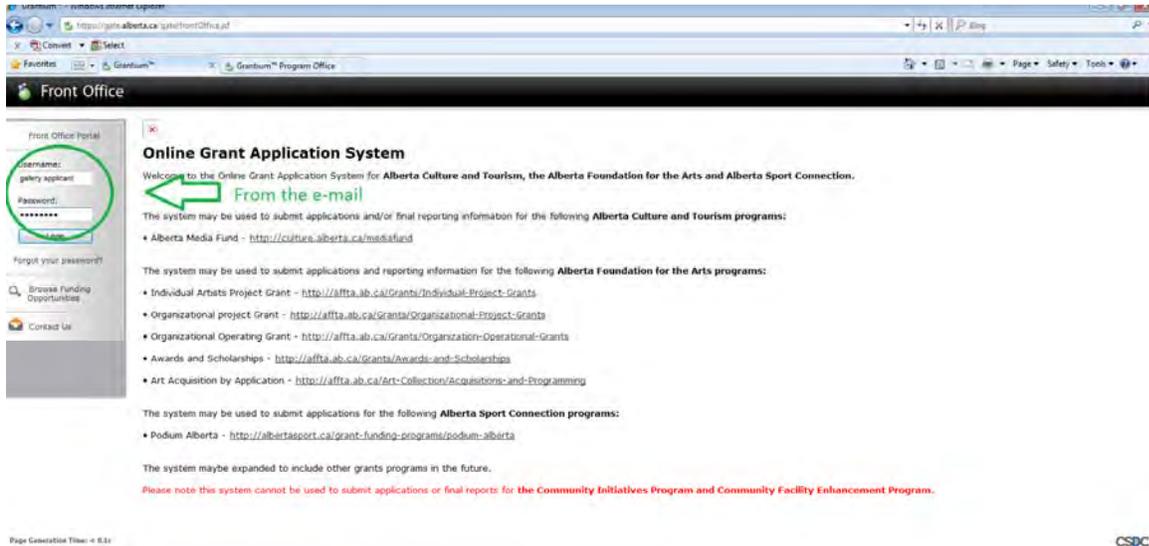


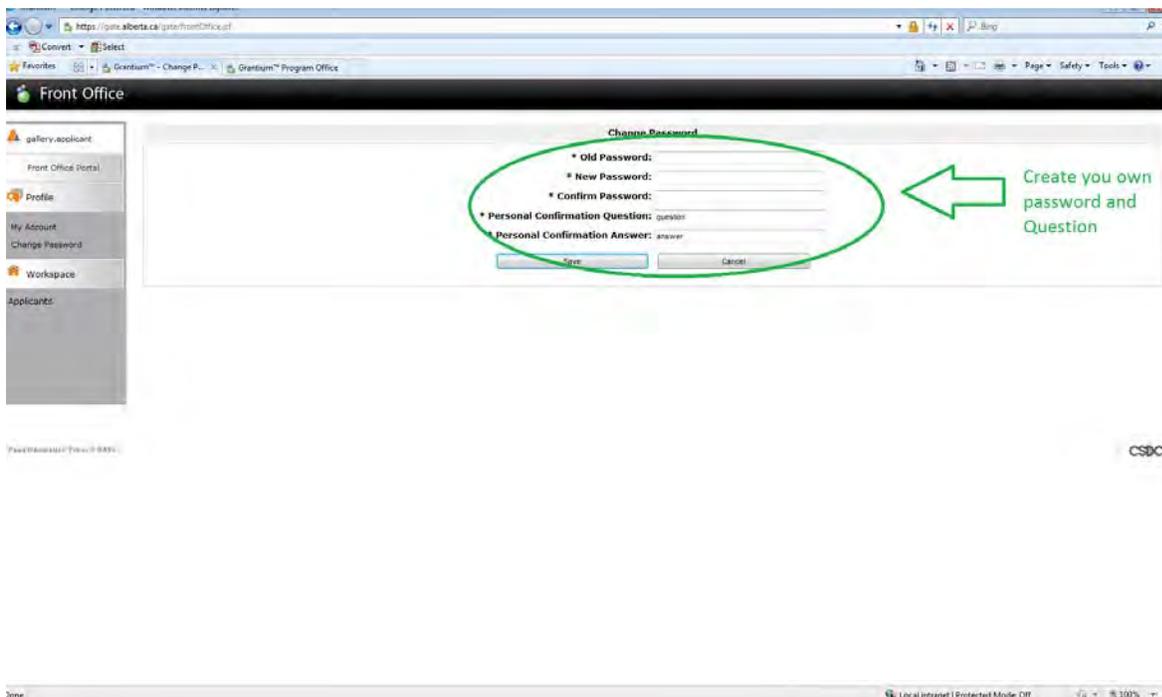
How to use GATE to apply for the AFA Public Art Galleries Operation Grant

(Note: User Profile must be completed before using this guide)

1. Log In using the username and password sent to you.

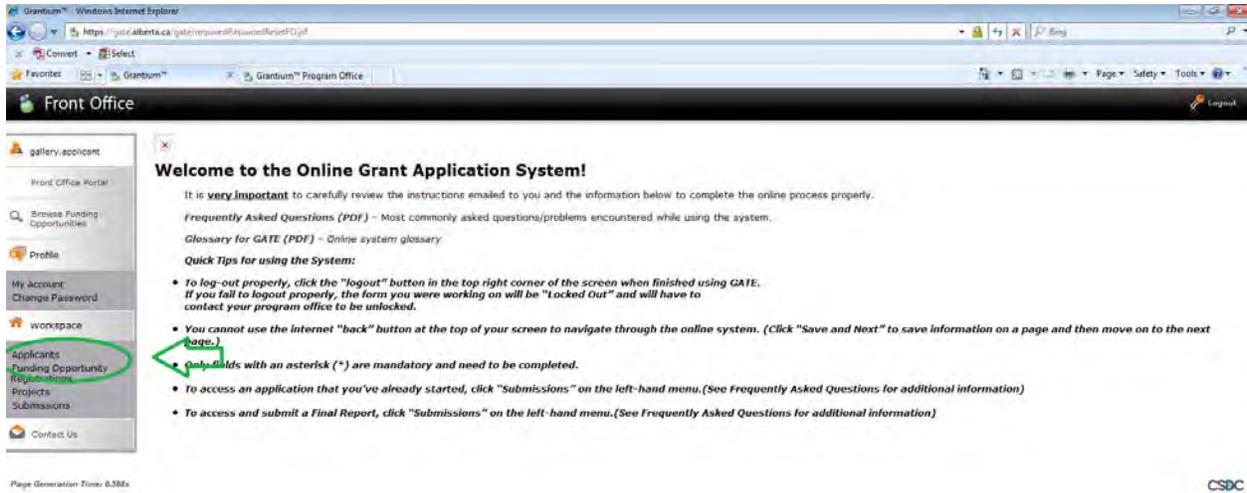


2. Change Password:

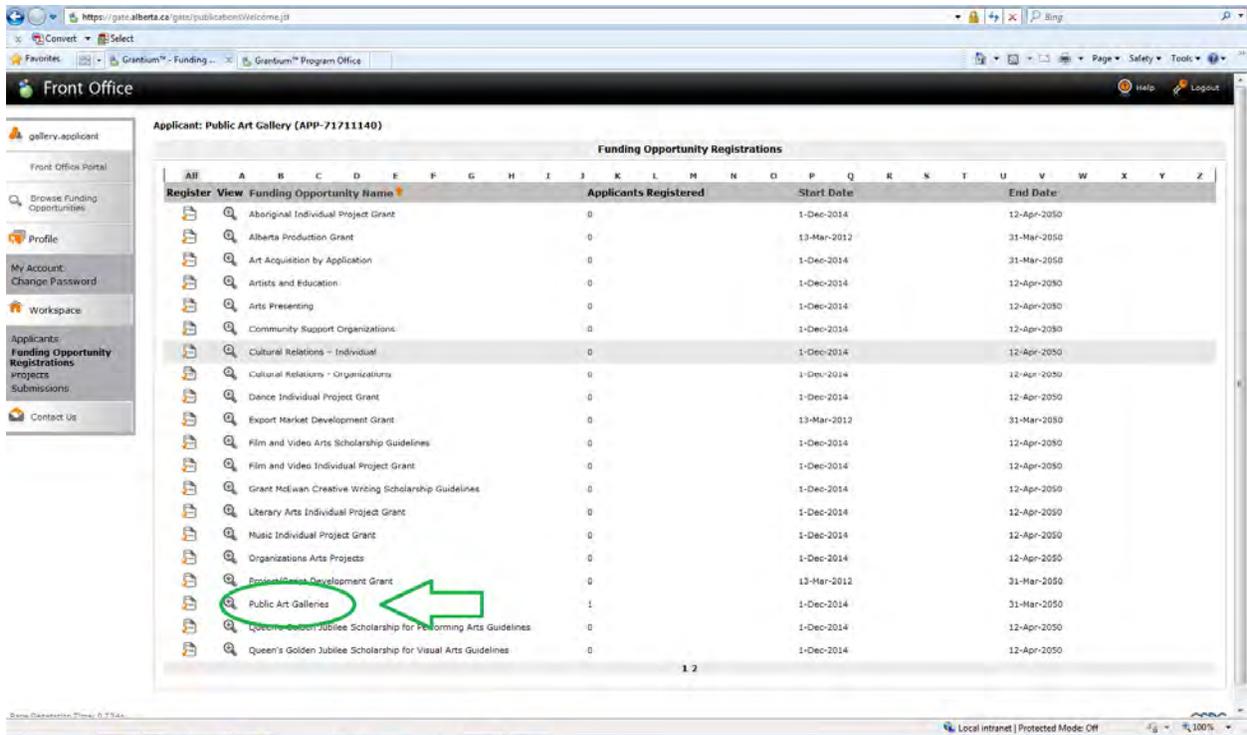


3. Register for Funding Opportunity.

This step will link your organization to a grant (or funding opportunity



4. This is what the page should look like. Scan for Public Art Galleries



5. Click on the small square icon with the yellow plus sign to the left of the Public Art Galleries

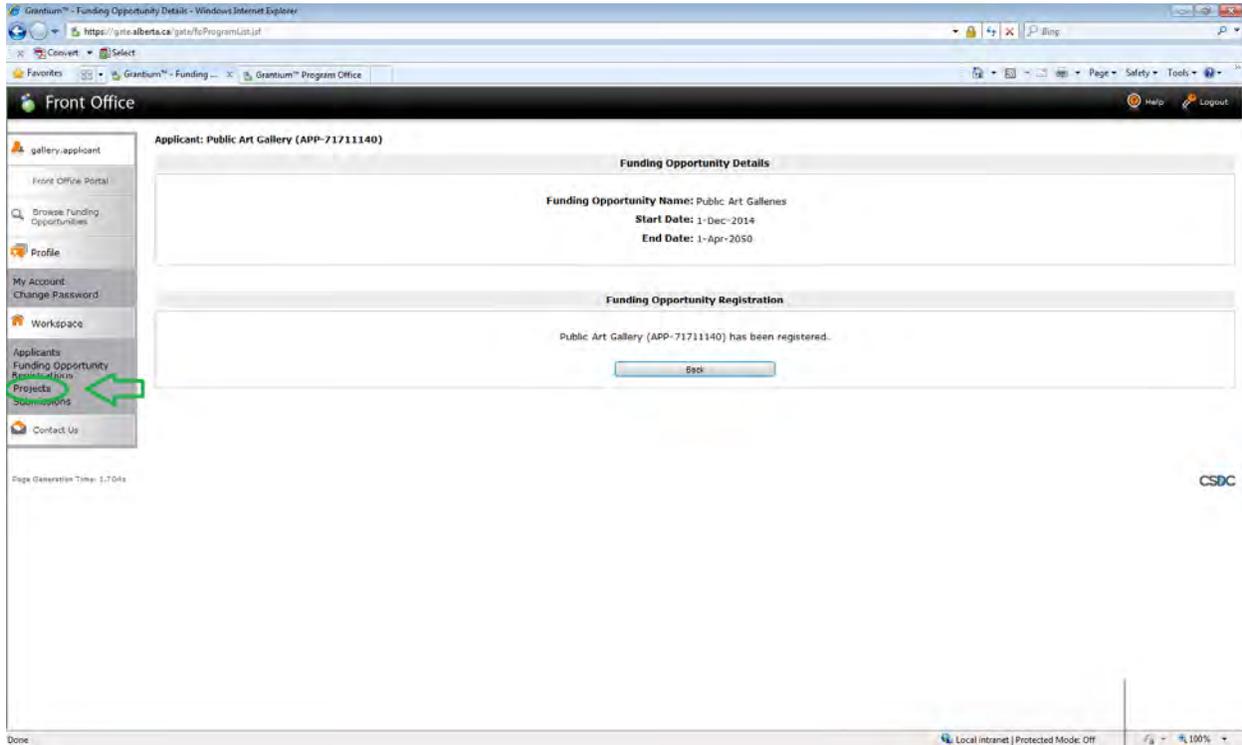
The screenshot shows the 'Front Office' web application interface. The user is logged in as 'gallery.applicant'. The main content area displays a table of 'Funding Opportunity Registrations' for the applicant 'Public Art Gallery (APP-71711140)'. The table has columns for 'Register View', 'Funding Opportunity Name', 'Applicants Registered', 'Start Date', and 'End Date'. A green arrow points to a small square icon with a yellow plus sign located to the left of the 'Public Art Galleries' row in the table.

| Register View | Funding Opportunity Name | Applicants Registered | Start Date | End Date |
|---------------|---|-----------------------|-------------|-------------|
| | Aboriginal Individual Project Grant | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Alberta Production Grant | 0 | 13-Mar-2012 | 31-Mar-2050 |
| | Art Acquisition by Application | 0 | 1-Dec-2014 | 31-Mar-2050 |
| | Artists and Education | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Arts Presenting | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Community Support Organizations | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Cultural Relations - Individual | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Cultural Relations - Organizations | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Dance Individual Project Grant | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Export Market Development Grant | 0 | 13-Mar-2012 | 31-Mar-2050 |
| | Film and Video Arts Scholarship Guidelines | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Film and Video Individual Project Grant | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Grant McEwan Creative Writing Scholarship Guidelines | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Literary Arts Individual Project Grant | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Music Individual Project Grant | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Organizations Arts Projects | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Project/Script Development Grant | 0 | 13-Mar-2012 | 31-Mar-2050 |
| | Public Art Galleries | 1 | 1-Dec-2014 | 31-Mar-2050 |
| | Queen's Golden Jubilee Scholarship for Performing Arts Guidelines | 0 | 1-Dec-2014 | 12-Apr-2050 |
| | Queen's Golden Jubilee Scholarship for Visual Arts Guidelines | 0 | 1-Dec-2014 | 12-Apr-2050 |

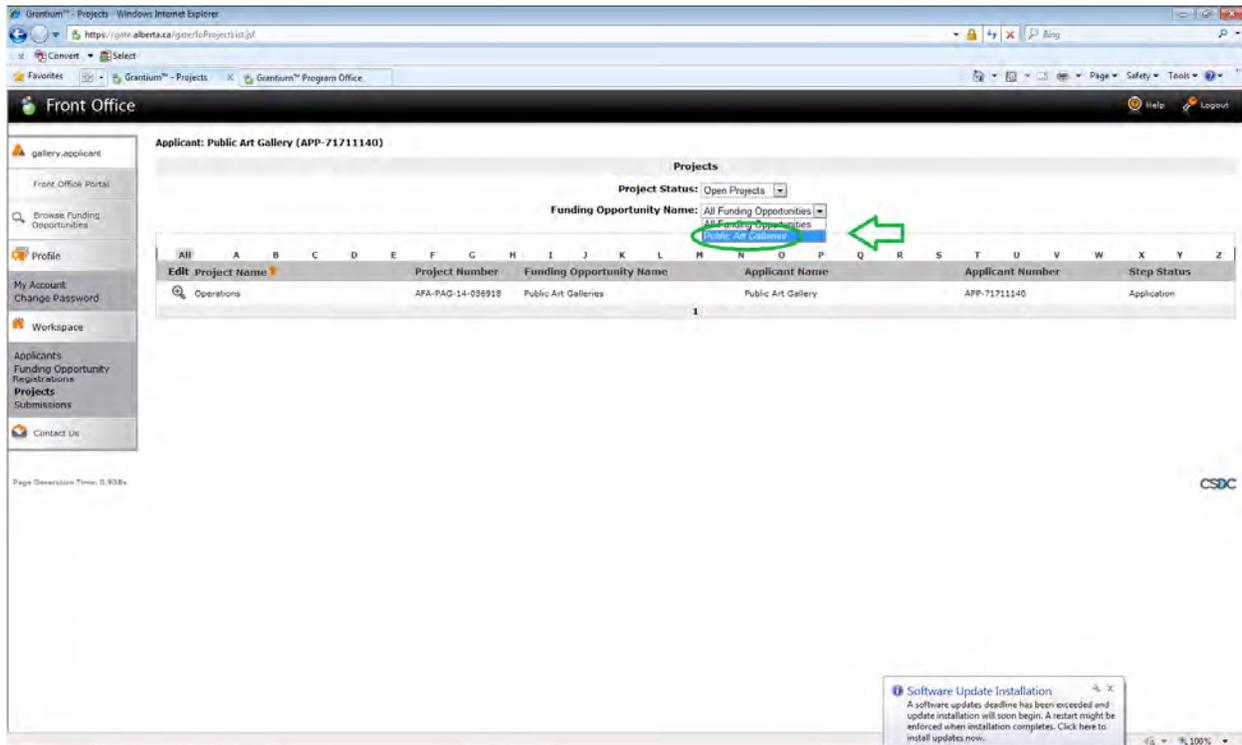
6. Success! (note your application number)

The screenshot shows the 'Front Office' web application interface. The user is logged in as 'gallery.applicant'. The main content area displays the 'Funding Opportunity Details' for the applicant 'Public Art Gallery (APP-71711140)'. The details section shows the 'Funding Opportunity Name: Public Art Galleries', 'Start Date: 1-Dec-2014', and 'End Date: 1-Apr-2050'. Below this, the 'Funding Opportunity Registration' section shows the message 'Public Art Gallery (APP-71711140) has been registered.' and a 'Back' button.

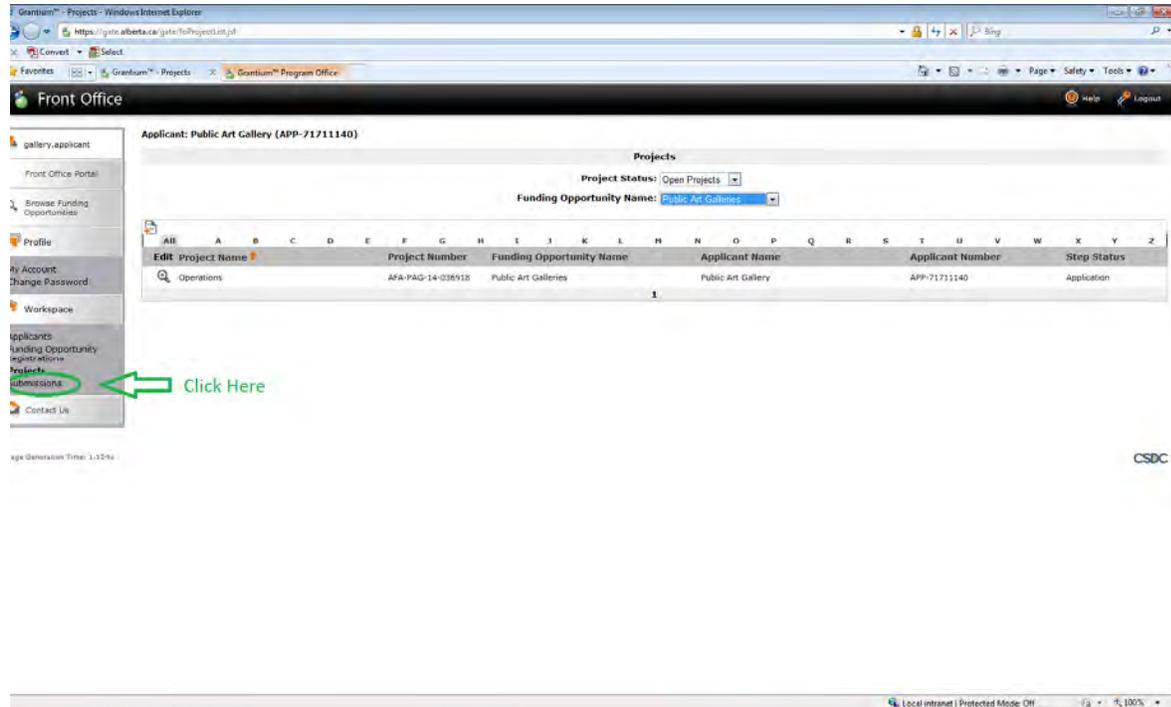
7. Now that you are registered for this grant, you may now apply for it. In gate language this is “creating a new project”. Use the side menu to click on “Projects”



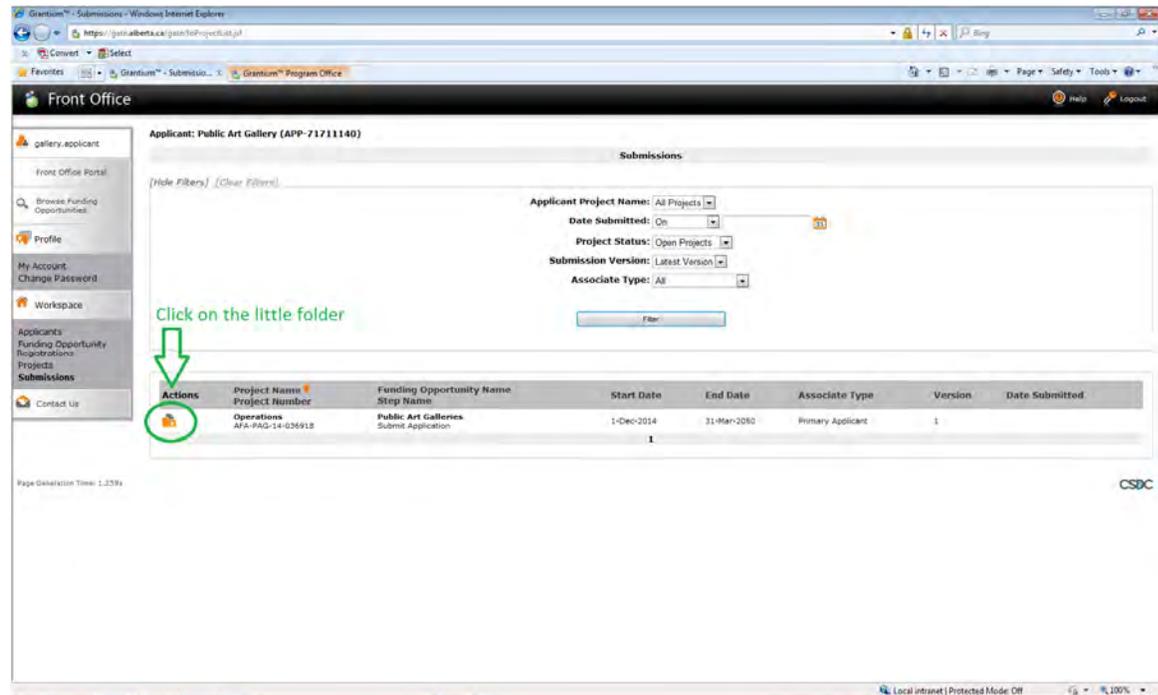
8. Select Public Art Galleries from the drop down menu. You have now created a new “project”



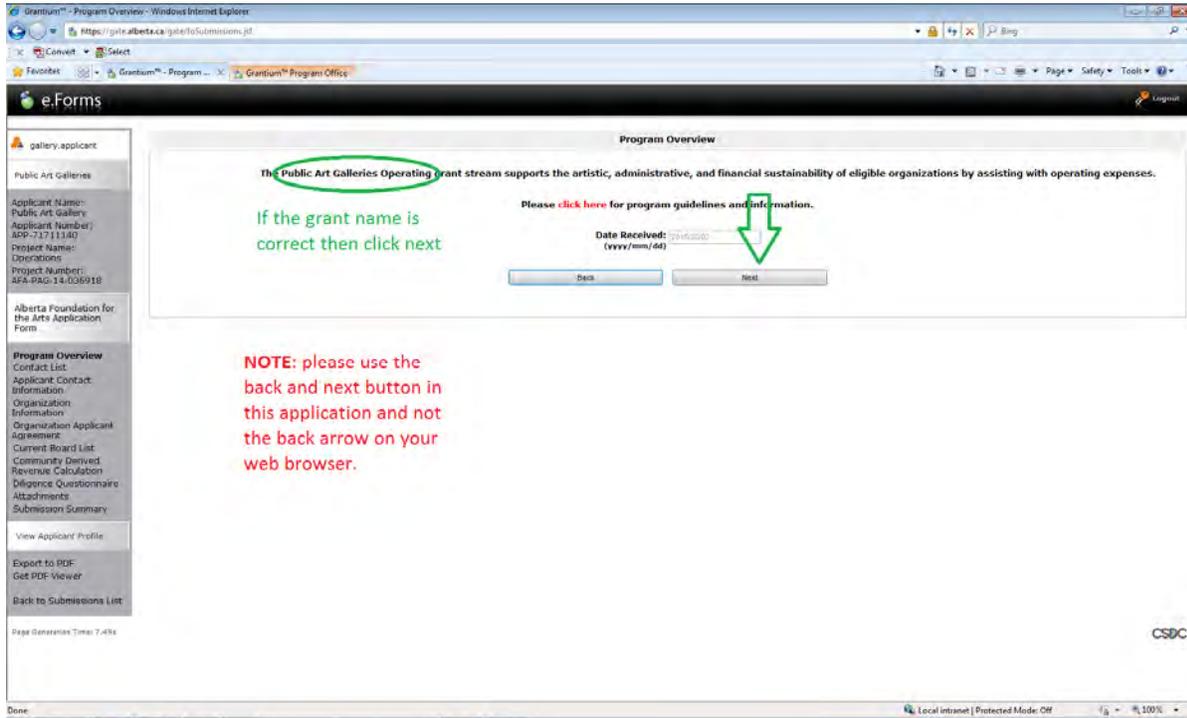
9. Now you have to fill in the details. In order to do that, please go to the side menu and click on “submissions” (this is also where you will click if you have to leave it partially filled in and need to return and finish it at a later time)



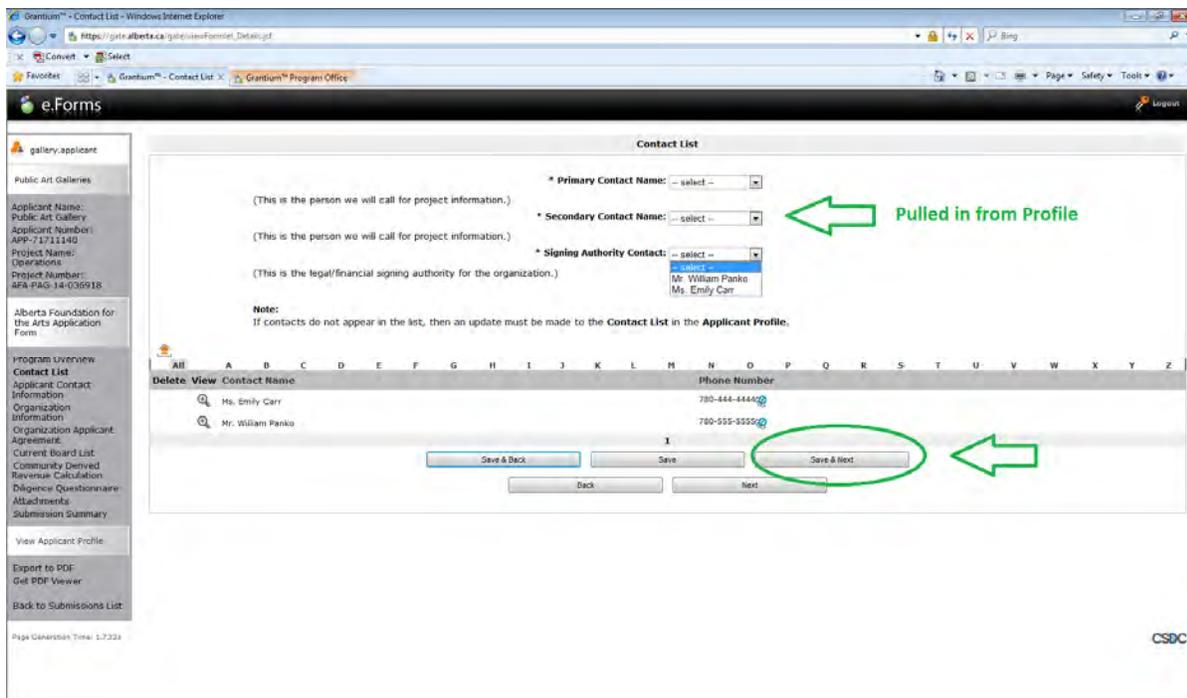
10. Now you need to open your project by clicking on the little yellow file folder with the arrow.



11. At last you are in the actual application for Public Art Galleries. Make sure that the name of the grant is correct



12. You will be asked for a contact person for this grant. The contacts will be pulled in from your profile, select the appropriate contact from the drop down lists. IF THIS INFORMATION IS INCORRECT, IT MUST BE CHANGED IN YOUR PROFILE. If correct click save and next



13. Your application profile comes up. Notice that all information has been autofilled from your profile. Any changes must be done in the profile and not on this page. Click Save and Next.

Applicant Contact Information

Updates to this information will not be reflected in the Applicant Profile. Update the Applicant Profile if required.

Applicant Address

* Address Line 1: 1 city square
Address Line 2:
Address Line 3:
* City: Edmonton
* Province: Alberta
* Postal Code: T5J 0A1
Country: Canada

Mailing / Delivery Address

Please ensure that the mailing address is correct for this application.

Address Line 1: 1 city square
Address Line 2:
Address Line 3:
City: Edmonton
Province: Alberta
Postal Code: T5J 0A1
Country: Canada

Save & Back Save Save & Next Back Next Check Spelling

Auto Filled

When Ready

14. Again this should autofill except for your CADAC registration number which you need to add.

Organization Information

Organization's Registered Name: Public Art Gallery

Note: Must match Provincial Registration name. If this is not correct, you must update the Applicant Profile (if applicable).

Common Name:
(if different from Legal Entity Name)

Alberta Registration Number: 1234564321
Alberta Registration Date: (yyyy/mm/dd)
CRA Registration Date: (yyyy/mm/dd)

Fiscal Year End
* Month: December
* Day: 31

CADAC Number:
(applicable only for PPAO, PAC, PASO)

Save & Back Save Save & Next Back Next Check Spelling

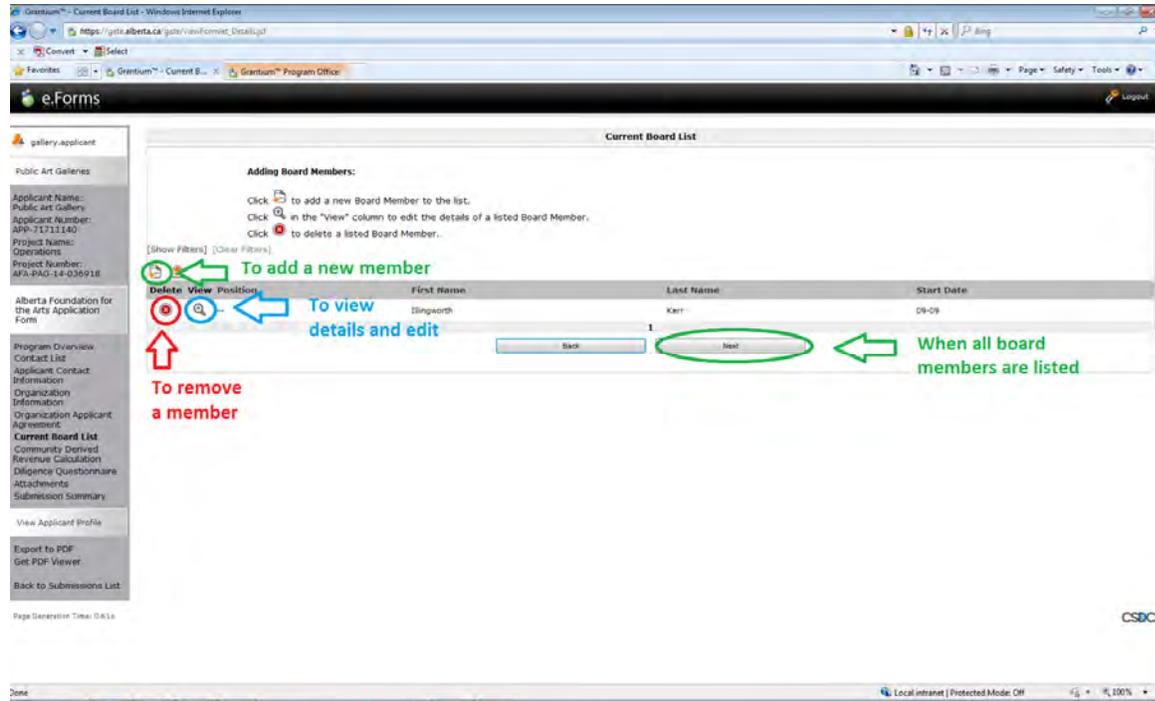
Please add

When complete

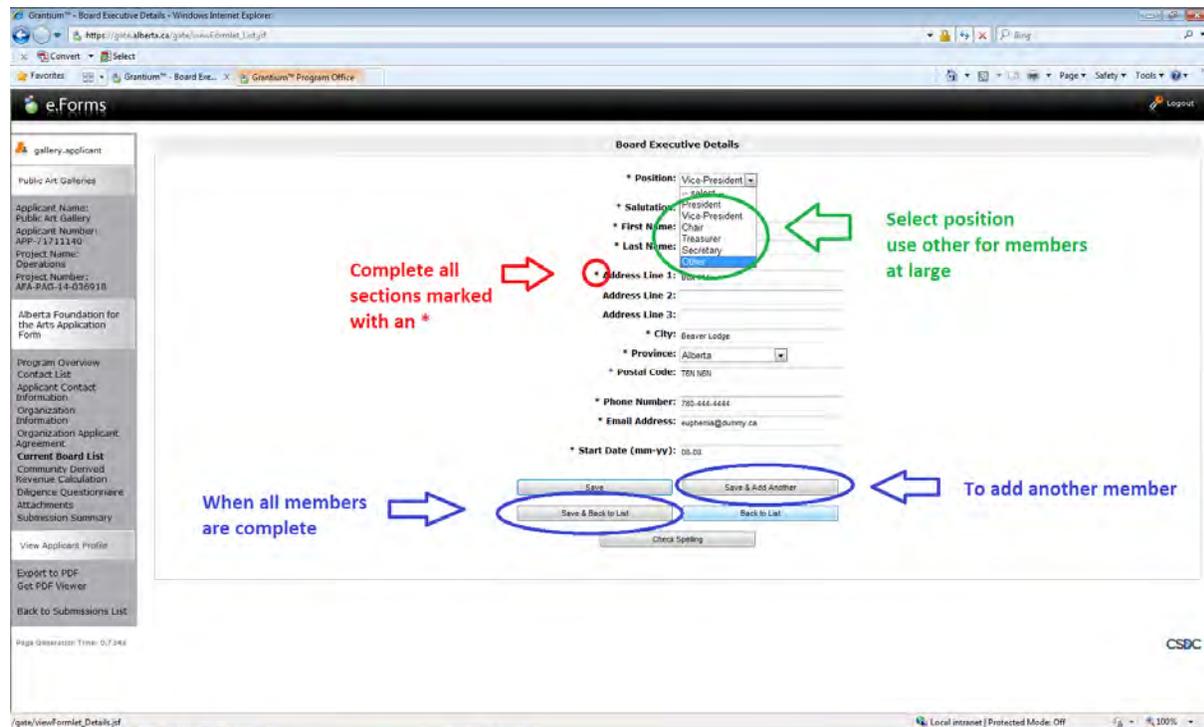
15. Next is your applicant agreement. Please note : This is reduced to fit on one screenshot the relevant section appears below.

16. Here is the section that must be filled in. Please note: this is in lieu of a signature

17. The Board List is next. Click on the little “plus” sign to add a new board member. The red x beside an existing name allows you to remove a member and the magnifying glass shows the details and allows you to edit the information.



18. When you click on the “plus” sign this is the page that appears. You need to complete one for each board member serving at the time of the application. Please fill in all mandatory fields.



19. Please add your ENTIRE board(not just the executive). When you are finished click next.

Current Board List

Adding Board Members:

Click to add a new Board Member to the list.
 Click in the "View" column to edit the details of a listed Board Member.
 Click to delete a listed Board Member.

[Show Filters] [Clear Filters]

| Delete | View | Position | First Name | Last Name | Start Date |
|--------|------|----------------|------------|-----------|------------|
| | | President | Tlingworth | Kerr | 09-09 |
| | | Vice-President | Euphemia | McNaught | 00-00 |

1

Back Next

When all members are listed click next

20. Now you get to calculate your Community Derived Revenue (CDR). Please note these numbers do not include projections. They have to reflect your latest 3 audited statements.

Community Derived Revenue Calculation

* Project Start Date: 20140000
 * Project Completion Date: 20140000
 * Final Report Due Date: 20150000

CADAC line references do not apply to CPAD applicants.

| | Year 1 | Year 2 | Year 3 - Most Recent |
|-----------------------------------|--------|--------|----------------------|
| * Total Revenue | | | |
| * Total Community Derived Revenue | | | |

Community Derived Revenue

Grant Amount Reported: \$0.00

Back Next

Check Saving

This is the date on your audited financial statement

Note: all fields should correspond to the appropriate lines in your CADAC form

Click on the small calendar. Select the year from the drop down list first, then the month and finally the day.

These figures will auto calculate when you save the page

21. Once the page is complete and saved the bottom three rows of figures will self-calculate

Community Derived Revenue Calculation

CADAC line references do not apply to CPAO applicants.

| Fiscal Year End | Year 1 2012/03/31 | Year 2 2013/03/31 | Year 3 - Most Recent 2014/03/31 |
|--|----------------------|----------------------|---------------------------------------|
| * Total Expenditure (Line 8600 from CADAC form) | \$500,000.00 | \$500,000.00 | \$500,000.00 |
| * Total Revenue (Line 4700 from CADAC form) | \$550,000.00 | \$550,000.00 | \$600,000.00 |
| * Total Federal Grants (Line 4200 from CADAC form) | \$60,000.00 | \$60,000.00 | \$60,000.00 |
| * Total Provincial Grants (Line 4300 from CADAC form) | \$100,000.00 | \$100,000.00 | \$100,000.00 |
| * Total Municipal Grants (Line 4325 from CADAC) | \$28,000.00 | \$28,000.00 | \$28,000.00 |
| Total Public Sector Revenue (Line 4300 of CADAC form) | \$178,000.00 | \$178,000.00 | \$178,000.00 |
| Community Derived Revenue | \$372,000.00 | \$380,000.00 | \$422,000.00 |

Grant Amount Requested: \$100,000.00

Buttons: Save, Save & Next, Save & Cancel, Check Spelling

Annotations:
 - Green arrow: when you have filled in all the numbers click on save to allow the form to self calculate.
 - Blue arrow: when you are finished click save and next

22. Diligence Questionnaire is familiar to galleries, please be sure to answer all questions. When you are finished click save and next.

Diligence Questionnaire

Official Organizational Mandate: * (Red arrow pointing to this section)

General Programming Outcomes: *

Highlight Anecdotes: *

Financial Management:

- * Identify and explain any major areas of variance between actual results and budget for the last complete fiscal year.
- * Identify and explain any material reductions in revenue and/or increase in expenses which you expect over the next 12 months. How do you propose to manage these changes?
- * What is the average length of services of current board directors?

Accounting:

- * Outline any current, proposed or contemplated changes in your organization's accounting policy?
- * In connection with an audit or review of your financial statements, or in connection with any other investigation or review, have you been advised of any issues relating internal controls or any other matter relating to the reliability of your accounting system and financial statements? If so, explain the nature of the issues and the corrective actions taken.

23. Now you need to add the attachments we told you about in the original e-mail communication. You will need the seven documents ready to download before you begin

The screenshot shows the 'Attachments' page in the eForms system. A table lists seven document types with their required status and download links. The first item, '01. Business or strategic plan', is circled in green. A green arrow points to the 'Download' column for this item. Below the table, a green text box provides instructions.

| Delete Document Type | Required? | Download | Document Description | Date Attached |
|---|-----------|----------|----------------------|---------------|
| 01. Business or strategic plan | Yes | --- | | No Attachment |
| 02. Cash reserve policy | Yes | --- | | No Attachment |
| 03. Copies of armoisonal material | Yes | --- | | No Attachment |
| 04. Governance proposals | Yes | --- | | No Attachment |
| 05. Listins of planned activities for the coming year | Yes | --- | | No Attachment |
| 06. Most recent annual financial statements | Yes | --- | | No Attachment |
| 07. Most recent annual return from corporate registry | Yes | --- | | No Attachment |

For each of the 7 items on the list you must upload a document. Click on the Document Type to begin each download.

24. For each of the 7 attachments name the document, attach the file and save and back

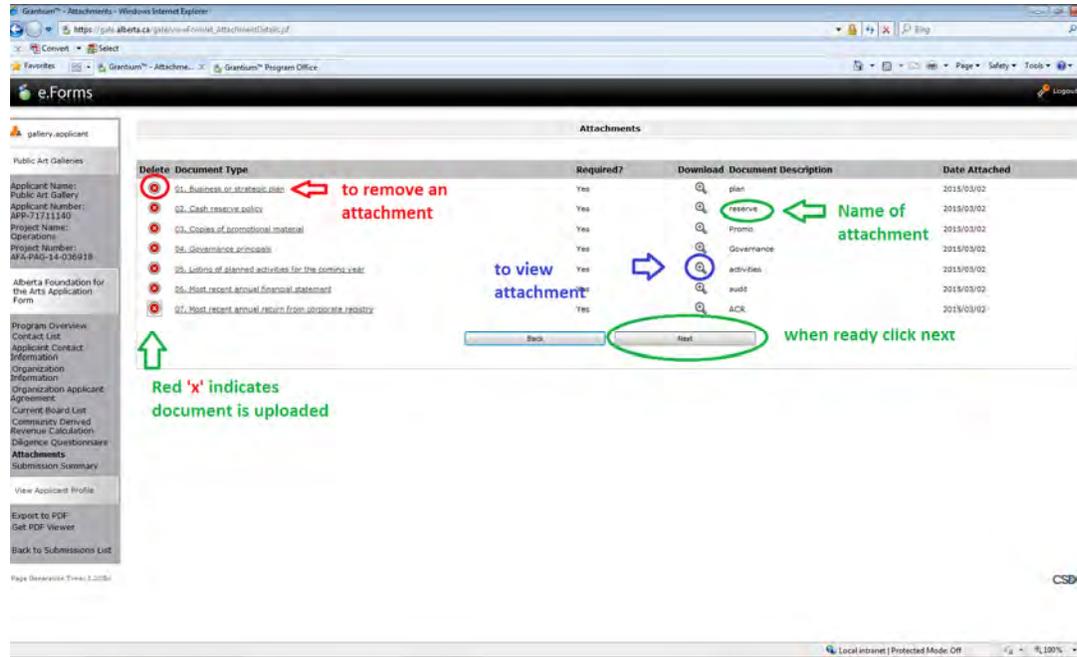
The screenshot shows the 'Attachment Details' page. It contains fields for 'Document Description', 'File Name', 'Document Type', 'Maximum Size', and 'Allowable Formats'. A 'Browse...' button is circled in red. A green arrow points to the 'Document Description' field with the instruction '1 Give your document a name (eg Business Plan 15)'. A red arrow points to the 'Browse...' button with the instruction '2 Click the Brouse Button and select your document from your computer'. A blue arrow points to the 'Save & Back to List' button with the instruction 'Save and return to the list to add the next document'.

1 Give your document a name (eg Business Plan 15)

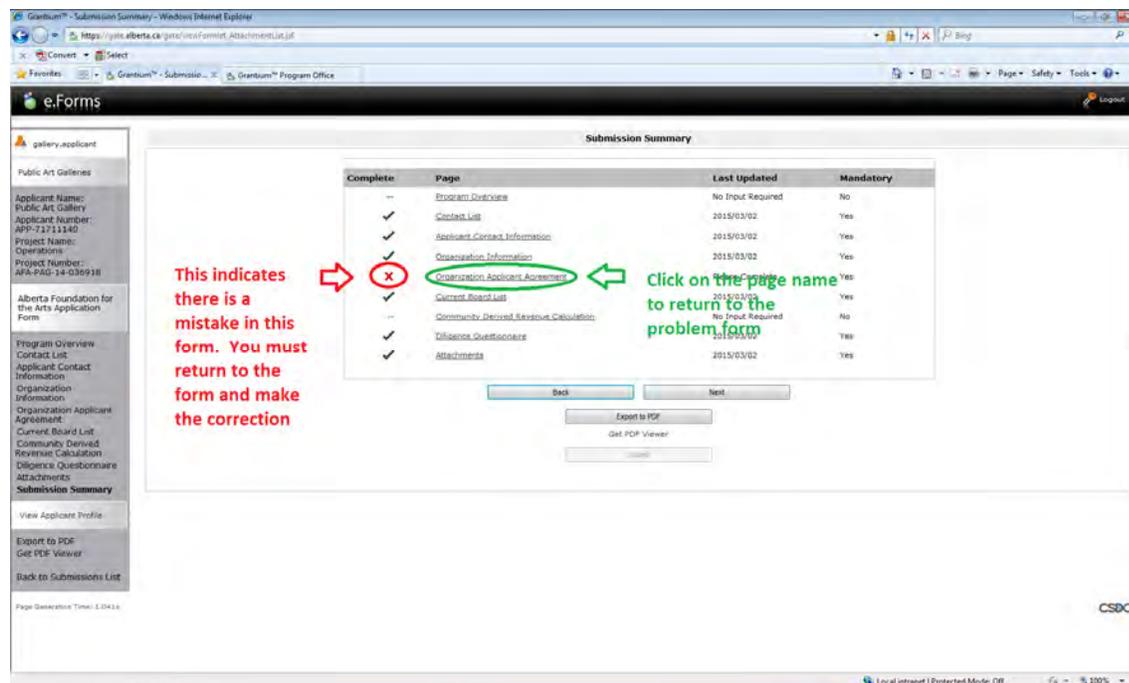
2 Click the Brouse Button and select your document from your computer

Save and return to the list to add the next document

25. The 7 red 'x's indicate that all required documents are uploaded. Be aware of the 4 mb maximum file size for each attachment. If your document is larger than that, scan it at a lower resolution or upload a notice stating that the information will be sent in hard copy.



26. You are almost finished. On the summary page there should be a row of green check marks to indicate that all forms in the application are complete. If you have missed something or made an error there will be a red 'X' beside that form. You must return to the form by clicking on the page name and complete it.



27. If you do have to correct a form you can return directly to the summary page by clicking on the Submission Summary link on the side tool bar. You can return to any form in the application by clicking on that title in the left hand column.

You should now have completed you application and all that is left is to print yourself a copy by clicking the Export to PDF button before you hit the Submit button. If you want to review the application on line before submitting you can hit the next button and it will take you back to the beginning. Once you are ready hit submit and you will receive an e-mail telling you that your application has been received and is ready for review by the AFA.

The screenshot shows the 'Submission Summary' page in a web browser. The page features a table of application components, a sidebar with navigation links, and a central area with 'Back', 'Next', 'Export to PDF', and 'Submit' buttons. Red and green annotations with arrows provide instructions on how to navigate and submit the application.

| Complete | Page | Last Updated | Mandatory |
|----------|---|-------------------|-----------|
| ✓ | Program Overview | No Input Required | No |
| ✓ | Contact List | 2015/03/02 | Yes |
| ✓ | Applicant Contact Information | 2015/03/02 | Yes |
| ✓ | Organization Info View forms: - Applicant Contact Information | 2015/03/02 | Yes |
| ✓ | Organization Applicant Agreement | 2015/03/02 | Yes |
| ✓ | Current Board List | 2015/03/02 | Yes |
| ✓ | Community Derived Revenue Calculation | No Input Required | No |
| ✓ | Diligence Questionnaire | 2015/03/02 | Yes |
| ✓ | Attachments | 2015/03/02 | Yes |

Annotations:

- Red text:** "All forms are now complete and the submit button at the bottom of the page is activated, ready for you to send in your application" (with arrow pointing to the 'Complete' column).
- Red text:** "when all is ready click the submit button to send us your application" (with arrow pointing to the 'Submit' button).
- Green text:** "If you click next you will return to the beginning of your application. This is a way to recheck your information" (with arrow pointing to the 'Next' button).
- Blue text:** "If you did have to go back and correct something you can return to this page by clicking here" (with arrow pointing to the 'Submission Summary' link in the sidebar).

28. The final screen shows you your project number and the time and date of your submission. This will be the official date we receive your application so it is important it is before the program deadline. The first icon on the line allows you to review the application, however once it is submitted you cannot make any changes to the forms. If changes need to be made you must contact your program consultant and request an amendment to the application..

The screenshot displays the 'Submissions' page for the applicant 'Public Art Gallery (APP-71711140)'. The page includes a sidebar with navigation options like 'Home Office Portal', 'Browse Funding Opportunities', 'Profile', 'My Account', 'Change Password', 'Workspace', 'Applicants', 'Funding Opportunity Regulations', 'Projects', 'Submissions', and 'Contact Us'. The main content area shows a search filter section with dropdowns for 'Applicant Project Name' (All Projects), 'Date Submitted' (On), 'Project Status' (Open Projects), 'Submission Version' (Latest Version), and 'Associate Type' (All). Below this is a table of submissions:

| Actions | Project Name | Project Number | Funding Opportunity Name | Step Name | Start Date | End Date | Associate Type | Version | Date Submitted |
|---------|--------------|-------------------|--------------------------|--------------------|------------|-------------|-------------------|---------|-----------------------|
| | Operations | APP-99C-14-036918 | Public Art Galleries | Submit Application | 1-Dec-2014 | 31-Mar-2050 | Primary Applicant | 1 | 2-Mar-2015 4:35:24 PM |

Annotations on the screenshot include:

- A red arrow pointing to the 'Project Number' column with the text 'Your project number'.
- A red arrow pointing to the 'Date Submitted' column with the text 'Date and time of submission'.
- A green arrow pointing to the 'Actions' column with the text 'Click here to review your completed application'.

If you are still having problems please contact your program consultant and we will do our best to help you through the new system. This is new for all of us if there is a glitch in the program we will work through it together. If there are items that are unclear in the User Guide please let us know so we can ensure you are getting as much support as possible.