may submit financial reports. If you have questions regarding your eGMS permissions, please click the **Contact Us** link to send your request to the right person.

## *Financial Reports*

## Web Form Submissions

The Federal Matching, Final Financial, Challenge Financial, and Gift Certification reports may be completed online using forms that handle calculations for you. Follow the form instructions and consult the provided additional guidelines while completing these forms.

Some forms provide the option to attach additional documentation, as seen below in the Federal Matching Funds report. Additional documentation may be uploaded by clicking the **Browse** button, selecting the file from your computer's file system, and then checking the "Documentation Attached" checkbox. Please note that files must be in PDF format to be accepted.



**Figure 10: Federal Matching Funds Report**

Upon submitting the form, be sure to read the certification language before clicking the **Submit Form** button. Clicking the **Submit Form** button sends your report to NEH with your electronic signature. The form is converted to PDF format so that it may be viewed from the Grant Reports main menu. You may also save a copy of the report.

> Financial reports are always retained by NEH, so resubmitting will not replace an existing report. Instead, when you view the reports for a particular grant, you will see multiple financial reports listed.

## Alternative Submission Option

If you have already completed a financial report by different means, such as using a fillable PDF form, you may submit this version using the upload tool at the top of the financial report web form.
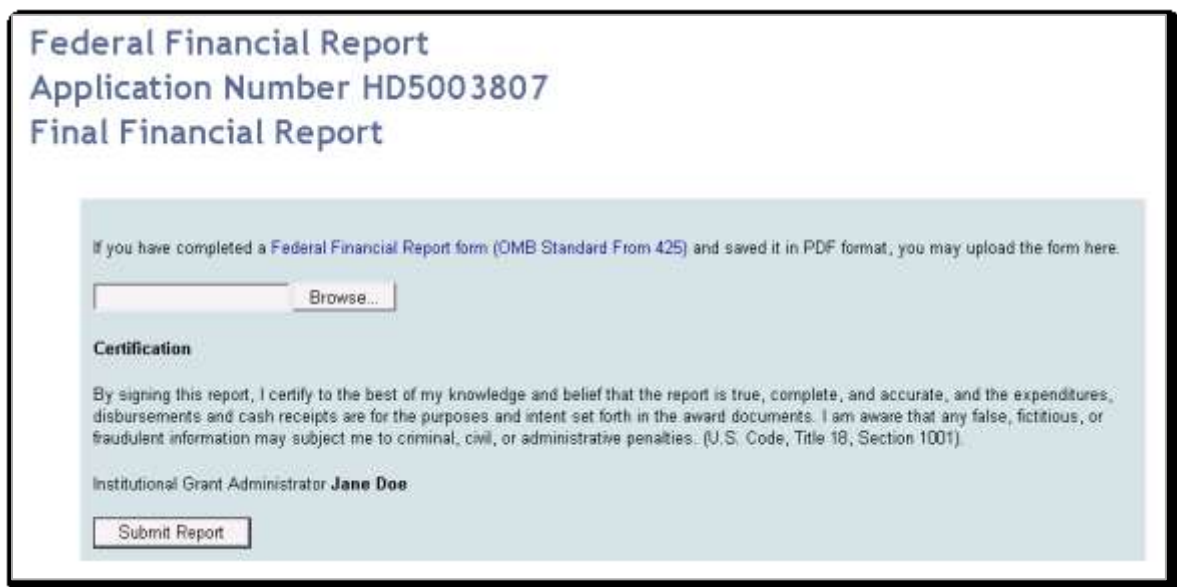


**Figure 11: Alternative Financial Report Submission**

Click the **Upload a Report** button.



**Figure 12: Uploading a Financial Report**

Next, click the **Browse** button, locate the file in your file system, and click the **Submit Report** button.  Please note that your file must be in PDF format.

## *Performance Reports*

Performance reports are submitted by simply uploading PDF-formatted files using the form illustrated below.



Home > Grant Reports > Performance Report

# Final Performance Report

Upload your report below. The report must be in PDF format.

[                    ] [ Browse... ]

[ Upload Report ]

**Figure 13: Performance Reports**

Some kinds of performance reports require following particular instructions that will be displayed on the Performance Report web page.

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**Important Note**
Resubmitting a performance report will replace the existing performance report on file at NEH.

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# Submitting Grant Products and Coverage

## *Grant Products*

Has your NEH grant resulted in the creation of some kind of product?  Products may include a journal article, book, conference presentation, exhibition, film, or even a faculty position.  You may use eGMS to tell NEH about the results of your grant even years after your grant has ended, and the information will be available on the NEH web site when members of the public search for information about NEH grants.[2]

To provide product information, click on the desired grant on the main menu and click the **Products and Coverage** tab.
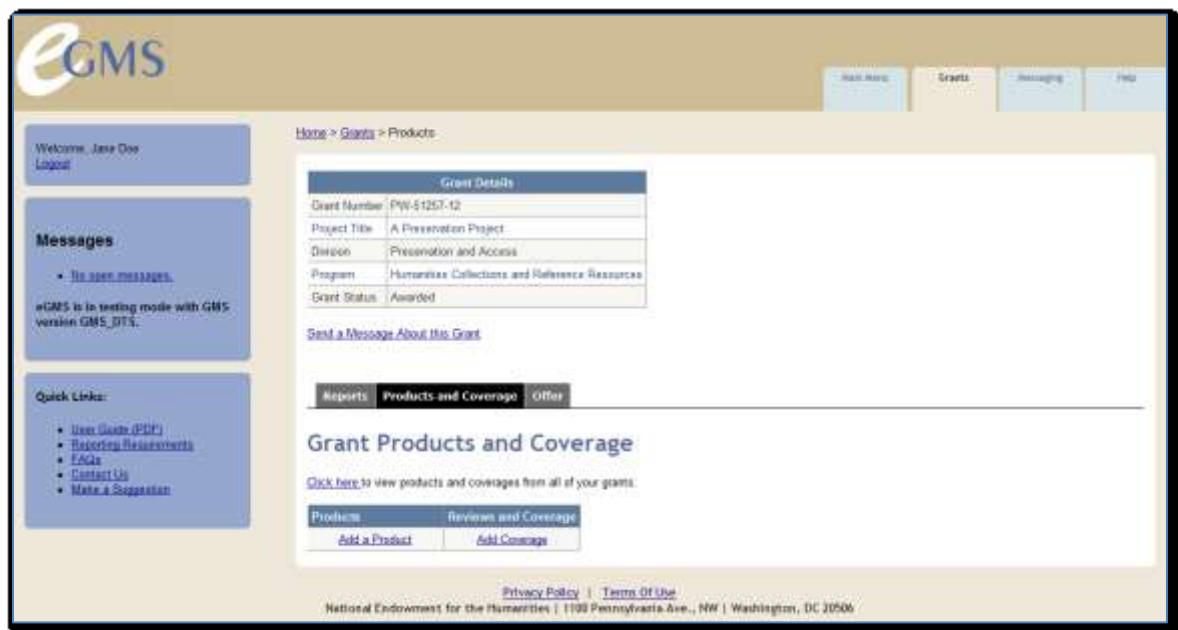


**Figure 14: Grant Products and Coverage Main Menu**

You will see links to add product and coverage information for your grant.  If you have supplied information in the past, you will also be able to modify the existing information. You may view product and coverage information for all of the grants to which you have access by clicking the link directly below the Grant Products and Coverage heading.

## Add a Product

To add a new product, click the **Add a Product** link.  Next, select the type of product.

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[2] Grant product data submitted via eGMS are subject to review by NEH staff members prior to release on the NEH web site.  This review period will extend for 60 days after submission or revision.

Home > Products & Coverage > Add/Edit Product

# Add a Grant Product

**Product type**   -- Select a product type from the list --   ▼

-- Select a product type from the list --
Acquisitions/Materials Collection
Article
Blog Post
Book
Book Section
Buildings
Catalog
Center
Computer Program
Conference Paper/Presentation
Conference/Institute/Seminar
Course or Curricular Materials
Database/Archive/Digital Edition
Exhibition
Film/TV/Video Broadcast or Recording
Game/Simulation
Grant
Public Lecture or Presentation
Radio/Audio Broadcast or Recording
Report
Script
Staff/Faculty/Fellow Position
Web Resources

Add Grant P...

Looking for help?
Hover over the field names for a description of the field and tips.

**OMB No. 3136-0134**
**Expires: 6/30/2012**

NEH estimates that ... per response. This estimate includes the time for reviewing the instructions for ... g the data on the form. Please send any comments regarding this estimated comp ... suggestions for reducing completion time, to the Director, Office of Publication ... ton, D.C. 20506; and to the Office of Management and Budget, Paperwork Reducti ... cording to the Paperwork Reduction Act of 1995, no persons are required to resp ... a valid OMB control number.

**Figure 15: Add a Product**

After selecting the type of product, complete the supplied form.  Additional help for the form is available by hovering over a field name.

**Figure 16: Adding a Grant Product**

Some form fields support multiple entries. For example, the form in figure 12 supports entry of multiple authors. Enter an author's name and then click the **[Add another Author]** link. Your existing item will appear below the entry area and you will be able to add an additional name.

Once you have completed the form, click the **Add Grant Product** button.

## Adding a Prize to a New Product

If a product has received a prize, after adding the product, click the **[Add a Prize]** link. (If the product has not received a prize, click **Save Changes** to return to the main menu.)

**Figure 17: Adding a Prize**

Complete the provided form to provide information about the prize, and then click the **Add Prize** button.



**Figure 18: Entering prize information**

After clicking the **Add Prize** button, click the **Save Changes** button to return to the main menu. You will also be able to add additional prizes by clicking the **Add Prize** button again or editing the product.

## Edit a Product

Once a product has been entered, it may be edited by clicking the **[Edit]** link.

> **Important Note:**
> You will be able to edit products for grants that may have been entered by other people who also have access to the grants using eGMS. For example, a project with multiple project directors will allow both individuals to view and edit the same set of products.

Award-winning products will be displayed with a trophy.



**Figure 19: Editing a Product**

Once the **[Edit]** button has been clicked, you may revise the product information and add, edit, or delete prizes.

## *Coverage*

Has your grant been reviewed or received media coverage? If so, please tell us about it. You may use eGMS to tell NEH about coverage of your grant even years after your grant has ended, and the information will be available on the NEH web site when members of the public search for information about NEH grants.[3]

To provide coverage information, select a grant from the main menu and then select the Products and Coverage tab (see Figure 14).

### Add Coverage

To add coverage, click the **Add Coverage** link next to the grant in the Grant Products and Coverage main menu. Complete the provided form and click the **Add Coverage** button when finished.

### Edit Coverage

To revise information about coverage of your grant, click the **[Edit]** link next to the item in the Grant Products and Coverage main menu.

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[3] Grant coverage data submitted via eGMS are subject to review by NEH staff members prior to release on the NEH web site. This review period will extend for 60 days after submission or revision.

# Communicating with NEH using eGMS

Sending messages to NEH regarding your grants and reports has never been easier—or so easy to manage.  To send a message to NEH, click the **Send a Message About this Grant** link on the grant main menu and complete the provided form.  When a NEH staff member replies to your message, you will receive a notification by e-mail that a new message has been sent to you.

eGMS provides a **Messaging** area with options to view messages regarding a particular grant.



**Figure 20: eGMS Messaging**

Messages may also be generated by using the **Help** section of eGMS.

# Using Help

The Help section of eGMS provides the latest grant reporting requirements, answers to frequently asked questions, and our privacy policy.  A form is provided for contacting NEH grant management or technical staff.  In addition, a tool is provided for changing your account password.