This guide provides an overview and some tips for using Grants.gov Workspace. It is not intended to be a step-by-step walkthrough that covers all aspects of submitting an application.

Though switching from Coeus to agency systems marks a new business process for JHU, Workspace is not a new system. Once you’ve logged it to check Workspace out yourself, you’ll be surprised by how familiar the forms are and how intuitive the system is.

In this guide, “Workspace” refers to the system and “workspace” refers to your workspace application. If you have questions and want to learn more, we’ve added a list of resources and a FAQ to the end of this document.
OVERVIEW

GENERAL

• Only use for Workspace for submissions to agencies that do not have a dedicated submission portal (e.g., CDC, HRSA, DOD, etc.)
• Files cannot exceed 200MB.
• Do not use the Adobe attachment function (the paper clip in the taskbar) to upload files. You must use the in-form “Add Attachment” option. Not using the in-form options will cause errors.
• Disable pop-up blockers for the Grants.gov site. Some confirmation boxes appear in pop-up windows.
• Available and required forms vary by FOA and agency. Always read the application instructions carefully.
• Like the Adobe Legacy forms, completing the SF424 R&R form will populate some fields in the rest of the package.

ACCESS AND OWNERSHIP

• You can only create a workspace if you have a Grants.gov account with the “Manage Workspace” role.
• The person who creates the workspace is workspace owner and can grant other users access to the workspace.
• If the FOA is not compatible with Workspace, it will not be listed as an option on the FOA.
• You do NOT need an account to search for and download funding opportunities.

CREATING A WORKSPACE

• You must be logged in to Grants.gov to create a workspace.
• You can complete forms online (web forms) or download forms to complete offline and upload later.
• You can run a check on each page for errors.
• Each question/section links to help documents for that question.

SUBMISSION/POST-SUBMISSION & TRACKING

• No significant changes.
You must have a Grants.gov account to create and be added as a participant on workspaces. Get set up here: https://www.grants.gov/web/grants/applicants/registration.html.

- You need an **ORGANIZATION APPLICANT** account.
- Our DUNS is 00-191-0777.

- Once you have created your account, at this time, only ORIS can grant you the “Manage Workspace” role.

**REMEMBER!**

- You can only create a Workspace if you have the **Manage Workspace** role.
- Whoever creates the Workspace becomes the workspace owner and can grant permissions to other users and transfer ownership of a workspace to another user.
You must be logged in to Grants.gov to create a workspace. After you log in, you’ll start at the Welcome screen/Applicant Center.

Select “Create Workspace” to create a new workspace OR “Manage Workspace” to access an existing workspace.

- You can also access Workspace directly from a link in any compatible FOA.
• Enter the FOA number or the package ID*. 

*All FOA have package ID's that are available when you search Grants.gov for opportunities. These ID’s do not appear in the FOA.

• Enter an Application Filing Name. 
  o The **Application Filing Name** is a required field, limited to 240 characters. This does not need to be the grant title, but it cannot be left blank. **ORA Suggestion: Keep it brief and descriptive, “Smith 0618 DiabetesR01-mice” so that it is easier to locate later.**

• Click the **Create Workspace Button** to launch the Manage Workspace Page.
MANAGING WORKSPACES (note the plural – this relates to all of your created workspaces, not a specific one)

Search by any of the criteria below to find workspaces where you are the workspace owner or a participant. In the example below, I searched by “last activity date”. Select the form you want to access from the Actions column (last on the right).

- **Copy**: Use to copy the workspace to use for another application.
- **Manage**: Use to open an “In Progress” workspace.
COMPLETING A WORKSPACE

The Manage Workspace page is the hub of all actions and activity for the workspace. You will download and select forms to complete, grant workspace access to the other users (participants), preview and validate the application from this screen.
The top section of the Manage Workspace screen has a helpful bar that tracks your progress.

- **Green check**: Indicates what you’ve completed so far.
- **Red ellipses**: Indicates your current progress—where you are in the completion and submission process.
- **Blue sections**: Indicates things that you still need to complete.

**HEADER/OPPORTUNITY INFORMATION**

Beneath the tracker bar is a section with the information about the FOA (such as the title, opportunity number and dates), it shows your unique workspace ID (WS00082729) and identifies the workspace owner.

**NAVIGATION TABS**

The available tabs will vary by agency. For most submissions, you’ll see FORMS, PARTICIPANTS, ACTIVITY, DETAILS. We’ll review these one at a time.

**APPLICATION PACKAGE FORMS**

The rest of the page is where you will add forms to and complete the forms for the application. A series of boxes on the left lists the forms, which you can check or uncheck to include or remove them from the proposal. We’ll review this in the next section.
COMPLETING THE FORMS

The process of completing the workspace forms is not significantly different from completing the Legacy Adobe package.

Below is information to help you navigate these pages and a few things that you need to be aware of.

<table>
<thead>
<tr>
<th>INCLUDE IN PACKAGE</th>
<th>the first column has a list of boxes you can check or uncheck to include or remove an optional form set from the application.</th>
</tr>
</thead>
<tbody>
<tr>
<td>FORM NAME</td>
<td>Clicking on the Form Name, opens a preview window of the form.</td>
</tr>
<tr>
<td>REQUIREMENT</td>
<td>Mandatory forms are listed first, followed by the optional forms.</td>
</tr>
<tr>
<td>FORM STATUS</td>
<td>• [---]: A form that has not been accessed yet.</td>
</tr>
<tr>
<td></td>
<td>• [In Progress]: A form that has been accessed, but the data entered does not pass the validation check.</td>
</tr>
<tr>
<td></td>
<td>• [Passed]: A completed form that has completed (passed) they system validation check.</td>
</tr>
<tr>
<td>LAST UPDATE DATE/TIME</td>
<td>Self-explanatory: This shows the last time a section was updated.</td>
</tr>
<tr>
<td>LOCKED BY</td>
<td>This is blank unless the listed user has locked the form.</td>
</tr>
</tbody>
</table>
In the Actions column to the far right, you will select from several different options to enter information into your application.

**LOCK**: Use this to prevent a form from being updated while someone is using it. The system prompts you to lock or **UNLOCK** the form.

**DOWNLOAD**: This allows you to download a PDF of the form to your workstation for completion offline at your convenience or send to someone else to complete. After completing a form offline, use the **UPLOAD** function to add the completed form to the application. These forms are similar to the Legacy Adobe forms.

**REUSE**: You’ll be able to use this option once you have completed a similar form in another workspace. You can reuse the information from an existing form in a previous workspace. You are asked to confirm that you want to reuse a form, and then are taken to the REUSE WORKSPACE FORM to search for the form you want to reuse. Not available for all forms.

- The REUSE search results show the application filing name, workspace status, FOA, the date of the last update and a preview option.
- Once you select the form to reuse, it is imported to your current workspace, replacing the blank form with and it will update that form’s status to PASSED.
- Use the webform option, if you need to tweak the information in the form.

**WEBFORM**: This is an enhanced online interface.

- Hovering over a field will give you information or instructions about completing that field.
- If enter invalid information in a field it is highlighted yellow and a red error notation appears.
- You can check for errors as you work. The errors appear at the top of the page with a link to the field that has an error.
- There is an auto save feature (every five minutes), but you should save manually after updating a page.
WORKSPACE ACTIONS (CONT.)

- When someone is editing a form, it is locked to other users. When you exit a form the system asks if you want to unlock the form (releasing it for another use to edit) or keep the form locked (if you still need to make changes and do not want someone to undo what you’ve done.) when a form is locked, the Locked by field will let you know who to contact if you need to make changes.

When uploading an attachment, Workspace scans for viruses and file name conventions.

SUBMITTING YOUR APPLICATION

- Only the AOR has the ability to submit applications. In most cases, the AOR will be your ORA Authorized Official.
- When you click “Sign and Submit,” you are prompted for your Grants.Gov password, not your Commons password. Upon submission, you’ll receive the Grants.Gov confirmation emails, as you would for the Legacy packages.
- After submitting, all edit options are disabled.
- The Reopen option is available for the workspace owner and the AOR after submission but should not be used unless by request of the AOR.

CHANGED/CORRECTED APPLICATIONS

Consult the ORA official who will work with you on the Changed/Corrected application about what steps need to be taken in Workspace. We will update the guide with detailed instructions, once we have tested this with a real-time submission.
 PARTICIPANTS TAB

From this tab, you will be able to: (1) add Participants to your workspace, (2) remove users from your workspace, (3) manage what areas of your workspaces, participants can access, and (4) transfer workspace ownership to other users with the workspace owner role.

Adding Participants

The way you add participants to your workspace depends on if they are internal to JHU or external users.

1. **Add by the username**: Use this to add external (non-JHU) participants to your workspace. You need their username before you can exercise this option.
2. **Search the list of the organization’s registered users.** To add them, check the Add button in the action column, and then click Save button at the bottom of the page. If you do not press save, they will not be added. Saving the form takes you back to the Manage Workspace screen and you can check the Participants tab to see that it has been updated with whoever you just added.

![MANAGE WORKSPACE](image)

**MANAGING ACCESS**

Adding a participant, grants them access to All Forms including Budget, by default. You can limit access to **Non-Budget forms** and **Subform(s) Only**. If you choose to limit someone’s access to Subforms, the available Subforms options are shown.

NOTE: Both the requester and the user being added as a participants receive an email confirmation once a new user is added to the workspace.
ACTIVITY TAB

This lists **every** action taken on the form by **every** user.

DETAILS TAB

The Detail tab is where you can track the submission. This will be blank until you have submitted the application.
GRANTOR IMAGE TAB

Currently, only available for NIH and AHRQ applications.

It allows you to print a PDF version of that application. You can take advantage of this to send to the PI for review and approval before submitting to ORA. Unfortunately, it does not currently include the file uploads/attachments. That will be added in a later update. **In the meantime, it might be best to add them as a participant.**

PREVIEW GRANTOR VALIDATION

You can run agency validation checks for **NIH and AHRQ applications**. It sends the workspace to the agency system to confirm whether the application meets validation checks or not.

The page doesn’t automatically update. Refresh the page to get the results of the validation check in a pop-up window.
STILL HAVE QUESTIONS?

GRANTS.GOV RESOURCES

- Video on Roles and Access: https://www.youtube.com/watch?v=zWSjX_Lfmc/
- VIDEOS (YouTube channel): https://www.youtube.com/channel/UCc7tRM0vKkTMpxucO7iYPzQ.

JHU RESOURCES

- ORIS Web Site: Workspace FAQ's: https://research.jhu.edu/oris/workspace-learning-resources/.

WHAT PROGRAMS ARE COMPATIBLE WITH WORKSPACE?

ORA recommends that you use Mozilla Firefox, but Workspace supports:

- MICROSOFT INTERNET EXPLORER (IE)
- MOZILLA FIREFOX
- GOOGLE CHROME
- APPLE SAFARI.

Adobe Reader versions:

- ADOBE READER DC (CONTINUOUS) VERSION 2015.010.20060 OR LATER
- ADOBE READER DC (CLASSIC) VERSION 2015.006.30121 OR LATER
- ADOBE READER VERSION 11.X
- ADOBE READER VERSION 10.X
- ADOBE READER VERSION 9.X.

PROGRAM COMPATIBILITY (CONT.)

Adobe Acrobat:

- ADOBE ACROBAT 9.X
- ADOBE ACROBAT 10.X
- ADOBE ACROBAT 11.X.

For more information on compatibility, visit: https://www.grants.gov/web/grants/applicants/adobe-software-compatibility.html.

TIPS (in progress!)

- Each time you complete a form, check it for errors and save BEFORE closing it.