



Grants Management System User guide

Revised: February 13, 2019

Grants Management System (grants.cpb.org)

Contents

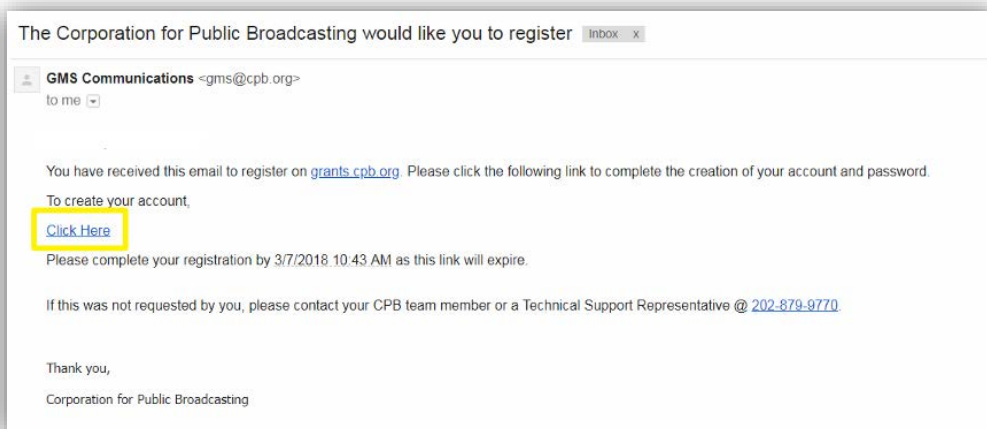
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Overview

Welcome to CPB’s Grants Management System (grants.cpb.org), also known as the portal. The portal allows organizations to respond to RFPs, view active agreements and submit deliverables via the web. In order to gain access to the portal, you must be invited by a CPB Project Officer. In addition, for each RFP or Agreement, the CPB Project Officer on that project will need to take additional steps to ensure you have appropriate access.

Accessing CPB’s Grants Management System

Once you’ve been invited to access the Grants Management System, you’ll receive an email with a temporary link allowing you to register.



This link expires after 48 hours. Please register as soon as possible upon receiving the invitation. Follow the link to the login page.

Fill in the fields and click 'Create User'.

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Agreements | Register

First Name:

Last Name:

Email Address (Username):

Password: ?

Confirm Password:

Create User

Once you are in the system, if you do not see the Agreement or RFP you are looking for, contact the CPB Project Officer for that project. See below for further instructions on RFPs and Agreements.

Agreements

The agreements tab is a summary page with several sections showing information on CPB agreements you are working on and have been granted access to view on the portal. If you believe an agreement or other record is missing, contact the CPB Project Officer listed on that agreement.

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Agreements | Open Grants and RFPs | Concept

Agreements

Welcome to the CPB's Grants Management System

The CPB's mission is to exceed customer expectations by delivering on commitments with proven value added solutions and thought leadership. We do so by creating an organizational culture that fosters personal and professional growth. We empower our team members to focus on service excellence.

Executed Agreements

ID	Project Title	Project Officer	Start Date	End Date
21562-RAD	Sample Project 1	Erin Day	9/1/2015	9/30/2018
34533-RAD	Sample Project 2	Jacque Gales Webb	3/1/2017	2/28/2018
34847-RAD	Sample Project 3	Jeff Luchtinger	1/1/2018	12/31/2022

Agreements in Drafting

ID	Project Title	Start Date	Status
34579-TVP	Sample Project 4	7/1/2017	Information Required
34600-EDU	Sample Project 5	10/1/2017	Submission Complete

Pending Disbursements

Anticipated Due Date	Agreement	Amount	Status
9/30/2017	34533-RAD	\$10,000	Processed
9/15/2017	23074-TVP	\$15,000	Pending

Upcoming Deliverables

Title	Agreement	Disbursement	Due	Status
Narrative - Interim	34533-RAD	9/30/2017	5/31/2017	Pending
Contract Execution - Execution Documents	34526-TVP	6/30/2017	6/30/2017	Pending
Financial - Interim	34526-TVP	3/31/2018	7/31/2017	Pending
Narrative - Interim	34533-RAD	9/30/2017	8/31/2017	Pending
Narrative - Interim	34533-RAD	9/30/2017	11/1/2017	Pending

Executed Agreements – Executed agreement you have been given access to. Click the agreement ID to see project details.

Executed Agreements

ID	Project Title	Project Officer	Start Date	End Date
21562-RAD	Sample Project 1	Erin Day	9/1/2015	9/30/2018
34533-RAD	Sample Project 2	Jacque Gales Webb	3/1/2017	2/28/2018
34547-RAD	Sample Project 3	Jeff Luchsinger	1/1/2018	12/31/2022

Agreement Details

ID: 21562-RAD
 Project Title: Regional/Jurisdiction Collaborations - Natural State/Novo
 Description:
 Project Officer: Karyl Galsworth
 Project Manager:
 Department: Acadia
 Agreement Amount: \$
 Start Date: 9/01/2015
 End Date: 09/30/2018

Disbursements

Date	Agreement	Amount	Status
9/26/2015	21562-RAD		Processed

Associated Deliverables

Title	Disbursement	Description	Type	Due	Status
No records were found.					

Upcoming Deliverables – upcoming and overdue deliverables. Color coding shows overdue deliverables.

Upcoming Deliverables

Title	Agreement	Disbursement	Due	Status
Narrative - Interim	34533-RAD	9/30/2017	5/31/2017	Pending
Contract Execution - Execution Documents	34526-TVP	6/30/2017	6/30/2017	Pending
Financial - Interim	34526-TVP	3/31/2018	7/31/2017	Pending
Narrative - Interim	34533-RAD	9/30/2017	8/31/2017	Pending
Narrative - Interim	34533-RAD	9/30/2017	11/1/2017	Pending

Legend:

- Orange** = 90+ days overdue. Contact CPB Project Officer for Resolution.
- Yellow** = Overdue by less than 90 days. Submit as soon as possible.
- No Highlight** = Not past due date.

How to Submit Deliverables

Click on the deliverable title to open the submission form. Click 'Add File'.

File uploads: Budgets should be in Excel. All other documents should be in PDF. There is a file size limit of 10 MB.

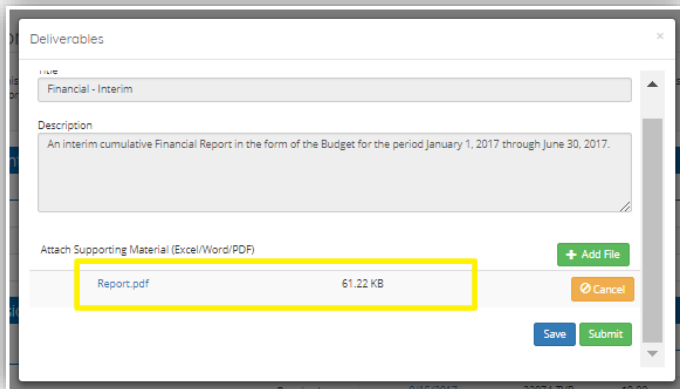
The screenshot shows the 'Upcoming Deliverables' interface. At the top, a table lists several deliverables. A blue box highlights the 'Upcoming Deliverables' title. A blue arrow points from the 'Narrative - Interim' title in the table to the corresponding form below. A callout bubble points to the title with the text 'Click on Title to open submission form.' The form itself has a 'Title' field containing 'Narrative - Interim', a 'Description' field with a text area, and an 'Attach Supporting Material (Excel/Word/PDF)' section with an '+ Add File' button. A callout bubble points to this button with the text 'Click 'Add File''. Below the form are 'Save' and 'Submit' buttons.

Title	Agreement	Disbursement	Due	Status
Narrative - Interim	34533-RAD	9/30/2017	5/31/2017	Pending
Contract Execution - Execution Documents	34526-TIP	9/30/2017	6/30/2017	Pending
Financial - Interim	34520-TP	3/1/2018	7/31/2017	Pending
Narrative - Interim	34533-RAD	9/30/2017	8/31/2017	Pending
Narrative - Interim	34533-RAD	9/30/2017	11/1/2017	Pending

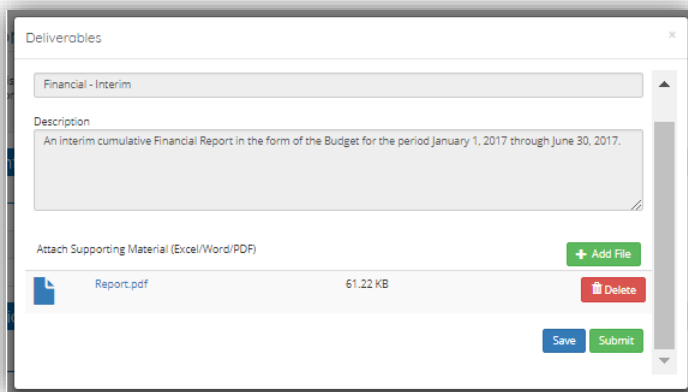
Navigate to the file on your computer. Select the file and click 'Open'.

The screenshot shows a Windows File Explorer window titled 'Open'. The address bar shows the path 'My Projects > CPB Project'. The file list shows a single file named 'Report.pdf' with a date modified of '4/7/2017 9:53 AM' and a type of 'Adobe Acrobat D...'. The 'File name' field at the bottom contains 'Report.pdf' and the file type is set to 'All Files'. A blue arrow points to the 'Open' button with a callout bubble containing the text 'Navigate to file and click 'Open''.

Your file will appear in the deliverable window. You may add more files, cancel this file, save for later, or submit.



Once saved, you may add more files, delete this file, save for later, or submit.

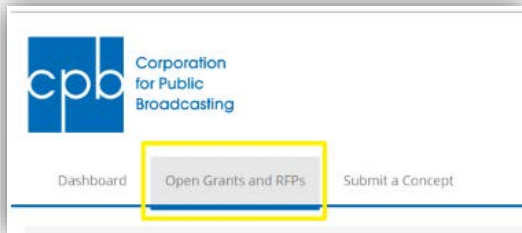


Once submitted, the deliverable will no longer appear under 'Upcoming Deliverables'.

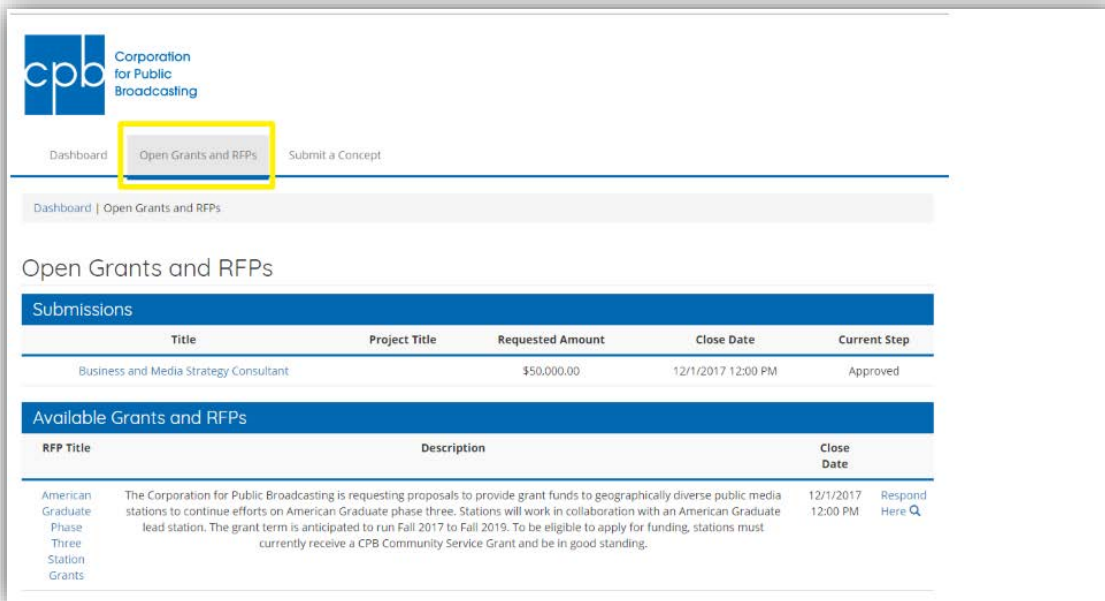
RFPs

To submit a proposal in response to an RFP review the RFP's application instructions on the [CPB website](#) for details on whom you should contact to request access. Once you've been granted access, follow the instructions below.

Click on Open Grants and RFPs.

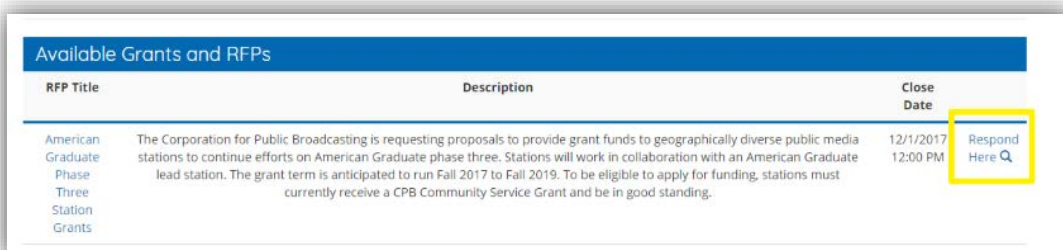


You will see Submissions and Available Grants & RFPs.



Submissions: Proposals you've submitted. Submitted proposals can no longer be edited.

Available Grants and RFPs: RFPs you have access to that are available to respond to. Click 'Respond Here' to start working on a new proposal, or to continue working on a proposal in progress.



A response form will open. Fill in all fields.

The screenshot shows a web form titled "RFP Responses" with the following fields:

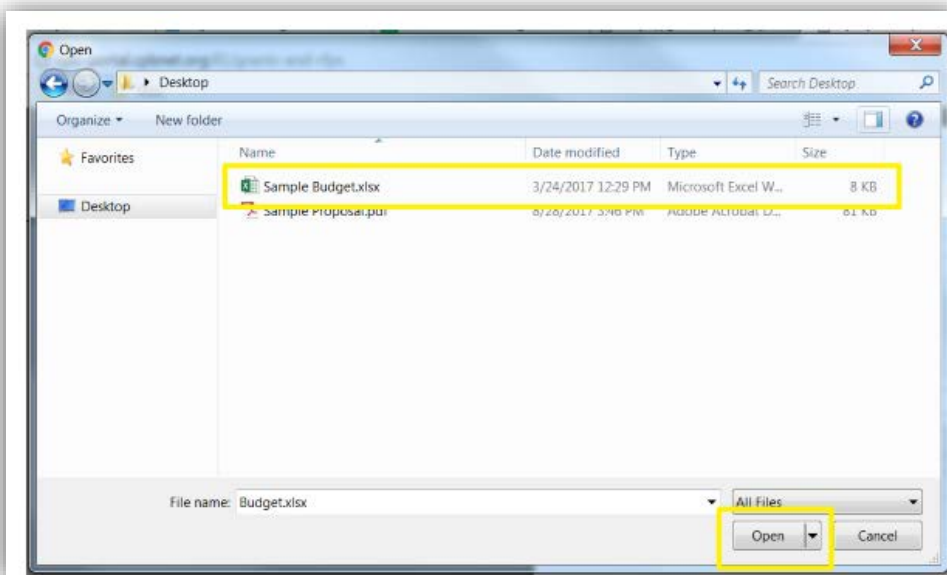
- Project Title *
- Contact *
- Description *
- Revenue Raised * (with a dollar sign icon)
- Requested Amount * (with a dollar sign icon)
- Total Budget * (with a dollar sign icon)
- Proposed Start Date * (with a calendar icon)
- Proposed End Date * (with a calendar icon)

Attach the budget (Excel file) and proposal (PDF document). To attach a document, click on Add file.

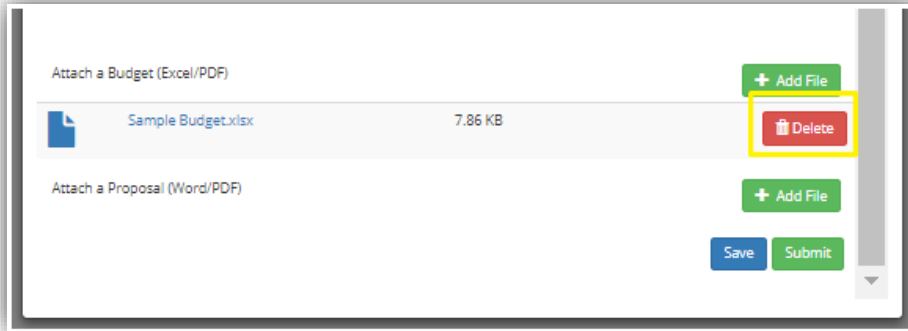
The screenshot shows the attachment section of the form with the following elements:

- Attach a Budget (Excel/PDF) with a green "+ Add File" button highlighted in yellow.
- Attach a Proposal (Word/PDF) with a green "+ Add File" button.
- Save and Submit buttons at the bottom.

In the window that opens, navigate to the file on your computer, select the file and click open.



Once a file is uploaded, you'll have the option to delete it if necessary.



You may save the proposal to continue working on it later. Be sure to click 'Submit' when your proposal is complete.



Note: We recommend submitting one (1) budget file, and one (1) proposal file, but you may submit up to two (2) each, should you need to. Each file may not exceed 10MB in size, and file names may not contain the following special characters: ~ " # % & * : < > ? / \ { | }

Account/Password Management

Click 'Manage Account' to update your password.

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Manage Account Logout

Agreements Open Grants and RFPs Concept

Agreements | Organization Management

Organization Management

Details	Primary Address
Account Name Test Account	Street 1 1234 Sesame St
Primary Contact Karyn Dubravetz	Street 2
Phone 202-555-5555	Street 3
Fax	City Washington
Website http://testaccount.test	State/Province DC
<input type="checkbox"/> Station	Post Office Box

Change Your Password

Password:

New Password:

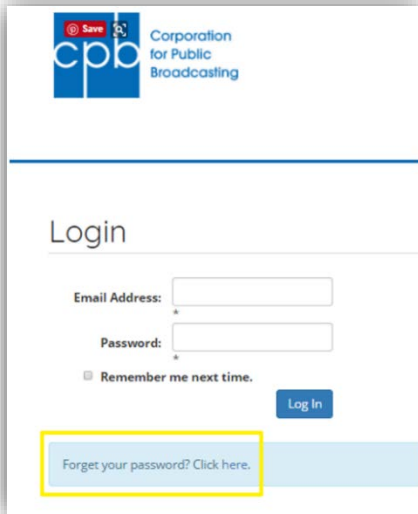
Please enter a password at least 6 characters long, containing a number and one special character.

Confirm New Password:

[Change Password](#)

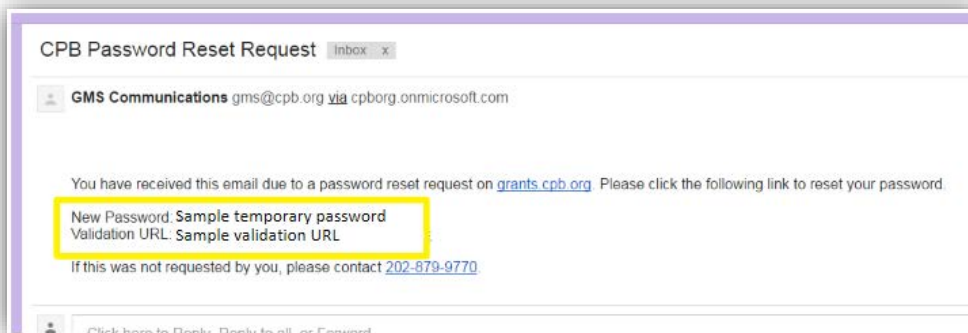
Requesting a New Password

If you forget your password, click the 'Forget your password?' link on the login screen at grants.cpb.org. You will be prompted to enter your email address.

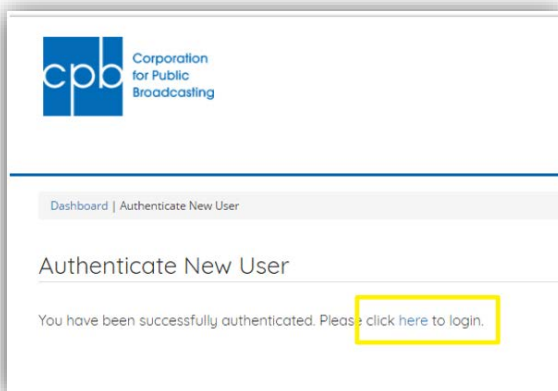


The screenshot shows the CPB Corporation for Public Broadcasting login page. At the top left is the CPB logo with a 'Save' icon. Below the logo is the text 'Corporation for Public Broadcasting'. The main heading is 'Login'. There are two input fields: 'Email Address:' and 'Password:'. Below the password field is a checkbox labeled 'Remember me next time.' and a blue 'Log In' button. At the bottom left, a light blue box contains the text 'Forget your password? Click here.', which is highlighted with a yellow rectangle.

You will then receive an email with a Validation URL and temporary password. Click the Validation URL.



You will be taken to a user authentication confirmation page, below. Click 'please click here to login'.



The screenshot shows the CPB Corporation for Public Broadcasting user authentication confirmation page. At the top left is the CPB logo with the text 'Corporation for Public Broadcasting'. Below the logo is a breadcrumb trail: 'Dashboard | Authenticate New User'. The main heading is 'Authenticate New User'. Below the heading, the text reads 'You have been successfully authenticated. Please [click here to login](#).' The link 'click here to login' is highlighted with a yellow rectangle.

This will return you to the login screen. Enter your email address and the temporary password that was emailed to you.

The image shows a screenshot of the CPB (Corporation for Public Broadcasting) login page. At the top left is the CPB logo. Below it, the word "Login" is displayed. There are two input fields: "Email Address:" and "Password:", each with a small asterisk below it. A checkbox labeled "Remember me next time." is positioned below the password field. A blue "Log In" button is located to the right of the password field. At the bottom of the login form, there is a light blue link that says "Forget your password? Click here." Overlaid on the right side of the login form is a white notification box with a yellow border. The notification text reads: "You have received this email due to a password reset request on [grants.cpb.org](\"#\"). Please click the following link to reset your password. New Password: **Sample temporary password** Validation URL: **Sample validation URL** If this was not requested by you, please contact [202-879-9770](\"#\")." The new password and validation URL are highlighted in yellow in the original image.

Once back in the system, click on 'Manage Account' to create a new permanent password.

Trouble Shooting/FAQs

I am having trouble logging in.

1. Be sure you are using the same email address to log in that you used to create your account. Your CPB Project Officer can confirm which email address you should be using.
2. If you clicked the 'forgot my password link', be careful if you are copying and pasting your temporary password. It is possible to copy an extra space after the password. Try manually typing in the temporary password.

I have logged in, but I don't see the RFP I am looking for.

1. Make sure you have requested access for the RFP. CPB staff needs to add you to the RFP internally so that it appears in the Grants Management System when you log in. Check the [CPB website](#) to see who can give you access.
2. Check the [CPB website](#) to confirm the RFP is still open. Once an RFP closes, it will no longer appear under 'Available Grants & RFPs'.

I see 2 RFPs I am interested in. Do I need to request access to both?

Yes. Check the application instructions on each RFP to see who from CPB can give you access to each one. If you have never accessed the Grants Management System before, you will also need to create a user account.

I have requested access to an RFP in the past. Now I would like access to another one. Do I need to request access again?

Yes. Even if you requested access earlier and have logged into the system, someone will still need to add you to each RFP internally so that it appears in the Grants Management System when you log in.

If you have any questions or problems with the Grants Management System, please contact your CPB Project Officer, or call the CPB IT Helpdesk at 202-879-9700.